

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

Message Detail

General

Client: Blankenship, Ida (99981206) x1 7

To: 2
Parra-Sanchez, Luisa

Priority: Normal Caution/Alert Urgent 3 Make message part of client record 4

Subject: Referral to SBT 5

a. Parent/Guardian Name (for youth only): Tom Blankenship
b. Preferred Language of the Parent/Guardian (youth only): English 6
c. Preferred Language of Person Served: English
d. Referring from Program: Youth Wellness Center
e. Referral Reason (select one to include in message): Initial request for services
f. Referral justification, recommended level of care & risk factors: Ida completed an assessment at YWC and reported experiencing symptoms of PTSD and depression. Her father requested services be delivered at the school since he works full time. Ida struggles with passive suicidal ideation and is now starting to struggle with her academic performance. She is interested in receiving individual therapy.
g. Justification for urgent referral (only include if referral is marked urgent): During the assessment, Ida reported having thoughts of death regularly and without immediate intervention she is at risk for increased decompensation and possible hospitalization.

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 CalMHS](#)
 - 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:

Messages (1)

Received Sent From: [] To: [] [Apply Filter](#)

This Week From Date: 06/13/2023 To Date: 06/20/2023

Delete Selected

<input type="checkbox"/>	Status	From	Date Sent/Received	Client	Subject	Priority	Reference
<input type="checkbox"/>	Read	Caldwell, Melissa	06/16/2023 04:58 PM	Wormwood, Matilda	REFERRAL	Normal	Messages

[Reply](#) [Forward](#)

Details 1

To: Rosen, Amanda From: Caldwell, Melissa Date: 06/16/2023 4:58 PM Reference: Messages

Client: Wormwood, Matilda Subject: REFERRAL

this is my test

Message Detail

General

Client: Wormwood, Matilda (99981204) 3

To: [] 1a
 Caldwell, Melissa

Priority: Normal Caution/Alert Urgent Make message part of client record

Subject: Re: Referral to SHINE

a. Approval Status: Approved
b. Approved/Denied Comments: Person served will be contacted to schedule intake appointment. 2

--Original Message --
From: Caldwell, Melissa
To: Rosen, Amanda
Date: 06/16/2023 4:58 PM