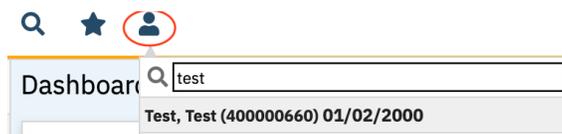


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## A. Locate an Available Bed

1. Open the chart for the individual you would like to admit by clicking on the **Client Search** icon at the top of the screen, typing in the client’s name and choosing them from the drop down list.

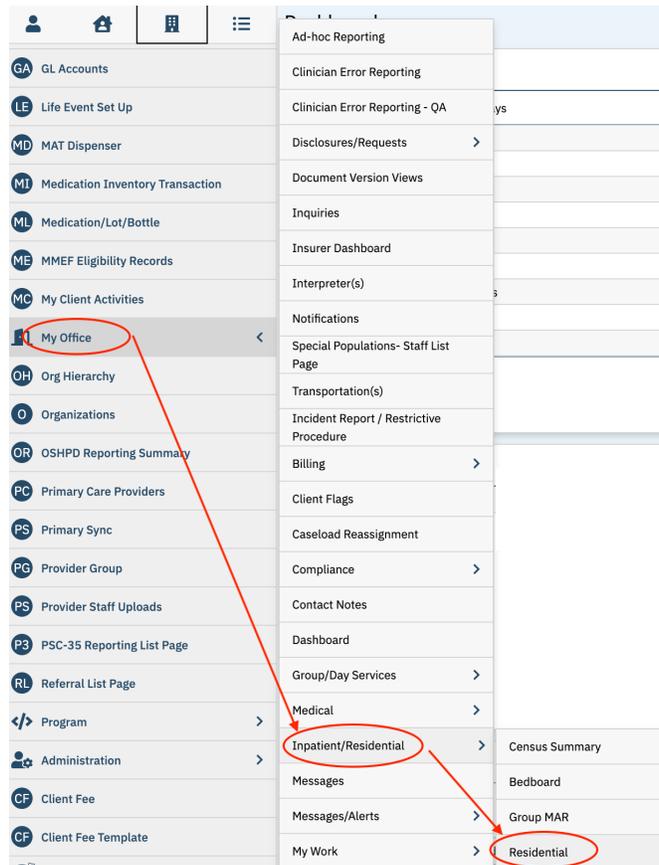


2. Levels 3.1, 3.3, and 3.5 clients should be in the system. Contact Access if you are unable to find an individual with one of those levels.
3. Detox 3.2 providers can create and enroll new clients and should notify AODS of the possible need to merge duplicate clients in the system by emailing [AODSMerges@cchealth.org](mailto:AODSMerges@cchealth.org) with name, ID#, DOB, and SSN if available.
4. With the client’s chart open in SmartCare, access the Residential screen using one of these two methods:

- a. Click on the magnifying glass icon at the top left of your SmartCare screen and type residential in the form search box; click on **Residential (My Office)**



b. Follow this menu path: My Office > Inpatient/Residential > Residential



- Once you have the Residential screen open, from the **All Statuses** drop down list, select **Open** to see all available beds. Make sure that the date in the filter is **today's date** so that you can see all available beds as of today. Make sure the correct program is selected from the **All Programs** drop down list. Choose any other desired filters and click on **Apply Filter**.

#### Residential (2)

- From here you can see all the available beds.

#### Residential (2)

| Client Name | Note | Flags | Bed        | Status | Admitted | Discharged | Program | Room       | Unit          |
|-------------|------|-------|------------|--------|----------|------------|---------|------------|---------------|
|             |      |       | RES TEST 2 | Open   |          |            |         | RES TEST 2 | RESIDENTIA... |
|             |      |       | RES TEST 3 | Open   |          |            |         | RES TEST 3 | RESIDENTIA... |

## B. Admit to a Bed

- Once you've identified an Open bed, in the Status column click on the **Open** drop-down list and select **Admit**.

Residential (3)

All Statuses ▾ 01/30/2024 📅 RESIDENTIAL TEST ▾ Other ▾ Apply Filter

All Units ▾ All Rooms ▾ All Beds ▾

| Client Name | Note | Flags | Bed        | Status   | Admitted   | Discharged | Program          |
|-------------|------|-------|------------|----------|------------|------------|------------------|
| Test_Test   |      |       | RES TEST   | Occupied | 01/29/2024 |            | RESIDENTIAL TEST |
|             |      |       | RES TEST 2 | Open     |            |            |                  |
|             |      |       | RES TEST 3 | Admit    |            |            |                  |

Admit  
Schedule Admission  
Block Bed

- Some information will be auto-populated in the **Census Management – Admit** screen. Verify the following information is correct: **Admit Date and Time, Program, Bed.**
- Enter **Client Type** and **Admission Type**.

Census Management - Admit

**Activity**

4000006 Test\_Test DOB: 01/02/2000 Gender: Scheduled Date/Time:

Action: Admit  Firm  Non-Billable  Hold Bed

Admit Date: 01/30/2024 Time: 4:23 PM Expected Discharge Date: Time: 00:00

Arrival Date: Time: 00:00 Admit Decision Date: Time: 00:00

Emergency Room Arrival: Time: 00:00

Emergency Room Departure: Time: 00:00

Program: RESIDENTIAL TEST

Bed: RES TEST 2

Unit: RESIDENTIAL TEST  Overflow

Room: RES TEST 2  Only show beds for selected program

Admission Type: Client Type:

Admission Source: Comments:

Assignment Type: Reason:

Location: Residential Substan Billing Procedure: Residential Treatm

Clinician: Physician:

- When information is complete, click the **Save & Close** icon at the top right.



## C. Request Additional Beds or a Bed Program Change

1. To request additional beds or to request a bed change, send requests to the SmartCare Support Team at [smartcaresupport@cchealth.org](mailto:smartcaresupport@cchealth.org). The SmartCare Support Team will coordinate requested changes with the AODS QM Team.
2. When request is approved, the SmartCare Support Team will make the change in SmartCare.

## D. Client Leave – Bed Holds

1. To hold a bed while an individual is on leave from the facility, from the Residential screen find the beneficiary/corresponding bed and click the **Status** drop down that says **Occupied**.

| Client Name | Note | Flags | Bed            | Status   | Admitted   | Discharged |
|-------------|------|-------|----------------|----------|------------|------------|
| [REDACTED]  |      | ?     | La Casa Bed 07 | Occupied | 12/04/2023 |            |

2. Choose **On Leave** from the dropdown list. Do not use Bed Change or Transfer.

A screenshot of a dropdown menu with the following options: Occupied, Bed Change, Transfer, On Leave, and Discharge. The 'On Leave' option is circled in red.

3. Enter/verify **Leave Start Date** and click **Save & Close** icon at top right.

A screenshot of the 'Census Management - On Leave' form. The 'Leave Start Date' field is circled in red and contains the date '01/02/2024'. A 'Save & Close' button is circled in red at the top right.

4. Back on the Residential screen, you will see two lines for the individual who is on leave. The first one that says **Went on Leave** is the original and no actions can be taken on this one while the individual is on leave. The second one is the one you will use when the individual returns from leave.

|              |  |             |               |            |
|--------------|--|-------------|---------------|------------|
| Test, Test   |  | RHWC Bed 14 | Went On Leave | 11/30/2023 |
| Test, Test ! |  | RHWC Bed 14 | On Leave      | 11/30/2023 |

- When the individual returns from leave, click on the **On Leave** dropdown and choose **Return from Leave**. Enter/verify return from leave data and click **Save & Close** icon at top right. If the individual doesn't return from leave and is being discharged, choose **Discharge**, enter/verify **Discharge Date**, and click **Save & Close** icon.

A screenshot of a dropdown menu titled 'On Leave'. The menu is open, showing four options: 'Return From Leave', 'Schedule Return From Leave', and 'Discharge'. The 'Return From Leave' option is highlighted with a red circle.

- On Leave, Return From Leave, or Discharge** are the only options you should choose from the **Status** dropdown when the bed is occupied.

## E. Residential Services

- For each day an individual is in a residential bed, complete one daily **Service Note** for each individual.
- To ensure you complete a note for each person, you can start from the Residential screen and click on the person's name to open their chart. You can also start by going directly to a **Service Note (Client)** and selecting a client.
- In the **magnifying glass** form search box type service note and select **Service Note (Client)**.
- Complete the information in the **Service** tab. Select **Residential Daily Note** for the **Procedure** and **Residential Substance Abuse** for the **Location**.
- Enter **Start Date, Start Time**, and 1 day for **Service Time**.

A screenshot of a software interface showing the 'Service' tab. The interface has four tabs: 'Service', 'Note', 'Billing Diagnosis', and 'Warnings'. The 'Service' tab is active. Below the tabs, there are several fields and dropdown menus. A red box highlights the 'Procedure' dropdown (set to 'Residential Daily Note') and the 'Location' dropdown (set to 'Residential Substance Abuse'). Another red box highlights the 'Start Date' field (set to '01/09/2024') and the 'Start Time' field (set to '12:01 AM'). A third red box highlights the 'Service Time' field (set to '1 Days').

- Click on the **Note** tab to complete the daily note.

- You can add a Problem to the **Problem List** if appropriate by entering a code or description in the **Problem Details** section and selecting the problem. Click the **Insert** button when information is complete to populate it into the **Problem List** box.

Progress Note

Effective: 02/14/2024 Status: New Author: Crowder, Traci

Service **Note** Billing Diagnosis Warnings

**General**

**Problem Details**

★ 191811004 (Continuous chronic alcoholism (disorder))

Code: F10.20 Description: Continuous chronic alcoholism (disorder)

Start Date: 02/14/2024 End Date: Program: DISCOVERY HOUSE

Common Psych, Medical, and SDOH Diagnoses

**Problem List**

| SNOMED Description | SNOMED CT Code | ICD 10 Code | Start Date | End Date | Program |
|--------------------|----------------|-------------|------------|----------|---------|
| No data to display |                |             |            |          |         |

- Complete the **Information** and **Care Plan** boxes to document the daily service and plan for the client.

**Problems addressed during this session** Refresh

Continuous chronic alcoholism (disorder)

**Information**

Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).

**Care Plan**

Indicate the goals, treatment, service activities, and assistance to address the objectives of the plan and the medical, social, educational, and other services needed by the beneficiary. Include how the beneficiary or their representative helped to develop the goals, and the progress toward meeting the established goals. Indicate transition plan if the individual has achieved the goals of the care plan.



- b. In the **Diagnosis Document**, enter in the diagnosis code in the **Code** field or the diagnosis name in the **Description** field. A list of matching diagnoses will populate, click to select the appropriate diagnosis.

Diagnosis Document

Effective 01/08/2024 Status New

**Diagnosis**

No Diagnosis

**Diagnosis**

★

Code F10.20 Description alcohol use disorder

F10.20\* - Alcohol use disorder, Severe - 714423004 - Does abstain from drinking

F10.20\* - Alcohol use disorder, Moderate - 714829008 - Moderate alcohol dependence

F10.20\* - Alcohol use disorder, Severe - 714829008 - Moderate alcohol dependence

F10.20\* - Alcohol use disorder, Moderate - 714857001 - Does not abstain from drinking

F10.20\* - Alcohol use disorder, Severe - 714857001 - Does not abstain from drinking

Comr F10.20\* - Alcohol use disorder, Moderate - 7200002 - Alcoholism (disorder)

- c. You must document if the diagnosis is Primary, Additional, or Provisional. Click the drop-down menu in the **Type** field and select the appropriate option.
- d. If a severity level is appropriate, click the drop-down menu in the **Severity** field and select the appropriate option, mild, moderate, or severe.
- e. Click on the **Insert** button to populate the diagnosis into the Diagnosis List.

Diagnosis Document

Effective 01/09/2024 Status New Author Crowder, Traci

**Diagnosis**

No Diagnosis

**Diagnosis**

★ F10.20 (Alcohol use disorder, Moderate)

Code F10.20 Description Alcohol use disorder, Moderate

Rule Out

Type Primary

Severity Moderate

Specifier

Source

Remission

Order 2 Billable Yes No

Comments

Common Psych, Medical, and SDOH Diagnoses

**Diagnosis List** Insert Clear

|   | Order | DSM 5/ ICD 10 | SNOMED    | R/O | ICD/ DSM Descriptor   | SNOMED Description    | Type    | Severity | Source | Comments |
|---|-------|---------------|-----------|-----|-----------------------|-----------------------|---------|----------|--------|----------|
| X | 1     | F10.20        | 713583... |     | Alcohol use disord... | Mild alcohol depen... | Primary | Moderate |        |          |

- f. Click on the **Sign** button at the top right to sign and generate the document.

## F. Discharge

1. Before discharging someone from a bed, you must complete the CalOMS Discharge before the person is removed from the bed.
2. With the client's chart open, type CalOMS into the magnifying glass form search box and select **CalOMS Standalone Discharge/Update (Client)**. Complete the form and click Sign at the top right.

CalOMS Standalone Update/Discharge

Effective 02/14/2024 Status New Author Crowder, Traci

**CalOMS Information** SUD, Medical & Mental Health

**CalOMS Information**

Client ID 400000373

FSN  Transaction Type

Admission Date  Discharge Status

What is the client's gender?  Date of Birth 01/01/1900

What is the client's current first name?  What is the client's current last name?

What is the client's social security number? 999999999 Zip Code at Current Residence   
Allowed values: 5 digit zip, 00000, XXXXX, ZZZZZ

What is the client's birth first name?  What is the client's birth last name?

What is the client's state of birth if born within the United States?  What is the client's county of birth if born in California?

For which state does the client have a valid driver's license or state ID card?  What is the client's driver's license number or state ID card number?   
Allowed values: 13 digit ID, 99900, 99902, 99904

What is the first name of the client's mother, or individual the client considers to be their mother?

What type of disability/disabilities does the client have, if any?  
 None  
 Visual  
 Hearing  
 Speech  
 Mobility

Is there a consent form allowing future possible contact, signed by the client, on file within your agency?

3. When ready to discharge an individual from a bed, click on the **Occupied** dropdown and choose **Discharge**.



4. Enter/verify the **Discharge Date** and click **Save & Close** icon at the top right.

Census Management - Discharge 

**Activity**

40000005; Test, Test DOB: 01/01/2000 Gender: Male Initial Admit Date/Time: 11/30/2023 11:38 AM

Action: Discharge Discharge Date: 01/03/2024 Time: 7:10 AM  Firm  Non-Billable  Hold Bed

- Open the **Client Programs (Client)** screen by using the magnifying glass form search box.
- For the program you are discharging, click on the **Discharged** link in the **Status** column.

Client Programs (2)

All Programs  All Statuses

| Program Name           | Status                     | Enrolled <input type="text"/> | Discharged |
|------------------------|----------------------------|-------------------------------|------------|
| WESTCARE RICHMON...    | <a href="#">Enrolled</a>   | 11/30/2023                    |            |
| UJIMA LA CASA 904 M... | <a href="#">Discharged</a> | 07/15/2023                    | 07/16/2023 |

- Click on the **Discharge Reason** dropdown, select reason for discharge and click **Save** at the top right. Do not use **Administrative Discharge** unless you have no ability to contact the individual.

Program Assignment Details

**Program Assignment** Additional Information

**General**

Program Name   Primary Current Status

**Client...**  **Discharge Reason**