Category:	Subject: TMHA Referral-Bridge Housing (ATP II and Hathaway)
Behavioral Health	Scope: SLO Behavioral Health Department – Mental Health Services
	Effective Date: 10/01/2024

Purpose: Referral process between SLO Behavioral Health Department and Transitional Mental Health Association (TMHA) Programs: Bridge Housing which includes Behavioral Health Bridge Housing Adult Transitional Program II (ATP II BHBH) and Behavioral Health Bridge Housing Hathaway Rental Assistance.

Procedure:

1. Primary staff adds the relevant referral information to a targeted case management (TCM) Service Note in SmartCare using Key Phrases templates (see appendix for how to) in SmartCare for the relevant programs/services.
    a. If the client being referred is open to SUD a Coordinated Care Consent must be signed prior to submitting the referral.
    b. If there are questions about the appropriateness of the referral based on referral questions, contact the Justice Services Division (JSD) for questions, Kat Leonard or Josh Woodbury.

2. Primary staff adds to the targeted case management (TCM) Service Note in SmartCare the co-signature request for their Program Supervisor, Kat Leonard or JSD Designee and site Health Information Technician (HIT).
    a. Add appropriate TMHA Program Manager(s) to Referral Note as co-signer.
        i. **Bridge Housing ATP II**: Tom Quintana
        ii. **Bridge Housing Hathaway Rental Assistance**: Mark Lamore & Tony Arnold

3. Clinic/Program HIT will:
    a. Open as requested to JSD Program MH in requested status and assign Kat Leonard or JSD Designee.
    b. Pull forward Diagnosis from referring Mental Health program to JSD Program MH (assign to JSD Program Supervisor for co-signature).

    c. Open as requested the TMHA program being requested.
        i. **TMHA Bridge Housing ATP II**: TMHA ATP II - BHBH Pismo St. House
        ii. **TMHA Bridge Housing Hathaway Rental Assistance**: TMHA Bridge Housing Hathaway Rental Assistance
    d. Pull forward Diagnosis from referring Mental Health Program to TMHA program (add TMHA, Megan Boaz-Alvarez for co-signature).

4. Primary staff will send a SmartCare message (see appendix for how to) to Josh Woodbury, Kat Leonard, Allyson Woolley, TMHA staff and clinic Health Information Technician (HIT) noting the referral being made.
    a. If referral is for ATP II BHBH, the Primary staff will have client complete the TMHA Application to Adult Transitional Programs.

b. Once complete, Primary staff will give the application to clinic/program HIT to scan in and attach to referral in SmartCare.

5. After the referral is reviewed and approved, Kat Leonard or Designee and TMHA Program Managers (s) will document in their respective program the decision to move forward in referral process or deny.
   a. If approved sign referral and assign the JSD HIT to the referral.
   b. If denied sign referral and notify referring party and clinic/program HIT.
      i. Clinic HIT would ensure a NOABD Denial has been completed and signed by clinic Program Supervisor.
      ii. Clinic HIT would close the requested program if referral denied.

6. When client is being placed into the program:

   a. The associated TMHA Program Supervisor adds progress notes regarding referral reviews with collaboration with county representative of acceptance or denial and sends using SmartCare messages to the County staff and JSD HIT informing client is being placed into the program.

   b. The JSD HIT reviews/updates programs and adds TMHA Treatment Team.
      i. For Program-TMHA ATP II BHBH, clients will be enrolled in the program when admitted on the bed board. JSD HIT should verify that programs are correct. Add TMHA Treatment Team members.
      ii. For Hathaway Rental Assistance, change client's program to "enrolled" as of date of acceptance progress note. Add TMHA Treatment Team members.
      iii. For both ATP II BHBH and Hathaway Rental Assistance open the Special Population **Bridge Housing** as of the program enrollment date.
      iv. Change JSD Program MH from requested to enrolled.

7. ATP II BHBH, TMHA Program manager will document a 30-Day Review TCM Progress note in SmartCare using key phrasing template.

8. When services are ending with TMHA program, ensure that closing or discharge steps are followed.
   a. If the client is ending all services, a Discharge Summary is done by JSD Bridge Housing. Ensure all documentation has been completed by both TMHA and JSD Bridge Housing team.
   b. If the client is continuing services with other programs, JSD Bridge Housing team will complete a transfer summary assigning Program Supervisor and JSD HIT.
9. JSD HIT will audit charts ensuring all documentation complete and close programs and update treatment team as appropriate per Discharge or Transfer audit tool.

Appendix

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.
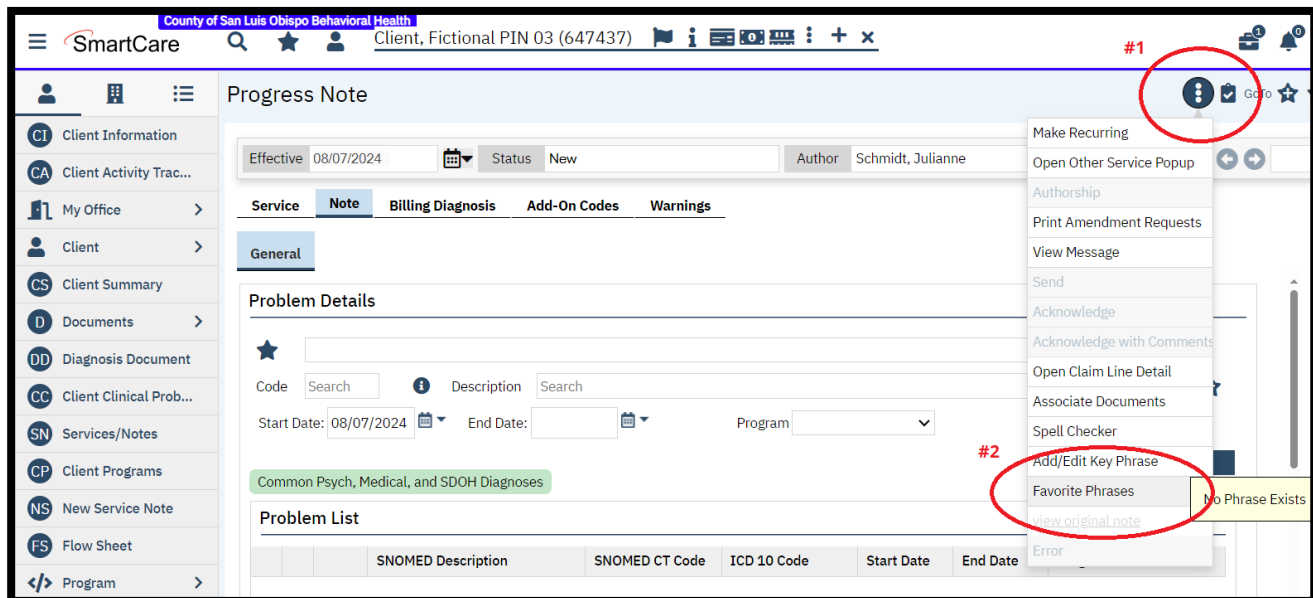2. **Click Send** from the menu.
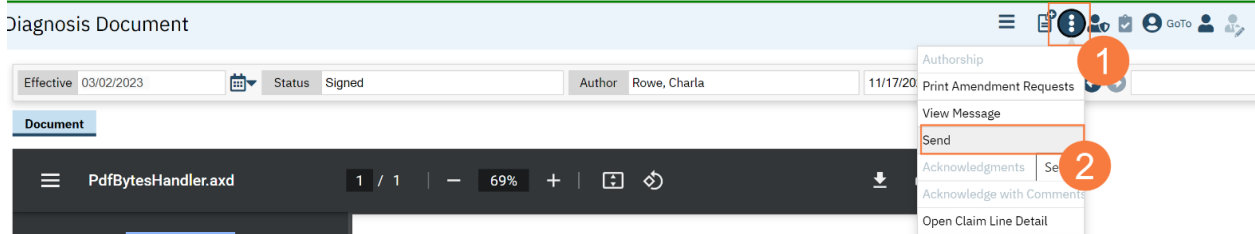
3. **Click in the To-box and begin to type the staff member's name.**
   a. To save this person as a favorite **click on the Star icon**.
4. **Click the radial button** to change the priority from Normal if it applies**.**

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 UNLESS MESSAGE CONTAINS NECESSARY COORDINATION INFORMATION**

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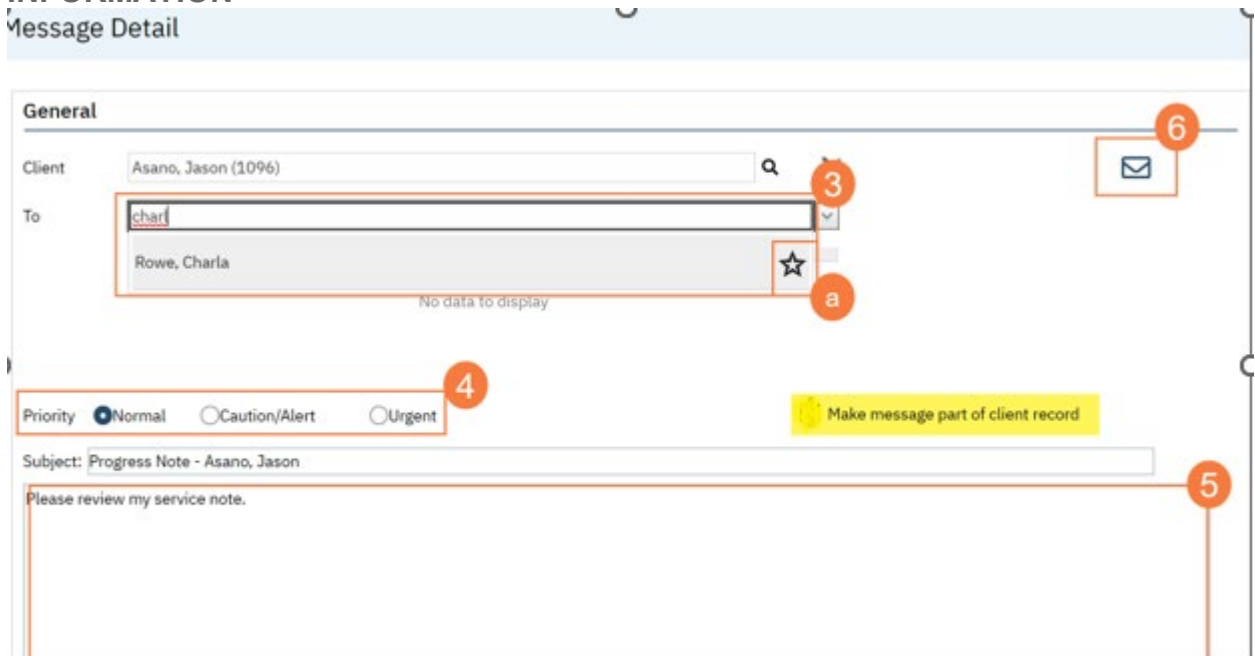
How to Use Key Phrases in SmartCare

- Key Phrases is what template text is called in SmartCare.
- Directions:
  - Open Client Chart
  - Start a new version of the documentation you are entering, whether that be a service note, an assessment, or a discharge summary.
  - Select the three dots icon (#1 below), and then select "Favorite Phrases" (#2 below). A new menu will open on the left side of your screen called "Use Key Phrases."
  - Select "Agency" (#3 next page), and then select the category of the key phrases you would like to view/use (#4 next page) from the "County Key Phrases" choices available.
  - Key Phrases have been developed that are Mental Health treatment specific (denoted by "MH" in the title) and substance use disorder treatment specific (denoted by "SUD" in the title).

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- Each Key Phrase available displays in a separate box (see arrows below). Each box has been titled to indicate what the template text is intended for.
- Put your cursor where you want the key phrase/template text to go. Then click the "use" link. The text will populate in the location you have chosen with your cursor.

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Revision History

Date:	Section Revised:	Details of Revision:
10-1-24	New	
10-16-24	Update	Add Key phrases, update programs and contact information. Update procedure.
12-11-24	Update	Add JSD Supervisor, update appendix for SmartCare message instructions
1-2-25	Update	Add Bridge Housing Special Population to step 7
1-8-25	Update	Added some clarifying language, added pull of Diagnosis document
2-18-25	Update	Modify for simultaneous approval by JSD and TMHA.
4-18-25	Update	Update staff at Hathaway