

Course Content



- Understand the life cycle of a client
- Inquiry and enrollment process
- State reporting
- Setting up coverage
- Supplemental data
- Entering services
- Correcting services

What Should I Expect From Training Today?

We will be going over SmartCare functionality

- Searching for clients and screens

- How to save and enter data

- How to use the filters to access specific data in reports and list pages

- How to navigate SmartCare

The content in training today will be shown at a high level to cover everyone's role. Each agency operates differently, your specific agency will be able to specify what screens you will be using.

You will be able to access every screen, list page, and report that we demo today after passing the quiz at the end of training.

- CalMHSA is an independent administrative and fiscal public entity representing California counties
- CalMHSA's role is to work with California counties to transform Mental Health for Californians
- CalMHSA manages the semi-statewide EHR SmartCare
- CalMHSA works as the middle-man between the counties and the vendors of the EHR, Streamline

Who is
CalMHSA?

When to Contact CalMHSA Vs. Sacramento County

- CalMHSA provides basic navigation training through the LMS Training Portal
 - This is the recorded trainings that were sent to you prior to today's training
 - If any support is needed on the LMS system (unable to login, video not working, etc.) you will need to contact CalMHSA.
 - [\(833\) 686-6801](tel:8336866801)
 - EHR@calmhsa.org
- Sacramento County EHR Team offers support on SmartCare (unable to login, navigation, error messages)
- If our team is unable to fix a problem, we will reach out to CalMHSA directly

- Prior to training you should have taken the LMS training courses on CalMHSA's webpage.
- These trainings and quizzes will need to be completed prior to gaining access to SmartCare or updating your current account.
- Since the LMS trainings cover some of the material we will be talking about today, we will not be demoing every screen in today's training.
 - Written documentation is also available for each of the modules. We will share the path to find those instructions on each information slide.
- There are a few modules shown in the LMS videos that Sacramento County does not complete, we will call those items out.
- The LMS videos can be accessed at any time, they can be re-watched as often as needed

LMS Trainings

Proper Use of SmartCare

1

You must have permission from program to use SmartCare when you are away from your agency

2

Do not access over unsecure Wi-Fi or in a public area

3

Always protect client information

- Health Insurance Portability and Accountability Act (HIPAA)

Username and Passwords

Provides access into SmartCare

Contains user's specific classification and permission levels for access to screens, list pages, and reports

Do not let anyone work under your username

Do not share your password with anyone, including the EHR Team

Forgotten Username or Password

If you have forgotten your password, click on the “Forgot Password” link. If you continue to have trouble logging in call our support line to reset your password. Password resets must be done over the phone

If you have forgotten your username, your authorized approver will need to send an email to training registration requesting your username

SmartCare is an internet browser-based application

- It can be used on the following internet browsers
 - Microsoft Edge
 - Google Chrome
- SmartCare is NOT compatible on the following internet browsers
 - Internet Explorer
 - Firefox
 - Safari

Accessing
SmartCare

SmartCare Webpage

<https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx>

- Behavioral Health Services (BHS) - Electronic Health Record (EHR) Team Contact Information
- Meeting Information
 - Mental Health and Substance Use Prevention and Treatment (SUPT) User Forum schedule and minutes
- SmartCare
 - Launch SmartCare
 - California Mental Health Services Authority (CalMHSA) Training Resources
 - CalMHSA documentation paths will be on the bottom of each slide, you can view the documentation resources in this section of the webpage
 - Sacramento County Training Resources
 - Tip sheet paths will be on the bottom of each slide, you can view the tip sheets in this section of the webpage
- Quality Management Resources

Part 1 - Creating & Setting-up a Client

- Inquiry
- Creating a Client ID
- Enrolling a Client into a Program
- Treatment Teams
- Client Flags
- Special Population tracking
- Client Information
- Scanning

- Inquiry screen allows staff to document requests from a client including a request for services
- If the person is only requesting information, you can log the interaction without the need to create a client ID in SmartCare
 - The requested information will be stored in SmartCare for future reference
- Only clinical staff should determine the disposition of an inquiry
 - Admin staff can enter the disposition on behalf of clinical staff
- See “Provider Inquiries Tip Sheet” on our webpage for tips on how to complete an inquiry
 - <https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx>

Inquiry Information

Demo

Inquiry process

Disposition an
Inquiry

- Once you've saved an Inquiry, a new client ID can be created by selecting the button to “Link/Create Client”
 - When linking the new client, the name, SSN, and DOB will pull forward to the screen. You'll need to click on the following search buttons to enable the “New Client” button
 - Broad Search
 - SSN
 - DOB
- The client must have a client ID created prior to enrolling

Creating a Client ID

Enrolling a Client into a Program

- Once the new client has been created you can enroll them into a program
- Search “Client Programs (Client)” to enroll the client into a program
- This list page will also show any previous enrollments the client has had at your program
 - For mental health programs, you will be able to see any enrollments from other mental health providers as well
 - SUPT providers will only see enrollments from their program
 - Enrollments on this page are after July 1st, 2023. If there were enrollments prior to July 1st 2023, there will be a program named “Document Only Program”
 - You can see a list of those prior programs by going into “Documents (Client)” and viewing the “Avatar Face Sheet” This will be at the bottom of the list

Program Assignment (Program)

- If the client reaches out to the Sacramento County BHS-SAC Team, they will complete the inquiry and request enrollment into your program
- You can view any enrollment requests in the Program Assignment (Program) screen
 - Use your filters to select your agency and “Requested” status, this will show any pending requests
- When a request comes in you will go into that record and switch the status to “Enrolled” and add the enrollment date

Demo

Client Program (Client)

- Program Assignment Details
- Enrollment Process



Program Assignment (Program)

- View client enrolled and or requested into your program

- This screen is used to track staff assigned to a client's care
- Adding a client to a staff's Treatment Team will add the client to their caseload and will show the client on the staff's client drop-down list, without having to search for them
- The Treatment Team list page can be used to see the client's treatment team from other Mental Health(MH) programs
 - SUPT providers can only view the treatment team for client's enrolled in their own program
- Discharging a client from a program won't automatically deactivate all treatment team members associated with that program. If the client has been discharged from your program but is still showing up on your caseload, go into the Treatment Team screen and see if you're still listed as active
- If you are still listed as active on the Treatment Team list page, follow the steps to add an end date and deactivate yourself from the treatment team by following the steps in the link below:
 - <https://2023.calmhsa.org/how-to-view-whos-on-the-clients-treatment-team/>



Treatment Team (Client)

How to Remove Someone from Treatment Team



The box below shows an active Treatment Team Member.

Treatment Team Member

Contact External Staff Active

Start Date: 02/15/2024  End Date: 



Staff:

Role:  Program: 


The box below shows an inactive Treatment Team Member. Notice there is an End Date, and the Active box is not checked. Do not delete an entry. End date and remove the check on Active.

Treatment Team Member

Contact External Staff Active

Start Date: 02/15/2024  End Date: 02/17/2024 

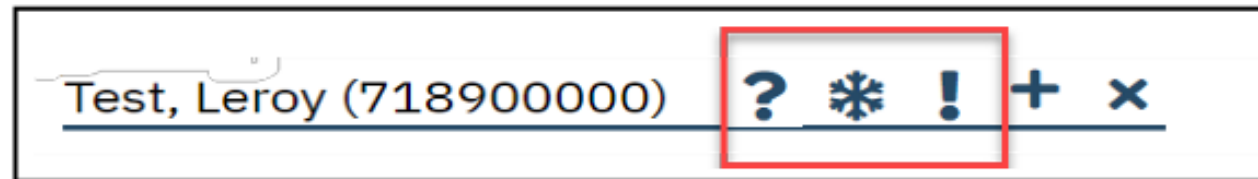
Staff:

Role:  Program: 

Client Flags (Client)

- Client Flags alert users with critical beneficiary support information. An icon which corresponds to the Client Flag will show up in the client header
 - For more detailed instructions on how to enroll a client flag refer to the Client Flag Tip Sheet located on our webpage:
 - <https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx>

Once a client has been enrolled in a Client Flag, the icon(s) will be visible in the client's header.



Special Population Tracking

➤ When should you use the Special Population form?

- All clients will need to have their housing status entered in this form
- Clients apart of the following populations will also need to be added
 - Foster Care, Katie A, CalWORKS, CPS, ICC, IHBS, Conservatorship, Presumptive Transfer, Probation, TFC

➤ Why is it important to have accurate Start and End Dates?

- Accurate start and end dates are essential for coordinated care. It is best practice service delivery for these populations of consumers who are involved in multiple systems

➤ To see a demonstration of the Special Population Tracking screens, click on link below:

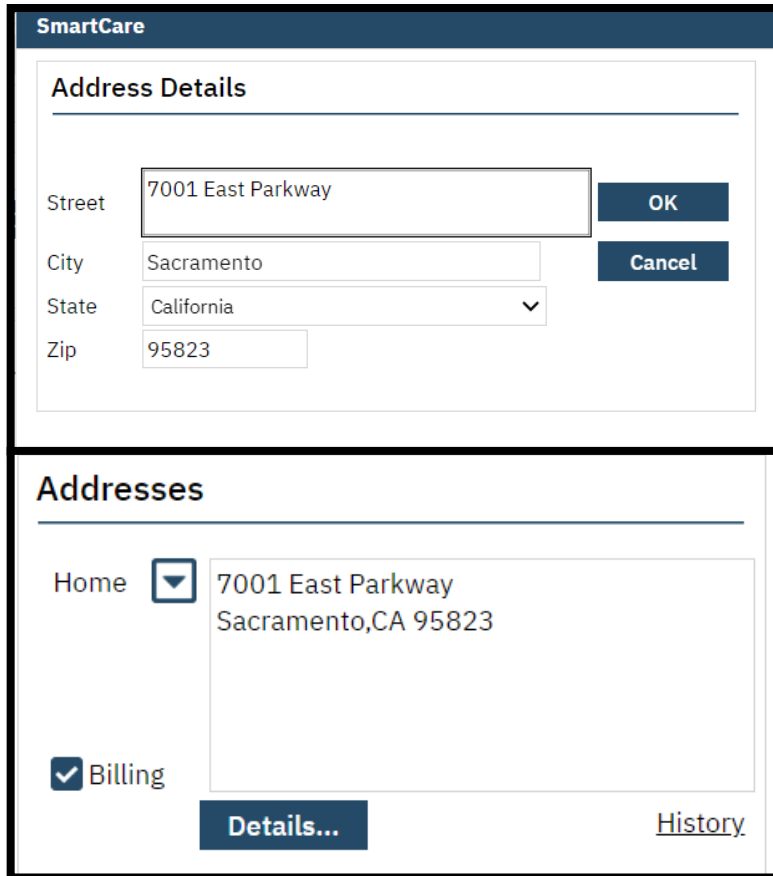
- [How To Identify a Client as Katie-A or Other Special Population - 2023 CalMHSA](#)
- The demonstration can also be found on the LMS videos

Client Information (Client)

- If any demographic information needs to be added or changed after creating the inquiry, you can do that here
 - This includes the client's name, DOB, SSN, or address
 - Additional demographic information can be added such as the client's gender identity, pronouns, race, etc.
- You're able to add contacts or aliases for the client if needed
 - Contacts added in this form will pull forward to other forms
- Verify the client address is entered properly
 - The address should be broken out by each line, not all entered on one line
 - The billing box next to the address needs to be checked
 - If the client is homeless, enter "HOMELESS" on the address line and your agencies city, state, and zip code on the lines below

Correct Address vs. Incorrect Address

Correct Address



SmartCare

Address Details

Street: 7001 East Parkway

City: Sacramento

State: California

Zip: 95823

Addresses

Home 7001 East Parkway
Sacramento, CA 95823

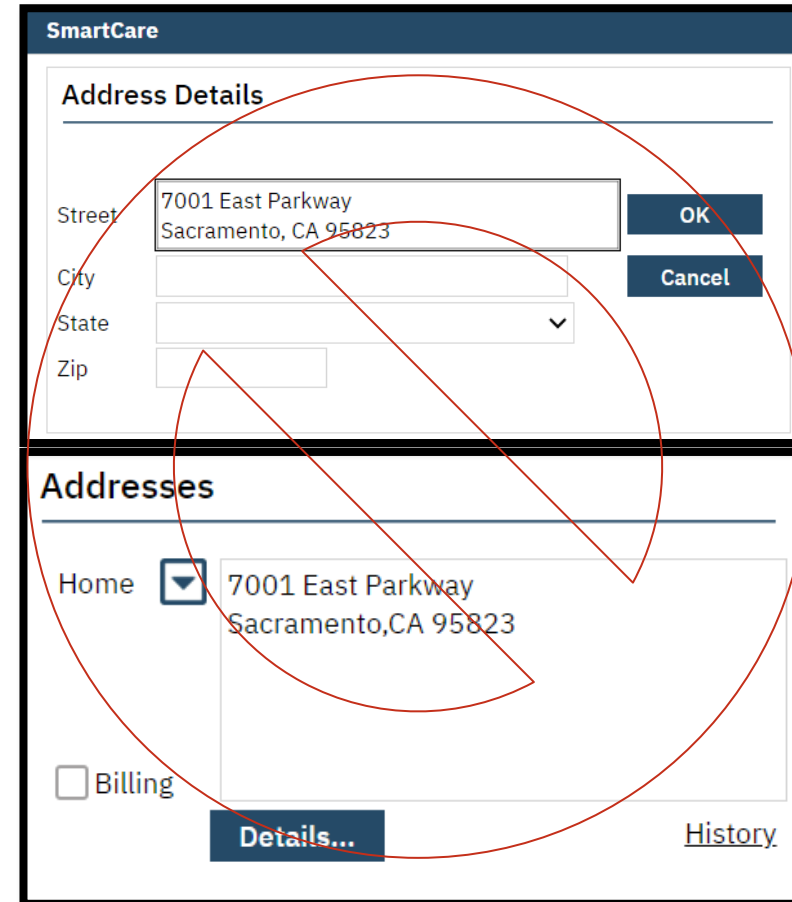
Billing

[History](#)

A correct address will break out each section individually, not putting the full address on one line.

A correct address will have the billing box checked.

Incorrect Address



SmartCare

Address Details

Street: 7001 East Parkway
Sacramento, CA 95823

City:

State:

Zip:

Addresses

Home 7001 East Parkway
Sacramento, CA 95823

Billing

[History](#)

Entering an address incorrectly will cause services to not claim out and prescribers unable to prescribe medication. It's important the address is entered in the correct format.

Demo- Client Information (Client)

Update
Demographics

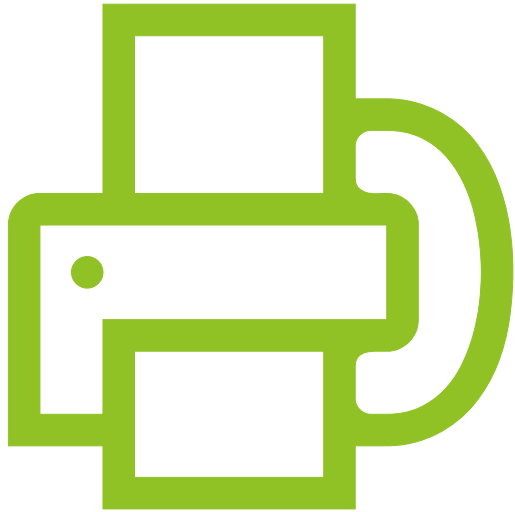
Add a Client
Contact

Scanning (My Office)



- Used to scan or upload documents into a client's record
 - You'll use the upload option, unless you have a hard scanner attached to your computer
 - If you are using the scanning option with a hard scanner, there may be installation requirements
 - Corrections can be made to documents you scanned in, from this screen. You will not be able to access documents that have been scanned in by others at your agency
- There is an option to single scan or batch scan
 - Single scan is used for scanning an individual record
 - Batch scan allows you to scan multiple documents for either multiple client's or the same client
- See QM's "Sacramento County Scanned Document Naming Convention Form" to view the naming convention and folder selection for scanned documents
 - [Documentation Standards \(saccounty.gov\)](http://saccounty.gov)

Demo- Scanning (My Office)



- Used to view scanned documents
- Used to scan a single document
- How to batch scan, used when scanning multiple documents
- How to delete a scanned document
- How to view documents in “Documents (Client)”

Part 2 - State Reporting

Mental Health Providers

- CSI Overview
- CSI Standalone Collection (Client)
- MH Non-Psychiatric SMHS Timeliness Record (Client)
- MH Psychiatric SMHS Timeliness Record (Client)

SUPT Providers

- CalOMS Overview
- CalOMS Admission (Client)
- CalOMS Standalone Update/Discharge (Client)
- DMC Outpatient Timeliness Record (Client)
- DMC Opioid Timeliness Record (Client)

- Only used by MH providers
- Collected as a state mandated reporting requirement for mental health service providers
- There are different screens that capture CSI in SmartCare
- Be sure to watch the CalMHSA training video posted in the Billing Documentation section of CalMHSA's webpage to learn more about CSI Information in SmartCare
 - To see a demonstration of the CSI screens, click on link below
 - [How to Complete a CSI Demographic Record - 2023 CalMHSA](#)

Client Service Information (CSI) Overview

California Outcomes Measurement System (CalOMS)

- CalOMS is California's data collection and reporting system for Substance Use Disorder (SUD) treatment services
- Only SUPT Programs are required to report CalOMS data
 - NOTE: Recovery programs are not required to submit CalOMS data

CalOMS Information

- CalOMS Admission form must have all fields and sections completed in accordance with Department of Health Care Services (DHCS) requirements
- Keep in mind enter to all the information that you have and make it as complete as possible
- A new CalOMS is required any time the client is changing their Level of Care (LOC). If the LOC is changing to a new program within the same agency a new CalOMS will still be required
- Below is the link to SUPT documentation, scroll down to the “State Reporting” section to view the different CalOMS Tip Sheets
 - [Substance Use Documentation - 2023 CalMHSA](#)

- If your client's CalOMS admission was completed in Avatar, you will need to follow the step-by-step tip sheet posted on our webpage
- SUPT providers must complete the CalOMS Update/Discharge prior to the CalOMS Discharge
- Please see the tipsheet below:
 - [CalOMS Tip Sheet.pdf \(saccounty.gov\)](#)

CalOMS Annual Update/Discharge

Timely Access Data Tool (TADT)

All providers will use the TADT screen to track timeliness

There are four different TADT screens being used

- **MH Non-Psychiatric SMHS Timeliness Record (Client)**
 - Used for Medi-Cal beneficiaries who are making an initial request for non-psychiatric specialty mental health services
- **MH Psychiatric SMHS Timeliness Record (Client)**
 - Used for Medi-Cal beneficiaries who are making an initial request for psychiatric specialty mental health services
- **DMC Outpatient Timeliness Record (Client)**
 - Used for Medi-Cal beneficiaries who are making an initial request for SUPT outpatient services
- **DMC Opioid Timeliness Record (Client)**
 - Used for Medi-Cal beneficiaries who are making an initial request for opioid use disorder treatment services

Timely Access Data Tool (TADT) Cont.

- The TADT should be completed whenever a new client is enrolled into your program.
 - A new client is defined as a client who has not received Medi-Cal reimbursable services within the last 12 months.
- The form is a living document, it does not need to be completed at once. Once complete the form needs to be signed.
- There are Closure Reasons at the bottom of the form. If the client does not complete the process or is a no-show for their appointment the form can be closed out.
 - Closing the form out does not discharge the client. If the client leaves your program, you will still need to discharge them.

Timely Access Data Tool (TADT) Cont.

- CalMHSA has written instructions on their webpage for each of the TADT forms
 - MH Non-Psychiatric SMHS Timeliness Record (Client)
 - [How to Complete the MH Non-Psychiatric SMHS Timeliness Record - 2023 CalMHSA](#)
 - MH Psychiatric SMHS Timeliness Record (Client)
 - [How to Complete the MH Psychiatric SMHS Timeliness Record - 2023 CalMHSA](#)
 - DMC Outpatient Timeliness Record (Client)
 - [How to Complete the DMC Outpatient Timeliness Record - 2023 CalMHSA](#)
 - DMC Opioid Timeliness Record (Client)
 - [How to Complete the DMC Opioid Timeliness Record - 2023 CalMHSA](#)
- Sacramento County has also put together a tip sheet for SUPT providers on the requirements prior to entering the TADT
 - [SUPT TADT Tip Sheet.pdf \(saccounty.gov\)](#)

Part 3 -
Coverage

Client Eligibility

Coverage

Verifying Eligibility

It is important to verify medical eligibility for scheduled and unscheduled clients

The Medi-Cal website allows you to verify Medi-Cal eligibility, as well as Other Health Care (OHC) and Medicare coverage

- Each Payor is a Plan in SmartCare
- The start date of a plan must match the enrollment date if there was no plan previously entered
 - If there is already a plan date entered, it may have been entered by another agency where the client received services
- Coverage is client based
 - Do NOT remove a plan because the client may have that coverage with a different program
- After entering your coverage, enter a start date and add the plan. If the plan does not show up in the Plan Time Span section billing will not claim out
- If the client has insurance through a family member, that family member will need to be added as a Client Contact in the Client Information screen in order to link them to the Coverage screen
 - If the insurance from a family member is being entered, that family member will need to have their SSN, sex, and DOB entered in the client contacts fields
 - The Medi-Cal payor will always be entered as the actual client as the subscriber (even if the client is a minor)

Coverage Information

- Other Health Care (OHC)
- Medicare
- Medi-Cal
 - SUPT uses “Medi-Cal DMC” payor
 - MH uses “Medi-Cal MH” payor
- Managed Care Plan payors
- County Funds payor
 - SUPT uses “ADS DMC R Match” payor
 - MH uses “MH County Funds” payor

- To see a demonstration of the Coverage screens, click on link below, and view the Coverage/Plan section:
 - [How to Add a Coverage Plan - 2023 CalMHSA](#)

Coverage Plan Order

Demo

Coverage (Client)

- Adding new payors
- Setting the Coordination of Benefits (COB) order
- End dating a payor

Client Account (Client)

- Sacramento County has created reports specific to our county
 - Search “(SAC)” on your search bar to view Sacramento County specific reports
 - This will display reports that are within your role
 - A list of available reports are posted on the EHR webpage under the Technical Support tab. This will show all reports regardless of role, keep in mind you will only have access to reports that are included within your assigned role in the system
 - To view the list of reports, Click on the link below to view “Release Information”
 - [SmartCare Technical Support \(saccounty.gov\)](http://saccounty.gov)

Report Information

Program Coverage Report (SAC)

- Displays current open enrollments with the first 4 current Payors
 - This report will catch if coverage was not entered, the CIN number is missing, or if the client was not entered as the subscriber for their Medi-Cal Coverage

Program Coverage Report

████████████████████

Open enrollments Between 12/19/2024 and 12/19/2024 with First 4 Current Payers

Client ID	Client Name	Enrolled /DC	Cov1	Cov2	Cov3	Cov4
██████████	██████████	03/14/24	Medi-Cal DMC 96634632D			
██████████	██████████	04/24/24	Medi-Cal DMC 93534820D	ADS DMC R Match 567412748		
██████████	██████████	12/10/24	Medi-Cal DMC 92222751D	ADS DMC R Match 92222751D		
██████████	██████████	06/20/24	Medi-Cal DMC 92209815D			
██████████	██████████	11/22/24	Medi-Cal DMC	ADS DMC R Match		
██████████	██████████	04/15/24	(Not Subscriber) Medi-Cal DMC 93354330D	ADS DMC R Match 18		

UMDAP Financial Assessment (MH Only)

- UMDAP - Uniform Method to Determine Ability to Pay
- When a client is eligible for UMDAP, some of the coverage plans will need to be end dated depending on what payors your client has
- An UMDAP will not be required for a client/family with:
 - Full Scope Medi-Cal
- An UMDAP will be completed for client/family under the following circumstances:
 - Indigent/Self Pay
 - Medicare Only
 - Private Insurance Only
- NOTE: QM provides UMDAP training which includes the Fee Waiver process

Things to Keep in Mind When Entering an UMDAP

- The responsible party will need to be added as a client contact prior to filling out the UMDAP Financial Assessment (Client), **only** if the client is not the financially responsible party
 - The responsible party can be added as a contact by using the Client Information (Client) screen
 - When adding the contact, be sure to check the box for “Financially Responsible”
- There is no payor in the Coverage (Client) screen for UMDAP
 - If the client has an UMDAP you will make sure any Medi-Cal or county fund payors are end dated
 - Medicare and private insurance payors can remain active on the coverage screen

Part 4 -
Entering
Services

Services (Client)

Batch
Services (Client)

How are Services Entered?

Services/ Notes (Client)

Progress Note

Effective 09/14/2023 Status New Author Owens, Shalina

Service Note Billing Diagnosis Warnings

Service

Used by direct care staff to document and create services for a client.

Services (Client)

Service Detail

Service Detail Billing Diagnosis Authorization(s)

Service

Client... Test_Entry Status Show Start Date 09/14/2023 Program

Procedure Start Time End Date Face to Face Time 0.00

Clinician Name

Location Attending Referring

Client was present Other Person(s) Present Cancel Reason

Group... Charge \$0.00 Balance Rate ID

Admin staff can use Services (Client) to enter individual service(s). This can be used if an agency has their own EHR system and manually enters services into SmartCare. SmartCare user may use this to enter a service if a note was entered on a downtime form.

Batch Service Entry (My Office)

Batch Service Entry

07/25/2023 All Programs Staff Name All Procedure Groups Apply Filter

Client Preference M TU W TH F Also Include Complete/Show Services for the day Only Show Clients Seen In Last 90 Days

Last Name Begins With Last Name Begins With... Organizational Hierarchy

Default Values

Staff Procedure Code Time In Time Out Dur. Location

Staff Name

Admin staff use Batch Service Entry (My Office) to enter multiple Services for multiple days and multiple clients. This is primarily used by agencies with their own EHR.

Service Import

	ClientId	ClinicianId	ProcedureC	LocationId	DateOfService	EndDateOf	FaceToFace	TravelTime	Documenta	AttendingI	ReferringI
1											
2			93	14	8/3/2023 14:10		50	20	5		
3			93	14	8/1/2023 13:30		60	0	5		
4			105	14	8/1/2023 14:35		55	48	9		
5			93	13	8/1/2023 08:30		58	0	6		
6			73	13	8/1/2023 07:55		26	0	8		
7			105	11	8/1/2023 10:00		26	0	4		
8			105	14	8/1/2023 10:05		30	0	2		
9			105	3	8/1/2023 08:42		20	0	4		

Service import allows providers who use their own EHR the ability to import all monthly services.

Service Status Descriptions

Cancel: Used if the appointment was cancelled

Complete: Service has been validated after the overnight job

Error: Prevents a services from claiming out

Scheduled: The service was scheduled on the calendar but has not occurred yet

No Show: The client or staff did not show for the appointment

Show: The service occurred

- Batch Service Entry allows you to enter multiple services at one time
 - Multiple clients at the same time
 - Multiple days for one client
- This is particularly helpful for residential or NTP agencies who have their own EHR
 - This allows those providers to enter their fixed fee services for a duration rather than entering them one at a time
- Below is a link to the EHR team's Batch Service Entry Tip Sheet
 - [Batch Services Tip Sheet.pdf \(saccounty.gov\)](#)

Batch Service Entry (My Office)

Demo

Services (Client)

Batch Service
Entry (My Office)

Part 5 -
Additional
Service
Information

Diagnosis
Document (Client)

Pregnancy
Indicator

Diagnosis

- All clients must have an active DSM-5/ICD-10 Diagnosis entered that covers all dates of service in your program
- Some administrative staff enter diagnoses on behalf of direct care staff
- The diagnosis permission is granted based on classification or by special request
 - For staff who are entering on behalf of a diagnosing practitioner. In the Source field of the Diagnosis screen, enter the diagnosing practitioner's name and professional classification
- Please refer to the Diagnosis tipsheet on the EHR website:
 - [Diagnosis Tip Sheet.pdf \(saccounty.gov\)](#)
- Additional resources are also available on CalMHSA's website, under Diagnosis Entry:
 - [Clinical Documentation - 2023 CalMHSA](#)

- Without a diagnosis the services will not show up on your invoice for the county
- A diagnosis is required for **all** services
 - Effective dates should cover all dates of service
- The diagnosis must be entered in the program you are providing services
- The diagnosis must be signed
- The Service Diagnosis Error report can be run to view billing errors pertaining to Diagnosis
 - We will view this report during the Corrections section of training

Important Facts About Diagnosis

Diagnosis
Demo

Entering a
Diagnosis

- Medi-Cal requires providers to use a pregnancy indicator to specify when services are provided to a pregnant client
- In the “Client Clinical Problem Details (Client)” screen, Direct Care staff use SNOMED Code 248985009 (F34.90) to indicate the client is pregnant
 - Pregnancy end date is required to be entered once the client’s pregnancy has ended. This date should be the last date of the month, 365 days after the end of the pregnancy
- The SNOMED code is entered by Direct Care staff in the “Client Clinical Problem Details (Client)” screen
- Agencies with their own EHR, admin staff will be entering the pregnancy indicator on behalf of the direct care staff

Pregnancy Indicator

Part 6 - Service Corrections



Overnight Job



Resources to find service
corrections



Correcting services in show and
complete status

Overnight Job

- What is an Overnight Job?
 - Overnight Job validates the services entered into SmartCare
 - It will assign a status to each service that was entered: Show or Complete
 - **Complete:** service is ready to be claimed
 - **Show:** there may be some issues with the service that need to be addressed

Service Corrections

- Corrections should be made prior to services being claimed
- Changes can be made if the service is in a Show or Complete status
- Only administrative staff can make corrections to a service
 - Clinical staff can make changes to their documentation
 - Admin staff can edit the service only, not the documentation

What Service Information can be Edited

Services in Show Status

- Location
- Mode of delivery
- Start date
- Start time
- Program
- Procedure
- Service Time (Duration)
- Clinician name (Only if the note is not signed)

Services in Complete Status


- Location
- Mode of delivery
- Start date
- Start time
- Program
- Procedure (If the note type matches the new procedure)
- Service Time(Duration) (Billing team will need to regenerate the charge)

How to Find Services Needing Corrections?

- Service Needing Attention Widget
- Services (My Office) list page
 - Scroll to the far right to view “Failure to Complete Reasons”
 - If there is no rate on the Completed service (and it is NOT a non-billable), make sure Coverage has been entered
- Possible issues to look for:
 - Financial information has not been complete for the client
 - Refer to the Client Account Screen
 - Billing diagnosis required before completing the services
 - Run Services Diagnosis Error (Sac) (My Office) report
 - Unable to find matching rate for the selected procedure
 - Reach out to the EHR Billing team- BHS-EHRBilling@saccounty.gov

Services Needing Attention Widget

- On the SmartCare dashboard you will see the Services Needing Attention widget
 - Displays all errors within a note or service that need corrections

Services Needing Attention 	
Total of 'Show' charges: \$ 1272.43	
View All	15
Billing diagnosis required for completing the service	13
Financial information has not been completed for this c...	10
Unable to find a matching rate for the selected procedu...	10

Services Needing Attention Widget cont...

- After selecting “All” in the Services Needing Attention Widget, the Services (My Office) list page will display all clients, services, and warnings to correct

My Services (15)

All Clients All Statuses All Procedures All Programs **Apply Filter**

Custom Date From To **Services With Errors**

Only include Services with Add On Codes Staff **Organizational Hierarchy...**

Client	Auth	DOS	Procedure	Units	Program	Status	Staff	Group Name	Comment	Cancel	Warnings	Add On Codes	Attach
Test, Billy (1069)		09/08/2023 11:00 AM	Psychothe...		Turning P...	Signed	Owens, Shalina				Billing diag.		
Test, Jamie (1206)		09/08/2023 10:00 AM	Psychothe...		BACS-OP C	Signed	Owens, Shalina				Financial in		
Test, Bell (1046)		09/08/2023 09:00 AM	Mental He...		El Hogar-...	Signed	Owens, Shalina				Billing diag.		
Test, Bell (1046)		08/29/2023 09:00 AM	Care Mana...		FFS-Adult.	Signed	Owens, Shalina				Unable to fi		
Test, Lawrence (1086)		07/25/2023 09:00 AM	Housing P...		APCC-TWC	Show	Owens, Shalina				Unable to fi		
Test, Debra (1103)		07/25/2023 09:00 AM	Housing P...		APCC-TWC	Show	Owens, Shalina				Financial in		
Test, Benjamin (1148)		07/25/2023 09:00 AM	Housing P...		APCC-TWC	Show	Owens, Shalina				Unable to fi		
Pan, Peter (1024)		07/25/2023 09:00 AM	Housing P...		APCC-TWC	Show	Owens, Shalina				Financial in		
Day, Jessica (1009)		07/25/2023 09:00 AM	Housing P...		APCC-TWC	Show	Owens, Shalina				Financial in		
Test, Marg (1137)		07/18/2023 09:00 AM	Group Tra...		APCC-TWC	Show	Owens, Shalina				Financial in		
Test, Brit (1186)		07/18/2023 09:00 AM	Group Tra...		APCC-TWC	Show	Owens, Shalina				Financial in		
Knotts, Don (1080)		07/18/2023 09:00 AM	Group Tra...		APCC-TWC	Show	Owens, Shalina				Financial in		
Day, Jessica (1009)		07/18/2023 09:00 AM	Group Tra...		APCC-TWC	Show	Owens, Shalina				Financial in		
Test, Barry (1041)		05/16/2023 09:00 AM	Alcohol &...		BACS-CWC	Show	Owens, Shalina				Financial in		
Test, Barry (1041)		05/15/2023 09:00 AM	Hypnother...		BACS-CWC	Signed	Owens, Shalina				Financial in		

Services(My Office)

- Run the Services (My Office) list page to view the Failure to Complete Reason(s):

Services (168) Select Action ★ ★

All Services ▼ **Show** ▼ Include Do Not Complete ▼ All Programs ▼ Financial Assignment... ▼ **Apply Filter**

All Locations ▼ All Procedure Codes ▼ All Clinicians ▼ All Service Entry Staff ▼ All Service Areas ▼

Service Id Entered From Entered To **DOS From** 09/01/2022 **DOS To** 09/30/2023

Include Services created from Claims Only include Services with Add On Codes Only show Non-Billable Services Show Only Active Clients

Client Name **Organizational Hierarchy...**

Select: All, All on Page, None

Client Name	DOS	Units	Charge (Rate Id)	Procedure	Status	Clinician	Program	Location	Comment	Failure to Complete Reason(s)
	08/29/2023 9:00 AM			Care Management Se...	Show	Owens, Shali...	FFS-Adult O...	Office		Billing diagnosis req...
	08/22/2023 11:30 PM		40.00 (22)	Crisis Intervention S...	Show	Duthler, Kristi	APSS-SAC-E...	Office		Financial informatio...
	08/22/2023 10:00 AM		147.90 (1...	Community-Based W...	Show	Trainer, Four	BACS-OP CO...	Telehealth - ...		Must have a signed ...
	08/22/2023 8:00 AM		1309.29 (...)	Psychotherapy for Cri...	Show	Duthler, Kristi	APSS-SAC-E...	Office		Financial informatio...
	08/22/2023 12:00 AM			Engagement	Show	Duthler, Kristi	APSS-SAC-E...	Office		Unable to find a mat...
	08/08/2023 3:00 PM			Housing Plan Develo...	Show	Draper, Ama...	BACS-CWC C...	Office		Unable to find a mat...
	08/07/2023 3:00 PM			Housing Plan Develo...	Show	Draper, Ama...	BACS-CWC C...	Office		Unable to find a mat...

Financial Information has not been Completed for the Client

- Check the Client Account screen to make sure box is checked

Client Account

Overview Charge/ Payment Summary

Account Information

Client Name	Test, Entry
Financially Responsible	Test, Entry
Current Client Balance	\$0.00
Unpaid Services	\$0.00
Unposted Payments	\$0.00
Last Statement Sent	
Payment Arrangement Amount	0
Client Fund Balance	0

3rd Party Payer Information

Plan	Balance	Unbilled Amt	>90 Days	Flagged
Blue Cross - Van Nuy...	\$19,319.53	\$19,319.53	\$0.00	

Payment History

Last 30 Days Show Client Payments Only

Payer	Date	Amount	Check#	Unposted Amount
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Internal Collections
 External Collections
 Don't Send Statement

Reason

Financial Information is Complete

Accounting Notes

Services Diagnosis Error (Sac) Report

- If you see a failure reason that says **Billing Diagnosis Required** run the Services Diagnosis Error (sac) report to find the diagnosis error and make the necessary corrections in the Diagnosis Document (Client) screen

Service Diagnosis Errors



T [REDACTED]

Program Name	Client Name	clientid	Error Type	First Problem Service	First DX
[REDACTED]	[REDACTED]	[REDACTED]	First DX Effective Date AFTER Date of Service	7/1/23	7/26/23
[REDACTED]	[REDACTED]	[REDACTED]	NO DX in Program of Service	7/19/23	
[REDACTED]	[REDACTED]	[REDACTED]	DX on file is not signed	7/21/23	7/21/23
[REDACTED]	[REDACTED]	[REDACTED]	First DX Effective Date	8/3/23	8/5/23

Part 7 - Discharge

Client Programs
(Client)

Next Steps

Important Information Regarding a Discharge

- A discharge is done when the client's treatment has ended or based on QM requirements for your program
- Make sure all required elements are completed before completing the discharge
- Be sure to choose the correct program
- SUPT providers **must** complete the CalOMS Update/Discharge prior to the completing the Discharge in SmartCare
- When choosing a discharge reason, refer to the Discharge Option document provided by QM
 - <https://dhs.saccounty.gov/BHS/Documents/Provider-Training/dischargeoptions.pdf>

Demo

➤ Discharge- Client Program (Client)

How can I get additional help?

- **CalMHSA LMS Trainings-** CalMHSA has provided many training videos and materials on their webpage [Home - 2023 CalMHSA](#). There are interactive training videos as well as training guides which can be printed out and referenced
- **BHS EHR Team** can be contacted by e-mail and phone
 - E-mail: BHS-EHRsupport@SacCounty.gov
 - Phone: 916-876-5806
 - Office Hours: Monday-Friday 8am-5pm, except for county holidays

- **BHS EHR Training-** Contact for training registration or account updates
 - BHS-EHRTrainingReg@saccounty.gov
- **BHS EHR Billing-** Contact for billing or claiming questions
 - BHS-EHRBilling@saccounty.gov
- **Quality Management-**Contact for documentation questions
 - QMInformation@saccounty.gov
- **Quality Management Staff Registration-**Contact for license updates
 - DHSQMStaffReg@saccounty.gov

Additional Support

Additional Training

- Before gaining access to SmartCare you will need to complete the LMS training modules that were sent with the training confirmation
- After completing each module you'll take the quiz on the LMS portal
 - You'll need at least 80% to pass each quiz, the quizzes can be taken more than once
 - Take a screenshot of the passing score and save on an email or Word doc
 - The training registration team may ask for a screenshot of your score to verify your results
- The trainings are found on CalMHSA's LMS portal, there is a tip sheet on our webpage which goes over how to create an account on the portal

Required LMS Trainings

- **SmartCare Basics for all Users:**
 - Message from Director
 - Basic Navigation
 - Privacy and Security in SmartCare
- **SmartCare Clinical Workflow for Clinicians (Life Cycle of a Client):**
 - Life Cycle of a Client: Requests for Services, Screening, and Intake & Assessment
 - Life Cycle of a Client: Services
- **SmartCare for Billing Staff**
 - Billing: Adding Coverage & Eligibility
 - Billing: MMEF & UMDAP