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

Purpose: Referral process between SLO Behavioral Health Department and TMHA Programs: Adult Transitional Program (ATP), Supportive Employment Program (SEP), Growing Grounds, and Community and FSP Housing.

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. For Housing Programs (ATP I, Bishop, CRP) use the Key Phrase template – TMHA Housing Referral Progress Note Template
 - b. For Vocational Program, SEP or Growing Grounds use the Key Phrase template- TMHA Referral Progress Note Template
2. Primary staff adds to the targeted case management (TCM) Service Note in SmartCare the co-signature request for their Program Supervisor, Health Information Technician (HIT), and the associated Transitions Mental Health Association (TMHA) Program Supervisor.
3. Primary staff send a SmartCare message (see appendix for how to) to their Program Supervisor, clinic Health Information Technician (HIT) and the associated THMA Program Supervisor noting the referral being made.
 - a. If the referral is for ATP I or Community Housing (Bishop, CRP), the Primary staff will have client complete the TMHA Application to Adult Transitional Programs (paper document).
 - b. Once complete, Primary staff will give application to clinic HIT to scan in and attach to referral in SmartCare.
 - c. Clinic HIT will notify TMHA Program Supervisor Application has been scanned in.
4. County 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 it has the referral information in it.

TMHA ATP I: Julie Baker

TMHA Community and FSP Housing: Cody LaMacchia-Meeks

TMHA SEP: Megan Murchison

TMHA Growing Grounds: Quentin Smith

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

TMHA SEP and Growing Grounds: TMHA Vocational (3205)

TMHA Community and FSP Housing:

TMHA Adlt Housing Bishop St (3270)

TMHA MHSA FSP Res - CRP (3242)

TMHA Res CRP - Comm Housing (3240)

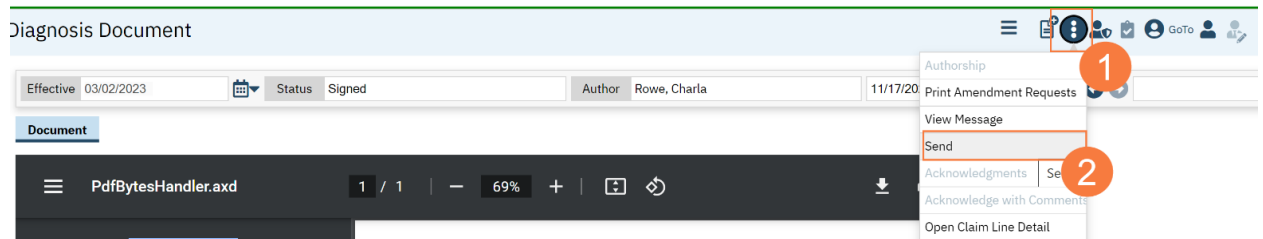
TMHA ATP I: TMHA ATP 1-Osos Street (3202)

- 5. When client is being placed into the program:
 - a. The associated TMHA Program Supervisor adds progress note regarding referral acceptance and sends using messages in SmartCare to the County staff and clinic HIT informing client is being placed into the program.
 - b. The clinic HIT changes the client's program from "requested" to "enrolled" as of date of acceptance progress note.
 - i. For Programs with a bed board, TMHA ATP, clients will be enrolled in the program when admitted on the bed board. **Clinic HIT should verify that programs are correct.**
 - c. When client has been enrolled in the **Vocational Program (3205) the clinic HIT will add Special Population** for Vocational/SEP or Growing Grounds as of the day of program enrollment.
- 6. For ATP I TMHA Program manager will document a 30-Day Review TCM Progress note in SmartCare using key phrasing template.
- 7. 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 and routed to Program Supervisor and County HIT. Ensure all documentation has been completed.
 - b. If the client is continuing services with other programs, document service ending and ensure all other documentation completed. Notify County HIT.
 - c. County HIT will audit chart(s) and close program(s) and update treatment team as appropriate.

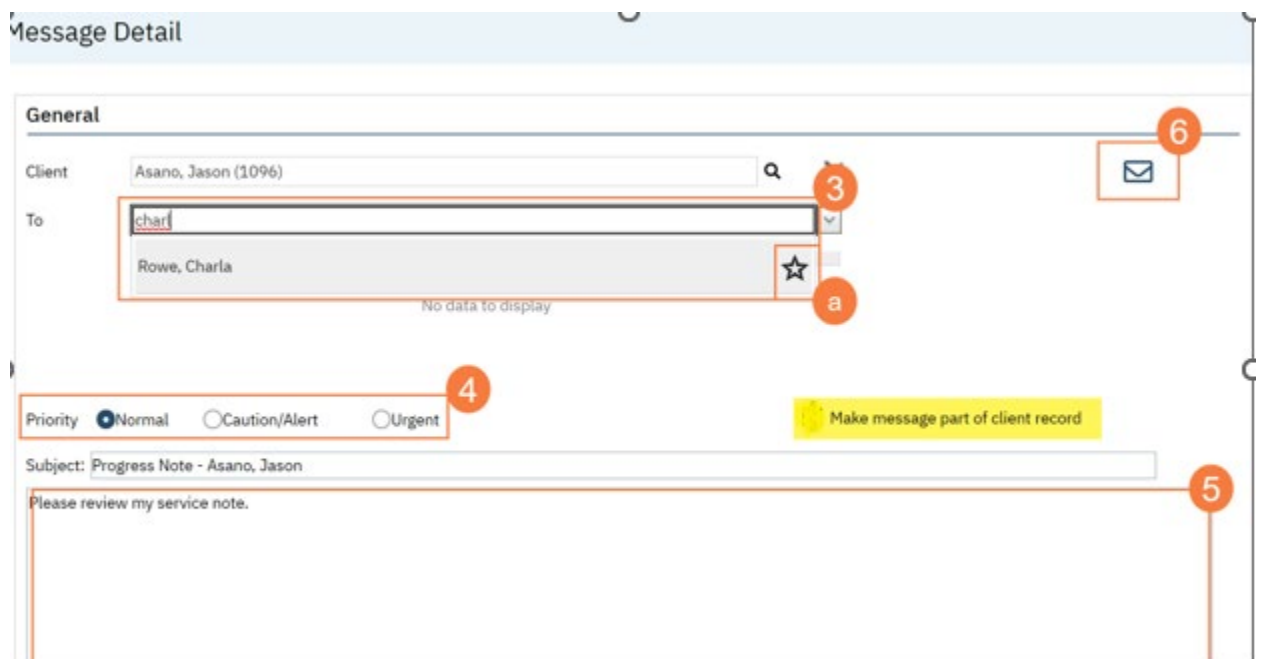
Appendix

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.

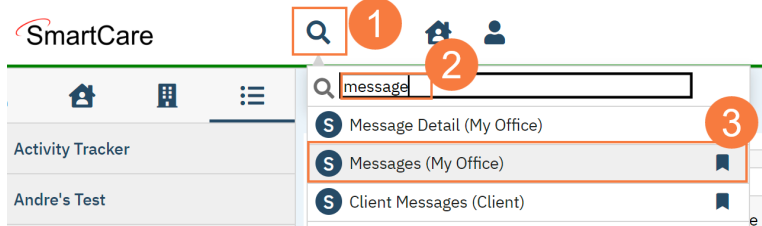


3. **Click in the To-box and begin to type the staff member's name.**
 - a. To save this person as a favorite **click on the Star icon.**
4. **Click the radial button** to change the priority from Normal if it applies.
5. **Click in the empty box below and type the message.**
6. **Click the mail icon**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

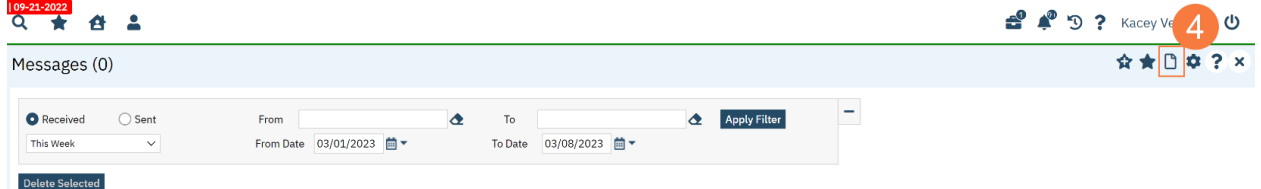


How to send a SmartCare message

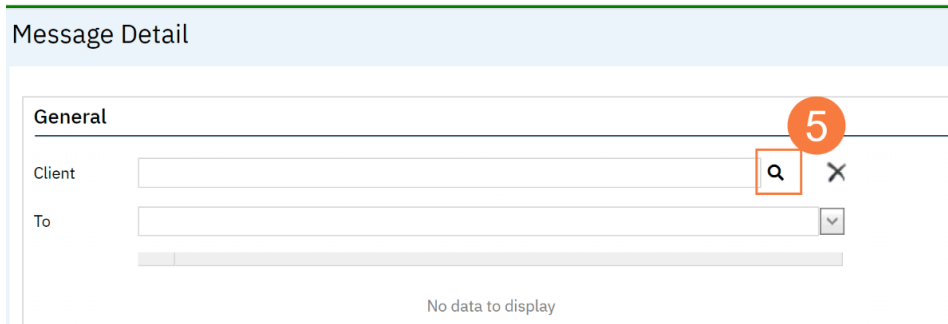
1. Click the Search icon.
2. Type Messages in the search bar.
3. Click to select Messages (My Office).



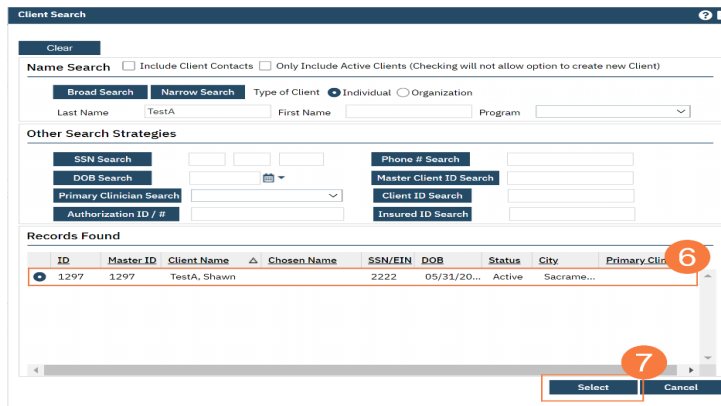
4. Click the New icon to create a new message.



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.



8. 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.

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 UNLESS MESSAGE CONTAINS NECESSARY COORDINATION INFORMATION.**

Message Detail

General

Client: TestA, Shawn (1297) [8]

To: [dropdown] [12]

✕ scheduling

Priority: Normal Caution/Alert Urgent [9]

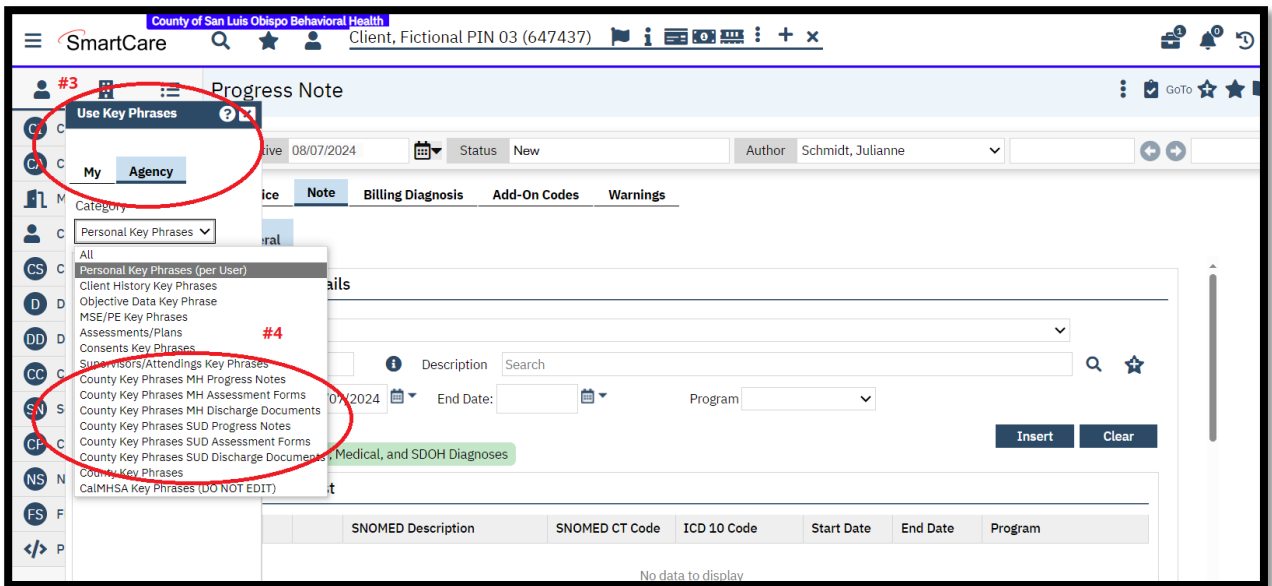
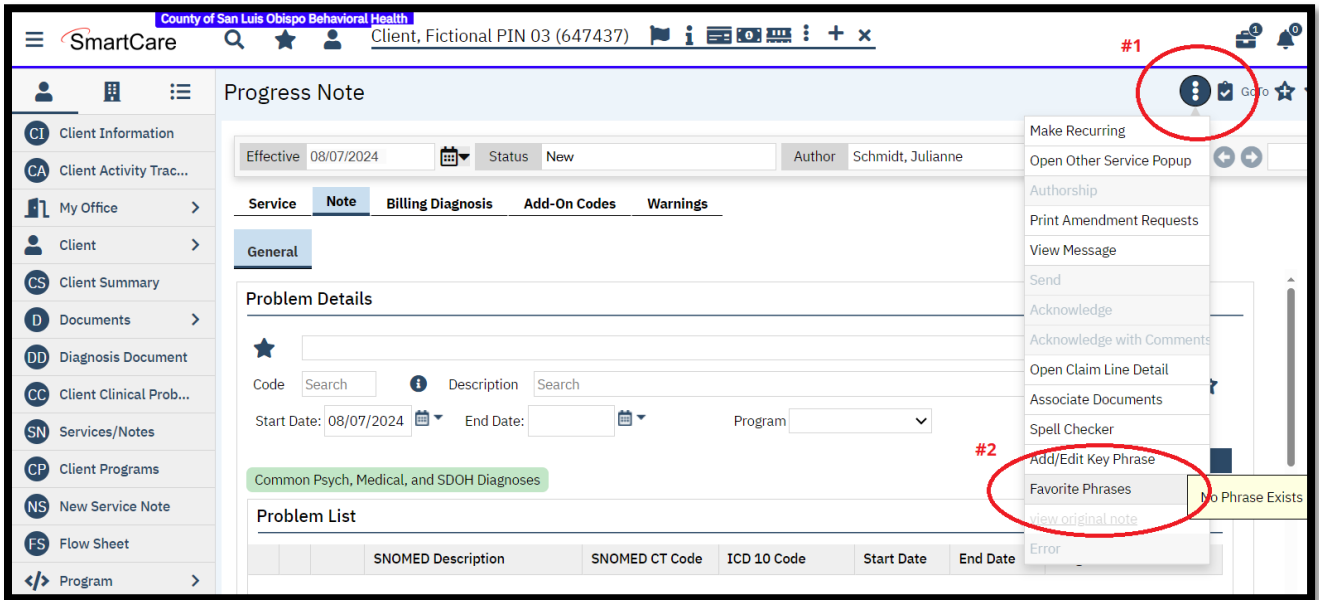
Make message part of client record

Subject: Pt needs to reschedule appt [10]

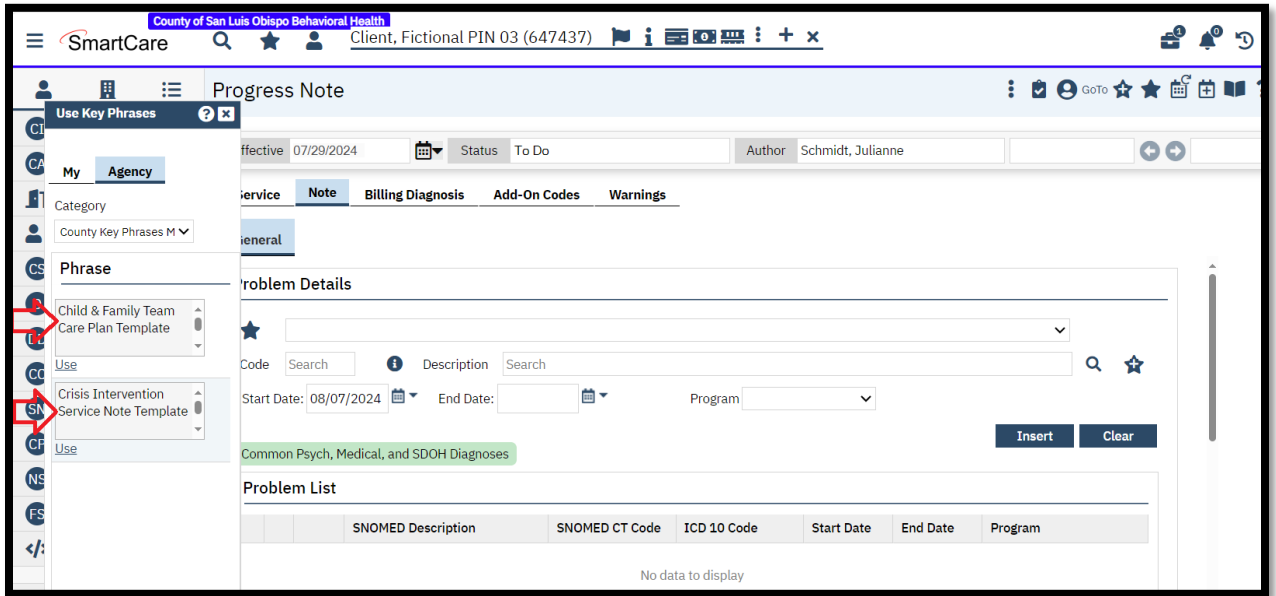
Message body [11]:
 Hello,
 The client called and is unable to make his appt tomorrow, can you please call and get him rescheduled.

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).



- 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.



Revision History

| Date: | Section Revised: | Details of Revision: |
|-----------|------------------|--|
| 8-01-2023 | Original | |
| 10-17-23 | Update | Growing Ground Staff |
| 10-3-2024 | Update | Add Key phrases, update programs and contact information. Update procedure. |
| 10-16-24 | Update | Remove Bridge Housing |
| 12-16-24 | Update | Add clarity to which Key Phrase to use for referral. Add Special Population Information for SEP and Growing Grounds. |