

Clinical Documentation User Manual

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About this User Manual

This user manual is designed to provide a how-to guide of the features and functionality of SmartCare. It will outline how to complete each workflow in a step-by-step format with related screenshots that will make understanding how to complete each workflow easy. Through this guide, you will learn about SmartCare's comprehensive suite of tools and advanced technologies to enter client data securely and efficiently.

We hope that by following these instructions you will gain a better understanding of the capabilities of SmartCare so that you can start using the system right way with confidence.

Audience

This manual is intended for use by anyone who will use the SmartCare EHR to support Specialty Mental Health Services or Substance Use Disorder clinical documentation.

Computer Literacy Assumptions for Understanding this User Manual

- Ability to perform basic word processing such as typing and searching for documents in files
- Understands data entry techniques into electronic forms and documents
- Familiarity with running a windows operating system or other popular programs like Mac OS.
- Basic knowledge of how to use internet browsers like Microsoft Edge and Google Chrome

IT Support Requests:

Please call our Help Desk at: (916) 214-8348 or submit a live chat question to https://2023.calmhsa.org/

Note: Before beginning to use the same system, make sure you have a compatible internet browser like Microsoft Edge and Google Chrome. CalMHSA recommends Google Chrome for best user experience.

LMS Related Support:

Please email: moodle@calmhsa.org

Logging in to SmartCare

- 1. From the desktop, open your internet browser
- 2. Enter the SmartCare URL
- 3. Enter your username and password
- 4. Click Login

Usern	ame
*	MHClinician
Passw	vord
۵	
Ren	nember me LOGIN

First Time User Login Process

When you first login you will have to set up 3 security questions.

- 1. Click the drop-down menu next to each security question
- 2. Click to select the security question you want to use

Security Questions	
Security Question 1	
Answer	At what school did you complete your graduate studies?
Security Question 2	At what school did you complete your undergraduate studies? How much did you pay for your first car?
Answer	In what city did you first get married?
	In what city did you meet your spouse/significant other?

- 3. In the Answer field, type the answer to your chosen security question
- a. Repeat this for the remaining two questions
- 4. Click Save

Security Question 1	At what school did you complete your undergraduate studies?	\sim
Answer		
Security Question 2	In what city was your father born?	\checkmark
Answer	••••••	
Security Question 3	In what city did you first get married?	\checkmark
Answer		

Subsequent Logins

SmartCare uses multi-factor authentication, or MFA. This means that when you log in, you'll receive an email with a code that you'll need to enter. Your system administrator will set up how often this needs to happen.

Enter the Authenticatior	Nev sent to the Re	gistered Device.
Authentication Key		
Validate	Send Again	Cancel



Basic Navigation and Functionality

This section will cover basic SmartCare functionality, terminology, and navigation.

Home Screen

When you first login to SmartCare you will land on the Home Screen. You will have a home screen unique to your role to make it easier to navigate to the work that applies to you.

The Home Screen consist of 3 main components:

- A. The Work Area
- B. The Menu Bars
- C. The Search Bar

<u>⊨</u>		ashboard											© 0	Save
My Office	>	Tracking Widget 🥡						*	0	Assigned Docume	nt(s)			;
MC My Client Activities		Workgroup	All Workgroups		Assigned	Clinician, Robert	~ /		*		Notes	ISP As	sessment	Other
Client	>	Tracking Protocol	All Flags		O Tx Team Role		s v			Due Now	Q	0	Q	0
	<u> </u>	Flags Track	ed	Due	in 90-61 Days	Due in 60-31 Days	Due in 30 Days or Les	s Overdue		In Progress	55	0	1	<u>59</u>
Program	>	Assessment Needed			<u>0</u>	<u>0</u>	1	<u>11</u>		Due in 14	0	0	<u>_</u>	0
-	_	CalOMS			<u>0</u>	<u>0</u>	<u>0</u>	<u>3</u>		Co-Sign	1	_ 0		3
C SmartLinks		CANS due for this client			<u>0</u>	<u>0</u>	<u>0</u>	1		To-Sign	1	<u>0</u>	<u>0</u>	1
Inquiries		Client does not speak Eng	ish		<u>0</u>	<u>0</u>	<u>0</u>	1		Assigned	Q	Q	Q	0
Client Flags	0	CSI admission			<u>0</u>	Q	<u>0</u>	8						
My Documents	0	Staff Safety Concern			<u>0</u>	<u>0</u>	<u>0</u>	1						
		Suicidal Risk			<u>Q</u>	<u>0</u>	Q	<u>0</u>	-					
		UMDAP Due			0	0	0	2	1.					
		Appointments For Toda	ay		0	New Alert/Message	s							1
		Client Name/Description	Tim	e	Status	From	Received	Client	Subj	iect	Mess	age		
		Process Group	<u>10:0</u>	00 AM	Show	Admin, System	10/26/2022	Thompson, Toby	Cont	act Note: Contact da	<u>- Lef</u>	message to di	scuss Toby	
		Lunch	<u>12:0</u>	00 PM		Supervisor,	09/29/2022	Thompson, Toby	Adul	t Medi-Cal Screening	<u>I hav</u>	e issues		
		Paper Work	04:0	00 PM		Supervisor,	09/23/2022	Houdini, Harry	Adul	t Medi-Cal Screening	<u>HI, ti</u>	nis needs work	Learn to writ	te
						Staff, Access	08/24/2022	Young, Butters	Plea	se Contact	Hello	Please set ou	treach to clier	nt.Than
						Staff, Access		Anderson, Jan		tal Health Documents		Please open o		
						Supervisor,	08/23/2022	Thompson, Toby	Diag	nosis Document - Thom	<u>Hi, le</u>	t's discuss Tob	<u>y's situation,</u>	I wa
						Sullivan, Ke	08/21/2022	Jones, Ryan	Plea	se verify	Pleas	e ensure Ryan	's consents a	re update

Icons

The **Header**, pictured below, consists of several icons.

■ SmartCare

Q 🚖

🗳 🗳 🥲 ? Robert Clinician 🗸 🔱

The Icons and Functionality table below describes each icon.

-

	Icons and Functionality
=	The Menu icon will open and close the Navigation Filters bar
SmartCare	Clicking on the SmartCare icon will bring you back to your Home Page
Q	The Search icon will allow you to quickly search for screens and list pages within SmartCare
*	The Favorite icon will allow you to search for screens and list pages that you have save in your favorites
-	The Person Search icon will allow you to search for a client by their name or ID number
50	The Unsaved Changes icon will display a list of screens that you made changes to but navigated away from before saving
4 ⁰	The Notification icon will display a list of system notifications. The number that appears in the icon correlates to the number of notifications you have
3	The History icon will open a window that displays the last 13 patients and QuickLinks you have accessed in your current session
?	The Help icon , will take you to the SmartCare Online Help webpage
Ċ	The Logout icon will log you out of SmartCare

Preferences

In order to access your user preferences, follow the steps below:

- 1. From the Header, **click the drop-down menu after your name** in the upper right-hand side.
- 2. A menu will open, select Preferences from the menu options



Note: Your preferences window will open, here you will be able to update your password, contact information, security questions, push notifications, etc.

Widgets

SmartCare has widgets that are multi-functional and interactive. They allow you to see and act on information most relevant to your role and daily tasks. The widget will appear on your Home Screen when you first login.

Workgroup	All Workgroups	Assigned	Clinician, Rob	oert V		-		Notes	ISP	Assessment	Other	r
Fracking Protocol	All Flags	🔿 Tx Team Ro	All Assigned				Due Now	0	0	0	0	
Flags Tracke	d	Due in 90-61 Days	Due in 60-31 Days	Due in 30 Days or Less	Overdue		In Progress	Q 55	0 0		<u>0</u> 59	
Assessiment Needed		Q	Q	1	<u>11</u>		Due in 14	0	0		<u></u>	
CalOMS		<u>0</u>	Q	Q	3		Co-Sign	1	0	0	3	
CANS due for this client		Q	Q	Q	1		To-Sign	1	0		1	
Client does not speak English	1	Q	Q	<u>0</u>	1	-	Assigned	- 0	<u>_</u>		±	
pointments For Today		ŕ	C New Alert/Messag	ges								
. ,	Time	Status	C New Alert/Messag	ges Received Clie	nt	Subject	-	Messa				
Client Name/Description				Received Clie		,	-					
Client Name/Description Process Group	Time	Status	From	Received Clic 09/29/2022 The	mpson, Toby	Adult M	t	<u>I have</u>	age Lissues	ork. Learn to write	2	
Dipointments For Today Client Name/Description Process Group Lunch Paper Work	Time 10:00 AM	Status	From Supervisor,	Received Clie 09/29/2022 The 09/23/2022 Hot	mpson, Toby Idini, Harry	Adult M	t ledi-Cal Screening ledi-Cal Screening	<u>I have</u> <u>HI, th</u>	age F <u>issues</u> is needs we	ork. Learn to write		
Client Name/Description Process Group Lunch	Time <u>10:00 AM</u> <u>12:00 PM</u>	Status	From Supervisor, Supervisor,	Received Clie 09/29/2022 The 09/23/2022 Hot 08/24/2022 You	mpson, Toby Idini, Harry ng, Butters	Adult M Adult M Please	t ledi-Cal Screening ledi-Cal Screening	<u>I have</u> <u>HI, th</u> Hello,	age Lissues is needs wi Please set		t.Than	
Client Name/Description Process Group Lunch	Time <u>10:00 AM</u> <u>12:00 PM</u>	Status	From Supervisor, Supervisor, Staff, Access	Received Clie 09/29/2022 The 09/23/2022 Hou 08/24/2022 You 08/24/2022 Ance	mpson, Toby Idini, Harry ng, Butters Ierson, Jan	Adult M Adult M Please Mental	t ledi-Cal Screening ledi-Cal Screening Contact	<u>I have</u> <u>HI, th</u> <u>Hello,</u> <u>Hello</u> ,	age Lissues is needs wi Please set Please ope	outreach to clien	t.Than Mental	

The Tracking Widget

The Tracking widget is a tool that shows you any documents or tasks that you need to complete. You can scroll down on the widget to view all tasks and documents that are due. Each document or task is hyperlinked to take you to the "To Do List" so you can complete it. The Tracking widget will default to you as the user, but you can switch to view your items by *Workgroup* or by *Treatment Team Role* if you are in a supervisor.

Tasks are grouped into 4 categories for easy prioritizing,

- Due in 90-61 Days
- Due in 60-31 Days
- Due in 30 Days or Less
- Overdue

If a document doesn't have a due date, but hasn't been completed, it will show

Note: Clicking on the hyperlinked number will take you only to the tasks or documents that are due within that time category. Clicking on the task or document hyperlinked name will take you to all tasks in that category. To use the Tracking widget, follow the steps below:

- 1. Click the hyperlinked name of the task or document.
 - a. You can also click the hyperlinked number.

Workgroup	All Workgroups \sim	Assigned	Clinician, Robert	\sim	
Fracking Protocol	All Flags	🔿 Tx Team Role			
Flags Tracked	Due in	90-61 Days	Due in 60-31 Days	Due in 30 Days or Less	Overdue
Assessment Needed		<u>0</u>	<u>0</u>	<u>1</u>	11
CalOMS 1		<u>0</u>	<u>0</u>	<u>0</u>	<u>3</u> a
CANS due for this client		<u>0</u>	<u>0</u>	<u>0</u>	1
Client does not speak English		<u>0</u>	Q	<u>0</u>	1

2. For Supervisors, you can change between Workgroup, Assigned, and Tx Team Role by clicking on the radio button to the corresponding field.

🔾 Workgroup		Assigned	Clinician, Robert	\checkmark	
Tracking Protocol	All Flags	🔿 Tx Team Role	All Assigned Roles	\sim	
Flags Track	ked (Due in 90-61 Days	Due in 60-31 Days	Due in 30 Days or Less	Overdue
Assessment Needed		<u>0</u>	<u>0</u>	<u>1</u>	<u>11</u>
<u>CalOMS</u>		<u>0</u>	<u>0</u>	<u>0</u>	<u>3</u>
CANS due for this client		<u>0</u>	<u>0</u>	<u>0</u>	1
Client does not speak Engli	sh	<u>0</u>	<u>0</u>	0	1

The Appointments For Today Widget

1. This widget allows you to see your daily schedule at a glance. This includes non-client time, such as meetings and time off, as well as client appointments. Clicking on the link will take you to that appointment.

pointments For Today	2	
Client Name/Description	Time	Status
Another, Test(Ther	<u>09:30 AM</u>	Scheduled 📋 ASAM
Lunch	<u>12:00 PM</u>	
Process Group	02:00 PM	Show
Paper Work 1	04:00 PM	

2. For client service appointments, this link will take you to the service details, where you can quickly write a note.

Effective 01/16/202:	Status To Do		Author Clinician	n, Robert 01/11/20	023	00		Sign	
Service Note B	illing Diagnosis Warnings I	Disposit	ion						
Service									
Status	Scheduled	~		Start Date	01/16/2023	i -			
Program	Outpatient MH Adult	~		Start Time	9:30 AM				
Procedure	Therapeutic Behavioral Services	~	Modifier	Travel Time		Minutes			
Location	Community Mental Health Center	~		Face to Face Time		Minutes			
Clinician	Clinician, Robert			Documentation Time		Minutes			
Mode Of Delivery	~			Total Duration	45	Minutes			
Cancel Reason		\sim		Attending			~		
				Referring			~		
Evidence Based Practice	s	~							
Custom Fields									
Interpreter Servic	e								

3. For non-client appointments, like meetings, this link will take you to the Staff Calendar.



The Caseload Widget

1. This widget allows you to easily see your caseload. Clicking on any of the links will take you to the My Caseload list page.

Caseload				3
	Curr	ent	Not Seen in 3 Mos	Last Year
Primary		<u>106</u>	<u>91</u>	0
Total		<u>108</u>	<u>91</u>	0

2. Just like any list page, you can use the filters at the top of the page to narrow the results as needed. Depending on the link you clicked from your dashboard, some filters may already be in place.

My Office >	My Caseload (:	106)										☆	*	*
Client >	Primary Clients Registered and In Tre-	 ✓ Seen in X days atmi ✓ All Note/Icon 			Last Name Begins taff Clinician, F		_	ll Programs onal Hierarchy	~		A		Filter	i
Program >	Client 🛆	Phone	Axis V	Last DOS	Last Seen by Me	Primary	Episode Status	Staff	Roles	Note	es/Ico		2	
SmartLinks	Anna Anna Linto			12/30/2022	12/30/2022	Yes		Clinician, Robert	Program Assignmer	Ê,	ASAN	\$		
	Autor Int Last	Management Proves		01/11/2023	01/04/2023	Yes		Clinician, Robert	Program Assignmer	Ê	¢۶	ASAM		
	And States, States of States					Yes		Clinician, Robert		ATP	Ê	G		
	Annual State (Sec.)			11/18/2022	11/18/2022	Yes	Registered	Clinician, Robert		Ê,	ASAM	Ø		
	frame James (1996)	TOTAL COLUMN		01/07/2023	12/02/2022	Yes	Registered	Clinician, Robert	Primary Clinician, Pr	1	i	0	SAM	Q
	Annual Annual Collect			12/19/2022		Yes		Clinician, Robert	Program Assignmer	Ê				
	free lands (1917)	111 49 199 19		09/22/2022		Yes	Registered	Clinician, Robert		Ø	i	•	V A	s/
	from loss (1997)					Yes	Registered	Clinician, Robert	Program Assignmer	Ê	•	i	V A	s/
	Bernel, Sect. Later					Yes		Clinician, Robert	Program Assignmer	Ê,	ASAM	/ATP	0	C
	farm, loss 1070	111 118 (mill 1m)		12/20/2022		Yes	Registered	Clinician, Robert		Ø	i	•	∞ ∧	SI
	ferrer fatter (22					Yes		Clinician, Robert		ATP	Ô	07	ISAM	Ŷ
	farmer for 1000			09/23/2022		Yes		Clinician, Robert		Ô,	ASAM	\$		
	Receiptor, Reserves					Yes		Clinician, Robert						
	feet loss 1000	Proc. 882 (1970) (194		12/23/2022		Yes	Registered	Clinician, Robert		Ê	•	i	Ø	
	Res. Inc. Line			12/13/2022		Yes		Clinician, Robert		ATP	Ê	G	0	Ť
	Street Long Total			01/10/2023		Yes		Clinician, Robert		Ê				
				12/23/2022		Yes	Registered	Clinician, Robert		-	land 1	i	V A	

The SmartView

1. When you have the client open, click on the SmartView icon in the upper right corner of the screen.

🔍 ★ 💄 Training, Manual (1	239) 🏧 📋 🕻	9 + ×		🖴 🇳 🄊 ? Ro	bert Clinician 👻 Ů
Client Dashboard				Θ	🗹 <table-cell-rows> 🖬 Save 🔉</table-cell-rows>
Upcoming Appointments(0) No data to display	All C	Current Medication(0) No data to display	All C	Treatment Team Role No Information	All 2
Client Tracking			<u>aii</u> 2	Documents To Do(382)	C
MH Outpatient			~	CSI Standalone 2022-04-01 Collection	<u>To Do</u>

- 2. This opens up the SmartView side panel. This will remain open while you navigate the client's chart. The SmartView widgets include links that will take you to the related screen.
 - a. To hide this, click the X in the upper-right.
 - b. To refresh the information on the SmartView widgets, click the Refresh icon.

lient Dashboard				72			9 🗹 C		Save
Upcoming Appointments(3	1) <u>All</u> 📿	Current Med	lication(0)	-	SmartView			Ŕ	3)
PsychoTherapy on 01/23/20 with Clinician, Robert	23 at 08:00 AM		No data to disp	olay	ВМІ				
Alcohol and/or drug services: by a clinician on 01/23/2023 Clinician, SUD	group counseling at 11:00 AM with							-	-
Alcohol and/or drug services; by a clinician on 01/25/2023 Clinician, SUD					BM	20	Weigh	τ	-
Alcohol and/or drug services; by a clinician on 01/27/2023						18	0 -0.90.70.50.30.10.1	0.3 0.5 0.7	0.9
Client Tracking						_			
MH Outpatient					<u>Vitals</u>		-	Ţ	_
0% Task		Status		Date		No Informat	ion		
Demographics Upda	ate Due	In Progre	SS	01/29/2			.	Ţ	<u>.</u>
	ate Due	In Progre	55		Allergies	lergies	1	Ç	1
	ate Due	In Progre	\$\$		Allergies	lergies No Informat		_	2]
Demographics Upd	ate Due	In Progre	55		Allergies	-		_	₽
	tte Due		ss Agtom@2Address Year	01/29/2 : 123 hea	Allergies All Medications	-		_	-
Demographics Updi Summary Name : Another, Test			AჭხთმΆddress	<u>01/29/2</u> : 123	Allergies Al Medications	No Informat	tion Start	_	<u></u>
Summary Name : Another, Test Home Phone : 8881234444	DOB	: 10/10/1990	AჭხთმΆddress	01/29/2 : 123 hear CA S	Allergies All All All All All All All All All Al	No Informat Instruction No Informat	tion Start	_	End
Demographics Updi Summary Name : Another, Test Home Phone : 8881234444 Emergency Contact :	DOB E-Mail	: 10/10/1990	Aġbomâ∕Address Year	01/29/2 : 123 hear CA S	Allergies Al Medications	No Informat Instruction No Informat	tion Start	_	<u></u>
Demographics Updi Summary Name : Another, Test Home Phone : 8881234444 Emergency Contact :	DOB E-Mail Primary Clinician	: 10/10/1990 : :	Aġbomâ∕Address Year	01/29/2 : 123 hear CA S	Allergies All All All All All All All All All Al	No Informat Instruction No Informat	tion Start	_	End

- 3. You can pin the SmartView so that it's not overlapping the other parts of the screen. The below screenshot shows the pinned version. You can select 1 of 3 options for pinning the screen:
 - a. Pin to the client will always be pinned when opening this client.
 - b. Pin to the screen will always be pinned when on this screen.
 - c. Pin to the screen and the client both a & b.

Q 🛉 Local Another, Test (1209) 🗎 🛛	<u>au + ×</u>						🖆 🌾 :	🕑 ? Rober	t Clinici	an - し
Client Dashboard						3		00	• 🗄	Save
Upcoming Appointments(31) All 📿	Current Medication(0)	All C	Treatment Tear	n	All 📿	SmartViev	/			×
PsychoTherapy on 01/23/2023 at 08:00 AM with Clinician, Robert	No data to display		Role		Name	Vitals				1
Alcohol and/or drug services; group counseling	no data to display		Program Assignr Outpatient MH		Clinician, Robert				1.	
by a clinician on 01/23/2023 at 11:00 AM with Clinician, SUD			<unknown td="" tea<=""><td>m Role></td><td>Staff, Psychiatrist</td><td></td><td>No Info</td><td>ormation</td><td></td><td></td></unknown>	m Role>	Staff, Psychiatrist		No Info	ormation		
Alcohol and/or drug services: group counseling by a clinician on 01/25/2023 at 11:00 AM with Clinician, SUD						Allergies		-	Ģ	a
Alcohol and/or drug services; group counseling							Allergies		Туре	
by a clinician on 01/27/2023 at 11:00 AM with							No Info	ormation		
Client Tracking		All C	Documents To I	Do(387)	C	Medications		.	Ģ	2
MH Outpatient		~	CSI Standalone Collection	2022-04-01	<u>To Do</u>	Name	Instruction	Start		End
0%			Narrative	2022-06-03	In Progress	Name		ormation		CHU
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			Narrative	2022-08-22	<u>To Do</u>	R	le	Nar	ne	
			Narrative	2022-08-25	In Progress		nment Staff: Outp MH Adult*	atient Clin	ician, Ro	bert
Summary		C					own Team Role>	Staf	f, Psychia	trist
Name : Another, Test DOB	: 10/10/1990 Ageoma2Address Year	: 123 Erhardt St heavyton,				Client Tracki	ng	-	Ģ	2
Home Phone : 8881234444 E-Mail	:	CA 90001				MH Outpatie	nt			~
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© Streamline Healthcare Solutions SmartCare CalMHSASmart								6020	2201170	5.7602 🚯

Screens vs. Document

Screens are forms that, when updated, only show the most recent information. Documents, on the other hand, will save the finalized version in a pdf in order to capture data at a point-in-time.

Life Cycle of the Client: Request for Services

There are many methods used to initialize services, but all start with some sort of request for services. This section will go into how to document these types of requests and how to move a client through the initialization process. Each county has an Access Line that's available 24/7 for people to call for information about services and to request services. Each county also has a Crisis Line that's available 24/7 for people to call when they're in crisis. Some counties may have walk-in clinics where a person can simply drop-in and request an assessment. Sometimes people requesting services may call another behavioral health phone number or walk into an office that doesn't provide screening, assessment, or crisis services and they need to be redirected. We'll cover all of these scenarios in this section.

How do I document a request for services received via the Access Line?

Access Line calls are documented on the Inquiry screen.

- 1. Search for the Inquiry screen using the search icon.
- 2. Select "Inquiries (My Office)"

E SmartCare	<mark>+09-31-2022</mark> ♀ ★ ▲	
≗ <u>∎</u> ≔		
	S Inquiries (My Office)	
CR CANS Reporting Record Summa	S Client Inquiries (Client)	
	() Wardedroupo	

3. This will bring you to the Inquiries list page. Create a new inquiry by using the new icon.

	ctt.smartcarenet.com/Callv ASmartcareTrain 09-21-202		rtcare ira	iin/baserages/Applicat	ion.aspx?ccsci	a=20000	2=01/06	o/20255550Q	LOADFORFOSTBACK				LI W
SmartCare	Q ★ 🛔									= ° 📫	' 'D ?	Access S	taff 🔻
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My Office >											- 3		
Client >	Recorded By All	~	Assign	ed To All 🗸 🗸	All Dispositio	ons	~	All Status	~	All Inquiry	Туре	🗸 Арр	oly Filter
- Program >	All Programs	~	All Loc	ations 🗸	All Urgency I	.evel	~	All Contact Ty	rpe 🗸 🗸	All Priority	Population	~	
	From 01/01/1900	iii -	To 12/	31/9999 🛗 🕶	Last Name			First Name		Phone			
Administration													
	Client (Potential)	Client	t Id	Inquirer	Start Date	e/Time ⊽	Recor	ded By	Assigned To	Disp	osition	Inquiry St	atus
SmartLinks	Wilson, Stream	<u>1223</u>		Wilson, Brinson	1/4/2023	10:30 AM	Clinicia	an, Robert				In Progress	;
ppointment Search 🛛 🛇	Tax, Registration	<u>1220</u>		Test, Regimention	<u>1/3/2023</u>	10:13 AM	Rowe,	Charla				In Progress	\$
	Print, Second			Pillan, Anna	1/1/2023	10:53 AM	Clinicia	an, Robert				In Progress	;
	Collected, Tryliger	<u>1217</u>		Citizense, Tyrigen	12/30/202	22 2:06 PM	Willian	ns, LaQuita				In Progress	\$
	Chinese, Proc.	<u>1216</u>		Chiefe, Peak	12/30/202	22 8:56 AM	Willian	ns, LaQuita				In Progress	;
	Test, Robert	<u>1215</u>		Test, Rottanti	12/29/202	22 3:21 PM	Staff, A	Access				In Progress	\$
	Test, Totaville	<u>1214</u>		Test, Totaville	12/29/202	22 2:58 PM	Clinicia	an, Robert				Complete	
	100.00.000	<u>1213</u>		100.00	12/29/202	22 12:04 P	Fitzger	rald, John				In Progress	\$
	Roberts, Arabia	<u>1209</u>		Anderson, Arranta	12/29/202	22 8:25 AM	Staff, A	Access				In Progress	;
	Test, Decage	<u>1208</u>		Test, Testage	12/29/202	22 8:17 AM	Rowe,	Charla				In Progress	\$
	Tana, China	<u>1207</u>		fast, Deta	12/28/202	22 5:02 PM	Rowe,	Charla	Clinician, Rober	t		In Progress	;
	Recept, Nat	<u>1204</u>		Barrey, C. Tanti	12/28/202	22 2:37 PM	Baize,	Jacob				Complete	
	Test, Seattle	<u>1206</u>		Test, Sectors	12/28/202	22 12:55 P	Clinicia	an, Robert				In Progress	;
	Cameron, Sta	<u>1203</u>		Cameron, No.	12/28/202	22 8:44 AM	Willian	ns, LaQuita				In Progress	\$
	Test, Severage	<u>1201</u>		Test, Severage	12/27/202	22 4:10 PM	Clinicia	an, Robert				In Progress	;
	access, eccess.	<u>1200</u>		access, eccess.	12/27/202	22 4:01 PM	Fitzger	rald, John				In Progress	\$
	Rents, Teat	<u>1196</u>		April, Tax	12/27/202	22 1:44 PM	Sulliva	n, Kevin				In Progress	;
	Poster, Party			Postile, Narry	12/27/202	22 1:27 PM	Sulliva	n, Kevin				In Progress	\$
	preparation, pro-	<u>1195</u>		pressources, pro-	12/27/202	22 1:18 PM	Fitzger	rald, John	Sullivan, Kevin			In Progress	;
	Term, Regular	<u>1194</u>		Term, Register	12/27/202	22 1:12 PM	Staff, A	Access				Complete	
	Roberts, Long	<u>1192</u>		Roberts, Colly	12/26/202	22 9:49 PM	Willian	ns, LaQuita				In Progres	?
	Tax Cont	1190		Test Cont	12/23/202	2 4:13 PM	Rowe.	Charla				Complete	

4. This will bring up the client search window. You may search to determine if the person is a current client. If person is a new client, or you cannot find them in the system, click "Inquiry (New Client)".

ent Search							?
Clear ame Search 🗌 In	nclude Client Conta	cts 🗌 Only Include Act	tive Clients (Checking w	rill not allow c	ption to crea	te new Client)	
Broad Search	Narrow Search	Type of Client OInc	dividual 🔵 Organizatio	n All Clier	nt Search		
Last Name		First Name		Program		~	
ther Search Strate	egies						
SSN Search			Phone # Search				
DOB Search			Master Client ID S	earch			
Primary Clinician	Search	~	Client ID Search				
Authorization II)/#		Insured ID Search				
ecords Found							
ID Master	ID Client Name	△ <u>Chosen Name</u>	SSN/EIN DOB	<u>Status</u>	<u>City</u>	Primary Clinician	
		No dot	a to display				
		NO GAL	α το σιορταγ				
							-
					Sel	ect Cance	
					Sei	4	

a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc. If you find the person in the system, meaning they show in the Records Found section, click "Select" to bring their information into the Inquiry screen.

Client Search	? 🛛
Clear	
Name Search Include Client Contacts Only Include Active Clients (Checking will not allow op	otion to create new Client)
Broad Search Narrow Search Type of Client • Individual Organization All Client	t Search
Last Name Program	~
Other Search Strategies	
SSN Search Phone # Search	
DOB Search 🗰 🔻 Master Client ID Search	
Primary Clinician Search Client ID Search	
Authorization ID / # Insured ID Search	
Records Found	
ID Master ID Client Name Chosen Name SSN/EIN DOB Status	City Primary Clinician
	^
No data to display	
	-
 (1) 	a 💦 🔸
	Select Cancel
	Inquiry (New Client)

- 5. This brings you to the Inquiry Details screen. Complete the information about the caller, or "Inquirer".
 - a. If the client is calling for themselves, select "Self" under "Relation to Client." This way, as you enter the caller's information, it will push this information automatically into the "Client Information" section.
 - b. Make sure to input the start date and time of the call. There are buttons for "T" (today) and "Now" to help make this quick and easy.

Inquirer In	formation 🗌 Cris	s	a							
Relation To Cli	ent Self	Ý	First Name	Manual	Mid	dle Name		Last N	ame Training	
Call Back	(916) 555-7878		Ext		Em	ail				
Start Date	01/06/2023 1	Y ⊞ ▼	Start Time	05:16 PM	1 Now)				
						/				
Client Info	rmation (Potentia	.1)								
Client Info	rmation (Fotentia	at <i>)</i>								
First Name	Manual 🚽	muute Nam	le		Last Name	Training	Clier	t ID	Sex	Male 🗸
SSN		SSN Unk	nown/Refused		DOB	06/07/2002	🛗 🔻 Age (20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell			Email					
Client is not	Client is homeless	Cl homel	ient is chronically ess	(Urgency Level 🔸					~
Address1					Inquiry type					~
Address2					Contact type 🔸					~
City				Pr	iority Population					~
State	~	Zip		Cour	nty of Residence	Search here			₫	
	blem				Current Client In	ormation (If a	nv)			

- 6. Complete the information about the potential client.
 - a. Complete the First Name and Last Name fields. Middle Name is not required but can be added as necessary.
 - b. Complete the SSN and DOB fields. This is for the client's social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or doesn't know, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN".
 - c. Complete the Sex field.
 - d. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.
 - e. Click Save.

Relation To Cl	Calf	~	First Name	Manual		iddle Name	Leat No.	ame Training	
				manuat			Last Na	ame training	
Call Back	(916) 555-7878		Ext			mail			
Start Date	01/06/2023	т ү 🛗 🕶	Start Time	05:16 PM	Now				
Client Info	rmation (Potenti	ial)							
First Name	Manual	Middle Nam	e		Last Name	Training	Client ID	Sex	Male 🗸
SSN		SSN Unkr	nown/Refuse	d	DOB	06/07/2002	🛗 🔻 Age (20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell			Email				
Client is not		<u> </u>	ent is chronica	lly	Urgency Level	Not urgent			~
homeless	homeless	homele	55		- ·	_			
Address1					Inquiry type	Request for serv	ices/screening		~
Address2					Contact type	Call			~
City				Pric	ority Population				*
State	~	Zip		Count	y of Residence	Search here			
Presenting Pro	oblem				Current Client I	Information (If any)		

Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition	Use when the reason for the call is for another provider to coordinate transition
Coordination	of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

7. Select the "Link/Create Client" button. This will bring up the client search window, with a few extra buttons at the bottom.



- a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
- b. You must also search by SSN and DOB by clicking on those respective buttons.

ient Search							?
Clear Name Search	Include Client Cont	acts 🗌 Only Include Act	ive Clients (Checking wi	ill not allow op	otion to creat	e new Client)	
Broad Searc	h Narrow Search	Type of Client OInc	lividual Organizatior	All Clien	t Search		
a Last Name	Training	First Name	anual	Program		~	
Other Search St	rategies						
SSN Searc DOB Searc Primary Clinic Authorizatio	h 06/07/2 :ian Search	99 9999 002 🚔 🕶	Phone # Search Master Client ID Se Client ID Search Insured ID Search				
	ster ID <u>Client Name</u>	△ <u>Chosen Name</u>	SSN/EIN DOB	Status	<u>City</u>	Primary Clinician	1
		No data	to display				
					Sele	ect Canc) el
					C	reate New Client R	ecor

c. If no records are found based on the search you do, an alert will show at the top of the window.

Broad Sear	rch Narro Training	w Search	Type of Client •	Individual 🔵 Org Manual	anization All Program	Client Search	~
ner Search S	trategies						
SSN Sear	ch	999 99	9999	Phone # 5	Search		
DOB Sear	ch	06/07/2002	2 🛗 🕶	Master Cli	ent ID Search		
Primary Clini	ician Search		~	Client ID	Search		
Authorizati	ion ID / #			Insured II) Search		
cords Found							
ID Ma	aster ID Clie	nt Name	△ Chosen Name	SSN/EIN	OOB Stat	us <u>City</u>	Primary Clinician
			No.s	data to display			

- d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
- e. If the person is already a client in the system, select the button next to the appropriate record.
- f. Click "Select" to link the Inquiry to the selected client.
- g. If the person is not a client, meaning no records were found matching the client's information, **click** "Create New Client Record."

						hecking will I	not allow o	ption to create	e new clienty
	Broad	Search	Narrow Search Ty	/pe of Client 💿	Individual 🔿 O	rganization	All Clier	nt Search	
	Last Nam	ne Trai	ining	First Name	Manual	F	Program		~
Oth	er Searc	h Strategi	es						
	SSN S	Search	999 99	9999	Phone #	# Search			
	DOB	Search	06/07/2002		Master (lient ID Sear	ch		
	Primary	Clinician Sea	rch	- •	Client I	D Search			
	-	ization ID / #			Insured	ID Search			
	ords Fou	und							
Rec	ID	Master ID	Client Name △	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
0	<u>ID</u> 1234	Master ID 1234	<u>Client Name</u> ∆	<u>Chosen Name</u>	<u>SSN/EIN</u> 9999	<u>DOB</u> 08/29/19		<u>City</u>	Primary Clinician
_	_		<u>Client Name</u> △	<u>Chosen Name</u>			Active	<u>City</u>	Primary Clinician
_	— 1234	1234	<u>Client Name</u> ∆	<u>Chosen Name</u>	9999	08/29/19	Active Active	<u>City</u>	Primary Clinician
_	1234 1 e	1234 1081	<u>Client Name</u> ∆	<u>Chosen Name</u>	9999 9999	08/29/19	Active Active Active	<u>City</u> heavyton	Primary Clinician
_	1234 1 e 1072	1234 1081 1072	<u>Client Name</u> ∆	Chosen Name	9999 9999 9999	08/29/19 09/17/19 03/03/19	Active Active Active Active	, · ·	Primary Clinician
_	1234 1 e 1072 1209	1234 1081 1072 1209	<u>Client Name</u> ∆	Chosen Name	9999 9999 9999 9999 9999	08/29/19 09/17/19 03/03/19 10/10/19	Active Active Active Active Active	, · ·	

h. This will take you back to the Inquiry screen but now a client ID number will be added.

nquirer In	formation 🗌 Cris	is									
Relation To Cl	ient Self	~	First Name	Manual	Ν	1iddle Name		Last Na	me Training		
Call Back	(916) 555-7878		Ext		E	mail					
Start Date	01/06/2023	Γ Y ⊞ -	Start Time	5:16 PM	Now						
Client Info	ormation (Potenti	al)					h				
irst Name	Manual	Middle Nam	e		Last Name	Training	Client I	D <u>1239</u>	Sex	Male	•
SN	999999999	SSN Unk	nown/Refuse	d	DOB	06/07/2002	. 🗎 🕆 Age (20) Years)	Medi-Cal ID		
lome Phone	(916) 555-7878	Cell			Email						
Client is not omeless	Client is homeless	Cli homele	ent is chronica ess	lly	Urgency Level	Not urgent					~
Address1					Inquiry type	Request for s	ervices/screening	ŝ			~
Address2					Contact type	Call					~
City				Pric	ority Population						•
State	~	Zip		Count	y of Residence	Search here			₫		
Presenting Pro	oblem				Current Client	Information (If a	any)				
					Client Id: 123	39					

- 8. Click on the "Insurance" tab.
 - a. Select "Medi-Cal" from the "Payer" drop-down and enter the client's Medi-Cal number (CIN) in the "Insurance ID" field. Click "Verify" to verify the client's Medi-Cal insurance.

Inquiry Detai	ls		Remove Client Lin	k Link/Create Clier	nt Register Client 🔅	i /	^₿ 💼	8	Save	×
Initial Insura		ographics								
Electronic Elig	ibility Verifi	ication	а							
Payer	~	Insurance Id	Verify							
Coverage Info	rmation 🔽	Show Current Plan	s Only							
Plan			Insured ID	Group ID	Comment					
Coverage Informat	tion								Add	

- 9. Click on the "Demographics" tab.
 - a. We recommend **completing the "Gender Identity" and "Pronoun" fields** to ensure the person is not misgendered as additional staff engage with the client.

iquiry Details	9		Remove Client Link Link,	/Create Client Register Clie	nt 🌣 i	^₿	Save
Initial Insurance	Demographics						
General Information							
Primary Care Coordinator		✓ Medical Provider	~	Professional Suffix			Active
Prefix		✓ Suffix	~	•			
Identifying Information	on						
	~	Gender Identity	~	Sexual Orientation			~
Marital Status	~ ₩ ~	Gender Identity Cause of Death		Sexual Orientation			~
Marital Status		L		a)	o provide		

b. **Complete the "Primary/Preferred Language" field.** If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.

nquiry Details			Remove Client Link	Link/Create Client	Register Client	i 🖧	ē ⊖	Save
Initial Insuran Employment Information	e Demographics							
Language Primary/Preferred L Interpreter Serv		•	Client does not speak	b English Hispanio	: Origin		~	
Transportation I		service animal, high	rise)					
Preferences Communication Preference Days Geographic Location Comment	M T W Th F		Mobile Phone Provider		~			
								2

- 10. You may enter any additional information in any of the tabs, but none are required. Once complete, **enter the end date and time of the Inquiry and change the status to "Complete".** Once again, there are "T" (today) and "Now" buttons to make this easier.
- 11. Click Save. You may now close the Inquiry and move on to Screening.

nquiry Deta	ails	Guide Menu			Remo	ove Client	Link	Link	'Create Client	Reg	gister Client	\$ i ′	^ ₿ ⁄ 🖬	ī 🖶	🖬 Sav	•
Initial Insu	rance	Demograph	nics											1	1	
SUD	() Y	es () No	0	Not Evaluated		Client is se	eking s	ervice	3							
								~								
Injecting Drugs Pregnant		<u> </u>	-	Unknown Unknown	0	Not Applic	able									
- rognant	0.			onatown		norrippin										
Disposition																
Select Disp	osition								~							
									•							
56		rvice Type								~						
		Select Provider/Ag	gency								~					
Ad		<u>dd Provider</u> ice Type														
Assigned S		<u>oo 1990</u>					٠		Assigned Work(Group					~	
_		Comments					_									
Add Dispos	sition															
Screening Comr	ment -	Include Follow l	Jp and	Contact Inform	nation		Add	ditiona	l Waitlist infor	mation						
											10					
End Date		ТҮ 🛗 🕶	End T	Time	Now	Status	In Prog	ress			$\overline{}$					
				L			-									

How do I document calls to the Crisis Line?

Crisis Line calls are documented on the Inquiry screen. This is simply how to document a call. Follow your county's procedures for handling crisis situations. Also consider the context of your crisis call when asking for information. Address the client's most pressing needs before attempting to gather information such as demographics or date of birth.

- 1. Search for the Inquiry screen using the search icon.
- 2. Select "Inquiries (My Office)"



3. This will bring you to the Inquiries list page. If this call was transferred to you, search the list page to determine if an inquiry has already been started for this client. If so, **click the link in the Start Date/Time column**. If an inquiry has not been started, or if the call was direct to the crisis line, **create a new inquiry** by using the new icon.

Inquiries → C ■ calr		× +									- 0
			_	are Train/Base Pages/Applicati	ion.aspx?&scld=28&time	=01/0	5/20235530&L	oadForPostBack=	:Y#His ० , 🔍 ।		њ Ш (
SmartCare		nartcareTrain 09-21-202	2						🖆 🧳 🖱 🕯	Acces	s Staff 🔻
	≣	Inquiries (162)							☆★:		⊞≣
My Office	>								6		
Client	>	Recorded By All	~ /	Assigned To All 🗸 🗸	All Dispositions	~	All Status	~	All Inquiry Type		Apply Filte
	>	All Programs	× /	All Locations 🗸	All Urgency Level	~	All Contact Ty	oe 🗸	All Priority Population	~	
Program		From 01/01/1900	⊞ − то	12/31/9999 🛗 🕶	Last Name		First Name		Phone		
Administration	>										
		Client (Potential)	Client Id	Inquirer	Start Date/Time ⊽	Reco	rded By	Assigned To	Disposition	Inquir	Status
SmartLinks		Print, Array	<u>1223</u>	Witten, Annue	1/4/2023 10:30 AM	Clinici	an, Robert			In Prog	ress
oointment Search	0	Test, Registration	<u>1220</u>	Test, Registration	<u>1/3/2023 10:13 AM</u>	Rowe,	Charla			In Prog	ress
		Print, Series		Print, Series	<u>1/1/2023 10:53 AM</u>	Clinici	an, Robert			In Prog	ress
		Cittacore, Vydgan	<u>1217</u>	Citherret, Tydger	12/30/2022 2:06 PM	Williar	ns, LaQuita			In Prog	ress
		Charles Proc	<u>1216</u>	Charles Prod	12/30/2022 8:56 AM	Williar	ns, LaQuita			In Prog	ress
		Test, Rottest	<u>1215</u>	Test, Rottanti	12/29/2022 3:21 PM					In Prog	
		Test, Transition	<u>1214</u>	Test, Totaville	12/29/2022 2:58 PM					Comple	
		100.00	1213	100.00	12/29/2022 12:04 PM					In Prog	
		Redenant, Reality	<u>1209</u>	Roberts, Arnela	12/29/2022 8:25 AM					In Prog	
		ten, ten ge	<u>1208</u>	fact, fact opt	12/29/2022 8:17 AM					In Prog	
		fam. On a	<u>1207</u>	Tank, Chris	12/28/2022 5:02 PM			Clinician, Robert		In Prog	
		Second Second	<u>1204</u>	Receipt, New	12/28/2022 2:37 PM					Comple	
			1206	Tana America	12/28/2022 12:55 PM					In Prog	
		Canada da C	1203 1201	Canada and Annual State	12/28/2022 8:44 AM 12/27/2022 4:10 PM					In Prog	
		and the second	1201	and the second	12/27/2022 4:10 PM					In Prog In Prog	
		Anna las	1200	Anna las	12/27/2022 1:44 PM					In Prog	
		Roome Party	1170	Frank State	12/27/2022 1:44 PM					In Prog	
			1195	second second second	12/27/2022 1:18 PM			Sullivan, Kevin		In Prog	
		Income Property	1194	Taxan Report	12/27/2022 1:12 PM	-				Comple	
		Reports, Long	1192	Reports, Caller	12/26/2022 9:49 PM					In Prog	
			1190		12/23/2022 4:13 PM					Comple	_ (

- 4. This will bring up the client search window. Search to determine if the person is a client in the system. The search includes both current and past clients. You can also skip this step by selecting "Inquiry (New Client)" if you know for certain this person is not a client in the system (e.g. they don't have a SmartCare client ID).
 - a. If there are no matching records, an alert will show at the top of the Client Search window. You may want to try searching by DOB or SSN. If there are no results, select "Cancel." This will take you to the Inquiry screen.

Client Search	
	a
Clear	8 No Search Records Found
Name Searc	h 📃 Include Client Contacts 📃 Only Include Active Clients (Chec
Broad	Search Narrow Search Type of Client • Individual Organ

b. Any search results will show in the "Records Found" area. Review the Records Found to determine if the person is already in the system as a client. If the person is already a client in the system, select the button next to the appropriate record. Click "Select" to link the Inquiry to the selected client. This will take you to the Inquiry screen and pre-populate the Client Information section.

ent Search										e
Clear	Te elu	de Olient Oretente (O-lu I-sluda	Antine Oliverte (C	New all days and	1		01		
lame Searc		Ide Client Contacts	_ Uniy Include	Active Clients (0	necking wi	I not allow o	ption to cr	reate new Cli	ient)	_
Broad	Search I	Narrow Search Ty	/pe of Client 🛛	Individual 🔿 C	rganization	All Clie	nt Search			
Last Nam	ne Trai	ining	First Name	Manual		Program			~	
ther Searc	h Strategi	es								
CONC	Search			Dhone	# Search					
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	Clinician Sea		· · ·		D Search					
	ization ID / #		•		ID Search					
				Insured	ID Jearch					
ecords Fou	ind									
ID	Master ID	Client Name △	Chosen Name	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Prima	r <u>y Clinician</u>	
1239	1239	Training, Manual		9999	06/07/20	Active				
(_	b			
								Select	Cancel	f

- 5. Complete the information about the caller, or "Inquirer".
 - a. Complete the **"Relation to Client" field.** If the client is calling for themselves, select "Self". If you've already selected a client, this section will auto-populate with the client's information. If the person is not already a client, as you enter the caller's information, it will push this information automatically into the "Client Information" section.
 - b. Enter the start date and time of the call. There are buttons for "T" (today) and "Now" to help make this quick and easy.
 - c. You may also **consider getting a call back number**, in case the client is disconnected or hangs up.

	formation 🗌 Cris									
Relation To Cli	0.16	∠ a	t Name Manual	Maria	dle Name			e Training		-
Call Back		C	manual Manual				Last Nam	ie fraining		
	(916) 555-7878			Ema						
Start Date	01/06/2023 1	Y 🛗 🔻 Star	t Time 05:16 P	M Now						
Client Info	rmation (Potentia	al)								
										_
First Name	Manual 🛑	modie Name		Last Name	Training	Client ID		Sex	Male 🗸	
SSN		SSN Unknown	/Refused	DOB	06/07/2002	🛗 🔻 Age (20 Ye	ars)	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell		Email						
Client is not homeless	Client is homeless	Client is homeless	chronically	Urgency Level 🔸					~	
Address1				Inquiry type					~	
Address2				Contact type 🔸					~	
City			P	riority Population					~	
	~	Zip	Cou	inty of Residence	Search here					
State	•									

- 6. If the person is not a current client, add them as a client. To do this, **complete/confirm the client's First Name and Last Name fields**.
 - a. **Complete the SSN, DOB, and Sex fields.** If the client refuses to share their SSN, doesn't know their SSN, or is not in a situation to answer, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "9999999999", which is SmartCare's version of "no SSN". If the client is unable to provide their date of birth, enter your county's standard response to indicate "unknown DOB". All of these fields can be updated at a later date.
 - b. Click Save.

quiry Deta					emove Client L		ate Client F	Register Client	~ 1 ~	b	
Initial Insu	rance Demogr	aphics									
Inquirer Info	rmation 🗌 Cris	is									
Relation To Clien	t Self	~	First Name	Manual		Middle Name		Last Name	Training		
Call Back	(916) 555-7878		Ext			Email					
Start Date	01/06/2023	гүш⊸	Start Time	7:16 PM	Now						
	nation (Potenti	-			Loot Non	Training	Client		Cov	Mala	
First Name Ma	n ation (Potenti anual 99-99-9999	al) Middle Nam		ed	Last Name DOB	Training 01/01/1900	Client I		Sex Medi-Cal ID	Male	~
First Name Ma SSN 99	anual 99-99-9999	Middle Nam		ed							~
First Name Ma SSN 99 Home Phone (9: Client is not	anual 99-99-9999	Middle Nam	nown/Refuse		DOB	01/01/1900					~
First Name Ma SSN 99 Home Phone (9:	anual 09-99-9999 16) 555-7878 Client is	Middle Nam SSN Unk Cell	nown/Refuse		DOB Email	01/01/1900 el Emergent					
First Name Ma SSN 99 Home Phone (9: Client is not homeless Address1	anual 09-99-9999 16) 555-7878 Client is	Middle Nam SSN Unk Cell	nown/Refuse		DOB Email Urgency Leve	01/01/1900 el Emergent Crisis					~
First Name Ma SSN 99 Home Phone (9: Client is not homeless	anual 09-99-9999 16) 555-7878 Client is	Middle Nam SSN Unk Cell	nown/Refuse	lly	DOB Email Urgency Leve Inquiry type	01/01/1900 el Emergent Crisis					~

7. Select the "Link/Create Client" button. This will bring up the client search window, with a few extra buttons at the bottom.



- a. You must search by name by clicking on either "Broad Search" or "Narrow Search".
- b. You must also **search by SSN and DOB** by clicking on those respective buttons.

Clear Vame Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client) Broad Search Narrow Search Type of Client Individual Organization All Client Search Training First Name Manual Program Other Search Strategies SSN Search 999 99 999 Phone # Search 06/07/2002 T Master Client ID Search 06/07/2002 T Master Client ID Search 105 Cl	ent Search					(
Name Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client) Broad Search Narrow Search Type of Client Individual Organization All Client Search at Name Training First Name Manual Program Image: Client Search Other Search 999 99 Phone # Search Image: Client ID Search DOB Search 06/07/2002 Image: Client ID Search Image: Client ID Search Primary Clinician Search Image: Client ID Search Image: Client ID Search Authorization ID /# Image: Client ID Search Image: Client ID Search	Closer					
Broad Search Narrow Search Type of Client Individual Organization All Client Search Program ✓ Other Search 999 999 99 999 99 Phone # Search DOB Search 06/07/2002 Object Master Client ID Search Primary Clinician Search Authorization ID / #		t Contacts 🗌 Only Include Activ	e Clients (Checking w	ill not allow o	ption to crea	te new Client)
a Training First Name Manual Program Wher Search Strategies SSN Search 999 Phone # Search 06/07/2002 * Client ID Search <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
Last Hance High Hance <td>a</td> <td></td> <td></td> <td></td> <td>nt Search</td> <td></td>	a				nt Search	
SSN Search 999 99 9999 Phone # Search DOB Search 06/07/2002 Image: Client ID Search Image: Client ID Search Primary Clinician Search Image: Client ID Search Image: Client ID Search Authorization ID / # Insured ID Search	Last Name Iraining	First Name Mar	านลไ	Program		~
DOB Search 06/07/2002 Master Client ID Search Primary Clinician Search Client ID Search Authorization ID / # Insured ID Search	her Search Strategies					
Primary Clinician Search Client ID Search Authorization ID / # Insured ID Search Records Found Insured ID Search Insured I	SSN Search 99	99 9999	Phone # Search			
Primary Clinician Search Client ID Search Authorization ID / # Insured ID Search Records Found Client ID Search Client ID Search	DOB Search 06	/07/2002 🛗 🕶	Master Client ID Se	earch		
lecords Found	Primary Clinician Search	~	Client ID Search			
	Authorization ID / #		Insured ID Search			
	ecords Found					
				0 1 1		
ID Master ID Client Name Chosen Name SSN/EIN DOB Status City Primary Clinician	ID Master ID Client I	Iame 🛆 <u>Chosen Name</u>	SSN/EIN DOB	Status	<u>Lity</u>	Primary Clinician
		No data t	to display			
No data to display						
No data to display						•
No data to display					Sel	ect Cancel
						Create New Client Reco

c. If no records are found based on the search you do, an alert will show at the top of the window.

Broad Sear	rch Narro Training	w Search	Type of Client •	Individual 🔵 Org Manual	anization All Program	Client Search	~
ner Search S	trategies						
SSN Sear	ch	999 99	9999	Phone # 5	Search		
DOB Sear	ch	06/07/2002	2 🛗 🕶	Master Cli	ent ID Search		
Primary Clini	ician Search		~	Client ID	Search		
Authorizati	ion ID / #			Insured II) Search		
cords Found							
ID Ma	aster ID Clie	nt Name	△ Chosen Name	SSN/EIN	OOB Stat	us <u>City</u>	Primary Clinician
			No.s	data to display			

- d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
- e. If the person is already a client in the system, select the button next to the appropriate record.
- f. Click "Select" to link the Inquiry to the selected client.
- g. If the person is not a client, meaning no records were found matching the client's information, **click** "Create New Client Record."

						-			
	Broad Sea	urch N	larrow Search T	ype of Client 💿	Individual 🔾 0	rganization	All Clier	nt Search	
	Last Name	Trair	ning	First Name	Manual		Program		~
Oth	er Search S	Strategie	s						
	SSN Sea	rch	999 99	9999	Phone #	# Search			
	DOB Sea	rch	06/07/2002		Master 0	lient ID Sea	ch		
	Primary Clin	nician Sear	ch	_ _		D Search			
	-	tion ID / #			Insured	ID Search			
_	ords Found	:							
Rec	ID M	aster ID	<u>Client Name</u> △	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
Rec		aster ID 234	<u>Client Name</u> ∆	<u>Chosen Name</u>	<u>SSN/EIN</u> 9999	<u>DOB</u> 08/29/19		<u>City</u>	Primary Clinician
	1234 1		<u>Client Name</u> Δ	<u>Chosen Name</u>			Active	<u>City</u>	Primary Clinician
	1234 1 1 e 1	234	<u>Client Name</u> ∆	<u>Chosen Name</u>	9999	08/29/19	Active Active	<u>City</u>	Primary Clinician
	1234 11 1 e 10 1072 10	234 081	<u>Client Name</u> ∆	<u>Chosen Name</u>	9999 9999	08/29/19	Active Active Active	<u>City</u> heavyton	Primary Clinician
	1234 1. 1 C 1. 1072 1. 1209 1.	234 081 072	<u>Client Name</u> △	<u>Chosen Name</u>	9999 9999 9999	08/29/19 09/17/19 03/03/19	Active Active Active Active		Primary Clinician
	1234 11 1 e 11 1072 11 1209 11 1096 11	234 081 072 209	<u>Client Name</u> △	<u>Chosen Name</u>	9999 9999 9999 9999	08/29/19 09/17/19 03/03/19 10/10/19	Active Active Active Active Active		

h. This will take you back to the Inquiry screen but now a client ID number will be added.

Client Info	ormation (Poten	tial)		h				
First Name	Manual	Middle Name	Last Name	Training	Client ID 1239	Sex	Male	~
SSN	999999999	SSN Unknown/Refused	DOB	06/07/2002	Age (20 Years)	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell	Email					

8. Assess the urgency of the call, as sometimes people call the Crisis Line by mistake. **Complete the Urgency Level**, **Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.

First Name	Manual	Middle Name	Last Name	Training	Client ID 1239	Sex M	ale 🗸
SSN	999-99-9999	SSN Unknown/Refused	d DOB	06/07/2002	Age (20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell	8 Email				
Client is not nomeless	Client is homeless	Client is chronical! homeless	y Urgency Level	Emergent			~
Address1			Inquiry type	Crisis			~
Address2			Contact type	Call			~
City			Priority Population				~
State	~	Zip	County of Residence	Search here		<u>ک</u>	
Presenting Pr	oblem		Current Client	Information (If any)			
			Client Id: 123 Last Inquiry E	39 Date: 01/06/23			
			Coverage Hist	tory			

Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition	Use when the reason for the call is for another provider to coordinate transition
Coordination	of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

9. If the person is actually in crisis, **select the checkbox labeled "Crisis"** at the top of the screen. This opens a new tab where you'll document your call with the client. If the client is not actually in crisis, document the call as appropriate. If the client is requesting services, we recommend following the steps in How do I document a request for services received via the Access Line?



- a. In the Crisis tab, enter the service information. This will then open a text field for you to enter the note.
- b. Enter narrative information in the Narration field.
- c. Click Save.

[nquir	y Details	6		Remove Client Link	Link/Create Client	Register Client 🏚 A	₿ 💼	
Initial	Insuran	ce Demographics	Crisis					С
Servio	ce Informa	ation					а	
	Program	SUD Screening	~	Procedure	Code Crisis Inte	rvention Services, per 15 min	~	
	Clinician	Staff, Access		Location	Telehealth	1	~	
	Start Date	01/06/2023 🛅 🔻	Start Time	6:53 PM	End Time			
Note	Open Ser							
	ent called rep	orting						

- 10. When you're finished with the crisis call, navigate back to the Initial tab and scroll to the bottom of the page. Enter the end date and time of the Inquiry and change the status to "Complete". Once again, there are "T" (today) and "Now" buttons to make this easier.
- 11. Click Save.
- 12. Navigate back to the Crisis tab.

Initial Insu	rance	Demograph	ics	Crisis											11		
SUD	() Yes	() No	-	ot Evaluated	. I	_ Cli	ent is seek	king serv	/ices								
			-					,	~								
njecting Drugs	O Yes	O No	O U	nknown													
regnant	Yes	🔘 No	() U	nknown		O No	ot Applicab	ole									
Disposition																	_
Select Disp	osition									~							
Se	elect Servic	е Туре									~						
	Sele	ct Provider/Ag	ency									~					
	Add	Provider															
Ado	<u>Add</u>																
Add Assigned S	d Service						<	₫	Assign	ed WorkGrou	qL					~	
Assigned S	d Service	<u>Type</u>					<		Assign	ed WorkGrou	qu					~	
Assigned S	d Service Staff	<u>Type</u>							Assign	ed WorkGrou	qL					~	
Assigned S	d Service Staff	<u>Type</u>						₫	Assign	ed WorkGrou	qı					~	(
Assigned S	d Service Staff position Con	<u>Type</u>						2	Assign	ed WorkGrou	qt					~	(
Assigned S Dispo Add Dispos	d Service Staff osition Con	Type nments	Jp and C	ontact Info	rmatio	201	<			ed WorkGrou ist informat						~	
Assigned S Dispo Add Dispos	d Service Staff osition Con	Type nments	Jp and C	Contact Infor	rmatio	זיה										~	
Assigned S Dispo Add Dispos	d Service Staff osition Con	Type nments	Jp and C	iontact Infor	rmatio	'n										~	•
Assigned S Dispo Add Dispos	d Service Staff osition Con	Type nments	Jp and C	iontact Infor	rmatio	n										~	•
Assigned S Dispo	d Service Staff osition Con	Type nments	Jp and C	iontact Infor	rmatio	n						10				~	

13. Click the newly available link for Open Service Note.

nquiry Detai	ls	Remove	Client Link Link/Creat	e Client Register (Client 🌣 i 🐣	ē ⊖ [Save X
Initial Insur	ance Demographics	Crisis					
Service Inform	nation						
Program	SUD Screening	~	Procedure Code	Crisis Intervention Se	ervices, per 15 min 🗸		
Clinician	Staff, Access		Location	Telehealth	~		
Start Date	e 01/06/2023 iii▼	Start Time 6:5	3 PM	End Time	7:11 PM		
Note Open S	ervice Note						
Narration							
Client called re	eporting						

a. This brings up a service note screen. It will pull most information forward, including creating a total duration, based on start and end times. **Enter Emergency Indicator and Mode of Delivery**, as well as any other necessary fields.

lisc Note		1	🎝 🖄 😧 <table-cell> GoTo 🚢</table-cell>	🗙 🚖 🗘 🕹	🗄 🗄 🔰 ?	i 🛅 🖶 🗋 🖬 Save 🗙
Effective 01/06/202	Status To Do	Author	Staff, Access	01/06/2023	00	Sign 💿 🖍 🕇
Service Note	Billing Diagnosis Warnings	Disposition				0
Service						
Status	Show	~	Start Date	01/06	/2023 🛗 🕶	
Program	SUD Screening	~	Start Time	6:53 F	M	
Procedure	Crisis Intervention Services, pe	r 15 mi 🗸 🛛 Mod	ifier Travel Time		Minutes	
Location	Telehealth	~	Face to Face	Time	Minutes	
Clinician	Staff, Access		Documentati	on Time	Minutes	
Mode Of Delivery	~ ~		Total Duratio	n 18	Minutes	
Cancel Reason		✓ a	Attending			~
			Referring			~
Evidence Based Practic	es	~	Emergency I	ndicator		~

b. Click on the Note tab to confirm your narrative note was pulled forward. Add any additional information as needed.

Misc No	te						:	20
Effective	01/06/202	∷ ▼	Status	To Do	D		Author	Staff
Service	Note	Billir	ng Diagno:	sis	Warnings	Dispos	sition	
Client calle		g		_				

c. Click on the Billing Diagnosis tab. If the client already has a diagnosis, you can leave this section as is. If this client does not have a diagnosis, click on the ICD 10 button.

Misc Note	: 🎝 🖄 😔 🚥 🏝 🛠 🛧 🍰 🛍 🖬 🛤 🌎 i 🛅 🖶 🗅 🖬 Save 🗴
Effective 01/06/20 🗮 Status To Do	Author Staff, Access 01/06/2023 Sign O S
Service Note Billing Diagnosis Warnings	Disposition
Billing Diagnosis	
Re-Order Diagnosis Refresh Diagnosis	ICD 10

- d. This brings up a Diagnosis pop-up window. **Search for a diagnosis using the code field or description field.** If you are an LPHA, you may use "Z03.89 Encounter for observation for other suspected diseases and conditions ruled out". If you are not an LPHA, you can select an appropriate Social Determinant of Health, such as "Z60.0 Phase of life problem – Crisis".
- e. Select the code you want to use.
- f. Scroll to the bottom of the screen.

z6	0.0				Search
	ICD10 🗌 SN	OMED Billable	e and Non Billable 🛛 🗸		
	* DSM-5-TR				
	DSM 5/ICD 10	Billable	SNOMED	ICD/ DSM Description	SNOMED Description
)	Z60.0*	Yes	105484002	Phase of life problem	Midlife crisis, life event (finding)
)	Z60.0*	Yes	113162000	Phase of life problem	Dyadic symbiosis (finding)
)	Z60.0*	Yes	162318009	Phase of life problem	Life crisis, life event (finding)
)	Z60.0*	Yes	266965008	Phase of life problem	Retirement problems (finding)
)	Z60.0*	Yes	276080001	Phase of life problem	Retirement unsettled (finding)
)	Z60.0*	Yes	276081002	Phase of life problem	Retirement maladjusted (finding)
)	Z60.0*	Yes	301846009	Phase of life problem	Empty nest syndrome (finding)
	Z60.0*	Yes	32937002	Phase of life problem	Crisis
)	Z60.0*	Yes	365230008	Phase of life problem	Emotional adjustment - finding
)	Z60.0*	Yes	41982003	Phase of life problem	Male climacteric (finding)
	Z60.0*	Yes	423316001	Phase of life problem	Difficulty managing andropause (finding)

g. Click OK.

	* DSM-5-TR				
	DSM 5/ICD 10	Billable	SNOMED	ICD/ DSM Description	SNOMED Description
C	Z60.0*	Yes	105484002	Phase of life problem	Midlife crisis, life event (finding)
0	Z60.0*	Yes	113162000	Phase of life problem	Dyadic symbiosis (finding)
0	Z60.0*	Yes	162318009	Phase of life problem	Life crisis, life event (finding)
0	Z60.0*	Yes	266965008	Phase of life problem	Retirement problems (finding)
0	Z60.0*	Yes	276080001	Phase of life problem	Retirement unsettled (finding)
0	Z60.0*	Yes	276081002	Phase of life problem	Retirement maladjusted (finding)
0	Z60.0*	Yes	301846009	Phase of life problem	Empty nest syndrome (finding)
0	Z60.0*	Yes	32937002	Phase of life problem	Crisis
С	Z60.0*	Yes	365230008	Phase of life problem	Emotional adjustment - finding
0	Z60.0*	Yes	41982003	Phase of life problem	Male climacteric (finding)
0	Z60.0*	Yes	423316001	Phase of life problem	Difficulty managing andropause (finding)
\sim					
- h. This brings you back to the Billing Diagnosis tab on the note. Select "1" from the drop down next to the newly added ICD-10 code.
- i. Once you've completed all pieces of the service note, **click Sign**. You are now finished and may close any open screens.

1isc Note	: 🎝 🖄 😋 GOTO 🚢 😭	t 🛧 🖧 🛍 🗄 🖬 🛤 (? i 🛅 🖶 🗅 🖬 Save
Effective 01/06/20 Image: To Do Service Note Billing Diagnosis Warnings	Author Staff, Access Disposition	01/06/2023	Sign 🛛 🖍 🕂
Billing Diagnosis			ICD 10
Z60.0 - Phase of life problem			

What do I do when I receive a paper referral from a partner agency?

Paper referrals, meaning referrals that are received via a form, fax, paper, etc. are documented on the Inquiry screen.

- 1. Search for the Inquiry screen using the search icon.
- 2. Select "Inquiries (My Office)"

CalMHSASmartcareTrain ≡ SmartCare	<mark>↓ 69-31-2022</mark> Q ★ ▲
≗ ⊞ ≔	QInq
CANE Departing Depart Summe	S Inquiries (My Office)
CR CANS Reporting Record Summa	S Client Inquiries (Client)
	() Westerne All Marketenne

3. This will bring you to the Inquiries list page. **Create a new inquiry** by using the new icon.

	ctt.smartcarenet.com/Callv ASmartcareTrain 09-21-202		rtcare ira	iin/baserages/Applicat	ion.aspx?ccsci	a=20000	2=01/06	o/20255550Q	LOADFORFOSTBACK				LI W
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≗ <u>¤</u> ∷	Inquiries (162)											• ••
My Office >											- 3		
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Administration													
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ppointment Search 🛛 🛇	Tax, Registration	<u>1220</u>		Test, Regimention	<u>1/3/2023</u>	10:13 AM	Rowe,	Charla				In Progress	\$
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	Rents, Teat	<u>1196</u>		April, Tax	12/27/202	22 1:44 PM	Sulliva	n, Kevin				In Progress	;
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	Roberts, Long	<u>1192</u>		Roberts, Colly	12/26/202	22 9:49 PM	Willian	ns, LaQuita				In Progres	?
	Tax Cont	1190		Test Cont	12/23/202	2 4:13 PM	Rowe.	Charla				Complete	

4. This will bring up the client search window. You may search to determine if the person is a current client. If person is a new client, or you cannot find them in the system, click "Inquiry (New Client)".

ent Search							?
Clear ame Search 🗌 In	nclude Client Conta	cts 🗌 Only Include Act	tive Clients (Checking w	rill not allow c	ption to crea	te new Client)	
Broad Search	Narrow Search	Type of Client OInc	dividual 🔵 Organizatio	n All Clier	nt Search		
Last Name		First Name		Program		~	
ther Search Strate	egies						
SSN Search			Phone # Search				
DOB Search			Master Client ID S	earch			
Primary Clinician	Search	~	Client ID Search				
Authorization II)/#		Insured ID Search				
ecords Found							
ID Master	ID Client Name	△ <u>Chosen Name</u>	SSN/EIN DOB	<u>Status</u>	<u>City</u>	Primary Clinician	
		No dot	a to display				
		NO GAL	α το σιορταγ				
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					Sel	ect Cance	
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a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc. If you find the person in the system, meaning they show in the Records Found section, click "Select" to bring their information into the Inquiry screen.

Client Search	? 🛛
Clear	
Name Search Include Client Contacts Only Include Active Clients (Checking will not allow op	otion to create new Client)
Broad Search Narrow Search Type of Client • Individual Organization All Client	t Search
Last Name Program	~
Other Search Strategies	
SSN Search Phone # Search	
DOB Search 🗰 🔻 Master Client ID Search	
Primary Clinician Search Client ID Search	
Authorization ID / # Insured ID Search	
Records Found	
ID Master ID Client Name Chosen Name SSN/EIN DOB Status	City Primary Clinician
	^
No data to display	
	-
 (1) 	a 💦 🔸
	Select Cancel
	Inquiry (New Client)

- 5. This brings you to the Inquiry Details screen. Complete the information about the person requesting services, or "Inquirer".
 - a. Make sure to input the date and time you received the referral in Start Date and Start Time. There are buttons for "T" (today) and "Now" to help make this quick and easy.

	formation 🗌 Cris	is						
Relation To Cl	ient Self	~	First Name Manua	ıl Mide	dle Name	Last	Name Training	
Call Back	(916) 555-7878		Ext	a Ema	ul			
Start Date	01/06/2023	г ү 🖮 🕶	Start Time 05:16	PM Now				
	-	_						
Client Info	ormation (Potenti	al)						
First Name	Manual	Middle Name	•	Last Name	Training	Client ID	Sex	Male 🗸
SSN		SSN Unkn	own/Refused	DOB	06/07/2002 🛗	▼ Age (20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell		Email				
	0	Clie	ent is chronically	Urgency Level ★				~
Client is not homeless	homeless							
homeless	nometess			Inquiry type				~
homeless Address1	nometess			Inquiry type Contact type 🔸				* *
Client is not homeless Address1 Address2 City								
homeless Address1 Address2		Zip	Ca	Contact type 🔸	Search here		٩	~

b. To complete the rest of the referring agency's information, navigate to the Referral Resource section further down on the page. Your county may choose to leave the inquirer information blank and simply enter the agency information, along with contact person, in this section. This section's information currently does not show on the list page, however.

Referral Resource						
Referral Date	🛗 🔻 Referral	Туре	✓ Refer	ral Subtype	~	
Organization Name			Phone	9		
First Name			Last N	lame		
Address Line 1			Addre	ss Line 2		
City	State	✓ Zip	Email			
Comments						

6. Complete the information about the potential client.

- a. **Complete the First Name and Last Name fields.** Middle Name is not required but can be added as necessary.
- b. **Complete the SSN and DOB fields.** This is for the client's social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or doesn't know, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN".
- c. Complete the Sex field.
- d. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.
- e. Click Save.

Call Back (916) 555-7878 Ext Email Start Date 01/06/2023 T Y > Start Time 05:16 PM Now Client Information (Potential) First Name Manual Middle Name Last Name Training Client ID Sex SSN Image: SSN Unknown/Refused DOB 06/07/2002 Image: Age (20 Years) Media		
Start Date 01/06/2023 Image: Start Time 05:16 PM Now Client Information (Potential) First Name Manual Middle Name Last Name Training Client ID Sex SSN Image: SSN Unknown/Refused DOB 06/07/2002 Image: Age (20 Years) Media		Sex Male
Client Information (Potential) First Name Middle Name Last Name Training Client ID Sex SSN SSN Unknown/Refused DOB 06/07/2002 Tage (20 Years) Media		Sex Male
First Name Manual Middle Name Last Name Training Client ID Sex SSN SSN Unknown/Refused DOB 06/07/2002 Training Media		Sex Male
First Name Manual Middle Name Last Name Training Client ID Sex SSN ✓ SSN Unknown/Refused DOB 06/07/2002 ➡ < Age (20 Years) Media		Sex Male
SSN SSN Unknown/Refused DOB 06/07/2002		Sex Male
	Age (20 Years) Medi-Cal ID	Medi-Cal ID
Home Phone (916) 555-7878 Cell Email		
Client is not Client is chronically Urgency Level Not urgent		
Address1 Inquiry type Request for services/screening		`
	3/screening	
	s/screening	•
. Horry optiation	s/screening	```````````````````````````````````````
State V Zip County of Residence Search here		
	s/screening	•

Urgency Level	Description/Use Case	Timelines
Emergent	Use if the referral is an emergency	Addressed immediately
Not Urgent	Use if the referral is a routine request for services	Appointment within 10 business days
Urgent	Use if the referral is an urgent request for services	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the referral is a request for new services
Crisis	Use when the referral is for crisis services
Information	Use when the referral is for information
Discharge/Transition	Use when the referral is for another provider to coordinate transition of care
Coordination	to/from your agency
Jail Diversion	Use when the referral is related to Jail Diversion programs
Consultation	Use when the referral is for an outside provider seeking a consultation
Other	Use when the referral is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

7. Select the "Link/Create Client" button. This will bring up the client search window, with a few extra buttons at the bottom.



- a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
- b. You must also search by SSN and DOB by clicking on those respective buttons.

ient Search							?
Clear Name Search	Include Client Cont	acts 🗌 Only Include Act	ive Clients (Checking wi	ill not allow op	otion to creat	e new Client)	
Broad Searc	h Narrow Search	Type of Client OInc	lividual Organizatior	All Clien	t Search		
a Last Name	Training	First Name	anual	Program		~	
Other Search St	rategies						
SSN Searc DOB Searc Primary Clinic Authorizatio	h 06/07/2 :ian Search	99 9999 002 🚔 🕶	Phone # Search Master Client ID Se Client ID Search Insured ID Search				
	ster ID <u>Client Name</u>	△ <u>Chosen Name</u>	SSN/EIN DOB	Status	<u>City</u>	Primary Clinician	1
		No data	to display				
					Sele	ect Canc) el
					C	reate New Client R	ecor

c. If no records are found based on the search you do, an alert will show at the top of the window.

Broad Sear	rch Narro Training	w Search	Type of Client •	Individual 🔵 Org Manual	anization All Program	Client Search	~
ner Search S	trategies						
SSN Sear	ch	999 99	9999	Phone # 5	Search		
DOB Sear	ch	06/07/2002	2 🛗 🕶	Master Cli	ent ID Search		
Primary Clini	ician Search		~	Client ID	Search		
Authorizati	ion ID / #			Insured II) Search		
cords Found							
ID Ma	aster ID Clie	nt Name	△ Chosen Name	SSN/EIN	OOB Stat	us <u>City</u>	Primary Clinician
			No.s	data to display			

- d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
- e. If the person is already a client in the system, select the button next to the appropriate record.
- f. Click "Select" to link the Inquiry to the selected client.
- g. If the person is not a client, meaning no records were found matching the client's information, **click** "Create New Client Record."

		h 🗌 Inclu	de Client Contacts	Only Include	Active Clients (0	Checking will	not allow o	ption to creat	e new Client)
	Broad	Search	Narrow Search Ty	pe of Client 💽	Individual 🔿 C	Organization	All Clier	nt Search	
	Last Nam	e Tra	ining	First Name	Manual		Program		~
Oth	er Searc	h Strategi	es						
	SSN S	earch	999 99	9999	Phone	# Search			
	DOB 9	Search	06/07/2002	⇔ -	Master (Client ID Sear	ch		
	Primary	Clinician Sea	rch	~	Client I	ID Search			
		ization ID / #			Insured	ID Search			
Rec	ords Fou	ınd							
	<u>ID</u>	Master ID	<u>Client Name</u> △	Chosen Name	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Primary Clinician
0	1234	1234	Apple Patrice -		9999	08/29/19	Active		
\bigcirc	1 e	1081	Roberts, Star		9999	09/17/19	Active		
\cup	1072	1072	Anderson, Bolt		9999	03/03/19	Active		
0	1209	1209	Roothan, Tanti		9999	10/10/19	Active	heavyton	
0		1096	Augers, Same		9999	08/01/19	Active		Clinician, Robert
00000	1096				9999	05/27/19	Active	Test	
000000		1007	Rental Intelligence		7777	00/2//1/			

h. This will take you back to the Inquiry screen but now a client ID number will be added.

Inquirer In	formation 🗌 Cris	is								
Relation To Cli	ent Self	~	First Name	Manual	4	4iddle Name		Last I	Name Training	
Call Back	(916) 555-7878		Ext			mail				
Start Date	01/06/2023			5:16 PM	Now					
Client Info	rmation (Potenti	al)								
First Name	Manual	Middle Nam			Last Name	Training		t ID <u>1239</u>	Sex	Male
SSN	999999999	SSN Unk	nown/Refuse	d	DOB	06/07/2002	2 📄 🕆 Age ()	20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell			Email					
Client is not comeless	Client is homeless	Cli homele	ent is chronica ess	lly	Urgency Level	Not urgent				``
Address1					Inquiry type	Request for s	services/screeni	ng		•
Address2					Contact type	Call				```
Dity				Pric	ority Population					
State	~	Zip		Count	y of Residence	Search here	2			
Presenting Pro	blem				Current Client	Information (If	any)			
					Client Id: 12	20				

- 8. Click on the "Insurance" tab.
 - a. Select "Medi-Cal" from the "Payer" drop-down and enter the client's Medi-Cal number (CIN) in the "Insurance ID" field. Click "Verify" to verify the client's Medi-Cal insurance.

Inquiry Detai	ls		Remove Client Lin	k Link/Create Clier	nt Register Client 🔅	i /	^₿ 💼	8	Save	×
Initial Insura		ographics								
Electronic Elig	ibility Verifi	ication	а							
Payer	~	Insurance Id	Verify							
Coverage Info	rmation 🔽	Show Current Plan	s Only							
Plan			Insured ID	Group ID	Comment					
Coverage Informat	tion								Add	

- 9. Click on the "Demographics" tab.
 - a. We recommend **completing the "Gender Identity" and "Pronoun" fields** to ensure the person is not misgendered as additional staff engage with the client.

iquiry Details	9		Remove Client Link Link,	/Create Client Register Clie	nt 🌣 i	^₿	Save
Initial Insurance	Demographics						
General Information							
Primary Care Coordinator		✓ Medical Provider	~	Professional Suffix			Active
Prefix		✓ Suffix	~	•			
Identifying Information	on						
	~	Gender Identity	~	Sexual Orientation			~
Marital Status	~ ₩ ~	Gender Identity Cause of Death		Sexual Orientation			~
Marital Status		L		a)	o provide		

b. **Complete the "Primary/Preferred Language" field.** If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.

nquiry Details			Remove Client Link	Link/Create Client	Register Client	i 🖧	ē ⊖	Save
Initial Insuran Employment Information	e Demographics							
Language Primary/Preferred L Interpreter Serv		•	Client does not speak	b English Hispanio	: Origin		~	
Transportation I		service animal, high	rise)					
Preferences Communication Preference Days Geographic Location Comment	M T W Th F		Mobile Phone Provider		~			
								2

- 10. You may enter any additional information in any of the tabs, but none are required. Once complete, **enter the end date and time of the Inquiry and change the status to "Complete".** Once again, there are "T" (today) and "Now" buttons to make this easier.
- 11. Click Save. You may now close the Inquiry and move on to Screening.

Linitial Insurance Demographics Disposition Disposition Disposition Select Disposition Select Service Type Select Provider/Agency Add Service Type Disposition Comments Disposition Status In Progress Add Date Y @ End Time Y @ End Time Y @ Yes Y @ Yes Y Yes </th <th>quiry Deta</th> <th>ils</th> <th>Guide Menu</th> <th></th> <th></th> <th>Rem</th> <th>ove Client</th> <th>Link</th> <th>Link</th> <th>:/Create Client</th> <th>Reg</th> <th>gister Client</th> <th>\$ i</th> <th>^₿ 🚺</th> <th>ī 🖯</th> <th>🖬 Sar</th> <th>ve</th> <th>×</th>	quiry Deta	ils	Guide Menu			Rem	ove Client	Link	Link	:/Create Client	Reg	gister Client	\$ i	^₿ 🚺	ī 🖯	🖬 Sar	ve	×
Injecting Drugs Ves No Unknown Pregnant Ves No Unknown Not Applicable Disposition Select Disposition Select Service Type Select Provider/Agency Add Provider Add Service Type Disposition Comments Disposition Screening Comment - Include Follow Up and Contact Information Screening Comment - Include Follow Up and Contact Information	Initial Insu	rance	Demograpi	nics											1	1		
Injecting Drugs Ves No Unknown Pregnant Ves No Unknown Not Applicable Disposition Select Disposition Select Service Type Select Provider/Agency Add Provider Add Service Type Assigned Staff Disposition Comments Screening Comment - Include Follow Up and Contact Information Screening Comment - Include Follow Up and Contact Information Information	SUD	() Ye	es () No	• N	ot Evaluated		Client is se	eeking s	service	es								
Pregnant Ves No Unknown Not Applicable Disposition Select Disposition Select Provider/Agency Add Provider Add Service Type Assigned Staff Disposition Screening Comment - Include Follow Up and Contact Information Additional Waitist information Additional Waitist information									~									
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Add Service Type Assigned Staff Assigned Staff Disposition Comments Add Disposition Screening Comment - Include Follow Up and Contact Information Additional Waitlist information 10	Se										~							
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Disposition Comments Add Disposition Screening Comment - Include Follow Up and Contact Information Additional Waitlist information			<u></u>					٨		Assigned Work(Group							
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Screening Comment - Include Follow Up and Contact Information Additional Waitlist information																		
Screening Comment - Include Follow Up and Contact Information Additional Waitlist information																		1
	Add Dispos	ition																
	Screening Comn	nent - I	include Follow l	Up and C	ontact Inform	mation		Ad	ditiona	al Waitlist infor	mation							
End Date T Y 🖮 - End Time Now Status In Progress												10						
	End Date		ТҮш⊤	End Tir	ne	Nov	v Status	In Prog	ress								~	

What do I do when someone walks in for an assessment?

Walk-in assessments can skip the Inquiry and Screening steps and go straight to Intake and Assessment.

What do I do if someone calls a non-crisis line and says they're in crisis?

When someone calls a non-crisis line saying they're in crisis, transfer them immediately to crisis services per your county's policies and procedures. It's ok if you've started an inquiry. Simply save the inquiry. The crisis services staff can continue the inquiry from their computer.

What do I do if someone calls requesting services, but I don't provide crisis or screening services?

Even if you don't provide screening or crisis services, you can still document the request for services. This is done on the Inquiry screen.

- 1. Search for the Inquiry screen using the search icon.
- 2. Select "Inquiries (My Office)"



3. This will bring you to the Inquiries list page. Create a new inquiry by using the new icon.

	nartcarenet.com/CalM rtcareTrain 09-21-2022	_	rtcareTrain/Ba	asePages/Applic	ation.aspx?8	kscld=28&tim	e=01/0	5/20235530&	LoadForPostBack				* 🗆
SmartCare Q	k ★ 🚢									= ¶ ≰	' 'D ?	Acces	s Staff
🛄 🗄 Ir	nquiries (162)										☆★ 🕹		шн
My Office >											- 3		
Client >	Recorded By All	~	Assigned To	All	✓ All Dispo	sitions	~	All Status	~	All Inquiry	Туре	~	Apply Filt
	All Programs	~	All Locations	3	✓ All Urger	icy Level	~	All Contact T	/pe 🗸	All Priority	Population	~	
Program >	From 01/01/1900	iii -	To 12/31/9	999 🛗 🕶	Last Nar	ne		First Name		Phone			
Administration													
	Client (Potential)	Client	Id In	quirer	Start I	Date/Time ⊽	Reco	ded By	Assigned To	Dispo	osition	Inquir	y Status
SmartLinks	Time, Array	<u>1223</u>	-		1/4/20	23 10:30 AM	Clinici	an, Robert				In Prog	ress
intment Search 🛛 🛇	her, Regimention	<u>1220</u>		Augurnation 1	1/3/20	23 10:13 AM	Rowe,	Charla				In Prog	ress
	Name and Address		-		1/1/20	23 10:53 AM	Clinici	an, Robert				In Prog	ress
	Classes, Tyliger	<u>1217</u>		Second, Tryings	<u>12/30/</u>	2022 2:06 PM	1 Williar	ns, LaQuita				In Prog	ress
	Charles, Proc.	<u>1216</u>		and the	<u>12/30/</u>	2022 8:56 AM	1 Williar	ns, LaQuita				In Prog	ress
	Inc. Robert	<u>1215</u>		Reflection of the	<u>12/29/</u>	2022 3:21 PM	1 Staff, /	Access				In Prog	ress
	last, Yosawilla	<u>1214</u>		1000	<u>12/29/</u>	2022 2:58 PM	Clinici	an, Robert				Comple	ite
	100.00	<u>1213</u>			<u>12/29/</u>	2022 12:04 P	<u>∧</u> Fitzge	rald, John				In Prog	ress
	todesen, firmite	<u>1209</u>		eren, braile	<u>12/29/</u>	2022 8:25 AM	1 Staff, /	Access				In Prog	ress
	her, lange	<u>1208</u>		in the second	<u>12/29/</u>	2022 8:17 AM	1 Rowe,	Charla				In Prog	ress
	fast, Orio	<u>1207</u>			<u>12/28/</u>	2022 5:02 PM	1 Rowe,	Charla	Clinician, Rober	t		In Prog	ress
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	fast, lassing	<u>1206</u>		. Institut	<u>12/28/</u>	2022 12:55 P	Clinici	an, Robert				In Prog	ress
	lateres, file	<u>1203</u>		era, fie	<u>12/28/</u>	2022 8:44 AM	1 Williar	ns, LaQuita				In Prog	ress
	las, lassrage	<u>1201</u>			<u>12/27/</u>	2022 4:10 PM	1 Clinici	an, Robert				In Prog	ress
	ACCESS, MICHAEL	<u>1200</u>			12/27/	2022 4:01 PM	1 Fitzge	rald, John				In Prog	ress
	tern, feet	<u>1196</u>		n, 166	<u>12/27/</u>	2022 1:44 PM	1 Sulliva	n, Kevin				In Prog	ress
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	preparation, pro-	<u>1195</u>		Decorrent, pa	12/27/	2022 1:18 PM	1 Fitzge	rald, John	Sullivan, Kevin			In Prog	ress
	laster, Regular	<u>1194</u>		n, fegate	12/27/	2022 1:12 PM	1 Staff, /	Access				Comple	ete
	Roberts, Colly	<u>1192</u>		arts, Catty	12/26/	2022 9:49 PM	1 Williar	ns, LaQuita				In Prog	res 🤈
	test from	1190		- Trans.	12/23/	2022 4:13 PM	Rowe.	Charla				Comple	

4. This will bring up the client search window. You may search to determine if the person is a current client. If person is a new client, or you cannot find them in the system, click "Inquiry (New Client)".

nt Search								6
Clear ame <mark>Searc</mark>	ch 🗌 Inclu	ude Client Contac	ets 🗌 Only Include Act	ive Clients (Checkin	g will not allow o	option to crea	ate new Client)	
Broad	Search	Narrow Search	Type of Client 💿 Inc	lividual 🔿 Organiza	ation All Clie	nt Search		
Last Nam	ne		First Name		Program		~	
her Searc	ch Strategi	es						
SSN	Search			Phone # Searc	:h			
DOB	Search		 	Master Client I	D Search			
Primary	Clinician Sea	rch	~	Client ID Sear	ch			
Author	rization ID / #	#		Insured ID Sea	rch			
cords Fou	und							
ID	Master ID	Client Name	△ <u>Chosen Name</u>	SSN/EIN DOB	Status	<u>City</u>	Primary Clinician	
								i
			No. doto	te d'autou				
			NO data	a to display				
						C .	elect Cancel	
						5e	4 Cancel	

a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc. If you find the person in the system, meaning they show in the Records Found section, click "Select" to bring their information into the Inquiry screen.

Client Search	? 🛛
Clear	
Name Search Include Client Contacts Only Include Active Clients (Checking will not allow op	otion to create new Client)
Broad Search Narrow Search Type of Client • Individual Organization All Client	t Search
Last Name Program	~
Other Search Strategies	
SSN Search Phone # Search	
DOB Search 🗰 🔻 Master Client ID Search	
Primary Clinician Search Client ID Search	
Authorization ID / # Insured ID Search	
Records Found	
ID Master ID Client Name Chosen Name SSN/EIN DOB Status	City Primary Clinician
	^
No data to display	
	-
 (1) 	a 💦 🔸
	Select Cancel
	Inquiry (New Client)

- 5. This brings you to the Inquiry Details screen. Complete the information about the caller, or "Inquirer".
 - a. If the client is requesting services for themselves, select "Self" under "Relation to Client." This way, as you enter the caller's information, it will push this information automatically into the "Client Information" section.
 - b. Make sure to input the start date and time of the call. There are buttons for "T" (today) and "Now" to help make this quick and easy.

Relation To Client Self ✓ First Name Call Back (916) 555-7878 Ext	Manual	iddle Name	Last Nar	Testata a	
Call Back (916) 555-7878 Ext	1000			me Training	
	Er	mail			
Start Date 01/06/2023 TY 🛗 🗸 Start Time	05:16 PM Now				
Client Information (Potential)					
client Information (Fotential)					
First Name Manual Annual Manuel Name	Last Name	Training	Client ID	Sex	Male 🗸
SSN SSN SSN Unknown/Refuse	d DOB	06/07/2002 🛗 🕶	Age (20 Years)	Medi-Cal ID	
Home Phone (916) 555-7878 Cell	Email				
Client is not Client is Client is chronical homeless homeless homeless	Urgency Level	*			~
Address1	Inquiry type				~
Address2	Contact type	*			~
City	Priority Population				~
State V Zip	County of Residence	Search here		 ♠	

- 6. Complete the information about the potential client.
 - a. **Complete the First Name and Last Name fields.** Middle Name is not required but can be added as necessary.
 - b. **Complete the SSN and DOB fields.** This is for the client's social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or doesn't know, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN". These fields can be changed in the future if necessary.
 - c. Complete the Sex field. This field can be changed in the future if necessary.
 - d. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.
 - e. Click Save.

Relation To Cl	ient Self	~	First Name	Manual	Ν	fiddle Name		Last M	lame Training		
Call Back	(916) 555-7878		Ext	manuat		inail		Edot	ianie Iraning		
Start Date		ТҮШт	Start Time	05-16 PM		-ment					
Start Date	01/00/2023		start fille	00.101.01	NOW						
											_
Client Info	ormation (Potenti	al)									-
	ſ	1									1
First Name	Manual	Middle Nam			Last Name	Training		lient ID	Sex	Male	~
SSN		SSN Unk	nown/Refuse	ed	DOB	06/07/2002	🛗 🔻 A	ge (20 Years)	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell			Email						
Client is not	Client is	0	ient is chronica	lly	Urgency Level	l Not urgent				~	ה
homeless Address1	nometess	homele	ess		Inquiry type	Request for ser	viene leer				
							vices/sci	eening			-1
Address2					Contact type	Call				`	<u> </u>
City				Pric	ority Population						~
State	~	Zip		Count	ty of Residence	Search here					
Presenting Pre	oblem				Current Client	Information (If an	y)				

Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition	Use when the reason for the call is for another provider to coordinate transition
Coordination	of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

7. Select the "Link/Create Client" button. This will bring up the client search window, with a few extra buttons at the bottom.



- a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
- b. You must also search by SSN and DOB by clicking on those respective buttons.

ient Search							?
Clear Name Search	Include Client Cont	acts 🗌 Only Include Act	ive Clients (Checking wi	ill not allow op	otion to creat	e new Client)	
Broad Searc	h Narrow Search	Type of Client OInc	lividual Organizatior	All Clien	t Search		
a Last Name	Training	First Name	anual	Program		~	
Other Search St	rategies						
SSN Searc DOB Searc Primary Clinic Authorizatio	h 06/07/2 :ian Search	99 9999 002 🚔 🕶	Phone # Search Master Client ID Se Client ID Search Insured ID Search				
	ster ID <u>Client Name</u>	△ <u>Chosen Name</u>	SSN/EIN DOB	Status	<u>City</u>	Primary Clinician	1
		No data	to display				
					Sele	ect Canc) el
					C	reate New Client R	ecor

c. If no records are found based on the search you do, an alert will show at the top of the window.

Broad Sear	rch Narro Training	w Search	Type of Client •	Individual 🔵 Org Manual	anization All Program	Client Search	~
ner Search S	trategies						
SSN Sear	ch	999 99	9999	Phone # 5	Search		
DOB Sear	ch	06/07/2002	2 🛗 🕶	Master Cli	ent ID Search		
Primary Clini	ician Search		~	Client ID	Search		
Authorizati	ion ID / #			Insured II) Search		
cords Found							
ID Ma	aster ID Clie	nt Name	△ Chosen Name	SSN/EIN	OOB Stat	us <u>City</u>	Primary Clinician
			No.s	data to display			

- d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
- e. If the person is already a client in the system, select the button next to the appropriate record.
- f. Click "Select" to link the Inquiry to the selected client.
- g. If the person is not a client, meaning no records were found matching the client's information, **click** "Create New Client Record."

	Broad S	earch I	Narrow Search T	ype of Client 💿	Individual 🔾 C	Organization	All Clier	nt Search	
	Last Name	e Trai	ining	First Name	Manual	F	Program		~
Oth	er Searcl	n Strategi	es						
	SSN S	earch	999 99	9999	Phone	# Search			
	DOB S	earch	06/07/2002	₩ -		Client ID Sear	ch		
	Primary (linician Sea		~		ID Search			
					Client.				
		zation ID / #				ID Search			
Rec	Authori ords Fou <u>ID</u>	zation ID / #			Insured	ID Search	Status	<u>City</u>	Primary Clinician
Rec	ords Fou	zation ID / # nd			Insured	ID Search		<u>City</u>	Primary Clinician
	ords Fou ID	zation ID / # nd <u>Master ID</u>			Insured SSN/EIN	ID Search	Active	<u>City</u>	Primary Clinician
	ords Fou ID 1234	zation ID / # nd <u>Master ID</u> 1234			SSN/EIN 9999	ID Search <u>DOB</u> 08/29/19	Active Active	<u>City</u>	Primary Clinician
	ID 1234 1 C	zation ID / # nd <u>Master ID</u> 1234 1081			Insured SSN/EIN 9999 9999	ID Search DOB 08/29/19 09/17/19	Active Active Active	<u>City</u> heavyton	Primary Clinician
	ords Fou ID 1234 1 C 1072	zation ID / # nd <u>Master ID</u> 1234 1081 1072			Insured <u>SSN/EIN</u> 9999 9999 9999	DOB 08/29/19 09/17/19 03/03/19	Active Active Active Active)	Primary Clinician
	ords Fou 1234 1 e 1072 1209	zation ID / # nd <u>Master ID</u> 1234 1081 1072 1209			Insured SSN/EIN 9999 9999 9999 9999 9999 9999 9999 9999 9999	DOB 08/29/19 09/17/19 03/03/19 10/10/19	Active Active Active Active Active)	

h. This will take you back to the Inquiry screen but now a client ID number will be added.

nquirer In	formation 🗌 Cris	is									
Relation To Cl	ient Self	~	First Name	Manual	Ν	1iddle Name		Last Na	me Training		
Call Back	(916) 555-7878		Ext		E	mail					
Start Date	01/06/2023	Γ Y ⊞ -	Start Time	5:16 PM	Now						
Client Info	ormation (Potenti	al)					h				
irst Name	Manual	Middle Nam	e		Last Name	Training	Client I	D <u>1239</u>	Sex	Male	•
SN	999999999	SSN Unk	nown/Refuse	d	DOB	06/07/2002	. 🗎 🕆 Age (20) Years)	Medi-Cal ID		
lome Phone	(916) 555-7878	Cell			Email						
Client is not omeless	Client is homeless	Cli homele	ent is chronica ess	lly	Urgency Level	Not urgent					~
Address1					Inquiry type	Request for s	ervices/screening	ŝ			~
Address2					Contact type	Call					~
City				Pric	ority Population						•
State	~	Zip		Count	y of Residence	Search here			₫		
Presenting Pro	oblem				Current Client	Information (If a	any)				
					Client Id: 123	39					

- 8. Click on the "Insurance" tab.
 - a. Select "Medi-Cal" from the "Payer" drop-down and enter the client's Medi-Cal number (CIN) in the "Insurance ID" field. Click "Verify" to verify the client's Medi-Cal insurance.

Inquiry Detai	ls		Remove Client Lin	k Link/Create Clier	nt Register Client 🔅	i /	^₿ 💼	8	Save	×
Initial Insura		ographics								
Electronic Elig	ibility Verifi	ication	а							
Payer	~	Insurance Id	Verify							
Coverage Info	rmation 🔽	Show Current Plan	s Only							
Plan			Insured ID	Group ID	Comment					
Coverage Informat	tion								Add	

- 9. Click on the "Demographics" tab.
 - a. We recommend **completing the "Gender Identity" and "Pronoun" fields** to ensure the person is not misgendered as additional staff engage with the client.

iquiry Details	9		Remove Client Link Link,	/Create Client Register Clie	nt 🌣 i	^₿	Save
Initial Insurance	Demographics						
General Information							
Primary Care Coordinator		✓ Medical Provider	~	Professional Suffix			Active
Prefix		✓ Suffix	~	•			
Identifying Information	on						
	~	Gender Identity	~	Sexual Orientation			~
Marital Status	~ ₩ ~	Gender Identity Cause of Death		Sexual Orientation			~
Marital Status		L		a)	o provide		

b. **Complete the "Primary/Preferred Language" field.** If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.

nquiry Details		Remove Client Link	Link/Create Client Re	gister Client 🔹	i ^\$	Save
Initial Insurance Demo Employment Information	ographics					
Language Primary/Preferred Language Interpreter Services Needed	v	Client does not speak E	b Hispanic Origin			~
Transportation Informatio	on odations (e.g. wheelchair, service anim	al, high rise)				
Preferences Communication Preference Days M T Geographic Location Comment	▼ W Th F	Mobile Phone Provider		v		
						2

- 10. You may enter any additional information in any of the tabs, but none are required. Once complete, **enter the end date and time of the Inquiry.** Once again, there are "T" (today) and "Now" buttons to make this easier. **Leave the status as "In Progress".**
- 11. Click Save. You may now close the Inquiry. Your Access Team will likely have procedures to monitor the Inquiries list page to address any that are in progress. If your county does not have these procedures, we recommend that you notify the appropriate person per your county's procedures.

quiry Deta	ails Guide	Menu		Remove Clien	t Link Li	nk/Create Client	Register Client	¢ i	AB		Save
nitial Insu	irance De	mographi	cs							11	
UD	() Yes	⊖ No	Not Evaluated	Client is	seeking serv	ices					
					```	/					
njecting Drugs	<u> </u>	O No	Unknown								
regnant	Ves (	🔵 No	Unknown	Not Appl	icable						
isposition											
Select Disp	position					~					
Se	elect Service Ty	pe					~				
	Select P	rovider/Age	ency				~				
	Add Prov	/ider									
Ad	Id Service Type	2									
Assigned S	Staff					Assigned WorkGr	oup				~
Disp	osition Comme	ents									
Add Dispos	sition										
		Follow U	o and Contact Info	rmation	Additio	onal Waitlist inform	ation				
		Follow U	o and Contact Info	rmation	Additio	onal Waitlist inform	ation				
		Follow U	o and Contact Info	rmation	Additio	onal Waitlist inform	ation				
		Follow U	o and Contact Info	rmation	Additio	onal Waitlist inform	ation				
		Follow U	o and Contact Info	rmation	Additio	onal Waitlist inform					
	ment - Include	Follow U		rmation	Additio	nal Waitlist inform	ation				

### How can I view requests for services that are pending?

Viewing all inquiries, both completed and pending, is done in the Inquiries list page.

- 1. Search for the Inquiry screen using the search icon.
- 2. Select "Inquiries (My Office)"

CalMHSASmartcareTrai	
<b>≜</b> <u>∎</u> ≡	QInq
	S Inquiries (My Office)
CR CANS Reporting Record Summa	2 S Client Inquiries (Client)
	All Marketaura

- 3. This will bring you to the Inquiries list page. Use the filters as necessary, such as filtering the status to show only "In Progress". The "Recorded By" column indicates who created the inquiry. The
- 4. To see the details of an inquiry, click on the link in the "Start Date/Time" column.

	nartcareTrain   09-21-2022	_	icare namy ba	iserages/App	Jicati	on.aspx?&scld=28&time	-01/0	o/2023555000	.oadForPostback:	= 1# MIS	<b>0-</b> 0. E	☆ :	
		3								<b>e</b> (	° D ?	Acces	s Staff •
	Inquiries (162)										☆★ ≵	. 🗅 🏟	⊞⁺⊞
My Office >													
Client >	Recorded By All	~	Assigned To	All	~	All Dispositions	~	All Status	~	All Inquiry	/ Туре	~	Apply Filt
▶ Program     >	All Programs	~	All Locations	6	~	All Urgency Level	~	All Contact Ty	pe 🗸	All Priority	Population	~	
	From 01/01/1900	<b>.</b>	To 12/31/9	999 🛗 🕶		Last Name		First Name		Phone			
Administration										1			
	Client (Potential)	Client	Id Inc	quirer		Start Date/Time ⊽	Reco	rded By	Assigned To	Disp	osition	Inquin	y Status
SmartLinks	Hilm, Array	<u>1223</u>	-			1/4/2023 10:30 AM		an, Robert				In Prog	ress
pointment Search 🛛 🛇	Inst. Registration	<u>1220</u>	1.0	. Sugar and		1/3/2023 10:13 AM	4	Charla				In Prog	ress
	Pillan, Anna					<u>1/1/2023 10:53 AM</u>	CuritCi	an, Robert				In Prog	ress
	Citizense, Nyrapan	<u>1217</u>		Second, Tayl	-	12/30/2022 2:06 PM	Williar	ns, LaQuita				In Prog	ress
	Chinese, Proc.	<u>1216</u>		and the second		12/30/2022 8:56 AM	Williar	ns, LaQuita				In Prog	ress
	Test, Robert	<u>1215</u>	1.0	No.		12/29/2022 3:21 PM	Staff,	Access				In Prog	ress
	fact, frances	<u>1214</u>	1.0			12/29/2022 2:58 PM	Clinici	an, Robert				Comple	te
	100.01	<u>1213</u>				12/29/2022 12:04 P	Fitzge	rald, John				In Prog	ress
	Anderson, Arradia	<u>1209</u>	-	arner, ferral		12/29/2022 8:25 AM	Staff,	Access				In Prog	ress
	Test, Decige	<u>1208</u>	14	-		12/29/2022 8:17 AM	Rowe,	Charla				In Prog	ress
	fam, divis	<u>1207</u>	140			12/28/2022 5:02 PM	Rowe,	Charla	Clinician, Rober	t		In Prog	ress
	Barray, J., Taur	<u>1204</u>		mail, Team		12/28/2022 2:37 PM	Baize,	Jacob				Comple	te
	fast, Institut	<u>1206</u>	140			12/28/2022 12:55 PI	Clinici	an, Robert				In Prog	ress
	Cattoria, Da	<u>1203</u>	1.00	era, lin		12/28/2022 8:44 AM	Williar	ns, LaQuita				In Prog	ress
	fan, inversati	<u>1201</u>	1.0			12/27/2022 4:10 PM	Clinici	an, Robert				In Prog	ress
	ACCESS, MICHAEL	<u>1200</u>	100			12/27/2022 4:01 PM	Fitzge	rald, John				In Prog	ress
	Amon, Tant	<u>1196</u>	-	n, 164		12/27/2022 1:44 PM	Sulliva	ın, Kevin				In Prog	ress
	Postlac, Party		-	100.00		12/27/2022 1:27 PM	Sulliva	ın, Kevin				In Prog	ress
	(PROMOTION, 881).	<u>1195</u>		Charlen and	-	12/27/2022 1:18 PM	Fitzge	rald, John	Sullivan, Kevin			In Prog	ress
	Same, Register	<u>1194</u>	140	n, hapite		12/27/2022 1:12 PM	Staff,	Access				Comple	te
	Roberts, Long	<u>1192</u>				12/26/2022 9:49 PM	Williar	ns, LaQuita				In Prog	res
		1190				12/23/2022 4:13 PM	Rowe	Charla				Comple	to

5. Once in the Inquiry Details screen, you can assign the inquiry to a staff member by navigating to the "Inquiry Handled By" section and **use the "Assigned Staff" field**. This field shows on the Inquiries list page, meaning staff can sort by inquiries that are assigned to them.

Inquiry De	tails		Remove Client Link	Link/Create Client	Register Client	i ^	۵ 🎝
Initial In	surance Demographics						
Inquiry Ha	ndled By						
Recorded By	Charla Rowe	~	Information Gathered By	Charla Rowe		~	]
Program		~	Gathered By Other				5
Location		~	Assigned To			~	

# Life Cycle of the Client: Screening

Generally speaking, after a request for services is made, the client is screened to determine if they are appropriate for the types of services the county and its providers offer. There are three main screening tools used for this:

- Adult Medi-Cal Mental Health Screening Tool Created by DHCS, this tool is used to determine if an adult client (age 21+) is appropriate for Specialty Mental Health Services or if they'd be better served by one of the county's Managed Care Plans.
- 2. Youth Medi-Cal Mental Health Screening Tool Created by DHCS, this tool is used to determine if a youth client (age 0-20) is appropriate for Specialty Mental Health Services or if they'd be better served by one of the county's Managed Care Plans.
- 3. BQuIP SUD Screening Tool Commissioned by DHCS and created by UCLA, the Brief Questionnaire for Initial Placement, or BQuIP, is a screening tool that generates recommendations for initial placement for individual seeking treatment for substance use disorders.

Note: There are times a screening can be skipped and a client moved directly to the assessment phase. This is often the case for programs that work directly with partner agencies to expedite the access process. For example, Child Welfare Services may request an assessment on a foster youth without requiring a screening first. Review your county's policies and procedures for more details.

Most often, the screening will be completed when the client calls the county's Access Line. Most Access Line staff are trained to do a screening, or the client can be immediately transferred to someone who is trained. In some cases, however, a screening may be assigned to a staff member to complete after the initial call. For example, if the client calls the a number other than the Access Line.

### **Set up for Screening**

Before doing a screening tool, you need to enroll the client in a program. We recommend using an Access program for this.

- 1. To document the referral in SmartCare, you must first have the client open, then click the Search icon.
- 2. Type Client Programs into the search bar.
- 3. Click to select Client Programs (Client).



4. This takes you to the Client Programs list page. Click on the "new" icon.

≡	SmartCa		SmartcareTrain   09-21-202	<mark>2</mark> Training, Manual (	(1239) <b>+ ×</b>			🖆 🧳 🖱	? Robe	rt Clinician ・ <b>じ</b>		
-		≣	Client Program	: Programs (0) 😌 🛧 🖈 🕹 🛄 2								
1	My Office	>								4		
-	Client	>	All Programs		✓ All Statuses		✔ Other		~	Apply Filter		
Ľ	SmartLinks		Program	Status E	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS		
						No data to display	,					

- 5. Select the program your county uses for screening services.
- 6. Change the Status to "Enrolled".
- 7. Enter the Enrolled Date.
- 8. Click Save.

Program Ass	signment Details				¢	i	AB i		Save	×
Program Assign	ment									
General		5		6						•
Program Name	~		Primary	Current Status					~	L
Client	Training, Manual									L
Assigned Staff	~			Requested Date				<b>*</b>		L
				Enrolled Date				<b>₩ *</b>		L
Comment				Discharged Date				<b>*</b>		L
				Next Schedule Service						L
				Jervice						

### How do I complete an Adult Medi-Cal Screening Tool?

- 1. You must first have the client open, then click the Search icon.
- 2. Type Adult Medi-Cal Screening Tool into the search bar.
- 3. Click to select Adult Medi-Cal Screening Tool (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.



6. The Adult Medi-Cal Screening Tool document will open. Complete the document.

A	dult Medi-Cal Screening Tool		ľ	: 10	0	GoTo 💄	۵, ۵	80	Save	×
	Effective 01/18/2023 To Status New Author Sta	iff, Access	~		0	Ð		Sign	•	-
	Adult Medi-Cal Mental Health Screening Tool									
	1. Is this an emergency or crisis situation?	⊖Yes ⊖No								L
	2. Can you tell me about the reason you are seeking mental health services today?									l
	3. Are you currently receiving mental health treatment?	◯Yes ◯No								L
	4. Have you ever sought help before today for your mental health needs?	⊖Yes ⊖No								L
	5. Are you currently taking, or have you ever taken, any prescription mental health medication?	⊖Yes ⊖No								L
	6. Are you without housing or a safe place to sleep?	◯Yes ◯No								L
	7. Are you having difficulties in important areas of your life like school, work, relationships, or housing, because of how you are feeling or due to your mental health?	⊖Yes ⊖No								l
	8. Have you recently had any changes or challenges with areas of your life, such as personal hygiene, sleep, energy level, appetite, weight, sexual activity, concentration, or motivation?	◯Yes ◯No								
	9. Have you completely withdrawn from all or almost all of your relationships, such as family, friends, or other important people?	⊖Yes ⊖No								
	10. Have you sought emergency treatment for emotional distress or been admitted to a psychiatric hospital in the past year?	⊖Yes ⊖No								

a. Any alerts will show at the top of the page.

A	Adult Medi-Cal Screening Tool	a
	😵 **** Please immediately proceed with existing emergency or crisis protocols ****	
	Effective 01/18/2023 Totatus New Author Staff, Access	
	Adult Medi-Cal Mental Health Screening Tool	
	1. Is this an emergency or crisis situation?	)No

b. Any recommendation will show at the bottom of the page.

Assessment Score and Summary	
	Total Score: 9
	Refer to MHP or directly to an MHP provider for a clinical assessment.

7. Click Sign to complete and generate the document.

Adult Medi-Cal Screening Tool	🗳 : 🎝 🖄 🖓 GOTO 🚢 🧞 🛅 🖨 🗅 🖬 Save 🗙
Effective 01/18/2023 🗮 Status New Author Staff, Access	
9. Have you completely withdrawn from all or almost all of your relationships, such as family, friends, or other important people?	. 🥑 🤨
10. Have you sought emergency treatment for emotional distress or been admitted Yes ONe to a psychiatric hospital in the past year?	
<ul> <li>11. In the past month, have you had thoughts about ending your life, wished you were dead, or wished you could go to sleep and not wake up?</li> <li>If "yes", then immediately coordinate referral to a clinician for further evaluation of suicidality after the screening is completed.)</li> </ul>	5
<b>12.</b> Have you recently engaged in any self-harming behavior like cutting or hurting yourself?	
13. Are you concerned about your current level of alcohol or drug use? • Yes ONe	
<b>14.</b> Has alcohol or any other drug or medication caused you to behave in a way that was dangerous to yourself or others (e.g., impaired driving, overdose, aggression, loss of memory, being arrested, etc.)?	2
(If "yes" to question 13 or question 14, then please offer and coordinate referral to the county behavioral health plan for substance use disorder assessment in addition to the mental health referral generated by the score.)	
Assessment Score and Summary	
Total Score: 9	
Refer to MHP or directly to an MHP provider f	for a clinical assessment.

## How do I complete a Youth Medi-Cal Screening Tool?

- 1. You must first have the client open, then click the Search icon.
- 2. Type Youth Medi-Cal Screening Tool into the search bar.
- 3. Click to select Youth Medi-Cal Screening Tool (Client).



4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.

#### 5. Click OK to continue.

CDAG Program Enrollment	<b>?</b> ×
Select Program Enrollment	4
MH Screening-10/03/2022	~
OK Cancel	

6. The Youth Medi-Cal Screening Tool document will open. **Complete the document**. The wording of the questions varies slightly depending on if you're screening the youth directly or gathering information from a parent or guardian. The system will automatically alter the language to match the appropriate DHCS form.

outh Medi-Cal Screening Tool	🗳 : 🎝 🖄 😌 😋 🗤 🌲 🧦 🛅 🖶 🗅 🖬 Save
Effective 01/18/2023	Staff, Access 🗸 Sign 💿 <
Youth Medi-Cal Screening Tool	
All fields marked with an asterisk * are required	
<ol> <li>Is this an emergency or crisis situation? *</li> <li>Are you calling about yourself or about someone else? *</li> </ol>	○ Yes ○ No ○ For Myself ○ For Someone Else
3. Can you tell me the reason for your call? *	
4. Are you currently or have you ever been in juvenile hall, on probation, or under court supervision? *	⊖Yes ⊖No
5. How old are you?*	
6. How many months since you last saw your pediatrician of primary care doctor?	~
7. Are you currently in foster care or involved in the child welfare system?	Yes No
8. Have you ever been in foster care of receiving child welfare services?	Ves No
9. Are you currently without housing or a safe place to sleep?	Ves No
<b>10.</b> Have you ever been without housing or a safe place to sleep?	○ Yes ○ No
11. Are you having thoughts, feeling or behaviors hat make it hard for you at home, school, or work?	Ves No
12. Are you having thoughts, feelings or behaviors that make it hard to be with your friends or have fun?	○Yes ○No
13. Are you often absent from school, work, or activities due to not feeling well?	● Yes ● No ?

a. Any alerts will show at the top of the page

outh Medi-Cal Sc	reening Tool		a						
S **** Please immediately proceed with existing emergency or crisis protocols ****									
Effective 01/18/2023	Status New	Author S	Staff, Access						
Youth Medi-Cal Scre	eening Tool								
All fields marked with an asterisk * are required									
1. Is this an emergency or	crisis situation? *	•	Yes 🔿 No						

b. Any recommendations will show at the bottom of the page.

Assessment Score and Summary										
	Total Score: 7	b								
	Refer to MHP Connect to MCP for a pediatrician visit Immediately refer to a clinician for evaluation on homicidality and/or suicidality after assessment Refer to county behavioral health plan for SUD assessment									

7. Click Sign to complete and generate the document.

Youth Medi-Cal Screening Tool		E : 2	р 🖄 😫 GoTo 💄	2, 🖬 🖶 🗅	Save X
Effective 01/18/2023 🗮 Status New Author	or Staff, Access	~	00	Sign	
14. Is a person who takes care of you often not around or unable to take care of you?	• Yes 🔵 No				•
15. Do you feel unsupported or unsafe?	🔾 Yes 💿 No				
<b>16.</b> Is anyone hurting you?	• Yes • No				
<b>17.</b> Are you having trouble with drugs or alcohol?	• Yes • No				
<b>18.</b> Is anyone in your family who lives with you having trouble with drugs or alcohol?	• Yes 🔿 No				
<b>19.</b> Do you hurt yourself on purpose?	• Yes • No				
20. In the past month, have you had thoughts about ending your life, wished you were dead, or wished you could go to sleep and never wake up?	🔵 Yes 💿 No				
21. Do you have plans to hurt others?	🗌 Yes 💽 No				- 14
<b>22.</b> Has someone outside of your family told you that you need help with anxiety, depression, or your behaviors?	🔵 Yes 💿 No				
23. Have you been seen in the hospital to get help for a mental health condition within the last six months?	Yes • No				
Assessment Score and Summary					
Total Score:	7				
Refer to Connect to MCP for a Immediately refer to a clinician for evaluation Refer to county behavioral he	pediatrician visit on homicidality and		er assessment		?

#### How do I complete a BQuIP SUD Screening Tool?

- 1. You must first have the client open, then click the Search icon.
- 2. Type BQuIP into the search bar.
- 3. Click to select BQuIP Brief Questionnaire for Initial Placement (Client).



4. The BQuIP document will open. **Complete the document**. Not all questions are visible, as only the next question will show. This allows you easier access to the Clinical Comments field for taking notes as you're working through the screening. As you answer questions, you may be alerted to stop the screening and follow crisis protocols, based on the client's answers.

BQuIP - Brief Questionnaire for Initial Placement	0 🖄 \varTheta GOTO 🚢 🖧 🏛 🖶 🗋 🖬 Save 🗙
Effective 01/14/202: 🗮 Status New Author Rowe, Charla 🗸	● ●       Sign ● < +
1.) Which of the following drugs or alcohol have you used in the last 12 months? (Read list and select all that apply)	0
Alcohol Opiates/opioids (e.g., heroin, prescription narcotics)	es) 🖸
Cannabis Benzodiazepines (e.g., marijuana, (e.g., sedatives, tranquilizers)  Other drug(s) Tetrahydrocannabinol [THC])	
<ul> <li>None</li> <li>Skip this question</li> </ul>	
Click here if you stopped the BQuIP early, but <b>NOT FOR IMMEDIATE INTERVENTION.</b> (No recommendation <b>Record clinical notes here:</b>	on will be generated)

a. Alerts will be highlighted and give you directions as you answer questions.



5. Once complete, **click Sign** to complete and generate the document.

BQuIP - Brief Ques	tionnaire foi	Initial Placement	Ę	: 🏖 🖄	\rm GoTo 💄	\$,	🖹 🖬 Save 🗙 4
Effective 01/14/202	Status New	Author	Rowe, Charla 🗸		00	Sigr	
<b>16.) Of the drugs we have</b> ● Yes ○ No	talked about, have	you injected any in the last y	year?				0
Check this box to indi	cate that emergen	cy services were engaged for	Recovery Environment.				- 1
		Interview complete- Pleas	e click "Sign" or "Save" in	the top righ	t.		
Click here if you stopp <i>Record clinical notes here</i>		but NOT FOR IMMEDIATE INT	TERVENTION. (No recomm	endation will	be generated)		
Comments and notes here							

# What do I do if the screening indicates that the client should be referred to the County's (MHP) system of care?

Since the MHP's system of care includes county owned and operated programs as well as contracted providers, you'll have to first determine if the provider you'll be referring to uses the county's instance of SmartCare or not.

#### How to refer to a county or contractor program that uses SmartCare:

- 1. To document the referral in SmartCare, you must first have the client open, then click the Search icon.
- 2. Type Client Programs into the search bar.
- 3. Click to select Client Programs (Client).



4. This takes you to the Client Programs list page. Click on the "new" icon.

≡ SmartC	CalMHSA Care	SmartcareTrain   09-21-202	<mark>2</mark> Training, Manual (1239	)) <b>+ ×</b>		<b>e</b> 🔹 🕄	Robe	rt Clinician - し
<b>. .</b>	≔	Client Program	ns (0)				94	r ★ 🕹 🗋 🗙
My Office	>							4
Lient	>	All Programs	~	All Statuses	✓ Other		~	Apply Filter
SmartLinks		Program	Status Enrolled	d Discharged	Assigned Staff	Primary	Last DOS	Next DOS
				No data	a to display			

- Select the program you're referring to.
   Change the Status to "Requested".
- 7. Enter the Requested Date.

	Program Assignment Details	🥲 i 🖓 🛅 🗋 Save
My Office >	Program Assignment	
Client >		
SmartLinks	General 5	6
SmartLinks	Program Name Primary	Current Status 🗸
	Client Training, Manual	
	Assigned Staff	Requested Date
		Enrolled Date
	Comment	Discharged Date
		Next Schedule Service
	Removed	<b>₩</b> •
	Unused	
	Unused             Removed	
	Unused	

8. Click Save.

SmartC		SASmartcaroTrain [ 09-21-2022] Characteria Contract Characteria Contracteria	nician 🗸 🖞
<b>. .</b>	≔	Program Assignment Details 🥲 🕯 🛍 🗅	Save
My Office	>	Program Assignment	
Client	>		
SmartLinks		General	
SmartLinks		Program Name Outpatient MH Adult V Primary Current Status Requested	~
		Client Training, Manual	
		Assigned Staff • Requested Date 01/05/2023	
		Enrolled Date	
		Comment Discharged Date	
		Next Schedule Service	
		Removed	
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		Removed	
		Removed V	
		Removed	
		History	
		Status Requested D Enrolled Da Discharged D Assigned St Primary Prerequisi Priority Popula Priority Modified By Modified On Comment Discharged D Assigned St Primary Prerequisi Priority Popula	ischarge Rea
		No data to display	?
		© Streamline Healthcare Solutions   SmartCare   CalMHSASmartcareTrain   09-21-2022   Health Care Organization   602022011	170   5.7602  🕻

- 9. If this program allows you to schedule intake assessments on their behalf, open the Appointment Search screen. If this program does not allow you to schedule intake assessments on their behalf, you're finished and may close.
  - a. Click the Search icon.
  - b. Type Appointment Search into the search bar.
  - c. Click to select Appointment Search.



d. Use the filters to limit the search to intake appointments for that program and any other requests the client has, such as client's availability. Then **click Search**.

Plan       Any       Service Area       Any       Programs       Outpatient MH Adult         Location       Any       Staff       Any       License       Any       License         Sex       Any       Speciality       Any       Category       Any       Any       Appointment(s)         Minutes       90       From       8:00 AM       To       8:00 PM       Any Weekday       M       T       W       T       F       S       S         Ignore Age Range Preference       Search for Client       Training, Manual       Q       Unable to Offer a Timely.       d	ppointment Search			☆★☆?
Minutes       90       From       8:00 AM       To       8:00 PM       Image: Any Weekday       Image: Any Weekday </th <th></th> <th></th> <th>V License Any V Lic</th> <th>ense Anv 🗸</th>			V License Any V Lic	ense Anv 🗸
	Minutes 90 From 8:00 AM	▲ To 8:00 PM ▲	Any Allow Overbook	y T ♥ F S S
Staff Name Date/Time Duration Type Location Name				to Offer a Timely

e. This will bring up a list of available appointments. **If the client declines the first few available appointment dates, click on the "Client Refuses Appointment" icon**. This will be used for tracking timeliness. Note: you only need to decline 1 appointment per day. In the below example, there are 3 available appointments on 1/9/23 and 3 available appointments on 1/10/23. You would only need to decline one of these appointments on each date, so you would only decline 2 total appointments, not all 6.

Plan A	nv.		~	Service	Area	Any			<ul> <li>Programs</li> </ul>	Out	tpatient MI	н Ас	hul+			~	•
												icense					
Location	Any		~	Staff	Any				<ul> <li>License</li> </ul>	Any	ý		✓ G	roup	Any	~	
Sex A	ny	~	Speciality	Any			~ 0	Category	Any		`	~	Allow Overboo	king Up to		Appointment(s)	
Minutes	90	From	8:00 AM	•	То	8:00 PM	<	2	<ul> <li>Any Week</li> </ul>	day	М 💟	~	T 🗹 W	🖌 Т	✓ F	S S	
Only	show ti	me slots n	narked as Fr	ee		Appt. Type	Inta	ke		~	Start Da	ate	01/24/2023	iii ▼ S	earch		
Trac	ro Ado F	landa Draf						Coorob fr	or Client Traini	or M	lanual		👲 🔍 Unabl	o to Offer a	Timely	Appt	
Igno	re Age P	ange Frei	erence					Searching	or client mann	ig, in	anual			e to offer a	miety	CAPPL	
		aff Na	me					Date/	Time		Δ	Du	ration	Туре		Location Nam	е
8	ĸ	<u>Stephan</u> ,	<u>, Khristy</u>					01/09/	2023 8:00 AM			12	0 mins	Intake			
8	×	<u>Clinician</u>	<u>, Robert</u>					01/09/	2023 8:00 AM			12	0 mins	Intake			
8	ĸ	<u>Clinician</u>	<u>, Robert</u>					01/09/	2023 1:00 PM			18	0 mins	Intake			
8	ĸ	<u>Stephan,</u>	<u>, Khristy</u>					01/10/	2023 8:00 AM			12	0 mins	Intake			
8	×	<u>Clinician</u>	<u>, Robert</u>					01/10/	2023 8:00 AM			15	0 mins	Intake			
8	×	<u>Clinician</u>	<u>, Robert</u>					01/10/	2023 1:00 PM			18	0 mins	Intake			
8	×	<u>Stephan,</u>	<u>, Khristy</u>					01/11/	2023 8:00 AM			12	0 mins	Intake			
8	tion Any St Any Speciality A							01/11/	2023 8:00 AM			15	0 mins	Intake			
8	×	Servin Any Servin Servin Servin Servin Speciality Any 90 From 8:00 AM We time slots marked as Free See Range Preference Stephan, Khristy Clinician, Robert Clinician, Robert Clinician, Robert Clinician, Robert Stephan, Khristy Clinician, Robert Stephan, Khristy						01/12/	2023 8:00 AM			12	0 mins	Intake			
8	ĸ	<u>Clinician</u>	<u>, Robert</u>					01/12/	2023 8:00 AM			15	0 mins	Intake			
8	×	<u>Stephan,</u>	<u>, Khristy</u>					01/13/	2023 8:00 AM			12	0 mins	Intake			
8	ĸ	<u>Clinician</u>	, Robert					01/13/	2023 8:00 AM			15	0 mins	Intake			
8	×	<u>Stephan,</u>	<u>, Khristy</u>					01/16/	2023 8:00 AM			12	0 mins	Intake			
8	×	<u>Clinician</u>	<u>, Robert</u>					01/16/	2023 8:00 AM			15	0 mins	Intake			
8	×	<u>Stephan,</u>	<u>, Khristy</u>					01/17/	2023 8:00 AM			12	0 mins	Intake			
8	-								2023 8:00 AM				0 mins	Intake			

f. Clicking on the "Client Refuses Appointment" icon will bring up a pop-up window. Enter the Refusal Reason and then click "OK".

Refusal Reason	? ×
Refusal Reason	
~	
f OK Close Specify if Other	

g. For the appointment that the client chooses, click on the "Schedule Appointment" icon.

Plan	Any		~	Service /	Area	Any	~	Programs	Outpatient	: MH Ac	lult			~	
Locat	ion A	ny	~	Staff	Any			<ul> <li>License</li> </ul>	Any			License Group	Any	~	
Sex	Any	~	Speciality	Any		~	Category	Any		~	Allow Ov	erbooking Up to		Appointment(s)	
Minu		90 From	8:00 AM	•	То	8:00 PM		Any Week	day 🔽	м	Т		✓ F	S S	
						Annt Trees	Totala		. –		01/24/2	2023 🗎 🔻 Se			
⊻ 0	nly sho	w time slots n	narked as Fre	ee		Appt. Type	Intake		✓ Star	t Date	01/24/2	2023 - 50	earch		
I	gnore A	ge Range Pref	erence				Search fo	r Client Traini	ng, Manual		<b>₫</b> Q _ [	Jnable to Offer a	<u>Timely</u>	<u>Appt.</u>	
		Staff Na	me				Date/T	ime		∆ Du	ration	Туре		Location Name	2
6	×	<u>Stephan</u> ,	<u>, Khristy</u>				01/09/2	2023 8:00 AM		12	0 mins	Intake			
6	X	<u>Clinician</u>	<u>, Robert</u>				01/09/2	2023 8:00 AM		12	0 mins	Intake			
6	×	<u>Clinician</u>	<u>, Robert</u>				01/09/2	2023 1:00 PM		18	0 mins	Intake			
0	X	<u>Stephan,</u>	<u>, Khristy</u>				01/10/2	2023 8:00 AM		12	0 mins	Intake			
0	X	Clinician	, Robert				01/10/2	2023 8:00 AM		15	0 mins	Intake			
0	X	Clinician	, Robert				01/10/2	2023 1:00 PM		18	0 mins	Intake			
6	×	<u>Stephan,</u>	<u>, Khristy</u>				01/11/2	2023 8:00 AM		12	0 mins	Intake			
	X	Clinician	<u>, Robert</u>				01/11/2	2023 8:00 AM		15	0 mins	Intake			
6	X	<u>Stephan,</u>	<u>, Khristy</u>				01/12/2	2023 8:00 AM		12	0 mins	Intake			
6	X	Clinician	<u>, Robert</u>				01/12/2	2023 8:00 AM		15	0 mins	Intake			
0	X	<u>Stephan,</u>	<u>, Khristy</u>				01/13/2	2023 8:00 AM		12	0 mins	Intake			
6	X	<u>Clinician</u>	<u>, Robert</u>				01/13/2	2023 8:00 AM		15	0 mins	Intake			
6	×	<u>Stephan,</u>	<u>, Khristy</u>				01/16/2	2023 8:00 AM		12	0 mins	Intake			
	×	Clinician						2023 8:00 AM			0 mins	Intake			

- h. This takes you to the Service Detail screen. **Confirm/enter the appointment information**. You can also denote if the person needs transportation or interpretation services.
- i. Once complete, **click Save**. The appointment is now scheduled and you are finished.
| rvice Detai        | ^{II} h      |                     | Regene      | erate Charge | C 🎝 🖞               | 10☆★           | 0 🤒 💼         | 🗋 🖬 Save     |
|--------------------|----------------------|---------------------|-------------|--------------|---------------------|----------------|---------------|--------------|
| Service Detail     | Billing Diagnosis    | Authorization(s)    | Disposition |              |                     |                |               |              |
| Service            |                      |                     |             |              |                     |                |               | 0            |
| Client             | Training, Manua      | Status              | Scheduled 🗸 | Start Date   | 01/16/2023 🛅 🔻      | Program        | Outpatient MH | Adult 🗸      |
| Procedure          | Mental Health Assess | ment by Non-Physi 🗸 | Modifier    | Start Time   | 10:30 AM            | Total Duration | 90<br>Minutes |              |
| Clinician Name     | Clinician, Robert    | ~                   |             |              |                     | End Date       | 01/16/2023    |              |
| Location           | Office               | ~                   | Attending   |              | ~                   | Referring      |               | ~            |
| Client was present | Other Person(s) Pres | sent                |             |              | Cancel Reason       |                |               | $\checkmark$ |
| Group              |                      |                     | Charge      | \$234.90     | Balance             |                | Rate ID       | 275          |
| ✓ Billable         | Do Not Complete      |                     |             |              |                     |                |               |              |
| Mode Of Delivery   | Face-to-face         | ~                   |             |              |                     |                |               |              |
| Travel Time        |                      | Minutes             |             | Note         |                     |                |               |              |
| Face to Face Time  | •                    | Minutes             |             |              |                     |                |               |              |
| Documentation Ti   | me                   | Minutes             |             |              |                     |                |               |              |
|                    |                      |                     |             | Override     | Charge Amount       | Overridd       | en By         |              |
| Evidence Based P   | ractices             | ~                   |             | Override     | Errors              | Overridd       | en By         |              |
| Transportation Se  | rvice No             |                     | ~           | □ • ·        | ter Services Needed |                |               |              |

### How to refer to an agency or program that doesn't use SmartCare:

- 1. To document the referral in SmartCare, you must first have the client open, then **click the Search icon**.
- 2. Type Client Information into the search bar.
- 3. Click to select Client Information (Client).



- 4. Navigate to the "External Referral" tab.
- 5. **Complete the information about the referral** you're providing. Put yourself as the Referring Provider.
- 6. Click "Insert".

General Aliases	Demographics	Financial	Release of Info	rmation Log	Contacts	Family	External Referral	Interfaces	
Custom Fields	Referral Follow	-Up							
Referral Informatio	-							On	en PC Providers
Referral Date			of Provider Information (add	ress, phone pi	mher fax num	►	Provider Name		~
Referring Provider 👌			mormation (add	ress, priorie ric	inder, fax hun	ibel, etc.y			
Referral Reason									
Reason for Referral 1			~		Reason for I	Referral 2			~
Reason for Referral 3			~						
Comments									
ist of Referrals							6	Insert	Clear
Referral Da	ate	Туре о	of Provider		Provider Nam	ie	Referral S	tatus	
				Vo data to disp	lav				

7. Your referral should now show in the List of Referrals section. Click Save.

General Aliases	Demographics	Financial	Release of Inforr	nation Log	Contacts	Family	External Referral	Custom Fields	
Referral Information	Referral Follow	/-Up							
eferral Informat	tion							Open PC P	roviders
leferral Date	<b></b> •	Тур	e of Provider			~	Provider Name		~
		Provide	er Information (addre	ess, phone n	iumber, fax num	nber, etc.)			
Referring Provider									
rovider 👌									
eferral Reason									
leason for Referral 1			~		Reason for F	Referral 2			~
leason for Referral 3			~						
Comments									
								Insert	Clear
ist of Referrals									
Referral	Date	Type	of Provider		Provider Nam	0	Referral	Status	
× 0 01/06/20				rovidor	Happy County		Referrat	latus	
	12.5	3005	Substance Use Services Provider			Recovery			

## How do I document follow-up done on an external referral?

- 1. To document follow-up on a referral in SmartCare, you must first have the client open, then **click the Search icon**.
- 2. **Type Client Information** into the search bar.
- 3. Click to select Client Information (Client).



- 4. Navigate to the "External Referral" tab.
- 5. Click on the Referral Follow-Up tab.
- 6. Select the referral you want to follow up on from the List of Referrals.

ent III	formatio							<b>9</b> i ^	Bave 🖥
General	Aliases	Demographics	Financial	Release of Information Log	Contacts	Family	External Referral	Interfaces	
Custom Fi	elds								
Referral I	nformation	Referral Follow	v-Up						
Appointr	ment Infor	nation	2						
Appointme	ent Date	<b></b>	•	A	ppointment Tin	ne			
Comment									
Follow U	p Informat	ion							
Did patient	t make appoin	tment OYes	No	If No Select Reas	on why				~
Received A Visit?	Ill Information	on 🗌		Additional Follow	up needed?	Yes	No		
Comments				Referral Status					~
								Modify	Clear
	eferrals								
List of Re									
List of Re									
List of Re	Referral D	ate Typ	e of Provider	Prov	rider Name		Referral Status		

- 7. If there's any information already added to this referral, it brings up the information in the top part of the screen. From here, **enter your follow up information.**
- 8. Click Modify to save your changes.
- 9. If you selected the wrong referral, click clear.
- 10. Once the client has successfully completed the referral process, enter "Complete" in the Referral Status.
- 11. Once you've finished entering any follow ups, click Save.

eneral Alias	s Demograp	hics Financial	Release of Information Log	Contacts Fami	ly External Referral	Interfaces
Custom Fields						
Referral Informat	on Referral	Follow-Up				
Appointment I	nformation					
Appointment Date		<b>₩ -</b>	Aŗ	opointment Time		
Comment						
Follow Up Info Did patient make a		Yes No	If No Select Reas	on why		~
Received All Inform Visit?			Additional Follow u		Yes ONo	
Comments			Referral Status			~
			10			
List of Referral	5				8	Modify Clear
		Type of Provider	Provi	ider Name	Referral Status	
Refe	rral Date	Type of Provider	1100			

General Aliases	Demographics	Financial I	Release of Information Log	Contacts	Family	External Referral	Interfaces
Custom Fields							
Referral Information	Referral Follow	w-Up					
Appointment Inf	ormation						
Appointment Date		•	Δ	ppointment Tim	<u>م</u>		
Comment					-		
MCP reports client ha	s not made an appo	intment or any co	ntact. Called and left the clier	nt a message on	1/20/23.		
Follow Up Inform	ation						
Did patient make app	ointment OYes	◯ No	If No Select Reas	son why			
Received All Informat Visit?	on on		Additional Follow	up needed?	⊖ Yes	No	
Comments			Referral Status				
			(10)				
							Modify Cl
						8	
list of Referrals							
List of Referrals	l Date Ty	be of Provider	Prov	vider Name		Referral Status	

# What do I do if the screening indicates that the client should be referred to the Managed Care Plan (MCP)?

If the screening indicates that you need to refer the client to the MCP, follow your county's current procedures for referring to the MCP.

- 1. To document the referral in SmartCare, you must first have the client open, then **click the Search icon**.
- 2. **Type Client Information** into the search bar.
- 3. Click to select Client Information (Client).



- 4. Navigate to the "External Referral" tab.
- 5. **Complete the information about the referral** you're providing. For a referral to the Managed Care Plan, select Managed Care Plan from the Provider Type dropdown. Put yourself as the Referring Provider.
- 6. Click "Insert".

General Aliases	Demographics	Financial	Release of Info	rmation Log	Contacts	Family	External Referral	Interfaces	
Custom Fields	Referral Follow	-Up							
Referral Informatio	-							On	en PC Providers
Referral Date			of Provider Information (add	ress, phone pi	mher fax num	►	Provider Name		~
Referring Provider 👌			mormation (add	ress, priorie ric	inder, fax hun	ibel, etc.y			
Referral Reason									
Reason for Referral 1			~		Reason for I	Referral 2			~
Reason for Referral 3			~						
Comments									
ist of Referrals							6	Insert	Clear
Referral Da	ate	Туре о	of Provider		Provider Nam	ie	Referral S	tatus	
				Vo data to disp	lav				

7. Your referral should now show in the List of Referrals section. Click Save.

General Aliases	Demographics	Financial	Release of Inform	nation Log	Contacts	Family	External Referral	Custom Fields
Referral Informatio	n Referral Follow	/-Up						
Referral Informa	ation							Open PC Provide
Referral Date	<b></b>	Тур	e of Provider			~	Provider Name	<b>`</b>
		Provide	r Information (addre	ess, phone n	umber, fax nur	nber, etc.)		
Referring Provider								
Provider 👌								
Referral Reason								
Reason for Referral :	L		~		Reason for I	Referral 2		~
Reason for Referral 3	}		~					
0								
Comments								
								Insert Clear
List of Referrals								
Referra	I Date	Туре	of Provider		Provider Nam	ne	Referral S	Status
× O 01/06/2	2023	Mana	ged Care Plan		Covered Califo	rnia		

# What do I do if the screening indicates that the client should be referred to additional services, such a Primary Care Physician?

If the screening indicates you need to refer to additional services with providers that do not use your county's instance of SmartCare, follow your county's procedures for sending these referrals.

- 8. To document the referral in SmartCare, you must first have the client open, then **click the Search icon**.
- 9. **Type Client Information** into the search bar.
- 10. Click to select Client Information (Client).

	Training, Manual (1239) + ×
Q client information	
S Client Informatio	on (Client)
	3

- 11. Navigate to the "External Referral" tab.
- 12. Complete the information about the referral you're providing. Put yourself as the Referring Provider.
- 13. Click "Insert".

General Aliases	Demographics	Financial F	lelease of Info	rmation Log	Contacts	Family	External Referral	Interface	S
Custom Fields Referral Information	Referral Follow	-Up							
Referral Informatio	on							Ор	en PC Providers
Referral Date	<b>∷</b> ▼	Туре о	f Provider			~	Provider Name		~
Referring Provider 👌		Provider In	formation (add	ress, phone nu	ımber, fax num	iber, etc.)			
Referral Reason									
Reason for Referral 1		~			Reason for F	Referral 2			~
Reason for Referral 3 Comments			~						
ist of Referrals							6	Insert	Clear
Referral D	ate	Type of	Provider		Provider Nam	e	Referral S	tatus	
			Ν	lo data to disp	lay				

14. Your referral should now show in the List of Referrals section. Click Save.

eneral Aliases	Demographics	Financial	Release of Inforr	nation Log	Contacts	Family	External Referral	Custom Fields	
eferral Information	Referral Follow	/-Up							
Referral Informat	ion							Open PC Pr	oviders
Referral Date	<b></b> •	Тур	e of Provider			~	Provider Name		~
		Provide	r Information (addre	ess, phone n	umber, fax nun	nber, etc.)			
Referring Provider 🔥									
Provider 👌									
Referral Reason									
Reason for Referral 1			~		Reason for I	Referral 2			~
Reason for Referral 3			~						
Comments									
								Insert C	lear
ist of Referrals									
Referral	Date	Тура	of Provider		Provider Nam	10	Referral S	tatus	
X 0 01/06/20			ry Care Physician		Who, Docter		Neiellato	au su	
► ○ 01/06/20	23	FIIMe	ny care ritysiciali		who, Docter				

# Supervisor/Front Desk: What do I do when there's a program enrollment request for a program that manages its own scheduling?

Some programs in your county may not allow other staff to schedule intake appointments, instead keeping this task solely within this program. When someone requests enrollment in this type of program, you will be expected to schedule the initial intake appointment.

- 1. You must first have the client open, then **click the Search icon**.
- 2. **Type Appointment Search** into the search bar.
- 3. Click to select Appointment Search.



4. Use the filters to limit the search to intake appointments for that program and any other requests the client has, such as client's availability. Then **click Search**.

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Locatio	on	Any			~	Staff	An	у				~	License	Any			~	License Group		Any		``	•	
Sex	Any		~	Specia	lity	Any			~	<ul> <li>Ca</li> </ul>	ategory	A	lny		•	~	Allow Overt	booking Uj	p to		Appoin	tment(s)		
Minute	s	90	From	8:00	AM	1	1	To 8:	00 PM	٩	<u>&gt;</u>	~	Any Week	day	М 🗹	~	Т	W 🔽 1		F	S	S		
✔ Onl				marked a ference	s Fre	e		App	ot. Type	Intak		for C	Client Trainir	✔ ng, Ma			01/09/202		Sea er a T		4			
		Staff	Name					Dat	e/Time				Durati	on			Туре		L	ocation	n Name			
										No A	ppointm	nent	(s) Available											

5. This will bring up a list of available appointments. If the client declines the first few available appointment dates, click on the "Client Refuses Appointment" icon. This will be used for tracking timeliness. Note: you only need to decline 1 appointment per day. In the below example, there are 3 available appointments on 1/9/23 and 3 available appointments on 1/10/23. You would only need to decline one of these appointments on each date, so you would only decline 2 total appointments, not all 6.

poir	ntm	ent Sear	ch (26)													☆★초	?
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Sex	Any	~	<ul> <li>Speciality</li> </ul>	y Any			~	Category	Any		~	Allow O	Overbool	' king Up to		Appointment(s)	
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	alv eb	ow time slots	marked as F	roo		Appt.	Type T	ntake		~	Start Da	te 01/24	1/2023	<b>⊟ - -</b>	earch		
🔽 Ig	nore /	Age Range Pre	eference					Search fo	r Client Trainin	ıg, Mar	iual	<u></u> <b>∂ Q</b>	<u>Unable</u>	to Offer a	Timely	<u>Appt.</u>	
		5 Aff Na	lame					Date/1	ïme		Δ	Duration		Туре		Location Name	a
8	X	Stephar	n <u>, Khristy</u>					01/09/	2023 8:00 AM			120 mins		Intake			
3	X	Cliniciar	n, Robert					01/09/	2023 8:00 AM			120 mins		Intake			
6	×	<u>Cliniciar</u>	n, Robert					01/09/	2023 1:00 PM			180 mins		Intake			
6	×	<u>Stephar</u>	<u>n, Khristy</u>					01/10/	2023 8:00 AM			120 mins		Intake			
6	×	<u>Cliniciar</u>	n, Robert					01/10/	2023 8:00 AM			150 mins		Intake			
6	×	<u>Cliniciar</u>	n, Robert					01/10/	2023 1:00 PM			180 mins		Intake			
6	×	<u>Stephar</u>	<u>n, Khristy</u>					01/11/	2023 8:00 AM			120 mins		Intake			
0	×	<u>Cliniciar</u>	n, Robert					01/11/	2023 8:00 AM			150 mins		Intake			
0	×	<u>Stephar</u>	<u>n, Khristy</u>					01/12/	2023 8:00 AM			120 mins		Intake			
6	×	<u>Cliniciar</u>	n, Robert					01/12/	2023 8:00 AM			150 mins		Intake			
8	×	Stephar	<u>n, Khristy</u>					01/13/	2023 8:00 AM			120 mins		Intake			
0	×	Cliniciar	n, Robert					01/13/	2023 8:00 AM			150 mins		Intake			
ö	×	<u>Stephar</u>	<u>n, Khristy</u>					01/16/	2023 8:00 AM			120 mins		Intake			
0	×	<u>Cliniciar</u>	n, Robert					01/16/	2023 8:00 AM			150 mins		Intake			
ö	×	<u>Stephar</u>	<u>n, Khristy</u>					01/17/	2023 8:00 AM			120 mins		Intake			
0	X	Cliniciar	n, Robert					01/17/	2023 8:00 AM			150 mins		Intake		~ ~ ?	

6. Clicking on the "Client Refuses Appointment" icon will bring up a pop-up window. Enter the Refusal Reason and then click "OK".

Refusal Re	eason	? 🛛
	Refusal Reason	
	~	
	<mark>бок Close</mark> Specify if Other	

7. For the appointment that the client chooses, click on the "Schedule Appointment" icon.

Plan	Any		~	Service	Area	Any		✓ Programs	Outpat	tient MH	Adult		~	
Loca	tion An	y	~	Staff	Any			✓ License	Any			<ul> <li>License</li> <li>Group</li> </ul>	Any	~
Sex	Any	~	Speciality	Any			<ul> <li>Category</li> </ul>	Any		~	Allow C	verbooking Up to	A	ppointment(s)
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	Doly show	v time slots m	arked as Fr	20		Appt. Type	Intake		✓ s	Start Da	te 01/24	/2023 🗎 🔻 Se	earch	
_				56		App: Type								
✓ I	gnore Ag	je Range Prefe	erence				Search	for Client Traini	ng, Manı	ual	<u></u> <b>∂ Q</b>	Unable to Offer a	<u>Timely Ap</u>	<u>pt.</u>
		Staff Nar	ne				Date	/Time		Δ	Duration	Туре		Location Name
8	×	<u>Stephan,</u>	<u>Khristy</u>				01/09	9/2023 8:00 AM			120 mins	Intake		
6	×	<u>Clinician,</u>	Robert				01/09	9/2023 8:00 AM			120 mins	Intake		
6	×	<u>Clinician,</u>	Robert				01/09	9/2023 1:00 PM			180 mins	Intake		
Ö	×	<u>Stephan,</u>	<u>Khristy</u>				01/10	0/2023 8:00 AM			120 mins	Intake		
6	×	<u>Clinician,</u>	Robert				01/10	0/2023 8:00 AM			150 mins	Intake		
6	×	<u>Clinician,</u>	Robert				01/10	D/2023 1:00 PM			180 mins	Intake		
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6	×	<u>Clinician,</u>	Robert				01/1:	1/2023 8:00 AM			150 mins	Intake		
8	×	<u>Stephan,</u>	<u>Khristy</u>				01/12	2/2023 8:00 AM			120 mins	Intake		
0	×	<u>Clinician,</u>	Robert				01/12	2/2023 8:00 AM			150 mins	Intake		
0	×	<u>Stephan,</u>	<u>Khristy</u>				01/13	3/2023 8:00 AM			120 mins	Intake		
0	×	<u>Clinician,</u>	Robert				01/13	3/2023 8:00 AM			150 mins	Intake		
6	×	<u>Stephan,</u>	<u>Khristy</u>				01/10	5/2023 8:00 AM			120 mins	Intake		

- 8. This takes you to the Service Detail screen. **Confirm/enter the appointment information**. You can also denote if the person needs transportation or interpretation services.
- 9. Once complete, click Save. The appointment is now scheduled and you are finished.

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Service											(
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Location	Office		~	Attending			~	Referring			$\mathbf{v}$
Client was present	Other Perso	n(s) Prese	nt			Cancel Reason	n				$\sim$
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## Life Cycle of the Client: Intake and Assessment

Once a person has been screened and is referred to a county, the next step is a full clinical assessment. However, there is also an intake process in order to enroll the client in the appropriate program and complete necessary program and legal documentation. In this section, we'll start with the basic intake process, then cover how to complete the intake paperwork packet, and then cover the clinical assessment and diagnosis.

Intake and Assessment Process Steps:

- 1. Find or create the client in SmartCare.
- 2. Enroll the client in the assessment program.
- 3. Confirm/enter the client's information, such as contact information, insurance, and basic demographics.
- 4. Complete the necessary intake documentation for your program.
- 5. Complete the clinical assessment.

## Front Desk: A client has arrived for their intake/assessment appointment. What do I do?

- 1. **Open the Reception view**, if not already done so.
  - a. Click the Search icon.
  - b. **Type "Reception"** in the search bar.
  - c. Select "Reception/Front Desk (My Office)" from the search results.



- d. This will bring up the Reception/Front Desk view. **Select your program from the Views dropdown menu**. Your system administrator can set up the appropriate list for your location. If you've used this screen before, it should populate from the most recent view you used.
- e. Click Apply Filter to apply the view filter.
- 2. To check in a client, click the link in the Status column.

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a. This will bring up a pop-up window which auto-populates to "Show." Click Change to check the client in.

Change Status			? ⊠
	Show	~	
	a Change Close		

b. You can also use this to cancel the appointment or mark the client as a no-show. If you mark this as "Cancel," you'll need to enter the reason for cancellation. If you mark this as "cancel" or "no show," you can NOT undo this.

	? ×
Cancel	~
Select Cancel Reason	Y
	b
Change Close	-

3. To open the client's chart, click on the link in the Client column.

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01/	23/202	3 🛗 🕶	All Views		~	All Statu	ses	✓ A	ll Clinicians		✓ App	ly Filter				
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- 4. Open the Client Programs list page.
  - a. Click the Search icon.
  - b. Type "Client Program" in the search bar.
  - c. Select "Client Programs (Client)" from the search results.



5. Find your program on the list and click on the link in the Status column, which should be listed as "Requested."

lient Programs (2)							01	* * * 0 *
All Programs		✓ All Statuse	s	~	Other		~	Apply Filter
Program Name	Status	Enrolled		Assigned Staff	Primary	Last DOS	Next DC	S
Outpatient MH Adult	Enrolled	01/13/2023			Yes		01/19/2	023 08:00 AM
Outpatient MH Adolesc	Requested				No			
	_	6						

- 6. This takes you to the Client Program Details screen. Change the Status to "Enrolled".
- 7. This unlocks the Enrollment Date field. Enter today's date in the Enrollment Date field.
- 8. Click Save.

agram Assignment neral gram Name Outpatient MH Adult Interim I	nt Status	Enrolled	8	
gram Name Outpatient MH Adult	nt Status	Enrolled		
	nt Status	Enrolled		
ent Training, Manual				~
				_
igned Staff	ested Date	01/05/202	23 🗰 🔻	
Enroll	led Date		<b></b>	
nment Discha	arged Date		<b>iii *</b>	
Next S Service	Schedule			

9. The next steps in the process are to complete the intake documentation packet, confirm the client's information, and for the clinician to complete the clinical assessment. Complete the documents you are responsible for. Follow the steps in How do I complete Intake Documents?. If you have documents that were completed on paper that need to be scanned in to SmartCare, see How do I scan a document into the client's record? If you need additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).

# Front Desk: A person has walked in for an assessment at a walk-in clinic. What do I do?

1. Use the Client Search screen to determine if the person is a client already in the system.



a. If they are already a client in the system, select them to open their record.

Client S	Search								8	×
	lear			_						
Nam	e Searc	h 🗌 Incl	ude Client Contacts	Only Include	Active Clients (C	hecking will	not allow o	ption to creat	e new Client)	_
	Broad S	Search	Narrow Search	Type of Client	Individual 🔿 C	rganization	All Clier	nt Search		
	Last Nam	e Tr	aining	First Name	Manual		Program		~	
Othe	er Searcl	h Strateg	ies							
	SSN S	earch	555 66	8453	Phone	# Search				
	DOB S	earch	06/16/2000	<b>⊞ ▼</b>	Master (	lient ID Sea	rch			
	Primary (	Clinician Se	arch	~	Client I	D Search				
	Authori	zation ID /	#		Insured	ID Search				
Reco	ords Fou	nd								
	ID	Master ID	Client Name	∆ <u>Chosen Name</u>	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Primary Clinician	
0	1244	1244	Test, Problemlist		9684	06/19/20	Active			h
-										
								a		
								<b>\</b>		
•									•	
					Cre	ate New Pot	ential Clier	nt Sele	ect Cancel	
					R	egistration	Inquiry (S	elected Client	i) Inquiry (New Clien	t)

b. If they are not a client in the system, click "Create New Potential Client". You'll have to search individually by name, date of birth (DOB), and social security number (SSN) in order to create a new client.

Client Search		<b>9</b> E
Clear Name Search Include Client Contacts Only Include Active Clients (	Checking will not allow option to cr	este new Client)
Name Search Include Gient Contacts Only Include Active Gients (	snecking will not allow option to ci	eate new Glient)
Broad Search Narrow Search Type of Client O Individual 🔾	Organization	
Last Name First Name	Program	~
Other Search Strategies		
SSN Search Phone	# Search	
	Client ID Search	
	ID Search	
Authorization ID / # Insure	d ID Search	
Records Found		
ID Master ID Client Name 🛆 Chosen Name SSN/EIN	DOB Status City	Primary Clinician
	<u>Sola</u> <u>Status</u> <u>City</u>	<u>I minury cumetan</u>
No data to display		
· b		• •
Cr	eate New Potential Client	Select Cancel
	Registration Inquiry (Selected Cl	lient) Inquiry (New Client)

### 2. Open the Client Programs list page.

- a. Click the search icon.
- b. Type in "Client Programs"
- c. Select "Client Programs (Client)" from the search results.



3. Confirm the client needs an assessment. If you just created a new client, obviously they'll need an assessment. However, if the person was already a client in the system, you'll want to check to see if they already are connected to services. Look at the Client Programs to see if the client is already open to a program that can share an assessment with your program. If the client does need an assessment, enroll them in your program by **clicking the New icon**.

Sma	rtcareTrain   09-21-2022 Trainin	ng, Manual (1	239) 💵 📋	<b>0 +</b> ×			£	🗳 🔊	?	Access Staff ・ <b>し</b>
С	lient Programs (2)								91	* * * 🗅 🜣 🗄
	All Programs	``	All Statuses		~	Other			~	Apply Filter
	Program Name	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS		Nex	t DOS
	Outpatient MH Adult	Enrolled	01/13/2023			Yes			01/1	9/2023 08:00 AM
	Outpatient MH Adolesc	Requested				No				

- 4. Complete the Client Program Details screen.
  - a. Select your program from the dropdown menu.
  - b. Enter the status of the program as "enrolled".
  - c. Enter the enrollment date. This will be today's date. You may leave the requested date blank.
  - d. If known, enter the assigned staff. You can also enter any comments related to this program enrollment.
  - e. Click Save.

Program As Program Assig	signment Details	4			<b>℃</b> i № m	e Save
General		а		b		<b>^</b>
Program Name	Outpatient MH Adolescent	~	Primary	Current Status	s Enrolled	~
Client	Training, Manual					
Assigned Staff	Clinician, Robert	~	d	Requested Da	te 01/19/2023	iii -
	Adding additional services			C Enrolled Date	01/21/2023	<b>≕</b> -
Comment				Discharged Da	ate	iii ▼
				Next Schedule Service	e	

5. The next steps in the process are to complete the intake documentation packet, confirm the client's information, and for the clinician to complete the clinical assessment. Complete the documents you are responsible for. Follow the steps in How do I complete Intake Documents?. If you have documents that were completed on paper that need to be scanned in to SmartCare, see How do I scan a document into the client's record? If you need

additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).

## Clinical: A client has arrived for their intake/assessment appointment at a program where we don't have a receptionist checking clients in. What do I do?

- 1. **Open the client's record**, if not already done so.
  - a. You can do this from your Staff Calendar by selecting their appointment on your calendar.

Staff Cale	endar	<b>i</b> e s	⊈ × 0
		<	
Single-	Staff View V Clinician, Robert LCSW Licensed Cliniv 30 Minutes Intervals V Single Staff	Showing 1-1/1	Apply Filter
		>	
苗 Today	💼 Day 🛱 Week 🗰 Month 🕻 C Refresh < > Jan 19 2023		
	Clinician, Robert		
	THU		
	1/19		
	a		*
8:00 AM	C 8:00 AM - 10:30 AM Intake Hours ClientTraining, Manual(#1239) - Mental Health (Service)	Assessment by Nor	-Physician
9:00 AM			
10:00 AM			
	Clor30 AM - 12:00 PM Client Assessment Time		
11:00 AM			
12:00 PM	C 12:00 PM - 1:00 PM		
	Lunch		
1:00 PM	C 1:00 PM - 4:00 PM Client Appointments		

b. You can also do this using the Client Search screen.



- 2. Open the Client Programs list page.
  - a. Click the Search icon.
  - b. Type "Client Program" in the search bar.
  - c. Select "Client Programs (Client)" from the search results.



3. Find your program on the list and click on the link in the Status column, which should be listed as "Requested."

lient Programs (2)	0 ☆ ★ 2 □ ≎						
All Programs		✔ All Statuses	~	✓ Other			Apply Filter
Program Name	Status	Enrolled ⊽ [	Discharged Assigned Staff	Primary	Last DOS	Next DOS	5
Outpatient MH Adult	Enrolled	01/13/2023		Yes		01/19/20	23 08:00 AM
Outpatient MH Adolesc	<u>Requested</u>	3		No			

- 4. This takes you to the Client Program Details screen. Change the Status to "Enrolled".
- 5. This unlocks the Enrollment Date field. Enter today's date in the Enrollment Date field.
- 6. Click Save.

Program As	signment Details				<b>ن</b> ک	🌣 i 🐣 🛅 🗋 🖬 Save
Program Assig	nment					6
General				4		
Program Name	Outpatient MH Adolescent	$\sim$	Primary	_	Current Status	Requested 🗸
Client	Training, Manual					
Assigned Staff		~		5	Requested Date	01/05/2023 🗰 🕶
					Enrolled Date	
Comment					Discharged Date	
					Next Schedule Service	

7. **Complete your required documents**. Depending on your program, this may include intake forms in addition to clinical assessment documents. Follow the steps in How do I complete Intake Documents?. If you have documents that were completed on paper that need to be scanned in to SmartCare, see How do I scan a document into the client's record? If you need additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).

## Clinical: A client has arrived for their intake/assessment appointment at a program where we have a receptionist checking clients in. What do I do?

1. The receptionist will have already checked in the client, which includes enrolling them in your program. You should be able to see this on your Appointments for Today widget. Make sure to click the refresh icon throughout the day for updates.

1		2
Time	Status	_
<u>08:00 AM</u>	Show	ATP 🗎 🕻
<u>09:30 AM</u>	Show	ATP 📋 🕻
<u>12:00 PM</u>	_	
04:00 PM		
	Time           08:00 AM           09:30 AM           12:00 PM	Time         Status           08:00 AM         Show           09:30 AM         Show           12:00 PM

- 2. **Open the client's record**, if not already done so.
  - a. You can do this from your Appointments for Today widget by clicking on the client's name.

opointments For Today				C
Client Name/Description	Time	Status		
Training, Manual(M	<u>08:00 AM</u>	Show	ATP	<b>1</b> 0
Training, Manual(P	<u>09:30 AM</u>	Show	ATP	<b>1</b> 0
Lunch	<u>12:00 PM</u>			
Paper Work	04:00 PM			

b. You can do this from your Staff Calendar by selecting their appointment on your calendar.



c. You can also do this using the Client Search screen. This would be recommend for clients who have walked-in for an assessment.



3. **Complete your required documents**. Depending on your program, this may include intake forms in addition to clinical assessment documents. Follow the steps in How do I complete Intake Documents?. If you have documents that were completed on paper that need to be scanned in to SmartCare, see How do I scan a document into the client's record? If you need additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).

## Clinical: A person has walked in for an assessment at a walk-in clinic, and we don't have a receptionist to check clients in. What do I do?

1. Use the Client Search screen to determine if the person is a client already in the system.



c. If they are already a client in the system, select them to open their record.

Client Search						<b>?</b>
Clear						
Name Search Include Client Conta	cts 🗌 Only Include Acti	ve Clients (Ch	hecking will n	iot allow o	ption to create	e new Client)
Broad Search Narrow Search	Type of Client OInd	lividual 🔾 Or	ganization	All Clier	t Search	
Last Name Training	First Name Ma	anual	F	rogram		~
Other Search Strategies						
SSN Search 555 6	6 8453	Phone #	Search			
DOB Search 06/16/20			lient ID Sear	ch		
Primary Clinician Search	×	Client ID				
Authorization ID / #			ID Search			
Records Found						
Records Found						
ID Master ID Client Name	∆ <u>Chosen Name</u>	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Primary Clinician
1244 1244 Test, Problemi	ist	9684	06/19/20	Active		<b>^</b>
					a	
4						▼
		Crea	ate New Pote	ential Clier	nt Sele	ct Cancel
		Re	gistration ]	(nquiry (Se	elected Client	) Inquiry (New Client)

d. If they are not a client in the system, click "Create New Potential Client". You'll have to search by name, date of birth (DOB), and social security number (SSN) in order to create a new client.

ient Search						?
Clear	🕱 No Search Records F	ound				
Name Search	Include Client Contacts		Active Clients (Cheo	king will not allow	option to c	reate new Client)
Broad Searc	h Narrow Search		Individual Orga		ent Search	•
Last Name	Training		Manual		ent Search	×
	5	First Name	Manual	Program		•
Other Search St	rategies					
SSN Searc	h 555 66	8453	Phone # Se	earch		
DOB Searc	h 06/16/2000		Master Clier	nt ID Search		
Primary Clinic	ian Search	~	Client ID S	earch		
Authorizatio	n ID / #		Insured ID	Search		
Records Found						
(ecolus l'ound						
ID Mas	ter ID <u>Client Name</u> $\Delta$	Chosen Name	SSN/EIN DO	<u>B</u> <u>Status</u>	<u>City</u>	Primary Clinician
		No d	ata to display			
4			b			÷.
			Create	New Potential Cli	ent	Select Cancel
			Regis	stration Inquiry (	Selected C	lient) Inquiry (New Clien

#### 2. Open the Client Programs list page.

- a. Click the search icon.
- b. Type in "Client Programs"
- c. Select "Client Programs (Client)" from the search results.



3. Confirm the client needs an assessment. If you just created a new client, obviously they'll need an assessment. However, if the person was already a client in the system, you'll want to check to see if they already are connected to services. Look at the Client Programs to see if the client is already open to a program that can share an assessment with your program. If the client does need an assessment, enroll them in your program by **clicking the New icon**.

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Client Prog	rams (2)							e	9 ☆ ★ ↓ □ ¢ ÷
All Programs		,	✓ All Statuses		~	Other			<ul> <li>Apply Filter</li> </ul>
Program Name	•	Status	Enrolled $\nabla$	Discharged	Assigned Staff	Primary	Last DOS	I	Next DOS
Outpatient MI	H Adult	Enrolled	01/13/2023			Yes		0	1/19/2023 08:00 AM
Outpatient M	H Adolesc	Requested				No			

- 4. Complete the Client Program Details screen.
  - a. Select your program from the dropdown menu.
  - b. Enter the status of the program as "enrolled".
  - c. Enter the enrollment date. This will be today's date. You may leave the requested date blank.
  - d. If known, enter the assigned staff. You can also enter any comments related to this program enrollment.
  - e. Click Save.

Program As Program Assig		4			<b>└ i</b> ♣ 🖻 🗅	Save ×
General		a		b		
Program Name	Outpatient MH Adolescent	~	Primary	Current Status	s Enrolled	~
Client	Training, Manual					
Assigned Staff	Clinician, Robert	~	d	Requested Da	te 01/19/2023 🛅 🕇	
	Adding additional services			Enrolled Date	01/21/2023 🚞 🕇	
Comment				Discharged Da	ite 🗎 🗎 🕇	
				Next Schedule Service	9	

5. The next steps in the process are to complete the intake documentation packet, confirm the client's information, and for the clinician to complete the clinical assessment. Complete the documents you are responsible for. Follow the steps in How do I complete Intake Documents?. If you have documents that were completed on paper that need to be scanned in to SmartCare, see How do I scan a document into the client's record? If you need

additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).

## How do I complete Intake Documents?

- 1. You must first have the client open, then **click the Search icon**.
- 2. Type the document's name into the search bar.
- 3. Click to select the document from the search results.



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG	Program Enrollment	<b>⊛</b> ⊠
	Select Program Enrollment	4
	MH Screening-10/03/2022	~
	OK Cancel	

6. The document will open. **Complete the document** based on the client's responses. Once completed, **click Sign**.

<b>e</b> :	🏖 🖻 🛛 GoTo 🛔	\$,	Save X
~	00	Sign	0<+
			()

7. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.



- 8. This opens the signature details. Select the client and/or guardian from the Signer field. You will need to select each cosigner one at a time, so repeat these steps as needed.
- 9. Click Co-Sign.



- 10. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan a document into the client's record?
  - a. Select the method of capturing the signature.
  - b. Once the co-signer is happy with their signature, **click the Sign button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
  - c. If the cosigner needs to start over, click the Clear button to erase the current signature.

SignaturePage	? ×
Training, Manual is signing the Coordinated Care Consent	
Training, Manual 01/16/2023 1:16 PM a	
🔍 Password 💽 Signature Pad 🔿 Mouse/Touchpad 🔷 Client Signed Paper Document 🔷 Verbally Agreed Over Phone	·
b	
Sign Clear Cancel	

Once signed by all required people, you are finished with this document and may move on to the next.

## Life Cycle of the Client: Services

Now that the Intake process is complete, you can begin providing services. This is the bulk of the life cycle of the client. This section includes documenting the services you provide to the client, making ongoing clinical decisions about what services the client needs, and transitioning the client through programs as they take steps toward recovery.

## How do I write a progress note for a scheduled service?

Note: to document a progress note for a group, see How do I write a group progress note?

1. On your Appointments for Today widget, click on the time link for the service you're documenting.



- 2. This opens the service note. Complete the service details.
  - a. Confirm/Enter Mode of Delivery.
  - b. Enter Face to Face Time. Under CalAIM Payment Reform, this is what is used for billing. Enter Travel Time and Documentation Time if applicable.
  - c. Enter Evidenced-Based Practices if applicable.

Status	Scheduled	$\sim$		Start Date	01/22/2023	3 🛗 🕶	
Program	SUD Screening	~		Start Time	1:00 PM		
Procedure	Alcohol and/or drug screening	~	Modifier	Travel Time		Minutes	
Location	Community Mental Health Center	$\sim$		Face to Face Time		Minutes	
Clinician	Bastida, Armando			Documentation Time		Minutes	
Mode Of Delivery Face	-to-face 🗸			Total Duration	15	Minutes	
Cancel Reason		$\sim$	T	Attending			$\sim$
				Referring			$\checkmark$
Evidence Based Practices		$\sim$					
Custom Fields							
Interpreter Service							
Interpreter has been sche	duled 🔾 Yes 🔵 No						
Interpreter Agency Sched	iled						

d. If this is a note for a crisis service, an Emergency Indicator field will appear. Enter whether this was an emergency or not.

#### Screenshot with crisis intervention selected

- 3. If the status is show, you may now click on the Note tab. Complete the progress note tab. This note type may look different depending on the procedure code you have chosen. Most will include 3 fields: the Problem List section, the Note section, and the Care Plan section.
  - a. If you want to add problems to the problem list, you can do so here. Follow the instructions in How do I add a problem to the Problem List?.

de N44.00 art Date: 01/2		eversible ischaemia of testis	-			~	Q 🕁
roblem Lis		10 Date: 01/26/2023	Fiografi		I	Insert	Clear
	SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program	
		No di	ata to display				
blems add	Iressed during this sessi	on					Refr
te							
scribe current :	service(s), how the service addre	ssed the beneficiary's beha	wioral health need (e	g., symptom, con	dition, diagnosis	s, and/or risk fact	ors).

b. Select with problems you addressed in today's session.

#### <mark>screenshot</mark>

c. **Enter your note** in the Note section. This should include all your usual clinical information, such as your interventions and the client's response to the interventions.

#### <mark>screenshot</mark>

d. **Enter your plan of care** in the Care Plan section. For services that require a treatment plan, this is where the treatment plan is entered. This information will pull forward from the most recent service note in the same program. There may be text templates available for specific treatment plan requirements.

#### <mark>screenshot</mark>

4. The Billing Diagnosis tab will show you which diagnoses will be pulled onto the billing. You should generally ignore this tab for ongoing services. However, if you need to change the billing order, for example you want this note to focus on the secondary diagnosis, you can re-order the diagnoses to match your service without changing the overarching diagnosis form.

[screenshot]

5. When you are complete, click Sign.

[screenshot]

## How do I write a progress note for an unscheduled service?

- 1. Click the search icon.
- 2. Type in "New Service Note" in the search bar.
- 3. Click on "New Service Note" in the search results.

#### [screenshot]

- 4. This opens the service note. Complete the service details.
  - a. Select your program from the dropdown menu. This will determine which procedure codes you can select.
  - b. Select the procedure code from the dropdown menu.

- c. Select the location and mode of service.
- d. Enter the date of the service.
- e. Enter the time(s) of the service. Face to face time is required, as this is used for billing. We recommend completing the travel and documentation as well, though these are not required for billing.

## [screenshot]

- 5. Click on the Note tab. Complete the progress note section. This note type may look different depending on the procedure code you have chosen. Most will include 3 fields: the Note field, where you will enter the main part of your note, the Care Plan field, which will pull from the most recent note in you program and where you will make updates to any plan of care, and the Problem List section, where you can add problems directly from the note.
- 6. The Billing Diagnosis tab will show you which diagnoses will be pulled onto the billing. You should generally ignore this tab for ongoing services. However, if you need to change the billing order, for example you want this note to focus on the secondary diagnosis, you can re-order the diagnoses to match your service without changing the overarching diagnosis form.
- 7. When you are complete, click Sign.

## I need to amend a note. What do I do?

- 1. Find and open the note you need to amend.
  - a. Make sure you have the client open. Click on the search icon and type "documents" in the search bar. Click on "Documents (Client)" from the search results to open a list of documents that have been completed for the client.

## [screenshot]

- b. Use the list page filters to find the note you're looking for.
- c. Click on the note you want to amend. This should open the pdf.

## [screenshot]

2. Click the Edit icon in the upper right corner of the PDF viewer.

## [screenshot]

3. A pop-up will appear, letting you know that this will create a new version of this document. Click OK.

## [screenshot]

- 4. The service note screen will now appear. Some pieces you may not be able to edit due to billing having already been completed for this service. However, you should be able to **navigate to the Note tab**. From here, feel free to **edit the note as necessary**. The older version will still remain in the system for audit purposes, meaning anything you write or delete here will not affect the original version.
- 5. Once you're finished, click Sign.

## [screenshot]

6. The new, corrected version will show in the PDF viewer. If needed, you can look at the previous version of this document by clicking on the version link in the upper left corner of the PDF viewer. When people open this document, the most recent (corrected) version will be what they are shown.

## [screenshot]

 $\stackrel{\scriptstyle }{\searrow}$  Under Construction  $\stackrel{\scriptstyle }{\swarrow}$ 

## How do I add the client to my program?

1. Open the client's record, if not already done so. You can do this using the Client Search screen.

21		
Q Client S		
< Client Se	arch >	
/i	04/05/2000	
Accession, Na	9) <b>10/10/1990</b>	t
	(1247) <b>05/11/1943</b>	
-	08/05/1960	le

- 2. Open the Client Programs list page.
  - a. Click the Search icon.
  - b. Type "Client Program" in the search bar.
  - c. Select "Client Programs (Client)" from the search results.



- 3. This opens the Client Programs list page.
  - a. If your program is on the list, **click on the link in the Status column**. The status is likely Requested, if the referral process has been started. If the status is Discharged, do not edit this enrollment and instead add your program as if it's a new program by clicking on the New icon.
  - b. If your program is not on the list, click on the New icon.

Client Programs (2)	3							9	☆ ★ 🕹 🗋 b
All Programs		✓ All Status	es		~	Other		~	Apply Filter
Program Name	Status	Enrolled	$\nabla$	Discharged	Assigned Staff	Primary	Last DOS	Next DO	s
Outpatient MH Adult	Enrolled	01/13/202	3			Yes	01/19/2023 09:30 AM		
Outpatient MH Adolesc	<u>Requested</u>	a				No			

- 4. Complete the Client Program Details screen.
  - a. If not already done so, **select your program** from the dropdown menu.
  - b. Enter the status of the program as "enrolled".
  - c. Enter the enrollment date. This will be today's date. You may leave the requested date blank, if it is not already entered.
  - d. If known, enter the assigned staff. You can also enter any comments related to this program enrollment. Specialty Mental Health Services Clinical Documentation User Guide Page 101

#### e. Click Save.

Program As	signment Details	4			,	<b>i</b> AB ī	i 🗋 🖬 Save 🗙
Program Assig	nment						
General			a	b			
Program Name	Outpatient MH Adolescent	~	Primary		Current Status	Enrolled	~
Client	Training, Manual						
Assigned Staff	Clinician, Robert	~	C		Requested Date	01/19/2023	<b>≡</b> -
	Adding additional services			С	Enrolled Date	01/21/2023	<b>₩ -</b>
Comment					Discharged Date		iii -
					Next Schedule Service		
-					Service		

5. The next steps in the process are to **complete any documents needed** to enroll in your program. Follow the steps in How do I complete Intake Documents?. If you have documents that were completed on paper that need to be scanned in to SmartCare, see How do I scan a document into the client's record? If you need additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).

## How do I view who's on the client's treatment team?

1. Make sure you have the client open. In the Treatment Team widget, click on the All link.

Role	Name
Program Assignment Staff: Outpatient MH Adult*	Clinician, Robert
<unknown role="" team=""></unknown>	Staff, Psychiatrist

- 2. This takes you to the Treatment Team list page. To add a treatment team member, **click the New icon**. This takes you to the Treatment Team Details screen. Select what type of contact person this is.
- 3. If the person you're adding is a SmartCare user, select Staff.
  - a. Enter the staff's name and select them from the search results. This will pull forward any information, such as phone number or address, that's tied to the staff in their staff set-up.
  - b. Enter the start date, which is when this person became a member of the treatment team.
  - c. Enter their role as well as what program they work in.
  - d. Add any comments.
  - e. Click Save.

reatment Team Details		😌 🐣 🛅 🗋 🖬 Save 🗙
Treatment Team		e
Treatment Team Member	3	
O Contact	O External	Active
Start Date 01/17/2023	End Date 🖮 🕶	
Role Nurse V	Program Outpatient MH Adult-12/30/2 V	
Phone Numbers	Addresses	Comments
Phone Number: 7605783774		

### 4. If the person you're adding is a contact person that's already in the Client Information screen, select Contact.

- a. Select the contact person from the dropdown list. This will pull forward any information, such as phone number or address that has been entered for them in the Client Information screen.
- b. Enter the start date, which is when this person became a member of the treatment team.
- c. Enter their role.
- d. Add any comments.
- e. Click Save.

Т	reatmei	nt Team Details					<b>9</b> 4\$ iii 🗅 🚺	Save ×
	Treatment	t Team					e	
4	Treatme	nt Team Member						
Y	O Contac	t b	🔿 External		◯ Staff		Active	
	Start Date	01/17/2023 🛗 🗸	End Date	<b>₩ -</b>				
	Contact	Anderson, Bob	~					
	Role	Family/Friend		utpatient MH Adult-12/30/2 🗸				
			С					
	Phone N	umbers		Addresses		Comment	5	d
				Home: 123 Erhardt St heavy	ton, CA 90001			
	L			L				

- 5. If the person you're adding is an external resource, that has not yet been added to the Client Information screen, select External.
  - a. Enter the information, including name, role, start date, organization, and contact information.
  - b. Click Save.

reatment	Team Details							⊖ ^₿
Treatment T	eam							b
Treatment	Team Member			5				a
◯ Contact			External		◯ Staff			Active
Start Date	01/17/2023 🛗 🕶	E	Ind Date	iii ▼				
First Name		L	ast Name		Suffix	~		
Role		► P	rogram	Outpatient MH Adult-12/30/2 🗸				
Email								
Organization								
Phone Nu	nbers			Addresses			Comments	
Business				Home 🔽				
Business 2								
Fax								
Home				Mailing				
				De	etails			

6. **To edit or remove a treatment team member, click on their name from the Treatment Team list page**. This takes you to the Treatment Team Details page.

reatment Team (2)						9☆★≛□?
All Roles	Active	<ul> <li>As of 01/2</li> </ul>	1/2023			Apply Filter
Treatment Team M 6	Role		Phone	Start Date	End Date	Status
Staff, Psychiatrist			(888) 123-4567,	12/31/2022		Active
Clinician, Robert	Program Assignme	nt Staff: O	(760) 578-3774	12/30/2022		Active

- a. To remove a treatment team member, make sure to add an end date and de-select the "Active" checkbox.
- b. Once you've finished making your changes, click Save.

nt Team Details				🕒 i ^฿ 🛅 🗋 🖬 Save
Team				b
nt Team Member				
t	🔿 Externa	al	Staff	a Active
12/31/2022 🛗 🕶	End Date	iii -		
Staff, Psychiatrist				
Psychiatrist 🗸	Program	Outpatient MH Adult-12/30/2 🗸		
umbers		Addresses		Comments
ber: 8881234567		1610 Arden Way Suite 175		
ber: (760) 578-3774				
	Team It Team Member It I2/31/2022  To v Staff, Psychiatrist Psychiatrist Umbers Umbers	Team It Team Member It I2/31/2022  C Externa I 12/31/2022  Psychiatrist Psychiatrist Psychiatrist Psychiatrist Psychiatrist Imbers Imbers It I I I I I I I I I I I I I I I I I I	Team         nt Team Member         12/31/2022 <ul> <li>External</li> <li>End Date</li> <li>Feychiatrist</li> <li>Program</li> <li>Outpatient MH Adult-12/30/2 </li> </ul> umbers       Addresses         hber: 8881234567       1610 Arden Way Suite 175	Team         nt Team Member         12/31/2022 <ul> <li>External</li> <li>End Date</li> <li>End Date</li> <li>Staff, Psychiatrist</li> <li>Program</li> <li>Outpatient MH Adult-12/30/2 ×</li> </ul> umbers         hber: 8881234567

## How do I request authorization for services?



## Life Cycle of the Client: Discharge

As the client progresses through treatment, their services will begin to diminish. In this section, we will cover how discharge a client from a program, as well as how to transfer a client from one program to another.

## How do I close a client to a program?

- 1. Make sure you have the client open. Then click the Search icon.
- 2. Type in "Client Programs" in the search bar.
- 3. Click on "Client Programs (Client)" in the search results.

### <mark>screenshot</mark>

4. This brings you to the Client Programs list page. **Select the program** you want to close to by clicking on the link in the Status column.

### screenshot

- 5. This brings you to the Program Details screen.
  - a. Change the status to "Discharged". This unlocks the Discharge Date field.
  - b. Enter the Discharge Date.
  - c. Click Save. You're now finished.

### <mark>screenshot</mark>

## How do I get a summary of care?

A Summary of Care is a document that pulls information from different places in the client's chart.

- 1. Make sure you have the client open. Click the Search icon.
- 2. Type in "Summary of Care" in the search bar.
- 3. Click on "Summary of Care (Client)" in the search results.

#### <mark>screenshot</mark>

- 4. Select your program from the dropdown menu.
- 5. Click OK.

CDAG Program Enrollment			
Select Program Enrollment Outpatient MH Adult-12/30/2022			
OK Cancel			

- 6. This opens the Summary of Care document. Enter the parameters for your summary of care.
- 7. Click Sign. This produces a PDF, which includes information from the client's chart.

Summary of Care	🖹 : 🎝 🖄 😋 GOTO 🏝 🧞 🕅 🖶 🗅 🖬 Save 🗙
Effective 01/16/202 🗮 Status New Author Clinician, Robert	
General	
From: 💼 🔻 To:	
Type Outpatient Inpatient Primary Care	
Confidentiality Code  ONormal  Restricted  Very Restricted	
Who is the provider? Location	
v v	

## How do I get a discharge summary?

A Discharge Summary is a document that pulls information from different places in the client's chart.

- 1. Make sure you have the client open. Click the Search icon.
- 2. Type in "Discharge Summary" in the search bar.
- 3. Click on "Discharge Summary (Client)" in the search results.

<mark>screenshot</mark>

- 4. Select your program from the dropdown menu.
- 5. Click OK.

CDAG Program Enrollment			
Select Program Enrollment          Outpatient MH Adult-12/30/2022         OK         Cancel			

- 6. This opens the Summary of Care document. Enter the parameters for your summary of care.
- 7. Click Sign. This produces a PDF, which includes information from the client's chart.

Discharge Summary	🗳 : 🎝 🖄 😔 GOTO 🚢 🧞 🖬 🖶 🗅 🖬 Save 🗙
Effective 01/16/202 🗮 Status New Author Clinician, Robert	<ul> <li>✓ O O Sign O &lt; +</li> </ul>
General	6
From: 🗎 🖛 To:	
Type Outpatient Inpatient Primary Care	
Confidentiality Code 💿 Normal 🔵 Restricted 🔵 Very Restricted	
Who is the provider? Location	
× · · · ·	
L	
# **Privacy and Consents**

Information in SmartCare is generally considered confidential. There are multiple laws and regulations that programs must follow, depending on their specific treatment services. However, the client can provide consent to share information. This section reviews these topics, as well as the documents utilized to record a client's consent.

## **Clinical Access Data Group (CDAG)**

SmartCare includes both mental health and substance use disorder treatment records. In order to abide by Title 42 of the Code of Federal Regulations, part 2 (42 CFR), SmartCare uses Clinical Access Data Groups, or CDAG, to limit what users can see. Your CDAG will be determined by the programs you work in and are set up by your system administrator.

Most of the time you are creating a document in the system, you'll have to select which program that document is associated with. This allows the system to limit viewability of client documents based on a user's CDAG.

You'll still be able to search for any client, as some may not be open to any programs yet, and some might be open to programs that you don't have access to. This minimizes the option of creating duplicate clients in SmartCare. However, once in a client's chart, you'll only be able to see information related to programs that are included in your CDAG.

## How do I know what CDAG I have?

Your System Administrator will set up your CDAG and which programs you are able to see. CalMHSA recommends three basic CDAG options:

- 1. Mental Health CDAG Includes all Mental Health programs; would be assigned to mental health staff.
- 2. Substance Use Disorder CDAG Includes all Substance Use treatment programs; would be assigned to substance use treatment staff.
- 3. Administration CDAG Includes all programs in SmartCare; would be assigned to any staff that provide administrative support, such as billing, medical records, quality improvement, and management.

Your county may employ additional groupings, based on how your county is set up. They may also limit which programs you are able to see, even if they're within the same CDAG.

## What happens if I work in both SUD and MH programs?

If you work in multiple programs, your system administrator will assign you multiple CDAGs. In this case, when you log in you'll select which CDAG you're logging in under. This will ensure that you're only able to see client information based on the role you're currently serving. This would also be the case if you work at two different agencies that have access to SmartCare.



## What if the client wants me to be able to talk to other programs/people/agencies?

Best practices mean coordinating care with all of a client's providers, as well as other agencies and persons the client is working with. However, due to privacy rules, there are some limitations on what a provider can share with these entities. This is all based on the client's preferences. The client can consent to you sharing treatment information. This is generally known as a Release of Information or an Authorization to Disclose Protected Health Information. Historically, each entity you want to exchange information with requires a separate Release of Information/Authorization to Disclose Information. This is still the case when you're exchanging information with an agency or person that doesn't have access to your county's instance of SmartCare. However, CalMHSA has created a disclosure authorization that encompasses all persons and agencies who have access to your county's instance of SmartCare. If signed, this allows county programs to better coordinate care for the client.

Note that this Coordinated Care Consent only authorizes the exchange of information within your county's instance of SmartCare. Other counties using SmartCare are not included in this authorization, nor are agencies who also use their own instance of SmartCare. This consent also does not authorize the exchange of information with all providers or agencies the client is working with. Standard Releases of Information/Authorizations to Disclose Information are needed in these cases.

Redisclosure: Just because you have access to 42 CFR information because the client signed the Coordinated Care Consent does NOT give you permission to redisclose information from SUD programs.

## What happens when a client signs the Coordinated Care Consent?

By default, SmartCare enforces privacy regulations, including HIPAA and 42 CFR. This means that people working in mental health programs are not able to see any of the client's treatment information for substance use programs and vice versa. This limitation is enforced by each user's CDAG. In essence, there is a wall between CDAGs.

When a client signs the Coordinated Care Consent, this wall is removed. Users will be able to see *all* the client's treatment information, regardless of their CDAG. This includes historical information and future appointments. You'll still be required to select your program when creating a new document. This is to ensure that all documents are appropriately sorted in case the client revokes their consent, as is their right.

#### What happens when a client revokes their Coordinated Care Consent?

When a client has signed a Coordinated Care Consent, all SmartCare users can see all of the client's information. Basically, the CDAG rules drop, allowing users to view information regardless of their CDAG. When a client revokes their Coordinated Care Consent, the system will re-impose all CDAG rules. This means that information you previously were able to view will no longer be visible to you. You won't see any redaction marks; you simply won't be able to find any indication that the information was ever in the system.

### Will I be alerted if a client revokes a consent?

You will not be alerted if a client revokes a Coordinated Care Consent, as that would defeat the purpose of keeping information separate. However, you will no longer be able to see information outside of your CDAG.

If the client revokes a standard Release of Information/Authorization to Disclose Confidential Information (ROI/ADCI), you can create a flag to notify other treatment team members that the client no longer allows sharing with that entity. They will only be able to see information in their CDAG, which may not include your flag or the ROI/ADCI.

# **Coordinated Care Consent & Authorizations to Disclose Information**

#### How do I complete a Coordinated Care Consent?

- 1. You must first have the client open, click the Search icon.
- 2. Type Coordinated Care Consent into the search bar.
- 3. Click to select Coordinated Care Consent (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.



6. Most of the consent is wording. Review this with the client.

Coordinated Care Consent 6
Effective 01/16/20 🗮 Status New Author Rowe, Charla V 01/09/2023 😔 Sign 💿 <
General
General
Authorization for the Disclosure of Health and Other Personal Information By signing this form below, you will allow certain organizations and individuals to use and share your health and other personal information for purposes related to your treatment and care. They will be able to share your information through an electronic health record system maintained by the California Mental Health Services Authority called SmartCare.
1. Who will share my information if I sign? By signing, your information may be shared by and with any of the following that provide services to you ("your providers") and which are connected to SmartCare:
<ul> <li>Health care providers, such as doctors, hospitals, and pharmacies.</li> <li>Mental health providers and substance use disorder providers.</li> <li>School-based providers, such as nurses, social workers, and counselors.</li> <li>California county health care agencies.</li> <li>Housing providers, that is, nonprofits that help people find a home.</li> <li>Any pilds or prisons that provides services to you while you're incarcerated.</li> <li>Any child welfare agencies that are actively involved in your or your child's case.</li> </ul>
Your providers also include any health insurers that provide you with coverage (see attached for list), including any of your mental health plans.
2. Will my providers be able to use and share my information for any reason? No, your providers can only use and share your information for limited purposes. Your providers may use and share your information to provide you with medical or behavioral health care, to coordinate your care, to determine how much should be paid for services provided to you, or to improve the quality of care.
3. What types of information about me may be shared if I sign? Your providers may share the following types of information about you:
<ul> <li>Medical information, such as information about illnesses, injuries, medical treatments, allergies, medications, X-rays, blood tests, and your HIV status.</li> <li>Behavioral health information, such as any mental health conditions or alcohol or drug use disorders you may have, which could include information on your substance use history and medications, diagnoses, and drug test results.</li> <li>School services information, such as an Individualized Education Program, and any records of medical or behavioral health services provided in schools.</li> <li>Housing service information including, if you are incarcerated, when you are scheduled to be released.</li> <li>Child welfare records, including any family reunification or maintenance plan.</li> </ul>
4. Can I obtain a list of providers who saw my information? Yes, can obtain a list of providers that have received some types of your information by contacting [County contact info].

7. The Client Information section will pull information from the Client Information screen. You do not need to add any information here. If you need to update the information, we recommend doing that in the Client Information Screen.

rst Name	Manual			Last Name	Training
ate Of Birth	06/07/2002	<b>≡ -</b>		Email	
ontact		~		Relation	~
Phone Numbers				Addresses	5
		DNC 🚯	DNLM 🚺	Home 💌	
Home 💽 (916	6) 555-7878				
Business 💽					
Business 2 💌				Billing	
Fax 💌					Details

- 8. In the Consent section, the client should indicate whether they want to consent to sharing information within SmartCare or not.
  - a. Selecting "Yes" will allow the sharing of information across SmartCare. Selecting "No" will keep the information users see limited to their CDAG.
  - b. The Start Date will automatically populate to today's date. We recommend leaving the Expiration Date blank, unless the client explicitly indicates that they would like this consent to last for a short time.

Consent 8	
I give consent for sharing of information across all services within the CalMHSASmartcareTrain   09-21-2022 behavioral health network. 💽 Yes 🔿 No	
Start Date 01/16/2023 🛗 🔻 Expiration Date 🛗 🗸	

- 9. If the client wants to keep their chart private from specific individuals, you can add them in Restricted Staff. You can enter more than one staff as needed.
  - a. Type the staff's name in the Restricted Staff box. This will search for users. Select the appropriate staff from the search results.

Client Identified	Restrictions	9
Restricted Staff	Robert	
	Clinician, Robert	
	No data to displa	ay
	r restrictions of sharing my data. T is data as specified in the text.	his will prompt a review by the CalMHSASmartcareTrain   09-21-2022 Privacy Officer. This does not guarantee

b. This will add the user to the form. If you selected the incorrect user, you can click on the Delete icon to remove them from the form.

Client Identified	Restrictions
Restricted Staff	
bX	Clinician, Robert
×	Staff, Nurse
	restrictions of sharing my data. This will prompt a review by the CalMHSASmartcareTrain   09-21-2022 Privacy Officer. This does not guarantee s data as specified in the text.

10. There is also a text box if the client wants additional restrictions. This will send a notification to the Privacy Officer, as denoted in SmartCare, to contact the client to discuss the limitations the client is requesting.

Client Identi	fied I	Restrictions
Restricted Sta	ſf	
	×	Clinician, Robert
10	$\times$	Staff, Nurse
		restrictions of sharing my data. This will prompt a review by the CalMHSASmartcareTrain   09-21-2022 Privacy Officer. This does not guaran s data as specified in the text.

11. Click Sign.

ľ:	よ 🖞 😫 Gotto 💄	🕹 🛅 🖶 🗋 🖬 Save 🗙
)1/09/2023	00	Sign 💿 < 🕂

12. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.

E : 2	🕼 🖄 \varTheta GoTo 💄 🧞 ј	i 🛅 🖶 🗋 🖬 Save 🗙
01/09/2023	00	Sign 🖍 🕂

- 13. This opens the signature details. Select the client and/or guardian from the Signer field. You will need to select each cosigner one at a time, so repeat these steps as needed.
- 14. Click Co-Sign.

Coordinated Care Co	nsent		🗳 : 🎝 🖄 🖨 Goto 🛔 🧞	i 🛅 🖶 🗋 🖬 Save 🗙
Effective 01/16/2023	Status Signed	Author Rowe, Charla	01/09/2023	Sign 📝 🗲 🗕
Other Versions	Signed By	Signer	13	Program
● 1. <u>01/16/2023,</u>	<b>2</b> 1.01/16/2023 (1)	4dd Signer(s) Co-Sign	OX Training, Manual     Decline	Outpatient MH Adult-01/3 ¥

- 15. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan a document into the client's record?
  - a. Select the method of capturing the signature.
  - b. Once the co-signer is happy with their signature, **click the Sign button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
  - c. If the cosigner needs to start over, click the Clear button to erase the current signature.

SignaturePage	? ×
13 Training, Manual is signing the Coordinated Care Consent	
Training, Manual 01/16/2023 1:16 PM	
🔘 Password 💿 Signature Pad 🔵 Mouse/Touchpad 🔵 Client Signed Paper Document 🔵 Verbally Agreed Over Phone	
b	
Sign Clear Cancel	

Once signed by all required people, you are finished.

## What do I do if the client wants to revoke their Coordinated Care Consent?

1. To revoke a Coordinated Care Consent, simply create a new Coordinated Care Consent but mark "No" in the Consent section. This will automatically add an end date to the previous Coordinated Care Consent.

Consent				1	
I give cons	ent for sharing	of infor	mation across all ser	ces within the CalMHSASmartcareTrain   09-21-2022 behavioral health network. OYes ONO	
Start Date	01/16/2023	<b></b>	Expiration Date	<b>⇒</b>	

#### Where can I find out if the client has signed a Coordinated Care Consent?

The easiest way to find out if the client has a Coordinated Care Consent is to search for the document using the Search icon. If there is a Coordinated Care Consent already signed in a CDAG that you can view, the PDF will pull up. If not, it will take you to a blank new Coordinated Care Consent.

- 1. You must first have the client open, click the Search icon.
- 2. Type Coordinated Care Consent into the search bar.
- 3. Click to select Coordinated Care Consent (Client).



## How do I complete a Release of Information (Authorization to Disclose Confidential Information)?

- 1. You must first have the client open, click the Search icon.
- 2. Type Release of Information into the search bar.
- 3. Click to select Release of Information (Client).

	21-2022 Test, Client (1170)	ATP 📋	<b>0</b> + ×
Q release			3
S Release of	Information (Client)	<b>X</b>	

- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.



6. **Complete the Release To/Release From section.** Make sure to select whether this authorization is to allow you to release information to this entity and/or obtain information from this entity.

Release To/Release	From						
Name or Other Specific Ide	entification of Person(s)	authorized	to receive/ ma	ke the requ	uested use or dis	closure:	
Organization/Provider	Contact Open C	ontacts	Type 🔽 Re	lease To	🗹 Obtain From		
Release To/From	Training, Spouse	~				6	
Contact Type		~				$\sim$	
Organization							
Name	Training, Spouse						
Address	123 Oak Street						
City	Sacramento		State	California	~	Zip	95555
Phone	(916) 555-9999		Fax Number				

a. If the person you're completing this release for is already entered as a contact in the Client Information Screen, select "Contact" and then select the person from the drop down list "Release To/From". This will bring in the contact person's information.

Release To/Release F	rom		Release To/Release From	
Name or Other Specific Iden	tification of Person(s) authorized	to rece	Name or Other Specific Identification of Person(s) authorized	to re
Organization/Provider	Open Contacts	Туре	Organization/Provider Ocontact Open Contacts	Ту
Release To/From	~	·	Release To/From Training, Spouse 🗸	·]
Contact Type	Training, Spouse		Contact Type	·
Organization	- in the second s		Organization a	]
Name			Name Training, Spouse	
Address			Address 123 Oak Street	
City		State	City Sacramento	s
Phone		Fax I	Phone (916) 555-9999	E

 b. If you're completing a release for an organization, such as Social Services or a school, select "Organization/Provider". This opens a button next to the Release To/From field. Clicking this brings up a pop-up window where you can enter the organization's information. Click save. This will push this information to the ROI and save this information for future ROIs. Enter the organization's information.

Release To/Release F	Release To/Release From										
Name or Other Specific Identification of Person(s) authorized to receive/ make the requested use or disclosure:											
Organization/Provider Contact Open Contacts Type Release To Obtain From											
Release To/From	b										
Contact Type	×										
Organization	Local Recovery Clinic										
Name											
Address	321 Sycamore Road ,										
City	Sacramento	State	California 🖌	Zip	95555						
Phone	(916) 555-3333	Fax Number	(916) 555-2222								

c. If you're completing a release for a contact person that is not currently entered as a contact in the Client Information Screen, selecting "Contact" will create an opportunity to select the button "Open Contacts". This will take you to the Client Information Screen, where you can add additional contact.

Release To/Release Fr	om				
Name or Other Specific Ident	ification of Person(s) authori	receive/ mal	ke the requested use	or disclosure:	
Organization/Provider	Contact Open Contacts	Type 🗌 Rel	ease To 🗌 Obtain	From	
Release To/From					
Contact Type	~				
Organization					
Name					
Address					
City		State	~	Zip	
Phone		Fax Number			

- 7. Complete the Purpose of Disclosure section. Most authorizations to disclose information are for treatment and/or care coordination, but others may apply. Select the appropriate boxes. If you select "Other", make sure to clarify.
- 8. **Complete the Expiration section**. The start date automatically fills with today's date. If you don't change anything in this section, the document will automatically expire 1 year from today's date.
- 9. Complete the Information to be Used or Disclosed section. Select all records that are authorized for disclosure per the client's request.
  - a. If the client requests that only records from a certain time frame be shared, include the start and end dates.

Purpose of Disclosure		
Quality Improvement Treatment/Care Coordination	Health insurance reimbursement Other	
Expiration		
If nothing marked - one(1) year from date signed		8
1 time disclosure     6 months	End of Agency Treatment	
Start Date 01/16/2023 🛗 ▼ End Date	<b></b>	
Information to be Used or Disclosed The information that can be disclosed under this author ROI Type General	ization includes the following, if available	9
All records	Acknowledgement of Treatment	Billing &/OR Insurance Information
Intake/Admission Information	Psychological Evaluation(s) Reports	Medical History, Lab Results, Immunizations Records
Medications Prescribed	Discharge Summary/Plan	Progress Review/Summary
Screening Assessment(s)	School Records/Reports/IEPs	Treatment Plan(s)
Progress Notes	Legal Documents (specify)	
Other		
Records Start Date 💼 🖛 Record	s End Date	

- 10. If the client wishes to put any restrictions on this authorization, enter those in the Restrictions section.
- 11. The terms section provides the client with information about the authorization they're signing. Make sure to **check both boxes** to demonstrate you've reviewed this information with the client.

Restrictions
Terms
Terms. I understand:
<ul> <li>The recipient(s) of my confidential information may share it with others if they are permitted to do so under federal and state law. I understand that in some cases my information may no longer be subject to privacy laws once it is shared.</li> <li>I have a right to revoke this form at any time by contacting the source of my confidential information. I understand that if I revoke, the recipient(s) of my information may keep the information that they received about me prior to the date I revoked.</li> <li>Signing this form is voluntary, and that declining to sign this form will not impact my ability to get medical care, health insurance, or any government benefits.</li> <li>Even if I don't sign this form, the recipient(s) may have a right to obtain my confidential information under applicable law.</li> </ul>
Signing for a Child. I understand that if I am signing this form on behalf of a minor, I should include my name as the "Legal Representative" of my child, and that I should sign this form on the last line. If my child is 12 or older, my child should also sign on the first line.
By checking these boxes, I agree that I have read, understand and agree to these terms.
NOTICE TO CLIENT: By signing below, I consent to the disclosure of my information as described in this form. Further, by including my phone number below, I consent to the receipt of texts or calls to communicate with me about my consent and how my information may be shared (standard message and data rates may apply).
C ACCESS TO MY RECORD: I have a right to obtain a copy of this form. I understand I should ask the person who presented this form to me for a copy.

- 12. Enter your agency's information in the Agency Contact Information section.
- 13. The Other section allows you to document if the client received or declined a copy of the document. It also allows you to document how you verified the client's identity as the appropriate person to sign this document.
- 14. **The Additional information section must be completed** to document the disclosure of certain types of information. The client must opt to either authorize or prohibit each of these specialty types of information.

Agency Contact Inforn	nation
Program	✓ Attention
Address	
City	State V Zip
Phone	
Other	13
Copy Given to Client 🔵 Ye	s 🔘 Declined a copy Agency Staff
ID Verified By Drive	er's License Other Picture ID Known to Agency
Additional information	14
	leased may contain alcohol and drug abuse information and/or information about Human Immunodeficiency Virus (HIV), Acquired e (AIDS), and AIDS Related Complex (ARC).
	information relating to referral and/or treatment for alcohol and drug abuse. of information relating to referral and/or treatment for alcohol and drug abuse.
<ul> <li>I authorize the release of</li> </ul>	<b>tted Disease/Communicable Disease</b> information relating to HIV/AIDS/sexually transmitted disease/communicable disease. of information relating to HIV/AIDS/sexually transmitted disease/communicable disease.

15. Click Sign to complete and generate the document.



16. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.



- 17. This opens the signature details. Select the client and/or guardian from the Signer field. You will need to select each cosigner one at a time, so repeat these steps as needed.
- 18. Click Co-Sign.



19. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the

document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan a document into the client's record?

- a. Select the method of capturing the signature.
- b. Once the co-signer is happy with their signature, **click the Save button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
- c. If the cosigner needs to start over, click the Clear button to erase the current signature.

Signat	turePage					? ×
1	9	Training, Manual is sign	ing the Coordinated Ca	re Consent		
		Training, Manual	01/16/2023	1:16 PM	a	
	Password	Signature Pad 🔘 Mouse/Touchpad 🤇	Client Signed Paper	Document	O Verbally Agreed Over Phone	
	b					
	Sign	Clear Cancel				

Once signed by all required people, you are finished.

# What do I do if the client wants to revoke a Standard Release of Information/Authorization to Disclose Information?

- 1. With the client open, **click the Search icon**.
- 2. Type in "Client Information" in the search bar.
- 3. Select "Client Information (Client)" from the search results.



- 4. Navigate to the Release of Information Log tab.
- 5. You can view the current releases on file in the List of Releases section.

		4				,	🕽 🌣 i 🍄 🖬 Save
	01	tacts Release	of Information Log	Financial	Primary Care	Referral External Referral	Hospitalization
lliases Fan							
lient Relea	ses						
Release To	Select Release	То		✓ Star	t Date	tii ▼ End Date	<b></b> •
						Remind	Days Before End Date
Comment				Att	ach Release Doc	ument	
				Doc	ument Attached		
5 –							
5							Insert Clear
ist Of Relea	ises 🔽 Show only r	eleases that are c	urrently effective				
	Release To Name	Start Date	End Date	Release Documents	Reminder Days	Comment	
		01/16/2023	01/16/2024	Release of Inf			Revoke

6. To revoke an authorization, select it from the List of Releases section, then click the Revoke button.

ist Of Releases Show only releases that are currently effective										
6	Release To Name	Start Date	End Date	Release Documents	Reminder Days	Comment	6			
× o 🛛 🖻	Training, Sp	01/16/2023	01/16/2024	Release of Inform	m		Revoke			

7. BUG – button is currently locked.

### How can I find out what disclosure authorizations the client has signed?

To view the client's list of current disclosure authorizations on file, open the Client information screen and navigate to the Release of Information Log tab.

- 1. With the client open, click the Search icon.
- 2. Type in "Client Information" in the search bar.
- 3. Select "Client Information (Client) from the search results.



- 4. Navigate to the Release of Information Log tab.
- 5. You can view the current releases on file in the List of Releases section.

ent Inf	orma	tion	4					6	• i '	Save
General		raphics Cont		of Information Log	Financial	Primary Care	Referral Exte	ernal Referral	Hospitaliz	zation
	Family	_								
Client Re	leases									
Release To		Select Release	То		✓ Sta	art Date	<b></b>	End Date		<b>iii -</b>
							Re	mind	Days Befor	re End Date
Comment					A	ttach Release Doci	ument			
					Do	cument Attached				
5										
									Insert	Clear
ist Of Re	leases	Show only r	eleases that are c	urrently effective						
		Release To Name	Start Date	End Date	Release Documents	Reminder Days	Comment			
XO	<u>-</u>	Training, Sp	01/16/2023	01/16/2024	Release of Ir	form				Revoke

## **Other Consents**

There are multiple types of consents that a client may complete as part of their treatment. SmartCare currently includes the following consent forms:

- 1. Consent to Treat (sometimes called "Informed Consent")
- 2. Consent to Telehealth
- 3. Consent to Email Communication
- 4. Consent to Text Communication

The Consent to Treat includes information about limits of confidentiality, working as a registered associate, privacy practices, and about processes such as the grievance and appeal process.

Other consent-like documents, such as Admission Agreements or Advisements are custom for each program. For this reason, these documents are currently done on paper and scanned into the client's chart.

## Where can I see what consents a client has signed?

- 1. You must first have the client open, click the Search icon.
- 2. Type "Consents" into the search bar.
- 3. Click to select "Consents (Client)" from the search results.



4. This brings you to the Consents list page, where you can see what consents the client has on file. To view the document itself, simply click on the document's name to view the PDF version of it. Note: you'll only be able to view consents that are in your CDAG.

Consents (2)				REVOKI CONSET	T CONSENT	<b>9</b> ☆ ★ <b>±</b>	, <b>\$</b> (8
All Consent Document	► Effective From	<b></b>	Effective To	<b></b>		Apply Filter	
Consent	△ Client Signed	Start Date	End Date	Revoked	Comments		
Consent For Telehealth	Yes	01/16/2023					-
Consent For Text Communication	Yes	01/16/2023					

#### How do I complete a consent form?

- 1. You must first have the client open, click the Search icon.
- 2. Type the name of the consent into the search bar.
- 3. Click to select the appropriate consent from the search results.



- 4. In the CDAG Program Enrollment window pop-up, click the drop down and click to select the appropriate program.
- 5. Click OK to continue.



- 6. The consent document will open. **Review the consent with the client**. The example used below is the Consent for Telehealth.
  - a. There will be a start date and end date field, if needed. The start date will automatically populate with today's date. We recommend leaving the end date blank.

onsent for Telehea	lth			E : (	🗤 🖄 😫 Goto 🚢	🎝 🛅 🖶 🗋 🖬 Save
Effective 01/16/2023	Status New	Author	Rowe, Charla	~	00	Sign 💿 < 🕇
General			а			
itart Date 01/16/202	3 🛗 🔻 End Date	l l	•			
acceptable mode of deliv following statements reg • Telehealth service	telehealth services from [coi ering health care related ser arding telehealth: is include the use of video tele	vices to me in accor	dance with the te	rms of this cons	sent form. I understan	ad and agree to the
my provider will n • Telehealth service • The treating provi • All the information	n from a distant location. Tele ot be physically in my presenc is will be provided to me for pu der performing the examination n discussed via telehealth is he	e. urposes of evaluation on or treatment will k eld to the same priva	, diagnosis, manag eep a record of the cy standards as th	gement, and trea consultation in at of an in-perso	atment. my electronic healthca on appointment.	are record.
telehealth service • There are risks, be interruption and/c • When using my ow	whatever reason telehealth is n s at any time without affecting enefits, and consequences ass or breaches of confidentiality b vn personal electronic device, Jevice. I understand that infor	g my right to future ca ociated with telehea y unauthorized perso [county] does not ha	are, services, or pro lth, including but n ons, and/or limited ve any control or a	ogram benefits t ot limited to dis ability to respo uthority over th	o which I would otherw ruption of transmission nd to emergencies. e protection of my heal	vise be entitled. n by technology failures,
written authorizat consent. Such rec • Although my provi	closed within sessions and wr ion, except where the disclosu ordings are for staff training pr ider may need to contact my e ender in-person emergency as	ure is permitted and/o urposes only, are not mergency contact an	or required by law. part of the medica id/or appropriate a	Audio/visual re al record, and ar authorities in cas	cording may be allowed e destroyed after inten se of an emergency, I u	d with a separate written ded use.

7. Once ready, click Sign.



8. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.

_				
	dler.axd			
Document				8
Effective 01/18/2023		Author Staff, Access	00	Sign 🔽 🛃 🛛
				i 🛅 🖶 🗋 🖬 Save

- 9. This opens the signature details. Select the client and/or guardian from the Signer field. You will need to select each cosigner one at a time, so repeat these steps as needed.
- 10. Click Co-Sign.

Signer		9
Add Signer(s)	~	X Training, Manuel
Co-Sign	Decline	-
10		

- 11. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan a document into the client's record?
  - a. Select the method of capturing the signature.
  - b. Once the co-signer is happy with their signature, **click the Sign button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
  - c. If the cosigner needs to start over, click the Clear button to erase the current signature.

SignaturePage					? ×
(11)	Training, Manuel is	signing the Consent for	Telehealth		
a Training, M	anuel	01/18/2023	6:13 PM		
Password     Signature Pad				Verbally Agreed Over Phone	
b					
Sign Clear	Cancel				
Password Signature Pad	Mouse/Touchpad	01/18/2023 Client Signed Pape	6:13 PM Pr Document	O Verbally Agreed Over Phone	

Once signed by all required people, you are finished.

## A client wants to revoke a consent. What do I do?

- 1. You must first have the client open, click the Search icon.
- 2. Type "Consents" into the search bar.
- 3. Click to select "Consents (Client)" from the search results.



4. This brings you to the Consents list page, where you can see what consents the client has on file. To view the document itself, simply click on the document's name to view the PDF version of it. Note: you'll only be able to view consents that are in your CDAG.

Consents (2)					REVOK	E CONSENT	<b>9</b> ☆★ <b>±</b>	<b>\$</b> ×
All Consent Document	~	fective om	<b></b>	Effective To	<b></b>		Apply Filter	
Consent	Δ	Client Signed	Start Date	End Date	Revoked	Comments		
Consent For Telehealth		Yes	01/16/2023					<b>^</b>
Consent For Text Communication		Yes	01/16/2023					

- 5. Select the consent you want to revoke.
- 6. Click the "Revoke Consent" or "End Consent" button.
  - a. Revoking a Consent removes the consent.
    - b. Ending the consent adds an end date to the consent.

Consents (2)			CONSENT X	
All Consent Document	← Effective From	Effective To	<b>•</b>	Apply Filter
Consent	△ Client Signed	Start Date End Date	Revoked Com	ments
Consent For Telehealth	Yes	01/16/2023		*
Consent For Text Communication	Yes	01/16/2023		

# **Clinical Documents**

In this section, we'll review the documents that are clinical in nature.

## **Mental Status Exam (MSE)**

The Mental Status Exam, or MSE, is a document that's often included in other clinical documents as a tab, but the standalone form is also available.

- 1. You must first have the client open, click the Search icon.
- 2. Type Mental Status Exam into the search bar.
- 3. Click to select Mental Status Exam (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG	Program Enrollment	<u>?×</u>
	Select Program Enrollment	4
	MH Screening-10/03/2022	~
	5 OK Cancel	

- 6. The Mental Status Exam document will open. **Complete the document.** If a previous MSE was completed, it will pull forward the most recent information. Otherwise, all sections will default to "Not Assessed."
  - a. If you did not assess that section, select "Not Assessed." This will lock your ability to check any of the boxes.
  - b. If you find that the person is within normal limits (WNL) for a section, you can simply check the "WNL" radio button at the top of the section. This will lock your ability to check any of the boxes, as this designation covers the requirements.
  - c. Helpful Tip: If the person is within normal limits for all sections, you can select "All Within Normal Limits (WNL)"
  - d. If you assessed a section, select all options that apply. If you select "Other", make sure to complete the text field.

ental Status Exam	6		₽:	🎝 🖄 \varTheta Gotto 💄	🖧 🛅 🖶 🗅 🖬 Save 🗙
Effective 01/20/2023	Status New	Author Rowe	e, Charla 🗸 🗸	00	Sign 💿 < 🕂
Exam Mental Status Exam	C (WNL)				İ
Attitude Attentive Cooperative Uncooperative Other	Apa	sive Gua thetic Frien	rded	Not Clinically Ir Ingratiating Hostile Belligerent	andicated
Behaviors Appropriate for age Restless Inappropriate gestur Other	Assessed Not A Poor Eye Co Psychomot es Tremor	ontact Hypermoto	tor retardation	Not Clinically Ir Fidgety Inappropriate mannerisr Stereotypies	
General Appearance Poorly dressed Poor nutrition Evasive/distant	Assessed Not A     Poorly groomed     Restless     Inattentive	ssessed WNL – Appropria the occasion Disheveled Psychomotor retardation Poor eve contact	ately dressed and groome Odiferous Hyperactive/in Hostile		mities

- e. Some sections, such as Suicide/Homicide, are single select and must be completed. However, if clicking "None" then the options will mark all as "No" or grey out, depending on the section.
- f. Some sections, including the Suicide/Homicide section, also have a Comments section for you to add more detail.
- g. Some sections, such as orientation, request evidence of the clinician's determination.



- h. There is a section at the very end for additional comments. You can also use this box to summarize the MSE results.
- i. There is also a Review section. This is for MSEs that are completed frequently. This allows you review the most recent MSE and make minor changes without having to re-enter all the sections. You can select N/A if you started over.
- j. You can use "Not Clinically Indicated" when you're completing frequent MSEs and a section does not need to be completed every time.
- 7. Once completed, **click Sign** to complete and generate the document.

Mental Status Exam				E : 2	р 🖻 😫 GoTo 畠	. 2, i 🖶 C	Save 🗙
Effective 01/20/2023	Status New	Author	Rowe, Charla	~	00	7 Sign	
	Assessed <b>O</b> Not Asse ormal Movements	essed OWNL	🔿 Not Clir	ically Indicated			
Gait and Station	Assessed ONot Asse	essed OWNL	Not Clir	ically Indicated	<b>P</b>		
Mental status exam additio	vnal comments, Descripti	ons					
Review		leview with no changes		i O N/A			?

## **Problem List**

The Problem List is a module that is embedded in multiple documents in the system. For example, it's included in the CalAIM Assessment and most progress notes. These are all connected, so if you add a problem from one document, it will add it to the overarching Problem List and will therefore be available when you open a different document. You can also open the Problem List in a standalone manner. The Problem List is a living document, so information should not be deleted unless entered in error. You will only be able to see problems within your CDAG if the client has not signed a Coordinated Care Consent.

## How do I add a problem to the Problem List?

- 1. You must first have the client open, then **click the Search icon**.
- 2. Type Problem into the search bar.
- 3. Click to select Client Clinical Problem Details (Client).



- 4. This brings you to the Client Clinical Problem Details screen. Add a problem using the steps below. You can enter as many problems as you need to.
  - a. **Search for the problem** using the ICD-10 code, or the DSM-5 code. You can also search by typing in the Description field. You can also select from your favorites by clicking on the dropdown.
  - b. Enter the start date of the problem. This is the date the problem started, not the date you were made aware of the problem.
  - c. Select your program from the dropdown menu.
  - d. Click Insert.
  - e. This will add it to the Problem List section.

Client Clinical Problem Details					<b>9</b> ¢	i 🍄	<b>ā</b> 🗅	Save	×
Problem Details Problem Details									
Code Search B Description Search						~	ء 🖈	7	
Start Date: 01/18/2023	ate:	Program Out	patient MH Adult-0	1/13, 🗸	d Inse	ert	Clear		
SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program			e	
X 🔿 🕚 Sleeping in vehicle (finding)	224233001	Z59.0	01/16/2023		Outpatier	nt MH Ad	ult	Ĵ.	
X O Severe food insecurity on Unite	470951000124105	Z59.41	01/16/2023		Outpatier	nt MH Ad	ult		

- 5. If you made a mistake, you can select an item from the Problem List.
  - a. This brings the information to the top part of the screen. Make your edits.
  - b. When finished, click Modify.

Problem Details				
*				~
Code Z59.0 Descripti	on Sleeping in vehicle (	finding)		
Start Date: 01/16/2023 🗰 🕶	End Date:	🗎 🔻 Progra	M Outpatient MH Adult-01/1	3/ 🗸
Produktions 1 Sect				
Problem List				Modify Clear
SNOMED Description	SNOMED (	T Code ICD 10 Code	Start Date End	I Date Program
Sleeping in vehicle (find	ding) 224233003	Z59.0	01/16/2023	Outpatient MH Adult
Sleeping in vehicle (find)		)124105 Z59.41	01/16/2023	Outpatient MH Adult Outpatient MH Adult

6. If you need to simply delete a problem that was added in error, click the Delete icon next to the appropriate problem in the Problem List section.



7. When you're finished, Click Save.



#### How do I remove a problem that's been resolved?

- 8. You must first have the client open, then **click the Search icon**.
- 9. Type Problem into the search bar.
- 10. Click to select Client Clinical Problem Details (Client).



- 11. This brings you to the Client Clinical Problem Details screen. To remove a problem that's been resolved, **select the item from the Problem List section**.
  - a. This brings the information to the top part of the screen. **Add an end date**. The end date should be when the problem was resolved, not the date you learned the problem was resolved.
  - b. When finished, click Modify.

*	eping in vehicle (finding) I Date:	<ul> <li>Program</li> </ul>	Outpatient MH Adult	-01/13, 🗸		Q	\$
🛅 🔻 End	I Date:	<ul> <li>Program</li> </ul>	Outpatient MH Adult	-01/13, 🗸			
					Modify	Cl	ear
ED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program		
1	1ED Description	1ED Description SNOMED CT Code	1ED Description SNOMED CT Code ICD 10 Code	IED Description         SNOMED CT Code         ICD 10 Code         Start Date	IED Description     SNOMED CT Code     ICD 10 Code     Start Date     End Date	Modify	Modify



#### How do I add favorites to my Problem List screen?

- 1. You must first have the client open, then click the Search icon.
- 2. Type Problem into the search bar.
- 3. Click to select Client Clinical Problem Details (Client).



- 4. This brings you to the Client Clinical Problem Details screen. Search for the problem you want to add.
  - a. If it's already in the problem list, you can also select it from the Problem List section.

Problem Details							
Problem Details							
*						~	
Code Search 🚯 I	Description Search						۹ 😭
Start Date: 01/16/2023 🛗 🔻	End Dat	e: 🗰 🕶	Program (	Outpatient MH Adult-	01/13, 🗸	4	
						-	
Problem List						Insert	Clear
a SNOMED Des	cription	SNOMED CT Code	ICD 10 Code	Start Date	End Date	Program	
X 3 Sleeping in vel	hicle (finding)	224233001	Z59.0	01/16/2023		Outpatient MH	Adult
X O  Severe food in	security on Unite	470951000124105	Z59.41	01/16/2023		Outpatient MH	Adult

b. Click the Add Favorite icon.

5. You'll see a notification at the top of the screen letting you know it's been added to your favorites.



# I want to be able to sort through the client's problem list, rather than seeing just the current information. How do I do that?

- 1. You must first have the client open, then **click the Search icon**.
- 2. Type Problem into the search bar.
- 3. Click to select Client Clinical Problems (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG Program Enrollment	<b>?</b> ×
Select Program Enrollment	4
MH Screening-10/03/2022	~
OK Cancel	

- 6. This takes you to the Client Clinical Problems list page.
  - a. Use the filters at the top to find what you're looking for.
  - b. Start Date is required.
  - c. After entering in your filters, you'll need to click "Apply Filter".

lient Clinical Problems (8) 6				⊖ ☆ ★ 盐 □ ≎	₽๋₽
Start Date 01/01/2023	Program	All Programs	Include Pase     Staff	st Problems Apply Filter	
SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date End Date	Program	
Severe food insecurity on United States household foo	470951000124105	Z59.41	01/04/2023	Outpatient MH Adult	
Rapid cycling bipolar I disorder (disorder)	<u>133091000119105</u>	F31.9	01/03/2023	SUD Outpatient	
Positive screening for depression on Patient Health Qu	464481000124106	Z13.31	01/04/2023	Outpatient MH Adult	
Desophageal varices due to cirrhosis of liver caused by	897005004	K70.30	01/04/2023	SUD Outpatient	
Methamphetamine abuse (disorder)	<u>699449003</u>	F15.10	01/04/2023	SUD Outpatient	
Housing instability due to imminent risk of homelessn	1156192009	Z59.811	01/04/2023	Outpatient MH Adult	
Cocaine dependence, continuous (disorder)	<u>191831000</u>	F14.20	01/04/2023	SUD Outpatient	

# **CalAIM Assessment**

The CalAIM Assessment is the new 7-domain assessment that DHCS initialized in July 2022. Please reference the CalMHSA <u>Documentation Guides</u> for more details on what clinical information should be included. In SmartCare, it also includes the Problem List module, allowing you to add problems directly from the assessment.

How to complete a CalAIM Assessment:

- 1. You must first have the client open, click the Search icon.
- 2. Type CalAIM Assessment into the search bar.
- 3. Click to select CalAIM Assessment (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.



6. The CalAIM Assessment document will open. **Complete the document**. All 7 domains are required.

CalAIM Assessment	🖹 🔒 🏖 🛛 😋 Goto 💄 🖬 Save	
Effective 12/22/2022 🗮 Status New Author Clinician, Robert	✓ Sign	•+
General		
6 Domain 1: List/Describe Presenting Problem(s), Current Mental Status, History of Presenting Pr	Problem(s) and Client-Identified Impairment(s)	
Domain 2: List/Describe Trauma - Indicate N/A if not applicable.		
Domain 3: List/Describe Behavioral Health History and Comorbidity		
bonan 3. Eisty beschbe benavioral meatur history and comorbiolity		
Domain 4: List/Describe Medical History, Current Medications, Medication History, and Comorb	bidity with Behavioral Health.	
Domain 5: List/Describe Social and Life Circumstances and Culture/Religion/Spirituality		
Domain 6: List/Describe Strengths, Risk Behaviors, and Safety Factors		
Domain 7: List/Describe Clinical Summary and Recommendations, Diagnostic Impression, and	I Medical Necessity Determination/Level of Care/Access	s Criteria.

- 7. Add problems to the Problem List as desired. See Problem List section for more information on how to complete the Problem List in SmartCare.
- 8. Click Sign to complete and generate the document.

IAIM A	Assessn	nent							Ē	° : 2	6 🖻 🤮	GoTo 💄	Sav	/e	0 <del>0</del> i
Effective	12/22/2022	<b>⊡</b> ▼	Status	New			Author	Clinician, Robert	~		00		Sig	in	0<
General															8
Doma	ain 7: List/De	escribe	Clinical S	Gummary	and Reco	mmendations	, Diagnos	tic Impression, and	Medical Nec	cessity De	eterminatio	on/Level of (	Care/Acce	ess Cr	iteria.
roblem	n List														
Proble	em Details	;													-
*													~		
Code	Search		1 D	escription	Search								(	Q	\$
Start D	ate: 12/22/	2022	<b>₩ -</b>		End Da	te:	<b></b>	Program M	H Screening-	10/03/20	22 🗸				
Probl	lem List											Ins	ert	Cle	ar
		SNOM	ED Desc	ription		SNOMED CT	Code	ICD 10 Code	Start Da	ite E	nd Date	Program			
							No dat	a to display				5			- 1
							NO dal	а то отъргау							

## **ASAM Assessment**

The American Society of Addiction Medicine (ASAM) has created an assessment that they simply call the ASAM Criteria. Generally, this assessment is usually just shortened to "ASAM" in the substance use treatment world. In SmartCare, the form is called "CA ASAM" to represent that this is the form the California SmartCare customers are using.

There are many different interview questions that providers use to determine the ASAM Criteria results. CalMHSA is not currently including interview questions in the EHR, as many are cumbersome and lengthy. If your county has a recommended ASAM Interview Tool, feel free to use it. DHCS also has a free ASAM Interview Tool that's available on their website. To complete the CA ASAM, follow the steps below.

- 1. You must first have the client open, click the Search icon.
- 2. Type "CA ASAM" into the search bar.
- 3. Click to select CA ASAM (Client) from the search results.



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG	Program Enrollment	<b>?×</b>
	Select Program Enrollment	4
	MH Screening-10/03/2022	~
	5 OK Cancel	

6. The ASAM document will open. In the Initial tab, enter the type of assessment this is.

A ASAM					E° : 2	o 🖄 😫 Goto 🚢 🛔	, to 🖶 🗅	Save
Effective 01/20/2023	Status New		Author	Clinician, Robert	~	00	Sign	
Initial Dimension 1	Dimension 2	Dimension 3	Dimension 4	Dimension 5	Dimension 6	Final Determination	-	i
Initial								

#### 7. Complete each Dimension tab.

- a. Each will have a section for you to **enter the risk level**.
- b. This will auto-populate the level in the General section of the tab.
- c. Enter the documented risk (low, moderate, or high).
- d. Enter your comments.

CA ASAM	🎝 🖄 \varTheta GOTO 🚢 🧞 🛅 🖶 🗋 🖬 Save 🗙
Effective 01/20/2023 🗮 🗸 Status New Author Clinician, Robert 🗸	
Initial Dimension 1 Dimension 2 Dimension 3 Dimension 4 Dimension 5 Dimension 6	Final Determination
Dimension 1: Acute Intoxication and/or Withdrawal Potential	
·	
No withdrawal risk (Level 0.5)	<b>—</b>
O Physiologically dependent on opiates and requires Opioid Maintenance Therapy to prevent withdrawal (OTP	Level 1)
○ Withdrawal, if present, is manageable at Level 1-WM (Level 1)	
○ Withdrawal, if present, is manageable at Level 2-WM (Level 2.1)	
○ Withdrawal, if present, is manageable at Level 2-WM (Level 2.5)	
O Withdrawal, if present, is currently receiving Level 1-WM or 3.2-WM services (Level 3.1)	
Withdrawal, if present, is manageable at Level 3.2-WM (Level 3.3)	
Withdrawal, if present, is manageable at Level 3.2-WM (Level 3.5)	
Withdrawal is manageable at Level 3.7-WM (Level 3.7)	
Withdrawal requires Level 4-WM (Level 4)	
General	
D	C
Level Level 0.5 Document	ed Risk 🗸 🗸
Comments	
d	?

8. Navigate to the Final Determination tab. This will pull in the information you entered in all the dimension tabs, including your comments. Enter the Final Placement Determination.

fective 01/20/2023	tatus New		Auth	or Rowe, Charla	~	00		Sign 🙆 <
nitial Dimension 1 Di	nension 2	Dimension 3	Dimension	4 Dimension 5	Dimension 6	Final Determ	ination	
mperial ASAM Final Dete	rmination							
inal Placement Determinati	<u>on</u>							
dditional Indicated Level of C	are None		✓ Second	Additional Indicate	ed Level of Care	None	~	
rovided Additional Level of C	ne None		~					8
f Actual LOC was not among t ifference?	nose indicate	d, what is the rea	son for the			ission is expected	to be delayed,	what is the
Interence?				reason for delay	·r •			
f reason was "Other", explain:				If reason was "Oth	er", explain:			

- a. Enter the Indicated/Referred Level. This is the level you think the client needs, based on ASAM criteria.
- b. Enter the Provided Level. This is the level you actually referred the client to.
- c. **Enter your comments**, including a justification if there is a discrepancy between the indicated level and the provided level.
- 9. Click Sign to complete and generate the document.

Effective (	01/20/2023	📩 Status N	lew	A	uthor Clinician	, Robert 🔹	. 00		Sign 🖉 🗲 -
Initial	Dimension 1	Dimension 2	Dimension 3	Dimension 4	Dimension 5	Dimension 6	Final Determination		9
Final Def	termination	n							-
Dimensio	n 1	Level 0.5	Risk: Low			Dimension 2	Level 2.5	Risk: Moderate	
						some risk			
Dimensior	n 3	Level 3.3	Risk: Moderate			Dimension 4	Level 1	Risk: Moderate	
some						low			
Dimensior	n 5	Level 2.5	Risk: Low			Dimension 6	Level 3.1	Risk: Moderate	
dimensior	n 5					demension 6			
Final Place	ement Detern	nination		a					
Indicated/	Referred Leve	ı		~					
Provided L	evel		~	b					
Comments									

# Child and Adolescent Needs and Strengths (CANS) Tool

The Child and Adolescent Needs and Strengths tool, or CANS, is required for youth mental health clients ages 6-20.

- 10. You must first have the client open, click the Search icon.
- 11. Type CANS into the search bar.
- 12. Click to select California CANS (Client).



- 13. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 14. Click OK to continue.



#### 15. The CANS document will open. **Complete the general information** about the CANS in the Initial tab.

- a. Enter the date of the assessment. This auto-populates to today's date, but may be changed as necessary.
- b. Select the Assessment type.
- c. Enter your program.
- d. If you're entering the CANS as a proxy for someone else, you may also change the Assessor field.
- e. Enter the client's grade.
- f. If the client does not have a caregiver, check the box. This will hide the Caregiver Resources tab.

Effective 01/18/2023	Status New		Authors					
Initial General Domains			Author	Staff, Access	~	00	Sign	0
	s <mark>(6-24) Trauma</mark>	a/Transition Ca	aregiver Res	ources				
General								
Date of Assessment	1/18/2023	a	DOB:	09/01/2002	<b>H</b>	Age: 20		
				ninistrative Close 🔘				e
Assessor	Staff, Access	~	Program			Grade	~	

- 16. Navigate to the General Domains tab and complete the CANS tool.
  - a. If this is not an initial assessment, the most recent CANS scores will show to provide you with additional information.

(6-24) Trauma/Transition Caregiver Resources  in  2 = Interferes with functioning; action needed nonitor 3 = Disabiling, dangerous; immediate or intensive action needed a
2 = Interferes with functioning; action needed
o bloability angeread, initialities action recease
0 1 2 3 Previous Rating

b. At the end of each section is a comment box for your clinical notes.

Legal	•	0	0	0			
Recreational	0	0	0	0			
Independent Living Skills	0	0	0	0			
Life Functioning Domain Description							
Please write a rationale for any item in the above domain or module							

17. Navigate to the Trauma/Transition and complete this section.

fective 01/18/2023	Author Staff, Access	~	00	Sign	0
nitial General Domains (6-24) Trauma/Transition Ca	regiver Resources				
otentially Traumatic/Adverse Childhood Experienc	es - Lifetime Exposure.				
NO = No evidence of any trauma of this type	YES = Exposure/e	xperienced a tra	uma of this type		
Item				No	Yes
Sexual Abuse				0	0
Physical Abuse				0	0
Neglect				0	0
Emotional Abuse				0	0
Medical Trauma				0	0
Natural or Manmade Disaster				0	0
Witness to Family Violence				0	0
Witness to Community/School Violence				0	0
Nar/Terrorism Affected				0	0
Witness/Victim of Criminal Acts				0	0
Parental Criminal Behavior				0	0
Disruption in Caregiving/Attachment Losses				0	0
Please write a rationale for any item in the above domain rated 'Ye	s'				

18. If available, navigate to the Caregiver Resources tab and complete this section.

lifornia CANS	ľ : (	6 🗹 😫 GoTo	<b>.</b> ., <b></b>	i 🖻 🖯	🖹 🖬 Save
9	thor Staff, Access	<b>~</b>	00	Sig	• 🛛 🛃 -
Caregiver Resources					
0 = No evidence; this could be a strength 1 = History or suspicion; monitor; may be an opportunity to build 2 = Interferes with functioning; action needed 3 = Disabling, dangerous; immediate or intensive action needed Caregiver Resources and Needs		Contac	sts		
Caregiver 1 Caregiver Name Last Name, First Name	Relationship				
Item	0	1	2	3	Previous Rating
Supervision	0	0	0	0	
Involvement with Care	0	0	0	0	
Knowledge	0	0	0	0	
Social Resources	0	0	0	0	
Residential Stability	0	0	0	0	
Medical/Physical	0	0	0	0	
Mental Health	0	0	0	0	
Substance Use	0	0	0	0	
Developmental	0	0	0	0	

a. You can add multiple caregivers by clicking on the "Add Caregiver" link at the bottom of the page.

	ramity Stress
	Please write a rationale for any item in the above domain or module
	a
A	dd Caregiver
L	<u>du caregiver</u>

19. Click Sign to complete and generate the document.



# Pediatric Symptom Checklist (PSC)

The Pediatric Symptom Checklist, or PSC or PSC-35, is required for youth mental health clients ages 0-18.

- 1. You must first have the client open, click the Search icon.
- 2. Type Pediatric Symptom Checklist into the search bar.

CalMHSA

3. Click to select California Pediatric Symptom Checklist (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

	CDAG Program Enrollment	
	Select Program Enrollment	
k tľ	OK Cancel	<u>0</u>
is		1

6. The PSC document will open. **Complete the document**. The PSC-35 is a form that is completed by the youth's caregiver. This may be done on paper and entered into this document for better tracking. You may also want to scan in the paper version the guardian completed. If so, see How do I scan a document into the client's record?

#### [screenshot]

7. Click Sign to complete and generate the document.



#### How do I view the PSC scores over time?

- 1. Have the client open. Click on the Search icon.
- 2. Type "Flow Sheet" in the search bar.
- 3. Select "Flow Sheet (Client)" from the search results.
|                    | Another, Test (1209) | Ê | <b>~</b> |
|--------------------|----------------------|---|----------|
| Q flow sheet       |                      | ] |          |
| S Flow Sheet (Clie | ent)                 |   | I        |

- 4. This takes you to the Flow Sheets page. Select the Pediatric Symptom Checklist Score from the dropdown menu.
- 5. Select your start and end dates that you'd like to see.
- 6. Click Apply Filter.
- 7. You can also view this information in graphical form by clicking on the Graphs tab.

w Sheet					₿ 🕹	<b>0</b> ? D >
Vital History Graphs	Today	5 Start Date	01/16/2023 🛅 🔻	End Date 01/16/2	2023 📺 🔻	Apply Filter
Add Flow Sheet Meaningful Use/Vitals Pediatric Symptom Checklist Score Pregnancy Outcome Prenatal Care	-4					6

## **Group Documentation**

Introduction to group documentation will go here...

## How to Add a New Client to a Group

To add a new client to a Group, follow the steps below:

- 1. Click the Search icon.
- 2. Type Managing into the search bar.
- 3. Click to select Managing Groups (My Office).

SmartCare	
CANS Reporting Record Summa	Q Managing 3 S Managing Groups (My Office)

4. Click to select the Process Group you will be adding the client to.

		.)	oups	naging Gr
Staff 🗸 🗸	roups 🗸 All St	Active		
Procedure	Location	ram		roup
Group Psychothe	Community Menta	tient MH A.	0	ocess Group
Group Psychothe	Community Menta	itient MH A.	4	cess Group

5. Locate the Client section towards the bottom of the Group Details screen. Click Add Clients.

Туре		$\sim$		Program	m	Outpatient	MH Adult	
Group Note	Group Progress Note		$\sim$	Procedu	ure Code	Group Psyc	hotherapy (Other T	Than of a Multiple-Fami
Classroom		$\sim$		Duratio	on	60.00	Minutes	
Max.# of Client(s)				Start Ti	ime	3:00 PM		
Medicare G Code								
Comment								
Attendance Group No			~					
Attendance Group No		am	~	Defa	ault Procedu		Client Specific De	∽ efault
Attendance Group No	ote Type			Defa Staff	ault Procedu		Client Specific D	
Attendance Group No Add a Clients Auto Clients which ma	te Type III clients enrolled in Progra omatically add clients from y attend this group.	roster to new grou		Staff	ault Procedu nat may lead	Set	Client Specific D	
Attendance Group No Add a Clients Auto Clients which ma Cuent Name	the Type III clients enrolled in Progra omatically add clients from y attend this group.	roster to new grou	p servic 5	Staff Staff th		Set	Client Specific D	efault
Attendance Group No Add a Clients Auto Clients which ma Clients which ma Asano, Jasor	nte Type	roster to new grou	p servic 5	Staff Staff th	nat may lead s Clinician	Set this group.		efault
Attendance Group Nc Group Nc Add a Clients Auto Clients which ma Cuent Name Asano, Jasor Bravo, Johnn	the Type <b>Control</b> Ill clients enrolled in Progra omatically add clients from y attend this group.	roster to new grou	p servic 5	Staff Staff th	nat may lead s Clinician	Set this group. Staff Name	rt	efault
Attendance Group Nc Add a Clients Auto Clients which ma uent Name X Asano, Jasor X Bravo, Johnr X Powers, Ligh	te Type Ill clients enrolled in Progra matically add clients from y attend this group.	roster to new grou	p servic 5	Staff Staff th Is X O	nat may lead s Clinician	this group. Staff Name Clinician, Robe	rt	efault
Group Ne Group Ne Clients Aute Clients which ma Clients which ma Cuent name X Asano, Jasor X Bravo, Johnr	the Type International Content of the Type International I	roster to new grou	p servic 5	Staff Staff th Is X O	nat may lead s Clinician	this group. Staff Name Clinician, Robe	rt	efault

- 6. The Client Search window will open, **click in the Last Name and First Name fields** to enter the corresponding information. **Select Enter** on your Keyboard to populate search results.
  - a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.
- 7. Click the radio button to left of the client you want to select.
- 8. Click Select and Close. This client will be added to the group.

Broad	Search Nar	row Search Type	e of Cl	ent 💽 Indi	vidual 🔵 Organ	ization 6		
Last Nam	ne Test		First	Name		Pro	gram	~
ner Searc	h Strategies							
SSN	Search				Phone # Sea	arch		
	Search a		1.		Master Client			
	Clinician Search			~	Client ID Se			
	ization ID / #				Insured ID S	_		
cords Fou								
	unu							
ID	Master ID	Client Name	Δ	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Primary Clinician
7)15	1015	Tesla, Jim		0000	01/01/1980	Active	Sacramento	
1091	1091	Test, Max		6345	01/01/1990	Active	Middle	Rapp, Chris
) 1080	1080	TestCH, Client		9999	01/20/2011	Active		

9. Click Save. Click the X to close the screen.

ſ	Group Details				? i ^₿ 🖬 Save 🗅 🖬 ×
	General Schedule				9
-	Type ~	Program	Outpatient MH Adult	-	•

## How to Add or Change a Staff Member in a Group

To add or change a staff member in a group, follow the steps below:

- 1. Click the Search icon.
- 2. Type Managing into the search bar.
- 3. Click to select Managing Groups (My Office).

SmartCare	
. <u>∎</u> ≔	Q Managing 3
CANS Reporting Record Summa	S Managing Groups (My Office)

4. Click to select the Process Group you will be adding the client to.

	Active Gro	ups 🗸 All Staf	f v Al	Programs	✓ All Locations	~	Attendance	Apply F	lter

5. Locate the Staff section towards the bottom of the Group Details screen. Click Add Staff.

Туре		$\sim$		Program	Outpatient	MH Adult
Group Note	Group Progress Note		$\sim$	Procedure Code	Group Psyc	hotherapy (Other Than of a Multiple-Famil
Classroom		$\sim$		Duration	60.00	Minutes
Max.# of Client(s)				Start Time	3:00 PM	
Medicare G Code						
Attendance						
Attendance	Schedule					
Attendance Group N			~			
Group N			~	Default Procedu	ure	$\checkmark$
Group N	ote Type	1	~	Default Procedi		✓ Client Specific Default
Group N	ote Type			Default Procede		
Group N Group N Group N Group Add Glients Aut	ote Type all clients enrolled in Program omatically add clients from ro y attend this group.		p service		Set	Client Specific Default
Group N Group N Add Clients Aut Clients which ma	ote Type all clients enrolled in Program omatically add clients from ro y attend this group.	ster to new grou	p service	Staff	Set	Client Specific Default
Group N Add Clients Aut Clients which ma Client Nam Asano, Jaso	ote Type all clients enrolled in Program omatically add clients from ro y attend this group.	ster to new grou	p service	Staff Staff that may lead	Set	Client Specific Default 5 Add Staff
Group N Group N Clients Add Clients which ma uent nam Asano, Jason Bravo, John	ote Type all clients enrolled in Program omatically add clients from roo y attend this group.	ster to new grou	p service	Staff Staff that may lead Is Clinician	Set this group. Staff Name	Client Specific Default 5 Add Staff
Group N Group N Clients Aut Clients which ma Client Nam X Asano, Jasoi Bravo, John Powers, Ligh	ote Type all clients enrolled in Program omatically add clients from ro y attend this group. e n n y	ster to new grou	p service	Staff Staff that may lead Is Clinician X	Set this group. Staff Name Clinician, Robe	Client Specific Default 5 Add Staff
Group N Group N Add Clients Aut Clients which ma Cuent Nam Asano, Jaso Bravo, John Powers, Ligh Thompson, T	ote Type all clients enrolled in Program omatically add clients from ro- y attend this group. e n y t foby	ster to new grou	p service	Staff Staff that may lead Is Clinician X	Set this group. Staff Name Clinician, Robe	Client Specific Default 5 Add Staff
Group N Add Clients Aut Clients which ma Cuent Nam Asano, Jaso Bravo, John Powers, Ligh	ote Type all clients enrolled in Program omatically add clients from ro- y attend this group. P n 14 15 15 15 15 15 15 15 15 15 15	ster to new grou	p service	Staff Staff that may lead Is Clinician X	Set this group. Staff Name Clinician, Robe	Client Specific Default 5 Add Staff

- 6. Click to select the correct staff member to add.
- 7. Click OK.

Group Ser	vice Staff Pop Up	RADING CONTRACTOR	<b>?</b> ×
-		ок	Cancel
	Staff, Access		
	Staff, Billing		
	Staff, Clerical		
	Staff, Compliance		
	Staff, Nurse 6		
	Staff, Psychiatrist		
	Stephan, Khristy		
	Sullivan, Kevin		

8. And/or, if you need to remove a staff member, **click the X** to the left of the staff member you want to remove.

Staff that	may lead	this group.	Add Staff
8 s C	linician	Staff Name	
×o		Clinician, Robert	
XO		Supervisor, Clinician	
XO		Staff, Psychiatrist	

9. Click Save. Click the X to close the screen.

(	Group Details				? i ^₿ 🖻 Save 🗅 面 ×
	General Schedule				9
	Туре	~	Program	Outpatient MH Adult 🗸 🗸	

#### How do I write a group progress note?

6. On your Appointments for Today widget, click on the link for the time of the group you're documenting.

#### <mark>screenshot</mark>

7. This opens the Group Services Detail screen. In the upper left, you'll see the group information. Confirm the information and **add any additional information regarding the entire group**.

roup Service Detail			{	10 ( <b>b</b> )	A' 🗩 i		ave
Service Note		2					
Group		Staff				Add Staff	Î
Group Process Group Date 01/19/2023	-	Staff Name Clinician, Ro Supervisor, C	<b>Unit</b> 60 60	<b>Type</b> Minutes Minutes	Start 2:00 PM 2:00 PM		
Clients Show Clients		Service Information	Custom Fields	Billing Diagno	sis 🚩	Warnings and Errors	-
X 🏲 Asano, Jason X 🏴 Bravo, Johnny				0 0	8		1
X M Childers, Cindy	<u><u> </u></u>	Procedure Gr	oup Psychotherapy (Othe	r Than of a t 🗸	Set All	Set Some	
<ul> <li>Cliniders, clindy</li> </ul>		Start 2:0	Total Total				
🗙 🧯 Powers Light	bu ; (f) (0)		0 PM Duration 60	.00 Minutes	Set All	Set Some	
<ul> <li>Powers, Light</li> <li>Test Patient</li> </ul>	i 🗘 💝	Status Sh	Duration 60	.00 Minutes		Set Some	l
🗙 🧮 Test, Patient	🌣 💷 🗘 i 🍽	Status Sh Cancel Reason	Duration 60		Set All		l
X 🏴 Test, Patient X 🗮 Tommy, Max	♥ 1500 0 i ⊨ ♥ 1500 @ 0 i	Cancel Reason Program Ou	0 PM Duration 60 ow tpatient MH Adult	* *	Set All Set All Set All	Set Some Set Some Set Some	l
Test, Patient       Tommy, Max       Heite, Walter	♥ 1000     0     i       ♥ 1000     ①     0     i       100     ↓     ↓     ●	Cancel Reason Program Ou Clinician Cli	O PM Duration 60.	* * *	Set All Set All Set All Set All	Set Some Set Some Set Some Set Some	
X 🏴 Test, Patient X 🏴 Tommy, Max	♥ 1500 0 i ⊨ ♥ 1500 @ 0 i	Cancel Reason Ou Program Ou Clinician Cli Attending	0 PM Duration 60 ow tpatient MH Adult	* * *	Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some	
Test, Patient       Tommy, Max       Heite, Walter	♥ 1000     0     i       ♥ 1000     ①     0     i       100     ↓     ↓     ●	Cancel Reason Program Ou Clinician Cli Attending Mode Of Delivery	0 PM Duration 60 ow tpatient MH Adult	* * *	Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some	
X 👎 Test, Patient X 👎 Tommy, Max X 👎 White, Walter	♥ 1000     0     i       ♥ 1000     ①     0     i       100     ↓     ↓     ●	Cancel Reason Program Ou Clinician Cli Attending Mode Of Delivery Billable C	ov Duration Duration 60 ow tpatient MH Adult nician, Robert	* * *	Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some	
X 👎 Test, Patient X 👎 Tommy, Max X 👎 White, Walter	♥ 1000     0     i       ♥ 1000     ①     0     i       100     ↓     ↓     ●	Cancel Reason Program Ou Clinician Cli Attending Mode Of Delivery	ov Duration Duration 60 ow tpatient MH Adult nician, Robert	* * * *	Set All Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some	
X 👎 Test, Patient X 👎 Tommy, Max X 👎 White, Walter	♥ 1000     0     i       ♥ 1000     ①     0     i       100     ↓     I     ●	Cancel Reason Program Ou Clinician Cli Attending Mode Of Delivery Billable Transportation Servi Interpreter Services	ov Duration Duration 60 ow tpatient MH Adult nician, Robert	* * * *	Set All Set All Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some Set Some	
X 👎 Test, Patient X 👎 Tommy, Max X 👎 White, Walter	♥ 1000     0     i       ♥ 1000     ①     0     i       100     ↓     I     ●	Cancel Reason Program Ou Clinician Cli Attending Mode Of Delivery Billable <b>V</b> Transportation Servi Interpreter Services Needed	tpatient MH Adult inician, Robert	* * * * * * * *	Set All Set All Set All Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some Set Some	

- 8. In the upper right, you'll see the staff members that are set as facilitators for this group.
  - a. **Make edits to which staff members were present**. For example, if a staff was only present for half of the group time, indicate this by editing the Unit (how many minutes they were present) and the Start Time to match what actually happened.
  - b. If a staff member was not present, click the Delete icon next to their name to remove them from this service.
  - c. If an additional staff member was present who is not listed, click the Add Staff button.

Sup 3	Service Detail						-5 O 🌢	A' 오	i 🤒 🛅	Save
Service	Note		3							С
Group			St	aff					1	Add Staff
Group Date Location Status Evidence	Process Group 01/19/2023     Community Mental Health ( Show Based Practices	Group Comment Specific Location	×	Staff Name Clinician, Ro Supervisor, C D		a Unit 60 60	Type Minutes Minutes	Start 2:00 P 2:00 P		
Clients × 🍽	Show Clients With Er	rors 🔎 🕂	Servi	ce Information	Custo	m Fields	Billing Diag	nosis 🚩	Warnings a	and Errors
× 🗧	Bravo, Johnny	© ⊨i ⊨i	Pro	cedure Gr	oup Psych	otherapy (O		<ul> <li>Set All</li> </ul>	0.10	
		alla .			oup i oyon	ornerapy (o	ther Than of a r	Set All	Set Some	
→ × → ×	Childers, Cindy		Sta	rt 2:0	IN PM	Total		es Set All	Set Some	- 1
× 🤻	Powers, Light	₩ i 0 ♥	Sta		IN PM	Total	60.00 Minut			_
⇒ × ⇒ ×	Powers, Light Test, Patient		Sta	tus Sh ncel Reason	00 PM	Total Duration	60.00 Minut	es Set All <ul> <li>Set All</li> <li>Set All</li> <li>Set All</li> </ul>	Set Some Set Some Set Some	
<ul> <li>→ ×</li> <li>→ ×</li> <li>→ ×</li> <li>→ ×</li> </ul>	Powers, Light Test, Patient Tommy, Max	₩ i 0 ♥	Sta Car Pro	tus Sh ncel Reason gram Ou	IO PM	Total Duration H Adult	60.00 Minut	es Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some	
* * * * * * * *	Powers, Light Test, Patient Tommy, Max White, Walter	i 0 ♥ ™ i 0 ♥ ™ ™ 0 i ⊨ ♥ ™ 0 i ⊨ ♥ ™ 0 i	Sta Car Pro Clir	tus Sh ncel Reason Igram Ou nician Cl	00 PM	Total Duration H Adult	60.00 Minut	<ul> <li>Set All</li> <li>Set All</li> <li>Set All</li> <li>Set All</li> <li>Set All</li> <li>Set All</li> </ul>	Set Some Set Some Set Some Set Some Set Some	
→ × → × → ×	Powers, Light Test, Patient Tommy, Max	v i 0 v ∞ ∞ 0 i v ∞ ∞ ∞ i 0 i	Sta Car Pro Clir Atte	tus Sh ncel Reason gram Ou nician Cl ending	IO PM	Total Duration H Adult	60.00 Minut	Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some	
* * * * * * * *	Powers, Light Test, Patient Tommy, Max White, Walter	i 0 ♥ ™ i 0 ♥ ™ ™ 0 i ⊨ ♥ ™ 0 i ⊨ ♥ ™ 0 i	Sta Car Pro Clir Atte Mor	tus Sh ncel Reason gram Ou nician Cl ending de Of Delivery	IO PM	Total Duration H Adult	60.00 Minut	Set All Set All Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some	
* * * * * * * * * *	Powers, Light Test, Patient Tommy, Max White, Walter	i 0 ♥ ™ i 0 ♥ ™ ™ 0 i ⊨ ♥ ™ 0 i ⊨ ♥ ™ 0 i	Sta Car Pro Clir Atta Moi Bill	tus Sh ncel Reason gram Ou nician Cl ending	00 PM	Total Duration H Adult	60.00 Minut	Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some	
* * * * * * * *	Powers, Light Test, Patient Tommy, Max White, Walter	i 0 ♥ ™ i 0 ♥ ™ ™ 0 i ⊨ ♥ ™ 0 i ⊨ ♥ ™ 0 i	Sta Car Pro Clir Attu Mou Bill Tra Intu	tus Sh ncel Reason gram Ou nician Cl ending de Of Delivery able V	00 PM low utpatient M inician, Rol	Total Duration H Adult bert	60.00 Minut	Set All Set All Set All Set All Set All Set All Set All Set All Set All	Set Some Set Some Set Some Set Some Set Some Set Some Set Some	
* * * * * * * *	Powers, Light Test, Patient Tommy, Max White, Walter	i 0 ♥ ™ i 0 ♥ ™ ™ 0 i ⊨ ♥ ™ 0 i ⊨ ♥ ™ 0 i	Sta Car Pro Clir Moi Bill Tra Inte Nee	tus Sh ncel Reason gram Ou nician Cli ending de Of Delivery able Services	00 PM low utpatient M inician, Rol	Total Duration H Adult bert	60.00 Minut	<ul> <li>Set All</li> </ul>	Set Some Set Some Set Some Set Some Set Some Set Some Set Some Set Some	
* * * * * * * *	Powers, Light Test, Patient Tommy, Max White, Walter	i 0 ♥ ™ i 0 ♥ ™ ™ 0 i ⊨ ♥ ™ 0 i ⊨ ♥ ™ 0 i	Sta Car Pro Clir Moi Bill Tra Int Nee Trav	tus Sh ncel Reason Qr gram Qr ending Cl ending de Of Delivery able C able C erpreter Services eded	00 PM low utpatient M inician, Rol	Total Duration H Adult Dert	60.00 Minut	<ul> <li>Set All</li> </ul>	Set Some Set Some Set Some Set Some Set Some Set Some Set Some Set Some	

d. This brings up the Group Service Staff Pop Up. Select the staff member(s) you want to add and click OK.

	rvice Staff Pop Up		
		ОК	Cancel
	Staff, Access	d	
	Staff, Billing	-	
	Staff, Clerical		
	Staff, Compliance		
/	Staff, Nurse		
	Staff, Psychiatrist		
	Staff, Test		
	Stephan, Khristy		
	Sullivan, Kevin		
	Tes, Niru		
	Test, Abhi		
	Test, Aishu		
	Test, CDK		
	Test Jack		

- 9. On the middle left side of the screen, you'll see the list of clients enrolled in this group. Make edits to this list to confirm the group roster.
  - a. To remove a client from the roster, click the Delete Service icon. DO NOT do this if they are simply a noshow. Only do this to remove them from this service's roster entirely.
  - b. To add a client who has already been enrolled in this group, click the Plus icon.

	b	service Informatio	n Cus	stom Fields	Billing Diagno	sis   P	Warnings and Error
🗙 🦰 Asano, Jason	🗎 💎 ASAN 🔽 i					0	
K 🥐 Bravo, Johnny	♥ 🖬 i 🛤 i	Procedure	Group Psy	chotherapy (Oth	er Than of a l 🗸	Set All	Set Some
Childers, Cindy Powers, Light		Start	2:00 PM	Total Duration 60	0.00 Minutes	Set All	Set Some
		Status	Show		~	Set All	Set Some
🍋 Test, Patient		Cancel Reason			~	Set All	Set Some
Tommy, Max		Program	Outpatien	it MH Adult	~	Set All	Set Some
White, Walter	🛍 V i 🎽 🗘	Clinician	Clinician,	Robert	~	Set All	Set Some
Williams, Kyle	V	Attending			~	Set All	Set Some
		Mode Of Delivery			~	Set All	Set Some
		Billable	~			Set All	Set Some
		Transportation Se	rvice	No	~	Set All	Set Some
		Interpreter Servic Needed	es			Set All	Set Some
		Travel Time		Minute	5	Set All	Set Some
		Face to Face Time		Minute	3	Set All	Set Some
		Documentation Ti		Minute		C-4 All	Set Some

c. This will open up the Group Service Client Popup, which will list any additional clients that are enrolled in this group. **Select the client and then click Select** to add them to this service.

Group Service Client Popup	? ×
Group Service Clients	A
Clients in Process Group	
Name	u.
No data to display	
	11
	Ŧ
	Cancel 🗸

d. To add a client who is enrolled in this program but not yet enrolled in this group, click the List icon.

Clients	Show Clients	With Errors 🔎 🕂 🔳
		d
🧡 🌂	Asano, Jason	🗎 💝 ASAM 🗘 i
	Bravo, Johnny	🌣 🍽 i 🍽 i
🤧 🌂	Childers, Cindy	Ê
🧡 🌂	Powers, Light	🏲 i 🗘 💝
🤧 🗡	Test, Patient	🛠 asam 🗘 i 🍽
🤧 🗮	Tommy, Max	🛠 asam 🏛 🗘 i
<b>≯</b> ₹	White, Walter	🛍 V: i 🍽 🗘
	Williams, Kyle	V

e. This will open up the Group Service Client Popup, which will list any clients that are enrolled in this program but are not yet enrolled in this group. **Select the client(s) you want to add and click Select** to add them to this service.

Group Service Client Popup	? ×
Group Service Clients	^
Clients that are enrolled in the program	- 1
Name	- 1
Adair, Alice (1160)	•
Another, Test (1209)	
Arambula, Maximo (1247)	
Asano, Hiro (1111)	
Asano, Kaito (1106)	
Baizey, Test (1183)	
Baizey2, Test1 (1204)	
Banks, Tara (1078)	
Barajas, Fabiola (1235)	
Barnes, Kim (1093)	
Barrington, Rosemary (1265)	T Cancel T

f. To add a client from another program, click on the Magnifying Glass icon.



g. This will bring up the client search function. Search for the client you want to add and click Select & Close. If you want to add more than 1 client, you can simply click Select and then search for the next client you want to add.

	Last Name	e Tra	ining	/pe of Client OInc		-	rogram		~	•
				That Name			rogram			
th	er Search	h Strategi	es							
	SSN S	earch			Phone	# Search				
	DOB S	earch		<b>≡ -</b>	Master (	lient ID Sear	ch			
	Primary C	Clinician Sea	ırch	~	Client 1	D Search				
	Authori	zation ID / #	<b>#</b>		Insured	ID Search				
-	ords Fou	nd								
	0140104	i i ci								_
	<u>ID</u>	<u>Master ID</u>	<u>Client Name</u> △	Chosen Name	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Primary Clinicia	<u>an</u>
D	1138	1138	Train, Test		3693	12/01/19	Active	New York	Tg, Sahana	
D	1239	1239	Training, Manual		9999	06/07/20	Active			
D	1268	1268	Training, Manuel		3545	09/01/20	Active			

- 10. Once you have your group roster set up, move to the service information section. The first client will be highlighted. As you make changes, this will update this particular client. This is where you mark whether clients who were a no-show for the group, or who canceled.
  - a. If you want to set this information for all of the clients, click the "Set All" button. You can do this for each item in the service information section.
  - b. If you want to set this information for more than one client, but not all of them, click the "Set Some" button.

Clients 🗌 Show Clients With Errors 🔎 🕂	
🗙 🏲 Asano, Jason 👘 🐨 💷 🕥 👔 💆	Service Information Custom Fields Billing Diagnosis 🚩 Warnings and Errors
X 🏴 Bravo, Johnny 😵 🍽 i 🍽 i	Procedure Group Psychotherapy (Other Than of a t v Set All Set Some
X     ♥     Powers, Light     ▶     i     0     0       X     ♥     Test, Patient     ♥     MARK     0     i     ▶	Start 2:00 PM Duration 60.00 Minutes Set All Set Some
X ← Tommy, Max     Image: Constraint of the second s	Cancel Reason Program Outpatient MH Adult Clinician Clin
X 🎽 Williams, Kyle	Clinician     Clinician, Robert     Set All     Set Some       Attending     Set All     Set Some       Mode Of Delivery     Set All     Set Some
	Billable     Set All     Set Some       Transportation Service     No     Set All     Set Some
	Interpreter Services Set All Set Some
	Travel Time     Minutes     Set All     Set Some       Face to Face Time     Minutes     Set All     Set Some
	Documentation Time Minutes Set All Set Some

c. This will bring up the Set Some pop-up window. **Select the clients you want to include in this change** (e.g. all the clients who you want to mark as "show"). Then **click Set**.

Set Some		С	
Status New Val	ue = Show	Set	Cancel
	Client Name	Current Value	
	Asano, Jason	Show (71)	
	Bravo, Johnny	Show (71)	
<b>v</b>	Childers, Cindy	Show (71)	
✓	Powers, Light	Show (71)	
<b>~</b>	Test, Patient	Show (71)	
	Tommy, Max	Show (71)	
✓	White, Walter	Show (71)	
<b>~</b>	Williams, Kyle	Show (71)	

- 11. Once you've completed the service information, **navigate to the Note tab**.
- 12. Enter the group note summary. This will be pushed to all of the group member's notes.

Group Service Detail	-50 🖻 A' 🗭 i A	🕽 🛅 🗋 Save 🗙
Service Note Group Note Client Note	Sign My Notes Co-Signer(s) V Add	Co-Signer
Template Clinician, Robert 🗸 Update My Client Notes		
Total Number in Group		
List non-client group members		
Group Summary		7

#### 13. Navigate to the Client Note tab.

- 14. On the left side of the screen, **select the client** you're writing the note for.
  - a. You can **click on the checkbox "Only Show clients where I am the Note Author"** to limit the clients on the list.
- 15. On the right side of the screen, enter the individual client's note for this group service.

Group Service Detail	-5 0 🛍 A' 🗭 i Ab 🛅 🗅 🖬 Save 🗙
Service Note Group Note Client Note Only Show clients where I am the	a Sign My Notes Co-Signer(s) V Add Co-Signer
Asano, Jason Johnny rs, Cindy Powers, Light Test, Patient	Note       Treatment Plan Goals Addressed       Co-Signers         General       Perinatal depression       Primary degenerative dementia of the Alzheimer type, presenile onset, with depression (disorder)         Severe food insecurity on U.S. household food security survey module       ************************************
Tommy, Max 🕈 White, Walter 🕈 Williams, Kyle	Severe food insecurity on U.S. household food security survey module Severe food insecurity on United States household food security survey module Unhealthy alcohol drinking behavior Information
	Information Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).

16. Add problems to the problem list as necessary. See Problem List for more information. After adding any problems, make sure to click Save.

Group Service Detail					-5		A' Ø	i '	₽ 💼	
Asano Jason 🏴	Clients	Only show notes with Validation E	rrors	Co-Signer(s)	✓ Add Co-S	igner				
Bravo, Johnny	e Treatme	nt Plan Goals Addressed Co-S	igners							
Childers, Cindy 🦰 Gen	eral									11
Powers, Light Pro	blem Detai	ls								
Test, Patient									_	
Tommy, Max 🥊 🕇									~	
White, Walter Coc	de Search	Description Search							Q	· 🖈
Sta	art Date: 01/2	1/2023 🔲 🍷 End Da	ite:	Program Ou	patient MH Adult	-11/10/ 🗸				
	oblem List				patient MH Adult	-11/10/ 🗸		Inser	t	Clear
Pr	oblem List		SNOMED CT Code	Program Ou	patient MH Adult Start Date	-11/10/ V End Date	Pro	Inser	t	Clear
Pr		SNOMED Description								Clear
Pr	roblem List	SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date		Acc	ogram	t	Clear
Pr ×	oblem List	SNOMED Description Subchronic schizophrenia with	SNOMED CT Code 111482003 10211000132109	ICD 10 Code F20.3	Start Date 11/18/2022		Acc Acc	ogram ess Uni ess Uni	t	
Pr × ×	oblem List	SNOMED Description Subchronic schizophrenia with Perinatal depression	SNOMED CT Code 111482003 10211000132109 10532003	ICD 10 Code F20.3 F32.9 F32.9	Start Date 11/18/2022 11/18/2022		Acc Acc Out	ogram ess Uni ess Uni	t t MH Adult	
Pr × ×	oblem List 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	SNOMED Description Subchronic schizophrenia with Perinatal depression Primary degenerative dementia	<b>SNOMED CT Code</b> 111482003 10211000132109 10532003 470951000124105	ICD 10 Code F20.3 F32.9 F32.9 Z59.41	Start Date 11/18/2022 11/18/2022 11/18/2022		Acc Acc Out Acc	ogram ess Uni ess Uni patient	t t MH Adult	
Pr × × ×	oblem List Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Generation Genera	SNOMED Description Subchronic schizophrenia with Perinatal depression Primary degenerative dementia Severe food insecurity on U.S. h	SNOMED CT Code 111482003 10211000132109 10532003 470951000124105 470951000124105	ICD 10 Code F20.3 F32.9 F32.9 Z59.41 Z59.41	Start Date 11/18/2022 11/18/2022 11/18/2022 11/18/2022		Acc Acc Out Acc Acc	ogram ess Uni ess Uni patient ess Uni	t t MH Aduli t	

17. Select problems that were addressed in today's session. If you've added any problems to the problem list during this note writing, click Refresh to update this list.

roup Service Detail		-3	🛛 🏥 A' 🗭 i Ab 🛅 🗋 🖬 Save
Service         Note           Group Note         Client Note           Only Show clients where I am th		in My Notes Co-Signer(s) 🗸 Add Co-S	igner
Asano, Jason 🦰 Bravo, Johnny 🏲	Note Treatment Plan Goals Addressed Co-Signers	_	
Childers, Cindy 🦰	General Severe food insecurity on Unite 47095	51000124105 259.41 11/18/2022	Access Unit
Powers, Light 🦰 Test, Patient 🦰	X 🔿 🛛 Unhealthy alcohol drinking beh 10939	988100011 F10.10 12/21/2022	Access Unit
Tommy, Max 🦰			
White, Walter 🗧 🧮			
Williams, Kyle 🦰	Problems addressed during this session		Refresh
	Subchronic schizophrenia with acute exacerbations (disc	order) resenile onset, with depression (disorder)	

- 18. To add Co-Signers as necessary, **navigate to the Co-Signers tab**.
  - a. Select the staff from the dropdown menu. This will add them to the list of people who will be asked to cosign the note.
- 19. Once you're finished with all of your notes, click "Sign My Notes."

Group Service Detail	-5 🛈 🏥 A' 오 i 🐣 🛅 🗋 🖬 Save 🗙
Service     Note       Group Note     Client Note       Only Show clients where I am the Note Author     Only show notes with Validation Errors       Asano, Jason     Hide Clients       Bravo, Johnny     Max       Childers, Cindy     Co-Signer       Powers, Light     Co-Signer       Test, Patient     Clinician, Robert       White, Walter     Clinician, SUD       Wittiams, Kyle     Clinician, SUD	Add Co-Signer

## **Referrals and Transfers**

## **Diagnosis Entry**

In this section, you will learn how to add a diagnosis, update a diagnosis, deleted a diagnosis, and how to favorite a diagnosis.

## How to Add a Diagnosis

To add a diagnosis, follow the steps below:

- 1. You must first have the client open, click the Search icon.
- 2. Type Diagnosis into the search bar.
- 3. Click to select Diagnosis Document (Client).



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG Program Enrollment	<b>9</b> ×	
Select Program Enrollment	4	
Outpatient MH Adult-11/01/2022-11/16/2022	~	Da
OK Cancel		

- 6. The Diagnosis Document screen will open, click in the code field and enter the diagnosis code.
- 7. A list of matching diagnoses will populate, **click to select** the appropriate diagnosis



- a) Alternatively, you can **click in the Description filed** and **enter the diagnosis description**.
- b) A list of matching diagnoses will populate, **click to select** the appropriate diagnosis

Diagr	nosis		
*		a	~
Code	F06.31 🚺	Description	depr 🔍 🔍 😭
	Rule Out	Туре	F06.31* - Depressive disorder due to another medical condition, With depressive features - 37739004 - Mood disorder due to a general medical condition (disorder)
		Severity	F06.31* - Depressive disorder due to another medical condition, With depressive features - 42594001 - Organic
			mood disorder of depressed type (disorder)
		Remission	F06.31* - Depressive disorder due to another medical condition, With depressive features - 75837004 - Mood
		Comments	disorder with depressive features due to general medical condition (disorder)

8. You must document if the diagnosis is Primary, Additional, or Provisional. **Click the drop-down menu in the Type field** and **select** the appropriate option.

Diagnosis						
*					$\checkmark$	
Code F06.31	<ol> <li>Description</li> </ol>	Depressive disorder due to another medical condit	8 With depressive fea	atures	Q	☆
🗌 Rule Ou	ut Type	<u> </u>	Specifier			
	Severity	Primary	Source			
	Remission	Additional Provisional	Order	1 Billa	able 💽 Yes	○No
	Comments					

9. If a severity level is appropriate, **click the drop-down menu in the Severity field** and **select** the appropriate option, mild, moderate, or severe.

Diagnosis					
*				$\checkmark$	
Code F06.31 () Descrip	otion Depressive disorder due	to another medical condition, V	Vith depressive features	Q	\$
Rule Out Type	Primary	<b>~</b> 9	Specifier		
Severit	у	~	Source		
Remiss	sion Mild		Order 1	Billable 💽 Yes	○No
Comme	ents Moderate Severe				

10. To document that the client is in remission, **click the drop-down menu in the Remission field** and **select** the appropriate option.

Diagnosis								
*							$\sim$	
Code F06.31 (	Description	Depressive disorder due to another medical co	ondition	, With depressive fea	tures		Q	✿
Rule Out	Туре	Primary	$\sim$	Specifier				
	Severity	Moderate	~ 10	Source				
	Remission		$\sim$	Order	1	Billable	• Yes	○No
	Comments	Early Remission Sustained Remission Remission in a controlled environment						

a. If this diagnosis is informational only and not a billable diagnosis, click the No radio button in the Billable field.

1		Billable	◯ Yes	🖸 No
	L	L	L Billable	L Billable OYes

11. Click the Insert button to add the diagnosis. It will appear in the Diagnosis List grid below

	Remis	ssion			~	Order	2	В	illable 💽	Yes 🔿 No
	Comn	ments								
								_		11
Diagnosis List									Insert	Clear
	Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Descriptior	SNOMED Description	Туре	Severity	Source	Comments
$\mathbf{X} \cap 0$	1	F06.31	37739004		Depressive disorde	Mood disorder due	Primary	Moderate		

- a) Repeat steps 1-12 for remaining diagnoses.
- 12. Click Sign to complete and generate the document.

Diagnosis Document				≡ 🗳 : 🎝 🖄	Goto 🛓 🖬 Save 🗋 🖶 🛅 🗙
Effective 11/16/2022	Status New	Author Clinician, Robert	~	00	Sign 🞯 < 🕂
Diagnosis					
No Diagnosis					

Note: If you need to review the programs the patient is enrolled in, click the More Detail icon at the top of the window.

iagnosis Document					≡	:	E <b>° :</b> .	<b>1</b> 0 🗹	\rm Gotto 💄	Save	080
Effective 11/16/2022	Status	New	Aut	hor Clinician, Robert 🗸		G	00			Sign	<b>@</b> <+
Diagnosis											
Effective 11/16/2022	📺 🗸 Status	New	Auth	nor Clinician, Robert 🗸		G	0			Sign	0<-
Other Versions		Signed By	5	Signer					Progra	m	
		A	Ad	d Signer(s)	~			-	Outpatien	t MH Adult-11/0	01/2022-11 V
		-		Co-Sign Decline				-			

#### How to Delete a Diagnosis

To delete a diagnosis, follow the steps below:

1. Click the X icon to left of the diagnosis you want to delete.

- agine	osis Lis	t								Insert	Clear
		Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Description	SNOMED Description	Туре	Severity	Source	Comments
× 1	0	1	F06.31	37739004		Depressive disorde	Mood disorder due	Primary	Moderate		
×O	0	2	F31.9	133091		Bipolar I disorder,	Rapid cycling bipol	Additional	Moderate		
X O	0	3	F41.1	21897009		Generalized anxiet	Generalized anxiet	Additional	Moderate		

2. A prompt will appear and confirm you want to delete, **click OK**.



#### How to Modify and/or Re-Order a Diagnosis

To modify or re-order a diagnosis, follow the steps below:

- 1. Click the radio button to the left of the diagnosis you need to update.
- 2. Make updates to the appropriate fields above.
  - a. If you need to re-order your diagnosis, **click in the Order field** and enter the number you would like the diagnosis to appear in.
- 3. Click Modify to save your changes.

											$\sim$	
ode F06.31	🖯 Descriptio	n Depressi	ve disorde	er due to	another medical condi	2 With depre	ssive fea	atures			Q	\$
🗌 Rule Out	Туре	Addition	al		~	s	pecifier					
	Severity	Moderat	e		~	]	Source		а			
	Remission				~	]	Order	1	E	illable	🗿 Yes	ON
	Comment	6										
	Comment	3									3	
liagnosis List	Comment	ŝ								Modif		Clear
liagnosis List	Order DS	:M 5/	NOMED	R/O	ICD/ DSM Description	SNOMED Des	cription	Туре	Severity	Modif	У	
	Order IC	M 5/ D 10 St	NOMED 739004	R/O	ICD/ DSM Description Depressive disorde				Severity Moderate		У	<b>Clear</b>
	Order IC	iM 5/ D 10 st 5.31 37		R/O			due				У	

#### How to Modify a Diagnosis After the Document is Generated

To modify a diagnosis after the Diagnosis Document has been generated, follow the steps below:

1. Navigate to the Diagnosis Document, **click the Edit icon** at the top of the screen.

iagnosis Document		🚍 📑 🚼 🏖 🖄 🚱 GOT	📲 i 🖻 Save 🗅 🖶 🛅
Effective 11/16/2022	Author Clinician, Robert	11/16/2022	Sign 📝 🔀
Document			
≔ 1 of 2 Q	- + Q	$\square   \square   A_{\prime}   \square   A_{\prime} ~ A_{\prime} ~$	
Client ID: 1091		Page 1 of 2	
	CalMHSASmartcareTrain   09	-21-2022	
	Diagnosis Document	:	

2. A confirmation window will open, asking if you want to proceed with making changes to the document. Click OK.

Confirmation Message	]
A new version of this document is about to be created. Do you wish to continue?	-

3. Make the necessary changes and click the Sign button when you are finished to regenerate the document.

#### How to Save a Favorite Diagnosis

To add a diagnosis as a favorite, follow the steps below:

1. Click the Add Favorite icon, to right of the diagnosis.

Diagr	nosis						
*							× _1
Code	F06.31	Description	Depressive disorder due to	another medical condi	tion, With depressive fea	tures	۹ 😭
	Rule Out	Туре	Additional	~	Specifier		
		Sovarity	Moderate	$\checkmark$	Source		

2. To use the favorite diagnosis in the future, click the drop-down menu next to the favorite icon and select it.

Diagr	iosis	2	
*	<b>∨</b>	]	
Code	F06.31 (Mood disorder due to known physiological condition with depressive features) F06.31 (Depressive disorder due to another medical condition, With depressive features)	Q	兌
	F25.0 (Schizoaffective disorder, Bipolar type) F90.1 (Attention-deficit/hyperactivity disorder, Predominantly hyperactive/impulsive presentation)		
	Severity Moderate Severity disorter, redominantly hyperactive/impulsive presentation/		

## **My Calendar Management**

In this section you will learn how to create a client appointment, reschedule an appointment, and create non-client facing time on your schedule for paperwork, training, etc.

## How to Create an Appointment from Your Calendar

To create an appointment from your schedule, follow the steps below,

1. From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book.

C 8:00 AM - 10:30 AM	8:00 AM - 8:15 AM	
Intake Hours		
8:30 AM - 9:30 AM		
New event		
	10:00 AM - 11:00 AM Group Service: Process Group (#78)	
C 10:30 AM - 12:00 PM	Group Service: Process Group (#78)	and the second secon
Client Assessment Time		

- 2. In the New Entry Type pop-up, select the New Service Entry radio button.
- 3. Click OK.

Smart Care	×
New Entry Type	
New Calendar Entry	
New Service Entry	
O New Primary Care Entry	
O New Resource Entry	
	3
	OK Cancel

- 4. In the Service Notes screen, **click the drop-down menu** in the program field and **select the appropriate program**
- 5. Click the drop-down menu in the Procedure field and select the appropriate procedure.
- 6. Click the drop-down menu in the Location field and select the appropriate location.
- 7. Click in the Total Duration field and enter the duration of the appointment.

rogress Note	(MH)						Ē	: 2
Effective 11/21/20	22 Status New		Author Clin	ician, Robert				
Service Note	Billing Diagnosis Warnings							
Service								
Status	Scheduled	×	Start Date	11/21/202	22 🛗 🔻			
Program	Outpatient MH Adult	~4	Start Time	08:30 AM				
Procedure	Therapeutic Behavioral Services	<b>√</b> 5	Travel Time		Minutes			
Location	Community Mental Health Center	~ 6	Face to Face Time		Minutes			
Clinician	Clinician, Robert		Documentation Time		Minutes 7			
			Total Duration	60	Minutes			
Cancel Reason		$\sim$	Attending		````	~		
			Referring		`	~		

8. Click the Save icon. Click the X icon to close the screen.

Q 🗙 Inst, Max (1091) 🍽 i 🗘 🔤 🛱	<u>i + x</u>	-0 	♠ 🔊 ? Access Staff - 🔱
Progress Note (MH)		🗳 : 🎝 🖄 😫 😔 Gotto 🚨 😭 1	🛧 💵 ? 🖃 Save 🗋 🖶 🖮 🗙
Effective 11/21/2022 Status New	Author Clinician, Robert	00	ToSign 🐼 < 🕂
Service Note Billing Diagnosis Warnings			0
Service			
Status Scheduled	✓ Start Date 11/21/2022		

## How to Reschedule a Client's Appointment

To reschedule a client's appointment from your calendar, follow the steps below:

1. From your SmartCare home page, locate the Appointments for Today widget. **Click the appointment time** to the right of the patient you need to reschedule.

Workgroup							* 3	As	signed Docum	nent(s)			6
	All Workgroup	is v	O Assi	igned	Clinician, Robe	rt v				Notes	ISP	Assessment	Other
Tracking Protocol	All Flags		⊖тхт	ſeam Role	All Assigned Ro	les 🗸			Due Now	Q	0	0	Q
Flags Track	ed	Due in	90-61 D	ays	Due in 60-31 Days	Due in 30 Days or L	ss Overdue		n Progress	<u>v</u>	0	<u>0</u>	8
Assessment Needed			0		Q	1	8		Due in 14	<u>v</u>	Q	<u>0</u>	Q
<u>CalOMS</u>			<u>0</u>		<u>0</u>	<u>0</u>	2		Co-Sign	0	0	0	3
CANS due for this client			<u>0</u>		Q	<u>0</u>	1		o-Sign	<u>_</u>	0	<u>_</u>	0
CSI admission			<u>0</u>		Q	Q	5		Assigned		0		0
Staff Safety Concern			<u>0</u>		Q	Q	1	-		-	-	-	-
UMDAP Due			<u>0</u>		Q	Q	1						
Update Problem List			Q		Q	1	5						
WRAP			0		0	0	1						
ppointments For Tod				C	New Alert/Messa	-							Ŕ
Client Name/Description	n Time	Status			From	Received		ubject		Mess			
	08:00 AM	Cancel			Rowe, Charla	11/17/2022			ote: Appointment.			Client called and	
TestCH, Client(Ass		Show			Staff, Access	08/24/2022	0	lease Cor				t outreach to clie	
<u>TestCH, Client(Ass</u> Process Group	<u>10:00 AM</u>	И				08/24/2022	Anderson, Jan	lental He	alth Documents	Hello	Please op	en collect clients	Mental
Process Group Lunch	12:00 PM	1			Staff, Access								
Process Group		1 Scheduled	⊯ i	•	Supervisor,	08/23/2022	Thompson, Toby	-	Document - Thom			Toby's situation.	I wa
Process Group Lunch	12:00 PM	Scheduled Scheduled	⊨ i AP ê	-			Thompson, Toby	iagnosis lease ver				Toby's situation. Iyan's consents a	I wa

2. In the Progress Note screen, click the Reschedule icon.

rogress Note	e (MH)				🗳 : 🎝 🖄 🕒 👓	™ 🚢 🛠 ★ 🗘 🛍 🖽	? i 🖸 Save 🗅 🖶 🛅
Effective 11/22/20	D22 Status To Do		Author Clinicia	n, Robert	11/17/2022	00	Sign 💿 🖍 🕇
Service Note	Billing Diagnosis Warnings						•
Service						_	
Status	Scheduled	$\sim$	Start Date	11/22/2022 📋 🔻			
Program	Outpatient MH Adult	~	Start Time	1:00 PM			
Program Procedure	Outpatient MH Adult Therapeutic Behavioral Services	~	Start Time Travel Time	1:00 PM Minut			
•					25		

3. Your Staff Calendar screen will open, click and drag your mouse on the calendar timeslot you want to book.

				Clinician, Robert		
	SUN <b>11/20</b>	MON 11/21	TUE <b>11/22</b>	WED 11/23	THU <b>11/24</b>	FRI <b>11/25</b>
8:00 AM		C 8:00 AM - 10:30 AM	C 8:00 AM - 10:30 AM	C 8:00 AM - 10:30 AM	C 8:00 AM - 10:30 AM	C 8:00 AM - 10:30 AM
5.00 AM		Intake Hours	Intake Hours	Intake Hours 8:15 AM - 9:00 AM New event	<b>3</b> Intake Hours	Intake Hours
9:00 AM						
		<b>9:30 AM - 10:</b> CalAIM	-	-		-

- 4. In the New Entry Type window, click the radio button for Reschedule.
- 5. Click to select the reason for the reschedule.
- 6. Click OK.

New Entry Type	
🔿 New Calendar Entry	
○ New Service Entry	
🔿 New Primary Care Entry	
O New Resource E	
Reschedule	
Consumer Cancelled (Transport Is: 🗸	

- 7. The Service Entry window will open, ensure all the information in correct
- 8. Click Save to reschedule the appointment. Click the X to close.

-21-2022	Asano, Jason (1096)	×										6	¢ ⁰	"D 1	Acc	er 8	ff •	d
ervice Detai	il						Rogo	norato Ch	arge 🔒	<b>2</b> /-5	<b>₿</b> \$	<b>★</b> 🗘	<b>¢</b> :	i A₿	Save	•	C) ī	Ī
Service Detail	Billing Diagnosis Autho	orization(s)							7									
Service									0									
Client	Asano, Jason	Status	Scheduled 🗸	Start Date	11/22/2022 📋 🔻	Program	Outpatient MH /	dult N	~									
Procedure	Family Psychotherapy (Conjoint	t psychoti 🗸	Modifier	Start Time	11:00 AM	Total Duration	60 Minutes											
Clinician Name	Staff, Psychiatrist	~				End Date	11/22/2022											
Location	Office	$\sim$	Attending		~	Referring		```	/									
Client was present	Other Person(s) Present				Cancel Reason			```										
Group			Charge	\$156.60	Balance		Rate ID	<u>197</u>										
✓ Billable	🗌 Do Not Complete																	
Travel Time				Note	₩ i ♥ ASAM ? ATP ≜ ●													
Face to Face Time					(707) 555-4567				- 1									
Documentation Ti	ime								- 1									
				Override	e Charge Amount	Override	len By											
Evidence Based P	ractices	~		🗌 Override	e Errors	Override	len By											
Transportation Se	No		~	🗌 Interpre	eter Services Needed													

## How to Cancel a Client's Appointment

To cancel a client's appointment from your calendar, follow the steps below:

1. From your SmartCare home page, locate the Appointments for Today widget. **Click the appointment time** to the right of the patient you need to cancel.

	All Workgroup	s v	O Assi										2
Tracking Protocol			- ASSI	gned	Clinician, Robe	rt V				Notes	ISP	Assessment	Other
	All Flags		Отхт	eam Role	All Assigned Ro	les 🗸		Due Nov		0	0	0	Q
Flags Tracked	I	Due in	90-61 Da	iys	Due in 60-31 Days	Due in 30 Days or	Less Overdue	In Progr		0	0	<u>0</u>	2
Assessment Needed			Q		Q	1	8	Due in 1		Q	Q	<u>v</u>	Q
<u>CalOMS</u>			<u>0</u>		<u>0</u>	<u>0</u>	2	Co-Sign		<u>0</u>	0	<u>0</u>	3
CANS due for this client			<u>0</u>		<u>0</u>	Q	1	To-Sign		<u>0</u>	0	<u>_</u>	0
CSI admission			<u>0</u>		Q	Q	5	Assigned	ł		<u>_</u>	 0	
Staff Safety Concern			<u>0</u>		Q	Q	1			-	-	-	-
UMDAP Due			<u>0</u>		Q	Q	1						
Update Problem List			Q		Q	1	5						
WRAP			0		0	0	1	·					
ppointments For Today				C	New Alert/Messa	ges							2
Client Name/Description	Time	Status			From	Received	Client	Subject		Mess	age		
TestCH, Client(Ass	08:00 AM	Cancel			Rowe, Charla	11/17/2022	Asano, Hiro	Contact Note: App	ointment	Appo	intment - I	Client called and	cancelle
Process Group	10:00 AM	Show			Staff, Access	08/24/2022	Young, Butters	Please Contact		Hello, Please set outrea		outreach to clie	nt.Than
Lunch	12:00 PM	1			Staff, Access	08/24/2022	Anderson, Jan	1ental Health Doc	uments	Hello	<u>,Please op</u>	en collect clients	Mental
Asano, Jason(Thera	01:00 PM	Scheduled	🍽 i		Supervisor,	08/23/2022	Thompson, Toby	Diagnosis Docume	nt - Thom	<u>Hi, le</u>	t's discuss	Toby's situation.	I wa
Asano, Hiro(Assessment)	03:00 PM	Scheduled	ATP 📋		Sullivan, Ke	08/21/2022	Jones, Ryan	lease verify		Pleas	e ensure P	y <u>an's consents a</u>	re update
Paper Work	04:00 PM												

- 2. The Progress Note screen will open, click the drop-down menu in the Status field and select Cancel.
- 3. Click the drop-down menu in the Cancel Reason field and select the appropriate reason.
- 4. Click Save to cancel the appointment. Click the X to close.

rogress Note (I	MH)					🗳 : 🎝	2 9 6070 🚢 🛧 🛧 🗘 💵 ?	i 🖸 Save 🗅 🖶 🛅 🔉
Effective 11/22/2022	Status To Do		Author Cl	linician, Robert		11/17/2022	00	Sign 💿 🕵 🕂
Service Note	Billing Diagnosis Warnings							0
Service		2					_	
Status	Cancel	✓ s	tart Date	11/22/202	2 🛗 🔻			
Program	Outpatient MH Adult	~ s	tart Time	2:30 PM				
Procedure	Therapeutic Behavioral Services	~ T	ravel Time		Minutes			
Location	Office	~ F	ace to Face Time		Minutes			
Clinician	Clinician, Robert	C	ocumentation Tir	ne	Minutes			
		3 ਾ	otal Duration	30	Minutes			
Cancel Reason	Consumer Cancelled (Transport Issues)	<u>∼</u> 4	ttending			$\sim$		
		F	eferring			$\sim$		
Evidence Based Practi	ces	$\sim$						

## How to Document a No-Show Appointment

To document a No-Show Appointment, follow the steps below:

1. From your SmartCare home page, locate the Appointments for Today widget. **Click the appointment time** to the right of the patient you need to cancel.

								🕈 C	Assigned Docum	nent(s)			Ð
O Workgroup	All Workgroup	is v	O Assi	gned	Clinician, Rob	ert V				Notes	ISP	Assessment	Other
Tracking Protocol	All Flags		Отхт	eam Role	All Assigned R	toles 🗸			Due Now	Q	Q	Q	0
Flags Tracke	d	Due in	90-61 Da	ays	Due in 60-31 Days	Due in 30 Day	s or Less	Overdue	In Progress	0	<u>v</u>	<u>0</u>	8
Assessment Needed			<u>0</u>		Q	1		8	Due in 14	<u>0</u>	0	<u> </u>	<u>0</u>
<u>CalOMS</u>			<u>0</u>		<u>0</u>	<u>0</u>		2	Co-Sign	0	0	0	3
CANS due for this client			<u>0</u>		<u>0</u>	<u>0</u>		1	To-Sign	0	0	<u>_</u>	<u>_</u>
CSI admission			<u>0</u>		Q	Q		5	Assigned	0		<u> </u>	0
Staff Safety Concern			<u>0</u>		Q	Q		1		×	×	*	2
UMDAP Due			<u>0</u>		Q	Q		1					
Update Problem List			<u>0</u>		Q	1		5					
WRAP			0		0	0		1 🔹					
ppointments For Today	/			C	New Alert/Messa	iges							C
Client Name/Description	Time	Status			From	Received	Client	Su	bject	Mess	age		
TestCH, Client(Ass	08:00 AM	Cancel			Rowe, Charla	11/17/2022	Asano, Hi	ro Co	ntact Note: Appointment.	Appo	intment - (	Client called and	cancelle
Process Group	10:00 AM	Show			Staff, Access	08/24/2022	Young, Bu	utters Ple	ease Contact	Hello	<u>Please se</u>	t outreach to clier	<u>nt.Than</u>
Lunch	12:00 PM	1)			Staff, Access	08/24/2022	Anderson	, Jan Me	ental Health Documents	Hello	<u>,Please op</u>	en collect clients	Mental
Asano, Jason(Thera	01:00 PM	Scheduled	🍽 i	🛡 ASA	Supervisor,	08/23/2022	Thompson	n, Toby Dia	agnosis Document - Thom	<u>Hi, le</u>	t's discuss	Toby's situation.	I wa
	03:00 PM	Scheduled	ATP	C ASA	Sullivan, Ke	08/21/2022	Jones, Ry	an Ple	ease verify	Pleas	e ensure F	<u>lyan's consents a</u>	<u>re update</u>
<u>Asano, Hiro(Assessment)</u>													

- 2. The Progress Note screen will open, click the drop-down menu in the Status field and select No Show.
- 3. Click Save to cancel the appointment. Click the X to close.

rogress Note	e (MH)				🖹 : 🎝 I	2 🛛 GOTO 🚨 🏠 🛧 🗋 💵 (	? i 🖻 Save 🗅 🖶 🏛 🤇
Effective 11/22/20	22 🗮 Status To Do		Author Clinician	, Robert	11/17/2022	00	Sign 💿 💦 🕇
Service Note	Billing Diagnosis Warnings						1
Service		2					
Status	No Show	~	Start Date	11/22/2022	<b>≡ *</b>		
Program	Outpatient MH Adult	$\sim$	Start Time	2:30 PM			
Procedure	Therapeutic Behavioral Services	$\sim$	Travel Time		Minutes		
	Office	$\sim$	Face to Face Time		Minutes		
Location							

#### How to Schedule Non-Client Time on Your Calendar

To schedule non-client time on your calendar such as paperwork time, meetings, supervision, training, holiday, etc., follow the steps below:

1. From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book.

	Clinician, Robert	
	MON 11/21	
		<b>^</b>
C 8:00 AM - 10:30 AM Intake Hours	8:00 AM - 8:15 AM	
B-30 AM - 9:30 AM New event		he la
New event		
L		
	10:00 AM - 11:00 AM	
C 10:30 AM - 12:00 PM	10:00 AM - 11:00 AM Group Service: Process Group (#78)	
Client Assessment Time		

- 2. In the New Entry Type pop-up, select the New Calendar Entry radio button.
- 3. Click OK.



- 4. The Scheduler Event window will open, click in the subject Field and enter the subject for the calendar entry
- 5. Click the drop-down menu in the Appointment Type field and select the correct option.
- 6. Click the drop-down menu in the Show Time As field and select the correct option.
- 7. Click OK.

Subject CalAIM Training Location Specific Location Start Time 11/21/2022 B 09:30 AM 5 End Time 11/21/2022 10:00 AM All day Event Appointment Unavailable Show Time As Busy 6 Show Time As Clinician, Robert LCSW Licensed Clinica V	icheduler Eve	nt				•
Subject CalAIM Training Location Specific Location Start Time 11/21/2022 B 09:30 AM 5 End Time 11/21/2022 10:00 AM All day Event Appointment Unavailable Show Time As Busy 6 Show Time As Clinician, Robert LCSW Licensed Clinica V						:
Subject       CalAIM Training         Location       Specific Location         Start Time       11/21/2022         11/21/2022       09:30 AM         Show Time As       11/21/2022         Show Time As       Busy         Start Clinician, Robert LCSW Licensed Clinica V	Add					1
Start Time       11/21/2022       09:30 AM       End Time       11/21/2022       All day Event       All day Event         Appointment       Unavailable       Show Time As       Image: Clinician, Robert LCSW Licensed Clinica       All day Event       Image: Clinician, Robert LCSW Licensed Clinica	Subject					
Appointment Unavailable Show Time As Busy 6	Location		✓ Specific Location			
ype Show Time As Busy Staff Clinician, Robert LCSW Licensed Clinica	Start Time	11/21/2022 🛗 09:30 AM	End Time	11/21/2022		All day Event
	Appointment Type	Unavailable		Busy 🗸	6	
Description	Staff	Clinician, Robert LCSW Licensed	Clinica 🗸			
	Description					
	Pecurren	Do Not Update Exception				
Recurrence Do Not Update Exception(s)	ОК	Cancel Delet	te			

Here will be introduction to front desk ....

#### **Basic Navigation of the Staff Calendar**

Use the guide below to learn how to navigate the Staff Calendar screen,

- A. The View drop-down menu will allow to switch between calendar views of a single-staff, multiple-staff members based on a pre-defined group, or multiple-staff members that you can select.
- B. In the multiple-staff view, this will allow you to choose between pre-defined groups. In single-staff view, this will allow you to switch between staff members.
- C. The Intervals drop-down menu will allow you to tell SmartCare the time intervals you want the calendar to display. in. For example, if you select 30 minutes there will be two time slots in each hour on the calendar.
- D. The Define Group button will allow you to create your own customized staff group.
- E. The Apply Filter button will need to be clicked any time you make changes to A-C (listed above) in order for it to update the calendar below.
- F. The Today button will bring you back to today's date when you have navigated away to a different date.
- G. The Day, Week, and Month buttons will allow you to change between daily view, weekly view, or monthly view.
- H. The Refresh button will refresh the calendar and show you the most up-to-date information.
- I. The Forward and Back buttons will take you forward a day and back a day.

Staff Cal	endar 🔥		B		С	D	í	╡┇╬┎╴	B	ר
Multi-	Staff View	✓ Mh clinicians		~	30 Minutes Intervals 🗸 🗸	Define Group	< Showing 1-3/3 >		Apply Filter	
📋 Today	💼 Day 📋 Weel	K 🛗 Month	C Refresh	< >	Nov 22 2022					_
Ð	G	Clinician, Robert TUE 11/22	H	T	Stephan, Khristy TUE 11/22			sor, Clinician TUE 11/22		
										<b>•</b>
8:00 AM	<b>© 8:00 AM - 10:30 AM</b> Intake Hours				<b>С 8:00 АМ - 10:00 АМ</b> Intake Time					
9:00 AM										
10:00 AM	C 10:30 AM - 12:00 PM Client Assessment Time	<b>10:00 AM -</b> Group Serv	11:00 AM ce: Process Group (#		C 10:00 AM - 12:00 PM Client Assessment Time					
11:00 AM		_								

## How to Schedule an Appointment

To schedule an appointment, follow the steps below:

- 1. With the client open, click the Search icon.
- 2. **Type Appointment** in the search bar.
- 3. Click to select Appointment Search (My Office).

≡ SmartCare	Q 1. Test, Max (1091) ×
<b>≗</b> <u>∎</u> ≔	Q appointment 3
My Office >	S Appointment Search (My Office)       S Appointments For Today (Client)       Ins       30 Minutes Intervals
Lient >	Today 🖬 Day 🛱 Week 🗰 Month C Refresh < > Oct 20 2022
Program >	Clinician, Robert THU

- 4. In the Appointment Search screen, select the parameters for your search, such as:
  - Appointment type
  - Days of the week
  - Clinician, etc.
- 5. Click Search.

pointment Searc	ch									
Plan Any	∽ Ser	vice Area	Any	~	Programs	Any			~	
Location Any	∽ Sta	aff Any		~	License	Any	~	License Group	Any	~
Sex Any 🗸	Speciality A	ny	~	Category	Any	~	Allow Overt	booking Up to	Ap	pointment(s)
Minutes 15 From	8:00 AM	🕭 То	8:00 PM	₫ (	Any Week	4 🗹 M I	V T V	W 🗌 Т (	F	s 🗌 s
Only show time slots r	marked as Free		Appt. Type	Intake			e 11/17/202	22 🗎 🔻 🛛 Se	earch	
Ignore Age Range Pre	ference			Search for	Client Test, N	1ax	👲 🔍 🛛 🗤	nable to Offer a	a Time, 5	ıt.

6. A list of available appointments will populate below, **click the Schedule Appt icon** next to the appointment time you want to choose.

Minutes	15	From	8:00 AM	٢	To 8:0	00 PM	٩		Any Weekday	✓ M	🔽 Т	<b>v</b>	ПТ (	F	S	S	
🔽 Only	show t	ime slots ma	arked as Free		App	ot. Type	Intake		$\sim$	Start D	ate 12/0	06/2022	🗰 🔨 Se	earch			
🔽 Igno	ire Age	Range Prefe	rence				Se	arch for Cl	Test, Max		₫ (	Unal	ble to Offer a	<u>a Timel</u>	<u>y Appt.</u>		
6		Staff Nan	ne					Date/Time	•	Δ	Duration	ı	Туре		Loca	ation Name	
6	×	<u>Sullivan, ł</u>	<u>Kevin</u>				1	11/21/202	2 8:00 AM		210 min	s	Intake		Com Cent	munity Men er	tal Health
8	×	<u>Stephan,</u>	<u>Khristy</u>				:	11/21/202	2 8:00 AM		120 min	s	Intake				
6	×	<u>Clinician,</u>	<u>Robert</u>				:	11/21/202	2 8:00 AM		120 min	s	Intake				
ö	×	<u>Clinician,</u>	SUD				1	11/21/202	2 8:00 AM		120 min	s	Intake				
8	X	<u>Clinician,</u>	Robert				:	11/21/202	2 1:00 PM		180 min	s	Intake				

- 7. The Service Detail window will open, click the drop-down menu in the Program field to select a program.
  - Note: If a client is not yet enrolled in the program, an alert will pop up. This will not keep you from scheduling this appointment.
- 8. Click the drop-drown menu in the Procedure field and select the appropriate option.
- 9. Click the drop-down menu in the Location field and select the appropriate location.

	-					÷.	Client is not e		
Client	<u>TestCH, Client</u>	Status	8 cheduled ~	Start Date	11/21/2022	U,	Program	MH Screening	۰ ۲
Procedure	Assessment	```	Modifier	Start Time	8:00 AM		Total Duration	15	Minutes
Clinician Name	Clinician, SUD		9				End Date	11/21/2022	
Location	Community Menta	al Health Center 🔹 🚿	Attending			$\sim$	Referring		~
Client was present	Other Person(s) I	Present			Cancel Reaso	n			~
Group			Charge	\$0.00	Balance			Rate ID	
Billable	🗌 Do Not Comple	ete							
ravel Time		Minutes		Note					
ace to Face Time	e	Minutes							
Oocumentation Ti	ime	Minutes							
				Override	Charge Amou	nt	Overridd	en By	
Evidence Based P	Practices		$\sim$	Override	Errors		Overridd	en By	
ransportation Service No			~	<b>— .</b> .	ter Services Ne				

10. Click Save to schedule the appointment. Click the X icon to close this screen.

Q ★ LestCH, Client (1080) + ×			📽 📌 🕲 ? Access Staff - 🙂
Service Detail		Regenerate Charge 🕃	🎝 🗄 🖻 \varTheta 🛧 🛧 🗘 🌣 🔩 🖬 Save 📄 🗅 🛍 🗙
Service Detail Billing Diagnosis Authorization(s)			10
Service		0	
		Client is not enrolled in this program.	
Client TestCH, Client Status	Scheduled ∨ Start Date 11/21/2022 🗎 ▼ Pr	Program MH Screening V	
Procedure Assessment ~	Modifier Start Time 8:00 AM To	Total Duration 15 Minutes	
	-		

## How to Cancel an Appointment

To document a cancelled appointment, follow the steps below:

- 1. Click the Search icon.
- 2. Type Reception in the search bar.
- 3. Click to select Reception/Front Desk(My Office).



4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. **Click on the Status field and the word Scheduled**.

есер	tion/	Front	De	sk (15)												I	🗵 🔩 轅 💈	Ŕ
11/22	/2022	<b></b>	All V	/iews	✓ Al	ll Status	es	~		All	Clinicians	``	Apply	Filter				
		Time	Δ	Client Name		Flags					Procedure	Status		Staff	Balance		Comment	
<u>(0)</u>	0	<u>1:00 /</u>	<u>M</u>	<u>CTest, CTest (1118)</u>	i		D	i 🍽			testProcedure	<u>Sc</u>	heduled	4 garaju, Chitra		<u>\$0.00</u>	Add	
<u>(0)</u>	O	<u>8:00 A</u>	<u>M</u>	TestCH, Client (1080)	i						Assessment	Sc	heduled	Clinician, Robert LC		\$0.00	Add	
(1)	0	<u>10:00</u>	AM	<u>Asano, Jason (1096)</u>	i		i )	🛡 🚺 ASAM 💈	2		Family Psychother	. <u>Sc</u>	heduled	Staff, Psychiatrist		<u>\$0.00</u>	Add	
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- 5. The Change Status window will open, click the drop-down menu and select Cancel.
- 6. Next you will be prompted to enter a cancel reason, **click the drop-down menu** and select the **appropriate option**.
- 7. Click Change to cancel the appointment. The status will now show as Cancelled.



## How to Document a No-Show Appointment

To document a No-Show Appointment, follow the steps below:

1. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Locate the Status field **and click the word Scheduled**.

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- 2. The Change Status window will open, click the drop-down menu and select No Show
- 3. Click Change to cancel the appointment. The status will now show as No Show.



#### How to Reschedule an Appointment

To reschedule and appointment, follow the steps below:

1. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. **Click the number in parenthesis** to the left of the appointment time.

Note: This number indicates the number of times this appointment has been rescheduled.

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2. This will take you to the Staff Calendar screen to allow you to select a new appointment time. Click and drag your mouse on the calendar timeslot you want to book.

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C 10:30 AM - 12:00 PM		
Client Assessment Time		
-		

- 3. In the New Entry Type window, click the radio button for Reschedule.
- 4. Click to select the reason for the reschedule.
- 5. Click OK.



- 6. The Service Entry window will open, ensure all the information in correct
- 7. Click Save to reschedule the appointment. Click the X to close.

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#### **How to Handle Client Intake**

#### Front Desk: A client has arrived for their intake/assessment appointment. What do I do?

- f. Open the Staff Calendar, if not already done so.
- a. Click the Search icon.
- b. Type "Staff Calendar" in the search bar.
- c. Select "Staff Calendar (Staff)" from the search results.
- g. Find the client's appointment on the Staff Calendar and click on it to open.
- h. This opens the service note. Change the status from "Scheduled" to "Show." This will create an alert in the provider's SmartCare letting them know that their appointment has arrived.
- i. Open the Client Programs list page. Find your program on the list and click on the link in the Status column, which should be listed as "Requested."
- j. This takes you to the Client Program Details screen. Change the Status to "Enrolled". This unlocks the Enrollment Date field. Enter today's date in the Enrollment Date field. Click Save.
- k. The next steps in the process are to complete the intake documentation packet, confirm the client's information, and for the clinician to complete the clinical assessment. Complete the documents you are responsible for. The following instructions will walk you through the basics of completing any document in SmartCare. If you need additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).
- a. Search for the document by clicking the Search icon, typing in the document name, and selecting the document from the search results.
- b. Complete the document based on the client's responses. You are able to jump back and forth between documents, even if you haven't saved the document. Any unsaved documents can be easily accessed using the Unsaved Changes icon. You can also use the History icon to jump to recent screens and documents.
- c. Once you've completed the document, click Sign. This will save the document as a pdf.

- d. If the client and/or guardian needs to sign the document, click the Plus button to show the signature ribbon.
- e. Select the co-signer from the list and click Co-Sign.
- f. This brings up the pop-up signature window. The co-signer can now sign using a signature pad, a mouse, or a touchpad. Select the method of capturing the signature. If the cosigner needs to start over, click the Clear button to erase the current signature. Once the co-signer is happy with their signature, click the Save button. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
- I. If you have documents that were completed on paper that need to be scanned in to SmartCare, [INSERT INSTRUCTIONS ON HOW TO SCAN IN DOCUMENTS]

#### Front Desk: A person has walked in for an assessment at a walk-in clinic. What do I do?

- 2. Use the Client Search screen to determine if the person is a client already in the system.
  - e. If they are already a client in the system, select them to open their record.
  - f. If they are not a client in the system, create a new client.
- 3. Confirm the client needs an assessment. If you just created a new client, obviously they'll need an assessment. However, if the person was already a client in the system, you'll want to check to see if they already are connected to services.
  - a. Look at the Client Programs to see if the client is already open to a program that can share an assessment with your program.
  - b. Look at the client's Documents list page to see if they already have a valid assessment.
- 4. If the client does need an assessment, enroll them in your program.
  - a. Open the Client Programs list page.
  - b. Click the New icon.
  - c. Complete the Client Program Details screen.
- 5. The next steps in the process are to complete the intake documentation packet, confirm the client's information, and for the clinician to complete the clinical assessment. Complete the documents you are responsible for and let your clinical staff know that there is a client awaiting a clinical assessment. The following instructions will walk you through the basics of completing any document in SmartCare. If you need additional information on a specific form, see their respective section (e.g. Privacy and Consents; Clinical Documents; Intake and Other Forms; State Reporting).
  - a. Search for the document by clicking the Search icon, typing in the document name, and selecting the document from the search results.
  - b. Complete the document based on the client's responses. You are able to jump back and forth between documents, even if you haven't saved the document. Any unsaved documents can be easily accessed using the Unsaved Changes icon. You can also use the History icon to jump to recent screens and documents.
  - c. Once you've completed the document, click Sign. This will save the document as a pdf.
  - d. If the client and/or guardian needs to sign the document, click the Plus button to show the signature ribbon.
  - e. Select the co-signer from the list and click Co-Sign.
  - f. This brings up the pop-up signature window. The co-signer can now sign using a signature pad, a mouse, or a touchpad. Select the method of capturing the signature. If the cosigner needs to start over, click the Clear button to erase the current signature. Once the co-signer is happy with their signature, click the Save button. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.

6. If you have documents that were completed on paper that need to be scanned in to SmartCare, [INSERT INSTRUCTIONS ON HOW TO SCAN IN DOCUMENTS]

#### **Reception View**

- 10. Click the Search icon.
- 11. Type "Reception" in the search bar.
- 12. Select "Reception/Front Desk (My Office)" from the search results.



- 13. This will bring up the Reception/Front Desk view. **Select your program from the Views dropdown menu**. Your system administrator can set up the appropriate list for your location. If you've used this screen before, it should populate from the most recent view you used.
  - a. Click Apply Filter to apply the view filter.
- 14. To check in a client, click the link in the Status column.

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a. This will bring up a pop-up window which auto-populates to "Show." Click Change to check the client in.

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b. You can also use this to cancel the appointment or mark the client as a no-show. If you mark this as "Cancel," you'll need to enter the reason for cancellation. If you mark this as "cancel" or "no show," you can NOT undo this.

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	Cancel	~	
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15. If you need to reschedule an individual appointment, click on the left-most link. This will open the Staff Calendar, where you can enter in the new appointment time.

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#### a. Select the new appointment time.

b. This brings up a pop-up that now has "Reschedule" as an option. Select Reschedule.

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- c. Select the reason for the cancellation.
- d. Click OK to bring forward the old service information to this new service entry.



- 16. To schedule a follow-up for the client, click on the calendar icon. This will bring you to the Staff Calendar, where you can enter in a follow-up appointment.
- 17. You can add a comment to the service by clicking on the link in the Comment column.
- 18. To open the client's chart, click on the link in the Client column.

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## **State Reporting**



#### CSI

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#### How do I complete the CSI demographic record?

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#### How do I complete the CSI Assessment Data record?

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## **CalOMS**

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#### How do I complete the CalOMS Admission?

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#### How do I complete the CalOMS Referral/Transfer?

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#### How do I complete the CalOMS Discharge?

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## **Full-Service Partnership (FSP)**

Clients who are identified as Full-Service Partnership (FSP) clients under the Mental Health Services Act (MHSA)have additional reporting requirements. These do not replace the need for a CSI or CalOMS report, but are in addition to them. In this section, we'll cover the required FSP documents. Depending on your county, this information will either be extracted from SmartCare and uploaded into the State's database or will have to be manually entered into it. Check with your county to determine what your process for FSP data is.

#### How do I complete a PAF?

- 1. You must first have the client open, then **click the Search icon**.
- 2. Type "FSP" into the search bar.
- 3. Click to select "California FSP PAF (Client)" from the search results.



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG	Program Enrollment	<b>?</b> ×
	Select Program Enrollment	4
	MH Screening-10/03/2022	~
	OK Cancel	

6. The PAF document will open. Most of the screen will be blank until you enter the partnership date. This will determine what your client's PAF form will look like.

alifornia FSP PAF				<b>E</b> :	よ 🖻 \varTheta дото 🛔	\$,	Save X
Effective 01/24/2023	atus New	Author	Rowe, Charla	~	00	Sign 🥑	
Partner/Residential/Education							1
Initial							-
FSP Program Name	Outpatient MH Adult 01/13/23	~	GUI ID		66562129-4C7C-45	-17168481AB2F	
Partnership Service Coordinator (PSC)	Clinician, Robert	~	Partnership Date		iii ▼		
Partner County	Imperial	~	Referral Source			~	
DOB: 06/07/2002	Partnership Age:		Partnership Form Ty	pe:			
alifornia FSP PAF				F :			Save X
Effective 01/24/2023	atus New	Author	Rowe, Charla	~	00	Sign 🖸	
Partner/Residential/Education	Employment/Financial Jus	stice/EI/Heal	th/SU				0
Initial							Î
FSP Program Name	Outpatient MH Adult 01/13/23	~	GUI ID		66562129-4C7C-4 6		
		•	GOLID		00502129-4070-4	-17168481AB2F	

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Partner/Residential/Education	Employment	/Financial Justi	ice/EI/Hea	lth/SU			
nitial							
FSP Program Name	Outpatient MH A	dult 01/13/23	~	GUI ID		66562129-4C7C-4 6	-17168481AB2F
Partnership Service Coordinator PSC)	Clinician, Robert		~	Partnership Dat	e	01/24/2023	
Partner County	Imperial		~	Referral Source			~
DOB: 06/07/2002	Partnership Age	: 20		Partnership For	m Type:	PAF TAY	
FORMER AB2034 Partner	🔿 Yes 오 No			Additional Progra currently involve		Governor's Homeless In	itiative (GHI)
						MHSA Housing Program	
Residential Information (i	includes hosp	italization and i	ncarcera	tion)			
Please check at least one check	box PRIOR TO T	HE LAST 12 MONTH	S				
Setting		Most recently wher	1?		During the Pa # Occurrence	st 12 Months Indicate the To mass # Days (must = 2	
Child/TAY Residential Informa	ation - General Li	ving Arrangement					
General Living Arrangement							
With one or both biological/adop	ptive parents	Tonight	11:59 p.m.	. the day BEFORE	0		
		the partnership)					

a. There is a lot of logic built into the form. If you need help understanding how to complete this form, talk to your supervisor or FSP manager for assistance. We have put in tips to try to help, but these forms may be overwhelming for some.

Time Spent in Education Current/Past Twelve Months	checkbox IS CURRENTLY!	
Note for TAY - For Youth Who are NOT Required by Law to Attend School		
For the educational settings below, indicate where the partner	Was During THE PAST 12 MONTHS # of weeks	is CURRENTLY
Not in school of any kind	0	
High School/Adult Education	0	
Technical/Vocational School	0	
Community College/4 year College	0	
Graduate School	0	
Other	0 O	
Total # of Weeks MUST = 52		

7. Once you've completed all fields on all tabs, **click Sign** to complete and generate the document.

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• <b>CO</b>	Sign 💿 < 🕂

#### How do I complete a KET?

- 1. You must first have the client open, then click the Search icon.
- 2. **Type "FSP"** into the search bar.
- 3. Click to select "California FSP KET (Client)" from the search results.



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG Program Enrollment	<b>?</b> ×
Select Program Enrollment	4
MH Screening-10/03/2022	~
OK Cancel	

6. The FSP KET document will open. **Complete the document**. There is logic built into the form, based on the FSP KET reporting rules. If you need help understanding how to complete this form, talk to your supervisor or FSP manager for assistance.

ffective 01/24/2023	itus New	/		Author	Rowe, Charla	~	00		Sign 🗿 <
artner/ Residential/ Education	Employ	yment/ L	egal Issues/ Desig	gnations	s Emergency Inter	vention			6
nitial									
Current FSP Program Outpatie	nt MH Adul	t N	/	Partners	hip Assessment Date	01/14/2027	<b></b>		
KET Completion Date 01/24/	2023 🛗	•							
DOB 06/07/	2002		Partnership Age	e	20	Partr	ership Form Type		
is there a change in Partnership I Is the partner currently involved	nformation I <b>in:</b>		es ONo Cha	ange	Date of AB2034 Chan	ge		<b>H -</b>	
is there a change in Partnership I is the partner currently involved AB2034	nformation I <b>in:</b>		No Change	ange		-		iii •	
Is there a change in Partnership I Is the partner currently involved AB2034 Governor's Homeless Initiative	nformation I <b>in:</b>		No Change	ange	Date of AB2034 Chan Date of Governor's Ho	-	e change	iii ▼ iii ▼	
Change in Partner Informat Is there a change in Partnership I Is the partner currently involved AB2034 Governor's Homeless Initiative GHI) MHSA Housing Program	nformation	○ No ○ No	No Change	ange		- omeless Initiative			
Is there a change in Partnership I Is the partner currently involved AB2034 Governor's Homeless Initiative GHI) MHSA Housing Program	nformation I in: Ves Ves Ves	○ No ○ No	<ul> <li>No Change</li> <li>No Change</li> </ul>	ange	Date of Governor's Ho	- omeless Initiative			
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is there a change in Partnership I is the partner currently involved AB2034 Governor's Homeless Initiative GHI) MHSA Housing Program Change in Partnership Informati New Full Service Partnership Prog	nformation I in: Yes Yes Yes on iram ID	○ No ○ No	<ul> <li>No Change</li> <li>No Change</li> <li>No Change</li> </ul>		Date of Governor's Ho Date of MHSA Housin	omeless Initiativo g Program Chang ice Partnership F	ge Drogram ID	iii ▼	
Is there a change in Partnership I Is the partner currently involved AB2034 Governor's Homeless Initiative GHI)	nformation I in: Yes Yes Yes on iram ID	○ No ○ No	<ul> <li>No Change</li> <li>No Change</li> <li>No Change</li> </ul>	~	Date of Governor's Ho Date of MHSA Housin Date of New Full Serv	g Program Chang ice Partnership F hip Service Coor	ge Program ID dinator ID	iii ▼ iii ▼	

7. Once you've completed all fields on all tabs, **click Sign** to complete and generate the document.



- 1. You must first have the client open, then **click the Search icon**.
- 2. Type "FSP" into the search bar.
- 3. Click to select "California FSP 3M (Client)" from the search results.



- 4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
- 5. Click OK to continue.

CDAG	Program Enrollment	<b>?</b> ×
	Select Program Enrollment	4
	MH Screening-10/03/2022	~
	OK Cancel	

6. The FSP 3M document will open. **Complete the document**. There is logic built into the form, based on the FSP 3M reporting rules. If you need help understanding how to complete this form, talk to your supervisor or FSP manager for assistance.

alifornia FSP 3M			🗳 : 🎝	🖻 \varTheta GOTO 🚢 🧞 🖡	🗊 🖶 🗋 🖬 Save
Effective 01/24/2023	Status New	Author Rowe, Charla	~	00	Sign 💿 🗲 🕇
Partner/Residential/Education	Financial Legal/Health/SU				6
Initial					
Current FSP Program	Outpatient MH Adult	Partnership Assessment Date		01/18/2023	<b></b>
Effective Date of Assessment	01/24/2023	Date of the most recent FSP A	ssessment (PAF or 3M	)	<b>*</b>
DOB: 06/07/2002	Partnership Age: 2	1	Partnership	Form Type: TAY 3M	
	iving special education due to serious		Yes ♥No Yes ♥No		
Education-For Children/Y	outh who are required by law	to attend school			
Estimate the child/youth's atten	dance level CURRENTLY:	CU	RRENTLY, the child/you	th's grades are:	
Always attends school (never	truant)	01	'ery Good		
Attends school most of the tir	ne	00	iood		
O Sometimes attends school		04	verage		
O Infrequently attends school		0 e	elow Average		
O Never attends School		0 F			

7. Once you've completed all fields on all tabs, **click Sign** to complete and generate the document.



## **Other Functionality**

Introduction?

# How do I create a flag to alert treatment team members to important client information?

1. Make sure you have the client open. Click the plus icon next to the client's name.



- 2. This takes you to the Client Flag Details screen. Add the relevant information in the Note Information section. Your user role may only allow certain information to be completed. For example, a supervisor may have additional permissions that a clinician does not.
  - a. Select the type of flag. Your system will have a list of flags to choose from.
  - b. Make sure to include your program. This will ensure client privacy is upheld.
  - c. Select the level of the flag. The options are: Information, Urgent, and Warning.
  - d. Enter the specific language of the flag in the Note field.
  - e. Enter the display date. If there is a due date, enter the Open Date (date it became available) and the Due Date (the date the task is due).
  - f. If you need to assign this task to a specific user, you can enter that information in. You can also assign this task based on the treatment team role. An example would be to alert all nurses working with the client of a lab that's due.
  - g. Enter any additional comments as needed.
  - h. You can also choose how the flag is displayed. If you want this flag to show as a pop-up when opening the client's chart, make sure to mark "Always Pop Up."
  - i. Once you've entered all the information, click Insert.
  - j. This adds the flag to the Note List section at the bottom of the screen.

Note Informatio	n 2		a					
Туре		~ I		Work Group		<ul> <li>✓</li> </ul>	Active	
Level		✓ Protocol		$\sim$	Protocol Flag ID	Program	Outpatient MH	H Adult-01/13
Note						d This	s flag recurs	
Open Date	🛗 🔻 Dis	splay Date	Ē	🖿 🔻 Due Date	🗎 🕶 Er	nd/Completed Date		<b></b>
Link to						Completed By		$\sim$
Nothing			(f)					
Document			Open Assig	gned Users		Assigned Roles		
				No data te	o display		No data to di	splay
Comment				No data te	o display	_	No data to di	isplay
Comment	1	Do not display fla	Ag	No data te	o display	p Up	No data to di	isplay
	ş 🗌 Ç	)o not display fla	L			p Up	No data to di	isplay
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Permissioned Fla	v Active Only		_	Never Pop Up	Always Po		Insert	Clear
Permissioned Fla	v Active Only	Work Group	ig Level Information		Always Po	End		Clear Created On

3. Once you've added all flags, **click Save**. You are now finished and may close this screen.



#### How do I scan a document into the client's record?

Sometimes documents are completed on paper, but need to be included in the client's record. In this section, we'll cover how to scan a document into the client's record.

- 1. Click the Search icon.
- 2. Type "Scanning" in the search bar.
- 3. Select "Scanning (My Office)" from the search results.



- 4. To scan, you need a scanner attached to your workstation. Scanning will use your scanner's software but save it in SmartCare.
  - a. To scan a single document, click the "Scan New Images" icon.

b. To scan multiple documents in a batch, click the "Start Scan Upload" button.

Scanning (0)						1	Start B	atch Uploa	ad Start Bat	ch Scan 🕑	ı⊠ ✿	* 7 *
All Associations	~				All Reco	rd Types			-	✓ Apply I	Filter	
Show Scanned/Uploaded	~	Staff, Access		~	Not Con	pleted	~					
Effective Dates Between		🛗 🔻 And	<b></b>	Cre	eated Be	tween 12/21/	2022	🛗 🔻 And	01/21/2023	<b></b>		
Associated With	ID	Name	Record Type	Crea	ted ⊽	Effective	Scar	nned By	Status	BatchId	Provider	
				No data t	o display	,						•

## How do I upload a document into the client's record if I don't have a scanner?

- 1. Click the Search icon.
- 2. Type "Scanning" in the search bar.
- 3. Select "Scanning (My Office)" from the search results.



- 4. You can upload documents one at a time or as a batch.
  - a. To upload a single document, click the "Upload New Images" icon.
  - b. To upload multiple documents in a batch, click the "Start Batch Upload" button.

All Associations					All Boos	rd Turpoo			b	<ul> <li>Apply</li> </ul>	a	
wit Associations	~ ~	Staff, Access		~	Not Com	rd Types	~			~ Арріу	riller	
ffective Dates Between		🛗 🔻 And	<b>≡ ▼</b>	Cre	eated Be	tween 12/21/	2022	🛗 🔻 And	01/21/2023	<b>*</b>		
ssociated With	ID	Name	Record Type	Crea	ted ⊽	Effective	Scar	nned By	Status	BatchId	Provider	
				No data t	o display	(						•

5. Choosing upload will open the Upload File Detail screen. This will include a pop-up. **Click Select** to find the file on your computer.

Upload File Detail		📭 🗋 Save	• ×
	▼	▲ Effective IIII ▼	
Record Type	<ul> <li>✓ Description</li> </ul>	Program	
Image Details	Image Upload 📀 🗴		
Delete File Reload File Reload			
	Please select a file. 5 Select Upload Cancel		
		0	

6. Once it's ready, a little green circle will appear next to it. **Click Upload**.

Image Upload	? ×
Please select a file. star referral.pdf Remove Select	
6 Upload	Cancel

- 7. This will show you the PDF. Confirm you uploaded the correct document. **Make corrections as needed** using the buttons at the top of the PDF viewer.
- 8. Select "Client (Medical Records)" from the first dropdown menu.
- 9. Click on the "..." button to find the client.



a. This will bring up the client search. Use the client search to find the client. Click Select when you've located the client.

Last Na	ame Tra	Narrow Search T	ype of Client 💽 First Name	Manual	rganization	Program	nt Search	~
ner Seai	rch Strategi	es						
SSN	N Search			Phone #	# Search			
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Primar	y Clinician Sea	arch	~	Client I	D Search			
Auth	orization ID / 🕯	<b>#</b>		Insured	ID Search			
cords Fo	ound							
				SSN/EIN	DOB	Status	<u>City</u>	Primary Clinician
<u>ID</u>	Master ID	<u>Client Name</u> △	Chosen Name	SSIN/EIN	000		-	
<u>ID</u> 1239	Master ID 1239	Client Name $\Delta$ Training, Manual	Chosen Name	9999	06/07/20	Active	-	

- 10. Select the Record Type.
- 11. Enter the description of the document.
- 12. Enter the program the document is associated with.
- 13. Enter the Effective date of the document.
- 14. Click Save.

