
REFERRAL PROTOCOLS FOR ADDRESSING PUPIL BEHAVIORAL HEALTH CONCERNS

The Sage Oak Charter Schools (“SOCS” or the “Charter School”) Board of Directors (“Board”), at its regularly scheduled meeting, hereby adopts the following policy on referral protocols for addressing pupil behavioral health concerns in grades 7–12. This policy has been developed in consultation with school and community stakeholders and school-linked behavioral health professionals and establishes the adopted procedures relating to referrals to behavioral health professionals and support services.

Addressing the Needs of High-Risk Groups (EC Section 49428.2(b)(3))

SOCS recognizes the importance of ensuring equitable access to behavioral health supports for all students. This policy addresses the needs of high-risk pupil groups, which include but are not limited to the following:

- Pupils with disabilities, mental illness, or substance use disorders.
- Foster youth and youth placed in out-of-home settings.
- Homeless youth.
- Pupils experiencing bereavement or loss of a close family member or friend.
- Pupils for whom there is a concern due to behavioral health disorders, including common psychiatric conditions and substance use disorders such as opioid and alcohol abuse.
- Lesbian, gay, bisexual, transgender, or questioning pupils.

The Director of Student Services is responsible for coordinating implementation of these referral protocols, in collaboration with the Senior Director of Special Education (IEP/504), Foster Youth Liaison, Homeless Liaison, and Charter School administrators. Leadership may also identify additional pupil groups at local discretion if local data or partner input show increased behavioral health risks.

Student Privacy

SOCS recognizes and agrees to abide by federal and state student data privacy laws and regulations (including but not limited to the Family Educational Rights and Privacy Act (FERPA), EC Section 49073, et seq., etc.) with which SOCS must comply in connection with its policy on referral protocols for addressing pupil behavioral health concerns and in connection with implementation of its policy and protocols, including but not limited to any of subsets of its policy, such as those listed below.

Referral Protocols and Procedures

SOCS adopts the following referral protocols and procedures relating to referrals to behavioral health professionals and support services:

Needs Assessment

The Director of Student Services shall conduct an annual needs assessment to:

- Identify behavioral health trends;
- Review available resources; and
- Detect service gaps within the school community.

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Capacity Building

SOCS shall:

- Provide professional development on referral pathways and staff roles;
- Clarify responsibilities among certificated and classified staff; and
- Maintain partnerships with school-linked behavioral health professionals and community providers

Planning

The Director of Student Services shall:

- Define referral pathways for crisis and non-crisis concerns;
- Establish goals and assign responsible roles for each step in the referral process

Implementation

SOCS shall establish step-by-step procedures to:

- Initiate referrals;
- Document concerns;
- Notify parents/guardians consistent with law;
- Triage level of need;
- Link pupils to appropriate services; and
- Schedule follow-up checks.

Evaluation and Continuous Improvement

SOCS shall conduct an annual evaluation of referral protocols that includes:

- Data collection and analysis;
- Input from staff, families, and community stakeholders; and
- Targeted improvements based on results.

Training (EC Section 49428.2(b)(4), (c)-(e))

SOCS shall ensure that teachers of pupils in grades 7–12 receive training on pupil behavioral health. Training materials shall include:

- How to identify appropriate contacts for behavioral health evaluation, services, or both evaluation and services.
- When and how to refer pupils and their families to those services.
- Recognizing the signs and symptoms of youth behavioral health disorders.

Subject to EC Section 49428.2(d), SOCS shall certify, on or before July 1, 2029, to the CDE that 100 percent of its certificated employees and 40 percent of its classified employees who have direct contact with pupils in grades 7–12 have received youth behavioral health training at least once, in accordance with EC Section 49428.2(c)(1)–(5).

Authorization and Scope of Practice (EC Section 49428.2(b)(5))

In order to ensure that all school employees act only within the authorization or scope of their

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credential or license, SOCS shall:

- Provide training and guidance to staff clarifying their roles in the referral process and the limits of their credential or license.
- Direct employees to refer pupils to appropriately credentialed or licensed professionals when behavioral health concerns are identified.
- Maintain referral protocols that specify which staff positions are authorized to act at each stage of the referral process.
- Review job descriptions and assignments to confirm they align with credentialing and licensing requirements.
- Inform staff clearly that only licensed or credentialed professionals are permitted to diagnose or treat behavioral health conditions.

Consistent with EC sections 49428.1(b)(8) and 49428.2(b)(5), nothing in this policy shall be construed as authorizing or encouraging school employees to diagnose or treat youth behavioral health disorders unless they are specifically licensed and employed to do so.