Agenda

Electronic Health Record (EHR) MH User Forum

Date: March 28, 2024
Time: 1:00 to 2:30 PM
Location: Virtual using Zoom

Facilitator: Melony Ibarra

Scribe: Sambo Chhoeung

Attendees: (See sign in sheet)

Topic	Presenter	Start Time	Length

Welcome/Introductions
 	
• Zoom meeting overview
 	
• **Agencies attended:**
 	
    o **Capital Star**
    o **UCD**
    o **Paradise Oaks**
    o **APCC**
    o **River Oak**
    o **APCC**
    o **Hope Cooperative**
    o **MHTC**
    o **El Hogar**
    o **Pacific Clinics**
    o **Telecare**
    o **Heartland**
    o **Mercy San Juan CSU**
    o **SCH**
    o **La Familia**
    o **BACS**
    o **Turning Point**
    o **River Oak**
    o **Dignity Health**
    o **HEART**
    o **CAPS**
    o **Sierra Vista Hospital**
    o **Access**
    o **El Hogar**
    o **Progress Ranch**
	Melony	1:00 PM	5 min

- o **Alternative Family Services** - o **Stanford** - o **CST** - o **Hope Center** • Support/Training Registration and Billing Mailbox - o **Support**: BHS-EHRSupport@saccounty.gov - o **Training Registration**BHS-EHRTrainingReg@saccounty.gov - o **Billing** BHS-EHRBilling@saccounty.gov			
Medi-Cal/Medicare Claiming/Fiscal Update • Avatar Claiming Status Update – Currently we are claiming everything up to June 30th of 2023 • Avatar Claims Correction Spreadsheet (CCS) - CCS are currently being completed 4 weeks from the date submitted. Reminder to use the new CCS reference sheet on our website - Claiming (saccounty.gov) for services provided before 6/30/23 if you have not been doing so. • Avatar Pre-Billing Maintenance - Reminder to run the Pre-Billing Maintenance Report, Phase II Report, Client and Program, Manual Posting by Program Report, and the Client Ledger Sac to work your denials. • Avatar Reminders – Reminder to enter a valid zip code. If you do have a client that is homeless, you can have Homeless in the address line but make sure that it is under Address 1 line. • SmartCare MediCal update – We have claimed services through December 2023 • SmartCare Medicare update – We have claimed services through December 2023 as well • SmartCare Claims Correction Spreadsheet (CCS) – Please do not use Avatar Payor numbers for SmartCare CCS and only use SmartCare names when submitting the CCS. • SmartCare Coverage Screen (Medicare Beneficiary ID & Group #) – When adding a coverage for Payor, the only field that you should be entering the policy number is in the Insured ID field. Please do not enter it in the Medicare Beneficiary ID field or anything in the Group Number. • SmartCare Reminders – In SmartCare, when end-dating OHC payors, please end date the last date of the month that the client had coverage. This applies to Medicare as well.	Richard	1:05 PM	10 min
ECM Claiming	Mike	1:15 PM	5 min

- SmartCare Claiming Updates - We submitted claims through January 2024 for Healthnet and Anthem and are awaiting adjudication. (SAC) Reports in SmartCare - ECM and Outreach Counts – This will show you how many times your program has performed or attempted an ECM outreach service to a client. - Program Coverage Report (SAC) – This report shows the date that the client was enrolled and the coverage the client has or had during that date range. - Service Diagnosis Error (SAC) – This report will show you errors that are related to the diagnosis, discrepancies with the diagnosis dates, or if the client is missing a diagnosis. - Entering Managed Care Guarantors in SmartCare – Some providers have been entering the MediCal guarantor instead of the Managed Care guarantors. When entering new ECM services, please remember that all Managed Care plans will start with "Managed Care". - Reminder to run your ECM Pre Billing Reports in Avatar for PY Services			
TADT Update – Stop using the CSI Assessment - Reminder to stop using the CSI Assessment screen. The screen should be deactivated now. - MH Non-Psychiatric SMHS Timeliness Record (Client) & MH Psychiatric SMHS Timeliness Record (Client) - Reminder to continue with the TADT in SmartCare. This is what the State will be looking at for our timeliness so we want to make sure it's being completed on every new client coming into the system. We have had 671 Mental Health outpatients TADTs done. We have 843 Mental Health outpatient and are at around 27% of those that were enrolled during the same timeframe. Please continue completing these as you open clients. A new client is considered someone who hasn't had services in 1 year.	Dawn		
SmartCare Support - Please reach out to us for support questions at BHS-EHRSupport@saccounty.gov - New Special Population – We have a new Special Population added called MH-Involved With Court Programs - Known Issue - Inquiries & Client Programs Screen – Any screen with a staff drop down, some user will experience issues that will time them out. We are currently working with CalMHSA to resolve this issue. - New Document Categories for scanning – There are some new document categories to select for scanning. Some of the document categories that were previously in Avatar have been added to SmartCare. These are now available	Justin	1:30 PM	15 min

through the scanning screen.			
SmartCare Reports • See Release Items	John	1:45 PM	15 min
CalAIM • Please continue to send all questions to BHS-ECM@saccounty.gov • Continue to email questions/concerns/Anthem Success Stories to BHS-ECM@saccounty.gov • Next MHP/SUPT ECM Provider Meeting: April 4,2024 at 9:00am	Dana	2:05PM	5 min
Training Updates • Training schedules have been posted through May • Provider Corrections Training – Starting in April we will be providing the Provider Corrections Training twice a month in the afternoon at 1pm, after the Provider Admin Training. The Provider Admin Training is a pre-requisite and required in order to register for Provider Service Corrections Training. Please register only the staff who will be working service denials and corrections in the EHR for Provider Service Corrections training. • Training Slides – We post the most up-to-date Training Slides on our webpage under the Sacramento County Training section. We have the Provider Admin Training slides and Provider Service Corrections slides currently posted. We plan to have a version date on the slides so that you will be able to know which version you are looking at for your reference. • 1:1 User/Trainer Sessions – We have added 1:1 support session back to the training schedule. If you are interested in having your staff set up a session, please reach out to our Training registration desk. The session will be via Zoom. • Hands-on access to SmartCare TRAIN Environment – If new staff need hands-on access to the system, they can get hands-on access to the TRAIN environment. Our TRAIN environment has recently been refreshed so it is up to date. If you would like your staff to have access to the TRAIN environment, please reach out to the Training registration Desk. We do not give access to both the LIVE and TRAIN environment at the same time so the LIVE environment will be deactivated while the staff is accessing the TRAIN environment. • CalMHSA LMS Knowledge Base – On the SmartCare Training Resources section of our webpage under CalMHSA Resources, you will find a link to the CalMHSA LMS Knowledge Base. This page provides a ton of resources for SmartCare that include screenshots and tip sheets. • Upcoming MH User Forums – the next MH User Forum	Kat	2:10PM	10 min

will be on Thursday, May 23rd at 1pm.			
Open Forum • When submitting CCS, other health care coverages have corresponding numbers in parathesis, can we these numbers or should we type in the name? – Please put the description if you want to use the corresponding number. That will ensure us that we are transferring to the correct payor. • Do we use DMC instead of Mental Health? – If you are a provider that is on both SUPT and MH services, it would depend on your program that you are working for at that moment. • Is there an update for ECM for Aetna? – Aetna is on hold right now. The clearing house that we were using had a breach and are in the middle of fixing it. We are trying to find an alternative to submit claims. • Are we still completing the CSI Standalone Collection? – Yes, this should still be completed since it is the demographic information. • We have some old Timeliness to enter prior to 2/1/24, should we use the new tool for these as well? – Yes, please make sure to use the new tool. • If a CSI Assessment was started prior to 2/1, should it be completed in the CSI Assessment form or move it to the new Timeliness tool? – It would need to be transferred to the new Timeliness form and the CSI Assessment will need to be deleted. • When we submit a CCS, how long does it take to submit this to the State? Our goal is to process CCS 2 weeks from receiving them. There is a large number right now because we submitted lot of claims in a short timeframe but you should receive a response from us in a few weeks regarding the status of your CCS. • For the new categories for scanning, will we be able to move over current document to these categories? – You will need to delete it and re-upload it. • Can we scan documents prior to July 2023 into SmartCare if not scanned into Avatar? – Yes, anything that is relevant to treatment and your client's journey to recovery can be scanned in using the Document Categories that we've added. • Is it possible to have a TRAIN account for internal training? – No, only specific individuals/users can have TRAIN accounts before they have a live account or instead of their live account. We limit this because we have had instances of users putting the wrong information into the wrong environment when they had access to both. We also need to make sure that the specific individual/user has the correct permissions in our TRAIN environment. • Is there an update on duplicate services that weren't	All	2:25 PM	5 min

rolling up because the place of the service was different? – We don't have an update yet. We are still working with CalMHSA for this fix. • When a client gets admitted and their medi-cal shows incarcerated, what is the process for these clients for billing? – If the client was incarcerated that is a true denial and there is no fix. When we claim to the state, they adjudicate based on the eligibility that is show at the time the service was claimed. If the client wasn't incarcerated you will need to work with the client or eligibility worker to update their status and then do a replacement. We would suggest not putting in the payor until that person is Medical eligible to avoid denials but this will require tracking on your program's end. • If one agency does the UMDAP for one client and they get discharged and go to a different agency, the new agency does a new UMDAP, will this erase everything that the previous agency did? – We will look into this and report at the next User Forum.			

SCANNED DOCUMENT MANAGEMENT

SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
Access	Access Referral	Mental Health Service Request Form (Date)	
Access	Detailed Authorization for Out of County Clients	Detailed Auth for OOC (Date)	
Access	Hospital Appointment Letters	Hospital Appointment Letters (Date)	
Access	Unable to Contact Letters	Unable to Contact Letters (Date)	
Access	Presumptive Eligibility Letters (AB 1299)	PT Eligibility (AB1299) (Date)	
Access	Service Authorization Requests (SARs)	SAR (Type of SAR) (Date)	
Assessments	3Ms	3M (Date)	This will become historical if/when the functionality works in SmartCare.
Assessments	CalWorks Assessments	CalWorks Assessment (Date)	
Assessments	Clinical Assessment Tools	Clinical Assessment Tools (Name of Document)(Date)	
Assessments	Historical Core Assessments	Core Assessment (Date)	
Assessments	IP-CANS	IP-CANS (Date)	Used for documents prior to 7/1/23.
Assessments	KETs	KET (Date)	This will become historical if/when the functionality works in SmartCare.
Assessments	Level of Intensity Screening Tool (LIST)	LIST (Date)	
Assessments	PAF	PAF (Date)	This will become historical if/when the functionality works in SmartCare.
Assessments	QI Assessment for STRTPs	QI Assessment STRTP (Date)	
Assessments	Strengths Assessments and Personal Empowerment Plans	SA (Date); Assessments- PEP (Date)	
Assessments	Sacramento County ECM Comprehensive Assessment Form	Sacramento County ECM Comprehensive Assessment Form (Date)	
Benefits Acquisition	Applications for SSI / Medi-Cal	SSI Applications/Medi-Cal (Date)	
Benefits Acquisition	MD SSI forms	MD SSI Forms (Date)	
Benefits Acquisition	Physician's/Medical Officer's Statement, Patient's Capacity to Manage Benefits	Physician's/Medical Officer's Statement, Patient's Capacity (Date)	Patient's Capacity to Manage Benefits
Benefits Acquisition	Requested Information for SSI	Requested Info for SSI (Date)	
CFT Info	CFT Action Plans	CFT Action Plans (Date)	
CFT Info	CFT Minutes	CFT Minutes (Date)	
CFT Info	TDMs	TDMs (Date)	
Client Correspondence	Med lists sent to PCP or another provider	Outgoing Correspondence-Med lists sent to PCP (Date)	
Client Correspondence	Patient Notes and Letters	Pt. Notes and Letters (Date)	
Client Correspondence	Client Voter form	Voter Form (Date)	
Collateral Documents	Access Forms, Faxes and Correspondence	Access Forms, Faxes and Correspondence (Date)	
Collateral Documents	Approval of Prescription Drug Coverage	Approval of Prescription Drug Coverage (Date)	
Collateral Documents	Assessments/Evaluations from State Hospitals	Assessments/Evaluations from State Hospitals (Date)	
Collateral Documents	AWOL Report	AWOL Report (Date)	
Collateral Documents	CRP Extension Requests (past 30 days)	CRP Extension Requests (past 30 days) (Date)	
Collateral Documents	Group sign off document	Group Attendance Sheet (Name of Group/Date/Time)	
Collateral Documents	Leave of Absence	Leave of Absence (Date)	
Collateral Documents	LOCUS' Completed by other agencies	Historical LOCUS' Completed by other agencies (Date)	
Collateral Documents	LOCUS Hospital Packets at time of linkage	Historical LOCUS Hospital Packets at time of linkage (Date)	
Collateral Documents	PCP Records	PCP Records (Date)	
Collateral Documents	Progress Notes and discharge summaries from other agencies (Not Hospitals)	Progress Notes, D/C summaries from other agencies (Date)	Does not include inpatient/hospital documents
Collateral Documents	Quarterly Report to CPS	Quarterly Report to CPS (Date)	
Collateral Documents	Service Requests/FAST Referral and collateral documents	Historical Service Requests/FAST Referral and collateral documents (Date)	
Court/Legal	5150	5150 (Date)	
Court/Legal	1570 Form for Commitment to State Hospital	1570 Form for Commitment to State Hospital (Date)	
Court/Legal	5150 Involuntary Patient Advisement	5150 Involuntary Patient Advisement (Date)	
Court/Legal	5250 – Notice of Additional 14-day Certification	5250 – Notice of Additional 14-day Certification (Date)	
Court/Legal	5250 Certification Review Hearing – Record and Decision (yellow sheet)	5250 Certification Review Hearing – Record and Decision (Date)	Yellow sheet
Court/Legal	5270 Certification Review Hearing – Record and Decision (yellow sheet)	5270 Certification Review Hearing – Record and Decision (Date)	Yellow sheet
Court/Legal	5270 Notice of Additional 30-day Certification	5270 Notice of Additional 30-day Certification (Date)	
Court/Legal	Advance Medical Directive	Advance Medical Directive (Date)	
Court/Legal	Affidavit of Identity for U.S. Citizen or National	Affidavit of Identity for U.S. Citizen or National (Date)	Will be named 1570 for NSH (Napa State Hospital), PSH (Patton State Hospital), etc.

SCANNED DOCUMENT MANAGEMENT

SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
Court/Legal	Clinician's Affidavit for Suicidal Patient	Clinician's Affidavit for Suicidal Patient (Date)	
Court/Legal	Conservatorship papers in chronological order (TCON Referral from MHTC) (TCON Granted from court)	Conservatorship papers (MHTC) (Date)	(TCON Granted from court): In chronological order. TCON Referral from MHTC.
Court/Legal	Court Document Appointing guardianship of a minor	Court Document Appointing guardianship of a minor (Date)	
Court/Legal	Court Orders	Court Order (Date)	
Court/Legal	Court-Related Documention that is attached to a Service Request	Court Related Document (Name of Document) (Date)	
Court/Legal	Family Court Documents (Custody, Visitation, Etc.)	Family Court Documents (Custody, Visitation, Etc.) (Date)	
Court/Legal	Guardianship Documents	Guardianship Documents (Date)	
Court/Legal	Mental Health Court Documents	Mental Health Court Documents (Date)	
Court/Legal	Mental Health Facilities Report of Firearms Prohibition – DOJ form	Mental Health Facilities Report of Firearms Prohibition – DOJ form (Date)	
Court/Legal	Notice of Adverse Benefit Determination (NOABD)	NOABD (Type) (Date)	
Court/Legal	Notice of Certification Hearing (to Patient - 5250,5270,etc.)	Notice of Certification Hearing (to Patient - 5250,5270,etc.) (Date)	
Court/Legal	Notice of Intent to Request Conservatorship (NOI)	Notice of Intent to Request Conservatorship (NOI) (Date)	
Court/Legal	Order for Post certification Treatment of Imminently Dangerous Person - Hearing Results	Order for Post certification Treatment of Imminently Dangerous Person - Results (Date)	
Court/Legal	Patient Notification of Firearms Prohibition and Right to Hearing	Patient Notification of Firearms Prohibition and Right to Hearing (Date)	
Court/Legal	Petition for Post certification Treatment of a Dangerous Person	Petition for Post certification Treatment of a Dangerous Person (Date)	
Court/Legal	Physician's Affidavit for a Dangerous Patient	Physician's Affidavit for a Dangerous Patient (Date)	
Court/Legal	Physician's Affidavit for Suicidal Patient	Physician's Affidavit for Suicidal Patient (Date)	
Court/Legal	Proof of Service -Physician's Affidavit for a Dangerous Patient	Proof of Service -Physician's Affidavit for a Dangerous Patient (Date)	
Court/Legal	Request For Hearing For Relief From Firearms Prohibition	Request For Hearing For Relief From Firearms Prohibition (Date)	
Court/Legal	Subpoenas	Subpoenas (Date)	
Court/Legal	Tarasoff	Tarasoff (Date)	
Court/Legal	Voluntary Consent for Treatment/List of Patients Rights	Voluntary Consent for Treatment/List of Patients Rights (Date)	
Court/Legal	1370 (Restoration of Competency-Misdemeanor)	1370 (Restoration of Competency-Misdemeanor) (Date)	Court/Legal Sensitive Information
Court/Legal	Commitment Order for 1370	Commitment Order for 1370 (Date)	Court/Legal Sensitive Information
Court/Legal	Conservator Request for transport form	Conservator Request for transport form (Date)	Court/Legal Sensitive Information
Court/Legal	CPS Reports (Juris, Dispo, Status Review, Etc.)	CPS Reports (Juris, Dispo, Status Review, Etc.) (Date)	Court/Legal Sensitive Iinformation
Court/Legal	ECT	ECT (Date)	Court/Legal Sensitive Information
Court/Legal	Health and Education Passport (HEP)	Health and Education Passport (HEP) (Date)	Court/Legal Sensitive Information
Court/Legal	Law Enforement Reports (patient or staff files report on another patient) Do not put names of both in one chart!!!Use white out!	Law Enforcement Reports (Patient/staff report on another patient) (Date)	Court/Legal Sensitive Information
Court/Legal	M.D. Letter to Court re: 1370s	M.D. Letter to Court re: 1370s (Date)	Court/Legal. Sensitive Information
Court/Legal	Public Guardian's Letter of High Risk to Provider	Public Guardian's Letter of High Risk to Provider (Date)	Court/Legal Sensitive Information
Court/Legal	Riese - (Medical Capacity Hearing)	Riese - (Medical Capacity Hearing) (Date)	Court/Legal -Sensitive Information
Court/Legal	Sex Offender Address Update (to Sheriff or other LE)	Sex Offender Address Update (to Sheriff or other LE) (Date)	Court/Legal Sensitive Information
Court/Legal	Superior Court -Index Search System Results	Superior Court -Index Search System Results (Date)	Court/Legal Sensitive Information: ISU intake gets copy from Facility Liaison. ISU can scan upon admit of 1370.
Court/Legal	Writs	Writs (Date)	Court/Legal Sensitive Information
EBP Related Documents	EBP Related Documents/Screenings	EBP Related Documents/Screenings (Specific Name) (Date)	
EBP Related Documents	Personal Empowerment Plan (PEP)	Personal Empowerment Plan (PEP) (Date)	
EBP Related Documents	Strengths Assessment (SA)	Strengths Assessment (SA) (Date)	
Education/Employment	504 Plans	504 Plan(s) ((Date)	
Education/Employment	Avatar Vocational Assessment	Vocational Assessment (Date)	
Education/Employment	Behavior Support Plans	Behavior Support Plans (Date)	
Education/Employment	DOR Psychiatric Summary (signed by a licensed staff)	DOR Psychiatric Summary (signed by a licensed staff) (Date)	
Education/Employment	DOR/Crossroads Papers	DOR/Crossroads Papers (Date)	
Education/Employment	EC Prescription Referral Form	EC Prescription Referral Form (Date)	
Education/Employment	EC Release of Information	EC Release of Information (Date)	
Education/Employment	IEP (Individualized Education Plan)	IEP (Individualized Education Plan) (Date)	
Education/Employment	School Records (Report Cards, etc.)	School Records (Report Cards, etc.) (Date)	
Education/Employment	SSTs	SSTs (Date)	
Financial Eligibility	Advanced Beneficiary Notice (ABN)	Advanced Beneficiary Notice (ABN) (Date)	
Financial Eligibility	Agreement to Pay (ATP) – white copy (Historical Document Replaced with FIF in 2016)	Agreement to Pay (ATP) (Date)	Historical Document Replaced with FIF in 2016
Financial Eligibility	Correspondence from Social Security (i.e. change of payor/payee)	Correspondence from Social Security (Date)	(i.e. change of payor/payee)
Financial Eligibility	Insurance Face sheet	Insurance Face sheet (Date)	
Financial Eligibility	Medical Screen from the Meds System	Medical Screen from the Meds System (Date)	
Financial Eligibility	VA Contact Sheet	VA Contact Sheet (Date)	

SCANNED DOCUMENT MANAGEMENT

SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
Financials	Financial Information Form (FIF)	Financial Information Form (FIF) (Date)	
Financials	UMDAP	UMDAP (Date)	
HIPAA	Acknowledgement of Receipt	Acknowledgement of Receipt (Date)	
HIPAA	Accounting Of Disclosures	Accounting Of Disclosures (Date)	
HIPAA	Client Request for Access to Health Record and M.D. Approval form	Client Request for Access to Health Record and M.D. Approval form (Date)	
HIPAA	Notice of Privacy Practices	Notice of Privacy Practices (Date)	
HIPAA	Privacy Policies by Year	Privacy Policies by Year (Date)	
HIPAA	Request to Amend Records and Approved or Denied Response Forms	Request to Amend Records and Approved or Denied Response Forms (Date)	
Historical Chart Documents	All Historical Documents Prior to Avatar	Historical Documents prior to SmartCare (Date)	Please label the Clinical Introductory Note and the Initial Psychiatric Assessment
Historical Chart Documents	Client Merge Notification	Client Merge Notification (Avatar) (Date)	
Homeless Doc	Chronic Homelessness Verification Form	Chronic Homeless Verification Form (Date)	
Homeless Doc	Disability Certification	Disability Certification (Date)	
Homeless Doc	Proof of Income (No Income, Public Assistance, SSI Award Letter, Employment)	Proof of Income Paperwork (Date)	
Homeless Doc	Rent Assistance Calculator	Rent Assistance Calculator (Date)	
Homeless Doc	Service Animal/Companion Animal Certification	Service Animal Document (Date)	
Homeless Doc	Third Party Homeless Verification	3rd Party Homeless Verficiation (Date)	
Hospital Discharge Paperwork	Hospital Discharge Paperwork (including Psychiatric hospitals)	Hosptial Discharge Paperwork (Date)	
ID/Insurance Cards	Identification card	ID Card (Date)	
ID/Insurance Cards	Insurance Card (e.g., Medi-Cal, Medi-Care, Insurance card photocopies)	Insurance Card and photocopies (Date)	
ID/Insurance Cards	Miscellaneous card (i.e., UCDMC card)	Miscellaneous Cards-(Name of Card) (Date)	
Incoming Correspondence	Medical Records Requests	Medical Requests Request (Date)	
Inpatient	Concurrent Review Documents	Concurrent Review Docs (Date)	
Inpatient	Inpatient UR Tool	UR Tool (Date)	
Inpatient	TAR	TAR (Date)	
Intake Paperwork	Ambulance packet	Ambulance packet (Date)	
Intake Paperwork	ISU Nurse to Nurse Patient Final Arrival Screening	ISU Nurse Arrival Packet/Screening (Date)	
Intake Paperwork	JV 583 Form	JV 583 from (Date)	
Intake Paperwork	Reception Patient Worksheet	Reception Patient Worksheet (Date)	
Intake Paperwork	Referral Packets - clients accepted	Referral Packets (Date)	ISU: Should be included in Intake packet
Intake Paperwork	TFC Referral Form & Screening Tool	TFC Referrel & Screening Tool Document (Date)	TFC Referral Form & Screening Tool into TFC Episode
Intake Paperwork	VA contact sheet	VA Contact Sheet (Date)	(Admitted MHTC, Crestwood Intake Scans)
Labs	EKG Results	EKG Results (Date)	
Labs	Laboratory Results	Lab Results (Date)	
Labs	PPD Results letter	PPD Results (Date)	
Labs	Pregnancy Tests	Pregancy Test Results (Date)	
Labs	TB test results	TB Test Results (Date)	
Labs	X-Ray Results	X-Ray Results (Date)	
Medication Consent	CURES	Cures (Date)	
Medication Consent	Informed Consent for Treatment with Psychotropic Drugs	Informed Consent-Psychotropic Drugs (Date)	
Medication Consent	JV220 Documents	JV220 Documents (Date)	
Medication Consent	Medical Practitioner (MD, PA, etc) notes	Medical Notes	Historical
Medication Consent	Client Prescription Refill Request	Prescripion Refill (Date)	
Medication Consent	Prescriptions	Perscriptions (Date)	
Medication Consent	Psychiatric Referrals	Psychatiric Referrals (Date)	
MHTC	Billing/Response letters to billers	Billing/Response Letters (Date)	MHTC
MHTC	Client Merge Notification	Client Merge Noticiation (Date)	MHTC Only
MHTC	Denial of Rights Documentation Record- 15 min. Pink sheet	Deniel Rights Packet (Date)	MHTC - (pink sheet)

SCANNED DOCUMENT MANAGEMENT

SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
MHTC	Interview Summary from Crisis Residential	Interview Summary of Crisis Residential (Date)	
MHTC	Law Enforcement / MCST FAST Form	Law Enforcement/MCST FAST Form (Date)	
MHTC	MARs (Treatment/Standing and PRN)	MARS (Date)	Title type of MAR separately (TX,PRN/Standing) and put date range
MHTC	MHTC Accounting of Disclosures	MHTC Accounting of Disclosures (Date)	MHTC Only
MHTC	MHTC Medical Consultation Request and documentation back from ED or outpatient appointment	MHTC Medical Consultation Request (Date)	Stamp individual RX as scanned and place in hard chart on unit
MHTC	MHTC Subpoenas	MHTC Subpoenas	If no ROI be sure to record release of records to County Council on Accounting of Disclosures
MHTC	Missing Persons Form	Missing Persons Form (Date)	MHTC Only
MHTC	Letter from MHTC M.D. or clinician (Not related to 1370 or Benefits, i.e. letter to employer to excuse from work due to hospitalization)	Letter from MHTC MD (Date)	
MHTC	Property Reports / signed	Property Reports	
MHTC	Property Request Forms	Property Requests	
MHTC	All Physician Orders	Physican Orders (Date)	Scan all MD orders as one document and title with date range
MHTC	Provider Behavioral Plans/ISU MD Letter to ERs	Provider Behavioral Plans & ISU MD Letter (Date)	MHTC Only
MHTC	Red Alert Sheets	Red Alert Sheets (Date)	MHTC Only
MHTC	MHTC Referral Packets - clients NOT accepted	Referral Packets (Date)	
MHTC	Seclusion or Restraint Patient Debriefing	Seclusion or Restraint Patient Debriefing (Date)	
MHTC	Sleep Log	Sleep Log (Date)	
MHTC	Tarasoff Forms	Tarasoff Documents (Date)	MHTC Only
MHTC	Termination of Conservatorship (if client is not inpatient at the time)	Termination of Conservatorship (Date)	MHTC Only
Non-Medication Consent	Consent for HIV Testing	Consent for HIV Testing (Date)	
Non-Medication Consent	Consent to Photograph	Consent to Photography (Date)	
Non-Medication Consent	Consent to treat (MERT)	Consent to Treat (MERT) (Date)	
Non-Medication Consent	Consent to Treat (Other)	Consent to Treat (other) (Date)	
Non-Medication Consent	Individual Consent	Individual Consent (Date)	
Non-Medication Consent	Informed Consent to Treat	Informed Consent to Treatment (Date)	
Non-Medication Consent	JCE 366	JCE 366 (Date)	
Non-Medication Consent	Minor Consent Form	Minor Consent (Date)	
Non-Medication Consent	Telehealth Consent	Telehalth Consent (Date)	
Non-Medication Consent	Telepsychiatry Consent	Telepsychiatry Consent (Date)	
Non-Medication Consent	Therapy Consent	Therapy Consent (Date)	
Plans	Behavioral Contract	Behavioral Contract (Date)	Once signed by patient, this will be scanned
Plans	Client Plan (if signature was obtained later, if Avatar was offline, etc.)	Historical Client Plan (with signature) (Date)	
Plans	Discharge Plans	Discharge Plans/Summaries Paperwork (Date)	
Plans	Crisis Residential Weekly Updates	Crisis Residential Weekly Updates (Date)	
Plans	Inpatient Program Schedule	Inpatient Program Schedule (Date)	
Plans	ISU Team Discharge Instructions for Minors	ISU Team Discharge Instructions for Minors (Date)	
Plans	Mental Health Wellness Plan	Mental Health Wellness Plan (Date)	
Plans	MHSA Client Housing Plan	Historical MHSA Client Housing Plan (Date)	
Plans	Safety Plans	Safety Plans (Date)	If not using the Safety Crisis Plan within SmartCare.
			Providers with their own EHR will upload documentation supporting medical necessity for children/youth presumptively transferred to Sacramento
Providers with their own EHR	Client Plans	Client Plans (Date)	
Providers with their own EHR	Core Assessments	Core Assessment (Date)	
Providers with their own EHR	Initial Psychiatric Assessments	Initial Psychiatric Assessments (Date)	
Providers with their own EHR	Medication Service Plans	Medication Service Plans (Date)	
Providers with their own EHR	TBS Adjunct Client Plan	TBS Adjunct Client Plan (Date)	
Referrals for Other Services	Intensive Services Referral (LOCUS)	Intensive Services (LOCUS) (Date)	
Referrals for Other Services	RX from other agencies (i.e. RX from Med Clearance)	Rx-other agencies (Date)	
Referrals for Other Services	DHCS Transition of Care Tool	Transition of Care Tool (Date)	
ROI	Access Team or SOC ROI	Access Team/SOC (Date)	

SCANNED DOCUMENT MANAGEMENT

SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
ROI	Any ROI	Name of ROI Entity (Date)	
ROI	Family Notification	Family Notification (Date)	
ROI	MDT ROI	MDT	
Screening	ISU Patient Tuberculosis and Heath Questionnaire	Screening-ISU Patient Tuberculosis and Heath Questionnaire (Date)	
SOC	System of Care (SOC) Authorization	SOC Authorization for Services (Date)	
SOC	SOC Referral	SUPT Service Request Form (Date)	
SUPT	CIWA (Alcohol Assessment by M.D.)	CIWA/COWS (Date)	
SUPT	Medical clearance or Physician letters	Physicals from MDs (Date)	
Termination/Exit Documents	After Care Form	After Care Form (Date)	MHUCC
Termination/Exit Documents	Photographs (i.e. injuries, etc.)	Photographs (Date)	
Testing/Evaluation	Psychiatric Tests	Psychiatric Test (Date)	
Testing/Evaluation	Psychological Assessment Summary	Psychological Assessment Summary (Date)	
Testing/Evaluation	Psychological Tests	Psychological Test (Date)	