**MH SmartCare Lite User Guide**

**Getting Started, Setup**

**System is LIVE on June 30. Please log in and check access before July 1**[**Fresno SmartCare Production Link**](https://fresno.smartcarenet.com/FresnoSmartcareProd/Login.aspx)

* + How to add a new SmartCare user (credentialing, ESA’s, User log)
    - DBH IT will create the accounts. The process is the same as before. Authorized representative will contact the Contract Analyst to request. Same spreadsheet as before. The email address is required, please be sure it is valid and correct.
  + SmartCare system requirements

 

* + Check Programs
    - Search for “Fresno Staff Setup (My Office)”
    - One staff person at a time
    - You will be able to see what program(s) you are assigned to.

**Basic Navigation, home screen, widgets, chart view**

* + - [Logging in to SmartCare](https://2023.calmhsa.org/logging-in-to-smartcare/)
    - [How to Reset Your Password](https://2023.calmhsa.org/how-to-reset-your-password/)
    - [EHR Essentials Quick Guide](https://2023.calmhsa.org/wp-content/uploads/2023/06/EHR-Essentials-6-6-23-1.pdf)
    - [Preferences](https://2023.calmhsa.org/preferences/)
    - [Widgets](https://2023.calmhsa.org/widgets-2/)
    - [Icons](https://2023.calmhsa.org/icons/)
    - [List Pages](https://2023.calmhsa.org/how-to-use-list-pages/)
    - [How to Use the Client Search Window](https://2023.calmhsa.org/how-to-use-the-client-search-window/)
      * [How to Use the Client Search Icon](https://2023.calmhsa.org/how-to-use-the-client-search-icon/)
    - [How to Send a Message](https://2023.calmhsa.org/how-to-send-a-message/)

[**Client Inquiry**](https://2023.calmhsa.org/how-do-i-document-a-request-for-services-received-via-the-access-line/)

The following functions may occur in the [**Client Inquiry**](https://2023.calmhsa.org/how-do-i-document-a-request-for-services-received-via-the-access-line/)form

* + Access Line Call Log
  + New Client Creation
  + Client Search
  + Insurance verification (check Medi-Cal)
  + Demographics

**Staff update (names/address)**

* + [Enter Demographic Information](https://2023.calmhsa.org/enter-demographic-information/)

**Client Update (names/address)**

* + Search for client name or client ID
  + Open the Client Information (C) screen
  + Select the Demographics tab
  + Update the appropriate information
  + Click the “Save” button

**Admitting/Discharging to a Program**

* + [How to Add the Client to Your Program](https://2023.calmhsa.org/how-to-add-the-client-to-your-program/)
  + [How to Close a Client to a Program](https://2023.calmhsa.org/how-to-close-a-client-to-a-program/)

**Client Services Information (CSI) (MH Only)**

* + - * [How to Complete a CSI Assessment Data Record](https://2023.calmhsa.org/how-to-complete-a-csi-assessment-data-record/)
      * [How to Complete a CSI Demographic Record](https://2023.calmhsa.org/how-to-complete-a-csi-demographic-record/)

**Scanned documents, document viewer (MH Only)**

* + - [Screens vs. Documents](https://2023.calmhsa.org/screens-vs-documents/)
    - [How to Scan a Document into the Client Record](https://2023.calmhsa.org/how-to-scan-a-document-into-the-clients-record/)
    - [How to Upload a Document into the Client Recor Without a Scanner](https://2023.calmhsa.org/how-to-upload-a-document-into-the-clients-record-without-a-scanner/)
    - **How to view client’s documents**: Search for Documents (Client) list page, select client

**Client Flags**

* + [How do I Create a Flag to Alert Treatment Team Members to Important Client Information](https://2023.calmhsa.org/how-do-i-create-a-flag-to-alert-treatment-team-members-to-important-client-information/)

**Special Populations**

* + [How to Identify a Client as Katie A or Other Special Population](https://2023.calmhsa.org/how-to-identify-a-client-as-katie-a-or-other-special-population/)

**Request to Block Charts**

* + Email the Medical Records inbox (see bottom of document).

**How to Direct Enter/Batch Submit Service Data**

* + - * [Service Import](https://2023.calmhsa.org/wp-content/uploads/2023/06/Service-Import-In-to-Practice-Management-Job-Aid.pdf) (Scroll down. The first few pages are blank)
        + How to upload
        + How to review for errors
      * Batch Service Upload Template:  
        ****
      * [How to Add a Problem to the Problem List](https://2023.calmhsa.org/how-to-add-a-problem-to-the-problem-list/)
      * [How to Remove a Problem that has been Resolved](https://2023.calmhsa.org/how-to-remove-a-problem-thats-been-resolved/)
      * For perinatal clients:



**Services Report**

* 1. Search for the “Services (My Office)”
  2. Refer to [List Pages](https://2023.calmhsa.org/how-to-use-list-pages/) for how to utilize this page
  3. Must run by program

**Client Account**

* 1. [How to Get to the Client Account Screen](https://2023.calmhsa.org/howtogettotheclient-account-screen/)
  2. [Client Account Overview Tab](https://2023.calmhsa.org/clients-account-overview-tab/)
  3. [How to View Client Fee Records](https://2023.calmhsa.org/how-to-view-client-fee-records-2/)

**NOABD (MH Only):** [How to Scan a Document into the Client Record](https://2023.calmhsa.org/how-to-scan-a-document-into-the-clients-record/)



**Medi-Cal Screening Tools (MH Only)**

* + **Adult:** Same as the Youth Tool. Link on CalMHSA website does not work.
  + **Youth:** [How to Complete a Youth Medi-Cal Screening Tool](https://2023.calmhsa.org/how-to-complete-a-youth-medi-cal-screening-tool/)

**Child and Adolescent Needs and Strengths Assessment**

* + - * [Child and Adolescent Needs and Strengths CANS Tool](https://2023.calmhsa.org/child-and-adolescent-needs-and-strengths-cans-tool/)

**PSC-35**

* + - * [Pediatric Symptoms Checklist](https://2023.calmhsa.org/pediatric-symptom-checklist-psc/)

**Clinical Error Details (deletion requests)**

* + - “How-to” TBD
    - SUD Email – DBHadpbusinessoffice@fresnocountyca.gov
    - MH Email – DBHmentalhealthcorrections@fresnocountyca.gov

**Client Referrals**



**For assistance**

1. Identify/create expert users on your team
2. If your team doesn’t know the answer, refer to assigned DBH Contracts URS

Medical Records? - DBH Medical Records Child [dbhmedicalrecordschild@fresnocountyca.gov](mailto:dbhmedicalrecordschild@fresnocountyca.gov)

-DBH Medical Records Adult [dbhmedicalrecordsadult@fresnocountyca.gov](mailto:dbhmedicalrecordsadult@fresnocountyca.gov)

Technology questions? - [DBHISDMailbox@fresnocountyca.gov](mailto:DBHISDMailbox@fresnocountyca.gov)

Clinical questions? - [DBHQualityImprovement@fresnocountyca.gov](mailto:DBHQualityImprovement@fresnocountyca.gov)

Admitting questions? - [DBHOperationsAITEAM@fresnocountyca.gov](mailto:DBHOperationsAITEAM@fresnocountyca.gov)

Billing Questions? - [start](mailto:DBHAccountsReceivable@fresnocountyca.gov) with expert users.