

Closed Loop Referral Training



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Overview of Closed-Loop Referrals (CLR)

- CLR is a referral that is tracked, supported, monitored, and closed with a known outcome.
- Applies to Enhanced Care Management (ECM) and Community Supports (CS).
- Launch Date: July 1, 2025.
- Goal: Ensure members are connected to the right services, at the right time, through accountable referrals.



Why CLR Matters in Care Coordination

- Improves transparency and communication between SFHP, providers, and community-based organizations (CBOs).
- Enables the health plan to more closely monitor referrals and ensure services are delivered in a timely manner.
- Increases the percentage of referrals resulting in members receiving services.
- Supports compliance with DHCS' Population Health Management (PHM) framework.



SFHP Referral Process

SFHP manages ECM and CS referrals through a centralized intake process.

- Responsibilities include:
 - Approving referrals and assigning to providers.
 - Tracking referral progress and outcomes.
 - Sending referral status notifications to providers.



Servicing Provider Responsibilities

- Submit complete ECM/CS referrals using SFHP forms.
- Provide timely monthly updates in the Return Transmission File (RTF):
 - **Date_Member_Notified_of_Authorization**
 - **Date_Referring_Entity_Notified_of_Closure_Determination**
- Respond to referral inquiries within 1 business day.
- Submit all data by established monthly deadlines.



Updated Referral Form Fields

New Fields:

Referring Individual Name:

Referring Individual Phone #

Referring Individual Title:

Referring Individual Email Address:

Referring Organization Name:

Referring Organization NPI:

Referring Individual Name*:

Referring Individual Title*:

Referring Individual Phone Number*:

Referring Individual Email Address*:

Referring Individual's Relationship to Member* (Select one):

☐ Medical Officer ☐ Community Supports Provider ☐ Social Services Provider ☐ Other Please describe:

additional detail in Section 5 – Additional Comments.

Referring Organization Name*:

Referring Organization National Provider Identifier (NPI)*:



Step-by-Step: Electronic Referral & Intake Review

1. Referral submitted to SFHP by ECM/CS provider.
2. SFHP reviews and authorizes/denies.
3. Referring entity is notified.
4. SFHP reaches out to new servicing provider.
5. New servicing provider accepts/rejects referral.
6. Provider submits referral updates monthly via RTF.
7. Referral loop is closed when services begin or are resolved.
8. SFHP reports data to DHCS.



SFHP Updates to the Member Information File (MIF)

New Required Fields:

- **Date_Member_Notified_of_Authorization-**
- **Date_Referring_Entity_Notified_of_Closure_Determination**



Walkthrough of MIF Update (Servicing Provider)

Field Name	Field Description	Outbound Eligibility File to ECM/CS Provider	Inbound Enrollment from ECM/CS Provider	Field Type (Max Length)	Format/Valid Values
Date_Member_Notified_of_Authorization	Date Member was notified of the authorization decision.	N (Not Used)	R (Required)	Date (10)	MM/DD/YYYY
Date_Referring_Entity_Notified_of_Closure_Determination	Date referring entity was notified of referral loop closure.	S (Situational)	S (Situational)	Date (10)	MM/DD/YYYY



Common RTF Documentation Errors

Incorrect File Naming Format

Files must follow this strict format: **ECMEnrollTPCYYYYMMDD.txt**

- Deviations (like wrong TPC code or date format) will lead to file rejection. (e.g.= **ECMEnrollTPC2025/06/20.txt**).

Wrong Data Formats in Fields

- Dates must be in MM/DD/YYYY using digits only (e.g., 06/20/2025), not **6/20/25**, **2025-06-20**, or **06-20-2025**.

Updating SFHP Member Data via File (Prohibited)

- Providers should not use the RTF to correct member demographic or PCP information. That must be done through SFHP Customer Service.
- Providers must not add or remove members to the RTF list. If a provider has a question regarding a member please reach out to the SFHP ECM/CS team.



MIF Submission Timeline for Providers

- Providers deadlines for submitting MIFs:
 - ECM by the 5th of each month
 - CS by the 5th of the month
- SFHP must submit JSON files to DHCS by the 10th for the previous month data
- Key Actions:
 - Use updated templates with required fields
 - Ensure completeness and accuracy
 - Submit securely through SFTP



Future Implementation of FindHelp at SFHP

FindHelp is a HIPAA-compliant platform for social referrals and status tracking.

Why it matters:

- Streamlines ECM and CS referrals.
- Enables real-time referral tracking and loop closure.
- Reduces administrative burden and enhances provider visibility.

Planned Rollout: Q4 2025



DHCS Compliance & Audit Readiness

Effective Date: July 1, 2025

SFHP Go-Live Date: 09/01/2025

SFHP must submit CLR data monthly via JSON.

Audit Focus Areas:

- Referral timeliness and outcomes.
- Notification of referring entities and members.
- Data integrity and completeness.

Best Practices:

- Use current templates.
- Document and track referral activity.
- Respond to technical assistance needs proactively.



Thank you!

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Closed Loop Referral Overview

