

Provider Inquiries Tip Sheet

This Tip Sheet will walk users through how to enter and view inquiries. This Tip Sheet may change as our trainings and systems are updated. Please visit our website [BHS EHR \(saccounty.gov\)](https://saccounty.gov) for the most updated version. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

Contents

Inquiries Information	2
New Inquiries from Access or SOC.....	2
New Inquiries when the client comes directly to your program	5
Inquiries for an existing client.....	9
Viewing Dispositions	10
Editing Dispositions.....	11
Dispositioning an inquiry on behalf of a clinician	12
Sending an Inquiry to a separate agency	12

Inquiries Information

An inquiry is used to request services into a program. This can be done for new clients or existing clients. An inquiry should be done before a client enrolls into your program or when you are requesting they be enrolled into a different program.

Inquiry for a New Client

There will be two types of inquiries for new clients.

1. The client goes through Access or System of Care (SOC) and they refer them to your program. In this circumstance, the inquiry will be completed by Access or SOC. If the request is approved, a request for enrollment into your program will be sent.
2. The client comes directly to your program requesting services. In this circumstance, you are able to start the inquiry and assign it to a clinician at your agency to disposition. An inquiry is still required to be completed for all clients. Complete the disposition for the new client and enroll them into your agency if appropriate.

New Inquiries from Access or SOC

1. Search “Program Assignments (Program)” to open the Program Assignments list page.
2. Use your filters and search your program in “All Programs” and “Requested” for “All Statuses”, click Apply Filter. This will show all pending requests that have been sent from Access or SOC.
3. Click on the “Requested” hyperlink to open the screen.


Program Assignments (2) 🔍 ⭐ ⭐ ⬇️ 📄 ⚙️

APCC-TWC-14th Ave(34CNPZ) ▾
Requested ▾
All Program Managers ▾
Apply Filter

All Program Views ▾
All Clinicians ▾
From 03/18/2023 📅 ▾
To 06/18/2023 📅 ▾
Other ▾

Priority	Client Name	△ Status	Date Requested	Date Enrolled	Date Discharged	Program	Primary	Primary Clinician	Prerequisite	Comr
	Test, Jessica (1085)	Requested	06/12/2023			APCC-TWC-1...	No			
	Test, Mary (1099)	Requested	06/15/2023			APCC-TWC-1...	No			

4. Once the page is open you can view any comments SOC or Access may have entered.
5. Switch the Current Status from “Requested” to “Enrolled”. Enter the “Enrolled” date.

Current Status Requested 

Requested Date


- Requested
- Enrolled**
- Discharged

6. Click "Save" & "Close" once complete.


Program Assignment Details Save x

Program Assignment


General


Program Name: APCC-TWC-14th Ave(34CNPZ) Primary Current Status: Enrolled 


Client...: Test, Jessica

Assigned Staff: 


Comment: comments may be [here](#).

Requested Date: 06/12/2023 

Enrolled Date: 06/18/2023 





Discharged Date: 



Next Schedule Service




7. If you would like to see additional information regarding the inquiry you can go to Client Inquiries (Client), look up the new client and view the details of the inquiry. Please note, you may need to change the date range to view the information.

Client Inquiries (1)

Recorded By All  Assigned To All  All Dispositions  All Statuses  Apply Filter

From 05/24/2023  To 06/18/2023 

Inquirer	Date/Time 	Recorded By	Assigned To	Disposition	Inquiry Status
Test, Scarlett	06/08/2023 1:2...	Trainer, Four			In Progress

8. Click on the Date/Time hyperlink to open the inquiry.

- From here, you can view the details of inquiry entered by Access or SOC, including disposition comments.

Inquirer Information Crisis

Relation To Client: First Name: Middle Name: Last Name:
 Call Back: Ext: Email:
 Start Date: Start Time:

Client Information (Potential)

First Name: Middle Name: Last Name: Client ID: Sex:
 SSN: SSN Unknown/Refused DOB: Age (23 Years)
 Home Phone: Cell: Email:
 Address1: Urgency Level: i
 Address2: Inquiry type:
 City: Contact type:
 State: Zip:

Presenting Problem:

Current Client Information (If any)

Client Id: 1049
Last Inquiry Date: 05/16/23

Coverage History
No Coverage History

Disposition

[Add Provider](#)
[Add Service Type](#)

Assigned Staff: Assigned WorkGroup:

Disposition Comments

[Add Disposition](#)

End Date: End Time: Status:

New Inquiries when the client comes directly to your program

1. Search “Inquiries (My Office)”. A list page of all inquiries will open. Select the “New” icon. Make sure you do not already have a client selected. If a client is already selected, the inquiry will open for that existing client.

Inquiries (86)

Recorded By All Assigned To All Dispositions All Status All Inquiry Type Apply Filter

All Programs All Locations All Urgency Level All Contact Type

From 01/01/1900 To 12/31/9999 Last Name First Name Phone

Client (Potential)	Client Id	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location
Testy, One		Testy, One	6/16/2023 2:22 PM	Taylor, Eryca		Referred to inter...	In Progress		
Tester, John	1007	Tester, John	6/15/2023 10:45 AM	Miller, Justin	Trainer, Four		In Progress		
Test, Mary	1099	Test, Mary	6/15/2023 9:19 AM	Trainer, Four	Trainer, Four		In Progress	SacCo - Access -	

2. A client search box will open. Enter the potential clients last and first name. Click “Broad Search” to specifically search that client. If they do not populate at the bottom, you can click “Broad Search” to search anyone with a similar name. If you still do not see the client, click “Inquiry (New Client)”.

Client Search

Clear No Search Records Found

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

Broad Search Narrow Search Type of Client Individual Organization

Last Name Test First Name Luke Program

Other Search Strategies

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
No data to display								

Select Cancel

Inquiry (New Client)

1. Fill in the Client Information section with information regarding that inquiry. Make sure to address all items below. For billing purposes, the Sex chosen on this screen must match the client’s sex listed on the Medi-Cal website.

Client Information (Potential)

First Name	<input type="text" value="Luke"/>	Middle Name	<input type="text"/>	Last Name	<input type="text" value="Test"/>	Client ID	<input type="text"/>	Sex	<input type="text" value="Male"/>
SSN	<input type="text" value="123-33-3333"/>	<input type="checkbox"/> SSN Unknown/Refused	DOB	<input type="text" value="05/05/2005"/>	Age (18 Years)				
Home Phone	<input type="text" value="(916) 555-7777"/>	Cell	<input type="text"/>	Email	<input type="text"/>				
Address1	<input type="text" value="123 Home Way"/>			Urgency Level	<input type="text" value="Not urgent"/>				
Address2	<input type="text"/>			Inquiry type	<input type="text" value="Request for MH services"/>				
City	<input type="text" value="Sacramento"/>			Contact type	<input type="text" value="Call"/>				
State	<input type="text" value="California"/>	Zip	<input type="text" value="95823"/>						

Presenting Problem

Enter presenting problems/reason for [inquiry](#)

Current Client Information (If any)

2. In the “Inquiry Handled By” section, select your program and assign the inquiry to a clinician at your agency. This will be an internal process for each agency to determine who will disposition inquiries.

Inquiry Handled By

Recorded By	<input type="text" value="Trainer, Four"/>	Information Gathered By	<input type="text" value="Trainer, Four"/>
Program	<input type="text" value="APCC-TWC-14th Ave"/>	Gathered By Other	<input type="text"/>
Location	<input type="text"/>	Assigned To	<input type="text" value="Miller,Justin"/>

- At the top of the screen there are two additional tabs, Insurance and Demographics. The Insurance tab will allow you to verify the clients Medi-Cal eligibility. Enter the **CIN** Number under Insurance ID and click verify. The “Coverage Information” will allow you to enter payors into the coverage section. If the client is enrolled, you will still need to go to the coverage screen to add the payors. Because of this, the bottom section is not required to be filled out at this time.

Initial **Insurance** Demographics

Electronic Eligibility Verification

Payer: Medi-Cal Insurance Id: 123456789F Verify...

Request Start/End Date	Plan	Verified On	Response	Insured Id	Plan Start Date	Plan End Date

Coverage Information Show Current Plans Only

Plan	Insured ID	Group ID	Comment
× Medi-Cal MH	91234595A		

Add

- The Demographics tab is not required to be filled out in order to save the inquiry; however, we recommend entering at least the top two sections of the screen, “Identifying Information” and “Language”. In these sections, you can enter the client’s gender identity and pronouns as well as indicate if they need an interpreter. Use the Identifying Information field if the client’s gender identity is different than their sex at birth.

Identifying Information (Optional)

Gender Identity: Male Pronoun: He Sexual Orientation: Prefer not to answer

Language

Primary/Preferred Language: Spanish Client does not speak English Interpreter Services Needed

- Once you have completed your inquiry, click the “Save” button at the top right. If you want to go back to the list page, click the X to close, or click the SmartCare button on the upper left to go back to the home screen.

The screenshot shows the 'Inquiry Details' page in the SmartCare system. At the top left, the 'SmartCare' logo is highlighted with a red box. At the top right, the 'Save' button is highlighted with a red box. The form contains several sections: 'Identifying Information (Optional)' with dropdowns for Gender Identity (Male), Pronoun (He), and Sexual Orientation (Prefer not to answer); and 'Language' with a dropdown for Primary/Preferred Language (Spanish) and checkboxes for 'Client does not speak English' and 'Interpreter Services Needed'.

- After the inquiry has been created, the assigned clinician can go into the inquiry and disposition after determining whether the client meets medical necessity. The clinician can search “Inquiries (My Office)” and set their filters to show inquiries that have been assigned to them and are still in progress. The clinician will select their name from the “Assigned to All” drop down and select “In Progress” under the “All Status” drop down. Click “Apply Filter”. Click the “Start Date/Time” hyperlink to open the inquiry.

The screenshot shows the filter interface and a table of inquiries. The filter section includes dropdowns for 'Recorded By All' (Trainer, Four), 'All Dispositions' (In Progress), and 'All Inquiry Type' (All Inquiry Type), with an 'Apply Filter' button. Below the filters is a table with the following data:

Client (Potential)	Client Id	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Prog
Tester, John	1007	Tester, John	6/15/2023 10:45 AM	Miller, Justin	Trainer, Four		In Progress	
Parker, Peter	1027	Parker, Peter	4/26/2023 4:12 PM	Cortiz, Silvia	Trainer, Four		In Progress	
Test, Tim	1048	Test, Tim	5/15/2023 11:18 AM	Hernandez, Janet	Trainer, Four	Referred to inter...	In Progress	El Ho

- The clinician can select their name from the “Information Gathered by” drop-down.

The screenshot shows a form with three rows of dropdown menus. The first row is 'Recorded By' with 'Miller, Justin' selected. The second row is 'Information Gathered By' with 'Trainer, Four' selected. The third row is 'Assigned To' with 'Trainer, Four' selected. The 'Information Gathered By' dropdown is highlighted with a red box.

- Under the Disposition section, select the disposition and service type. Enter the End date and time of your disposition and mark it as Complete. Save your changes.

Disposition

Select Provider/Agency

[Add Provider](#)

[Add Service Type](#)

Assigned Staff Assigned WorkGroup

Disposition Comments

[Add Disposition](#)

End Date End Time Status

Inquiries for an existing client

If your current client is needing TBS services, psych testing, or a transfer you should send an inquiry to Access or SOC for that existing client. Search for your client.

- Search “Client Inquiries (Client)”. You are able to view any previous inquiries entered for that client here. Please note, if you do not see any listed you may need to adjust the date range. To enter a new inquiry, click the New button.

Client Inquiries (0)

Recorded By All Assigned To All All Dispositions All Statuses

From To

Inquirer	Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status
No data to display					

- Enter the details of your inquiry as you did in the previous process. Make sure to specify in the comments what you are requesting. For example TBS services, lateral transfer, step up or step down, etc.

- Under "Inquiry Handled By" select your program and under "Assigned To" select *Access, Clinician for a mental health request or *SOC, Clinician for a SUPT request. Save and close the inquiry once complete.

Inquiry Handled By

Recorded By: Trainer, Four
 Information Gathered By: Trainer, Four
 Program: Test Program
 Location: [Empty]
 Gathers By Other: [Empty]
 Assigned To: [Dropdown menu with options: *Access, Clinician; *SOC, Clinician]

Disposition

Viewing Dispositions

- With no clients selected search "Inquiries (My Office)"
- On the list page change your filters to show your program, all dispositions, the date range you want to view, and Complete. Click Apply Filter. This will show all completed dispositions. You can click on the hyperlink to view the details of that disposition.

Inquiries (4)

Recorded By All | Assigned To All | All Dispositions | Complete | All Inquiry Type | **Apply Filter**

SacCo-Mobile Crisis (34P8) | All Locations | All Urgency Level | All Contact Type

From 01/01/1900 To 12/31/9999 | Last Name | First Name | Phone

Client (Potential)	Client Id	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Prog
[Redacted]	[Redacted]	[Redacted]	6/9/2023 8:45 PM	[Redacted]	[Redacted]	Information Only	Complete	SacCo
[Redacted]	[Redacted]	[Redacted]	6/12/2023 12:00 AM	[Redacted]	[Redacted]	Information Only	Complete	SacCo
[Redacted]	[Redacted]	[Redacted]	6/9/2023 8:31 PM	[Redacted]	[Redacted]	Information Only	Complete	SacCo
[Redacted]	[Redacted]	[Redacted]	6/9/2023 8:31 PM	[Redacted]	[Redacted]	Information Only	Complete	SacCo

Editing Dispositions

1. If a mistake was made or more information needs to be added to the inquiry you can open the existing inquiry and make any necessary updates. If any updates are made, make sure to update the date/time of the inquiry. You'll also want to make sure it is still assigned to Access or SOC and that the status is showing as in process.

Inquiry Details

[Remove Client Link](#) | [Link/Create Client](#) | [Register Client](#) | | | | | |

Initial | Insurance | Demographics

Inquirer Information Crisis

Relation To Client: Provider | First Name: Christina | Middle Name: | Last Name: Irizarry

Call Back: (916) 662-1542 | Ext: | Email: irizarryc@sacounty.gov

Start Date: 06/09/2023 | Start Time: 8:45 PM | Now

Inquiry Handled By

Recorded By: Irizarry, Christina | Information Gathered By: Trainer, Four

Program: SacCo-Mobile Crisis (34P8) | Gathered By Other:

Location: | Assigned To: *Access, Clinician

Disposition

Individual refused service or referral

[Add Service Type](#)

Assigned Staff: | Assigned WorkGroup:

Disposition Comments: not enough information to process.

[Add Disposition](#)

End Date: 06/09/2023 | End Time: 8:46 PM | Now | Status: Complete

Complete
In Progress

If an Inquiry does not have enough information entered, Access or System of Care may send it back to you for edits. In this case they will change the disposition to "Information Only". You can then follow the steps outlined above to update the inquiry.

Dispositioning an inquiry on behalf of a clinician

Admin staff are able to enter the disposition on behalf of the clinician. This may happen with agencies who use their own EHR and the clinical staff may not have access to SmartCare. For these inquiries you will follow the same process as outlined above. The only difference will be under the “Inquiry Handled By” section you will specify the clinician who gathered the information. In the example below, the person who recorded the inquiry (admin staff) is different from the person who gathered it (clinical Staff). If the clinician is not on the drop-down list you can manually enter their name in the “Gathered By Other” field right below.

Inquiry Handled By

Recorded By	<input type="text" value="Miller,Justin"/>	▼	Information Gathered By	<input type="text" value="Harris,Kathleen"/>	▼
Program	<input type="text" value="APCC-TWC-14th Ave"/>	▼	Gathered By Other	<input type="text"/>	
Location	<input type="text"/>	▼	Assigned To	<input type="text" value="Harris,Kathleen"/>	▼

Sending an Inquiry to a separate agency

If a client comes directly to your program and you are unable to enroll them (waitlist, medical necessity, etc.) you can create an inquiry for that client and assign it to someone from a different program. The other program will then be able to filter inquiries that were assigned to them. Things to keep in mind regarding this process.

- The inquiry will be created using the same steps outlined above.
- You are not assigning the inquiry to the program you are assigning it to a person, because of this you’ll need to know the name of the person dispositioning inquiries at the program you are assigning to.
- The person it is assigned to can then filter inquiries that have been assigned to them in order to view and disposition.