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| <b>Health Care Agency</b>         | Section Name:   | Compliance   |
| <b>Behavioral Health Services</b> | Sub Section     | Billing  |
| <b>Policies and Procedures</b>    | Section Number: | 07.01.03   |
|                                   | Policy Status:  | <input type="checkbox"/> New <input checked="" type="checkbox"/> Revised |

|  | SIGNATURE                | DATE APPROVED  |
|--|--------------------------|----------------|
| Director of Operations<br>Behavioral Health Operations | <u>Signature on File</u> | <u>3/29/19</u> |

**SUBJECT:** Development of Certified Reviewers

**PURPOSE:**

To ensure staff responsible for reviewing documentation of services are knowledgeable and well trained in identifying the presence of required documentation components that are compliant with Medicare/Medi-Cal reimbursement documentation requirements.

**POLICY:**

All Reviewers shall complete a designated orientation and training program prior to performing unsupervised reviews of billable clinical documents.

**SCOPE:**

This policy applies to all Adult and Older Adult Behavioral Health Services (AOABH) County and County Contracted staff that are responsible to review documentation prior to the submission of bills for billing.

**FORMS:**

Certified Reviewer Training Verification Application Guidelines (rev. 10/01/18)

Certified Reviewer Training Verification Application (revised 10/01/18)

Certified Reviewer Progress Note Cover Sheet (revised 10/01/18)

Certified Reviewer Care Plan Cover Sheet (revised 10/01/18)

(Forms Available only from BHS AQIS AOABH 714-834-5601)

**DEFINITIONS:**

Certified Reviewer Applicant - a trained, licensed mental health professional who completed an orientation and training program, as well as perform a review of billable clinical documents (Encounter Document (ED), client chart, etc. prior to Medicare/Medi-Cal billing, to ensure compliance with reimbursement documentation requirements.

**PROCEDURE:**

- I. Prospective Certified Reviewer applicants shall complete a training program that includes the following steps before they are permitted to conduct independent reviews of documents.
  - A. Attend and complete AOABH New Provider Documentation Training (day 1 of the Documentation training) during the 90 days prior to beginning independent review of documents.
  - B. Attend the AOABH New Provider Care Plan (CP) training (day 2 of the Documentation training) no more than 90 days prior to starting independent reviews.
  - C. Complete 1 hour of observation of AQIS Reviewing Audit Excel Logs.
  - D. Complete 4 hours observation of AQIS Reviewer conducting reviews.
  - E. Complete a minimum of twelve (12) hours reviewing documentation under the supervision of a Certified Reviewer (Certified Reviewer must be certified for a minimum of one year).
  - F. Complete the most recent Health Care Agency (HCA) Annual Provider Training and submit certificate.
  - G. Submit ten (10) sets of Care Plan Packets including:
    1. Psychosocial/Periodic Re-Evaluation, Diagnosis Form, Community Functioning Evaluation (CFE), and Care Plan with all required signatures.
    2. Corresponding Assessment Notes.
    3. Cover Sheet for each Care Plan Packets.
  - H. Submit additional passable Progress Notes:
    1. 2 Billable Crisis Notes.
    2. 2 Billable Case Management Notes.
    3. 2 Billable Mental Health Services (MHS) (Rehab/Therapy/Collateral) Notes.
    4. Cover Sheet for each Progress Notes.
  - I. If the Prospective Certified Reviewer applicant is unable to pass the assessment of reviewer skills, as evidenced by turning in at least ten (10) sets of Care Plan Packets and (6) Billable Progress Notes in which the AQIS AOABH Program Manager or designee concurs with the Certified Reviewer's decision, the

Prospective Certified Reviewer applicant will be required to continue to submit one additional time (steps G-H). If both submission do not pass, the Prospective Certified Reviewer applicant will need to re-apply and initiate the Certified Reviewer Application Process. After each submission, AQIS AOABH Program Manager or designee will schedule a meeting to discuss the failed submissions.

- J. After successful completion of steps A – H, the Certified Reviewer applicant will be contacted by AQIS AOABH Program Manager or designee to schedule a meeting to discuss the packets submitted. The Certified Reviewer applicant will also be provided with a Certificate.
- K. Certified Reviewers are required to attend the monthly AQIS Core Trainers meetings. If they are unable to attend they are to notify the AQIS AOABH Program Manager or designee.

II. Confirming Training and Maintaining Records

- A. Each step shall be signed off by the person with responsibility for providing the supervised experience or by the AQIS AOABH Program Manager or Designee.
- B. The AQIS AOABH Program Manager or Designee shall retain a copy of the Certified Reviewer applicant training verification application.