

Policy and Procedure	Date Issued	Policy Number CSB – 615	Page 1
Milwaukee County Behavioral Health Division Community Services Branch	Date Revised	Subject: Assessment	

1. POLICY:

Per DHS 36.07 (5) (m) and 36.16 an accurate comprehensive assessment shall be conducted for each eligible applicant of Comprehensive Community Services in order to identify strengths, needs, and desired outcomes of the consumer and to evaluate progress towards these outcomes. The assessment will be welcoming and conducted in a person-centered, trauma-informed, culturally competent, and recovery oriented focus of care.

2. PROCEDURE

- A. FACILITATION. All of the following shall occur concerning the assessment:
1. The assessment process and the assessment summary shall be completed within 30 days of receipt of an application for services. The assessment process shall be explained to the consumer and, if appropriate, a legal representative or family member.
 2. The assessment process shall be facilitated by a care coordinator.
 3. Substance use diagnoses shall be established by a substance abuse professional. An assessment of the consumer's substance use, strengths and treatment needs also shall be conducted by a substance abuse professional.
 4. The assessment process shall incorporate to the greatest extent possible, the consumer's unique perspective and own words about how he or she views his or her recovery, experience, challenges, strengths, resources and needs in each of the domains included in the assessment process that are stage matched.
- B. ASSESSMENT CRITERIA. The assessment shall be comprehensive and accurate. The assessment shall be conducted within the context of the domains listed in this policy and any other domains identified by the CCS, and shall be consistent with all of the following:
1. Be based upon known facts and recent information and evaluations and include assessment for co-existing mental health disorders, substance-use disorders, physical or mental impairments and medical problems.
 2. Be updated as new information becomes available.
 3. Address the strengths, needs, recovery goals, priorities, preferences, values and lifestyle of the consumer.
 4. Address age and developmental factors that influence appropriate outcomes, goals and methods for addressing them.
 5. Identify the cultural and environmental supports as they affect identified goals and desired outcomes and preferred methods for achieving the identified goals

Policy and Procedure	Date Issued	Policy Number CSB – 615	Page 2
Milwaukee County Behavioral Health Division Community Services Branch	Date Revised	Subject: Assessment	

6. Identify the consumer's recovery goals and understanding of options for treatment, psychosocial rehabilitation services and self-help programs to address those goals.

C. ASSESSMENT DOMAINS. The assessment process shall address all of the following domains of functioning:

1. Life satisfaction
2. Basic needs
3. Social network and family involvement. In this paragraph "family involvement" means the activities of a family member to support a consumer receiving psychosocial rehabilitation services. Except where rights of visitation have been terminated, the family of a minor shall always be included. The family of an adult consumer may be involved only when the adult has given written permission.
4. Community living skills
5. Housing issues.
6. Employment
7. Education
8. Finances and benefits
9. Mental health
10. Physical health
11. Substance use
12. Trauma and significant life stressors
13. Medications
14. Crisis prevention and management
15. Legal status
16. Any other domain identified by the CCS

D. ABBREVIATED ASSESSMENT.

1. The assessment in sub. (3) may be abbreviated if the consumer has signed an admission agreement and one of the following circumstances apply:
 - a. The consumer's health or symptoms are such that only limited information can be obtained immediately.
 - b. The consumer chooses not to provide information necessary to complete a comprehensive assessment at the time of application.
 - c. The consumer is immediately interested in receiving only specified services that require limited information.
2. An assessment conducted under this subsection shall meet the requirements under sub. (3) to the extent possible within the context that precluded a comprehensive assessment.
3. The assessment summary required to be completed under sub. (6) shall include the specific reason for abbreviating the assessment.

Policy and Procedure	Date Issued	Policy Number CSB – 615	Page 3
Milwaukee County Behavioral Health Division	Date Revised	Subject: Assessment	
Community Services Branch			

4. An abbreviated assessment shall be valid for up to 3 months from the date of the application. Upon the expiration date, a comprehensive assessment shall be conducted to continue psychosocial rehabilitative services. If a comprehensive assessment cannot be conducted when the abbreviated assessment expires, the applicant shall be given notice of a determination that the consumer does not need psychosocial rehabilitation services pursuant to the requirements of s. DHS 36.14 (3) (b).

E. **ASSESSMENT SUMMARY.** The assessment shall be documented in an assessment summary that shall be prepared by a member of the recovery team and shall include all of the following:

1. The period of time within which the assessment was conducted. Each meeting date shall be included.
2. The information on which outcomes and service recommendations are based.
3. Desired outcomes and measurable goals desired by the consumer, always ensuring the consumer has voice, access and ownership to the IRP.
4. The names and relationship to the consumer of all individuals who participated in the assessment process.
5. Significant differences of opinion, if any, which are not resolved among members of the recovery team.
6. Signatures of persons present at meetings being summarized.



Reviewed and Approved by: _____

Jennifer Wittwer, Associate Director
Adult Community Services Branch