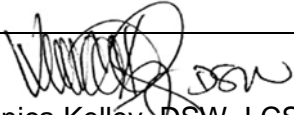


San Bernardino County Department of Behavioral Health

Telehealth Policy

Effective Date 07/18/2018
Approval Date 04/26/2019



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Policy It is the policy of the San Bernardino County (County) Department of Behavioral Health (DBH) to utilize telehealth to render behavioral health services in accordance with state and federal law, in order to increase access to care by offering telehealth as an alternative method for delivery of specialty mental health (SMH) and/or substance use disorder (SUD) services.

Purpose To outline the requirements of DBH staff in the delivery of behavioral health services via telehealth capabilities in accordance with the Telehealth Advancement Act of 2011, Welfare and Institutions Code 14132.172, and all other applicable state and federal laws.

Definition(s)

Asynchronous Store and Forward: Transmission of a client's medical information from an Originating Site to the health care provider at a Distant Site without the presence of the client.

Distant Site: Location where a health care provider is located while providing services via a telecommunications system.

Licensed Health Care Provider (LHCP): A licensed provider rendering telehealth services.

Marry Documents: Taking wet signature document(s) signed by the Licensed Health Care Provider and placing them on top of the wet signature document(s) signed by client and filing them in the chart when received from the Distant Site.

Medical Support Staff: Includes Mental Health Nurse I/II, Licensed Psychiatric Technician, Licensed Vocational Nurse, and/or Clinic Assistant.

Mock Chart: A photocopy of identified documents that the Distant Site Licensed Health Care Provider needs to provide quality care. This chart is as confidential and protected as the original medical record. Mock chart contents are as follows, if applicable:

- Medication record;
- Last two (2) to three (3) Progress Notes and other entries from clinical staff lab tests as received or requested, and
- All episode opening paperwork.

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Telehealth Policy, Continued

**Definition(s),
continued**

Originating Site: Location where a client is located at the time health care services are provided via a telecommunications system.

Synchronous interaction: Real-time interaction between a client and a health care provider located at a distant site.

Telehealth: Mode of delivering health care services via information and communication technologies to facilitate the diagnosis, consultation, treatment, education, care management, and self-management of a client's health care while the client is at an *originating site* and the health care provider is at a *distant site*.

Telehealth Liaison: An individual or group of individuals appointed by each clinic to assist with all aspects of the Telehealth process at their clinic.

Telemedicine: The use of medical information exchanged from one site to another using interactive telecommunications equipment that includes audio and video equipment permitting two-way, real-time, interactive communication between the client and Licensed Health Care Provider at the Distant Site to improve a client's health. (Centers for Medicare & Medicaid Services)

**Documentation
and Consent to
Treatment
Modality
Requirements**

The following include documentation requirements for telehealth services:

Type	Description
General	All standard chart documentation applicable to face-to-face encounters and telephone calls must be maintained for telehealth encounters.
Consent to Treatment	<p>Prior to delivery of telehealth services, the LHCP initiating the use of telehealth must inform the DBH client about the use of telehealth <i>and</i> obtain verbal or written consent, which must be documented.</p> <p>Note: All other treatment consent forms must also be obtained and documented.</p>

**Provider
Requirements
for Rendering
Telehealth
Provider**

The LCHP must be licensed within the State of California in order to provide care for clients in California via telehealth technologies. Additionally, the LCHP rendering telehealth services must not be doing so from a "distant site".

Reimbursement policies adopted by the California Department of Health Care Services (DHCS) to compensate a LCHP who provides health care services through telehealth that are otherwise reimbursable pursuant to the Medi-Cal program (Welfare and Institutions Code 14132.172 (c)).

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Telehealth Policy, Continued

Environment, Equipment, and Document Needs

Telehealth services must be conducted in a safe, confidential, and comfortable environment to ensure the client/family's needs are met.

Below is a table of the required elements to deliver telehealth services:

Element	Description
1	Two (2) audio and video conferencing machines of sufficient quality to support general network-based video communications.
2	Electronic signals transmitted in a secure fashion.
3	Evaluation and/or treatment performed in an environment where there is reasonable expectation of absence of intrusion by individuals not involved in the clients' direct care.
4	The physical presence or immediate availability at the originating site (e.g. situated outside the office) of a Registered Nurse, Licensed Vocational Nurse, or Psychiatric Technician during the session with clients who may need the security or reassurance that such presence provides. Note: Originating site clinic staff must have the capacity to call 911 for emergency services, if/when necessary.
5	Additional items needed at the distant site in the telehealth room include: <ul style="list-style-type: none">• Printer• Multiline phone• All necessary forms• Phone lists for Distant and Originating Sites• Call/reconnect instructions

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Telehealth Policy, Continued

Staffing Needs

- All clinics shall identify and appoint an individual or group of individuals to serve as the Telehealth Liaison(s). Both originating site and the distant site shall designate primary and secondary Office Assistant/Clinic Assistant staff for telehealth assistance.
 - Appropriate and qualified staff are required at both the originating site and the distant site to meet the needs of the client and staff providing the services.
 - Medical support staff must be available at the originating site to perform and transmit results of the routine vital signs, including heart rate, respiration, standing and sitting blood pressure, and temperature.
 - Medical support staff must be available at the originating site to confirm findings of the exam, including presence of tremor, ataxia, and other dyskinesias.
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Quality Improvement

All Quality Improvement activities related to behavioral health service treatment may be conducted in the same manner for telehealth encounters.

Results of Quality Improvement activities may be utilized to modify practices, policies and procedures regarding rendering telehealth services on an ongoing basis.

Video and Audio Transmission

Video and audio shall not be retained or transmitted in any medium, including the clinical record, prior to the establishment of a related policy and procedure for doing so in according to appropriate privacy laws and practices. Said retention must include the consent to record, signed by the client or caregiver or conservator. Specific mention of the retention period of this transmission will be required on any consent form approved for this purpose.

Electronic Transmission of Client Medical Record

When transmitting client medical records, staff must ensure the following:

- The copy/scan quality is sufficient to support photocopy transmission.
 - The transmission of the chart documentation records, including JV-220 forms, between the distant and originating sites must occur within one (1) business day.
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Related Policy or Procedure

DBH Standard Practice Manual:

- Confidentiality of Protected Health Information ([COM0905](#))
 - Telehealth Procedure ([MDS2027-1](#))
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Telehealth Policy, Continued

- Reference(s)**
- Business and Professions Code, Division 2, Section 2290.5
http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=BPC§ionNum=2290.5
 - CA Welfare and Institutions Code, Section 14132.72
http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=WIC§ionNum=14132.72
 - Code of Federal Regulations, Title 42, Section 410.78
https://www.ecfr.gov/cgi-bin/text-idx?SID=be765fde5bd7ce25510c046306539c76&mc=true&node=se42.2.410_178&rgn=div8
 - Telehealth Advancement Act of 2011
http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201120120AB415
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