



Edwin M. Lee  
Mayor



Edwin Batongbacal, Director, Adult and Older Adult System of Care  
1380 Howard Street, 5<sup>th</sup> floor, San Francisco, CA 94103  
(415) 255-3446 p / (415) 255-3567/f

## MEMORANDUM

*Note: This memo supersedes any previous information provided.*

DATE: April 24, 2015  
TO: SFBHS ADULT/OLDER ADULT MENTAL HEALTH PROVIDERS  
FROM: Edwin Batongbacal, LCSW, Director, Adult/Older Adult System of Care  
RE: **Assessment, ANSA and Treatment Plan Format Changes as of June 1, 2015 and Anniversary Date Timeline change as of July 1, 2015**

This memo is to inform SFBHS Adult/OA Mental Health Service providers about the newly established timelines for the Annual Assessment and Treatment Plan as well as some slight changes in the format of these forms in Avatar.

**ANNIVERSARY DATE TIMELINE: EFFECTIVE JULY 1, 2015 ALL SFBHS ADULT/OA MH ASSESSMENTS AND TREATMENT PLANS ARE DUE ANNUALLY ON THE ANNIVERSARY DATE OF EPISODE OPENING.**

**ASSESSMENTS: AS OF JUNE, 2015, all SFBHS Adult/Older Adult providers of Mental Health Services must complete a separate Annual Assessment form for the annual assessment of all clients.** Currently the annual assessment is embedded in the Treatment Plan. However, the last State Medi-Cal audit of April 2014 found that clinicians were not completing all of the elements that the reassessment template required and therefore, it did not constitute a full assessment. As a result, **the Annual Assessment has been uncoupled from the Treatment Plan form. The current Adult/Older Adult Assessment Form (MRD 89 & 90) has been slightly modified to serve as the Initial Assessment and the Annual Assessment.** It has the same 11 items. The "Justification for Continued Treatment" is now on the Annual Assessment. The good news about this new form is that most sections will **auto-populate** from the prior assessment (such as the sections asking for history), while a few others will not (such as the mental status exam and radio buttons asking for current risk information). All sections can be modified by the clinician. Given the auto-population feature, this Assessment form now includes an attestation statement indicating that the clinician did not just copy the last assessment, but reviewed it and added current relevant information.

**ANSA: The ANSA Outcome Ratings will now be bundled with the Assessment Form.** It is a separate page which will come up after each Assessment and Diagnosis. **The ANSA will no longer be embedded in the Treatment Plan.** At the top of the ANSA page is a statement informing the clinician that "the initial ANSA can be billed as a 2<sup>nd</sup> or 3<sup>rd</sup> assessment if and when the client returns to treatment". This is intended to relieve the clinician from completing an ANSA on a client who never returns to the clinic.

**TREATMENT PLAN:** Before year's end we will begin using a new Netsmart product Treatment Plan. However, **until further notice, we will maintain the current Tx Plan. AS OF JUNE 1, the ANSA and the reassessment sections will be hidden on the current Tx Plan** to accommodate the changes to the Annual Assessment. As always, **the Tx Plan is due within the first 60 days of opening & annually (Anniversary Date) or when there is significant change in treatment focus.**

**Transition Plan:** We recognize that this change to the rule of Anniversary due date will disrupt the current annual date cycle of the documents already in place, likely causing the clinician to have to write a tx plan more than annually for this transition year. We regret this unavoidable inconvenience to our already-busy clinicians and are working on a transition plan to mitigate the extra work as much as possible. That plan will be clarified in a separate memo to A/OA clinicians.

**PURQC is also to occur annually on the Anniversary Date of Opening. New PURQC Protocols are currently being piloted and will be rolled out to all the Adult/AO programs starting in July 2015.**

**Thank you** for your hard work and efforts to ensure compliance with the necessary changes in documentation timelines.