Creating a New Client ID Tip Sheet

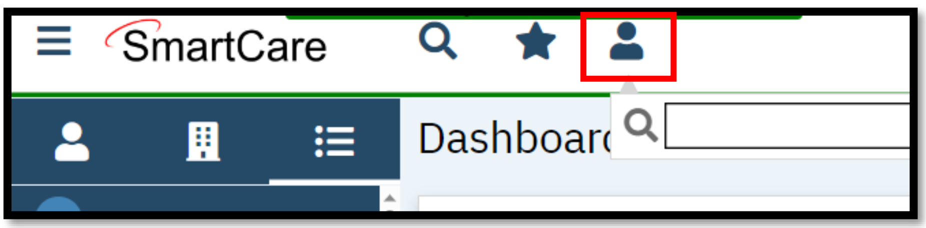
This Tip Sheet will walk users through how to create a new client ID in SmartCare. This process is intended for agencies that do not use the Inquiries screen. If your agency completes inquiries please see the Provider Inquiry Tip Sheet. This Tip Sheet may change as our trainings and systems are updated. Please visit our website BHS EHR (saccounty.gov) for the most updated version. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

How do I know I need to create a new client?

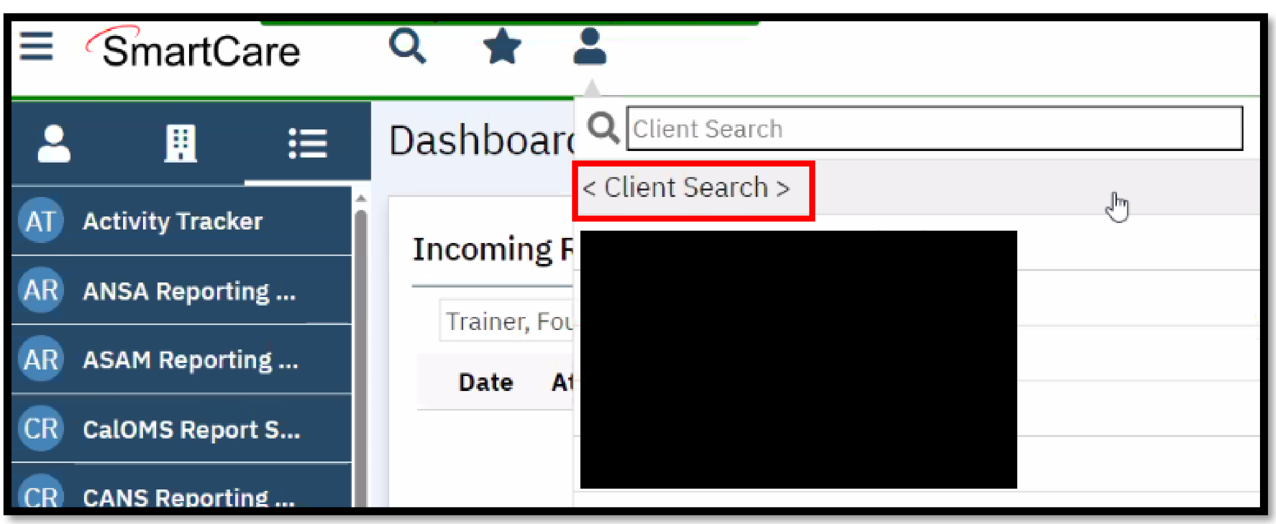
When enrolling the client into your program by using “Client Programs (Client)”, if the client is not populating when you search for them, you will need to create a new client ID.

How to Add a Client to SmartCare

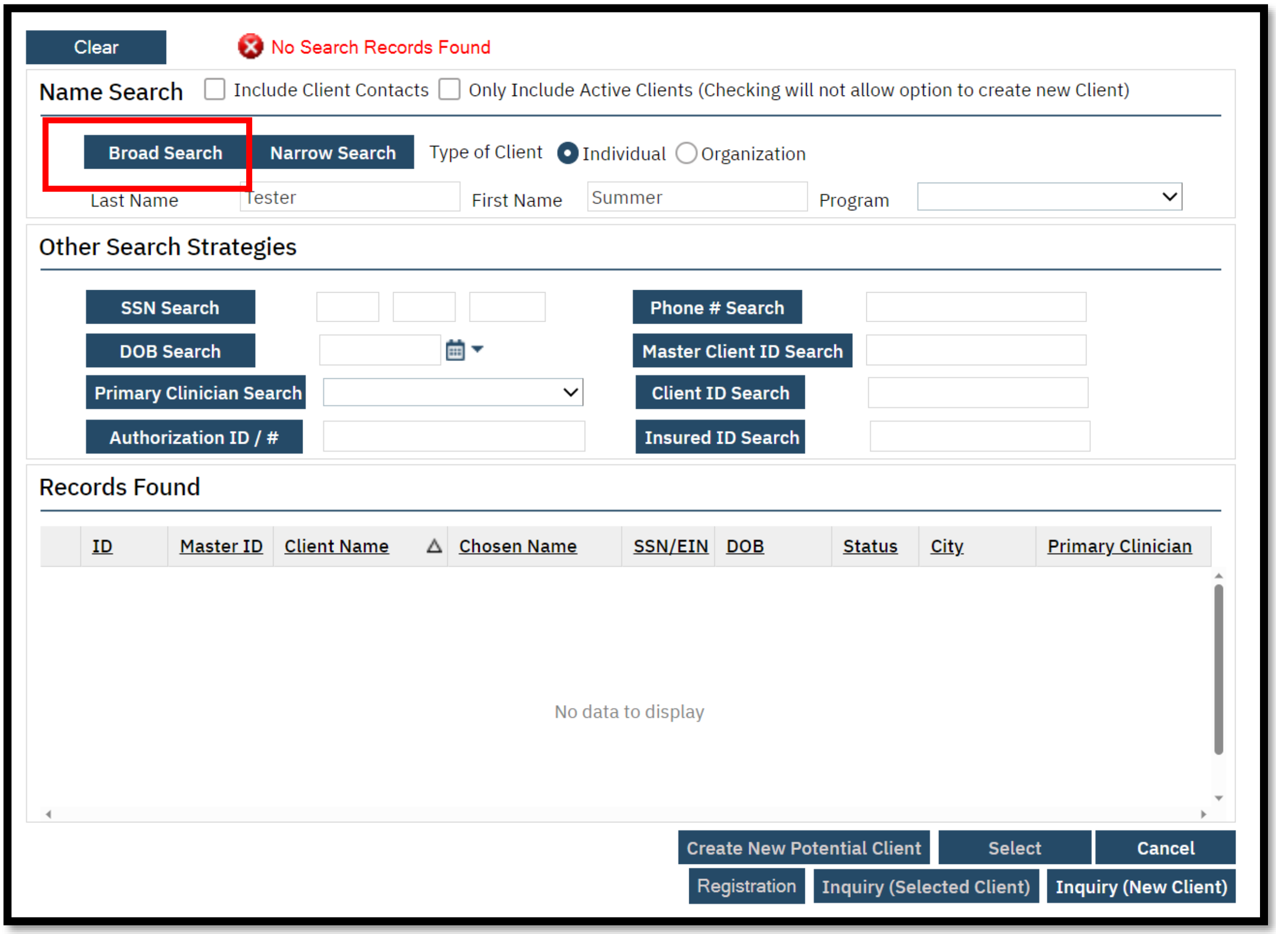
1. Click on the “Client Search” icon.



2. Click on “Client Search”. If you click on the search bar or anywhere outside of it that option will go away. If that happens click on the “Client Search” icon again to bring it up.

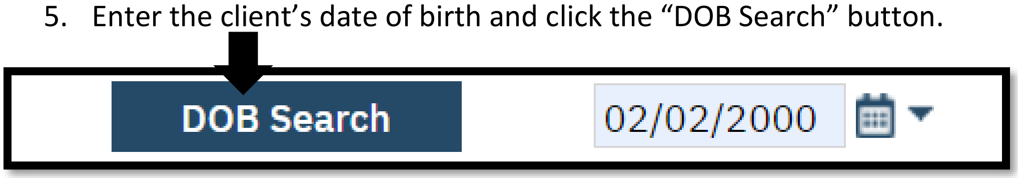


3. Enter the clients last and first name and click “Broad Search”. If no one matches that description you’ll get a message saying “No Search Records Found”. If there is a close match they will be listed below. If you do not see your client listed move on to step 4. If you do see your client you select them.

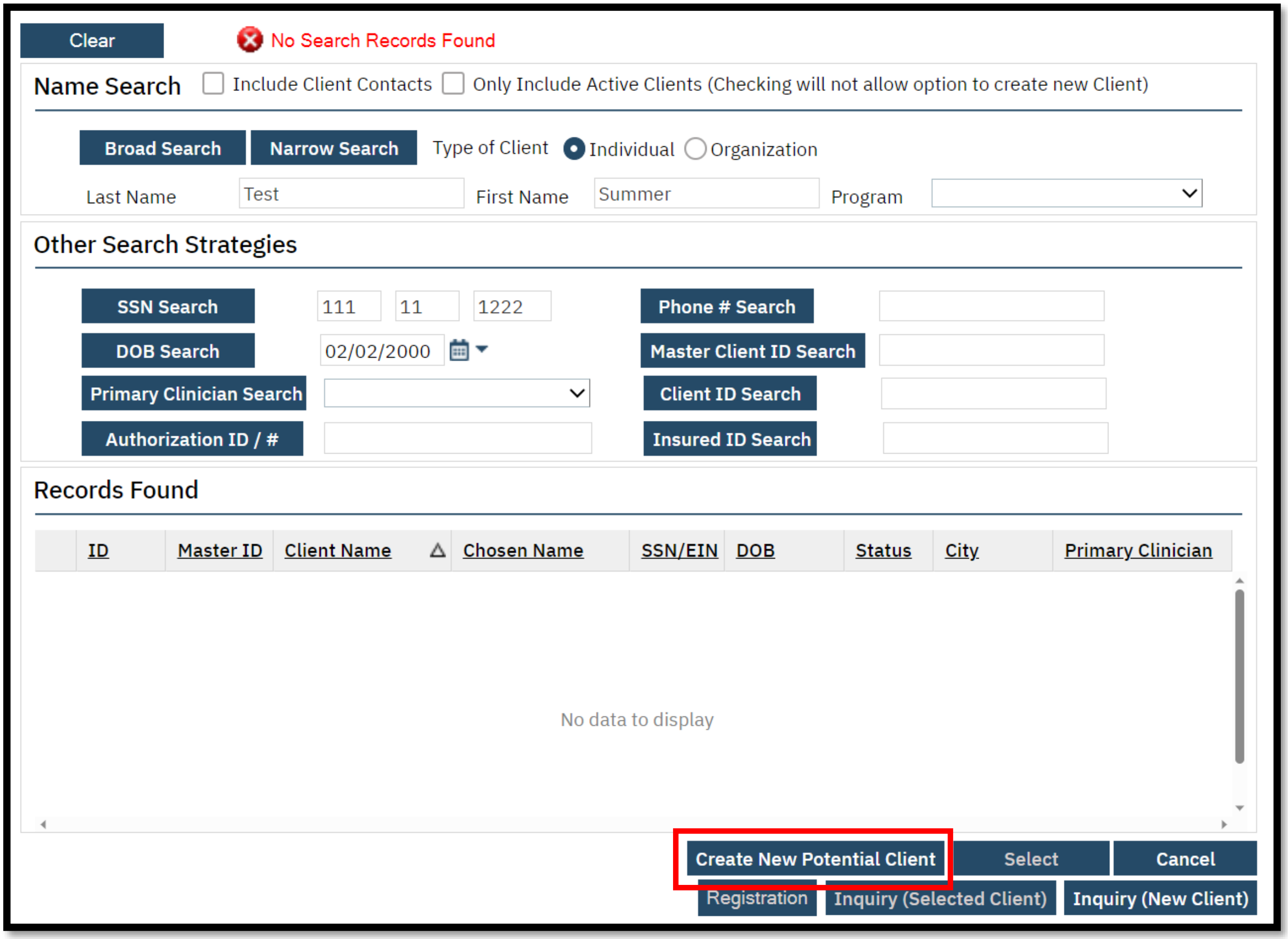


4. Next, enter the SSN number and click the SSN Search button.

5. Enter the client’s date of birth and click the “DOB Search” button.



6. After you've completed all three searches the "Create New Potential Client" button will open. Click on there to create the new client.



7. Once the client has been created, you can enroll them into your program.