SmartCare Frequently Asked Questions (FAQ)

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This Document is to answer some Frequently Asked Questions that were received during our SmartCare Q and A sessions. Q and A sessions will continue to be held on Thursdays at 9:00 AM and 1:00 PM through the month of July.   You can also reach out to the EHR support team for any questions that may arise. We are available Monday through Friday 8:00 AM to 5:00 Pm and can be reached by email at BHS-EHRSupport@saccounty.gov and by phone at (916) 876-5806.

Please note: For any documentation questions please refer to Quality Management (QM) Standards. Their website is https://dhs.saccounty.gov/BHS/Pages/Provider-Training/GI-Documentation-Training.aspx or they can be reached via email at QMInformation@saccounty.gov

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Logging in and SmartCare access

Question: How will current Staff get access to SmartCare?

Answer: All current staff will have access to SmartCare come 7/1. The link to SmartCare will be emailed to our distribution list on 7/1 and posted on our website, along with a tip sheet that will show you step by step how to log in for the first time.   You can find our website here https://dhs.saccounty.gov/BHS/BHS-EHR Staff will use their Avatar username and email address on file to reset their password. If your email address was not up-to-date in Avatar you will need to call the help desk for assistance logging in. Our phone number is (916) 876-5806.

Question: How will we register new staff for SmartCare?

Answer: Authorized Approvers will fill out and sign the new EHR Training Request form requesting access to the training videos and any additional lie trainings as necessary for program/role. For clinical staff, the authorized approver will send this form with their staff credentialling paperwork to QM at DHSQMStaffReg@saccounty.gov . Once QM has received the paperwork, they will send us the training registration form and we will process it and send the staff member the training materials. For Admin/Billing staff, the training form can be emailed directly to BHS-EHRtrainingreg@saccounty.gov . Once the staff has watched the necessary videos and passed the associated quizzes, they will need to reply to the email from the training registration desk to inform us. Once we verify their quiz results and their account is created, we will send them their credentials. The process for new staff account creation will take longer than the current process, we estimate about 5 business days for accounts to be created.

Black Out Period

Question: What is the blackout period and what do I need to do in SmartCare for it?

Answer: The blackout period is from 6/26 at 5 pm to 7/1 at 8 AM when SmartCare goes live. You will need to re-enter any new admits that occurred within this period into SmartCare by using the Program Assignment screen to enroll the client into your program once it goes live on 7/1. If the client is brand-new and not previously in Avatar until the blackout period, their ID and demographic information will not transfer into SmartCare until 7/2 at the earliest. Once the client's name and ID number has been imported, you will still need to go in and fill out any additional demographics, insurance information and enroll them into your program using the Program Assignment screen. Please back date the admission to the date they were admitted for accuracy. You will not be re-entering any service notes or services from the blackout period into SmartCare, those will only be entered into Avatar. All billing for services prior to 7/1 will need to be done in Avatar. Any Services incurred on or after 7/1 will be processed in SmartCare.

General Questions

Question: For users who have both Mental Health and SUPT CDAGS, will we be able to switch between the two without logging out?

Answer: No, unfortunately you will need to log out and log back in to change your CDAG.

Question: Are the required fields in SmartCare marked with an asterisk?

Answer: Not always, however if you try to save or sign the document with missing information, you will receive an error telling you what information is missing.

Question: What is the difference between Broad Search and Narrow Search?

Answer: Narrow Search only looks for exactly what you type. Broad search is a phonetic search so it will search for anything that sounds like what you typed. It can find the client even if you only have a partial name or the spelling is wrong.

Question: What is the Difference between the ASAM and the CalAIMS assessment?

Answer: The ASAM is for SUPT providers and the CalAIMS is for Mental Health services.

Question: Will clients have the same Avatar numbers?

Answer: Yes, Avatar numbers are transferring over, and new IDs will follow the same format.

Reports

Question: What Reports will be available in SmartCare? Will there be a Report inventory?

Answer: None of the Reports that we had in Avatar will be in SmartCare at go-live. All of the Reports that are in the system are created by Cal-MHSA. There is no current Report Inventory, however, searching for "Report" will pull up all the available reports in the search bar.

Question: How do I find the Diagnosis and Movement History?

Answer: You can find the diagnosis by searching "diagnosis" in the SmartCare search bar. Select Diagnosis Document (Client). If you do not already have a client selected it will have you search for your client. If the client does not have any diagnosis, it will make you select a program and take you to the input screen to add one. If they already have diagnoses on file in SmartCare, it will pull up the pdfs of the diagnosis that you can scroll through using the arrows at the top. Any current primary diagnosis from Avatar will be available in the Diagnosis Document screen in SmartCare. To view historical or additional diagnoses entered in Avatar please see the face sheet in the scanned documents. To see the movement history search for Client Programs (Client). At the top make sure the status filter is set to All Statuses. This will show you all the programs a client has been Enrolled, Discharged and Requested to, as well as the dates for enrollments and discharges.

Question: What will replace Avatar report "Client Services Report"?

Answer: The reports won't be exact, but you can go to the Services (Client) list page to view services for a specific client or Services (My Office) to view on a program level. You can also export list pages to excel.

Service Requests and Inquiries

Question: How will staff send and receive service requests?

Answer: The inquiries are replacing the Service Requests. You can view our Inquiry Tip Sheet on our website for more information about this process. https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx

Question: Do I always have to do an inquiry before admitting a client into my program?

Answer: Yes, unless the client comes referred to you from Access, SOC or some other referral agency where an inquiry has already been created, in which case you would just change their status in your program from requested to enrolled, and proceed with your intake process

Staff Calendar

Question: Is using the calendar in SmartCare required? How can we create notes/services without using the Calander in SmartCare?

Answer: No, the calendar is not required. To create a service or note for the client without using the calendar, search for the client in the client search bar. If you hover over their name, you can then use the client sub-menu to select Create Services/Notes. Otherwise, select the client and search Services/Notes (client) and use the "new" button in the upper right-hand corner (Shaped like a piece of paper) to create a new service and or note.

Client Demographics

Question: Can we enter the clients preferred gender, or does it have to match their sex at birth?

Answer: The client's sex must match Medi-Cal, however on the demographics tab on both the client Information Screen and on the Inquiries screen there is an option to enter Gender Identity and Pronouns.

Aliases

Question: If a client has a chosen name, would we be able to search that name in SmartCare? Or does it have to be their government name (or dead name)?

Answer: Their name must match their Medi-Cal, but there is a section on the client information screen called Aliases, where you can add any preferred names or nicknames. You can also check a box on that screen to make the name searchable so you can search for the client by their preferred name.

Question: For those of us with our own EHR, there is a field in Avatar, where we can enter our own client ID for them. Will this be available in SmartCare or will they just have their SmartCare ID (comparable to their current Avatar ID)?

Answer: Yes, you can also enter the alternate ID number in the Alias tab on the Client Information screen. You can also check a box on that screen to make the alternate ID searchable.

Entering Diagnosis on behalf of a practitioner

Question: Can non-clinical staff enter a diagnosis on behalf of a practitioner?

> Answer: Yes, but they need to make sure they enter the practitioner's first and last name and the practitioner's classification in the Source field. Aka John Doe, LCSW.

Corrections

Question: What is the corrections process, do I still need to do OCDR's?

> Answer: More to come on the corrections process.

Notes

Question: How can staff send a note for co-signature?

> Answer: Progress Notes do not require Co-Signatures in SmartCare but we have developed a work around for those who still need it. Please check out the tip-sheet we have for this process called the Co-Sign Tipsheet. The Tipsheet can be found on our EHR Website. https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx

Question: Will our note templates be transferred over to SmartCare?

> Answer: No, there will not be any note templates in SmartCare, we recommend copying and pasting any Note templates you want to keep into a word document so you can copy and paste them into SmartCare later for use.