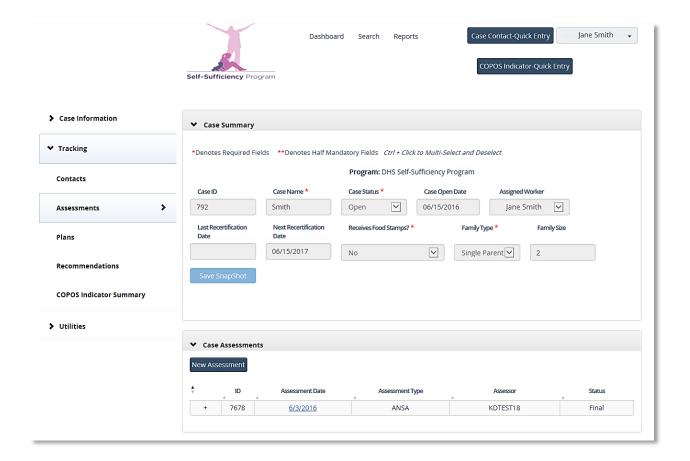# Case - Assessments – ANSA – DHSSSP Job Aid

The *Assessments* screen allows users to view and document Assessments. Currently the ANSA is the only Assessment in DHSSSP. Information from the Assessments can be imported into the Case Plan.
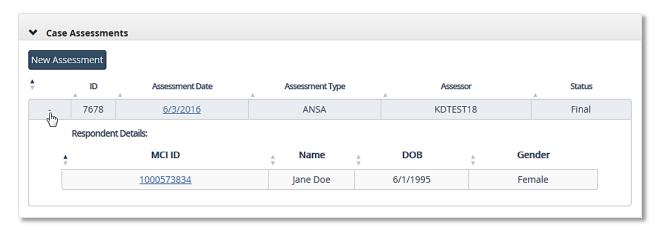
Assessments screen

Navigation

1. Bring the Case into focus and navigate to [❤ Tracking] → [Assessments ❯].

Case Assessments grid

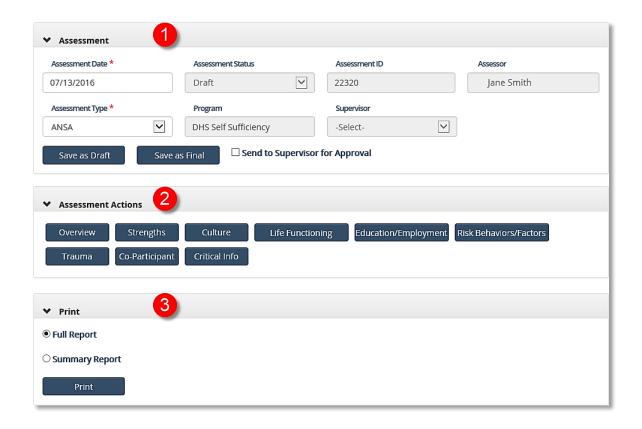1. The [∨ Case Assessments] pane contains a grid with all of the Assessments on the Case:

a. The *Respondent Details* for an ANSA Assessment can be viewed by clicking the [+] to the left of the *Assessment ID* in the *Case Assessments* grid. Clicking the [-] will close the *Respondent Details*.

b. To view an Assessment, click on the *Assessment Date* in the *Case Assessments* grid.

c. Click [New Assessment] to start a New Assessment.

Assessment Basics

1. The ratings from the last Assessment will carry over to the next Assessment if the last Assessment was completed less than 8 months ago.

2. The Rating Definitions will be listed at the top of each section.

3. Hovering the mouse over a selected radio button [◉] will display the rating definition for that number.

4. Some ratings will cause additional sections of the Assessment to open up.

5. Some ratings require a Justification to be entered in the narrative box. If a Justification for the rating is required a red asterisk [*] will appear to the right of the narrative box.

6. Save each section before navigating to another section. If the section has saved successfully an "**Information saved successfully.**" message will appear.

7. Rating an item as "Explore" means that there is not enough information currently to accurate rate that item.

Navigating through the ANSA Assessment

1. The ⌄ Assessment pane contains some basic information about the Assessment. This is also where the Assessment is saved and sent for approval (if required).
   a. *Assessment Date*: Defaults to today's date but can be edited.
   b. *Assessment Status*: Displays the current approval/finalized status for this Assessment.
   c. *Assessment ID*: This is the ID assigned to this Assessment by the Synergy system.
   d. *Assessor*: Displays the name of the user who completed the Assessment.
   e. *Assessment Type*: This drop-down contains all of the DHSSSP Assessments.
   f. *Program*: Displays the Synergy program where the Assessment was created.
   g. *Supervisor*: If the ☑ *Send to Supervisor for Approval* checkbox is checked this drop-down is enabled. The user can then select the name of their Supervisor and click **Save as Final** to send the Assessment for Approval and Finalization.
   h. **Save as Draft** and **Save as Final**:
      i. Click **Save as Draft** to save the Assessment prior to Approval/Finalization.
      ii. Click **Save as Final** to Finalize the Assessment. Finalization will lock this Assessment against any further editing.
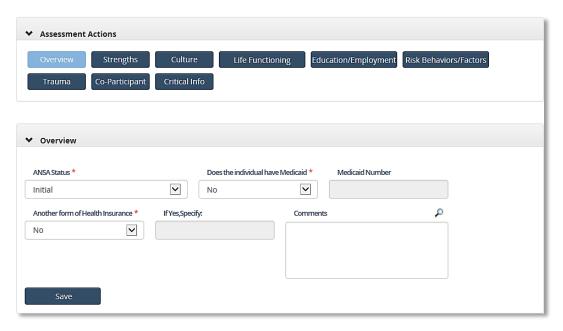
2. The **⌄ Assessment Actions** pane contains all of the navigation buttons for the Assessment. Clicking on a button will open that section of the Assessment for viewing or editing. Note that the **⌄ Assessment** pane must be saved using the **Save as Draft** button before the **⌄ Assessment Actions** pane can become active.

3. The **⌄ Print** pane allows the user to generate a printable PDF version of the Assessment.
    a. Select the *Full Report* or the *Summary Report* using the radio buttons to the left of the Report options.
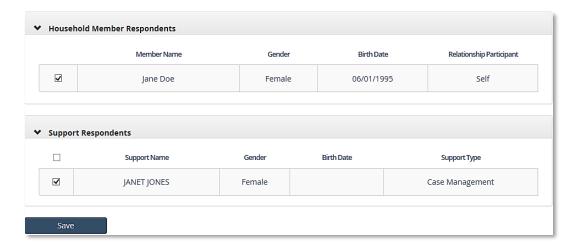   b. Click **Print** to generate the PDF.

ANSA Assessment - Overview

1. Click the **Overview** button in the **⌄ Assessment Actions** pane.

2. Completing the **⌄ Overview** pane:

   a. *ANSA Status*: The Status will default to "initial" but can be changed using the drop-down.

   b. *Does the individual have Medicaid*: Select "Yes" or "No" from the drop-down. If "Yes" is selected, enter the *Medicaid Number*.

   c. *Another form of Health Insurance*: Select "Yes" or "No" from the drop-down. If "Yes" is selected, enter the type of insurance in the *If Yes, Specify:* field.

d. *Comments*: Enter comments regarding the Assessment, if applicable.

e. Click [Save] in the [⌄ Overview] pane to save the information entered.

   i. The user should receive the "**Overview Details saved successfully.**" message before continuing on to the next item.
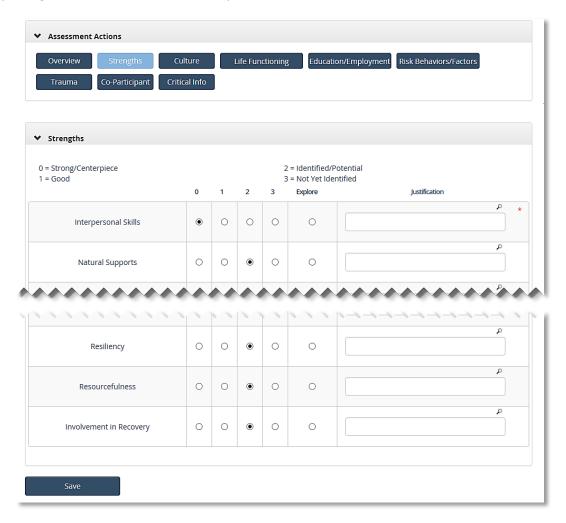
3. Selecting Respondents:

⌄ Household Member Respondents				
	Member Name	Gender	Birth Date	Relationship Participant
☑	Jane Doe	Female	06/01/1995	Self

⌄ Support Respondents				
☐	Support Name	Gender	Birth Date	Support Type
☑	JANET JONES	Female		Case Management

[Save]

a. [⌄ Household Member Respondents] pane: All of the potential Household Member Respondents are listed in this pane.
   i. Select the applicable individuals by checking the checkbox ☑ to the left of the desired individual's name in the grid.

b. [⌄ Support Respondents] pane: All of the potential Support Respondents are listed in this pane.
   i. Select the applicable individuals by checking the checkbox ☑ to the left of the desired individual's name in the grid.
   ii. To select all of the Support Respondents listed use the checkbox above the *Support Respondents* grid.

c. Click [Save] below the Respondents panes to save the selections.
   i. The user should receive the "**Respondents saved successfully.**" message before continuing on to the next item.

ANSA Assessment - Strengths

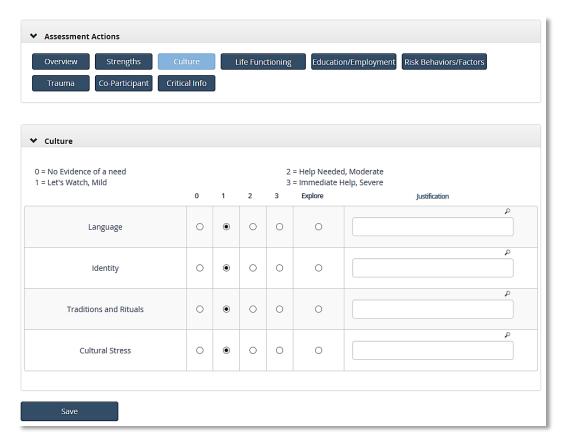1. Click the [Strengths] button in the [✔ Assessment Actions] pane.

2. Completing the [✔ Strengths] pane:

a. Rate each item using the scale at the top of the [✔ Strengths] pane.
b. Enter Justifications for ratings as needed.
c. Click [Save] below the [✔ Strengths] pane to save the ratings.
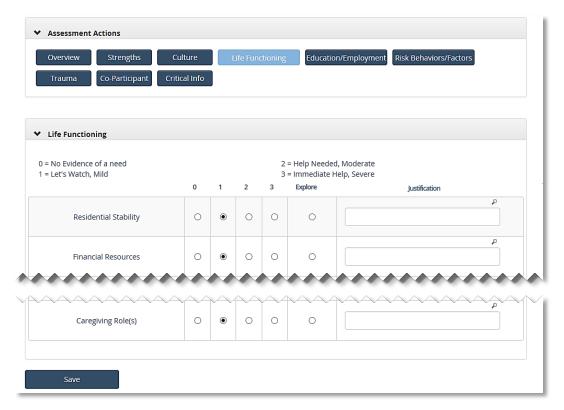
ANSA Assessment - Culture

1. Click the [Culture] button in the [❯ Assessment Actions] pane.

2. Completing the [❯ Culture] pane:

a. Rate each item using the scale at the top of the [❯ Culture] pane.
b. Enter Justifications for ratings as needed.
c. Click [Save] below the [❯ Culture] pane to save the ratings.

ANSA Assessment – Life Functioning

1. Click the [Life Functioning] button in the [⌄ Assessment Actions] pane.

2. Completing the [⌄ Life Functioning] pane:

a. Rate each item using the scale at the top of the [⌄ Life Functioning] pane.
b. Enter Justifications for ratings as needed.
c. If *Financial Resources* is rated at a 2 or higher the *Financial Resources* MultiSelect drop-down will open. Select all of the items that apply.

d. If *Intellectual/Developmental, Mental Health* or *Substance Use* items are rated at a 2 or higher specialized modules for each item will be enabled at the bottom of the screen. Rate all of the items within each of the modules that appear and enter Justifications for the ratings as needed.
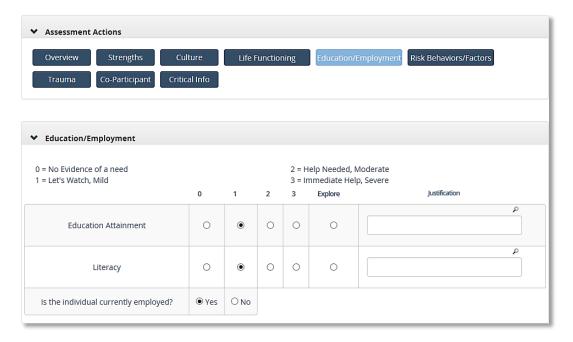
> **Intellectual/Developmental Needs** *

> **Mental Health Needs** *

> **Substance Use Disorder (SUD)** *

e. Click [**Save**] below the [✔ **Life Functioning**] pane to save the ratings.

ANSA Assessment – Education/Employment

1. Click the [**Education/Employment**] button in the [✔ **Assessment Actions**] pane.

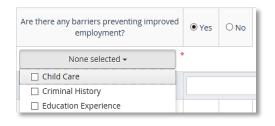2. Completing the [✔ **Education/Employment**] pane:

a. Rate each item using the scale at the top of the [✔ **Education/Employment**] pane.
b. Enter Justifications for ratings as needed.

c. If the individual is currently employed the [⌄ Employment Module *] will be enabled. If the individual is not currently employed the [⌄ Unemployment Module *] will be enabled instead. All items within the enabled module are mandatory.

   i. If there are barriers preventing employment or improved employment, the *Barriers* MultiSelect drop-down will be enabled. Select all items that apply.
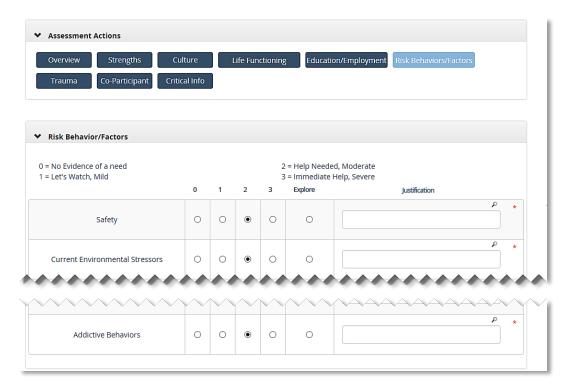
Are there any barriers preventing improved employment?	◉ Yes	○ No
None selected ▾	*	
☐ Child Care		
☐ Criminal History		
☐ Education Experience		

d. Click [Save] below the [⌄ Education/Employment] pane to save the ratings.

ANSA Assessment – Risk Behavior/Factors

1. Click the [Risk Behaviors/Factors] button in the [⌄ Assessment Actions] pane.

2. Completing the [⌄ Risk Behaviors/Factors] pane:

⌄ **Assessment Actions**

| Overview | Strengths | Culture | Life Functioning | Education/Employment | Risk Behaviors/Factors |
| Trauma | Co-Participant | Critical Info | | | |

⌄ **Risk Behavior/Factors**

0 = No Evidence of a need
1 = Let's Watch, Mild
2 = Help Needed, Moderate
3 = Immediate Help, Severe

	0	1	2	3	Explore	Justification
Safety	○	○	◉	○	○	[ ] *
Current Environmental Stressors	○	○	◉	○	○	[ ] *
Addictive Behaviors	○	○	◉	○	○	[ ] *

a. Rate each item using the scale at the top of the [⌄ Risk Behaviors/Factors] pane.
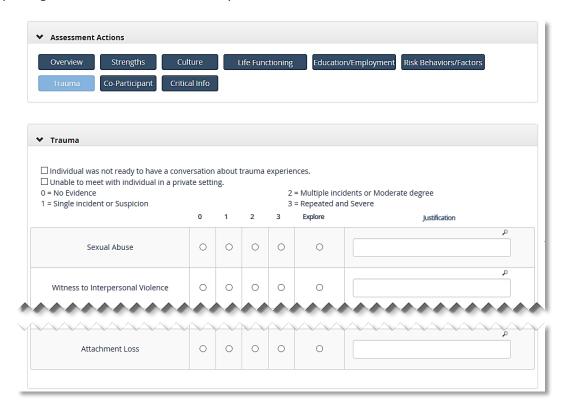
b. Enter Justifications for ratings as needed.
c. If the *Suicide Risk, Danger to Others,* or *Justice Involved Behavior* items are rated at a 2 or higher specialized modules for each item will be enabled at the bottom of the screen. Rate all of the items within each of the modules that appear and enter Justifications for the ratings as needed.

> **Suicide Risk** *

> **Violence** *

> **Justice Involved** *

d. Click [Save] below the [❤ Risk Behaviors/Factors] pane to save the ratings.

ANSA Assessment - Trauma

1. Click the [**Trauma**] button in the [❤ Assessment Actions] pane.

2. Completing the [❤ Trauma] pane:

❤ **Assessment Actions**

| Overview | Strengths | Culture | Life Functioning | Education/Employment | Risk Behaviors/Factors |
| Trauma | Co-Participant | Critical Info |

❤ **Trauma**

☐ Individual was not ready to have a conversation about trauma experiences.
☐ Unable to meet with individual in a private setting.
0 = No Evidence   2 = Multiple incidents or Moderate degree
1 = Single incident or Suspicion   3 = Repeated and Severe

	0	1	2	3	Explore	Justification
Sexual Abuse	○	○	○	○	○	
Witness to Interpersonal Violence	○	○	○	○	○	
Attachment Loss	○	○	○	○	○	

a. If either of the ☑ *Individual was not ready to have a conversation about trauma experiences* or ☑ *Unable to meet with individual in a private setting* checkboxes are checked the entire ❯ Trauma section is disabled.
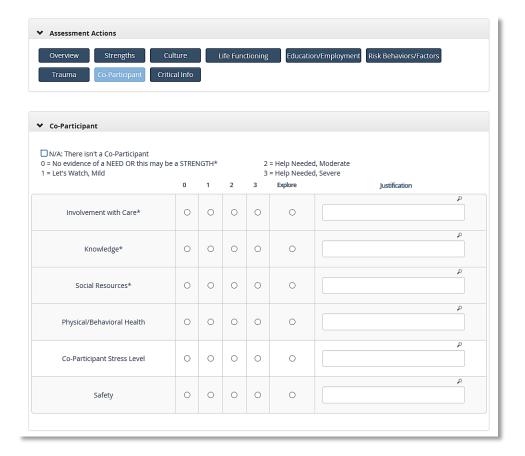
b. If the ❯ Trauma pane is not disabled:

   i. Rate each item using the scale at the top of the ❯ Trauma pane.

   ii. Enter Justifications for ratings as needed.

c. Click **Save** below the ❯ Trauma pane to save the ratings.

   Note: even if this section has been disabled the **Save** button must still be clicked before moving on to another section.

ANSA Assessment − Co-Participant

1. Click the **Co-Participant** button in the ❯ Assessment Actions pane.

2. Completing the ❯ Co-Participant pane:

a. If the ☑ *N/A: There isn't a Co-Participant* checkbox is checked the entire
    ⌄ Co-Participant section is disabled.

b. If the ⌄ Co-Participant pane is not disabled:

    i.   Rate each item using the scale at the top of the ⌄ Co-Participant pane.
    ii. Enter Justifications for ratings as needed.

        Note that if any of the items with an asterisk after the item title are rated as zero (0)
        the Assessor will be asked *Is this item a strength?* If "Yes" is selected, a justification
        for this rating is required.

c. Click **Save** below the ⌄ Co-Participant pane to save the ratings.

    Note: even if this section has been disabled the **Save** button must still be clicked
    before moving on to another section.

ANSA Assessment – Critical Info

1. Click the **Critical Info** button in the **⌄ Assessment Actions** pane.

2. Completing the **⌄ Critical Info** pane:

> ❯ Assessment

⌄ **Assessment Actions**

| Overview | Strengths | Culture | Life Functioning | Education/Employment | Risk Behaviors/Factors |

| Trauma | Co-Participant | Critical Info |

⌄ **My Life My Story** *

The following is an opportunity for the consumer to share their life story including: what makes them unique, what are their preferences, traditions, values. This should not be documentation based on assessor's feelings or interpretations. Once the ANSA is completed, there is a final section for additional documentation and the ANSA assessor's knowledge and observations.

⌄ **Natural Supports** *

Who is important to you in your life right now? Who do you go to when you need support? Who will you count on for support after you leave DHS services?

⌄ **Documented Information**

☐ Treatment Plans   ☐ Police Reports
☐ Discharge Summaries   ☐ Hospital Records
☐ WRAP Plans   ☐ Mental Health Advance Directives
☐ Other   ☐ Other

☐ Other   ☐ Other

Comments

Does the individual need the following items that may be needed when planning services/supports?
☐ Photo ID   ☐ Birth Certificate
☐ Driver's Licence   ☐ Wellness Action Recovery Plan
☐ Social Security Card   ☐ Mental Health Advance Directive

⌄ **Assessor's Observations/Knowledge/Notes** *

Please include any notes, comments or observations that the assessor wants to include as part of the consumer's ANSA.

3. ❯ My Life My Story , ❯ Natural Supports , and ❯ Assessor's Observations/Knowledge/Notes are all mandatory sections. Enter information in the narrative for each of these sections.

4. ❯ Documented Information : note any and all relevant documented information in this section. If there is no relevant documented information to enter this section can be left blank.

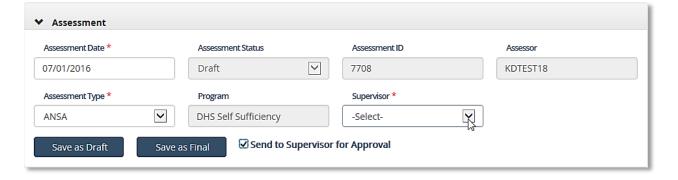5. Click [Save] below the ❯ Critical Info pane to save the entered information.

Saving as Final and Requesting Approval

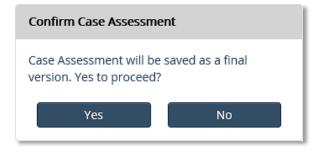1. When the Assessment has been completed maximize the ❯ Assessment pane and click [Save as Draft].

2. If the Assessment is ready to be finalized, click [Save as Final] in the ❯ Assessment pane at the top of the screen. If Supervisory Approval is required, the ☑ *Send to Supervisor for Approval* checkbox must be checked and a Supervisor must be selected prior to clicking [Save as Final].

❯ Assessment

Assessment Date *	Assessment Status	Assessment ID	Assessor
07/01/2016	Draft	7708	KDTEST18

Assessment Type *	Program	Supervisor *
ANSA	DHS Self Sufficiency	-Select-

[Save as Draft] [Save as Final] ☑ Send to Supervisor for Approval

a. Upon clicking Save as final a confirmation pop-up will appear:

Confirm Case Assessment

Case Assessment will be saved as a final version. Yes to proceed?

[Yes]   [No]

Clicking [Yes] will save the Assessment as Final.

Clicking [No] will close the confirmation pop-up without saving the Assessment as Final.