

SMARTCARE WORKFLOW FOR CLUBHOUSES

Step	Action	What is it Called in SmartCare	Staff	Resources/ Guidance
1.	Look up member in the system.	<i>Inquiries (My Office)</i> DO NOT USE DISPOSITION SECTION	Any staff with SmartCare access	Search by name, DOB, and SSN before you can create a new member in the system. How to Document an Inquiry - 2023 CalMHSA
2.	Complete Timeliness Record (TADT)	<i>MH Non-Psychiatric SMHS Timeliness Record</i>	Any staff- If completed on paper, info must be entered into SmartCare in a timely manner	*NOABD to be completed if timeliness is unable to be met. MH Access Times Tip Sheet How to Document Timely Access Record Information for TADT - 2023 CalMHSA
3.	Enroll member	<i>Client Programs (Client)</i>	Any staff with SmartCare access	How to Add the Client to Your Program - 2023 CalMHSA
4.	Complete consents	<i>ASCM I (Non-AB 133 form) (if one has not yet been completed- only one needed per member. Must be updated annually)</i> <i>Consent to Treat (Client)</i> <i>Consent for Telehealth (Client)</i> <i>Consent for Text Communication (Client) - (if applicable)</i> <i>Consent for Email Communication (Client) - (if applicable)</i>	Any staff- If completed on paper, info must be entered electronically (i.e. not scanned) SmartCare in a timely manner	Must use: ASCMI must be completed electronically in SC (even if member declines to sign). All other consents are optional and should programs choose to use their own, they can scan copies into the system as needed. How to Complete the ASCMI - 2023 CalMHSA

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5.	Complete required State forms	<i>CSI Standalone Collection</i>	Any staff with SmartCare access	How to Complete a CSI Demographic Record - 2023 CalMHSA
6.	IF APPLICABLE: UMDAP Client Plan Request Form	<i>UMDAP Financial Assessment (Client)</i> (if one has not been completed- only one per member. Updated annually) Paper Document - (if one has not been completed- only one per member. Updated annually)	Any staff with SmartCare access	UMDAP Financial Assessment in SmartCare How to Complete the SmartCare Client Plan Request Form Optum Website> SmartCare Tab> <i>Billing</i>
7.	Complete assessment	<i>Mental Status Exam (Client)</i> <i>Mental Health Assessment (Client)</i>	Information may be gathered by any staff but specific sections may only be completed by a licensed, waived, registered staff: the MSE, diagnosis and clinical formulation	Mental Health Assessment - 2023 CalMHSA
8.	IF APPLICABLE: Identify special population	<i>Special Populations (Client)</i>	Any staff with SmartCare access	How To Identify a Client as Special Population - 2023 CalMHSA
9.	Establish diagnosis	<i>Diagnosis Document (Client)</i>	Only LPHAs have access in SmartCare	How to Document a Diagnosis - 2023 CalMHSA
10.	Establish problem list	<i>Client Clinical Problem Details</i>	Any staff with SmartCare access	* To complete if NOT done during the assessment phase or not being done when completing the note.
11.	Write a note	<i>ISL Client Non Billable Svc Must Document</i>	Any qualified staff.	See "Clubhouse Handbook" > Service Note section

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12.	Admin Service Entry	<i>Services (Client)</i>	Any staff with SmartCare access	Clubhouse Admin Service Entry
13.	Discharge	<i>CSI Standalone Collection (Client)</i> <i>Client Programs (Client)</i> <i>CalMHSA Discharge Summary (Optional)</i>	Any staff with SmartCare access	** NOABD may needed depending on reason for discharge. How to Complete a CSI Demographic Record - 2023 CalMHSA How to Close a Client to a Program - 2023 CalMHSA How to Complete the Discharge Summary - 2023 CalMHSA