BHS-SAC Team Service Authorization Request Tip Sheet

This Tip Sheet is intended for the BHS-SAC Team and will walk users through the process of receiving, reviewing and approving a service authorization request. This tip sheet may change as training is updated. Please view our webpage for the most up to date version. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

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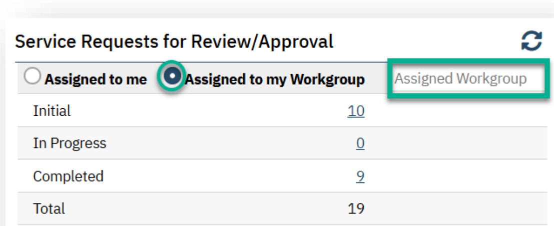
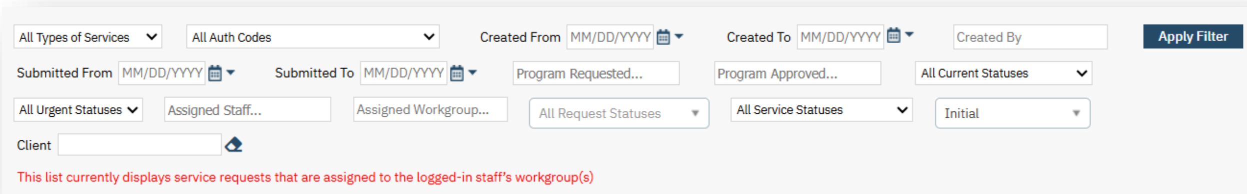
How to find Service Authorization Requests Assigned to A Workgroup

The **Service Requests for Review/Approval** Widget displays requests assigned to you or assigned to your Workgroup. This widget will need to be added to your dashboard. See the next section for step-by-step instructions on how to add a widget to your dashboard.

1. **Navigate to your Dashboard**. If you are not on your Dashboard, select the SmartCare icon in the upper left hand corner or search the Dashboard (My Office) screen
2. **Select the radio button** next to *Assigned to my Workgroup*.



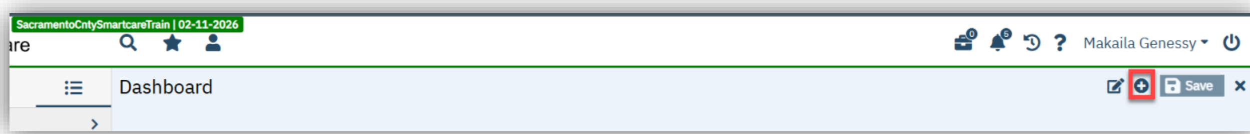
3. **Enter the name of the workgroup in the textbox** on the right side of the radio button and select the appropriate workgroup – BHS Sac Service Auths
4. Selecting the workgroup will pull up all service requests assigned to that workgroup with the following statuses:
    - **Initial**: Requests that have been submitted but have not yet been processed.
    - **In Progress**: Requests that have started to be processed but are not yet completed.
    - **Completed**: Requests that have been fully reviewed, either approved or denied and authorizations that have been created.
5. Clicking on the hyperlink for the request will take you to the "*My Service Request – Review/Approval List*" list page. You can use the filters to search for requests that have been submitted.



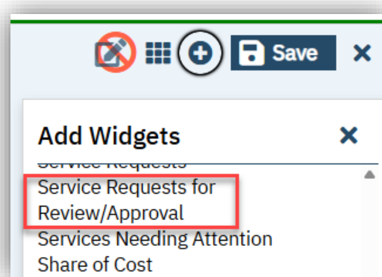
How to Add a Widget to your Dashboard

To add a widget, follow instructions at this link: [How to Add a Widget to your Dashboard]

1. **Navigate to your Dashboard**. If you are not on your Dashboard, select the SmartCare icon in the upper left hand corner or search the Dashboard (My Office) screen
2. Below your name on your dashboard, **click the + icon**.



3. **Click to select the widget you want to add** when the Add Widget menu appears.
4. The widget will be added at the bottom of your dashboard. **Click and drag the widget** to your desired location.
5. **Click Save**.

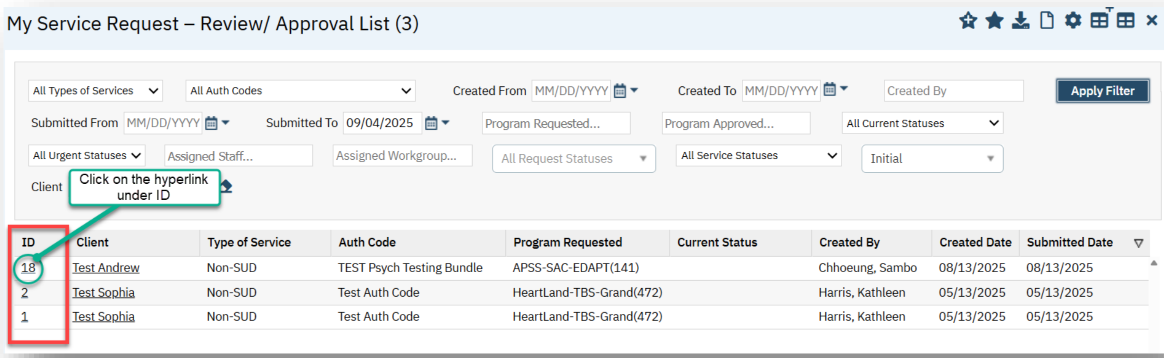


Updated 04/15/2026

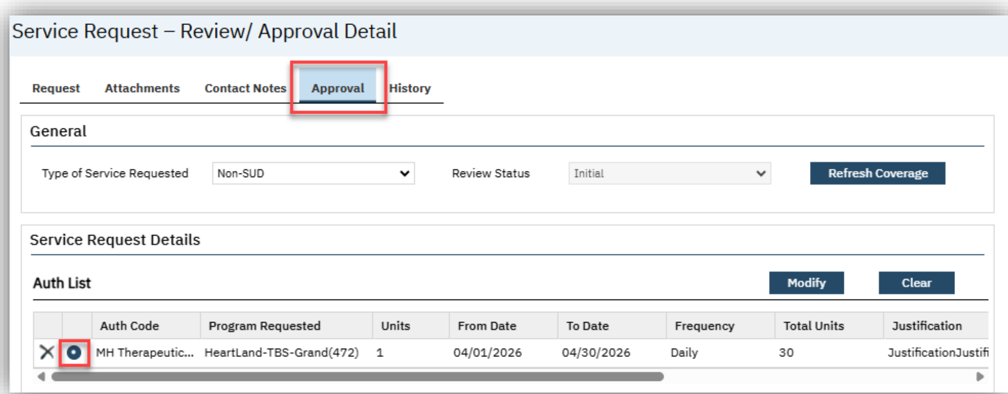
How to Process a Service Authorization Request

How to Review a Service Authorization Request

1. On the *My Service Request – Review/Approval* List page, click on the hyperlink under **ID**.



2. This will take you to the *Service Request – Review/Approval Detail* screen which is separated into five different tabs.
    a. The *Request* tab is where the requester enters the information of the request and is not editable but this information pulls forward to the approvals tab.
    b. The *Attachments* tab allows you to view all attachments that the requester included as part of their service authorization request and is viewable but not editable.
    c. The *Contact Notes* tab is not currently used.
    d. The *Approvals* tab is where you can see the type of service requested as well as the status of the review.
    e. The *History* tab will show you the full history of this request.
3. **Click on the Approval tab.**
4. In the *Service Request Details* section, make sure that the Auth that you are reviewing is selected. The radio button should automatically be selected. This will bring the information into the fields below based on what was initially requested.

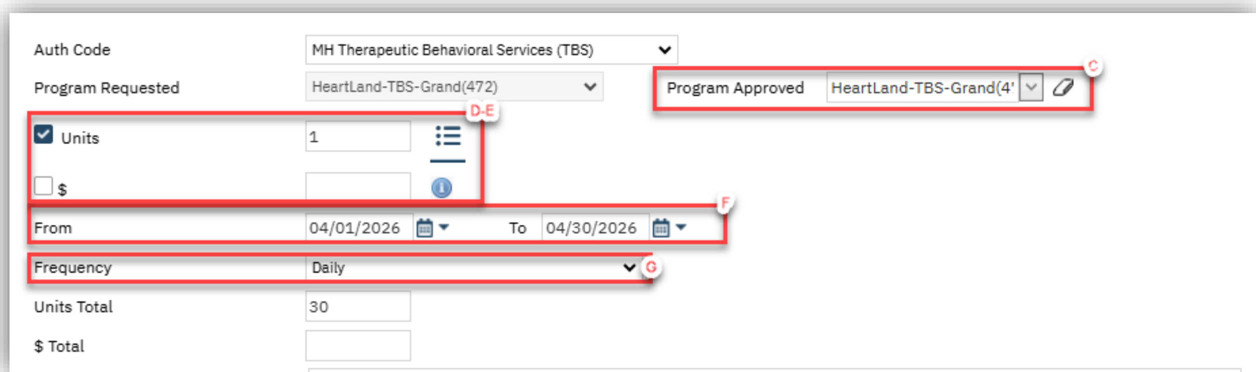


5. Review the service authorization request such as the **Auth Code, Unit**, **From/To fields**, and **Frequency.**

How to Approve a Service Authorization Request

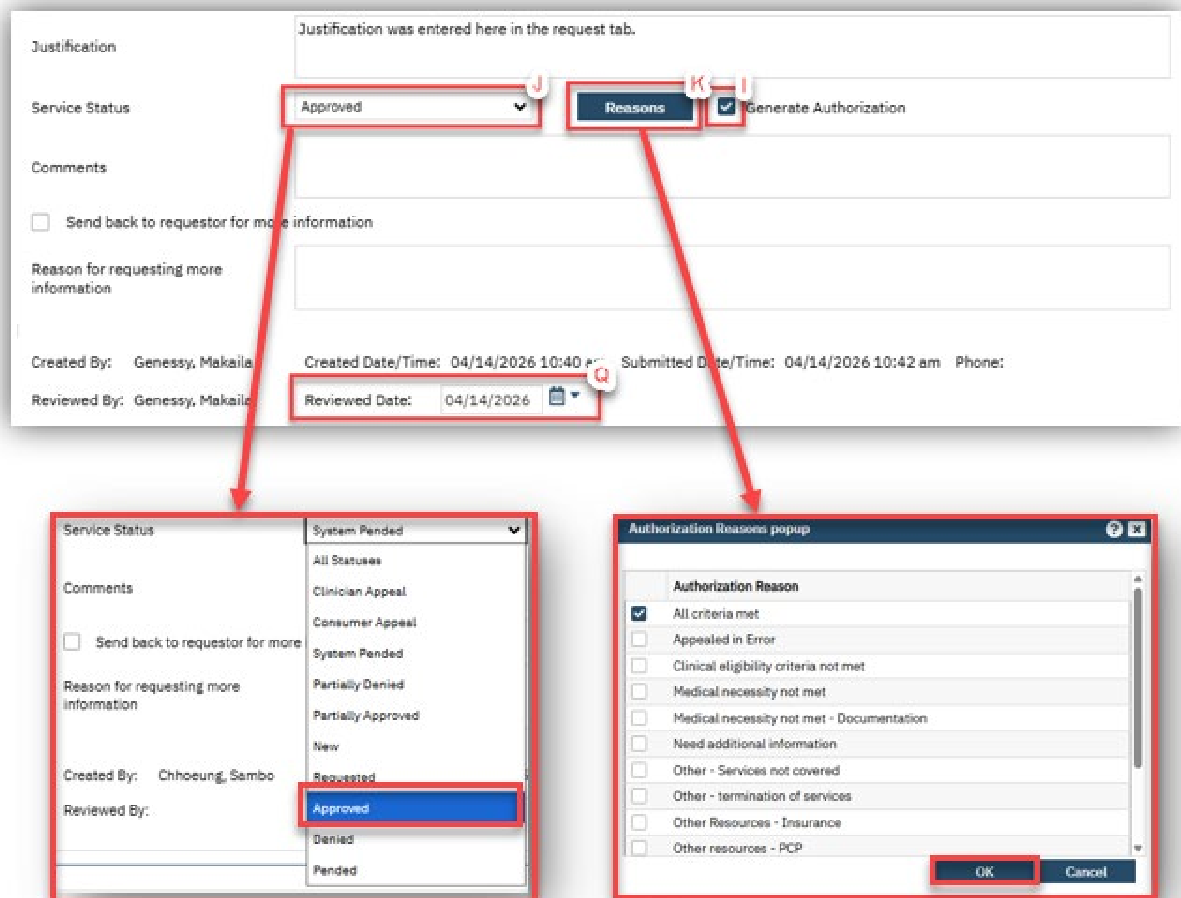
When processing a Service Authorization Request (SAR) for approval follow the steps below, please note this is functionality guidance, not guidance on documentation. Any questions regarding documentation policies and procedures should be directed to Quality Management.

1. **Navigate to your Dashboard**. If you are not on your Dashboard, select the SmartCare icon in the upper left hand corner or search the Dashboard (My Office) screen
2. **Select the radio button** next to *Assigned to my Workgroup*.
3. From the *Service Request for Review/Approval* Widget **click the blue number hyperlink in the initial line.**
4. This will navigate you to the *My Service Request – Review/Approval List* list page, from here **click on the hyperlink under ID** to go into the service authorization request
5. **Click on the Approval Tab**.
6. In the Service Request Details section, review the information that has pulled forward from the request tab that was inputted by the requester and document as needed.
    a. **Auth Code**: The auth code pulls forward from the request tab and can be updated here if needed
    b. **Program Requested:** The Program Requested pulls forward from the request tab and is not editable.
    c. **Program Approved:** Select the **Program** that the client is approved for.
        i. For example, if the request was for TBS programs but the requested program was not a good fit, you can select the appropriate program under the Program Approved drop down.
    d. **Units:** The units should be pulled over. If not, select the checkbox and en09ter 0.
    e. **$:** Leave Blank. We do not use this field.
    f. **From/To:** Enter the Date Range that is approved for this SAR
    g. **Frequency:** Enter the Frequency that is approved for this SAR
    h. **Units Total:** The Units total will populate automatically from units/frequency

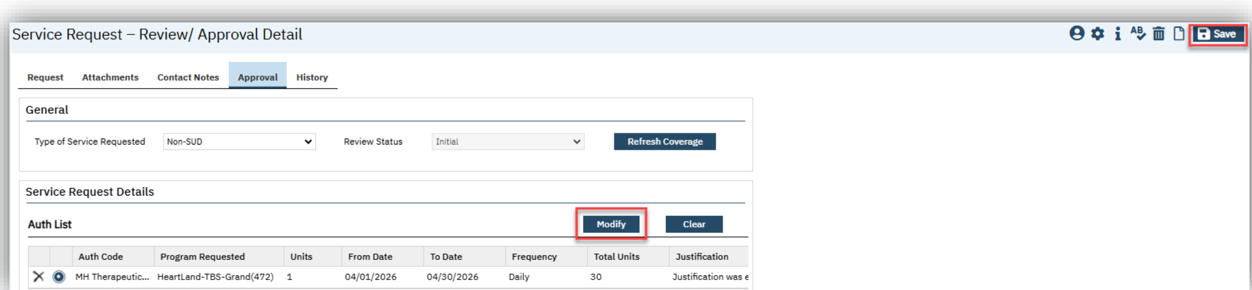


    i. **Justification:** This is the requestor's justification for why the authorization is being requested. This text box is editable.
    j. **Service Status**: Select Approved
    k. **Reasons:** Click on this box to pull up the **Authorization Reasons popup**. Select the appropriate Authorization Reason and hit "**okay**".
    l. **Generate Authorization**: Check the box
    m. **Comments:** Add any comments as necessary.

n. **Send back to Requestor for More Information**: N/A
o. **Reason for Requesting More Information**: N/A
p. **Created By/Date/Time:** Populates Automatically
q. **Review Date**: Add the date that the request was reviewed. Whether the status is Approved, Denied, or Pended, a date must be entered in this field.



7. Once the request has been filled out and completed, click the **Modify** button at the top.
8. Click **Save** at the top right of the screen.

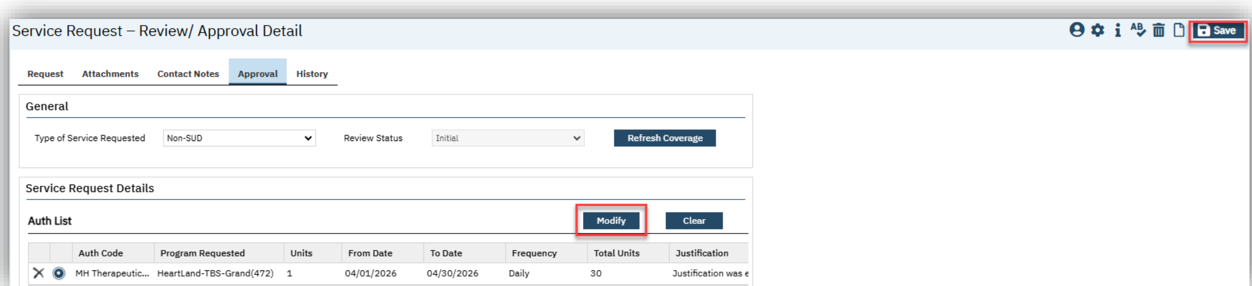


How to Deny a Service Authorization Request

When processing a Service Authorization Request (SAR) for denial follow the steps below, please note this is functionality guidance, not guidance on documentation. Any questions regarding documentation policies and procedures should be directed to Quality Management.

1. **Navigate to your Dashboard**. If you are not on your Dashboard, select the SmartCare icon in the upper left hand corner or search the *Dashboard (My Office)* screen
2. From the *Service Request for Review/Approval* Widget **click the blue number hyperlink in the initial line.**
3. This will navigate you to the *My Service Request – Review/Approval List* list page, from here **click on the hyperlink under ID** to go into the service authorization request
4. **Click on the Approval Tab**.
5. In the Service Request Details section, the following fields will pull forward from the request tab that was inputted by the requester.
    a. Auth Code, Program Requested, Justification, Units, $, From/To, Frequency, and Units Total (Program Approved will be left blank)
6. When processing a denial please fill out the following fields:
    a. **Service Status**: Select Denied
    b. **Reasons:** Click on this box to pull up the **Authorization Reasons popup**. Select the appropriate Authorization Reason and hit "**okay**".
    c. **Generate Authorization**: Check the box

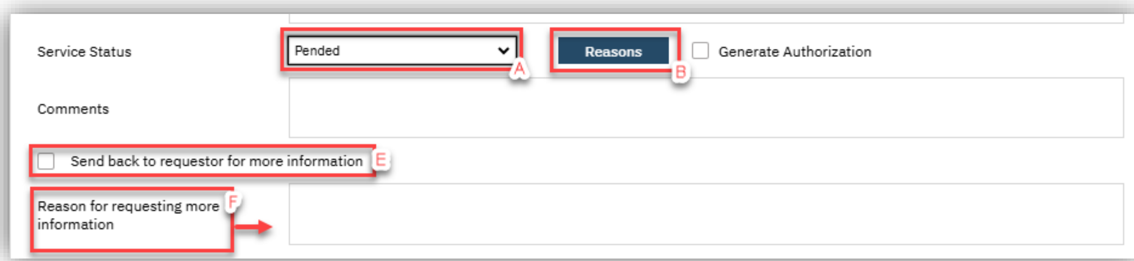
    d. **Comments:** Add any comments as necessary.
    e. **Send back to Requestor for More Information**: N/A
    f. **Reason for Requesting More Information**: N/A
    g. **Created By/Date/Time:** Populates Automatically
    h. **Review Date**: Add the date that the request was reviewed. Whether the status is Approved, Denied, or Pended, a date must be entered in this field.
7. Once the request has been filled out and completed, click the **Modify** button at the top.
8. Click **Save** at the top right of the screen.



How to Request More Information for a Service Authorization Request

When reviewing a Service Authorization Request (SAR) and needing additional information to proceed with processing, follow the steps below.

1. **Navigate to your Dashboard**. If you are not on your Dashboard, select the SmartCare icon in the upper left hand corner or search the *Dashboard (My Office)* screen
2. From the *Service Request for Review/Approval* Widget **click the blue number hyperlink in the initial line.**
3. This will navigate you to the *My Service Request – Review/Approval List* list page, from here **click on the hyperlink under ID** to go into the service authorization request
4. **Click on the Approval Tab**.
5. In the Service Request Details section, the following fields will pull forward from the request tab that was inputted by the requester.
    a. Auth Code, Program Requested, Justification, Units, $, From/To, Frequency, and Units Total (Program Approved will be left blank)
6. When requesting additional Information or documentation for a Service Authorization Request please fill out the following fields:
    a. **Service Status**: Select Pended
    b. **Reasons:** Click on this box to pull up the **Authorization Reasons popup**. Select the appropriate Authorization Reason and hit "**okay**".
    c. **Generate Authorization**: N/A
    d. **Comments:** Add any comments as necessary.
    e. **Send back to Requestor for More Information**: Check the box
    f. **Reason for Requesting More Information**: A reason is required in this field to save.



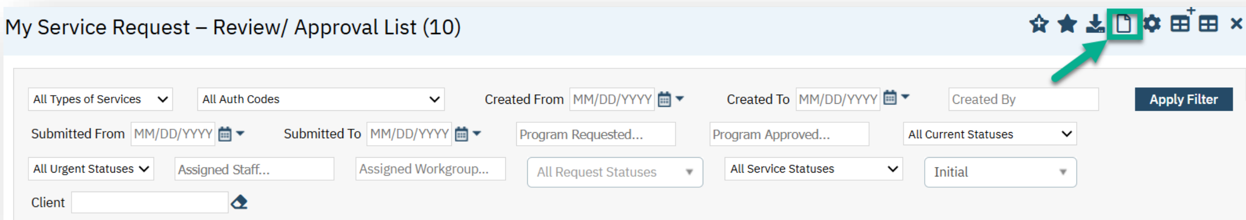
    g. **Created By/Date/Time:** Populates Automatically
    h. **Review Date**: Add the date that the request was reviewed. Whether the status is Approved, Denied, or Pended, a date must be entered in this field.
7. Once the request has been filled out and completed, click the **Modify** button at the top.
8. Click **Save** at the top right of the screen.
9. Please note that if you selected to send the service request authorization back to the requester for more information, you need to click **Modify** and **Save** ***twice***. This will push the *Reasons for requesting information* text box to populate in the Request tab for the requester to view.

How to create a Service Authorization Request if you are entering on behalf of the Requestor (Out-of-County SAR)

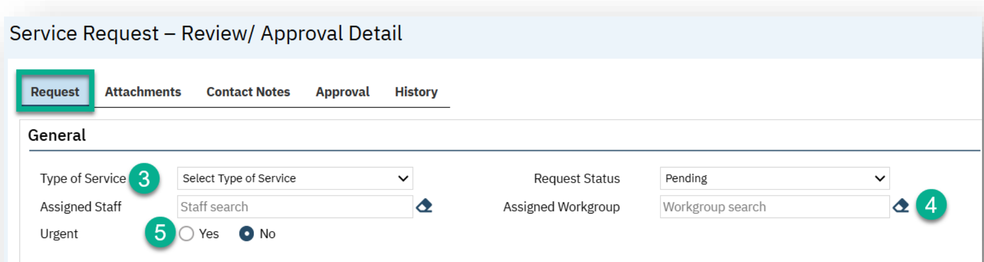
Please note that prior to entering an out-of-county SAR, the client may not already be in the system. The client may need to be created, and coverage may need to be added before starting the request.

Entering a Service Authorization Request as The Requester only

1. **Search *My Service Request List (My Office)***, this will bring you to a list page.
2. On the *My Service Request List (My Office)* list page. **Click on the New Icon** in the upper right-hand corner of the screen.

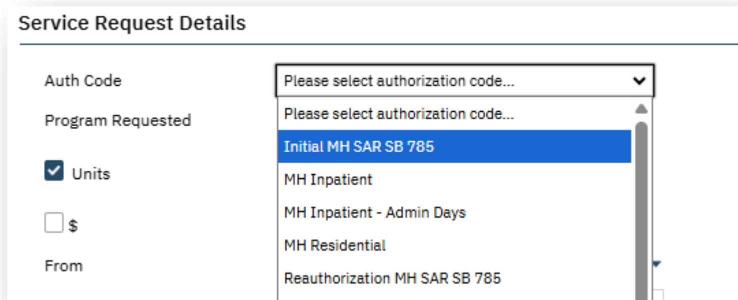


3. A client search box will pop up. **Select the client** you need to create a Service Authorization Request For.
4. This will take you to the *Service Request – Review/Approval Detail* screen which is separated into five different tabs. When submitting a service request as only the requestor we will only be looking at the tabs below:
   a. The *Request* tab is where the <u>requester</u> enters the information of the request
   b. The *Attachments* tab is where the <u>requester</u> uploads or attaches documentation supporting the need for requested service.
   c. The *History* tab will show you the full history of this request.
5. **Click on the Request tab.**
   a. General
      i. **Type of Service**: Select the type of service from the dropdown
      ii. **Request Status:** The Request status auto populates, we will updating this section later.
      iii. **Assigned Staff**: Do not use
      iv. **Assigned Workgroup**: BHS-SAC Service Auths
      v. **Urgent**: This field will default to "No" if unselected, but **select Yes**



b. Service Request Details

i. **Auth Code**: From the dropdown, select the appropriate Authorization Code for the services that is requested. For an out-of-county SAR, the user would select MH SAR SB 785 depending on if it's an Initial request or a reauthorization.



ii. Select the program requested to provide the services.

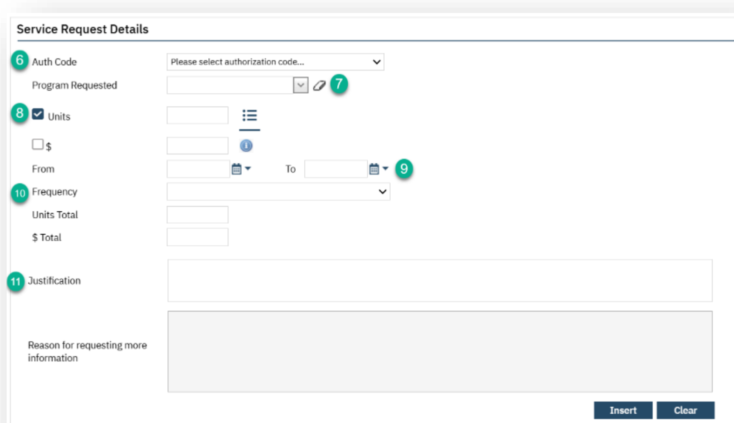
iii. **Unit:** Select the appropriate unit specific to the requested Auth Code. The Units Total will populate once we enter a value in this field.

iv. **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.

v. **Frequency:** Select the frequency based on the Auth Code chosen.

vi. **Units Total:** Auto populates based on number of unit(s) and frequency entered above.

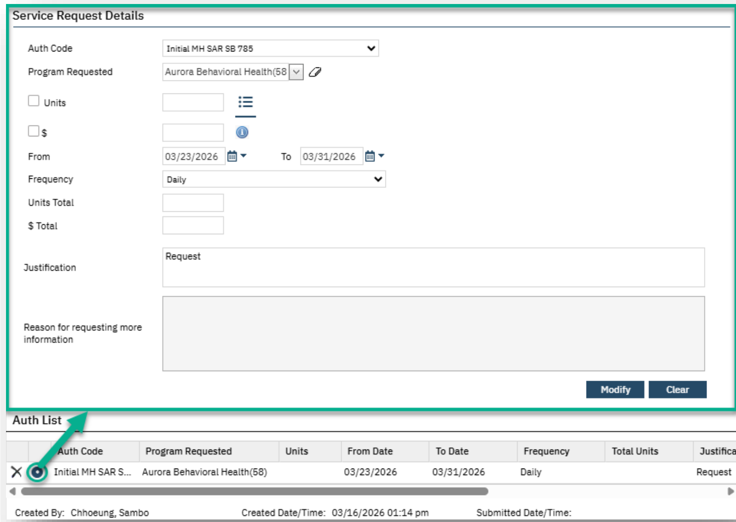
vii. **Justification:** Enter the justification for the service authorization request.



viii. Click **Insert.**

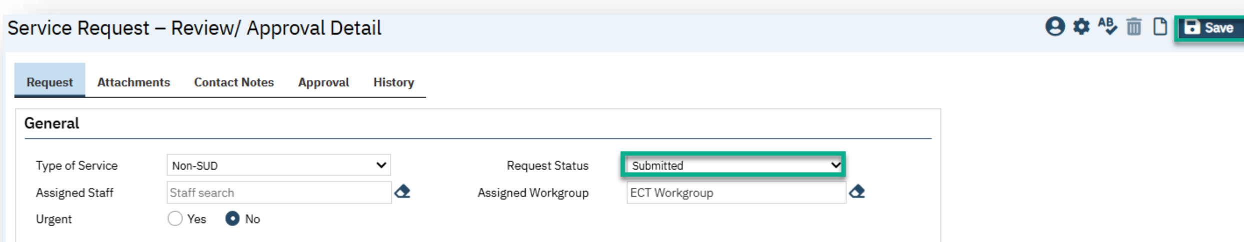
ix. Click **Save.**

x. After clicking insert, the created request will then appear on the screen in the Auth List.



c. NOTE: **Do not update** the Request Status box <u>**yet**</u> or you will not be able to scan documents on the next tab.

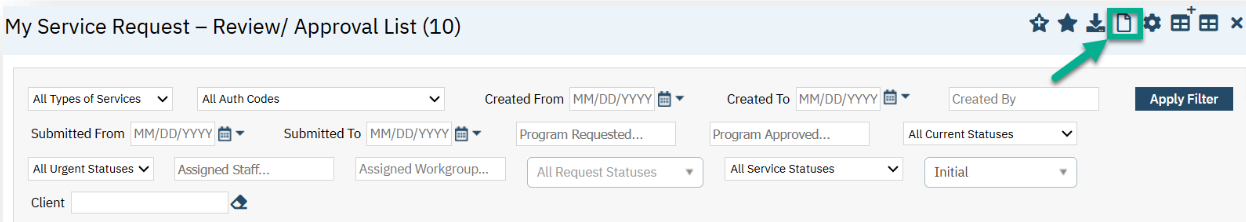
6. If there is documentation that needs to be attached to the request, **Click on the Attachment tab** and follow instructions located here.
7. **Click on the Request tab**
   a. In the **Request Status box**– Select **Submitted**.



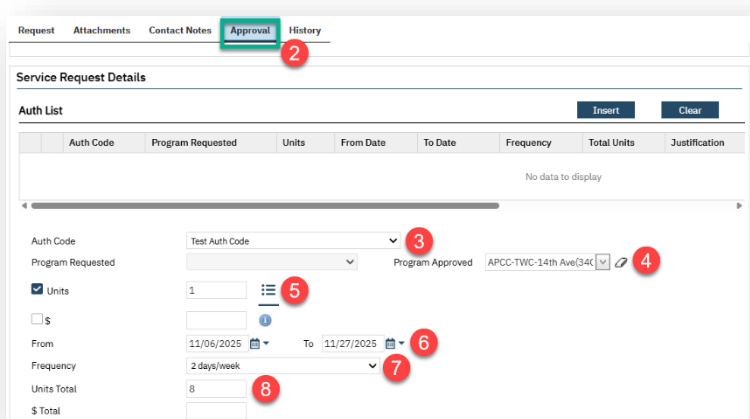
8. Click **Save**
9. To process the request, follow the same steps in:
   a. [**How to Approve a Service Authorization Request**](How to Approve a Service Authorization Request)
   b. [**How to Deny a Service Authorization Request**](How to Deny a Service Authorization Request)

How to Create a Service Request Authorization if you are the Requestor & Approver

1. **Search *My Service Request List (My Office)***, this will bring you to a list page.
2. On the *My Service Request List (My Office)* list page. **Click on the New Icon** in the upper right-hand corner of the screen.



3. A client search box will pop up. **Select the client** you need to create a Service Authorization Request For.
4. This will take you to the *Service Request – Review/Approval Detail* screen which is separated into five different tabs. When submitting and approving the service request at once we will only be looking at the tabs below:
    a. The *Request* tab is where we will change the service status
    b. The *Attachments* tab is where supporting documentation will be attached or uploaded.
    c. The *Approval* tab is where we will enter and approve the request.
    d. The *History* tab will show you the full history of this request.
5. **Click on the Approval Tab**.
6. In the Service Request Details section, enter in the information for the fields below.
    a. **Auth Code**: Select the appropriate **Auth code** for the request
    b. **Program Requested:** N/A
    c. **Program Approved:** Select the **Program** that the client is approved for.
    d. **Units:** Enter the unit in the **Units** text box.
    e. **From/To:** Select the **date range** of the service
    f. **Frequency:** Select the **frequency** of the service(s)
    g. **Units Total:** The Units total will populate automatically from units/frequency



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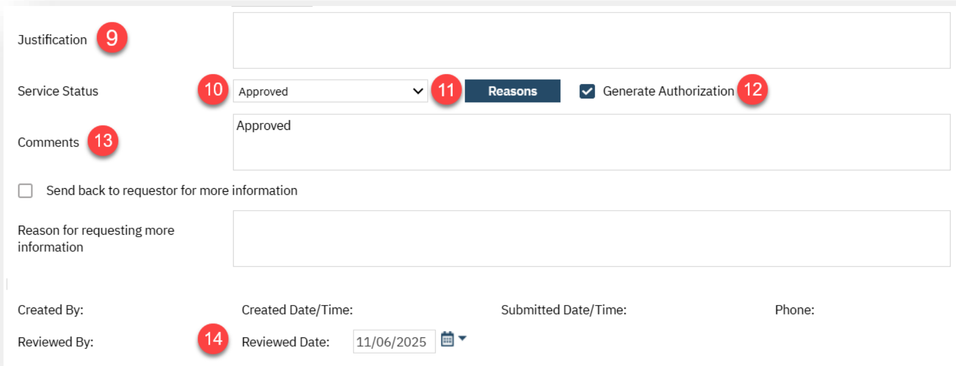
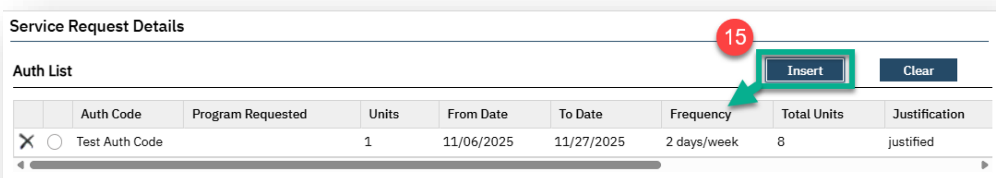
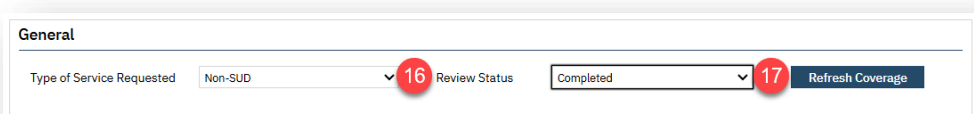
h. **Justification:** Enter the **reason** for the service authorization request in the text field.
i. **Service Status**: Select Approved
j. **Reasons:** Click on this box to pull up the **Authorization Reasons popup**. Select the appropriate Authorization Reason and hit "**okay**".
k. **Generate Authorization**: Select this checkbox.
l. **Comments:** Add any comments as necessary.
m. **Send back to Requestor for More Information**: N/A
n. **Reason for Requesting More Information**: N/A
o. **Created By/Date/Time:** Populates Automatically
p. **Review Date**: Add the date that the request was reviewed. Whether the status is Approved, Denied, or Pended, a date must be entered in this field.



7. Click **Insert** and that will drop the service authorization you just created under *Auth List.*
8. Click **Save** at the top right of the screen.
9. If there is documentation that needs to be attached to the request, **Click on the Attachment tab** and follow instructions located [here](#).



10. **Click on the Request tab**
    a. General Section:
        i. **Type of Service Requested**: select **Non-SUD**
        ii. **Request Status box**: Select **Completed**.



11. Click **Save** at the top right of the screen.

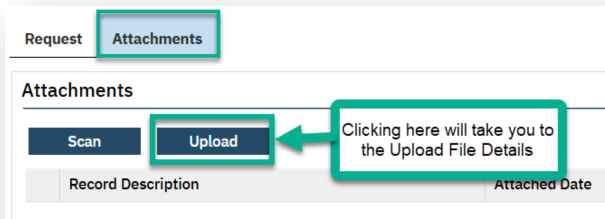
Attaching and Scanning documents into a Service Authorization Request

The **Attachments Tab** allows you to scan or upload documents and attach documents from the Document (client) screen. You are only able to edit the attachment tab prior to submitting the request, but documents are always viewable.

Scanning & Uploading Documents for a Service Authorization Request

Please Note: Scanning and Uploading Documents directly in the attachments tab within the Service Authorization Request makes these documents **only** viewable within the request.

1. **Navigate to the Service Authorization Request** if you are not already within.

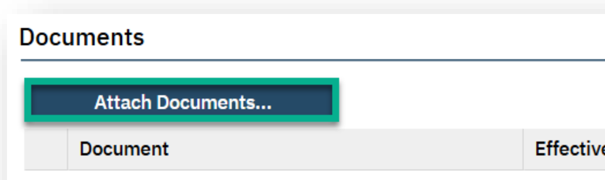


2. **Click on the Attachments tab**
    a. Attachments Section:
        i. Select Scan: this option would be in you have a hard scanner attached.
        ii. Upload: clicking on the *Upload* button will take you to the *Upload File Detail* screen which will be the same process as *Scanning (My Office)*.

Attaching Documents in the client's chart to the Service Authorization Request

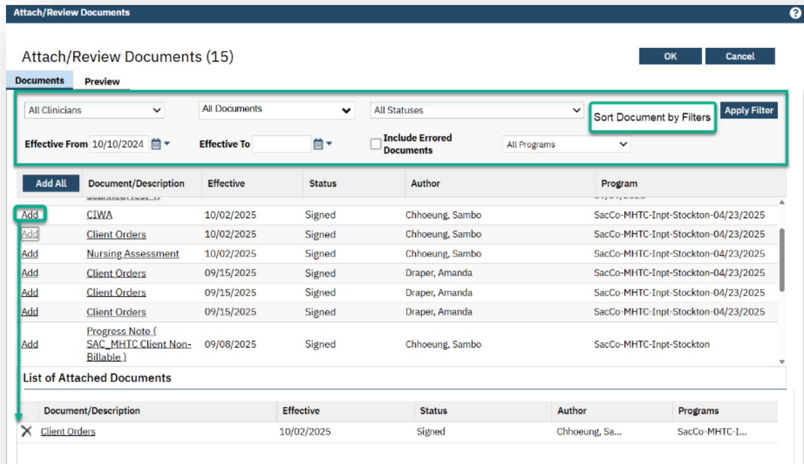
If documentation needs to be scanned or uploaded into the client's chart so it can be attached to the Service Authorization Request follow the CalMHSA guide for scanning and uploading documents into SmartCare and see QM's Sacramento County Scanned Document Naming Convention Form to view the naming convention and folder selection for scanned documents.

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



1. The Attach/Review Documents box will pop up. Use the filters at the top to sort the documents if necessary.

2. 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.



3. 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.
4. Once all documents have been attached and reviewed, **click Ok**.