Table of Contents

First Time Logging In.................................................................................................................................................. 1
SmartCare Basics.......................................................................................................................................................... 3
Open a Client ............................................................................................................................................................... 4
How to view Authorization Information.................................................................................................................. 5
How to enter a claim or non-billable note .................................................................................................................. 7
How to view a claim ...................................................................................................................................................... 10
To Edit a Claim ......................................................................................................................................................... 11
How to Create and Complete Authorization Requests .......................................................................................... 12
Uploading Documentation ......................................................................................................................................... 13
Where are the Documents in the Client’s Record? ...................................................................................................... 15
Open the Provider ....................................................................................................................................................... 16
First Time Logging In

The first time you log in to the SmartCare system, follow these steps:

1. At the login page, you will be required to enter your user name and password. After entering these two pieces of information, click the Login button.

2. You may get this pop up that is telling you that you need to reset your password:

3. Click the 'OK' button in this popup.

   - You will then be taken this screen:

4. Enter your password you just used to login in the 'Old Password' field.

5. Enter a new password in the 'New Password' field.
   
   1. Your new Password **MUST** be at least 8 characters long and contain at least 1 special character.

6. Enter the new password again in the 'Confirm Password' field.

7. Click the Ok button.
8. You will then be taken to the login screen again, where you enter in your New Password and click the Login button.

The system will now ask you to set security questions. **The answers you enter are case sensitive** so remember if you use capital letters. To set your security questions, do the following:

1. Choose a question to answer for the Security Question 1 field.
2. Answer the question in the Answer field just below Security Question 1.
3. Repeat this for Security Question 2 and Security Question 3
4. Click the Save button.
SmartCare Basics

There is terminology that will be used throughout the training materials. Here is a basic overview of the SmartCare System and the terminology of the system:

1. Tabs - The tabs are at the top of the page. The dark blue tab is the tab you are currently on in the system. The White tabs are other tabs you have open and can move to by clicking on the tab. The tabs available to you are listed below.
   - My Office tab - This tab contains the information for all clients. This includes all claims for your clients, all authorizations for all clients, etc.
   - Client Tab - The client tab will display the client’s name and ID. This is the client’s specific record and only contains information about that specific client. Only one client record can be open at a time.

2. Banners - Banners are the white buttons listed on the left side of the screen. Banners are the different screens that you can open within each tab. Clicking on a banner will take you to that screen.

3. Screens - Screens are the information that displays just to the right of the banner. The Screen name is in Red at the top of the screen.

4. Filters - In each screen that is a list page, there are filters at the top of the page. The filters help to narrow down the information. Remember to click Apply Filter to make the changes to the filter settings apply.

5. History - The blue ‘H’ history button at the top right of the screen is used to help you go back to pages you have been in while you have been logged in to the system.

6. Logout - The red circle button at the top right of the screen next to the History button is used to log out of the system.
Open a Client

To open a client, complete the following:

1. At the top right of the screen, find the 'Open this Client' drop down. It is in the blue strip at the very top right of the screen. Click on the drop down and then in the drop down click on the '<Client Search>' option.

2. The Client Search pop up will open.
   - At the very top right of the pop up is the list of the provider names you are associated with. If you are associated to more than one provider, you can search for all you are associated with.
   - Search by Name by entering in last and first name information and using the Broad Search or Narrow Search button. Broad Search looks for names similar to the name you entered. Narrow Search looks for exact matches.
   - Search by Client ID using the 'Client ID Search' button.
   - Search by Social Security Number using the SSN Search button.
   - Search by Date of Birth using the DOB Search button.

3. Click on the circle button next to the ID number for the record you want to open.

4. Then click the Select Button at the bottom right of the pop up to open the record.
How to view Authorization Information
There are two pages that can be used to view authorization information for providers.

Client Tab: CM Client Authorizations

In the client's tab, click the CM Client Authorizations banner.

• This will open the list of the client's authorizations. You can see authorizations on this page based on the Providers and Insurers you are permissioned to see. Each row is an authorization for the client.

• You may view an "Authorization document" by checking the box for a specific line, or choose "all", to see more detailed information for a client.

Choose the printer icon in the upper right of the screen. - A pdf of the information will open for your review or printing.

My Office Tab: CM Authorizations
1. In the My Office tab, click on the CM Authorizations banner. This banner has all authorizations for all clients. The list page displays all authorizations individually. Each row is displaying one authorization's information. The information includes:

- Client name
- Provider and site authorized for services
- Billing code authorized for services
- Status of the authorization - the status include:
  - Approved = the authorization has been reviewed and is approved. Authorizations in this status can be used for payment of claims.
  - Requested = the authorization is requested but not yet reviewed. Authorizations in this status cannot be used for payment of claims.
  - Pended = the authorization has been reviewed but made pended for some business process reason. Authorizations in this status cannot be used for payment of claims.
  - Denied = the authorization has been reviewed and is denied. Authorizations in this status cannot be used for payment of claims.
  - Partially Approved = the authorization has been reviewed and some of the total units requested are approved. Authorizations in this status can be used for payment of claims.
  - Closed = the units approved on an authorization have all been used in the payment of claims. Authorizations in this status cannot be used for payment of claims.
- From and to dates of the authorization
- Due date the authorization must be reviewed if requested is the status
- Units used
- Units approved
- Units requested.
- Authorization number is the assigned number to identify the authorization.
- ID number is the system identified number for the authorization.

2. Use the filters at the top of the page to find an authorization you are looking for.

- You can use the status filter to find approved authorizations to see the number of units approved vs. the number of units used.

3. Use the Export tool (blue floppy disk) in the tool bar at the top right of the screen to export the information on the list page to Microsoft Excel.
How to enter a claim, first contact, or non-billable note

1. Open the client.

2. In the client's banner, click Claims.

3. For each claim follow these steps:

   Click PP tool to enter a new claim. Please only enter one client claim per claim entry – and only one date per claim. After you enter and save a service, exit back to the Client Claims screen before choosing to add another claim.

Claim Form Page

4. The form will open. In the client Provider Section fill out the following:
   - Auth # - This field is optional.
   - Provider and Site - Click on the Provider button to open a search pop up.
     - In the pop up, use the Provider Name and Site Name fields to search for the provider you are looking for.
     - Click the radio button (circle) next the provider and site name you want to select for this claim.
• Click the Select button and this provider and site will be added to the claim.

• Insurer – Use the drop down to select the Insurer for the claim.

5. Complete the Claim Header Section:
   • Patient Account No. - This field auto populates by the system with the client's ID.
   • Diagnosis - If this field is blank, you must enter a diagnosis code. For child welfare, *non-clinical* services please use Z69.010.

6. For each claim, complete the following steps:
   • From and To - Enter the start and end date and time of the service.
   • Code - Choose from the drop down list the billing code of the service.
   • Units – You must enter the in the number of units for the service. Be sure your number of units matches the time of the session. The authorized units for each service are available on the CM Authorization page for the client.
   • Charge - The system will calculate the reimbursement based on the contracted multiplied by the number of units you enter.
   • POS - Choose the place of service from the drop down field
   • Rendering Provider - select the name of the rendering provider, if applicable.
   • Dx - This field will pre-populate from the data entered in the Claim Header section.
   • **IMPORTANT**: Click the **Insert** button prior to entering the notes.
7. To save the claim information, click the green Save button at the top right of the screen, and once saved, select the radio button beside the inserted claim. Please only enter one client claim per claim entry – and only one date per claim. After you enter and save a service, exit back to the Client Claims screen before choosing to add another claim.

8. To enter your session notes, click on the Custom Fields tab at the top of the page.
9. Click the green Save button at the top right of the screen.
10. For each non-billable note, complete the following steps:
    - From and To - Enter the start and end date, time is not required
    - Code - Choose “NOTES” as the code for entry of non-billable information
    - Units – The number of units should always be “1”.
    - Charge - The charge should populate at $0.00
    - POS - Choose the place of service from the drop down field
    - Rendering Provider - select the name of the rendering provider if applicable.
    - Dx - This field will pre-populate, if a previous dx was entered for the client on the claim screen. You must have an entry in this field.
    - IMPORTANT: Click the Insert button to prior to entering the notes.

11. To enter your non-billable notes, click on the Custom Fields tab at the top of the page.
12. To save the note information, click the green Save button at the top right of the screen.
13. To enter the **First Contact** date for a client, complete the following steps:

- **From and To** - Choose the start and end date for the first contact with the new client.
- **Code** - Choose from the drop down list, choose the appropriate “FC1…” to capture the first date of contact. Example: FC1HBOB – Homebased service; FC1LS – Life Skills service.
- **Units** – The number of units should always be “1”.
- **Charge** - The charge should populate at $0.00.
- **POS** - Choose the place of service from the drop down field.
- **Rendering Provider** - select the name of the rendering provider, if applicable.
- **Dx** - This field will pre-populate, if a previous dx was entered for the client on the claim screen. You must have an entry in this field. For child welfare, non-clinical services please use Z69.010.
- **IMPORTANT**: Click the **Insert** button - then save the first contact information.

14. To save the first contact information, click the green Save button at the top right of the screen.

**How to view a claim**

To view a professional claim, the following steps are followed:

1. Open either the Claims list page in My Office by clicking on the Claims banner or the Claims list page in the client's record.
To Edit a Claim

If the Service Notes section or Service Line need to be edited you would begin from the Claim Lines list page.

Claim information may only be edited in the “Entry Complete” status. Once a claim status is changed to paid, approved, or denied edits are not allowed.

1. Click the Claim Line ID from the list page to go to the client’s claim.

2. Click View Claim Form in the right corner

3. From here you can edit the service line by choosing the radio button by the service line

4. This will bring in the information above, change information to correct and click MODIFY and save.

5. Click Custom Fields tab if the Service note needs to be edited and Save.
How to Create and Complete Authorization Requests

Events are used for documenting clinical information in a client's record. Events are in the CM Events banner within a client's tab. To create and complete an event, complete the following steps:

1. Open the client you want to create an event for.
2. In the banners within the client's tab, click on the CM Events banner.
3. In the CM Events list page that opens, click on the New tool (white piece of paper) in the tool bar at the top right of the screen.

To Create an Authorization Request Event

1. Complete the following fields in the Event tab of the event.
   - Event - In the drop down, choose the Authorization Request
   - Date – This defaults to the current date.
   - Time – This defaults to the current time.
   - Staff - This will default to your name
   - Status - Choose In Progress to complete the event.
   - Insurer – Choose the appropriate Insurer.
   - Provider - The system enters this field
2. Click on the Note tab to open the event.

3. Complete the fields in the Note tab.

4. **IMPORTANT**: Click the **Insert** button to add the request to the Authorization Request List.

5. Click the Sign button in the top right of the event to submit the request for approval. You will be required to enter your password to electronically sign this request.

- If a field is missing that is required an error message will appear in the top left side of screen. Correct any errors and click sign again to submit the request.

**Uploading Documentation**

1. Go to My office and select the scanning banner.

2. Click the Upload New Images button locate on the top right of the screen.

3. Click the select button and select the file from your computer. The file information will appear in the box to the left of the select button.

- You can select multiple documents at one time.
- A document must be in PDF format to be uploaded

4. Click the Upload button.

![Insert File](image)

5. Edit the uploaded document.

- Images included in the scan are displayed on the left hand side of the viewer. Clicking on these thumbnails will display the image in the main display window.
- Clicking the Save button saves the Scanned document information.

6. The following buttons are available to edit a scanned document.

- Delete Page - Deletes current page of the document in the viewer
- Reload File - Clicking this button deletes the page currently being viewed and inserts a new image that is being scanned on the scanner.
- Reload All - Clicking this button deletes all pages of the document currently being viewed. The application will replace these pages with the new pages that are placed in the scanner.
- Insert File - Inserts a new scanned image directly after the page currently being viewed.
- Append page - Allows you to append a page to the end of the document.

![Upload File Detail](image)

7. Select Client (Events) in the first drop down at the top of the page and search for the client to associate the document to by clicking the Client button.
8. The Client Search Box will display. Select the client name.

9. Select Record Type from the drop-down list.

10. Select the date from which the document is effective

11. Enter a description as applicable

12. Save the image. There is also a delete button that will delete the scanned document.

Where are the Documents in the Client’s Record?
To view a completed scanned document in a client's record, perform the following steps:

1. Open the client's record using the client search to find the record you want to open.

2. In the Client’s record click on the Documents banner.

3. In the list of Documents you will see all of the documents with the Record Type you selected when scanning as the name of the event. Click on the name of the event to open and view the document.
Open the Provider

To view your provider information, open your Provider tab in the system. This tab contains the contract Provider Summary. To open the provider tab, follow the steps outlined below:

1. In the top right of the screen, click on the Open this Provider drop down (circled in red below).

![Image showing the Open this Provider drop down]

2. The drop down will display the provider names you are permissioned to see. Click on the provider name for the provider information you wish to open.

![Image showing the open provider interface]

3. This will open you to the Provider Summary Page where you can see an overview of information.