**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
	1. [How to Send a Message - 2023 CalMHSA](https://2023.calmhsa.org/how-to-send-a-message/)
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]
	1. *Ex. Referral to Turning Point Rural- Kerman Clinic*
6. Information for text box **(copy/paste template below)**:
	1. School Name (youth only):
	2. District Name (youth only)
	3. Parent/Guardian Name and Contact Information (youth only):
	4. Preferred Language of the Parent/Guardian (youth only):
	5. Preferred Language of Person Served:
	6. Referring from Program:
	7. Referral Reason (select one to include in message): Choose an item.
	8. Referral justification, recommended level of care & risk factors:
	9. 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](https://2023.calmhsa.org/how-to-add-the-client-to-your-program/)
	1. The requested date should be the date the referral message was sent to you.
	2. 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
	1. 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)**:
	1. Approval Status: Choose an item.
	2. Approved/Denied Comments:
3. Push envelope icon to send

Example:



