

	County of Sacramento Mental Health Division Adult Mental Health Services	Policy No.	04-03
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AREA: Medical Services	TITLE: Primary Care Physician Collaboration		
Approved By:	Approved By:		
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I. POLICY

Adult Mental Health Providers recognize the importance of collaboration with a client's designated primary care physician (PCPs) or health care specialist. The identification of medical conditions, establishing a PCP, and service coordination with a PCP and/or health care specialist are considered essential to quality care and are recognized as the standard of practice.

II. PROCEDURES

A. Program Admission:

1. New clients complete the Adult Health Questionnaire (AHQ) at admission. When indicated, staff provides assistance to ensure the form is completely filled out. The AHQ includes the name of PCP, the date of the last visit, and identifies any serious health conditions that require medical intervention. PCP contact information is also documented on the Adult Comprehensive Assessment Client Plan (ACP) in the Coordination of Care section.
2. If current health concerns are evident, staff refers the client to a PCP or the attending Psychiatrist for a physical examination and documents the referral in the progress notes.
3. Staff completes a release of information form and educates the client regarding the importance of treatment that includes collaboration with PCP. If client refuses to sign, the refusal is documented in the progress notes. For referral or treatment purposes, a release is not needed to communicate, per HIPAA regulations.

B. Client Education:

1. The client's psychiatrist, nurse and/or service coordinator educates the client on the importance of health care.
2. Staff should explore the client's health history as noted on the AHQ and ensure the client has medical, dental, vision care or other specialist as indicated.

3. Staff should also educate the client on the importance of providing information to each medical provider regarding current medical and psychiatric conditions and medications.

C. Clients not linked to a PCP:

1. Staff facilitates linkage for clients who do not have a current PCP. Any client who has not had a physical examination within the past year is assisted when indicated (e.g., transportation, reminders).
2. Medi-Cal eligible clients are provided with a list of physicians and clinics that accept Medi-Cal. If client declines assistance, the refusal is documented and staff provide supportive education regarding health care.
3. Medically Indigent clients are referred to the Sacramento County Department of Health and Human Services Primary Care Clinic (PCC) to establish eligibility for the County Medically Indigent Services Program (CMISP).
 - a. Staff provides the client with an eligibility packet and a “Medical Necessity Justifying Eligibility” form for CMISP and referred to the PCC. Staff provides supportive services, if needed (e.g. assistance with the application, reminders and transportation).
 - b. If client declines, the refusal is documented and staff provide supportive education regarding health care.

D. Clients Linked to a PCP and/or Specialist :

1. If a client has a PCP, staff sends the PCP an “introductory letter” signed by the attending psychiatrist (or designated Nurse Practitioner / Physician’s Assistant) and a “return information” letter to be completed by the PCP with a pre-addressed return envelope to begin collaboration. Consultation with the PCP may be substituted for the letter. The contents of the consultation including PCP information should be documented in a progress note.
2. Introductory Letter:

The introductory letter includes the following:

 - a. Client’s name and contact information
 - b. Psychiatric conditions being managed by psychiatrist, NP or PA
 - c. Other known medical conditions
 - d. Medications prescribed
 - e. Relevant information regarding course of treatment and current status
 - f. Psychiatrist contact information (e.g., pager, email, phone, fax and address)
 - g. Other important information and/or questions for the PCP
3. Return Letter:

- a. The return information letter requests the PCP to complete the medical diagnosis, medications prescribed, and other important information or answers to the questions from the psychiatrist.
- b. The completed return information letters are attached to the front of the client's chart and given to the psychiatrist to review.

E. Support:

1. Staff support for medical linkage and service coordination is critical to ensure clients obtain necessary medical services.

F. Transfer of Care:

1. Based on clinical stability and the client's recovery status, the client can be transitioned to his or her PCP for ongoing treatment of medical and psychiatric conditions. The mental health provider always maintains responsibility for medication support for mental health conditions that would not be responsive to PCP based treatment and provides consultation services to PCPs about specialty mental health issues and treatments (including medication consultation).
2. See Adult MH P&P 05-01 Regional Support Teams (RST) Service Levels and Criteria. *Admission & Discharge Table: only clients meeting Level I service needs who no longer require mental health specialty services may be transferred to a PCP.*
3. Transfer Information:
 - a. PCP Providers: Adult Mental Health Services has partnerships with designated health care providers. Each provider may have a specialized protocol. Provider information including protocols will be shared with Level I service providers.
 - b. Transfer Protocols: The protocols include obtaining a release of information for verbal communication and release of records. Documents requested may include the most recent versions of the R&R, AMSP, progress notes including medication regimes and mental health provider contact information. Some PCPs would like a phone consult in addition to records.
 - c. Warm Transitions: In order to help clients with the transition process, it is recommended that staff attend the first PCP appointment.
 - d. Consultation: Providing consultation will assist in the transfer process and during PCP service provision when requested. Adult MH Services is also committed to transitioning the client back to the MH service provider in the event of increased service needs.
 - e. Documentation: PCP contact information and transition information shall be recorded in the mental health discharge summary note.

Form References:

[Adult Health Questionnaire](#)

IV. REFERENCES	Related Policies & Procedures	State/Federal Codes/Other References
	Adult MH 05-01 RST Service Levels and Criteria Adult MH 04-02 Primary Care Consultation Service Quality Management 10-02 Health Questionnaire (Adult)	HIPAA DMH Performance Contract
V. CONTACTS	Name	E-mail
	Designated Contract Monitor	
VI. SCOPE	<input checked="" type="checkbox"/> Mental Health Staff <input type="checkbox"/> Mental Health Treatment Center <input type="checkbox"/> Specific grant/specialty resource	<input checked="" type="checkbox"/> Adult Contract Providers <input type="checkbox"/> Children's Contract Providers