



California Mental Health Services Authority

A faint, light gray background graphic of a molecular structure, consisting of interconnected nodes and lines forming a hexagonal lattice pattern.

# Prescription Support Services Clinical Documentation Guide

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# About this User Manual

This user manual is designed to provide a how-to guide of the features and functionality of SmartCare. It will outline how to complete each workflow in a step-by-step format with related screenshots that will make understanding how to complete each workflow easy. Through this guide, you will learn about SmartCare's comprehensive suite of tools and advanced technologies to enter client data securely and efficiently.

We hope that by following these instructions you will gain a better understanding of the capabilities of SmartCare so that you can start using the system right way with confidence.

## Audience

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This manual is intended for use by anyone who will use the SmartCare EHR to provide prescription support services for county clients. This is a companion guide to the SmartCare Clinical Documentation User Manual, which covers all the basic functions for any direct-service staff. This manual contains additional information for staff who have additional functions related to medication support services.

## Computer Literacy Assumptions for Understanding this User Manual

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- Ability to perform basic word processing such as typing and searching for documents in files
- Understands data entry techniques into electronic forms and documents
- Familiarity with running a windows operating system or other popular programs like Mac OS.
- Basic knowledge of data bases and their structure
- Basic knowledge of how to use internet browsers like Microsoft Edge and Google Chrome

## IT Support Requests:

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Please call our Help Desk at:916-214-8348 or submit a live chat question to <https://2023.calmhsa.org/>

**Note:** Before beginning to use the same system, make sure you have a compatible internet browser like Microsoft Edge and Google Chrome. CalMHSA recommends Google Chrome for best user experience.

## LMS Related Support:

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Please email: [moodle@calmhsa.org](mailto:moodle@calmhsa.org)

# Rx Navigation and Prescriptions

Prescribing for Outpatient Medication Support Services is done through a SmartCare module called Rx. In this section we will describe the process of getting to SmartCare's Rx module and navigating the Rx module, creating prescriptions, adding medications, and other functionality.

Ultimately, upon completion of these workflows, you should have a comprehensive understanding about how to use SmartCare to efficiently order prescription medications while ensuring patient safety.

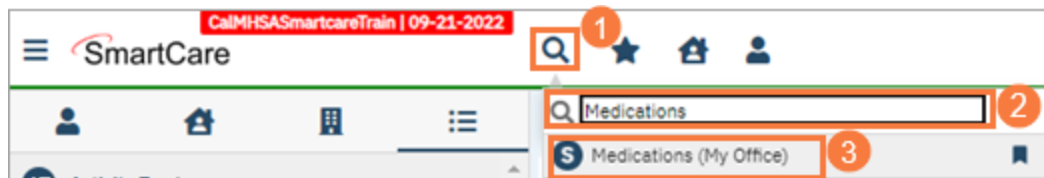
**NOTE:** When first navigating the Rx environment you will probably get a lot of popups explaining and asking various questions. Once responded to, they won't show again.

## Getting There and General Overview

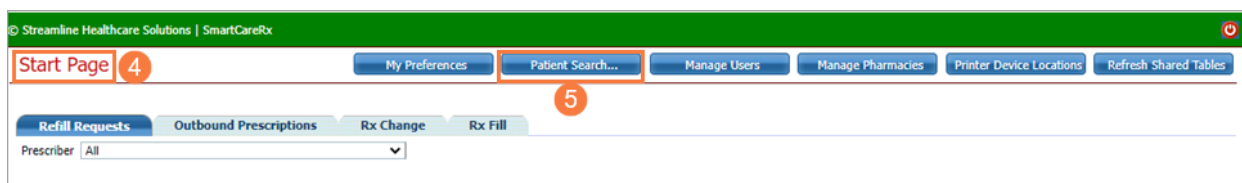
There are two ways to get to the Rx module. You can get to it from 'Search' and then doing a patient search, or you can do a 'Client Search' to get the client first and then go to 'Search' to pull up the Rx screen which will show the clients information.

### First Way: Rx Screen to Patient Search

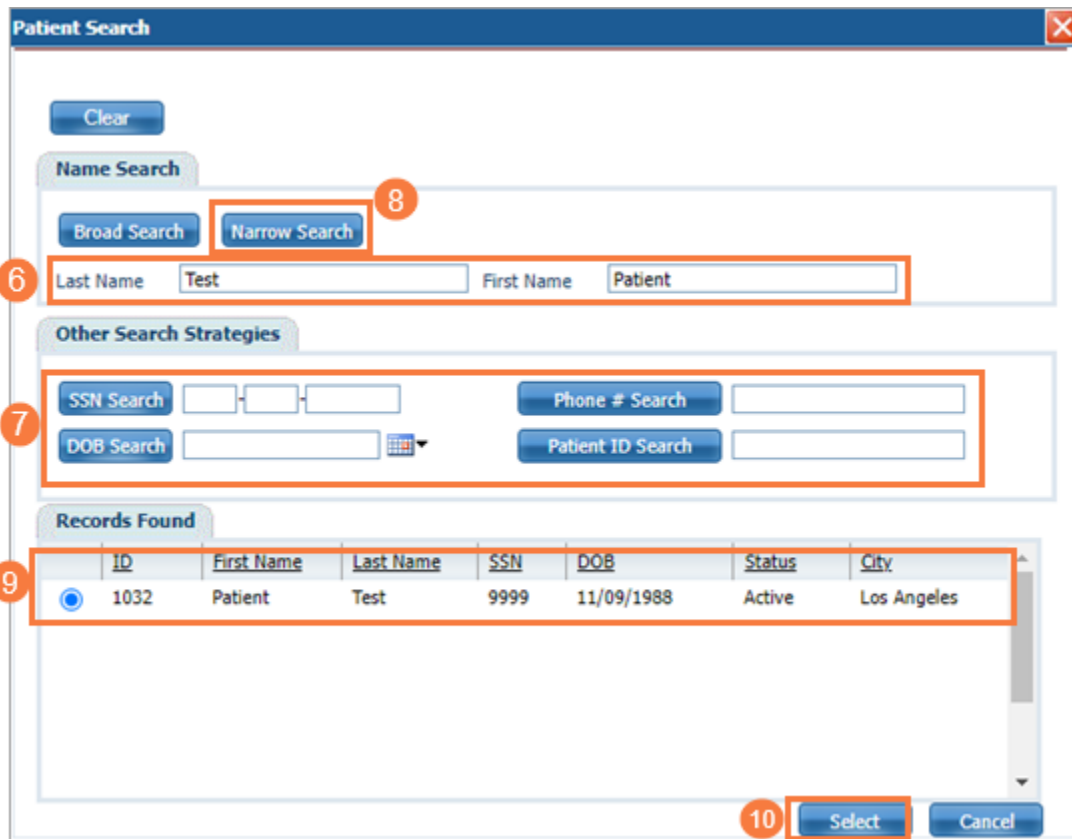
1. Select Search
2. Enter Medications
3. Select Medications (My Office)



4. Rx Start page will open.
5. Select Patient Search



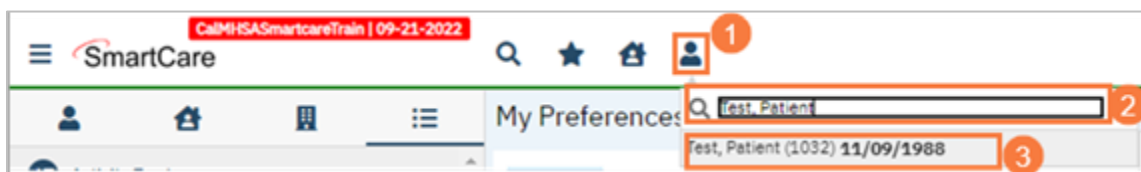
6. Enter Last Name or First Name or Both
7. Enter Other Information to narrow down search
8. Select Narrow Search
9. Locate and Select Client
10. Click Select



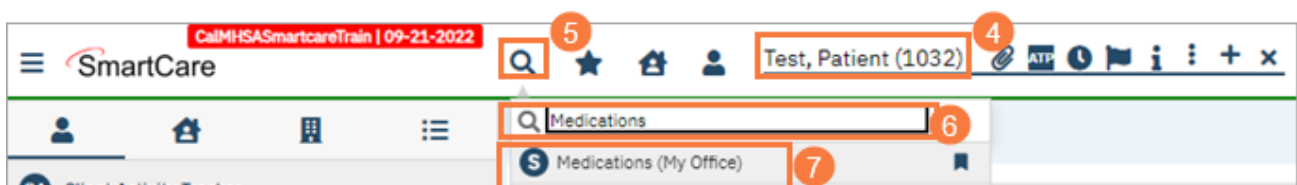
Patient Summary Screen should now display. Skip to ‘Patient Summary Screen’ or continue to second way of getting to Rx Screen.

## Second Way: Patient Screen to Rx Screen

1. Select Client Search
2. Enter Client Name (Last Name, First Name)
3. Select Client



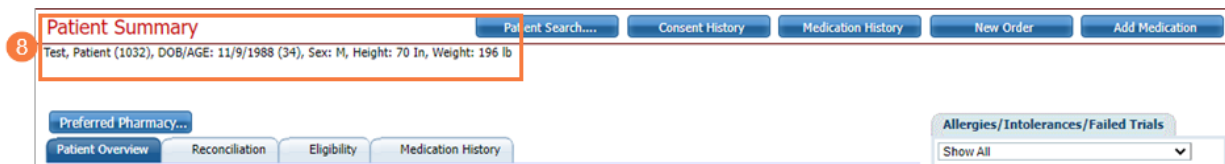
4. Clients Name should be visible.
5. Select Search
6. Enter Medication Management
7. Select Medication Management (Rx) (Client)



Patient Summary Screen should now display.

## Patient Summary Screen

8. Patient Summary should be visible with the Client Name, ID, DOB, etc. on screen.

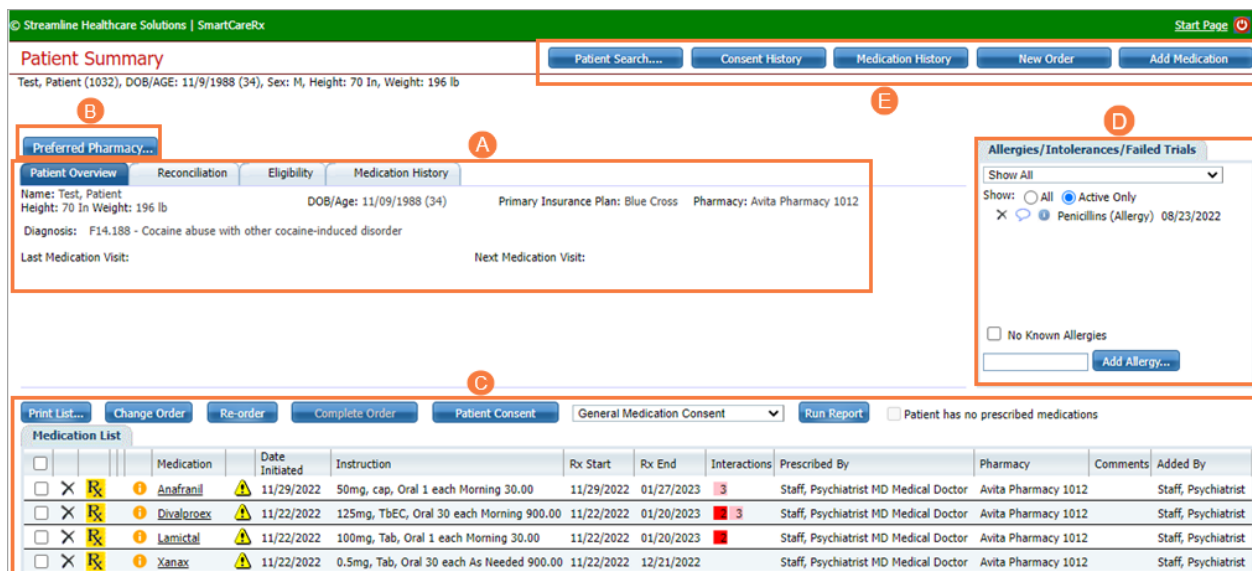


## Rx: Patient Summary Screen

The Patient Summary Screen is the starting point for working with clients' prescriptions and medications.

Main Components:

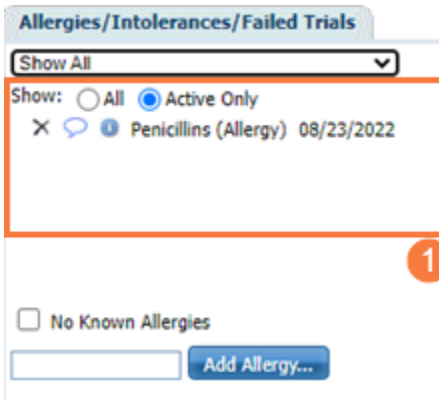
- Displays patient information including name, DOB, primary insurance, and diagnosis.
- Section to search for and save patient's preferred pharmacies.
- Section where patient's current medications are listed and can be printed, changed, re-ordered, etc.
- Section listing allergies and entering allergies. This can be done here or in SmartCare. The information pushes and pulls between the two.
- Area to select and view consent history, medication history, place new orders, add medications from outside, and search for new patients to display.



## Allergies, Intolerances, Failed Trials

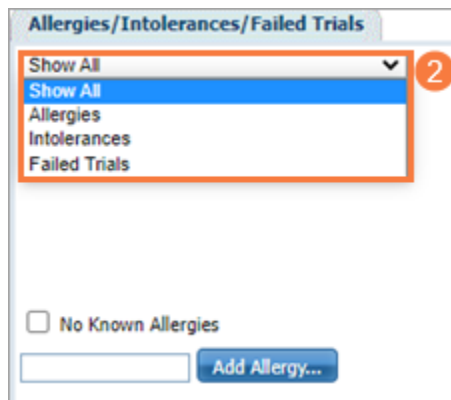
This section pulls in any allergies entered in SmartCare or entered directly here for the patient. Any allergy information entered here gets pushed back to SmartCare. This is also where you can add and see medications that the client shows intolerance or ineffectiveness towards.

1. Sections showing current allergies, intolerances, and/or failed trials.



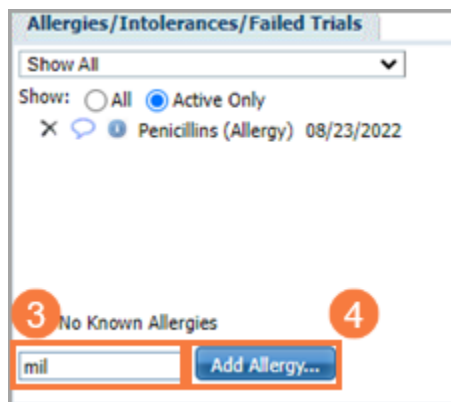
The screenshot shows the 'Allergies/Intolerances/Failed Trials' section. At the top, there is a tab labeled 'Allergies/Intolerances/Failed Trials'. Below the tab is a dropdown menu set to 'Show All'. Underneath, there are radio buttons for 'All' and 'Active Only', with 'Active Only' selected. A list of allergies is displayed, including 'Penicillins (Allergy)' with a date of '08/23/2022'. A red circle with the number '1' is positioned to the right of the list. At the bottom, there is a checkbox for 'No Known Allergies', an input field, and an 'Add Allergy...' button.

2. Select drop-down to Show All, Allergies, Intolerances, or Failed Trials.



The screenshot shows the 'Allergies/Intolerances/Failed Trials' section with the dropdown menu open. The dropdown menu is highlighted with a red box and a red circle with the number '2'. The menu options are 'Show All', 'Allergies', 'Intolerances', and 'Failed Trials'. Below the dropdown, there are radio buttons for 'All' and 'Active Only', with 'Active Only' selected. A list of allergies is displayed, including 'Penicillins (Allergy)' with a date of '08/23/2022'. At the bottom, there is a checkbox for 'No Known Allergies', an input field, and an 'Add Allergy...' button.

3. Adding Allergies: Enter at least 2 characters.
4. Select Add Allergy or Select 'Tab' button on keyboard.



The screenshot shows the 'Allergies/Intolerances/Failed Trials' section. The dropdown menu is set to 'Show All'. Below it, there are radio buttons for 'All' and 'Active Only', with 'Active Only' selected. A list of allergies is displayed, including 'Penicillins (Allergy)' with a date of '08/23/2022'. At the bottom, there is a checkbox for 'No Known Allergies', an input field containing the text 'mil', and an 'Add Allergy...' button. Red circles with the numbers '3' and '4' are positioned to the left and right of the input field, respectively.

## In the case of a substance giving an allergy:

5. Select Allergy (for example 'milk')
6. Select drop-downs and choose Reaction Level and Severity Level
7. Enter Comments
8. Choose Category
9. Click Select

The screenshot shows a 'Search Allergy' dialog box with the following components and numbered callouts:

- Allergies List:** A list of allergies with radio buttons. The 'milk' option is selected and circled with a red box and the number 5.
- Allergy Information:** Two dropdown menus. The 'Reaction' dropdown is set to 'Diarrhea' and the 'Severity' dropdown is set to 'High'. This section is circled with a red box and the number 6.
- Comments:** A text input field containing the text 'Not Good'. This field is circled with a red box and the number 7.
- Category:** Three radio buttons labeled 'Allergy', 'Intolerances', and 'Failed Trials'. The 'Allergy' option is selected. This section is circled with a red box and the number 8.
- Buttons:** Two buttons at the bottom, 'Select' and 'Cancel'. The 'Select' button is circled with a red box and the number 9.



## In the case of a medication being ineffective:

5. Select Allergy (in this case a medication, Milnacipran)
6. Enter Comments
7. Select Failed Trials
8. Click Select

**Search Allergy**

**Allergies List**

- Mili
- milk
- Milk Containing Products
- Milk of Magnesia
- milk thistle (Silybum marianum)
- Milkflow
- Milkflow Max
- Milkinol
- Millioled
- Milnacipran
- Milnacipran Analogues
- Milprem-200
- Milrinone
- miltefosine
- Miltown
- Myelo-Kit

**Allergy Information**

Reaction

Severity

**Comments**

Showed no improvement or changes. Not Effective.

Allergy  Intolerances  Failed Trials  Active

**Note:** Both Milk and Milnacipran are now in the Allergy List

**Allergies/Intolerances/Failed Trials**

Show All

Show:  All  Active Only

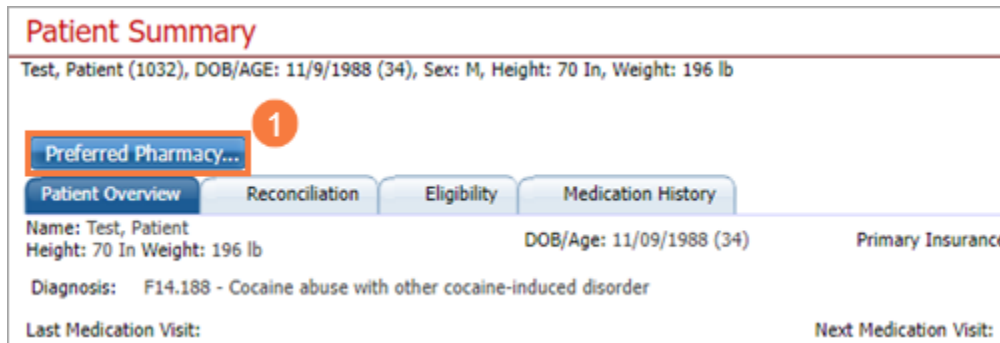
- X  milk (Allergy) 12/14/2022
- X  Milnacipran (Failed Trials) 12/14/2022
- X  Penicillins (Allergy) 08/23/2022

No Known Allergies

## Adding Preferred Pharmacies

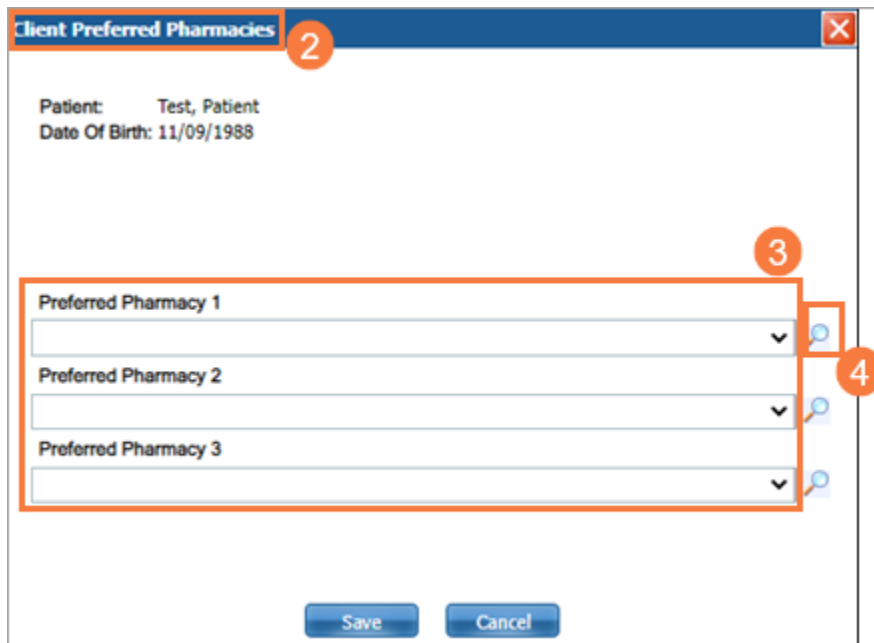
In this section we will show you how to add preferred pharmacies to make it quicker to select a pharmacy when prescribing medications. You can choose up to three pharmacies.

1. On Patient Summary screen, **Click Preferred Pharmacy**.



The screenshot shows the 'Patient Summary' interface. At the top, it displays patient information: 'Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb'. Below this is a navigation bar with buttons for 'Preferred Pharmacy...', 'Patient Overview', 'Reconciliation', 'Eligibility', and 'Medication History'. The 'Preferred Pharmacy...' button is highlighted with a red box and a circled '1'. Below the navigation bar, patient details are listed: 'Name: Test, Patient', 'Height: 70 In Weight: 196 lb', 'DOB/Age: 11/09/1988 (34)', and 'Primary Insurance'. A diagnosis is listed as 'F14.188 - Cocaine abuse with other cocaine-induced disorder'. At the bottom, there are fields for 'Last Medication Visit:' and 'Next Medication Visit:'.

2. Client Preferred Pharmacies window should pop up.
3. Preferred Pharmacies will show here if you have some. **Select drop-down** to choose the pharmacy in a preferred order. If you don't have any yet, proceed to step 4.
4. **Click Magnifying Glass** to open a screen to search for pharmacies.



The screenshot shows the 'Client Preferred Pharmacies' window. At the top, it displays patient information: 'Patient: Test, Patient' and 'Date Of Birth: 11/09/1988'. Below this are three entries for preferred pharmacies, each with a text field and a dropdown arrow. The first entry is labeled 'Preferred Pharmacy 1', the second 'Preferred Pharmacy 2', and the third 'Preferred Pharmacy 3'. A red box highlights the three entries, with a circled '3' next to it. A magnifying glass icon is visible next to each entry, with a circled '4' next to the first one. At the bottom of the window are 'Save' and 'Cancel' buttons.

5. Search Criteria window should pop up.
6. **Enter Search Criteria.** In this example we used 'Test' for name and populated the state field.
7. **Click Search.**
8. **Select Radio Button** for desired pharmacy that gets listed.
9. **Click Select.**

The screenshot shows a 'Pharmacy' search window. At the top, there is a 'Search Criteria' section (5) with input fields for Name (Test), ID, Phone #, Address, City, State (California), NCPDP Number, Fax #, Zip, and Specialty. A 'Search' button (7) and a 'Clear' button are at the bottom right of this section. Below the search criteria is a 'Records Found' table (8) with one entry: ID 1421, Active Y, Pref N, Name Test Pharmacy, Address 123 Any Street, Any City, CA, 54321, Phone 1231231234, Fax 3213214321, and NCPDP 89456123. At the bottom of the window, there are 'Previous' and 'Next' links, a '(Page 1 of 1)' indicator, and a 'Select' button (9) and a 'Cancel' button.

10. We are taken back to Client Preferred Pharmacies window. The chosen pharmacy is entered. Continue with selecting two more if desired.
11. **Click Save.**

The screenshot shows the 'Client Preferred Pharmacies' window. It displays patient information: 'Patient: Test, Patient' and 'Date Of Birth: 11/09/1988'. Below this, there are three dropdown menus for 'Preferred Pharmacy 1', 'Preferred Pharmacy 2', and 'Preferred Pharmacy 3'. The first dropdown (10) is selected and shows 'Test Pharmacy'. At the bottom of the window, there are 'Save' (11) and 'Cancel' buttons.

## Creating a New Order (Prescription)

In this section we will be creating a New Order (Prescription). We will be starting from the Patient Summary Screen.

1. Click New Order

The screenshot shows the 'Patient Summary' interface. At the top, there are navigation buttons: 'Patient Search...', 'Consent History', 'Medication History', 'New Order', and 'Add Medication'. The 'New Order' button is highlighted with a red box and a red circle containing the number '1'. Below the navigation bar, the patient's information is displayed: 'Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb'. There are tabs for 'Preferred Pharmacy...', 'Patient Overview', 'Reconciliation', 'Eligibility', and 'Medication History'. The 'Patient Overview' tab is active, showing patient details: Name: Test, Patient; Height: 70 In Weight: 196 lb; DOB/Age: 11/09/1988 (34); Primary Insurance Plan: Blue Cross; Pharmacy: Test Pharmacy; Diagnosis: F14.188 - Cocaine abuse with other cocaine-induced disorder; Last Medication Visit: ; Next Medication Visit: . On the right side, there is a panel for 'Allergies/Intolerances/Failed Trials' with a 'Show All' dropdown menu. The 'Show' options are 'All' (unselected) and 'Active Only' (selected). The list of allergies includes: 'milk (Allergy)' dated 12/14/2022, 'Milnacipran (Failed Trials)' dated 12/14/2022, and 'Penicillins (Allergy)' dated 08/23/2022. There is a checkbox for 'No Known Allergies' and an 'Add Allergy...' button.

## Medication Order Screen

The New Medication Order screen should be open. This is where you will enter the necessary information to prescribe medications.

### Sections

- A. Order: Section to select 'Send Directly to Pharmacy (default) or Print Script. Also shows prescriber information including DEA # and Prescribing Location.
- B. Medication: Section that allows for searching and selecting of medication, diagnosis/purpose, and instructions/comments. Here we also add/adjust strength, dose, qty, etc. of medication
- C. Once medication is finished it gets inserted in this screen for review.
- D. Prescribe or Queue Order: Buttons to choose to prescribe now or put in queue to prescribe later.

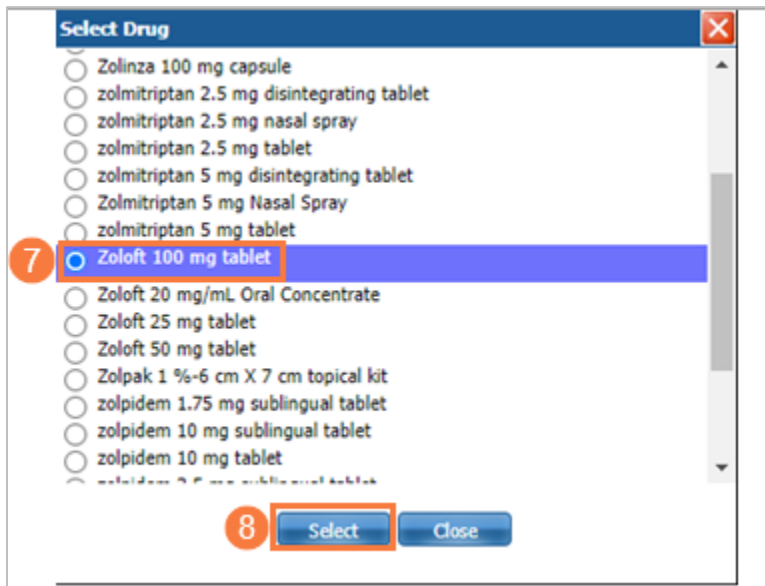
2. **Send Directly to Pharmacy (default selection)** – Preferred pharmacy should be listed. If you prefer to print script, drug information, or chart copy skip to step 4.
3. **Select drop-down** to choose another preferred pharmacy or **Click Magnifying Glass** to search database for another pharmacy. Once a pharmacy is chosen it will automatically be selected as a preferred pharmacy.
4. If not sending to pharmacy, **Click PrintScript, Print Drug Information, or Print Chart Copy** to print desired information. It will automatically print to printer attached to workstation.
5. Verify Prescriber, DEA#, and Prescribing Location are listed. Order date cannot be back dated or future dated. All are required to prescribe. Select Verbal Order Read Back if needing to confirm order with prescriber.

6. **Enter Drug Name (at least 3 characters)** – hit 'tab' on keyboard or click screen just outside of selection. Another window will popup for you to choose medication.

NOTE: Click orange circle with exclamation point to view drug description from Medline.

7. **Select Radio Button** next to desired medication.

8. Click Select.



Medication should populate the screen like below. Once drug name is populated, the drop down becomes active and will show you other names, such as generic names, of the drug chosen.

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X 100mg, Tab, Oral	f	each		12/15/2022	0		Tablet				
X											

NOTE: Click orange circle with exclamation point near drug name to view drug definition from Medline which can be printed.

9. Permit Changes By Other Users – on by default.
10. Select drop-down and choose **Diagnosis or Purpose** if wanting to associate medication to diagnosis or other.
11. Select drop-down and choose **Active Coverage** (if formulary is turned on).
12. Check **Dispense as Written**.
13. Select **Save as Template** – if wanting to save this configuration and use again.
14. Enter **Instruction Text** for client put on bottle.
15. Enter **Desired Outcome** for informational purposes if wanted.
16. Enter **Comment** – Not put on bottle. Used to communicate with pharmacy. Select **Include On Prescription**. Comment changes to Note to Pharmacy. See next image.

NOTE: 16. Continued. Hover over blue circle with 'i' for more information.

17. Select drop-down to change Strength if desired.

The screenshot shows a medication entry form with several columns: Strength, Dose, Unit, Directions, Rx Start, Days, Dispense Qty, Potency Unit, Refills, Sample, Stock, and Rx End. A dropdown menu is open under the Strength column, showing options: 100mg, Tab, Oral; 20mg/mL, Conc, Oral; 25mg, Tab, Oral; 50mg, Tab, Oral; and 100mg, Tab, Oral. The first option is selected. A red circle with the number 17 is placed over the dropdown arrow.

18. Enter Dose

19. Select drop-down, choose unit if needed.

The screenshot shows the same medication entry form. The Dose and Unit dropdowns are highlighted with red boxes and labeled with the number 18. The Dose dropdown is set to '1' and the Unit dropdown is set to 'each'. The Directions dropdown is set to 'Morning'. A red circle with the number 19 is placed over the Unit dropdown arrow.

20. Select drop-down and choose directions.

The screenshot shows the medication entry form with the Directions dropdown menu open. The menu lists various directions: Morning, Annually, Monthly, Daily, Morning, Daily at Noon, Evening, Bedtime, Twice a day, Three times a day, 4 Times per Day, 5 Times per Day, Q4, Q6, Q8, Every 12 Hours, QpNoon, Every Other Day, Q3D, and Weekly. A red circle with the number 20 is placed over the dropdown arrow.

21. Enter Rx Start Date

22. Enter Days

23. Dispense Qty is automatically calculated if days and dose is filled. Select 'Tab' button on keyboard or click next to area for it to automatically populate.

24. Select drop-down, choose Potency Unit.

25. Enter Refills.

26. Enter Sample Qty – if any.

27. Enter Stock if any.

28. Rx End date is automatically determined from dose, directions, Rx Start date, and Days.

29. Click Insert to add to Medication List. It is not yet prescribed.

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X 100mg, Tab, Oral	f 1	each	Morning	12/15/2022	30	30	Tablet				01/13/2023
X	f						Milliliter Tablet				

Buttons: More Steps, Insert, Clear

- 30. Select X to clear line of entered information and start over if desired.
- 31. Click Clear to completely clear drug order from screen to start again.

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X 100mg, Tab, Oral	f 1	each	Morning	12/15/2022	30	30	Tablet				01/13/2023
X	f										

Buttons: More Steps, Insert, Clear

After clicking insert we can now see the medication in the list. We can either prescribe the medication now or select Queue Order, which puts the medication in a queue to be prescribed later. For now, we will prescribe.

Please note, we still will have one more screen to review and confirm prescription before actually prescribing.

- 32. Select Prescribe.

**New Medication Order** Prescribe Queue Order X

Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb

Order:  Send Directly to Pharmacy  PrintScript  Print Drug Information  Print Chart Copy

Pharmacy: Test Pharmacy - Any City, CA - 123 Any Street Printer: <Manual Selection>

Prescriber: Staff, Psychiatrist MD Medical Dc DEA #: 543456789090 Order Date: 12/15/2022 Prescribing Location: Telehealth  Verbal Order Read Back

Medication:  Permit Changes By Other Users

Drug: [Dropdown] Dx/Purpose: [Dropdown] Active Coverage: [Dropdown]  Dispense as Written

Instruction Text: [Text] Desired Outcome: [Text] Comment: [Text]  Include On Prescription

Titrate... [Text]

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X	f										
X	f										

Buttons: More Steps, Insert, Clear

Medication List **Formulary**

	Medication	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
<input checked="" type="checkbox"/>	Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning	12/15/2022	01/13/2023	0	N	3



This is the last screen to review the prescription.

- A) This section contains the patient information, prescriber information, and pharmacy information. It shows the medication(s) that will be prescribed.
- B) Here we can go back and change the order, see a preview of what the pharmacist will see, or finally submit the prescription.
  - A. Click Prescribe.

**Prescribe** Change Order | Pharmacy Preview... | Prescribe X

Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb  
 Prescription has not yet been submitted. To submit please click the Prescribe button

**Client Information**  
**Test, Patient T**  
 Gender: M DOB: 11/09/1988  
 123 Main St Suite 208 Suite 208 Los Angeles, CA 90019

**Prescriber Information**  
**Staff, Psychiatrist**  
 1 My Street My City, CA 11111  
 P: 123-123-1234 F: 123-123-1235  
 DEA: 543456789090

**Pharmacy Information**  
**Test Pharmacy - NCPDP ID: 89456123**  
 123 Any Street, Any City, CA 54321  
 P: 123-123-1234 F: 321-321-4321

Ready to Sign	Medication	Directions	Quantity	Refills	Order Date	Start Date	End Date	Note to Pharmacy	Special Instructions	Substitutions
	Zoloft 100 mg tablet	1.00 (each) Morning	30	0	12/15/2022	12/15/2022	01/13/2023		Take with food. Once a day.	Allowed

By completing the two-factor authentication protocol at this time, you are legally signing the prescriptions(s) and authorizing the transmission of the above information to the pharmacy for dispensing. The two-factor authentication protocol may only be completed by the practitioner whose name and DEA registration number appear above.

You are taken back to the Patient Summary screen which now shows the medication we just prescribed along with all the others that have been prescribed or are being taken.

**Patient Summary** Patient Search.... | Consent History | Medication History | New Order | Add Medication

Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb

**Preferred Pharmacy...**

**Patient Overview** | Reconciliation | Eligibility | Medication History

Name: Test, Patient DOB/Age: 11/09/1988 (34) Primary Insurance Plan: Blue Cross Pharmacy: Test Pharmacy  
 Height: 70 In Weight: 196 lb  
 Diagnosis: F14.188 - Cocaine abuse with other cocaine-induced disorder  
 Last Medication Visit: Next Medication Visit:

**Allergies/Intolerances/Failed Trials**

Show All v

Show:  All  Active Only

- X i milk (Allergy) 12/14/2022
- X i Milnacipran (Failed Trials) 12/14/2022
- X i Penicillins (Allergy) 08/23/2022

No Known Allergies

Add Allergy...

Print List...
Change Order
Re-order
Complete Order
Patient Consent
General Medication Consent v
Run Report
 Patient has no prescribed medications

<b>Medication List</b>												
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comment
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	<span style="color: red;">3</span> <span style="color: red;">1</span>	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	<span style="color: yellow;">2</span> <span style="color: red;">3</span>	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	<span style="color: yellow;">2</span>	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023	<span style="color: red;">1</span>	Staff, Psychiatrist MD Medical Doctor	Test Pharmacy	<span style="color: blue;">i</span>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor		

Take with food. Once a day.

## Drug/Allergy Interaction Warnings

In the previous training steps, we prescribed a medication that had no interactions that would have prevented us from proceeding in the process. It may so happen that we are prescribing medications that may have adverse interactions with each other or with an allergy we have listed for the client. This will require us to either read the warning and acknowledge the warning or remove the medication from being prescribed.

- A. Error message indicating we can't prescribe because of allergy and drug interaction warnings.
- B. Allergic Warning Listed – 'A'
  1. **Select X** to delete medication from list otherwise we can't prescribe. It will ask you to confirm. Select Yes.
- C. Indication of drug interaction that needs acknowledgement. Read warning, **Select Acknowledge** if desired.

NOTE: Hovering over warning indicators will give you the allergy and/or drugs that are causing the issue. The number indicates the severity, and the color matching indicates which drugs are interacting with each other.

**New Medication Order**
Prescribe Queue Order X

Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb

✖ At least one of the drugs being prescribed interacts with a patient allergy. Please remove it from the list to proceed. A

**Order**

Send Directly to Pharmacy

Pharmacy Test Pharmacy - Any City, CA - 123 Any Street

Prescriber Staff, Psychiatrist MD Medical Dc DEA # 543456789090 Order Date 12/15/2022 Prescribing Location Telehealth

PrintScript  Print Drug Information  Print Chart Copy

Printer <Manual Selection>

Verbal Order Read Back

**Medication**  Permit Changes By Other Users

Drug  Dx/Purpose  Active Coverage   Dispense as Written

Instruction Text  Desired Outcome  Comment   Include On Prescription

**Titrate...**

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X											
X											

**More Steps** Insert Clear

**Medication List** Formulary

	Medication	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
<input checked="" type="checkbox"/>	Aspirin	12/15/2022	325mg, cap, oral 1 each Daily	12/15/2022	01/13/2023	0	N	3 A A
<input checked="" type="checkbox"/>	Phenelzine	12/15/2022	15mg, Tab, Oral 1 each QpNoon	12/15/2022	01/13/2023	0	N	1 Acknowledge

The drug interaction and allergy warnings are also seen in the medication list on the Patient Summary screen. The matching colors indicate which drugs are interacting and the numbers indicate with which severity.

Medication List	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input checked="" type="checkbox"/>	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist
<i>Take with food. Once a day.</i>										
<input checked="" type="checkbox"/>	Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023					Staff, Psychiatrist
<input checked="" type="checkbox"/>	Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor			Staff, Psychiatrist

## Medication List

The Patient Summary screen in SmartCare Rx contains a medication list which can show all the medications a client is taking. This list can contain medications you prescribe and allows for adding medications that others have prescribed or have been purchased over the counter. For the ones we have prescribed, it can allow us to re-order drugs on the list, change the order of a drug on the list, as well as show us drug interaction warnings.

- Select X** to remove (discontinue) medication from list.
- Rx** symbol indicates ordered medication and **Black Bottle** indicates non-ordered medication.
- Select Orange Information Circle** to view educational material about drug and print.
- Yellow Exclamation** means missing patient consent and **Green Checkmark** means consent obtained.
- Allergy/Drug Interaction Warnings.** The number indicates the severity and the matching colors indicate which drugs are interacting.
- Comments** in this section are not what is put on the bottle but what is communicated with the pharmacy.

Medication List																
<input type="checkbox"/>	A	B	C	D	Medication	Date Initiated	Instruction	Rx Start	Rx End	E	Interaction	Prescribed By	Pharmacy	F	Comments	Added By
<input type="checkbox"/>	X	Rx	i	✓	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	■	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012			Staff, Psychiatrist
<input type="checkbox"/>	X	Rx	i	⚠	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2	■	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012			Staff, Psychiatrist
<input type="checkbox"/>	X	Rx	i	⚠	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	■	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012			Staff, Psychiatrist
<input type="checkbox"/>	X	Rx	i	⚠	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022			Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012			Staff, Psychiatrist
<input type="checkbox"/>	X	Rx	i	⚠	Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023			Staff, Psychiatrist MD Medical Doctor	Test Pharmacy			Staff, Psychiatrist
<input type="checkbox"/>	X	⚫	i		Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022				Primary Care Doctor				Staff, Psychiatrist

## Adding Medications (Prescribed Elsewhere)

If we want to document medications that the client is taking that were prescribed somewhere else or by another provider, we can do that with the 'Add Medication' button at the top right of the Patient Summary screen.

### 1. Select Add Medication

**Patient Summary** Patient Search.... Consent History Medication History New Order Add Medication

Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb

Preferred Pharmacy... 1

**Patient Overview** | Reconciliation | Eligibility | Medication History

Name: Test, Patient      DOB/Age: 11/09/1988 (34) Primary Insurance Plan: Blue Cross Pharmacy: Test Pharmacy  
 Height: 70 In Weight: 196 lb  
 Diagnosis: F14.188 - Cocaine abuse with other cocaine-induced disorder  
 Last Medication Visit:      Next Medication Visit:

**Allergies/Intolerances/Failed Trials**

Show All  All  Active Only

- X  Aspirin (Allergy) 12/15/2022
- X  milk (Allergy) 12/14/2022
- X  Milnacipran (Failed Trials) 12/14/2022
- X  NSAIDS (Non-Steroidal Anti-Inflammatory Drug) (Allergy) 12/15/2022
- X  Penicillins (Allergy) 08/23/2022

No Known Allergies

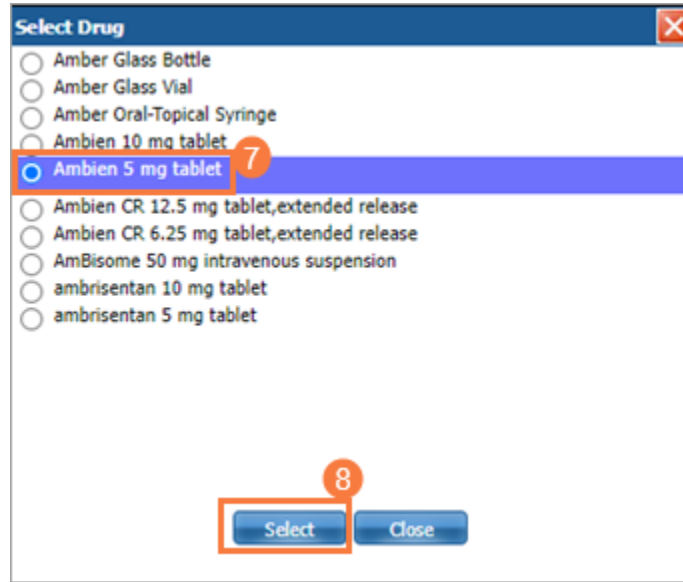
Add Allergy...

2. Add Medication screen should be visible now and it looks pretty much the same as the New Order screen.

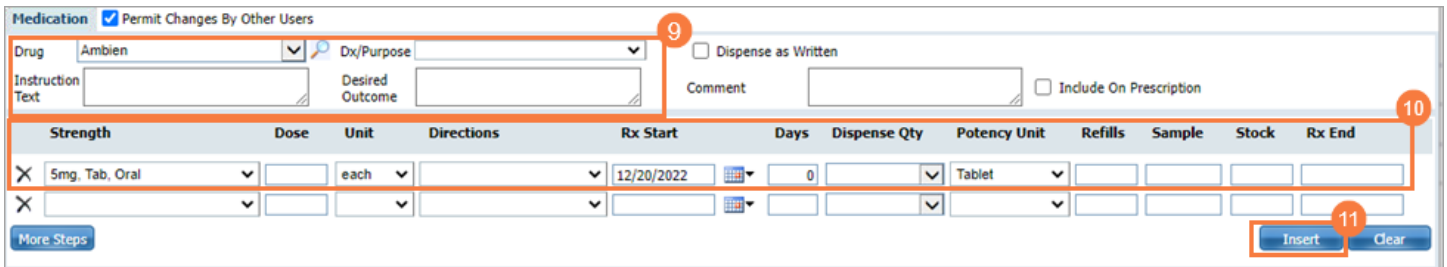
3. Prescriber will be blank as this is for internal prescribers but we are adding a medication from outside.
4. **Select Date Initiated** as its necessary to be listed on the MAR.
5. **Select drop-down and Choose Source.**

6. **Type drug name or at least 3 characters of drug** and **Press tab** on keyboard or **Select drop-down** for popup to choose drug.

7. Click Radio Button for the drug.
8. Click Select



9. Enter any instruction text or desired outcomes if needed. It isn't required to save on medication list but it will show on MAR.
10. Adjust the strength, if necessary, enter the dose, direction, days, etc. as described to you.
11. **Select Insert.**



12. Verify drug in the list.
13. Click Save.

**Add Medication (Not Ordered Locally)** Save X

**13**

**Allergies/Intolerances/Failed Trials**

Show:  All  Active Only

- X  Aspirin (Allergy) 12/15/2022
- X  milk (Allergy) 12/14/2022
- X  Milnacipran (Failed Trials) 12/14/2022
- X  NSAIDS (Non-Steroidal Anti-Inflammatory Drug) (Allergy) 12/15/2022
- X  Penicillins (Allergy) 08/23/2022

No Known Allergies

---

**Order**

Prescriber: [Dropdown] Date Initiated: 12/20/2022 Source: Patient Verbal

**Medication**  Permit Changes By Other Users

Drug: [Dropdown] Dx/Purpose: [Dropdown]  Dispense as Written

Instruction Text: [Text] Desired Outcome: [Text] Comment: [Text]  Include On Prescription

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X [Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Text]	[Text]	30	[Dropdown]	[Text]	[Text]	[Text]	[Text]
X [Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Text]	[Text]	[Text]	[Dropdown]	[Text]	[Text]	[Text]	[Text]

**12**

**Medication List**

Medication	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
<input type="checkbox"/> X <input checked="" type="checkbox"/> Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023	0	N	

Drug now shows on medication list with a little black bottle indicating an outside medication.

Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input type="checkbox"/> X <input checked="" type="checkbox"/> Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/> X <input checked="" type="checkbox"/> Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/> X <input checked="" type="checkbox"/> Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/> X <input checked="" type="checkbox"/> Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/> X <input checked="" type="checkbox"/> Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist
<input checked="" type="checkbox"/> X <input checked="" type="checkbox"/> Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023					Staff, Psychiatrist
<input checked="" type="checkbox"/> X <input checked="" type="checkbox"/> Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor			Staff, Psychiatrist



## Patient Consent

On the patient summary screen under the medications list you can see the yellow triangles with an exclamation point for the medications that need patient consents. The green checkmark indicates the patient has already consented to the medication.

	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input type="checkbox"/>	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	Zolofit	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist

1. Select box of one or more medications that need consent.
2. Click Patient Consent button.

	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input type="checkbox"/>	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	Zolofit	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist
<input type="checkbox"/>	Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023					Staff, Psychiatrist
<input type="checkbox"/>	Tivlenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor			Staff, Psychiatrist

3. The Patient Consent screen should be visible.
4. Scroll through the document to read.
5. As Prescribing Staff Click Sign

Patient Consent 3

Test Patient (1052), DOB: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb,

Consent Form: Standard Medical Staff Name: Staff, Psychiatrist Status: Not Signed Edit Print... Revoke

CalMHSA SmartcareTrain | 09-21-2022

Informed Consent For Medication

12/20/2022 12:42:31 PM

Patient: Test, Patient

1. I have had the opportunity to discuss this medication with my psychiatrist and/or nurse, have received written information and have had my questions answered.
2. The risks and benefits of this medication were explained to me.
3. The most common side effects were explained to me.
4. If I am to be taking an anti-psychotic medication, the risks of tardive dyskinesia have been explained to me.
5. If I encounter any side effects, I will report them to the physician or nurse at any time. If they are not available, I will report them to another staff person.
6. Treatment alternatives were discussed with me including the option of not taking medicine.
7. I understand that I have the right to accept or refuse medication by informing the physician or nurse at any time.

Staff, Psychiatrist (Medical Staff)

Test, Patient (Patient)

---Select Relation---

Sign Close 5

Electronic signature should show at bottom of document.

**Electronically Signed By :**  
Psychiatrist Staff (Medical Staff) on 12/20/2022

6. The client will be next to sign which require a signature pad or mouse/tracking pad. **Select Sign.**

A dialog box with three radio buttons:  Staff, Psychiatrist (Medical Staff),  Test, Patient (Patient), and  ---Select Relation---. To the right of the second radio button is a dropdown menu and a text input field. An orange arrow points from the second radio button to a blue 'Sign' button, which is circled in orange with a red '6' next to it. A blue 'Close' button is to the right of the 'Sign' button.

7. **Select Signature Method.** Input signature.

8. **Click Sign**

A window titled 'Get Signature' with a close button in the top right. The main area contains a large handwritten signature 'Test'. Below the signature area is a row of radio buttons:  Password,  Signature Pad,  Mouse/Touchpad,  Verbally Agreed Over Phone, and  Patient Signed Paper Document. A red '7' is next to the 'Mouse/Touchpad' radio button. Below the radio buttons is a text input field. At the bottom right are three buttons: 'Sign' (circled in orange with a red '8'), 'Clear', and 'Cancel'.

9. Both signatures should be visible if you scroll down to end of document.

10. **Click Close.**



**Patient Consent**  
 Test, Patient (1032), DOB/AGE: 11/9/1988 (34), Sex: M, Height: 70 In, Weight: 196 lb,

Consent Form : Standard Medical Staff Name : Staff, Psychiatrist Status : Signed by Patient Edit Print... Revoke

**Electronically Signed By :**

Psychiatrist Staff (Medical Staff) on 12/20/2022

Test, Patient (Patient) on 12/20/2022

*Test*

Staff, Psychiatrist (Medical Staff)  
 Test, Patient (Patient)  
 ---Select Relation---

Sign Close

The two yellow triangles with exclamation points turned to green checkmarks indicating there has been consent.

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist

## Changing a Medication Order

Changing a medication prescription can be done from the patient summary screen in the Rx system. Locate the medication list on the screen.

1. Select box of medication.
2. Click Change Order.

Print List... Change Order Re-order Complete Order Patient Consent General Medication Consent Run Report  Patient has no prescribed medications

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023					Staff, Psychiatrist
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor			Staff, Psychiatrist

3. The Change Medication Order screen should now be visible.

4. **Select Radio Button** of medication. The details of the order should populate the screen where you can make any adjustments to the order including the dose, directions, days, etc. If changes are being made after the date of the original you may need to change the Rx Start date.
5. **Click Modify** when done with changes.
6. **Click Prescribe** to continue with sending the changed order to the pharmacy.

**Change Medication Order** 3

Prescribe 6 Queue Order

Order

Send Directly to Pharmacy  PrintScript  Print Drug Information  Print Chart Copy

Pharmacy Test Pharmacy - Any City, CA - 123 Any Street Printer <Manual Selection>

Prescriber Staff, Psychiatrist MD Medical Dc DEA # 543456789090 Order Date 12/20/2022 Prescribing Location Telehealth Verbal Order Read Back

Medication  Permit Changes By Other Users

Drug Zoloft 1 Dx/Purpose Other Active Coverage Disperse as Written

Instruction Text Take with food. Once a day. Desired Outcome Comment Have patient call when needing refill.  Include On Prescription 1

Titrate... Recommended Adult Min/Max Daily Dose Strength: 12.5 mg - 200 mg

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X 100mg, Tab, Oral	1	each	Morning	12/15/2022	30	30	Tablet	0	0	0	01/13/2023
X											

More Steps 5 Modify Clear

Medication List 4 Formulary

Medication	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
X Zoloft <i>Take with food. Once a day.</i>	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023	0	N	3

## Re-Ordering a Medication

Re-ordering a medication can be done from the patient summary screen in the Rx system. Locate the medication list on the screen.

1. **Select box** of medication.
2. **Click Re-Order**.

Print List... Change Order 2 Re-order Complete Order Patient Consent General Medication Consent Run Report  Patient has no prescribed medications

Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
X Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist
X Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023					Staff, Psychiatrist
X Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor			Staff, Psychiatrist

3. Re-Order screen should be open.

- Select Radio Button of medication. Verify dates are correct or as wanted.
- Click Prescribe to continue with the re-ordering process to the pharmacy.

**Re-Order Medication Order** 3

Test, Patient (1032), DOB/AGE: 11/9/1988 (34y), Sex: M, Height: 70 In, Weight: 196 lb

Order

Send Directly to Pharmacy  PrintScript  Print Drug Information  Print Chart Copy

Pharmacy Test Pharmacy - Any City, CA - 123 Any Street Printer <Manual Selection>

Prescriber Staff, Psychiatrist MD Medical Dc DEA # 543456789090 Order Date 12/20/2022 Prescribing Location Telehealth Verbal Order Read Back

Medication  Permit Changes By Other Users

Drug Zoloft Dx/Purpose Other Active Coverage Dispense as Written

Instruction Text Take with food. Once a day. Desired Outcome Comment Have patient call when needing refill. Include On Prescription

Titrate... Recommended Adult Min/Max Daily Dose Strength: 12.5 mg - 200 mg

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X 100mg, Tab, Oral	1	each	Morning	12/20/2022	30	30	Tablet	0	0	0	01/18/2023

More Steps Modify Clear

Medication List Formulary

Medication	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
X Zoloft Take with food. Once a day.	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/20/2022	01/18/2023	0	N	3

## Discontinuing a Medication

Discontinuing a medication can be done in the patient summary screen of the Rx system.

- Select X of medication from the medication list that you would like to discontinue.

Print List... Change Order Re-order Complete Order Patient Consent General Medication Consent Run Report Patient has no prescribed medications

Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
X Anafranil	11/29/2022	50mg, cap, Oral 1 each Morning 30.00	11/29/2022	01/27/2023	3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Divalproex	11/22/2022	125mg, TbEC, Oral 30 each Morning 900.00	11/22/2022	01/20/2023	2 3	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Lamictal	11/22/2022	100mg, Tab, Oral 1 each Morning 30.00	11/22/2022	01/20/2023	2	Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Xanax	11/22/2022	0.5mg, Tab, Oral 30 each As Needed 900.00	11/22/2022	12/21/2022		Staff, Psychiatrist MD Medical Doctor	Avita Pharmacy 1012		Staff, Psychiatrist
X Zoloft	12/15/2022	100mg, Tab, Oral 1 each Morning 30.00	12/15/2022	01/13/2023		Staff, Psychiatrist MD Medical Doctor	Test Pharmacy		Staff, Psychiatrist
X Ambien	12/20/2022	5mg, Tab, Oral 1 each Bedtime	12/20/2022	01/18/2023					Staff, Psychiatrist
X Tylenol	12/14/2022	325mg, cap, oral 1 each As Needed 30.00	12/14/2022			Primary Care Doctor			Staff, Psychiatrist

- Click Yes if you choose to discontinue the medication.

**Confirmation Message**

Are you sure you want to Discontinue this Medication?

2 Yes No

- Enter Discontinue Reason screen should pop up.

4. Select drop-down to choose reason.

Enter Discontinue Reason

....Select Discontinue Reason....

Discontinuation Letter

Fax

Test Pharmacy - Any City, CA - 123 Any Street

Print

None

Discontinue Cancel

5. Enter further details describing reason for discontinuing.
6. Choose discontinuation letter method.
7. Click Discontinue.

Enter Discontinue Reason

Changed to other form of drug

Discontinuation Letter

Fax

Test Pharmacy - Any City, CA - 123 Any Street

Print

None

Discontinue Cancel

# Medical Clinical Documents

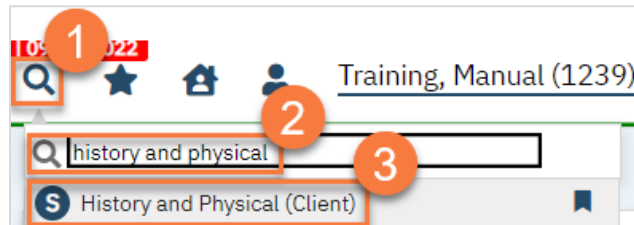
There are additional documents, such as assessments and progress notes, that are specialized for medication support services. In this section, we'll cover these documents, as well as any others that are entered in the main SmartCare environment, rather than in the Rx module.

## Nursing Assessment

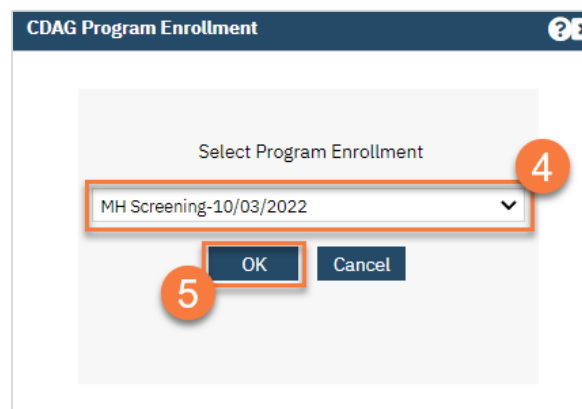


## History and Physical

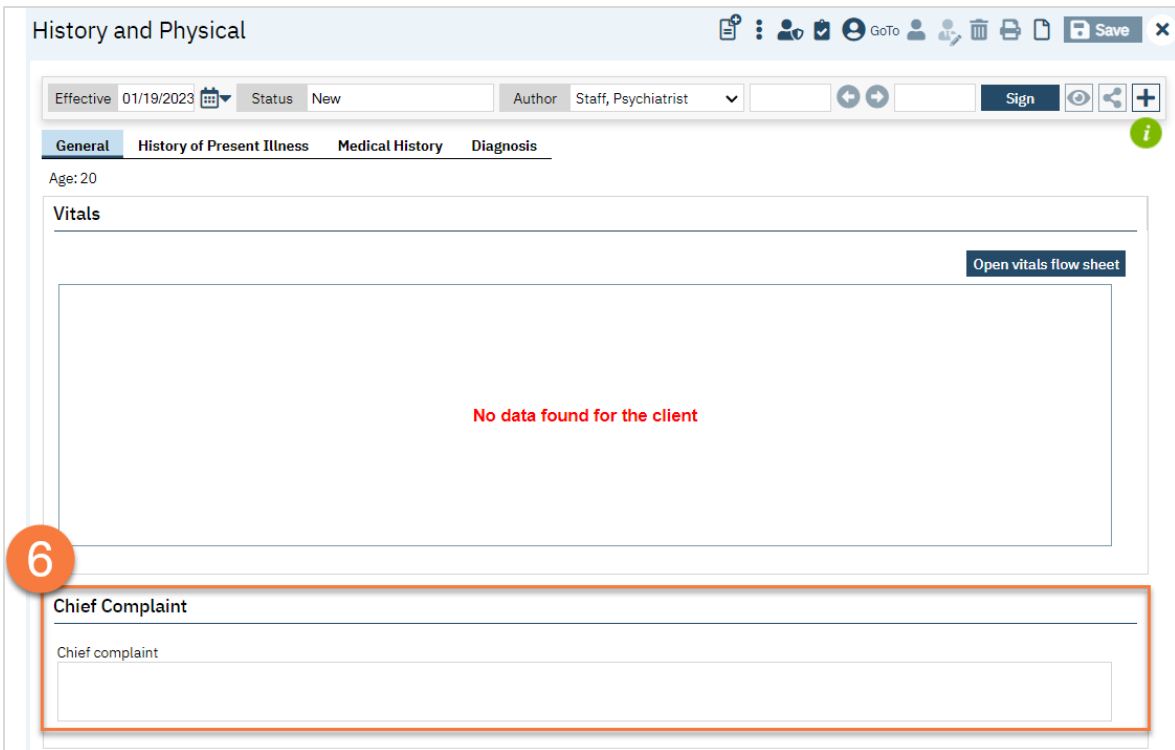
1. You must first have the client open, then **click the Search icon**.
2. **Type "History and Physical"** into the search bar.
3. **Click to select "History and Physical (Client)"** from the search results.



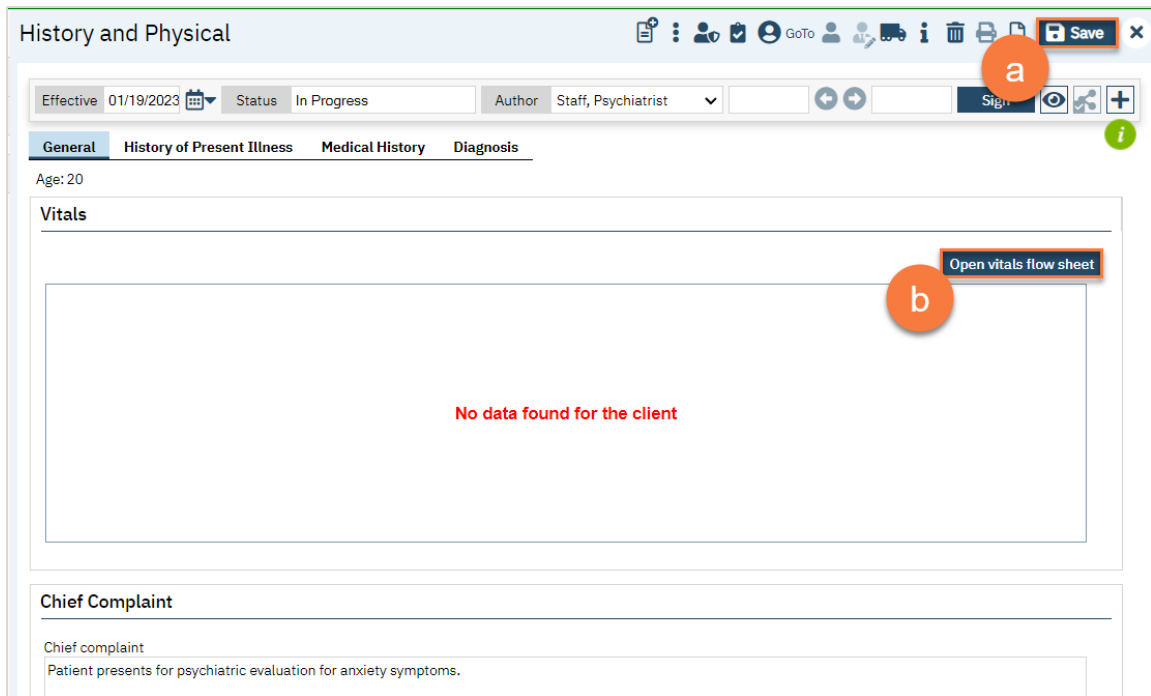
4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
5. **Click OK** to continue.



6. The History and Physical will open to the General tab. **Enter the chief complaint.**



- a. If you want to add vitals, click **Save**.
- b. Then click on the **“Open vitals flow sheet”** button.



- c. This brings you to the New Entry Flow Sheets screen. **Enter the vitals information that you have.**

**New Entry Flow Sheet**

Date/Time  
 Select Date: 01/19/2023 | Enter Time: 01:13 PM | Program: Outpatient MH Adult-I

Height/Weight/BMI  
 Height: 68.50 In | Weight: 180.00 lb | BMI: 26.97 kg/m2

Height/Weight Not Obtained  
 Height/Weight Not Obtained: [ ] | Comments: [ ]

BMI Intervention  
 Education |  Referral |  Pharmacological Intervention  
 Dietary Supplements |  Exercise/Physical Activity Counseling |  Nutrition Counseling  
 BMI Comments: [ ]

Blood Pressure  
 Systolic: 180 | Diastolic: 60

Pulse  
 Pulse: 73 bpm

Respiratory  
 Respiratory: [ ]

- d. The Flow Sheet also includes key data points, such as smoking status, what smoking cessation interventions the client is on, a pain measurement, medication reconciliation, and fall risk assessment.
- e. When you've completed the vitals, **click Save**, then **click on the X** to close.

**New Entry Flow Sheet**

Abdominal Girth: [ ] In

Temperature  
 Temperature: 98.7 F | Temperature Location: Mouth

Smoking Status  
 Smoking Status: Never smoker | # Of Cigarettes Per Day: [ ] | Not collected due to: [ ]

Tobacco Use Intervention  
 Tobacco Use Cessation Counseling |  Tobacco Use Pharmacotherapy | Tobacco Use Comments: [ ]

Pain  
 Pain Level: [ ] | Pain Location: [ ]

Medication list reconciled  
 Medication list reconciled on this date

Fall Risk  
 Have you fallen in past year: No | Frequency of Falls: [ ] | Context of Fall: [ ]  
 Characteristics of Fall: [ ] | Balance and Gait observed: Yes

- f. This takes you back to the History and Physical, but now the vitals are included.



History and Physical

Effective 01/19/2023 Status In Progress Author Staff, Psychiatrist Sign

General History of Present Illness Medical History Diagnosis

Age: 20

Vitals

Open vitals flow sheet

Type	Item	01/19/2023 01:13 PM			
Height/Weight/BMI	Height	68.50 In			
	Weight	180.00 lb			
	BMI	26.97 kg/m2			
Blood Pressure	Systolic	180			
	Diastolic	60			
Pulse	Pulse	73 bpm			
Respiratory	Respiratory				
Abdominal Girth	Abdominal Girth				
Temperature	Temperature	98.7 F			
	Temperature Location	Mouth			

Chief Complaint

Chief complaint  
Patient presents for psychiatric evaluation for anxiety symptoms.

7. **Navigate to the History of Present Illness and complete this tab.** All sections will pre-populate to “Normal” or the section’s equivalent.
  - a. There is a body on which to designate location of issues. **Click on the body** to open the Skin Image Markup pop-up.

History and Physical

Effective 01/19/2023 Status In Progress Author Staff, Psychiatrist Sign

General **History of Present Illness** Medical History Diagnosis

Skin

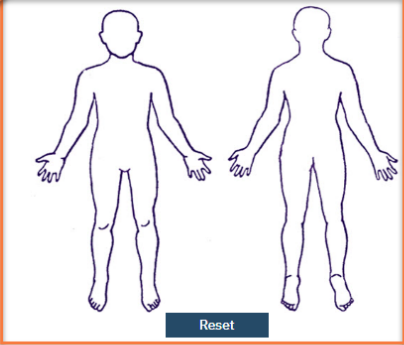
Normal-Skin warm,moist, No cuts, scrapes, No bruising petechial, No ecchymoses  
 Abnormal  
 Bruising, general  
 Cuts, general  
 Scrapes, general  
 Petechial, general  
 Rash, general  
 Other, general

HEENT  Normal

Head

Normal- The skull is normocephalic/atramatic  
 Abnormal  
 Positive Finding(s)

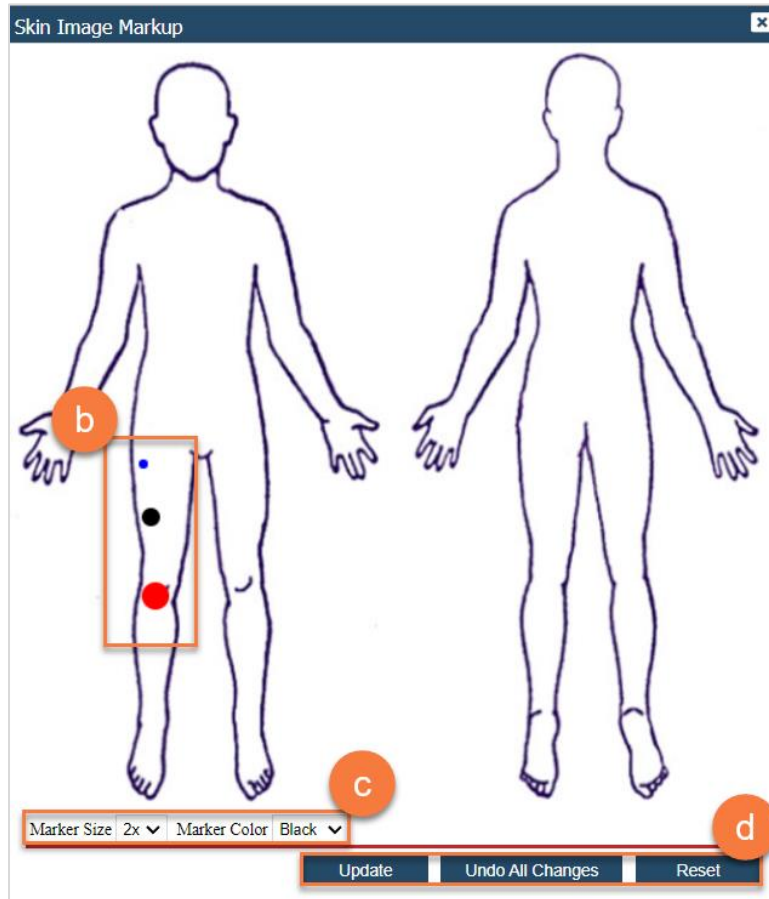
a



- b. **Click on the body** to create a dot at the location.



- c. You can change the color and size of the marker by selecting the options in the dropdown menus. The sizes shown below are: Blue = 1x, Black = 2x, Red = 3x.
- d. Use the buttons at the bottom of the pop-up to save what you've added (**click Update**), undo the changes you've made since opening this pop-up (click Undo All Changes), or erase all marks (click Reset),.



8. **Navigate to the Medical History tab and complete this screen.**

- a. Allergies will be automatically pulled from the Rx module. If you need to refresh this, click the "Get Current allergy list" button. To add allergies, see Allergies, Intolerances, Failed Trials.

History and Physical

Effective 01/19/2023 Status Progress Author Staff, Psychiatrist Sign

General History of Present Illness **Medical History** Diagnosis

**Allergies**

Allergies(Medication and Other) [Get Current allergy list from SmartCareRx](#)

None Reported

**Operations/Injuries**

Operations  None  Operation

<input type="checkbox"/> Abortion	<input type="checkbox"/> Amputation	<input type="checkbox"/> Appendectomy	<input type="checkbox"/> Arthroscopy
<input type="checkbox"/> Blepharoplasty	<input type="checkbox"/> Carpal Tunnel Release	<input type="checkbox"/> Cataracts	<input type="checkbox"/> Cholecystectomy
<input type="checkbox"/> Colectomy	<input type="checkbox"/> Cystoscopy	<input type="checkbox"/> Dilation and Curettage	<input type="checkbox"/> Hemorrhoidectomy
<input type="checkbox"/> Hernia Removal(Inguinal/umbilical)	<input type="checkbox"/> Hysterectomy	<input type="checkbox"/> Ileostomy	<input type="checkbox"/> Laminectomy
<input type="checkbox"/> Laparoscopy	<input type="checkbox"/> Lobectomy	<input type="checkbox"/> Lumbar Fusion	<input type="checkbox"/> Mastectomy
<input type="checkbox"/> Myringotomy Tubes	<input type="checkbox"/> Spinal Fusion	<input type="checkbox"/> Strabismus	<input type="checkbox"/> Thoracoscopy
<input type="checkbox"/> Thyroidectomy	<input type="checkbox"/> Tracheostomy	<input type="checkbox"/> Tonsillectomy and Adenoidectomy	<input type="checkbox"/> Other

b. This tab includes a pain assessment.

General History of Present Illness **Medical History** Diagnosis

**Pain**

Do you have conditions associated with pain?  Yes  No

Are you experiencing any pain right now?  Yes  No

If yes, is the client under a physician's care for pain management?  Yes  No

Recommended that client follow up with primary care physician.

Does the client experience any chronic untreated pain?  Yes  No

If yes, is the client under a physician's care for pain management?  Yes  No

Recommended that client follow up with primary care physician.

Comments

Have you had pain in the last 2 months?  Yes  No

Comments

**Family History**

Comments

- c. This tab also pulls medications and medication history from the Rx module. If you need to refresh this, click the “Get Current Medication List From SmartCare” button.
- d. You can also place orders directly from this screen by clicking on the “Place Order” button. However, any outpatient medication orders should be entered in the Rx module. See Creating a New Order (Prescription).

General History of Present Illness **Medical History** Diagnosis

**Current Medications**

None Reported

**Get Current Medication List From SmartCare** **Place Order**

Medication Name	Instruction	Prescriber	Last Ordered	Rx Start	Rx End Date
None Reported					

**Medication History**

Name (Dosage, Frequency), Prescribed By, Self Reported/Ordered Locally

None reported

e. This tab also includes a diet assessment.

General History of Present Illness **Medical History** Diagnosis

**Diet**

Diet:

N/A  Regular Low sodium  1800 calorie  1500 calorie

Vegetarian  Vegan  Non-concentrated sugars  Other

Food allergies

Food restrictions

Food preferences

Comments

f. At the end of this tab is a place to enter any Course of Action that needs to be taken.

General History of Present Illness **Medical History** Diagnosis

**Course Of Action**

Follow up as needed

Follow up with PCP after discharge-order on order sheet

Other

See order to follow up with PCP

Comments

9. If you need to update or add a diagnosis, **navigate to the Diagnosis tab**. This tab works the same as the standalone Diagnosis Document.
  - a. To add a diagnosis, **search for the diagnosis** by either the diagnosis code or by description. You can also select a favorite diagnosis from the dropdown list.

General History of Present Illness Medical History **Diagnosis**

No Diagnosis

**Diagnosis**

★

Code Search Description Search

Rule Out Type  Specifier

Severity  Source

Remission  Order 1 Billable  Yes  No

Comments

**Diagnosis List**

Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Description	SNOMED Description	Type	Severity	Source	Comments
No data to display									

b. Select the appropriate diagnosis from the search results.

**Diagnosis**

★

★ Code Search Description

Rule Out Type

Severity

Remission

Comments

**Diagnosis List**

Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Description	SNOMED Description	Type	Severity	Source	Comments
	Z59.0	Homelessness - 224229008		Sleeping out (finding)					
	Z59.0	Homelessness - 224231004		Sleeping in night shelter (finding)					
	Z59.0	Homelessness - 224232006		Sleeping at friends home (finding)					
	Z59.0	Homelessness - 224233001		Sleeping in vehicle (finding)					
	Z59.0	Homelessness - 266935003		Housing lack (finding)					
	Z59.0	Homelessness - 266940006		Lives in squat (finding)					
	Z59.0	Homelessness - 32911000		Homeless (finding)					
	Z59.0	Homelessness - 365510008		Finding of temporary shelter arrangements (finding)					

- Select the type of diagnosis, whether primary, additional, or provisional.
- If needed, you can also add severity, remission, or other specifiers. You can also check the “Rule Out” box if needed.
- Once completed, click **Insert**. This will push the diagnosis to the Diagnosis List area of the screen. You may repeat these steps to add more diagnoses.

General History of Present Illness Medical History **Diagnosis**

No Diagnosis

**Diagnosis**

★

Code  Search  Description  Search

Rule Out  Type  Specifier

Severity  Source

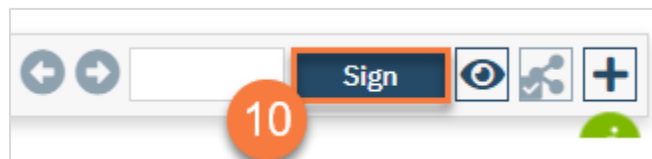
Remission  Order 1 Billable  Yes  No

Comments

**Diagnosis List**

Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Description	SNOMED Description	Type	Severity	Source	Comments
No data to display									

10. Once you've completed all tabs, **click Sign** to complete and generate the document.



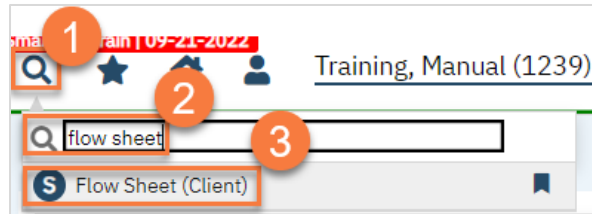
## Prescriber's Progress Note



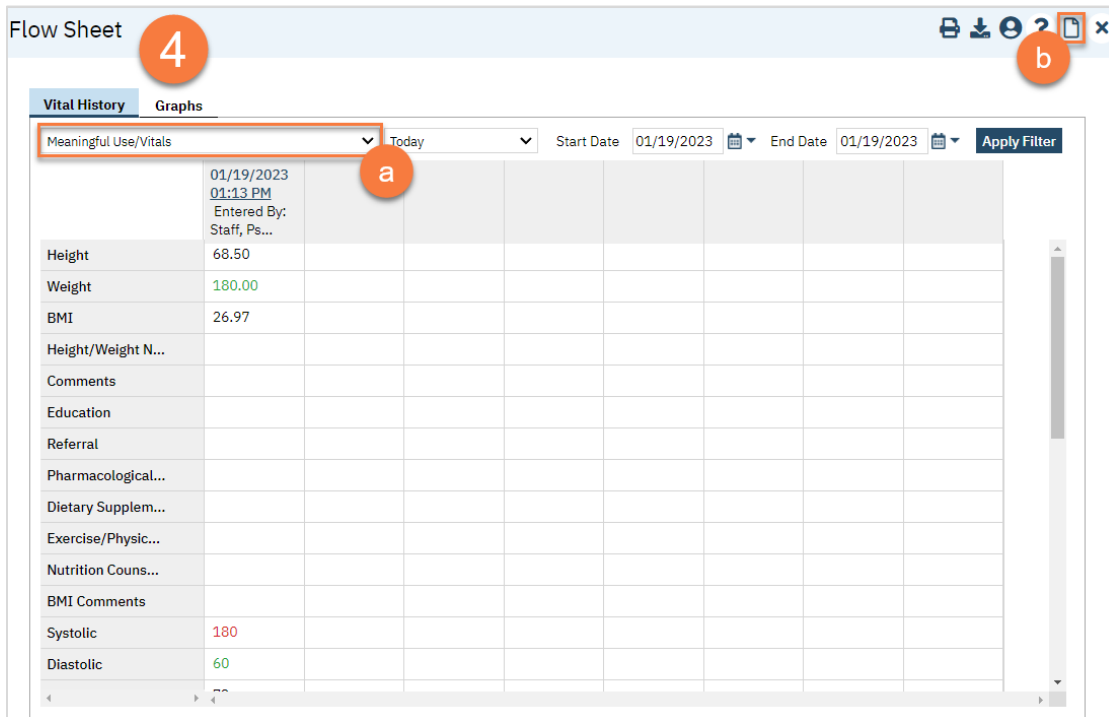
## Vitals & Flow Sheets

Vitals are completed through Flow Sheets.

1. You must first have the client open, then **click the Search icon**.
2. **Type "Flow Sheet"** into the search bar.
3. **Click to select "Flow Sheet (Client)"** from the search results.



4. The Flow Sheet screen opens. Any previously entered flow sheets will show here, with the most recent on the left.
  - a. You can **select the type of flow sheet from the dropdown**. For vitals, select Meaningful Use/Vitals.
  - b. To enter a new set of vitals, **click the New icon**.



- c. This takes you to the New Entry Flow Sheet. **Enter the vitals information that you have.**

**New Entry Flow Sheet** Save X

**Date/Time**  
 Select Date: 01/19/2023 Enter Time: 02:56 PM Program: Outpatient MH Adult-

**Height/Weight/BMI**  
 Height: 98.50 In Weight: 181.00 lb BMI: 13.11 kg/m2

**Height/Weight Not Obtained**  
 Height/Weight Not Obtained: [dropdown] Comments: [text box]

**BMI Intervention**  
 Education  Referral  Pharmacological Intervention  
 Dietary Supplements  Exercise/Physical Activity Counseling  Nutrition Counseling  
 BMI Comments: [text box]

**Blood Pressure**  
 Systolic: 178 Diastolic: 56

**Pulse**  
 Pulse: 70 bpm

- d. The Flow Sheet also includes key data points, such as smoking status, what smoking cessation interventions the client is on, a pain measurement, medication reconciliation, and fall risk assessment.
- e. When you've completed the vitals, **click Save**, then **click on the X** to close.

**New Entry Flow Sheet** Save X

Abdominal Girth: [text box] In

**Temperature**  
 Temperature: 98.7 F Temperature Location: Mouth

**Smoking Status**  
 Smoking Status: Never smoker # Of Cigarettes Per Day: [text box] Not collected due to: [dropdown]

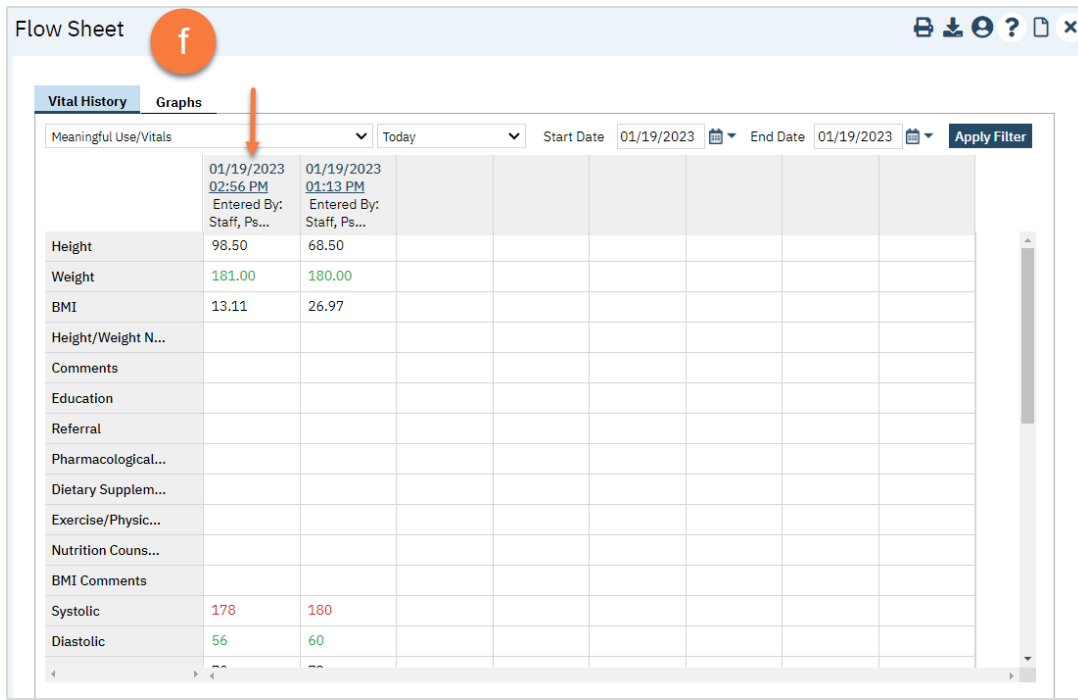
**Tobacco Use Intervention**  
 Tobacco Use Cessation Counseling  Tobacco Use Pharmacotherapy Tobacco Use Comments: [text box]

**Pain**  
 Pain Level: [dropdown] Pain Location: [dropdown]

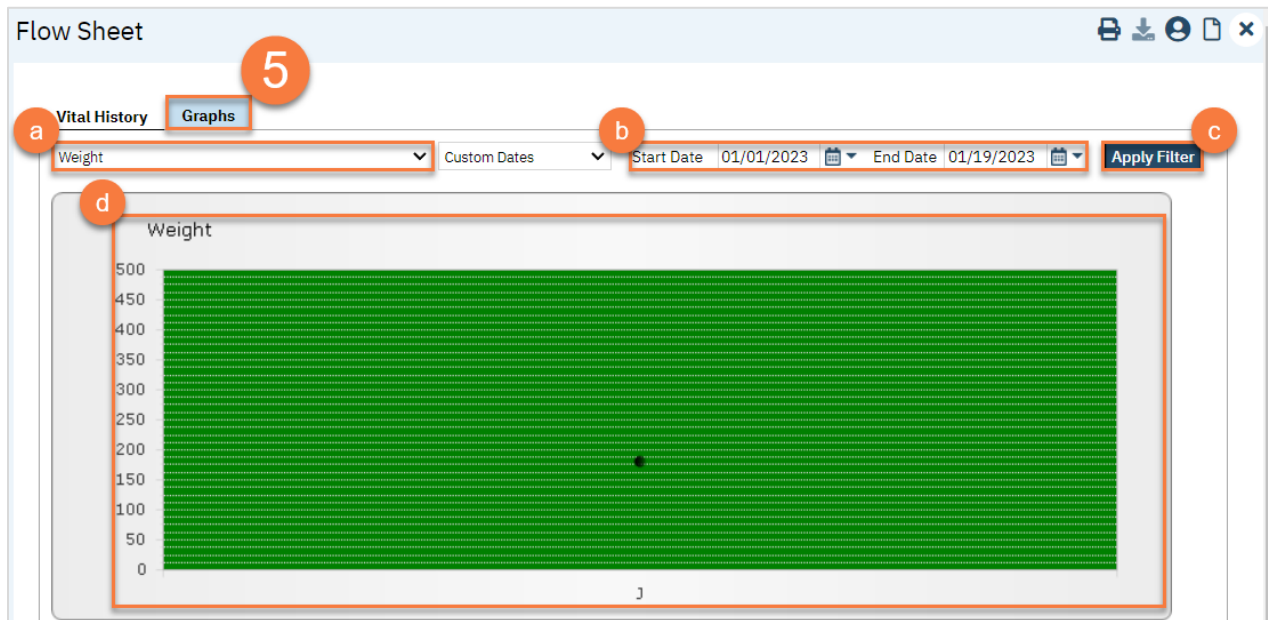
**Medication list reconciled**  
 Medication list reconciled on this date

**Fall Risk**  
 Have you fallen in past year: No Frequency of Falls: [text box] Context of Fall: [text box]  
 Characteristics of Fall: [text box] Balance and Gait observed: Yes

- f. This takes you back to the Flow Sheet screen, with your new set of vitals entered in the left-most section.



5. To see the data in graph form, **navigate to the Graphs tab.**
  - a. **Select your statistic** that you want to view.
  - b. **Select the dates** you want to view.
  - c. **Click the Apply Filter** button.
  - d. The graph will show in the bottom part of the screen and includes dates at the bottom in chronological order.





## Ordering Labs

