

# Organizational Provider Operations Handbook

## TABLE OF CONTENTS

TABLE OF CONTENTS.....	I
LIST OF APPENDICES.....	X
ABBREVIATIONS REFERENCE GUIDE.....	XIV
CUSTOMER SERVICE MISSION.....	XVII

### A. SYSTEMS OF CARE

Mission Of Health And Human Services Agency Mental Health Services .....	A.0
Client Population Served By The Mental Health Plan .....	A.0
Child, Youth & Families (CYF) System Of Care (SOC).....	A.0
Seriously Emotionally Disturbed (SED) Clients .....	A.0
CYF SOC Principles.....	A.1
CYF Goals .....	A.2
Outcome Objectives.....	A.3
Family & Youth Partnerships .....	A.3
Y/FSP as Direct Service Providers .....	A.4
Y/FSP: Selection, Training and Supervision .....	A.4
Operational Guidelines for Youth/Family Support Partners (Y/FSPs) .....	A.5
Duties and Responsibilities of the Y/FSPs .....	A.5
Provision of Services and Claiming .....	A.6
Claiming to other Funding Source .....	A.6
Youth & Family Partner Roles Other than Direct Services .....	A.6
Adult/Older Adult System Of Care .....	A.7
Psychosocial Rehabilitation And Recovery .....	A.8
Services For Dual Diagnosis (Mental Illness and Co-occurring Substance Use Disorders).....	A.9
Services To Older Adults .....	A.10
Peer-Supported Recovery And Rehabilitation Services.....	A.11
Homeless Outreach Services.....	A.11
Homeless Funds .....	A.12
Short Term and Bridge Housing .....	A.12
Emergency Shelter Beds.....	A.12
Staff Productivity Standard.....	A.13
Additional References .....	A.13

### B. COMPLIANCE AND CONFIDENTIALITY

County Compliance Programs .....	B.1
Contracted Compliance Programs.....	B.1
Compliance Standards .....	B.1
MHP's Compliance Hotline .....	B.2
Mandated Reporting .....	B.2
Documentation Requirements .....	B.2
Claiming and Reimbursement of Mental Health Services .....	B.3
Coding And Billing Requirements .....	B.3
False Claims Act .....	B.4
Program Integrity - Service Verification.....	B.5
Confidentiality .....	B.5

MHP Responsibilities .....	B.5
Notice of Privacy Practices .....	B.6
Uses and Disclosures of Records.....	B.6
Client Requests for Records .....	B.7
Client Requests for Amendment and Client Requests for Accounting of Disclosure .....	B.8
Handling/Transporting Medical Record Documents .....	B.8
Privacy Incidents .....	B.9
Privacy Incident Reporting (PIR) for Staff and Management .....	B.9

### C. ACCESSING SERVICES

Emergency Psychiatric Condition.....	C.1
Urgent Psychiatric Condition .....	C.1
Routine Condition.....	C.1
Access And Crisis Line (ACL).....	C.2
MHP Services Authorization Requirement Provided by Optum .....	C.2
Referrals To The ACL .....	C.3
Provider Interface With The ACL .....	C.3
Receiving Referrals From The ACL .....	C.3
Hours Of Service Availability .....	C.4
Language Assistance.....	C.4
Provider Selection, Terminations, Incentives.....	C.5
Requests for Continuity of Care.....	C.5
Validating Pre-existing Provider Relationships .....	C.6
Timeline Requirements .....	C.6
Requirements Following Completion of Continuity of Care Request.....	C.7
Repeated Requests for Continuity of Care.....	C.8
Beneficiary and Provider Outreach and Education .....	C.8
Reporting Requirements .....	C.9
Continuity of Care Requests Processed by ASO .....	C.9
Clients Who Must Transfer To A New Provider .....	C.9
Non-Mental Health Plan Services: Screening, Referral And Coordination .....	C.10
Urgent Walk-In Clinical Standards For Programs With Urgent Walk-In Services (AMHS).....	C.10
Urgent Psychiatric Condition .....	C.10
Exodus And Jane Westin - Full Time Access.....	C.10
Outpatient Clinics With Walk-In Urgent Components.....	C.11
Access To Electronic Health Record (EHR).....	C.12
All Programs .....	C.12
Priority List.....	C.13
Referral Process for Strength-Based Case Management & Assertive Community Treatment Services .....	C.13
Assisted Outpatient Treatment /Laura's Law.....	C.13
Accessing Secure Facility/Long-Term Care (SF/LTC)- Adult Mental Health Services .....	C.15
Referral Process.....	C.16
Target Population .....	C.17
Eligibility Criteria For Admittance To SF/LTC .....	C.17
To County Funded Secure Facilities/Long Term Care .....	C.17
To San Diego County Funded SNF Patch Facilities .....	C.18
To Vista Knoll.....	C.18
To A State Psychiatric Hospital.....	C.18
Reviews Of Determination Decisions .....	C.19
Placement .....	C.19
Placement In A State Hospital.....	C.20

Transitional Age Youth (TAY) Referral Process.....	C.20
Identify The Appropriate Level Of Service.....	C.21
Identify The System Target Population.....	C.22
Coordinate Care Between Sectors.....	C.24
Coordinate Care When Making Referrals .....	C.24
Procedures To Follow If Unsuccessful Routine Referral .....	C.25
Accessing Services - Children, Youth And Families Services (CYFS).....	C.26
Organizational Provider Outpatient Services Or County Operated Services.....	C.26
Day Intensive and Day Rehabilitative Services (CYFS).....	C.27
Service Priority For Outpatient Assessment Services - CYFS.....	C.27
Therapeutic Behavioral Services (TBS) .....	C.28
Utilization Review .....	C.28
Dual Diagnosis Capable Programs.....	C.28
Mental Health Services for Indian Enrollees .....	C.29
Residency .....	C.29

### D. PROVIDING SPECIALITY MENTAL HEALTH SERVICES

Adult/Older Adult System Of Care.....	D.1
Coordination Of Care: Creating a Seamless System of Care .....	D.1
Post Discharge Coordination Of Care .....	D.1
Outpatient, Case Management and Assertive Community Treatment Services.....	D.2
Medical Necessity For Outpatient, Case Management and Assertive Community Treatment Services .....	D.2
Specific Procedures And Criteria For Case Management and Assertive Community Treatment Services....	D.3
Brief Description of Services Available .....	D.3
Clinical Assessment For Medical Necessity .....	D.4
Strengths-Based Case Management.....	D.4
Assertive Community Treatment .....	D.5
Overview .....	D.6
Initial Face-to-Face Visits .....	D.9
On-Going Face-to-Face Visits .....	D.10
Augmented Services Program .....	D.11
Peer Led Interventions.....	D.11
Telehealth Services .....	D.12
Videoconferencing Guidelines for Telepsychiatry .....	D.12
Crisis Stabilization Services.....	D.13
Inpatient Services For Medi-Cal Beneficiaries .....	D.15
Pre-Authorization Through Optum.....	D.15
Medical Necessity For Adult/Older Adult Inpatient Services.....	D.15
Inpatient Services For Non-Medi-Cal Eligible Clients (Non-Insured) .....	D.16
Crisis Residential Services .....	D.16
Mental Health Services To Parolees.....	D.16
Correctional Program Checklist (CPC) .....	D.17
Mental Health Services To Veterans.....	D.18
Referral Process For Providing Mental Health Services To Veterans.....	D.18
Adult/Older Adult Mental Health Services .....	D.18
Veterans Service Office .....	D.19
Missed Appointments and Follow Up Standard .....	D.19
For New Referrals .....	D.19
For Current Clients .....	D.19
Utilization Management.....	D.20
Utilization Review For Crisis Residential Programs.....	D.20

Utilization Review For Outpatient Programs .....	D.21
Outpatient Guidelines .....	D.21
Brief Solution-Focused Outpatient Services.....	D.21
Initial Eligibility For Services.....	D.22
Eligibility For Ongoing County Or Contracted Program Outpatient Services .....	D.22
Utilization Management Process for Outpatient Programs.....	D.23
Utilization Review Committee (URC).....	D.24
Outcome Measures .....	D.24
Utilization Review For Case Management Programs .....	D.25
Children's System Of Care .....	D.26
Screening .....	D.26
Medical Necessity.....	D.27
Outpatient And Day Services Clients.....	D.28
Seriously Emotionally Disturbed (SED) Clients .....	D.28
Outpatient Services.....	D.29
Outpatient Short Term Model.....	D.29
Authorization For Reimbursement Of Services.....	D.29
Utilization Management.....	D.30
Medication Only Services.....	D.31
Procedure For Medication Only Clients.....	D.31
School Interface .....	D.33
Intensive Services.....	D.34
Day Rehabilitation.....	D.34
Day Intensive.....	D.34
Day School Services .....	D.34
Residential OP .....	D.35
Authorization Process for Intensive Services .....	D.35
Intensive Service Request (ISR) Information.....	D.36
Utilization Review.....	D.37
Out Of County Medi-Cal Clients .....	D.37
Authorization Of Reimbursement Of Services .....	D.37
AB 1299 for Foster Youth .....	D.37
SB 785 for AAP and KinGAP.....	D.37
Program Procedure(s) For Medi-Cal Eligible Children In Foster Care Under AB1299 .....	D.38
Program Procedure(s) For Medi-Cal Eligible Children In AAP/KinGAP Under SB 785 .....	D.38
Therapeutic Behavioral Services (TBS).....	D.39
Utilization Review.....	D.40
Early & Periodic Screening, Diagnosis & Treatment (EPSDT) Brochure .....	D.40
Pathways to Well-Being Overview .....	D.40
California's Continuum of Care Reform.....	D.41
Serving Youth With an Open CWS Case .....	D.42
Eligible for Enhanced Services (Subclass).....	D.43
Child and Family Team .....	D.43
CFT Meeting Facilitation Program .....	D.45
Intensive Care Coordination (ICC).....	D.45
Intensive Home-Based Services .....	D.46
Therapeutic Foster Care .....	D.47
Data Reporting.....	D.47
Bulletins .....	D.48
Trainings .....	D.48
Forms .....	D.49
Resources.....	D.49

IPC and CFT Meeting .....	D.50
Short Term Residential Treatment Programs (STRTP) Services .....	D.50
References .....	D.51
BHS Pathways to Well-Being and Continuum of Care Reform Programs .....	D.52
QI Program Monitoring.....	D.52
Financial Eligibility and Billing Procedures.....	D.52

### E. INTEGRATION WITH PHYSICAL HEALTH CARE

Coordination With Primary Care Physicians .....	E.1
Pharmacy And Lab Services.....	E.1
Managed Care Plan Medi-Cal Beneficiaries .....	E.1
Medi-Cal Beneficiaries Not Enrolled In An HMO .....	E.2
Non Medi-Cal Beneficiaries .....	E.2
Physical Health Services While In A Psychiatric Hospital .....	E.2
Healthy San Diego Recipients.....	E.3
Medi-Cal Beneficiaries Not Enrolled In Healthy San Diego Health Plans .....	E.3
Transfers From Psychiatric Hospital To Medical Hospital .....	E.3
Medical Transportation .....	E.3
Home Health Care.....	E.4
Clinical Consultation With Primary Care.....	E.4

### F. BENEFICIARY RIGHTS, GRIEVANCE AND APPEALS

Client Rights And Protections .....	F.1
Additional Client Rights .....	F.2
Provider Selection.....	F.2
Second Opinion .....	F.2
Transfer From One Provider To Another.....	F.2
Right To Language, Visual And Hearing Impairment Assistance .....	F.3
Right To A Patient Advocate .....	F.3
Advance Health Care Directive Information .....	F.3
Periodic Notice Of Clients' Rights.....	F.4
Beneficiary Grievance and Appeal Process .....	F.4
Grievance Resolution At Provider Sites .....	F.5
Grievance Process.....	F.6
Grievance Resolution .....	F.6
Grievance Process Exemptions.....	F.7
Adverse Benefit Determination .....	F.7
Written Notice of Adverse Benefit Determination Requirements .....	F.7
Timing of the Notice .....	F.8
Written NOABD Templates.....	F.9
Appeal Process .....	F.10
Authorized Representatives .....	F.11
Standard Resolution of Appeals .....	F.11
Extension of Timeframes .....	F.11
Expedited Resolution of Appeals.....	F.12
General Expedited Requirements .....	F.12
Notice of Appeal Resolution (NAR) Requirements.....	F.12
NAR Adverse Benefit Determination Upheld Notice.....	F.13
NAR "Your Rights" Notice .....	F.13

NAR Adverse Benefit Determination Overturned Notice.....	F.13
State Fair Hearing .....	F.14
Non-Discrimination and Language Assistance Notice.....	F.14
Provider Appeal Process .....	F.15
Considerations for Minors .....	F.15
Monitoring The Beneficiary and Client Problem Resolution Process .....	F.15

### G. QUALITY MANAGEMENT PROGRAM

Measuring Client Satisfaction .....	G.2
Adult/Older Adult System Of Care.....	G.2
Children, Youth and Family System Of Care.....	G.3
Provider Feedback.....	G.3
Medi-Cal Certification and Recertification.....	G.3
Monitoring The Service Delivery System .....	G.4
Uniform Medical Record - Forms and Timeliness.....	G.4
Staff Signature Logs .....	G.5
Timeliness of Documentation Standard.....	G.5
Medical Record Reviews .....	G.6
Program Responsibility .....	G.6
County Quality Management Reviews .....	G.6
Program Quality Improvement Plan (QIP) .....	G.7
Medi-Cal Recoupment And Appeals Process .....	G.9
Site Reviews.....	G.10
Medication Monitoring For CYF and AOA SOC.....	G.10
Procedures For Medication Monitoring Reporting.....	G.11
Report Instructions.....	G.11
CYF System Of Care: Storage, Assisting With Self Administration, And Disposal Of Medications.....	G.12
Storage Of Medications.....	G.13
Assisting In The Self Administration .....	G.13
Disposal Of Medications.....	G.13
Accessibility Of Services.....	G.13
Access Times .....	G.14
Client And Performance Outcomes .....	G.14
Adult System Of Care .....	G.14
Child, Youth and Family System of Care.....	G.15
Monthly/Quarterly Status Report (M/QSR) .....	G.16
Mental Health Services Act (MHSA) Outcomes .....	G.16
Performance Improvement Projects (PIPs) .....	G.16
Serious Incident Reporting (SIR).....	G.17
Serious Incident Categories: Level One And Level Two.....	G.17
Serious Incident Reporting Procedures.....	G.19
Clinical Case Reviews .....	G.20
Level One Serious Incident Reporting On Weekends And Holidays.....	G.20
Privacy Incident Reporting (PIR) for Staff and Management .....	G.21
Unusual Occurrence Reporting .....	G.22
Safety And Security Notifications To Appropriate Agencies.....	G.22
Child, Youth And Family: Additional Reporting .....	G.23
Quality Review Council (QRC) .....	G.23
National Voter Registration Act (NVRA).....	G.24

### H. CULTURAL COMPETENCE

History And Background .....	H.1
Cultural Competence Plan.....	H.1
Current Standards And Requirements.....	H.2
Culturally And Linguistically Appropriate Services (CLAS) Standards .....	H.2
Cultural Competence Training/Opportunities Through The MHP.....	H.3
Cultural Competence Monitoring And Evaluation .....	H.4
Program Level Requirements.....	H.4
Staffing Level Requirements .....	H.5
Consumer Preference: Cultural/Ethnic Requirements .....	H.6
Consumer Preference: Language Requirements .....	H.6
Additional Recommended Program Practices .....	H.7

### I. MANAGEMENT INFORMATION SYSTEM

Cerner Community Behavioral Health (CCBH) .....	I.1
User Account Set Up And Access .....	I.1
Technical Requirements To Access CCBH .....	I.1
Staff Set Up And User Account Access .....	I.2
Staff Assignment To Unit(s) And SubUnit(s) .....	I.3
User Assignment To A Menu Group.....	I.3
Limitation Of Staff Assignment To "Data Entry - Add New Clients" Menu Group .....	I.4
Staff Access To Live Production And Training Environment In CCBH.....	I.4
Program Manager/Supervisor Responsibility For Staff Access And Security.....	I.4
Staff Termination Process.....	I.4
Routine User Termination .....	I.4
Quick User Termination .....	I.5
Application Training .....	I.5
User Manuals .....	I.5
Security And Confidentiality .....	I.5
Passwords .....	I.5
Unauthorized Viewing Of County Data.....	I.6
User Support .....	I.6
Quick Resource Guide.....	I.7

### J. PROVIDER CONTRACTING

Disclosure Requirements.....	J.1
Program Monitoring .....	J.2
Contractor Orientation .....	J.3
Notification In Writing Of Status Changes .....	J.3
Site Visits .....	J.3
Corrective Action Notice .....	J.4
Monthly and Quarterly Status Reports .....	J.4
Contract Issue Resolution .....	J.4
Local Emergency Response .....	J.4
Disaster Response .....	J.5
Transportation Of Clients.....	J.5
Claims And Billing For Contract Providers.....	J.6
Contractor Payments .....	J.6

Budgets, Cost Reports And Supplemental Data Sheets And Claims (Invoices).....	J.6
Medi-Cal Billing to the State .....	J.6
Submitting Claims (Invoices) For Services.....	J.6
Overpayment.....	J.7
Certification On Disbarment Or Exclusion.....	J.7
Social Security Death Master File Verification.....	J.7
National Provider Identification Verification .....	J.8
License Verifications .....	J.8
Short-Doyle Medi-Cal .....	J.8
Definitions .....	J.8
Medi-Cal Revenue .....	J.9
Medi-Cal Disallowance/Recoupment of Federal Financial Participation (FFP) Dollars .....	J.9
Billing Disallowances - Provider Self Report .....	J.10
Procedures.....	J.10
Provider Requirements .....	J.11
BHS Contract Support Procedures.....	J.11
Billing Inquiries .....	J.12
Inventory Guidelines for County Contracts.....	J.12
Definitions .....	J.12
Capital (Fixed) Assets/Equipment.....	J.12
Minor Equipment .....	J.13
Consumable Supplies .....	J.13
Internal Controls and Procedures.....	J.13
Disposition .....	J.14
Stolen, Damaged or Missing Equipment .....	J.15
Vehicles.....	J.15
Inventory Disposition .....	J.15
BHS Property Inventory Form.....	J.15
DPC 203 Transfer or Disposition of Minor Equipment Form(s) .....	J.16
Non-IT Disposal Requests.....	J.17
IT Disposal Requests .....	J.17
Mobile Devices Disposal Requests.....	J.19
Electronic Property/IT .....	J.20
Contractors Inventory Minimum Guidelines on a Cost Reimbursement and Fixed Price Contract.....	J.20
Definitions .....	J.20
Client Data .....	J.20
Portable Devices.....	J.20
Portable Media.....	J.20
Minimum Guidelines .....	J.20

### K. PROVIDER ISSUE RESOLUTION

Informal Process .....	K.1
Formal Provider Problem Resolution Process .....	K.1
Formal Provider Appeal Process .....	K.2
Quality Improvement Process .....	K.3
Contract Administration And Fiscal Issues With MHP Contracts.....	K.3

### L. PRACTICE GUIDELINES



Treatment Of Co-Occurring Substance Abuse And Mental Health Disorders Comprehensive, Continuous, Integrated System Of Care (CCISC) Model .....	L.1
For adults clients.....	L.1
For children/youth clients .....	L.1
For adult clients .....	L.2
For child/youth clients .....	L.2
Dual Diagnosis Capable Programs.....	L.2
Drug Formulary for HHS Mental Health Services .....	L.4
Monitoring Psychotropic Medications .....	L.4
Antipsychotic Medications .....	L.4
Clinical Advisory On Monitoring Antipsychotic Medications.....	L.5
Children Youth and Families .....	L.6
Monitoring Controlled Substance Prescriptions.....	L.7
Client/Family Education Program .....	L.7

### M. STAFF QUALIFICATIONS AND SUPERVISION

Credentialing and Recredentialing .....	M.1
Adult And CYF Systems Of Care .....	M.4
Professional Licensing Waiver Guidelines .....	M.4
Clearances For Work With Minors .....	M.6
Licensed Professional Counselors (LPCCs) and PCC Interns .....	M.7
Documentation And Co-Signature Requirements .....	M.7
Staff Supervision And Management Requirements .....	M.8
Staffing Requirements.....	M.9
Use Of Volunteers And Masters Level Student Interns .....	M.9
Adult/Older Adult System Of Care.....	M.10
Mental Health Rehabilitation Specialist (MHRS) .....	M.11
CYF System Of Care .....	M.11

### N. DATA REQUIREMENTS

Data Collection And Retention.....	N.1
Accuracy Of Data .....	N.1
Financial Eligibility And Billing Procedures.....	N.1
Medi-Cal Administrative Activities (MAA) .....	N.1
Additional Outcome Measures .....	N.2
Mental Health Services Act (MHSA) .....	N.2
MHSA Community Services And Support (CSS).....	N.2
MHSA Prevention And Early Intervention (PEI) .....	N.2
MHSA Innovation.....	N.3
MHSA Workforce Education And Training (WET) .....	N.3
MHSA Full Service Partnerships (FSP) .....	N.3
Outcome Measures - Adult System Of Care .....	N.3
Milestones Of Recovery Scale (MORS) .....	N.3
Level Of Care Utilization System (LOCUS).....	N.3
Recovery Markers Questionnaire (RMQ).....	N.4
Illness Management And Recovery (IMR).....	N.4
Outcome Measures Manual .....	N.4
Outcome Measures - Children's System Of Care .....	N.4

# Organizational Provider Operations Handbook

## TABLE OF CONTENTS

Data Collection And Retention .....	N.4
Outcome Tools And Requirements .....	N.4
Symptoms/Functioning Outcomes .....	N.5
Pediatric Symptom Checklist (PSC) .....	N.5
Child and Adolescent Needs and Stegnths (SD-CANS).....	N.5
CRAFFT .....	N.5
Personal Experience Screening Questionnaire (PESQ) .....	N.6
Discharge Outcomes Objectives .....	N.6
Youth Services Survey (YSS).....	N.7
Substance Use Disorder Counselor Satisfaction Survey .....	N.7
Satisfaction Outcomes .....	N.7
Medication Only Clients .....	N.8
Additional Outcome Objectives.....	N.8
All Providers .....	N.8
Outpatient Providers.....	N.8
Day Treatment Providers.....	N.9
Research Projects Involving Children's Mental Health Clients .....	N.9

### O. TRAINING

Cultural Competency Training .....	O.1
BHS Disaster Training .....	O.1
System Of Care Training .....	O.1
Continuing Education Units (CEUs).....	O.1
The Quality Management Unit.....	O.1
Electronic Health Record Trainings .....	O.2

### P. MENTAL HEALTH SERVICES ACT - MHSA

MHSA System Transformation.....	P.1
MHSA Full Service Partnerships .....	P.1

### Q. PAYMENT SCHEDULE AND BUDGET GUIDELINES FOR COST REIMBURSEMENT

Budget Guidelines.....	Q.1
Total Direct Labor Cost .....	Q.1
Total Other Direct Cost.....	Q.3
Fixed Assets .....	Q.4
Total Indirect Cost.....	Q.5
Units of Service .....	Q.5
Start-Up Funds (for Procurement Budget only) .....	Q.5

### R. QUICK REFERENCE GUIDE

Phone Directory .....	R.1
Access And Crisis Line (ACL).....	R.1
County Of San Diego MHP Administration.....	R.1
Optum (Administrative Services Organization) .....	R.1
Client Advocacy Organizations .....	R.1

Organizational Provider Operations Handbook  
County of San Diego Health & Human Services Agency  
[Appendix to Mental Health Plan and Incorporated by Reference into Provider Contracts]

# Organizational Provider Operations Handbook

## TABLE OF CONTENTS

American Sign Language (ASL) Interpreter Services.....	R.2
Internet Resources.....	R.2

### LIST OF APPENDICES

#### APPENDIX A

Referral To Primary Care Form.....	A.A.1
Authorization To Use Or Disclose PHI.....	A.A.2
HOW Service Model Data Collection Flow.....	A.A.3

#### APPENDIX B

Documentation Standards For Client Records.....	A.B.1
Privacy Incident Reporting Process for Programs.....	A.B.2
Privacy Incident Report.....	A.B.3

#### APPENDIX C

Request For Services Log with Access Times.....	A.C.1
AMHS - Walk-In Clinic Hours Contacts.....	A.C.2
Transition Age Youth Referral Form.....	A.C.3
Transition Age Youth Referral Plan.....	A.C.4
Reestablishment Recommendation Form.....	A.C.5
Request For Services Access Times Log Manual.....	A.C.6
Written Translation Service Authorization Form.....	A.C.7
Service Authorization Request Form.....	A.C.8

#### APPENDIX D

Medical Necessity Criteria For MHP.....	A.D.2
California State Penal Institutions List.....	A.D.3
Request For Verification Of Veterans Eligibility.....	A.D.4
START TCC And URC Record.....	A.D.5
START URC Minutes Form.....	A.D.6
UM Treatment Justification.....	A.D.7
OP UR Committee Minutes.....	A.D.8
OP UR Committee Minutes - Page 2.....	A.D.9
Case Management Six Month Review Progress Note.....	A.D.10
Case Management URC Record.....	A.D.11
Case Management URC Minutes.....	A.D.12
Utilization Review Committee Form.....	A.D.13
UM Auth Request Form-Fill.....	A.D.14
Outpatient Level of Care.....	A.D.15
DPR - Intital.....	A.D.16
DPR - Specialty Services.....	A.D.17
DPR - Continuing.....	A.D.18
Service Authorization Request-SAR.....	A.D.19
TBS Brochure In English.....	A.D.20

# Organizational Provider Operations Handbook

## TABLE OF CONTENTS

Therapeutic Behavioral Services (TBS) Referral Form .....	A.D.21
---	--------

### APPENDIX E

Final Coordination Of Care Form English .....	A.E.1
HSD Plan Partner Card .....	A.E.2
Plan Partner Identification For Pharmacies .....	A.E.3
Final Coordination Of Care Form Arabic.....	A.E.4
Final Coordination Of Care Form Spanish.....	A.E.5
Final Coordination Of Care Form Tagalog.....	A.E.6
Final Coordination Of Care Form Vietnamese.....	A.E.7

### APPENDIX F

None

### APPENDIX G

Reasons For Recoupment 16-17 .....	A.G.1
MRR Appeal Instructions.....	A.G.2
Med Monitoring Screening Tool - Adult .....	A.G.3
Med Monitoring Screening Tool - Child & Adolescent.....	A.G.4
Med Monitoring McFloop Form .....	A.G.6
AMH Quarterly Status Report.....	A.G.7
CMH Quarterly Status Report.....	A.G.8
BHS Serious Incident Report .....	A.G.9
BHS Serious Incident Report of Findings (Form Fill Version - Available on OPTUMHEALTH Website) .....	A.G.10
Serious Incident Root Cause Analysis Worksheet.....	A.G.11
Serious Incident Root Cause Analysis Worksheet Sample .....	A.G.12
Medication Monitoring Submission Form - Adult.....	A.G.13
Medication Monitoring Submission Form - Children .....	A.G.14
Perpetual Inventory Medication Log.....	A.G.15
Medication Disposal Log .....	A.G.16
New Program Orientation .....	A.G.17
NVRA Voter Preference Form Arabic .....	A.G.18
NVRA Voter Preference Form English .....	A.G.19
NVRA Voter Preference Form Spanish.....	A.G.20
NVRA Voter Preference Form Tagalog .....	A.G.21
NVRA Voter Preference Form Vietnamese .....	A.G.22
Privacy Incident Report.....	A.G.23

### APPENDIX H

None

### APPENDIX I

Anasazi Request Form .....	A.I.1
Summary Of Policies .....	A.I.2
E-Signature Agreement.....	A.I.3

# Organizational Provider Operations Handbook

## TABLE OF CONTENTS

### APPENDIX J

BHS Inventory Form..... A.J.1  
DPC\_203 Contractor ..... A.J.2  
DPC\_203 Mobile Devices ..... A.J.3  
DPC\_203 Mobile Devices SUPPLEMENTAL..... A.J.4

### APPENDIX K

Formal Complaint By Provider Form ..... A.K.1  
Formal Response To Complaint Form ..... A.K.2  
Formal Appeal By Provider Form ..... A.K.3  
Formal Appeal Response Form ..... A.K.4

### APPENDIX L

Monitoring Psychotropic Medications ..... A.L.1

### APPENDIX M

Professional Licensing Waiver Request Form ..... A.M.1

### APPENDIX N

None

### APPENDIX O

None

### APPENDIX P

None

### APPENDIX Q

None

### APPENDIX R

None

### ABBREVIATIONS REFERENCE GUIDE

ACL – Access and Crisis Line  
AMHS – Adult Mental Health Services  
A/OAMHS – Adult/Older Adult Mental Health Services  
ASP – Augmented Services Program  
ASW – Associate Social Worker (registered with the BBS)  
BBS – Board of Behavioral Sciences  
B&C – Board and Care  
CA-QOL – California Quality of Life (client survey)  
CMUMC – Case Management Utilization Management Committee  
CCHEA – Consumer Center for Health Education and Advocacy  
CCISC – Comprehensive, Continuous Integrated System of Care  
CCR – California Code of Regulations  
CCRT – Cultural Competence Resource Team  
CFR – Code of Federal Regulations  
CMHS – Children’s Mental Health Services  
CMS – County Medical Services  
COR – Contracting Officer Representative  
CSS – Community Services and Support  
DCS – Deaf Community Services  
DHS – Department of Health Services (State of California)  
DMH – Department of Mental Health (State of California)  
DSM-IV-TR – Diagnostic and Statistical Manual of Mental Disorders, Fourth Edition, Text Revision  
ERMHS – Educationally Required Mental Health Services  
ECR – Error Correction Reports  
EPU – Emergency Psychiatric Unit  
FFP – Federal Financial Participation  
FFS – Fee-For-Service  
FSP - Full Service Partnerships  
FTE – Full-Time Equivalent  
HHSA – Health and Human Services Agency  
HIPAA – Health Insurance Portability and Accountability Act  
HMO – Health Maintenance Organization  
ICM – Intensive Case Management  
IMF – Intern Marriage and Family Therapist (registered with the BBS)  
IMD – Institute of Mental Disease  
LCSW – Licensed Clinical Social Worker  
LPS – Lanterman-Petris-Short (Conservatorship)  
McFloop – Multi-Use Complete Feedback Loop  
MFT – Marriage and Family Therapist  
MHP – Mental Health Plan  
MHS – Mental Health Services

MHSA – Mental Health Services Act  
MHSIP – Mental Health Statistics Improvement Program  
MIS – Management Information Systems  
MSR – Monthly Status Report  
NOA-A – Notice of Action – Assessment  
NOA –B – Notice of Action  
OIG – Office of Inspector General  
OP – Outpatient  
OptumHealth – Optum Health  
P&T – Pharmacy and Therapeutics Standards and Oversight Committee  
PEI - Prevention and Early Intervention  
PCR – Program Contract Representative (Program Monitor)  
PSR – Psychosocial Rehabilitation  
QM – Quality Improvement  
QM – Quality Management  
QRC – Quality Review Council  
SES – Special Education Services  
SMA – Statewide Maximum Allowances  
SDCMHA – San Diego County Mental Health Administration  
SDCPH – San Diego County Psychiatric Hospital  
SF/LTC – Secure Facility/Long-Term Care  
SNF/STP – Skilled Nursing Facility/Special Treatment Program  
SOC – Systems of Care  
TAR – Treatment Authorization Request  
TBS – Therapeutic Behavioral Services  
TBI – Traumatic Brain Injuries  
UBH – United Behavioral Health  
UM – Utilization Management  
UMDAP – Uniform Method for Determining Ability to Pay  
UR – Utilization Review  
URC – Utilization Review Committee  
USD – University of San Diego (Patient Advocacy Program)  
W&IC – Welfare & Institutions Code (State of California)  
WET - Work Force Education and Training

[Blank page]