How to Submit a Service Authorization Request Tip Sheet

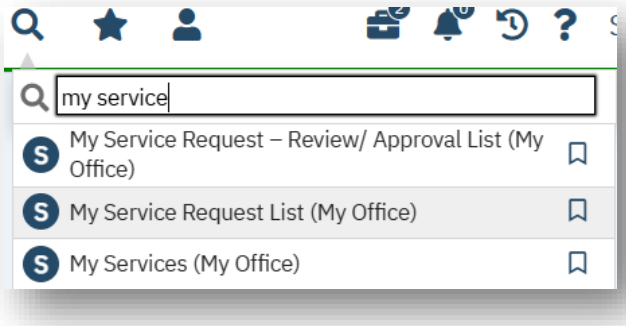
This Tip Sheet is for Providers of the EHR and will go through the process of submitting a service authorization request to BHS SAC. This Tip Sheet may change as our trainings and systems are updated. Please visit our website https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx for the most updated version. If any additional help is needed you can contact us at bhs-ehrsupport@saccounty.gov.

In addition to the Service Authorization Request, an Inquiry will also need to be created. For instructions on entering an Inquiry, refer to the Provider Inquiries Tip Sheet on our webpage.

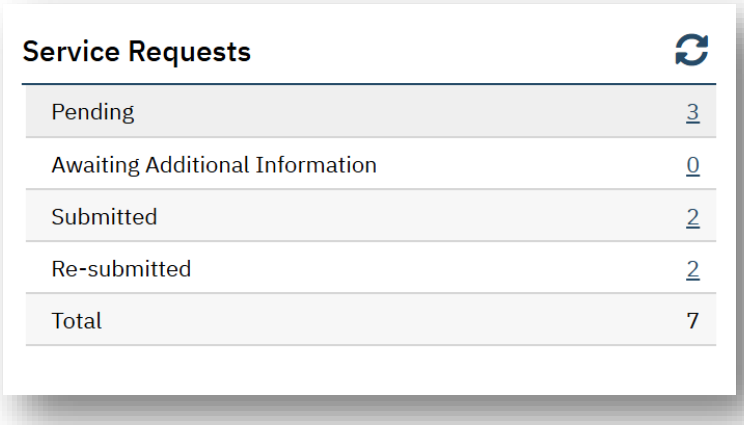
Follow the steps below for both initial authorization request and reauthorization request.

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**:

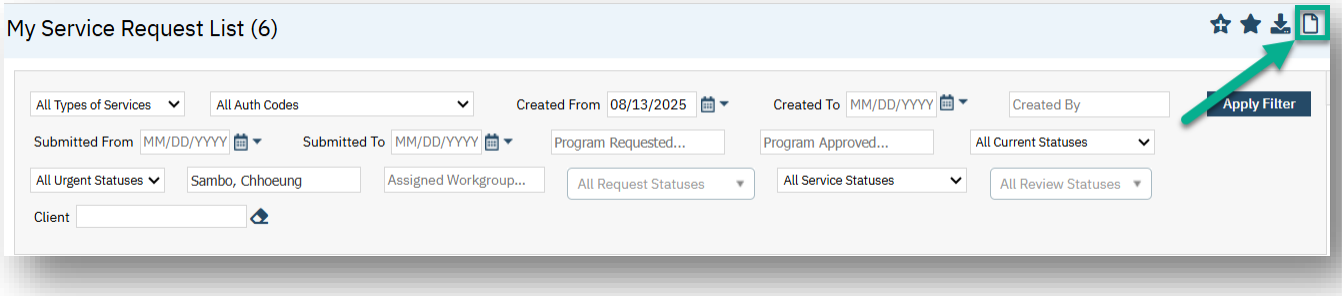


The widget will show items in the following statuses:

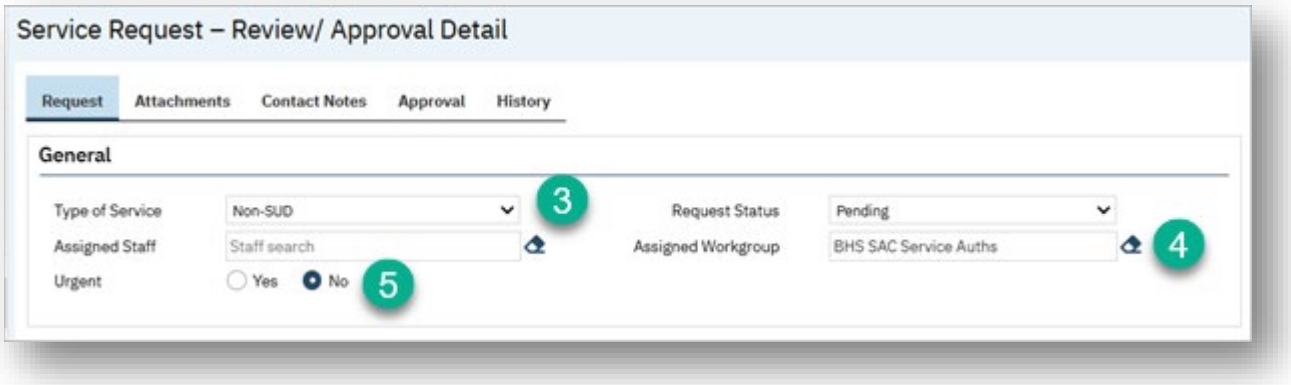
Pending – Requests that have been saved as *Pending* but has not been submitted.
Awaiting Additional Information – Requests sent back to the provider from the *Approver*.
Submitted – Requests that have been submitted.
Re-submitted – Requests that were previously *Awaiting Additional Information* and have been re-submitted.

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.

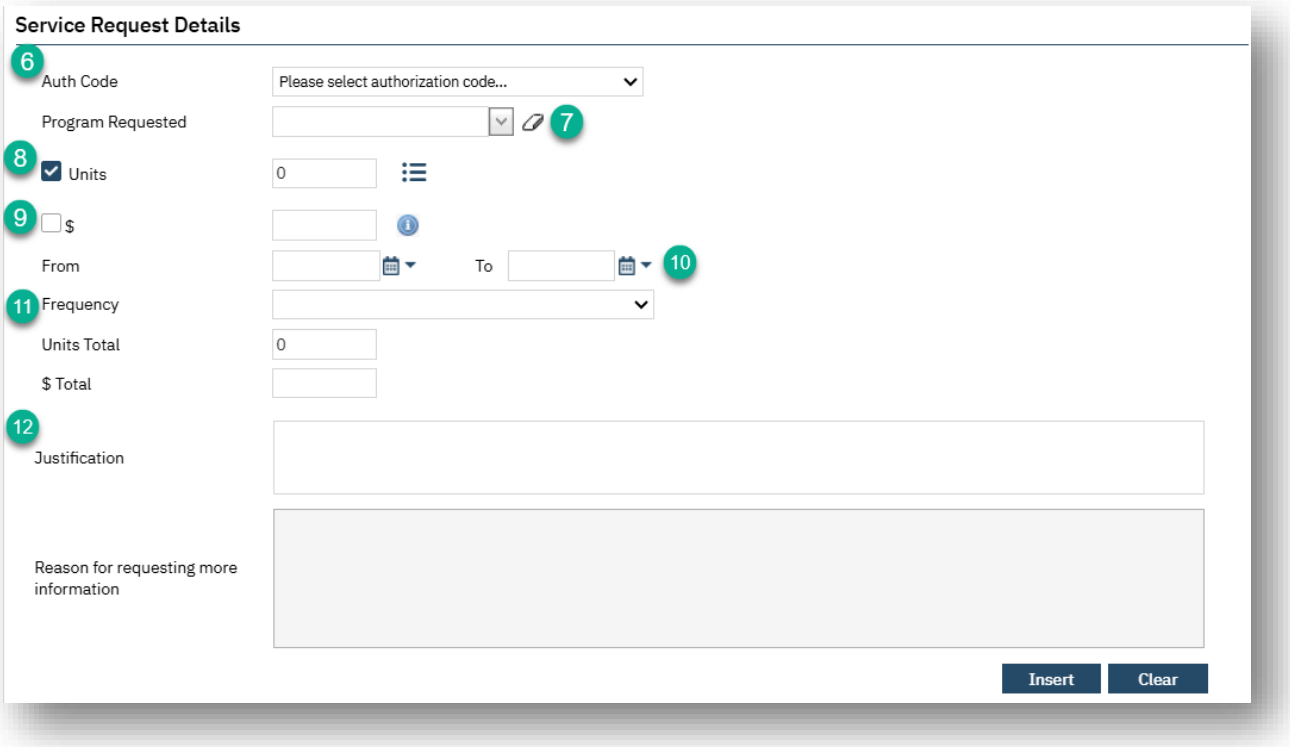


4. In the **Assigned Workgroup field,** search and select the workgroup. When requesting a service authorization from the BHS SAC team, select ***BHS SAC Service Auth*** workgroup.

   If requesting Therapeutic Foster Care services, select the TFC Workgroup.

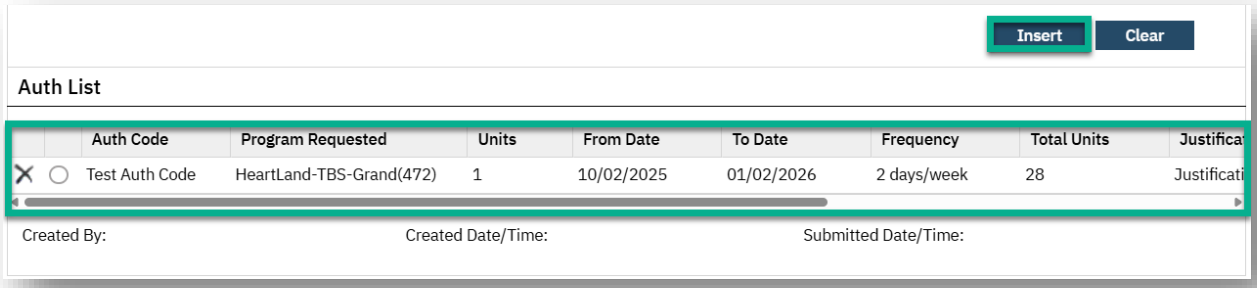
5. Select the appropriate Urgency. This field will default to "No" if unselected.

Fill out Service Request Details

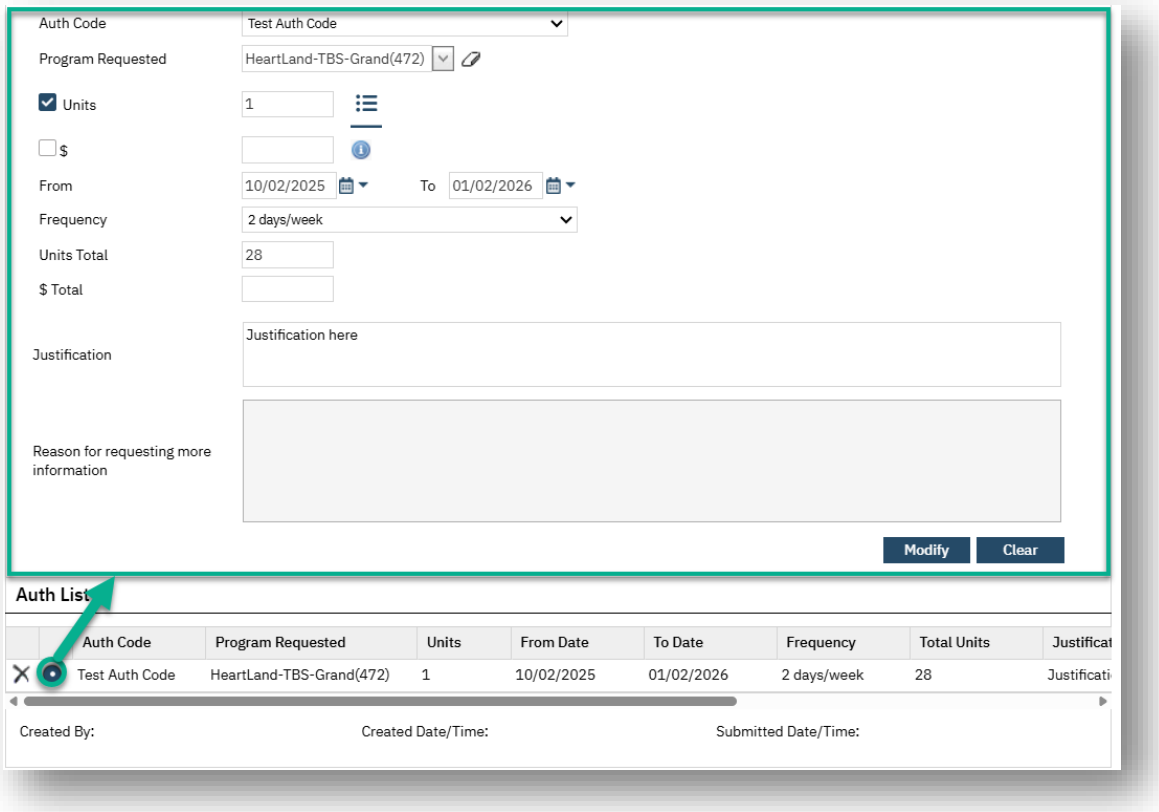


6. **Auth Code:** From the dropdown, select the appropriate Authorization Code for the services you are requesting.
7. **Program Requested:** Selecting the program that you request to provide the services. If you are unsure of which program to request, you can leave this box blank and then leave a comment 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**

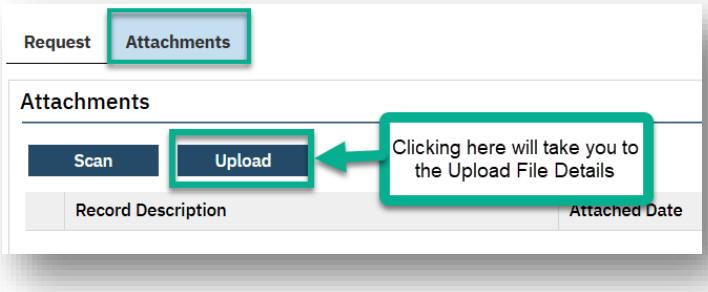


14. After clicking on Insert, the created request will then appear on the screen in the Auth List.



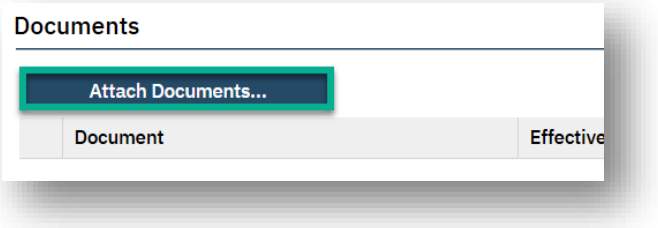
15. Hit **Save** on the top right of the screen. This will save the document in *Pending* status. You will then be able to upload and attach documents.

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*

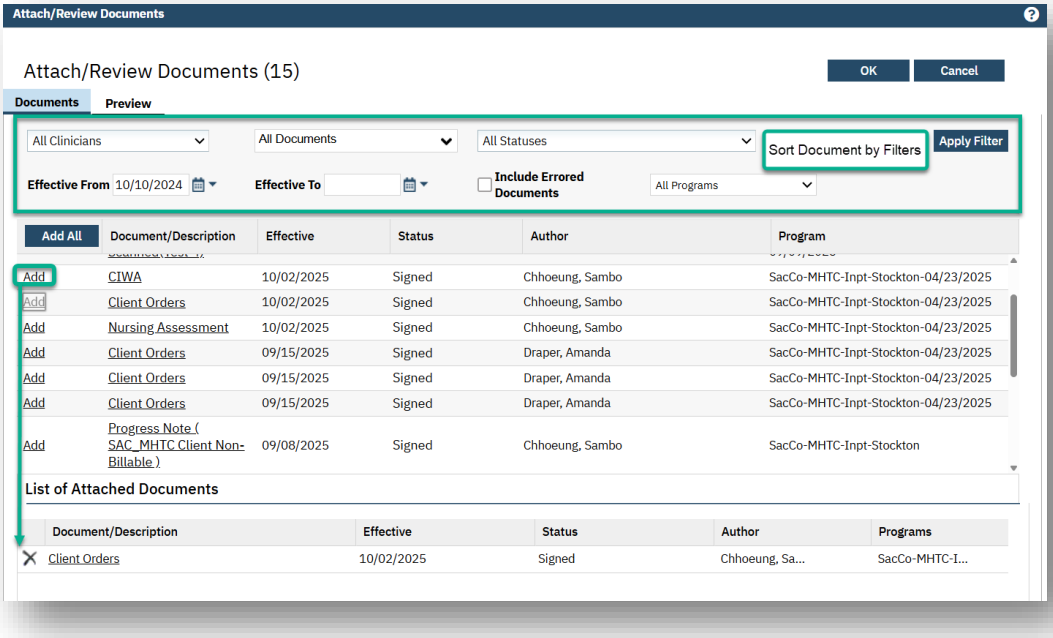


To scan/upload documents to attach to the service request, clicking on the **"Upload"** button will take you to the "Upload File Detail" screen which will be the same process as **Scanning (My Office**). Please note that Scanning/Uploading documents from this tab will only pull the documents into this 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/

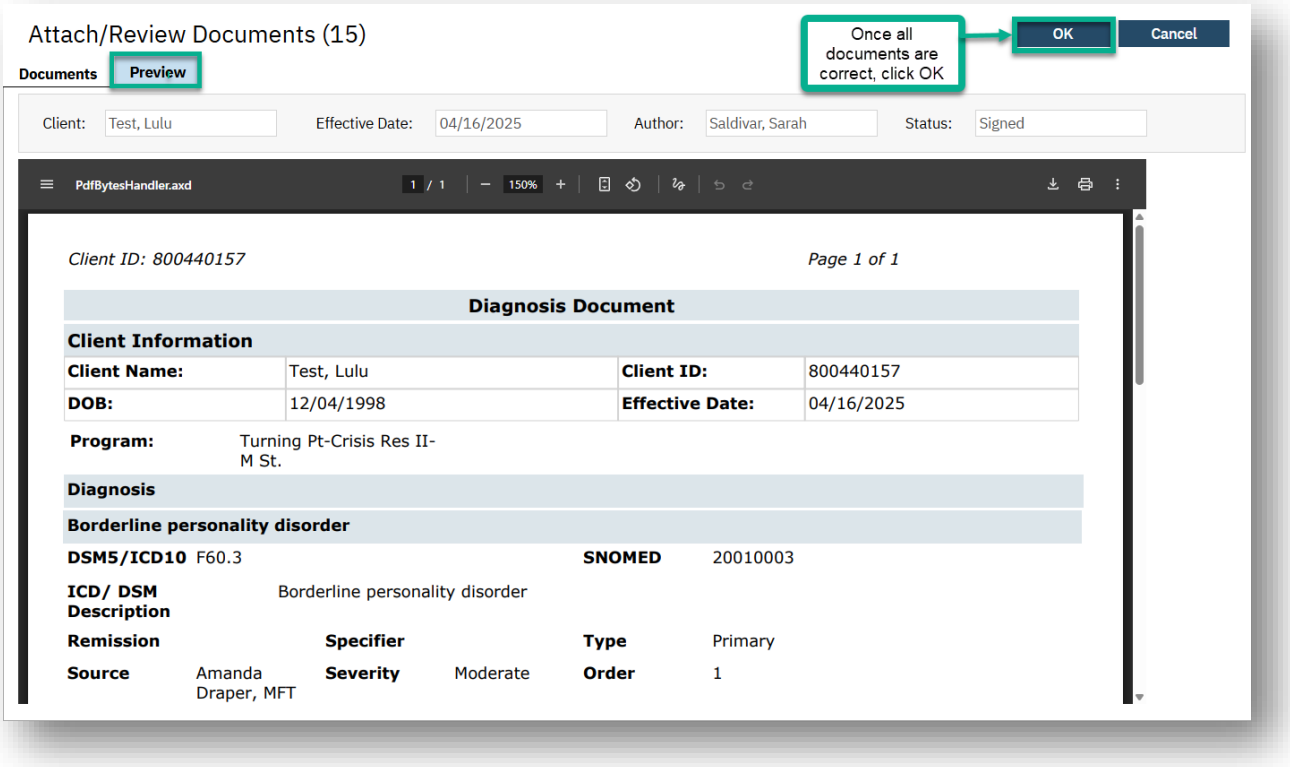


17. To attach documents the client already has on file in SmartCare, click on **"Attach Documents"**.

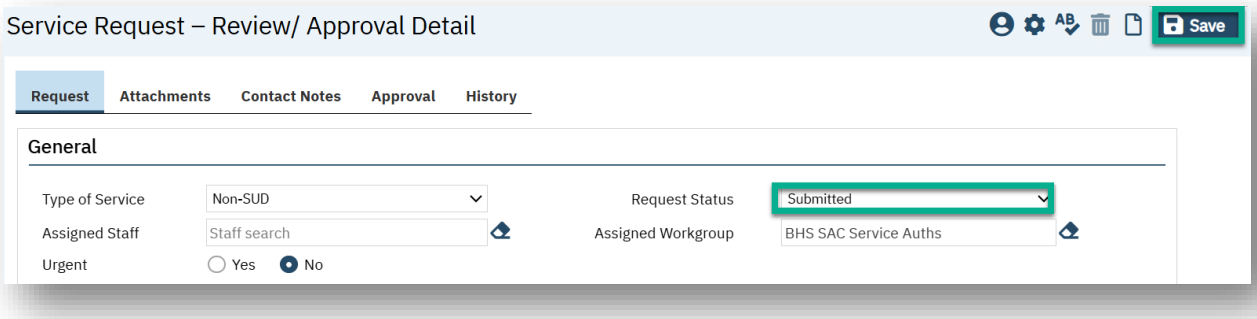


18. The Attach/Review Documents box will pop up. Use the filters at the top to sort the documents if necessary.
19. Select the document you want to attach to the request by clicking on the **"Add"** button on the left-hand side of the document you want added. The document will

then appear under the **"List of Attached Documents".** You can add several documents to attach.

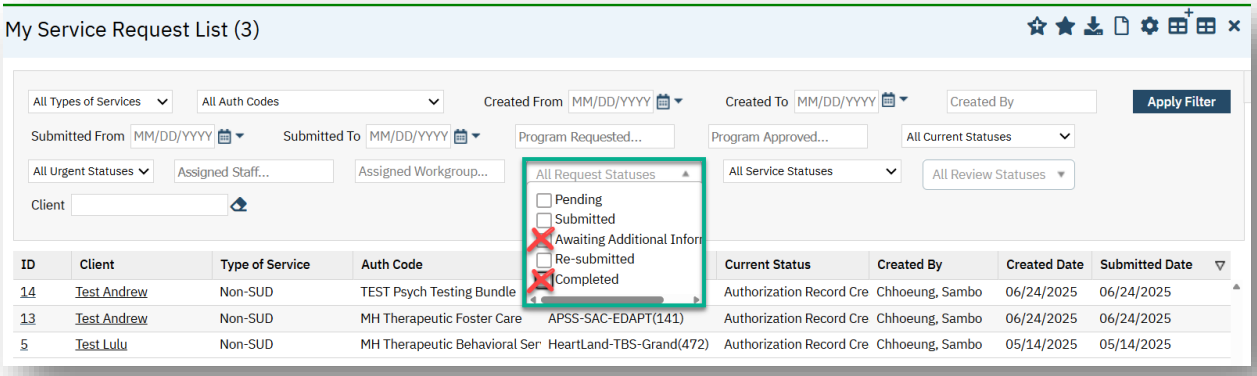


20. You can preview the selected documents by clicking on the hyperlink for that document under Document/Description column. This will take you to the Preview tab.
21. Once all documents have been attached and reviewed, click **"Ok".** Go back to the request tab.
22. To review the request before submitting, 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"**.



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.



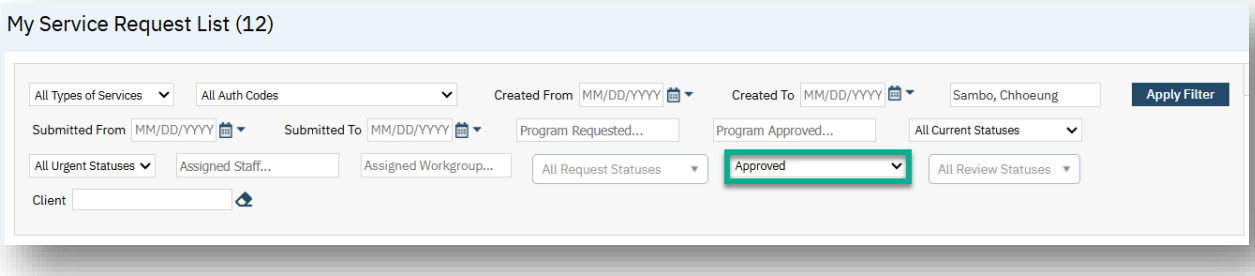
Re-submitting requests that are Awaiting Additional Information

24. From the *Service Request widget*, click on the **Awaiting Additional Information** hyperlink.

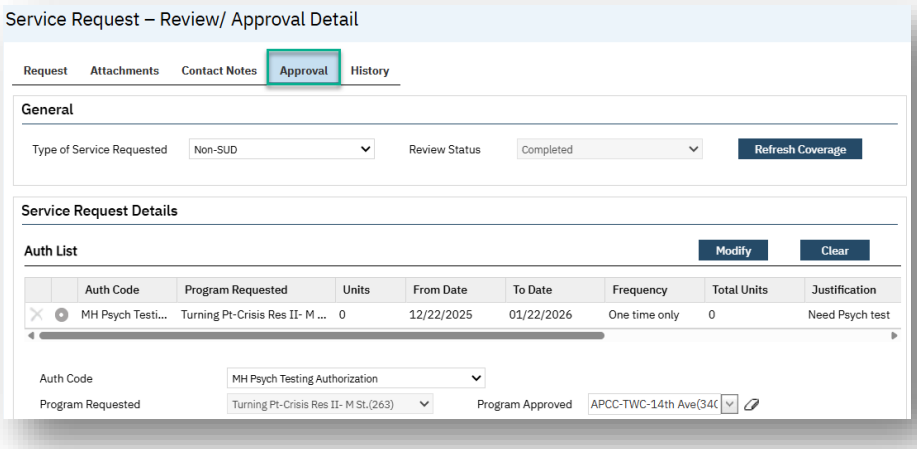
25. The My Service Request list will open and display all items sent back by the approver that are Awaiting Additional Information.
26. Click on the **ID** hyperlink for the request
27. Under the **Auth List** section of the screen, click on the radio button to pull up the request.
28. On the **Request** 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

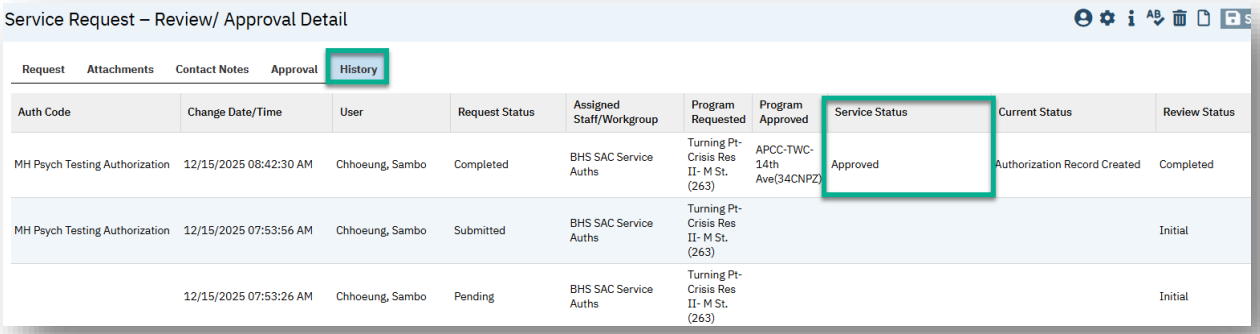
35. On the My Service Request List (My Office) list page, select "Approved" or "Denied" from the drop down.



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.

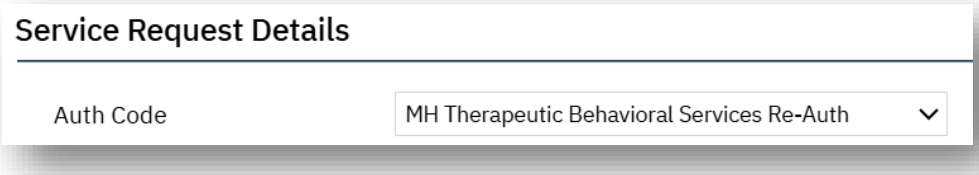


39. Click on the **History** tab. You can also find the history of any updates made to the request. You will also find the status of approval or denial under Service Status column.



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.



Deleting a Service Authorization Request

If a request was entered in error (example; entered for the wrong client), then it will need to be deleted and then re-entered correctly. Please contact the BHS SAC team at DHS-BHS-Service-Auth@saccounty.gov directly to request the deletion.