## SCANNED DOCUMENT MANAGEMENT

		SCANNED DOCUMENT MANAGEMENT			
	SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments	
	Access	Access Referral	Mental Health Service Request Form (Date)		
March	Access	Detailed Authorization for Out of County Clients	Detailed Auth for OOC (Date)		
	Access	Hospital Appointment Letters	Hospital Appointment Letters (Date)		
	Access	Unable to Contact Letters	Unable to Contact Letters (Date)		
Comment   Comm	Access	Presumptive Eligibility Letters (AB 1299)	PT Eligibility (AB1299) (Date)		
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	SCANI	NED DOCUMENT MANAGEMENT	
SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
Education/Employment	DOR/Crossroads Papers	DOR/Crossroads Papers (Date)	
Education/Employment	EC Prescription Referral Form	EC Prescription Referral Form (Date)	
Education/Employment	EC Release of Information	EC Release of Information (Date)	
Education/Employment	IEP (Individualized Education Plan)	IEP (Individualized Education Plan) (Date)	
Education/Employment	School Records (Report Cards, etc.)	School Records (Report Cards, etc.) (Date)	
Education/Employment	SSTs	SSTs (Date)	
Financial/Insurance (scanned)	Advanced Beneficiary Notice (ABN)	Advanced Beneficiary Notice (ABN) (Date)	
Financial/Insurance (scanned)	Agreement to Pay (ATP) – white copy (Historical Document Replaced with FIF in 2016)	Agreement to Pay (ATP) (Date)	Historical Document Replaced with FIF in 2016
Financial/Insurance (scanned)	Correspondence from Social Security (i.e. change of payor/payee)	Correspondence from Social Security (Date)	(i.e. change of payor/payee)
Financial/Insurance (scanned)	Insurance Face sheet	Insurance Face sheet (Date)	
Financial/Insurance (scanned)	Medical Screen from the Meds System	Medical Screen from the Meds System (Date)	
Financial/Insurance (scanned)	VA Contact Sheet	VA Contact Sheet (Date)	
Financials	Financial Information Form (FIF)	Financial Information Form (FIF) (Date)	
Financials	UMDAP	UMDAP (Date)	
FSP 3M (scanned)	FSP 3M	3M (Date)	
FSP KET (scanned)	FSP KET	KET (Date)	
FSP PAF (scanned)	FSP PAF	PAF (Date)	
HIPAA	Acknowledgement of Receipt	Acknowledgement of Receipt (Date)	
HIPAA	Accounting Of Disclosures	Accounting Of Disclosures (Date)	
HIPAA	Client Request for Access to Health Record and M.D. Approval form	Client Request for Access to Health Record and M.D. Approval form (Date)	
HIPAA	Notice of Privacy Practices	Notice of Privacy Practices (Date)	
HIPAA	Privacy Policies by Year	Privacy Policies by Year (Date)	
HIPAA	Request to Amend Records and Approved or Denied Response Forms	Request to Amend Records and Approved or Denied Response Forms (Date)	
			Please label the Clinical Introductory Note and the
Historical Chart Documents	All Historical Documents Prior to Avatar	Historical Documents prior to SmartCare (Date)	Initial Psychiatric Assessment
Historical Chart Documents	Client Merge Notification	Client Merge Notification (Avatar) (Date)	
			CWRT entry into SmartCare became effective
Historical Chart Documents	Historical Medi-Cal Mobile Benefit Documentation Prior to Entry in SmartCare	Historical Medi-Cal Mobile Benefit Documentation (Date)	5/30/2024.
Homeless Doc	Chronic Homelessness Verification Form	Chronic Homeless Verification Form (Date)	
Homeless Doc	Disability Certification	Disability Certification (Date)	
Homeless Doc	Proof of Income (No Income, Public Assistance, SSI Award Letter, Employment)	Proof of Income Paperwork (Date)	
Homeless Doc	Rent Assistance Calculator	Rent Assistance Calculator (Date)	
Homeless Doc	Service Animal/Companion Animal Certification	Service Animal Document (Date)	
Homeless Doc	Third Party Homeless Verification	3rd Party Homeless Verficiation (Date)	
Hospitalization/IP (scanned)	Hospital Discharge Paperwork (including Psychiatric hospitals)	Hosptial Discharge Paperwork (Date)	
ID/Insurance Cards	Identification card	ID Card (Date)	
ID/Insurance Cards	Insurance Card (e.g., Medi-Cal, Medi-Care, Insurance card photocopies)	Insurance Card and photocopies (Date)	
ID/Insurance Cards	Miscellaneous card (i.e., UCDMC card)	Miscellaneous Cards-(Name of Card) (Date)	
Incoming Correspondence	Medical Records Requests	Medical Requests Request (Date)	
Inpatient	Concurrent Review Documents	Concurrent Review Docs (Date)	
Inpatient	Inpatient UR Tool	UR Tool (Date)	
Inpatient	TAR	TAR (Date)	
Intake Paperwork	Ambulance packet	Ambulance packet (Date)	
Intake Paperwork	ISU Nurse to Nurse Patient Final Arrival Screening	ISU Nurse Arrival Packet/Screening (Date)	
Intake Paperwork	JV 583 Form	JV 583 from (Date)	
•			
Intake Paperwork Intake Paperwork	Reception Patient Worksheet Referral Packets - clients accepted	Reception Patient Worksheet (Date) Referral Packets (Date)	ISU: Should be included in Intake packet

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	SCATTLED BY	OCUMENT MANAGEMENT	
SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
take Paperwork	TFC Referral Form & Screening Tool	TFC Referrel & Screening Tool Document (Date)	TFC Referral Form & Screening Tool into TFC Episo
•			
take Paperwork	VA contact sheet	VA Contact Sheet (Date)	(Admitted MHTC, Crestwood Intake Scans)
b Orders	EKG Results	FKC Davids (Data)	
b Orders	Laboratory Results	EKG Results (Date)  Lab Results (Date)	
b Orders	PPD Results letter	PPD Results (Date)	
b Orders	Pregnancy Tests	Pregancy Test Results (Date)	
b Orders	TB test results	TB Test Results (Date)	
b Orders	X-Ray Results	X-Ray Results (Date)	
b Orders	A-ray results	A-Ray Results (Date)	
edication History Request Consent			
edication History Request Consent	CURES	Cures (Date)	
edication History Request Consent	CURES	Cures (Date)	
edication History Request Consent	Informed Consent for Treatment with Psychotropic Drugs	Informed County Durch store in Durch (Date)	
edication History Request Consent	informed Consent for Treatment with Psychotropic Drugs	Informed Consent-Psychotropic Drugs (Date)	
canned)	JV220 Documents	JV220 Documents (Date)	
edication History Request Consent	JV220 Documents	17220 Documents (Date)	
canned)	Medical Practitioner (MD, PA, etc) notes	Medical Notes	Historical
edication History Request Consent	Inventar Practitioner (MD, PA, etc) notes	Medical Notes	Historical
canned)	Client Prescription Refill Request	Prescripion Refill (Date)	
edication History Request Consent	Cheft Prescription Refin Request	Prescripton Rettin (Date)	
canned)	Prescriptions	Perscriptions (Date)	
•	Prescriptions	Perscriptions (Date)	
Medication History Request Consent	Psychiatric Referrals	Psychatiric Referrals (Date)	
scanned)	PSychiatric Referrals	PSychatric Referrals (Date)	
интс	Billing/Response letters to billers	Billing/Response Letters (Date)	MHTC
MHTC	Client Merge Notification	Client Merge Noticiation (Date)	MHTC Only
IHTC	Denial of Rights Documentation Record- 15 min. Pink sheet	Deniel Rights Packet (Date)	,
IHTC	Interview Summary from Crisis Residential	Interview Summary of Crisis Residential (Date)	MHTC - (pink sheet)
IHTC	Law Enforcement / MCST FAST Form	Law Enforcement/MCST FAST Form (Date)	
ни	Law enforcement / MCS1 FAS1 Form	Law enforcement/MCS1 FAST Form (Date)	Title to use of AAAD consents to /TV DDAI/Cton disselve
ALLTC	MAD: (Touches and (Anna diagnatics and DDN)	AAADS (Down)	Title type of MAR separately (TX,PRN/Standing) a
1HTC	MARs (Treatment/Standing and PRN)	MARS (Date)	put date range
ІНТС	MHTC Accounting of Disclosures	MHTC Accounting of Disclosures (Date)	MHTC Only
			Stamp individual RX as scanned and place in hard
1НТС	MHTC Medical Consultation Request and documentation back from ED or outpatient appointment	MHTC Medical Consultation Request (Date)	chart on unit
			If no ROI be sure to record release of records to
1HTC	MHTC Subpoenas	MHTC Subpoenas	County Council on Accounting of Disclosures
інтс	Missing Persons Form	Missing Persons Form (Date)	MHTC Only
IHTC	Letter from MHTC M.D. or clinician (Not related to 1370 or Benefits, i.e. letter to employer to excuse from work due to hospitalization)	Letter from MHTC MD (Date)	
IHTC	Property Reports / signed	Property Reports	
IHTC	Property Request Forms	Property Requests	C. HAD. I
			Scan all MD orders as one document and title wit
IHTC	All Physician Orders	Physican Orders (Date)	date range
ІНТС	Provider Behavioral Plans/ISU MD Letter to ERs	Provider Behavioral Plans & ISU MD Letter (Date)	MHTC Only
нтс	Red Alert Sheets	Red Alert Sheets (Date)	MHTC Only
нтс	MHTC Referral Packets - clients NOT accepted	Referral Packets (Date)	
нтс	Seclusion or Restraint Patient Debriefing	Seclusion or Restraint Patient Debriefing (Date)	
IHTC	Sleep Log	Sleep Log (Date)	
IHTC	Tarasoff Forms	Tarasoff Documents (Date)	MHTC Only
интс	Termination of Conservatorship (if client is not inpatient at the time)	Termination of Conservatorship (Date)	MHTC Only

Termination of Conservatorship (Date)

NOABD - Authorization Delay (Date)

NOABD - Delivery System (Date)

Termination of Conservatorship (if client is not inpatient at the time)

NOABD

NOABD

NOABD

MHTC

(Scanned)

NOABD - Authorization Delay

NOABD - Denial (Scanned)

NOABD - Delivery System (Scanned)

NOABD - Financial Liability (Scanned) NOABD

NOABD - Denial (Date) NOABD - Financial Liability (Date) 4 Last revised: 6/3/2024

MHTC Only

SmartCare Categories for Scanning	Document Name/Type	Naming Convention for Description in SmartCare: (Document Name and Date of Document)	Comments
Similar Caregories io. Scanning	Doument turney 1 pe	······································	Comments
ABD - Grievance/Appeal Timeliness			
anned)	NOABD	NOABD - Grievance/Appeal Timeliness (Date)	
AAD AA 117 (C	NOAD	NOTE WITH THE PROPERTY OF THE	
OABD - Modification (Scanned)	NOABD	NOABD - Modification (Date)	
OABD - Payment Denial (Scanned)	NOABD	NOABD - Payment Denial (Date)	
rayment Demar (Ocalinea)	1101.00	Torribe Taymen benefit to the Control of the Contro	
ABD - Termination (Scanned)	NOABD	NOABD - Termination (Date)	
OABD - Timely Access (Scanned)	NOABD	NOABD - Timely Access (Date)	
			Providers with their own EHR will upload documentation supporting medical necessity for children/youth presumptively transferred to Sacramento
oviders with their own EHR	Client Plans	Client Plans (Date)	
oviders with their own EHR	Core Assessments	Core Assessment (Date)	
oviders with their own EHR	Initial Psychiatric Assessments	Initial Psychiatric Assessments (Date)	
oviders with their own EHR oviders with their own EHR	Medication Service Plans TBS Adjunct Client Plan	Medication Service Plans (Date) TBS Adjunct Client Plan (Date)	
oviders with their own EHR	TBS Adjunct Client Plan	TBS Adjunct Client Plan (Date)	
ferral (scanned)	Intensive Services Referral (LOCUS)	Intensive Services (LOCUS) (Date)	
ferral (scanned)	RX from other agencies (i.e. RX from Med Clearance)	Rx-other agencies (Date)	
ferral (scanned)	DHCS Transition of Care Tool	Transition of Care Tool (Date)	
lease of Information (scanned)	Access Team or SOC ROI	Access Team/SOC (Date)	
lease of Information (scanned)	Any ROI	Name of ROI Entity (Date)	
lease of Information (scanned)	Family Notification	Family Notification (Date)	
lease of Information (scanned)	MDT ROI	MDT	
reening	ISU Patient Tuberculosis and Heath Questionnaire	Screening-ISU Patient Tuberculosis and Heath Questionnaire (Date)	
cerinig	130 Fatient Taberculosis and Heath Questionnaire	Screening 150 Fatient Fuberculosis and Teath Questionnaire (Date)	
C	System of Care (SOC) Authorization	SOC Authorization for Services (Date)	
С	SOC Referral	SUPT Service Request Form (Date)	
PT	CIWA (Alcohol Assessment by M.D.)	CIWA/COWS (Date)	
РТ	Medical clearance or Physician letters	Physicals from MDs (Date)	
	After Care Form	After Coar Farm (Data)	МНИСС
rmination/Exit Documents rmination/Exit Documents	Photographs (i.e. injuries, etc.)	After Care Form (Date) Photographs (Date)	MHUCC
mination/Exit Documents	Friotographs (i.e. injuries, etc.)	Filotographis (Date)	
sting/Evaluation	Psychiatric Tests	Psychiatric Test (Date)	
sting/Evaluation	Psychological Assessment Summary	Psychological Assessment Summary (Date)	
sting/Evaluation	Psychological Tests	Psychological Test (Date)	
atment Plan (scanned)	Behavioral Contract	Behavioral Contract (Date)	Once signed by patient, this will be scanned
atment Plan (scanned)	Client Plan (if signature was obtained later, if Avatar was offline, etc.)	Historical Client Plan (with signature) (Date)	
atment Plan (scanned)	Discharge Plans	Discharge Plans/Summaries Paperwork (Date)	
atment Plan (scanned) atment Plan (scanned)	Crisis Residential Weekly Updates Inpatient Program Schedule	Crisis Residential Weekly Updates (Date) Inpatient Program Schedule (Date)	
atment Plan (scanned)	INDITION PROGRAM SCHOOLING ISU Team Discharge Instructions for Minors	ISU Team Discharge Instructions for Minors (Date)	
atment Plan (scanned)	Mental Health Wellness Plan	Mental Health Wellness Plan (Date)	
eatment Plan (scanned)	MHSA Client Housing Plan	Historical MHSA Client Housing Plan (Date)	
, ,			
eatment Plan (scanned)	Safety Plans	Safety Plans (Date)	If not using the Safety Crisis Plan within SmartCar

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