SMARTCARE:

1) QI Team- Inquiry Form

2) IT- Navigating Smartcare

Opening, closing and enrolling to Smartcare

CalOMS Admissions and Discharges

3) QI Team-DMC-ODS Outpatient Timeliness Record/DMC-ODS Opioid Timeliness Record

Client Flags

Client Clinical Problems Form (problem list)

4) Contracts- Batch Upload

Reports/List pages

INQUIRIES (MY OFFICE)

WHAT AND WHY?

The Inquiry form, known in Avatar as “The Admission (Outpatient) form” is used for tracking purposes to ensure the DMC-ODS programs are responding to beneficiary SUD service needs in a timely manner. This is also a form to verify Medi-Cal Eligibility.

Inquiries (My Office)

When do you complete an Inquiry?

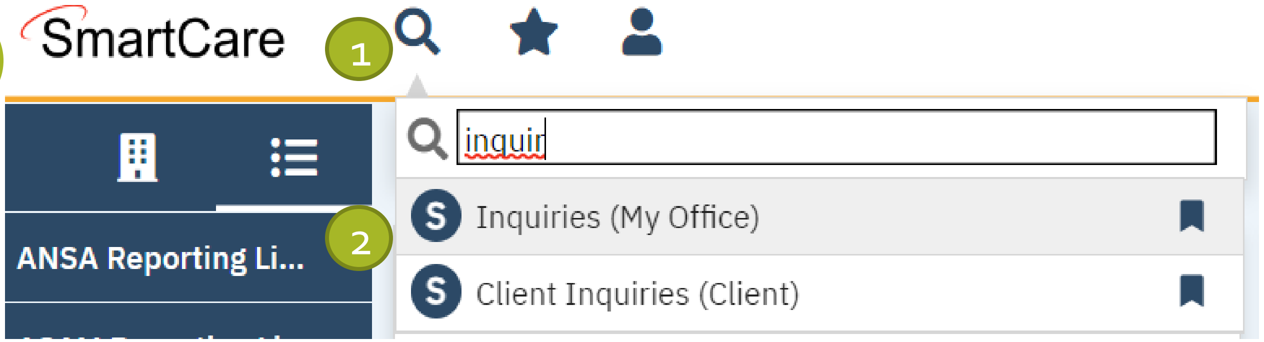
- You complete an Inquiry when a request is made
- Inquiries do not all result in enrollment and/or need Timeliness Record form

- This link will take you to a video and walk you through the Client Inquiry form. The inquiry form is used to track requests of services and timeliness.

  How do I document a request for services received via the Access Line? - 2023 CalMHSA

How To Search for the Inquiry form

1. Search for Inquiries (My Office)



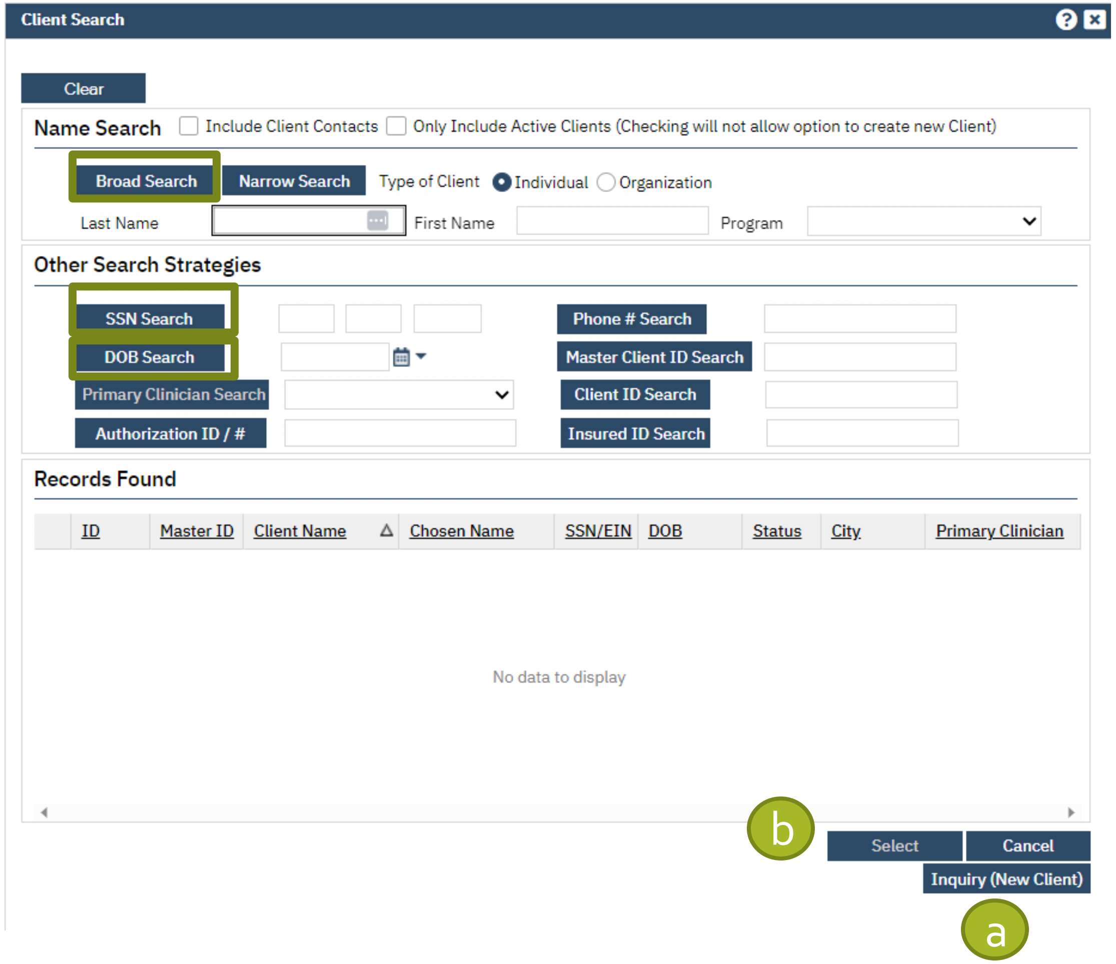
2. Create a new inquiry by clicking the new icon

Inquiries (My Office): Client Search Window

3. You may search to determine if the person is a current client.
   - Click “Broad Search”, Click “SSN Search”, Click “DOB Search”

a) If person is **new** in the system, click “Inquiry (New Client)”

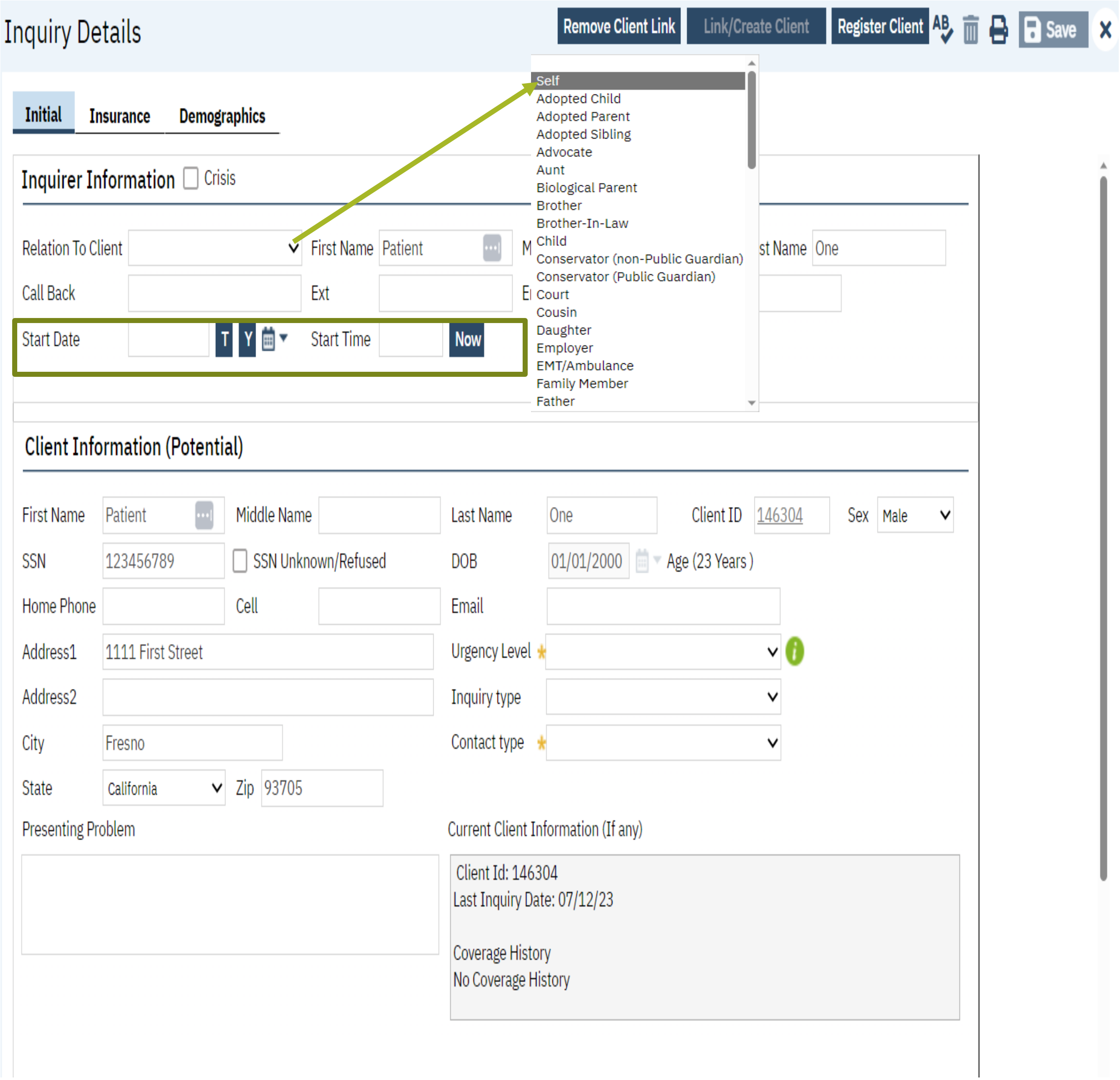
b) If person **is in the system,** click “Select” so their information can be brought into the Inquiry Screen



Inquiries (My Office)

4. Complete the information about the caller or "Inquirer" (This is in the Inquiry Details)

- If the client is calling for themselves, select Self under "Relation to Client."
- Complete start Date and start time of Inquiry
- Fields that need to be completed;
  - First and Last Name
  - Complete SSN and DOB, If unknown/refused click the box, this will fill in the SSN with "999999999"
  - Complete Urgency Level, Inquiry Type and Contact type fields
  - Click Save



More Information on the Fields

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

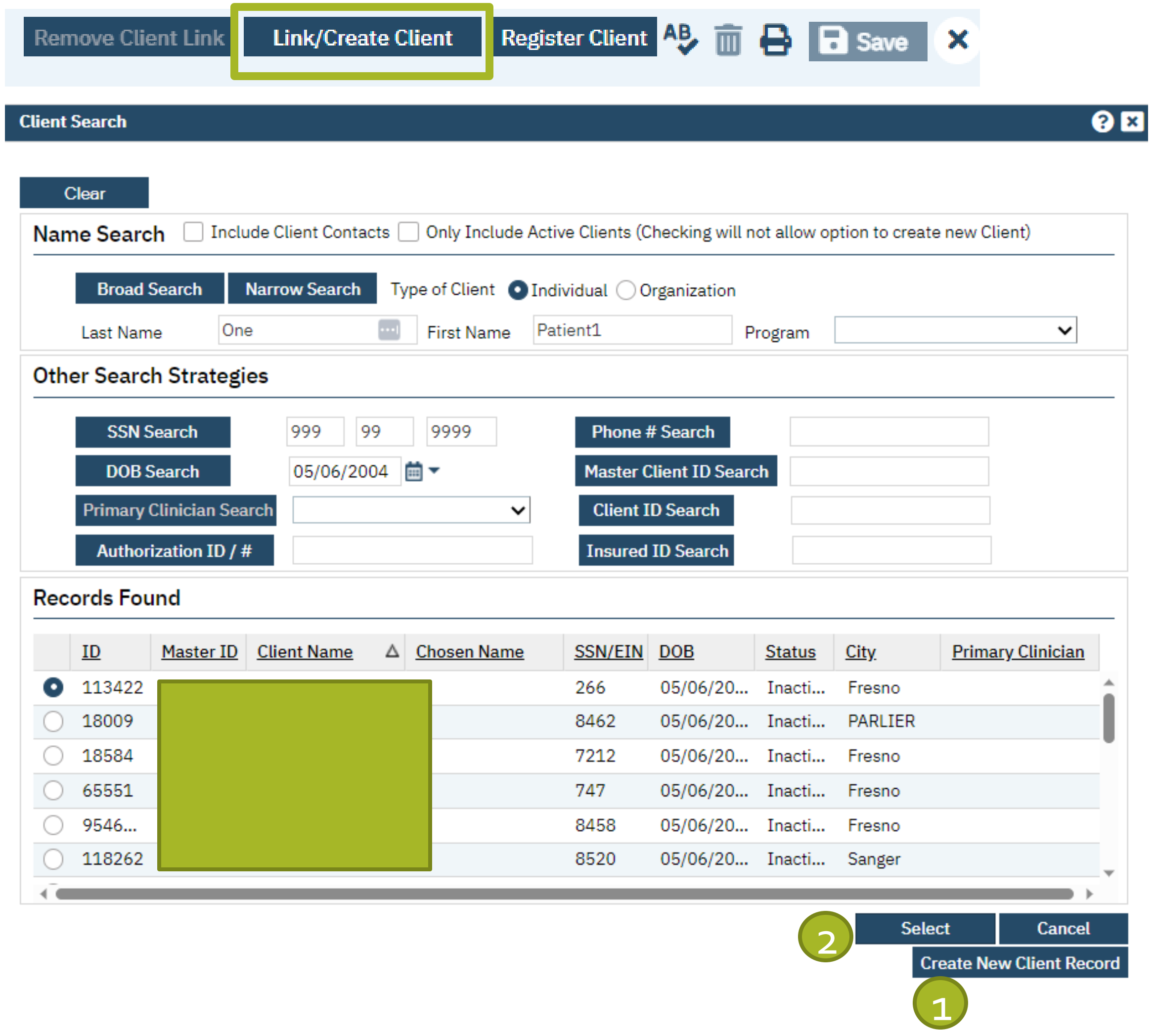
Link/Create Client button

5. Select the "Link/Create Client" button (This is only if the person is new to our system of care and does not have a ClientID

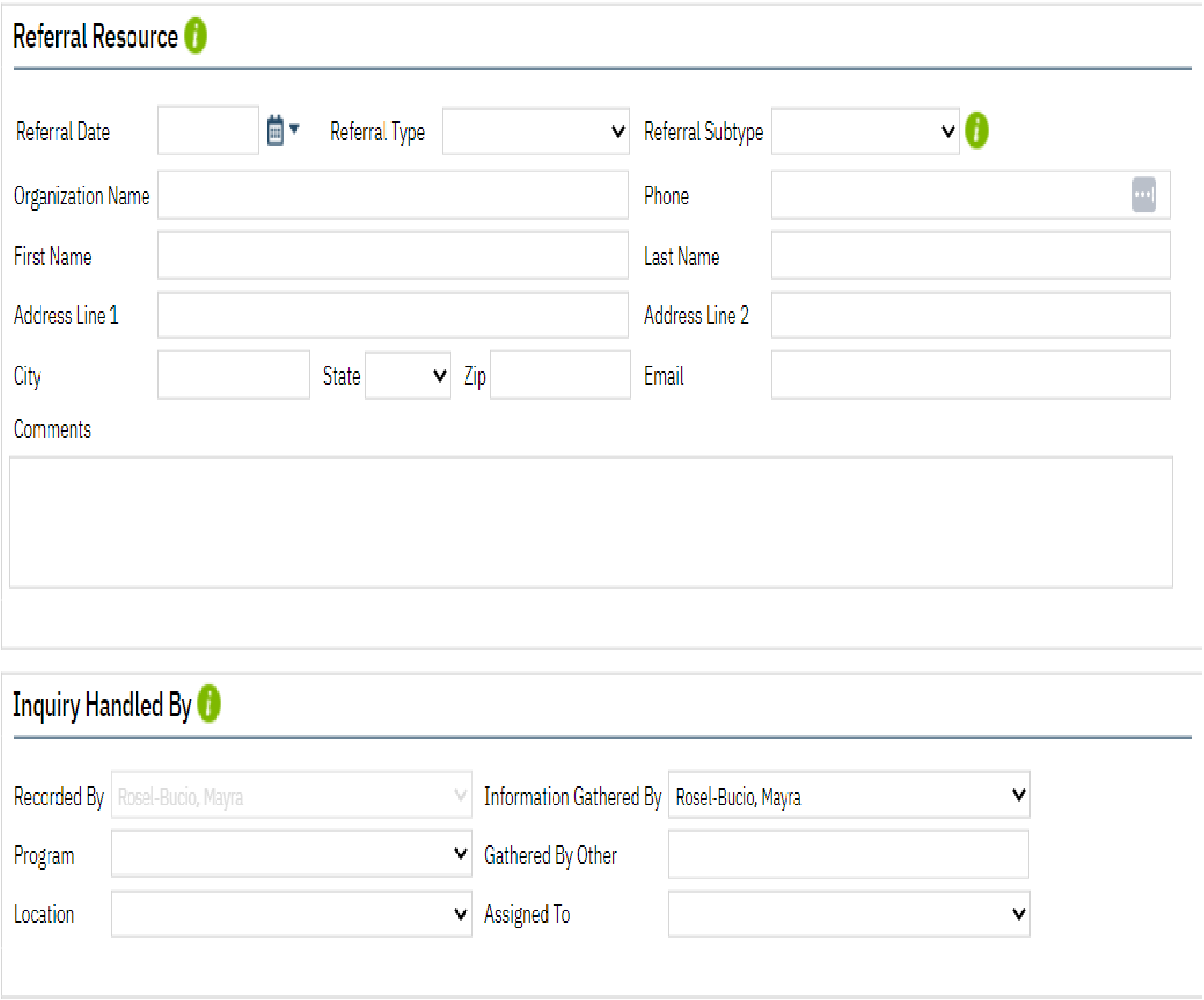
- The Client Search Window will appear and you will <u>need to click on the following:</u> "Broad Search", "SSN Search" and "DOB Search"

1) If person is not found click on Create New Client Record, you will be taken to the Inquiry Details screen and the Client ID number will be added

2) If person is found click on select



Inquiries Continued…



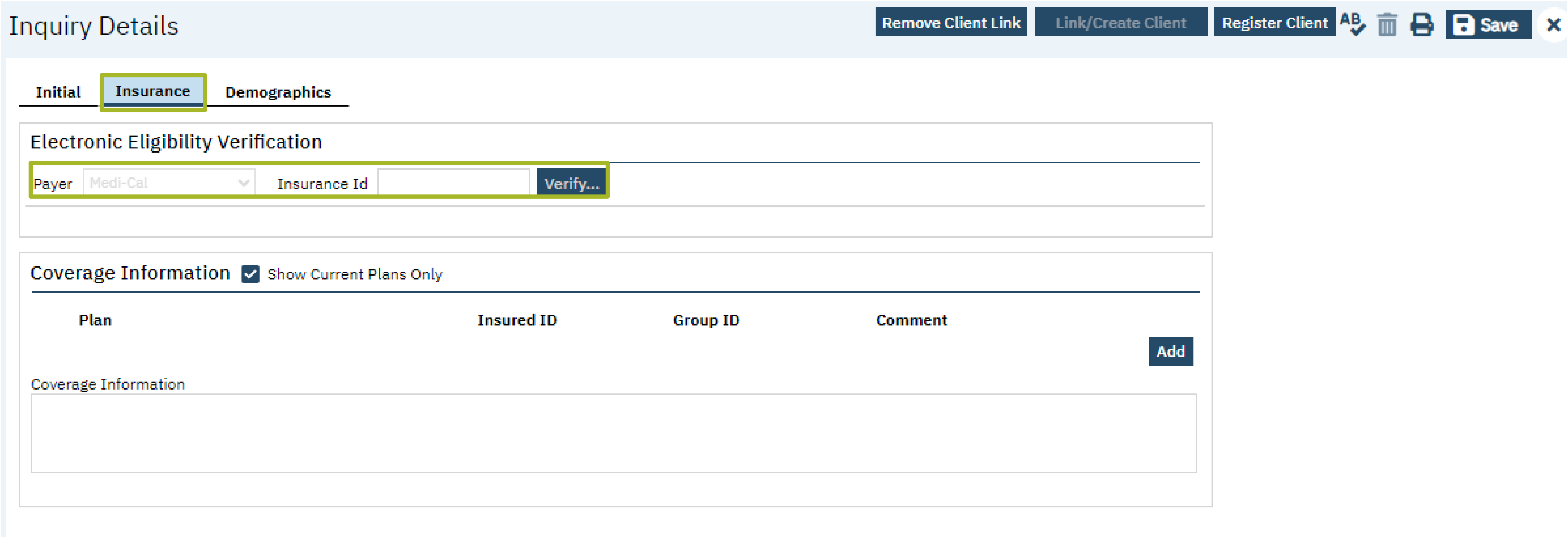
6. Complete Referral Resource Information If this Inquiry is a referral from another LOC, Program or organization

7. Inquiry Handled By information is optional but is important especially for Emergent and Urgent request

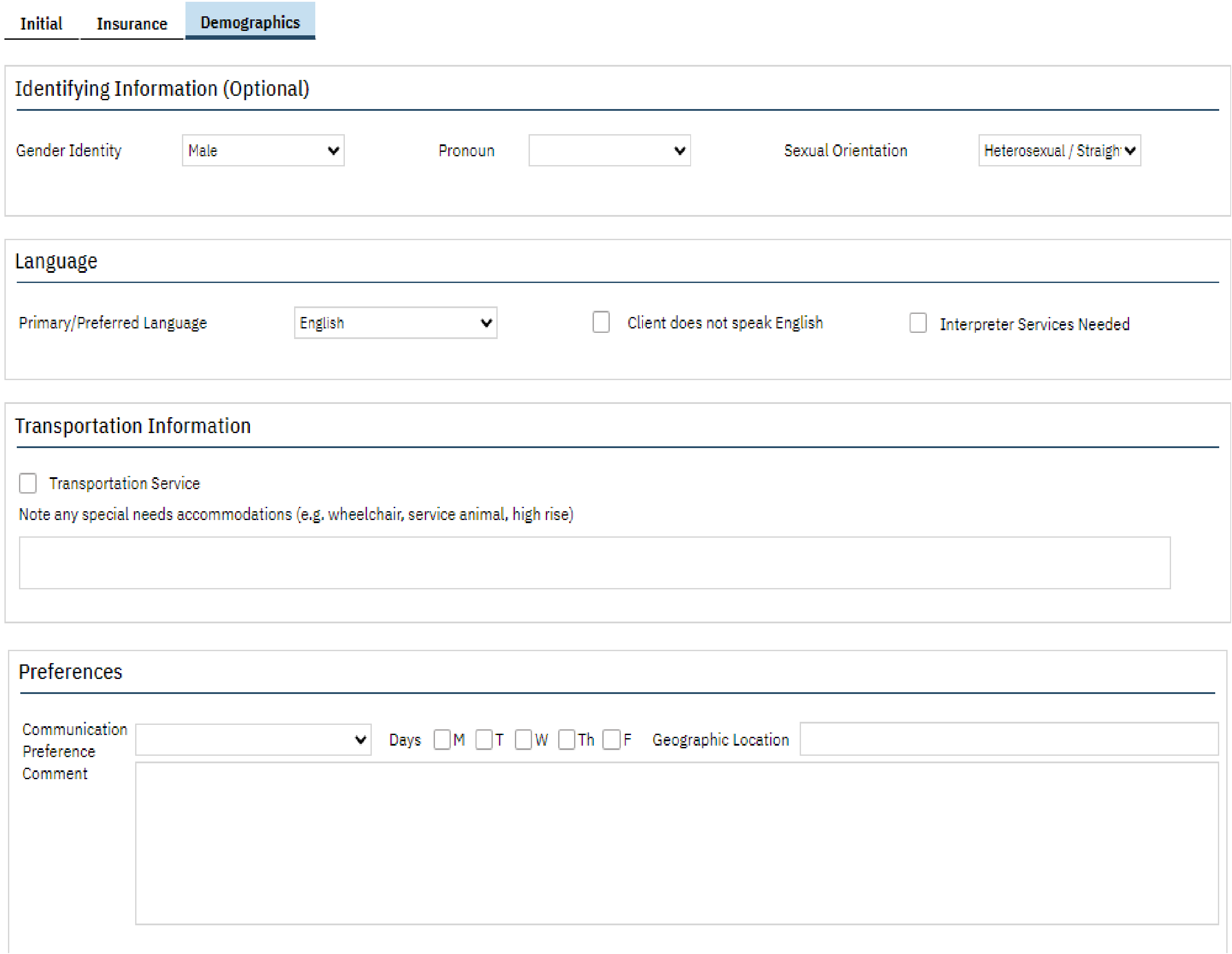
Inquiries: Insurance Tab

8. Click on the “Insurance” Tab

Select “Medi-Cal” from the “Payer” drop-down and enter the Medi-Cal number (CIN) in the “Insurance ID” Field. Click “Verify” to verify the client’s Medi-Cal insurance

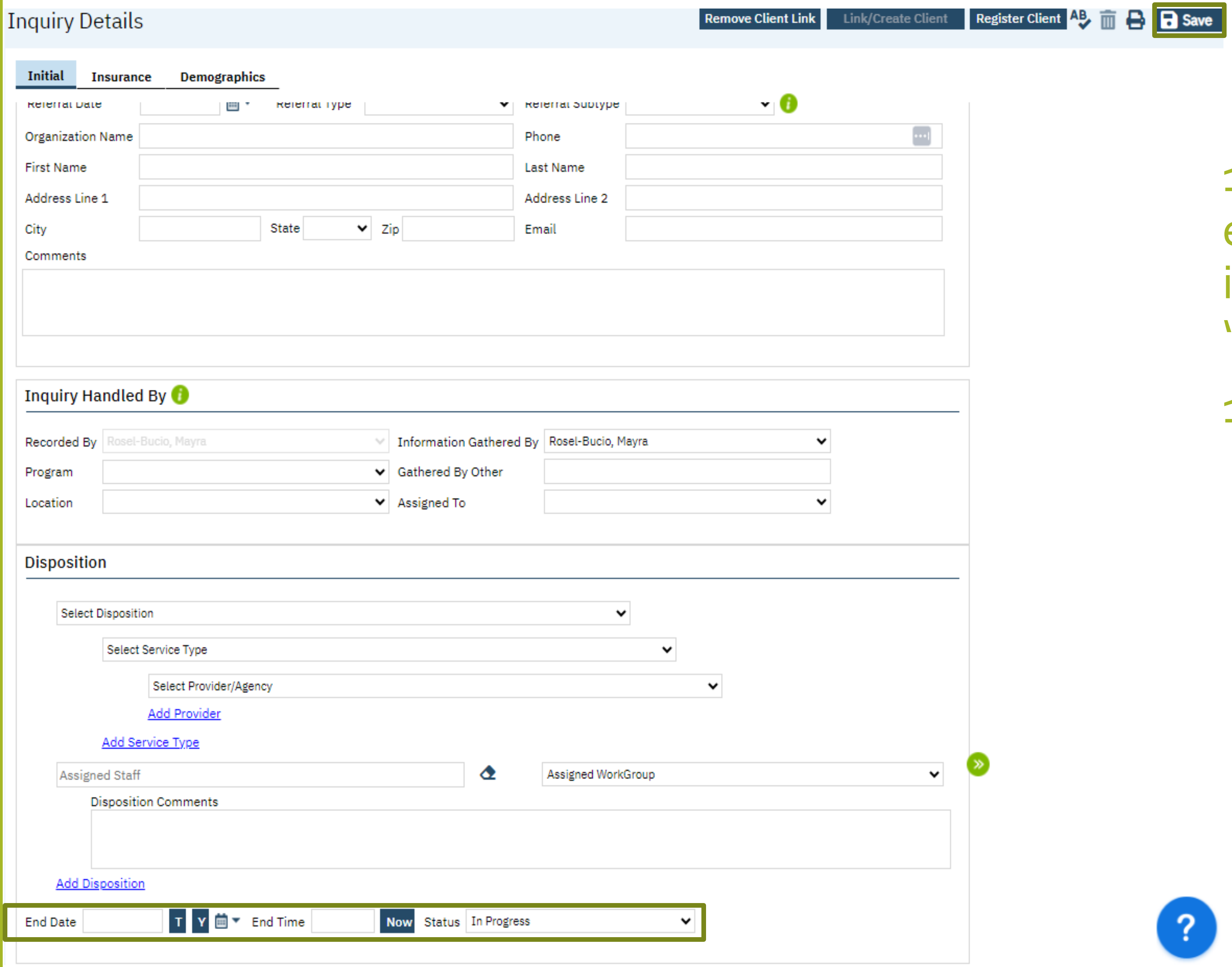


Inquiries: Demographic Tab



9. Click on the "Demographics" Tab

- We recommend completing the following items: "Gender Identity", "Pronouns", "Primary/Preferred language" and if client has any transportation issues click on transportation service check box



Inquiry continued…

10. Once completed, enter the end date and time of the inquiry and change status to "Complete"

11. Click Save

THE DMC-ODS OUTPATIENT TIMELINESS RECORD (CLIENT)/ THE DMC-ODS OPIOID TIMELINESS RECORD (CLIENT)

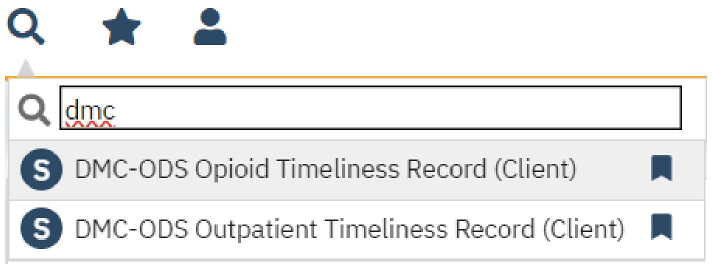
The DMC Outpatient Timeliness Record/The DMC Opioid Timeliness Record

When do you complete a Timeliness Record?

- You complete a DMC Outpatient Timeliness Record/ The DMC Opioid Timeliness Record when a request for SUD services is made **AND**

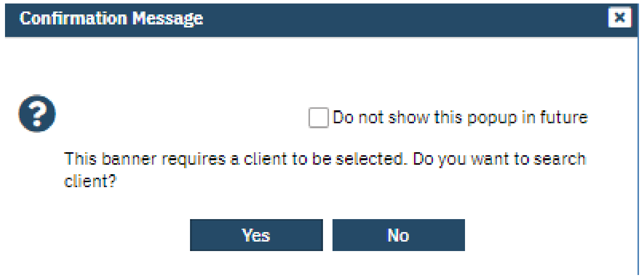
1. When an individual requests services in a program and does not have an open CalOMS admission in that program.
2. Every urgent request for service.

The DMC Outpatient Timeliness Record/The DMC Opioid Timeliness Record



1. Search for The DMC Outpatient Timeliness Record (Client)/The DMC Opioid Timeliness Record (Client)

2. If you don't have a client open you will need to search for a client. It may give you this message if it does

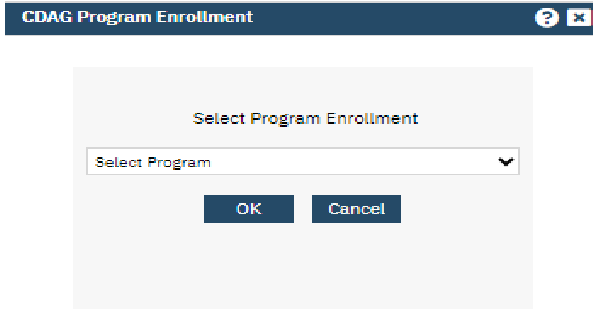


a) click yes, you can also disable this by checking the box, the Client search screen will open

b) enter name or client ID, click “Broad search” or “Narrow Search”

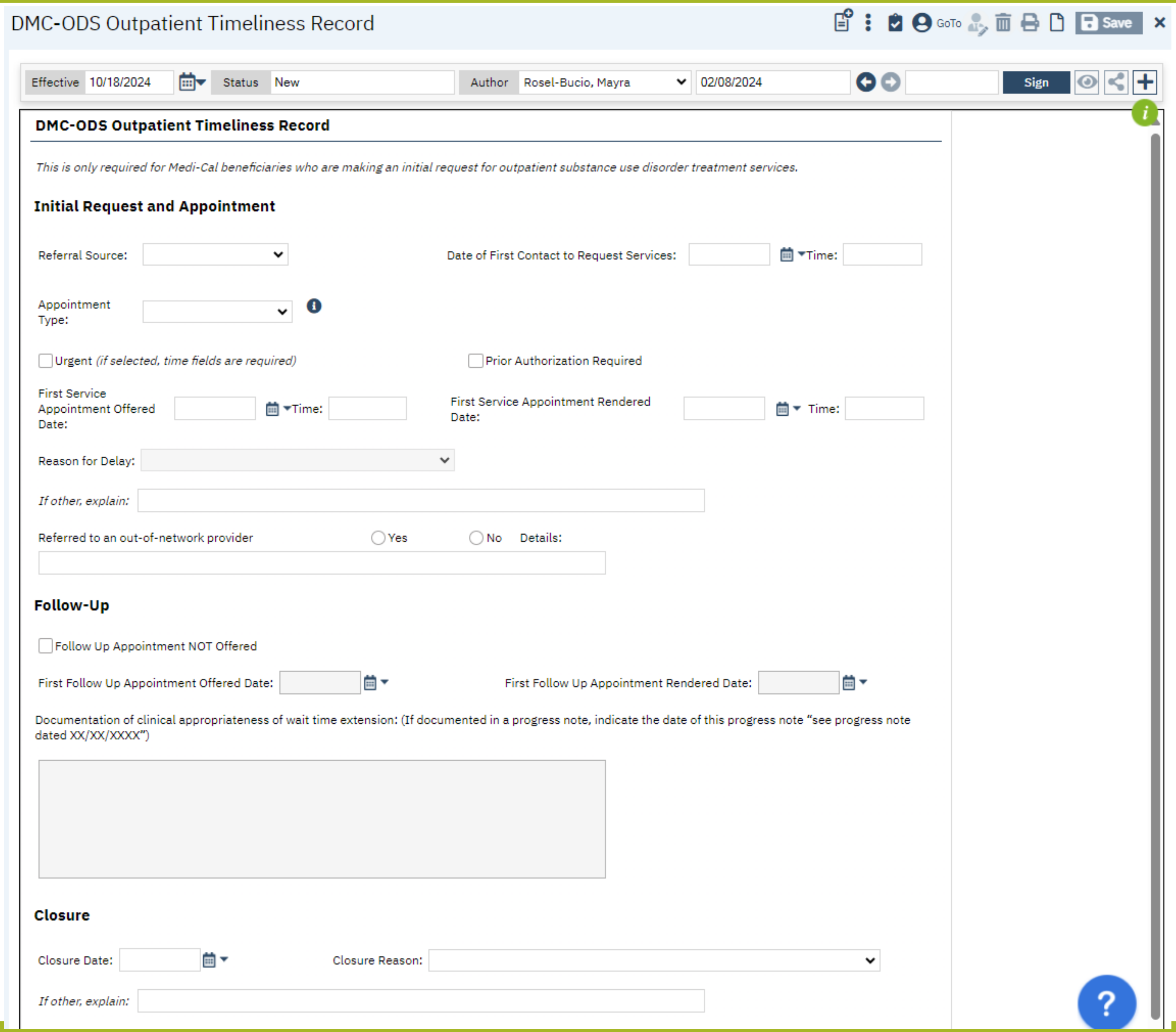
c) Once you find the person click “Select”

3. Create a new Timeliness Record by clicking the new icon

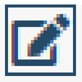


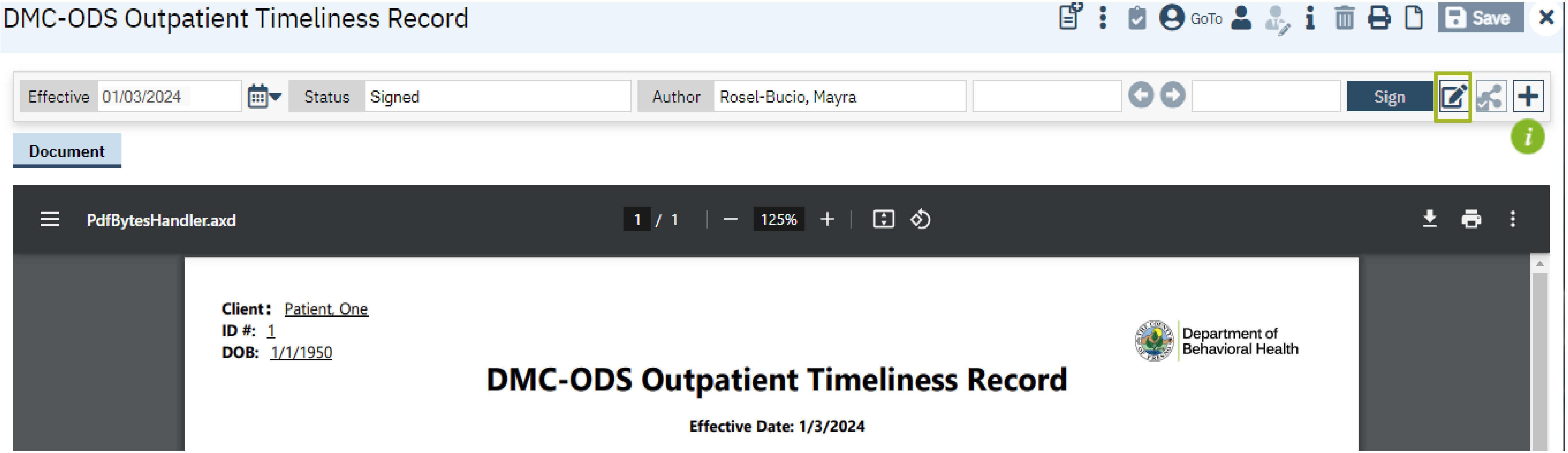
4. If you have multiple CDAGs you will have to select the program that will complete the assessment

- Complete dates and data in the appropriate fields
- If you have do not have all the information Save it and you or another person from your program can go back and enter the remaining information.
- To complete/finalize the Timeliness Record you will sign the form, Click “Sign”
- **Screening Programs (UCWC and YWC):** Complete fields Initial Request and Appointment section. Mark the Follow up Appointment Not Offered box, Close out the form with Closure Reason "Other" and type "Screening Program"



Timeliness Record continued

- Forms in SmartCare are saved as PDFs
- To edit forms you will need to be <u>the author of the form</u> and click on the icon 

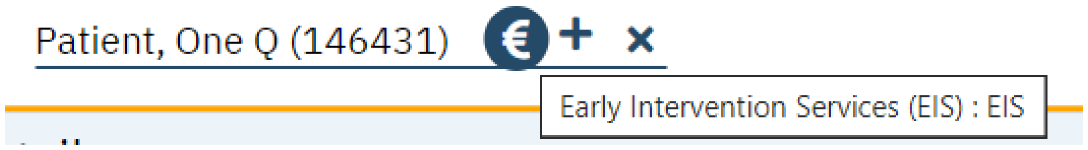


CLIENT FLAGS

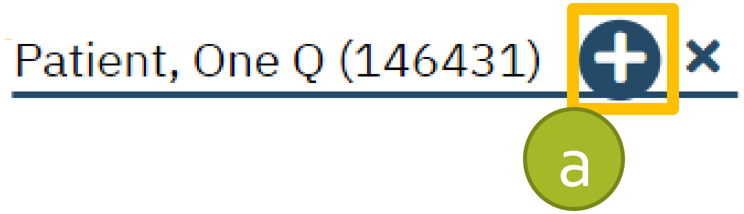
Client Flags

Client Flags are used in SmartCare to track or notify end users of client information.

- Some flags will pop up when you open a client for example, Blocked charts are currently flaged and entered by the Medical Records department
- Flags can also be seen next to a client’s name on the search bar. If you hover over it, you will see what the flags are for

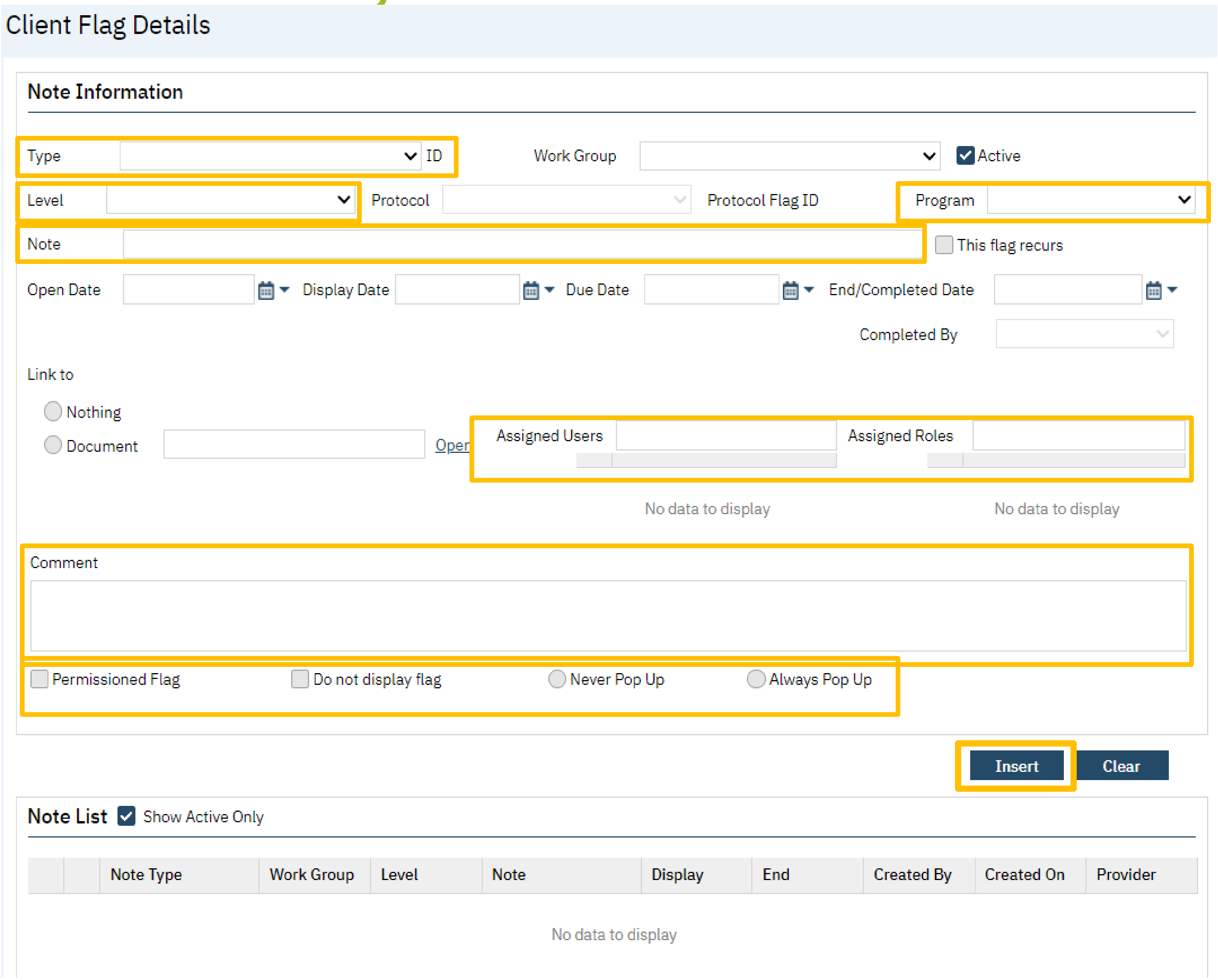


How to Add at Flag

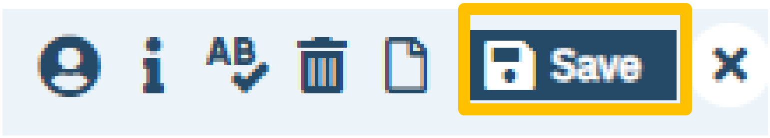


1. Open the client
2. Click on the plus icon next to the client’s name
   a) This will take you to the Client Flag Details screen

Client Flags



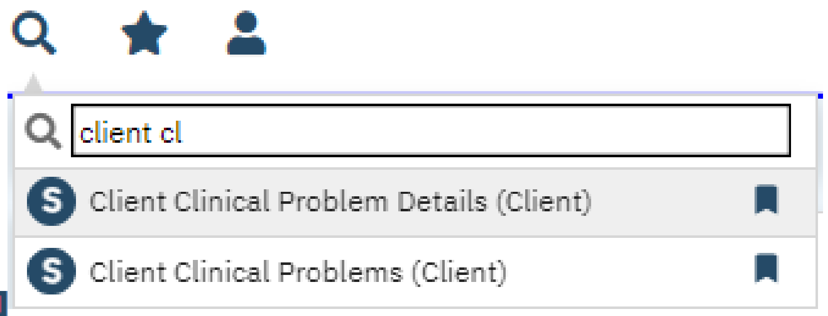
a. **Select the type of flag**. (Early Intervention Services EIS and Minor Consent client)
b. Make sure to **include your program**.
c. **Select the level of the flag**.
d. Enter a “Note” of the flag in the Note field.
e. **Enter the display date**.
f. If you need to assign this task to a specific user, you can enter that information in.
g. Enter any additional comments as needed.
h. You can also choose how the flag is displayed.
i. Once you’ve entered all the information, **click Insert**.
j. Click **Save** once complete

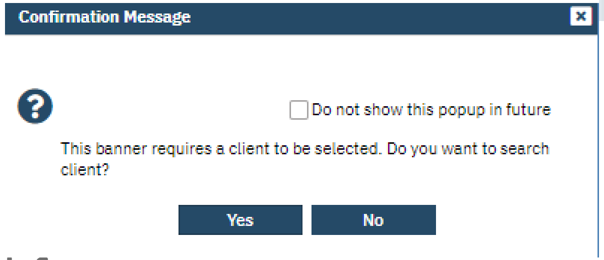


CLIENT CLINICAL PROBLEMS (CLIENT) AKA PROBLEM LIST

Client Clinical Problems (Client)

1. Search for Client Clinical Problems (Client)
   - This is the Problem List
   - This is **<u>ONLY</u>** require for Perinatal Clients (If your program is Certified for Perinatal services)



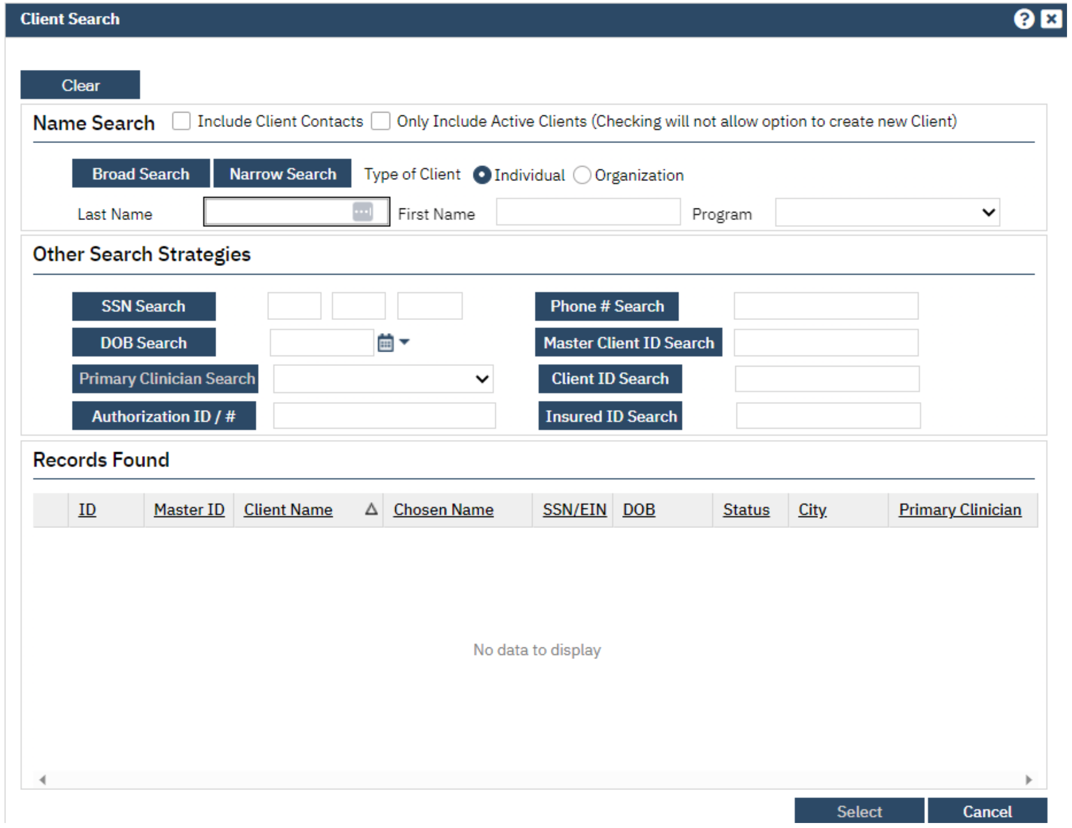


2. If it gives you this message

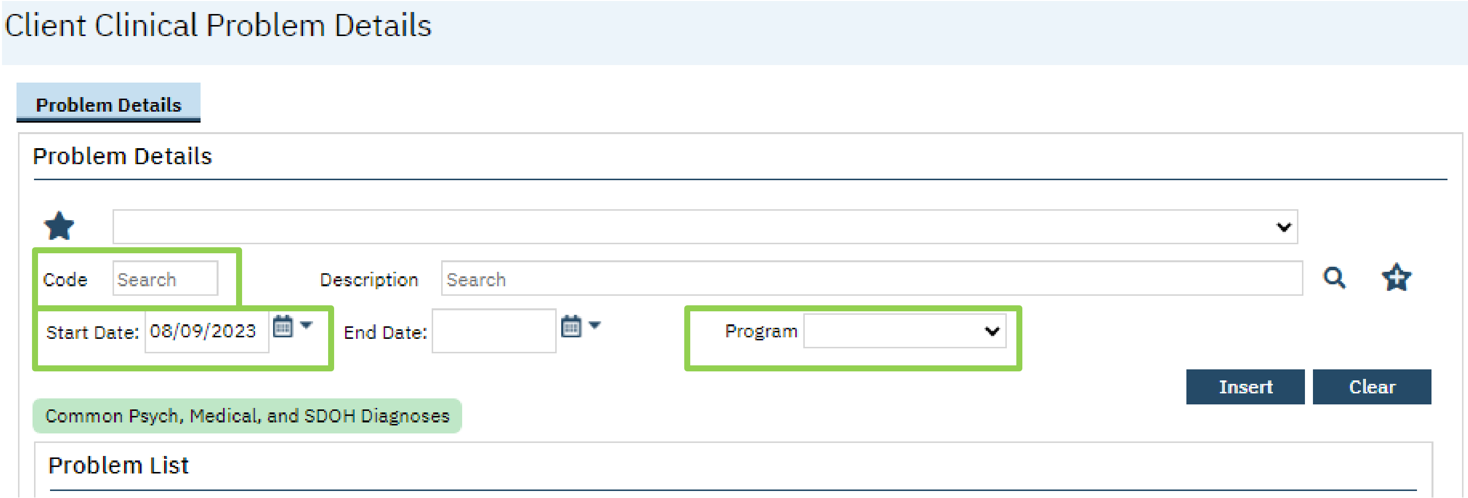
   a) click yes, you can also disable this by checking the box

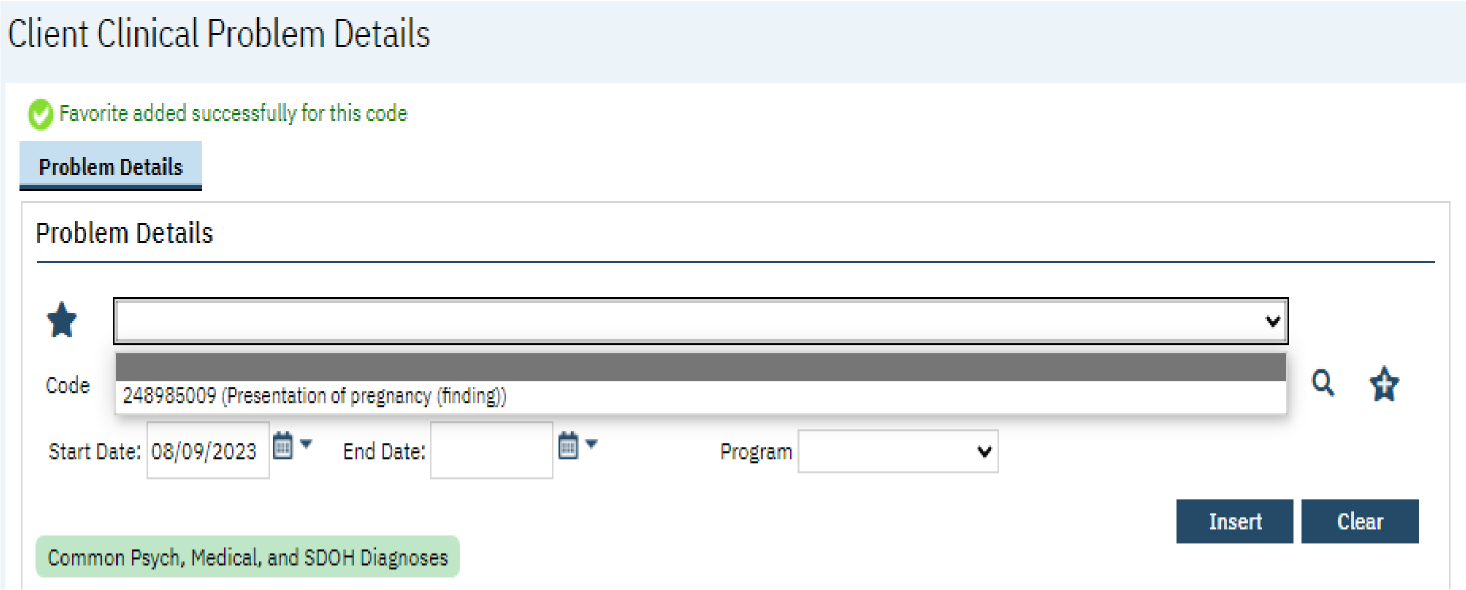
   b) enter name or client ID and "Broad search" or "Narrow Search"

   c) Once you find the person click "Select"

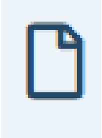


Client Clinical Problems (Client)





3. The Client Clinical Problems (Client) form will open

4. You will add a new problem by clicking the new Icon 

5. Client Clinical Problems Details Screen will open

6. Search: Code **Z34.90,** Description **Presentation of pregnancy (finding)** or **SNOMED: 248985009** click *Insert*

- Make sure your **Start date** is correct
- You Choose your program
- Note you can click the star before insert and it will be saved to your drop down field
- Do not put an end date at this time

QUESTIONS?

THANK YOU

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Additional Resources

- SUD SmartCare Lite User Guide

  This was sent by SAS Inbox prior to Go Live

- CalMhsa Website

  2023.calmhsa.org

- Moodle Trainings

  https://moodle.calmhsalearns.org/login/index.php