

Targeted Investments Year 2 Document Validation Criteria

Note: The intent is that NO protected health information [PHI] is uploaded through the TI attestation portal

Core Component	Milestone	Validation Method	Review Criteria
1	Utilize a BH integration toolkit and action plan and determine level of integration	IPAT score submitted through Survey Monkey to AHCCCS	N/A
2	Demonstrate that the practice has begun using an integrated care plan	Upload sample integrated care plan form through the TI attestation portal	Integrated care plan must include the following elements: <ul style="list-style-type: none"> <input type="checkbox"/> Patient goals for improved health <input type="checkbox"/> Problem identification <input type="checkbox"/> Risk drivers <input type="checkbox"/> Barriers to care <input type="checkbox"/> Action items for the clinical team, patient and / or family.
3	Document policies and procedures for intervention or referral to specific resources/agencies	Upload the SDOH intervention policy through the TI attestation portal	The SDOH intervention policy must include: <ul style="list-style-type: none"> <input type="checkbox"/> Which member of the clinical team will make the connection between the member and a specific resource or agency. <input type="checkbox"/> The selected SDOH screening tool <input type="checkbox"/> How the member of the clinical team will make the connection (e.g., telephone call, email, resource / agency intake form, etc.).
4	Document protocols that cover how to: <ol style="list-style-type: none"> 1) Refer members, 2) Conduct warm hand-offs, 3) Handle crises, 4) Share information, 5) Obtain consent, 6) Engage in provider-to-provider consultation. 	Upload communication protocols with physical and behavioral health providers & MCOs through the TI attestation portal	Communication protocols with physical and behavioral health providers and MCOs must include specific processes for: <ul style="list-style-type: none"> <input type="checkbox"/> Referring members <input type="checkbox"/> Conducting warm hand-offs <input type="checkbox"/> Handling crises, including <input type="checkbox"/> Obtaining member consent <input type="checkbox"/> Sharing information at the time of referral and periodically afterward while the member is still a patient of both providers

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5	Develop and utilize a written protocol for use of Health Current Admission Discharge-Transfer (ADT) alerts in the practice's management of high-risk members	Upload written protocol for use of Health Current ADT alerts in the practice's management of high-risk members.	<p>The protocol for use of Health Current ADT alerts must include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Which position title(s) of the clinical team are responsible for reviewing ADT alerts. <input type="checkbox"/> How ADT alerts will inform the practice's high-risk individuals.
6	Identify the sources for the practice's list of community-based resources and identify the agencies and community-based organizations to which the practice has actively outreached and show evidence of establishing procedure for referring members that is agreed upon by both the practice and the community-based resource.	Upload procedure for referring members that is agreed upon by both the practice and the community-based resource through the TI attestation portal	<p>The procedure for referring members to community-based resources must:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Show that it was defined collaboratively with one or more community-based resources. <input type="checkbox"/> Include the method by which the practice will refer the patient, including which member of the clinical team is responsible for making the referral.