

Initial Health Assessment Training for Providers

What is an Initial Health Assessment?

An initial health assessment (IHA) is a comprehensive assessment completed during a patient's initial encounter(s) with his/her PCP. California Department of Health Care Services (DHCS), Managed Risk Medical Insurance Board (MRMIB), and the Centers for Medicare & Medicaid Services (CMS) requires that all newly enrolled HPSM members receive an IHA within 120 days of becoming a member.

DHCS expects 100% participation from all providers. HPSM encourages providers to use the DHCS Policy Letter 13-001 as a guide for implementing the requirements as mandated. The policy letter can be found at: <http://www.dhcs.ca.gov/formsandpubs/Documents/MMCDAPLsandPolicyLetters/PL2013/PL13-001.pdf>

Health Plan of San Mateo requires its contracted providers to schedule an IHA visit with all new members on your panel list. This office visit helps establish care with your patient and to understand the patient's medical history to assess for any specific needs. If you are unable to reach the member, good faith effort attempts to contact the member must be documented in the member's medical record.

What are the components of an IHA?

The IHA consists of a comprehensive history, physical, and mental status. In addition, where age appropriate, a developmental exam, diagnosis and plan of care, preventive services and the Staying Healthy Assessment (SHA) are also required. A SHA is a standardized form used by all managed care plans to streamline the Individual Health Education Behavioral Assessment (IHEBA). All SHA forms are available for download from: www.hpsm.org

The Staying Healthy Assessment Tool (SHA) assists PCPs in:

- identifying and tracking individual health risks and behaviors
- targeting health education counseling interventions
- providing referral and follow-up.

The SHA is required to become a permanent part of the member's medical record and must be referred to **annually**. When potentially high risk health behaviors are identified, PCPs are expected to ask appropriate follow-up assessment questions to identify patient's health education needs and facilitate focused educational counseling that addresses health behavior changes.

Where to find out your panel list to begin outreach?

A case management list is updated at the beginning of each month with all current and new members added onto your panel. You can view your panel and download your case management list by logging into eReports: reports.hpsm.org using the name and password provided. The eReports login can also be found at www.hpsm.org/ereports-portal

- New members are identified on the top of your case management list with an asterisk.*

If you are having trouble accessing your panel, please call Provider Services at **650-616-2106** or email psinquires@hpsm.org.

