



CARE

(Community
Assistance,
Recovery and
Empowerment)
Act

California Health & Human Services Agency
Person Centered. Equity Focused. Data Driven.

Data Collection, Reporting & Evaluation Ad Hoc Group Meeting

October 9, 2024

California Health & Human Services Agency

Person Centered. Equity Focused. Data Driven.



1. Welcome and Introductions

Virtual Meeting Guidelines

- Meeting is being recorded
- Zoom captioning enabled

Members & Policy Partners

- Mute/Unmute works
- Please stay ON MUTE when not speaking and use the “raise hand feature” if you have a question or comment.
- Please turn on your camera as you are comfortable

MEMBERS OF THE PUBLIC will be invited to participate during public comment period

Ad Hoc Group Requirements

- Meetings are open to the public and subject to Bagley-Keene Open Meeting Act requirements.
- Members understand and acknowledge that CalHHS has a responsibility to implement the CARE Act as enacted in statute.
- This is not an oversight or voting group. The goal is to generate ideas and solutions to support the successful implementation of the CARE Act.
- Meeting agendas are prepared and posted online 10 days in advance of a meeting. Members are encouraged to suggest agenda items.

Ad Hoc Group Agreements

- Be present and curious.
- Respect each other's expertise and time and participate fully.
- Encourage different opinions and be respectful of disagreements.
- Be accountable to your fellow group members and practice patience and persistence – we can't solve everything in a single conversation or meeting, but we need to remain solution focused.
- Assume Positive Intent: Trust that people are doing the best they can

Data Collection, Reporting & Evaluation Ad Hoc Group Members

Co-Chairs

- Keris Myrick
- Beau Hennemann

Special Advisor

- Katherine Warburton

Facilitators Desert Vista Consulting

- Karen Linkins
- Jennifer Brya
- Ruby Spies
- John Freeman

Members

- Alison Morantz
- Christopher Guevara
- Dr. Clayton Chau
- Dawn Williams
- Jennifer Hallman
- John Parker
- Kara Taguchi
- Dr. Sharon Ishikawa
- Sean Evans
- Susan Wilson
- Tami Mariscal
- Tim Lutz

2. Recap Previous Meeting

Recap of July Meeting

- Introductions and Goals of Group
- Heard from RAND about the revised logic model and evaluation plan for the independent evaluation
- Minutes available on [CARE Act Working Group page](#)

3. Discussion of CARE Implementation and Q&A

Recent San Diego CARE Graduation



Judicial Council Updates



Overview of Judicial Council's Role in the CARE Act

Commitment to interagency communication and coordinated planning at state and local levels

Assist courts in local CARE implementation

Statewide rules, forms, legal information, training and consultation

Judicial education and technical assistance

Trial court data reporting

Provide State Bar funding for Legal representation

Self-help legal information, assistance, and tools

Consultation on legislation

Support to Courts

Trainings:

- CARE Act Process/Overview
- Housing and the CARE Act
- CARE Agreements, Plans and Orders
- Primer on Confidentiality
- CARE Act Eligibility
- Effective Communication and Reasonable Modifications for Court Users with Psychiatric Disability
- Trauma Informed Care and the CARE Act
- Schizophrenia Basics

Support to Courts (continued)

Resources:

- Care Act Implementation Toolkit
- Process Flowcharts
- Sample local forms and other documents

Technical assistance:

- Monthly CARE Act Court-Only Office Hours
- Cohort 2 Outreach and Check-in Meetings

CARE Act Resources

Adult Mental Health Page: <https://www.courts.ca.gov/48654.htm>

CALIFORNIA COURTS
THE JUDICIAL BRANCH OF CALIFORNIA

Courts

Self-Help

Forms & Rules

Opinions

Programs

Policy & Administration

News & Reference

Programs > Families and Children > Mental Health > Adult Civil Mental Health

Families and Children

Family Law

Juvenile Law

Mental Health

Adult Civil Mental Health

Conservatorship

Children, Youth and Families Mental Health

Conferences & Trainings

Adult Civil Mental Health

Print

This page includes tools, resources, and information for judicial officers, court staff and justice system partners related to adult civil mental health in the courts. Visit the CARE Act page on the [self-help guide](#) for more information.

CARE Act

Community Assistance,
Recovery, and
Empowerment Act

The Community Assistance, Recovery, and Empowerment (CARE) Act authorizes specified adult persons to petition a civil court to create a voluntary CARE agreement or a court-ordered CARE plan that can include treatment, housing support, and other services for persons with untreated schizophrenia or other psychotic disorders. The CARE Act creates a new pathway intended to deliver mental health treatment and support services upstream to the most severely impaired Californians who often experience homelessness or incarceration without treatment. This pathway is accessed when a person, called the "petitioner", requests court-ordered treatment, services, support, and housing resources under the CARE Act prioritized for another person, called the "respondent". The petitioner must fall under a specific group of people, such as specific family members, housemates, first responders, and behavioral health workers. The respondent must have a diagnosis on the schizophrenia spectrum or other psychotic disorders.

When Does the CARE Act Start?

The CARE Act ([SB 1338](#)) took effect on January 1, 2023. On September 30, 2023, [SB 354](#) took effect and clarified requirements for the CARE Act process.

When Will the Courts Implement?

16

Community Resources

In addition to providing support to the courts, the Judicial Council has developed resources specifically for the public.

Resources (Adult Civil Mental Health page):

- CARE Act Eligibility Criteria Video
- CARE Act 101 Webinar
- CARE Act Toolkit:
 - CARE Act Fact Sheet
 - Glossary of CARE Act Terminology
 - CARE Act Eligibility Sheet
 - 10 Things to Know About the CARE Act



CARE Act Resources (continued)


CARE Act – Self-Help Guide Page: <https://selfhelp.courts.ca.gov/care-act>

CARE ACT

Helping a person with a severe mental illness

This guide has information about

- The CARE Act
- Other options to help someone with a severe mental illness
- Help at Self-Help Centers with CARE Act forms



CARE Act Eligibility Criteria

Watch later Share

CARE
(Community Assistance, Recovery and Empowerment) Act

Watch on YouTube

Explore options to help someone with a severe mental illness

Get information about different ways to help someone and where they can get support.

The CARE Act

Get information about what the CARE Act is, what is required, and how to start the CARE process.

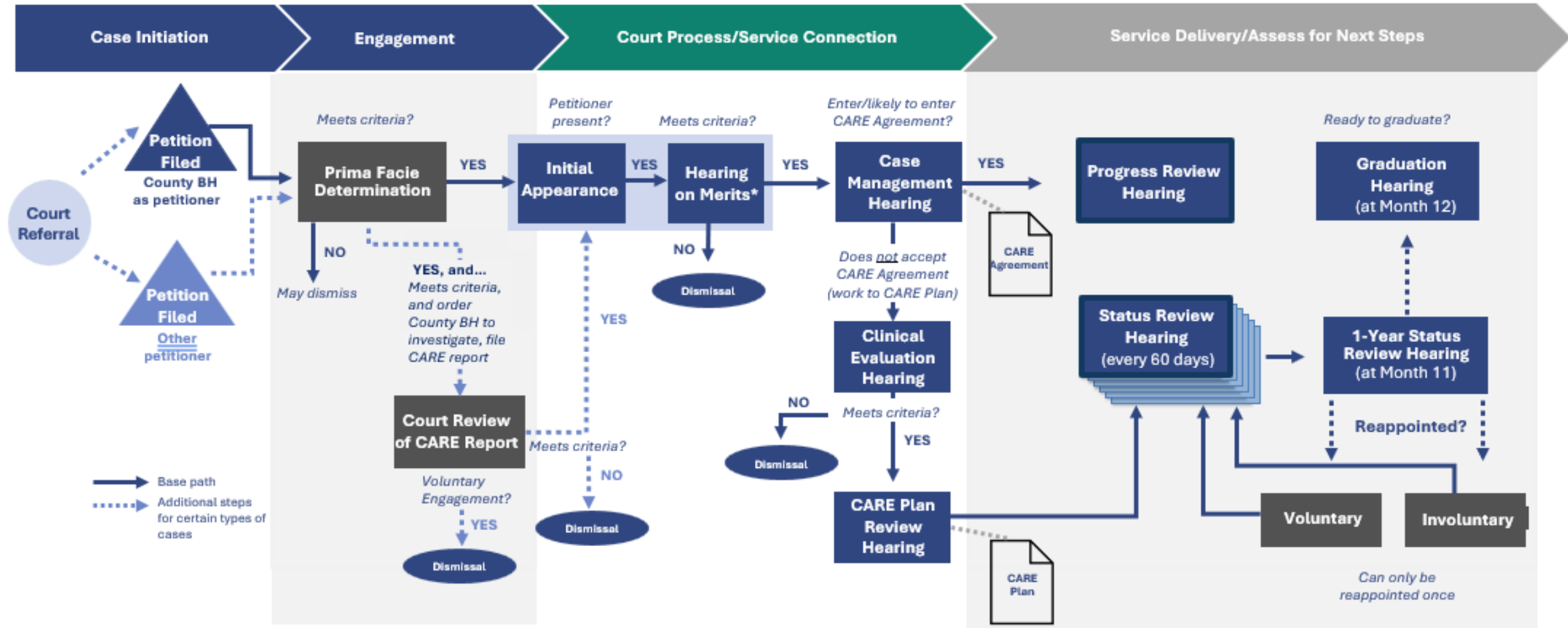
Visit a Self-Help Center

Each court has a Self-Help Center where you can get free legal help with court forms and answers to legal questions about CARE Act proceedings. The Self-Help Centers can help you with filling out CARE Act forms.

Self-Help Center Support

- Legal information available to anyone who walks in the door
- Document assembly program to help complete petition
- Education about the legal process is available
- Referrals made to other organizations to help provide additional support

The CARE Act Court Process



*The Initial Appearance and Hearing on the Merits can occur simultaneously, if the petitioner, respondent, and court agree.

Revised 4/22/24

CARE Act Forms

**14 forms
available at
courts.ca.gov**

Found 15 forms matching "care act".

Forms marked with the asterisk ("*") are adopted for mandatory use by all courts.

CARE-050-INFO

Information for Petitioners—About the CARE Act

Effective: September 1, 2024

[See form info](#)

[Download](#)



汉语

한국어

español

Tiếng Việt

CARE-060-INFO *

Information for Respondents—About the CARE Act

Effective: September 1, 2024

[See form info](#)

[Download](#)



汉语

한국어

español

Tiếng Việt

CARE-100 *

Petition to Commence CARE Act Proceedings

Effective: September 1, 2024

[See form info](#)

[Download](#)



汉语

한국어

español

Tiếng Việt

Data Collection and Reporting

To ensure efficient and accurate collection of required data for reporting the Judicial Council:

Facilitates trial court data collection :

- Data dictionary and reporting instructions for courts
- Manual monthly data collection for required data elements
- Quarterly data collection from State Bar

Analyzes and reports data:

- Quarterly reporting of required data to DHCS
- Trial court data will be included in reports published by DHCS

Trial Court Data Elements

**Petitions
Submitted**

**Initial
Appearances
Set**

**Initial
Appearances
Held**

Hearings Held

**CARE Plans
Ordered**

**CARE
Agreements
Approved**

**Petitions
Dismissed**

Any Questions?

CARE Act Email: CARE.Act@jud.ca.gov

CARE ACT DATA AD HOC GROUP

October 9, 2024

Data Collection and Reporting Updates

Agenda

Overview of the CARE Act Data Reports

Description of CARE Act reporting responsibilities and timelines

CARE Act Early Implementation Report

Description of Early Implementation Report data elements

CARE Act Annual Report

Overview of Annual Report requirements and timeline

Legislative Updates

Overview of legislative updates and impact on CARE Act Data Dictionary 2.0

CARE Act Reporting

Annual Report

Collect data to monitor the performance of CARE Act model implementation.



Include outcome measures to assess the scope and impact of the CARE Act model.



Conduct a health equity assessment of the CARE Act to identify demographic disparities to inform disparity reduction efforts.



Produce the annual report
July 2025, 2026,
2027, & 2028

Independent Evaluation

Conduct survey of program participants



Conduct an independent evaluation to highlight racial, ethnic, and other demographic disparities



Include analyses regarding the impact of the CARE Act on disparity reduction efforts.



Develop legislative reports in year 3 and year 5 of implementation.

CARE Act Data Reports

Report	Type	Reporting period	Report due date
Early Implementation Report (JC Data Only)	Legislative Report	October 1, 2023 – June 30, 2024	December 1, 2024
Annual CARE Act Report	Posted to DHCS internet website	October 1, 2023 – June 30, 2024	July 1, 2025
Annual CARE Act Report	Posted to DHCS internet website	July 1, 2024 - June 30, 2025	July 1, 2026
Preliminary Independent Evaluation Report	Legislative Report	October 1, 2023 – June 30, 2025	December 31, 2026
Annual CARE Act Report	Posted to DHCS internet website	July 1, 2025 – June 30, 2026	July 1, 2027
Annual CARE Act Report	Posted to DHCS internet website	July 1, 2026 – June 30, 2027	July 1, 2028
Final Independent Evaluation Report	Legislative Report	October 1, 2023 – June 30, 2027	December 31, 2028

*Los Angeles County opened their CARE Court on December 1, 2024, two months later than the seven Cohort 1 counties

CARE Act Early Implementation Report

- » The Early Implementation Report covers the first nine months, or three reporting periods, of CARE Implementation, October 1, 2023 through June 30, 2024.

Data Collection Period	Reporting Quarter
October 1, 2023 – December 31, 2023	Quarter 4 (Q4) 2023
January 1, 2024 – March 31, 2024	Quarter 1 (Q1) 2024
April 1, 2024 – June 30, 2024	Quarter 2 (Q2) 2024

- » Purpose: Summarize key data from courts to determine appropriate funding needs
 - Note: Outcome metrics, to measure impact of CARE Act, are not included in the report

First Annual CARE Act Report

- » The First Annual Report covers the first nine months, or three reporting periods, of CARE Implementation, October 1, 2023 through June 30, 2024.
- » Purpose: Provide insights into the early implementation efforts of the CARE Act
- » Data from the Annual Report will be leveraged to identify opportunities to improve upon implementation of the CARE Act
- » Data used to inform the Annual Report:
 - Judicial Council aggregate court data, by county
 - County BH individual level data, by county
 - Qualitative feedback on early implementation, data submission, and outcomes from key stakeholders
- » To be published to the DHCS website by July 1, 2025.

Legislative Updates

- » [Senate Bill \(SB\) 42](#): Amends provisions of the CARE Act, including referrals by facilities to County BH, communication between courts, alternatives to conservatorship, changes to CARE procedures and CARE agreements/plans, as well as collaboration on system performance.
- » [Senate Bill \(SB\) 1400](#)*: Amends provisions of the Penal Code related to CARE referrals of individuals deemed incompetent to stand trial and expands requirements for data reporting pursuant to CARE Act inquiries and referrals from other court programs.

*The bill requires DHCS, beginning in 2026, to include the additional data collected in its annual CARE Act report to be posted on the DHCS website (Effective January 1, 2025).

Overview of Proposed Data Dictionary Changes

- » **Petitioned Individuals:** Expands data reporting to include:
 - Outreach and engagement to petitioned individuals
 - Services provided during the CARE Initiation Period
 - Rationale for CARE petition dismissal, attestation on clinical stability
 - Provides clarification on existing data points
- » **CARE Inquiries:** Adds aggregate data collection and reporting requirements for inquiries about CARE to County BH
- » **System Referrals:** Adds individual-level data collection and reporting requirements for referrals made to County BH from misdemeanor proceedings, Assisted Outpatient Treatment proceedings, a facility, or a qualified mental health expert, if they believe that the individual meets or is likely to meet criteria to qualify for the CARE process.

Legislative Updates TTA

HMA will provide ongoing support to all 58 counties in navigating data collection and reporting and workflow changes to support legislative updates.

- » Live and asynchronous trainings
- » Open-Forum Discussions
- » Revised resources, including flowcharts, briefs, supplemental guides, etc.
- » 1:1 TTA and liaison support
- » Bi-Weekly Data Office Hours including specific office hours for SB 42 and SB 1400
- » Dedicated emails and TTA Request Forms for both program implementation and data teams
- » CARE Act Resource Center Data Collection & Reporting Library



Questions?

[CARE-Act.org](https://www.CARE-Act.org) | info@CARE-Act.org



HMA

System Pathways for Petitions

Essential Pathways

- County behavioral health, crisis teams, and contracted providers
- Hospitals and LPS Designated facilities
- Public Guardian / Public Conservator offices (for LPS diversions and step downs)
- Jail Mental Health (for pre-release transition planning)
- MIST and FIST diversions

Additional Pathways

- Families
- Homeless services providers and Shelters
- First Responders
- Public Defenders (supporting self-referral)
- Adult protective services
- Tribal courts
- Indian health services program or tribal behavioral health department

4. Public Comment

Public Comment

Public Comment will be taken on any item on the agenda

There are 2 ways to make comments:

1. Raise hand on zoom to speak. If joining by call-in, press *9 on the phone.
2. We encourage email comment to CAREAct@chhs.ca.gov

****Please limit comments to 2 minutes****

NOTE: members of the public who use translating technology will be given **additional time** .

5. Meeting Wrap Up and Next Steps

Information and Communication Tools

- [CARE Act Resource Center](#)
- [CARE Act Working Group Site](#)
- [Department of Health Care Services \(DHCS\) CARE Act Website](#)
- [Judicial Council of California \(JCC\) CARE Act Website](#)
(court forms and more)
- [CalHHS CARE Act website](#)
 - [Information for Petitioners Site](#)

Next Steps

- Ad hoc groups next meetings
 - Data Collection, Reporting, and Evaluation (December 11th, 1:30-3:00 – ongoing meetings on second Wednesday)
 - Services and Supports – With TTA/Comms (October 17th, 11:30-1:00 – ongoing meetings on third Thursday)
- CARE Act Working Group meets November 6th 10am – 3pm

NOTE: Ad hoc groups will not meet in May, August, or November (months with Working Group meetings)



Thank you!

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