SmartCare Residential Data and Bill Only Training

Contents

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

Create Client

How to Create a New Client

Open client to your Program

How to Add the Client to Your Program

Timeliness

SmartCare has 4 Timeliness documents available

How to Complete the MH Non-Psychiatric SMHS Timeliness Record
How to Complete the MH Psychiatric SMHS Timeliness Record
How to Complete the DMC Opioid Timeliness Record
How to Complete the DMC Outpatient Timeliness Record

Intake

CalOMS

How to Complete a CalOMS Admission
How to Complete a CalOMS Referral/Transfer

CSI Standalone Collection

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
   How to Delete a Diagnosis
   How to Modify and/or Re-Order a Diagnosis
   How to Modify a Diagnosis After the Document is Generated
   How to Save a Favorite Diagnosis
   How to Pull a Diagnosis Forward from Another Program
   Reordering Diagnoses List
2. Assessment
   a. MH - CalAIM Assessment
      CalAIM Assessment
   b. SUD – ASAM/Problem List
      ASAM Assessment

Service Entry

Bed Day

It will no longer be necessary to move the client from one SubUnit to another to reflect changes in Level of Care. Manual documentation of the Bed Day Type is completed by creating a Service for the day and selecting the proper Level of Care. A service can be created in various ways. See items below for creating manual services.

1. With an active client selected, Click the Search icon.
2. Type 'Services' into the search bar.
3. Click to select Services (Client). The Services list page will open.
4. Select the New icon from the tool bar. A new Service Detail page opens.
5. Change the status to Show.
6. Select the Clinician, 'System, BedDay', from the dropdown.
   a. We understand bed services are not associated with a clinician. However, SmartCare structure requires a clinician for all services, even when it does not go out in the claim.
7. Select the Program from the dropdown.
   a. The Procedure will determine the Bed Day type. Administrative options will include "-Admin" in their displayed name.

8. Select the Procedure from the dropdown.
    a. This is where you should select the bed procedure.
        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
9. Select the Location from the dropdown.
10. Complete the start time and date.
11. Enter Face to Face time in days.
12. Enter the attending. This is required for institutional claims.
13. Click the Save and Close buttons.
14. The service is now created and billing jobs will complete the service. Additional steps by jobs and billing staff will have this service sent out as a claim.

Bed Hold Day

1. With an active client selected, Click the Search icon.
2. Type 'Services' into the search bar.
3. Click to select Services (Client). The Services list page will open.
4. Select the New icon from the tool bar. A new Service Detail page opens.
5. Change the status to Show.
6. Select the Clinician, 'System, BedDay', from the dropdown.
    a. We understand bed services are not associated with a clinician. However, SmartCare structure requires a clinician for all services, even when it does not go out in the claim.
7. Select the Program from the dropdown.
    a. The Procedure will determine the Bed Day type. Administrative options will include "-Admin" in their displayed name.
8. Select the Procedure from the dropdown.
    a. This is where you should select the bed procedure.
        1. Bed Hold Day
9. Select the Location from the dropdown.
10. Mode of Delivery – not required
11. Complete the start time and date.
12. Enter Face to Face time.
    a. Note, the field is face to face but is the total of the entry type. For example: if the procedure is set up as hours it would be the total hours.
13. Enter the attending. This is required for institutional claims.

14. Click the Save and Close buttons.
15. The service is now created and billing jobs will complete the service. Additional steps by jobs and billing staff will have this service sent out as a claim.

Group Services

How to Add a New Client to a Group
How to Add or Change a Staff Member in a Group
How to Set Up a Group
How to Write a Group Progress Note
Group Documentation Videos

Peer Services

How to Write a Progress Note for an Unscheduled Service

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

Medication Services

How to Write a Progress Note for an Unscheduled Service

1. Procedures
    a. Medication Support New Client
    b. Medication Support Existing Client

Discharge

Update CSI

How to Complete a CSI Demographic Record

CalMHSA Discharge Summary

How to Complete the Discharge Summary

Discharge from Program

How to Close a Client to a Program