

## How to Associate A Progress Note with a Document

After the Program Supervisor, or designee, has reviewed a document or progress note in SmartCare, the Program Supervisor will complete a nonbillable service must document progress note to document the site authorization team determination. The Program Supervisor, or designee, will attach this Progress Note to the completed document or progress note by:

1. Open Documents List page

The screenshot shows the SmartCare interface. The top navigation bar includes the SmartCare logo, a search icon, a star icon, a user icon, and the text "Mh Client, Fictional A (400001)". The left sidebar contains a list of navigation items: ANSA Reporting List Page, ASAM Reporting List Page, Client Activity Tracker, Compliance SUD Batch List Page, My Office, Primary Sync, Client (highlighted), Program, Administration, Provider, Client Funds, Service Note, and SmartLinks. The right pane shows the "Dashboard" section with a "Tracking Widget" and a "Documents" list. The "Documents" list is highlighted in yellow. The "Documents" list table has columns: Document/Description, Group Name, Effective, Status, Ver., Due Date, Author, To Co-Sign, Others to Sign, Shared, and Associated Documents. The first row in the list is "CaAIM Assessment" with a value of "Add" in the "Associated Documents" column.

2. Find the document/progress note on the document list page and click **Add** under Associated Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
CaAIM Assessment		08/07/2023	Signed	1		Getten, Amanda Marga.			Yes	Add

3. Click **Add** next to the non-billable service must document progress note you would like to associate with the CalAIM Assessment, verify the progress note is listed below on the List of Associated Documents, and click **OK**

**Associate Documents** ?

Associate Documents (83) OK Cancel

**Documents** **Preview**

All Clinicians ▼ All Documents ▼ All Statuses ▼ Apply Filter

Effective From: 08/07/2022 📅 Effective To: 📅

<span>Add All</span>	Document	Effective	Status	Author
<span>Add</span>	Progress Note	08/07/2023	Signed	Getten, Amanda Margaret
<span>Add</span>	CalAIM Assessment	08/07/2023	Signed	Getten, Amanda Margaret
<span>Add</span>	Nutritional Screening	08/07/2023	Signed	Nibbio, Joanne Marie
<span>Add</span>	Pain Assessment	08/07/2023	Signed	Nibbio, Joanne Marie
<span>Add</span>	Transition of Care (CalMHSA)	08/04/2023	Signed	Getten, Amanda Margaret
<span>Add</span>	Progress Note	08/03/2023	Signed	Carlisle, Daniel
<span>Add</span>	Progress Note	08/03/2023	Signed	Masters, Amanda
<span>Add</span>	Progress Note	08/03/2023	Signed	Benadiba, Pamela Ann
<span>Add</span>	Release of Information	08/02/2023	Signed	Nibbio, Joanne Marie

**List of Associated Documents**

	Document	Effective	Status	Author
<span>✕</span>	Progress Note	08/07/2023	Signed	Getten, Aman...

Now, you will see this Progress Note and be able to click on the hyperlink to the Progress Note from the Documents List Page:

Documents (93) Create Document...

All Authors... ▼ All Documents ▼ All Statuses ▼ Due in X days ▼ Other ▼ Apply Filter

Last 1 Year ▼ ☐ Include errored documents From 08/07/2022 📅 To 08/07/2023 📅 ☐ Include External Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Progress Note / Client Non Billable Svc Must Docu...		08/07/2023	Signed	1		Getten, Amanda Marga			Yes	<a href="#">Add</a>
Pain Assessment		08/07/2023	Signed	1		Nibbio, Joanne Marie			Yes	<a href="#">Add</a>
Nutritional Screening		08/07/2023	Signed	1		Nibbio, Joanne Marie			Yes	<a href="#">Add</a>
CalAIM Assessment		08/07/2023	Signed	1		Getten, Amanda Marga			Yes	<a href="#">Progress Note</a>