

Category:	<u>Subject:</u> TMHA Community Housing Referral Process
Behavioral Health	<u>Scope:</u> SLO Behavioral Health Department – Mental Health Services
	<u>Effective Date:</u> 7/27/2026

Purpose: Referral process between SLO Behavioral Health Department and TMHA Community Housing Programs: **TMHA Adult Housing Sustainability & Case Management BHSA**, and **TMHA Adult Housing Bishop Street Services BHSA**.

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. Use the Key Phrase template – TMHA Housing 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.
4. County clinic HIT opens the TMHA 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 name of referring staff and the date of the Service Note that has the referral information in it.
 - b. **TMHA Community Housing:** Cody LaMacchia-Meeks
 - c. TMHA Programs to assign as "requested":
TMHA Adult Housing Sustainability & Case Management BHSA
 - d. Pull Diagnosis forward into program.
 - e. Notify County Housing HIT of referral.
5. When client is being placed into the program:
 - a. The associated TMHA Program Supervisor adds a progress note regarding referral acceptance and sends using messages in SmartCare to the County staff and the County Housing HIT informing client is being placed into the program.
 - i. Note will include new address of the client, staff to be assigned, Program to be opened and Special Population to be opened.

- b. County Housing HIT changes the client's program from "requested" to "enrolled" as of date of acceptance progress note, makes note in program assignment comment box referencing date of the acceptance progress note.
 - c. County Housing HIT updates Treatment Team per the acceptance progress note.
 - d. County Housing HIT pulls forward the current diagnosis into the program.
- 6. For clients only open to Housing (client closed to County Clinic or ACT program) County Housing HIT will send monthly reports of annual documentation assessments due to Program Supervisor to be completed.
- 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 Housing 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 Housing HIT.
 - c. County Housing HIT will audit chart(s) and close program(s) and update treatment team as appropriate.

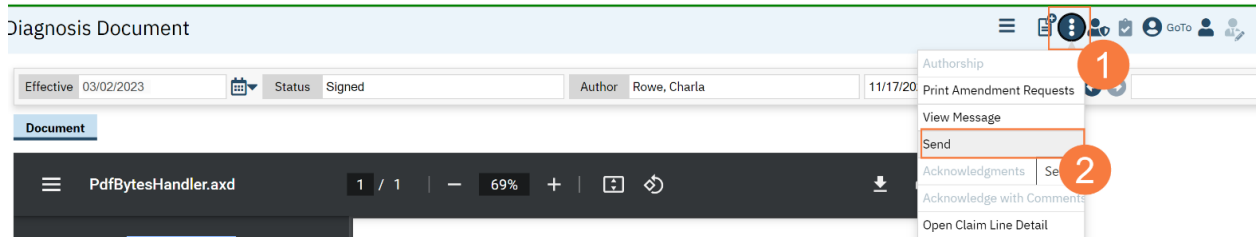
County Housing HIT Responsibilities

- Reports -Monthly
 - Flag Report for Items Needed/Due
 - Service Error and Scheduled Services Unresolved
 - Caseload Reports for last service information
- Maintain Community Housing Long Audit
 - Weekly check of program enrollment
 - Review of Flags and due dates in Audit
 - Update for new referrals, clients accepted into housing programs
- Process Acceptances, transfers, and closings for housing programs

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.**

Message Detail

General

Client: Asano, Jason (1096) 6

To: 3
 charl a
 Rowe, Charla ☆
 No data to display

Priority: ☒ Normal ☐ Caution/Alert ☐ Urgent 4

Make message part of client record

Subject: Progress Note - Asano, Jason 5

Please review my service note.

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)**.

SmartCare

1 2 3

Search: message

- Message Detail (My Office)
- Messages (My Office)**
- Client Messages (Client)

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

109-21-2022

Messages (0) 4

Received ☒ Sent ☐

From: To: Apply Filter

This Week

From Date: 03/01/2023 To Date: 03/08/2023

Delete Selected

5. Click the **Magnifying glass icon** next to the Client field and search for the client (if applicable).

Message Detail

General

Client  

To

No data to display

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

Client Search

Clear

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client ☒ Individual ☐ Organization

Last Name TestA First Name Program

Other Search Strategies

SSN Search DOB Search Primary Clinician Search Authorization ID / #

Phone # Search Master Client ID Search Client ID Search Insured ID Search

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
1297	1297	TestA, Shawn		2222	05/31/20...	Active	Sacrame...	

Select Cancel

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: 12

✕ scheduling

Priority: ☒ Normal 9 ☐ Caution/Alert ☐ Urgent

Make message part of client record

Subject: Pt needs to reschedule appt 10

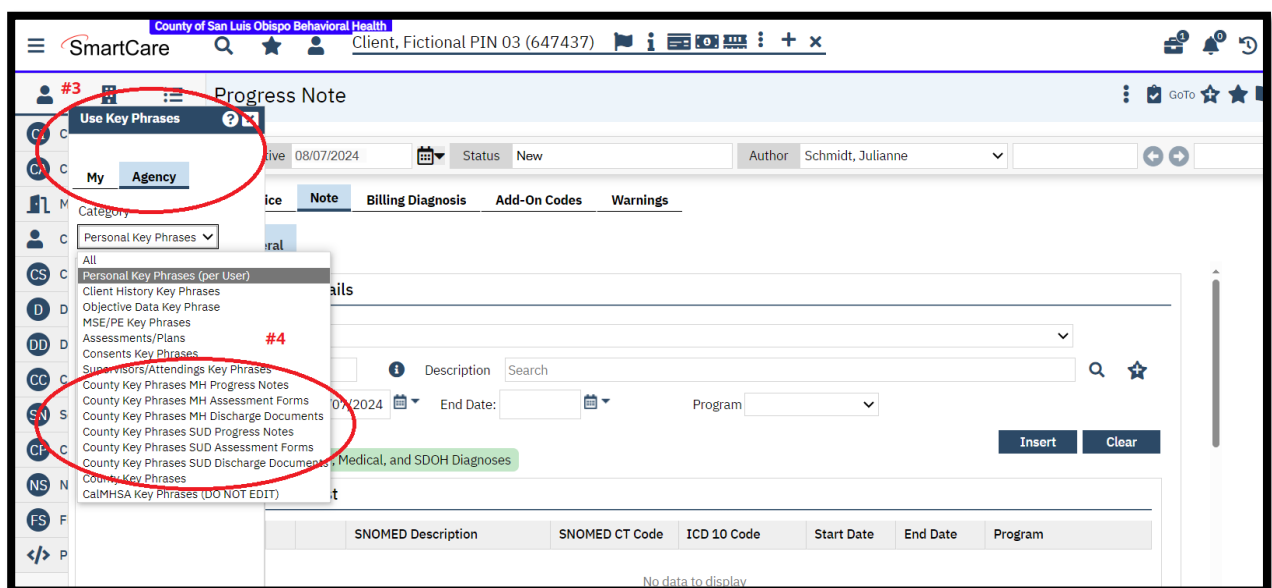
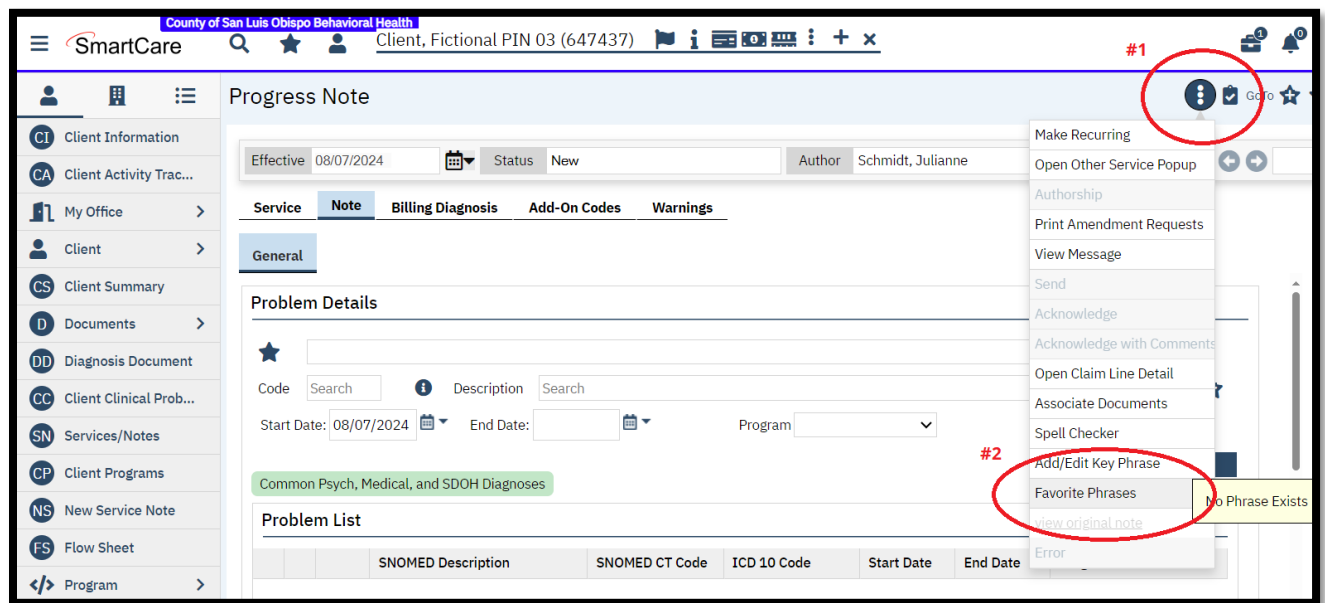
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Hello,

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.

SmartCare County of San Luis Obispo Behavioral Health Client, Fictional PIN 03 (647437)

Progress Note

Effective: 07/29/2024 Status: To Do Author: Schmidt, Julianne

Service: Note Billing Diagnosis Add-On Codes Warnings

General

Problem Details

Code Search Description Search

Start Date: 08/07/2024 End Date: Program

Common Psych, Medical, and SDOH Diagnoses

Problem List

SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program
No data to display					

Revision History

Date:	Section Revised:	Details of Revision:
7.27.2026	Original	