

## MOU Annual Reporting Template Instructions

Pursuant to the Behavioral Health Information Notices (BHINs): 23-056, 23-057, 24-016, Behavioral Health Delivery Systems (BHDS) are required to execute a Memorandum of Understanding (MOUs) with the Medi-Cal Managed Care Plans (MCPs) operating in their county, and submit an annual MOU report to the Department of Health Care Services (DHCS) electronically to [BHOMDMonitoring@dhcs.ca.gov](mailto:BHOMDMonitoring@dhcs.ca.gov) by the last business day of January.

### MOU Annual Report

**MOU Quarterly Update tab:** The MOU Annual Report must include updates from the quarterly meetings with the MCPs; use one row to document each quarterly meeting. This report is not intended to duplicate the MOU quarterly reports where BHDS demonstrates a good faith effort to execute MOUs.

**MOU Annual Review tab:** Documents the results of the annual MOU review. Counties should summarize the BHDS's annual review process, including amendments made to the MOU and/or policies and procedures, as well as the outcomes of the review. Counties have the option to document one annual review per row for each MCP or combine the annual reviews of multiple MCPs in a single row.

**Do not include Members' Personal Health Information (PHI) or any other confidential information in the report.**

### Attestation

Pursuant to BHINs: 23-056, 23-057, and 24-016, BHDS and MCPs are required to coordinate medically necessary services, including health-related social services needs, when members are accessing services from the applicable Medi-Cal Delivery Systems. **The County must indicate the number of times BHDS and MCPs have conducted quarterly meetings within the specified year.**

BHDS must attest to completing the Annual Review of the BHDS Quarterly MOU Reporting for the specified year. BHDS must also certify that all information in this report is true, accurate, and complete to the best of their knowledge. Please see the Attestation tab for instructions.

Unless otherwise noted in the instructions below, please do not include attachments with your report, as unsolicited attachments will not be accepted. If you have additional questions or concerns, please contact the [BHOMDMonitoring@dhcs.ca.gov](mailto:BHOMDMonitoring@dhcs.ca.gov) mailbox or your assigned county liaison.

MOU Annual Report Update	
Column Name	Explanation
<b>County (Column A)</b>	Enter the County Name.
<b>Plan Code (Column B)</b>	Select the plan code from the drop-down list. Use the plan code directory tab for reference. Selecting the Plan Code will automatically populate the associated MCP Plan Name in Column C.  MHP/DMC-ODS/DMC that operate in more than one county should report on all counties within one MOU Quarterly Report by reporting separate rows for each applicable plan code.
<b>MCP Plan Name (Column C) (Auto Populates)</b>	This column will be automatically populated with the County when the associated Plan Code is entered into Column B. No action is needed in this column.
<b>MOU Effective Date (Column D)</b>	Enter the effective date of the Executed MOU. The effective date is the date that the MOU went into effect.
<b>Reporting Year (Column E)</b>	Enter the corresponding reporting year for the data reported using the drop down list provided.
<b>Combined MOU (Column F)</b>	Is the MOU a combination of more than one delivery system? Select "Yes" or "No" from the drop-down menu.
<b>MOU Type (Column G)</b>	Select the MOU type from the drop-down list. If the BHDS has executed MOUs with multiple MCPs for the same MOU type, report each on a separate row. List all individual executed MOUs..
<b>Meeting Attendees (Column H)</b>	Provide a list of all attendees including MCP responsible person(s), leadership, and county executives during the quarterly meetings.
<b>MOU Quarterly Updates Tab: (Column I) Topic: Care Coordination</b>	Describe the common themes, concerns, and/or discussion items from the Quarterly Meetings regarding care coordination, eligibility, screening, assessment, evaluation, and/or Medical Necessity determination. If any care coordination-related changes were made (to the MOU, processes, and/or policies and procedures) based on these discussions, please note those changes in this section. If this topic was not discussed at the meeting(s), then provide an explanation. Limit responses to 1000 characters.
<b>MOU Annual Review Tab: (Column I) Summary of Annual Review Process</b>	Provide a summary of the annual review activities conducted by the county.
<b>MOU Quarterly Updates Tab: (Column J) Topic: Referrals</b>	Describe the common themes, concerns, and/or discussion items from the Quarterly Meetings regarding referrals. If any referral-related changes were made (to the MOU, processes, and/or policies and procedures) based on these discussions, please note those changes in this section. If this topic was not discussed at the meeting(s), then provide an explanation. Limit responses to 1000 characters.
<b>MOU Annual Review Tab: (Column J) Outcome of the Review Process</b>	Provide a summary of the review process.
<b>MOU Quarterly Updates Tab: (Column K) Topic: Dispute Resolution</b>	Describe any significant disputes between the parties that were discussed at the Quarterly Meetings. What was the resolution? If the dispute is still unresolved, what are the next steps towards resolving the matter? If any changes regarding dispute resolution were made (to the MOU, processes, and/or policies and procedures) based on these discussions, please note those changes in this section. If this topic was not discussed at the meeting(s), then provide an explanation. Limit responses to 1000 characters.
<b>MOU Annual Review Tab: (Column K) MOU Amendment? (Attach supporting documents)</b>	Select "Yes" or "No" from the drop-down menu. If yes, provide copies of any modified or renewed MOUs.
<b>MOU Quarterly Updates Tab: (Column L) Strategies to Avoid Duplication of Services</b>	Describe the common themes, concerns, and/or discussion items from the Quarterly Meetings regarding strategies to avoid duplication of services. If any changes regarding duplication of services were made (to the MOU, processes, and/or policies and procedures) based on these discussions, please note those changes in this section. If this topic was not discussed at the meeting(s), then provide an explanation. Limit responses to 1000 characters.
<b>MOU Annual Review Tab: (Column L) Additional information (Optional)</b>	Provide any additional information the county may have regarding the MOU annual review. <b>Note:</b> Additional information is optional.
<b>Collaboration (Column M)</b>	Describe any discussion at the Quarterly Meetings regarding effective collaboration between the MCP and Other Party, including strengths, barriers, and plans for improvement. If any changes regarding collaboration between BHDSs and MCPs were made (to the MOU, processes, and/or policies and procedures) based on these discussions, please note those changes in this section. If this topic was not discussed at the meetings(s), then provide an explanation. Limit responses to 1000 characters.
<b>Member Engagement (Column N)</b>	Describe any discussion at the Quarterly Meetings regarding Member engagement challenges and successes. If any changes regarding Member Engagement were made (to the MOU, processes, and/or policies and procedures) based on these discussions, please note those changes in this section. If this topic was not discussed at the meetings(s), then provide an explanation. Limit responses to 1000 characters.

MHP/DMC-ODS/DMC Counties	MCP Plans	Plan Code	MHP/DMC-ODS/DMC Counties	MCP Plans	Plan Code	MHP/DMC-ODS/DMC Counties	MCP Plans	Plan Code
Alameda	Alameda Alliance for Health	531	Merced	Central California Alliance For Health	514	Solano	Partnership Health Plan of California	504
	Kaiser Permanente	670		Modoc	Partnership Health Plan of California		519	Kaiser Permanente
Alpine	Anthem Blue Cross Partnership Plan	385	Mono	Anthem Blue Cross Partnership Plan	109	Sonoma	Partnership Health Plan of California	513
	Mountain Valley Health Plan	377		Health Net Community Solutions, Inc.	383		Kaiser Permanente	657
Amador	Anthem Blue Cross Partnership Plan	101	Monterey	Central California Alliance For Health	508	Stanislaus	Health Net Community Solutions, Inc.	361
	Health Net Community Solutions Inc.	380		Napa	Partnership Health Plan of California		507	Health Plan of San Joaquin
	Kaiser Permanente	125	Kaiser Permanente	652	Kaiser Permanente	375		
Butte	Partnership Health Plan of California	543	Nevada	Partnership Health Plan of California	546	Sutter-Yuba	Partnership Health Plan of California	550/552
	Anthem Blue Cross Partnership Plan	103		Orange	CalOptima Health		506	Kaiser Permanente
Calaveras	Health Net Community Solutions Inc.	381	Placer-Sierra	Partnership Health Plan of California	547/549	Tehama	Partnership Health Plan of California	551
	Partnership Health Plan of California	544		Kaiser Permanente	662		Trinity	Partnership Health Plan of California
Colusa	Contra Costa Health Plan	532	Plumas	Partnership Health Plan of California	548	Tulare		Health Net Community Solutions, Inc.
	Kaiser Permanente	671		Riverside	Molina Healthcare of California		355	Kaiser Permanente
Contra Costa	Partnership Health Plan of California	523	Riverside	Inland Empire Health Plan	305	Tuolumne	Anthem Blue Cross Partnership Plan	311
	Anthem Blue Cross Partnership Plan	386		Kaiser Permanente	370		Health Net Community Solutions, Inc.	384
Del Norte	Mountain Valley Health Plan	378	Sacramento	Anthem Blue Cross Partnership Plan	190	Ventura	Anthem Blue Cross Partnership Plan	116
	Kaiser Permanente	387		Health Net Community Solutions, Inc.	150		Gold Coast Health Plan	515
Fresno	Anthem Blue Cross Partnership Plan	362	San Benito	Kaiser Permanente	191	Yolo	Partnership Health Plan of California	509
	Kaiser Permanente	365		Molina Healthcare of California	130		Kaiser Permanente	660
	CalViva Health	315	San Bernardino	Central California Alliance For Health	553			
Glenn	Partnership Health Plan of California	545		Molina Healthcare of California	356			
Humboldt	Partnership Health Plan of California	517	San Diego	Inland Empire Health Plan	306			
	Community Health Plan of Imperial Valley	533		Kaiser Permanente	371			
Imperial	Kaiser Permanente	672	San Francisco	Blue Shield of California Promise Health Plan	167			
	Anthem Blue Cross Partnership Plan	107		Molina Healthcare of California	131			
Inyo	Health Net Community Solutions Inc.	382	San Joaquin	Kaiser Permanente	192			
	Anthem Blue Cross Partnership Plan	379		Community Health Group Partnership Plan	29			
Kern	Kaiser Permanente	366	Santa Barbara	Anthem Blue Cross Partnership Plan	343			
	Kern Family Health Care	303		Kaiser Permanente	372			
	Anthem Blue Cross Partnership Plan	363	Santa Clara	San Francisco Health Plan	307			
Kaiser Permanente	367	Health Net Community Solutions, Inc.		354				
Kings	CalViva Health	316	Santa Cruz	Health Plan San Joaquin	308			
	Partnership Health Plan of California	511		Kaiser Permanente	373			
Lake	Partnership Health Plan of California	518	Shasta	Partnership Health Plan of California	520			
	Partnership Health Plan of California	518		Siskiyou	Partnership Health Plan of California	521		
Lassen	Health Net Community Solutions, Inc.	352						
	L.A. Care Health Plan	304						
Los Angeles	Kaiser Permanente	368						
	Anthem Blue Cross Partnership Plan	364						
Madera	Kaiser Permanente	369						
	CalViva Health	317						
Marin	Partnership Health Plan of California	510						
	Kaiser Permanente	650						
Mariposa	Central California Alliance For Health	554						
	Kaiser Permanente	651						
Mendocino	Partnership Health Plan of California	512						

Number of Quarterly Meetings held: [Arthem=4; Kaiser=3; SFHP=4]  
 Provide an Explanation if fewer than four (4) quarterly meetings were held: Early 2023 coordination & meetings with Kaiser focused on initiating the relationship, ensuring a firm understanding of MOU and data sharing, and confirming appropriate responsible parties. Beginning with the first official Kaiser/BRP quarterly meeting in May 2023, a regular quarterly meeting cadence was established and

County Name	Plan Code	MCP Plan Name (and Position)	Reporting Year	Contract MOU Year No	MOU Type	Meeting Attendees	Topic: Care Coordination	Topic: Referrals	Topic: Dispute Resolution	Topic: Strategies to Avoid Duplication of Efforts	Topic: Collaboration	Topic: Member Engagement
San Francisco	343	Arthem Blue Cross Partnership Plan	2025	Yes	SMHS/DAC-CDS	<p><b>SF County:</b>                      Alexis Martin, BHS Director of Quality Management                      Alexander Jackson, BHS Adult and Elder Adult Deputy Director                      Anna O'Neil, BHS Director of Education Management                      Chai Valentinou, BHS Director of Data, Analytics, and Evaluation                      Heather Holsinger, BHS Director of Office of Care and Health Equity                      Inna Morozov, BHS Director of Managed Care                      Inessa Chepur, BHS Director of Central Access and Eligibility                      Janelle Thompson, BHS Managed Care Executive Assistant                      Melinda Hill, BHS Managed Care Health Care Analyst                      Nancy Yu, BHS Regulatory Affairs Manager</p> <p><b>Arthem:</b>                      Christina Ford, Arthem Representative                      Eric Schrammer, Arthem Representative                      Farah Bhatti, Arthem Behavioral Health Program Manager                      Kelli MacNeil, Arthem Program Manager                      Patricia Lopez, Arthem Behavioral Health Care Manager                      Sarah Parker, Arthem Behavioral Health Director</p> <p><b>Quarterly meeting dates:</b>                      March 28, 2023 (Q1 2023)                      June 9, 2023 (Q2 2023)                      September 8, 2023 (Q3 2023)                      December 8, 2023 (Q4 2023)</p>	<p>Core coordination was discussed during 2023 quarterly meetings with Arthem BHS including coordination between non-specialty and specialty mental health services and transitions of care. Discussions focused on information sharing, use of screening and transition look required by CHCS guidance, and clarification of role between the MCP and SF County Behavioral Health.</p>	<p>Referral processes were discussed in relation to screening, transition of care, and CHCS requirements, including Clinical and Referral operations. Arthem and SF County Behavioral Health reviewed existing referral pathways, referral tracking, and challenges related to using members and confirming referral outcomes.</p>	<p>Formal dispute resolution was reviewed as part of MOU oversight. No disputes requiring escalation under the dispute resolution provisions of the MOU were identified during the 2023 meetings. Operational concerns were addressed through discussion, clarification, and follow-up.</p>	<p>Strategies to avoid duplication of services were discussed through identification of MCP versus BRP responsibilities, appropriate placement in non-specialty versus specialty mental health services, and coordination during transitions of care. Discussions emphasized alignment with screening and assessment requirements to support non-duplicative service delivery.</p>	<p>Collaboration was discussed through ongoing communications, review of MOU requirements, and coordination related to CareLink implementation, data sharing, and compliance with CHCS guidance. Quarterly meetings served as a forum for information sharing and identifying areas requiring further follow-up outside the meeting structure.</p>	<p>Member engagement was discussed, primarily in the context of data challenges, access to services, and ensuring members are connected to appropriate care through coordinated referral processes.</p>
San Francisco	372	Kaiser Permanente	2025	Yes	SMHS/DAC-CDS	<p><b>Kaiser:</b>                      Anita Chivers, Kaiser San Francisco County Behavioral Health Liaison and Clinical Consultant                      Caroline R. Cooley, Kaiser HealthCare Engagement Lead - San Francisco County                      Charlotte Carrasco, Kaiser San Francisco County Behavioral Health Liaison                      Christina Smith, Kaiser Behavioral Health Consultant                      Duane Nelson, Kaiser Behavioral Health Program Manager                      Jessica Chouhrouh, Kaiser MHA Quality Improvement Team                      Leah Williams, Kaiser Consultant, Behavioral Health Program - Care Coordination                      Li Anon, Kaiser Behavioral Health Consultant                      Terriya L. Ayres, Kaiser Behavioral Health Consultant                      Victoria Navarro-Gutierrez, Kaiser MOU Coordinator - San Francisco County</p> <p><b>Quarterly meeting dates:</b>                      May 6, 2023 - Q1 2023 Kaiser-SF County BRP Quarterly MOU Meeting                      August 1, 2023 - Q3 2023 Kaiser-SF County BRP Quarterly MOU Meeting                      November 18, 2023 - Q4 2023 Kaiser-SF County BRP Quarterly MOU Meeting</p>	<p>Core coordination was discussed in the context of required coordination between Kaiser (MCP) and SF BRP (SMHS/DAC-CDS), including transitions of care, coordination following treatment receipt, admissions and discharges, and alignment with CHCS screening and transition look and coordination of referral assistance. The "no wrong door" communication between systems and clarifying coordination responsibilities consistent with the MOU.</p>	<p>Referrals were discussed as part of required screening, assessment, and transition of care processes. Kaiser and SF BRP reviewed referral pathways between delivery systems, including use of required screening and transition look and coordination of referral assistance. The "no wrong door" approach was reinforced in relation to appropriate placement in non-specialty versus specialty mental health services.</p>	<p>Formal dispute resolution was not a primary topic of discussion in the 2023 Kaiser quarterly meetings. No disputes requiring escalation under the MOU dispute resolution provisions were identified. Operational concerns were addressed through discussion, clarification, and follow-up.</p>	<p>Strategies to avoid duplication of services were discussed through identification of MCP versus BRP/DAC-CDS roles, appropriate service placement, and coordination during transitions of care. Discussions emphasized ensuring members do not receive overlapping services across delivery systems when receiving care through high discussion, clarification, and follow-up.</p>	<p>Collaboration was discussed through joint review of MOU requirements, identification of appropriate points of contact, and coordination on compliance, quality, and care coordination activities. Meetings served as a forum for information sharing and alignment on CHCS guidance and communication obligations.</p>	<p>Member engagement was discussed in a limited manner, primarily in relation to ensuring members are supported during transitions of care and are able to access appropriate services through coordinated referral and outreach processes. Direct member engagement strategies were not a primary focus of the meetings.</p>
San Francisco	307	San Francisco Health Plan	2025	Yes	SMHS/DAC-CDS	<p><b>SF County:</b>                      Alexis Martin, BHS Director of Quality Management                      Alexander Jackson, BHS Adult and Elder Adult Deputy Director                      Anna O'Neil, BHS Director of Education Management                      Chai Valentinou, BHS Director of Data, Analytics, and Evaluation                      Fabiana Fardoush, BHS Children, Youth, and Family Director                      Gloria Frederico, BHS Patient Network Director                      Heather Holsinger, BHS Director of Office of Care and Health Equity                      Inna Morozov, BHS Director of Managed Care                      Inessa Chepur, BHS Director of Central Access and Eligibility                      Janelle Thompson, BHS Director of Justice, Equity, Diversity, and Inclusion / Behavioral Health Services Act Director                      Janelle Thompson, BHS Managed Care Executive Assistant                      Linda Wu, BHS Quality Assurance and Quality Improvement Manager                      Maha Rana, BHS Director of Systems of Care                      Moni Hermal, BHS Managed Care Health Care Analyst                      Nancy Yu, BHS Regulatory Affairs Manager                      Saba Shahid, SFHP Primary Care Behavioral Health Director</p> <p><b>San Francisco Health Plan (SFHP):</b>                      Anna Holsinger, SFHP Care Management Director                      Crystal Garcia, SFHP Compliance and Oversight Director                      Danyelle Chavez, SFHP Care Management                      Eileen Pines, SFHP Health Equity Office                      Grace Caruso, SFHP Governance and Appeals Supervisor                      Jan Mendler, SFHP Quality Data Analytics Director                      Kelly Pines, SFHP Behavioral Health Specialist</p> <p><b>Matilda Care, SFHP Clinical Operations Director (Behavioral Health Management):</b>                      Sean Donnan, SFHP Provider Network Operations Director                      Dawn O'Neil, SFHP Chief Medical Officer                      Torrey Williams, SFHP Behavioral Health Manager                      Yara Gilman, SFHP Quality Improvement Manager</p> <p><b>Carillon:</b>                      Mandeeh (Mandee) Khatib, Carillon Behavioral Health Director                      Sherry Costello, Carillon Behavioral Health BRP</p> <p><b>Quarterly meeting dates:</b>                      January 23, 2023 - Q1 2023 Quarters SFHP/SF County meeting                      April 13, 2023 - Q2 2023 Quarters SFHP/SF County meeting                      July 31, 2023 - Q3 2023 Quarters SFHP/SF County meeting                      October 11, 2023 - Q4 2023 Quarters SFHP/SF County meeting</p>	<p>Core coordination was discussed across the 2023 SFHP-SF BRP quarterly meetings, primarily in relation to coordination between SFHP, SF BRP, and delegated entities during transitions of care, treatment discharge plans, and ongoing service delivery. Discussions focused on information exchange, alignment with CHCS guidance, and coordination responsibilities under the MOU.</p>	<p>Referral processes were discussed in connection with screening, assessment, and transition of care requirements, including referral pathways between SFHP, SF BRP, and delegated entities. Meetings included review of referral tracking, outcomes reporting, and challenges and strengths related to member outreach and follow-up.</p>	<p>Formal dispute resolution was not a primary topic of discussion during the 2023 SFHP-SF BRP quarterly meetings. No disputes requiring escalation under the MOU dispute resolution provisions were identified. Operational concerns were addressed through discussion, clarification, and follow-up.</p>	<p>Strategies to avoid duplication of services were discussed through identification of roles between SFHP and SF BRP, appropriate placement in non-specialty versus specialty mental health services, and coordination during transitions of care. Discussions emphasized ensuring services are coordinated and non-duplicative consistent with MOU requirements.</p>	<p>Collaboration was a recurring theme, including joint review MOU requirements, coordination on CHCS guidance, quality measures, data sharing, and planning activities such as transitional care initiatives and the 3-year integrated behavioral health service plan. Quarterly meetings served as a forum for ongoing communication and alignment across systems.</p>	<p>Member engagement was discussed primarily in relation to outreach challenges, engagement during transitions of care, and ensuring members are connected to appropriate services.</p>

County Name	Plan Code	MCP Plan Name (Auto Populates)	Reporting Year	Combined MOU Yes or No	MOU Type	Meeting Attendees	Summary of the Annual Review Process	Outcome of the Review Process	MOU Amendment? (attach supporting documents)	Additional Information (Optional)
San Francisco	343	Anthem Blue Cross Partnership Plan	2025	Yes	SMHS/DMC-ODS	<p><b>SF County:</b>  Alicia Martin, BHS Director of Quality Management  Alexander Jackson, BHS Adult and Older Adult Deputy Director  Annie Shui, BHS Director of Utilization Management  Chet Valentino, BHS Director of Data, Analytics, and Evaluation  Heather Weiland, BHS Director of Office of Coordinated Care  Imo Monoh, BHS Director of Managed Care  Ivanna Chavez, BHS Director of Central Access and Eligibility  Jornel Christian Tabayoyong, BHS Managed Care Executive Assistant  Mimi Hsiao, BHS Managed Care Health Care Analyst  Nancy Yu, BHS Regulatory Affairs Manager</p> <p><b>Anthem:</b>  Christina Ford, Anthem Representative  Eric Schweitzer, Anthem Representative  Farjol Rishi, Anthem Behavioral Health Program Manager  Kali Macklin, Anthem Program Manager  Patricia Lacortor, Anthem Behavioral Health Case Manager  Sarah Paulsen, Anthem Behavioral Health Director</p>	<p>Quarterly meetings between San Francisco County Behavioral Health and MCPs serve as the formal forum for reviewing MOU compliance, identifying operational or regulatory changes, and determining whether MOU updates are needed. During these meetings, the parties review care coordination workflows, referral requirements, data sharing, and state guidance. When changes are identified, the need for MOU updates is documented, follow-up discussions are assigned, and draft language is developed outside the quarterly meeting process. Proposed amendments are reviewed by both parties and executed only after required legal and administrative approvals.</p>	<p><b>MHP/DMC-ODS Combo MOU:</b>  Amendment (administrative only (responsible person / effective date clarification))  <b>Data Sharing MOU:</b>  New candidate Data Sharing MOU executed in 2025 governing permissible data exchange for care coordination and health care operations.</p>	<p><b>Anthem BHS MOU Amendment Number One</b>  Effective Date: November 1, 2024  Signed: December 2024</p> <p><b>Anthem-SFPH Data Sharing MOU</b>  Initially executed: March 8, 2021  Second amendment (executed): Jan 7, 2025  Third amendment (executed): Oct 16, 2025</p>	
San Francisco	372	Kaiser Permanente	2025	Yes	SMHS/DMC-ODS	<p><b>SF County:</b>  Alicia Martin, BHS Director of Quality Management and Regulatory Affairs  Annie Shui, BHS Director of Utilization Management  Chet Valentino, BHS Director of Data, Analytics, and Evaluation  Heather Weiland, BHS Director of Office of Coordinated Care  Imo Monoh, BHS Director of Managed Care  Ivanna Chavez, BHS Director of Central Access and Eligibility  Jornel Tabayoyong, BHS Managed Care Executive Assistant  Nancy Yu, BHS Regulatory Affairs Manager</p> <p><b>Kaiser:</b>  Aricka O'Hara, Kaiser San Francisco County Behavioral Health Liaison and Clinical Consultant  Candice Mc Cooley, Kaiser Med/Cal Local Engagement Lead – San Francisco County  Charlotte Carrasco, Kaiser San Francisco County Behavioral Health Liaison  Christina Seckley, Kaiser Behavioral Health Consultant  Dustin Nides, Kaiser Behavioral Health Program Manager  Jessica Castaneda Hernandez, Kaiser NCAI Quality Improvement Team  Leah Williams, Kaiser Consultant, Behavioral Health Program – Care Coordination  Lesly Adair, Kaiser MHP/DMC-ODS Contract Manager  Liz Aron, Kaiser Behavioral Health Consultant  Timothy J. Perkins, Kaiser Northern California Med/Cal Director  Victoria Navarro-Gutierrez, Kaiser MOU Coordinator – San Francisco County</p>	<p>Quarterly meetings between San Francisco County Behavioral Health and MCPs serve as the formal forum for reviewing MOU compliance, identifying operational or regulatory changes, and determining whether MOU updates are needed. During these meetings, the parties review care coordination workflows, referral requirements, data sharing, and state guidance. When changes are identified, the need for MOU updates is documented, follow-up discussions are assigned, and draft language is developed outside the quarterly meeting process. Proposed amendments are reviewed by both parties and executed only after required legal and administrative approvals.</p>	<p><b>MHP/DMC-ODS Combo MOU:</b>  Amendment (administrative only (responsible person title))  <b>Data Sharing MOU:</b>  Substantively amended in 2025. Second Amendment added UM and HEDIS data sharing. Third Amendment expanded scope to payments and health care operations.</p>	<p><b>Kaiser BHS MOU Amendment Number One</b>  Effective Date: December 1, 2024  Signed: October 14, 2024</p> <p><b>Kaiser-SFPH Data Sharing MOU</b>  Initially executed: October 1, 2025</p>	
San Francisco	307	San Francisco Health Plan	2025	Yes	SMHS/DMC-ODS	<p><b>SF County:</b>  Alicia Martin, BHS Director of Quality Management  Alexander Jackson, BHS Adult and Older Adult Deputy Director  Annie Shui, BHS Director of Utilization Management  Chet Valentino, BHS Director of Data, Analytics, and Evaluation  Farahmad Farahmand, BHS Children, Youth, and Families Director  Gloria Frederico, BHS Patient Provider Network Director  Heather Weiland, BHS Director of Office of Coordinated Care  Imo Monoh, BHS Director of Managed Care  Ivanna Chavez, BHS Director of Central Access and Eligibility  Jessica Brown, BHS Office of Justice, Equity, Diversity, and Inclusion / Behavioral Health Services Act Director  Jornel Tabayoyong, BHS Managed Care Executive Assistant  Linda Wu, BHS Quality Assurance and Quality Improvement Manager  Max Rocha, BHS Director of Systems of Care  Mimi Hsiao, BHS Managed Care Health Care Analyst  Nancy Yu, BHS Regulatory Affairs Manager  Saba Shahid, OPH Primary Care Behavioral Health Director</p> <p><b>San Francisco Health Plan (SFPH):</b>  Amyl Ratiloo, SFPH Case Management Director  Crystal Garcia, SFPH Compliance and Oversight Director  Dayana Chavez, SFPH Care Management  Edwin Foon, SFPH Chief Health Equity Officer  Grace Carino, SFPH Grievances and Appeals Supervisor  Jose Mendez, SFPH Quality Data Analytics Director  Kathy Pham, SFPH Behavioral Health Specialist  Matilja Cale, SFPH Clinical Operations Director (Utilization Management)</p>	<p>Quarterly meetings between San Francisco County Behavioral Health and MCPs serve as the formal forum for reviewing MOU compliance, identifying operational or regulatory changes, and determining whether MOU updates are needed. During these meetings, the parties review care coordination workflows, referral requirements, data sharing, and state guidance. When changes are identified, the need for MOU updates is documented, follow-up discussions are assigned, and draft language is developed outside the quarterly meeting process. Proposed amendments are reviewed by both parties and executed only after required legal and administrative approvals.</p>	<p>An amendment was executed in February 2025 with updates related to Utilization Management and Medical Necessity criteria to comply with SB 885 and DMHC AP# 24-007.</p>	<p><b>SFPH / Community Behavioral Health Services Agreement – Amendment Number 16 (SB 885 / DMHC AP# 24-007)</b>  Effective Date: July 26, 2024  Signed: February 20-21, 2025</p>	<p>Sean Dongue, SFPH Provider Network Operations Director  Steve O'Neil, SFPH Chief Medical Officer  Tommy Williams, SFPH Behavioral Health Manager  Ives Gibbons, SFPH Quality Improvement Manager</p> <p>Caroleen:  Mandeep (Mandy) Kullar, Caroleen Behavioral Health Director  Sherry Goeland, Caroleen Behavioral Health MVP</p>

# MOU Annual Reporting Attestation

## Attestation for MOU Annual Reporting and Quarterly Reporting

I hereby attest, the applicable executed MOU(s) were posted on the County website within 30 calendar days of being fully executed.

Not applicable. San Francisco County has fully executed MOU(s) with all three SF County MCPs. However, we do not have these MOU(s) posted on the County website. Materials posted to website on 3/12/26.

I hereby attest, an Annual Review of the MOU(s) has been conducted for the **2025** year and all information provided in this report is true, accurate, and complete to the best of my knowledge.

I hereby attest, **San Francisco** County held **11** quarterly meetings with the MCPs, and the quarterly meetings are posted on **San Francisco** County's website.

Partially applicable. San Francisco County held 3 quarterly meetings with Kaiser MCP in 2025 and 4 quarterly meetings with SFHP and Anthem MCPs in 2025. The quarterly meetings were not posted on the County website. Materials posted to website on 3/12/26

I hereby attest, **San Francisco** County will post the Annual Report on the County website within 30 calendar days from the due date of the annual report submission to the Department of Health Care Services.

**On behalf of San Francisco County, I hereby attest, the Annual MOU Review of the 2025 year is true, accurate, and complete to the best of my knowledge.**

Name of Signee	Title	Date	Email Address
Imo Momoh	BHS Director of Managed Care	2/12/2026	<a href="mailto:imo.momoh@sfdph.org">imo.momoh@sfdph.org</a>