ISL Encounter Reporting

In-depth guide for county system administrators · Last updated October 30, 2026

Labels used in this guide: DHCS … the DHCS document a rule comes from; CalMHSA decision a rule that reflects CalMHSA's interpretation or design choice; **Open item** behavior that may change, explained under Open items. Red boxes in the pictures mark the part each section is about. All pictures show test data from a test system.

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About this guide

This guide explains the **ISL Encounter Reporting (Administration)** screen in SmartCare in detail. It is written for **county system administrators** who set up access, support billing staff, and need to understand why the screen behaves the way it does.

Billing staff who only need the day-to-day steps should start with the *ISL Encounter Reporting* how-to article in the CalMHSA Knowledge Base.

Some ISL requirements are still awaiting answers from DHCS, and a few design decisions are still being finalized. These are marked **Open item** and listed together under Open items, with what SmartCare does today. CalMHSA will update this guide as answers are received.

All screenshots come from a **test system** and show **test data only**. No real clients appear in them.

What the screen is for

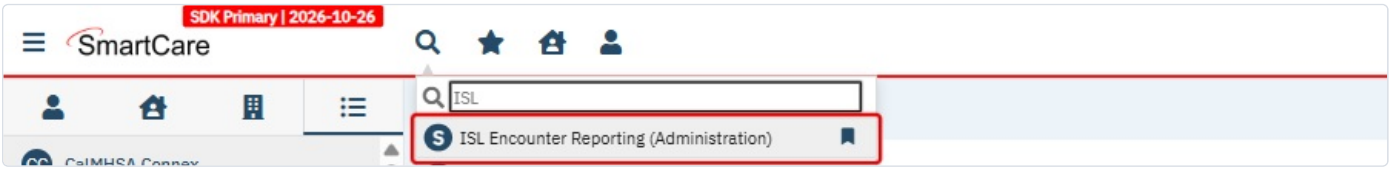
From 1 January 2027, counties must report to DHCS the behavioral health services they deliver that Medi-Cal does not pay for. These are called **ISL (Individual Service Level) encounters**. This screen lists the completed SmartCare services that might need to be reported, works out which ones are reportable, and builds the files you upload to the DHCS ISL Portal. It also keeps track of what DHCS said about each encounter (accepted or rejected), lets you send corrections (Replacement) and withdrawals (Void), and flags sent encounters whose data has changed since they were sent.

- ISL covers only services that are not reimbursable through Medi-Cal. DHCS ISL Encounter Reporting Guidance v1.0, p.3
- Reporting is required from 1 January 2027. 1 July to 31 December 2026 is a voluntary test window.
  DHCS ISL FAQ (copy of 2026-09-17), p.3; DHCS ISL Encounter Reporting Guidance v1.0, p.3

How to open it

How to use it

1. Click the search (magnifying glass) icon in the SmartCare banner.
2. Type **ISL**.
3. Choose **ISL Encounter Reporting (Administration)** from the list.



Opening the screen: type ISL in the banner search and choose ISL Encounter Reporting (Administration).

What happens when it opens

- The screen opens on the Administration tab. You do not need to select a client first.
- It puts back the filters you last applied in this browser tab, and says so: *"The filters you last used on this screen were put back - the grid, the count and Select All cover only the matching rows. Change or clear them in the filter section."*
- If CalMHSA has turned on automatic Full Re-pickup for your system, opening the screen first runs a Refresh and then Full Re-pickup. It is off unless CalMHSA turns it on. See Configuration settings.
- If the server reports an error while the page loads, the message stays on the status line and the grid is not loaded.

Who can see it

- The **County Affiliate SysAdmin** role has access to the screen. Other roles need the screen permission added by a county system administrator. **Open item**
- After access is granted, the user must log out and log in again. The search list is loaded at login.
- Buttons a user has no permission for are not shown at all. **Refresh Unsubmitted Encounters**, **Refresh Filtered Lines** and **Submissions** are always shown. The download links and the record view (View) need the export permission.

Configuration settings

Two settings on SmartCare's **Configuration Keys** screen affect how this screen behaves. **CalMHSA manages both settings. Counties should not change them.** If you believe a setting needs to change for your county, contact CalMHSA.

They are described here so you can recognize their effects and explain them to staff.

Reporting start date: `CalMHSAISLReportingStartDate`

- A service dated **before** this date is not ISL reportable. Its line reads *No*, and the hover says *"service date is before the ISL reporting start"*. A service dated **on** the start date counts.
- It does **not** decide which services appear on the grid. Refresh picks up services from the last year, never before 07/01/2026, so earlier services still appear, marked *No*.
- DHCS requires reporting for services from 01/01/2027. The production start date is expected to be 01/01/2027. **Open item**
- If CalMHSA changes the date, Export for Submission uses the new date at once, and the grid's ISL Reportable column updates after the nightly Refresh (or sooner for lines rechecked with **Refresh Filtered Lines** or a row's **Refresh** link). Files already sent are never changed; accepted lines that the new date makes not reportable are flagged under **Changed since sent**.

Automatic Full Re-pickup: `CalMHSAISLAutoFullRepickup`

This setting is **off** unless CalMHSA turns it on. **Open item** When it is on, opening the screen runs **Refresh Unsubmitted Encounters** and then **Full Re-pickup**, without asking.

What the automatic run does and does not do

- It stages only **Replacements** for accepted lines whose service or client data has changed, at most 200 each time the screen opens.
- It never stages a Void or a Re-pickup. It never stages a Replacement that needs a person to confirm it: a change only in a race/ethnicity mapping,

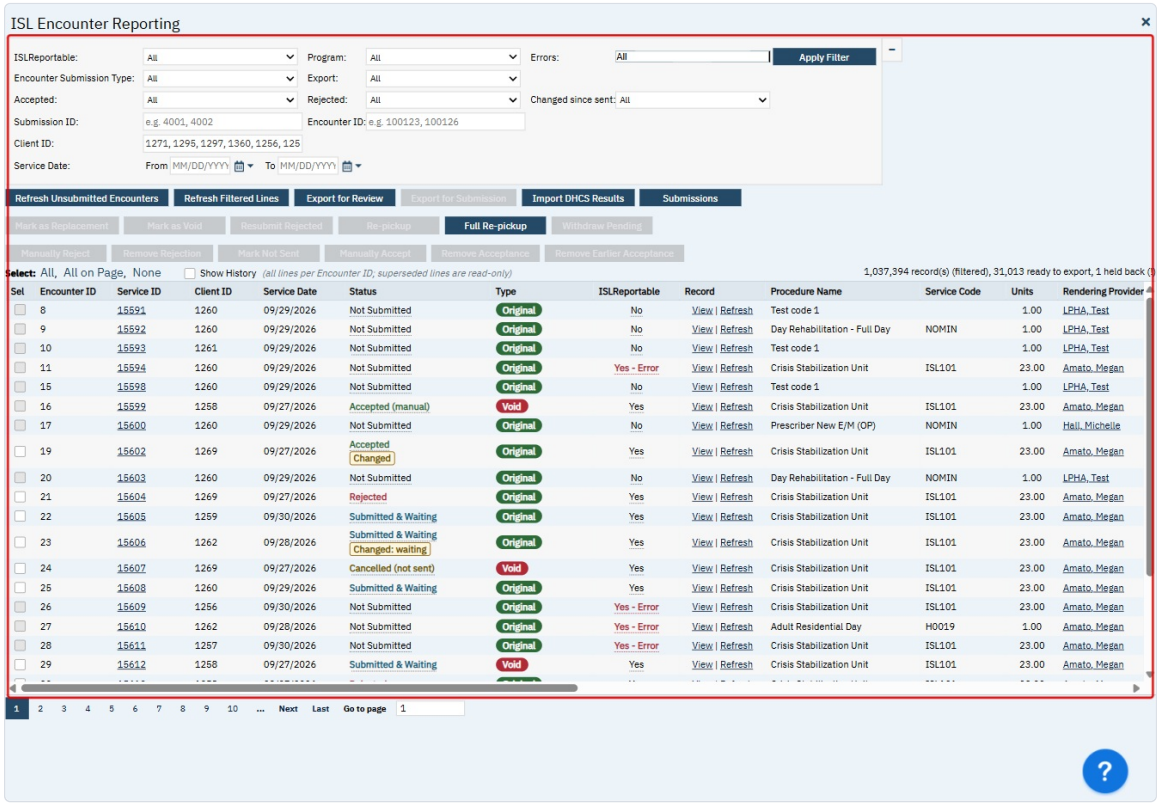
admission or discharge dates, or a county-wide setting; a field that changed on many lines at once; or a line whose acceptance was recorded by hand.

- Everything it stages is pending (not sent). Nothing goes to DHCS until someone exports it, and **Withdraw Pending** takes a staged line back.
- Refresh runs for everyone who opens the screen. The Full Re-pickup part runs only for a user with the permission for line actions.
- It runs only when the screen is opened, not as part of the nightly Refresh.

Messages

- When it has run, a message starting *"Automatic Full Re-pickup (CalMHSAISLAutoFullRepickup = Y): N line(s) staged …"* counts what was staged and what was left for a person to review, and ends by noting that nothing has been sent to DHCS.
- If Refresh or its change detection did not finish: *"The automatic Full Re-pickup did not run: the Refresh or its change detection did not finish. Run Refresh Unsubmitted Encounters again, then Full Re-pickup."*
- If the Refresh was refused or failed, its error is shown, followed by *"The grid shows the lines as last refreshed."*

The grid and its columns

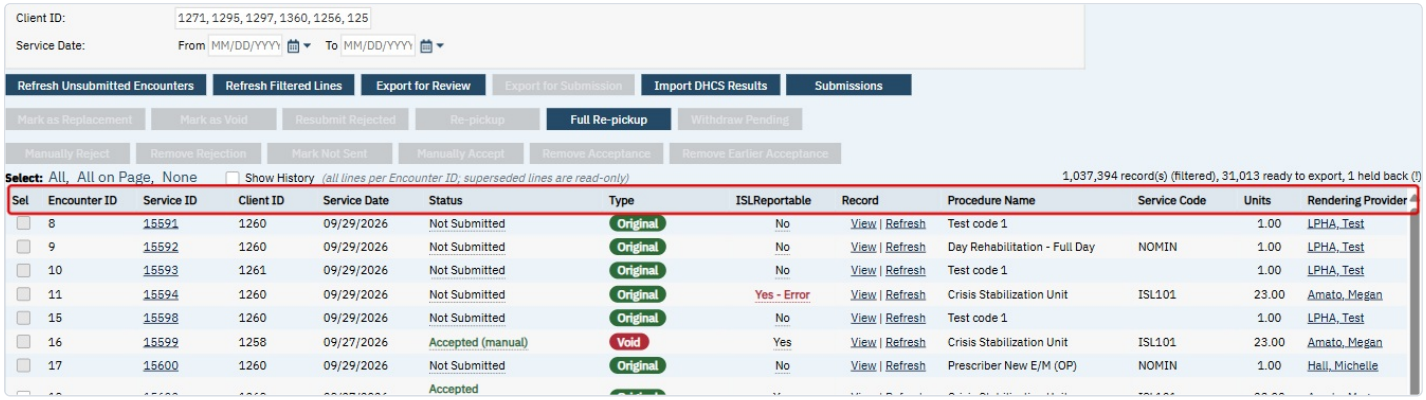


The whole screen: the filter box at the top, the action buttons, and the grid.

What it shows

Each row is one **encounter line**: one charge line of one completed SmartCare service. A service with two charges gives two rows. A service with no charge gives one row. The grid is wide, so scroll sideways to see every column. The column headings stay in place when you scroll down.

A line that has **not** been sent shows today's SmartCare data. A line that **has** been sent shows the values exactly as they were sent (a frozen copy), even if the data in SmartCare has changed since. Use the row's **View** link to compare the two.



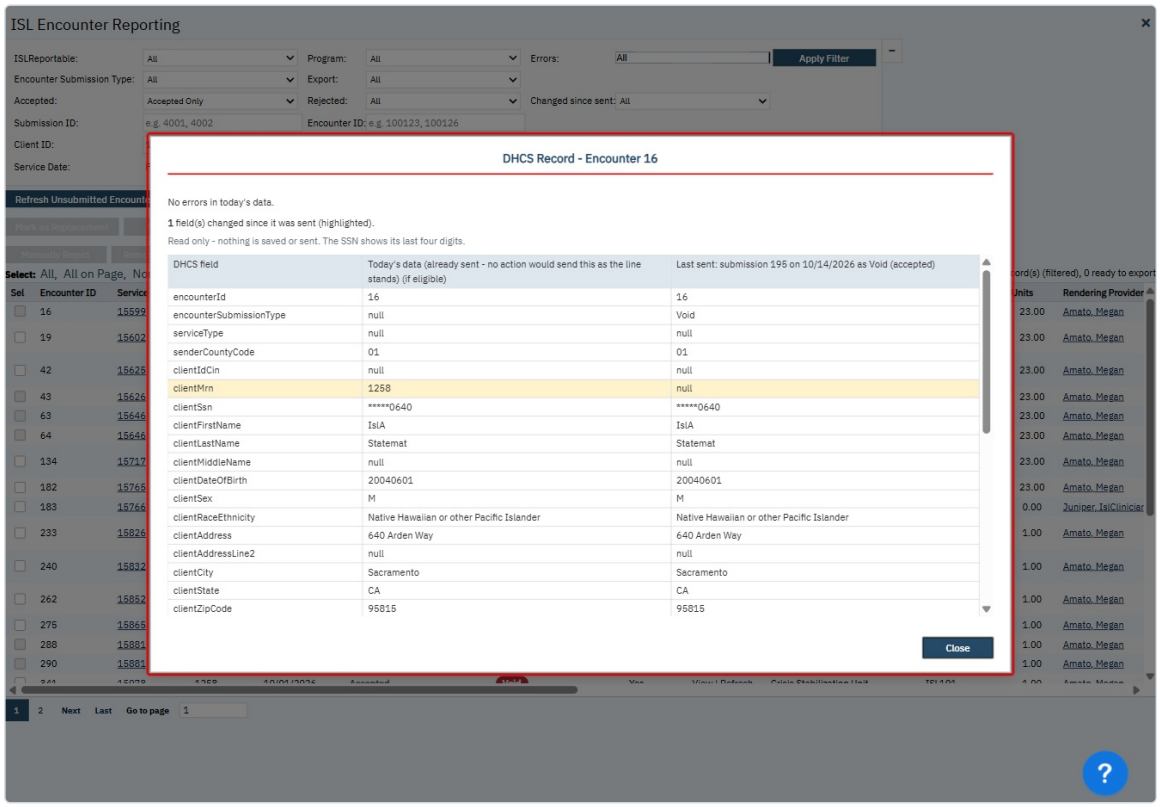
The column headings. The grid is wide; scroll right to see the rest of the columns.

Column	What it means
Sel	Tick box to choose the line for an action. It is greyed out when no action applies to the line; hover to see why.
Encounter ID	The number sent to DHCS to identify this encounter. A Replacement or Void keeps the same Encounter ID.
Service ID	The SmartCare service the line came from. Click it to open the service (Service Detail, My Office tab); Back returns to this screen.
Client ID	The SmartCare client ID.
Service Date	The date of service.
Status	Where the line is in its life, for example *Not Submitted*, *Pending (not sent)*, *Submitted & Waiting*, *Accepted* or *Rejected*. Hover for the detail. A small badge underneath (for example *Changed: review* or *Reportable again*) means the data changed since the line was sent. See Line states.
Type	Original, Replacement or Void: what the line is, or will be when sent.
ISLReportable	*Yes*, *No* or *Yes - Error*. Hover for the reason. See The ISL Reportable column.
Record	**View** opens the DHCS record for the line (needs the export permission). **Refresh** rechecks this one line from today's data.
Procedure Name	The SmartCare procedure's display name. This is not the same as the Service Code.
Service Code	The billing code that will be (or was) sent to DHCS.
Units	The quantity sent to DHCS.
Rendering Provider Name	The clinician who delivered the service. Click it to open Staff Details for the service's current clinician.
Program Name	The program on the service.
Location Name	The service location.
Diagnosis	The primary diagnosis sent to DHCS.
Modifiers	Billing code modifiers, comma separated. `--` if none.
Coverage Plan	The coverage plan on the service's charge.
Insured ID	The client's Medi-Cal ID (CIN), taken from the client's Medi-Cal coverage. Sent to DHCS as the CIN.
Admission Date	Program enrollment date. Shown only on inpatient lines; `--` otherwise.
Discharge Date	Program discharge date. Shown only on inpatient lines; `--` otherwise.
Charge	The service's charge amount, in dollars and cents. This is the amount sent to DHCS.
Submission ID	Which submission file the line went out in. `--` if never sent. With the export permission it is a link that downloads the file again. A line withdrawn out of its file shows the number struck through.
Submission	When that submission file was created. Every line in one file shares it.

Date	

The DHCS record (View)

The **View** link opens *"DHCS Record - Encounter N"*, which lists every DHCS field in two columns: **Would send now (if eligible)** (today's data) and **Last sent**. It says *"Nothing has changed since it was sent."* or *"N field(s) changed since it was sent (highlighted)."*, and lists any errors in today's data. *"Read only - nothing is saved or sent. The SSN shows its last four digits."*

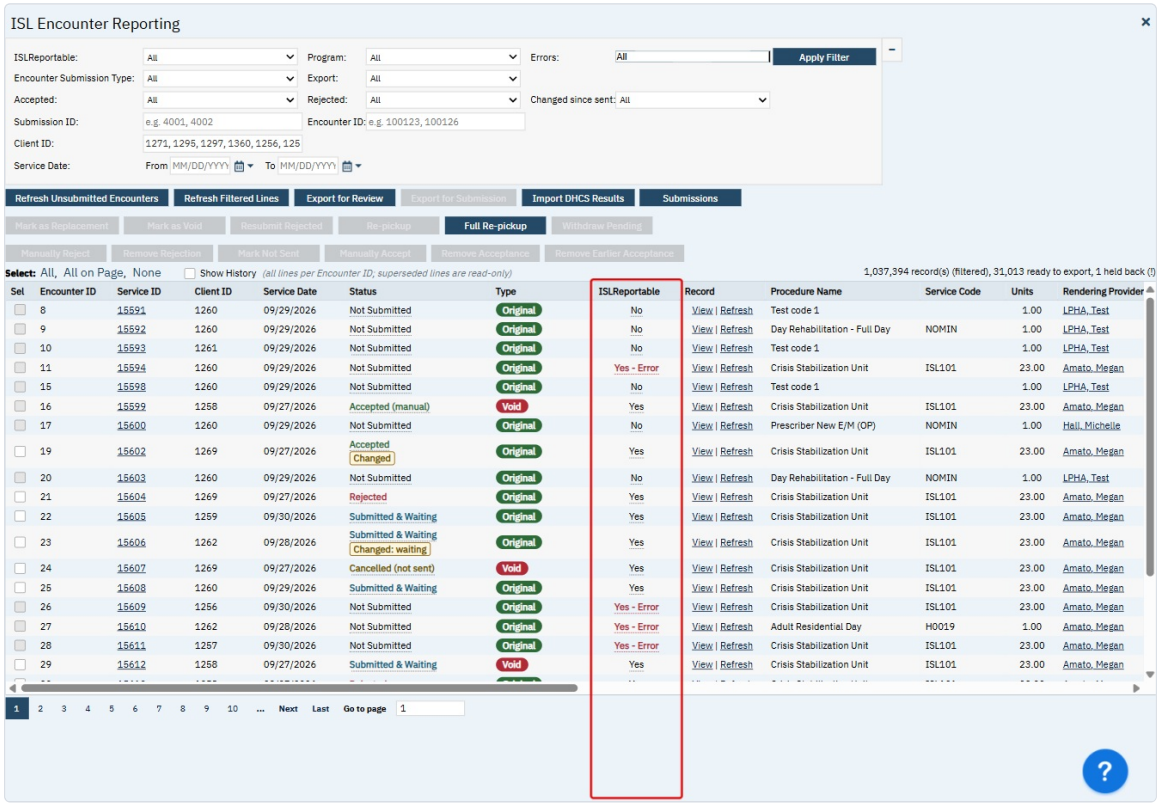


The DHCS record of one line (View): what Export would send now beside what was last sent. The test data is a test client.

Rules

- The grid shows one row per encounter (its current line). Tick **Show History** to see earlier lines too. CalMHSA decision
- Once a line is sent, its values are frozen and never change. CalMHSA decision
- The Charge amount is the service charge, not the balance. CalMHSA decision
- The Insured ID comes from the client's Medi-Cal coverage that is in effect on the date of service, or else the most recent earlier one. Whether a client with no Medi-Cal on the date of service should send a blank CIN is open.
  DHCS ISL Encounter Fields workbook v1.0, "Full ISL Encounter Fields" row 7; DHCS ISL Technical Documentation, p.3 **Open item**

The "ISL Reportable" column



The ISLReportable column: Yes, No or Yes - Error for every line.

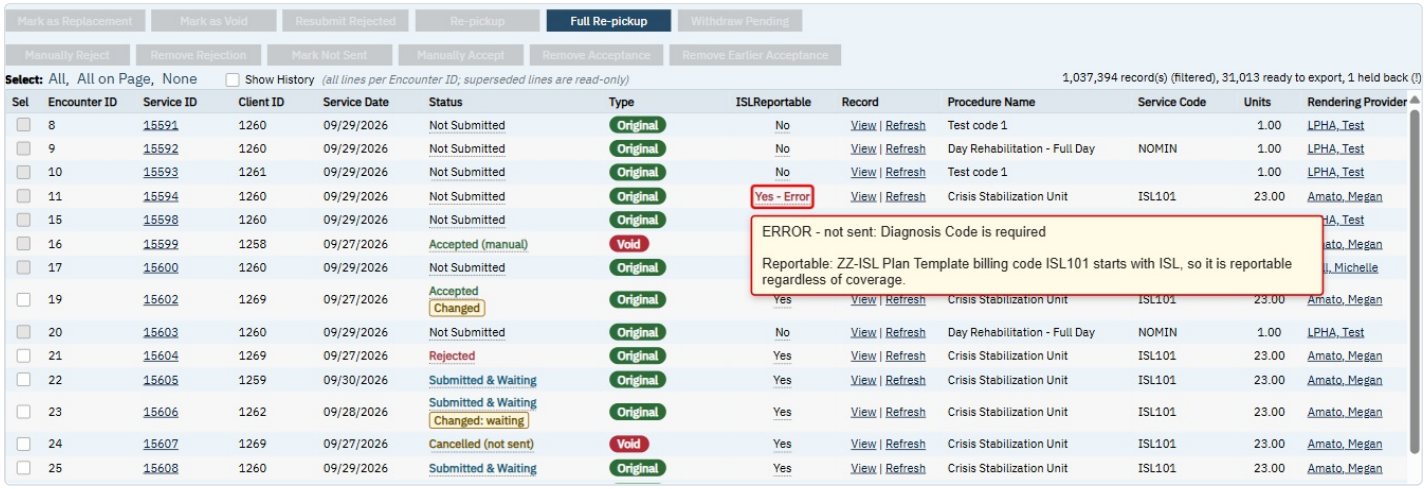
What it shows

Value	Meaning	Can it be sent?
Yes	The line should be reported to DHCS and has everything DHCS requires.	Yes, once selected and exported.
No	The line is not ISL reportable. It stays on the grid so you can see why.	No (except a pending Void, see Line states).
Yes - Error (red)	The line should be reported, but some information DHCS requires is missing or in the wrong format.	Not as a new line, Replacement or resubmission until the data is fixed and the line rechecked. See Required-field errors.

The hover text

Point at the value (it has a dotted underline) to read why. The text names the rule that decided the line (rules A to D, see Reportability rules). Typical wording:

- *"Reportable: ZZ-ISL Plan Template billing code ISL… starts with ISL, so it is reportable regardless of coverage."* (rule A)
- *"Reportable: in the ZZ-ISL Plan Template as … (not an ISL code), and the service has no Medi-Cal charge."* (rule B)
- *"Reportable: not in the ZZ-ISL Plan Template, but the procedure's DisplayAs (…) starts with ISL."* (rule C)
- *"Reportable: this line's charge has no coverage plan (self-pay)."* or *"… is Denied with allowed denial reason …."* (rule D)
- *"Not reportable: …"* followed by the reason, for example *"no dollar amount on the service (charge is $0)"*. When a rule matched but an exclusion turned it off, the text reads *"Not reportable: [exclusion]. (Otherwise rule B: …)"*.
- For rules C and D the text ends with the billing code and the procedure rate it came from, for example *"Billing code … from ProcedureRateId … (plan name)."*, or says no matching rate was found.
- If the template rate used was not in effect on the date of service, it adds *"NOTE: the matched ZZ-ISL Plan Template rate is NOT effective on this service date - the most recent rate for the code was used."*
- For *Yes - Error* on a line not yet sent, the hover starts with *"ERROR - not sent:"* and lists every problem, separated by semicolons, then the reason text. On a line already sent it starts *"ERROR in current data (this line was already sent; fix the data and refresh the row (its Refresh link or Refresh Filtered Lines) before Mark as Replacement or Resubmit - Void and the manual verdicts are still allowed):"*
- On a line that has been exported, the text is *"Frozen at export. The reportability shown is the value submitted to DHCS; the live rule may have changed since."* It stays so after the line is marked Not Sent out of its file. A line never exported shows its live reason.

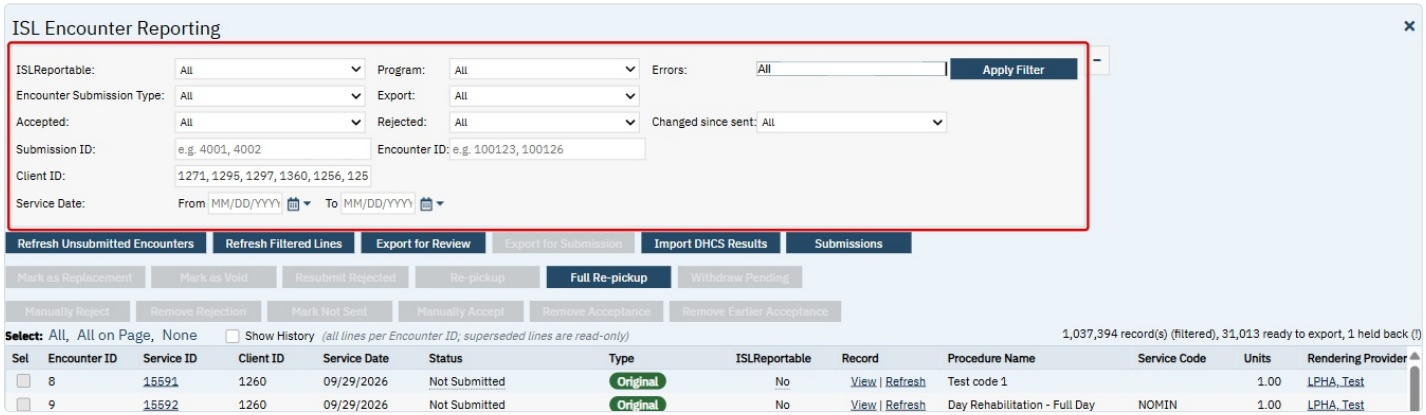


Pointing at a value shows why. The yellow box shows the hover text of a Yes - Error line (drawn into the picture, because a screenshot cannot capture a hover).

Rules

- Every line carries a plain-language reason for its verdict. CalMHSA decision
- A reportable line missing any DHCS required field reads *Yes - Error* and is never exported as a new line, Replacement or resubmission. CalMHSA decision
- The value is recalculated by Refresh (see Refresh) and when a line is marked as Replacement. It is never recalculated for a line already sent. CalMHSA decision

Filters



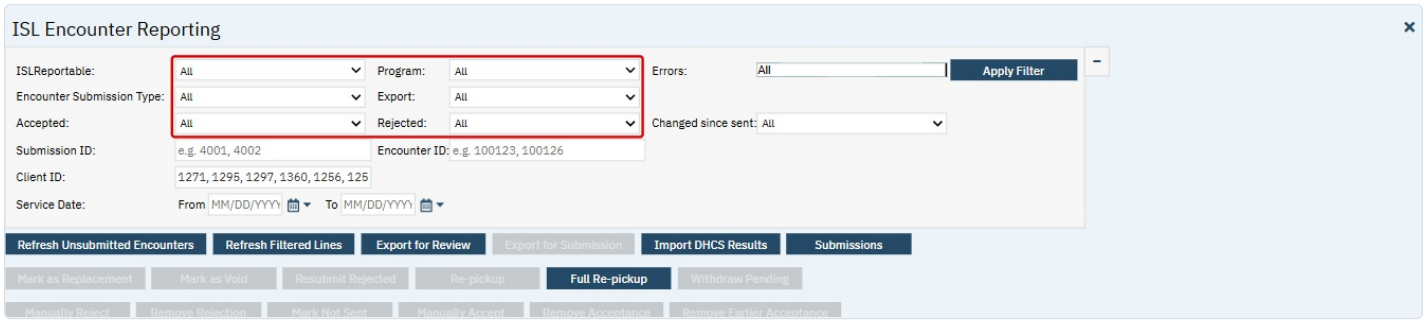
The filter box. Set the filters, then click Apply Filter.

What it shows

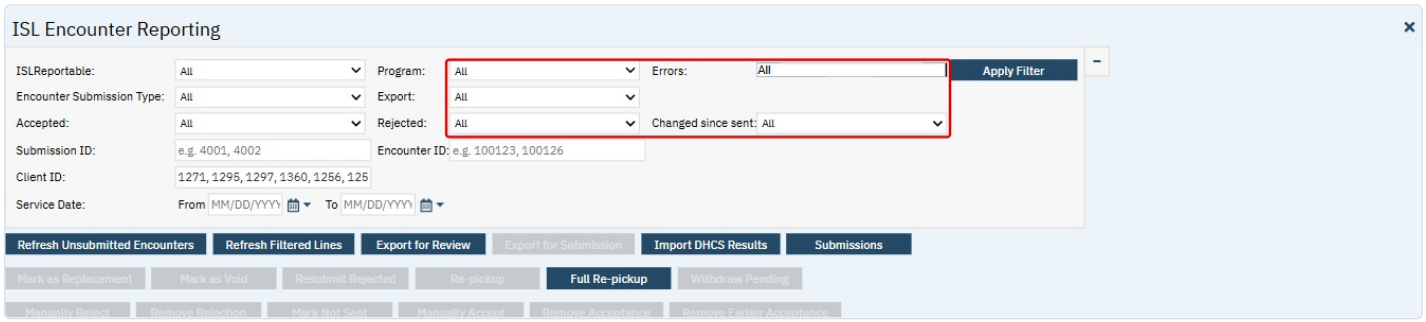
The filter box sits above the grid. Change any filter, then click **Apply Filter**. In the three ID boxes you can also press Enter. All filters work together: a line must match every filter that is set. The screen remembers the filters you applied, for you, in this browser tab.

Filter	Choices	How it matches
ISLReportable	All, Reportable Only, Reportable - no errors, Not Reportable Only, Reportable - with errors	"Reportable Only" includes lines in error. "Reportable - no errors" shows only plain *Yes* lines. "Reportable - with errors" shows every line that has an error.
Program	All, plus every program that appears in the data	Exact program name. The list is built from the lines in the data when the screen opens and after a Refresh.
Errors	A list of the error types in the data, each with its count; tick one or more	A line matches if it has any of the ticked error types. With no errors in the data it reads *"No row has an error."*
Encounter Submission	All, Not Submitted, Submitted & Waiting, Original, Replacement, Void	Where the line is in its life, not the Type column: "Original" here leaves out Original lines still waiting for an answer.

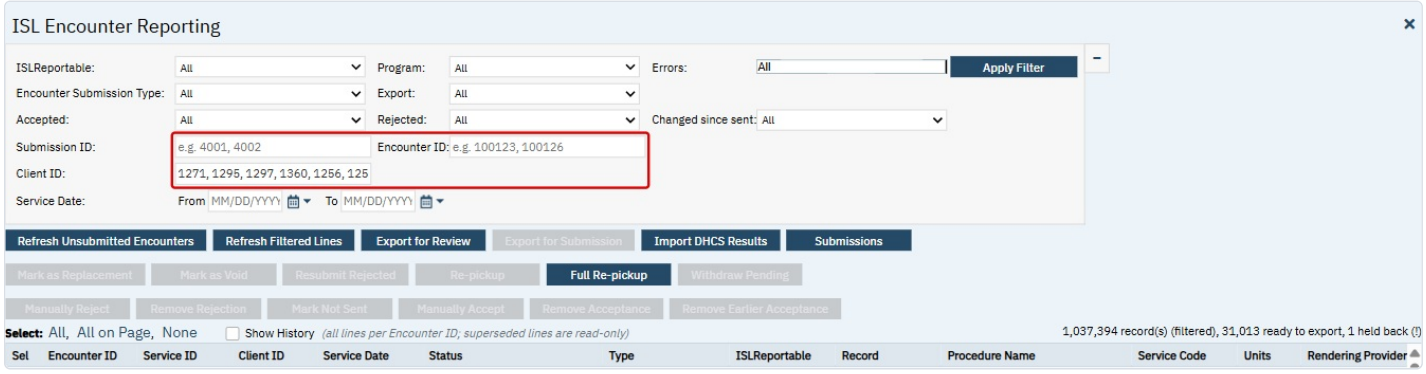
Type		
Export	All, Ready to export, Held back (!)	"Held back (!)" lists lines that look ready but that Export for Submission would refuse. See Selecting lines.
Accepted	All, Accepted Only, Not Accepted, Awaiting Response	"Awaiting Response" is sent lines with no answer yet; "Not Accepted" is lines DHCS answered without accepting.
Rejected	All, Rejected Only, Not Rejected	Includes both DHCS rejections and rejections recorded by hand.
Changed since sent	All, Any change, Replacement suggested, Replacement - needs confirmation, Void suggested, Inpatient - review by hand, Waiting for DHCS, Reportable again (Re-pickup)	Sent lines whose data changed since they were sent, by what is suggested. See Refresh and Full Re-pickup.
Submission ID	Free text	One ID, or several separated by commas (for example `4001, 4002`). Each ID must match **exactly**: `100123` does not find `1001234`. A line matches if it has any of the listed IDs. Submission ID never matches a line that has not been sent.
Encounter ID	Free text	
Client ID	Free text	
Service Date From / To	Dates (MM/DD/YYYY) or the calendar icon	Both dates are included. You can fill in only one of them.



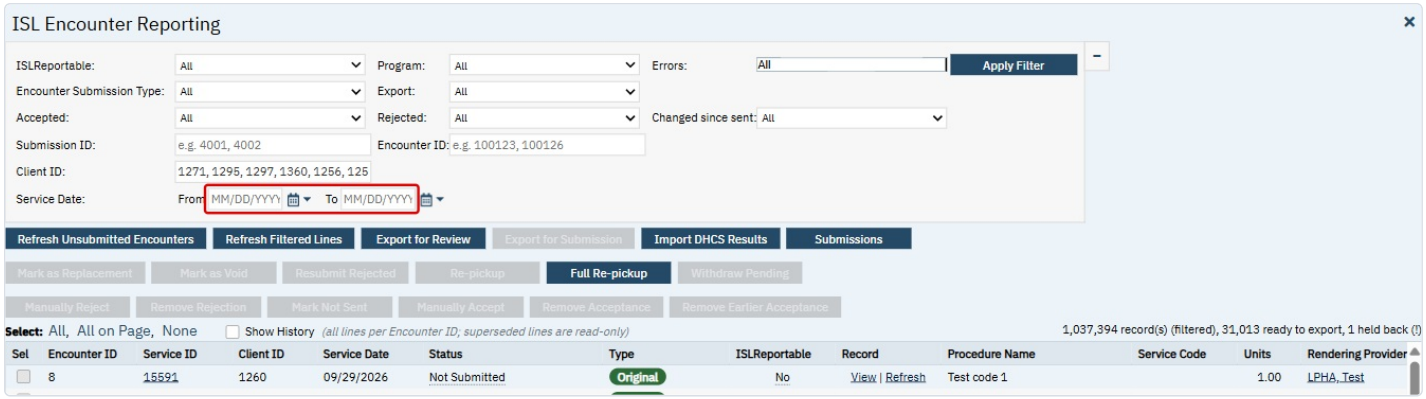
Five of the drop-down filters: ISLReportable, Program, Encounter Submission Type, Accepted and Rejected. The Errors, Export and Changed since sent filters sit beside them.



The Errors, Export and Changed since sent filters.



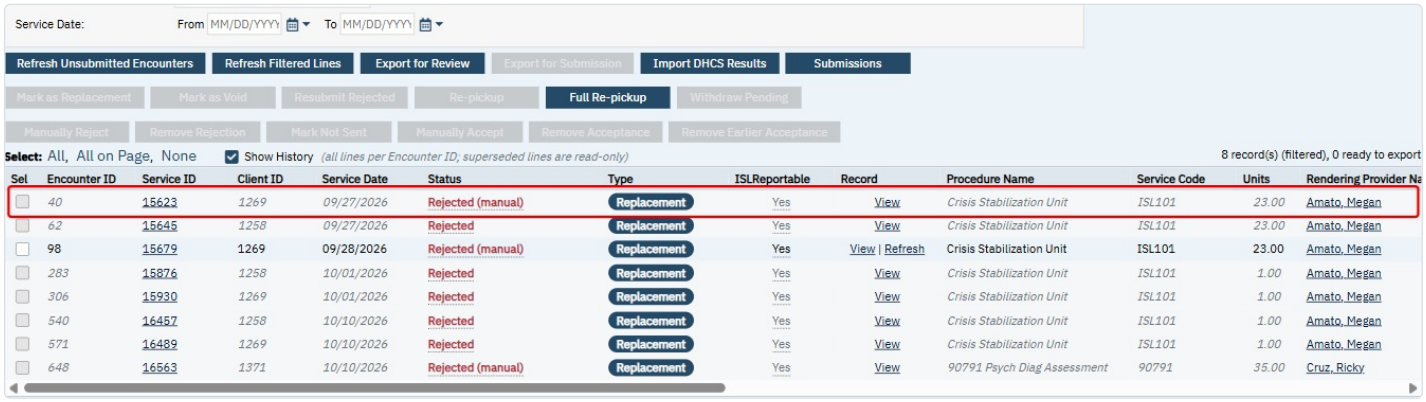
The Submission ID, Encounter ID and Client ID boxes. Each takes one ID or a comma-separated list.



Service Date From and To.

How to use it

- The chip at the top right of the filter box hides all but the first row of filters, and shows them again. Hidden filters still apply. While the box is collapsed and a hidden filter is set, a yellow **Filters applied** note appears beside it.
- If nothing matches, the grid reads *"No encounters to display."* and the status line reads *"No encounters match the current filters."*
- **Show History** (next to the Select links, above the grid, with the note *"(all lines per Encounter ID; superseded lines are read-only)"*) adds every earlier line of each encounter. Earlier lines are greyed and in italics and cannot be selected. Ticking or unticking it clears your selection and reloads the grid. It is remembered with the filters.

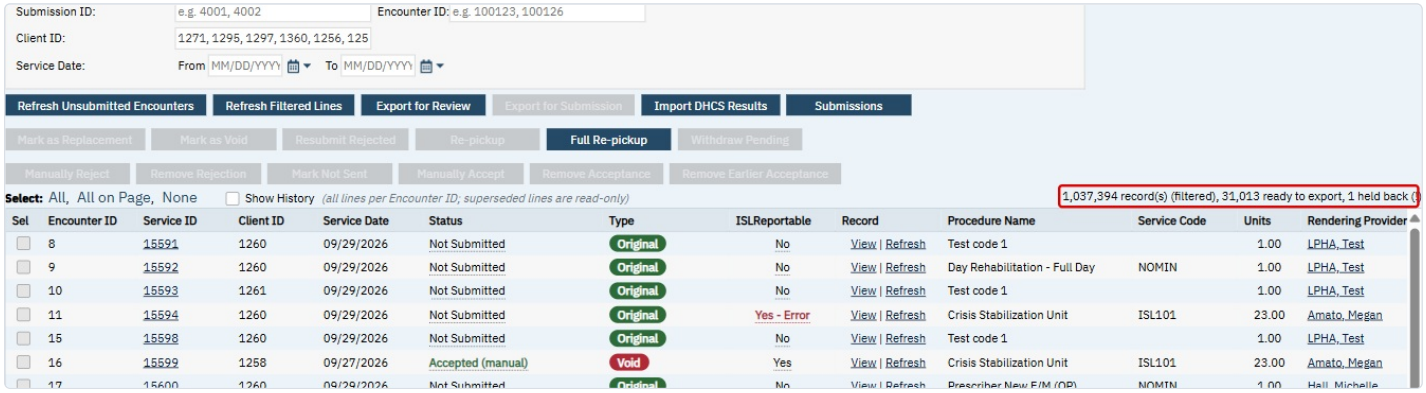


Show History ticked: an earlier line of an encounter (boxed) has its text in grey italics and cannot be selected. Its status badge, a green or red Yes, and its Submission ID link keep their own colour.

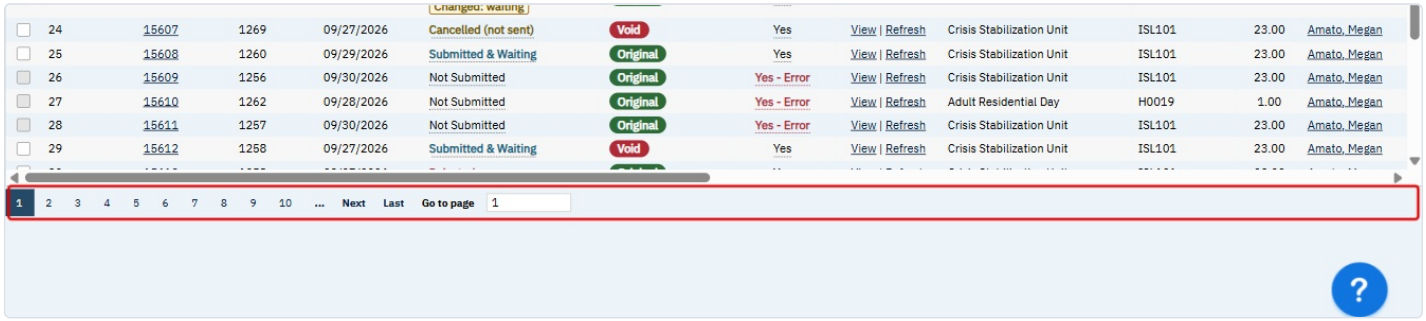
Rules

- Submission ID, Encounter ID and Client ID take a comma-separated list and match each ID exactly. CalMHSA decision
- The Program list comes from the data, not a fixed list. CalMHSA decision
- The Accepted filter has three answers so that "no answer yet" is never shown as "not accepted". CalMHSA decision
- "Reportable - with errors" lists lines in error. CalMHSA decision

Paging and the record count



The record count line: every matching line, how many of them are ready to export, and how many are held back.

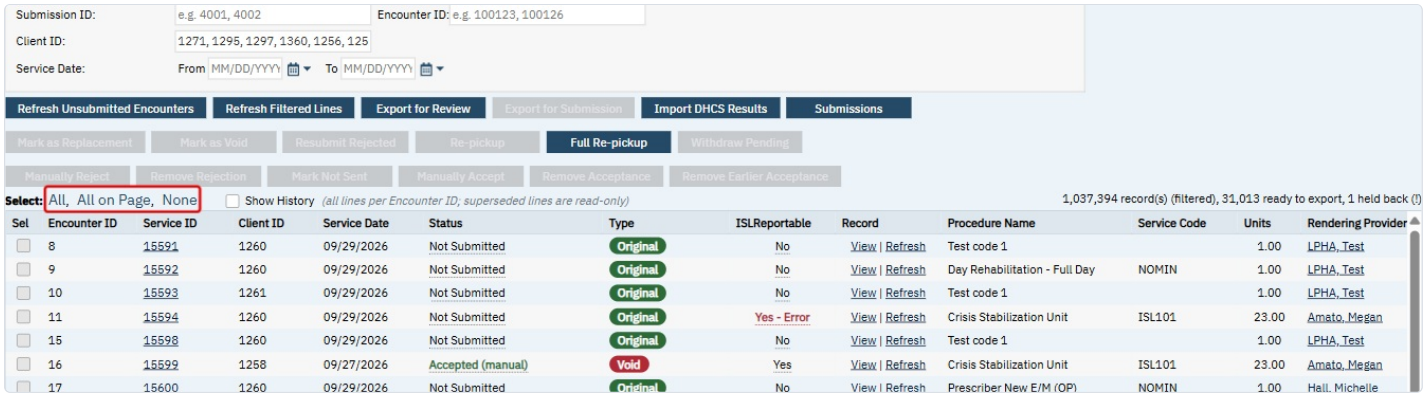


The pager below the grid (25 lines per page): First, Previous, page numbers, Next, Last and a Go to page box.

What it shows

- The grid shows **25 lines per page**. Below it is SmartCare's usual pager: **First**, **Previous**, page numbers in blocks of 10, **Next** and **Last**, with a **Go to page** box (type a page number and press Enter). First and Previous are not shown on page 1, Next and Last not on the last page.
- Above the grid on the right, a line reads, for example, *"18 record(s) (filtered), 17 ready to export, 1 held back (!)"*. The first number is every line that matches the filters, on all pages. "Ready to export" is how many could go into the next Export for Submission. "Held back" appears only when some lines are held back.
- Applying a filter or reloading takes you back to page 1.
- Your ticks are remembered when you move between pages.

Selecting lines: All, All on Page, None



Select: All, All on Page, None.

How to use it

Above the grid on the left is **Select: All, All on Page, None**.

Link	What it does
All	Selects every line ready to export that the filters show, on every page (not yet sent, no errors, not held back). Untick a line to leave it out. Only **Export for Submission** takes "All"; it exports them in files.
All on Page	Ticks every line ready to export on the current page only.
None	Clears every tick on every page.

Rules

- While "All" is on, the other action buttons are greyed out: *""All" is on, and only Export for Submission takes it. Choose None, then tick rows (or use All on Page) for this action."* Applying new filters ends "All".
- To act on sent, accepted, rejected or voided lines (for example Mark as Void), tick each one yourself.
- A greyed-out tick box means no action applies to that line. Hover to see why, for example *"Superseded history line - read-only."* or *"This row is not actionable (not reportable, or DHCS has already responded and no action applies)."*
- **Held back (!)**: a line that looks ready but that Export for Submission would refuse (for example a staged line whose reason no longer holds, or a line waiting on an earlier Void) shows a red **!** and the hover *"Held back - Export for Submission leaves it out under All and refuses it when ticked: [reason]"*. "All" leaves it out; if you tick it by hand you are warned that Export will refuse the whole selection.
- Each action button becomes clickable only when at least one ticked line suits it. Hover a greyed-out button to see what it needs, for example *"Select one or more voided lines to enable."*
- After an action succeeds, all ticks are cleared.

How actions work

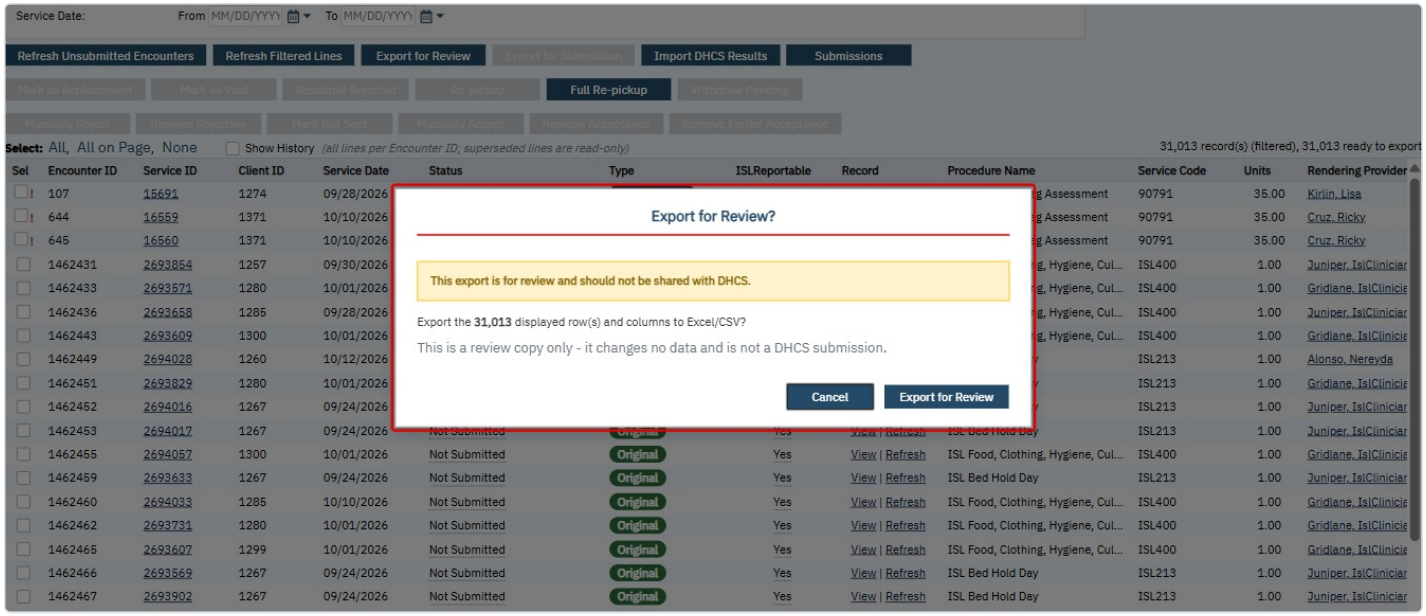
What it shows

The buttons sit above the grid in three rows:

- **Refresh Unsubmitted Encounters**, **Refresh Filtered Lines**, **Export for Review**, **Export for Submission**, **Import DHCS Results**, **Submissions**
- **Mark as Replacement**, **Mark as Void**, **Resubmit Rejected**, **Re-pickup**, **Full Re-pickup**, **Withdraw Pending**
- **Manually Reject**, **Remove Rejection**, **Mark Not Sent**, **Manually Accept**, **Remove Acceptance**, **Remove Earlier Acceptance**

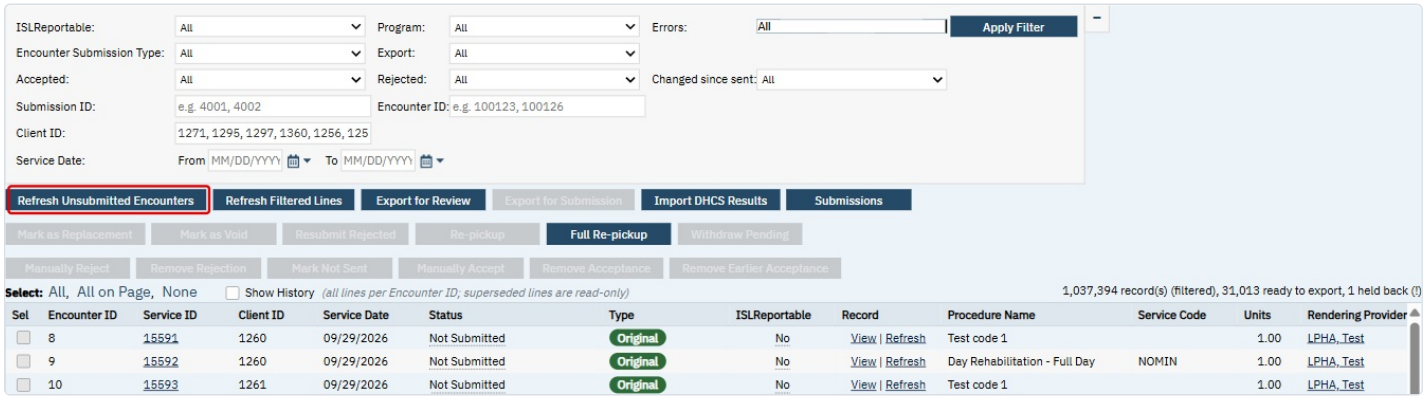
Rules

- The two Refresh buttons run straight away. Submissions opens a list and changes nothing. Every other action asks you to confirm first, and the dialog says how many lines it will change. Mark as Void's confirm button is red because a Void cannot be undone.
- **All or nothing.** SmartCare checks every ticked line again when you confirm. If any line is not eligible, **nothing is changed** and a box titled *"Cannot Complete [action]"* reads *"No rows were changed. The following selected row(s) are not eligible for [action]:"*, lists each Encounter ID with its reason, and ends *"Deselect the ineligible row(s) and try again."* The one exception is **Withdraw Pending**, which withdraws the lines it can and lists the rest (*"Partly Done"*).
- No action takes more than 5,000 lines at a time: *"[action] is limited to 5,000 lines at a time - narrow your selection and try again. (Selected: N lines.) Nothing was changed."*
- The result appears in the status line below the grid (green for success, red for an error, blue while working) and the grid reloads. A success message stays until your next action. A long-running action shows a clock (*"running m:ss"*).
- If your SmartCare session has ended, the action is not carried out: *"Your SmartCare session has ended, so this request was not carried out. Opening the login page..."*
- A line in error (*Yes - Error*) blocks only three things: exporting it as a new line, Replacement or resubmission; **Mark as Replacement**; and **Resubmit Rejected** (except a rejected Void). The refusal reads *"Error - no action allowed: [problems]. Fix the data, then use the row's Refresh link or Refresh Filtered Lines."* Void, the manual verdicts, Mark Not Sent, Withdraw Pending and Re-pickup are still allowed. CalMHSA decision
- Actions also lock every other encounter for the same service and charge while they run, so two people cannot act on the same service at once. Nothing about this shows on screen.

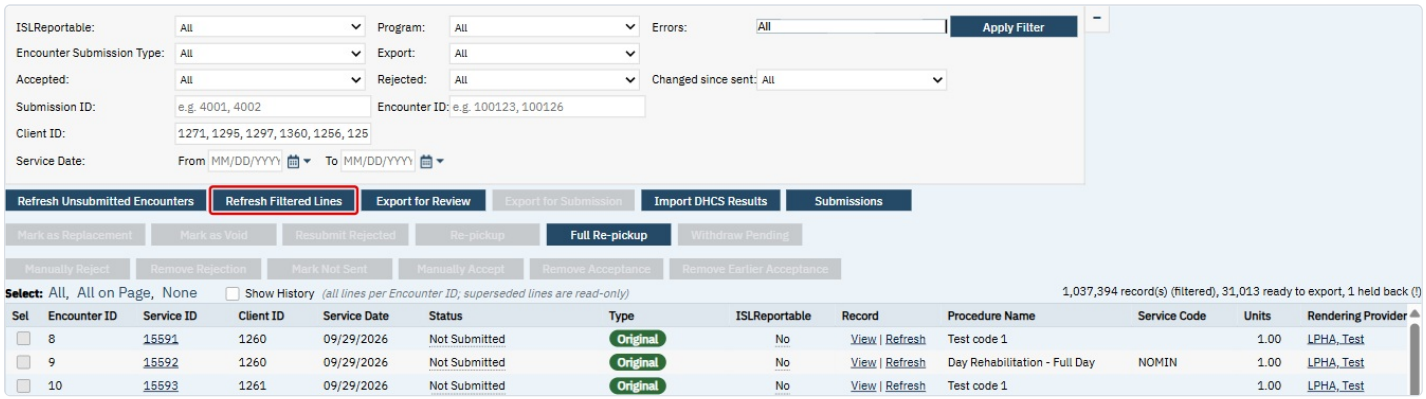


Every action except the two Refresh buttons and Submissions asks you to confirm first. This is the Export for Review dialog.

Refresh



Refresh Unsubmitted Encounters. It starts as soon as you click it; there is no confirmation.



Refresh Filtered Lines. It starts as soon as you click it; there is no confirmation.

What it does

Refresh picks up new completed services (one line per charge), rechecks lines against today's SmartCare data, and compares sent lines with what was sent. There are four ways it runs:

How	What it covers
Refresh Unsubmitted Encounters (button)	Picks up new services and rechecks the lines that are new or changed since the last Refresh: new services, charges, payments and coverage; services from the last 90 days completed or edited since; and clients edited since. Changes to rates, mappings, the reporting start date, programs, procedures, locations, staff or older services wait for the nightly Refresh.
Refresh Filtered Lines (button)	Rechecks every line the filters show (up to 20,000), whatever changed.
A row's **Refresh** link	Rechecks that one line and compares it with what was sent. It picks up nothing new. Status line: *"Encounter N refreshed from today's data."*, plus *"It has changed since it was sent - hover its Status to see what changed and what is suggested."* when it has.
Nightly Refresh	Runs every night at 1:00 AM (server time) and rechecks every line of the last year. It also marks the sent lines that changed data touches, so the next click compares them first.

When the screen is first installed in your system: the Refresh Unsubmitted Encounters button is refused until the nightly Refresh has finished its first full run. Until then, it shows a message beginning *"Refresh cannot tell what is new yet: the first full Refresh has not finished."* In the meantime, use **Refresh Filtered Lines** or a row's **Refresh** link. If the message continues after the first night, contact CalMHSA.

What a recheck changes

- Lines not yet sent: ISL Reportable, its reason and the error list are worked out again.
- Sent lines that are pending, waiting or rejected: the error list is brought up to date. Their ISL Reportable value is never changed.
- Sent lines: compared with today's data (**change detection**). A line whose data changed gets a badge under its Status and appears under the **Changed since sent** filter, with a suggestion (Replacement, Void, review by hand, or Re-pickup when the service is reportable again). Nothing is staged or sent by itself; use Full Re-pickup or the line actions.
- A service or client deleted in SmartCare makes an unsent line *No* (*"Not reportable: the service or client has been deleted in SmartCare."*).

How to use it

Click the button. There is no confirmation. While it runs, the status line shows progress, for example *"Refreshing unsubmitted encounters: N refreshed of M, K left (X new picked up), about N minutes to go, then a check of the sent lines..."* When it finishes it reads *"Unsubmitted encounters refreshed. N new service/charge line(s) picked up; N line(s) new or changed since the last Refresh were checked."*, then how many lines are reportable, a change-detection summary (for example *"Change detection: N sent line(s) checked against today's data - no changes found."*) and how many records are shown. It may add:

- *"N reportable line(s) have ERRORS (a DHCS required field is missing) and will not be sent. Use the ISL Reportable filter "Reportable - with errors" to see them."*
- *"WARNING: N service(s) have MORE THAN ONE reportable charge line. Exporting all of them would send the same delivered service to DHCS more than once - review these before exporting."* The count rises by one for each service whose Medi-Cal line and self-pay line both become reportable.
- *"WARNING: the ISL Template is EMPTY …"* when the ZZ-ISL Plan Template has not been set up.
- *"More sent lines are due for this check than one Refresh takes - Refresh again to continue."*

When it is refused or stops

- Only one Refresh can run at a time, and the nightly Refresh counts: *"Another ISL Refresh is already running. Wait for it to finish, then Refresh again."*
- Before the first nightly Refresh has finished: *"Refresh cannot tell what is new yet: the first full Refresh has not finished. It runs every night at 1:00 AM …"* Use **Refresh Filtered Lines** for the lines you need. If this continues after the first night, contact CalMHSA.
- If it stops part-way, the lines it already checked are kept: *"Refresh did not finish - any lines it already checked are refreshed; run it again. The error is logged."*
- If change detection fails: *"WARNING: change detection could not run (the error is logged), so the Changed flags may be out of date. Refresh again; if it keeps failing, report the time to support."* If it keeps failing, note the time and contact CalMHSA.

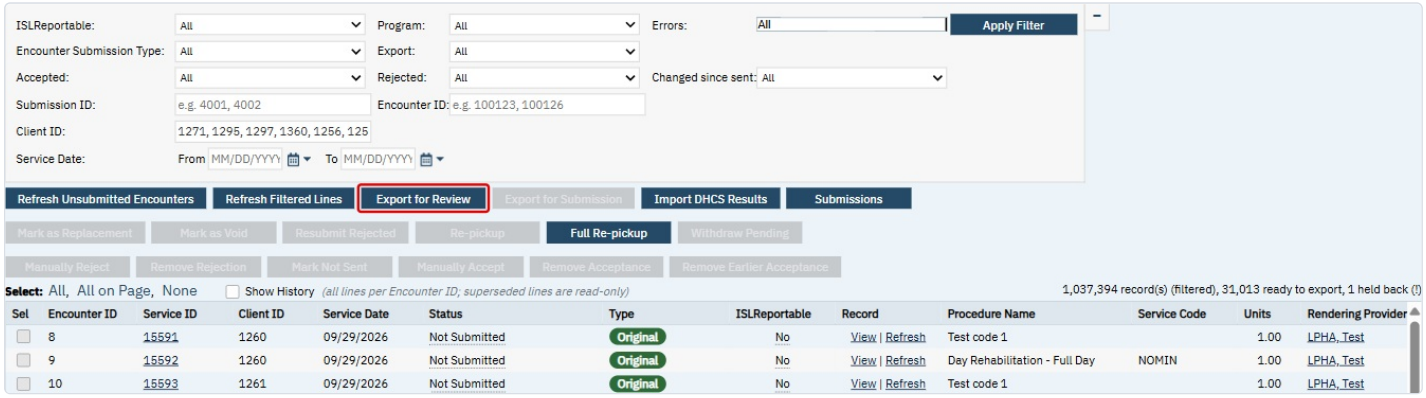
Rules

- Only services with status Complete are picked up. DHCS ISL FAQ (copy of 2026-09-17), p.4
- Refresh picks up services from the last year, never before 07/01/2026. Services dated before the reporting start are picked up and marked *No*. See Configuration settings.
- Reportability is recalculated on Refresh (unsent lines only) and when a line is marked as Replacement. CalMHSA decision
- The screen warns, but does not stop you, when one service has more than one reportable line.
  DHCS ISL Implementation Guide v1.1, p.10 (duplicate checks) **Open item**
- After fixing data, recheck the line with its Refresh link or Refresh Filtered Lines: the button sees only what it can tell has changed.

Can it be undone?

There is nothing to undo. Refresh never changes what was sent, and it can be run again at any time.

Export for Review



Export for Review.

What it does

Downloads a spreadsheet file (`isl_review_YYYYMMDD_HHMMSS.csv`) of the lines on screen for internal checking. It changes no data and is **not** a DHCS submission. The file has the grid's columns plus some detail columns.

How to use it

1. Set and apply your filters.
2. Click **Export for Review**. A dialog warns: *"This export is for review and should not be shared with DHCS."*
3. Click **Export for Review** in the dialog. The file downloads.

When it is refused

If no lines match: *"There are no rows to export for review. Adjust your filters and try again."*

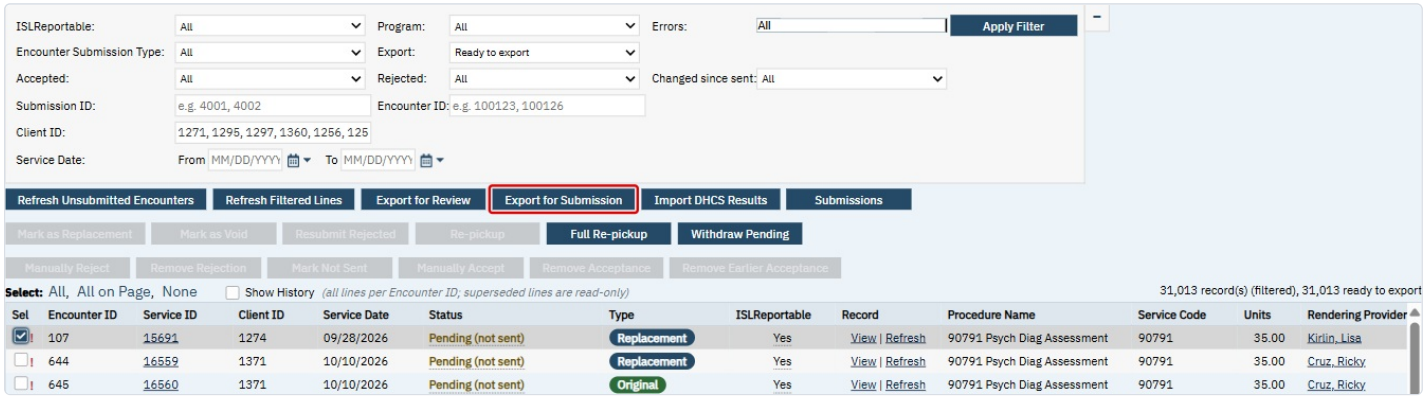
Rules

- Review export changes no data and only the submission export creates a DHCS file. CalMHSA decision
- The file uses the filter boxes as they are when you click the button. If you changed a filter but did not click Apply Filter, the file may not match the grid. Click Apply Filter first. **Open item**

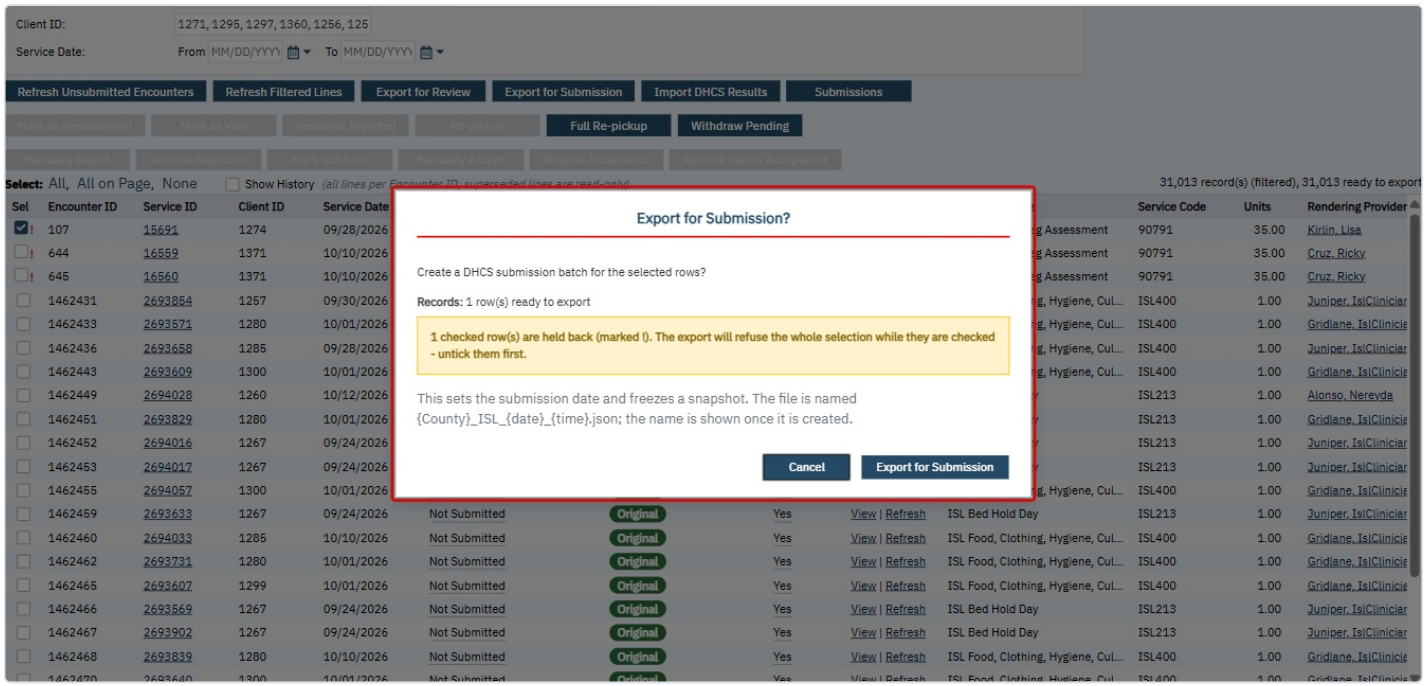
Can it be undone?

Nothing to undo.

Export for Submission



Export for Submission, clickable because a line ready to export is ticked.



The Export for Submission dialog: number of records and a preview file name.

What it does

Creates a **submission** (a new Submission ID) from the selected lines, freezes a copy of every line exactly as sent, sets the Submission Date, and downloads the file for you to upload to the DHCS ISL Portal. The lines move to *Submitted & Waiting*.

When it is allowed

At least one ticked line must be **ready to export**: a line not yet sent, ISL Reportable *Yes*, with no errors and not held back; or a staged Replacement, Void or resubmission. A staged Void can be sent even if the line now has errors.

How to use it

1. Tick the lines, or use **All** to take every ready line the filters show.
2. Click **Export for Submission**. The dialog shows the number of records, any lines not included, and a warning if some are held back.
3. With **All** and more lines than fit in one file, choose *"One file: the first N ready rows"* or *"All of them, in files of up to N lines"*.
4. Click **Export for Submission** in the dialog.
5. The status line reads *"Submission batch created. N record(s) written to [file name]; submission date MM/DD/YYYY. The file will download - upload it to the DHCS ISL Portal."* When several files were made, a *"Submission Files Created"* list gives a link for each file and a link to download them as one ZIP (up to 10 files per ZIP).

6. Save the downloaded file and upload it to the DHCS ISL Portal. See The file that goes to DHCS.

The file is named `[County name]_ISL_[YYYYMMDD]_[HHMMSS].json`, for example `CalMHSA_ISL_20261027_140912.json`. Spaces are removed from the county name. If the county has no name, the county code is used.

When it is refused

- More than 5,000 lines ticked by hand: *"Ticked rows are limited to 5,000 per export - narrow your selection, or use All to export in files. (Selected: N records.)"* With All, the lines go out in files of up to 25,000 lines.
- A file over 50 MB: *"This file would be N MB (N lines), over the 50 MB limit for ISL files. Nothing was exported. …"*
- Any ticked line not eligible: *"Some selected rows are not eligible for Export for Submission. No batch was created."* with a reason per line, for example:
  - *"Error - not sent: [problems]. Fix the data, then use the row's Refresh link or Refresh Filtered Lines."*
  - *"Not selectable - this line has already been submitted. Reload the screen to see its current state."*
  - *"Not selectable - this line is not ISL reportable. Use the row's Refresh link to re-check it."*
  - *"Not sent: the service or client for this encounter no longer exists in SmartCare …"*
  - A line that is no longer reportable now: for a staged line the reason ends *"Use Withdraw Pending to take it back; the line before it becomes current again."*
  - Another encounter for the same service whose Void DHCS has not yet accepted: *"Encounter N for the same service is still active - its Void has not been accepted by DHCS. …"*
  - A staged Replacement or Void whose reason no longer holds (for example its accepted line was later rejected), and a staged Void with no accepted record to repeat: *"This Void line cannot be submitted: [problem] Nothing was sent."*
- If someone else exports at the same second: *"Another export took the same file name a moment ago. Nothing was exported - try again."*

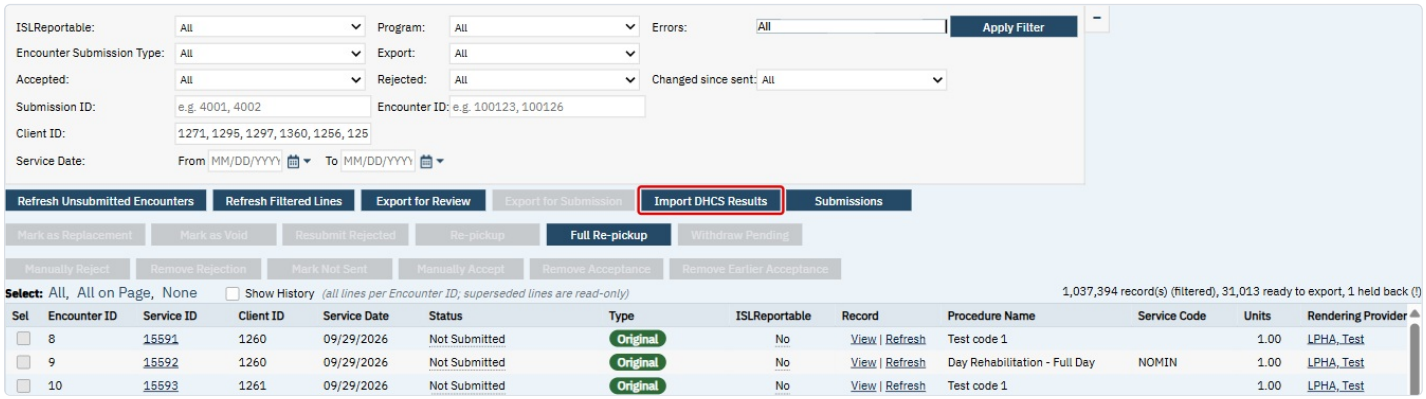
Rules

- Only selected, reportable, unsent, error-free lines are exported; if any selected line is ineligible nothing is exported. CalMHSA decision
- A staged Replacement or Void can be sent even if the line is no longer reportable. CalMHSA decision
- The first submission of an encounter is an Original. DHCS ISL Encounter Fields workbook v1.0, "Full ISL Encounter Fields" row 4
- The file must have a `.json` extension. DHCS ISL Technical Documentation v1.0, p.2
- A file may be no larger than 50 MB. DHCS ISL Implementation Guide v1.1, p.4
- A Replacement and a Void must be sent only for encounters DHCS has accepted. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-22

Can it be undone?

No. Once a submission is created its lines are frozen. If you never uploaded the file, use Mark Not Sent. Otherwise wait for DHCS's answer and use Mark as Replacement or Mark as Void. You can download a file again from the grid's Submission ID link or from Submissions.

Import DHCS Results



Import DHCS Results. Clicking it opens a window to choose the Encounters List downloaded from the ISL Portal.

What it does

Reads the **Encounters List** file you download from the DHCS ISL Portal (CSV or JSON) and records, line by line, whether each encounter was **Accepted**, **Accepted with warnings** or **Rejected**. One file can answer several submissions. Each row is matched by its submission file name and Encounter ID; rows for files this screen did not export are skipped and listed. Lines the file does not mention stay *Submitted & Waiting*.

How to use it

1. Click **Import DHCS Results** and choose the file.
2. A **preview** shows what the file would change, without changing anything: how many rows were read, how many of your lines they answer, and how many are accepted, accepted with warnings, rejected, or already recorded.
3. Click **Import N Verdict(s)** (or **Record Import** when nothing new would be recorded).
4. The status line reads *"Import applied: N row(s) matched N line(s). N got a DHCS verdict (N accepted, N accepted with warnings, N rejected); N already had it."*
5. The screen may then offer to withdraw staged lines the import made invalid, or to resubmit lines as Originals where DHCS holds nothing accepted.

When it is refused

Nothing is imported if any of these is true. The message says which.

- The file is over 3 MB (the browser compresses it first), over 64 MB unpacked, or has more than 200,000 rows.
- The file lacks the columns `Encounter_ID`, `Submission File Name` and `Status`.
- It is the old test response format: *"That is the old test response format, which DHCS never produces, so nothing was imported."*
- *"Import Refused"*: rows that name one of your submissions do not match what this screen exported (an Encounter ID the file never held, a value such as the submission type, county, date of service or procedure code that differs, an upload date before the export, an unknown status, or both accepted and rejected rows for one unanswered line).
- *"Nothing to Import"*: no row is for a file this screen exported.
- If the data changed between the preview and your click, the import stops; open the preview again.

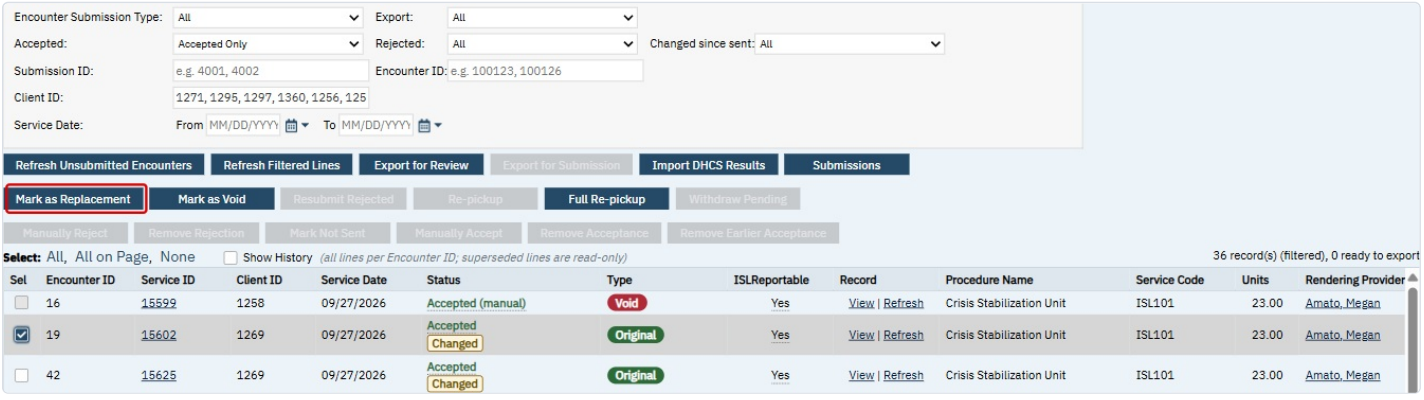
Rules

- DHCS gives each encounter one of three results: Accepted, Accepted with Warning, or Rejected. A line with any rejected row is Rejected; otherwise one with a warning is Accepted with warnings. DHCS ISL Implementation Guide v1.0, p.3
- A line the file does not mention is treated as "no answer yet", never as accepted. CalMHSA decision
- A DHCS result in the file replaces any Manually Accept, Manually Reject or Mark Not Sent recorded on that line. CalMHSA decision A result that contradicts one already recorded from DHCS is kept and listed.
- You can import more than once for the same submission. Importing the same file again records nothing new (everything shows as already recorded).
- A row for a line that was marked Not Sent and withdrawn records nothing for that line, but marks its file as answered, because the file did reach DHCS. The preview warns that DHCS may hold a line the screen no longer shows: check those in the ISL Portal.
- An "Accepted with warnings" line reads *Accepted with warnings* in the Status column, and the hover shows the warning.

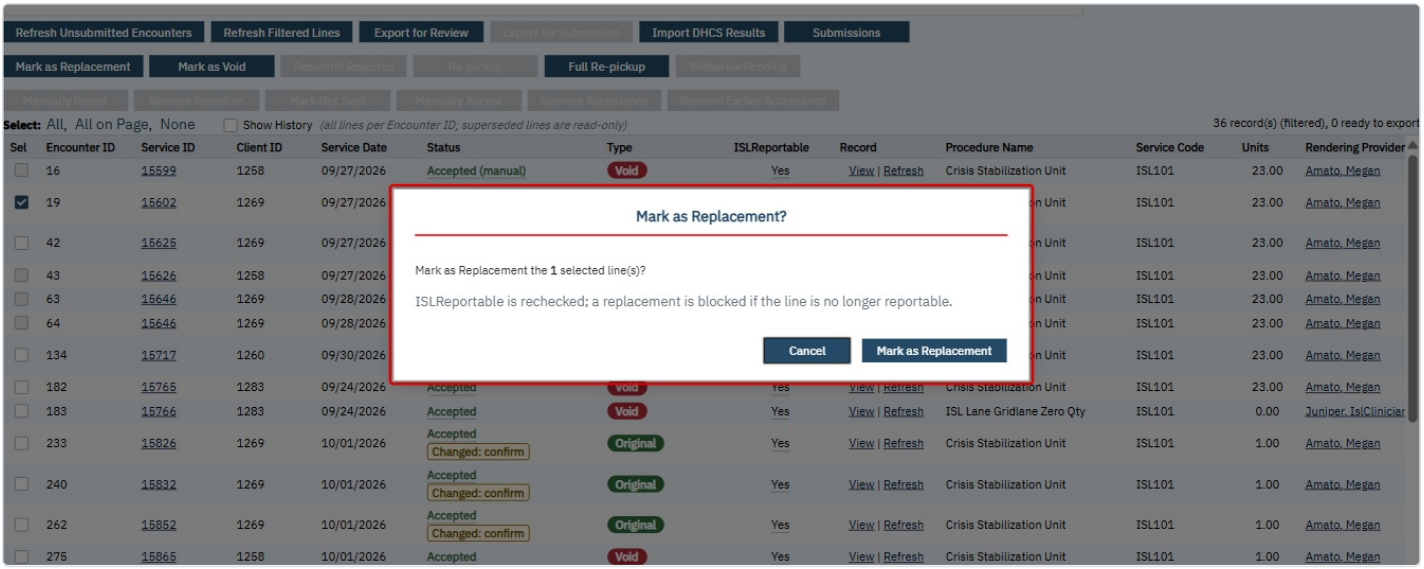
Can it be undone?

No, not from this screen. A result imported from DHCS cannot be removed with Remove Acceptance or Remove Rejection.

Mark as Replacement



Mark as Replacement, clickable because an accepted line is ticked.



The Mark as Replacement dialog.

What it does

Prepares a corrected version of an accepted encounter. It adds a new line under the **same Encounter ID** with Status *Pending (not sent)* and Type *Replacement*. The accepted line becomes history. When you export it, the Replacement is built from **today's** SmartCare data.

When it is allowed

- The line is an accepted Original or Replacement.
- The line is still ISL reportable. SmartCare rechecks this against today's data first.
- The line has no errors.
- DHCS has not accepted an earlier Void of the encounter.

How to use it

1. Fix the data in SmartCare first (for example the diagnosis or the client's address).
2. Tick the accepted line and click **Mark as Replacement**, then confirm.
3. Status line: *"N line(s) marked as Replacement. Export for Submission to send them to DHCS."*
4. Tick the new pending line and use **Export for Submission**.

For many changed lines at once, use Full Re-pickup.

When it is refused

- *"This encounter has been voided. Void is terminal - use Re-pickup to report the service again."*
- *"DHCS has accepted an earlier Void of this encounter, so it is voided at DHCS and nothing more may be sent under its Encounter ID. Raise it with the ISL owner."*
- *"Only accepted Original/Replacement lines can be marked Replacement."*
- *"No longer ISL reportable - the data has changed since it was last checked, so this line must not be sent to DHCS. …"* The message suggests Mark as Void.
- *"Error - no action allowed: [problems]. Fix the data, then use the row's Refresh link or Refresh Filtered Lines."*
- *"The service or client for this encounter has been deleted in SmartCare, so there is nothing to send. If DHCS accepted it, use Mark as Void instead."*
- *"Another encounter for the same service (N) may still be held by DHCS, so this one cannot be sent again until that one is voided."*

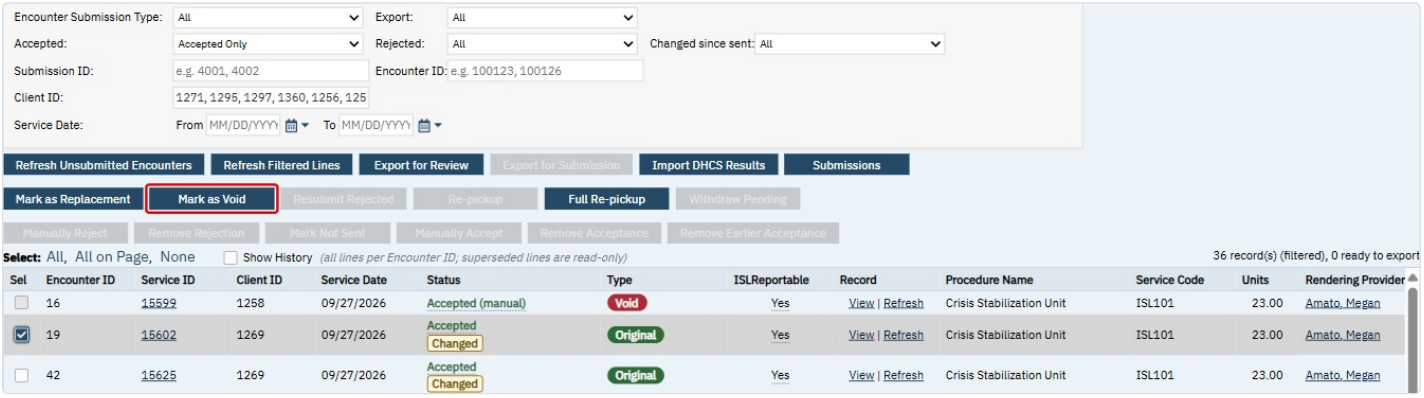
Rules

- A Replacement keeps the same Encounter ID and applies only to accepted encounters. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-22; DHCS ISL Implementation Guide v1.0, p.5
- No Replacement after a Void. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-21
- A Replacement is allowed only while the encounter is still reportable. CalMHSA decision

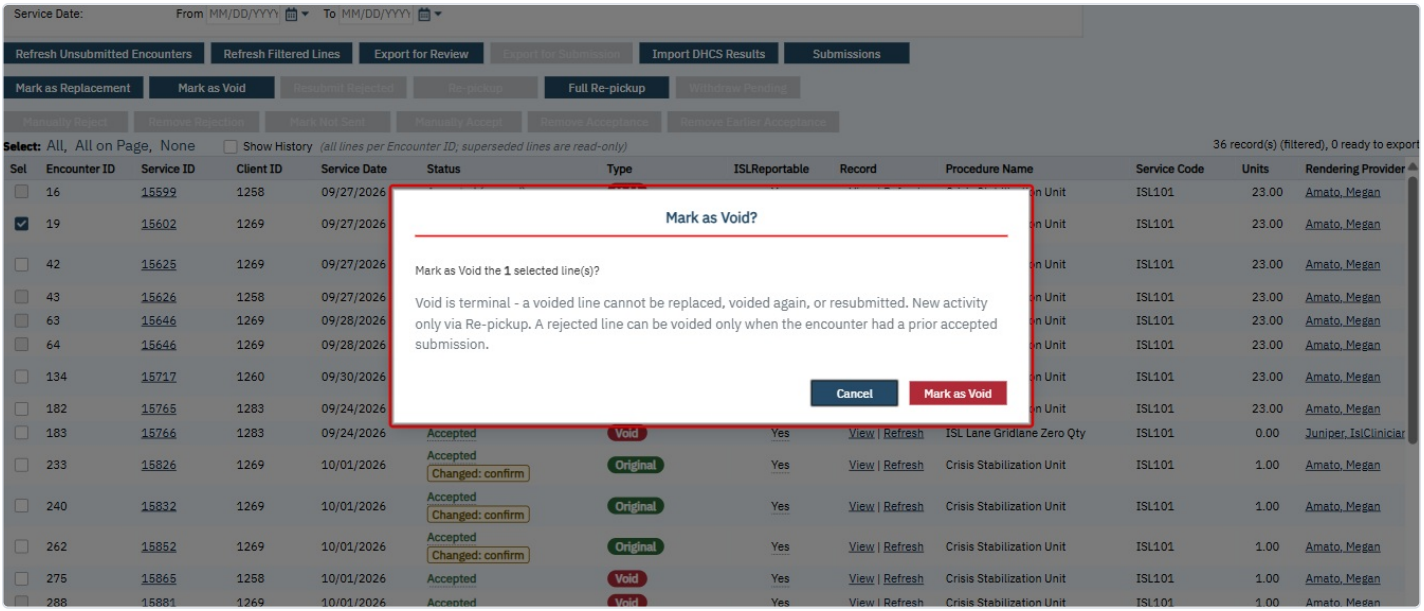
Can it be undone?

Yes, before it is exported: tick the pending line and use Withdraw Pending. The accepted line becomes current again.

Mark as Void



Mark as Void, clickable because an accepted line is ticked.



The Mark as Void dialog. Its confirm button is red because a Void cannot be undone.

What it does

Prepares a withdrawal of an encounter DHCS accepted. It adds a new line under the same Encounter ID with Status *Pending (not sent)* and Type *Void*. When exported, the Void repeats the record DHCS accepted, with only the submission type changed to Void.

When it is allowed

- The line is accepted (Original or Replacement), **or**
- The line was rejected but the encounter has an earlier accepted line (for example a rejected Replacement of an accepted Original).
- The line is not itself a Void, and DHCS has not accepted an earlier Void of the encounter.
- Errors on the line do **not** block a Void.

How to use it

Tick the line, click **Mark as Void**, read the warning (*"Void is terminal - a voided line cannot be replaced, voided again, or resubmitted. New activity only via Re-pickup. …"*) and click the red **Mark as Void** button. Status line: *"N line(s) marked as Void. Export for Submission to send them to DHCS."* Then export the pending Void line.

When it is refused

- *"Void applies only to accepted lines, or rejected lines with a prior accepted submission."*
- *"This line is itself a Void, and a Void is never voided again."* (with *"Use Resubmit Rejected to send it again."* when that is possible)
- *"DHCS has already accepted an earlier Void of this encounter - it is voided at DHCS. Raise it with the ISL owner."*
- *"Cannot be voided: [problem] Raise it with the ISL owner."* when no accepted record is on file to repeat.

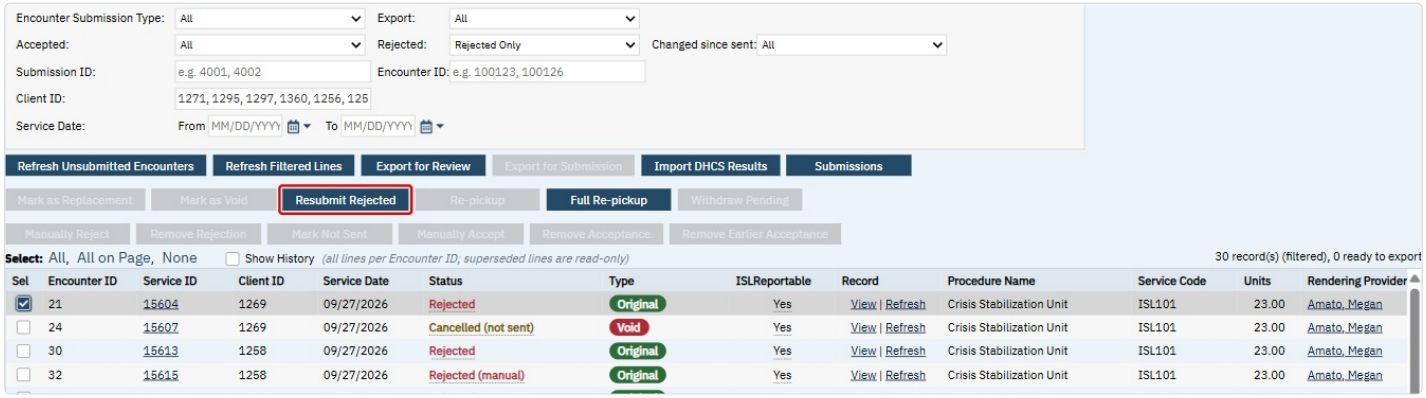
Rules

- A Void must be identical to the accepted encounter, with the same Encounter ID and type Void. DHCS ISL Encounter Reporting Guidance v1.0, p.21
- A rejected encounter that was never accepted cannot be voided; correct it and resubmit it as an Original. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-21; CalMHSA decision
- Void is final. After DHCS accepts a Void, the only action left is Re-pickup. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-21
- If a client later gets Medi-Cal back-dated over a reported service, the ISL encounter must be voided. DHCS ISL Encounter Reporting Guidance v1.0, p.4
  Change detection flags such lines as *Void suggested* under **Changed since sent**; nothing is voided by itself.
- A Void repeats the county code DHCS accepted, even if that code is now treated as invalid (for example `00`). **Open item**

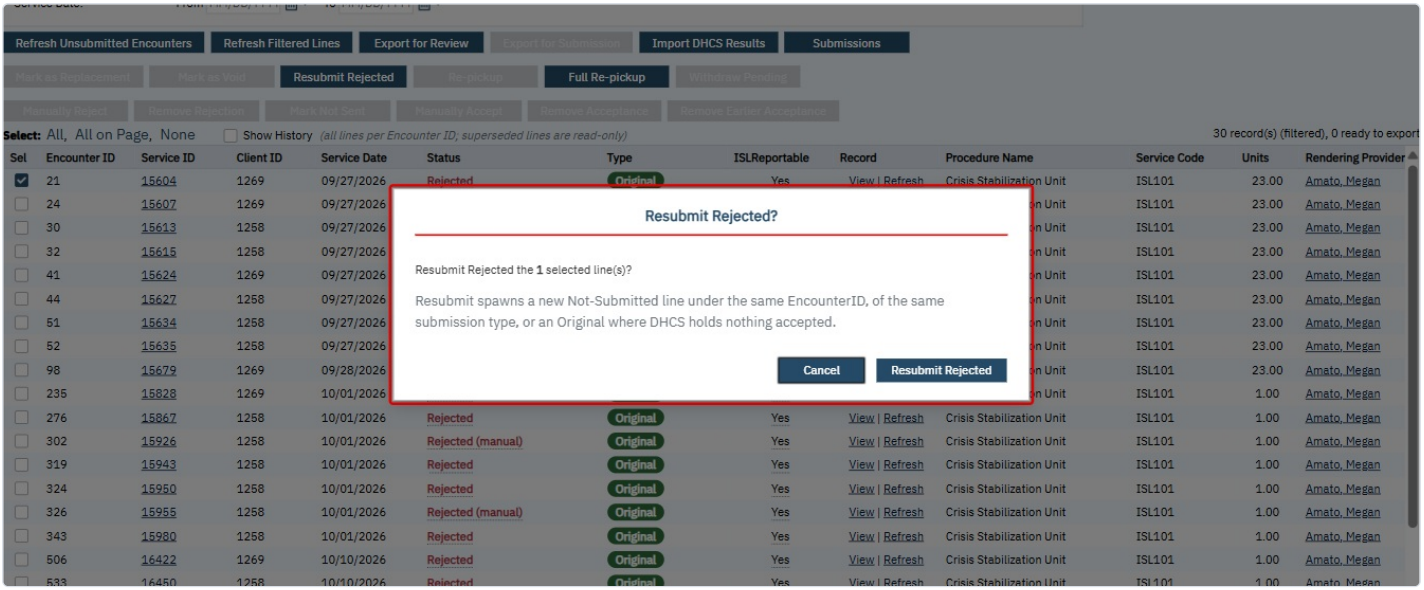
Can it be undone?

Before it is exported, yes: use Withdraw Pending. Once DHCS accepts it, **no**: the encounter is closed for good.

Resubmit Rejected



Resubmit Rejected, clickable because a rejected line is ticked.



The Resubmit Rejected dialog.

What it does

Prepares a rejected line to be sent again. It adds a new unsent line under the **same Encounter ID**. It keeps the same type, except that a rejected Replacement or Void with nothing accepted before it is resent as an **Original**, because DHCS holds nothing to replace or void. The dialog lists each line that changes type, and its note reads *"Resubmit spawns a new Not-Submitted line under the same EncounterID, of the same submission type, or an Original where DHCS holds nothing accepted."* The new line is built from today's data when you export it.

When it is allowed

The line is rejected (Status *Rejected*, *Rejected (manual)* or *Cancelled (not sent)*) and has no errors. A rejected Void can be resubmitted even with errors.

How to use it

1. Read the rejection reason (hover the Status) and fix the data in SmartCare.
2. If the line showed an error, recheck it with its **Refresh** link or **Refresh Filtered Lines**.
3. Tick the rejected line and click **Resubmit Rejected**. Status line: *"N rejected line(s) resubmitted: a new Not-Submitted line was created under the same EncounterID - the same submission type, or an Original where DHCS holds nothing accepted. Export for Submission to send it."*
4. Export the new line with Export for Submission.

When it is refused

- *"Resubmit applies only to rejected lines."*
- *"DHCS has since accepted an earlier submission of this encounter, so a resubmitted Original would report it twice. Use Mark as Void if it should be withdrawn from DHCS."*
- *"DHCS has already accepted an earlier Void of this encounter, so it is voided at DHCS and nothing more may be sent under its Encounter ID."* The line's hover then says to use Re-pickup if the service should be reported again.
- The error, deleted service or client, another encounter for the same service, and no-longer-reportable refusals, as for Mark as Replacement.

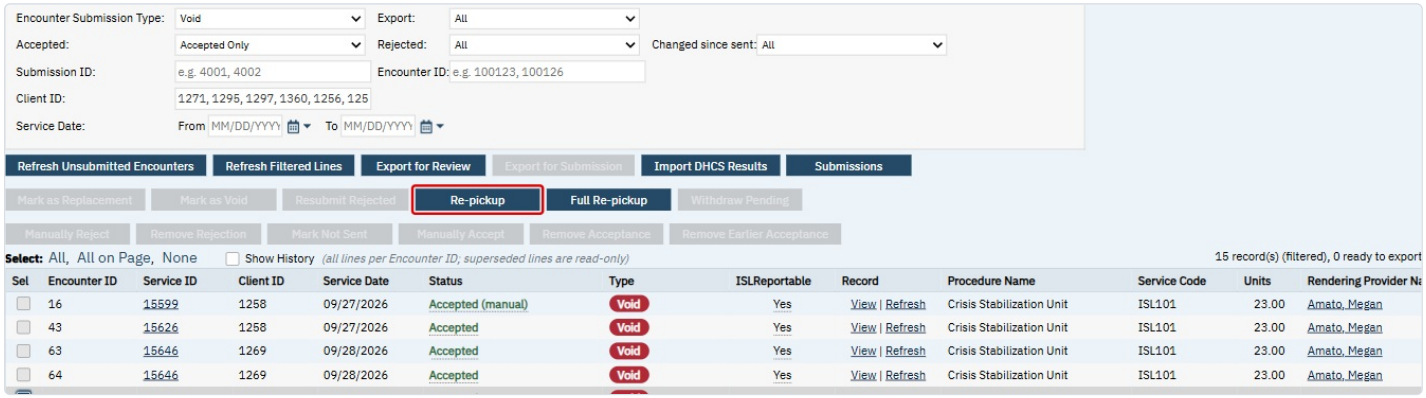
Rules

- A rejected first-time submission is corrected and resubmitted as an Original. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-21
- Resubmitting is a two-step action (Resubmit, then Export). CalMHSA decision

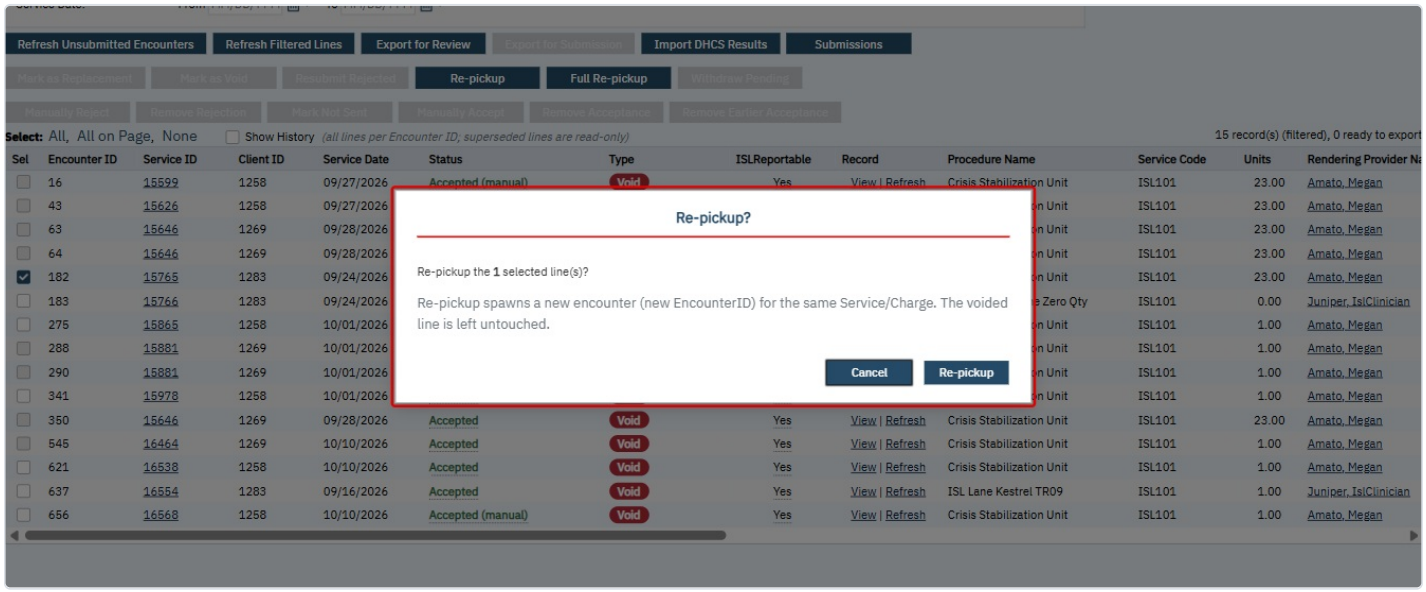
Can it be undone?

Before it is exported, use Withdraw Pending. Once you resubmit a manually rejected line, Remove Rejection is no longer offered for it.

Re-pickup



Re-pickup, clickable because a voided line is ticked.



The Re-pickup dialog.

What it does

For a voided encounter, creates a **brand-new encounter with a new Encounter ID** for the same service and charge, so the service can be reported again. The voided encounter is left as it is. The new line's reportability and errors are worked out straight away.

When it is allowed

The line is **voided** (a Void that DHCS accepted), or it is a rejected line of an encounter whose earlier Void DHCS accepted. Errors do not block it. Only the newest encounter for a service and charge can be re-picked up, and only while no other encounter for it is active.

How to use it

Tick the voided line, click **Re-pickup** and confirm. Status line: *"N voided line(s) re-picked up: a new encounter (new EncounterID) was created for the same Service/Charge."* Change detection also suggests a Re-pickup (*Reportable again*) when a voided service becomes reportable again; see Full Re-pickup.

When it is refused

- *"Re-pickup applies only to voided lines."*
- *"This encounter has already been re-picked up; only the newest encounter for the same Service/Charge can be re-picked up. Nothing was created."*
- *"Another encounter for the same Service/Charge is still active. Nothing was created."*

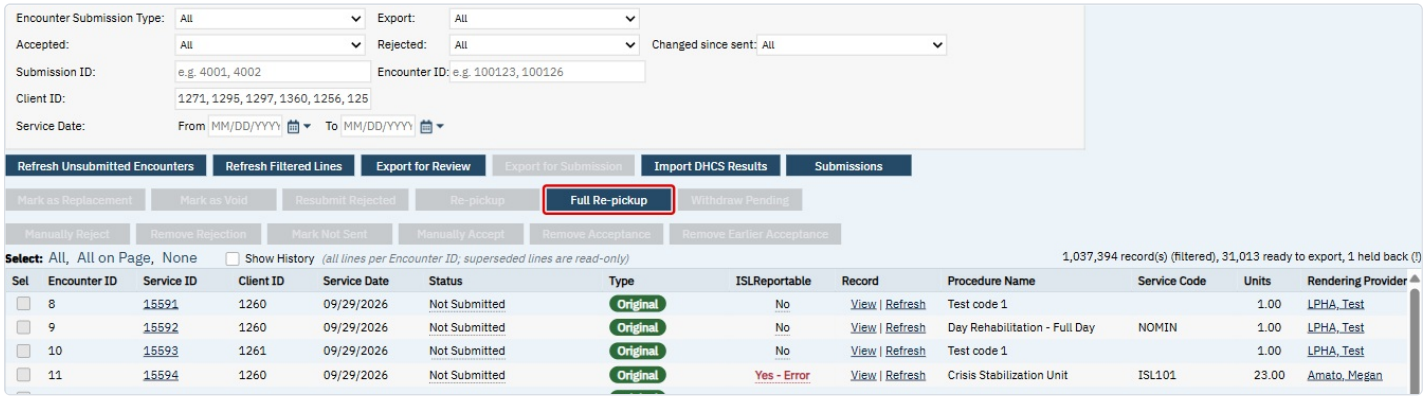
Rules

- Re-pickup applies only to a voided encounter and creates a new Encounter ID; only one live encounter per service charge. CalMHSA decision
- A voided Encounter ID cannot be replaced, so new activity needs a new Encounter ID. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-21

Can it be undone?

No. Withdraw Pending cannot take back a Re-pickup. The new encounter stays on the grid; if you do not export it, it is not sent.

Full Re-pickup



Full Re-pickup. It first counts the lines the last Refresh flagged, then asks you to confirm; nothing is staged until you do.

What it does

Stages, in one go, the changes that change detection suggested for sent lines. It stages **Replacements** (same Encounter ID) for accepted lines whose data changed. It stages **Re-pickups** (new Encounter ID) for voided services that are reportable again only if you tick that box. Replacements that need a person's confirmation (for example a change only in a race/ethnicity mapping or a county-wide setting, or an acceptance recorded by hand) are staged only if you tick their box and confirm a second dialog. It covers every flagged line on every page, whatever the filters, and rechecks each line first.

How to use it

1. Click **Full Re-pickup**. The status line reads *"Counting the rows the last Refresh flagged..."*
2. The dialog shows how many lines it would stage, and which lines are **left for you to decide**: Void suggested, inpatient lines to review by hand, and lines still waiting for DHCS's answer. Find those with the **Changed since sent** filter.
3. Tick the extra boxes you want and confirm.
4. The status line starts *"Full Re-pickup: N line(s) staged (… Replacement(s), … Re-pickup(s))."* and ends *"Nothing has been sent to DHCS: Export for Submission sends the staged lines. Withdraw Pending takes back a staged Replacement; a Re-pickup is a new encounter, which Withdraw cannot take back - leave it unselected and it is not sent."*

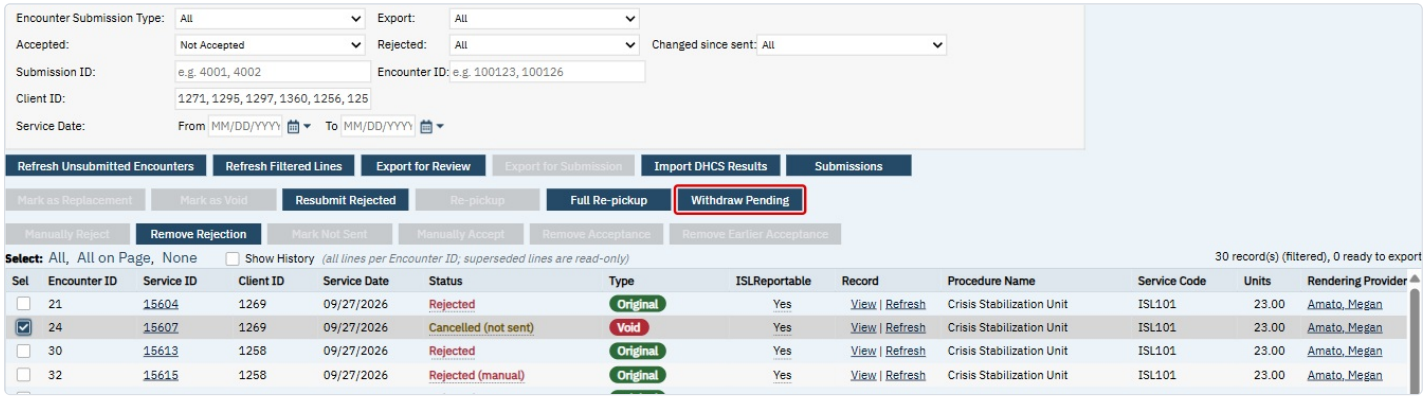
When it is refused

- Nothing is flagged: *"Nothing to Stage"*.
- The flagged lines changed while the dialog was open: *"The flagged rows have changed since you opened Full Re-pickup … Nothing was staged. Open Full Re-pickup again to see the current numbers."*

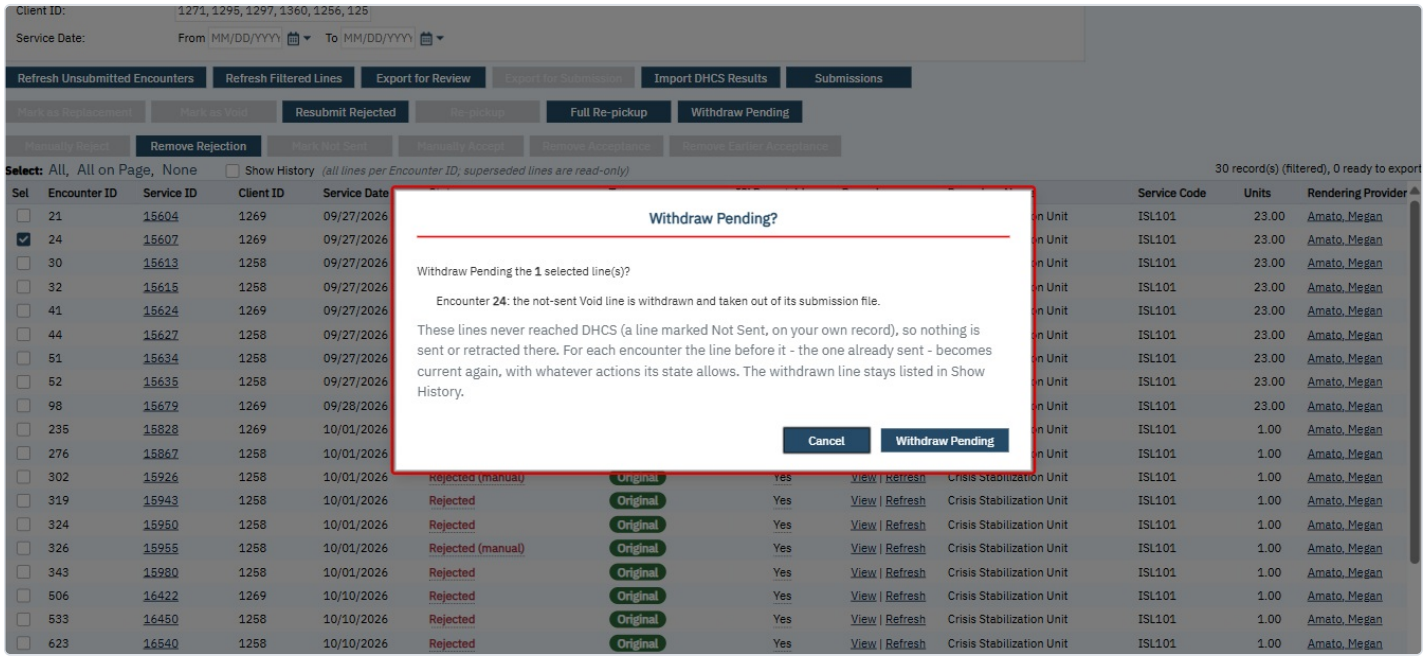
Can it be undone?

A staged Replacement: yes, with Withdraw Pending. A staged Re-pickup: no, but it is not sent unless you export it.

Withdraw Pending



Withdraw Pending, clickable because a line that has not been sent is ticked.



The Withdraw Pending dialog.

What it does

Takes back a staged line that never reached DHCS: a pending Replacement, Void or resubmission, or a line marked *Cancelled (not sent)* by Mark Not Sent. For each encounter, the line before it (the one already sent) becomes current again, with whatever actions its state allows. The withdrawn line stays listed under Show History with Status *Withdrawn*. Nothing is sent to or taken back from DHCS.

When it is allowed

The encounter has an earlier sent line, and the line is either not yet sent, or marked Not Sent in a file DHCS has not answered. Errors do not block it. An encounter's first line cannot be withdrawn.

How to use it

Tick the line(s), click **Withdraw Pending**, read the list of what will be withdrawn, and confirm. Status line: *"N line(s) withdrawn. The line before each is current again."*

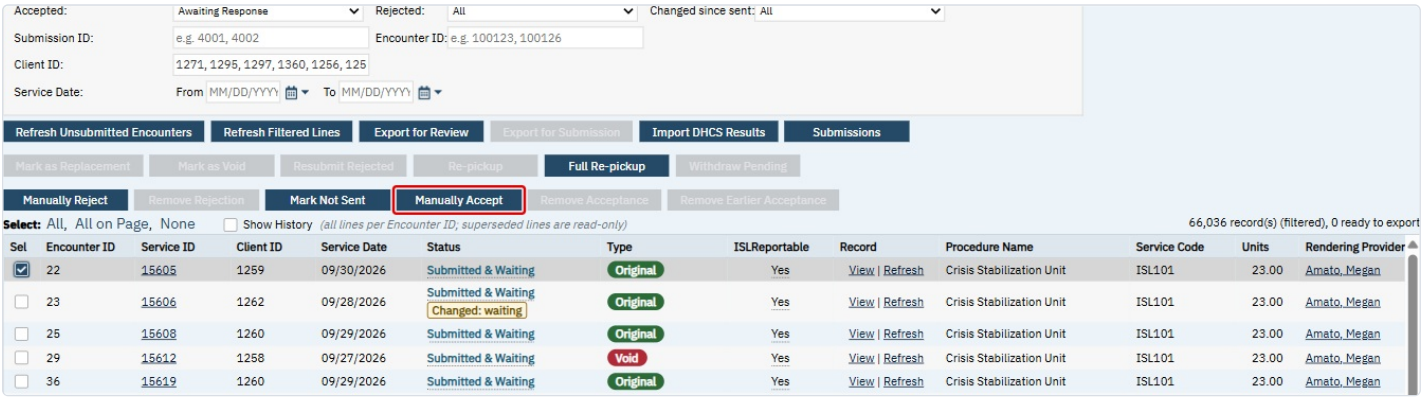
When it is refused

Unlike the other actions, Withdraw Pending works line by line: it withdraws the lines it can and lists the others in a *"Partly Done"* box, each with its reason. For example, a line that may have reached DHCS cannot be withdrawn: *"… If that file was never uploaded, use Mark Not Sent first."* At most 5,000 lines at a time.

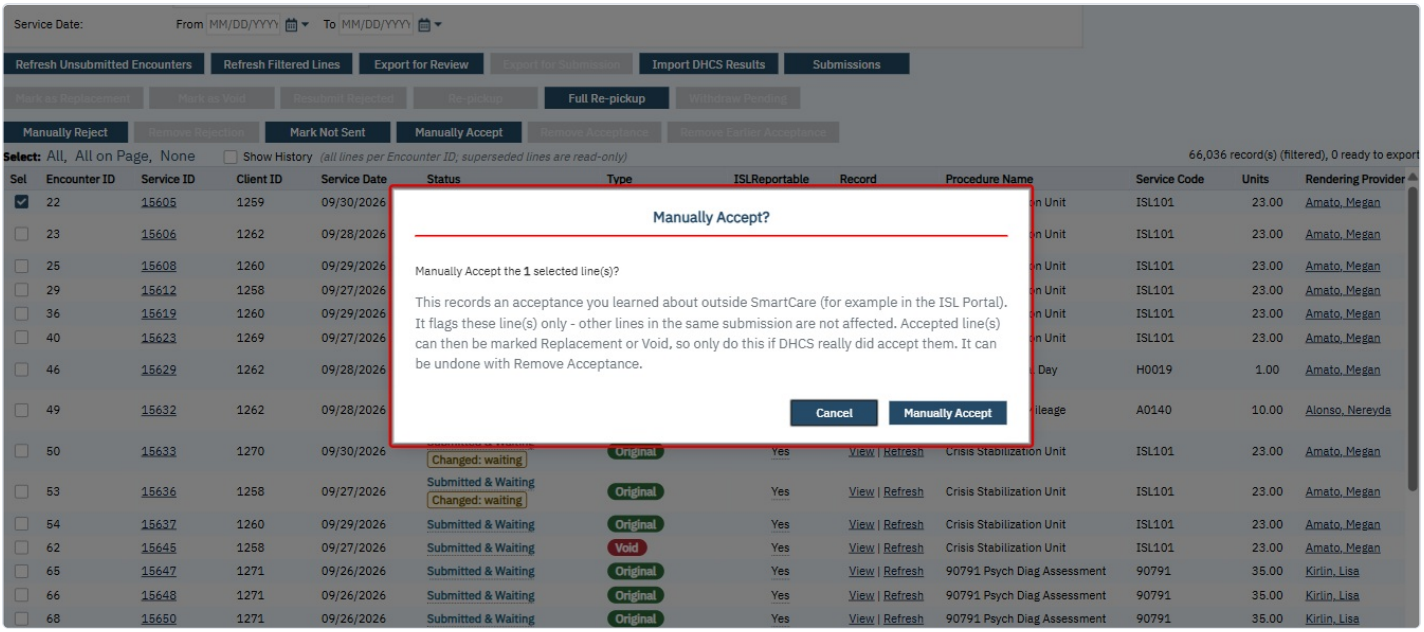
Can it be undone?

No, but you can stage the line again with the action that created it.

Manually Accept



Manually Accept, clickable because a Submitted & Waiting line is ticked.



The Manually Accept dialog.

What it does

Records that DHCS accepted a line, when you learned this outside SmartCare (for example in the DHCS ISL Portal). It changes only the ticked lines, not the rest of the submission. No reason is needed. The Status then reads *Accepted (manual)*.

When it is allowed

The line is *Submitted & Waiting* (sent, no answer yet). Errors do not block it.

How to use it

Tick the line(s), click **Manually Accept** and confirm. Only do this if DHCS really did accept them: an accepted line can then be marked as Replacement or Void. The status line says the acceptance was recorded by hand, not by DHCS, and ends *"… those line(s) can now be marked Replacement or Void, or use Remove Acceptance to undo it."*

When it is refused

- *“Only submitted lines can be accepted. This line has not been exported for submission yet.”*
- *“This line is already marked accepted.”*
- *“This line is flagged rejected. Remove the rejection first if it was recorded by mistake.”*
- *“A result is already recorded for this line - it cannot be overwritten by hand.”*

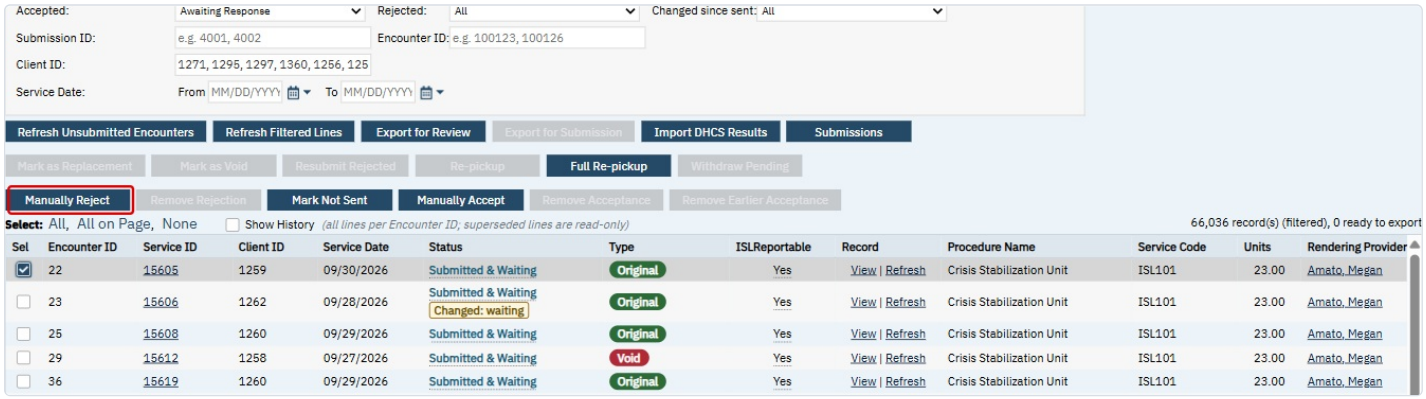
Rules

- A user may record a DHCS acceptance by hand on a line that has no answer yet. CalMHSA decision

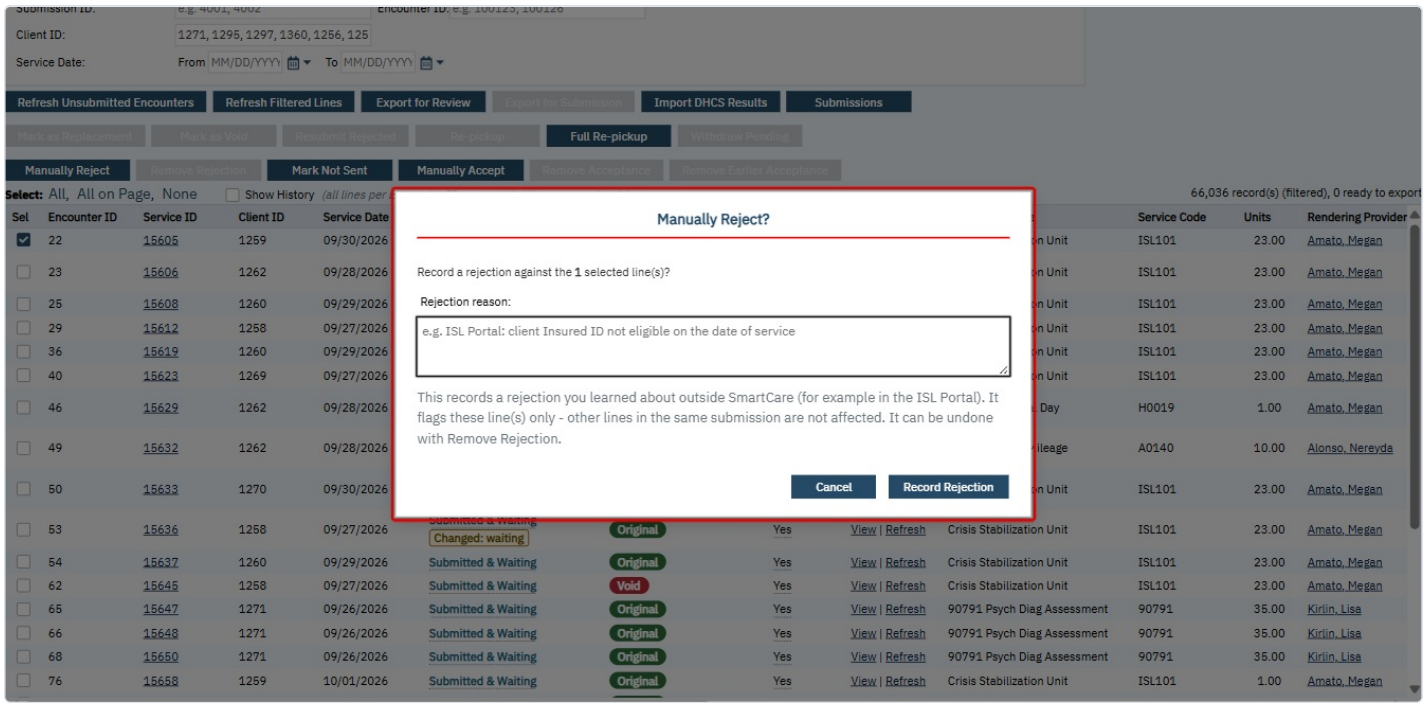
Can it be undone?

Yes, with **Remove Acceptance**, as long as no DHCS result has since been imported for the line.

Manually Reject



Manually Reject, clickable because a Submitted & Waiting line is ticked.



The Manually Reject dialog, with the box for the rejection reason.

What it does

Records that DHCS rejected a line, when you learned this outside SmartCare (for example in the DHCS ISL Portal). You type **one reason**, and it is saved on every ticked line. The Status then reads *Rejected (manual)*. Other lines in the same submission are not affected.

When it is allowed

The line is *Submitted & Waiting*. Errors do not block it.

How to use it

1. Tick the line(s) and click **Manually Reject**.
2. Type the rejection reason (up to 1000 characters). With several lines ticked, the label says the reason is applied to all of them.
3. Click **Record Rejection**. Status line: *"N line(s) flagged as rejected. This was recorded manually, not by DHCS - Resubmit Rejected to correct and resend, or Remove Rejection to undo it."*

When it is refused

- No reason typed: *"Enter a rejection reason. It will be recorded against all N selected line(s)."* The dialog stays open.
- Too long: *"The reason is limited to 1000 characters (you entered N)."*
- *"Only submitted lines can be rejected. This line has not been exported for submission yet."*
- *"This line is already flagged rejected."*
- *"This line is already marked accepted. Remove the acceptance first if it was recorded by mistake."*

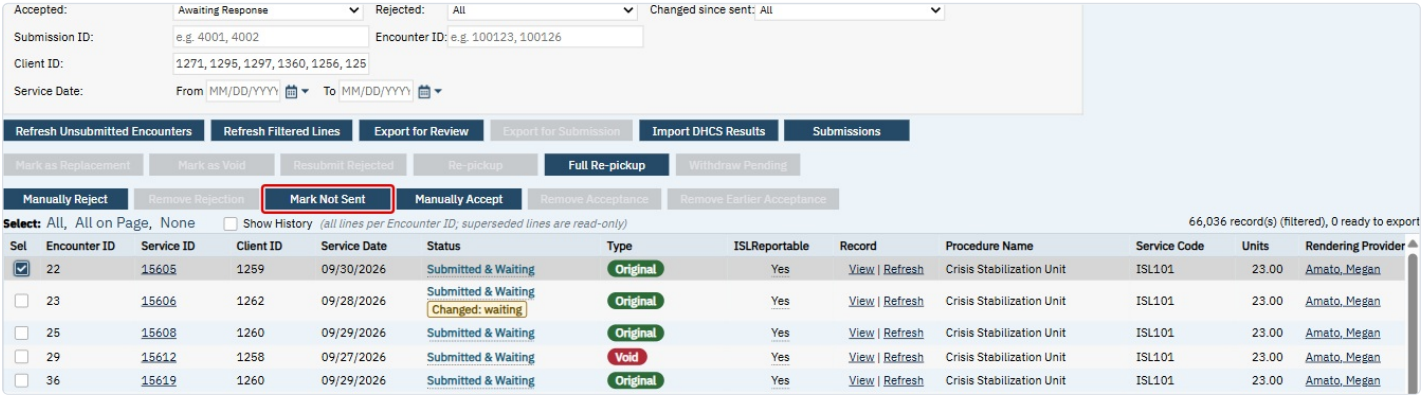
Rules

- A rejection can be recorded by hand on a line with no answer yet, and it affects only that line. CalMHSA decision
- A manual rejection needs a reason of at most 1000 characters. CalMHSA decision

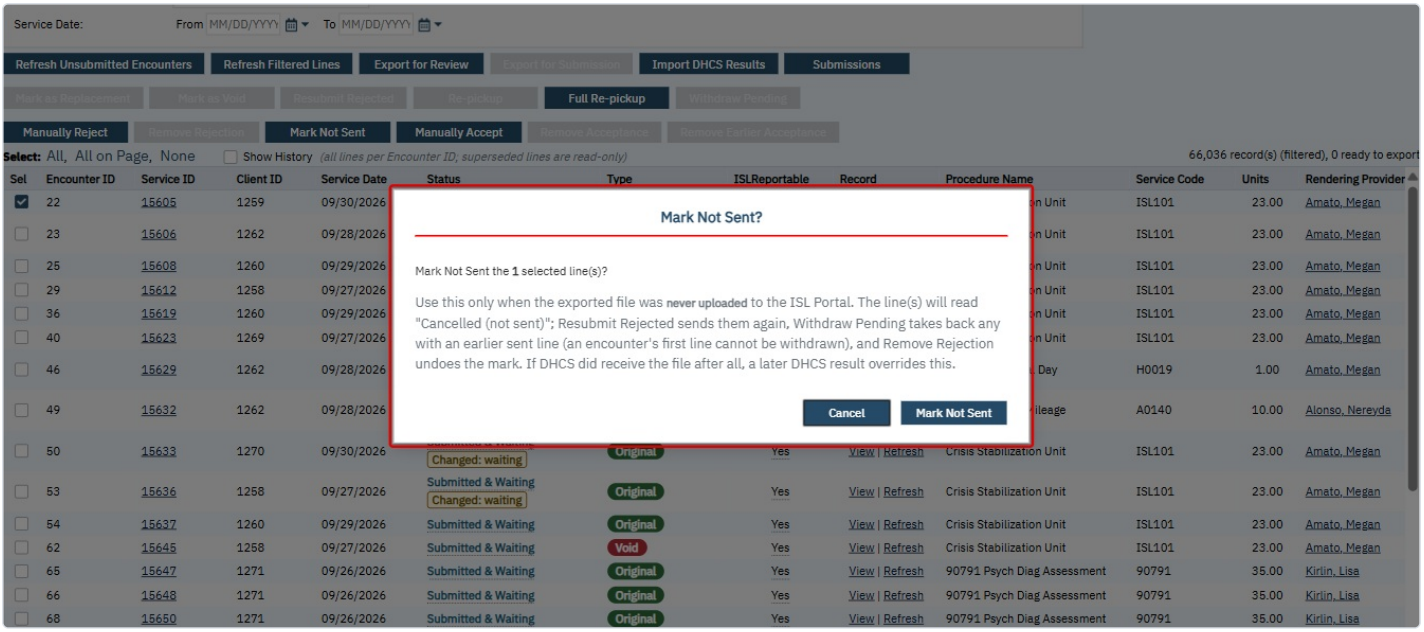
Can it be undone?

Yes, with **Remove Rejection**, as long as you have not resubmitted the line and no DHCS result has been imported for it.

Mark Not Sent



Mark Not Sent, clickable because a Submitted & Waiting line is ticked.



The Mark Not Sent dialog.

What it does

For a file you exported but **never uploaded** to the ISL Portal. The ticked lines read *Cancelled (not sent)*, with the reason *"Not sent to DHCS - the exported file was never uploaded (Mark Not Sent)."* You can then resend them with Resubmit Rejected, take back any that have an earlier sent line with Withdraw Pending, or undo the mark with Remove Rejection. If DHCS did receive the file after all, a later DHCS result overrides the mark.

When it is allowed

The line is *Submitted & Waiting*, and no line of its file has a DHCS result.

How to use it

Tick the line(s), click **Mark Not Sent**, read the warning and confirm. Status line: *"N line(s) marked as not sent to DHCS. They read "Cancelled (not sent)" - …"*

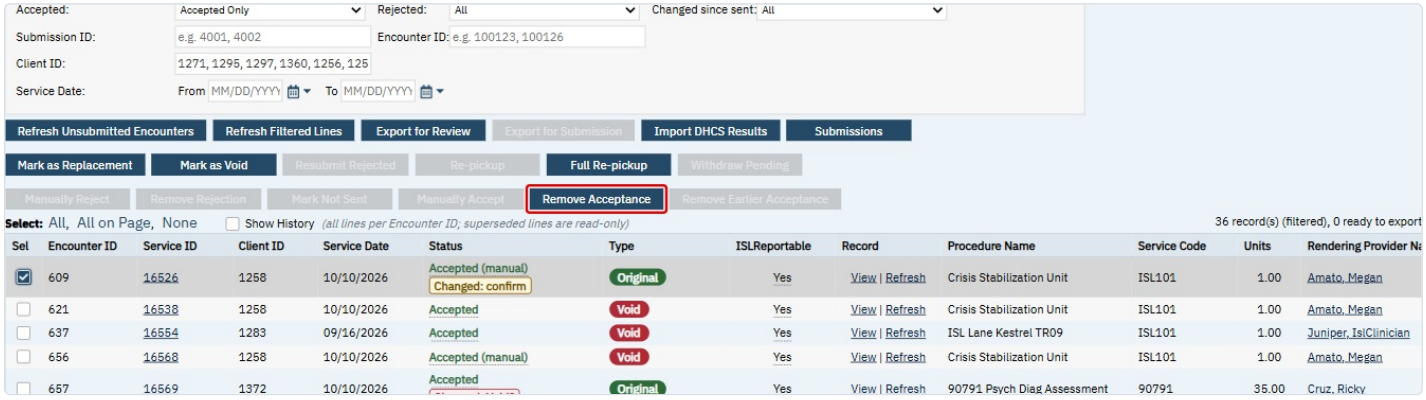
When it is refused

- *"A DHCS response has been applied to this submission, or another line of the same file already has a result, so the file did reach DHCS. Use Manually Reject or Manually Accept instead."*
- *"Only an exported line can be marked not sent. This line has not been exported yet - nothing to cancel."*
- *"A result is already recorded for this line, so it did reach DHCS (or was settled by hand). Remove that result first if it was recorded by mistake."*

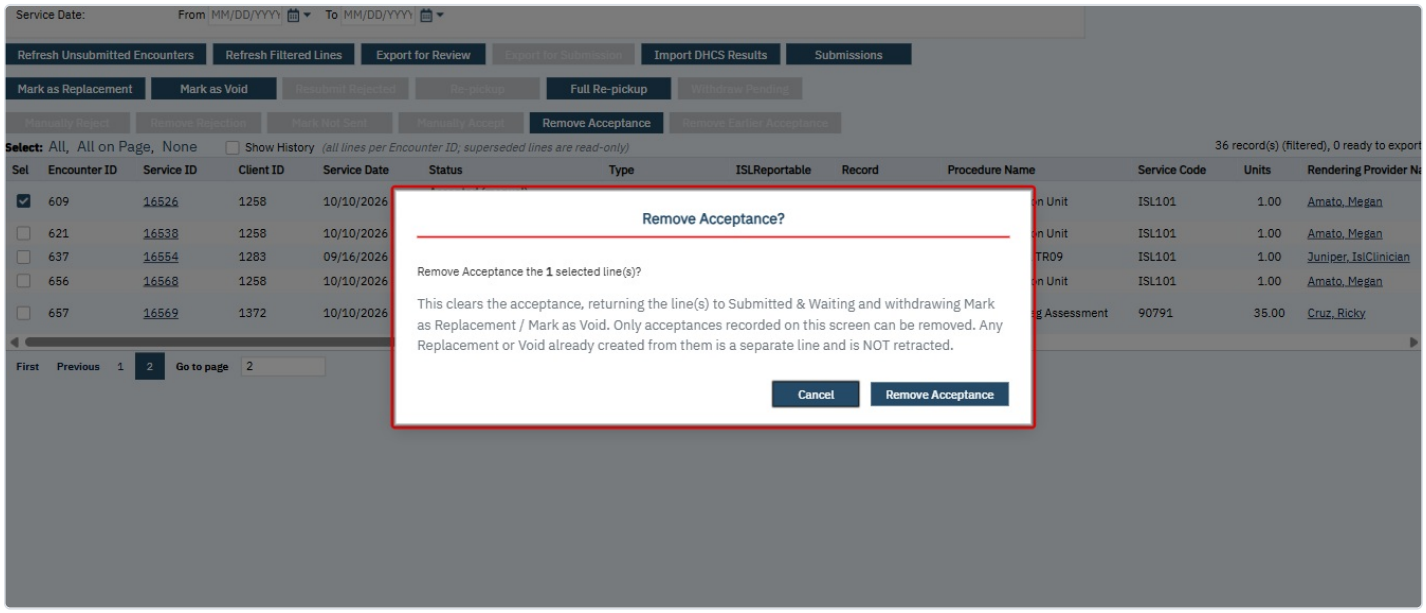
Can it be undone?

Yes, with **Remove Rejection**.

Remove Acceptance



Remove Acceptance, clickable because a manually accepted line is ticked.



The Remove Acceptance dialog.

What it does

Undoes a **Manually Accept**. The line goes back to *Submitted & Waiting*, and Mark as Replacement / Mark as Void are no longer offered for it.

When it is allowed

The acceptance was recorded on this screen (not from DHCS), it is still the line's current state, and a voided line has not been re-picked up since.

When it is refused

- *"This line is not marked accepted, so there is nothing to remove."*
- *"This acceptance came from DHCS, not from this screen. Only a manually-entered acceptance can be removed."*
- *"This Void has already been re-picked up as a new encounter, which exists because this Void was accepted. The acceptance can no longer be removed from this screen."*

Rules

- Only an acceptance recorded on this screen can be removed; a DHCS acceptance cannot. CalMHSA decision
- Any Replacement or Void you already created from the acceptance is a separate line and is **not** removed; the status line says so. Use Withdraw Pending for it.

Remove Earlier Acceptance

What it does

For a rejected Replacement or Void whose **earlier** line was accepted by hand on this screen, by mistake. It removes that earlier manual acceptance, so that Resubmit Rejected then resends the encounter as an Original. The dialog warns: *"You are stating that DHCS did not accept the earlier line - that the acceptance recorded on this screen was a mistake."* If DHCS did accept it, an Original would report the service twice.

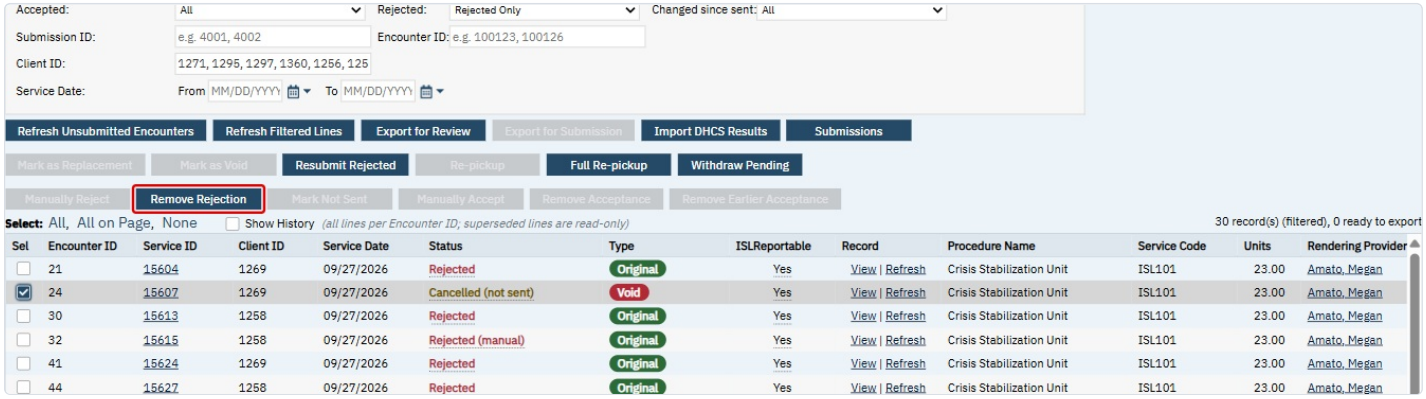
When it is allowed

The line is a rejected Replacement or Void, the earlier acceptance was recorded by hand, every line sent since was rejected, and the encounter has not been re-picked up.

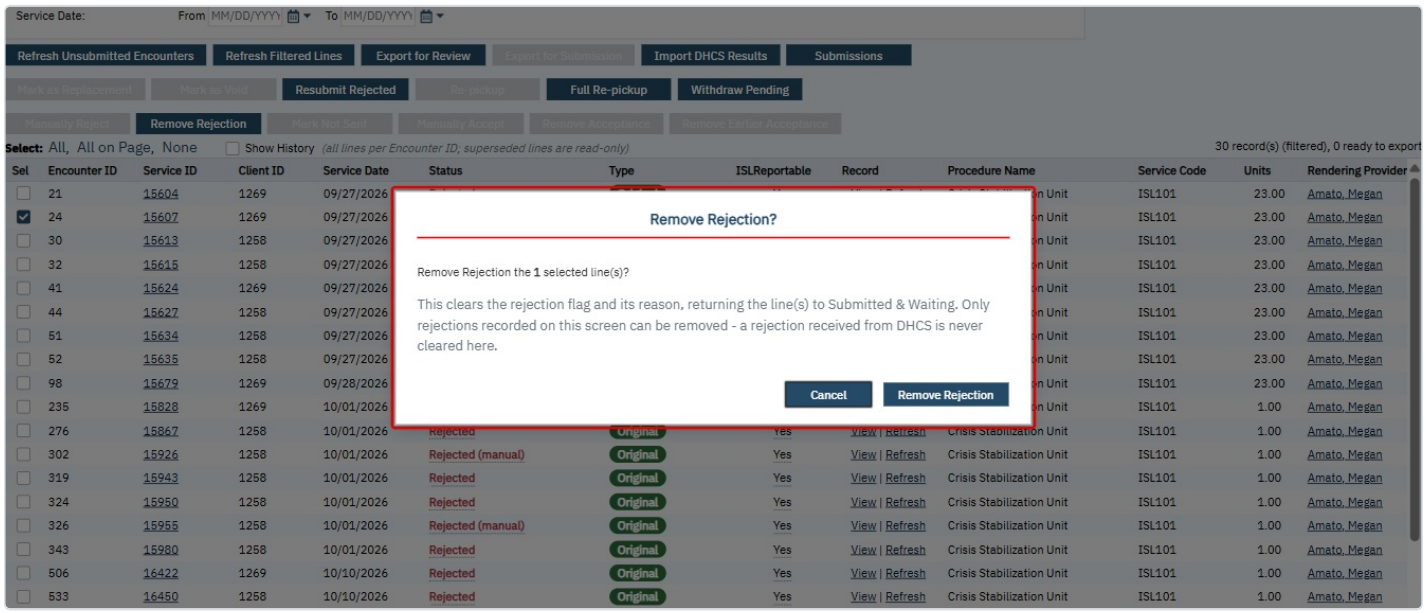
When it is refused

- *"Applies only to a rejected Replacement or Void that still has an earlier accepted line under it."*
- *"Not available: the earlier acceptance came from DHCS, a later line was not rejected, or the encounter was re-picked up. Only an acceptance recorded on this screen, with every later line rejected, can be removed this way."*

Remove Rejection



Remove Rejection, clickable because a manually rejected line is ticked.



The Remove Rejection dialog.

What it does

Undoes a **Manually Reject** or a **Mark Not Sent**. It clears the rejection and its reason, and the line goes back to *Submitted & Waiting*. Status line: *"N manual rejection(s) removed. Those line(s) are back to Submitted & Waiting."*

When it is allowed

The rejection was recorded on this screen and is still the line's current state (not yet resubmitted).

When it is refused

- *"This line is not flagged rejected, so there is nothing to remove."*
- *"This rejection came from DHCS, not from this screen. Only a manually-entered rejection can be removed."*

Rules

- Only a rejection recorded on this screen can be removed; a DHCS rejection never can. CalMHSA decision

Line states

What it shows

You can tell a line's state from the **Status** column (hover it for the detail) and the **Type** column (Original, Replacement or Void).

Status	Meaning
Not Submitted	Picked up by Refresh, never exported. Can be exported if ISL Reportable is *Yes*.
Pending (not sent)	A Replacement, Void or resubmission staged and not yet exported. Export for Submission sends it; Withdraw Pending takes it back.
Submitted & Waiting	Sent; no DHCS answer recorded yet.
Accepted / Accepted (manual) / Accepted with warnings	DHCS accepted it (recorded by import, or by hand). An accepted line with Type Void is **voided**: final.
Rejected / Rejected (manual)	DHCS rejected it. Needs correcting and resubmitting.
Cancelled (not sent)	Marked Not Sent: the file was never uploaded.
Answered	A DHCS answer is recorded; hover for the detail. Open item
Withdrawn	Taken back with Withdraw Pending. Seen only with Show History. Read-only.
(greyed, in italics)	An earlier, superseded line of the encounter. Seen only with Show History. Read-only.

Two marks can appear on top of the Status: **Yes - Error** in the ISLReportable column (the data has a problem DHCS would reject), and a **Changed** badge (the data changed since the line was sent). A red **!** by the tick box means the line is held back from export.

Which action works in which state

State	Export for Submission	Mark as Replacement	Mark as Void	Resubmit Rejected	Re-pickup	Withdraw Pending	Manually Accept / Reject, Mark Not Sent	Remove Acceptance	Remove Rejection
Not Submitted, Reportable Yes, no errors	Yes	–	–	–	–	–	–	–	–
Not Submitted, Reportable No	–	–	–	–	–	–	–	–	–
Pending (not sent)	Yes, unless held back	–	–	–	–	Yes	–	–	–
Submitted & Waiting	–	–	–	–	–	–	Yes (Mark Not Sent only if the file has no result)	–	–
Accepted Original / Replacement	–	Yes, if still reportable and no errors	Yes	–	–	–	–	If accepted by hand	–
Rejected	–	–	Only if an earlier line was accepted	Yes, if no errors (a rejected Void even with errors)	If DHCS accepted an earlier Void	–	–	–	If rejected by hand
Cancelled (not sent)	–	–	–	Yes	–	If the encounter has an earlier sent line	–	–	Yes
Voided (accepted Void)	–	–	–	–	Yes (newest encounter only)	–	–	If accepted by hand and not re-picked up	–

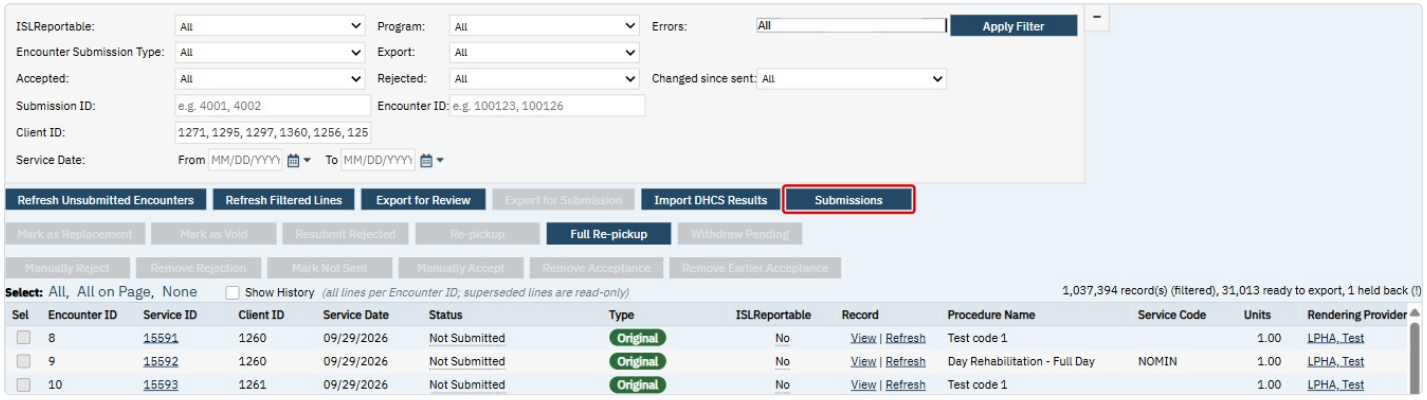
Superseded or Withdrawn (history)	–	–	–	–	–	–	–	–	–

Remove Earlier Acceptance applies to a rejected Replacement or Void whose earlier acceptance was recorded by hand.

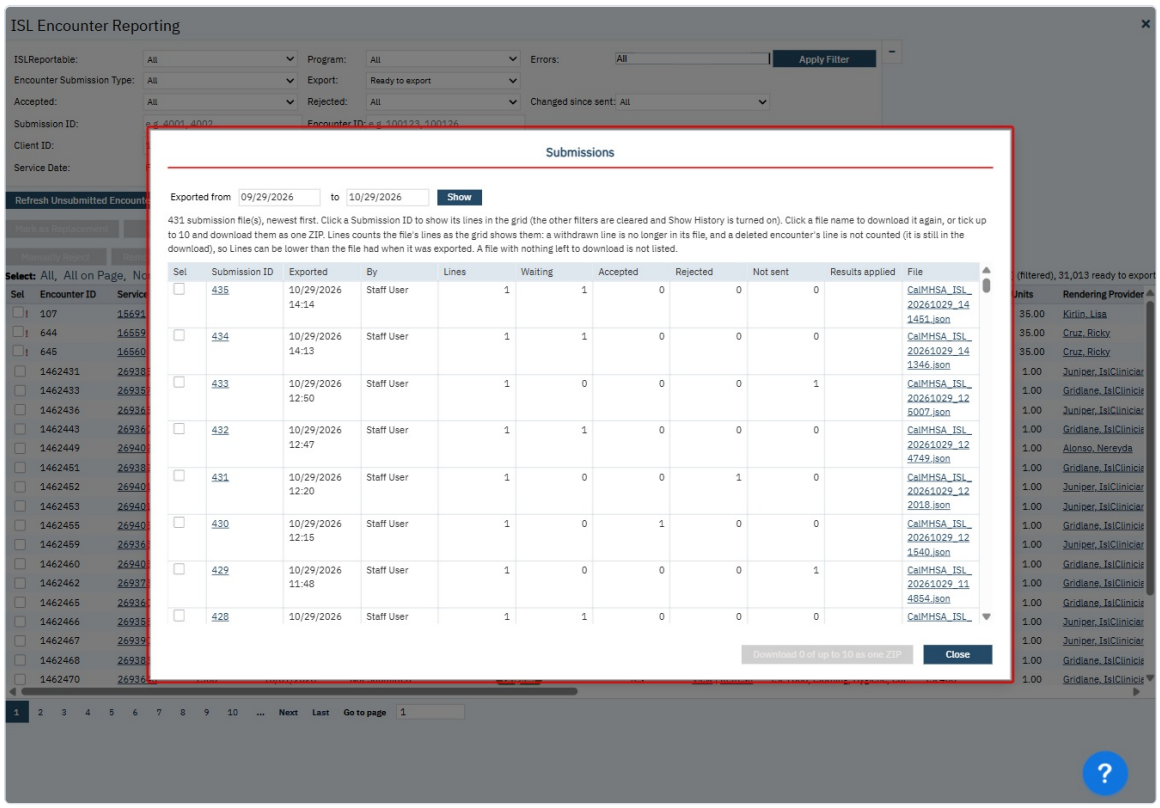
Rules

- Rejection is shown as a state of the line, not as a type of its own: a line can be an Original and rejected. CalMHSA decision
- An encounter has at most one current line; marking a Replacement or Void moves the earlier line into history. CalMHSA decision
- Replacement and Void apply only to accepted encounters; a never-accepted rejected encounter cannot be voided. DHCS ISL Encounter Reporting Guidance v1.0, pp.20-22

Submissions



Submissions. It opens the list of exported files and changes nothing.



The Submissions dialog: the files exported in the last 30 days, newest first, with their line counts. The By column is shown as Staff User here.

What it shows

The **Submissions** button opens a list of the submission files exported in a date range. For each file it shows how many of its lines are waiting, accepted, rejected or not sent. Anyone who can open the screen can use it, and nothing ticked is needed.

Column	What it means
Sel	Tick box to choose files for a ZIP download (export permission only).
Submission ID	Click it to show that file's lines in the grid. The other filters are cleared and Show History is turned on.
Exported, By	When the file was made (date and time) and by whom.
Lines	The file's lines as the grid shows them. A withdrawn line is no longer in its file, and a deleted encounter's line is not counted (it is still in the download), so Lines can be lower than the file had when it was exported.
Waiting, Accepted, Rejected, Not sent	The lines in each state. Accepted counts accepted, accepted with warnings and accepted by hand; Rejected counts DHCS and manual rejections. Hover a number to see its parts.
Results applied	When DHCS results were first imported for this file.
File	The file name. With the export permission, click it to download the file again, with the same content as the first download.

How to use it

1. Click **Submissions**. It opens with the last 30 days and lists the files, newest first.
2. Change **Exported from** and **to** (MM/DD/YYYY) and click **Show** (or press Enter).
3. To download several files at once, tick up to 10 and click **Download selected as one ZIP**.
4. Click **Close** (or press Esc) when done.

When it is refused

- *“Enter both Exported dates as MM/DD/YYYY.”*
- *“The first Exported date cannot be after the second.”*
- No files in the dates: *“No submission files were exported in those dates.”*

Rules

- A file with nothing left to download is not listed.
- One ZIP holds at most 10 files.

ISL reports

What they are

Four reports in SmartCare's **Reports** list give an overview without the grid. They are available to the **County Affiliate SysAdmin** role. The screen has no link to them; open them from the Reports list. Every report's dates default to the last 3 months, and both dates are included.

> Billing staff who use the screen may not have access to these reports unless their role is given it.

Report	What it lists	Choices
ISL Submission Batches	One row per submission file exported in the dates, with its lines counted by type (Originals, Replacements, Voids) and by status, and when it was first answered. Unlike the Submissions list, it also lists files with no lines left.	Exported From, Exported Through
ISL Submitted Lines	Every line sent in files exported in the dates, with the values as sent, its current status and reason, and whether it is still the current line (*Yes* or *No - superseded*). Withdrawn lines are not listed.	Exported From, Exported Through, Include Voids (default No), Status, Client ID (blank = all)
ISL Encounter Status	One row per encounter for services in the dates: current status, type, last submission, what DHCS holds by our records (*Nothing accepted*, *Voided*, *Accepted Replacement*, *Accepted Original*, with *(manual)* when recorded by hand), changes since sent, and errors. For a line withdrawn out of its file, Last Submission ID shows the file it was withdrawn from.	Service Date From, Service Date Through, Status, Changed Encounters Only (default No)

ISL Held Back - Errors	Reportable encounters that validation errors keep from DHCS: the data to fix in SmartCare. These are not the grid's *"held back (!)"* rows, which have no stored errors but would be refused for another reason.	Service Date From, Service Date Through, Program ID (blank = all)

When a report runs to more than one page, its column headings are repeated at the top of each page.

When a report is refused

A refused report shows one sentence in dark red instead of the table. The sentences name the boxes as they are labelled.

- All four: *"Exported From and Exported Through are required."* / *"Exported From cannot be after Exported Through."* (or the same with Service Date).
- ISL Submitted Lines and ISL Encounter Status: *"Choose a date range of 12 months or less."*
- ISL Submitted Lines: *"More than 50,000 lines match. Narrow the export dates, leave out Voids, or choose a status or a client."*
- ISL Encounter Status: *"More than 50,000 encounters match. Narrow the service dates, or choose a status or Changed only."*
- ISL Held Back - Errors: *"More than 50,000 encounters match. Narrow the service dates or choose a program."*

When nothing matches

The report shows its title and column headings with no rows and no message.

Reportability rules in plain words

Which lines count

SmartCare checks four rules in order. The first rule that fits decides the line. Then a list of exclusions can still turn a *Yes* into a *No*.

Rule	The line is reportable when…	Billing code sent
A	The procedure is on the **ZZ-ISL Plan Template** coverage plan with a billing code starting with `ISL`. This applies whatever the client's coverage.	The template's code
B	The procedure is on the template with a non-ISL code, and the service has **no Medi-Cal charge**.	The template's code
C	The procedure is not on the template, but its display name starts with `ISL`.	From the procedure's normal rates
D	This line's charge is on the **client account** (self-pay), or is a Medi-Cal charge **denied** for an allowed reason.	From the procedure's normal rates
–	None of the above, including a charge denied for any other reason.	Not reportable (*No*)

Exclusions (turn Yes into No)

1. The service is no longer Complete in SmartCare: *"the service is not Complete in SmartCare (its status is no longer Complete)"*.
2. The service is dated before the ISL reporting start (the start date itself counts). See Configuration settings.
3. The service has the billing code `NOMIN` (did not meet the Medi-Cal minimum time).
4. The service has no dollar amount ($0).
5. **UMDAP:** a self-pay line (rule D) for a client who has Medi-Cal on the date of service, unless a charge on the same service was denied for an allowed reason. Medi-Cal added later with a start date back over the service turns the self-pay line *No* on the next Refresh.
6. **Share of cost:** the client has a share-of-cost record for that month (rule B, rule D self-pay, and a CO-177 denial only).
7. The service or client has been deleted in SmartCare.

Rules

- Only services not reimbursable through Medi-Cal are reported. DHCS ISL Encounter Reporting Guidance v1.0, p.3
- Services with no code in the ISL Code Library are out of scope. Which procedures count is set by the ZZ-ISL Plan Template and procedure names. DHCS ISL Encounter Reporting Guidance v1.0, pp.4-5
- Rule A. CalMHSA decision
- Rule B. CalMHSA decision
- Rule C (use the procedure's display name). CalMHSA decision
- Rule D, self-pay lines. CalMHSA decision
- Allowed denial reasons, on a Medi-Cal charge only: **CO-177** (only with no share of cost that month), **CO-96 with MA43**, **CO-6 with N129**, **CO-96 with N242**. The remark code must be on the same claim line as the denial. CalMHSA decision

- The template rate is used even if it is not in effect on the date of service; the hover text then says so.
- For rules C and D the billing code comes from the procedure rate SmartCare would use for a claim (procedure, program, location, clinician's billing degree, date of service and number of units). CalMHSA decision Plan rates are preferred to standard rates, Medi-Cal plans first. CalMHSA decision **Open item**
- Reporting start: set by the `CalMHSAISLReportingStartDate` setting, never earlier than 07/01/2026. Production is expected to use 01/01/2027. DHCS ISL FAQ (copy of 2026-09-17), p.3; CalMHSA decision **Open item**
- Services under the Medi-Cal minimum time are not reportable. DHCS ISL FAQ (copy of 2026-09-17), p.5; CalMHSA decision
- A $0 service is not reportable. CalMHSA decision
- SOC and UMDAP services are not reportable when the client has Medi-Cal and the service is Medi-Cal coverable. DHCS ISL FAQ (copy of 2026-09-17), p.5; CalMHSA decision Whether UMDAP also applies to rule B lines is open. **Open item**
- A service billed only to a commercial plan is not reportable unless it is on the template or named ISL. CalMHSA decision

Not yet built

Several reporting rules are not yet built because DHCS guidance is pending (for example same-day services, lockouts and housing codes). See Open items.

Required-field errors ("Yes - Error")

What it shows

A reportable line that DHCS would reject reads *Yes - Error*. It is not exported as a new line, Replacement or resubmission, and Mark as Replacement and Resubmit Rejected are refused for it. Fix the data in SmartCare (client record, coverage, staff licenses, service), then recheck the line with its **Refresh** link or **Refresh Filtered Lines**. Use the ISLReportable filter **Reportable - with errors**, or the **Errors** filter, to list them; the **ISL Held Back - Errors** report lists them too. CalMHSA decision

Some checks depend on the line's **service category**, which SmartCare works out from the billing code because DHCS has not yet categorised the codes. DHCS ISL Code Library (2026-06-17), "Open Questions" sheet; CalMHSA decision

- **Inpatient**: billing codes ISL100 to ISL109.
- **Day / 24-hour**: services entered in Days.
- **Time-based ISL**: other ISL codes entered in Minutes or Hours.
- **Expense**: any other ISL code.
- **Outpatient**: everything else.

Rules

#	What is checked	Message in the hover text	Source
1	A billing code was found	*"BillingCode is required and no matching billing code could be found"*	DHCS ISL Encounter Fields workbook v1.0, "Full ISL Encounter Fields" row 31
2	County code present and between 01 and 58	*"Sender County Code is required"* / *"Sender County Code must be a DHCS county code 01-58 (… is n)"*	DHCS ISL Encounter Fields workbook v1.0, row 6 **Open item**
3	At least one client ID: CIN, MRN or a real SSN (999999999 and 000000000 do not count)	*"At least one client identifier is required: CIN, MRN, or a real SSN (placeholder SSNs 999999999 and 000000000 do not count)"*	DHCS Encounter Rules and Specifications (2026-04-30), "Identity Rules"; DHCS ISL Encounter Reporting Guidance v1.0, p.7
4	SSN is 9 digits	*"Client SSN must be 9 digits"*	DHCS Encounter Rules and Specifications (2026-04-30), "Identity Rules"
5	CIN is "9", seven digits, then a letter	*"Insured ID (Medi-Cal CIN) must be 9 characters: "9", seven digits, then a letter (e.g. 90000000A)"*	DHCS Encounter Rules and Specifications (2026-04-30), "Identity Rules"
6–7	Client first and last name	*"Client First Name is required"* / *"Client Last Name is required"*	DHCS ISL Encounter Fields workbook v1.0, rows 10-11
8	Race/ethnicity present, and every value has a USCDI description	*"Client Race/Ethnicity is required"* / *"Client Race/Ethnicity has no USCDI description (…) for: [value]"*	DHCS ISL Encounter Fields workbook v1.0, row 15; DHCS ISL Encounter Reporting Guidance v1.0, p.8; CalMHSA decision
9–11	Client street address, city, state	*"Client Address is required"* / *"Client City is required"* / *"Client State is required"*	DHCS ISL Encounter Fields workbook v1.0, rows 16, 18-19
12	ZIP present, 5 or 9 digits	*"Client Zip Code is required"* / *"Client Zip Code must be 5 digits or 9 digits (ZIP+4)"*	DHCS ISL Technical Documentation v1.1, #17 p.10

13	Primary diagnosis (not on Expense lines)	*"Diagnosis Code is required"*	DHCS ISL Encounter Fields workbook v1.0, row 34
14	Place of service on the location (not on Expense lines)	*"Place of Service Code is required - the service location has no place of service"*	DHCS Encounter Rules and Specifications (2026-04-30), "Place of Service"
15	Outpatient and time-based lines: clinician has a 10-digit NPI in effect on the date of service	*"Rendering Provider NPI is required - the rendering staff has no NPI effective on the date of service"* / *"Rendering Provider NPI must be 10 digits"*	DHCS Encounter Rules and Specifications (2026-04-30), "Rendering Provider Rules"; DHCS ISL Technical Documentation v1.1, §23
16	Same lines: the NPI has a taxonomy of at most 10 characters	*"Rendering Provider Taxonomy Code is required - the rendering staff's NPI row has no taxonomy"* / *"… is longer than 10 characters"*	DHCS Encounter Rules and Specifications (2026-04-30), "Rendering Provider Rules"; DHCS ISL Encounter Fields workbook v1.0, row 27
17	Agency billing NPI (required except on Expense lines; 10 digits on every line)	*"Billing Provider NPI is required - …"* / *"Billing Provider NPI must be 10 digits …"*	DHCS Encounter Rules and Specifications (2026-04-30), "Billing Provider Rules"; DHCS ISL Technical Documentation v1.1, §26
18	Agency billing taxonomy (required except on Expense lines; at most 10 characters)	*"Billing Provider Taxonomy Code is required - …"* / *"… is longer than 10 characters …"*	DHCS Encounter Rules and Specifications (2026-04-30), "Billing Provider Rules"; DHCS ISL Encounter Fields workbook v1.0, row 30
19	Inpatient lines: a program enrollment covers the service (admission date)	*"Admission Date is required on inpatient lines - no program enrollment covers this service"*	DHCS Encounter Rules and Specifications (2026-04-30), "Admission / Discharge Dates"

Not checked today

Some DHCS requirements are not yet validated by SmartCare, so a line can show *Yes* and still be rejected by DHCS. See Open items, "Not yet validated by SmartCare."

The file that goes to DHCS, and the response

Sending

1. **Export for Submission** downloads a file named `[County name]_ISL_[YYYYMMDD]_[HHMMSS].json`, for example `CalMHSA_ISL_20261027_140912.json`. It holds one record per exported line.
2. Upload it yourself to the **DHCS ISL Portal**. SmartCare does not send anything to DHCS on its own.
3. The portal gives immediate feedback: each encounter is Accepted, Accepted with Warning, or Rejected. DHCS ISL Implementation Guide v1.0, p.3

Recording the answer

- Download the **Encounters List** from the ISL Portal and use **Import DHCS Results**. See Import DHCS Results.
- Or record each answer with **Manually Accept** or **Manually Reject** (with the rejection reason from the portal).
- If you never uploaded a file, use **Mark Not Sent**.

Rules

- Counties submit through the ISL Portal (upload) or an API. This screen supports portal upload only. DHCS ISL Implementation Guide v1.0, p.3
- Files must end in `.json`; other extensions are not processed. DHCS does not set a file name pattern; the pattern above is CalMHSA's. DHCS ISL Technical Documentation v1.0, p.2
- Dates are sent as YYYYMMDD. DHCS ISL Encounter Fields workbook v1.0, "Definitions" sheet Missing values are sent as JSON `null`, and stray spaces are trimmed.
- Reporting is at least once a year, within 90 days after the fiscal year ends. The first report (services 01/01/2027 to 06/30/2027) is due by September 2027; DHCS documents give 28 and 30 September. DHCS ISL Encounter Reporting Guidance v1.0, p.3; DHCS ISL FAQ (copy of 2026-09-17), p.3

What each record contains

#	DHCS field	What SmartCare sends
1	Encounter ID	The Encounter ID column.
2	Submission type	Original, Replacement or Void.
3	Service type	Always empty (null); DHCS assigns it. DHCS ISL Encounter Fields workbook v1.0, row 5; CalMHSA decision

3	Service type	Always empty (null); DHCS assigns it. DHCS ISL Encounter Fields workbook v1.0, row 5; CalMHSA decision
4	Sender county code	The county code from County Information, two digits. **Open item**
5	Client CIN	The Insured ID column. **Open item**
6	Client MRN	The SmartCare client ID, with no county prefix.
7	Client SSN	Digits only. A placeholder SSN is sent but does not count as an ID.
8–10	First, last, middle name	From the client record.
11	Date of birth	From the client record.
12	Sex	M, F, or UNK for anything else. CalMHSA decision
13	Race/ethnicity	Every race, then every ethnicity, as USCDI descriptions, comma separated. A race with a live USCDI mapping is sent as that mapping's USCDI description. DHCS ISL Encounter Reporting Guidance v1.0, p.8; CalMHSA decision A mapping row is skipped only once its end date has passed (a row ending today still counts), and when two rows map the same value the earliest one wins.
14	Address	The client's street. A two-line street is sent as one value with a line break. **Open item**
15	Address line 2	Always empty. CalMHSA decision
16–18	City, state, ZIP	From the client's address. A 9-digit ZIP is sent with a hyphen (95815-1234). DHCS ISL Technical Documentation v1.1, #17 p.10 **Open item**
19	Phone	The client's phone, if any.
20	Insurance status	Every status that applies (Medicaid, Medicare, Private Insurance, Uninsured), or UNKNOWN. DHCS ISL Encounter Reporting Guidance v1.0, p.8; CalMHSA decision
21	Program name	The Program Name column.
22	Rendering provider type	1 for outpatient and time-based ISL; 2 for inpatient and day/24-hour; empty for Expense. CalMHSA decision
23	Rendering provider name	The clinician; empty for Expense.
24–25	Rendering NPI and taxonomy	Outpatient and time-based lines only.
26–28	Billing provider name, NPI, taxonomy	From the agency record, on every line.
29	Service code	The Service Code column.
30	Modifiers	The Modifiers column, comma separated.
31	Quantity	The Units column: the template's claim units for an ISL code, otherwise the service's units. A fraction is kept.
32	Diagnosis	The primary diagnosis; `UNKNOWN` on an Expense line with none. DHCS ISL Encounter Reporting Guidance v1.0, p.9 **Open item**
33	Secondary diagnoses	All of them, comma separated. CalMHSA decision **Open item**
34	Service date	On every line, inpatient included. **Open item**
35–36	Admission, discharge date	Inpatient lines only, from the program enrollment. DHCS Encounter Rules and Specifications (2026-04-30), "Service Type & Date Rules"; CalMHSA decision
37	Place of service	From the location; 99 on Expense lines. DHCS ISL Encounter Reporting Guidance v1.0, p.10; CalMHSA decision
38	Paid amount	The Charge column (service charge), with 2 decimals. CalMHSA decision

Inpatient lines: DHCS documents disagree on whether an inpatient line should carry a service date, whether a stay can be reported before discharge, and

whether a stay is one encounter or one per day. Today the screen sends the service date, an empty discharge date while the client is still enrolled, and one encounter per charge line. This is not yet decided.

DHCS Encounter Rules and Specifications (2026-04-30), "Service Type & Date Rules"; DHCS ISL Encounter Reporting Guidance v1.0, p.9 **Open item**

Open items

This section lists ISL behavior that may change. Each item says what SmartCare does today. Items are grouped by what they are waiting on. CalMHSA will update this guide, and the screen where needed, as answers are received.

Awaiting feedback from DHCS

Item	What SmartCare does today
More than one reportable line for one service (for example a denied Medi-Cal line and its self-pay line)	Refresh warns, but does not stop you from exporting both. Exporting both would report the same service twice. CalMHSA will share guidance on which line to report once it is available. Until then, review these lines before exporting.
Client CIN when the client has no Medi-Cal on the date of service	Sends the CIN from the client's Medi-Cal coverage in effect on the date of service, or else the most recent earlier one, even if that coverage has ended.
Inpatient lines	DHCS documents disagree on whether an inpatient line carries a service date, whether a stay can be reported before discharge, and whether a stay is one encounter or one per day. Today SmartCare sends the service date, an empty discharge date while the client is still enrolled, and one encounter per charge line.
Several services by the same provider to the same client on one day	Not combined. Each charge line is its own encounter.
Services locked out under the DHCS lockout tables	Not applied.
Housing codes	A multi-day housing service is sent as one encounter, not split into one encounter per day.
A Medi-Cal denial that is later rebilled or paid	Not yet decided whether the line should still count as reportable.
UMDAP and lines reportable under rule B (template, non-ISL code)	The UMDAP exclusion applies to self-pay lines (rule D) only.
Billing code for a self-pay line	Taken from the procedure rate SmartCare would use for a claim. Plan rates are preferred to standard rates, Medi-Cal plans first.
Crisis Stabilization (ISL101)	The template has two rows (1 unit and 23 units). The 23-unit row is used.
ISL301	Priced and reported.
Field formatting	A two-line street address is sent as one value with a line break. A 9-digit ZIP is sent with a hyphen (95815-1234). An Expense line with no diagnosis sends `UNKNOWN`. All secondary diagnoses are sent, even if one repeats the primary.
Void of an encounter accepted with an invalid county code	The Void repeats the county code DHCS accepted, even if that code (for example 00) is now treated as invalid.
First annual report due date	Services from 01/01/2027 to 06/30/2027 are due by the end of September 2027. DHCS documents give both September 28 and September 30; check current DHCS guidance for the exact date.

CalMHSA decisions in progress

Item	Current state
Production reporting start date	Expected to be 01/01/2027, matching the DHCS requirement.
Automatic Full Re-pickup in production	Off. Whether it will be used in production has not been decided.
Which roles hold each permission	The County Affiliate SysAdmin role has access. Permissions for other roles are not yet settled.
County code	SmartCare sends the two-digit county code from County Information. Confirming that this matches the DHCS county code for every county is in progress.
The *Answered* status	Which lines show this status is being confirmed.
Export for Review and unapplied	The review file uses the filter boxes as they are when you click the button, even if you did not click Apply Filter. Click **Apply Filter** first.

filters	

Not yet validated by SmartCare

SmartCare does not check these DHCS requirements today. A line can show *Yes* and still be rejected by DHCS for one of these reasons.

- Client date of birth.
- Quantity of at least 1.
- Place of service against the DHCS list of codes.
- Length of secondary diagnoses (DHCS allows 20 characters) and of race/ethnicity (50 characters). Longer values are sent in full.
- Rendering provider NPI on inpatient lines (none is sent).
- Discharge date on inpatient lines, and that the admission date is before the discharge date.
- Placeholder (pseudonym) clients, which DHCS does not allow. DHCS ISL FAQ (copy of 2026-09-17), p.7

FAQ and troubleshooting

I can't find the screen in the search.

The user's role may not have the screen permission. Add it to the role, then have the user log out and back in.

A button I expect is missing.

Buttons a user has no permission for are not shown. Check the permissions on the user's role.

The Export for Submission button is greyed out.

Tick at least one line **ready to export**: not yet sent, ISL Reportable *Yes* (not *Yes - Error*), not held back, or a staged Replacement, Void or resubmission. The count line above the grid shows how many are ready.

A line has a red ! and is "held back".

It looks ready but Export for Submission would refuse it. Hover the tick box to read why (for example it waits on an earlier Void, or a staged line's reason no longer holds). "All" leaves it out. Use the Export filter "Held back (!)" to list them.

A service I expected is not on the grid.

Check the service is Complete and dated within the last year, then click **Refresh Unsubmitted Encounters**. Also check your filters: the screen puts back the filters you last used, and if the filter box is collapsed, look for the yellow **Filters applied** note. A service dated before the reporting start is still listed, marked *No*.

Refresh says it "cannot tell what is new yet".

The first nightly Refresh has not finished. Use **Refresh Filtered Lines** for the lines you need. If this continues after the first night, contact CalMHSA.

I fixed the data but the line still shows the old value.

The Refresh Unsubmitted Encounters button sees only what it can tell has changed. Use the row's **Refresh** link or **Refresh Filtered Lines**, or wait for the nightly Refresh.

A line reads No. Why?

Hover over *No* to read the reason. See Reportability rules.

A line reads Yes - Error. What do I do?

Hover to see every problem. Fix the data in SmartCare (for example the client's address or race, or the clinician's NPI), then recheck it with its **Refresh** link or **Refresh Filtered Lines**. The line changes to *Yes* once nothing is missing.

Every reportable line shows a county code error.

The county code on County Information must be a DHCS county code from 01 to 58. Check it, or contact CalMHSA if you cannot. It is a county-wide setting, so a correction reaches the grid with the nightly Refresh or **Refresh Filtered Lines**. **Open item**

Refresh warned that a service has more than one reportable charge line.

Filter by that client or date to see the lines. Exporting all of them would report the same service to DHCS twice. Which line to report is awaiting DHCS guidance, and CalMHSA will share direction once it is available. Until then, review these lines before exporting. **Open item**

A sent line shows a "Changed" badge.

Its data changed since it was sent. Hover the Status to see what changed and what is suggested. Use Mark as Replacement, Mark as Void or Full Re-pickup, as suggested. Nothing changes at DHCS until you export.

Opening the screen ran a Refresh by itself.

CalMHSA has turned on automatic Full Re-pickup for your system. See Configuration settings. Anything it staged is pending until someone exports it.

The Status shows Submitted & Waiting for lines I uploaded days ago.

No answer has been recorded. Import the Encounters List from the ISL Portal, or record the portal's answer with Manually Accept or Manually Reject.

I exported a file but never uploaded it.

Tick its lines and use **Mark Not Sent**, as long as no line of the file has a DHCS result.

Import says the file is not valid, but it is the file I downloaded.

The file from Export for Submission is what you *send* to DHCS. Import reads the Encounters List you download from the ISL Portal.

I marked a line Void or Replacement by mistake.

Do not export it. Tick the pending line and use **Withdraw Pending**; the earlier line becomes current again.

Mark as Replacement says the line is no longer ISL reportable.

Something changed (for example the client gained Medi-Cal for that date). A Replacement is only allowed while the line is reportable. If the service should no longer be reported, use Mark as Void instead.

I manually rejected the wrong line.

Tick it and click **Remove Rejection**. This works only before you resubmit it and only for a rejection recorded on this screen.

Where is the warning text for an "Accepted with warnings" line?

Hover the line's Status.

Can I download a submission file again?

Yes, with the export permission: click the line's Submission ID, or use **Submissions** and click the file name (or tick up to 10 files for one ZIP).

A report shows a red sentence and no table.

The report refused the choices. The sentence names the box to correct. See ISL reports.

A message says to report something to support.

Note the time and the message, and contact CalMHSA.

Sources

DHCS documents

Document	Version	Date
Individual Service Level (ISL) Encounter Reporting Guidance	v1.0	2026-06-11
ISL Technical Documentation	v1.0; v1.1	2026-06-30; 2026-09-22
ISL Implementation Guide	v1.0; v1.1	2026-07-10 (v1.0 cover date); 2026-09-22
Individual Service Level Encounter — Frequently Asked Questions	no version shown	copy saved 2026-09-17
Encounter Rules and Specifications	no version shown	2026-04-30
ISL Encounter Fields workbook	v1.0	2026-06-10
ISL Code Library	no version shown	2026-06-17
ISL JSON schema and example template	no version shown	received with the documents above

Where DHCS documents disagree, this guide says so and lists the point under Open items.

CalMHSA decisions

Rules marked "CalMHSA decision" reflect CalMHSA's interpretation of DHCS guidance, or a design choice made for SmartCare where DHCS guidance does not settle the question.

Screen messages

Button labels, column headings, filter choices and messages are quoted from the screen. A few long messages are shortened with "…".