

Initial Health Assessment Reference Guide

What is the Initial Health Assessment?

The Initial Health Assessment (IHA) is a comprehensive assessment completed during the member's initial visit with their selected or assigned primary care provider (PCP). The Department of Health Care Services (DHCS) requires that all newly enrolled CalOptima members be offered and provided access to an IHA within the first 120 days of their effective date with CalOptima. For members under the age of 18 months, the IHA should be offered within 120 days following the date of enrollment or within the most recent periodicity timelines established by the American Academy of Pediatrics for ages two and younger, whichever is less. See a DHCS training at <https://www.dhcs.ca.gov/formsandpubs/forms/Pages/StayingHealthy.aspx>, also found on the CalOptima website under the Providers tab in the [Health Education section](#).

Components of a Complete IHA:

- The IHA is completed within the first 120 days of member's effective date with CalOptima and includes the following:
 - **Comprehensive history**, which includes history of present illness, past medical history, social history and review of organ systems
 - **Preventive services**
 - **Comprehensive physical and mental status exam**
 - **Diagnoses and plan of care**
 - **Individual Health Education Behavioral Assessment (IHEBA)**, also known as the **Staying Healthy Assessment (SHA)**, for each appropriate age group

Identifying Members in Need of an IHA

Every month, CalOptima adds to the FTP site a list of newly enrolled members for each health network to distribute to the assigned PCP.

Codes for Documenting the IHA

The IHA completion is documented using the codes in tables 1 and 2 below:

- 1) **IHA visit**, includes comprehensive history, preventive services, comprehensive physical and mental status exam, and diagnoses and plan of care (see Table 1)
- 2) **IHEBA/SHA** (see Table 2)

Tips for Meeting the IHA Requirement:

- For full credit, make sure to complete the IHA within 120 days of member's effective date with CalOptima, and submit codes for both the IHA visit and IHEBA/SHA.
- If a member comes in for a sick visit, find the opportunity to complete all the components of the IHA and include the appropriate Current Procedural Terminology (CPT) code from Table 1 on the claim or encounter form. This counts for the IHA if the visit is within a 120-day time period.

What Provider Offices Need to Know:

- Use standardized chart forms.
- Take time to document ALL components of the IHA.
- Send in complete and accurate claims and encounter data.
- Contact members shown on your monthly new member lists whom you have not yet seen during the identified period.
- Document outreach attempts to schedule IHA in member chart.
- If a member misses an IHA appointment, document attempts to reschedule.
- For members with unsuccessful IHA completions, document two attempts at a minimum.

Table 1: IHA Visit Codes

Description	CPT or Diagnosis Code(s)
OFFICE/OUTPATIENT VISIT NEW	99202, 99203, 99204, 99205
OFFICE/OUTPATIENT VISIT EST	99211, 99212, 99213, 99214, 99215
OFFICE CONSULTATION	99241, 99242, 99243, 99244, 99245
NURSING FACILITY INIT	99304, 99305, 99306
DOMICILE/R-HOME VISIT NEW PAT	99324, 99325, 99326, 99327, 99328
HOME VISIT NEW PATIENT	99341, 99342, 99343, 99344, 99345
HOME VISIT EST PATIENT	99347, 99348, 99349, 99350
INIT PM E/M NEW PAT INFANT	99381
INIT PM E/M NEW PAT 1-4 YRS	99382
PREV VISIT NEW AGES 5-11	99383
PREV VISIT NEW AGES 12-17	99384
PREV VISIT NEW AGE 18-39	99385
PER PM REEVAL EST PAT INFANT	99391
PREV VISIT EST AGE 1-4	99392
PREV VISIT EST AGE 5-11	99393
PREV VISIT EST AGE 12-17	99394
PREV VIST EST AGE 18-38	99395
BEHAV CHNG SMOKING 3-10 MIN	99406
BEHAV CHNG SMOKING > 10 MIN	99407
INIT NB EM PER DAY NON-FAC	99461
ALCOHOL AND/OR DRUG SCREENING/Annual	G0442
COMPREHENSIVE MULTIDISCIPLINARY EVALUATION	H2000
CPSP INITIAL COMPREHENSIVE ASSESSMENT	Z6500
CPSP INITIAL NUTRITIONAL ASSESSMENT	Z6200
CPSP INITIAL PSYCHOSOCIAL ASSESSMENT	Z6300
CPSP INITIAL HEALTH ED ASSESSMENT	Z6402
CPSP ADDITIONAL INITIAL NUTRITIONAL ASSESSMENT	Z6202
CPSP ADDITIONAL INITIAL PSYCHOSOCIAL ASSESSMENT	Z6302
CPSP ADDITIONAL HEALTH ED ASSESSMENT	Z6404
INITIAL ANTEPARTUM OFFICE VISIT	Z1032

Table 2: IHEBA/SHA Codes*

Description	CPT Code
HLTH BHV ASSMT/REASSESSMENT	96156

*CPT sequence 96156-96171 falls under Health and Behavior Assessment/Intervention Procedure