



Documentation Needed for State Hospital Referral

State Hospital referrals require that these documents be submitted in the following order. Please use the dividers to identify the documents since document titles may differ from the language used by the state hospital.

Documentation needed by Optum:

- Referral Screening Form requesting State Hospital
- Case Manager Recommendation requesting State Hospital
- Documentation of San Diego County Medi-Cal (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
- Documentation of SSI if not included on Case Manager Recommendation form 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
- Electronic Short Doyle Form

Documentation needed by State Hospital:

DOCUMENT REQUIRED	YES	NO
1-PROOF of CONSERVATORSHIP or LEGAL STATUS*		
2-CONSENT FOR TREATMENT (MSH FORM) Signed by Conservator*		
3-COMPREHENSIVE ADMISSION/INITIAL PSYCHIATRIC EVALUATION Done by a Physician within the last 30 days*		
4-PHYSICIAN ORDERS, LAST 7 DAYS ONLY*		
5- MOST RECENT PHYSICAL EXAM AND MEDICAL HISTORY*		
6- LAB and DIAGNOSTIC RESULTS*		
7- PSYCHIATRIST'S PROGRESS NOTES, LAST 7 DAYS ONLY*		
8-PSYCHOSOCIAL HISTORY*		
9- NURSING NOTES LAST 7 DAYS ONLY*		
10-CURRENT MEDICATIONS AND DOSAGES*		
11-PPD-MOST RECENT		
12-ADVANCE HEALTH CARE DIRECTIVE		

Optum LTC Fax at (888) 687-2515. Optum LTC Phone: 800 798-2254 Option 6

Referral Screen Form Requesting State Hospital

Case Manager Recommendation Requesting State
Hospital

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

Documentation of SSI if not included on Case Manager
Recommendation Form

Proof of Conservatorship

Court Investigator Report

Letters and Orders

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.

COMPREHENSIVE ADMISSION/INITIAL
PSYCHIATRIC EVALUATION

Psychiatric H & P

PHYSICIAN ORDERS

Last 7 days only

Physical Exam and Medical History

Includes Internal Medicine H & P and Nursing
Assessment

LABS AND DIAGNOSTIC RESULTS

PSYCHIATRIST'S PROGRESS NOTES

Last 7 days

PSYCHOSOCIAL HISTORY

NURSING NOTES

Last 7 days

CURRENT MEDICATIONS AND DOSAGES

PPD

Most Recent

ADVANCE HEALTH CARE DIRECTIVE

SHORT DOYLE FORM