SmartCare SUD Provider Workflow

What is it Called	Step by Step Directions/Video		Pro Tip
SmartCare Basics: Logging in to SmartCare	User Login Process	Changing Your Password: https://2023.calmhsa.org/changing-your-password/ Setting up Your Security Questions: https://2023.calmhsa.org/setting-up-your-security-questions/ Multi-Factor Authentication: https://2023.calmhsa.org/subsequent-logins/	
	Login Help	How to Recover Your Username: https://2023.calmhsa.org/how-to-recover-your-username/ How to Reset Your Password: https://2023.calmhsa.org/how-to-reset-your-password/	If you lock yourself from SmartCare, email your Staff Analyst for them to complete a Fresh service ticket.
Review your Programs and Roles	Staff Programs Staff Roles and Permissions 2	Use Search Icon	If you work in multiple programs, you will be assigned multiple CDAGs. Staff Programs- Will list the staff that have been assigned to specific program Staff Roles and Permissions 2 will list the User Roles you are assigned, the screens/documents you are granted access too or denied. Double check filters to ensure the all the information is pulled.
Look Up a Client/Enter request for service	Inquiries (My Office)	How do I document a request for services received via the Access Line? - 2023 CalMHSA	You will need to search by Name, DOB, and SSN before you can create a new client in the system This will also be the place you can check eligibility and complete demographic information

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	Client Search	How to use the client Search Icon: https://2023.calmhsa.org/how-to-use-the-client-search-icon/	Type the first three letters and a list of names will appear if the client is in the system. If you add a comma after the last name and begin typing the first name this will generate names. If you don't find a client in the system complete an Inquiry.
	Client Information	Search "Client Information" with a client's chart open Information can be entered in the following tabs; General Information, Aliases, Demographics, , Contacts, Family, External Referral. You are also able to view the following tabs: Financial, Release of Information Log	This Screen allows you to enter/update client's information such as address changes, phone numbers, parent/guardian, etc
Admit Client to Your Program	Client Programs (Client)	[How to Add the Client to Your Program](#)	Click the icon that looks like this  Do not put an Assigned Staff
Coverage Plans and Real Time Eligibility Checks	Coverage (Client)	Adding and change coverage plans: https://2023.calmhsa.org/how-to-add-plans/ Real time Medi-Cal eligibility checks: https://2023.calmhsa.org/how-to-run-real-time-eligibility-270-271-screen/	There are different screens you can add Coverage Information: "Coverage(Client)" and "Inquiry form" Real time eligibility checks only provide Medi-Cal information. It is still the program's responsibility to check other health care coverage and maintain appropriate documentation in the client file.
Privacy and Consents in SmartCare	Consents	How to complete Consent forms: https://2023.calmhsa.org/how-to-complete-a-consent/ How to Revoke Consent: https://2023.calmhsa.org/how-to-document-a-revoked-consent/ How to View What Consents a Client has Signed:	There are multiple Consent forms in SmartCare including • Consent to Treat (Client) • Consent for Telehealth (Client) • Consent for Email Communication (Client) • Consent for Text Communication (Client) Co-Signing: • SmartCare automatically makes the client a Co-Signer

		https://2023.calmhsa.org/how-to-view-what-consents-a-client-has-signed/	• Minor Consent, Conservatorship, and Guardians you will need to complete setting individuals to Contacts on the Client Information screen for the appropriate person to added to as a co-signer • Options to sign: Signature Pad, Mouse/Touchpad, Client Signed Paper Document, and verbally Agreed Over Phone
	Checklist to Determine Minor's Ability to Consent to SUD Treatment Consent for Minor	No equivalent form in Smartcare Substance Use Disorder Providers - County of Fresno (fresnocountyca.gov) Minor Consent, Conservatorship, and Guardians: Minor Consent, Conservatorship, and Guardians - 2023 CalMHSA	• Refer to Scan/Upload to SmartCare below • Providers can complete the form found on the SUD website and then upload a copy • This is a letter and must be completed by an LPHA.
	Release of Information (Client)	How to Document a Release of Information(Authorization to Disclose Confidential Information): https://2023.calmhsa.org/how-to-document-a-release-of-information-authorization-to-disclose-confidential-information/ How to Revoke a Standard Release of Information/Authorization to Disclose Information: https://2023.calmhsa.org/how-to-revoke-a-standard-release-of-information-authorization-to-disclose-information/ How to View What Disclosure Authorizations (ROI the client has signed: https://2023.calmhsa.org/how-to-determine-what-disclosure-authorizations-release-of-information-the-	

		client-has-signed/	
	Coordinated Care Consent (Client) (DO NOT USE AT THIS TIME)	How to Complete a Coordination Care Consent: https://2023.calmhsa.org/how-do-i-complete-a-coordinated-care-consent/ How to Revoke Coordinated Care Consent: https://2023.calmhsa.org/what-do-i-do-if-the-client-wants-to-revoke-their-coordinated-care-consent/ How to Determine if the Client has Signed a Coordinated Care Consent: https://2023.calmhsa.org/how-to-determine-if-the-client-has-signed-a-coordinated-care-consent/	By default, SmartCare enforces privacy regulations, including HIPAA and 42 CFR. This means that people working in mental health programs are not able to see any of the client's treatment information for substance use programs and vice versa. This limitation is enforced by each user's CDAG. In essence, there is a wall between CDAGs. When a client signs the Coordinated Care Consent, this wall is removed. Users will be able to see all the client's treatment information, regardless of their CDAG. This includes historical information and future appointments. You'll still be required to select your program when creating a new document. This is to ensure that all documents are appropriately sorted in case the client revokes their consent, as is their right.
Calendar Management	Staff Calendar (My Office)	Basic Navigation of the Staff Calendar: https://2023.calmhsa.org/basic-navigation-of-the-staff-calendar/ How to Create an Appointment from Your Calendar: https://2023.calmhsa.org/how-to-create-an-appointment-from-your-calendar/ How to schedule Non-Client Time on Your Calendar: https://2023.calmhsa.org/how-to-schedule-non-client-time-on-your-calendar/	
	Reception Calendar	How to Schedule an Appointment: https://2023.calmhsa.org/how-to-schedule-an-appointment/ Reception how to view/check in a client:	

		https://2023.calmhsa.org/reception-view/ How to Schedule a Follow up Appointment: https://2023.calmhsa.org/how-to-schedule-a-follow-up-appointment/	
Forms Needed in Client's Chart (Not in SmartCare: Refer to Scan/Upload to SmartCare)	Admission Agreement	No equivalent form in SmartCare. Providers should continue to use their own forms or the Admission Agreement found on the SUD website and upload completed/signed forms into Smartcare. Substance Use Disorder Providers - County of Fresno (fresnocountyca.gov)	SmartCare will not be building a standard admission agreement Providers should continue to use their own admission agreements or the one that is provided on the SUD website
	Health Questionnaire	No equivalent form in Smartcare. Providers should continue to use the health questionnaire form (DHCS 5103) and upload completed/signed forms into Smartcare. Substance Use Disorder Providers - County of Fresno (fresnocountyca.gov)	• Smartcare will not be building a Health Questionnaire • Providers should continue to use the DHCS 5103 Health Questionnaire and Initial Screening form found on the SUD website and upload the form into Smartcare. • DHCS 5103 may need to be added as a document to be scanned in on the drop down
	Member Handbook Acknowledgement Form	No equivalent form in Smartcare Substance Use Disorder Providers - County of Fresno (fresnocountyca.gov)	• Providers can complete the form outside of Smartcare and then upload a copy. • The form is also included in the Admission Agreement form found on the SUD website.
	NOABDs	Fresno County forms: https://www.fresnocountyca.gov/Departments/Behavioral-Health/Providers/Contract-Provider-Resources/Substance-Use-Disorder-Providers • NOABD Denial Notice • NOABD Discharge and Level of Care Transition • NOABD Financial Liability Notice • NOABD Termination Notice • NOABD Timely Access Notice	• Smartcare versions are compliant with DHCS requirements Must print and send to person served along with language tag lines, Non Discrimination, and rights handouts.
	BQuIP-SUD Screening	BQUIP Screening Tool	A progress note needs to be completed to capture that service time for billing purposes

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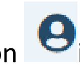
SmartCare Screening and Assessment		How to Complete a BQuIP SUD Screening Tool - 2023 CalMHSA	A Diagnosis Document (Client) is required prior to completing a Service note for billing.
	Fresno SUD ASAM (Not in SmartCare)	Use the "Fresno County SUD Assessment" or the "Fresno County SUD Withdrawal Management Assessment" found the on the SUD Website and upload completed/signed document into SmartCare There is a "Fresno County SUD Updated Assessment" and should be completed when clinically appropriate and required for Residential reauthorizations. https://www.fresnocountyca.gov/Departments/Behavioral-Health/Providers/Contract-Provider-Resources/Substance-Use-Disorder-Providers	• A progress note needs to be completed to capture that service time for billing purposes • Any of the 11 impairments identified in the "Substance Use Disorder Criteria (DSM-5)" section should be supported by individualized details captured by various questions throughout the assessment. • Substance Use Counselors and LPHAs should make sure to stay within their scope of practice when determining the diagnosis. • If the ASAM Assessment is done over several days, a progress note is needed for each day to capture the billable time • To meet the requirement of attaining a physical within 12 months, include this in a progress note of the Assessment.
CalOMS	CalOMS Admission (Client)	How to Complete a CalOMS Admission - 2023 CalMHSA	• Use the CalOMS Admission form for transfers as well. Make sure to select "Transfer or Change in Service" from the appropriate drop down menu.
	CalOMS Update/Discharge (Client)	How to Complete a CalOMS Discharge	CalOMS Update and Discharge is the same form
Enter Timeliness Data	DMC-ODS Outpatient/Opioid Timeliness Record	Search for DMC-ODS Outpatient/Opioid Timeliness Record Search/Select client Enter dates/data into appropriate fields	NTP-OTP programs should use the DMC-ODS Opioid Timeliness Record. Any other level of care should use the DMC-ODS Outpatient Timeliness Record
Medical Necessity Determination	Diagnosis Document (Client)	How to Add a Diagnosis How to Delete a Diagnosis How to Modify and/or re-order a diagnosis	• A Progress Note for medical necessity determination will need to be completed. ○ For Outpatient Programs only select procedure code Review of Hospital Records.

			Residential programs will select procedure code: Client Non-Billable Srvc Must Document • Star the frequently used diagnosis • LPHAs can use the Z03.89 code during the assessment period. • Non-LPHAs (counselors, case managers, etc.) cannot complete the diagnosis document as it is out of their scope. • You will need to have a diagnosis either on a diagnosis document or the diagnosis tab in the note to sign a service note/group note
Problem List	Client Clinical Problems (Client)	https://2023.calmhsa.org/how-to-add-a-problem-to-the-problem-list/	• Any staff member, or person served, is able to add or remove problems to the client clinical problems list. • There is no place on the problem list to identify who reported the problem, but you can identify that in a progress note. • A diagnosis is necessary to add a problem to the problem list, but any staff member is able to add/remove from the list. The diagnosis can be determined through client self-reporting or direct contact with another treatment provider. • **Perinatal clients** will need to have the SNOMED code for Pregnancy on Problem List; 248985009. Description Name: Presentation of pregnancy(finding)
Treatment Plan		DHCS no longer requires a treatment plan for outpatient, residential, or withdrawal management programs. Refer to your program regarding requirements from other entities.	• Providers can enter treatment plans in a progress note. • Tx plans are necessary for NTPs.
Add a Client to your Caseload/Look up your caseload	Treatment Team (Client)	This form will allow you to add a client to your caseload	• Select the appropriate role ex. Clinician, Counselor or Peer Support Specialist • You can add an External person to the client's treatment plan including a caregiver/family member/PCP

			• You can also access Treatment Team in Smartview by clicking the following icon  in the Client's dashboard. • To remove a client Input an End Date and unclick the Active Check box
	Caseload (My Office)	This List Page will display selected staff member's caseload.	• It list the clients that have been seen and a note has been written for them.

Notes	Service Note (Client)	<u>Individual Progress Note:</u>
		
		Scheduled appointment: https://2023.calmhsa.org/how-to-write-a-progress-note-for-a-scheduled-service/
		
		Unscheduled appointment: https://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduled-service/
		
		Document a No Show: [How to Document a No-Show Appointment - 2023 CalMHSA]()
		
		Edit a note: https://2023.calmhsa.org/how-to-amend-a-note/
		
		How to Correct an Error for Individual Note when they have gone through billing process:
		
		https://2023.calmhsa.org/how-to-report-an-individual-service-note-error/
		
		How to Review an Error that has been reported: https://2023.calmhsa.org/how-to-review-reported-errors/
			• Available procedures are based on the staff credentials (AOD, LPHA, MD).
			• A progress note must be completed for each individual or group counseling service provided. (Intake, Assessment, Care Plan, etc.) and the progress note shall provide sufficient detail to support the service code selected.
			• Each Service Note (progress note) shall include the following:
			    • A brief description of how the service addressed the PS behavioral health needs (e.g., symptom, condition, diagnosis, and/or risk factors).
			    • A brief description of the PS response to the service.
			    • A brief summary of next steps.
			• Daily residential treatment notes can be entered using the "Service Note (Client)"
			    • Programs that complete a note for each service will need to ensure they are completing
			    • One Service Note (Client) with procedure code Residential Treatment- Substance Us, Service Time will be 1 day.
			    • 2) Any other services will be documented using the Client Non Billable Srvc Must Document procedure code except when providing Care Coordination, use TCM/ICC

			procedure code. For Start Time on the note input actual time of service. • Select the Location most appropriate for services. Location: Residential Substance Abuse will be most commonly used. • Billing Diagnosis should pull from Diagnosis Document. Diagnosis Document should have an effective date prior to the service being provided. • Editing a note is possible even if you have signed it, if it has not gone through the billing process and marked "complete" • Once a note has been billed and "complete" you will need to enter a "My Report Errors" correction. This will mark the note as an error. This will allow for the error to be corrected either by our billing department or you will be able to make corrections.
	Managing Groups (My Office)	Create a new group: https://2023.calmhsa.org/how-to-set-up-a-group/ After groups have been created and scheduled using the "Managing Groups" function, select the service date of the group which will take you to "Group Service Detail" where the group note will be completed. https://2023.calmhsa.org/how-to-write-a-group-progress-note/ How to Edit Group Note: Video Titled "How to Edit a Single Recurring Group Appointment" and "How to Edit Multiple Recurring Groups by Using the Recurring Scheduler" How to fix a Group Error: Video Titled Errors and Deleting a Scheduled Group Service. Group Documentation Videos - 2023 CalMHSA	There are several ways to get to "Group Service Detail" Screen. • Managing Groups (My Office) • Staff Calendar (My Office) if it is a scheduled group • Group Service (My Office) When making a reoccurring group there is a "Create Immediately checkbox" if you click on that it will create an appointment with a service note attached in your Staff Calendar. If you do not click on "Create Immediately check box" it will create a placeholder for that group on the staff calendar. When creating a reoccurring group and adding clients to this group be mindful how far out the reoccurring services you input on the "end date" especially for groups that are created with service notes attached, if a client discharges from your program you will need to edit your group to remove the client or else you

			will have a list of services that are scheduled for that client. **Residential Programs only for Group Note select the Non-Billing procedure code available on the drop down**
	Group Sign In Sheet	No Equivalent	Sign in Sheets can be stored outside of SmartCare
Discharge a Client	Discharge Plan	Should be completed as Service Note (Progress Note) and it is part of Care Coordination, when the person served participates in the development of the Discharge plan.	
	CalMHSA Discharge Summary (Client)	https://2023.calmhsa.org/how-to-get-a-discharge-summary/	This form satisfies most of the D/C Summary guidelines per Perinatal/SABG/AOD certification guidelines. AOD certification standards specify vocational/education achievements must be documented which can be done in the "Client Strengths" section of the summary.
	CalOMS Update/ Discharge (Client)	CalOMS Discharge: How to Complete a CalOMS Discharge	• For persons that started services prior to July 1, 2023, please make sure to complete discharge in Avatar • Both the discharge and annual update use the same form. • Complete the CalOMS discharge before you discharge the client from your program
	Client Programs (Client)	Discharge Client from your program: How to Close a Client to a Program	Click back into the status "enrolled" link, change the current status from "enrolled" to "discharged" and enter the discharge date. Hit save.
Added SmartCare Functionalities Special Populations	Client Flags	How to Add Flags: https://2023.calmhsa.org/how-to-create-a-flag-to-alert-treatment-team-members-to-important-client-information/	DBH Recommended Flags ○ Client's parent/guardian does not speak English ○ Client also has private insurance ▪ Use in cases of any other health coverage ○ Court Order ○ Deceased

			○ Do NOT disclose info/SB24 in place
			○ Minor consent
			○ Staff safety concern
			  ▪ Use in cases where safety of staff may be compromised; be specific
			○ *Receptionist Flags:*
			  ▪ Two missed appointments
			  ▪ Scheduling notes
			○ *Special Teams Flags:*
			  ▪ Early Intervention Services

	Special Population (Client) CalMHSA Special Populations Report (My Office) Fresno CalMHSA Special Populations Report (My Office)	SmartCare can tag clients with a Special Population label. Some of these Special Population labels have a billing modification code that will affect billing. Before adding a Special Population label read the News You Can Use regarding Special Populations current protocol has identified specific DBH Departments/Programs to add some of these labels. Special Population Report https://2023.calmhsa.org/calmhsa-special-populations-report/	List of current Special Population CalWorks Child Protective Services Foster Care ICC/IHBS Katie A-ICC/IHCI LPS Conservatorship Other Conservatorship Presumptive Transfer Probation Therapeutic Foster Care (TFC) At times you may not be the one adding a Special Populations to a client but may have to remove the tag as they no longer qualify for that Special Population. You may not need to add or remove a Special Population tag to a client but be aware that a client has one.
	Scanning/Uploading to SmartCare	How to Scan or Upload Documents into the Client's Record - 2023 CalMHSA	Scanned files can be seen in Client's Chart in "Documents" screen double check your filters to ensure they are pulled within the appropriate timeframe

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	Message (My Office)	You can use this messaging feature to contact your program regarding person served within SmartCare https://2023.calmhsa.org/how-to-send-a-message/	You can attach a message as part of the person served's chart
	Review SmartCare Set up	Program Assignments	Review clients in your program Search "Program Assignments" form Filter for your program Filter status "All Statuses" Filter Dates to include at least the last year.

	Program Assignments (List Page)	• Provides an overview of all persons requested, enrolled, or discharged in your program
		• Allows for several filters
		    • By program
		    • By clinician/counselor
		    • By date range
		    • By enrollment
		• You can use this to determine existing census
		    • If a person served is not showing as enrolled here, they need to be enrolled in your program
		        • The date of enrollment must be prior to the first date of service being billed
		        • This will clear the "client not enrolled in program" error
			• Reports/List pages are based on user roles (LPHA, Reception) You may not have access to all of the reports
			
			• Reports that are written by CalMHSA will start with CalMHSA
			
			• Reports that are written by DBH Fresno ISD start with Fresno
			
			•

Reports/List Pages	Service Report Excel Format	Provides all services for a program.	
	Services Diagnosis Errors	Shows all services that have errors related to diagnosis. Diagnoses must be fixed before services will be billed.	

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	CalMHSA Program Charge Error Report	Shows all services that have errors with coverage plans. Coverage plans must be updated and corrected before services can be billed.	
	Fresno Program Enrollment and Coverage Plan Setup	Shows all coverage plans for persons currently enrolled in your program.	
	Fresno Staff Setup	Shows the setup information for all staff including type of user and assigned programs.	
	Fresno Program and Staff Procedure Codes	Shows all staff assigned to each program and the procedure codes available for each staff member.	
	My Services (list page)	Shows all services provided by the user that is logged in. Allows for several filters • By Client • Status of the service • Procedure Code • Program (This may depend on your user role) • Date • Service type • Staff (This may depend on your user role)	
	Caseload (list page)	Allows staff to see clients that have been seen (a note has been written for them)	
	Services/Notes (Client)	Shows all services entered for the selected client. •Allows for several filters: Clinicians, Status of the Service, Procedure Code, Program (depending on user role), Date, Service Type, Staff (depending on user role)	
	Documents (Client)	Shows all documents that has been created (including any scanned documents) for the selected client.	
	CalMHSA Progress Note Timeliness Report (My Office)	Shows timeliness of documentation by program and percentage of services documented within 72 business hours and 24 business hours for procedure codes. Must have the Clinical Supervisor Role to access	