Provider Inquiries Tip Sheet

This Tip Sheet will walk users through how to enter and view inquiries. 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.

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Inquiries Information

An inquiry is used to request services into a program. This can be done for new clients or existing clients. An inquiry should be done before a client enrolls into your program or when you are requesting they be enrolled into a different program.

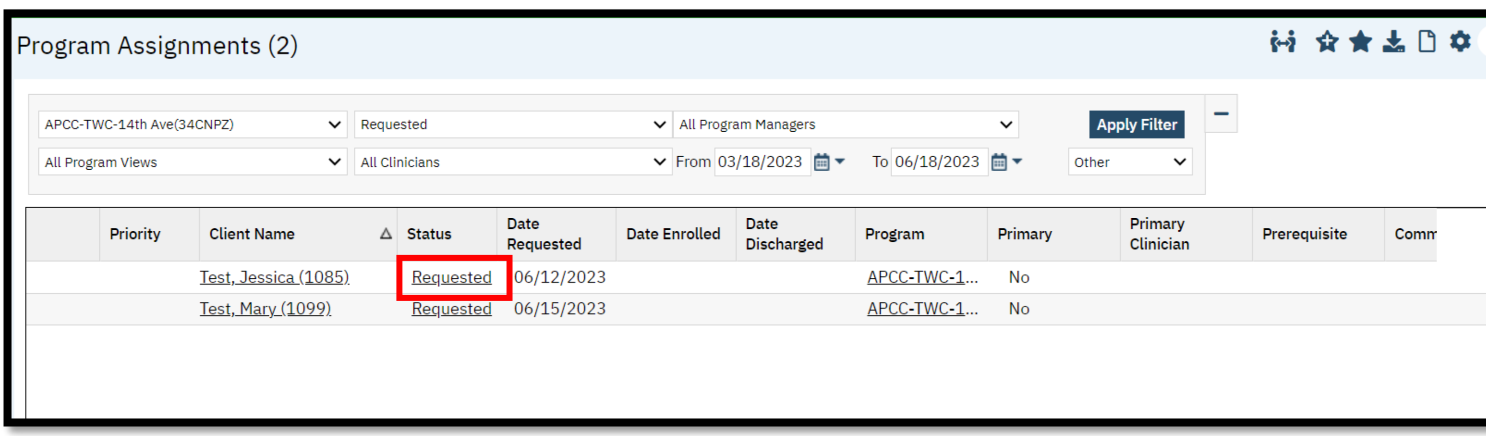
Inquiry for a New Client

There will be two types of inquiries for new clients.

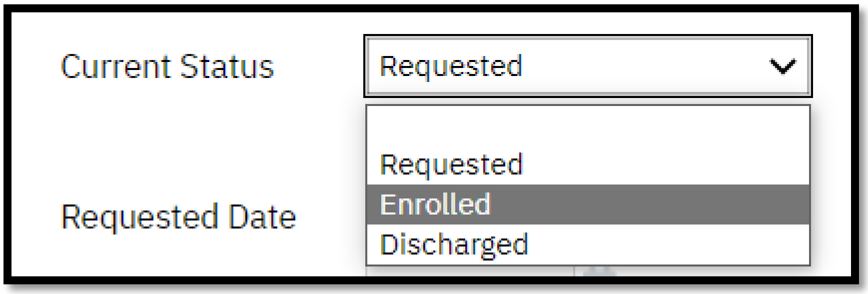
1. The client goes through Access or System of Care (SOC) and they refer them to your program. In this circumstance, the inquiry will be completed by Access or SOC. If the request is approved, a request for enrollment into your program will be sent.
2. The client comes directly to your program requesting services. In this circumstance, you are able to start the inquiry and assign it to a clinician at your agency to disposition. An inquiry is still required to be completed for all clients. Complete the disposition for the new client and enroll them into your agency if appropriate.

New Inquiries from Access or SOC

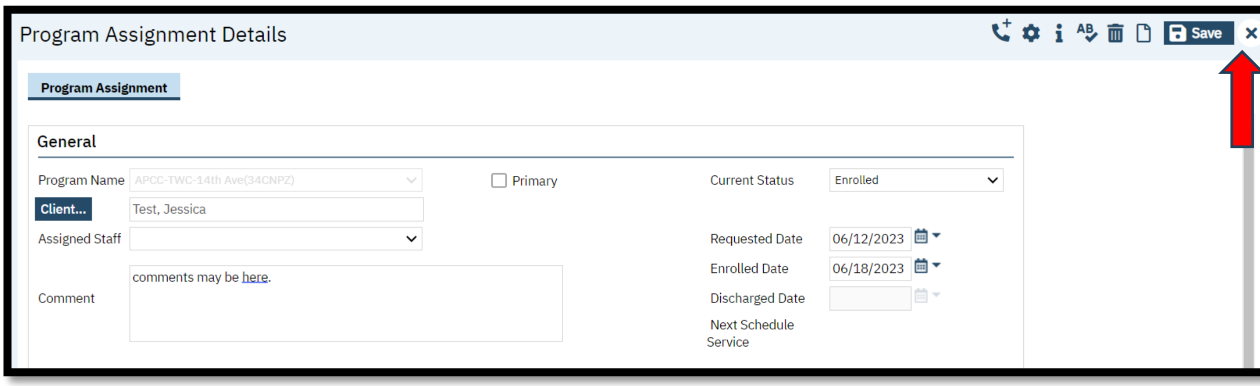
1. Search “Program Assignments (Program)” to open the Program Assignments list page.
2. Use your filters and search your program in “All Programs” and “Requested” for “All Statuses”, click Apply Filter. This will show all pending requests that have been sent from Access or SOC.
3. Click on the “Requested” hyperlink to open the screen.



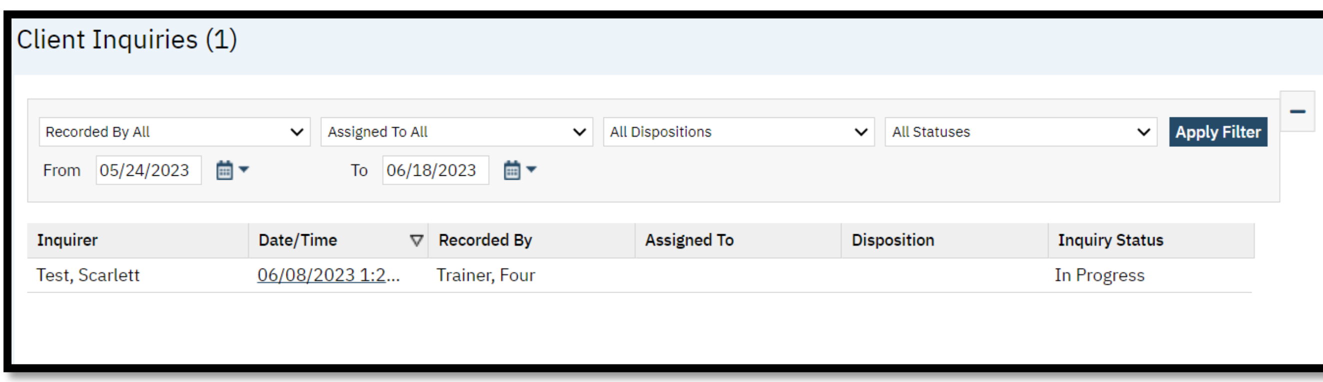
4. Once the page is open you can view any comments SOC or Access may have entered.
5. Switch the Current Status from “Requested” to “Enrolled”. Enter the “Enrolled” date.



6. Click “Save” & “Close” once complete.

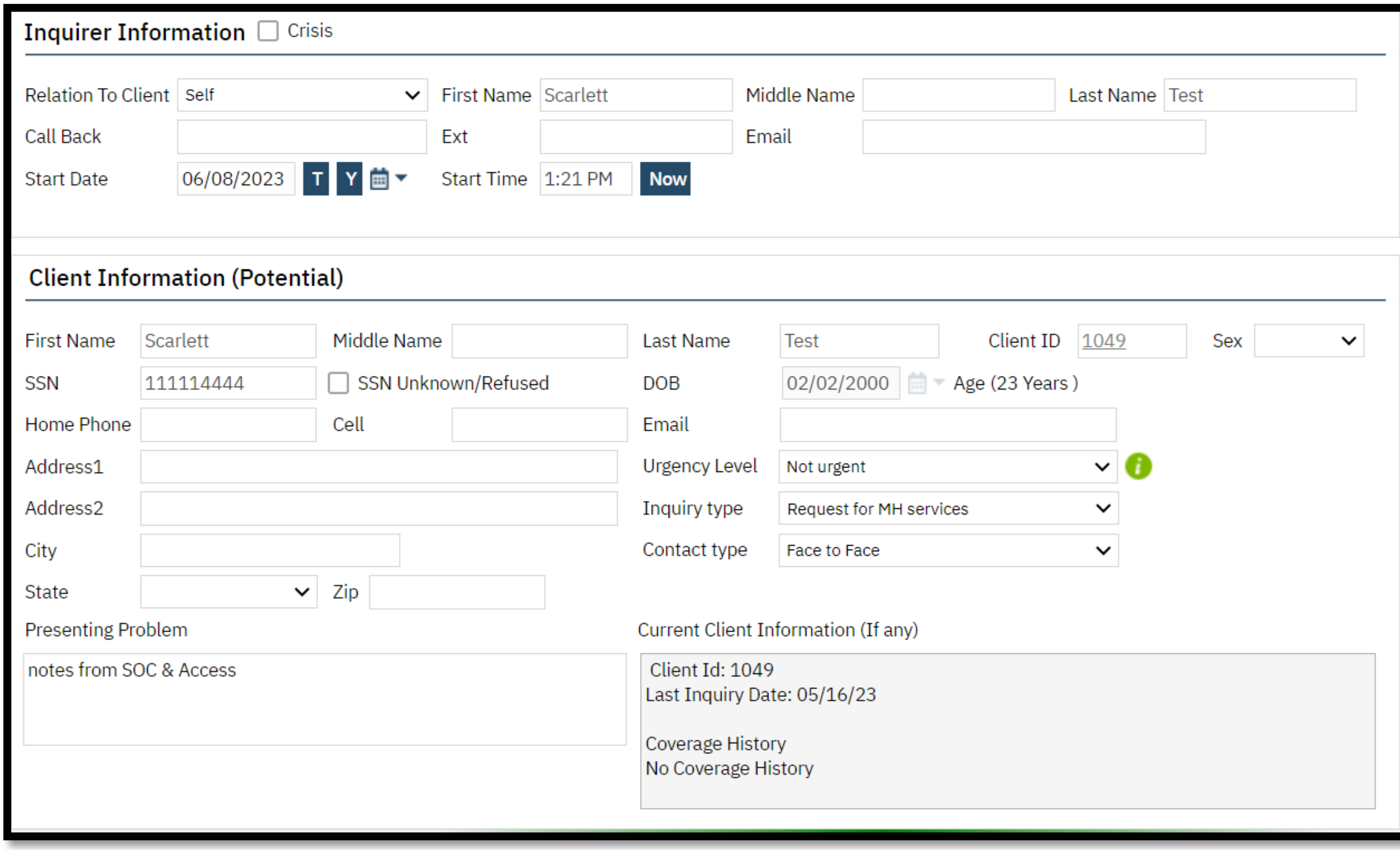


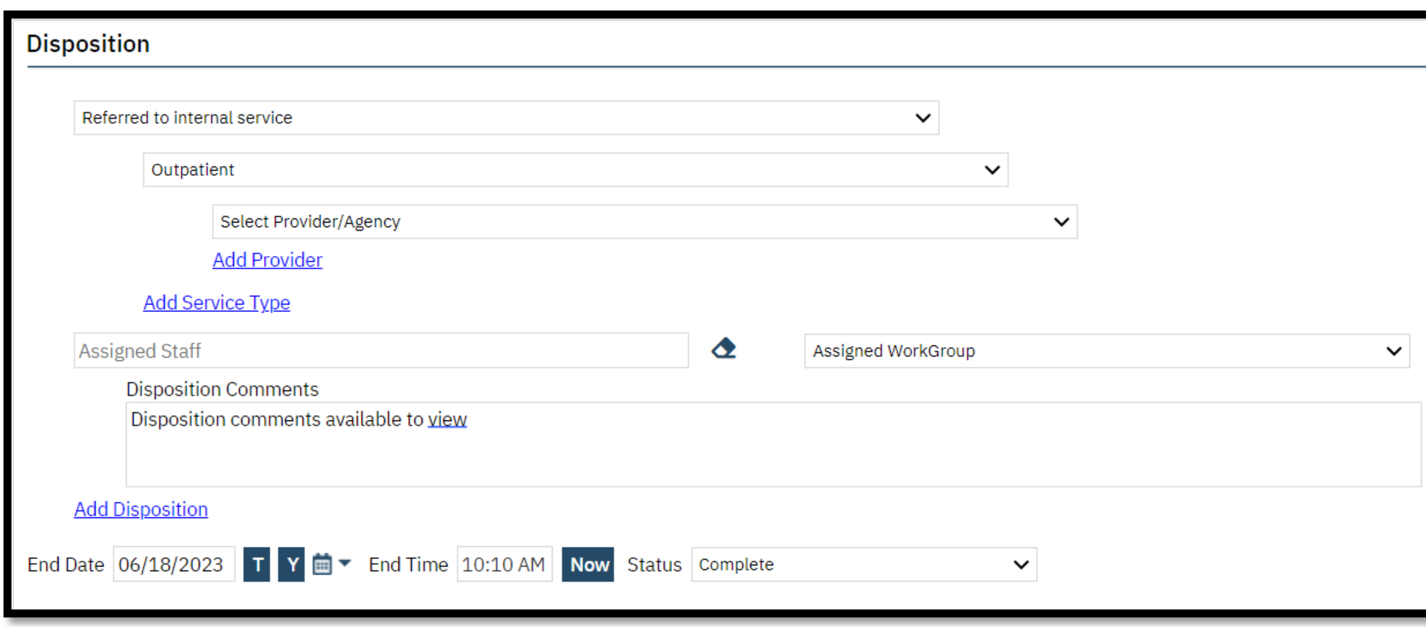
7. If you would like to see additional information regarding the inquiry you can go to Client Inquiries (Client), look up the new client and view the details of the inquiry. Please note, you may need to change the date range to view the information.



8. Click on the Date/Time hyperlink to open the inquiry.

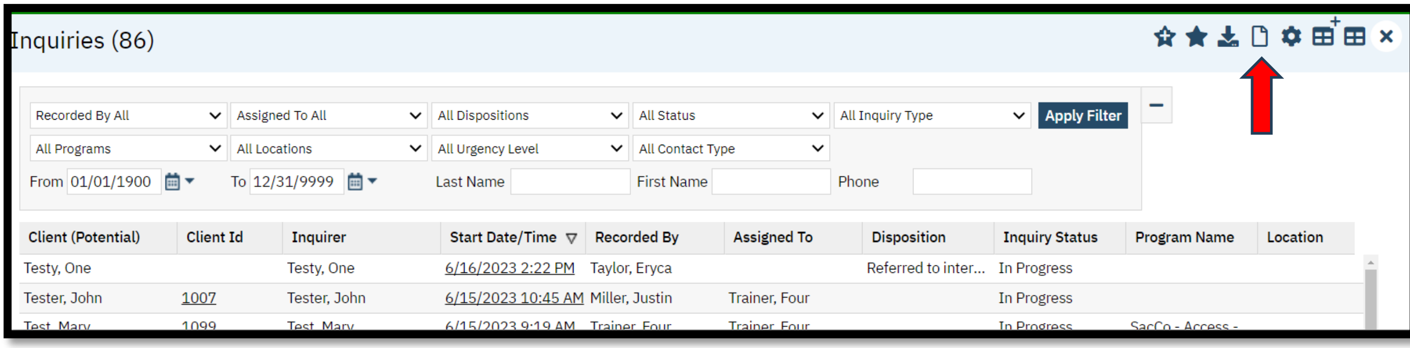
9. From here, you can view the details of inquiry entered by Access or SOC, including disposition comments.



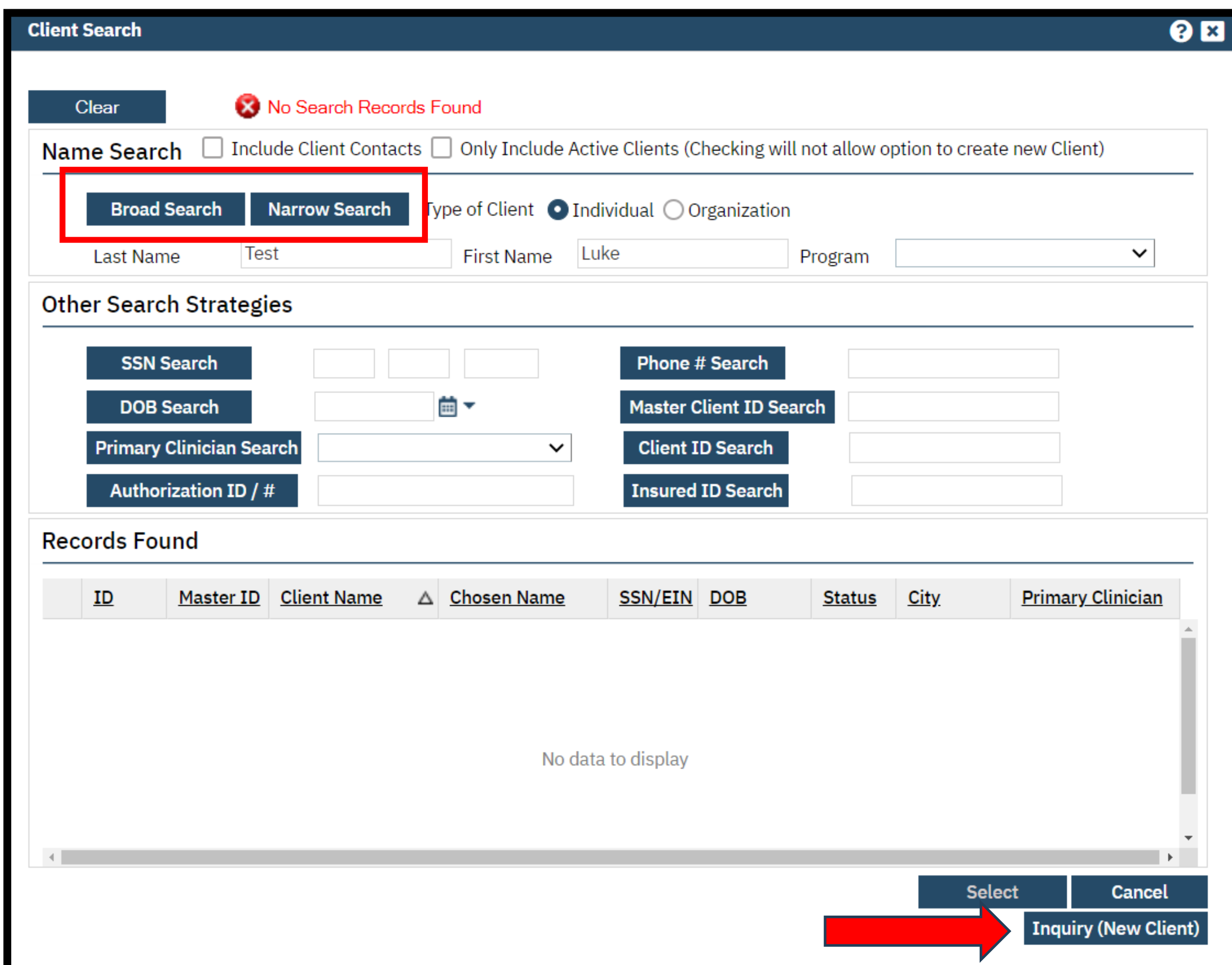


New Inquiries when the client comes directly to your program

1. Search “Inquiries (My Office)”. A list page of all inquiries will open. Select the “New” icon. Make sure you do not already have a client selected. If a client is already selected, the inquiry will open for that existing client.

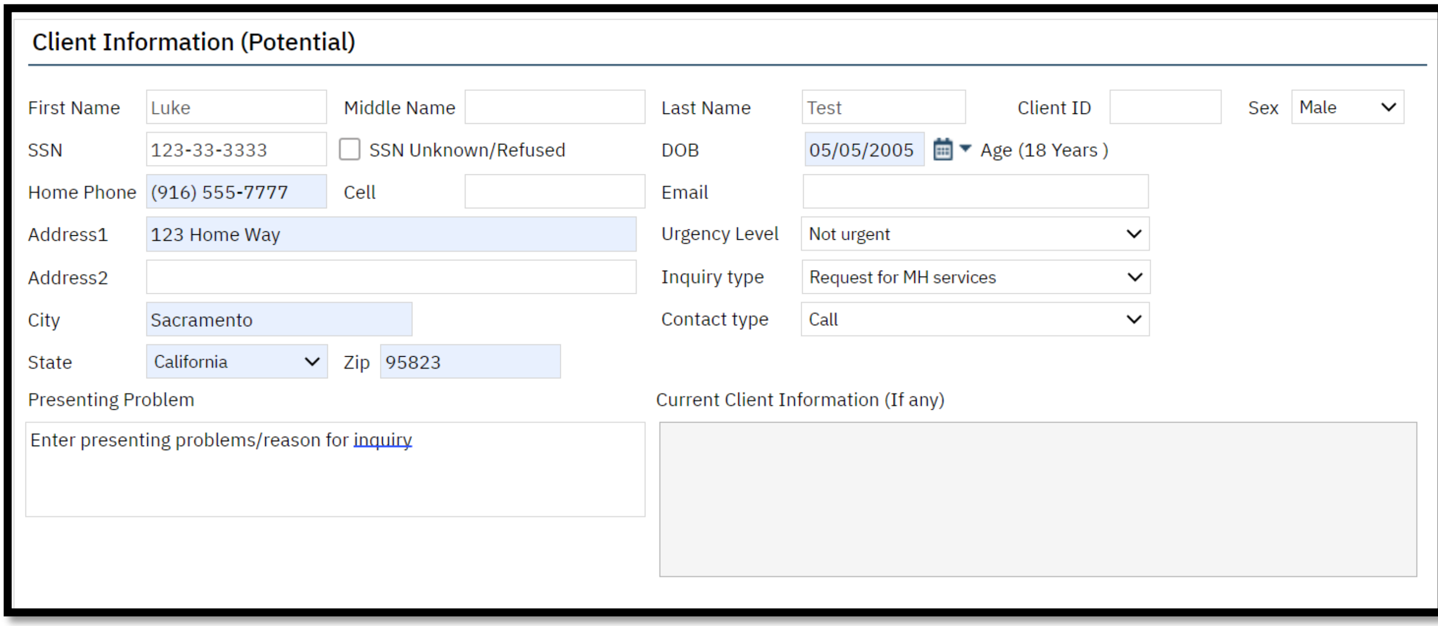


2. A client search box will open. Enter the potential clients last and first name. Click “Narrow Search” to specifically search that client. If they do not populate at the bottom, you can click “Broad Search” to search anyone with a similar name. If you still do not see the client, click “Inquiry (New Client)”.

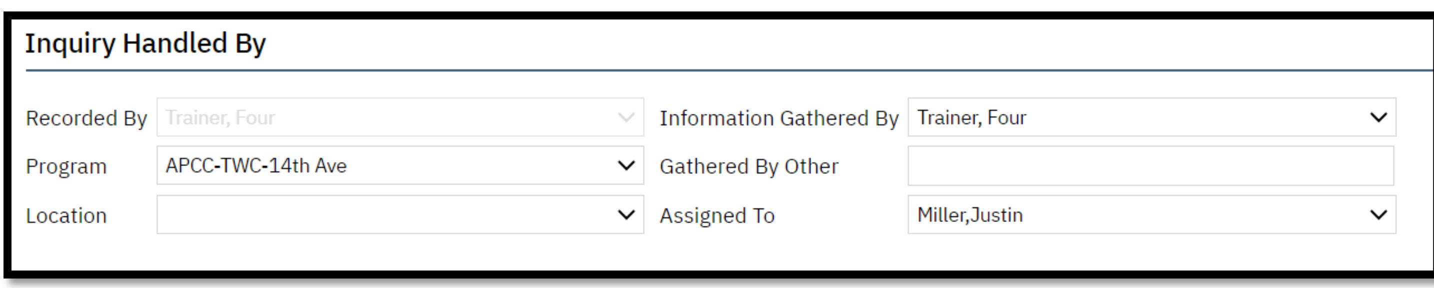


Updated 6/15/23

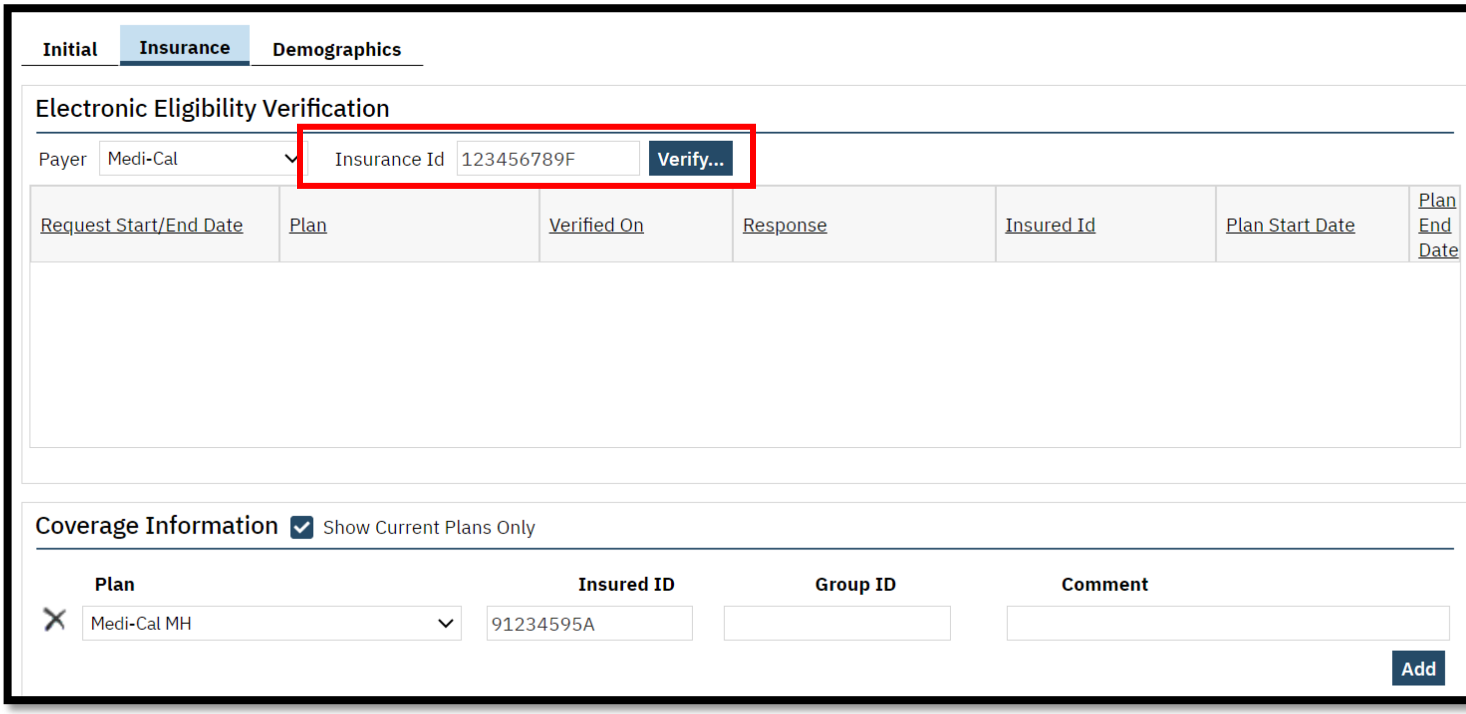
1. Fill in the Client Information section with information regarding that inquiry. Make sure to address all items below. For billing purposes, the Sex chosen on this screen must match the client's sex listed on the Medi-Cal website.



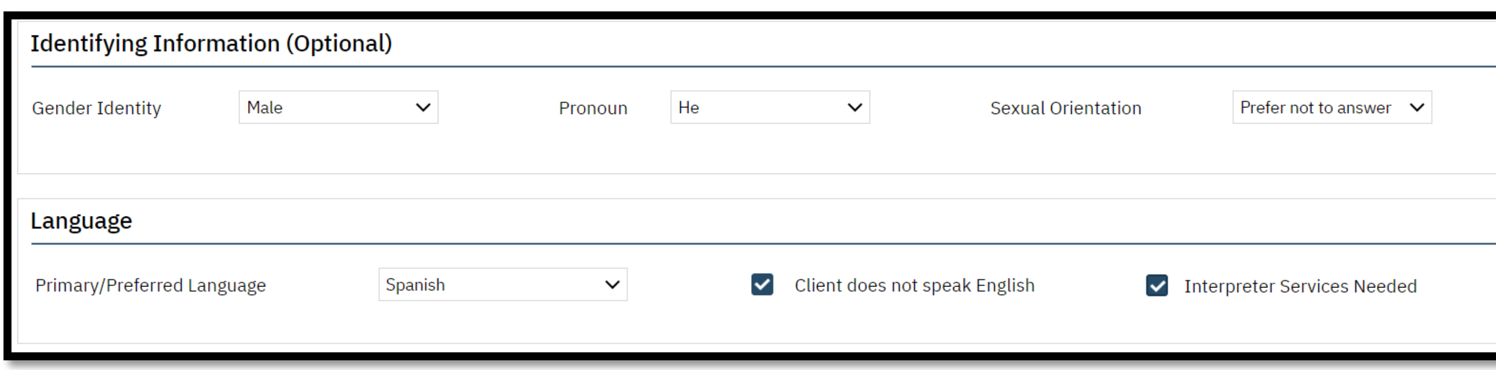
2. In the "Inquiry Handled By" section, select your program and assign the inquiry to a clinician at your agency. This will be an internal process for each agency to determine who will disposition inquiries.



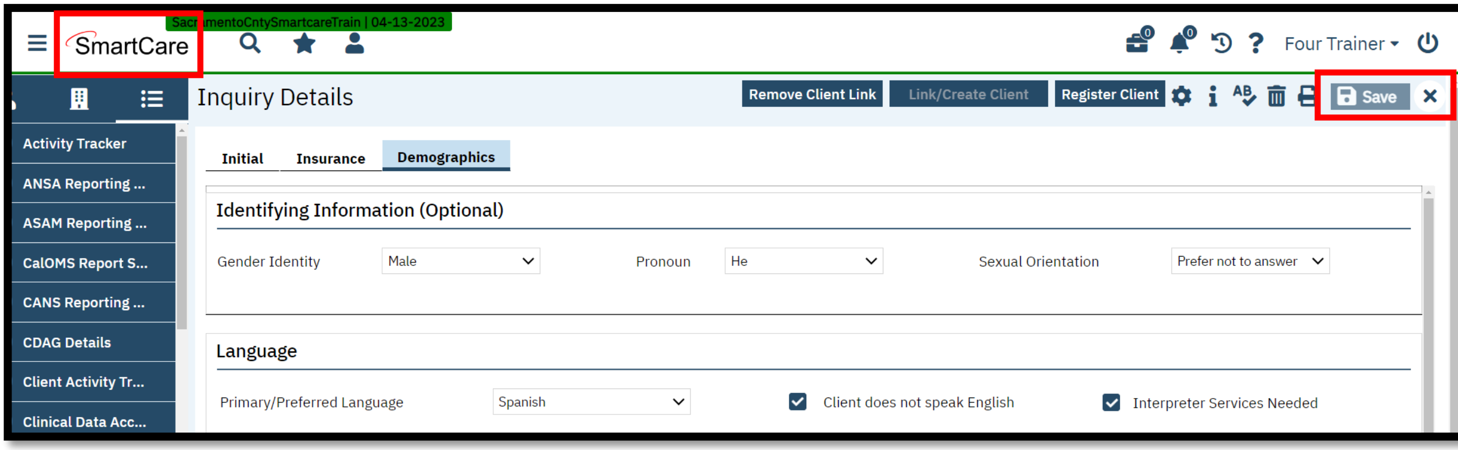
3. At the top of the screen there are two additional tabs, Insurance and Demographics. The Insurance tab will allow you to verify the clients Medi-Cal eligibility. Enter the CIN Number under Insurance ID and click verify. The "Coverage Information" will allow you to enter payors into the coverage section. If the client is enrolled, you will still need to go to the coverage screen to add the payors. Because of this, the bottom section is not required to be filled out at this time.



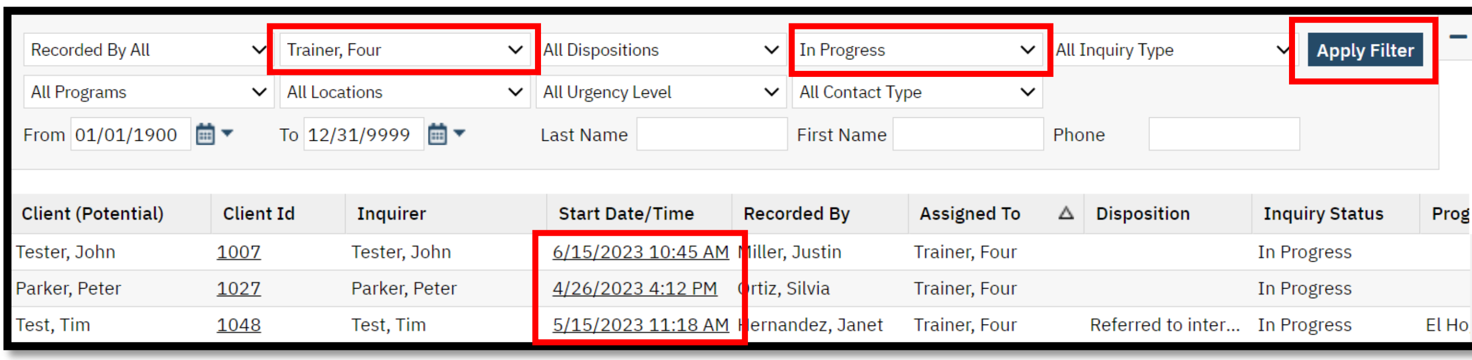
4. The Demographics tab is not required to be filled out in order to save the inquiry; however, we recommend entering at least the top two sections of the screen, "Identifying Information" and "Language". In these sections, you can enter the client's gender identity and pronouns as well as indicate if they need an interpreter. Use the Identifying Information field if the client's gender identity is different than their sex at birth.



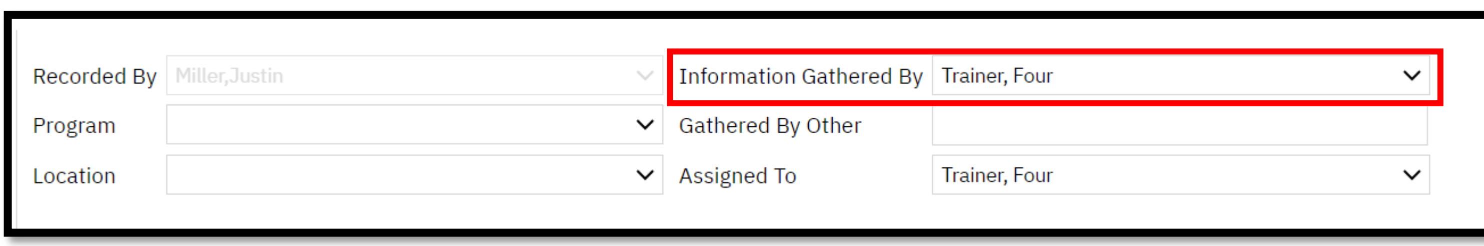
5. Once you have completed your inquiry, click the "Save" button at the top right. If you want to go back to the list page, click the X to close, or click the SmartCare button on the upper left to go back to the home screen.



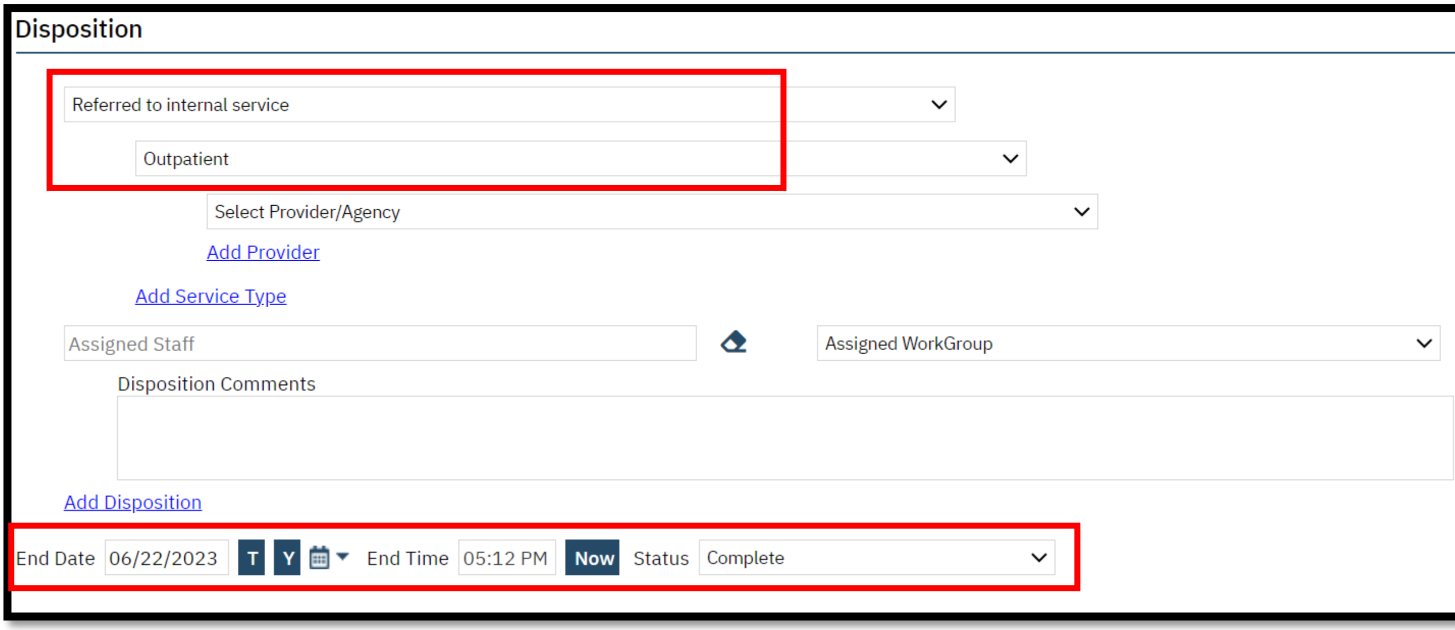
6. After the inquiry has been created, the assigned clinician can go into the inquiry and disposition after determining whether the client meets medical necessity. The clinician can search "Inquiries (My Office)" and set their filters to show inquiries that have been assigned to them and are still in progress. The clinician will select their name from the "Assigned to All" drop down and select "In Progress" under the "All Status" drop down. Click "Apply Filter". Click the "Start Date/Time" hyperlink to open the inquiry.



7. The clinician can select their name from the "Information Gathered by" drop-down.



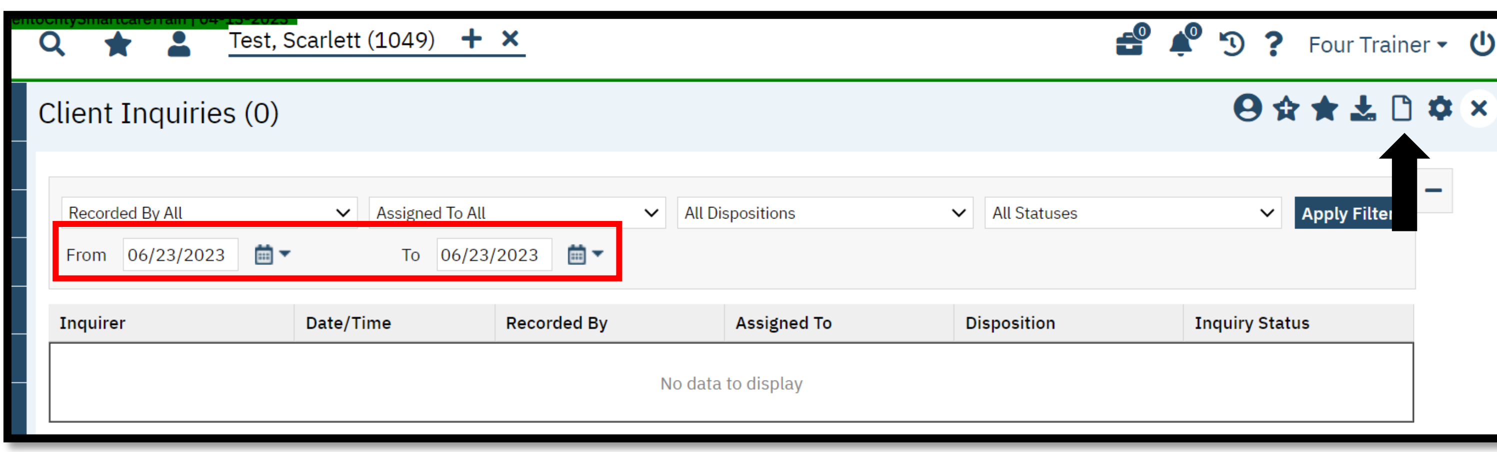
8. Under the Disposition section, select the disposition and service type. Enter the End date and time of your disposition and mark it as Complete. Save your changes.



Inquiries for an existing client

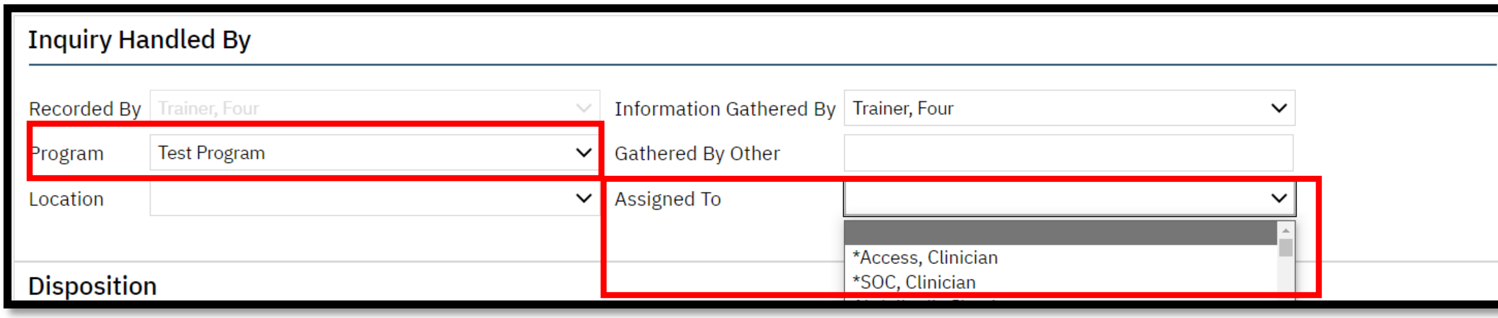
If your current client is needing TBS services, psych testing, or a transfer you should send an inquiry to Access or SOC for that existing client. Search for your client.

1. Search "Client Inquiries (Client)". You are able to view any previous inquiries entered for that client here. Please note, if you do not see any listed you may need to adjust the date range. To enter a new inquiry, click the New button.



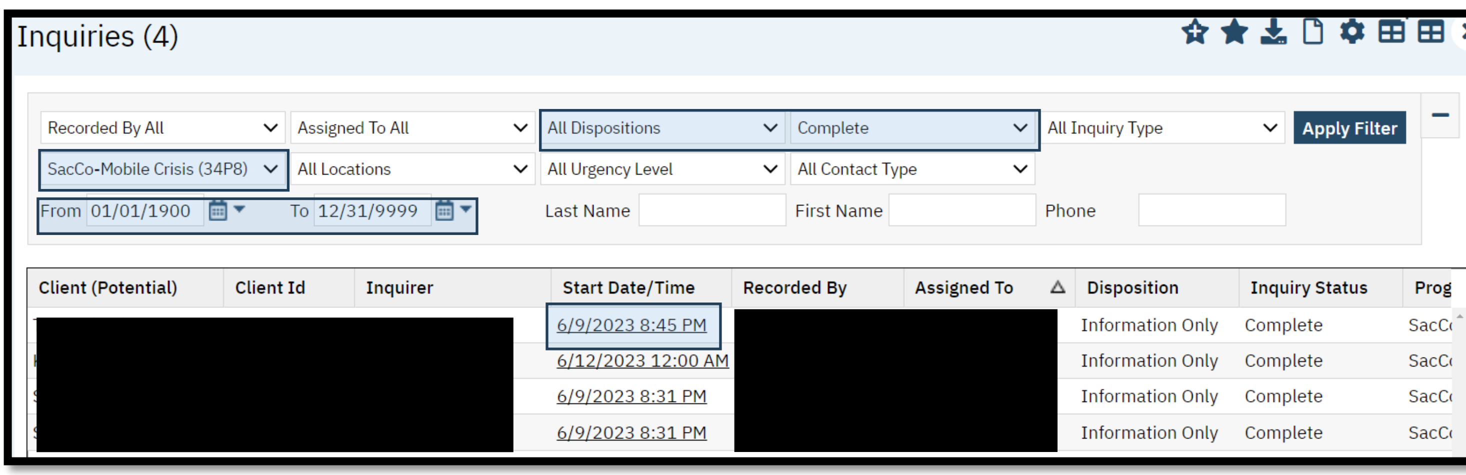
2. Enter the details of your inquiry as you did in the previous process. Make sure to specify in the comments what you are requesting. For example TBS services, lateral transfer, step up or step down, etc.

3. Under “Inquiry Handled By” select your program and under “Assigned To” select *Access, Clinician for a mental health request or *SOC, Clinician for a SUPT request. Save and close the inquiry once complete.



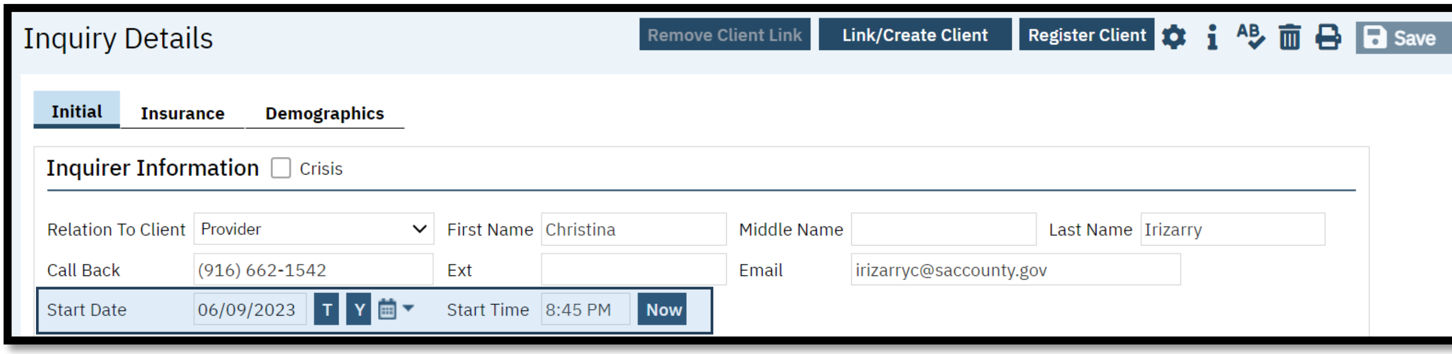
Viewing Dispositions

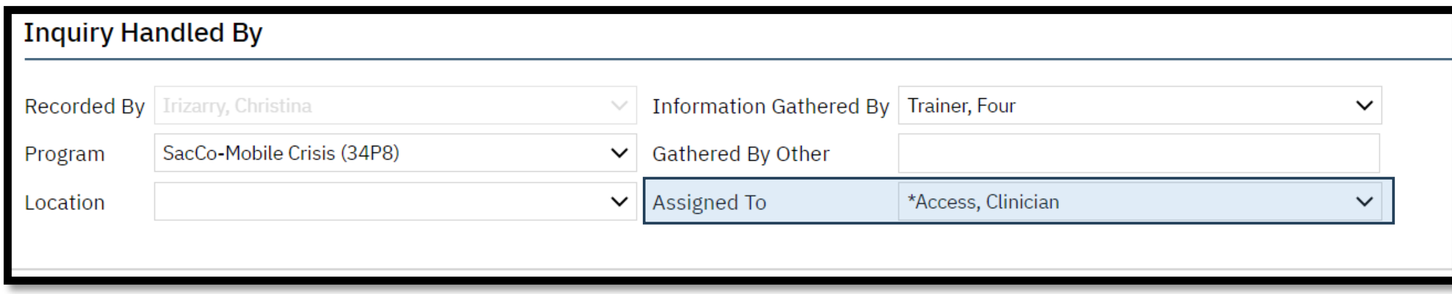
1. With no clients selected search “Inquiries (My Office)”
2. On the list page change your filters to show your program, all dispositions, the date range you want to view, and Complete. Click Apply Filter. This will show all completed dispositions. You can click on the hyperlink to view the details of that disposition.

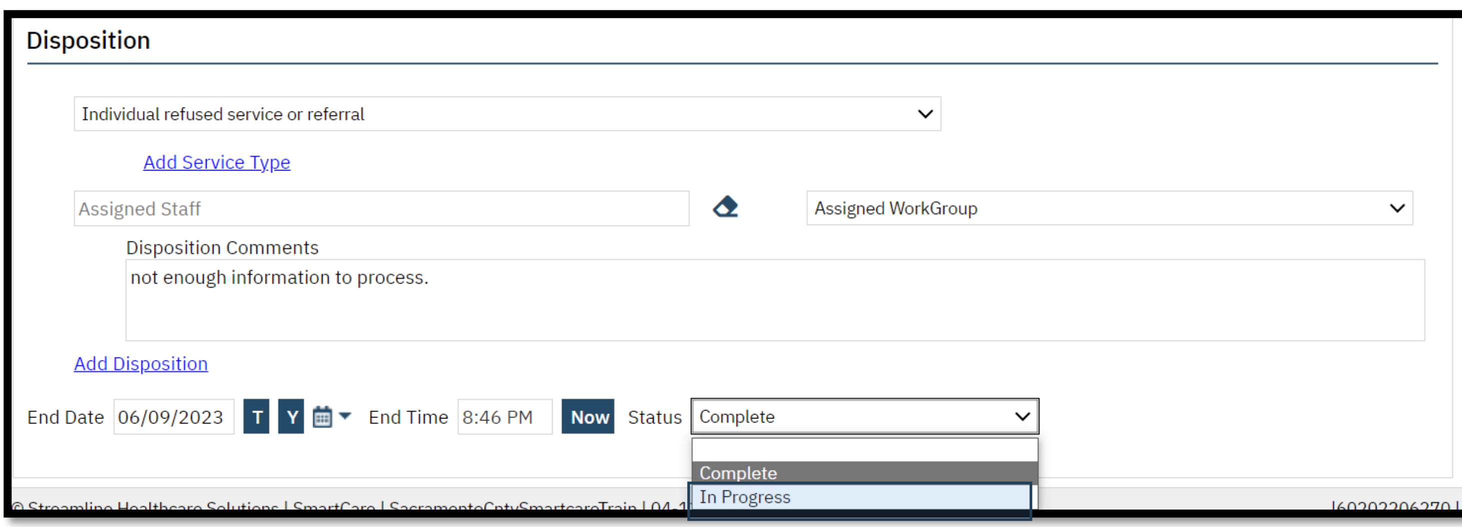


Editing Dispositions

1. If a mistake was made or more information needs to be added to the inquiry you can open the existing inquiry and make any necessary updates. If any updates are made, make sure to update the date/time of the inquiry. You'll also want to make sure it is still assigned to Access or SOC and that the status is showing as in process.



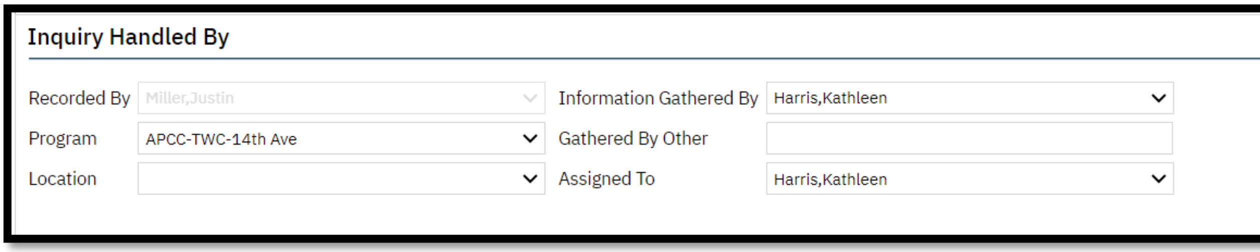




If an Inquiry does not have enough information entered, Access or System of Care may send it back to you for edits. In this case they will change the disposition to "Information Only". You can then follow the steps outlined above to update the inquiry.

Dispositioning an inquiry on behalf of a clinician

Admin staff are able to enter the disposition on behalf of the clinician. This may happen with agencies who use their own EHR and the clinical staff may not have access to SmartCare. For these inquiries you will follow the same process as outlined above. The only difference will be under the "Inquiry Handled By" section you will specify the clinician who gathered the information. In the example below, the person who recorded the inquiry (admin staff) is different from the person who gathered it (clinical Staff). If the clinician is not on the drop-down list you can manually enter their name in the "Gathered By Other" field right below.



Sending an Inquiry to a separate agency

If a client comes directly to your program and you are unable to enroll them (waitlist, medical necessity, etc.) you can create an inquiry for that client and assign it to someone from a different program. The other program will then be able to filter inquiries that were assigned to them. Things to keep in mind regarding this process.

- The inquiry will be created using the same steps outlined above.
- You are not assigning the inquiry to the program you are assigning it to a person, because of this you'll need to know the name of the person dispositioning inquiries at the program you are assigning to.
- The person it is assigned to can then filter inquiries that have been assigned to them in order to view and disposition.