

**Healthy San Diego / Community Health Group**  
**Physical And Mental Health**  
**Coordination Form**  
**Guidelines**

Specialty Mental Health Services are described in Title 22, California Code of Regulations (CCR), Section 51341. All Specialty Mental Health Services and Fee-For-Service Medi-Cal (FFS/MC) mental health services are excluded from Medi-Cal Managed Care Plan coverage responsibilities under its Medi-Cal contracts with the California Department of Health Services ("DHS"). Other than the mental health services rendered by the Health Plan contracting primary care physician ("PCP"), this exclusion includes outpatient and inpatient mental health services.

Health Plan contracting PCPs provide outpatient mental health services, within the scope of their practice, and coordinate referrals for member/beneficiary's requiring specialty and inpatient mental health services. San Diego County is required by law to provide access to specialty mental health services for Medi-Cal managed care Members/beneficiaries, consistent with access provided to other Medi-Cal beneficiaries.

Medi-Cal Health Plan Members/beneficiaries receiving specialty mental health services remain enrolled in Health Plan medical benefits plan. Health Plan providers will coordinate all services identified as medically necessary, including referral of Members/beneficiaries requiring specialty mental health services to the appropriate county program(s)/FFS/MC provider.

The Physical Health/Mental Health Coordination form provides a communication system for the coordination of care between physical health physicians and mental health providers. The form is two-sided and can be initiated by either the PCP or the mental health provider. The Coordination form allows for minimal information exchange between providers, and allows for contact to discuss essential medical information impacting treatment.

The Healthy San Diego Physical and Mental Health Care Coordination Form for Medi-Cal Managed Care and CMS Programs is available at [www.ubhpublicsector.com](http://www.ubhpublicsector.com).

#### Attachments

Physical Health/Mental Health Coordination form

#### Member Responsibilities

Members/beneficiaries are identified for mental health services by self-referral, family referral or by the PCP, during the normal course of practice, and by specialists during the course of consultation and treatment. Specialty mental health services may be accessed through the County of San Diego Mental Health Plan Access and Crisis Line toll free number at (800) 479-3339- or by direct referral to a county mental health provider.

## Primary Care Physicians Responsibilities

### A. Primary Care Physicians Referrals

Health Plan PCP's are responsible to act as the primary care case manager for the member, and make referrals to medical specialists, as necessary.

1. The PCP is responsible for providing outpatient mental health services that are within his or her scope of practice. When the member's mental health needs require specialty mental health service(s), the PCP refers the member to the Mental Health Plan for appropriate referral, assessment and treatment.
2. The PCP will refer to Specialty Mental Health Services on the basis of objective and subjective evaluation of the member/beneficiary's medical history, psychosocial history, current state of health, and any request for such services from either the member or the member/beneficiary's family.
3. Once the determination has been made to refer the member for mental health services to the Mental Health Plan, the member/beneficiary may self refer; or the PCP may make the referral to the Mental Health Plan access line directly.
4. The PCP makes appropriate documentation of the mental health condition in the member/beneficiary's medical record.
5. The PCP makes available to the specialty mental health provider medical records and documentation relating to the diagnosis and care of the mental health condition, according to Health Plan policy and applicable laws and regulations.

### B. Healthy San Diego (HSD) Care Coordination Form

1. PCP initiates the form, by filling out the PCP section and giving the form to the member/beneficiary. The member/beneficiary is instructed to call the Mental Health Plan Access and Crisis Line at (800) 479-3339- for a referral to a mental health provider. The member/beneficiary will then take the form to their appointment with the mental health provider who will fill out the mental health provider section, the release of information and fax the completed form back to the PCP.
2. The Mental Health Plan providers will have copies of the HSD Care Coordination Form to initiate. Each Health Plan's contact telephone number is listed on the HSD Care Coordination Form. If the member/beneficiary doesn't remember the form and the mental health provider finds out the member/beneficiary is in a Health Plan, the mental health provider will fill out the appropriate mental health section and forward the form to the PCP, with the member/beneficiary's written consent.

## Specialty Mental Health Provider Responsibilities

1. When the member/beneficiary's physical health needs require physical health services, the Mental Health Plan provider refers the member/beneficiary to the physical health plan PCP for appropriate referral assessment and treatment.
2. Once the determination has been made to refer the member/beneficiary for physical health services to the Physical Health Plan or PCP, the member/beneficiary is instructed to make an appointment with their PCP or contact the Health Plan Member Services Department for assistance.
3. The County Mental Health Plan provider documents the physical health condition and the referral instruction in the member/beneficiary medical record.
4. If the member/beneficiary provides written authorization to release Mental Health Plan information, the Mental Health Plan provider will make available to the physical health PCP the appropriate medical records and documentation relating to the diagnosis and care of the physical health condition. Mental health information will be shared according to the County Mental Health Plan policy and applicable laws and regulation.

## Confidentiality

- A. Confidential member/beneficiary information includes, but is not limited to, any individually identifiable information about an member/beneficiary's character, habits, avocation, occupation, finances, credit, reputation, health, medical history, mental or physical condition or treatment. Confidential member/beneficiary information may be learned in either a casual or formal setting including conversation, computer screen data, faxes, or any written form.
- B. Discussion of member/beneficiary information should be limited to that which is necessary to perform the duties of the job. Reports from specialty mental health services and consultations are placed in the member/beneficiary's medical record at the PCP's office. Mental health services are considered confidential and sensitive. Written follow-up consultation the PCP receives from the specialist or therapist may be placed in a confidential envelope section of the member/beneficiary's medical record.
- C. Providers are required to maintain all mental health records in accordance with applicable laws and regulations.

## Please Note:

Each Health Plan may utilize these guidelines to develop their own policies and procedures pertaining to consultations, identification of and placement of mental health records in the medical record or module record.