



**BARBARA FERRER, Ph.D., M.P.H., M.Ed.**  
Director

**MUNTU DAVIS, M.D., M.P.H.**  
County Health Officer

**ANISH P. MAHAJAN, M.D., M.S., M.P.H.**  
Chief Deputy Director

**GARY TSAI, M.D.**  
Bureau Director  
Substance Abuse Prevention and Control Bureau  
1000 South Fremont Avenue, Building A-9 East, 3rd Floor, Box 34  
Alhambra, California 91803  
TEL (626) 299-4101 • FAX (626) 458-7637

[www.publichealth.lacounty.gov](http://www.publichealth.lacounty.gov)



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**SAPC INFORMATION NOTICE 25-11**

TO: Los Angeles County Substance Use Disorder  
Contracted Treatment Providers

FROM: Gary Tsai, M.D., Bureau Director *A7*  
Substance Abuse Prevention and Control Bureau

SUBJECT: **REQUIREMENTS FOR APPOINTMENT AND REFERRAL  
DISPOSITIONS**

In accordance with 42 Code of Federal Regulations (CFR) Part 438.206(c)(1) and Welfare and Institutions Code (WIC) section 14197 (d), counties are required to monitor, assess, and meet timely access to service standards. To meet these requirements and better monitor timely access of clients from first request to assessment appointment, including no shows and appointment follow-up, the Substance Abuse Prevention and Control Bureau (SAPC) is expanding its Referral Connection protocol. This Information Notice (IN) outlines these contractual requirements and offers guidance for documenting referrals and appointment dispositions.

**Referral Connection Form Requirements**

As outlined in [SAPC IN 22-13](#) and the current SAPC Provider Manual, **all** initial client encounters (e.g., walk-ins, request for service, external referrals, etc.) that occur directly at SAPC-contracted treatment provider agency sites, and not through Substance Abuse Service Helpline – SASH, Client Engagement and Navigation Services – CENS, and Connecting to Opportunities for Recovery and Engagement – CORE Centers, require the agency to screen the prospective clients and document attempts to schedule an appointment in the “*Referral Connections Form*” on Sage-EHR / PCNX. This is for both referrals made internally (within their agency) or externally (to another agency).

## Requirements for Documenting Initial Patient Appointments

While the “*Referral Connections Form*” and “*Service Connection Log*” (completed by SASH, CENS, and CORE Centers) provide information on initial requests for services (i.e., appointments), to be compliant with State regulations, SAPC requires additional information on the outcome of these appointments, such as no shows and attempts to follow up on missed appointments.

Therefore, effective September 1, 2025, SAPC treatment providers are required to complete a “*Appointment and Referral Disposition Log*” for all appointments resulting from initial client encounters.

### Appointment and Referral Disposition Form

The “*Appointment and Referral Disposition*” form is located on Sage-EHR / PCNX and is a short form that requires provider agencies to input data related to 1) whether the client showed to the appointment; 2) date the appointment was rescheduled; and 3) the outcome of the appointment.

Provider agencies must complete an “*Appointment and Referral Disposition*” form for all initial appointments **within three calendar (3) days** following the appointment date.

To support provider agencies in monitoring completion of the “*Appointment and Referral Disposition*” forms, information on referral identification and appointment dates will be prepopulated using data from both the “*Referral Connections Form*” and “*Service Connection Log*” and will be visible to providers via widgets. It will include summary information on scheduled appointments, including dates of appointments (and times if available), client names, dates of birth, gender (for validation purposes), and client’s preferred contact.

Additional guidance and resources for accessing and using the “*Referral Connection Form*”, “*Appointment and Referral Disposition*” form and widgets can be found on the SAPC Sage webpage: <http://ph.lacounty.gov/sapc/providers/sage>.

## Monitoring/Compliance

SAPC will monitor provider agency input into both the “*Referral Connections Form*” and “*Appointment and Referral Disposition*” form on a regular basis and follow up as needed to ensure compliance.

GT:am