



Before submitting an SMI Assessment Packet, please ensure Content, Criteria, and Contact Information are complete.

Content

- **Required Forms:** Include all required forms (Consent, Determination Form, Core Assessment). Forms must be signed (verbal consent can be used), dated, and include staff credentials.
- **Waiver & ROI:** If the client waived the three-day decision, include the signed waiver and ROIs for any additional providers, hospitals, or emergency contacts. For current substance use, please consider the **20-day timeframe and EEP option** on the waiver.
- **Face Sheet/Demographic Sheet:** Include this form in the packet and use it as a checklist for information entered into the Provider Submission Portal (PSP) during electronic submission.
- **Records:** Include **at least six months** of clinically relevant records. Include legal documents when applicable (e.g., guardianship paperwork, COT petition).

Criteria

- **Thorough Narratives:** Complete all sections of the Determination Form with **client-specific, detailed examples**—not symptom lists. Clearly describe the client's lived experience and functioning.
- **Supporting Evidence:** Clearly link the proposed diagnosis to functional impairment with concrete evidence.
- **Assessments:** Include both historical and current Core Assessments that align with symptoms and functioning described in the Determination Form.

Contact Information

- **Client Information:** Provide current client contact information (mailing and/or email address, phone number, and emergency contact) on the face sheet and ROIs.
- **Provider Contacts:** List at least **two contacts** (name, phone, email) who know the client and can staff the case with our doctor if needed.

After Submission

Ensure the packet submission contact listed in the PSP monitors and opens emails, as we may need corrections, updates, or additional documentation.

We are here to help. Please reach out with any questions or for technical assistance:

Jennifer Janzen, Eligibility Education and Training Coordinator Jennifer.Janzen@Solari-Inc.org

SMI Help Desk: EligibilityDetermination.HelpDesk@solari-inc.org or 855.832.2866