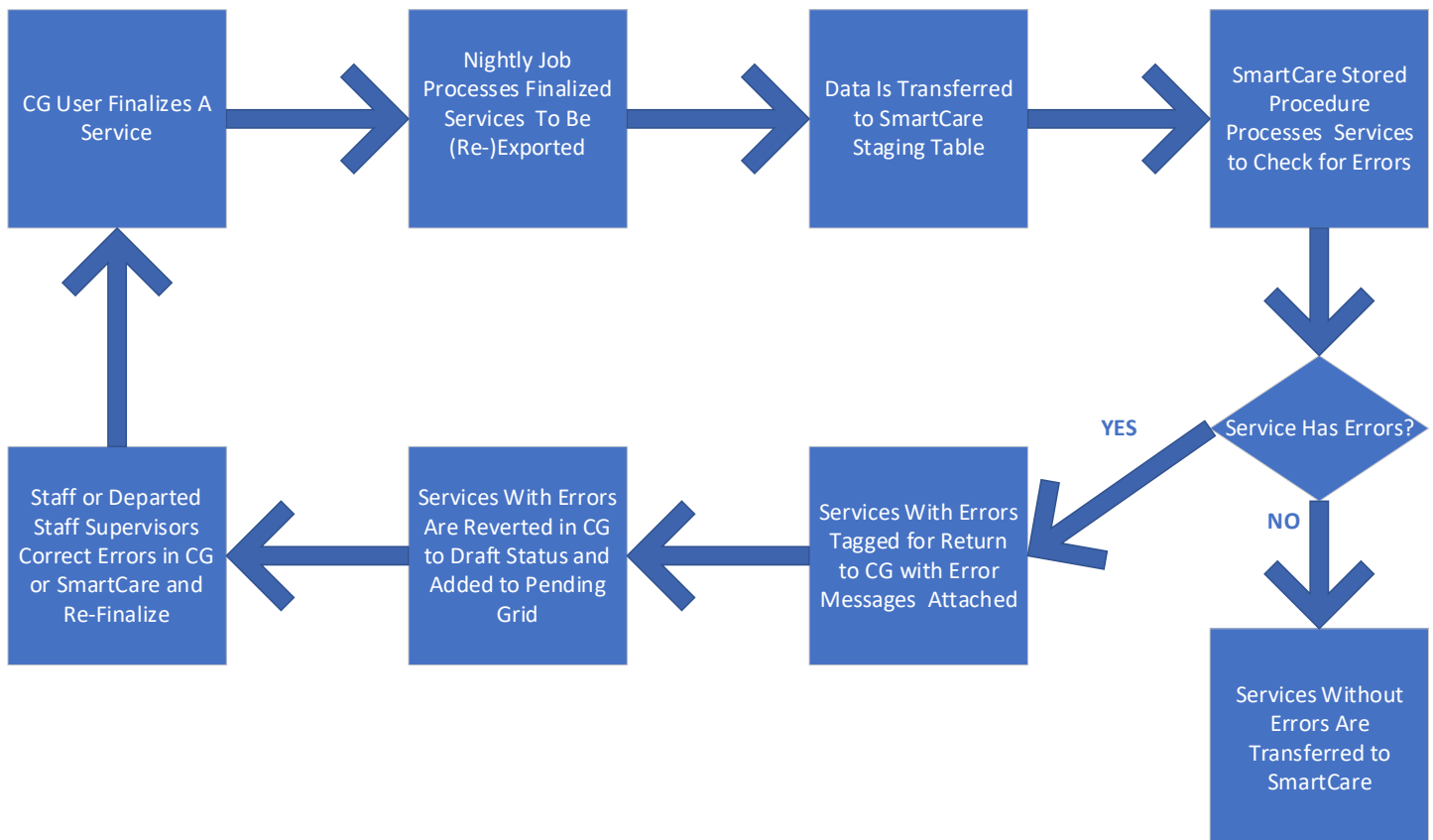


When Clinicians Gateway attempts to transfer notes into SmartCare, the transfer may be blocked by SmartCare. The errored note will be returned to Clinicians Gateway for corrections. After the corrections are made, the note can be finalized again to start a subsequent transfer action.

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

- 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 also sent to the Departed Staff Services grid of the assigned supervisor.

Notes Client Shortcuts

Pending Services										12 Results
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
6059951					10/10/2023	Diagnosis	881 - SUD Tra...	Needs Auth...		
819225			Sly, Fox	CENTER POINT ...	7/3/2023	WM Scree...	197 - SUD CG...	Draft		
820648	57742	10067802	TEST, ADAM	CLINICIAN GATE...	7/10/2023	Progress N...	Group Couns...	Draft		
6000077			test, covote		10/10/2023	Daily Svc ...	3.1 RES (H00...	Draft		
6059968					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					2/15/2024	Progress N...	OS (H0049) S...	Draft		
6059994					3/1/2024	Indirect	OS (673) Scree...	Error		
6059952		10087955	TEST, GANDALF		4/4/2024	Walk-Ins o...		Review	Peterso...	
6059955					4/12/2024	Progress N...	797 - CalWork...	Draft		

View: 50 << First < Prev 1 Next > Last >>

Notes Client Shortcuts

Departed Staff Services										15 Results
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...	Draft		
820648	57742	10067802	TEST, ADAM	CLINICIAN GATEWA...	7/10/2023	Progress Not...	Group Counseling	Draft		
6000077			test, covote	MAGNOLIA WMNS R...	10/10/2023	Daily Svc Cal...	3.1 RES (H0019) ...	Draft		
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			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.

Notes Client Shortcuts

Pending Services										12 Results
Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer	
6059951					10/10/2023	Diagnosis	881 - SUD Tra...	Needs Auth...		
819225			Sly, Fox	CENTER POINT ...	7/3/2023	WM Scree...	197 - SUD CG...	Draft		
820648	57742	10067802	TEST, ADAM	CLINICIAN GATE...	7/10/2023	Progress N...	Group Couns...	Draft		
6000077			test, covote	MAGNOLIA WMN...	10/10/2023	Daily Svc ...	3.1 RES (H00...	Draft		
6059968					2/1/2024	Daily Svc ...	3.1 RES (H00...	Error		
6059969					2/2/2024	Daily Svc ...	3.3 RES (H00...	Error		

- 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 SUD View Draft Service Clients [dropdown] Search

Welcome: Camille Peterson Home Menu Log out

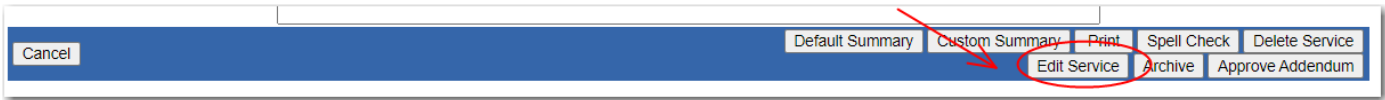
The following errors were reported by SmartCare:

Date	Description
5/8/2024	Program setup issue. Client is not enrolled in the Program. Date of service should be greater than or equal to Program RequestedDate/EnrolledDate. Date of service should be less or equal to Discharged Date.

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.



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 less or equal to Discharged Date.

Service #: 6059968 Title: Service Note Daily RES CalAIM 23-04 Potential Harm: (Select One)

Client: [Number] [Last Name] [First Name] [X] [...]

Service date: 02/01/2024
 Client opened: 4/4/2023
 Util. review date:
 Plan due date:

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

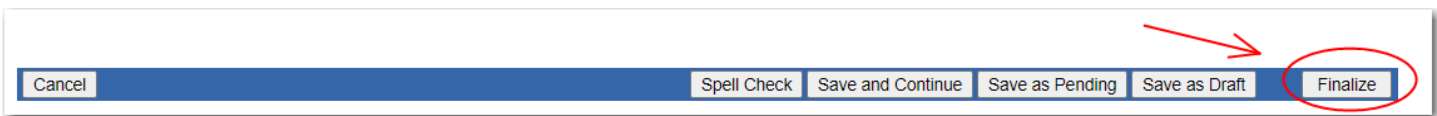
Billing time

Primary Clinician: 62823 - Peterson, Camille

Provider: MAGNOLIA WMNS REC RES ADLT OAK

Check the Provider, the service date and the Client Opened date

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



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

Clinicians Gateway SUD View Finalized Service Clients [Dropdown] Search

Welcome: Camille Peterson Home Menu Log out

Individual Service (6059968), Primary Clinician: Peterson, Camille, Admin/Cler (62823) Type: Service Note Daily RES CalAIM 23-04

Client: [Redacted]
 Provider: [Redacted]
 Procedure: 3.1 RES (H0019) Residential Day Service 2/1/2024
 Service Location: Residential Substance Abuse Facility Mode of Delivery: Face-to-face Med. Compliant: Yes Side Effects: No

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 to escalate to BBS Data Integrity Unit
Client is not enrolled in the Program.	Check enrollment dates and programs in SmartCare

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 Program Enrolled Date.	Check enrollment dates and programs in SmartCare, update note or enrollments as needed
Date of service should be less or equal to Discharged Date.	Check enrollment dates and programs in SmartCare, update note or enrollments as needed
Procedure Code not allowed for this Program on this date.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
Procedure Code setup issue.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
ProcedureCodeId is Inactive/Deleted.	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
Procedure Code not authorized in the Program	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
Procedure Code not allowed for this Program on this date.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit

Procedure Code not allowed for this Staff Licensure.	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
Duration should be in between Procedure Codes Min and Max Values.	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

Diagnosis Code is Missing	Add Diagnosis Code to service note
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Validation Error Messages	Possible Courses of Action
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 Place of Service for this Location.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
Location not allowed for this Program.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
Clinician is Inactive/Deleted.	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
Contact IS Helpdesk to research Clinician setup	Contact IS Support to research and possibly escalate to BBS Data Integrity Unit
ICD10Code is missing.	Add ICD-10 Dx code to note
DSMV Code is not setup for this ICD-10 Code.	Contact IS Support to research and possibly escalate to System Applications Unit
DSMV Code is not available with Billable Flag setup for this ICD-10 Code. Please contact the IS Helpdesk.	Contact IS Support to research and possibly escalate to System Applications Unit
ICD-10 Code is not allowed for the Fiscal Year of Service.	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 ICD10Code/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
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
ICD10Code2 is missing.	Add second diagnosis code for test results to Recovery Incentives note
DSMV Code is not setup for the additional ICD-10 Code.	Recovery Incentives 2nd Dx code message. Contact IS Support to research and possibly escalate to System Applications Unit
DSMV Code is not available with Billable Flag setup for the additional ICD-10 Code. Please contact IS Helpdesk	Recovery Incentives 2nd Dx code message. Contact IS Support to research and possibly escalate to System Applications Unit
Additional ICD-10 Code is not allowed for the Fiscal Year of Service.	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 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
Additional ICD-10 Code exists, but primary ICD-10 is missing.	Recovery Incentives Dx code message. Add primary Dx code to note. If needed, contact IS Support to research and possibly escalate to System Applications Unit

Validation Error Messages	Possible Courses of Action
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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