

Changing the Author of a Document Tip Sheet

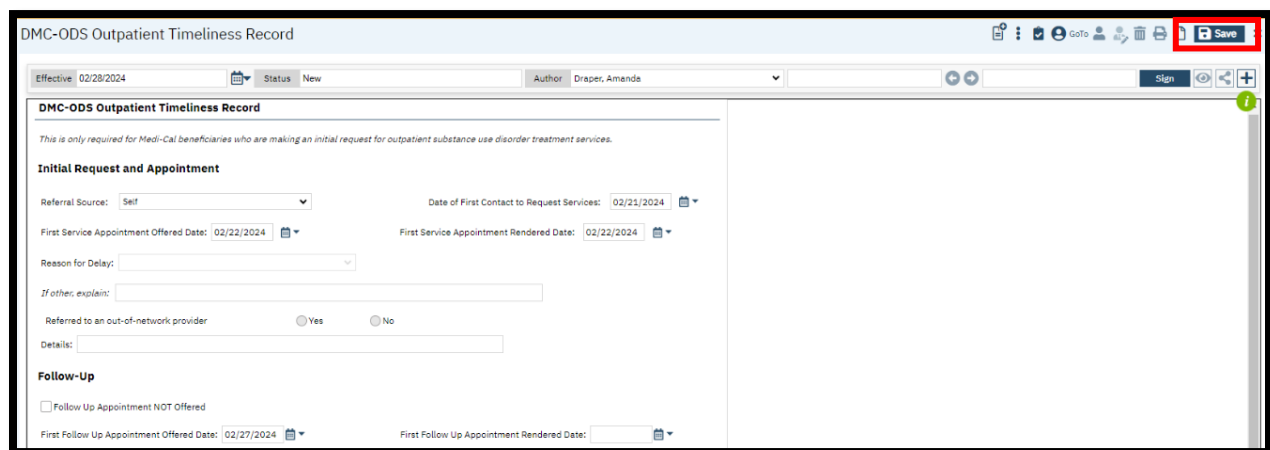
Most forms in SmartCare do not allow you to change the author. If the form includes documentation (an assessment or progress note) it will not allow you to switch the author. However, there are some documents where you can change the author (state reporting forms or the TADT). This tip sheet will walk you through how to make changes to the author so multiple people can work within the form. This tip sheet may change as training is updated. Please view our webpage for the most up to date version. If any additional help is needed, please contact us at bhs-ehrsupport@sacounty.gov.

What do I need to change the author on a form?

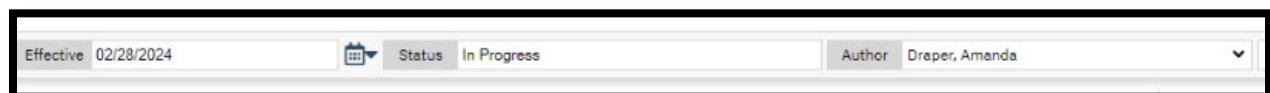
If admin staff start a state reporting document or TADT for a client, the clinician may be the one to finalize that form when they are working with the client. To have multiple people work on a single form, the author of that form will need to be changed once the form is ready to complete and sign. These steps are only necessary if the document was started by someone other than the person finalizing. These steps also will only need to be completed once the document is signed, they are not necessary for saving in-between.

Steps to change the author

1. The first user will complete their portion of the screen and then click *Save*.



2. Once the record has been saved the status will switch to In Progress. The user can close out the screen.



3. Once ready, the second user can search for the appropriate screen. It will show as a PDF document. Click the *Edit* button to open and update the screen.

DMC-ODS Outpatient Timeliness Record

Effective: 02/28/2024 Status: In Progress Author: Draper, Amanda Sign [Edit]

Document

Client: Test, Mariana
ID #: 800000128
DOB: 3/3/1993

DMC-ODS Outpatient Timeliness Record

Effective Date: 2/28/2024

This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services.

Initial Request and Appointment	
Referral Source:	Self
Date of First Contact to Request Services:	2/21/2024
First Service Appointment Offered Date:	2/22/2024
First Service Appointment Rendered Date:	2/22/2024
Referred to an out-of-network provider:	

4. Make any necessary updates, then click *Save*.

DMC-ODS Outpatient Timeliness Record

Effective: 02/28/2024 Status: In Progress Author: Draper, Amanda Sign [Edit] Save

DMC-ODS Outpatient Timeliness Record

This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services.

Initial Request and Appointment

Referral Source: Self Date of First Contact to Request Services: 02/21/2024

First Service Appointment Offered Date: 02/22/2024 First Service Appointment Rendered Date: 02/22/2024

Reason for Delay:

If other, explain:

Referred to an out-of-network provider ☐ Yes ☐ No

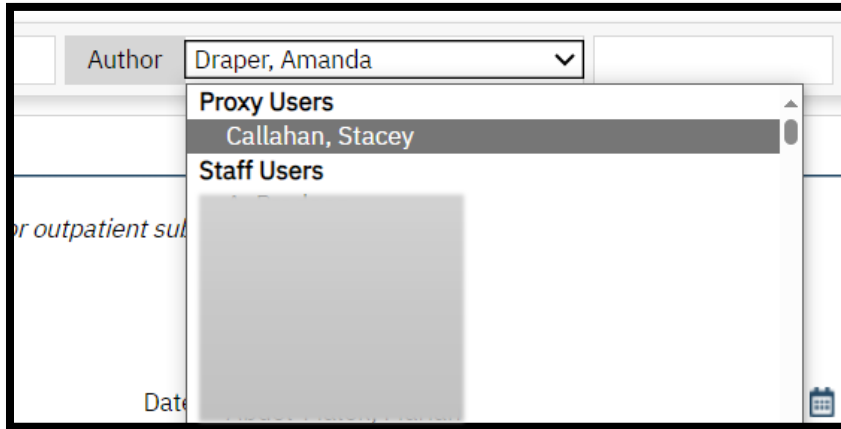
Details:

Follow-Up

☐ Follow Up Appointment NOT Offered

First Follow Up Appointment Offered Date: 02/27/2024 First Follow Up Appointment Rendered Date: 02/27/2024

- Once the screen has been saved, click on the *Author* drop-down. It will automatically take you to the current author's name. Begin typing in your last name, select your name once it pops up.



- Once you've selected your own name the *Sign* button will become enabled. Click Sign once the document is complete.

