

How to Submit a Service Authorization Request Tip Sheet

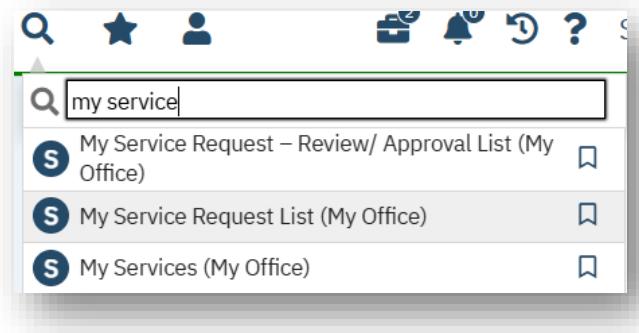
This Tip Sheet is for Providers of the EHR and will go through the process of submitting a service authorization request to BHS SAC. This Tip Sheet may change as our trainings and systems are updated. Please visit our website

<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.

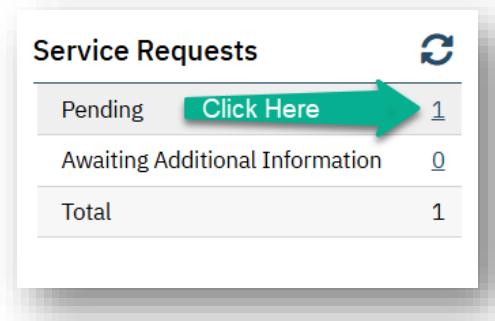
Follow the steps below for both initial authorization request and reauthorization request.

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**:



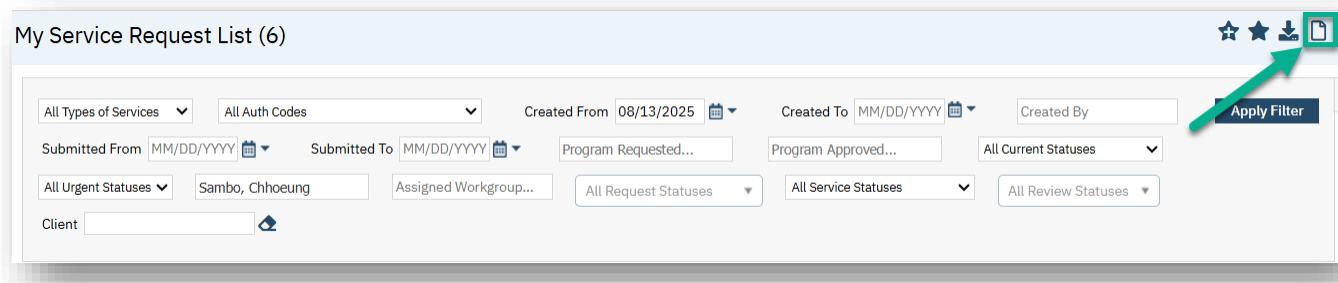
The widget will show items in the following statuses:

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*.

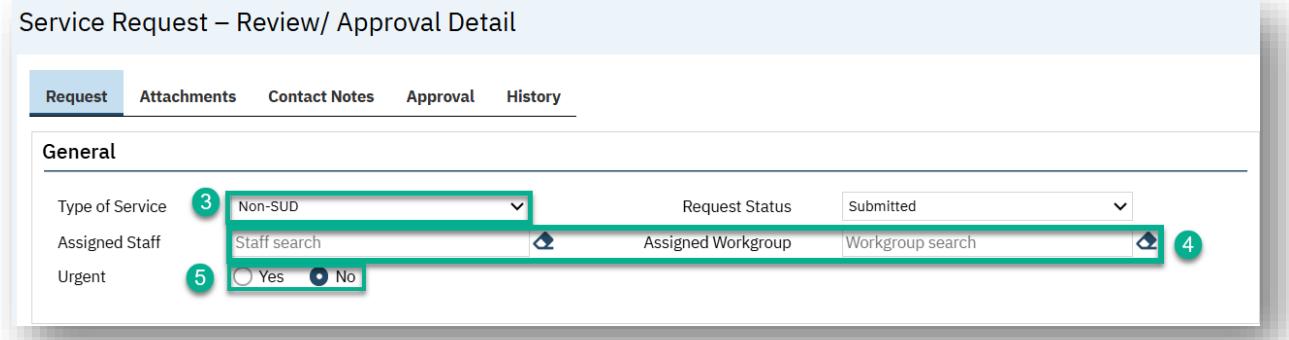
The Service Requests widget will need to be added to the dashboard. Follow CalMHSAs's guide to add widgets to the dashboard: <https://2023.calmhsa.org/how-to-add-a-widget-to-the-dashboard/>

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.



The screenshot shows the 'My Service Request List' page with a search bar and various filter options. A green arrow points to the 'Download' icon in the top right corner of the header.

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



The screenshot shows the 'Service Request - Review/ Approval Detail' page. The 'General' section is highlighted with a green box. Inside, the 'Type of Service' dropdown (3) is set to 'Non-SUD', the 'Assigned Workgroup' search field (4) is highlighted, and the 'Urgent' radio buttons (5) are shown.

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	<input type="text" value="Please select authorization code..."/>	7		
8	Program Requested	<input type="text"/>	9		
10	From	<input type="text"/> <input type="button" value="Calendar"/>	To <input type="text"/> <input type="button" value="Calendar"/>		
11	Frequency	<input type="text"/>			
12	Units Total	<input type="text" value="0"/>	\$ Total	<input type="text"/>	
Justification				<input type="button" value="Insert"/>	<input type="button" value="Clear"/>
Reason for requesting more information					

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

Auth List								
	Auth Code	Program Requested	Units	From Date	To Date	Frequency	Total Units	Justification
X	Test Auth Code	HeartLand-TBS-Grand(472)	1	10/02/2025	01/02/2026	2 days/week	28	Justification here

Created By: _____

Created Date/Time: _____

Submitted Date/Time: _____

Insert **Clear**

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

Auth List								
	Auth Code	Program Requested	Units	From Date	To Date	Frequency	Total Units	Justification
X	Test Auth Code	HeartLand-TBS-Grand(472)	1	10/02/2025	01/02/2026	2 days/week	28	Justification here

Created By: _____

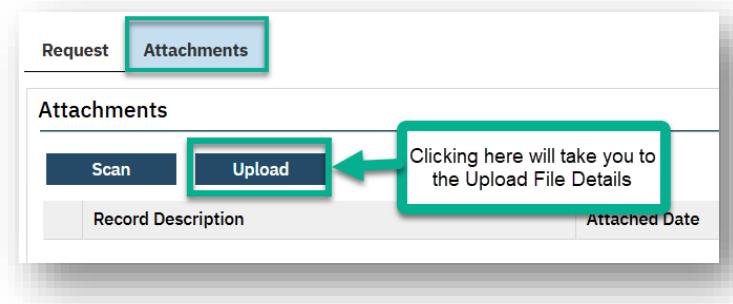
Created Date/Time: _____

Submitted Date/Time: _____

Modify **Clear**

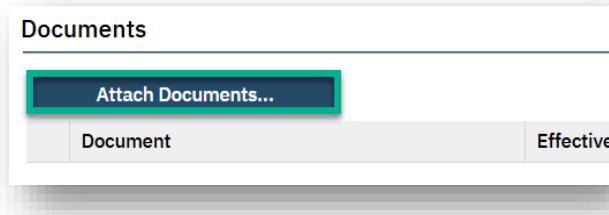
15. Hit **Save** on the top right of the screen. This will save the document in *Pending* status. You will then be able to upload and attach documents.

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

Attach/Review Documents (15)

OK Cancel

Documents Preview

All Clinicians All Documents All Statuses Effective From 10/10/2024 Effective To Include Errored Documents All Programs

Sort Document by Filters Apply Filter

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

List of Attached Documents

Document/Description	Effective	Status	Author	Programs
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**

Once all documents are correct, click OK

OK Cancel

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

PdfBytesHandler.axd 1 / 1 150% Page 1 of 1

Client ID: 800440157 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	Type			
Source	Amanda Draper, MFT	Severity	Moderate	Order	Primary

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

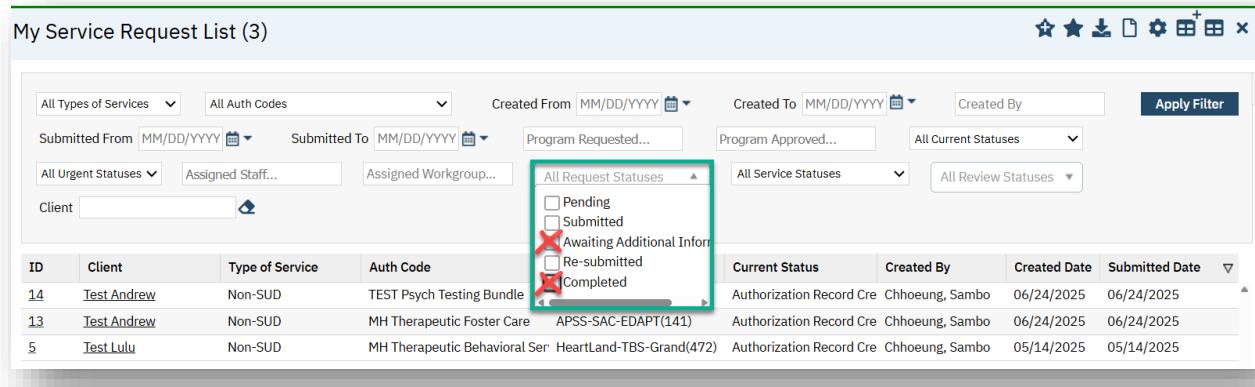
Type of Service	Non-SUD	Request Status	Submitted
Assigned Staff	Staff search	Assigned Workgroup	BHS SAC Service Auths
Urgent	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Save

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	Awaiting Additional Information	Chhoeung, Sambo	06/24/2025	06/24/2025
13	Test Andrew	Non-SUD	MH Therapeutic Foster Care	APSS-SAC-EDAPT(141)	Chhoeung, Sambo	06/24/2025	06/24/2025
5	Test Lulu	Non-SUD	MH Therapeutic Behavioral Ser	HeartLand-TBS-Grand(472)	Chhoeung, Sambo	05/14/2025	05/14/2025

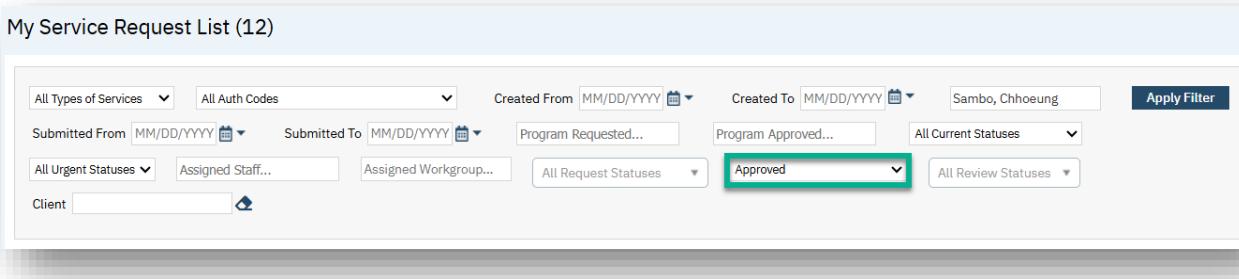
Re-submitting requests that are Awaiting Additional Information

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.

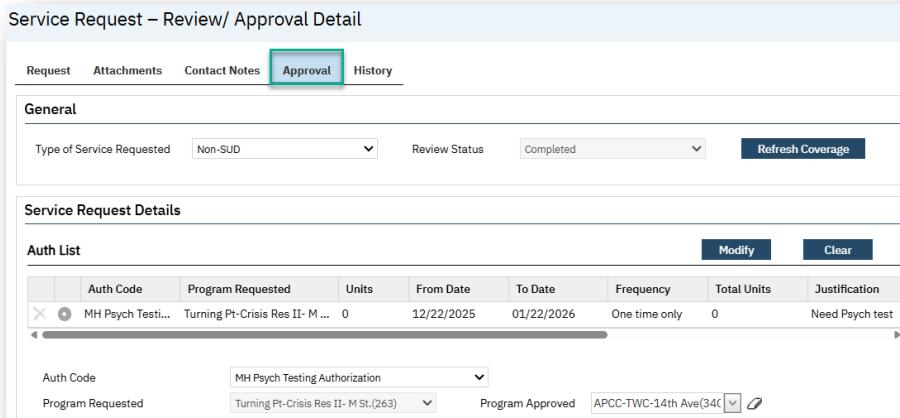
Checking for Approved or Denied requests

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



The screenshot shows a search interface for service requests. At the top, there are dropdown menus for 'All Types of Services', 'All Auth Codes', 'Created From' (MM/DD/YYYY), 'Created To' (MM/DD/YYYY), and a search field for 'Sambo, Chhoeung'. Below these are filters for 'Submitted From' and 'Submitted To' (both MM/DD/YYYY), 'Program Requested...', 'Program Approved...', 'All Current Statuses', 'All Urgent Statuses', 'Assigned Staff...', 'Assigned Workgroup...', 'All Request Statuses', and 'All Review Statuses'. A dropdown menu for 'Client' is also present. The 'Approved' option is highlighted with a green border. At the bottom right of the search bar is a 'Apply Filter' button.

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.



The screenshot shows the 'Service Request – Review/ Approval Detail' page. At the top, there are tabs for 'Request', 'Attachments', 'Contact Notes', 'Approval' (which is selected and highlighted with a green border), and 'History'. Below the tabs is a 'General' section with dropdown menus for 'Type of Service Requested' (Non-SUD) and 'Review Status' (Completed), and a 'Refresh Coverage' button. The next section is 'Service Request Details'. It contains a table titled 'Auth List' with columns: Auth Code, Program Requested, Units, From Date, To Date, Frequency, Total Units, and Justification. One row is visible: MH Psych Testi... Turning Pt-Crisis Res II- M ... 0 12/22/2025 01/22/2026 One time only 0 Need Psych test. Below the table are dropdown menus for 'Auth Code' (MH Psych Testing Authorization), 'Program Requested' (Turning Pt-Crisis Res II- M St.(263)), and '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

- 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

- 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.