



# THE COORDINATED ASSESSMENT SYSTEM

A guide for people with IDD, as well as family members and other people in their circle of support, to help the person participate fully in a Coordinated Assessment System (CAS) meeting.

*This guide is brought to you by Care Design NY's  
Individual and Family Advisory Board.*

## What is the CAS assessment?

The CAS assessment is the way the Office for People with Developmental Disabilities (OPWDD) plans to **identify the abilities and needs of a person with Intellectual and Developmental Disabilities (IDD).**



OPWDD has stated that it requires using the CAS to assist in improving the Life Plan. In the future the CAS may also be used to determine which services people receive. The CAS may also be used to set provider rates for those services.

***The CAS is important.***

## What happens before a CAS assessment?

**The person and/or designated support may be contacted by the Care Manager or directly by a CAS Assessor to set up the time for the assessment.**

The person should have a current Life Plan which describes their desires, needs, goals and services that they are receiving. If you do not have a copy of the Life Plan, you may obtain one from the Care Manager. Let the Care Manager know if anything needs to be added or changed. This is a chance to let the Care Manager know what is working well and what needs to be changed, so everyone can tell the Assessor about this.

## Who should come to a CAS assessment?

It is important that the people who know the person best are invited and can attend that assessment meeting to make sure the CAS information is complete and accurate. Be sure to tell the Care Manager everyone that needs to be at the meeting. You can ask the Care Manager to assist in changing the date of the meeting to make sure everyone can be there.



**Example:** *A person spends time after Day Program most days with Grandma, Aunt or sibling before returning home for the evening. They or their support may request that Grandma, Aunt or sibling are notified and scheduled to attend the assessment meeting.*

## How can I prepare for my assessment?

Some areas to think about before an assessment:

- ✓ living arrangements
- ✓ daily routine
- ✓ challenges
- ✓ programs
- ✓ transportation
- ✓ relationships
- ✓ health care

**There are many other older assessments and reports about the person that the Care Manager will share with the Assessor.** You can ask for, and should receive, a copy of all information, including any reports, that has been shared with the Assessor, before the meeting. **The Assessor will also want to know about all the person's health conditions and any medicines that they take.**

Talk ahead of time to the Care Manager to make sure that all information in the record is up to date, including all the doctors, therapists, and specialists, medications and diagnoses. The Assessor is supposed to look at the record before the meeting.

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Please also be prepared to advise the Assessor about any behavioral or emotional challenges and support needs of the person and about whether these conditions are frequent and whether they occurred in the recent past. The CAS collects such information in many cases only with respect to the past 3 days of the person's life.



**Example:** *The person has received a change of medication for recurring seizures. Make sure the medication change is shared with that Care Manager. You should also have that available during the assessment.*



## What happens during a CAS assessment?

During the CAS assessment meeting, the Assessor will ask many questions related to how the person goes about their daily life and what support they need to assist in daily activities such as preparing meals, traveling, bathing and dressing. They will ask how they are feeling and how they let people know what they need. They will ask about other challenges the person has and what works best. To ensure that the assessment result reflects the person's abilities, needs and desires, the person and those who support them, should answer the questions as best and as accurately as they are able.



**NOTE:** *If the assessment meeting is going on too long or if the person becomes tired, uncomfortable, or upset, you can ask for the meeting to continue at a different time. This meeting is not supposed to be too stressful for the person. It is best if the person participates in the whole assessment meeting. However, the person can be excused if that is the preference of the person and the person's advocates.*

## What happens after a CAS assessment meeting?



The Care Manager will send the person, family member or other members of the circle of support a **Summary of the Assessment when it is finished**. The Summary documents are a series of very short documents generated from the answers the Assessor put in the computer and may not be easy to understand. Please make sure that the Care Manager reviews all of these Summary documents with you.

You may ask questions about parts of the Summary documents which are not clear or which you think are incorrect. Your Care Manager has been trained on how to contact OPWDD with your questions and concerns, on your behalf and is prepared to help you raise your questions and concerns with OPWDD. You may ask that your Care Manager raise your questions about the CAS Summary Documents with OPWDD on your behalf, or you may raise those questions or concerns about the Summary documents directly with OPWDD, CAS Department. Information about how to do so will be written in your summary documents.



**NOTE:** Questions to OPWDD must be raised, as soon as possible, after you receive your Summary documents. Please inform your Care Manager about any questions on your Summary Documents you raise directly with OPWDD and please share any responses you receive from OPWDD on those questions.

**Do you still have questions about CAS Assessments and meetings?  
Contact your Care Manager.**