California Mental Health Services Authority

LMS EHR COURSE OFFERINGS: 4.13.23 COURSE PASSWORD: 03127

1. **BASIC NAVIGATION** | Audience: For Every SmartCare User | Time to Complete: 30 min
    a. This is an introductory course that covers the following topics:
        i. How to login for the First Time
        ii. What is the Home Page and What are the Functions of the Icons
        iii. What is a Screen vs. What is a document
        iv. What are Widgets
            - Tracking Widget
            - Appointments for the Day Widget
            - New Message/Alerts Widget
        v. List Pages
        vi. How to Search for a Client
        vii. What is the Client Dashboard
        viii. How to Search for Client Documents

2. **PRIVACY AND SECURITY IN SMARTCARE**| Audience: For Every SmartCare User |Time to Complete: 35 min
    a. This course covers how privacy and security is handled in SmartCare
        i. What is CDAG (Clinical Data Access Group)
        ii. What is the Coordinated Care Consent
        iii. What is the Release of Information
        iv. What Other Consents are in SmartCare

3. **MY CALENDAR MANAGEMENT FOR PROVIDERS** | Audience: All Direct Service Staff | Time to Complete: 25 min
    A. This course will walk you through how to manage your own appointments and calendar
        i. How to Create an Appointment from My Calendar
        ii. How to Reschedule a Client's Appointment
        iii. How to Cancel a Client's Appointment
        iv. How to Document a No-Show Appointment
        v. How to Schedule Non-Client Time on Your Calendar

4. **FRONT DESK SCHEDULING** | Audience: Front Office Staff | Time to Complete: 25 min
    a. This course will walk you through how to manage appointments and check-in clients
        i. How to Navigate the Staff Calendar
        ii. How to Use the Appointment Search Screen
        iii. How to Use the Reception/Front Office Screen
        iv. How to Manage Appointments

5. **PRESCRIPTION SUPPORT SERVICES|** Audience: All Staff Involved in Psychiatric Medication Support Services | Time to Complete: 60 min
    A. This course will walk you through the process of prescribing and managing medications.
        I. How to get to the Rx Module and General Overview
            - The Rx Module Start Page
        II. What is the Patient Summary Screen
        III. How to Document Allergies, Intolerances, and Failed Trials
        IV. How to Add a Preferred Pharmacy
        V. How to Create a New Prescription Order
        VI. How to Manage the Medication List
        VII. How to Add Medications Prescribed Elsewhere
        VIII. How to Document Patient Consent
        IX. How to Change, Re-Order to Stop a Medication
    B. The section of the course will walk you through the medical workflows in SmartCare
        I. How to Document the History and Physical Exam
        II. How to Document the Prescriber's Note
        III. How to Document the Vitals (Flow Sheets)
        IV. How to View and Order Labs
        V. How to be a Proxy for a Prescriber

6. **LIFE CYCLE OF A CLIENT: REQUESTS FOR SERVICES, SCREENING, AND INTAKE & ASSESSMENT|** Audience: All Clinical Staff | Time to Complete: 30 min
    a. This course will walk you through the first 3 stages in the life cycle of a client
        i. How to Document Requests for Services
            - The Inquiry Screen
        ii. How to Document the Screening Process
            - How to Document External Referrals
        iii. How to Document the Intake and Assessment
            - How to Add a Client to a Program
            - How to Add or Request Enrollment to a Program
        iv. Diagnosis Entry
            - How to Add a Diagnosis
            - How to Edit a Diagnosis
            - How to Favorite a Diagnosis
        v. Exceptions to the Process

7. **LIFE CYCLE OF A CLIENT: SERVICES|** Audience: All Clinical Staff | Time to Complete: 30 min
    a. This course will walk you through the 4th stage of the life cycle of a client and where the client spends the most time, in services.
        i. How to Document a Progress Note for a Scheduled Service
        ii. How to Document a Progress Note for an Unscheduled Service

iii. **How to Amend a Progress Note**
iv. **How to Enroll a Client into a Program**
v. **How to View and Edit a Client's Treatment Team**

8. **GROUP SET-UP AND DOCUMENTATION|** **Audience: All Clinical Staff | Time to Complete: 25 min**
   a. **In this course you will learn about how to set up the group and how to complete the group documentation.**
      i. **How to Set Up a Group**
      ii. **How to Make the Group Recurring**
      iii. **How to Document a Group Note**
         - **How to Document Individual Notes**
      iv. **How to Document Group Attendance**
      v. **How to Add or Remove Staff Members**
      vi. **How to Add or Remove Clients**

9. **LIFE CYCLE OF A CLIENT: DISCHARGE|** **Audience: All Clinical Staff | Time to Complete: 10 min**
   a. **This course will walk you through the 5th stage of the life cycle of a client, the process to discharge a client.**
      i. **How to Generate the Discharge Document**
      ii. **How to Generate the Summary of Care Document**
      iii. **How to Close the Client to a Program**