

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

The top-left portion of the slide features a series of thin, black, overlapping lines that form a complex, abstract geometric pattern. These lines create various polygons and shapes, some of which are nested within others, giving the impression of a dynamic, interconnected network or a stylized architectural structure. The lines vary in length and orientation, contributing to a sense of movement and complexity.

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?

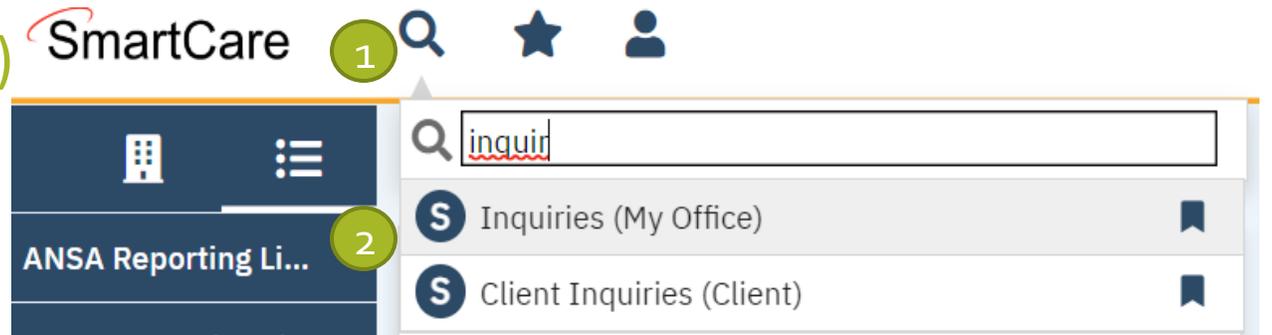
- You complete an Inquiry when a request is made
- Inquiries do not all result in enrollment and/or need Timeliness Record form

- 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

Client Search

Clear

Name Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client Individual Organization

Last Name First Name Program

Other Search Strategies

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
No data to display								

Select Cancel

Inquiry (New Client)

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 "99999999"
 - Complete Urgency Level, Inquiry Type and Contact type fields
 - Click Save

Inquiry Details

Remove Client Link Link/Create Client Register Client AB [trash] [print] Save X

Initial Insurance Demographics

Inquirer Information Crisis

Relation To Client First Name Middle Name Last Name Client ID Sex

Call Back Ext

Start Date Start Time

Client Information (Potential)

First Name Middle Name Last Name Client ID Sex

SSN SSN Unknown/Refused DOB Age (23 Years)

Home Phone Cell Email

Address1 Urgency Level i

Address2

City Inquiry type

State Zip Contact type

Presenting Problem

Current Client Information (If any)

Client Id: 146304
Last Inquiry Date: 07/12/23

Coverage History
No Coverage History

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 need to click on the following: "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

Remove Client Link **Link/Create Client** Register Client AB [trash] [print] Save [close]

Client Search [help] [close]

Clear

Name Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client Individual Organization

Last Name One [dropdown] First Name Patient1 Program [dropdown]

Other Search Strategies

SSN Search 999 99 9999 Phone # Search [input]

DOB Search 05/06/2004 [calendar] Master Client ID Search [input]

Primary Clinician Search [dropdown] Client ID Search [input]

Authorization ID / # [input] Insured ID Search [input]

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/> 113422	[redacted]			266	05/06/20...	Inacti...	Fresno	
<input type="radio"/> 18009	[redacted]			8462	05/06/20...	Inacti...	PARLIER	
<input type="radio"/> 18584	[redacted]			7212	05/06/20...	Inacti...	Fresno	
<input type="radio"/> 65551	[redacted]			747	05/06/20...	Inacti...	Fresno	
<input type="radio"/> 9546...	[redacted]			8458	05/06/20...	Inacti...	Fresno	
<input type="radio"/> 118262	[redacted]			8520	05/06/20...	Inacti...	Sanger	

2 Select Cancel

1 Create New Client Record

Inquiries Continued...

Referral Resource ⓘ

Referral Date  Referral Type Referral Subtype ⓘ

Organization Name Phone 

First Name Last Name

Address Line 1 Address Line 2

City State Zip Email

Comments

Inquiry Handled By ⓘ

Recorded By Information Gathered By

Program Gathered By Other

Location Assigned To

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

Inquiry Details Remove Client Link Link/Create Client Register Client AB 🗑️ 🖨️ 💾 Save ✕

Initial **Insurance** **Demographics**

Electronic Eligibility Verification

Payer Medi-Cal Insurance Id Verify...

Coverage Information Show Current Plans Only

Plan	Insured ID	Group ID	Comment	Add
Coverage Information				
<input type="text"/>				

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

Initial **Insurance** **Demographics**

Identifying Information (Optional)

Gender Identity: Pronoun: Sexual Orientation:

Language

Primary/Preferred Language: Client does not speak English Interpreter Services Needed

Transportation Information

Transportation Service
Note any special needs accommodations (e.g. wheelchair, service animal, high rise)

Preferences

Communication Preference: Days: M T W Th F Geographic Location:
Comment:

Inquiry Details

Remove Client Link Link/Create Client Register Client    **Save**

Initial Insurance Demographics

Referral Date Referral Type Referral Subtype 

Organization Name Phone 

First Name Last Name

Address Line 1 Address Line 2

City State Zip Email

Comments

Inquiry Handled By

Recorded By Information Gathered By

Program Gathered By Other

Location Assigned To

Disposition

Select Disposition

Select Service Type

Select Provider/Agency

[Add Provider](#)

[Add Service Type](#)

Assigned Staff  Assigned WorkGroup 

Disposition Comments

[Add Disposition](#)

End Date  End Time **Now** Status

Inquiry continued...

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

11. Click Save



The top-left corner of the slide features a series of thin, black, overlapping lines that form a complex, abstract geometric pattern. These lines intersect to create various triangular and polygonal shapes, some of which are nested within others, creating a sense of depth and movement. The lines are thin and black, contrasting with the solid green background.

**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

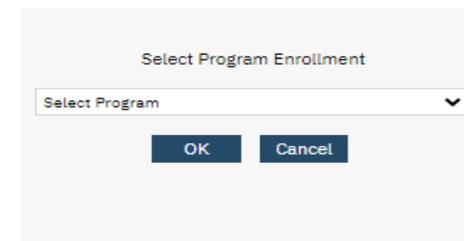
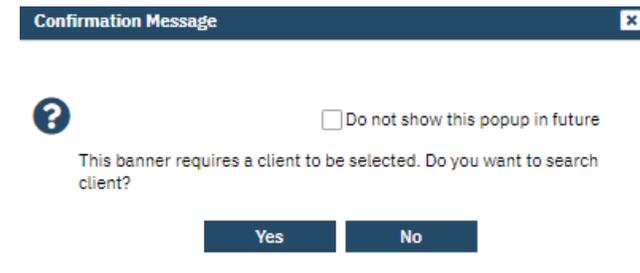
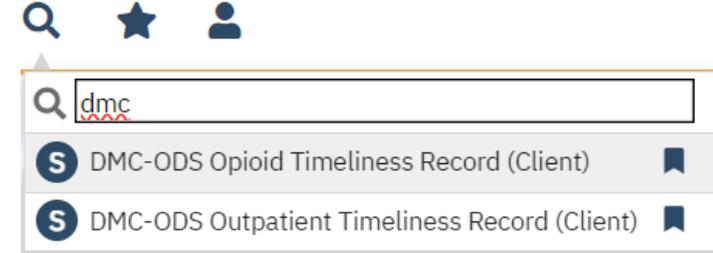
a) click yes, you can also disable this by checking the box, the Client search screen will open

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 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"

DMC-ODS Outpatient Timeliness Record

Effective 10/18/2024 Status New Author Rosel-Bucio, Mayra 02/08/2024 Sign

DMC-ODS Outpatient Timeliness Record

This is only required for Medi-Cal beneficiaries who are making an initial request for outpatient substance use disorder treatment services.

Initial Request and Appointment

Referral Source: Date of First Contact to Request Services: Time:

Appointment Type: ⓘ

Urgent (if selected, time fields are required) Prior Authorization Required

First Service Appointment Offered Date: Time: First Service Appointment Rendered Date: Time:

Reason for Delay:

If other, explain:

Referred to an out-of-network provider Yes No Details:

Follow-Up

Follow Up Appointment NOT Offered

First Follow Up Appointment Offered Date: First Follow Up Appointment Rendered Date:

Documentation of clinical appropriateness of wait time extension: (If documented in a progress note, indicate the date of this progress note "see progress note dated XX/XX/XXXX")

Closure

Closure Date: Closure Reason:

If other, explain:

?

Timeliness Record continued

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

DMC-ODS Outpatient Timeliness Record

Effective 01/03/2024 Status Signed Author Rosel-Bucio, Mayra Sign 

Document

PdfBytesHandler.axd 1 / 1 | - 125% +

Client: Patient_One
ID #: 1
DOB: 1/1/1950

DMC-ODS Outpatient Timeliness Record
Effective Date: 1/3/2024

 Department of Behavioral Health

The top-left portion of the slide features a complex, abstract pattern of thin, black, overlapping lines that form various geometric shapes and angles, creating a sense of movement and depth. The rest of the slide is a solid, vibrant green color.

CLIENT FLAGS

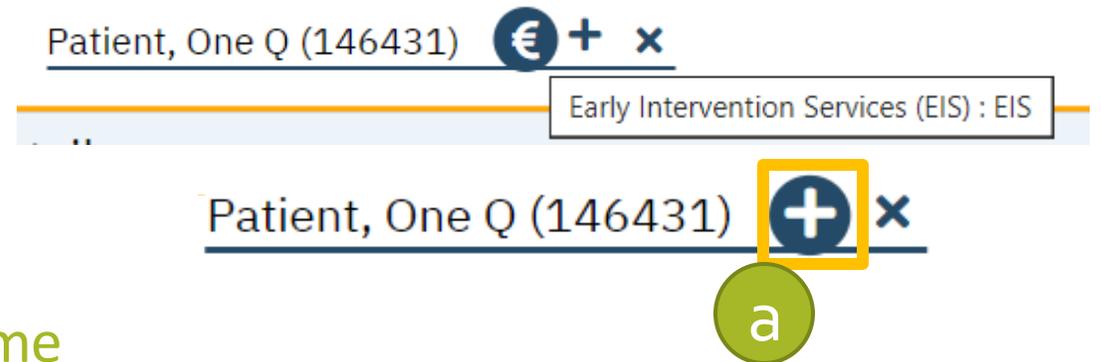
Client Flags

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 flagged 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 a 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

Client Flag Details

Note Information

Type ID Work Group Active

Level Protocol Protocol Flag ID Program

Note This flag recurs

Open Date Display Date Due Date End/Completed Date

Completed By

Link to

Nothing

Document [Open](#)

Assigned Users Assigned Roles

No data to display No data to display

Comment

Permissioned Flag Do not display flag Never Pop Up Always Pop Up

Insert

Clear

Note List Show Active Only

Note Type	Work Group	Level	Note	Display	End	Created By	Created On	Provider
No data to display								

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



The top-left corner of the slide features a series of thin, black, overlapping geometric lines that form a complex, abstract pattern of polygons and triangles. The rest of the slide is a solid, light green color.

CLIENT CLINICAL PROBLEMS (CLIENT) AKA PROBLEM LIST

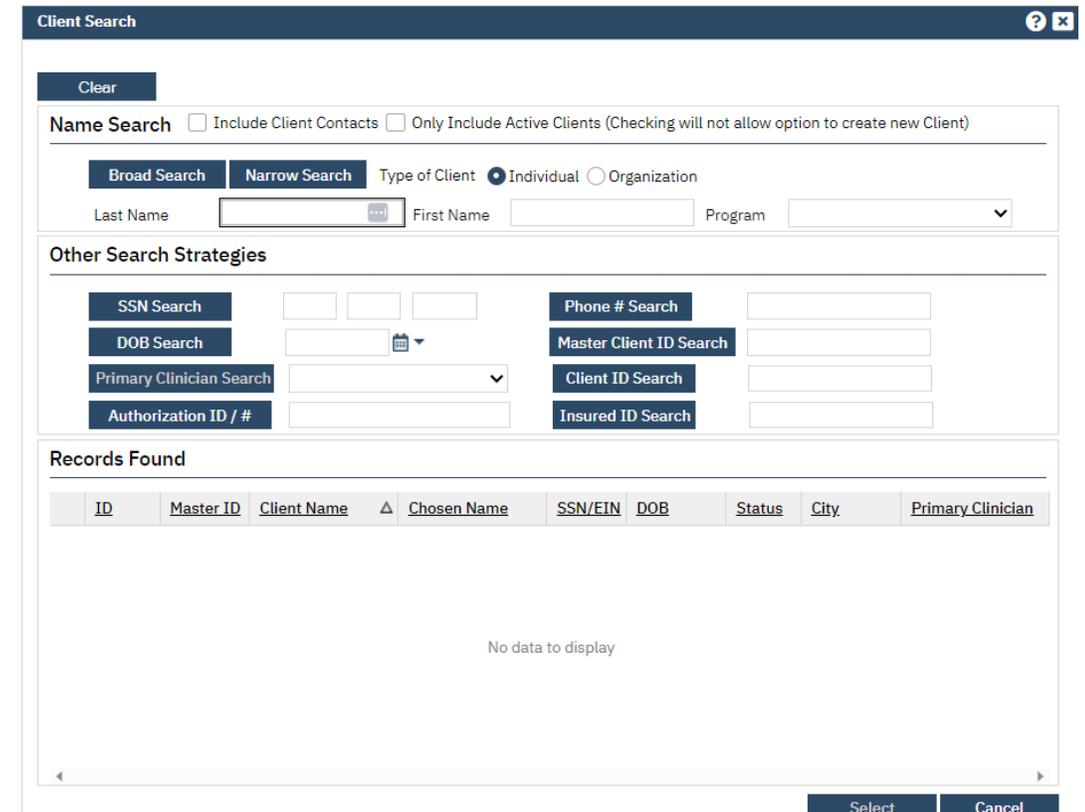
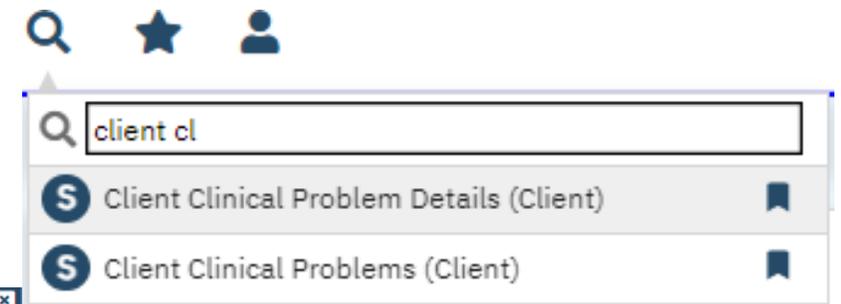
Client Clinical Problems (Client)

1. Search for Client Clinical Problems (Client)

- This is the Problem List
- This is **ONLY** 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)

Client Clinical Problem Details

Problem Details

Problem Details

★

Code Search Description Search 🔍 ☆

Start Date: 08/09/2023 📅 End Date: 📅 Program

Common Psych, Medical, and SDOH Diagnoses

Problem List

Insert Clear

Client Clinical Problem Details

✔ Favorite added successfully for this code

Problem Details

Problem Details

★

Code 248985009 (Presentation of pregnancy (finding)) 🔍 ☆

Start Date: 08/09/2023 📅 End Date: 📅 Program

Common Psych, Medical, and SDOH Diagnoses

Insert Clear

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>