

# BHRS Mental Health Documentation Updates 2019

Coding for Progress Notes & Documenting Services



- Write a Progress Note every time that you:
  - ► Meet with a client/family
  - ► Address the client's needs/talk with others about the client's needs
  - ► Complete documentation for the client chart/care



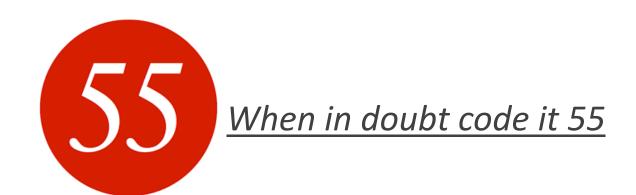
- ▶ Write a Progress Note for Every Service
- ► Finalize the Progress Note
- Contractors sign the Progress Note



Billable Service Time and Non-Billable Service
Time comes from your Progress Notes.



# No progress note = No productivity





# How Many Progress Notes Should This Clinician Write?



9:00 am:

Met with client # 1 to conduct an Assessment



11:25 am:

Met with a client # 2's probation officer



10:30 am:

Met with client # 2 for therapy session



12:15 pm:

Called residential facility to get an update on client #3



11:00 am:

Talked with client #1's social worker to find housing



## 2:15 pm:

Logged into Avatar & completed Suicide Assessment Screening for client # 2



# **Answer: 6 Progress Notes**



#### 9:00 am:

Met with client # 1 to conduct an Assessment (code 5 Assessment)



#### 11:25 am:

Met with a client # 2's probation officer (code 51 case management)



## 10:30 am:

Met with client # 2 for therapy session (code 9 therapy)



## 12:15 pm:

Called residential facility to get an update on client #3 (code 51 Case Mgmt.)



## 11:00 am:

Talked with client #1's social worker to find housing (code 51 case management)



## 2:15 pm:

Logged into Avatar & completed Suicide Assessment Screening for client # 2 (code 5 Assessment)



# How Many Progress Note Should This Case Manager Write?



#### 9:00 am:

Met with client # 1 to talk about his recent court date to arrange for transportation



11:25 am: Picked client up and drove client to MD appointment



# 10:00 am:

provided rehab group with 7 clients



## 1:00 pm:

Went to the gym



#### 11:00 am:

Talked with client #1 over the phone to complete a treatment plan



## 3:15 pm:

Logged into Avatar and completed Treatment Plan for client #2



#### SAN MATEO COUNTY HEALTH

# **BEHAVIORAL HEALTH**& RECOVERY SERVICES

# **Answer:** 11 Progress Notes



#### 9:00 am:

Met with client # 1 to talk about his recent court date to arrange for transportation



11:25 am: Picked client up and drove client to MD appointment (code 55)



# (code 55)

10:00 am:
Provided rehab
group with 7
clients (code 70 –
write 7 notes)



# 1:00 pm: Went to the gym (no note)





#### 11:00 am:

(code 6)

Talked with client #1 over the phone to complete a Treatment Plan



## 3:15 pm:

Logged into Avatar and completed
Treatment Plan for client #2 (code 6)

# Code These 55



# NON-billable services DO NOT address the mental health issue.

# **Including:**

- addressing legal problems
- going to Court
- housing issues
- SSI- writing letters, completing forms,
   & questionnaires.
- substance use/abuse
- rep-payee
- transportation of a client
- food shopping
- social groups and outings
- taking the client to lunch
- solely physical health issues

- moving the client from one placement to another
- taking client to the bank or DMV
- getting the client a telephone or bus pass
- attending resource or job fairs
- running errands
- taking the client for lab work or to Planned Parenthood
- VRS/DOR or community service support without clear link to mental health issues
- preparation/buying supplies for a group
- translation only.



#### SAN MATEO COUNTY HEALTH

# **BEHAVIORAL HEALTH**& RECOVERY SERVICES

# **Billing for Travel Time**





- Travel time is billable when it is a component of a billable service.
- No client/no show --- may add to a 55 missed visit progress note.
- Billing for a service while driving is questionable??? But may be billed at times.



Round-trip travel time from a provider site to an off-site location to provide a billable service = billable, add to "Other billable Service Time" ----drive to 1<sup>st</sup> client, drive to 2<sup>nd</sup> client



- Travel time between provider sites = not billable, add to "Other Non-Billable Service Time"
- Travel time from a staff's home to a provider site = not billabledon't add this time to progress notes
- Travel time from staff's home to client's home = not billable-Instead bill for the amount of time it would have taken to drive from your office to the client "Other billable Service Time"



► The Assessment and Treatment Plan <u>MUST</u> be completed before <u>Planned Services</u> are provided.

► All <u>Planned Services</u> that your team/and support teams provide <u>MUST be on the</u> Treatment Plan.



#### SAN MATEO COUNTY HEALTH

# **BEHAVIORAL HEALTH**& RECOVERY SERVICES

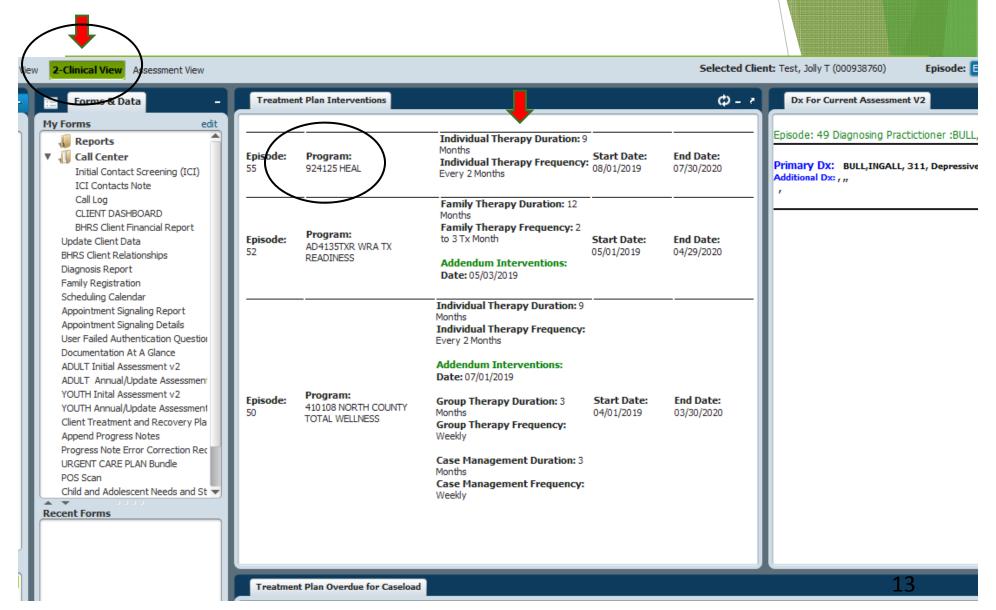
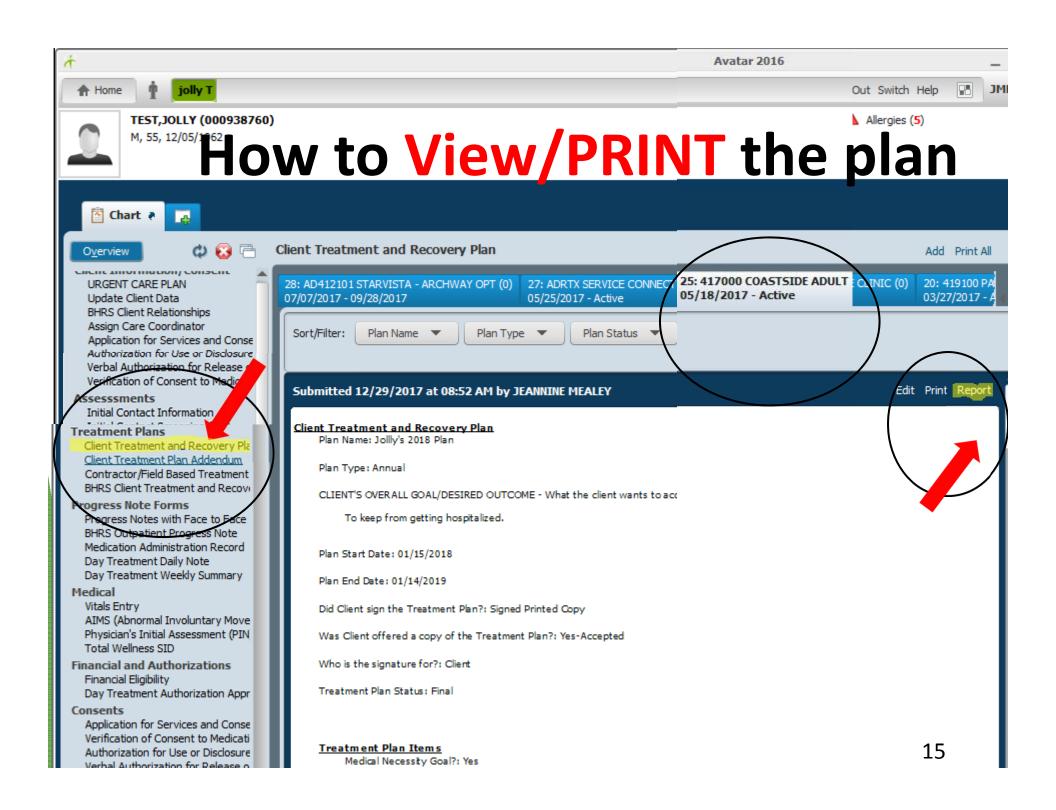




Chart  Client Treatment Plan Addendum				
Addendum to Treatment  Submit	Date of Addendum  Comments	ED TO AN EXISTING PLAN	Addendum to Treatment Plan (Select	2
× ×	Add Interventions  INTERVENTIONS-Describe in detail  Medication Support Family Therapy	the interventions proposed for each ser Rehab/Rehab Group Case Management	vice type Individual Therapy Collateral	Group Therapy
	Medication Support Duration  12 Months 9 Months  Medication Support Frequency 2 to 3 Tx Month 3 to 5 Tx Week Daily Every 3 Months Weekly	6 Months 3 Months  2 Tx Week 3 Tx Week Every 2 Months Monthly	Rehab Group Duration  12 Months 9 Months  Rehab Group Frequency  2 to 3 Tx Month  3 to 5 Tx Week  Daily  Every 3 Months  Weekly	2 Tx Week 3 Tx Week Every 2 Months Monthly
	Medication Support Agency/Provider  Medication Support Inventention Deta	_	Rehab Agency/Provider  Rehab Intervention Details	14





# Billing Under Other Programs

# What you need to know when billing under other programs' episodes

Even if you are writing your Progress Notes under another program, all of these rules still apply:

- Look at the Treatment Plan
- Get a Goal or Intervention added
- ▶ Do an Addendum to their plan and add an Intervention (i.e., your service).



# These are Unplanned Services

You may provide these <u>Unplanned Services prior to completion of</u>
the Assessment/Treatment plan:

- Assessment (5)
- Plan Development (6)
- Crisis Intervention (2)
- ► Medication Support Services for Assessment/Evaluation/Plan Development (14) or urgent need (14) or NEW CODE Medication Support Urgent RN (15U)
- ► NEW CODE: Case Management (52) For Assessment Plan development, limited referral/linkage.



# **These are Planned Services**

These services must be on the **Treatment Plan** in order to bill for them in a Progress Note:

- Collateral (12)/ Group Collateral (120)
- Rehab (7)/ Group Rehab (70)/Intensive Home Based Services (IHBS)
- Therapy (9)/Family (41)/Group (10)
- ► Case Management (see Exception) (51) VRS-51/ICC-51
- ► Therapeutic Behavioral Services (TBS)
- Day treatment intensive
- Adult residential treatment services
- Crisis residential treatment services
- ▶ Medication Support (non-emergency) 15, 16(?)17, 19(?)



You are Responsible for Reviewing the Treatment Plan

# **Steps to Success:**

# A Billable Diagnosis & Good Enough Treatment Plan:

- ► Billable Goals that address Medical Necessity
- ▶ Includes all interventions/service types that are provided
- ➤ Your service type is missing? Ask the clinician to add the service type to the plan
- ► All billed Planned Services MUST address/link to the diagnosis on the Treatment Plan (and medical necessity goal).



# Progress Note Content EVERY NOTE

- **▶** Billed services address Medical Necessity
- ➤ You MUST explain how the services you provided to the client (or others for the sake of the client):
  - ▶ Reduced impairment
  - Restored functioning
  - Prevented significant deterioration in an important area of life functioning
  - ► Improve the mental health condition (age under 21)



Non-group Co-Providers

Non-Group co-providers are **not** billed in the same Progress Note

Each provider must write <u>their own</u>
Progress Note for a Non-Group service.



There is a meeting to address the client's increased symptoms of depression.

# These people attend:

- Client
- Client's mother- worried about son
- ▶ BHRS MD would like to increase medication dose
- ▶ BHRS Clinician recommends family therapy to work on communication
- BHRS Family Partner supports mother is voicing her concerns about her son and his suicidal gestures
- Caminar Case Manager- being added to the team to provide services in the home to improve structure, develop skill building & reporting to team about clients progress

How many progress notes should be written? What are the correct service codes?



There is a meeting to address the client's increased symptoms of depression.



# These people attend:







Client's mother- worried about son



▶ BHRS MD - would like to increase medication dose (1 note, code 15)



 BHRS Clinician – recommends family therapy to work on communication (1 note, code 51)



BHRS Family Partner – supports mother is voicing her concerns about her son and his suicidal gestures (1 note, code 12)



Caminar Case Manager- being added to the team to provide services in the home to improve structure, develop skill building & reporting to team about clients progress (1 note, code 51)



There is a meeting to address the client's increased symptoms of depression.



Client

▶ BHRS MD - would like to increase medication dose

BHRS Peer Worker – drove the client to the meeting,
 waited for the client outside

BHRS Case Manager- reporting on the clients symptoms and recent 5150

How many progress notes should be written? What are the correct service codes?



There is a meeting to address the client's increased symptoms of depression.

# These people attend:

Client



3 notes

BHRS Peer Worker – drove the client to the meeting, waited for the client outside (1 note, code 55)

 BHRS Case Manager- reporting on the clients symptoms and recent 5150 (1 note, code 51)

# **Group Progress Notes**

# YES

- Justify why two providers were needed
- Must be based on the <u>client's needs</u>, <u>not</u> the clinicians' needs

#### **Examples:**

- Due to the unsafe behavior of several clients in the group today, two providers were required to maintain safety
- ▶ Both practitioners were needed, due to potential dysregulation of clients in the group, to remove or re-direct specific clients within the group to maintain safety of all clients in the group.
- ▶ Due to EBP requirements, two providers where needed to provide DBT group.

# NO

- Don't assume that groups need multiple providers
- Many groups may only need 1 provider
- If an intern is there to learn how to run a group- do **NOT** bill for the intern

Non-Billable Groups (code 55)

- ► A "Dual-Diagnosis Group" that focuses ONLY on clients' substance use recovery issues.
- A group that is an <u>unstructured activity</u> such as eating lunch, watching a movie, or going for a walk.





#1 Way to Increase Productivity

# Write a Progress Note!





1# Reason for LOW Productivity

# NOT writing Progress Notes!





When in doubt code 55

#### BHRS Mental Health SOC Documentation Updates Jan 2018

The assessment and treatment plan MUST be completed before <u>planned</u> <u>services</u> are provided.

#### You MAY NOT provide Planned Services Prior to the completion of the assessment/treatment Plan. Planned services include:

- Collateral (12) Group Collateral (120)
- Rehab (7) Group Rehab (70)
- Intensive Home Based Services (IHBS)
- Therapy (9) Family (41) Group (10)
- Case Management (51) VRS-51,ICC-51
- Medication Support 15, 16, 17, 19
- Therapeutic Behavioral Services (TBS)
- · Adult residential treatment service
- Crisis residential treatment services

# You MAY provide these <u>Unplanned Services prior to the</u> completion of the assessment/treatment plan.

- Assessment (5)/TBS Assessment
- Plan Development (6)
- Crisis Intervention (2)
- Medication Support for Assessment/Evaluation/Plan Development (14) or urgent need (14)
- Medication Support Urgent RN (15U)
- Case Management/Plan Dev/Assess/Linkage(52)



Step 1 -Assessment within the first 3 Face to Face Sessions, if possible.
Step 2 -Develop treatment plan with client.
Step 3 -Provide planned services.

# All <u>Planned Service types</u> must be on the treatment plan, including:

Medication Support,

Rehab/Rehab Group

Individual Therapy

Group therapy

Family Therapy

Case Management

TBS

Collateral (Family Partners)

# For each service type include:

- Duration (usually 12 months)
- Frequency, weekly, monthly, daily, 2tx weekly, etc.- DO NOT use "AS NEEDED" or "PRN"
- Describe how the intervention will address the diagnosis, e.g.,

(Med Sup) Address psychotic symptoms to stabilize the client in the community, reduce need for hospitalization. Continue to manage depression with mood stabilizer.

- (9) Short-term CBT to develop a safety plan and coping strategies to deal with depression and paranoia.
- (10) CBT group treatment to improve daily functioning and address ongoing symptom management of depression.
- (51) Assist client with linkage and coordination of services to assist the client in maintaining living in the community and not needing a higher level of care.
- (12) Assist parent in understanding the need to structured home like to reduce child's acting out.

Every plan much have a medical necessity goal that addressed the diagnosis.

Group progress notes MUST justifying co-providers in every progress note, examples:

- Due to the unsafe behavior of several clients (i.e....) two providers were required to maintain safety
- Both practitioners were needed due to potential dysregulation of clients in the group to remove or re-direct specific clients within group to maintain all clients in the group.
- Due to EBP requirements two providers where needed to provide DBT group.
- Co-provider assisted in role playing healthy communication skills throughout group.
   Visit us on the web: www.smchealth.org/bhrs/om

#### BILLING CODE REFERENCES & DESCRIPTIONS

#### \$ TARGETED CASE MANAGE-MENT (51) VRS-51, Katie A-ICC-51

- Communicate with others to assess, refer, monitor, evaluate services
- Coordinate w/others to access service
- Locate funding for living arrangement
- Referral/Access/ or Monitor needed services e.g.., Medical Needs, MH Services, Social Support, Vocational
- Provide linkage to other services

#### \$\$\$ CRISIS INTERVENTION (2)

- Assess immediate crisis
- Danger to Self/Other addressed/resolved
- Gravely Disabled addressed/resolved
- ► Stabilize immediate crisis

#### **Mental Health Services**

#### \$\$ ASSESSMENT(5), GROUP(50)

Non MD/Non NP- Working on Assessment

- ► Assessment/Medical Necessity
- ► Assessment/Diagnosis/MSE (by LPHA)
- ▶Re-Assessment
- ▶Assessment Addendum

- Behavioral or Needs Assessment
- CA/LOCUS
- Co-Occurring Assessment
- Conduct Psych Test (by PhD/PsyD)
- Review external information for assessment

#### \$\$ PLAN DEVELOPMENT (6)

Non MD/Non NP - Working on Treatment Plan

- Develop client's Treatment Plan
- Gain Treatment Plan approval
- Evaluate Treatment Plan goal, progress
- Update/Modify client's Treatment Plan
- ▶ Treatment Plan Addendum

#### \$\$ REHAB (7), VRS-07, Katie-A-IHBS-7, REHAB GROUP (70)

- Address Behavioral Health goal
- Address Behavioral symptoms
   impact of/on health
- Coping skills development
- Daily living skills development
- Social skills development

#### \$\$ COLLATERAL (12), GROUP (120)

- Not for working with other professionals
- Address client's MH w/support person/family
- MH Related-Parent/support person training
- MH Related- Psycho-educate support person

#### BILLING CODE REFERENCES & DESCRIPTIONS

#### \$\$ THERAPY INDIVIDUAL (9), FAMILY (41) & GROUP (10)

LPHA, Trainee, RN w/Psych MS

 Address Treatment Plan goals therapy

#### \$\$\$\$ MEDICATION SUP (15), GROUP (150)

MD, NP, RN, LVN or LPT

- Address health issues impacted by psychotropic meds or functional impairments
- Address psychiatric symptoms
- Evaluate med side effects/effect
- Medication education
- Obtain Med Consent
- Physician Update Assessment
- Develop Treatment Plan with medication support

#### \$\$\$\$ MD/NP INITIAL ASSESSMENT (14)

Physician Initial Assessment

#### \$\$\$\$ RN INJECTIONS (16)

MD, NP, RN, LVN or LPT

Injection

#### \$\$\$\$ RN INJECTIONS (19)

MD, NP, RN, LVN or LPT

 Injection of Risperdal Consta or Invega Sustenna

#### \$\$\$\$ MD TIME NOT MEDI-CARE BILLABLE (17)

Not face to face MD or NP

- Billable to Medi-Cal without client present— Not any of the things listed under (55)
- Chart review for medication
- Reports/letters- not SSI, not court
- Clinical Paperwork

## **Unbillable Services (55)**

- Clerical task
- Close a chart
- ⊗ CPS/APS report
- Deceased client
- Discharge Note
- Second Family Member Referral
- Preparation for service
- Rep-Payee functions
- Review/Prepare chart for release of information
- SSI paperwork no client present

- Tarasoff Report—making report
- Translation only
- Transportation of client driving to appointment
- Prepare, Testify, Wait in court
- Write a letter for court
- No service missed visit no show
- ⊗ Schedule appointments
- Send or receive email, voicemail, fax



# Resources

- ► Updated Documentation Manual: <a href="http://www.smchealth.org/sites/main/files/file-attachments/bhrsdocmanual.pdf">http://www.smchealth.org/sites/main/files/file-attachments/bhrsdocmanual.pdf</a>
- ► Updated treatment plans can be found at: <a href="http://www.smchealth.org/post/bhrs-client-treatment-recovery-plan">http://www.smchealth.org/post/bhrs-client-treatment-recovery-plan</a>
- ► For San Mateo County Contractors:

  <a href="http://www.smchealth.org/bhrs/providers/soc">http://www.smchealth.org/bhrs/providers/soc</a> and for Out-Of-County Youth Contractors

  <a href="http://www.smchealth.org/bhrs/providers/oocy">http://www.smchealth.org/bhrs/providers/oocy</a>
- Policy Memo:

http://www.smchealth.org/bhrs-policies/policy-memo-policy-memo-11-17-chart-documentation-requirement-updates



