

The Care Manager/Qualified Intellectual Disabilities Professional (QIDP)/Facility Designee plays a vital role in the Child and Adolescent Needs and Strengths (CANS) and Coordinated Assessment System (CAS) assessment processes by informing the individual when they have been identified for assessment, assisting the assessor with confirming/obtaining contact information, scheduling/coordinating, making documentation available to the assessor for review, and reviewing the assessment output documents with the person, actively involved family member or Legal Guardian (LG), and the person's supports (i.e., residential provider, Consumer Advisory Board (CAB) representative), as appropriate. The Care Manager's/QIDP's quick response to an assessor's request is important because these assessments are a **time-sensitive process**.

To assist the Care Manager/QIDP/Facility Designee in understanding their role, the following informational documents are available on OPWDD's website: Comprehensive Assessments Brochure, Requirement for CANS/CAS Assessment Fact Sheet, Documentation Review for the Comprehensive Assessments, and The CAS Summary Guidance Document.

#### **Initial Contact**

Assessment Operations will contact the Care Coordination Organization (CCO), Intermediate Care Facility (ICF), or non-OPWDD residential program/facility to verify/obtain:

- Person's contact information
- Identification of knowledgeable individual(s)
- Access to documentation
- Identification of LG and/or actively involved family member/key staff
- Communication/language access needs

#### **In OPWDD Settings, Care Manager's/QIDP's Role in the Assessment Process**

Once an individual is identified for assessment, the Care Manager/QIDP must reach out to the individual/family to inform them of assessment assignment, discuss the pending assessment and steps of the process, and support timely completion of the assessment. The Care Manager/QIDP/Residential Facility Designee will review the documentation that will need to be shared and the plan to make these available to the assessor. The Care Manager/QIDP will discuss the need for a review of the assessment summaries to support the ongoing care planning conversation.

- The assessor will contact the person/family/residential support team and schedule an interview.
- The assessor will communicate to the Care Manager/QIDP the date and time of the interview.
  - o If the Care Manager/QIDP learns that the person is experiencing a change in their life that requires the assessment to be rescheduled (i.e., hospitalization, unexpected emergency/crisis, etc.), the Care Manager/QIDP will contact the assessor as soon as possible.
- The assessor will inform the Care Manager/QIDP, if the person has identified an individual that they would like to have present at the interview for support if applicable.
  - o The Care Manager/QIDP will be asked to inform the individual identified for support, the location and time of interview.
  - o If the Care Manager/QIDP is aware of other key individuals in the person's life that they would want to have at the assessment interview, the Care Manager/QIDP will be asked to inform the individual(s) of the location and time of the interview and notify the assessor
- The assessor will need to review certain documents, in order to complete the assessment (refer to the Documentation Review for the Comprehensive Assessments document for guidance).
  - o The Care Manager/QIDP will ensure that all obtainable and requested documentation that supports the understanding of the individuals needs and supports be available for an assessor to review on or before the assessment date.
- For reassessments, this process may differ and additional Care Manager/QIDP support may be required.

### **CANS Strengths and Needs Report and CAS Output Summaries**

The CANS Strengths and Needs Report or CAS output summaries will be available 24 hours after the assessment is finalized (Note: Finalization of the CANS/CAS could take up to three days from assessment reference (interview) date). The CANS Strengths and Needs Report or CAS output summaries can be found in the "Supporting Documents" section of the person's file in CHOICES. The Summary Guidance Document can be found on the OPWDD website.

- **The Care Manager/QIDP is responsible for reviewing, sharing, and discussing the CANS Strengths and Needs Report or CAS output summaries with the person, actively involved family member/LG, and the person's supports (i.e., residential provider, Consumer Advisory Board (CAB) representative), as appropriate, within 30 days from availability. The CANS Strengths and Needs Report or CAS output summaries should not be distributed without having a proper review and discussion of them. The Care Manager/QIDP should utilize the Summary Guidance Document to facilitate the discussion of the CAS output summaries. In addition, the Care Manager/QIDP should document the discussion, as well as any issues or concerns that result from it.**
- The Care Manager/QIDP should ensure that any new information found in the CANS Strengths and Needs Report or CAS output summaries is addressed with the person's supports, as appropriate, and documented in the monthly note and/or Life Plan.

Questions and/or concerns regarding CANS Strengths and Needs Report or CAS output summaries should be emailed to: [coordinated.assessment@opwdd.ny.gov](mailto:coordinated.assessment@opwdd.ny.gov)