
A close-up photograph of a woman with dark, curly hair, smiling warmly. She is wearing a dark denim jacket over a striped shirt. The background is blurred, showing what appears to be an office or clinical setting with blue and white elements.

UNDERSTANDING
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ONBOARDING FORMS

UNDERSTANDING CARELON ONBOARDING FORMS

As part of the Children and Youth Behavioral Health Initiative (CYBHI), Local Education Agencies (LEAs) and Community Based Organizations (CBO) partnering with Carelon Behavioral Health are asked to complete a few key onboarding documents. Each serves a specific function to support secure data sharing, provider setup, and access to reimbursement. Below is a brief overview of the forms and what they're used for.

1. WHAT IS A DUA (DATA USE AGREEMENT)?

A DUA is a legal agreement that outlines how data will be securely shared between the LEA/CBO and Carelon. It ensures both parties follow all state and federal privacy regulations, such as HIPAA and FERPA.

Why is it important?

- Authorizes the exchange of sensitive data
- Defines how data can be used, stored, and protected
- Enables Carelon to process Medi-Cal claims and reporting tied to student services

Who completes it?

Usually, a district leader or designee with authority to sign data-sharing agreements (such as a Director, Assistant Superintendent, or legal representative).

2. WHAT IS A PPA (PROVIDER PARTICIPATION AGREEMENT)?

The PPA is an agreement between your LEA (or fiscal partner) and Carelon that outlines the responsibilities and expectations of participating in the CYBHI reimbursement program..

Why is it important?

- Required to become an approved and participating provider
- Includes expectations for service delivery, documentation, and billing
- Authorizes the provider entity to submit claims for eligible mental health services

Who completes it?

Usually signed by a lead fiscal agent or entity billing through Carelon (e.g., an LEA, nonprofit, or third-party provider).

3. WHAT IS AN SPI ROSTER (STUDENT PERSONAL IDENTIFIER ROSTER)?

The SPI Roster is a secure list of students with active Medi-Cal coverage who are eligible for services. It includes the Student Personal Identifier (SSID or SPI) used for matching claims data with the student's Medi-Cal record.

Why is it important?

- Verifies that the students you serve are eligible for Medi-Cal
- Required to match service records to claims and ensure reimbursement accuracy
- Helps Carelon set up your “eligible population” list for billing

Who completes it?

Typically, your district's Student Information Systems (SIS) or data team, working in partnership with TadHealth.

4. WHAT IS A STUDENT BATCH?

A Student Batch is the ongoing submission of student-level service data sent to Carelon for claims processing. It includes details such as the service type, provider, date of service, and SPI.

Why is it important?

- It's how LEAs report CYBHI-eligible services for reimbursement
- Must align with approved service codes and provider types
- Submitted regularly (monthly or quarterly, depending on your setup)

Who submits it?

Usually TadHealth, your billing partner, or a designated person in the district who handles data reporting.

NEED HELP?

TadHealth is here to support you every step of the way. If you have questions about any of these forms or are unsure who should complete them, please reach out to your TadHealth contact.