

- MEMORANDUM -

DATE: February 3, 2022
TO: **ACBH Specialty Mental Health Services (SMHS) Outpatient Providers**
FROM: Torfeh Rejali, Quality Assurance (QA) Administrator *Torfeh Rejali*
SUBJECT: **Change to CQRT Process and Checklist for SMHS Outpatient Programs**

The purpose of this memo is to notify you of changes to the Clinical Quality Review Team (CQRT) process, the County's process for certifying that Medi-Cal claims meet Federal and State requirements. These changes include significant revisions to the CQRT Checklist and protocols with the goal of streamlining and simplifying the process and alleviating unnecessary provider administrative burden and are effective immediately.

We would like to acknowledge the ACBH and Behavioral Health (BH) Collaborative Steering committee and work groups who dedicated many hours of time to develop the new CQRT Checklist and process.

Summary of Changes to the CQRT Process:

Previously, the CQRT process was required for all client charts during the CQRT Review Cycle; the new process allows for some flexibility, based on the structure of the program and the provider's judgement regarding the best approach to meet the goal of the CQRT.

The new protocols are as follows:

Frequency:

Each month the program will review a minimum of 5% of the total number of new and annual charts combined. This will allow the provider flexibility to determine whether to choose a higher percentage of new or annual charts based on their census. This is the minimum requirement but programs can choose to review more charts if desired.

Example:

Agency A has a total of five hundred (500) open charts. Sixty (60) have passed day sixty (60) and are up for initial review. One hundred (100) are up for annual review (i.e. this is the CQRT in the month before their episode opening month). That is a total of One hundred sixty (160) initial and annual charts. Under this model, a minimum of eight (8) of these charts would need to be reviewed. Providers can decide how many of each type to choose. Providers may also decide to choose more than eight (8) for review.

Sampling Methodology:

Each agency will choose the sampling methodology that would work best for their system from the list below and document their plan in their Policy and Procedures.

Sampling options include the following:

- Random Sampling: Pick a number and pull randomly.





- Sampling based on clinician strength/competence: Review less charts by more seasoned staff and more by staff who are newer and/or who have had difficulty with their documentation.
- Sampling based on type of case: For example, and not limited to; high billing, long duration, and/or frequency of services

Best practices:

When reviewing charts, agencies should follow these best practices based on the principle that one chart stands for all other charts:

- The list of charts being reviewed will not be released in advance of the review.
- If a problem is identified, additional actions are taken by the agency which could include the following:
 - Review of deficiencies with staff member or staff member's supervisor
 - Review additional charts
 - Identify themes and areas of concern
 - Address areas of concern by retraining staff, sharing educational materials, providing coaching, etc.
 - Other steps identified by the agency

Summary of Changes to the CQRT Checklist:

The CQRT Checklist was streamlined to primarily include the requirements that were identified by Department of Health Care Services (DHCS) as reasons for recoupment for FY 2020-2021. Other items that were added, such as Informing Materials, were felt to be critical components of the client chart and important to review during the CQRT process. **The Checklist will be revised as updated guidance related to reasons for recoupment is received from DHCS.**

Action Required:

Specialty Mental Health Service providers who have been conducting internal CQRTs for their outpatient programs should review and implement the changes to the CQRT process discussed in this memo.

We invite you to join us for Brown Bags every other Friday from 12pm-1pm and welcome your questions and opportunities for clarification of this and other changes and processes. **The next Brown Bag meeting is scheduled for Thursday 2/10 from 12:00-1:00.** Note that the date was changed to accommodate the Holiday on 2/11. If you do not have the meeting on your calendar, below is the link and call-in information:

Link: <https://global.gotomeeting.com/join/173324541>

You can also dial in using your phone.

United States (Toll Free): 1 877 309 2073
- One-touch: <tel:+18773092073,,173324541#>
Access Code: 173-324-541

For questions, please contact QATA@acgov.org.

