**Procedural Standard 20-1**

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TO: DES Staff

**FR:** Frank Joyce, RN, Executive Director, Disability Evaluation Services (DES)

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Disability Evaluation Services

RE: **DES Contractor Consultative Examination (CE) Requirements for** **Behavioral Health Services Through Use of Telehealth (Massachusetts)**

Purpose: Recognizing that the use of *telehealth* techniques can increase access to behavioral health evaluation services and expedite the disability determination process, DES engages qualified behavioral health professionals to provide consultative examination services in that manner.

The DES Manager of Business & Service Delivery Development (or designee) is responsible for recruitment, credentialing, training and contracting with DES CE providers. Massachusetts CE providers using telehealth must be fully credentialed in the same manner as other providers of in-office examinations. In addition, this standard describes the specific training requirements and examination procedures for contractors providing behavioral health services through use of *telehealth*.

**Training Requirements:** To ensure the competency of the Disability Evaluation Services (DES) Contractors involved in the delivery of behavioral health services via telehealth, only behavioral health professionals who have been trained in the provision of services via telehealth, including training in the use of the telehealth equipment and secure HIPAA applications may provide services via telehealth.

Training must include:

* Familiarity with telehealth equipment, its operation, and limitations;
* Familiarity with procedures to follow for equipment problems and/or failures;
* Safeguarding the confidentiality and security of telehealth records and compliance with all applicable state and federal laws, including, but not limited to, HIPAA regulations, at both the originating and distant sites; and
* Adherence to best practices for CEs using telehealth technologies, including protocols and guidelines as contained in the Contractor’s agreement with DES, and its attachments, including but not limited to the Scope of Work, the Business Agreement, the Insurance Schedule and the Data Management Agreement.

The DES Manager of Business & Service Delivery Development (or designee) will assure that a potential behavioral health services contractor has satisfactorily completed the listed training requirements before finalizing a contract with UMass to provide telehealth services.

**Procedure for Conducting the Telehealth Examination:** The DES Contractor must adhere to and document the following best practices when delivering consultative examination services via telehealth:

1. The Contractor must properly identify the DES Applicant using, at a minimum, the Applicant’s name, date of birth, and MassHealth ID.
2. The Contractor and anyone present to assist the Contractor or to assist the Applicant, including but not limited to interpreters must disclose and explain the purpose of the consultation by providing his/her identity and credentials, such as his/her professional license number, title, and, if applicable, specialty.
3. The Contractor, prior to each appointment, must ensure that he/she is able to deliver the CE service to the same standard of care and in compliance with licensure regulations and requirements, programmatic regulations, and performance specifications related to the service (e.g., accessibility and communication access) using telehealth as is applicable to the delivery of the services in person. If the Contractor cannot meet this standard of care due to unforeseen technical reasons or the Applicant’s failure to follow issued instructions, or any other requirements, and an alternative method to conduct the CE cannot be accessed, the Contractor must terminate the CE and contact DES.
4. The Contractor must ensure the same rights to confidentiality and security as provided in face-to-face services.
5. The Contractor must follow the psychological or medical protocol consistent with those followed during in person CE visits as stated in the pertinent guidelines provided to each Contractor.
6. The Contractor must inform the Applicant of his/her location rendering services via telehealth (i.e., distant site) and obtain the location of the Applicant (i.e., originating site)
7. The Contractor will be notified of the telehealth location, the DES designated contact at the telehealth location and best way to contact that individual.

**Unanticipated Finding at a Telehealth Psychological CE examination**

On rare occasion, there is an unanticipated finding/occurrence at a telehealth examination. Should this occur, the following steps will be taken:

* The Contractor identifies that the client is in crisis or appears unstable and in need of emergency services.
* The Contractor will notify the DES contact at the telehealth location and they will coordinate an appropriate response/course of action.

The DES Manager of Business & Service Delivery Development (or designee) will assure that Contractors are informed of the requirements listed above for conducting and reporting CEs via telehealth techniques to provide telehealth services and will monitor adherence to these requirements on an ongoing basis.

Summary:

In order to enhance access for disability applicants with mental impairments, DES contracts with behavioral health professionals for consultative examinations using telehealth techniques. DES requires completion of training in specific related areas as well as standard procedures for contractors providing behavioral health CEs through use of telehealth.