

# Care Coordination Record Tool

Effective Date: May 13, 2025



## Initial Assessment

### Question

- 01 An initial primary treatment diagnosis is present in the record.
- 02 A medical history and/or physical exam (appropriate to the level of care) is in the record.
- 03 Was a current medical condition identified? This is a non-scored question.
- 04 If a medical condition was identified, there is documentation that communication/collaboration with the treating medical clinician occurred. This is a non-scored question.
- 05 If a medical condition was identified, there is documentation that the member/guardian refused consent for the release of information to the treating medical clinician. This is a non-scored question.
- 06 The initial screen includes an assessment for depression.
- 07 For patients 12 and older, a substance abuse screening occurs. Documentation includes past and present use of alcohol and/or illicit drugs as well as prescription and over-the-counter medications.
- 08 For patients 12 and older, the substance abuse screening includes documentation of past and present use of nicotine.
- 09 If the screening indicates an active alcohol or substance use problem, there is documentation that an intervention for substance abuse/dependence occurred.
- 10 The substance identified as being misused was alcohol. This is a non-scored question.
- 11 The substance(s) identified as being misused were substance(s) other than alcohol. This is a non-scored question.
- 12 The substance(s) identified as being misused were alcohol and other substance(s). This is a non-scored question.

## Coordination of Care

### Question

- 13 Does the patient have a medical physician (PCP)? This is a non-scored question.
- 14 The record documents that the patient was asked whether they have a PCP. Y or N Only
- 15 If the patient has a PCP there is documentation that communication/collaboration occurred.
- 16 If the patient has a PCP, there is documentation that the patient/guardian refused consent for the release of information to the PCP.
- 17 Is the patient being seen by another behavioral health clinician (e.g. psychiatrist and social worker, psychologist and substance abuse counselor). This is a non-scored question.
- 18 The record documents that the patient was asked whether they are being seen by another behavioral health clinician. Y or N Only
- 19 If the patient is being seen by another behavioral health clinician, there is documentation that communication/collaboration occurred.
- 20 If the patient is being seen by another behavioral health clinician, there is documentation that the patient/guardian refused consent for the release of information to the behavioral health clinician.
- 21 When a primary care physician is identified, there is evidence the prescriber coordinated care within 14 calendar days after initiation of a new medication. This is a non-scored question.

## Discharge and Transfer

#### Question

- 22 Was the patient transferred/discharged to another clinician or program? This is a non-scored question.
- 23 If the patient was transferred/discharged to another clinician or program, there is documentation that communication/collaboration occurred with the receiving clinician/program.
- 24 If the patient was transferred/discharged to another clinician or program, there is documentation that the patient/guardian refused consent for release of information to the receiving clinician/program.

### California Specific

#### Question

- 25 For California Only: For patients in childbearing years (15 to 44), a screening occurred to determine current pregnancy or pregnancy in the previous 12 months. This is a non-scored question.
- 26 For California Only: For patients who are currently pregnant or have been pregnant in the previous 12 months, an initial screening for depression was completed. This is a non-scored question.
- 27 For California Only: For patients who are currently pregnant or have been pregnant in the previous 12 months, if the initial screening indicates depression, treatment and/or referrals were offered. This is a non-scored question.
- 28 For California Only: For patients who have been pregnant in the previous 12 months, an additional screening for depression was completed during the first six (6) weeks of postpartum. This is a non-scored question.
- 29 For California Only: For patients who have passed the first six weeks of the postpartum and/or had additional postpartum screenings, as determined to be medically necessary and clinically appropriate. The subsequent screenings indicates depression, treatment and/or referrals were offered. This is a non-scored question.