

## PROVIDER MEMO

**Date:** May 15, 2023

**Subject:** Initial Health Appointments for Your Medi-Cal Patients  
APL 22-030

Dear Provider:

As part of the Population Health Management (PHM) Program, the Department of Health Care Services (DHCS) has made changes to the Initial Health Assessment process for your Medi-Cal patients. Effective January 1, 2023, Initial Health Assessments are now referred to as Initial Health Appointments (IHAs). Initial Health Appointments are performed by the patient's primary care physician or another provider in the primary care medical setting and must be completed within 120 days of enrollment and periodically re-administered.

The Initial Health Appointment must be conducted in a cultural and linguistic manner appropriate for each patient, and the following must be included in the patient's medical record:

- A history of the patient's physical and mental health
- An identification of risks
- An assessment of need for preventive screens or services
- Health education
- The diagnosis and plan for treatment of any diseases

Initial Health Appointments no longer require the Individual Health Education Behavioral Assessment (IHEBA) or Staying Healthy Assessment (SHA).

An Initial Health Appointment is not necessary if the primary care provider determines that the patient's medical record contains complete information that was updated in the previous 12 months.

Reference: [DHCS APL 22-030 \(ca.gov\) Initial Health Appointment](#)

Thank you for your attention to this matter.