

## Client Tracking Form Instructions

### REQUIRED FORM:

This form is a required document in the client file for Drug Medi-Cal Organized Delivery System (DMC-ODS) providers in Outpatient Services and Intensive Outpatient Services programs.

### WHEN:

At client's first billable service and every potentially billable visit thereafter

### COMPLETED BY:

Authorized agency representative

### REQUIRED ELEMENTS:

#### Page 1

- **IOS/OS/Recovery Services:** Check appropriate box: Intensive Outpatient Services (IOS), Outpatient Services (OS), or Recovery Services.
- **Client Name:** Complete with client's full name.
- **Client ID:** Complete the client ID number by entering the client's SanWITS' Unique Client Number (UCN).
- **Admit Date:** Complete the date of admission.
- **Date DMC Eligibility Began:** Complete the date of client's first month of DMC eligibility.
- **Tracking Chart:**
  - (1) **Service Date:** Complete each date of client's services.
  - (2) **Service Type & Counselor (CO):**
    - Complete the type of service client received from County billing activity codes: Type (AS = Assessment, GR = Group, CM = Case Management, TP = Treatment Planning, DC = Discharge, CR = Crisis, MAT = Medication Assisted Treatment, MED = Medication, IND = Ind. Counseling, FT = Family Therapy, PE = Patient Education, PC = Physician Consultation, O = Other).
    - Document the initials of the counselor (CO) that provided the service.
  - (3) **Date Entered:** Complete the date service was entered into SanWITS
  - (4) **Total Minutes:** Complete the total amount of minutes including total service time, total documentation time (if applicable), and total travel time (if applicable).
  - (5) **Funding Source\*:** Check funding source corresponding to service (see Funding Source Key at bottom right corner). NOTE: For any services marked County or Non-Billable, explain on page 2.
    - **DMC = Drug Medi-Cal** - An individual client service that has been delivered and documented as being medically necessary within a treatment episode billable to DMC-ODS, such as OS, IOS, OTP, Residential Services, WM, CM, Recovery Services, etc.
    - **CB = County-Billable** - An individual client service that has been delivered and documented within a treatment episode that is not billable to DMC; examples include:
      - Clients not eligible for Medi-Cal
      - Justice over-ride clients
      - Medically necessary and authorized residential treatment days that exceed DMC-ODS benefits

- Physician consultation
- Assessed No Admit & Assessed Delayed Admit (see Memo – Assessed No Admit and Assess Delayed Admit 10-18 for more details)
- DMC clients with OHC (other healthcare)
- **Please note:** Services that do not meet DMC standards, such as progress notes not completed within timelines, services provided without an active Treatment Plan in place, group services where the group sign-in sheet does not have all required elements, etc. are ***never*** County billable (see Non-Billable section below)
  - **NB = Non-Billable** - An individual client service that has been delivered and documented within a treatment episode that is not DMC or County billable, such as, clinical group with more than 12 clients, progress note completed & signed late, etc.
- **Review Date:** The date tracking form is reviewed at Quality Assurance Review (QAR).
- **QA Reviewer Printed Name:** QAR representative must print name after reviewing tracking form.
- **QA Reviewer Signature:** QAR representative must sign after reviewing tracking form.
- **QAR Determination:** QAR representative must select and check the appropriate box according to the review determination.
- **Comments:** Enter any applicable comments here (e.g. “Client lost MC eligibility for month of March 2019”)

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- **Please explain reason why service is County-Billable or Non-Billable in corresponding number below:** If service is designated as County or Non-Billable on page 1, explain reason(s) here. Please note: if any reason is same for certain consecutive days, you may write the reason once and draw a line through all consecutive days.

**NOTE:** Will be reviewed at QAR.