

Category:	Subject: FCNI Katie A Intensive Referral Process
Behavioral Health	Scope: SLO Behavioral Health Department – Mental Health Services
	Effective Date: 7/23/2025

Purpose: Referral process between SLO Behavioral Health Department-Mental Health Services & FCNI for Katie A Intensive services.

Procedure:

Referrals may be made after an assessment or during the course of treatment when Katie A Intensive services are indicated.

Referral to Katie A Intensive:

1. Primary staff adds the relevant referral information to a targeted case management (TCM) Service Note in SmartCare using the Key Phrases templates in SmartCare for Katie A Intensive Services. (Katie A Key Phrase Template in Appendix)
2. Primary Staff 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 Family Care Network (FCNI) Program Supervisor.
3. Primary staff sends a SmartCare message to their Program Supervisor, Health Information Technician (HIT), and the 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. Verify that **Katie A – ICC/IHBS** special population is open.
 - c. Family Care Network (FCNI) Program Supervisor to be assigned to the requested referral program as "assigned staff":
 - d. FCNi program and Supervisor to assign as "requested":

FCN MHS (3466): Dylan Hunt

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. The FCNI Program Supervisor emails County staff informing them that the client is being placed into the program and that case can be transferred.
 - i. If the client receiving Medication Support at the county clinic, that service will remain at the county clinic. Katie A Intensive would become the primary program.

- b. The FCNI HIT changes the client's program from "requested" to "enrolled" and opens the special populations, **FCN Katie A Tracking** and **ICC/IHBS**.
 - i. Verify that **Katie A – ICC/IHBS** special population is also open.
- 7. Primary staff will enter Transfer Summary progress note, assigning Program Supervisor, clinic HIT, FCNI Program Supervisor and FCNI HIT.
 - a. Clinic HIT will verify all required staff have signed or been assigned to transfer, process the transfer, update flags, update treatment team, and close clinic program (if med support not remaining).
 - b. FCNI HIT will check flags and assign Treatment Team.

Appendix

Key Phrase:

Katie A. Intensive Referral Progress Note Template

Katie A. Subclass Eligibility Verification

Check all that apply:

- Client has full-scope Medi-Cal Client is under 21 years of age
- Client is involved with the child welfare system, including one of the following (check all that apply):
 - Court-dependent (300 dependent)
 - Non-minor dependent (AB 12)
 - Voluntary family maintenance

Current Placement Type (e.g., home, STRTP, foster home, relative placement):

- Client meets subclass criteria as determined by (check all that apply):
- CFT meeting indicating need for Katie A. intensive services (Date: _____)
- Client has high-intensity behavioral health needs
- Client is at risk of placement disruption and/or placement in institutional care due to behavioral health needs
- Client has had 3 or more placement changes in 24 months due to behavioral health needs
- Client would benefit from community-based services

Have other intensive services/programs already been considered or attempted (e.g. Therapeutic Foster Care, Wraparound, TBS, IHBS, FSP)? (Answer Yes or No and provide explanation as needed):

Reason for Referral

Briefly describe the reason for referral, including presenting problems, symptoms, and/or recent events leading to the need for Katie A. intensive services:

Safety/Risk Factors

Check all that apply and provide a brief description:

- History of psychiatric hospitalization:
- Recent suicidal ideation or attempts:
- Aggression or violence toward others:
- Recent self-injurious behavior:
- Substance use concerns:
- CSEC involvement:
- History of AWOL/runaway behavior:
- Other:

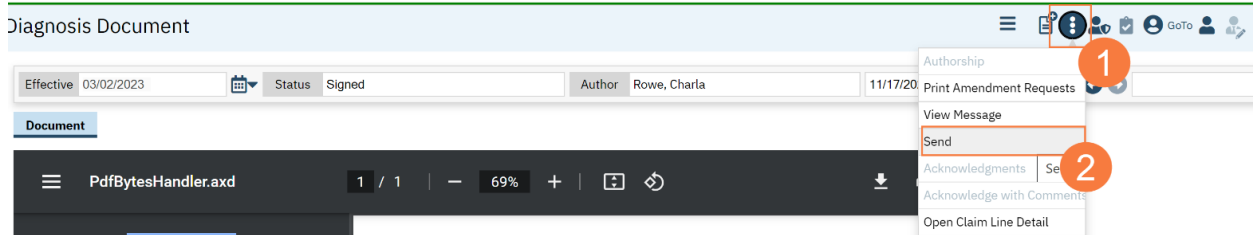
Additional Comments/Special Considerations (Describe any additional factors the receiving program should consider):

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

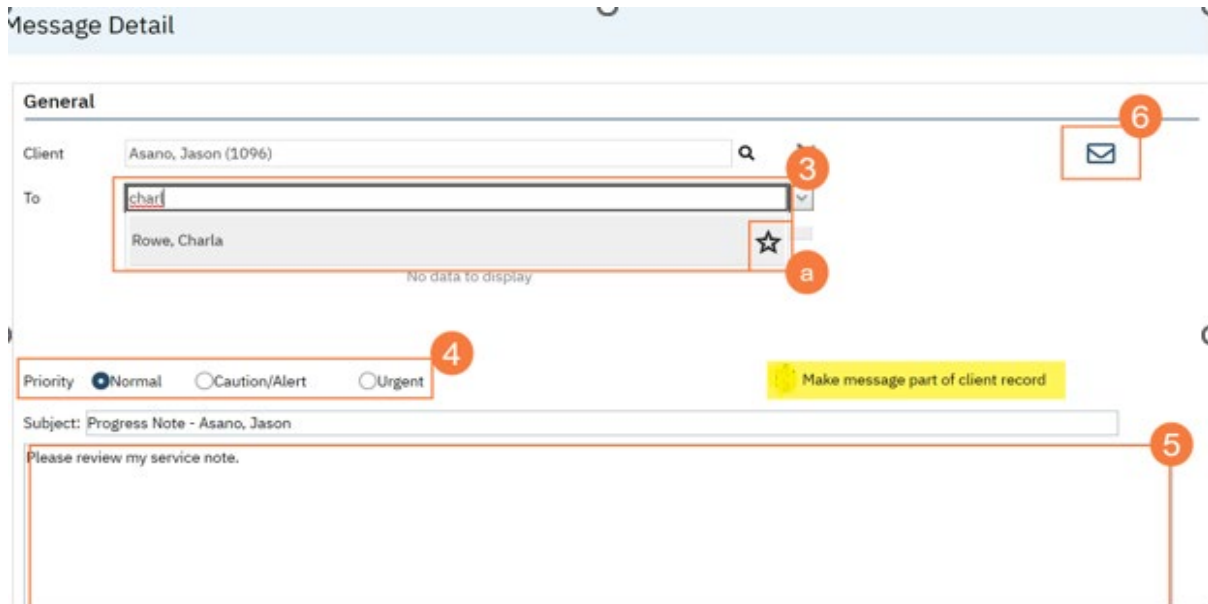
For Clinician/Primary:

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.



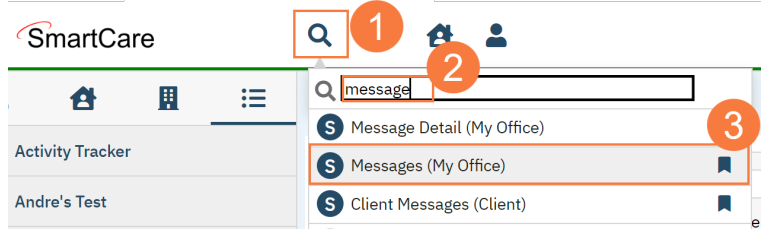
3. **Click in the To box and begin to type the staff member's name.**
 - a. To save this person as a favorite **click the Star icon.**
4. **Click the radial button** to change the priority from Normal if it applies.
5. **Click in the empty box below and type the message.**
6. **Click the mail icon** to send the message.
7. **Check box to make message part of the record.**



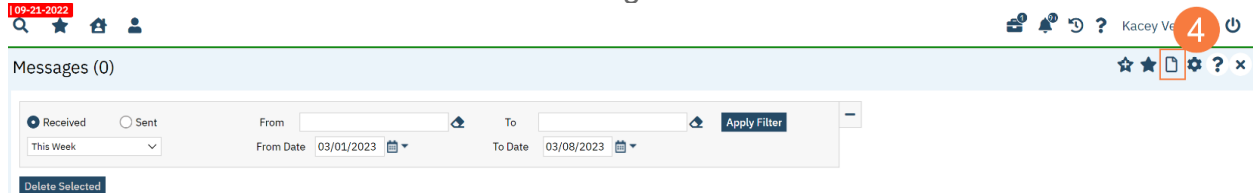
For HIT:

How to send a SmartCare message

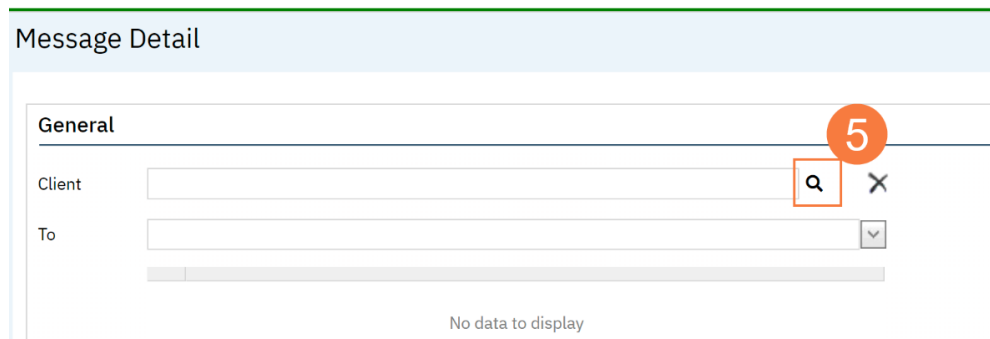
1. Click the Search icon.
2. Type Messages in the search bar.
3. Click to select Messages (My Office).



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 is a 'Clear' button and a search bar. Below the search bar, there are checkboxes for 'Include Client Contacts' and 'Only Include Active Clients'. The 'Name Search' section includes 'Broad Search' and 'Narrow Search' buttons, and a 'Type of Client' section with radio buttons for 'Individual' (selected) and 'Organization'. There are input fields for 'Last Name' (containing 'TestA'), 'First Name', and a 'Program' dropdown. The 'Other Search Strategies' section contains several search filters: 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', 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. A single record is shown with ID 1297, Master ID 1297, Client Name 'TestA, Shawn', Chosen Name 'TestA, Shawn', SSN/EIN 2222, DOB 05/31/20..., Status 'Active', and City 'Sacrame...'. A red box highlights the record, with a red circle '6' next to the 'Primary Clinician' column header. Below the table are 'Select' and 'Cancel' buttons, with a red circle '7' next to the 'Select' 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. Check box to Make Message part of the record.

The screenshot shows the 'Message Detail' window. The 'General' section has a 'Client' field with 'TestA, Shawn (1297)' and a search icon. To the right is a mail icon with a red circle '12'. Below is a 'To' field with a dropdown arrow and a red circle '8'. A 'scheduling' tag is visible. The 'Priority' section has radio buttons for 'Normal' (selected), 'Caution/Alert', and 'Urgent', with a red circle '9'. A red button labeled 'Make message part of client record' is to the right. The 'Subject' field contains 'Pt needs to reschedule appt' with a red circle '10'. Below is a large text area containing the message: 'Hello, The client called and is unable to make his appt tomorrow, can you please call and get him rescheduled.' with a red circle '11' at the bottom right.

Revision History

Date:	Section Revised:	Details of Revision:
7-23-2025	Original	