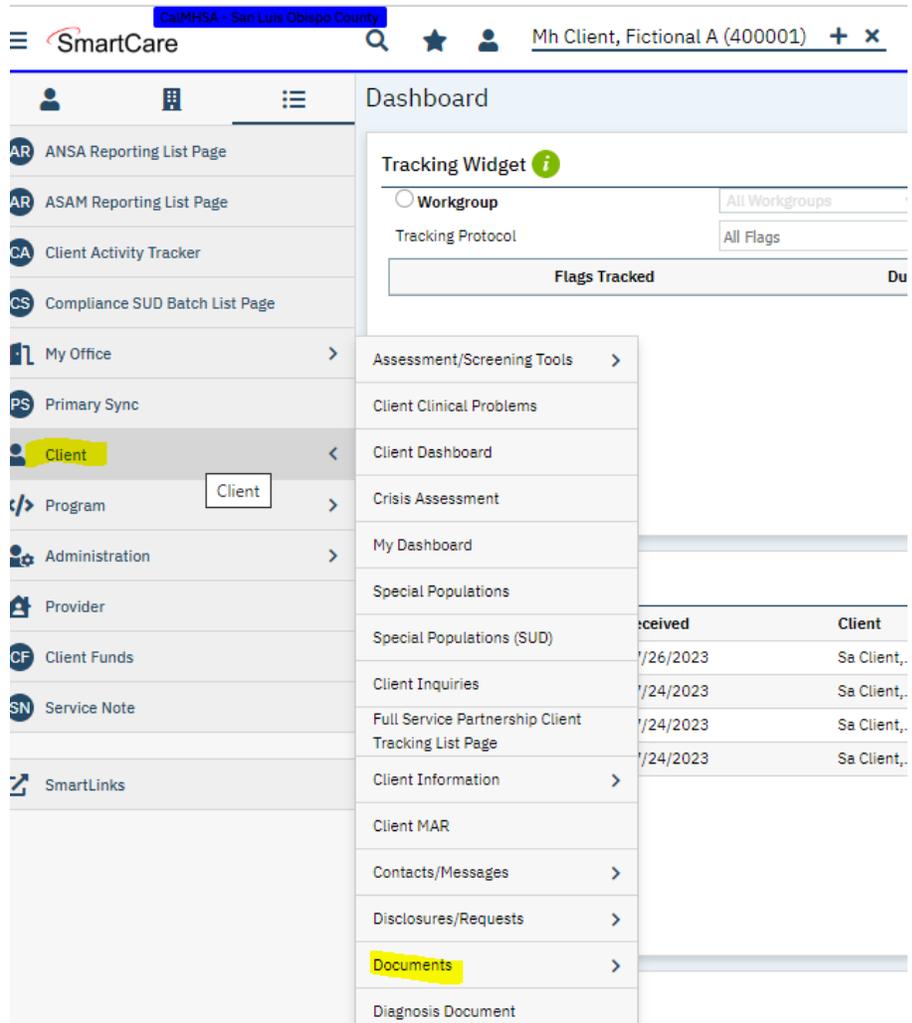


How to Associate A Progress Note with a Document

After the Program Supervisor, or designee, has reviewed a document or progress note in SmartCare, the Program Supervisor will complete a nonbillable service must document progress note to document the site authorization team determination. The Program Supervisor, or designee, will attach this Progress Note to the completed document or progress note by:

1. Open Documents List page



2. Find the document/progress note on the document list page and click **Add** under Associated Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
CalAIM Assessment		08/07/2023	Signed	1		Getten, Amanda Marga.			Yes	Add

- Click **Add** next to the non-billable service must document progress note you would like to associate with the CalAIM Assessment, verify the progress note is listed below on the List of Associated Documents, and click **OK**

Associate Documents (83) **OK** **Cancel**

Documents Preview

All Clinicians All Documents All Statuses **Apply Filter**

Effective From: 08/07/2022 Effective To:

Add All	Document	Effective	Status	Author
Add	Progress Note	08/07/2023	Signed	Getten, Amanda Margaret
Add	CalAIM Assessment	08/07/2023	Signed	Getten, Amanda Margaret
Add	Nutritional Screening	08/07/2023	Signed	Nibbio, Joanne Marie
Add	Pain Assessment	08/07/2023	Signed	Nibbio, Joanne Marie
Add	Transition of Care (CalMHSA)	08/04/2023	Signed	Getten, Amanda Margaret
Add	Progress Note	08/03/2023	Signed	Carlisle, Daniel
Add	Progress Note	08/03/2023	Signed	Masters, Amanda
Add	Progress Note	08/03/2023	Signed	Benadiba, Pamela Ann
Add	Release of Information	08/02/2023	Signed	Nibbio, Joanne Marie

List of Associated Documents

Document	Effective	Status	Author
X Progress Not...	08/07/2023	Signed	Getten, Aman...

Now, you will see this Progress Note and be able to click on the hyperlink to the Progress Note from the Documents List Page:

Documents (93) Create Document...

All Authors... All Documents All Statuses Due in X days Other **Apply Filter**

Last 1 Year Include errored documents From 08/07/2022 To 08/07/2023 Include External Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Progress Note / Client Non Billable Svc Must Docu...		08/07/2023	Signed	1		Getten, Amanda Marga.			Yes	Add
Pain Assessment		08/07/2023	Signed	1		Nibbio, Joanne Marie			Yes	Add
Nutritional Screening		08/07/2023	Signed	1		Nibbio, Joanne Marie			Yes	Add
CalAIM Assessment		08/07/2023	Signed	1		Getten, Amanda Marga.			Yes	Progress Note