

WUG Meeting Minutes, August 27, 2009

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**Introductions:**

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| FEI:             | Becky Kinney    |
|                  | Lee Keitz       |
|                  | Ludwing Najera  |
|                  | Sarah Moore     |
| San Diego:       | Alice McLennan  |
| Salt Lake County | Cory Westergard |
| Hawaii:          | Steve Okano     |
| Maryland:        | Joe Hong        |
|                  | Janet           |

1. Review items posted to the forum:
  - a. Enhancement # 4725: Group Session List
    - i. It was suggested that we remove the Group Name column, and put the Group Name in the header instead.
    - ii. This item was otherwise approved.
  - b. Enhancement #4002: Combining Staff Account screens
    - i. HI expressed a concern about how this will impact the division of Staff Management roles. They will discuss further with Becky before making a decision.
    - ii. This item was otherwise approved.
  - c. Enhancement #4683: Client Profile reorganization
    - i. Each instance's configurations would carry over to the new design
    - ii. The Next button would still take you to Alternate Names and Contact Info
    - iii. It was noted that we should move education fields also, even though HI doesn't have them and this item was generated by them.
      1. It was agreed that everything except Special Needs and General Client Comments should be moved.
    - iv. Cory also requested that education status (which HI doesn't have here) be moved to Admission. While participants liked this idea, this would be a separate request.
    - v. Mendocino objects based on the fact that this is not commonly accessed information, whereas address and additional names is.
    - vi. This item is tentatively rejected based on Mendocino's objection.
  - d. Enhancement #4621: Non-episode Contact

- i. Problem description column needs to be renamed to Signed Note. Add a new column called Unsigned Note. On screen, the Signed Note field is un-editable. Add Sign Note button.
  - ii. Data migration: anything they already had in Problem Description should go into the Unsigned Note field.
  - iii. No objections.
    - 1. Would like to see Duration field format consistent with encounters Duration field. Data migration would be a concern, since current field is free text entry, so values are likely to be inconsistently formatted.
    - 2. They mentioned that one of the problems with this feature is that there's no way to know if there's a non-episode contact for the client without specifically checking. Non-episode contacts are not tied to the client activity list, etc.
    - 3. SLCo and Mendo are using an Intake and Misc note instead of Non-episode contacts.
2. New topics:
- a. Diagnosis at Discharge. Currently the Discharge module doesn't include the Diagnosis screen although it appears to be included in the menu tree. Because it isn't part of the Discharge, user has to purposely select Discharge Diagnosis from the menu tree to reach this screen. SLCo would like to discuss this as a change to Core.
    - i. The "best" way to address this is with the "Check for Completeness" so that the Discharge shows up as incomplete on the Activity List without this.
    - ii. Otherwise, we can discuss redesigning Diagnosis. We would like to address this as part of the upcoming WITS redesign.
  - b. Sonoma requested that we determine if there is any interest in developing an NTP (Narcotic Treatment Program, or Methadone dosing) module.
    - i. HI and SLCo are both interested, but only have one provider each.
    - ii. SMART in MD has some of this functionality but it's not fully implemented- they may want to be involved in any discussions about this.
  - c. Billing questions
    - i. "I would like to see different items on the encounter list screen. Right now we have Date, Service, Encounter ID, Staff, Program, Status and Actions. I think it would be helpful to have **start time** and/or units on this screen so that providers can see on first glance exactly which encounter they are looking at (some providers have more than one service type on the same day) or if there is an error or duplicate. It would provide more information upon first glance."
      - 1. Cory recommends this be on the note list screen also, but without units.

2. Janet in MD says she's heard that outcome would be a good column too, but this is apparently only of interest to Maryland providers.
  - ii. "Right now, I can reject encounters that have errors when providers report them to me. Would it be possible for them to reject the encounter and make corrections (assuming they notice the error) before it is batched to billing, i.e. would it be possible for them to do this from the encounter screen? Maybe actions to review or reject?"
    1. FEI's thought is that this should be happening at the Provider Billing level? That's a Provider claim item level function. The only time you can't do it is if the billing person has changed the charge amount in some way.
    2. An enhancement might be that a Clinician recall option be added, which would allow them to call the encounter back from the Provider Billing level. Participants on the call did not have particular interest in this proposal.
  - iii. "Could we get filters on the encounter screen so that providers can look at encounters by date or service type only?"
    1. FEI's thought is that the Billing Encounter List screen and associated role should provide this functionality.
    2. The question was posed: Does treatment team access role apply to the Encounter List screen? Are there other access level issues? FEI will investigate.
3. Future topics:
- a. Client Profile navigation continues to be on FEI's agenda.
  - b. Cory in SLCo requested that we make a note on the forum topics to say when an approved item will be released.
  - c. Thinking about the redesign- Cory says that diagnosis should not be done at admission (should be done before admission?), since Admission is done by clerical people. This might cause issues for TEDS though. Steve says the current workflow is more practical.
  - d. Demo of Alerts at our next meeting. Lots of interest from SD, Mendo.
  - e. Demo of context specific help when it becomes available (being done for AK).