

Workflow Process for Delivering HBAI Services When CDSME Is the Selected Group Intervention

Health Behavior and Assessment Intervention (HBAI) is a clinical service led by a clinical psychologist that is covered by the Medicare Part B program, Medicare Advantage plans, some Medicaid plans, and most commercial insurers. HBAI services are rendered to an individual or in group settings, using a structured group intervention under the direct supervision of a licensed clinical psychologist.

Some Medicare Advantage plans and commercial insurers allow HBAI services to be rendered by a licensed social worker. This requirement is subject to the social work scope of practice requirements in the state where services are being rendered.

In addition, Medicare and some other payers allow HBAI services to be performed by a qualified physician or non-physician provider (i.e., nurse practitioner, or physician assistant). When HBAI services are delivered under this model of supervision, the evaluation and management (E&M) codes are used for billing.

A chronic disease self-management education program (CDSME) can be included as a component of the HBAI group intervention when the qualified clinician deems that is medically necessary and the Medicare beneficiary agrees to participate.

Weekly Workflow Process Example

Below is an example of a workflow process with the appropriate HBAI coding to use when a psychologist or licensed social worker performs the supervision for a CDSME class offered as a component of the HBAI group intervention. Note - This is one example of a workflow process developed for training purposes. In a practice setting, each organization must determine its specific business model, while assuring that the needs of the population it serves are met. Additionally, the clinician must exercise professional judgment about the services that are provided and the codes that are billed, and each CDSME class participant must provide advance consent for the services.

Week 1: Individual Assessment with the Appropriate Licensed Clinician:

Each new participant will undergo a 1:1 in person assessment with the licensed clinician to determine perceived psychosocial barriers to managing the chronic disease. The assessment will include information about the individual's relevant medical history; age; cultural influences; cognitive and emotional factors; health beliefs, attitudes, and behaviors; disease self-

management knowledge, skills and practices; readiness to learn, health literacy level, physical/functional limitations; social and environmental factors; and financial status.

An assessment tool can be used to capture information that is part of the intake process. The completed assessment tool should be reviewed by the appropriate licensed clinician. The assessment tool is subject to modification as part of the ongoing quality improvement efforts.

During this assessment, educational goal(s) and learning objectives, and the plan for educational content and method/s will be developed collaboratively between the participant and clinician. This plan will include, where appropriate, ongoing assessment with the appropriate licensed clinician and/or referral to a chronic disease self-management education (CDSME) program.

A key feature of CDSME programs is to support the participants with developing goal setting capability. The development of appropriate health maintenance goals and tracking the attainment of these goals is an essential skill to improving disease self-management skills. Weekly progress of the participant's improvement in attaining well-defined goals must be documented in the education record. The appropriate documentation should include elements such as the weekly action plan goal, attainment of the defined goal, barriers to goal attainment, and refinement of action plan goals for the subsequent week.

During the initial assessment, any additional needs that are identified by the participant, in collaboration with the licensed clinician, will be addressed outside of the CDSME class individually, but will be an integral part of the entire chronic disease self-management education process. This plan will also include a personalized follow-up plan for ongoing self-management support, which will be developed collaboratively by the participant and clinician.

The participant's outcomes and goals and the plan for ongoing self-management support will be communicated and documented. These outcomes and goals may be distinct and in addition to the goal or "action plan" participants develop in the CDSME program as discussed below. The follow-up plan for ongoing self-management support will focus on long-term self-management that occurs after the CDSME class ends.

In an effort to provide an ongoing evaluation of the participant's attainment of educational goals, the licensed clinician will continue discussions with each individual during the eight-week intervention (six CDSME sessions, plus an initial assessment prior to the start of the CDSME class and a follow-up session at the conclusion of the CDSME class) as determined by the clinician in an effort to measure attainment of participant-defined goals and outcomes at regular intervals using appropriate measurement techniques to evaluate the effectiveness of the educational intervention. The assessment and any follow-up documentation will be provided by the licensed clinician to the primary care provider or referring provider, and the licensed clinician will be available to discuss the assessment and plan with the provider.

The licensed clinician and group leaders will further engage in regular communication with one another during the six-week CDSME intervention to ensure that the participant's plan is appropriate and to address any challenges, questions, lack of information, or other support the participant may need from either the licensed clinician, primary care provider, or other members of the participant's care team. The licensed clinician will document regularly all communication with group leaders.

Week 1 Encounter Coding:

HBAI - 96150 (Initial Assessment)

Weeks 2, 3, 4, 5, 6 and 7- (CDSME Sessions 1 - 6): The clinician is responsible for providing direct supervision and oversight to all group encounters. In addition, the licensed clinician will monitor the goal setting and goal attainment of each participant based on their documented action plan participation. The licensed clinician may meet with participants individually, outside of the group CDSME, if indicated. Each individual and/or group encounter should be documented in the participant record. The documentation should include the barrier being addressed, goal setting, evaluation of goal attainment, and planned interventions to address perceived barriers.

Group Interventions Weeks 2 - 7: The CDSME class is the base curriculum for the HBAI service. This group intervention is targeted to participants that require assistance to improve disease self-management capability and to improve goal setting and goal attainment evaluation skills. During this six-week workshop, participants will be provided with an array of tools to improve their ability to self-manage their conditions. The CDSME class is the primary intervention, to fulfill the participant's need for improved disease self-management skills, but will not be the only intervention and will be coupled with the individualized education plan developed collaboratively based on the initial assessment. The CDSME class is provided by group leaders, under the direct supervision of the licensed clinician and includes discussion of all relevant disease self-management education benchmarks, including but not limited to the following:

- Understanding self-management and chronic diseases
- Mind body connection / Distraction
- Getting a good night's sleep
- Making an action plan
- Feedback / Problem solving
- Dealing with difficult emotions
- Physical activity and exercise
- Preventing falls and improving balance
- Making decisions
- Pain and fatigue management
- Endurance and exercise
- Relaxation / body scan
- Better breathing
- Healthy eating
- Communication skills

- Making healthy food choices
- Medication usage
- Making informed treatment decisions
- Dealing with depression
- Positive thinking
- Working with your healthcare professional
- Weight management
- Looking back and planning for the future

The program also requires participants to continue to set individualized weekly goals or "action plans" and to provide follow-up for each action plan achieved. For action plans not achieved, participant engages in problem solving activities with the group to brainstorm potential solutions. The weekly goals or "action plans", for each participant, should be documented in the education record along with information about the attainment or lack of attainment of the established goals. The licensed clinician should review the weekly progress of each participant and meet individually with participants, outside of the CDSME class, if indicated.

During weeks 2 - 7, the licensed clinician remains available to both the group Leaders and the participant to measure attainment of patient-defined goals and patient outcomes at regular intervals using appropriate measurement techniques to evaluate the effectiveness of the educational intervention. The primary goal is an improvement in the participant's self-management behaviors.

During this time period, the success of the CDSME intervention in meeting the participant's defined goals is measured by the participant's ability to set weekly measurable goals and report back on attainment of these weekly goals in a group setting, with peer involvement. Documentation of the attainment of this goal will be class attendance and participation in the weekly goal setting process with the peer group.

Other goals outside of improved self-management behaviors will be addressed as part of the individualized plan and will occur outside of the CDSME group intervention but remain part of the entire HBAI intervention and will be directed by the licensed clinician, in collaboration with the participant. Documentation of class participation, weekly goal setting, and individualized assessment will be maintained in the participant's chart.

Weeks 2 - 7 Encounter Coding:

HBAI (Individual) - 96152 (If individual sessions are provided during the six-week CDSME class)

HBAI (Group) - 96153 (For each CDSME group session)

Week 8: At the end of the CDSME intervention, the participant will develop a follow-up plan in a collaborative manner with the licensed clinician. There will be a multi-disciplinary approach to completing this process. The multi-disciplinary team works with the participant to develop realistic, individualized goals and an ongoing evaluation plan. Generally, the follow-up plan is completed as an individual encounter.

The multi-disciplinary team consists of, at a minimum, the following:

- the licensed clinician,
- the group leaders delivering the disease self-management classes, and
- the participant's primary care provider.

Week 8 Encounter Coding:

HBAI - 96152

Table 1: Potential Billing Using HBAI Codes Based on Above Workflow Example

Service	CPT code	Units	Rate per Unit	Total
Week 1 - Initial Assessment (1 hr)	96150	4	\$ 22.68	\$ 90.72
Week 2 - CDSME Group Session (2.5 hrs)	96153	10	\$ 4.68	\$ 46.80
Week 3 - CDSME Group Session (2.5 hrs)	96153	10	\$ 4.68	\$ 46.80
Week 4 - CDSME Group Session (2.5 hrs)	96153	10	\$ 4.68	\$ 46.80
Week 5 - CDSME Group Session (2.5 hrs)	96153	10	\$ 4.68	\$ 46.80
Week 6 - CDSME Group Session (2.5 hrs)	96153	10	\$ 4.68	\$ 46.80
Week 7 - CDSME Group Session (2.5 hrs)	96153	10	\$ 4.68	\$ 46.80
Week 8 - CDSME (1 hr Post Intervention Assessment)	96152	4	\$ 20.88	\$ 83.52
CDSME Reimbursement Subtotal Per Person				\$ 455.04
CDSME Reimbursement Subtotal for 12 Participants				\$5,460.48

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