

## CALAIM PAYMENT REFORM SANWITS CHANGES FOR RELEASE 20.7.14

Changes identified for the following: Encounter, Group Session Notes, Claim Item List, Batch List, and Encounter List.

### Section 1 – Encounter Screen

- The Rendering Staff field – moved to the top of the screen
  - Rendering staff must have taxonomy code as part of user account set up
  - Create encounter by first selecting the rendering staff, then enter the start date of the encounter – Entering these values first, will update the encounter screen (Pre and post 07/01/23)

- Service field – will be filtered based on the allowed services for the rendering staff discipline and the client LOC/PE.

- Documentation Duration and Travel Duration fields – are optional
- Session Duration and Total Duration fields – no longer displayed
- New Total Service Time field – enter **direct** service time with client (do not round up or down)
- # of Service Units/Sessions field – duration-based services calculated based on the Total Service Time field (ex. 1 Unit = 15-minute increment) and is auto-populated

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The screenshot shows the Encounter form with the following fields highlighted in red boxes:

- Rendering Staff: Staff, Rendering
- Note Type: DMC Billable
- Program Name: Outpatient/ODS OS : 2/1/2023 -
- Service: MFT\_Individual Counseling OS
- Start Date: 7/1/2023
- Service Location: Non-residential Substance Abuse Treatment
- Contact Type: Face To Face
- # of Service Units/Sessions: 3

- # of Service Units/Sessions field – unit-based services defaults to “1” and is read only
  - Duration field is optional

The screenshot shows the Encounter form with the following fields highlighted in red boxes:

- Rendering Staff: Staff, Rendering
- Note Type: DMC Billable
- Program Name: Outpatient/ODS OS : 2/1/2023 -
- Service: MFT\_ASAM assessment 30+ min OS
- Start Date: 7/1/2023
- Service Location: Non-residential Substance Abuse Treatment...
- Contact Type: Face To Face
- # of Service Units/Sessions: 1

- Service Location field – dropdown updated (select based on client’s location at time of service)
- Contact Type field – service provided by Telehealth or Phone, contact type must be “Telehealth” or “Phone” whichever is applicable, as well as the Service Location should be
  - “Telehealth provided in patient’s home”
  - “Telehealth provided other than in patients’ home”

**Note:** Encounters with a Start Date pre-7/1/2023 will show both old and new services listed on the Service dropdown. Only select the services with service name (will not contain discipline). The old services will remain on the service dropdown for a period of time to allow for pre- 7/1/23 backdated entries.

The screenshot shows the Encounter form with the Service dropdown menu open. The list of services is as follows:

- Case Management OS
- Contingency Management OS
- Group Counseling OS
- Individual Counseling OS
- LCSW\_ASAM assessment 15-30 min OS
- LCSW\_ASAM assessment 30+ min OS
- LCSW\_ASAM assessment 5-14 min OS
- LCSW\_Care coordination OS
- LCSW\_Clinical Consultation 30 min or more OS
- LCSW\_Contingency Mgmt OS

Annotations in the image:

- Red arrows point to the first four services (Case Management OS, Contingency Management OS, Group Counseling OS, Individual Counseling OS) with the text: "Old services will have only the service name".
- Red arrows point to the last four services (LCSW\_ASAM assessment 15-30 min OS, LCSW\_ASAM assessment 30+ min OS, LCSW\_ASAM assessment 5-14 min OS, LCSW\_Care coordination OS) with the text: "New services will show the discipline before the service name".

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**Section 2 – Group Session Notes Screen**

- Calculate ODS Units field –
  - Defaults to NO and is read only for groups with Start Date of 7/1/23 forward
  - Defaults to YES and is editable for groups with Start Date of pre-7/1/23
    - **Select NO for OTP group counseling on groups with Start Date pre-7/1/23**
- Service field – dropdown will populate **all** group types pre and post 7/1/23
  - User must select groups starting with the “#” sign followed by discipline for groups with start date of 7/1/23 forward
  - User should select groups starting with “\*\*” for groups with start date pre-7/1/23

**Note:** All the new group types preceded by “#” will show on the top of the service list followed by the pre-7/1/23 groups preceded with “\*\*”

**IMPORTANT NOTE: 7/1/23 forward – Issues identified with Group Sessions Note screen**

- **Groups with Start Date of 7/1/23 forward** – Travel Time field is still being required and must have a zero (0) added in order to save it. DO NOT put any time other than a zero (0) as this would be added to the Total Service Time on the individual encounter. **NO travel or documentation duration** should be entered for Group encounters until system is fixed. Providers will be notified by MIS [SUDEHRSupport.HHSA@sdcounty.ca.gov](mailto:SUDEHRSupport.HHSA@sdcounty.ca.gov) when the system has been fixed.
- When creating a “No Show” encounter through the group session notes screen, select “No Show” under the Contact Type on the individual encounter so appropriate fields are greyed out, then finalize encounter

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**Section 3 – Rolled up Claims, Claim Item List, Claim Batch List & Encounter List (For Billing Staff)**

- Rolled-up claims – Claims can be rolled up if the service is provided by the same rendering staff, same day, same client, and same service.
  - Includes both duration-based and unit-based services exception: service code S5000, S5001, H0020, H0019, H0012
  - Totals units will be included to Primary Claim Item
  - Status of Claim will be “Pending Roll-up” OR “Rolled Up”
- Claim Item List – Charge field and Charge column will no longer be visible
  - Including exported list
- Claim Profile - Rate/Unit fields will no longer be visible
- Claim Batch List – Charge column will no longer be visible
  - Including exported list
- Encounter List screen – Balance field and Balance column will no longer be visible
  - Including exported list
- Navigation Pane – the following 12 items below will no longer be visible to users; exception county staff
  - EOB Transaction List Report is being developed in SSRS

