

2026 NY ALLIANCE CONFERENCE PRESENTATION



CAS Process Improvement

A Collaborative Pilot Between Person Centered Services (PCS),
The Arc Erie County, and The Office For People With Developmental
Disabilities (OPWDD)

Improving assessment accuracy, cross-agency data alignment, and front-end preparation
for individuals with intellectual and developmental disabilities (I/DD).

PHASE 1

Arc Erie: Internal Data Review

Before any improvements could be made, Arc Erie needed a clear picture of where things stood.

✓ Completed

Assessments confirmed on file and up to date

⚠ Overdue

Assessments past their due date requiring follow-up

✗ Missing

Assessments with no record found in CHOICES

Data was pulled from CHOICES, the state electronic health records (EHR) system, and reviewed in phased order: Residential → Day → Vocational programs.

Purpose: Establish visibility into the current Coordinated Assessment System (CAS) landscape and create an internal baseline.

Status: ✓ Complete – Internal EHR tracking space created to support ongoing reporting.

Data Alignment with Person Centered Services

With an internal baseline in hand, Arc Erie and Person Centered Services met to compare records and close the gap.

1

Stakeholders Identified Concerns

Process and accuracy gaps flagged by both PCS and Arc Erie

2

Joint Meeting Held

PCS and Arc Erie reviewed the CAS process together and scoped the pilot

3

Member Lists Reconciled

Cross-referenced members served by both organizations with a current CAS on file

4

Discrepancies Resolved

Manual reconciliation completed at the agency level

Why This Matters

When the agency and Care Coordination Organization (CCO) aren't aligned, the individual, their family, and support staff are left unprepared for the assessment – and the assessor lacks the full picture. Misalignment doesn't just create data errors; it can directly impact the services and supports someone receives.

Partnership with Person Centered Services

Once data was aligned, Arc Erie and PCS formalized how they communicate and share information going forward.



Weekly Advance Notifications

Every Monday, PCS identifies Arc Erie members selected for an upcoming CAS and alerts Arc Erie's designated Single Point of Contact (SPOC) – giving programs time to prepare.



Bi-Directional Data Sharing

Documents uploaded by Arc Erie flow automatically into the PCS EHR for the care coordinator and CAS assessor to review before the assessment.



Ongoing Collaboration

Regular communication ensures the full support team – including families – knows what to expect and can participate meaningfully.

Front-End Preparation

Accurate assessments start with good preparation. Arc Erie & Person Centered Services are focused on making sure individuals are well-represented before the assessor ever arrives.



Documentation

Improving internal records completed before each assessment



Staff Awareness

Building team knowledge so everyone knows what to expect and how to prepare



Portal Integration

Exploring direct document sharing with PCS via portal



Life Plan Alignment

Timing CAS assessments to align with Life Plan meetings to reduce duplication



The Goal

Every individual should be accurately and fully represented during their CAS. This phase ensures the right information is in the right hands – before the assessment begins.

Cross-Agency Coordination

Arc Erie and PCS meet regularly to keep the pilot on track, aligned with state expectations, and continuously improving.

CAS Activity & Data Alignment

Reviewing completion rates and reconciling records between both organizations

Operational Coordination

Aligning day-to-day workflows so both sides work in sync

Informing OPWDD

Insights from this partnership help inform OPWDD on what's working at the provider and CCO level — supporting better policy planning, process refinement, and implementation across the system.

No Silos

Data is shared openly and transparently at all levels between Arc Erie and PCS

Accurate Tracking

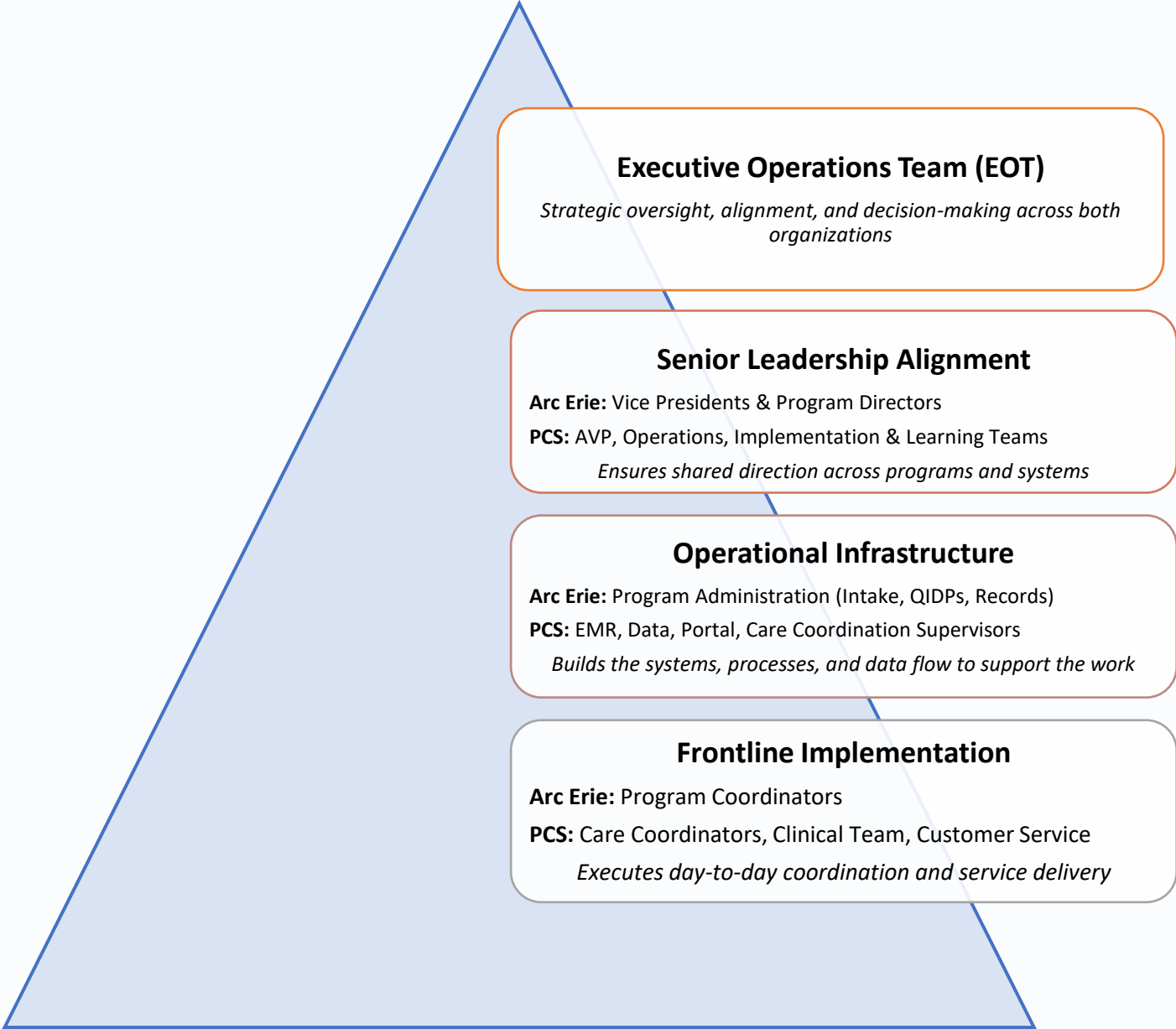
Arc Erie maintains precise records to support accountability and reporting

Continuous Improvement

Process refinement is an ongoing, shared responsibility — not a one-time fix

Internal Oversight & Participation

This work is coordinated across multiple levels of each organization – ensuring both leadership alignment and frontline execution.



Summary: Where We Stand

Here's a snapshot of where the pilot stands today across all five phases.

Legend: ✓ = Complete | ✓ Live / Active = Operational | ⌚ = In Progress

Baseline Established

✓ **Complete** – All CAS records pulled, categorized, and manually verified across every program

Data Verified

✓ **Complete** – Arc Erie and PCS records reconciled; discrepancies identified and resolved

Partnership Active

✓ **Live** – SPOC notification system operational; bi-directional data sharing in place

PCS Rollout Underway

⌚ **In Progress** – Weekly alerts and document upload process expanding to all partner agencies (Q1 2026)

Preparation Ongoing

⌚ **In Progress** – Staff education, documentation improvements, and portal integration underway

Monthly Oversight in Place

✓ **Active** – Regular reviews, trend monitoring, and process refinement are now standard practice

Next Steps

The pilot is actively evolving. Here's what Arc Erie and PCS are working toward next.

In Progress



Align Assessment Timing

Lining up CAS/CANS assessments with initial and annual life plans
– **Beginning May 2026**



Reduce Assessment Redundancy

CAS/CANS as the CCO foundation; supplemental questions only
– **Cross Walk has begun**



EHR Interconnection

CAS/CANS results to populate the CCO's EHR for data collection and CAPS – **Discussions in process**

Planned



Improved Training

Updated training for care coordinators, staff, and all CAS stakeholders



Care Action Plans for Life Planning

Use the Care Action Plans (CAPS) to directly inform goals and life plan development

Key Takeaways & Resources

What we've learned – and what still needs attention.

Key Takeaways



Improved Accuracy

Structured processes lead to more accurate CAS data and better outcomes for individuals.



Stakeholder Feedback Is Essential

Ongoing input from providers, CCOs, and families keeps the pilot grounded in real experience.



OPWDD Partnership

Future improvements require working closely with OPWDD at the state level.



CHOICES Reporting

System improvements implemented over the last year.



Key Agency Resources Needed

- IT/Electronic Health Record
- Data
- Qualified Intellectual Disabilities Professionals (QIDPs)
- CAS/CANS Single Point of Contact
- Training



The Bottom Line

Better processes lead to better data – and better data leads to better outcomes for individuals with I/DD. This pilot proves that cross-agency collaboration works. It's replicable, scalable, and just getting started.

Thank You

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Questions? We welcome the conversation.



**PERSON
CENTERED
SERVICES**





**Office for People With
Developmental Disabilities**

Summary Of CAS & CANS Questions Asked of OPWDD

New York Alliance for Inclusion & Innovation

APRIL 15, 2026

2025 CAS/CANS COMMUNICATIONS - WHAT IS CAS?

CASsie and Veronica

<https://youtu.be/jkUHWwFnIpg>



2025 CAS/CANS ASSESSMENT COMMUNICATIONS - WHAT HAVE WE DONE?

- In 2025, OPWDD prioritized increased understanding of the agency's Coordinated Assessment System (CAS) and Child and Adolescent Strengths and Needs (CANS) assessment tools and processes.
- A new educational video was posted to the OPWDD website to help people and families better understand the CAS assessment.
- **Informational sessions for ~ 2,300 attendees**
 - Care Coordination Organizations (CCO) partners and provider agency leadership / their key staff = 674 people
 - In-person sessions with people and families = 330
 - Public Live Webinars = 349
 - CCO Care Managers = 536
 - OPWDD Regional Office and State Operations staff = 407
- OPWDD partnered with CCO leads to launch and post a 5-part training series for Care Managers that supports understanding of the entire assessment process from scheduling to concerns review.

2025 CAS/CANS COMMUNICATIONS – WHAT DID WE SAY?

Key messages:

- Enhanced OPWDD's mission to expand understanding of the CAS and CANS assessment tools and the process to support assessment
- Described technical advances of the CAS/CANS assessments when compared to existing Developmental Disabilities Profile 2 (DDP-2).
- Discussed the planned eventual retirement of the DDP-2, and use of CAS/CANS assessment information to replace DDP-2 processes.
- Provided an overview of OPWDDs plan to move toward an annual CAS assessment cycle.
- OPWDD development of CAS assessment measures to mirror functions of the DDP-2:
Service Ranges, Behavioral Health Measure, Health-Related Supports Measure
- Described the value of enhanced assessment data sharing with CCOs and provider agencies.

OPWDD DATA SHARING WITH CCOs- WHAT HAVE WE ACCOMPLISHED?

- In 2023, OPWDD began meetings with CCOs, electronic health record (EHR) vendors, and Information Technology Services (ITS) to review steps needed for CCOs to begin receiving CAS/ CANS assessment information.
- Effective September 9, 2024, CCOs EHRs began receiving weekly data files containing person-level information on assessment type, administration date, finalization date, CAPs and Scales.
- This is important because it allows us to have:
 - Efficiency in assessment planning by knowing assessment dates and future assessment needs.
 - Efficiency in care planning by providing high level indicators where a person might benefit from additional support or discussion.
 - Leverage of data by each CCO to identify important trends and risk indicators within the population served.
 - Monitor changes within the population over time.

OPWDD DATA SHARING WITH PROVIDERS – WHAT WILL WE DO?

- 2024 we initiated an assessment-specific OPWDD/Alliance partnership.
- 2025 Alliance Provider Working Group formalized.
- August 2025 pilot project to share CAS assessment data with working group members.
- Future will allow OPWDD/ITS to review technical specifications needed for residential provider agencies to begin receiving CAS/CANS assessment information via Choices. Completion date TBD.



**Office for People With
Developmental Disabilities**