



Records Release Protocol for TERM Juvenile Probation Evaluations

(Updated July 2024)

To ensure TERM Probation evaluators have relevant clinical information, updates have been made to the mental health record release process for TERM psychological evaluations. Effective April 1, 2021, the Juvenile Court will send a copy of the minute order requesting a psychological evaluation to the County of San Diego Health Information Management Services (HIMS).

HIMS will send via a secure email a copy of the Client Roster Report (“tracking log”) to the assigned evaluator, if available. The Client Roster Report is a log of treatment episodes in many programs in the County of San Diego System of Care. Generally included on this report are treatment episodes with:

- Fee-For-Service Medi-Cal providers
- County-contracted outpatient programs
- Wraparound services
- Therapeutic Behavioral Services (TBS)
- Emergency Screening Unit (ESU)
- Inpatient psychiatric hospitalizations funded by Medi-Cal/County in San Diego County hospitals

Please note the Client Roster Report is **NOT** a comprehensive list, notable exceptions may include

- Some residential treatment care (depending on placing agency)
- Hospital emergency department visits
- Substance use disorder treatment
- Treatment through school districts via IEP/Educational Related Mental Health Services (ERMHS)
- Treatment through private health insurance
- Federally Qualified Health Centers

If a youth received care while in the juvenile detention facilities, the evaluator shall receive select clinical records via secure email. The Behavioral Health Services STAT-Team is a County-operated clinical program that provides care to youth detained in the juvenile detention facilities. Records will be email from the STAT-Team directly. Records that shall be shared may include, if available:

- STAT Behavioral Health Assessment (assessment completed by a clinician for youth receiving STAT services >30 days)
- STAT Psychiatric Assessment
- STAT High-Risk Assessment
- STAT Medication Progress Notes
- STAT Diagnosis Page
- STAT Discharge Summary

If there are no contacts on the Client Roster Report or clinical records available from the BHS STAT-Team, HIMS will send an email to the evaluator noting there were no available records.



The minute order includes the following language regarding mental health records for the purposes of court-ordered evaluations:

PY190: All records, including but not limited to medical, education, special education, probation, child welfare, mental health, regional center, and court records regarding the youth, shall be made available upon request to the evaluator assigned to the case. Use of these records is for the sole purpose of preparing the court-ordered evaluation and report. The records shall not be used for any other purpose.

Should additional records be required, this minute order may be used. Behavioral Health Services works to educate providers and system partners about court-ordered evaluations and the language of the minute order to providers.

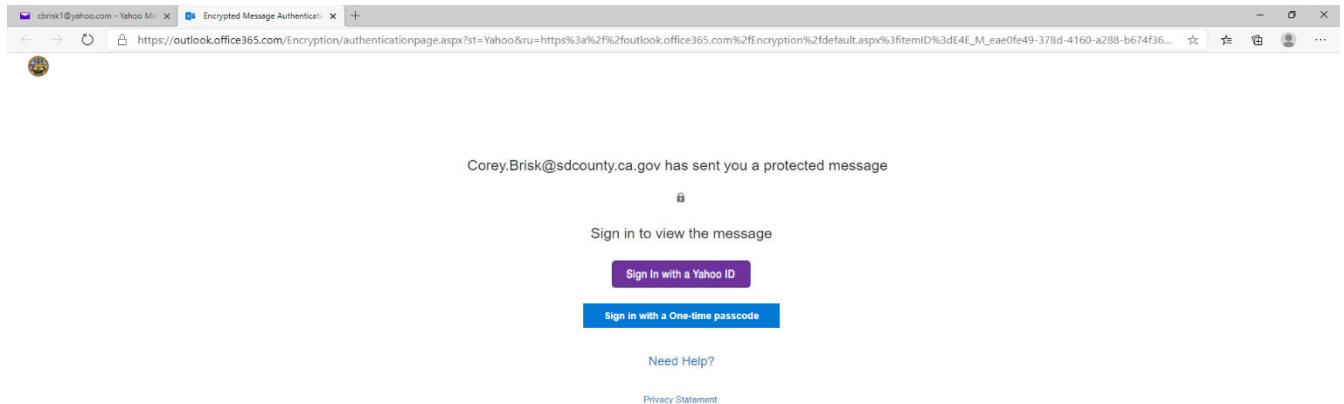
For Evaluator assistance please call the TERM Line:

1-877-824-8376, Option 1

[*Steps to Review San Diego County Encrypted Email:](#)

In your encrypted email, click on the "Read the Message" button

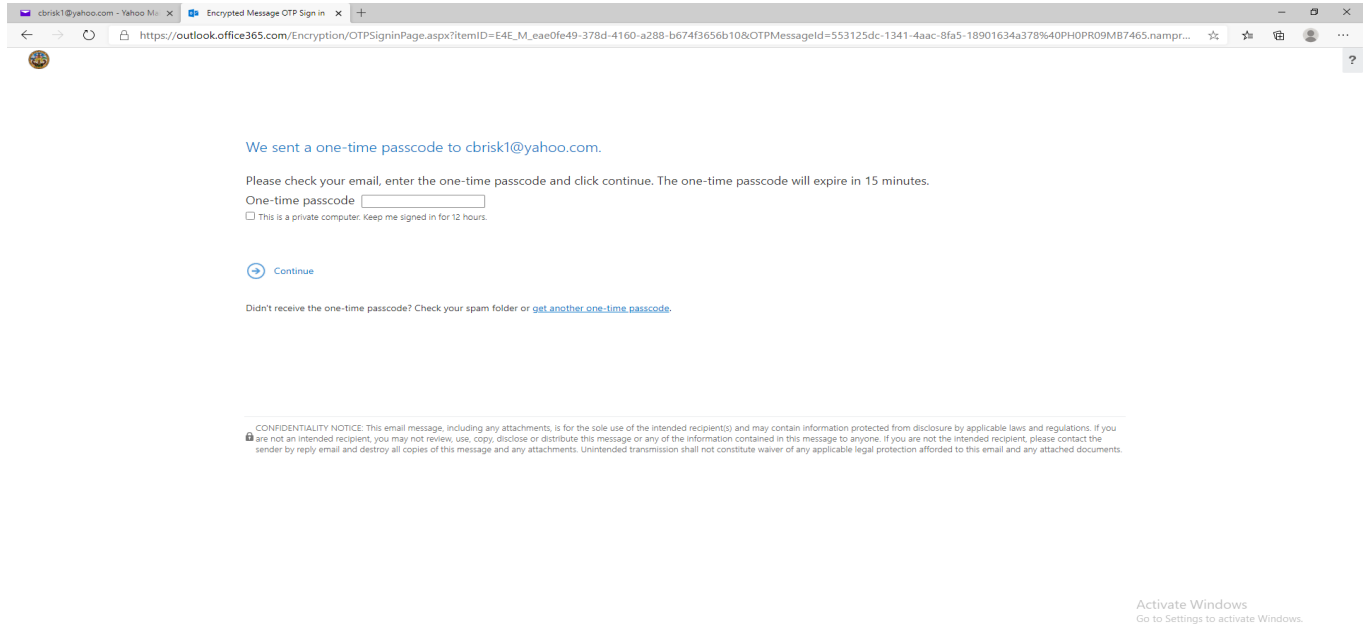
Click on the "Sign in with a One-time passcode" button



Activate Windows
Go to Settings to activate Windows.



You will receive the message below in your Email:



Enter in the "One-Time" passcode field

Click on Continue

View your email and attachments.