

The Coordinated Assessment System

An Agency's Best Practices



Presenters:

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Agenda

Review the Coordinated Assessment System

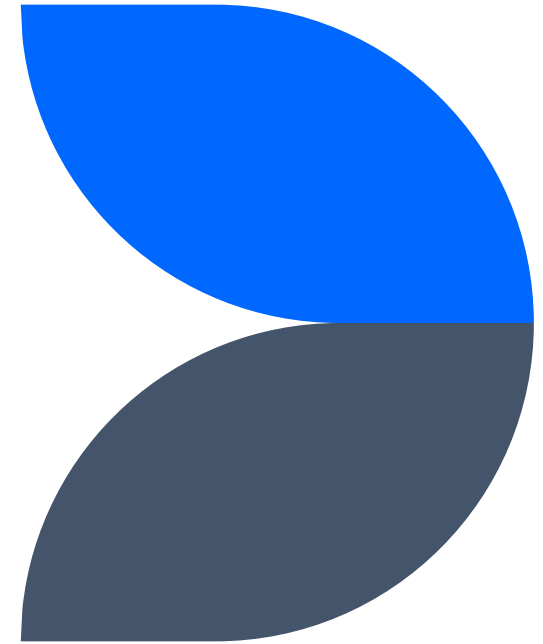
Present Agency Best Practices

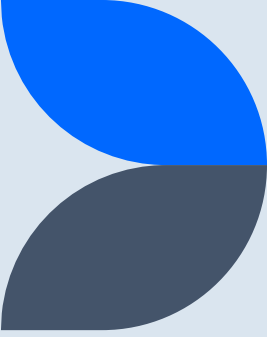
Discuss the OPWDD Quality Assurance Process



Primary Goal:

How can an agency ensure that the resulting CAS Personal Summary accurately depicts an individual's level of need?





CAS Committee

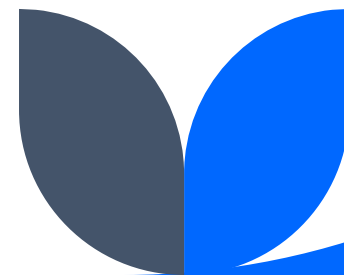
- ❖ Who should be included?
 - Treatment Coordination (Finance), Program, Nursing, Behavioral Services

- ❖ What did the CAS Committee focus on?
 - Who are the appropriate team members to attend the CAS?
 - How do we educate families and staff on the CAS?
 - What documentation is critical for the CAS?

Identifying Staff & Family Training

Who should be trained?

- Program leadership
- Residential and Day Habilitation staff
- Nursing and Behavioral Services
- **FAMILIES!**



Realistic: adjective

Re·al·is·tic : based on what is real rather than on what is wanted or hoped for : not impractical or visionary

Training Focus:

1. Scope
2. Language
3. Documentation
4. Internal CAS Procedure

Documentation

- **Medical Documentation**
 - All appointment notes in the last 365 days, including doctors' notes and ICD codes.
 - Seizure reports, Bowel Charting, Medication Administration Record, Lab Work
- **Behavioral Documentation**
 - Behavioral reports- including intervention data, incident reporting and associated narratives
- **Psychiatric Care**
 - Appointment Session notes
 - Current and historical diagnoses related to behavioral and mental health
- **Historical Documentation**
 - Psychological Evaluations
 - Social History
 - Hospitalizations
- **Service Documentation**
 - Daily service provision notes
 - Monthly Summaries

CAS Procedure

1

Scheduling

Identifying most appropriate time to schedule assessment

2

Data Collection

Collect appropriate documentation

3

Review

Review the previous Assessment for any inaccuracies

4

Pre-Meeting

Team meets to review previous CAS and submitted documentation

5

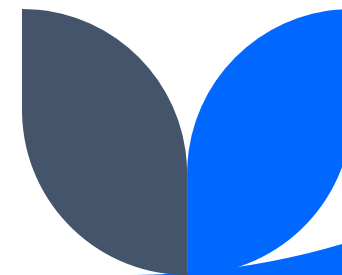
Assessment

Complete assessment & review summary 48 hours after.

Pre-CAS Meetings

What is reviewed?

- ❖ Initial Assessment
 - ❖ Identify prior errors/inaccuracies
- ❖ Medical documentation
 - ❖ Consider new diagnoses, medications, falls, seizures, ER visits, etc
- ❖ Behavioral documentation
 - ❖ Interventions utilized, behavioral frequencies, restrictions
- ❖ Program documentation notes
 - ❖ Documented level of need & staff support



Diagnosis

Documentation for all diagnosis

- Diagnosis present , monitored but no active treatment
- Diagnosis present, receiving active treatment

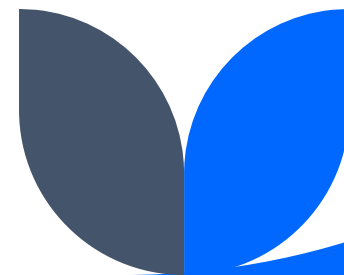


ADLS/IADLs

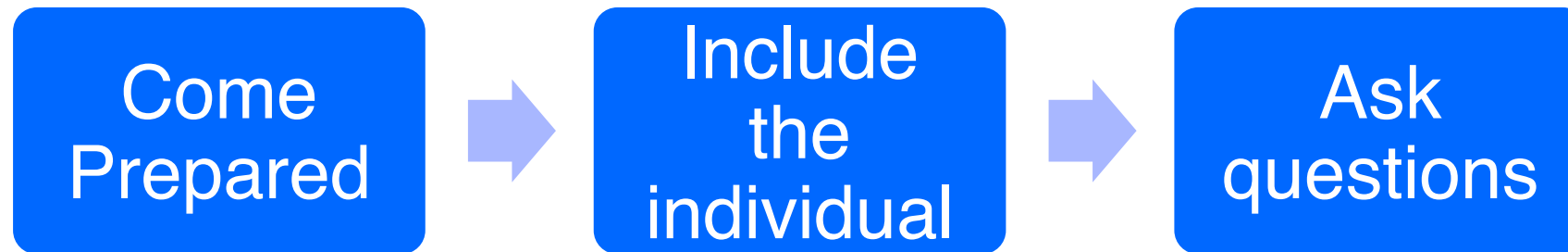
- Independent
- Supervision
- Extensive Assistance
- Maximal Assistance
- Total Assistance

Behavioral

- Present but not exhibited in the last 3 days
- Exhibited on 1-2 days of the last 3 days
- Exhibited daily in the last 3 days



CAS Meeting

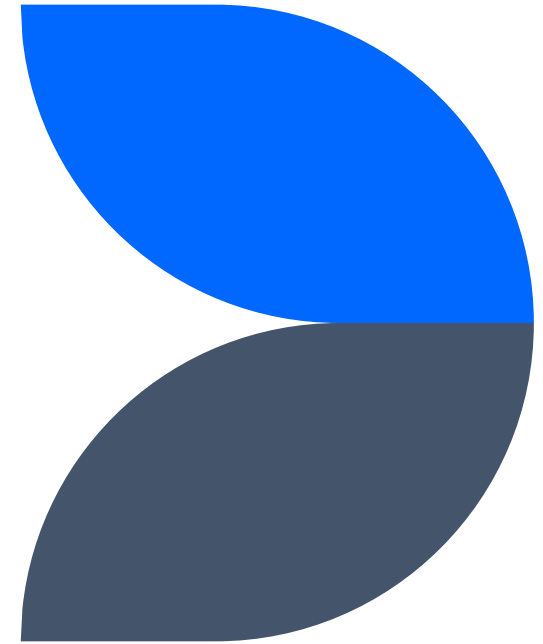


ASK THE QUESTION!

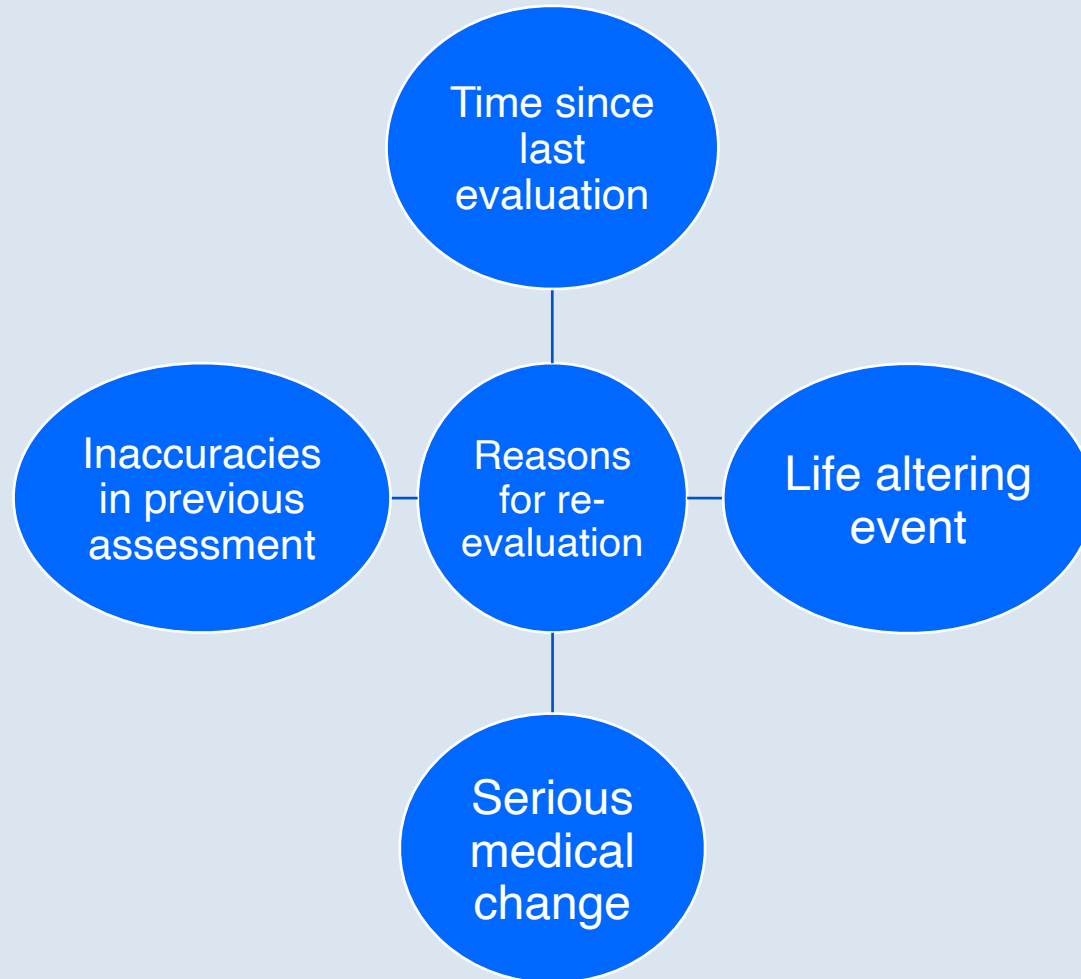
- When unclear, ASK:
 - Ask for....
 - Clarification
 - Examples
 - Explanation

What to do after a CAS assessment?

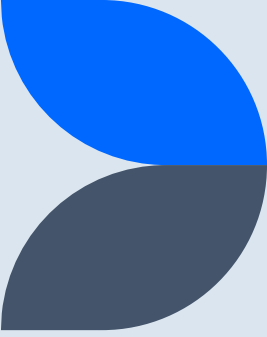
- Review the CAS Summary within 48 hours of assessment
- Meet with team members to discuss any concerns
- Write up concerns and share with care manager within 30 days of assessment



When to manually request a re-evaluation:



Timely CAS Assessments



- All our CAS assessments are up to date, with in the 2-year time frame.
- EMR assessment dates – contact OPWDD to get on the list
- Any change in participant status – contact Care Coordination for review.

Lessons Learned

- Interdisciplinary Approach
 - Support from the Executive Level on Down
- “Leave emotions at the door”

CAS Quality Assurance

- QA Protocols
 - Internal QA Auditors sit in on assessments
- QA Process for coding errors has been established
- Email: coordinated.assessment@opwdd.ny.gov