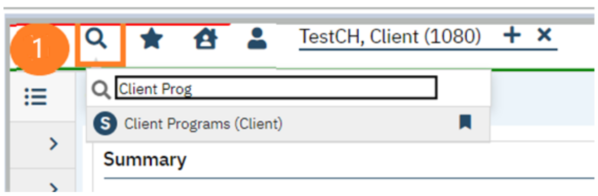
UCC How-To

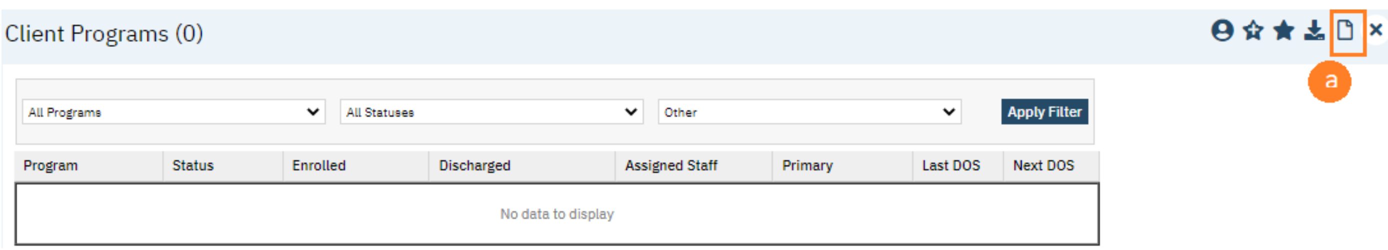
SmartCare search words in **bold** throughout this guide.

<u>For Existing/Open clients:</u>

Enroll client in UCC program

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





a. Click new.

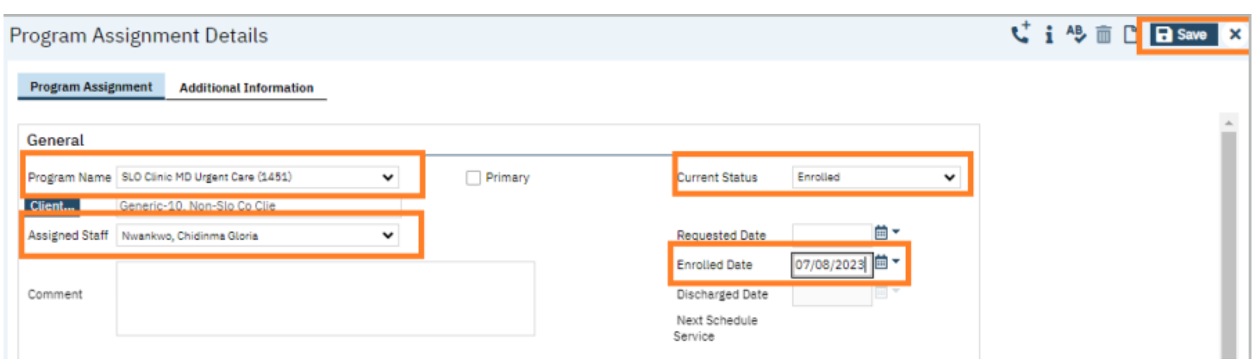
b. In the Program Name field, select the UCC program.

c. In Assigned Staff, select the staff member client will be seeing.

d. In Current Status field, select "Enrolled".

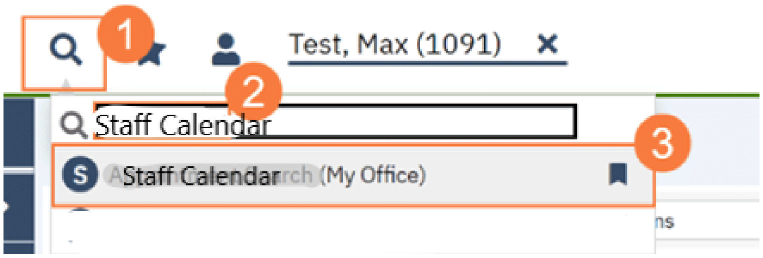
e. Enter in Enrolled Date.

f. Click Save and X to close.

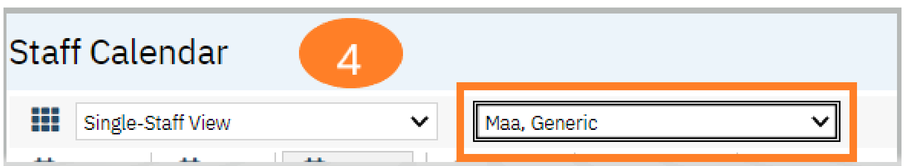


Add Client to Staff's Schedule

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)**

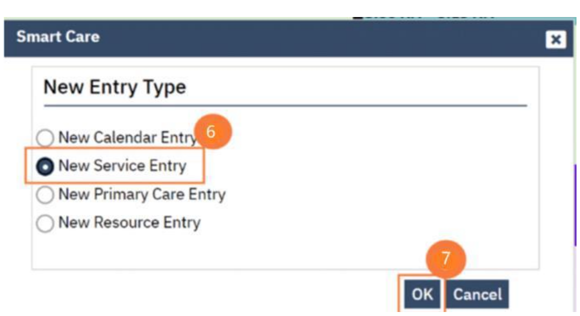


4. Select the staff you want to schedule for.



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.



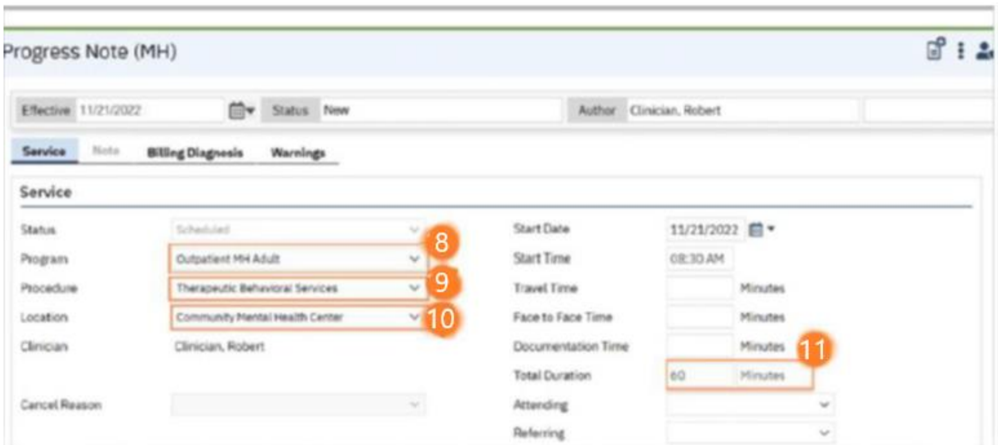
7. Click OK.

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

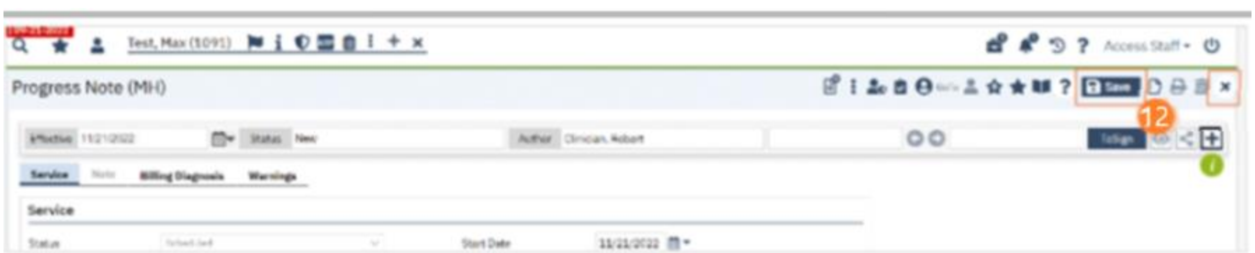
9. Click the drop-down menu in the Procedure field and select the appropriate procedure.

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.

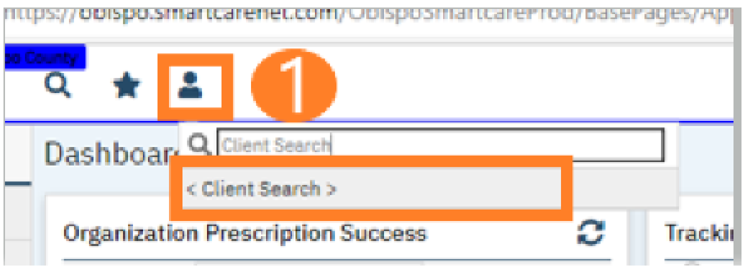


For NEW/UNOPENED clients:

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

Client Search & Inquiry

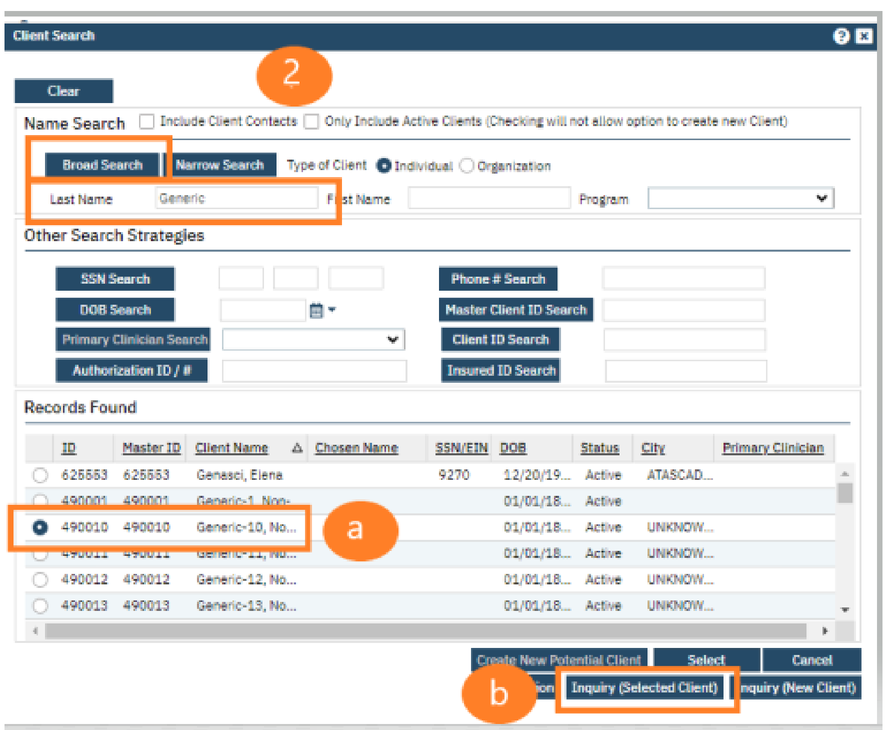
1. Use the Client Search



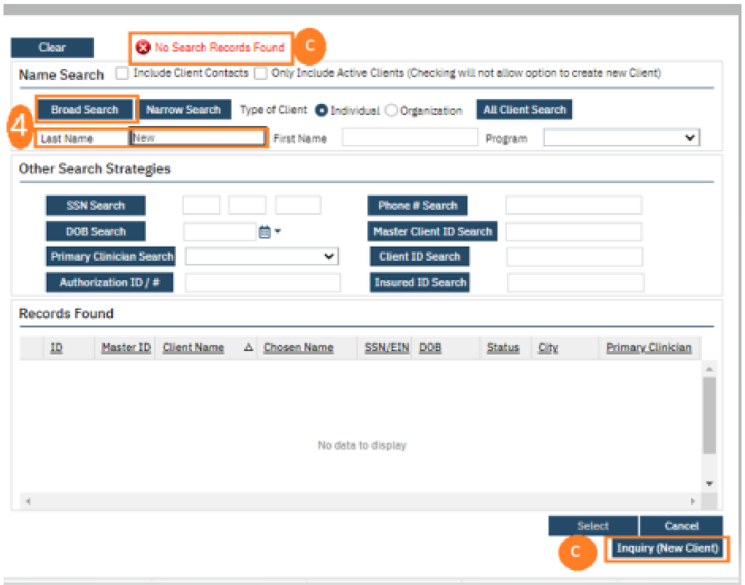
2. This will open the client search window. You may search to determine if the person is a current client.

   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.

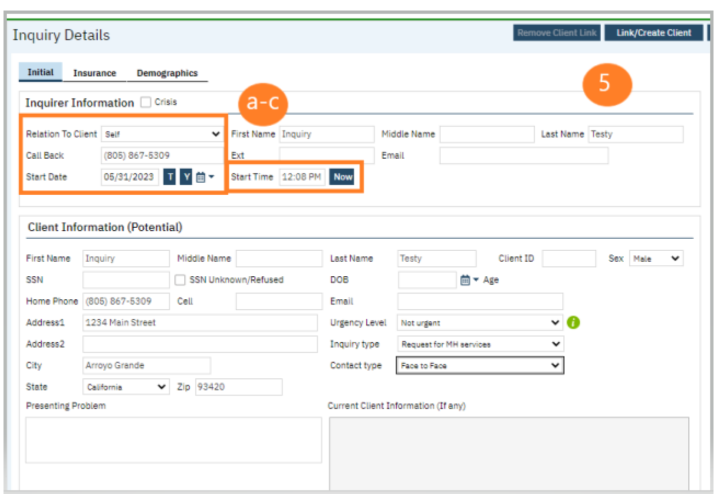


c. If a person is a new client, or you cannot find them in the system, click “Inquiry (New Client)”.



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.



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.

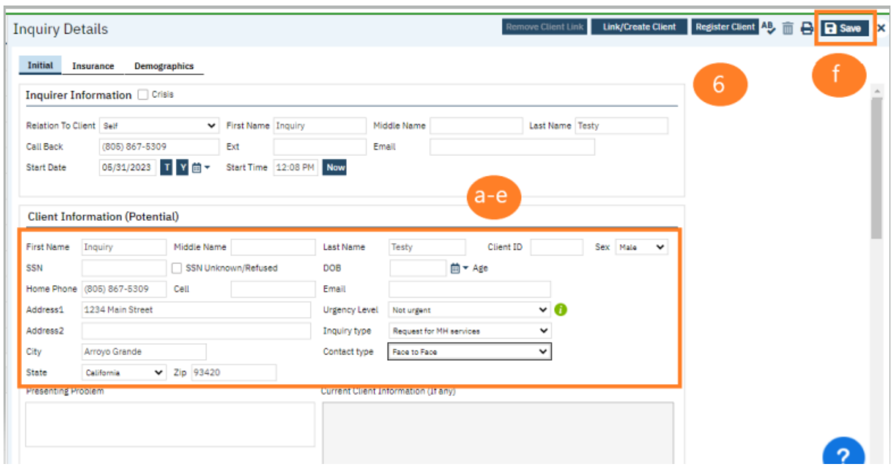
b. Complete the SSN and DOB fields. If the client refuses to share, or does not know, you can simply check the box “SSN Unknown/Refused.” Once saved, this will fill in the SSN with “999999999”, which is SmartCare’s version of “no SSN”.

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.

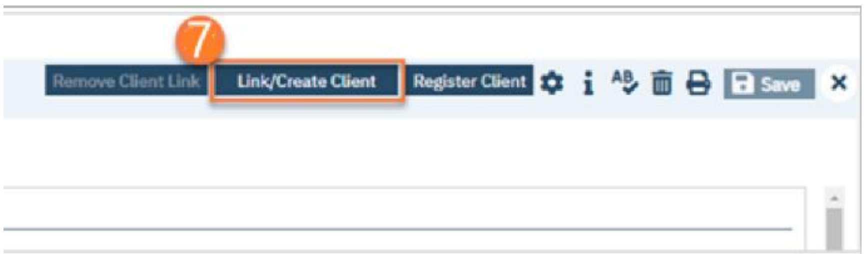


Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

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

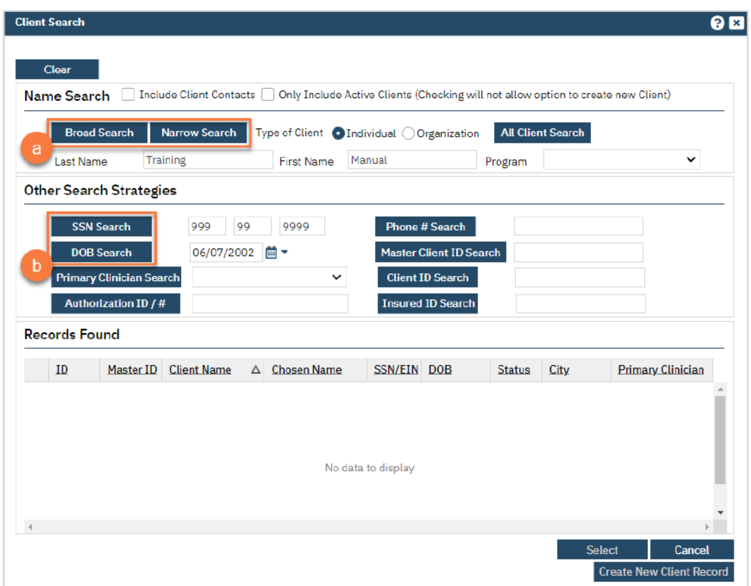
Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry 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.

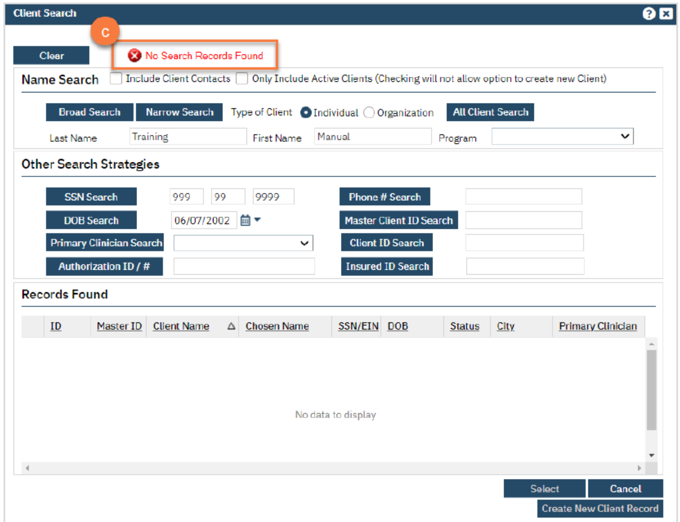


a. You must search by name by clicking on either “Broad Search” or “Narrow Search”.

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.

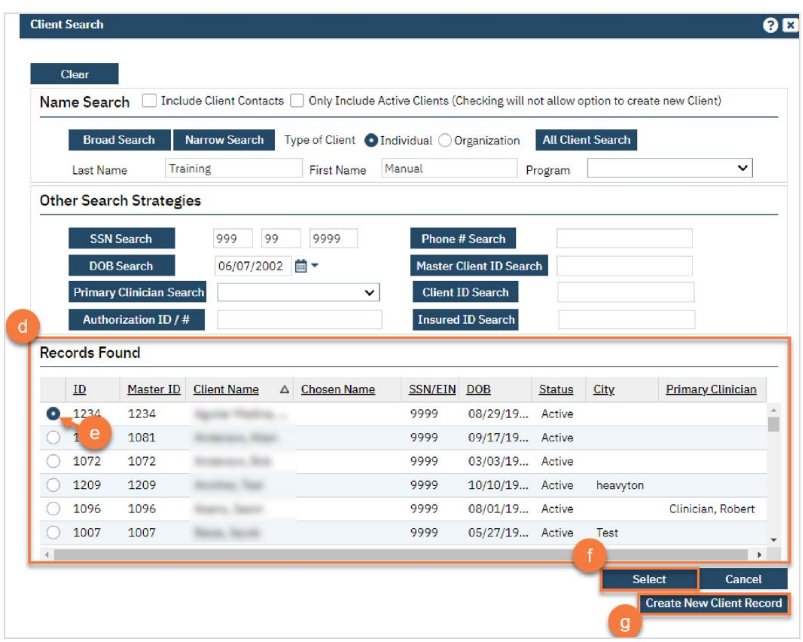


d. Any search results will show in the "Records Found" area. Review the Records Found to determine if the person is already in the system as a client.

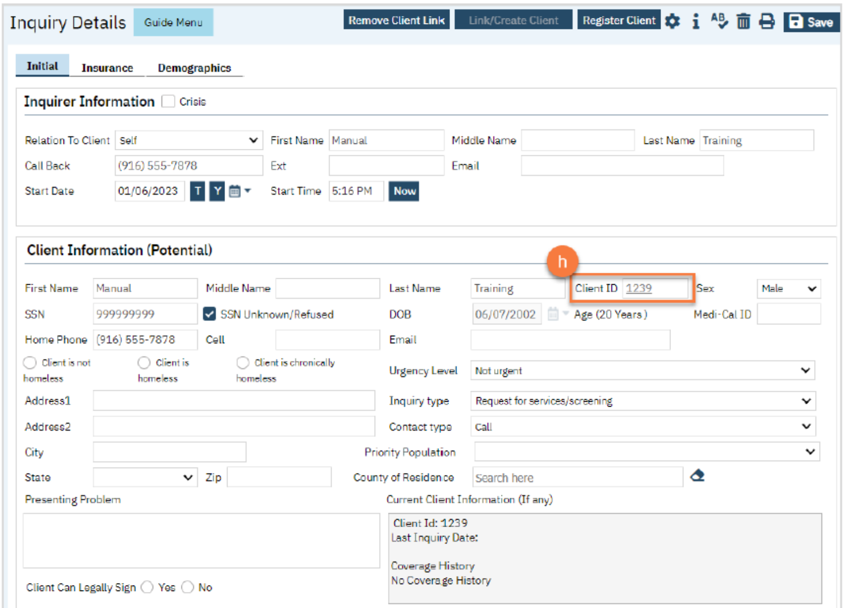
e. If the person is already a client in the system, select the button next to the appropriate record.

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."

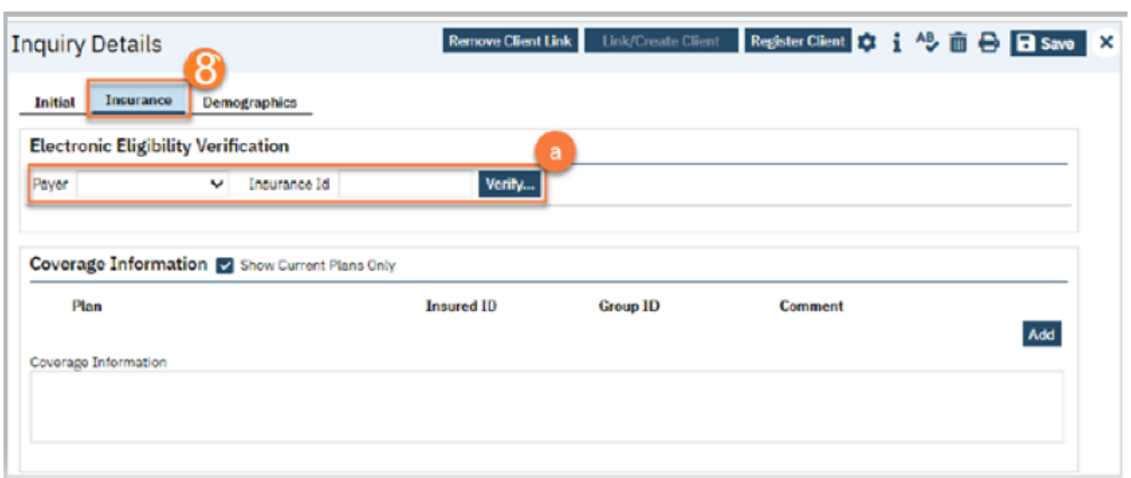


h. This will take you back to the Inquiry screen but now a client ID number will be added.

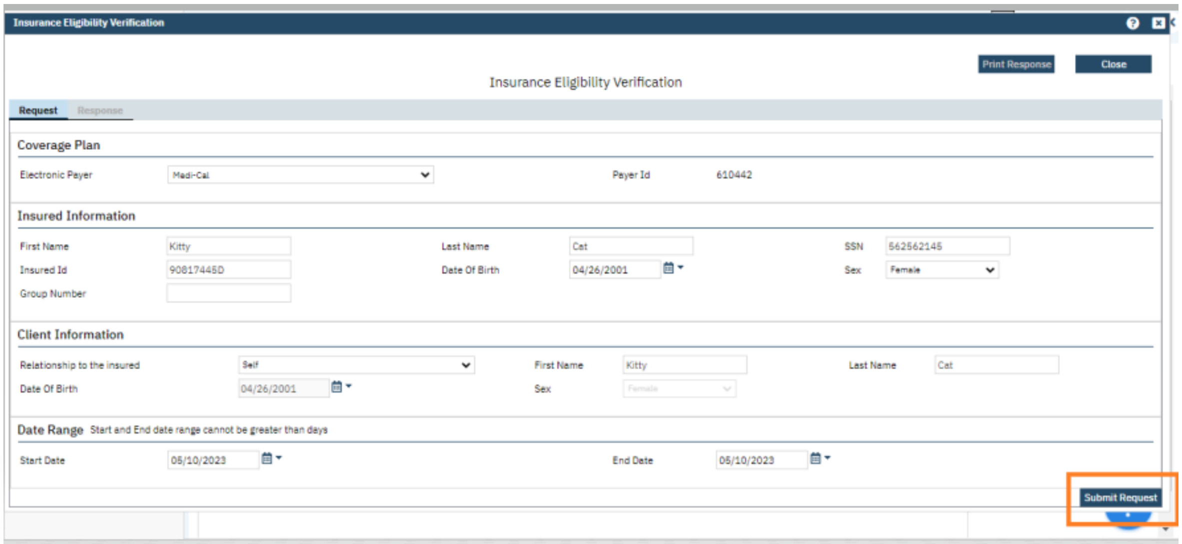


6. Click on the "Insurance" tab.

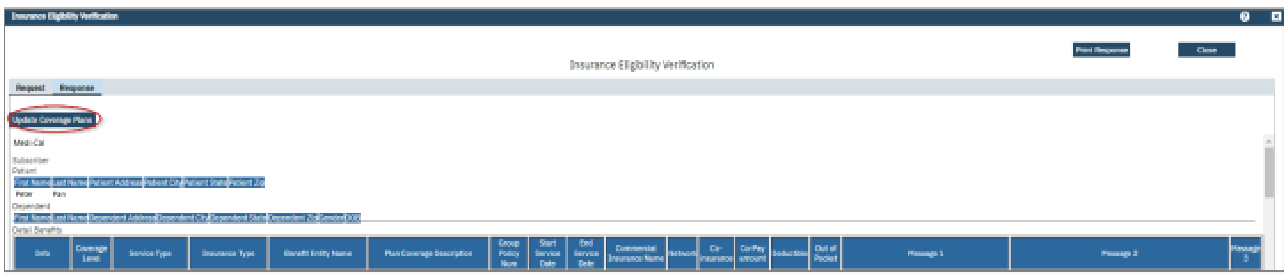
a. Select "Medi-Cal" from the "Payer" drop-down and enter the client's Medi-Cal number (CIN) in the "Insurance ID" field. Click "Verify" to verify the client's Medi-Cal insurance.



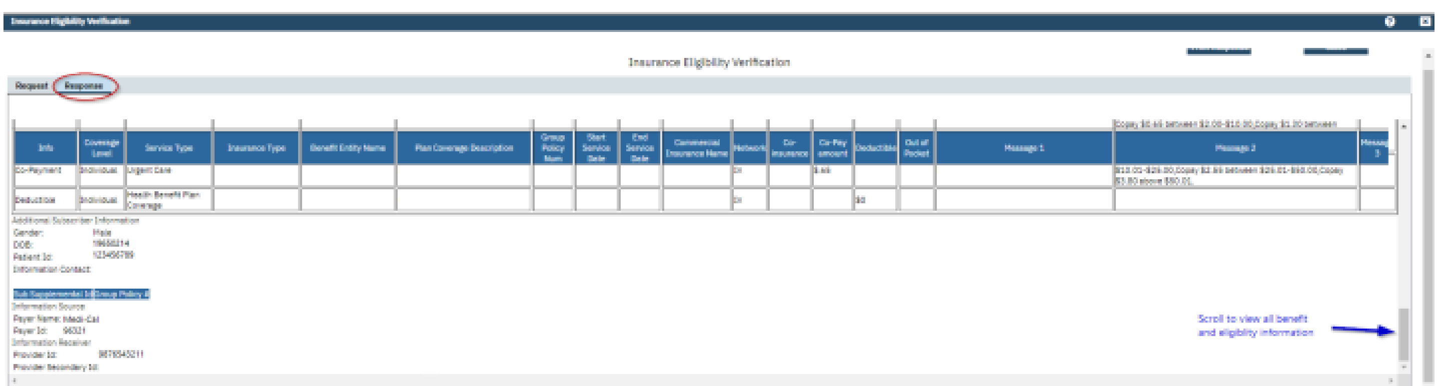
b. The Insurance Eligibility Verification screen opens. Click Submit Request.



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



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

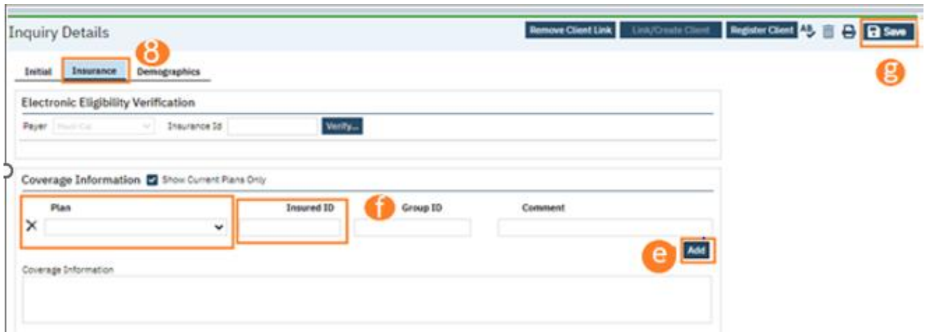


d. Click close to exit this screen.

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.



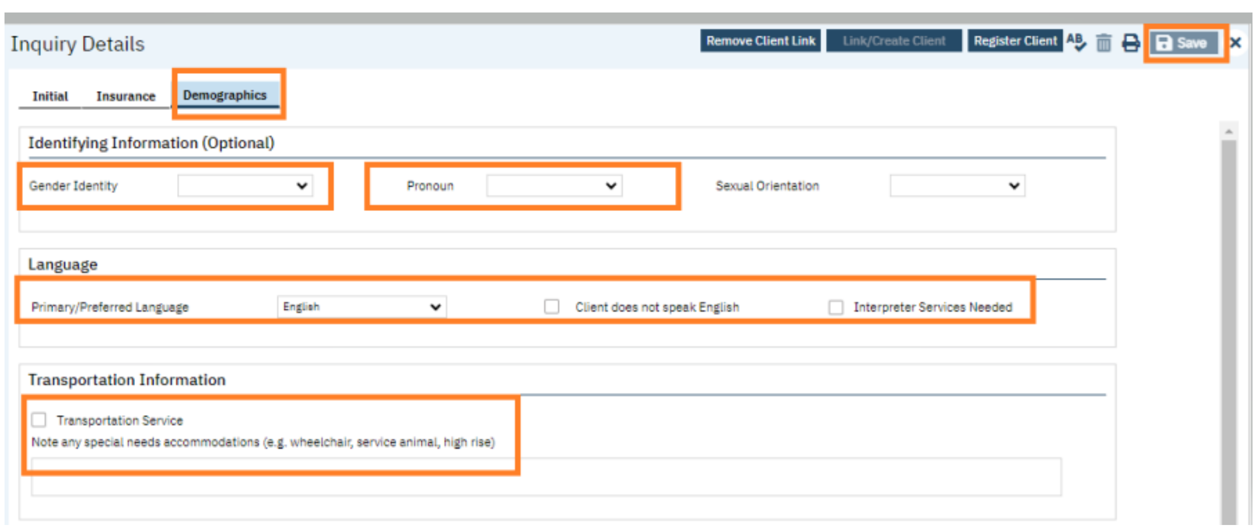
7. Click on the "Demographics" tab

a. We recommend completing the "Gender Identity" and "Pronoun" fields to ensure the person is not misgendered as additional staff engage with the client.

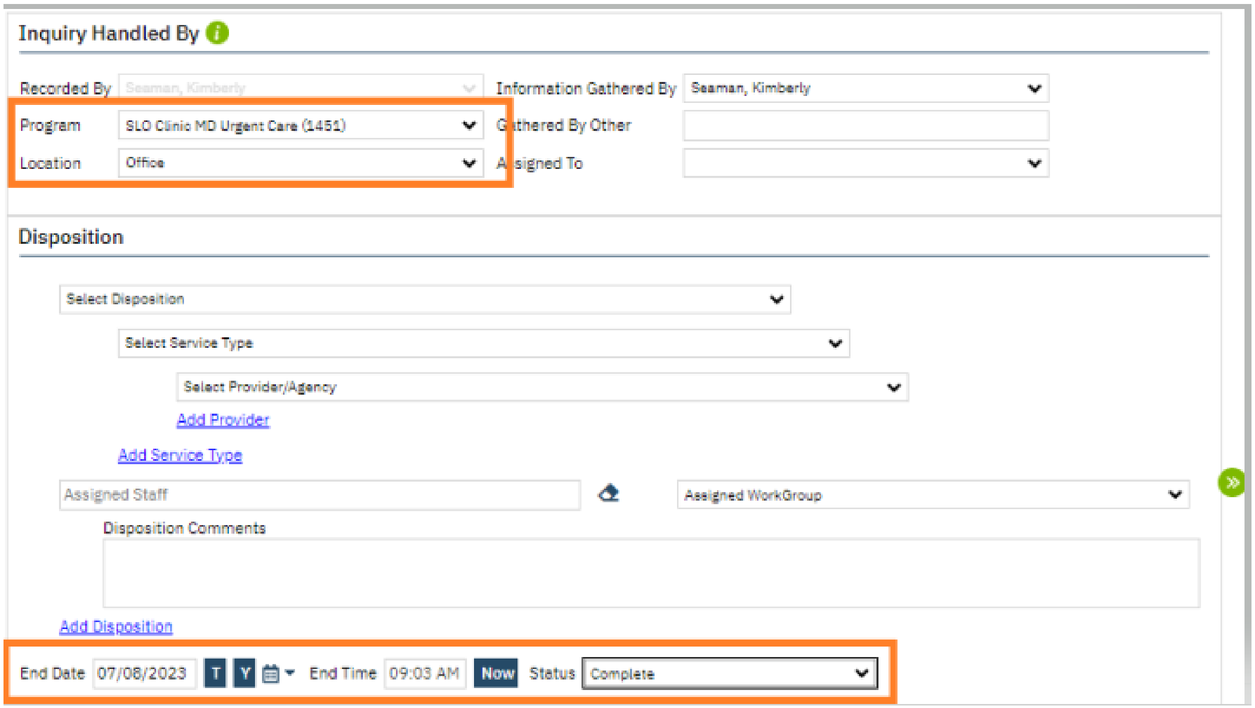
b. Complete the "Primary/Preferred Language" field. If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.

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.

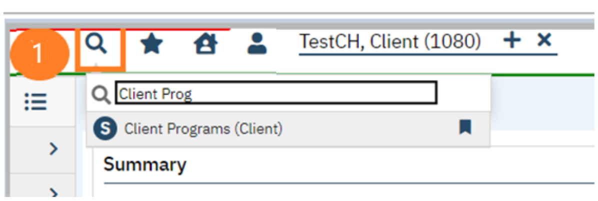


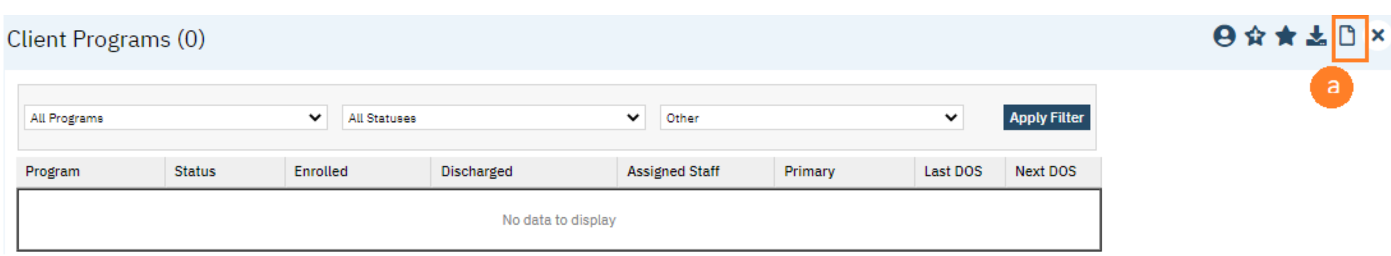
8. Go back to the Initial tab and enter in your program and location of screening. Select the end date (T for Today) and end time (Now) and change status from in progress to complete. Click Save and X to close. NOTE: take note of the Client ID# so you may enter when opening client record.



Enroll client in your program

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





g. Click new.

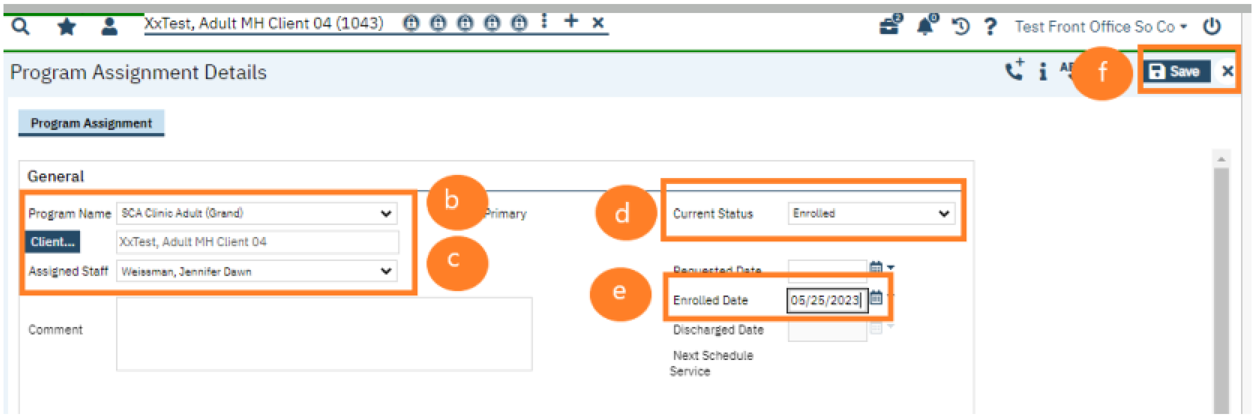
h. In the Program Name field, select the UCC program.

i. In Assigned Staff, select the staff member client will be seeing.

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

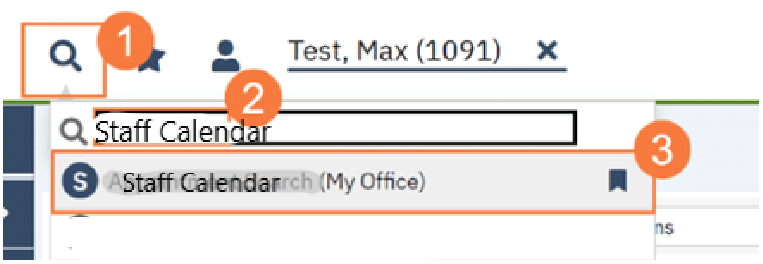
k. Enter in Enrolled Date.

l. Click Save and X to close.

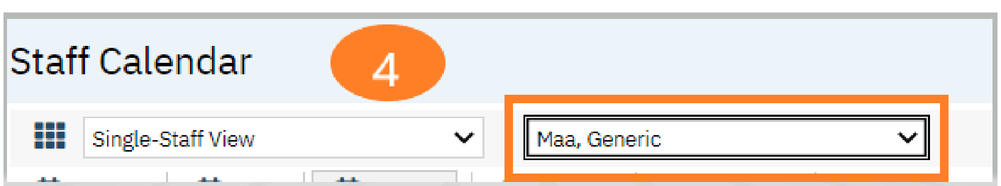


Add Client to Staff's Schedule

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)**

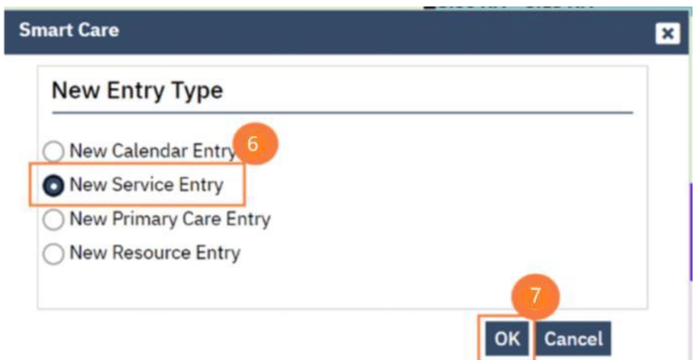


4. Select the staff you want to schedule for.



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.



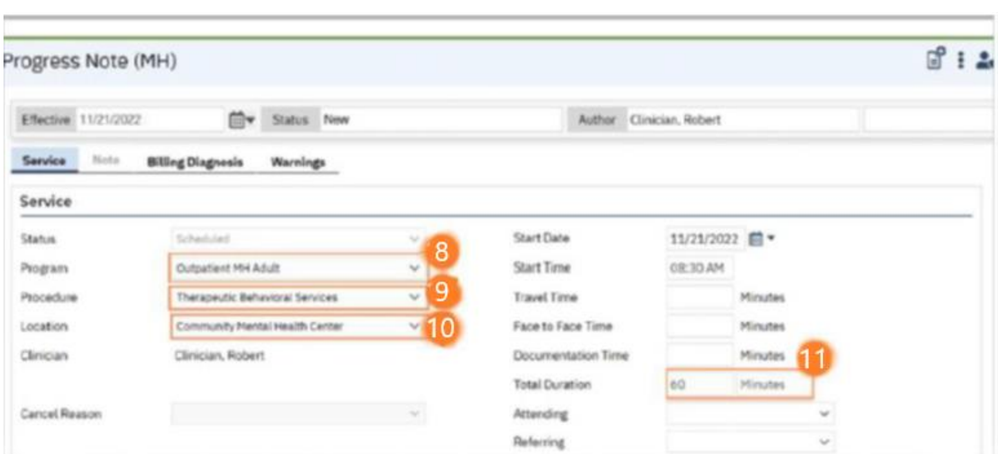
7. Click OK.

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.