

Assessment & Plan Due Dates¹ (see exceptions below)

Episode Opening Month	Initial Assessment Due	Initial Plan Created, Signed, and Due in:	Annual Plan & Assessment Created And Signed In:
January	60 Days	60 Days	Dec.
February	60 Days	60 Days	Jan.
March	60 Days	60 Days	Feb.
April	60 Days	60 Days	March
May	60 Days	60 Days	April
June	60 Days	60 Days	May
July	60 Days	60 Days	June
August	60 Days	60 Days	July
September	60 Days	60 Days	Aug.
October	60 Days	60 Days	Sept.
November	60 Days	60 Days	Oct.
December	60 Days	60 Days	Nov.

¹ The Assessment is due by 60 days from episode opening date unless required sooner. Programs that have an earlier due dates for the completed full MH Assessment include:

- Day Rehab & Day Treatment Intensive (by day 7),
- Crisis Residential & Adult Residential (by days 7),
- and Inpatient services (within 72 hours of EOD).
- Before TBS behavioral interventions can be billed, both a TBS assessment and TBS plan must be completed.
- If the full MH Assessment is unable to be completed in the required timeframe due to clinical issues—the provider should document that in the record and may continue to claim for Unplanned services (see below). If the Client Plan is already completed, the full MH Assessment must also be completed for Planned Services to be claimed beyond the MH Assessment due date. Exceptions to this extension are based on program type with specific firm Assessment Due dates as indicated above.

The Client Plan is due by 60 days from the EOD with the following exceptions:

- It is not required for Crisis Stabilization Services (<24 hrs).
- Inpatient MH Services: plan is due within 72 hours—excluding Saturday and Sunday, signed by MD and client (or reason client refused) WITH a completed full MH Assessment
- Crisis Residential and Adult Residential: 72 hours (NOT excluding Saturday and Sunday), signed by LPHA and Client (or reason Client refused) WITH either a completed full MH Assessment or an Interim MH Assessment (described below).
- Day Rehabilitation & Day Treatment Intensive: First billed day, signed by LPHA and Client (or reason Client refused) WITH either a completed full MH Assessment or an Interim MH Assessment.