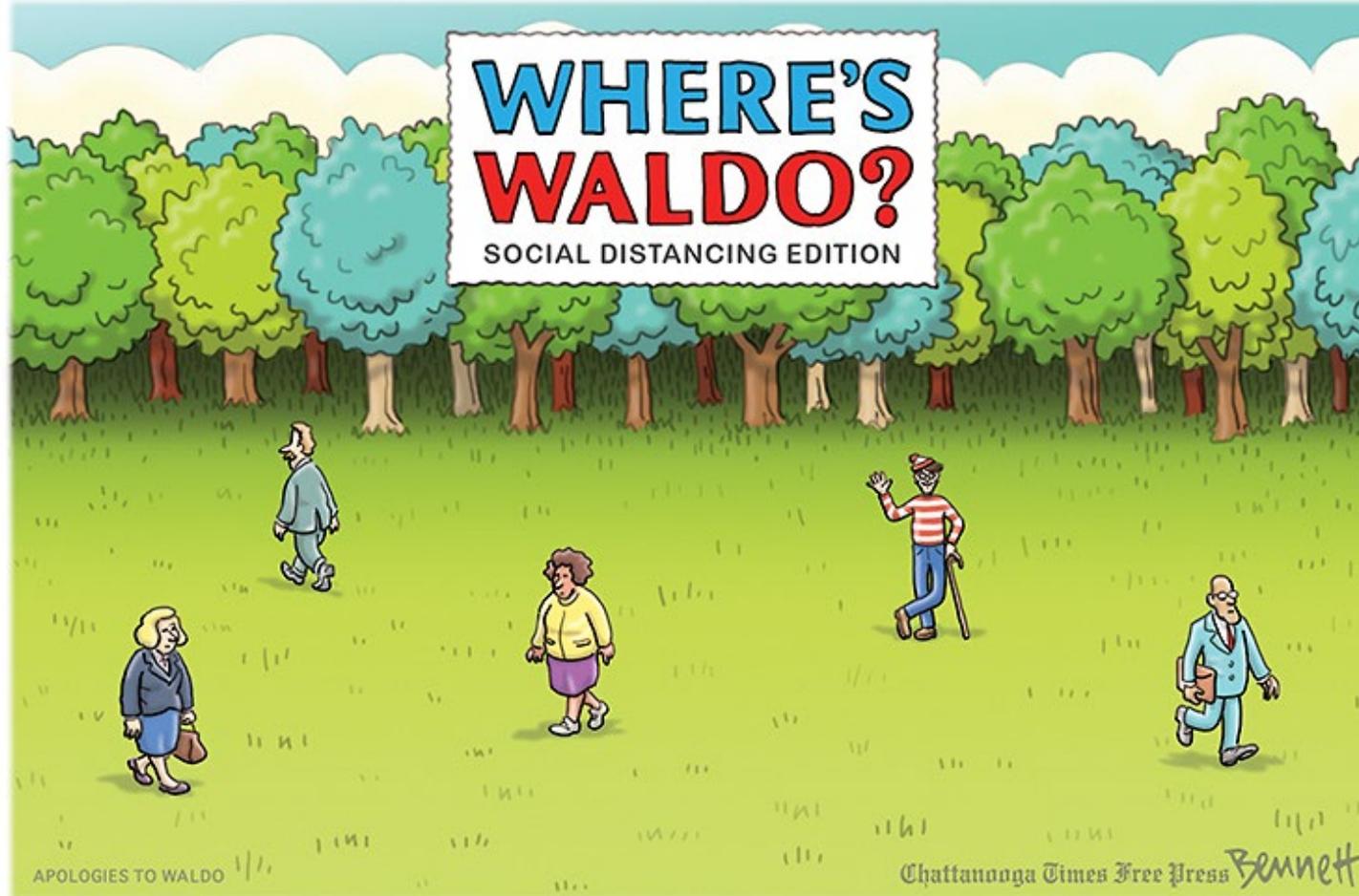


Documentation Minute: “Location” for Progress Notes

July 16, 2020

Lisa Nosal, LMFT
Utilization Review Manager

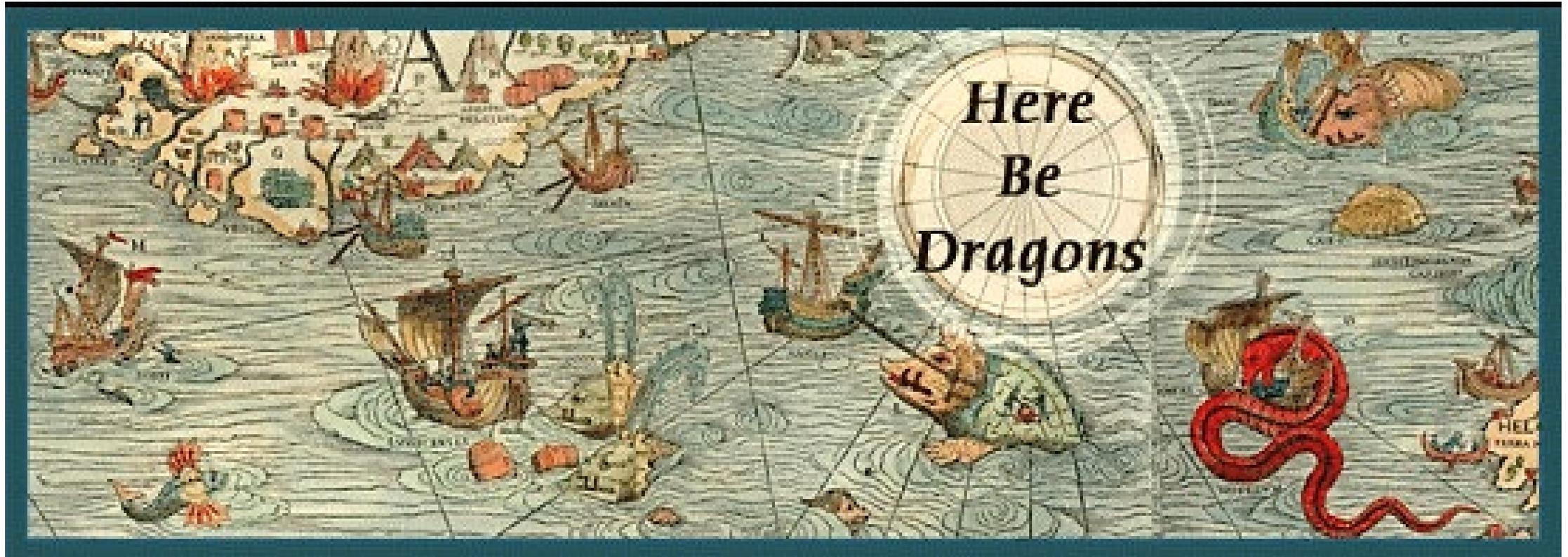
Where am I?



Least Restrictive Setting

- “Rehabilitative Mental Health Services are to be provided in the least restrictive setting, consistent with the goals of recovery and resiliency, the requirements for learning and development, and/or independent living and enhanced self-sufficiency. Mental Health Services, Crisis Intervention, TCM and Medication Support may be provided face-to-face, by telephone, or by telemedicine with the beneficiary or significant support person and may be provided anywhere in the community.”
- “It is not necessary to document the reason for providing services in a location other than a clinic setting, e.g., at a beneficiary’s home, in a park setting, in a vehicle. Services should be provided in the least restrictive setting.”

Where did the service *actually* take place?



If it took place in a wire or in a cable: “Telephone” or “Telehealth”

- These two locations “win,” regardless of where the phone or computer is located.
- **Telephone**
 - Two-way real-time audio only connection
- **Telehealth**
 - Two-way real-time audio and video connection
- Phone messages and texting should use the “phone” location (but cannot be billed – use NPC or FSP if appropriate)



If it took place at your desk or in the same building or campus as your desk: “Office”

- Face-to-face services in an office that routinely provides specialty mental health services (Medi-Cal certified SCBH and CBO sites)
- Non-interactive services completed in an office that routinely provides specialty mental health services, e.g.:
 - Referral paperwork at your desk
 - Chart review at your desk

If you are working from home: “Field”



- Your home is not a Medi-Cal certified site.
- You are officially “in the field.”
- Use “field” for any work done at home that’s not on a telephone or via telehealth.

If you are physically at CSU:

- Crisis Stabilization

X PES

X Don't use. Removed!

If you are physically at a hospital:

- Health Clinic/ER/Medical Hospital
 - Includes Emergency Department if you are waiting for a clearance for CSU or psychiatric hospitalization
- Inpatient Psychiatric Facility
 - Psychiatric hospital
 - Marin General psychiatric department, Aurora, Jewish Home, etc.

X Sutter

X Don't use. Removed!

If you are physically present at any of these locations:

- Homeless Shelter or Emergency Shelter
- Jail/Juvenile Hall
- School
 - Any facility that has the primary purpose of education

If you are where the client is living:

- Residential Care-Adults
 - 18 years and older
 - Residential treatment facility
 - Includes IMDs, SNFs, social rehab facilities (e.g., A Step Up)
- Residential Care-Children
 - Under 18 years old
 - Residential treatment facility
 - Includes group homes, social rehab facilities, and SNFs
- Home
 - Private residences
 - Includes Board & Cares and Room & Boards

If you are anywhere else: “Field”



Decision Tree

1. Am I on the phone? If yes, “phone.”
2. If not, am I using a video screen to talk with another person? If yes, “telehealth.”
3. If not, am I working from home without interacting with the client? If yes, “field.”
4. If none of the above, **where am I?**



Questions?

For documentation questions going forward, please email:

BHQA@sonoma-county.org

(That way both Lisa and Marcia can answer!)