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SmartCare LTC/SNF Residential Data and Bill With Residential Board Training

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# Client Search/New Client

In SmartCare the proper sequence when receiving a new client is to:

1. Search for the client to see if they are already in the system
2. Create the client if they were not already in the system

## Client Search

[How to Use the Client Search Window](https://2023.calmhsa.org/how-to-use-the-client-search-window/)

## Create Client

[How to Create a New Client](https://2023.calmhsa.org/how-to-create-a-new-client/)

# Residential Bedboard

Residential Bedboard is a list page used by residential programs to manage beds. The Residential Bedboard list page shows all beds and identifies whether the bed is in use or not. You can use Residential Bedboard to manage new admissions and discharges, clients’ attendance, and change beds and programs. Admitting a client using this Bedboard will automatically enroll the client in the designated Program.

## How to Open the Residential (My Office) List Page

1. Click the Search icon.
2. Type ‘Residential’ into the search bar.
3. Click to select Residential (My Office).
4. Ensure that you have set the filter to today’s date and the program you should be viewing.

## How to Schedule Admission of a Client to a Bed

If you are uncertain if the client will actually be admitted to your program, you may choose to use the Schedule Admission function. This will add the client to your program in a Requested Enrollment status and allow you to document screening and any services provided before a decision to Admit has been made.

After you have selected the client you are going to admit to your program and navigated to the Residential (My Office) List Page:

1. Locate an empty bed in your facility on the Residential (My Office) List Page.
2. Click the down arrow in the Status column in the row for the target bed.
3. Choose the Schedule Admission link.
4. The Census Management – Schedule Admission screen will open.
   1. Verify the Scheduled Date is set to today
   2. Choose the correct Client Type
   3. Choose the correct Admission Type
   4. Billing Procedure – This will set the Level of Care for the client. It will default to Level 1. Click the dropdown and choose another level if needed.
5. Click the Save Icon. A requested enrollment to the Program associated with the bed will be created automatically and documentation may proceed.
6. When the decision is made to Admit the client, return to the Residential Bedboard, locate the client and click the down arrow in the Status column
7. Choose the Admit link
   1. Verify the Admit Date and Time are correct
   2. Verify the correct Program is selected
   3. Choose the correct Client Type
   4. Choose the correct Admission Type
   5. Verify the Billing Procedure is correct.
8. Click the Save Icon. The requested enrollment will be updated to Enrolled.

## How to Admit a Client to a Bed

If you have decided to fully admit the client to your program you must complete the admission.

After you have selected the client you are going to admit to your program and navigated to the Residential (My Office) List Page:

1. Locate an empty bed in your facility on the Residential (My Office) List Page.
2. Click the down arrow in the Status column in the row for the target bed.
3. Choose the Admit link.
4. The Census Management –Admit screen will open.
   1. Verify the Admit Date and Time are correct
   2. Choose the correct Client Type
   3. Choose the correct Admission Type
   4. Billing Procedure – This will set the Level of Care for the client. It will default to Level 1 Bed Day. Click the dropdown and choose another level if needed. It will no longer be necessary to move the client from one SubUnit to another to reflect changes in Level of Care.
5. Click the Save Icon. An enrollment to the Program associated with the bed will be created automatically.

## How to Change Level of Care

Clients are in a Level 1 Bed Day status by default. SmartCare will generate bed day services automatically as long as the client is admitted to your facility.

1. From the Residential (My Office) List Page, locate the client.
2. Click the down arrow in the Status column.
3. Choose the Billing Code Change link.
4. The Census Management – Billing Code Change screen will open
   1. Verify the Start Date and Time is correct
   2. In the Billing Procedure dropdown, select the correct Level Of Care
      1. Level 1 Bed Day
      2. Level 2 Bed Day
      3. Level 3 Bed Day
      4. Level 4 Bed Day
      5. Level 5 Bed Day
      6. Bed Hold Day
5. The client’s Level of Care will be changed in the system as of the date/time entered. This Level of Care will remain in effect until it is changed again.

## Timeliness

SmartCare has 4 Timeliness documents available

[How to Complete the MH Non-Psychiatric SMHS Timeliness Record](https://2023.calmhsa.org/how-to-complete-the-mh-non-psychiatric-smhs-timeliness-record/)

[How to Complete the MH Psychiatric SMHS Timeliness Record](https://2023.calmhsa.org/how-to-complete-the-mh-psychiatric-smhs-timeliness-record/)

[How to Complete the DMC Opioid Timeliness Record](https://2023.calmhsa.org/how-to-complete-the-dmc-opioid-timeliness-record/)

[How to Complete the DMC Outpatient Timeliness Record](https://2023.calmhsa.org/how-to-complete-the-dmc-outpatient-timeliness-record/)

# Intake

## CalOMS

[How to Complete a CalOMS Admission](https://2023.calmhsa.org/how-to-complete-a-caloms-admission/)

[How to Complete a CalOMS Referral/Transfer](https://2023.calmhsa.org/how-to-complete-a-caloms-referral-transfer/)

## CSI Standalone Collection

[How to Complete a CSI Demographic Record](https://2023.calmhsa.org/how-to-complete-a-csi-demographic-record/)

# Authorization

## Program Request for Authorization

Use current paper submissions for Authorization. Optum will then enter the Authorization into SmartCare.

# Documentation

## LPHA/Non-LPHA/Admin

1. Diagnosis Document (LPHA)

[How to Add a Diagnosis](https://2023.calmhsa.org/how-to-add-a-diagnosis/)

[How to Delete a Diagnosis](https://2023.calmhsa.org/how-to-delete-a-diagnosis/)

[How to Modify and/or Re-Order a Diagnosis](https://2023.calmhsa.org/how-to-modify-and-or-re-order-a-diagnosis/)

[How to Modify a Diagnosis After the Document is Generated](https://2023.calmhsa.org/how-to-modify-a-diagnosis-after-the-document-is-generated/)

[How to Save a Favorite Diagnosis](https://2023.calmhsa.org/how-to-save-a-favorite-diagnosis/)

[How to Pull a Diagnosis Forward from Another Program](https://2023.calmhsa.org/how-to-pull-a-diagnosis-forward-from-another-program/)

[Reordering Diagnoses List](https://2023.calmhsa.org/reordering-diagnoses-list/)

1. Assessment
   1. MH - CalAIM Assessment

[CalAIM Assessment](https://2023.calmhsa.org/calaim-assessment/)

* 1. SUD – ASAM/Problem List

[ASAM Assessment](https://2023.calmhsa.org/asam-assessment/)

# Service Entry

## Group Services

[How to Add a New Client to a Group](https://2023.calmhsa.org/how-to-add-a-new-client-to-a-group/)

[How to Add or Change a Staff Member in a Group](https://2023.calmhsa.org/how-to-add-or-change-a-staff-member-in-a-group/)

[How to Set Up a Group](https://2023.calmhsa.org/how-to-set-up-a-group/)

[How to Write a Group Progress Note](https://2023.calmhsa.org/how-to-write-a-group-progress-note/)

[Group Documentation Videos](https://2023.calmhsa.org/group-documentation-videos/)

## Peer Services

[How to Write a Progress Note for an Unscheduled Service](https://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduled-service/)

1. Procedures
   1. Behavioral Health Prevention Education service
   2. Self-help/peer service

## Medication Services

[How to Write a Progress Note for an Unscheduled Service](https://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduled-service/)

1. Procedures
   1. Medication Support New Client
   2. Medication Support Existing Client

# Discharge

## Update CSI

[How to Complete a CSI Demographic Record](https://2023.calmhsa.org/how-to-complete-a-csi-demographic-record/)

## CalMHSA Discharge Summary

[How to Complete the Discharge Summary](https://2023.calmhsa.org/how-to-complete-the-discharge-summary/)

## Discharge from Program

Discharge the client and remove them from the bed using the Residential Bedboard.

1. Click the Search icon.
2. Type ‘Residential’ into the search bar.
3. Click to select Residential (My Office).
4. Ensure that you have set the filter to today’s date and the program you should be viewing.
5. Find the client to be discharged in and click the down arrow in the Status column
6. Choose the Discharge link
7. The Census Management – Discharge screen will open
   1. Ensure that the Discharge Date/Time are accurate
   2. Choose a Discharge Type
8. Click the Save icon
9. The client will now be discharged from the program and removed from the bed