



LOS ANGELES COUNTY
**DEPARTMENT OF
MENTAL HEALTH**
hope. recovery. wellbeing.

Service Request Tracking System (SRTS) 2.0

Provider Portal Application User Manual

Version 2024.3.0

November 13, 2024

Table of Contents

Purpose	3
Accessing the Application	4
SRTS Home	4
Provider Home View	5
How to Create a New SRTS Service Request.....	7
Client Information	8
Contact Information for this Request	11
All Service Requests for Selected Client.....	12
Service Request Information.....	12
Requester/Referring Party	16
Mental Health Information	17
Screening Tool.....	19
Notes	21
How to Modify or Delete Notes	22
Attachments.....	24
How to Edit Attachments.....	25
How to Delete Attachments	26
Transfers	27
Transfer Email Notification	30
O & E / Contact Attempts	30
How to Edit O & E / Contact Attempts Records.....	32
Disposition	32
Medication Appointment Information	34
FSP Authorization.....	36
Search Referrals	36
Need Help?.....	37

Purpose

The Service Request Tracking System (SRTS) is a web-based electronic application that serves two primary purposes. First, the SRTS includes all the required data elements of the LACDMH Service Request Log/SRL ([MH 718](#)) and is a Department-approved process used to document an initial request for specialty mental health services (SMHS). Per regulations, all initial requests for services must be recorded in the SRL or SRTS regardless of the site. This includes a potential client who does not yet have a clinical record or a client returning for services after termination/inactivity (see LACDMH Policy [302.14](#)). SMHS may be sought by the client or someone on behalf of the client, either directly or through a referral, in person, in writing, through a phone call or any other means. The date of the initial request is the date that the LACDMH, including its contractors, becomes aware of the request.

The SRTS is used by LACDMH providers and administrative linkage sites, (e.g., LACDMH ACCESS Center, Service Area Navigators, Countywide Resource Management, etc.) to log and transfer requests to an appropriate service provider. If a provider receives an initial request for services via the SRTS from another mental health provider, the disposition of that request is required to be entered into the SRTS by the receiving provider and, if applicable, the closure reason. All LACDMH providers are required to log initial requests for services that they are referring to other LACDMH provider sites, and to receive referred requests from other LACDMH provider and administrative sites.

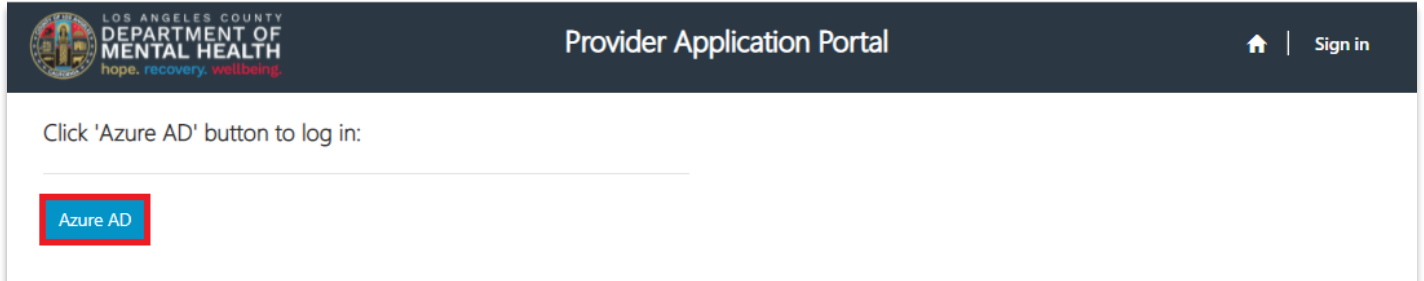
SRL and SRTS data are monitored by LACDMH to ensure provider- and system-level compliance with all State requirements, ensure individuals are appropriately provided access to services, track time frames related to access to care, and monitor where referrals for services are coming from for potential or inactive clients.

Accessing the Application

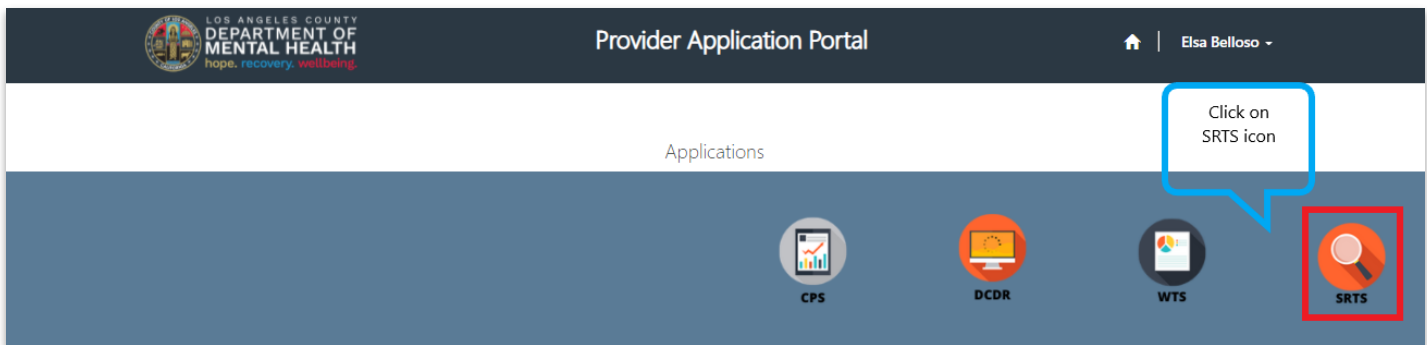
To access SRTS Portal Application, copy and paste the below URL into your web browser. The recommended browsers are Google Chrome and Microsoft Edge.

Provider Application Portal Link: <https://lacdmhpp.powerappsportals.us>

Click on Azure AD to login to SRTS



You will see one or more DMH applications you have access to; click on the SRTS icon.



SRTS Home

The **SRTS Home** page lists your associated program(s). Click on the **Program** code you will perform tasks from.

Home > SRTS Home

Program ↑	Program Name (Program)
190DA	190DA PENNY LANE CENTERS-SATELLITE IX
19BYA	19BYA MHA PALMDALE ADULT INTEGRATED SRVS
19C8A	19C8A SSG PROJECT 180 SOLA
19D9A	19D9A EXODUS CENTRAL FSP

Provider Home View

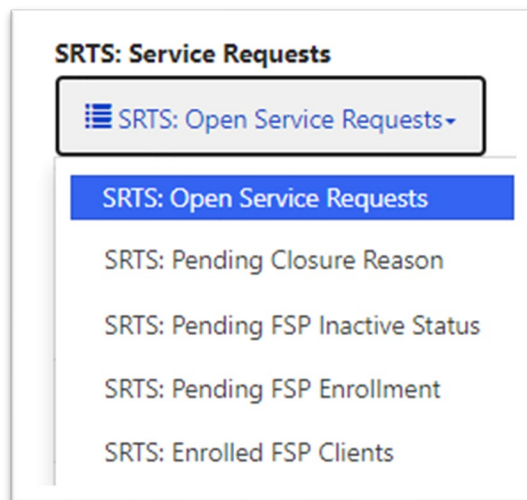
When you arrive at your location's home page, you will see the following:

The screenshot displays the 'Service Request Tracking System' interface. At the top, there is a breadcrumb trail (1) 'Home > 7019A ALMA FAMILY SERVICES > Service Request List' and a link (2) 'Go to Service Requests Initiated By This Provider'. A navigation menu (3) shows 'SRTS: Open Service Requests' with a search bar (7) and a 'Create' button (8). The main content area contains two tables of service requests. The first table (4) lists records with columns: Tracking Confirmation #, Client Lookup, Client ID, Date of Birth, Age at the Time of Referral, Referral Category, Outpatient Type, FSP Type, Date and Time of Request, SR Current Location Name, and Provider Name Initiating Request. The second table (11) lists records with columns: Tracking Confirmation #, Client Lookup, Client ID (Client Lookup), Date of Birth (Client Lookup), Age at the Time of Referral, Referral Category, Outpatient Type, FSP Type, Date and Time of Request, SR Current Location Name, and Provider Name Initiating Request. A search bar (12) is located below the second table. Callouts 5, 6, and 13 point to specific UI elements like dropdown arrows and pagination controls.

Tracking Confirmation #:	Client Lookup	Client ID	Date of Birth	Age at the Time of Referral	Referral Category	Outpatient Type	FSP Type	Date and Time of Request ↑	SR Current Location Name	Provider Name Initiating Request	
001006					General Outpatient			6/29/2022 4:13 PM	7019A ALMA FAMILY SERVICES	190CA EXODUS IMHT	5
001015					FSP		Child/YA FSP	7/19/2022 9:00 AM	7019A ALMA FAMILY SERVICES	1904A ANTELOPE VALLEY MHC	
001016					General Outpatient	DCFS/ER Hotline		7/19/2022 11:00 AM	7019A ALMA FAMILY SERVICES	1904A ANTELOPE VALLEY MHC	
001031					General Outpatient			7/20/2022 9:53 AM	7019A ALMA FAMILY SERVICES	7876A KEDREN CMHC	
001021					General Outpatient			7/20/2022 2:00 PM	7019A ALMA FAMILY SERVICES	190AA PENNY LANE CENTERS-SATELLITE VII	
001022					FSP		Child/YA FSP	7/20/2022 2:05 PM	7019A ALMA FAMILY SERVICES	190CA EXODUS IMHT	

Tracking Confirmation #:	Client Lookup	Client ID (Client Lookup)	Date of Birth (Client Lookup)	Age at the Time of Referral	Referral Category	Outpatient Type	FSP Type	Date and Time of Request ↓	SR Current Location Name	Provider Name Initiating Request	
001068					General Outpatient			10/3/2022 6:00 PM	1906A EDMUND D EDELMAN WESTSIDE MHC	7019A ALMA FAMILY SERVICES	
001062					FSP		Child/YA FSP	9/23/2022 10:04 AM	7080T KEDREN CMHC	7019A ALMA FAMILY SERVICES	
001061					General Outpatient	DCFS/ER Hotline		9/23/2022 10:03 AM	7019A ALMA FAMILY SERVICES	7019A ALMA FAMILY SERVICES	
001060					FSP		Child/YA FSP	9/22/2022 10:02 AM	7019A ALMA FAMILY SERVICES	7019A ALMA FAMILY SERVICES	

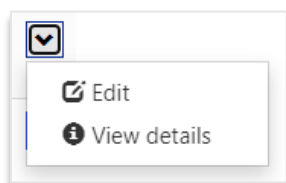
1. Breadcrumb trail – shows where you are in the record
2. **Go to Service Requests Initiated By This Provider** - click on link to take you to the section at the bottom of the home page
3. Current records view – the dropdown arrow at the end of the listed view reveals views for records that are Open, Pending Closure Reason, Pending FSP Enrollment, and Enrolled FSP Clients
 - **Open Service Requests** – displays records that do not have a disposition
 - **Pending Closure Reason** – displays records that have a disposition where a closure reason is required: Appointment given or Untimely appointment given at this site, referral declined.
 - **Pending FSP Inactive Status** - applies to FSP requests only. Records that have been approved for FSP and have an appointment scheduled but the client did not enroll in FSP.
 - **Pending FSP Enrollment** – applies to FSP requests only. Records that have been approved for FSP and have an appointment scheduled but are awaiting confirmation for whether a client enrolls in FSP or not. If the client enrolls, an enrollment date will be required.
 - **Enrolled FSP Clients**– displays enrolled FSP clients at your site



- List of active records sitting at your location that requires action for that stage of the request. By default, the records are sorted in ascending order by Date and Time of Request, with the oldest record on top. You can sort in descending order by clicking on the header of that column. Any column that is in bold can be sorted in ascending or descending order. The arrow indicates which column is sorted and how the records are sorted.

Tracking Confirmation #:	Client Lookup	Client ID	Date of Birth	Age at the Time of Referral	Referral Category	Outpatient Type	FSP Type	Date and Time of Request	SR Current Location Name	Provider Name Initiating Request	
001006					General Outpatient			6/29/2022 4:13 PM	7019A ALMA FAMILY SERVICES	190CA EXODUS IMHT	▼
001015					FSP		Child/YA FSP	7/19/2022 9:00 AM	7019A ALMA FAMILY SERVICES	1904A ANTELOPE VALLEY MHC	▼
001016					General Outpatient	DCFS/ER Hotline		7/19/2022 11:00 AM	7019A ALMA FAMILY SERVICES	1904A ANTELOPE VALLEY MHC	▼

- Dropdown options per record – you have the option to edit the record from here or view the details of the record as a page view instead of the tabular view. If you choose to view the details, you will only be able to read the information and not edit from this view.

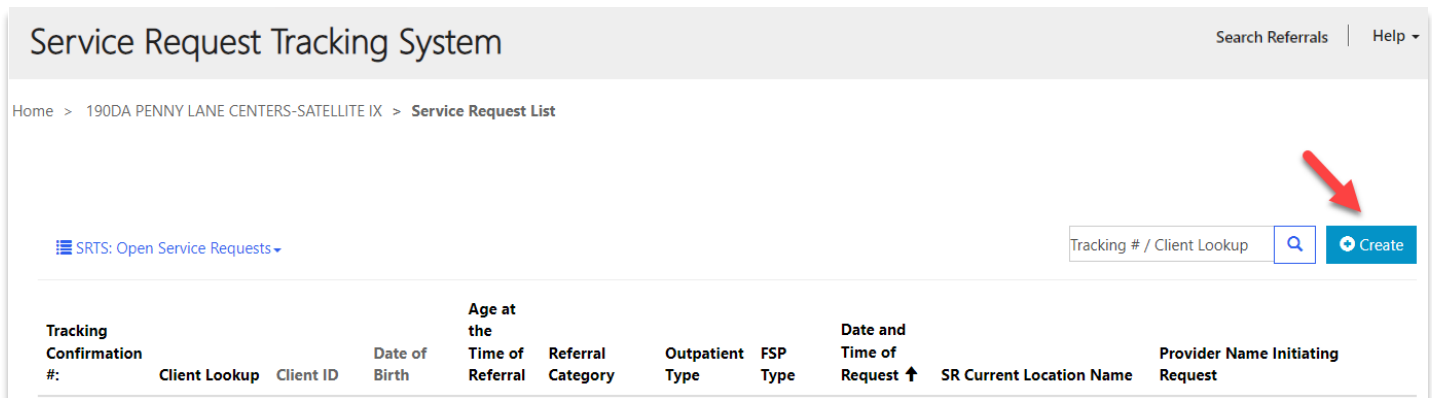


- Pagination – if you see multiple pages listed here, click into each page to view other records. Each page displays up to 25 records.
- Search field for current view/panel – you can search for records in the status view you are in: Open Service Requests, Pending Closure Reason, Pending FSP Inactive Status, Pending FSP Enrollment, or Enrolled FSP Clients. This will only search the records in your current view and does not search all the records at your site. For instance, if you are in the Open Service Requests view, it will only search records in Open Service Requests and not records in Pending Closure Reason, Pending FSP Inactive Status, Pending FSP Enrollment Status, or Enrolled FSP Clients.
- Create** – click on this button to create a new SRTS record
- Search Referrals** – this takes you to a search to locate list of records in the entire SRTS system for clients
- Help** – access the User Manual, MCP Contacts, Provider Directory, and Release Notes here
- SRTS: Service Requests Initiated By This Provider** – displays all records initiated by the selected program
- Search field for Service Requests Initiated By This Provider - search by *Lastname, *Firstname, Client ID, Potential Client ID, or Date of Birth. Use the asterisk (*) wildcard at the beginning of your search for a more thorough (expanded) search of records.

13. List of all records initiated by your site/program. By default, the records are sorted in descending order by Date and Time of Request, with the newest record on top.

How to Create a New SRTS Service Request

From the Service Request List view, click **+ Create**



Service Request Tracking System

Search Referrals | Help ▾

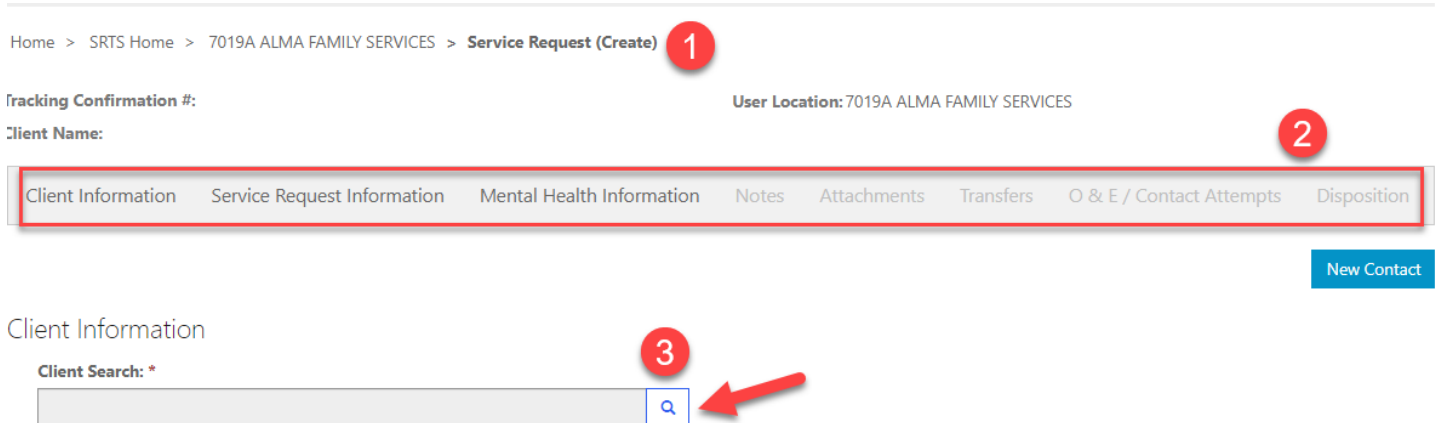
Home > 190DA PENNY LANE CENTERS-SATELLITE IX > Service Request List

SRTS: Open Service Requests ▾

Tracking # / Client Lookup 🔍 **+ Create**

Tracking Confirmation #:	Client Lookup	Client ID	Date of Birth	Age at the Time of Referral	Referral Category	Outpatient Type	FSP Type	Date and Time of Request ↑	SR Current Location Name	Provider Name Initiating Request
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You will arrive at the page where you will begin creating the new record.



Home > SRTS Home > 7019A ALMA FAMILY SERVICES > **Service Request (Create)** 1

Tracking Confirmation #: User Location: 7019A ALMA FAMILY SERVICES

Client Name: 2

Client Information | Service Request Information | Mental Health Information | Notes | Attachments | Transfers | O & E / Contact Attempts | Disposition

New Contact

Client Information

Client Search: * 3

🔍

1. The breadcrumb trail shows that you are in **Service Request (Create)**
2. These “tabs” will highlight which section of the record you are in. In this image, it shows that you are in the **Client Information** tab.
3. Client Search - always search for the client before creating a new contact to see if they already exist in the system. If the client is in the system, their demographics information will populate when you select their name.

Client Information

The first thing you need to do is perform a client search to see if the client is already in the system.

From the **Client Information** tab, click on the **Client Search** magnifying glass to take you to the **Lookup records** window.

The screenshot shows the 'Lookup records' window. At the top, there is a search box containing '*Smith' and a magnifying glass icon. A tooltip above the search box reads: 'To search on partial text, use the asterisk (*) wildcard character.' Below the search box is a table with the following columns: Full Name (with a checkmark and an upward arrow), Client ID, Potential Client ID, Date of Birth, Social Security Number, and DMH Contact Type. The table contains several rows, with the fourth row selected and its checkbox checked. Below the table is a pagination bar with numbers 1 through 8, and a 'Select' button. At the bottom right, there are three buttons: 'Select', 'Cancel', and 'Remove value'. A close button (X) is in the top right corner.

Full Name ↑	Client ID	Potential Client ID	Date of Birth	Social Security Number	DMH Contact Type
<input type="checkbox"/>					Potential Client
<input type="checkbox"/>					Potential Client
<input type="checkbox"/>					IBHIS Client
<input checked="" type="checkbox"/>					IBHIS Client
<input type="checkbox"/>					IBHIS Client
<input type="checkbox"/>					IBHIS Client
<input type="checkbox"/>					IBHIS Client

From the **Lookup records** window, perform the following:

1. Click into the Search box to perform a search by: First, Last or Full Name, Client ID, Potential Client ID, Date of Birth, or Social Security Number.
Tip: Use an asterisk (*) wildcard before the name or partial name to expand your search (ex. *Katy or *Kat)
2. Click on the magnifying glass or hit Enter on your keyboard
3. If the client is in the system, select the desired client in the checkbox
4. Click **Select** to load the existing client's information
5. If the client does not appear in the search results, click the **X** on the upper right corner to exit out of the search

If the client does not appear in the client search, you will need to create a new Potential Client by clicking **New Contact**.

Home > SRTS Home > 7019A ALMA FAMILY SERVICES > Service Request (Create)

Tracking Confirmation #:

User Location: 7019A ALMA FAMILY SERVICES

Client Name:

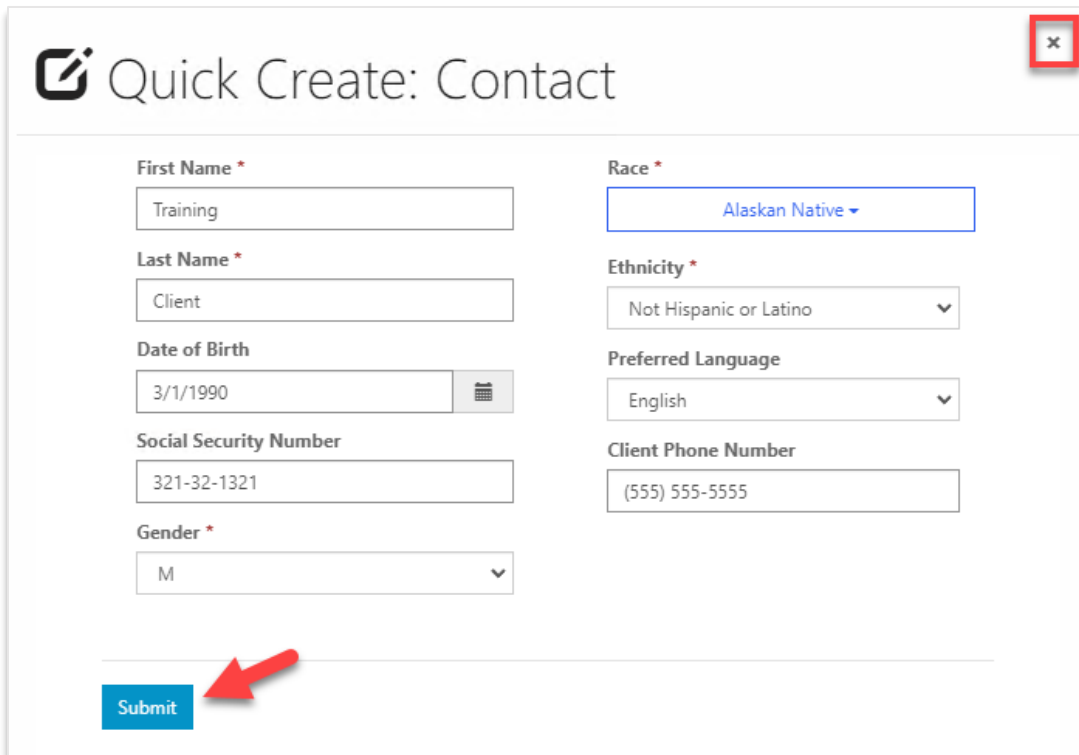
Client Information Service Request Information Mental Health Information Notes Attachments Transfers O & E / Contact Attempts Disposition

 **New Contact**

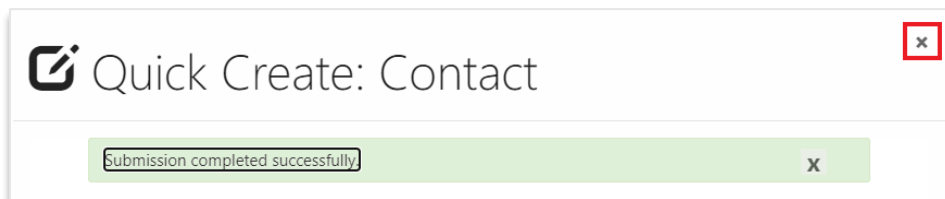
Client Information

Client Search: *

The **Quick Create: Contact** form will display. Fill in all required fields identified with an asterisk *. Though the other fields are not required, it is encouraged that you fill out as much of it as you can, especially the **Date of Birth** if you have it. This is helpful for providers to quickly know their age and to better serve the client if their services are age specific. It also differentiates clients with the same name. Click **Submit** when you have completed the form and wait for it to register. To cancel out of creating a new Potential Client, click on the top right **X** to exit the form.



When the New Contact (client) has been created, a confirmation message will appear.



Note: Click on the top right **X** to close the window.

Search for the new Potential Client you just created from the **Client Information** tab. Click on the **Client Search** magnifying glass, again.


Home > 19C8A SSG PROJECT 180 SOLA > Service Request List > Service Request (Create)

Tracking Confirmation #: _____ User Location: 19C8A SSG PROJECT 180 SOLA

Client Name: _____

Client Information | Service Request Information | Mental Health Information | Notes | Attachments | Transfers | Disposition

Client Information New Contact

Client Search: * 

From the Lookup records window:

1. Click into the Search box to type the name of the client you just created
Tip: Use an asterisk (*) wildcard before the name or partial name to expand your search (ex. *Katy or *Kat) Click on the magnifying glass or hit Enter on your keyboard
2. Select the client by clicking in the checkbox next to the name
3. Click “Select”

Lookup records

To search on partial text, use the asterisk (*) wildcard character.

*Training

Full Name ↑	Client ID	Potential Client ID	Date of Birth	Social Security Number	DMH Contact Type
<input checked="" type="checkbox"/> Client, Training		PC000057	3/1/1990	321-32-1321	Potential Client

Select Cancel Remove value

The SRTS record will populate the client’s information, including your associated location under **User Location**. Other fields like the Tracking Confirmation # and Client Name will not populate until you have completed the required fields and click “Save and Next” under the Mental Health Information tab.

Tracking Confirmation #:

User Location: 7019A ALMA FAMILY SERVICES

Client Name:

Client Information Service Request Information Mental Health Information Notes Attachments Transfers O & E / Contact Attempts Disposition

New Contact

Client Information

Client Search: *

AAABarns, James x q

Client ID

4284567

Gender

Select

Date of Birth

3/9/1917

Address 1: Street 1

Potential Client ID

Ethnicity

Select

Preferred Language

Select

Address 1: Street 2

First Name *

James

Race

Home Phone

8185551223

Address 1: City

Last Name *

AAABarns

Cell Phone

8186545211

Address 1: State/Province

Address 1: ZIP/Postal Code

Contact Information for this Request

Fill out this section to indicate contact information for the request. If the client’s or client’s representative’s current phone number is different from what is listed when you found the client in the client search, this is a good place to enter it. This is not intended to collect referring party information. This is the number where the client or representative can be reached for this service request. Requester/Referring Party information is different from this and will be collected under the “Service Request Information” tab.

Optional fields:

- Contact Name
- Contact Phone Number
- Contact Preferred Language
- Relationship to Client
- Legal Guardian Name
- Legal Guardian Phone
- Legal Guardian Preferred Language

Contact Information for this Request

Contact Name

Legal Guardian Name

Contact Phone Number

Provide a telephone number

Legal Guardian Phone

Provide a telephone number

Contact Preferred Language

Legal Guardian Preferred Language

Relationship to Client

All Service Requests for Selected Client

This section lists all the SRTS service requests created for the client since SRTS 2.0 launched. It includes both open (no disposition) and closed (disposition entered) requests for you to reference for care coordination. Note that the client can have multiple open requests at any given time.

All Service Requests for Selected Client

Tracking Confirmation #:	Client Lookup	Client ID	Date of Birth	Referral Category	Outpatient Type	FSP Type	Date and Time of Request	SR Current Location Name	Provider Name Initiating Request	Disposition
001730	Client, Training		3/1/1990	General Outpatient			3/22/2022 9:28 AM	19BYA MHA PALMDALE ADULT INTEGRATED SRVS	190DA PENNY LANE CENTERS-SATELLITE IX	Assessment appointment given
001705	Client, Training		3/1/1990	FSP		Adult FSP	3/16/2022 8:38 AM	19C8A SSG PROJECT 180 SOLA	19C8A SSG PROJECT 180 SOLA	

Next

Click **Next** or the **Service Request Information** tab towards the top of the page to proceed with completing the service request.

Service Request Information

Service Request Information

SR Current Location #

7019A

SR Current Location Name

7019A ALMA FAMILY SERVICES

Provider # Initiating Request

7019A

Provider Name Initiating Request

7019A ALMA FAMILY SERVICES

Staff Initiating Request *

Abel Rosales

Referral Category *

Select

SB317

DHS/ODR-DREAM

Outpatient Type

FSP Type *

Select

Request Type *

Select

Insurance Status *

Select

Date and Time of Request *

M/D/YYYY h:mm A

Requester/Referring Party

Referring Party Role (i.e. who sent referral) *

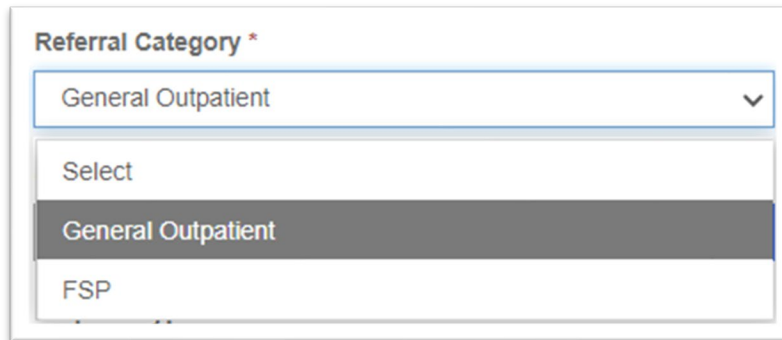
Select

These grayed out pre-populated fields cannot be modified:

- SR Current Location #
- SR Current Location Name
- Provider # Initiating Request
- Provider Name Initiating Request

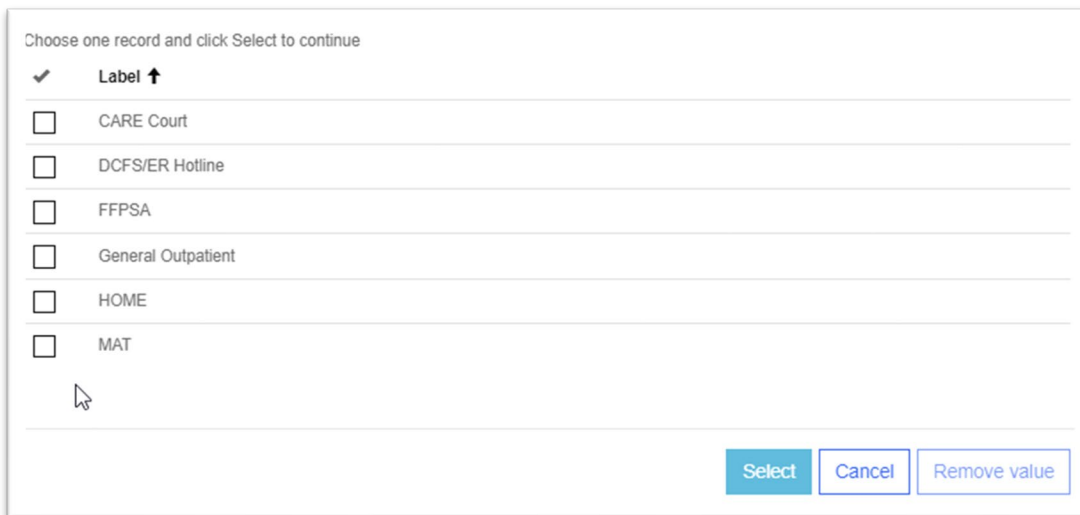
Required fields are identified with an asterisk*:

- Staff Initiating Request* (pre-populated but can be modified)
- Referral Category*



The screenshot shows a dropdown menu titled "Referral Category *". The current selection is "General Outpatient". The dropdown is open, showing a list of options: "Select", "General Outpatient", and "FSP". The "General Outpatient" option is highlighted in a dark grey bar.

- Outpatient Type (If Referral Category = General Outpatient*)

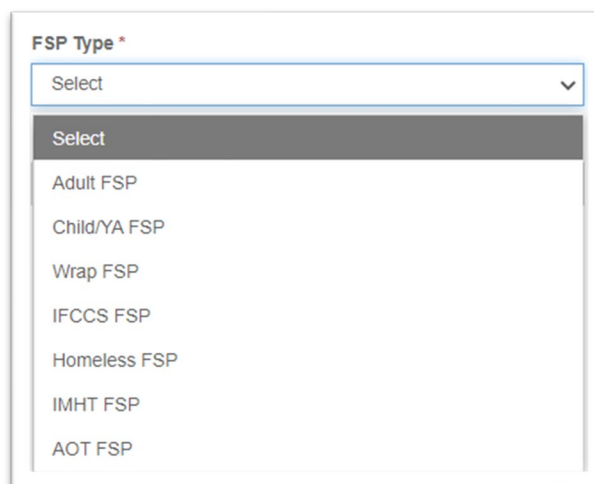


The screenshot shows a form titled "Choose one record and click Select to continue". It features a table with a header "Label ↑" and a checkmark icon. The table lists several options with checkboxes:

✓	Label ↑
<input type="checkbox"/>	CARE Court
<input type="checkbox"/>	DCFS/ER Hotline
<input type="checkbox"/>	FFPSA
<input type="checkbox"/>	General Outpatient
<input type="checkbox"/>	HOME
<input type="checkbox"/>	MAT

At the bottom right of the form, there are three buttons: "Select", "Cancel", and "Remove value".

- FSP Type (If Referral Category = General Outpatient*)



The screenshot shows a dropdown menu titled "FSP Type *". The current selection is "Select". The dropdown is open, showing a list of options: "Select", "Adult FSP", "Child/YA FSP", "Wrap FSP", "IFCCS FSP", "Homeless FSP", "IMHT FSP", and "AOT FSP". The "Select" option is highlighted in a dark grey bar.

- Request Type

Request Type *

Walk-In ▼

Select

Call

Walk-In

In writing

Other

- SB317

SB317

- DHS/ODR-DREAM

DHS/ODR-DREAM

- Insurance Status

Insurance Status *

Select ▼

Select

Indigent

Medi-Cal

Medi-Medi

Medicare

Private Insurance

Private + Medi-Cal

Private + Medicare

Private + Medi-Cal + Medicare

Unknown

- MCP - This field is only available and required if Insurance Status = Medi-Cal, Medi-Medi, Private + Medi-Cal, or Private + Medi-Cal + Medicare.

1. Select the hour glass icon
2. Scroll through the list to search and select a Managed Care Plan
3. Click the Select button

Choose one record and click Select to continue

✓ Name	Created On
<input type="checkbox"/> HEALTH NET MHN	3/7/2024 4:50 PM
<input type="checkbox"/> BLUE SHIELD OF CALIFORNIA, PROMISE HEALTH PLAN (CARE FIRST) - LA CARE	3/7/2024 4:50 PM
<input type="checkbox"/> CARELON - LA CARE	3/7/2024 4:50 PM
<input type="checkbox"/> KAISER - Antelope Valley Psychiatry – Lancaster, Palmdale	3/7/2024 4:50 PM
<input type="checkbox"/> KAISER - Covina Baldwin Park Psychiatry - San Gabriel Valley, West Covina	3/7/2024 4:50 PM
<input type="checkbox"/> KAISER - Woodland Hills Psychiatry - San Fernando Valley (west), Thousand Oaks, Simi Valley	3/7/2024 4:50 PM
<input type="checkbox"/> KAISER - South Bay Psychiatry	3/7/2024 4:50 PM

< 1 2 >

Select Cancel Remove value

- Medi-Cal CIN - This field is only available if Insurance Status = Medi-Cal, Medi-Medi, Private + Medi-Cal, or Private + Medi-Cal + Medicare

- Date and Time of Request* (Time defaults to when you entered into the field but can be changed. It is important to ensure the time is correct for urgent requests that require attention within 48 hours, as addressed in the next field.)

Requester/Referring Party

Fields for **Referring Party Role** will vary depending on selected choice. Required fields are identified with an asterisk*.

Requester/Referring Party

Referring Party Role (i.e. who sent referral) *

Select▼

If you select:

- **APS**
- **DCFS**
- **DHS Office of Diversion and Reentry**
- **DPSS**
- **Mental Health Provider**
- **Probation/Law Enforcement**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Referring Facility/Site School
- Is the client/potential client aware of referral?

If you select: **Collateral/Family Member**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Type of Role (in relation to the client)
- Is the client/potential client aware of referral?

If you select: **Court, Emergency Room, Health Provider, or School**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Referring Facility/Site School*
- Is the client/potential client aware of referral?

If you select: **Inpatient Facility**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Is the client/potential client aware of referral?

If you select: **Managed Care Plan**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Managed Care Plan*
- Screener/Transition of Care
- Is the client/potential client aware of referral?

If you select: **Interim Housing Provider, Metro Outreach Worker, or Street Outreach Worker**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Referring Facility/Site School
- HMIS #* (Note: If HMIS # Unavailable/Unknown is selected, then the HMIS # field is set to optional)
- HMIS # Unavailable/Unknown
- Is the client/potential client aware of referral?

If you select: **Other**

The fields are:

- Last Name*
- First Name*
- Contact Number
- Type of Role* (relationship to the client)
- Is the client/potential client aware of referral?

If you select: **Self (Client/Individual)**

The field is:

- Contact Number

Click **Next** or the **Mental Health Information** tab

Mental Health Information

Required fields will vary depending on selected choice. Required fields are identified with an asterisk *.

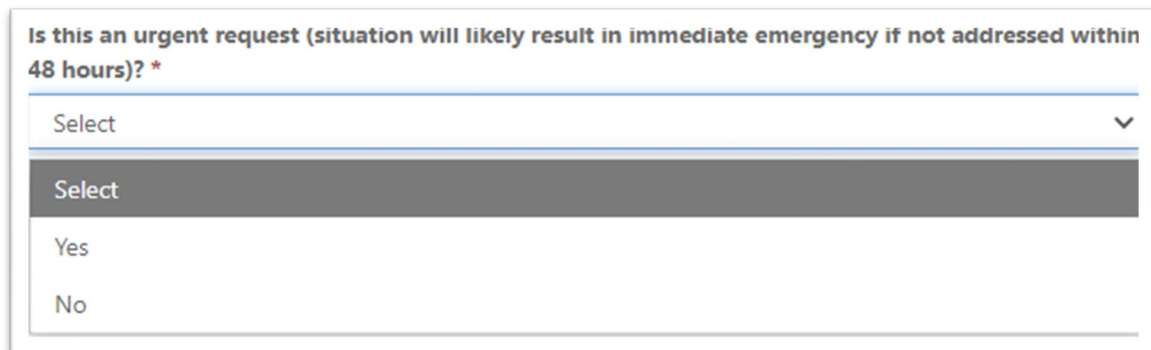
Age at the Time of Referral* (If the client's date of birth is provided, then the system automatically calculates the age at the time of the referral and sets the field to read-only. If the client's date of birth is not provided, then this field is set to required)

Age at the Time of Referral

61

Age at the Time of Referral

Is this an urgent request* (situation will likely result in immediate emergency if not addressed within 48 hours)?



Is this an urgent request (situation will likely result in immediate emergency if not addressed within 48 hours)? *

Select

Select

Yes

No

Can you tell me the reason you are seeking mental health services today? * – Open text field for you to describe why services are being requested for the client.

Can you tell me the reason you are seeking mental health services today? *

Are you currently receiving mental health treatment?*

Are you currently receiving mental health treatment? *

Select

Select

Yes

No

Undetermined

If yes, where are you receiving those services? (Set to required if Yes is selected in the “Are you currently receiving mental health treatment?” field)

If yes, where are you receiving those services? *

Release From*

Release From *

Select

Select

Inpatient

Jail

Juvenile Justice

N/A


Actual/Expected Discharge/Release Date – Required on if **Inpatient, Jail, or Juvenile Justice** is selected in the Release From field

Actual/Expected Discharge/Release Date *

M/D/YYYY 

Psychotropic medications within the last 30 days?*

Psychotropic medications within the last 30 days? *

Select 

Select

Yes


No

Undetermined

Screening Tool

Screening Tool Status


Screening Tool Status

Not Required 

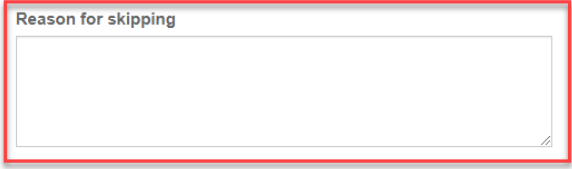
- **Not Required** – Based on the information entered for this service request, a screening tool is not required.
- **Incomplete** - Based on the information entered for this service request, a screening tool is required. Transfers and Disposition are disabled until the Screening Tool is completed. Click "Start Screening Tool" to begin.
- **Cancelled** - Skip Screener check box is selected and a screening tool is not required.
- **Complete** – Screening tool questions have been answered and submitted.

Click **Skip Screener** to cancel the screening tool and enter a reason for skipping

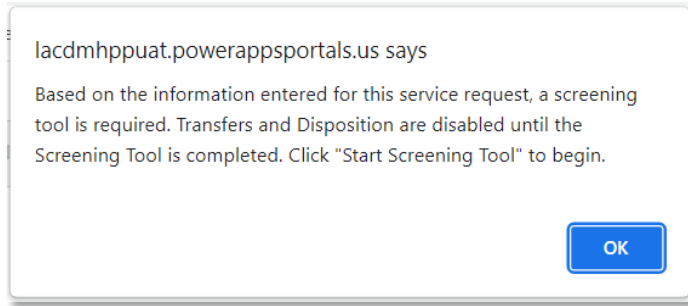
Skip Screener



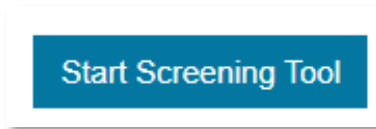
Reason for skipping



Click **Save and Next** and **OK**



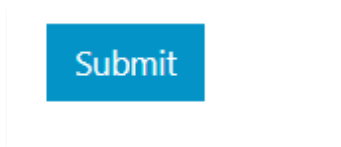
Click **Start Screening Tool** to begin screener questions for the specific age group



Click **Calculate Score** to find the Total Score of the questions answered



Click **Submit** to finalize and save the screener for the client



Note: A process will be executed to automatically generate a PDF and save a copy to the Attachments tab.

Click **X** to return to Client Information tab

Screening Tool Sub Grid

Click the drop-down menu and **click Edit** to view record of the saved screening tool for the client

Created On ↑	Created By	Modified On	Modified By	Score	
3/9/2023 2:03 PM	[Redacted]	3/17/2023 1:39 PM	[Redacted]	12	▼ Edit

Previous Next

Click **Next** to continue with the following tabs:

- **Notes**
- **Attachments**
- **Transfers**
- **O & E / Contact Attempts**
- **Disposition**

Note: It may take little while for the next page to load. After the page loads in the **Service Request (Edit)** view, the **Tracking Confirmation #** and the **Client Name** will display at the top of the record. The **Notes, Attachments, Transfers,** and **Disposition** tabs will also be activated. The **O & E / Contact Attempts** tab will be activated when the Referral Category = FSP and a Transfer record exists where the Transfer Reason = Preauthorized for FSP Services or Preauthorized for FSP Transfer. Alternatively, if the Referral Category = Outpatient and the Screening Tool Status does not equal Required, then the O & E / Contact Attempts tab will be activated.

Tracking Confirmation #: 001283 User Location: 7019AALMA FAMILY SERVICES
Client Name: AAAHaynes, Larry

Client Information Service Request Information Mental Health Information **Notes** Attachments Transfers O & E / Contact Attempts Disposition

Client Information

Client Search: *

Notes

Notes are not required to complete a service request but if you would like to attach one or your workflow requires you to attach a note, follow these steps:

Click on the **Notes** tab, then click **New**

Client Information Service Request Information Mental Health Information **Notes** Attachments Transfers O & E / Contact Attempts Disposition

Notes



Note ID ↓	Notes	Entered By	Date and Time Entered
-----------	-------	------------	-----------------------

There are no records to display.

Enter your notes into to the field and click **Submit** to attach your note.
To cancel out of attaching a note, click on the top right **X** to exit the form.
You can attach multiple notes by repeating these steps.

✎ Create
✕

Notes *

Enter your notes here

Entered By

Mychi Davis

Submit

↖

After you've saved your note, you will be directed to the Notes overview where you will find the note you've created.

Client Information Service Request Information Mental Health Information Notes Attachments Transfers O & E / Contact Attempts Disposition

Notes New

Note ID ↓	Notes	Entered By	Date and Time Entered	
N-001030	Enter your notes here	Abel Rosales	11/25/2024 2:14 PM	⌵



Previous
Next

How to Modify or Delete Notes

If the record is sitting at your location, you have the ability to modify or delete a note that you created but not another user's notes. From the **Notes** tab, locate the note you want to edit. Click on the **Note ID** in blue or the dropdown button on the right and click **Edit**.



Notes

New

Note ID ↓	Notes	Entered By	Date and Time Entered	
N-001030	Enter your notes here	Abel Rosales	11/25/2024 2:14 PM	 

Previous Next

Modify your note in the text field and click **Submit**. If you'd like to delete your note, check off **Delete Note?** and click **Submit**.

 View details 

Note ID
N-001337

Notes *

You can modify your notes.


Entered By
Mychi Davis

Date and Time Entered
3/22/2022 12:05 PM

Modified By

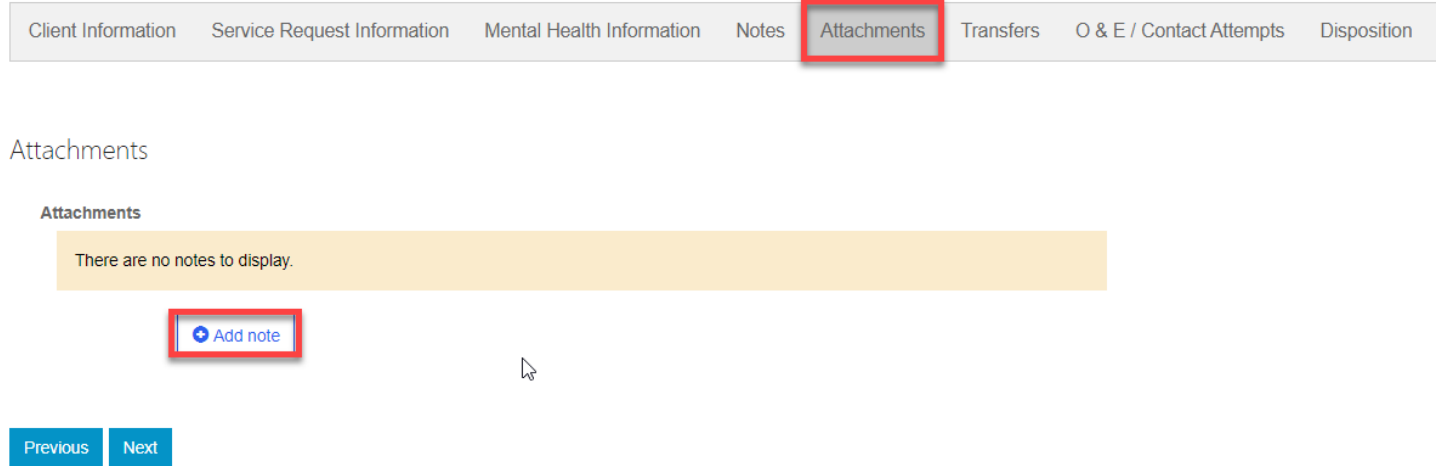
Date and Time Modified
3/22/2022 1:36 PM

Delete Note?

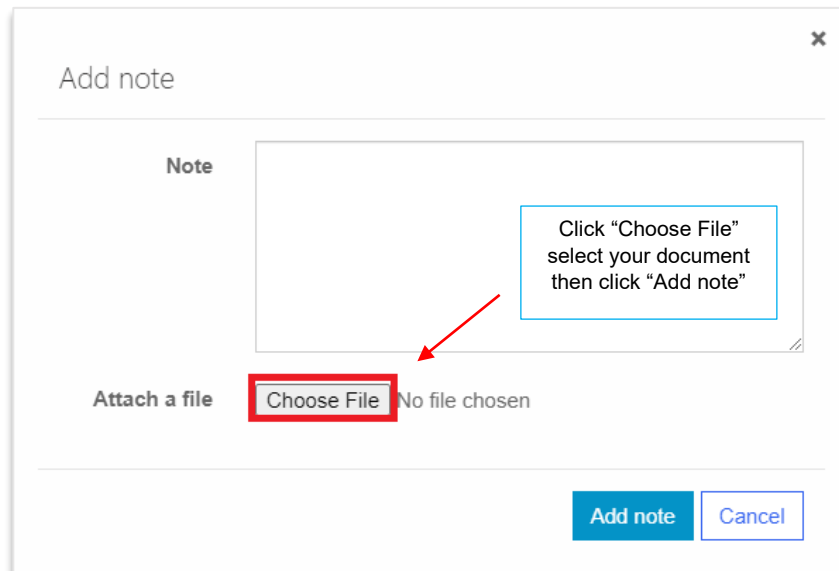


Attachments

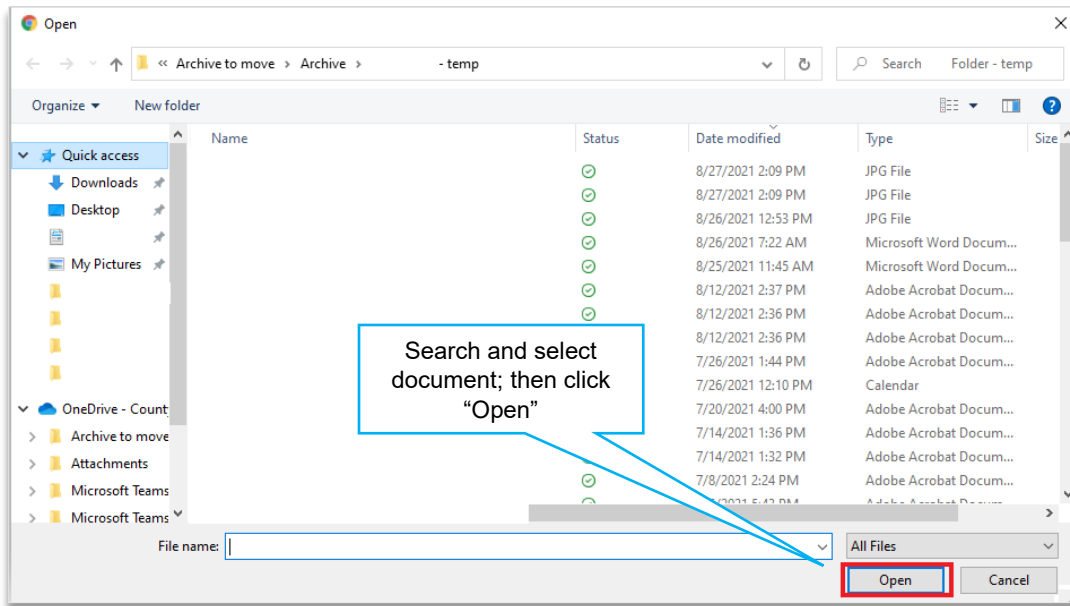
To add an attachment, click on Next at the bottom of the Notes tab or click on the Attachments tab. Click on **“+Add note”**



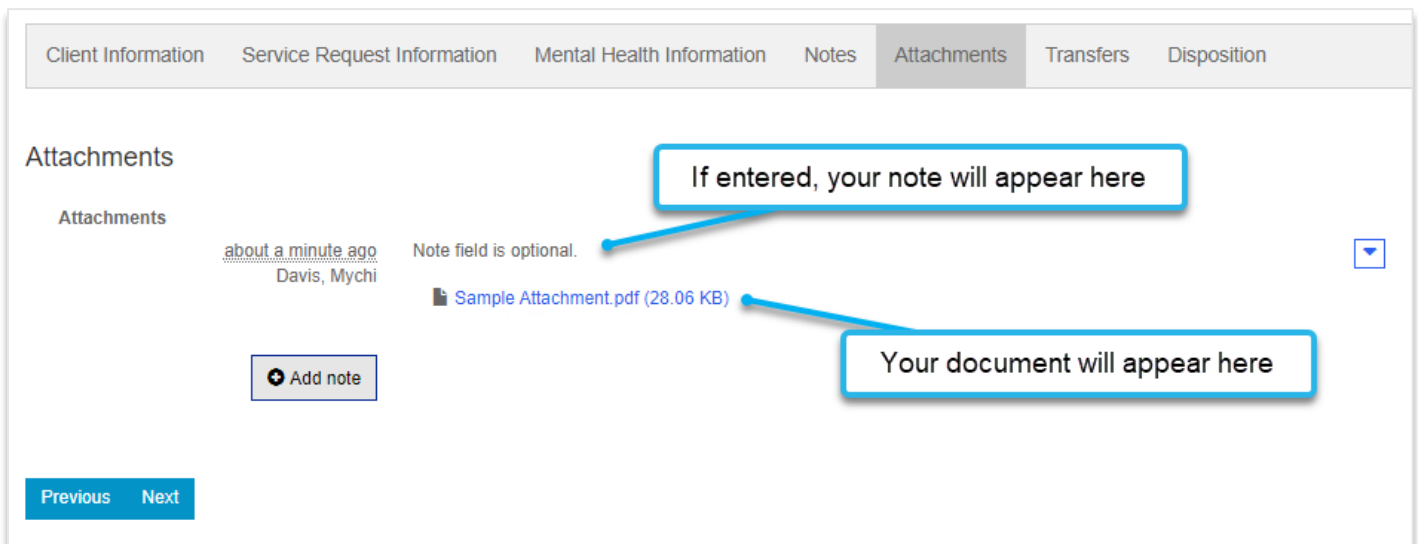
Enter a note, if desired; it is an optional field. Then click on **“Choose File”** to search for the document.



Search for the document (i.e., pdf, jpeg, .doc, etc.), select it, and click **“Open”**



The attachment will appear on the **Attachments** page.



The application allows one attachment at a time.

Repeat these steps to add multiple attachments.

How to Edit Attachments

If the record is sitting at your location, you have the ability to modify both the **“Note”** section and switch out the document you attached to the record but not another user’s note and attachment.

From the **Attachments** tab, select the dropdown button next to the document you want to replace and click **Edit**.

Tracking Confirmation #: 301457 User Location: ML KING-AUGUSTUS HAWKINS PSYCHIATRIC HOSP
 Client Name: Generate ID, Potential

Client Information Service Request Information Mental Health Information Notes **Attachments** Transfers Disposition

Attachments

Attachments

less than a minute ago
Elsa Belloso

flower field river.jpg (453.21 KB)

✎ Add note

You will be required to enter a note into the **“Note”** field in order to update the attachment.

✕

Edit note

* Note

Must enter note in order to update the attachment

Attach a file SAMPLE AT ...AINING.pdf

Select the new attachment from **“Choose File”**, click **“Open”** and then **“Update note”** to replace the attachment. Your modifications will replace the original attachment and notes for that attachment. The date and time stamp will reflect the original stamp.

How to Delete Attachments

From the **Attachments** tab, select the dropdown button next to the document you want to deleted and click **Delete**

Tracking Confirmation #: 001400 User Location: 190DA PENNY LANE CENTERS-SATELLITE IX
 Client Name: 123, Test

Client Information Service Request Information Mental Health Information Notes **Attachments** Transfers Disposition

Attachments

Attachments

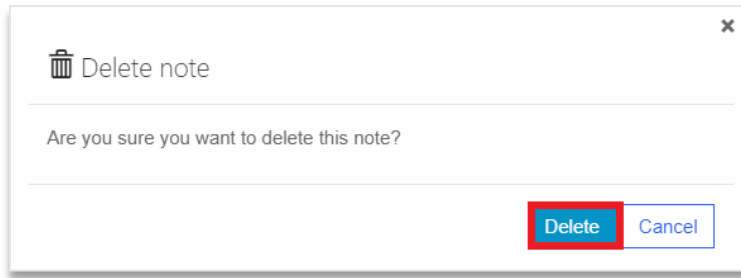
31 minutes ago
Davis, Mychi

replaced attachment

SAMPLE ATTACHMENT FOR SRTS TRAINING.pdf (180.64 KB)

✎ Edit
✎ Delete

Pop-up message to confirm deletion will appear, click **Delete** or **Cancel** to abort the deletion.



Transfers

Click on **Next** on the bottom of the **Attachments** tab or click on the **Transfers** tab (*go to **Disposition** tab, if not transferring the record*).

To create a transfer, click on “**New**”.

Home > SRTS Home > ML KING-AUGUSTUS HAWKINS PSYCHIATRIC HOSP > Service Request (Edit)

Tracking Confirmation #: 301457 User Location: ML KING-AUGUSTUS HAWKINS PSYCHIATRIC HOSP

Client Name: Generate ID, Potential

Client Information Service Request Information Mental Health Information Notes Attachments **Transfers** Disposition

Transfers

New

Transfer ID ↓	Transfer Date ↓	Date Entered	From Location Name	From Staff	To Location Name	Reason	Comments
There are no records to display.							

Previous Next

From the Create Transfer form, the following are *required fields:

- To Location Number
- Reason

The system will auto-populate:

- From Location Number
- From Location Name
- From Staff
- To Location Name – auto-populates when the To Location Number is selected

Optional field: Comments

Create

Transfer

From Location Number
7019A

From Location Name *
7019A ALMA FAMILY SERVICES

From Staff *
Jennie Ko

To Location Number *

To Location Name *

Reason *

Comments

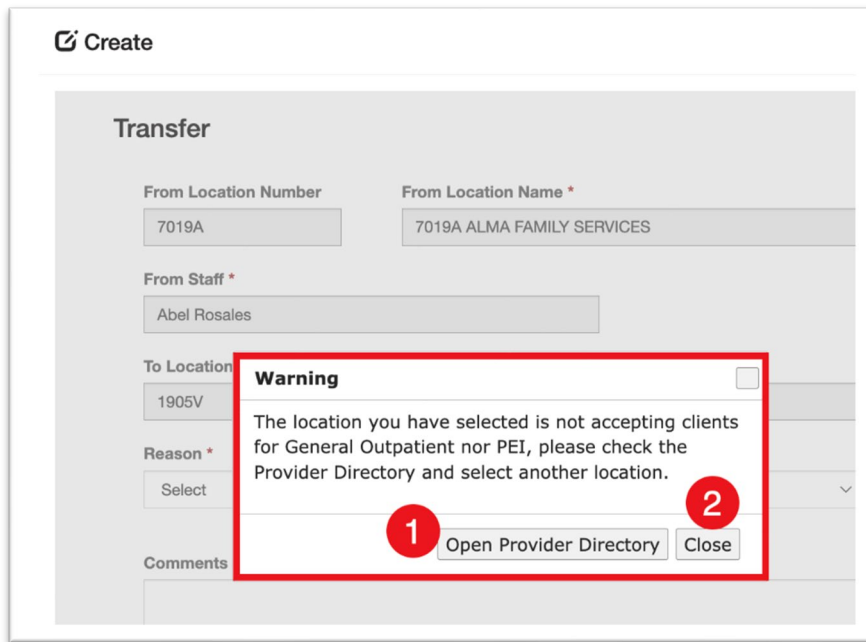
Tip: When performing a search in the **To Location Number** field, click on the magnifying glass, then use an asterisk (*) at the beginning of your search to expand your Program Name or Program Number search (ex., *Penny or *19).

Check the Program you want to transfer the record to and click “Select” to populate the **To Location Number** and **To Location Name** fields.

Lookup records

<input checked="" type="checkbox"/>	Program Code ↑	Program Name
<input type="checkbox"/>	190AA	190AA PENNY LANE CENTERS-SATELLITE VII
<input checked="" type="checkbox"/>	190DA	190DA PENNY LANE CENTERS-SATELLITE IX
<input type="checkbox"/>	190EA	190EA PENNY LANE CENTERS-SATELLITE X

Upon selecting the Program, the system will verify whether the selected program is accepting new clients. If not, then the system will display the following message where you have two available options:



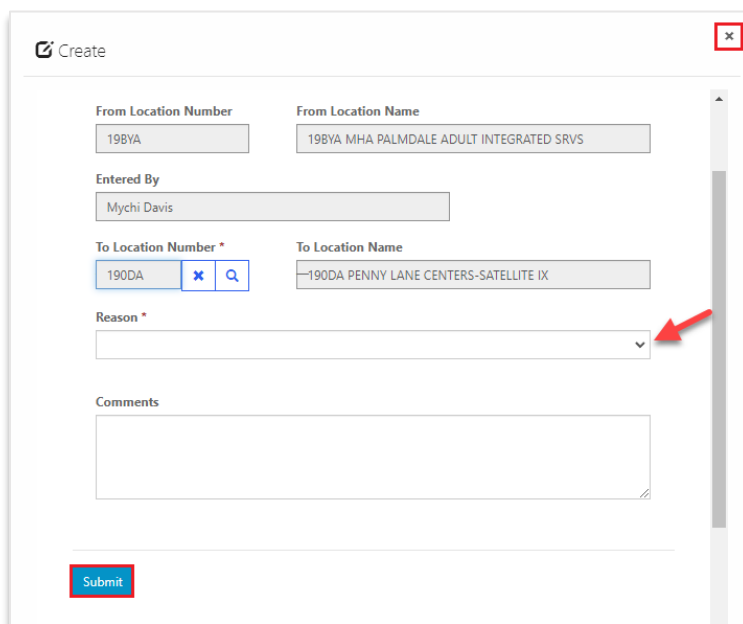
1. Selecting the Open Provider Directory button will redirect you to the DMH Provider Directory web page where you can conduct a search for a Program that is accepting new clients.
2. By selecting the Close button, you are able to select a new Program. Otherwise, you are confirming that the selected Program is indeed accepting new clients, therefore, proceeding with the transfer request.

Select the 'Reason' from the dropdown menu and enter comments in the 'Comments' field if desired.

Click "Submit" to transfer the record and be routed to the Transfers main page.

Note: once you click "Submit" to transfer the record, you will not be able to edit the record because it no longer resides at your location.

To cancel out of the transfer screen, click on the top right X to exit the form.



Note: Wait for the confirmation page to load. It can take up to 15 minutes for the record to sync.

Transfer Email Notification

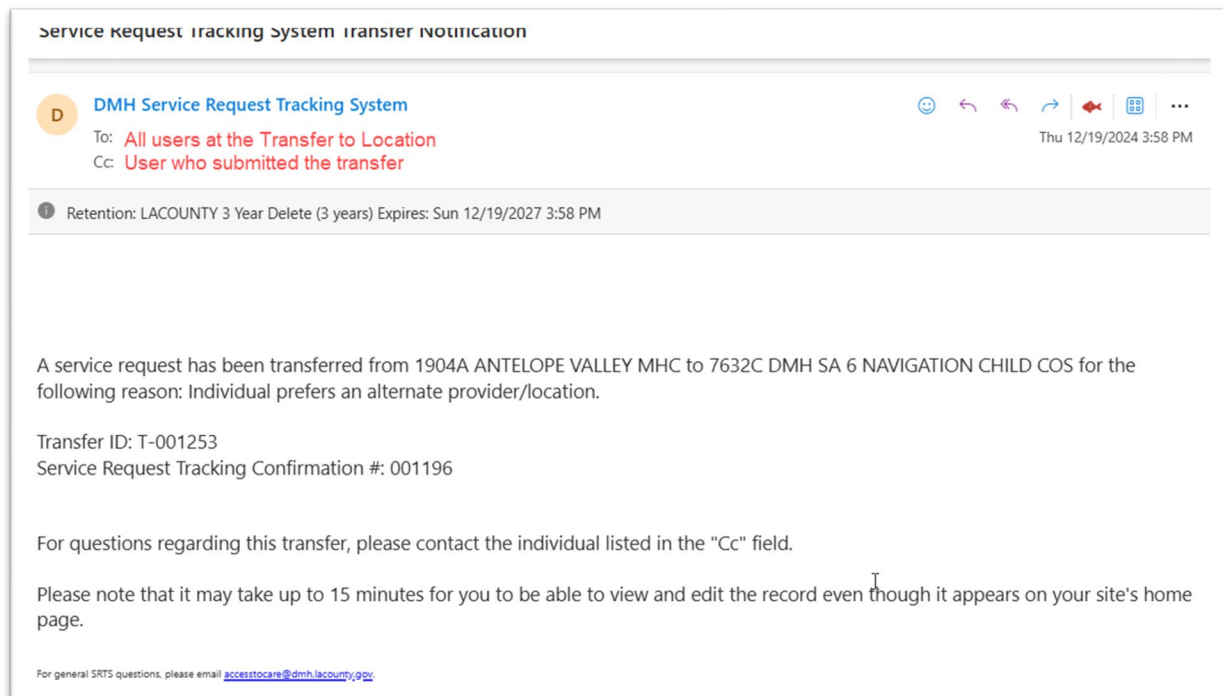
Service Request Tracking System Transfer Notification

A system generated transfer email notification from “DMH Dynamics Notifications” will be sent automatically to the associated Provider (Program) users. The user who submitted the transfer will also receive a copy of the email notification, identified in the Cc: field of the email.

The email notification will contain important information regarding the request. It will identify where the transfer was made from along with the reason why it was sent to your location. It will also contain the Transfer ID and the Tracking Confirmation # for reference. It is recommended that you keep these emails for future reference should you need to refer back to them or for contact information.

The system generated email will be sent by **DMH Service Request Tracking System**.

Example Email:



O & E / Contact Attempts


Click on **Next** on the bottom of the **Transfers** tab or click on the **O & E / Contact Attempts** tab.

To document an outreach and engagement or contact attempt, click on “**Create**”.

Client Information Service Request Information Mental Health Information Notes Attachments Transfers **O & E / Contact Attempts** Disposition


Outreach and Engagement

When documenting the attempts:
 Select 'Outreach and Engagement' if individual may not yet be ready to receive mental health services.
 Select 'Appointment Scheduling' if you are attempting to contact the individual to offer an appointment.


 [Create](#)

Purpose	Contact Date/Time ↓	Method of Contact	Contact made?	Contact Detail	Created On	Owner
There are no records to display.						

[Previous](#) [Next](#)

 **Create**

Purpose *

Contact Date/Time *
 

Method of Contact *

Contact made? *

Contact Detail

[Submit](#)

From the Create O & E form, the following are *required fields:

- Purpose
- Contact Date/Time
- Method of Contact
- Contact made?

Optional field: Contact Details

Click "Submit" to transfer the record and be routed to the Transfers main page.

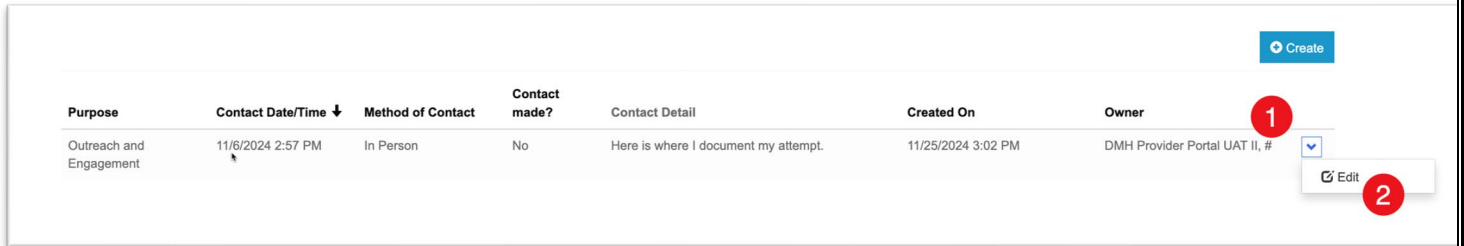
To cancel out of the O & E screen, click on the top right X to exit the form.

How to Edit O & E / Contact Attempts Records

From the **O & E / Contact Attempts** tab,

1. Select the dropdown button next to the document you want to edit.
2. Select Edit
3. Make the necessary updates on the form and select Submit to save the changes and to be redirected to the main form.

To cancel out of the O & E screen, click on the top right **X** to exit the form.



Purpose	Contact Date/Time ↓	Method of Contact	Contact made?	Contact Detail	Created On	Owner
Outreach and Engagement	11/6/2024 2:57 PM	In Person	No	Here is where I document my attempt.	11/25/2024 3:02 PM	DMH Provider Portal UAT II, #

Disposition

Click on the Disposition tab, then select the disposition from the dropdown menu.

Once you select a disposition, the system will auto-populate the following fields:

- Entered By
- Date and Time Entered
- Modified By
- Date and Time Modified



Disposition

Disposition

- Already receiving appropriate MH services
- Appointment given
- 911 Law Enforcement Response
- Individual/collateral declined services
- Initiated outreach and engagement
- Other
- Referral source withdrew request for linkage
- Referred back to private insurance
- Referred to other type of agency
- Request cancelled; alternative request in process
- Screened and referred to MCP
- Unable to contact individual/collateral
- Untimely appointment at this site, referral declined

To display **Closure Reason**, select any of the following dispositions:

- Appointment given
- Untimely appointment at this site, referral declined

*Required fields will vary depending on selected disposition.

Disposition

Disposition
Appointment given

Entered By
Jennie Ko

Date and Time Entered
3/30/2023 9:35 AM

Modified By
Jennie Ko

Date and Time Modified
3/30/2023 9:35 AM

Appointment - Practitioner *

Practitioner Name

Appointment Date and Time *

Was an earlier appointment offered?

For example: If Appointment given is selected, Closure Reason will display.

Closure Reason

Individual accepted appointment date and attended appointment

Individual accepted appointment date but did not attend appointment

Individual canceled appointment

Staff canceled appointment

Closure Reason options:

- Individual accepted appointment date and attended appointment
- Individual accepted appointment date but did not attend appointment
- Individual canceled appointment
- Staff canceled appointment

Closure Reason

Individual accepted appointment date and attended appointment

Individual accepted appointment date but did not attend appointment

IBHIS Client is required if "Individual accepted appointment date and attend appointment" is selected.

IBHIS Client *

If these appointments are for FSP, additional fields will be asked when a Closure Reason is entered.

If **Yes** is selected for **Did the client enroll in FSP?**, **Special Program Enrollment Date** is required.

Closure Reason

IBHIS Client *

Did the client enroll in FSP?

Medication Appointment Information

To display the **Medication Appointment Information** section, the answer to “Psychotropic medication within the last 30 days?” under the Mental Health Information tab must be “Yes”, and the disposition must be one with an appointment given: Appointment given or Untimely appointment give at this site, referral declined.

‘If medication appears to be a need’ options:

Medication Appointment Information

If medication appears to be a need:



If “**Med Eval Appt. Given (This site)**” is selected then the following are *required fields:

- Medication Appointment – Practitioner
- Medication Appointment Provider
- Medication Appointment – Date and Time

Medication Appointment Information

If medication appears to be a need:

Medication Appointment - Practitioner *

Medication Appointment Provider *

Medication Appointment - Date and Time *

Was an earlier appointment offered?

‘Was an earlier appointment offered?’ will be an optional field.

Click “Submit”, to submit the request, and you will be routed to the Service Request (Edit) page.

If “Interim Referral for Med Eval” is selected, then ‘Interim Medication Appointment – Program of Service’ will be a *required field.

The screenshot shows a form titled "Medication Appointment Information". At the top, a dropdown menu is set to "Interim Referral for Med Eval". Below this are several input fields: "Medication Appointment - Practitioner" and "Medication Appointment Provider" are search fields with magnifying glass icons; "Practitioner Name" and "Provider Name" are text input fields; "Medication Appointment - Date and Time" is a date and time picker; "Was an earlier appointment offered?" is a dropdown menu; and "Interim Medication Appointment – Program of Service *" is a search field. At the bottom left, there are "Previous" and "Submit" buttons.

Optional fields:

- Medication Appointment – Practitioner
- Medication Appointment – Date and Time
- Medication Appointment Provider
- Was an earlier appointment offered?

Click “Submit”, to submit the request, and you will be routed to the Service Request (Edit) page.

If “Med Needs TBD at Initial Assessment” is selected, no other options are available.

If “Other” is selected then, ‘Other Medication Disposition Information’ will be a *required field.

Click “Submit”, to submit the request, and you will be routed to the Service Request (Edit) page.

The screenshot shows the same form as above, but the dropdown menu is now set to "Other". The "Other Medication Disposition Information *" field is a large, empty text area. The "Previous" and "Submit" buttons are still present at the bottom left.

If no Disposition is selected and you click “Submit”, you will be routed to the Service Request (Edit) page.

FSP Authorization

Displays FSP Authorization Date, FSP Authorized Disenrollment Date, and FSP Authorized Inactive Status Date entered by FSP Administration.

FSP Authorization

FSP Authorization Date

FSP Authorized Disenrollment Date

FSP Authorized Inactive Status Date

Search Referrals

Search Referrals view houses all client records in the entire SRTS 2.0 system.

Click on Search Referrals near the top right side of the page. The “Search” field allows you to search for records within the **Search Referrals** view.

Service Request Tracking System Search Referrals | Help ▾

Home > SRTS Home > SRTS Search Referrals Use * to expand your search

Search

Search for the client’s *Firstname, *Lastname, ClientID, Potential Client ID, or Date of Birth. By default, the records are sorted in ascending order by Full Name. You can click at the top of each of the columns to sort in the other direction. The arrow indicates which column the records are sorted by and in which direction. Use the asterisk (*) wildcard at the beginning of your search for a more thorough (expanded) search of records.

Home > SRTS Home > SRTS Search Contact Referrals the asterisk (*) wildcard character.

Click column header to change sort order *Smith

Full Name ↑	Client ID	Potential Client ID	Date of Birth
			8/8/1979 <input type="button" value="▼"/>
			2/20/1969 <input type="button" value="▼"/>
			<input type="button" value="▼"/>
			<input type="button" value="▼"/>
			12/26/2009 <input type="button" value="▼"/>

Need Help?

If you need to correct a record or have technical questions regarding the SRTS application, please email AccessToCare@dmh.lacounty.gov.

For programming questions for specialized programs like FSP, please contact the appropriate FSP Administration.

For questions regarding Access to Care, please email NetworkAdequacy@dmh.lacounty.gov or AccessToCare@dmh.lacounty.gov.

Please refer to LACDMH Policy [302.07](#) and [302.14](#) for detailed information regarding the requirements for responding to initial requests for SMHS, universal screening, and time frames for scheduling appointments.

Link to [Access to Care Training](#)

Link to [Provider Directory](#)