## How to Scan a Document into Client's Record

SmartCare search words in **bold**.

To scan, you need a scanner attached to your workstation. Scanning will use your scanner's software but save it in SmartCare.

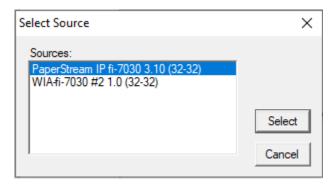
- 1. With the client record open, click the Search icon.
- 2. Type **Scanning** in the search bar.
- 3. Select Scanning (My Office) from the search results.



- 4. a. To scan a single document, click the "Scan New Images" icon.
- b. To scan multiple documents in a batch, click the "Start Scan Upload" button.

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#### 5. Select your scanner.



6. To scan a single sided document, insert the document face down into your scanner. In the Simple tab under Paper Source, select Feeder Front Side. Click Scan.

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7. Select Finish when done.

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To continue scanning, load the document on the scanner. Scanning will start automatically.	
Finish	

8. Ensure the document scanned correctly and all pages are visible.

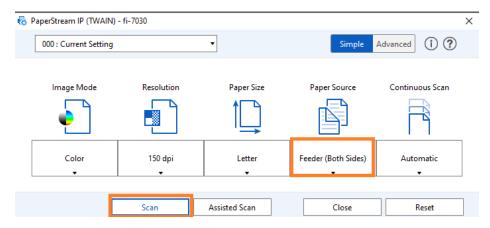
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9. Select Client Medical Records. Ensure client MR# & Client Name auto fills. (If not, click the ellipsis button which will take you to the client search window.) Enter in effective date (date of document.) Select Record Type from the drop-down. Enter naming convention in the Description field. Select the Program. Click Save and X to close.

Note: we have asked CalMHSA to include our document types in the Record Type drop-down menu. (Admin/Correspondence, Hard Copy Signed Docs, Legal, etc.) We are awaiting their response.

Scanned Medical Record Detail	i 🖬 🗈 🖬 Savo 🗙
Cliant (Medical Records) V 1026 Cat, Kitty Record Type Labs V Description MH Laboratory Report Image Details	C Effective 06/06/2023
Whole Page         Zoom In         Zoom Out         Delete         Reload         Reload All         Insert Page(s)         Append Page(s)         Edit Image         Page(s)	age1 V of 1

10. To scan a double sided document, insert the document face down into your scanner. In the Simple tab under Paper Source, select Feeder (Both Sides). Click Scan.



11. Select Finish when done.

Note: For multi-page documents-when the document starts to scan, it will pull the last page of the document into the scanner first.

🐻 PaperStream IP	×
To continue scanning, load the document on the scanner. Scanning will start automatically.	
Finish	

Follow steps 8 & 9 from above to attach the document to the client record.

# How to Scan a Document into Client's Record Without a Scanner

- 1. With the client open, click the Search icon.
- 2. Type **Scanning** in the search bar.
- 3. Select Scanning (My Office) from the search results.

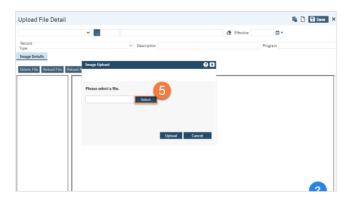


4. You can upload documents one at a time or as a batch.

- a. To upload a single document, click the "Upload New Images" icon.
- b. To upload multiple documents in a batch, click the "Start Batch Upload" button.

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ssociated With	ID	Name	Record Type	Crea	ted ⊽	Effective	Sca	nned By	Status	BatchId	Provider	
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5. Choosing upload will open the Upload File Detail screen. This will include a pop-up. Click Select to find the file on your computer. (It must be a PDF.)



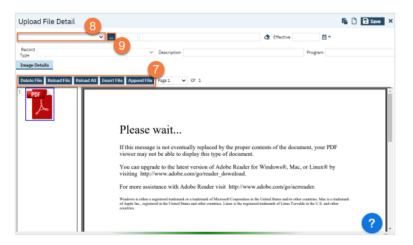
6. Once it's ready, a little green circle will appear next to it. Click Upload.



7. This will show you the PDF. Confirm you've uploaded the correct document. Make corrections as needed using the buttons at the top of the PDF viewer.

8. Select Client Medical Records from the first dropdown menu.

9. If you do not have the client record open, you can click on the ellipsis button to find the client. (The client search will open. Search to find the client. Click Select when you've located the client.)



- 10. Select the Record Type.
- 11. Enter the description of the document.
- 12. Enter the program the document is associated with.
- 13. Enter the Effective date of the document.
- 14. Click Save.

Upload File Detail		13	🕼 🗋 🖬 Save 🛛 🗙
Client (Medical Records)	239 Training Manual	▲ Effective ■	14
Record Type All Record Types Image Details	10 Description	Program Outpatie	12
Delete File Reload File Reload All Insert Fi	le Append File Page1 🗸 Of 1		
	viewer may not be able to display this ty You can upgrade to the latest version of visiting http://www.adobe.com/go/read	Adobe Reader for Windows®, Mac, or Linux® by er_download.	
	For more assistance with Adobe Reader	visit http://www.adobe.com/go/acrreader.	

# How to view scanned documents in the record

We have found two ways to view scanned documents in the client's chart.

1. The first way is with the client open, search **Documents** and select **Documents (Client)**.

ocuments (41)							c	reate Document.		<ul><li>●☆</li></ul>
All Authors	♥ 06/08/2022	All Statuees		v Due	in X daya	♥ 0 External Document		Apply Filter		
Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Doc
Adult Screening Tool		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent For Email Communication		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent For Telehealth		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent For Text Communication		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent To Treat		05/02/2023	Signed	1		Seaman, Kimbert			Yes	Add
Consent To Treat		04/28/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/16/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/05/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/05/2023	Signed	1		Seaman, Kimbert			Yes	Add
Coordinated Care Consent		05/05/2023	Signed	1		Seaman, Kimbert			Yes	Add
CSI Standalone Collection		05/16/2023	Signed	1		McGuire, Kathy			Yes	Add
CSI Standalone Collection		05/02/2023	In Progress	1		Seaman, Kimbert			Yes	Add
Lab Orders (MH Laboratory Requisition Form)		05/09/2023	Completed	1		Seaman, Kimbert			Yes	Add
Lab Orders (MH Laboratory Requisition Form)		05/09/2023	Completed	1		Seaman, Kimbert			Yes	Add
Progress Note ( Client Non Billable Srvc Must Docu		06/02/2023	In Progress	1		Joaquin, Tara Leij			Yes	Add
Progress Note ( Comprehensive Multidisciplinary Ev		05/30/2023	To Do	1		MH CLINICIAN2,			Yes	Add
Progress Note ( Consult )		06/07/2023	To Do	1		Joaquin, Tara Leij			Yes	Add
Prostress Note ( Consult )		06/06/2023	To Do	1		Weissman Jennit			Ves	hhū

2. This will take you to a document list page which shows all documents (forms and scanned items in the client's record), where you can enter search parameters and click apply. You can sort the list alphabetically by clicking the Document/Description header. You can open a document by clicking on the document name.

The second way to view scanned documents only:

1. With the client open, click the Search icon.

- 2. Type **Scanning** in the search bar.
- 3. Select Scanning (My Office) from the search results.



- 4. Set the parameters.
  - a. Select Client Medical Records in the All-Associations field. Ensure correct client is displaying; if not, click the ellipsis button to go to the client search screen. You can leave All Record Types or specify specific records you are searching for.
  - b. Ensure Show Scanned/Uploaded is selected in this field. In the All-Scanning Staff field, you can view documents scanned by all staff or individual staff. You can view all statuses or select completed or not completed.
  - c. You will need to enter either effective dates or created between dates to specify the date range you are looking for. (Similar to AZ's filters) Note: Effective date is the date of the document. Created date is the date the document was scanned into the record.

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d. Once the parameters are set, click Apply Filter.

5. You can see the document description/ naming convention by placing your cursor over the name in the record type column.

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PSC-35 Reporting List Page	Client (Medical Records)	1026 <u>Cat. R</u>	🗤 s 🔤 So	anned N	ledica	l Recor	d (Healtl	n Quest	ionnair	e)		
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6. You can view the scanned document by clicking on the document icon.

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7. Once the scanned document opens, you can print the scanned document by selecting the print icon.

Associated With: Cat, Kity Record Type: Scanned Medical Record (Test Scan) Effective Date: $05/03/2023$ $\square   \overline \vee   \overline Draw \vee \overline   \overline   Read aloud - + \overline   1 of 5   \overline   \overline   \overline \overline   \overline $	View Images		د
□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	Associated With: Cat, Kitty	Record Type: Scanned Medical Record(Test Scan) Effect	tive Date: 05/03/2023
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# How to attach scanned documents to SmartCare forms

- 1. With the client open, search **Documents**. Select **Documents (Client).**
- 2. Locate the completed SmartCare form you want to associate a scanned document with.
- 3. Click the Add link in the Associated Documents column.

ocuments (41)									Create Document.		
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Document/Description Scanned Medical Record(RH Au Release of Information Progress Note : Memain Recits A Progress Note : (Mental Health A	Assessment by Non-Ph	Name	06/08/2023 06/08/2023	Status Completed Signed To Do	_		Author So Co, Test Fron So Co, Test Fron	To Co-Sign	Others to Sign	Yes Yes	Add Add

4. The Associate Documents window will open. Locate the scanned document.

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All Clinicians	~	All Docun	nents	✔ All Statuses	~		Apply Filter
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Add	Release of Informatio	n	06/08/2023	Signed	So Co,	Test Front Office	
Add	Scanned Medical Rec	ord	06/08/2023	Signed	So Co,	Test Front Office	
Add	UMDAP Financial Ass	essment	05/22/2023	Signed	So Co,	Test Front Office	
Add	Release of Informatio	n	05/18/2023	Signed	So Co,	Test Front Office	
Add	Release of Informatio	n	05/18/2023	Signed	So Co,	Test Front Office	
Add	Release of Informatio	n	05/17/2023	Signed	Seama	n, Kimberly	

5. Click on the document name to open and ensure it is the correct document you want. If it is correct, click the Documents tab.

eociate Documents Accounted Documents (2 icuments Preview	8) OK Cancel
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## 6. Click Add. Click OK.

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Add All	Document	Effective	Status	Author	
\dd	Release of Information	06/08/2023	Signed	So Co, Test Front Office	
\dd	Scanned Medical Record	06/08/2023	Signed	So Co, Test Front Office	
Add	UMDAP Financial Assessment	05/22/2023	Signed	So Co, Test Front Office	1
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
\dd	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
\dd	Release of Information	05/17/2023	Signed	Seaman, Kimberly	
Add	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly	
\dd	CSI Standalone Collection	05/16/2023	Signed	McGuire, Kathy	
	PSC-35 (California Pediatric	0.000	61 - I		-

7. This will take you back to the Documents screen and the Associated Document will be shown. You can click the on the associated document name to view the scanned document.

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Document/Description		Group Name	Effective ∇	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Scanned Medical Record/BH Auth	orization to Disclos		06/08/2023	Completed	1		So Co. Test Fro	nt	1	Yes	Add
Release of Information			06/08/2023	Signed	1		So Co, Test Fro	int (		Yes	Scanned Medical Record
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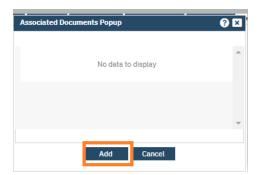
8. If you want to attach one scanned document to multiple completed forms, you will go to **Scanning** (My Office). Locate the scanned document and click on the created date.

canning (8)									3	lart Batch Upl	Start	Batch Scan	2		îr 🔺
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Client (Medical Records)	1026	Cat, Kitty	Lab Orders (MH Labor	D5/	09/2023	05/09/2023	Seama	in, Kimb	Completed				*		
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9. The Scanned Medical Detail screen will open. Click on the Associate Documents icon.

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Record Type Scanned Medical Record   BH Authorization to Disclose PHI (hard copy signature)	Program	SCA 0	Clinic Adu	ult (Grand)-05/31/2023 💙
Image Details				
Whole Page Zoom In Zoom Out Delete Reload Reload All Insert Page(s) Append Page(s) Edit Image Page 1 v of 1				
Litty Cot 6/8/2023 Kard Copy syncture & 6/8/202	3 ≮	La'	-	

10. A pop-up will open. Click Add.



11. The Associate Documents screen will open. Click on the form name and ensure it is the correct form you want.

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Effective From	06/08/2022 🛱 - Effective	То	<b>=</b>					
Add All	Document	Effective		Status		Author		
Add	Release of Information	06/08/2023		Signed		So Co, Test Front Office		
dd	Scanned Medical Record	06/08/2023		Signed		So Co, Test Front Office		
dd	Progress Note	06/02/2023		In Progress		Joaquin, Tara Leigh		
dd	Referral Document	05/25/2023		In Progress		Seaman, Kimberly		
kdd	UMDAP Financial Assessment	05/22/2023		Signed		So Co, Test Front Office		
dd	Release of Information	05/18/2023		Signed		So Co, Test Front Office		
dd	Release of Information	05/18/2023		Signed		So Co, Test Front Office		
dd	Release of Information	05/17/2023		Signed		Seaman, Kimberly		
dd	Coordinated Care Consent	05/16/2023		Signed		Seaman, Kimberly		
List of Assoc	ciated Documents							
Document			Effective		Status		Author	

12. If it is correct, click the Documents tab.

ocuments Preview	nts (31)		0K Cancel
Client: Cot, Kitty	Effective Date: 06/08/2023	Author: So Co, Test Pront Office	Status: Signed
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Client Inform Client Name:	Social AUTHORIZATION TO OBTA ation Cat, Kitty	•	Client ID:

13. Click the Add button next to the form. It will now be displayed in the List of Associated Documents section.

All Clinicians	✓ All De	ocuments 👻	All Statuses	Apply Fill	ter
Effective From	06/08/2022 🛗 🕶 Effect	ive To			
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dd	Progress Note	06/02/2023	In Progress	Joaquin, Tara Leigh	
dd	Referral Document	05/25/2023	In Progress	Seaman, Kimberly	
dd	UMDAP Financial Assessme	ent 05/22/2023	Signed	So Co, Test Front Office	
dd	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
dd	Release of Information	05/18/2023	Signed	So Co, Test Front Office	
dd	Release of Information	05/17/2023	Signed	Seaman, Kimberly	
dd	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly	
	Coordinated Care Consent ated Documents	05/16/2023	Signed	Seaman, Kimberly	

14. You may repeat these steps to add the scanned document to multiple forms. Once done, click OK.

Add All         Document         Effective         Status         Author           dd         Release of Information         06/08/2023         Signed         So Co, Test Front Office         dd           dd         Scanned Medical Record         06/08/2023         Signed         So Co, Test Front Office         dd           dd         Scanned Medical Record         06/08/2023         Signed         So Co, Test Front Office         dd           dd         Progress Note         06/02/2023         In Progress         Joaquin, Tara Leigh         dd           dd         Referral Document         05/25/2023         In Progress         Seaman, Kimberly         dd           dd         UMDAP Financial Assessment         05/22/2023         Signed         So Co, Test Front Office           dd         Release of Information         05/18/2023         Signed         So Co, Test Front Office           dd         Release of Information         05/18/2023         Signed         So Co, Test Front Office           dd         Release of Information         05/18/2023         Signed         So Co, Test Front Office           dd         Release of Information         05/18/2023         Signed         So Co, Test Front Office           dd         Release of Information         0	Add AllDocumentEffectiveStatusAuthorAddRelease of Information06/08/2023SignedSo Co, Test Front OfficeAddScanned Medical Record06/08/2023SignedSo Co, Test Front OfficeAddProgress Note06/02/2023In ProgressJoaquin, Tara LeighAddReferral Document05/25/2023In ProgressSeaman, KimberlyAddUMDAP Financial Assessment05/22/2023SignedSo Co, Test Front OfficeAddRelease of Information05/18/2023SignedSo Co, Test Front OfficeAddRelease of Information05/17/2023SignedSeaman, Kimberly	All Clinicians	×	All Docum	nents	~	All Statuses	v			Apply Filter	
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15. X out to close the Scanned Medical Record Detail screen. Go to **Documents (Client)** and this is how it will display.

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ocuments (41)							Cr	reate Document		<ul> <li>●☆★초</li> </ul>
All Authors V All Documents	~	All Statuses		Duei	in X daya	♥ 0	ther 🗸	Apply Filter		
Last 1 Year	From 06/08/202	2 🛗 ▼ To 06	6/08/2023	<b>•</b> •	Include	External Documen	ts			
Document/Description	Group	Effective ⊽	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Document/Description Scanned Medical Record(BH Authorization to Disclos	Name	Effective ⊽ 06/08/2023		Ver. 1	Due Date	Author So Co, Test Front		Others to Sign	Shared Yes	Associated Documents
	Name		Completed	Ver. 1 1	Due Date			Others to Sign		

16. If you click the Multiple link in the Associated Documents column, a pop-up will display showing the associated forms. You can click to open each form.

Name	Encourse y	oraco o	 Due Dure
Associated Docu	iments Popup		? ×
			3
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	Add/Modify	y Cancel	
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How to remove associated documents from SmartCare forms (if attached in error)

#### 1. In the Documents screen, click on the document/description.

Document/Description	Group Name	Effective ▽	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Progress Note ( Client Non Billable Srvc Must Docu		07/11/2023	To Do	1		Yarnold, Katelyn A			Yes	Add
Coordinated Care Consent		07/11/2023	In Progress	1		Seaman, Kimberl			Yes	Progress Note
Progress Note ( Psychosocial Rehabilitation Group	Music Shari	07/10/2023	Signed	1		Novikoff, Danica			Yes	Add

2. Click this icon.



#### 3. Select Associated Documents.

ľ		-
	Authorship	_
l	Print Amendment Requests	s
ľ	View Message	
	Send	
ľ	Acknowledge	
2	Acknowledge with Comme	nts
	Open Claim Line Detail	es r
	Associate Documents	ealt
ł	Spell Checker	
5	Error	ima

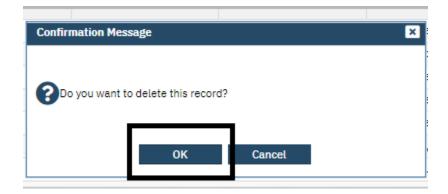
4. Click Add/Modify.

? ×
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#### 5. Click the X to remove.

All Clinicians	~	All Documents	*	All Statuses	*	Apply	Filter
ffective From	07/11/2022	Effective To	≡ -				
Add All	Document	Effective		Status	Autho	r	
	Progress Note	07/10/20	023	Signed	Novika	ff, Danica	
bb	Progress Note	07/09/20	)23	Signed	Bousk	os, Jordan	
<u>1d</u>	Progress Note	07/07/20	)23	Signed	Novika	tt, Danica	
54	Progress Note	07/07/20	023	Signed	Novika	ff, Danica	
<u>1d</u>	Progress Note	07/06/20	)23	Signed	Novika	off, Danica	
<u>1d</u>	Progress Note	07/06/20	023	Signed	Kathe	man, Charles Morris	
50	Progress Note	07/05/20	023	Signed	Johns	on, Julia Dannon	
<u>dd</u>	CCD MH	06/15/20	023	Signed	Provid	er, Conversion	

### 6. Click OK.



7. Then click OK in the Associated Documents screen.

	review								_	
All Clinicians	~	All Docum	ents	~	All Statuses	*			Apply Filter	
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Add All	Document		Effective		Status		Author			
Add	Coordinated Care (	Consent	07/11/2023		In Progress		Seaman, Kimberly			4
Add	Progress Note		07/10/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/09/2023		Signed		Bouskos, Jordan			
Add	Progress Note		07/07/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/07/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/06/2023		Signed		Novikoff, Danica			
Add	Progress Note		07/06/2023		Signed		Katherman, Charles Mo	rris		
Add	Progress Note		07/05/2023		Signed		Johnson, Julia Dannon			
Add	CCD MH		06/15/2023		Signed		Provider, Conversion			
List of Assoc	iated Documents									
Document				Effective		Status		Author		

## 8. X to close the document.

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Coordinated Care Consent	🗳 🚺 🖄 😌 🚥 🏯 🎝 🎫 i 🗰 🖶 🗅 📑 Sama 🗙							
	Authorship							
Effective 07/11/2023 🚔 Status In Progress Author Seaman, Kimberly	Print Amendment Requests 🕓 🕤 Sign 💽 🗲							
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General	Acknowledge							
Authorization for the Disclosure of Health and Other Personal Informat	Acknowledge with Comments							
By signing this form below, you will allow certain organizations and individuals to use and share your health and other	Open Claim Line Detail es related to							
your treatment and care. They will be able to share your information through an electronic health record system main								
Authority called SmartCare.	- ··· ·							