

Standardized Assessment: Issues and Opportunities

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Our Mission and Vision

Mission: *To advance the development of a sustainable continuum of quality care for seniors.*

Vision: *A society where seniors receive medical treatment and human services that are integrated in the setting most appropriate to their needs and with the greatest likelihood of a healthy, independent life.*

Presentation Overview

- Introduction:
 - Universal Assessment: Definition, Terminology
 - California's assessment system and challenges
- Other States
 - Analysis of State Approaches
 - Key Lessons for California
- The Coordinated Care Initiative and Universal Assessment
 - Trailer Bill (SB 1036) Requirements
- Discussion: Pathways to Success

Definition and Terminology: Universal Assessment

Definition:

A common assessment tool or process to assess an individual's functional capacity and needs that is used across programs and services to guide care planning and resource utilization.

Terminology:

Also referred to as standardized assessment, uniform assessment, universal comprehensive assessment.

The Use and Value of Universal Assessment (UA)

Use of UA:

- UA is commonly used for eligibility determination, service and support planning, resource allocation, and quality monitoring.
- UA is often used in an automated system (like CMIPS for IHSS)

Value of UA:

- Streamlines the assessment process
- Integrates the care planning process in a consistent manner
- System automation leads to informed policy and planning decisions and allows for efficient allocation of resources.

California's Assessment System

Assessment in California:

- Assessment varies by program
- There is no standardized assessment system across LTSS programs
- Consumers who may be eligible for multiple programs must be evaluated separately by each program for eligibility and for care planning purposes.

Other States

- More than half of all states use universal assessment tool for at least a component of the population
- Many states have designed automated universal assessments for multiple populations and programs to:
 - Evaluate individual need in a consistent manner across programs and develop care plans
 - Allow for more equitable resource allocation and the collection of standardized data for use in program planning, budgeting, quality monitoring, reporting and rate setting.

Analysis of State Approaches

- The SCAN Foundation supported C.E. Reed and Associates to analyze the evolution of universal assessment in four states: Washington, Minnesota, Arkansas, and New York
- Focus of report:
 - What these states implemented universal assessment
 - Which assessments were selected and why
 - How they engaged stakeholders through the development, testing, and implementation phases
 - How long did the process take, the associated costs, and what efficiencies were achieved

What We Learned

- Critical role of stakeholder engagement
- Length of time needed: 3 years minimum
- Resources to design and implement universal assessment varied from \$1.4 million to \$4.8 million (this does not reflect total cost)
- States anticipate greater efficiencies through elimination of multiple forms and assessments, better flow of information, and consistent eligibility determination

Exploring Opportunities

California's Coordinated Care Initiative and
Universal Assessment

Coordinated Care Initiative (CCI)

Universal Assessment in the CCI (as outlined in SB 1036):

- State “intent” to pursue a universal assessment to be implemented across Medi-Cal managed care organizations
- Counties continue using IHSS assessment and authorization
- Stakeholder process to begin no sooner than June 2013
- Tool will build upon IHSS uniform assessment process
- Upon completion, tool will be piloted in two CCI counties no sooner than January 2015
- Consumer consent required
- Sunset 2017

Recommendations for California

- Consider building assessment into an “off-the-shelf” tested tool
- Stakeholder process should provide for meaningful engagement
- Sufficient time should be built into the process
- Desired quality outcomes should be identified and translated into measures outlined in the assessment
- System automation is critical to capturing data and fully testing value of piloted assessment

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