

CSA – Assessment Training

Purpose:

CSA standardized training processes will ensure that all Assessors meet competency requirements for the required assessment tools (see attachment for Iowa CSA Designated Assessment Tools).

Identification of Roles:

Assessor – Will meet competency requirements for the required assessment tools.

Assessors must be proficient in:

- Virtual assessment procedures and best practices
- Scheduling Assistant Manager (SAM)
- Assessment platforms (Civica, Outcomes, and LOCUS Online)
- loWANS database
- Iowa Medicaid Portal Access (IMPA) database

Manager – Will ensure that the Assessors have met all competency requirements for the required assessment tools prior to administering assessments when initially hired and annually thereafter.

Trainer/QA Specialist – Will ensure proper training completed with the Assessor and that the Assessor is competent in assessment tool prior to completing independently.

Performance Standards:

Assessors must meet the following performance metrics for each assessment type:

InterRater Reliability Schedule			
Assessment	Frequency		Score Req
	> 1 year	1 year +	
iRAI	Bi-Annual	Annually	85%
Peds-HC	Bi-Annual	Annually	85%
ChYMH	Bi-Annual	Annually	85%
ChYMH-DD	Bi-Annual	Annually	85%
iRAI-ID	Bi-Annual	Annually	85%
Early Years /Comp	Bi-Annual	Annually	85%
OYA/ENA	Bi-Annual	Annually	85%
(CA)LOCUS	Quarterly	Bi-Annual	80%
MPAI	Bi-Annual	Annually	80%

Assessors will conduct a minimum average of two (2) assessments per month, with a lapse of no more than three (3) months between assessments. Assessors participate in continuing education of assessment tools.

Path of Business Procedure:

Step 1: Initial training begins with three (3) to four (4) days of classroom training which includes: compliance and safety measures, CSA standard operating procedures, person-centered and motivational interviewing techniques, assessment completion performance measures, conflict of Interest policy and training on State and internal IT systems.

Initial systems training includes:

- Civica
- Outcomes
- LOCUS Online
- SAM
- IoWANS
- IMPA

Step 2: The Assessor completes independent study of assessment manual and assessment form(s). Assessor will participate at the in-person and virtual training with the Telligen Trainer(s).

In the classroom, Assessors discuss scoring methods and item definitions under the Trainer's guidance while sharing effective techniques. Through guided role-play exercises, participants practice conducting assessments, experiencing being assessed, and observing others' assessments, all while receiving instructor feedback.

Training includes both in-person and virtual assessment methodologies, with specific focus on:

- Virtual interview techniques
- Digital platform navigation
- Remote assessment documentation
- Virtual respondent engagement strategies
- Motivational Interviewing techniques
- Soft skills

Step 3: The Assessor is encouraged to conduct full practice assessments with a family member, friend or other Assessor in role-play. Case studies may also be offered to the Assessor for additional practice.

Step 4: The new Assessor observes three (3) to four (4) assessments completed by a mentor or trained Telligen Assessor. The new Assessor will start to complete sections of the assessment initially and then progress to completing the entire assessment on their

own with a seasoned Telligon Assessor observing them to provide feedback.

Prior to completing an Inter-Rater Reliability (IRR) Review, a Trainer/QA Specialist will observe the Assessor. The Assessor completes side-by-side assessments until the Trainer/QA Specialist confirms proficiency.

A new Assessor will begin to complete assessments independently after the Trainer/QA Specialist determines proficiency via an IRR review.

Step 5: Inter-Rater Reliability Review: Assessor completes testing within a training application and must achieve an 80-85% passing grade in each course.

If appropriate testing options are not available, the Assessor must pass a corresponding 25 pt quiz with 80%.

The Assessor provides their completion certificates to the Manager.

For MPAI-4 and LOCUS/CALOCUS, the Assessor completes Training Vignettes/Case Studies. A proficiency rating of 80% must be achieved to meet competency standards for using the MPAI-4 and LOCUS/CALOCUS assessment instruments.

Testing is completed annually. Continuing education on the required assessment tools is provided as needed.

Proficiency testing includes demonstration of competency in:

- Virtual assessment delivery
- Digital platform usage
- Communication systems management
- Remote documentation procedures
- Motivational Interviewing techniques
- Soft skills

Forms/Reports: N/A

RFP Reference:

1.3.1.5
1.3.2.D
1.3.2.E

Interfaces:

Civica
Outcomes
LOCUS Online

IoWANS
IMPA
SAM
JIRA
Talkdesk

Attachments:

HCBS-approved standardized assessment tools (Iowa CSA Designated Assessment Tools 2 1.pdf)