



QRTIPS

Health Care Agency • Behavioral Health Services • CYS Quality, Review & Training

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Assessment services, as defined in the EPSDT Documentation Manual, are those that assist in establishing “Medical Necessity” for mental health services or involve stabilization of emergency situations (e.g., crisis intervention services).

Some examples of Assessment activities BILLABLE to Medi-Cal:

- Initial Assessment – Gathering background information (family history, symptoms, problem behaviors, impairments, etc.) from the client, parents, legal guardians, teacher, or other prominent individuals involved in the client’s treatment, used to establish “medical necessity” and complete the 30/60-day assessment paperwork and client service plan (CSP).
- 6 Month Assessment Update, which includes completing all of the following activities:
 1. Documenting in a progress note the client’s overall progress towards reaching their treatment goals and individual milestones, as specified in the CSP. If no progress has occurred then documentation is needed to explain why not and/or what changes in treatment will occur.
 2. Completing the “Progress Update Section” on the CSP, indicating the progress or lack of progress thus far in treatment towards each of the client’s objectives/milestones.
 3. Completion of the “6 Month Update” section on the Master Treatment Plan (MTP). Any changes in client services and/or DSM diagnoses should be indicated here and signed/dated by the clinician.
- Annual Assessment – Gathering updated information regarding the client’s treatment progress, changes in the client’s status or situation since the previous assessment, and progress or lack thereof toward the client’s treatment goals and milestones, in order to establish continued “medical necessity” for ongoing services. Completion of the annual assessment paperwork, MSE, MTP, and CSP are all billable to Medi-Cal as assessment services, so long as those activities are completed prior to the end of the last month of the current authorized treatment period.
- Treatment Plan/CSP Review – Meeting with the client and/or the client’s legal guardian in order to collaboratively create the CSP, review and/or revise the CSP treatment goals and milestones to suit the client, and to ultimately obtain the client or legal guardian’s signature indicating their agreement with the service plan is always billable as an Assessment activity.
- Psychological Assessment – Collection of the background data and demographic information prior to administration of psychological testing often necessary for the test administrator to interpret the test results in proper context. However, the actual administration and interpretation of the tests is accurately billed as “psych testing.”