



Updates to Clinician's Gateway (CG) Substance Use Disorder Templates

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January 18, 2023

Introduction

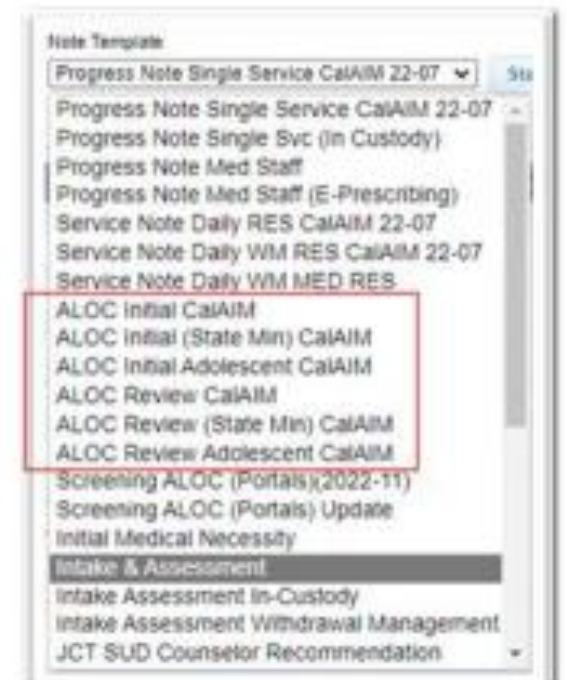
- With the launch of the CalAIM documentation redesign and requirements for tracking timely access to services, there has been need to update some of the CG templates.

- Training Content:

- *Changes to ALOC Templates*
- *Changes to Diagnosis and Assessment Templates*
- *Diagnosis Form SUD and Diagnosis Form SUD Update*
- *Assessment Full ASAM and Assessment Full ASAM Adolescent*
- *Training Templates*

Changes to ALOC Templates

- With the launch of the new Timely Access Data Collection templates in CG in December, tracking of timely access data within other CG templates became redundant.
- In partnership with ACBH Information Systems, the following notes were updated and fields related to tracking timeliness were removed:
 - ALOC Initial
 - ALOC Initial (State Min)
 - ALOC Initial Adolescent
 - ALOC Review
 - ALOC Review (State Min)
 - ALOC Review Adolescent
- The new templates were launched in CG in December 2022 and have CalAIM at the end of their title. The old templates have been removed.



Changes to Diagnosis and Assessment Templates

- The following five (5) new CG templates will be launched on **February 6, 2023**:
 - Diagnosis Form
 - Assessment Full ASAM
 - Assessment Full ASAM Update
 - Assessment Full ASAM Adolescent
 - Assessment Full ASAM Adolescent Update
- With the launch of the new forms, the following templates will be removed from CG:
 - Initial Medical Necessity
 - Justification for Continuing Services
 - Counselor Recommendation
 - Intake and Assessment
- The following slides provide more information regarding the new templates.

Diagnosis Form SUD and Diagnosis Form SUD Update

- The Diagnosis Form SUD replaces the Initial Medical Necessity (IMN) form that is currently used to establish the SUD diagnosis.
- These templates have been simplified to only include the essential information needed to establish and document criteria for the diagnoses being treated.
- The due date for completion of the Diagnosis Form is the same as the IMN and is determined by the Level of Care (LOC) in which the beneficiary is receiving services.
- The Diagnosis Form Update is used to update the diagnosis as treatment progresses.
- The Diagnosis Update Form auto populates from the most recently finalized Diagnosis or Diagnosis Update Form.
- Completing these forms will not update the diagnoses on the Problem List or in InSyst. That information should be updated separately.



Diagnosis Form SUD and Diagnosis Form SUD Update, Cont.

- In the Primary field, only SUD diagnoses and codes Z55 to Z65 are allowed. Note: for adult beneficiaries codes Z55 to Z65 are only allowed during the assessment period.
- LPHAs must use the current edition of the DSM-5 for diagnosing.
- The Additional diagnosis field is optional and accepts both MH and SUD diagnoses.
- Only LPHAs have the scope of practice to complete this form and establish diagnoses in the SUD system. If completed by a registered LPHA, it must be co-signed by a licensed LPHA.

Assessment Full ASAM & Assessment Full ASAM Adolescent

- Per CalAIM documentation reform, described in BHINs [21-075](#) and [22-019](#), DMC-ODS beneficiaries are required to have an assessment based on [The ASAM Criteria](#).
- To meet this requirement, ACBH has combined the two primary assessment templates, the ALOC and Intake & Assessment, into these abbreviated templates based on The ASAM Criteria.
- Additionally, all fields related to tracking timeliness were removed from these new templates.
- The new assessment templates will continue to collect ASAM level of care (LOC) data and it is important that those fields be completed accurately.
- Per BHIN 21-075, if the assessment of a beneficiary is completed by a SUD counselor, a LPHA must evaluate that assessment with the counselor prior to making the initial diagnosis. As a result, LPHA co-signature on all assessments completed by SUD counselors is required.
- For services other than Narcotic Treatment and Opioid Treatment Programs (NTP/OTP), the Intake & Assessment and ALOC templates are no longer required. However, the ALOC may still be used as a brief LOC screener, but does not meet ASAM or assessment requirements.



Narcotic Treatment Programs

- CalAIM documentation requirements as specified in BHIN 22-019 do not apply to NTP/OTP programs.
- NTP/OTP documentation requirements are described in [9 CCR, Div. 4, Ch. 4 Narcotic Treatment Programs](#) and are based on federal standards.
- However, per the DMC-ODS Intergovernmental Agreement and BHIN 21-075, NTPs/OTPs are required to complete an ASAM level of care assessment and refer beneficiaries to other identified services.
- To meet this requirement, NTP/OTPs should **continue to utilize the ALOC template.**
- The ALOC State Minimum form may only be used by OTP/NTP Programs when contractually allowed.
- OTP/NTPs are currently only required to complete ALOCs and Timeliness data tracking in CG.

Assessment Full ASAM Update & Assessment Full ASAM Adolescent Update

- ASAM re-assessments are required whenever the beneficiary's condition changes.
- To assist with clinically appropriate re-assessment, two new forms, the Assessment Full ASAM Update and Assessment Full ASAM Adolescent Update have been developed.
- These forms will pre-populate with assessment information from the previous assessment in the same RU.
- Clinical staff completing the update shall review the pre-populated information and update as appropriate.

CG Tracking Codes

- Forms in CG require Tracking Codes
- The following tracking codes should be used on these new forms:

Template Name	Tracking Code Number	Tracking Code Description
Diagnosis form and Diagnosis Update form	881	SUD TRCK DX/MEDNEC/JUSTIFICATN
Assessment Full ASAM forms	882	SUD TRACKING ALOC

Service #: New Title: Assessment Full ASAM TEST

Service date: 01/19/2023

Util. review date:

Plan due date:

Client: Number: Unknown Last Name: First Name: ...

Procedures: 882 SUD TRACKING ALOC

Service Location: Select Location

Med. Compliant: Yes Side Effects: No

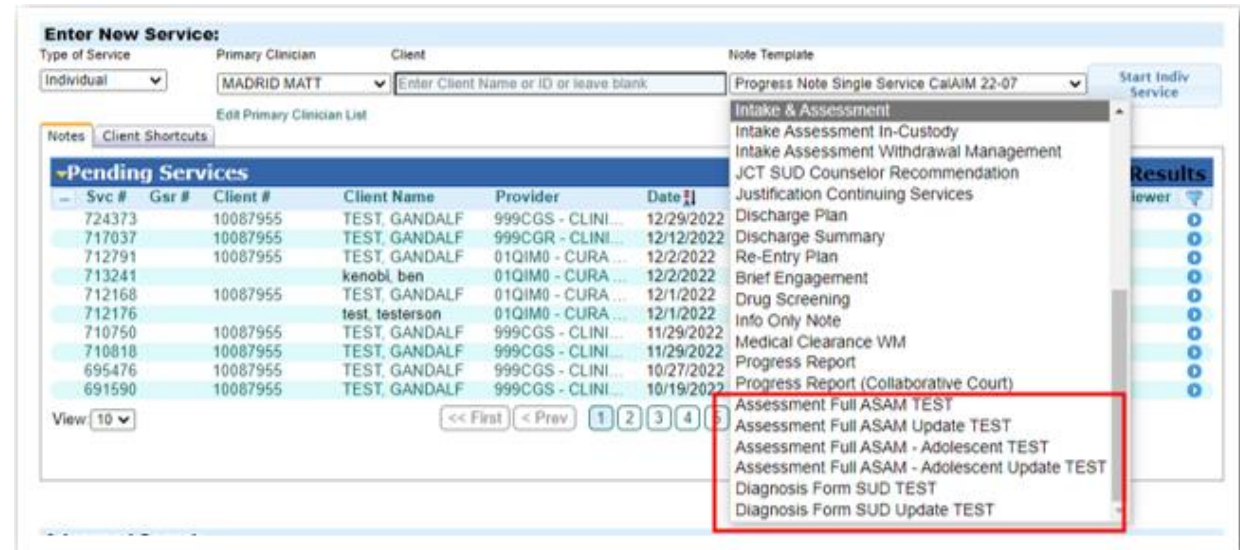
Emergency? Pregnant/Post-Partum?

Utilization Management (UM) Authorization Process

- The roll out of these new forms does not change the pre-authorization process for ASAM 3.1, 3.3, and 3.5 residential treatment services.
- Providers requesting an Initial 30 day authorization should complete both the Diagnosis Form and the Assessment Full ASAM templates.
- When requesting authorization beyond the first 30 days, providers should complete the Assessment Full ASAM Update template only. The Diagnosis Form does not need to be completed for authorization beyond the first 30 days.

Training Templates

- Training versions of these new Templates are available in CG and can be used to train staff prior to the **February 6th** roll out.
- These Test templates can be found at the bottom of the Note Template dropdown menu with the words "TEST" at the end of each title.
- To start the note, choose "Individual" for Type of Service
- Use a client with an open episode. If you have opened a dummy client, you can use that client for training. Alternatively, you can use an actual client with PHI removed.
- Do NOT Finalize the note as it will drop into the real InSYST billing system which does not have a test environment.
- Leave the note without saving or save as Pending to check the validations and required fields.



thank you.

Contact QATA@acgov.org for questions



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