

## **INITIAL HEALTH ASSESSMENT GUIDELINES AND CHECKLIST**

**All new Medi-Cal program members\* must receive a timely and comprehensive IHA within 120 days of enrollment.**

- Appointment must be available to member within 30 calendar days upon request.
- Primary care providers must make at least three documented attempts to schedule a timely IHA – including one phone call and one letter.

<b>Scenario</b>	<b>IHA required? Y/N</b>	<b>Exception Y/N</b>
Member new to plan and new to primary care provider	Y	N
Member new to plan but established with a primary care provider	N	Y
Member enrolled with plan in previous 12 months and completed an IHA	N	Y
Member not continuously enrolled with the plan or disenrolled within 120 days of enrollment	N	Y

**Directions: Please check off any information below that may be relevant to be the patient based on their characteristics and the requirements of IHA.**

Member Name:

Gender:

Age:

### **What should the IHA include?**

#### **1. For New Members**

- a. Members should schedule an Initial Health Assessment (IHA) within the first 120 days of becoming a health plan member.
- b. Many health plans cover preventive care services; periodic health exams include all routine diagnostic testing and laboratory services. These include, but are not limited to:

- i. Periodic health maintenance exams, including well-woman exams.
- ii. Immunizations, consistent with the most current version of the Recommended Childhood Immunization Schedule/United States adopted by the Advisory Committee on Immunization Practices (ACIP).
- iii. Sexually Transmitted Disease (STD) tests.
- iv. Cytology exams on a reasonable periodic basis
- v. Immunizations required for travel
- vi. Other age appropriate immunizations
- vii. Acquired Immune Deficiency Syndrome (AIDS) vaccine
- ii. Osteoporosis Services
- iii. Eye examinations:
  - 1. Routine exam
  - 2. Eye refractions to determine the need for corrective lenses
  - 3. Dilated retinal eye exams
- iv. Health education
- v. All generally medically accepted cancer screening tests including, but not limited to:
  - 1. Breast Cancer Screening
  - 2. Prostate Cancer Screening
  - 3. General Cancer Screening
  - 4. Mammography Services
  - 5. Cervical Cancer Screening
  - 6. Diethylstilbestrol Services
- vi. Well baby care during the first two years of life, including:
  - 1. Newborn hospital visits newborn screenings
  - 2. Newborn health examinations, and other office visits, consistent with the most current recommendations for Preventative Pediatric Health Care as adopted by the American Academy of Pediatrics; and consistent with the most current version of the recommended childhood Immunization

Schedule/United States, adopted by the Advisory Committee on  
Immunization Practices (ACIP).

**2. Health Assessments for members 21 years and older must include, at minimum:**

- a. Completion of a Staying Healthy Assessment form/SHA before or during initial visit for Medi-Cal
- b. Complete history and physical examination that includes inspection of ears, nose, mouth, throat, teeth and gums;
- c. Blood Pressure;
- d. Cholesterol;
- e. Clinical breast exam for women over 40 years of age;
- f. Mammogram within 2 years for women over 40 years of age and within 1 year for women 50 and above;
- g. Pap smear for women beginning at the age of first sexual intercourse and once every 1-3 years depending on the presence or absence of risk factors and the results of previous pap smears;
- h. PPD;
- i. Health education and anticipatory guidance appropriate to age and health statistics;
- j. Fecal Occult Blood testing every year after age 50;
- k. Sigmoidoscopy at least once at age 50;
- l. Rectal exam at least once every 5 years after age 50;
- m. Prostate Specific Antigen (PSA) testing for men annually after age 50;
- n. Exam of testes for men;
- o. Rubella Antibody screening for women of childbearing age at least once prior to first pregnancy;
- p. Immunization for Diphtheria/Tetanus (Td) at least every 10 years;
- q. Influenza vaccine every year after age 65.
- s. TB Test for members considered to be high risk

3. Health assessments for members under 21 years of age must include, at minimum

(Pediatric patients should receive CHDP Health Assessments per the CHDP periodicity schedule.):

- a. Completion of a Staying Healthy Assessment form/ SHA before or during initial visit for Medi-Cal
- b. Health and developmental history;
- c. Unclothed physical examination, including assessment of physical growth;
- d. Inspection of ears nose, mouth throat, teeth and gums;
- e. Assessment of nutritional and dental status;
- f. Hearing and Vision screening, as appropriate;
- g. Immunizations and Tuberculosis testing appropriate to age and health history necessary to make status current;
- h. Lab tests appropriate to age sex, including anemia, diabetes, lead levels, sickle cell trait and urinary tract infections;
- i. Health education and anticipatory guidance appropriate to age and health status.
- j. Lead Screening