

Category:	<u>Subject:</u> FCNi TBS & IHBS Referral Process
Behavioral Health	<u>Scope:</u> SLO Behavioral Health Department – Mental Health Services
	<u>Effective Date:</u> 8/01/2023

Purpose: Referral process between SLO Behavioral Health Department-Mental Health Services & FCNi TBS & IHBS.

Procedure:

1. Therapist/Primary adds the relevant referral information to a targeted case management (TCM) Service Note in SmartCare using the Word doc templates provided for the relevant programs/services.
2. Therapist/Primary adds to the targeted case management (TCM) Service Note in SmartCare a co-signature request for their Program Supervisor, Health Information Technician (HIT), and the associated Family Care Network (FCNi) Program Supervisor.
3. Therapist/Primary sends a SmartCare message to their Program Supervisor and the associated FCNi Program Supervisor noting the referral being made.
4. County Health Information Technician (HIT) opens the referral program in SmartCare, status as "requested" and assigns the appropriate FCNi Program Supervisor as "assigned staff" to that program.
 - a. HIT adds in the "comments" section the date of the Service Note that has the referral information in it.
 - b. Family Care Network (FCNi) Program Supervisor to assign to the requested referral programs as "assigned staff":

TBS/IHBS: Jess Gladwill
 - c. FCNi programs to assign as "requested":

TBS: FCN TBS (3404)
IHBS: FCN ICC/IHBS (3464)
5. County HIT sends a SmartCare message to the associated FSP Program HIT to inform them that the client has been opened to the Referral program as "requested".
6. When client is being placed into the program:
 - a. For TBS and IHBS, the associated FCNi Program Supervisor emails County staff informing client is being placed into the program.
 - b. The FCNi HIT changes the client's program from "requested" to "enrolled".

Templates:

IHBS Template:

MEDI-CAL ELIGIBILITY:

- Youth has full-scope Medi-Cal, verified today (Answer Yes or No):
- Medical was verified by:

BEHAVIORS BEING TARGET (What are the current behaviors/symptoms to be targeted by IHBS and how are they impacting the client's functioning?):

FREQUENCY OF SERVICES

- Estimate the frequency of IHBS services needed per week:
- Estimate the frequency of ICC services needed per month:

Is this a stepdown from TBS? (Answer Yes or No):

Has there been a CFT for this family? (Answer Yes or No):

Does this youth have an open Child Welfare case? (Answer Yes or No):

TBS Template:

MEDI-CAL ELIGIBILITY:

- Youth has full-scope Medi-Cal, verified today (Answer Yes or No):
- Medi-Cal was verified by:
- Out-of-County Authorization Needed? (Answer Yes or No):

TBS CLASS ELIGIBILITY CRITERIA

- ___ Currently place in an STRTP
- ___ Considered for an STRTP
- ___ Emergency MH hospitalization within las 24 months
- ___ At risk of emergency MH hospitalization
- ___ Previously receive TBS

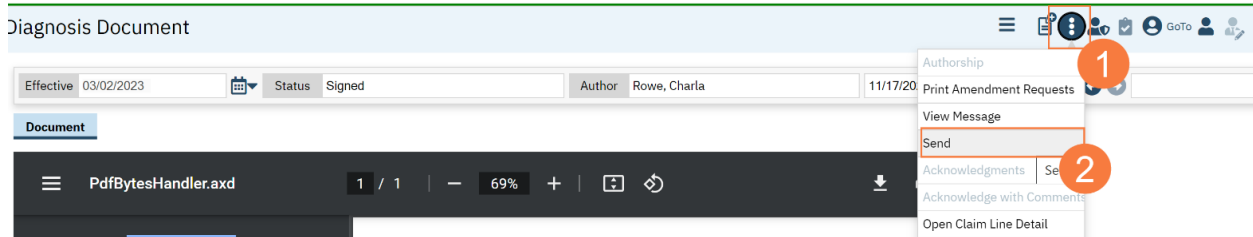
WITHOUT TBS, ONE OR MORE OF THE FOLLOWING IS HIGHLY LIKELY:

- ___ Will require out-of-home placement
- ___ Will need higher level residential care
- ___ Will need acute care (hospital/crisis)
- ___ Unable to transition to lower level of care (ex. from STRTP to resource family home)

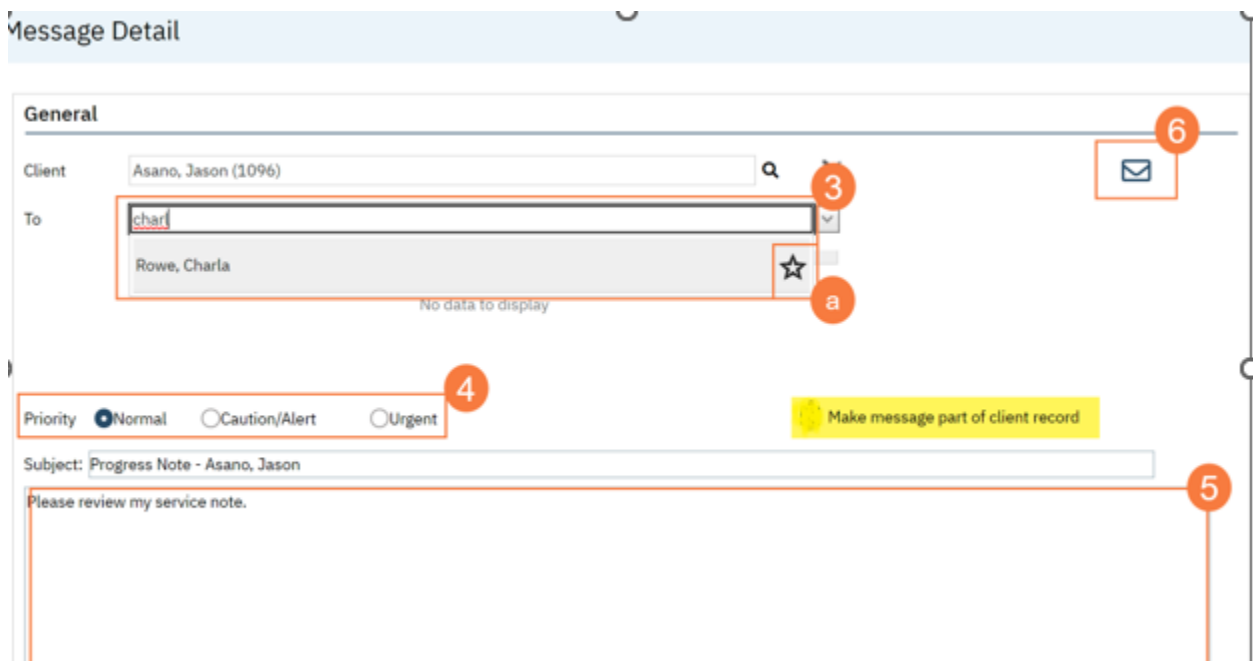
DESCRIBE BEHAVIORS THAT PUT CHILD/YOUTH AT RISK:

How to send the referral service note in a SmartCare message

1. Open the note you want to send. **Click on the three dots icon** in the upper right side.
2. **Click Send** from the menu.

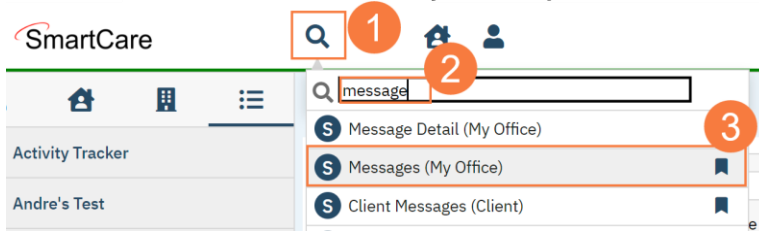


3. **Click in the To box and begin to type the staff member's name.**
 - a. To save this person as a favorite **click the Star icon.**
4. **Click the radial button** to change the priority from Normal if it applies.
5. **Click in the empty box below** and **type the message.**
6. **Click the mail icon** to send the message.
7. **NOTE: DO NOT CHECK THE BOX TO MAKE MESSAGE PART OF THE CLIENT RECORD**

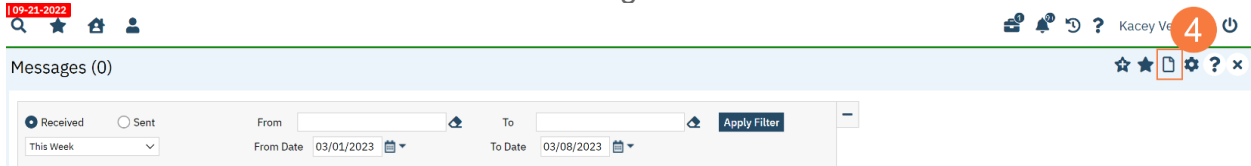


How to send a SmartCare message

1. Click the Search icon.
2. Type Messages in the search bar.
3. Click to select Messages (My Office).



4. Click the New icon to create a new message.



5. Click the Magnifying glass icon next to the Client field and search for the client (if applicable).

The screenshot shows the 'Message Detail' form. The 'General' section is active. The 'Client' field has a magnifying glass icon (5) next to it. The 'To' field is also visible. Below the fields, there is a message 'No data to display'.

6. Enter the search criteria and click the radial button to select the patient.
7. Click Select.

The screenshot shows the 'Client Search' form. The 'Name Search' section is active. The 'Last Name' field contains 'TestA'. The 'First Name' field is empty. The 'Program' dropdown is set to 'Individual'. Below the search fields, there is a table of search results. The first row is highlighted with an orange box and a red circle 6. The table has columns: ID, Master ID, Client Name, Chosen Name, SSN/EIN, DOR, Status, City, and Primary Clinician. The 'Select' button (7) is at the bottom right.

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOR	Status	City	Primary Clinician
1297	1297	TestA, Shawn		2222	05/31/20...	Active	Sacrame...	

8. Click in the To box and begin to type the staff member's name.
 - a. To save this person as a favorite click the Star icon.
9. Click the radio button to change the priority from Normal if it applies.
10. Click in the Subject field and type an appropriate subject.
11. Click in the empty box below and type the message.
12. Click the mail icon to send the message.
13. **NOTE: DO NOT CHECK THE BOX TO MAKE MESSAGE PART OF THE CLIENT RECORD**

Message Detail

General

Client

TestA, Shawn (1297)

8

To

12

X scheduling

9

Priority

☒ Normal ☐ Caution/Alert ☐ Urgent

10

Subject

Pt needs to reschedule appt

11

Hello,

The client called and is unable to make his appt tomorrow, can you please call and get him rescheduled.

Make message part of client record

Revision History

Date:	Section Revised:	Details of Revision:
8-01-23	Original	