



SAN MATEO COUNTY HEALTH  
**BEHAVIORAL HEALTH  
 & RECOVERY SERVICES**

**SAN MATEO COUNTY BHRS  
 INDEX OF CURRENT POLICIES & PROCEDURES  
 December 21, 2023**

POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#"><u>88</u></a>	<b>Roger S. Procedures: Admission of Minors to County and County Contract Facilities</b>	2/88	
<a href="#"><u>89</u></a>	<b>Reise Case – Patient Right to Refuse Medication</b>	7/7/89	
<a href="#"><u>90-01</u></a>	<b>Services to 180-Day Post-Certification Clients</b>	8/2/90	Technical Edits 1/10 <b>Supersedes:</b> Policy of 10/19/87
<a href="#"><u>90-02</u></a>	<b>Admission Policy for Clients on 180-Day Post-Certifications Referred to Cordilleras</b>	7/1/90	<b>Supersedes:</b> Policy of 4/25/90
<a href="#"><u>90-07</u></a>	<b>Abnormal Involuntary Movement Screening</b> <i>(Formerly: Tardive Dyskinesia Screening Program)</i> Attachment: Abnormal Involuntary Movement Scale (AIMS)	9/25/90	Amended 12/31/97, 9/23/98, 11/14/12; Renamed 11/14/12
<a href="#"><u>90-08</u></a>	<b>Management of Threatening and Potentially Violent Behavior</b> <i>(Formerly: Potentially Violent Client)</i> Attachment A: Protocol: Management of Threatening and Potentially Violent Behavior	5/90	Amended 4/9/08, 3/31/17; Protocol – Offsite Services: obsoleted 3/31/17 Attach A: added 3/31/17 <b>Supersedes:</b> Policy of 9/87
<a href="#"><u>90-09</u></a>	<b>5150 Designated Facilities</b>	11/15/90	Amended 6/28/17, 1/23/18



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<a href="#">91-17</a>	<b>Referral Standards – County or County Contract 24-hour Treatment Facilities</b>	11/19/91	
<a href="#">91-19</a>	<b>Dispensing of Prescription Drugs by Registered Nurses</b>	11/25/91	Amended 10/4/09, 1/2011, 1/2012; Technical Edits 8/31/17 Attachment: obsolete 8/31/17
<a href="#">92-01</a>	<b>Discharge Procedures from Acute Inpatient Provider to Community Providers</b>	3/17/92	Amended 4/24/92
<a href="#">92-02</a>	<b>Admission Policy for Clients with Criminal Justice Involvement</b>	5/21/92	<b>Supersedes:</b> Policy of 11/22/88
<a href="#">92-03</a>	<b>Affirmative Action</b>	5/20/92	
<a href="#">92-04</a>	<b>Medi-Cal Share of Cost</b>	9/1/92	
<a href="#">92-12</a>	<b>Psychiatric Utilization Management Committee</b> Attachment: IMD and State Hospital Placement and Review Protocol	10/20/92	<b>Supersedes:</b> Policy of 4/98, 91-06
<a href="#">92-13</a>	<b>Representative Payee Acceptance Criteria</b>	12/18/92	Amended 8/6/99, 11/15/01
<a href="#">92-14</a>	<b>Tuberculin Skin Testing (TST) and Referrals</b> Attachment A: Diagnosis of Latent TB Infection (LTBI) Attachment B: Confidential Morbidity Report	12/31/92	Amended 1/19/98, 3/25/02, 10/28/15 Attachment A: amended 10/28/15
<a href="#">93-03</a>	<b>Initiating Temporary LPS Conservatorship</b> Attachment: Physician’s Declaration	6/10/93	
<a href="#">93-06</a>	<b>Psychiatry Residency Program and Procedure for Resolving Performance and Conduct Problems</b>	9/20/93	Amended 12/8/04, 1/14/15
<a href="#">93-07</a>	<b>72 Hour Hold/5150 Policies Procedures</b> <i>(Formerly: 5150 Procedures)</i> Attachment: Application for 72 Hour Detention Evaluation and Treatment (DHCS 1801)	9/7/93	Amended 3/10/00; Technical Edits 12/13/17; Amended 6/27/18; Renamed 6/27/18
<a href="#">93-08</a>	<b>Duty to Protect and Duty to Warn Potential Victims (Tarasoff V. Regents of the University of California)</b>	9/8/93	Amended 12/8/04, 3/13/13, 6/27/18; Renamed 6/27/18



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	<i>(Formerly: Duty to Warn Potential Victims)</i>		Attachment: obsoleted 6/27/18
<a href="#">93-10</a>	<b>Practice Standards (Scope of Practice)</b> Attachment: Scope of Practice	12/13/93	Amended 10/29/98, 3/9/05; Technical Edits 2/10/10 Attachment: amended 3/05
<a href="#">93-11</a>	<b>Critical Incident Reporting</b> Attachment A: Critical Incident Report Form Attachment B: Breach Reporting Decision Tree	12/24/93	Amended 1/24/02, 11/15/02, 11/14/12, 12/8/16, 6/7/17, 8/31/17; Technical Edit 11/18/19 Attachment A: amended 12/8/16, 6/7/17 Attachment B: amended 12/8/16
<a href="#">93-12</a>	<b>Client Referrals</b> Attachment: Self Team Referral	12/24/93	Amended 5/30/02 <b>Supersedes:</b> Policy of 12/1/85
<a href="#">93-13</a>	<b>Restricted Material in the Client Chart</b> <i>(Formerly: Chart Organization)</i>	12/21/93	Amended 12/20/99, 11/9/11 Attachment: obsoleted 11/9/11
<a href="#">94-03</a>	<b>Peer Review</b> Attachment: Peer Review Form	3/8/94	Amended 1/12/00 Attachment: amended 4/02
<a href="#">94-04</a>	<b>Psychiatry Residency Training Program – Moonlighting Regulations</b>	9/16/94	Amended 12/8/04, 7/25/05, 9/18/20
<a href="#">94-06</a>	<b>Determining Responsibility for Involuntary Treatment and Out-of-County Services</b> Attachment: The Greater Bay Area Mental Health Directors’ Policy for Determining Responsibility for the Provision of Involuntary Treatment of Out-of-County Services	11/17/94	<b>Supersedes:</b> 91-13
<a href="#">95-02</a>	<b>Research Policies and Procedures</b>	3/3/95	Amended 2/25/03, 12/16/15 Attachment B: amended 3/00 <b>Supersedes:</b> 90-11



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<a href="#">95-04</a>	<b>Practice Standards: Community Workers, Residential Counselors and Behavioral Health Counselors</b>	7/7/95	Amended 8/3/99, 4/14/10
<a href="#">95-05</a>	<b>Weapons Management</b> Attachment: Voluntary Relinquishment of Firearm or Other Deadly Weapon	8/8/95	Amended 2/15/05; Technical Edits 1/11
<a href="#">95-06</a>	<b>Blood Withdrawal by Community Mental Health Nurses</b> Attachment: Documentation of Competency to Withdrawal Blood	7/12/95	
<a href="#">95-07</a>	<b>Charting and Medication Guideline</b> Attachment: Medication Monitoring Checklist	10/11/95	Amended 9/23/98, 8/12/05, 11/7/06, 2/11; Technical Edits 5/23/19 Attachment: amended 11/02 Site Specific Protocol: added 5/23/19
<a href="#">95-08</a>	<b>Urine Toxicology Screening</b> Attachment: Urine Toxicology Screening Agreement	10/26/95	Amended 12/12/96, 2/15/05 Attachment: amended 2/97, 2/15/05
<a href="#">96-01</a>	<b>Volunteers, Students and Trainees</b>	4/5/96	Amended 1/11/99, 1/15/04, 5/8/13 Attachment: obsoleted 5/8/13
<a href="#">96-03</a>	<b>Press/Media Contacts</b>	5/9/96	Technical Edits 8/10
<a href="#">96-04</a>	<b>Use of Letterhead</b>	5/9/96	Technical Edits 8/10
<a href="#">96-06</a>	<b>Education Leave/Training Guidelines</b> Attachment A: Request for Educational Leave with Pay Attachment B&C: Request for Tuition Reimbursement Attachment D: request for Reimbursement for Professional Dues, Fees, CME or CEU Courses or Clinical Training Materials Attachment E: Educational Leave/Training Guidelines	12/30/96	Amended 2/10/99, 5/1/01, 8/30/03, 2/15/05, 2/14/08, 6/9/10 <b>Supersedes:</b> 91-03
<a href="#">96-09</a>	<b>Ambulance Transportation</b> Attachment: Destination of Patients Under 5150 Hold (Facilities – 5)	7/24/96	Amended 9/8/04 <b>Supersedes:</b> 91-07
<a href="#">96-10</a>	<b>Graduate Trainee Curriculum</b> Attachment: Graduate Trainee Curriculum	9/16/96	Amended 9/17/97, 8/22/05 Attachment: amended 8/05



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			<b>Supersedes:</b> 94-02
<a href="#">96-11</a>	<b>ACCESS Team – Staffing Requirements</b>	10/11/96	Amended 5/16/97
<a href="#">96-13</a>	<b>Court Testimony by Psychiatrists</b> Attachment: Psychiatrist Assigned to Testify in Court in the Absence of a Psychiatrist	10/23/96	Amended 6/14/12
<a href="#">96-14</a>	<b>Subpoenas to Release Records</b> Attachment A: Subpoena Review Checklist Attachment B: Sample Cover Letter for Forwarding Records per Appropriate Subpoena and Release Attachment C: Sample Letter When No Release Accompanies Subpoena and All Documents are Being Returned Attachment D: Sample Letter for Returning Subpoena Previously Responded To	10/11/96	Amended 5/1/06 <b>Supersedes:</b> Policy of 2/2/89
<a href="#">96-15</a>	<b>Application for Services and Consent to Treatment</b> Attachment A: Application for Services and Consent to Treatment with Acknowledgement of Receipt of Notice of Privacy Practices (English, Spanish, Tagalog, Tongan) Attachment B: Minor Client Legal Status and Implications for Consent Attachment C: Clinical Summary for GGRS Clients Mentally Incapable of Giving Consent	11/13/96	Amended 12/10/03, 12/10/08, 12/9/09
<a href="#">97-02</a>	<b>Committee Structure – Policy</b>	3/3/97	Amended 9/15/05 <b>Supersedes:</b> 92-07
<a href="#">97-03</a>	<b>Committee Structure – Advisory</b>	2/6/97	<b>Supersedes:</b> 92-08
<a href="#">97-04</a>	<b>Regional Medical Chief’s Role and Function</b>	4/9/97	<b>Supersedes:</b> Memo Dated 7/30/87
<a href="#">97-05</a>	<b>72-Hour Holds – Authorization to Write</b>	5/13/97	Amended 4/9/08, 9/19/18, 10/1/21



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	Attachment: Sample Identification Card		<b>Supersedes:</b> 91-14, 91-15, 91-16
<a href="#">97-06</a>	<b>Contracts, Requests for Proposals (RFP), and Waivers of RFP Process</b> Attachment A: Contracting Methodologies Attachment B: Contemplative Award Process Attachment C: RFP Calendar for Mental Health Contractors Attachment D: Public Notices	5/20/97	Amended 3/13/00
<a href="#">97-09</a>	<b>Urgent Care Messages</b>	8/4/97	
<a href="#">97-10</a>	<b>Behavioral Health Nurse Practitioner Protocols</b> Attachment A: Behavioral Health Nurse Practitioner Procedure Attachment B: Behavioral Health Nurse Practitioner Drug Procedure	9/9/97	Amended 4/17/02, 5/8/13, 5/22/15 Attachment A: amended 5/22/15 Attachment B: amended 5/8/13
<a href="#">97-11</a>	<b>Absence from State for More than 60 days</b>	10/20/97	
<a href="#">98-01</a>	<b>Change of Clinician/Provider Request, Including Charitable Choice</b> Attachment A: Request for Change of Provider – English Attachment B: Request for Change of Provider – Spanish Attachment C: Request for Change of Provider – Tagalog Attachment D: Request for Change of Provider – Chinese Attachment E: SPPN Treatment Plan Updated Form Attachment F: BHRS Consumer Rights and Problem Resolution Poster-English Attachment G: BHRS Consumer Rights and Problem Resolution Poster-Spanish Attachment H: BHRS Consumer Rights and Problem Resolution Poster-Chinese Attachment I: BHRS Consumer Rights and Problem Resolution Poster-Tagalog Attachment J: BHRS Consumer Rights and Problem Resolution Poster-Russian	2/3/98	Technical Edits 8/10, 1/9/13, 2/5/16; Amended name & content 10/10/23; QM contact updated in attachments 10/22/19; Attach A: revised 1/14, 2/16, 10/22/19, 10/10/23; Attach B: revised 1/14, 2/16, 10/22/19, 10/10/23; Attach C: revised 1/13, 4/16, 10/22/19, 10/10/23; Attach D: translated 4/16, revised 10/10/23; Attachment E-J added 10/10/23 <b>Supersedes:</b> AOD 2014-11
<a href="#">98-02</a>	<b>Voluntary Time Off (VTO)</b>	1/21/98	Amended 6/10/99, 10/12/05, 11/14/07, 8/13/08, 12/9/09, 5/3/17, 5/12/20, 5/4/23



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<a href="#">98-04</a>	<b>Outpatient Referrals – Share of Cost</b>	1/13/98	<b>Renumbering of:</b> 95-02
<a href="#">98-05</a>	<b>Credentialing for Independent Contracted Providers</b> Attachment: Provider Standards Attestation Form	1/13/98	Renamed 7/28/16; Amended 2/16/04, 12/14/05, 3/13/13, 7/28/16, 11/30/16; Technical Edits 10/15/19, 1/16/20 Attachment A: Added 10/15/19 <b>Renumbering of:</b> 95-01
<a href="#">98-10</a>	<b>Concerns/Complaints about MHP Individual and Organizational Contract Providers</b>	1/13/98	Amended and re-dated 7/16/98; Amended 10/14/09; Technical Edits 1/23/13 <b>Renumbering of:</b> 96-04
<a href="#">98-11</a>	<b>Quality Management Compliance Review of Outpatient Private Providers</b> Attachment A: Private Provider Site and Chart Review Checklist <i>(Formerly: Quality Improvement Compliance Review of Outpatient Provider Services)</i>	1/13/98	Amended 1/9/13, 7/31/15 Attachments Revised: 5/06 Attachments A & B: combined 7/31/15 <b>Renumbering of:</b> 97-01
<a href="#">98-12</a>	<b>Agency Provider Certification – Medi-Cal</b> Attachment: Agency Provider Certification Review	4/3/98	Amended 12/10/08, 8/12/09
<a href="#">98-14</a>	<b>Fingerprinting of BHRS Providers</b> <i>(Formerly: Fingerprinting of Independent Contractors, Interns, Trainees, Peer Counselors and Others)</i>	4/21/98	Amended 12/16/98, 12/15/03, 2/10/10, 12/14/11; Renamed and Revised 1/8/20
<a href="#">98-15</a>	<b>Critical Referrals (between HPSM and MHP)</b>	7/21/98	
<a href="#">98-17</a>	<b>ADA Standards for Independent Professional Contractors</b>	5/19/98	
<a href="#">98-18</a>	<b>Psychological Testing – Referral Protocol</b> Attachment: Referral for Psychological Evaluation	10/7/98	Amended 12/8/10 Attachment: added 12/10





POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#">99-01</a>	<b>Services to Clients in Primary or Preferred Languages</b> Attachment A: Health System Policy A-25, Client's Right to Language Services Notification Policy Attachment B: Health System Policy A-26, No Use of Minors & Careful Use of Family for Interpretation Attachment C: Language Access Services Instructions Attachment D: Activity Record and Progress Notes 1-08	1/12/99	Amended 12/01, 12/05; Renamed and Amended 12/10/08; Renamed 5/25/16; Amended and Attachments links updated 3/22/19; Technical Edit 1/9/20, 1/20/21 Attachment: obsolete 12/10/08 Attachments A, B, C, D: added 12/10/08 Attachment D: revised 6/14/23, 8/16/23
<a href="#">99-02</a>	<b>Medication Authorization for Dependent Children</b> Attachment A: JV-220 Application Regarding Psychotropic Medication Attachment B: JV-220(A) Physician's Statement Attachment C: JV-220(B) Physician's Request to Continue Medication Attachment D: JV-221 Proof of Notice of Application Regarding Psychotropic Medication Attachment E: JV-222 Input on Application for Psychotropic Medication Attachment F: JV-223 Order on Application for Psychotropic Medication	1/12/99	Renamed and Revised with Attachments A-F added (JV 220a/b, 221, 222, 223) 1/30/17
<a href="#">99-03</a>	<b>Medication Room Management</b> Attachment A: Controlled Substance/Emergency Supply Record Attachment B: Medication Samples Log Attachment C: Sample Medication Label Attachment D: Record of Medication Storage and Removal for Destruction Attachment E: Medication Room Inspection Attachment F: Storage of Meds until Retrieval by Client Attachment G. Medical Waste Registration Application	1/14/99	Amended 11/25/02, 11/8/06, 2/13/08; Technical Edit 6/9/10, 2/11/20; Attachment D: revised 6/10 Attachment E: revised 4/13 Attachment F: added 11/06 Attachment G: added 2/08, replaced and renamed 2/11/20 Attachment H: added 2/08, replaced and renamed 2/11/20; Attachment I:





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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment H: Medical Waste Management Plan Attachment I: Stock Medication Order Form		added 2/08, replaced and renamed 2/11/20; <b>Supersedes:</b> 94-05
<a href="#">99-04</a>	<b>Waiver/registration in Lieu of License</b> Attachment A: request for Waiver of Licensure Attachment B: Notice of Professional Responsibility to Maintain Current Clinical License Attachment C: Procedures for Verification of Licenses and Registrations Attachment D: CA HHS DHCS Mental Health Professional Licensing Waiver Request	4/20/99	Amended 10/25/01, 2/15/05, 11/13/13, 12/19/22 Attachments A, B, C: revised 11/13 Attachment D: added 9/09, revised 6/13, 10/7/20 <b>Supersedes:</b> 91-11, 94-07, 96-02
<a href="#">99-06</a>	<b>Policies Originating with County Manager or Director of Health Services</b>	7/16/99	
<a href="#">99-07</a>	<b>Referral Procedures (Clinical) – Unique Circumstances</b> Attachment: Request for Referral for Unique Clinical Service	8/9/99	Attachment: revised 3/00
<a href="#">99-09</a>	<b>Private Provider Contracts – Language Capabilities</b>	1/14/99	Technical Edit 1/9/20
<a href="#">00-01</a>	<b>Human Immunodeficiency Virus (HIV) Infected Populations</b>	1/10/00	<b>Supersedes:</b> 92-05 and Addenda
<a href="#">00-02</a>	<b>Safety/Risk Management Committee</b> Attachment: BHRS IIPP; BHRS Infection Control Committee	1/12/00	Amended 11/8/11 Attachments A & B: revised 11/11 <b>Supersedes:</b> 91-20
<a href="#">00-03</a>	<b>Flexible Funds</b> Attachment A: Youth Flexible Funds Application Information Attachment B: Child-Youth Flexible Funds Request Authorization Form Attachment B1: Child-Youth NMT Flexible Funds Request Authorization Form Attachment C: Youth Transition, Adult/Older Adult Flexible Funds Application Information Attachment D: Youth Transition, Adult/Older Adult Flexible Funds Request Authorization Form Attachment E: Supplemental House Funds	3/25/00	Amended 2/25/05, 10/12/05 Attachment A: revised 1/05 Attachment B: revised 9/09, 2017 Attachment B1 added 3/14 Attachment C: revised 7/11 Attachment D: revised 2/07 Attachment E: revised 1/05 Attachment F: revised 10/05



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment F: House Assistance Fund Application Form Attachment G: Other Sources of Flexible Funds		
<a href="#">00-04</a>	<b>Chart (Medical Record) Management</b> <i>(Formerly: Chart Retention)</i>	1/7/00	Amended 2/25/03, Effective 4/14/03 <b>Supersedes:</b> Policy of 7/81
<a href="#">00-05</a>	<b>Electroconvulsive Therapy (ECT) Consent</b> Attachment A: DHCS Electroconvulsive Treatment (ECT), Informed Consent Form English (DHCS 1800 05/19); Spanish (DHCS 1800 05/19) Attachment B: DHCS Quarterly Report for Convulsive Treatments and Psychosurgery Administered (DHCS 1011 Revised 11/2022)	6/30/00	Amended 1/14/15, Amended and Renamed 10/12/23, Attachment A & B added 10-12-23 <b>Supersedes:</b> Policy 9/29/87
<a href="#">00-06</a>	<b>Client Access to Protected Health Information (PHI)</b> Attachment A: Request for Access to Protected Health Information (English, Spanish Tagalog) Attachment B: Log of Requests for Access to Protected Health Information	12/14/00	Amended 2/25/03; Effective 4/14/03; Amended 2/9/10, 1/22/11 <b>Supersedes:</b> Policy of 1/83
<a href="#">00-08</a>	<b>Psychiatry Residency Program, Institutional Organization and Commitment</b>	5/1/00	Amended 7/25/05, 5/9/12
<a href="#">00-10</a>	<b>Quality Assurance/Peer Review Cases in Which Death Has Resulted from Suicide, Homicide or Suspicious Causes</b> Attachment A: Psychiatric Autopsy Confidentiality Agreement Attachment B: Sample Letter to Coroner	10/6/00	<b>Supersedes:</b> 91-08, 94-01



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<a href="#"><u>01-03</u></a>	<p><b>Assaults on Clients: Suspected or Reported</b></p> <p>Attachment A: Dependent Adult or Elder Abuse Reporting Agreement (for Employees)</p> <p>Attachment B: Child Abuse Reporting Agreement (for Employees)</p> <p>Attachment C: Table – Mandated Reporting of Dependent Adult and Elder Abuse</p> <p>Attachment D: Emergency and Mandated Phone Numbers for Reporting Dependent Adult/Elder Abuse</p> <p>Attachment E: Police Phone Numbers for Reporting Purposes (Non-Emergency)</p> <p>Attachment F: Report of Suspected Dependent Adult/Elder Abuse</p> <p>Attachment G: Table – Mandated Reporting of Child Abuse</p> <p>Attachment H: Emergency and Mandated Phone Numbers for Reporting Child Abuse</p> <p>Attachment I: Report of Suspected Child Abuse</p> <p>Attachment J: Community Resources Crisis Lines</p> <p>Attachment K: Instructions for Residential Care Facilities</p>	3/22/01	7/7/03
<a href="#"><u>01-04</u></a>	<b>Trainees/Intern/resident Case Assignments and Service Agreements</b>	7/12/01	Amended 2/25/03, 6/13/07, 12/09, 5/9/12 Attachment A: revised 12/09



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			Attachment B: added 12/09, revised 9/12
<a href="#">01-06</a>	<b>Residency Program (Psychiatric) – Training Cases Open at Regional Clinics</b>	10/2/01	
<a href="#">01-08</a>	<b>Bilingual Salary Differential – Spanish and Tagalog Speaking Staff</b> Attachment: Bilingual Salary Form	1/24/02	Technical Edit 1/9/20
<a href="#">01-09</a>	<b>Shredding of Client Material – Confidentiality</b>	11/19/01	
<a href="#">02-01</a>	<b>Linkages Between Outpatient Clinics and Psychiatric Emergency Services (PES) about MH Clients Open to Region</b> Attachment A: Adult Regional Clinic/Specialty Team Unit Chief’s Phone and Fax Numbers Attachment B: Adult Regional Clinic/Specialty Team After Hours Phone Number Attachment C: Adult Outpatient Clinic/Specialty Team FAX of Client Information	8/20/02	<b>Supersedes:</b> 90-06
<a href="#">03-01</a>	<b>Confidentiality/Privacy of Protected Health Information (PHI)</b> Attachment A: Declaration of Notice of Confidentiality Attachment B: Authorization for Use or Disclosure of Health Information (Chinese, English, Russian, Spanish, Tagalog, Tongan) (Mental Health) Attachment C: Authorization for the Verbal Release of Client Information (Chinese, English, Russian, Spanish, Tagalog, Tongan) (Mental Health) Attachment D: Excerpts from W&I Code Attachment E: Privacy Complaint Form Attachment F: Exchange of Information: Principles and Definitions Attachment G: Guide to Sharing Attachment H: Authorization for Use or Disclosure of Protected Health Information (AOD Services Unit)	2/25/03	Amended 3/13/13; Tech Edits 1/23/14; Amended 5/15/20 Attachment B: revised 1/14, 9/26/16, 5/15/20, Tech Edit 6/23/20 Attachment C: revised 9/26/16, 5/15/20, Tech Edit 6/23/20 Attachment F & G: added 3/13 Attachment H: added 10/13; Tech Edit 7/1/20 Tagalog & Tongan translations to Attach B, C & H completed 1/14 <b>Supersedes:</b> 90-12
<a href="#">03-02</a>	<b>Notice of Privacy Practices</b>	2/25/03	Amended 12/09/09; Technical Edits 1/23/14; Translations added 9/16/16



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment A: Summary and Notice of Privacy Practices (English, Spanish, Tagalog, Tongan, Chinese, Russian) Attachment B: Application for Services and Consent to Treatment with Acknowledgement of Receipt of Notice of Privacy Policies (English, Spanish, Tagalog, Tongan, Chinese, Russian)		Attachment A: revised 1/09, 12/28/21; Attachment B: added 12/09; Technical Edits 3/13; Tongan translations completed 1/14, Tagalog and Chinese translations revised 10/19
<a href="#">03-04</a>	<b>Disclosure of Protected Health Information (PHI), Minimum Necessary</b> Attachment A: Minimum Necessary by Workforce Class Attachment B: Routine Requests and the Degree of Disclosure Allowed Attachment C: Management Information System (MIS) – Outline of Access by Function	2/25/03	Technical Edits 8/12/09; Amended 1/23/14 Attachments A, B & C: revised 1/14
<a href="#">03-05</a>	<b>Disclosure of Protected Health Information (PHI), Incidental</b> Attachment: Index of HIPAA Related Policies	2/18/03	Attachment revised 3/14
<a href="#">03-06</a>	<b>Disclosures of Protected Health Information (PHI) with Client Authorization</b>	2/25/03	Amended 8/12/09, 3/13/13; Technical Edits 6/23/20, 8/14/20 (attachments removed, link to policy 03-01 added)
<a href="#">03-07</a>	<b>Disclosure of Protected Health Information (PHI), Request or an Accounting</b> Attachment A: Request for Accounting Disclosures Attachment B: Response to Request for an Accounting of Disclosures Attachment C: Log of Accountable Disclosures	2/25/03	
<a href="#">03-08</a>	<b>Restrictions on Use or Disclosure of Protected Health Information (PHI), Client Request</b> Attachment A: Request for Special Restriction on Use or Disclosure of Protected Health Information	2/25/03	Technical Edits 1/23/14



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# BEHAVIORAL HEALTH & RECOVERY SERVICES

POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment B: Response to Request for Special Restriction on Use or Disclosure of Protected Health Information		
<a href="#"><u>03-09</u></a>	<b>Amendment of Protected Health Information (PHI), Client Request</b> Attachment A: Request to Amend Protected Health Information Attachment B: Response to Request to Amend Protected Health Information Attachment C: Statement of Disagreement/Request to Include Amendment Request and Denial with Future Disclosures Attachment D: Notification of Amendment to Protected Health Information	2/25/03	Amended 3/31/09; Technical Edits 1/23/14
<a href="#"><u>03-10</u></a>	<b>Psychotherapy Notes</b>	2/25/03	
<a href="#"><u>03-12</u></a>	<b>Client Insurance Information and Financial Participation</b> Attachment A: Uniform Method of Determining Ability to Pay (UMDAP) Fee Schedule and Asset Allowance Schedule Attachment B: Roles and Responsibilities for Client Information and Financial Screening Attachment C: San Mateo Health Guide to Payor Financial Information (PFI) Requirements Attachment D: Payer Financial Information Attachment E: What You Need to Know about Payment for Mental Health Services (English, Spanish) Attachment F: Therapeutic Fee Adjustment Request Forms	05/30/03	<b>Supersedes:</b> 96-05, 96-16, 97-08



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#">03-13</a>	<b>Eligibility for Planned (non-emergency) San Mateo County Mental Health Services for Individuals Who Have Private Insurance</b> Attachment: Summary Information for Consumers Regarding California’s Mental Health “Parity” Law	4/9/03	<b>Supersedes:</b> 98-06
<a href="#">03-15</a>	<b>Compliance Officer – Duties</b>	12/1/03	Amended 8/29/16; Technical Edit 1/25/22
<a href="#">03-16</a>	<b>Compliance and Delegation Oversight Committee</b> Attachment A: Compliance and Delegation Oversight Committee Charter	12/1/03	Renamed and Amended 8/29/16
<a href="#">03-17</a>	<b>Mental Health Managed Care Plan – HIPAA Compliance</b> Attachment: Index of HIPAA-Related Policies and Procedures	6/11/03	Attachment: revised 3/14
<a href="#">03-20</a>	<b>Organized Health Care Arrangement (OHCA)</b>	8/13/03	
<a href="#">04-04</a>	<b>Compliance Policy for Funded Services Provided by Members of the MHP Workforce</b>	2/16/04	
<a href="#">04-05</a>	<b>Compliance Improvement Hotline 1-650-573-2695</b> Attachment A: Compliance Improvement Hotline Poster Attachment B: Compliance Improvement Mousepad	12/16/04	Amended and Renamed 8/29/16 Attachment A & B: added 8/29/16
<a href="#">04-06</a>	<b>Pharmaceutical Company Representatives Access and Accountability</b> Attachment A: Pharmaceutical/Vendor Representative Registration Form Attachment B: Vendor Sponsored Activity Request	9/8/04	Amended 1/11/06, 9/14/11, 5/17/19 Attachments A & B: revised 9/14/11; 5/17/19
<a href="#">04-07</a>	<b>Advanced Health Care Directive</b>	5/25/04	Amended 6/2/14; Technical Edits 3/25/14, 1/30/17;





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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment A: Advance Health Care Directive Acknowledgement Form and Fact Sheet – English Attachment B: Advance Health Care Directive Acknowledgement Form and Fact Sheet – Spanish		Attachments A & B: revised 1/30/17; Attachment A: technical edits 4/21/17
<a href="#"><u>04-08</u></a>	<b>Medication Monitoring</b> Attachment: Medication Monitoring Checklist	5/14/04	Attachment: revised 11/02; Revised 1/11/17 <b>Supersedes:</b> Portions of 95-07
<a href="#"><u>05-01</u></a>	<b>Translation of Written Materials</b>	4/27/05	Amended 7/13/11; Technical Edit 1/9/20
<a href="#"><u>05-04</u></a>	<b>Transportation of Mental Health Clients; Use of County Car</b> Attachment: Adult Resource Management (ARM) Specific Transportation Protocol	4/18/05	Amended 9/12/07, 11/12/08, 9/12/12, 8/7/13; Attachment revised 1/23/14 <b>Supersedes:</b> Policy of 9/88
<a href="#"><u>05-05</u></a>	<b>BHRS Mental Health Admission Materials</b>	4/27/05	Renamed 5/26/16; Amended 3/26/14, 5/26/16; Technical edits 6/7/16, 1/9/20
<a href="#"><u>05-08</u></a>	<b>Adverse Events Reporting</b> Attachment: San Mateo County Ordinance 04272	9/15/05	
<a href="#"><u>06-02</u></a>	<b>Consumer and Family Member Stipends for Services to the Mental Health Plan</b> Attachment A: Consumer/Family Stipend Form (English) Attachment B: Consumer/Family Stipend Form (Spanish)	1/12/06	Amended 4/11/11; Technical Edits to Attachments 4/12/17 Attachment B: obsolete and replaced 4/12/17



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#">07-02</a>	<b>Outpatient Services to Beneficiaries of Other Counties</b>	7/11/07	Technical Edits 2/10
<a href="#">07-03</a>	<b>Reporting Lapses of Consciousness to County Health Officer</b>	10/10/07	
<a href="#">07-04</a>	<b>Claims Processing Guidelines and Procedures</b> Attachment A: Procedure for Preparing and Distributing EOP's Attachment B: Procedure for Receiving and Processing Claims from Providers Attachment C: Procedure for Processing Payable MHP Contractor Claims Attachment D: Procedure for Processing Denied MHP Claims Attachment E: Procedure for Investigating Pended Claims before Final EOP Run Attachment G: Procedure for Adjusting Overpaid and Underpaid Claims Attachment I: Procedure for Setting up Providers and Fee Schedules Attachment J: Procedure for Processing Non-Contractor Claims Attachment L: Procedure for Reimbursing Provider Claims for Telehealth and Phone Services Attachment M: Procedure for Identifying, Reporting, and Recovering Mental Health and Drug Medi-Cal Overpayments Attachment N: Procedure for System Maintenance	11/14/07	Amended 12/20/11; Technical Edit 2/2016, 1/2017, 7/1/18 Attach A: revised 12/20/11, 8/22 Attach B: revised 12/20/11, 8/22 Attach C: revised 12/20/11, 8/22 Attach D: revised 12/20/11, 8/22 Attach E: revised 12/20/11, 8/22 Attach F: revised 12/20/11; removed 8/22 Attach G: added 4/12; revised 8/22 Attach H: removed 8/22 Attach I: revised 8/22; 12/22 Attach J: added 7/1/18; revised 8/22 Attach K: added 8/2020; removed 8/22 Attach L: added 8/21; revised 8/22 Attach M: added 1/22 Attach N: added 10/21
<a href="#">08-01</a>	<b>Welcoming Framework</b>	2/13/08	
<a href="#">08-02</a>	<b>Policy Management, Development, and Approval Process</b> Attachment A: Policy Process Flowchart	4/9/08	Renamed and flowchart added 8/29/16; Amended 8/29/16
<a href="#">08-03</a>	<b>Practice Guidelines</b>	2/13/08	



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#"><u>09-01</u></a>	<b>Animal Assisted Therapy (AAT) and Animal Assisted Activities</b> Attachment A: AAT/AAA Session Preparation Checklist Attachment B: Application to Provide AAT and/or AAA	4/8/09	Amended 1/14/15; Policy and Attachments A & B amended 10/19/15
<a href="#"><u>10-01</u></a>	<b>Providing Services to Persons with Disabilities</b>	4/14/10	
<a href="#"><u>10-02</u></a>	<b>Medical Marijuana</b> Attachment A: Sample Medical Marijuana Treatment Agreement Attachment B: Sample Form to Request Medical Information from Prescribing Physician	8/11/10	
<a href="#"><u>10-03</u></a>	<b>Managing Client Risk on High Temperature Days</b>	10/12/10	
<a href="#"><u>11-01</u></a>	<b>Standards of Care in an Integrated Behavior Health System</b> Attachment A: Standards of Care for AOD Providers Attachment B: Assessment & Integration of Spiritual Interests of Clients in Their Recovery and Wellness	9/14/11	Attachment B: added 1/9/13 <b>Supersedes: 10-04</b>
<a href="#"><u>12-01</u></a>	<b>Social Media Policy</b>	9/12/12	
<a href="#"><u>12-03</u></a>	<b>Registered Sex Offenders (RSO)</b>	11/14/12	Attachment revised 3/13
<a href="#"><u>13-01</u></a>	<b>Deep Brain Stimulation (DBS)</b>	1/9/13	
<a href="#"><u>13-02</u></a>	<b>Petty Cash Procedures</b> Attachment A: Petty Cash Verification Sheet Attachment B: Petty Cash Replenishment Summary Attachment C: Sample Petty Cash Voucher Attachment D: Petty Cash Operating Procedure Checklist Attachment E: Petty Cash Policy Contacts	11/13/13	
<a href="#"><u>14-02</u></a>	<b>Family Inclusion Policy</b>	7/9/14	
<a href="#"><u>14-03</u></a>	<b>Selection of Evidence-Based and Community Defined Practices</b>	7/9/14	



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#"><u>15-01</u></a>	<b>Medication Assisted Treatment Guidelines for Adult Regional Clinics</b> Attachment A: Algorithm for Pharmacological Treatment to Reduce Heavy Alcohol Use	11/24/15	Amended 1/4/16
<a href="#"><u>16-01</u></a>	<b>Review and Closure of Inactive Mental Health Treatment Cases</b>	5/26/16	
<a href="#"><u>16-02</u></a>	<b>Standards and Code of Conduct</b>	8/29/16	Technical Edits 12/18/19
<a href="#"><u>16-03</u></a>	<b>BHRS Compliance Plan and Program</b> Attachment A: Message from the BHRS Director regarding the Compliance Program Attachment B: Compliance Plan and Program	8/29/16	Attachment B: Technical Edit 1/25/22
<a href="#"><u>16-05</u></a>	<b>Non-Retaliation and Non-Intimidation for Reporting Compliance Concerns</b>	8/29/16	
<a href="#"><u>16-06</u></a>	<b>Restrictions Guidelines: Compliance with the Substance Abuse Prevention and Treatment Block Grant (SAPTBG)</b>	6/20/16	<b>Supersedes:</b> AOD #2014-03
<a href="#"><u>16-07</u></a>	<b>Payment of Last Resort and Services to Individuals with Other Health Coverage (OHC): Compliance with the Substance Abuse Prevention and Treatment Block Grant (SAPTBG)</b>	6/20/16	<b>Supersedes:</b> AOD #2014-04
<a href="#"><u>16-08</u></a>	<b>Office of Management and Budgets (OMB) Circular A-133: Compliance with Substance Abuse Prevention and Treatment Block Grant (SAPTBG)</b>	6/20/16	
<a href="#"><u>16-09</u></a>	<b>Americans with Disabilities Act (ADA) Section 504, and Unruh Civil Rights Act: Compliance with Substance Abuse Prevention and Treatment Block Grant (SAPTBG)</b> Attachment A: Checklist for Accessibility: Alcohol and Drug Programs Attachment B: San Mateo County AOD Treatment Providers with Wheelchair Accessible Facilities	6/20/16	



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#"><u>16-10</u></a>	<b>Continuing Education for Alcohol and Other Drug Treatment Providers: Compliance with the Substance Abuse Prevention and Treatment Block Grant (SAPTBG) Restrictions and Guidelines</b>	9/28/16	
<a href="#"><u>16-11</u></a>	<b>Quality Improvement Committee</b>	8/8/16	Technical Edits 6/25/19
<a href="#"><u>16-12</u></a>	<b>Psychiatric Medication Consent for Adults and Youth</b> Attachment A: Psych Med Consent (English, Spanish, Tagalog, Chinese)	11/16/16	Attachment A: (Spanish) added 6/21/17; (Tagalog, Chinese) added 9/7/17
<a href="#"><u>17-01</u></a>	<b>Electronic Health Record (EHR) Security, Electronic Signatures and Terminations</b> Attachment A: DHCS; DMH Letter No: 08-10 Attachment B: eCC Electronic Signature Agreement Form Attachment C: Look Up Only Avatar Access Form Attachment D: Mental Health Contractors Avatar User Request Form Attachment E: AOD Contractors Avatar User Request Form Attachment F: Staff/Contractor Request to Block Access to Chart Form Attachment G: MH Contractor Credentialing Termination Attachment H: AOD Contractor Termination Attachment I: ADP Electronic Signature Agreement & Electronic Signature Certification Attachment J: ADP Bulletin No. 10-01	1/23/17	Amended 8/15/17, Technical Edits 1/10/20 Attachments I & J: added 8/15/17  Attachment D: revised 5/2023 Attachment E: revised 8/2023
<a href="#"><u>17-02</u></a>	<b>Delegation Oversight &amp; Audit Program</b> Attachment A: Contractor Attestation	2/9/17	Technical Edits 10/24/17, 12/21/17, 12/18/19; Attachment A: Technical Edits 12/18/19
<a href="#"><u>17-03</u></a>	<b>Access to Services for the Organized Delivery System (ODS) for Substance Use Disorder (SUD) Services</b>	8/15/17	Amended 3/22/19



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#">18-01</a>	<b>Cultural Humility, Equity and Inclusion Framework; Implementation of CLAS Standards</b> Attachment A: BHRS and Health System Policies Relevant to the National CLAS Standards.	2/22/18	Technical Edit 1/9/20 <b>Supersedes:</b> 14-01
<a href="#">18-02</a>	<b>Network Adequacy Standards and Timely Access for Mental Health (MHPs) and Drug Medi-Cal Organized Delivery System (DMC-ODS)</b> Attachment A: Assessment Date Tracking Form Attachment B: Assessment Date Tracking Flow Chart	3/27/18	Technical Edits 6/11/18, 11/7/18; Amended, name change, and attachments added 6/10/19; Amended 7/9/20 Attachment A: Technical Edits 6/26/19; 4/28/21; 6/4/21 Attachment B: Renamed and Technical Edit 6/19/19
<a href="#">18-03</a>	<b>Utilization Management Program</b> Attachment A: UM Decision Workflow for Call Center Attachment B: Affirmative Statement about Incentives	6/25/18	
<a href="#">18-04</a>	<b>Credentialing and Service/Billing Privileges for Mental Health Rehabilitation Specialists (MHRS)</b> Attachment A: MHRS Verification Form	9/19/18	
<a href="#">19-01</a>	<b>Consumer Problem Resolution and Notice of Adverse Benefits Determination Resolution System</b> Attachment A: Consumer Problem Resolution (Grievance) and Notice of Adverse Benefits Determination (NOABD) User Manual. Attachment B: NOABD Quick Guide (with FAQ) <i>(Formerly: Grievance and Appeals System Usage Matrix)</i> Attachments C – P: Various Templates for Notices of Adverse Benefits Determinations (NOABD) and Notices of Appeal/Grievance Resolutions Attachments Q: Language Taglines	6/21/19	Technical Edits and Translation Documents added 10/10/19; Technical Edit 1/9/20 Attachment A: Technical Edit 1/9/20; Amended 5/4/23 Attachment B: Technical Edit 3/12/21, 4/14/21 (Tech Edit and name change), 9/24/21 <b>Supersedes:</b> 04-10, 03-03



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment R: Beneficiary Non-Discrimination Notice Attachment S: Grievance and Appeals Resolution Poster, Attachment T: Grievance and Appeals Resolution Brochure		
<a href="#">19-02</a>	<b>Standard Pre-Service Organizational Determinations</b>	8/28/19	
<a href="#">19-03</a>	<b>Expedited Pre-Service Organizational Determinations</b>	8/28/19	
<a href="#">19-04</a>	<b>Utilization Management Program – Interrater Reliability Testing</b> Attachment A: Interrater Reliability Testing Protocol	9/11/19	
<a href="#">19-06</a>	<b>Provider Directory</b>	12/18/19	
<a href="#">19-07</a>	<b>Provider Selection and Retention</b>	12/31/19	<b>Supersedes:</b> 98-03, 98-07
<a href="#">19-08</a>	<b>Credentialing and Re-credentialing of Providers</b> Attachment A: Contractor Monthly Credentialing Verification Spreadsheet Attachment B: Attestation BHRS Staff and On-site Contractors Attachment C: Attestation Contractors Attachment D: Acknowledgement of Receipt of BHRS HIPAA Policies Attachment E: BHRS Form 700 – Contractor Agency Attachment F: Health Policy A-14 – Conflict of Interest, Incompatible Activities and Outside Employment for Employees of SMC Health Attachment G: Health Policy A-14 (Attach 1) Employee Statement Regarding Conflicts of Interest, Incompatible Activities and Outside Employment Attachment H: BHRS Attestation for Outside Employment for Health Policy A-14	12/31/19	Technical Edit 1/9/20, 11/5/20, 6/26/23 Attachment F: updated 6/7/21 Attachment G: updated 2/17/23 Attachment H: 6/26/23 <b>Supersedes:</b> 04-01, 04-02, 04-03, 98-16, 98-08, 98-09
<a href="#">20-01</a>	<b>Continuity of Care for Specialty Mental Health</b>	1/10/20	





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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#">20-02</a>	<b>Authorization of Adult Residential Services</b> Attachment A: Adult Residential Authorization Form Attachment B: Initial Adult Residential Community Program Referral Form Attachment C: Reauthorization Adult Residential Progress Summary	1/17/20	Attachment A: Technical edit 4/29/22
<a href="#">20-03</a>	<b>Presumptive Transfer</b> Attachment A: Referral Request for Presumptive Transfer Child in San Mateo County (AB1299)	1/9/20	
<a href="#">20-04</a>	<b>Authorization of Youth Specialty Mental Health Services (SMHS)</b> Attachment A: TBS Authorization Request Form Attachment B: TBS Service Authorization Request Form Attachment C: TBS Utilization Review Form Attachment D: TBS Authorization Extension Form Attachment E: TBS Assessment Authorization Attachment F: TBS Authorization Request Workflow	1/9/20	Attachments A, D, E: Technical Edit 2/18/21; Attachment F added 2/18/21
<a href="#">20-06</a>	<b>Utilization Management for Inpatient Psychiatric Services</b> Attachment A: Acknowledgement of Notification for Inpatient Admission Attachment B: List of Required Documentation for Concurrent Inpatient Reviews Attachment C: Acknowledgement of Notification/Non-Responsible	2/4/20	Technical Edit 2/24/20; Amended 11/5/20 Attachment A: Technical Edit 2/10/23 <b>Supersedes: 99-08, 00-09</b>
<a href="#">20-07</a>	<b>Medication Monitoring for Youth</b>	1/8/20	
<a href="#">20-08</a>	<b>Full Service Partnership</b>	5/11/20	
<a href="#">20-09</a>	<b>MHSA Administration and Components</b> Attachment: MHSA Steering Committee Roles and Responsibilities	6/4/20	Amended 10/15/21
<a href="#">20-10</a>	<b>MHSA Issue Resolution Process</b>	6/4/20	
<a href="#">20-11</a>	<b>COVID-19 Testing Policy</b>	11/12/20	
<a href="#">21-01</a>	<b>Assignment of On-Call Work for BHRS Staff</b>	5/12/21	Amended 10/6/22



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
<a href="#">21-02</a>	<b>Specialty Mental Health Service Provider Network (SPPN)</b>	10/28/21	
<a href="#">22-01</a>	<b>Criteria for Beneficiary Access to SMHS</b>	4/1/22	<b>Supersedes:</b> 19-05
<a href="#">22-02</a>	<b>DMC-ODS Requirements for the Period of 22-26</b>	4/1/22	
<a href="#">22-03</a>	<b>No Wong Door for Mental Health Services</b>	6/3/22	
<a href="#">22-04</a>	<b>Documentation Requirements for all SMHS, DMC, DMC-ODS Services</b>	6/9/22	<b>Supersedes:</b> 91-05, Memo 11-17, Memo 4/6/16
<a href="#">Memo 01-22</a>	<b>CANS and PSC-35 Implementation</b>	6/24/22	<b>Supersedes:</b> 01-18, 02-18, 03-18
<a href="#">22-05</a>	<b>BHRS Naloxone Policy</b>	9/15/22	
<a href="#">22-06</a>	<b>Electronic Communications Policy (General Guidelines)</b> Attachment A: Deidentifying Protected Health Information Attachment B: Protocol for E-mail Usage (for staff) Attachment C: Sending Secure Emails	10/14/22	<b>Supersedes:</b> 03-11, 01-01, 01-07
<a href="#">22-07</a>	<b>Electronic Communications Policy (Client Communication)</b> Attachment A: E-Communication Consent Form Attachment B: Standards of Practice for Telehealth Attachment C: Accessing Secure Platforms Attachment D: Staff Contact Information Worksheet Attachment E: Remote Services Protocol Checklist	10/14/22	Attachment E: added 1/9/23 <b>Supersedes:</b> 03-11, 01-01, 01-07
<a href="#">23-01</a>	<b>Adult and Youth Screening and Transition of Care Tools</b> DHCS 8765 A: The Adult Screening Tool for Medi-Cal Mental Health Services DHCS 8765 B: The Transition of Care Tools for Medi-Cal Mental Health Services DHCS 8765 C: The Youth Screening Tool For Medi-Cal Mental Health Services	1/11/23	Technical Edit 1/23/23
<a href="#">23-02</a>	<b>Utilization Management (UM) and Audit, Oversight, Recoupment Standards (SMHS)</b>		



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION
	Attachment A: CalMHSA SMHS UR/Audit Tool		
<a href="#"><u>23-03</u></a>	<b>Utilization Management (UM) and Audit, Oversight, Recoupment Standards for Substance Use Disorders (SUD)</b> Attachment A: CalMHSA SUD UR/Audit Tool		
<a href="#"><u>23-04</u></a>	<b>5150 Certification Review Hearings (AB 2275)</b> Attachment A: Contact Information Attachment B: Patient Rights Advisement Attachment C: Hearing Decision Form	1/1/2023	
<a href="#"><u>23-05</u></a>	<b>County Behavioral Health Intergovernmental Transfer (IGT)</b>	7/14/23	Technical Edit 8/25/23

<b>SAN MATEO COUNTY BHRS INACTIVE POLICIES</b>
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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION	SUPERSEDED BY	DATE SUPERSEDED
90-06	Coordination of Treatment Services	8/31/90		02-01	8/20/02
90-12	Confidentiality			03-01	2/25/03
91-02	Transfer of Monir Patients to Adult Psychiatric Units	1/11/91	Technical Edit 2/10	00-02	1/12/00
91-05	Compliance with Documentation Standards	4/21/91	Amended 2/11/04; Technical Edits 11/13/13, 1/23/14; Amended 5/1/16	22-04	6/9/22
91-07	5150 Procedure/Regional Override Attachment: Ambulance Override	8/23/91	Amended 8/1/96, 9/8/04	96-09	7/24/96
92-09	Adult and Older Adult Eligibility Criteria Attachment A: State Department of Mental Health Medical Necessity Criteria for Specialty Mental Health Services Attachment B: Criteria for Entry to Adult/Older Adult Behavioral Health Services	7/7/92	Renumbering of 96-01	19-05	11/20/19
96-07	Telecommuting Attachment A: SMC Telecommuting Policies Attachment B: Telecommuting Agreement Attachment C: Telecommuting Schedule	7/11/96		Telework Guide	6/21
96-08	Alternative (9/80) Work Schedule	7/11/96	Amended 8/13/08	01-02	7/3/01
96-12	Medical Necessity - Adults Receiving System of Care Services - Procedure for Reassessment	11/19/96		19-05	11/20/19
96-16	Procedures for Collecting Insurance Information from Clients			97-08	10/21/97
97-08	Client Financial Participation			03-12	5/30/03



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POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION	SUPERSEDED BY	DATE SUPERSEDED
98-03	Provider Contracts	1/13/98		19-07	12/31/19
98-06	Other Coverage	1/13/98		03-13	4/9/03
98-07	Provider Selection and Performance Criteria	1/13/98	Renumbering of 96-01 Amended 4/16/04	19-07	12/31/19
98-08	Credentialing Committee	1/13/98	Renumbering of 96-02	19-08	12/31/19
98-09	Delegation of Credentialing, Recredentialing, Recertification or Reappointment of Individual Practitioners	1/13/19	Renumbering of 96-03	19-08	12/31/19
98-16	Credentialing for County Licensed Professional Staff (Civil Service and Contract Employees)	5/18/98	Amended 12/29/00, 12/10/03, 2/15/05, 3/13/13, 11/13/13 Attachment revised 7/03	19-08	12/31/19
00-07	Authorization to Host	2/11/00	Amended 4/11/07, Technical Edit 7/9/14;	County Health Policy HS A-5	10/25/17
00-09	Inpatient Services to Medi-Cal Beneficiaries of Other Counties	7/14/00		20-06	2/4/20
01-01	Cell Phone Usage Attachment A: Client Acknowledgment Attachment B: Cell Phone Voicemail Greeting Script Attachment C: Spanish Client Acknowledgement Attachment D: Chinese Client Acknowledgement Attachment E: Tagalog Client Acknowledgement	2/1/00	Amended 1/13/17; Technical Edits 3/29/17, 9/26/17 Attachment C: added 3/29/17	22-06, 22-07	10/14/22



SAN MATEO COUNTY HEALTH

# BEHAVIORAL HEALTH & RECOVERY SERVICES

POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION	SUPERSEDED BY	DATE SUPERSEDED
			Attachment D and E: added 9/26/17		
01-02	<b>Flexible – Alternative Work Hours</b> Attachment: Proposal for Flexible/Alternative Schedule	7/3/01	Amended 8/13/08 <b>Supersedes:</b> 96-08	Memo E-9	9/21
01-07	<b>Facsimile (FAX) Confidentiality</b> Attachment: Sample Cover Sheet	10/17/01		22-06, 22-07	10/14/22
03-03	<b>Grievance and Appeal System</b> <i>(Formerly: Consumer Problem Resolution Process)</i>	2/25/03	Amended 7/25/05, 1/30/17, 12/15/17, 10/31/18	19-01	6/21/19
03-11	<b>E-mail Use</b> Attachment A: GroupWise Security Directions Attachment B: San Mateo County E-mail Policy Attachment C: Protocol for E-mail Usage Attachment D: Instructions for Use of Tumbleweed Encryption Process	2/25/03	Amended 3/14/07, 10/8/08; Attachments A and C: revised 9/08 Attachment B: revised 3/07 Attachment D: added 9/08	22-06, 22-07	10/14/22
04-01	<b>Compliance Policy for Funded Services Provided by Contracted Providers</b>	1/22/04	Amended 7/28/16, 2/14/17	19-08	12/31/19
04-02	<b>Employee on On-site Contractor Screening and Orientation</b>	1/15/04	Attachment revised 4/04; Amended 5/26/16, 11/30/16 (Policy and Attachments); Amended 1/10/17 (Attach A obsoleted	19-08	12/31/19



SAN MATEO COUNTY HEALTH

# BEHAVIORAL HEALTH & RECOVERY SERVICES

POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION	SUPERSEDED BY	DATE SUPERSEDED
			and Attach B became A)		
04-03	<b>New Professional Contractors, Screening and Orientation</b>	1/15/04	Attachment revised 4-04; Obsolete 5/26/16 (combined with 04-02)	19-08	12/31/19
04-09	<b>Authorization Standards – Managed Care</b>	5/17/04		20-05	1/9/20
04-10	<b>Notice of Action</b>	7/15/04	Amended 1/25/05; Attachments A through F revised 3/08	19-01	6/21/19
05-03	<b>Eligibility Criteria – Child, Youth</b> Attachment A: Medical Necessity Criteria for Specialty Mental Health Services Attachment B. Criteria for Entry to Child/Youth Services (was Attachment C)	7/25/05	Revised 1/13/17, Attachment B obsoleted and C became the new	19-05	11/20/19
05-06	<b>Clinical Forms</b>	2/25/05	Retired 8/1/19 (not superseded)		
06-01	<b>Diagnosis of Mental Health Disorders</b> Attachment A: DSM-IV to ICD-9 Cross Walk for Diagnoses Requiring Clinician Decision Attachment B: Notice of revised Diagnosis Attachment C: Medical Necessity Criteria for Specialty Mental Health Services	1/12/06	Retired 5/25/22 (not superseded)		
10-04	<b>Standards of Care in the Treatment of Substance Abuse Disorders</b>	10/13/10		11-01	9/14/11





SAN MATEO COUNTY HEALTH

# BEHAVIORAL HEALTH & RECOVERY SERVICES

POLICY #	POLICY NAME	ORIGINAL POLICY DATE	POLICY INFORMATION	SUPERSEDED BY	DATE SUPERSEDED
	Attachment A: Standards of Care for AOD/COD Providers Attachment B: Best Practices Resources for Behavioral Health				
19-05	<b>Medical Necessity Criteria for Specialty Mental Health Services</b>	11/20/19	<b>Supersedes:</b> 05-03, 92-09, 96-12 Attachment A: Added 4/27/21	22-01	4/1/22
14-01	<b>Implementation of Cultural Competency Standards</b>	7/9/14		18-01	2/22/18
Memo 4-6-16	<b>Assessment and Treatment Plan Timeline Changes</b>	4/6/16		22-04	6/9/22
Memo 11-17	<b>Chart Documentation Requirement Updates</b>	11/17/17		22-04	6/9/22
Memo 1-18	<b>CANS and PSC-35 Implementation: BHRS Staff</b>	9/21/18	Amended 10/31/18	Memo 03-18	12/14/18
Memo 02-18	<b>CANS and PSC-35 Implementation: MH Contractors</b>	9/21/18	Amended 10/31/18	Memo 03-18	12/14/18
Memo 03-18	<b>CANS and PSC-35 Implementation: All Providers</b>	12/14/18	<b>Supersedes:</b> Memo 1-18 and 2-18	Memo 01-22	6/24/22
20-05	<b>Utilization Management Program and Authorization of Specialty Mental Health Services</b>	1/9/20	Technical Edit 7/17/20; Amended 11/5/20 <b>Supersedes:</b> 04-09	23-02 23-03	1/31/23