SCAN & UPLOAD HOW-TO:

**** file size limit for uploading and scanning documents is 10Mbs regardless of # of pages ***

- **How to Scan a Document**
  URL: https://2023.calmhsa.org/how-to-scan-a-document-into-the-clients-record/
- **How to Upload a Document**
  URL: https://2023.calmhsa.org/how-to-upload-a-document-into-the-clients-record-without-a-scanner/
- **Situation: Person not enrolled**
  - Seeking a service/initializing: Ask our colleague who provided the document/s to enroll a person.
  - Not seeking a service: Let the sender know the PS is no longer enrolled with us, if the PS would like to return to our program/clinic for service, the PS will need to come in and re-enroll and, at that time, if we need the information, we will request. Discard delete the PHI info according to our protocols.

SmartCare Document Name	Use Case/Specific situation/Document
Alert – Scanned	Safety/Crisis Plan
	Documentation of threats, concerns, dangerous or serious situations
	Allergies or serious medical conditions
	HIV/aids information note to chart
Correspondence – Scanned	Letters/memos to/from persons served.
	School report card
	IEP/Individualized Education Program, Conner's scale, NICHQ (Vanderbilt) documents received from school.
Lab Orders ⓘ	Lab Orders
Labs ⓘ	Labs
Legal – Scanned	Advance Health-Care Directive
	Conservatorship
	Court Order (custody, guardianship)
	CPS Suspected Child Abuse Report (SCAR)
	5150
MAR Administration Report ⓘ	Medication Administration Record Report
Medications ⓘ	Prescription records
	Medications
	Consent for Medication
	JV-220, JV-223
	Injection records
	Medication education notes
	Medication instructions
	A.I.M.S.
Radiology/Diagnostic Images ⓘ	Radiology/Diagnostic Images
Radiology/Diagnostic Narrative Interpretations ⓘ	Radiology/Diagnostic Narrative Interpretations
Registration – Scanned	Registration report/eligibility
	Copies of financial/payor information
	Face sheets
	Consents for treatment, Email and Text Communication, Telehealth
	Acknowledgement of receipt of notice of PP
	Referrals or transfers including Notice of Presumptive

	Transition of Care Tool Transfer (AB-1299) ID's, Birth Certificate
Release of Information – Scanned	ROI, SSA-ROI Approvals, All ROI Disclosures *(Disclosures should be in one file if scanned in/uploaded in the system – do use the "Disclosures/Requests" in the system to track).*
Scanned Medical Record ⓘ	Assessment PHQ9, CANS, PSC-35, ASAM/SUD screening, ANSA, LOCUS, ASQ Crisis Assessment Psychological evaluation Medication progress note Nurse's progress notes STRTP Medication Review Progress notes Crisis Intervention progress note Plan of care/Physician's plan of care CFT-ICC/IHBS Medical Records from outside providers Medical Records from CSUs, PHFs, hospital for discharge follow-up (Exodus CSUs and PHF, Central Star PHF, Bakersfield hospitals)
Special programs – Scanned	Documents generated by programs such as Housing, Perinatal.
Summary of Care Scanned ⓘ	Do not use/ attach the uploads to this Document Name. The summary of care should be attached to the "Scanned Medical Record".
Vital Signs ⓘ	Vital Signs
NOABDs ⓘ	**This group was created by CalMHSA. Please attach the appropriate** NOABD documents to one of the NOABD document types. NOABD - Authorization Delay (Scanned) NOABD - Delivery System (Scanned) NOABD - Denial (Scanned) NOABD - Financial Liability (Scanned) NOABD - Grievance/Appeal Timeliness (Scanned) NOABD - Modification (Scanned) NOABD - Payment Denial (Scanned) NOABD - Termination (Scanned) NOABD - Timely Access (Scanned)

ⓘ = **Came with the system or** ⓘ **created by CalMHSA, cannot modify.**

TIPs: If we do not see a **program** in the drop-down, this could be due to that person has not been assigned a program/enrolled (pre-requisite). However, if that is not the case, this could be due to permission and please contact DBH IT. *** For SUD or the part 2 documents, **please be very sure to select the correct SUD program**. Each SUD program has its own CDAC (CDAC = what we can "see" in SmartCare) ***