Sonoma County Behavioral Health
Program Manager Change of Provider (COP) Workflow

Manager Reviews and immediately sends the COP to QA SOA via DHS-BH-QA-ChangeProvider@sonomacounty.gov

COP requests must be resolved within 10 business days

If COP request is received by program staff or Manager directly from the client in person, or over the phone, if appropriate, address and resolve COP request with the client at the time of the request.

Manager assesses whether the request is arising due to discriminating against or harassing the provider based on the provider's race, ancestry, place of origin, color, ethnic origin, citizenship, creed, sex, sexual orientation, age, record of offenses, marital status, family status or disability.

NO

Manager assesses if fulfilling the request is operationally feasible to a reasonable degree, e.g., are staffing levels sufficient to grant the request without negatively affecting the care of other clients? Also consider the client's needs, the impacted provider's recommendation, frequency or repeated requests from client, case load of the provider being requested, needs of the clinic providing the service. *Should involve meeting with impacted provider(s).

NO

Deny request, verbally notify client, cite rationale for denial, send completed COP to QA SOA via email

YES

Grant request, document discussions, verbally notify client of the new provider and appointment date. Send Completed COP to QA SOA via email above.

YES

Manager advises patient that DHS-BHD prohibits discrimination and harassment against staff. Manager advises client that fulfilling their request could deny staff of equal treatment in their employment by requiring staff to collude in behavior prohibited by California's Fair Employment and Housing Act.

Manager communicates to both client and provider:
1. All staff members are fully capable and qualified to deliver excellent care.
2. Fulfilling the client's request may demonstrate a lack of solidarity to providers, harming relationships important to the delivery of care.

Does the client maintain their request?

NO

Ensure above discussions are documented

YES

Manager assesses if fulfilling the request is operationally feasible to a reasonable degree

NO

Manager meets with client to explain that it is not operationally feasible to respond to their request, reaffirms points in the earlier discussion and explores other options.

Ensure above discussions are documented

YES

Manager has discussion with affected provider that:
A. Reaffirms their commitment to Equal Employment Opportunity Policy policies and the California's Fair Employment and Housing Act, as well as their support of the staff member in general.
B. Allows provider to choose whether to continue providing services to the client, without threat of retaliation for either decision.

Does the provider wish to excuse themselves?

NO

Manager (accompanied by affected provider if they are comfortable with attending) communicates to the client the reasons the manager supports the staff member's decision, including their commitment to Sonoma County's Employment Opportunity Policy and California's Fair Employment and Housing Act, as well as their support of the staff member in general.

Manager (with support from Cultural Responsiveness Coordinator, Section manager, Division Director, or others as needed) discusses with client (and client' family, if relevant) how they can work together within the circumstances, as well as expectations for non-discriminatory and non-harassing behavior.

YES

Manager ensures that the affected provider is provided sufficient support.

Manager meets with client and communicates change in provider.

Manager communicates reason for change in provider with unit staff, QA SOA and sends updated form via email above.

Ensure above discussions are documented