

How to Submit a Service Authorization Request Tip Sheet

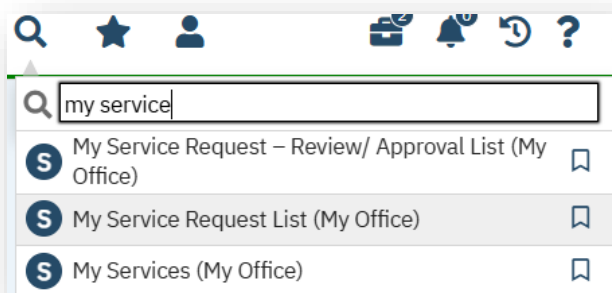
This Tip Sheet is for Providers of the EHR and will go through the process of submitting a service authorization request to BHS SAC. This Tip Sheet may change as our trainings and systems are updated. Please visit our website

<https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at bhs-ehrsupport@saccounty.gov.

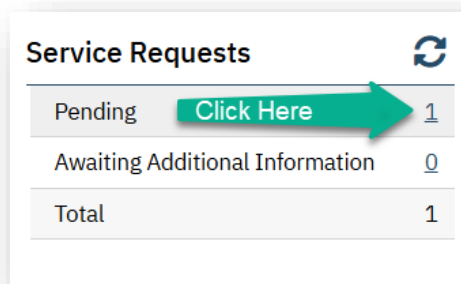
Follow the steps below for both initial authorization request and reauthorization request.

1. Search for **My Service Request List (My Office)**. If there are any requests pending submission, you can also click on the pending link from your Service Requests widget.

Through the **Search** feature:



Through the **Widget**:



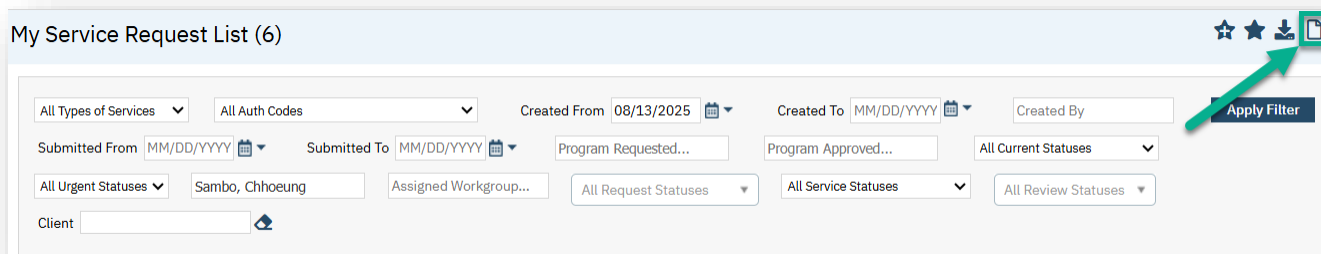
The widget will show items in the following statuses:

Pending – Requests that have been saved as *Pending* but has not been submitted.

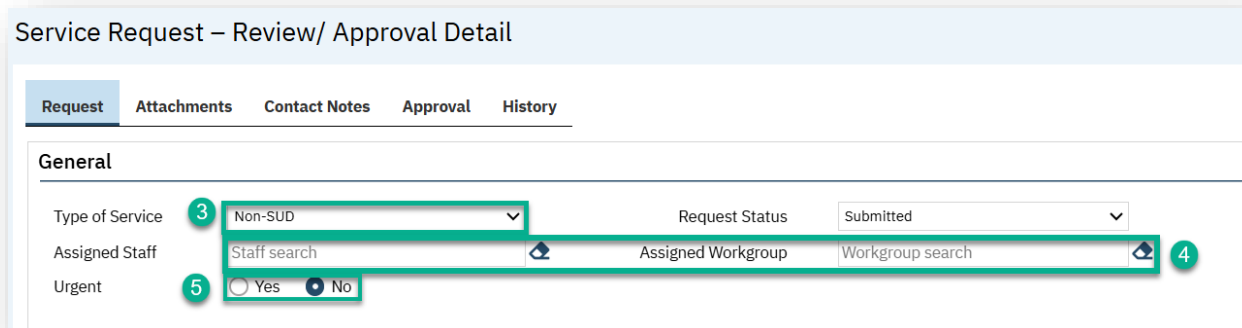
Awaiting Additional Information – Requests sent back to the provider from the *Approver*.

The Service Requests widget will need to be added to the dashboard. Follow CalMHSA's guide to add widgets to the dashboard: <https://2023.calmhsa.org/how-to-add-a-widget-to-the-dashboard/>

2. Either of these options will take you to the My Service Request List page. From here, you will click on the **New Icon** in the upper right-hand corner of the screen to start a new request. This will open the Service Request Detail screen.



3. From the Type of Service field dropdown select Non-SUD.



4. In the **Assigned Workgroup field**, search and select the workgroup. When requesting a service authorization from the BHS SAC team, select **BHS SAC Service Auth** workgroup. When requesting Therapeutic Foster Care services, select the TFC Workgroup.
5. Select the appropriate Urgency. This field will default to “No” if unselected.

Fill out Service Request Details

Service Request Details

6

Auth Code

Please select authorization code... ▼

Program Requested

▼

✎

7

8

☒ Units

0

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9

☐ \$

i

From

▼

📅

To

▼

📅

10

11

Frequency

▼

Units Total

0

\$ Total

12

Justification

Reason for requesting more information

Insert

Clear

6. **Auth Code:** From the dropdown, select the appropriate Authorization Code for the services you are requesting.
7. **Program Requested:** Selecting the program that you request to provide the services. If you are unsure of which program to request, you can leave this box blank and then leave a comment in the justification box for BHS SAC to select the program.
8. **Units:** This field requires a value to be entered but since we don't necessarily use it, enter 0.
9. **\$:** Leave blank.
10. **From/To:** Based on the Auth Code you are selecting, enter the date range requested for the service. Please refer to Sacramento County's BHS Quality Management Authorization Requests P&P located here: [Authorization Requests](#).
11. **Frequency:** Select the appropriate frequency based on the Auth Code chosen.
12. **Justification:** Enter the justification for your service authorization request.

13. Click **Insert**

Insert

Clear

Auth List

	Auth Code	Program Requested	Units	From Date	To Date	Frequency	Total Units	Justifica
X	<input type="radio"/> Test Auth Code	HeartLand-TBS-Grand(472)	1	10/02/2025	01/02/2026	2 days/week	28	Justificati

Created By:Created Date/Time:Submitted Date/Time:

14. After clicking on Insert, the created request will then appear on the screen in the Auth List.

Auth Code

Test Auth Code

Program Requested

HeartLand-TBS-Grand(472)

☒ Units

1

☐ \$

From

10/02/2025

To

01/02/2026

Frequency

2 days/week

Units Total

28

\$ Total

Justification

Justification here

Reason for requesting more information

Modify

Clear

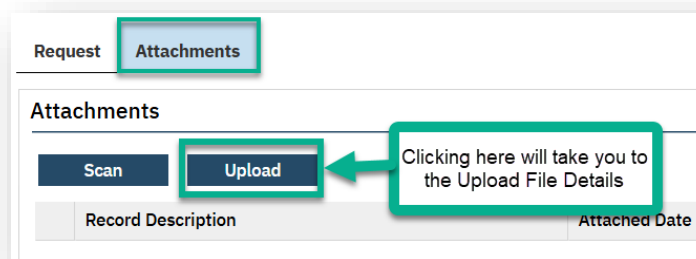
Auth List

	Auth Code	Program Requested	Units	From Date	To Date	Frequency	Total Units	Justificat
X	<input checked="" type="radio"/> Test Auth Code	HeartLand-TBS-Grand(472)	1	10/02/2025	01/02/2026	2 days/week	28	Justificati

Created By:Created Date/Time:Submitted Date/Time:

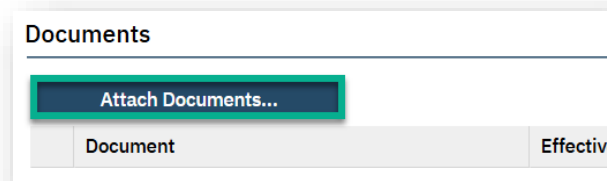
15. Hit **Save** on the top right of the screen. This will save the document in *Pending* status. You will then be able to upload and attach documents.

Next, the **Attachments Tab** allows you to scan/upload documents and attach documents from the Document (client) screen. *You are only able to use the attachment tab **prior to submitting** the request*



To scan/upload documents to attach to the service request, clicking on the **“Upload”** button will take you to the “Upload File Detail” screen which will be the same process as **Scanning (My Office)**. Please note that Scanning/Uploading documents from this tab will only pull the documents into this Service Request screen. If you need to scan/upload documents into the client’s chart, please use Scanning (My Office).

16. You can view the CalMHSA guide for scanning and uploading documents into SmartCare at this link: <https://2023.calmhsa.org/how-to-scan-a-document-into-the-clients-record/>



17. To attach documents the client already has on file in SmartCare, click on **“Attach Documents”**.

Attach/Review Documents (15) OK Cancel

Documents **Preview**

All Clinicians ▼ All Documents ▼ All Statuses ▼ Sort Document by Filters Apply Filter

Effective From 10/10/2024 ▼ Effective To ▼ ☐ Include Errored Documents All Programs ▼

Add All	Document/Description	Effective	Status	Author	Program
Add	CIWA	10/02/2025	Signed	Chhoeung, Sambo	SacCo-MHTC-Inpt-Stockton-04/23/2025
Add	Client Orders	10/02/2025	Signed	Chhoeung, Sambo	SacCo-MHTC-Inpt-Stockton-04/23/2025
Add	Nursing Assessment	10/02/2025	Signed	Chhoeung, Sambo	SacCo-MHTC-Inpt-Stockton-04/23/2025
Add	Client Orders	09/15/2025	Signed	Draper, Amanda	SacCo-MHTC-Inpt-Stockton-04/23/2025
Add	Client Orders	09/15/2025	Signed	Draper, Amanda	SacCo-MHTC-Inpt-Stockton-04/23/2025
Add	Client Orders	09/15/2025	Signed	Draper, Amanda	SacCo-MHTC-Inpt-Stockton-04/23/2025
Add	Progress Note (SAC_MHTC Client Non-Billable)	09/08/2025	Signed	Chhoeung, Sambo	SacCo-MHTC-Inpt-Stockton

List of Attached Documents

	Document/Description	Effective	Status	Author	Programs
<input checked="" type="checkbox"/>	Client Orders	10/02/2025	Signed	Chhoeung, Sa...	SacCo-MHTC-I...

18. The Attach/Review Documents box will pop up. Use the filters at the top to sort the documents if necessary.
19. Select the document you want to attach to the request by clicking on the **“Add”** button on the left-hand side of the document you want added. The document will then appear under the **“List of Attached Documents”**. You can add several documents to attach.

Attach/Review Documents (15)

Documents **Preview**

Client: Test, Lulu Effective Date: 04/16/2025 Author: Saldivar, Sarah Status: Signed

Once all documents are correct, click OK

OK Cancel

Client ID: 800440157 Page 1 of 1

Diagnosis Document

Client Information

Client Name:	Test, Lulu	Client ID:	800440157
DOB:	12/04/1998	Effective Date:	04/16/2025

Program: Turning Pt-Crisis Res II-M St.

Diagnosis

Borderline personality disorder

DSM5/ICD10	F60.3	SNOMED	20010003
ICD/ DSM Description	Borderline personality disorder		
Remission		Specifier	
Source	Amanda Draper, MFT	Severity	Moderate
		Type	Primary
		Order	1

20. You can preview the selected documents by clicking on the hyperlink for that document under Document/Description column. This will take you to the Preview tab.
21. Once all documents have been attached and reviewed, click **“OK”**. Go back to the request tab.
22. To review the request before submitting, click on the service request radio button in the Auth List, this will populate all the details previously entered. The request can still be edited at this time. Select the **Modify** button after making the updates. In the **Request Status** field, switch the status in the drop down to **“Submitted”**.

Service Request – Review/ Approval Detail

Request Attachments Contact Notes Approval History

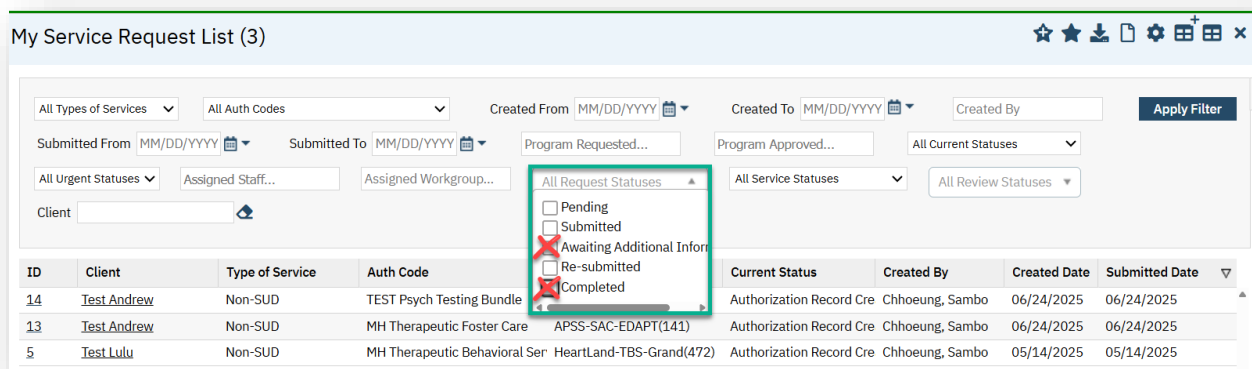
General

Type of Service	Non-SUD	Request Status	Submitted
Assigned Staff	Staff search	Assigned Workgroup	BHS SAC Service Auths
Urgent	<input type="radio"/> Yes <input checked="" type="radio"/> No		

23. Hit the **“Save”** button to electronically send the request to the BHS SAC team.

Please note, once you put a request in **“Submitted”** status and hit **“Save”**, no additional edits can be made. If additional documents need to be attached to the request, reach out directly to the BHS SAC team requesting to have the request placed in **“Awaiting Additional Information”** status.

You can check the request status in My Service Requests (List) by clicking on one of the hyperlinks from the **Service Request** widget. Once the list page opens, use the **“All Requested Statuses”** drop down to filter for statuses that are **“Awaiting Additional Information”** or **“Completed”**. You can narrow down your search by using the other filters on this list page if necessary. Click Apply Filters, this will bring up all requests based on the filters that you selected. You can then view the status of your service request authorizations whether it’s awaiting additional information or if it has been completed.



ID	Client	Type of Service	Auth Code	Current Status	Created By	Created Date	Submitted Date
14	Test Andrew	Non-SUD	TEST Psych Testing Bundle	Authorization Record Cre	Chhoeung, Sambo	06/24/2025	06/24/2025
13	Test Andrew	Non-SUD	MH Therapeutic Foster Care	APSS-SAC-EDAPT(141)	Authorization Record Cre	Chhoeung, Sambo	06/24/2025
5	Test Lulu	Non-SUD	MH Therapeutic Behavioral Ser	HeartLand-TBS-Grand(472)	Authorization Record Cre	Chhoeung, Sambo	05/14/2025

Re-submitting requests that are Awaiting Additional Information

24. From the *Service Request* widget, click on the **Awaiting Additional Information** [hyperlink](#).

25. The My Service Request list will open and display all items sent back by the approver that are Awaiting Additional Information.

26. Click on the **ID** hyperlink for the request

27. Under the **Auth List** section of the screen, click on the radio button to pull up the request.

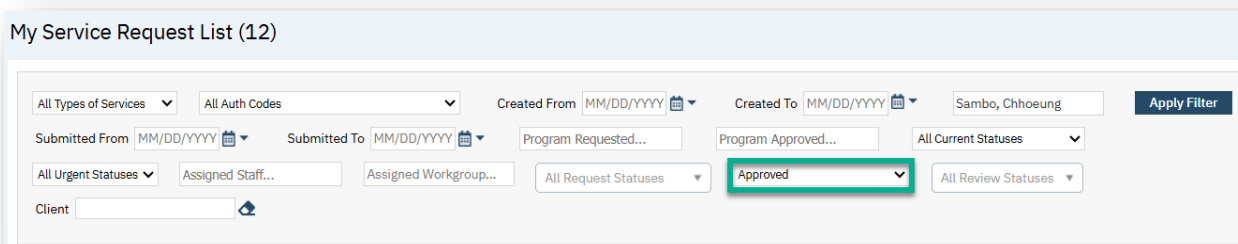
28. On the **Request** tab, all fields are grayed out except for the *Justification* box. You can check the reason the request got sent back in the *“Reasons for requesting more information”* box.

29. You can fill additional information in this *Justification* box for the approver to see. This is the only field on this tab you will be able to edit.

30. On the **Attachment** tab, if requested by the approver, you can attach additional documents.
31. Once everything is ready to be submitted, go back to the request tab and switch the **Request Status** at the top to **Re-submitted**.
32. Click on the **Modify** button.
33. Hit the **“Save”** button.
34. The BHS SAC team will be alerted that the request has been updated and resubmitted and is ready for their review.

Checking for Approved or Denied requests

35. On the My Service Request List (My Office) list page, select “Approved” or “Denied” from the drop down.



My Service Request List (12)

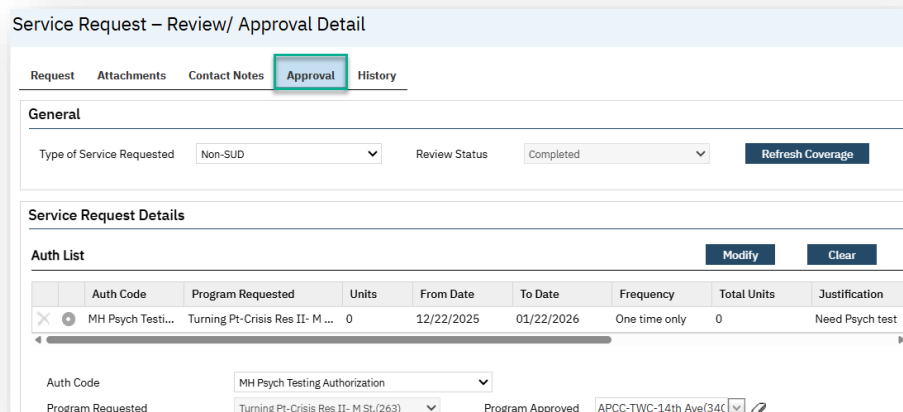
All Types of Services All Auth Codes Created From MM/DD/YYYY Created To MM/DD/YYYY Sambo, Chhoeung Apply Filter

Submitted From MM/DD/YYYY Submitted To MM/DD/YYYY Program Requested... Program Approved... All Current Statuses

All Urgent Statuses Assigned Staff... Assigned Workgroup... All Request Statuses **Approved** All Review Statuses

Client

36. Scroll to the right of the list page and you will see items in Approved or Denied services under *Service Status*.
37. Click into the numbered ID hyperlink of the request.
38. Click on the **Approval** tab. This tab will allow you to see the details of the approved or denied request.



Service Request – Review/ Approval Detail

Request Attachments Contact Notes **Approval** History

General

Type of Service Requested Non-SUD Review Status Completed Refresh Coverage

Service Request Details

Auth List Modify Clear

	Auth Code	Program Requested	Units	From Date	To Date	Frequency	Total Units	Justification
X	MH Psych Testi...	Turning Pt-Crisis Res II- M ...	0	12/22/2025	01/22/2026	One time only	0	Need Psych test

Auth Code MH Psych Testing Authorization

Program Requested Turning Pt-Crisis Res II- M St.(263) Program Approved APCC-TWC-14th Ave(34C)

39. Click on the **History** tab. You can also find the history of any updates made to the request. You will also find the status of approval or denial under Service Status column.

Service Request – Review/ Approval Detail

Request

Attachments

Contact Notes

Approval

History

Auth Code	Change Date/Time	User	Request Status	Assigned Staff/Workgroup	Program Requested	Program Approved	Service Status	Current Status	Review Status
MH Psych Testing Authorization	12/15/2025 08:42:30 AM	Chhoeung, Sambo	Completed	BHS SAC Service Auths	Turning Pt- Crisis Res II- M St. (263)	APCC-TWC- 14th Ave(34CNPZ)	Approved	Authorization Record Created	Completed
MH Psych Testing Authorization	12/15/2025 07:53:56 AM	Chhoeung, Sambo	Submitted	BHS SAC Service Auths	Turning Pt- Crisis Res II- M St. (263)				Initial
	12/15/2025 07:53:26 AM	Chhoeung, Sambo	Pending	BHS SAC Service Auths	Turning Pt- Crisis Res II- M St. (263)				Initial

Requesting a Re-authorization

1. When requesting a re-authorization, the steps will be the same as completing an initial authorization request. Re-authorization codes will have “*Re-Auth*” at the end (see example below). Select the applicable re-auth code from the drop down and follow **steps 7-15** to submit the request.

Service Request Details

Auth Code

MH Therapeutic Behavioral Services Re-Auth

Deleting a Service Authorization Request

2. Deleting a Service Authorization Request should only be done if the request was submitted in error. If the Service Authorization Request needs to be deleted, please work with the **BHS SAC** team directly.