

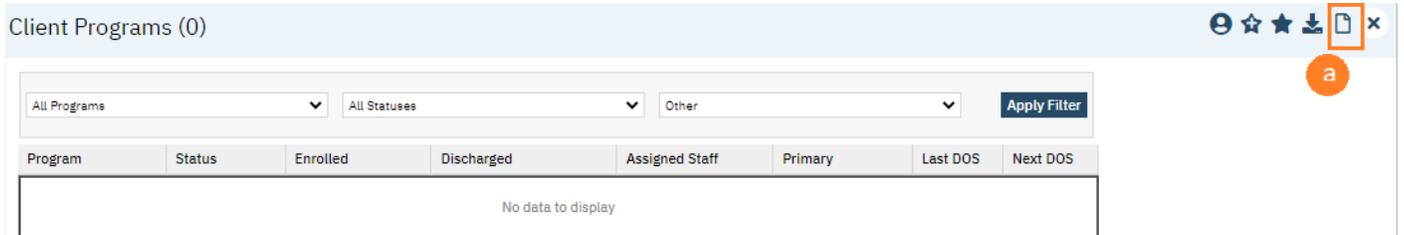
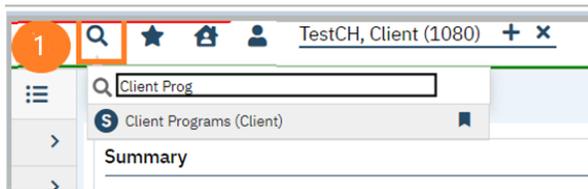
## UCC How-To

SmartCare search words in **bold** throughout this guide.

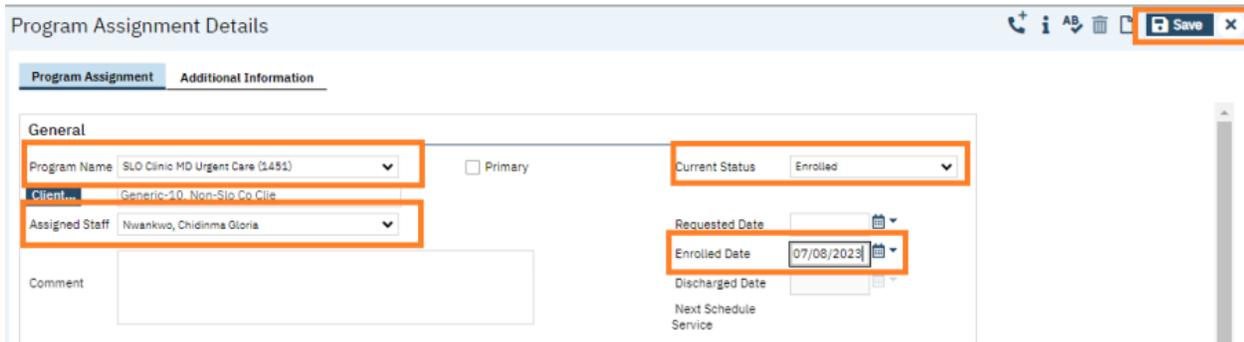
For Existing/Open clients:

### Enroll client in UCC program

1. With the client open, go to search bar and type in **Client Programs (Client)**.

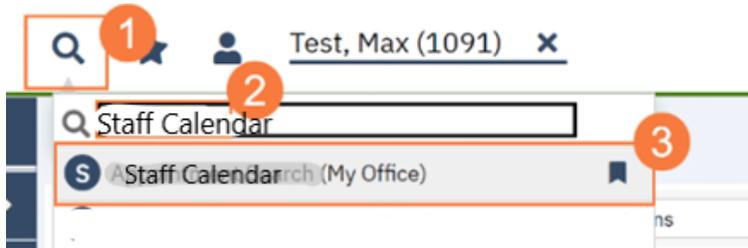


- Click new.
- In the Program Name field, select the UCC program.
- In Assigned Staff, select the staff member client will be seeing.
- In Current Status field, select "Enrolled".
- Enter in Enrolled Date.
- Click Save and X to close.

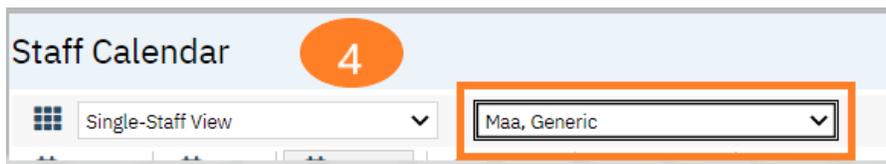


## Add Client to Staff's Schedule

1. With the client open, Click the Search icon.
2. Type **Staff Calendar** in the search bar.
3. Click to select **Staff Calendar (My Office)**



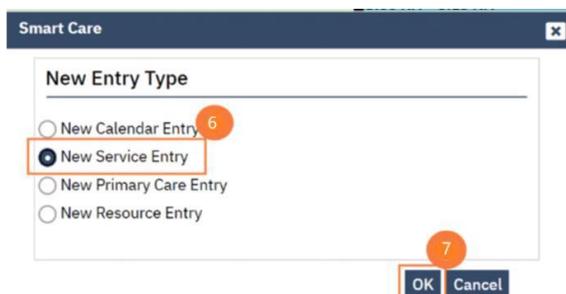
4. Select the staff you want to schedule for.



5. From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book. Note: If you are trying to schedule a time that has an available appointment spot indicated in the staff's calendar, you will need to click and drag your mouse in the white area next to the color block.



6. In the New Entry Type pop-up, select the New Service Entry radio button.



7. Click OK.

8. In the Service Notes screen, click the drop-down menu in the Program field and select the appropriate program.

9. Click the drop-down menu in the Procedure field and select the appropriate procedure.

10. Click the drop-down menu in the Location field and select the appropriate location.

11. Click in the Total Duration field and enter the duration of the appointment.

The screenshot shows the 'Progress Note (MH)' form. At the top, it displays 'Effective 11/21/2022', 'Status New', and 'Author Clinician, Robert'. Below this are tabs for 'Service', 'Note', 'Billing Diagnosis', and 'Warnings'. The 'Service' section contains several fields: 'Status' (Scheduled), 'Program' (Outpatient MH Adult), 'Procedure' (Therapeutic Behavioral Services), 'Location' (Community Mental Health Center), 'Clinician' (Clinician, Robert), and 'Cancel Reason'. To the right, there are time-related fields: 'Start Date' (11/21/2022), 'Start Time' (08:30 AM), 'Travel Time' (Minutes), 'Face to Face Time' (Minutes), 'Documentation Time' (Minutes), and 'Total Duration' (60 Minutes). Orange callout boxes with numbers 8, 9, 10, and 11 are placed over the Program, Procedure, Location, and Total Duration fields respectively.

12. Click the Save icon. Click the X icon to close the screen.

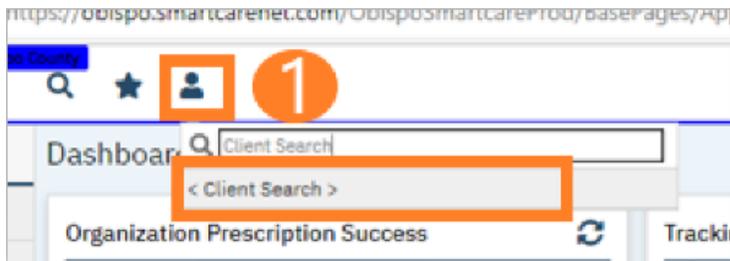
This screenshot shows the same 'Progress Note (MH)' form as above, but with a focus on the top right corner. A blue 'Save' button and a red 'X' icon are highlighted with an orange callout box labeled '12'. The form content is partially visible, showing the 'Effective' date and 'Status'.

## For NEW/UNOPENED clients:

Note-numbers in screenshots may not be same as step numbers (screenshots were taking from other how-to guides)

### Client Search & Inquiry

1. Use the Client Search



2. This will open the client search window. You may search to determine if the person is a current client.

- a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc.
- b. If you find the person in the system, meaning they show in the Records Found section, and they are closed/not open to a program, click the radial button to the left of their name, then click "Inquiry (Selected Client)" to bring their information into the Inquiry screen.

A screenshot of the "Client Search" window. The window has a title bar with "Client Search" and a close button. Below the title bar is a "Clear" button. The main area is divided into sections. The first section is "Name Search" with checkboxes for "Include Client Contacts" and "Only Include Active Clients (Checking will not allow option to create new Client)". There are buttons for "Broad Search" and "Narrow Search", and radio buttons for "Type of Client" (Individual and Organization). Below this are input fields for "Last Name", "Generic", "First Name", and "Program". The second section is "Other Search Strategies" with buttons for "SSN Search", "DOB Search", "Primary Clinician Search", "Authorization ID / #", "Phone # Search", "Master Client ID Search", "Client ID Search", and "Insured ID Search". The third section is "Records Found" with a table of results. The table has columns for ID, Master ID, Client Name, Chosen Name, SSN/EIN, DOB, Status, City, and Primary Clinician. The fourth row is selected, and a red circle with the letter "a" is over the "Generic-10, No..." text. At the bottom of the window, there are buttons for "Create New Potential Client", "Select", "Cancel", "Inquiry (Selected Client)", and "Inquiry (New Client)". A red circle with the letter "b" is over the "Inquiry (Selected Client)" button.

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
625553	625553	Genasci, Elena		9270	12/20/19...	Active	ATASCAD...	
490001	490001	Generic-1, No...			01/01/18...	Active	UNKNOW...	
490010	490010	Generic-10, No...			01/01/18...	Active	UNKNOW...	
490011	490011	Generic-11, No...			01/01/18...	Active	UNKNOW...	
490012	490012	Generic-12, No...			01/01/18...	Active	UNKNOW...	
490013	490013	Generic-13, No...			01/01/18...	Active	UNKNOW...	

- c. If a person is a new client, or you cannot find them in the system, click “Inquiry (New Client)”.

The screenshot shows a search interface with a red box around the message "No Search Records Found" and a red circle labeled 'C' next to it. Below this, there are search filters for "Name Search" (Broad Search, Narrow Search), "Type of Client" (Individual, Organization), and "All Client Search". A red box labeled '4' highlights the "Last Name" field containing "New". Below these are "Other Search Strategies" including SSN, DOB, Primary Clinician, Authorization ID, Phone #, Master Client ID, Client ID, and Insured ID. A table titled "Records Found" is empty with the message "No data to display". At the bottom right, there are "Select" and "Cancel" buttons, and a red box labeled 'C' highlights the "Inquiry (New Client)" button.

3. This brings you to the Inquiry Details screen.

- a. Enter Relation to Client, first and last name (if inquirer is someone other than the client.) If client, enter client’s first and last name and select self for relation to client.
- b. Enter the call back phone number.
- c. Make sure to input the start date and time. There are buttons for today “T” and “Now” to help make this quick and easy.

The screenshot shows the "Inquiry Details" screen with tabs for "Initial", "Insurance", and "Demographics". A red circle labeled '5' is in the top right. The "Inquirer Information" section has a red box labeled 'a-c' around the "Relation To Client" dropdown (set to "Self"), "First Name" (Inquiry), "Last Name" (Testy), "Call Back" ((808) 867-8309), "Start Date" (05/21/2023), and "Start Time" (12:08 PM) with a "Now" button. The "Client Information (Potential)" section includes fields for First Name (Inquiry), Middle Name, Last Name (Testy), Client ID, Sex (Male), SSN, DOB, Home Phone, Cell, Email, Address1 (1234 Main Street), Address2, City (Arroyo Grande), State (California), Zip (93420), Urgency Level (Not urgent), Inquiry type (Request for MH services), and Contact type (Face to Face).

4. Complete the information about the client.

- a. Complete the First Name and Last Name fields. Middle Name is not required but can be added if given/known.

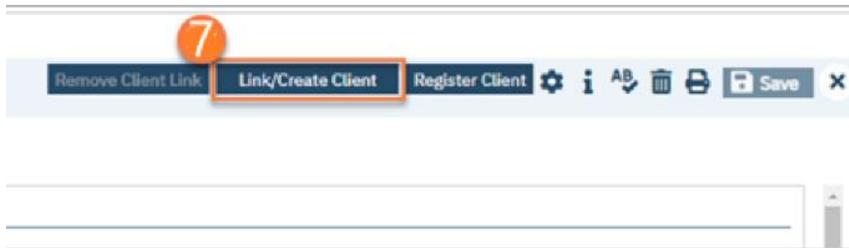
- b. Complete the SSN and DOB fields. If the client refuses to share, or does not know, you can simply check the box “SSN Unknown/Refused.” Once saved, this will fill in the SSN with “999999999”, which is SmartCare’s version of “no SSN”.
- c. Complete the Sex field.
- d. Complete the Urgency Level (Urgent), Inquiry type (Request for MH services), and Contact type (method of contact) fields. The options for each field are listed in the tables below. This includes a description of when to use each option.
- e. Complete address.
- f. Click Save.

Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition Coordination	Use when the reason for the call is for another provider to coordinate transition of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

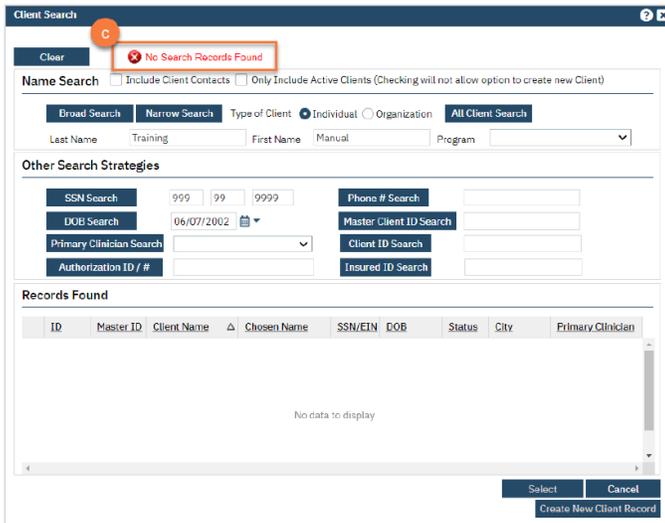
Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

5. Select the “Link/Create Client” button. This will bring up the client search window, with a few extra buttons at the bottom.

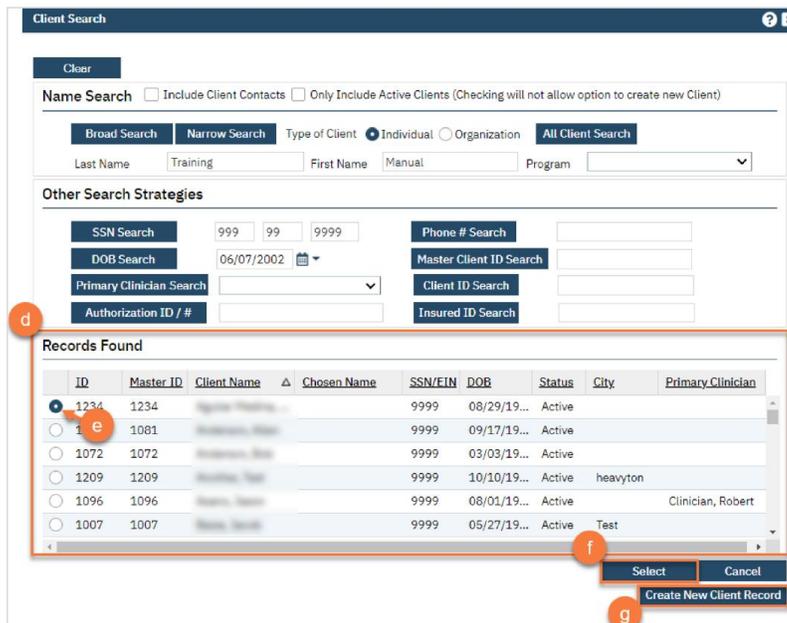


- a. You must search by name by clicking on either “Broad Search” or “Narrow Search”.
- b. You must also search by SSN and DOB by clicking on those respective buttons.

- c. If no records are found based on the search you do, an alert will show at the top of the window.



- d. Any search results will show in the “Records Found” area. Review the Records Found to determine if the person is already in the system as a client.
- e. If the person is already a client in the system, select the button next to the appropriate record.
- f. Click “Select” to link the Inquiry to the selected client.
- g. If the person is not a client, meaning no records were found matching the client’s information, click “Create New Client Record.”



h. This will take you back to the Inquiry screen but now a client ID number will be added.

The screenshot shows the 'Inquiry Details' form with the 'Demographics' tab selected. The 'Client ID' field is highlighted with a red box and a circled 'h'. The form contains the following information:

- Inquirer Information:** Relation To Client: Self, First Name: Manual, Middle Name: , Last Name: Training, Call Back: (916) 555-7878, Start Date: 02/06/2023, Start Time: 5:16 PM.
- Client Information (Potential):** First Name: Manual, Middle Name: , Last Name: Training, Client ID: 1239, Sex: Male, SSN: 999999999, DOB: 05/07/2002, Age (20 Years), Home Phone: (916) 555-7878, Cell: , Email: , Urgency Level: Not urgent, Address1: , Inquiry type: Request for services/screening, Address2: , Contact type: Call, City: , Priority Population: , State: , Zip: , County of Residence: Search here, Presenting Problem: , Current Client Information (If any): Client Id: 1239, Last Inquiry Date: , Coverage History: No Coverage History.

6. Click on the “Insurance” tab.

a. Select “Medi-Cal” from the “Payer” drop-down and enter the client’s Medi-Cal number (CIN) in the “Insurance ID” field. Click “Verify” to verify the client’s Medi-Cal insurance.

The screenshot shows the 'Inquiry Details' form with the 'Insurance' tab selected. The 'Payer' dropdown is set to 'Medi-Cal', and the 'Insurance ID' field is highlighted with a red box and a circled 'a'. The form contains the following information:

- Electronic Eligibility Verification:** Payer: Medi-Cal, Insurance ID: , Verify...
- Coverage Information:** Show Current Plans Only: . Table with columns: Plan, Insured ID, Group ID, Comment. Add button.

- b. The Insurance Eligibility Verification screen opens. Click Submit Request.

Click the Update Coverage button to automatically update the client’s Medi-Cal coverage.

Info	Coverage Level	Service Type	Insurance Type	Benefit Entity Name	Plan Coverage Description	Group Policy Name	Start Service Date	End Service Date	Commercial Insurance Name	Network	Co Insurance	Co Pay amount	Deductible	Out of Pocket	Message 1	Message 2	Message 3

- c. Click the Response tab to view and/or print the response. Scroll down to view additional benefits and client information.

Info	Coverage Level	Service Type	Insurance Type	Benefit Entity Name	Plan Coverage Description	Group Policy Name	Start Service Date	End Service Date	Commercial Insurance Name	Network	Co Insurance	Co Pay amount	Deductible	Out of Pocket	Message 1	Message 2	Message 3
Co-Payment	Individual	Urgent Care													Copy \$6.66 between \$2.00-\$10.00, Copy \$1.00 between		
Deductible	Individual	Health-Benefit Plan Coverage										\$0			\$12.00-\$28.00, Copy \$2.00 between \$29.00-\$98.00, Copy \$1.00 above \$98.00		

Additional Subscriber Information  
 Gender: Male  
 DOB: 19650214  
 Patient ID: 123456789  
 Informational Contact: [Link]  
 Sub-Applicant Information  
 Payer Name: Medi-Cal  
 Payer ID: 60331  
 Informational Receiver: [Link]  
 Provider ID: M78543211  
 Provider Secondary ID: [Link]

- d. Click close to exit this screen.
- e. Additional insurance information can be added in the Plan field in the Coverage Information section.

- f. Click Add. Select the plan from the drop-down and enter in Insured ID#.
- g. Click Save.

The screenshot shows the 'Inquiry Details' form with the 'Insurance' tab selected. The 'Coverage Information' section contains a table with the following columns: Plan, Insured ID, Group ID, and Comment. An 'Add' button is located at the bottom right of the table. A red box highlights the 'Add' button, and another red box highlights the 'Insured ID' field. A red circle with the number '8' is in the top right corner of the form.

7. Click on the “Demographics” tab

- a. We recommend completing the “Gender Identity” and “Pronoun” fields to ensure the person is not misgendered as additional staff engage with the client.
- b. Complete the “Primary/Preferred Language” field. If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.
- c. If the client has any transportation issues and will need transportation to and/or from appointments, check the Transportation Service checkbox.
- d. Click Save.

The screenshot shows the 'Inquiry Details' form with the 'Demographics' tab selected. The 'Identifying Information (Optional)' section has three dropdown menus: Gender Identity, Pronoun, and Sexual Orientation. The 'Language' section has a Primary/Preferred Language dropdown menu set to 'English', and two checkboxes: 'Client does not speak English' and 'Interpreter Services Needed'. The 'Transportation Information' section has a checkbox for 'Transportation Service' and a text area for 'Note any special needs accommodations (e.g. wheelchair, service animal, high rise)'. A red box highlights the 'Save' button in the top right corner. A red box highlights the 'Gender Identity' and 'Pronoun' dropdown menus. A red box highlights the 'Primary/Preferred Language' dropdown menu and the two checkboxes. A red box highlights the 'Transportation Service' checkbox and the text area.

8. Go back to the Initial tab and enter in your program and location of screening. Select the end date (Today) and end time (Now) and change status from in progress to complete. Click Save and X to close.

NOTE: take note of the Client ID# so you may enter when opening client record.

**Inquiry Handled By** ⓘ

Recorded By: Seaman, Kimberly | Information Gathered By: Seaman, Kimberly

Program: SLO Clinic MD Urgent Care (1451) | Gathered By Other: | Location: Office | Assigned To: |

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**Disposition**

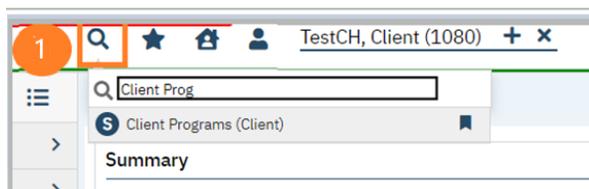
Select Disposition: | Select Service Type: | Select Provider/Agency: | Add Provider: | Add Service Type: |

Assigned Staff: | Assigned WorkGroup: | Disposition Comments: | Add Disposition: |

End Date: 07/08/2023 | End Time: 09:03 AM | Now | Status: Complete |

## Enroll client in your program

1. With the client open, go to search bar and type in **Client Programs (Client)**.



Client Programs (0) ⓘ ⚙️ ⭐ ⬇️ 📄 ✕

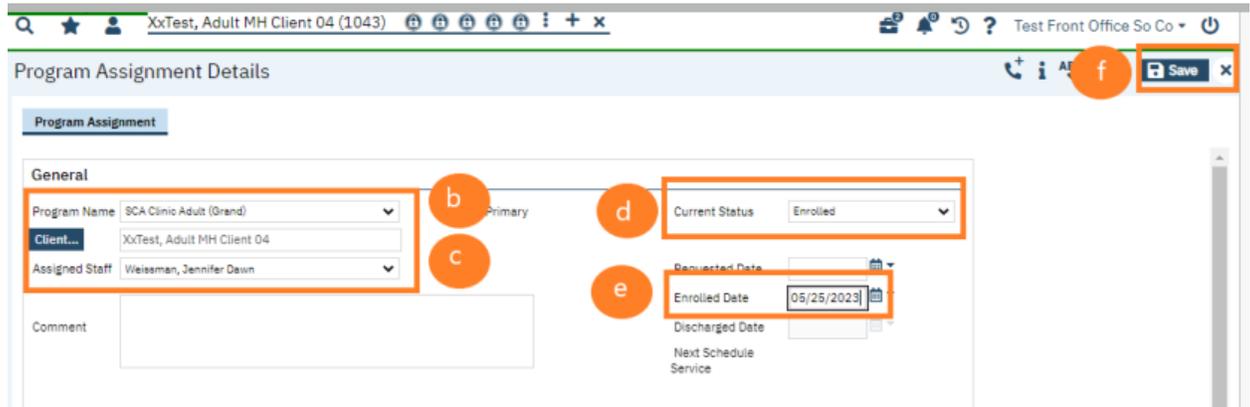
All Programs: | All Statuses: | Other: | Apply Filter

Program	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
No data to display							

a

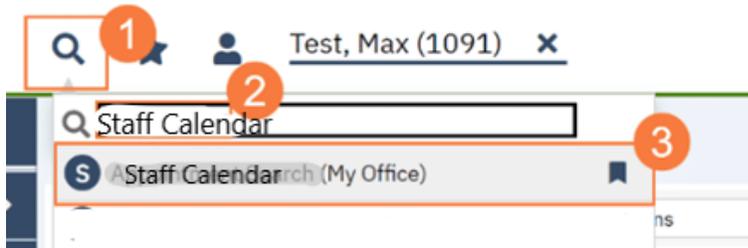
- g. Click new.
- h. In the Program Name field, select the UCC program.
- i. In Assigned Staff, select the staff member client will be seeing.
- j. In Current Status field, select “Enrolled”.
- k. Enter in Enrolled Date.

- I. Click Save and X to close.

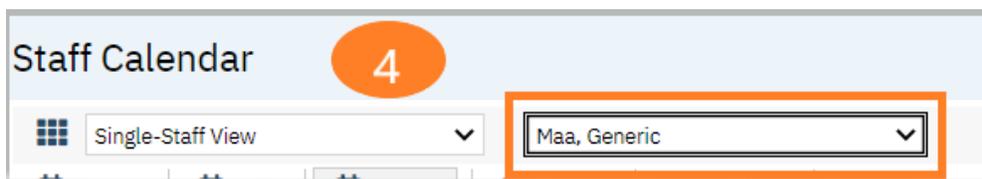


## Add Client to Staff's Schedule

1. With the client open, Click the Search icon.
2. Type **Staff Calendar** in the search bar.
3. Click to select **Staff Calendar (My Office)**



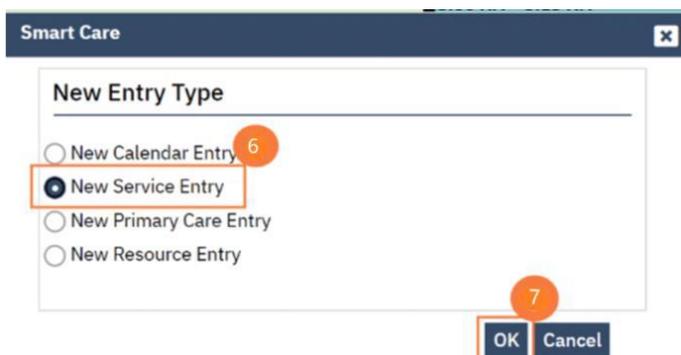
4. Select the staff you want to schedule for.



5. From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book. Note: If you are trying to schedule a time that has an available appointment spot indicated in the staff's calendar, you will need to click and drag your mouse in the white area next to the color block.



6. In the New Entry Type pop-up, select the New Service Entry radio button.



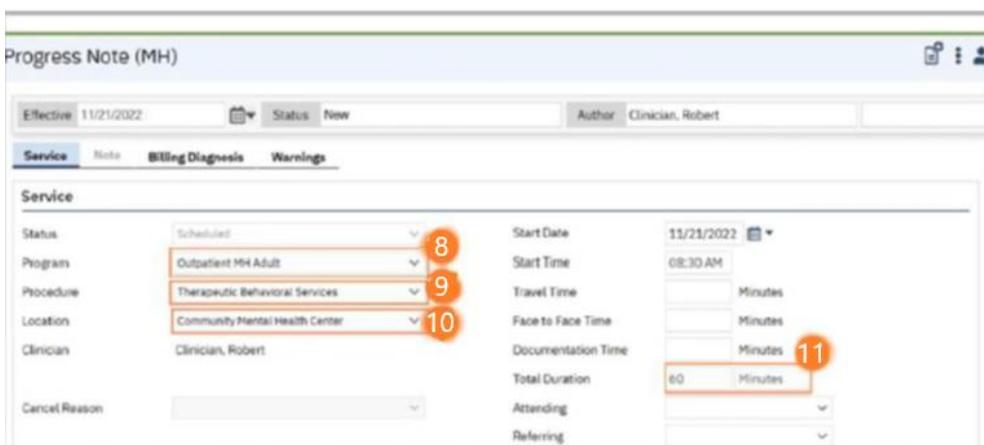
7. Click OK.

8. In the Service Notes screen, click the drop-down menu in the Program field and select the appropriate program.

9. Click the drop-down menu in the Procedure field and select the appropriate procedure.

10. Click the drop-down menu in the Location field and select the appropriate location.

11. Click in the Total Duration field and enter the duration of the appointment.



12. Click the Save icon. Click the X icon to close the screen.

