Initial Health Assessment (IHA) / Staying Healthy Assessment (SHA) Requirements for Members with Medicare and Medi-Cal (Medi-Medi)

Requirement

Per California Department of Healthcare Services (DHCS) Title 22, CCR, Section 53851 (b) (1), complete Initial Health Assessment (IHA)/Staying Healthy Assessment (SHA) within 90 days of enrollment and annually thereafter.

Medical Group/Primary Care Physician Responsibilities

Conduct a comprehensive Initial Health Assessment and Staying Healthy Assessment within 90 days of enrollment and annually which must include:

- Present and past illness/injury/hospitalizations
- Height, weight, BP
- Social history, medications, immunizations
- Preventative services (age-appropriate assessments including but not limited to TB screening, clinical breast exam, allergies, chlamydia, mammogram, pap smear, etc.) – refer to USPSTF A/B guidelines for adults age 65 and older
- Physical review/assessment of all organ systems
- Assessment of Risk Factors (i.e. use of alcohol/drugs/tobacco, falls)
- Mental status exam
- Plan of care
- Must also include Staying Healthy Assessment- a specific form with questions to identify health risks and behaviors, for PCP to determine interventions
  - Must be part of medical record (or note that member declined)

How do you know which patients need an IHA/SHA?

SCAN provides monthly detailed patient-level data through the IHA ASAP Report located on the provider portal.

Report includes a list of all SCAN Medi-Medi members and whether they have had an IHA based on encounter data

Primary Care Physicians receive a letter and copy of the SHA questionnaire via fax for each new Medi-Medi SCAN patient
- Schedule IHA or annual comprehensive visit with patient
- Have patient complete SHA questionnaire and document in medical record
- Discuss any health risks identified and create risk reduction plan
- Put paper SHA in medical chart/record
  https://www.dhcs.ca.gov/formsandpubs/forms/Pages/StayingHealthy.aspx
- Patient can decline but that must be documented in medical record