# MENTAL HEALTH SMARTCARE LITE USER GUIDE

Note: Documents shown in GREEN can be found in the User Guide Supportive Documents folder.

| THINGS TO KNOW ABOUT SMARTCARE | | |
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| 1 | SmartCare System Setup Requirements | Refer to the following documents/files on what is needed to setup SmartCare.<br>1. SmartCare Software and Hardware Requirements<br>2. SigWeb Installation Guide – Version 1.7<br>3. DynamicWebTWAINHTML5Edition.zip |
| 2 | Adding a New SmartCare User | 1. Authorized Representative will complete the spreadsheet (the same one as before with Avatar) and send it the DBH staff analyst. A valid and correct **organization/work e-mail address is required** for new users. Please make sure this is correct.<br>• If needed, refer to the Current Avatar Access. This spreadsheet contains examples on how to complete the spreadsheet. Please note, although the information on the spreadsheet says "Avatar", this is still the same spreadsheet used to request for a new SmartCare user.<br>2. DBH IT will create the new account and notify the Authorized Representative after the account has been created.<br><br>Please note, **direct service provider who provides billable services** will also need to be credentialed by Managed Care. Upon completion, Managed Care will provide DBH IT with staff's licenses/certification to be added to the staff user profile. |
| 3 | Logging into SmartCare | Logging in to SmartCare |
| 4 | Password Reset | How to Reset Your Password |
| 5 | Basic Navigation | Home screen, widgets, chart view<br>• EHR Essentials Quick Guide<br>• Preferences<br>• Widgets<br>• Icons |
| 6 | Client Search | • How to Use the Client Search Window<br>• How to Use the Client Search Icon |
| 7 | List Pages | List Pages are called such as they list information. They are referred to as first level reports as they provide information and data. |
| 8 | Services Report | 1. Search for the "Services (My Office)" |

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| | | 2. Refer to List Pages on how to utilize this page<br>3. Report must run by program |
| 9 | Staff Setup | How to check staff setup:<br>• Search for "Fresno Staff Setup (My Office)"<br>• Enter name (you can only search one staff at a time)<br>• Click on "View Report"<br><br>You will be able to see what program, CDAG, and user role you are assigned to.<br>• CDAG: Stands for Clinical Data Access Group. It restricts what you can see in SmartCare to ensure HIPAA and 42CFR compliance. It is driven by the client signing a Coordinated Care Consent.<br>    o The Coordinated Care Consent grants the ability to share the client's data across all programs within SmartCare. If there is a consent on record, all data will be available (including historical documents and future appointments). If a consent is revoked, all data will be locked down (included historical documents and future appointments). DO NOT USE AT THIS TIME<br>• User Role: Your assigned user role will determine what type of access you will have in SmartCare. |
| 10 | Messages | Can be utilized to contact/send messages to other SmartCare users.<br>• How to Send a Message |
| 11 | Screens Vs. Documents | Understanding the difference between a screen and a document.<br>• Screens vs. Documents |
| 12 | Special Population | Refer to the News You Can Use (NYCU) on Special Populations in SmartCare on when to use the Special Population designation in SmartCare.<br>• How to Identify a Client as Katie A or Other Special Population |

| **THINGS TO COMPLETE IN SMARTCARE** | | |
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| 1 | Client Inquiry | The following functions may occur in the Client Inquiry form:<br>• Access Line Call Log<br>• New Client Creation<br>• Client Search<br>• Insurance verification (check Medi-Cal)<br>• Demographics |

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| 2 | Medi-Cal Screening and Transition of Care Tools | Refer to the Screening and Transition of Care Tools compliance bulletin and Policy and Procedure Guide (PPG) 2.1.14D to understand what the Medic-Cal Screening and Transition of Care tools are and when to complete them.<br><br>**Screening Tool:**<br>Adult: How to Complete the Adult Medi-Cal Screening Tool<br>Youth: How to Complete a Youth Medi-Cal Screening Tool<br><br>**Transition of Care Tool:**<br>How to Transfer the Client to the MCP |
| 3 | MH Non-Psychiatric SMHS Timeliness Record and MH Psychiatric SMHS Timeliness Record | The **MH Non-Psychiatric SMHS Timeliness Record** and the **MH Psychiatric Timeliness SMHS Record** will replace the **CSI Standalone Assessment** and the **Psychiatric Service Timeliness** forms effective January 15, 2024. These forms track how long it takes a person served to enter services. This data is used for state reporting requirements, and more importantly, program evaluation.<br><br>Refer to the User Guide MH Timeliness Record for further guidance on when the forms are required and how to complete them. |
| 4 | Client Service Information (CSI) Demographic Record or CSI Standalone Collection | The CSI Demographic Record, also known as the CSI Standalone Collection, should be completed for every client.<br>• How to Complete a CSI Demographic Record |
| 5 | Admitting and Discharging to a program | **Admitting**<br>Required for all person served admitted/enrolled to and/or receiving services from your program.<br>• How to Add the Client to Your Program<br><br>**Discharging**<br>Required for all person served no longer enrolled/receiving services from your program. If this step is not completed, person served will continue to be a part of the staff's caseload and will remain enrolled in your program in SmartCare.<br>• How to Close a Client to a Program |
| 6 | Notice of Adverse Benefit Determination (NOABD) | Must complete one of the following NOABDs when services are denied, reduced, discontinued, or not performed within the required timeframe for mental health services. https://2023.calmhsa.org/how-to-complete-a-noabd/<br>1. NOABD Delivery System & Denial Notice<br>2. NOABD Timely Access Notice<br>3. NOABD Termination Notice – Direct Service |

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| 7 | Child and Adolescent Needs and Strengths (CANS) Tool | Required for individuals ages 6-20 at intake and every 6 months until discharge.<br>• Child and Adolescent Needs and Strengths (CANS) Tool |
| 8 | Pediatric Symptoms Checklist, PSC, or PSC-35 | Required for individual ages 3-18 at intake and every 6 months until discharge.<br>• Pediatric Symptoms Checklist |
| 9 | Scanning Documents | Documents that should be scan into SmartCare includes but are not limited to:<br>• Legal documentation (custody order, minutes order, reports to the courts, etc.)<br>• Hospital documentation (5150, discharge paperwork, etc.)<br>• NOABDs<br><br>Refer to the following if needed:<br>• How to Scan a Document into the Client Record<br>• How to Upload a Document into the Client Record Without a Scanner<br>• How to view client's documents:<br>    o Search for "Documents (Client)"<br>    o Select client info<br>    o Select "Include External Documents" box<br>    o Document name with indicate "Scanned" |
| 10 | Updating Client Information | The Client Information should be updated whenever there is a change to the client's contact information, demographic, etc.<br>• How to update the Client Information:<br>    o Search for the client's name or client ID<br>    o Open the "Client Information" screen<br>    o Update the appropriate information<br>    o Click the "Save" button |
| 11 | Client Flags | How do I Create a Flag to Alert Treatment Team Members to Important Client Information<br><br>DBH Recommended Flags:<br><br>    o Client's parent/guardian does not speak English<br>    o Client also has private insurance<br>        ▪ Use in cases of any other health coverage<br>    o Court Order |

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| | | ○ Deceased<br>○ Do NOT disclose info/SB24 in place<br>○ Minor consent<br>○ Needs to see AI<br>○ Staff safety concern<br>  ▪ Use in cases where safety of staff may be compromised; be specific<br>○ *Receptionist Flags:*<br>  ▪ Two missed appointments<br>  ▪ Scheduling notes<br>○ *Special Teams Flags:*<br>  ▪ Katie A Sub Class Person<br>  ▪ LPS Conservatorship<br>  ▪ Presumptive Transfer<br>  ▪ Temporary Conservatorship<br>  ▪ Early Intervention Services<br>○ *Medical Team Flags:*<br>  ▪ AIMS update<br>  ▪ Biennial re-evaluation<br>  ▪ Treatment plan new/update |
| 12 | Problem List | • How to Add a Problem to the Problem List<br>• How to Remove a Problem that has been Resolved |
| 13 | Correction of Errors<br>“ My Report Errors (My Office)” | • How to Report an Error that Needs to be Corrected<br>• How to Report an Individual Service Note Error<br>• How to Report a Group Service Note Error<br>• How to Review Reported Errors<br><br>• “How-to” TBD<br>• SUD: DBHadpbusinessoffice@fresnocountyca.gov<br>• MH: DBHmentalhealthcorrections@fresnocountyca.gov |
| 14 | Client Referrals | Must be completed when referring an individual to another SMHS provider. Refer to the SmartCare Referral Workflow on how to complete a referral in SmartCare. |

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| 15 | Request to Block a Chart | Request to block a chart if:<br>• Client is a current employee of the program/organization<br>• Client is a current volunteer of program/organization<br>• Client currently has relatives or friends/acquaintances working for program/organization<br>• Client is a "VIP"/high-profile person within the community/state<br>• Client is involved in a high-profile legal case<br>• Client has potential or actual litigation against DBH, County, or program/organization<br>• Client requests restricted access to medical records<br><br>Send request to DBH Medical Records:<br>**Child:** dbhmedicalrecordschild@fresnocountyca.gov<br>**Adult:** dbhmedicalrecordsadult@fresnocountyca.gov |
| BILLING RELATED ITEMS | | |
| 1 | Batch Submit Service Data | The Service Import contains the following information below. (Scroll down the Service Import document, the first few pages are blank.)<br>• How do I complete the template?<br>• How do I view the batch service uploads screen?<br>• How do I upload the file?<br>• How do I review the file?<br>• How do I correct errors?<br>• How do I view services created from the nightly service job?<br><br>Use the **Batch Service Upload Template** to enter batch services to be uploaded into SmartCare. |
| 2 | Direct Service Entry (New Service Note) | • How to Complete a Direct Service Entry<br>• How to Attach a Document to a Service Note |
| 3 | Diagnosis | • How to Add a Diagnosis<br>• How to Delete a Diagnosis<br>• How to Modify and/or re-order a diagnosis |
| 4 | Client Account | • How to Get to the Client Account Screen<br>• Client Account Overview Tab<br>• How to View Client Fee Records |

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| 5 | Perinatal Clients | If the client discloses they are pregnant, clinical staff must add the pregnancy to the problem list. This applies to both Batch Service Upload or Direct Service Entry.<br>• Refer to the Problem List-Perinatal document on how to add the pregnancy to the problem list.<br>• If needed, refer to the following:<br>  o How to Add a Problem to the Problem List<br>  o How to Remove a Problem that has been Resolved |

## TECHNICAL ASSISTANCE

1. Identify and create expert users on your team.
2. If your team does not know the answer, refer to your assigned DBH Contract URS

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| Medical Records | DBH Medical Records Child: dbhmedicalrecordschild@fresnocountyca.gov<br>DBH Medical Records Adult: dbhmedicalrecordsadult@fresnocountyca.gov |
| Technology Questions | Contact your staff analyst to complete a fresh service ticket to DBH's IT staff. |
| Clinical Questions | DBHQualityImprovement@fresnocountyca.gov |
| Admitting Questions | DBHOperationsAITEAM@fresnocountyca.gov |
| Billing Questions | Contact your staff analyst |