

August and September 2025 MSP Clinical Highlights

Sept #104 (EII 131854): New Report “Program Assignment Details by Date”

A new report called “Program Assignment Details by Date” has been created by Streamline. This is not something that CalMHSA requested, but we have tested it and found that counties may find it useful. The report shows both a summary of how many program assignment records exist for the programs selected in the parameters and the details of these program assignment records. More information about this report can be found on the Reporting System Administration page. The following user roles will be granted permission to this new report: CalMHSA Sys Admin, County Affiliate Sys Admin, Medical Records/Quality Assurance, Billing, Clinician Supervisor, Medical Supervisor.

Aug #6 (EII 131826): Appointment Search now has an icon to advance search dates forward 15 days

A long time ago, the Appointment Search screen would automatically search the next 15 days. Upon executing the search, these dates would update to the subsequent 15 days. This functionality was altered to where users could enter in whatever dates they wanted. But it seems some Streamline customers liked the automatic 15 day forwarding, so a new icon has been added next to the search dates fields. It looks like the “fast forward” button and will push the search dates to 15 days out. This mimics the previous functionality while not making it automatic.

Aug #138 (EII 131703): PDF Headers will now show on Scanned/Uploaded Documents

This change brought CalMHSA’s attention to four configuration keys that impact header information on all documents in SmartCare. Currently, CalMHSA has all of these keys set to not display, as documents are often viewed online rather than printed. However, we understand that when documents are printed, pages can get separated and therefore BHPs may want to include client data, such as name, on each page in case the pages get separated. With this change, these header configurations will also show on scanned and uploaded documents once they’ve been attached to a client’s chart. CalMHSA does not plan on making any changes to these configuration keys at this time, but we have added these to our list of Configuration Keys on our Knowledge Base website on the System Administration page.

Aug #24 (EII 130941): “Client is an Adult with Guardian” is now a Client Flag rather than Hard-Coded

A little while ago, Streamline implemented an alert on a client’s chart that mimicked the Client Flags, but was hard-coded into the system. When a client who was 18 years or older had a contact person marked as “Legal Guardian” in their Client Information screen, the system would show what looked like a flag on that client’s chart. When hovering over this flag, the label would be “Client is an Adult with Guardian”.

In this MSP, Streamline has changed this into an actual Client Flag. However, the functionality appears to be the same. By turning this into a flag, system administrators can turn off this functionality by making the related flag inactive. During testing, CalMHSA found that this flag was deployed as inactive, meaning counties would have to activate this flag to get the functionality.

Testing Notes:

1. Clients who previously had this pseudo-flag showing on their record no longer had this showing. Only upon re-saving the Client Information screen did the Flag get re-added. IMPACT: Counties who have been using this functionality will need to update Client Information in order to have this flag re-appear. Counties who have been using this functionality may want to alert their staff that deployment of this MSP may cause this flag to disappear from clients who still meet the requirements.
2. Saving the Client Information screen so that the client still met the requirements *automatically added the flag* to the client’s record. The user did *not* have to manually add the flag.
3. When the user manually removed the flag, but made an unrelated update in the Client Information page, the flag was re-added automatically. It seems, therefore, that this flag should only be removed by updating the Contacts in the Client Information screen and removing the “Guardian” and/or “Legal Guardian” checkboxes from any and all contacts.

CalMHSA will leave this flag inactive in production systems. If counties want to use this flag, they can activate the flag “Adult Client with Guardian” to do so. If counties run into issues with this functionality, please submit a Help Desk ticket and we will work with Streamline to address the issues.

Sept #33 (EII 131832): Optimizing handling of large disclosure PDFs

Streamline seems to have created new functionality to help avoid system slow-downs when creating a large PDF for a disclosure request. This will allow the system to queue up the PDF creation process where it can run at a scheduled time. The information in the release notes is more technical than clinical, so reach out to your system administrator for details about how to set this up for testing.

Sept #27 (EII 132301): Adding “OR” functionality to All Client Search

The All Client Search feature of SmartCare allows a user to search by name, date of birth, and SSN all at the same time. It also allows users that don’t have access to view all clients normally to be able to find a client record using different Client Access permissions. (See [All Client Search](#) for more details)

With this release, Streamline has added the “OR” function as a configuration key value. When “OR” is added to the configuration key values, the system will return client records that mean any of the search parameters, rather than all of the search parameters.

Sept #40 (Core Bugs 132912): All Client Search no longer saves search results in Cache

Prior to this release, when a user used the All Client Search feature to access a client outside of their Client Access permissions, they could easily find the client again using a regular search. This is because the access to this client was being saved in cache. With this release, this will no longer occur. To re-access a client that the user only can view through the All Client Search feature, the user must use this All Client Search feature again.

Sept #137 (EII 131749): Added “Submitted” and “Re-Submitted” status of Service Requests to Widgets

Before this release, the only status showing on the My Service Request widget (and the supervisor equivalent) were those that required user action (e.g. Pending and Awaiting Additional Information). CalMHSA requested that the status of Submitted and Re-submitted also be added, so that users can check on requests they’ve submitted but have not been addressed. Requests with the status Complete will still not show.

Sept #58 (EII 132205): Changes to Release of Information document

The Legal Authority dropdown field has been moved from the Release To/Obtain From section to its own section at the bottom of the document. The release notes indicate there is a new global code that will be used for the Information Used/Disclosed Section, but testing did not show any visible changes, so this appears to be a back-end change only.