



State Hospital Referral Documentation Requirements

Documentation needed by Optum:

- Referral Screening Form requesting State Hospital
- Case Manager Recommendation Form requesting State Hospital
- San Diego County Medi-Cal (eligibility/POS Strip) or written statement from Case Manager that they believe client is eligible for Medi-Cal and that Case Management is taking responsibility for following up on the Medi-Cal status
- Proof of SSI if not included on Case Manager Recommendation Form or written statement from Case Manager that they believe the client is eligible for SSI and that Case Management is taking responsibility for following up on the SSI status
- Electronic Short Doyle Form

Documentation needed by State Hospital:

State Hospital referrals require that documents be submitted in the following order. Please use the dividers (beginning on next page) to identify the documents.

Document	Yes	No
1-CONSERVATORSHIP (No T-Con ORDERS) */Legal		
2-CONSENT FOR TREATMENT (MSH FORM) Signed by Conservator		
3-COMPREHENSIVE PSYCHIATRIC EVALUATION* (Completed by a Physician within the last 30 days)		
4-PSYCHIATRIST PROGRESS NOTES- LAST 10 DAYS*		
5-PHYSICIAN ORDERS- LAST 10 DAYS ONLY*		
6-MOST RECENT PHYSICAL EXAM AND MEDICAL HISTORY*		
7-NURSING NOTES- LAST 10 DAYS*		
8-PSYCHOSOCIAL HISTORY*		
9-LAB and DIAGNOSTIC RESULTS*		
10-CURRENT MEDICATIONS AND DOSAGES *		
11-PPD-MOST RECENT *		
12-ADVANCE HEALTH CARE DIRECTIVE (if applicable)		

Additional COVID-19 related required documents

** Please check with Optum staff to see if these items continue to be required

Document	Yes	No
13 -The COVID-19 Admission Clearance Memo Form (attached) (needs to be completed 48-24 hours before admission)		
14-COVID-19 Test Results (testing must be within 3 days of admission)		
15-Scanned copy of COVID-19vaccination card or at minimum, all the information that appears on the COVID-19 vaccination card: Type (Moderna, Pfizer, etc.), Lot Number, Dates, Clinic Site		

Section 1:

**Referral Screening Form Requesting State
Hospital**

**Case Manager Recommendation Requesting State
Hospital**

**Documentation of San Diego County Medi-Cal
(eligibility/POS Strip)**

**Documentation of SSI if not included on Case
Manager Recommendation Form**

Section 2:

Proof of Conservatorship

Court Investigator Report

Current Letters and Orders

Section 3:

Consent for Treatment (MSH Form)

San Diego County Conservator is unable to sign this form until there is an acceptance and a tentative admission date. Once accepted, the Conservator's Office will complete the Consent for Treatment and Voluntary Application for Treatment Form

Section 4:

**Comprehensive Admission/Initial Psychiatric
Evaluation**

Psychiatric H&P

Section 5:

Physician Orders

Last 7 days only

Section 6:

Physical Exam and Medical History

Includes Internal Medicine H&P and Nursing
Assessment

Section 7:

Labs and Diagnostic Results

Section 8:

Psychiatrist's Progress Notes

Last 7 days

Section 9:

Psychosocial History

Section 10:

Nursing Notes

Last 7 Days

Section 11:

Current Medications and Dosages

Section 12:

PPD

Most Recent

Section 13:

Advance Health Care Directive

Section 14:

Short Doyle Form

Section 15:

COVID-19 Forms