

**CENTER ASSESSMENT TOOL – MULTIDISCIPLINARY TEAM AND PERSON-CENTERED CARE PLANNING PROCESS**

CDA 7004 (NEW 01/2018)

Center Name: \_\_\_\_\_

The California Department of Aging (CDA) Community-Based Adult Services (CBAS) Branch developed this Center Self-Assessment Tool to help CBAS centers evaluate the following: (1) if their Multidisciplinary Team (MDT) and Person-Centered Care Planning processes and practices are in compliance with state and federal requirements, and (2) if their MDT’s coordination, communication and documentation processes and practices facilitate this compliance. The CDA survey team will focus on these program requirements during the center’s certification renewal on-site survey; therefore, CDA encourages centers to complete this tool in preparation for their survey but it is not a requirement. We have provided active links to the relevant program authorities.

<b>MDT Responsibilities</b>			
1. The MDT completes an initial multidisciplinary assessment prior to enrollment and determines the medical, psychosocial, and functional status of each participant. <a href="#">Welfare and Institutions Code (WIC) §14528</a> ; <a href="#">WIC § 14529(d)(1)</a> ; <a href="#">Title 22 California Code of Regulations (T-22) § 54207(a)</a> ; <a href="#">T-22 § 54211</a> ; <a href="#">T-22 § 78303(b)</a>	Yes	No	N/A
2. For the initial assessment, the MDT contacts the applicant’s physician to obtain the participant’s medical history and a statement indicating the participant’s restrictions, medications and absence of infectious disease. <a href="#">T-22 § 54207(a)(1)</a> ; <a href="#">T-22 § 78303(3)</a> ; <a href="#">WIC §14529(d)(4)(5)</a>	Yes	No	N/A
3. The MDT provides an assessment of the home environment based on a home visit within the last 12 months. <a href="#">T-22 § 54207(a)(2)</a>	Yes	No	N/A
4. The MDT determines if acute rehabilitative treatment or maintenance program services are needed. <a href="#">WIC §14529(d)(4)(5)</a>	Yes	No	N/A
5. The MDT develops an individualized plan of care (IPC) designed to meet the assessed needs and preferences of the participant based on the team’s assessment of the participant resulting from a person-centered planning process. <a href="#">WIC §14529(d)(2)</a> ; <a href="#">T-22 § 54211</a> ; <a href="#">Standards of Participation (SOP) F</a> ; <a href="#">Special Terms and Conditions (STC) 45(c)</a> ; <a href="#">42 CFR 441.301(c)(1)(2)(3)</a>	Yes	No	N/A
6. Each MDT member who is required to participate in the multidisciplinary team initial/reassessment signs the IPC. <a href="#">WIC §14529(c)(d)(2)</a> ; <a href="#">T-22 § 54211 (b)(2)</a>	Yes	No	N/A
7. The MDT’s development of the IPC is the result of a collaborative process among the CBAS provider, the participant, and if applicable the participant’s authorized representative and based on a person-centered planning process. <a href="#">SOP F</a> ; <a href="#">42 CFR 441.301(c)(1)(2)(3)</a>	Yes	No	N/A

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8. The MDT conducts a reassessment at least quarterly to review progress achieved, to review/revise treatment goals/objectives, to revise or continue the IPC, and to prepare a reauthorization request for continuing care. <a href="#">T-22 § 54215(a)(1-4)</a>	Yes	No	N/A
9. The MDT reassesses the participant at least biannually to determine the medical, psychosocial, and functional status and makes necessary adjustments to the IPC. <a href="#">WIC § 14529(d)(3)</a>	Yes	No	N/A
10. The MDT implements the requirements identified in the new ADHC/CBAS Participation Agreement ( <a href="#">CDA 7000</a> ) according to its <a href="#">Instructions</a> . <a href="#">T-22 § 54217</a> ; <a href="#">WIC § 14530(c)</a>	Yes	No	N/A
11. The center has a policy and procedure for the MDT's interdisciplinary referral process. <a href="#">WIC § 14553</a> ; <a href="#">T-22 § 78403(b)(5)</a>	Yes	No	N/A
12. The center has a policy and procedure describing the MDT's responsibilities and care planning processes including how it utilizes person-centered planning principles in the care planning process. <a href="#">WIC § 14553</a> ; <a href="#">T-22 § 78403(b)(5)(8)</a> ; <a href="#">42 CFR 441.301(c)(1-4)</a>	Yes	No	N/A
13. The center's Program Director has provided training to MDT members about their responsibilities, the MDT's care planning process including how the MDT utilizes person-centered planning principles in the care planning process. <a href="#">T-22 § 78413(d)</a> ; <a href="#">SOP H(12)</a>	Yes	No	N/A
<b>MDT Process for Team Coordination, Communication, Documentation</b>			
1. The center has a policy and procedure describing how MDT members conduct initial/reassessments, and coordinate/communicate to develop IPCs that identify/document participant needs consistently across disciplines. <a href="#">WIC § 14553</a> ; <a href="#">T-22 § 78403(b)(5)</a>	Yes	No	N/A
2. The Program Director has provided training to MDT members on how to conduct participant initial/reassessments and coordinate/communicate to develop IPCs that identify/document participant needs consistently across disciplines. <a href="#">T-22 § 78413(d)</a> ; <a href="#">T-22 § 78403(b)(5)(8)</a> ; <a href="#">42 CFR 441.301(c)(1-4)</a>	Yes	No	N/A

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3. The MDT discusses initial/reassessment results to ensure that the assessments identify participant needs and develop IPCs using person-centered principles that address/document those needs consistently across disciplines.	Yes	No	N/A
a. How often does the MDT collaborate on the MDT assessment results? Weekly      Bi-Weekly      Monthly      Bi-Monthly Other (Specify: _____)			
b. Who participates in the collaboration process?      PD      RN      SW      AC PT      OT      Speech      RD      MH      Participant      Caregiver Family Member      Other (Specify: _____)			
c. How does the center document the collaboration process? Briefly explain: _____			
d. If the MDT does not meet as a group to discuss assessment results, identify how the MDT members coordinate and communicate individual assessment results to create the multidisciplinary assessment for development of the IPC? Briefly explain: _____			
<b>Signature</b>			
Program Director (Print and Sign Name):	Date:		