



SmartCare Application User Guide

V09.01.23

Contents

Requesting/Modifying/Removing Login Credentials	4
User Account FAQs	4
Logging-in, Navigation and Terminology	4
Logging-in	4
Navigation Terminology	5
Accessing and Navigating Client Records	6
Accessing Client Records	6
Client Information Screen	6
Client Banners	7
CM Events	8
CM Authorizations	8
Client Claims	9
Client Plans & Timespans	10
Accessing and Navigating Provider Records	11
Finding A Provider	11
Provider Files	12
Provider Contracts	13
Provider Documentation	14
Provider Information	14
Rates	16
CM Credentialing	16
Claims	17
Entering Claims	17
Professional/Provider Professional Claims	18
Institutional/Provider Institutional Claims	19
Third-Party EOBs	20
Estimate Line Billing	21
Checks	22
Notable Functions	24
Secure Messaging	24
Scanning/Uploading Records	24
Requesting Authorizations	25
	2

Questions or Concerns?

Please contact providersupport@swmbh.org for assistance.

Authorization Request with Level of Care (LOC) 27

ASAM Assessments 28

BH TEDS..... 29

Opioid Health Home (OHH) Care Plans..... 29

Claims FAQ 30

 Common Claim Denial Reasons 30

837 Billing..... 31

Requesting/Modifying/Removing Login Credentials

All User Account management activities can be managed by completing an [SWMBH's Online User Form](#) and following just a few easy steps.

1. Complete Questions 1 & 2 on the page, identifying yourself and what type of account activity you would like to complete.
2. Complete the General Disclaimer.
3. Enter user related information on the following two pages.
4. Complete question 10, if applicable.

User Account FAQs

- How long does it take to receive credentials after completing a request?
 - Requests are typically handled within 72 hours, but can be expedited per request to providersupport@swmbh.org
- Are agency accounts allowed?
 - No, everyone who logs into SWMBH SmartCare must do so via the account provided to them individually.
 - Account sharing may result in permanent deactivation from the application, among other things.

Logging-in, Navigation and Terminology

Logging-in

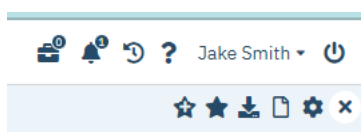
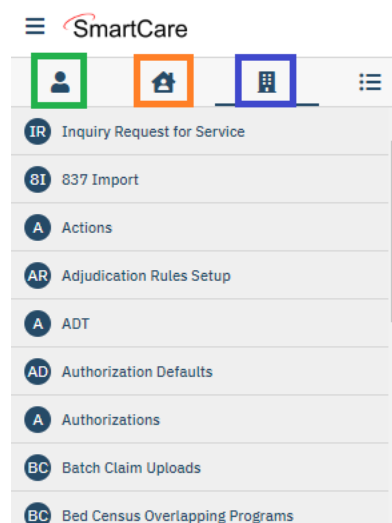
Users shall refer to their Welcome Email, which contains the url, username and temporary password for users logging-in for the first time. Please note that SWMBH employs industry standard security measures to protect client privacy and confidentiality.

- Users will be asked to confirm their identity via two factor authentication in the form of a verification code upon each login.
- Users will also occasionally be asked to answer security questions as an additional form of authentication.
- All account passwords expire every 90 days and must be reset at that time.
- All users will be deactivated after 35+ days of inactivity.

Navigation Terminology

Below you'll find a summary of the most common terminology used to navigate within the SWMBH SmartCare application.

- **URL**, a website's address
- **Banner**, this list of quick pages to access (highlighted, pictured right)
 - Other: Quick access to agency-level screens/pages
 - Provider: Quick access to provider screens/pages
 - Client: Quick access to client level screens/pages
- **Toolbar**, a list of actions on each screen (pictured below) typically located on the Top Right corner of the screen.

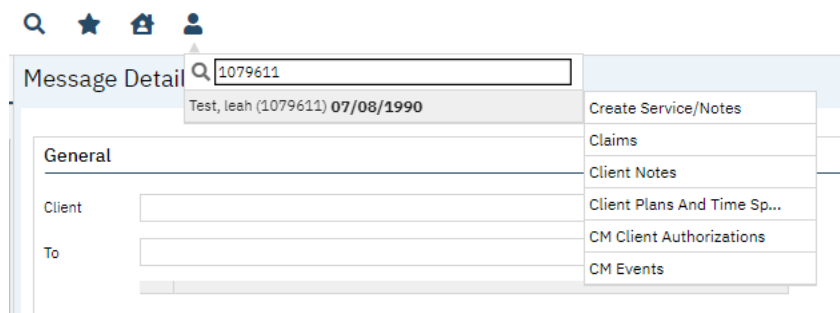


Each screen contains a unique list of 'tools' in their respective toolbar which execute specific functions or direct users to other screens. Users can hover over uncertain icons within the toolbar for guidance on their function (New, Save, Delete, Download, etc.)

- **List Page**, a screen showing a list of events, claims, etc.
- **Event**, a record entered into the client account.
- **Quick Search**, an easy place to search for reports/screens, Favorites, Providers and Clients (pictured below).



Users will be able to quickly navigate within and among Client, Provider, Favorite records by clicking on one of the icons seen below and searching (Client Search illustrated below).



- **SWMBH ClientIDs**, are unique client identifiers for SWMBH Clients. They can be found next to the client's name in the search field (e.g.-'1079611' above) and come in two varieties.

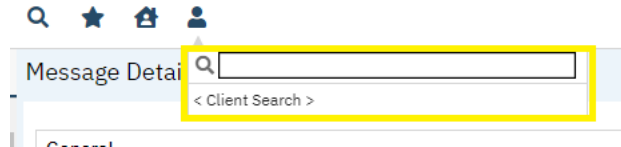
- SWMBH MasterID: the 'Master Record' of a client account which holds all client data.
 - Only records associated with the Provider the user is associated with may be visible from this record.
- SWMBH Provider ClientID: is a SUD specific record for the client, only accessible once a valid release is on file. This record contains only SUD records for the client in question.

Accessing and Navigating Client Records

Accessing Client Records

SWMBH Client Records can be accessed via the Client Search function found in the **Quick Search** field.

Users who have a Client Name or ClientID may use the quick search function to navigate directly to the client record as displayed below:



Users who do not have the relevant client information at hand may also expand their search by selecting the <Client Search> function within the Quick Search field and completing a more detailed search via the Client Search Popup, seen below:

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician	Program
----	-----------	-------------	-------------	---------	-----	--------	------	-------------------	---------

Client Information Screen

Once users have found their client, they may continue their navigation to the record and are defaulted to the Client Information screen (pictured below) upon arrival within the client record. A variety of basic client information can be found here, including SWMBH ClientID, MedicaidID, Addresses and Contact Information among other things.

The screenshot shows the SmartCare interface with the 'Client Information(C)' screen selected. The left sidebar contains 'LOC Setup', 'Client', and 'SmartLinks'. The main content area has tabs for 'General', 'Aliases', 'Demographics', 'Hospitalization', 'Primary care referral', 'Financial', 'Release of Information Log', and 'Contacts'. The 'General' tab is active, showing fields for 'Type of Client' (Individual selected), 'Client ID' (1043624), 'SSN' (9999), 'Primary Clinician' (Aardema, Andy), 'Primary Physician', 'Prefix', 'First Name' (account1), 'Middle Name', 'Last Name' (test), 'Suffix', 'E-Mail', 'Medicaid ID', 'Medicare Beneficiary ID', and 'Patient Portal ID'. There are 'Create' and 'Reset' buttons. Below this are sections for 'Phone Numbers' (Home, Mobile, Other, Business) and 'Addresses' (Home, Billing). A 'Comment' box is on the right.

Client Banners

Users may access additional components of the client record such as Events, Claims, Authorizations, etc. via the Client Banner found on the left side of Client Screens:

This screenshot shows the same 'Client Information(C)' screen as above, but with the 'Client' link in the left sidebar highlighted by a yellow box. A yellow arrow points from this box to an expanded 'Client Banner' menu. The menu lists various options: 'Client Inquiry Request for Service', 'ADT', 'Claims', 'Client Document Assignment', 'Client Information(C)', 'Client Orders', 'Client Plans And Time Spans', 'Client Progress Notes', 'Client Summary', 'Clinical Information Reconciliation', 'CM Client Authorizations', 'CM Events', 'DDStateReporting', 'Hospitalizations', and 'Institutional Codes'.

Note that certain screens such as CM Events are only available from within a client record. The most common screens are detailed in the following subsections.

CM Events

The CM Events list page includes all events associated with the specific client record that the user has permission to view.

🔍 ★ 🏠 👤 Test, Test (860008) + ✕

CM Events (3)

All Events ▾
All Insurers ▾

All Statuses ▾
All Providers ▾

All UM Staff ▾

Apply Filter

Event Id	Event	Date ▾	Status	Staff	Provider
1467917	Concurrent Review IP	10/13/2022 11:0...	Completed	Farwell, Karen	Lakeland Hospitals
1467910	IP Admit	10/10/2022 11:0...	Completed	Mitchell, Leah	Borgess Medical Center
979992	Other Scanned Record	01/17/2019 2:29 ...	Completed	Smith, Jake	1800 Wheelchair

Users may click the event hyperlink to access the record in question or can adjust filters for a more specific view of client events. The CM Events Toolbar also allows users to export the CM Events list page or even create new events.

CM Authorizations

A Client's Authorization history can be found by navigating to the CM Authorization banner of the Client Record. This listpage will display the full history of the client's authorizations.

🔍 ★ 🏠 👤 test, test (860006) 📄 + ✕

CM Client Authorizations (31)

All Insurers ▾
All Providers ▾

All Billing Codes/Group ▾
☒ Include Exchangeable Codes

All Statuses ▾
Effective As Of 📅

Apply Filter

Select: All, All on Page, None




	Auth Id	Provider Name ▾	Insurer	Site Name	Billing Code	Auth #	Status	Units	Used	From	To
<input type="checkbox"/>	785656	zTesting	SWMBH...		H0010	2021102...	Approved	1		10/22/2021	11/22/2021
<input type="checkbox"/>	785657	zTesting	SWMBH...		T1007	2021102...	Approved	1		10/22/2021	12/22/2021
<input type="checkbox"/>	787263	zTesting	SWMBH...		90853	UM-2021...	Approved	49	0	10/29/2021	09/30/2022
<input type="checkbox"/>	787264	zTesting	SWMBH...		H0038	UM-2021...	Approved	149	0	10/29/2021	09/30/2022
<input type="checkbox"/>	787265	zTesting	SWMBH...		H0020	UM-2021...	Denial-r...	10		12/01/2021	12/31/2021

Users can easily view Client Level Authorizations from this list page, as well as modify filters for a more precise view. Users may also export their list of authorizations via the export feature in the toolbar.



Additional guidance regarding the authorization process can be found on Pg. 25



Client Claims



A client's full claim history can be found within the Claims banner of the Client Record.



test, test (860006)  5  


Client Claims (2)

All Insurers  Entered From 

All  Entered To 

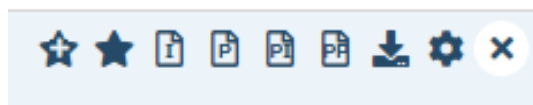
All Providers  DOS From 

All Sites  DOS To 

Apply Filter 

Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Paid Amount	Procedure	Insurer	Authorization(s)
3562222	test, test	Community He...	09/01/2...	Denied	\$0.00	\$0.00	H0001	SWMBH SUD	
3562223	test, test	Community He...	08/01/2...	Denied	\$0.00	\$0.00	H0001	SWMBH SUD	

Users can easily view Client Level Claims from this list page, including claim status. Users may also modify filters for a more precise view as well as export their list of claims via the export feature in the toolbar. Additionally, the claims toolbar includes the option of creating new Professional (P), Provider Professional (PP), Institutional (I) and Provider Institutional (PI) claims for the client via the icons below:



Additional guidance regarding the claims process can be found on Pg. 17

Client Plans & Timespans

Users can easily view and modify a client's plans & timespans from the Client Plans And Timespans screen. Below are some tips helpful to interpreting the screen:

- View a list comprehensive list of existing Plan and InsurerID information for a client.
- Modify the Start and End Dates of specific coverage plans.
- Easily view the current eligibility for a client.
- View a chronological order of client plans.

Client Plans And Time Spans (1)

Plan Name	Insured Id	Co-Pay	Start Date	End Date	COB	Service Area	
Medicaid MH	000111					MH	Add

☒ Show Current Plans Only Maximize Time Spans

Plan Time Spans

Verify Client Eligibility

Users may also run an instant eligibility check with the Michigan Department of Health & Human Services (MDHHS) via the Verify Eligibility tool in the Client Plans & Timespans toolbar:

Insurance Eligibility Verification

Request Response

Coverage Plan

Electronic Payer: Michigan Medicaid Payer Id: 000111

Insured Information

First Name: account1 Last Name: test SSN: 999999999
Insured Id: 000111 Date Of Birth: 10/31/1960 Sex: Male
Group Number:

Client Information

Relationship to the insured: Self First Name: account1 Last Name: test
Date Of Birth: 10/31/1960 Sex: Male

Date Range: Start and End date range cannot be greater than days
Start Date: 06/01/2023 End Date: 07/31/2023

Submit Request

Running the eligibility lookup tool (also known as a 270-71) will produce an output of the client's eligibility for the period queried:

Notes on Plans, Timespans and Eligibility

SWMBH automatically loads the most current Plans & Timespans available from MDHHS via a nightly 834 eligibility file load. For the purpose of claims payment, the default eligibility data provided via 834 Eligibility Record from MDHHS is considered the 'source of truth'. In the event a client's eligibility record does not match what is found via the Verify Eligibility tool, users are permitted to update the client Plans & Timespans.

Accessing and Navigating Provider Records

Provider Records provide a valuable repository for all provider related records, such as contracts, credentialing and miscellaneous documentation.

Finding A Provider

Provider agencies can easily be found via the Provider Search tool:

Users may also access Provider Records via Provider Search banner (if part of your application role) or via numerous hyperlinks found throughout the application.

Provider Files

Once users have identified and navigate to their provider, they will arrive at the Provider Summary Screen. Provider Summary screen provides an informal summary of information regarding the provider agency, including the agency's **SWMBH Assigned ProviderID**, which is found in parenthesis next to the provider's name in the search field (e.g.-2412 below). Information on this, and other Provider screens, is managed by SWMBH staff and is not editable by most users.

The screenshot shows a web browser window with a search bar containing 'zTesting (2412)' and a user profile icon. Below the browser window is a 'Provider Summary' section with a 'Summary' tab. The summary is organized into a grid of fields:

Provider Name: zTesting	Provider Status: Active	Network Provider: Yes	Provider Type: Facility
Contract Expiration Date: 06/01/2020	Insurer: Barry County CMH Authority, Berrien Mental Health Authority, Pines Mental Health Authority, Summit Pointe, SWMBH MH, SWMBH SUD, Venture SA (DO NOT USE)		
Primary Site: TEST SITE A	Site Type: Clinic	Site Status: Active	Address: 124 Main St., Battle Creek, MI, 94014
Paid YTD:	Payable:	Payable Past 30 Days:	Contact:
Pended:	Pended > than 60 days:	Credit/Receivable:	Phone:
Last Check:			
Other Active Sites: Test	Affiliated with: Yoder, Ariana, Yuan, MD, Michael, Zalner, Kali		Note: For testing BCCMHA and Pines Insurers on Auth Events

Like the organization of Client Records, Provider Records are organized and accessible via the Provider Banner and include the following modules:

Provider Contracts

The Provider Contracts summary screen provides a record of all provider agency contracts.

zTesting (2412) x

Provider Contracts (9)

From To All Insurers Type ☐ Show current contracts only

Contract ID	Insurer	Type	Contract Name	Start Date	Expiration Date
7023	SWMBH SUD	Signed Contract	zTesting (- SWMBH SUD - 202...	10/01/2022	10/31/2023
6464	SWMBH SUD	Signed Contract	zTesting - SWMBH SUD - 202110	10/01/2021	09/30/2022
5283	Van Buren County CMH	Signed Contract	zTesting - Van Buren - 201907	07/01/2019	07/30/2019
4411	Barry County CMH Authority		zTesting - Barry Coun - 201709...	09/18/2017	09/18/2017
4410	Barry County CMH Authority		zTesting - Barry Coppppp	09/18/2017	09/18/2017
4095	Van Buren County CMH		zTesting - Van Buren - 201610	10/18/2016	10/18/2016
4063	SWMBH MH	Signed Contract	zTesting - SWMBH MH - 201610	10/01/2016	09/30/2017
4000	SWMBH MH		zTesting - SWMBH MH - 201609	09/23/2015	09/23/2017
3886	Barry County CMH Authority		zTesting - Pines Ment - 201606	01/01/2000	06/01/2020

Selecting the relevant contract's ContractID will send users to the Contract Details Screen, where additional information regarding the specific contract in question, including Rates and Rules, can be reviewed:

zTesting (2412) x

Contract Details

Contract Details Contracted Rates Billing Code Rules

Contract Details

Status

Insurer Contract Start Date Expiration Date

Contract Name Type Payment Terms

Claims must be received within days from the date of service. Older claims will be ☐ Pended ☒ Denied

The total dollar value of this contract may not exceed

Current claims approved and paid

% of Cap used

☐ Provider/Site must be credentialed else the claim will be pended
☐ Rendering provider must be credentialed else the claim will be pended

Cannot add or modify rules until contract has been Updated
Cannot add or modify rates until contract has been Updated

zTesting (2412) x

Contract Details

Contract Details | **Contracted Rates** | Billing Code Rules

Insurer: SWMBH SUD Contract Name: zTesting (- SWMBH SUD - 2023) Effective As Of:
 Site: All Sites Client: Start Date: 10/01/2022 Expiration: 10/31/2023
 Coverage Plan: All CoveragePlans Billing Code: All Billing Codes

Apply Filter

<input type="checkbox"/>	Rate ID	Code + Modifier(s)	Name	Rate/Unit	Contract Rate	Sites	Client(s)	Coverage Plan	Modified Start Date	Modified End Date	Associated Providers	Licensure Group	POS
<input type="checkbox"/>	1103...	S0280	Monthly...	1.00 Un...	\$262.43			AMBETT...			No		
<input type="checkbox"/>	1103...	S0280:HG:	Monthly...	1.00 Un...	\$0.00			AMBETT...			No		
<input type="checkbox"/>	1103...	S0280:H...	Monthly...	1.00 Un...	\$0.00			AMBETT...			No		

Please note that the modification of contracts is limited to SWMBH Provider Network staff and is view only for external users.

Provider Documentation

The Provider Documentation banner provides a secure receptacle for the storage of miscellaneous provider related uploads such as signed contracts and communications:

zTesting (2412) x

Provider Documents (1)

Provider: 2412 zTesting (2412) All Record Types
 Show Scanned/Uploaded: All Scanning Staff All Statuses: Other
 Effective Dates Between: Created Between: 06/21/2017 And 07/31/2020

Apply Filter

Associated With	ID	Name	Record Type	Created	Effective	Scanned By	Status	Provider	Insurer
Provider	2412		Scanned Contract (Te...	07/30/2019	07/30/2019	Smith, Jake	Completed	zTesting	

Please note that access to the Provider Documents banner is limited to SWMBH Provider Network staff at the time of publication.

Provider Information

The Provider Information banner provides users with easy access to contact information, associated Rendering Providers and important identifiers among other things:

zTesting (2412) x

Provider Information

General Sites Contact Persons

Type ☒ Facility ☐ Individual ☒ Active ☐ Non-Network Provider

Provider Name: zTesting

Primary Site: TEST SITE A

Associated Providers...

Provider Name
X Yoder (1752)
X Yuan, MD (2174)
X Zalner (2341)

Associated Insurers...

Insurer Name
X Barry County CMH Aut...
X Berrien Mental Health ...
X Pines Mental Health A...
X Summit Pointe
X SWMBH MH

☒ Data Entry Complete
☐ Authorizations cannot be created if data entry is not complete
☒ Uses Provider Access
☒ Substance Use Provider
☐ Rendering Provider
☐ Credential Approaching Expiration

External ID: Website:

Provider Comment:
For testing BCCMHA and Pines Insurers on Auth Events

The SWMBH SmartCare application also allows Providers to segregate business lines/locations based on 'Sites', which are organized on the 'Sites' tab of the Provider Information Screen:

zTesting (2412) x

Provider Information

General **Sites** Contact Persons

Site Information

Name: TEST SITE A

Start Date: End Date:

☒ Active ☒ Primary Site Site ID: 4038

Phone Numbers

Home: Business: Fax: Mobile:

Address

Office: 124 Main St.
Battle Creek, MI 94014

☐ Billing Details...

Program: Type: Clinic

Print on Check as: NA

Capacity: Current Openings: As Of:

☐ Weekend Hours ☐ Handicap Access ☐ DD Population ☐ Adults ☐ 1099
☐ Evening Hours ☐ SUD Population ☐ MI Population ☐ Children

Tax ID: EIN ☒ SSN ☐ 11111111

NPI: 111111112

Provider ID: Taxonomy Code: Place of Service: License #:

☐ Use for all sites ☐ Use for all sites ☐ Use for all sites ☐ Use for all sites

National Provider Identifier (NPI), Employee Identification Numbers (EINs), Addresses and other important information identifiers are stored at the site level. These are critical identifiers which play an important role in the claim payment process and must be maintained with the most current information available.

Rates

A comprehensive list of all contract rates included in provider contracts can be found on the Rates list page:

zTesting (2412) x

Provider Rates (78)

All Insurers All Sites All Clients

All Contracts Effective As Of

Rate Id	Code	Name	Rate Unit	Contract Rate	Start	End	Site	Client	Insurer
110347	S0280	Monthly Case Rat...	1 Units	<u>\$262.43</u>	10/01/2022	10/31/2023	No	No	SWMBH SUD
110348	S0280 ...	Monthly Case Rat...	1 Units	<u>\$0.00</u>	10/01/2022	10/31/2023	No	No	SWMBH SUD
110349	S0280 ...	Monthly Case Rat...	1 Units	<u>\$0.00</u>	10/01/2022	10/31/2023	No	No	SWMBH SUD
94875	H0001	Alcohol and/or Dr...	1 Items	<u>\$1.00</u>	10/01/2021	09/30/2022	No	No	SWMBH SUD
94876	H0001 ...	Alcohol and/or Dr...	1 Items	<u>\$1.00</u>	10/01/2021	09/30/2022	No	No	SWMBH SUD
94877	T1007	Treatment Planning	1 Units	<u>\$1.00</u>	10/01/2021	09/30/2022	No	No	SWMBH SUD
94878	90834	Indiv Therapy 38-...	1 Items	<u>\$1.00</u>	10/01/2021	09/30/2022	No	No	SWMBH SUD

CM Credentialing

The CM Credentialing banner offers easy access to an agency's entire credentialing record, including licensure, liability and accreditation among others:

zTesting (2412) x

Credentialing (1)

From To All Sites All CredentialingType

Credentialing ID	Site	Credentialing Type	Effective From	Expiration Date
<u>3166</u>		Organizational	08/01/2023	08/01/2025

Please note that the modification of credentialing records is limited to SWMBH Provider Network staff and is view only for external users.

Claims

A list page of all claims associated with the Provider and Insurer associated with the user's account permissions are available via the My Office: Claims banner. As with all list pages, filters can be modified for a more nuanced search of claim lines, and users may also export the list page via the export function in the toolbar.



Claim Lines (0)

All Insurers	All Statuses	All Providers	All Sites	Apply Filter
All Bank Accounts	All Populations	All Billing Codes and Modifiers	All Billing Codes	Detail Report
Pended/Credit Bal Filter	Batch #	Claim ID	Line #	All Denial Reasons
Received From: 08/04/2023	Received To: 08/04/2023	DOS From	DOS To	
<input type="checkbox"/> Re-allocation Exception				

Select: All, All on Page, None Total Payable Amount : \$ 0

Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Paid Amount	Procedure	Insurer	Units	Reason
No data to display										

Users can create new claims by selecting the **Institutional (I)**, **Provider Institutional (PI)**, **Professional (P)** or **Provider Professional (PP)** icons in the toolbar.

Entering Claims

After selecting the appropriate claim format from the toolbar, users can enter relevant claim information from the form provided.

Professional/Provider Professional Claims



Claim Entry - Professional (PP)

General

Custom Fields

Client and Provider

Cannot proceed without a client and a provider

Auth #

Last Name... First Name

Provider... Site

Insurer

Claim Information

Claim Received 08/04/2023

Clean Claim Date 08/04/2023

Claim Status ☒ Entry Complete

Claim Id -1

Claim Header

Patient Account No. 0 Invoice Number

Diagnosis 1. 2. 3.

Service Lines

From To Code Modifiers

POS Rendering Provider

Ordering Provider Supervising Provider Units Charge

NDC NDC Unit NDC Unit Type

Dx 1 Third Party EOB Information Allowed Paid Adj

Estimate Line billing... Insert Clear

	Id	From	To	CPT Code	Units	POS	Dx	Charge	Auth
--	----	------	----	----------	-------	-----	----	--------	------

Professional/Provider Professional Fields of Note:

- **Client:** Client Search will pop up upon open. If a client is already open, will initialize into claim.
- **Auth #:** users do not need to include this information. The SWMBH SmartCare application will find the applicable auth automatically.
- **Invoice Number:** users do not need to include this information.
- **Diagnosis (1-3):** Will initialize from prior diagnosis. If none, one (min) must be manually entered.
- **Ordering Provider:** users do not need to include this information.
- **Supervising Provider:** users do not need to include this information.
- **NDC:** users do not need to include this information.
- **NDC Units:** users do not need to include this information.
- **Code:** Billing Code will automatically populate with a list of codes included in the provider's contract for the DOS.
- **Modifiers:** Modifiers must match a contract rate included in the provider's contract.

- **Charge:** selecting the calculator next to this field will default the charge to the rate included in the provider's contract.

Institutional/Provider Institutional Claims



Claim Entry - Institutional (PI)

General

Custom Fields

Client and Provider

Cannot proceed without a client and a provider

Auth #

Last Name... First Name

Provider... Site

Insurer

Claim Information

Claim Received 08/08/2023

Clean Claim Date 08/08/2023

Claim Status ☒ Entry Complete

Claim Id: -1

Claim Header

Patient Account No. 0 Invoice Number

Start Date

Admission Date

Discharge Time

Diagnosis

Admission Principal 1. 2. 3.

Service Lines

From To Revenue Code HCPCS Code Modifiers

Units Total Charges

Third Party EOB Information Allowed Paid Adj

Estimate Line billing... Insert Clear

	Id	From Date	To Date	HCPCS Code	Revenue Code	Charges	Units	Auth
--	----	-----------	---------	------------	--------------	---------	-------	------

Professional/Provider Professional Fields of Note:

- **Client:** Client Search will pop up upon open. If a client is already open, will initialize into claim.
- **Patient Account No.:** Will automatically populate based on client selected.
- **Start Date:** Enter start date of institutional claim here.
- **Admission Date:** Enter admission time here.
- **Discharge Time:** Enter discharge time here.
- **Auth #:** users do not need to include this information. The SWMBH SmartCare application will find the applicable auth automatically.
- **Invoice Number:** users do not need to include this information.
- **Diagnosis (1-3):** Will initialize from prior diagnosis. If none, one (min) must be manually entered.
- **Ordering Provider:** users do not need to include this information.
- **Supervising Provider:** users do not need to include this information.
- **NDC:** users do not need to include this information.

- **NDC Units:** users do not need to include this information.
- **Revenue Code:** enter Billing Code here, this field will not auto-populate.
- **HCPCS Code:** For use only under applicable circumstances.
- **Primary Diagnosis:** Enter the client's Primary Diagnosis here.
- **Principal Diagnosis:** Enter the client's Principal Diagnosis here, may match Primary.
- **Diagnosis (1-3):** Will initialize from prior diagnosis. If none, one (min) must be manually entered.
- **Total Charges:** selecting the calculator next to this field will default the charge to the rate included in the provider's contract.

Third-Party EOBs

In the event that a Third-Party EOB is required as part of a claim, users can access the EOB fields via the **Third Party EOB Information** hyperlink on the Claim Form.

Claim Entry Payment and Adjustment							
Claim Entry Payment and Adjustment							
						Save	Close
	Payer	Payer Name	Allowed Amount	Previous Payment	Previous Adjustment	Group Code	Reason
X	▼					▼	▼
X	▼					▼	▼

Charge Amount Total Allowed Total Paid Total Adjusted Claimed Amount

- **Payer:** The primary EOB payer (Commercial Insurance, Self, etc.).
- **Payer Name:** The primary EOB payer name (Blue Cross, Client Name, etc.).
- **Allowed Amount:** EOB Allowed Amount.
- **Previous Payment:** Primary payer previous payment.
- **Previous Adjustment:** Previous Adjustment, if applicable.
- **Group Code:** See dropdown.
- **Reason:** See dropdown.

EOB Calculus: in the event a user is billing for a service, with a previous payment from the primary payer, the SWMBH SmartCare adjudication logic will approve the difference between the previously paid amount and the Contract Rate for the code between the secondary insurer and the provider. For Example;

SWMBH-Provider contract rate = \$85/unit.

Billed Amount = \$100

Previous Payment= \$75

Approved for Payment= \$10

Estimate Line Billing

Billing the same code which requires a unique claim line over a continuous period? Estimate Line Billing allows you to enter in several claim lines at once. Just enter timeframe, code and total charge information in the Service Line window and select the Estimate Line Billing button on the claim form to review the claim line breakdown.

The screenshot shows a software window titled "Estimate Line Billing". At the top right are buttons for "Update", "Update/Close", and "Cancel". The main area contains a table with columns "Date Of Service", "Units", and "Charges". The table lists dates from 08/01/2021 to 08/08/2021, each with 1 unit and a charge of 100. To the right of the table, there is a section for "Code/Modifier" (90791), "From" and "To" dates (08/01/2021 to 08/08/2021), "Total Charge" (800), "Total Units" (8), "Allocated Charges" (800), and "Allocated Units" (8). At the bottom right of this section are "Reset" and "Reallocate" buttons.

	Date Of Service	Units	Charges
X	08/01/2021	1	100
X	08/02/2021	1	100
X	08/03/2021	1	100
X	08/04/2021	1	100
X	08/05/2021	1	100
X	08/06/2021	1	100
X	08/07/2021	1	100
X	08/08/2021	1	100

Code/Modifier: 90791
From: 08/01/2021 To: 08/08/2021
Total Charge: 800 Total Units: 8
Allocated Charges: 800 Allocated Units: 8
Reset Reallocate

Pressing Update/Close after entering in claim line information and selecting Reallocate will create a unique Claim Line for each date of service on your Claim Form.

Checks

SWMBH Care Management users can view Checks and Remittance Advice copies via the Checks portion of the My Office Banner.

🔍 ★ 🏠 👤

Checks (1281)

All Insurers

All Bank Accounts All Check Statuses Check Date From 05/07/2016 Check Date To 05/25/2023

Select: All, All on Page, None Check Total: \$ 0

	Date	Check Number ▾	Payee	Payment Amt	Insurer	Bank Account	Check Status
<input type="checkbox"/>	03/21/2023	7169		\$38.00	SWMBH SUD	SWMBH - Come...	Non-Voice ▲
<input type="checkbox"/>	03/21/2023	7168		\$10.24	SWMBH SUD	SWMBH - Come...	Non-Voice
<input type="checkbox"/>	03/21/2023	7167		\$19.00	SWMBH SUD	SWMBH - Come...	Non-Voice
<input type="checkbox"/>	01/05/2023	7156		\$36,453.14	SWMBH SUD	SWMBH - Come...	Non-Voice
<input type="checkbox"/>	01/05/2023	7155		\$176,810.35	SWMBH SUD	SWMBH - Come...	Non-Voice
<input type="checkbox"/>	12/22/2022	7144		\$10,946.57	SWMBH SUD	SWMBH - Come...	Non-Voice

Users can View **Check Details** by clicking on the Check Number hyperlink on their checks list page. From this point users will be able to view each claim line associated with the check.

🔍 ★ 🏠 👤

Check Details





Check Information
 Next Available # 7170 ☐ Include Pended Claims on RA
☐ Include Denied Claims on RA

Check Actions
Check Date 03/21/2023 Check Number 7169 Amount 38.00 Insurer SWMBH SUD
Payable To Tax Id ☐ This is a Refund Return Check
Printed By glm Printed On 03/21/2023 ☐ This is Check is Void

Below is a List of Claim Lines paid by this Check

Claim Line	DOS	Billing Code	Units	Amount	Client Name	Client Id
5984607	10/13/2022 1...	H0020	1	\$19.00		
5986875	10/18/2022 1...	H0020	1	\$19.00		

The Check Details screen provides important information regarding payments, including what Claim Lines and DOS are included, as well as options to Print RAs and Generate 835 Files.

Check Details

Check Information

Void Checks

Print Check

Next Available # 7170

Export

835 File


Print RA

☐ Include Pended Claims on RA
☐ Include Denied Claims on RA

Check Actions

Check Date

03/21/2023



Check Number

7169

Amount

\$38.00

Insurer

SWMBH SUD

Payable To

Tax Id

☐ This is a Refund Return Check

Printed By

glm

Printed On

03/21/2023

☐ This is Check is Void

Below is a List of Claim Lines paid by this Check

Claim Line	DOS	Billing Code	Units	Amount	Client Name	Client Id
5984607	10/13/2022 1...	H0020	1	\$19.00		
5986875	10/18/2022 1...	H0020	1	\$19.00		

Please note that the Void and Print functions of checks are limited to SWMBH Claims staff and is view only for external users.

Notable Functions

Secure Messaging

SWMBH Care Management users may send secured messages between application users via the Messages portion of the My Office banner.

The screenshot shows the 'Messages (1)' section of the My Office banner. At the top, there are navigation icons: a magnifying glass, a star, a house, and a person. Below these, the 'Messages (1)' title is displayed. The main area contains a filter bar with radio buttons for 'Received' (selected) and 'Sent'. There are input fields for 'From' and 'To', and a date range filter set to 'This Week' with a dropdown arrow. Below the filter bar, there is a 'Delete Selected' button. A table lists the messages with columns: Status, From, Date Sent/Received, Client, Subject, Priority, and Reference. The first message is from 'Smith, Jake' on '04/03/2023 10:31 AM' with the subject 'test, test (860...' and priority 'Normal'. The status column shows a checkbox, a close icon, and a radio button. Below the table, there are 'Reply' and 'Forward' buttons. At the bottom, there is a 'Details' section with input fields for 'To', 'From', 'Date', 'Reference', 'Client', and 'Subject'.

Status	From	Date Sent/Received	Client	Subject	Priority	Reference
<input type="checkbox"/> <input type="close"/> <input type="radio"/>	Smith, Jake	04/03/2023 10:31 AM	test, test (860...	Test	Normal	Messages

Messages received by the users can be found in the user's inbox and will display in the Details tab of the screen once the radio button in the second column of the message's row is selected. Users are also able to view messages they've sent via the **Sent Messages** radio button.

Scanning/Uploading Records

SWMBH SmartCare users can view and upload relevant client records directly into the client file (CM Events) via the My Office: Scanning banner. Users can view a list of all previously scanned records which they have uploaded via the Scanning list page;

Scanned Medical Records (1)

All Associations
...

Show Scanned/Uploaded
Smith, Jake

Effective Dates Between
And

All Record Types
Apply Filter

All Statuses
Other

Created Between
11/10/2022
And
11/10/2022

Associated With	ID	Name	Record Type	Created	Effective	Scanned By	Status	BatchId	Provider	Insurer
Client (Events)	1028244	Test, Test		11/10/2022	11/10/2022	Smith, Jake	Completed		zTesting	SWMBH S

To upload a new record to a client or provider account, simply select the Upload New Images icon from the toolbar.

Upload File Detail

Client (Events)
860006
test, test
Effective
08/01/2023

Record Type
Correspondence
Description
TEST

Provider
Search Provider..
Insurer

Image Details

Delete File
Reload File
Reload All
Insert File
Append File
Of 0

Users will select the relevant record category (Client Events or Provider), client (select ...), Effective Date, Provider, Insurer and can even add a free text Description to the record. Upon uploading the record will appear on the Scanned Medical Records list page as well as relevant client (CM Events) or provider (Provider Documents) list pages.

Requesting Authorizations

Users attempting to request authorizations may do so by creating a new Authorization Request Event from a client's CM Events banner.

Test, Test (1028243) + x

Authorization Request

Effective 08/09/2023

 Status New
 Author Smith, Jake

Event **Note**

Authorization Request

Insurer
 Insurer Provider Insurer and Provider Applies to all authorizations listed below

Authorizations
 Start Date End Date Site
 Code Req Units How Often ?
 Modifiers Total Units [Add Code](#) ☐ Urgent

Requestor's Rationale

Women's Speciality
 Women's Speciality Program ☐ Yes ☐ No (If yes to any of the following questions – Mark Yes for Women's Speciality Program: Is client a pregnant woman? Does the client have dependent children? Is the client trying to regain custody of his/her child(ren)?)

After completing the Insurer, Provider, Start-End date fields the code dropdown will automatically populate with a list of available codes. No codes appearing after this point is typically a symptom of no contract being place for the DOS in question. Please contact your contract representative from SWMBH Provider Network in such an event.

After entering in the relevant information above, including code, users may move forward with the remaining elements of the request. Selecting the Add Code feature will allow users to request multiple services from the same request.

Upon completion of an Authorization Request event the request will be assigned an Authorization # and be places as Requested status and can be viewed on both the My Office: CM Authorizations and Client: CM Authorizations list pages.

Authorization Request with Level of Care (LOC)

SWMBH offers a unique streamlined authorization process for qualified providers. The Authorization Request with LOC event provides users with an instant determination on their request, provided the client has an ASAM Assessment available within the past 30 days of the request and a valid Release of Information available in the past 365 days in addition to standard authorization request requirements such as TEDS and relevant clinical rationale.

Users will be familiar with many of the fields on the Authorization Request with LOC event considering they are also included on the Authorization Request Event, however there are a few fields of note:

- Applicable LOC information from the past 30 days is automatically displayed here.
- Selecting Recalculate LOC will refresh the applicable LOC in the event a more recent Assessment is created.
- Upon entering in all authorization request information, inserting and saving, the determination will appear here. If all criteria are met, the determination will automatically approve.

Authorization Document with LOC

Effective: 08/10/2023 Status: In Progress

Event Note

Authorization Document with LOC

Requestor: Jake, Smith
Program: SA - Outpatient
Client: Test, Test
Document: Authorization Document with LOC
Insurer: SWMBH SUD

Requestor Comment

Treatment Plan Dates
Tx Plan Start Date: 08/01/2023
Tx Plan End Date: 08/31/2024

Level of Care

Client level of care as determined by the assessment tool.

Level of Care

How is level of care determined?
Level of Care Description

Recalculate Level of Care
Manually Override Level of Care

Authorization Requests

Provider/Site: All Sites

Requested

From: To: Procedure: Units: Frequency: Total Units: Urgent: ☐

Approved

Auth Code: Units: From: To: Frequency: Total Units: Auth #

Requested: 0 + Previously Requested: 0 = Total: 0 LCM Cap: CCM Cap:

Authorizations

Provider	Auth Code	Requested Units	From	To
No data to display				

Please note that the Authorization Request with LOC event is only available to pre-approved providers. Please contact your contract representative from SWMBH Provider Network for more information.

ASAM Assessments

The SWMBH SmartCare application interfaces directly with FEI Systems to allow users logged-into SmartCare to easily complete ASAM Continuum Assessment without logging-in directly to FEI.

The ASAM Continuum Assessment Event can be accessed via the CM Events banner within a client record.

Effective 08/10/2023 Status In Progress Author Smith, Jake

Event Note

Assessment Details

Assessment Date:
Assessment Begun Date:
Assessment End Date:
Assessment Class:

Assessment Begun Time:
Assessment End Time:
Assessment Type:

Assessment Scores

CIWA-Ar:
CINA:
Addiction Severity Index Composite Scores
Medical:
Employment:
Family/Social:
Psychiatric:
Alcohol:
Drug:
Legal:

ASAM Continuum Level and Qualifiers

Co-Triage ASAM Continuum Level and Qualifiers:

Assessment Import

- Selecting Assessment will initiate a popup which directs users to the FEI Portal where the ASAM Assessment can be carried out.
- After completion of the ASAM Assessment, users return to SWMBH SmartCare and select Import to import the assessment scores.
- Assessment Scores and additional details will be initialized from the FEI system here.

BH TEDS

The SWMBH SmartCare application allows users to complete BH TEDS Admissions, Updates and Discharge events directly within the environment. [TEDS Records change annually as prescribed by the Michigan Department of Health & Human Services \(MDHHS\)](#) and are required for nearly all SUD Authorization Requests.

BH TEDS records require specific administrative and clinical training to complete. Please contact your SWMBH SUD representative or SUD Director for additional guidance regarding BH TEDS records.

Opioid Health Home (OHH) Care Plans

The SWMBH SmartCare application includes OHH Care Plan Events, known simply as Care Plans, for the purpose of managing Opioid Health Home episodes. The event offers original Care Plans, Addendums and Reviews for the purpose of maintaining an ongoing record of OHH care.

The screenshot displays the 'Care Plan' form in the SWMBH SmartCare application. At the top, there is a header bar with a search icon, a star icon, a home icon, a user icon, and the text 'test, account1 (349196)'. Below this, the 'Care Plan' title is shown. The form includes a date field for 'Effective' set to '08/10/2023', a 'Status' dropdown set to 'New', and an 'Author' dropdown set to 'Smith, Jake'. There are tabs for 'Event' and 'Note'. Below these are tabs for 'General', 'Needs', 'Goals/Objectives', 'Intervention', 'Diagnosis', and 'Supports/Treatment Program'. The 'General' tab is selected, showing three radio buttons: 'Care Plan' (selected), 'Addendum', and 'Review'. A text field for 'Client name to be utilized in goal descriptions on plan' is set to 'account1'. Below this are sections for 'Strengths' and 'Barriers', each with a large text area for input.

Users may import ASAM Level of Care data, enumerate client needs as well as track goals/objectives and interventions. Please contact your SWMBH OHH Coordinator for additional guidance on OHH Care Plans.

Claims FAQ

Claims submitted to SWMBH will automatically adjudicate each night and can be immediately adjudicated at the discretion of the SWMBH Claims Team. Upon entering a claim into the SWMBH SmartCare application the status will be 'Entry Complete'. The most common claim statuses upon adjudication are below:

- **Approved/Partially Approved:** Claim has been approved.
 - After the approval process the claim will be set to 'To Be Paid' and await payment in the form of a check.
 - Currently SWMBH does not provide a means to receive EFT Payments.
- **Denied:** provides a list of all denied claims which may require further review.
 - Providers are encouraged to review Denied claims on a continuous basis.
 - Denied claims can be reverted at the will of the provider and 're-worked' for resubmission.
 - Users are strongly advised to avoid creating duplicate claims in the SWMBH SmartCare Application. Denied Claims should be modified in their existing form to achieve approval.
 - Failure to adhere to guidelines surrounding the creation of duplicate claims may lead to users being relieved of their access to the SWMBH SmartCare Application.

Common Claim Denial Reasons

For claims which are Denied or Partially Approved, users can review the Denial Reasons column of the Claim Lines list page for an explanation of the determination. Common Denial Reasons include:

- **Billing Code is an Add-on and Primary Service Billing Code is missing.**
 - Several codes, such as OHH and ABA benefit, require a Primary Service billing code to achieve approved status prior to any Add-ons being approved. Please contact your SWMBH Care Coordinator for additional details.
- **Billing Code requires Authorization and one does not exist.**
 - Users will encounter this denial reason in the event the claim they are attempting to bill does not have prior authorization, or the previous authorization has been exhausted. Users can review a client's Authorization via the CM Client Authorization banner of the Client record (pg.15)
 - Note that any modifier, site or other restrictions may be applied to the authorization and must be matched verbatim (in most cases) on the claim.
- **Billing Code Unit Frequency exceeds Contract Rules.**
 - In addition to universal rules surrounding the frequency in which a code can be billed, some provider contracts also enforce unique contract rules.

- These rules can be viewed via the Billing Code Rules portion of the Provider banner (pg.21).
- Claim was received after period mentioned in Contract.
 - Users will encounter this denial reason when the claim is submitted after the period mentioned in the contract.
 - Users can view the contract details regarding claim timeliness on the Contracts portion of the Provider banner (pg.19)
- Member is not eligible for any Plan.
 - Users will encounter this denial reason in the event that there is no appropriate coverage plan for the client on the claim's date of service.
 - Additional details regarding client eligibility can be found on the Plans & Timespans portion of the Client banner (pg.13)
- No Rate can be found for this Claim Line.
 - Users will encounter this denial reason when the adjudication process is unable to locate an applicable contract rate for the billing variables present on the claim form.
 - The adjudication process will review the relevant contract in the pursuit of matching the DOS, Site, Billing Code, Billing Code Modifiers and Associated (Rendering) Provider found on the claim form.
 - Additional details regarding contract variables can be found on the Contracts portion of the Provider banner (pg.20)
 -
- Waiting for 3rd Party EOB.
 - If a claim requires an EOB, users will be required to revert the claim(s) in question to Entry Complete and utilize the Third-Party EOB Information to complete this information.
 - Users will also need to uncheck the Previous Payer.

837 Billing

Qualified providers can upload 837 text files directly into the application through the 837 banner or may engage with a Clearinghouse to do so. An 837 Companion Guide is available for those interested in utilizing this method of billing. Please contact providersupport@swmbh.org if you would like to know more.

