

Screening & Transition of Care Tools

August 9, 2023

Managed Care Policy and Monitoring Division

Agenda

- » Background on STT
- » New FAQs
- » Q&A

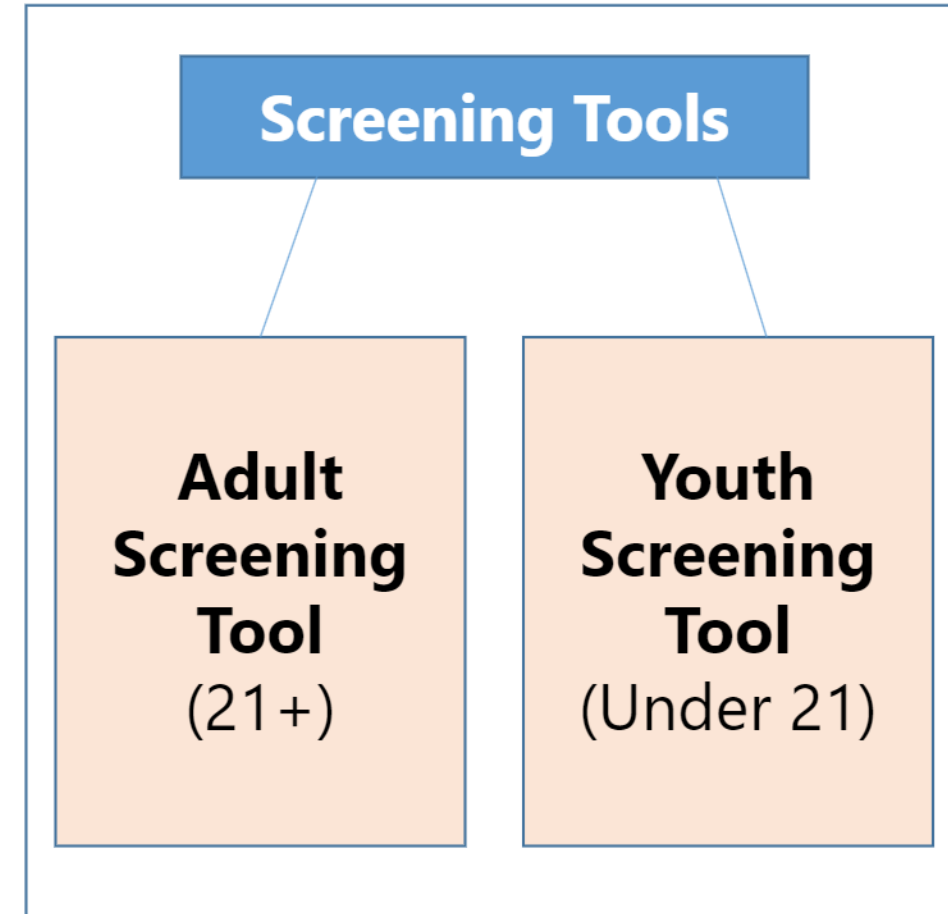


Background

- » Previously, multiple mental health screening and transition tools were in use for Medi-Cal beneficiaries across the state, which led to inconsistencies around when and how beneficiaries were referred to county networks and managed care plan networks.
- » To streamline this process and improve patient care, DHCS developed standardized Screening and Transition of Care Tools for Medi-Cal Mental Health Services.
- » Statewide implementation of the initiative began on January 1, 2023.

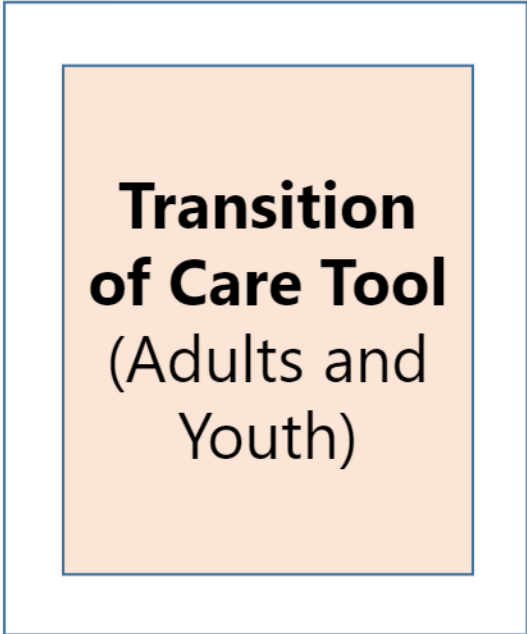
Adult and Youth Screening Tools for Medi-Cal Mental Health Services

- » The Adult and Youth Screening Tools for Medi-Cal Mental Health Services determine the appropriate delivery system for beneficiaries who are not currently receiving mental health services when they contact the Medi-Cal Managed Care Plan (MCP) or county Mental Health Plan (MHP) seeking mental health services.
- » Distinct Screening Tools have been developed for Adults ages 21 and over and Youth under age 21.



Transition of Care Tool for Medi-Cal Mental Health Services (Adult and Youth)

- » The Transition of Care Tool for Medi-Cal Mental Health Services supports timely and coordinated care for individuals currently receiving mental health services. This tool is used when completing a transition of services to the other delivery system (i.e., MCP to MHP or MHP to MCP) or adding a service from the other delivery system.
- » A single Transition of Care Tool has been developed for all beneficiaries, including Adults and Youth.



**Transition
of Care Tool**
(Adults and
Youth)

New FAQs

- » In May 2023, DHCS released additional FAQs to provide further clarity and guidance on:
 - Purpose of Tools
 - Tool Administration
 - Scoring
 - Requirement for Use of Tools

- » All FAQs are available on the [Screening and Transition of Care Tools for Medi-Cal Mental Health Services FAQ webpage](#).

Purpose of Tools, Tool Administration, and Scoring

Frequently Asked Question

Q: Will DHCS make updates to the tools? If so, when?

» **A: DHCS may make updates to the tools** to improve clinical quality, incorporate related policy changes, address issues identified in implementation monitoring, or respond to stakeholder feedback. **There is no set timeframe for tool updates.** MCPs/MHPs will be informed of any updates in advance.

Frequently Asked Question

Q: Will there be training on how to use the Screening and Transition of Care Tools?

- » **A: MCPs and MHPs are responsible for training their staff on how to use the tools.**
- DHCS has hosted several technical assistance webinars that provide information on the purpose and contents of the tools, as well as related requirements. Webinar recordings are available on the DHCS [Screening and Transition of Care Tools for Medi-Cal Mental Health Services webpage](#).

Frequently Asked Question

Q: Can additional demographic fields be added to the Screening Tools?

» **A: No. Additional questions and fields cannot be added to the Screening Tools.**

- If MCPs or MHPs collect demographic information prior to or following the screening, for example as part of initial client intake or referral coordination, those processes are not considered part of screening and would not constitute an addition to the Screening tools. However, any processes to collect demographic information prior to screening should be brief in nature and must be immediately followed by the administration of the Adult or Youth Screening Tool.

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Frequently Asked Question (Cont'd)

Q: Can additional demographic fields be added to the Screening Tools?

- » **A** (continued): DHCS strongly encourages MCPs and MHPs to adjust policies, procedures, and workflows as necessary to improve the member experience. MCPs and MHPs must avoid duplication of screening processes for mental health services that are in excess of or inconsistent with the Screening and Transition of Care Tools and accompanying guidance.
 - DHCS will continue to monitor feedback on demographic fields within the Screening Tools to determine whether future changes should be made to the Screening Tools.

Frequently Asked Question

Q: Can additional information be provided as notes or attachments to the Screening Tools?

» **A: The content of the Screening Tools may not be altered.** MCPs/MHPs may not alter the order or wording of questions within the Screening Tools and additional questions may not be added to the tools. **MCPs/MHPs may, however, share additional information as part of the referral,** such as notes taken during the screening, if available and appropriate.

Frequently Asked Question

Q: When an individual answers yes to questions 6, 7, or 9 on the Youth Screening Tool, why do the instructions require the screener to stop the screening? Can the screener still ask the remaining screening questions?

» **A:** If a child/youth, or the person responding on their behalf, responds “Yes” to question 6, 7, or 9, in the Youth Screening Tool, **they meet criteria to access specialty mental health services** per BHIN 21-073. In these cases, the appropriate delivery system for clinical assessment (i.e., the MHP) has already been determined and, therefore, the remainder of the screening is not required. To minimize burden on the individual, the **screener must conclude the screening and refer the individual to the MHP** for clinical assessment and must not ask the remaining screening questions.

Frequently Asked Question

Q: If an individual has a total screening score of "0" does that mean they do not require mental health services in either delivery system?

» **A:** No. If an individual has a screening score of "0," they should be referred to the MCP for clinical assessment.

Requirements for Use of Tools

Frequently Asked Question

Q: Are the Screening Tools required when individuals are referred by a provider to an MCP for NSMHS or an MHP for SMHS?

» **A:** The Screening Tools are required for use when an individual who is not currently receiving mental health services contacts the MCP/MHP **directly** to seek services.

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Frequently Asked Question (Cont'd)

Q: Are the Screening Tools required when individuals are referred by a provider to an MCP for NSMHS or an MHP for SMHS?

» **A: If a provider** (e.g., a primary care physician or school nurse) specifically **refers an individual** to an MCP for non-specialty mental health services or to an MHP for specialty mental health services **based on an understanding of the individual's needs, the MCP/MHP is not required to use the Screening Tools.** MCPs/MHPs should follow existing protocols for provider referrals in these scenarios.

- For example, counties may have established referral pathways whereby schools or other service providers that have already conducted some level of screening send individuals who likely require specialty mental health services to the MHP.

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Frequently Asked Question (Cont'd)

Q: Are the Screening Tools required when individuals are referred by a provider to an MCP for NSMHS or an MHP for SMHS?

» **A:** Alternatively, **if a third party** (including but not limited to a health care provider) **simply connects the individual to the MCP/MHP as a resource** (e.g., gives them the MCP/MHP phone number for more information about what services may be available to them) **without having conducted a screening or brief assessment** to determine the appropriate delivery system for referral, the **Screening Tools must be used**.

Frequently Asked Question

Q: How will providers know if they are supposed to use the Transition of Care Tool?

» **A:** MCPs/MHPs are required to use the Transition of Care Tool to ensure individuals who are receiving mental health services from one Medi-Cal mental health delivery system receive timely and coordinated care when either: (1) their existing services need to be transitioned to the other delivery system; or (2) when services need to be added to their existing mental health treatment from the other delivery system (consistent with concurrent treatment under No Wrong Door policies described in BHIN 22-011 and APL 22-005).

MCPs/MHPs must update policies and procedures as needed to ensure compliance.

MCPs/MHPs are responsible for clarifying expectations for use of the Transition of Care Tool with providers and providing training on how and when to use the tool.

Frequently Asked Question

Q: Is the Transition of Care Tool required if an individual screens into the MCP or MHP but their clinical assessment indicates that they belong in the other system?

- » **A: Yes.** If an individual's screening score from either the Adult or Youth Screening Tool results in a referral to the MCP/MHP and their subsequent clinical assessment indicates that they should receive services in the other Medi-Cal mental health delivery system, the MCP/MHP should ensure the Transition of Care Tool is completed and the individual is referred to the other delivery system.
- Consistent with No Wrong Door policy described in BHIN 22-011 and APL 22-005, all NSMHS and SMHS services delivered during the assessment process are covered, even if the assessment ultimately determines they need to be referred to the other Medi-Cal mental health delivery system.

Provider Training

- » MCPs must ensure that all network providers are trained on use Screening and Transition of Care Tools
- » MCPs to submit a list/roster of providers that received training within 60 days of presentation (i.e. October 10, 2023) to the following inbox: MCQMD@dhcs.ca.gov

Q & A



Questions?

- » If you have additional questions, please e-mail DHCS at:
MCQMD@dhcs.ca.gov and/or
BHCalAIM@dhcs.ca.gov
- Subject Line "Screening and Transition of Care Tools"

Thank You

