# **SmartCare Referral Workflow**

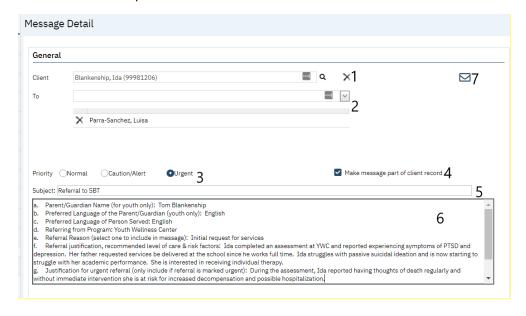
## This process does not apply to FSP referrals, AOT referrals, Child Welfare referrals

#### Sending a referral:

- 1. Create a new message in SmartCare
  - a. How to Send a Message 2023 CalMHSA
- 2. Utilize the "Referring Staff Message Template" to guide you on the content of your referral message.

#### Referring Staff Message Template:

- 1. Select person served who is the subject of the referral
- 2. Select designated staff from the team you are referring to
- 3. Priority (select one): Normal, Caution/Alert, Urgent
- 4. Make message part of client record: check this box
- 5. Subject: Referral to [insert name of program you are referring to]
  - a. Ex. Referral to Turning Point Rural- Kerman Clinic
- 6. Information for text box (copy/paste template below): \*There is a separate template for referrals to FCSS\*
  - a. Parent/Guardian Name (for youth only):
  - b. Preferred Language of the Parent/Guardian (youth only):
  - c. Preferred Language of Person Served:
  - d. Referring from Program:
  - e. Referral Reason (select one to include in message): Choose an item.
  - f. Referral justification, recommended level of care & risk factors:
  - g. Justification for urgent referral (only include if referral is marked urgent):
- 7. Push envelope icon to send



### Receiving a referral:

- 1. Open the referral message you received and reply utilizing the "Receiving Staff Message Template" to guide you on the content of your reply.
- 2. After you have sent the reply message open the client program list page and add the client to your program. How to Add the Client to Your Program 2023 CalMHSA
  - a. The requested date should be the date the referral message was sent to you.
  - b. The enrolled date should be the date you are assigning the client to a staff member in your program

#### **Receiving Staff Message Template:**

You will need to recheck the "Make message part of the record" box to make your reply part of the client record.

- 1. Review Message Details "To" section to determine how many individuals were included on the original message
  - a. If more than one individual was included you will need to add their name for them to receive the reply
- 2. Information for text box (copy/paste template below):
  - a. Approval Status: Choose an item.
  - b. Approved/Denied Comments:
- 3. Push envelope icon to send

#### Example:

