



ACCESS UM TBS AUTHORIZATION REQUEST WORKFLOW

1. REFERRAL TO THERAPEUTIC BEHAVIORAL SERVICES (TBS)
2. TBS RE-AUTHORIZATION

REFERRAL TO THERAPEUTIC BEHAVIORAL SERVICES (TBS)

Only BHRS youth regional clinics or BHRS SED contracted agency providers will refer SED (21 and under) clients to Therapeutic Behavioral Services (TBS) at Fred Finch (FF). All BHRS clients who are referred for TBS services must remain open to a youth regional clinic and/or contracted BHRS agency provider with an assigned clinician for consultation and care collaboration with Fred Finch.

1. **BHRS Regional Clinics/ BHRS SED Contracted Agency Providers** will email **signed** and fully completed TBS Referral Form along with updated client assessment and active client Medical insurance eligibility to HS_BHRS_ACCESS_UM@smcgov.org to request TBS services at Fred Finch. The same email is copied to BHRS or Contracted agency supervisor.
2. **BHRS Access UM Admin** opens UM Inbox and processes the referral. If TBS referral is incomplete, Admin should email referring clinician to request necessary information, and copy UM inbox. If referral is complete, admin will:
 - Verify insurance coverage.
 - Open an Access Call Center episode with brief ICI, scan the form and referral **email** into Avatar under “Referrals”, assign the episode to UM coordinator, move the referral to “TBS Referral” folder, and tag the request blue.
 - If client does not have active or eligible insurance, open an Access Call Center episode with brief ICI, scan the form and referral email into Avatar under “Referrals”, assign the episode to UM coordinator, move the referral to “TBS No Insurance” folder, and tag “No Insurance”/ blue. Admin will forward a copy of referral email to UM coordinator, UM supervisor, and Admin supervisor with insurance details.
3. **BHRS Access Outpatient UM Coordinator** will review the referral and make the TBS prior authorization approval decision using the referral form, supporting documents received, or chart review in Avatar if necessary to establish medical necessity and to ensure criteria is met. Access UM will authorize no longer than 30 days for assessment and create Service Authorization in Avatar with 720 units (1 unit=1 min.) of TBS CPT code **H2019CA** for Fred Finch TBS (**Therapist # 57385**).
4. **BHRS Access Outpatient UM Coordinator**, within 5 business days, via **secure email**, sends the TBS referral, client assessment, treatment plan (if available), and Service Authorization to FF smtbsreferrals@fredfinch.org/ JenniferJimenez@fredfinch.org and copies BHRS Youth Regional Clinics/ BHRS SED Contracted Agency Providers, MIS billing



- HS_BHRS_TBS_MIS_Authorizations@smcgov.org, and Access UM HS_BHRS_ACCESS_UM@smcgov.org. UM Coordinator will indicate to admin that the service authorization should be mailed to the client, and remaining documents will be scanned into client chart. The client authorization email will be moved to the “Scan and Mail” folder. The client’s name and mental health number should be included in the email content.
5. **BHRS Access Outpatient UM Coordinator** will complete an ICI contact note in Avatar, copy this ICI note to **Access Admin** requesting the authorization to be mailed to the client.
 6. **BHRS Access Admin** will scan the authorization documents into Avatar under “Authorization Letters” and mail a copy of the authorization to the client. Admin will move the approved authorization email to the UM inbox “TBS Assessment Auth” folder and mark completed.
 7. **BHRS Access admin** will respond to the alert in Avatar with the date and time the letter was mailed for confirmation.
 8. **BHRS Access Outpatient UM Coordinator** will finalize the Access ICI.
 9. **BHRS Access Outpatient UM Coordinator** will enter the TBS referral into the tracking log. **BHRS shared Drive ->Access Assessment & Treatment > UM> TBS > FFYC TBS Authorization Log > FF Referrals**
 10. **FRED FINCH** will reply all to the **secure email** to confirm the referral is received and provide name/ contact information of the assigned Fred Finch clinician **within 3 business days** upon receipt of the referral.
 11. **FRED FINCH** will open a Fred Finch Episode in Avatar and assess the client. Fred Finch will send Access UM Prior Authorization Request Form via **secure email** to: HS_BHRS_ACCESS_UM@smcgov.org to request authorization based on medical necessity. **Services must be authorized prior to treatment.**
 12. **FRED FINCH clinician** will complete assessment/ treatment plan and upload them in Avatar.

**TBS RE-AUTHORIZATIONS**

1. **FRED FINCH treatment team** and **BHRS Regional Clinics / BHRS SMI Contracted Agency Providers** will meet prior to end of existing authorization to review client's progress and decide if re-authorization is needed.
2. **FRED FINCH treatment team** will submit Access UM Prior Authorization Request Form to HS_BHRS_ACCESS_UM@smcgov.org at least five (5) days prior to end of existing authorization if both FF and BHRS treatment teams agree re-authorization is needed. FF must indicate consultation/collaboration with the client's BHRS youth treatment team regarding the UR decision as part of the request. **Services must be authorized prior to treatment.**
3. **BHRS Access Admin** opens TBS Inbox and processes the TBS Prior Authorization Request.
 - Verify insurance coverage.
 - Open brief ICI on Fred Finch episode, scan the form and **email** into Avatar under "Authorizations Forms", assign the episode to UM coordinator, move the request to "TBS URC Re-Auth Request" folder, and tag the request blue.
 - If client does not have active or eligible insurance, open an Access Call Center episode with brief ICI, scan the form and referral email into Avatar under "Referrals", assign the episode to UM coordinator, move the request to "TBS No Insurance" folder, and tag "No Insurance"/ blue. Admin will forward a copy of referral email to UM coordinator, UM supervisor, and Admin supervisor with insurance details.
4. **BHRS Access Outpatient UM Coordinator** will review the request and make the TBS prior authorization decision based on review of progress summary, supporting clinical documentation received, or chart review in Avatar if necessary to determine medical necessity.
5. **BHRS Access Outpatient UM Coordinator** will create Service Authorization in Avatar and enter units of TBS CPT code **H2019CA** approved for Fred Finch TBS (**Therapist # 57385**). The authorization should be no more than 90 days. Services must be authorized prior to treatment.
6. **BHRS Access Outpatient UM Coordinator**, within 5 business days, via **secure email**, sends the Service Authorization/approved Auth Request to Fred Finch smtbsreferrals@fredfinch.org/ JenniferJimenez@fredfinch.org and copies BHRS Youth Regional Clinics/ BHRS SED Contracted Agency Providers, MIS billing HS_BHRS_TBS_MIS_Authorizations@smcgov.org, and Access UM HS_BHRS_ACCESS_UM@smcgov.org. The client's name and mental health number should be included in the email content. Access UM Coordinator will indicate to admin that the service authorization should be mailed to the client, and remaining documents



will be scanned into client chart. The client authorization email will be moved to the "Scan and Mail" folder. The client's name and mental health number should be included in the email content.

7. **BHRS Access Outpatient UM Coordinator** will complete an ICI contact note in Avatar, copy this ICI note to Access Admin requesting the authorization to be mailed to the client.
8. **BHRS Access Admin** will scan the authorization into Avatar under "Authorization Letters" and will mail a copy of the authorization to the client. Admin will move the approved authorization email to the UM inbox "TBS URC Re-Auth folder" and mark completed.
9. **BHRS Access admin** will respond to the alert in Avatar with the date and time the letter was mailed for confirmation.
10. **BHRS Access Outpatient UM Coordinator** will finalize the Access ICI.
11. **BHRS Access Outpatient UM Coordinator** will enter the TBS re-auth request into the tracking log. **BHRS shared Drive ->Access Assessment & Treatment > UM> TBS > FFYC TBS Authorization Log > FF Re-Auth**
12. **BHRS Regional Clinics/ BHRS SED Contracted Agency Providers** will continue providing SED mental health services to client in combination with treatment at Fred Finch.
13. **FRED FINCH treatment team** and **BHRS Regional Clinic/ BHRS SED Contracted Agency Providers** will meet regularly to coordinate client services and treatment planning. Case conferences may be requested at any point to review client's progress and discharge planning.
14. **FRED FINCH treatment team** and **BHRS Regional Clinics / BHRS SED Contracted Agency Providers** will meet prior to end of existing authorization to review client's progress, authorization decisions, or plan for discharge.
15. **FRED FINCH treatment team** will submit Discharge Summary or Prior Authorization Request to HS_BHRS_ACCESS_UM@smcgov.org and discharge Fred Finch episode in Avatar.
16. **BHRS Access Admin** will scan the summary under "Discharge Summary," move it to "Discharge Summary" folder, and red flag the email if discharge is received.
17. **BHRS Access UM Coordinator** will check the "Discharge Summary" folder periodically, truncate the Service Auth that is still active, make an ICI note of the discharge, and advise Fred Finch to close episode if it has not been closed already.
18. **BHRS Access UM Coordinator** will enter this information to tracking log and make an ICI Contact Note in Avatar.