



CalOptima Health

Initial Health Appointment (IHA)

Our Mission

To serve member health with excellence and dignity, respecting the value and needs of each person.

Our Vision

By 2027, remove barriers to health care access for our members, implement same-day treatment authorizations and real-time claims payments for our providers, and annually assess members' social determinants of health.

IHA

- Comprehensive assessment for **newly enrolled Medi-Cal members**
 - Must be completed by a **primary care provider (PCP)** within **120 days** of member enrollment into CalOptima Health and should **not** be completed by specialists
 - Components can be completed over the course of multiple visits
- **The Department of Health Care Services (DHCS) will:**
 - Measure primary care visits and screenings as a proxy for the IHA completion
 - Leverage Healthcare Effectiveness Data and Information Set (HEDIS) measures specific to adult preventive visits and infant/child/adolescent well-being visits
- **PCPs must document all efforts to complete the IHA, including:**
 - A minimum of **three** attempts during the first 120 days from enrollment, consisting of outreach efforts, missed visits and refusals to complete the IHA

IHA Requirements

- The standard screening requirements for each age group are still in effect
 - **All ages:** Assessment of need for preventive screenings or services as recommended by the United States Preventive Services Task Force (USPSTF)*
 - **Age 21 and under:** Early and Periodic Screening, Diagnostic and Treatment (EPSDT) screenings per American Academy of Pediatrics/Bright Futures periodicity schedule.** When requested, an appointment must be made for members under the age of 21 within 10 working days of the request***

* [USPSTF Guidelines](#) **As referenced in [APL 23-005](#) *** CalOptima Health DHCS 2024 Contract, Exhibit A: Section 5.3.3

IHA Requirements (cont.)

- IHA components include, but are not limited to:
 - A physical exam and office visit date
 - Physical and mental health history
 - Identification of health risks
 - Preventive screenings or services
 - Diagnosis and a plan for treatment for any diseases
 - Health education

Resources

- Identify members due for IHA
 - Obtain monthly list from health network
 - Access information on **Provider Portal**
- **IHA Report**
 - Full list of members who are due for IHA
 - Once logged into Provider Portal, click on “Reports” > select “Initial Health Appointment” from the drop-down menu > input provider details > click “Get IHA Report” to download the excel document
- **PCP Member Roster**
 - If a member has pending IHA, a date will be populated in the IHA Due Date column
 - Once logged into Provider Portal, click on “Reports” > select “PCP Member Roster” > input provider details > click “Get Member Roster” to download the Excel document

Resources (cont.)

Direct link	Access Path from www.caloptima.org
IHA Reference Guide for PCPs	Providers → Resources → Health Education → View IHA Reference Guide
Health and Wellness page	Members → Health and Wellness → Self-Care Guides
Health and Wellness Referral Form	Providers → Resources → Common Forms → Find under “H”
Wellness Programs and Services page	Members → Wellness Programs
Member Health Rewards Program	Members → Wellness Programs → Member Health Rewards
Blood Lead Refusal Form (English)	Providers → Resources → Common Forms → Anticipatory Guidance (multiple languages available)
Initial Health Appointment CME/CE — Recording	CalOptima Health’s YouTube page
iha@caloptima.org	Contact for questions or comments on the Initial Health Appointment



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