ACHSA POSITION PAPER ON
BILLING MEDI-CAL FOR RECOVERY MODEL SERVICES
August, 2008

Purpose of Work Group: ACHSA community mental health agencies recognize the importance of providing services consistent with the recovery model. In addition, the State expects agencies to provide recovery model services, although MHSA and County General Funds are insufficient to support them. This has raised the question: Can agencies provide critical recovery model services so that they are billable under Medi-Cal? We believe that these can and would like confirmation from the State to that effect. Alternatively, if it is determined that they cannot be billed to Medi-Cal, how can we document their importance so that we can advocate that they should be billable under Medi-Cal?

Current Areas of Recovery Model that Require Clarification:

1. Socialization
2. Transportation
3. Employment
4. Housing
5. Recreation
6. Finances
7. Education
8. Physical Health
9. Legal
10. Substance Abuse

Clarifying Questions, Examples, and Recommended Progress Note Elements Relating to Each of the 10 Categories:

1. Socialization

Billing Issue Question: Can you bill for the entire time that you are in the presence of the consumer as long as there is a medically necessary reason for the consumer to participate in the activity, even though not all time is spent with medically necessary interventions?

Scenario: Client has schizophrenia resulting in isolation and difficultly in making friends. However, client has interest in football. Another client is hosting a Monday Night Football party. The service coordinator drives client to the party, stays with the client for the duration of the party, and drives client back home.

Recommended Progress Note Elements to Support Our Ability to Bill for This Service:

A. CCCP: Client states "I wish I had more friends."

B. Deficits/Barriers:

- History of socialized isolation
- Poor social interaction skills
- Suspicious of other people's motives

C. Strength: Likes Football

D. Interventions

- Service Coordinator prepares client to attend Monday night football party at fellow consumer's home.
- Service Coordinator accompanies client to pick up snacks for party to help client understand other people's reactions to choice of snacks.
- Service Coordinator identifies possible sources of comfort:
  - -Client does not know anyone
  - -Client is self conscious about own appearance
  - -Client has history of negative interactions with strangers
  - -Client has difficulty starting conversations
- Service Coordinator discusses with client wardrobe prior to attending the party.
- Service Coordinator discusses with client that there might be African Americans present at the party and client needs to learn to refrain from making racist comments.
- Service Coordinator introduces client to other people at the party.
- Service Coordinator facilitates conversations with other people at the party. Service Coordinator also assures client she would be there to intervene.
- After the party, Service Coordinator discusses with client client's feelings about the experience and lessons learned from party's interactions.

2. Transportation

Billing Issue Question: Can you bill for that portion of transportation time which supports medically necessary services?

Scenario: Service Coordinator picks up client for medication visit because client refuses to take the bus.

Recommended Progress Note Elements to Support Our Ability to Bill for This Service:

A. CCCP: Increase consistent intake of medication and continue to work with client to assume responsibility of keeping medical appointments without help.

B. Deficits/Barriers:

- Client has history of discontinuing medication when he feels better, resulting in increased hospitalization.

C. Interventions:

- Service Coordinator discusses with client the importance of keeping appointments. Client provides excuses for not keeping appointments unless Service Coordinator provides a ride.
- While taking client to the appointment, Service Coordinator discusses with client client's history of relapse due to discontinuation of medication.
- During drive home, Service Coordinator talks to client about taking responsibility for taking medication consistently.

3. Employment

Billing Issue Question #1: Is helping a consumer develop pre-employment skills and interpersonal skills billable?

Scenario #1A: Client joins a work-adjustment unit.

Recommended Progress Note Elements to Support Our Ability to bill for This Service:

A. CCCP: Increased compliance with job instructions from 1 time/month to 2 times/week as manifested by work product conforming with job specifications

B. Deficits/Barriers:

- Suspicious of authority
- Easily irritable
- Has difficulty concentrating

- Lack of awareness regarding work ethic requirements

C. Interventions:

- Service Coordinator shares feedback with client on instances when performance does not meet situational standards.
- Service Coordinator role plays with client interpersonal situations in work place regarding anger management.
- Service Coordinator identifies patterns of mental health behavior that contributed to sporadic job loss and discusses this with client.
- Service Coordinator identifies barriers on why client is not following through with plan.

Scenario #1B: Client wants to work, but has fears about working.

Recommended Progress Note Elements to Support Our Ability to Bill for This Service:

A. CCCP: Decrease angry reactions due to criticism from 5 times per week to 2 times per week.

B. Deficits/Barriers:

- Poor social interaction skills
- Does not accept supervision and does not like taking orders from supervisor
- Can not relate to co-workers
- Frequent outbursts of anger

C. Interventions:

- Service Coordinator conducts role playing various situations to help client decrease anxiety.
- Client had negative thoughts and Service Coordinator challenges those negative thoughts.

Billing Issue Question #2: Is the time that Service Coordinator spends in the community billable?

Scenario #2A: Client is employed in community and has lunch break from 1 PM -2 PM. Service Coordinator goes out to visit client during lunch break because it is his first week at work.

Recommended Progress Note Elements to Support Our Ability to bill for This Service:

A. CCCP: Increased client's ability to manage anxiety while he has a job.

B. Deficits/Barriers:

- High anxiety
- Frequent outbursts of anger

C. Interventions:

- Service Coordinator discusses with client how to manage anxiety on the job.
- Service Coordinator interviews client on what caused him to have negative reactions to particular event
- Service Coordinator discusses with clients how he could have handled situation differently.

Scenario #2B: Client is employed and shares with Service Coordinator that he is having problems with the Manager. Client refuses to discuss problems with manager and wants Service Coordinator to mediate.

Recommended Progress Note Elements to Support Our Ability to bill for This Service:

A. CCCP: Increase client's ability to resolve conflicts from 1 time/month to 1 time/week.

B. Deficits/Barriers:

- Suspicious of authority
- Frequent outbursts of anger

C. Intervention:

- Service Coordinator interacts with manager *WHILE CLIENT IS PRESENT* to model for client appropriate behavior so that client can learn how to advocate for himself.

4. Housing

Billing Issue Question #1: Is helping the consumer locate housing billable?

Scenario: Client currently lives in board and care and wants to move into his own apartment.

Recommended Progress Note Elements to Support Our Ability to Bill for This Service:

A. CCCP: Client wants to move into own apartment.

B. Deficits/Barriers:

- No age appropriate functional abilities
- Impoverished fund of knowledge
- Easily overwhelmed
- Undeveloped negotiations skills

C. Interventions:

- Service Coordinator takes client to explore housing options.
- Service Coordinator helps client identify needs, landlord and neighbors expectations, and how to adjust to those expectations.

As a general rule of thumb, services linked to skills building are billable.

Billing Issue Question #2: Is helping the consumer to fill out paperwork for housing billable?

Scenario #2: Client has decided on a particular housing option but needs help filling out paperwork.

Recommended Progress Note Elements to Support Our Ability to Bill for This Service:

A. CCCP: Client needs to learn how to navigate through complicated paperwork process to obtain housing (e.g., filling out the Section 8 permanent housing application and obtaining necessary documents for the application process like birth certificates, SSI paperwork).

B. Barriers/Deficits:

- Easily overwhelmed
- High anxiety

C. Interventions:

- Service Coordinator assists client in filling out paperwork because he does not have good historical knowledge due to mental illness.
- Service Coordinator fills out remaining 50% of paperwork because client is easily overwhelmed and wants to quit filing out paperwork.

Billing Issue Question #3: Is helping the consumer to maintain housing billable?

Scenario #3: There will be a Section 8 housing inspection at a client's place of residence.

Recommended Progress Note Elements to Support Our Ability to Bill for This Service:

A. CCCP: Assist client in developing good hygiene as poor hygiene is consequence of mental health disorder so as to maintain adequate housing.

B. Barriers/Deficits:

- Unmotivated
- Poor hygiene skills
- Poor social interaction skills

C. Interventions:

- Service Coordinator works with client to come up with plan to clean up house in anticipation of Section 8 housing inspection.
- Service Coordinator coaches and guides client on what good hygiene looks like.
- Service Coordinator discusses with client the consequences of continued behavior in poor hygiene.

5. Recreation/Leisure Time (Different from socialization because this is an individual activity.)

Billing Issue Question: Is helping consumer develop recreational/leisure time interests billable?

Scenario: As a result of mental illness, client has no interest in pleasure seeking activities. Service Coordinator helps client explore interests.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Client wants to learn how to play guitar.

B. Deficits/Barriers:

- No guitar skills
- Does not own guitar

C. Interventions:

- Service Coordinator helps client figure out ways to access guitar.
- Service Coordinator discusses with client money management skills or possibilities of earning extra money to save up for or finance a guitar.

6. Finances

Billing Issue Question: Is helping a consumer with money management issues billable?

Scenario #1: A client (who is not under "involuntary payeeship") voluntarily requests help with budgeting.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Client wants to learn how to manage his money.
B. Deficits/Barriers:
- Lack of strong history of managing money effectively

C. Interventions:
- Service Coordinator helps client figure out how to budget once the rent is paid.

Scenario #1B: Client is suffering from substance abuse and mental health impairment and is having trouble managing his money.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Client wants to learn how to manage his money.
B. Deficits/Barriers:
- Uses money to buy drugs to feed into substance abuse behavior

Additional Question: If the connection between substance abuse and mental health impairment is documented in the Adult Initial Assessment, does the Service Coordinator need to document this for every interaction in the progress notes?

7. Education

Billing Issue Question #1: Is assisting consumer in developing educational study skills billable?

Scenario #1A: Client wants a social study partner at school.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Increase client's interaction with classmates while studying to 1 x/ week
B. Deficits/Barriers:
- Experiences social isolation
- Has difficulty trusting people

C. Interventions:
- Service Coordinator discusses with client's potential study partners and role plays with client how to ask friends to be study partners

Scenario #1B: Client who is adult in school has lunch break from 1 PM -2 PM. Service Coordinator goes out to visit client during lunch break because it is his first week at school.

Recommended Progress Note Elements to Support Our Ability to bill for This Service:
A. CCCP: Increased client's ability to manage anxiety while he is in school.
B. Deficits/Barriers:
- High anxiety
- Frequent outbursts of anger

C. Interventions:
- Service Coordinator discusses with client how to manage anxiety at school.
- Service Coordinator interviews client on what caused him to have negative reactions to particular event.
- Service Coordinator discusses with clients how he could have handled situation differently.

Billing Issue Question #2: Is helping consumer while consumer is at school billable?

Scenario: Service Coordinator goes to school with client, interfaces with teacher/client. Service Coordinator also sits with client in classes to help client focus and reduce his distractions.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:
A: CCCP: Increase client's comfort in school setting

B. Deficits/Barriers:

- Fearful of attending class
- Experiences social isolation

C. Interventions:

- Service Coordinator provides prompting to client during class regarding appropriate behavior.
- Service Coordinator talks with client regarding triggers when client acts out.

8. Physical Health

Billing Issue Question #1: Is assisting the consumer with diet and nutrition billable?

Scenario: Client is gaining weight as a result of medication and feels bad about his appearance. Client wants to lose weight.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Client reports putting on 40 pounds since starting to take anti-psychotic medication. Service Coordinator concerned that client will discontinue medication.

B. Deficits/Barriers:

- Poor self care
- Lacks motivation to follow through
- Low frustration tolerance

C. Interventions:

- Service Coordinator discusses different weight loss regimens with client (i.e. going for daily exercise, nutrition, going to Weight Watchers).
- Service Coordinator encourages client to log food intake on daily basis.
- Service Coordinator suggests that client talk to doctor about alternative medications that do not have weight gain as side effect.

Billing Issue Question #2: Is helping client access health service billable?

Scenario #2: Client has diabetes and has to go to the doctor's office for an appointment.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Continue to work with client to assume responsibility of keeping medical appointments without help.

B. Barriers/Deficits:

- Afraid of doctors and believes doctors will hurt them

C. Intervention:

- Service Coordinator waits with client in the waiting room. During the waiting process, Service Coordinator works with client on relaxation techniques.

Billing Issue Question #3: Is monitoring health care compliance billable?

Scenario #3: Service Coordinator follows up with client to see if he has gone to the doctor/dentist. Service Coordinator asks client if he is following doctor's instructions.

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Client reports that he wants to go to the dentist for a toothache.

B. Deficits/Barriers:

- Suffers from paranoia
- Fears going to the dentist

C. Interventions:

- Service Coordinator calls client to see if he has gone to see the dentist for the first time.

9. Legal

Billing Issue Question #1: Is helping consumers deal with interactions relating to the legal system billable?

Scenario: Service Coordinator accompanies client to Court for court appearance to provide support. Service Coordinator waits with client at the Court house until the judge hears client's case. Is this entire time billable?

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Client needs to go to Court for a hearing.
B. Deficits/Barriers:
- Suffers from paranoia and anxiety

C. Interventions:
- Service Coordinator sits with client in the Court house for 3 hours. During this time Service Coordinator talks with client about appropriate behavior before the judge, consequences of not behaving properly in court room.

10. Substance Abuse

Billing Issue Question: Can you provide assistance with substance abuse issues not directly related to consumer's mental health?

Scenario: Client does not seem actively psychotic but walks into the Service Coordinator's office and says, "I am thinking about using again."

Recommended Progress Note Elements to Support Agency's Ability to Bill for This Service:

A. CCCP: Service Coordinator wants to improve and enhance client's motivation to remain sober.
B. Deficits/Barriers:
- Tenuous commitment to sobriety

C. Interventions:
- Service Coordinator accompanies client to substance abuse meeting.
- Service Coordinator suggests to client that client contact his sponsor.