

**DIRECT SERVICE NOTES**

1. After notes are migrated from CG-InSyst (CG-I) to CG-SmartCare (CG-S), they will be in the Pending Services List on the Home page of the author. Notes migrated from CG-I will have a blue dot and service numbers smaller than those from CG-S (e.g. 800,000 versus 6,000,000). All migrated notes will have the status of **Draft** to indicate that work is needed to adapt to the new CaAIM procedure codes and billing formats.
2. To Edit the note, click on the service # or the blue dot to move to the View Service Screen.

Svc #	Gsf #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
819225			Sly, Fox	CENTER POINT ...	7/3/2023	WM Scree...	SUD CG Infor...	○ Draft	
820646				CITY OF FREMO...	7/10/2023	Indirect	SUD TRACKI...	○ Draft	
820648	57742	10067802	TEST, ADAM	CLINICIAN GATE...	7/10/2023	Progress N...	Group Couns...	○ Draft	
890575			test, test1	HORIZON 3.2 CH...	7/13/2023	Screening	SUD ASAM In...	○ Draft	
6000077			test. covote	MAGNOLIA WMN...	10/10/2023	Daily Svc ...	3.1 RES (H00...	○ Draft	
893280				CENTER POINT ...	10/19/2023	Info Only	Call Received ...	○ Draft	
903381				HORIZON 3.2 CH...	12/15/2023	Info Only	3.2 WM CON...	○ Draft	
6034062	201484			OPTIONS RECO...	1/3/2024	Progress N...	OS (H2014) G...		
6034063	201484			OPTIONS RECO...	1/3/2024	Progress N...	OS (H2014) G...	○ Draft	
6034064	201484			OPTIONS RECO...	1/3/2024	Progress N...	OS (H2017) G...		
6039174				CENTER POINT ...	1/12/2024	Info Only	820 - Call Rec...	● Review	Peterso...

3. Note the procedure code, service location, duration and if there are any add-on codes on the migrated notes before proceeding to Edit. Then click **"Edit Service"** on the bottom right of the screen.

Clinicians Gateway

View Draft Service

Welcome: [Name]

Home Menu Log out

Individual Service (5701171), Primary Clinician: [Name] Type: Physician's Progress Note

Client: [Name]  
 Provider: EDEN MHS ADULT SERVICE TEAM 1  
 Procedure: 99214 E/M EST OP MOD COMPL 25M  
 Service Location: Office Mode of Delivery:  
 Emergency: No

Service 7/11/2023  
 Med. Compliant: N/A Side Effects: N/A

Role	Staff #	Staff Name	Preferred Name	NPI	Service	Time	Approved
Primary Clinician					Travel Documentation Clinician time	00:39	Edit

Additional E/M, Psychotherapy or Crisis Minutes: None 2nd FF/Contact/E-M Time:  
 Interactive Complexity: Not Present

Cancel Default Summary Custom Summary Print Spell Check Delete Service Edit Service Archive Approve Addendum

#### 4. Update the billing details

- A new code must be chosen on each note. The \* indicates that the displayed code came from InSyst. It needs to be re-chosen to get a SmartCare code ID in the CG-SmartCare database.
- Reference the CPT code guidance from ACBH QA and BBS units** for which codes are allowed for your staff type and for code combinations that cannot be used on the same day (lock-outs). CPT Code training and code charts can be found on the Providers Website in the Quality Assurance Training page. [ACBH Providers Website - Quality Assurance Training \(acbhcs.org\)](http://acbhcs.org) Some restrictions have not yet been applied in SmartCare so they are not available yet in CG.
- Verify the Service Location. SmartCare has different choices, so it may need to be changed.
- Add Mode of Delivery
- Verify or add the Principal Diagnosis
- A Service Start of midnight was defaulted. You may leave it or update it as you wish.
- The service Duration may need to be spread across the Duration, Travel and Documentation fields.
- Sometimes the new primary Procedure Code accepts less time than the old code. If the new primary code doesn't allow the amount in the service duration, you will get an error message when you try to Submit, Save as Pending, or Finalize.
- You may need an Add-On code. If so, spread the service Duration across the primary and add-on codes.

Service #: 5701171 Title: Physician's Progress Note
Potential Harm:

Client:

Procedures: \*99214 E/M EST OP MOD COMPL 25M

Service Location: Office (Primary)

Mode of Delivery: (Select One)

Med. Compliant: N/A Side Effects: N/A

Emergency?

Principal Diagnosis: F25.1 Schizoaffective disorder, depressive type

Service date: 07/11/2023

Client opened: 1/11/2017

Util. review date:

Client Plan due date: 12/31/2022  
C/P has expired

**Update the code. The \* indicates that this is the old InSyst code**

**Update the Location if needed since new types exist for CalAIM**

**Add Mode of Delivery**

**Verify or Add Principal Diagnosis**

**Billing time**

Primary Clinician:

Provider: EDEN MHS ADULT SERVICE TEAM 1 (0112T1)

**Optional to update the defaulted Service Start**

**Distribute the duration across the three time fields as appropriate. New primary codes may result in some duration shifting to an Add-on code**

Service Start: 12:00 AM

Duration: 00:39

Travel Time: 00:00

Documentation Time: 00:00

Clinician Time: 00:39

[Add Additional Clinicians](#)

**Care Team Members** **0 Result**

Name	Company	Phone	Role	Removal Date
No Records				

View: 10

Additional E/M, Psychotherapy or Crisis Minutes: None

Interactive Complexity: Not Present

2nd FF/Contact/E-M Time:

Add the Primary code duration + the Add-On code duration to calculate the Contact Time duration.

**Billing time**

Primary Clinician: 10904 - Peterson, Camille E  
 Provider: VALLEY ADULT MEDICATION ONLY (0132M1)

Service Start: 12:00 AM  
 Duration: 00:15  
 Travel Time: 00:00  
 Documentation Time: 00:00  
 Clinician Time: 00:15

**The new Primary procedure code might allow less time so you may need to split the time across the primary and an add-on code 15 min Primary + 14 min Add-on = 39 minutes**

Add-on Codes: G2212 Prolonged E/M (each add'l 15min)  
 Add-On Time: 00:14  
 Interactive Complexity: None

**Instructions and Pre-Existing Diagnoses**  
 Respond to problems/goals/objectives of treatment plan and signs and symptoms related to diagnosis. Include treatment interventions and address changes in the client's functioning. If there is little progress, include an explanation of the limited progress.

Primary FF/Contact/E-M Time: 00:39  
 Hours:Minutes

Services were provided in: English  
 by  interpreter or  clinician

ICD-10: Primary Secondary Tertiary SU GMC  
 DSM 5:

An \* asterisk indicates that the value is not valid. Update SmartCare or change the value to correct it.

Service #: 6000077 Title: Service Note Daily RES CaAIM 23-04  
 Potential Harm: Information likely to endanger

Service date: 10/10/2023  
 Util. review date:  
 Plan due date:

Client: Unknown test coyote

Procedures: 3.1 RES (H0019) Residential Day

Service Location: Residential Substance Abuse Facility  
 Mode of Delivery: Face-to-face  
 Med. Compliant: Uncertain Side Effects: Uncertain  
 Emergency?  Pregnant/Post-Partum?

Principal Diagnosis: F20.3 Undifferentiated schizophrenia

**An \* asterisk indicates that the value is not valid. For example, this client is not enrolled in the program. Enroll the client in SC or change the program**

**Billing time**

Primary Clinician: 62823 - Peterson, Camille  
 Provider: \*MAGNOLIA WMNS RES ADLT HAY

Service Start: 05:55 AM  
 Duration: 24:00  
 Travel Time: 00:00  
 Documentation Time: 00:00  
 Clinician Time: 24:00

- Move to Finalization:** After making changes to the billing header, process as your program normally does. Either Submit for Review, Save as Pending, or Finalize.

After making changes move to Submit for Approval, Save as Pending, or Finalize as you usually do depending on your program

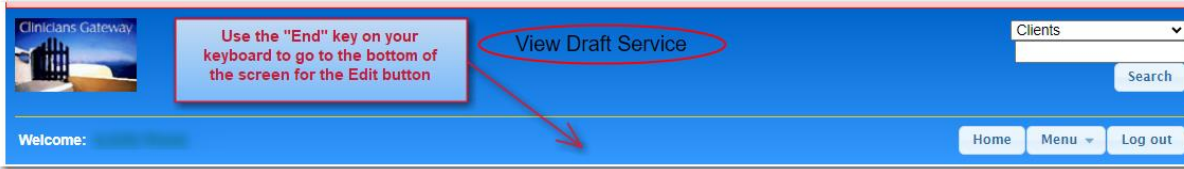
Note is complete.

Submit Save as Pending Save as Draft Finalize

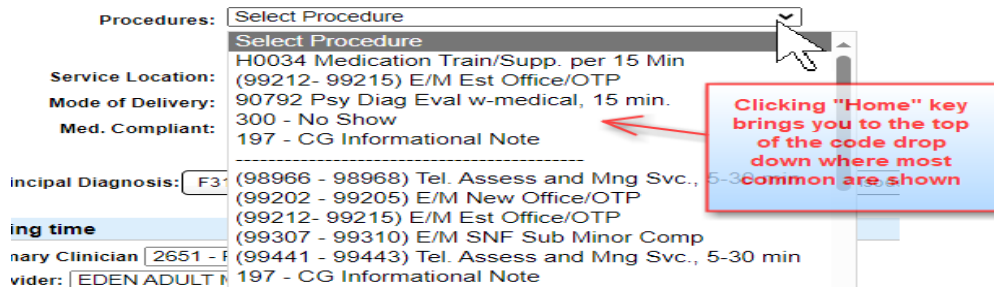
**HELPFUL HINT:**

Use the Home and End keys on your keyboard to quickly move to the top or bottom of a screen or to the top or bottom of a drop-down menu.

- When you first land on the View Draft Service screen, hit “End” key to fly to the bottom of the screen where the Edit button is.



- In a drop-down menu, hit the “Home” key on your keyboard to go to the top of the list.



**INDIRECT SERVICE NOTES**

Indirect Services are processed in the same manner as Direct Service notes, but with fewer fields.

1. Click on the blue dot or the Service # to View the Note.

Svc #	Gsr #	Client #	Client Name	Provider	Date	Template	Procedure	Sort	Reviewer
5710954				OAKLAND ADUL...	7/21/2023	Physician ...	MEDICATION ...	○ Draft	
5710957				OAKLAND AD M...	7/21/2023	Physician ...	MEDICATION ...	○ Draft	
5711177				OAKLAND LEVE...	7/21/2023	Physician ...	99214 E/M ES...	○ Draft	
5711218				OAKLAND ADUL...	7/21/2023	Indirect	Paid Time Off	○ Draft	

2. Note the Procedure, Location, and Time (Sometimes the Procedures don't get displayed on the edit screen. If the procedure doesn't forward to the edit screen, you can arrow back to see it.)

Indirect Service (5711218) Primary Clinician: Type: Indirect Note

Provider: OAKLAND ADULT SERVICE TEAM 2

Procedure: Paid Time Off

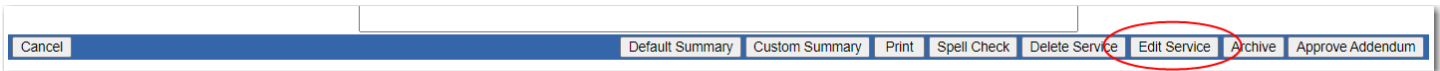
Service Location: Home Mode of Delivery:

Emergency: No

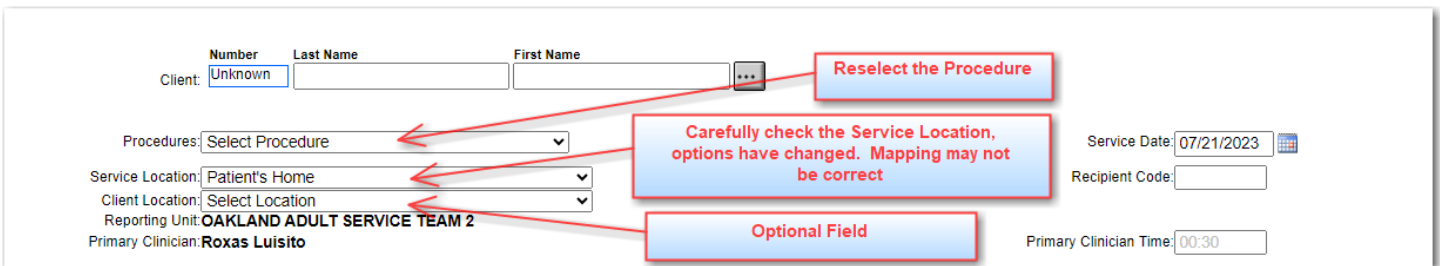
Pregnant/Post-Partum: No

Role	Staff #	Staff Name	Preferred Name	NPI	Time
Primary Clinician	2651	Roxas, Luisito, MD		1295713386	00:30 Edit

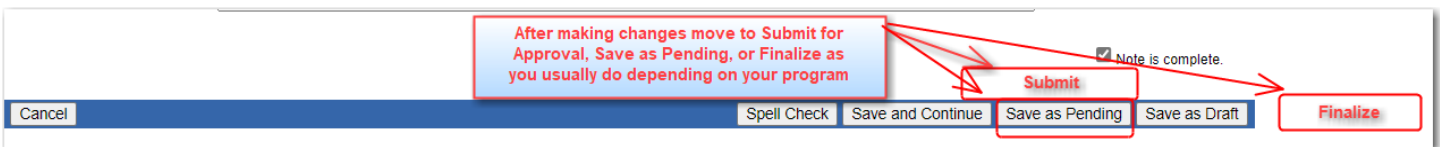
### 3. Click Edit Service



### 4. Verify and update the billing data for Procedure and Location. The time is not editable.



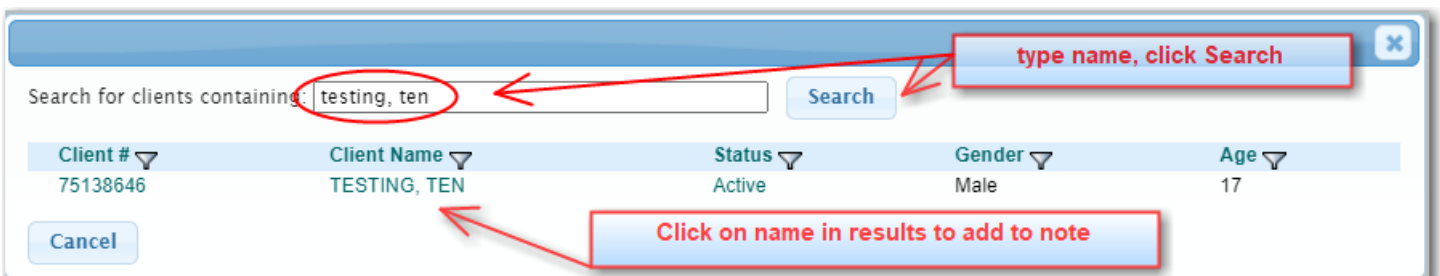
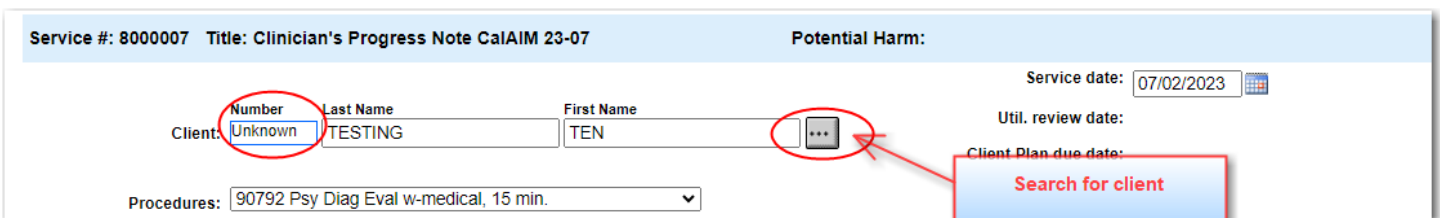
### 5. Move to Finalization: After making changes to the billing header, process as your program normally does. Either Submit for Review, Save as Pending, or Finalize.



## CLIENTS WHO WERE REGISTERED IN INSYST AFTER THE CUT-OFF DATE:

Clients as of 7/1/23 were last migrated from InSyst to SC. Providers were informed that clients should no longer be registered in InSyst. A few clients were registered and opened in InSyst after the cutoff date. Those clients IDs and enrollments do not exist in SmartCare and therefore also do not exist in CG-SC.

- When the InSyst client IDs and enrollments do not exist in CG-SmartCare, their notes will migrate but the client ID # will not be included on the note.
- The clients will need to be registered in SmartCare to obtain an SC client ID # and enrolled in the program.
- Those IDs and enrollments will then transfer to CG-SC.
- After the new SmartCare client ID # and program enrollment has transferred to CG-SC, clinicians will need to find the notes in in CG-SC and add the new SmartCare client ID # using the ellipsis button



**NOTES BY STAFF WHO HAVE LEFT YOUR ORGANIZATION:**

We are researching a possible solution for notes that were completed by a staff person who has left your organization. We will post a separate notice when the issue has been resolved.