Pre-Admission Activities: Contact/Screening/Referral

CalMHSA Multi-County EHR:
Session 2
Launch & Learn
Attend our EHR Sessions

01 EHR Workgroup Orientation
   May 19, 2021 12:00 PM – Zoom Link Here

02 Pre-Admission Activities: Client Contact/Screening/Referral
   May 26, 2021 12:00 PM – Zoom Link Here

03 Assessments and other Measures/Questionnaires
   Jun 2, 2021 12:00 PM – Zoom Link Here

04 Authorization Processes: Prior, Concurrent and Retrospective
   Jun 9, 2021 12:00 PM – Zoom Link Here

05 Caseload Management
   Jun 16, 2021 12:00 PM – Zoom Link Here

06 Consent Management
   Jun 23, 2021 12:00 PM – Zoom Link Here

07 Progress Notes
   Jun 30, 2021 12:00 PM – Zoom Link Here
Designing a BH Enterprise Health Record

Electronic Health Records are designed to support operations associated with the Treatment of a Client.

But CA BH Organizations are required to perform so many more functions.

Historically, we have tried to make our EHRs support all our functions and failed.
Launch and Learn Session 2
Our AIM Today:

• Define Terms

• Share Ideas

• Listen to Best Practices and Feedback
Agenda:

- Define
- Share ideas
- Listen to best practices

- Define
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Why We Are Here

• Interest in the Multi-County EHR is high because ALL counties have struggled to implement effective solutions.
• No one vendor has an off-the-shelf EHR that will meet our needs.
• A collaborative Multi-County solution will give us the critical mass required to engage a vendor to enhance their EHR workflows to meet California requirements.
• Success is dependent on creating a common/shared vision of how we will use this EHR.
• A spirit of compromise is necessary for us to build on a solid foundation of a common EHR workflow(s).
Poll Question 1
Pre- Admission Activities
Definition of Terms: Pre-Admission

- Interactions prior to becoming a “client”. Activities prior to a signed Consent for Treatment and admission to a program.

- Multiple County Use Cases:
  - 24/7 Access Call Line Logging
  - Incoming referrals from Partner Entities: Hospitals, Primary Care, Schools, Child Welfare, Justice System
  - Assisted Outpatient Treatment (AOT) Referrals
  - Outreach Activities
  - Mobile Crisis Episodes
  - Prevention and Early Intervention (PEI) Activities
  - Consumer-Run Wellness Centers
  - Medi-Cal Administrative Activities (MAA)

- Includes Contact, Master Person Index, Screening and Referrals
Poll Question 2
Pre-Admission Question:

• Are there any additional pre-admission activities to consider?

Feel free to unmute or use the chat feature!
Contact
Definition of Terms: Contact

• Contact: Interaction initiated by prospective client, family/community member or partner entity.

• Data can be collected with or without a “client name”
  • Organizing principle can be the contact (activity)
  • Organizing principle can be the staff person
Master Person Index

- Ability to create a “person” in the EHR prior to creating a treatment admission.
- A repository of demographic information about people who have been served across the entirety of the multi-county EHR.
- Demographic information about the person is not directly related to any one county.
Real Time Client Eligibility

- Information within the MPI will facilitate a Medi-Cal eligibility status lookup via real time 270/271 transaction.
Contact Questions:

• Do you currently have an integrated (MH and SUD) 24/7 Access Call Line?

• What are your best practices for tracking “pre-admission” contacts and activities?

Feel free to unmute or use the chat feature!
Screening
Screening: CalMHSA & CBHDA are supporting DHCS on a workgroup creating a standardized Level of Care screening- this is part of CalAIM.
Poll Questions 3, 4, 5 and 6
Screening Questions:

• Other than the State’s mandated screening tool, are there other screening tools that are essential for business within your county?
  • Are there screenings for special populations like justice-involved populations that we need to consider?

• What are your best practices for screening MH & SUD clients?

Feel free to unmute or use the chat feature!
Referral
Definition of Terms: Referral

- "Referral" is defined as a linkage to County Operated or Contractor Provided Treatment Services

- When clients are connected to treatment:
  - to Specialty Mental Health
  - to Substance Use Services
  - to a higher or lower level of care (mild to moderate vs specialty)
Referral

- Determine type of treatment (MHS / SUD)
- Workflow and data collection support timeliness metrics
- Referral follow up leads to an appointment
- Was appointment kept
  - Yes – Leads to a Treatment Episode
  - No – Second Appointment Booked ...
  - Etc
Poll Question 7
Feedback Loops and Reporting

• Tracking referrals and their outcomes ensures clients do not “fall through the cracks”.
• Leveraging the EHR to capture referrals into MH and SUD services allows us to quantify connections with partner systems (primary care, etc.) per our contract requirements.
Referral Questions:

- Are you currently doing closed loop referrals within your EHR?
- Are you currently exchanging referral information electronically with partners?
- Do you currently have a “no wrong door” policy?

Feel free to unmute or use the chat feature!
• All materials posted to our website
• Feel free to reach out, share ideas:
  • info@calmhsa.org
  • Next session (6/2) is on Assessments and Measures