Magellan Healthcare of Idaho

Outcomes and Assessments System – Adding, updating, and reviewing CANS assessments

Overview

One of the primary features of Magellan's outcomes and assessments system (accessed via Availity Essentials) is the coordinated ability to complete assessments. Assessments refer to each time someone completes a questionnaire for a member, or each time the member is assessed. The Idaho Child & Adolescent Needs & Strengths (CANS) 3.0 is an assessment in the outcomes and assessments system that can be seen (read) by all system users but requires the user to be actively CANS-certified to submit or approve a CANS. A user without certification can submit (write) a CANS if they are assigned a reviewer who will approve the CANS upon submission. A user with CANS certification has the role of "Praed," which the agency organizational administrator can grant based on the TCOM Training CANS certification date and expiration date. This step-by-step guide presents the steps for users to add a CANS assessment, for Praed users to review the assessment for approval or return, and for users to modify or update the assessment if needed.

Roles and responsibilities

- **Users** – Add assessments for members and submit to a Praed user for review. If the Praed user returns an assessment, users make any necessary modifications to the assessment, and resubmit to the supervisor.
- **Praed users** – Review the assessments submitted by system users and approve or return the assessment.

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Locate the member

Use the steps found in the Searching for a Member Step-By-Step Guide on the Outcomes and Assessments Training page to locate the individual member.

## Adding a CANS assessment – user

1. From the member's profile, click the **Assessment Templates** tab.
2. Click the radio button next to the Idaho Child & Adolescent Needs & Strengths 3.0 assessment.
3. Click the **ADD** button.
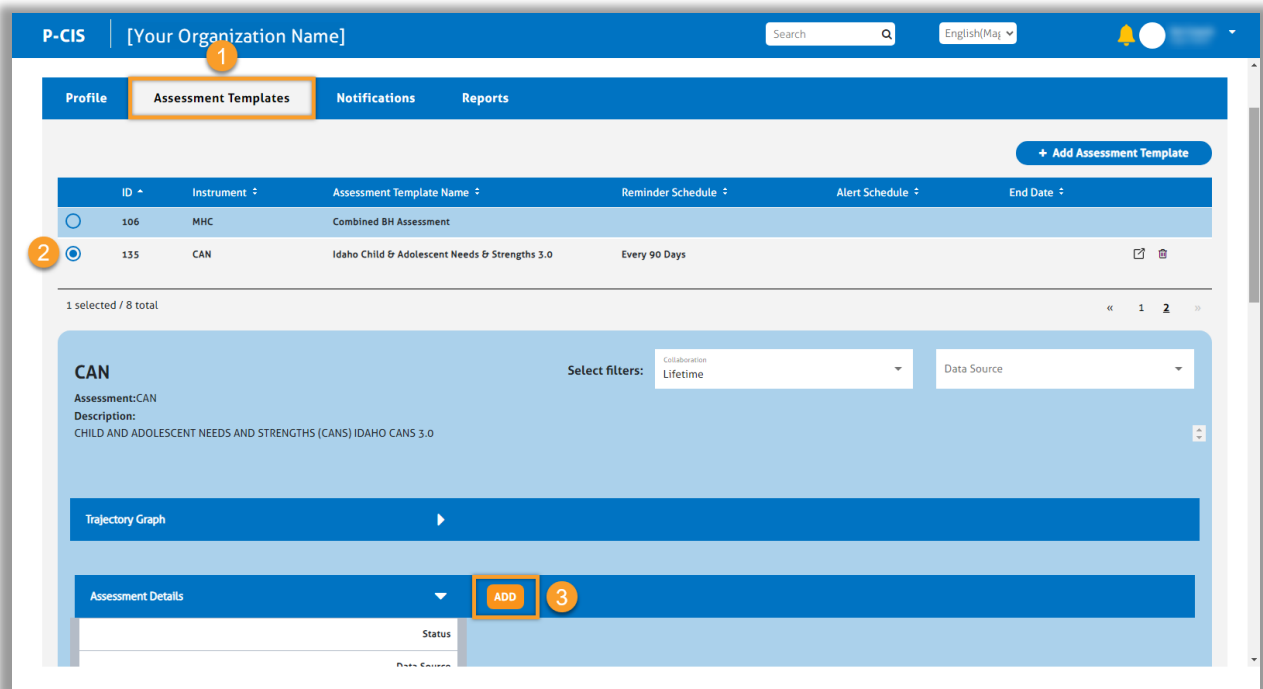
4. Complete the fields of the Add New Assessment screen.
    A. **Date** – Auto populates to the **current date** and can be changed if needed.
    B. **Data Source** – The CANS is a Communimetric Tool. Select **Communimetric**.
    C. **Reason** – Select the appropriate option from the list below:
        1) Initial
        2) Discharge
        3) Review/Re-assessment
        4) Triggering Event
            NOTE: If Triggering Event is selected as the reason, additional required fields will populate for **Event Date** and **Event Notes**.
    D. **Notes** – Optional and can be used to provide additional information as needed.

5. Establish the assessment in the system by selecting one of the following options:
    A. **Start Blank** – Will start a new CANS assessment from scratch.
    B. **Copy Previous** – Will log a new CANS assessment with previous responses included in the most recent version of the assessment.
        NOTE: If this is an initial assessment, you will not have this option.
    C. **Invite to Complete** – As a communimetric tool, this is not an option.
        NOTE: This option is disabled, as indicated by a lighter blue shading, for assessments, such as the CANS, which use **Communimetric** as the Data Source.
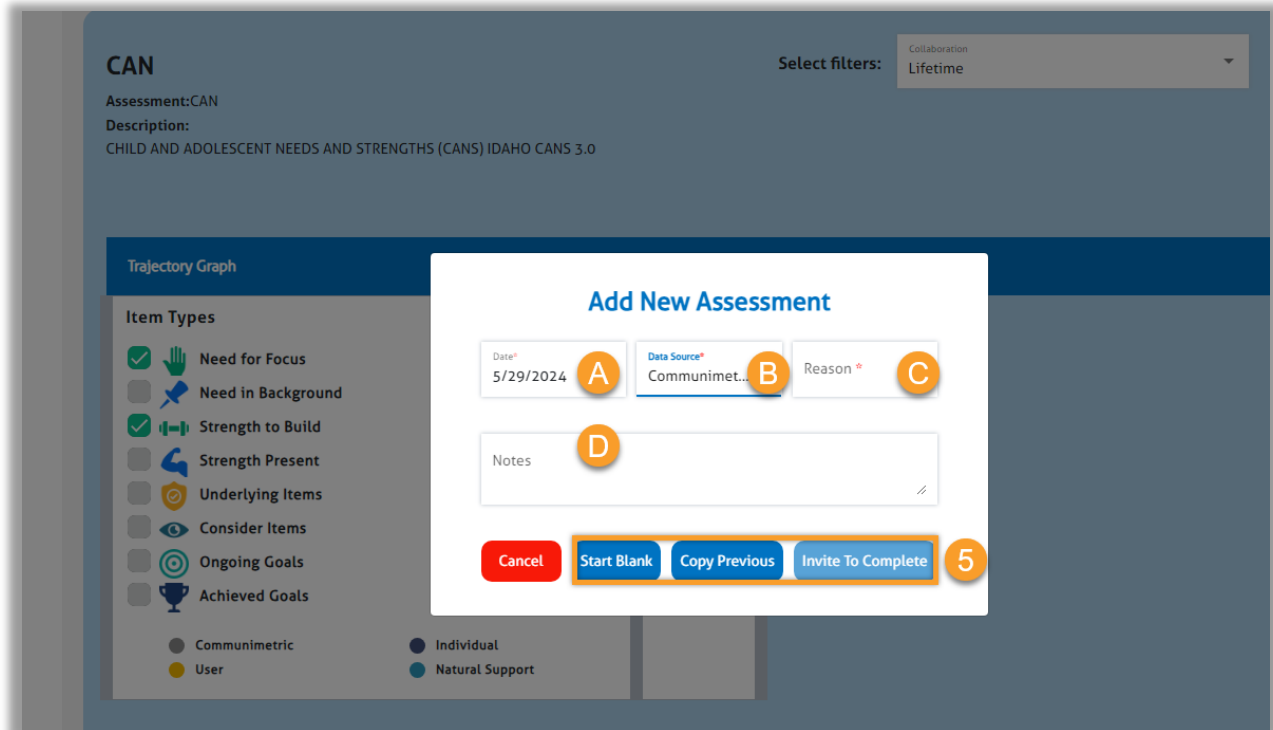
6. Complete the fields of the assessment following the Idaho CANS 3.0 Reference Guide as required and applicable.
    NOTE: You can navigate through the assessment by selecting the appropriate responses from the drop-down for each question or by using the number pad on your keyboard. Additionally, see the TCOM COE training site for additional information on the CANS and other Total Collaborative Outcomes Management (TCOM) tools.
    A. Item scores are 0, 1, 2, 3 which can be keyed in using your number pad as **0, 1, 2, or 3**.
    B. Items which are age-dependent, such as Vocational (Ages 14+), have N/A as an option. This can be keyed in as **9** for N/A.
    C. The Traumatic/Adverse Child Experience section uses Y/N responses. This can be keyed in using **1** for **Yes**, and **0** for **No**.
    D. For the Transition Age Youth Domain (Age 16+) section, select **Yes** for youth ages 16 and older to complete the transition age items.

E. When completing the Caregiver Resources and Needs Domain, if the youth has a "viable caregiver," select **Yes** and type in the name of the caregiver(s) being rated and the relationship to the youth, and complete the remaining fields.
    NOTE: For the definition of a "viable caregiver," refer to the Reference Manual on the TCOM COE training site (linked above).

F. Level of Tier will be calculated upon submission of the assessment.

G. High Fidelity Wraparound Consideration will be calculated upon submission of the assessment.

7. While completing the assessment, you can change the view of the assessment as desired by toggling the **+/- slider** next to each view.
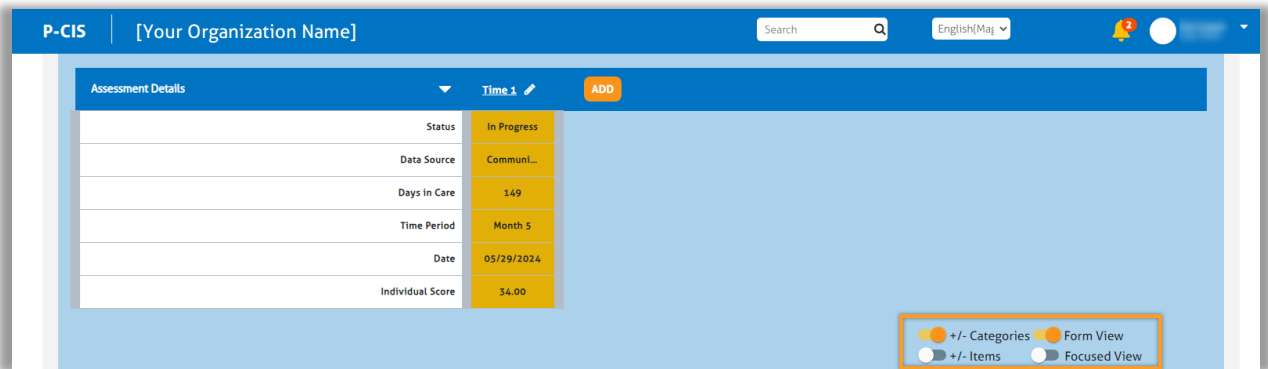
A. **Categories** – Shows the sections within the assessment. In this view, you can use the number pad on your keyboard, and the Outcomes and Assessments System will automatically move you to the next question once you input a response.
    NOTE: While in **Categories** view, you can click the **+/-** next to any individual item to view more details, including description, anchor definition, and considerations.

B. **Items** – Shows each item within each category, including description, anchor definition and considerations.

C. **Form View** – Shows a drop-down for a score, with anchor definition.

D. **Focused View** – Shows a category view of all strengths items and needs items scoring a 1, 2 or 3.

8. As you complete the assessment, be sure the Time column is highlighted as this will let you know the assessment is in edit mode.

9. When done, click the **Save** button.
10. Choose the appropriate option for how you would like to proceed with the assessment.
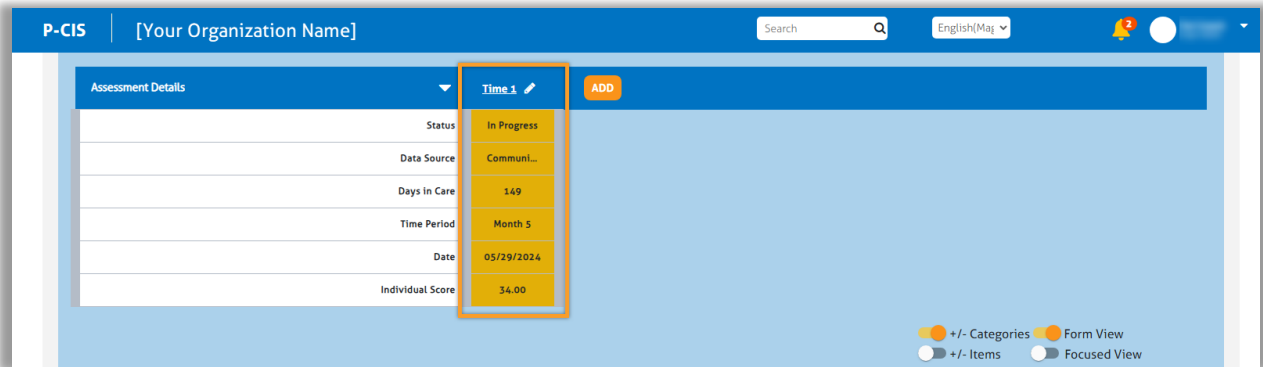   **NOTE:** The options you see after clicking the **Save** button will depend on your role. Praed certified users will have the following three options: Submit & Approve, Save & Close, and Save & Continue. All other users will have the following three options: Submit, Save & Close, and Save & Continue.
    A. **Submit & Approve** – Means you are submitting the CANS as **final**. You can no longer edit/modify this CANS. You can generate a report on this CANS.
       NOTE: Only Praed users will have the Submit & Approve option.
    B. **Submit** – Means you are submitting the assessment as **final**. A Praed user will need to review and approve the assessment to finalize it. You can no longer edit/modify this CANS unless the reviewer returns the CANS with comments for edits and re-submission. You cannot generate a report on this CANS until the reviewer has approved it.
       NOTE: Only non-Praed users will have the Submit option.
    C. **Save & Close** – Will save your current progress but will close out the assessment. You can then come back to it if you need to and change/modify any assessment details/answers before submitting it as final.
    D. **Save & Continue** – Will save your current progress and allow you to keep working on the assessment. You can always Save & Close and come back later as well. If you select this option, you can still modify any assessment information before submitting it as final.
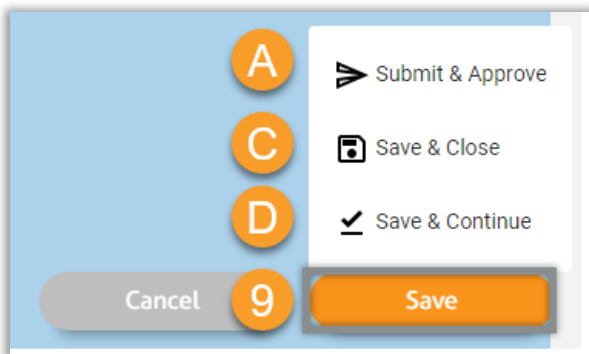
11. If you are a Praed (CANS-certified) user, skip to the *Available CANS reports* section.
12. For non-Praed users, once you submit the assessment, it will route to a Praed user/supervisor for review.
13. Did the supervisor approve the assessment?
    A. If yes, no further action is needed.
    B. If no, proceed to the *Modifying an assessment that has been returned* section.

Reviewing an assessment – Praed user

CANS assessments submitted via the outcomes and assessments system will be automatically approved when submitted by users with a Praed role. However, CANS assessments submitted by users who are not Praed/CANS-certified will need to be reviewed by Praed users.

1. Once a user submits an assessment, you will receive a notification to review.
2. You can access notifications from two locations:
    A. The **bell icon** on the blue toolbar at the top right of any screen within the system.
    B. The **Notifications** table on the Dashboard. Clicking **View All** will take you to a full list of all notifications.
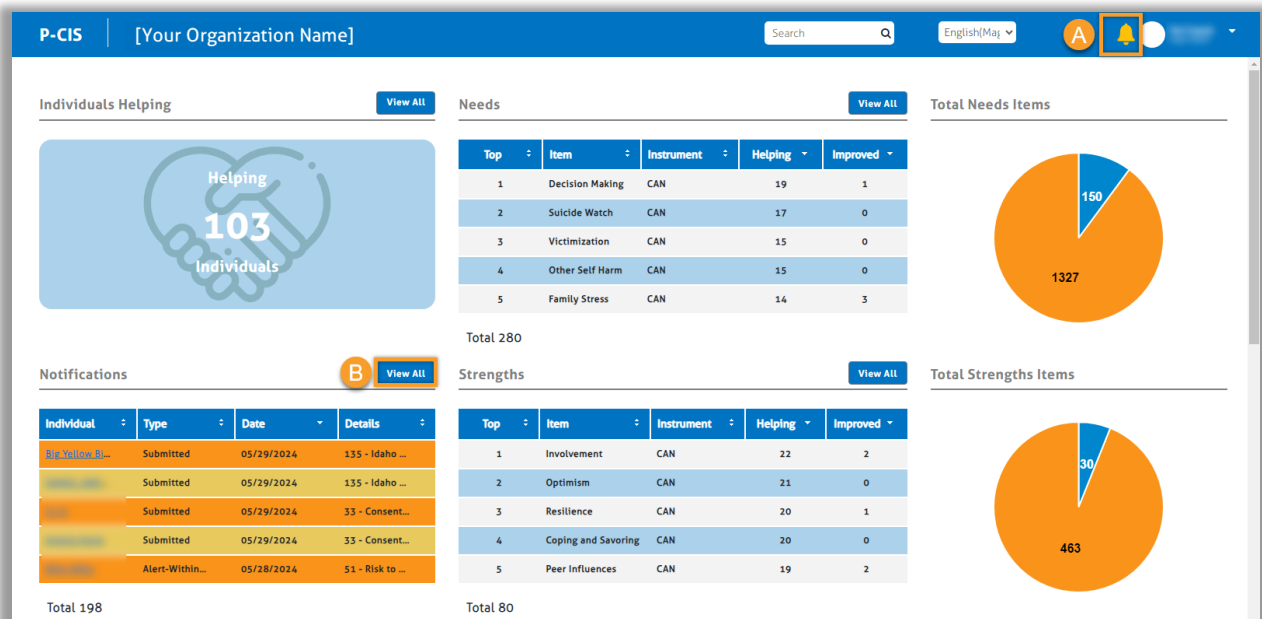
3. Clicking either the **bell icon** or the **View All** button from the Notifications table will take you to the Notifications screen.
    A. All assessments currently needing review will be listed under the **Current Active Notifications** table.
    B. All assessments that have been previously reviewed will be listed under the **Past Notifications** table.
4. Click the individual's hyperlinked name within Notifications to navigate to the assessment that requires review.
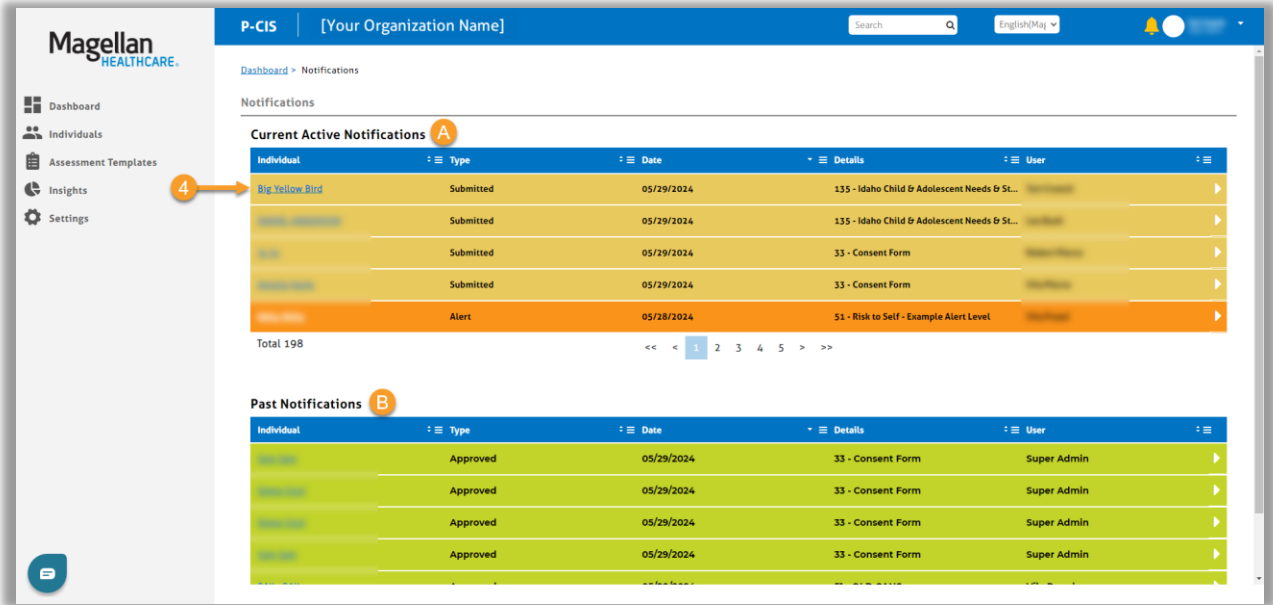
5. Within the assessment, click the **Review** hyperlink under the appropriate time column.
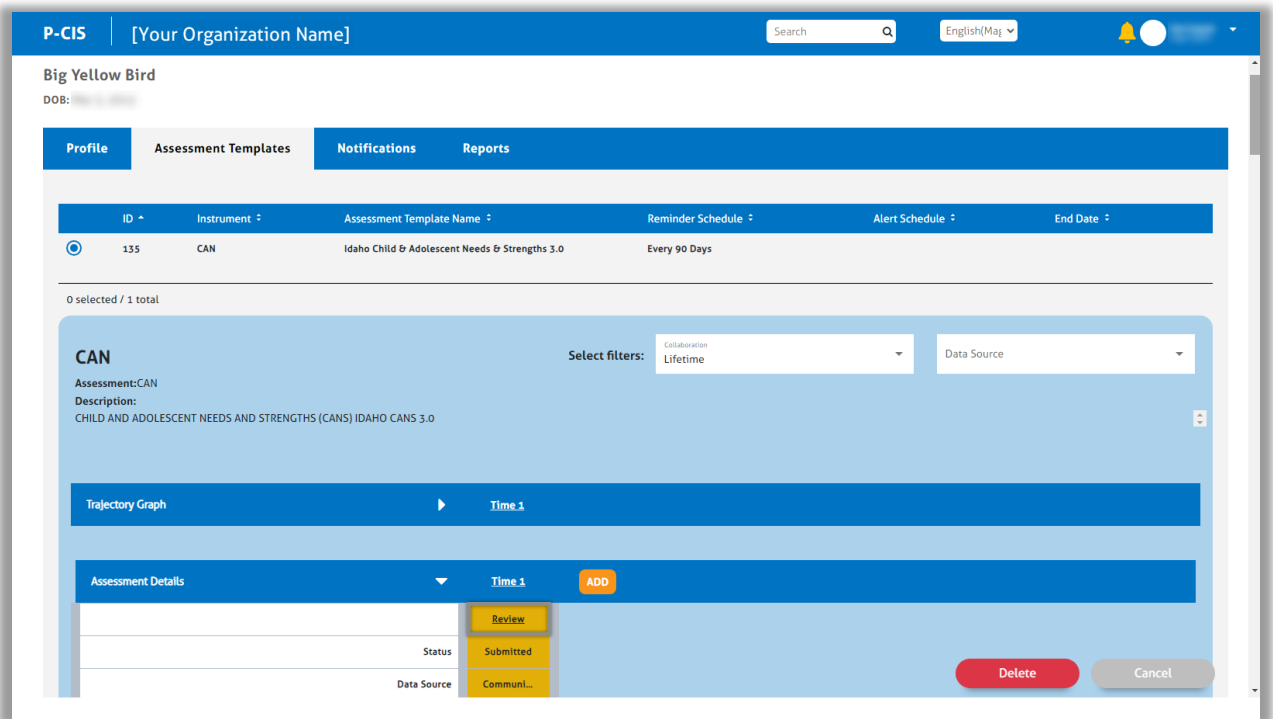

6. Review the assessment, using the caret(s) ▶ on the right side of the page to expand the section(s) of the assessment as needed.
7. Use the **Notes** field at the bottom of the Review screen to provide any relevant notes for the user, if needed.
8. When done reviewing, choose how to proceed:
   A. **Approve** – Indicates no modifications are needed for the assessment.

B. **Return** – Should be used if anything requires modification within the assessment. This sends a notification to the user that the assessment was "Returned." Upon completing the necessary modifications, the user submits the assessment for review again, and the process repeats.

   1) If you select **Return**, you will see a Confirm Return window asking: "Do you want to return the assessment?" Click **Yes**.
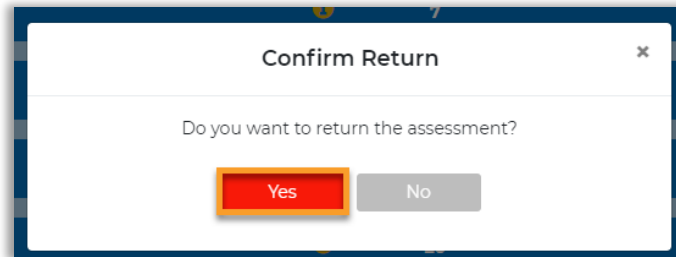
C. **Cancel** – Cancels the review but does not remove the notification.
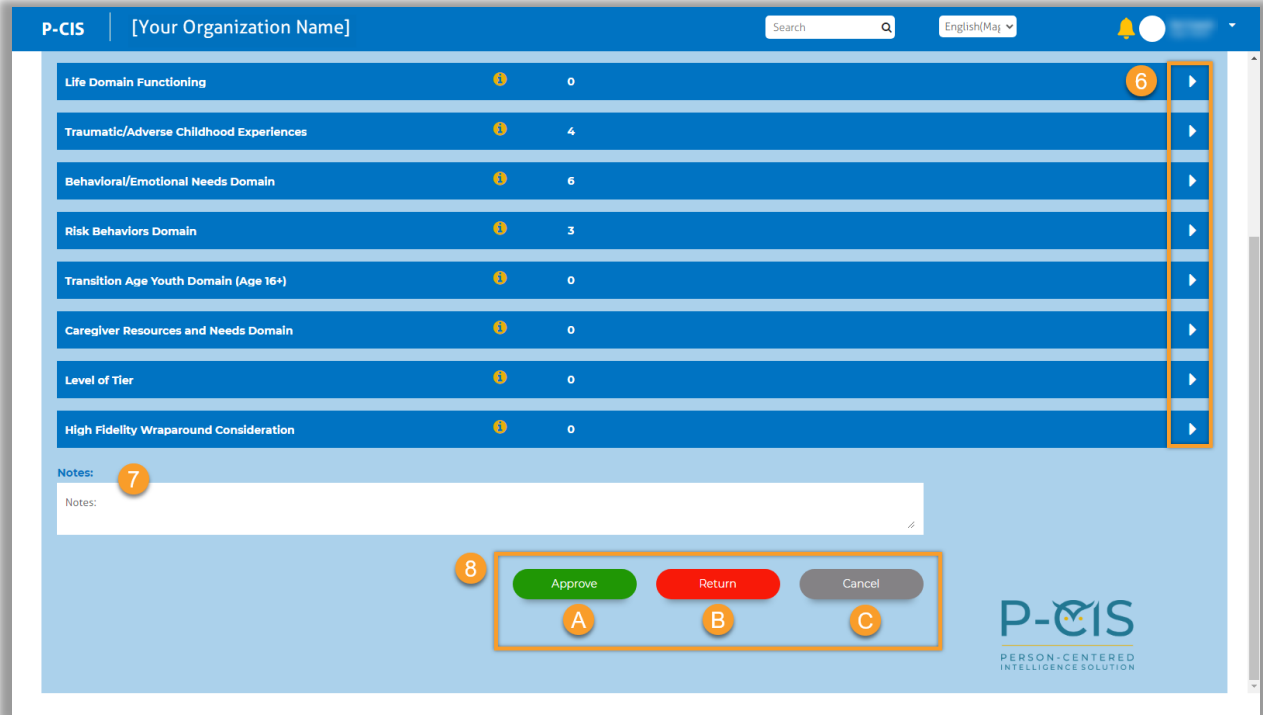
Modifying an assessment that has been returned – user

When Praed users review an assessment prior to approving it, there may be situations where the Praed user recommends modifications to the assessment before approving it. In these situations, the Praed user returns the assessment to the user that created it to make those updates prior to returning for review.

1. You will receive a notification to modify the assessment.

2. View notifications by clicking the **bell icon** on the blue toolbar at the top right of any screen within the system or from the P-CIS Dashboard.
3. On the Dashboard **Notifications table**, you can also click **View All** to expand all notifications and view additional details.
4. Click the individual's hyperlinked name within Notifications to navigate to the assessment that has been returned.

5. Scroll down to view the assessment that has been returned. The highlighted time column of the returned assessment indicates the assessment is ready for editing.
6. Make any modifications as needed to the assessment.
7. Once done, click **Save**.
8. Select **Submit**.

9. This sends the assessment back for review.
10. Complete *steps 1-7* as many times as needed for returned assessments.

Generating CANS reports

Upon completion of CANS assessments within the outcomes and assessments system, you may want to generate reports for internal use and/or to share with families, care teams, or the members within care. There are several options available for reports, including:

1. Dashboard view for progress (trajectory)
2. Story Map
3. Item Detail Report
4. Family Report
   A. Individual Strengths Report
   B. Individual Needs Report
5. Standard (Additional) Reports

The Dashboard view for progress (trajectory chart) can be viewed within the Assessment Templates tab in the member's profile, whereas all others can be viewed within the Reports tab. The next section will review each of the different reports available as well as the information that can be found within them.

Dashboard view for progress (trajectory)
1. In the Assessments section, the Trajectory Graph shows overall progress. The default view includes the **Need for Focus** (Action Needs) and **Strength to Build** (Actionable Strengths).
2. The view can be changed by instead selecting **Item Types** such as **Strength Present** to show increasing strengths.
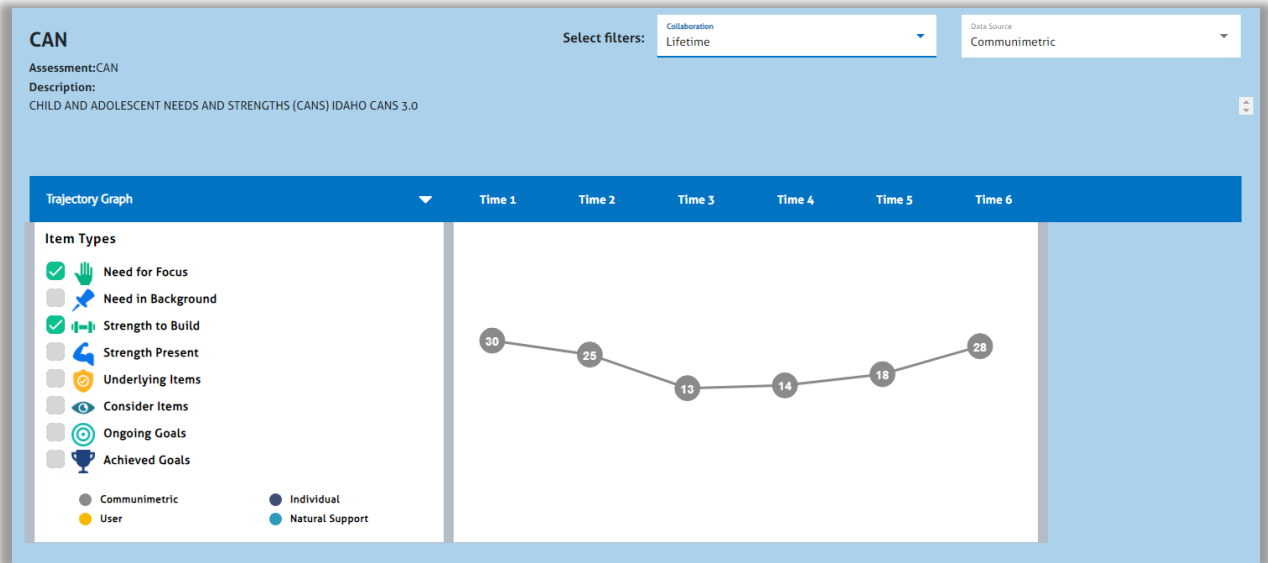
Story Map

1. In the Reports section, the **Story Map** shows a snapshot of the member's needs and strengths.
2. The **Select a Time** selection will default to the most recent and can be changed using the drop-down to a previous time.
3. Items within the **Needs for Focus** can move up and down depending on priority. You can drag and drop items to arrange priorities.
4. The Story Map view can be snipped or captured via a screenshot but does not have a PDF print option.

5. At the bottom of the Story Map is a **Narrative** to describe what is seen in the map. This narrative can be copied and placed in a text-based report.


Item Detail Report

1. In the Reports section, the **Item Detail Report** is a drill-down into a single item over time.

2. Click the **caret** ▶ next to a section to expand and see the subcategories within that section.
3. If applicable, click the **caret** ▶ next to the selected subcategory to see specific items and their scores.
4. The Item Detail Report can be snipped or captured via a screenshot but does not have a PDF print option.
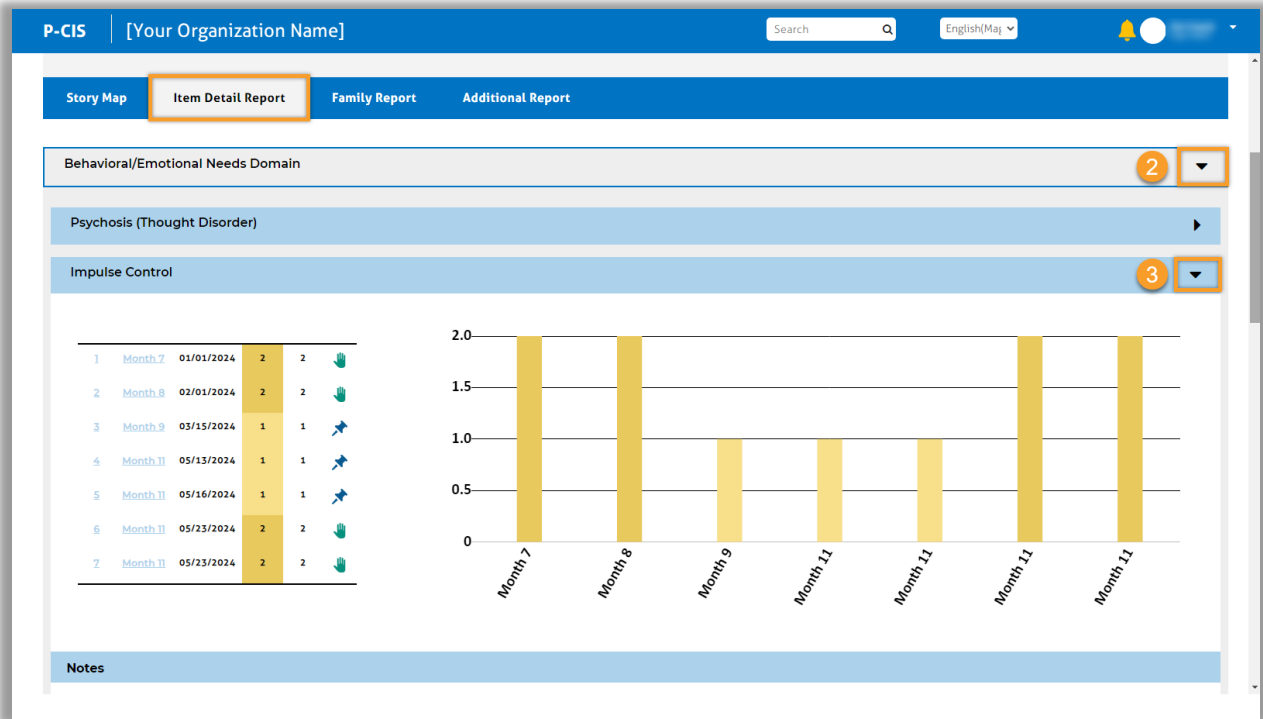
Family Report

1. In the Reports section, the **Family Report** allows you to generate PDF family reports for sharing with the family and youth.
2. There are two types of Family Reports available for the CANS: an Individual Strengths Report and an Individual Needs Report.

Individual Strengths Report

1. To generate this report, click the **Family Report** tab.
2. Click the **Individual Strengths Report** hyperlink.
3. To print the report, click **Download Report**.
4. At the top of the report is a narrative to describe the report to the family, and bar graphs with a summary count of strengths over time.

5. The body of the report displays each strengths item with the rating and an icon for strengths to use and strengths to build. This is a useful skill building perspective on strengths. The icons used include the following:
    A. The flower bud icon indicates strengths to build.
    B. The flower bloom icon indicates strengths to use.

Latest Progress

Strength	Previous 3/15/2024	Latest 5/13/2024	Description
Family Strengths	A 1 🌿	B 0 🌻	This item refers to the presence of a sense of family identity as well as love and communication among family members. Even families who are struggling often have a firm foundation that consists of a positive sense of family and strong underlying love and commitment to each other. These are the constructs this strength is intended to identify. As with Family Functioning, the definition of family comes from the child/youth's perspective (i.e., who the child/youth describes as their family). If this information is not known, then we recommend a definition of family that includes biological/ adoptive relatives and their significant others with whom the child/youth is still in contact.
Interpersonal	1 🌿	1 🌿	This item is used to identify a child/youth's social and relationship skills. Interpersonal skills are rated independently of Social Functioning because a child/youth can have social skills but still struggle in their relationships at a particular point in time. This strength indicates an ability to make and maintain long-standing relationships.

6. The bottom of the report includes the following:
    A. A count of **Strengths to Use** for celebration.
    B. The number of **Strengths to Build**.
    C. A **Key** for the icons seen throughout the Individual Strengths Report.
    D. Any **Notes** on the strengths items.

A Strengths to Use

🏅 5

_____ has 5 strengths to use. Celebrate the strengths!

B Strengths to Build

10

_____ has 10 strengths to build.

C Key

🌻	Strength to Use
🌿	Strength to Build

D

Notes

These notes are specific to _____ .They describe the progress made in building and using strengths overtime.

Month 8, 2/1/2024

Interpersonal
_____ personality and social skills has come out more as he feels less depressed

Month 11, 5/16/2024

Family Strengths
Aunt has moved in

Individual Needs Report

1. To generate this report, click the **Family Report** tab.
2. Click **Individual Needs Report** hyperlink.
3. To print the report, click **Download Report**.
4. At the top is a narrative to describe the report to the family.

5. The body of the report displays each needs item with a rating and an icon for needs. This is a useful skill building perspective on needs. The icons used include the following:
   A. **Goal Reached** – flower bloom for a rating of 0.
   B. **Needs in Background** – flower bud for a rating of 1.
   C. **Need for Focus** – watering can for actionable needs.

6. The bottom of the report includes the following:
   A. A count of **Goals Reached** for celebration.
   B. The number of **Needs in Progress**.

C. A **Key** for the icons seen throughout the Individual Needs Report.

D. Any **Notes** on the needs items.

Standard (Additional) Reports

1. The Standard CANS report is found under the **Additional Report** tab with all the PDF reports.

2. In the **Collaboration** field, you can select a specific provider or **Lifetime** for all providers.

3. Select **Communimetric** as the data source.

4. If there is more than one assessment instrument, select the CANS.

5. Click the **Idaho Child & Adolescent Needs & Strengths CANS** hyperlink to view the report.
   NOTE: The report may take a moment to load.

6. The default view will show the most recent CANS.

   A. To change to another date, use the **Time** drop-down to select the date to view.

   B. Click **View Report**. The CANS view will change to the selected date.
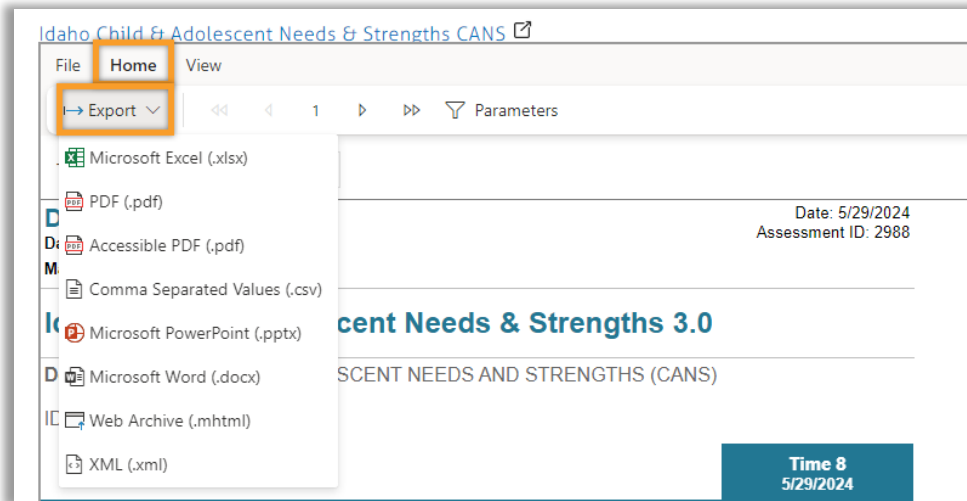
7. To print the report, select **File**.
8. Select **Print**.
9. A pop-up window appears for the print information. Select the dimensions for the document as well as the orientation. When done, click **Print**. A new file will generate for print-to-PDF, or to print to paper.
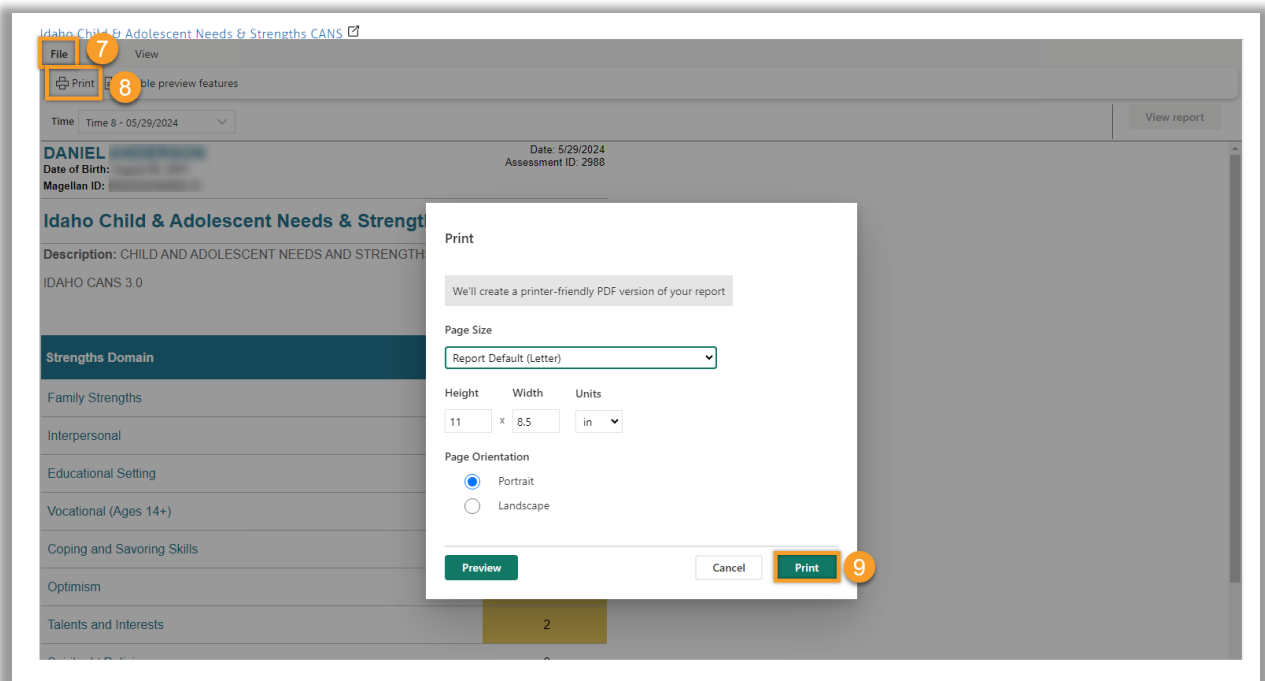
10. If you select **Home** followed by **Export**, there are various document types listed. However, only the **Print** option under **File** (as previously discussed) will provide the full CANS.

11. The PDF view will include identifiers, the date and the score for each item.

12. At the end of the CANS report are the decision support algorithms.
    A. The Tiers for 0, 1, 2, and 3 match the Idaho Youth Empowerment Services (YES) Tier definitions.

B. The **High Fidelity Wraparound Consideration** is the decision support for Idaho Wraparound Intensive Services (IWInS) or Idaho's High Fidelity Wraparound (HFW).

1) If the youth displays as **Consider HFW**, there should be discussion with the family on HFW. The family may choose to continue with other services. If the youth display as **N/A** and the family is interested in wraparound, the youth can still be referred for wraparound.

Sharing a CANS with another provider

1. To share a CANS with another provider, you can use a Magellan AUD consent form to share within Magellan's outcomes and assessments system.
2. Either you or the second provider can obtain consent from the member or guardian using the AUD consent form in the outcomes and assessments system. See the Adding a Member to a Caseload Step-by-Step Guide on the Outcomes and Assessments Training page for more information.
3. With consent, a provider can view a CANS created by another provider as well as use the copy feature to update a new CANS.
4. Alternately, you may use your own consent form and send the printed standard CANS report.