

Front Desk User Guide

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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

	Smar	rtCare
Usern	ame	
*	MHClinician	c
Passv	vord	
-		
Rei	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?

- In the Answer field, type the answer to your chosen security question

 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?	\sim
Answer		
Security Question 3	In what city did you first get married?	\sim
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 th	e Authenticatior	n Key sent to the <mark>R</mark> e	gistered Device.
Authent	ication Key		
	Validate	Send Again	Cancel
)o not ha	ave access to De	evice?	



Basic Navigation and Functionality

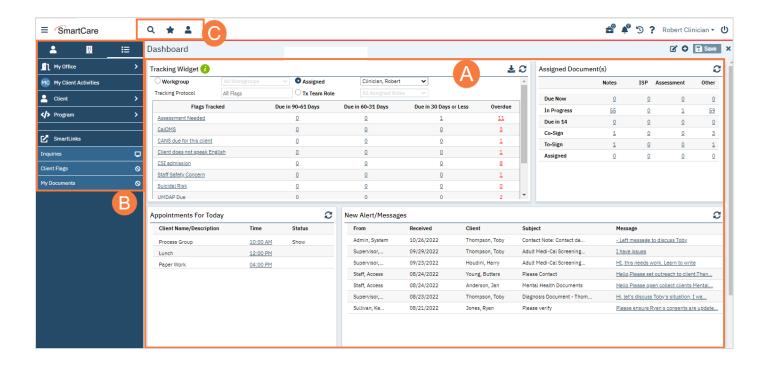
This section will cover basic SmartCare functionality, terminology, and navigation.

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



Icons

The Header, pictured below, consists of several icons.



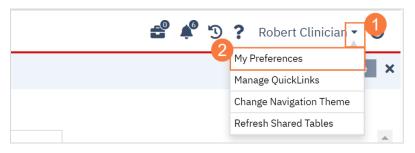
The Icons and Functionality table below describes each icon.

	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
E ⁰	The Unsaved Changes icon will display a list of screens that you made changes to but navigated away from before saving
Å [®]	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, Robe	rt V		^		Notes	ISP	Assessment	Other	ŗ
racking Protocol	All Flags	🔿 Tx Team	Role					Due Now	Q	Q	Q	0	1
Flags Tracke	d	Due in 90-61 Days		Due in 60-31 Days	Due in 30 Days or Les	s Overdue		In Progress	55	<u>0</u>	1	59	
ssessiment Needed		Q		Q	1	11		Due in 14	0	0		0	
alOMS		<u>0</u>		<u>0</u>	<u>0</u>	<u>3</u>		Co-Sign	1	0		3	
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lient does not speak English	h	0		<u>0</u>	<u>0</u>	1	-		0	0	0	0	1
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	Time	Status	C	New Alert/Message		lient	Subject	_	Messa		<u>U</u>	2	_
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Client Name/Description	Time <u>10:00 AM</u>	Status	Ø	From Supervisor,	Received C 09/29/2022 T 09/23/2022 H	hompson, Toby	Adult M	edi-Cal Screening	Messa <u>I have</u> <u>HI, thi</u>	ge issues s needs wo			2
Client Name/Description	Time <u>10:00 AM</u> <u>12:00 PM</u>	Status	0	From Supervisor,	Received C 09/29/2022 T 09/23/2022 H 08/24/2022 Y	hompson, Toby	Adult M Adult M Please (edi-Cal Screening edi-Cal Screening	Messa <u>I have</u> HI. thi Hello.f	ge issues s needs wo Please set o	ork. Learn to write	.Than	
pointments For Today Client Name/Description Process Group Lunch Paper Work	Time <u>10:00 AM</u> <u>12:00 PM</u>	Status	C	From Supervisor, Supervisor, Staff, Access	Received C 09/29/2022 T 09/23/2022 H 08/24/2022 Y 08/24/2022 A	hompson, Toby A loudini, Harry A oung, Butters F nderson, Jan F	Adult M Adult M Please (Aental	edi-Cal Screening edi-Cal Screening Contact	Mossa I have HI, thi Hello,I Hello,I	ge issues s needs wo Please set i Please ope	ork. Learn to write	.Than 1ental	

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		Assigned	Clinician, Robert	\sim	
Tracking Protocol A	ll Flags	◯ Tx Team Role			
Flags Tracked	Due in	90-61 Days I	Due in 60-31 Days	Due in 30 Days or Less	Overdue
Assessment Needed		<u>0</u>	<u>0</u>	<u>1</u>	11
<u>CalOMS</u>		<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		0	0	0	1

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

O Workgroup		Assigned	Clinician, Robert	~	
Tracking Protocol	All Flags	🔿 Tx Team Role		\sim	
Flags Track	(ed	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 Englis	sh	0	0	0	1

The Appointments For Today Widget

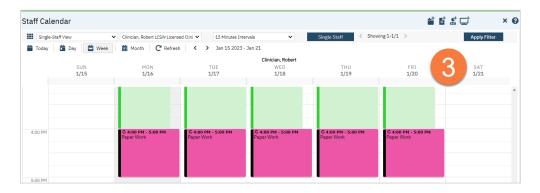
1. This widget allows you to see your daily schedule at a glance. This includes non-client time, such as meetings and time off, as well as client appointments. Clicking on the link will take you to that appointment.

pointments For Today			ç
Client Name/Description	Time	Status	
Another, Test(Ther	<u>09:30 AM</u>	Scheduled 📋	ASAN
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, Robert	01/11/2023	00	Sign 🗿 🛃 🕇
Service Note Bill	ing Diagnosis Warnings Di	sposition				
Service						2
Status	Scheduled	~	Start Date	01/16/202	3 iii -	
Program	Outpatient MH Adult	~	Start Time	9:30 AM		
Procedure	Therapeutic Behavioral Services	✓ Modifi	er Travel Time		Minutes	
Location	Community Mental Health Center	~	Face to Face Tim	e	Minutes	
Clinician	Clinician, Robert		Documentation 1	lime	Minutes	
Mode Of Delivery	~		Total Duration	45	Minutes	
Cancel Reason		\sim	Attending		~	
			Referring		~	
Evidence Based Practices		~				
Custom Fields						
Interpreter Service						

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			C
	Current	Not Seen in 3 Mos	Last Year
Primary	<u>106</u>	<u>91</u>	0
Total	108	<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.

≗ <u>∎</u> ≔	My Caselo	oad (1	106)										☆ '	*:	2
My Office >	Primany Clien	ts	✓ Seen in X days	1	v 1	.ast Name Begins	with Any Lett	ter 🗸 A	ll Programs	~		A	pply	Filter	l
> Program >		nd In Trea	atme 🗸 All Note/Icon	Types	✓ St	taff Clinician, F	Robert C	Organizati	onal Hierarchy					•	1
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omarcanto	Anna Anna A				12/30/2022	12/30/2022	Yes		Clinician, Robert	Program Assignmer	Ê,	SAM	•		
	Andrea Jack	-	BECCHARGE PARTY		01/11/2023	01/04/2023	Yes		Clinician, Robert	Program Assignmer	Ê	∞ <u>∧</u>	ASAM		
	former for	-					Yes		Clinician, Robert		ATP	Ê	0		
	Anna Anna A		111.00.000.00		11/18/2022	11/18/2022	Yes	Registered	Clinician, Robert		Ê /	SAM	*		
	frame laws	-	TOTAL COLUMN		01/07/2023	12/02/2022	Yes	Registered	Clinician, Robert	Primary Clinician, Pr	1	i	0	SAM	ø
	Anna Anna	-			12/19/2022		Yes		Clinician, Robert	Program Assignmer	Ê				
	from Joseff	-			09/22/2022		Yes	Registered	Clinician, Robert		Ø	i	1	V A	5A
	from local	-					Yes	Registered	Clinician, Robert	Program Assignmer	Ê		i	V A	5A
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	farm. Inc. 1	-			12/20/2022		Yes	Registered	Clinician, Robert		Ø	i		∞ <u>A</u>	5A
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	farme for 1	-			09/23/2022		Yes		Clinician, Robert		Ê,	SAM	\$		
	factoria. A	-					Yes		Clinician, Robert						
	feet days		716 88 101 74		12/23/2022		Yes	Registered	Clinician, Robert		Ê		i	Ø	
	Stra. inc. i	-			12/13/2022		Yes		Clinician, Robert		ATP	Ê	0	0	¥
	Stim.lond	-			01/10/2023		Yes		Clinician, Robert		Ê				
	from Jaco	-			12/23/2022		Yes	Registered	Clinician, Robert		Ê		i	V AS	5A
	And in case of						Yes	Registered	Clinician, Robert		Ĥ	10	;	D AS	

The SmartView

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

Client Dashboard				9	🗹 <table-cell-rows> 🖬 Save</table-cell-rows>
Upcoming Appointments(0) No data to display	All <i>C</i>	Current Medication(0) No data to display	All Z	Treatment Team Role No Information	All 2
Client Tracking			AII C	Documents To Do(382)	C
MH Outpatient			~	CSI Standalone 2022-04-01	<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				2			9 🗹	0 🗄	Save
Jpcoming Appointments(31)	All C	Current Me	edication(0)		SmartView			í	C >
PsychoTherapy on 01/23/2023 with Clinician, Robert	at 08:00 AM		No data to disp	olay	BMI			Þ	<u>.</u>
<u>Alcohol and/or drug services; g</u> by a clinician on 01/23/2023 a Clinician, SUD	roup counseling t 11:00 AM with				BN	41	Wei	dht	
<u>Alcohol and/or drug services; g</u> <u>by a clinician on 01/25/2023 a</u> <u>Clinician, SUD</u>							200	5.11	-
<u>Alcohol and/or drug services; g</u> by a clinician on 01/27/2023 a				_			180	0.10.30.50.	70.9
Client Tracking									
MH Outpatient					Vitals			Ţ	2
0%						No Inform			
Task		Statu	IS	Date		NO INION	ation		
Demographics Updat	e Due	In Prog	ress	01/29/2	Allergies		-	Ţ	2
					AL	lergies		Туре	
						No Inforn	nation		
Summary					Medications		2	Ţ	1
Name : Another, Test	DOB	: 10/10/1990	Ageom@2Address Year	: 123 hear	Name	Instruction	Start		End
Iome Phone : 8881234444	E-Mail	:	fedi	CAS	Name	No Inform			End
Emergency Contact :	Primary Clinician	:	Primary Physicia	an :		110 1110111	ation		
Surrent Balance \$0.00	Last Seen On	· 01/11/2023			Treatment Tean	n	-	Ţ	2
Current Allergies(0)		BMI			Role		Nam	ie	

- 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 ★ Another, Test (1209) 🗎 🖾	<u>au + ×</u>						🗳 🌾	Rober	t Clinic	an - 也
Client Dashboard						3		9 🗹	0 🗄	Save X
Upcoming Appointments(31) All C	Current Medication(0)	all <i>C</i>	Treatment Tean	ı	AII 2	S	imartView		h	X
PsychoTherapy on 01/23/2023 at 08:00 AM with Clinician, Robert	No data to display		Role Program Assignn	ant Staff:	Name		Vitals		Į 🖵	
Alcohol and/or drug services; group counseling by a clinician on 01/23/2023 at 11:00 AM with			Outpatient MH	Adult*	Clinician, Robert Staff, Psychiatrist	Ŀ	No Info	rmation		-
Clinician.SUD Alcohol and/or drug services: group counseling by a clinician on 01/25/2023 at 11:00 AM with Clinician,SUD			CONTROL TEA		stan, r sysmatrist	ľ	Allergies		Ģ	₽
Alcohol and/or drug services; group counseling							Allergies		Туре	
by a clinician on 01/27/2023 at 11:00 AM with							No Info	rmation		_
Client Tracking		<u>All C</u>	Documents To D	Do(387)	C		Medications		Ģ	2
MH Outpatient		~	CSI Standalone Collection	2022-04-01	<u>To Do</u>		Name Instruction	C 111		End
0%			Narrative	2022-06-03	In Progress		Name Instruction No Info	Star		End
Task	Status Date		Narrative	2022-08-06	In Progress		NOTING	mation		
Demographics Update Due	In Progress 01/29/20	23	Adult Screening Tool	2022-08-19	In Progress		Treatment Team	-	Ģ	₽
			Narrative	2022-08-22	<u>To Do</u>		Role	Na	ne	
			Narrative	2022-08-25	In Progress		Program Assignment Staff: Outp MH Adult*	atient Clin	ician, Ro	bert
Summary		C					<unknown role="" team=""></unknown>	Staf	f, Psychia	atrist
Name : Another, Test DOB	Year heavy	irhardt St rton,					Client Tracking	2	Ģ	\$
Home Phone : 8881234444 E-Mail	: CA 90	0001					MH Outpatient			~
Emergency Contact : Primary Clinician	: Primary Physician :									•
Current Balance : \$0.00 Last Seen On	• 01/11/2023						096			
Current Allergies(0)	ВМІ	AII C					Task Demographics Update Due	Status In Progress		ate //2023
© Streamline Healthcare Solutions SmartCare CalMHSASmart	BMI Weight		_			•		16000	2201170	5.7602

Specialty Mental Health Services Clinical Documentation User Guide

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)"



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

		.smartcarenet.com/CalM martcareTrain 09-21-202		Itcarein	ain, baser ages, Appi	cativ	on.aspx: desci	u=200time	=01/00	72023333000	Loadron ostback-				* 🗆 😫
SmartCare		Q ★ 🛔										-	P 🔊 ?	Acce	ss Staff 🔻
	≣	Ter en vinie e (4 (0)	\												×⊞⁺⊞
	=	Inquiries (162))											<u> </u>	
1 My Office	>												- 3		
Client	>	Recorded By All	~	Assign	ied To All	~	All Dispositio	ons	~	All Status	~	All Inqui	гу Туре	~	Apply Filter
Program	>	All Programs	~	All Loc	ations	~	All Urgency I	.evel	~	All Contact Ty	rpe 🗸	All Priori	ty Population	~	
		From 01/01/1900	iii -	To 12/	31/9999 🛗 🕶		Last Name			First Name		Phone			
Administration	>														
SmartLinks		Client (Potential)	Client	Id	Inquirer		Start Date			ded By	Assigned To	Dis	position		ry Status
		Print, Strip	<u>1223</u>		The second		1/4/2023			an, Robert				In Pro	-
opointment Search	0	fan, Regeration	<u>1220</u>		fact, Registration		1/3/2023			Charla				In Pro	-
								10:53 AM						In Pro	
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		Test, Transme	<u>1214</u>		Test, Transme			22 2:58 PM						Compl	
		100.00	<u>1213</u>			۰.	12/29/202							In Pro	-
		Augence, Arrana	<u>1209</u>		Automatica, Arriente			22 8:25 AM						In Pro	
		fact, factoge	<u>1208</u>		fan, fan ge			2 8:17 AM						In Pro	
		Tana, China	<u>1207</u>		Tana, China			22 5:02 PM			Clinician, Rober	t		In Pro	
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		Test, Sectors	<u>1206</u>		fact, features			2 12:55 PM						In Pro	-
		California, Sta	<u>1203</u>		Castoria, Str.					ns, LaQuita				In Pro	
		fan, henrige	1201		fact, factoring		12/27/202	2 4:10 PM	Clinicia	an, Robert				In Pro	gress
		second records.	<u>1200</u>		second encode	۰.	12/27/202	2 4:01 PM	Fitzger	rald, John				In Pro	gress
		Harry, Taat	<u>1196</u>		Harry, Taur			2 1:44 PM						In Pro	-
		Public, Narry			Parties, Party			2 1:27 PM						In Pro	
		hadren and the second	<u>1195</u>		pressources, and			2 1:18 PM			Sullivan, Kevin			In Pro	
		farm, Regime	<u>1194</u>		farm, fragmer		12/27/202	2 1:12 PM	Staff, /	Access				Compl	
		Roberts, Colle	<u>1192</u>		Roberts, Colly		12/26/202	2 9:49 PM	Willian	ns, LaQuita				In Pro	gres 🤈
		Tage Count	1190		Test Comp.		12/23/202	2 4:13 PM	Rowe.	Charla				Compl	ete

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)".

Client Search						? ×
Clear Name Search Include Client Conte	acts 🗌 Only Include Act	ive Clients (Checking wil	l not allow c	ption to crea	ate new Client)	
Broad Search Narrow Search	Type of Client Ind	dividual Organization	All Clier	nt Search	~	
Other Search Strategies						
SSN Search		Phone # Search				
DOB Search Primary Clinician Search	iii ▼ ▼	Master Client ID Search	arch			
Authorization ID / #		Insured ID Search				
Records Found						
ID Master ID Client Name	△ <u>Chosen Name</u>	SSN/EIN DOB	<u>Status</u>	<u>City</u>	Primary Clinician	
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						L
	No data	a to display				1
۲						ň
				Se	lect Canc	4
					Inquiry (New C	lient)

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 option to create new Client)	
Broad Search Narrow Search Type of Client O Individual Organization All Client 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	-1
ID Master ID Client Name	_
	Î
No data to display	
	-
۰ a	
Select Cancel	
Inquiry (New Clie	mt)

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	is	a					
Relation To Cli	ent Self	v	First Name	lanual 🧲	Middle Name	Las	t Name Training	
Call Back	(916) 555-7878		Ext		Email			
Start Date	01/06/2023 1	Y 🛗 ▼	Start Time 0	5:16 PM Now				
Client Info	rmation (Potentia	al)			-			
First Name	Manual 🚽	moute Na	me	Last Name	Training	Client ID	Sex	Male 🗸
SSN		SSN Un	known/Refused	DOB	06/07/2002	🛗 🔻 Age (20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell		Email				
Client is not	Client is homeless	<u> </u>	Client is chronically eless	Urgency Let	vel *			~
Address1				Inquiry type	e			~
Address2				Contact typ	e *			~
City				Priority Populati	on			~
State	~	Zip		County of Resident	Search here			
	blem			Current Clie	nt Information (If a	anv)		

- 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.

	formation 🗌 Cri	sis							
Relation To Cl	ient Self	~	First Name	Manual	Μ	liddle Name	Last Na	ame Training	
Call Back	(916) 555-7878	3	Ext		E	mail			
Start Date	01/06/2023	т ү 🛗 🕶	Start Time	05:16 PM	Now				
	(Deterne)	:1)							
Client Info	ormation (Potent	iai)							_
First Name	Manual	Middle Nam	ie		Last Name	Training	Client ID	Sex Male	~
SSN		SSN Unk	nown/Refuse	d	DOB	06/07/2002	Age (20 Years)	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell			Email				
Client is not	0	0	ient is chronica	lly	Urgency Level	Not urgent			$\overline{}$
homeless	homeless	homel	ess		<i>.</i> ,				
Address1					Inquiry type	Request for servic	es/screening		~
Address2					Contact type	Call			~
City				Prie	ority Population				~
State	~	Zip		Coun	ty of Residence	Search here			
Presenting Pr	oblem				Current Client	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.

Clear ame Search	Include Client Co	ntacts 🗌 Only Incl	ude Activ	e Clients (Checking	will not allow o	ption to cre	ate new Client)
Broad Sear Last Name	ch Narrow Sear	ch Type of Client First Nar	-	idual 🔿 Organizati ual	on All Clier Program	nt Search	~
ther Search St	rategies						
SSN Searc DOB Searc Primary Clinic Authorizati	cian Search	99 9999 2002 📾 🕶	~	Phone # Search Master Client ID S Client ID Search Insured ID Search	Search		
cords Found							
ID Ma	ster ID Client Nam	e ∆ <u>Chosen Na</u>	<u>ame</u>	SSN/EIN DOB	<u>Status</u>	<u>City</u>	Primary Clinician
			No data t	o display			
							Þ

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

me Search Broad Searc	_	Client Contac ow Search	Type of Clien			-		otion to crea	ate new Client))
Last Name	Training	l .	First Na	me Mar	ual	Prog	gram			~
her Search St	rategies									
SSN Searc	h	999 9	9 9999		Phone #	Search				
DOB Searc		06/07/20				ent ID Search				
Primary Clini	ian Search			~	Client ID	Search				
Authorizati	on ID / #				Insured I) Search				
cords Found										
ID Ma	ster ID Cli	ent Name	△ Chosen N	lame	SSN/EIN	ODB S	tatus	City	Primary C	linician
								<u></u>	<u></u> ,	
				No data t	o 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 (C	hecking will r	not allow c	ption to create	e new Client)
	Broad	Search	Narrow Search	ype of Client 💿	Individual 🔿 O	rganization	All Clier	nt Search	
	Last Nam	ne Trai	ining	First Name	Manual	F	orogram		~
Oth	er Searc	h Strategi	es						
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	DOB	Search	06/07/2002		Master (lient ID Sear	ch		
	Primary	Clinician Sea	rch	~	Client I	D Search			
	Author	ization ID / #	±		Insured	ID Search			
Rec	ords Fou	u nd Master ID	Client Name △	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
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h. This will take you back to the Inquiry screen but now a client ID number will be added.

nquiry De	tails Guide Men	u		Remo	we Client Link	Link/Creat	e Client	Register (lient 🔅	i 🔩 🛅	₽[Save
Initial In	surance Demog	aphics										
Inquirer In	formation 🗌 Cris	iis										
Relation To Cl	ient Self	~	First Name	Manual		Middle Name			Last Name	Training		
Call Back	(916) 555-7878		Ext			Email						
Start Date	01/06/2023	гүш⇒	Start Time	5:16 PM	Now							
Client Info	ormation (Potenti	al)										
		,			_		h					
First Name	Manual	Middle Nam	ie		Last Name	Training		Client ID 1	239	Sex	Male	~
SSN	999999999	SSN Unk	nown/Refuse	ed	DOB	06/07/20	02 📋 -	Age (20 Yea	rs)	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell			Email							
Client is not homeless	Client is homeless	Cl homel	ient is chronica ess	lly	Urgency Leve	Not urgent	t					~
Address1					Inquiry type	Request fo	or services/s	creening				~
Address2					Contact type	Call						~
City				Pri	iority Population	n						~
State	~	Zip		Cour	nty of Residence	Search he	ere		<	•		
Presenting Pr	oblem				Current Clien	t Information ([If any)					
					Client Id: 12 Last Inquiry							
Client Can Le	gally Sign 🔿 Yes 🔿	No			Coverage His No Coverage							

- 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 Details	Remove Clie	nt Link Link/Create Clie	nt Register Client 🕵	i 🎝	<u> </u>	Save	×
Initial Insurance Demographics	S						
Electronic Eligibility Verification		a					
Payer 🗸 Insurar	nce Id Verify.						
Coverage Information 🔽 Show Cu	urrent Plans Only						
Plan	Insured ID	Group ID	Comment				
Plan	-	Group ID	Comment			Add	
	-	Group ID	Comment			Add	
Plan	-	Group ID	Comment			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.

nquiry Details	9		Remove Client Link Link/0	Create Client Register Client	🌣 i 🍄 i	🗊 🖨 🖬 Save
Initial Insurance	Demographics					
General Information						
Primary Care Coordinator		✓ Medical Provider	~	Professional Suffix		Active
Prefix		✓ Suffix	~			
Identifying Informatio	on					
Marital Status	~	Gender Identity	× •	Sexual Orientation		~
Marital Status Deceased On	✓	Gender Identity Cause of Death	~ 1a			~
		L	a		ovide	
Deceased On		Cause of Death Race Alaskan Na	tive 1	Pronoun	(

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 Li	nk Link/Create Client	Register Client	i ^₿ 🖻	Save
Initial Insurance Employment Information	Demographics						
Language Primary/Preferred Lang Interpreter Service	s Needed	~	Client does not sp	eak English Hispani	c Origin		~
Transportation Inf Transportation Ser Note any special needs	vice	wheelchair, service a	animal, high rise)				
Preferences			Makila Dhaa				
Communication Preference Days M Geographic Location Comment	□T □W □Th	F	Mobile Phon Provider	3	~		

- 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.

	ails Gu	uide Menu		Remove Client	Link Li	nk/Create Client	Register Clien	1 ¢	. 🖓 🗉		Save
Initial Insu	Irance	Demograph	nics							11	
UD	() Yes	() No	Not Evaluated	Client is se	eeking serv	ices					
			_		`	•					
njecting Drugs Pregnant	YesYes	O No	 Unknown Unknown 	Not Applic	cable						
Disposition											
Select Disp	position					~					
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		ude Follow l	Jp and Contact Infor	mation	Additio	onal Waitlist inform	ation				
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	ment - Incl	ude Follow L			Additio In Progress		ation)			

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)"

CalMHSASmartcareTrain ≡ SmartCare		
▲ <u>∎</u> ≡		
CR CANS Reporting Record Summa	S Inquiries (My Office) S Client Inquiries (Client)	-
		<u> </u>

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.

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SmartCare	÷	Q ★ 🚢										e (° D ?	Acces	s Staff 🔻
		Inquiries (162))										☆★.		:⊞†⊞
My Office	>												- 3		
Client	>	Recorded By All	~	Assig	ied To All	~	All Disposition	s	~	All Status	~	All Inquir		~	Apply Filter
		All Programs	~	All Lo	ations	×	All Urgency Le	vel	~	All Contact Ty	pe 🗸	All Priorit	y Population	~	
Program	>	From 01/01/1900	≓ −	To 12	31/9999 🛗 🕶		Last Name			First Name		Phone			
Administration	>		_												-
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ppointment Search	\otimes	Test, Registration	<u>1220</u>		Test, Regimenter		1/3/2023 1	0:13 AM	Rowe,	Charla				In Prog	ress
		Print, Series			Witness Horses		1/1/2023 1	0:53 AM	Clinicia	an, Robert				In Prog	ress
		Citheren, Yudger	<u>1217</u>		Collected, Turky	-	<u>12/30/2022</u>	2:06 PM	Willian	ns, LaQuita				In Prog	ress
		Chinese, Proc.	<u>1216</u>		Chinese, Proc.		<u>12/30/2022</u>	8:56 AM	Willian	ns, LaQuita				In Prog	ress
		Test, Rottanti	<u>1215</u>		Test, Rottanti		12/29/2022	3:21 PM	Staff, A	Access				In Prog	ress
		Test, Totaville	<u>1214</u>		Test, Totaville		12/29/2022	2:58 PM	Clinicia	an, Robert				Comple	ete
		100.00	<u>1213</u>		100.00		12/29/2022	12:04 PM	Fitzger	ald, John				In Prog	ress
		Roberts, Rosella	<u>1209</u>		Anderson, Arrenta		12/29/2022	8:25 AM	Staff, A	Access				In Prog	ress
		Sec. Sec.go	<u>1208</u>		Test, Decage		12/29/2022	8:17 AM	Rowe,	Charla				In Prog	ress
		Tant, Chris	<u>1207</u>		fam. Door		12/28/2022	5:02 PM	Rowe,	Charla	Clinician, Rober	t		In Prog	ress
		Bernyl, Yest	<u>1204</u>		Barrey, C. Tant		12/28/2022							Comple	
		Test, Statement	1206		fact, factoria		12/28/2022							In Prog	
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		and the second second	<u>1194</u> 1192		form fragme		<u>12/27/2022</u> 12/26/2022							Comple In Prod	
		Tax I may	1192		Section 1		12/26/2022							In Prog	_ (

- 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	E	No Search Recon	ds Found	
Name Search	In	clude Client Contac	ts 🗌 Only	Include Active Clients (Check
D 10				
Broad Sear	ch	Narrow Search	Type of Cl	ient 💽 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.

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 Last Name Training First Name Manual Program Image: Client Search Other Search Image: Client TD Search Image: Client TD Search Image: Client TD Search DOB Search Image: Client TD Search Image: Client TD Search Primary Clinician Search Image: Client TD Search Image: Client TD Search Authorization TD /# Image: Training, Manual 9999 Ob/07/20 Active	ent Search Clear									3
Last Name Training First Name Manual Program		h 🗌 Inclu	de Client Contacts	Only Include	Active Clients (0	hecking will r	ot allow o	ption to cr	reate new Clie	ent)
Other Search Strategies SSN Search DOB Search DOB Search Primary Clinician Search V Client ID Search Authorization ID / # Records Found ID Master ID Client Name A Chosen Name SSN/EIN DOB Status City Primary Clinician 1239 1239 Training, Manual 9999 06/07/20 Active	Broad S	earch I	Narrow Search	Type of Client 💿	Individual 🔿 C	rganization	All Clier	nt Search		
SSN Search Phone # Search Master Client ID Search Client ID Search Client ID Search Insured ID Search Secords Found SSN/EIN DOB Status City Primary Clinician (SSN/EIN CITY (SSN/EIN (SSN/EIN CITY (SSN/EIN (Last Name	e Trai	ining	First Name	Manual	F	rogram			~
DOB Search Primary Clinician Search Authorization ID / #	Other Search	n Strategi	es							
DOB Search Primary Clinician Search Authorization ID / #	SSN Se	earch			Phone	# Search				
Authorization ID / # Insured ID Search Records Found ID Master ID Client Name Chosen Name SSN/EIN DOB Status City Primary Clinician 1239 1239 Training, Manual 9999 06/07/20 Active	DOB Se	earch		iii ▼			ch			
Records Found ID Master ID Client Name Chosen Name SSN/EIN DOB Status City Primary Clinician 1239 1239 Training, Manual 9999 06/07/20 Active •	Primary C	linician Sea	rch	~	Client I	D Search				
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	1239	1239	Training, Manual		9999	06/07/20	Active			A
										-
	•								_	

- 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.

inquirer in	formation 🗌 Cris	is	- a					
Relation To Cli	ent Self		✓ First Name Mar	nual 🚽 Mid	dle Name	Last N	ame Training	
Call Back	(916) 555-7878		C	Em	ail			
Start Date	01/06/2023	Y 🖮	 Start Time 05: 	16 PM Now				
					·			
Client Info	rmation (Potenti	al)						
First Name	Manual	maater	Name	Last Name	Training	Client ID	Sex	Male 🗸
SSN		SSN	Unknown/Refused	DOB	06/07/2002	 Age (20 Years) 	Medi-Cal ID	
Home Phone	(916) 555-7878	Cell		Email				
Client is not	Client is homeless	h	Client is chronically omeless	Urgency Level 🔸				~
Address1				Inquiry type				~
Address2				Contact type 🔸				~
City				Priority Population				~
State	~	Zip		County of Residence	Search here			
	blem			Constant Olivert In	formation (If any)			

- 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.

nquiry Det	tails Guide Men	iu		R	emove Client Li	nk Link/Creat	te Client	Register Client	🌣 i 🍄	
Initial Ins	surance Demog	raphics								D
Inquirer Inf	formation 🗌 Cris	sis								
Relation To Clie	ent Self	~	First Name	Manual	٩	Middle Name		Last Na	me Training	
Call Back	(916) 555-7878	}	Ext		E	Email				
Start Date	01/06/2023	Т Ү 🛗	Start Time	7:16 PM	Now					
Client Infor	rmation (Potenti	ial)							_	
First Name	Manual	Middle Nam		ad	Last Name	Training	Client	a		Male 🗸
First Name	- Manual 999-99-9999	Middle Nam		ed	DOB	Training 01/01/1900	1	a	Sex Medi-Cal ID	Male 🗸
First Name SSN Home Phone Client is not	Manual	Middle Nam	nown/Refuse			01/01/1900	-	a		Male V
First Name SSN Home Phone Client is not homeless	Manual 999-99-9999 (916) 555-7878 Client is	Middle Nam	nown/Refuse		DOB Email	01/01/1900	-	a		
First Name SSN Home Phone Client is not homeless Address1	Manual 999-99-9999 (916) 555-7878 Client is	Middle Nam	nown/Refuse		DOB Email Urgency Level	01/01/1900	-	a		~
First Name SSN Home Phone Client is not homeless Address1 Address2	Manual 999-99-9999 (916) 555-7878 Client is	Middle Nam	nown/Refuse	illy	DOB Email Urgency Level Inquiry type	01/01/1900 L Emergent Crisis Call	-	a		~
First Name	Manual 999-99-9999 (916) 555-7878 Client is	Middle Nam	nown/Refuse	Illy Pri	DOB Email Urgency Level Inquiry type Contact type	01/01/1900 L Emergent Crisis Call	-	a		~ ~ ~

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	8
Clear	ient)
ame Search include client contacts only include Active clients (checking with not allow option to cleate new cl	lient)
Broad Search Narrow Search Type of Client Organization All Client Search	
Last Name Training First Name Manual Program	~
ther Search Strategies	
SSN Search 999 99 9999 Phone # Search	
DOB Search 06/07/2002	
Primary Clinician Search	
Authorization ID / # Insured ID Search	
ecords Found	
ID Master ID Client Name A Chosen Name SSN/EIN DOB Status City Prima	ry Clinician
No data to display	
	•
Select	Cancel

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

ent Search						
Clear	No Search Reco		ve Clients (Checking v	will not allow c	ption to cre	eate new Client)
Broad Searc		Type of Client O Ind		_	nt Search	
Last Name	Training	First Name Ma	inual	Program		~
ther Search Sti	rategies					
SSN Search	n 999	9999	Phone # Search			
DOB Search	h 06/07/20	002 🛗 🕶	Master Client ID S	Search		
Primary Clinici	ian Search	~	Client ID Search			
Authorizatio	n ID / #		Insured ID Searc	h		
ecords Found						
ID Mas	ter ID Client Name	△ <u>Chosen Name</u>	SSN/EIN DOB	Status	<u>City</u>	Primary Clinician
		No data	to display			
			1 2			
						elect Cancel
					5	Create New Client Reco

- 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."

				_ Only Include	Active Clients (C	hecking will	not allow o	ption to creat	e new Client)
	Broad	Search	Narrow Search Ty	pe of Client 💿	Individual 🔾 0	rganization	All Clier	nt Search	
	Last Nam	e Tra	ining	First Name	Manual	F	Program		~
Oth	er Searc	h Strategi	es						
	SSN S	Search	999 99	9999	Phone #	# Search			
	DOBS	Search	06/07/2002	iii) -		lient ID Sear	ch		
	Primary	Clinician Sea		- •		D Search			
		ization ID / #				ID Search			
Rec	ords Fou	Ind Master ID	Client Name 🛛 🛆	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
							Active		
0	1234	1234	Applies Products		9999	08/29/19			
0	1234 1 e	1234 1081	Aprile Patrick -		9999	08/29/19			
0			Agelar Padris, - Roberts, Rat Roberts, Rat				Active		
0 0 0	1 e	1081	Againe Hadron, - Rodenan, Hine Rodenan, Kan Rashin, Yan		9999	09/17/19	Active Active	heavyton	
	1 e 1072	1081 1072	Agala Nativa - Antanan, Alan Antanan, Nati Anativa, Nati Anativa, Nati		9999 9999	09/17/19 03/03/19	Active Active Active	heavyton	Clinician, Robert
	1 e 1072 1209	1081 1072 1209	Agata Nativa - Antenen, Mari Antenen, Nati Antenen, Nati Antene, Nati Antene, Nati		9999 9999 9999	09/17/19 03/03/19 10/10/19	Active Active Active Active	heavyton Test	Clinician, Robert

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

Client Info	ormation <mark>(P</mark> otenti	al)			1			
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					
_ <u></u>								

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	Male	~
SSN	999-99-9999	SSN Unkno	wn/Refused		DOB	06/07/2002	 Age (20 Years) 	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell		8	Email					
Client is not homeless	Client is homeless	Clien	t is chronically		Urgency Level	Emergent				~
Address1					Inquiry type	Crisis				~
Address2					Contact type	Call				~
City				Prio	rity Population					×
State	~	Zip		Count	y of Residence	Search here				
Presenting Pr	oblem				Current Client In	nformation (If any)				
	gally Sign () Yes ()				Client Id: 1239 Last Inquiry Da Coverage Histor No Coverage Hi	te: 01/06/23 ry				

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?

Inquiry	Details	Guide Menu		
Initial	Insurance	Demograp	nics Crisis	
Inquire	r Informat	ion 🗹 Crisis		
			9	

- 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.

Inquiry	y Details	5		Remove Client Link	Link/Create Client Regist	ter Client 🔅 🖧 🗑	🖥 🖶 🖬 Save 🗙
Initial	Insuran	ce Demographics	Crisis				C
Servio	e Informa	ation					a
	Program Clinician	SUD Screening Staff, Access	~	Procedure C Location	Code Crisis Intervention Se	ervices, per 15 min 🗸 V	
	Start Date	01/06/2023	Start Time	6:53 PM	End Time		
Note	Open Ser	vice Note					
Nar	ration		b				
Clie	nt called repo	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.

Inquiry Deta	ails Guide Menu		Remove Client Link	Link/Create Client	Register Client 🔅	i 🍄 i	
Initial Insu	urance Demograp	phics Crisis					11
SUD	() Yes () No	Not Evaluated	Client is seeking serv				*
Injecting Drugs	◯ Yes ◯ No	Unknown	```				
Pregnant	🔵 Yes 💿 No	Unknown	Not Applicable				
Disposition							
Select Dis	position			~			
s	elect Service Type				~		
	Select Provider/A	Agency			~		
Ar	Add Provider dd Service Type						
Assigned			٩	Assigned WorkGroup)		~
Disp	osition Comments						
Add Dispo	sition						
Screening Com	ment - Include Follow	Up and Contact Inform	ation Additio	onal Waitlist informati	on		
					10		
End Date 01/0	6/2023 TY 🛗 🕇	End Time 08:03 PM	Now Status Complete		~		?

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

nquiry Details	Remove 0	Client Link Link/Creat	e Client Register	Client 🏟 i 🍄	前 🖶 🖬 Save
Initial Insurance Demographics	Crisis				
Service Information					
Program SUD Screening	~	Procedure Code	Crisis Intervention S	ervices, per 15 min 🗸	
Clinician Staff, Access		Location	Telehealth	~	
Start Date 01/06/2023 🛗 🕶	Start Time 6:53	3 PM	End Time	7:11 PM	
13 Note Open Service Note					
Narration					
Client called reporting					

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.

Effective 01/06/202	Status To Do	Author Staff, Acc	cess 01/06	/2023	00		Sign 📀	-
Service Note E	Billing Diagnosis Warnings Dispo	sition						
Service								
Status	Show 🗸		Start Date	01/06/202	23 🛗 🕶			
Program	SUD Screening 🗸		Start Time	6:53 PM				
Procedure	Crisis Intervention Services, per 15 mi $m{ imes}$	Modifier	Travel Time		Minutes			
Location	Telehealth 🗸		Face to Face Time		Minutes			
Clinician	Staff, Access		Documentation Time		Minutes			
Mode Of Delivery	~		Total Duration	18	Minutes			
Cancel Reason	~	а	Attending			~		
Clinician Mode Of Delivery Cancel Reason	~	a	Total Duration			~		

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

Misc Note	: 20
Effective 01/06/202	Author Staff
Service Note Billing Diagnosis Warnings Dispo	sition
Narrative	

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	Author Staff, Access 01/06/2023	Sign 🕑 🚮 🕇
Service Note Billing Diagnosis Warnings	Disposition	0
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)
D	Z60.0*	Yes	162318009	Phase of life problem	Life crisis, life event (finding)
)	Z60.0*	Yes	266965008	Phase of life problem	Retirement problems (finding)
D	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
\supset	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.

DOM 5 (TOD 40				
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)
Z60.0*	Yes	41982003	Phase of life problem Phase of life problem	Male climacteric (finding) Difficulty managing andropause (finding)

- 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.

01/06/2023	Sign 🛛 🖍 🕂
	ICD 10

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	Q ★ ▲
▲ <u>∎</u> ≔	
CR CANS Reporting Record Summa	S Inquiries (My Office)
CANS Reporting Record Summa 2	S Client Inquiries (Client)
	() Manlagarana All Marketeaura

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

		.smartcarenet.com/CalM martcareTrain 09-21-202		Itcarein	ain, baser ages, Appi	cativ	on.aspx: desci	u=200time	=01/00	72023333000	Loadron ostback-				* 🗆 😫
SmartCare		Q ★ 🛔										-	P 🔊 ?	Acce	ss Staff 🔻
	≣	Ter en linite e (4 (0)	\												×⊞⁺⊞
	=	Inquiries (162))											<u> </u>	
1 My Office	>												3		
Client	>	Recorded By All	~	Assign	ied To All	~	All Dispositio	ons	~	All Status	~	All Inqui	гу Туре	~	Apply Filter
Program	>	All Programs	~	All Loc	ations	~	All Urgency I	.evel	~	All Contact Ty	rpe 🗸	All Priori	ty Population	~	
		From 01/01/1900	iii -	To 12/	31/9999 🛗 🕶		Last Name			First Name		Phone			
Administration	>														
SmartLinks		Client (Potential)	Client	Id	Inquirer		Start Date			ded By	Assigned To	Dis	position		ry Status
		Print, Strip	<u>1223</u>		The second		1/4/2023			an, Robert				In Pro	-
opointment Search	0	fan, Regeration	<u>1220</u>		fact, Registration		1/3/2023			Charla				In Pro	-
							-	10:53 AM						In Pro	
		Contraction of Articleum	<u>1217</u>		Contraction in the state	-				ns, LaQuita				In Pro	
		Chiefe, New	<u>1216</u>		Chiefe Street					ns, LaQuita				In Pro	-
		Test, Rottanti	<u>1215</u>		Test, Bulland			22 3:21 PM						In Pro	-
		Test, Transme	<u>1214</u>		Test, Toppende			22 2:58 PM						Compl	
		100.00	<u>1213</u>			۰.	12/29/202							In Pro	-
		Augence, Angela	<u>1209</u>		Automatica, Arriente			2 8:25 AM						In Pro	
		fact, factoge	<u>1208</u>		fan, fan ge			2 8:17 AM						In Pro	
		Tana, China	<u>1207</u>		Tana, China			22 5:02 PM			Clinician, Rober	t		In Pro	
		Bernyl, Ser	<u>1204</u>		Barrey, C. Tant			22 2:37 PM						Compl	
		Test, Sectors	<u>1206</u>		fact, Sectors			2 12:55 PM						In Pro	-
		California, Sta	<u>1203</u>		Castoria, Str.					ns, LaQuita				In Pro	
		fan, henrige	1201		fact, factoring		12/27/202	2 4:10 PM	Clinicia	an, Robert				In Pro	gress
		second encode	<u>1200</u>		second encode	۰.	12/27/202	2 4:01 PM	Fitzger	rald, John				In Pro	gress
		Harry, Taat	<u>1196</u>		Harry, Taur			2 1:44 PM						In Pro	-
		Public, Narry			Parties, Party			2 1:27 PM						In Pro	
		hadren and the second	<u>1195</u>		pressources, and			2 1:18 PM			Sullivan, Kevin			In Pro	
		factor, Register	<u>1194</u>		farm, fragmer		12/27/202	2 1:12 PM	Staff, /	Access				Compl	
		Roberts, Colly	<u>1192</u>		Roberts, Colly		12/26/202	2 9:49 PM	Willian	ns, LaQuita				In Pro	gres 🤈
		Tage Comp.	1190		Test Comp.		12/23/203	2 4:13 PM	Rowe.	Charla				Compl	ete

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)".

Client Search			? ×
Clear			
Name Search Include Client Contacts	Only Include Active Clients (Checking will r	not allow option to create	e new Client)
Broad Search Narrow Search Type	of Client 💽 Individual 🔵 Organization	All Client Search	
Last Name	First Name F	Program	~
Other Search Strategies			
SSN Search	Phone # Search		
DOB Search		ch	
Primary Clinician Search	✓ Client ID Search		
Authorization ID / #	Insured ID Search		
Records Found			
ID Master ID Client Name \triangle Ch	hosen Name SSN/EIN DOB	Status City	Primary Clinician
			<u>^</u>
	No data to display		
			-
4			
		Sele	
			Inquiry (New Client)

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 option to create new Client)
Broad Search Narrow Search Type of Client • Individual Organization All Client Search
Last Name First Name Program V
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 \triangle Chosen Name SSN/EIN DOB Status City Primary Clinician
Î.
No data to display
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	Manual	Mic	dle Name		Last Name	Training		
Call Back	(916) <u>555-7878</u>		Ext		a Em	ail					
Start Date	01/06/2023	Г Ү 🛗 🕶	Start Time	05:16 PM	Now						
Client Info	rmation (Potenti	al)									
First Name	Manual	Middle Nam	e		Last Name	Training	Client ID		Sex	Male	~
SN		SSN Unk		d	DOB	06/07/2002	🛗 🔻 Age (20 Year	s) I	Medi-Cal ID		
Iome Phone	(916) 555-7878	Cell			Email						
Client is not omeless	Client is homeless	Cli homel	ent is chronical ess	lγ	Urgency Level 🚽	,					~
Address1					Inquiry type						~
Address2					Contact type 👎						~
				Pri	ority Population						~
City	~	Zip		Coun	ty of Residence	Search here		<	•		
State	•										

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 Type	~	Referral Subtype	~	
Organization Name			Phone		
First Name			Last Name		
Address Line 1			Address 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 "9999999999", 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.

			F							
Relation To Cl		~	First Name	Manual		iddle Name	Last Na	me Training		
Call Back	(916) 555-7878	3	Ext		Er	mail				
Start Date	01/06/2023	түшіт	Start Time	05:16 PM	Now					
		·								
Client Info	rmation (Potent	ial)								_
First Name	Manual	Middle Nam	ie		Last Name	Training	Client ID	Sex	Male	v
SSN		SSN Unk	nown/Refuse	ed	DOB	06/07/2002	🛉 🔻 Age (20 Years)	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell			Email					
Client is not	Client is		ient is chronica	lly	Urgency Level	Not urgent				$\overline{}$
homeless	homeless	homel	ess							=
Address1					Inquiry type	Request for servi	ces/screening			~
Address2					Contact type	Call				~
City				Pric	ority Population					~
State	~	Zip		Count	y of Residence	Search here				
Presenting Pro	hlam				Current Client I	nformation (If any				

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.

Clear 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 ast Name Training First Name Manual Program Individual Organization All Client Search Other Search 06/07/2002 Image: Client ID Search	Client Search	? E
Broad Search Narrow Search Type of Client Individual Organization All Client Search Itast Name Training First Name Manual Program ~ Other Search Strategies Image: SSN Search 999 999 99 999 99 Phone # Search DOB Search 06/07/2002 Image: Primary Clinician Search Image: Primary Clinici	Clear	
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Create New Client Record		ord

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

nt Search						
Clear	😵 No Search Rec	ords Found				
ame Search	Include Client Cont	acts 🗌 Only Include Active	Clients (Checking	will not allow o	ption to cr	eate new Client)
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Authorizatio	on ID / #		Insured ID Searc	h		
cords Found						
<u>ID</u> <u>Ma</u>	ster ID Client Name	△ <u>Chosen Name</u>	SSN/EIN DOB	<u>Status</u>	<u>City</u>	Primary Clinician
		No data t	aispiay			
					S	elect Cance

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."

									e new Client)
	Broad S	Search	Narrow Search T	ype of Client 💿	Individual 🔵 0	rganization	All Clie	nt Search	
	Last Nam	e Tra	ining	First Name	Manual	P	rogram		~
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Rec				Chosen Name	Insured SSN/EIN		Status	<u>City</u>	Primary Clinician
Rec	ords Fou	ınd		Chosen Name				<u>City</u>	Primary Clinician
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	ID 1234 1 C	Ind Master ID 1234 1081		<u>Chosen Name</u>	<u>SSN/EIN</u> 9999 9999	DOB 08/29/19 09/17/19	Active Active Active	<u>City</u> heavyton	Primary Clinician
	ords Fou ID 1234 1 C 1072	Master ID 1234 1081 1072		<u>Chosen Name</u>	SSN/EIN 9999 9999 9999 9999	DOB 08/29/19 09/17/19 03/03/19	Active Active Active Active		Primary Clinician
	ords Fou 1234 1 0 1072 1209	Master ID 1234 1081 1072 1209		Chosen Name	SSN/EIN 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.

nquiry De	tails Guide Men	IJ		Remo	ve Client Link	Link/Creat	te Client	Register C	lient 🏚	i 🍄 🛍	i 🖶 🛛	Save
Initial In	surance Demogr	aphics										
Inquirer In	formation 🗌 Cris	is										
Relation To Cli	ient Self	~	First Name	Manual		Middle Name			Last Name	Training		
Call Back	(916) 555-7878		Ext			Email						
Start Date	01/06/2023	Γ Y ⊞ -	Start Time	5:16 PM	Now							
Client Info	rmation (Potenti	al)										
					1		h	<u> </u>				
First Name	Manual	Middle Nam	ie		Last Name	Training		Client ID 1	239	Sex	Male	~
SSN	999999999	SSN Unk	nown/Refuse	d	DOB	06/07/20	002 📋 🕇	Age (20 Year	rs)	Medi-Cal II	0	
Home Phone	(916) 555-7878	Cell			Email							
Client is not homeless	O Client is homeless	Cl homel	ient is chronica ess	lly	Urgency Lev	el Not urgen	ıt					~
Address1					Inquiry type	Request f	or services/	screening				~
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City				Pri	iority Populatio	n						~
State	~	Zip		Coun	nty of Residenc	e Search h	ere		<	•		
Presenting Pro	oblem				Current Clier	nt Information	(If any)					
					Client Id: 1 Last Inquiry Coverage Hi	Date:						
Client Can Leg	gally Sign 🔿 Yes 🔿	No			No Coverage Hi							

- 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.

nquiry Details	Remove Clien	t Link Link/Create Clie	ent Register Client 🔅	i 🍄 🛅	Save	×
Initial Insurance Demographic	<u>s</u>					
Electronic Eligibility Verification		a				
Payer 🗸 Insura	nce Id Verify					
Coverage Information 🗹 Show C	urrent Plans Only					
Plan	Insured ID	Group ID	Comment			
					Add	
Coverage Information						

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.

nquiry Details	9		Remove Client Link	Link/Create Clie	nt Register Client	🌣 i 🖓	±	Save	×
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General Informatio	on								^
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Prefix		✓ Suffix		~					
Identifying Inform									
Marital Status	~	Gender Identity	~	Sexu	al Orientation		~		
Deceased On	iii ▼	Cause of Death	~	Pron	oun		~		
Ethnicity		Race			Client declined to pro	ovide			
Amerasian American Native Asian Indian Black		Asian	indian Indian and Alaskan Native		Date of Birth Ethnicity Gender Identity Hispanic Origin				
Cambodian	•	☐ Acian India	an .	Ť	Priman//Proform	and Landuada	*		

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 Detai	ls			Remove Client L	ink Link/Crea	te Client	Register Client	\$ A₿	ā 8	Save
Initial Insura Employment Information	ance Demographic	S								
Language Primary/Preferred Interpreter Se	Language ervices Needed		• .	Client does not sy	beak English	Hispanic Ori	gin			
Transportation Transportatio Note any special n		(e.g. wheelchair, se	rvice animal, higi	h rise)						
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Preference	_M _T _W [▼]Th □F		Provider	e		~			
										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.

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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.

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My Office >	-	,								3			
Client >		~	Assigned To All	~	All Dispositions		 All Status 	~	All Inq	uiry Type	~ A	pply Filte	er
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Program >	From 01/01/1900	≕ -	To 12/31/9999 🛗 🕶		Last Name		First Name		Phone				
Administration	_												-
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	o observations the state of the	Calutions	SmartCare CalMHSASma								602022011		

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 Iame 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 Last Name First Name Program ✓
)ther Search Strategies
SSN Search DOB Search Primary Clinician Search V Client ID Search
Authorization ID / # Insured ID Search Records Found Insured ID Search
ID Master ID Client Name △ Chosen Name SSN/EIN DOB Status City. Primary Clinician
No data to display
Select Cance Inquiry (New Clier)

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 option to create new Client)
Broad Search Narrow Search Type of Client Individual Organization All Client 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
i i i
No data to display
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.

	formation 🗌 Cris	is 🛛	a								_
Relation To Cli	ent Self	v	First Name	Manual	Mide	dle Name		Las	t Name Training		
Call Back	(916) 555-7878		Ext		Ema	il					
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					_						
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First Name	Manual 👍	moute Nam	20		Last Name	Training	Clier	nt ID	Sex	Male 💊	,
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Home Phone	(916) 555-7878	Cell			Email						
Client is not	Client is homeless	C Cl	lient is chronically less	t	Urgency Level 🔸					~	
Address1					Inquiry type					~	
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				Prie	ority Population					~	•
City				Cours	ty of Residence	Search here			٠		
City State	~	Zip									

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.

	nformation 🗌 Cris	sis								
Relation To C	lient Self	~	First Name	Manual	1	Middle Name		Last Nam	ne Training	
Call Back	(916) 555-7878	3	Ext		E	Email				
Start Date	01/06/2023	түшіт	Start Time	05:16 PM	Now					
Client Infe	ormation (Potenti	(In								
Client Ind	ormation (Fotenti	at)								
First Name	Manual	Middle Nam	1e		Last Name	Training	Client II)	Sex	Male 🗸
SSN		SSN Unk	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>	<u> </u>	ient is chronica	lly	Urgency Leve	l Not urgent				~
homeless	homeless	homel	ess							
Address1					Inquiry type		vices/screening			~
Address2					Contact type	Call				~
City				Pric	ority Population					~
State	~	Zip		Count	ty of Residence				₫	
Presenting Pr	oblem				Current Client	Information (If an	iy)			

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.

	7			
Remove Client L	Link Link/Create Client	Register Client 🔅	i 🕹 🛅 🗄	Save

- 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							?
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lame Search	Include Client Cont	acts 🗌 Only Include	Active Clients (Checking	will not allow o	ption to cre	ate new Client)	
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c. If no records are found based on the search you do, an alert will show at the top of the window.

nt Search						
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		No da	ta to display			
						Select Cancel

- 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	Narrow Search	ype of Client 💿	Individual 🔿 O	rganization	All Clie	nt Search	
	Last Name	Tra	ning	First Name	Manual	F	Program		~
Oth	er Search	n Strategi	es						
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Rec	ords Fou	nd <u>Master ID</u>	Client Name A	Chosen Name	SSN/EIN	DOB	<u>Status</u>	<u>City</u>	Primary Clinician
Rec			<u>Client Name</u> △	Chosen Name	<u>SSN/EIN</u> 9999	DOB 08/29/19		<u>City</u>	Primary Clinician
	ID	Master ID	<u>Client Name</u> ∆	<u>Chosen Name</u>			Active	<u>City</u>	<u>Primary Clinician</u>
	<u>ID</u> 1234	<u>Master ID</u> 1234	<u>Client Name</u> △	<u>Chosen Name</u>	9999	08/29/19	Active Active	<u>City</u>	Primary Clinician
	<u>ID</u> 1234 1 e	<u>Master ID</u> 1234 1081	<u>Client Name</u> △	<u>Chosen Name</u>	9999 9999	08/29/19	Active Active Active	<u>City</u> heavyton	Primary Clinician
	ID 1234 1 C 1072	<u>Master ID</u> 1234 1081 1072	<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
	ID 1234 1 C 1072 1209	Master ID 1234 1081 1072 1209	<u>Client Name</u> △	<u>Chosen Name</u>	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.

Inquirer In	oformation 🗌 Cris	is									
Relation To Cl	ient Self	~	First Name	Manual	M	iddle Name		Last Name	e Training		
Call Back	(916) 555-7878		Ext		E	mail					
Start Date	01/06/2023	Y ⊞ -	Start Time	5:16 PM	Now						
Client Info	ormation (Potenti	al)					h				
First Name	Manual	Middle Nam	e		Last Name	Training	Client ID	<u>1239</u>	Sex	Male	、
SSN	999999999	SSN Unk	nown/Refuse	d	DOB	06/07/2002	🗎 🕆 Age (20 Y	ears)	Medi-Cal ID		
Home Phone	(916) 555-7878	Cell			Email						
Client is not	Client is homeless	Cl homel	ient is chronical ess	lly	Urgency Level	Not urgent					~
Address1					Inquiry type	Request for se	ervices/screening				~
Address2					Contact type	Call					~
Dity				Pri	ority Population						~
State	~	Zip		Coun	ty of Residence	Search here			◆		
Presenting Pro	oblem				Current Client	Information (If a	ny)				

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 Detail	s 8	Remove Client Link	Link/Create Client	Register Client 🔅	i 🍄	ē €	Save	×
Initial Insurar								
Electronic Eligi	bility Verification	a						
Payer	✓ Insurance Id	Verify						
-								
Coverage Infor	mation 🗹 Show Current Plans Only							
Plan		Insured ID	Group ID	Comment				
							Add	
Course to Informati								
Coverage Information	on							
Coverage Informati	ion							

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.

Initial Insurance De	mographics					
eneral Information						
Primary Care Coordinator		✓ Medical Provider	•	 Professional S 	uffix	Active
		✓ Suffix		~		
dentifying Information	~	Suffix Gender Identity		Sexual Orientatio	n	~
dentifying Information	× ₩ ▼		~		n	~
dentifying Information larital Status eceased On		Gender Identity		a Sexual Orientatio Pronoun	n	-
Prefix Identifying Information flarital Status Jeceased On thnicity American Native		Gender Identity Cause of Death	v v tive	a Sexual Orientatio Pronoun Client der	clined to provide of Birth	-

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.

Inquiry Details	Remove Client Link /Create Client Register Client	i 🐣 🛅 🖨 🖬 Save							
Initial Insurance Demographics Employment Information									
Language b Primary/Preferred Language Client does not speak English Hispanic Origin Interpreter Services Needed 									
Transportation Information Transportation Service Note any special needs accommodations (e.g. wheelchair, service an	nimal, high rise)								
Preferences Communication Preference Days M T W Th F Geographic	Mobile Phone 🗸 🗸								
Location Comment		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.

	rance	Demograp	nics											11		
SUD	() Yes	() No		Evaluated		Client is s	eeking se	ervices						_		
								~								
njecting Drugs	O Yes	⊖ No	O Uni	nown												
Pregnant	Yes	🔘 No	🔵 Uni	known	0	Not Appl	icable									
Disposition																
Select Disp	osition								~							
Se	elect Servi	се Туре								~						
	Sel	ect Provider/A	gency								~					
		Provider	,													
Ad	d Service	Type														
Ad Assigned S		<u>lype</u>						Ass	signed Work	Group					~	
Assigned S							٩	Ass	signed Work	Group					~	
Assigned S	Staff						₫	Ass	signed Work	Group					~	
Assigned S	Staff						₫	Ass	signed Work	Group					~	
Assigned S	Staff osition Co							Ase	signed Worki	Group					~	
Assigned S Dispo Add Dispos	Staff osition Co sition	mments	Jp and Co	ntact Inforr	nation				aitlist infor						~	
Assigned S Dispo Add Dispos	Staff osition Co sition	mments	Jp and Co	ntact Inforr	nation										~	
Assigned S Dispo	Staff osition Co sition	mments	Jp and Co	ntact Inform	nation										~	
Assigned S Dispo Add Dispos	Staff osition Co sition	mments	Jp and Co	ntact Inforr	nation										~	
Assigned S Dispo Add Dispos	Staff osition Co sition	mments	Jp and Co	ntact Inforn	nation						10				~	

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)"



- 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. HSA Specialty Mental Health Services Clinical Documentation User Guide

	careTrain 09-21-202	_	ncarerra	n/baserages/App	iicati	on.aspx?&scld=28&tir	10=01/0	o/202353308(L	.oauForPostBack		•• • • •• • •		s Staff
🗄 🗄 Ind	quiries (162)										☆★ 🕹	. 🗅 🕻	×⊞†e
Office >													
	Recorded By All	~	Assigne	d To All	~	All Dispositions	~	All Status	~	All Inquir	у Туре	~	Apply Fi
	All Programs	~	All Loca	tions	~	All Urgency Level	~	All Contact Ty	pe 🗸	All Priorit	y Population	~	
ogram >	rom 01/01/1900	⇒ -	To 12/3	31/9999 🛗 🕶		Last Name		First Name		Phone			
ministration >][
C	lient (Potential)	Client	Id	Inquirer		Start Date/Time 🕏	Reco	rded By	Assigned To	Disp	osition	Inqui	ry Status
artLinks	line, der so	<u>1223</u>		Non-Area		1/4/2023 10:30 AM		ian, Robert				In Prog	gress
nent Search 🛛 🛇	e, bageration	<u>1220</u>		Int, Reports		1/3/2023 10:13 AM	4	Charla				In Prog	gress
	tan, Arran			Film, Aven		1/1/2023 10:53 AM	Curric	ian, Robert				In Prog	gress
	Chevrol, Tyrliger	<u>1217</u>		Collected, Turky	-	12/30/2022 2:06 P	1 Willia	ms, LaQuita				In Prog	gress
	Sang, Page	<u>1216</u>		Charles Prod		12/30/2022 8:56 A	1 Willia	ms, LaQuita				In Prog	gress
	er, Rotanti	<u>1215</u>		Test, Robert		12/29/2022 3:21 P	<u>1</u> Staff,	Access				In Prog	gress
	an, Transition	1214		fact, frames		12/29/2022 2:58 P	1 Clinic	ian, Robert				Compl	ete
		<u>1213</u>		100.00		12/29/2022 12:04	Ph Fitzge	erald, John				In Prog	gress
	dense, franks	<u>1209</u>		Anderson, Armania		12/29/2022 8:25 A	<u>4</u> Staff,	Access				In Prog	gress
	e, lange	<u>1208</u>		he, he ge		12/29/2022 8:17 A	1 Rowe	, Charla				In Prog	gress
	at, Dea	<u>1207</u>		fact, the to		12/28/2022 5:02 P	1 Rowe	, Charla	Clinician, Rober	t		In Prog	gress
	enqui, fast	<u>1204</u>		Bernyl, Test		12/28/2022 2:37 P	<u>4</u> Baize,	, Jacob				Compl	ete
	at, instru	<u>1206</u>		fast, Institut		12/28/2022 12:55	Ph Clinic	ian, Robert				In Prog	gress
	anna, Tai	<u>1203</u>		Cattorna, Bar		12/28/2022 8:44 A	1 Willia	ms, LaQuita				In Prog	gress
	e, beerst	<u>1201</u>		fast, lawareadt		12/27/2022 4:10 P	1 Clinic	ian, Robert				In Prog	gress
	COURSE, MICHAEL	<u>1200</u>		ACCESS, NO. 1	6	12/27/2022 4:01 P	<u>1</u> Fitzge	erald, John				In Prog	gress
	ann, faar	<u>1196</u>		Rent, Test		12/27/2022 1:44 P	1 Sulliv	an, Kevin				In Prog	gress
	utile, Marty			Posta, Party		12/27/2022 1:27 P	1 Sulliv	an, Kevin				In Prog	gress
	REAL PROPERTY AND	<u>1195</u>		press and the second		12/27/2022 1:18 P	<u>1</u> Fitzge	rald, John	Sullivan, Kevin			In Prop	gress
	eres, Regular	<u>1194</u>		farm, Replac		<u>12/27/2022 1:12 P</u>	<u>4</u> Staff,	Access				Compl	ete
	daris, Cala	<u>1192</u>		Roberts, College		12/26/2022 9:49 P	4 Willia	ms, LaQuita				In Prog	gres
		1190				12/23/2022 4:13 P		Charla				Compl	oto

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.

nquiry Details		Remove Client Link	Link/Create Client	Register Client	i 🍄
Initial Insurance Demogr	aphics				
Inquiry Handled By					
Recorded By Charla Rowe	\checkmark	Information Gathered By	Charla Rowe		~
Program	~	Gathered By Other			

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?

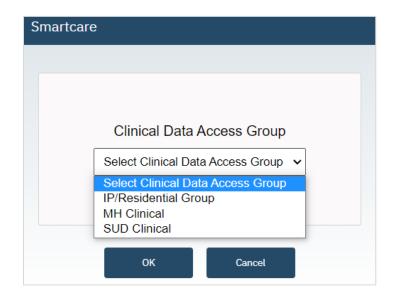
Your System Administrator will set up your CDAG and which programs you are able to see. CalMHSA recommends three basic CDAG options:

- 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 Confidential Information

In this section, we will cover the Coordinated Care Consent, which allows sharing amongst SmartCare users, and the Release of Information, also known as an Authorization to Disclose Confidential Information, which allows sharing with non-SmartCare users.

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.

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

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

oordinated Care (Consei	nt	6				🖻 : 🎝 I	🗿 😫 GOTO 💄 (\$, to 🖶 🗅	Save
Effective 01/16/20	Status	New	$\overline{}$	Author	Rowe, Charla	~	01/09/2023	00	Sign	
General										i
General										
By signing this form below your treatment and care. Authority called SmartCar	They will b		ertain organizati	ons and individ	uals to use and	share you		ersonal informatio		
1. Who will share my info By signing, your informati			l by and with any	of the followir	ng that provide s	ervices to	you ("your provide	rs") and which are	connected to Sma	artCare:
Health care providers, s Mental health providers School-based providers	and subst , such as n	ance us iurses, s	e disorder provi	ders.						
 California county health Housing providers, that Any jails or prisons that Any child welfare agenciation 	is, nonpro provides s	fits that ervices	to you while you	i're incarcerate						
Your providers also includ	de any hea	lth insu	rers that provide	you with cove	rage (see attach	ed for list)	, including any of y	our mental health p	olans.	
2. Will my providers be al No, your providers can on behavioral health care, to	nly use and	l share y	our information	for limited pur	poses. Your prov					edical or
3. What types of informat Your providers may share										
Medical information, su Behavioral health inform substance use history and	nation, suc	ch as an	y mental health	conditions or a						our
School services informa Housing service informa Incarceration informatic Child welfare records, in	ation maint	tained ir ıg, if you	n a Homeless Ma I are incarcerate	inagement Info d, when you ar	ormation System e scheduled to b	, which de	escribes services pr			ies.
4. Can I obtain a list of pro Yes, can obtain a list of pro	oviders wh	no saw n	ny information?			atopting [(Sounty contact info	1		?

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.

irst Name	Manual			Last Name	Training
ate Of Birth	06/07/2002			Email	
ontact		~		Relation	~
Phone Numbers				Addresses	i
		DNC 🚯	DNLM 🚺	Home 🔽	
Home 🔽 (916	5) 555-7878				
Business 🔽					
				Billing	
Business 2 💌					

- 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

- 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
		a
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
the restriction of the	s data as specified in the text.	

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.

Restricted Staff						
b×	Clinician, Robert					
×	Staff, Nurse					
	restrictions of sharing my data s data as specified in the text.	a. This will prompt a revi	ew by the CalMHSASmartcar	eTrain 09-21-2022 Priv	vacy Officer. This does not g	juarante

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.

icted Staff					
×	Clinician, Robert				
×	Staff, Nurse				
s on any other r	statt, Nurse restrictions of sharing my data. T	This will prompt a reviev	by the CaIMHSASmartcareT	rain 09-21-2022 Privacy	Officer. This does

11. Click Sign.

₽:	🎝 🖄 😫 Goto 🚢	🕹 🛅 🖶 🗋 🖬 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.

₽:	🏖 🖄 \varTheta GoTo 🚢 🤹	i 🖬 🖶 🗅 🖬 Save 🗙
01/09/2023	00	Sign 📝 🗲 i

- 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>	2 1.01/16/2023 (1)	Add Signer(s) Co-Sign	V (X 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 in a document to the client's chart?
 - 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	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.

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 consent for sharing	of info	rmation across all servio	es within the CalMH	SASmartcareTrain 0)9-21-2022 behavio	oral health network.	• Yes O No
Start Date 01/16/2023	.	Expiration Date	 .				

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).



- 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	4
MH Screening-10/03/2022	v
OK Cancel	

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	ntification of Person(s)	authorized t	to receive/ ma	ke the requested	use or disclosure:	
Organization/Provider	• Contact Open Co	ontacts	Type 🔽 Re	lease To 🛛 🔽 Ol		
Release To/From	Training, Spouse	~			6	
Contact Type		~				
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 From	Release To/Release	From	
	d to rece	Name or Other Specific Ide	ntification of Person(s) authorized to
Organization/Provider Ocontact Open Contacts	Туре	Organization/Provider	• Contact Open Contacts
Release To/From	~	Release To/From	Training, Spouse 🗸
Contact Type Training, Spouse		Contact Type	~
Organization		Organization	
Name		Name	Training, Spouse
Address		Address	123 Oak Street
City	State	City	Sacramento
Phone	Fax I	Phone	(916) 555-9999

 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 Fi	rom				
Name or Other Specific Ident	ification of Person(s) authorized	to receive/ ma	ke the requested use o	or disclosure:	
• Organization/Provider	Contact Open Contacts	Type 🗌 Re	lease To 🗌 Obtain F	rom	
Release To/From					
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 From					
Name or Other Specific Identification	of Person(s) authori	receive/ mak	e the requested use	e or disclosure:	
Organization/Provider Ocontac	Open Contacts	Type 🗌 Rele	ease To 🗌 Obtair	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		7
Quality Improvement Treatment/Care Coordination	Health insurance reimburse	ement
Expiration If nothing marked - one(1) year from date signed		8
☐ 1 time disclosure 6 month Start Date 01/16/2023 ➡ ▼ End Date	s End of Agency Treatr	nent
Information to be Used or Disclosed The information that can be disclosed under this auth ROI Type General V	orization includes the following, if available	9
All records Intake/Admission Information Medications Prescribed Screening Assessment(s) Progress Notes Other	Acknowledgement of Treatment Psychological Evaluation(s) Reports Discharge Summary/Plan School Records/Reports/IEPs Legal Documents (specify)	 Billing &/OR Insurance Information Medical History, Lab Results, Immunizations Records Progress Review/Summary Treatment Plan(s)
Records Start Date 🗎 🔻 Reco	rds 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: 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. 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. 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. Even if I don't sign this form, the recipient(s) may have a right to obtain my confidential information under applicable law. 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).
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.

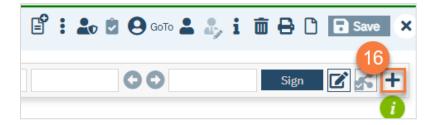
- 12. Enter your agency's information in the Agency Contact Information section.
- 13. The Other section allows you to document if the client received or declined a copy of the document. It also allows you to document how you verified the client's identity as the appropriate person to sign this document.
- 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 Inform	nation				
Program	✓ Attention				
Address					
City	State V Zip				
Phone					
Other	13				
Copy Given to Client 🔿 Ye	es 🔿 Declined a copy Agency Staff				
ID Verified By	er's License Other Picture ID Known to Agency				
	14				
Additional information					
	eleased may contain alcohol and drug abuse information and/or information about Human Immunodeficiency Virus (HIV), Acquired a (AIDS), and AIDS Related Complex (ARC).				
Alcohol/Drug Abuse: I authorize the release of information relating to referral and/or treatment for alcohol and drug abuse. I PROHIBIT the release of information relating to referral and/or treatment for alcohol and drug abuse.					
I authorize the release of	itted Disease/Communicable Disease information relating to HIV/AIDS/sexually transmitted disease/communicable disease. of information relating to HIV/AIDS/sexually transmitted disease/communicable disease.				

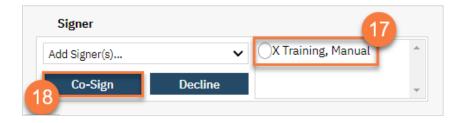
15. Click Sign to complete and generate the document.

🗳 : 🎝 🖄 😋 Goto 💄	🖧 🛅 🖶 🗋 🖬 Save 🗙
00	Sign 💿 < 🕂

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 in a document to the client's chart?
 - 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.

SignaturePage	? ×
19 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.

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.

	Demographics amily	Contacts Release	e of Information Lo	Financial	Primary Care	e Referral External Referr	al Hospitalization
Client Rele	ases						
Release To	Select Re	lease To		✓ Star	t Date	🛗 👻 🛛 End Date	· · · · · · · · · · · · · · · · · · ·
Comment				Att	ach Release Doo	Remind	Days Before End Date
				Doc	ument Attached		
5							Insert Clear
ist Of Rel	eases 🔽 Show	only releases that are o	currently effective				
	Release Name	To Start Date	End Date	Release Documents	Reminder Days	Comment	

6. To revoke an authorization, **click the Revoke button**.

ist	st Of Releases Show only releases that are currently effective RELEASES								
			Release To Name	Start Date	End Date	Release Documents	Reminder Days	Comment	
×	0	6	Training, Sp	01/16/2023	01/16/2024	Release of Inform	D		Revoke
×	\bigcirc		Training, Sp	01/25/2023	01/25/2024	Release of Inform	n	123 Oak Street (916) 555-9999	Revoke
×	\bigcirc	6	Training, Sp	01/25/2023		Release of Inform	n	123 Oak Street (916) 555-9999 F	Revoke

7. In the CDAG pop-up, select your program and click OK.

CDAG	Program Enrollment	?
	Select Program Enrollment	
	Outpatient MH Adult-01/13/2023	
	OK Cancel	

8. Complete the revocation and sign. Have the client co-sign if available.

Revoke Releas	e of Information		[i : 1	р 🖻 😫 GoTo 💄	\$,	Save X
Effective 01/25/202 Revoke Release of	-	Author Rowe	e, Charla 🗸 🗸		00	8 Sign	0 <+ <i>i</i>
Revoke Release	e of Information						
Release To/From:	Training, Spouse, 01/25/2023 -		~				
I withdraw this Aut	horization to Obtain/Disclose protected hea	lth information as of: (01/25/2023 🛅 🔻				
have no effect on a	o further releasing of information may occu ctions taken by (Agency Name) prior to the come Written Concept					uthorization, it will	
Client Unable To	9 Give Written Consent						

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.

eneral De	mographics Con	tacts Release	of Information Lo	g Financial	Primary Care	e Referral External Referra	l Hospitalization
liases Fan	nily						
lient Relea	ses						
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omment				0.00	ch Release Do	Remind	Days Before End Date
omment					ment Attached		
5)							Insert Clear
st Of Relea	ises 🔽 Show only i	releases that are c	urrently effective				
	Release To			Release	Reminder		
	Name	Start Date	End Date	Documents	Days	Comment	

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.

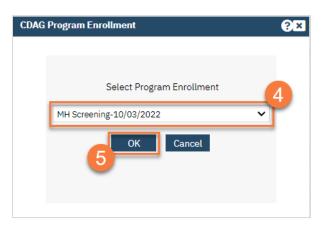
Other consent-like documents, such as Admission Agreements or Advisements are custom for each program. For this reason, these documents are currently done on paper and scanned into the client's chart.

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.

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eneral				a				
tart Date 01/16/20	23 🛗 🔻 End	d Date	ė	•				
etail								
etail								6
Consent For Telehe								
	attn							
		ces from [county] a	and its contracte	ed mental health	and substance	use disorder provider	s and agree that th	his is an
I hereby agree to receiv acceptable mode of del	e telehealth servi ivering health car	e related services						his is an
I hereby agree to receiv acceptable mode of del following statements re	e telehealth servi ivering health can garding telehealt	e related services h:	to me in accorda	ance with the ter	ms of this conse	nt form. I understand	l and agree to the	his is an
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7. Once ready, click Sign.

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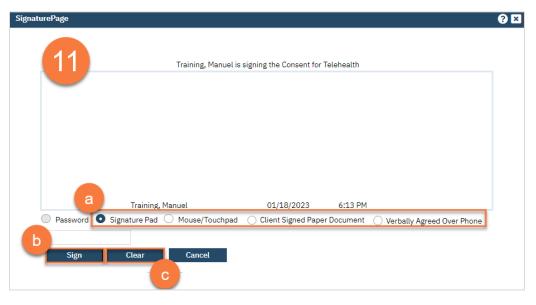
8. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.

Consent for Telehealth		🗳 : 🎝 🖗 🚱 GOTO 🚢 🧞 i 🛅 🖶 🗅 🖬 Save 🗙
Effective 01/18/2023 To Status Signed	Author Staff, Access	Sign C +
≡ PdfBytesHandler.axd		Â
		Client: Training. Manuel ID #: 1268 DOB: 9/1/200 Sent for Telehealth

- 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 in a document to the client's chart?
 - 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.



Once signed by all required people, you are finished.

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.

ionsents (2)					T CONSENT	0 ☆ ★ ±	, \$ (
All Consent Document	✓ Effective From	i	Effective To			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					

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.

	Training, Manual (1239)
Q consents	
S Consents (Client)	

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	9 ☆ ★ ≵	, ¢ ×
All Consent Document	✓ Eff Fro	ective m	i •	Effective To			Apply Filter	
Consent	۵	Client Signed	Start Date	End Date	Revoked	Comments		
Consent For Telehealth		Yes	01/16/2023					*
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.

All Consent Document All Consents Effective From Effective To Consent Client Signed Start Date End Date Consent For Telehealth Yes 01/16/2023	Apply Filter
Consent A Signed Start Date End Date	
Concept Far Talahaalth Van 01/16/2023	Revoked Comments
Consent For Telenealth Fes 01/16/2025	A
Consent For Text Communication Yes 01/16/2023	

Front Office Group Management

Although services are covered above, there are unique attributes to services provided in a group format. We'll cover all group-related documentation in this section.

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).



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

Managing G	rou	ps (1)								
		Active Grou	ips 🗸 All Staff	f V All f	Programs	✓ All Locations	× □ 4	Attendance	Apply Fi	ilter
Group	Δ	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance	
Process Group		Outpatient MH A	Community Menta	Group Psychothe	Clinician,	Supervisor			No	
	4									

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

General Sch	edule						
Гуре		\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 lient(s)				Start Time	3:00 PM		
fedicare G Code							
Comment							
Attendance Group No		~		Default Procedu	179		~
Attendance Group No	ote Type			Default Procedu	_	Client Specific Default.	~
Attendance Group No Add a	ote Type	ster to new group serv		Staff	Set	Cliont Specific Default.	
Attendance Group No Add a	ote Type all clients enrolled in Program pomatically add clients from ros y attend this group.			Staff Staff that may lead	Set	Client Specific Default.	-
Attendance Group No Add a Clients Auto Clients which ma Cuent name	all clients enrolled in Program and clients enrolled in Program omatically add clients from ros y attend this group.	ster to new group serv		Staff Staff that may lead Is Clinician	Set d this group. Staff Name		
Attendance Group No Add a Clients Auto Clients which ma cuent Name Asano, Jasor	all clients enrolled in Program	ster to new group serv		Staff Staff that may lead Is Clinician X	this group. Staff Name Clinician, Robe	rt	
Attendance Group Nc Add a Clients Auto Clients which ma Clients which ma Clients which ma Asano, Jasor Bravo, Johnr	all clients enrolled in Program	ster to new group serv		Staff Staff that may lead Is Clinician	Set d this group. Staff Name	rt	
Attendance Group Nc Add a Clients Auto Clients which ma Clients which ma Clients which ma Clients which ma Samo, Jasor Bravo, Johnr Powers, Ligh	all clients enrolled in Program and clients from ros y attend this group.	ster to new group serv		Staff Staff that may lead Is Clinician X	this group. Staff Name Clinician, Robe	rt	
Group Ne Group Ne Clients Aute Clients which ma Cuent name Asano, Jasor Bravo, Johnr Powers, Ligh	all clients enrolled in Program and clients from ros y attend this group. y y t t oby	ster to new group serv		Staff Staff that may lead Is Clinician X	this group. Staff Name Clinician, Robe	rt	

- 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.

Client Search

Broad Sea Last Name Other Search S	Test	row Search Typ		ient O Indi Name	vidual 🔵 Organ	-			
			First	Name					
ther Search S	Strategies					Prog	ram	~	·
	0								
SSN Sea	rch				Phone # Sea	arch			
DOB Sea	rch a		•		Master Client	t ID Search			
Primary Clir	nician Search			\sim	Client ID Se	arch			
Authoriza	tion ID / #				Insured ID S	earch			
ecords Found	ł								
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		
0 1091	1091	Test, Max		6345	01/01/1990	Active	Middle	Rapp, Chris	
0 1080	1080	TestCH, Client		9999	01/20/2011	Active			

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

Group Details				? i ♣ 🖬 Save 🗅 🖮 🗙
General Schedule				9
Туре	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.

			✓	✓ All Locations	Programs	✓ All F	ups 🗸 All Staff	Active Gro		
Group 🛆 Program Location Procedure Staff 1 Staff 2 Staff 3 Staff 4	Attendance	Staff 4 At	Staff 3 Staff 4	Staff 2	Staff 1	Procedure	Location	Program	Δ	Group

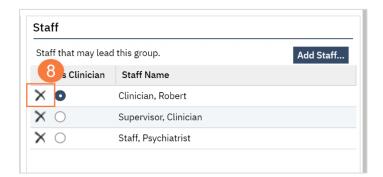
5. Locate the Staff section towards the bottom of the Group Details screen. Click Add Staff.

Schedule Type Default Procedure Schedule Type Default Procedure Schedule Type Default Procedure Schedule Type Staff
Schedule Schedule Type Schedule in Program Default Procedure Set Client Specific Default
Schedule Type V Lients enrolled in Program Default Procedure Set Client Specific Default
Type V lients enrolled in Program Default Procedure Set Client Specific Default
Type V lients enrolled in Program Default Procedure Set Client Specific Default
Starr
tand this group
Add Clients
Is currician Starr Name X Clinician, Robert X Supervisor, Clinician
15 Cunician Stan Name
tend this group. Add Clients Staff that may lead this group. Add Sta

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

Group Se	ervice Staff Pop Up				? ×
			7		
				ок	Cancel
	Staff, Access				^
	Staff, Billing				
	Staff, Clerical				
	Staff, Compliance				
	Staff, Nurse	6			
	Staff, Psychiatrist				i
	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.



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



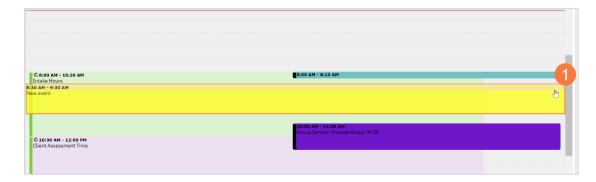
My Calendar Management

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.



- 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 2	
O New Service Entry	
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.
- 8.

rogress Note ((MH)				ľ : .
Effective 11/21/2022	2 Status New		Author Clinic	sian, Robert	
Service Note	Billing Diagnosis Warnings				
Status	Scheduled	× _	Start Date	11/21/2022	
Program	Outpatient MH Adult	~4	Start Time	08:30 AM	
Procedure	Therapeutic Behavioral Services	~ 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	<u> </u>	1
			Referring	\ \	~

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

Q ★ L <u>Test, Max (1091)</u>	▶ i ♥ ☎ ≜ : + ×		🖆 🍂 🔊	? Access Staff - ሀ
Progress Note (MH)			🖹 : 🎝 🖄 \varTheta 👓 💄 🕁 🗯 🖤 ?	🕞 Save 🗋 🖶 🗰 🗙
Effective 11/21/2022	Status New	Author Clinician, Robert	CO	ToSign
Service Note Billing Diagnosis	Warnings			0
Service				
Status Scheduled	✓ Start Date	e 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.

Other 0 8 0 3 0 0 0 0
8 0 3 0
8 0 3 0
0 3 0
<u>3</u> 0
0
:
d cancelle
ient.Than
ts Mental
n <u>, I wa</u>
are update.
nt or

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

rogress Note	e (MH)				🖹 : 🎝 🖄	Ө ∞ •• ▲ ☆ ★ 🗗 🛍 🗄 💵 1	? i 🖻 Save 🗋 🖶 🛅
Effective 11/22/202	022 Status To Do		Author Clinicia	n, Robert	11/17/2022	00	Sign 💿 🖍 🕇
Service Note	Billing Diagnosis Warnings						<u>i</u>
Service							
Status	Scheduled	\sim	Start Date	11/22/2022	2 🗰 🕶		
Status Program	Scheduled Outpatient MH Adult	~ ~	Start Date Start Time	11/22/2022 1:00 PM	2 🛗 🕶		
				1:00 PM	2 🗎 🕶		
Program	Outpatient MH Adult	~	Start Time	1:00 PM			

				Clinician, Robert		
	SUN 11/20	MON 11/21	TUE 11/22	WED 11/23	THU 11/24	FRI 11/25
8:00 AM		C 8:00 AM - 10:30 AM Intake Hours	C 8:00 AM - 10:30 AM Intake Hours	C 8:00 AM - 10:30 AM Intake Hours 8:15 AM - 9:00 AM New event	3 Store AM - 10:30 AM Intake Hours	C 8:00 AM - 10:30 AM Intake Hours
		_				
9:00 AM		_				
		9:30 AM - 10:0 CalAIM		-		

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

- 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	
Reschedule	
Consumer Cancelled (Transport Is: 🗸	
	6

- 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) 🗙									ď	* 0	"D	Acc	• 8	f• U
ervice Detai	ι					Regenerate	Charge 🗧	: 2 / 5	ŭ ☆ 1	k (°	¢ i	i A₿	Save	•	0 🖻
Service Detail	Billing Diagnosis Authorization	i)					6								
Service							0								
Client	Asano, Jason Status	Scheduled 🗸	Start Date	11/22/2022	Program	Outpatient MH Adult	~								
Procedure	Family Psychotherapy (Conjoint psychot)	✓ Modifier	Start Time	11:00 AM	Total Duration	60 Minutes									
Clinician Name	Staff, Psychiatrist	-			End Date	11/22/2022									
Location	Office	 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 ? MP ≜ 0											
Face to Face Time				(707) 555-4567											
Documentation Ti	me						- 1								
			Override	e Charge Amount	Overrido	len By									
Evidence Based P	ractices	v	Override	e Errors	Overrido	len By									
Transportation Se	rvice 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.

acking Widget 🕧									1	0	Assigned Do	cument(s)				
Workgroup	All Workgroup	os 🗸	O As	signed		Clinician, Robert	~					N	otes	ISP	Assessment	Other
racking Protocol	All Flags		⊖тх	Team Role	•	All Assigned Role	es 🗸				Due Now		0	Q	Q	0
Flags Track	ed	Due in	90-61 [Days		Due in 60-31 Days	Due in 30) Days or Les	s Overdue		In Progress		0	<u>v</u>	0	8
Assessment Needed			<u>0</u>			<u>0</u>		1	<u>8</u>		Due in 14		0	0	<u>0</u>	0
CalOMS			<u>0</u>			Q		Q	2		Co-Sign		0	0	0	3
CANS due for this client			<u>0</u>			Q		<u>0</u>	1		To-Sign		0	0	<u>0</u>	0
CSI admission			<u>0</u>			Q		<u>0</u>	<u>5</u>		Assigned		0			-
Staff Safety Concern			<u>0</u>			Q		<u>0</u>	1							
UMDAP Due			<u>0</u>			<u>0</u>		<u>0</u>	1							
<u>Update Problem List</u>			<u>0</u>			Q		1	5							
WRAP			0			0		0	1	Ψ.						
pointments For Toda	ıy			C	1	New Alert/Messag	es									4
Client Name/Description	Time	Status				From	Received		Client	Sub	oject		Messa	age		
TestCH, Client(Ass	08:00 AM	Cancel				Rowe, Charla	11/17/2022	2 .	Asano, Hiro	Con	tact Note: Appointn	ent	Appoi	ntment - (lient called and	cancelle
Process Group	10:00 AM	Show				Staff, Access	08/24/2022	2	Young, Butters	Plea	ase Contact		<u>Hello,</u>	Please se	outreach to clie	nt.Than
Lunch	12:00 PM	1)				Staff, Access	08/24/2022	2	Anderson, Jan	Men	ntal Health Documer	its	<u>Hello,</u>	<u>Please op</u>	en collect clients	<u>Mental</u>
<u>Asano, Jason(Thera</u>	01:00 PM	Scheduled)	🛡 🛤	c	Supervisor,	08/23/2022	2	Thompson, Toby	Diag	gnosis Document - T	hom	<u>Hi, let</u>	's discuss	Toby's situation	<u>I wa</u>
Asano, Hiro(Assessment)	03:00 PM	Scheduled	ATP		1	Sullivan, Ke	08/21/2022	2	Jones, Ryan	Plea	ase verify		Please	e ensure F	yan's consents a	are update.
Paper Work	04:00 PM															
Paper Work	<u>04:00 PM</u>															

- 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.

Progress Note (MH)				🗳 : 🎝 I	2 🕒 GOTO 🍰 🏠 🛧 🗋 🛙	🛚 ? i 🖻 Save 🗅 🖶 🛅 🗙
Effective 11/22/2022	Status To Do	Author Clini	cian, Robert		11/17/2022	00	5ign 💿 💦 🕂
Service Note	Billing Diagnosis Warnings						0
Service		2					
Status	Cancel	✓ Start Date	11/22/20	22 🛗 🕶			
Program	Outpatient MH Adult	✓ Start Time	2:30 PM				
Procedure	Therapeutic Behavioral Services	 Travel Time 		Minutes			
Location	Office	✓ Face to Face Time		Minutes			
Clinician	Clinician, Robert	Documentation Time		Minutes			
		3 Total Duration	30	Minutes			
Cancel Reason	Consumer Cancelled (Transport Issues)	Attending			\sim		
		Referring			\sim		
Evidence Based Practi	ices	~					

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.

acking Widget 🕧								1	0	Assigned Docu	ment(s)			0
O Workgroup	All Workgroup	is 🗸	Assig	ned	Clinicia	an, Robert 💦	~				Notes	ISP	Assessment	Other
Tracking Protocol	All Flags		◯ Tx Te	am Role	All Ass	igned Roles	~			Due Now	Q	Q	Q	Q
Flags Track	ed	Due in	90-61 Day	/s	Due in 60-31 l	Days Due	in 30 Days or Less	Overdue		In Progress	<u>0</u>	<u>v</u>	<u>0</u>	8
Assessment Needed			Q		<u>0</u>		1	8		Due in 14	0	0		0
<u>CalOMS</u>			<u>0</u>		<u>0</u>		<u>0</u>	2		Co-Sign		0		3
CANS due for this client			<u>0</u>		<u>0</u>		<u>0</u>	1		To-Sign		0		0
CSI admission			Q		<u>0</u>		Q	5		Assigned		0		
Staff Safety Concern			<u>0</u>		<u>0</u>		Q	1						
UMDAP Due			<u>0</u>		<u>0</u>		Q	1						
Update Problem List			<u>0</u>		<u>0</u>		1	5						
WRAP			0		0		0	1	Ψ.					
ppointments For Toda				C	New Alert/									C
Client Name/Description	Time	Status			From	Recei		lient	Sub	-	Mess	-		
TestCH, Client(Ass	08:00 AM	Cancel			Rowe, Cha			sano, Hiro		tact Note: Appointmen			Client called and	
Process Group	<u>10:00 AM</u>	Show			Staff, Acce			oung, Butters		ise Contact			t outreach to clie	
	12:00 PM				Staff, Acce			nderson, Jan		tal Health Documents			en collect clients	
Lunch	01:00 PM	Scheduled	₩ i		Supervisor			nompson, Toby		nosis Document - Tho			Toby's situation	
Lunch Asano, Jason(Thera	01.00 PM				Sullivan, K	e 08/21	./2022 J	ones, Ryan	Plea	ise verify	<u>Pleas</u>	e ensure F	Ryan's consents a	are update
	03:00 PM	Scheduled	ATP 🗄											

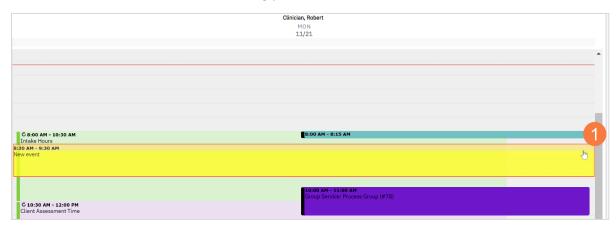
- 2. The Progress Note screen will open, click the drop-down menu in the Status field and select No Show.
- 3. Click Save to cancel the appointment. Click the X to close.

rogress Note	(MH)				Ë : 💵	🖄 😑 GOTO 🏯 🏠 ★ 🕒 💵	1 ? i 🖸 Save 🗅 🖶 💼 3
Effective 11/22/202	22 Status To Do		Author Clinician	, Robert	11/17/2022	00	Sign 💿 💦 🕇
Service Note	Billing Diagnosis Warnings						0
Service		2				_	
Status	No Show	\sim	Start Date	11/22/2022	2 🗰 🕶		
Program	Outpatient MH Adult	\sim	Start Time	2:30 PM			
Procedure	Therapeutic Behavioral Services	\sim	Travel Time		Minutes		
Location	Office	\sim	Face to Face Time		Minutes		
	Clinician, Robert		Documentation Time		Minutes		

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.



- 2. In the New Entry Type pop-up, select the New Calendar 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. 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.

				i
dd	4			
Subject CalAIM Tra				
Location		✓ Specific Location		
Start Time 11/21/202	2 💼 09:30 AM	5 End Time	11/21/2022 👼 10:00 AM	All day Event
Appointment Unavailable		Show Time As	Busy V	
Staff Clinician, R	obert LCSW Licensed Clir	ica 🗸		
Description				

Front Desk Workflows

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 Ca	lendar 🔥		B		С		D		i i s c	‡ 🕒	ר
Multi	Staff View 🗸	Mh clinicians	~		30 Minutes Intervals	~	Define Group	< Showing 1-3/3 >		Apply Filter	I
📋 Today	苗 Day 📋 Week	🛗 Month	C Refresh	>	Nov 22 2022		·				
F	G	Clinician, Robert TUE 11/22	H			Stephan, Khristy TUE 11/22			Supervisor, Clinician TUE 11/22		
											•
8:00 AM	C 8:00 AM - 10:30 AM Intake Hours				8:00 AM - 10:00 AM ntake Time						
9:00 AM											
10:00 AM	C 10:30 AM - 12:00 PM Client Assessment Time	10:00 AM - 11 Group Service	L:00 AM e: Process Group (#79)		10:00 AM - 12:00 PM lient 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) ×
≗ <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

- 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.

Plan Any	✓ Service Ar	a Any	✓ Programs Any		~
ocation Any	∽ Staff	ny	∽ License Any	✓ License Group	Any
Sex Any ~	Speciality Any	~ C	Category Any	\checkmark Allow Overbooking Up to	Appointment(s)
Minutes 15 From	8:00 AM	To 8:00 PM	Any Week	ам 🛛 т 🗹 w 🗌 т 🗌] F 🗌 S 🗌 S
Only show time slots	marked as Free	Appt. Type Inta	ke 🗸 S	tart Date 11/17/2022 🗎 🔻 Sea	rch

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

Minut			8:00 AM arked as Free	🕭 т	o 8:00		A Intake		Any Weekday	_	T T ate 12/0	W		F Search	S	S	
_		Range Prefe			Appt.	туре		arch for Cli	ent Test, Max	Start D				er a Time	<u>ly Appt.</u>		
6		Staff Nan	ne					Date/Time		Δ	Duration	ı	Туре		Loc	ation Name	,
8	×	<u>Sullivan, ł</u>	Kevin				-	11/21/202	2 8:00 AM		210 min	s	Intake		Con Cen	nmunity Me ter	ntal Health
6	×	<u>Stephan,</u>	<u>Khristy</u>				-	11/21/202	2 8:00 AM		120 min	s	Intake				
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ö	×	<u>Clinician,</u>	Robert				1	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.

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Procedure	Assessment	~	Modifier	Start Time	8:00 AM		Total Duration	15	Minutes	
Clinician Name	Clinician, SUD						End Date	11/21/202	:2	
Location	Community Mental Health	Center 🗸	Attending			~	Referring			~
Client was present	Other Person(s) Present				Cancel Reaso	n				~
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10. Click Save to schedule the appointment. Click the X icon to close this screen.

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Client TestCH, Client Status	▲ Client is not enrolled in this program. Scheduled ✓ Start Date 11/21/2022 Program MH Screening	
Procedure Assessment ~	Modifier Start Time 8:00 AM Total Duration 15 Minutes	
	F 10 - 44/04/0000	

Reception View

- 1. Click the Search icon.
- 2. Type "Reception" in the search bar.
- 3. Select "Reception/Front Desk (My Office)" from the search results.



- 4. 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.
- 5. 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.

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).

≡ SmartCare	
≗ ⊞ ∷≡	Reception
My Office >	S Reception/Front Desk (My Office)
💄 Client 🔶	

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**.

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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 an 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.

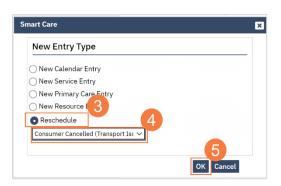
Note: This number indicates the number of times this appointment has been rescheduled.

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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.

	Clinician, Robert MON 11/21	
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C 8:00 AM - 10:30 AM Intake Hours	8:00 AM - 8:15 AM	2
New event		ų
C 10:30 AM - 12:00 PM	10:00 AM - 11:00 AM Group Service: Process Group (#78)	
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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Service								0 ^								
Client	Asano, Jason Status	Scheduled 🗸	Start Date	11/22/2022 🛅 🔻	Program	Outpatient MH	Adult 🗸									
Procedure	Family Psychotherapy (Conjoint psychoth	Modifier	Start Time	11:00 AM	Total Duration	60 Minutes										
Clinician Name	Staff, Psychiatrist	1			End Date	11/22/2022										
Location	Office	 Attending 		~	Referring		~									
Client was present	Other Person(s) Present			Cancel Reason			\sim									
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How to Schedule a Follow-up Appointment

To schedule a follow-up appointment, follow the steps below:

- 4. 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.
- 5. You can add a comment to the service by clicking on the link in the Comment column.
- 6. To open the client's chart, click on the link in the Client column.

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Other Functionality

Introduction?

How do I create a flag to alert treatment team members to important client information?

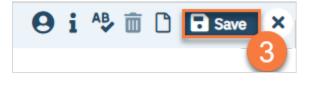
1. Make sure you have the client open. Click the plus icon next to the client's name.



- 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.

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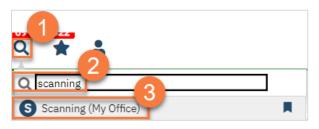
3. Once you've added all flags, **click Save**. You are now finished and may close this screen.



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.



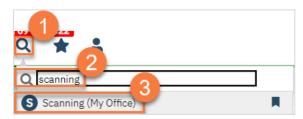
- 4. To scan, you need a scanner attached to your workstation. Scanning will use your scanner's software but save it in SmartCare.
 - a. To scan a single document, click the "Scan New Images" icon.
 - b. To scan multiple documents in a batch, click the "Start Scan Upload" button.

All Associations	~				All Reco	rd Types				~ Apply	Filter	
Show Scanned/Uploaded	~	Staff, Access		~	Not Com	pleted	~					
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Associated With	ID	Name	Record Type	Crea	ted ⊽	Effective	Sca	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?

Note: At this time, you can only upload documents that are in PDF file format.

- 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 Recor	rd Types				✓ Apply	Filter	
Show Scanned/Uploaded	~	Staff, Access		~	Not Com	pleted	~					
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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		ĥ	Save	×
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Record Type	✓ Description	Program		
Image Details				
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	Upload Cancel			
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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	2	
	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.

Upload File Detail			🖺 🗋 Save 🗙
Record Type	9 Description		
Image Details	ile Append File Page 1 V Of 1		
	Please wait If this message is not eventually replaced by viewer may not be able to display this type You can upgrade to the latest version of Ad visiting http://www.adobe.com/go/reader_c For more assistance with Adobe Reader visi Windows is either a registered trademark or a trademark of Micro	obe Reader for Windows®, Mac, or Linux® by lownload.	demark

a. This will bring up the client search. Use the client search to find the client. Click Select when you've located the client.

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)	1268	1268	Training, Manuel		3545	09/01/20	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.

