



SmartCareMCO Board User Manual (version 3.0)

Last updated September 23, 2025

PURPOSE

This document contains instructions related to behavioral health Board staff members accessing and using a production SmartCareMCO environment administered by PartnerSolutions.

Please note that not all user accounts will be able to view and access all areas and features of the system that are covered in this manual. An account's user roles and security permissions are determined when submitting a *SmartCareMCO Board Account Request/Change Form*.

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I. Requesting/Modifying a SmartCareMCO Account

1. To request the creation of a SmartCareMCO user account, or to request a modification to an already existing account, download the *SmartCareMCO Board Account Request/Change Form* and its associated *SmartCareMCO Board Account Request/Change Form Completion Instructions* document from <https://starkmhar.org/partner-solutions/smartcareresources/>.
2. Email the completed *SmartCareMCO Board Account Request/Change Form* as an attachment to SmartCareSupport@StarkMHAR.org.

Note: Please ensure that all required fields are populated and required handwritten signatures are present before submitting a form. Incomplete forms will not be processed and will be returned to the sender for completion.

3. A PartnerSolutions staff member should respond within one to three business days concerning the status of your form. If an account is being created for the first time, a username and a temporary password will be assigned to the account requester via the email address listed on the form.

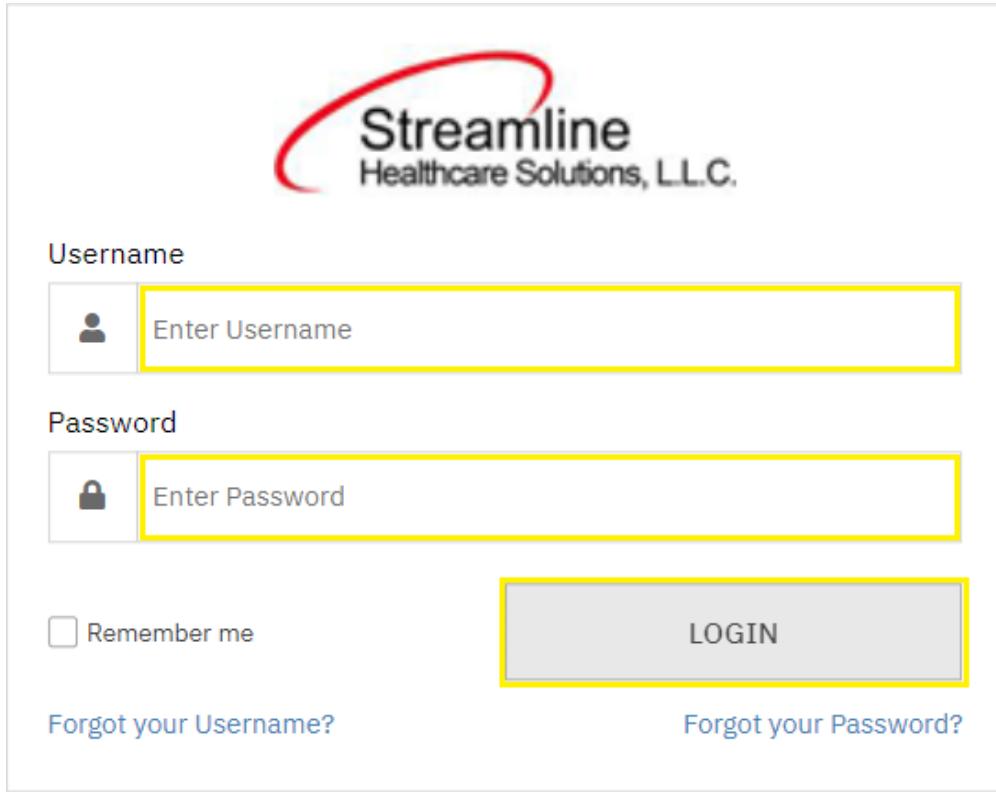
II. SmartCareMCO Basics

a.) Logging into SmartCareMCO

1. Use the following link to access SmartCareMCO:
<https://pssc.smartcarenetwork.com/PSSmartcarePROD/login.aspx>

Valid Web Browsers	Invalid Web Browsers
 Google Chrome (Recommended)	 Mozilla Firefox
 Microsoft Edge	 Safari

2. When logging into SmartCareMCO, it is highly recommended to use either Google Chrome (preferred) or Microsoft Edge. Using any other web browsers will likely result in potential problems or the system's user interface functioning incorrectly.



The image shows the Streamline Healthcare Solutions, L.L.C. login page. The Streamline logo is at the top. Below it are fields for 'Username' (with a person icon) and 'Enter Username', and 'Password' (with a lock icon) and 'Enter Password'. There is a 'Remember me' checkbox and a 'LOGIN' button. Below the fields are links for 'Forgot your Username?' and 'Forgot your Password?'

3. Enter the username and password associated with your SmartCareMCO account in the **Enter Username** and **Enter Password** fields, then click on **Login**.

2-Step Verification

Enter the Authentication Key sent to the Registered Device.

Authentication Key

Validate

Send Again

Cancel

[Do not have access to Device?](#)

- Upon logging in for the first time, you will be prompted to verify your identity via Two Factor Authentication (2FA). A 6-digit code will be sent to your email on file from Streamline Network Operations Center (dbmailer@streamlinehealthcare.com). Once you have received the email, enter the code provided within the **Authentication Key** field. Then, click **Validate**.

Security Question

Security Question What is the first name of your best friend?

Answer

2FA Sent in Email

Remember Me - This is a private computer or a computer that belongs to the organization.

Do Not Remember Me - This is a public or shared computer.

Submit

Cancel

[Have access to Device?](#)

Note: Following logins will instead queue a combined Security Question/2FA prompt. When prompted, enter your answer to the indicated Security Question within the **Answer** field. Security Question answers are case-sensitive. You will then receive a 6-digit code via email from Streamline Network Operations Center (dbmailer@streamlinehealthcare.com). Once you have received the email, enter the code provided within the **2FA Sent in Email** field. Then, click **Submit**.

Change Password

Username	<input type="text"/>
Old Password	<input type="text"/>
New Password	<input type="text"/>
Confirm Password	<input type="text"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

- When logging into SmartCareMCO for the first time, you will be prompted to reset your password. Passwords must contain a minimum of 14 characters, at least one capital character, at least one lowercase letter, at least one numeric character, and at least one special character (e.g., !@#\$%).

Username will auto-populate with your username. Enter your temporary password in the **Old Password** field, your new password in the **New Password** and **Confirm Password** fields, and then click on **OK**.

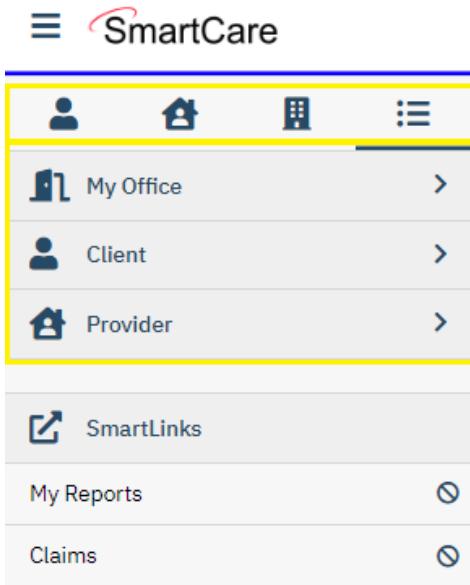
Note: Passwords are automatically reset by the system after 180 days and will be required to be changed upon logging in at that time.

Security Questions

Security Question 1	<input type="text"/>
Answer	<input type="text"/>
Security Question 2	<input type="text"/>
Answer	<input type="text"/>
Security Question 3	<input type="text"/>
Answer	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- When logging into SmartCareMCO for the first time, you will also be prompted to answer three security questions. Select **Security Questions 1-3**, enter your answers in the associated **Answer** fields, and then click on **Save**.

Note: Security Question answers are case-sensitive.

b.) General Layout

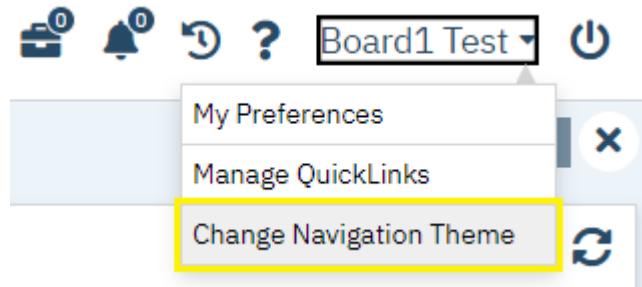
Along the left side of the screen are displayed Navigation Filters, Menus, and QuickLinks (previously called Banners). Select the icons placed near the top of the side panel to move between the four navigation filters – **Client**, **Provider**, **Other**, and **All**. Each navigation filter will list specific menus (e.g., My Office). Each menu will list specific QuickLinks (e.g., My Dashboard). By default, the navigation filter All is selected, listing all menus.

SmartCareMCO is divided into three separate menus accessible by Board staff – **My Office**, **Client**, and **Provider** – that are used to access specific QuickLinks that connect a user to all areas of the system. To access a QuickLink, click or hover your mouse over the desired menu, then click the intended QuickLink. You will then be directed to the corresponding screen.

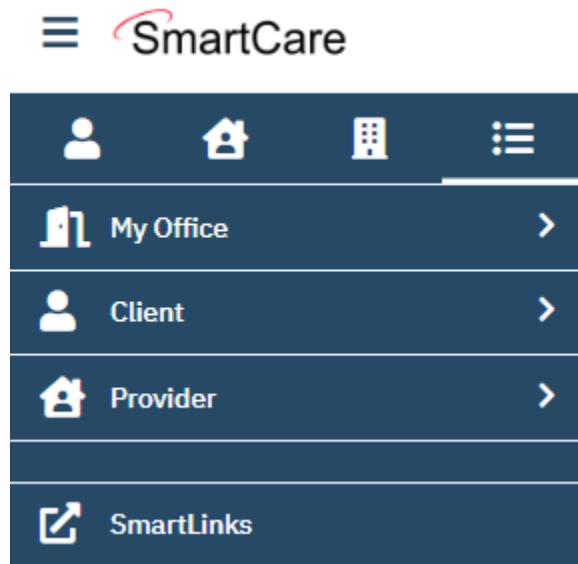
Note: Only one client and one provider may be opened in their respective menus at a time.

c.) Change Navigation Theme

SmartCare offers the option to change the theme of the Navigation Filters sidebar. More options may become available in the future.

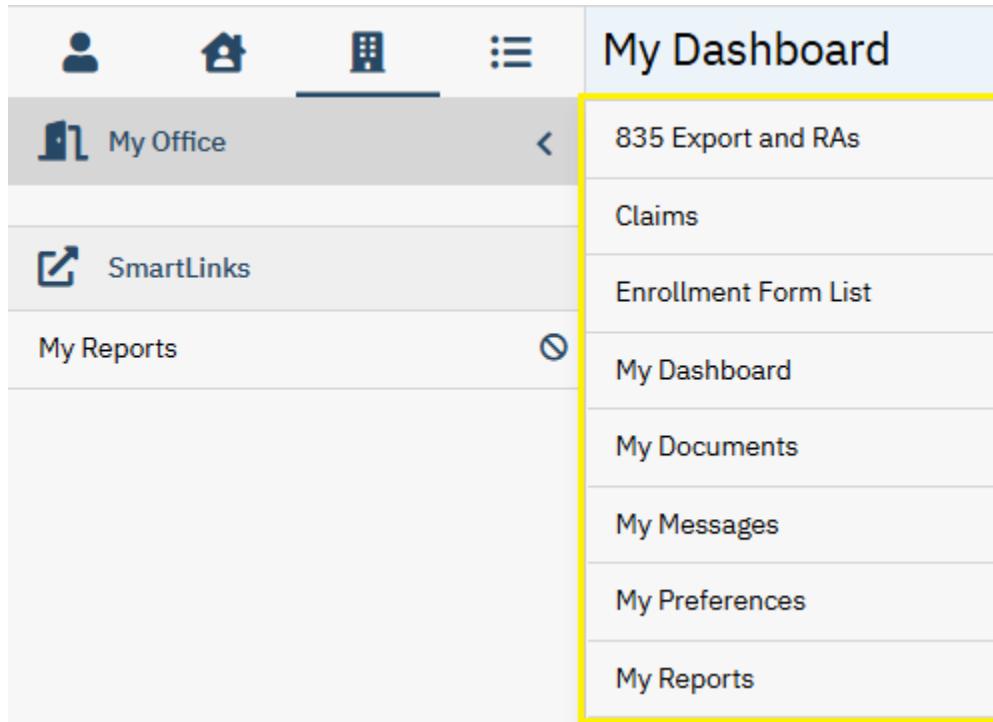


1. To change the look of your SmartCare Navigation Filters sidebar, click your username in the upper, righthand corner of the screen. Then, click Change Navigation Theme.



2. Your Navigation Theme has been changed.

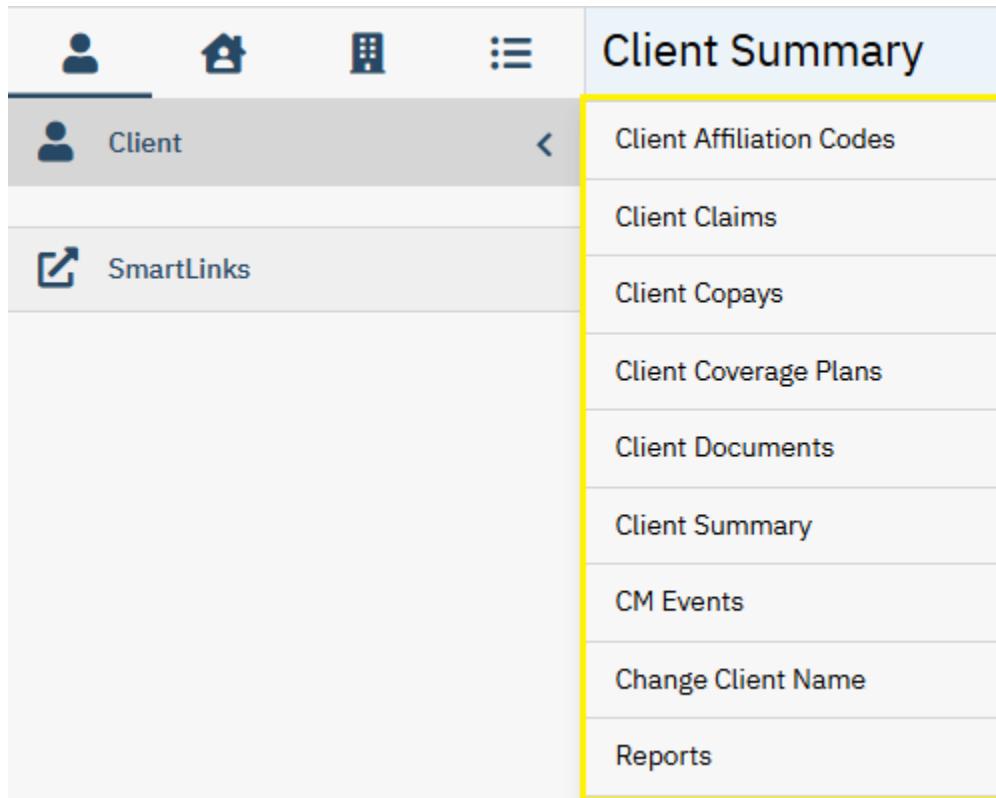
d.) My Office QuickLinks



- *835 Export and RAs* – View remittance advices associated with your Board that detail claim payments and denials.
(Accessible to Executive and Fiscal roles only.)
- *Claims* – View claims and their statuses associated with your Board.
(Accessible to all roles.)
- *Enrollment Form List* – View and access Enrollment Events associated with your Board.
(Accessible to Enrollment role only.)
- *My Dashboard* – View widgets that display hyperlinks for quick access to other areas of the system.
(Accessible to all roles.)
- *My Documents* – View enrollment documents completed by your user account.
(Accessible to Enrollment role only.)
- *My Messages* – Send/receive messages to/from PartnerSolutions staff members.
(Accessible to all roles.)
- *My Preferences* – Modify user account and contact information.
(Accessible to all roles.)

- *My Reports* – Access Board Helpdesk and Service reports.
(Accessible to all roles.)

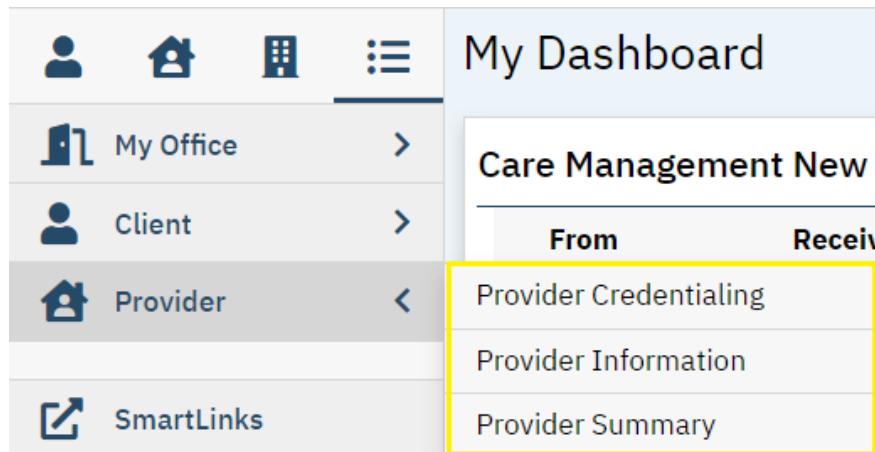
e.) Client QuickLinks



- *Client Affiliation Codes* – Create and view the selected client's affiliation codes/timespans.
(Accessible to all roles. Only Enrollment role may create and modify affiliation codes.)
- *Client Claims* – View the selected client's claims associated with your Board.
(Accessible to all roles.)
- *Client Copays* – View the selected client's current and past copays and their associated timespans.
(Accessible to all roles.)
- *Client Coverage Plans* – View the selected client's current coverage plan (i.e., Medicaid and/or Board) and their associated timespans.
(Accessible to all roles.)
- *Client Documents* – View the selected client's enrollment history.
(Accessible to all roles.)

- *Client Summary* – View a summary of the selected client’s demographic information.
(Accessible to all roles.)
- *CM Events* – Create and view the selected client’s CM Events documents including Enrollment Events and Authorization Events (if applicable).
(Accessible to Enrollment role only.)
- *Change Client Name* – Change the selected client’s first name, last name, and/or SSN.
(Accessible to Enrollment role only.)
- *Reports* – View and download the selected client’s client-specific reports.
(Accessible to all roles.)

f.) Provider QuickLinks



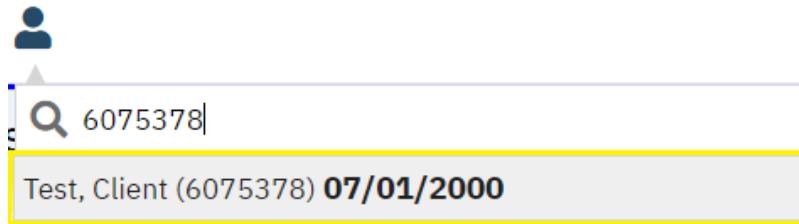
- *Provider Credentialing* – View the selected rendering provider’s credentialing.
(Accessible to all roles.)
- *Provider Information* – View the selected provider agency’s or rendering provider’s provider site setup.
(Accessible to all roles.)
- *Provider Summary* – View the selected provider agency’s information and claims history with your Board.
(Accessible to all roles.)

III. Client Search

a.) Searching by Name and ClientID



1. To search for a client by name or by Client UCI, click the Client Search icon, then enter the client's name (LastName, FirstName) or the client's Client UCI directly in the **Client Search** box.



2. Click on the client's name in the dropdown menu that appears if a valid match has been found. A client's Client UCI will appear in parentheses at the end of their name. The client's date of birth will be listed following the client's name and UCI.
3. The client you searched for will now be opened in the **Client** menu.

b.) Searching by Social Security Number



1. To search for a client by social security number, click the Client Search icon. Then, click on **< Client Search >**.

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 First Name Program

Other Search Strategies

SSN Search	DOB Search	Phone # Search
Primary Clinician Search	Master Client ID Search	Client ID Search
Authorization ID / #		Insured ID Search

2. In the pop-up that appears, enter the client's social security number in its respective field, then click on **SSN Search**.

Records Found

	ID	Master ID	Client Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/>	6075378	6075378	Test, Client	9999	07/01/2000	Active	Canton	

Create New Potential Client **Select** **Cancel**

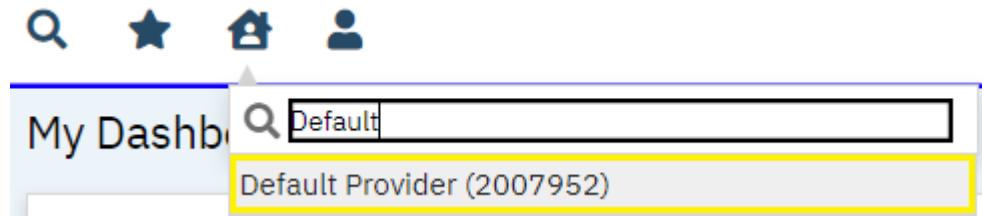
3. Click on **Select** if a valid client match has been found for that social security number. If more than one search result appears, click on the radio button to the left of the client you are attempting to open before clicking on **Select**.
4. The client you searched for will now be opened in the **Client** menu.

IV. Provider Search

a.) Searching by Provider Agency



1. To search for a provider agency by name, click the Provider Search icon, then enter the name directly in the **Provider Search** box that populates.



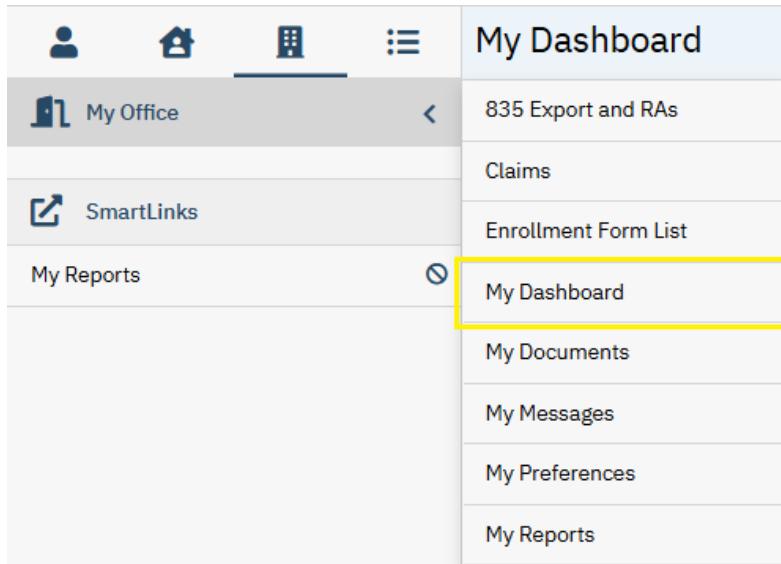
2. Click on the provider's name in the dropdown menu that appears if a valid match has been found.
3. The provider agency you searched for will now be opened in the **Provider** menu.

V. My Dashboard

The **My Dashboard** screen is used to view widgets that display hyperlinks for quick access to other areas of the system.

a.) Alerts and Messages Widget

- *Care Management New Alerts/Messages Widget* – View unread messages sent to your user account.
(Accessible to all roles.)



1. While in the **My Office** menu, click on **My Dashboard**.

Care Management New Alerts/Messages				
From	Received	Member	Subject	Message
Test,...	04/03/2023		Please Assist	Hello! Can you pleas...

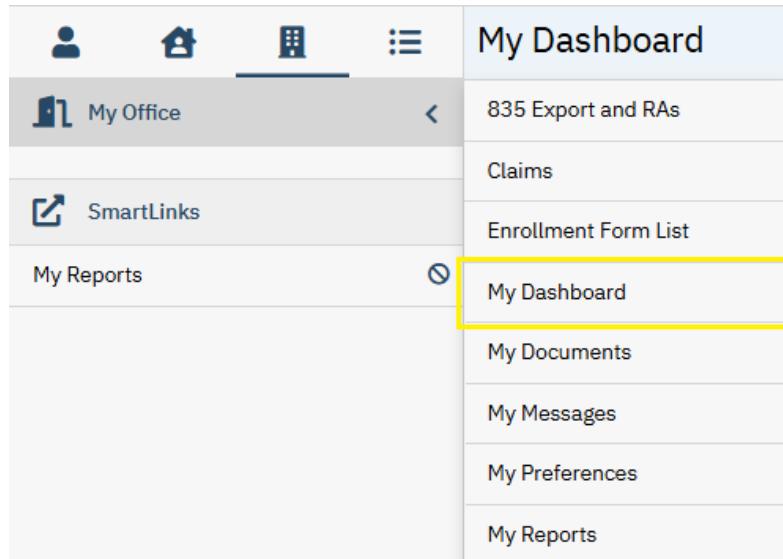
2. Click on a hyperlink under **Subject** to view an unread message.

Note: PartnerSolutions' preferred method of contact is via email at SmartCareSupport@starkmhar.org. SmartCare Messages should rarely be utilized.

b.) Enrollment Form Widget

Enrollment Form Widget – View Enrollment requests that are completed, in progress, or that need to be reviewed.

(Accessible to Enrollment role only.)



1. While on the **My Office** menu, click on **My Dashboard**.

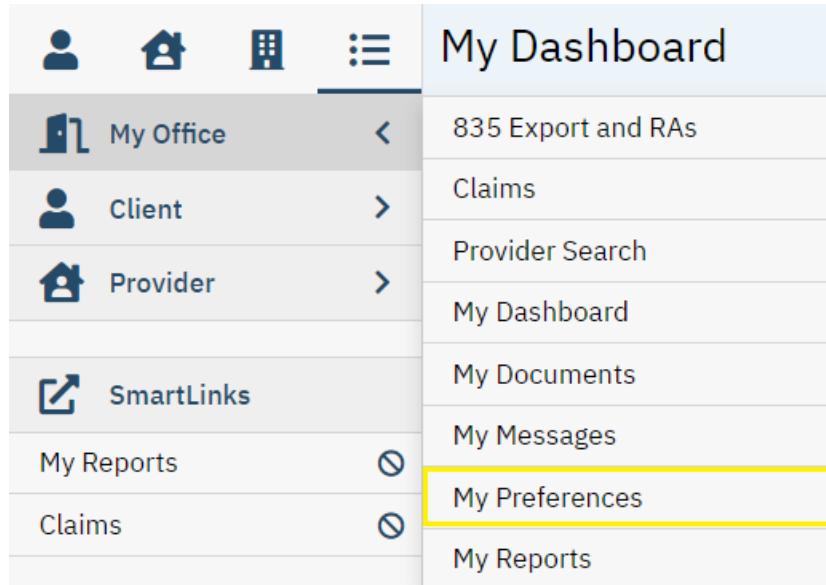
The image shows the 'Enrollment Form' widget. It has two dropdown menus at the top: 'All Insurers' and 'All Providers', both of which are highlighted with yellow boxes. Below these are three status filters: 'To Review' (0), 'In Progress' (1), and 'Completed' (0). A horizontal scrollbar is visible at the bottom of the widget.

2. Click within the **All Insurers** field to select a specific Board Insurer or leave as is. Click within the **All Providers** field to select a specific provider agency or leave as is. Click the number hyperlink corresponding to the desired status. You will be redirected to the Enrollment Form List page filtered upon this status.

VI. My Preferences

The **My Preferences** screen is used to update a user's contact information (e.g., phone number and email address) and account information (e.g., password and security questions/answers).

a.) Modifying a Password

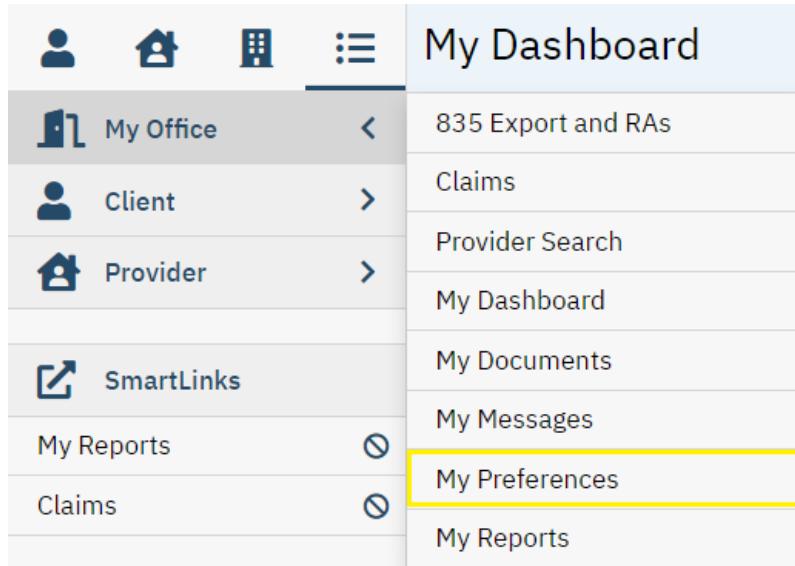


1. While in the **My Office** menu, click on **My Preferences**.

Account	
User Name	Board1.Test
Password	[REDACTED]
Confirm Password	[REDACTED]

2. Enter your desired password in the **Password** and **Confirm Password** fields, then click on **Save**.

Note: Passwords must contain a minimum of 14 characters, at least one capital character, at least one lowercase letter, at least one numeric character, and at least one special character (e.g., !@#\$%).

b.) Modifying Security Questions

1. While in the **My Office** menu, click on **My Preferences**.

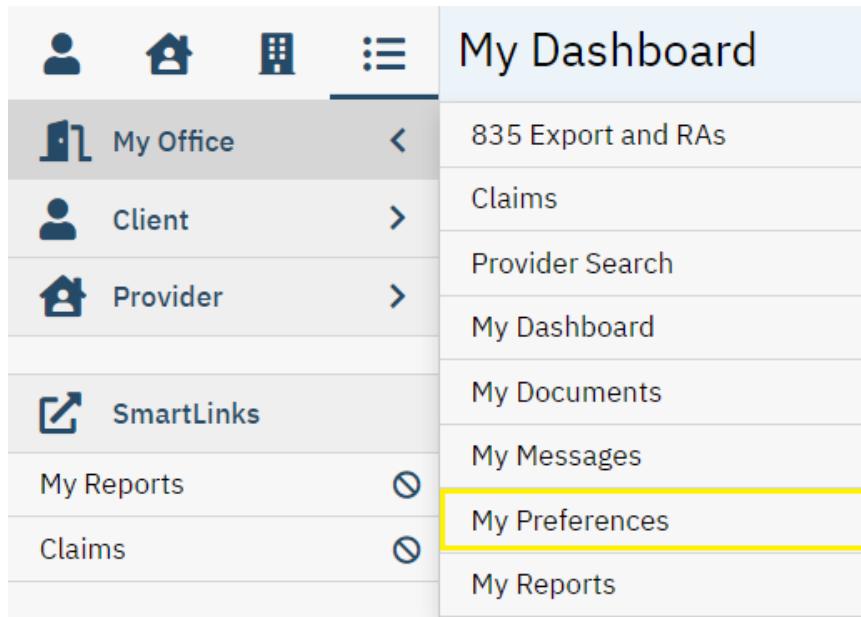
Security Questions

Security Question 1	<input type="text"/>	<input type="button" value="▼"/>
Answer	<input type="text"/>	
Security Question 2	<input type="text"/>	<input type="button" value="▼"/>
Answer	<input type="text"/>	
Security Question 3	<input type="text"/>	<input type="button" value="▼"/>
Answer	<input type="text"/>	

2. Select **Security Questions 1-3**, enter your answers in the associated **Answer** fields, and then click on **Save**.

Note: Security Question answers are case-sensitive.

c.) Modifying a Phone Number

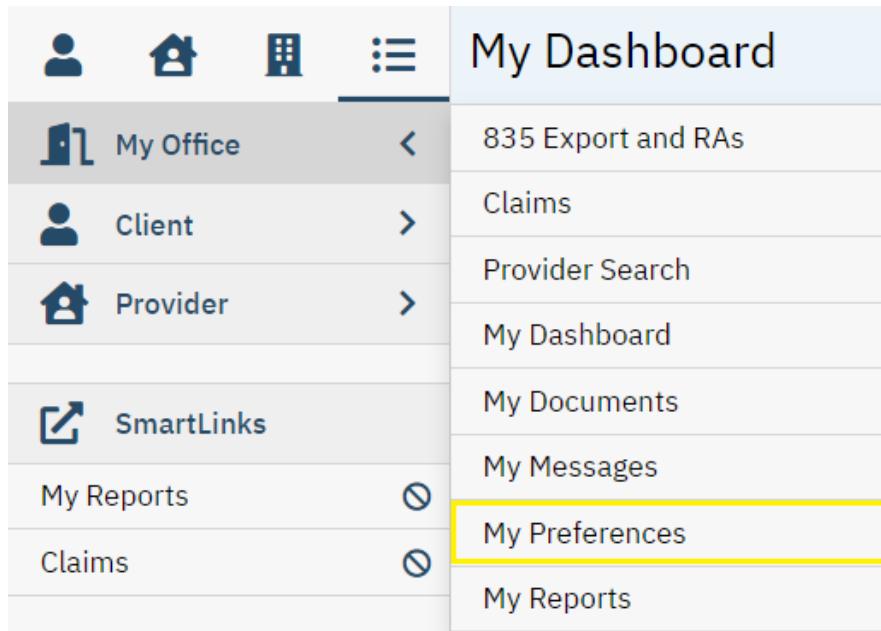


1. While in the **My Office** menu, click on **My Preferences**.

The image shows a 'Contact' page. It has two input fields: 'Phone' and 'E-mail Id'. The 'Phone' field contains a yellow redacted value, and the 'E-mail Id' field is empty.

2. Enter the phone number you wish to be associated with your user account in the **Phone** field, then click on **Save**.

d.) Modifying an Email Address



1. While in the **My Office** menu, click on **My Preferences**.

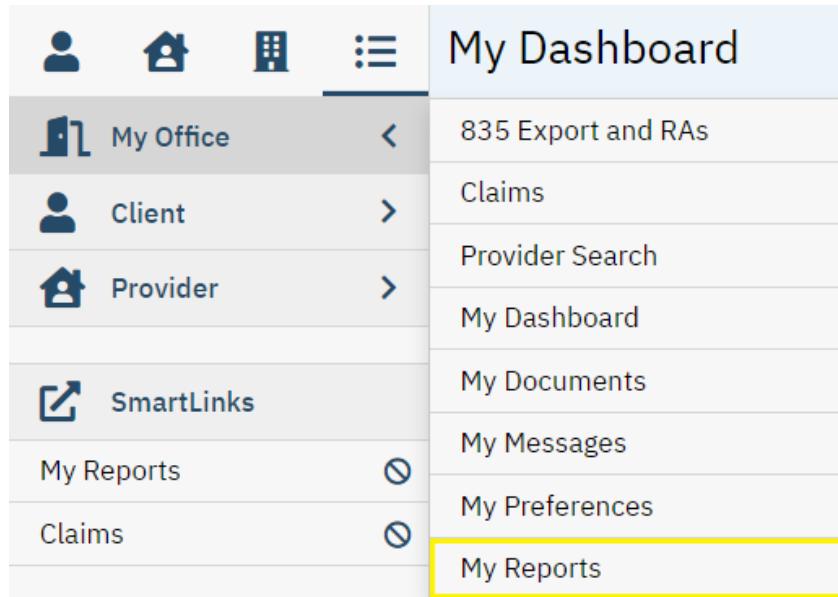
The image shows a screenshot of a 'Contact' page. At the top, it says 'Contact'. Below that, there are two fields: 'Phone' with an empty input box and 'E-mail Id' with a yellow box highlighting the input field.

2. Enter the email address you wish to be associated with your user account in the **E-mail Id** field, then click on **Save**.

VII. My Reports

The **My Reports** screen is used to access a number of reports provided by PartnerSolutions directly in SmartCare (e.g., PS Provider Contract Rate Lookup, PS Rendering Provider Lookup, etc.). More reports will be added in the future. You can suggest reports that you may find helpful to access in SmartCare by contacting SmartCareSupport@StarkMHAR.org.

a.) Accessing My Reports



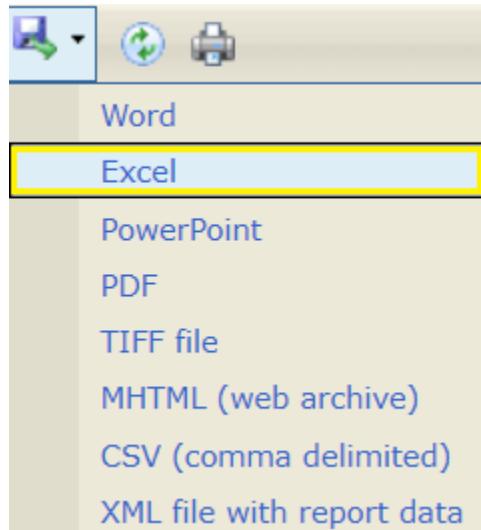
1. While in the **My Office** menu, click on **My Reports**.

All Folders	Report Name	Description	Folder
	Provider Contract Rate Lookup	Lists all contracted rates associated...	Board Help Desk
	PS 835 Reason Codes	835 Reason Code to SmartCare Reason Co...	Board Help Desk
	PS Allowable Diagnosis Codes	List of Allowable Diagnosis Codes for...	Board Help Desk
	PS Billing Codes and Billing C...	List of active Billing Codes along wit...	Board Help Desk
	PS Current Week Claim Summary	Summary of Current Week Claims that ha...	Board Service Reports
	PS Rendering Provider Lookup	Look up Rendering Provider Information	Board Help Desk
	PS SmartCare Co-Pay Exclusions	List of Active SmartCare Co-Pay Exclus...	Board Help Desk
	PS SmartCare Medicaid Plan Exc...	List of SmartCare Medicaid Plan Exclus...	Board Help Desk
	PS SmartCare Pended Claim Rule...	List of SmartCare Pended Claims Rules	Board Help Desk

2. Ensure that **All Folders** is selected. Then, click **Apply Filter**. Click on the hyperlink of the desired report under **Report Name**. This will open a new window.



3. Depending on the selected report, the report may automatically generate, or specific data fields will be required to be completed to generate the report. Once populated, to export the report, click the **Export** button (floppy disc icon).



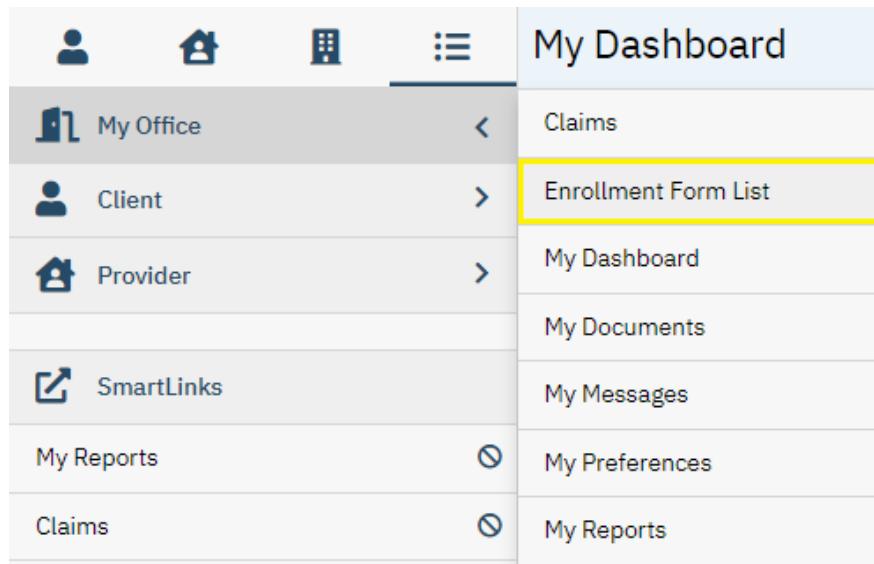
4. Select from the dropdown list in which format you wish to export your report. To export your report into a Microsoft Excel spreadsheet, select **Excel**.

VIII. Enrollment Process

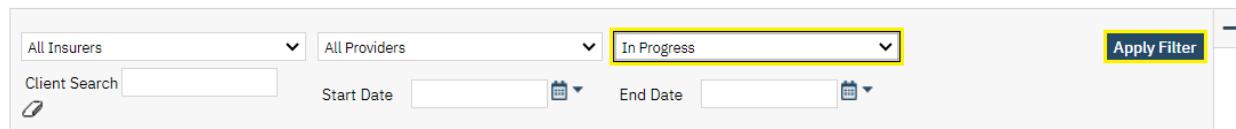
(Accessible to Enrollment role only.)

Note: If you do not currently have the Enrollment role, please complete a new *SmartCareMCO Board Account Request/Change Form* requesting this change. You can download this form at <https://partnersolutions.starkmhar.org/data-analytics/>. Please submit your completed form to SmartCareSupport@starkmhar.org.

a.) Completing a Provider-submitted Enrollment in SmartCareMCO



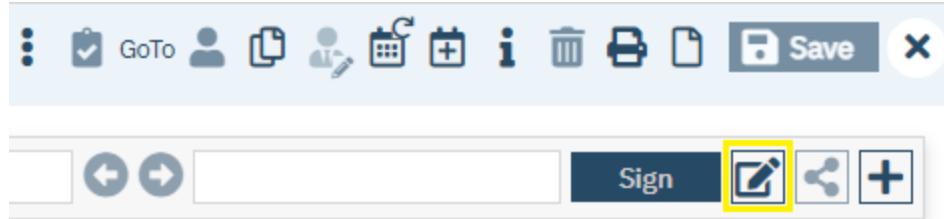
1. While on the **My Office** menu, click on **Enrollment Form List**.



2. Click within the Status search field. Select “In Progress” from the dropdown list that populates. Then, click **Apply Filter**.

Client Name	Effective Date	Insurer	Provider	Status	Author
John, Doe (6090781)	07/01/2023 11:09 ...	Ashland BH	Appleseed Community...	In Progress	Test, Provider1

3. Select the “In Progress” hyperlink under Status of the desired enrollment. You will be directed to the Enrollment Form Event screen.



4. To review and sign the enrollment, click the **Edit** icon.

Event **Note**

Details

Event	<input type="text"/>
Date	<input type="text"/> <input type="text"/> Time
Staff	<input type="text"/>
Status	<input type="text"/>
Insurer	<input type="text"/>
Provider	<input type="text"/>

5. Review Event Details for accuracy:

Event: Required. This field should list “Enrollment Form Event.”

Date: Required. This field should list the appropriate effective date for the client’s enrollment.

Time: Required. This field auto-populates when the provider staff person creates the event to list the then-current time. This field value does not affect the enrollment.

Staff: Required. This field auto-populates when the provider staff person creates the event to list the staff’s username. This field value cannot be changed.

Insurer: Required. This field should list the appropriate Board Insurer associated with the submitting agency.

Provider: Required. This field should list the appropriate submitting agency.

Event **Note**

6. Click on the **Note** tab.



Client Finance Verifications Attachments

Provider Information

*Submitting Provider Requested Date

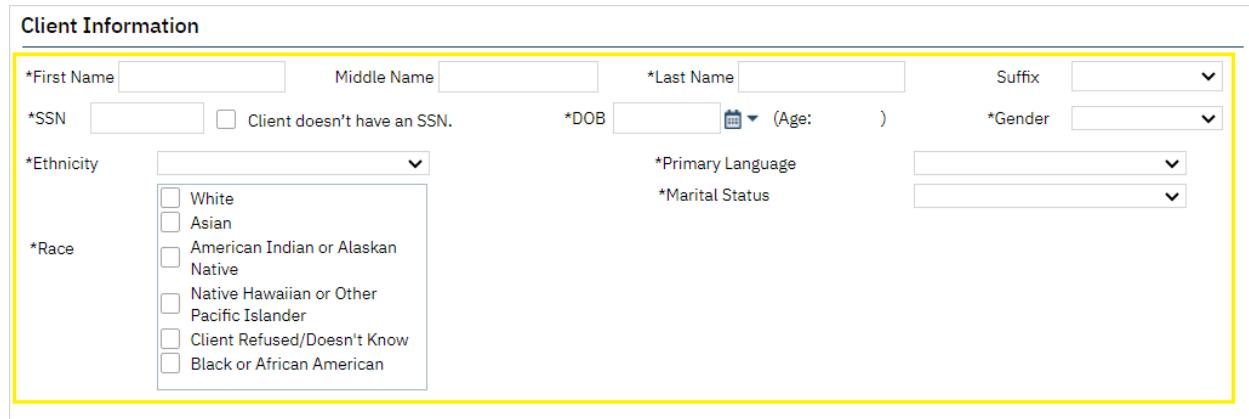
Previous Other Insurer

7. Review Client Provider Information for accuracy:

Submitting Provider: **Required.** This field should list the appropriate submitting agency.

Requested Date: This field may list the date on which the submitting provider created the enrollment event.

Previous Other Insurer: This field may list any Board Insurers which the client was previously associated with.



Client Information

*First Name Middle Name *Last Name Suffix
 *SSN Client doesn't have an SSN. *DOB (Age:) *Gender
 *Ethnicity
 White Asian American Indian or Alaskan Native Native Hawaiian or Other Pacific Islander Client Refused/Doesn't Know Black or African American
 *Race

8. Review Client Information for accuracy:

First Name: **Required.** This field should list the client's first name. Ensure proper spelling.

Middle Name: This field may list the client's middle name. Ensure proper spelling.

Last Name: **Required.** This field should list the client's last name. Ensure proper spelling.

Suffix: If applicable, this field may include the appropriate suffix for the client.

SSN: **Required.** This field should list the client's Social Security Number. (If the client does not have a Social Security Number, the **Client doesn't have an SSN** checkbox will be checked.)

DOB: **Required.** This field should list the client's Date of Birth.

Gender: **Required.** This field should list the client's biological sex. (If unknown, not listed, or not disclosed, "Client Refused/Doesn't Know" may be selected.)

Ethnicity: **Required.** This field should list the client's ethnicity. (If unknown, not listed, or not disclosed, "Client Refused/Doesn't Know" may be selected.)

Race: **Required.** The check box(es) corresponding to the client's racial background should be checked. Multiple values should be checked for biracial and multiracial clients. (If unknown, not listed, or not disclosed, "Client Refused/Doesn't Know" may be selected.)

Primary Language: **Required.** This field should list the client's primary language. This field is defaulted to English.

Marital Status: **Required.** This field should list the client's marital status. (If unknown, not listed, or not disclosed, "Client Refused/Doesn't Know" may be selected.)

Residency and Contact Information

*Address 1	Address 2		
*City	*State <input type="text" value="Ohio"/>	*ZIP	*County of Residence
Primary Phone No.	Secondary Phone No.	*County of Financial Responsibility	
Client is Homeless <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A			

9. Review Client Residency and Contact Information for accuracy:

Address 1: **Required.** This field should list the client's full, physical street address (e.g., "101 Main Street" rather than "101 Main"). If the client is homeless, this field should list "Homeless."

Address 2: This field may list the second line of the client's physical address (e.g., an apartment or lot number when applicable).

City: **Required.** This field should list the client's physical city of residence. If the client is homeless and living in a shelter, the shelter's city should be listed.

State: **Required.** This field should list the client's physical state of residence. This field is defaulted to Ohio.

ZIP: Required. This field should list, at minimum, the first five digits of the client's physical address ZIP code. If the client is homeless and living in a shelter, the shelter's ZIP code should be listed.

County of Residence: Required. This field should list the client's county of residence that corresponds with their physical address.

County of Financial Responsibility: Required. This field should list the county that is financially responsible for the client's treatment/services.

Primary Phone No.: This field may list the client's primary phone number including the area code.

Secondary Phone No.: This field may list the client's secondary phone number including the area code.

Client is Homeless: This field should display the client's homeless status. This field is defaulted to N/A.

Additional Information

Special Populations	<input type="text"/>	House Bill 131	<input type="text"/>
Notes	<input type="text"/>		

10. Review Client Additional Information for accuracy:

Special Populations: This field may list any applicable special populations the client belongs to.

House Bill 131: This field should display the client's status on receiving treatment services paid for by a court-utilized Indigent Driver Alcohol Treatment Fund. This field is defaulted to N/A.

Notes: This field can be filled in freely to add any additional notes related to the client.

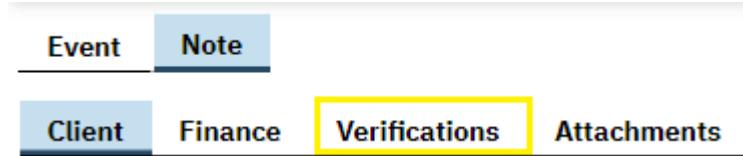
Household Information

*Household Size	<input type="text"/>	*Adjusted Gross Monthly Income \$	<input type="text"/>
-----------------	----------------------	-----------------------------------	----------------------

11. Review Client Household Information for accuracy:

Household Size: **Required.** This field should list the client's household size.

Adjusted Gross Monthly Income: **Required.** This field should list the client's family's adjusted gross monthly income.



12. Click on the **Verifications** sub-tab.

Verifications			
Form	Forms Given to Client or Guardian		
*Disclosure of enrollment?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
*All applicable authorizations for billing as required by Federal and State laws have been received?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
*In crisis at enrollment?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
Client is potentially SPMI/SED	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
Residency verification form signed?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
Proof of household income?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable
Proof of identity?	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable

13. Review Verifications for accuracy:

Disclosure of enrollment?: **Required.** The enrollment cannot be completed if this value is anything other than “Yes” unless the client was in crisis at enrollment, in which case verbal consent should still be obtained by the Provider, and the information should be collected as quickly as possible and the enrollment updated. This field should display the status concerning whether the client or their legal custodian signed disclosure of enrollment documentation.

All applicable authorizations for billing as required for billing as required by Federal and State laws have been received?: **Required.** The enrollment cannot be completed if this value is anything other than “Yes” unless the client was in crisis at enrollment, in which case verbal consent should still be obtained by the Provider, and the information should be collected as quickly as possible and the enrollment updated. This field should display the status concerning whether the client or their legal custodian signed all applicable authorizations required to receive services.

In crisis at enrollment?: **Required.** The enrollment cannot be completed if this value is anything other than “Yes” or “No.” This field should display the status concerning whether the client was in a crisis situation at the time of enrollment at the submitting agency.

Client is potentially SPMI/SED?: Required. Not Applicable may be selected. This field should display the status concerning whether the client appears likely to qualify as having a “serious and persistent mental illness” (SPMI) or as being “severely emotionally disturbed” (SED) by the submitting agency. The submitting agency may select “Not Applicable” if this data is not collected. If your insuring Board requires this information, please notify your contracted provider agencies.

Residency verification form signed?: Required. Not Applicable may be selected. This field should display the status concerning if the client or their legal custodian signed a residency verification form. The submitting agency may select “Not Applicable” if this data is not collected. If your insuring Board requires this information, please notify your contracted provider agencies.

Proof of household income?: Required. Not Applicable may be selected. This field should display the status concerning whether the client or their legal custodian provided proof of household income (e.g., paystubs, bank statements, benefit letters). The submitting agency may select “Not Applicable” if this data is not collected. If your insuring Board requires this information, please notify your contracted provider agencies.

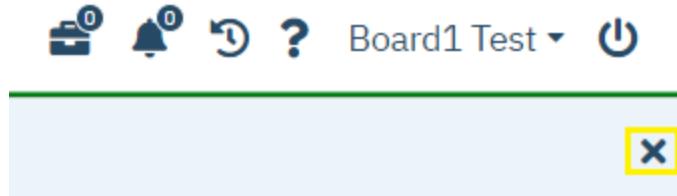
Proof of identity?: Required. Not Applicable may be selected. This field should display the status concerning whether the client or their legal custodian provided proof of their identity. The submitting agency may select “Not Applicable” if this data is not collected. If your insuring Board requires this information, please notify your contracted provider agencies.

Event	Note
Client	Finance
Verifications	Attachments

14. Click on the **Attachments** sub-tab.

Client	Finance	Verifications	Attachments
Scan	Upload		
Record Description	Attached Date		
X TEST 08/30/2023	08/30/2023		

15. If applicable, review any attached files by clicking the hyperlink under Record Description of the desired file.



16. Once you have reviewed the attached document, click “X” in the upper-right corner of the screen to exit view. You will be returned to the Enrollment Form Event page pre-reviewing. To re-open the enrollment form to continue reviewing/to sign, click the **Edit** (edit icon) as outlined previously in **Step 4**.
17. If after you have reviewed the enrollment form in its entirety and have determined that it is accurate and ready to sign, continue onto the next Step (**To Sign**). If after you have reviewed the enrollment form in its entirety and have determined that it is errored and needs to be reviewed and corrected by the submitting provider, continue to **Step 25 (To Review)**.



18. **To Sign:** Click on the **Finance** sub-tab.

Coverage Information			
Plan	Insured ID	Group ID	Comment
			Add

19. Click on **Add**.

Coverage Information			
Plan	Insured ID	Group ID	Comment
X			Add

20. Select the appropriate Board coverage plan. Only one Board plan should ever be visible at a time under **Coverage Information**. If an additional Board plan is listed, click the “X” button to its left to remove it.

Financial Information			
*Member Copay	% or \$	Medicaid Managed Care Plan	

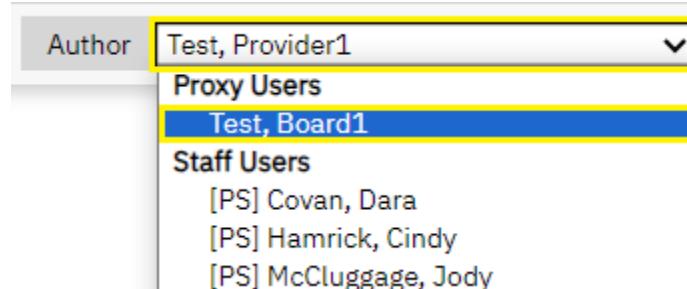
21. Enter the appropriate Financial Information:

Member Copay %: **Required.** Enter the client's copay based upon the client's Household Size and Adjusted Gross Monthly Income listed within the previous page. Copay percentages may only be entered in increments of five (e.g., 0, 5, 10, 15, and so on).

Medicaid Managed Care Plan: Select the client's Medicaid managed care plan if applicable.



22. Click the **Save** button.



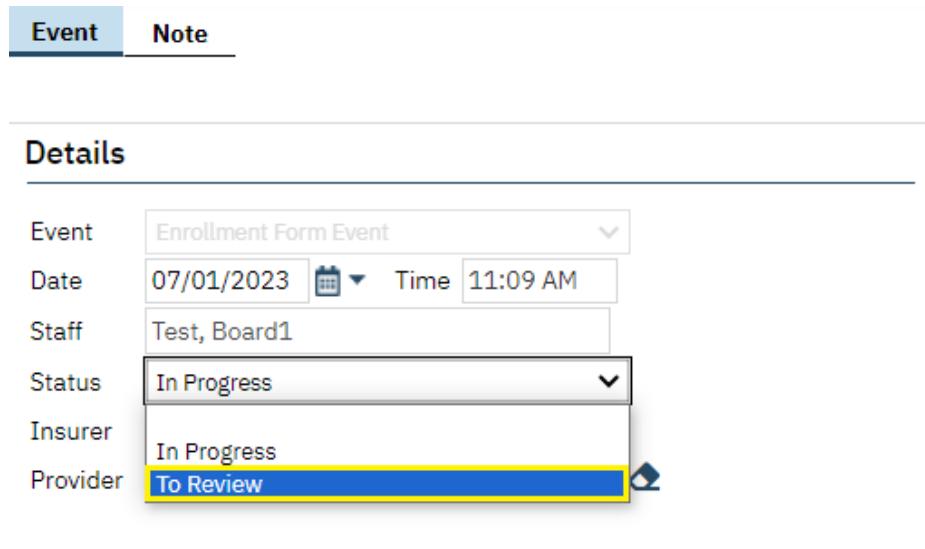
23. Click within the **Author** field. Then, select your username under Proxy Users.



24. Then, click **Sign**. The enrollment is now complete.



25. **To Review:** If the enrollment is inaccurate or incomplete and needs to be reviewed by the submitting provider, click on the **Event** tab.



Event Note

Details

Event: Enrollment Form Event

Date: 07/01/2023 Time: 11:09 AM

Staff: Test, Board1

Status: In Progress

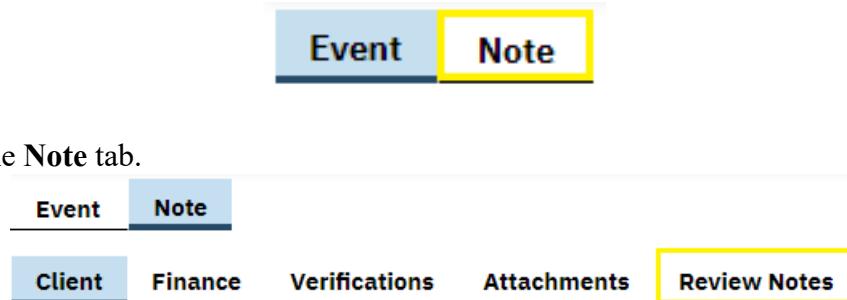
Insurer:

Provider:

In Progress

To Review

26. Click within the Status field. Then, select **To Review**.



Event Note

Client **Finance** **Verifications** **Attachments** **Review Notes**

27. Click on the **Note** tab.



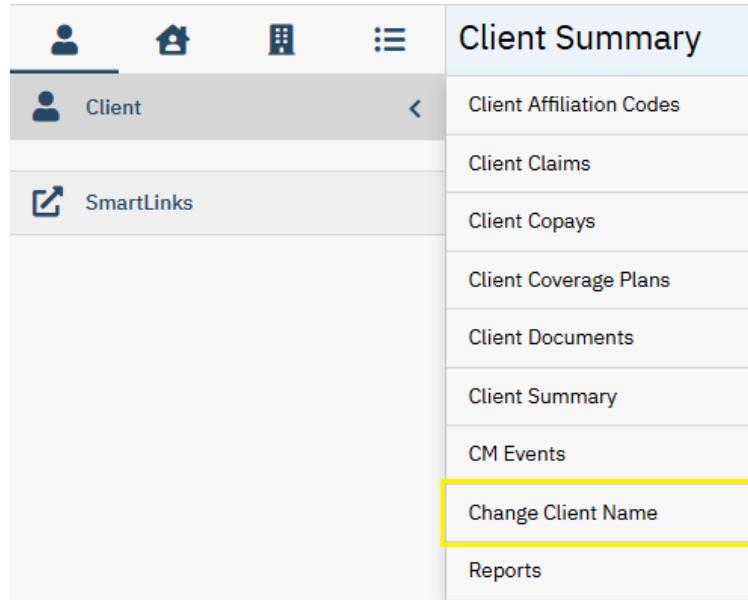
What Corrections are needed:

28. Enter any corrections that need to be made within the field titled, “What Corrections are needed.”



30. Then, click **Save**. The submitting provider will be prompted to make corrections. Once corrected, the submitting provider will return the enrollment form to an “In Progress” status for Board review.

b.) Changing a Client's Name



1. While in the **Client** menu (i.e., the desired client is opened), click on **Change Client Name**.

General Information

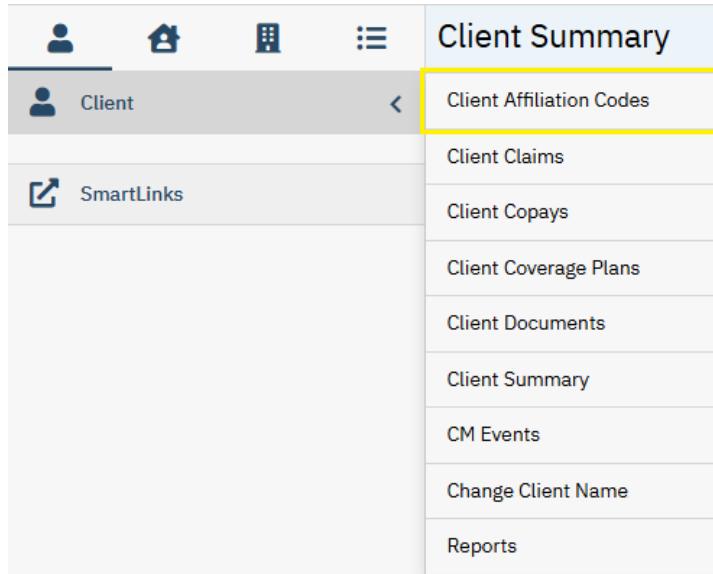
Type of Client Individual Organization

Client ID 6084882	SSN 9999 Modify...	Status	Medicaid ID
Prefix ▼	First Name <input type="text"/>	Last Name <input type="text"/>	Middle Name <input type="text"/> Suffix ▼
E-Mail <input type="text"/>	Professional Suffix <input type="text"/>		

2. Enter the client's updated names in the **First Name** and **Last Name** fields, then click on **Save**.

Note: Do not attempt to change any other information about the client other than their first and last names or SSN while in the **Change Client Name** QuickLink.

c.) Adding an Affiliation Code



1. While in the **Client** menu (i.e., the desired client is opened), click on **Client Affiliation Codes**.



2. Click on the **New** icon.

The image shows a 'General' client information form. It includes fields for Program Name (highlighted with a yellow box), Client (selected), Assigned Staff, Comment, Primary, Current Status, Requested Date, Enrolled Date, Discharged Date, and Next Schedule Service. The 'Program Name' dropdown shows 'Test, Client'.

3. Select the applicable affiliation code under **Program Name**.

- *507DE* – Select for the Multi-County Collaborative Detox affiliation code.
- *AMDE* – Select for the Ambulatory Detox affiliation code.
- *DRUG* – Select for the Drug Court & Adolescent Reentry affiliation code.
- *FPRP* – Select for the Forensic Partnership Recovery Program affiliation code.
- *HA03* – Select for the Ashland Hardship affiliation code.

- *HA32* – Select for the Hancock Hardship affiliation code.
- *MEAD* – Select for the Medicaid Expansion Application Denied affiliation code.
- *MEAP* – Select for the Medicaid Expansion Application Pending affiliation code.
- *MEMC* – Select for the Medicaid Expansion Client Ineligible affiliation code.
- *PG* – Select for the Problem Gambling affiliation code.
- *RSAT* – Select for the Residential Substance Abuse Treatment affiliation code.
- *SHPC* – Select for the Shelter Plus Care affiliation code.
- *TASC* – Select for the Criminal Justice Pass Through affiliation code.
- *TPME* – Select for the Turning Point Men's Program affiliation code.
- *TXX* – Select for the Title XX affiliation code.

General

Program Name	<input type="text"/>	<input type="checkbox"/> Primary	Current Status	<input style="outline: 2px solid yellow;" type="text"/>
Client...	<input type="text" value="Test, Client"/>		Requested Date	<input style="outline: 2px solid yellow;" type="text"/>
Assigned Staff	<input type="text"/>		Enrolled Date	<input style="outline: 2px solid yellow;" type="text"/>
Comment	<input type="text"/>		Discharged Date	<input style="outline: 2px solid yellow;" type="text"/>
			Next Schedule Service	

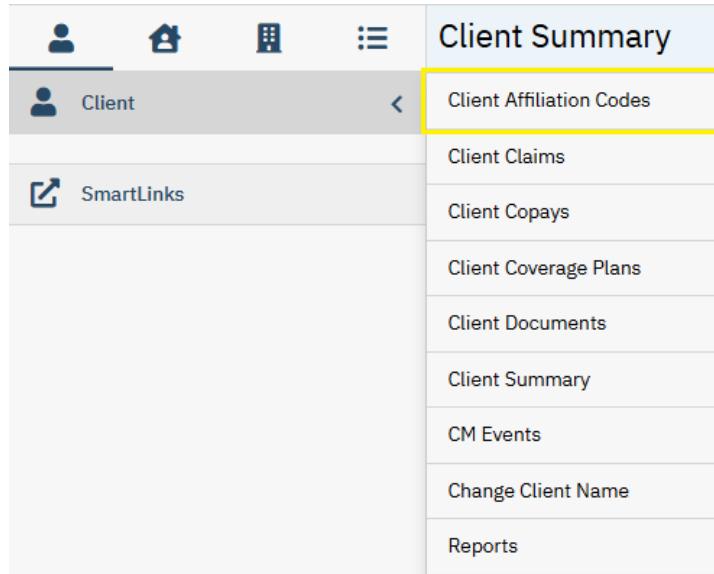
4. Select “Enrolled” under **Current Status.**

General

Program Name	<input type="text"/>	<input type="checkbox"/> Primary	Current Status	<input type="text"/>
Client...	<input type="text" value="Test, Client"/>		Requested Date	<input type="text"/>
Assigned Staff	<input type="text"/>		Enrolled Date	<input style="outline: 2px solid yellow;" type="text"/>
Comment	<input type="text"/>		Discharged Date	<input type="text"/>
			Next Schedule Service	

5. Enter the effective (start) date of the affiliation code under **Enrolled Date, then click on **Save**.**

d.) Terminating an Affiliation Code



1. While in the **Client** menu (i.e., the desired client is opened), click on **Client Affiliation Codes**.

All Programs		All Statuses		Other		Apply Filter	
Program Name	Status	Enrolled	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
PG	Enrolled	07/01/2022		Yes			

2. Click on the hyperlink under **Status** to view that affiliation code.

General							
Program Name	PG	Primary	Current Status	Discharged			
Client...	Test, Client		Discharge Reason				
Assigned Staff			Requested Date				
Comment			Enrolled Date	07/01/2022			
			Discharged Date				
			Next Schedule Service				

3. Select “Discharged” under **Current Status**.

General

Program Name	PG	<input checked="" type="checkbox"/> Primary	Current Status	Discharged
Client...	Test, Client		Discharge Reason	
Assigned Staff			Requested Date	
Comment			Enrolled Date	07/01/2022
			Discharged Date	
			Next Schedule	
			Service	

4. Enter the end date of the affiliation code under **Discharged Date**, then click on **Save**.

e.) Residency Verification Form

1. The latest version of the *SmartCareMCO Residency Verification Form* can be downloaded from <https://starkmhar.org/partner-solutions/smartcareresources/>.
2. As of 01/01/18, the same residency rules in place for enrollments in MACSIS will apply to enrollments in SmartCareMCO. These rules will be updated in the future as appropriate.

f.) Enrolling a New Organization (“Pseudo”) Client



1. To enroll a new organization client, click the Client Search icon. Then, click on < Client Search >.

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

Organization Name Program

2. Click on **Organization**.

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

Organization Name Program

Other Search Strategies

EIN Search	<input type="text"/>	Phone # Search	<input type="text"/>
DOB Search	<input type="text"/>	Master Client ID Search	<input type="text"/>
Primary Clinician Search	<input type="text"/>	Client ID Search	<input type="text"/>
Authorization ID / #	<input type="text"/>	Insured ID Search	<input type="text"/>

3. These three steps must be followed before creating a new organization client:

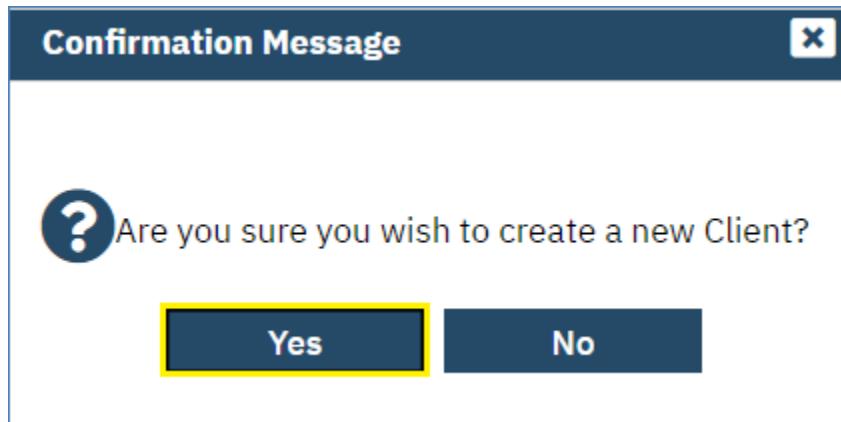
- Enter the client’s desired name in the **Organization Name** field, then click on **Broad Search**.
- Enter “9999999999” as the client’s EIN in its respective field, then click on **EIN Search**.
- Enter “07/01/2000” as the client’s date of birth, then click on **DOB Search**. This date is used as the default DOB for all organization clients.

Records Found

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

[Create New Potential Client](#) [Select](#) [Cancel](#)
[Registration](#) [Inquiry \(Selected Client\)](#) [Inquiry \(New Client\)](#)

4. Click on **Create New Potential Client**.



5. In the pop-up that appears, click on **Yes**. The client you created will now be opened in the **Client** menu.

Details

Event	<input type="text" value="Enrollment Form Event"/>
Date	<input type="text" value="Enrollment Form Event"/>
Staff	<input style="background-color: #0070C0; color: white; border: 2px solid #0070C0;" type="text" value="Enrollment Form Event"/>
Status	<input type="text"/>
Insurer	<input type="text"/>
Provider	<input type="text" value="Search here"/>

6. You will be redirected to the Client CM (Care Management) Events screen. Within the Event Details section, click within the **Event** field. Then, select **Enrollment Form Event**.

Details

Event	Enrollment Form Event
Date	07/01/2024  Time 12:00 AM
Staff	Test, Board1
Status	
Insurer	
Provider	Search here 

7. Enter the pseudo-client's enrollment effective date within the **Date** field. This date is typically the beginning date of the current or previous SFY.
8. Enter the value "12:00 AM" within the **Time** field. Time does not affect billing.

Details

Event	Enrollment Form Event
Date	07/01/2024  Time 12:00 AM
Staff	Test, Board1
Status	
Insurer	
Provider	 In Progress To Review

9. Click within the **Status** field, then select **In Progress**.

Details

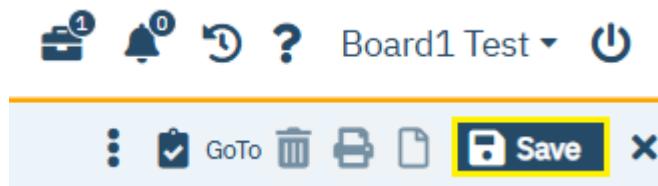
Event	Enrollment Form Event
Date	07/01/2024 <input type="button" value="Calendar"/> Time 12:00 AM
Staff	Test, Board1
Status	In Progress
Insurer	Ashtabula BH
Provider	Ashtabula BH

10. Click within the **Insurer** field, then select the appropriate Board Insurer from the dropdown list (This will be the Board financially responsible for the client). (Only the Board which you are affiliated with will appear as an option.)

Details

Event	Enrollment Form Event
Date	07/01/2024 <input type="button" value="Calendar"/> Time 12:00 AM
Staff	Test, Board1
Status	In Progress
Insurer	Ashtabula BH
Provider	Default Default Provider

11. Begin typing the name of the associated agency within the **Provider** field, then select the agency from the dropdown list that populates.



12. Click the **Save** button.

Enrollment Form Event

Effective 07/01/2024



Event **Note**

13. Navigate to the **Note** tab within the Enrollment Form Event. This will open the Client, Verification, Finances, and Attachments sub-tabs. (You will land within the Client sub-tab by default.)

Event Note

Client Verifications Attachments

Provider Information

*Submitting Provider: Default Provider (2007952)

Requested Date: 07/01/2024

Note: Required fields will be marked with an asterisk (*).

14. **Submitting Provider: Required.** Within the Provider Information section of the Client sub-tab, click within the **Submitting Provider** field and select the associated agency from the dropdown list that populates.

Client Information

Organization Name: [REDACTED]

EIN*: 999999999

*DOB: 07/01/2000 (Age: 22 Years)

*Gender: Client Refused/D

*Ethnicity: Client Refused/Doesn't Know

*Race: Client Refused/Doesn't Know

White
Asian
American Indian or Alaskan Native
Native Hawaiian or Other Pacific Islander
Black or African American

*Primary Language: English

Marital Status: Client Refused/Doesn't Know

15. **Organization Name: Required.** Enter the client's desired name. This field will be autopopulated with the value entered on the <Client Search> screen.

16. **EIN: Required.** Enter "99-9999999" as the client's EIN. This field will be autopopulated with the value entered in the <Client Search> screen.

17. **DOB:** **Required.** Enter “07/01/2000” as the client’s DOB. This field will be autopopulated with the value entered in the < **Client Search** > screen.

18. **Gender:** **Required.** Select the option **Client Refused/Doesn’t Know** from the dropdown list. This is used as the default gender (biological sex) for all organization clients.

19. **Ethnicity:** **Required.** Select the option **Client Refused/Doesn’t Know** from the dropdown list. This is used as the default ethnicity for all organization clients.

20. **Race:** **Required.** Select the option **Client Refused/Doesn’t Know**. This is used as the default race for all organization clients.

21. **Primary Language:** **Required.** Select the option **English** from the dropdown list. This is used as the default primary language for all organization clients.

Residency and Contact Information

*Address 1	Address 2	
*City	*State	Ohio
Primary Phone No.	Secondary Phone No.	*County of Residence
Client is Homeless		*County of Financial Responsibility
<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/A		Search here

22. **Address 1:** **Required.** Enter the physical address of the Board office creating the organization client.

23. **Address 2:** Enter the second line of the Board office creating the organization client (e.g., a lot or suite number when applicable).

24. **City:** **Required.** Enter the city of the Board creating the organization client.

25. **State:** **Required.** Select the state of the Board creating the organization client. This field is defaulted to Ohio.

26. **ZIP:** **Required.** Enter the ZIP code of the Board creating the organization client.

27. **County of Residence:** **Required.** Enter the county of the Board creating the organization client.

28. **County of Financial Responsibility:** **Required.** Enter the county of the Board creating the organization client.

29. **Primary Phone No.:** Enter the primary phone number of the Board creating the organization client.

30. **Secondary Phone No.:** Enter the secondary phone number of the Board creating the organization client.

31. **Client is Homeless:** Select the option N/A (This option is selected by default).

Household Information

*Household Size	<input type="text"/>	*Adjusted Gross Monthly Income \$	<input type="text"/>
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32. **Household Size:** **Required.** Enter a value “1.”

33. **Adjusted Gross Monthly Income:** **Required.** Enter a value “0.”

Enrollment Form Event

Effective	07/01/2024	<input type="button" value="Calendar"/>	Status
Event	Note		
Client	<input type="button" value="Finance"/>	Verifications	Attachments

34. Navigate to the **Finance** sub-tab.

Coverage Information

Plan	Insured ID	Group ID	Comment	<input type="button" value="Add"/>
------	------------	----------	---------	------------------------------------

35. Click on **Add**.

Coverage Information

Plan	Insured ID	Group ID	Comment	<input type="button" value="Add"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

36. **Plan:** **Required.** Select the coverage plan of the Board creating the organization client. Only one Board plan should ever be visible at a time under **Coverage Information**.

Financial Information

*Member Copay	<input type="text" value="0"/>	Medicaid Managed Care Plan
---------------	--------------------------------	----------------------------

37. Member Copay: Enter a value of “0.”

Effective 07/01/2024 Status In Progress Author Test, Board1

Event Note

Client Finance **Verifications** Attachments

Verifications

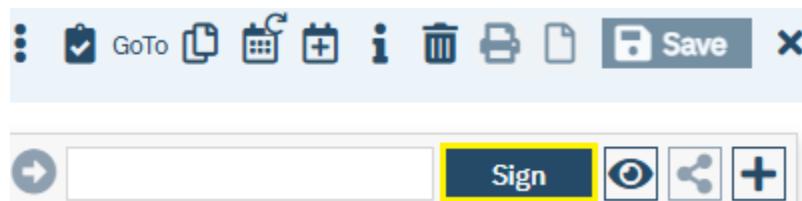
Form	Forms Given to Client or Guardian	
*Disclosure of enrollment?	<input type="radio"/> Yes	<input type="radio"/> No
*All applicable authorizations for billing as required by Federal and State laws have been received?	<input type="radio"/> Yes	<input type="radio"/> No
*In crisis at enrollment?	<input type="radio"/> Yes	<input type="radio"/> No
Client is potentially SPMI/SED	<input type="radio"/> Yes	<input type="radio"/> No
Residency verification form signed?	<input type="radio"/> Yes	<input type="radio"/> No
Proof of household income?	<input type="radio"/> Yes	<input type="radio"/> No
Proof of identity?	<input type="radio"/> Yes	<input type="radio"/> No

[Add Form](#)

38. Navigate to the Verifications sub-tab. Select Not Applicable for all listed forms.



39. Click the Save button.



40. Finally, click the Sign button. The enrollment is now completed.

g.) Enrollment Contacts

The following table lists all primary enrollment contacts at every PartnerSolutions Board.

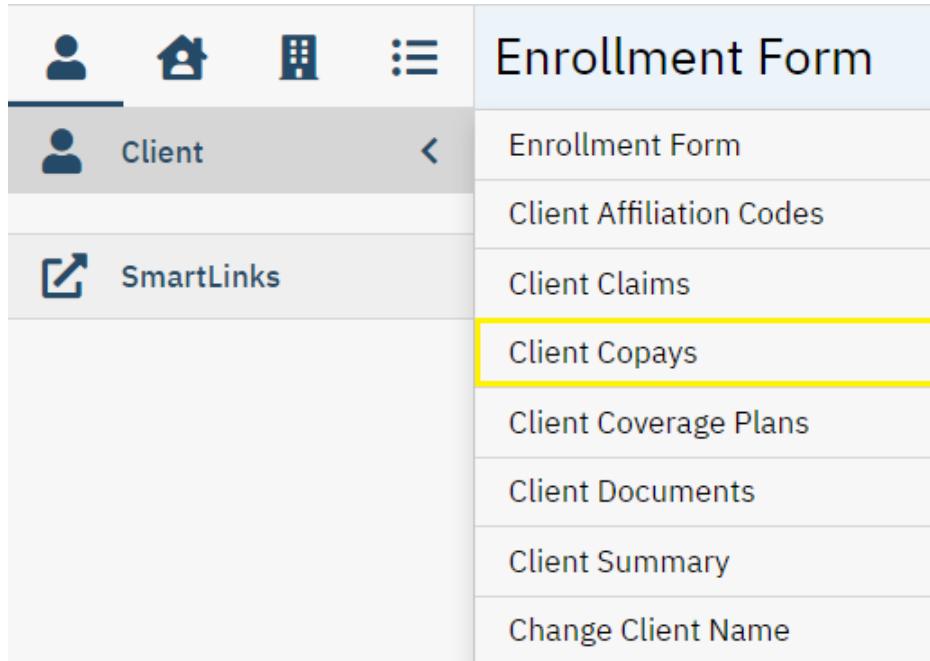
Board(s)	Name	Phone No(s.)	Fax No.	Email Address
Ashland	Patty Walton	(419) 281-3139 ext. 1228	(419) 281-4988	pwalton@ashlandmhrb.org
Ashtabula, Delaware-Morrow, Hancock, Mahoning, Mercer- Van Wert- Paulding, Muskingum Area, Portage, Putnam, Stark, Trumbull, Union, Warren- Clinton, Wayne- Holmes	Cindy Hamrick Kelli Whitted	(330) 430-3966 (330) 430-3993	(330) 454-2484	cindy.hamrick@starkmhar.org kelli.whitted@starkmhar.org
Belmont-Harrison- Monroe	Lisa Jones Rachel Scott Wendy McKivitz	(740) 695-9998	(740) 695-1607	lisaj@bhmboard.org rachels@bhmboard.org wendym@bhmboard.org
Columbiana	Shirley Carter	(330) 424-0195	(330) 424-8033	scarter@ccmhrsb.org
Jefferson	Daniel Obertance Marianne Madzia	(740) 282-1300	(740) 282-6353	obertanced@jcprb.org madziam@jcprb.org
Mahoning	Alicia Saulsberry	(330) 746-2959 ext. 7662	(330) 746-1052	saulsberry.alicia@mahoningcoountyoh.gov

h.) Enrollment Reminders

- An enrollment staff person should never sign or modify an enrollment for a client when the client is enrolled in a Board coverage plan outside of their scope of responsibilities.
- Contact PartnerSolutions directly if a suspected duplicate client is found in the system.
- Contact PartnerSolutions directly if a client appears to be enrolled in a Medicaid coverage plan (such as through the Ohio Department of Mental Health and Addiction Services iPortal) but does not appear to be enrolled in a Medicaid plan in SmartCareMCO.

IX. Viewing Client Information

a.) Client Copays

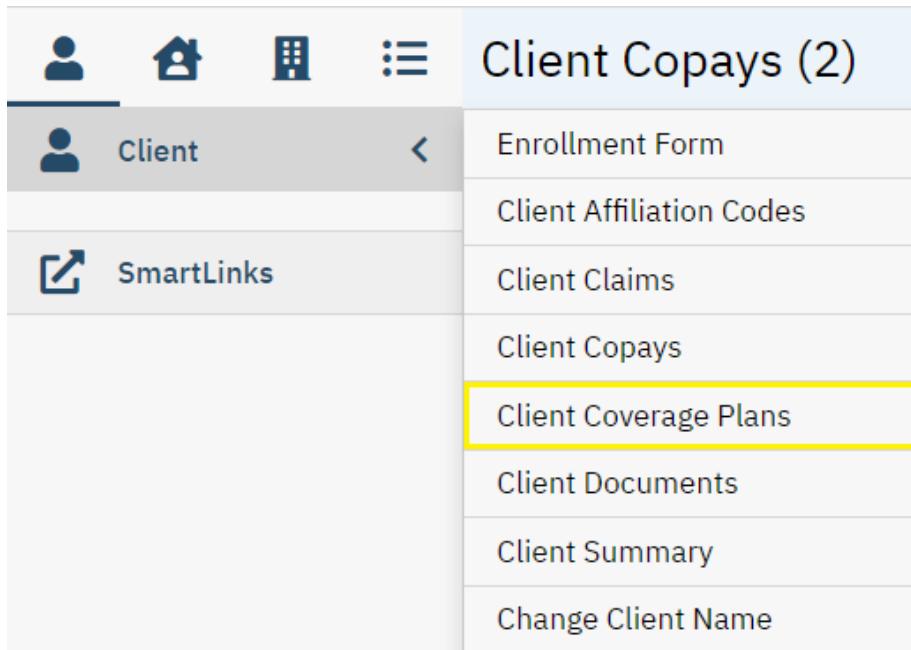


1. While in the **Client** menu (i.e., the desired client is opened), click on **Client Copays**.

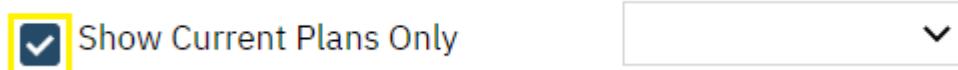
Template Id	Begin Date	End Date	% of Standard Rate	Amount
	07/01/2022		0.00%	\$0.00 Per Session
	01/01/2018	06/30/2022	50.00%	\$0.00 Per Session

2. The client's complete copay history, including start and end dates, will be visible.

b.) Client Coverage Plans



1. While in the **Client** menu (i.e., the desired client is opened), click on **Client Coverage Plans**.



2. Uncheck **Show Current Plans Only**.

The screenshot shows the 'Client Coverage Plans' page with the 'Show Current Plans Only' checkbox unchecked. The 'Plan Time Spans' section is highlighted with a yellow box and contains three entries:

- 01/01/2023 - No End Date**
 - Stark BH
- 07/01/2022 - 12/31/2022**
 - Medicaid
 - Stark BH
- 01/01/2018 - 06/30/2022**
 - Medicaid
 - Portage BH

Each entry has a 'Change COB Order...' button, an address, and a 'Set End Date' button. The 'Set End Date' buttons for the Medicaid entries are highlighted with a yellow box.

3. The client's complete coverage plan history, including start and end dates, will be visible under **Plan Time Spans**.

X. Viewing Claims

a.) Claim Statuses

The following table details the seven different claim statuses that a claim may have in SmartCareMCO. A claim may only ever have one status at a time.

Claim Status	Explanation
Entry Complete	Claim is in a pre-adjudicated state and will be adjudicated during the automated adjudication process that occurs every weeknight.
Approved	Claim will be paid at the charged amount during the automated check creation process that occurs every weekend.
Partially Approved	Claim will be paid at less than the charged amount during the automated check creation process that occurs every weekend. This may be due to a client's copay or differences between the charged amount and the contracted rate.
Pended	Claim will be in a held state until it is approved, partially approved, or denied by a Board staff person.
Denied	Claim will not be paid.
Paid	Claim has gone through the automated check creation process and will appear on an 835 file. A Paid status in SmartCare does not indicate that payment has been issued by the Board. Payment occurs outside of the system. <u>Insuring Boards should be contacted for payment inquiries.</u>
Void	Claim has been terminated. Voided claims cannot be reverted.

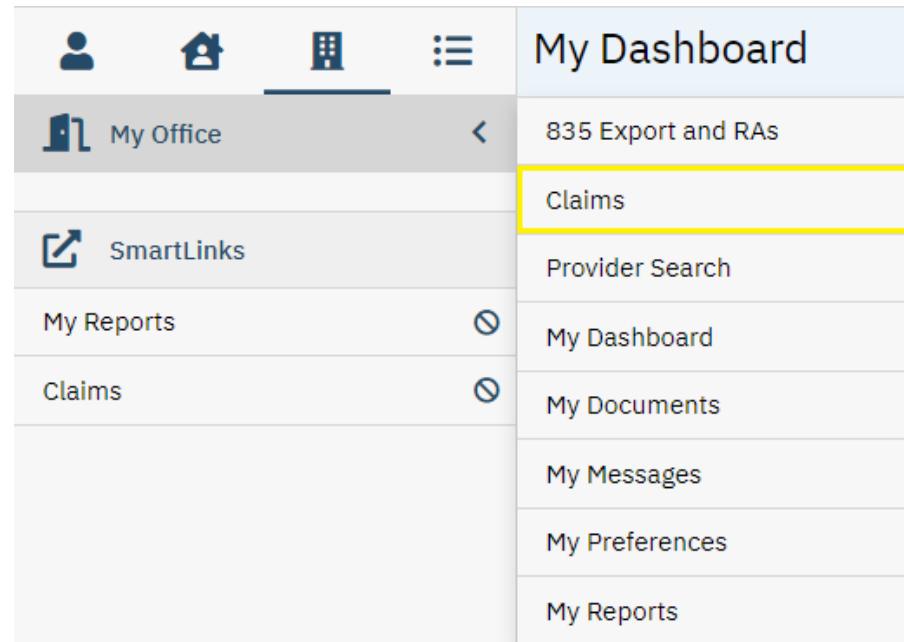
b.) Denial and Adjustment Reasons

The following table details the most common denial and adjustment reason codes that a claim may have in SmartCareMCO. A claim may have multiple reason codes at one time. You may also download the *Troubleshooting Claims in SmartCareMCO* document which outlines the causes for a number of the most common denial reasons from <https://starkmhar.org/partner-solutions/smartcareresources/>.

Reason Code	Explanation
Add-On Code: corresponding base claim line has not been approved	The billing code on the claim is an add-on code, but the claim for its corresponding base code was denied.
Add-On Code: no corresponding base claim line found	The billing code on the claim is an add-on code, but it was not billed on the same claim as a corresponding base code.
‘Billing Code rate in contract is less than claimed amount	The claim’s approved amount was adjusted because the amount billed is higher than the contract rate for that service. This adjustment reason also may indicate that the client has a copay. If so, an accompanying Member copay adjustment reason will be specified.
Billing code requires Authorization but one does not exist	The billing code on the claim requires a prior authorization for that service.
Billing code requires end date to equal start date on a claim line	The claim was billed listing a different start and end date rather than one date of service.
Claim line submitted with partial units	The claim was billed using partial units rather than a whole number.
Claim was received after the period mentioned in the Contract	The claim was billed for a date of service within a terminated contract period.
Diagnosis not entered on claim	The claim is missing an ICD-10 diagnosis code.
Invalid Billing Code	The billing code on the claim does not exist in SmartCareMCO.
Invalid date(s) of service or number of units.	The claim was billed listing either a future date or a unit amount of 0.00 units.
Invalid Diagnosis Code For Billing Code	The claim contained an invalid ICD-10 diagnosis code for the billing code on the claim.
Invalid Service For Same Member on Same Date (NCCI MUE Edits)	The claim was denied due to the National Correct Coding Initiative Medically Unlikely Edits.
Invalid Service For Same Member on Same Date (NCCI PTP Edits)	The claim was denied due to the National Correct Coding Initiative Procedure-to-Procedure Edits.
Invalid Service For Same Member on Same Date (ODM PTP Edits)	The claim was denied due to the Ohio Department of Medicaid Procedure-to-Procedure Edits.
LPN/RN as rendering provider requires ordering provider	The claim lists an LPN as the rendering provider, but an ordering provider was not listed. This rule no longer applies to claims listing an RN as the rendering provider.
Member copay	The claim’s approved amount was adjusted due to the client’s copay.
Member is not eligible for any Plan	The client on the claim was not enrolled in a coverage plan on the claim’s date of service.

Multiple Providers exceed the Billing Code Standard Allowed Units.	The unit amount billed for that claim exceeds the standard allowed unit amount for that service on that date of service.
No rate can be found for this claim line	A contracted rate does not exist for the claim as it is entered. This denial reason can mean: 1.) The agency is not contracted for that billing code, 2.) The claim was billed under the incorrect provider agency NPI type (MH/SUD), 3.) The claim is missing a required rendering provider, or the rendering provider listed is invalid, 4.) The claim is missing a required modifier, or the modifier listed is invalid, or 5.) The claim's place of service is invalid.
Pended claim was reviewed then denied	The service was pended by system or Board-appointed rules and was denied by Board staff after review.
Same claimline exists	The claim is a duplicate.
Third Party Plan is fully responsible	The claim was billed for a Medicaid-reimbursable service for a client enrolled in a Medicaid plan on the claim's date of service.

c.) Viewing Agency-wide Claims



1. While in the **My Office** menu, click on **Claims**.

The screenshot shows a filter interface for claims. It includes dropdowns for 'All Insurers', 'All Statuses', 'All Providers', 'All Sites', and an 'Apply Filter' button. Below these are dropdowns for 'All Bank Accounts', 'All Populations', 'All Billing Codes and Modifiers', 'All Billing Codes', and a 'Detail Report' button. There are also fields for 'Pended/Credit Bal Filter', 'Batch #', 'Claim ID', 'Line #', 'All Denial Reasons', 'Received From' (with a calendar icon), 'Received To' (with a calendar icon), 'DOS From' (with a calendar icon), 'DOS To' (with a calendar icon), 'Re-allocation Exception' (with a checkbox), 'Client' (with a dropdown icon), and 'Rendering Provider' (with a dropdown icon).

2. Claims may be filtered by any one or more of the following criteria:

Filter	Explanation
Insurers	View claims associated with a specific Board (e.g., Stark).
Statuses	View claims associated with a specific status (e.g., Denied).
Providers	View claims associated with a specific agency.
Sites	View claims associated with an agency's specific MH or SUD NPI. (A Provider must first be selected to utilize this field.)
Billing Codes and Modifiers	View claims with a specific billing code and modifier combination.
Billing Codes	View claims with a specific billing code, regardless of modifier(s).
Batch #	View claims with a specific batch number.
Claim ID	View claims with a specific claim ID.
Line #	View claims with a specific claim line ID.
Denial Reasons	View claims with a specific denial reason code.
Received From/To	View claims imported into the system during a specific date range.
DOS From/to	View claims with dates of services during a specific date range.
Client	View claims associated with a specific client.
Rendering Provider	View claims delivered by a specific rendering provider.

3. After selecting or entering the desired filters, click on **Apply Filter**.

Note: If more than one filter is specified at the same time, the filters are combined. For example, filtering claims for the 90832:U2 billing code and modifier combination and for claims with DOS from 01/01/18 until 01/31/18 would result in claims displaying that only meet those exact criteria.

	Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Paid Amount	Procedure	Insurer	Units	Reason	Δ
<input type="checkbox"/>	2176956	Test, Client	Coleman Profes...	03/01/2...	Paid	\$0.00	\$100.00	M3149 60	Stark BH	1.00		
<input type="checkbox"/>	2176957	Test, Client	Coleman Profes...	03/02/2...	Approved	\$19.53	\$0.00	M1620 HV	Stark BH	1.00		
<input type="checkbox"/>	2176958	Test, Client	Coleman Profes...	03/03/2...	Denied	\$0.00	\$0.00	M3140 B2	Stark BH	1.00	No rate can be f...	

4. Click on a hyperlink under **Claim Line** to view that specific claim.



5. To view a claim line's details (e.g., rendering, ordering, and supervising providers, diagnoses, etc.), click the **View Claim Form** icon.

Service Lines

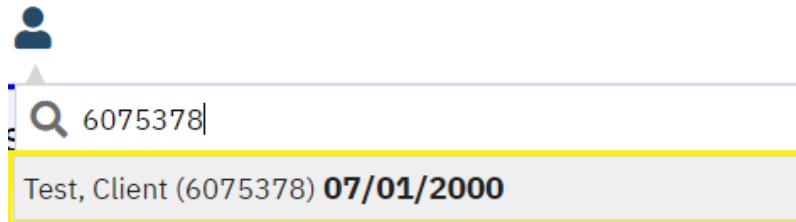
From	<input type="text"/>	<input type="button" value="Calendar"/>	To	<input type="text"/>	<input type="button" value="Calendar"/>	Code	<input type="text"/>	Modifiers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
POS	<input type="text"/>			Rendering Provider			<input type="text"/>						
Ordering Provider	<input type="text"/>			Supervising Provider	<input type="text"/>			Units	<input type="text"/>	Charge	<input type="text"/>		
NDC	<input type="text"/>			NDC Unit	<input type="text"/>			NDC Unit Type	<input type="text"/>				
Dx	<input type="text"/>	<input type="button" value="Third Party EOB Information"/>	Allowed			<input type="text"/>	Paid	<input type="text"/>	Adj	<input type="text"/>	<input type="button" value="Estimate Line billing..."/>	<input type="button" value="Insert"/>	<input type="button" value="Clear"/>
<input type="button" value="X"/>	<input type="checkbox"/>	Id	From	To	CPT Code	Units	POS	Dx	Charge	Auth			
		2176957	03/02/2023	03/02/2023	M1620 HV	1.00	11 Office	1	19.53	N			

6. Click on the radio button to the left of the claim line details you wish to view. The claim line details will populate in their respective fields under **Service Lines**.

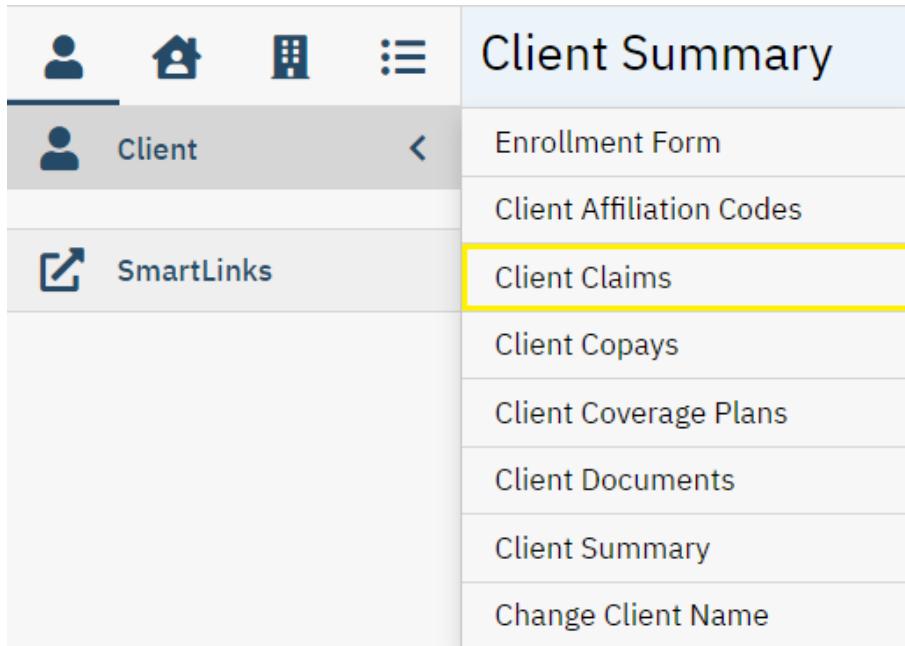
d.) Viewing Client-specific Claims



1. Click the Client Search icon, then enter the client's name (LastName, FirstName) or the client's Client UCI directly in the **Client Search** box.



1. Click on the client's name in the dropdown menu that appears if a valid match has been found.



2. Click on **Client Claims**.

Claim Line	Client Name	Provider	DOS	Status	Payable Amount	Paid Amount	Procedure	Insurer	Authorization(s)
2176956	Test, Client	Coleman Prof...	03/01/2...	Paid	\$0.00	\$100.00	M314960	Stark BH	
2176957	Test, Client	Coleman Prof...	03/02/2...	Approved	\$19.53	\$0.00	M1620HV	Stark BH	
2176958	Test, Client	Coleman Prof...	03/03/2...	Denied	\$0.00	\$0.00	M3140B2	Stark BH	

3. Click on a hyperlink under **Claim Line** to view that specific claim.



4. To view a claim line's details (e.g., rendering, ordering, and supervising providers, diagnoses, etc.), click on the **View Claim Form** icon.

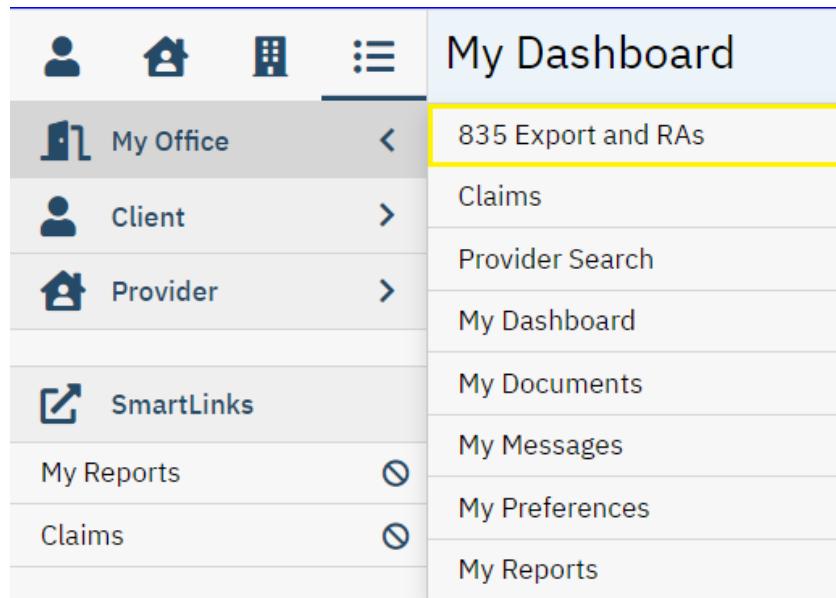
Service Lines

From	Code	Modifiers							
POS	Rendering Provider								
Ordering Provider	Supervising Provider	Units	Charge						
NDC	NDC Unit	NDC Unit Type							
Dx	Third Party EOB Information	Allowed	Paid	Adj					
<input type="button" value="Estimate Line billing..."/> <input type="button" value="Insert"/> <input type="button" value="Clear"/>									
	Id	From	To	CPT Code	Units	POS	Dx	Charge	Auth
X	<input checked="" type="radio"/> 2176957	03/02/2023	03/02/2023	M1620 HV	1.00	11 Office	1	19.53	N

5. Click on the radio button to the left of the claim line details you wish to view. The claim line details will populate in their respective fields under **Service Lines**.

XI. 835 Export and RAs

a.) Exporting an 835 Remittance File



1. While in the **My Office** menu, click on **835 Export and RAs**.

Select: All, All on Page, None		Check Total: \$ 0.00					
Date	Check Number	Payee	Payment Amt	Insurer	Bank Account	Check Status	
<input type="checkbox"/> 04/03/2023	1968	Test Provider Agency	\$100.00	Stark BH	Stark BH Bank	Non-Void C...	
<input type="checkbox"/> 02/25/2023	1962	Test Provider Agency	\$1,469.25	Stark BH	Stark BH Bank	Non-Void C...	
<input type="checkbox"/> 02/25/2023	1963	Test Provider Agency	\$28,290.69	Stark BH	Stark BH Bank	Non-Void C...	
<input type="checkbox"/> 02/25/2023	1964	Test Provider Agency	\$18,247.78	Stark BH	Stark BH Bank	Non-Void C...	
<input type="checkbox"/> 02/25/2023	1965	Test Provider Agency	\$13,545.22	Stark BH	Stark BH Bank	Non-Void C...	
<input type="checkbox"/> 02/25/2023	1966	Test Provider Agency	\$26,086.50	Stark BH	Stark BH Bank	Non-Void C...	

2. Click on the **Check Number** associated with the check you wish to generate an 835 file for.

Check Information

<input type="button" value="Void Checks"/>	<input type="button" value="Print Check"/>	Next Available # 1969	<input type="button" value="Export"/>	<input style="background-color: yellow; border: 1px solid black; color: black; font-weight: bold; font-size: 10pt; padding: 2px; margin-right: 5px;" type="button" value="835 File"/>	<input type="button" value="Print RA"/>	<input type="checkbox"/> Include Pended Claims on RA
						<input type="checkbox"/> Include Denied Claims on RA

3. Click on **835 File**. Your internet browser should then prompt you to download the file if one has previously been generated; if not, a pop-up will appear asking you to create the file.

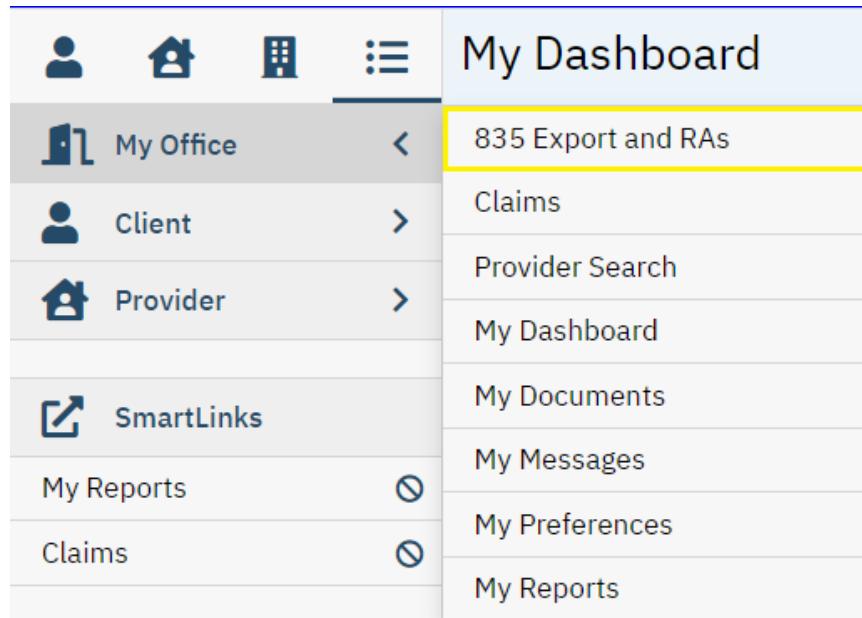
Check Details	<input style="background-color: yellow; border: 1px solid black; color: black; font-weight: bold; font-size: 10pt; padding: 2px; margin-right: 5px;" type="button" value="Process Now"/>	<input type="button" value="Generate"/>	<input type="button" value="Close"/>
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4. Click on **Process Now**.



5. Click on **Generate**. Your internet browser should then prompt you to download the file.

b.) Downloading a Remittance Advice



1. While in the **My Office** menu, click on **835 Export and RAs**.

Select: All, All on Page, None

Check Total: \$ 0.00

Date	Check Number	Payee	Payment Amt	Insurer	Bank Account	Check Status
<input type="checkbox"/> 04/03/2023	1968	Test Provider Agency	\$100.00	Stark BH	Stark BH Bank	Non-Void C...
<input type="checkbox"/> 02/25/2023	1962	Test Provider Agency	\$1,469.25	Stark BH	Stark BH Bank	Non-Void C...
<input type="checkbox"/> 02/25/2023	1963	Test Provider Agency	\$28,290.69	Stark BH	Stark BH Bank	Non-Void C...
<input type="checkbox"/> 02/25/2023	1964	Test Provider Agency	\$18,247.78	Stark BH	Stark BH Bank	Non-Void C...
<input type="checkbox"/> 02/25/2023	1965	Test Provider Agency	\$13,545.22	Stark BH	Stark BH Bank	Non-Void C...
<input type="checkbox"/> 02/25/2023	1966	Test Provider Agency	\$26,086.50	Stark BH	Stark BH Bank	Non-Void C...

2. Click on the **Check Number** associated with the check you wish to generate a remittance advice for.

Check Information

Next Available # 1969 Include Pended Claims on RA
 Include Denied Claims on RA

3. Click on the checkbox for **Include Pended Claims on RA** if you wish to include pended (i.e., held) claims on the remittance advice. Then, click on **Print RA**. A pop-up window should appear containing a remittance advice in .pdf format that may be downloaded or printed.

XII. SmartCareMCO Support

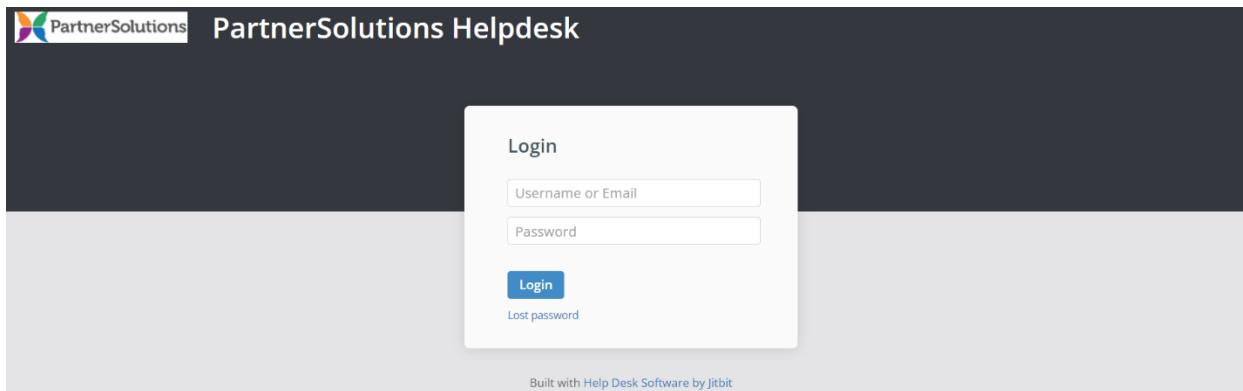
The PartnerSolutions Helpdesk system is used to communicate all support issues, questions, and requests related to SmartCareMCO. As the PartnerSolutions Helpdesk system is HIPAA-compliant, electronic protected health information, including attachments, can be submitted within the system. However, please be mindful that no electronic protected health information should ever be listed within the subject line of a submitted ticket, as that information will be included within email notifications.

a.) Logging into PartnerSolutions Helpdesk

1. Use the following link to access PartnerSolutions Helpdesk:
<https://partnersolutions.jitbit.com/helpdesk/User/Login>.

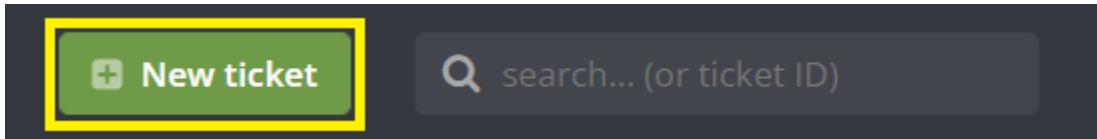
Note: All Board organizations and provider agencies are to assign a single point person or small number of point persons with access to the PartnerSolutions Helpdesk system on behalf of their respective organization.

Staff who require access to the system should complete and submit a Helpdesk Ticket Account Request form, which can be downloaded from the SmartCareMCO Resources website at <https://starkmhar.org/partner-solutions/smartcareresources/>. Completed forms should be emailed to SmartCareSupport@starkmhar.org.

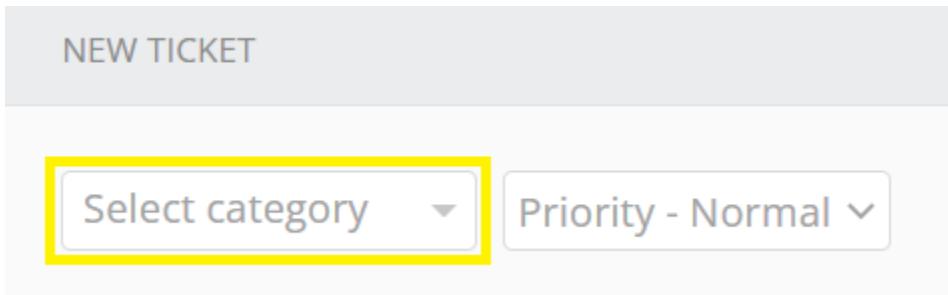


2. Enter the email address or username and password associated with your PartnerSolutions Helpdesk account in the **Username or Email** and **Password** fields, then click **Login**.

b.) Opening a New Ticket



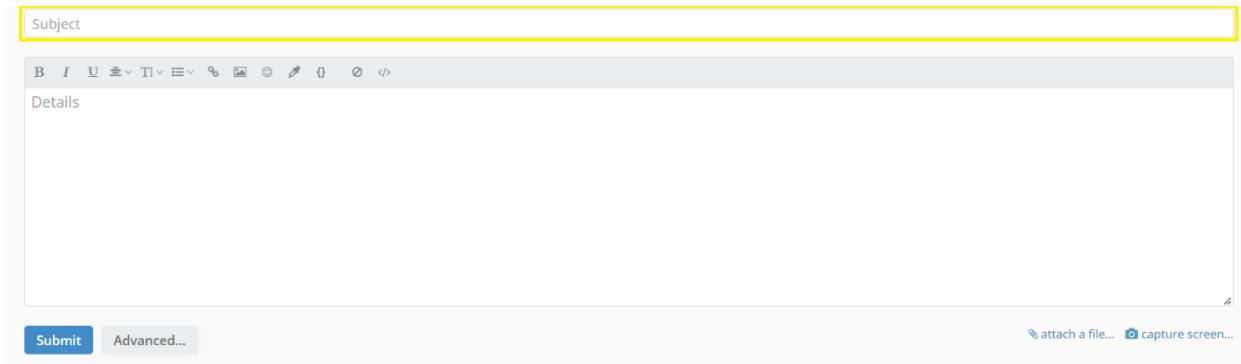
1. Click on **New Ticket**.



2. Click on **Select Category**, then select the appropriate topic for your ticket from the following list:
 - **SMARTCAREMCO / Password Reset** – Select if you or another staff person needs assistance resetting a SmartCareMCO and/or PartnerSolutions Report Portal (Formerly Heartland East Website) account password. Be sure to indicate for which account(s) a password reset is needed.
 - **SMARTCAREMCO / 835 Export and RAs** – Select if you or another staff person has any issues or questions related to remittance files and/or remittance advices.
 - **SMARTCAREMCO / 837 Import/Batch Claim Uploads** – Select if you or another staff person has any issues or questions related to 837 and/or batch claim files.
 - **SMARTCAREMCO / Board User Accounts** – Select if you have any issues, requests, or questions related to the status of Board user accounts.
 - **SMARTCAREMCO / BUSINESS RULE Changes** – Select if you have any issues, requests, or questions related to the status of your Board's setup and rules in the system.
 - **SMARTCAREMCO / Claim Corrections** – Select if you or another staff person has any issues, requests, or questions related to the claims correction process, or if a claims correction form has been submitted via the PartnerSolutions Report Portal (Formerly Heartland East Website) to be processed by PartnerSolutions.

- **SMARTCAREMCO / Claims** – Select if you or another staff person has any issues or questions related to the status of adjudicated claims. Be sure to include the Claim Line ID's of any claims being inquired about where possible.
- **SMARTCAREMCO / Enrollments** – Select if you or another staff person has any issues or questions related to the client enrollment process, or if an enrollment form has been submitted via the PartnerSolutions Report Portal (Formerly Heartland East Website) to be processed by PartnerSolutions.
- **SMARTCAREMCO / General** – Select if you or another staff person has any bugs, errors, issues, or questions related to the general use of SmartCareMCO.
- **SMARTCAREMCO / Provider Agency Setup** – **This topic should only be used by provider staff members.**
- **SMARTCAREMCO / Provider User Accounts** – **This topic should only be used by provider staff members.**
- **SMARTCAREMCO / Rate Change Requests** – Select if you have any requests related to rate changes or contract modifications.
- **SMARTCAREMCO / Reports** – Select if you or another staff person has any issues, requests, or questions related to reports generated by PartnerSolutions.

Note: Please only select help topics within the category **SmartCareMCO** in regard to submitting tickets related to SmartCareMCO, as the PartnerSolutions Helpdesk system is also utilized by NextGen. This ensures that issues are routed to the correct team.



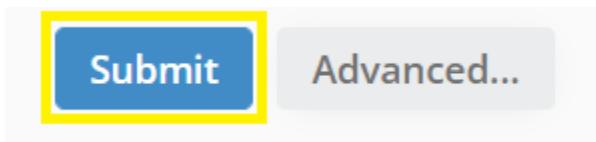
The image shows a screenshot of a ticket submission form. At the top, there is a yellow-bordered 'Subject' input field. Below it is a toolbar with various text formatting icons (B, I, U, T1, T2, %, etc.). The main body of the form is a large text area labeled 'Details'. At the bottom, there are two buttons: a blue 'Submit' button and a grey 'Advanced...' button. To the right of the 'Submit' button are links for 'attach a file...' and 'capture screen...'.

3. Enter the subject or a brief description related to your ticket in the **Subject** field. Please be mindful that no electronic protected health information (PHI) should ever be listed within the subject line of a submitted ticket, as that information will be included within email notifications. (PHI includes items such as client UCI, name, SSN, DOB, etc.)

4. Enter all of the appropriate details and relevant information related to your ticket in the **Details** field.



5. To include any attachments with your ticket, click on **attach a file...**, select the attachment you wish to upload, and then click **Open**.



6. Click **Submit**. Your ticket has now been submitted and will be responded to by a PartnerSolutions staff member.

c.) Viewing and Responding to an Opened Ticket

The screenshot shows a ticket list with the following details for a single ticket:

- SUBJECT:** Password Reset TEST
- PRIORITY:** Normal
- STATUS:** In progress
- DATE:** 3 min ago
- TECH:** Dara Covant
- UPDATED:** 1 min ago (dara.covant@star...)
- SERVER NUMBER:** #47371483
- USER EMAIL:** dara.covant@star...
- USER NAME:** Dara Covant

1. All open tickets will be automatically viewable upon logging in. Click the ticket you wish to open. Any replies by PartnerSolutions will be visible when opening a ticket. The most recent reply will be listed first.

The screenshot shows an opened ticket with the following content:

Close ticket More...

Password Reset TEST

Hi,

I need my SmartCare password reset.

Thanks!
Dara

Reply...

2. To post a reply to an opened ticket, click **Reply....** This will open a reply box.

The screenshot shows a reply box with the following interface:

- To:** Dara Covant (checked)
- Reply (ctrl + enter)**
- attach a file...**
- capture screen...**

3. Enter your reply in the above text field. If any additional attachments are needed, click **attach a file...**, select the attachment you wish to upload, and then click **Open**. Then, click on **Reply**. Your ticket has now been updated and will be responded to by a PartnerSolutions staff member, as necessary.