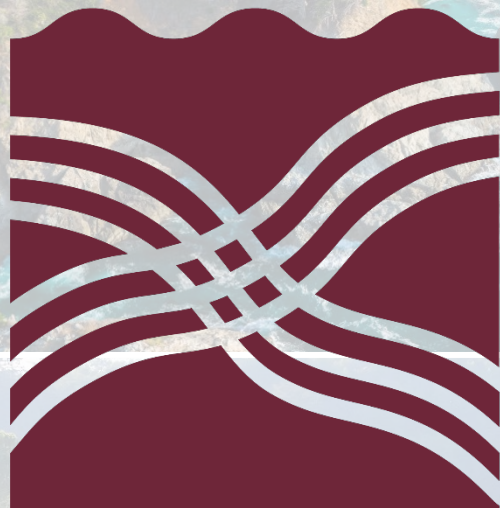


PARTNERSHIP



HEALTHPLAN  
of CALIFORNIA  
*A Public Agency*



# Initial Health Appointment



# Initial Health Appointment (IHA) Timeline

- The Initial Health Assessment (IHA) retired effective January 1, 2023
- Replaced with Initial Health Appointment (IHA) effective January 1, 2023
  - Major difference between the two IHAs. NO Staying Healthy Assessment (SHA) required.\*
  - \*Keep in mind, all screening obtained from a completed SHA will need to be gathered using approved screening tools (ex: Alcohol misuse, Tobacco, Drugs, etc.)\*
- Effective January 1, 2024, SHA criteria was replaced with Member Risk Assessment.



# What is an IHA?

- An Initial Health Appointment (IHA) is a tool for providers to perform a comprehensive health assessment of their patients.
- The IHA allows providers to quickly identify acute and chronic conditions.
- Must be preformed by a provider within the primary care setting (General Practice, Pediatrics, Obstetrics, Gynecology and Internal Medicine).
- Must be provided in a way that is culturally and linguistically appropriate for the member.
- Must be documented in the medical record.

# When to Complete an IHA

- The IHA is intended to be conducted during the member's initial visit with their Primary Care Physician (PCP). Within the first 120 days of enrollment to Partnership or newly assigned to a PCP clinic.  
\*\*\*\*Remember: Members may NOT be assigned until 30 days into their enrollment, so more along the lines of a 90 day time frame to get members in for initial visit
- Is not necessary if the (PCP) determines that the member's medical record contains a complete IHA within the previous 12 months.
- IHA must consist of two components:
  - 1) Comprehensive History and Physical
  - 2) Member Risk Assessment

# IHA: Comprehensive History and Physical

- Includes all of the following:
  - History of present illness
  - Past medical history
  - Social history
  - Review of Organ Systems (ROS) including dental assessment
- An IHA must also include:
  - An identification of risks
  - An assessment of need for preventative screens or services
  - Health education
  - The diagnosis and plan for treatment of any disease

# IHA: Member Risk Assessment

Initial Member Risk Assessments related to health and social needs of members, including cultural, linguistic, and health education needs; health disparities and inequities; lack of coverage/access to care; and social drivers of health (SDOH) shall be conducted.

An assessment of at least one of the following risk assessment domains within 120 days of the effective date of enrollment into the Plan or PCP effective date (whichever is more recent), or within the 12 months prior to plan enrollment/PCP effective date meets the standard:

- **Social Determinants of Health**
- **Adverse Childhood Experiences**
- **Cognitive Health Assessment (65+ years and up)**

# Tips and Tricks for Success

- Send out timely reminders and document your outreaches
- Document refusals
- Chart scrub and take advantage of acute visits
- Completing the IHA is a team activity

# Two Attempt Tracker

- Document your IHA outreach attempts and provide this information during the health plan and/or State visits to your site.
  - Two attempts
- A minimum of two attempts of different methods (ex: one written, one verbal)
- Attempts must be documented and available upon request. Make sure to develop an internal process to record your attempts (ex: spreadsheet, making patient chart in EHR).





# Partnership Care Coordination

Health care guides and nurse case managers are available to assist with:

- Access to care
- Emotional support
- Advanced care planning
- Health education
- Caregiver education
- Short- or long-term care plans
- Community resources
- Transportation
- Coordination of services
- Weekly/Monthly contact
- DME or ancillary assistance
- Many other services

Call (800) 809 -1350 or email  
[CCHelpDeskREDDING@partnershiphp.org](mailto:CCHelpDeskREDDING@partnershiphp.org)



# Contact Information

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