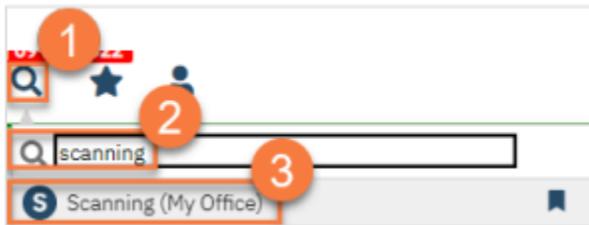


## How to Scan a Document into Client's Record

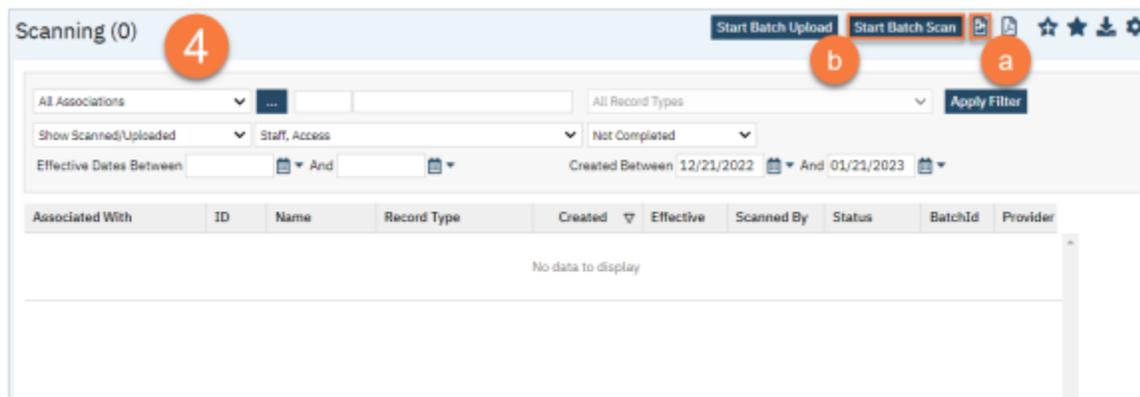
SmartCare search words in **bold**.

To scan, you need a scanner attached to your workstation. Scanning will use your scanner's software but save it in SmartCare.

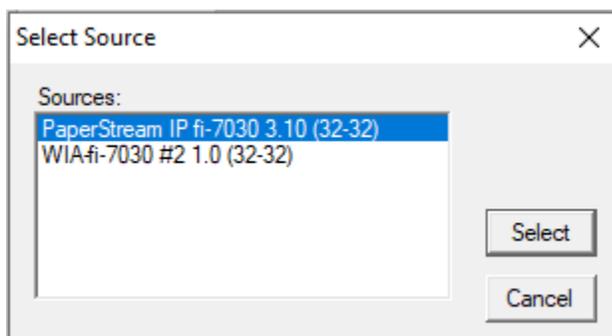
1. With the client record open, click the Search icon.
2. Type **Scanning** in the search bar.
3. Select **Scanning (My Office)** from the search results.



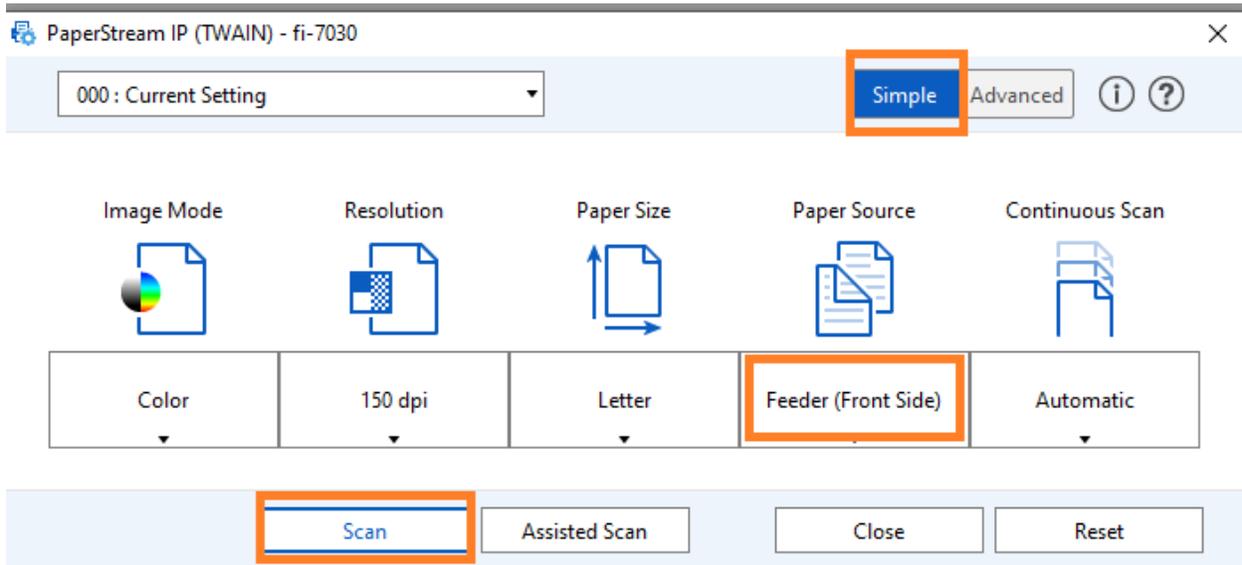
4. a. To scan a single document, click the "Scan New Images" icon.  
b. To scan multiple documents in a batch, click the "Start Scan Upload" button.



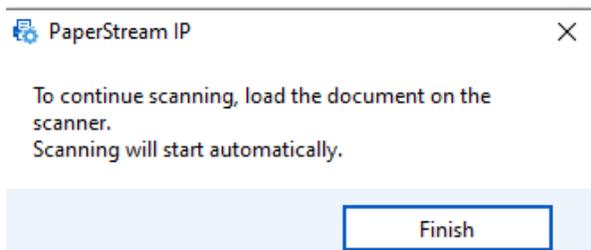
5. Select your scanner.



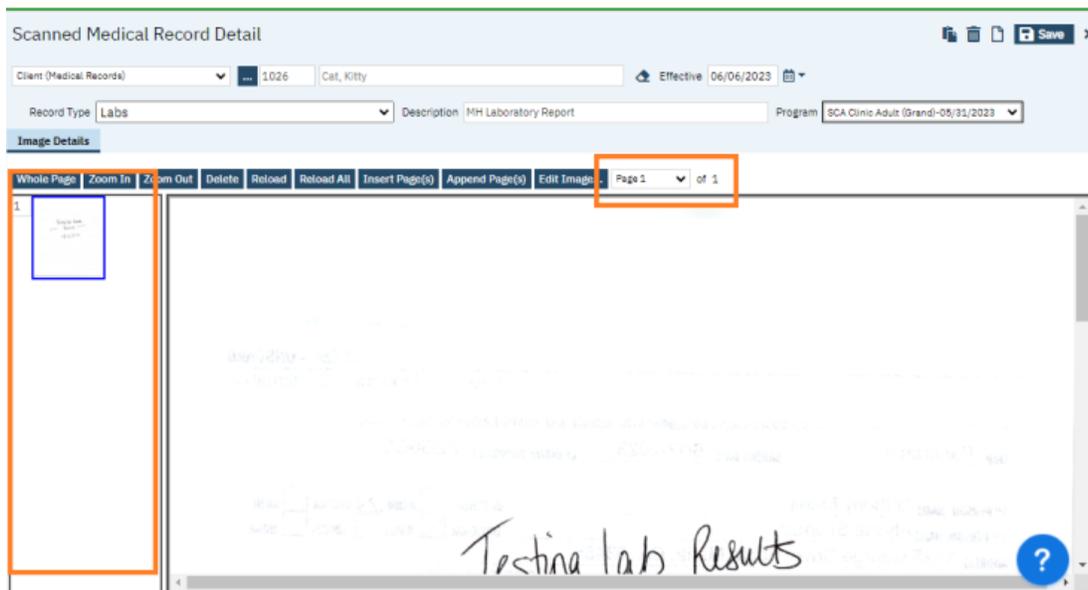
6. To scan a single sided document, insert the document face down into your scanner. In the Simple tab under Paper Source, select Feeder Front Side. Click Scan.



7. Select Finish when done.

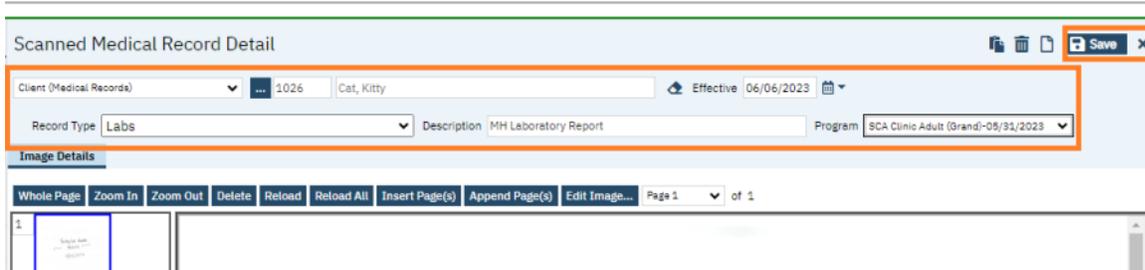


8. Ensure the document scanned correctly and all pages are visible.

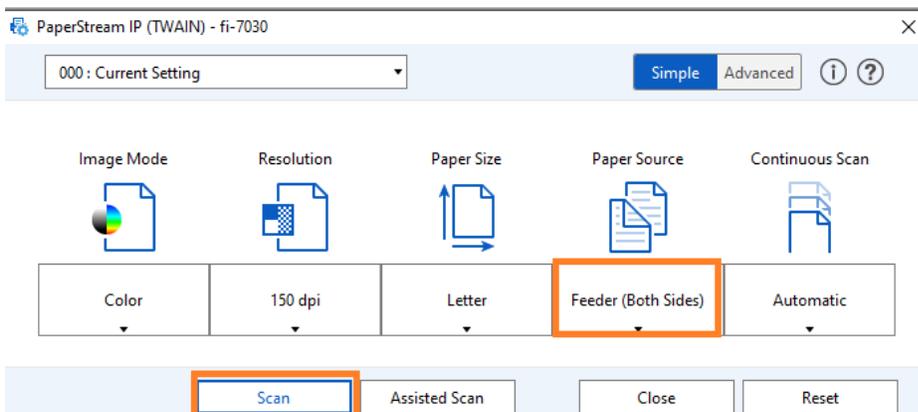


9. Select Client Medical Records. Ensure client MR# & Client Name auto fills. (If not, click the ellipsis button which will take you to the client search window.) Enter in effective date (date of document.) Select Record Type from the drop-down. Enter naming convention in the Description field. Select the Program. Click Save and X to close.

Note: we have asked CalMHSa to include our document types in the Record Type drop-down menu. (Admin/Correspondence, Hard Copy Signed Docs, Legal, etc.) We are awaiting their response.

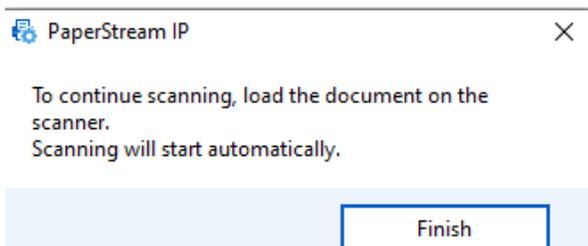


10. To scan a double sided document, insert the document face down into your scanner. In the Simple tab under Paper Source, select Feeder (Both Sides). Click Scan.



11. Select Finish when done.

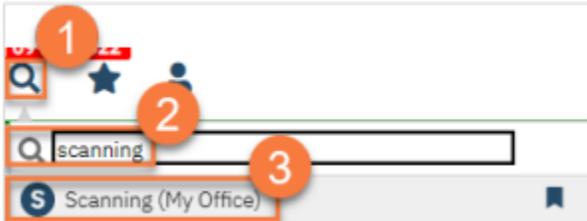
Note: For multi-page documents-when the document starts to scan, it will pull the last page of the document into the scanner first.



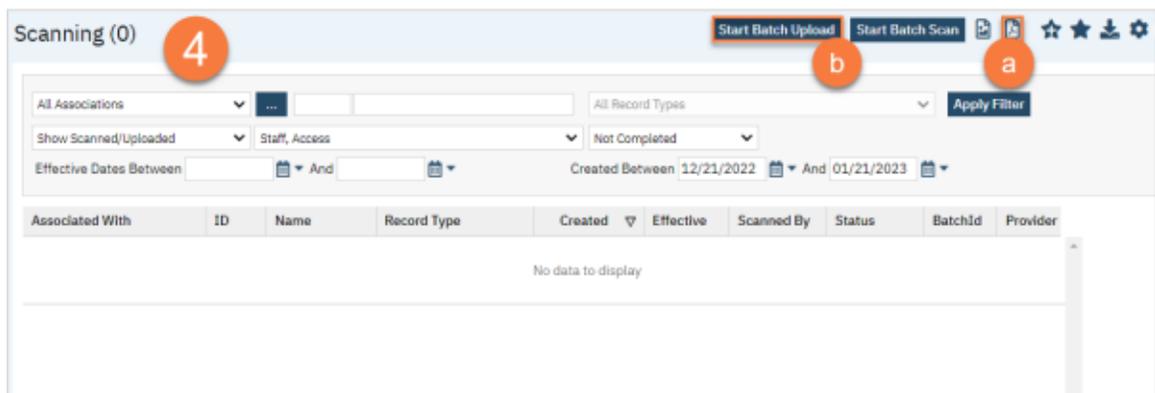
Follow steps 8 & 9 from above to attach the document to the client record.

## How to Scan a Document into Client's Record Without a Scanner

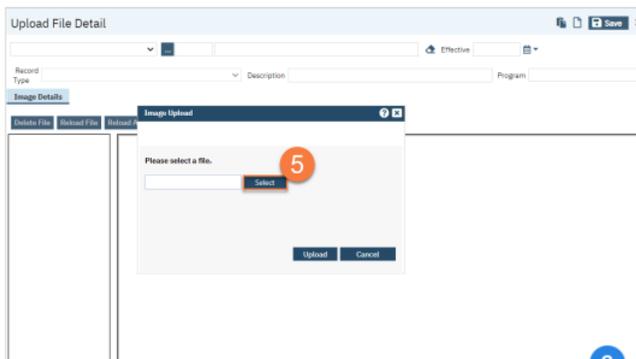
1. With the client open, click the Search icon.
2. Type **Scanning** in the search bar.
3. Select **Scanning (My Office)** from the search results.



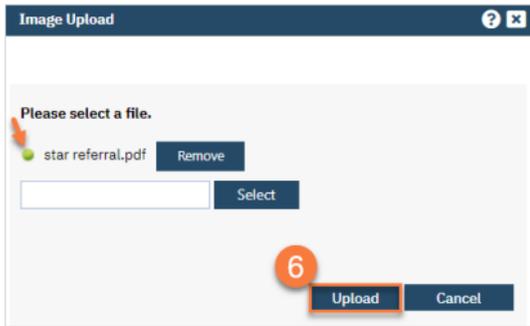
4. You can upload documents one at a time or as a batch.
  - a. To upload a single document, click the "Upload New Images" icon.
  - b. To upload multiple documents in a batch, click the "Start Batch Upload" button.



5. Choosing upload will open the Upload File Detail screen. This will include a pop-up. Click Select to find the file on your computer. (It must be a PDF.)



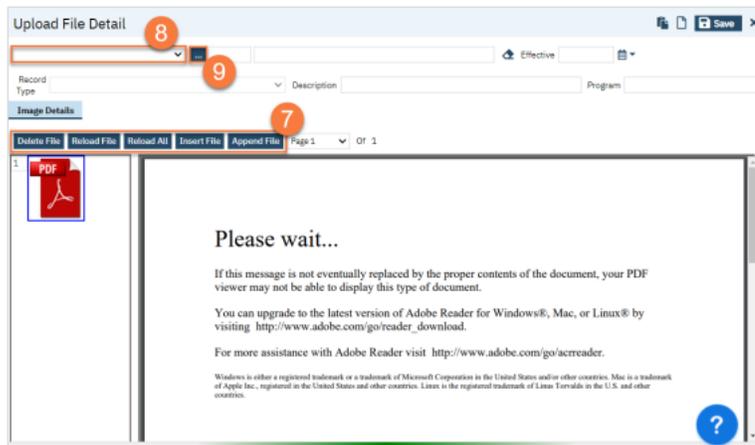
6. Once it's ready, a little green circle will appear next to it. Click Upload.



7. This will show you the PDF. Confirm you've uploaded the correct document. Make corrections as needed using the buttons at the top of the PDF viewer.

8. Select Client Medical Records from the first dropdown menu.

9. If you do not have the client record open, you can click on the ellipsis button to find the client. (The client search will open. Search to find the client. Click Select when you've located the client.)



10. Select the Record Type.

11. Enter the description of the document.

12. Enter the program the document is associated with.

13. Enter the Effective date of the document.

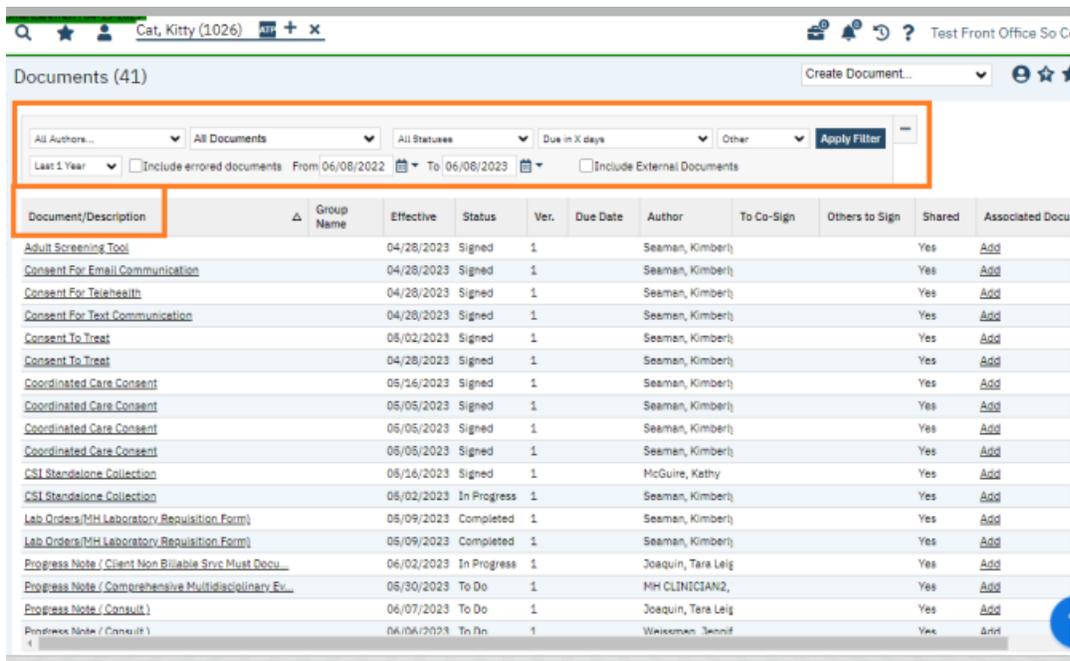
14. Click Save.



## How to view scanned documents in the record

We have found two ways to view scanned documents in the client's chart.

1. The first way is with the client open, search **Documents** and select **Documents (Client)**.

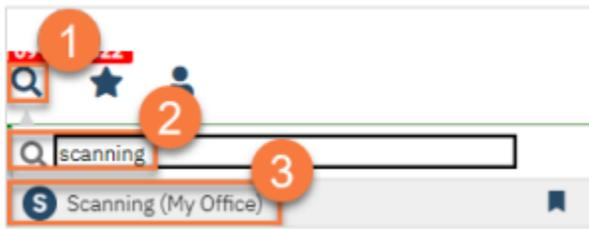


2. This will take you to a document list page which shows all documents (forms and scanned items in the client's record), where you can enter search parameters and click apply. You can sort the list alphabetically by clicking the Document/Description header. You can open a document by clicking on the document name.

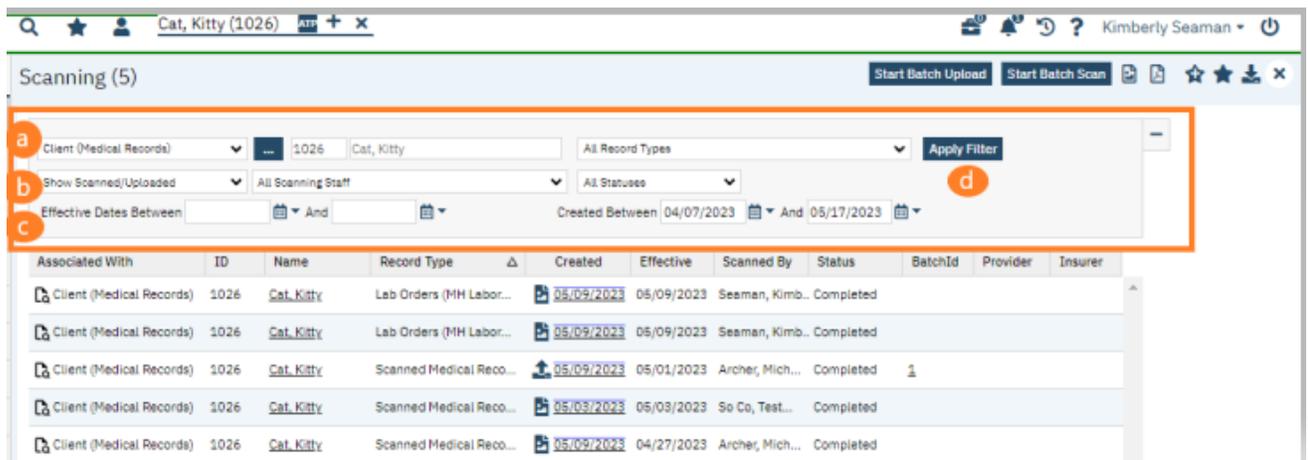
The second way to view scanned documents only:

1. With the client open, click the Search icon.

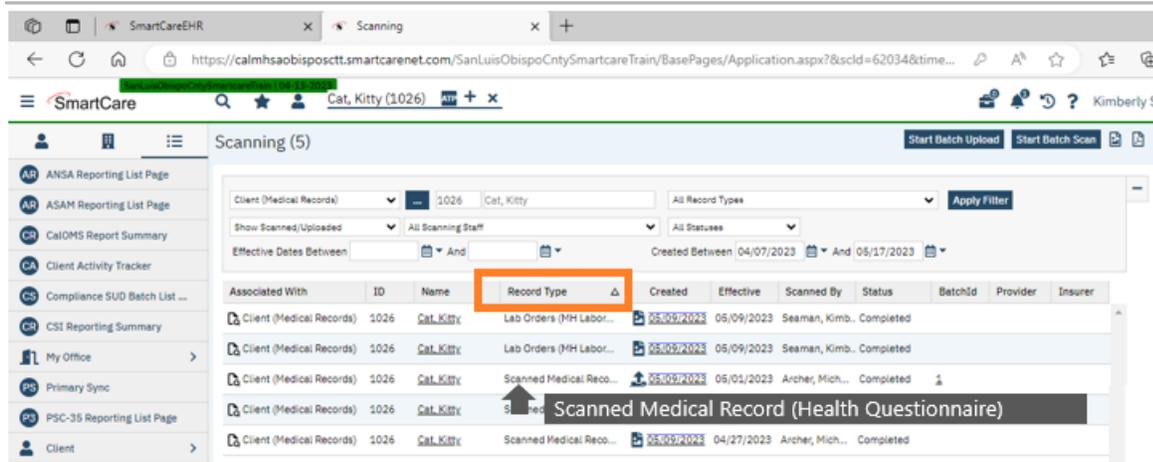
2. Type **Scanning** in the search bar.
3. Select **Scanning (My Office)** from the search results.



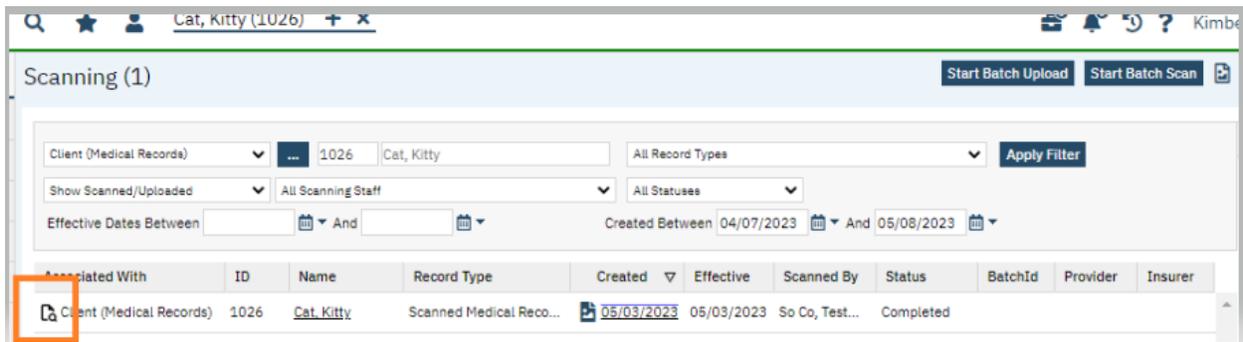
4. Set the parameters.
  - a. Select Client Medical Records in the All-Associations field. Ensure correct client is displaying; if not, click the ellipsis button to go to the client search screen. You can leave All Record Types or specify specific records you are searching for.
  - b. Ensure Show Scanned/Uploaded is selected in this field. In the All-Scanning Staff field, you can view documents scanned by all staff or individual staff. You can view all statuses or select completed or not completed.
  - c. You will need to enter either effective dates or created between dates to specify the date range you are looking for. (Similar to AZ's filters) Note: Effective date is the date of the document. Created date is the date the document was scanned into the record.
  - d. Once the parameters are set, click Apply Filter.



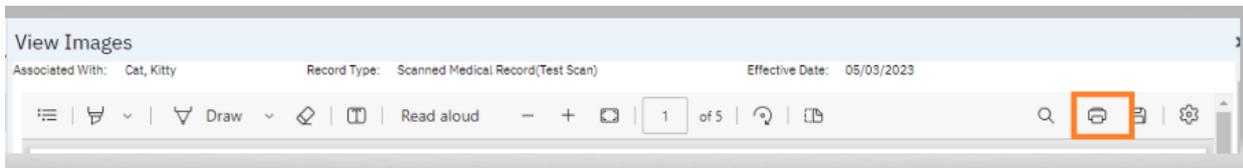
5. You can see the document description/ naming convention by placing your cursor over the name in the record type column.



6. You can view the scanned document by clicking on the document icon.



7. Once the scanned document opens, you can print the scanned document by selecting the print icon.



## How to attach scanned documents to SmartCare forms

1. With the client open, search **Documents**. Select **Documents (Client)**.
2. Locate the completed SmartCare form you want to associate a scanned document with.
3. Click the Add link in the Associated Documents column.

Documents (41) Create Document...

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

Last 1 Year  Include errored documents From 06/08/2022 To 06/08/2023  Include External Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Scanned Medical Record/BH Authorization to Disclos...		06/08/2023	Completed	1		So Co, Test Front			Yes	<a href="#">Add</a>
<a href="#">Release of Information</a>		06/08/2023	Signed	1		So Co, Test Front			Yes	<a href="#">Add</a>
Progress Note / Mental Health Assessment by Non-Ph...		06/08/2023	To Do	1		Joaquin, Tara Leig			Yes	<a href="#">Add</a>
Progress Note / Mental Health Assessment by Non-Ph...		06/07/2023	To Do	1		Joaquin, Tara Leig			Yes	<a href="#">Add</a>
Progress Note / Consult		06/07/2023	To Do	1		Joaquin, Tara Leig			Yes	<a href="#">Add</a>

4. The Associate Documents window will open. Locate the scanned document.

Associate Documents ?

Associate Documents (28) OK Cancel

Documents Preview

All Clinicians All Documents All Statuses Apply Filter

Effective From 06/08/2022 Effective To

Add All	Document	Effective	Status	Author
<a href="#">Add</a>	<a href="#">Release of Information</a>	06/08/2023	Signed	So Co, Test Front Office
<a href="#">Add</a>	<a href="#">Scanned Medical Record</a>	06/08/2023	Signed	So Co, Test Front Office
<a href="#">Add</a>	<a href="#">UMDAP Financial Assessment</a>	05/22/2023	Signed	So Co, Test Front Office
<a href="#">Add</a>	<a href="#">Release of Information</a>	05/18/2023	Signed	So Co, Test Front Office
<a href="#">Add</a>	<a href="#">Release of Information</a>	05/18/2023	Signed	So Co, Test Front Office
<a href="#">Add</a>	<a href="#">Release of Information</a>	05/17/2023	Signed	Seaman, Kimberly
<a href="#">Add</a>	<a href="#">Coordinated Care Consent</a>	05/16/2023	Signed	Seaman, Kimberly
<a href="#">Add</a>	<a href="#">CSI Standalone Collection</a>	05/16/2023	Signed	McGuire, Kathy
<a href="#">Add</a>	PSC-35 (California Pediatric			

5. Click on the document name to open and ensure it is the correct document you want. If it is correct, click the Documents tab.

Associate Documents ?

Associate Documents (28) OK Cancel

Documents Preview

Client: Cat, Kitty Effective Date: 06/08/2023 Author: So Co, Test Front Office Status: Signed

Read aloud 1 of 1

Client ID: 1026

*Kitty Cat 6/8/2023  
Hard copy signature for 6/8/2023 ROI*

6. Click Add. Click OK.

Associate Documents (28)

Documents Preview

All Clinicians All Documents All Statuses Apply Filter

Effective From 06/08/2022 Effective To

Add All	Document	Effective	Status	Author
Add	<a href="#">Release of Information</a>	06/08/2023	Signed	So Co, Test Front Office
Add	<a href="#">Scanned Medical Record</a>	06/08/2023	Signed	So Co, Test Front Office
Add	<a href="#">UMDAP Financial Assessment</a>	05/22/2023	Signed	So Co, Test Front Office
Add	<a href="#">Release of Information</a>	05/18/2023	Signed	So Co, Test Front Office
Add	<a href="#">Release of Information</a>	05/18/2023	Signed	So Co, Test Front Office
Add	<a href="#">Release of Information</a>	05/17/2023	Signed	Seaman, Kimberly
Add	<a href="#">Coordinated Care Consent</a>	05/16/2023	Signed	Seaman, Kimberly
Add	<a href="#">CSI Standalone Collection</a>	05/16/2023	Signed	McGuire, Kathy
...	<a href="#">PSC-35 (California Pediatric</a>	05/16/2023	Signed	McGuire, Kathy

List of Associated Documents

7. This will take you back to the Documents screen and the Associated Document will be shown. You can click the on the associated document name to view the scanned document.

Documents (41)

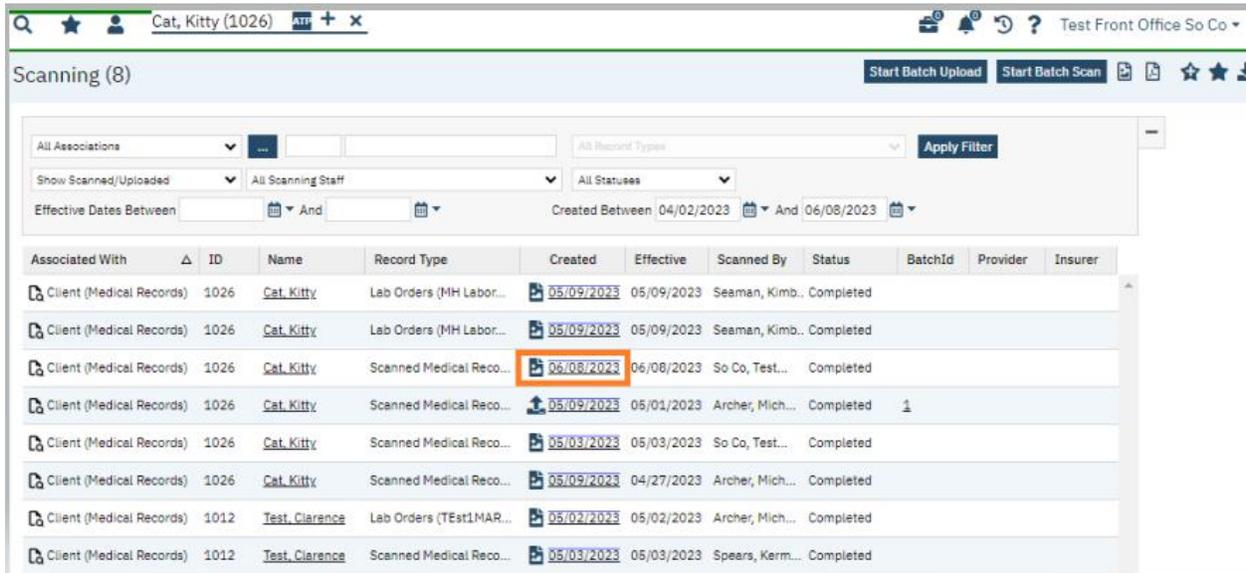
Create Document...

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

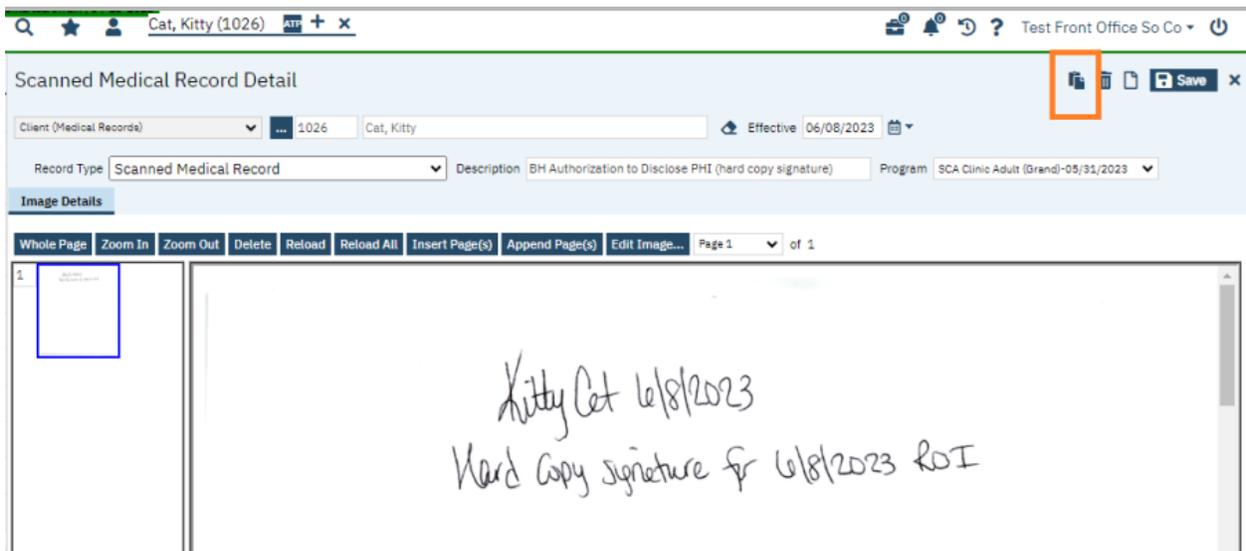
Last 1 Year Include errored documents From 06/08/2022 To 06/08/2023 Include External Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
<a href="#">Scanned Medical Record/BH Authorization to Disclos...</a>		06/08/2023	Completed	1		So Co, Test Front			Yes	<a href="#">Add</a>
<a href="#">Release of Information</a>		06/08/2023	Signed	1		So Co, Test Front			Yes	<a href="#">Scanned Medical Record</a>
<a href="#">Progress Note / Mental Health Assessment by Non-Ph...</a>		06/08/2023	To Do	1		Joquin, Tara Leig			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Mental Health Assessment by Non-Ph...</a>		06/07/2023	To Do	1		Joquin, Tara Leig			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Consult</a>		06/07/2023	To Do	1		Joquin, Tara Leig			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Consult</a>		06/06/2023	To Do	1		Weissman, Jennif			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Consult</a>		06/03/2023	To Do	1		Weissman, Jennif			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Client Non Billable Srvs Must Docu...</a>		06/02/2023	In Progress	1		Joquin, Tara Leig			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Comprehensive Multidisciplinary Ev...</a>		05/30/2023	To Do	1		MH CLINICIAN2,			Yes	<a href="#">Add</a>
<a href="#">Progress Note / Consult</a>		05/25/2023	To Do	1		MH CLINICIAN, T			Yes	<a href="#">Add</a>

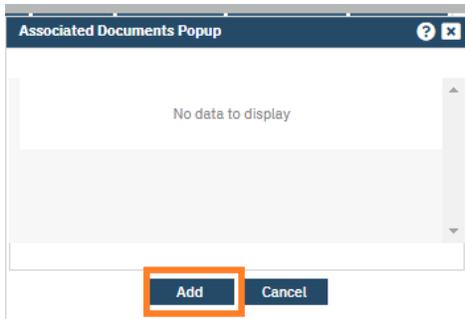
8. If you want to attach one scanned document to multiple completed forms, you will go to **Scanning (My Office)**. Locate the scanned document and click on the created date.



9. The Scanned Medical Detail screen will open. Click on the Associate Documents icon.



10. A pop-up will open. Click Add.



11. The Associate Documents screen will open. Click on the form name and ensure it is the correct form you want.

Associate Documents (31)

Documents Preview

All Clinicians All Documents All Statuses Apply Filter

Effective From 06/08/2022 Effective To

Add All	Document	Effective	Status	Author
Add	<b>Release of Information</b>	06/08/2023	Signed	So Co, Test Front Office
Add	Scanned Medical Record	06/08/2023	Signed	So Co, Test Front Office
Add	Progress Note	06/02/2023	In Progress	Joaquin, Tara Leigh
Add	Referral Document	05/25/2023	In Progress	Seaman, Kimberly
Add	UMDAP Financial Assessment	05/22/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/17/2023	Signed	Seaman, Kimberly
Add	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly

List of Associated Documents

Document	Effective	Status	Author
No data to display			

12. If it is correct, click the Documents tab.

Associate Documents (31)

Documents Preview

Client: Cat, Kitty Effective Date: 06/08/2023 Author: So Co, Test Front Office Status: Signed

Client ID: 1026 Released To/From: Worker, Social

**AUTHORIZATION TO OBTAIN/DISCLOSE PROTECTED HEALTH INFORMATION**

**Client Information**

**Client Name:** Cat, Kitty **Client ID:**

**DOB:** 04/26/2001 **Effective I**

**Program:** SCA Clinic Adult (Grand)

**General**

The County Behavior Health Services abides by all federal and state confidentiality laws including HIPAA (Portability & Accountability Act) and 42 C.F.R. Part 2. By signing this authorization, I acknowledge and

13. Click the Add button next to the form. It will now be displayed in the List of Associated Documents section.

Associate Documents (31)

Documents | Preview

All Clinicians | All Documents | All Statuses | Apply Filter

Effective From: 06/08/2022 | Effective To: [ ]

Add All	Document	Effective	Status	Author
Add	Release of Information	06/08/2023	Signed	So Co, Test Front Office
Add	Scanned Medical Record	06/08/2023	Signed	So Co, Test Front Office
Add	Progress Note	06/02/2023	In Progress	Joaquin, Tara Leigh
Add	Referral Document	05/25/2023	In Progress	Seaman, Kimberly
Add	UMDAP Financial Assessment	05/22/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/17/2023	Signed	Seaman, Kimberly
Add	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly

List of Associated Documents

Document	Effective	Status	Author
X Release of I...	06/08/2023	Signed	So Co, Test...

14. You may repeat these steps to add the scanned document to multiple forms. Once done, click OK.

Associate Documents (31)

Documents | Preview

All Clinicians | All Documents | All Statuses | Apply Filter

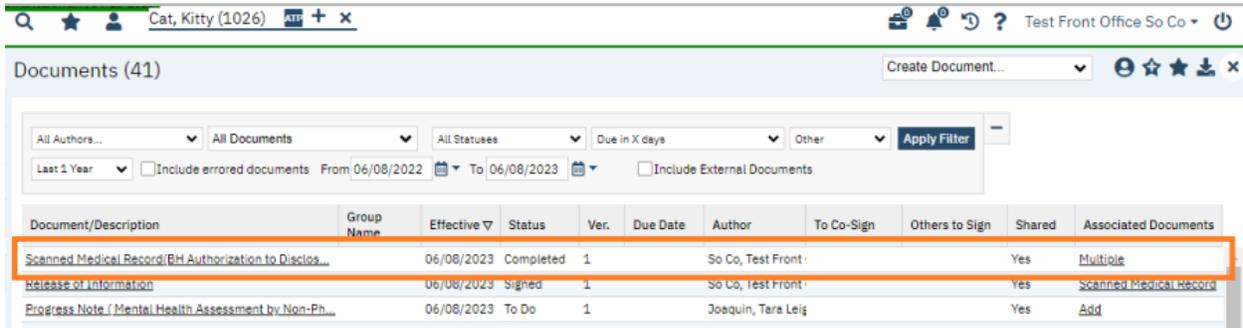
Effective From: 06/08/2022 | Effective To: [ ]

Add All	Document	Effective	Status	Author
Add	Release of Information	06/08/2023	Signed	So Co, Test Front Office
Add	Scanned Medical Record	06/08/2023	Signed	So Co, Test Front Office
Add	Progress Note	06/02/2023	In Progress	Joaquin, Tara Leigh
Add	Referral Document	05/25/2023	In Progress	Seaman, Kimberly
Add	UMDAP Financial Assessment	05/22/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/18/2023	Signed	So Co, Test Front Office
Add	Release of Information	05/17/2023	Signed	Seaman, Kimberly
Add	Coordinated Care Consent	05/16/2023	Signed	Seaman, Kimberly

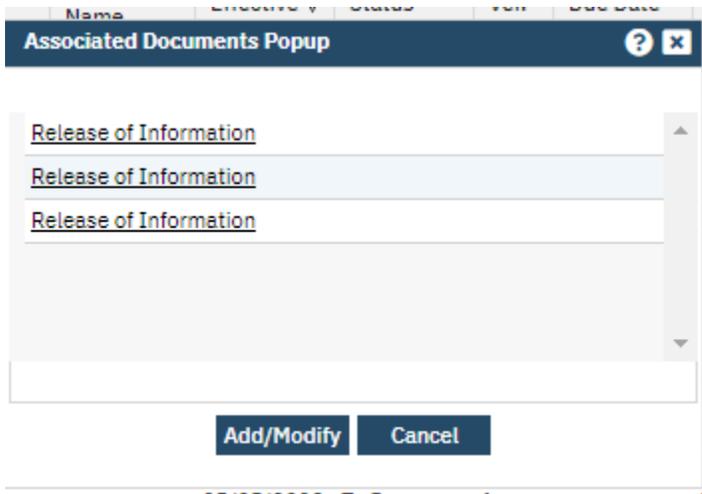
List of Associated Documents

Document	Effective	Status	Author
X Release of I...	06/08/2023	Signed	So Co, Test...
X Release of I...	05/18/2023	Signed	So Co, Test...
X Release of I...	05/18/2023	Signed	So Co, Test...

15. X out to close the Scanned Medical Record Detail screen. Go to **Documents (Client)** and this is how it will display.



16. If you click the Multiple link in the Associated Documents column, a pop-up will display showing the associated forms. You can click to open each form.



## How to remove associated documents from SmartCare forms (if attached in error)

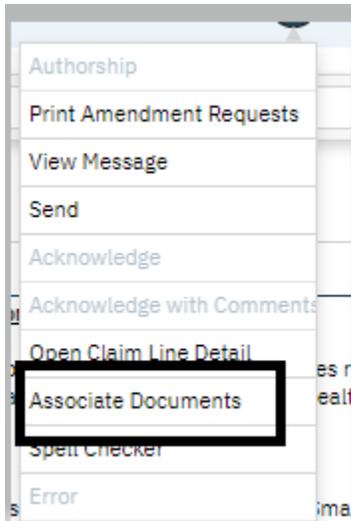
1. In the Documents screen, click on the document/description.

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Documents
Progress Note / Client Non Billable Svcs Must Docu...		07/11/2023	To Do	1		Yarnold, Katelyn F			Yes	<a href="#">Add</a>
<b>Coordinated Care Consent</b>		07/11/2023	In Progress	1		Seaman, Kimberli			Yes	<a href="#">Progress Note</a>
Progress Note / Psychosocial Rehabilitation Group...	Music Sheri...	07/10/2023	Signed	1		Novikoff, Danica			Yes	<a href="#">Add</a>

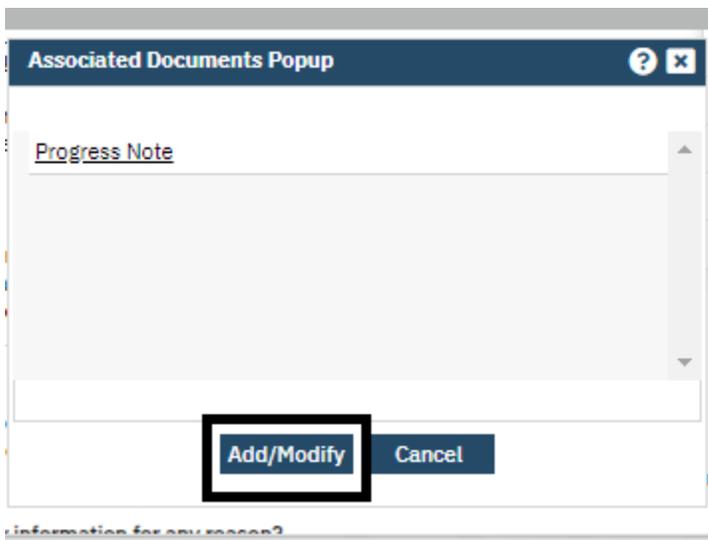
2. Click this icon.



3. Select Associated Documents.



4. Click Add/Modify.



5. Click the X to remove.

Associate Documents (8) [OK] [Cancel]

Documents | Preview

All Clinicians | All Documents | All Statuses | [Apply Filter]

Effective From: 07/11/2022 | Effective To:

Add All	Document	Effective	Status	Author
Add	Progress Note	07/10/2023	Signed	Novikoff, Denica
Add	Progress Note	07/09/2023	Signed	Bouskos, Jordan
Add	Progress Note	07/07/2023	Signed	Novikoff, Denica
Add	Progress Note	07/07/2023	Signed	Novikoff, Denica
Add	Progress Note	07/06/2023	Signed	Novikoff, Denica
Add	Progress Note	07/06/2023	Signed	Katherman, Charles Morris
Add	Progress Note	07/05/2023	Signed	Johnson, Julia Dannon
Add	CCD_MH	06/15/2023	Signed	Provider, Conversion

List of Associated Documents

Document	Effective	Status	Author
X Progress Not...	07/10/2023	Signed	Novikoff, De...

6. Click OK.

Confirmation Message [X]

? Do you want to delete this record?

[OK] [Cancel]

7. Then click OK in the Associated Documents screen.

The screenshot shows the 'Associate Documents' interface. At the top right, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangular box. Below the buttons, there are filter options for 'All Clinicians', 'All Documents', and 'All Statuses', along with an 'Apply Filter' button. There are also 'Effective From' and 'Effective To' date pickers. The main area contains a table with columns: 'Add All', 'Document', 'Effective', 'Status', and 'Author'. The table lists several documents, including 'Coordinated Care Consent' and multiple 'Progress Note' entries. Below the table is a section titled 'List of Associated Documents' which currently displays 'No data to display'.

8. X to close the document.

The screenshot shows the 'Coordinated Care Consent' document view. At the top, there is a browser-like header with a search icon, a star, a user profile, and the text 'Generic-1, Non-Slo (490001) + x'. On the right side of the header, there are several icons, including a power icon and a close icon (X) which is highlighted with a red rectangular box. Below the header, the document title 'Coordinated Care Consent' is displayed. The document content includes fields for 'Effective' (07/11/2023), 'Status' (In Progress), and 'Author' (Seaman, Kimberly). A 'General' tab is selected, showing the document title and a paragraph of text: 'By signing this form below, you will allow certain organizations and individuals to use and share your health and other personal information related to your treatment and care. They will be able to share your information through an electronic health record system maintained by the Health Services Authority called SmartCare.' A context menu is open over the document content, listing options such as 'Authorship', 'Print Amendment Requests', 'View Message', 'Send', 'Acknowledge', 'Acknowledge with Comment', 'Open Claim Line Detail', and 'Associate Documents'.