

## **DMC-ODS Outpatient and Residential Documentation Trainings**

- A review of DMC-ODS Services, DMC documentation and billing requirements. Details include required documentation from Admission to Discharge and review of how to write Treatment Plans and Progress Notes.
- Due to limited available seating for the trainings, registration is required, and we are capping the registration to 35 attendees. If you register and become unable to attend, please cancel your registration via WebEx so that others on the waiting list may be able to register.

### ➤ **Outpatient**

- Date: **Friday, January 22, 2021**
- Time: 9:00 a.m. to 12:30 p.m.
- Where: via WebEx – [Please click here to register!](#)

### ➤ **Residential**

- Date: **Friday, February 12, 2021**
- Time: 9:00 a.m. to 12:30 p.m.
- Where: via WebEx – Look for registration information coming soon!



## **Documentation Skill Building Workshops**

- In January, BHS SUD QM will be offering the first skill building workshop in the new year. We will be focusing on Treatment Plans and discussion will include a review of the various types of Treatment Plan forms and instructions.
- Due to limited available seating for the trainings, registration is required, and we are capping the registration to 30 attendees. If you register and become unable to attend, please cancel your registration via WebEx so that others on the waiting list may be able to register.

### ➤ **Treatment Planning**

- Date: **Wednesday, January 20, 2021**
- Time: 1:30 p.m. to 3:30 p.m.
- Where: via WebEx – [Please click here to register!](#)



### **QM Tip of the Month**

DHCS has indicated that the physical examination must be documented under the GOAL section of the treatment plan not the ACTION STEPS. A treatment plan that does not include this as a goal would not be in compliance and would be subject to disallowances.

## **All Behavioral Health Services Providers | COVID-19 Tele-Town Hall**

- Due to public health guidelines, the SUD Treatment Providers meeting will be on hold until further notice.
- In the meantime, all providers are encouraged to attend the All BHS Providers COVID- 19 Tele-Town Halls, which will be scheduled to occur bi-monthly.
- Look for a separate invite/email to be sent prior to the tele-town halls.

### **SUD Provider Quality Improvement Partners (SUD QIP) Meeting**

The QIP is a monthly meeting for all DMC-ODS Providers to get the most up to date information on all things Quality Management, Management Information Systems and Performance Improvement. The expectation is that this meeting is attended by all DMC-ODS contracted providers. The program manager and quality assurance staff monthly attendance is expected as part of your contract. If you are unable to attend, please send a designee to cover.

❖ Special Presentation: Optum will provide a demonstration on the System of Care Application

- Date: **Thursday, January 28, 2021**
- Time: 10:00 a.m. to 11:30 a.m.
- Where: via WebEx – Participation information will be sent by email prior to meeting.

### **New: Timely Access Monitoring**

- Per DHCS Info Notice [18-011](#) and [20-012](#), “Timely access” or “appointment waiting time” means the time from the initial request for behavioral health care services, by a beneficiary or the beneficiary’s treating provider, to the earliest date offered for the appointment for services.”
- Compliance monitoring of timely access for outpatient and OTP providers will begin 2/1/2021 based on SanWITS client data for 1/2021. (At this time, residential programs are not included)
- Compliance monitoring will be a joint effort between the SUDQM team and assigned program COR’s.
- Non-compliance will result in official notification from assigned COR’s, technical assistance by COR’s, and a requirement to submit a Corrective Action Plan within 30 days to assigned COR’s for approval.
- Additional information will be provided at the next QIP meeting.

### **New: Service Verification**

- DHCS requires a mechanism for verifying whether services were actually rendered to clients.
- SUDQM is in the process of implementing this new mechanism.
- Additional information will be provided at the next QIP meeting.

### **Reminder: Emailing Serious Incident Reports (SIRs)**

When emailing Serious Incident Reports (SIRs), programs are to ensure documents are sent via **secure email encryption** in order avoid the risk of a privacy breach.

- For programs that have partnered with the County to establish a secured email connection “tunnel” (TLS), emails will automatically be encrypted in transit and no additional action would need to be taken by the provider.
- If the provider is unable to confirm their program’s participation in TLS email encryption or for programs not participating in TLS encryption, the provider must ensure that their email account is set up with email encryption to send an encrypted email when submitting their SIR document(s).



Providers are encouraged to reach out to their Program Manager and/or their Program IT for any questions regarding their participation in County TLS Email Encryption or email encryption options.

### **Update: Ongoing Optum Cleanup**

- QM is in the process of updating several tabs on the Optum site.
- This involves removing/archiving old or outdated forms, communication, documentation.
- Tabs will have a document outlining items removed and archived.

### **Update: Psychotherapy in the DMC-ODS**

- As a follow-up to last month's Quality Improvement Partners Meeting, DHCS has clarified that psychotherapy is not an included service code in the DMC-ODS.
- While individual or group counseling services provided by LPHAs may have elements of psychotherapy and remain in the scope of practice of the provider, clients in need of ongoing psychotherapy should be referred to the appropriate level of mental health services.

### **Reminder: Board of Behavioral Sciences (BBS) requirement for telehealth services**

- **LPHAs:** The BBS requires that all licensed or license-eligible/registered clinicians must indicate they have verbally confirmed client's full name and address of present location at the beginning of each telehealth session.
- This needs to be documented in each progress note for services delivered by licensed or license-eligible/registered clinicians.
- At this time this does not apply to SUD counselors; however, SUD counselors may choose to follow this guideline as part of a program integrity policy.

### **Reminder: Program Reporting of Fraud, Waste and Abuse**

- Concerns about ethical, legal, and billing issues, (or of suspected incidents of fraud, waste and/or abuse) should be reported directly to:
  - The HHS Agency and Compliance Office (abbreviated ACO) by phone at 619-338-2807, or by email at [Compliance.HHSA@sdcounty.ca.gov](mailto:Compliance.HHSA@sdcounty.ca.gov).
  - Or report to the Compliance Hotline at 866-549-0004
- (NEW) In addition, any potential fraud, waste, or abuse shall be reported directly to DHCS' State Medicaid Fraud Control Unit. Reporting can be done by phone, online form, email or by mail.
  - 1-800-822-6222
  - [fraud@dhcs.ca.gov](mailto:fraud@dhcs.ca.gov)
  - [Online form](#)
  - Medi-Cal Fraud Complaint – Intake Unit  
Audits and Investigations  
P.O. Box 997413, MS 2500  
Sacramento, CA 95899-7413
- All reporting shall include contacting your program COR immediately, as well as the SUD QM team at [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov) to report any of these same concerns, or suspected incidents of fraud, waste, and/or abuse.
- SUDPOH and Program Integrity webinar is in the process of being updated to include the new reporting requirement.



### **Reminder: Due Date Timeline Tip Sheets**

- Tip sheets for Due Date Timelines are posted on the Optum site under the Toolbox tab.
- For timelines during a non-leap year, the "standard" tip sheet should be used.
- [Outpatient Due Date Timeline – Standard Year](#)
- [Residential Due Date Timeline – Standard Year](#)

### **Reminder: Signatures during the Public Health Emergency**

- Staff and provider signatures during the Public Health Emergency are still required and must be completed within the standard timelines for all documentation.
- Signatures can be a “wet” signature or a digital signature; however, a copy/pasted scan of a signature is not considered a digital signature.
- If the staff that provided created the documentation and/or provided the service are unable to sign the documentation, the following guideline should be followed:
  - ✓ The Counselor/LPHA should document in the narrative of the note that he or she is unable to sign and the reason.
  - ✓ If an LPHA who is the Counselor/LPHA’s supervisor or the program Director has access to the note to print, sign, date, and enter into the client record, he or she may do so and should document “signing on behalf of [Counselor/LPHA name]”.
  - ✓ In this situation, the Counselor/LPHA who provided the service should document in the note that the LPHA Supervisor/Program Director will sign on his/her behalf.”
- Documentation that is not signed, not signed within timelines, or does not follow this guideline is at risk for being disallowed or out of compliance.
- Please refer to the [BHS COVID-19 FAQ](#) for continued guidance during the Public Health Emergency.



### **All Programs:**

#### **CalOMS**

- In the new SanWITS release (version 20.7.1) updated on December 15<sup>th</sup>, “Not Applicable” became visible under the Primary and Secondary Drug Type for Admission, Annual Update, and Discharge records. **This is NOT an acceptable CalOMS value and the State will reject it.** Please ***DO NOT select Not Applicable.***
- The option will be removed from SanWITS in an upcoming release.
- **Data Entry Standards** - Refer to Memo dated 2/11/20 available on [Optum](#)
- Why this is important: CalOMS data must be submitted to the State in a timely manner. Please make sure you are entering CalOMS Admission, Annual Update, and Discharge records on time to avoid late submissions and non-compliance.

#### **OTP Providers Only**

- For Methadone dosing, the system is allowing the encounter to be released with the end date blank. This could result in a discrepancy between the # of units and the start/end date of the encounter.
- Why this is important – because the number of units must match the number of days between the start and end date on the service.
- As a reminder, the ***end date must be entered for all Methadone Dosing encounters*** to prevent your claims from being denied.

#### **Residential Providers**

- Residential Bed Day encounters **should be created** through the Census.
- Make sure you are selecting all the clients that received the required service for the specific residential bed day.
  - For guidelines/requirements contact [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)
- The encounter note type is pre-populating to Bed Management Census Note and no longer needs to be changed unless the service is disallowed.

### **Outpatient and OTP Group Counseling**

- All group counseling should be entered in SanWITS under the Group module.
- **Outpatient group services** – Calculate ODS units field should always be marked **YES**
  - Why this is important: this field tells the system to use a unique ODS calculation, and if not appropriately identified will result in overpayment and fraud.
- **OTP group services** – Calculate ODS units field should always be marked **NO**
  - Why this is important: this field tells the system to use a unique ODS calculation that does not apply to OTP/NPT providers and if not appropriately marked can result in underpayment.

### **Treatment Team**

- Programs should be entering the TX Team in SanWITS for each client to include at least the Primary Counselor, Case Manager, QA Staff, LPHA, etc.
- Visit the Optum website at [Optum San Diego](#) to search for the “Intro to Admin Functions Training Manual” found under the Training-SanWITS tab for instructions on how to enter the TX Team in SanWITS.
- The new clinical dashboard can only be accessed by members of the Treatment Team.

### **Reminder: DATAR**

- DATAR reporting must be completed between the 1<sup>st</sup> – 7<sup>th</sup> of the month for the previous month.
- DATAR submissions that have not been completed by the 7<sup>th</sup> of the month are out of compliance.
- Each Provider **should have at least two staff members** responsible for submitting DATAR to avoid noncompliance (occasions when the primary staff is not available such as vacations and leaves).
- Contact the SUD Support desk at [SUD MIS Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov) for DATAR questions and access.

### **EHR Readiness**

- Implementation of SanWITS clinical documentation has begun – Adult Initial Level of Care Assessment (ILOC), Adolescent ILOC, Recommended Level of Care (LOC), Parent/Guardian, Risk and Safety Assessment, Discharge Summary, and Diagnostic Determination Note (DDN).
- Individual staff will gain access upon training completion.
- Program managers are recommended to attend training first, followed by those with prior SanWITS experience and/or strong computer skills.
- New hires should be oriented to their program prior to attending training.
- Exposure to documentation training is recommended to take place in advance of SanWITS training.
- Only clinical staff will have access to assessments, treatment plans, and progress notes. Documenting directly into SanWITS is the most efficient method.
- Computer hardware needs should be evaluated.
- **Basic computer skill proficiencies will be important improving training outcomes, entering data and navigation of the system** – See **Basic Computer Skill Quiz** [Basic Computer Skills Quiz 2020.12.11.pdf](#)
- On the date of training, set yourself up for success!





### Important Reminder: SanWITS Access, Modification, and Terminations for SanWITS

- **Training** – Due to the large volume of forms being processed, staff will be **excluded** from training if forms are not fully completed, staff signature, reviewed and signed by supervisor confirming accuracy, and submitted 7 days prior to training.
- **Routine User Termination** – In most cases, staff employment is terminated in a routine way in which the employee gives an advanced notice. Within one business day of employee termination notice, the program manager shall fax to the SUD MIS Unit (855) 975-4724 or scan and email to [SUD\\_MIS\\_Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov) a completed SanWITS User Modification or Termination Form with the termination date (*will be a future date*). The SUD MIS Unit will enter the staff expiration date in SanWITS which will inactivate the staff account at the time of termination. The user will also be added to the terminated staff log.
- **Quick User Termination** – In some situations, a staff person’s employment may be terminated immediately. In this case, the program manager must immediately call the SUD MIS Unit at (619) 584-5040 to request the staff account be inactivated immediately. Within one business day, the program manager shall fax a completed SanWITS User Modification and Termination Form to the SUD MIS Unit (855) 975-4724 or scan and email to [SUD\\_MIS\\_Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov)



### Additional Reminders:

1. There are updated (10-9-20) versions of the **New User Form** and **Modification/Termination Form** available on Optum’s website under the SanWITS tab, and also on RegPack. Link to Optum’s Website: [Optum San Diego](https://www.optum.com).

#### Notable changes:

- a. New fields to capture date of birth (DOB) and the last 4 of Social Security Number (SSN).
- b. Updated boxes to select roles for *Counselor*, *LPHA*, and *QA*. (see 2<sup>nd</sup> screenshot)

**SECTION I. USER INFORMATION**

First Name	Middle Name	Last Name
Date of Birth	Last 4 of SSN	Gender

**SECTION III. USER FUNCTION AND ROLES**

Please select the job function(s) associated with the access you will have in SanWITS.

<p><b>Staff - Data Entry</b>  <i>(IAF) training required.</i>          Admission, ASAM Profile, Client          Discharge, Intake, Notes,          Outcomes, Cross-Agency          and Notes.</p> <p><b>Staff - Encounters</b>  <i>required.</i>          Includes: TxEncounter, Release          Management, and Census.</p> <p>Includes: TxEncounter.</p>	<p><input type="checkbox"/> <b>Billing Staff - Claim Batching</b>          (Please contact <a href="mailto:ADSBillingUnit.HHSA@sdcounty.ca.gov">ADSBillingUnit.HHSA@sdcounty.ca.gov</a>          to schedule Billing Training after completing Intro to          Admin Functions [IAF] and Encounters training.)</p> <p><input type="checkbox"/> <b>LPHA</b> (Appropriate credentials required)</p> <p><input type="checkbox"/> <b>Counselor</b> (Appropriate credentials required)</p> <p><input type="checkbox"/> <b>QA</b></p>
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2. Reminder – Please check the *Administrative Staff – Data Entry* and/or *Administrative Staff – Encounters* boxes on the SanWITS user forms if you want your staff to have those roles after they complete training.

**SECTION III. USER FUNCTION AND ROLES**

**Job Function(s):** Please select the job function(s) associated with the access you will have in SanWITS.

<input checked="" type="checkbox"/> <b>Administrative Staff - Data Entry</b> <i>Intro to Admin Functions (IAF) training required.</i> Access includes: Admission, ASAM Profile, Client Diagnosis, Client Profile, Discharge, Intake, Non-Treatment Team Access, Outcomes, Cross-Agency Waitlist Management, and Notes.	<input type="checkbox"/> <b>Billing Staff - Claim Batching</b> (Please contact <a href="mailto:ADSBillingUnit.HHSA@sdcounty.ca.gov">ADSBillingUnit.HHSA@sdcounty.ca.gov</a> to schedule Billing Training after completing Intro to Admin Functions [IAF] and Encounters training.)
<input checked="" type="checkbox"/> <b>Administrative Staff - Encounters</b> <i>IAF and Encounters required.</i> Residential access includes: TxEncounter, Release to Billing, Authorization, Bed Management, and Census.  Outpatient/OTP access includes: TxEncounter, Release to Billing, and Group Module.	<input type="checkbox"/> <b>LPHA</b> (Appropriate credentials required)  <input type="checkbox"/> <b>Counselor</b> (Appropriate credentials required)  <input type="checkbox"/> <b>QA</b>

3. Reminder – Rendering staff must complete the below section with the NPI number, credential type, and credential number.

Please make sure this information is accurate for California and up to date.

**SECTION II. CLINICAL STAFF**

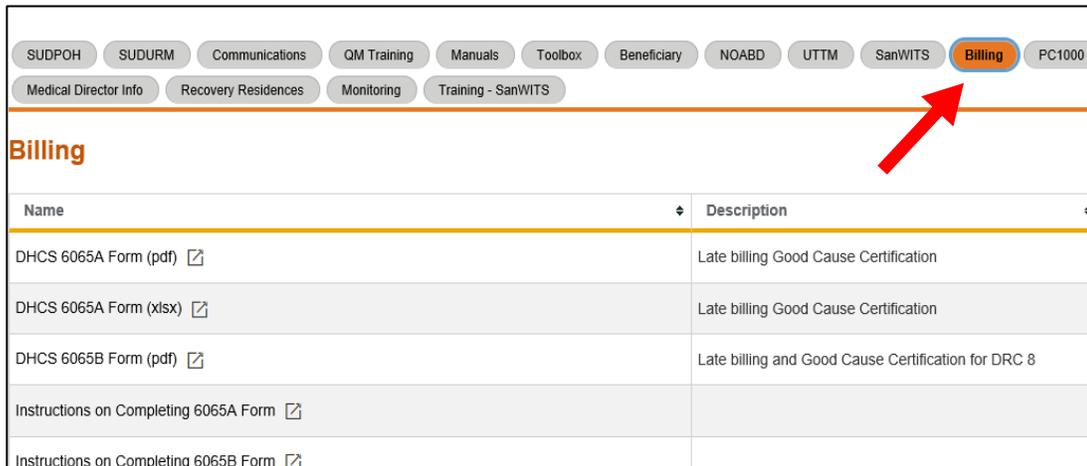
Rendering Staff National Provider ID	Taxonomy #	DEA Number (Prescribing MD)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Professional Credential/License	License #	Issue Date
Select Additional Credential/License ▾	<input type="text"/>	<input type="text"/>
Additional Credential/License	License #	Issue Date
Select Additional Credential/License ▾	<input type="text"/>	<input type="text"/>

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4. **SSRS User** role is no longer available.
- In an effort to standardize reporting, the **SSRS User** role is no longer available. On 8/10/20, this role was automatically replaced with the **SSRS Reader** role. Users can still request reports by completing the SanWITS Report Request Form and returning it to SUD MIS Support at [SUD\\_MIS\\_Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov).
  - Users can access a tip sheet “**SSRS – How to Run Reports and Save to Excel File**” on the Optum website with instructions on how to access and generate a report template removing the need for SSRS formal trainings.
  - To request a report, simply fill out the SanWITS Report Request Form, attached here or available on Optum’s website under the “SanWITS” tab and return to: [SUD\\_MIS\\_Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov).
  - **Link to SanWITS Report Request Form** (Select SanWITS tab and scroll down to form.)  
[SanWITS Report Request Form](#)

## Update: Good Cause Certification/Late Billing Forms

- The Good Cause Certification/late billing forms and instructions are now available on the Optum website, on the DMC-ODS page under the “Billing” tab.



SUDPOH	SUDURM	Communications	QM Training	Manuals	Toolbox	Beneficiary	NOABD	UTTM	SanWITS	<b>Billing</b>	PC1000
Medical Director Info	Recovery Residences	Monitoring	Training - SanWITS								

Name	Description
DHCS 6065A Form (pdf) 	Late billing Good Cause Certification
DHCS 6065A Form (xlsx) 	Late billing Good Cause Certification
DHCS 6065B Form (pdf) 	Late billing and Good Cause Certification for DRC 8
Instructions on Completing 6065A Form 	
Instructions on Completing 6065B Form 	

## Billing Unit - SanWITS Billing Classes

- As most of us are still adjusting to remote work, we’re also learning new ways to continue servicing our customers. The SUD Billing Unit will continue conducting the billing training online.
- Our team will send an email to all programs to inquire what web conferencing platform or application you use for audio and/or video conferencing or training. Currently, the Billing Unit uses the Microsoft Teams application.
- Also, to schedule your billing training or if you have billing questions, please call our main line: 619-338-2584. You can also email us at [ADSBillingUnit.HHSA@sdcounty.ca.gov](mailto:ADSBillingUnit.HHSA@sdcounty.ca.gov).
- Prerequisite required: SanWITS Intro to Admin Functions training and one of the following encounter trainings – 1) Residential -Bed Management & Encounters training, or 2) Outpatient/OTP Group Module & Encounters training



## SanWITS Quarterly Users Group Meeting for Outpatient Providers – Jan 2021

- Next meeting: Monday, Jan 25, 2021, at 9:00 a.m. – 11:00 a.m. (Outpatient Providers Only)
- RSVP please, WebEx invite will be sent
- At least one representative from each facility is highly recommended
- Note: Meetings are held monthly, on the 3<sup>rd</sup> Monday, and are specific to modality (e.g. Outpatient, Residential, OTP)
  - Outpatient programs will meet – Apr, Jul, Oct, Jan
  - Residential programs will meet – May, Aug, Nov, Feb
  - OTP programs will meet – Jun, Sep, Dec, Mar
- If you have any questions or need assistance with SanWITS please notify the SUD Support desk at [SUD MIS Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov)

## Communication

- Billing questions? Contact: [ADSBillingUnit.HHSA@sdcounty.ca.gov](mailto:ADSBillingUnit.HHSA@sdcounty.ca.gov)
- SanWITS questions? Contact: [SUD MIS Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov)
- DMC-ODS Standards/SUDPOH/SUDURM questions? Contact: [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)

### **SanWITS Virtual Trainings Provided**

- Register online with RegPacks at: [www.regpacks.com/dmc-ods](http://www.regpacks.com/dmc-ods)
- Registration will close 7 days prior to the scheduled class date in order to allow time for individual staff account setups and other preparation needed.
- Attendees for Virtual Training will receive an email on the morning of training between 8:30 A.M. – 8:45 A.M.
  - Trainer email with training materials, resources, and specific instructions for virtual class
  - If staff do not receive emails by 9:00 A.M., email [SanWITSTraining.HHSA@sdcounty.ca.gov](mailto:SanWITSTraining.HHSA@sdcounty.ca.gov) to get the issue resolved.
- Types of Training Classes:
  - SanWITS – Intro to Admin Functions – SanWITS functions that are applicable to All program types
  - Residential Facilities - Bed Management & Encounter Training
  - Outpatient /OTP Facilities – Group Module & Encounters Training
- **All required forms are located on the “Downloadable Forms” tab and must be fully completed, signed by the staff needing training, then reviewed and signed by the supervisor and returned to SUD Support at [SUD\\_MIS\\_Support.HHSA@sdcounty.ca.gov](mailto:SUD_MIS_Support.HHSA@sdcounty.ca.gov) at least 7 days prior to scheduled training. If the 3 forms are not fully completed and submitted, you will not be able to attend training regardless of receiving training confirmation. All credentials and licenses will be verified with the appropriate entities for SanWITS access.**
- Upon completion of training, competency must be shown in order to gain access to the system. If competency is not achieved, another training will be required before access is given.
- **Staff are highly recommended to read the training packet thoroughly before entering information into the Live environment**
- If you are unable to attend class, please cancel the registration as soon as possible.

### **Reminder: COVID-19 | Behavioral Health Services (BHS) Provider Resources**

- Behavioral Health Services (BHS) is committed to keeping our providers updated with emerging information related to the Coronavirus Disease 2019 (COVID-19) response.
- Follow the link to access the [BHS Provider Resources Page](#) which is updated regularly with the most recent communications and resources that have been sent to BHS providers.

### **Reminder: DHCS COVID-19 Response Resources**

The California Department of Health Care Services (DHCS) has frequently updated resources regarding provision of Behavioral Health Services during the COVID-19 crisis. For more information, visit the DHCS COVID-19 Response page at: <https://www.dhcs.ca.gov/Pages/DHCS-COVID%E2%80%9119-response.aspx>

### **Reminder: For general information on COVID-19**

Including the current case count in San Diego County, preparedness and response resources, and links to information from the California Department of Public Health (CDPH), Centers for Disease Control and Prevention (CDC), and the World Health Organization (WHO), please visit the [County of San Diego COVID-19 webpage](#).

For local information and daily updates on COVID-19, please visit [www.coronavirus-sd.com](http://www.coronavirus-sd.com). To receive updates via text, send **COSD COVID19** to 468-311.

Coronavirus Disease 2019  
**COVID-19**

**Is this information filtering down to your counselors, LPHAs, and administrative staff?  
Please share the UTTM – SUD Provider Edition with your staff and keep them *Up to the Minute!***

Send all personnel contact updates to [QIMatters.hhsa@sdcounty.ca.gov](mailto:QIMatters.hhsa@sdcounty.ca.gov)