

San Mateo County Behavioral Health Services
BHRIS Policy 03-04, Attachment B revised January 2014

Routine Requests and the Degree of Disclosure Allowed

Requester	Purpose	Disclosures
Aging and Adult Services	Investigate possible dependent or older adult abuse reported by BHRIS; to identify clients who may call 24-hour help-line	Full disclosure as needed to support investigation; access to Avatar for registration/services data.
Ambulance Company	Obtain demographic and insurance information for billing.	Insurance information; confirmation that service was included on BHRIS contract
Attorney*	Requires information re: MH condition in support of legal action.	Specific information requested and authorized
Child Protective Services	Investigate possible child abuse reported by BHRIS	Full disclosure as needed to support investigation
Collection Agency	Obtain payment on past accounts	File of client names, addresses, dates of service and amount owed
Coroner	Investigates deaths by suspicious circumstances	Specific information requested; name of client and treatment team when BHRIS is requesting coroner's report
Correctional Facility (YSC, Jails) – Health Services	Continuity of BHRIS care	Full access to BHRIS treatment information
County Controller	Cut checks in support of Representative Payee functions	File of client names, addresses of client or vender, amount of payment
Department of Health Care Services (DHCS)	Maintain statewide client data base (CSI); substantiate care provided for payment (Medi-Cal); program reviews for QI purposes	Specific information requested per regulation or contract
Disability determination*	Evaluate individual's behavioral health condition in support of disability benefits	Specific information requested
Health Oversight Agencies	Monitor effectiveness and efficiency of BHRIS system; assure compliance with laws (civil rights, Managed Care, ADA, safety)	Specific information requested to agencies authorized by law to perform audits, licensing, investigations, and inspections
Health Plan of San Mateo	Treatment planning for clients common to both plans; additional program responsibilities	Specific information requested by MHP or HPSM; Full access to medical record for treatment purposes as in a clinical case conference

Housing Authority	Applications for supplemental housing, including Shelter+ Care and Aftercare	Demographic Information; Diagnosis, Medication and Drug/Alcohol History
Insurance Company	Substantiate care provided for payment	Specific information requested in claims attachment request
Law Enforcement	Investigate missing persons, accidents or crimes; assist in 5150 process	Non-medical information only (demographics, etc.); in 5150 situation, information to extent necessary to assist with or write hold.
Medi-Cal Benefits Analyst	Assist in determining eligibility and obtaining benefits	Name of client and assistance with making appointments at MH clinic
Medicare	Substantiate care provided for payment	Specific information requested in claims submission regulations
Behavioral Health Commission	Oversight of BHRS Services as required by law	Operational data; Deidentified Quality Improvement Data
National Security	Varies	Specific information requested by agency (CIA, FBI, Etc.)
Pharmaceutical Products Data Bases	Report reactions to medications or problems with products	Specific information needed
Public Health	Prevent or control disease	Specific information needed
Researcher*	Varies with research involving treatment or research requiring data analysis	For treatment, on site: entire chart For other research, information per IRB approved protocol
Social Security*	Evaluate individual's behavioral health condition in support of application for benefits	Specific information requested; ongoing reports by staff to SSI re continuing eligibility and payment status
Vocational Services	Coordination of Vocational Services and BHRS Services	Access to Avatar for registration purposes, input of services provided; clinical information including assessment, medications and other information as needed for coordination of care
Workers' Compensation	Evaluate individual's behavioral health information	Discharge summary; other specific information requested for benefits

* Subpoena, court order or authorization may be required. Verify before release.