



SmartCare Guide

BH Connect EBP Program: Individual Placement & Support (IPS)/ Supported Employment Entering Monthly Bundled Services Workflow Version 2.0



BHC EBP Monthly Bundled Rate Service Entry in SmartCare

Open Client to Program

Follow SmartCare Workflows when receiving referral(s) and opening clients to your program and requesting prior authorization.

[SmartCare Workflow for MH-SUD 10.08.24.pdf](#)

Entering BHC EBP Services in SmartCare using the Bundled Rate Mode of Delivery

1. Open the service note screen. **Review and complete the service details**
 - a. **Confirm the Program, Procedure, Location, Clinician, and Mode of Delivery** are accurate.

▪ **Mode of Delivery must be selected for “BHC- Monthly Bundle”**

The screenshot shows the 'Progress Note' form in SmartCare. The 'Service' tab is active. The 'Mode of Delivery' dropdown menu is highlighted with a red circle and contains the text 'BHC - ACT/FACT Monthly Bundle'. Other fields include Status (Show), Program, Procedure (Crisis Intervention), Location, Clinician (Michalski, Jill), Start Date (05/07/2026), Start Time, Travel Time, Documentation Time, Service Time, Attending, Referring, Evidence Based Practices, Transportation Service (No), and Interpreter Services Needed (checkbox).

- Enter the actual procedure code for the service provided and Place of Service

b. **Confirm the Start Date is accurate and complete the time fields.**

- Travel Time – any time spent traveling to or from this service appointment. This will not be billed but is used for tracking.
- Documentation Time – any time spent documenting the service or related forms.



- Service Time – the length of the service time, even if the client was not present.
- c. Leave **Attending** and **Referring** blank.
 - d. **If you are in a Mental Health program, you may enter any Evidenced Based Practices you provided.** This is used for CSI reporting, so you can only select up to 3 and the options are limited to CSI reporting values.
 - e. **Enter whether Transportation Service was provided or not.** If the client does not have the Transportation Service checkbox checked in the Client Information, this will automatically populate as “No”. For services done via phone or telehealth, this may be marked “N/A.”
 - f. **Check Interpreter Services Needed if applicable.**

The screenshot shows the 'Progress Note' form in a web application. The form is titled 'Progress Note' and has a toolbar with various icons and a 'Save' button. Below the toolbar, there is a header section with fields for 'Effective' (10/29/2025), 'Status' (To Do), 'Author' (Vera, Monique), and '10/28/2025'. A red circle with the number '2' is next to the 'Effective' field. Below the header, there are tabs for 'Service', 'Note', 'Billing Diagnosis', 'Add-On Codes', 'Warnings', and 'Disposition'. The 'Service' tab is selected. The form contains several sections: 'Service' with fields for Status (Show), Program (MH Adult Outpatient), Procedure (Assessment LPHA), Location (Community Mental Health Center), Clinician (Vera, Monique), Mode Of Delivery, and Cancel Reason; 'Start Date' (10/29/2025), 'Start Time' (8:00 AM), 'Travel Time' (0 Minutes), 'Documentation Time' (15 Minutes), and 'Service Time' (45 Minutes); 'Attending' and 'Referring' fields; 'Evidence Based Practices' (a dropdown menu); 'Transportation Service' (No); and 'Interpreter Services Needed' (checkbox). Red callouts 'a' through 'g' are placed around the form to highlight specific fields: 'a' points to the Status dropdown, 'b' to the Program dropdown, 'c' to the Start Date field, 'd' to the Attending dropdown, 'e' to the Evidence Based Practices dropdown, 'f' to the Transportation Service dropdown, and 'g' to the Interpreter Services Needed checkbox. A red circle with the number '2' is also present in the top left corner of the form area.

- h. **In the Custom Fields section, enter Interpreter and Language information if applicable.**
 - Was Interpreter Utilized – If you mark Yes, indicate who the interpreter was. This could be an agency name or the name of a person. If an interpreter was not needed because you, the provider, did the service in the client’s native language, you can leave this blank.
 - **Indicate the language the service was provided in.**
- i. **In the Custom Fields section, there is a section for Comments.** This is usually used for no-shows and cancellations. Your Front Desk staff may also



put notes for you in this section, such as “the client called and will be 5 minutes late to the appointment.” Keep in mind that anything entered in this section will be considered part of the client’s record and can be viewed by the client at any time.

Custom Fields

Interpreter/Bilingual Service Information

Was an interpreter utilized? Yes No Language service was provided in

Interpreter Agency/Name

Other

Comments

3. If the status of the service is “**Show**”, you may now click on the Note tab. **Complete the progress note tab.** This note type may look different depending on the procedure code you have chosen. Most will include 3 fields: the Problem List section, the Note section, and the Care Plan section.
 - a. If you want to add problems to the problem list, you can do so here. Search for the problem using either the Code or Description field, enter the start date, and select your program. Then click Insert.

Progress Note

Effective: 10/29/2025 Status: To Do Author: Vera, Monique 10/28/2025 Sign

Service **Note** Billing Diagnosis Add-On Codes Warnings Disposition

General **3**

Problem Details

Code Search Description Search Start Date: 10/29/2025 End Date: Program: Insert Clear

Problem List

	Start Date	End Date	ICD 10 Code	ICD 10 Description	SNOMED CT Code	SNOMED Description	Program
X	05/01/2...		Z91.89	Other personal risk fac...	621081000124...	History of homelessness	MH Adult Outpatient

- b. **Select which problems you addressed** in today’s session. If you added a problem in step 3a above and don’t see the problem on this list, click the Refresh button.



Problems addressed during this session

Refresh

- Housing instability
- Positive screening for depression on Patient Health Questionnaire 2
- Anxiety disorder caused by methamphetamine

b

- c. **Enter your note** in the Information section. This should include all your usual clinical information, such as your interventions and the client's response to the interventions.
- d. **Enter your plan of care** in the Care Plan section. For services that require a treatment plan with specific items, this is where the treatment plan is entered. This information will pull forward from the most recent service note in the same program. There may be text templates available for specific treatment plan requirements.

Service	Note	Billing Diagnosis	Add-On Codes	Warnings	Disposition
General					
Information <input type="text" value="Choose Text Template"/>					
Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).					
Summary of needs/Rationale that supports the level of care determination:					
Client's current needs:					
Client's goals:					
Transition/discharge planning:					
Recommendations/Plan of Care:					
Care Plan					
Indicate the goals, treatment, service activities, and assistance to address the objectives of the plan and the medical, social, educational, and other services needed by the beneficiary. Include how the beneficiary or their representative helped to develop the goals, and the progress toward meeting the established goals. Indicate transition plan if the individual has achieved the goals of the care plan.					
Providing resources for finding housing					

c

d

- 4. The Billing Diagnosis tab will show you which diagnoses will be pulled onto the billing. You should generally ignore this tab for ongoing services. However, if you need to change the billing order, for example you want this note to focus on the secondary diagnosis, you can re-order the diagnoses to match your service without changing the overarching diagnosis form.

Progress Note

Effective 10/29/2025 Status To Do Author Vera, Monique 10/28/2025 Sign

Service Note **Billing Diagnosis** Add-On Codes Warnings Disposition

Billing Diagnosis

ICD 10...

Order	ICD/ DSM - Description
1	F15.180 - Caffeine-induced anxiety disorder, With mild use disorder

[Re-Order Diagnosis](#) [Refresh Diagnosis](#)

5. When you are finished with your documentation, **click Sign**.

Progress Note

Effective 10/29/2025 Status To Do Author Vera, Monique 10/28/2025 Sign

Service Note **Billing Diagnosis** Add-On Codes Warnings Disposition

Billing Diagnosis

ICD 10...

Order	ICD/ DSM - Description
1	F15.180 - Caffeine-induced anxiety disorder, With mild use disorder

[Re-Order Diagnosis](#) [Refresh Diagnosis](#)

Review of EBP Services for Bundled Rate Threshold and Claiming

EBP services are claimed and billed under either a Full Monthly Rate Bundle or a Partial Monthly Bundled Rate based on the **services provided during a single calendar month**.

At the end of each calendar month, Program(s) should:

- Run the **COSD Client Services Report (My Office)** for all services provided for the calendar month no later than 5th of the month following the month in which you are claiming services. *(See Pg 11 for Guidance on running COSD Client Services Report)*
 - Providers are reminded that DHCS requires all services to be documented within 3 days of date of service; all services for the month must have been entered before running the COSD Client Services Report (My Office).
- **Review all services** provided to the client(s) to ensure all services were entered with the MOD for the BH Connect Monthly Bundled Rate
 - if the MOD is incorrect, the service note will need to be corrected before the claim is batched and submitted to DHCS for reimbursement



- Incorrect MOD risks loss of revenue as the MOD is how claims are identified for the bundled rate and how DHCS will determine whether services provided meet the threshold for either full or partial bundled rate.
- Edit any services that should be claimed as unbundled services by changing the MOD from “BHC Monthly Bundle” to the appropriate MOD to unbundle the service **Complete these edits no later than the 10th of the month following the month to be claimed.** Billing Unit will begin processing and batching bundled claims on the 15th of the month.

Correcting the MOD for BHC Monthly Bundled Rate

Editing the Service Note to change MOD*

1. Select Client
2. Open **Services (Client)** List Page
3. Open Service Note to be edited

Services (5)

Search: Gurdy, Hurdy (200388767) + x

Filters: Show Services Only, All Statuses, All Clinician, All Programs, DOS From: 04/01/2026, DOS To, All Program Assignment, Include Services created from Claims

DOS	Procedure	Group Name	Units	Status	Clinician/Provider	Program	Location	Charge	Payment	Client Bal	3rd Party Bal	Add On Codes	Attachment(s)	Recurrence
04/22/2026 09:00 AM	TCM/TC 15 Minutes		1.00	Complete	Michalski, Jill MD Me...	CRF S BAY IMPAC...	Telehea...	\$373.99			\$373.99			
04/14/2026 02:00 PM	TCM/TC 20 Minutes		1.00	Complete	Michalski, Jill MD Me...	CRF S BAY IMPAC...	Telehea...	\$373.99			\$373.99			
04/09/2026 09:00 AM	Individual Therapy 30 Min...		1.00	Complete	Michalski, Jill MD Me...	CRF S BAY IMPAC...	Office	\$747.99			\$747.99			
04/08/2026 10:00 AM	Individual Therapy 30 Min...		1.00	Complete	Michalski, Jill MD Me...	CRF S BAY IMPAC...	Office	\$747.99			\$747.99			
04/02/2026 09:00 AM	Psychosocial Rehab - Indi...		3.00	Complete	Michalski, Jill MD Me...	CRF S BAY IMPAC...	Office	\$1,121.97			\$1,121.97			

4. Select **Override Service Detail** Icon

Service Detail

Regenerate Charge

Service Detail | Billing Diagnosis | Add-On Codes | Authorization(s)

Client: Wobbestone, Lu... Status: Show Start Date: 05/05/2026 Program: TELECARE VIDA ACT FACT

Procedure: Individual Therapy Modifier: Start Time: 10:00 AM Service Time: 45 Minutes

Clinician Name: Michalski, Jill End Date: 05/05/2026

Location: Office Attending: Referring:

Client was present (unused) Other Person(s) Present: Cancel Reason:

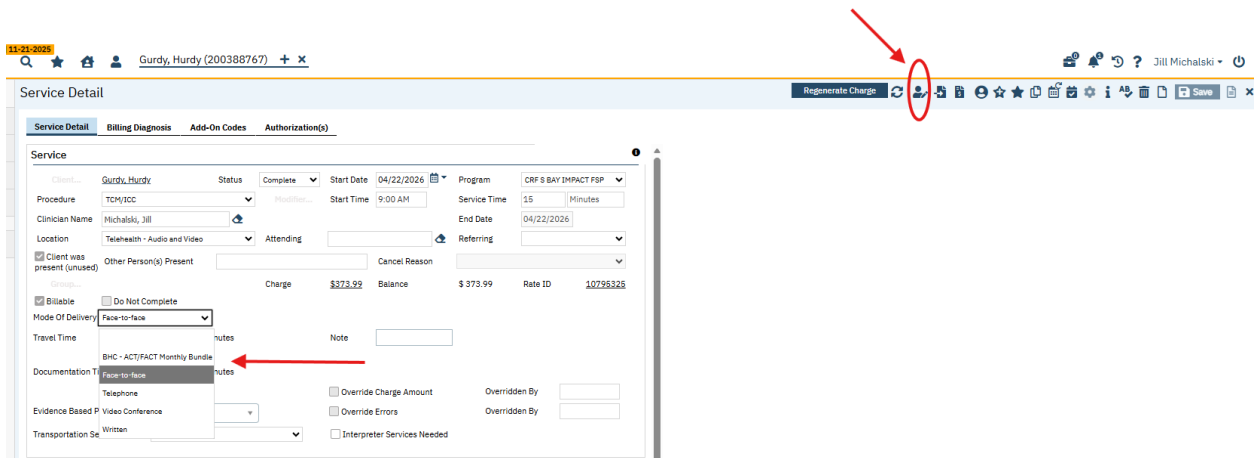
Group: Charge: \$1121.98 Balance: Rate ID: 11079355

Eligible: Do Not Complete

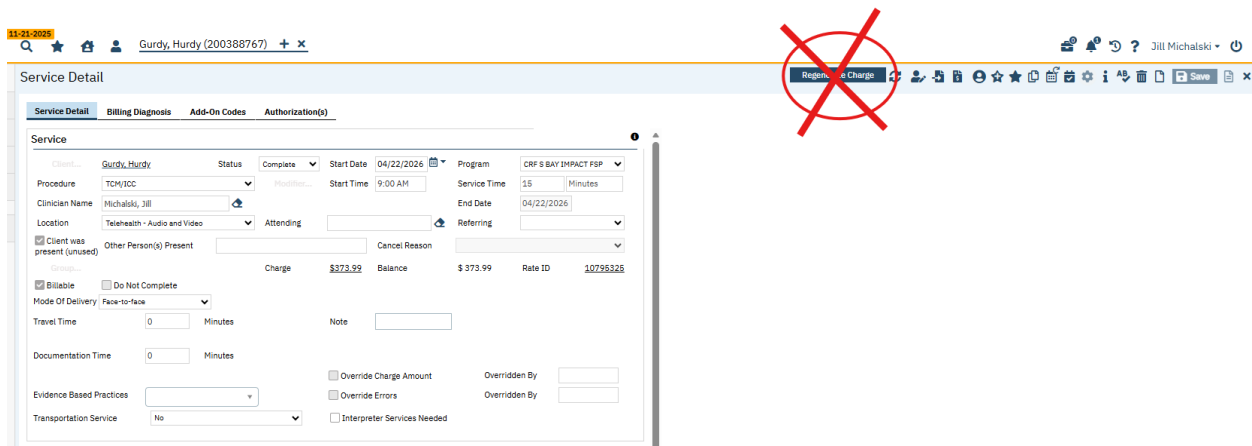
Mode Of Delivery: ENC - ACT/FACT Monthly Bundle

Travel Time: 0 Minutes Note:

6. Change the MOD* to BHC Monthly Bundled Rate if it was selected incorrectly.



7. Select **Save** – do NOT select the “Regenerate Charge” button.



7. Once your program has changed the MOD for any services that required MOD correction, notify MH Billing Unit that monthly services have been completed. This should occur no later than the 10th of the month following the month the services were provided.

8. No additional changes or edits should be made to service notes after the 10th of the month. If additional service corrections are needed, please reach out to the MH Billing Unit directly.

COSD Client Services Report (My Office)

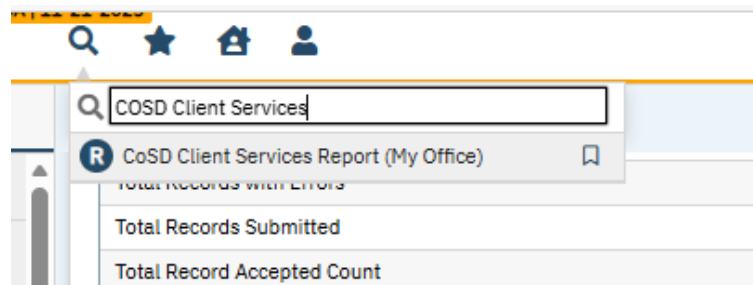
The COSD Client Services Report (My Office) provides a comprehensive view of client service activities, encompassing details on service delivery, client demographics, program participation, and staff involvement over the specified date range. This report will be used



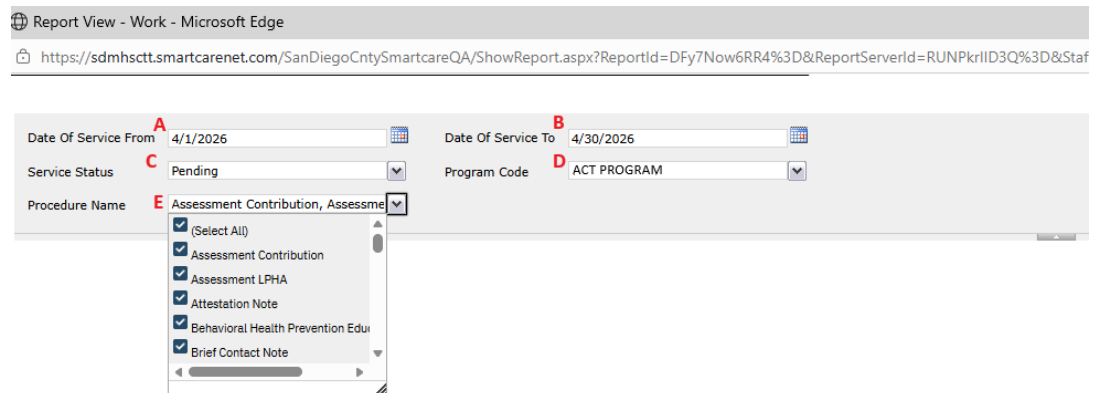
to review all services provided to the client for the specified month in order to determine if the threshold was met to claim the Full or Partial Monthly Bundled rate and to identify those services which may have incorrect MOD selected.

How to Run the COSD Client Services Report (My Office)

1. Click the Search Icon.
2. Type the Name of the report in the search bar.
3. Click to select the report.



4. A new window will open, **enter the parameters for the report:**
 - a. Enter Date of Service From (1st of month, i.e.: 4/1/2026)
 - b. Enter Date of Service To (last date of month, i.e.: 4/30/2026).
 - c. Enter Service Status as Pending
 - d. Enter Program Code (Name of Your Program)
 - e. Select All for Procedure Name(s)
 - i. you will want all services provided to the client by your program included to determine criteria for Full or Partial Month bundled rate and identify any services that may need to be corrected for MOD.

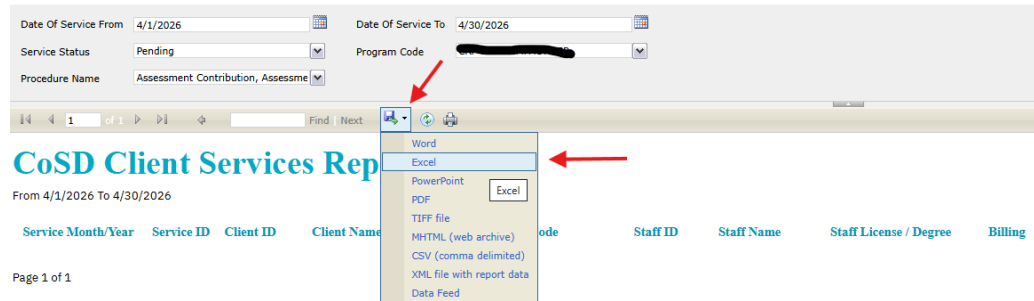




5. Click View Report.

6. The report will be displayed. To export the report, click the Save/Export button drop down arrow.

7. Select Excel or other export option.



8. Filter Report by Client Name

a. This will allow you to count the number of encounters/contacts provided to the client and whether the service(s) meet the threshold for bundled rates.

EBP Service (Abbrev.)	Code	Minimum No. of Total Units per Month for Partial Rate	Minimum No. of Face-to-Face Units per Month for Partial Rate	Minimum No. of Total Units per Month for Full Rate	Minimum No. of Face-to-Face Units per Month for Full Rate
Supported Employment	H20232	1		4	3