I:\HealthInformation\SmartCare Migration

Above is where your excel sheet is for 6-26-23 to 6-30-23

Enter Client into SmartCare – When creating a client that is in AZ, doc AZ# in Alias

Client Search
Enter last name and first name.
Click Broad Search.
Enter SSN. Click SSN Search.
Enter DOB. Click DOB search.
If not in SmartCare, click Create New Potential Client button.
Answer Yes to creating new client.

Client Information Screen (automatically opens after you have created a new client in SmartCare.)

Enter all information in the General tab, Alias tab, Demographic tab, and Contacts tab. Once done, click Save and X to close.
If the client is a minor, make sure to add parent/guardian information in the Contacts tab. Ensure to check the financially responsible box, as well as guardian and/or household member boxes.
If client was previously in AZ- In the alias tab, enter the AZ # as last name, AZ as first name and check allow search button. Click Save and X to close.

Enroll in Program

With the client open, go to search bar and type in Client Programs (Client).
Click new.
In the Program Name field, select the program for your site.
In Assigned Staff, select the staff member client will be seeing. Right now, the LPT will need to be designated (if client is open to therapist & LPT) as LPT is not available option in the Treatment Team
In Current Status field, select "Enrolled".
Enter in Enrolled Date (same date as AZ admit date/SAT date).
Click Save and X to close.

Assign Treatment Team

With the client open, search Treatment Team and select Treatment Team (Client).
Click New icon.
Select radial button next to staff.
Enter Start Date (same date as AZ admit date/SAT date), Staff, Role, and Program.
Click Save and X to Close.

Enter Coverage

With the client record open, search Coverage**.** Select Coverage (Client).
Click on the New icon to add a new Plan.
These fields are required when entering a new plan:
Plan – Select from the dropdown menu.
Insured ID – Enter Insured ID
Client Is Subscriber
The Client is Subscriber radio button automatically defaults to Yes.
If the client is not the subscriber select the No radio button and select the subscriber from the dropdown list of the client's contacts.
If the subscriber has not been added to the client's contacts, select the Update Contacts button, and add the subscriber's information to the client's contacts.
Save and close.
Repeat the above steps to add additional Coverages. You will need to enter Medi-Cal info, as well as separate Medi-Cal DMCODS info.

Enter Start Date (same date that is in AZ), Service Area (add both MH & DMC for Medicare/Private Insurance; MH for Medi-Cal; and DMC for Medi-Cal DMCODS) and select Add.
The plan will now be shown in the Plan Time Spans field. If more than one insurance is listed, click the Change CBO Order button.
Verify eligibility by clicking the Verify Eligibility icon.
Click the Update Coverage button to automatically update the client's Medi-Cal coverage.

Enter UMDAP Financial Assessment

With the client record open, click the Search icon.
Type UMDAP into the search bar.
Click to select UMDAP Financial Assessment (Client).
In the Responsible Party tab, If the client is the responsible party, select the radial button next to yes and their info will auto-populate. Answer if client is Medi-Cal eligible.
If the client is not the financially responsible person, start typing in the last name of the financially responsible person and if they are listed in the contact section on the Client Information screen, their name will show. (If they are not in the contact section on the Client Information screen, you will need to add them and ensure you check the financially responsible box.) Select their name and their info will auto-populate. Answer if client is Medi-Cal eligible.
In the next tab (Third Party Information), check yes for Assignment/Release of Information obtained.
In the Financial Liability tab, enter the annual period start date from AZ.
Enter responsible person/client monthly income amount. Enter $0 for spouse and other. Enter number of dependents on income.
In the UMDAP Liability Determination tab, enter $0 in all fields in the Liquid Assets section and the Allowable Expenses section. You can use the tab button to quickly navigate through these fields.
Note: the allowable expenses section has defaulted $0 amounts, but you will need to go through each one and re-enter 0 for it allow you to sign the form.
Ensure the annual liability amount matches what is in AZ.
Note: If the client has a SOC, continue with the process of setting the UMDAP amount based on their dependents and income. The system will automatically update SOC information when the MMEF file is run each month.
In the Other Information tab, select the yes radial button next to an explanation of the UMDAP liability was provided.
Sign the form.
Remove the client signature, unless client is not FS Medi-Cal and had an UMDAP set in AZ, in which case indicate client signed on paper.
Click X to close.

Client Account Screen

Go to the search button and type in Client Account. Select Client Account (Client).
Check the "financial information is complete" box. X to close.

Consents & Release of information -Launch each form in SmartCare, complete and indicate client signed paper document

Consent to Treat
Consent for Text Communication
Consent for Telehealth
Consent for Email Communication
Release of Information

Flags/Notifications (Enter flags/notifications for any needed/missing item from intake)

Search Client Flags (Clients)
Click New.

Enter Type, Level, Program, Note, Open Date, Display Date, Due Date.
Click Insert
Save and X to close.

Scan Paper Forms

Consent to Treat
HIPAA
Text & Email Consent
Telehealth Consent
Authorization to Use/Disclose PHI
Cost Agreement
ABN
Caregiver affidavit if applicable
Audio/Video consent- if applicable
PSC- if applicable
Consent to Photo
HQ-optional for MH; required for DAS
Audio/Video consent
Criminal Justice

Add Future Appointments to Staff's Calendar (if not in SmartCare already)

With the client open, Click the Search icon.
Type Staff Calendar in the search bar.
Click to select Staff Calendar (My Office)
Select the staff you want to schedule for.
From the Staff Calendar screen, click and drag your mouse on the calendar timeslot you want to book.
In the New Entry Type pop-up, select the New Service Entry radio button.
Click OK.
In the Service Notes screen, click the drop-down menu in the Program field and select the appropriate program.
Click the drop-down menu in the Procedure field and select the appropriate procedure.
Click the drop-down menu in the Location field and select the appropriate location.
Click in the Total Duration field and enter the duration of the appointment.
Click the Save icon. Click the X icon to close the screen.