



CalAIM Screening & Transition of Care Tools for Adults

Results from Pilot Testing

August 12, 2022

Overview

The Department of Health Care Services (DHCS) California Advancing and Innovating Medi-Cal ([CalAIM](#)) initiative “Screening and Transition of Care Tools for Medi-Cal Mental Health Services” aims to design a coherent plan to address beneficiaries’ service needs across Medi-Cal mental health delivery systems, ensure all Medi-Cal beneficiaries receive coordinated services, and improve health outcomes. The goal of the adult and youth Screening Tools is to determine the appropriate mental health delivery system referral for Medi-Cal beneficiaries newly seeking mental health services. The goal of adult and youth Transition of Care Tools is to ensure that Medi-Cal beneficiaries who are receiving mental health services from one delivery system receive timely and coordinated care when their services are being transitioned to or added from the other delivery system.

Both adult and youth Screening and Transition of Care Tools were designed in consultation with stakeholders and have undergone beta testing. Following beta testing, the adult Screening and Transition of Care Tools were updated and pilot tested.¹ This document summarizes feedback collected as part of the Adult Screening and Transition of Care Tools Pilot, which was conducted from March 1, 2022 to May 31, 2022. Pilot testing was conducted by four county Mental Health Plan (MHP) and Medi-Cal Managed Care Plan (MCP) pairs representing large counties, small counties, counties with urban regions, and counties with rural regions, and was designed to gather robust feedback to assist in further refinement of the tools before the January 1, 2023 implementation date. During the pilot, MHP/MCP staff completed a survey after each tool administration. The survey was designed to help identify critical issues in use of the tools and areas for improvement. The survey also included several beneficiary-facing

¹ Following beta testing, the youth tools were also updated. They will be pilot tested from June 20, 2022 to September 16, 2022.

questions to gather information about their experience with the tools. The results presented below represent DHCS' findings based on the survey data.

Results Summary

A total of 897 surveys were completed for the Adult Screening Tool and 26 surveys were completed for the Adult Transition of Care Tool. Data from survey responses revealed several notable findings, which are outlined below.

Beneficiary Satisfaction

- Median beneficiary satisfaction with the Adult Screening Tool was of 10 out of 10.
- Median beneficiary satisfaction with the Adult Transition of Care Tool was of 8 out of 10.

Administration Time & Completion

- Median administration time for the Adult Screening Tool was 30 minutes.
- Median administration time for the Adult Transition of Care Tool was 30 minutes.
- The majority of Adult Screening and Transition of Care Tools were completed over the phone.
- 97% of the Screening Tools and 100% of the Transition of Care Tools were completed.

Staff Training Levels

- The primary training levels of staff administering the Screening Tool were Bachelor's degree (54%) and Master's degree licensed (29%).
- The primary training level of staff administering the Transition of Care Tool was Master's degree licensed (85%).
- Overall, the majority of tool administrators felt the tools were appropriate to their training level. However, the majority of Administrative (57%) and Peer (74%) level staff felt that Screening Tool questions were not appropriate to their levels of training.

Scoring & Beneficiary Placement

- Screening Tool:
 - 74% of beneficiaries screened were referred to non-specialty level of care (MCP).
 - 26% of beneficiaries screened were referred to specialty level of care (MHP).
 - 93% of those administering the screening tool believed that the beneficiary was referred to the right level of care. However, narrative feedback indicated that the scoring rubric was confusing and did not adequately match the information provided by the screening questions.

- Transition of Care Tool:
 - The majority of beneficiaries (75%) for whom a transition of care tool was completed indicated need for specialty level of care (MHP).
 - ~40% of those completing the transition of care tool felt the rubric was not necessary to determine the appropriate level of care for the beneficiary.

Modifications to Tools

In response to the pilot testing results, the following updates have been made to the draft Adult Screening and Transition of Care Tools:

Screening Tool

- Updated scoring methodology to better align with screening tool questions.
- Updates to select screening tool questions to ensure clarity and alignment with scoring methodology.
- Associated updates to tool instructions.

Transition of Care Tool

- Removal of scoring rubric to better align with the intent of the tool.
- Updates to language to ensure clarity.
- Associated updates to tool instructions.

If you have questions about the Screening and Transition of Care Tools initiative, please e-mail DHCS at BHCalAIM@dhcs.ca.gov.