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.

Pending	j Serv i	ices							12 Resu	ilts
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	9
6059951			distant sector sector sector sector	Charles and the second second second	10/10/2023	Diagnosis	881 - SUD Tra	Needs Auth		
819225			Sly, Fox	CENTER POINT	7/3/2023	WM Scree	197 - SUD CG	O Draft		C
820648	57742	10067802	TEST, ADAM	CLINICIAN GATE	7/10/2023	Progress N	Group Couns	O Draft	/	C
6000077			test covote	ARE DRIVEN AT MALER.	10/10/2023	Daily Svc	3.1 RES (H00	Draft		C
6059968			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				CONTRACTOR AND ADDRESS	2/15/2024	Progress N	OS (H0049) S	ODraft		C
6059994				state of the second	3/1/2024	Indirect	OS (673) Scre	Error		- 🕩
6059952		10087955	TEST, GANDALF	ALC: NO. BELLEVILLE	4/4/2024	Walk-Ins o		Review	Peterso	C
6059955				CONTRACTOR OF TAXABLE PROPERTY.	4/12/2024	Progress N	797 - CalWork	O Draft		0

De	eparted	Staff Se	rvices <							15 Re	sult
J	Svc #	Gsr#	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	5
	819225			Sly, Fox	CENTER POINT KEA	7/3/2023	WM Screening	197 - SUD CG Inf	O Draft		C
	820648	57742	10067802	TEST, ADAM	CLINICIAN GATEWA	7/10/2023	Progress Not	Group Counseling	O Draft	1	
	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	\vee	
	6059971		10101151			2/3/2024	Daily Svc Cal	3.5 RES (H0019)	🔴 Error 💦 🗡	~	
	6059970		10101151			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			test covote	MAGNOLIA WMN	10/10/2023	Daily Svc	3.1 RES (H00	O Draft		0
	605996	3			determinent der werten.	2/1/2024	Daily Svc	3.1 RES (H00	Error		
	605996	Э	10000000000000	Read Annalised	CARRONNEL OF STREET	2/2/2024	Daily Svc	3.3 RES (H00	Error		}

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)

	View Draft Service	Clients	✓ Search				
Welcome: Camille Peterson	Home	Menu 👻	Log out				
The following errors were repo	orted by SmartCare:						
Date De	escription						
	ogram setup issue. Client is not enrolled in the Program. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Dal ual to Discharged Date.	te of service shou	uld be less or				
Individual Service (6059968), F (62823) Type: Service Note Da	Primary Clinician: Peterson, Camille, Admin/Clerical ily 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 Summary 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.

Number Last Name First Name Service date: 02/01/2024 Image: Client opened: 4/4/2023 Vill. review date: Procedures: 3.1 RES (H0019) Residential Day Plan due date: Plan due date: Service Location: Residential Substance Abuse Facility Plan due date: Plan due date: Mode of Delivery: Face-to-face Progenative Structure Progenative Structure Med. Compliant: Yes Side Effects: No Principal Diagnosis: F10.20 Alcohol dependence, uncomplicated Image: The service date and the Client Opened date Billing time Service date Service Service date and the Client Opened date	Date Description Frogram setup issue. Client is not enrolled in the Program. Date of service should be greater than	a sa amal ka Duanana Damuska (Data (Casalla (Data Data of a misa
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 Service #: 6059968 Title: Service Note Daily RES CaIAIM 23-04 Potential Harm: (Select One) Service #: 6059968 Service date: 02/01/2024 Service date: 02/01/2024 Number Last Name First Name Client opened: 4/4/2023 Util. review date: 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 Med. Compliant: Yes Side Effects: No Principal Diagnosis: F10.20 Alcohol dependence, uncomplicated Xes Billing time Service Xes Xes	Program setup issue. Client is not enrolled in the Program. Date of service should be greater than	
Solution Service Service Note Daily RES CalAIM 23-04 Potential Harm: (Select One) Service #: 6059968 Title: Service Note Daily RES CalAIM 23-04 Potential Harm: (Select One) Number Last Name First Name Service date: (02/01/2024) IIII Client: Image: Client: Service date: (02/01/2024) IIIII Procedures: 3.1 RES (H0019) Residential Day Image: Check the Provider, the service date and the Client Opened date Plan due date: Service Location: Residential Substance Abuse Facility Image: Check the Provider, the Service date and the Client Opened date Plan due date: Mode of Delivery: Face-to-face Image: Check the Client Opened date Image: Check the Client Opened date Principal Diagnosis: F10.20 Image: Alcohol dependence, uncomplicated Image: Check the Provider, the Client Opened date Billing time Service Alcohol dependence, uncomplicated Image: Check the Provider, the Client Opened date Image: Check the Provider, the Client Opened date		a second to Descent Descented Date (Casellad Date, Date of service)
Number Last Name Client: Procedures: 3.1 RES (H0019) Residential Day Procedures: 6.1 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		n or equal to Program RequestedDate/EnroleoDate. Date of service
Number Last Name First Name Client: Client opened: 4/4/2023 Util. review date: Procedures: 3.1 RES (H0019) Residential Day Procedures: 3.1 RES (H0019) Residential Day Plan due date: Check the Provider, the service date and the Client Opened date Mode of Delivery: Face-to-face Mode of Delivery: Face-to-face Med. Compliant: Yes Side Effects: No Emergency? Prencipal Diagnosis: F10.20 Alcohol dependence, uncomplicated **	Service #: 6059968 Title: Service Note Daily RES CalAIM 23-04	Potential Harm: (Select One)
Client: Procedures: 3.1 RES (H0019) Residential Day Procedures: 3.1 RES (H0019) Residential Day Plan due date: 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		Service date: 02/01/2024
Procedures: 3.1 RES (H0019) Residential Day Plan due date: Check the Provider, the service date and the Client Opened date Mode of Delivery: Face-to-face Fince Side Effects: No Emergency? Pregnant/Post-Partum? Principal Diagnosis: F10.20 Alcohol dependence, uncomplicated Billing time		Client opened: 4/4/2023
Procedures: Service Location: Residential Substance Abuse Facility Mode of Delivery: Face-to-face Med. Compliant: Yes Side Effects: No Emergency? Principal Diagnosis: F10.20 X	Client:	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 * Billing time	Procedures: 3.1 RES (H0019) Residential Day	Plan due date:
Emergency? Pregnant/Post-Partum?	Service Location: Residential Substance Abuse Facility the service date at the Client Opened of the Client Opene	nd
Principal Diagnosis: F10.20 x CAlcohol dependence, uncomplicated x C	Med. Compliant: Yes 🗸 Side Effects: No 🗸	
Billing time	Emergency? Pregnant/Post-Partum?	
	Principal Diagnosis: F10.20 * Alcohol dependence, uncomplicated *	-
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						\frown
	Cancel	Spell Check	Save and Continue	Save as Pending	Save as Draft	Finalize

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

Clinicians Gateway		Vi	ew Finalized Servio	xe			ients	✓ 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/Cle	r (62823) Type:					
Client: Provider:								
Procedure: Service Location:	3.1 RES (H0019) Residential Day Residential Substance Abuse Facility M	ode of Delivery:	Face-to-face		Mod Compliant	Vac	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
Program setup issue.	Contact IS Support to research if program is assigned to the staff or to
	escalate to BBS Data Integrity Unit
ProgramId is Inactive/Deleted.	Check program on note for currently active program or contact IS Support
Programite is macuve/Deleted.	to escalate to BBS Data Inegrity Unit
Client is not enrolled in the Program.	Check enrollment dates and programs in SmartCare

10
Contact IS Support to research if program is assigned to the staff
Contact IS Support to report to BBS Data Integrity Unit
Check enrollment dates and programs in SmartCare, update note or
enrollments as needed
Check enrollment dates and programs in SmartCare, update note or
enrollments as 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
Unit
Refer to the ACBHD QA list of allowed procedure codes and update note
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
Unit
Contact IS Support to research and possibly escalate to BBS Data Integrity
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 Procedure	Refer to the ACBHD QA list of allowed procedure codes and update note
Codes Min and Max Values.	as needed. If needed, contact IS Support to research and possibly escalate
Codes Min 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

L	
Location not allowed for this Procedure.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
LocationId is Inactive/Deleted.	Contact IS Support to research and possibly escalate to BBS Data Integrity 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.	Unit
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.	Unit
	Refer to the ACBHD QA list of allowed diagnosis codes and update note as
	needed. If needed, contact IS Support to research and possibly escalate to
Service.	BBS Data Integrity Unit
Invalid ICD10Code/DSMVCodeId. Invalid DSMVCodeId.	Refer to the ACBHD QA list of allowed diagnosis codes and update note as
	needed. If needed, contact IS Support to research and possibly escalate to
	BBS Data Integrity Unit
	Refer to the ACBHD QA list of allowed diagnosis codes and update note as
	needed. If needed, contact IS Support to research and possibly escalate to 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
Invalid ICD10Code2/DSMVCodeId2.	Recovery Incentives 2nd Dx code message. Refer to the ACBHD QA list of
	allowed diagnosis codes and update note as needed. If needed, contact IS
	Support to research and possibly escalate to BBS Data Integrity Unit
Invalid DSMVCodeId2.	Recovery Incentives 2nd Dx code message. Refer to the ACBHD QA list of
	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
10 is missing.	Applications Unit

Validation Error Messages

Possible Courses of Action

Ŧ.

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 2 is not allowed with the Primary Procedure Code.	Refer to the ACBHD QA list of allowed procedure codes and update note as needed. If needed, contact IS Support to research and possibly escalate to 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 3 is not allowed with the Primary Procedure Code.	Refer to the ACBHD QA list of allowed procedure codes and update note as needed. If needed, contact IS Support to research and possibly escalate to 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