



Health Care Agency Behavioral Health Services Policies and Procedures	Section Name:	Care and Treatment
	Sub Section:	Access
	Section Number:	01.03.04
	Policy Status:	☐ New ☒ Revised
SIGNATURE		DATE APPROVED
Director of Operations Behavioral Health Services	<u>Signature on File</u>	<u>10/17/2025</u>

SUBJECT:	Telehealth Services in the Behavioral Health Plan
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PURPOSE:

To provide timely and appropriate telehealth services to members of the Orange County Health Care Agency (OCHCA), Behavioral Health Services (BHS) and to comply with all applicable federal and state laws and regulations pertaining to telehealth services (e.g., Health Insurance Portability and Accountability Act (HIPAA), California's Confidentiality of Medical Information Act, Privacy Rules, 42 CFR Part 2 and Welfare and Institutions Code section 5328).

POLICY:

BHS staff in the County of Orange Behavioral Health Plan (hereby referred to as Orange County BHP) shall provide telehealth services in accordance with the requirements set forth by the California Department of Health Care Services (DHCS) to ensure Medi-Cal covered benefits or services are being provided. Telehealth services may be provided to members when other equivalent in-person services are not available or if the members and providers have a clinical need for this modality of service delivery. A clinician, psychiatrist, or member's current treatment provider shall determine if it is clinically appropriate for a member to receive services through telehealth.

All services provided via telehealth require explicit written consent from the member, or member's legal representative or parent. This consent shall be documented and placed in the member's health record.

SCOPE:

This policy applies to all County and County Contracted Orange County BHP providers and staff, including Specialty Mental Health Services (SMHS) and Drug Medi-Cal Organized Delivery System (DMC-ODS) providers, who are providing services within their scope of practice and who meet the requirements as a Provider under Business and Professions Code section 2290.5 (a)(3)).

REFERENCES:

[Business and Professions Code § 2290.5](#)

[Business and Professions Code §§ 2290.5\(a\) \(2-4\)](#)

42 Code of Federal Regulations (CFR) Part 2, Confidentiality of Substance Use Disorder Patient Records

[California Department of Health Care Services, Medi-Cal Provider Manual – Telehealth](#)

[OCHCA BHS Telehealth Practice Guideline](#)

[Behavioral Health Information Notice No.: 23-018 Updated Telehealth Guidance for SMHS and SUD Treatment Services in Medi-Cal](#)

FORMS:

[OCHCA BHS Informed Consent For Services and Telehealth Consent](#)

DEFINITIONS:

Asynchronous store and forward - The transmission of a patient's medical information from an originating site to the health care provider at a distant site without the presence of the patient. (Business and Professions Code section 2290.5(a)(1))

Distant Site - A site where a health care provider who provides health care services is located while providing these services via a telecommunications system. (Business and Professions Code section 2290.5(a)(2))

E-Consults - Asynchronous health record consultation services that provide an assessment and management services in which the patient's treating health care practitioner (i.e., attending or primary) request the opinion and/or treatment advise of another health care practitioner (i.e., consultant) with specific specialty expertise to assist in the diagnosis and/or management of a patient's health care needs without patient face-to-face contact with the consultant. E-consults between health care providers are designed to offer coordinated multidisciplinary case reviews, advisory opinions and recommendations of care. E-consults are permissible only between health care providers.

Health Care Provider – A person rendering Medi-Cal covered benefits or services provided via a telehealth modality must meet the requirements of Business and Professions Code (B&P Code), Section 2290.5(a)(3), or equivalent requirements under California law in which the provider is considered to be licensed.

Originating Site - A site where a patient is located at the time health care services are provided via a telecommunications system or where the asynchronous store and forward service originates. (Business and Professions Code section 2290.5(a)(4))

Synchronous interaction - A real-time interaction between a patient and a health care provider located at a distant site. (Business and Professions Code section 2290.5(a)(5))

Telemedicine - Two-way, real time interactive communication between the patient and the physician or practitioner at the distant site. This electronic communication means the use of interactive telecommunications equipment that includes, at a minimum, audio and video equipment. (Centers for Medicare and Medicaid Services website)

Telehealth - The mode of delivering health care services and public health via information and communication technologies to facilitate the diagnosis, consultation, treatment, education, care management, and self-management of a patient's health care while the patient is at the originating site and the health care provider is at a distant site. Telehealth facilitates patient self-management and caregiver support for patients and includes synchronous interactions and asynchronous store and forward transfers. (Telehealth includes telemedicine.) (Business and Professions Code section 2290.5(a)(6))

PROCEDURE:

I. Telehealth criteria

- A. Treating provider at the distant site believes that the Medi-Cal benefits or services being provided are clinically appropriate based upon evidence-based medicine and/or best practices to be delivered via telehealth, subject to written consent by the member.
- B. Benefits or services delivered via telehealth meet the procedural definition and components of that type of service.
- C. The benefits or services provided via telehealth meet all laws regarding confidentiality of health care information and a member's right to his or her medical information.

II. Telehealth services are subject to the same privacy and security laws and regulations as services provided face-to-face. Providers must ensure that the video equipment that will be used to provide telehealth is compliant for HIPAA, California's Confidentiality of Medical Information Act, and if applicable, 42 CFR Part 2 or California Welfare and Institutions Code §5328.

- A. The provider opting to utilize telehealth is responsible for ensuring that they provide the member with the appropriate administrative, physical, and technical safeguards to protect the member's privacy during the telehealth session.

III. Each telehealth provider must meet the requirements listed under the definition of Health Care Provider, such as in possession of a California professional license or equivalent, working toward licensure and supervised by a license mental health professional working within their scope of practice.

- A. Requirements for non-registered student trainees or interns enrolled in a master's or doctoral training program prior to providing telehealth.

1. Social work Interns
 - a) Permissibility of telehealth by social work interns is determined by the school and the school's accrediting agency.
 2. Clinical Counselor Trainees
 - a) Allowed to provide telehealth services only after the school's approval. A written agreement with the site detailing, among other things, the methods by which supervision shall be provided, must be kept on site for audit purposes.
 3. Marriage and Family Therapist Trainees (MFT Trainees)
 - a) The school must provide approval for telehealth prior to telehealth services being provided. A written agreement with the site detailing, among other things, the methods by which supervision shall be provided.
 4. Psychological Trainees
 - a) Trainees may provide psychological services via telehealth as long as they are properly supervised in doing so and the supervisor is adequately trained and experienced.
- B. For providers not specifically included in Business and Professions Code (B&P Code), Section 2290.5:
1. All providers that are listed in the California Medicaid State Plan as qualified providers of SMHS, DMC, or DMC-ODS services are designated by DHCS as eligible to render covered services, within their scopes of practice, via telehealth.
- IV. Before telehealth can be provided, a written consent from the member or member's legal representative for the use of telehealth as an acceptable mode of delivering health care services must be obtained and documented in the member's medical record.
- A. The General Informed Consent for Telehealth Services must contain the following information:
1. A description of the risks, benefits, and consequences of telehealth.
 2. The member's right to withdraw consent at any time without affecting the right to future care or treatment nor risking the loss or withdrawal of any program benefit to which the member would otherwise be entitled.
 3. The member's right to confidentiality protections still applies.

4. The member's right to access and copies of all transmitted medical/mental health information.
 5. Explanation that there shall be no dissemination of any member images or information to other entities without further written consent and an Authorization to Disclose (ATD) Protected Health Information (PHI).
- B. A member shall not be precluded from receiving in-person health care delivery services during a specified course of health care and treatment after agreeing to receive services via telehealth.
- C. Both the originating and distant sites must obtain a BHS Informed Consent for Services and Telehealth Consent if the member's medical record is not shared.

V. Documentation and claiming standards

- A. The following types of Specialty Mental Health Services may be provided through telehealth:
1. Individual Psychotherapy
 2. Assessment services
 3. Collateral services
 4. Group Psychotherapy/Multi-family Group Psychotherapy
 5. Crisis intervention services excluding 5150/5585 evaluations and Mobile Crisis Services
 6. Plan Development services
 7. Targeted Case Management
 8. Therapeutic behavioral services
 9. Peer Support Services
 10. Intensive Care Coordination (ICC)
 11. Intensive Home-Based services (IHBS)
 12. Medication Support services
 13. Components of day treatment (if applicable)
 - a) Intensive, day rehabilitation

- b) Adult residential treatment services, and
 - c) Crisis residential treatment services.
- B. The following type of DMC-ODS services may be provided through telehealth:
 - 1. Assessments
 - a) Initial Intakes
 - b) Assessments
 - c) Treatment Planning Activities
 - 2. Individual Counseling sessions (DMC-ODS)
 - 3. Collateral services
 - 4. Group Counseling
 - 5. Case Management/Consultations
 - 6. Discharge Planning activities
- C. While this policy and procedure defines the usage of telehealth in the provision of behavioral health services to members in the Orange County BHP, it remains a programmatic decision to restrict provision of telehealth services in specific settings and/or circumstances.
- D. Certain SMHS, such as day rehabilitation, day treatment intensive, crisis residential treatment services, and adult residential treatment services, require a clearly established site for services and in-person contact with a member in order to be a billable service. However, not all components of these services must be provided in-person.
- E. Certain DMC-ODS services, such as residential services, require a clearly established site for services and in-person contact with a member in order to be claimed and therefore is not an allowable service to provide via telehealth.
- F. Each progress note must indicate the following:
 - 1. The service was provided through telehealth, and that the provider intends for the encounter to take the place of a face-to-face visit.
 - 2. The service is medically necessary, is clinically appropriate to be delivered via telehealth and does not require the physical presence of the member.
 - 3. The service was provided to a member currently located in the State of California and that the provider verified the member's location.

- G. All required documentation elements for the type of service provided are still required when utilizing telehealth, and the steps the clinician took to ensure the member's privacy was protected need to be documented.
 - H. Providers must use the appropriate procedure codes for the type of services being provided via telehealth.
 - I. Providers should add any applicable telehealth modifier on the progress note to identify that the service was rendered via telehealth even if the modifier is not accepted into the Orange County BHP's Integrated Records Information System (IRIS) system.
 - J. Licensed providers and non-licensed staff may provide services via telehealth, as long as the service is within their scope of practice and the appropriate co-signatures, as necessary, are obtained. Both the licensed provider and non-licensed staff and the member must be located in California.
- VI. The above procedures must be followed at all times when providing telehealth. In the event of a declaration of a National Disaster or National Emergency, Quality Management Services (QMS) will provide written guidance on any temporary modification to this policy and procedure.
- VII. Providers shall consult the OCHCA BHS Telehealth Practice Guideline and Quick Guides as part of provision of services via telehealth. Practice Guidelines are, by definition, guidelines and do not supersede any Policies and Procedures.