

Module 6: Referral, Screening, Assessment & Consent



Ongoing communication between the referring school staff, behavioral health provider and the student's family is essential, especially when a student is transitioning into care.

The behavioral health provider will document the status of the referral, screening, assessment and treatment on the [Monthly Communication Log](#).

School staff initiates the referral process using the [SchoolLink Referral Form](#).

Steps Required for a Successful Referral Process

1. Complete the Referral Form

Include all of the necessary informational elements, including parent/guardian consent to refer and authorization to release information.

2. Follow Submission Protocol

Use the agreed-upon campus protocol detailed in your Annual SchoolLink Plan to forward the referral to the provider. Remember - referrals should NEVER be sent via unencrypted email.

3. Document Referral Was Made

School staff should document the referral submission per their school site documentation system established at the SchoolLink Annual Meeting.



Eligibility Screening

The behavioral health provider receives the SchoolLink referral and initiates the eligibility screening process. See below to review the formalized steps for the eligibility screening process.

1. Contact guardian* for eligibility screening

The provider contacts the student's parent/guardian to screen for whether the student's symptoms and financial status meet SchoolLink eligibility criteria.

*If student is providing minor consent for services, provider would conduct screening with the student.

2. Determine if additional screening is needed

Sometimes school staff identify behavioral health concerns that the parent/guardian minimizes or dismisses during the eligibility screening. In these instances, the provider uses their clinical judgment to determine if a more thorough behavioral health assessment is needed. Additionally, if the student appears to be experiencing challenges related to both mental health and substance use, the provider may refer the student for a co-occurring assessment to determine the need for integrated treatment.

3. Student meets SchoolLink eligibility criteria

If it appears that the student meets SchoolLink criteria during the screening, the provider schedules an in-person behavioral health assessment with the parent/guardian and student.

4. Student does not meet SchoolLink eligibility criteria

If the student does not meet SchoolLink eligibility criteria, the provider will connect the family to the appropriate resource and notify the school through the Monthly Communication Log.



Best practices to make first contact with the family:

- School staff makes an in-person or phone introduction between the provider and guardian.
- If an in-person introduction is not feasible, school staff contacts the guardian and lets them know to expect a call from the behavioral health provider.
- Provider calls the guardian at various times of the day until they connect.
- Provider sends a letter via mail asking the guardian to call at their convenience.
- If appropriate, the provider asks the student to call the parent together with the provider from the student's cell phone.
- If the provider is unable to connect with the parent after multiple attempts, the provider asks school staff for help.

Assessment

The behavioral health provider completes a thorough in-person behavioral health assessment as the final step in the referral process before a student begins treatment.

1. Schedule a Behavioral Health Assessment

The provider schedules a thorough, in-person behavioral health assessment with the parent/guardian and the student. If needed, multiple dates, times and locations should be offered to the family.

2. Re-Confirm Eligibility Criteria

The provider re-confirms SchoolLink eligibility criteria during the assessment. If the provider determines that the student does not meet SchoolLink eligibility criteria, the provider will connect the family to the appropriate resources and notify the school through the Monthly Communication Log.

3. Obtain Required Consents

During the assessment, the provider obtains written consent for treatment and authorization to disclose limited information between the provider and the school. The disclosure authorization is required to participate in SchoolLink services because school staff will know the student is in therapy when they are pulled from class. The Confidentiality module (module 10) details what information can and cannot be shared between the provider and the school.

Note: *In the rare times when the parent/guardian does not want information shared between the provider and the school, the provider will refer the student to community-based services where this is not required.*

Best practices if the provider is unable to contact the family, but the student and/or school staff want services:

- Provider asks the school to set up a meeting with the guardian at the school to sign required consent forms
- Provider gives the required consent forms to the student to bring home to parent/guardian for signatures
- Provider mails the consent forms to the parent/guardian's home
- Provider offers multiple dates, times and locations for the behavioral health assessment



Student may be able to consent for their own services, depending on additional factors and may be eligible to obtain Minor Consent Medi-Cal (detailed on page 4)

Consent Exceptions

Minors 12 or older may consent to their own treatment, if, in the opinion of the attending professional person, the minor is mature enough to participate intelligently in the outpatient services. If school staff have concerns related to obtaining guardian consent, they should discuss them directly with the behavioral health provider. *Under certain circumstances, minors may also be eligible to obtain Medi-Cal independent of their guardian, this is known as Medi-Cal Minor Consent Services (medi ca minor)



Resources:

- [Monthly Communication Log](#)
- [SchoolLink Referral Form](#)
- [BHIN 24-046 Minor Consent to Outpatient Mental Health Treatment or Counseling](#)
- [AB 665 Minor Consent Mental Health Services Fact Sheet - The Children's Partnership](#)
- [AB 665 Fact Sheet 4.1](#)
- [Medi-Cal Minor Consent Services \(medi ca minor\)](#)
- [Eligibility](#) and [Minor Consent Flyer.pdf](#)

Key Point

Successful student referrals depend upon teamwork and:

- Accurate completion and forwarding the referral form.
- Following initial screening and behavioral health best practices.
- Asking the other party for help, when you need it.
- Helping the student and their family connect to the right care, even if it is off campus.

Key Terms

Behavioral health services: A continuum of prevention, intervention, treatment and recovery support services for mental health and substance use.

County-funded: Services funded through the County of San Diego's Health & Human Services Agency's Behavioral Health Services Division.

Provider: Unless otherwise specified, a County-funded behavioral health provider.

Administrative Information

For administrative information or to provide feedback about the [SchoolLink training program](#), please email BHSContactUs.HHSA@sdcounty.ca.gov with subject line: SchoolLink