

MARCH 2023

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NEW FEATURE! Ask QM Corner

Required CalAIM Documentation Trainings

All BHRS (county and CBO) direct service staff

- Some staff still need to complete these newer training modules that were added in October 2022: **Screening, Transition of Care Tool, and Discharge Planning.**
- All direct service (**both MHP and DMC-ODS**) staff are required to complete **all 9** online modules of the CalMHSA CalAIM trainings.
- **All training must be completed ASAP as we are required to report completion rates to DHCS.**

Link to CalMHSA CalAIM trainings: <https://www.calmhsa.org/doc-trainings/>

New LMS CalAIM Trainings

Staff administering Transition of Care, and Adult and Youth Screening Tools

- There are two new LMS trainings:
 - **Administering the Adult & Youth Screening Tools** (New in February 2023)
 - **Administering the Transition of Care Tool** (New in February 2023)
- These two trainings are a supplement to the preexisting Screening and Transition Tool trainings that have been available in the LMS since summer 2022.
- If you administer either the **Adult and Youth screening tools** or the **Transition of Care tool**, please complete these two new CalMHSA supplemental trainings.

The trainings have been uploaded to CalMHSA's LMS at: <https://moodle.calmhsalearns.org/login/index.php>

New BHRS Utilization Management Policies

- There are two new BHRS policies regarding oversight of Specialty Mental Health Services and Substance Use Disorder Services.
- See attached for new SUS and SMHS UR tools developed by CalMHSA, which the UR team will be piloting in upcoming reviews.
- Also see attached for full policies or review here:

[BHRS 98 Utilization Management \(UM\), Audit, Oversight and Recoupment Standards for Specialty Mental Health Services \(SMHS\) | MARIN COUNTY BHRS](#)

[BHRS 99 Utilization Management \(UM\), Audit, Oversight and Recoupment Standards for Substance Use Disorder \(SUD\) Services | MARIN COUNTY BHRS](#)

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Ask QM Corner

Dear QM Corner,

I thought Client Plans were a thing of the past. So why do I keep getting told I need to write a Client Plan Brokerage note? Like a Client Plan in a Brokerage note? Say what??? And how will the client even sign that? This sounds fishy.

-Impacted by documentation changes

Dear Impacted,

Change is hard. You know what is harder: carbon nanotubes - harder than diamonds they say. Or does paper cover carbon nanotubes? Anyway, while it is true that Client Plans have been largely replaced by the Problem Lists, there are some services that do still require some form of the CP to be in place. A Client Plan should indeed be written directly into the narrative section of an initial Brokerage note in order to authorize those services on an ongoing basis. This can be a few quick lines about the goals and purpose of these services. And there is no need for the client to sign and no end date is needed, so this will allow Brokerage services to be provided indefinitely (until the goals change and a new plan can be documented). FYI - youth services, such as ICC, IHBS, TFC, and TBS still require traditional Client Plans with authorization dates and client signatures.

-QMC

Dear QM Corner,

Yesterday I got locked out of my house, my car, and CG all in one day. It is really hard to keep all the lock-outs straight. What are the rules again?

-Hope for the key

Dear Hope,

It's true there are a few different ways to get locked out. There are limitations to our billing when a client is also being served at different facilities, such as an Institution for Mental Disease, Skilled Nursing Facility, Psychiatric Hospital, Crisis Stabilization Unit, or Jail (to name a few). To be honest, we at QM Corner sometimes forget all the specific rules and scenarios. That's why the Clinical Documentation Guide is our home page – it's our own special hide-a-key. It has all the rules in a very handy "lockout assistant" in appendix F, which lays out the specific facilities that can lead to a lockout and what is or isn't billable. Also keychains can be useful.

-QMC

Letters to the editor can be submitted to lschliesmann@marincounty.org and jsilverstein@marincounty.org

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All documentation training and manuals are available here:

<https://www.marinbhrs.org/providers/mental-health-providers/clinical-documentation-guide>

Share with your staff so they are in the know!