

## Adding to SmartCare Release of Information Log for Authorizations completed in Anasazi

1. In Anasazi pull up client on Clinicians Home Page
2. View List of Authorizations that are current in Assessments tab
3. Check to see if:
  - a. LPHA signed
  - b. LPHA signature is needed.
4. If LPHA signature is needed go to 7
5. If LPHA Signature not needed or LPHA already signed
  - a. Go to Anasazi, print signed copy of authorization to PDF and attach to record in SmartCare
  - b. Go to Release of Information Log on Client Information Screen
  - c. Type in Release to box the entity on the Authorization, the start and end(expiration) date per the AZ Authorization set a reminder for notification, add a comment that original was done in Anasazi and attach the scanned document, then select insert

Client Information (C)

General Aliases Demographics Financial **Release of Information Log** Contacts Family External Referral Custom Fields

Client Releases

Release To: Community Health Centers Start Date: 12/14/2022 End Date: 12/13/2023

Comment: CHC Hard Copy Signature done in AZ

Remind 30 Days Before End Date

Attach Release Document...

BH Auth to Use/ Disclose PHI: BH Auth to Use/ Disclose PHI

- d. This will then show in the List of Releases below:

List Of Releases  Show only releases that are currently effective ✗ END ALL RELEASES

		Release To Name	Start Date	End Date	Release Documents	Reminder Days	Comment
		Community He...	12/14/2022	12/13/2023	BH Auth to Use/ C 30		CHC Hard Copy Signature done in AZ

6. Repeat as Needed and Save.
7. If LPHA did not sign authorization in Anasazi
  - a. Open Authorization in AZ to view
  - b. With client selected in SmartCare launch Release of Information Authorization

- c. Change Effective date to match date of authorization in AZ (use calendar)

**Release of Information**

Effective 06/07/2023  Sta

Page: 1 of 4  
Date: 06/07/2023

- d. In expiration section change dates to match date of authorization and expiration date to match Authorization in Anasazi

**Expiration**

If nothing marked - one(1) year from date signed

1 time disclosure  6 months

Start Date 06/07/2023  End Date 06/06/2024 

- e. Complete ROI Authorization to match AZ Information to be Used or Disclosed
  - f. Sign
  - g. Co-Sign client and/or parent signature as hard copy signature to match AZ copy
  - h. Add LPHA/Staff to co-sign
8. Once LPHA/Staff signatures are obtained link documents.

- a. In Documents Client link Release of Information and Scanned document by selecting Add under Associated Documents on line for Release of Information

Shared	Associated Documents
Yes	<a href="#">Add</a>
Yes	<a href="#">Add</a>

- b. Select Add next to Scanned Document

<a href="#">Add</a>	<a href="#">Release of Information</a>	07/10/2023
<a href="#">Add</a>	<a href="#">Scanned Medical Record</a>	07/10/2023

- c. Select Okay and it will bring you back to Document page showing association.
- d. Repeat for Scanned Document linking it to the Release of Information.

9. Go to Client Information Release of information Log.

- a. Enter Type in Release to box the entity on the Authorization, the start and end(expiration) date per the AZ Authorization set a reminder for notification, add

a comment that original was done in Anasazi and attach the scanned document, and the SmartCare Release of Information

**Documents**   Preview

All Authors   All Documents   All Statuses

Effective From 07/12/2022   Effective To

	Document	Effective
<a href="#">Add</a>	<a href="#">Release of I...</a>	07/10/2023
<a href="#">Add</a>	<a href="#">Scanned Medi...</a>	07/10/2023
<a href="#">Add</a>	<a href="#">BH Youth 0 -...</a>	06/09/2023
<a href="#">Add</a>	<a href="#">Diagnosis Do...</a>	06/09/2023
<a href="#">Add</a>	<a href="#">Diagnosis Do...</a>	06/09/2023

**List of Attached Documents**

	Document	Effective	Status
X	<a href="#">Release of Information</a>	07/10/2023	Signed
X	<a href="#">Scanned Medical Record</a>	07/10/2023	Signed

- b. Select OK, this will bring you back to the Release of Information Log, select Insert
- c. This will then show in the List of Releases below:

List Of Releases    Show only releases that are currently effective    END ALL RELEASES

			Release To Name	Start Date	End Date	Release Documents	Reminder Days	Comment
X	🔒	🔒	Community He...	12/14/2022	12/13/2023	<a href="#">BH Auth to Use/ 30</a>		CHC Hard Copy Signature done in AZ

- d. Repeat as Needed and Save.