How to set your preferences so Inquiries (My Office) display upon signing in to SmartCare.

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

Step 1 & 2

1. Search for the **Preferences** screen using the search icon.

2. Type Preferences. Select **My Preferences (My Office).**

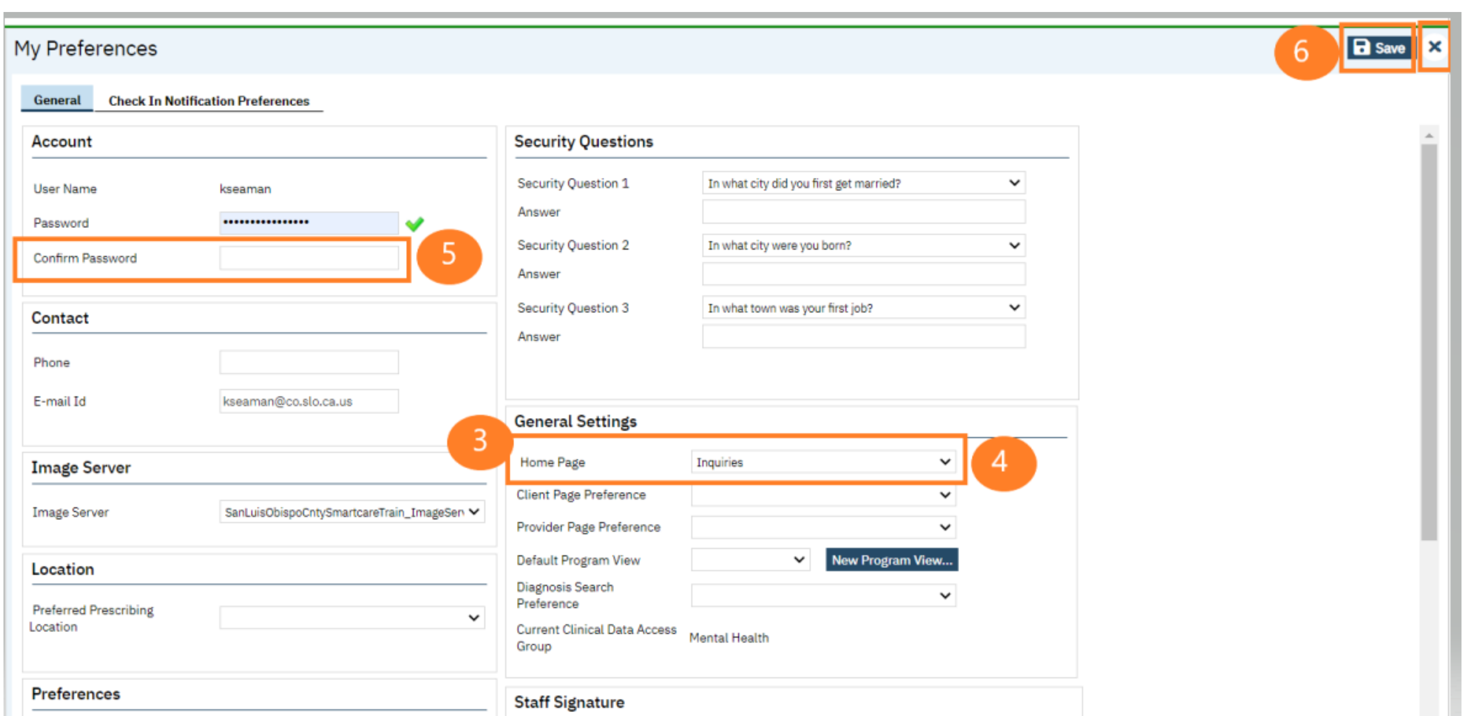
Step 3 - 6

3. Go to Home Page field under General Settings.

4. Click drop down and select Inquiries.

5. Confirm your password.

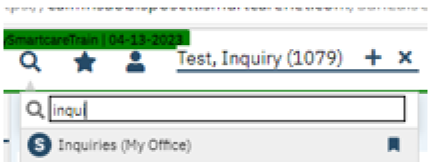
6. Click Save and X to close. In the future, upon signing in to SmartCare, the Inquiries (My Office) screen will display on your **Staff Dashboard**.



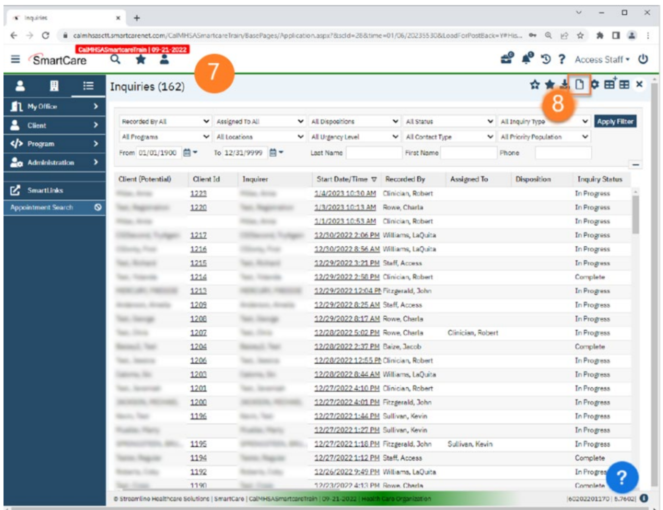
Example of Inquiry: How do I document a request for services received via the Access Line?

Step 7 & 8

7. Go to search and type in **Inquiries** and select **Inquiries (My Office).**



8. Create a new inquiry by clicking the new button.

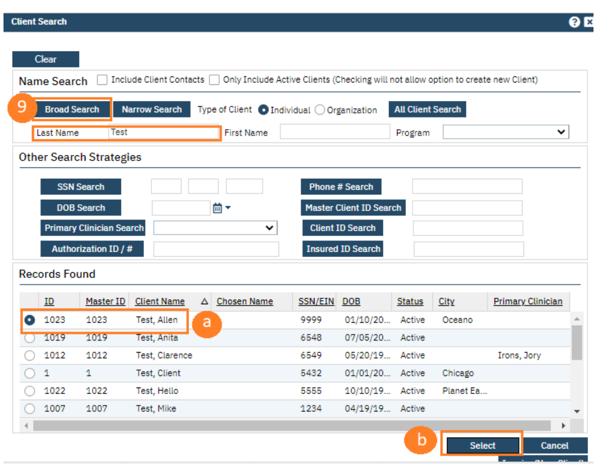


Step 9 (a-c)

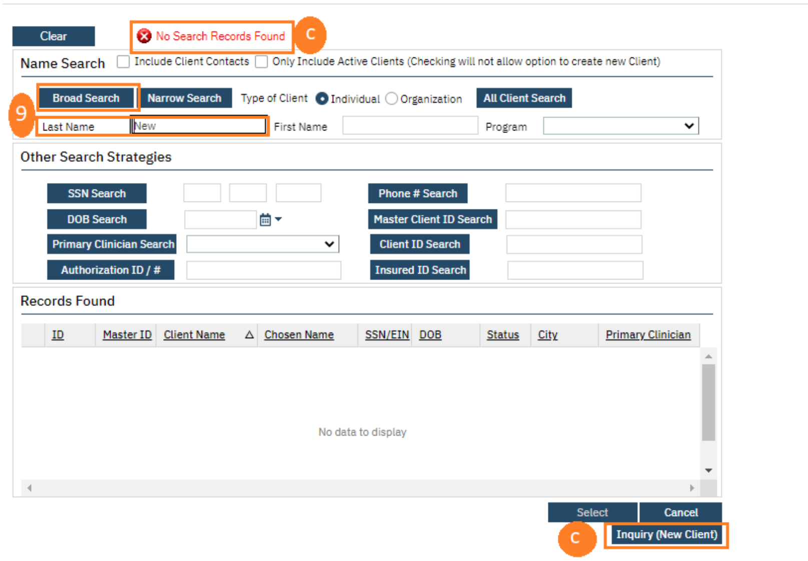
9. This will open the client search window. You may search to determine if the person is a current client.

   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, click the radial button to the left of their name, then click “Select” to bring their information into the Inquiry screen.



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



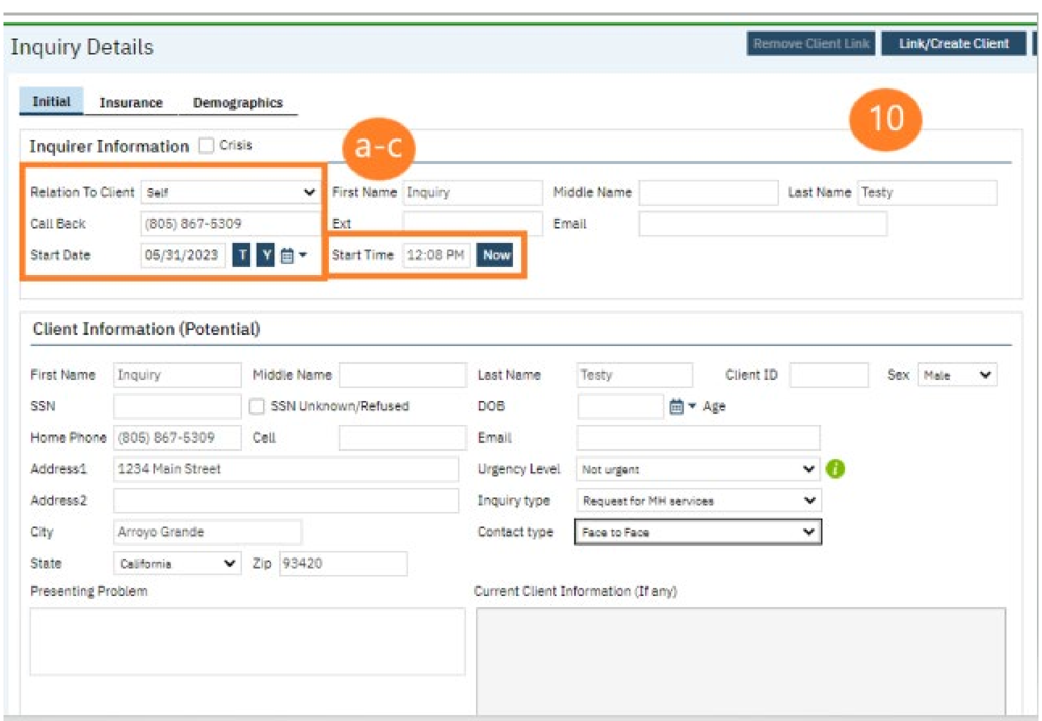
Step 10 (a-c)

10. This brings you to the Inquiry Details screen. Complete the information about the caller, or “Inquirer”.

a. If the client is calling for themselves, select “Self” under “Relation to Client.” This way, as you enter the caller’s information, it will push this information automatically into the “Client Information” section.

b. Enter the client’s call back phone number.

c. Make sure to input the start date and time of the call. There are buttons for today “T” and “Now” to help make this quick and easy.



Step 11 (a-e)

11. Complete the information about the potential client.

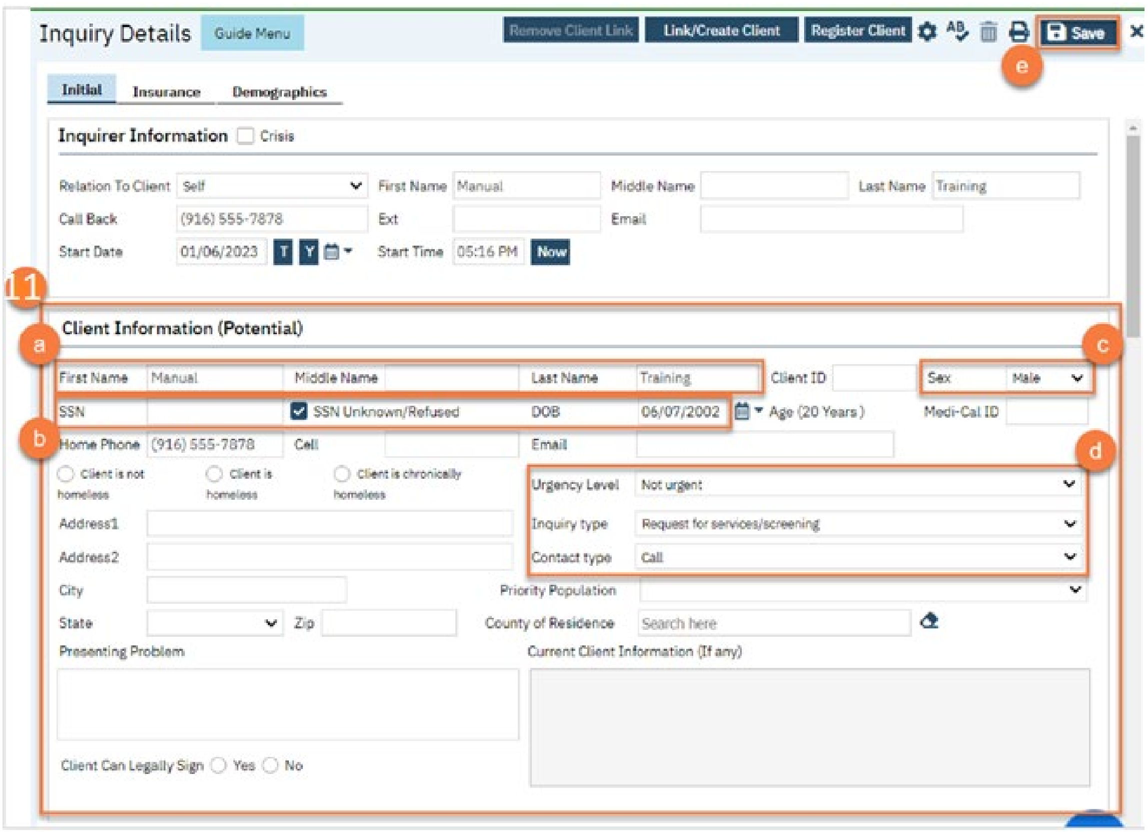
a. Complete the First Name and Last Name fields. Middle Name is not required but can be added if given.

b. Complete the SSN and DOB fields. This is for the client's social security number (SSN) and date of birth (DOB), respectively. 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, Inquiry type, and Contact type fields. The options for each field are listed in the tables below. This includes a description of when to use each option.

e. You can enter additional phone numbers and address information. Click Save when done.



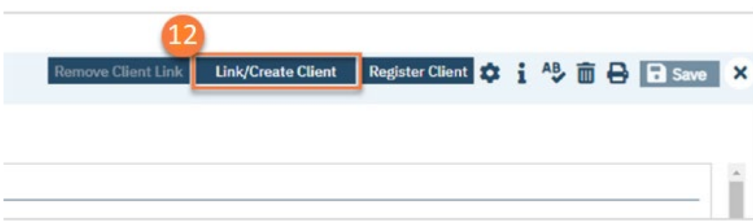
Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

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

Step 12 (a-h)

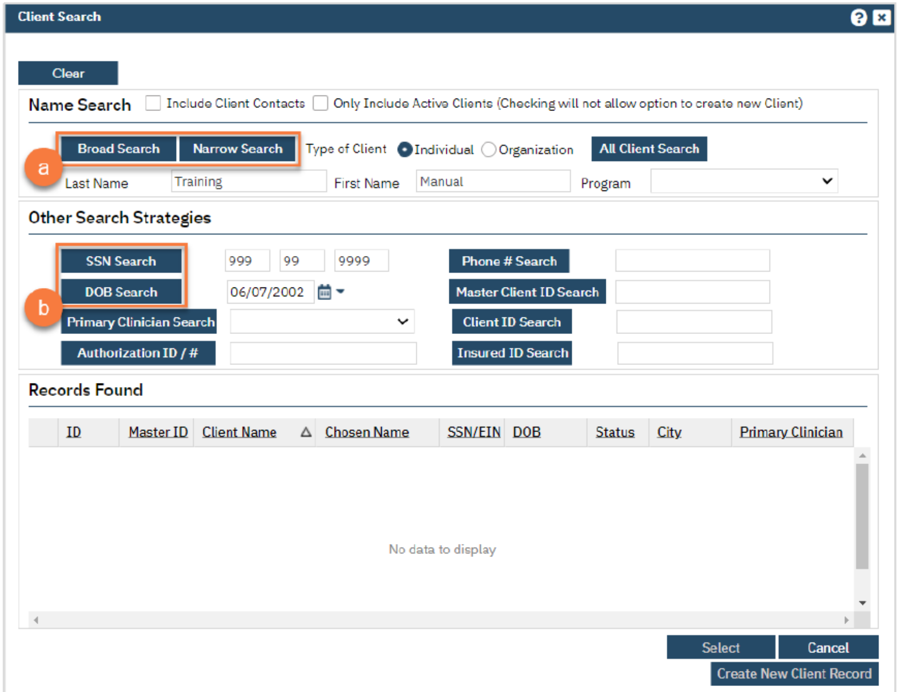
12. Select the "Link/Create Client" button. This will bring up the client search window.

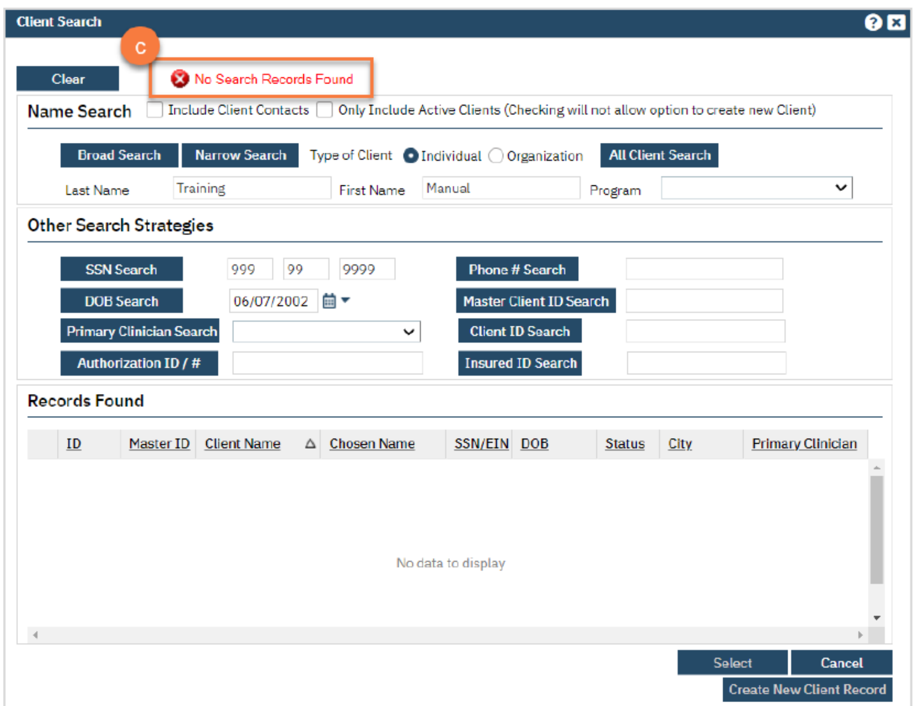


a. You must search by name by clicking on either "Broad Search" or "Narrow Search".

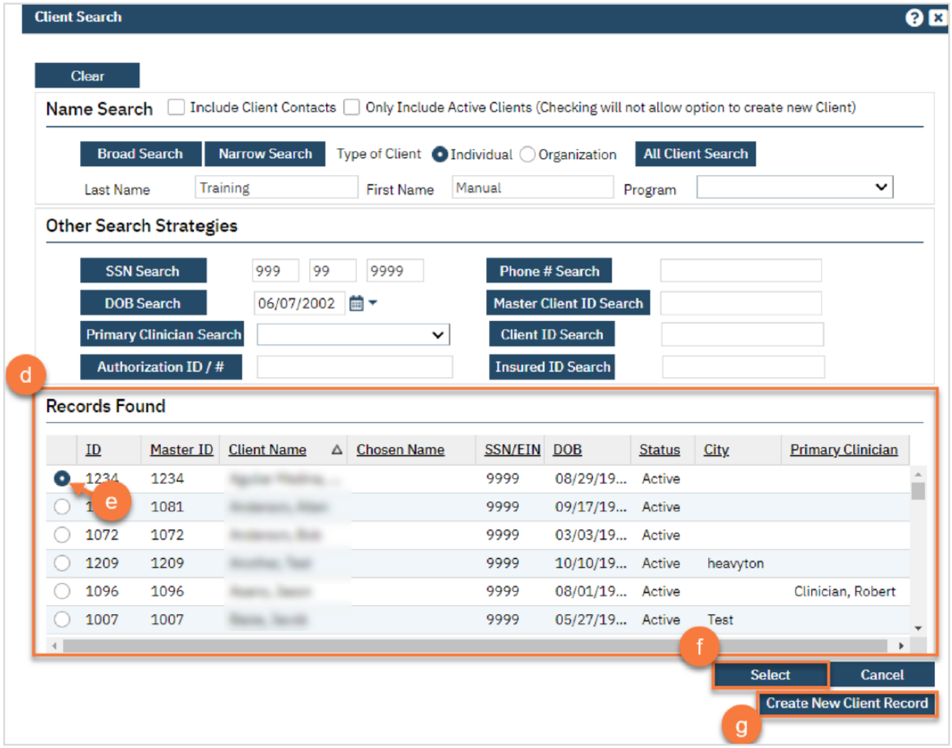
b. You must also search by SSN and DOB by clicking on those respective buttons.

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

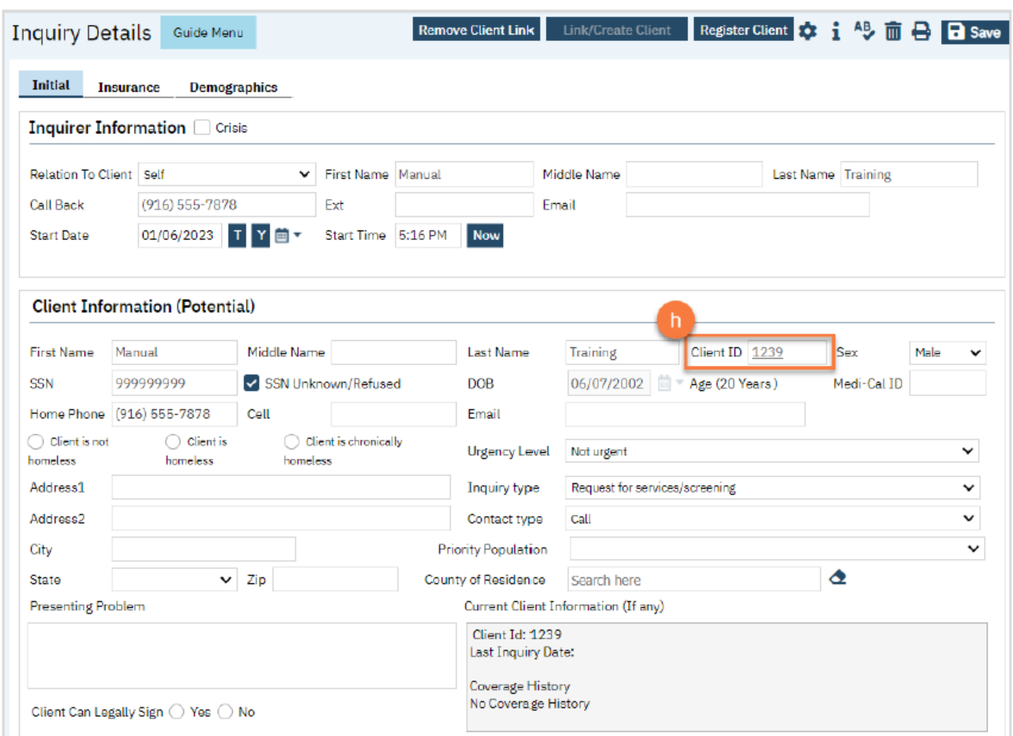




d. Any search results will show in the "Records Found" area. Review the Records Found to determine if the person is already in the system as a client.
e. If the person is already a client in the system, select the button next to the appropriate record.
f. Click "Select" to link the Inquiry to the selected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



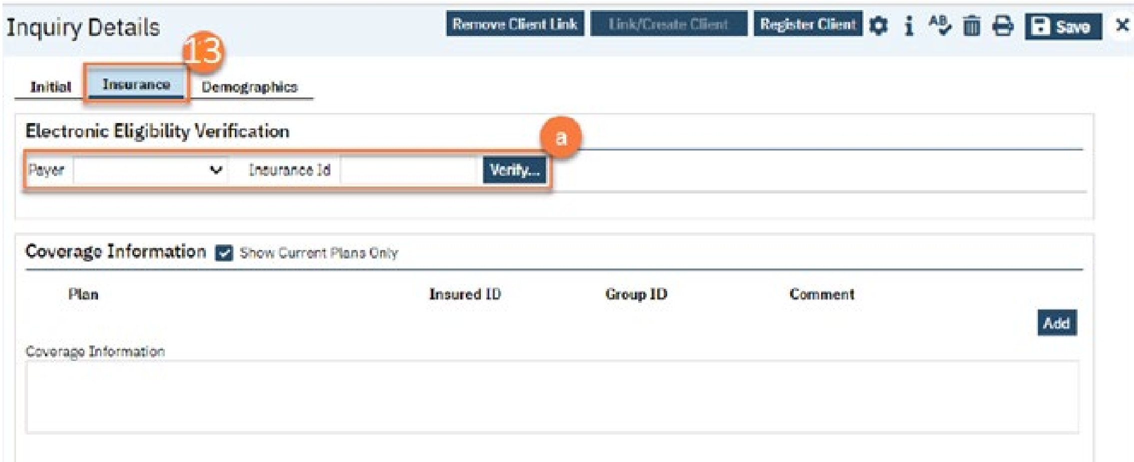
h. This will take you back to the Inquiry screen but now a client ID number will be added.



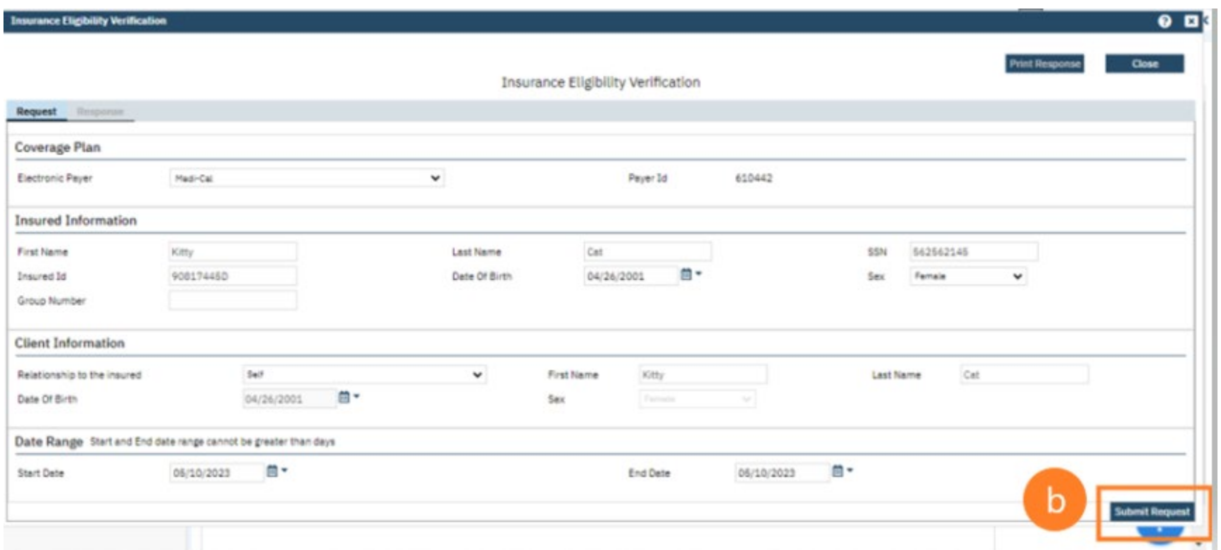
Step 13 (a - g)

13. 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.



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



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

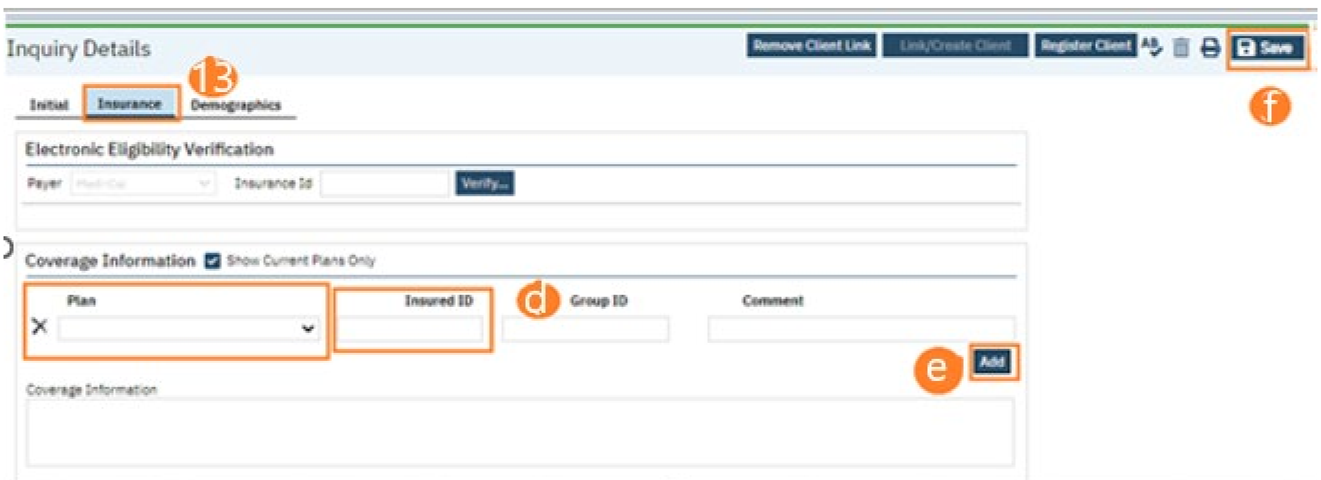
Click the Response tab to view and/or print the response. Scroll down to view additional benefits and client information. Click close to exit this screen.

Additional insurance information can be added in the Plan field in the Coverage Information section.

d. Select the plan from the drop-down and enter in Insured ID#.

e. Click Add.

f. Click Save.



Step 14 (a-c)

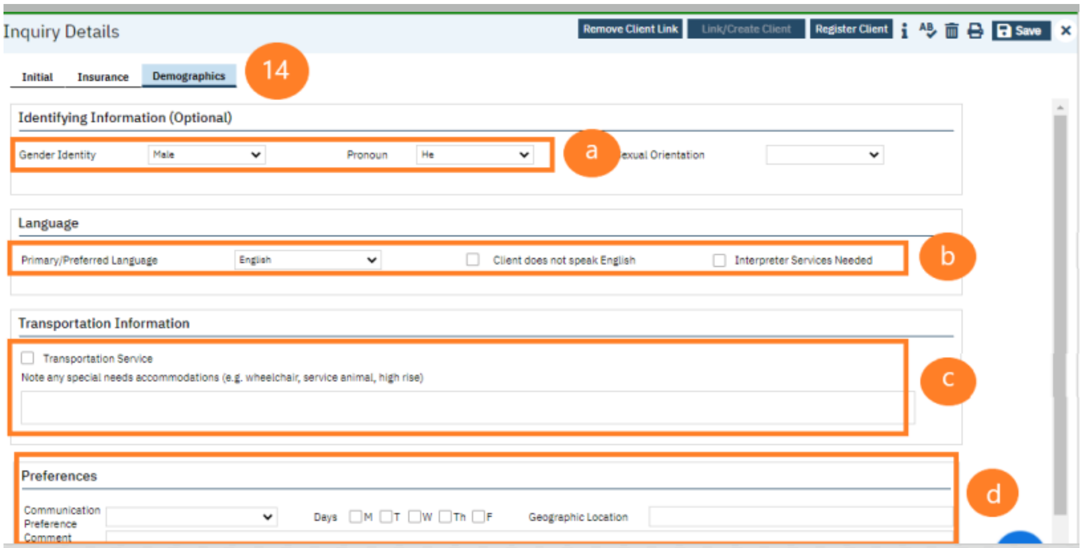
14. Click on the "Demographics" tab

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. You may enter any additional information in any of the tabs (such as communication preference, day(s) of the week availability/preferred, or location preference), but none are required.

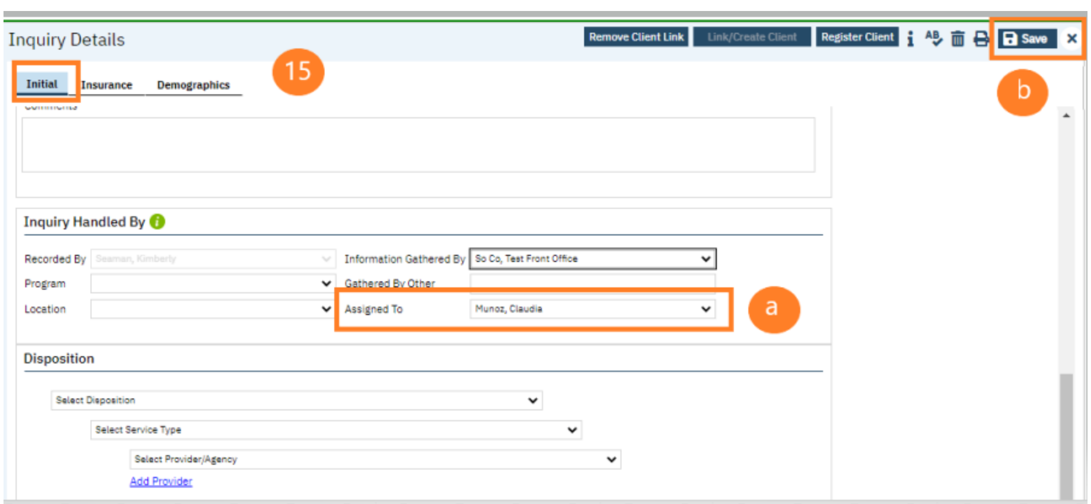


Step 15 (a-b)

15. Go back to the Initial tab.

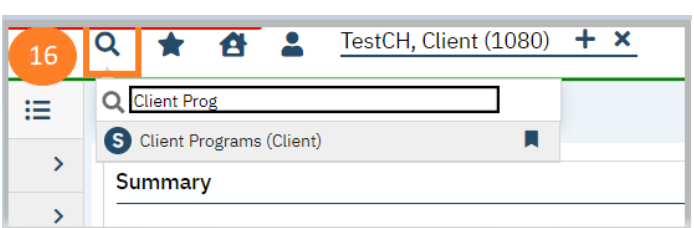
a. Assign Inquiry to BH Specialist who will be handling the screening.

b. Click Save and X to close.

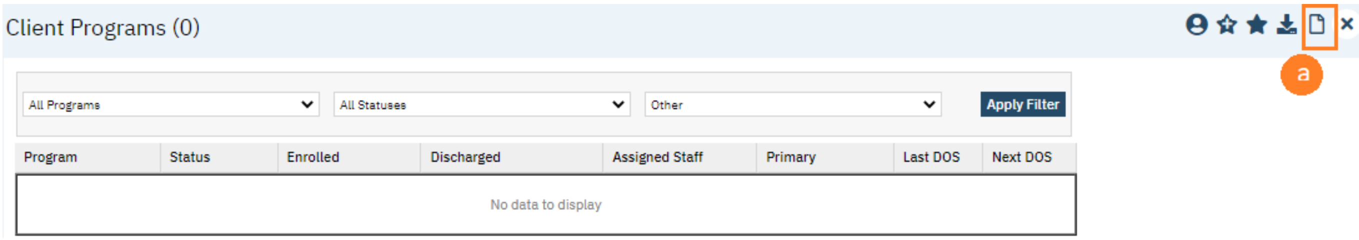


Step 16 (a-f)

16. With the client open, go to search bar. Type in **Client Programs** and select **Client Programs (Client).**



a. Click new.



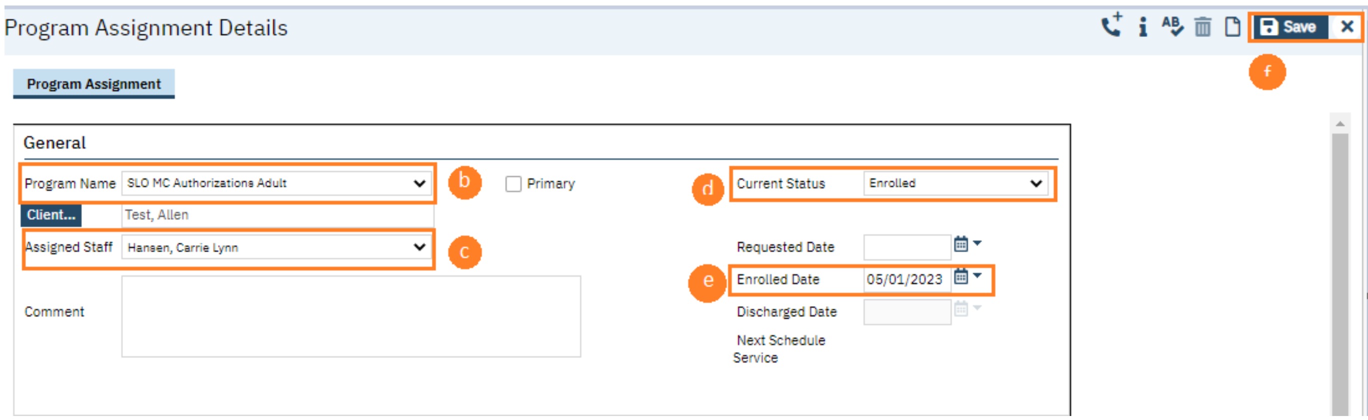
b. In the Program Name field, select “SLO MC Authorizations Adult/Youth”.

c. In Assigned Staff, select Managed Care Program Supervisor.

d. In Current Status field, select “Enrolled”.

e. Enter in Enrolled Date (same date as Inquiry).

f. Click Save and X to close.



Step 17 (a-d) (BH Specialist to complete)

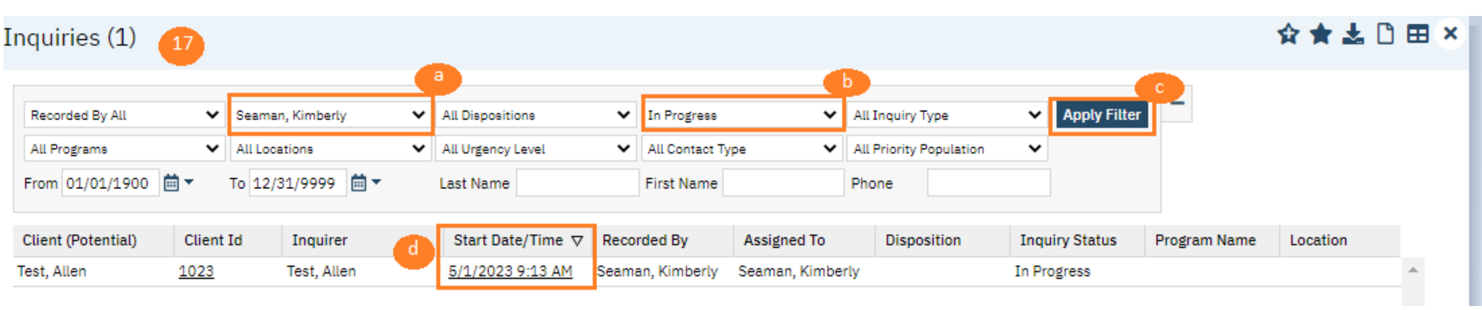
17. Go to **Inquiries (My Office)** and search for pending Inquiries that have been assigned to you for screening.

a. To see pending Inquiries that have been assigned to you, go to the “assigned to all” field and select your name from the drop down.

b. Go to the “all statuses field” and change to “In Progress”.

c. Click Apply Filter.

d. Click the Start Date/Time link to open the Inquiry.



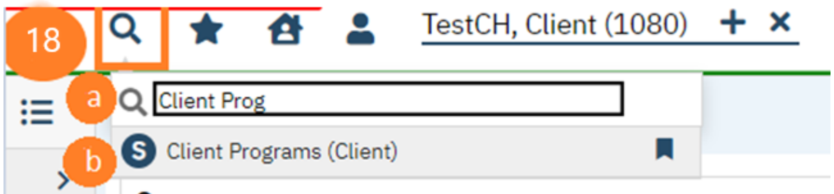
Step 18 (a-g) (BH Specialist to complete)

Once the screening clinician has completed the screening tool and caller will be moving on for services, the screening clinician will need to open the clinic intake program where they want to schedule the BH Assessment. (If an assessment appointment was offered and declined, and caller will not be moving on for services, launch the CSI Assessment Standalone. Begin and end the CSI Assessment Standalone entry with this closure reason.)

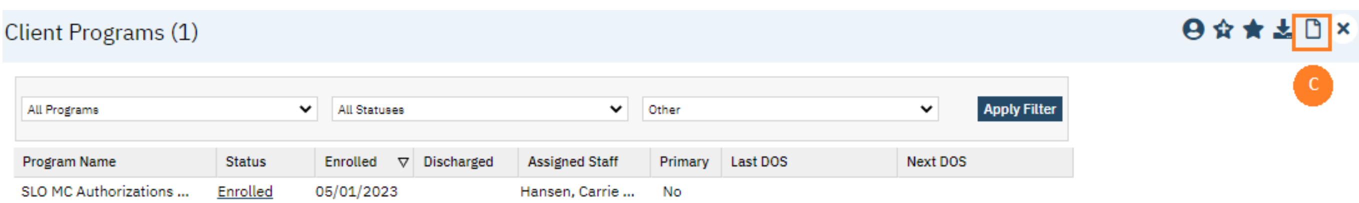
With the client open, go to the search icon.

a. Search **Client Programs**.

b. Select **Client Programs (Client**).



c. Click new.

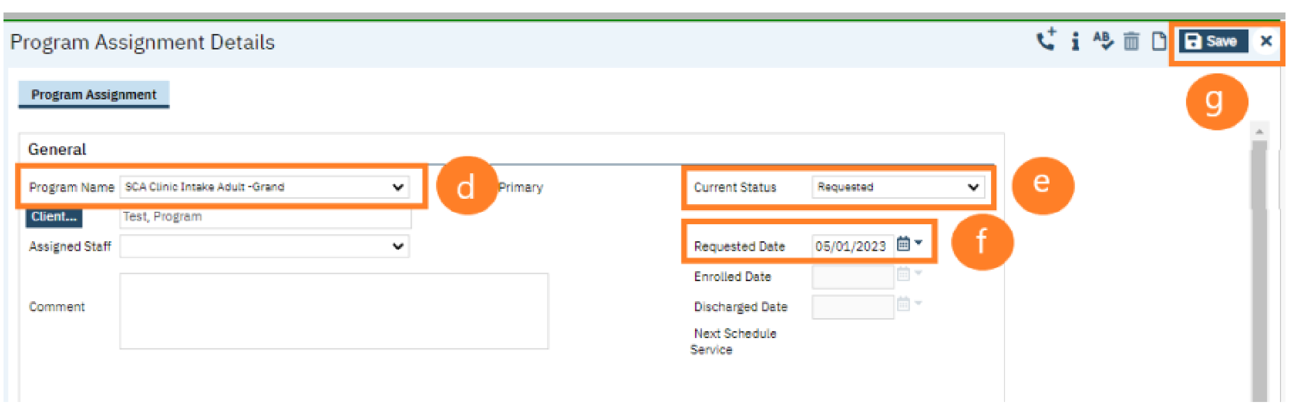


d. In the Program Name field, select the appropriate Intake program.

e. In Current Status field, select "Requested".

f. Enter Requested Date (date you are putting into intake program).

g. Click Save and X to close.



How to Add Reoccurring Events to Staff Calendar (AA function)

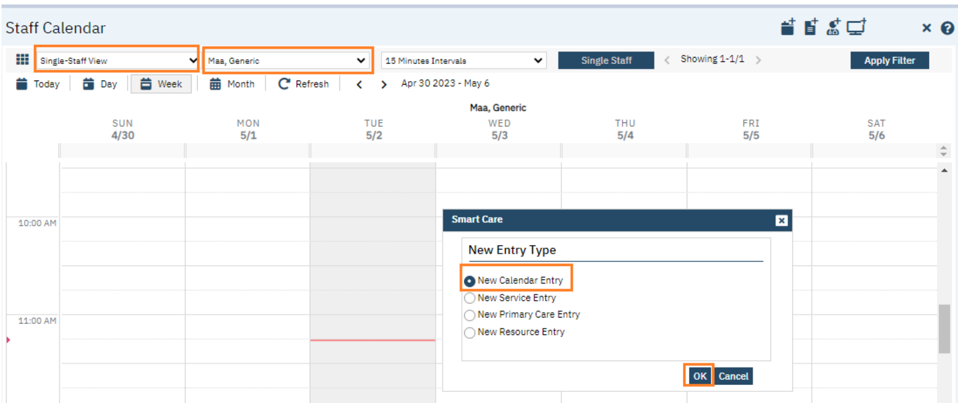
Note: this needs to be done before available appointments are shown on the Appointment Search screen.

Search **Staff Calendar** and select **Staff Calendar (My Office)**.

Select Single-Staff View and Staff.

Click and drag your mouse to the desired start date and time of the reoccurring appointment.

Select New Calendar Entry and click OK.



In this window, you need to enter the subject and the location (office or telehealth.)

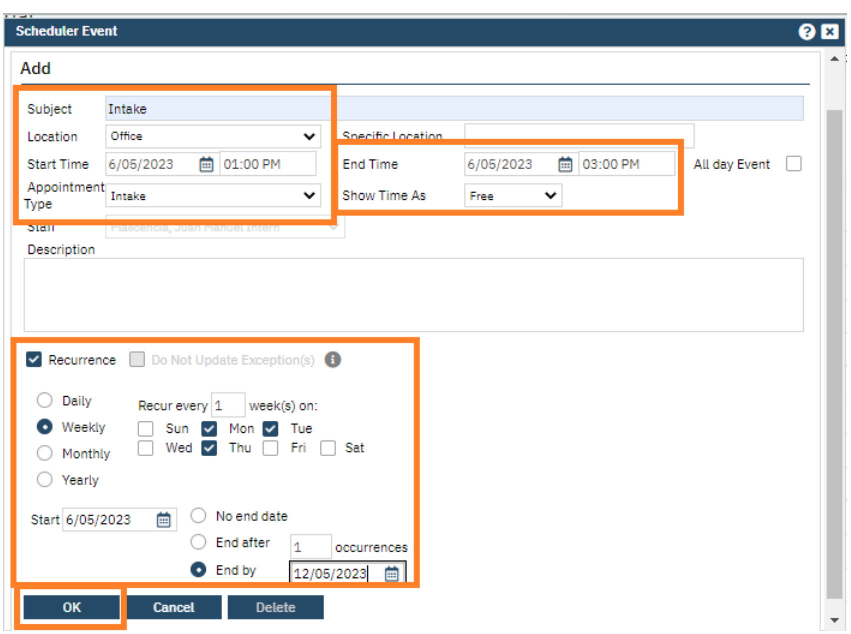
Confirm start and end times are correct.

Choose Intake as the appointment type and select Free for “show time as”.

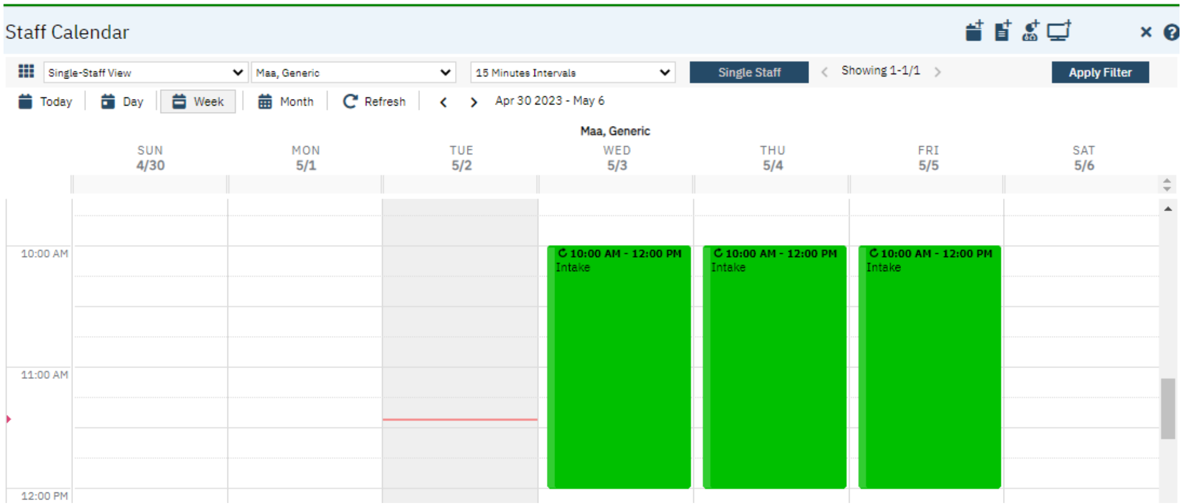
Select recurrence.

Enter the recurrence preferences. We recommend if specifying an end by date, to not go more than 6 months into the future.

Once done, click OK.



This is how it will be displayed on the Staff's calendar.



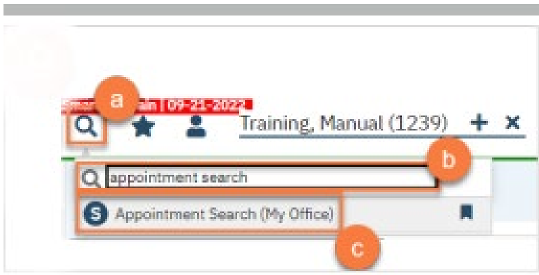
Step 19 (A-i) (BH Specialist to complete

With the client record open:

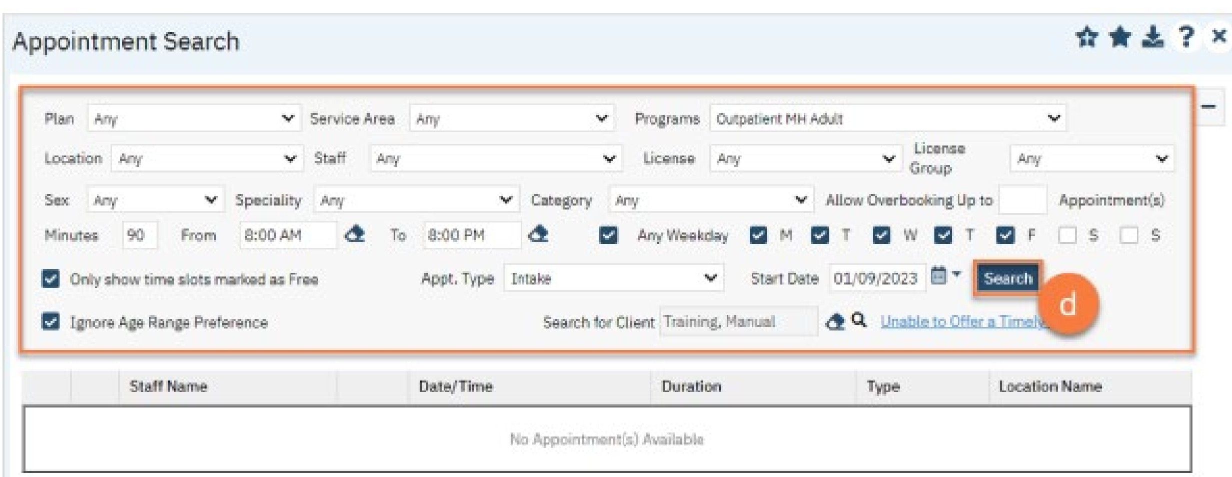
a. Click the Search icon.

b. Type **Appointment Search** into the search bar.

c. Click to select **Appointment Search (My Office).**

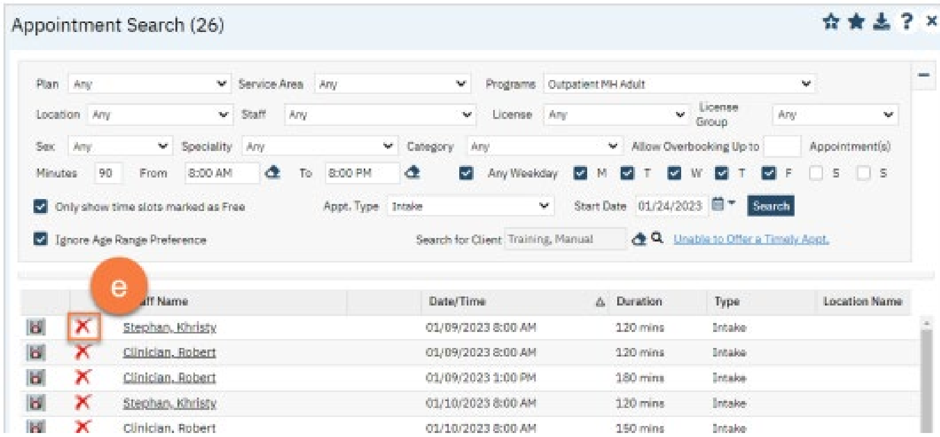


d. Use the filters to limit the search to intake appointments and any other requests the client has, such as client's availability. Then click Search.



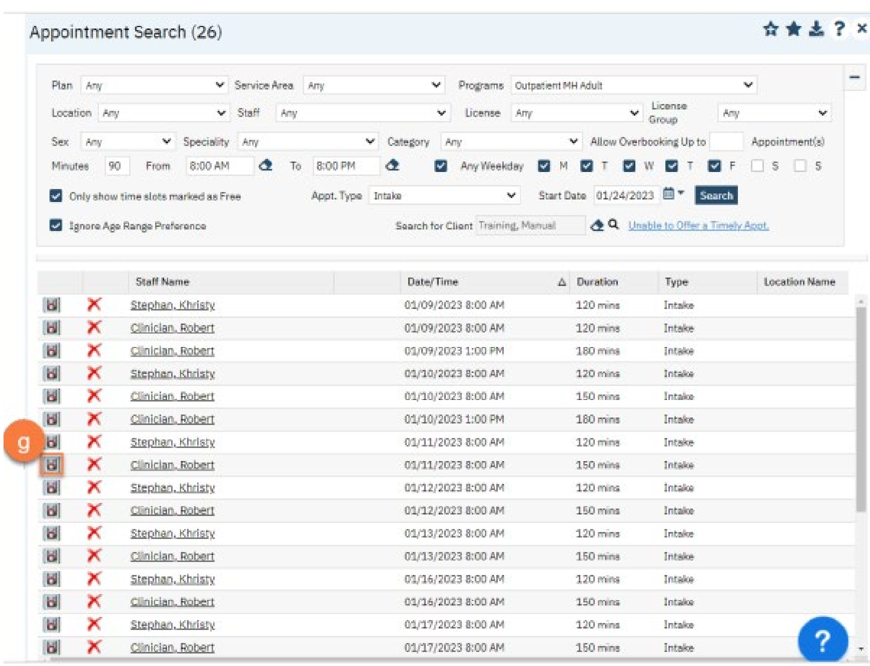
e. This will bring up a list of available appointments. If the client declines the first offered appointment, click on the X (Client Refuses Appointment) icon. This will be used for tracking timeliness.

Note: you only need to decline 1 appointment per day. In the below example, there are 3 available appointments on 1/9/23 and 3 available appointments on 1/10/23. You would only need to decline one of these appointments on each date, so you would only decline 2 total appointments, not all 6.



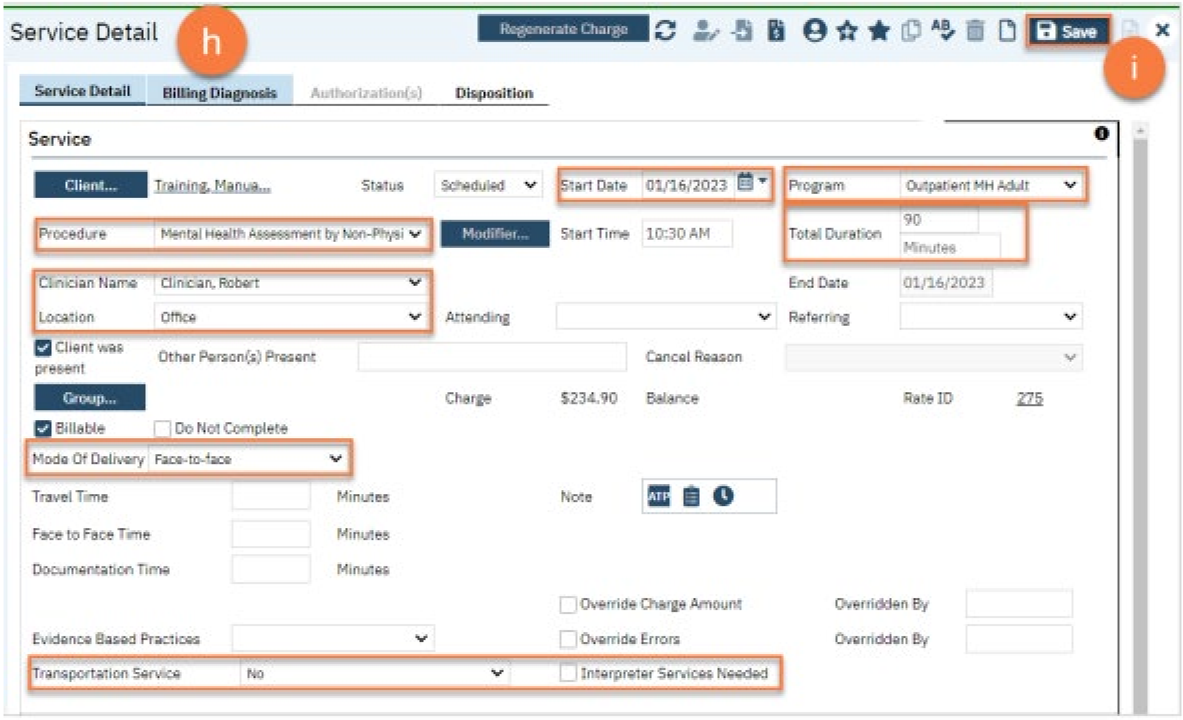
f. Clicking on the X (Client Refuses Appointment) icon will bring up a pop-up window. Enter the Refusal Reason and then click “OK”.

g. For the appointment that the client chooses, click on the “Schedule Appointment” icon.



h. This takes you to the Service Detail screen. Confirm/edit the appointment information. You can also note if the person needs transportation or interpretation services.

i. Once complete, click Save and X to close. The appointment is now scheduled.

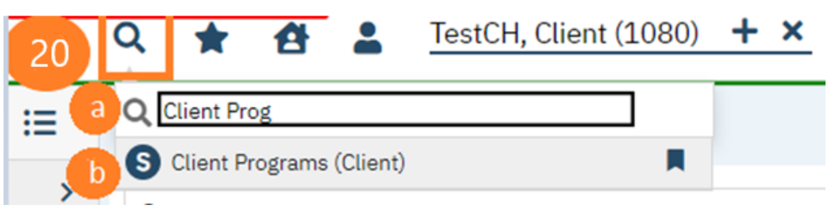


Step 20 (a-j) (BH SPECIALIST TO COMPLETE)

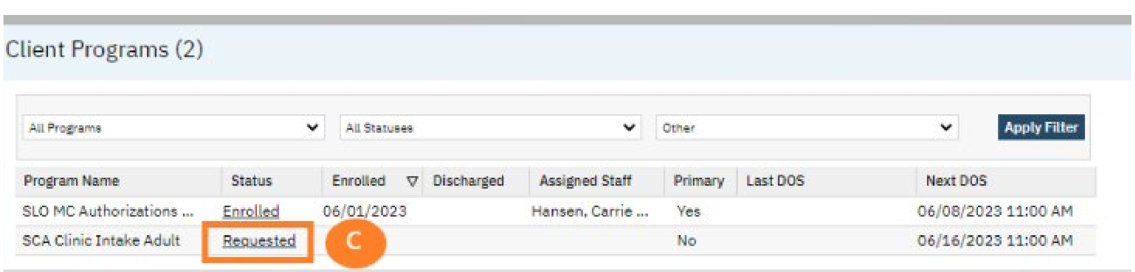
You will now need to go back to the intake program and add staff that will be performing the assessment.

a. Search **Client Programs**.

b. Select **Client Programs (Client)**.

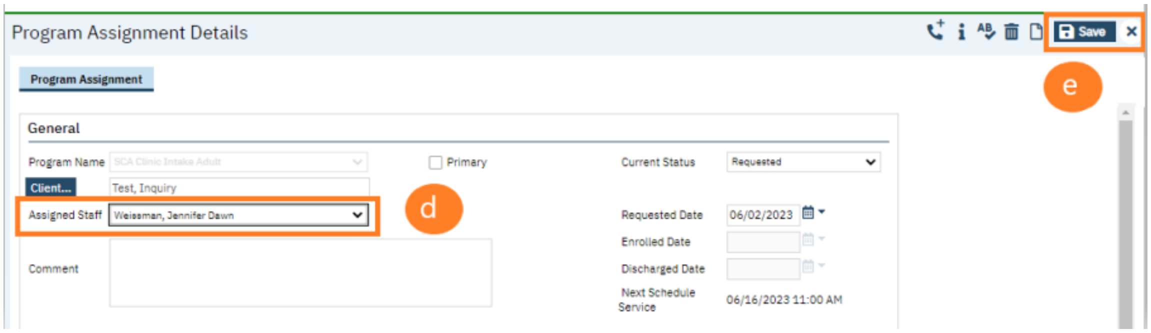


c. Find the intake program and click on the Requested link.

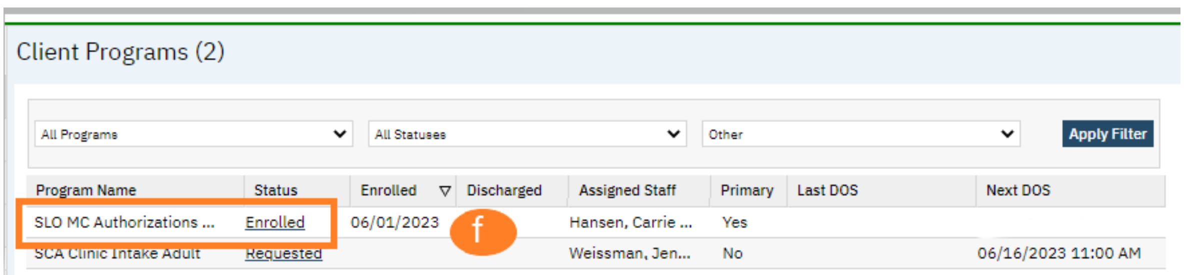


d. Enter assigned staff.

e. Click Save and X to close.



f. Next find the SLO MC Authorizations Adult/Youth program assignment and click on Enrolled link.

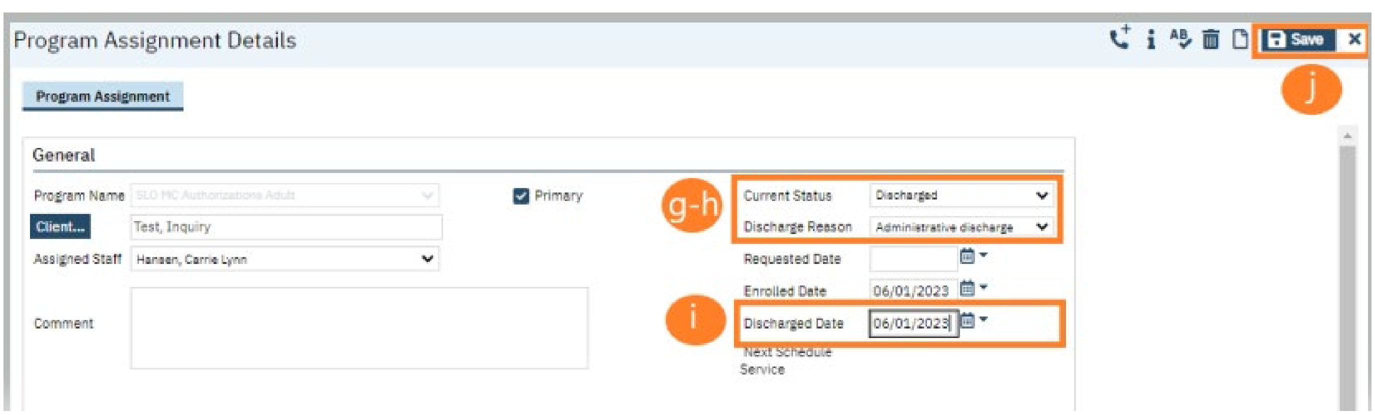


g. Change status from enrolled to discharged.

h. Enter discharge reason.

i. Enter discharge date.

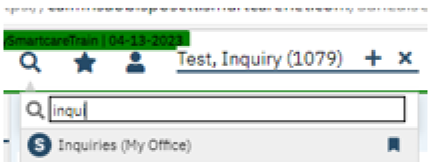
j. Click Save and X to close.



Step 21 (a-e) (BH SPECIALIST TO COMPLETE)

(If caller will be referred to CenCal, notate in the Disposition comments, remove your name from the Inquiry and assign Inquiry to MC HIT to process and end/complete the Inquiry.)

21. Go to search and type in **Inquiries** and select **Inquiries (My Office)**.



Locate and open the Inquiry. Enter any clinical information, enter in the disposition, then end and complete the Inquiry.

a. Select the program where the appointment will take place.
b. Select location of appointment
c. Enter disposition.
d. Select T for today which enters the end date. Select Now, which enters the end time. Change status from In Progress to Complete.
e. Click Save and X to Close.