



San Francisco Health Network
Behavioral Health Services

San Francisco Department of Public Health

Updated Avatar CaAIM UOS Reports

January 16, 2024



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What is Happening?

- The UOS Reports have been updated to reflect CalAIM changes
- The following reports have been created:
 - CalAIM MH UOS Detail Report EXCEL
 - CalAIM SUD Outpatient UOS Detail Report EXCEL
 - CalAIM SUD NTP UOS Detail Report EXCEL
- The updated reports are designed to be exported to Excel
- This comprehensive report can serve multiple purposes
 - Identify Billing Errors
 - Calculate Staff Summary
 - Calculate Program Summary



What is Happening (Continued)?

- The following reports continue to be available for cost reporting and reconciliation of FY22-23 and prior:
 - MH Units of Summary Report
 - SUD Outpatient UOS Summary Report
 - SUD NTP UOS Summary Report
- The following reports will be retired:
 - Staff Activity Reports
 - Service Billing Errors by Program Report



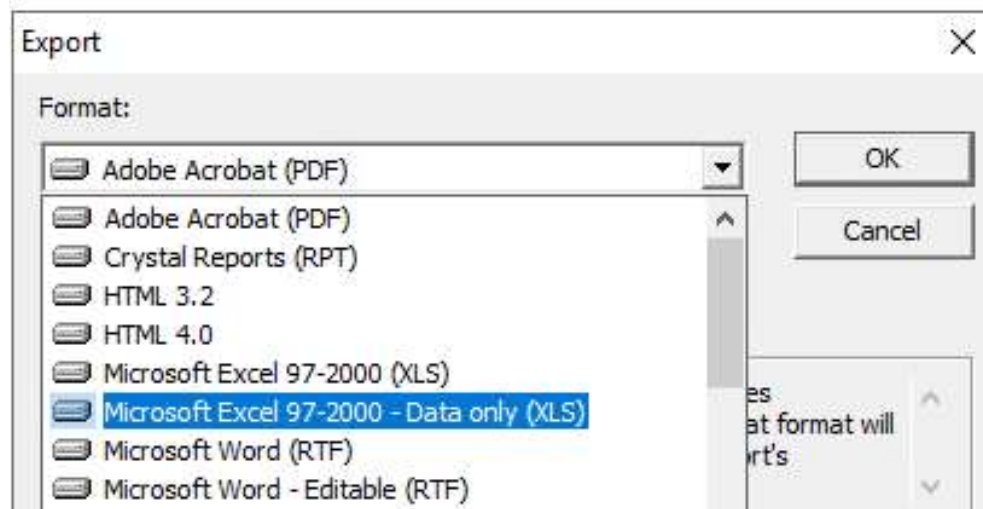
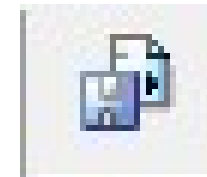
What counts and does not count?

Counts	Does not count
Direct Billable Service Time	Travel Time
• That meet the minimum duration	Documentation Time
• And do not exceed the maximum	NM Codes
	LCK Codes
	ADM Codes
	Indirect Services
	Services that do not meet the minimum
	Services that exceed the maximum



Instructions

1. In the Search forms and data box, type: CalAIM xx UOS Report (where xx reflects your modality: MH, SUD Outpatient, or SUD NTP)
2. Select your program
3. Enter Start Date and End Date
4. Click Process
5. Once the report loads, click the floppy disk icon to export
6. Select Microsoft Excel 97-2000 – Data only (this will export the report to Excel)





What is the Minimum Threshold?

You are responsible for reviewing the appropriate Crosswalk for specific details.

- CalAIM SMHS BHS Provider Crosswalk
- CalAIM DMC ODS BHS Provider Crosswalk

The links to the Crosswalks are on page 25 of this PowerPoint.

Local Code	Description	CPT code	Minimum	Notes
ASMT1	Psychiatric Diagnostic Eval, 15 minutes	90791	8	This code is defined in 15 minute increments so you must exceed the halfway point (in this case 8)
90839	Psychotherapy for Crisis, First 30-74 Minutes	90839	30	This code is defined from 30 minutes to 74 minutes, so in this case, you must meet at least 30 minutes to bill this code



What is the Maximum Allowed?

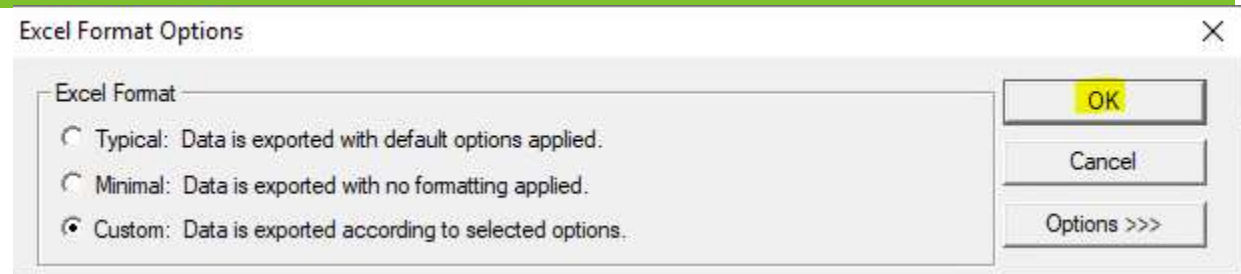
You are responsible for reviewing the appropriate Crosswalk for specific details.

- Familiarize yourself with the codes in the crosswalk applicable to you
 - In some cases, codes are defined with a range of minutes
 - In some cases, you need to add the G2212 Add On Code to bill for time beyond the maximum on the primary code
 - Also note that there are maximum units that can be billed per day

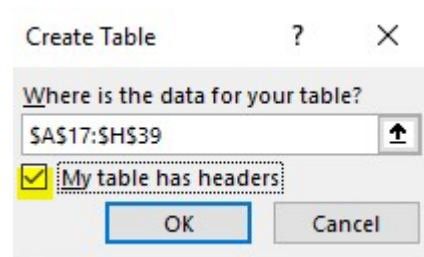
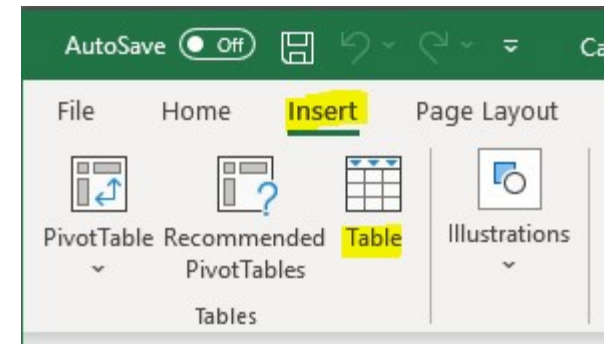
Local Code	Description	CPT code	Maximum Duration	Maximum Unit	Notes
90839	Psychotherapy for Crisis, First 30-74 Minutes	90839	74 minutes	1	Use 90840 for each additional 30 minutes
GRPTPY	Group Psychotherapy, 15 Minutes	90853	15 minutes	1	Use G2212 to bill for time that exceeds 15 minutes
T1017	Targeted Case Management, Each 15 Minutes	T1017	1440 minutes (15 minute increments x 96 max units)	96	In this case, you cannot bill beyond the max of 1440 minutes



Instructions Continued



7. Click OK
8. Select where you want to save the document
9. Name your document: we recommend the name of the program and the date range
10. Open the Excel document that you just named and saved
11. Click the word "Insert" at the top of the page
12. Then select "Table"
13. A pop up box appears, it should select the whole table
14. Make sure that the box is checked for "My Table has headers"





Reviewing the columns

	A	B	C	D	E	F	G	H	I	J
1	ProgCode	ProgramName	ClientID	ClientName	Epi#	SvcDate	SvcCode	ServiceDescription	StaffID	PractitionerName
2	38723	CTNB Outpatient			1	7/3/2023	EEML	Existing Client E/M Med		
3	38723	CTNB Outpatient			1	7/5/2023	90837	Psychotherapy 53+ Min		

	PractitionerCategoryValue	Prim StaffDur	F2F	Docu	Travel
	LCSW		37	37	12
	LCSW		34	34	6
	LCSW		0	57	51
	PharmD		10	10	5

P	Q	R	S	T	U	V	W	X	Y
CoStdID	CoS_Name	CoS_Lic	CoStdDur	CoS_F2F	CoS_Docu	CoS_Travel	2CoStdID	2CoStdDur	#Grp
			0.00	0	0	0			0
			0.00	0	0	0			0
			0.00	0	0	0			0
			0.00	0	0	0			0
			0.00	0	0	0			0
			0.00	0	0	0			0

Z	AA	AB	AC	AD	AE
location_code	SvcLocation	SvcCost	DataEntry	mode	UOS
53	Community Ment	258.28	8/9/2023	15	2.00
53	Community Ment	258.27	1/3/2024	15	1.00
53	Community Ment	0	7/27/2023	15	0.00
53	Community Ment	237.52	8/4/2023	15	1.00
53	Community Ment	246.74	8/8/2023	15	1.00
53	Community Ment	0	8/16/2023	15	0.00
53	Community Ment	246.74	8/21/2023	15	1.00
98	Phone Only-Tele	97.16	8/21/2023	15	1.00



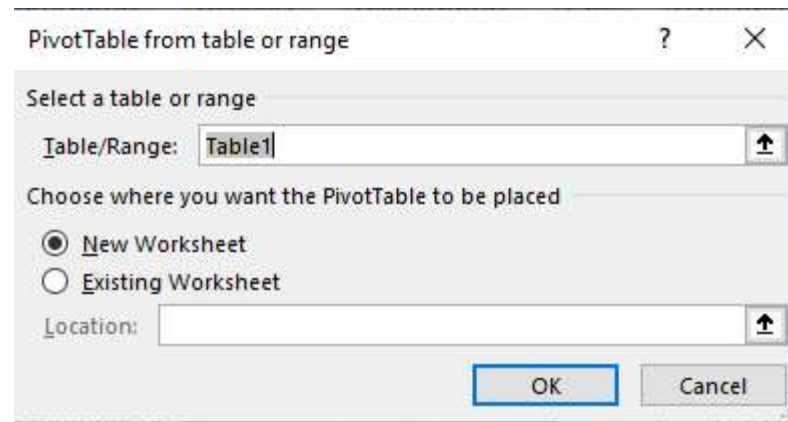
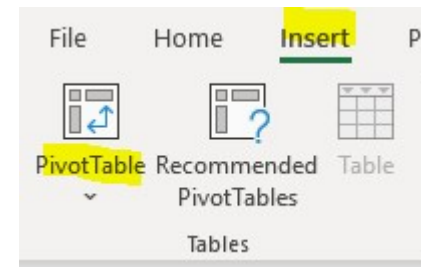
Using the report to find Billing Errors

1. The most common errors have to do with minimums and maximums
2. Use the report to identify billing errors
 - a. Scroll to Column X “SvcCost”
 - b. Click the down arrow
 - c. Uncheck “Select All”
 - d. Only check “0”
 - e. If you further want to limit your results, scroll to Column G “SvcCode”
 - f. Uncheck the following (these services are not billable and always show a SvcCost of zero)
 - a. ADM00
 - b. ADM99
 - c. Any NM codes
 - d. Any LCK codes
 - g. You will need to use the resulting list along with the CalAIM Provider Crosswalk to find out what the minimum and maximum durations



Instructions for Using the report to calculate Primary Staff Summary

1. Make sure you have removed any filters by ensuring that “select all” on all columns
2. Select the entire table by using Ctrl “A”
3. Click “Insert” and then select “Pivot Table
4. Save your table as a “New Worksheet”





Continued Instructions for Using the report to calculate Primary Staff Summary

The screenshot shows an Excel spreadsheet with a PivotTable layout. The spreadsheet has columns A through J and rows 1 through 22. The PivotTable area is defined by a blue border and contains the following text:

- Row 1: Drop Report Filter Fields Here
- Row 3: Drop Column Fields Here
- Column A (rows 4-16): Drop Row Fields Here
- Center: Drop Value Fields Here

The PivotTable Fields task pane is visible on the right side of the spreadsheet. It includes the following elements:

- Tab: PivotTable Fields
- Choose fields to add to report: Search (with a magnifying glass icon)
- Fields list: ProgCode, ProgramName (with checkboxes)
- Drag fields between areas below:
- Filters: (empty box)
- Columns: (empty box)
- Rows: (empty box)
- Values: (empty box)
- Defer Layout Update: (checkbox)
- Update: (button)

A new sheet "Sheet2" is created.
Sheet1 is your original detail data



Continued Instructions for Using the report to calculate Primary Staff Summary

PivotTable Fields

Choose fields to add to report:

Search

- ☐ SvcDate
- ☒ SvcCode
- ☒ ServiceDescription
- ☒ StaffID
- ☒ PractitionerName
- ☒ PrimStaffDur
- ☐ F2F
- ☐ Resu

Drag fields between areas below:

Filters	Columns

Rows	Values
SvcCode	Sum of PrimStaffDur
ServiceDescription	
StaffID	

Check the following boxes in this section:

1. SvcCode
2. ServiceDescription
3. StaffID
4. PractitionerName
5. PrimStaffDur

6. The selected fields will automatically sort themselves out into the correct boxes



Continued Instructions for Using the report to calculate Primary Staff Summary

Re-order the items in the "Row" box:

1. StaffID
2. PractitionerName
3. SvcCode
4. ServiceDescription
5. PrimStaffDur

It will be sorted so that you see the activities
For each staff person

The screenshot shows the 'PivotTable Fields' task pane. At the top, it says 'Choose fields to add to report:' with a search bar and a settings icon. Below the search bar, 'ProgCode' is listed with an unchecked checkbox. A dashed line separates this from the main area, which says 'Drag fields between areas below:'. There are four main areas: 'Filters' (empty), 'Columns' (empty), 'Rows' (highlighted in yellow), and 'Values'. The 'Rows' area contains a list of fields: 'StaffID', 'PractitionerName', 'SvcCode', and 'ServiceDescription', each with a dropdown arrow and a small up/down arrow. The 'Values' area contains 'Sum of PrimStaffDur' with a dropdown arrow.



Continued Instructions for Using the report to calculate Primary Staff Summary

You now see a listing of services for each staff member

[-] [REDACTED]	[-] [REDACTED]	[-] 90834	Psychotherapy 38-52 Minutes FTF	148
		90834 Total		148
		[-] 90837	Psychotherapy 53+ Minutes FTF	119
		90837 Total		119
		[-] ADM99	ADMIN NOTE NOT BILLED	0
		ADM99 Total		0
		[-] T1017	CASE MANAGEMENT BROKERAGE	81
		T1017 Total		81
[REDACTED] Total				348
[REDACTED] Total				348
[-] [REDACTED]	[-] [REDACTED]	[-] 90834	Psychotherapy 38-52 Minutes FTF	39
		90834 Total		39
		[-] 90837	Psychotherapy 53+ Minutes FTF	240
		90837 Total		240
[REDACTED] Total				279
[REDACTED] Total				279



Continued Instructions for Using the report to calculate Primary Staff Summary

The summary of all the durations listed for Primary Staff is listed as the “Grand Total” at the bottom of the report

5	(blank)	(blank)	(blank)	(blank)	
6			(blank) Total		
7		(blank) Total			
8	(blank) Total				
9	Grand Total				3291

Primary Staff Summary

Sheet3

...

+

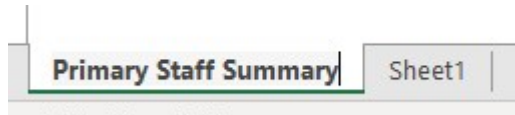
:

◀

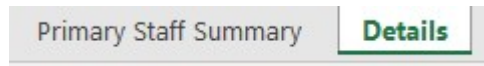


Continued Instructions for Using the report to calculate Primary Staff Summary

1. It is a good idea to rename your tabs in order to keep track of your data
2. Right click on “Sheet2” and type “Primary Staff Summary”



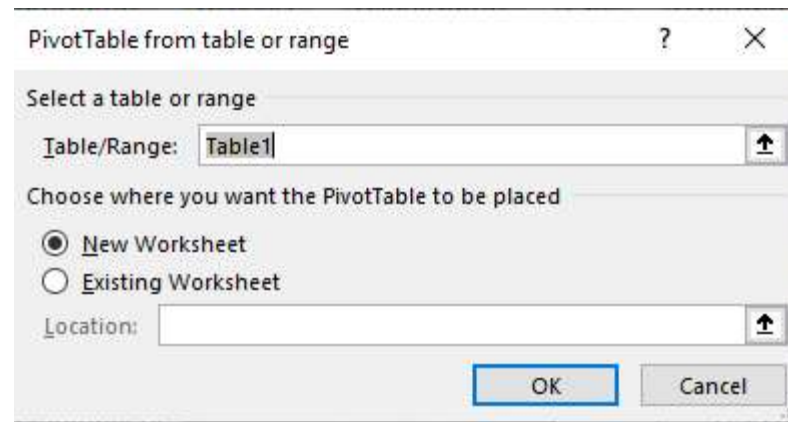
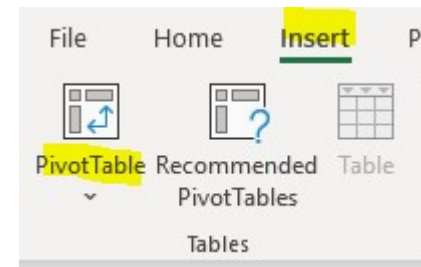
3. Right click on “Sheet1” and type “Details”





Instructions for Using the report to calculate Secondary Staff Summary

1. Go back to the “Details” tab
2. Select the entire table by using Ctrl “A”
3. Click “Insert” and then select “Pivot Table
4. Save your table as a “New Worksheet”





Continued Instructions for Using the report to calculate Secondary Staff Summary

The screenshot shows an Excel spreadsheet with a grid from column A to L and row 1 to 26. The grid is divided into four sections by blue borders:

- Row 1: "Drop Report Filter Fields Here" (columns A-G)
- Row 3: "Drop Column Fields Here" (columns A-G)
- Column A (rows 4-16): "Drop Row Fields Here" (vertical text)
- Area B-G (rows 4-16): "Drop Value Fields Here" (large central area)

The PivotTable Fields task pane is open on the right side of the spreadsheet. It contains the following elements:

- PivotTable Fields** (title bar)
- Choose fields to add to report:** (text)
- Search:** (text input field)
- Fields list:** A list of fields with checkboxes: ☐ ProgCode, ☐ ProgramName, ☐ ClientID.
- Drag fields between areas below:** (text)
- Filters:** (area with a funnel icon)
- Columns:** (area with a vertical bar icon)
- Rows:** (area with a horizontal bar icon)
- Values:** (area with a sigma icon)
- Defer Layout Update:** (checkbox)
- Update:** (button)

The spreadsheet's sheet tab bar at the bottom shows "Primary Staff Summary" and "Sheet3" (highlighted in yellow).

A new sheet "Sheet3" has been created.
Rename this "Secondary Staff Summary"



Continued Instructions for Using the report to calculate Secondary Staff Summary

This time, select the following:

1. SvcCode
2. ServiceDescription
3. CoStID
4. CoStDur

Re-order the “Rows” to the following:

1. CoStID
2. SvcCode
3. ServiceDescription

You will be presented with a summary of Durations when a Co-Staff is entered

The grand total for the Co-Staff duration will be listed at the bottom of the report

PivotTable Fields

Choose fields to add to report:

Search

☐ Travel

☒ CoStID

☒ CoStDurCoStDur

Drag fields between areas below:

Filters

Columns

Rows

CoStID

SvcCode

ServiceDescription

Values

Sum of CoStDurCoStDur



Instructions for Using the report to calculate Program Summary

((blank) Total	
(blank) Total	
Grand Total	3291
Primary Staff Summary Secondary Staff Summary ... (+) : ◀	

The Program Summary is calculated as the Grand Total from the Primary Staff tab plus the Grand Total for Secondary Staff tab



Resources

For more information:

<https://www.dhcs.ca.gov/provgovpart/Documents/SMHS-Billing-Manual-Revised-8-22.pdf>

CalAIM Payment Reform Documents

[Provider Billing & Documentation Library | San Francisco \(sf.gov\)](#)

[CalAIM-SMHS-BHS-Provider Crosswalk V3 10.30.23.xlsx \(live.com\)](#)

[CalAIM-DMC-ODS-BHS Provider Crosswalk V3.xlsx \(live.com\)](#)

CBHS Policy page:

<https://www.sfdph.org/dph/comupg/oservices/mentalhlth/cbhs/cbhsmnupolyproc.asp>

For full Avatar User Manuals please visit:

<https://www.sfdph.org/dph/comupg/oservices/mentalHlth/BHIS/avatarUserDocs.asp>

If you need further assistance, please contact the Avatar Help Desk by: Phone: (415) 255-3788
or

Email: AvatarHelp@sfdph.org



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