

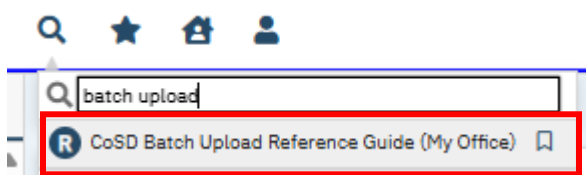
Batch Service Upload by Program

Before proceeding with the steps in this guide, programs must submit an ARF to MIS.

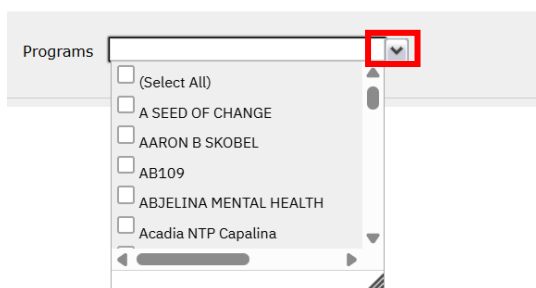
Step 1: Download SmartCare Reference Guide Report

This step provides all SmartCare-specific IDs and global codes your program must use when mapping data to the CalMHSA Batch Service Upload Template. These codes include ClinicianId, ProcedureId, and other identifiers required for a successful upload.

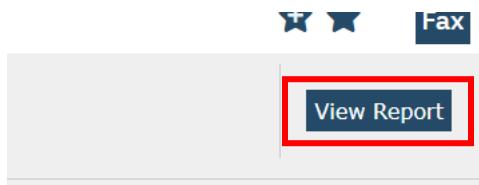
1. Run the CoSD Batch Upload Reference Guide in SmartCare by navigating to the search bar and typing in “COSD Batch Service Reference Guide”. This report includes all of your GlobalID codes specific to your program.



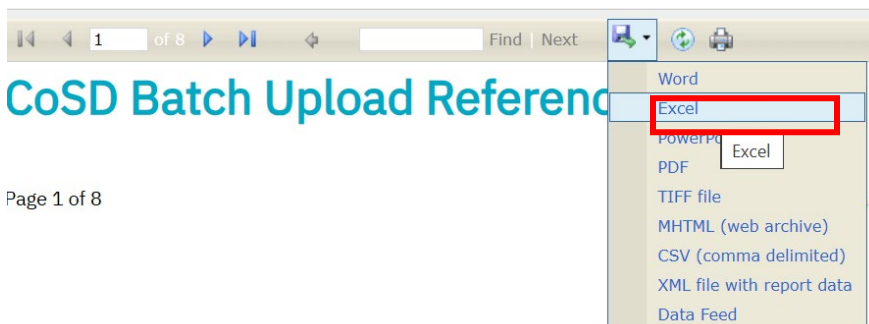
2. Select the appropriate program from dropdown menu.



3. Click “View Report”.



4. Export the results to Excel.



Step 2: Pre-Mapping Preparation from Program EHR

This step prepares your raw EHR export so it can be accurately mapped into the CalMHSA Batch Service Upload Template. Your EHR export provides the service data; the SmartCare Reference Guide provides the SmartCare IDs you need to map that data correctly.

1. Export Data from Your EHR System

- Export all required service time/days, client, staff, diagnosis, and procedure data.
- Ensure the export includes all identifiers and fields required in the SmartCare template.

2. Review the SmartCare Upload Template

- Ensure you are using the most current version.
- Review expected field names, data types, formats, and global code dependencies.

3. Compare EHR Fields to SmartCare Template Fields

Identify:

- Direct field matches
- Fields requiring transformation (formatting, code mapping)
- Missing fields that require lookup tables or manual input
- Fields requiring SmartCare global codes or IDs

4. Prepare Lookup Tables

Create reference tables for:

- SmartCare **ClientID**
- SmartCare **StaffID**
- SmartCare **LocationId** global codes

Add lookup tabs to your working file for consistency.

5. Clean and Standardize the Export Data from EHR

- Remove duplicates
- Normalize date formats
- Standardize text values (locations, staff names, diagnoses)
- Identify missing or incomplete data

6. Save a Working Copy

- Duplicate the SmartCare template
- Add your raw EHR export as a separate worksheet for cross-referencing.

Step 3: Prepare the CalMHSA Batch Service Template

This step focuses on completing the official CalMHSA Batch Service Template using the data prepared in Steps 1 and 2.

Before beginning, please review the CalMHSA guidance on completing an upload template: [CalMHSA How to Complete an Upload Template](#)

1. Download Batch service Upload template below. The template includes core globalcodeID numbers needed for mapping.

[Batch Service Upload Reference Guide](#)

2. Please note that some tabs/sheets are missing from the template. You will need to add the following:
 - ClinicalID
 - ProcedureID
 - AddOnProcedure

Then create hyperlinks to them within the template.

Instructions on how to create hyperlinks:

1. Select the cell where you want the hyperlink.
 2. Right-click → Link/Hyperlink.
 3. Choose “Place in This Document.”
 4. Select the tab you want to link to (e.g., ClinicalID).
 5. Click OK.
3. Copy all data elements related to your program (downloaded from SmartCare in the previous step) into the appropriate tabs of the Excel spreadsheet.
 4. Do **not** rename, remove, or modify any existing headers.
 5. Format the completed template so that it matches the structure demonstrated in the CalMHSA example below:

	A	B	C	D	E	F	G	H	I	J	K	L	
	ClientID	ClinicianID	ProcedureCodeID	LocationID	DateOfService	EndDateOfService	FaceToFaceTime	TravelTime	DocumentationTime	AttendingID	ReferringID	EmergencyIndicator	Evidence
1		ClinicianID	ProcedureID	Locations	MM/DD/YY 00:00 AM	N/A				N/A	N/A	EMERGENCYINDICATOR	EVIDENCEPRACTICES
2													
3													
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Step 4: Map the Batch Service Upload Spreadsheet

Perform the following tasks to populate the SmartCare Batch Service Upload Template with the correctly mapped and formatted data:

1. Map Clients to SmartCare ClientID

- Use the client lookup table prepared during pre-mapping.
- Replace source system client identifiers with the corresponding SmartCare ClientID in the upload template.
- If a client is missing from the lookup, flag and resolve before proceeding.

2. Map Staff to SmartCare StaffID

Populate the following fields using the SmartCare StaffID lookup (leave fields blank if not applicable for the service):

- ClinicianID
- AttendingID
- ReferringID

Ensure all mapped staff IDs match the exact SmartCare values, as invalid staff IDs will cause upload failures.

3. Map Service Locations to SmartCare LocationID Global Codes

- Convert all service location values from the EHR export into the corresponding LocationID global code.
- Verify that location codes reflect the correct site, program, or service unit as defined by SmartCare.

4. Format Date of Service Fields

- Convert the Date of Service and End Date of Service (if applicable) to the required SmartCare format:
M/D/YYYY 24HH:mm:ss
- Confirm consistent time-zone handling if the source system stores UTC or includes offsets.

5. Map Emergency Indicator to SmartCare Global Codes

- Translate any EHR emergency/urgent indicators into the correct SmartCare global code values.
- Leave blank if the service type does not require this indicator.

6. Map Evidence-Based Practices (EBP) to SmartCare Global Codes

- Using the provided SmartCare EBP global code list, translate any EBP fields from your source system.
- If multiple EBPs are documented, follow SmartCare rules for allowed combinations or reporting.

7. Map Transportation Services to SmartCare Global Codes

- Convert transportation-related service fields to their appropriate SmartCare global code values.
- Leave blank if transportation does not apply to the service.

8. Map Billing Diagnoses to ICD-10 Codes

- Ensure all diagnosis fields are converted to valid and billable ICD-10 codes.
- Remove any local or non-standard diagnostic labels from the EHR export.
- Validate that codes follow ICD-10 formatting conventions (e.g., decimals correctly placed).

9. Map Present on Admission (POA) Indicators to SmartCare Global Codes (Residential only)

- Translate all POA indicators into the correct global code values.
- Confirm POA entries are present where required for billing.

10. Map Procedure Codes and Add-On Procedures to SmartCare Procedure Code IDs

- Match all procedure codes from the EHR export to the SmartCare Procedure Code ID list.
- Include add-on procedures where applicable.
- Confirm that each service has a valid SmartCare Procedure Code ID before upload.

11. Verify Column Order Matches the SmartCare Upload Template

- Ensure the completed spreadsheet columns are in the exact same order and naming convention as the original SmartCare template.
- Do not add, remove, or rename columns.
- Confirm there are no blank header rows, merged cells, filters, or additional formatting.

Step 5: Combine and Join Program Export Data with Batch Service Upload Spreadsheet

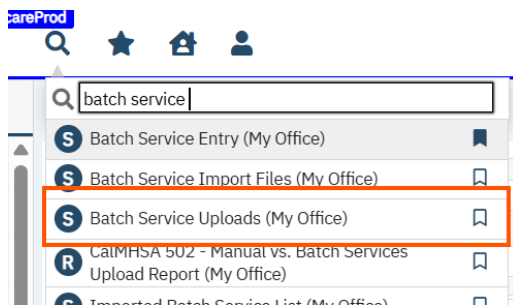
1. **Identify the key fields** that will be used to join the program export data with the Batch Service Upload spreadsheet.
2. **Clean and standardize** all join fields to ensure consistent formatting and prevent mismatches.
3. **Perform the join/merge** to combine the two datasets accurately.
4. **Review and resolve** any duplicate records or mismatched values identified during the merge.
5. **Confirm that all required fields** are populated and correctly aligned after the join.
6. **Lock or finalize the combined dataset** to prepare it for mapping and further processing.

Step 6: Upload to SmartCare

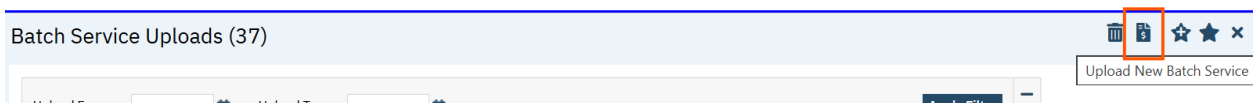
Before beginning this step, please review the CalMHSA Service Import Guide for additional instructions, screenshots, and tips to ensure a successful upload:

[Service Import Into Practice Management](#)

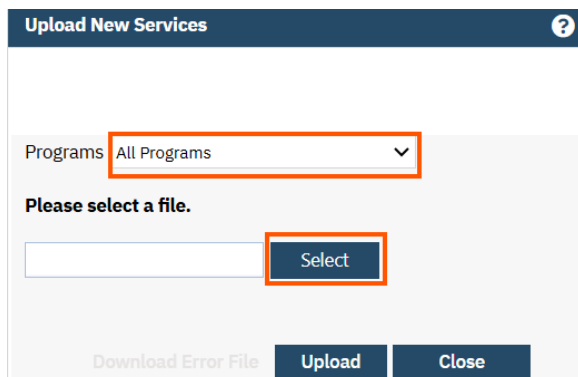
1. In SmartCare, search “Batch Service Upload (My Office)”.



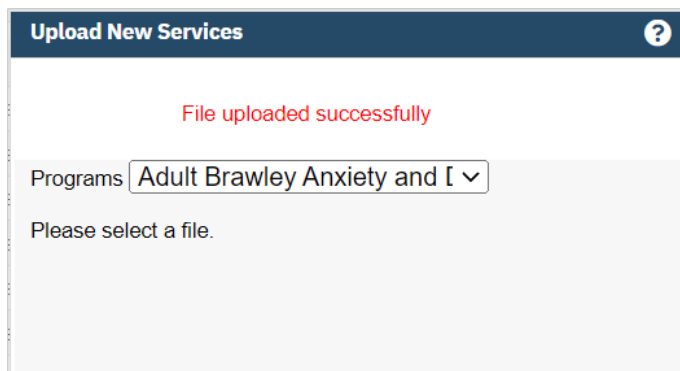
2. Click “Upload New Batch Service”.



3. Select Program, upload file, and click Upload.



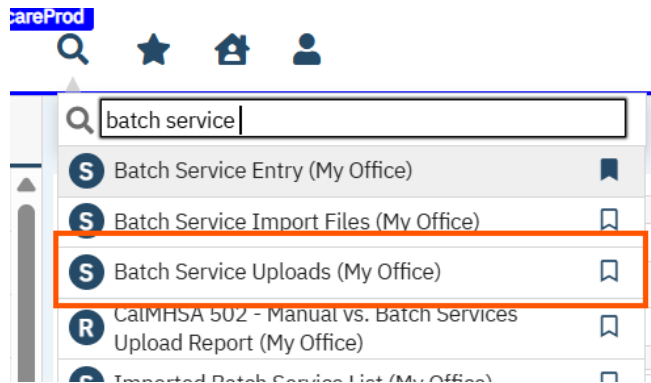
4. If your spreadsheet is filled out correctly, a validation displays letting you know that the file has been uploaded.



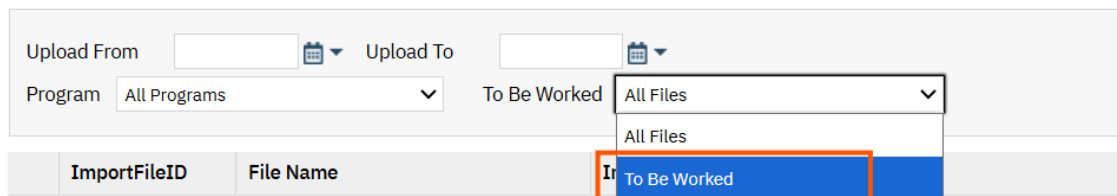
Step 7: Review & Fix Errors

Please wait at least 2 business days to ensure all errors are captured.

1. Open uploaded batch via Batch Service Upload (My Office).



2. Filter by "To be Worked" to view errors and click "Apply Filter".



3. Export, fix, remove 'Processing Error' column, and re-upload as a different file name.

Step 8: Confirm Upload

1. Navigate to Services (My Office) within SmartCare.
2. Export file previously uploaded.
3. Verify the uploaded services appear correctly.

Tips for Success

- Always use the correct SmartCare global codes and ID values.
- Double-check ClientIDs, StaffIDs, and Dates of Service for accuracy.
- Ensure all formulas in your template are correct and functioning as expected.
- Verify that an apostrophe (') is in the EBP field, as required for successful upload.
- Do not modify the template structure, header names, or column order.
- Review CalMHSA-provided documentation and links for additional guidance.