

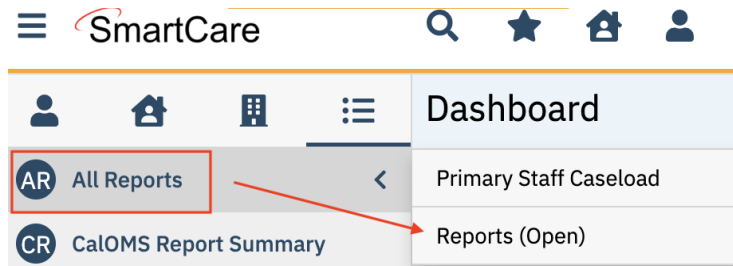
SmartCare Reports User Guide

Invoice Report – Staff Details

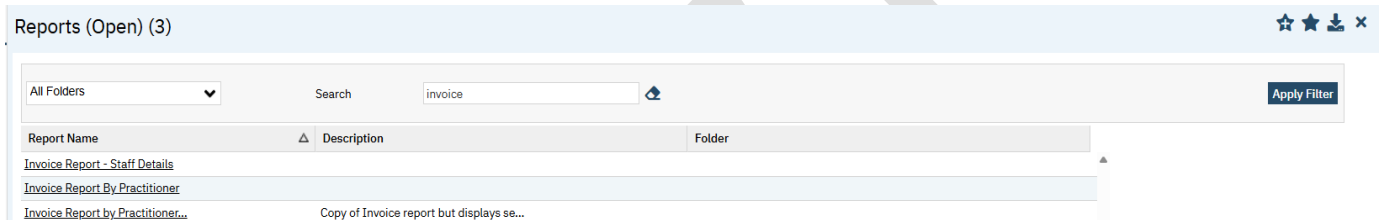
SmartCare Report Name	Invoice Report – Staff Details (My Office)
Report Purpose	This report lists all the completed services by the clinician based on the selected program. Reports are based on completed services only.
Replaces InSyst Report	MHS 855 Staff Detail
Report Timing	Providers will be able to generate real-time invoice reports from SC.
Record Selection	<ul style="list-style-type: none"> Completed Services displayed in the list are chosen by the selected parameters: <ul style="list-style-type: none"> ➤ Start Date: This is the starting date for the services you want to include in your view. ➤ End Date: This is the ending date for the services you want to include. ➤ Program Name: You can filter services by the specific programs they belong to. Clinician: This identifies the clinician who delivered the service. Procedure Code ID: This is a unique identifier assigned by SmartCare to each procedure code. Procedure Code Name: This procedure code identifies specific medical services or procedures performed by the Clinician. Time (hours): This represents the actual duration a client received the service, measured in hours. Time is in hours or units (depending on program type). Travel Time: This indicates the time a client spent traveling for the service. Documentation Time: This is the time the clinician spent on documentation related to the service. Units: These are units calculated based on defined minutes. It is derived from Charges, which is a calculation done by a SmartCare process that looks at procedure rates. Service Count: This simply tells you the total number of services completed by a clinician by procedure code.

Instructions:

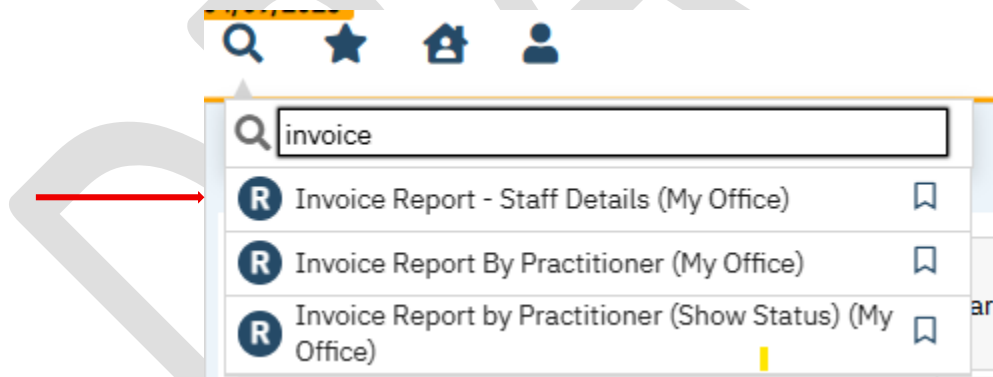
1. From the SmartCare home page, hover over **All Reports** on the menu at the left. Select **Reports (Open)** to open the List Page that shows all SmartCare reports.



- The Reports screen will open displaying all SmartCare reports. To see the **Invoice Report – Staff Details**, type “invoice” in the Search box and hit Enter or click on the blue **Apply Filter** button at the right to narrow down the report list. Select **Invoice Report – Staff Details**.



- You can also find the report by using the magnifying glass search box and typing in “invoice” and selecting **Invoice Report – Staff Details (My Office)**.



- The report parameters will appear in a separate window. In the **Start Date** field, enter the first date you want included in the report. In the **End Date** field, enter the last date you want included in the report.
- Using the Multi-select dropdown list, select one or multiple programs in the **Program Name** field. To select programs, select the ☒ check next to the program name in the drop-down list. Providers can select as many programs as needed; there is no selection limit in the program list.

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Invoice Report – Staff Details

- Select the blue View Report button in the right-hand corner of the pop-up window.

NOTE: Providers are limited to access to the Programs within their applicable CDAG permissions. Please note that the larger the file, the longer it may take to generate.

Start Date: 1/1/2025 End Date: 6/18/2025
Program Name: A BETTER DRIVE IN HOME MHS CHILD View Report

- The report will appear for the dates and program(s) selected. If there are multiple pages, use the arrows on either side of the page number box to move through the pages. If there are many pages and you are looking for something specific, use the search box by typing in a keyword and clicking on **Find**. Click **Next** to see all instances of the word that was searched.

Start Date: 1/1/2025 End Date: 6/18/2025
Program Name: A BETTER DRIVE IN HOME MHS CHILD
Page: 1 of 1
Search Box: benjamin Find Next
Run Date: June 25, 2025 15:02
Created By: Anjali Shahi

Invoice Report - Staff Detail

January 1, 2025 through June 18, 2025

A BETTER DRIVE IN HOME MHS CHILD (12345)

Clinician	Procedure Code ID	Procedure Code Name	Time(hours)	Travel Time	Documentation Time	Units	Billable Minutes	Service Count
Danielle Benjamin	33	H2017 Psychosocial Rehab	0.13	0.00	0.00	1	15	1
	63	99484 BehavHlth Care Mgmt.	0.33	0.00	0.00	1	20	1
	869	H2000 Child Fam Team Facilitator	0.13	0.00	0.00	1	15	1
	Danielle Benjamin Total		0.59	0.00	0.00	3	50	3

- In the report example below, you can see all the completed services for the selected program by the clinician.

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Invoice Report – Staff Details

Start Date: 1/1/2025 End Date: 6/18/2025

Program Name: A BETTER DRIVE IN HOME MHS CHIL

Search Box: benjamin Find Next

Behavioral Health Department
Alameda County Health

Run Date: June 25, 2025 15:02
Created By: Anjali Shahi

Invoice Report - Staff Detail

January 1, 2025 through June 18, 2025

A BETTER DRIVE IN HOME MHS CHILD (12345)

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	Danielle Benjamin Total		0.59	0.00	0.00	3	50	3

9. To export the report, click on the **Export** icon and select the desired export format. Best practice is to use Word, Excel or PDF to download the report. To print the report, click on the **Print** icon.

10. Created By: Automatically pull from the staff that is running the report.

SmartCare Reports User Guide



Invoice Report – Staff Details

Start Date End Date

Program Name

Export Print

1 of 2 Find | Next

Word *
Excel *
PowerPoint
PDF *
TIFF file
MHTML (web archive)
CSV (comma delimited)
XML file with report data
Data Feed
CSV No Header

NOTE: Before exporting the report to Excel, please delete the first 8 rows. This ensures that sorting and filtering functions work correctly.

Guidance/Considerations:

- Timing: SmartCare requires 3 days post-entry for services to be processed and appear in reports. Providers must complete service entry 3 days before the invoice is run to ensure inclusion. Timely data entry affects payment.
- Only “completed” services appear on the invoice report. Services in “show” status must be corrected by providers before they can be billed.