

*Introduction of Design
Team to assist with
development of the
Universal Assessment*



The University of California Los Angeles Borun Center
for Gerontological Research

March 14, 2014

Diverse Team

University of California

Borun Center staff:

- Debra Saliba, MD, MPH
- Kisa Fulbright, BS
- Jessica Crocker, BS
- Erika Ramirez

UCSF staff:

- Robert Newcomer, PhD

University of Southern California

- Kate Wilber, PhD
- Natalie Leland, PhD
- Zach Gassoumis, PhD
- Deborah Newquist, PhD, MSW
- Barbara Gage, PhD
- 4 Graduate Students

Consultants

- Trudy Mallinson, PhD, MS

Guiding Principles

- Build on California's unique programs, size and diversity
- Consider key goals/values
 - Person centered processes and items
 - View assessments as strength based
 - Support care planning focused on independent living in the community
 - Not adversely impact current recipients
- Based Universal Assessment on collaborative input from stakeholders

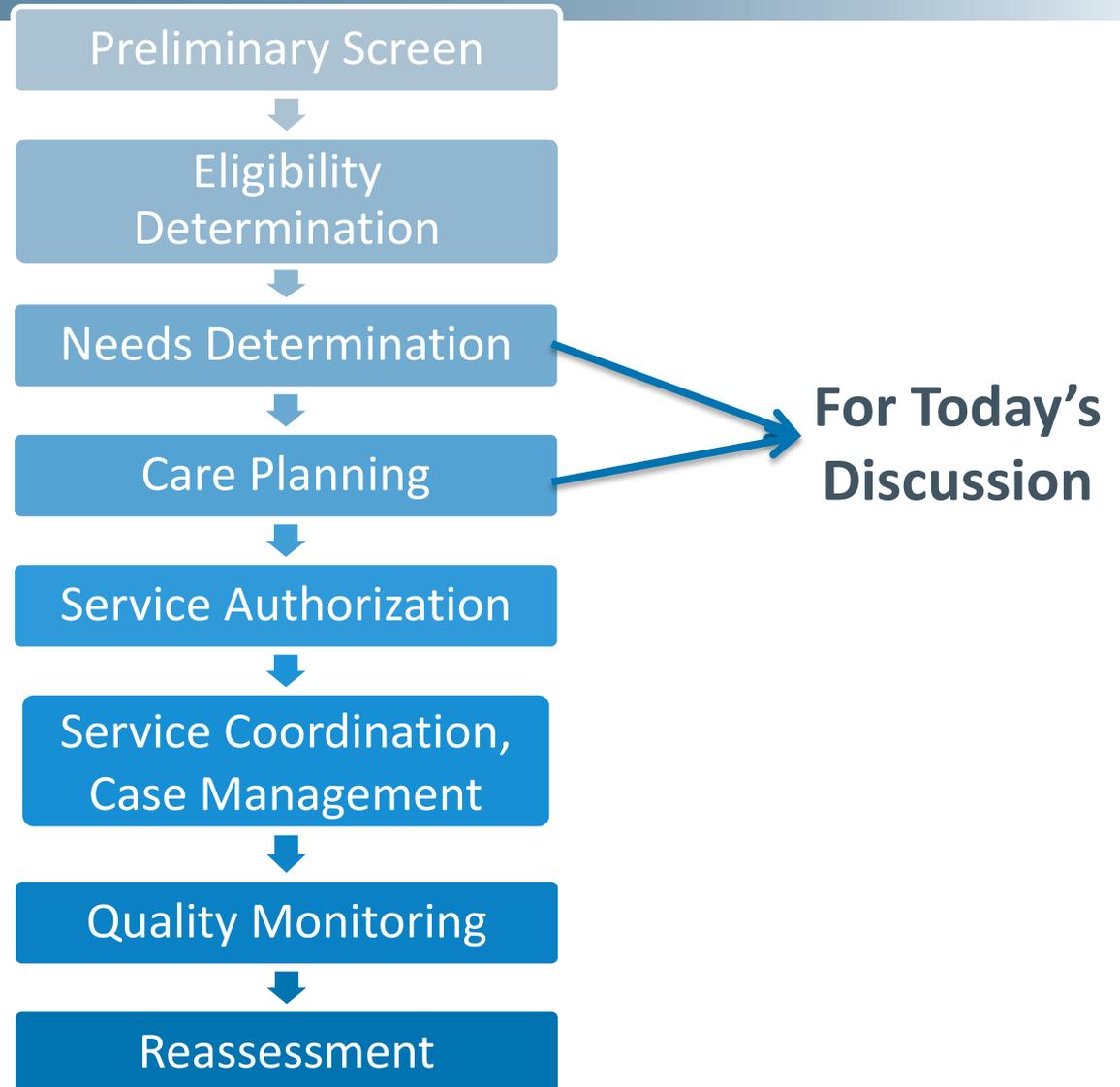
*Exploring Domains for
California's Universal
Assessment*



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Components of Comprehensive Assessment



Components of Comprehensive Assessment

- Needs Determination
 - Identification of specific service needs. Sometimes referred to as “clinical eligibility determination.”
- Care Planning
 - Development of a plan of service delivery that takes into account an individual's needs and goals of care, existing sources of care and support, and resources available through a range of formal programs and informal supports.

Terms Defined

- **Domain:** broad area
 - e.g. Functional Status
- **Topic:** focus within the domain
 - e.g. Mobility
- **Item:** specific question and response choices
 - e.g. Ability to walk across the room

Standards Identified

- Balancing Incentive Program (BIP) Manual (2011)
- Case Management Society of America (CMSA), Standards of Practice for Case Management (2010)
- National Association of Social Workers (NASW), Standards for Social Work Practice (2005)
- American Medical Association (AMA) and American Academy of Home Care Physicians (AAHCP) Guidelines (2012)
- Program of All-Inclusive Care for the Elderly (PACE) Manual (2011)

Nine Domains Identified

- Background
- Financial
- Health
- Function
- Cognitive/social/
emotional/behavioral
- Goals and preferences
- Environment
- Caregiver
- Other

 **Topics!**

Goals/Values to Consider

- Person centered processes and items
- View assessments as strength based
- Support care planning focused on independent living in the community
- Not adversely impact current recipients
 - Burden
 - Equity
- **Are there any additional goals/values?**
- **What is optimal length?**

Other Considerations for Today's Work

- Don't worry about topic location
 - Domains are only an organizing tool
- UA Development will be an iterative process
- Not a vote!

*Next Steps in Universal
Assessment (UA) Tool and
Process Development*



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Items Will Have Two Draft Sections

- HCBS-CIS (Core Item Set)
 - IHSS
 - MSSP
 - CBAS
- Supplemental

How Do We Get There?

- Iterative process
 - Item matrices
 - Stakeholder input
 - Pretesting

Item Matrices

- Items drawn from external standards, comparator state assessments, and current California assessments
- Review published literature for item performance
 - Validity
 - Reliability
- Current Use

Stakeholder Subcommittees for Item Vetting

- Background/resources
- Health
- Functional Assessment/goals and preferences
- Cognitive/social/emotional/behavioral
- Environment/Caregiver
- Processes to enhance person-centered care planning

Subcommittees for Item Vetting (continued)

- 7-10 members
- Diverse perspectives with a variety of categories/roles. Examples include:
 - » Consumers
 - » Expertise in domain
 - » Program administration/leadership
 - » Experience conducting in-home assessment
 - » Persons expected to do care planning (case managers/health plan providers)
- Also aim for geographic diversity, represent consumer groups

Subcommittee Retreat

- Current recommend two 6-hour days
 - Break-outs
 - Cross-reporting large group
- Will we be able to identify the desired range of participants who are able to make commitment?

Pre-Testing of Draft Instrument

- Testing for clarity
- Testing for agreement

UA Process Considerations

- Goal: UA will have a positive and non-disruptive effect
 - Who will use the assessments?
 - How will it be used?
 - What resources are needed, available, and affected?
 - Integration with CMIPS II
- Recommendations for demonstration testing