



PO Box 601340
San Diego, CA 92160-1340
P: 877-824-8376
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www.optumsandiego.com

Dear TERM Provider:

Thank you for your commitment to becoming a TERM provider. Your role in the evaluation of parents and youth involved with Child and Family Well-Being (CFWB) and Juvenile Probation can offer valuable information to assist with case decision making to ensure appropriate services are in place that address safety and improve overall functioning.

Given the forensic nature of CFWB and Juvenile Probation evaluations, providers should ensure that the evaluation reports are factual, objective, and clearly written for the Courts. This document is an overview for TERM providers who conduct psychological evaluations for CFWB and Juvenile Probation and includes information relevant to TERM evaluations. The documents contained in this resource are for informational purposes and do not constitute legal/evaluative advice. Additional resources including the [TERM Provider Handbook](#) are available on the TERM Providers section of Optum's [website](#).

Please feel free to contact us at 877-824-8376, option 2 for any questions about TERM guidelines or processes. We also appreciate any ideas you may have to help us serve you better. Thank you for partnering with Optum TERM in serving the clients of the County of San Diego.

Respectfully,

Optum TERM Team



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TERM Psychological Evaluation Quality Assurance Checklist

- The Psychological Evaluation Quality Assurance checklist is a resource for providers to use to ensure that psychological evaluations follow TERM guidelines and contain all the required elements.



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TERM Psychological Evaluation Quality Assurance Checklist

- Report submitted by provider within required time-frame.
- Report adheres to the required Format and all required Elements are present
- Internal consistency within the documentation.
- Collateral sources of information have been consulted (e.g., background records, interviews with caregivers) or an explanation of the extenuating circumstances which precluded this is provided.
- Testing measures are appropriate for the client's population, consistent with the rationale for testing, and with established validity and reliability. At least one objective measure of personality/psychopathology/emotional and behavioral functioning is utilized (or an explanation of the extenuating circumstances which precluded this is provided).
- Test data is interpreted according to designated test publisher's manual and in keeping with professional standards.
- Diagnostic impressions and conclusions are supported by the evaluation data and background information. Alternate hypotheses are considered.
- Recommendations are appropriate, supported by the evaluation data, and within scope of licensure and role of a TERM provider.
- Referral questions are addressed with sufficient detail for the reader to follow the logic of the evaluator. The connection between data and opinions are made clear.
- Documentation of any mandated child abuse report is included, if applicable.
- Report documentation is written in impartial and unbiased language.
- Report is signed by provider.



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Psychological Evaluation Procedures

Resources are located on the [Optum TERM website](#)

- [Psychological Evaluation Procedures](#) is a resource which includes a non-exhaustive list of objective psychological evaluation measures. It can be found on Optum's [website](#) under the TERM Providers section in the 'CFWB/Probation Evaluations' tab. Please note, Optum TERM does not endorse nor approve specific measures.
- Providers are expected to be knowledgeable of and ensure that updated measures are being administered based on the referral needs and in consideration of the population being evaluated.

Child and Family Well-Being (CFWB) Psychological Evaluations

Resources are located on the [Optum TERM website](#)

- CFWB identifies the type of referral questions on the 04-178 referral form. A sample of the [04-178 Request for TERM-Appointed Evaluator](#) referral form is available on Optum's [website](#).
 - The 04-178 Request for TERM-Appointed Evaluator provides case specific information, focus of evaluation, CFWB contact information, demographic information for the client, Court dates, case background, and reason for referral.
 - Providers are expected to address all the referral questions.
 - Below are the different types of referral focus, which are located on the [Optum website](#):
 - **CFWB Youth Evaluations**
 - [Adoption Evaluation](#)
 - [Autism Spectrum Disorder Evaluations – Child/Youth](#)
 - [Diagnostic Clarification and Treatment Recommendations – Child/Youth](#)
 - [Emotional Damage Evaluation of a Child/Youth](#)
 - [Neuropsychological Evaluation – Child/Youth](#)
 - **CFWB Parent Evaluation**
 - [Diagnostic Clarification and Treatment Recommendations – Parent](#)
 - [Autism Spectrum Evaluations - Parent](#)
 - [Mental Disability Evaluation of a Parent \(FC 7827\)](#)
 - [Adoption Evaluation of Prospective Adoptive Parent](#)
 - [Neuropsychological Evaluation of Parent](#)
- Optum TERM requires a consistent and specific format for all evaluation reports; please review [The Format and Required Elements of a CFWB Psychological Evaluation](#). These templates represent the minimal requirements expected of CFWB reports.
- [Specialized Optum TERM Panel Evaluation](#) is a resource that outlines the minimum guidelines for specialized evaluations.

Use of Interns

**Please review Optum Intern Standards for specific guidelines*

- Prior to assigning the client to an intern, supervisors are responsible to assess whether the referral is appropriate for intern assignment and must be present during the clinical interview.
- Pre-license interns are not able to accept Medi-Cal cases, Highly Vulnerable Child(ren) Cases (HVC), 300 e/i/f, and Family Code 7827 (FC7827).
- Reports should include information as to who conducted portions of the assessment (clinical interview, measures, etc.).

Juvenile Probation Evaluations

Resources are located on the [Optum TERM website](#)

- San Diego County Juvenile Probation Evaluation Referral Process provides information as to how Probation handles an evaluation that is ordered by the Court.
- Probation TERM Evaluator Records Release Protocol reviews the Probation process of releasing records to evaluators.
- [Probation Psychological and Neuropsychological Evaluation Referral](#) form contains demographic information, including Probation contacts, due date of the report, date of Court Order, referral questions, and collaterals. Please pay close attention to the Court and due dates to ensure that the referral can be accommodated within the specified timeframe.
 - Please note that on occasion a specialized referral question may be requested, which will be indicated either in the Minute Order or Probation Psychological and Neuropsychological Evaluation Referral. It is the provider's responsibility to only accept referrals for which they have the approved specialty areas.
- [Specialized Optum TERM Panel Evaluations](#) is a resource that outlines the minimum guidelines for specialized evaluations.
- Optum TERM requires a consistent and specific format for all psychological and psychiatric evaluation reports to ensure standardized reporting of information and to assist the reader to efficiently obtain the information needed for case decision making. These templates have been approved by Juvenile Probation and represent the minimal requirements. It is expected that all providers will use this format and include all required elements in the reports. The templates below are located on the [Optum website](#):
 - [Format and Required Elements of a Probation Psychological Evaluation](#)
 - [Format and Required Elements of a Juvenile Mental Competency Evaluation](#)
 - [Format and Required Elements of a Juvenile Threat Assessment](#)

Use of Interns

**Please review Optum Intern Standards for specific guidelines*

- Prior to assigning the client to an intern, supervisors are responsible to assess whether the referral is appropriate for intern assignment and are required to discuss the intern assignment with the referring party.
- Supervisors are required to inform the client and/or attorney of the planned use of an intern a minimum of 3 days prior to the evaluation.
- Supervisors must be present during the clinical interview.
- Pre-license interns are not able to accept Mental Competency or School Threat Assessment evaluations.
- Reports should include information as to who conducted which portions of the assessment (clinical interview, measures, etc.).



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Juvenile Probation Evaluation Referral Process

Probation evaluators are selected on an unbiased, randomized basis. When the Court orders an evaluation, the Court clerk logs into the Optum TERM website and searches the database for Probation evaluators. The database allows for evaluators to be selected based upon an identified area of competence, such as school threat assessment, autism spectrum evaluations, competency to stand trial assessments, expertise with fire setting, or problematic sexual behaviors.

The Optum TERM database provides the Court clerk with the names of three (3) evaluators in a random rotation. For prejudicated cases, the minor's attorney then ranks these names and the rankings are placed in a minute order (a Court document that records what happened at the hearing). Upon receipt of the minute order, the Probation Officer (PO) calls the first name on the list and offers the referral. If the first evaluator does not respond within four (4) working hours, or declines the referral, the next evaluators are called in order and are asked to respond within four (4) working hours. Once an evaluator accepts, they should receive a referral form attached to a packet of information (i.e. minute order, court reports, previous evaluation/IEP if available within 1 year, etc.). For juvenile competence evaluation referrals, the referral questions are embedded in the minute order.

Additional Consideration

- ☞ If you have not received the client's background records, please follow up directly with the referring PO. Minor's defense counsel may also be able to assist with access to information such as IEPs.
- ☞ Optum TERM should be informed whenever a provider is temporarily unavailable to accept referrals so that the provider can be placed on "unavailable" status in the database and thereby temporarily taken out of the referral process. This will ensure that the Court receives names of evaluators who are available to accept a case.
- ☞ If there is a potential conflict of interest such as a prior therapeutic or professional relationship with the referred client or a client's family member, the referral should be declined. Therapeutic contact with clients following the evaluation is also discouraged.



Records Release Protocol for TERM Juvenile Probation Evaluations

(Updated September 2026)

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. Correctional Healthcare Partners (CHP) provides care to youth detained in the juvenile detention facilities. Records will be emailed from CHP directly. Records that shall be shared may include, if available:

- Mental Health Evaluation (for youth in custody >14 days)
- Psychiatric Evaluation
- Suicide Prevention Notes
- Psychiatry Progress Notes
- Behavioral Health Progress Notes
- Treatment Plan
- Special Protocol

If there are no contacts on the Client Roster Report or clinical records available from CHP, 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.

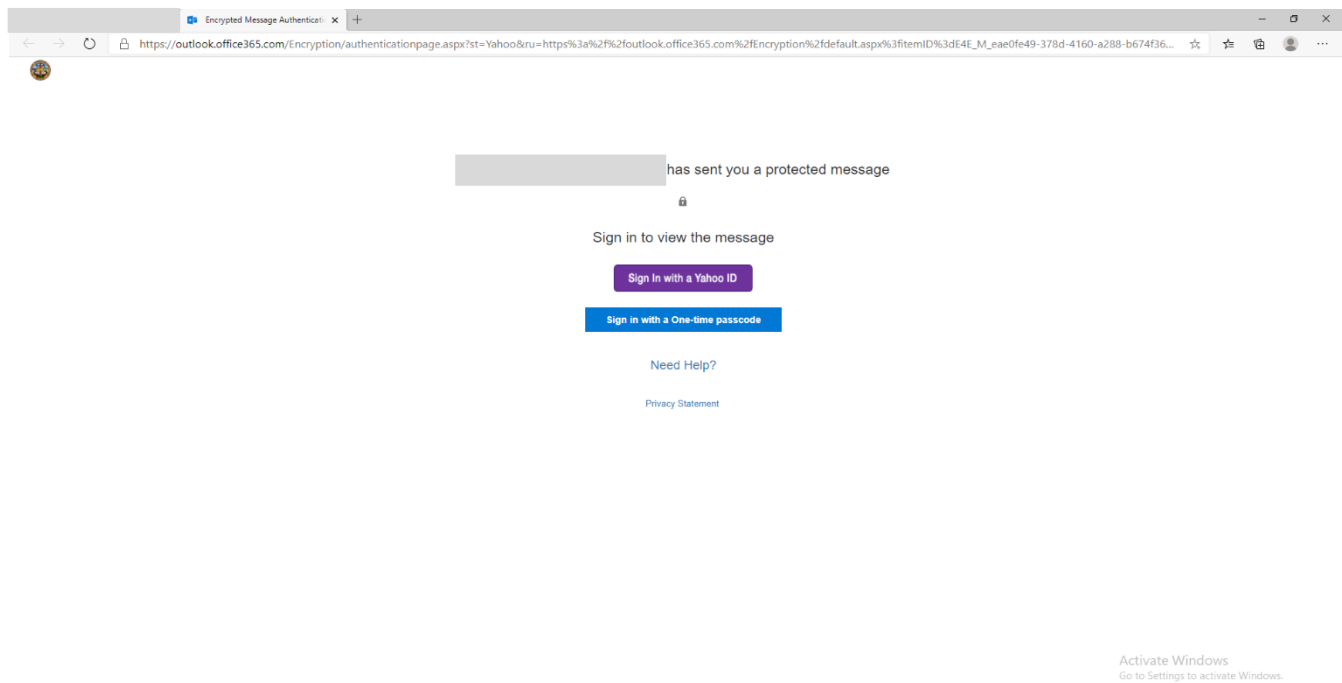
For Evaluator assistance please call the TERM Line:

1-877-824-8376, Option 2

***Steps to Review San Diego County Encrypted Email:**

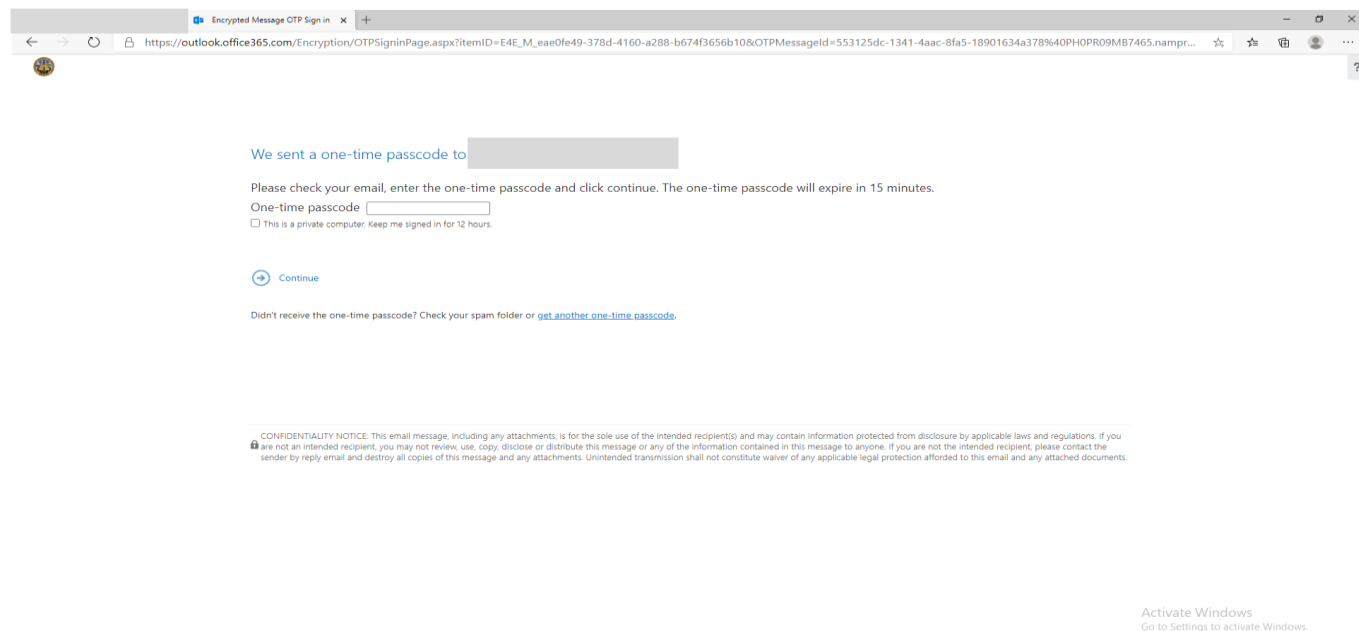
In your encrypted email, click on the "Read the Message" button

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





You will receive the message below in your Email:



Enter in the "One-Time" passcode field

Click on Continue

View your email and attachments.