

SMC BHRS Documentation Manual (for SMHS)

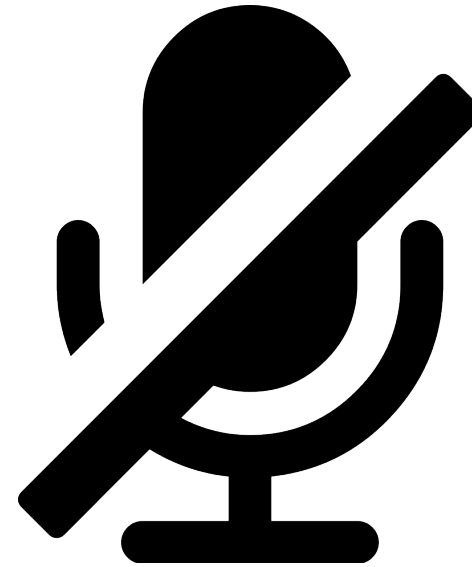


SAN MATEO COUNTY HEALTH
**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

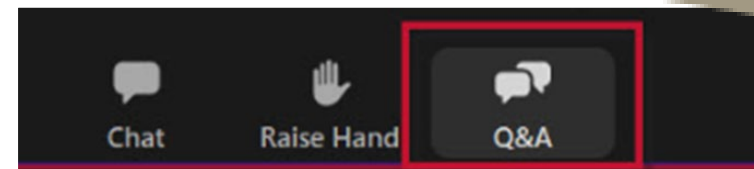
June 2024

Housekeeping

- Reminder- Please keep your mic muted
- Type your questions into the chat –Q&A will be at the end of the webinar
- Today's session will be recorded



[This Photo](#) by Unknown Author is licensed under [CC BY-NC](#)



SAN MATEO COUNTY HEALTH
**BEHAVIORAL HEALTH
& RECOVERY SERVICES**



SAN MATEO COUNTY HEALTH

BEHAVIORAL HEALTH & RECOVERY SERVICES

AGENDA

- New Sections of the Documentation Manual
- Review format of the new Documentation Manual
- Demo of the new Documentation Manual

We will *not* be covering specific content in the manual. More information will be provided in the section specific trainings that will be offered throughout the rest of the year.

What's New?

DHCS' efforts to both streamline and standardize documentation standards have added several new processes to the behavioral health system.

The new Documentation Manual includes information on these new processes under CalAIM, including new ways to:

- ✓ Conceptualize Medical Necessity
- ✓ Screen individuals for SMHS
- ✓ Communicate transitions with MCPs
- ✓ Document focuses of treatment



What's New?

New Sections have been added to the Documentation Manual to support staff in understanding these CalAIM changes.

Criteria to Access SMHS, Medical Necessity

Screening Tools

Additional Assessment Tools

Problem List

Transition of Care Tool



NAVIGATING THE MANUAL




SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Navigating the Manual

Due to these additions, the Documentation Manual is much longer than previous documentation manuals.

Therefore, we have created several **new features** to help staff navigate the manual.

 BHRS Documentation Manual for Specialty Mental Health Services		Date Updated
BHRS Documentation Manual for SMHS		
Table of Contents		
Introduction	Introduction	4
Compliance	Behavioral Health System of Care	4
Documentation Requirements	Compliance	8
Access to SMHS and Medical Necessity	General Information About Compliance	9
Screening Tools	Fraud, Waste, and Abuse (FWA)	10
Assessment	Alerts, Incident Reports, Breaches	11
Additional Assessment Tools	Documentation Requirements	13
Diagnosis	Overview	13
Problem List	Access to SMHS and Medical Necessity	3
Care Planning	Overview	3
Coordination of Care	Criteria to Access Specialty Mental Health Services (SMHS)	4
Discharges and Transfers	Medical Necessity Criteria	8
Coding Services	Screening Tools	10
Progress Notes	CalAIM Adult and Youth Screening Tools for SMHS	10
Appendices	ICC Eligibility	13
A – Service Code, Location Code, Time Field Matrix	Assessment	15
B – Service Definitions	Scope of Practice	15
	Assessment Domains	16
	Additional Assessment Components	20
	Assessment Types	22
	Assessment Timelines	24
	Multiple Teams or Providers for A Single Beneficiary	25
	Additional Required Assessment Tools	26
	CANS and PSC-35	26
	Diagnosis	28



Navigating the Manual

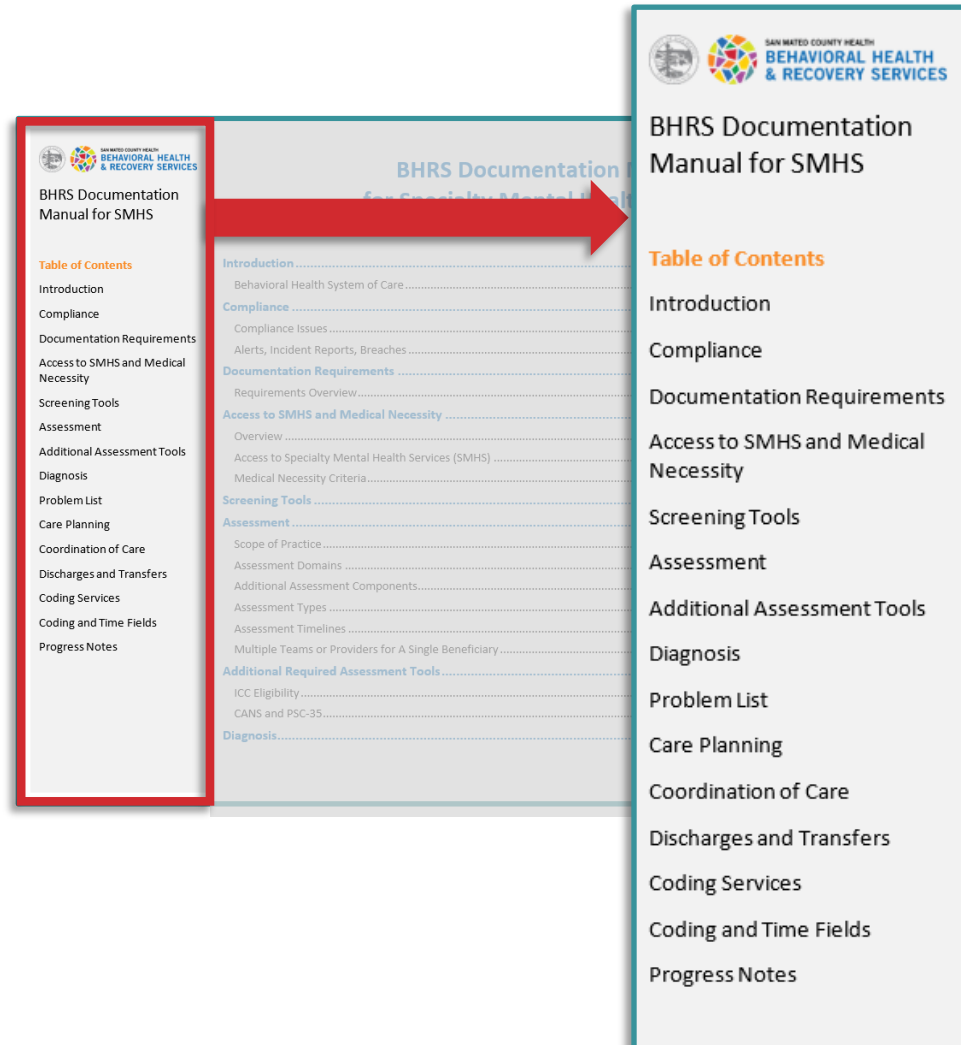
A Table of Contents has been added to show each section and the main categories within each section.

Assessment	9
Scope of Practice	9
Assessment Domains	10
Additional Assessment Components.....	14
Assessment Types	16
Assessment Timelines	18
Multiple Teams or Providers for A Single Beneficiary	21

BHRS Documentation Manual for Specialty Mental Health Services		Date Updated
Introduction	4	
Behavioral Health System of Care.....	4	
Compliance.....	8	
General Information About Compliance.....	9	
Fraud, Waste, and Abuse (FWA)	10	
Alerts, Incident Reports, Breaches.....	11	
Documentation Requirements.....	13	
Overview	13	
Access to SMHS and Medical Necessity	3	
Overview	3	
Criteria to Access Specialty Mental Health Services (SMHS)	4	
Medical Necessity Criteria.....	8	
Screening Tools	10	
CalAIM Adult and Youth Screening Tools for SMHS.....	10	
Assessment	15	
Scope of Practice	15	
Assessment Domains	16	
Additional Assessment Components	20	
Assessment Types	22	
Assessment Timelines	24	
Multiple Teams or Providers for A Single Beneficiary.....	25	
Additional Required Assessment Tools	26	
CANS and PSC-35.....	26	
Diagnosis	28	



Navigating the Manual

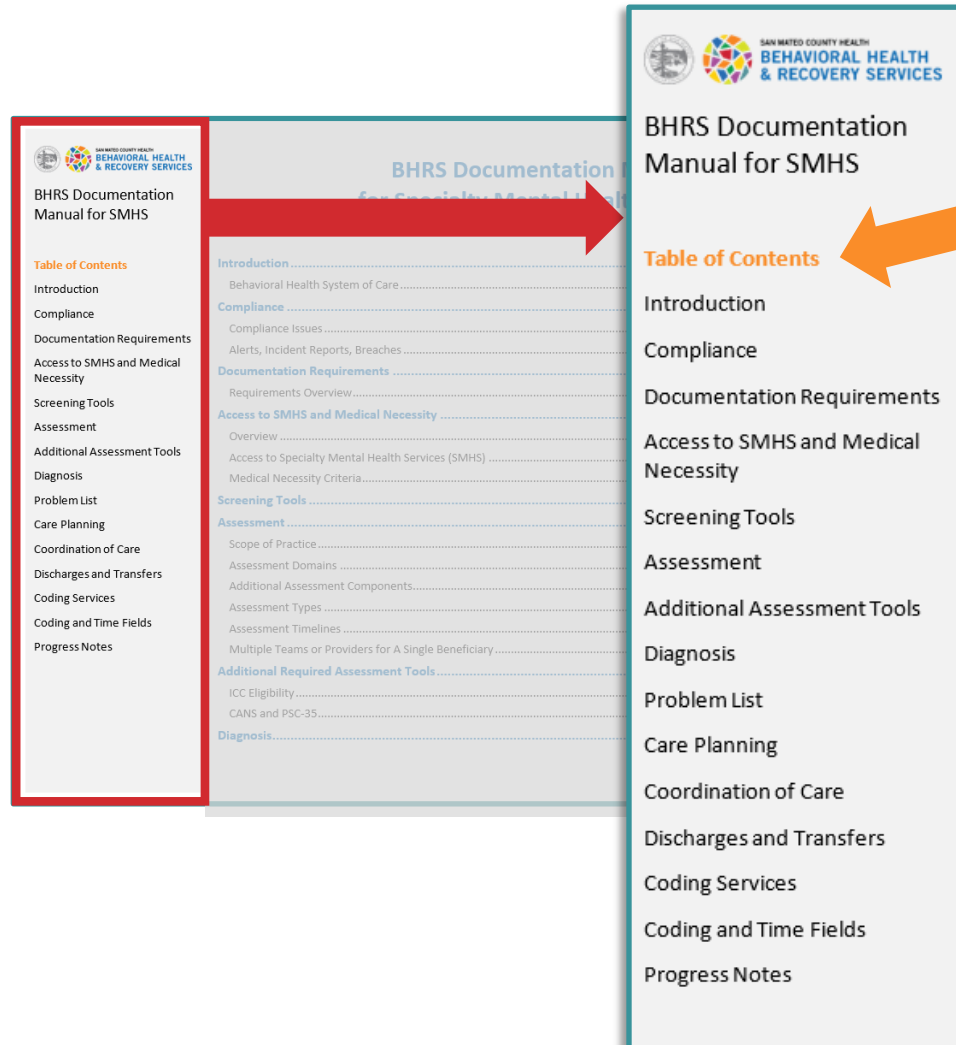


This menu bar has been added to left side of every page of the manual to allow staff to:

- ☐ See where they are in the manual
- ☐ Easily navigate to another section of the manual



Navigating the Manual



BHRS Documentation Manual for SMHS

Table of Contents

- Introduction
- Compliance
- Documentation Requirements
- Access to SMHS and Medical Necessity
- Screening Tools
- Assessment
- Additional Assessment Tools
- Diagnosis
- Problem List
- Care Planning
- Coordination of Care
- Discharges and Transfers
- Coding Services
- Coding and Time Fields
- Progress Notes

BHRS Documentation Manual for SMHS

Table of Contents

- Introduction Behavioral Health System of Care
- Compliance Compliance Issues Alerts, Incident Reports, Breaches
- Documentation Requirements Requirements Overview
- Access to SMHS and Medical Necessity Overview Access to Specialty Mental Health Services (SMHS) Medical Necessity Criteria
- Screening Tools
- Assessment Scope of Practice Assessment Domains Additional Assessment Components Assessment Types Assessment Timelines Multiple Teams or Providers for A Single Beneficiary
- Additional Required Assessment Tools ICC Eligibility CANS and PSC-35
- Diagnosis

The current section you are in will be highlighted in **orange** in the menu bar.

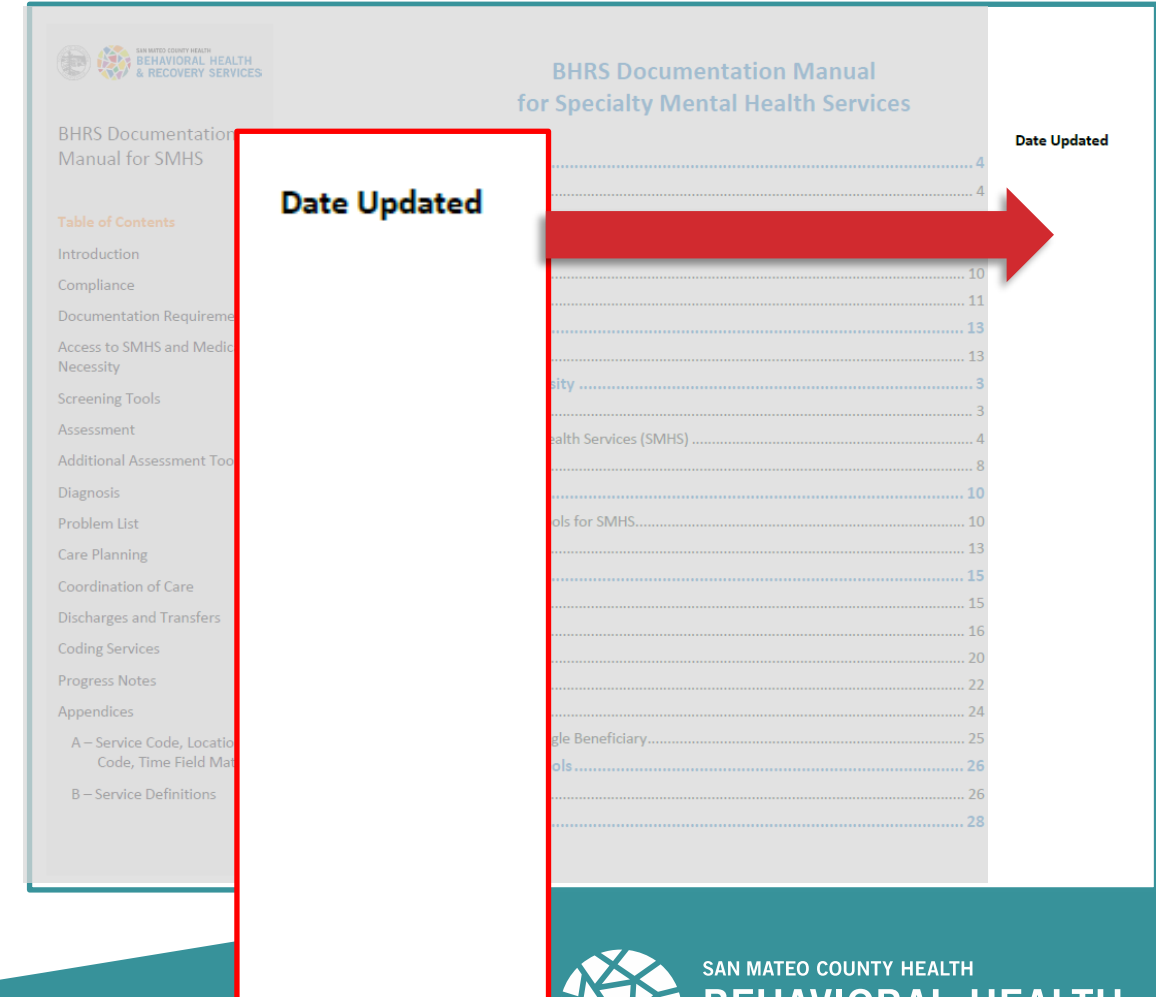
Each section is also linked to the appropriate section in the manual.

This means that if you access the manual on a computer, you can click on the section name to navigate to that section.



Navigating the Manual

There is a column to the left of the table of contents called “**Date Updated**” that will note if and when a particular section or subsection was updated since the original publication of the documentation manual.

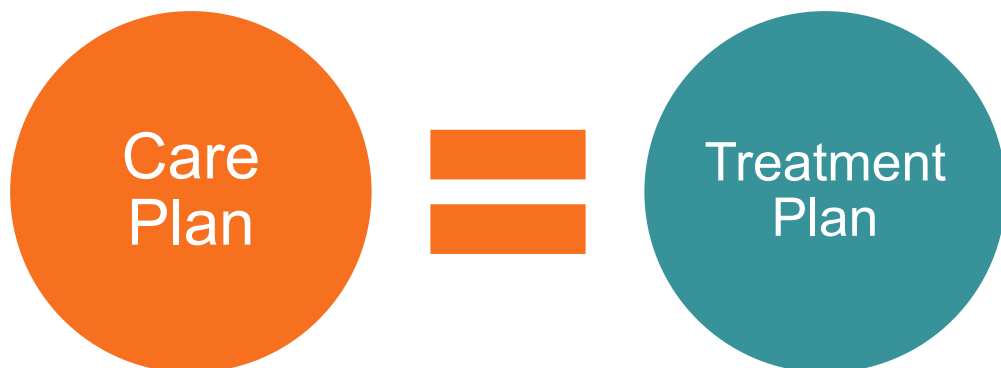


BHRS Documentation Manual for Specialty Mental Health Services		Date Updated
BHRS Documentation Manual for SMHS	4	
Table of Contents	4	
Introduction	10	
Compliance	11	
Documentation Requirements	13	
Access to SMHS and Medical Necessity	13	
Screening Tools	3	
Assessment	3	
Additional Assessment Tools	4	
Diagnosis	8	
Problem List	10	
Care Planning	10	
Coordination of Care	13	
Discharges and Transfers	15	
Coding Services	15	
Progress Notes	16	
Appendices	20	
A – Service Code, Location Code, Time Field Map	22	
B – Service Definitions	24	
Single Beneficiary	25	
Tools for SMHS	26	
	26	
	28	



Navigating the Manual

“Care Planning” and **“Care Plans”** are the terms we will use moving forward for what we used to call “Treatment Planning” and “Treatment Plans”



SAN MATEO COUNTY HEALTH BEHAVIORAL HEALTH & RECOVERY SERVICES		Date Updated
BHRS Documentation Manual for SMHS	Diagnosis Scope of Practice.....	29
	Diagnosis and Billing.....	30
	Other Diagnosis-Related Issues.....	31
Table of Contents	Problem List	33
Introduction	Care Plans.....	34
Compliance	Pre-CalAIM Care Plans (Treatment Plans).....	34
Documentation Requirements	CalAIM Care Plans	41
	Coordination of Care	42
	Co-Occurring Substance Use Disorders.....	43
	Proficiencies Shared Between BHRS and an MCP.....	45
	Care Plans.....	47
	Pre-CalAIM Care Plans (Treatment Plans).....	48
	CalAIM Care Plans	49
	Progress Notes	50
	General Information.....	51
	Progress Note Fields.....	51
	Same Day, Same Service Progress Notes	52
	Individual Progress Notes.....	54
	Group Progress Notes	2
	Additional Requirement for Remote Service Notes.....	2
	Documenting Timely Access to Services	4
	Tips for Writing Progress Notes	8
	Sample Progress Notes	9
		10
		12
		13
		14
		16



Navigating the Manual

Compliance Alerts

Information here.

Documentation

Tips will be listed here

OTHER USEFUL INFO

Information here.



RELATED POLICIES TO REVIEW

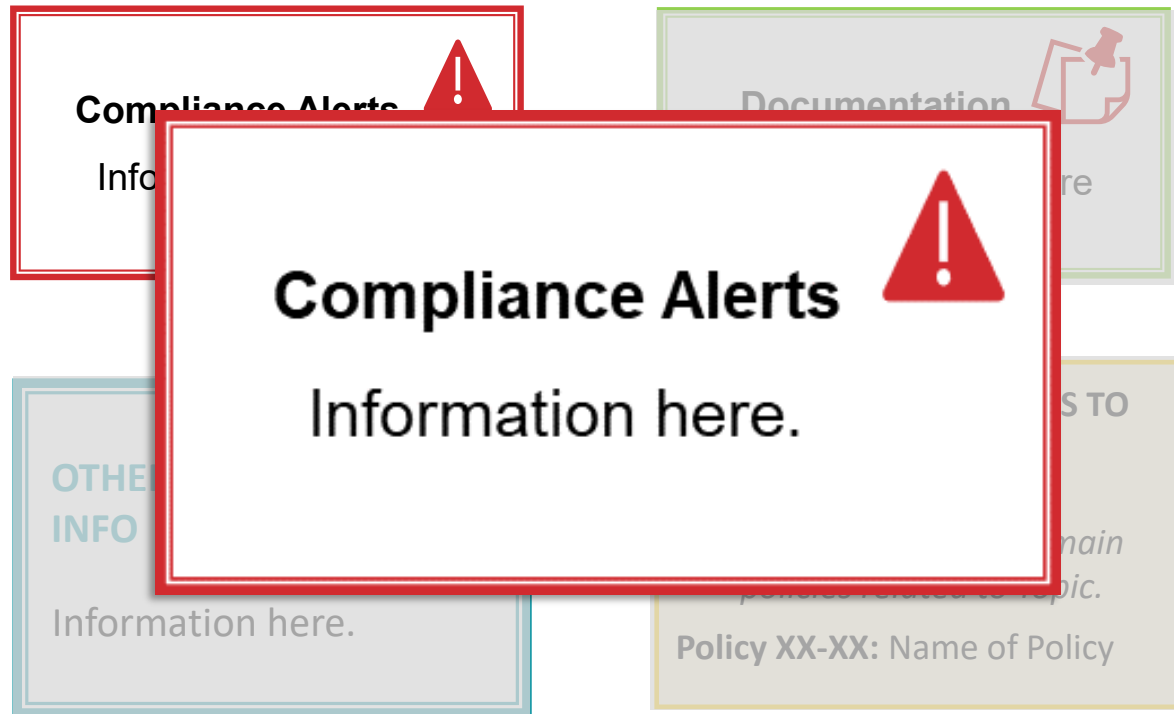
*The following are the main
policies related to Topic.*

Policy XX-XX: Name of Policy

These text boxes have been added throughout the manual to highlight key concepts or helpful information for staff.



Navigating the Manual

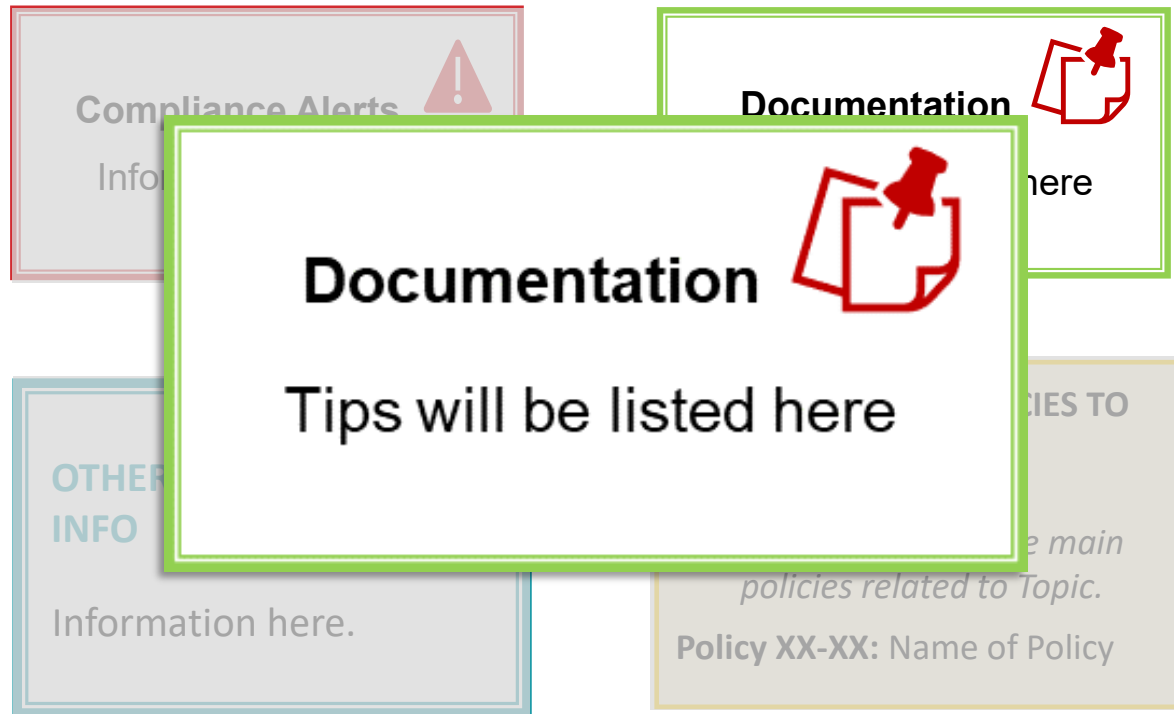


COMPLIANCE ALERTS

This manual is comprised mostly of documentation requirements that are necessary for compliance to state and federal regulations. Red boxes call out specific elements of the process that many staff forget or might not have been aware of.



Navigating the Manual



DOCUMENTATION REMINDERS/TIPS

These boxes are used to provide reminders and tips on how to document certain services.



Navigating the Manual



OTHER USEFUL INFORMATION

This box provides definitions of terminology or other information that is general to behavioral health or how the system functions.



Navigating the Manual



POLICIES TO REVIEW

Policies related to the topic are noted in a yellow box. The policies that are listed are the main policies associated with the topic, but do not necessarily include ALL policies related to the topic.

Please contact your program supervisor directly or contact QM's Ask inbox at hs_bhers_ask_qm@smcgov.org if you have questions about what additional policies might be applicable to your program.



Navigating the Manual



Note Regarding Policies

BHRS is actively working on updating policies to meet the new regulatory requirements and processes.

QM will notify staff as soon as any new policy updates are finalized.



Navigating the Manual

Because some requirements are still yet to be implemented, **certain sections of the documentation manual are marked as “under construction.”**

Each section will be released when the corresponding training is provided.



[This Photo](#) by Unknown
Author is licensed under [CC BY-NC](#)



SAN MATEO COUNTY HEALTH
**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

CONCEPTUALIZING DOCUMENTATION REQUIREMENTS



SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

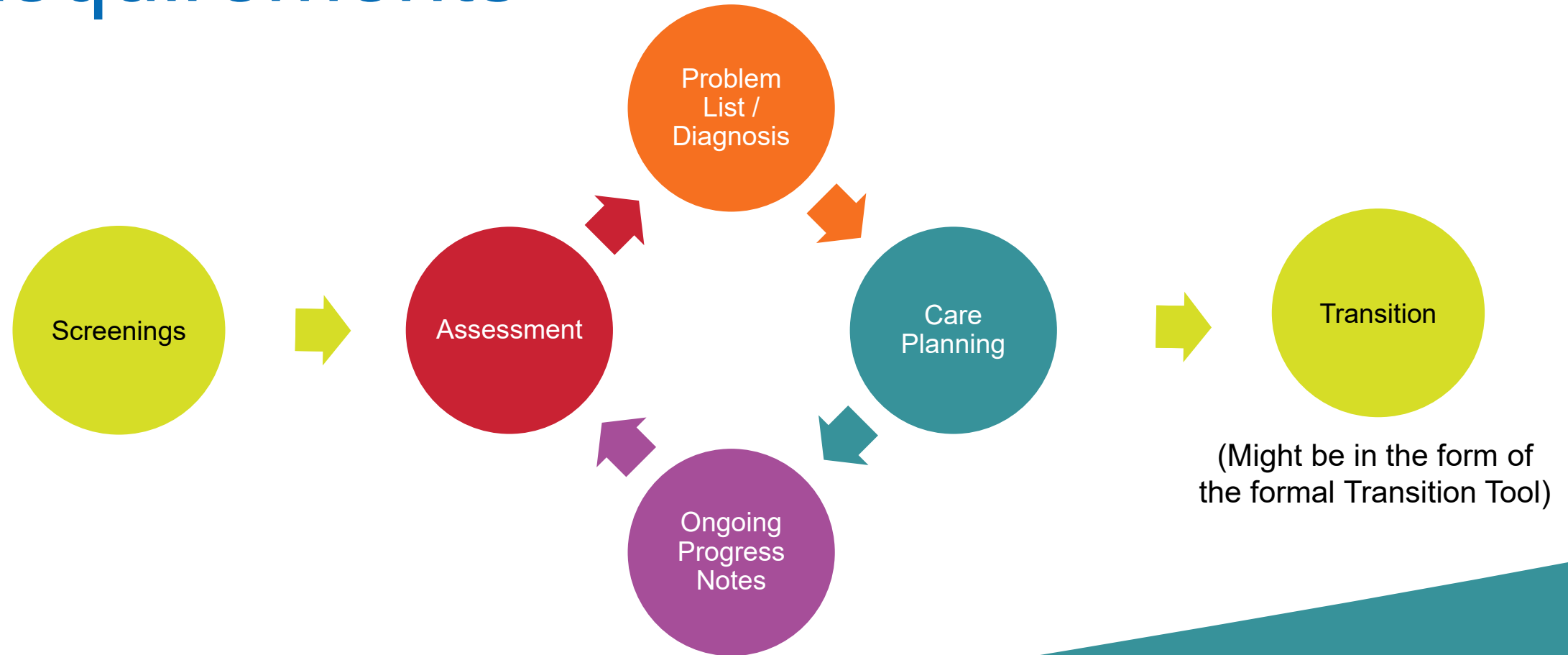
Conceptualizing Documentation Requirements

The foundational pieces to documentation **should all inform each other and paint a clear picture of the beneficiary's** medical necessity and appropriate treatment.

- ✓ Screening Tools (if applicable)
- ✓ Assessments (including Diagnosis and Mental Status Exam)
- ✓ CANS (beneficiaries ages 6 through 20 years old)
- ✓ PSC-35 (beneficiaries ages 3 through 18 years old)
- ✓ ICC Eligibility Screening (beneficiaries under 21 years of age)
- ✓ Trauma Screening Tool (To Be Determined...)
- ✓ Problem List
- ✓ Care Planning Requirements (for select services and programs)
- ✓ Transition of Care Tool (if applicable)
- ✓ Progress Notes



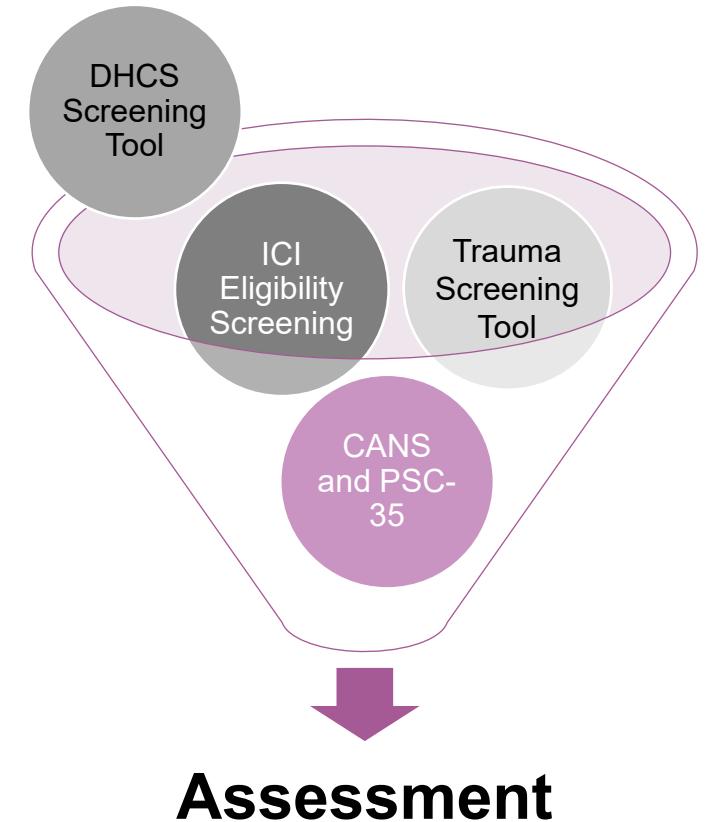
Conceptualizing Documentation Requirements



Conceptualizing Documentation Requirements

Note:

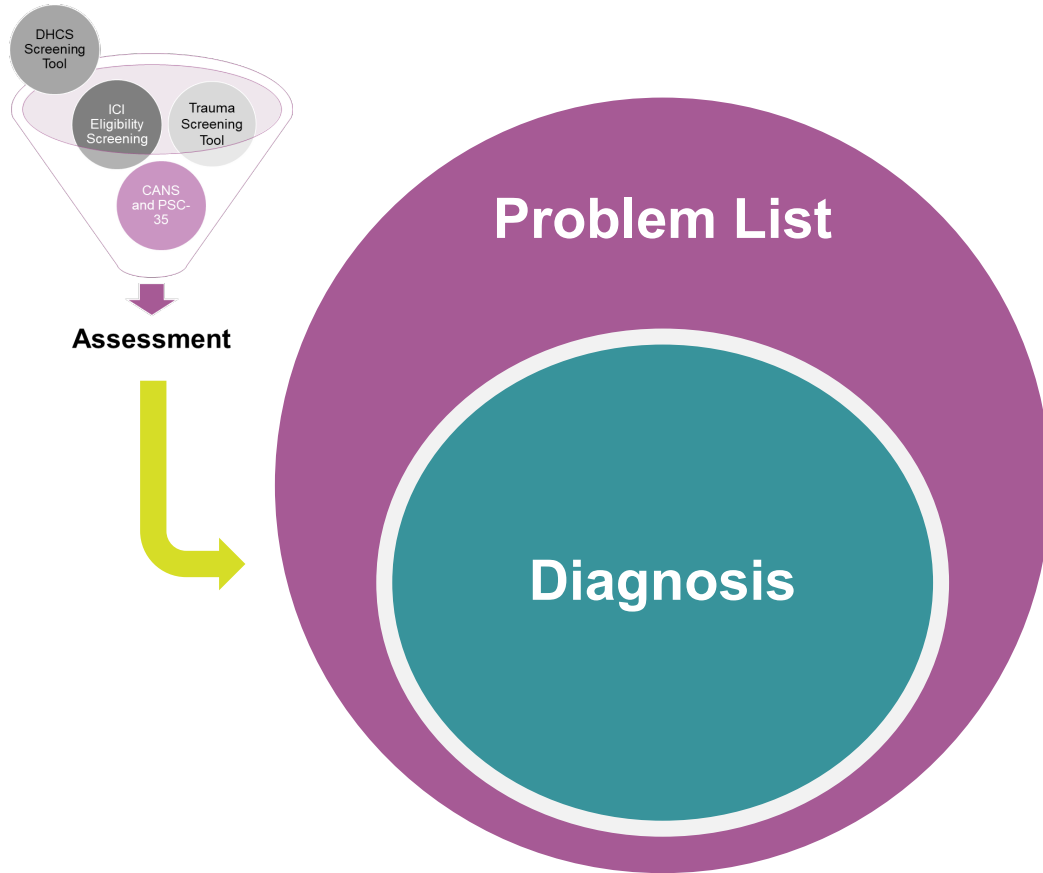
- ☐ DHCS has not yet identified a trauma screening tool for Counties to use to support determination of Access Criteria.
- ☐ ICI Eligibility Screening has not been implemented yet, but will be implemented soon!
- ☐ Training will be provided in the next few weeks for those programs that will be administering the DHCS Adult and Youth Screening Tools.



SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Conceptualizing Documentation Requirements

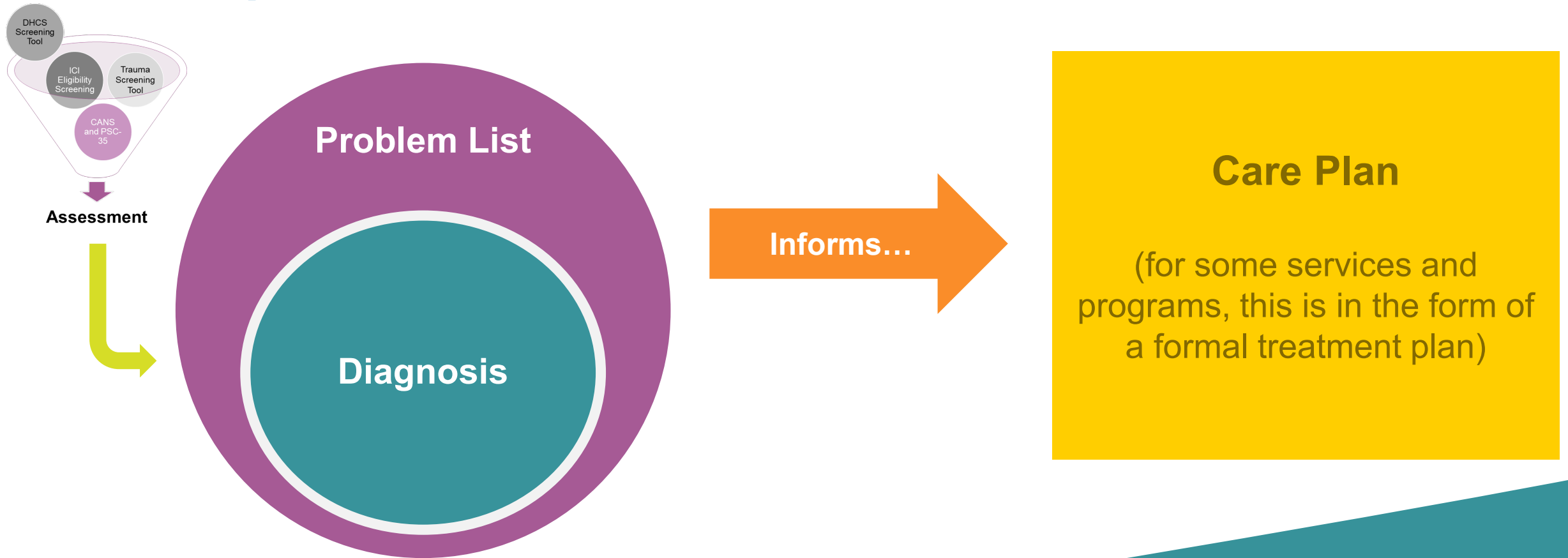


While a mental health diagnosis would be included in the problem list, the problem list itself is a broader list that also includes additional conditions and risk factors that may be self-reported by the beneficiary or identified by other health care providers.

The “**Problem List**” will be required for all clients, regardless of program and services.



Conceptualizing Documentation Requirements



Updates to the QM Website



SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Updates to Website

- Updates will be made to our QM Website to improve your experience finding resources.
- Previously, we separated our CalAIM Webinars and FAQs into a dedicated CalAIM tab. Since we are beginning the process of full implementation, the following will change:
 - We will still retain the CalAIM Tab for background information regarding CalAIM, including links to our CalAIM Policies.
 - Items like FAQs and Webinar PPTs will be moved to the respective tabs that already exist on the QM website.



Let's Take a Look at the Doc Manual!



SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Special Note about Coding Section



SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Service Code Cheat Sheet

Special Note about the Service Code Cheat Sheet

- The Service Code Cheat Sheet will be located in a separate file outside of the Documentation Manual. A link to the Service Code Cheat Sheet is included in the Manual.
- Over the next few years, the Service Code Cheat Sheet will be updated on a more frequent basis than the Documentation Manual.



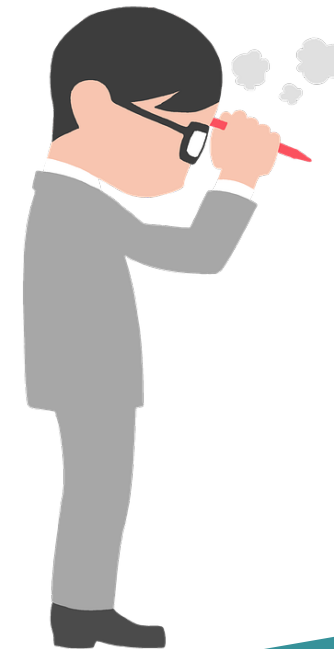
Service Code Cheat Sheet

Special Note about the Service Code Cheat Sheet

- DHCS is planning to continuously update the Medi-Cal billing manual and coding guidance in order to:
 - Ensure Medi-Cal's use of CPT codes is aligned to CMS specifications.
 - Ensure billing meets County needs.



[This Photo](#) by
Unknown Author is
licensed under [CC
BY-NC](#)



SAN MATEO COUNTY HEALTH
**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Coding Update!



Service Code Updates from DHCS

- Minute ranges for several services have been changed
- G2212 has been discontinued
- For services that have a maximum bracket of time, **you no longer need to use the prolonged service add-on code.** For services in the maximum time range, you should add all minutes in the service time.

Example: Med Support Services

- Code 99212CA for 10-19 min
- Code 99213CA for 20-29 min
- Code 99214CA for 30-39 min
- Code 99215CA for 40+ minutes

If the service lasted 78 minutes, then you would use code 99215CA and input 78 in the Service Time field.

Effective July 1, 2024!



SAN MATEO COUNTY HEALTH
**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Coding Update!

Location Code Index

- There have been changes to some lockout location guidelines with the recently published update to the Medi-Cal Billing Manual. MIS and QM are currently analyzing the changes and will provide the new Location Code Index as soon as it is ready.



Special Note about “Under Construction” Sections



SAN MATEO COUNTY HEALTH

**BEHAVIORAL HEALTH
& RECOVERY SERVICES**

Unimplemented Processes/Forms

FAST



SLOW



[This Photo](#) by Unknown Author is licensed under [CC BY-NC](#)

Some information regarding upcoming Tools/Processes is included in this manual to help staff understand changes that are coming soon.

Until certain forms (like the Transition of Care Tool) are fully implemented, **staff should continue to use current (Pre-CalAIM) processes.**



Assessment

Staff and contract agencies may continue to use the current Assessments (a.k.a. “V2” assessments) until the new CalAIM Assessment is implemented in the Fall of 2024.

However, staff should use the information regarding the required elements of the CalAIM Assessment (a.k.a. the 7 Domains) as a guide to help them ensure that all the required information is included somewhere in the assessment.



Implementation Timeline



Implementation Timeline



2024 BHRS CalAIM Training Schedule

CalAIM Trainings

ET 39
**SAVE!
THE DATE!**

Join QM every 3rd Thursday of the month from
10:30am - 12pm at the [Zoom link here!](#)

Training is mandatory for all contractors and
BHRS. Please mark your calendars!

All trainings
will include
live Q&A!

JUN 20

Documentation Manual Training
(MH only)

JUL 18

Access/Medical Necessity Training
(MH only)

AUG 15

Service Codes Training*
(MH only)

SEP 19

Progress Notes Training*
(MH & SUD)

OCT 17

Assessment Training
(MH only)

NOV 21

Care Planning/Problem List Training
(MH & SUD)

COMING SOON!

Bonus Z-Code Training
(MH only)

* Contractors have completed these trainings but are welcome to attend again.



SAN MATEO COUNTY HEALTH

BEHAVIORAL HEALTH & RECOVERY SERVICES

Questions?



SAN MATEO COUNTY HEALTH

BEHAVIORAL HEALTH & RECOVERY SERVICES



www.smchealth.org/qm



HS_BHRS_ASK_QM@smcgov.org