

Access to Treatment Call Center Protocols

If someone is in crisis and needs immediate assistance:

- Signaling that you need assistance from another staff, ask the caller if you can put them on a brief hold, or email a supervisor that you need assistance.
- Either you or the person assisting you initiate a welfare check by calling county communications (755-####)
I usually say, hello my name is Amy, I am calling from Monterey County Behavioral Health, I would like to request a welfare check for a caller on the phone who is located in what city or address (they need this information early on so they know which agency they are dispatching). Then provide their name and other details if available. Be ready to describe the situation as much as possible, and be specific about the reason you are requesting the welfare check. They will always ask if the individual has weapons.
- Stay on the phone with the caller until law enforcement arrives.
- After you get off the phone let the crisis team know that you initiated a welfare check

What do to do with a caller:

- Ask the caller for their name, DOB, telephone number, and city. If it is a parent/guardian inquiring about services for a minor ask for the name and DOB of the minor.
- Ask the caller for their insurance provider (none, Medi Cal, Medi Care, Medi-Medi, and/or private)
- Find out what kind of information the caller is looking for.
- Knowing their insurance status you can let them know how to access care.
 - Medi Care only and private insurance, or private insurance and Medi-Cal need to be referred back to their insurance company.
- Medi Cal-Mild to Moderate-Refer to Beacon-inform caller of the referral and document their verbal consent to make the referral.
- Medi-Cal and Uninsured-Moderate to Severe
 - Peninsula and Salinas-consider a referral to The Village Project, USC, or Community Human Services
 - South County-consider a referral to USC
 - If you believe there will be any psychiatric needs then it is best for them to stay open to our Access programs.
 - For individuals who need to be scheduled for an assessment transfer the call to the PSR who will then schedule them for an assessment in their region.
- Conduct a brief risk assessment
- End the call by thanking the caller for their call and ask if they have any other questions or if they need clarification before ending the call.

What to Do in Avatar:

First you need to determine if this call was (1) clinical in nature or more (2) referral and information.

Clinical Calls

- Open an episode using the “Admission” form in Avatar.
- Open to the most appropriate regional Access team. If no city is indicated use Access To Treatment-Salinas as the default.

- Complete the CSI form.
- Complete the diagnosis form using Z03.89 as the diagnosis.
- Write a progress notes documenting the call, use billing code 336
 - Functioning-received call in the call center from individual seeking information about..... Caller was (mini MSE)...
 - Intervention-Assessed caller's needs, clarified what type of services they are looking for, completed a risk assessment.
 - Response-Document any verbal consents to complete referrals
 - Plan-caller referred to
- Complete the Notice of Adverse Benefit Determination (NOABD)/Beacon referral form if applicable
- Discharge episode once your note is completed if there are no future appointments scheduled.
- If you need an assessment scheduled for an assessment please ask the PSRs for assistance at this time.

Information and Referral Calls

- Open a Pre-Admission
 - If you do not have the callers last name use unknown as the last name.
- This does not require the CSI information or Diagnosis form
- Document the call using a similar FIRP style note as outlined above
- Discharge episode once your note is completed if there are no future appointments scheduled.

Third Party Callers

This can also be documented in a Pre-Admission episode