Welcome of the CalMHSA EHR Conference

Where we have been:

2021   2022   2023

- Vet Idea
- Develop Giant RFP
- Contract with Streamline
- Begin Aggressive Development Work
- Imperial Pilot Go Live
- Lake & Glenn Go Live
- 21 Counites go live

2021

Where we have been:

2021 — Vet Idea · Develop Giant RFP — 4 staff

2022 — Contract with Streamline · Begin Aggressive Development Work — 10 staff

2023 — Imperial Pilot Go Live · Lake & Glenn Go Live · 21 Counites go live — 40 staff
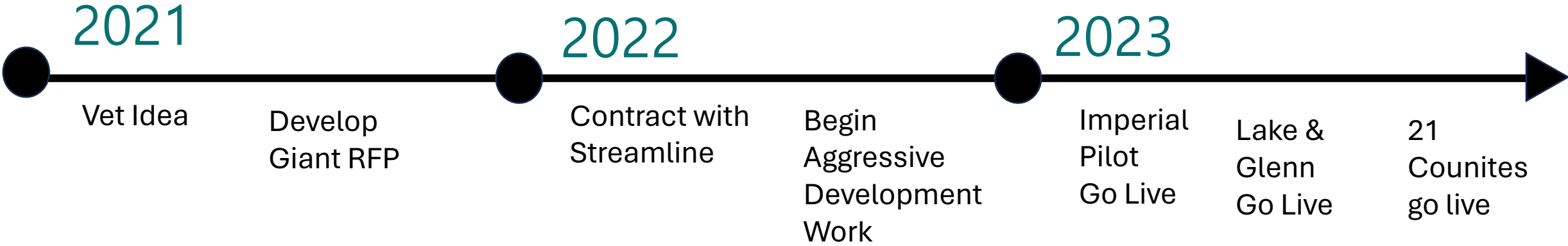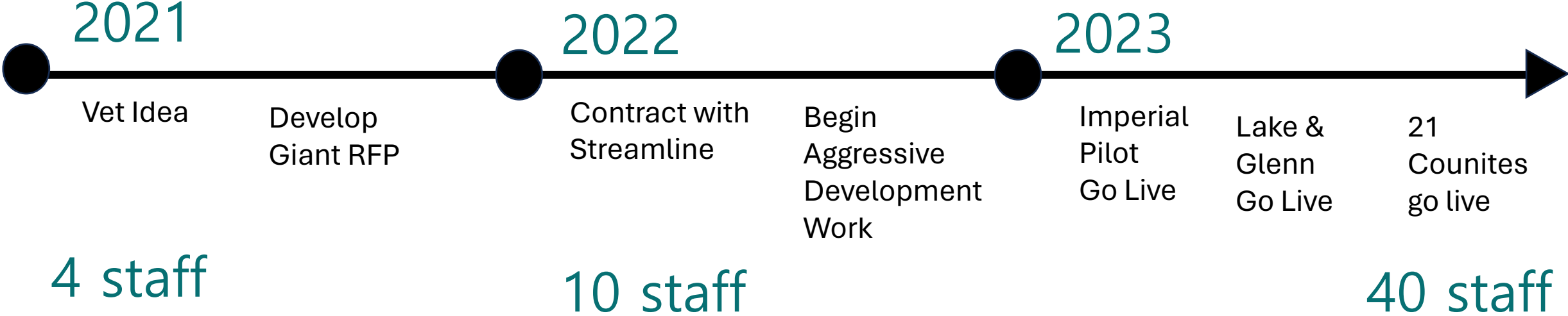
Where we are by the numbers:

- Monica Quezada in Fresno signed the 1,000,000th note on September 15th

- We currently have 1.8 million in services entered

- We are on trend to claim for 1.2 billion in services this FY

Challenges &
Changes

Our Core Values:

- Uplift the community

- Embrace the challenge without fear of failure
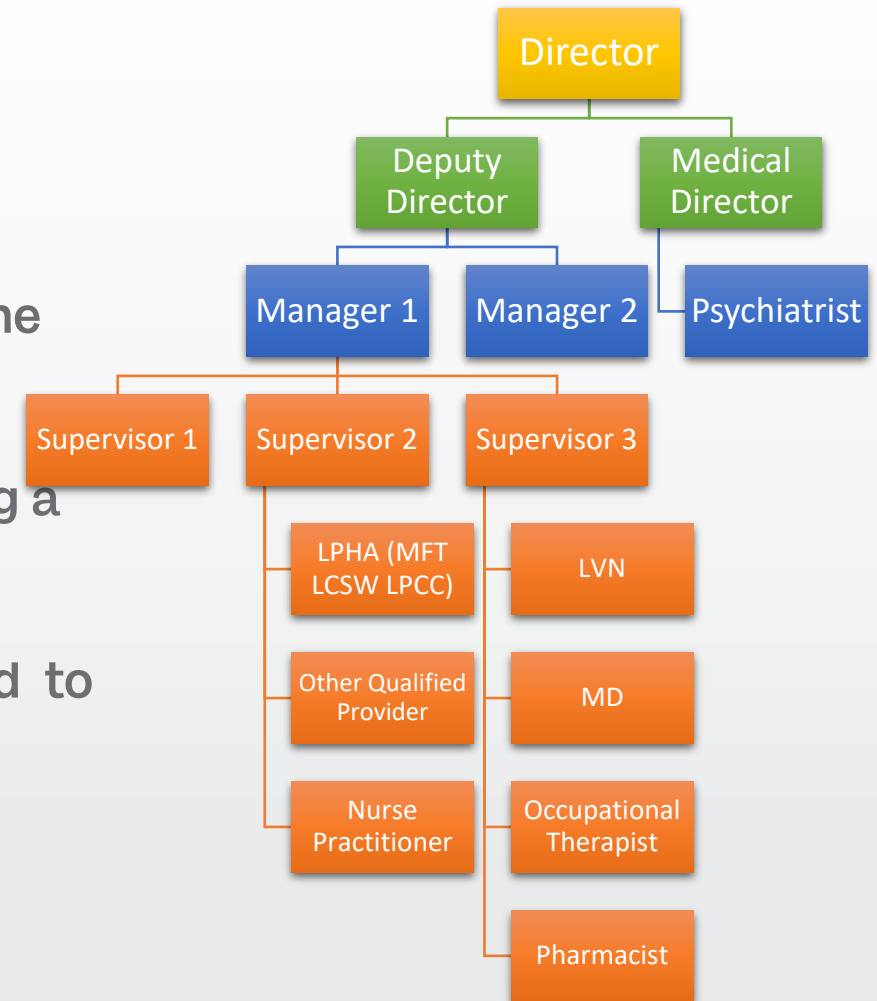
- Work hard, laugh often, be present

Staying the Course
Key Highlights:

- The vision is bigger

- Looking forward to leveraging the scale of our project to move forward.

- Interoperability Solutions

- CalMHSA Collective Data Solitons

Organization Hierarchy Concepts:

- Position Nodes in the tool define the organization 'jobs'.

- The hierarchy allows you to build the positions & their reporting structure, in an iterative fashion.

- Each position has attributes defined that keep track of the position (position type, ID, Level, Start/End Date, Budget)

- Each position can be assigned to a parent-node depicting a reporting relationship.

- Organizational positions tend to be more static compared to how individuals/staff move through them.
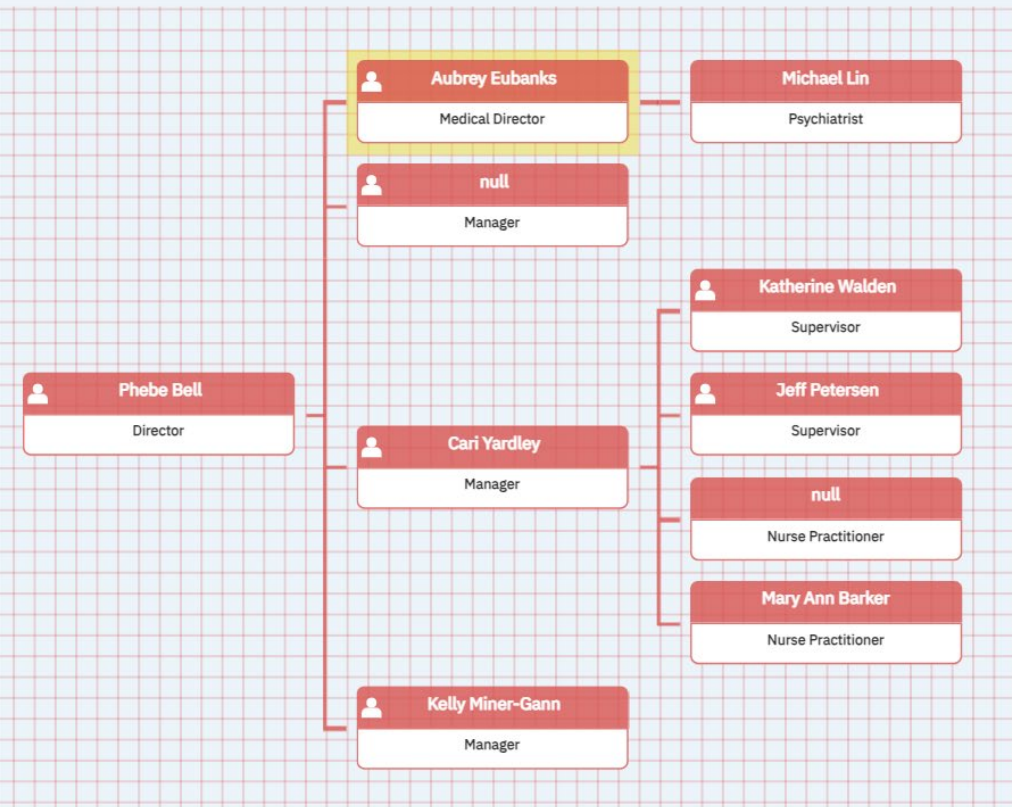
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Org Hierarchy

Edit Position Type:	Medical Director ▾	**Edit Staff Assignment:**	Aubrey Eubanks ▾
Internal Hierarchy Level:	0	**Edit Staff StartDate:**	
Edit Internal Position ID:		**Edit Staff EndDate:**	
Edit Position StartDate:		**Edit Staff FTE% (0.01 - 1.00):**	1
Edit Position EndDate:			
Edit Position Budget($):	0		

Submit   Cancel

Left sidebar menu

- CT Consent To Share Data
- CO Continuity of Care Docu...
- CR CSI Reporting Summary
- EM Error Messsage List Page
- FR FSP Report Summary
- GA GL Accounts
- LE Life Event Set Up
- MD MAT Dispenser
- MI Medication Inventory Tr...
- ML Medication/Lot/Bottle
- ME MMEF Eligibility Records
- MC My Client Activities
- My Office   ›
- OH Org Hierarchy
- O Organizations
- OR OSHPD Reporting Summ...
- PC Primary Care Providers
- PS Primary Sync
- PG Provider Group
- PS Provider Staff Uploads
- P3 PSC-35 Reporting List P...
- RL Referral List Page
- Client   ›
- Program   ›
- Administration   ›
- Provider   ›
- CF Client Fee
- CF Client Fee Template

Org chart

- **Aubrey Eubanks** — Medical Director
- **Michael Lin** — Psychiatrist
- **null** — Manager
- **Katherine Walden** — Supervisor
- **Jeff Petersen** — Supervisor
- **Phebe Bell** — Director
- **Cari Yardley** — Manager
- **null** — Nurse Practitioner
- **Mary Ann Barker** — Nurse Practitioner
- **Kelly Miner-Gann** — Manager

Reports:

◄   ◄   1   of 1   ►   ►| ←   ⊗   ⟳   🖶   ▤   ▥   💾▾   100% ▾   Find | Next

Organization Hierarchy Report - NV QA

Staff Full Name	Position	Service Count	Units
⊟ Yardley, Cari	Manager	342	14860.00
⊟ Walden, Katherine	Supervisor	131	7072.00
Kindschi, Dahlia	LPHA (MFT LCSW LPCC)	22	1251.00
Zettler-Mann, Laura	LPHA (MFT LCSW LPCC)	17	975.00
Pallazola, Erika	LPHA (MFT LCSW LPCC)	11	536.00
Vacant Position	LPHA (MFT LCSW LPCC)	0	
McCourtney, Keith	LPHA (MFT LCSW LPCC)	13	688.00
SimcOff, Aliyah	LPHA (MFT LCSW LPCC)	19	995.00
Kiiveri, Anna	LPHA (MFT LCSW LPCC)	19	1169.00
McHugh, Thomas	LPHA (MFT LCSW LPCC)	30	1458.00
Vacant Position	LPHA (MFT LCSW LPCC)	0	
⊟ Petersen, Jeff	Supervisor	133	7132.00
Hyde, Leo	Other Qualified Provider	18	1017.00
Jefferson, Fred (Carl)	Other Qualified Provider	2	120.00
Miller, Angela	Other Qualified Provider	71	2246.00
Montano, Maria	Other Qualified Provider	3	132.00
Douglas, Brandy	Other Qualified Provider	18	776.00
Sowa, Joseph	Other Qualified Provider	5	1800.00
Christensen, Elifelet	Other Qualified Provider	16	1041.00
Vacant Position	Nurse Practitioner	0	
Barker, Mary Ann	Nurse Practitioner	78	656.00

Moving forward with gratitude