When Clinicians Gateway attempts to transfer notes into SmartCare, the transfer may be blocked by SmartCare. The errored note will be returned to Clinicians Gateway for corrections. After the corrections are made, the note can be finalized again to start a subsequent transfer action.

The overall Errored Notes process is imaged below.

- 1. CG User finalizes the service
- 2. Finalized CG services are processed nightly for export to SmartCare
- 3. Services are added to a staging table and checked for errors
- 4. Services passing the validation checks are transferred to SmartCare.
- 5. Services with errors are tagged with their error message.
- 6. Services with errors are reverted to Draft Status in CG and returned to the Pending Services list in CG with an Error icon attached. Departed Staff notes are also sent to the assigned supervisor.
- 7. When viewing the note the error message is displayed.
- 8. Staff correct the source of the error and then.....
 - 1. Staff re-finalizes the note to begin the transfer process again



Processing the Errored Notes

6. Services, when not accepted by SmartCare, with errors are reverted to Draft Status in CG and returned to the Pending Services list in CG with an Error icon attached. If the author is a Departed Staff, their notes are <u>also</u> sent to the Departed Staff Services grid of the assigned supervisor.

2	ending	Servi	ces							12 Resu	ilt
)	Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	(
	6059951			A CONTRACTOR OF A CONTRACTOR O	CHARLES CHARLES IN	10/10/2023	Diagnosis	881 - SUD Tra	Needs Auth		
	819225			Sly, Fox	CENTER POINT	7/3/2023	WM Scree	197 - SUD CG	O Draft		
	820648	57742	10067802	TEST, ADAM	CLINICIAN GATE	7/10/2023	Progress N	Group Couns	O Draft	/	
	6000077			test covote	And the state of the second second	10/10/2023	Daily Svc	3.1 RES (H00	Draft		
	6059968		CONTRACTOR OF THE OWNER.	and the second se		2/1/2024	Daily Svc	3.1 RES (H00.	Error		
	6059969					2/2/2024	Daily Svc	3.3 RES (H00	Error		
	6059970					2/3/2024	Daily Svc	3.5 RES (H00	Error		
	6059971					2/3/2024	Daily Svc	3.5 RES (H00)	Error		
	6058794			and the second	CONTRACTOR AND AND ADDRESS	2/15/2024	Progress N	OS (H0049) S	ODraft		
	6059994				send the out of the later.	3/1/2024	Indirect	OS (673) Scre	Error		
	6059952		10087955	TEST, GANDALF	ALC: Y CONSIGNATION OF	4/4/2024	Walk-Ins o		O Review	Peterso	
	6059955		111111111111111		CONTRACTOR OF STREET,	4/12/2024	Progress N	797 - CalWork	O Draft		

Departed	Staff Serv	ices	\leftarrow						15 Re:	sults
Svc #	Gsr#	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
819225			Sly, Fox	CENTER POINT KEA	7/3/2023	WM Screening	197 - SUD CG Inf	O Draft		0
820648	57742	10067802	TEST, ADAM	CLINICIAN GATEWA	7/10/2023	Progress Not	Group Counseling	O Draft	1	0
6000077			test, coyote	MAGNOLIA WMNS R	10/10/2023	Daily Svc Cal	3.1 RES (H0019)	O Draft		0
6059951		10099599			10/10/2023	Diagnosis	881 - SUD Tracki	Needs Auth		
6059971		10101151			2/3/2024	Daily Svc Cal	3.5 RES (H0019)	🖲 Error 💦 🗡	-	
6059970		10101151	and the second se	and the second se	2/5/2024	Daily Svc Cal	3.5 RES (H0019)	Error		

To see the error message and work on the note, click on the Service # or the blue button.

. N	otes Client	Shortcuts				\sim					
,	Pendin	g Serv	ices							12 Resul	lts
	Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	7
(605995	1		Training Training	AND THE OWNER OF TAXABLE PARTY.	10/10/2023	Diagnosis	881 - SUD Tra	Needs Auth		
	819225			Sly, Fox	CENTER POINT	7/3/2023	WM Scree	197 - SUD CG	ODraft		0
	820648	57742	10067802	TEST, ADAM	CLINICIAN GATE	7/10/2023	Progress N	Group Couns	O Draft		0
	600007	1		test covote	MAGNOLIA WMN	10/10/2023	Daily Svc	3.1 RES (H00	O Draft		0
	605996				CARLING CONTRACTOR	2/1/2024	Daily Svc	3.1 RES (H00	Error	-	
	605996	Э	10000000000000	Read Providence	CARRONNEL OF STREET	2/2/2024	Daily Svc	3.3 RES (H00	Error		U

7. When viewing the note the error message is displayed.

The errors are displayed at the top of the note on the View Draft Service Screen. In this example, the client is not enrolled in the program on the note, on the date of the service on the note. In this example, you would research whether the program is wrong, the date is wrong or the enrollment is wrong. (CG or SmartCare errors possible)

Clinicians Gateway View Draft S	ervice Clients ~
Welcome: Camille Peterson	Home Menu 👻 Log out
The following errors were reported by SmartCare:	
Date Description	
5/8/2024 Program setup issue. Client is not enrolled in the Program. Date of service sho equal to Discharged Date.	Id be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be less or
Individual Service (6059968), Primary Clinician: Peterson, Camille, Admin/Clerical (62823) Type: Service Note Daily RES CalAIM 23-04	

8. Staff is responsible for correcting the source of the error. (On the note it would be the Primary Clinician or the assigned Supervisor of a Departed Staff. Outside of the note, it would be support staff working in SmartCare.)

To work on the note, click the Edit Service button at the bottom of the page.

Cancol	Default Summary	Custom Summany Print	Spell Check	Delete Service
Cancel		Edit Service	Archive Ap	prove Addendum

For this example, check the Provider (program), the Client Opened date (enrollment) and the service date for errors. The correction might be made **in CG on the note itself or in SmartCare** to the client's program or enrollment dates, depending on the source of the error. You may need to correct data in SmartCare before re-finalizing.

The following errors were reported by SmartCare: Date Description 5/8/2024 Program setup issue. Client is not enrolled in the Program. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service service service to Date of Service date is (02/01/2024) III. review date Procedures: 3.1 RES (H0019) Residential Day III. review date Service Location: Residential Substance Abuse Facility III. review date Mode of Delivery: Face-to-face IIII. review date Principal Diagnosis:	The following errors were reported by SmartCare: Date Description 5/8/2024 Program setup issue. Client is not enrolled in the Program. Date of service should be greater than or should be less or equal to Discharged Date. Service #: 6059968 Title: Service Note Daily RES CaIAIM 23-04	equal to Program RequestedDate/EnrolledDate. Date of service
Date Description 5%2024 Program setup issue. Client is not enrolled in the Program. Date of service should be greater than or equal to Program RequestedDateEnrolledDate. Date of service Service #: 6059968 Title: Service Note Daily RES CaIAIM 23-04 Potential Harm: (Select One) Service #: 6059968 Title: Service Note Daily RES CaIAIM 23-04 Potential Harm: (Select One) Number Last Name First Name Client: Service date: 02/01/2024 Procedures: 3.1 RES (H0019) Residential Day Check the Provider, the service date and the Client Opened date Service Location: Residential Substance Abuse Facility Check the Provider, the service date and the Client Opened date Mode of Delivery: Face-to-face Med. Compliant: Yes Emergency? Pregnant/Post-Partum? The service date and the Client Opened date Billing time Primary Clinician 62823 - Peterson, Camille Primary Clinician 62823 - Peterson, Camille	Date Description 5/8/2024 Program setup issue. Client is not enrolled in the Program. Date of service should be greater than or should be less or equal to Discharged Date. Service #: 6059968 Title: Service Note Daily RES CaIAIM 23-04	equal to Program RequestedDate/EnrolledDate. Date of service Potential Harm: (Select One)
5/8/2024 Program seque issue. Client is not enrolled in the Program. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be less or equal to Discharged Date. Service #: 6059968 Title: Service Note Daily RES CalAIM 23-04 Potential Harm: [Select One] Mumber Last Name First Name Service date: [02/01/2024] Client: Number Last Name First Name Client: Service date: [02/01/2024] Procedures: 3.1 RES (H0019) Residential Day Check the Provider, the service date and the Client Opened date Mode of Delivery: Face-to-face Med. Compliant: Yes Med. Compliant: Yes Side Effects: [No Serviced ate and the Client Opened date Billing time Primary Clinician [62823 - Peterson, Camille Primary Clinician [62823 - Peterson, Camille Service	5/8/2024 Program setup issue. Client is not enrolled in the Program. Date of service should be greater than or should be less or equal to Discharged Date. Service #: 6059968 Title: Service Note Daily RES CalAIM 23-04	equal to Program RequestedDate/EnrolledDate. Date of service Potential Harm: (Select One)
Service #: 6059968 Title: Service Note Daily RES CaIAIM 23-04 Potential Harm: [Select One) Number Last Name First Name Client: Image: Client Opened: 4/4/2023 Procedures: 3.1 RES (H0019) Residential Day Image: Client Opened: 4/4/2023 Procedures: 3.1 RES (H0019) Residential Day Image: Client Opened: 4/4/2023 Will. review date: Plan due date: Mode of Delivery: Face-to-face Image: Client Opened date Mode. Compliant: Yes Side Effects: No Principal Diagnosis: F10.20 Alcohol dependence, uncomplicated Image: Client Opened Billing time Primary Clinician 62823 - Peterson, Camille Image: Client Opened Image: Client Opened	Service #: 6059968 Title: Service Note Daily RES CalAIM 23-04	Potential Harm: (Select One)
Number Last Name First Name Client: Client Service date: Procedures: 3.1 RES (H0019) Residential Day Procedures: 3.1 RES (H0019) Residential Day Plan due date: Plan due date: Check the Provider, the service date and the Client Opened date Mode of Delivery: Face-to-face Med. Compliant: Yes Side Effects: No Principal Diagnosis: F10.20 Alcohol dependence, uncomplicated Primary Clinician 62823 - Peterson, Camille		()
Number Last Name First Name Client opened: 4/4/2023 Util. review date Procedures: 3.1 RES (H0019) Residential Day Procedures: 3.1 RES (H0019) Residential Day Procedures: 3.1 RES (H0019) Residential Day Plan due date: Plan due date: Check the Provider, the service date and the Client Opened date Med. Compliant: Yes side Effects: No Emergency? Pregnant/Post-Partum? Principal Diagnosis: F10.20 * Alcohol dependence, uncomplicated Primary Clinician 62823 - Peterson, Camille		Service date: 02/01/2024
Client: Procedures: 3.1 RES (H0019) Residential Day Service Location: Residential Substance Abuse Facility Mode of Delivery: Face-to-face Med. Compliant: Ves Side Effects: No Emergency? Pregnant/Post-Partum? Principal Diagnosis: F10.20 * Alcohol dependence, uncomplicated Billing time Primary Clinician 62823 - Peterson, Camille	Number Last Name First Name	Client opened: 4/4/2023
Procedures: 3.1 RES (H0019) Residential Day Service Location: Residential Substance Abuse Facility Mode of Delivery: Face-to-face Med. Compliant: Yes Side Effects: No Emergency? Pregnant/Post-Partum? Principal Diagnosis: F10.20 * Alcohol dependence, uncomplicated Billing time Primary Clinician 62823 - Peterson, Camille		Util. review date
Service Location: Residential Substance Abuse Facility Mode of Delivery: Face-to-face Med. Compliant: Yes Side Effects: No Emergency? Pregnant/Post-Partum? Principal Diagnosis: F10.20 Alcohol dependence, uncomplicated W Billing time Primary Clinician 62823 - Peterson, Camille	Procedures: 3.1 RES (H0019) Residential Day	Plan due date:
Med. Compliant: Yes Side Effects: No V Emergency? Pregnant/Post-Partum? Image: Complicated in the second s	Service Location: Residential Substance Abuse Facility Mode of Delivery: Face-to-face	
Emergency? Pregnant/Post-Partum? Principal Diagnosis: F10.20 * Alcohol dependence, uncomplicated * * Billing time Primary Clinician 62823 - Peterson, Camille *	Med. Compliant: Yes 🗸 Side Effects: No 🗸	
Principal Diagnosis: F10.20 x v Alcohol dependence, uncomplicated x v Billing time Primary Clinician 62823 - Peterson, Camille v	Emergency? Pregnant/Post-Partum?	
Billing time Primary Clinician 62823 - Peterson, Camille	Principal Diagnosis: F10.20 x x Alcohol dependence, uncomplicated x x	
Primary Clinician 62823 - Peterson, Camille 🗸	Billing time	
	Primary Clinician 62823 - Peterson, Camille 🗸	
Provider: MAGNOLIA WMNS REC RES ADLT OAK	Provider: MAGNOLIA WMNS REC RES ADLT OAK	

When corrections have been made, Finalize the note again via the Finalize button or Daily Approval (Staff Log).

Cancel	Spell Check	Save and Continue	Save as Pending	Save as Draft	Finalize
					\sim

The note is now moved from Pending Services to Finalized Services. The error message is removed from the note.

Clinicians Gateway		Vi	ew Finalized Servi	ce		C	lients	✓ Search
Welcome: Camille F	Peterson					Home	Menu 👻 🛛	Log out
Individual Service (6 Service Note Daily R	059968), Primary Clinician: Peterson, ES CalAIM 23-04	Camille, Admin/Cl	er (62823) Type:					
Client: Provider:								
Procedure: Service Location:	3.1 RES (H0019) Residential Day Residential Substance Abuse Facility Mo	ode of Delivery:	Face-to-face		Med Compliant	Vee	Service	2/1/2024

The finalized note is now ready to be processed again by the nightly export job.

Reasons and Resolutions

The reasons that the notes may be errored out and possible paths to resolution are presented in the table below.

Validation Error Messages	Possible Courses of Action
Duration cannot be negative.	Add time for primary procedure code duration
Duration cannot be zero.	Add time for primary procedure code duration
Duplicate Service Exists.	Check for duplicate service, verify date and procedure on note
ClientId is Inactive/Deleted/Merged	Check SmartCare current client ID #, update note
Brogram cature issue	Contact IS Support to research if program is assigned to the staff or to
Program setup issue.	escalate to BBS Data Integrity Unit
ProgramId is Inacting/Deleted	Check program on note for currently active program or contact IS Support
Programid is mactive/Deleted.	to escalate to BBS Data Inegrity Unit
Client is not enrolled in the Program.	Check enrollment dates and programs in SmartCare

	1 0
Clinician not authorized in the Program	Contact IS Support to research if program is assigned to the staff
Procedure Code not authorized in the Program	Contact IS Support to report to BBS Data Integrity Unit
Date of service should be greater than or equal to	Check enrollment dates and programs in SmartCare, update note or
Program Enrolled Date.	enrollments as needed
Date of service should be less or equal to Discharg	Check enrollment dates and programs in SmartCare, update note or
ed Date.	enrollments as needed
Procedure Code not allowed for this Program on	Contact IS Support to research and possibly escalate to BBS Data Integrity
this date.	Unit
Draga dura Cada catur isuna	Contact IS Support to research and possibly escalate to BBS Data Integrity
Procedure Code setup issue.	Unit
	Refer to the ACBHD QA list of allowed procedure codes and update note
ProcedureCodeId is Inactive/Deleted.	as needed. If needed, contact IS Support to research and possibly escalate
	to BBS Data Integrity Unit
	Contact IS Support to research and possibly escalate to BBS Data Integrity
Procedure Code not authorized in the Program	Unit
Procedure Code not allowed for this Program on	Contact IS Support to research and possibly escalate to BBS Data Integrity
this date.	Unit

	Refer to the ACBHD QA list of allowed procedure codes and update note
Procedure Code not allowed for this Staff	as needed. If needed, contact IS Support to research and possibly escalate
Licensure.	to BBS Data Integrity Unit
Duration should be in between Drees dure	Refer to the ACBHD QA list of allowed procedure codes and update note
Codes Min and May Vehas	as needed. If needed, contact IS Support to research and possibly escalate
Codes Milli and Max Values.	to BBS Data Integrity Unit

Diagnosis Code is Missing	Add Diagnosis Code to service note

Validation Error Messages

Possible Courses of Action

	Contact IS Support to research and possibly escalate to RRS Data Integrity
Location not allowed for this Procedure.	Unit
I a antion I d in Investion (Date d	Contact IS Support to research and possibly escalate to BBS Data Integrity
Locationid is inactive/Deleted.	Unit
Please notify IS Helpdesk to correct mapping for	Contact IS Support to research and possibly escalate to BBS Data Integrity
Place of Service for this Location.	Unit
	Contact IS Support to research and possibly escalate to BBS Data Integrity
Location not allowed for this Program.	Unit
	Contact IS Support to research and possibly escalate to BBS Data Integrity
Clinician is Inactive/Deleted.	Unit
	Contact IS Support to research and possibly escalate to BBS Data Integrity
Contact IS Helpdesk to research Clinican setup	Unit
ICD10Code is missing.	Add ICD-10 Dx code to note
	Contact IS Support to research and possibly escalate to System Applications
DSMV Code is not setup for this ICD-10 Code.	Umit
DSMV Code is not available with Billable Flag	
setup for this ICD-10 Code. Please contact the IS	Contact IS Support to research and possibly escalate to System Applications
Helpdesk.	
ICD 10 Co 1 is not allow 16 of the Elevel Mars of	Refer to the ACBHD QA list of allowed diagnosis codes and update note as
ICD-10 Code is not allowed for the Fiscal Year of	DBC Data Integrate Unit
Service.	BBS Data Integrity Unit
Investid ICD10Co do DSMUCo do Id	Refer to the ACBHD QA list of allowed diagnosis codes and update note as
Invalid ICD10Code/DSIVIVCodeId.	DRS Data Integrity Unit
	BBS Data integrity Onic Refer to the ACRHD OA list of allowed diagnosis codes and undate note as
Invalid DSMVC odeld	needed. If needed, contact IS Support to research and possibly escalate to
Invalid DSIVI V Coderd.	BBS Data Integrity Unit
ICD10Code2 is missing.	Add second diagnosis code for test results to Recovery Incentives note
DSMV Code is not setup for the additional ICD-	Recovery Incentives 2nd Dx code message. Contact IS Support to research
10 Code.	and possibly escalate to System Applications Unit
DSMV Code is not available with Billable Flag	
setup for the additional ICD-10 Code. Please	Recovery Incentives 2nd Dx code message. Contact IS Support to research
contact IS Helpdesk	and possibly escalate to System Applications Unit
	Recovery Incentives 2nd Dx code message. Refer to the ACBHD QA list of
Additional ICD-10 Code is not allowed for the	allowed diagnosis codes and update note as needed. If needed, contact IS
Fiscal Year of Service.	Support to research and possibly escalate to BBS Data Integrity Unit
	Recovery Incentives 2nd Dx code message. Refer to the ACBHD QA list of
Invalid ICD10Code2/DSMVCodeId2.	allowed diagnosis codes and update note as needed. If needed, contact IS
	Support to research and possibly escalate to BBS Data Integrity Unit
	Recovery Incentives 2nd Dx code message. Refer to the ACBHD QA list of
Invalid DSMVCodeId2.	allowed diagnosis codes and update note as needed. If needed, contact IS
	Support to research and possibly escalate to BBS Data Integrity Unit
	Recovery Incentives Dx code message. Add primary Dx code to note. If
Additional ICD-10 Code exists, but primary ICD-	needed, contact IS Support to research and possibly escalate to System

Validation Error Messages

Possible Courses of Action

H.

Add-On Procedure Code 1 is not allowed with the Primary Procedure Code.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
AddOnProcedureCodeStartTime1 is missing.	This is defaulted as the same time as the primary. Should not happen
Add-On Procedure Code duration or unit is	
missing.	Add duration to Add-on code
AddOnProcedureCodeUnitType1 is missing.	This should not happen. CG defaults the unit type
Add On Procedure Code	Refer to the ACBHD QA list of allowed procedure codes and update note as
2 is not allowed with the Drimory Dress three Code	needed. If needed, contact IS Support to research and possibly escalate to
2 is not allowed with the Primary Procedure Code.	BBS Data Integrity Unit
AddOnProcedureCodeStartTime2 is missing.	This is defaulted as the same time as the primary. Should not happen
Add-On Procedure Code duration or unit is	
missing.	Add duration to Add-on code
AddOnProcedureCodeUnitType2 is missing.	This should not happen. CG defaults the unit type
Add On Procedure Code	Refer to the ACBHD QA list of allowed procedure codes and update note as
2 is not allowed with the Drivery Dress days Code	needed. If needed, contact IS Support to research and possibly escalate to
3 is not allowed with the Primary Procedure Code.	BBS Data Integrity Unit
AddOnProcedureCodeStartTime3 is missing.	This is defaulted as the same time as the primary. Should not happen
Add-On Procedure Code duration or unit is	
missing.	Add duration to Add-on code
AddOnProcedureCodeUnitType3 is missing.	This should not happen. CG defaults the unit type