



## MEMORANDUM

TO: Adult and Older Adult County Outpatient Clinics and County Contracted Providers (CCPs)

FROM: Sherri Terao, Director, Behavioral Health Services Department <sup>DS</sup> ST  
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RE: Adult and Older Adult Outcomes Tool for Mental Health Programs

DATE: August 8, 2024

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### Overview

The County of Santa Clara Behavioral Health Services Department (BHSD) formed an AOA Functional Assessment Tools Workgroup to research and recommend a standardized and validated outcomes tool that would assist with tracking change and success at the client, program, agency, and county/systemwide level. This tool would replace the Milestones to Recovery (MORS) tool. The Workgroup consisted of 19 members of various expertise across the AOA system of care. There were 7 members from CCPs, 2 members from county clinics, 1 peer support member, 3 contract monitors, 1 member from BHSD Utilization Management, 1 member from BHSD Analytics and Research, and 4 from BHSD Quality Improvement.

The Workgroup ran from April 2022 – October 2022, meeting every other week, to determine and prioritize beneficiary, programmatic, and AOA System of Care needs. Seven (7) tools commonly used across the State of California as well as in some County CCP programs, were reviewed, requesting presentations from five tools that met the workgroup's list of departmental needs. Presentations were provided by representatives for each of the tools, and workgroup members evaluated each. The top two recommended tools were the Adult Needs & Strengths Assessment (ANSA) and Reaching Recovery.

### Determination

Based upon the recommendations from the workgroup, the needs of BHSD, and commonly used in counties across the State of California, the [ANSA](#) was selected. The ANSA is a multi-purpose tool developed to support decision making, including level of care and service planning, facilitate quality improvement initiatives, and allow for the monitoring of outcomes of services. The ANSA demonstrates reliability and validity, and is part of the evolution of the Severity of Psychiatric Illness (SPI) tool that was created in the 1990s. BHSD has been utilizing the youth version of this tool (Child and Adolescent Needs & Strengths [CANS]) since 2012, so this supports more seamless transition of care from Children, Youth and Families (CYF) to AOA programming, and provides a systemwide view of outcomes throughout the lifespan.



### **Recommended Application of ANSA**

Use of the ANSA in AOA mental health programming will mirror expectations for CYF. The ANSA will, at minimum, be completed at intake (within 60 days of admission), every six (6) months, and at discharge. Updates can and should be done in between due dates as clinically appropriate. ANSA will be completed within or uploaded to Qualo at least monthly.

### **Certification**

All persons completing an ANSA and/or supervising staff who provide direct services must be certified in the ANSA, including annual re-certification. Certification is provided via the TCOM training site overseen by University of Kentucky's Center for Innovation in Population Health. Programs/Agencies will need to purchase coupon codes from University of Kentucky for certification and re-certification of each staff which are utilized to access online training and certification testing. Initial year is no cost for ANSA certification; subsequent years are \$16 per user, which is the group rate for 5 or more users.

Agencies will have a minimum of two (2) trainers for TCOM tools utilized in the department (CANS, ANSA, CAT). At present, all agencies with CYF programming have TCOM trainers, allowing them to support the addition of ANSA. Train-the-trainer sessions will be provided in FY26 to increase trainer numbers and support.

### **Next Steps**

- County to expand AMS contract for Qualo to add ANSA and appropriate reports allowing for continued bi-directional data entry, collection and reporting, and comprehensive outcome management.
- Reconvene workgroup and partner with University of Kentucky on item selection beyond Core Items, where needed.
  - Creation of Santa Clara ANSA with translation into all threshold languages.
  - Plan and implement full-scale roll-out and continuous quality improvement.
- Schedule County-sponsored in-person and online trainings with University of Kentucky
  - FY25: train end-users and supervisors; overview sessions for directors; begin use of ANSA tool
  - FY26: train the trainer program (will be open for ANSA as well as CANS)
- Certification process to follow trainings (required annually for users and supervisors)
- Concurrent to training and certification, build-out of ANSA in Qualo (and respective CCP EHRs, if they so choose)
- Long-term:
  - Development of a decision support model for level of care recommendations
  - Create combined CANS and ANSA tool ("Lifespan") version
  - Use as cross-over tool to ASAM Criteria