User Guide: ANSA

Version 1.0 (California)

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User Guide: ANSA

General Information

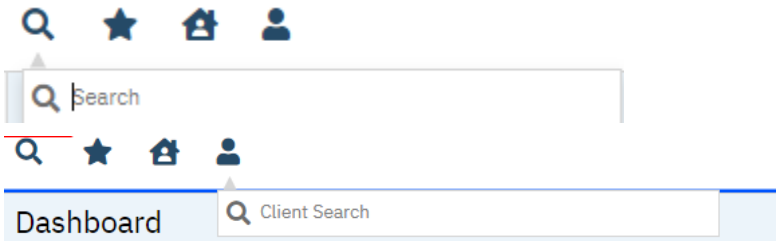
The ANSA document is utilized in SmartCare to complete the information gathering for clients age 18 or older, depending on your county requirements, to be used in submission to the state through the state reporting process. The ANSA document should be updated regularly based on state requirements. It should also be completed at time of discharge.

Navigating to and Creating the ANSA Document

From the Client Search or Quick link

You can create the document from the client tab. In order to do this, you must first search for the client or select the client from your primary list in client search drop down.

Navigate to the 'Person Icon'. Click the dropdown and select 'Client Search' or choose the client name in the drop down. If using search functionality, see below:



You will be presented with the 'Client Search' screen. On this screen, you will be able to search for a client by a number of parameters.

- Broad Search - Allows for the search of a client by name, partial name, sounds like.
- Narrow Search - Returns for search of exact name match
- SSN Search - Social Security Number search
- DOB Search - Date of Birth search
- Primary Clinician Search - Search by assigned primary clinician
- Authorization ID/# - Search by authorization ID or number recorded in SmartCare
- Phone # Search - Client phone number search
- Master Client ID Search - Used in Care Management; Search by client's Master Record ID. Your organization will not use this button.
- Client ID Search
- Insured ID Search-search by insurance ID.

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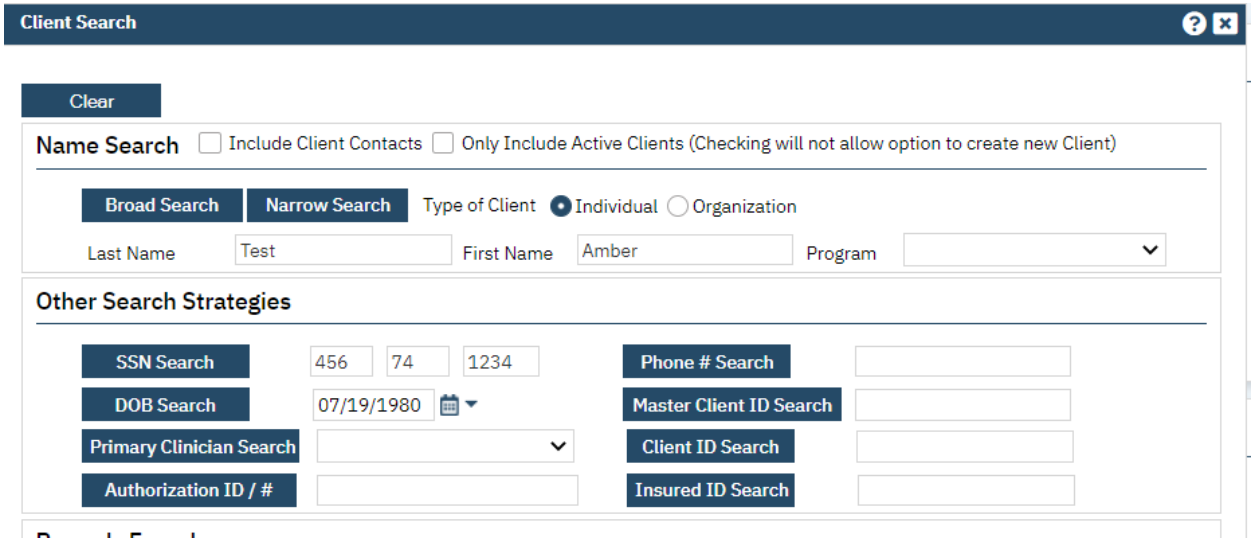
Upon opening client search you will note that the only button to the bottom right that is actionable is 'Cancel.' Your client should already exist at this point of your workflow, so you can enter information in each of the fields you would like to use for a search parameter and click the corresponding search button for each, as shown outlined in below.



If the client for whom you are searching already has a record in SmartCare, you will have the ability to select the existing record.

- Select - This will open the selected client's record

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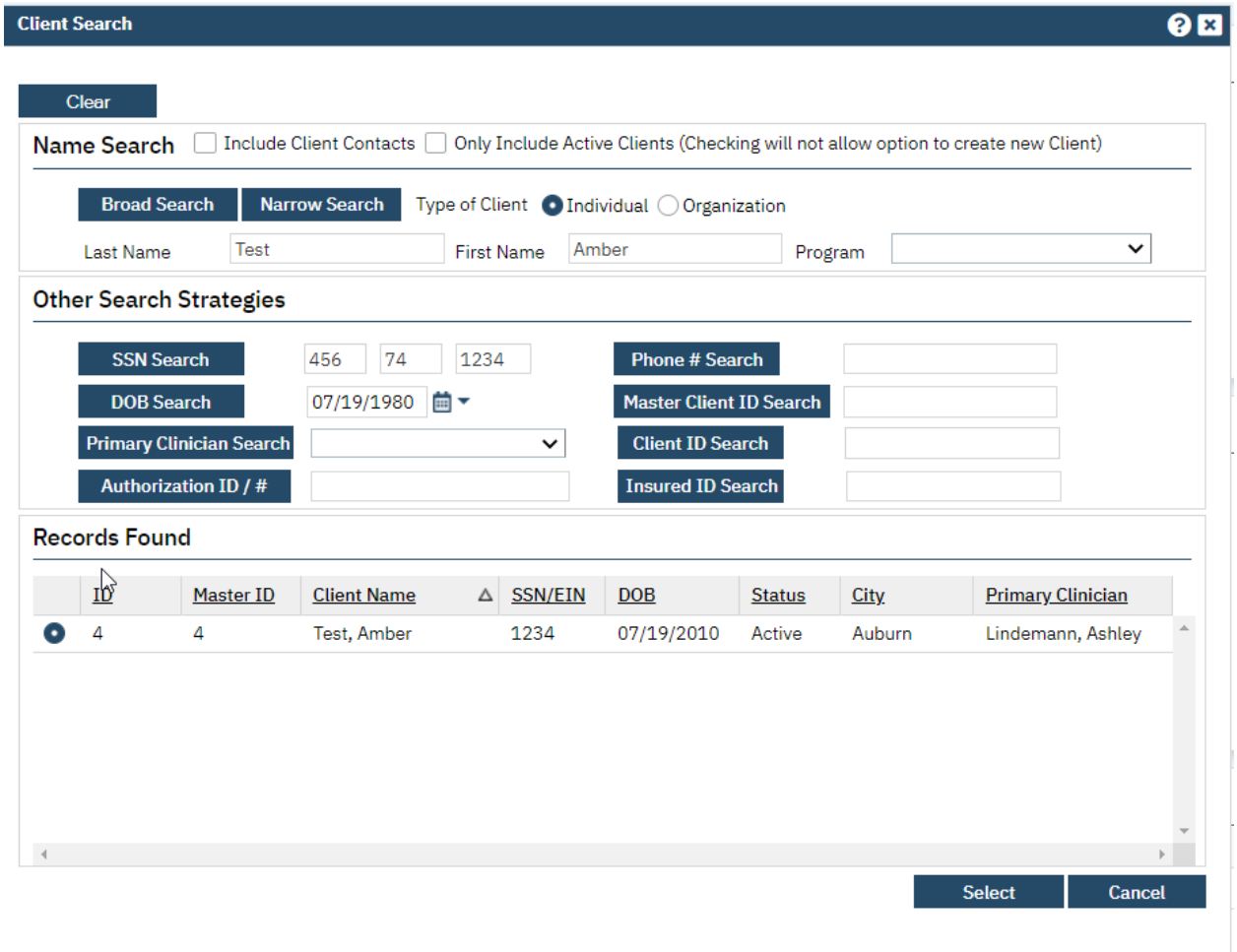
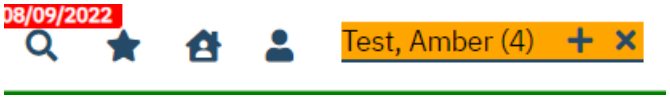


Click the 'Select' button to open the existing client. Once the client has been opened, you will note that there is a new tab open with the client's name and ID displayed.



This is the client tab. When a client is selected, the client's name will appear on the toolbar. This is where you will be able to create the ANSA document.

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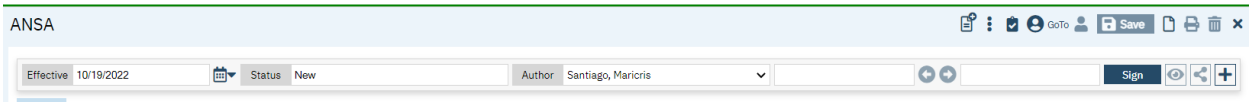
By using the magnifying glass to search for the ANSA document you can search for the assessment or locate the assessment using a quick link.

ANSA Document

General

Under the ANSA Document label, note the information pertaining to the status of the document.



We will explore these fields more thoroughly when completing the ANSA document. However, note at this time that an effective date will be required to complete the document and it is defaulting to today's date. This default is configurable and can be changed, depending on your organization.

Beneath the authorship, status, and effective date fields, information in the ANSA document is broken out into four possible tabs:

- Initial
- General Domains (ANSA-T)
- General Domains (ANSA)
- Caregiver Needs

In completing your client's ANSA document, you will navigate across the tabs, left to right, beginning with Initial, but you can jump around as often as you like, as long as all required fields are completed prior to signing.

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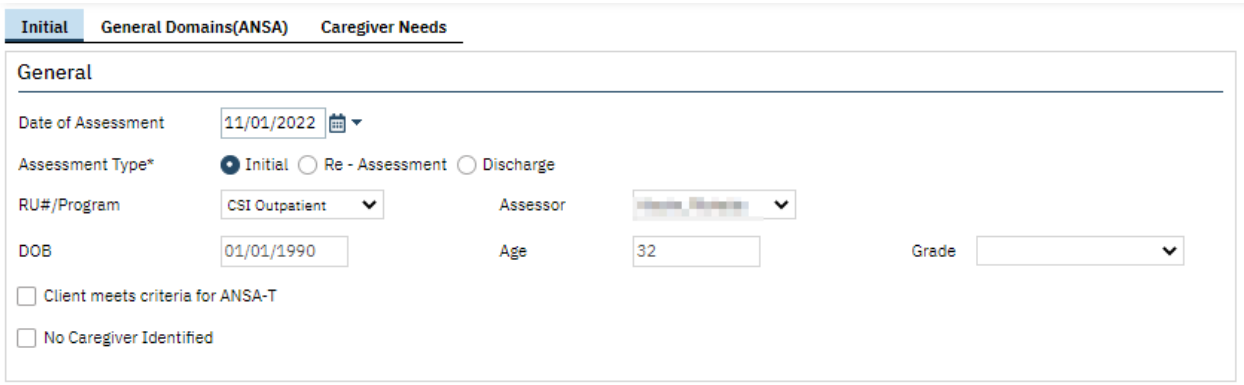
Each tab on the ANSA, as you will note throughout SmartCare, is broken out into sections. We will look at each section per tab in turn, paying specific attention to which fields have been required by your organization.

Initial Tab

General

In the General section, all of the fields are required to contain information:



- Date of Assessment – Calendar control field to indicate the date the assessment was completed. The Date of Assessment will initialize with the effective date, or the date that the ANSA is opened. This initialization logic can be changed if desired.

- Client DOB – This field is not editable and will initialize with the current date of birth in client information, as well as the client's age. Client's age is determined by the effective date of the assessment, meaning that if a clinician starts an assessment and completes it a day later, the assessment will still pull tabs that are reflective to how old the client was on the date that the assessment was started.

- County- This will default if the value exists in Configuration Key, if the value exists field will be hidden. If this field shows, additional tabs will not be seen until a selection is made and user clicks 'SAVE'. See Set Up considerations for more information on the Configuration Key set up.

- Assessment Type- Radio buttons of Initial, Reassessment, and Discharge. This field will default to 'Initial' if there has not been a California ANSA completed for the client and the same County is selected during the current client SmartCare episode. This is a required field.

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- Assessor- Dropdown to choose staff name. This field initializes the name of the staff who is the author of this document. You can select a different name if the author is not the assessor.
- RU#/Program- Dropdown to choose program name for which this document is being completed.
- Grade- Dropdown to choose grade.
- Checkbox – “Client meets criteria for ANSA-T”.
- Checkbox- “No caregiver Identified”.

Due to county requirements varying across counties, we have given your organization the ability to capture county specific fields through our DFA functionality within each section. See Set Up section for information about how each DFA you see here is tied to this document to determine where it should appear.

Global Codes

Field Name	Global Code Category Name
Grade	EDUCATIONLEVEL

General Domains (ANSA-T)

This tab will only show for ages 25 and under.

Life Domains (Under 25)

Select the appropriate score for each item below and one selection for each item is required. Radio button options of 0, 1, 2, and 3 are available. User will also see a “Previous Rating” column, indicating what the previous selection was in most recent signed ANSA document for the particular client.

After each Domain, there is a summary text field for the user to add comments or add further rationale in regards to the items chosen above. This text will initialize to the next ANSA that is completed for the client , in the SmartCare episode, not the California reporting episode.

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Life Domains (Under 25)

0= No Evidence of problems, no reason to leave item requires action

1= Watchful waiting monitoring or possibly prevention action

2= Need for action. Some strategy needed to address problem/need

3= Need for immediate action. Safety Concern; priority for intervention.

Items	N/A	0	1	2	3	Previous Rating
Family Functioning		○	○	○	○	
Medical/Physical		○	○	○	○	
Residential Stability		○	○	○	○	
School	○	○	○	○	○	
Social Functioning		○	○	○	○	
Recreational		○	○	○	○	
Parental/Caregiving Role		○	○	○	○	
Developmental/Intellectual		○	○	○	○	
Basic Activities of Daily Living/Self-Care		○	○	○	○	
Decision Making/Judgement		○	○	○	○	
Employment Functioning	○	○	○	○	○	
Medication Adherence		○	○	○	○	
Legal		○	○	○	○	
Sexuality/Sexual Development		○	○	○	○	
Sleep		○	○	○	○	
Independent Living Skills		○	○	○	○	
Transportation		○	○	○	○	
Living Situation		○	○	○	○	
Involvement in Recovery		○	○	○	○	

There will be a space after this section where a County Specific DFA can initialize.

If county specific documents appear, or not, below will not be the text field as seen here.

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Life Functioning Domain/Modules

Please write a rationale for any items in the above domain or module rated actionable (2 or 3)

Individual Strengths

Individual Strengths

0= No Evidence of problems, no reason to leave item requires action

1= Watchful waiting monitoring or possibly prevention action

2= Need for action. Some strategy needed to address problem/need

3= Need for immediate action. Safety Concern; priority for intervention.

Items	N/A	0	1	2	3	Previous Rating
Family Strengths/Support		○	○	○	○	
Interpersonal/ Social Connectedness		○	○	○	○	
Optimism (Hopefulness)		○	○	○	○	
Talents and Interests		○	○	○	○	
Educational/Vocational	○	○	○	○	○	
Volunteering		○	○	○	○	
Job History		○	○	○	○	
Spiritual/ Religious		○	○	○	○	
Community Connection		○	○	○	○	
Natural Supports		○	○	○	○	
Resilience		○	○	○	○	
Resourcefulness		○	○	○	○	
Cultural Factors		○	○	○	○	
Cultural Identity		○	○	○	○	

There will be a space after this section where a County Specific DFA can initialize.

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Individual Strengths

Please write a rationale for any item in the above domain or modules rated actionable (2 or 3)

Behavioral/Emotional Needs

Behavioral/Emotional Needs

0= No Evidence of problems, no reason to leave item requires action

1= Watchful waiting monitoring or possibly prevention action

2= Need for action. Some strategy needed to address problem/need

3= Need for immediate action. Safety Concern; priority for intervention.

Items	0	1	2	3	Previous Rating
Psychosis (Thought Disorder)	○	○	○	○	
Impulse Control	○	○	○	○	
Depression	○	○	○	○	
Mood Disturbance	○	○	○	○	
Anxiety	○	○	○	○	
Interpersonal Problems	○	○	○	○	
Antisocial Behaviors	○	○	○	○	
Anger Control	○	○	○	○	
Substance Use	○	○	○	○	
Eating Disturbance	○	○	○	○	
Adjustment to Trauma	○	○	○	○	

There will be a space after this section where a County Specific DFA can initialize.

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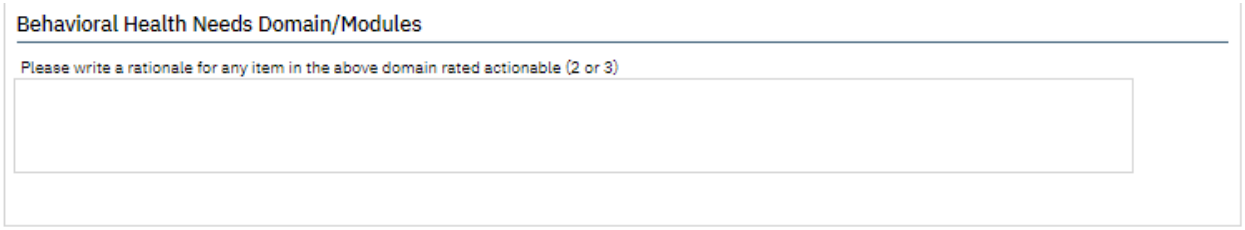
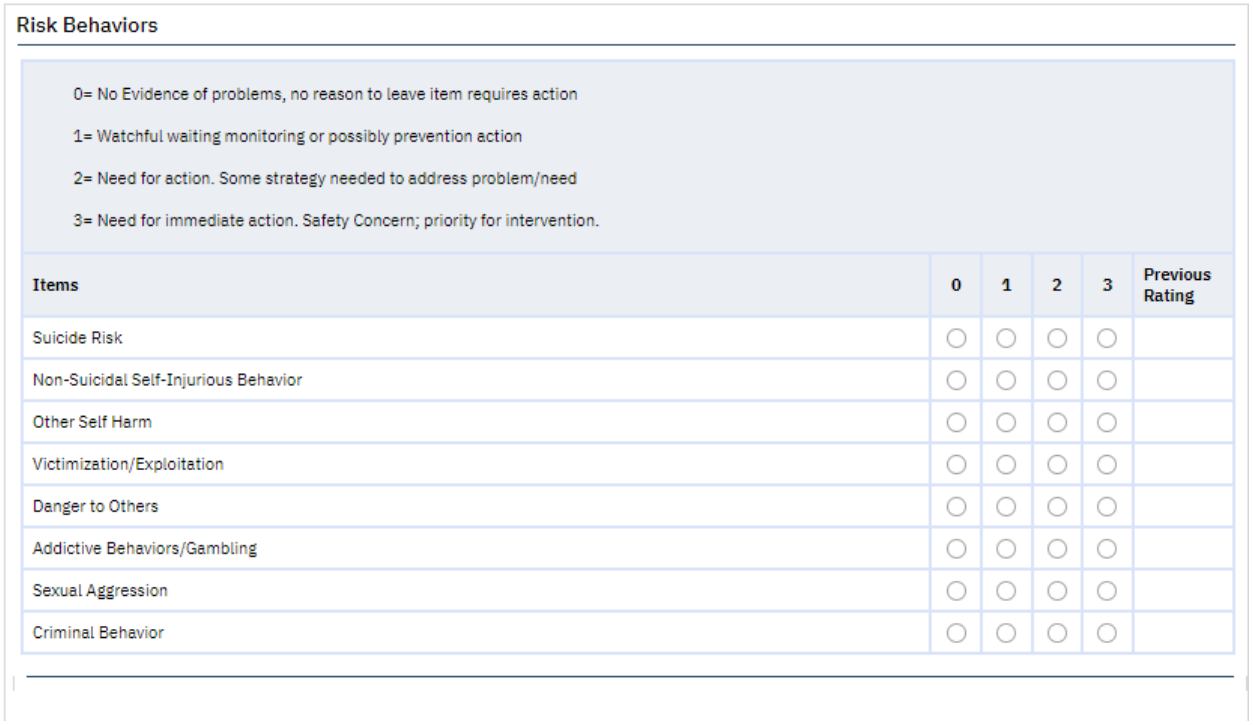


Risk Behaviors



There will be a space after this section where a County Specific DFA can initialize.

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Risk Behaviors Domains/Modules

Please write a rationale for any item in the above domain or modules rated actionable (2 or 3)

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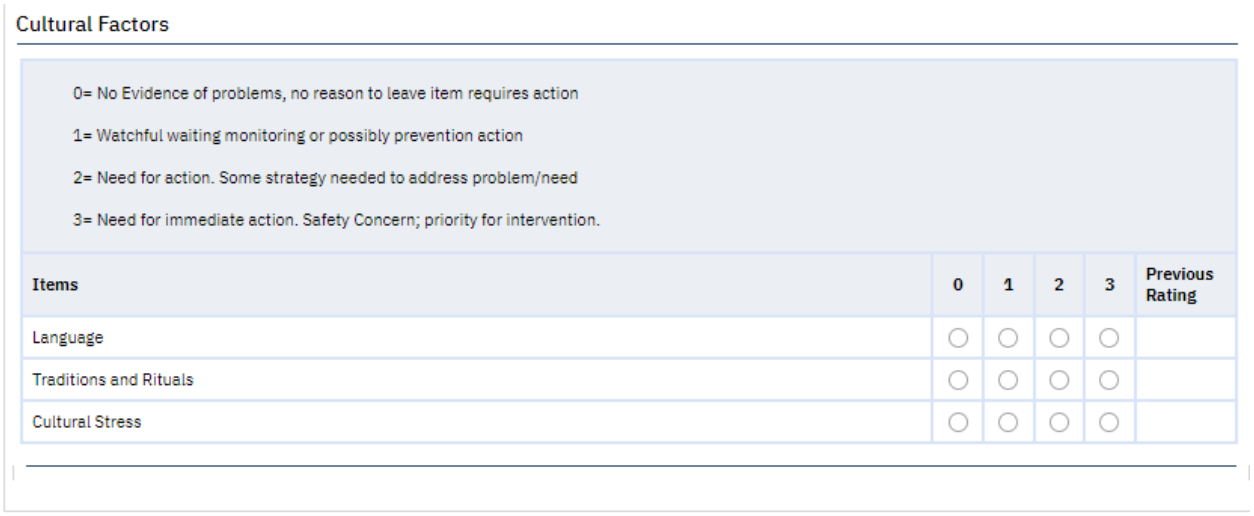
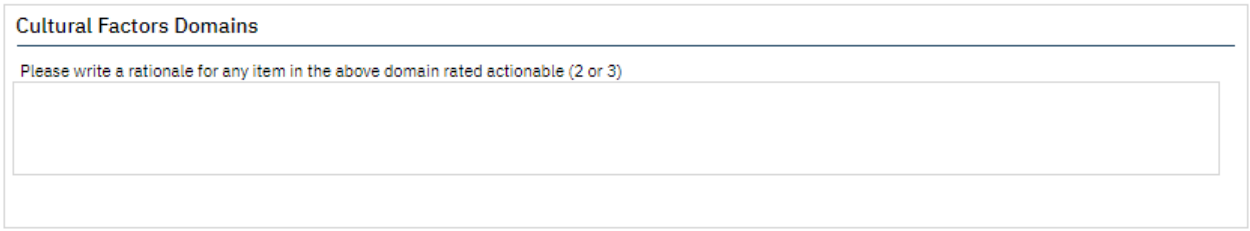
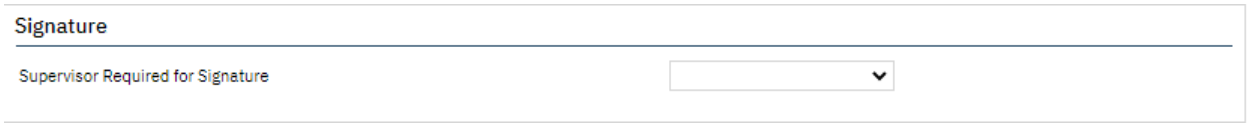
Cultural Factors



There will be a space after this section where a County Specific DFA can initialize.



Signature



This is not a required field, but if it is filled in with appropriate supervisor's name, then that supervisor will be added to the list of co-signers needed for signing this document and will be notified to co-sign once author signs the ANSA.

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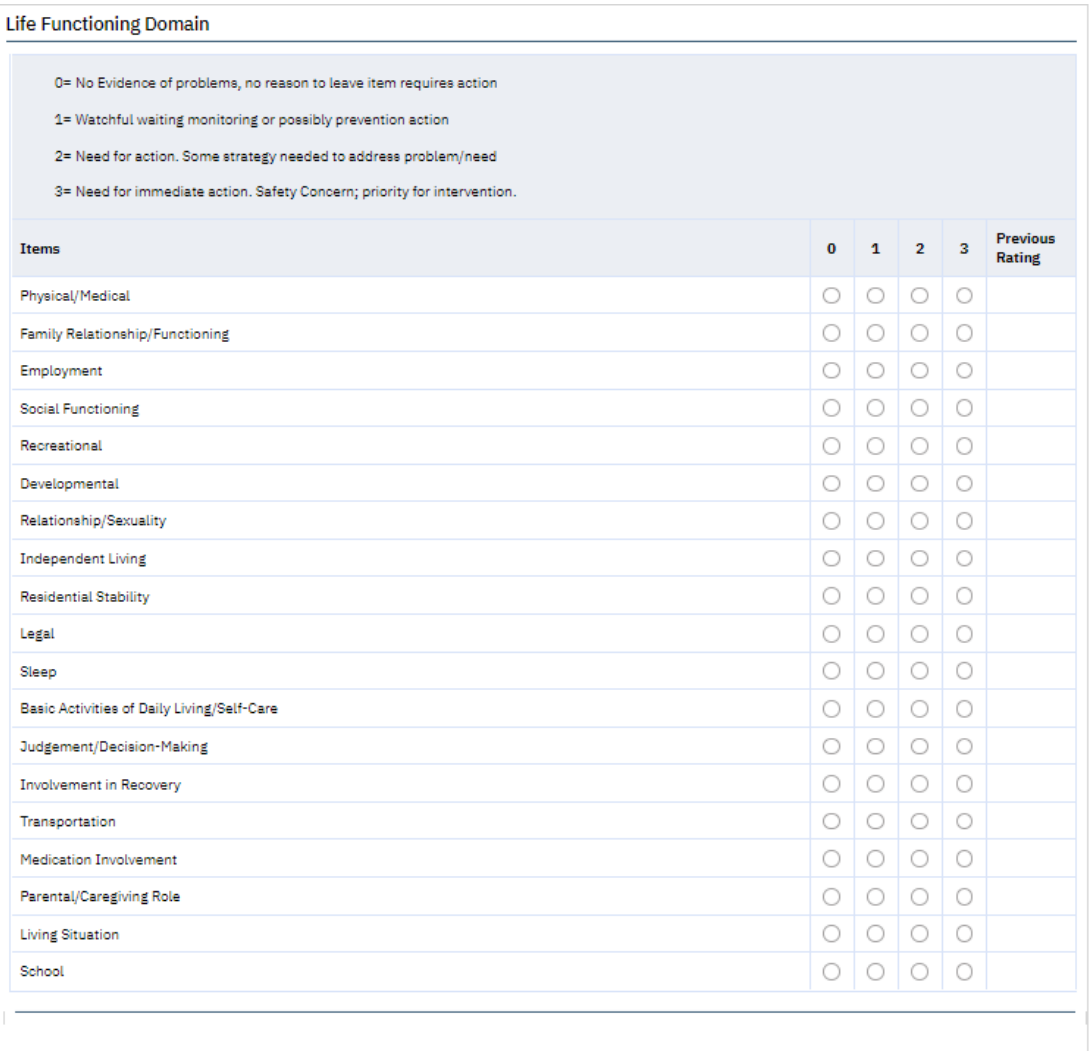
General Domains (ANSA)

Life Functioning Domain

Select the appropriate score for each item below and one selection for each item is required. Radio button options of 0, 1, 2, and 3 are available. User will also see a “Previous Rating” column, indicating what the previous selection was for the particular client.



Life Functioning Domain

0= No Evidence of problems, no reason to leave item requires action

1= Watchful waiting monitoring or possibly prevention action

2= Need for action. Some strategy needed to address problem/need

3= Need for immediate action. Safety Concern; priority for intervention.

Items	0	1	2	3	Previous Rating
Physical/Medical	○	○	○	○	
Family Relationship/Functioning	○	○	○	○	
Employment	○	○	○	○	
Social Functioning	○	○	○	○	
Recreational	○	○	○	○	
Developmental	○	○	○	○	
Relationship/Sexuality	○	○	○	○	
Independent Living	○	○	○	○	
Residential Stability	○	○	○	○	
Legal	○	○	○	○	
Sleep	○	○	○	○	
Basic Activities of Daily Living/Self-Care	○	○	○	○	
Judgement/Decision-Making	○	○	○	○	
Involvement in Recovery	○	○	○	○	
Transportation	○	○	○	○	
Medication Involvement	○	○	○	○	
Parental/Caregiving Role	○	○	○	○	
Living Situation	○	○	○	○	
School	○	○	○	○	

There will be a space after this section where a County Specific DFA can initialize.

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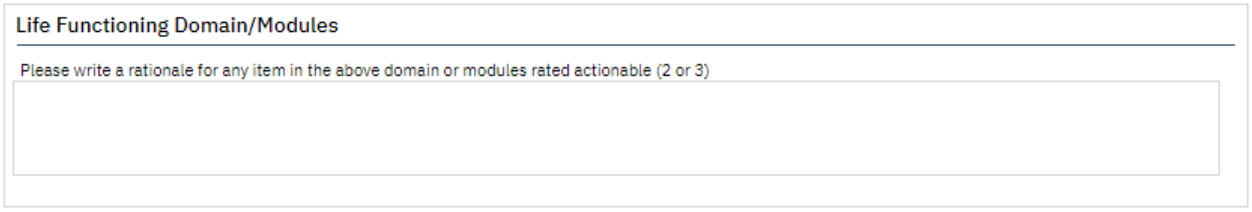
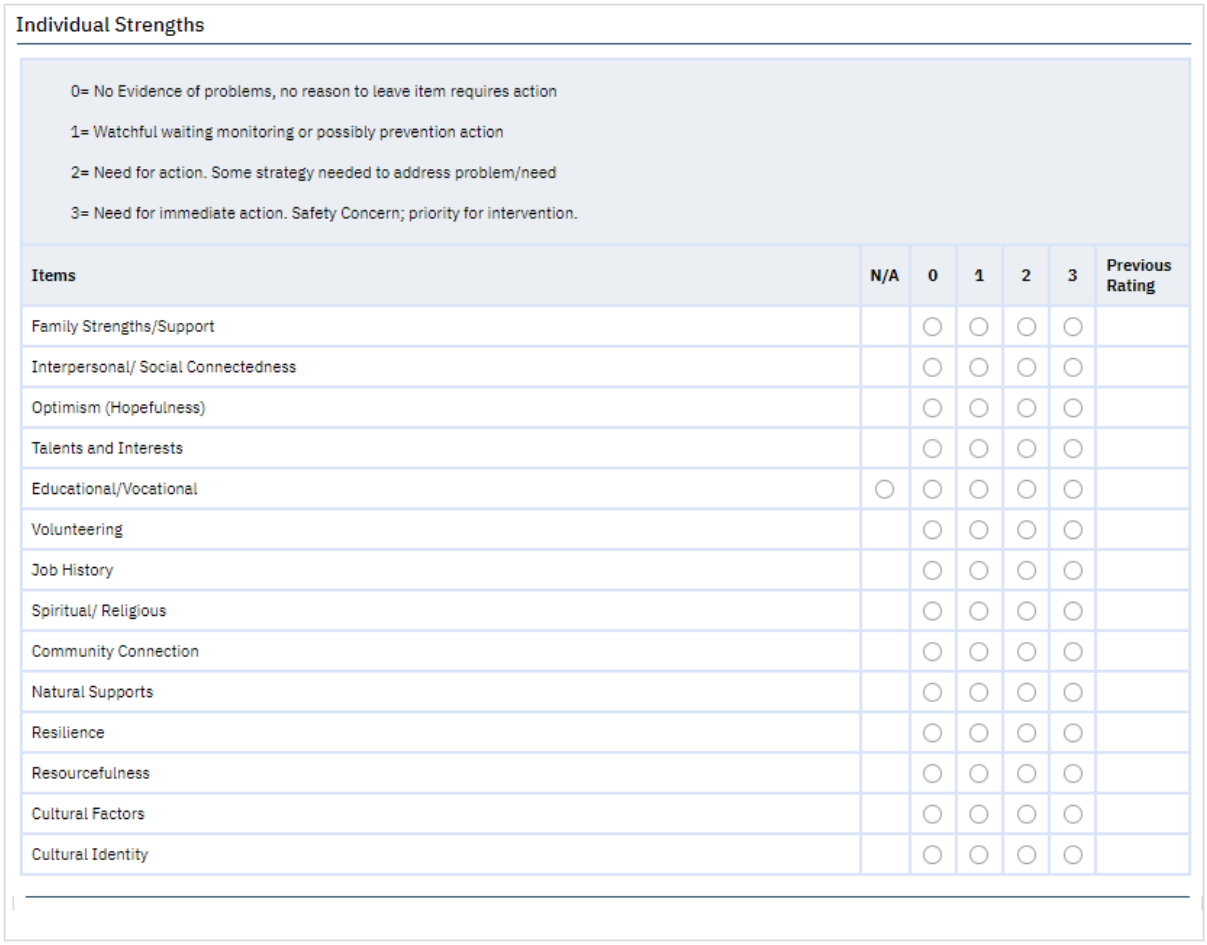
After each Domain, there is a summary text field for the user to add comments or add further rationale in regards to the items chosen above. This text will initialize to the next ANSA that is completed for the client, in the SmartCare episode, not the California reporting episode.



Individual Strengths



There will be a space after this section where a County Specific DFA can initialize.

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Individual Strengths

Please write a rationale for any item in the above domain or modules rated actionable (2 or 3)

Behavioral/Emotional Needs

Behavioral/Emotional Needs

0= No Evidence of problems, no reason to leave item requires action

1= Watchful waiting monitoring or possibly prevention action

2= Need for action. Some strategy needed to address problem/need

3= Need for immediate action. Safety Concern; priority for intervention.

Items	0	1	2	3	Previous Rating
Psychosis (Thought Disorder)	○	○	○	○	
Impulse Control	○	○	○	○	
Depression	○	○	○	○	
Mood Disturbance	○	○	○	○	
Anxiety	○	○	○	○	
Interpersonal Problems	○	○	○	○	
Antisocial Behaviors	○	○	○	○	
Anger Control	○	○	○	○	
Substance Use	○	○	○	○	
Eating Disturbance	○	○	○	○	
Adjustment to Trauma	○	○	○	○	

There will be a space after this section where a County Specific DFA can initialize.

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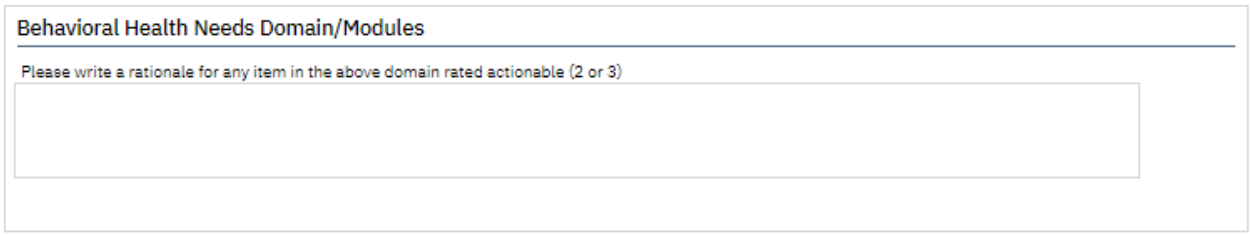
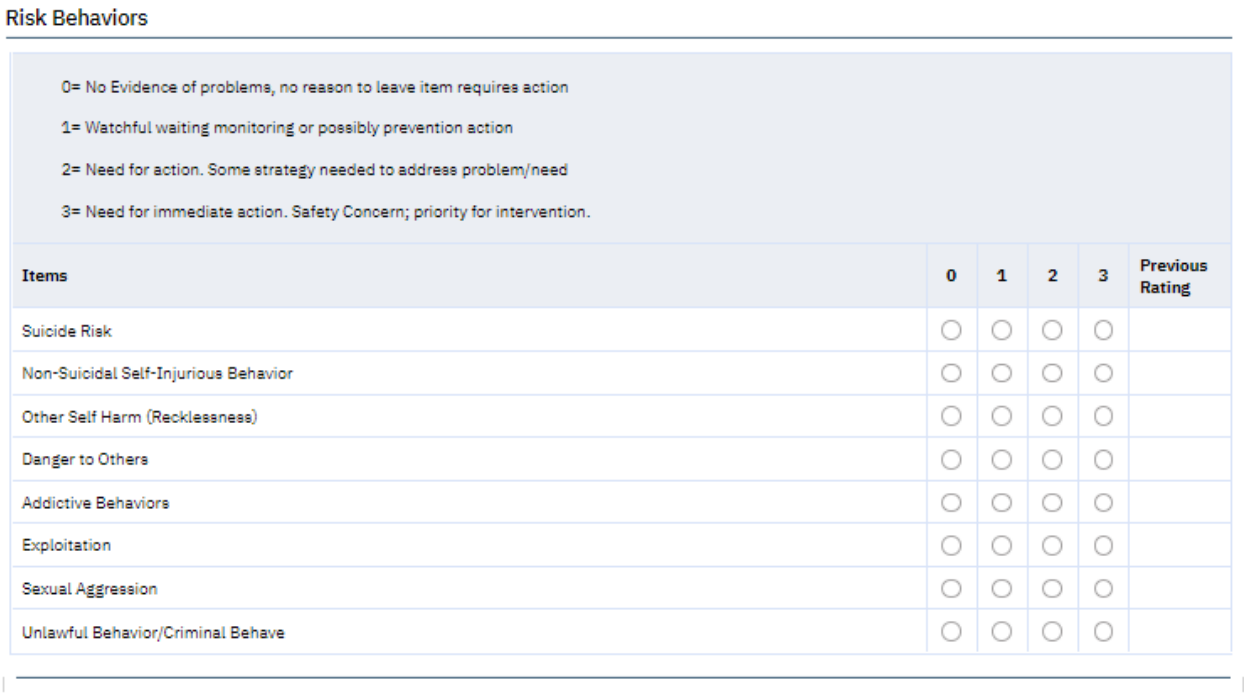
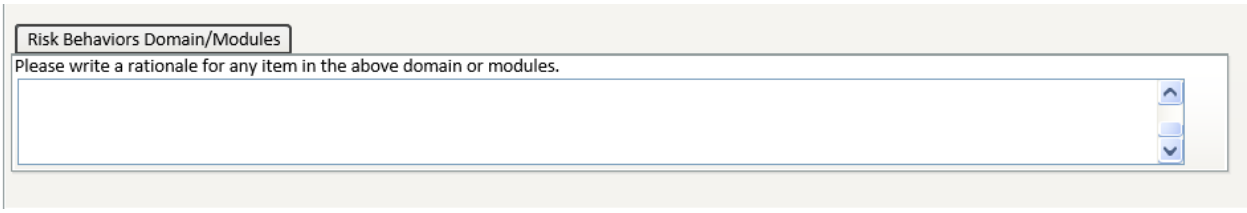


Risk Behaviors



There will be a space after this section where a County Specific DFA can initialize.



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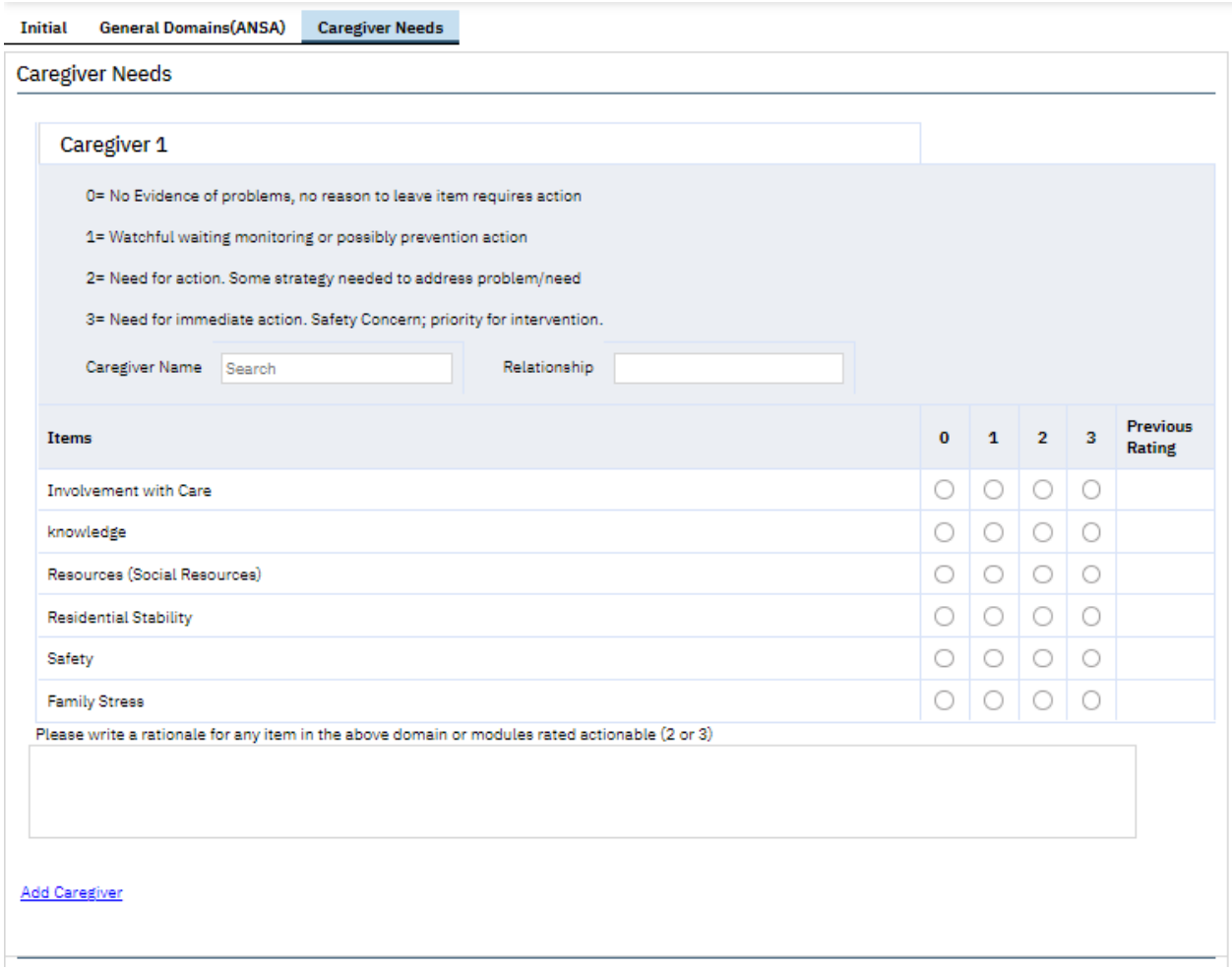
Caregiver Resources Tab

This tab will not appear when a user selects "No Caregiver Identified" on the Initial tab, otherwise this tab will appear.



Select the appropriate score for each item above and one selection for each item is required. Radio button options of 0, 1, 2, and 3 are available. User will also see a "Previous Rating" column, indicating what the previous selection was for the particular client.

After this Domain, there is a summary text field for the user to add comments or add further rationale in regards to the items with the selection from above. This text will initialize to the next ANSA that is completed for the client, in the SmartCare episode, not the California reporting episode.

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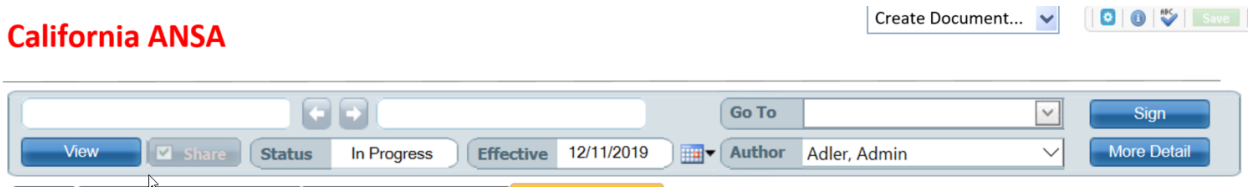
The 'Add Caregiver' hyperlink at the bottom of the document is where a user is able to add an additional caregiver if applicable.

There will be a space after this section where a County Specific DFA can initialize.

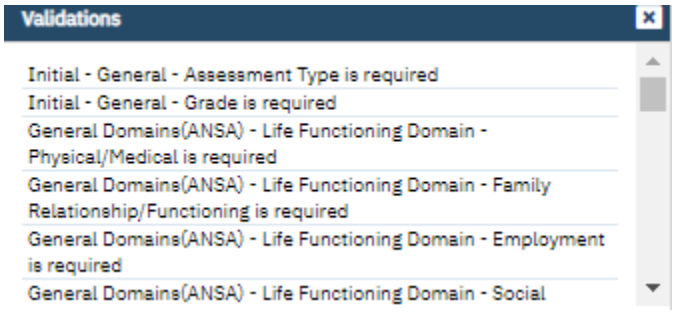
Completing the ANSA Document

Now, you have two options: sign or save. If there is a compelling reason not to complete and sign the document, it can be saved and returned to at a later time by clicking the save button in the toolbar.

However, keep in mind that if the ANSA document is not signed information will not initialize into the client record, where applicable. To sign the document, it is not required that you save it first. Signing will both save and sign the document. First, ensure that the document has an effective date, and then click the blue 'Sign' button.



When you click the sign button, if you have fields that are required that you did not enter data into, you will receive a validation message like the one below.



The validation message will tell you exactly where you need to go to complete the requirement. The first part of the message (e.g. initial) will tell you on what tab you will find the requirement on. The second part of the message (e.g. General) will tell you which section to find the requirement in. The third part of the message (e.g. Assessment Type is required) will tell you what the requirement itself is.

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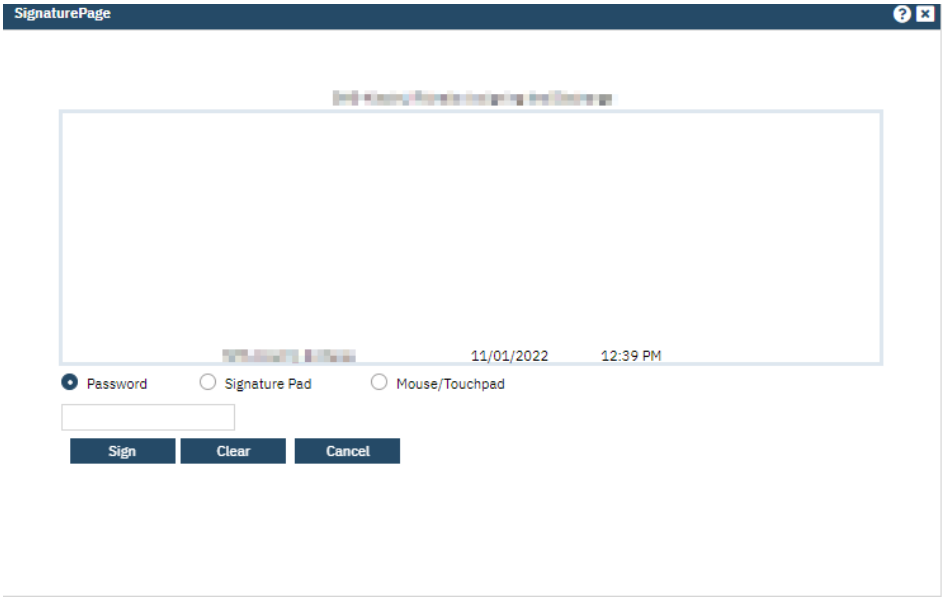
Once all requirements have been completed, click the sign button again (if validations occurred). You will then be presented with the signature screen. By typing in your password and clicking 'Sign' the document will be signed and applicable information initialized to the client record.



Once the document is signed, you should see a PDF of the document on the screen and status should change to complete.

Set-Up Considerations (Administrative Purpose)

This section outlines all items needed for setting up this document for use with your organization, including any necessary configurations/details around how to set up other areas of your system that work directly with this document.

Dynamic Form Architecture (DFA)

The CA ANSA was developed to allow configurable DFA tabs and sections to allow for the collections of customer specific business needs or county specific data collection requirements. These DFA tabs sections are driven based on the selection of the County of Submission field in the Initial tab. Once the county is selected and the user clicks Save, the DFA sections and/or tabs will load. At this time, the loading and mapping of these DFA's requires Streamline development.

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DFA Section Location

The CA ANSA DFA sections are located within each Domain. When loaded these will display between the sections the include the Domain Items and the comment box to provide additional rationale for any of the items in the above domain or module.

Architecture

Table Name: DocumentCAStateReportingCountyDFAMappings

This table is used to show the County specific DFA tab in the respective Documents

In the table, every row should have unique records (The combination of Managing Entity +Document

Code + DFA Form Id+ Section Name).

The table is pre-loaded by the SA/Developer based on the BA's or customer instruction on which DFA

Section we need to show for which county in the Documents

Example:

ManagingEntitiy	DocumentName	Form ID	FormName
Alameda	CA ANSA	1001	Life Domains (Under 25)
Alameda	CA ANSA	1002	Behavioral/ Emotional
Alpine	CA ANSA	1003	Risk Behaviors

Configuration Keys

Field Name	Configuration Key Category Name
County of Submission	XSetCountyCodeForCaliforniaStateReporting

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If your organization only provides services to clients within ONE county, then you should enter the County Code as defined by your state here. If nothing is entered, then on the form, user will be required to select the County every time. If something is entered here, then user will not see the field and it will prepopulate in the table for this document to be sent for reporting to the accurate county.

If your organization provides services to clients in more than one county and you report to each of those counties, then you should indicate 'None' in this key or leave it blank and users will be required to select the county each time they do the document.

If there are counties you do not provide services to, you can go to the DACSManagingEntity Global Code category in the Global Codes screen and deactivate any counties you do not want staff to see in the drop down. You should only do this for counties that NONE of your programs are serving. You should keep all counties that at least one program serves as active.

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