ALAMEDA COUNTY

BEHAVIORAL HEALTH

SUD

SMARTCARE

SUD CALL PORTALS & NON-CALOMS PROGRAMS

MINI MANUAL

V1

ACBH – Information Systems

Help Desk Phone #: (510) 567-8181

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Billing and Benefits Support:

(800) 878-1313

ACBH Provider's Website:

https://www.acbhcs.org/providers

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SUD Non-State Reporting and Portal Provider End User Training Objectives

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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. _____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. _____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. _____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.

______________________	______________________	__________
User Signature	User Printed Name	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.

______________________	______________________	__________
Supervisor Signature	Supervisor Printed Name	Date

18 PHI Identifiers Under HIPAA

1. Names
2. Geographic subdivisions smaller than a state, Geocodes (e.g.-> zip, county, or city codes; street address, 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.

SUD Call Portal and Non-CalOMS Programs SmartCare Workflow:

SUD Call Portals and Non-CalOMS Programs do not require the CalOMS Treatment information collected at admission to treatment and at discharge from treatment. The Call Portals and Non-CalOMs programs will complete client information using the Client Information screen in SmartCare to capture client general and identifying demographic information. Program enrollment and discharge information will be used to capture the treatment period using the Program Assignment details screen.

Chapter 1. Portal & SmartCare Log In

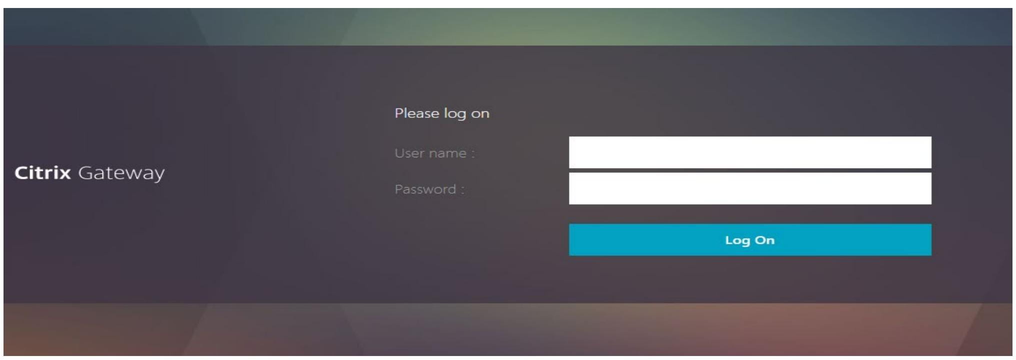
Logging onto the ACBH Web Portal

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

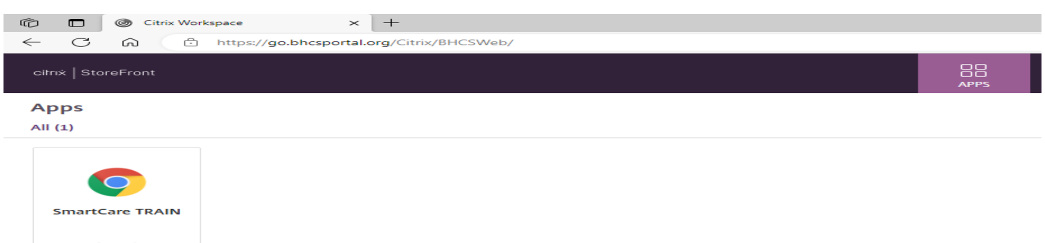
- ACBH Staff will use the URL to open SmartCare once you log on to the County Secure Network.
- CBO Agencies will use the ACBH Web Portal to access SmartCare.

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.

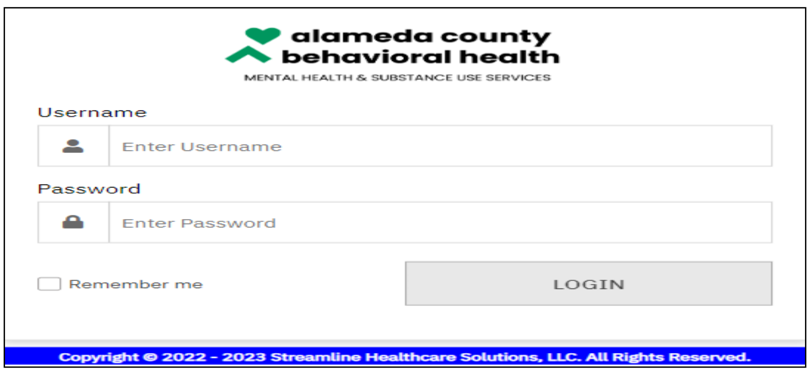
6. Click the SmartCare icon to prompt a new Microsoft Edge Window to open the SmartCare Log on Screen.

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.

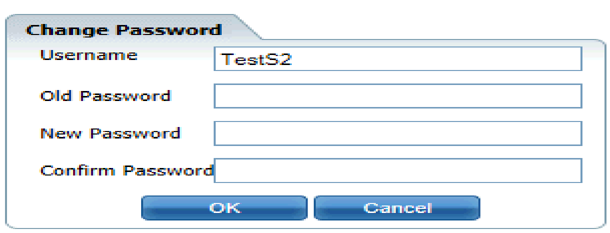
2. Click the LOGIN button.



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

4. Click the **OK** button.

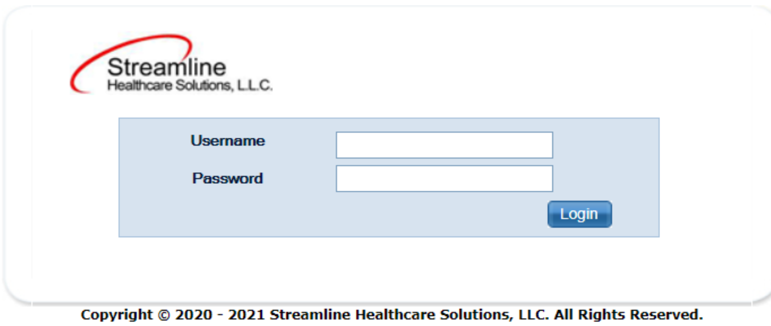
5. You will then be taken to this screen:



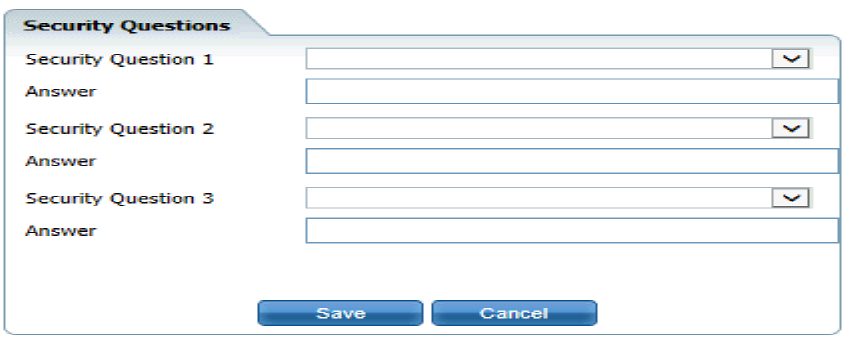
6. Enter your existing temporary password in the Old Password field.
7. Enter a new password in the New Password field.

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.



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

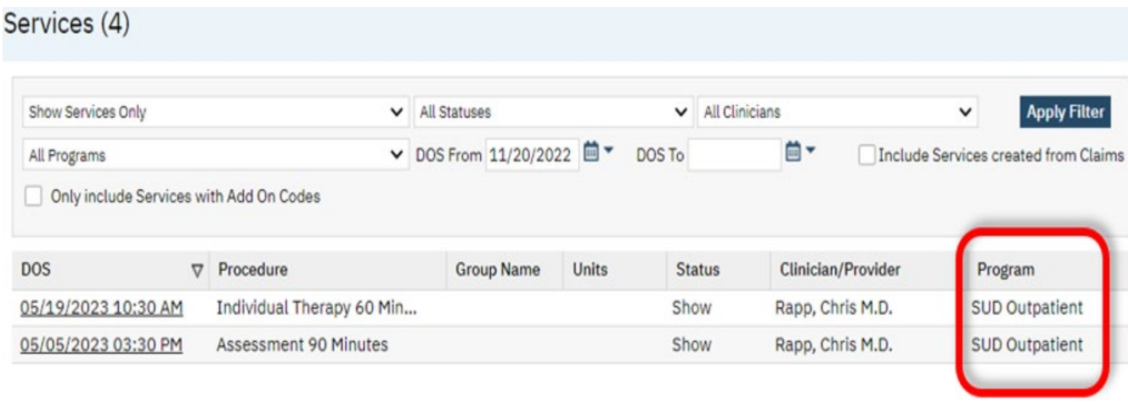
If you have logged on previously, the logon will take you directly to one of the security questions you have selected. Supply the answer and select the “Remember Me” radio button, then click the Submit button.

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.



Chapter 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.

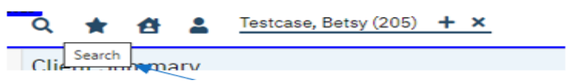
Overview

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.

-or-



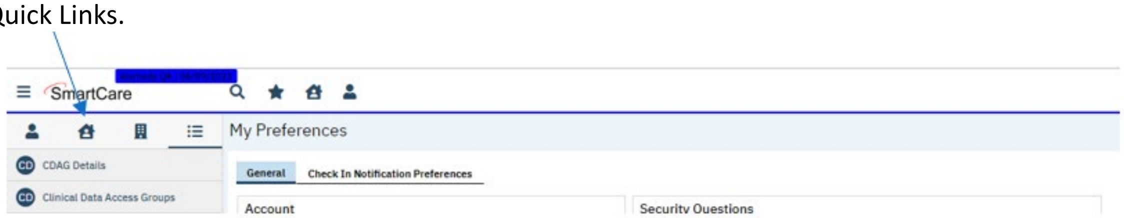
TIP: Hover over a specific tool to display its name.

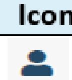
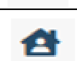
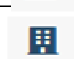
Sometimes the Toolbars are too large for the size of your screen, so if you hover your arrow to the far right of the screen, other tools will appear.

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

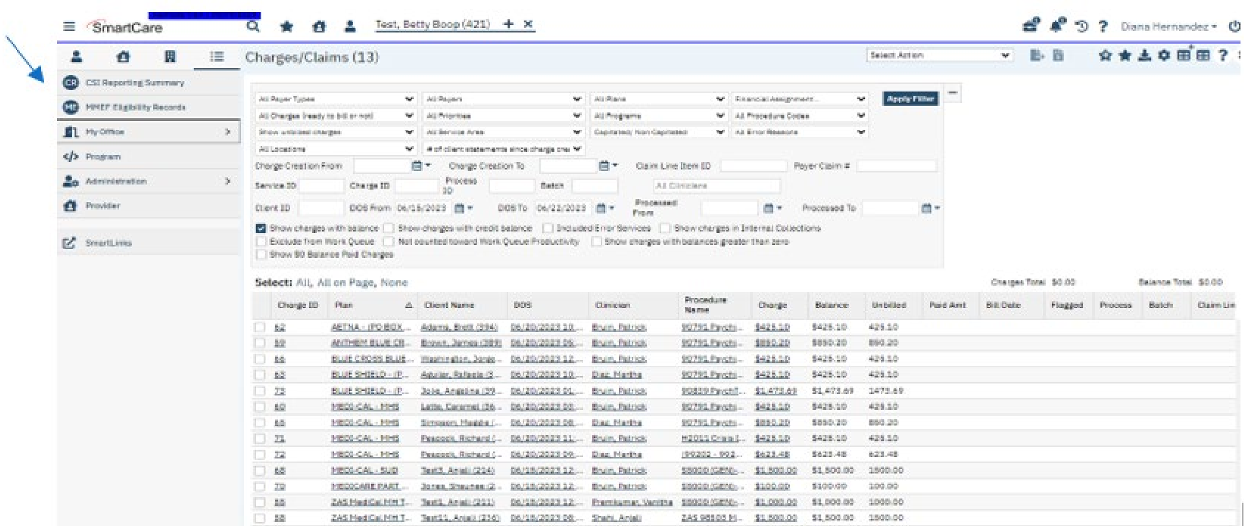
TIP: By clicking on SmartCare Icon you land back on your homepage. SmartCare

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:



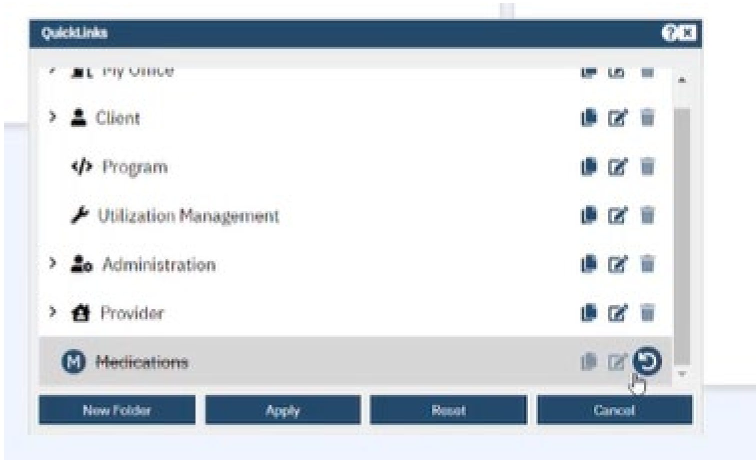
You can build and tailor these "Quick Links" to allow you to efficiently navigate between the different aspects of your job, without having to type in what you are looking for. To access and manage your "Manage QuickLinks" feature:

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.

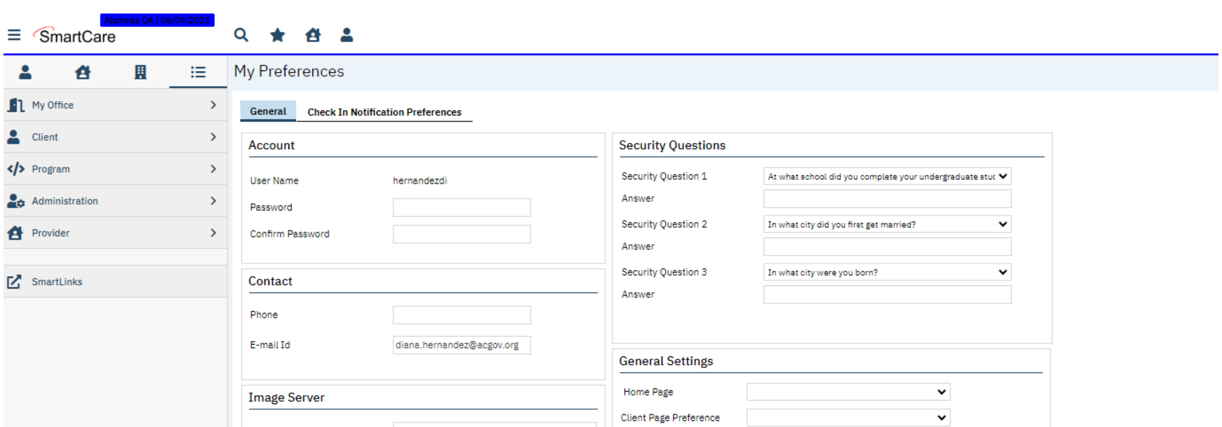
You can use this section to Reorder, Delete or Edit the Quick Links displayed names.



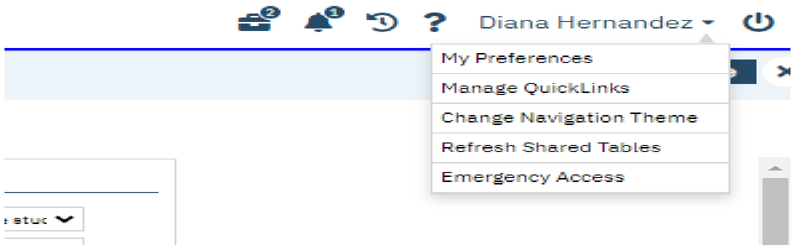
NOTE: Users may have core functions linked to specific screens, so please work with your organization to determine what the standards should be.

#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.

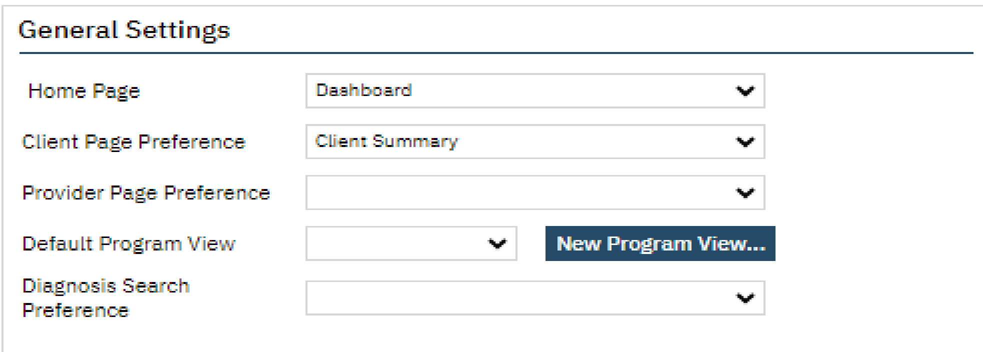


If this is not the first screen you see, navigate to the “My Preferences” screen by clicking the drop list arrow next to your name in the top right corner of the screen, and select “My Preferences” button.



General Setting Section

In the General Settings section set the following settings:



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.

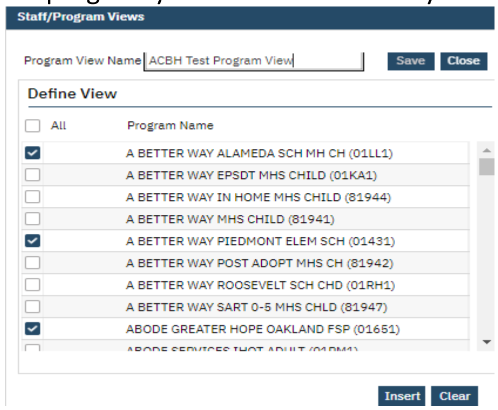
   Generally, this is set to view 'Dashboard' as shown in the screenshot above. After making your selection, click the Save button located under your login name in the top right corner. (IMPORTANT: Be sure to perform a "Save" following any changes while logged into your account).
   NOTE: If a Home Page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

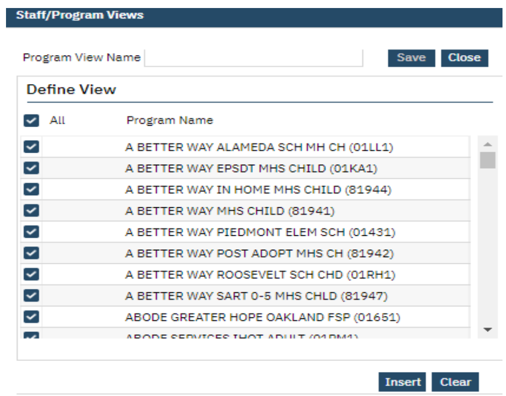
4. **Default Program View:** Setting a Program View lets you define the programs that you can filter for while using the Program Assignments page. The Program View you set up are displayed in the All Program Views dropdown list on the Filter portion of the Program Assignments page on the Program tab.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



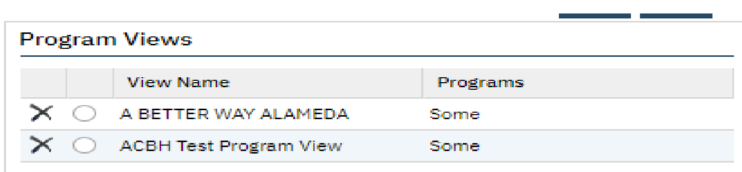
-or-

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



Click the **Insert** button.

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



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

-or-

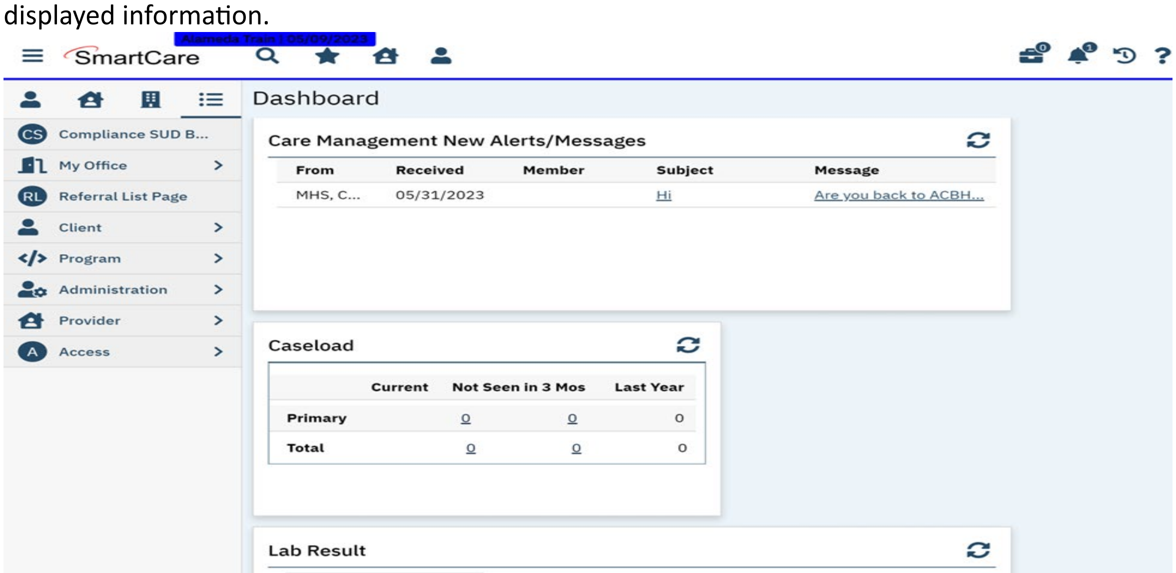
If you are finished setting up a Program View, click the Save button.
You will now be able to select your custom view from the Default Program View drop list.

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

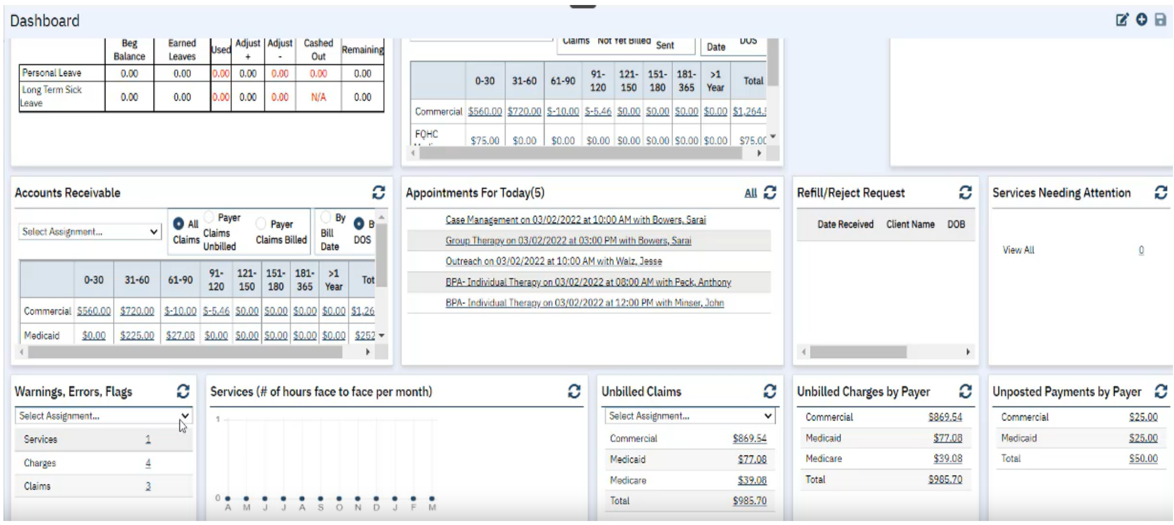
#3: Dashboards

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.



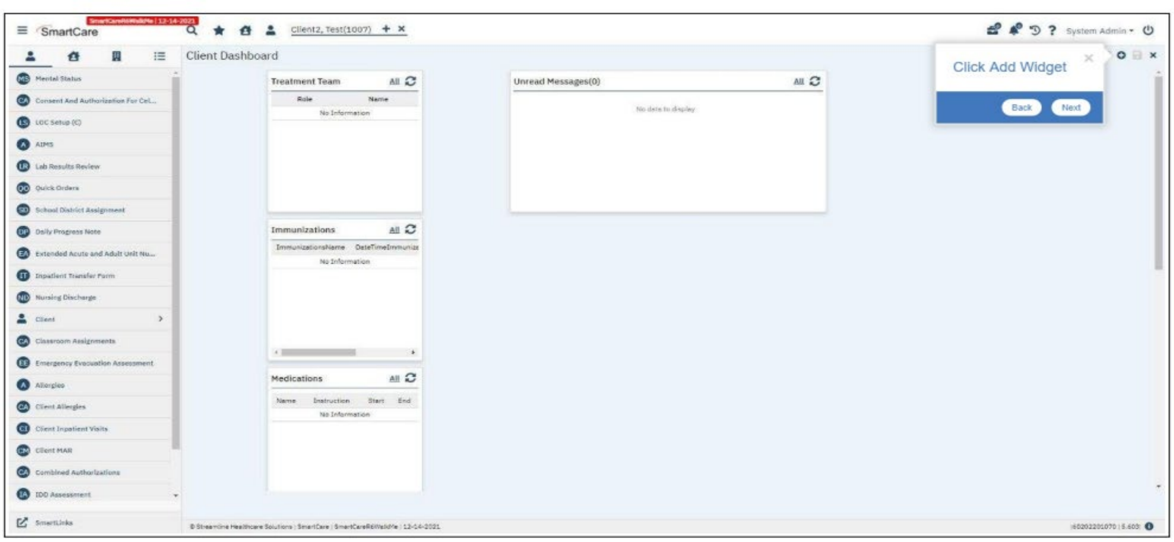
In addition, there are specialized Dashboards, e.g. Billing Dashboard, Provider Dashboard, etc. that can be updated with widgets specific to you. You can select which screen is displayed when you sign on and these dashboards can be tailored to meet your specific needs.

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.

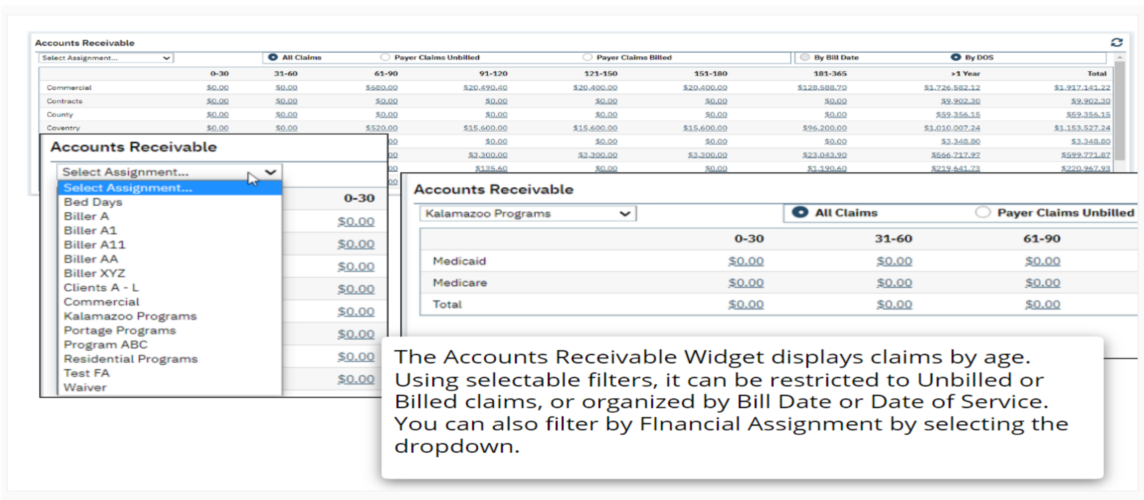
Each tile on the Dashboard is a widget, that you can resize and edit the display. Widgets are part of the core functionality of SmartCare, and are displayed on the staff's dashboard. You tailor the dashboard through the use of widgets.



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()refresh the widget. The data in the widget is refreshed/recalculated based upon the value set in the Auto Refresh Interval setting.



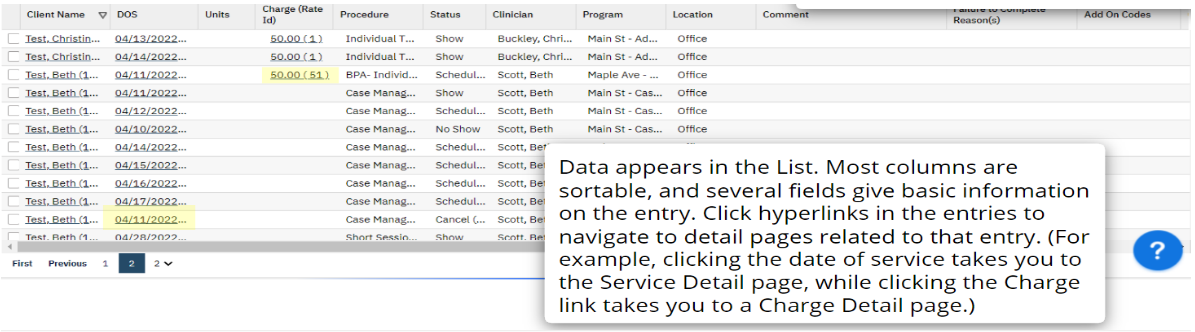
The "Warnings, Errors, Flags Widget" displays the total number of Services, Charges and Claims that have a system issue and need to be corrected. Like other Billing Widgets, the Warnings, Errors, Flags Widget can be filtered by financial assignments.

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.



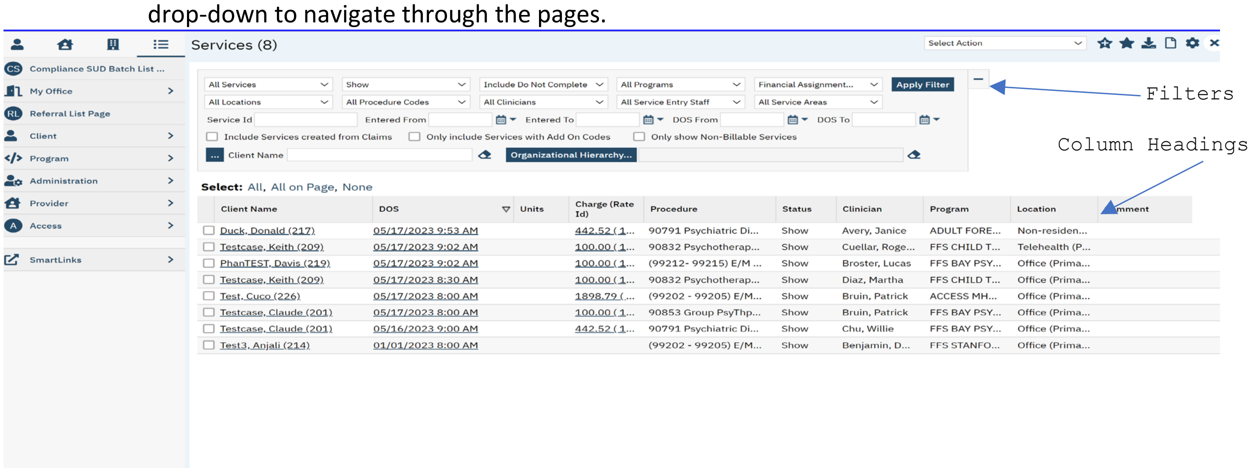
They are also able to be 'Favorited', which allows you to set commonly-used Filters and immediately apply them.

- 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.

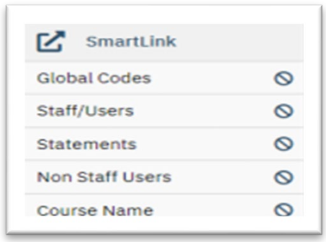
2. Click on the column headings to sort the list by the selected column.
   - Click the same column heading again to reverse the order of the list based on the selected column.

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.



#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.

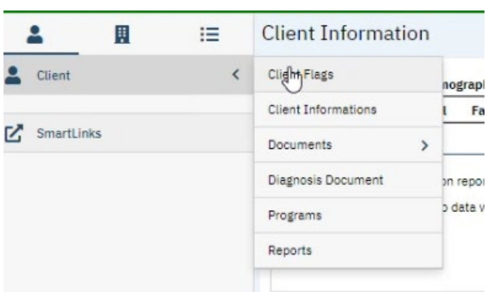


To help minimize the number of clicks required to get to the screens you frequently use, SmartCare creates SmartLinks to screens, reports, actions, or favorites that you visit regularly. The links in the SmartLinks section change over time depending on your system usage.

#7: Client Flags

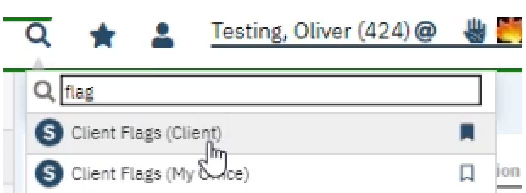
Flags are icons used throughout the SC system to point out or mark important information about a client. Permissions can be set on a flag to allow or limit staff from viewing a client's flag(s). To use flags in SmartCare, you can access "Client Flags" in two ways:

Go to Client and choose the Client Flags Option.



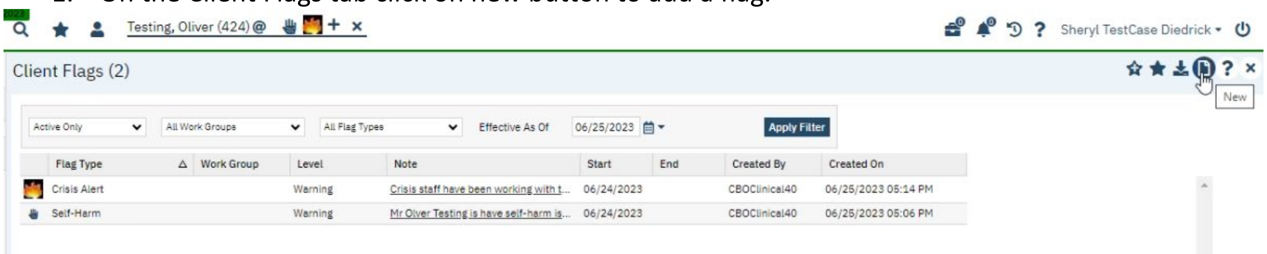
-or-

Complete a search, by typing in "flag":

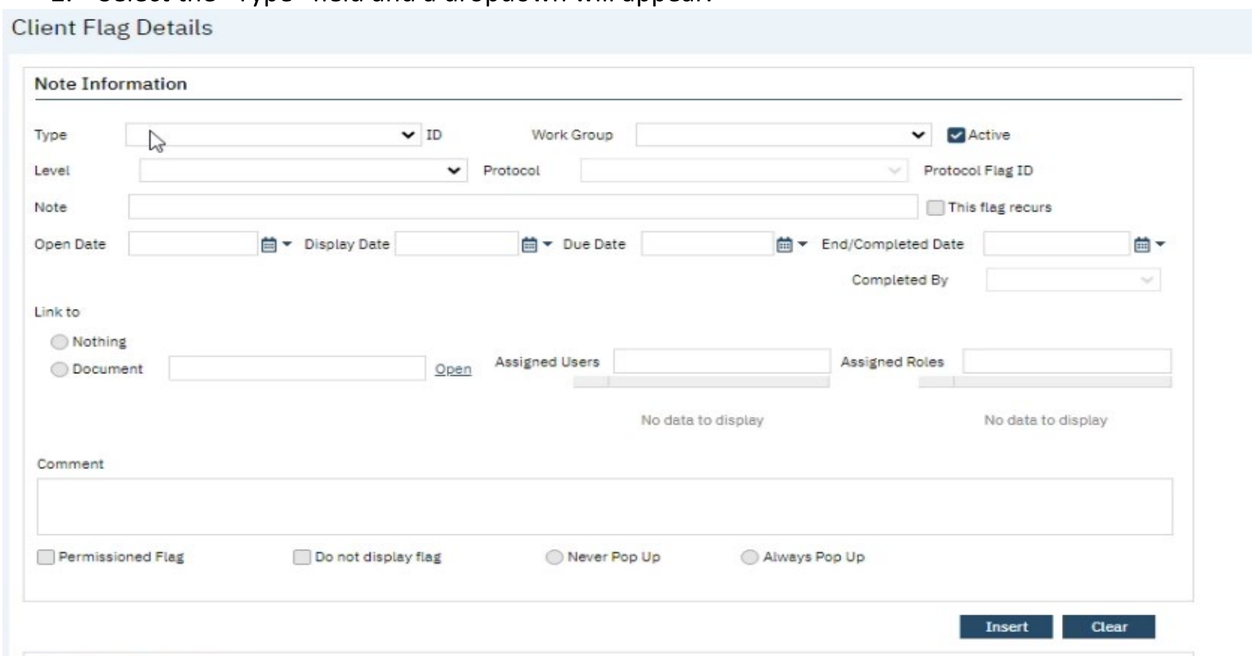


In SmartCare, an event is referred to as a “flag”. Each flag will have a due date that can then be tracked and, as the due date nears, can be completed.

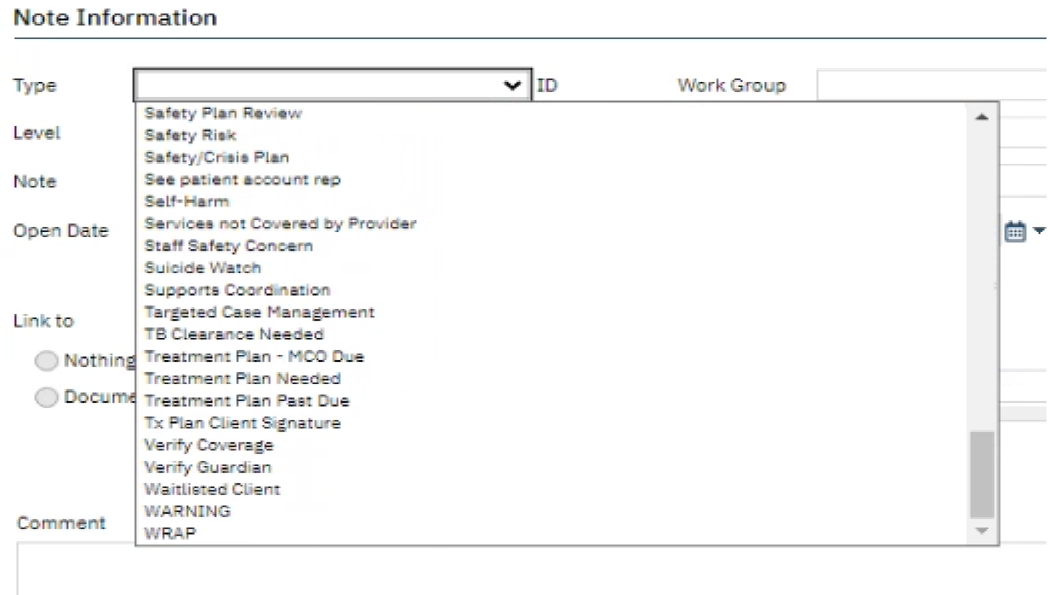
1. On the Client Flags tab click on new button to add a flag.



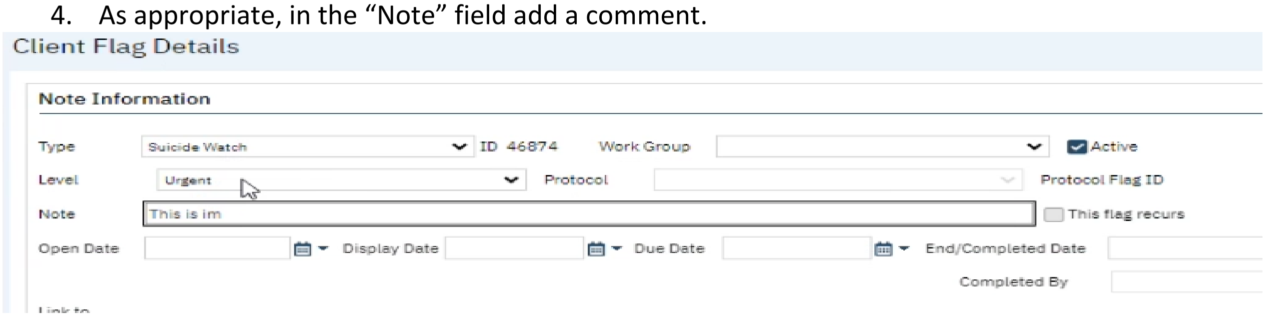
2. Select the “Type” field and a dropdown will appear.



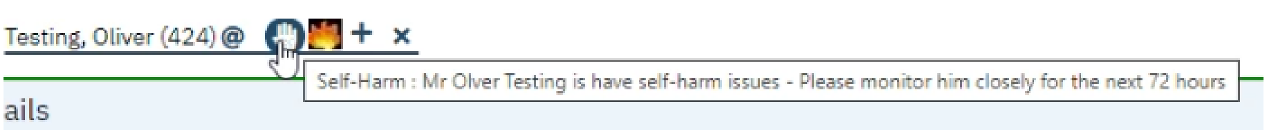
3. Select the type of flag that you would like to add to the client’s records.



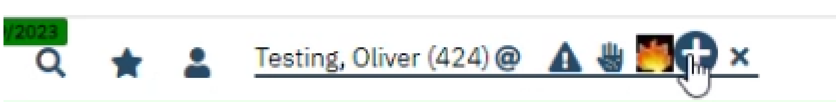
4. As appropriate, in the “Note” field add a comment.



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

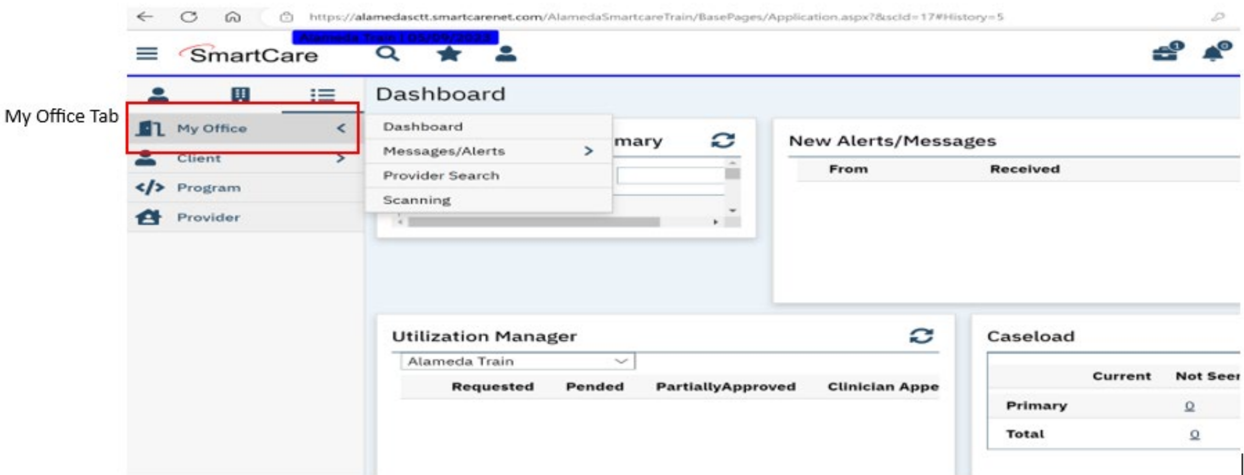


TIP: You can click on the add button to add additional flags.



My Office Tab

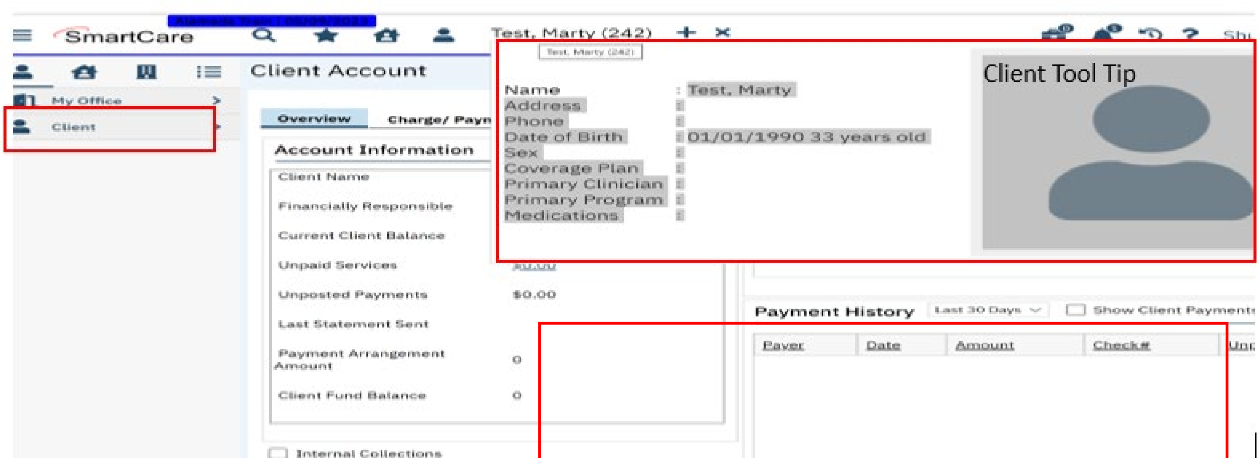
My Office Tab contains overall information on all client's records assigned to you based on your security permissions; different roles may view different information.



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	**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 able to retrieve what you delete.
AB	**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. ▪ Filters are specific to a user. ▪ 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. ▪ 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. ▪ This is meant to be used with services.

Icon	Name	Description
	**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. ▪ This can only be used with Scheduled services.
	**Messaging**	Allows you to send a message and automatically attach client document to message. ▪ Utilized with Documents.
	**Unsaved Changes Briefcase**	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. 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 **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.
	**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. 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.
	**Help**	Displayed on all SC pages. Use this to display help on the specific SC module. **NOTE:** Not all Help sections contain current SC application information and currently does not contain ACBH work processes.

Icon	Name	Description
	**Validate**	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. 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. **NOTE:** SmartCare currently does not indicate what fields are required with an asterisk (*). Until this is implemented, use this feature to identify required fields.

**Based off of the R6 Navigation User Guide*

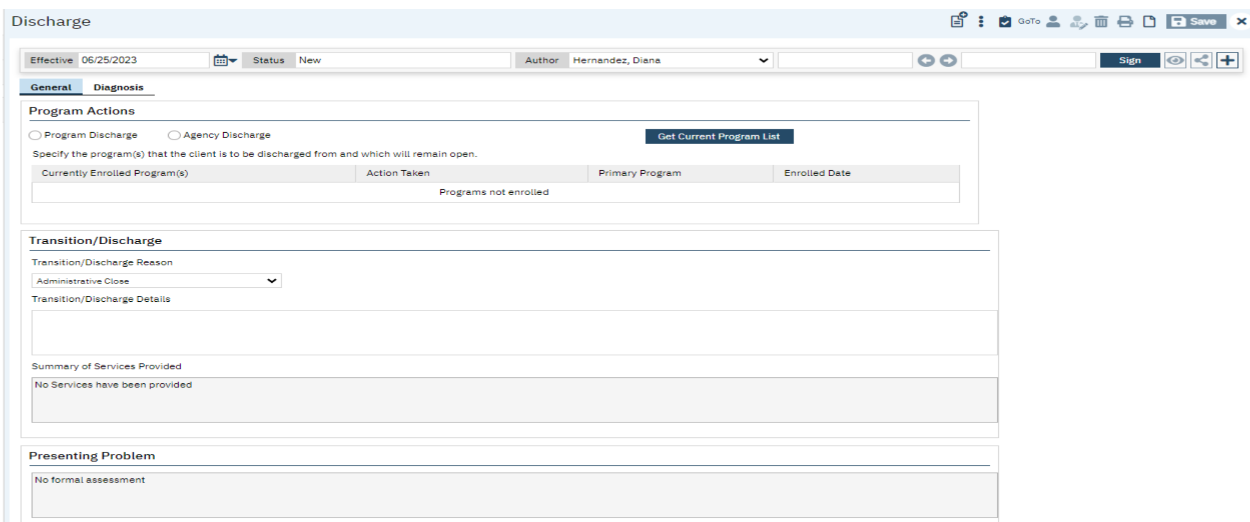
Chapter 3. Use of Documents Within SmartCare

Documents

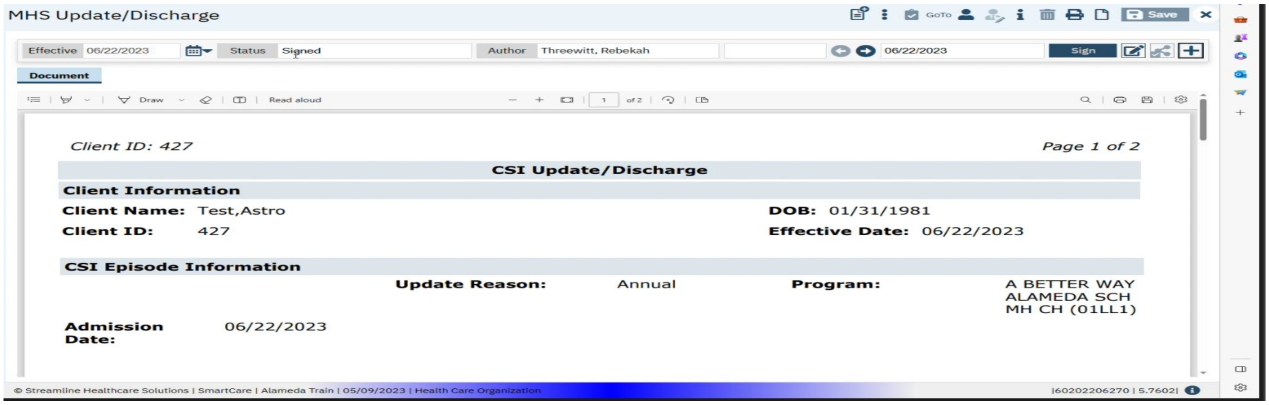
Information is not entered through dashboards or list pages, instead most information is entered into SmartCare by use of documents and detail pages. Documents are individual iterations of a template, and many List Pages are lists of Documents.

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, Annual data and referral letters.

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:

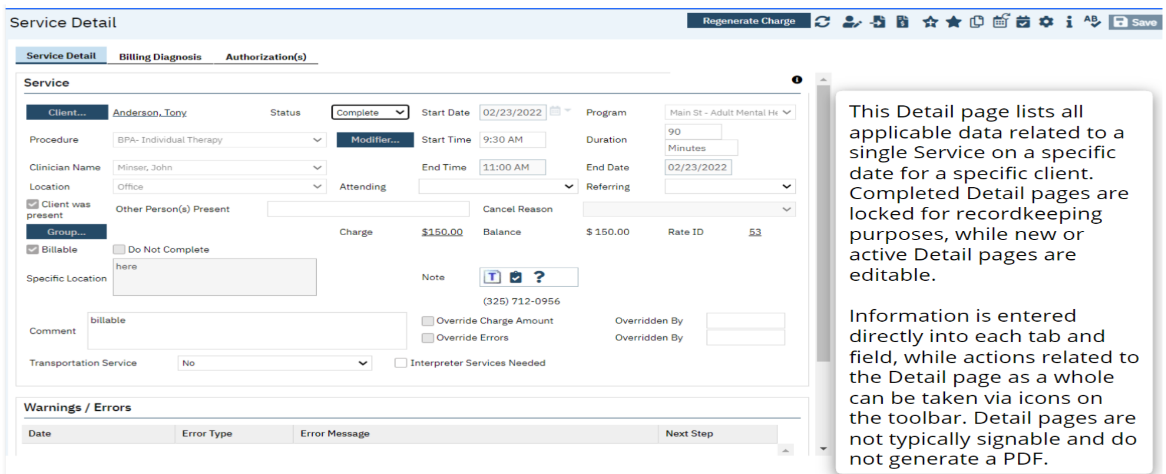


Example of a Discharge pdf.



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.

Chapter 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.

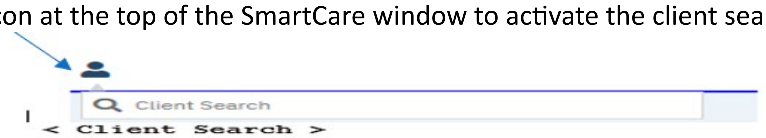
NOTE: It is possible that a client could have multiple last names, multiple first names and aliases, etc. To prevent creating a duplicate client and before registering a new client be sure you have tried all possible spellings of the client's name and aliases.

Preventing Duplicate Client Registration

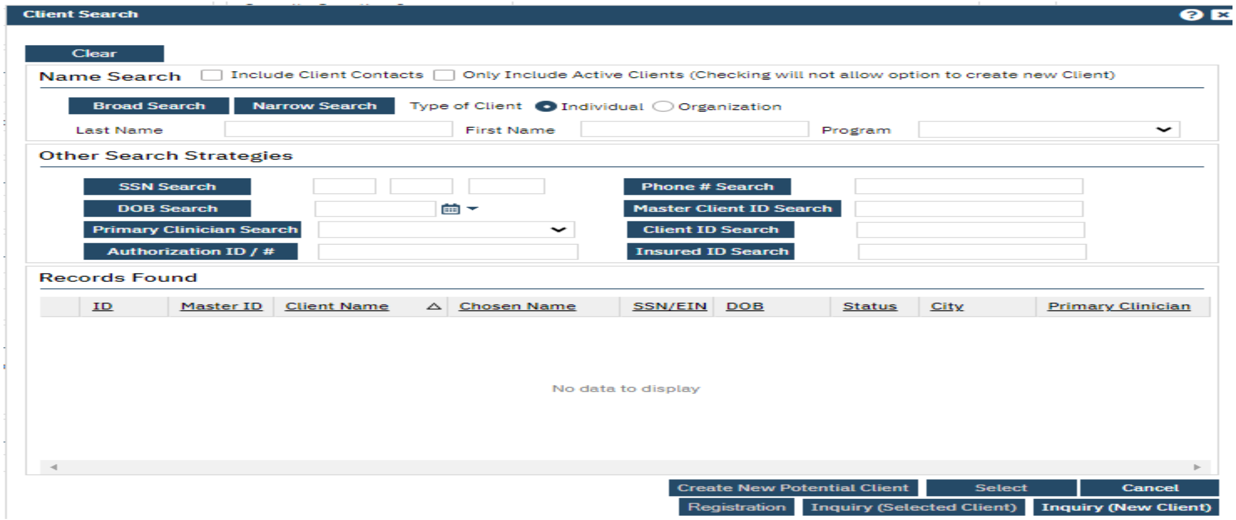
- If there is a Social Security Number (SSN) in the system that is the same as the SSN you are searching for, the system displays an error message and does not let you continue.
    - You ***cannot*** override a Social Security Number match.
    - If you are sure that the SSN you entered is correct refer 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:



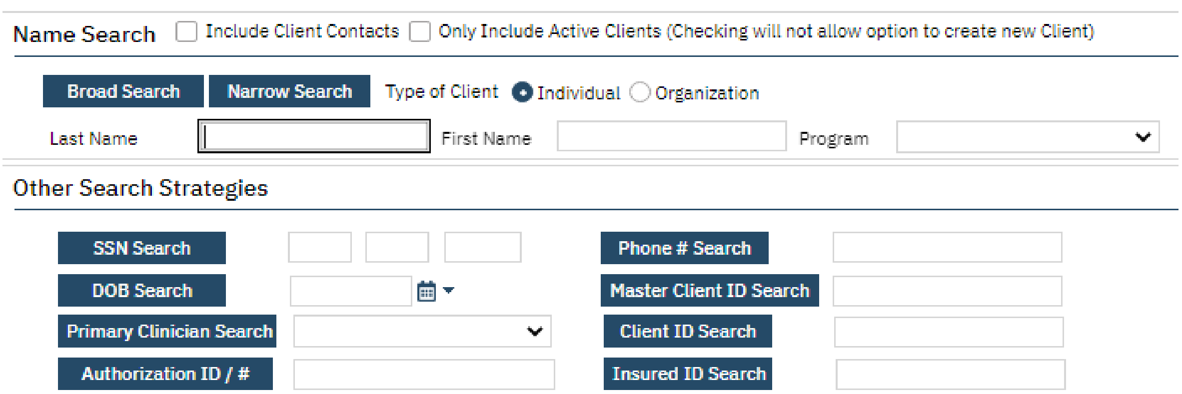
2. Click on the <Client Search> button to activate the Client Search screen as shown below:



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:**



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) 

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

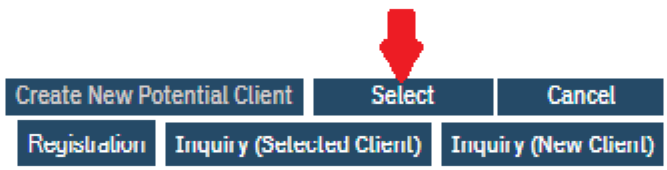
7. Enter the client's DOB and click the DOB Search button DOB Search

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

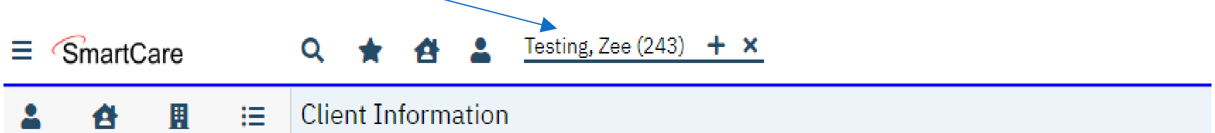
Records Found

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

8. 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



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



STOP **Next step requires moving to the Inquiry to capture required data fields.**

Chapter 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

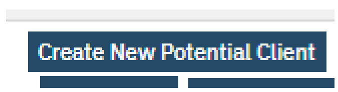
Client Suffix:

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

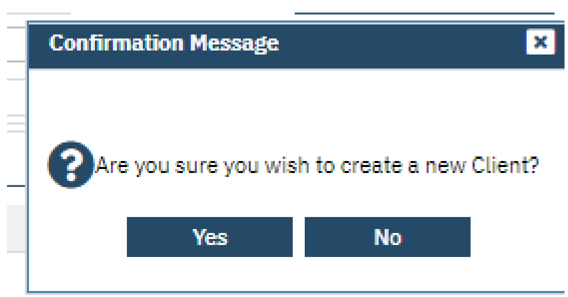
NOTE: SmartCare requires three (3) basic searches before the system will activate the ***Create New Potential Client*** option button to create a new Client ID.

- Broad Search
- SSN Search
- DOB Search

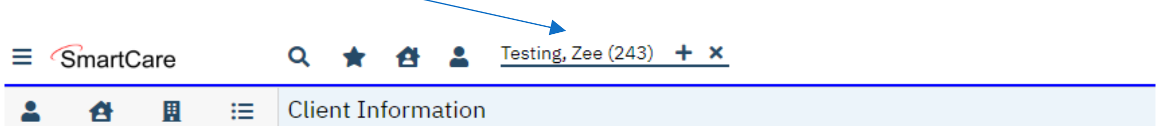
ENTER BASICALLY THE SAME INFORMATION AS USED FOR CLIENT SEARCH - MODIFY AS NEEDED



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



Next step requires moving to the Client Information Screen to capture required data fields.

Chapter 6. Client Information Screen

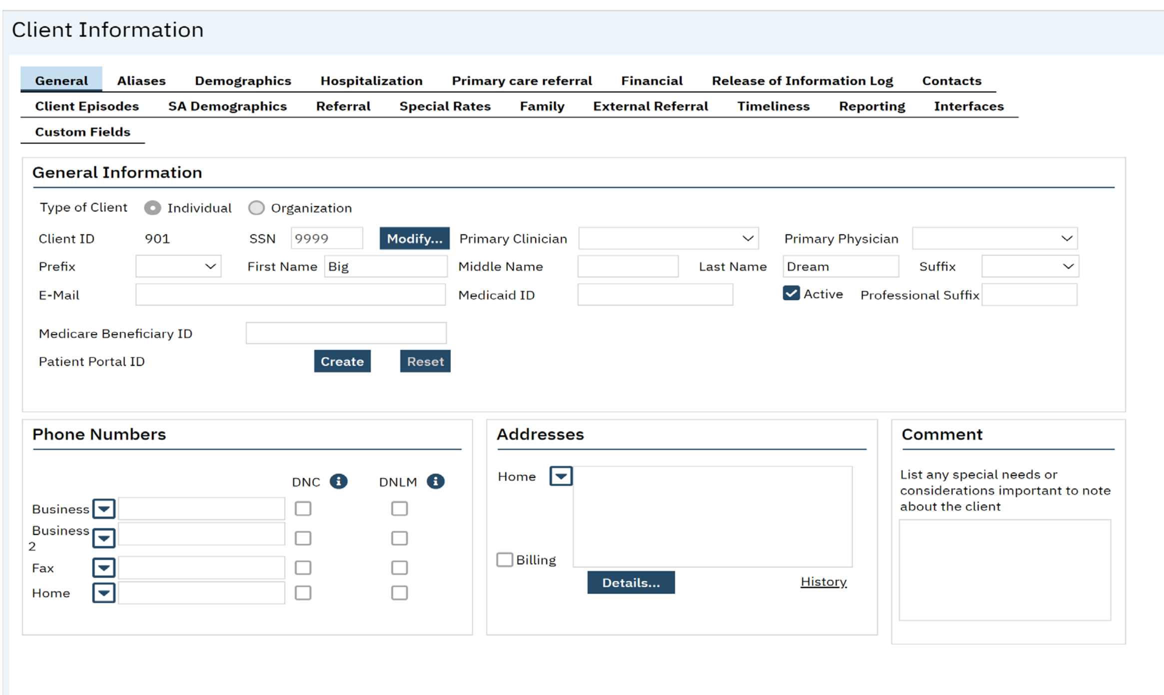
The *Client Information* screen is used to capture required data fields for **General Client Information/demographics**.

Client Information Screen Tabs

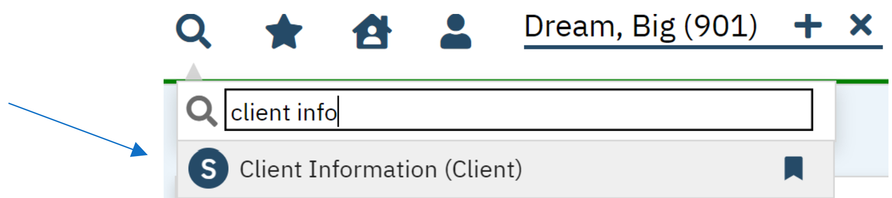
Tabs act like separate pages or sections on a document, typically containing different categories of information. The tabs required to complete the client information screen are noted in **red** font below, the other tabs are available but not required at this time:

#1: General Tab
#2: Aliases Tab
#3: Demographics Tab
#4: Contacts Tab
~~#5 Primary care referral~~
~~#6 Release of Information Log~~
~~#7 Client Episodes~~
~~#8 Family~~
~~#9 Timeliness~~
~~#10 Custom Fields~~

Client Information Screen:



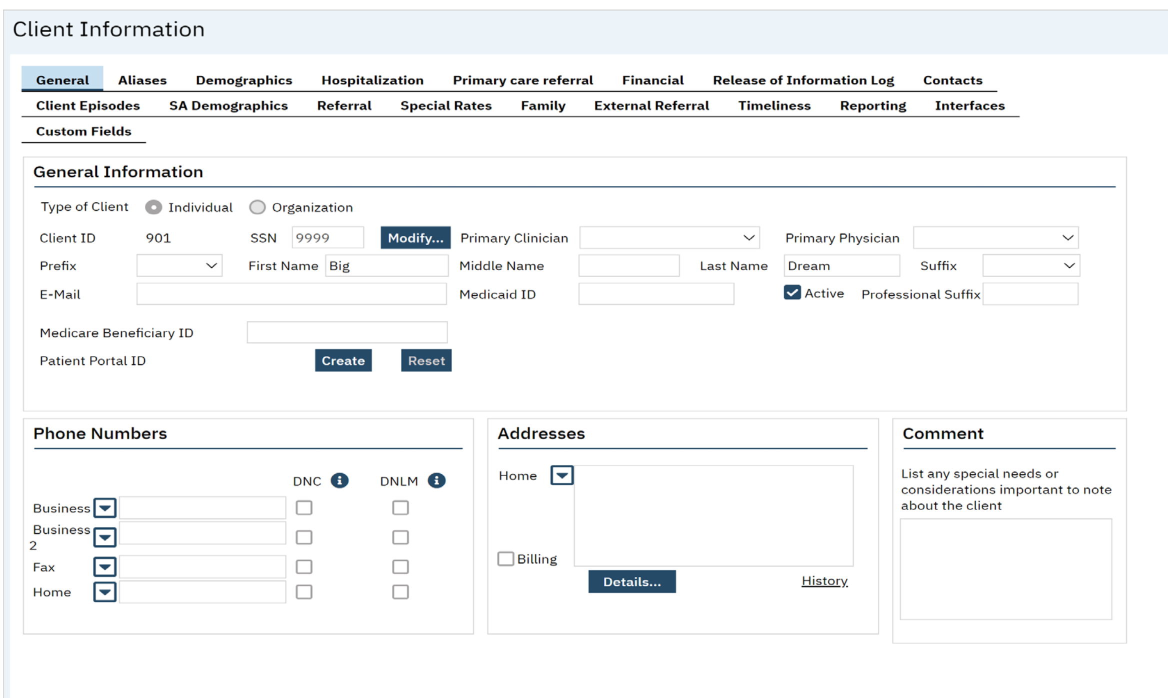
To access the Client Information screen, follow the below steps.



Click on the Magnifying Glass and enter the search term “**Client Info**”.

Select “Client Information (Client)” from the drop list.

This is the screen that you will see when you select Client Information Screen:

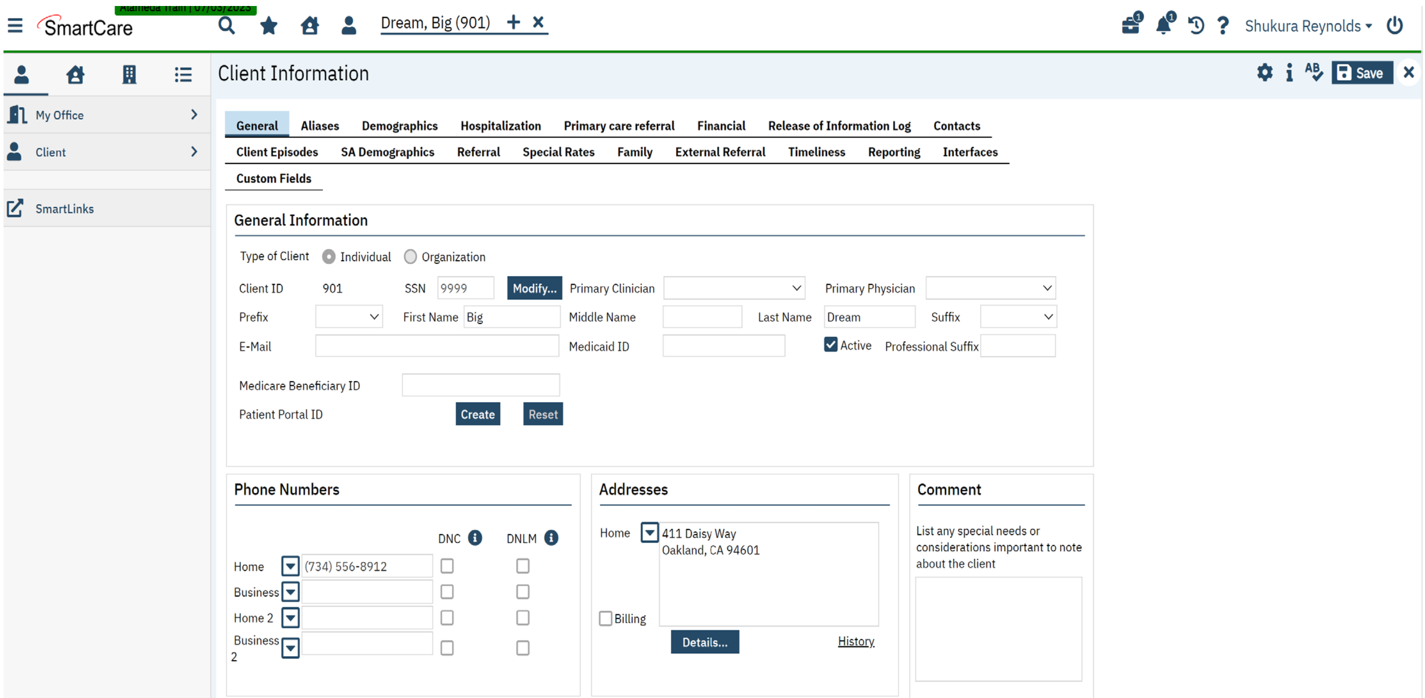


The workflow for completing the Client Information screen is as follows:

1. General Tab
2. Demographics Tab
3. Aliases Tab
4. Client Contact

#1 General Tab

The general tab contains general information about the client such as name, e-mail address, phone number, address, etc. If an Inquiry was performed and/or Client Information was updated, some fields are already populated on this tab.



Data fields on the "General Tab" should be initialized from the client search screen, enter in the remaining required fields and click save.

General Information Section: **Required.**

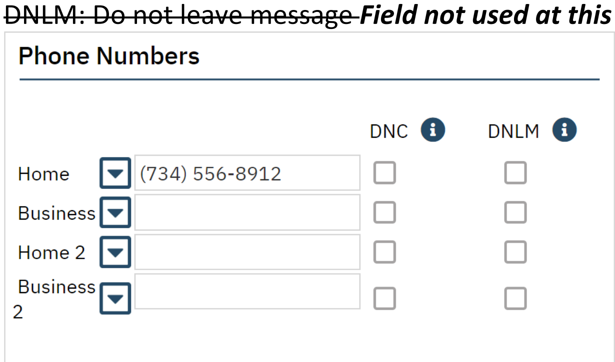
1. Type of Client: **System Informational Field Only.**
2. Client ID: **This information will auto be populated.**
3. SSN: **This information will auto be populated.**
4. ~~Primary Clinician:~~ **Field not used at this time.**
5. ~~Primary Physician:~~ **Field not used at this time.**
6. Prefix: **Optional.**
7. First Name at Birth: **Required.**
8. Middle Name at Birth: **If Applicable.**
9. Last Name at Birth: **Required.**
10. Suffix at Birth: **If Applicable.**

11. Email: **Optional.**
12. Medi-Cal ID: **This information will auto be populated.**
13. Active: **System Informational Field Only.**
14. ~~Professional Suffix:~~ **Field not used at this time.**
15. Medical Beneficiary ID: **Not Required.**
16. ~~Patient Portal ID:~~ **Field not used at this time.**
17. Addresses: **Required.**

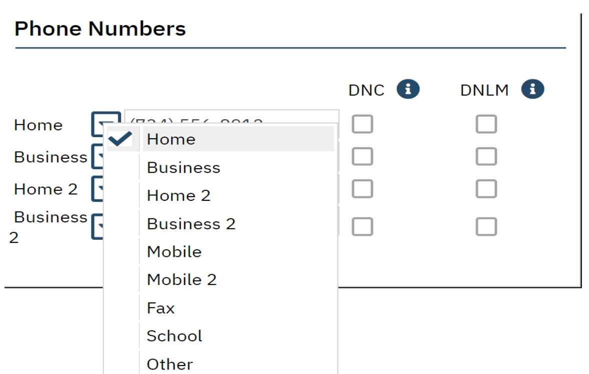
Phone Numbers Section

Collection of client phone numbers is **optional**. Should you collect a telephone number and want to input it into a client record select the phone number field applicable and enter the 10-digit phone number.

- ~~DNC: Do not call~~ ***Field not used at this time.***
- ~~DNLM: Do not leave message~~ ***Field not used at this time.***



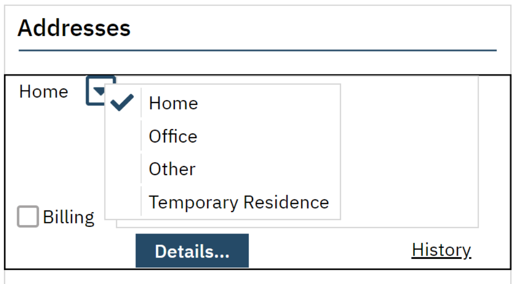
Any of the Phone Number fields can be redefined to the values shown in the pop-up window below. Click the down arrow next to the field whose title you wish to change and select the new title from the pop-up list.



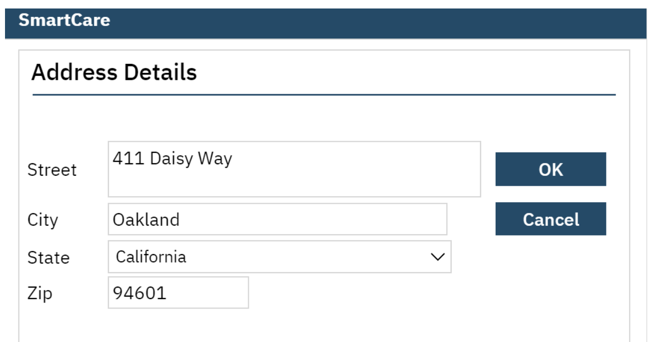
Addresses Section Required.

A client address is **required.** To enter a client address, complete the following.

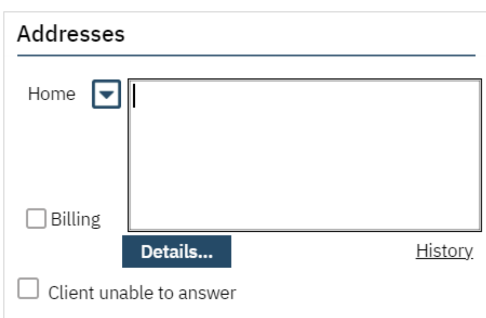
1. Click the down arrow next to Home dropdown to add additional addresses.



2. Click the Details button and a data entry pop-up window will display the specific fields that need to be populated. Once complete select "OK".



TIP: The system is very finicky and 95% of the time if you enter information into the address box, it will give you an error message.



3. By clicking the OK button on the Address Details pop-up window, the address is inserted into the record and is displayed in the text box.

NOTE: If the client is Homeless enter the **Zip Code** for the **City Hall** of the city where the client indicates they most often sleep (in a shelter or on the street). Please see the SmartCare Global Code Tables on Page 58 for a list of the Cities and their zip codes.

Also, if you click on the "History" link, you will find a list of all the previous addresses that have been entered.

Comments Section: Not Required.
You may make any additional comments about client special needs or other items important to note in the textbox.

#2 Aliases Tab Optional.

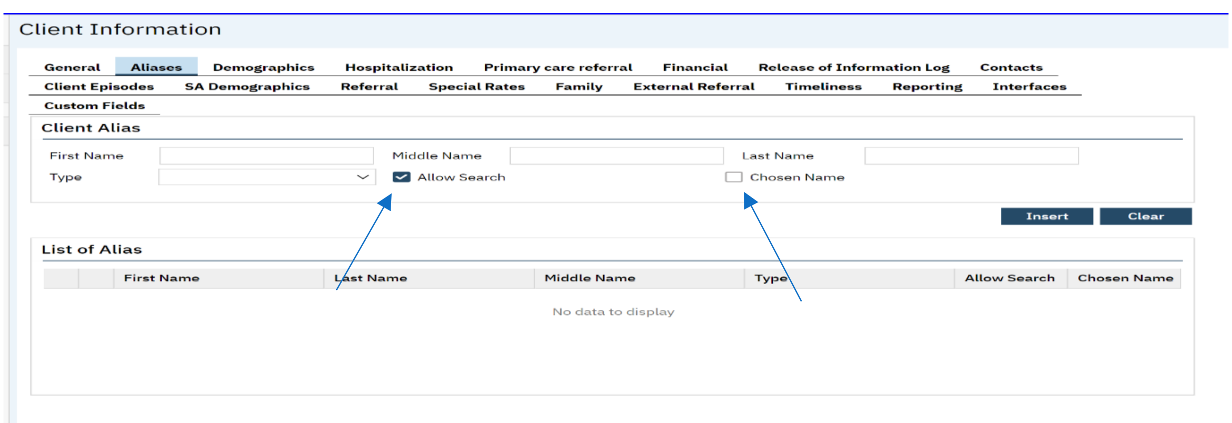
Once you have entered client's general information, if the client has an alias use the Aliases Tab to enter the alias information.

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.

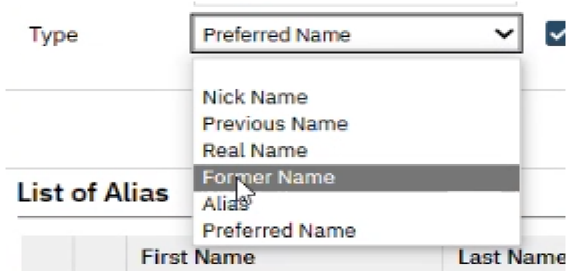
Enter this information when registering a client.

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.



2. Enter Alias information, e.g. First name, Last Name.

3. Assign “Alias Type” by selecting Dropdown Menu

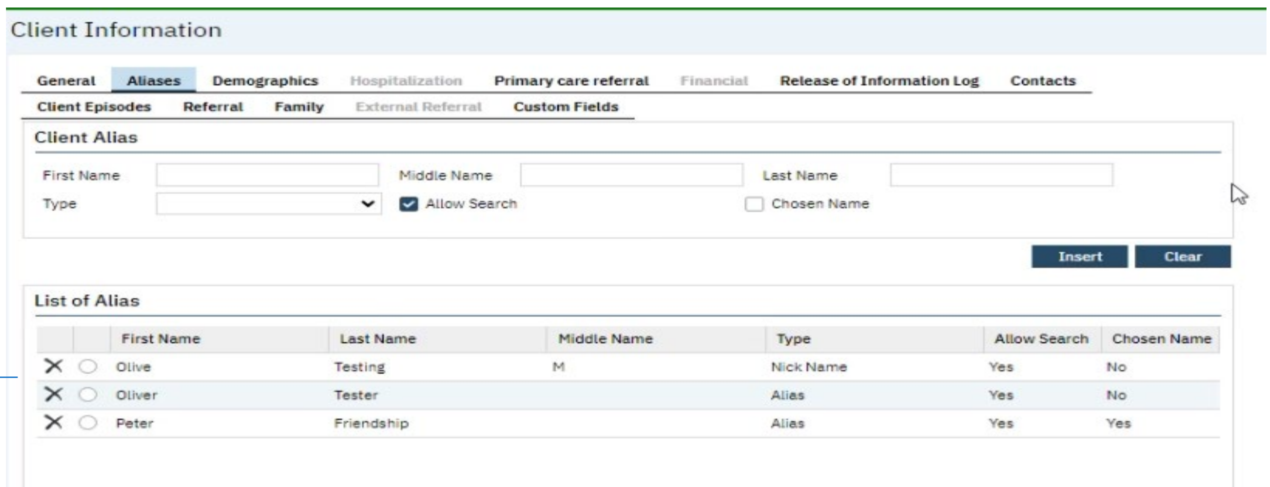


4. “Allow Search” box is auto populated with a checkbox, which enables the search criteria.

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.

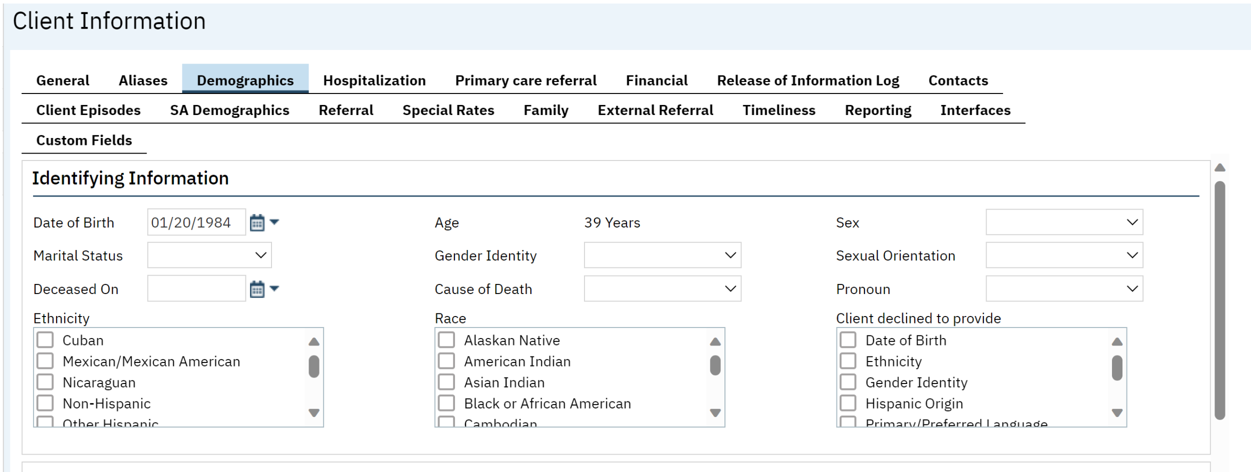
7. Once an Alias is generated and inserted to a client record the Alias will appear on the “List of Alias” table and will appear in searches if you select the allow search box. F



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

#3: Demographics Tab: **Required.**

Some of the data on this tab will be initiated from the client search inquiry.



Identify Information Section: **Required.**

Complete the required fields.

1. Sex: **Required.**
2. Marital Status: **Required.**
3. Gender Identity: **Required.**
4. Sexual Orientation: **Required.**
5. Preferred Pronoun: **Optional.**
6. Ethnicity: **Required; Multi-select field see drop down list of global codes.**
7. Race: **Required; Multi-select field see drop down list of global codes.**
8. ~~Deceased on and Cause of Death are completed by ACBH Staff.~~ **Do Not Complete these fields.**
9. ~~Client declined to provide:~~ **Field not used.**

Primary Care Physician Section: **Not Required.**
Financial Situation Section: **Not Required.**
Living Arrangement Section: **Not Required.**
Educational/Employment Section: **Not Required.**
Language Section: **Not Required.**
Transportation Information Section: **Not Required.**
Preferences Section: **Not Required.**
Picture Section: **Field not used.**

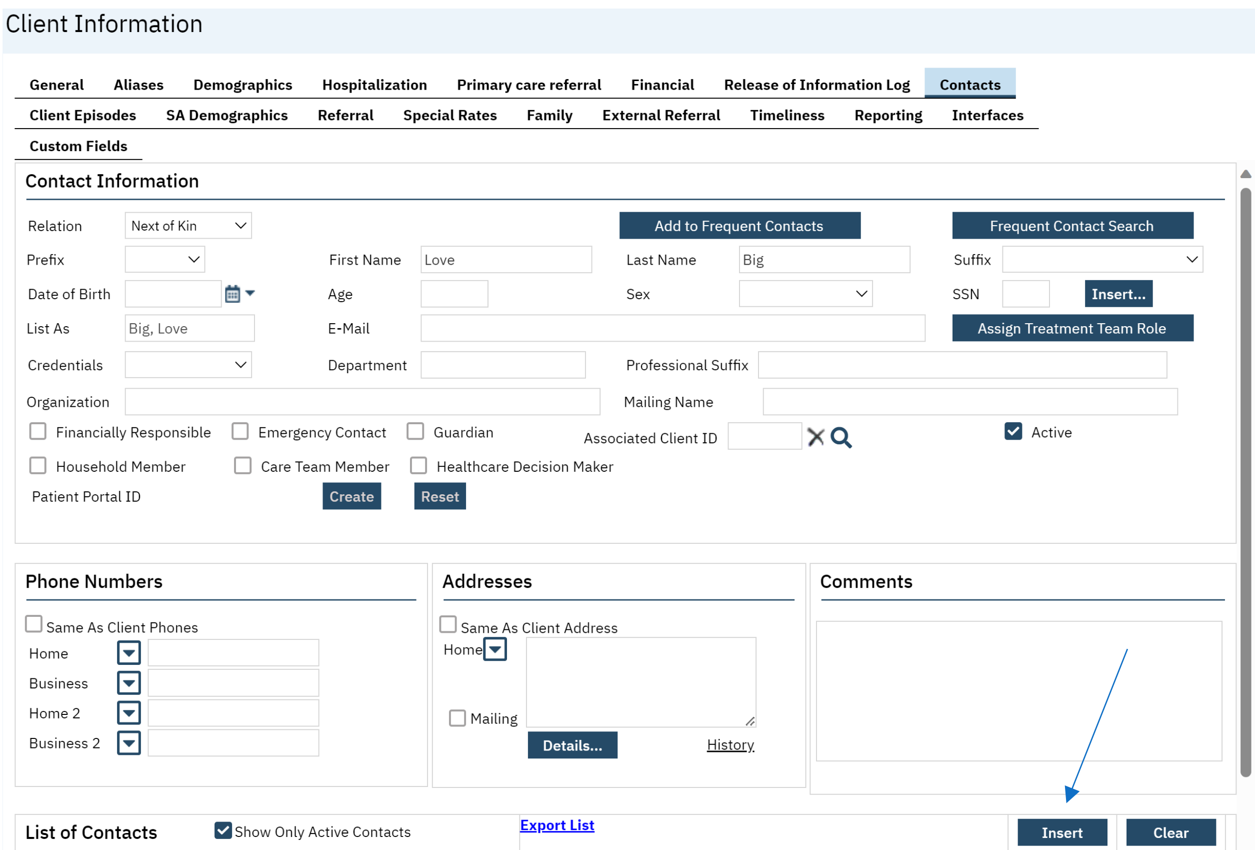
Contacts Tab: **Optional.**

Contacts Tab - Client Information Screen (This tab is optional, but if you choose to utilize it, there is required minimum information that is listed below).

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.

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.
- **Select whether the client relations are as following (Required):** Financially Responsible, Emergency Contact, Guardian, Household Member, Care Team Member, and/or Health Decision Maker

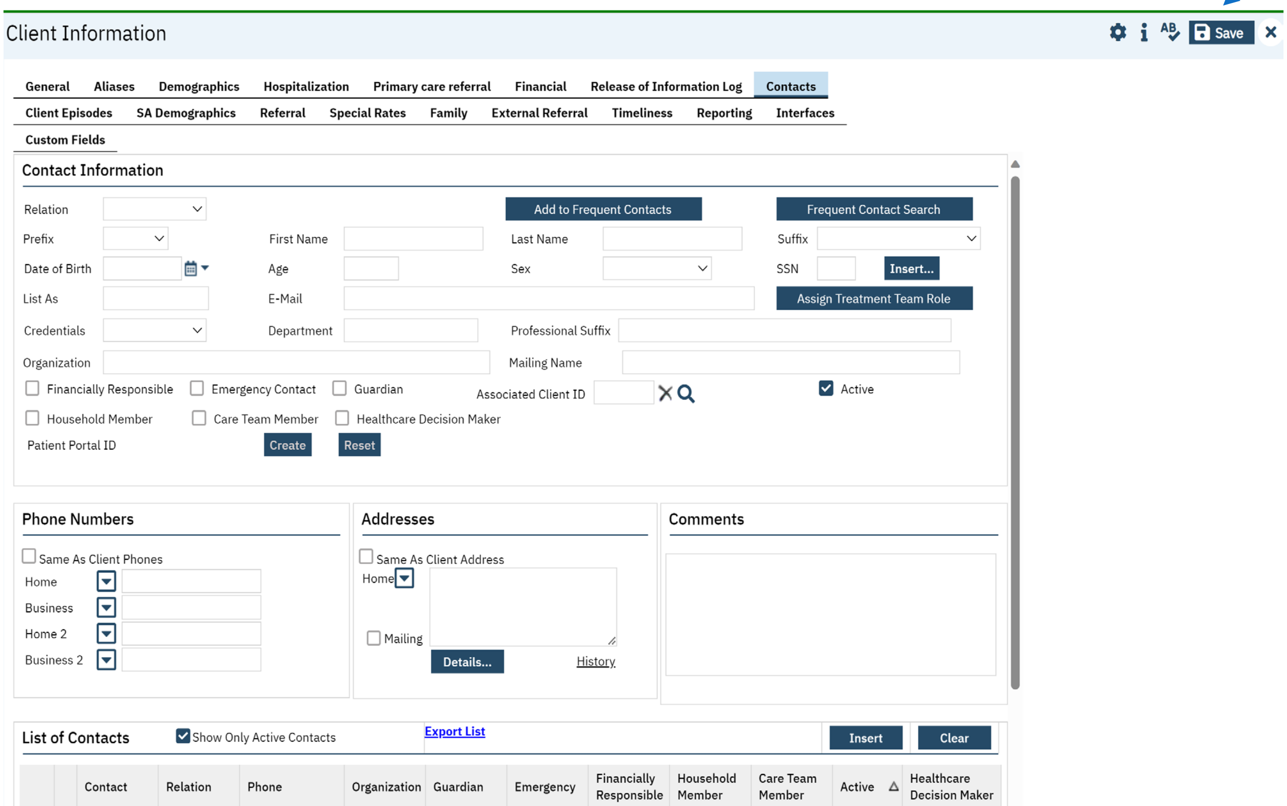


Add a new contact or modify an existing contact by following the steps below.

1. Click the Add/Edit Contacts button. The Client Information screen opens to the Contacts tab.

2. Complete the required fields on the tab and click the Insert button.

Once complete click "save" to finish capturing all data.



Clinicians Gateway:

NOTE: Client Registration must be complete before the clinician can create a progress note in the Clinicians Gateway application.

- **Client Registration/ID information is transferred from the SmartCare system to the Clinicians Gateway application in 5-minute intervals.**

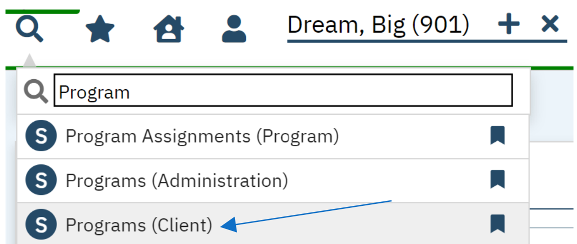
Chapter 7. Program Assignments (Clients)

Program Assignments List Page

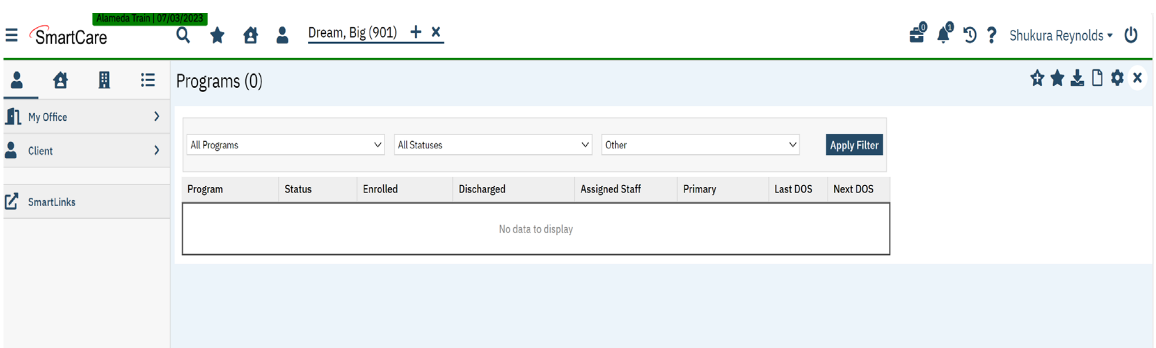
The Program Assignment List Page is where you can *enroll clients into Programs and Discharge Clients from programs*.

To access the *Program Assignment List Page* begin typing programs in the search bar.

1. Select *Programs (Client)* from the dropdown list.



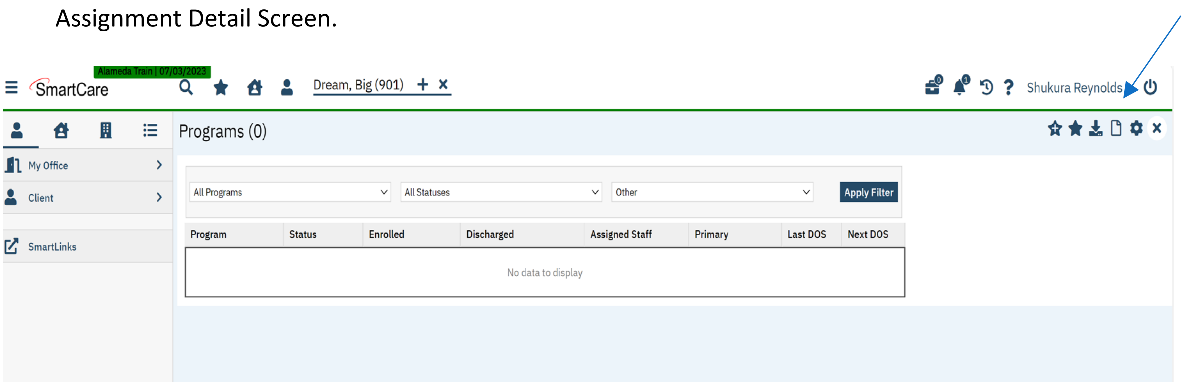
This screen should appear once selected.



Program Assignments Details Screen

Program Enrollment

To enroll a client in a program from the programs list page select the paper Icon to open the Program Assignment Detail Screen.



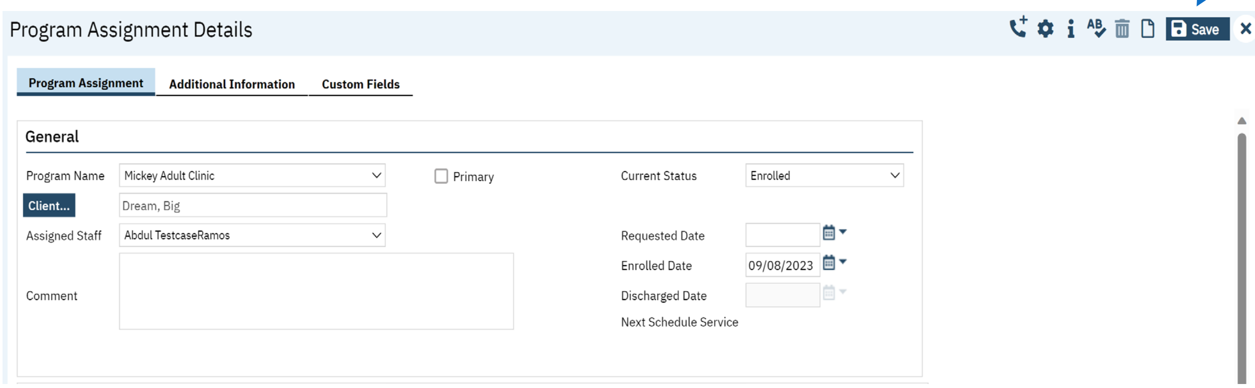
Program Assignments Tab: **Required.**

Program Enrollment

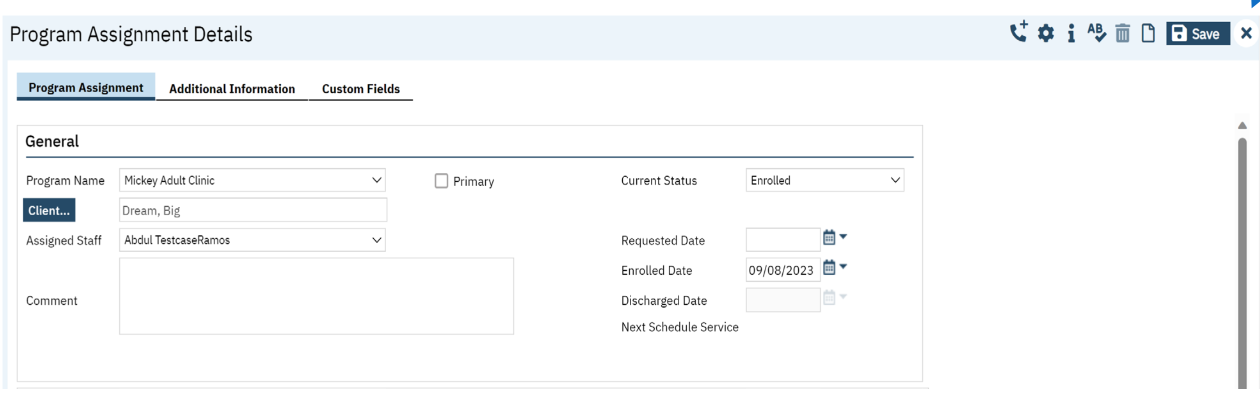
1. You will need to complete these fields to Enroll the client.

    1. Program Name: **Required.** Select the applicable program per the enrolment documentation.
    2. Assigned Staff: **Required.** Select the Assigned Staff member.
    3. Current Status **Required.** Select "**Enrolled**" from the dropdown list.
    4. ~~Requested Date: **Not Required.**~~
    5. Enrolment Date: **Require.**
    6. ~~Waitlist Priority: **Not Required.**~~

2. Click the Save button.



3. Click on the close icon.

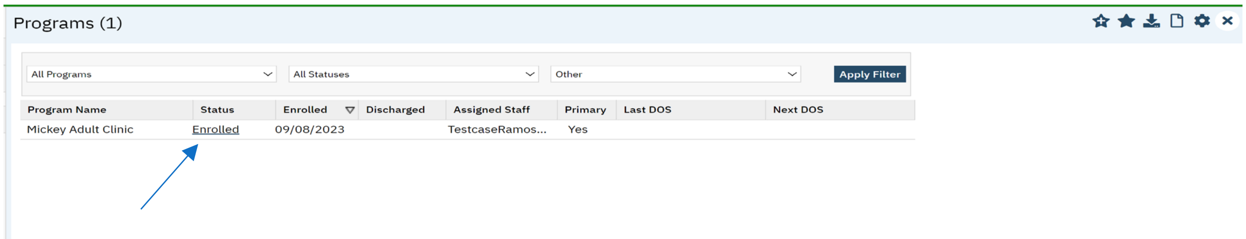


~~Additional Info Tab:~~ **Not Required.**
~~Custom Fields Tab:~~ **Not Required.**

Referred from/Referred to Tab: 

ACBH to inform when this tab is available for use.

4. Once save, the *Program Assignment List page* will reflect the client as enrolled in the respective program.



Clinicians Gateway:

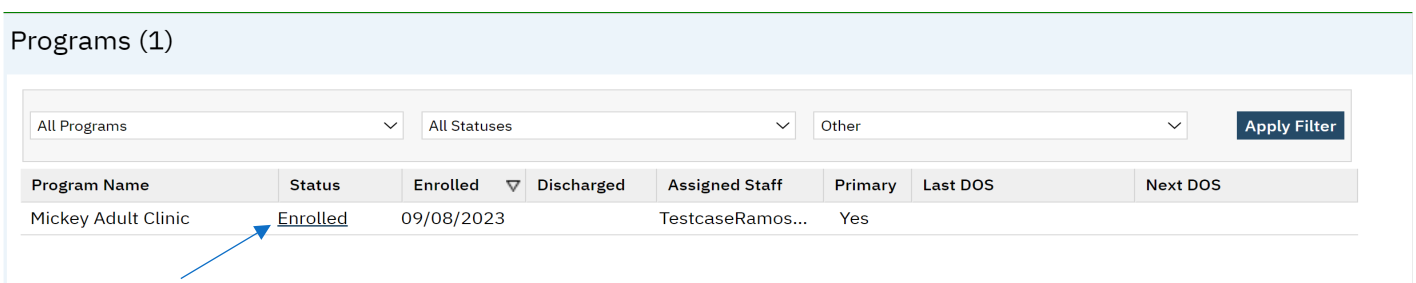
NOTE: A Program Enrollment must be opened before the clinician can create a progress note in the Clinicians Gateway application.

- Timeliness of enrolling a client into their treatment program is extremely important for the Clinician to begin their process of writing their clinical note in Clinicians Gateway.
- **Program enrollment data is transferred from the SmartCare system to the Clinicians Gateway application in 15-minute intervals.**
  - Updates to existing client and Program Assignments are **transferred nightly** from the SmartCare system to the Clinicians Gateway application.

Program Discharge

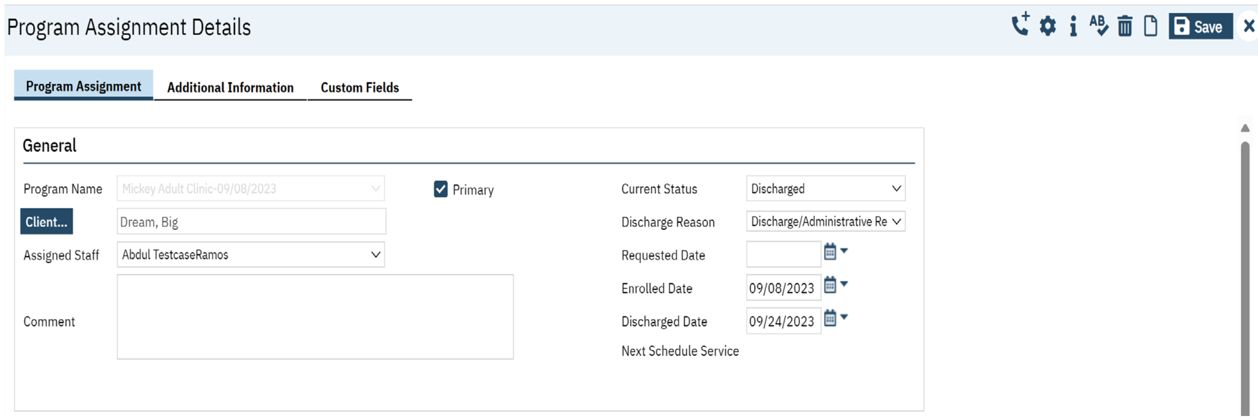
To discharge a client from the *Programs List page*, follow the below steps.

1. On the program list page under the Status column, select the hyperlink "Enrolled" of the program to be discharged.

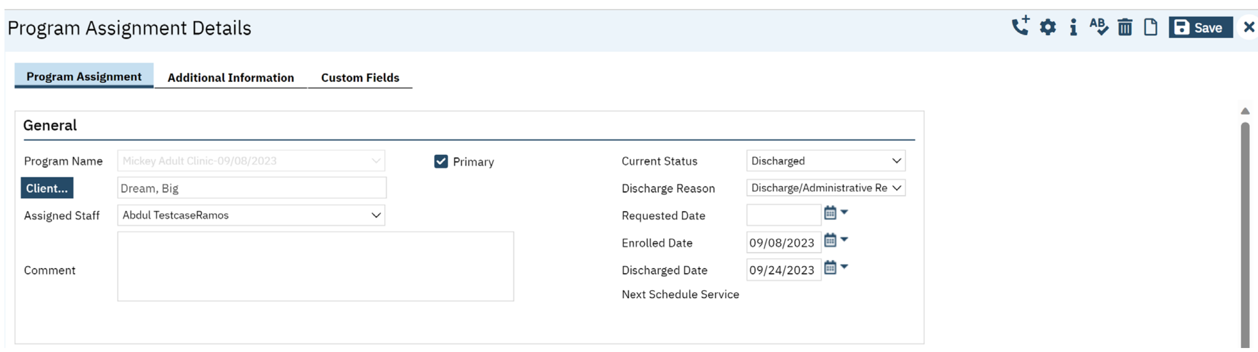


2. You need to complete these fields in order to discharge the client.
   a. Current Status: **Required**. Select "**Discharge"**
   b. Discharge Reason: **Required**. Select the Discharge Reason.
   c. Discharge Date: **Require.**

3. Click the Save button.



4. Click on the close icon.

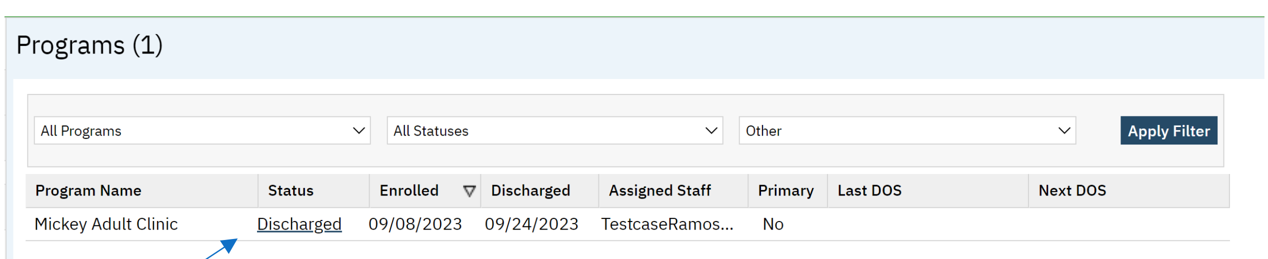


~~Additional Info Tab:~~ **Not Required.**
~~Custom Fields Tab:~~ **Not Required.**

Referred from/Referred to Tab: 

ACBH to inform when this tab is available for use. `

5. Client discharged from program.



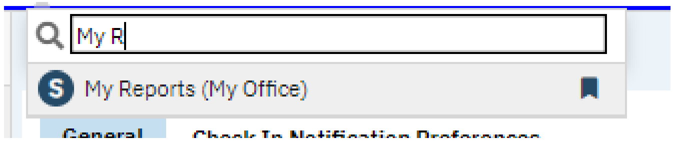
Note: You can review this client's history within the program, under the Program Assignment Details Screens; History List section.

History

Status	Requested Date	Enrolled Date	Discharged Date	Assigned Staff	Primary	Prerequisite	Priority Population	Priority Number	Modified By	Modified On	Waitlist Comme	Discharge Reason
Discharged		09/08/2023	09/24/2023	TestcaseRam...	No				ReynoldsShu	9/22/2023 4:...		Discharge/Admin...
Enrolled		09/08/2023		TestcaseRam...	Yes				ReynoldsShu	9/22/2023 4:...		

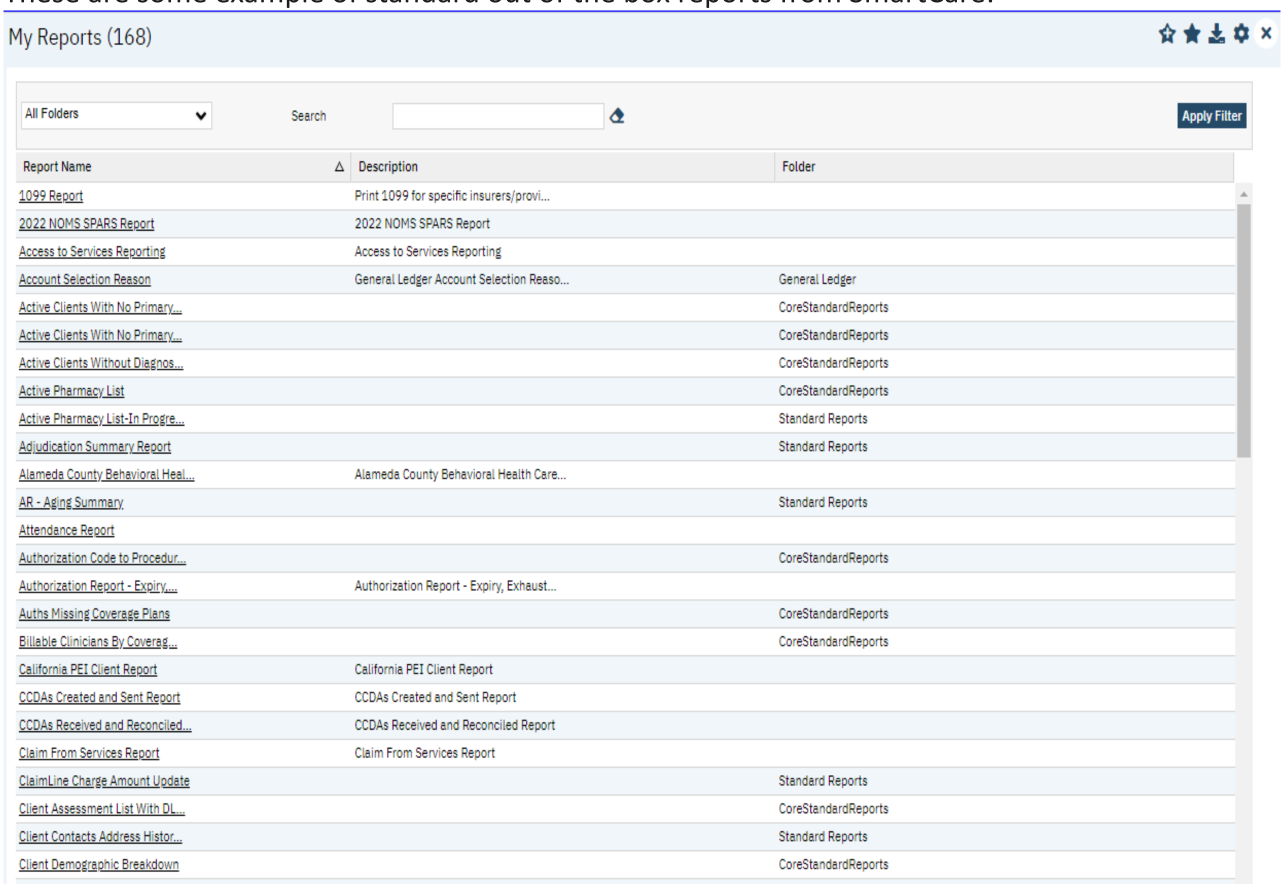
Chapter 8. Reports

SmartCare comes equipped with a suite of standard reports, which cover a wide variety of organizational needs. Each user can find the reports that they are permissioned to see by looking at “My Reports Screen”.



In addition, reports are easily permissioned, and administrators can ensure that the right staff can access the reports they need without cluttering their accounts with unnecessary options. You can search by folder or by entering text into the search box to find your report.

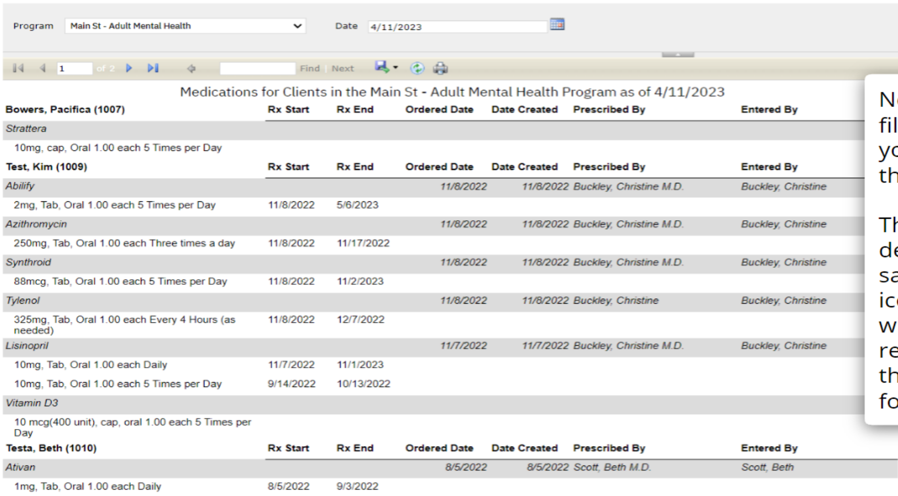
These are some example of standard out of the box reports from SmartCare:



Report Name	Description	Folder
1099 Report	Print 1099 for specific insurers/provi...	
2022 NOMS SPARS Report	2022 NOMS SPARS Report	
Access to Services Reporting	Access to Services Reporting	
Account Selection Reason	General Ledger Account Selection Reaso...	General Ledger
Active Clients With No Primary...		CoreStandardReports
Active Clients With No Primary...		CoreStandardReports
Active Clients Without Diagnos...		CoreStandardReports
Active Pharmacy List		CoreStandardReports
Active Pharmacy List-In Progre...		Standard Reports
Adjudication Summary Report		Standard Reports
Alameda County Behavioral Heal...	Alameda County Behavioral Health Care...	
AR - Aging Summary		Standard Reports
Attendance Report		
Authorization Code to Procedur...		CoreStandardReports
Authorization Report - Expiry,...	Authorization Report - Expiry, Exhaust...	
Auths Missing Coverage Plans		CoreStandardReports
Billable Clinicians By Coverag...		CoreStandardReports
California PEI Client Report	California PEI Client Report	
CCDAs Created and Sent Report	CCDAs Created and Sent Report	
CCDAs Received and Reconciled...	CCDAs Received and Reconciled Report	
Claim From Services Report	Claim From Services Report	
ClaimLine Charge Amount Update		Standard Reports
Client Assessment List With DL...		CoreStandardReports
Client Contacts Address Histor...		Standard Reports
Client Demographic Breakdown		CoreStandardReports
Client Insurance & Date Span R...		

Administrators can even permission selected reports into Quick Links. Nearly every report has filtering and export into excel capabilities.

My Reports



Program: Main St - Adult Mental Health   Date: 4/11/2023

1 of 2   Find | Next

Medications for Clients in the Main St - Adult Mental Health Program as of 4/11/2023

Bowers, Pacifica (1007)	Rx Start	Rx End	Ordered Date	Date Created	Prescribed By	Entered By
Strattera						
10mg, cap, Oral 1.00 each 5 Times per Day						
Test, Kim (1009)	**Rx Start**	**Rx End**	**Ordered Date**	**Date Created**	**Prescribed By**	**Entered By**
Abilify			*11/8/2022*	*11/8/2022*	*Buckley, Christine M.D.*	*Buckley, Christine*
2mg, Tab, Oral 1.00 each 5 Times per Day	11/8/2022	5/6/2023				
Azithromycin			*11/8/2022*	*11/8/2022*	*Buckley, Christine M.D.*	*Buckley, Christine*
250mg, Tab, Oral 1.00 each Three times a day	11/8/2022	11/17/2022				
Synthroid			*11/8/2022*	*11/8/2022*	*Buckley, Christine M.D.*	*Buckley, Christine*
88mcg, Tab, Oral 1.00 each 5 Times per Day	11/8/2022	11/2/2023				
Tylenol			*11/8/2022*	*11/8/2022*	*Buckley, Christine*	*Buckley, Christine*
325mg, Tab, Oral 1.00 each Every 4 Hours (as needed)	11/8/2022	12/7/2022				
Lisinopril			*11/7/2022*	*11/7/2022*	*Buckley, Christine M.D.*	*Buckley, Christine*
10mg, Tab, Oral 1.00 each Daily	11/7/2022	11/1/2023				
10mg, Tab, Oral 1.00 each 5 Times per Day	9/14/2022	10/13/2022				
Vitamin D3						
10 mcg(400 unit), cap, oral 1.00 each 5 Times per Day						
Testa, Beth (1010)	**Rx Start**	**Rx End**	**Ordered Date**	**Date Created**	**Prescribed By**	**Entered By**
Ativan			*8/5/2022*	*8/5/2022*	*Scott, Beth M.D.*	*Scott, Beth*
1mg, Tab, Oral 1.00 each Daily	8/5/2022	9/3/2022				

Nearly every report has filtering parameters. Select your parameters at the top, then click View Report.

The report will populate for the desired parameters. You can save or print the report using icons in the toolbar, or re-run it with new parameters. If the report has multiple pages, use the blue arrows to go to forward or backward.

ACBH Standard Reports will be forthcoming in the coming weeks.

Chapter 10: Services

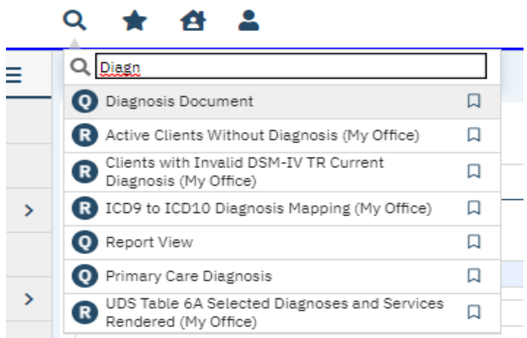
In October 2023, we will be providing SmartCare Training on Services and the different ways to record services provided by programs directly to clients. Additional Information will be coming soon.

Chapter 9: Diagnosis Document (NON-CALOMS PROGRAMS USE ONLY)

The *Diagnosis document* contains the client's diagnosis. If there is already a signed *Diagnosis document* for the client, that diagnosis will initiate when you open the *Diagnosis Document*. The *Diagnosis document* can be used to add, update, or remove diagnosis information.

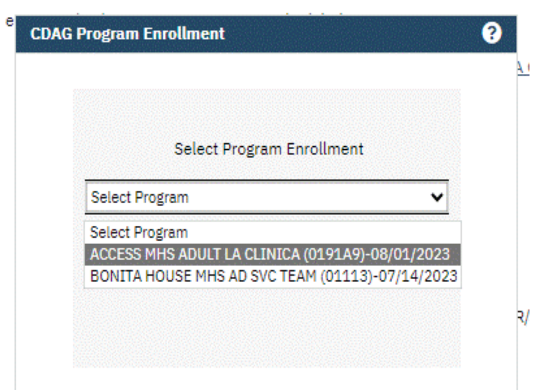
IMPORTANT NOTE: Program enrollment must be completed, and the Program Status must be **Enrolled** before you can sign the diagnosis document, also the diagnosis document should be updated before any client is discharged, or you will not be able to return to complete that information.

1. To access the diagnosis document begin typing Diagnosis in the search bar and the Diagnosis Document will appear on the list.

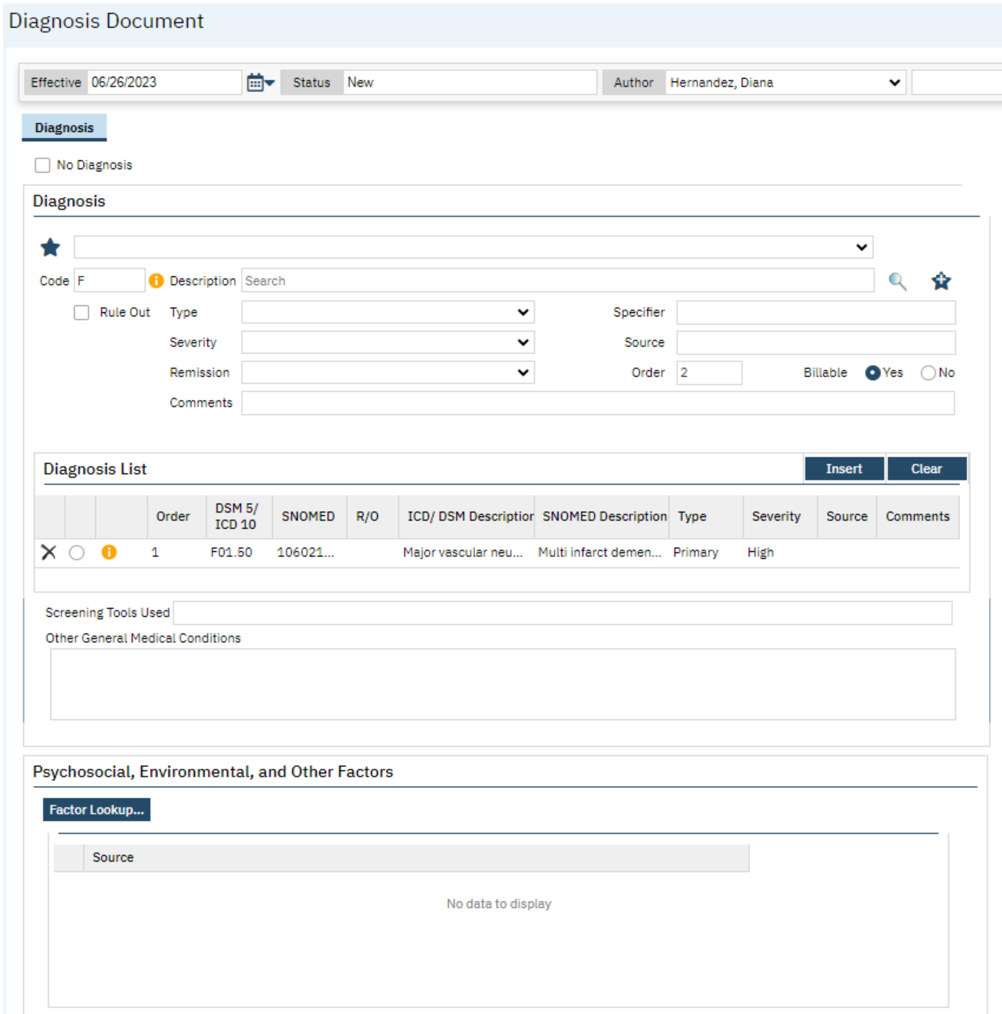


2. Select the Diagnosis Document:

3. Select Program in the CDAG Program Enrollment popup.

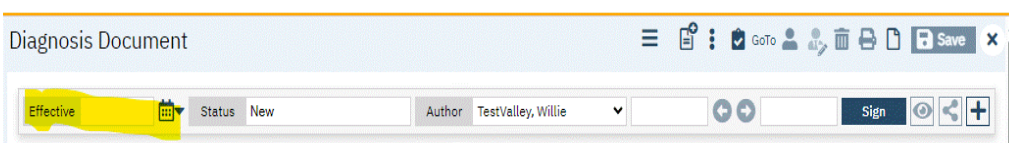


4. Diagnosis Document displayed.



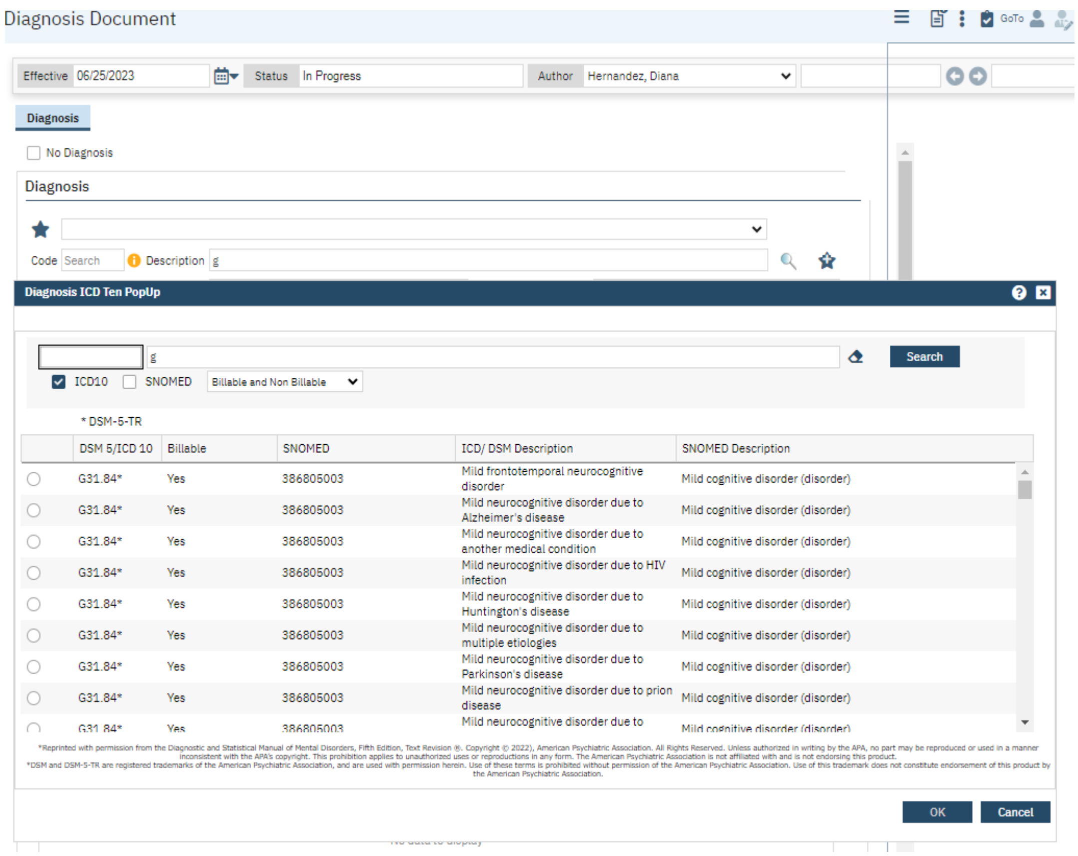
To complete the Diagnosis Document:

1. Change the Effective date to the match the Program enrollment date.



2. In the "Code" field, begin typing the first letter of the code, e.g. "F" (the list contains ICD10/DSM 5 codes). 

3. Click on the Magnifying Glass ( and enter the search term "Diagnosis".
4. Select a diagnosis from the dropdown list, below is an example of the drop down with ICD-10 codes:



NOTE: Use code without an * (* indicate DSM 5 description) for ICD-10 description

1. The Diagnosis Code and description fields will populate the diagnosis information. (2)
2. Select the code and press the "Insert" button.

TIP: Click on the favorite button if this is a diagnosis code that you use often. That way there is no need to go through all the codes.

Diagnosis Entry Section:

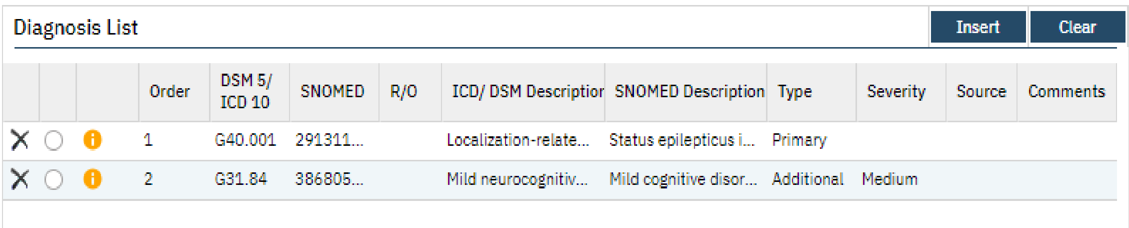
1. Type: **Required.** This is required for Primary diagnosis. It indicates the type of diagnosis; Primary, Additional, or Provisional.
2. Severity: **Not Required.**
3. Remission: **Not Required.**
4. Comments: **Not Required.**
5. Specifier: **Not Required.**
6. Source: **Not Required.**

7. Billable: **Required.** Select the appropriate radio button to show if this procedure is billable when applicable.

NOTE: In the “Order” column you can change the diagnosis order if they need to be updated.

Primary diagnosis needs to have **Order** set to 1.

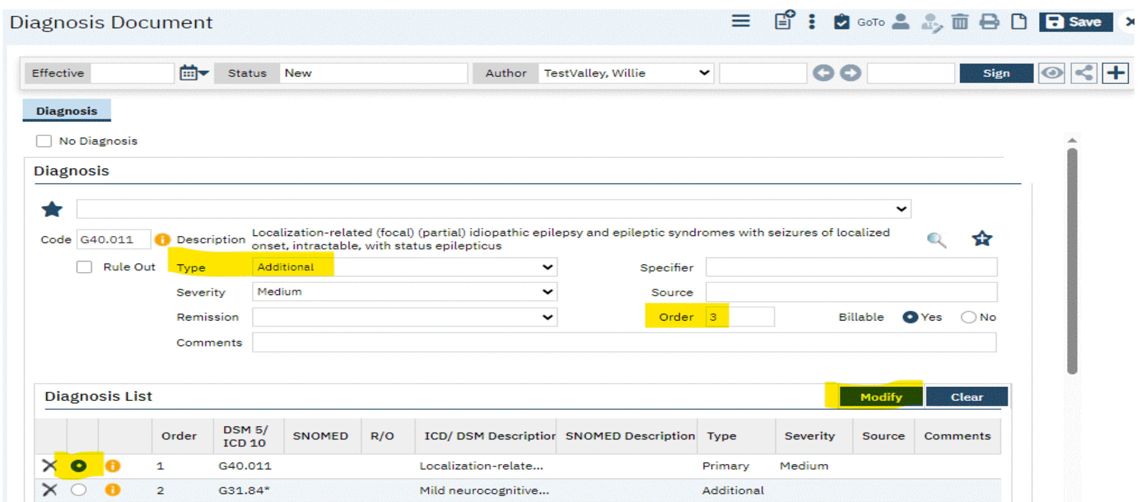
You will need to reorder the diagnoses list if you need to add a new primary diagnosis.



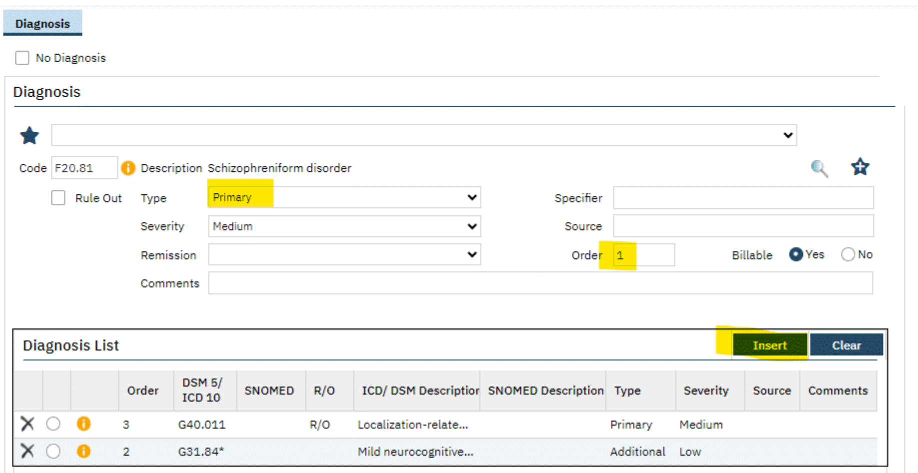
Diagnosis List — Insert — Clear

			Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Descriptior	SNOMED Description	Type	Severity	Source	Comments
X	○	i	1	G40.001	291311...		Localization-relate...	Status epilepticus i...	Primary			
X	○	i	2	G31.84	386805...		Mild neurocognitiv...	Mild cognitive disor...	Additional	Medium		

1. Select the radio button to select the current primary in the Diagnosis list.
2. Change the order to the next number after the last Order number in the Diagnosis list.
3. Change the Type to Additional or Provisional
4. Select the **Modify** button to save the change.



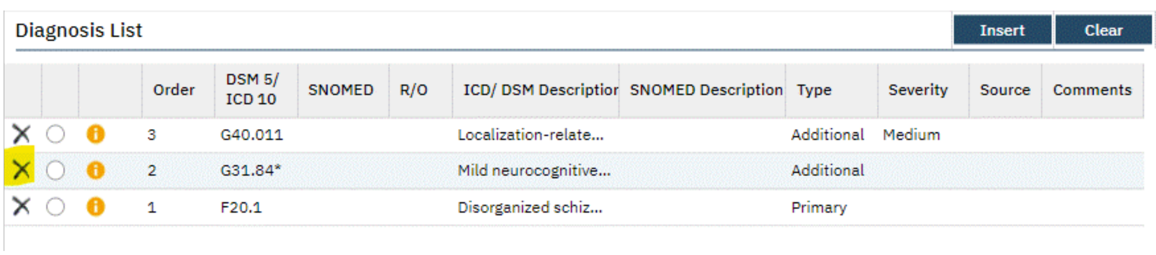
5. Create new Primary diagnosis.
6. Set the Order to 1.
7. Select **Insert.**



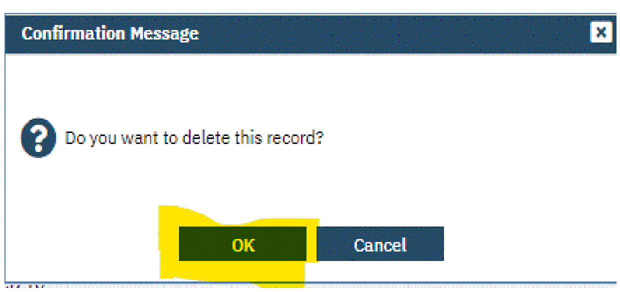
8. Repeat Steps 1 – 4 to change the order of the Additional diagnosis.

Deleting diagnosis from the diagnosis list

Check on the delete icon next to the diagnosis to be deleted.



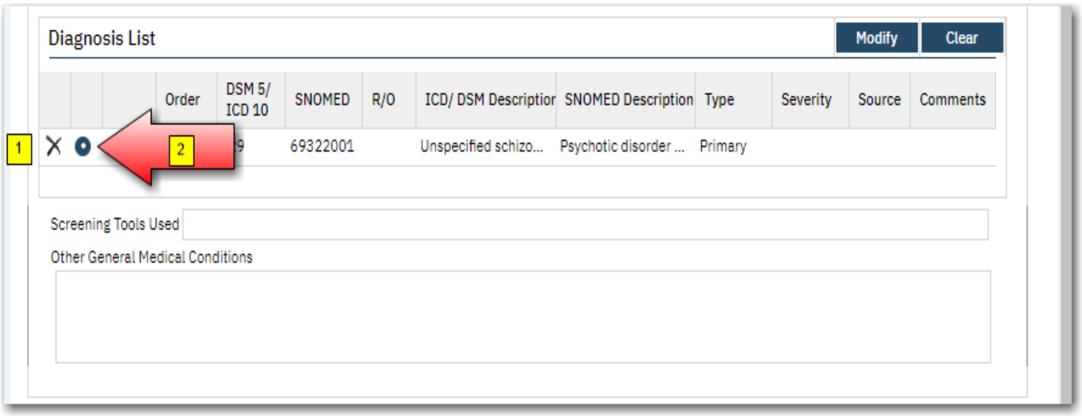
Confirm deletion.



NOTE: The Diagnosis list will contain diagnoses from previous program enrollments. Delete all diagnoses that do not apply to the current program enrollment.

Diagnosis List Section

If multiple diagnoses are listed in the Diagnosis List section, use the radio button (2) to select one if you wish to add notes in the "Screening Tools" or "Other General Medical Conditions" fields of the Diagnosis list section.

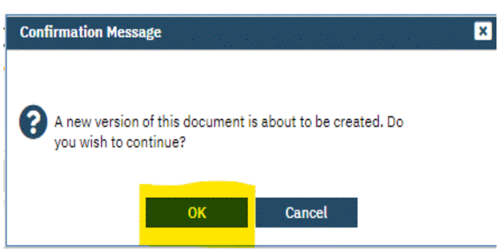


1. Select the Modify Button:
2. Screening Tools Used: **Not Required.** Enter screening tools utilized for data collection.
3. Other General Medical Conditions: **Not Required.** Enter other medical conditions here.
4. Click the insert button to create the entry on the diagnosis list. (1)

<u>Edit Diagnosis document</u>

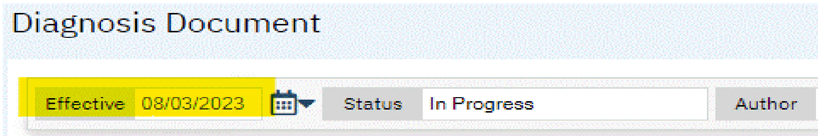
Select edit icon.

Confirm edit.



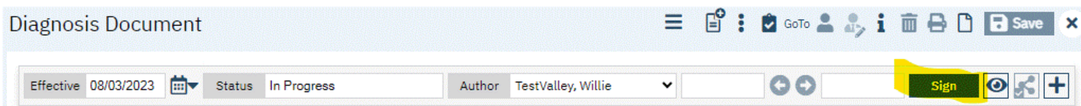
Edit Diagnosis document signed by the same author

1. **Effective date must be the same as the program enrollment date.**

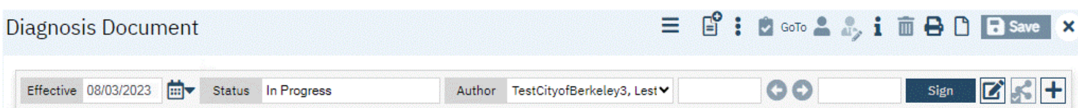


2. Make the updates.

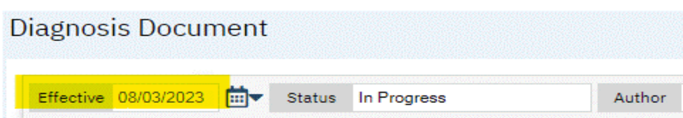
3. Sign Diagnosis document.



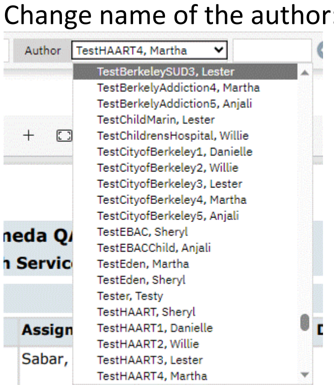
Edit Diagnosis document signed by a different author



1. **Effective date must be the same as the program enrollment date.**



2. Change name of the author: Select **your** name from drop down.



3. Make update.
4. Sign the Diagnosis document.

Chapter 10. Appendix A

SmartCare Global Codes Tables

This document lists SmartCare Global codes for: Client General/Demographic Information and the Program Assignment Detail screens.

Homeless: Enter the Zip Code for the City Hall of the city where the client indicates they most often sleep (in a shelter or on the street).

City Hall Codes use for Homeless Client Address			
Alameda	**94501**	**Newark**	**94560**
Albany	**94706**	**Oakland**	**94612**
Berkeley	**94704**	**Piedmont**	**94611**
Castro Valley	**94546**	**Pleasanton**	**94566**
Dublin	**94568**	**San Leandro**	**94577**
Emeryville	**94608**	**San Lorenzo**	**94580**
Fremont	**94538**	**Sunol**	**94586**
Hayward	**94541**	**Union City**	**94587**
Livermore	**94550**		

Sex/Sex Assigned at Birth – (*) CSI

Female	Male	Unknown

Marital Status

Never married Married Widowed	Divorced Separated Unknown

Gender Identity (current)

Male Female Intersex Gender Queer (not exclusively male or female)	Transgender: Male to Female/Transgender Female/Trans Woman Transgender: Female to Male/Transgender Male/Trans Man	Gender non-conforming Other Additional Gender Category Prefer Not to Answer Unknown

Sexual Orientation

Heterosexual/Straight Gay Lesbian Bisexual	Queer Questioning Other Additional Sexual Orientation	Prefer Not to Answer Unknown

What is your Pronoun (Personal (or preferred) Pronoun)

He/Him She/Her	They/Them Other Pronoun	Prefer Not to Answer Unknown

Ethnicity – (*) CSI

Non-Hispanic	Nicaraguan	Puerto Rican
Cuban	Other Hispanic	Salvadoran
Mexican/Mexican American	Other Latino	South American

Race – (*) CSI

White or Caucasian	Guamanian	Other Asian
Black or African American	Hawaiian Native	Other Pacific Islander
Alaskan Native	Hmong	Other Southeast Asian
American Indian	Japanese	Samoan
Asian Indian	Korean	Vietnamese
Cambodian	Laotian	Other/Other Race
Chinese	Mien	Unknown
Filipino	Mixed Race/Multiracial	

Discharge Reason

Disengaged Before Admission	Client Withdrew: AWOL, AMA, No Improvement	Discharge/Administrative Reasons
Mutual Agreement/Treatment Goals Reached	Client Died	Other
Mutual Agreement/Treatment Goals Partially Reached	Client Moved Out of Service Area	
Mutual Agreement/Treatment Goals Not Reached	Client Discharged/Program Unilateral Decision	
Client Withdrew: AWOL, AMA, Treatment Partially completed	Client Incarcerated	