

<b>Category:</b>	<b><u>Subject:</u></b> TMHA Referral Process
<b>Behavioral Health</b>	<b><u>Scope:</u></b> SLO Behavioral Health Department – Mental Health Services
	<b><u>Effective Date:</u></b> 8/01/2023

**Purpose:** Referral process between SLO Behavioral Health Department-Mental Health Services & TMHA ATP, SEP, Wellness Centers, Housing, Growing Grounds, TARP, Library Outreach & YTP.

**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 Transitions Mental Health Association (TMHA) Program Supervisor.
3. Therapist/Primary sends a SmartCare message to their Program Supervisor and the associated THMA 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 TMHA 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. TMHA Program Supervisors to assign to the requested referral programs as "assigned staff":

**FSP Homeless Outreach Housing, Forensic Re-entry Services; Library Outreach:**

Miriam Vargas

**TMHA ATP:** Tom Quintana

**TMHA SEP:** Starr Cloyd

**THMA Wellness Centers:** Tonya DeRose

**TMHA Housing:** Cody LaMacchia-Meeks

**TMHA Growing Grounds:** Anna Weins

**TMHA INN MHSA TARP:** Trista Ochoa

**TMHA YTP:** Alley Jensen

- c. TMHA Programs to assign as "requested":

**FSP Homeless Outreach Housing:** TMHA MHSA Adult Engagement 3218

**TMHA Forensic Re-entry:** TMHA MHSA Forensic Re-entry 3207

**TMHA Library Outreach:** TMHA MHSA Library Outreach Team 3283

**TMHA ATP:** TMHA ATP 3202

**TMHA SEP:** TMHA Vocational 3205

**THMA Wellness Centers:** TMHA MHSA Adult SC Wellness Ce 3213; TMHA MHSA Adult NC Wellness Ce 3219; TMHA MHSA Adult SLO Wellness Ce 3225

**TMHA Housing:** Community Housing: TMHA Comm Housing – Empleo 3241; Case Management: TMHA Residential CM (CRP) 3240; FSP Adult Housing: TMHA MHSA Adult FSP Res-Empleo 3242; FSP Older Adult Housing: TMHA MHSA Oldr Adlt FSP Rs-Emp 3243; Intensive Residential Housing (non-FSP): TMHA MHSA Adult Int Res & Sv (not FSP)

(CRP); FSP AOT Housing: TMHA MHSA Adlt FSP AOT Housing 3246; Bishop Street Studios: TMHA Adlt Housing Bishop St 3270  
**TMHA Growing Grounds:** TMHA Vocational 3205  
**TMHA INN MHSA TARP:** TMHA MHSA Transition Assist 3247  
**TMHA YTP:** TMHA STRTP Treatment 3235

5. County HIT will add referral information to Excel spreadsheet located at: [THMA - OneDrive \(sharepoint.com\)](#)
6. County Program Supervisor messages in SmartCare the associated TMHA Program Supervisor to inform them that the referral has been completed.
7. When client is being placed into the program:
  - a. The associated TMHA Program Supervisor messages in SmartCare the County staff informing client is being placed into the program.
  - b. The associated HIT or Designee changes the client's program from "requested" to "enrolled".

**Template:**

Referral Date:

Program Initiating Referral:

Program Receiving Referral:

Contact Person at Receiving Program:

Referral discussed with the contact person? ☐ Yes ☐ No

**Reason for Referral** (Describe the reason for the referral and complete the tab fully that matches the referral you are making):

**Comments/Special Considerations** (Describe any additional factors the receiving program should consider, such as current potential for violence or self-injury):

**Transitions Mental Health Association Referral**

Is the client currently homeless? ☐ Yes ☐ No

Is client at risk of homelessness? ☐ Yes ☐ No

Does the client meet MHSA target population criteria? ☐ Yes ☐ No

Service Requested (specify):

☐ Housing ☐ Case Management ☐ Supported Employment ☐ Growing Grounds Farm Wellness Center (specify):

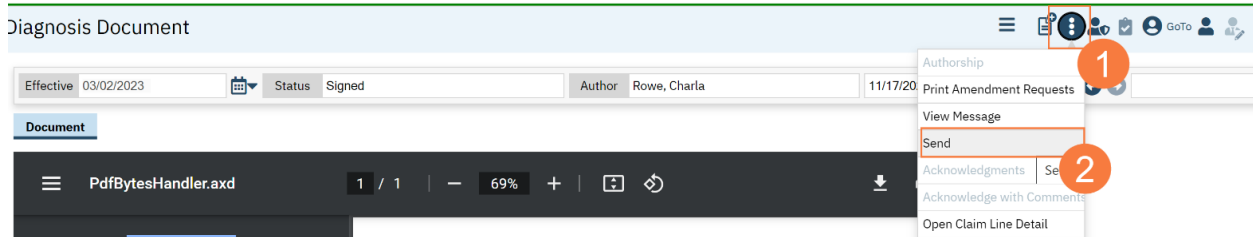
☐ Life House (North County) ☐ Hope House (SLO) ☐ Safe Haven (South County)

☐ Other Specify:

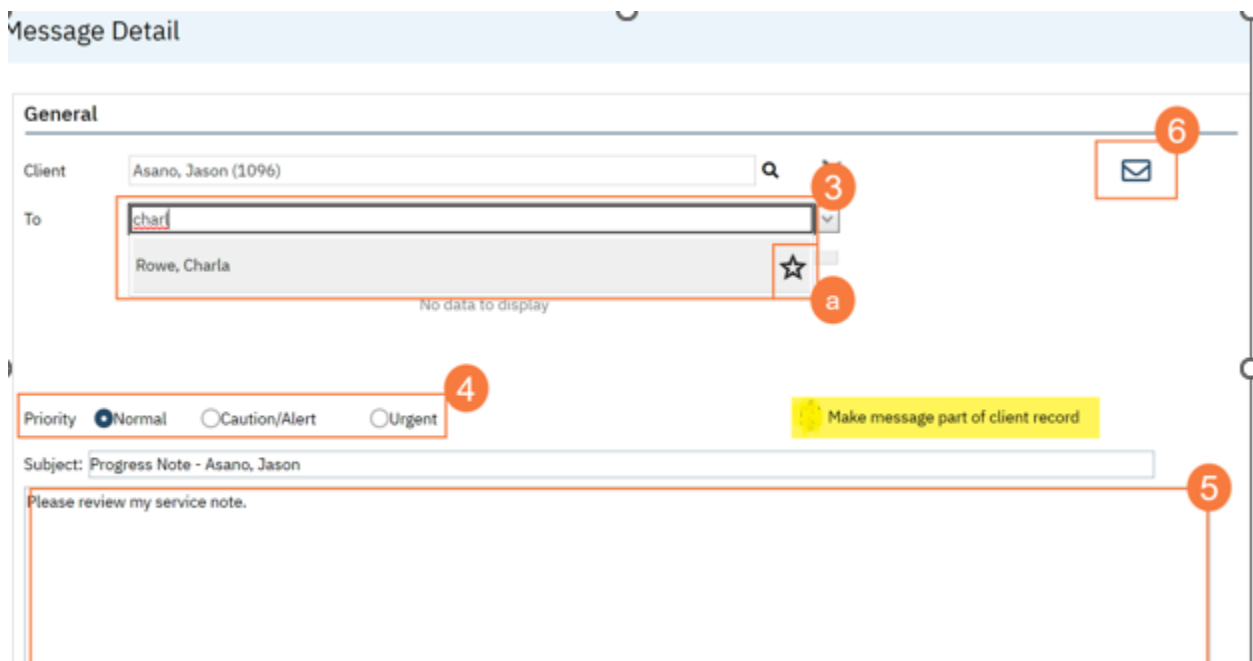
Other Referral: ☐ Yes ☐ No

# 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.

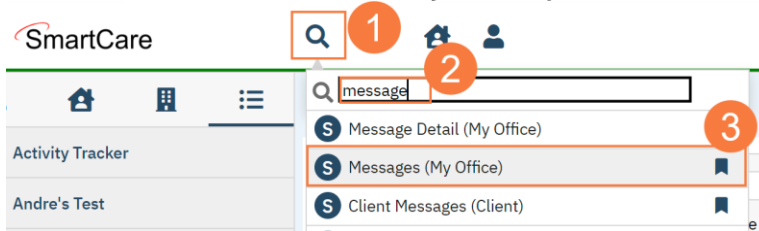


3. **Click in the To box and begin to type the staff member's name.**
  - a. To save this person as a favorite **click the Star icon.**
4. **Click the radial button** to change the priority from Normal if it applies.
5. **Click in the empty box below and type the message.**
6. **Click the mail icon**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

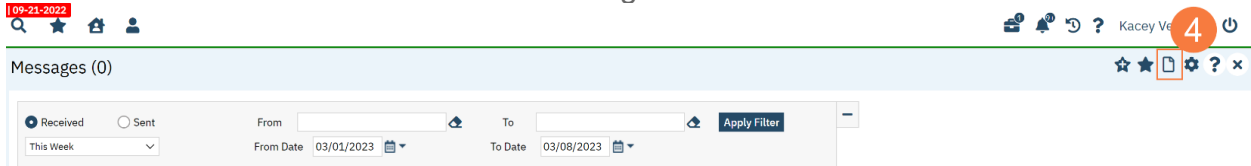


# How to send a SmartCare message

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'. The 'Other Search Strategies' section includes fields for 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', and 'Insured ID Search'. The 'Records Found' section shows a table with one record (6) highlighted. The 'Select' button (7) is at the bottom.

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOR	Status	City	Primary Clin
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

12

To

scheduling

9

10

Priority

Normal

Caution/Alert

Urgent

Make message part of client record

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.

### Revision History

Date:	Section Revised:	Details of Revision:
8-01-2023	Original	