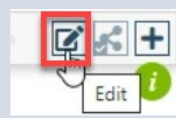
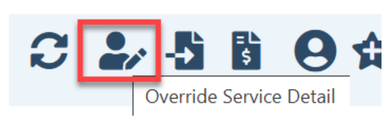
SmartCare Services
How To Guide

Who	Status & Action	Data Correction	Resolution Steps
Clinician	**Show Status** **Correct Service and/or Note**	Examples: Service Details • Start Date • Start Time • Service Time • Program • Location • Mode Of Delivery • Evidence Based Practices Note Content	Search for and select client. ***Unsigned Note*** 1. Launch Services/Notes (Client) **or** My Services (My Office). 2. Select DOS. 3. Make necessary edits on Service tab and Save. 4. Select Note tab. 5. Make necessary edits and Sign. ***Signed Note*** 1. Launch Services/Notes (Client) or My Services (My Office). 2. Select DOS. PDF displays. 3. Click Edit.  4. Click Ok on Confirmation Message window. 5. Make necessary edits on Service tab and Save. 6. Select Note tab. 7. Make necessary edits and Sign.
Front Desk Admin **Supervisor**	**Show Status** **Correct Service**	Examples: Service Details • Procedure • Start Date • Start Time • Service Time • Program • Location • Mode Of Delivery • Evidence Based Practices	1. Search for and select client. 2. Launch Services/Notes (Client). 3. Select DOS. 4. If service detail fields are greyed out, click Override Service Detail.  5. Make necessary edits on Service tab and Save.

For more information or questions, contact the CalMHSA help desk via one of the options available here.

For more information, go to OptumSanDiego.com and click on the SmartCare tab under MHP Provider Documents for the MH SOC; or DMC-ODS for the SUD SOC.

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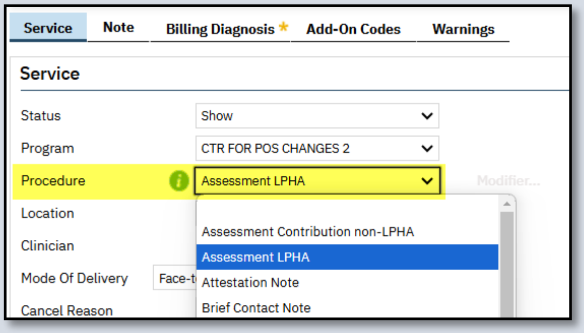
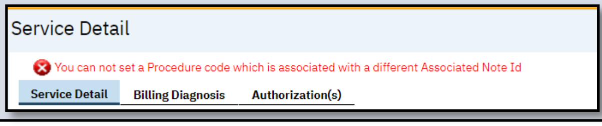
Clinician	**Show Status** **Correct Procedure with Note**	The procedure can be changed when the note type for the original procedure is the same as the note type for the updated procedure. For example, Assessment LPHA can be changed to Individual Counseling because they both have the Progress Note type.  If the new procedure does not have the same note type as the original procedure, the system will generate the error "You cannot set Procedure code which is associated with a different Associated Note Id". For example, an Assessment LPHA (Progress Note) cannot be changed to Medication Training and Support (Psych/Medical Note) because they are two different note types. 	***Same Note Type:*** Follow the directions to Correct Service and/or note and change the Procedure on Service tab. ***Different Note Type:*** Submit the correction request using My Reported Errors.
Clinician **Front Desk Admin** **Supervisor**	**Show Status** **Change a billable service to non-billable**	When a billable service is entered for a client, but it should not be billed, the service needs to be changed from billable to non-billable.	1. Search for and select client. 2. Hover mouse over client's name and select *Services* from the fly-out menu. 3. Select appropriate *DOS* link on *Services* list page. 4. On the Service Detail tab use *Procedure* dropdown to select an appropriate non-billable procedure code. Click *Save.*

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Clinician **Front Desk Admin** **Supervisor**	**Show Status** **Change a billable residential bed day procedure to non-billable**	Client accounts are in billable status by default. SmartCare will generate bed day services automatically while a client is admitted to a residential program. When the client receives services not qualified to bill a bed day, the procedure code must be changed from billable to non-billable. Note: SmartCare automatically records Bed Day procedures as of 11:59pm on the current day. Report service corrections required for services in *Complete* status using the My Reported Errors process.	1. From the Residential (My Office) list page, locate the client. 2. Click the dropdown in *Status* column and click *Billing Code Change* link. 3. The *Census Management – Billing Code Change* screen displays. Verify *Start Date* and *Time* are correct. 4. Click *Billing Procedure* dropdown, select *Non-billable Bed Procedure* and click *Modify.* 5. The client must be reverted to the previous bed procedure for charges to resume.
Clinician **Front Desk Admin** **Supervisor**	**Show Status** **Change a billable procedure already covered by the billable residential bed day charge to a non-billable one**	If a service entered for a client admitted to a residential program is already covered by the bed day charge, the service needs to be changed from a billable procedure non-billable. Note: Report service error corrections required for services in *Complete* status using the My Reported Errors process.	1. Search for and select client. 2. Hover mouse over client's name and select *Services* from the fly-out menu. 3. Select appropriate *DOS* link on *Services* list page. 4. On Service Detail tab, use *Procedure* dropdown to select an appropriate non-billable procedure code. Click *Save.*

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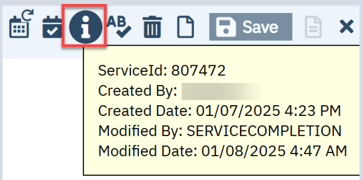
Clinician **Front Desk Admin** **Supervisor**	**Complete Status** **Report Service Correction Using My Reported Errors**	Data cannot be corrected by the Program once service status is Complete. Examples: • Inaccurate service details • Documentation on wrong client • Service billed in error • Service status incorrectly changed to Error	Submit the correction request using My Reported Errors. • Report an Error that Needs to be Corrected • Report an Individual Service Note Error • Report a Group Service Note Error To expedite the resolution process, please include the following service information: • Service ID* • Date of Service • Start Time • Procedure • Clinician *Service ID which can be located by opening the Service and hovering on the "i" in the upper right corner. 
Front Desk Admin **Clinician** **Supervisor**	**Complete Status** **Re-enter Note**	Notes cannot be modified by the Program once service status is Complete. Note re-entry will be required when: • Service note was entered on wrong client • Procedure change requires a different note type • Service status was incorrectly changed to Error	1. Submit the correction request using My Reported Errors. Service/Note status will be changed to Error by the System Administrator. 2. Confirm Service/Note status has been marked Error before creating new note. 3. Enter new Service/Note.

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Clinician **Front Desk Admin** **Supervisor**	**No Show Status** **Document Additional Information for a Scheduled Appointment for which the Client is a No Show**	When a client does not show for a scheduled appointment, but a billable service related to the client is performed during the scheduled time, the service needs to be documented. Examples: • Review client chart • Discuss case with treatment team • Travel to meet client for scheduled appointment	1. If the Client was a No-Show and did not cancel their scheduled appointment, change the service status to "No Show" (see link below). 2. If a billable service is provided during the time which would have spent with the client, mark the scheduled appointment as a no-show and create a new, unscheduled service to document the service which was provided. 3. If a non-billable note is needed to document any time spent preparing for the appointment or attempting to contact the client, mark the appointment as a no-show and create a new unscheduled non-billable service to document any information needed. • How to Document a No-Show Appointment - 2023 CalMHSA
All Staff	**Clearing CoSD Service Error Report (My Office)**		Please refer to the **Clearing CoSD Service Error Report (My Office)** on the Optum website.

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