CalMHSA
California Mental Health Services Authority

Prescription Support Services
Clinical Documentation
Guide

Table of Contents

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

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

- 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:

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:

Please email: 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)**
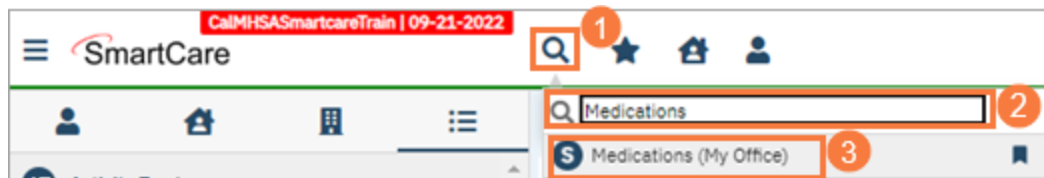
4. Rx Start page will open.
5. **Select Patient Search**
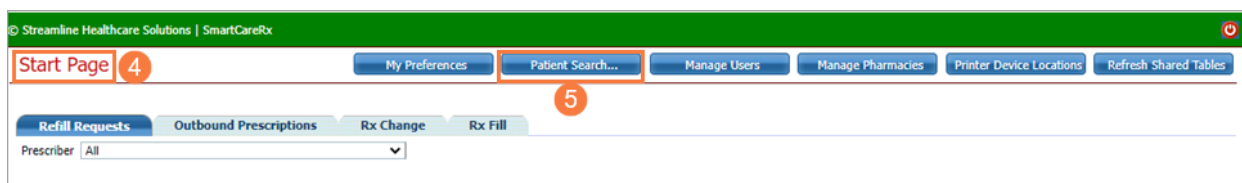
6. **Enter Last Name** or **First Name or Both**
7. **Enter Other Information** to narrow down search
8. **Select Narrow Search**
9. Locate and **Select Client**
10. **Click Select**
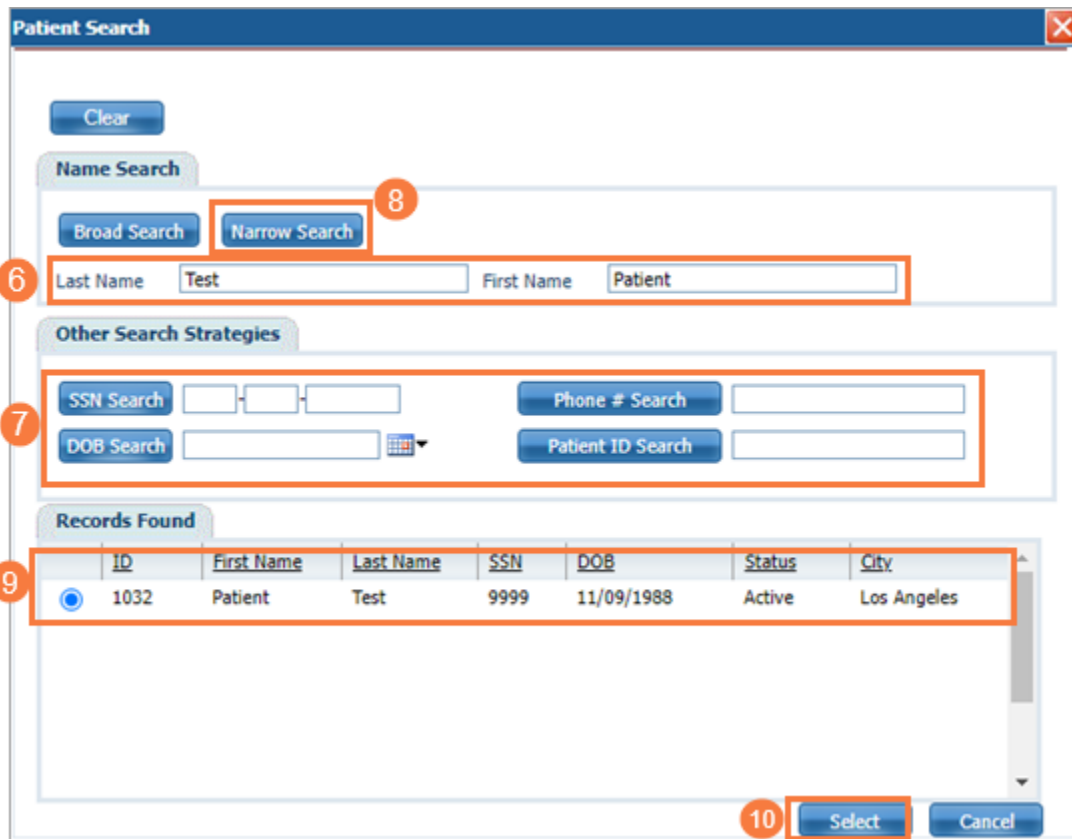
Patient Summary Screen should now display. Skip to 'Patient Summary Screen' or continue to second way of getting to Rx Screen.

Second Way: Patient Screen to Rx Screen

1. Select Client Search
2. Enter Client Name (Last Name, First Name)
3. Select Client
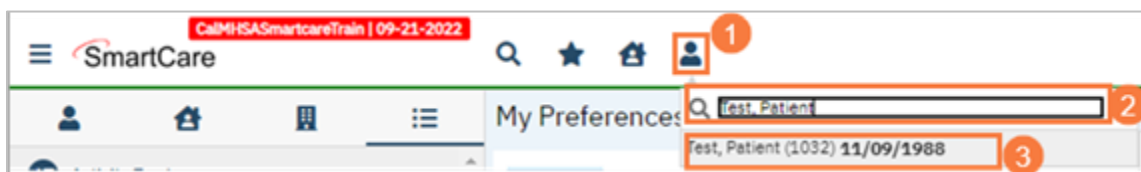
4. Clients **Name** should be visible.
5. Select Search
6. Enter Medication Management
7. Select Medication Management (Rx) (Client)
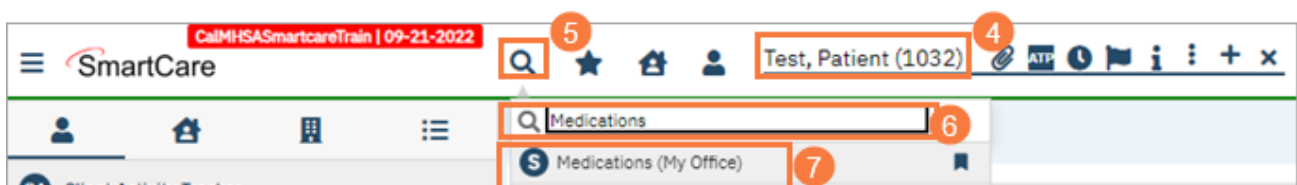
Patient Summary Screen should now display.

Patient Summary Screen

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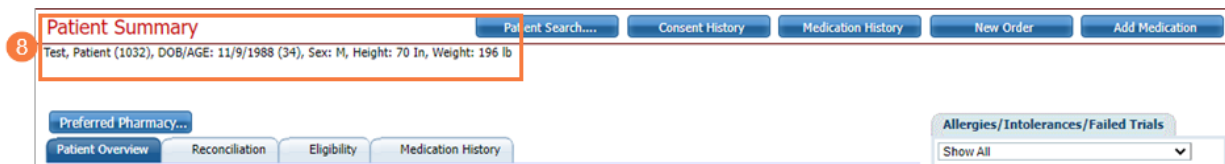
Rx: Patient Summary Screen

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

Main Components:
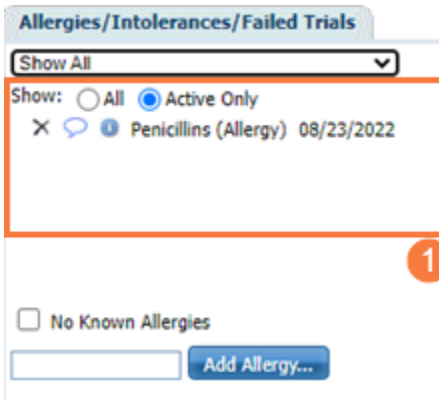
A. Displays patient information including name, DOB, primary insurance, and diagnosis.
B. Section to search for and save patient's preferred pharmacies.
C. Section where patient's current medications are listed and can be printed, changed, re-ordered, etc.
D. Section listing allergies and entering allergies. This can be done here or in SmartCare. The information pushes and pulls between the two.
E. Area to select and view consent history, medication history, place new orders, add medications from outside, and search for new patients to display.
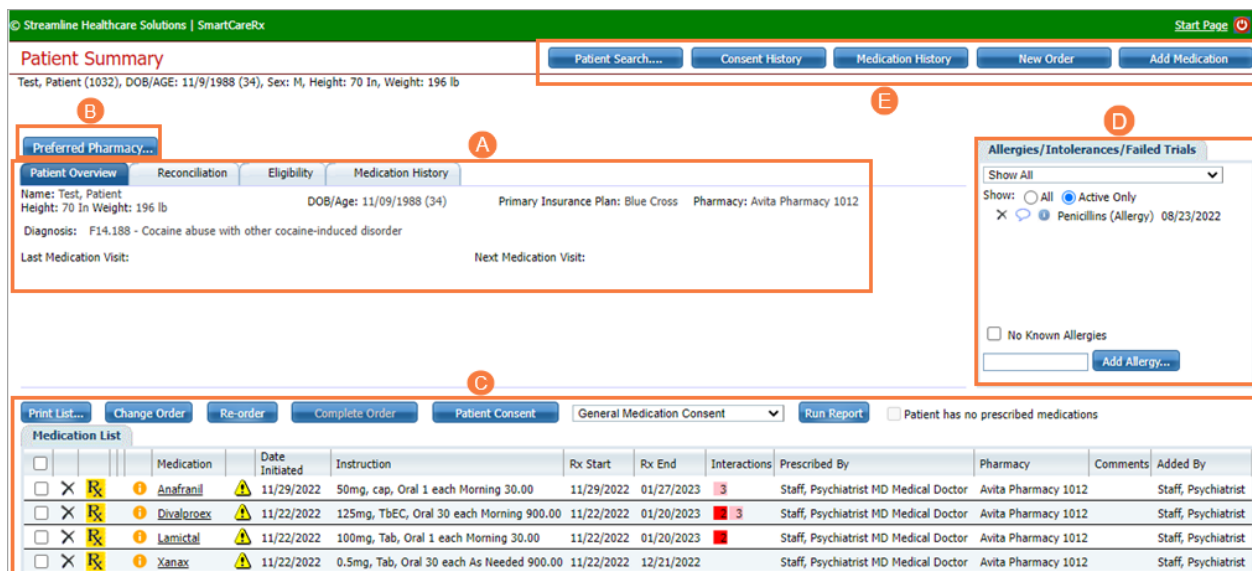
Allergies, Intolerances, Failed Trials
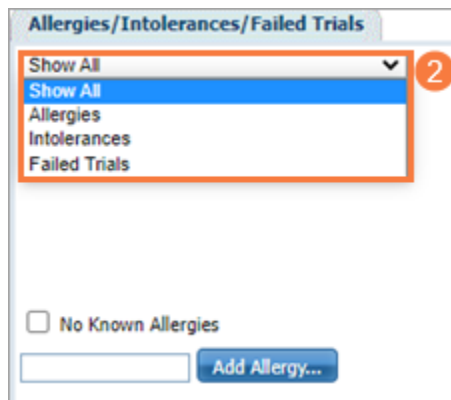
This section pulls in any allergies entered in SmartCare or entered directly here for the patient. Any allergy information entered here gets pushed back to SmartCare. This is also where you can add and see medications that the client shows intolerance or ineffectiveness towards.

1. Sections showing current allergies, intolerances, and/or failed trials.
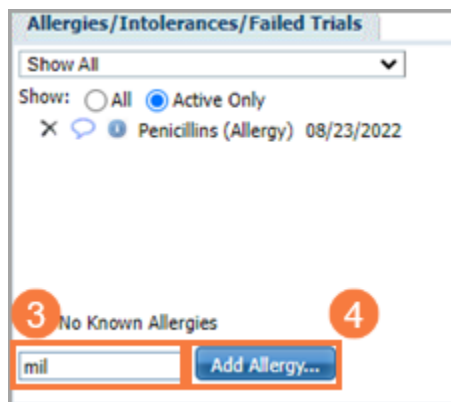
2. **Select drop-down** to **Show All, Allergies, Intolerances, or Failed Trials.**

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

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**

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**

Note: Both Milk and Milnacipran are now in the Allergy List
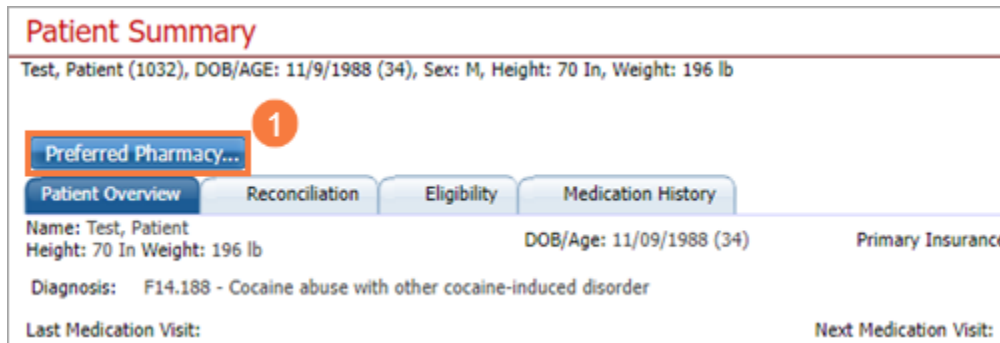
Adding Preferred Pharmacies
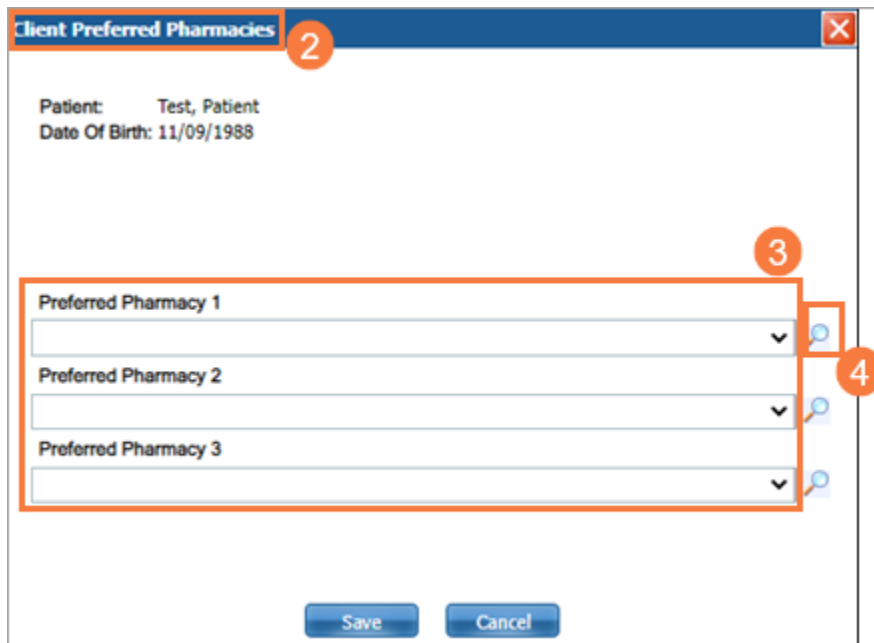
In this section we will show you how to add preferred pharmacies to make it quicker to select a pharmacy when prescribing medications. You can choose up to three pharmacies.

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

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.

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.**

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.**

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**

Medication Order Screen

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

<u>Sections</u>

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.

New Medication Order

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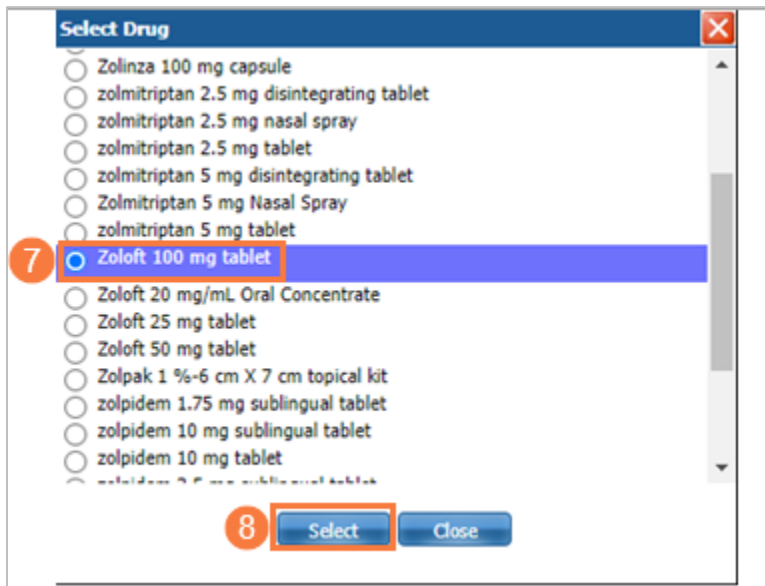
Medication should populate the screen like below. Once drug name is populated, the drop down becomes active and will show you other names, such as generic names, of the drug chosen.

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.

18. **Enter Dose**
19. **Select drop-down, choose unit if needed.**

20. **Select drop-down** and **choose directions.**

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.

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.

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.**

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.**

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.

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.

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

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.

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

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

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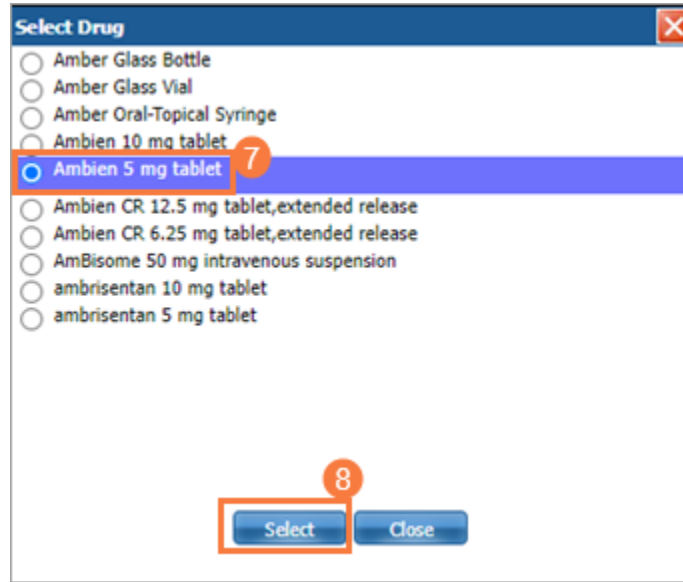
9. Enter any instruction text or desired outcomes if needed. It isn't required to save on medication list but it will show on MAR.
10. Adjust the strength, if necessary, enter the dose, direction, days, etc. as described to you.
11. **Select Insert.**
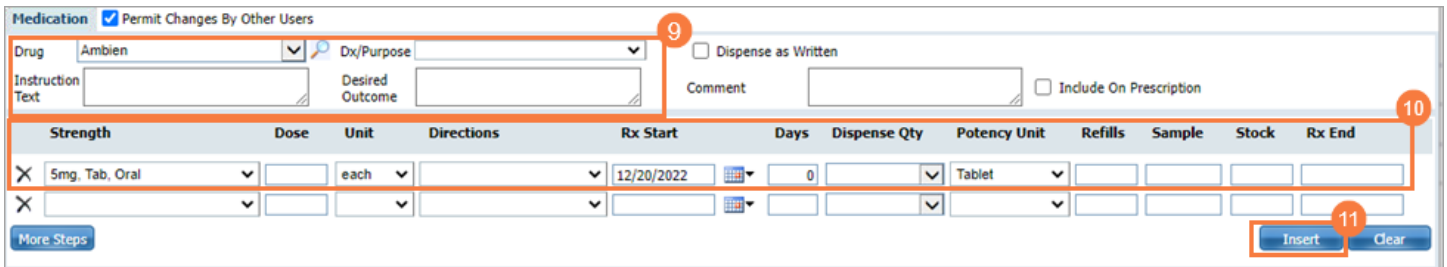
12. Verify drug in the list.
13. **Click Save.**

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

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.

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

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

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.**

○ Staff, Psychiatrist (Medical Staff)

● Test, Patient (Patient)

○ ---Select Relation--- ⌄ | Sign | Close

7. **Select Signature Method.** Input signature.
8. **Click Sign**

Get Signature

Get Signature

○ Password ○ Signature Pad ● Mouse/Touchpad ○ Verbally Agreed Over Phone ☐ Patient Signed Paper Document

Sign | Clear | Cancel

9. Both signatures should be visible if you scroll down to end of document.
10. **Click Close.**

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

				Medication		Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
☐	✕	℞	ⓘ	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
☐	✕	℞	ⓘ	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
☐	✕	℞	ⓘ	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
☐	✕	℞	ⓘ	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
☐	✕	℞	ⓘ	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

Take with food. Once a day.

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.**

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.

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.**

3. Re-Order screen should be open.

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

Discontinuing a Medication

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

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

2. **Click Yes** if you choose to discontinue the medication.

3. Enter Discontinue Reason screen should pop up.

4. **Select drop-down** to choose reason.

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

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
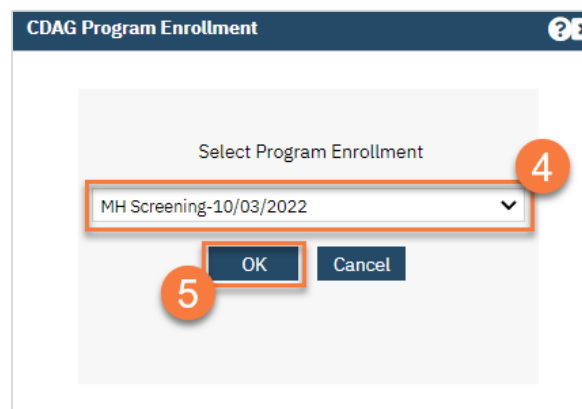
⚒ Under Construction ⚒

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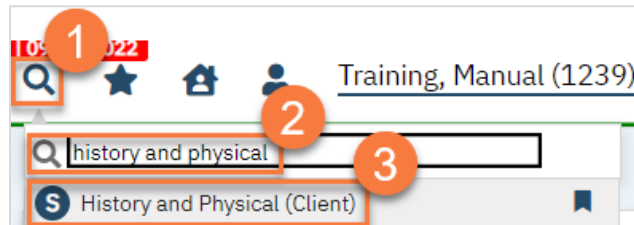
4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
5. **Click OK** to continue.

6. The History and Physical will open to the General tab. **Enter the chief complaint**.
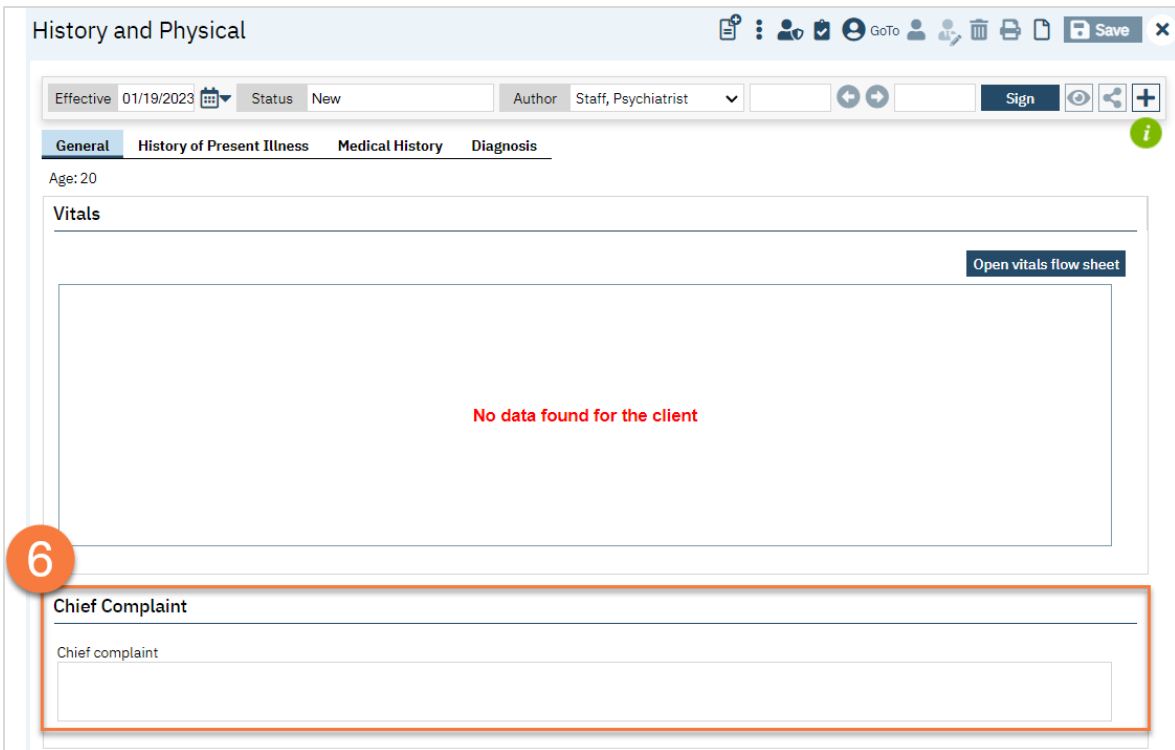
a. If you want to add vitals, **click Save**.

b. Then **click on the "Open vitals flow sheet" button**.
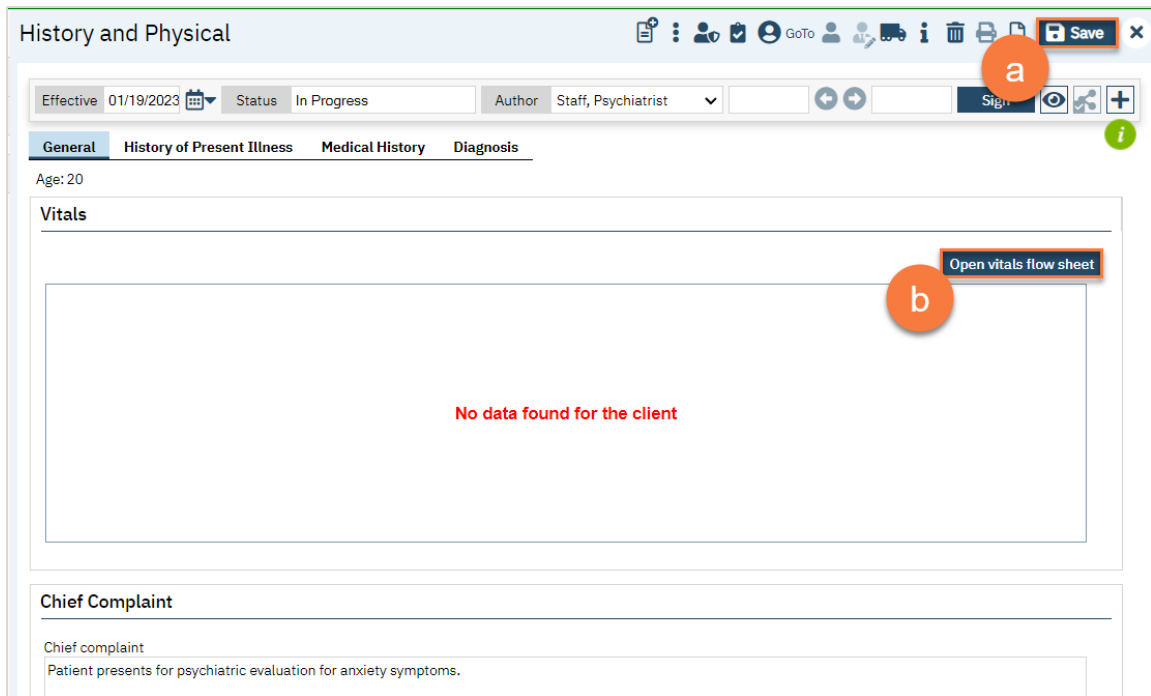
c. This brings you to the New Entry Flow Sheets screen. **Enter the vitals information that you have**.

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.

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

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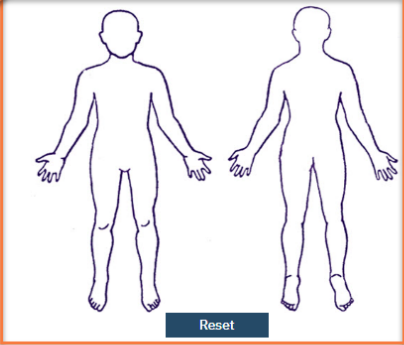
   a. There is a body on which to designate location of issues. **Click on the body** to open the Skin Image Markup pop-up.


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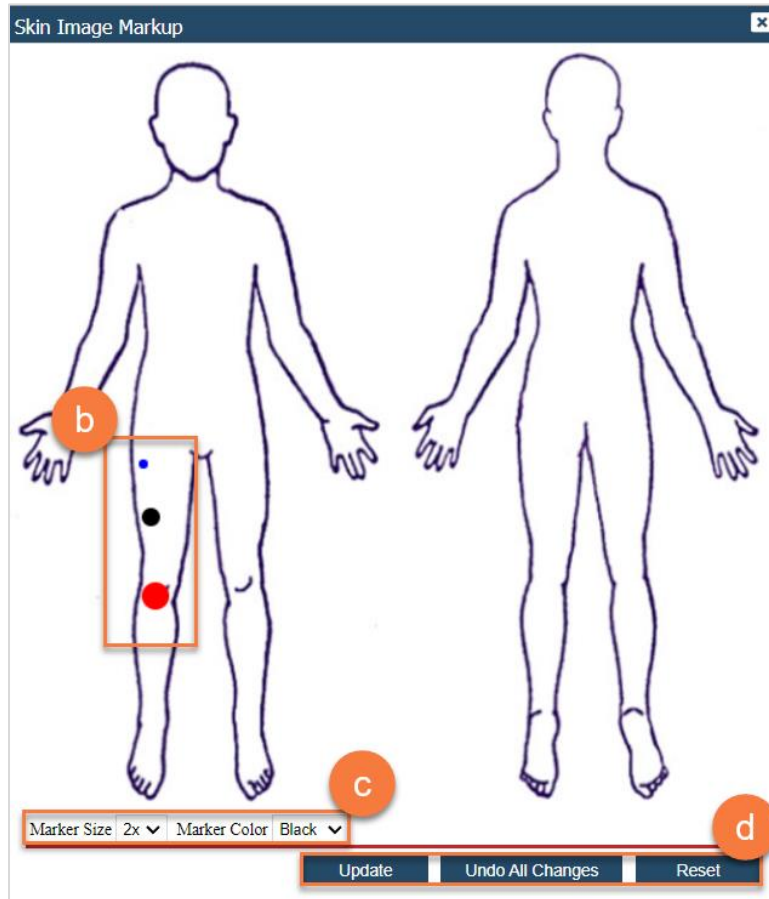
8. **Navigate to the Medical History tab and complete this screen.**

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.

b.   This tab includes a pain assessment.

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).

e. This tab also includes a diet assessment.

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

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.

b. **Select the appropriate diagnosis** from the search results.

c. **Select the type of diagnosis**, whether primary, additional, or provisional.
d. If needed, you can also **add severity, remission, or other specifiers**. You can also check the "Rule Out" box if needed.
e. 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.

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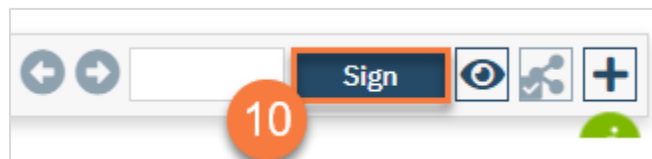
Prescriber's Progress Note

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Vitals & Flow Sheets

Vitals are completed through Flow Sheets.

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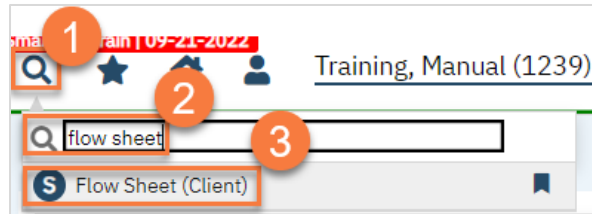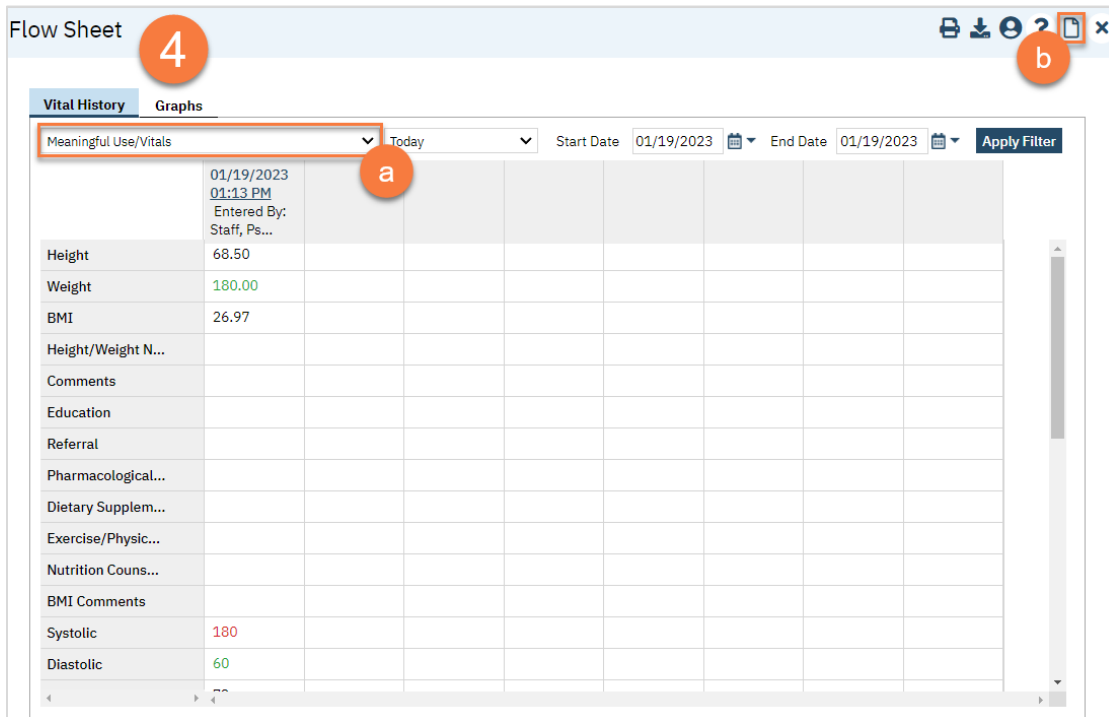2. **Type "Flow Sheet"** into the search bar.
3. **Click to select "Flow Sheet (Client)"** from the search results.

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.**

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.

f. This takes you back to the Flow Sheet screen, with your new set of vitals entered in the left-most section.
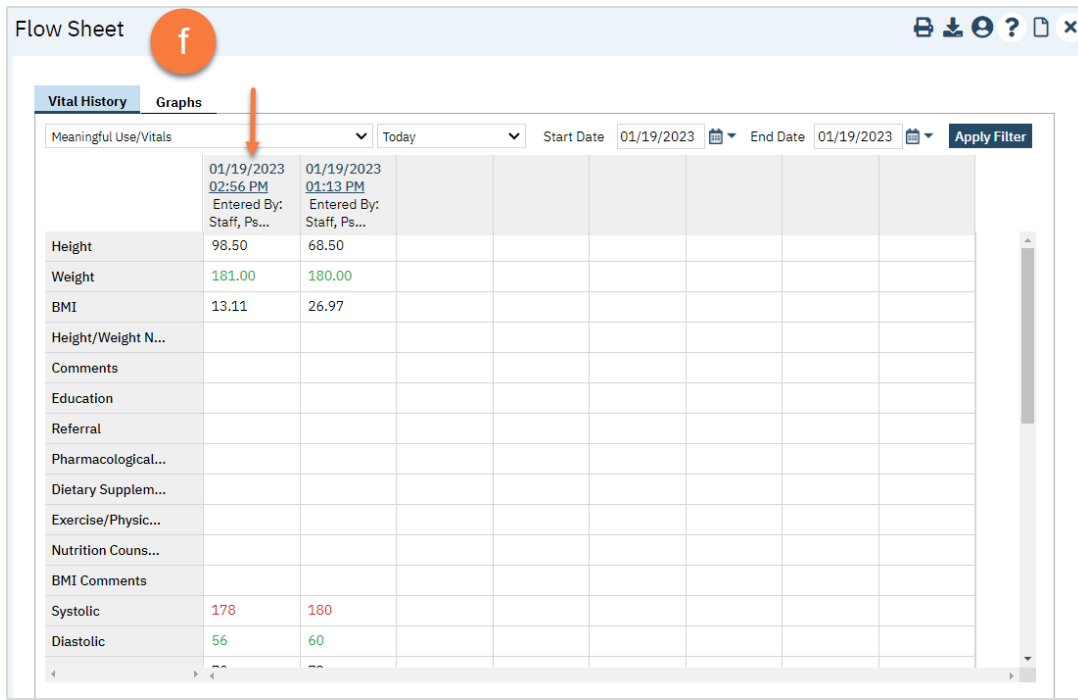
5. To see the data in graph form, **navigate to the Graphs tab**.
   a. **Select your statistic** that you want to view.
   b. **Select the dates** you want to view.
   c. **Click the Apply Filter button**.
   d. The graph will show in the bottom part of the screen and includes dates at the bottom in chronological order.

Ordering Labs

⚒ Under Construction ⚒