



**TO:** All County & Contracted Users of SmartCare  
**FROM:** Nathan Hobbs, QI Manager; and Serina Sanchez, QA Manager  
**CC:** Chris Marlow, QAPI Section Manager  
**DATE:** July 28, 2023  
**RE:** Changes to Assessment Requirements, CANS & ANSA in SmartCare

This memo provides directions related to three areas of practice change made by SmartCare related to:

- A. 7-Domain initial assessment**
- B. Frequency of California CANS and Standard Comprehensive ANSA 3.0 assessments**
- C. Changes to the California CANS and Standard Comprehensive ANSA 3.0 assessment tools within SmartCare**
- D. Instructions on how to send assessments for review and approval in SmartCare**

**A. 7-Domain initial assessment**

For initial mental health assessments, there is no major change, other than the new CalAim Assessment. As part of the 7-domain initial assessment, providers must complete diagnosis, Mental Status Exam (MSE), California CANS/Standard Comprehensive ANSA 3.0, and the CalAim Assessment. *For Youth initial assessments*, clinical staff will continue to administer the Pediatric Symptoms Checklist (PSC-35) for children between the ages of 3 and 18 at initial and every 6 months, and ICC/IHBS/TFC screening tool at time of initial assessment and every 6 months thereafter.

**B. Frequency of California CANS and Standard ANSA Comprehensive 3.0 assessments**

*7-Domain initial assessment* – California CANS/Standard Comprehensive ANSA 3.0 must be completed as part of the client’s 7-Domain initial mental health assessment.

*Re-Assessment* – A summary of treatment, level of care, MSE, and diagnosis update are no longer required at re-assessment, however providers **must** complete a California CANS/Standard Comprehensive ANSA 3.0 re-assessment according to the periodicity requirements outlined below:

California CANS/Standard Comprehensive ANSA 3.0 assessment tools have different re-assessment periodicity requirements. For clients 20 and younger, the California CANS must be completed at least every **six months** from the initial assessment, using the re-assessment function within Smartcare.

For clients 21 and older, the Standard Comprehensive ANSA 3.0, must be completed at least **annually** from the initial assessment, also using the re-assessment function within SmartCare. Note



that these are minimum requirements. Re-assessments can occur more frequently in response to significant changes in the client’s condition, especially if that change may require a different level of care.

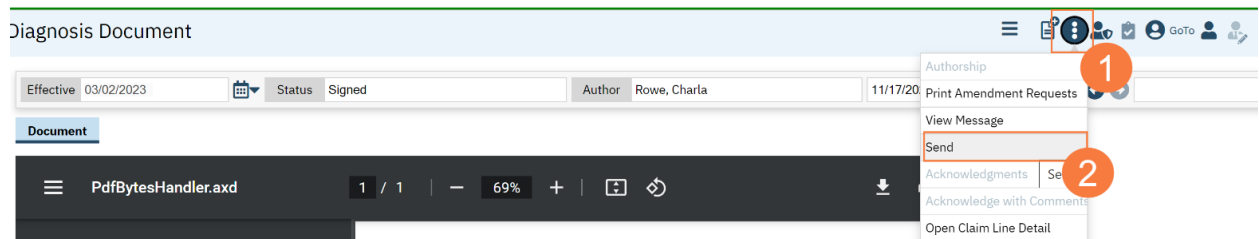
*At Discharge* - If the client has been open for more than 90 days and a California CANS/Standard Comprehensive ANSA 3.0 has been completed, then the California CANS/Standard Comprehensive ANSA 3.0 discharge assessment must be completed at discharge. If a client is deceased at time of closing, no California CANS/Standard Comprehensive ANSA 3.0 is required.

**C. Changes to the California CANS and Standard Comprehensive ANSA 3.0 assessment tools within SmartCare**

Both the CANS and ANSA tools changed as part of the SmartCare conversion. Please reference the updated manuals for additional guidance.

**D. Instructions on how to send assessments for review and approval in SmartCare**

1. Open the Assessment Document you want to send. **Click on the three dots icon** in the upper right side.
2. **Click Send** from the menu.



3. **Click in the To box and begin to type the supervisor’s name.**
  - a. To save this person as a favorite **click the Star icon.**
4. **Click the radio button** to change the priority from Normal if it applies.
5. **Uncheck** the box “Make message part of client record”
6. **Click in the empty box below** and **type the message.**



7. **Click the mail icon** to send the message.

Message Detail

A screenshot of a web-based message detail form. The form is titled "General" and contains several fields and controls. A search bar at the top right contains a magnifying glass icon and is labeled with a red circle containing the number 6. Below the search bar is a "Client" field with the text "Asano, Jason (1096)" and a search icon, labeled with a red circle containing the number 3. Below the client field is a "To" field with a dropdown menu showing "char" and a list of contacts including "Rowe, Charla" with a star icon, labeled with a red circle containing the number a. Below the "To" field is a "Priority" section with radio buttons for "Normal" (selected), "Caution/Alert", and "Urgent", labeled with a red circle containing the number 4. To the right of the priority section is a checkbox labeled "Make message part of client record" which is checked. Below the priority section is a "Subject" field with the text "Progress Note - Asano, Jason". Below the subject field is a large text area containing the text "Please review my service note.", labeled with a red circle containing the number 5.

8. **Supervisor:** review in your message center and reply to the message with approval or corrections.
9. If approved, co-sign the document.
10. If corrections needed, staff should click the Edit icon to make corrections, re-sign, and then send back to manager following the same steps above.

Any questions related to documentation, please contact [BHQA@sonoma-county.org](mailto:BHQA@sonoma-county.org).