

## **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?**

- Access IHA ASAP reports monthly from the SCAN Provider Portal
  - Go to SCAN Provider Portal
  - Click on SCAN Documents
  - Click on Network
  - Access the IHA\_ASAP folder
  - Report includes list of all SCAN Medi-Medi members and whether they have had an IHA based on encounter data
- Primary Care Physicians receive faxed letter and copy of the SHA for each new Medi-Medi SCAN patient
  - Schedule IHA or annual comprehensive visit with patient
  - Put paper SHA in medical chart
  - Complete with patient and document in medical records
  - Discuss any health risks identified and create risk reduction plan
  - Patient can decline but that must be documented in medical record



## Fact Sheet