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<b>SECTION: Office Management</b>	
<b>POLICY AND PROCEDURE: Staying Healthy Staying Healthy Assessment (SHA Tool)</b>	Approved date: _____ Approved by: _____ Effective date: _____ Revised date: _____ Revised date: _____

**POLICY:**

The “Staying Healthy Assessment (SHA) form (also known as Staying Healthy Assessment) will be completed for all Cal MediConnect members within 120 days of enrollment as part of their Initial Health Assessment. The assessment will provide dialogue between the provider and patient to:

- Identify and track patient high-risk behaviors
- Prioritize patient health education needs related to lifestyle, behavior, environment, and cultural and linguistic needs
- Initiate discussion and counseling regarding high-risk behaviors
- Provide tailored health education counseling, interventions, referral, and follow-up

This is a State Department of Health Care Services requirement under the Medi-Cal Managed Care contract.

**PROCEDURE:**

Office Staff will obtain SHA forms in the appropriate age and language. Forms are available from the Health Plans or can be downloaded at [www.dhcs.ca.gov/formsandpubs/forms/Pages/StayingHealthy.aspx](http://www.dhcs.ca.gov/formsandpubs/forms/Pages/StayingHealthy.aspx).

Office staff will give the age and language-appropriate form to the patient or legal guardian to complete while waiting for their visit and offer assistance in completion of the form if needed. Staff will inform the patient/legal guardian that completing this form is voluntary and will help their doctor understand their health education needs.

**If a patient refuses to complete the assessment, staff will document the patient’s refusal in the patient’s medical record. (staff may document this directly on the back page of the assessment form.**

- A. Administer all SHA questionnaires within 120 days of enrollment**
- B. Re-administer the SHA as members enter the new age group.**
- C. Review the SHA annually to update any changes, sign, date, note interventions and counseling.**

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**D. The following lists the SHA for adults by age groups(as appropriate for each provider's practice type):**

- Members ages 18-55; Generally, the "Adult" questionnaire should be completed by all.
- After age 55, the PCP needs to select the assessment (Adult or Senior) best suited for the patient based on health status, biological age, chronic conditions, mobility, etc.

1. Alcohol use question:

- a. The alcohol screening question is based on U.S. Preventive Task Force (USPSTF) recommendations #19 on the Adult SHA and #23 on the Senior SHA.
- b. **Alcohol Misuse Screening and Counseling (formerly SBIRT-Screening, Brief Intervention and Referral for Treatment ) benefit:**
- c. If "yes" to alcohol question, offer an expanded screening questionnaire (such as the AUDIT or AUDIT-C) and if indicated, one to three 15-minute brief interventions.
- d. These screening questionnaires identify patients with potential alcohol use disorders who need referral for further evaluation and treatment.
- e. **Screening, Brief Intervention and Referral for Treatment (SBIRT):**
- f. Providers offering AMSC are recommended to take special training. A list of training resources is available – contact your health plan for more information
- g. The alcohol SBIRT benefit went into effect January 1, 2014.

**DOCUMENTATION:**

The physician must sign, print name and date the newly administered SHA to verify it was reviewed with the member and assistance/follow up was provided as needed.

- A. The form will be filed in the patient's medical record.
- B. The physician will review the SHA form at subsequent visits, or at least annually for additional counseling and follow-up.
- C. Subsequent SHA administration is required every three to five years for adults and seniors.

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All SHA questionnaires and forms are available on the DHCS website in English and all threshold languages at:

<http://www.dhcs.ca.gov/formsandpubs/forms/Pages/StayingHealthy.aspx>

Arabic*	Khmer*
Armenian	Korean
Chinese	Russian
English	Spanish
Farsi*	Tagalog
Hmong	Vietnamese