

SmartCare Training

PEI/UERP Providers Workflow

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PEI/UELP End User Training Objectives

1 . SmartCare Overview and Basic Navigation

- How to navigate through the SmartCare application and populate data fields based on State required guidelines
- SmartCare Navigation/Widgets/Favorites/Quick links/Smart links

2 . Search for a Client & Create New Potential Client

- Client Search
 - Search for an existing client
- Update Client Information
 - Insert Address
- Create a new potential client record
 - Client ID generation
- Client Information Screen/Tabs

3 . Program Assignment:

- Program Enrollment (*previously this was known as an Opening an Episode*).
- Program discharge (*previously this was known as closing an Episode*).

4 . PEI/UELP Client Demographics Information

- PEI/UELP Data (Client)

ACBH Systems & Data Confidentiality, Security and Usage Agreement

**ACBH SYSTEMS & DATA
Confidentiality, Security and Usage Agreement**

Systems

SmartCare, Clinician’s Gateway, eCURA, Yellowfin, CANS/ANSA, MEDS, etc.

Purpose

The purpose of this agreement is to establish an environment of security for the electronic storing and usage of client confidential information and records including the usage of portable electronic devices for this purpose.

Background

Any person accessing Alameda County ACBH (Behavioral Health Care) data is required to protect confidential information relating to clients, patients, and residents on a daily basis, and have a duty to protect this information from loss, theft, or misuse whether the information is in paper or electronic form. Additionally, users are required to protect any electronic device assigned to them or in their possession used to gain access to ACBH systems.

Confidential Information

Confidential Information shall include all Alameda County ACBH systems, documents, data, and other materials. User agrees that the Confidential Information is to be considered confidential and shall hold the same in confidence, shall not use the Confidential Information other than for the purposes of its business with ACBH, and shall disclose it only to its authorized employees or other authorized users with a specific need to know. User will not disclose, publish or otherwise reveal any of the Confidential Information and must use **secure email** for any communications outside of Alameda County regarding confidential information. [redacted] Initial

Secure and Private Work Environment

User is responsible for taking proper security and privacy precautions ensuring a secure and private work environment while utilizing portable devices in order to safeguard client information displayed. [redacted] Initial

Security Agreement

User agrees to the stated required security criteria in order to access and utilize the ACBH systems.

I understand that sharing my account ID and password, client information or any breach of security is a HIPAA (Health Insurance Portability and Accountability Act) violation which may result in prison, fines up to \$25,000 and/or revocation of my license. [redacted] Initial

I attest that I have completed HIPAA security and privacy requirements training for protecting the confidentiality, integrity, and availability of protected health information under HIPAA within the past 12 months.

[redacted]

User Signature

[redacted]

User Printed Name

[redacted]

Date

The supervisor agrees 1) to employee’s usage of the system and 2) to provide information and direction for secure uses and practices while utilizing network resources.

The supervisor attests that the user has 1) signed an Oath of Confidentiality, 2) signed an Ethical Conduct Policy and 3) been trained in HIPAA security and privacy requirements.

[redacted]

Supervisor Signature

[redacted]

Supervisor Printed Name

[redacted]

Date

18 PHI Identifiers Under HIPAA

1. Names
2. Geographic subdivisions smaller than a state, Geocodes (e.g.-> zip, county, or city codes; street addr, etc.)
3. Dates. All elements of dates except year, unless individual is > 89 yrs. (e.g.-> birth date, admission date, etc.)
4. Telephone numbers
5. Fax numbers
6. Electronic mail addresses
7. Social security numbers
8. Medical record numbers
9. Health plan beneficiary numbers
10. Account numbers
11. Certificate/license numbers
12. Vehicle identifiers and serial numbers (including license plate numbers)
13. Device identifiers and serial numbers
14. Web Universal Resource Locator (URL)
15. Internet protocol (IP) address number
16. Biometric identifiers (including finger or voice prints)
17. Full face photographic images and any comparable images
18. Any other unique identifying number, characteristic, or code



What Is SmartCare:

SmartCare™ is a web-based software designed for Substances Use Disorder and Mental Healthcare organizations. Its primary purpose is to facilitate the coordination, reporting, and management of payment for all service delivery processes. With SmartCare, organizations can effectively maintain, protect, and organize health information pertaining to their clients. Furthermore, it serves as a central repository for collecting data used in eligibility determination and for generating local, state, and federal reports.

One of the key strengths of SmartCare is its commitment to being the most open and user-friendly application available in the market. It recognizes the dynamic nature of the health and human services industry and strives to remain adaptable to changing market conditions. SmartCare achieves this by employing an open-architecture framework that allows customers to easily update and expand the system to meet their evolving needs.

By adopting SmartCare, organizations gain access to a comprehensive software solution capable of mapping and incorporating their entire range of business processes into a single platform. This integration enables streamlined operations and improved efficiency. Moreover, SmartCare is designed to grow and evolve alongside the organization, ensuring it can effectively support future business requirements.

1. Portal & SmartCare Log In

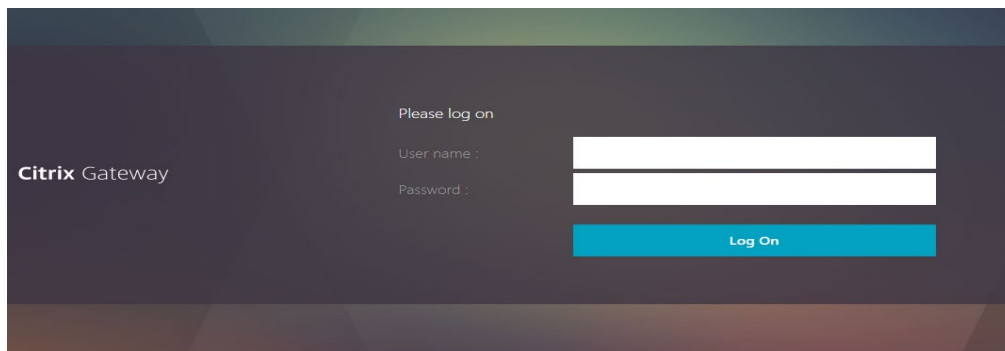
[Logging onto the ACBH Web Portal](#)

You must log in to the ACBH Web Portal to access SmartCare.

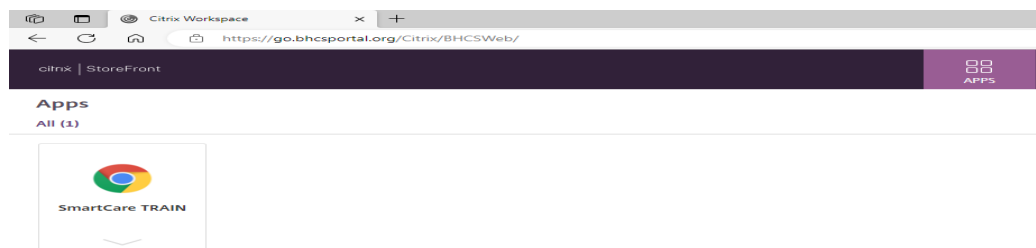
- ACBH Staff will use the URL to open SmartCare once you log on to the County Secure Network.
- CBO Agencies will use the ACBH Web Portal to access SmartCare.

If this is your first time logging in to the portal the system may prompt a Citrix Workspace installation message. Please follow the prompts, and download the Citrix Workspace as needed. If this is a company managed PC/Laptop, you will need your support team to install the software, as they have Administrative Credentials. If assistance is needed please contact the Help Desk for assistance.

1. The ACBH Web Portal address is: <https://go.bhcsportal.org>
2. Type your network Username, and press Tab.
3. Type your network password and press Return or click the Log On button. To protect password secrecy, the password is displayed on the screen as dots.



4. To log in to SmartCare choose the Apps option and select the SmartCare Train Icon.

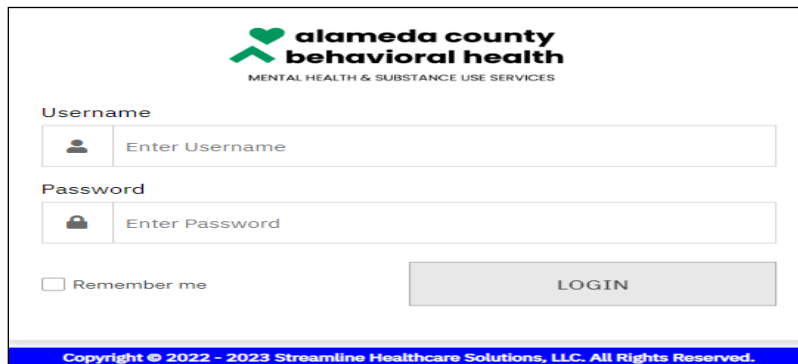


5. Click the SmartCare icon to prompt a new Chrome Window to open the SmartCare Log on Screen.
6. Click the SmartCare icon to prompt a new Microsoft Edge Window to open the SmartCare Log on Screen.

[Logging into the SmartCare System](#)

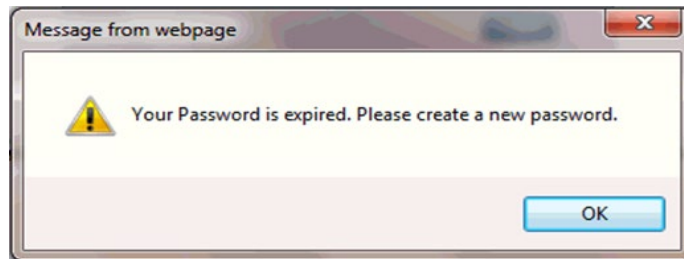
The first time you log in to the SmartCare system, follow these steps:

1. At the login page, you will be required to enter your Username and Password. After entering these two pieces of information, click “Remember Me” so that you will not have to repeatedly enter your password each time you open the application.
2. Click the LOGIN button.

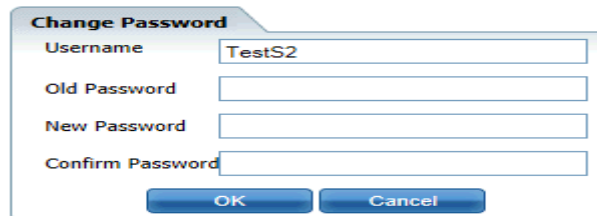


The screenshot shows the login interface for Alameda County Behavioral Health. At the top, there is a logo with a green heart and the text "alameda county behavioral health" and "MENTAL HEALTH & SUBSTANCE USE SERVICES". Below the logo are two input fields: "Username" with a person icon and "Enter Username" text, and "Password" with a lock icon and "Enter Password" text. There is a "Remember me" checkbox and a "LOGIN" button. At the bottom, there is a blue footer with the text "Copyright © 2022 - 2023 Streamline Healthcare Solutions, LLC. All Rights Reserved."

3. You may get this pop-up window telling you to set your Password:



4. Click the **OK** button.
5. You will then be taken to this screen:



The screenshot shows a "Change Password" dialog box. It has four input fields: "Username" (containing "TestS2"), "Old Password", "New Password", and "Confirm Password". There are "OK" and "Cancel" buttons at the bottom.

6. Enter your existing temporary password in the Old Password field.
7. Enter a new password in the New Password field.
8. Enter the new password again in the Confirm Password field.
9. Click the **OK** button.

You will then be taken to the login screen again, where you enter in the new password that you just created and click the Login button.



After logging in for the first time, the system will now ask you to set security questions.

The image shows a "Security Questions" form. The title "Security Questions" is in a dark blue header. Below the title are three rows, each with a "Security Question" dropdown menu and an "Answer" text input field. At the bottom of the form are two blue buttons: "Save" and "Cancel".

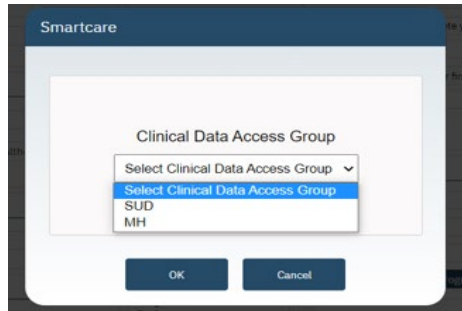
These questions are to ensure security for logged in users. The answers you enter are case sensitive.

If you have logged on previously, the logon will take you directly to one of the security questions you have selected. Supply the answer and select the "Remember Me" radio button, then click the Submit button.

[What is CDAG](#)

Clinical Data Access Groups (CDAG) ensure that staff only have access to see client chart information in SmartCare that is applicable to the service line (Mental Health or Substance Use services) that they serve. When you login into SmartCare you will need to choose between SUD and MHS organizations.

If you are only in one organization this should be seamless to you and you will not need to select anything. If a clinician provides both Mental Health and Substance Use services, the provider will be associated with both MH and Substance Use CDAG groups and will be prompted to select a CDAG group when logging into SmartCare.



In the below example, Clinician A is logged in as a SUD staff person and therefore only sees the client's SUD services.

Services (4)

Show Services Only All Statuses All Clinicians **Apply Filter**

All Programs DOS From 11/20/2022 DOS To Include Services created from Claims

Only include Services with Add On Codes

DOS	Procedure	Group Name	Units	Status	Clinician/Provider	Program
05/19/2023 10:30 AM	Individual Therapy 60 Min...			Show	Rapp, Chris M.D.	SUD Outpatient
05/05/2023 03:30 PM	Assessment 90 Minutes			Show	Rapp, Chris M.D.	SUD Outpatient

2. Basic Navigation & Overview of SC System

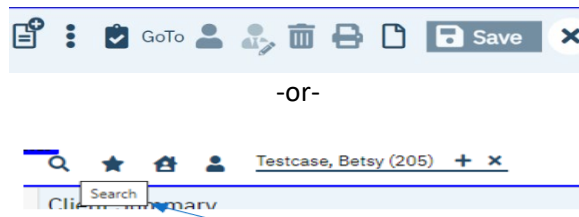
Users will experience SmartCare as a series of connected modules, all accessible from the Quick Links menu on the left side of screen or from the Search function. SmartCare was designed to enhance the user experience and to provide new system users with tools to navigate easily.

[Overview](#)

A tool bar appears on every page in the system. It is located to the right of the page's title.

[Common Toolbar Items](#)

The tools displayed on this bar can vary by screen or by the list page you are currently looking at. Below are some examples.



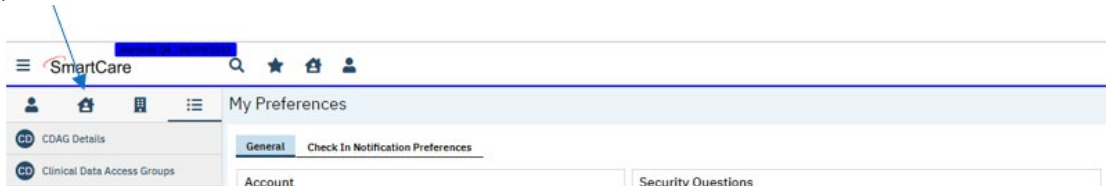
TIP: Hover over a specific tool to display its name.

Sometimes the Toolbars are too large for the size of your screen, so if you hover your arrow to the far right of the screen, other tools will appear.

NOTE: Some tools are permissioned, but denied tools will still be visible, but they will appear grayed out.

[SC Navigation](#)

Navigation filters above the Quick Links section allow you to sort by Client, Provider, Other or display All Quick Links.



Icon	Name
	Client
	Provider
	Other
	All

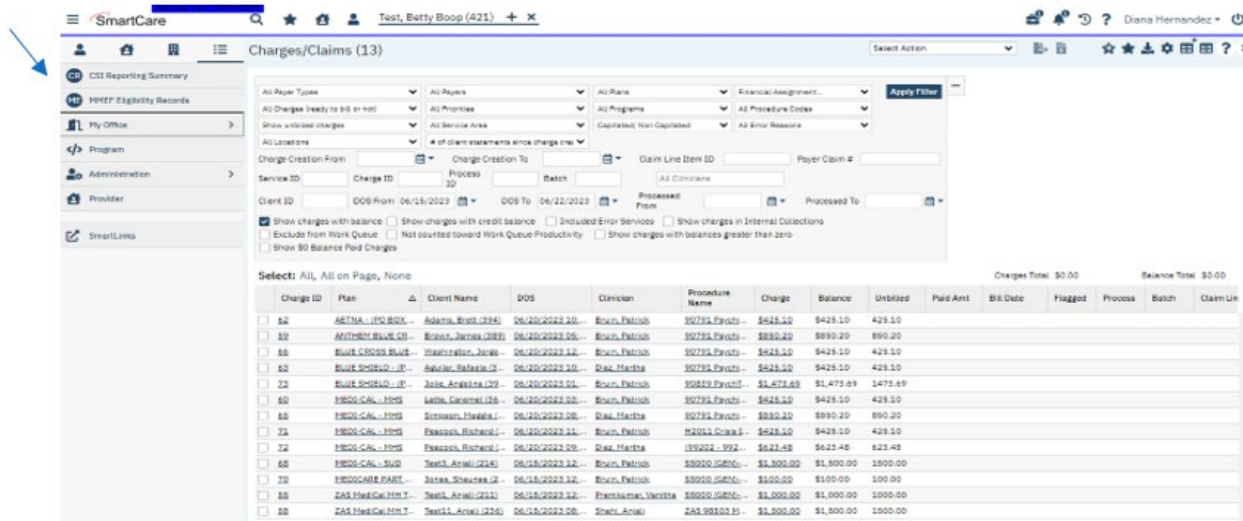
TIP: By clicking on SmartCare Icon you land back on your homepage.

When you log into SmartCare you will want to personalize it to meet your specific business needs. This can be done by personalizing:

1. Quick Links
2. My Preferences
3. Dashboards
4. Widgets
5. List Pages
6. Smart Links
7. Client Flags

#1: Quick Links

Quick links are a quick way to navigate to specific screens and specific parts of SmartCare. These are meant to be at your fingertips and enable you to do your job. These can be found on the lefthand side of your screen:



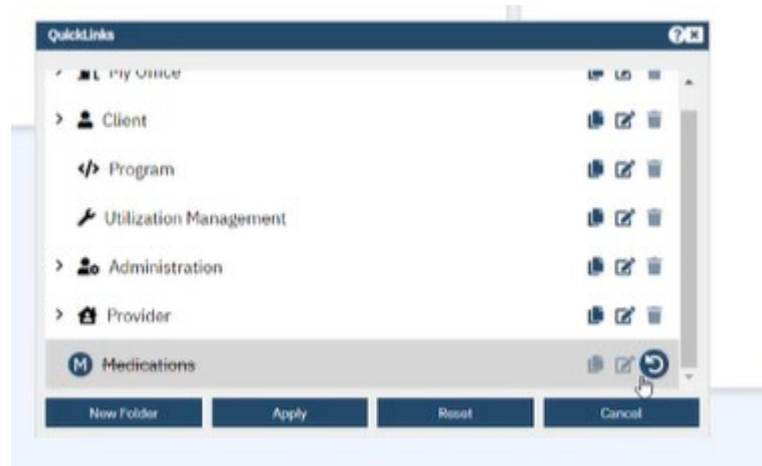
You can build and tailor these "Quick Links" to allow you to efficiently navigate between the different aspects of your job, without having to type in what you are looking for. To access and manage your "Manage QuickLinks" feature:

1. Locate the drop-down arrow next to your username in the upper right-hand corner of the screen.



2. Click on the drop-down arrow to open a menu of options.
3. Look for the "Manage QuickLinks" section and click on it.
4. Once inside the "Manage QuickLinks" section, you will have the ability to personalize the QuickLinks navigation according to your preferences.

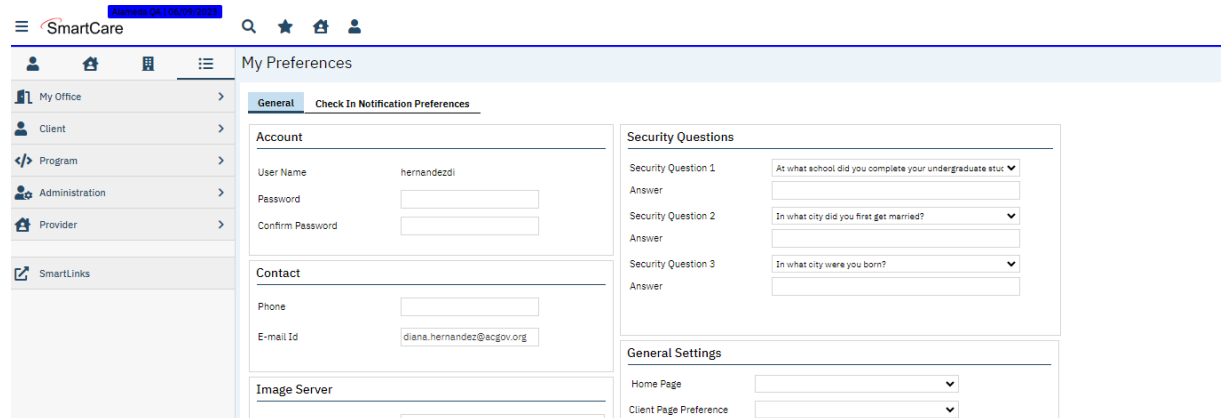
You can use this section to Reorder, Delete or Edit the Quick Links displayed names.



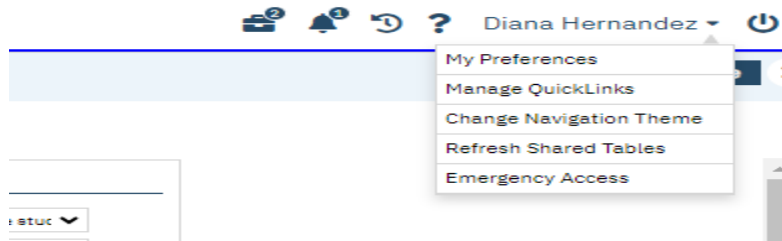
NOTE: Users may have core functions linked to specific screens, so please work with your organization to determine what the standards should be.

#2: My Preferences

Once you are logged into the system, the first screen you see may be My Preferences. On the General tab, sign-in to set up your default Preferences section for the various sections of the SmartCare system.



If this is not the first screen you see, navigate to the “My Preferences” screen by clicking the drop list arrow next to your name in the top right corner of the screen, and select “My Preferences” button.



General Setting Section

In the General Settings section set the following settings:

General Settings	
Home Page	Dashboard
Client Page Preference	Client Summary
Provider Page Preference	
Default Program View	<input type="button" value="New Program View..."/>
Diagnosis Search Preference	

1. **Home Page Dropdown:** Select the name of the Page/Dashboard that you want to open in the “My Office tab” when you login to the SmartCare system or when you click on the My Office tab when in the system. This will be the main page when you login every time.

Generally, this is set to view 'Dashboard' as shown in the screenshot above. After making your selection, click the button located under your login name in the top right corner. (IMPORTANT: Be sure to perform a “Save” following any changes while logged into your account).

NOTE: If a Home Page option is not selected, the system will default to the “My Preferences” screen when you log in.

2. **Client Page Preference Dropdown:** This is the client record that you want to first appear when you open a client page.
NOTE: If the Client Page Preference is left empty, it will default to the the Client Summary screen which will display when opening a client when you perform a Search or select Open this Client.

3. **Provider Page Preference Dropdown:** This field identifies the Screen to which you are redirected upon selecting a provider in the system.

4. **Default Program View:** Setting a Program View lets you define the programs that you can filter for while using the Program Assignments page. The Program View you set up are displayed in the All Program Views dropdown list on the Filter portion of the Program Assignments page on the Program tab.

5. **Click the New Program View button.** The Program Views window is displayed. Type the name of the Program View you are creating in the Program View Name field.

Select the checkbox next to each program you want to include in your Program View.

Staff/Program Views

Program View Name:

Define View

All Program Name

<input checked="" type="checkbox"/>	A BETTER WAY ALAMEDA SCH MH CH (01LL1)
<input type="checkbox"/>	A BETTER WAY EPSDT MHS CHILD (01KA1)
<input type="checkbox"/>	A BETTER WAY IN HOME MHS CHILD (81944)
<input type="checkbox"/>	A BETTER WAY MHS CHILD (81941)
<input checked="" type="checkbox"/>	A BETTER WAY PIEDMONT ELEM SCH (01431)
<input type="checkbox"/>	A BETTER WAY POST ADOPT MHS CH (81942)
<input type="checkbox"/>	A BETTER WAY ROOSEVELT SCH CHD (01RH1)
<input type="checkbox"/>	A BETTER WAY SART 0-5 MHS CHLD (81947)
<input checked="" type="checkbox"/>	ABODE GREATER HOPE OAKLAND FSP (01651)
<input type="checkbox"/>	ABODE SERVICES THOT ADULT (01DM1)

-or-

Select the **All** Programs checkbox to have all programs set up in SmartCare listed in the Program View.

Staff/Program Views

Program View Name:

Define View

All Program Name

<input checked="" type="checkbox"/>	A BETTER WAY ALAMEDA SCH MH CH (01LL1)
<input checked="" type="checkbox"/>	A BETTER WAY EPSDT MHS CHILD (01KA1)
<input checked="" type="checkbox"/>	A BETTER WAY IN HOME MHS CHILD (81944)
<input checked="" type="checkbox"/>	A BETTER WAY MHS CHILD (81941)
<input checked="" type="checkbox"/>	A BETTER WAY PIEDMONT ELEM SCH (01431)
<input checked="" type="checkbox"/>	A BETTER WAY POST ADOPT MHS CH (81942)
<input checked="" type="checkbox"/>	A BETTER WAY ROOSEVELT SCH CHD (01RH1)
<input checked="" type="checkbox"/>	A BETTER WAY SART 0-5 MHS CHLD (81947)
<input checked="" type="checkbox"/>	ABODE GREATER HOPE OAKLAND FSP (01651)
<input checked="" type="checkbox"/>	ABODE SERVICES THOT ADULT (01DM1)

Click the **Insert** button.

The Program View is displayed in the Programs Views area of the window.

Program Views		
	View Name	Programs
<input checked="" type="checkbox"/>	A BETTER WAY ALAMEDA	Some
<input checked="" type="checkbox"/>	ACBH Test Program View	Some

To set up another Program View, repeat steps 2 through 5.

-or-

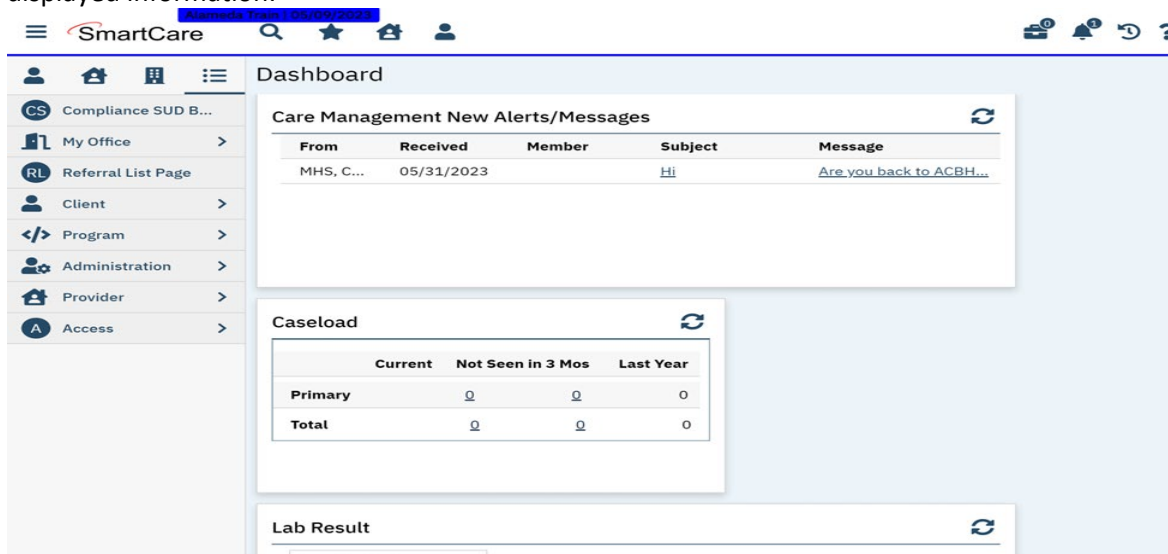
If you are finished setting up a Program View, click the Save button. You will now be able to select your custom view from the Default Program View drop list.

NOTE: Diagnosis Search Preference Dropdown: This is an obsolete and should not be populated.

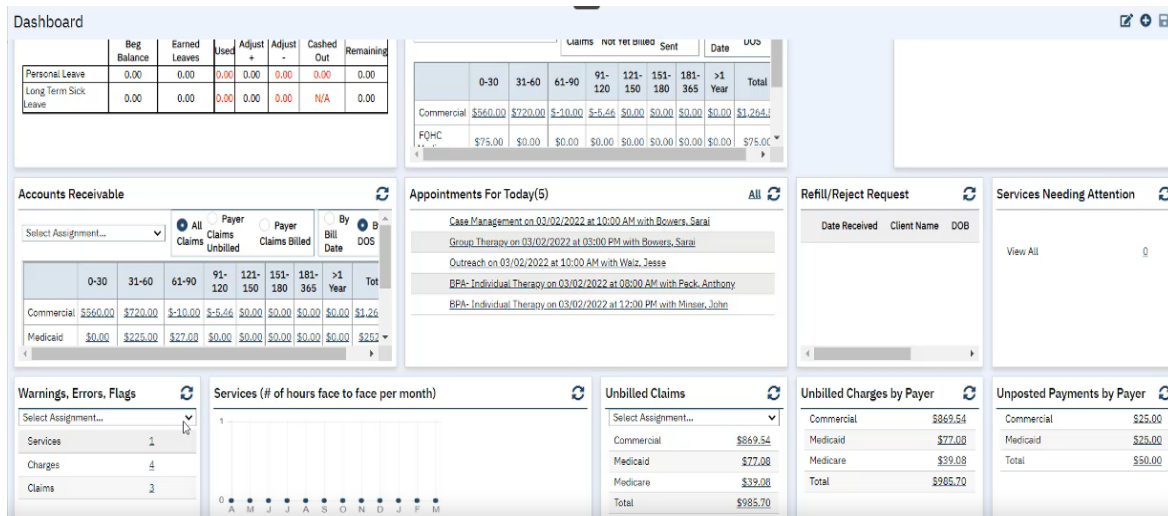
#3: Dashboards

The Dashboard is the central page of the SmartCare system. SmartCare main screens are either Dashboards or List Pages that display data and have links. From the Dashboard, you can quickly view pertinent information and access the detailed screens or list pages.

The Dashboard “My Office” is a central screen containing widgets, with real time data, as well as links to important screens for related workflows. Links and widgets can be clicked on to bring you to the displayed information.



NOTE: Dashboards are hub pages, that can be customized and organized to meet your business needs.



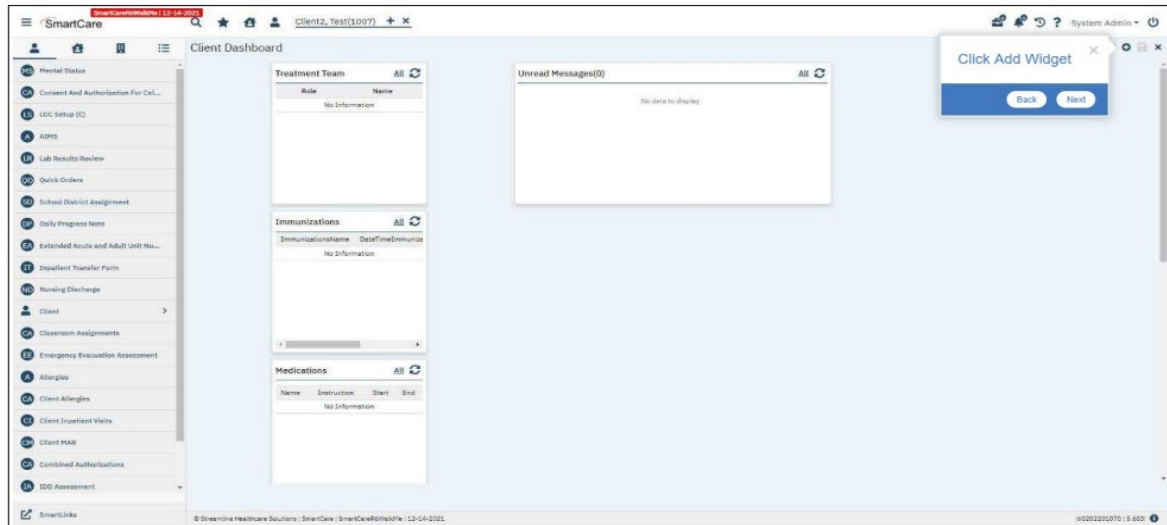
In addition, there are specialized Dashboards, e.g. Billing Dashboard, Provider Dashboard, etc. that can be updated with widgets specific to you. You can select which screen is displayed when you sign on and these dashboards can be tailored to meet your specific needs.

BEST PRACTICE: A good Dashboard should never require much scrolling.

#4: Widgets

Widgets gather information that the staff may need to act on, and provide a hyperlink to the page/screen where the staff can drill down or complete the items listed. Information is presented on the Dashboard in the form of widgets.

Each tile on the Dashboard is a widget, that you can resize and edit the display. Widgets are part of the core functionality of SmartCare, and are displayed on the staff's dashboard. You tailor the dashboard through the use of widgets.



The great news is that you can customize these widgets by adding, removing or deleting a widget to meet your needs.

The order in which the widgets are displayed on the dashboard is determined by the default Order on the Widget Details screen. And widgets are permission based and they should be considered as part of your roles and permissions setup. Only the relevant widgets should be permissioned to each user.

NOTE: Click the reload icon (🔄) to refresh the widget. The data in the widget is refreshed/recalculated based upon the value set in the Auto Refresh Interval setting.

The Accounts Receivable Widget displays claims by age. Using selectable filters, it can be restricted to Unbilled or Billed claims, or organized by Bill Date or Date of Service. You can also filter by Financial Assignment by selecting the dropdown.

Commercial	0-30	31-60	61-90	91-120	121-150	151-180	181-365	>1 Year	Total
Commercial	\$0.00	\$0.00	\$680.00	\$20,490.60	\$20,400.00	\$20,400.00	\$120,888.70	\$1,726,882.12	\$1,927,141.22
Contracts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,992.88	\$9,992.88
County	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$59,356.15	\$59,356.15
Coventry	\$0.00	\$0.00	\$520.00	\$15,660.00	\$15,600.00	\$15,600.00	\$96,200.00	\$1,010,007.24	\$1,153,527.24
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,348.80	\$3,348.80
	\$0.00	\$0.00	\$3,300.00	\$3,300.00	\$3,300.00	\$23,043.90	\$566,717.97	\$599,771.87	\$599,771.87
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,499.60	\$219,841.72	\$220,967.92	\$220,967.92

The “Warnings, Errors, Flags Widget” displays the total number of Services, Charges and Claims that have a system issue and need to be corrected. Like other Billing Widgets, the Warnings, Errors, Flags Widget can be filtered by financial assignments.

Services	Charges	Claims
4512	11685	806

Many Widgets (depending on the kind of information they display) draw their information from and link to List Pages.

#5: List Pages

Selecting a page will typically take you to a list page where information is summarized. Key information in SmartCare is stored or displayed via List Pages, and entered via Detail Pages and Documents referenced by a specific List Page.

List Pages serve an important role in the management of information. Aside from being the location where information is stored and displayed, List Pages are also filterable to search and sort specific types of needed information.

Client Name	DOS	Units	Charge (Rate Id)	Procedure	Status	Clinician	Program	Location	Comment
Test, Christin...	04/13/2022...		50.00 (1)	Individual T...	Show	Buckley, Chri...	Main St - Ad...	Office	
Test, Christin...	04/14/2022...		50.00 (1)	Individual T...	Show	Buckley, Chri...	Main St - Ad...	Office	
Test, Beth (1...	04/11/2022...		50.00 (51)	BPA- Individ...	Schedul...	Scott, Beth	Maple Ave - ...	Office	
Test, Beth (1...	04/11/2022...			Case Manag...	Show	Scott, Beth	Main St - Cas...	Office	
Test, Beth (1...	04/12/2022...			Case Manag...	Schedul...	Scott, Beth	Main St - Cas...	Office	
Test, Beth (1...	04/10/2022...			Case Manag...	No Show	Scott, Beth	Main St - Cas...	Office	
Test, Beth (1...	04/14/2022...			Case Manag...	Schedul...	Scott, Be			
Test, Beth (1...	04/15/2022...			Case Manag...	Schedul...	Scott, Be			
Test, Beth (1...	04/16/2022...			Case Manag...	Schedul...	Scott, Be			
Test, Beth (1...	04/17/2022...			Case Manag...	Schedul...	Scott, Be			
Test, Beth (1...	04/11/2022...			Case Manag...	Cancel (...)	Scott, Be			
Test, Beth (1...	04/28/2022...			Short Sessio...	Show	Scott, Be			

Data appears in the List. Most columns are sortable, and several fields give basic information on the entry. Click hyperlinks in the entries to navigate to detail pages related to that entry. (For example, clicking the date of service takes you to the Service Detail page, while clicking the Charge link takes you to a Charge Detail page.)

They are also able to be 'Favorited', which allows you to set commonly-used Filters and immediately apply them.

- The My Office tab contains list pages to help you organize your caseload and quickly access information.
- The Client tab contains list pages for list services, documents, disclosures and other information.

1. Use the Filters at the top of the List Pages to search for specific information in a list.
2. Click on the column headings to sort the list by the selected column.
 - Click the same column heading again to reverse the order of the list based on the selected column.
3. Lists with multiple pages will display page numbers on the bottom.
 - To navigate the pages, there are multiple options: You can select Page Number, Next/Last, or use the drop-down to navigate through the pages.

The screenshot shows a software interface with a left navigation menu and a main content area. The main content area displays a list of services with various filters and column headings. The filters include 'All Services', 'All Locations', 'Service Id', 'Entered From', 'Entered To', 'DOS From', 'DOS To', 'Include Services created from Claims', 'Only include Services with Add On Codes', 'Only show Non-Billable Services', and 'Organizational Hierarchy...'. The column headings are 'Client Name', 'DOS', 'Units', 'Charge (Rate Id)', 'Procedure', 'Status', 'Clinician', 'Program', 'Location', and 'Comment'. The list contains several rows of data, including client names like 'Duck, Donald (217)', 'Testcase_Keith (209)', and 'PhantEST_Davis (219)'. The interface also includes a 'Select Action' dropdown and a 'Filters' button.

#6: SmartLinks

SmartLinks are displayed in the Left Navigation Menu for the staff. SmartLinks are system generated links located in the Navigation sidebar under the QuickLinks. The SmartCare system learns which screens you typically navigate to from the current screen and creates SmartLinks to enable you to navigate there directly.

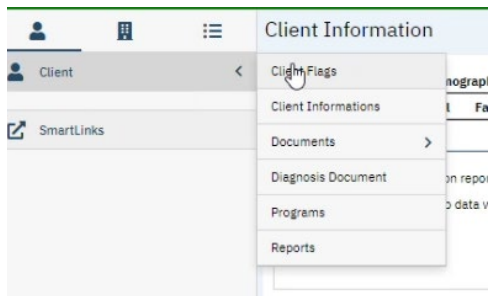


To help minimize the number of clicks required to get to the screens you frequently use, SmartCare creates SmartLinks to screens, reports, actions, or favorites that you visit regularly. The links in the SmartLinks section change over time depending on your system usage.

#7: Client Flags

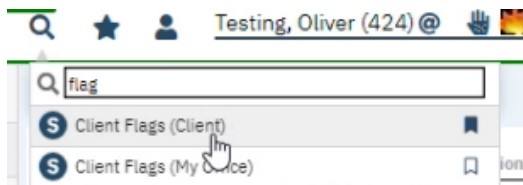
Flags are icons used throughout the SC system to point out or mark important information about a client. Permissions can be set on a flag to allow or limit staff from viewing a client's flag(s). To use flags in SmartCare, you can access "Client Flags" in two ways:

Go to Client and choose the Client Flags Option.



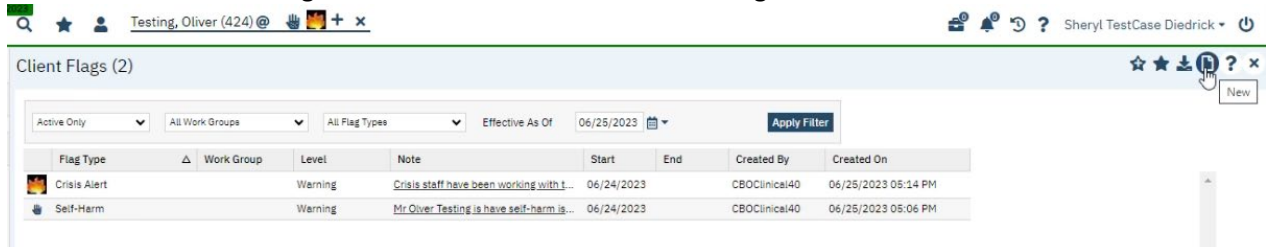
-or-

Complete a search, by typing in "flag":



In SmartCare, an event is referred to as a "flag". Each flag will have a due date that can then be tracked and, as the due date nears, can be completed.

1. On the Client Flags tab click on new button to add a flag.



2. Select the "Type" field and a dropdown will appear.

Client Flag Details

Note Information

Type ID Work Group Active

Level Protocol Protocol Flag ID

Note This flag recurs

Open Date Display Date Due Date End/Completed Date Completed By

Link to

Nothing

Document [Open](#) Assigned Users Assigned Roles

No data to display No data to display

Comment

Permitted Flag Do not display flag Never Pop Up Always Pop Up

3. Select the type of flag that you would like to add to the clients records.

Note Information

Type ID Work Group

Level

Note

Open Date

Link to

Nothing

Document

Comment

- Safety Plan Review
- Safety Risk
- Safety/Crisis Plan
- See patient account rep
- Self-Harm
- Services not Covered by Provider
- Staff Safety Concern
- Suicide Watch
- Supports Coordination
- Targeted Case Management
- TB Clearance Needed
- Treatment Plan - MCO Due
- Treatment Plan Needed
- Treatment Plan Past Due
- Tx Plan Client Signature
- Verify Coverage
- Verify Guardian
- Waitlisted Client
- WARNING
- WRAP

4. As appropriate, in the "Note" field add a comment.

Client Flag Details

Note Information

Type ID Work Group Active

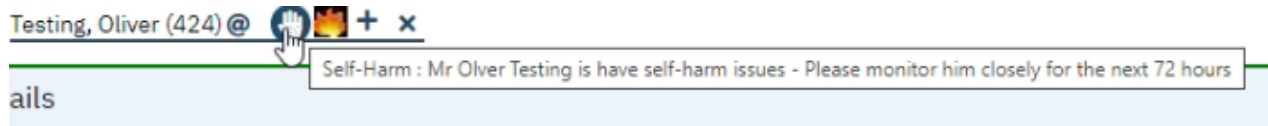
Level Protocol Protocol Flag ID

Note This flag recurs

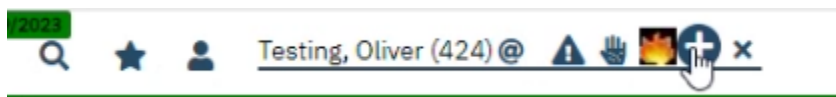
Open Date Display Date Due Date End/Completed Date Completed By

Link to

5. Click on Insert
6. Click on Save.
7. When you hover over the flag you can see the notes.

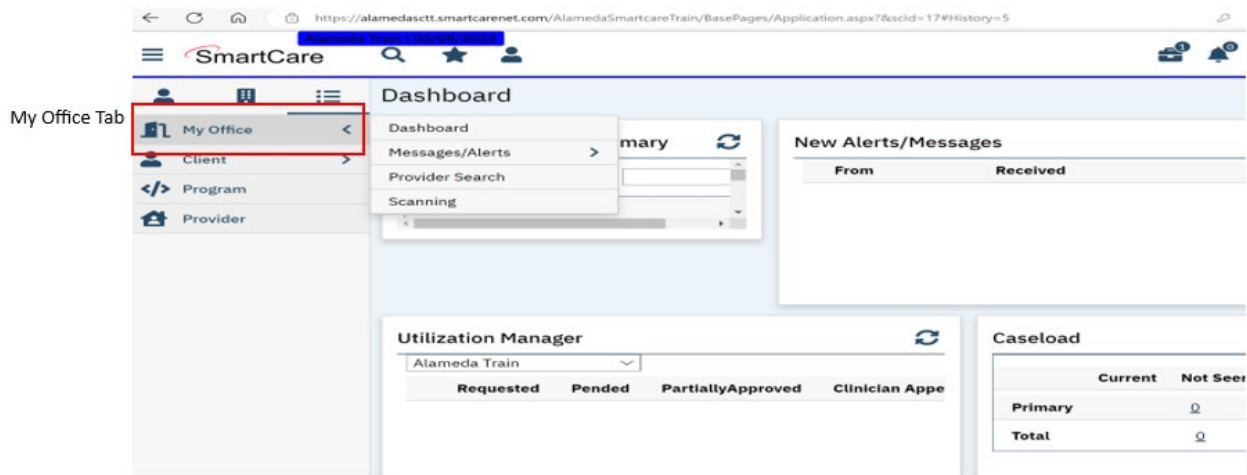


TIP: You can click on the add button to add additional flags.



[My Office Tab](#)

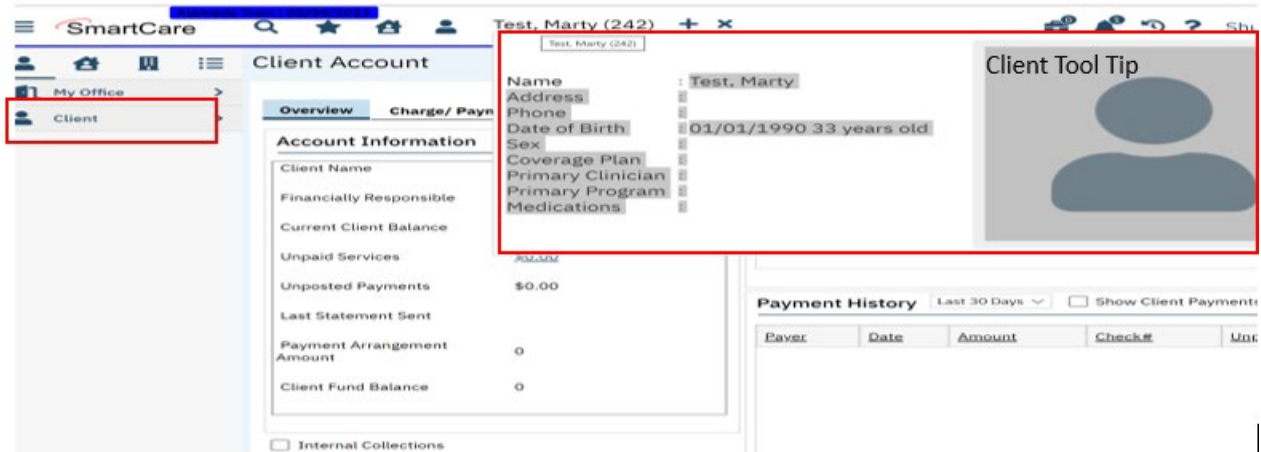
My Office Tab contains overall information on all client's records assigned to you based on your security permissions; different roles may view different information.



[Client Tab](#)

Client tab contains information in a client's individual record and only one client tab can be open at a time.

1. The clients name will display on the Client tab - last name, first name, followed by the client ID.












2. By hovering over client's name, while on Client tab, a Tool Tip will be displayed.
3. This Tool Tip will display information related to the client.
4. What is displayed can vary by role, depending on your security permissions.



System Quick Tips

1. Use the tab or mouse to move through pages, especially detail screens with multiple fields.
 - a. Depending on the screen, pressing the tab may be faster and on other screens the mouse is sometimes faster.
2. Make sure that you select the Save button before moving off a screen.

Commonly Used SmartCare Tools & Icons

Icon	Name	Description
	New	Will allow you to create a new entry based on the page that is displayed. For example, if the Authorizations page is displayed, clicking this icon displays the Client Search screen so you can create a new authorization for a client, or a new document or list page.
	Save	Will allow you to save what you are working on. Click this icon to save your work without closing the page.
	Close	Will close the screen you are currently on and take you to the previous screen.
	Delete	Displayed on certain pages, such as the Inpatient Activity Details page. Click this icon to delete the action displayed on the page. You will not be able to retrieve what you delete.
	Spell Check	Displayed on any page throughout SmartCare where there is a free-form Comment field. Use to check the spelling of any text entered in free-form comment fields you completed on the page.
	Export	Click this icon to export the data in the body of a list page into an Excel spreadsheet.
	Favorite(s)	Click this icon to display a hyperlinked list of favorite pages and windows you marked as favorites. Click the link to display the page or window. Use the New Favorite icon to save a favorite page. <ul style="list-style-type: none"> ▪ Filters are specific to a user.

Icon	Name	Description
		<ul style="list-style-type: none"> ▪ Filters are not specific to clients. ▪ To create a filter, enter all filter parameters in the list page and click Apply Filter, click on New Favorite(s). This will save the filter that is currently displayed on the list page, enter a filter name, click OK button to complete.
	Information	Provides information about screen/document (who and when created and modified).
	Copy Service	When selected this will open a calendar. Once date and time have been selected, Procedure and Location will copy from original service. <ul style="list-style-type: none"> ▪ This icon is meant to be used with services.
	Schedule Follow-Up	When selected will open calendar. Once date and time have been selected, Procedure and Location will copy from original service. <ul style="list-style-type: none"> ▪ This is meant to be used with services.
	Reschedule	When selected it will open a calendar. Once date and time have been selected New Entry Type pop-up will appear, unlike other times this will have a Reschedule option. Select Reschedule and enter cancel reason, then click OK. Service will then open with selected Date and time, Procedure and Location will copy from original service. <ul style="list-style-type: none"> ▪ This can only be used with Scheduled services.
	Messaging	Allows you to send a message and automatically attach client document to message. <ul style="list-style-type: none"> ▪ Utilized with Documents.
	Unsaved Changes Briefcase	<p>This briefcase contains items that have not been saved. If you have left pages where you entered or changed data and did not save the page, SmartCare holds onto the changes for a certain amount of time. The information on these pages is held to give you an opportunity to save your work.</p> <ol style="list-style-type: none"> 1. You can discard these changes by clicking "Discard All" or leave the changes unsaved by clicking the "Review Later" button or you may click "Cancel". 2. Unsaved changes should NOT be used to track items user needs to work on, widgets can accomplish this. 3. These changes only remain in your suitcase for 48 hours <p>BEST PRACTICE: Try not to have many unsaved changes or keep a document under unsaved changes for too long as items can become corrupted and can no longer be accessed.</p>
	Notification	The Bell icon lists active messages and notifications. Select each from the dropdown to read and resolve it.
	History	Allows you to quickly access the last screens or clients within a logged in session. Use to view all the pages you have accessed in this session in the sequence accessed. Click the tool to return to a specific page. <ol style="list-style-type: none"> 1. It will also list client records that have been opened within a logged in session. 2. When you log out of the session, your history will be erased. 3. The history window displays the last 13 QuickLinks and/or clients you have accessed in your current SmartCare session.
	Logout	Displayed on the Title bar. Click the icon when you are ready to sign off and close your session in SC.

Icon	Name	Description
	Help	<p>Displayed on all SC pages. Use this to display help on the specific SC module.</p> <p>NOTE: Not all Help sections contain current SC application information and currently does not contain ACBH work processes.</p>
	Validate	<p>After completing a section, you can hit the validate button and the system will specifically highlight what fields are required, that you might not have chosen or any issues that it is finding while it is validating.</p> <p>The validation button in SmartCare serves as a helpful tool to ensure that all necessary data is provided and that any errors or discrepancies are identified.</p> <p>NOTE: SmartCare currently does not indicate what fields are required with an asterisk (*). Until this is implemented, use this feature to identify required fields.</p>

**Based off of the R6 Navigation User Guide*

3. Use of Documents Within SmartCare

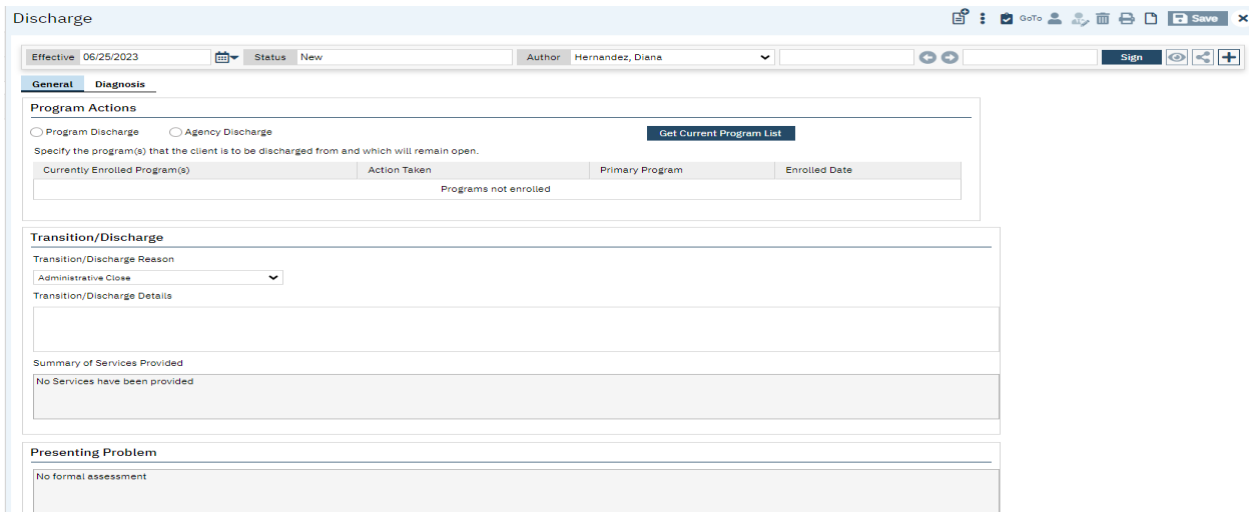
Documents

Information is not entered through dashboards or list pages, instead most information is entered into SmartCare by use of documents and detail pages. Documents are individual iterations of a template, and many List Pages are lists of Documents.

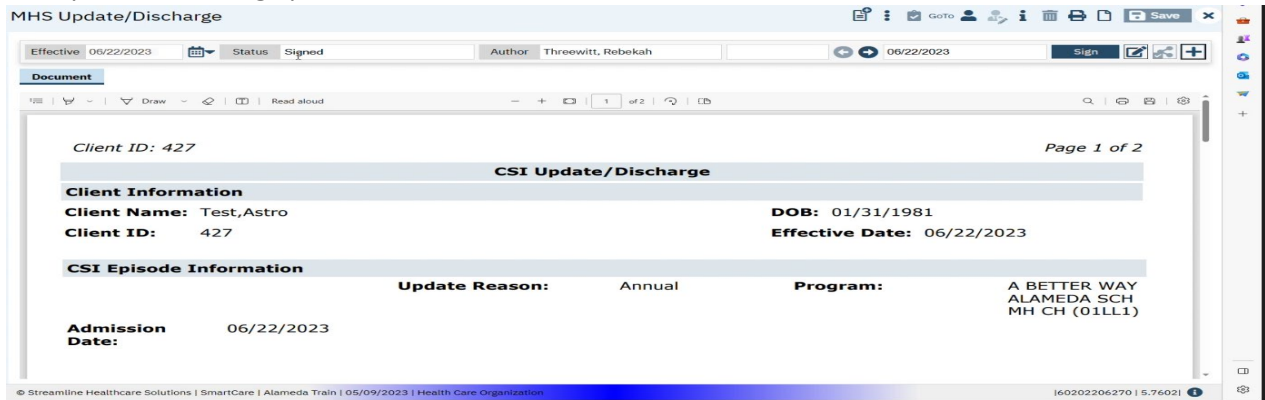


SmartCare Documents are pages that allow you to enter data into specific fields and you have the ability to save the overall document to its associated client or to a system record. Most Documents are informational – they record MHS Registration, Program Enrollment, Admissions, Discharges, and Annual data. You cannot bill Services from Documents alone, and a MHS Program Enrollment is required to complete Service Entry.

Use of documents allows information to be pulled for Reporting, State Reporting, etc. and used for initializations, or checked against validations. This is an example of a Discharge Document:

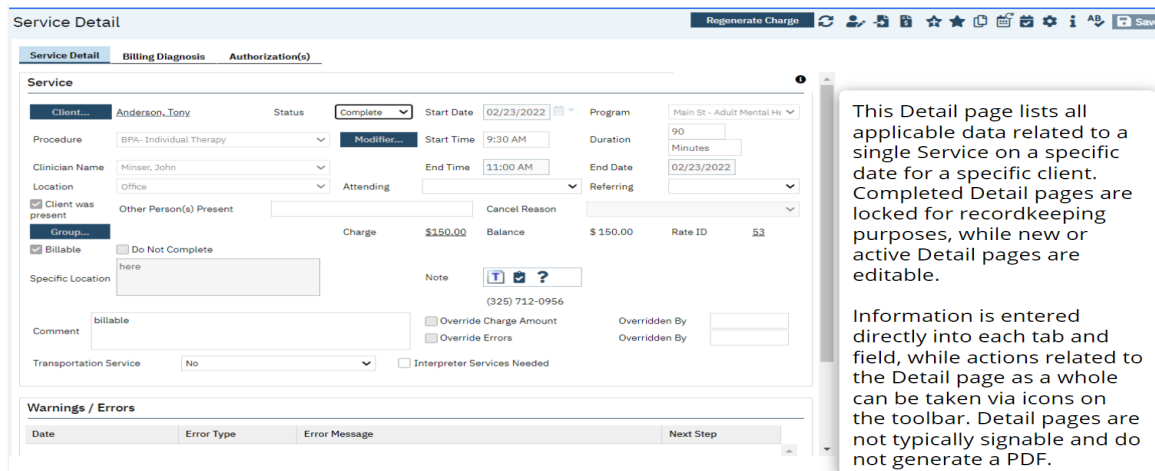


Example of a Discharge pdf.



Detail Pages

Detail pages are specific to certain types of data entry, they are not typically signable and do not generate pdf. They contain a great deal of information about a specific action, event, or record, e.g. Service Entry.



Completed documents and detail page entries will be accessible through the appropriate list page.

Client Records

The Client Record contains client information, entered into SmartCare concerning a client. The Client Search feature allows you to search from a pool of clients and select a client record or create a new record. Having a Client Record selected does a number of things in the system: it allows you to take actions that impacts registration, it allows you to run reports on the client, and it configures all client data-focused Widgets to display information on that Client via the Client Dashboard.

Scan and Upload Documents

Smartcare has the ability to scan and upload documents and it is currently under construction. This functionality will enable users to upload and scan various medical documents such as Medi-Cal cards, Authorization documentation, Driver's Licenses, and much more.



4. Client Search

Before you can work with any client information in SmartCare, the client must have a SmartCare Client ID. If a client is new to your program, you must determine whether the client has a Client ID in SmartCare, by using the Client search screen, described below. If you cannot find an assigned Client ID, a new Client ID is needed, see Chapter 5 for instructions.

NOTE: It is possible that a client could have multiple last names, multiple first names and aliases, etc. To prevent creating a duplicate client and before registering a new client be sure you have tried all possible spellings of the client's name and aliases.

[Preventing Duplicate Client Registration](#)

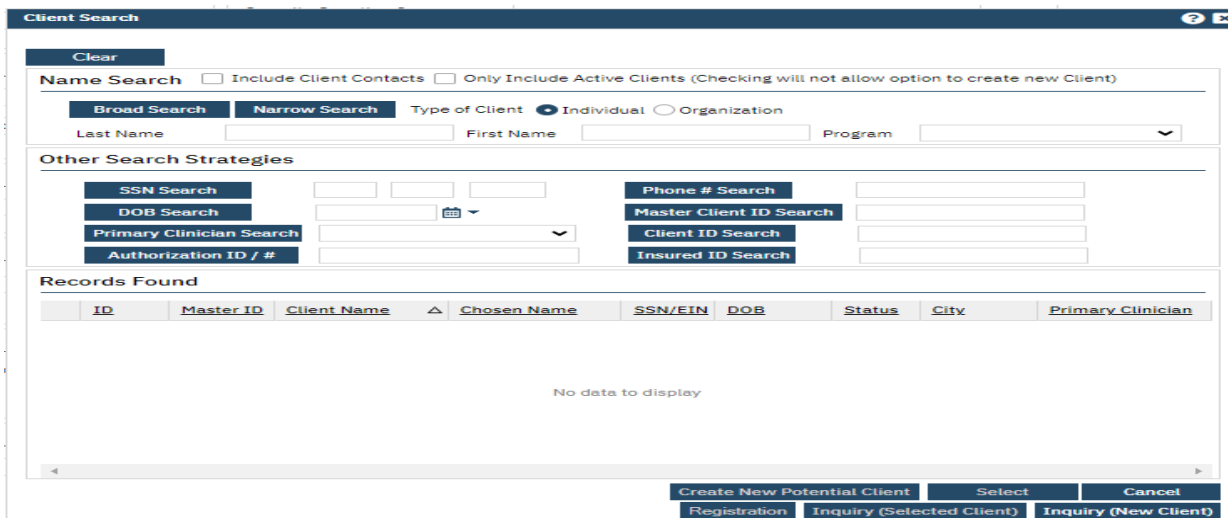
- If there is a Social Security Number (SSN) in the system that is the same as the SSN you are searching for, the system displays an error message and does not let you continue.
 - You **cannot** override a Social Security Number match.
 - If you are sure that the SSN you entered is correct refer to your supervisor.
- If there is a client in the system with the same name and same birth date you are searching for, the system displays an error message and does not let you continue.
 - If two different clients have the exact same name and same birth date they may be duplicate clients refer to your supervisor.

[Begin Client Search](#)

1. Click on the Client Icon at the top of the SmartCare window to activate the client search option:



2. Click on the <Client Search> button to activate the Client Search screen as shown below:

A screenshot of the 'Client Search' screen. The screen has a title bar 'Client Search' with a help icon and a close icon. Below the title bar, there is a 'Clear' button. The main area is divided into sections: 'Name Search' with checkboxes for 'Include Client Contacts' and 'Only Include Active Clients (Checking will not allow option to create new Client)'; 'Broad Search' and 'Narrow Search' buttons; 'Type of Client' with radio buttons for 'Individual' (selected) and 'Organization'; and input fields for 'Last Name', 'First Name', and 'Program'. Below this is the 'Other Search Strategies' section with buttons for 'SSN Search', 'DOB Search', 'Primary Clinician Search', 'Authorization ID / #', 'Phone # Search', 'Master Client ID Search', 'Client ID Search', and 'Insured ID Search', each followed by an input field. At the bottom, there is a 'Records Found' section with a table header: 'ID', 'Master ID', 'Client Name', 'Chosen Name', 'SSN/EIN', 'DOB', 'Status', 'City', and 'Primary Clinician'. The table body is empty, displaying 'No data to display'. At the very bottom, there are buttons for 'Create New Potential Client Registration', 'Select Inquiry (Selected Client)', and 'Cancel Inquiry (New Client)'.

NOTE: SmartCare allows for multiple search options, as well as the Client Name from the Client Search screen.

Client Search Field Definitions

- **Client Name:**
- **Social Security Number:** The Social Security Number is the fastest way to find the client. If you have the client’s SSN (not all 9’s), enter the SSN in the SSN Search field, and click the SSN Search button.
- **DOB:**
- **Master Client ID Search:**
- **Client ID Search:**
- **Insured ID Search:**

Name Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client Individual Organization

Last Name First Name Program

Other Search Strategies

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

3. Enter the client SSN. **NOTE:** When SSN is unknown, enter all 9’s.
4. Click the “SSN Search” button
5. Enter the client’s last name and first name and Click the “Broad Search” button
(**NOTE:** There is a minimum of 3 characters required to search) **Broad Search**

If the client’s name search results in No Search Records Found

6. Enter the client’s SSN and click the SSN Search button **SSN Search**

If the client name search and the SSN search results in No Search Records Found

7. Enter the client’s DOB and click the DOB Search button **DOB Search**

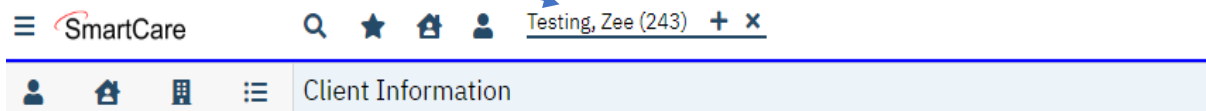
These three combinations will most likely provide results – the search results are found on the Records Found section of the Client Search screen:

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
243	243	Testing, Zee		9999	01/01/19...	Active	Oakland	

- Carefully review the Records Found results to determine if the client you are searching for is listed, once you find your client select your client using the radio button as shown above and click on the Select button



- Your client will now appear at the top of the SmartCare window next to the Client Icon by client name and client ID



5. Create a new Client ID

Before registering a new client, be **100%** sure you have tried all possible spellings of the client's name and client's alias names to prevent creating a duplicate Client ID. If you cannot find a client using the Client Search Screen, you must activate the **Create New Potential Client** option to generate a Client ID before you can start the Mental Health Services Registration document to Enroll/Admit the client to a Program before entering Services.

NOTE: Follow the ACBH Client Registration & Client Naming Convention Rules below to generate a new Client ID, the Rules can also be found in Appendix.

Client Registration Rules & How to Ask the Right Questions:

- 1) *What is your name on your CA ID/ID or DL? (Field Name: **First Name, Middle name & Last name.**)*
- 2) *What is your preferred name? (Field Name: **Aliases - Preferred Name; First, Middle & Last.**)*
- 3) *What is your Gender Identity? (Field Name: **Gender Identity**) NOTE: Multiple selections will be available at a future date.*
- 4) *What is your sex of record on your Medi-Cal account (M/F/U)? (Field Name: **Sex**, one selection allowed of M/F/U. If client does not know-select U.)*
- 5) *What is your Sexual Orientation? (Field Name: **Sexual Orientation**, multiple selections allowed.)*
- 6) *What are your Pronouns? (Field Name: **Preferred Pronoun**, multiple selections allowed.)*
- 7) *What is your Date of Birth listed on your CA ID/DL or on your birth certificate? (Field Name: **Date of Birth**)*

NOTE: *If clients name and/or DOB are unknown or unable to obtain:*

- **all will be listed consistently as: Jane or John Doe with DOB 1/1/1900.**
- *All other fields above are listed as unknown if client does not answer the questions.*

Client Naming Convention Rules

Because the information entered in the Client Registration screen establishes the client's identity, it is best to ask the client for a form of ID (CA ID, DL, SSN Card or other document) to be used for entering the client demographic data. Three critical pieces of information must be entered correctly: **client name, birth date, and Social Security Number.**

Client Last Name:

- Enter a last name as listed on the CA ID/ID, SSN Card or DL
 - Leave out apostrophes and blank spaces
 - "O'Connor" should be typed "OConnor"
 - "Torres-Smith" should be typed "Torres-Smith"
 - DO NOT enter Jr., Sr., etc. in the Last Name field, these are to be entered in the **Suffix** field
 - DO NOT enter spaces in front of name

Client First Name:

- Enter a first name as listed on the CA ID/ID, SSN Card or DL
 - Leave out apostrophes and blank spaces

- DO NOT enter spaces in front of the name

Client Middle Name (optional):

- Enter a middle name as listed on the CA ID/ID, SSN Care or DL
 - Leave out apostrophes, dashes and blank spaces
 - DO NOT enter spaces in front of name

Client Suffix:

- Enter the client suffix title that is part of the client's name, such as Jr., Sr., or the Roman Numerals II, III, etc.

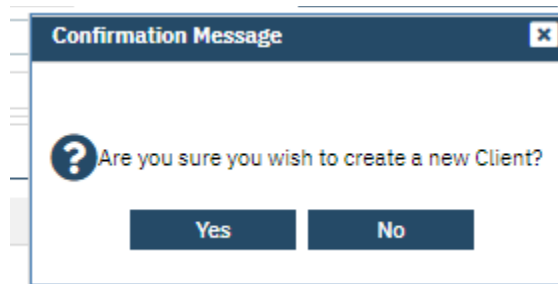
NOTE: SmartCare requires three (3) basic searches before the system will activate the **Create New Potential Client** option button to create a new Client ID.

- Broad Search
- SSN Search
- DOB Search

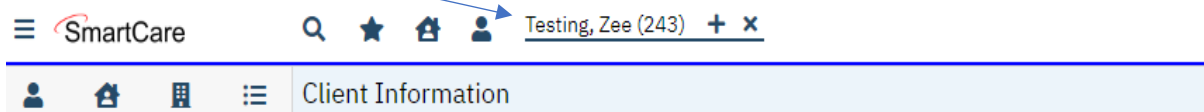
ENTER BASICALLY THE SAME INFORMATION AS USED FOR CLIENT SEARCH - MODIFY AS NEEDED

A rectangular button with a dark blue background and white text that reads "Create New Potential Client".

Click Yes when asked to confirm you want to make a new Client.



The new Client ID will appear on the top of the SmartCare screen next to the Client Icon



Once you have created the new Client ID, if the client has an alias use the Alias Tab to enter the alias information.

Client Alias Name

The purpose of gathering alias information is to provide an additional means of searching for a person's name. By including aliases or alternate names that an individual may be known by, the search capabilities of the system are enhanced. This allows for a more comprehensive and accurate retrieval of information when conducting searches or generating reports.

In many cases, individuals may have multiple names they are known by, such as nicknames, maiden names, or previous legal names. By capturing and storing this alias information within SmartCare, the system can broaden its search parameters and increase the likelihood of finding relevant records associated with the client.

Enter this information when registering a client.

1. If the client has ever used an alias, enter them under the "Alias Tab". You may enter as many aliases as needed via the Client Information Screen.

The screenshot shows the 'Client Information' screen with the 'Aliases' tab selected. The form contains the following fields: 'First Name', 'Middle Name', 'Last Name', and 'Type'. There is a checked 'Allow Search' checkbox and an unchecked 'Chosen Name' checkbox. Below the form is a table titled 'List of Alias' with columns: 'First Name', 'Last Name', 'Middle Name', 'Type', 'Allow Search', and 'Chosen Name'. The table is currently empty, displaying 'No data to display'.

2. Enter Alias information, e.g. First name, Last Name.
3. Assign "Alias Type" by selecting Dropdown Menu

This close-up shows the 'Type' dropdown menu. The selected option is 'Preferred Name'. The dropdown list includes: 'Preferred Name', 'Nick Name', 'Previous Name', 'Real Name', 'Former Name', 'Alias', and 'Preferred Name'. The 'Alias' option is currently highlighted. To the right of the dropdown is a checked checkbox.

4. "Allow Search" box is auto populated with a checkbox, which enables the search criteria.
5. If the Alias is what they would like to use as their primary name, please click the "Chosen Name" checkbox.
6. Select "Insert" and then "Save". If you don't save it, it will appear in your suitcase or can be lost.
7. Once an Alias is generated and inserted to a client record the Alias will appear on the "List of Alias" table and will appear in searches if you select the allow search box.

Client Information

General **Aliases** Demographics Hospitalization Primary care referral Financial Release of Information Log Contacts

Client Episodes Referral Family External Referral Custom Fields

Client Alias

First Name Middle Name Last Name

Type Allow Search Chosen Name

List of Alias

	First Name	Last Name	Middle Name	Type	Allow Search	Chosen Name
X <input type="radio"/>	Olive	Testing	M	Nick Name	Yes	No
X <input type="radio"/>	Oliver	Tester		Alias	Yes	No
X <input type="radio"/>	Peter	Friendship		Alias	Yes	Yes

→ The above shows a list of the aliases for this client.

[Contacts Tab - Client Information Screen](#)

This tab is used to add records indicating additional individuals that are important to the client's care. When you navigate to the tab the first time, the "List of Contacts" grid is empty if there are not already any contacts listed in the client's record.

The Registration form must be saved before you are able to add a new contact.

NOTE: Saving the form is different from signing, as saving does not require all validations to be fulfilled.

Client Information Contacts Tab Required Fields:

- Relation (Required): Select the relationship the contact has with the client.
- First Name (Required): Enter the contact's first name.
- Last Name (Required): Enter the contact's last name.

6. Program Assignments

Program Assignments List Page

Program assignments list page is used to see the status of enrollment and discharge of all the clients across the organization. New program enrollment will also be done by clicking new paper icon. Before you can enter services for a client, there must be an open Program Enrollment for the client in the Program.

Priority	Client Name	Status	Date Requested	Date Enrolled	Date Discharged	Program	Primary	Primary Clinician
123456	Hawkins, Tramaine (2...	Discharg...	05/01/2023		05/17/2023	CONREP MHS...	No	Fortune, Mar...
	Jefferson, Jim (443)	Discharg...		06/23/2023	06/23/2023	A BETTER WA...	No	
	Libre, Nacho (358)	Discharg...			06/23/2023	JOHN MUIR B...	No	
	Test, Betty Boop (421)	Discharg...		06/20/2023	06/23/2023	A BETTER WA...	No	
	Test, Beverly (460)	Discharg...		06/23/2023	06/23/2023	ALAMEDA HL...	No	
	Test, Beverly (460)	Discharg...			06/23/2023	A BETTER WA...	No	
	Test, Chandler (429)	Discharg...		06/22/2023	06/22/2023	ALAMEDA HL...	No	
	Test, Dan (472)	Discharg...		06/23/2023	06/23/2023	A BETTER WA...	No	
	Test, danny (436)	Discharg...	06/23/2023		06/23/2023	EBAC ALAME...	No	Test, Test1
	Test, danny (436)	Discharg...		06/23/2023	06/23/2023	A BETTER WA...	No	Test, Test1

Program Assignment Details

Program Assignment | Additional Information | Custom Fields

General

Program Name: AFGHAN COALITION UELP CHLD ADL (01F41) Primary **Current Status**: Enrolled

Client: Test17, Anjali

Assigned Staff: [Dropdown]

Comment: [Text Area]

Requested Date: [Calendar]

Enrolled Date: 07/13/2023

Discharged Date: [Calendar]

Next Schedule Service: [Text]

Program Assignment Details Required Fields for the program enrollment:

- Program Name (Required): Select a program that a client is enrolled.
- Current Status (Required): Select the status of enrolled.

- Enrolled Date (Required): Select the enrolled date.

7. PEI/UERP Data (Client)

PEI/UERP Data

PEI/UERP data screen is used to capture the demographics information. Please select the information that are needed to complete the PEI/UERP workflow.

The screenshot shows the PEI/UERP Data form with the following fields and values:

- Effective:** 06/28/2023
- Status:** New
- Author:** Shahi, Anjali
- Program:** ADULT FORENSIC BEHAVIORAL HLTH (81142)
- Race:** American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Another Race not listed, Unknown
- Ethnicity:** Caribbean, Central American, Mexican/Mexican American/Chicano, Puerto Rican
- Primary Language:** English
- Gender Identity:** Female
- Sexual Orientation:** Unknown
- Disability Status:** Unknown, None, Declined to answer, Vision, Hearing/Speech, Cognitive, Chronic health condition, Physical/mobility

PEI/UERP data fields to capture the demographics information:

- Effective date: This date will default to current date and the user can edit it if needed.
- Status: Document status will default to new, and the status will change to signed at the completion of the document.
- Save: Save button will save the document.
- Author: Author will always be a logged in user.
- Program: Select a program that a client is enrolled.
- Race: Select all the races that apply to a client.
- Ethnicity: Select the ethnicities that apply to a client.
- Primary Language: Select a primary language for a client.
- Gender Identity: Select gender identity from the dropdown.
- Sexual Orientation: Select sexual orientation from the dropdown.
- Disability Status: Select disability statuses if needed.

8. Program Assignments

Program Assignment Details

The user will discharge the enrolled client from the program assignment details screen.

The screenshot shows a web application window titled "Program Assignment Details". The window has a top navigation bar with a "Save" button and a close button. Below the navigation bar, there are three tabs: "Program Assignment", "Additional Information", and "Custom Fields". The "Program Assignment" tab is active. The form is divided into a "General" section. The "General" section contains the following fields:

- Program Name:** A dropdown menu with the value "AFGHAN COALITION UELP CHLD ADL (03F41)".
- Primary:** A checkbox that is checked.
- Current Status:** A dropdown menu with the value "Discharged".
- Client...:** A text input field with the value "Test17, Anjali".
- Discharge Reason:** A dropdown menu with the value "Mutual Agreement/Treatme".
- Assigned Staff:** A dropdown menu with the value "Shahi, Anjali".
- Requested Date:** A date input field with a calendar icon.
- Enrolled Date:** A date input field with the value "07/13/2023" and a calendar icon.
- Discharged Date:** A date input field with the value "07/13/2023" and a calendar icon.
- Comment:** A large text area.
- Next Schedule Service:** A text input field.

Program Assignment Details Required Fields for the discharge:

- **Program Name (Required):** Program name will default for the discharge from the program enrollment.
- **Current Status (Required):** Select Discharged status.
- **Discharge Reason (Required):** Select a discharge reason.
- **Discharged Date (Required):** Select a discharged date.