

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:

Referral for TBS or IHBS:

1. Clinician/Primary adds the relevant referral information to a targeted case management (TCM) Service Note in SmartCare using the Key Phrases templates in SmartCare provided for the relevant programs/services.
2. Clinician/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. Clinician/Primary sends a SmartCare message to their Program Supervisor, Health Information Technician (HIT), 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 FCNi 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" and opens appropriate special population.

Step down from TBS to IHBS:

1. If determined during Child Family Team Meeting (CFT) that client should be closed to TBS and transitioned to IHBS the FCNI Social Worker will add to the CFT progress note the following statement from SmartCare Key Phrases, adding information about completed TBS goals and planned IHBS goals.
 - a. "The team agrees that the client has successfully met their TBS goals of ...(insert TBS goals). The team also agrees that the client would benefit from ongoing IHBS at this time in order to ... (insert goals/focus for IHBS). As a result, TBS will be closed, and the team will begin providing IHBS contacts 2x/week."
 - b. FCNI Social Worker will assign CFT Progress Note to IHBS Program Supervisor, FCNI HIT, Clinic Program Supervisor, Clinician/Primary staff and Clinic HIT.
2. FCNI HIT will open IHBS program to date of CFT Progress Note.
 - a. FCNI HIT will audit TBS program and when all documentation complete, close program.

Templates (In SmartCare Key Phrases):

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:

Have IHBS services and the reason for the referral been reviewed with the youth/family?
(Answer yes or No):

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):

Will a bilingual staff be needed? (Answer Yes or No):

Is the youth currently receiving therapy services? (Answer Yes or No and include additional comments as needed):

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:

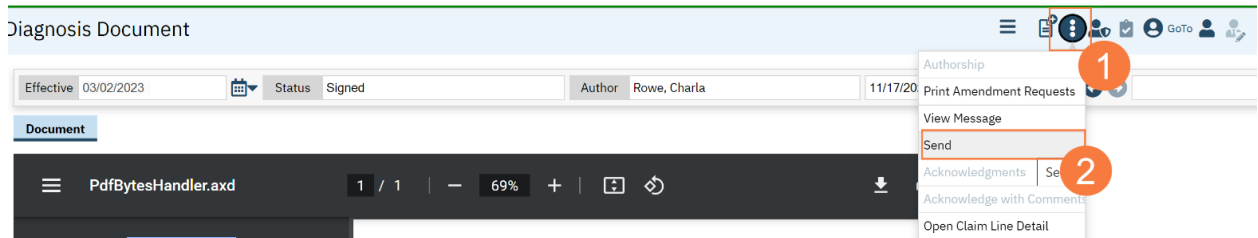
FREQUENCY OF SERVICES

- Estimate the frequency of TBS services needed per week:
- Have TBS services and the reason for the referral been reviewed with the youth/family? (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):
- Will a bilingual staff be needed? (Answer Yes or No):
- Is the youth currently receiving therapy services? (Answer Yes or No and include additional comments as needed):

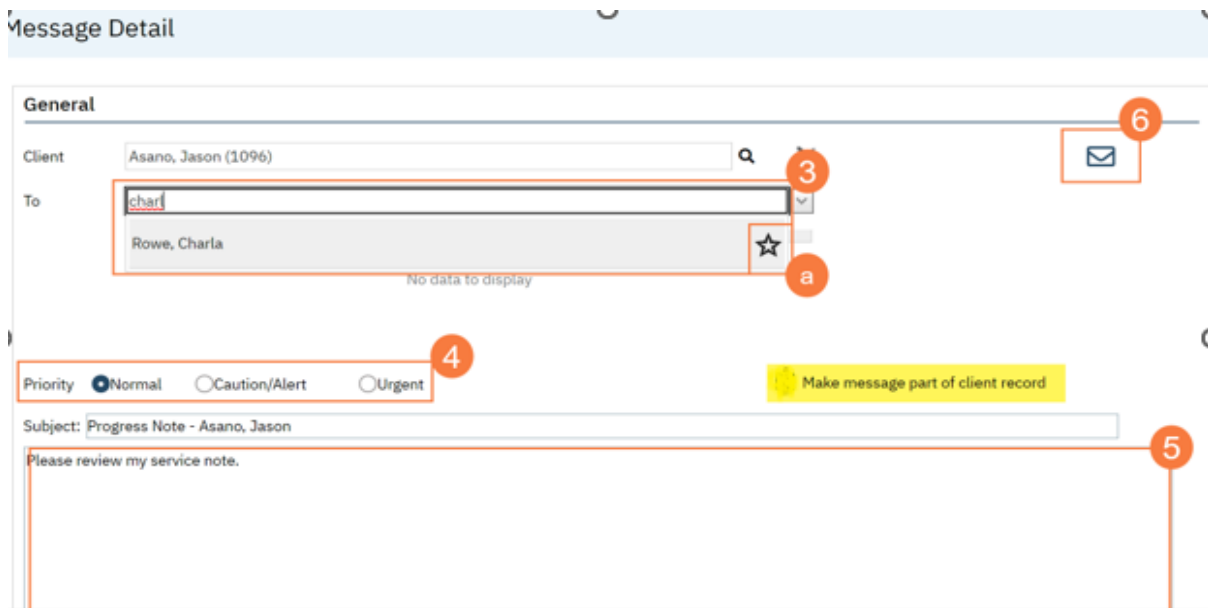
For Clinician/Primary:

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.



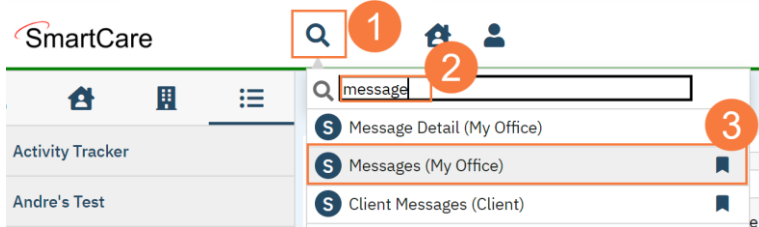
3. **Click in the To box and begin to type the staff member's name.**
 - a. To save this person as a favorite **click the Star icon.**
4. **Click the radial button** to change the priority from Normal if it applies.
5. **Click in the empty box below and type the message.**
6. **Click the mail icon**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



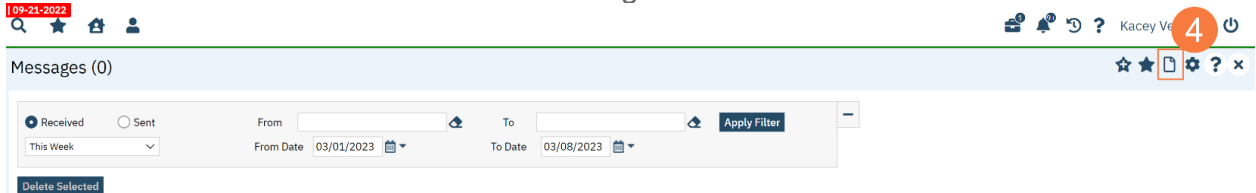
For HIT:

How to send a SmartCare message

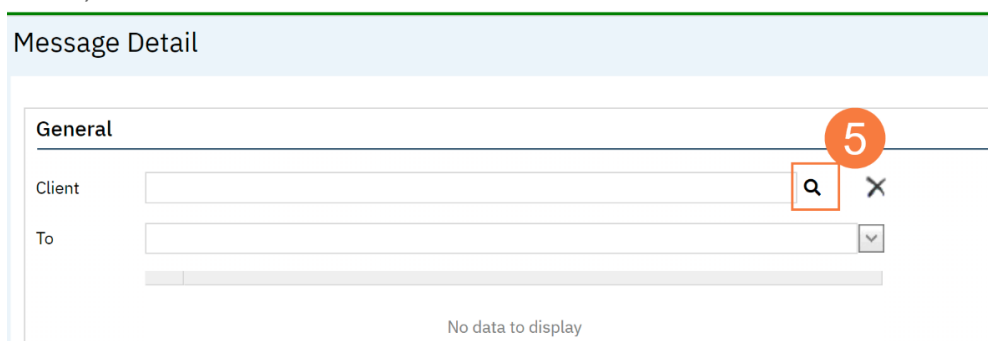
1. Click the Search icon.
2. Type Messages in the search bar.
3. Click to select Messages (My Office).



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).



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

7. Click Select.

The screenshot shows the 'Client Search' window. At the top, there's a 'Clear' button and a header bar. Below, the 'Name Search' section includes checkboxes for 'Include Client Contacts' and 'Only Include Active Clients'. There are tabs for 'Broad Search' and 'Narrow Search', and a 'Type of Client' section with radio buttons for 'Individual' (selected) and 'Organization'. Search fields for 'Last Name' (containing 'TestA'), 'First Name', and 'Program' are present. The 'Other Search Strategies' section contains various search buttons like 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', 'Authorization ID / #', and 'Insured ID Search'. Below this is a 'Records Found' table with columns: ID, Master ID, Client Name, Chosen Name, SSN/EIN, DOB, Status, City, and Primary Clinician. One record is listed with ID 1297. A red box labeled '6' highlights the 'Primary Clinician' column header. At the bottom, a 'Select' button is highlighted with a red box labeled '7', next to a 'Cancel' button.

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

The screenshot shows the 'Message Detail' window. The 'General' tab is active. The 'Client' field shows 'TestA, Shawn (1297)'. The 'To' field is empty and highlighted with a red box labeled '8'. Below it, a 'scheduling' tag is visible. The 'Priority' section has radio buttons for 'Normal' (selected), 'Caution/Alert', and 'Urgent', with a red box labeled '9' around them. A red button labeled 'Make message part of client record' is to the right. The 'Subject' field contains 'Pt needs to reschedule appt' and is highlighted with a red box labeled '10'. Below the subject is a large text area for the message body, which contains the text 'Hello, The client called and is unable to make his appt tomorrow, can you please call and get him rescheduled.' and is highlighted with a red box labeled '11'. In the top right corner, a mail icon is highlighted with a red box labeled '12'.

Revision History

Date:	Section Revised:	Details of Revision:
8-01-23	Original	
10-11-23	Procedure, Message	Add HIT to 3, correction to 5, special population instruction to 6, clarify message instructions
7-5-24	Templates	Update IHBS and TBS Templates with additional questions
9-16-24	Procedure and Templates	Add section on transition from TBS to IHBS, Note that templates are now in Key Phrases