



Service Time Generator and TUOS Generator Template Training

BHS Strategy and Finance – Fiscal Team

Service Time Generator

- Utilize Program Invoicing Report from Smartcare
- Includes all services regardless on clients' plan and plan status
- Includes services that are in Complete and Show status (may include services with error)

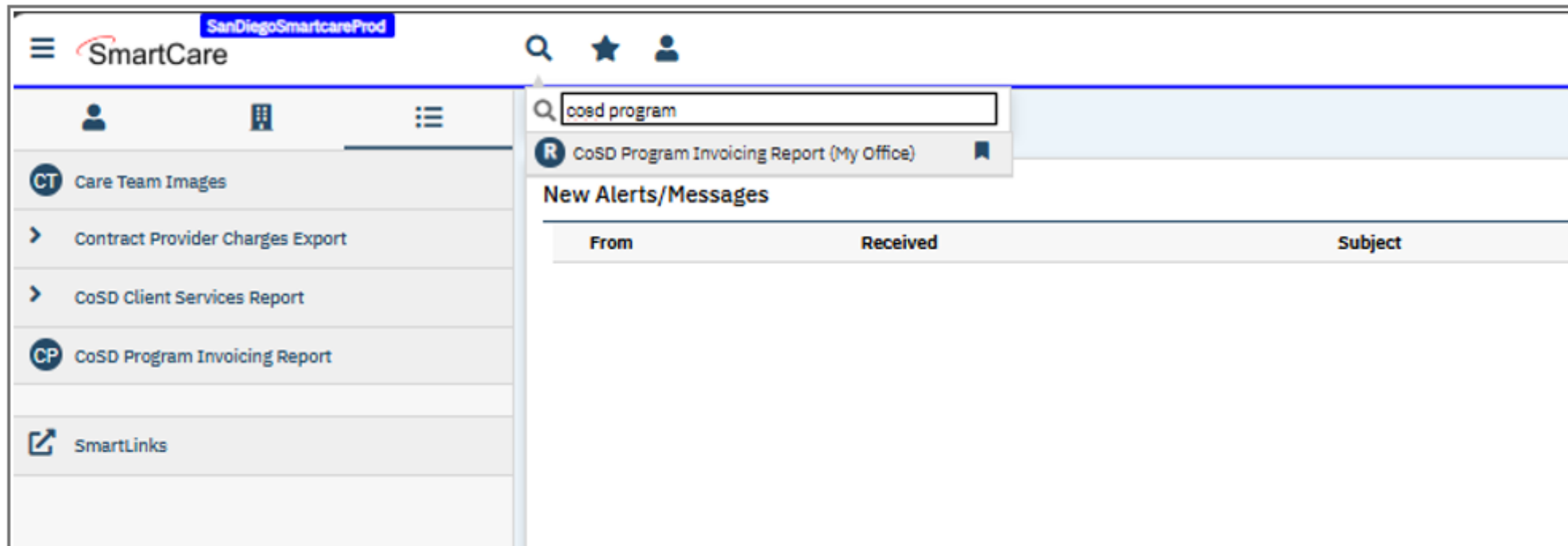
TUOS Generator

- Utilize Contract Provider Charges Export Report from Smartcare
- Includes services for clients with active plans only.
- Includes services that are already converted to charges

Generating CoSD Program Invoicing Report



- In the Smartcare home screen, use the search bar to type and select the CoSD Program Invoicing Report.



Generating CoSD Program Invoicing Report



- In the new pop-up screen, enter the “Date of Service From” and “Date of Service To”
- Select “Complete” and “Show” from the Service Status dropdown
 - For Final Reconciliation, we will ask contractors to select services in “Complete” status only.
- Select your program name(s) from the Program Code dropdown
- Click “Select All” from the Procedure Name dropdown
- Click “View Report”

Generating CoSD Program Invoicing Report



Report View - Work - Microsoft Edge

<https://sdmhsc.smartcarenet.com/SanDiegoSmartcareProd/ShowReport.aspx?ReportId=ZDdJazM67ms%3D&ReportServerId=RUNPkrIID3Q%...>

Date Of Service From 9/1/2024 Date Of Service To 7/10/2025

Service Status Complete, Show Program Code CASA DE AMPARO A/D AFTERCARE,

Procedure Name Assessment Contribution, Assessme

View Report

1 of 51 Find Next

Generating CoSD Program Invoicing Report



- Export report to CSV file.

Report View - Work - Microsoft Edge

https://sdmhc.smartcarenet.com/SanDiegoSmartcareProd/ShowReport.aspx?ReportId=ZDdJazM67ms%3D&ReportServerId=RUNPkrIID3Q%...

Date Of Service From: 9/1/2024 Date Of Service To: 7/10/2025

Service Status: Complete, Show Program Code: CASA DE AMPARO A/D AFTERCARE, Procedure Name: Assessment Contribution, Assessme

View Report

1 of 51

CoSD Program Invoicing

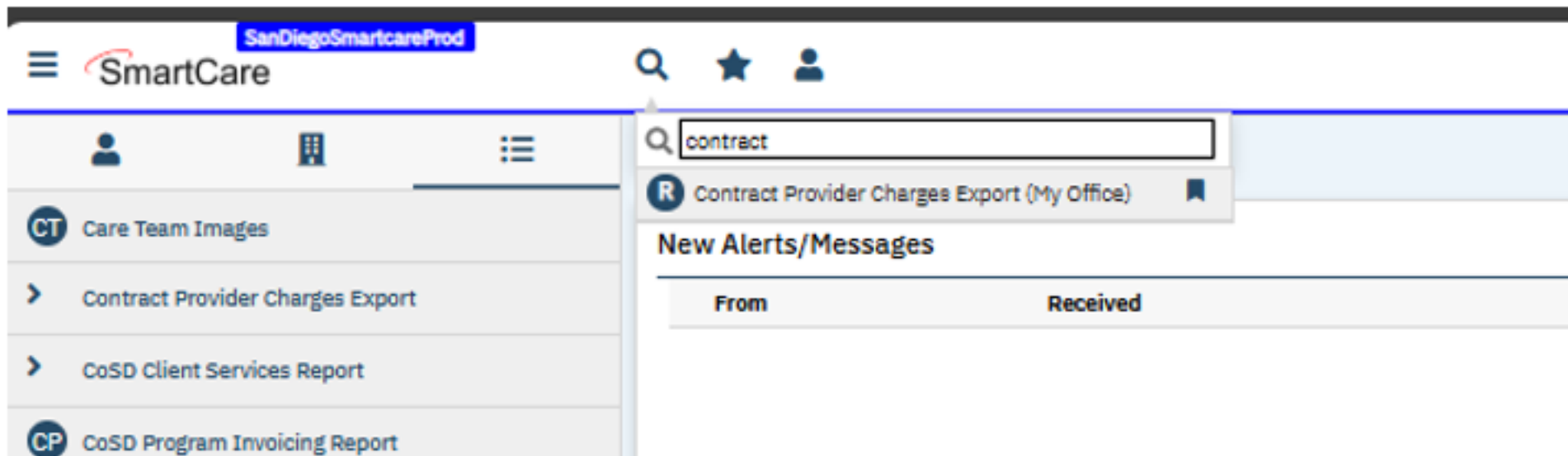
From 9/1/2024 To 7/10/2025

Service Month/Year	Service ID	Client ID	Program	Staff Name	Staff License / Degree	Billing	Procedure Name
09/2024	91972	200256035	CASA DE AMPARO	Bresnik, Marcella	APCC Associate Professional Clinical Counselor	Yes	Psychosocial Rehab - Individual
09/2024	95430	200256035	CASA DE AMPARO		APCC Associate Professional Clinical Counselor	Yes	Psychosocial Rehab - Individual

Export options: Word, Excel, PowerPoint, PDF, TIFF file, MHTML (web archive), CSV (comma delimited), XML file with report data

Generating Contract Provider Charges Export Report

- In the Smartcare home screen, use the search bar to type and select the Contract Provider Charges Export Report



Generating Contract Provider Charges Export Report



- In the new pop-up screen, select the applicable program name/s

A screenshot of a web application interface for generating a report. The browser address bar shows the URL: https://sdmhsc.smartcarenet.com/SanDiegoSmartcareProd/ShowReport.aspx?ReportId=fe4FkuxTMYU%3D&ReportServerId=RUNPkrIID3Q%3... The page has a header with a search icon, a star icon, and a "Fax" button. Below the header, there is a "Programs" dropdown menu and a "Charges Created Start" date field. A list of programs is displayed, each with a checkbox:

- ☐ ALLIANCE FOR WELLNESS INC
- ☐ Alpha Project Casa Raphael 3.1
- ☐ Alpha Project Casa Raphael 3.5
- ☐ Alpha Project Casa Raphael Standalone Svcs
- ☐ ALPINE SPECIAL TREATMENT
- ☐ ALVARADO HOSPITAL MEDICAL CNTR
- ☐ ALVARADO PKWY INST API
- ☐ ANALIA G CHAPERO
- ☐ ANDREW ALLEN MD CORPORATION
- ☐ Apex Recovery OS AWM
- ☐ API-ALVARADO PARKWAY INSTITUTE
- ☐ AURORA HOSPITAL
- ☐ BALANCED PSYCHOLOGY SERVICES APC

 To the right of the list is a "Charges Created End" date field and a "View Report" button. A "NULL" checkbox is also visible.

Generating Contract Provider Charges Export Report



- Uncheck “Null”
- Enter the “Charges Created Start” date and the “Charges Created End” date
- Select “True” for “Include County Created Procedures”
- Press “View Report”

Generating Contract Provider Charges Export Report



Report View - Work - Microsoft Edge

<https://sdmhsc.smartcarenet.com/SanDiegoSmartcareProd/ShowReport.aspx?ReportId=fe4FkuxTMYU%3D&ReportServerId=RUNPkrIID3Q%3...>

Programs: CASA DE AMPARO A/D AFTERCARE, Charges Created Start: 9/1/2024, Charges Created End: 7/10/2025, Include County Created Procedures: ☒ True ☐ False

View Report

1 of 2 ? Find Next

Generating Contract Provider Charges Export Report

- Export report to CSV file

Report View - Work - Microsoft Edge

https://sdmhsc.smartcarenet.com/SanDiegoSmartcareProd/ShowReport.aspx?ReportId=

Programs: CASA DE AMPARO A/D AFTERCARE, Charges Created Start: 9/1/2024

Charges Created End: 7/10/2025 NULL Include County Created Procedures: ☒ True ☐ False

1 of 2 ? Find Next

BatchId	ProgramId	ProgramName	ProgramNpi	StaffId	FreeName	StaffNpi
9464bc07-cc26-4331-9f63-a47d85fcb8c	1000246	CASA DE AMPARO STRTP A/D	1023141234		vered chologist	104000
9464bc07-cc26-4331-9f63-a47d85fcb8c	1000262	CASA DE AMPARO STRTP B/C	1174200000		Medical tor	100000
9464bc07-	1000246	CASA DE	1023141234			11740091

Export options menu:

- Word
- Excel
- PowerPoint
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- YML file with report data
- CSV (comma delimited)

Where to find the templates?



- The templates are in the [BHS Technical Resource Library](#) under section 1.2.2

1.2.2 Budget/Invoice Templates:

FY 24-25 BHS Budget Template - Cost Reimbursement

FY 24-25 BHS Budget Template (DMC) - Cost Reimbursement

FY 24-25 BHS MH Invoice Template - Cost Reimbursement

FY 24-25 BHS SUD Invoice Template - Cost Reimbursement

FY 23-24 MH Invoice - Fixed Price Redeterminable Template

FY 22-23 MH Invoice - Fixed Price Redeterminable with Day Svcs Template

Service Time Generator - Program Invoicing Report

Service Time Generator (CSU-NA) - Program Invoicing Report

Service Time Generator (CSU-Palomar) - Program Invoicing Report

Service Time Generator (CSU-Prime Bayview) - Program Invoicing Report

TUOS Generator

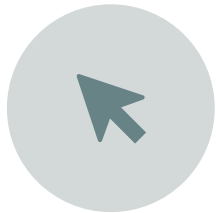
Before using the template...



Make sure that template is macro-enabled.



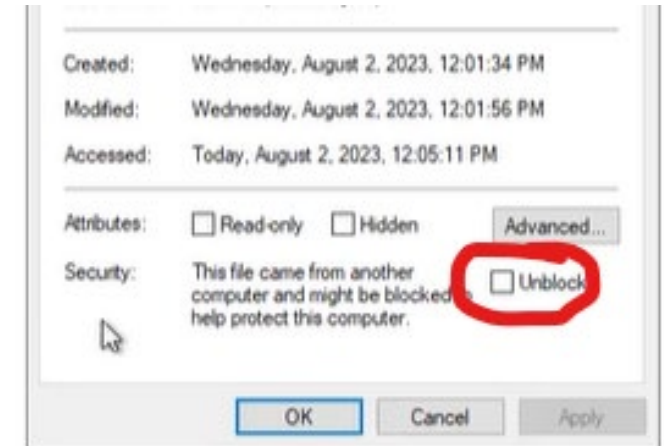
To enable the macro in the template, go to the folder where the template is saved.



Right click the file and go to Properties.



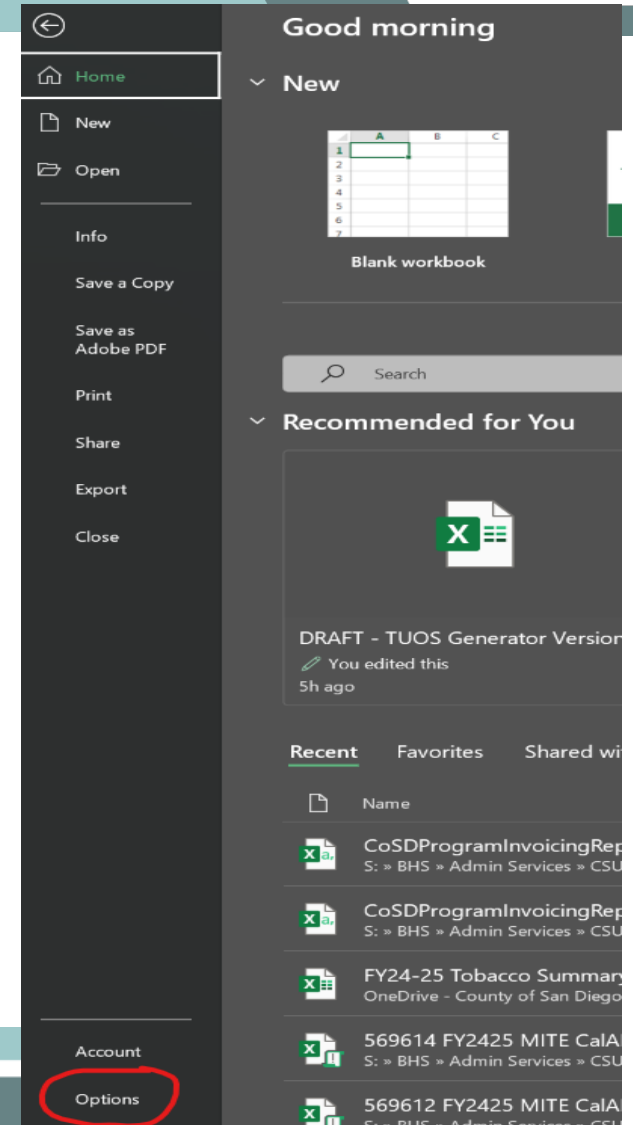
Under Security, check Unblock the click OK.



Another way to enable the Macro

1. Open Excel and access Options:

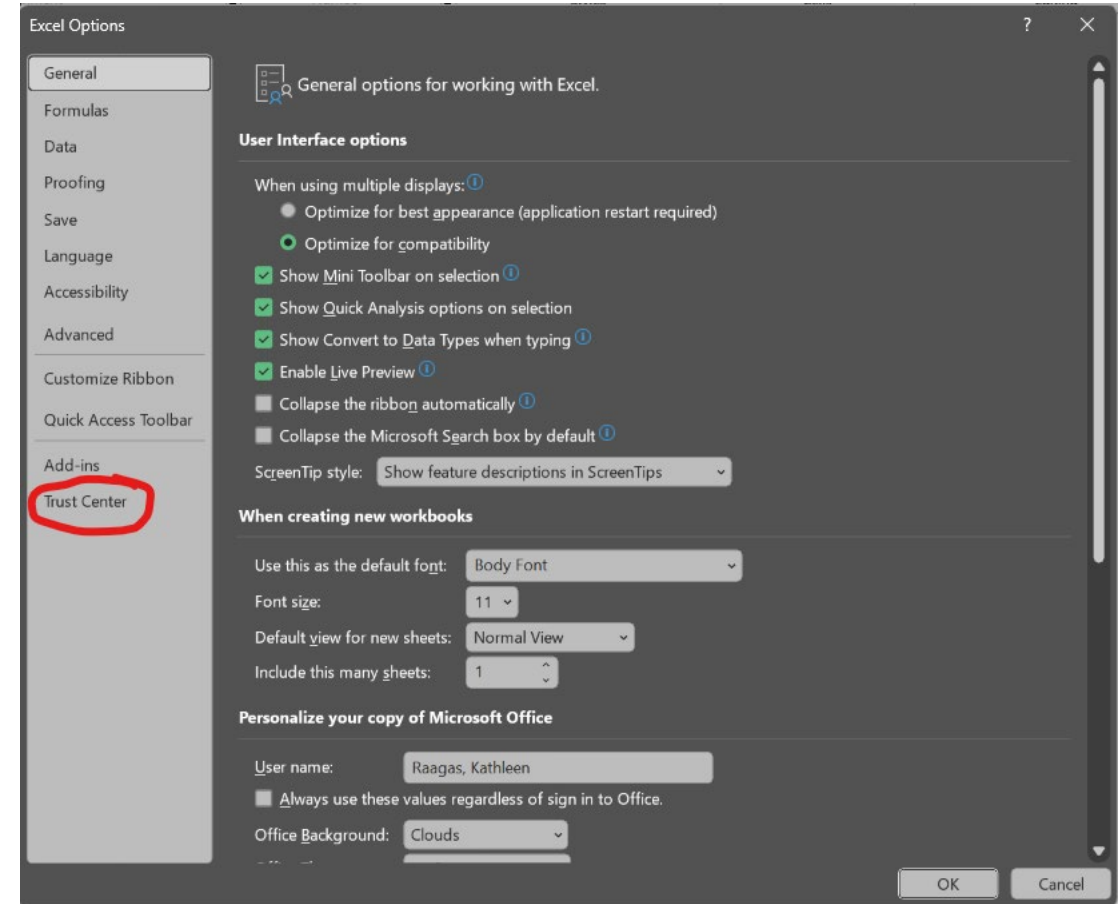
- Click on the "File" tab, then select "Options" at the bottom of the left-hand menu.



Another way to enable the Macro

2. Navigate to Trust Center:

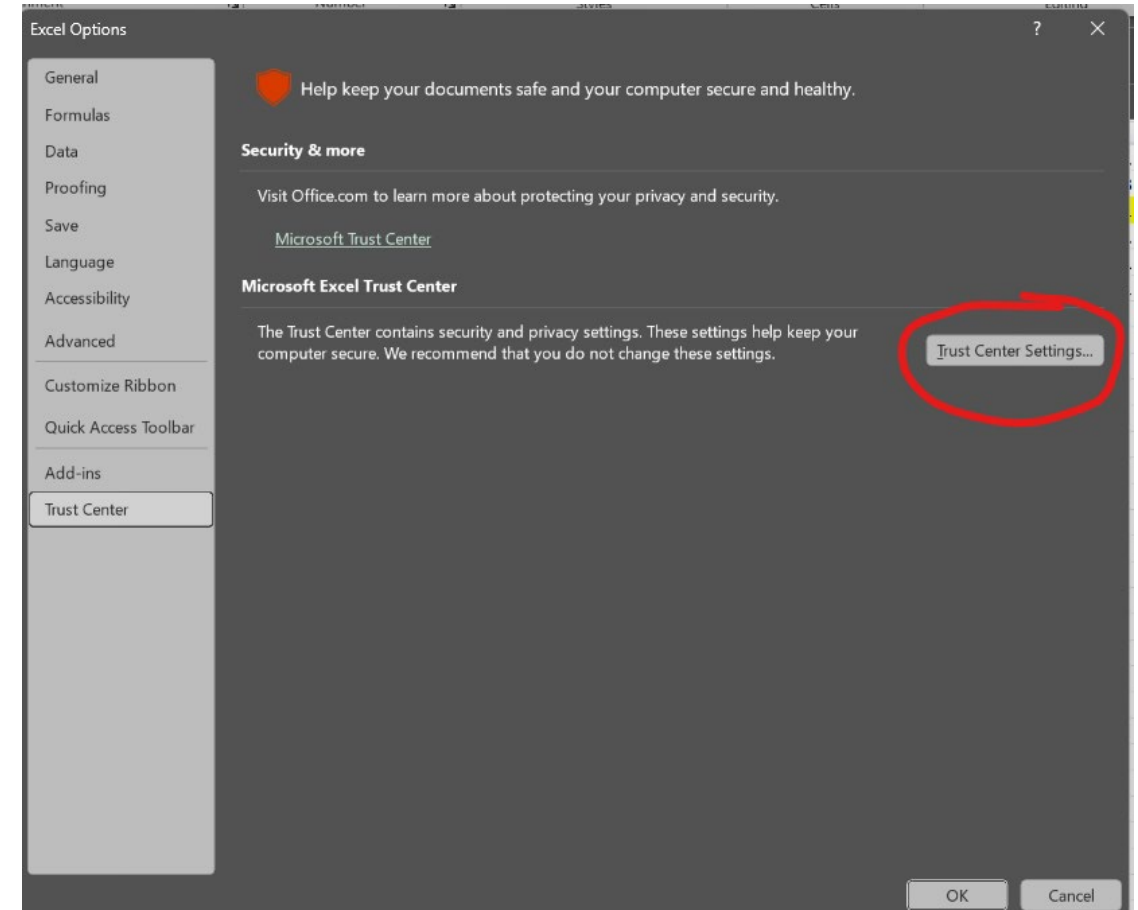
- In the Excel Options window, choose "Trust Center" from the left-hand menu.



Another way to enable the Macro

3. Open Trust Center Settings:

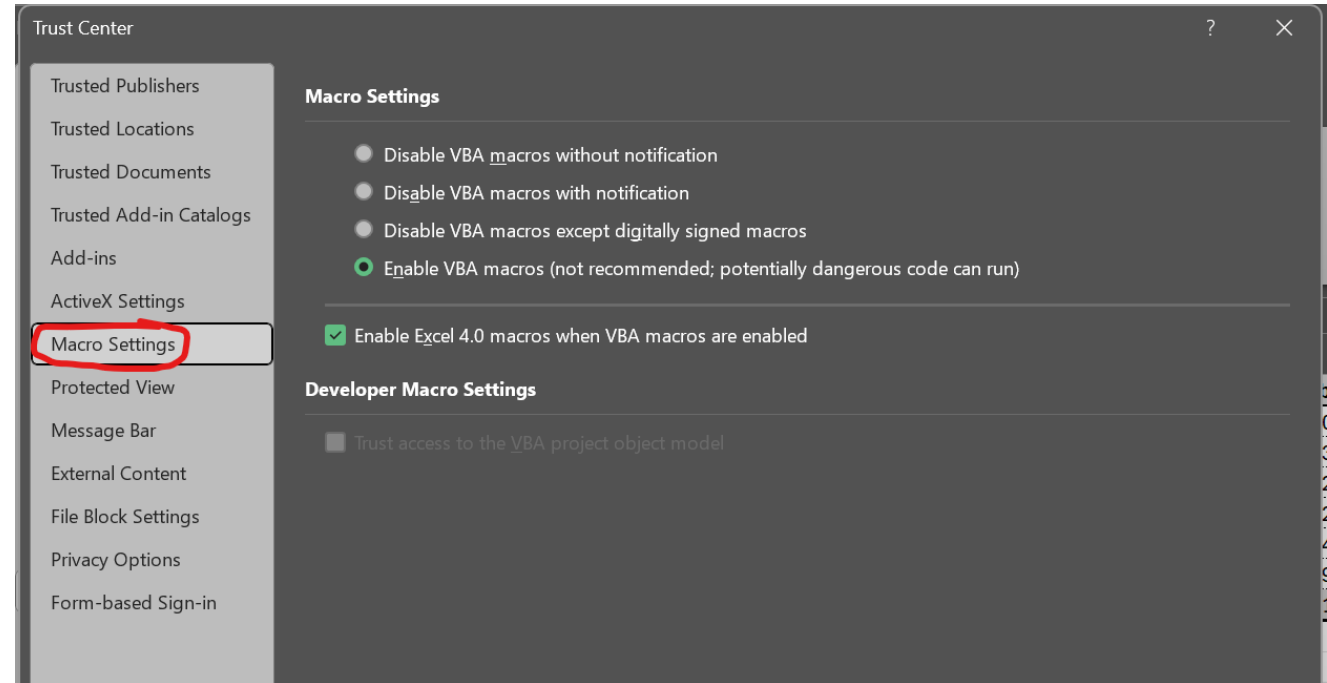
- Click on the "Trust Center Settings" button on the right-hand side.



Another way to enable the Macro

4. Go to Macro Settings:

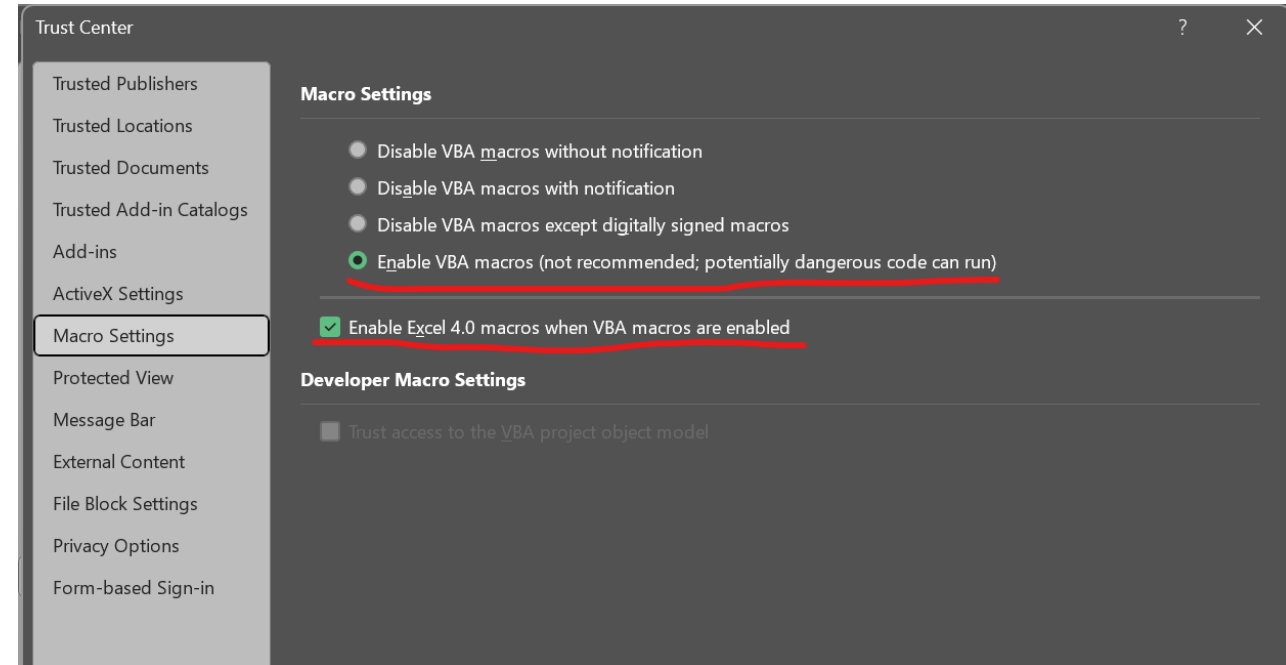
- In the Trust Center dialog box, select "Macro Settings" from the left-hand menu.



Another way to enable the Macro

5. Choose a Macro Setting:

- Enable all macros and Enable Excel 4.0 macros when VBA macros are enabled: This allows all macros to run without any restrictions. However, it's generally recommended to use this setting only when you trust the source of the workbook



6. Click OK.

Service Time Generator



- Remove non-billable services
- Converts service time to billable minutes/units
- Identify individual and group services
- Summarize data by credential

(Please refer to the Instruction tab of the template for the steps on how to use the template)

TUOS Generator



- Filter data by service date
- Convert charges to billable units/minutes
- Identify individual and group services
- Identify add-on services (e.g. Interpreter Services, Interactive Complexity)

(Please refer to the Instruction tab of the template for the steps on how to use the template)

SUD Providers



- For SUD Providers, generate both Service Time Generator and TUOS Generator. Use the SUD Units Reconciliation Template to reconcile the units of both reports.
- The SUD Units Reconciliation Template will create a summary by Plan (Funding Sources).

Fixing Missing Credential



- Submit a modified ARF (Account Request Form) to BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov and update the effective date of the ARF. The effective date on the ARF should be the date the staff was hired or able to provide/bill services.
- If error is due to inactive credential, the staff must provide the license renewal date to BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov. Once license date is verified by BHS, Smartcare will be updated with the new date and the active credential will show in the report.

Questions?



LIVE WELL
SAN DIEGO

Thank You!