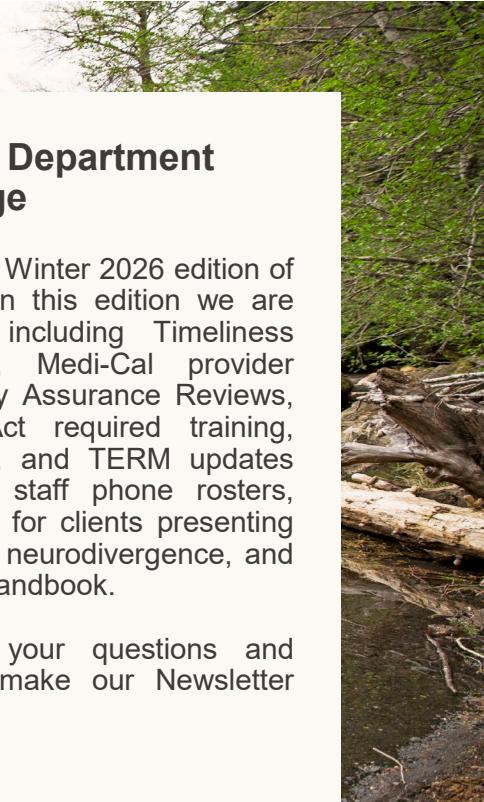


OPTUMIST

V50. Winter 2026



Provider Services Department Message

Greetings and welcome to the Winter 2026 edition of the OPTUMIST Newsletter! In this edition we are highlighting several topics including Timeliness Record Form submissions, Medi-Cal provider enrollment, Medication Quality Assurance Reviews, the 2026 False Claims Act required training, electronic claims submission, and TERM updates including access to CFWB staff phone rosters, treatment plan considerations for clients presenting with developmental delays or neurodivergence, and the updated TERM Provider Handbook.

We continue to welcome your questions and feedback on how we can make our Newsletter valuable to you.

Best wishes,

Provider Services Department

Contact Numbers

San Diego Access and Crisis Line

(888) 724-7240

Medi-Cal Provider Line

(800) 798-2254

TERM Provider Line

(877) 824-8376



optumsandiego.com

Newsletter Content

- **P2:** Information and Updates for FFS Medi-Cal Providers
- **P5:** QI Corner – Medication Quality Assurance Reviews
- **P6:** Information and Updates for FFS Medi-Cal and TERM Providers
- **P7:** Information and Updates for TERM Providers
- **P13:** San Diego Access and Crisis Line
- **P15:** Recruitment for FFS Medi-Cal and TERM Provider Networks

Information and Updates for FFS Medi-Cal Providers

Reminders from Utilization Management (UM)



Timeliness Record Form Submissions

Please submit a Timeliness Record Form by the client's second appointment.

- The form and accompanying Tip Sheet are available on the Optum San Diego website at optumsandiego.com (Fee for Service Providers → SMHS Authorization Requests), or by clicking [here](#).
- **IMPORTANT:** Complete the form directly on the website. The online version includes built-in rules to ensure all required information is captured. If you download and/or save an older version for offline use, these rules will not apply, and your submission may be incomplete.
- If your submission is incomplete, UM will notify you and request resubmission with the missing information.

Review - Medication Quality AssuranceReview - OutpatientSMHS Authorization RequestsTemplates and Examples

SMHS Authorization Requests

[Ancillary Specialty Mental Health Services Request \(docx\)](#)

[Demographic Form Fill \(pdf\)](#)

[ECT Authorization Request Form 61.2025 \(pdf\)](#)

[FFS Medi-Cal Psychological Testing Request \(docx\)](#)

[Interpreter Services Request Form \(pdf\)](#)

[MFT Eligibility Verification Form \(pdf\)](#)

[Medication Services Timeliness Record \(pdf\)](#)

[Medication Services Timeliness Record - Tip Sheet \(docx\)](#)

[OAR Medication Services 4.16.25 \(docx\)](#)

[OAR Medication Services 4.16.25 \(pdf\)](#)

[OAR Psychotherapy 4.16.25 \(docx\)](#)

[OAR Psychotherapy 4.16.25 \(pdf\)](#)

[Psychotherapy Timeliness Record \(pdf\)](#)

[Psychotherapy Timeliness Record - Tip Sheet \(docx\)](#)



We want to extend our sincere gratitude for your continued flexibility and commitment in submitting forms promptly. Your efforts play a vital role in ensuring smooth operations and timely care for our members.

If you have any questions, please contact our Provider Line, Monday through Friday, 8am to 5pm, at (800) 798-2254, Option 3, then Option 4.

Information and Updates for FFS Medi-Cal Providers

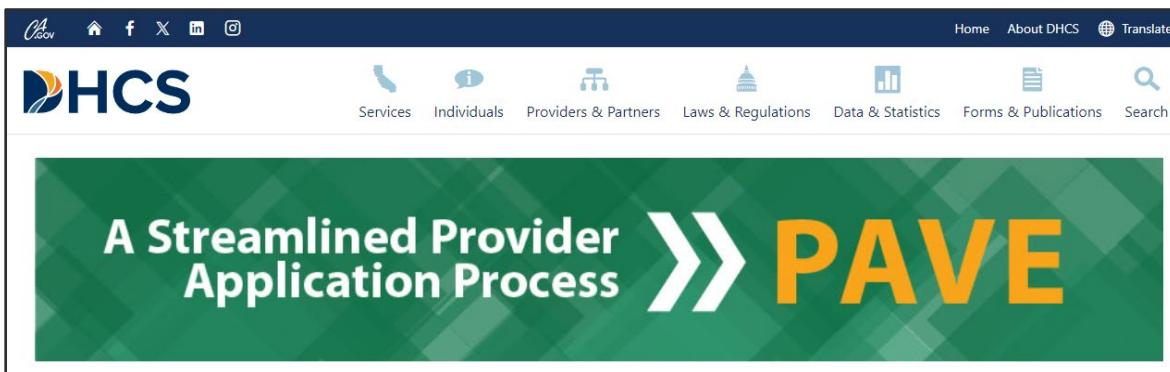
Medi-Cal Enrollment Through the Provider Application and Validation for Enrollment (PAVE) Portal

Medi-Cal Provider Enrollment:

As a reminder, all providers applying to render services to Medi-Cal Beneficiaries through the San Diego County Fee For Service (FFS) Medi-Cal Network must be enrolled in the Medi-Cal Program.

The Provider Services Department will assist in facilitating the enrollment process and a representative may be contacting you to enroll in the Medi-Cal program through the PAVE system.

We appreciate your cooperation and collaboration in this process as it is essential to ensure continued services to this vulnerable population which you serve.



What is PAVE?

The PAVE portal is the Provider Enrollment Division's (PED) web-based application designed to simplify and accelerate enrollment processes. PAVE is an interactive, web-based solution for the provider types who enroll with Medi-Cal through PED and manage their Medi-Cal accounts securely online. Providers can utilize the portal to complete and submit applications, report changes to existing enrollments, and respond to PED-initiated requests for continued enrollment or revalidation. PAVE features secure login, document uploading, electronic signature, application progress tracking, intuitive guidance, social collaboration and much more.

Click [here](#) to access PAVE Frequently Asked Questions

Information and Updates for FFS Medi-Cal Providers

Contact Us

The Provider Line is available for you from 8am – 5pm Monday through Friday.



(800) 798-2254

- Press 2 for Claims/Billing Questions
- Press 3 for Authorization
 - Press 3 for FFS Outpatient Determinations (*Clinical Questions*)
 - Press 4 for FFS Outpatient Administrative Services (*Authorization Questions*)
- Press 7 for Provider Services



This information is also available to you on our website: optumsandiego.com



QI Corner

Medication Quality Assurance Reviews

To ensure County prescribing guidelines are being met for Medi-Cal outpatient fee-for-service prescribers, the following are reviewed for each client requested for the medication quality assurance review:

- Initial evaluation
- Last six (6) services including labs
- Updated medication list



The Medication Quality Assurance Tools can be found below:

[**Child MQA Tool**](#)

[**Adult MQA Tool**](#)

Review areas include, but are not limited to:

- Medication rationale and dosage consistent with community standards
- Appropriate labs
- Consideration of physical health conditions
- Effectiveness of medication(s) prescribed
- Adverse drug reactions and/or side effects
- Evidence of signed informed consent
- Client adherence with prescribed medication and usage
- Client medication education and degree of client knowledge regarding management of medications
- Adherence to state laws and guidelines



Have Questions? Email us at: SDQI@optum.com

Information and Updates for FFS Medi-Cal & TERM Providers

Required Annual Training: False Claims Act 2026



Optum and the County of San Diego believe FFS/TERM Network Providers are an integral part of ensuring that there are prevention strategies in place to protect clients, providers and stakeholders from fraud, waste and abuse.

Through prevention, early detection, investigation and ultimate resolution, we support quality of care and sound clinical practices required by the Federal and State False Claims Act.

As a provider on the FFS/TERM Networks, you have access to Federal and State False Claims Act training and are expected to review it annually. The training can be accessed on the County website and by [clicking here](#).

This communication serves to remind you of your responsibility to complete the County of San Diego False Claims Act training for 2026.

Have Questions? Contact the Provider Services Department
(800) 798-2254, Option 7 sdu_providerserviceshelp@optum.com

Apply Today to Submit Electronic Claims



Streamline Your Claims Process!

Are you ready to simplify your billing process, reduce paperwork, and get paid faster? Join our network of providers who are already benefiting from submitting electronic claims.

Why submit electronic claims?

- ✓ Faster processing and reimbursement
- ✓ Fewer errors and rejections
- ✓ Secure and HIPAA-compliant
- ✓ Environmentally friendly – go paperless!

Ready to Apply or Have Questions?

Contact the Claims Department
(800) 798-2254, Option 2

Note: Healthcare organizations and businesses that bill using the organization's name and Employer Identification Number (EIN) must obtain a Type 2 National Provider Identifier (NPI). To apply for a Type 2 NPI **at no cost**, visit the [NPPES website](#), create an account if you do not already have one, and follow the prompts to apply for an organizational NPI Type 2.

Information and Updates for TERM Providers

Optum TERM At a Glance

Access to CFWB Staff Phone Rosters

- To maintain the security of the CFWB staff phone rosters on the Optum website, access now requires providers to register and log in to the TERM Secure Documents page of the website. Registration and access instructions are shared.

Treatment Plan Considerations for Clients

Presenting with Developmental Delays or Neurodivergence

- Differential diagnostic considerations and integration of developmental considerations into CFWB treatment plan documentation are discussed.

Updated TERM Provider Handbook

- The TERM Provider Handbook has been updated and can be found on the Optum website. A summary of revisions is provided, along with instructions on accessing the document online.



UPCOMING TRAINING OPPORTUNITIES

- **January 30, 2026:** Understanding Child and Family Well-Being and the Juvenile Dependency Process. Virtual training from 8am-12:30pm by TERM partners (CEU's available). Please RSVP to: tina.garcia@optum.com; include "RSVP" in the subject line and your name and license number in your message.

*Listed trainings are for informational purposes only. While topics may be relevant to TERM providers, they are not 'TERM approved/recommended' offerings.



QUICK LINKS

- [TERM Provider Handbook](#)
- [TERM Group Report Facesheet](#)
- [TERM Treatment Plan Documentation Resources](#)
- [IPV-V Group Treatment Standards](#)
- [CSA-NPP Treatment Standards](#)
- [Format & Required Elements of a CFWB Psychological Evaluation](#)
- [TERM Therapy Provider FAQ](#)
- [FAQ For CFWB Evaluations](#)
- [Claims Resources for TERM Providers](#)
- [TERM Therapy Provider Telehealth Best Practices](#)
- [Request for Additional CFT Meeting Units](#)
- [Temporary Change of Authorization](#)



TERM Advisory Board Provider Representatives

The TERM Advisory Board meets quarterly to provide professional input regarding the performance of the system and its policies, procedures, and protocols.

Representation on the Board includes San Diego County HHSA Behavioral Health Services, Child Welfare Services, Probation Department, Juvenile Court, Public Defender Juvenile Delinquency Branch, District Attorney, County Counsel, Dependency Legal Services, Children's Legal Services, Optum, TERM Provider Panel, Youth and Parent Partners.

Current TERM Provider Representatives on the Board:

Michael Anderson, Psy.D.: drmike6666@gmail.com

Denise VonRotz, LMFT: dvonrotz@msn.com

Please feel free to contact your provider representatives for updates from the Advisory Board meetings, process improvement ideas, or to provide professional or client feedback.

Information and Updates for TERM Providers

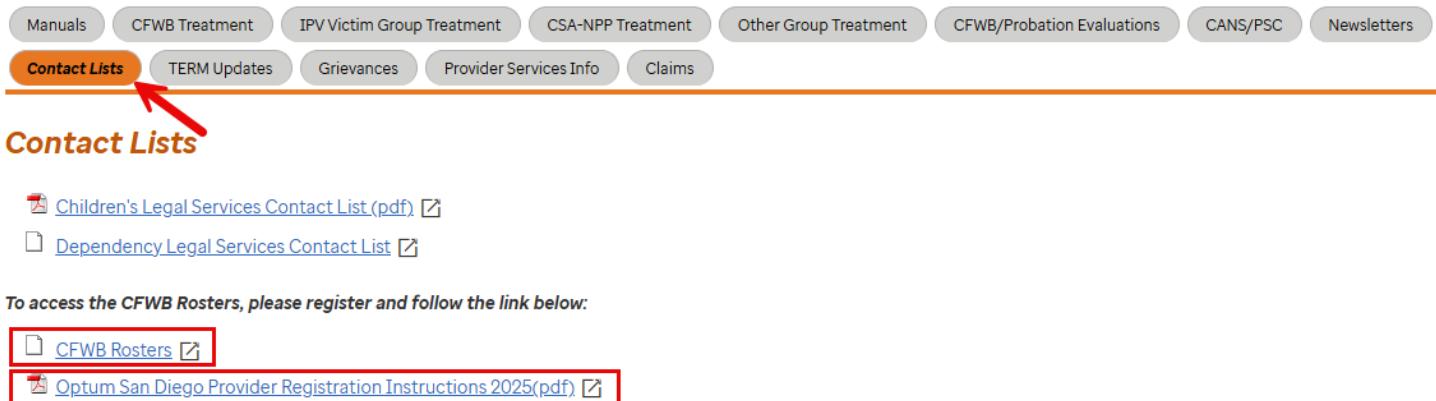


Access to CFWB Staff Phone Rosters on Optum Website

As a follow up to the email blast that was sent to the TERM provider panel in November 2025, there has been a recent change to the process for providers to access the Child and Family Well-Being (CFWB) staff phone rosters on the Optum San Diego website. To maintain the security of the documents, access now requires providers to register and log in to the TERM Secure Documents page of the Optum website.

Website registration instructions can be accessed on the Optum San Diego website by clicking [here](#). Once registration has been completed, the rosters are located under the [TERM Providers](#) section of the Optum San Diego website; select the Contact Lists tab and then CFWB Rosters.

If you would like further assistance with the registration process, please contact the Optum San Diego Support Desk at 800-834-3792 or sdhelpdesk@optum.com.



Manuals CFWB Treatment IPV Victim Group Treatment CSA-NPP Treatment Other Group Treatment CFWB/Probation Evaluations CANS/PSC Newsletters

Contact Lists TERM Updates Grievances Provider Services Info Claims

Contact Lists

 [Children's Legal Services Contact List \(pdf\)](#) 

 [Dependency Legal Services Contact List](#) 

To access the CFWB Rosters, please register and follow the link below:

 [CFWB Rosters](#) 

 [Optum San Diego Provider Registration Instructions 2025 \(pdf\)](#) 



Information and Updates for TERM Providers

CFWB Treatment Plan Documentation Considerations for Clients Presenting with Neurodivergence or Developmental Delays

TERM clinicians regularly provide treatment for children and parents impacted by trauma and abuse, some of whom may also have neurodivergence, intellectual disabilities, or other developmental delays. When approaching treatment for individuals with these diagnoses, it is essential to consider their cognitive, developmental, and neurodevelopmental profiles and how these factors influence their functioning and ability to engagement in treatment, as thoughtful integration of these considerations in the assessment and treatment approach can significantly improve outcomes.



Children with developmental delays or neurodivergence who have experienced trauma often present overlapping symptoms, which can present challenges to making an accurate diagnosis. Trauma can affect cognitive, language, social-emotional, motor, and adaptive functioning. Similarly, developmental disorders such as Autism Spectrum Disorder (ASD) share features that may resemble trauma responses. For example, sensory sensitivity in ASD can appear similar to trauma-related hypervigilance, while severe neglect may mimic autistic traits due to missed developmental milestones. This diagnostic overlap underscores the importance of comprehensive assessment and clear documentation on the Child and Family Well Being (CFWB) treatment plan.

Given the overlapping symptoms, TERM clinicians should include all known diagnoses and any rule-out considerations on the client's treatment plan. TERM clinicians should also document their differential diagnostic considerations, both at the initial assessment and in subsequent progress updates. While a diagnosis such as Autism Spectrum Disorder or Attention Deficit Disorder may not be the TERM clinician's primary focus of treatment, they can significantly influence a client's ability to engage in and benefit from therapy. Documentation should reflect how treatment strategies are adapted to align with the client's developmental, neurodevelopmental, and cognitive functioning. This approach supports accurate treatment planning and promotes better outcomes for clients.

TERM clinicians do not need to be experts in developmental disorders to provide effective trauma-informed care. However, integrating developmental considerations is essential to ensure treatment is responsive and supportive. Interventions can often be adapted to best support the client, such as adjustments to the pacing and length of treatment, inclusion of caregivers, collaboration with other treatment providers, and/or tailoring interventions to the client's specific verbal, social, and cognitive abilities. Any adjustments or adaptations made to treatment interventions should be reflected and supported in the documentation. Additionally, clinicians should carefully assess the appropriateness of telehealth for these clients and document their ability to engage effectively through this modality. By incorporating these practices, TERM clinicians can ensure that treatment is both trauma-informed and developmentally responsive, ultimately supporting better outcomes for clients and families.

Information and Updates for TERM Providers

CFWB Treatment Plan Documentation Considerations for Clients Presenting with Neurodivergence or Developmental Delays - *continued*

Additional resources offering guidance on tailoring trauma therapy for children with developmental delays are available through California Training Institute (CALTRIN) at www.caltrin.org, and through the National Child Traumatic Stress Network continuing education page at <https://www.nctsn.org/resources/training>, including free on-demand web-based trainings (some with free CEUs).



TERM Provider Handbook Updated January 2026

The [TERM Provider Handbook](#) has been revised to include relevant updates to Optum TERM policies and practices as of January 2026. The revised handbook can be found on the Optum San Diego website at optumsandiego.com under the TERM Providers section Manuals tab. When reviewing the handbook, please pay close attention to the following:

Updated Release of Information Protocol: The previous standing order from the Superior Court of CA Authorizing Optum to Disclose Therapy Treatment Plans and Evaluations of Children, Parents, and Guardians Receiving Services from HHSA to HHSA CWS Representatives has been vacated. The current process is that CFWB Protective Services Workers are required to ensure that a signed Form 04-29 Authorization to Use or Disclose Protected Health Information- Single Providers (ROI) is in place with the provider to allow for the exchange of confidential information. This includes the ability to discuss treatment needs, ongoing progress, and other relevant clinical details necessary to support the care and coordination of services for the client. Providers may request a copy from the client's Protective Services Worker and should also obtain their own release of information from their clients to release information to CFWB and Optum TERM.

Updated Guidance Regarding Audio Only Telehealth Treatment: The handbook and online resource [TERM Therapy Provider Telehealth Best Practices](#) have been updated to reflect recent changes in Medi-Cal guidelines regarding accommodating client preferences for audio only sessions balanced with best practice guidelines for CFWB involved clients.

Updated Intern Standards for Treatment and Evaluation Referrals and Authorizations: Updated standards can be found at optumsandiego.com > Join the Provider Network button > Interns, attached to the [Optum Intern Application Packet](#).

Information and Updates for TERM Providers

TERM Provider Handbook Updated January 2026 - *continued*

Updated Information for Evaluators Regarding Referral and Authorization Process and No-Show Consideration Fee: Referring parties from the dependency and juvenile justice system have approved a no-show consideration fee for TERM evaluators accepting referrals through the TERM process in recognition of the amount of time reserved for an evaluation appointment and potential financial impact when a client does not show for the scheduled appointment. The consideration fee is applicable only once to the assigned evaluator per client, and evaluators are expected to make a good faith effort to re-schedule clients.

Removed References to Group Therapy Reports Not Submitted to Optum: As of January 2025, all TERM individual and group therapy treatment plans are to be submitted to Optum TERM for tracking purposes. TERM continues to provide quality oversight only to individual and conjoint therapy reports, and Intimate Partner Violence Victim and Child Sexual Abuse Non-Protecting Parent Group therapy reports. Information was also updated related to reimbursement guidelines for unscheduled treatment progress reports.

Updated Guidance on the Role of the Therapist/Scope of Practice in CFWB Treatment: Best practice guidelines for the role of a TERM provider in disclosing sensitive case information to clients were added in alignment with guidance set forth in CFWB's mental health policy.

Updated Guidance on In-Home Treatment for Clients: Expanded the definition of In-Home Treatment to include all Community Based Treatment Locations based on the TERM provider's assessment for clinical appropriateness, and how to communicate and document alternative setting locations.

Updated Reauthorization Process: Updated guidance was added to reflect that individual and conjoint therapy can be reauthorized at weekly or biweekly sessions based on the PSW's request.

Updated Guidance on Referral and Authorization Process for Medi-Cal Funded Cases: Medi-Cal funded therapy cases are now automatically authorized for Targeted Case Management and Team Meeting units at the time of authorization and providers do not need to request these additional units through the outpatient authorization request process. The process of notifying providers of authorization determinations for Medi-Cal funded cases has also been updated; for continuing authorizations, providers will be sent the Medi-Cal authorization letter within fourteen (14) days of receipt or denial paperwork within three (3) days of denial.

Updated Guidance on Treatment Plan Documentation Requirements: CFWB has implemented changes to their Therapy Referral Forms and Treatment Plan Form for Children and Parents. Updated guidance was added to align with the current documentation standards for the new forms.

Information and Updates for TERM Providers

TERM Provider Handbook Updated January 2026 - *continued*

Updated Guidance on Probation Reports and Services: The handbook was updated to reflect current procedures for how providers can access interpreter services, request reimbursement for court testimony, and obtain payment for report addendums for Probation referred clients. Updated information pertaining to referrals for in-custody evaluations has also been included.

Shift from Serious Incident Reporting to Critical Incident Reporting: The handbook was updated to reflect new language and guidelines regarding critical incident reporting requirements.



Questions about the updated handbook?

Please contact the TERM Department at (877) 824-8376, Option 1

San Diego Access and Crisis Line



We are here for you

The San Diego Access and Crisis Line (ACL) is an outstretched hand to individuals of all ages or people they know, who are overwhelmed, depressed or searching for answers.

A phone call will connect you with a compassionate professional who is always standing by to provide hope and encouragement.

We can help when:

- You need to talk to a professional who cares
- You do not feel you can cope with life
- You are looking for community resources
- You are concerned someone you know might hurt themselves
- You feel you might be in danger of hurting yourself or others



optumsandiego.com



San Diego Access and Crisis Line

Free assistance 7 days a week, 24 hours a day
Available in all languages

888-724-7240

TDD/TTY 711

optumsandiego.com



If you or someone you know is in crisis, help is available nationwide. Call or text **988**, or chat at 988lifeline.org.

Optum



Funding for services is provided by
County of San Diego Health & Human Services
Agency

317028-022024
ACL TRIFOLD-ENGLISH ©2024 Optum

San Diego Access and Crisis Line

Free assistance 7 days a week, 24 hours a day



We are here for you

888-724-7240

TDD/TTY 711

San Diego Access and Crisis Line



888-724-7240

**Free, confidential support
in all languages**

- 24 hours a day
- 7 days a week



**Online Chat Services
are available**

- Monday through Friday
- 4 p.m. to 10 p.m.



About us

The San Diego Access and Crisis Line (ACL) is operated by Optum and has offered San Diego County residents free, confidential, brief support and community resources since 1997.

Our staff are trained mental health professionals who provide compassionate and knowledgeable support to those we serve.

About our services

- Free, confidential support for all ages
- Crisis intervention
- Suicide prevention, intervention, and postvention
- Referrals for mental health, alcohol and/or drug needs
- Referrals to other related resources
- Mobile Crisis Response screening

Who we can help

- Individuals of all ages who are struggling with mental health or substance use related concerns
- Family members or friends who are concerned about someone
- People who are thinking about harming themselves or others
- Professionals seeking resources for their clients

Wellness plan

**"If I need help, what can I do?"
Reach Out!**

Access and Crisis Line: **888-724-7240**

Family/friend: _____

Therapist: _____

Doctor: _____

Clergy: _____

Other support: _____

**Call 911 if this is a
life-threatening emergency.**

San Diego Access and Crisis Line

Free assistance 7 days a week, 24 hours a day

**We are here for you
888-724-7240
TDD/TTY 711**

We Are Recruiting!

Contracting for Two Networks:



Fee-for-Service (FFS) Medi-Cal Provider Network

Specialty Mental Health Services:

- Advanced Outpatient Services
- Psychiatric Consultations
- Medication Management
- Psychological Testing



Treatment & Evaluation Resource Management (TERM) Provider Network

Child and Family Well-Being & Juvenile Probation Systems Services:

- Specialized Therapy
- Forensic Evaluations

Growing our richly diverse provider networks

Seeking:

- Master's Level Clinicians
- Psychologists
- Psychiatrists
- Psychiatric Nurse Practitioners
- Psychiatric Physician Assistants

Gain Supportive Solutions:

As a Contracted Provider, Optum is with you every step of the way.

We are here for you through personalized:

- Collaboration
- Courtesy Reviews
- Referrals
- Claims Processing & Payments
- And more!

What providers are saying:

"Optum was positive and collaborative."

"I never have to wait on hold for long periods of time which is appreciated."

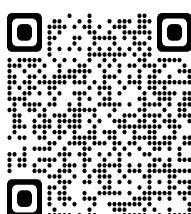
"Provider Services staff is always friendly, responds quickly and offers help with all situations/questions. Thank you."



LIVE WELL
SAN DIEGO

Optum serves as the Administrative Service Organization for the County of San Diego Behavioral Health Services.

Are You Ready to Be Part of the Solution? Learn More Today!



Tina Garcia, Provider Recruiter

(619) 641-5308

tina.garcia@optum.com

optumsandiego.com