

Monterey County Behavioral Health, Quality Improvement

RE:	Establishing and Modifying Mental Health Programs in the Electronic Medical Records System
FORM REFERENCE	Behavioral Health Provider Form
EFFECTIVE	October 15, 2021

October 5, 2021

All Monterey County Behavioral Health and Medi-Cal contracted provider programs must have an established episode in the electronic health record (EHR) system. This episode must be updated when new funding is received or a need for new tracking for an existing program is identified. Existing programs must be modified in the EHR when contracted services, reporting, or billing requirements for an existing program have changed.

Communicating all clinical and reporting requirements are the responsibility of the Behavioral Health Services Manager (BHSM) and must be documented in the Behavioral Health Provider Data Form. The EHR is used for claiming services, therefore the Behavioral Health Provider Data Form must be submitted prior to the receipt of invoices and ideally before services are provided. All actions regarding to this policy must be performed within 72 business hours of receipt of request from previous party.

PROCEDURE

Creation of New Mental Health Programs

The creation of a new program in the EHR is a multidisciplinary team approach. The following procedure will establish a systematic approach to creating and documenting approval and settings of new programs in the Electronic Health Records (EHR).

1. A Behavioral Health Provider Form is completed by the appropriate Behavioral Health Services Manager (BHSM). For contracted program, the BHSM can collaborate with a contract analyst to verify applicable services and provider information.
2. If the provider site is not Medi-CAL certified through Monterey County, contract analysts will gather the relevant supporting documentation as follows. If the provider site is already Medi-CAL certified through Monterey County, skip to Step 3.
 - a. Site NPI number
 - b. License
 - c. Medi-CAL certification from county where site is located (out-of-county provider)
 - d. Fire clearance (site located in Monterey county)
3. BHSM will submit the Behavioral Health Provider Data Form, the effective start date of the program, and relevant supporting documentation to 415-billing@co.monterey.ca.us for review and initial approval.
4. Finance Manager or designee will review the relevant data elements and either approve or communicate the appropriate changes to the Behavioral Health Provider Data Form via 415-billing@co.monterey.ca.us
5. Billing Manager or designee will review the relevant data elements and either approve or communicate the appropriate changes to the Behavioral Health Provider Data Form via 415-billing@co.monterey.ca.us
6. Quality Improvement Manager or designee reviews and approves initial Behavioral Health Provider Data Form.
7. Quality Improvement staff will work with the BHSM and contracted provider to facilitate a state certification review if the new program meets all the following criteria. If it does not, skip to step 8.
 - a. New program site does not have a Medi-Cal Certification through Monterey County
 - b. New program site is in Monterey County
 - c. New program is either:
 - i. County owned program/facility
 - ii. Contracted provider residential or medication support program

8. Quality Improvement staff will work with the BHSM and contracted provider to facilitate a site review if the new program meets all the following criteria. If it does not, skip to step 10.
 - a. New program site does not have a Medi-Cal Certification through Monterey County
 - b. New program site is in Monterey County
 - c. Site is owned by a contracted provider
9. QI or state auditor conducts site review
10. Complete Medi-Cal application based on the services outlined in the approved Behavioral Health Provider Data form.
11. Quality Improvement receives Medi-Cal certificate and completes Behavioral Health Provider Data Form with Medi-Cal information
12. Quality Improvement creates program in EHR based on approved Behavioral Health Provider Data Form and the approved Medi-Cal certified codes located within DHCS Provider Information Management System (PIMS).
13. Quality Improvement sends an email notification to Billing Manager and applicable Billing staff that the program is available in the electronic health record for validation and for any integration with billing processes.
14. Quality Improvement staff send e-mail notification when program is finalized in the electronic health record to:
 - Deputy Director (county program)
 - Behavioral Health Services Manager (BHSM)
 - Billing Manager
 - Finance Manager
 - Contract Analyst (contract program)
15. If a contract provider program, Quality Improvement staff will add the program to the system code based on the effective start date and notify the BHSM and contract analyst that it is now available to the contracted provider.
16. The BHSM will notify the provider of the creation of the new program, its uses, and its restrictions.

Modifying Existing Mental Health Programs

Modifying an existing program in the EHR is a multidisciplinary team approach. The following procedure will establish a systematic approach to modifying and documenting approval and settings of new programs in the Electronic Health Records (EHR).

1. The appropriate Behavioral Health Services Manager (BHSM) completes the relevant sections of the Behavioral Health Provider Data Form outlining the changes to the existing program. For contracted program, the BHSM can collaborate with a contract analyst to verify applicable services and provider information.
2. BHSM will submit the Behavioral Health Provider Data Form, the effective start date of the program to 415-billing@co.monterey.ca.us for review and initial approval.
3. Finance Manager or designee will review the relevant data elements and either approve or communicate the appropriate changes to the Behavioral Health Provider Data Form via 415-billing@co.monterey.ca.us
4. Billing Manager or designee will review the relevant data elements and either approve or communicate the appropriate changes to the Behavioral Health Provider Data Form via 415-billing@co.monterey.ca.us
5. Quality Improvement Manager or designee reviews and approves initial Behavioral Health Provider Data Form.
6. Quality Improvement staff will complete a Medi-Cal application based on the changes outlined in the approved Behavioral Health Provider Data form.
7. Quality Improvement receives Medi-Cal certificate and completes Behavioral Health Provider Data Form with Medi-Cal information
8. Quality Improvement modifies program in EHR based on approved Behavioral Health Provider Data Form and the information located within DHCS Provider Information Management System (PIMS).
9. Quality Improvement sends an email notification to Billing Manager and applicable Billing staff that the program changes are available in the electronic health record for validation and for any integration with billing processes.

10. Quality Improvement staff send e-mail notification when program changes are finalized in the electronic health record to:

- Deputy Director (county program)
- Behavioral Health Services Manager (BHSM)
- Billing Manager
- Finance Manager
- Contract Analyst (contract program)

11. The BHSM will notify the contracted provider of the changes to the existing program, its uses, and its restrictions.