


**County of San Bernardino  
Department of Behavioral Health**

**Medi-Cal Site Certification Policy**

**Effective Date** 02/01/07  
**Revision Date** 08/12/13

 CaSonya Thomas, Director

**Policy** It is the policy of the Department of Behavioral Health (DBH) to complete and review Medi-Cal site certifications, as defined for DBH contract/purchase order providers (provider) of DBH outpatient mental health services in accordance with state and federal statutes and regulations, excluding alcohol and drug services clinics.

**Purpose** To provide members of the DBH workforce an overview of the Medi-Cal site certification process and ensure all Medi-Cal sites affiliated with DBH adhere to state and federal regulations.

**Definition** **Change of address** is a change of location, including adding suites, expansion, relocating, or adding a new location.

**Re-Certification** is performed every three (3) years based on the Mental Health Plan's established initial and subsequent re-certification due dates.

**Transfer** is to convey or remove services from one DBH or provider clinic to another.

**Guidelines** The following guidelines shall be applied to Medi-Cal Site certifications affecting DBH provider clinic location(s) or service(s):

- Services to clients in need of continued care are not interrupted
- Clients receive timely notification of the action being taken
- Medical record privacy is protected and secured throughout the process
- Timely notifications are made to appropriate public, county and state departments and agencies
- Actions are standardized; see [Medical Certification flowcharts](#)
- Medi-Cal site certifications or changes to certifications shall have a detailed [Medi-Cal Certification Checklist](#) to follow. DBH Program Managers (PM) or designees shall be responsible for facilitating actions taken

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# County of San Bernardino Department of Behavioral Health

## Medi-Cal Site Certification Policy, Continued

**Processing  
Medi-Cal Site  
Certifications**

The following matrix illustrates the roles and responsibilities for processing Medi-Cal Site Certifications.

| Role                             | Responsibility   |
|----------------------------------|--|
| Program Manager (PM) or Designee | <ul style="list-style-type: none"> <li>• Coordinate the certification process</li> <li>• Request NPI from contract provider or DBH PM for DBH clinics</li> <li>• Review initial paperwork packet submitted</li> <li>• Confirm:               <ul style="list-style-type: none"> <li>○ Contracts are completed/updated</li> <li>○ Schedule A is completed as appropriate</li> <li>○ Cost Center exists, or requested as appropriate</li> </ul> </li> <li>• Notify DBH Public Information Officer (PIO) if necessary</li> <li>• Provide initial verification and approval of submitted documents for clinics and contracted agencies</li> </ul>  |
| Quality Management (QM)          | <ul style="list-style-type: none"> <li>• Oversee Medi-Cal site certification actions</li> <li>• Verify packet is completed</li> <li>• Ensure provider system information is updated</li> <li>• Send letter to contract provider or DBH Manager for DBH clinics granting certification after process has been completed</li> <li>• Conduct contract provider triennial reviews per the Department of Health Care Services (DHCS), Mental Health Services Division (MHSD) (See <a href="#">DBH Quality Management Onsite Reviews</a>)</li> <li>• Conduct site inspections for California Code of Regulations (CCR), Title 9 and DHCS requirements</li> <li>• Coordinate internal/external certification process with DHCS and DBH staff</li> <li>• Maintain all Medi-Cal Certification files for each clinic for audit purposes</li> </ul> |
| Fiscal                           | <ul style="list-style-type: none"> <li>• Review Schedule A of the contract for accuracy</li> <li>• Post new cost center report on DBH intranet</li> </ul>  |

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# County of San Bernardino Department of Behavioral Health

## Medi-Cal Site Certification Policy, Continued

**Processing  
Medi-Cal Site  
Certifications  
(continued)**

| Role                   | Responsibility  |
|------------------------|---|
| Information Technology | <ul style="list-style-type: none"> <li>• Assign new reporting unit numbers</li> <li>• Confirm provider as eligible</li> <li>• Confirm provider balances with Fiscal</li> <li>• Set up and activate office/clinic in the Behavioral Health Management Information System</li> <li>• Update system based on approved parameters (software, virtual private network, File Transfer Protocol)</li> <li>• Communicate completed system updates and provide support documentation to the following DBH units:               <ul style="list-style-type: none"> <li>○ Executive Team</li> <li>○ Fiscal</li> <li>○ Billing Office</li> <li>○ QM PMII</li> <li>○ QM Access Unit</li> <li>○ Contracts</li> <li>○ Research &amp; Evaluation</li> <li>○ Prevention and Early Intervention</li> <li>○ Public Information Officer (PIO)</li> <li>○ PM requesting the certification</li> </ul> </li> </ul> |

**DHCS MHSD  
Required  
Onsite Reviews**

The DHCS, MHSD will conduct the following reviews of county-owned and/or operated providers:

- New Provider Certifications
- Activation of one or more of the Modes of Service/Service Functions (MS/SF) below:
  - Medication Support (15/60)\*
  - Crisis Stabilization (10/20, 10/25)
  - Day Treatment (10/81, 10/85, 10/91, 10/95)
- Change of address
- Re-Certification of:
  - Crisis Stabilization (10/20, 10/25)
  - Day Treatment (10/81, 10/85, 10/91, 10/95)
  - Providers located within Juvenile Detention Facilities

**Exception:** "Prescription Only" Medication Support does not require DHCS onsite review. "Prescription Only" does not allow for the dispensing, administering and/or storing of medications including samples.

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# County of San Bernardino Department of Behavioral Health

## Medi-Cal Site Certification Policy, Continued

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### DBH Quality Management Onsite Reviews

DBH Quality Management (QM) will conduct the following reviews of existing certified county-owned and/or operated providers and complete the [Re-Certification/Certification Procedures for County-Owned and Operated Short-Doyle Medi-Cal Providers](#) for:

- Case Management/Brokerage (15/01)
  - Mental Health Services (15/30)
  - Therapeutic Behavioral Health Services (15/58)
  - Medication Support (15/60)
  - Crisis Intervention (15/70)
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### References

Code of Federal Regulations, Title 42, Section 438.10(f)(5)  
California Code of Regulations, Title 9, Section 785.28(c)(e)  
Alcohol and/or Other Drug Program Certification Standards, Section 7015(e)  
DBH Information Notice 09-06  
State of California Standard Agreement, Number 06-76046-000  
Department of Mental Health Information Notice 10-04

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### Related Policy and/or Procedure

DBH Standard Practice Manual:  
• QM6002-1: [Medi-Cal Site Certification Procedure](#)

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