CalMHSA

California Mental Health Services Authority

Front Desk User 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

This manual is intended for use by anyone who will use the SmartCare EHR to support Specialty Mental Health Services or Substance Use Disorder clinical documentation.

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 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/

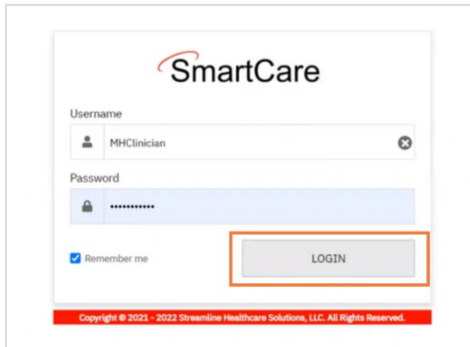
Note: Before beginning to use the same system, make sure you have a compatible internet browser like Microsoft Edge and Google Chrome. CalMHSA recommends Google Chrome for best user experience.

LMS Related Support:

Please email: moodle@calmhsa.org

Logging in to SmartCare

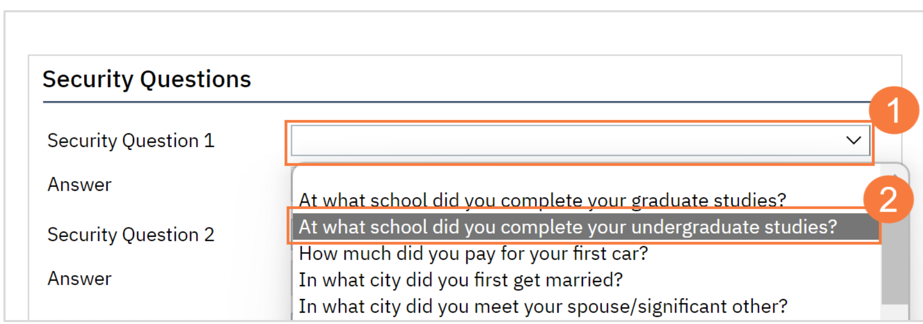
1. From the desktop, open your internet browser
2. Enter the SmartCare URL
3. Enter your username and password
4. **Click Login**



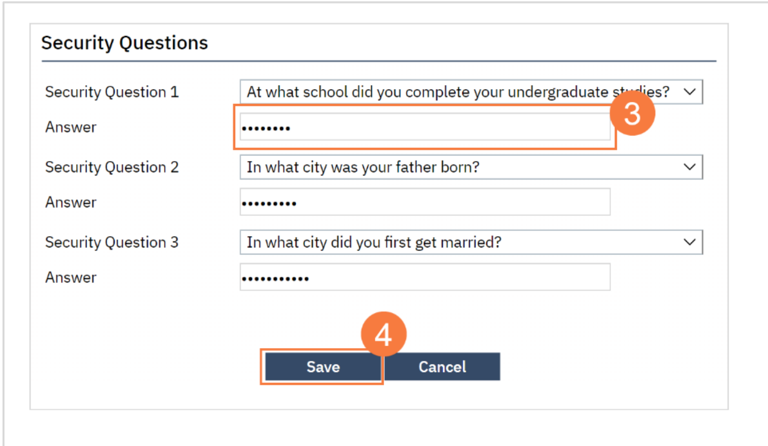
First Time User Login Process

When you first login you will have to set up 3 security questions.

1. **Click the drop-down menu** next to each security question
2. **Click to select** the security question you want to use

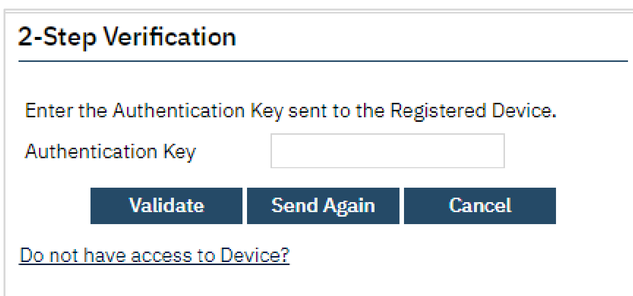


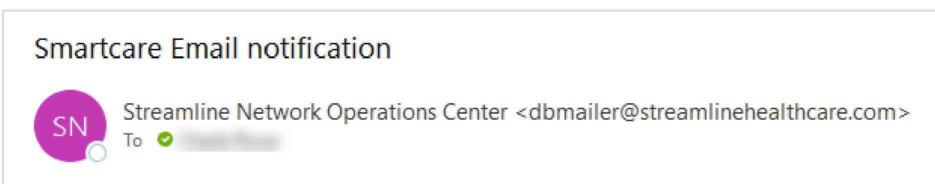
3. In the Answer field, **type the answer** to your chosen security question
    a. Repeat this for the remaining two questions
4. **Click Save**



Subsequent Logins

SmartCare uses multi-factor authentication, or MFA. This means that when you log in, you'll receive an email with a code that you'll need to enter. Your system administrator will set up how often this needs to happen.





Basic Navigation and Functionality

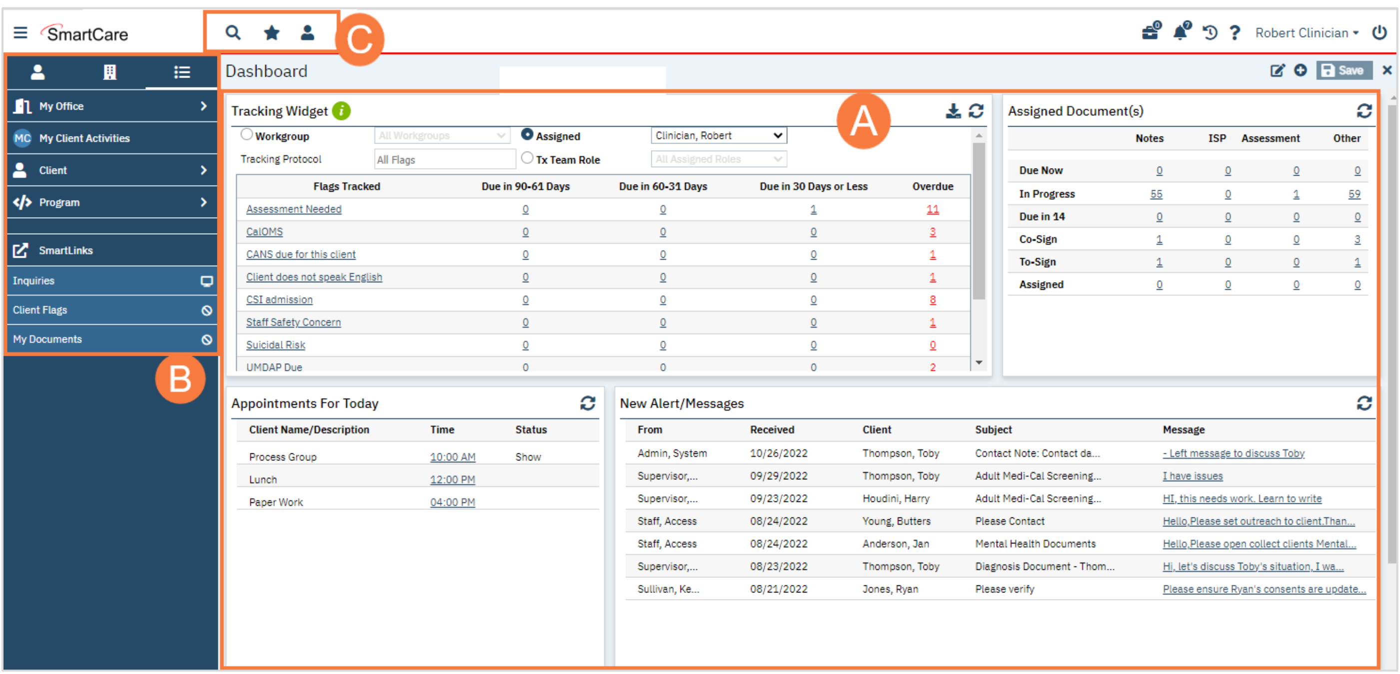
This section will cover basic SmartCare functionality, terminology, and navigation.

Home Screen

When you first login to SmartCare you will land on the Home Screen. You will have a home screen unique to your role to make it easier to navigate to the work that applies to you.

The Home Screen consist of 3 main components:

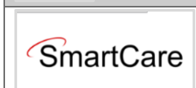
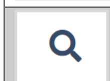
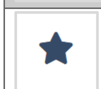
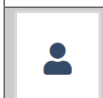
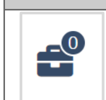
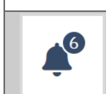
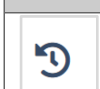
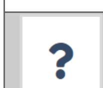
A. The Work Area
B. The Menu Bars
C. The Search Bar



Icons

The **Header,** pictured below, consists of several icons.

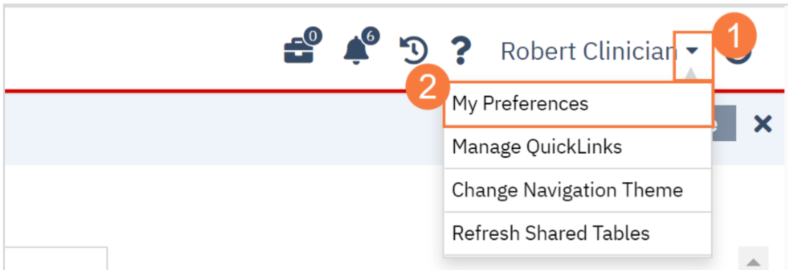
The **Icons and Functionality** table below describes each icon.

Icons and Functionality	
	The **Menu icon** will open and close the Navigation Filters bar
	Clicking on the **SmartCare icon** will bring you back to your Home Page
	The **Search icon** will allow you to quickly search for screens and list pages within SmartCare
	The **Favorite icon** will allow you to search for screens and list pages that you have save in your favorites
	The **Person Search icon** will allow you to search for a client by their name or ID number
	The **Unsaved Changes icon** will display a list of screens that you made changes to but navigated away from before saving
	The **Notification icon** will display a list of system notifications. The number that appears in the icon correlates to the number of notifications you have
	The **History icon** will open a window that displays the last 13 patients and QuickLinks you have accessed in your current session
	The **Help icon**, will take you to the SmartCare Online Help webpage
	The **Logout icon** will log you out of SmartCare

Preferences

In order to access your user preferences, follow the steps below:

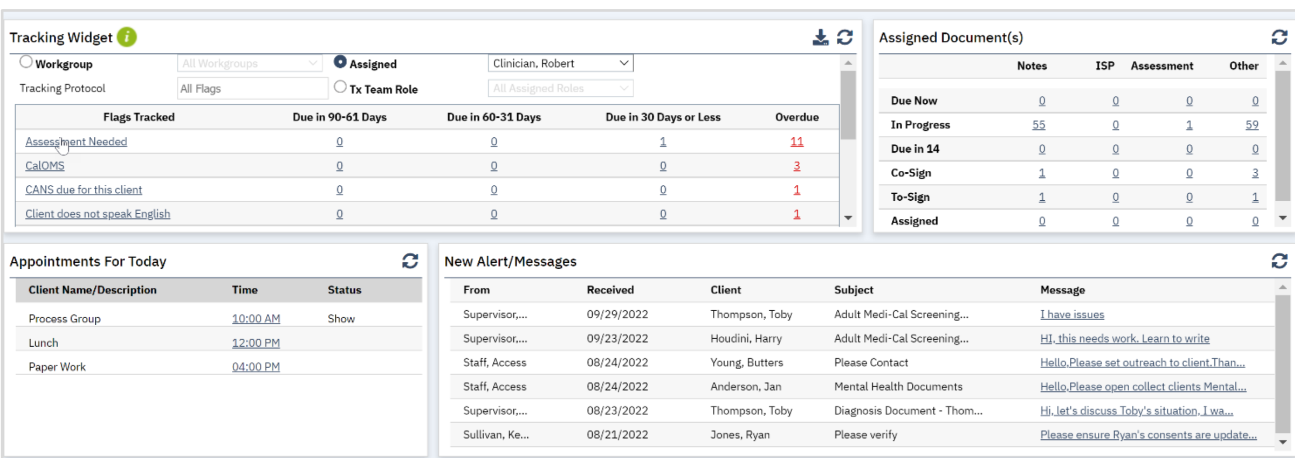
1. From the Header, **click the drop-down menu after your name** in the upper right-hand side.
2. A menu will open, **select Preferences** from the menu options



Note: Your preferences window will open, here you will be able to update your password, contact information, security questions, push notifications, etc.

Widgets

SmartCare has widgets that are multi-functional and interactive. They allow you to see and act on information most relevant to your role and daily tasks. The widget will appear on your Home Screen when you first login.



The Tracking Widget

The Tracking widget is a tool that shows you any documents or tasks that you need to complete. You can scroll down on the widget to view all tasks and documents that are due. Each document or task is hyperlinked to take you to the "To Do List" so you can complete it. The Tracking widget will default to you as the user, but you can switch to view your items by *Workgroup* or by *Treatment Team Role* if you are in a supervisor.

Tasks are grouped into 4 categories for easy prioritizing,

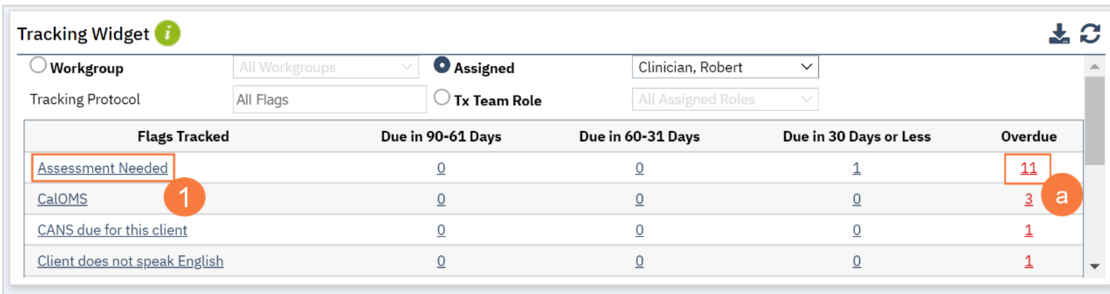
- Due in 90-61 Days
- Due in 60-31 Days
- Due in 30 Days or Less

- Overdue

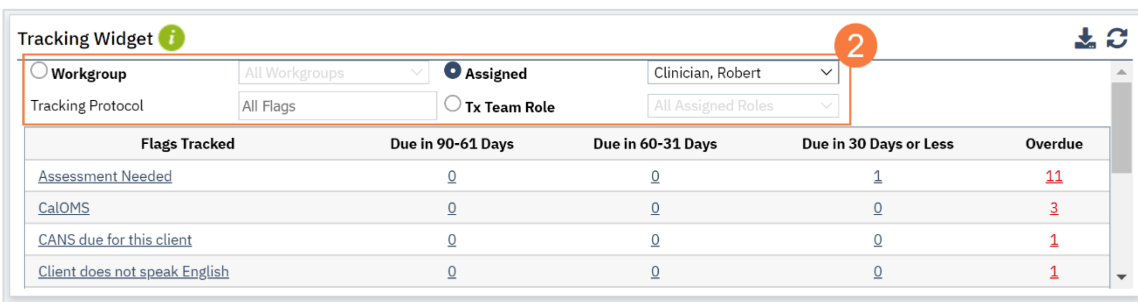
If a document doesn't have a due date, but hasn't been completed, it will show

Note: Clicking on the hyperlinked number will take you only to the tasks or documents that are due within that time category. Clicking on the task or document hyperlinked name will take you to all tasks in that category. To use the Tracking widget, follow the steps below:

1. **Click the hyperlinked name** of the task or document.
   a. You can also **click the hyperlinked number**.

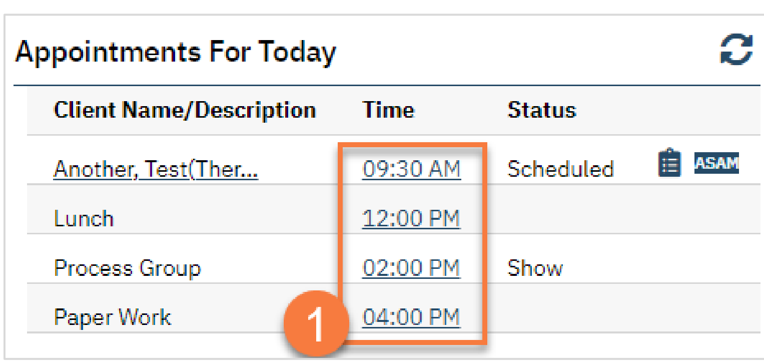


2. For Supervisors, you can change between Workgroup, Assigned, and Tx Team Role by clicking on the radio button to the corresponding field.

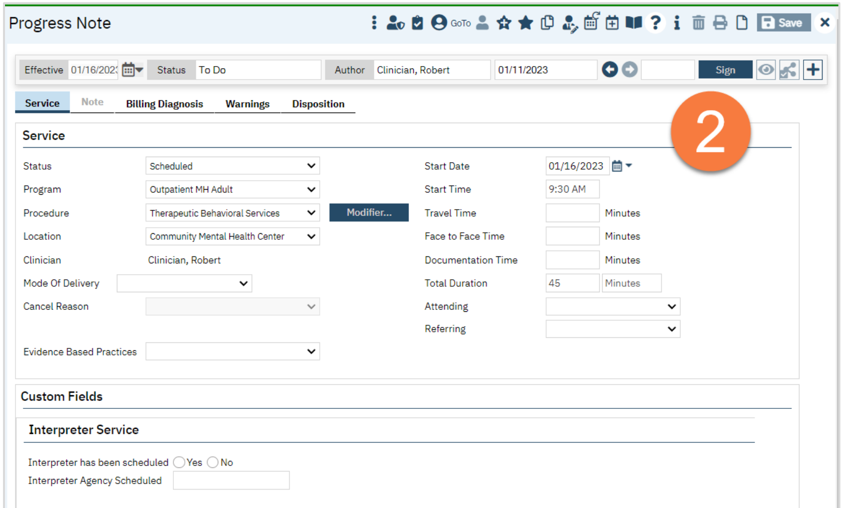


The Appointments For Today Widget

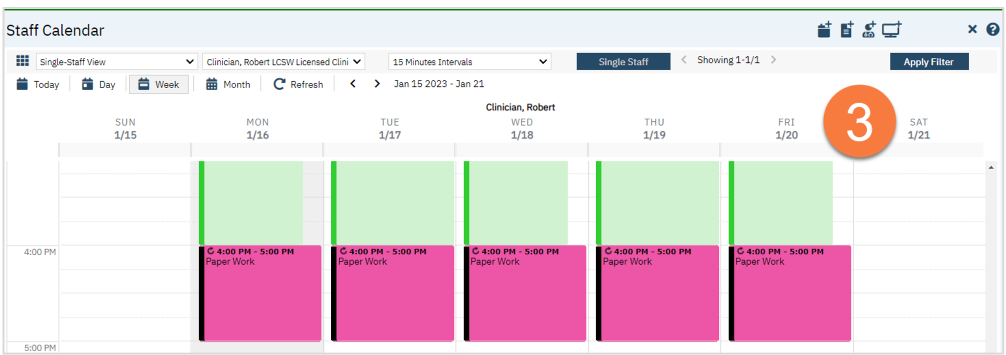
1. This widget allows you to see your daily schedule at a glance. This includes non-client time, such as meetings and time off, as well as client appointments. Clicking on the link will take you to that appointment.



2. For client service appointments, this link will take you to the service details, where you can quickly write a note.

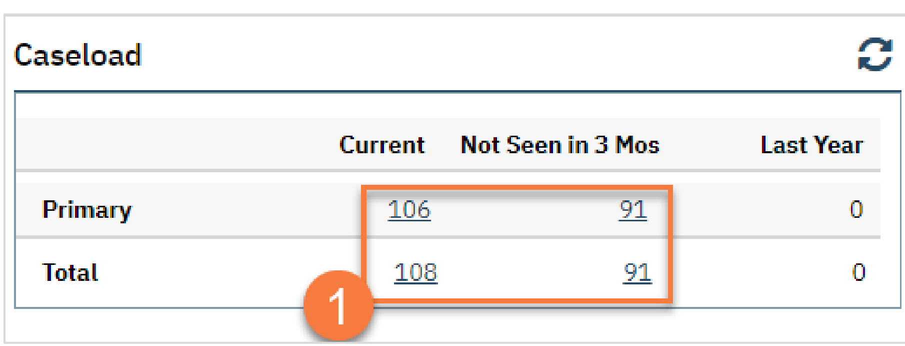


3. For non-client appointments, like meetings, this link will take you to the Staff Calendar.

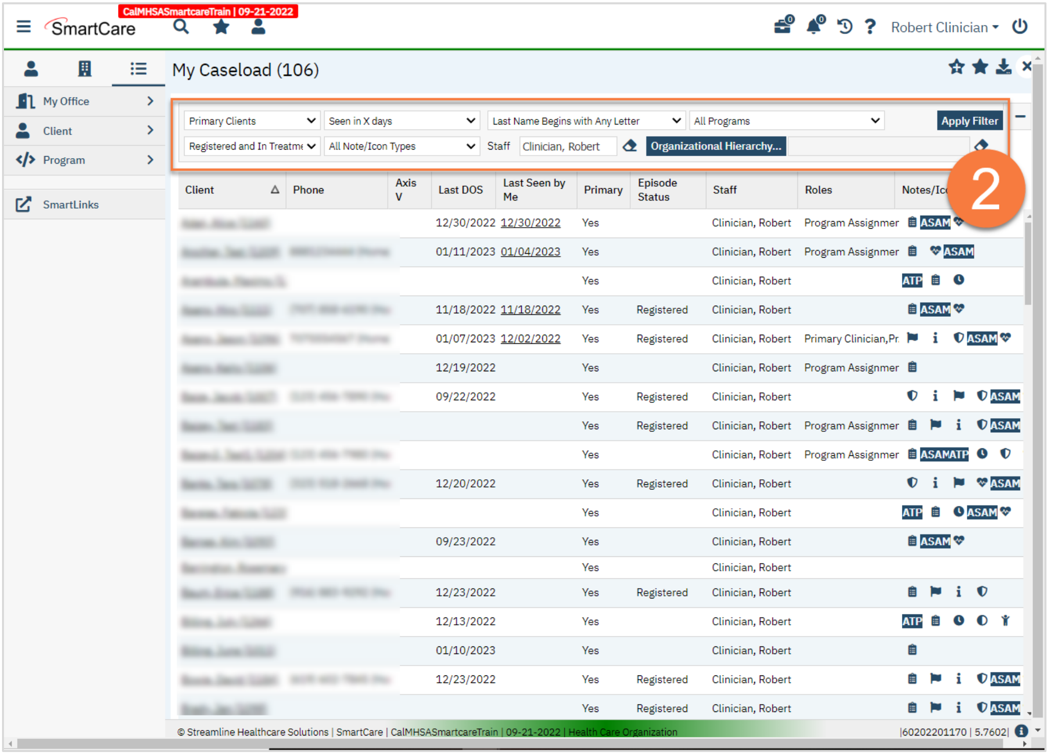


The Caseload Widget

1. This widget allows you to easily see your caseload. Clicking on any of the links will take you to the My Caseload list page.

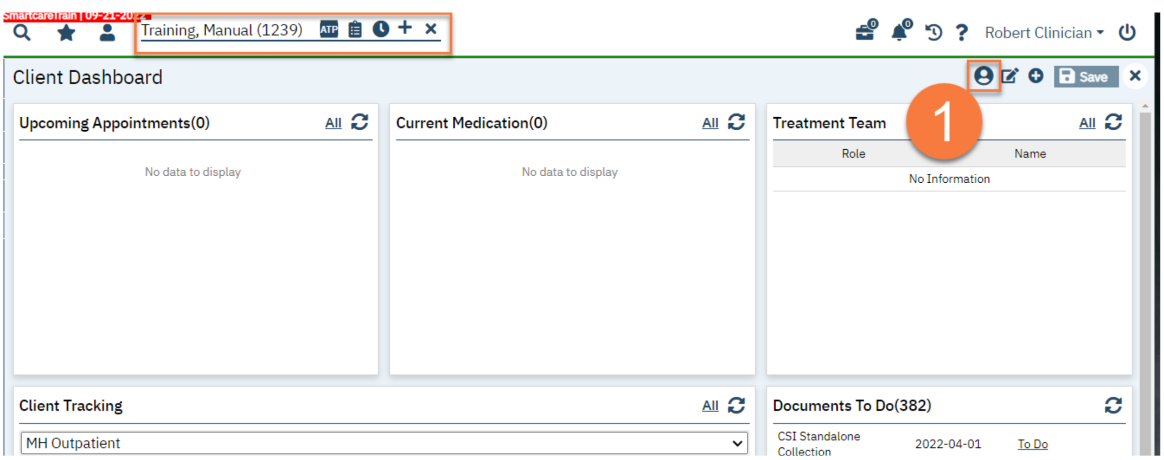


2. Just like any list page, you can use the filters at the top of the page to narrow the results as needed. Depending on the link you clicked from your dashboard, some filters may already be in place.

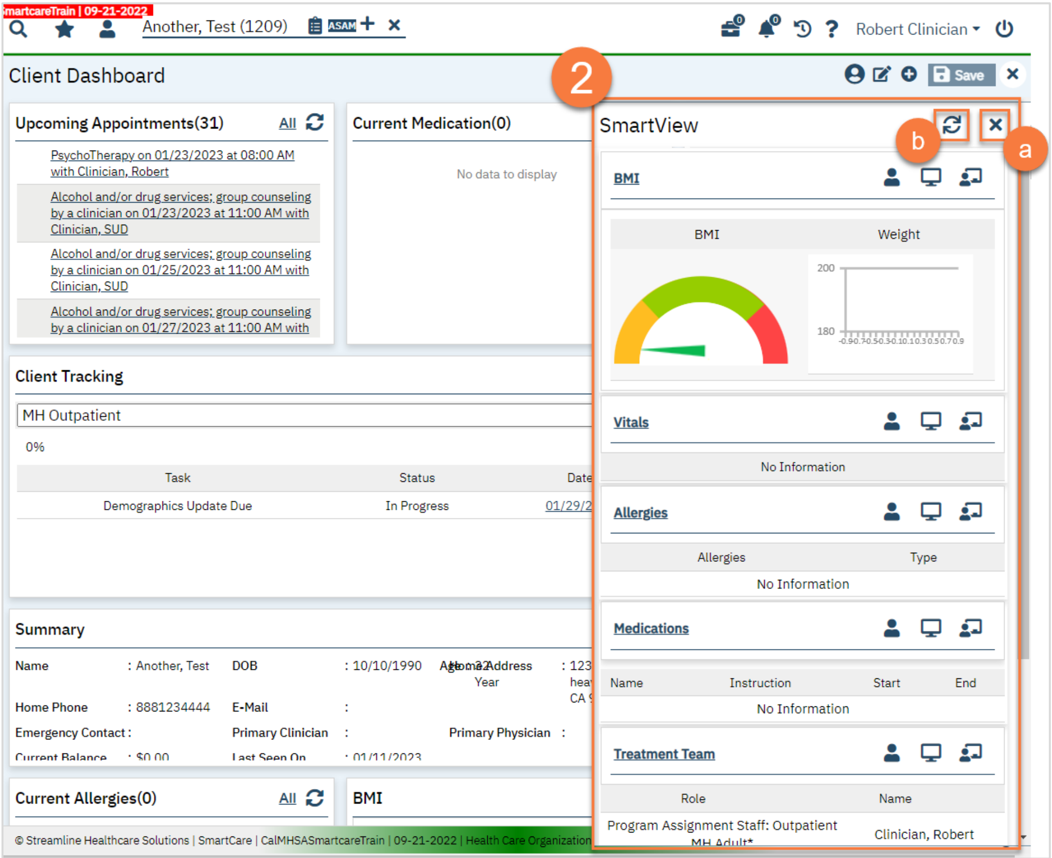


The SmartView

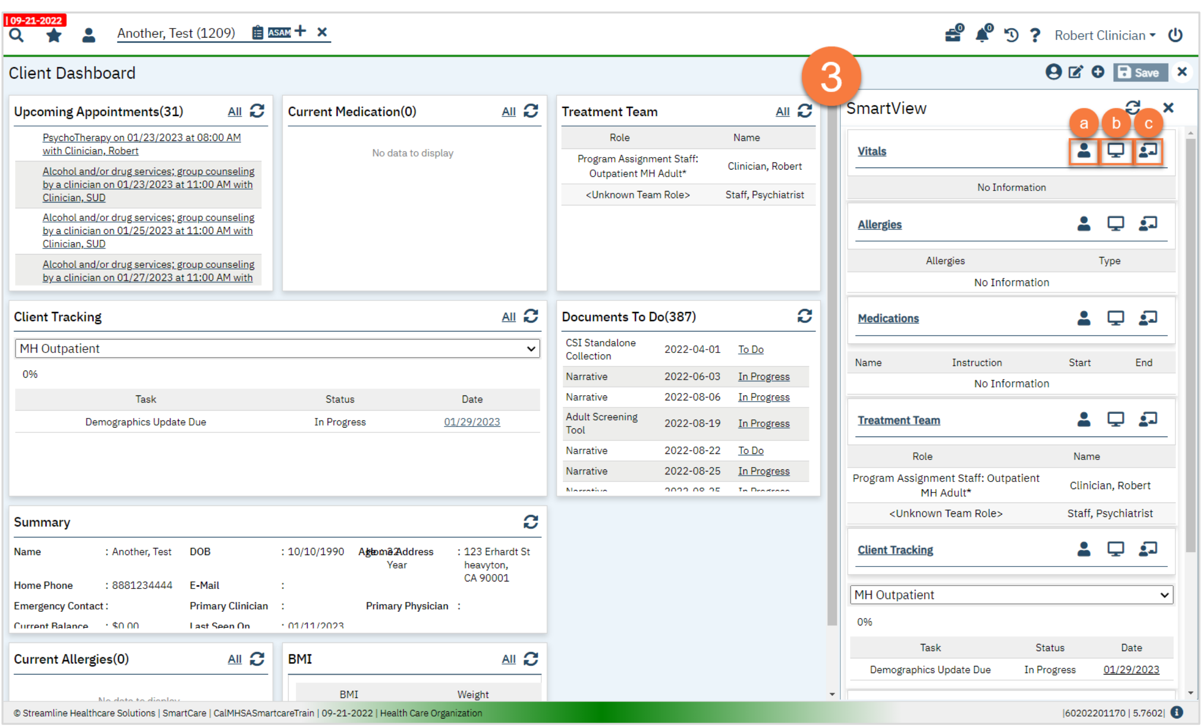
1. When you have the client open, click on the SmartView icon in the upper right corner of the screen.



2. This opens up the SmartView side panel. This will remain open while you navigate the client's chart. The SmartView widgets include links that will take you to the related screen.
    a. To hide this, click the X in the upper-right.
    b. To refresh the information on the SmartView widgets, click the Refresh icon.



3. You can pin the SmartView so that it's not overlapping the other parts of the screen. The below screenshot shows the pinned version. You can select 1 of 3 options for pinning the screen:
   a. Pin to the client – will always be pinned when opening this client.
   b. Pin to the screen – will always be pinned when on this screen.
   c. Pin to the screen and the client – both a & b.



Screens vs. Document

Screens are forms that, when updated, only show the most recent information. Documents, on the other hand, will save the finalized version in a pdf in order to capture data at a point-in-time.

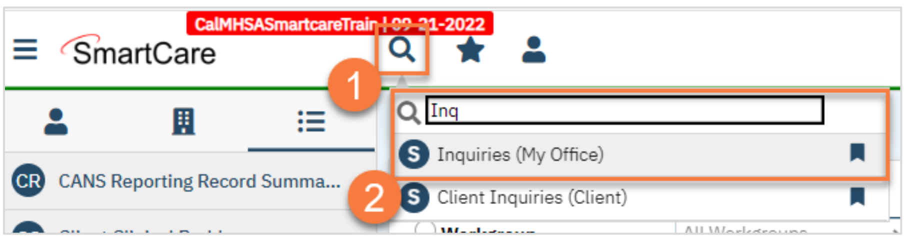
Life Cycle of the Client: Request for Services

There are many methods used to initialize services, but all start with some sort of request for services. This section will go into how to document these types of requests and how to move a client through the initialization process. Each county has an Access Line that's available 24/7 for people to call for information about services and to request services. Each county also has a Crisis Line that's available 24/7 for people to call when they're in crisis. Some counties may have walk-in clinics where a person can simply drop-in and request an assessment. Sometimes people requesting services may call another behavioral health phone number or walk into an office that doesn't provide screening, assessment, or crisis services and they need to be redirected. We'll cover all of these scenarios in this section.

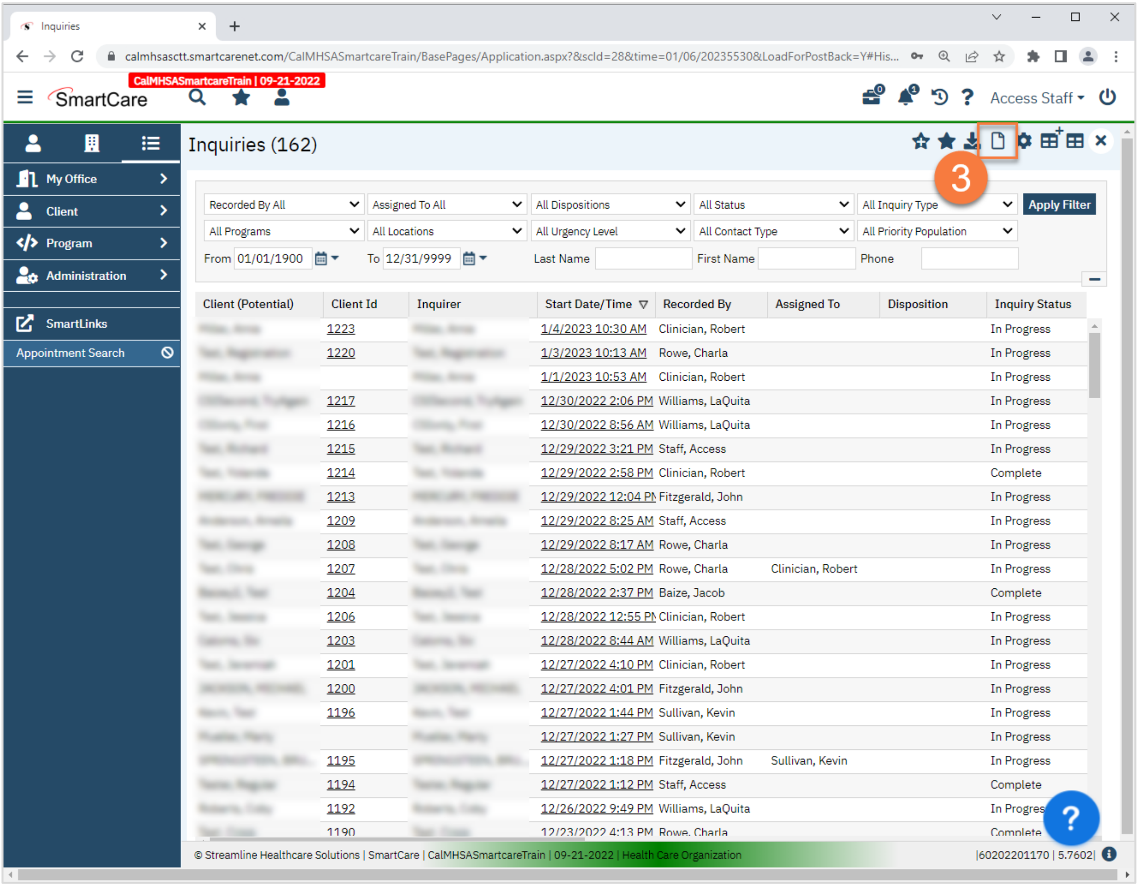
How do I document a request for services received via the Access Line?

Access Line calls are documented on the Inquiry screen.

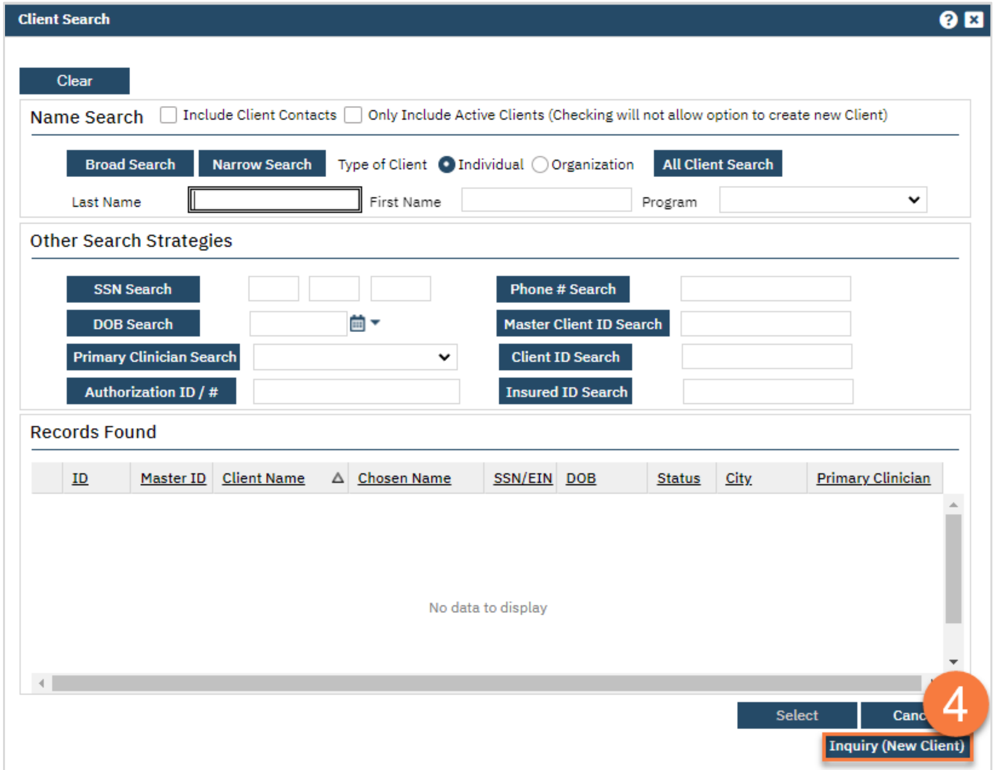
1. **Search for the Inquiry screen** using the search icon.
2. **Select "Inquiries (My Office)"**



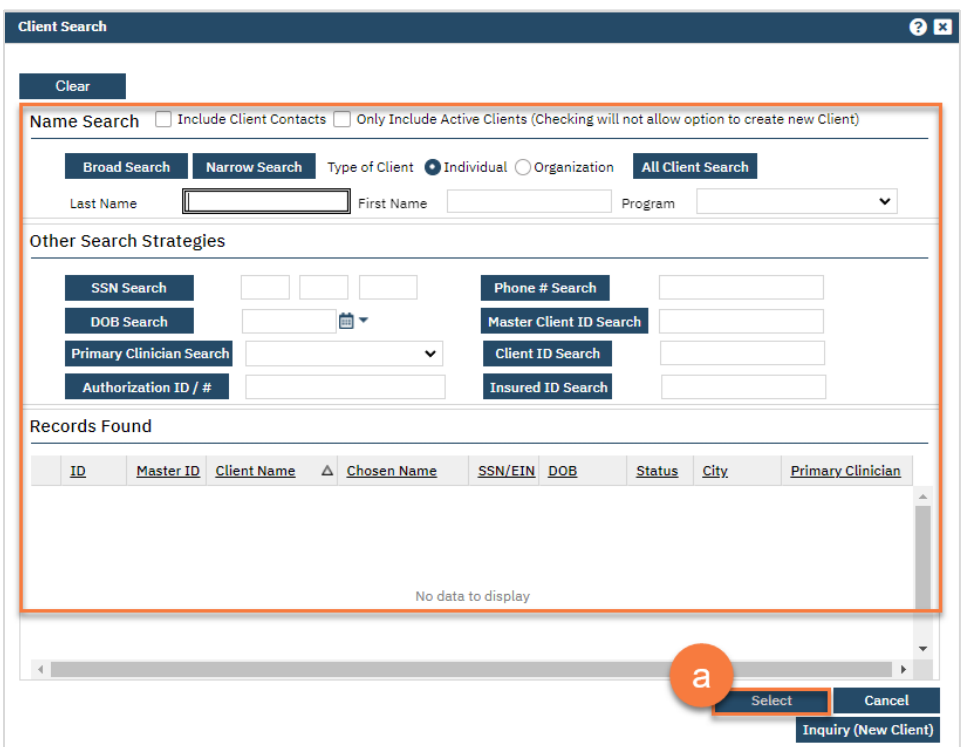
3. This will bring you to the Inquiries list page. **Create a new inquiry** by using the new icon.



4. This will bring up the client search window. **You may search to determine if the person is a current client**. If person is a new client, or you cannot find them in the system, **click "Inquiry (New Client)"**.

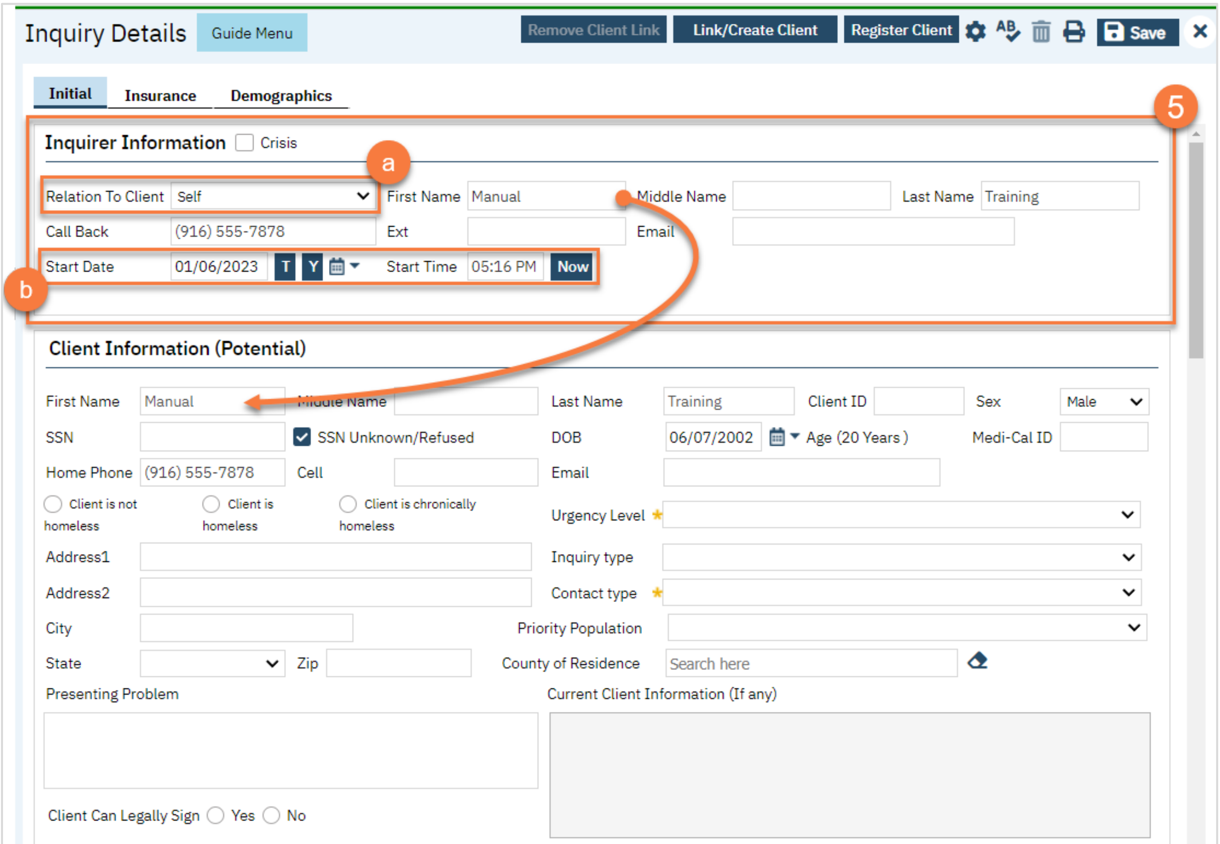


a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc. If you find the person in the system, meaning they show in the Records Found section, click "Select" to bring their information into the Inquiry screen.

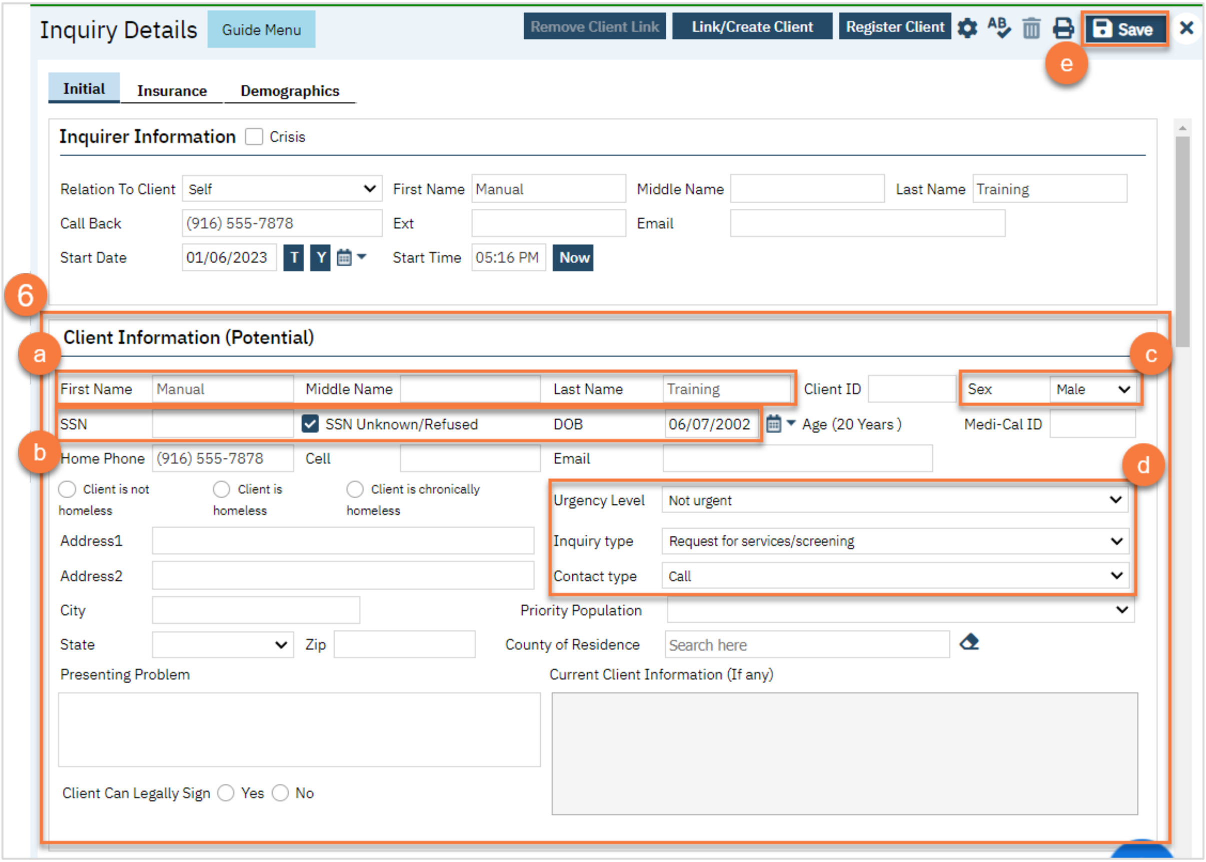


5. This brings you to the Inquiry Details screen. **Complete the information about the caller, or "Inquirer"**.

a. If the client is calling for themselves, select “Self” under “Relation to Client.” This way, as you enter the caller’s information, it will push this information automatically into the “Client Information” section.
b. Make sure to input the start date and time of the call. There are buttons for “T” (today) and “Now” to help make this quick and easy.



6. Complete the information about the potential client.
    a. **Complete the First Name and Last Name fields.** Middle Name is not required but can be added as necessary.
    b. **Complete the SSN and DOB fields.** This is for the client’s social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or doesn’t know, you can simply check the box “SSN Unknown/Refused.” Once saved, this will fill in the SSN with “999999999”, which is SmartCare’s version of “no SSN”.
    c. **Complete the Sex field.**
    d. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.
    e. **Click Save.**



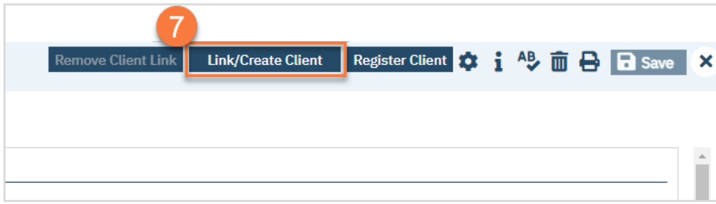
Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition Coordination	Use when the reason for the call is for another provider to coordinate transition of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

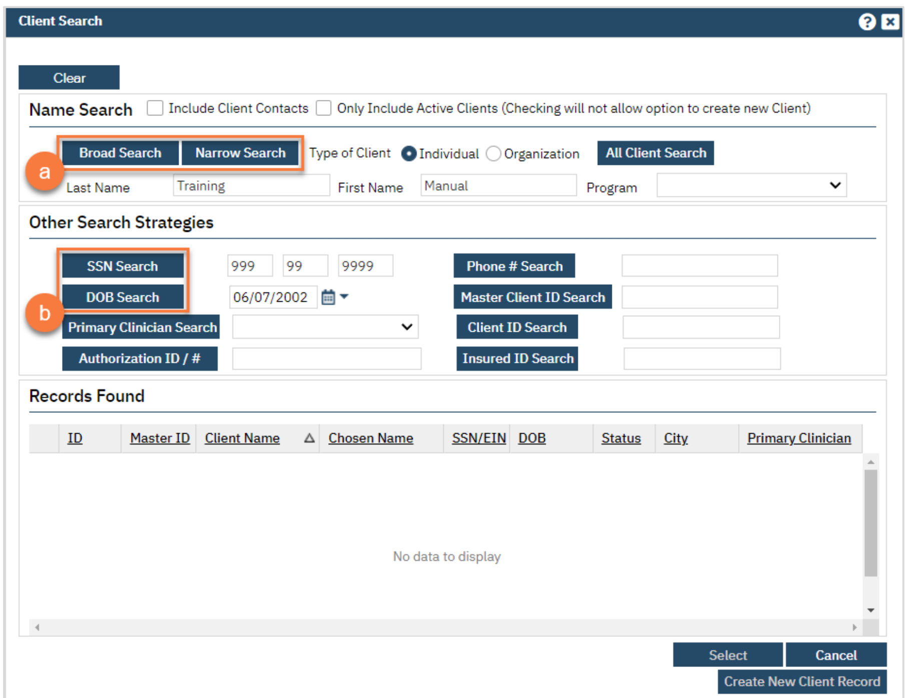
Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county

Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

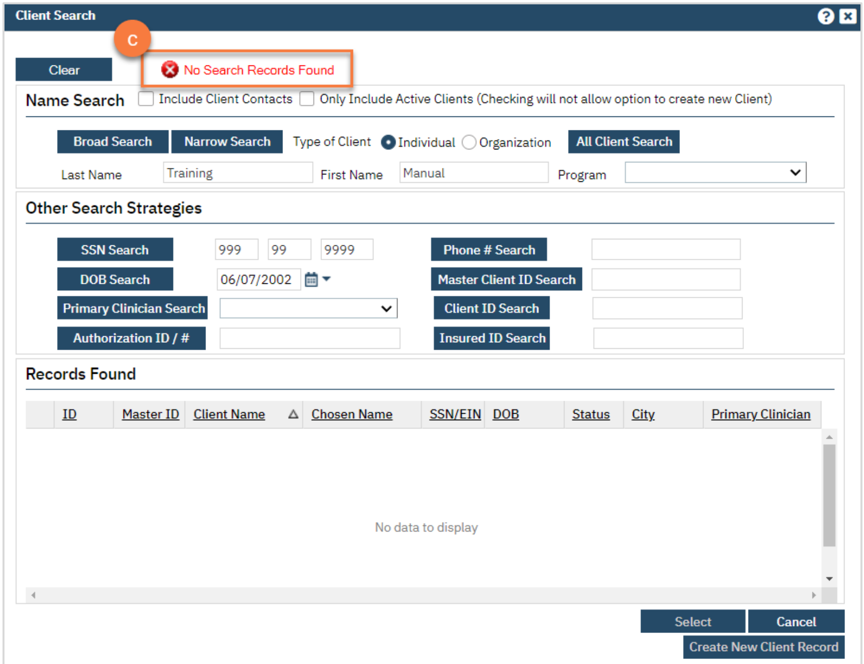
7. **Select the "Link/Create Client" button**. This will bring up the client search window, with a few extra buttons at the bottom.



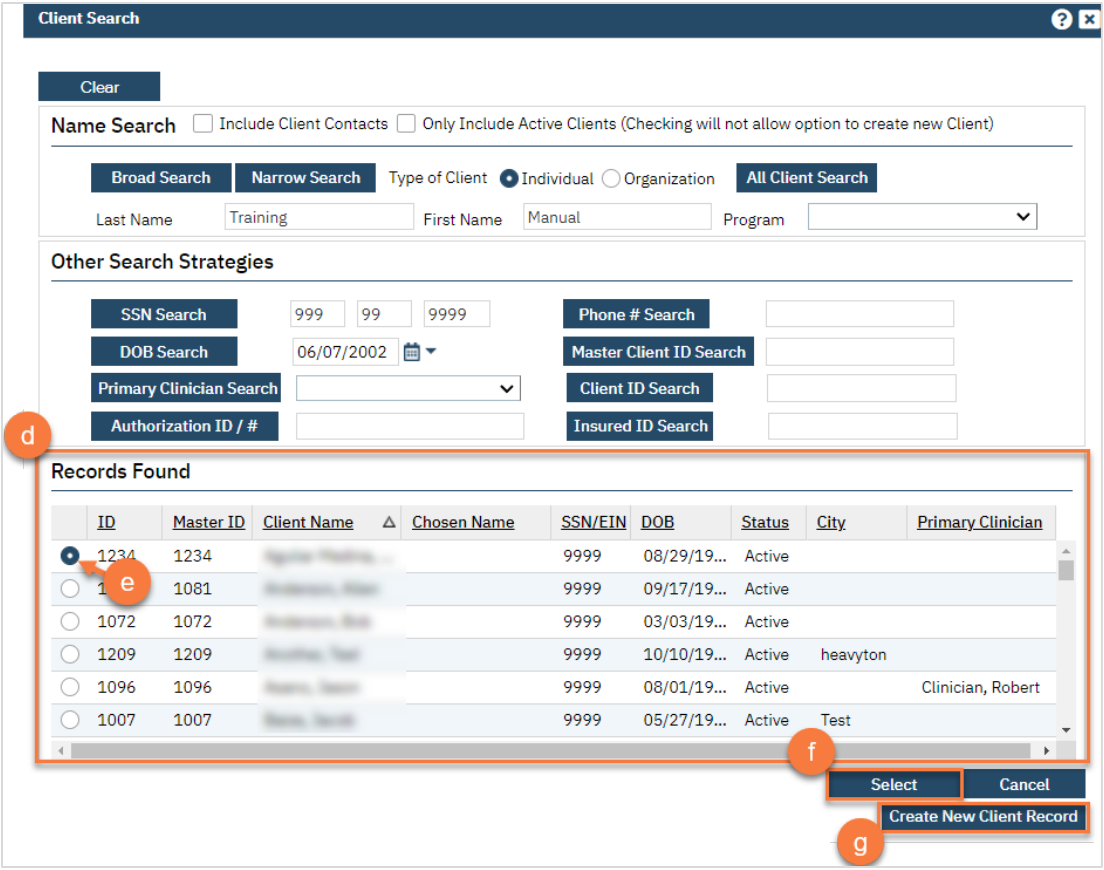
   a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
   b. You must also **search by SSN and DOB** by clicking on those respective buttons.



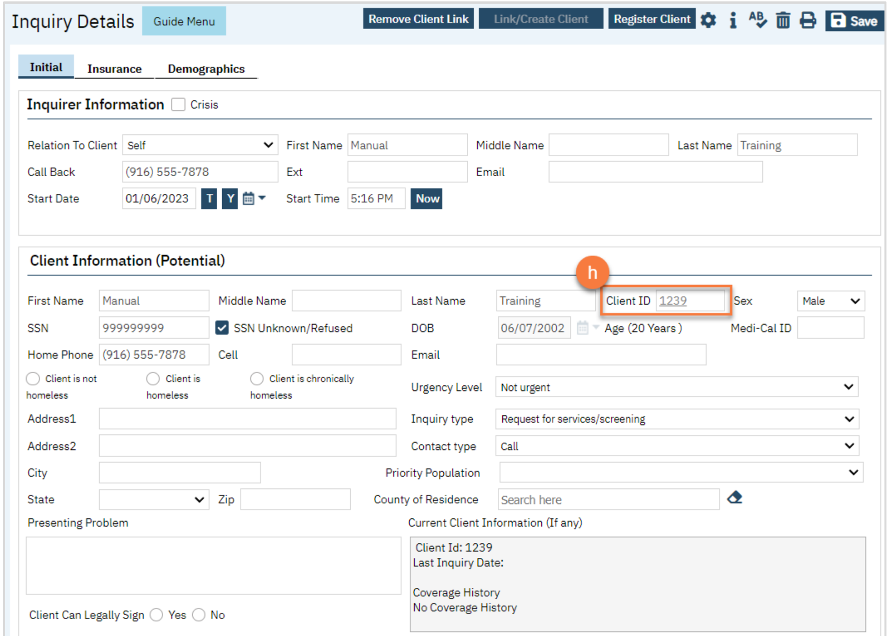
   c. If no records are found based on the search you do, an alert will show at the top of the window.



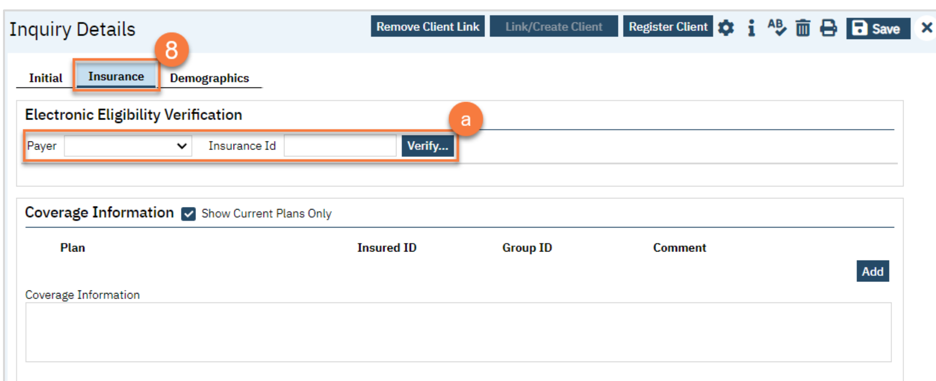
d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
e. If the person is already a client in the system, **select the button next to the appropriate record.**
f. **Click "Select"** to link the Inquiry to the selected client.
g. If the person is not a client, meaning no records were found matching the client's information, **click "Create New Client Record."**



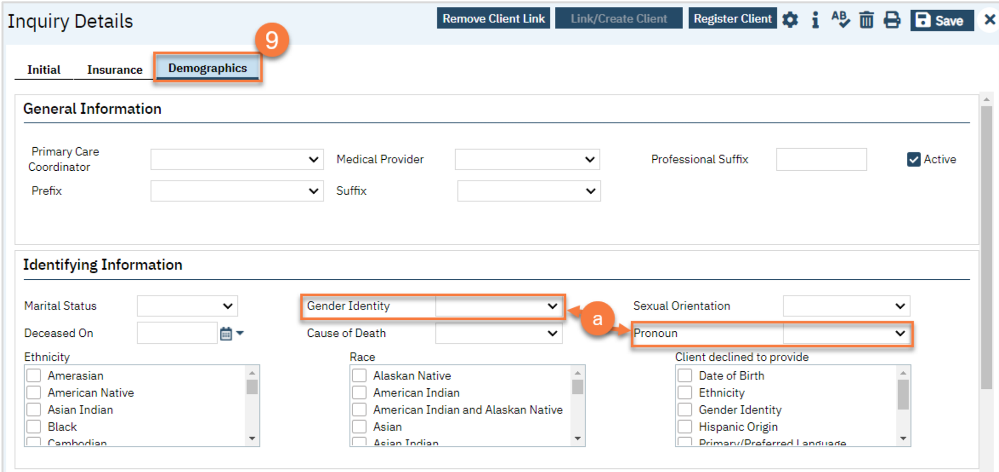
h. This will take you back to the Inquiry screen but now a client ID number will be added.



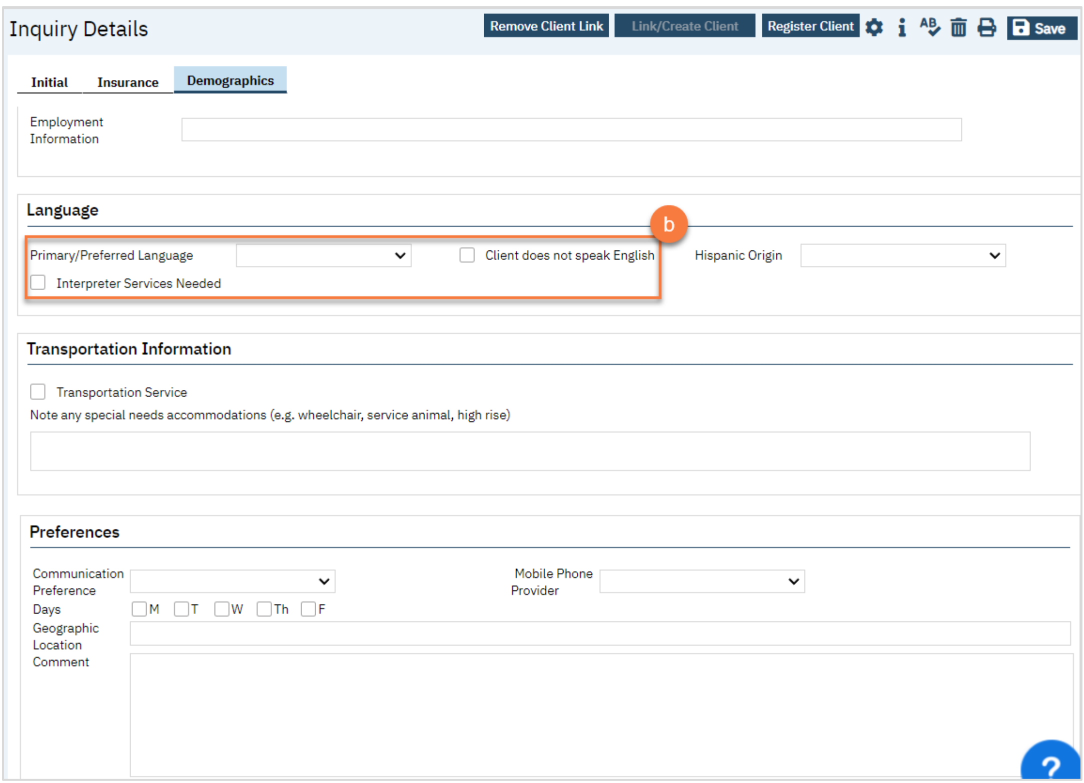
8. Click on the “Insurance” tab.
   a. **Select “Medi-Cal” from the “Payer” drop-down and enter the client’s Medi-Cal number (CIN) in the “Insurance ID” field. Click “Verify”** to verify the client’s Medi-Cal insurance.



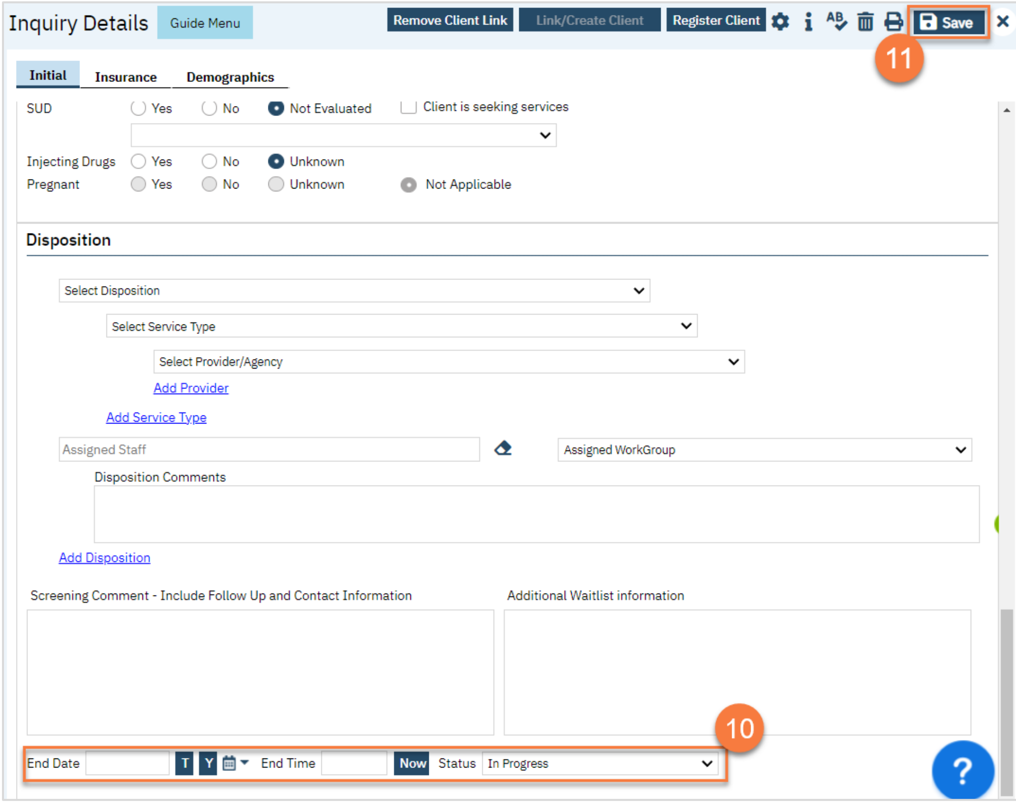
9. Click on the “Demographics” tab.
   a. We recommend **completing the “Gender Identity” and “Pronoun” fields** to ensure the person is not misgendered as additional staff engage with the client.



b. **Complete the "Primary/Preferred Language" field.** If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.



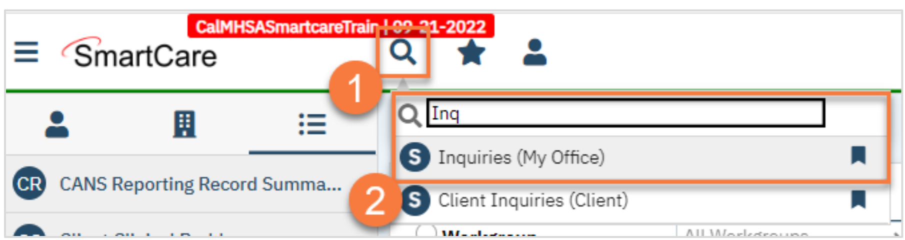
10. You may enter any additional information in any of the tabs, but none are required. Once complete, **enter the end date and time of the Inquiry and change the status to "Complete".** Once again, there are "T" (today) and "Now" buttons to make this easier.
11. **Click Save.** You may now close the Inquiry and move on to Screening.



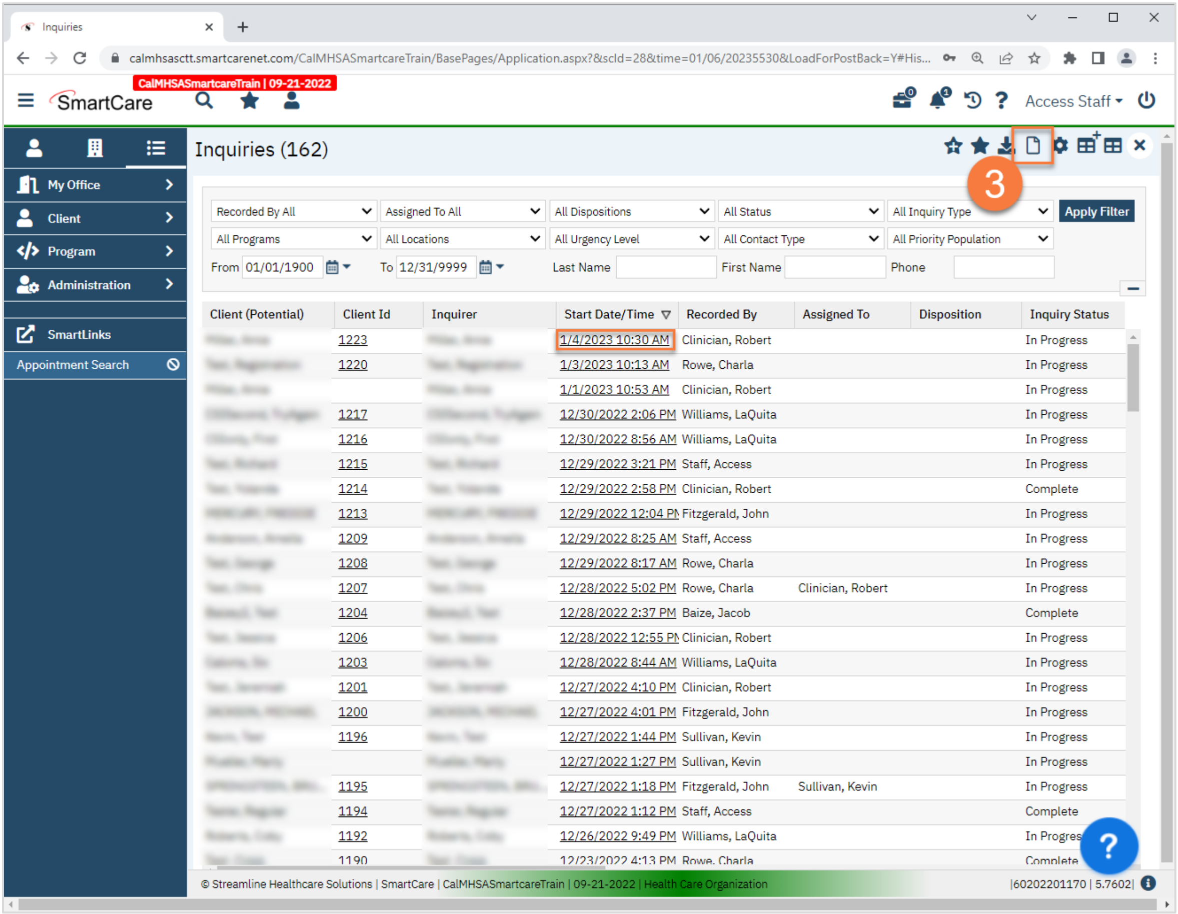
How do I document calls to the Crisis Line?

Crisis Line calls are documented on the Inquiry screen. This is simply how to document a call. Follow your county's procedures for handling crisis situations. Also consider the context of your crisis call when asking for information. Address the client's most pressing needs before attempting to gather information such as demographics or date of birth.

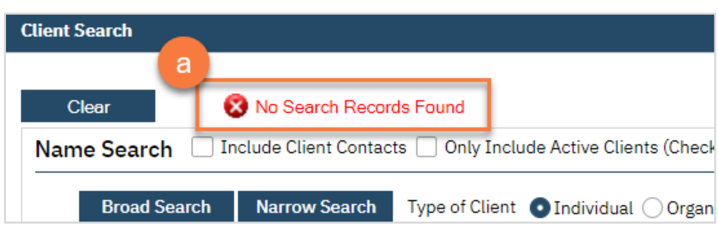
1. Search for the Inquiry screen using the search icon.
2. Select "Inquiries (My Office)"



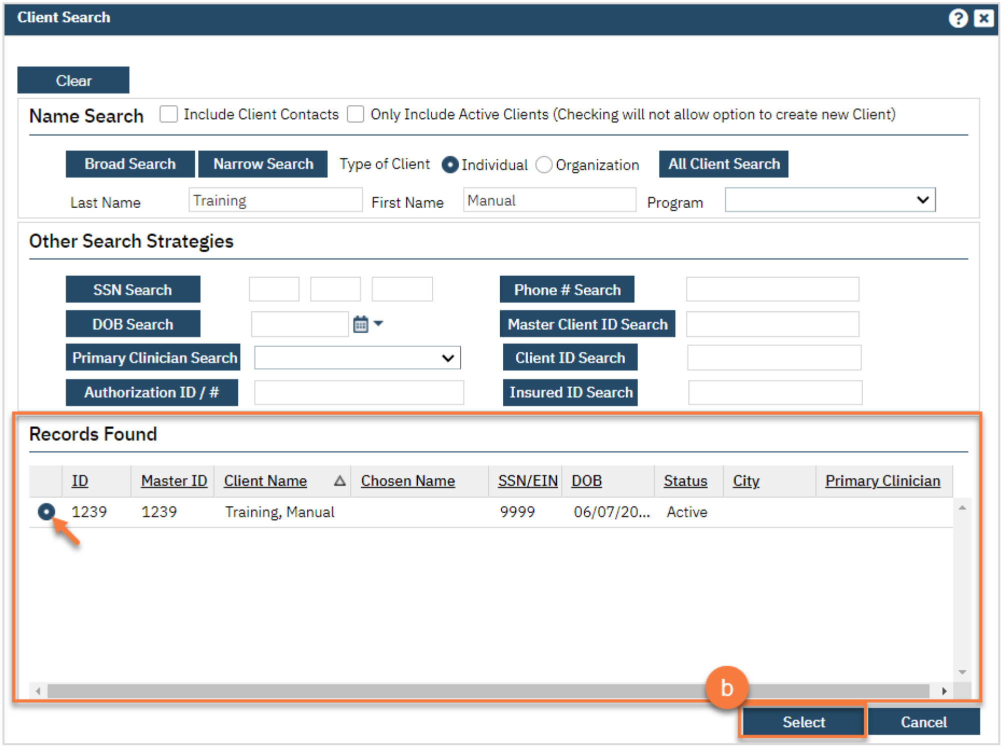
3. This will bring you to the Inquiries list page. If this call was transferred to you, search the list page to determine if an inquiry has already been started for this client. If so, click the link in the Start Date/Time column. If an inquiry has not been started, or if the call was direct to the crisis line, create a new inquiry by using the new icon.



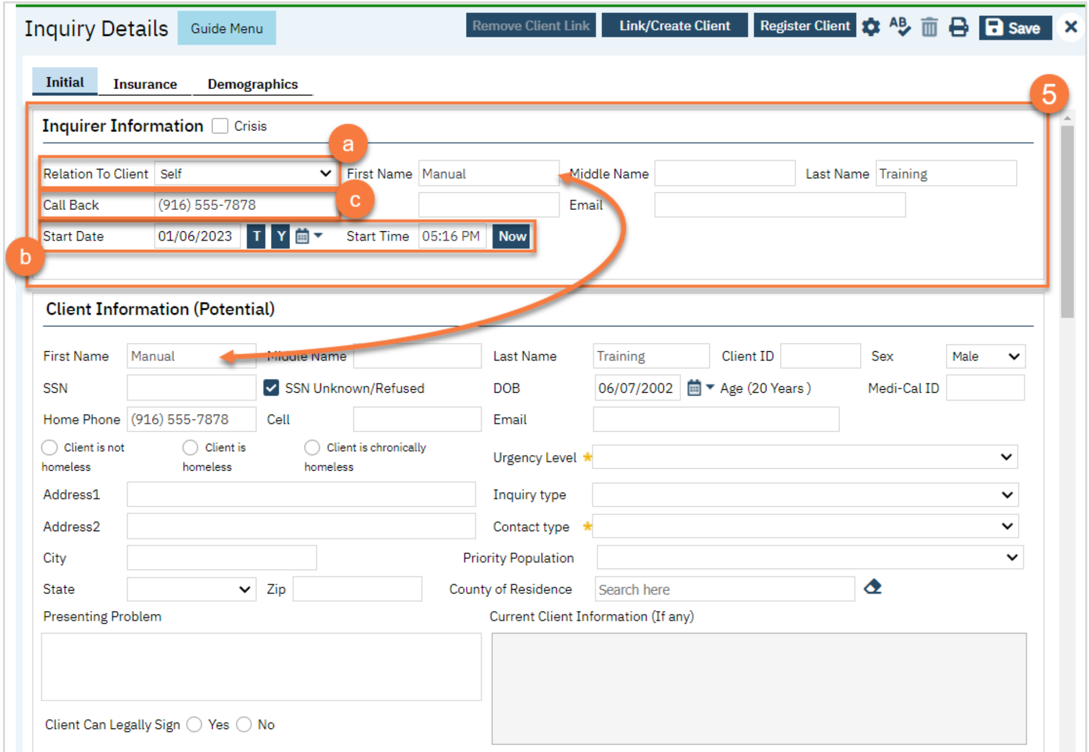
4. This will bring up the client search window. **Search to determine if the person is a client in the system**. The search includes both current and past clients. You can also **skip this step by selecting "Inquiry (New Client)"** if you know for certain this person is not a client in the system (e.g. they don't have a SmartCare client ID).
    a. If there are no matching records, an alert will show at the top of the Client Search window. You may want to try searching by DOB or SSN. **If there are no results, select "Cancel."** This will take you to the Inquiry screen.



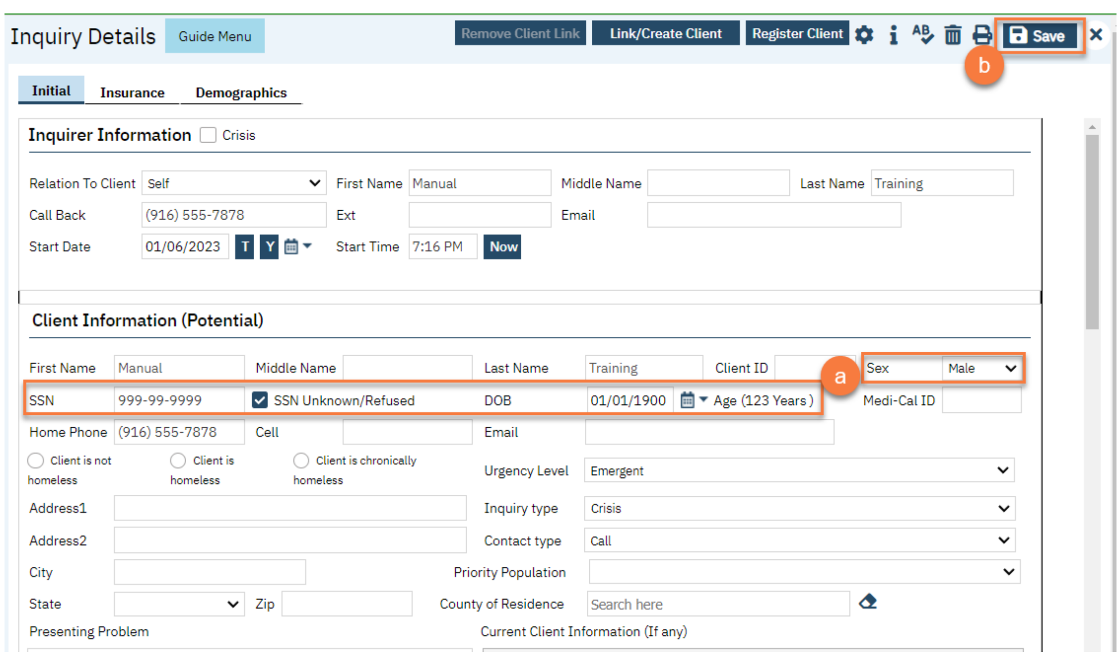
    b. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client. If the person is already a client in the system, **select the button next to the appropriate record. Click "Select"** to link the Inquiry to the selected client. This will take you to the Inquiry screen and pre-populate the Client Information section.



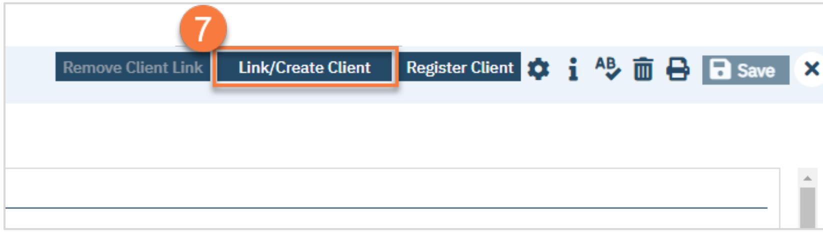
5. **Complete the information about the caller, or "Inquirer"**.
    a. Complete the **"Relation to Client" field.** If the client is calling for themselves, select "Self". If you've already selected a client, this section will auto-populate with the client's information. If the person is not already a client, as you enter the caller's information, it will push this information automatically into the "Client Information" section.
    b. **Enter the start date and time of the call.** There are buttons for "T" (today) and "Now" to help make this quick and easy.
    c. You may also **consider getting a call back number**, in case the client is disconnected or hangs up.



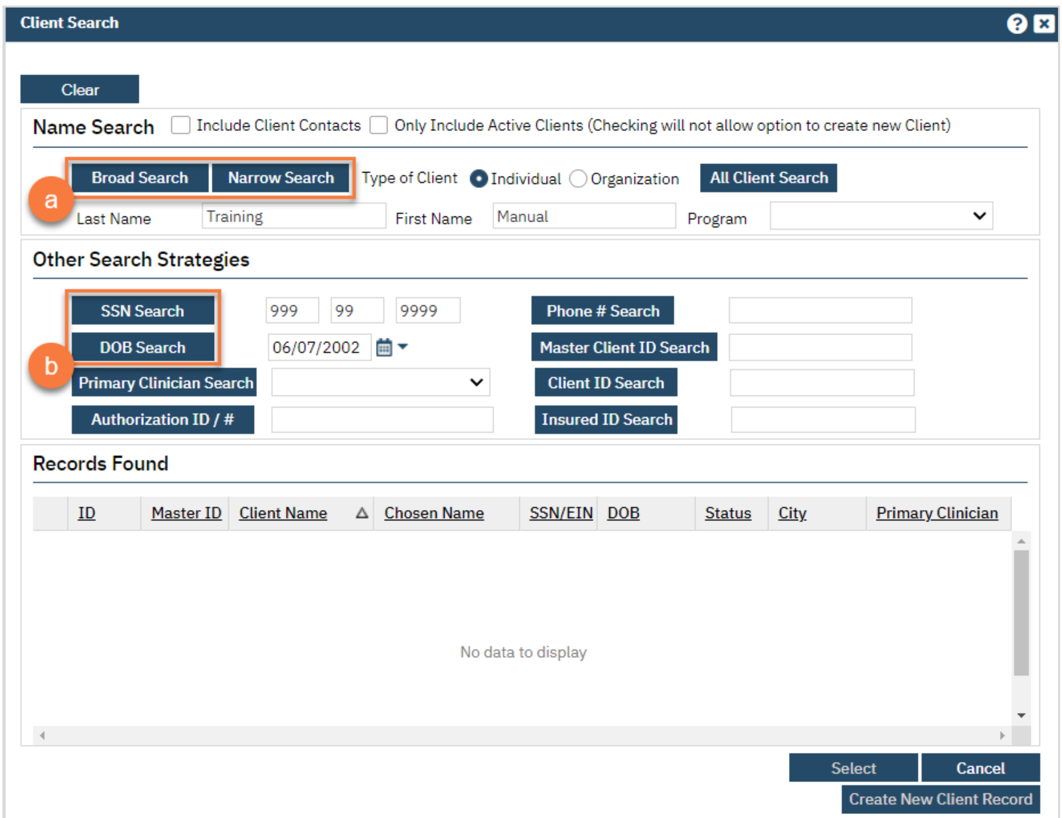
6. If the person is not a current client, add them as a client. To do this, **complete/confirm the client's First Name and Last Name fields**.
    a. **Complete the SSN, DOB, and Sex fields.** If the client refuses to share their SSN, doesn't know their SSN, or is not in a situation to answer, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN". If the client is unable to provide their date of birth, enter your county's standard response to indicate "unknown DOB". All of these fields can be updated at a later date.
    b. **Click Save.**



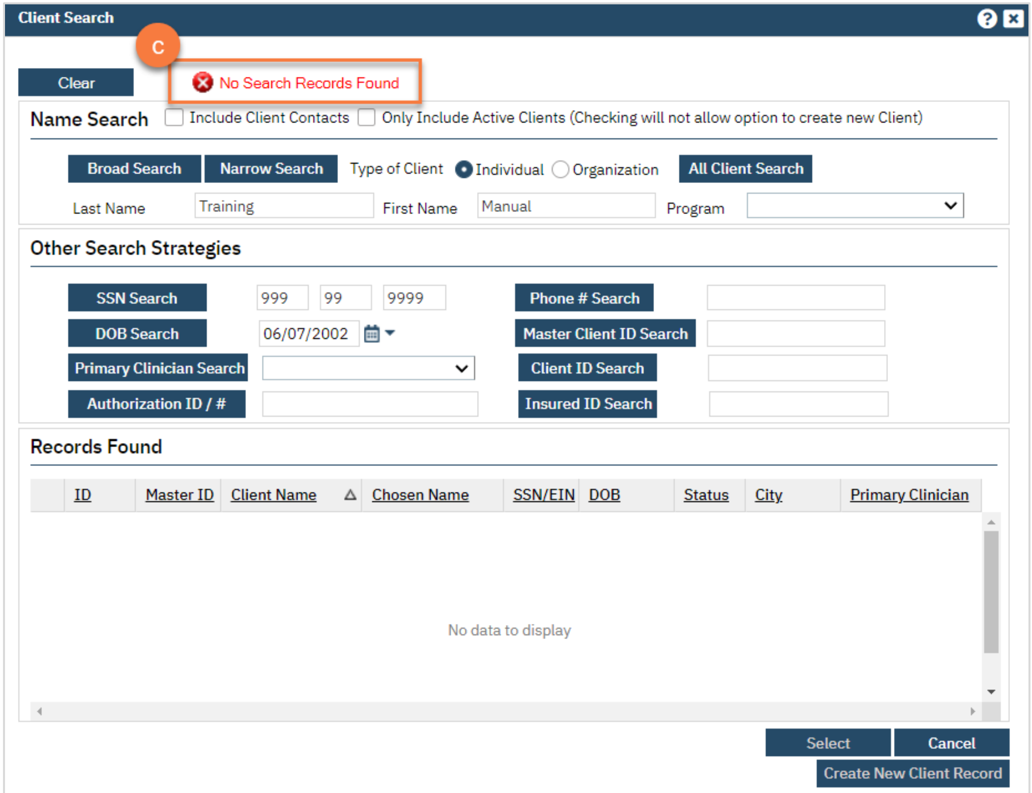
7. **Select the "Link/Create Client" button**. This will bring up the client search window, with a few extra buttons at the bottom.



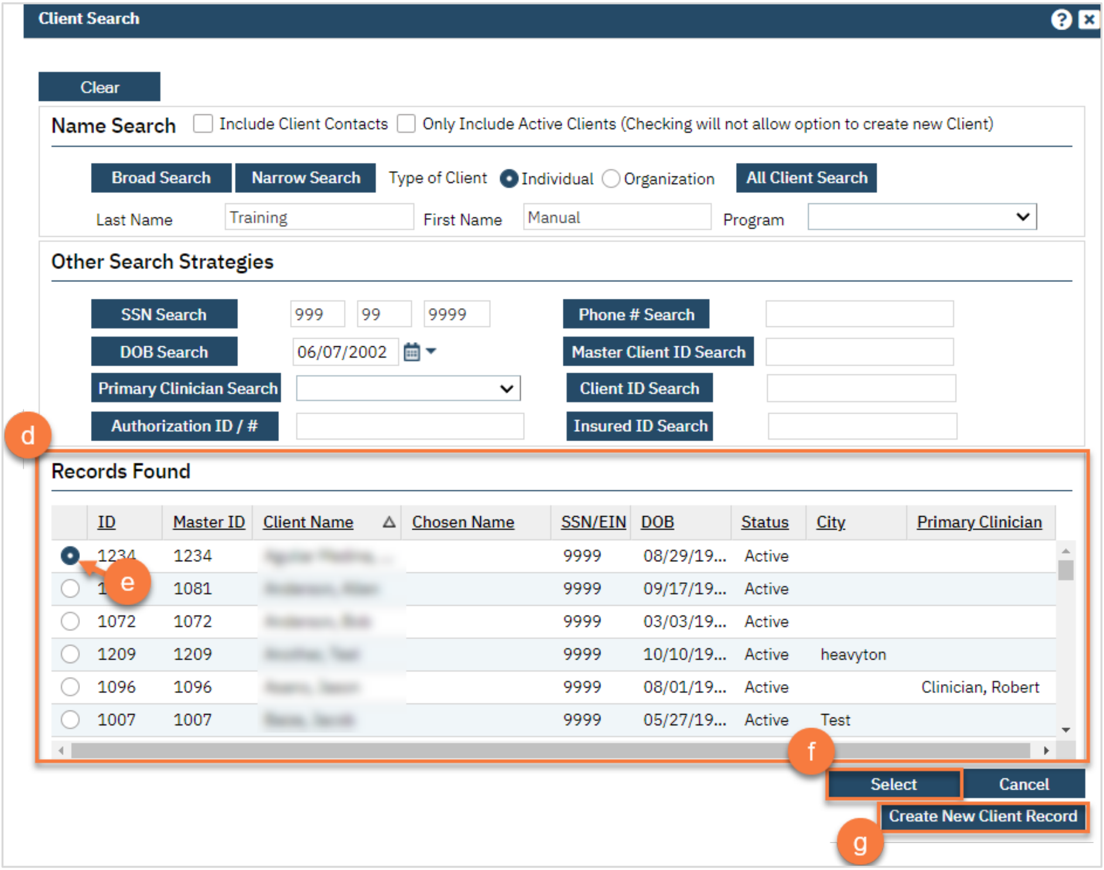
   a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
   b. You must also **search by SSN and DOB** by clicking on those respective buttons.



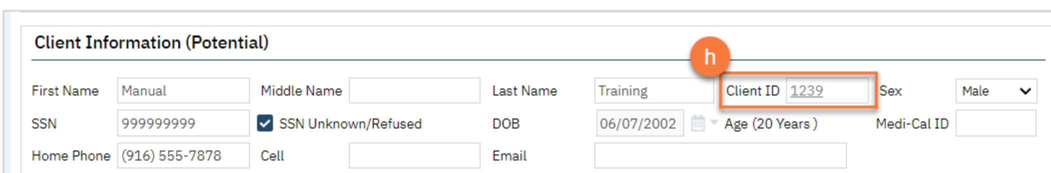
   c. If no records are found based on the search you do, an alert will show at the top of the window.



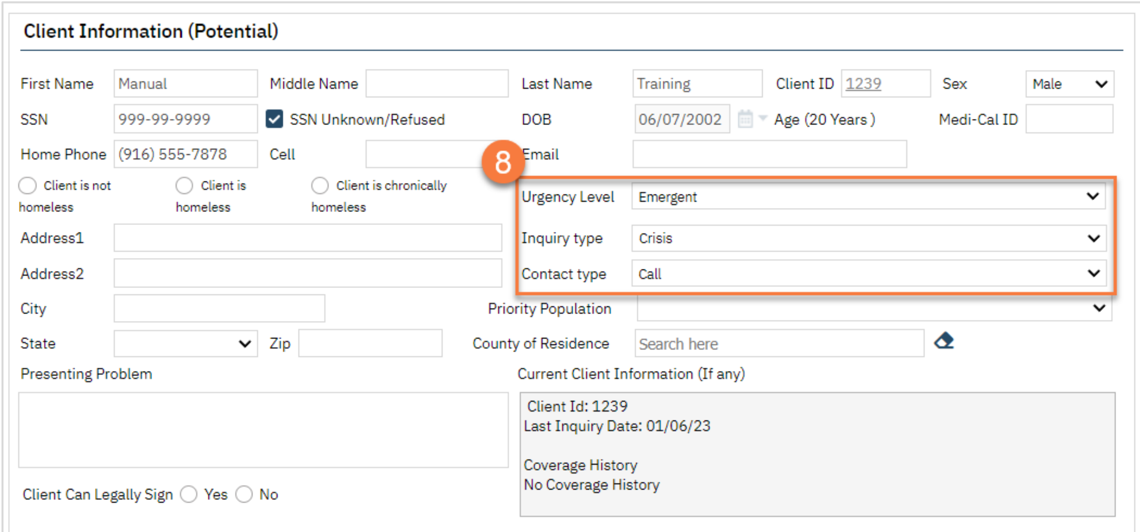
d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
e. If the person is already a client in the system, **select the button next to the appropriate record.**
f. **Click "Select"** to link the Inquiry to the selected client.
g. If the person is not a client, meaning no records were found matching the client's information, **click "Create New Client Record."**



h. This will take you back to the Inquiry screen but now a client ID number will be added.



8. Assess the urgency of the call, as sometimes people call the Crisis Line by mistake. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.

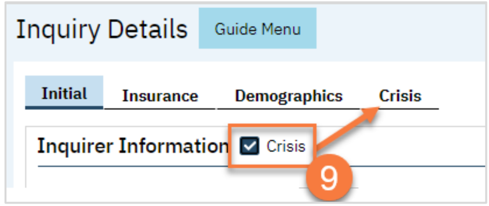


Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

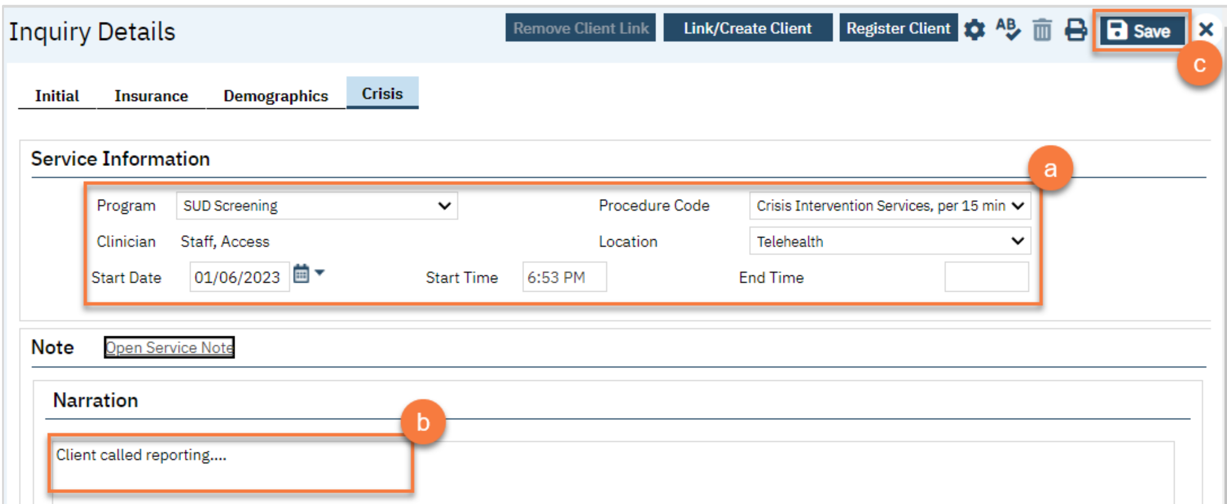
Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition Coordination	Use when the reason for the call is for another provider to coordinate transition of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county
Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

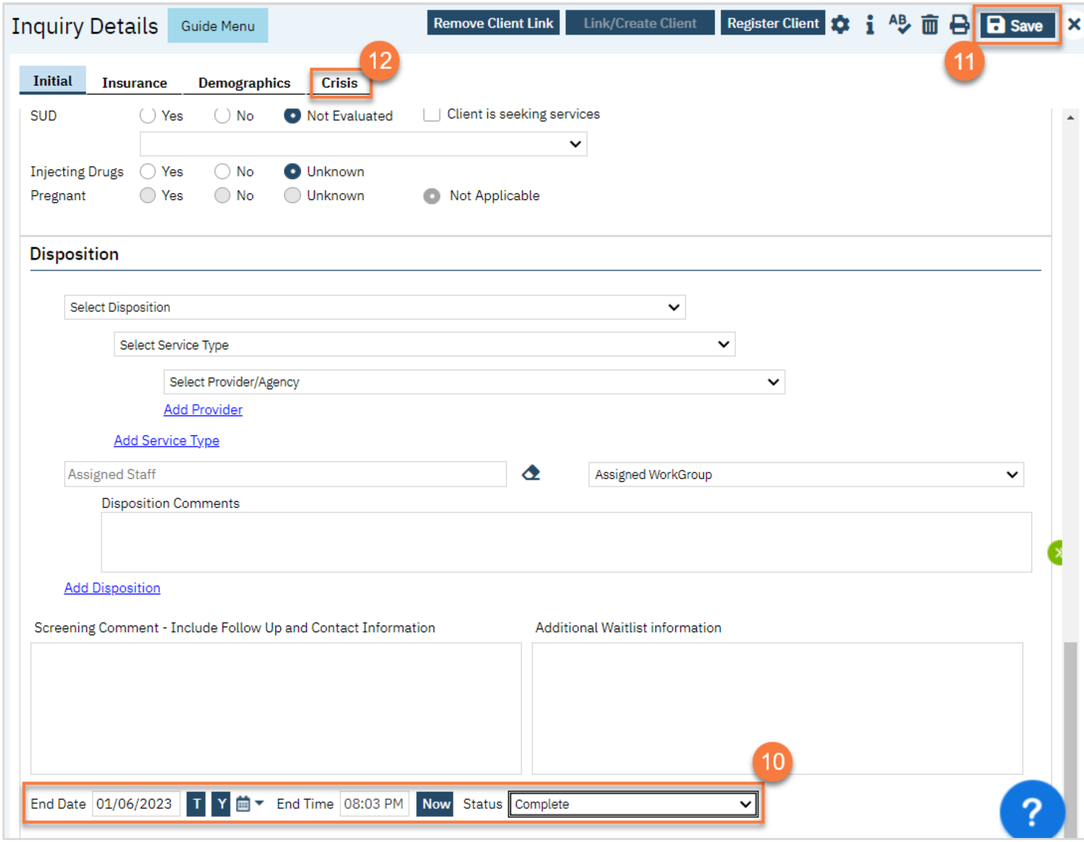
9. If the person is actually in crisis, **select the checkbox labeled "Crisis"** at the top of the screen. This opens a new tab where you'll document your call with the client. If the client is not actually in crisis, document the call as appropriate. If the client is requesting services, we recommend following the steps in How do I document a request for services received via the Access Line?



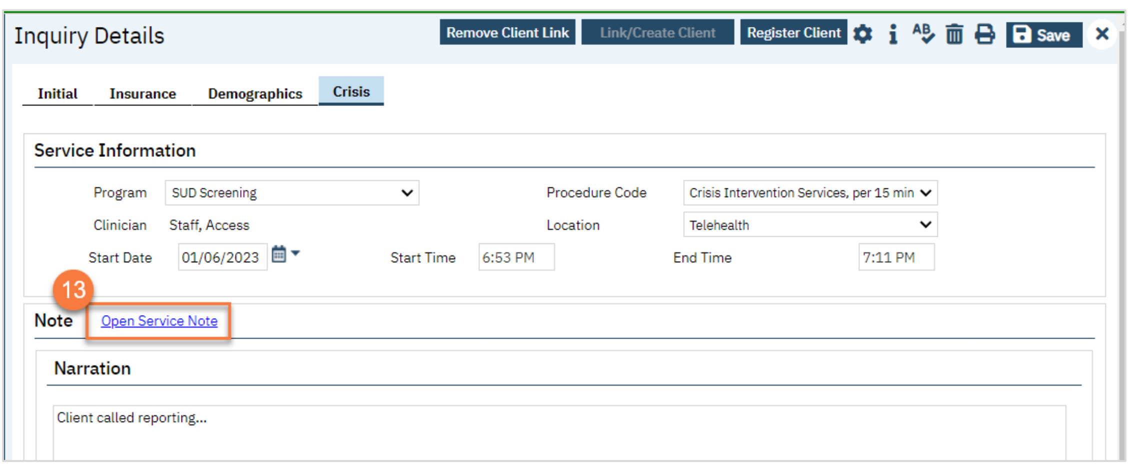
a. In the Crisis tab, **enter the service information.** This will then open a text field for you to enter the note.
b. **Enter narrative information in the Narration field**.
c. **Click Save**.



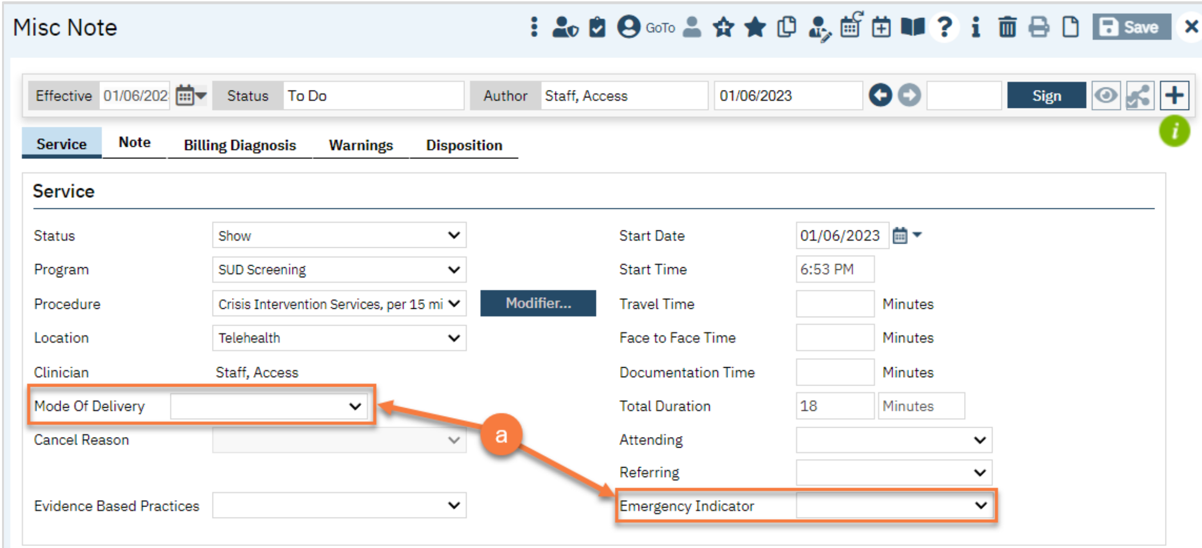
10. When you're finished with the crisis call, navigate back to the Initial tab and scroll to the bottom of the page. **Enter the end date and time of the Inquiry and change the status to "Complete".** Once again, there are "T" (today) and "Now" buttons to make this easier.
11. **Click Save**.
12. **Navigate back to the Crisis tab**.



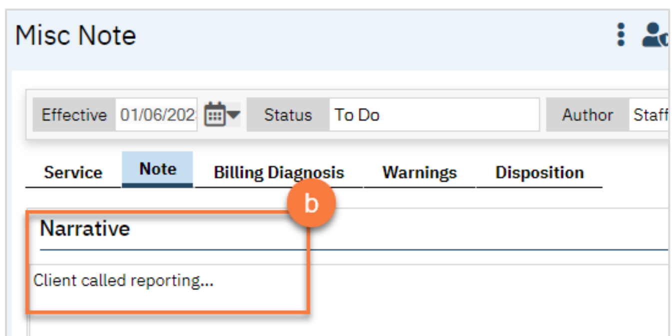
13. **Click the newly available link for Open Service Note**.



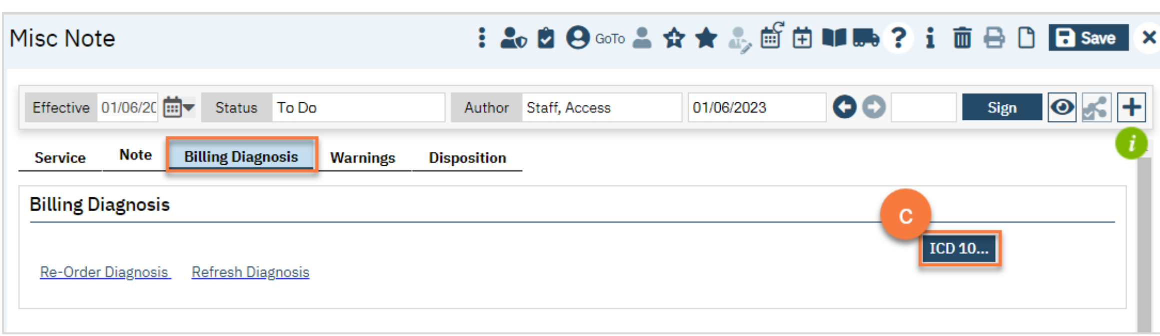
a. This brings up a service note screen. It will pull most information forward, including creating a total duration, based on start and end times. **Enter Emergency Indicator and Mode of Delivery**, as well as any other necessary fields.



b. **Click on the Note tab to confirm your narrative note was pulled forward.** Add any additional information as needed.



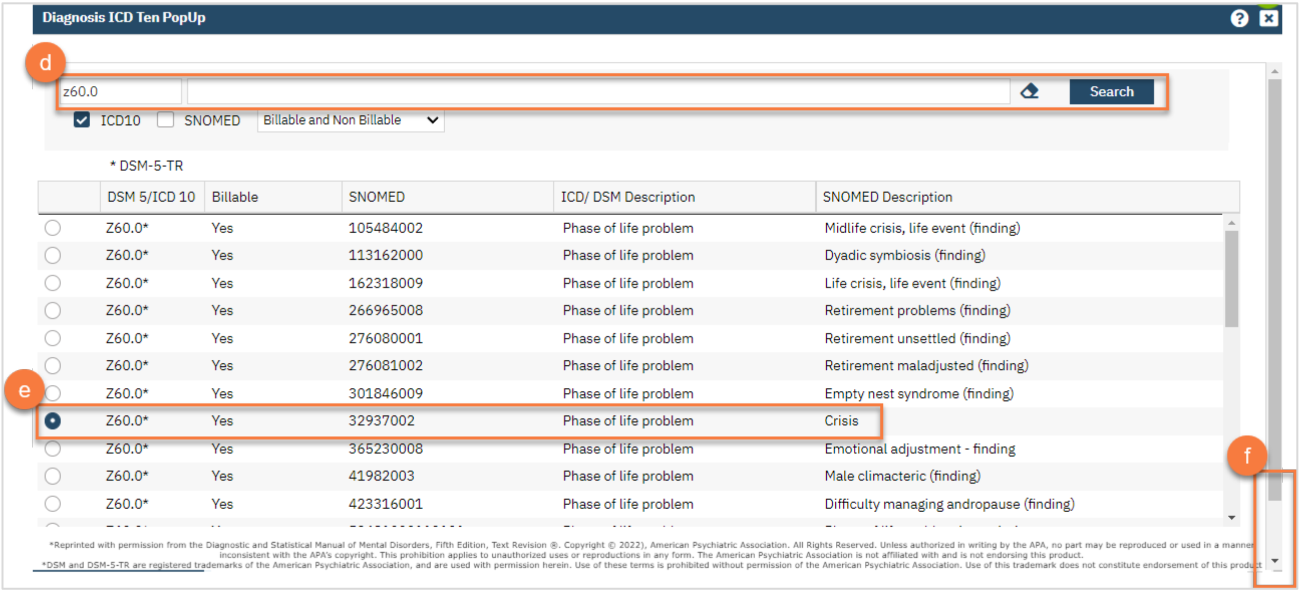
c. **Click on the Billing Diagnosis tab.** If the client already has a diagnosis, you can leave this section as is. If this client does not have a diagnosis, **click on the ICD 10 button.**



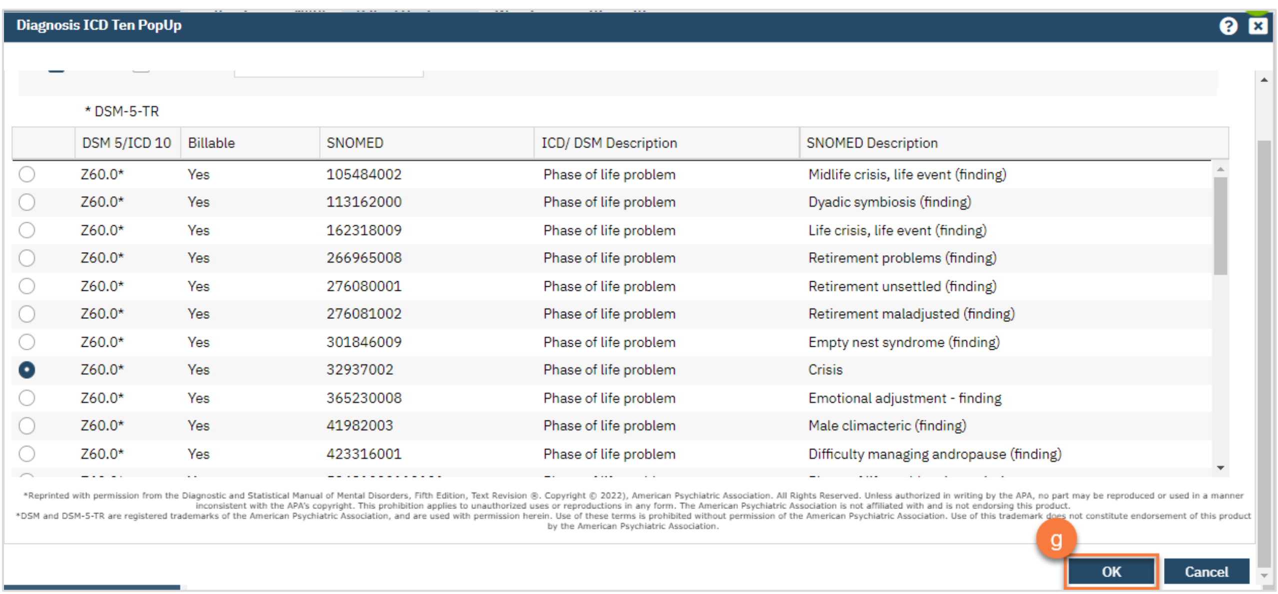
d. This brings up a Diagnosis pop-up window. **Search for a diagnosis using the code field or description field.** If you are an LPHA, you may use "Z03.89 Encounter for observation for other suspected diseases and conditions ruled out". If you are not an LPHA, you can select an appropriate Social Determinant of Health, such as "Z60.0 Phase of life problem – Crisis".

e. **Select the code you want to use.**

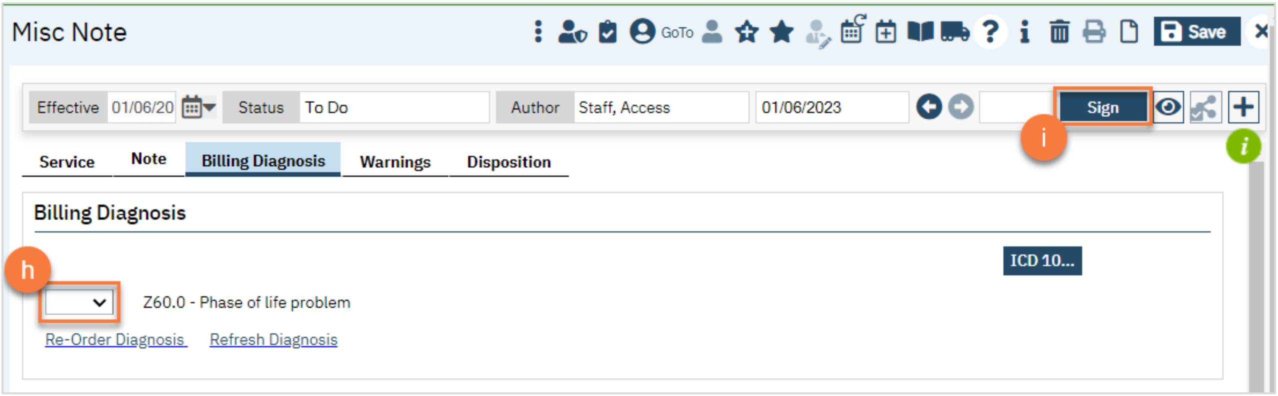
f. **Scroll to the bottom of the screen.**



g. Click **OK**.



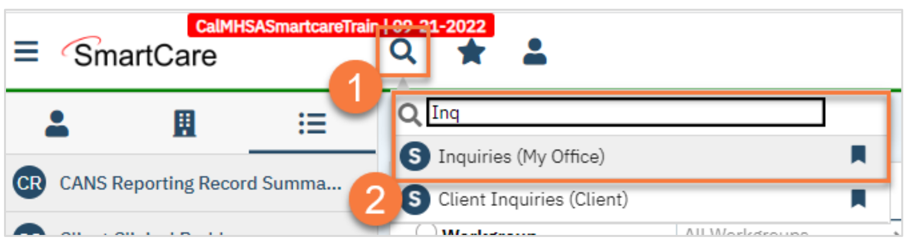
h. This brings you back to the Billing Diagnosis tab on the note. **Select "1" from the drop down next to the newly added ICD-10 code**.
i. Once you've completed all pieces of the service note, **click Sign**. You are now finished and may close any open screens.



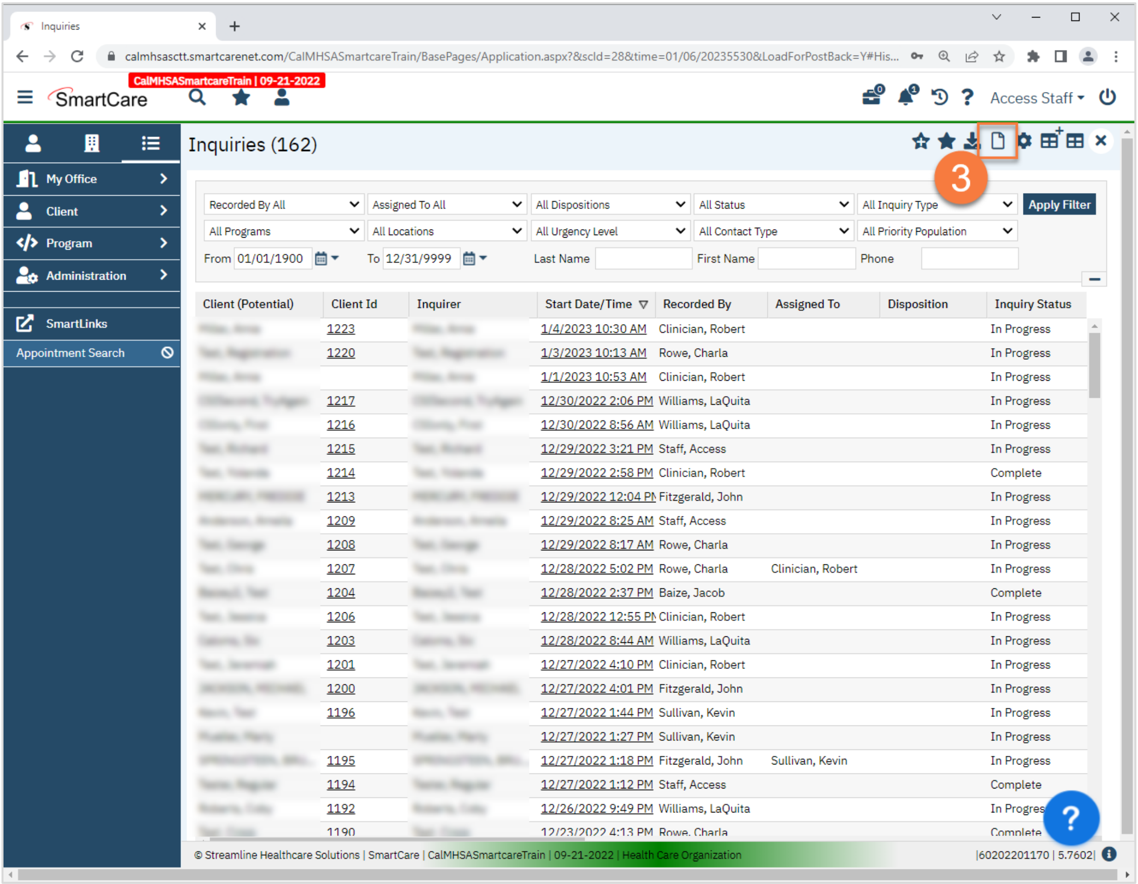
What do I do when I receive a paper referral from a partner agency?

Paper referrals, meaning referrals that are received via a form, fax, paper, etc. are documented on the Inquiry screen.

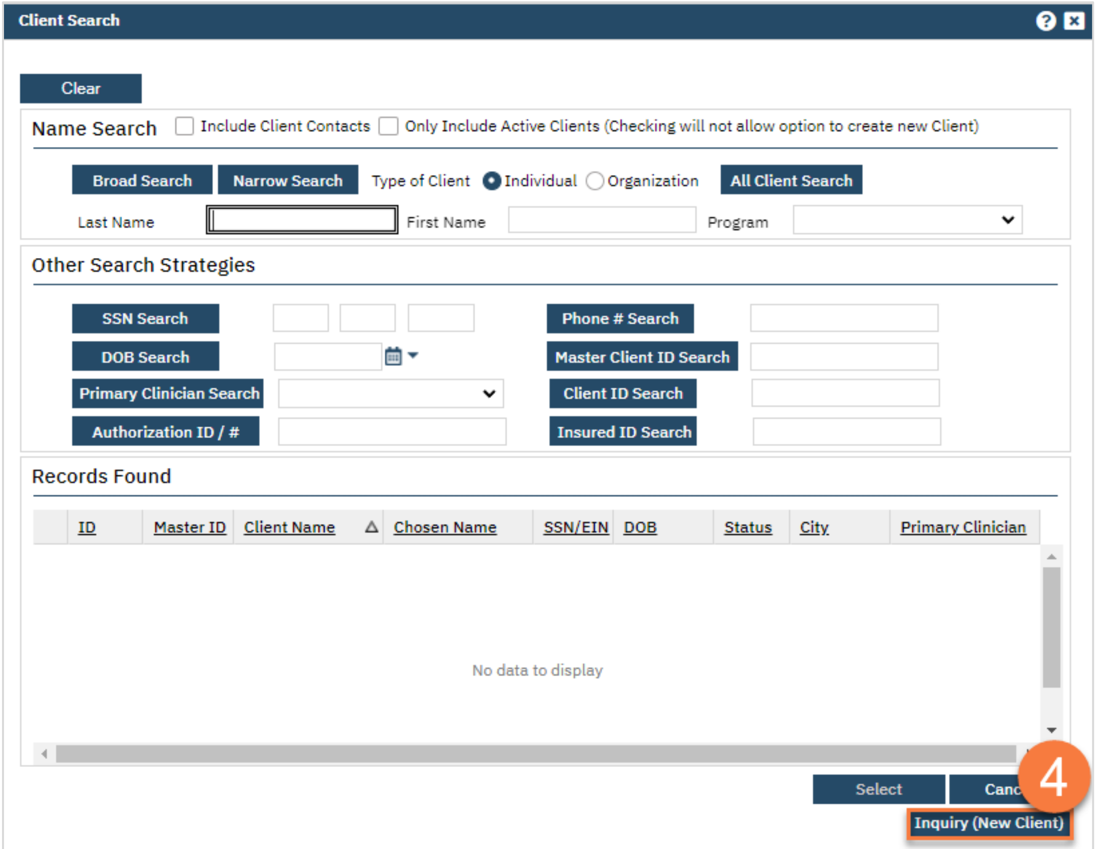
1. **Search for the Inquiry screen** using the search icon.
2. **Select "Inquiries (My Office)"**



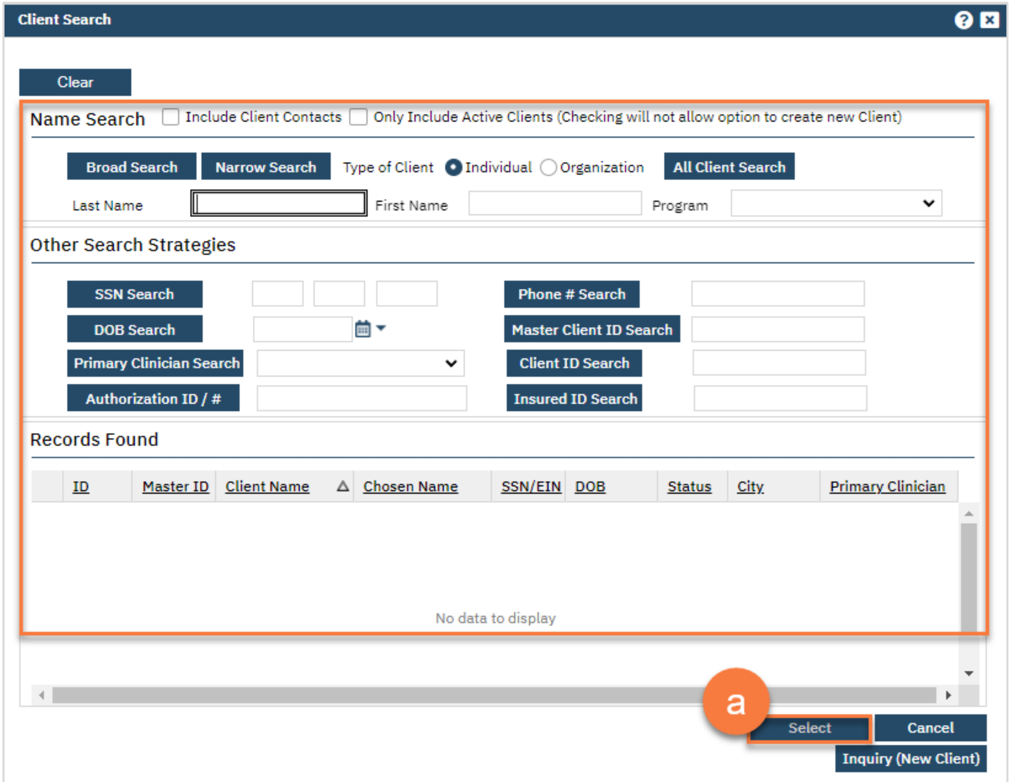
3. This will bring you to the Inquiries list page. **Create a new inquiry** by using the new icon.



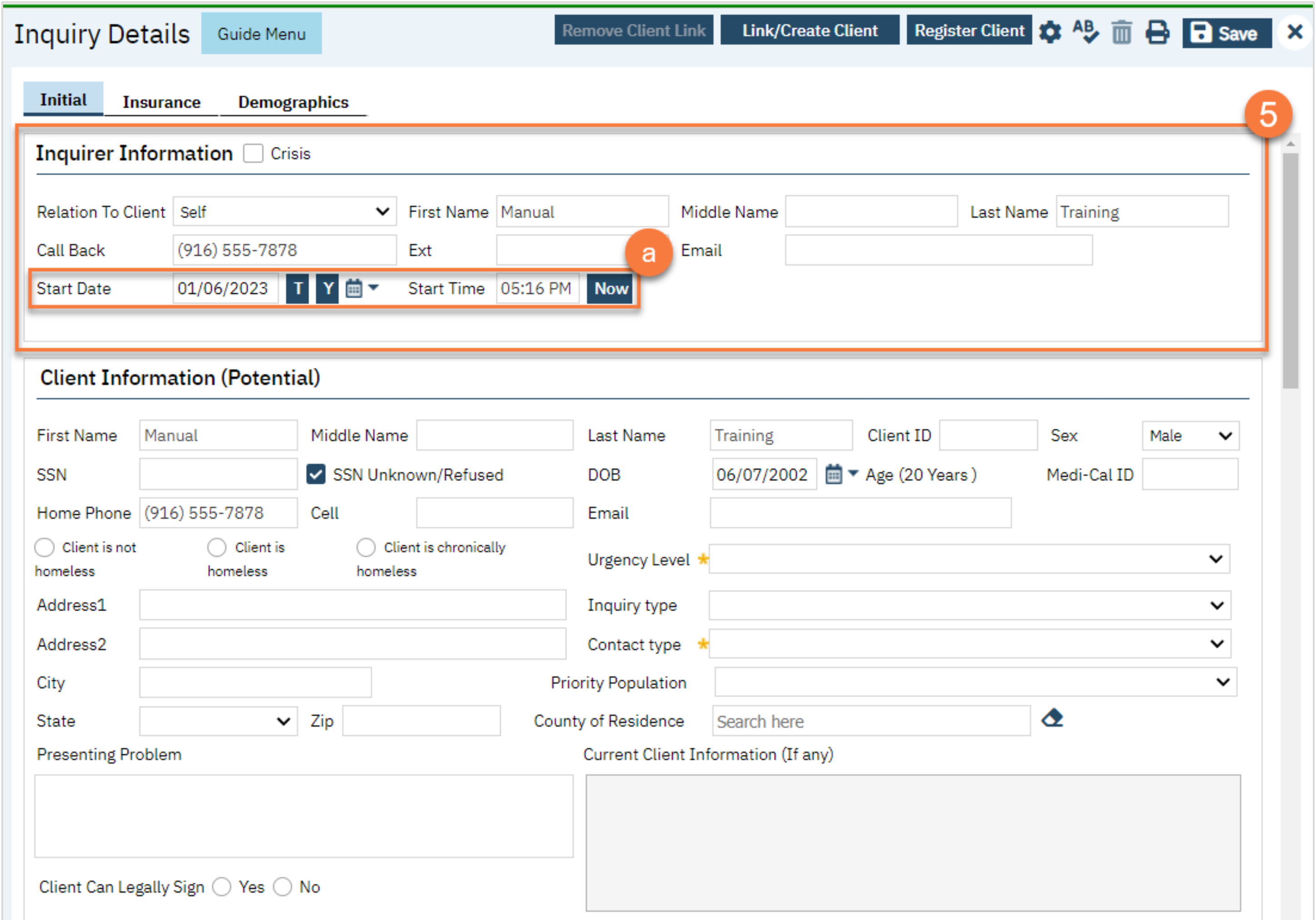
4. This will bring up the client search window. **You may search to determine if the person is a current client**. If person is a new client, or you cannot find them in the system, **click "Inquiry (New Client)"**.



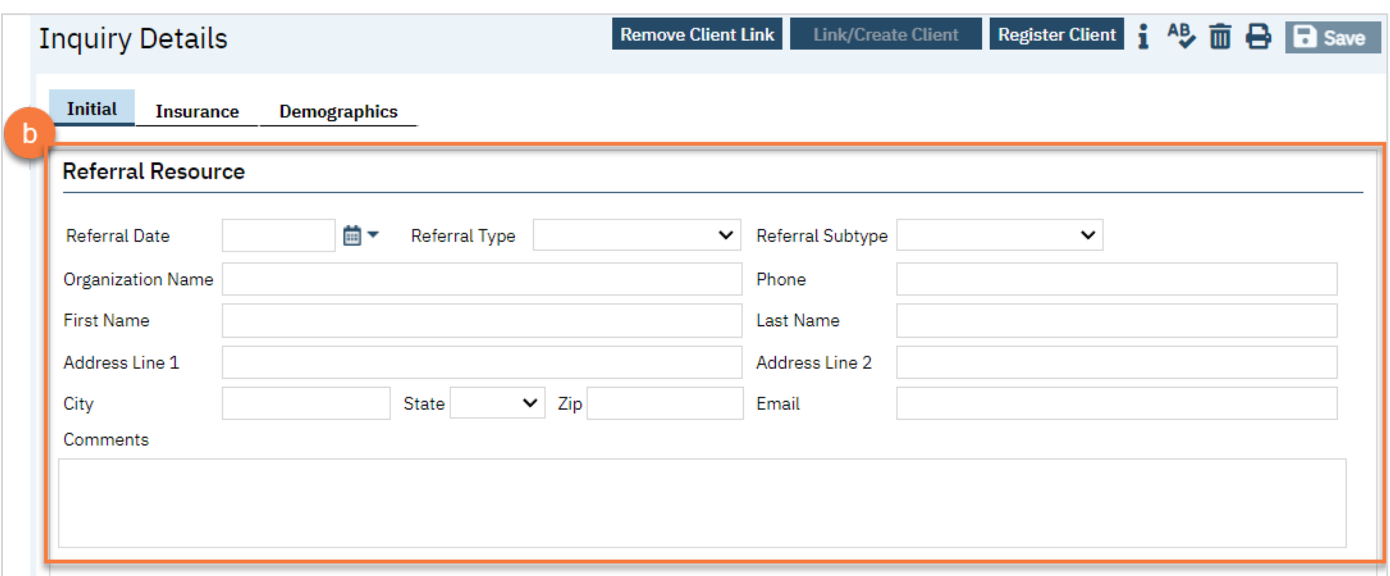
a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc. If you find the person in the system, meaning they show in the Records Found section, click "Select" to bring their information into the Inquiry screen.



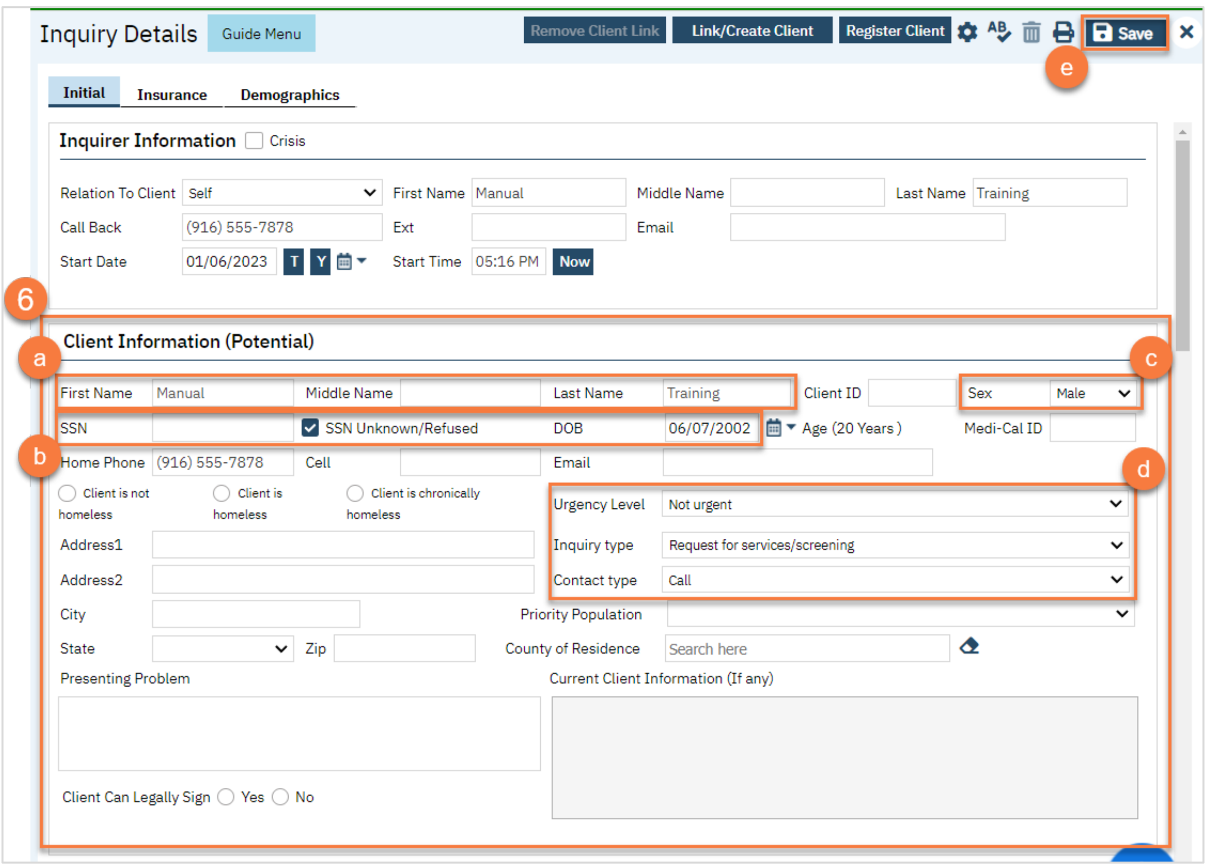
5. This brings you to the Inquiry Details screen. **Complete the information about the person requesting services, or "Inquirer"**.
    a. Make sure to input the date and time you received the referral in Start Date and Start Time. There are buttons for "T" (today) and "Now" to help make this quick and easy.



b. To complete the rest of the referring agency's information, navigate to the Referral Resource section further down on the page. Your county may choose to leave the inquirer information blank and simply enter the agency information, along with contact person, in this section. This section's information currently does not show on the list page, however.



6. Complete the information about the potential client.
    a. **Complete the First Name and Last Name fields.** Middle Name is not required but can be added as necessary.
    b. **Complete the SSN and DOB fields.** This is for the client's social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or doesn't know, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN".
    c. **Complete the Sex field.**
    d. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.
    e. **Click Save.**



Urgency Level	Description/Use Case	Timelines
Emergent	Use if the referral is an emergency	Addressed immediately
Not Urgent	Use if the referral is a routine request for services	Appointment within 10 business days
Urgent	Use if the referral is an urgent request for services	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the referral is a request for new services
Crisis	Use when the referral is for crisis services
Information	Use when the referral is for information

Discharge/Transition Coordination	Use when the referral is for another provider to coordinate transition of care to/from your agency
Jail Diversion	Use when the referral is related to Jail Diversion programs
Consultation	Use when the referral is for an outside provider seeking a consultation
Other	Use when the referral is not addressed by any of the above

Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
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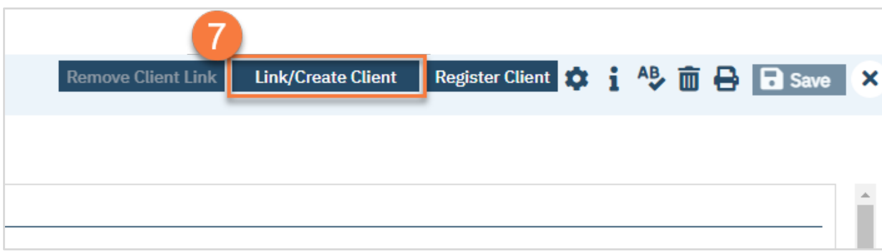
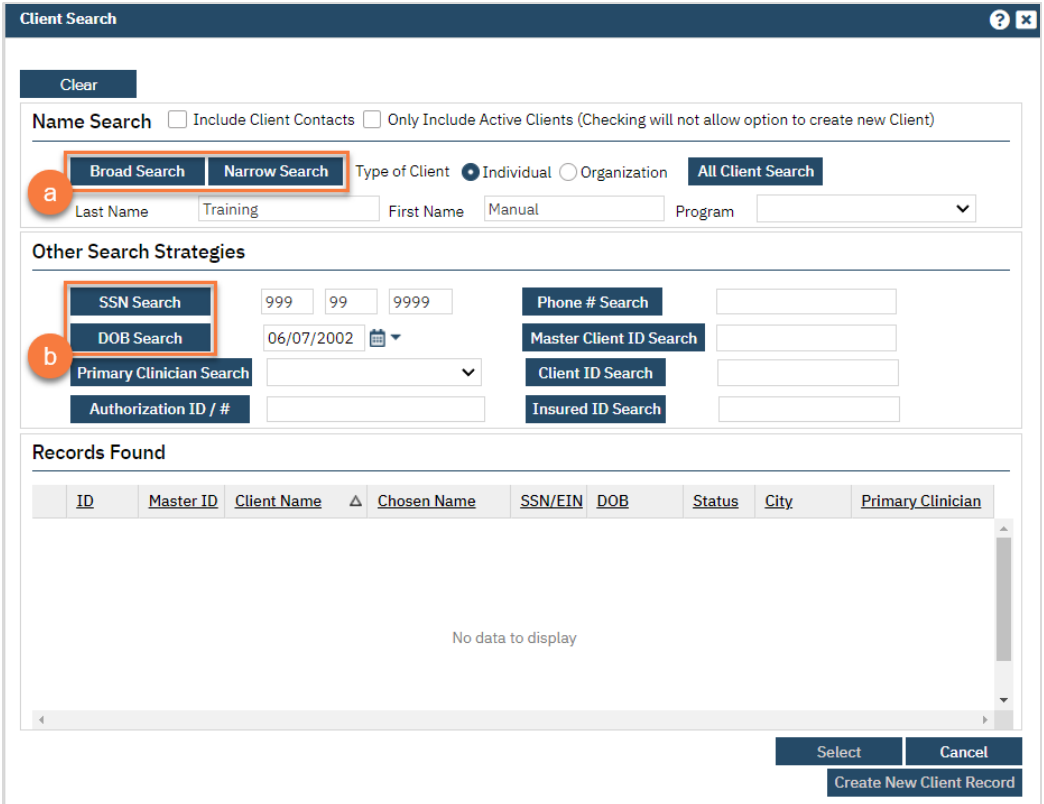
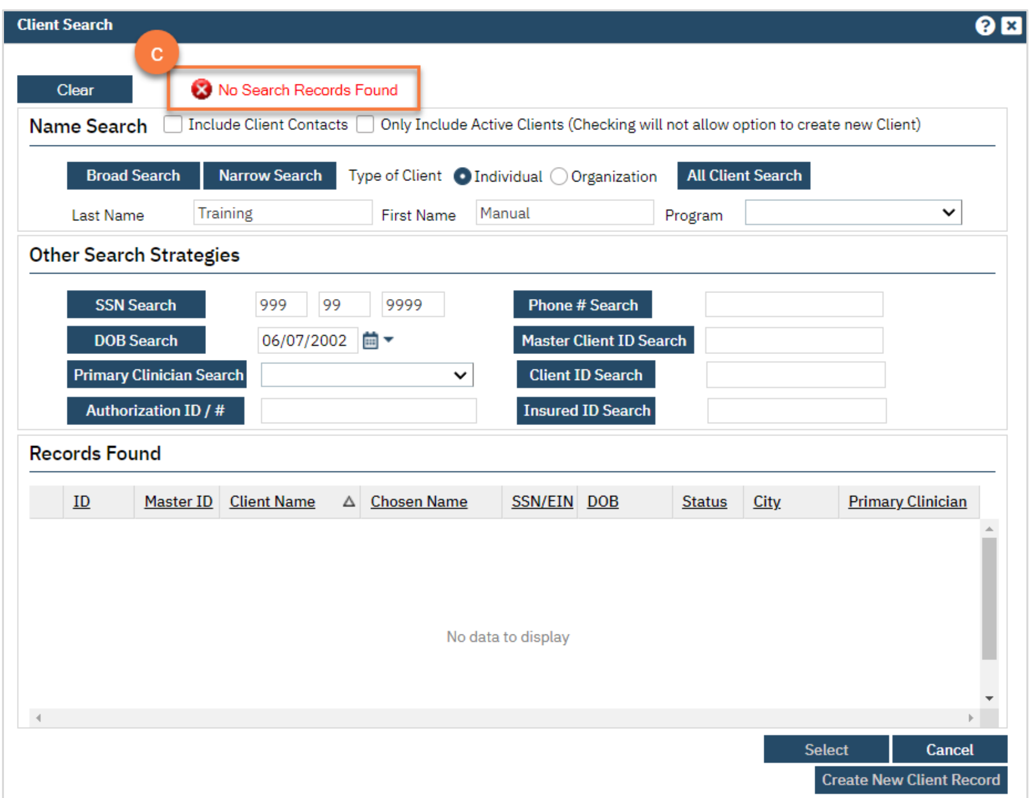
7. **Select the "Link/Create Client" button**. This will bring up the client search window, with a few extra buttons at the bottom.



   a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
   b. You must also **search by SSN and DOB** by clicking on those respective buttons.

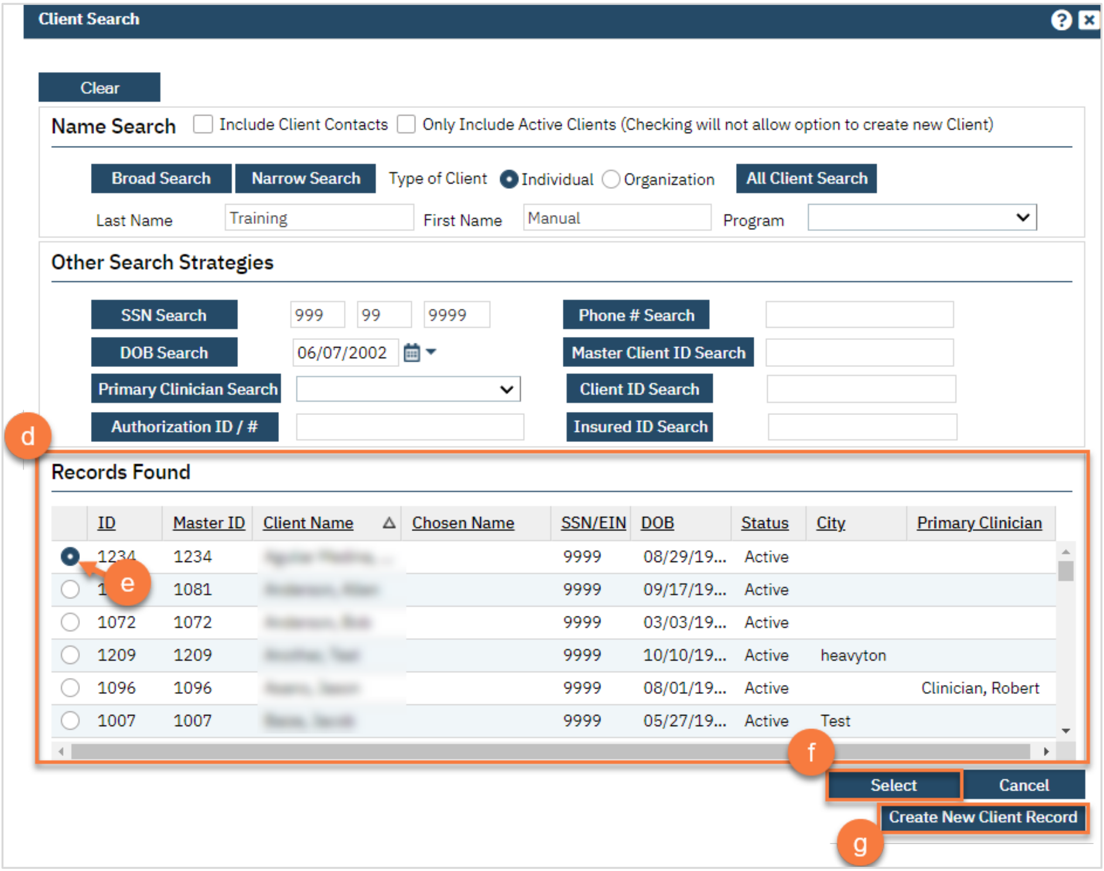


c. If no records are found based on the search you do, an alert will show at the top of the window.

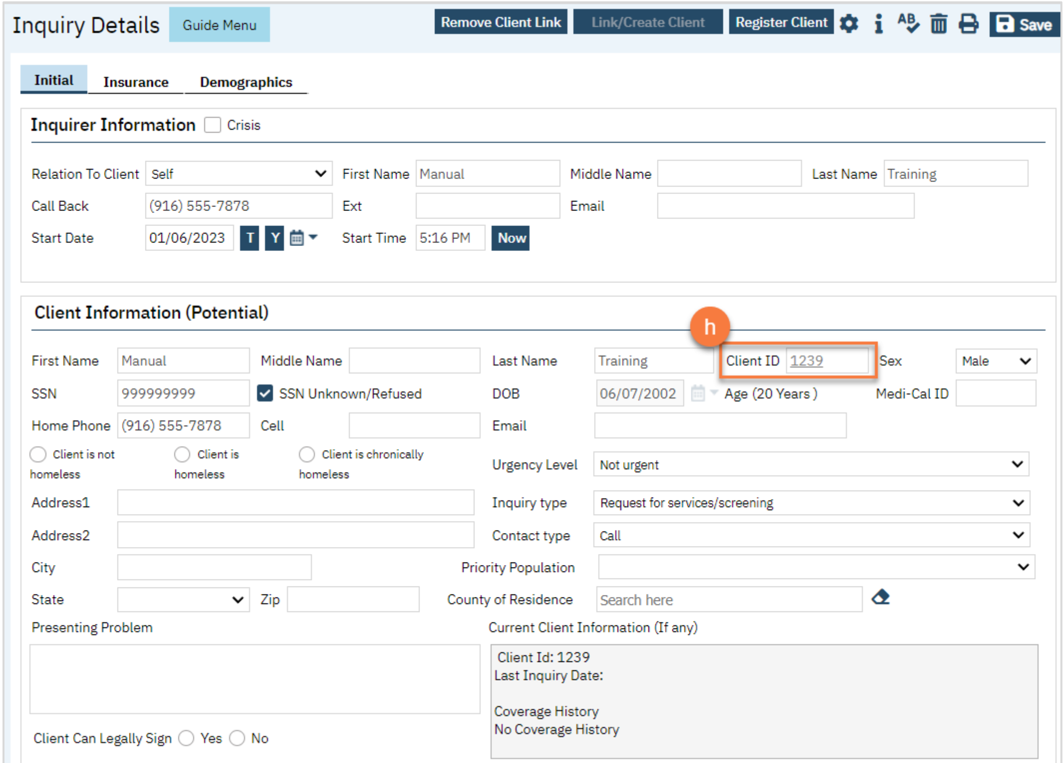


d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.

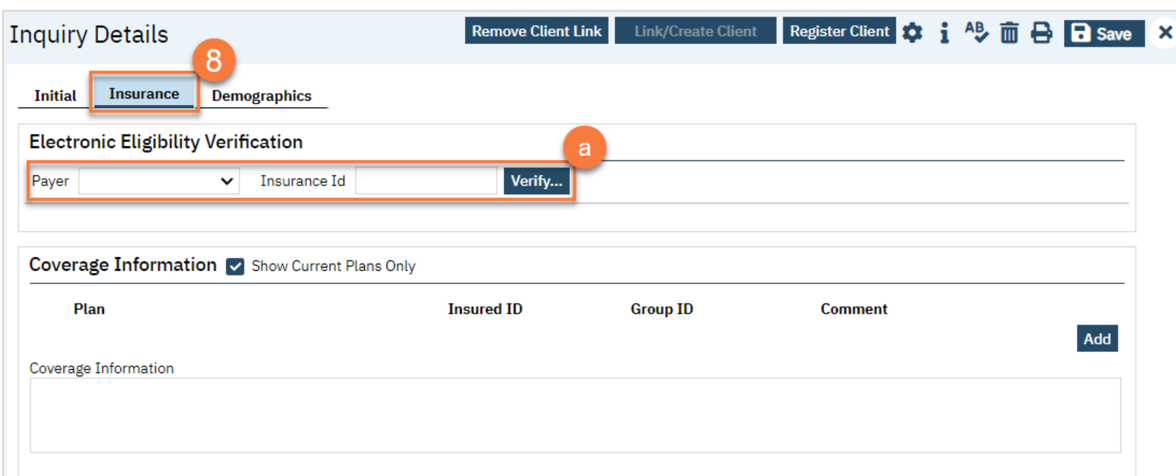
e. If the person is already a client in the system, **select the button next to the appropriate record.**
f. **Click "Select"** to link the Inquiry to the selected client.
g. If the person is not a client, meaning no records were found matching the client's information, **click "Create New Client Record."**



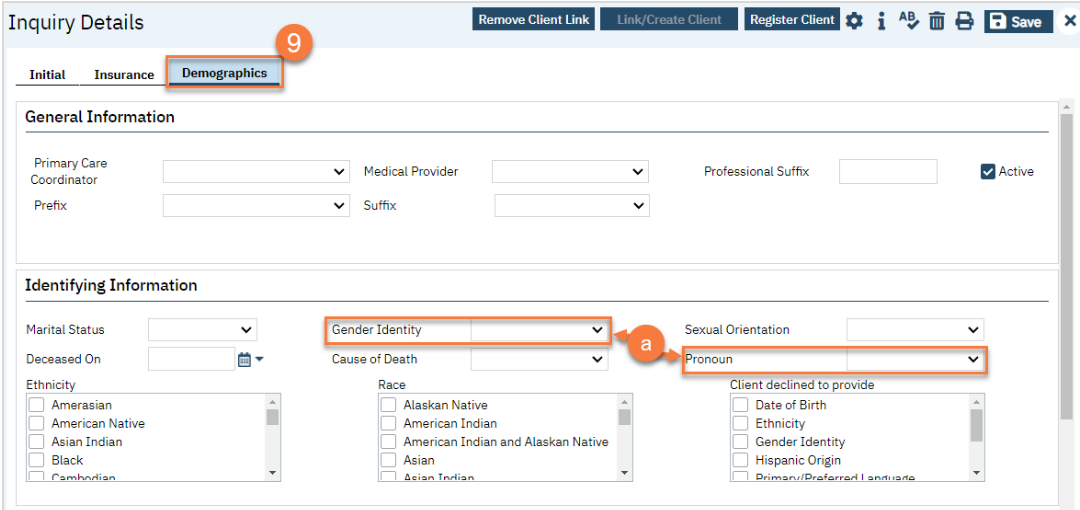
h. This will take you back to the Inquiry screen but now a client ID number will be added.



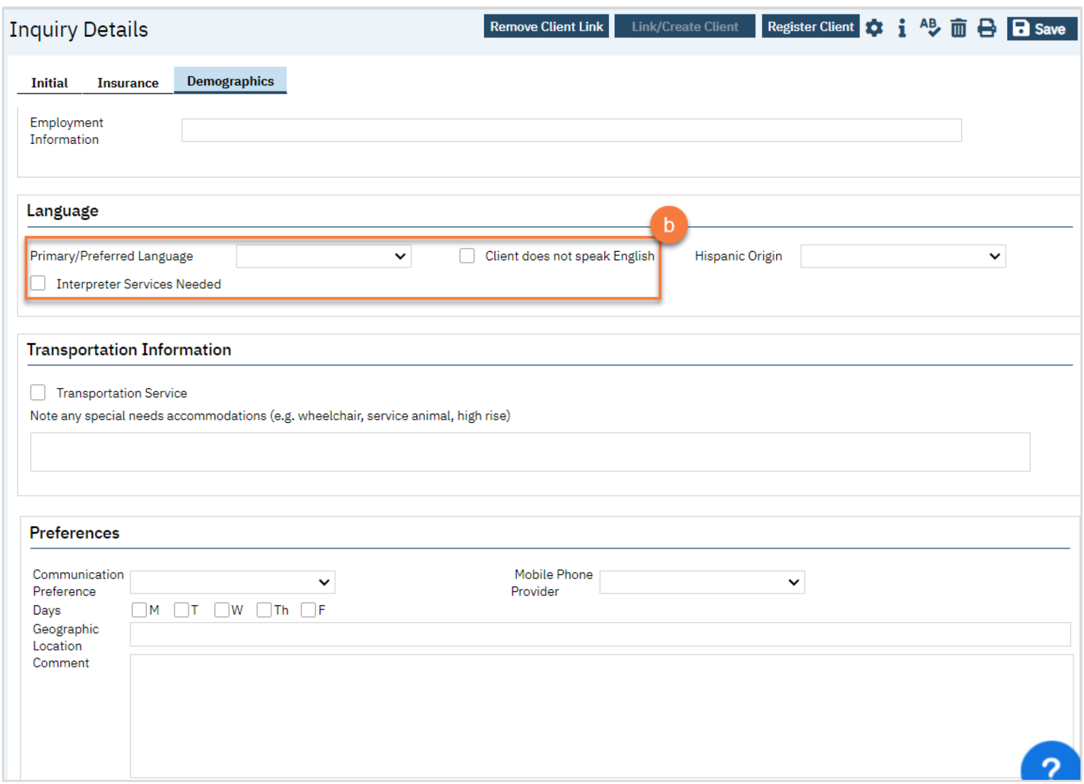
8. Click on the “Insurance” tab.
    a. **Select “Medi-Cal” from the “Payer” drop-down and enter the client’s Medi-Cal number (CIN) in the “Insurance ID” field. Click “Verify”** to verify the client’s Medi-Cal insurance.



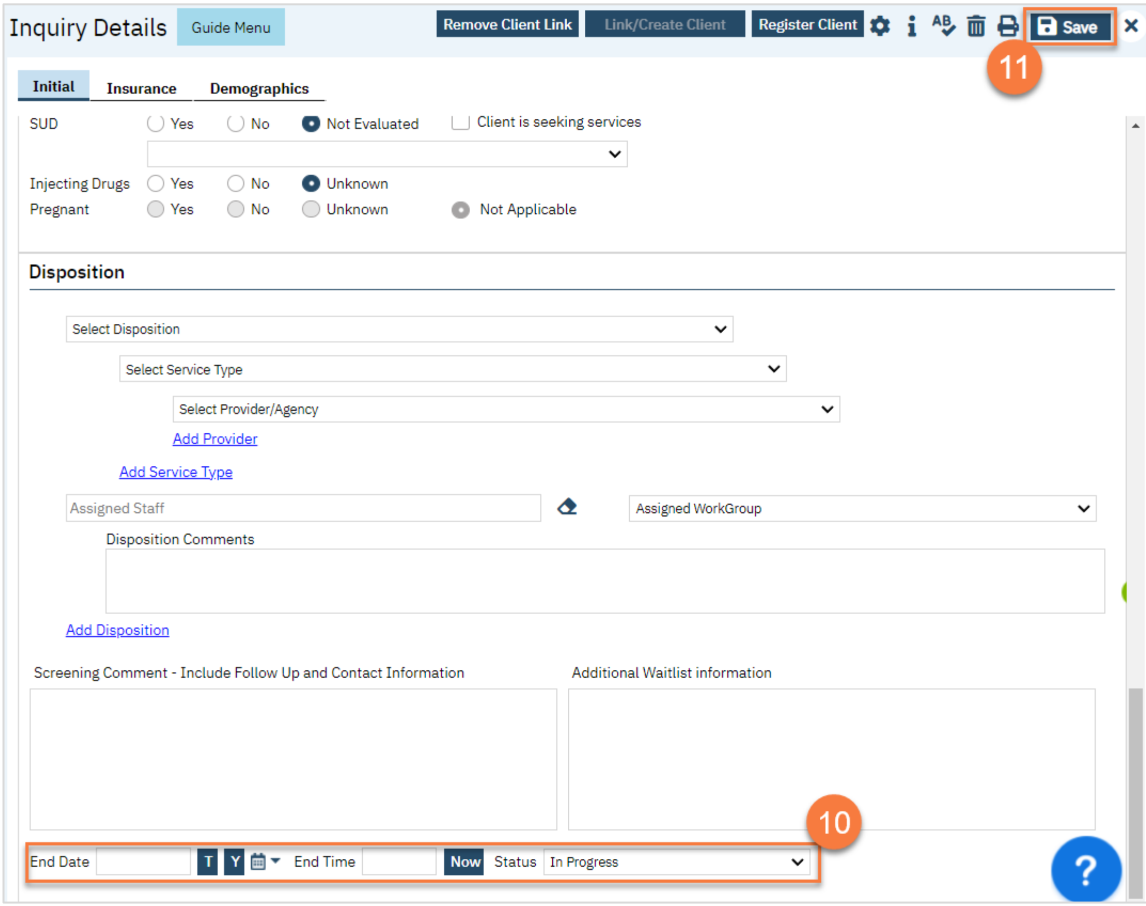
9. Click on the “Demographics” tab.
    a. We recommend **completing the “Gender Identity” and “Pronoun” fields** to ensure the person is not misgendered as additional staff engage with the client.



b. **Complete the "Primary/Preferred Language" field.** If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.



10. You may enter any additional information in any of the tabs, but none are required. Once complete, **enter the end date and time of the Inquiry and change the status to "Complete".** Once again, there are "T" (today) and "Now" buttons to make this easier.
11. **Click Save.** You may now close the Inquiry and move on to Screening.



What do I do when someone walks in for an assessment?

Walk-in assessments can skip the Inquiry and Screening steps and go straight to <u>Intake and Assessment</u>.

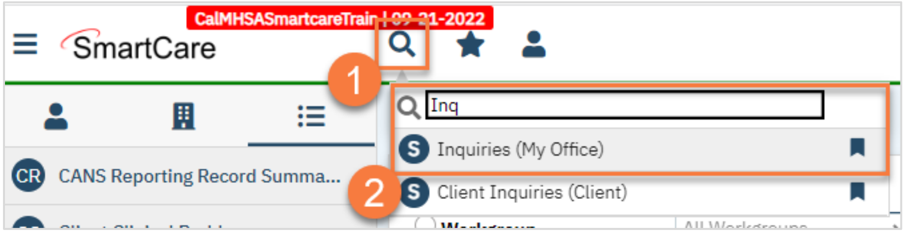
What do I do if someone calls a non-crisis line and says they're in crisis?

When someone calls a non-crisis line saying they're in crisis, transfer them immediately to crisis services per your county's policies and procedures. It's ok if you've started an inquiry. Simply save the inquiry. The crisis services staff can continue the inquiry from their computer.

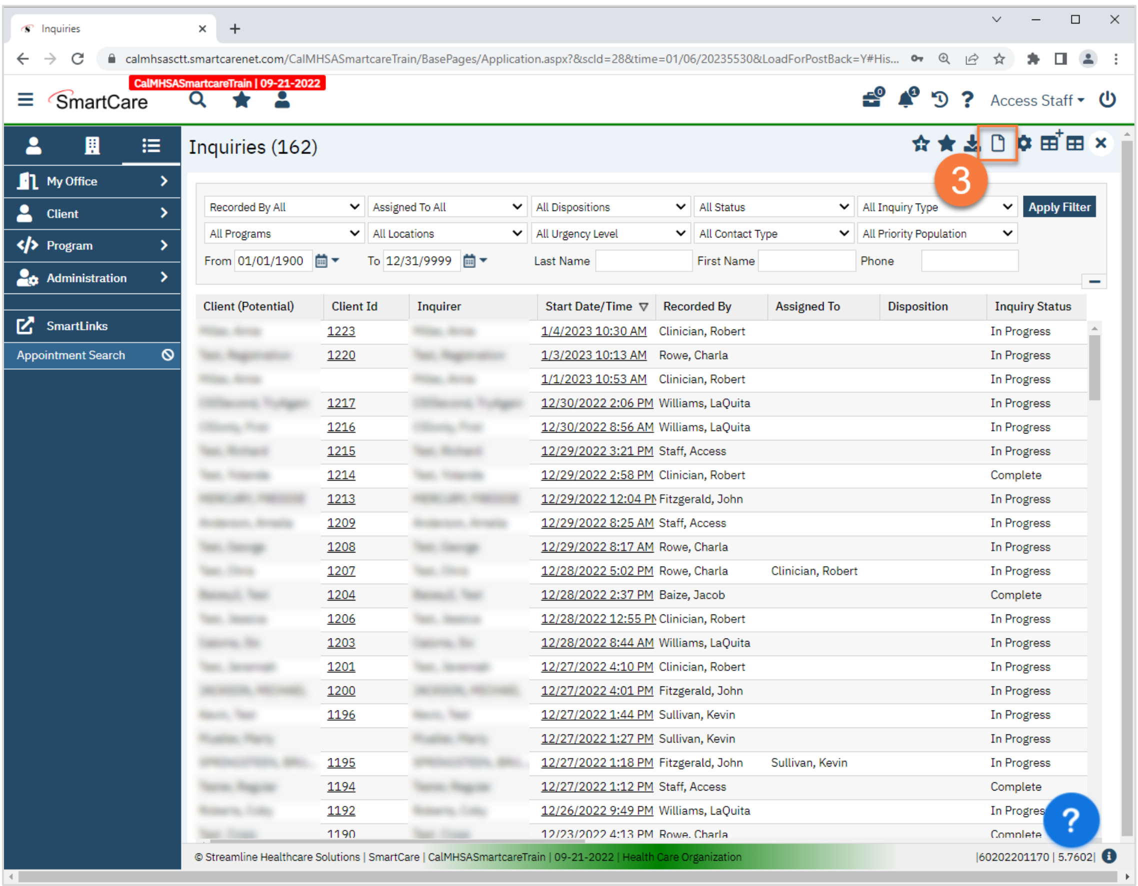
What do I do if someone calls requesting services, but I don't provide crisis or screening services?

Even if you don't provide screening or crisis services, you can still document the request for services. This is done on the Inquiry screen.

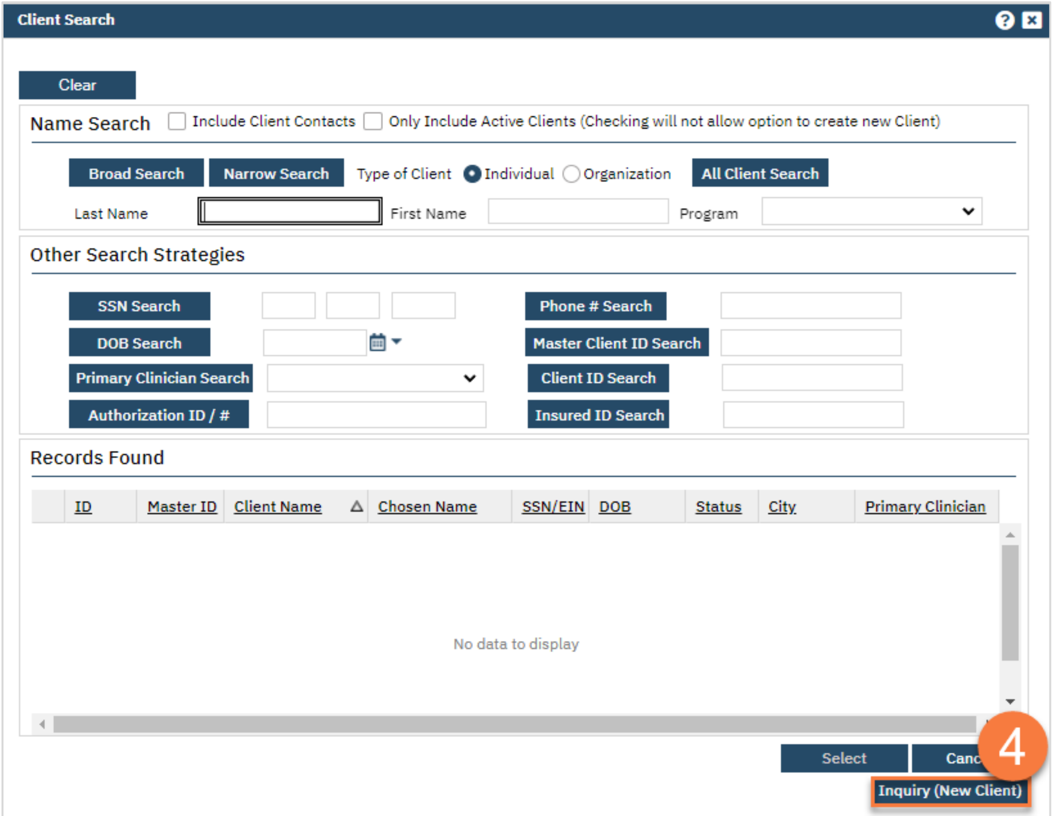
1. Search for the Inquiry screen using the search icon.
2. Select "Inquiries (My Office)"



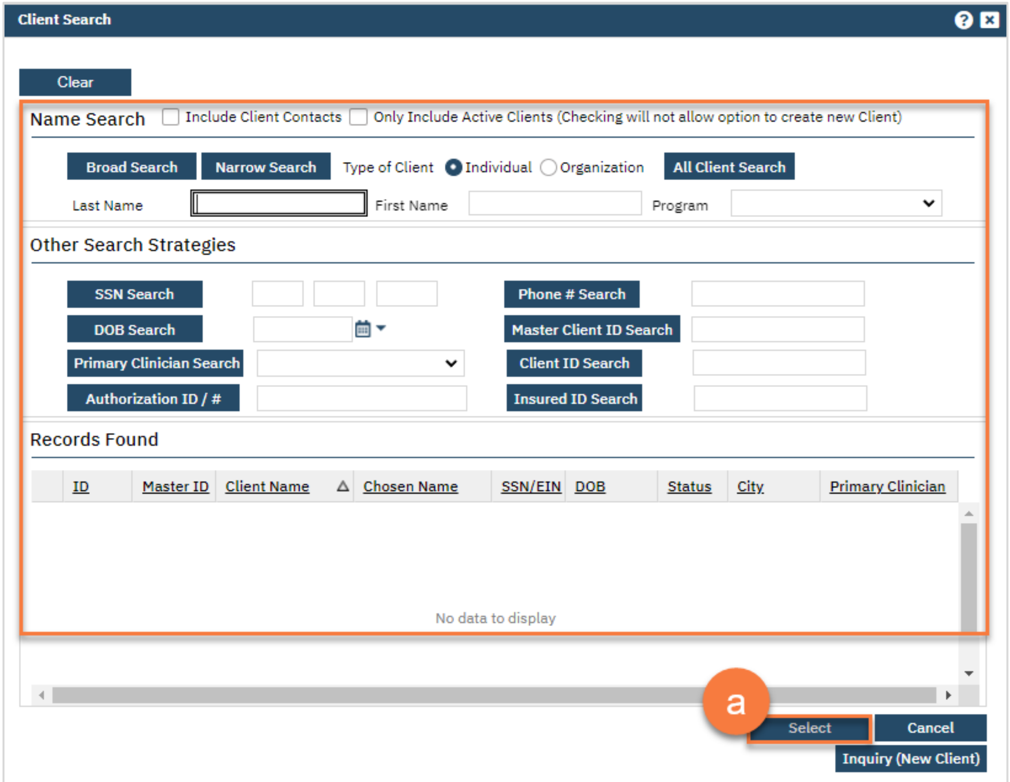
3. This will bring you to the Inquiries list page. **Create a new inquiry** by using the new icon.



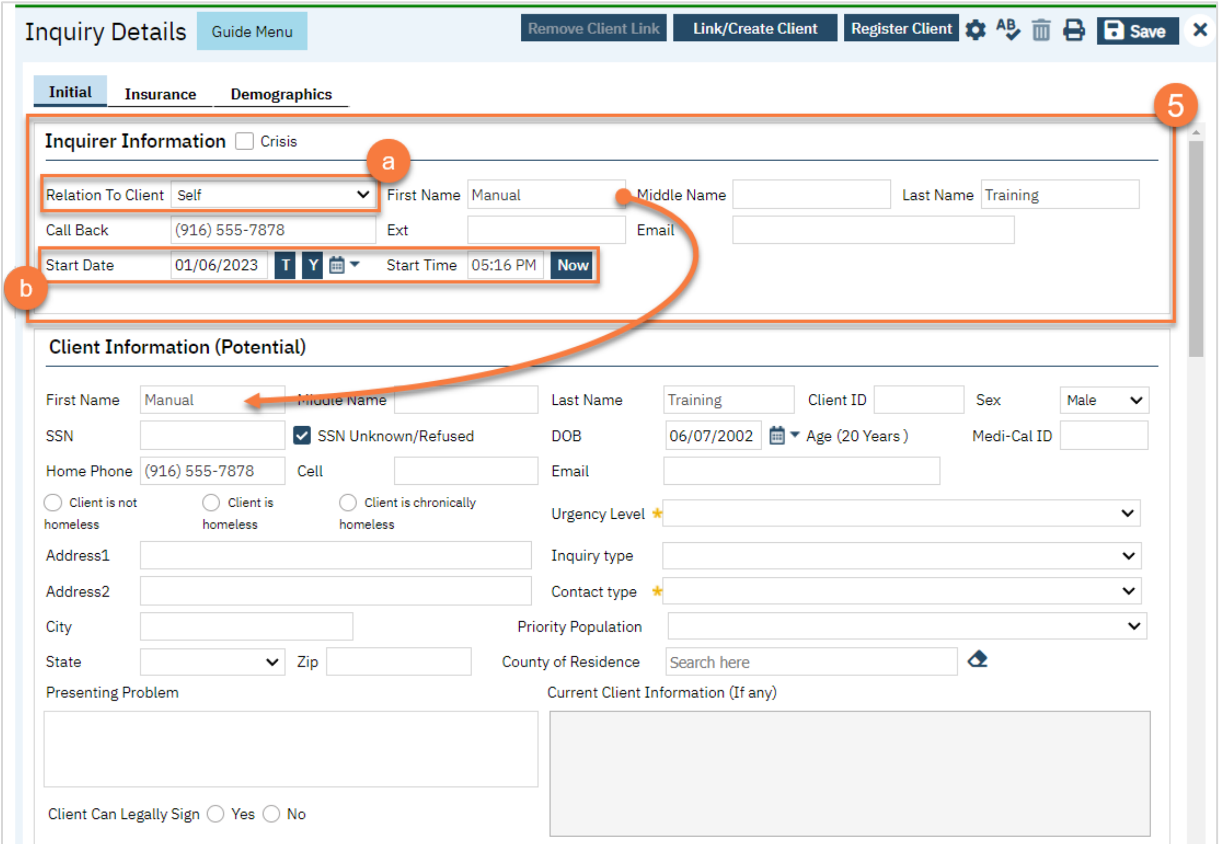
4. This will bring up the client search window. **You may search to determine if the person is a current client**. If person is a new client, or you cannot find them in the system, **click “Inquiry (New Client)”.**



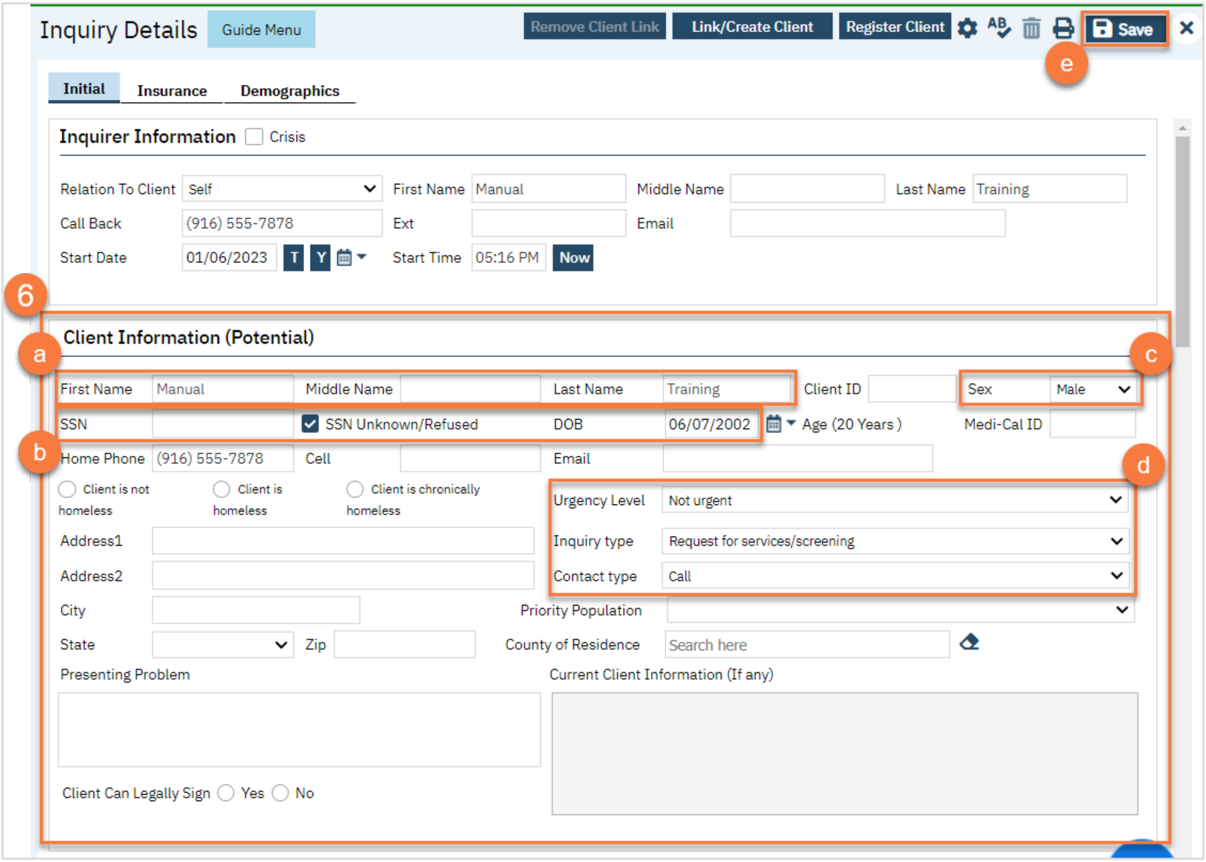
a. To search for a client, enter their name and click "Broad Search." You can also search by SSN by entering their social security number and clicking "SSN Search." You can do the same with date of birth (DOB), phone number, etc. If you find the person in the system, meaning they show in the Records Found section, click "Select" to bring their information into the Inquiry screen.



5. This brings you to the Inquiry Details screen. **Complete the information about the caller, or "Inquirer"**.
    a. If the client is requesting services for themselves, select "Self" under "Relation to Client." This way, as you enter the caller's information, it will push this information automatically into the "Client Information" section.
    b. Make sure to input the start date and time of the call. There are buttons for "T" (today) and "Now" to help make this quick and easy.



6. Complete the information about the potential client.
    a. **Complete the First Name and Last Name fields.** Middle Name is not required but can be added as necessary.
    b. **Complete the SSN and DOB fields.** This is for the client's social security number (SSN) and date of birth (DOB), respectively. If the client refuses to share, or doesn't know, you can simply check the box "SSN Unknown/Refused." Once saved, this will fill in the SSN with "999999999", which is SmartCare's version of "no SSN". These fields can be changed in the future if necessary.
    c. **Complete the Sex field.** This field can be changed in the future if necessary.
    d. **Complete the Urgency Level, Inquiry type, and Contact type fields.** The options for each field are listed in the tables below. This includes a description of when to use each option.
    e. **Click Save.**



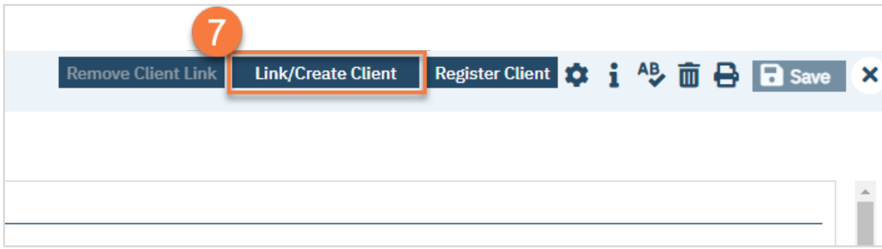
Urgency Level	Description/Use Case	Timelines
Emergent	Use if the call is an emergency	Addressed immediately
Not Urgent	Use if the call is a routine request for services	Appointment within 10 business days
Urgent	Use if the call is an urgent request	Appointment within 72 hours

Inquiry Type	Description/Use Case
Requests for services/screening	Use when the reason for the call is a request for new services
Crisis	Use when the reason for the call is for crisis services
Information	Use when the reason for the call is for information
Discharge/Transition Coordination	Use when the reason for the call is for another provider to coordinate transition of care to/from your agency
Jail Diversion	Use when the reason for the call is related to Jail Diversion programs
Consultation	Use when the reason for the call is for an outside provider seeking a consultation
Other	Use when the reason for the call is not addressed by any of the above

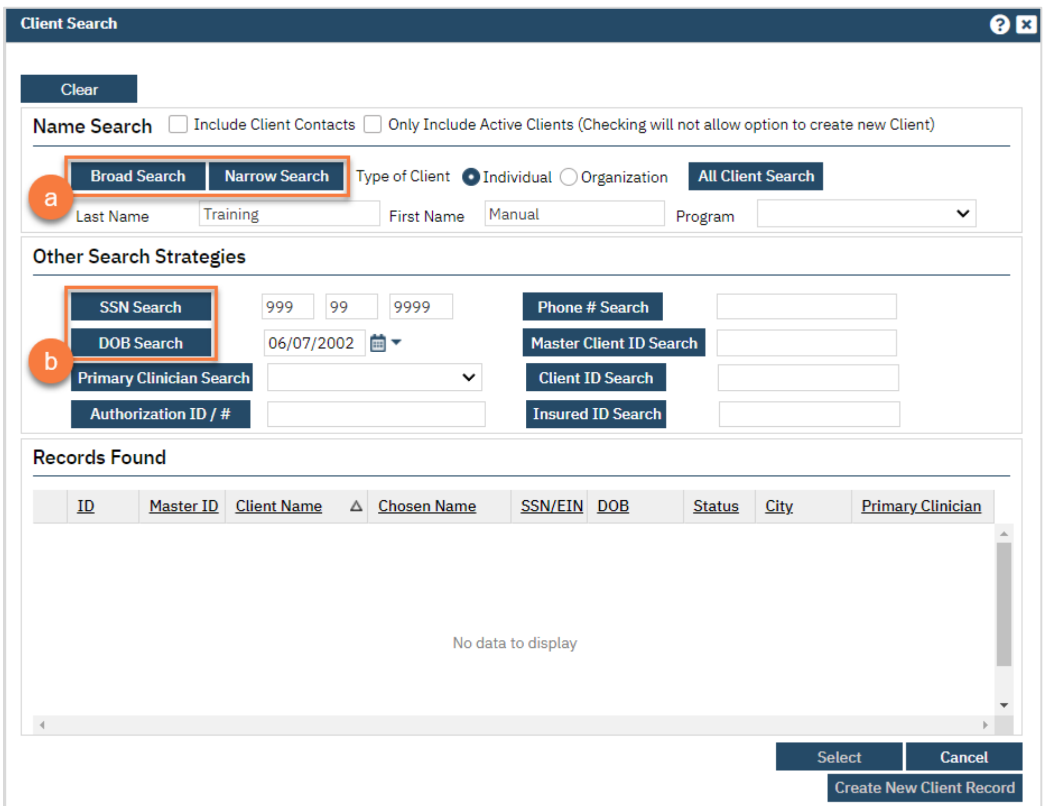
Contact Type	Description/Use Case
Call	Use when the inquiry was complete via telephone
Face to Face	Use when the inquiry was completed via in-person, such as a walk-in
Form	Use when the inquiry was completed via form, such as a referral that was sent to the county

Teleconference	Use when the inquiry was complete via teleconference, such as Zoom, FaceTime, Webex, or other video-audio conferencing software

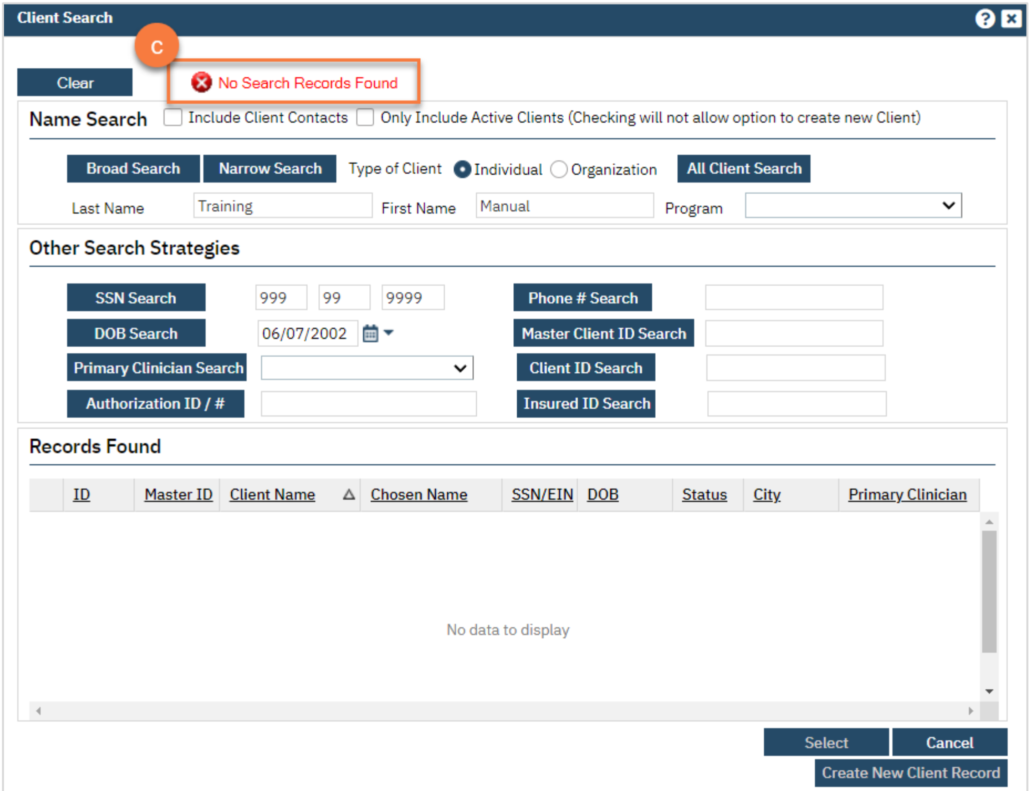
7. **Select the "Link/Create Client" button**. This will bring up the client search window, with a few extra buttons at the bottom.



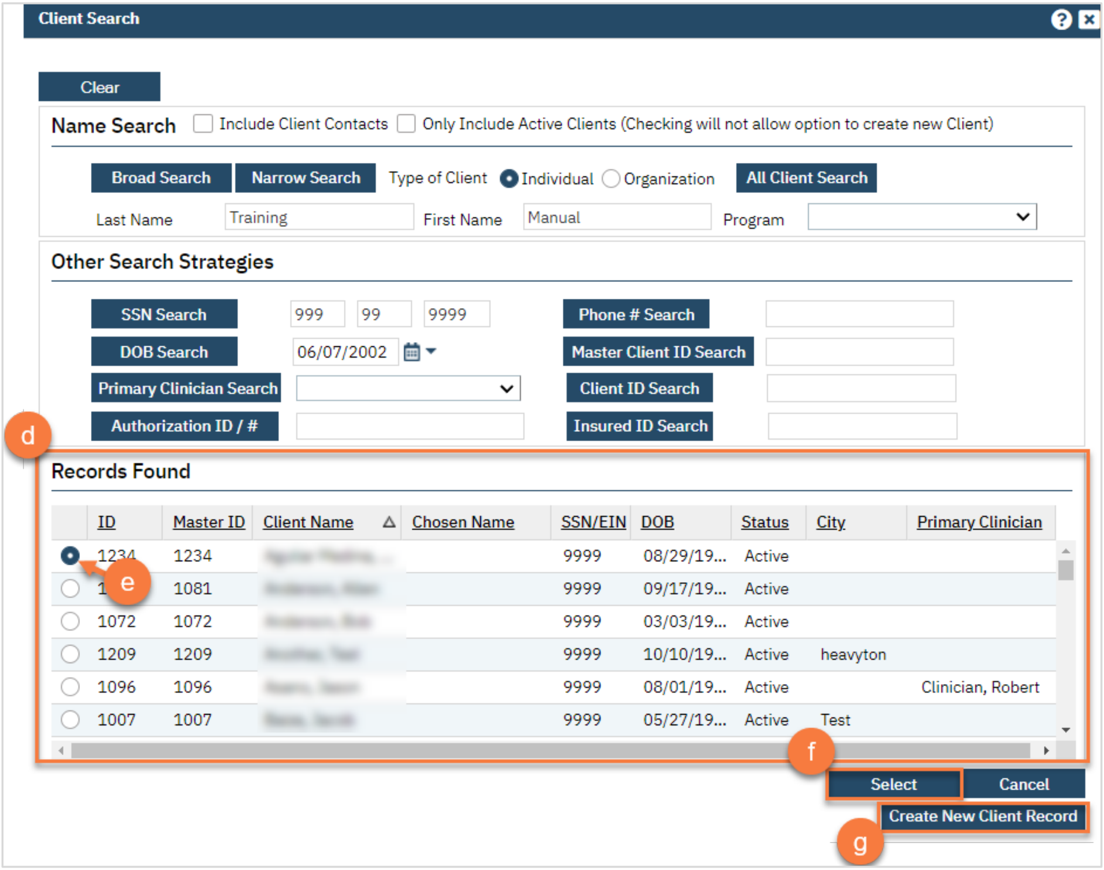
   a. You must **search by name** by clicking on either "Broad Search" or "Narrow Search".
   b. You must also **search by SSN and DOB** by clicking on those respective buttons.



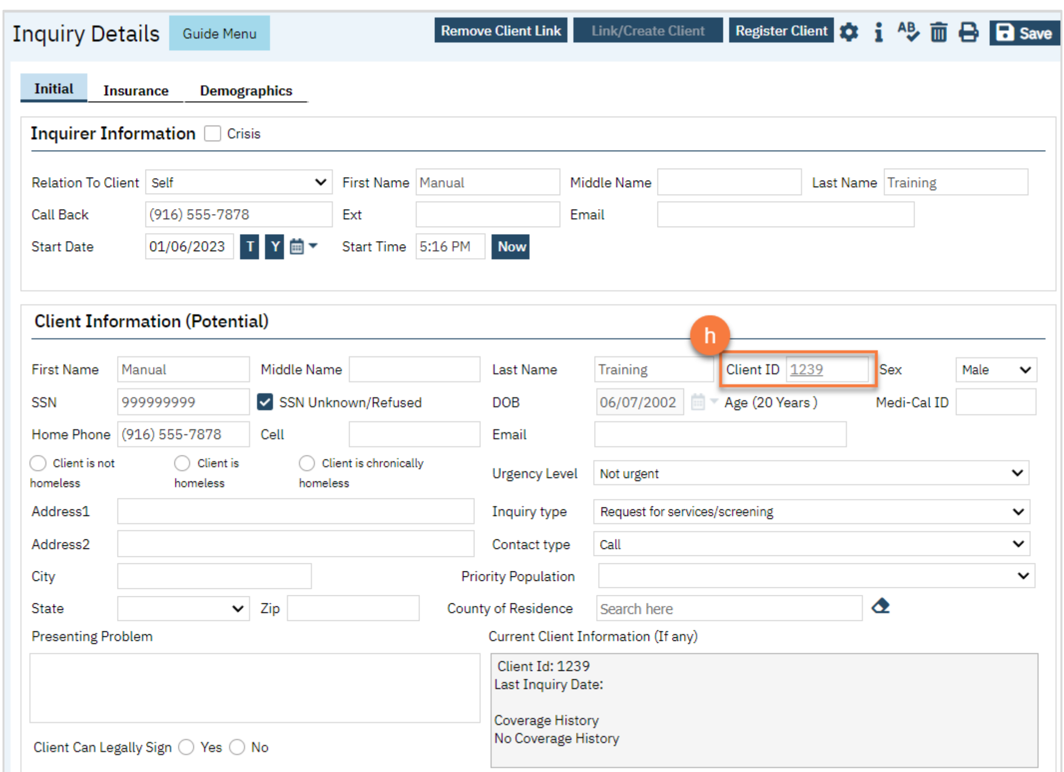
   c. If no records are found based on the search you do, an alert will show at the top of the window.



d. Any search results will show in the "Records Found" area. **Review the Records Found** to determine if the person is already in the system as a client.
e. If the person is already a client in the system, **select the button next to the appropriate record.**
f. **Click "Select"** to link the Inquiry to the selected client.
g. If the person is not a client, meaning no records were found matching the client's information, **click "Create New Client Record."**

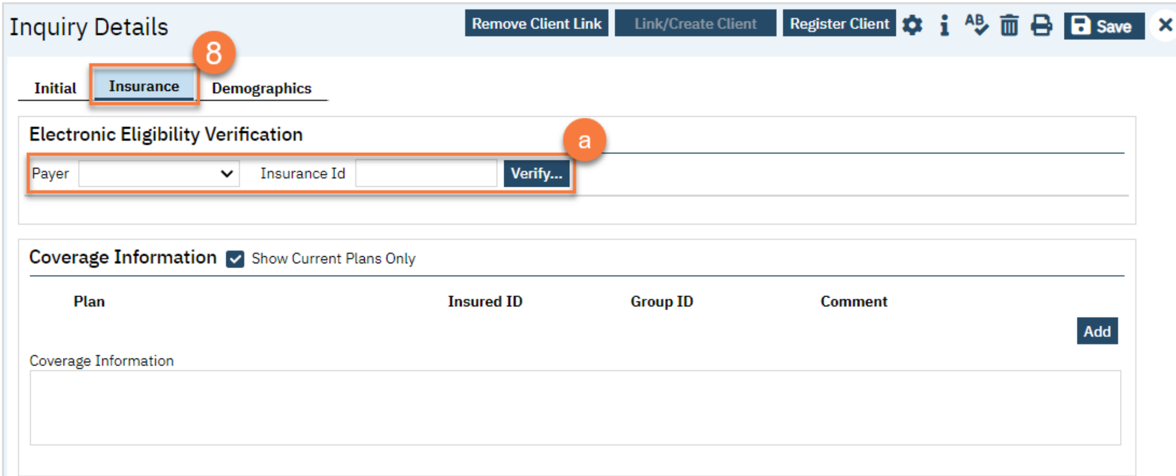


h. This will take you back to the Inquiry screen but now a client ID number will be added.



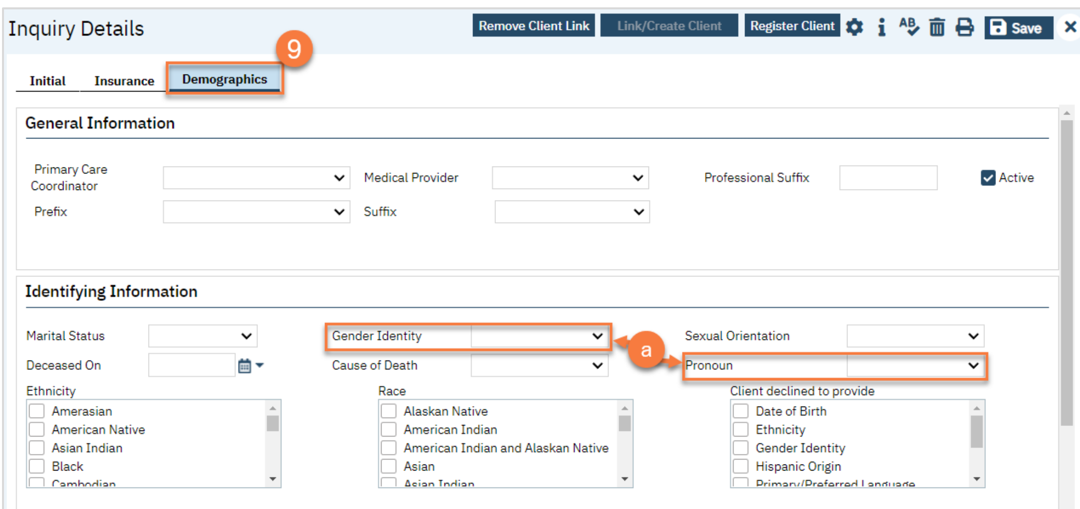
8. **Click on the “Insurance” tab.**

a. **Select "Medi-Cal" from the "Payer" drop-down and enter the client's Medi-Cal number (CIN) in the "Insurance ID" field. Click "Verify"** to verify the client's Medi-Cal insurance.

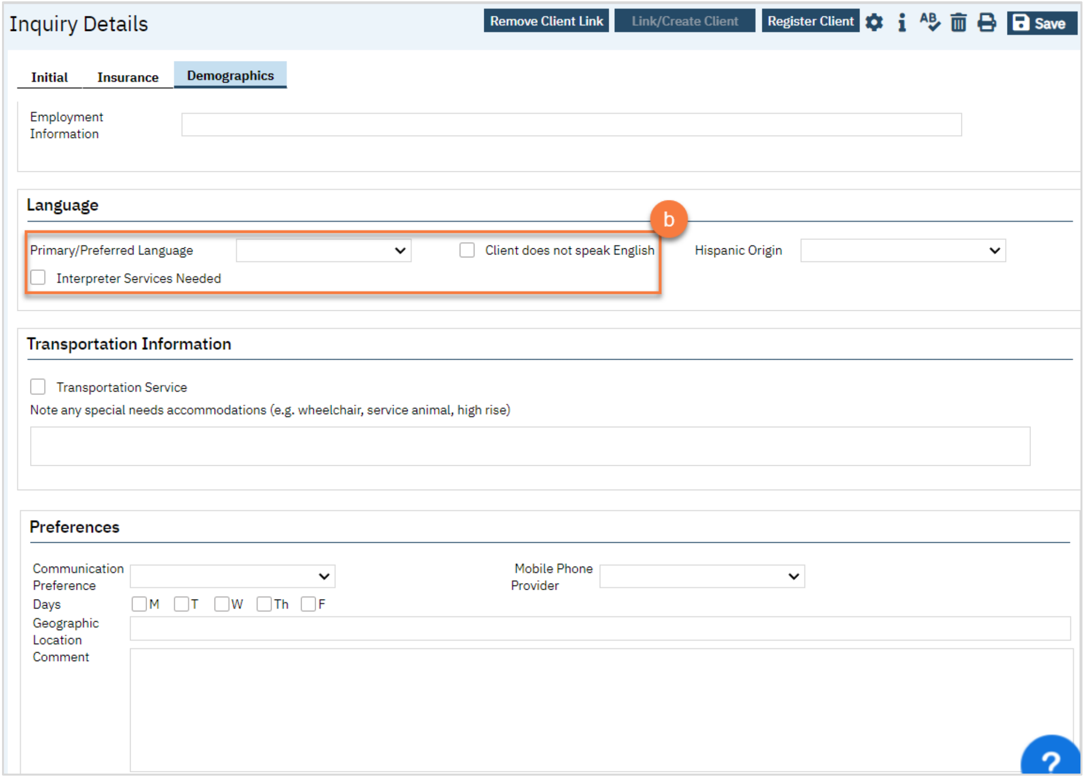


9. **Click on the "Demographics" tab.**

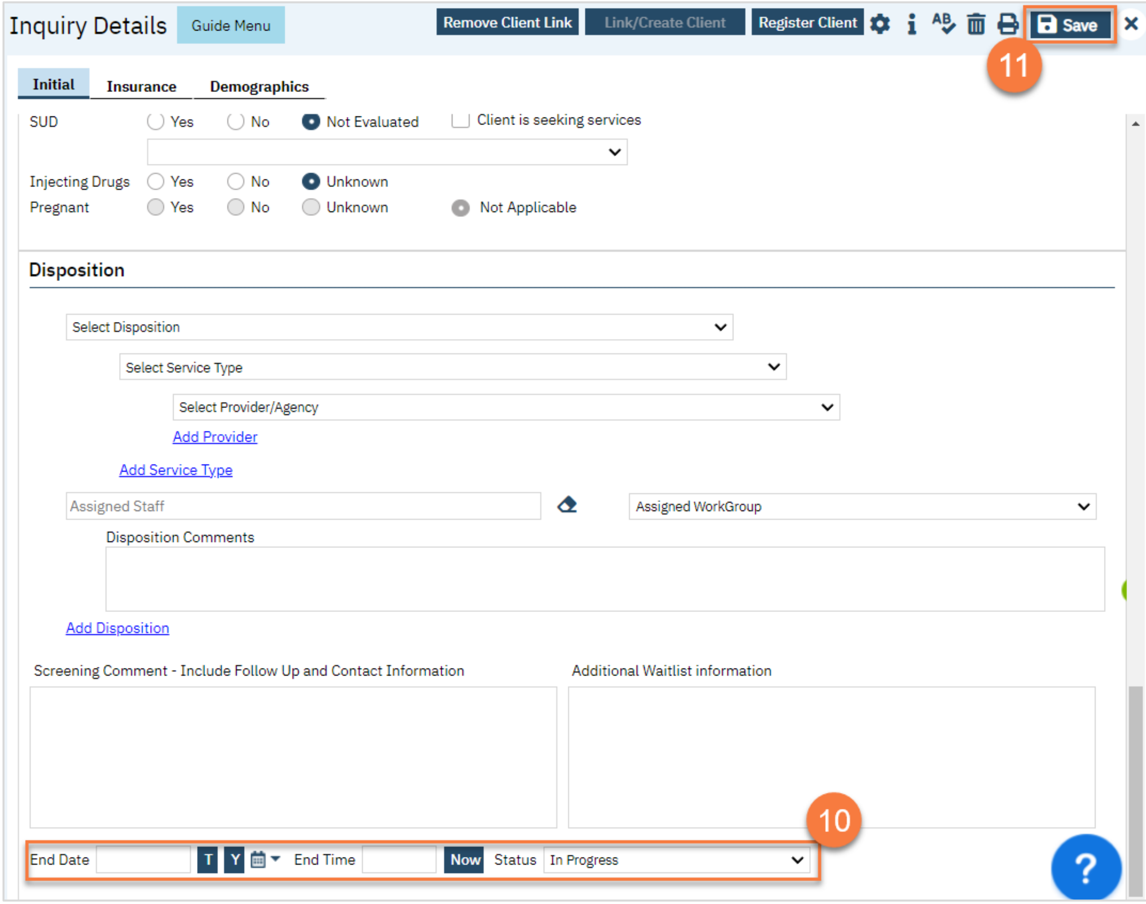
a. We recommend **completing the "Gender Identity" and "Pronoun" fields** to ensure the person is not misgendered as additional staff engage with the client.



b. **Complete the "Primary/Preferred Language" field.** If the client does not speak English or requires an interpreter, make sure to check the appropriate checkbox.



10. You may enter any additional information in any of the tabs, but none are required. Once complete, **enter the end date and time of the Inquiry.** Once again, there are "T" (today) and "Now" buttons to make this easier. **Leave the status as "In Progress".**
11. **Click Save.** You may now close the Inquiry. Your Access Team will likely have procedures to monitor the Inquiries list page to address any that are in progress. If your county does not have these procedures, we recommend that you notify the appropriate person per your county's procedures.

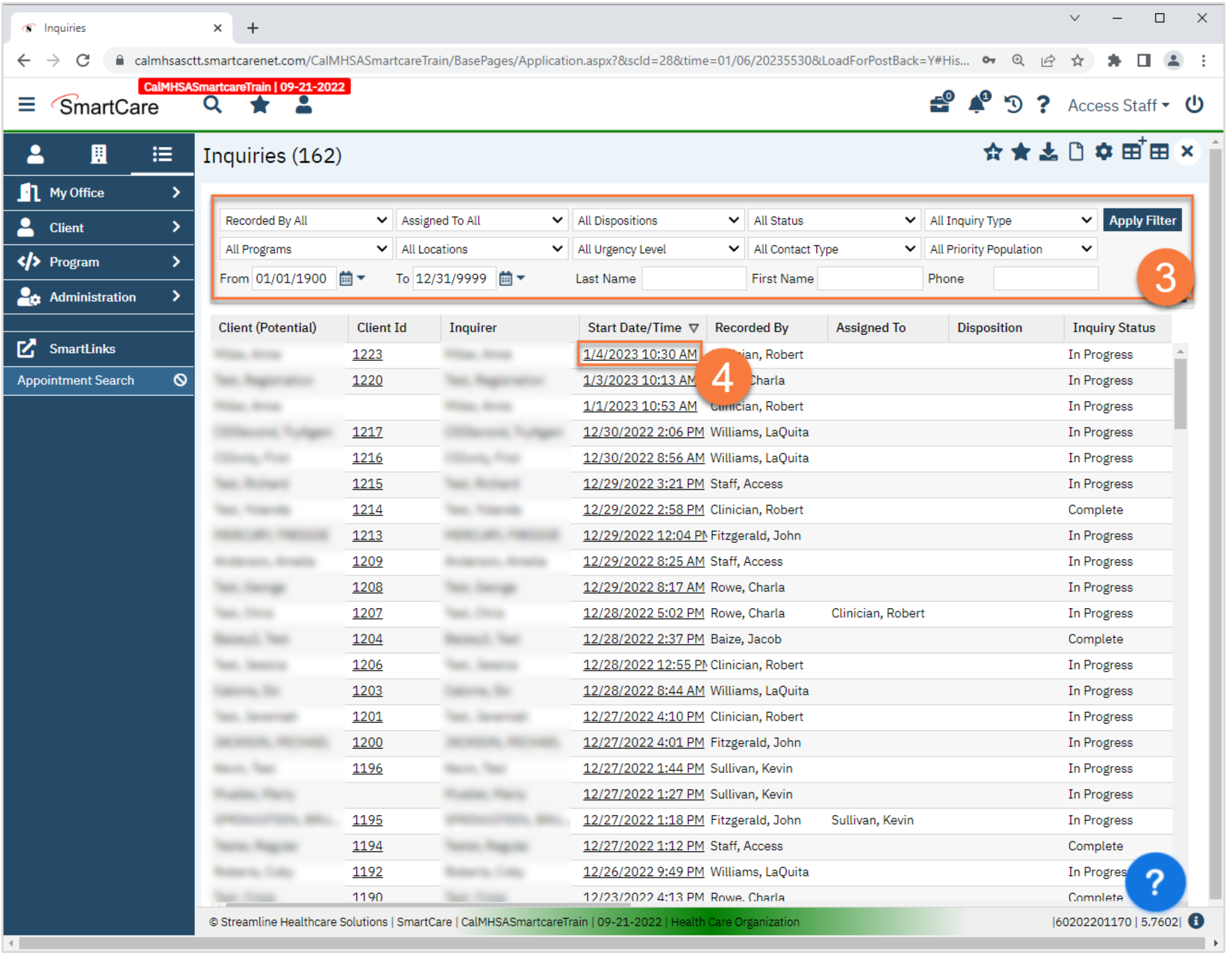


How can I view requests for services that are pending?

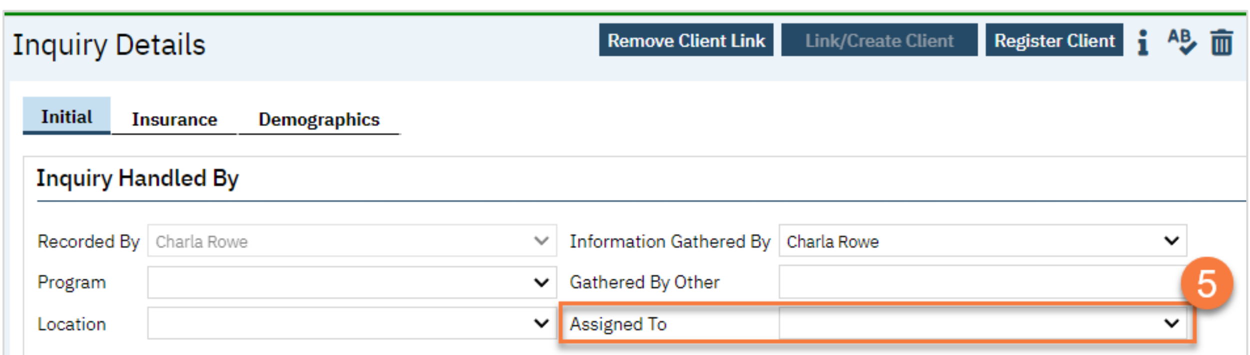
Viewing all inquiries, both completed and pending, is done in the Inquiries list page.

1. **Search for the Inquiry screen** using the search icon.
2. **Select "Inquiries (My Office)"**

3. This will bring you to the Inquiries list page. **Use the filters as necessary**, such as filtering the status to show only "In Progress". The "Recorded By" column indicates who created the inquiry. The
4. To see the details of an inquiry, **click on the link in the "Start Date/Time"** column.



5. Once in the Inquiry Details screen, you can assign the inquiry to a staff member by navigating to the "Inquiry Handled By" section and **use the "Assigned Staff" field**. This field shows on the Inquiries list page, meaning staff can sort by inquiries that are assigned to them.



Privacy and Consents

Information in SmartCare is generally considered confidential. There are multiple laws and regulations that programs must follow, depending on their specific treatment services. However, the client can provide consent to share information. This section reviews these topics, as well as the documents utilized to record a client's consent.

Clinical Access Data Group (CDAG)

SmartCare includes both mental health and substance use disorder treatment records. In order to abide by Title 42 of the Code of Federal Regulations, part 2 (42 CFR), SmartCare uses Clinical Access Data Groups, or CDAG, to limit what users can see. Your CDAG will be determined by the programs you work in and are set up by your system administrator.

Most of the time you are creating a document in the system, you'll have to select which program that document is associated with. This allows the system to limit viewability of client documents based on a user's CDAG.

You'll still be able to search for any client, as some may not be open to any programs yet, and some might be open to programs that you don't have access to. This minimizes the option of creating duplicate clients in SmartCare. However, once in a client's chart, you'll only be able to see information related to programs that are included in your CDAG.

How do I know what CDAG I have?

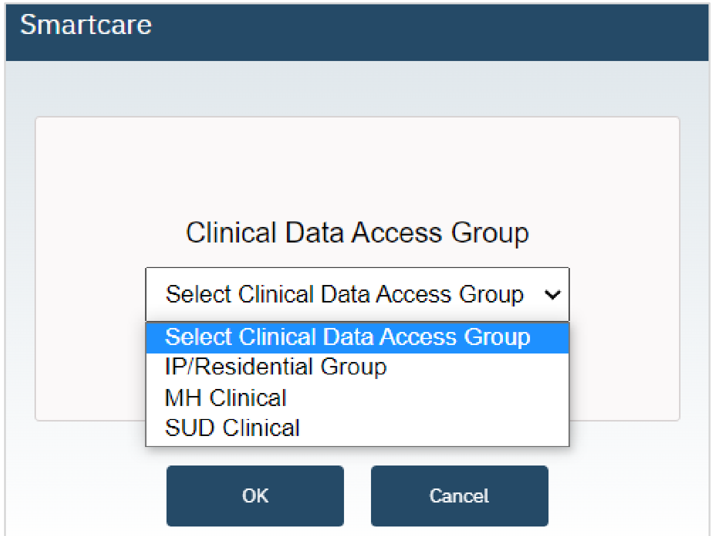
Your System Administrator will set up your CDAG and which programs you are able to see. CalMHSA recommends three basic CDAG options:

1. Mental Health CDAG – Includes all Mental Health programs; would be assigned to mental health staff.
2. Substance Use Disorder CDAG – Includes all Substance Use treatment programs; would be assigned to substance use treatment staff.
3. Administration CDAG – Includes all programs in SmartCare; would be assigned to any staff that provide administrative support, such as billing, medical records, quality improvement, and management.

Your county may employ additional groupings, based on how your county is set up. They may also limit which programs you are able to see, even if they're within the same CDAG.

What happens if I work in both SUD and MH programs?

If you work in multiple programs, your system administrator will assign you multiple CDAGs. In this case, when you log in you'll select which CDAG you're logging in under. This will ensure that you're only able to see client information based on the role you're currently serving. This would also be the case if you work at two different agencies that have access to SmartCare.



What if the client wants me to be able to talk to other programs/people/agencies?

Best practices mean coordinating care with all of a client's providers, as well as other agencies and persons the client is working with. However, due to privacy rules, there are some limitations on what a provider can share with these entities. This is all based on the client's preferences. The client can consent to you sharing treatment information. This is generally known as a Release of Information or an Authorization to Disclose Protected Health Information. Historically, each entity you want to exchange information with requires a separate Release of Information/Authorization to Disclose Information. This is still the case when you're exchanging information with an agency or person that doesn't have access to your county's instance of SmartCare. However, CalMHSA has created a disclosure authorization that encompasses all persons and agencies who have access to your county's instance of SmartCare. If signed, this allows county programs to better coordinate care for the client.

Note that this Coordinated Care Consent only authorizes the exchange of information within your county's instance of SmartCare. Other counties using SmartCare are not included in this authorization, nor are agencies who also use their own instance of SmartCare. This consent also does not authorize the exchange of information with all providers or agencies the client is working with. Standard Releases of Information/Authorizations to Disclose Information are needed in these cases.

Redisclosure: Just because you have access to 42 CFR information because the client signed the Coordinated Care Consent does NOT give you permission to redisclose information from SUD programs.

What happens when a client signs the Coordinated Care Consent?

By default, SmartCare enforces privacy regulations, including HIPAA and 42 CFR. This means that people working in mental health programs are not able to see any of the client's treatment information for substance use programs and vice versa. This limitation is enforced by each user's CDAG. In essence, there is a wall between CDAGs.

When a client signs the Coordinated Care Consent, this wall is removed. Users will be able to see *all* the client's treatment information, regardless of their CDAG. This includes historical information and future appointments. You'll still be required to select your program when creating a new document. This is to ensure that all documents are appropriately sorted in case the client revokes their consent, as is their right.

What happens when a client revokes their Coordinated Care Consent?

When a client has signed a Coordinated Care Consent, all SmartCare users can see all of the client's information. Basically, the CDAG rules drop, allowing users to view information regardless of their CDAG. When a client revokes their Coordinated Care Consent, the system will re-impose all CDAG rules. This means that information you previously were able to view will no longer be visible to you. You won't see any redaction marks; you simply won't be able to find any indication that the information was ever in the system.

Will I be alerted if a client revokes a consent?

You will not be alerted if a client revokes a Coordinated Care Consent, as that would defeat the purpose of keeping information separate. However, you will no longer be able to see information outside of your CDAG.

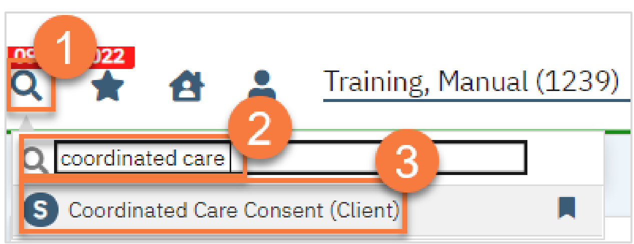
If the client revokes a standard Release of Information/Authorization to Disclose Confidential Information (ROI/ADCI), you can create a flag to notify other treatment team members that the client no longer allows sharing with that entity. They will only be able to see information in their CDAG, which may not include your flag or the ROI/ADCI.

Coordinated Care Consent & Authorizations to Disclose Confidential Information

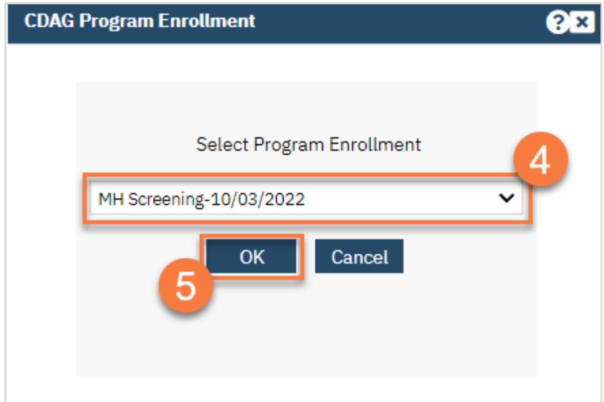
In this section, we will cover the Coordinated Care Consent, which allows sharing amongst SmartCare users, and the Release of Information, also known as an Authorization to Disclose Confidential Information, which allows sharing with non-SmartCare users.

How do I complete a Coordinated Care Consent?

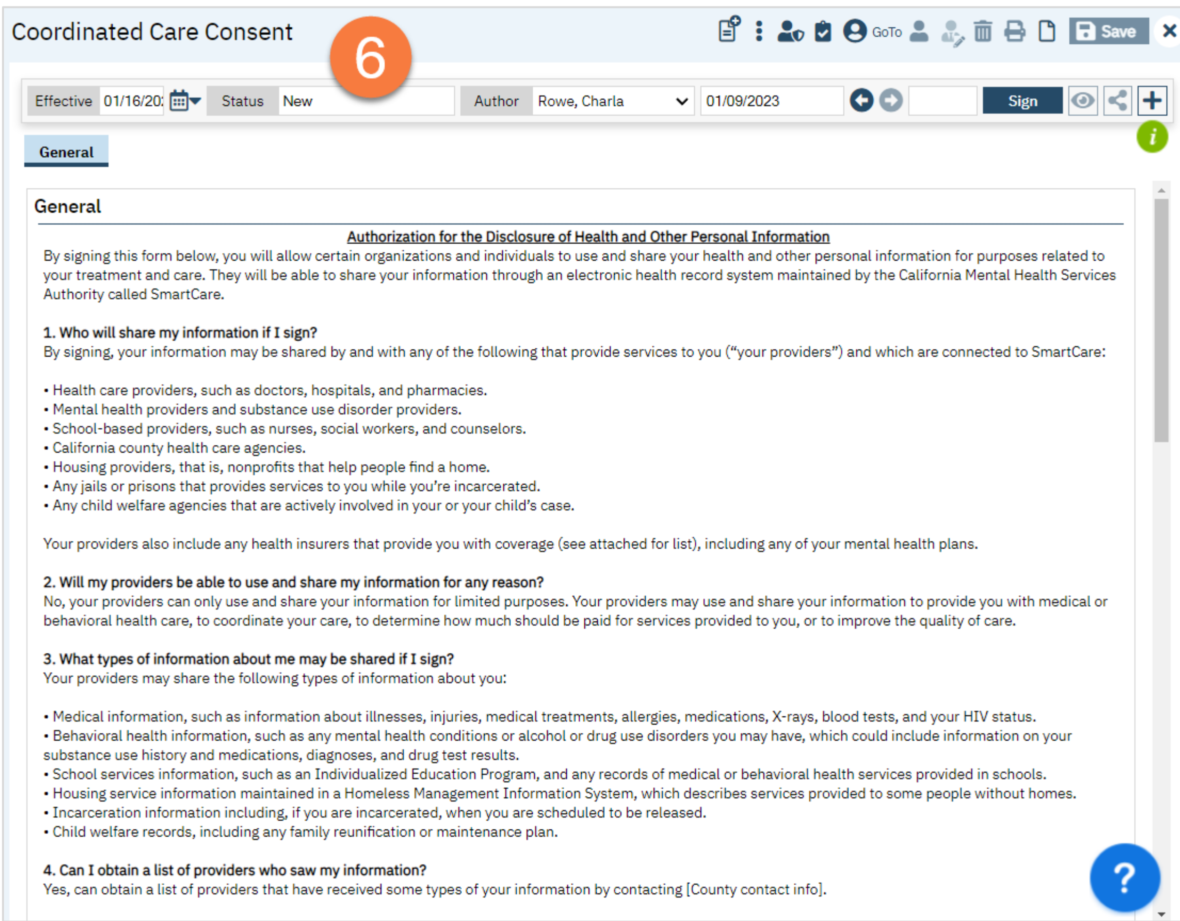
1. You must first have the client open, **click the Search icon**.
2. **Type Coordinated Care Consent** into the search bar.
3. **Click to select Coordinated Care Consent (Client).**



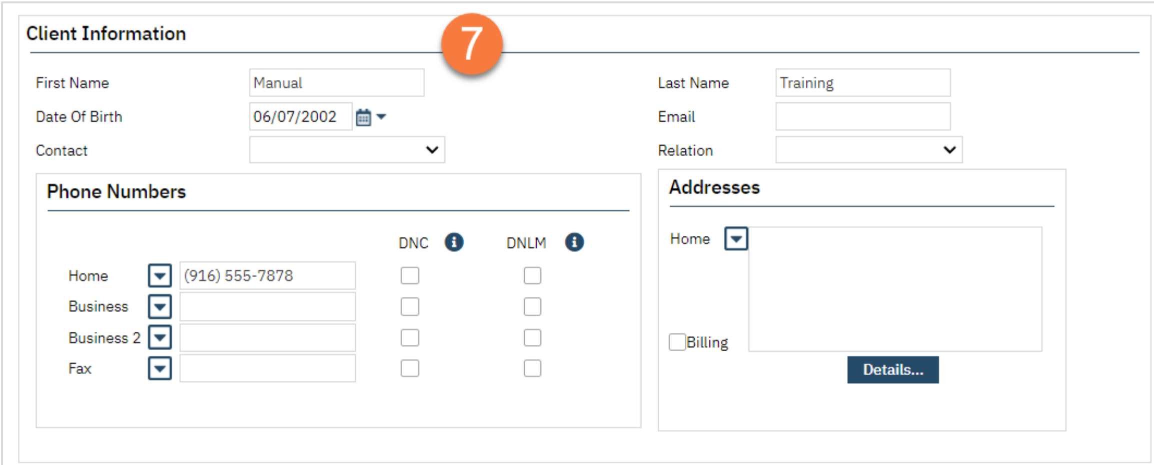
4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
5. **Click OK** to continue.



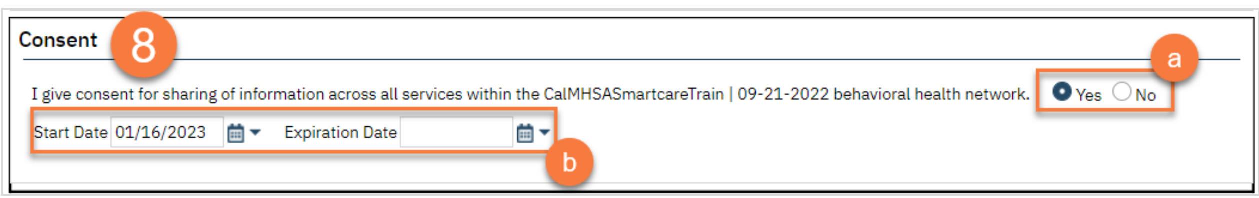
6. Most of the consent is wording. **Review this with the client**.



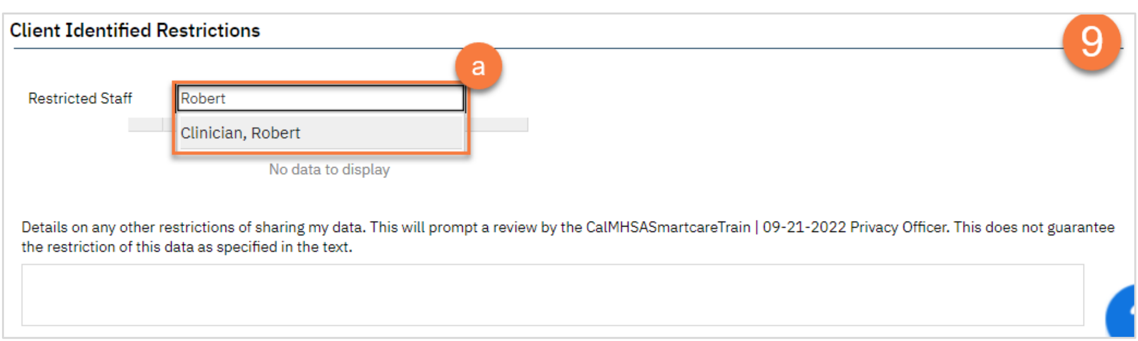
7. The Client Information section will pull information from the Client Information screen. You do not need to add any information here. If you need to update the information, we recommend doing that in the Client Information Screen.



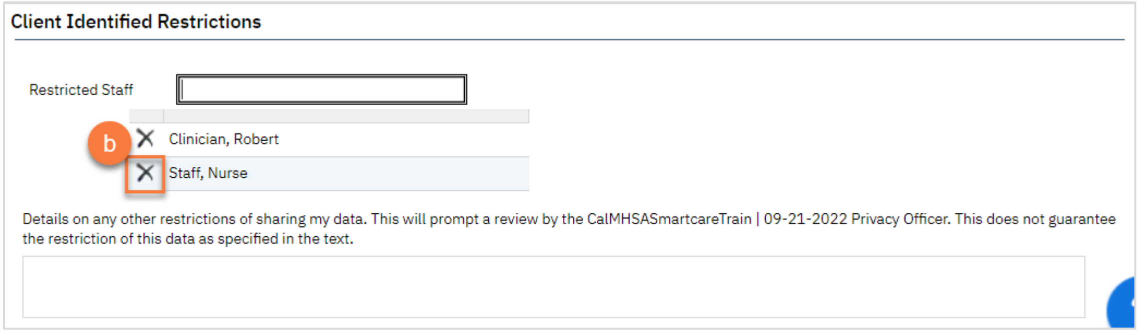
8. In the Consent section, the client should indicate whether they want to consent to sharing information within SmartCare or not.
    a. Selecting "Yes" will allow the sharing of information across SmartCare. Selecting "No" will keep the information users see limited to their CDAG.
    b. The Start Date will automatically populate to today's date. We recommend leaving the Expiration Date blank, unless the client explicitly indicates that they would like this consent to last for a short time.



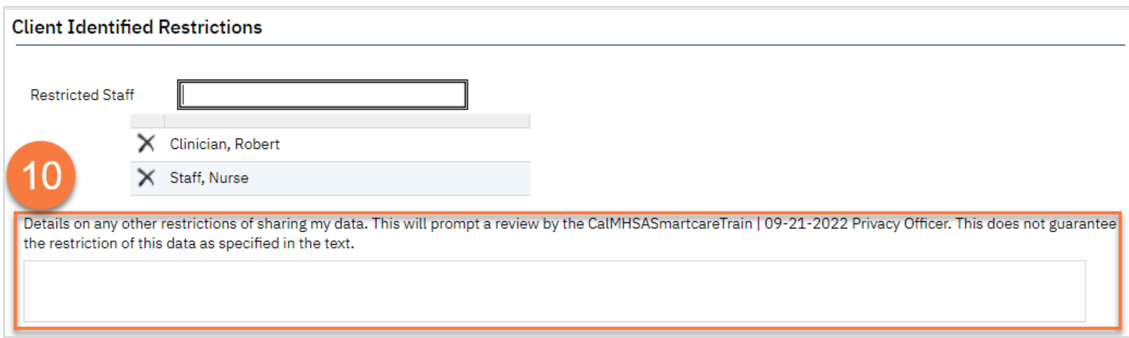
9. If the client wants to keep their chart private from specific individuals, you can add them in Restricted Staff. You can enter more than one staff as needed.
    a. Type the staff's name in the Restricted Staff box. This will search for users. Select the appropriate staff from the search results.



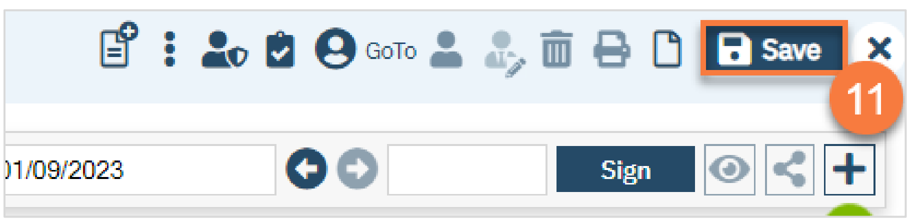
    b. This will add the user to the form. If you selected the incorrect user, you can click on the Delete icon to remove them from the form.



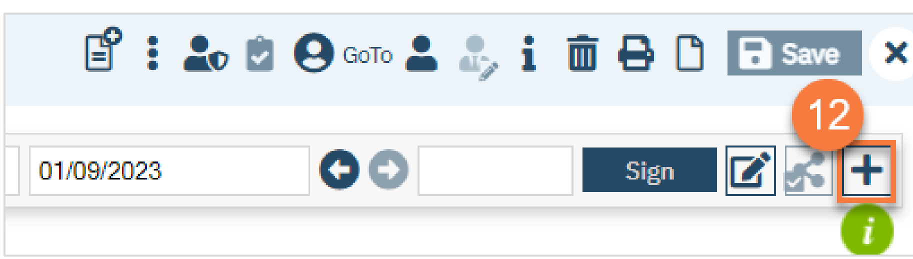
10. There is also a text box if the client wants additional restrictions. This will send a notification to the Privacy Officer, as denoted in SmartCare, to contact the client to discuss the limitations the client is requesting.



11. **Click Sign**.



12. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.



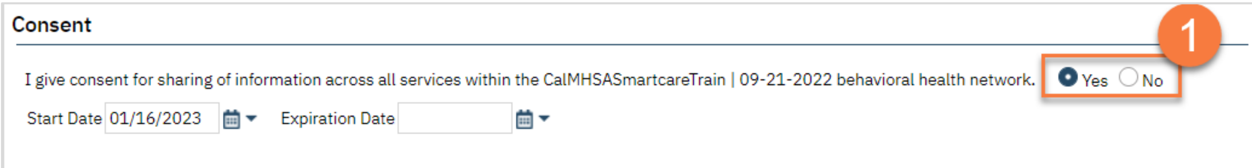
13. This opens the signature details. **Select the client and/or guardian from the Signer field**. You will need to select each cosigner one at a time, so repeat these steps as needed.
14. **Click Co-Sign**.

15. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan in a document to the client's chart?
    a. **Select the method of capturing the signature**.
    b. Once the co-signer is happy with their signature, **click the Sign button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
    c. If the cosigner needs to start over, click the Clear button to erase the current signature.

Once signed by all required people, you are finished.

What do I do if the client wants to revoke their Coordinated Care Consent?

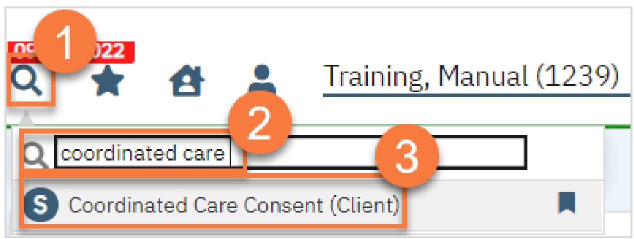
1. To revoke a Coordinated Care Consent, simply create a new Coordinated Care Consent but mark "No" in the Consent section. This will automatically add an end date to the previous Coordinated Care Consent.



Where can I find out if the client has signed a Coordinated Care Consent?

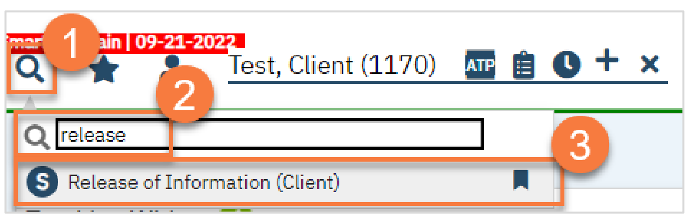
The easiest way to find out if the client has a Coordinated Care Consent is to search for the document using the Search icon. If there is a Coordinated Care Consent already signed in a CDAG that you can view, the PDF will pull up. If not, it will take you to a blank new Coordinated Care Consent.

1. You must first have the client open, click the Search icon.
2. Type Coordinated Care Consent into the search bar.
3. Click to select Coordinated Care Consent (Client).

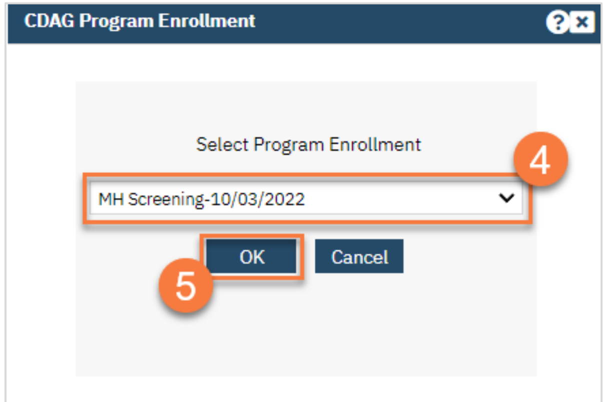


How do I complete a Release of Information (Authorization to Disclose Confidential Information)?

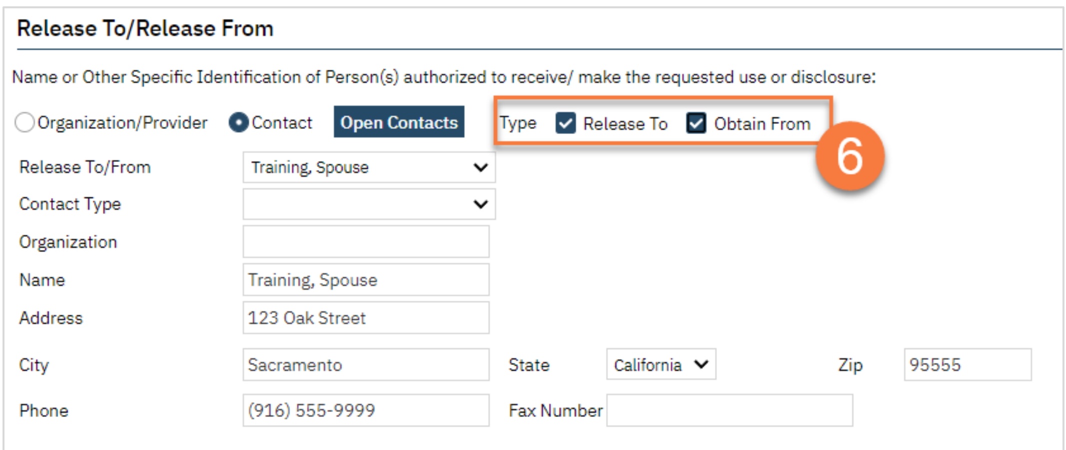
1. You must first have the client open, click the Search icon.
2. Type Release of Information into the search bar.
3. Click to select Release of Information (Client).



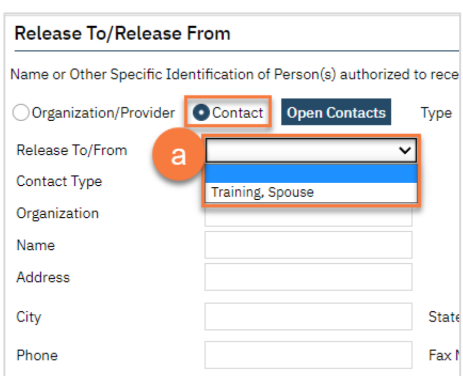
4. In the CDAG Program Enrollment window pop-up, click the drop down and click to select the appropriate program.
5. Click OK to continue.

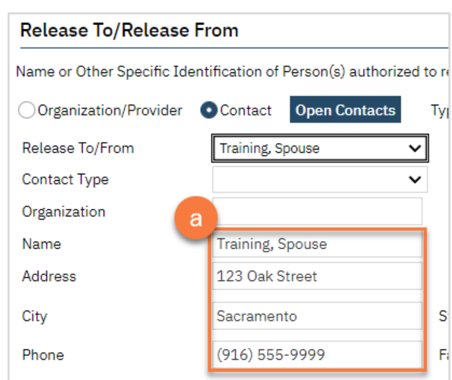


6. **Complete the Release To/Release From section.** Make sure to select whether this authorization is to allow you to release information to this entity and/or obtain information from this entity.

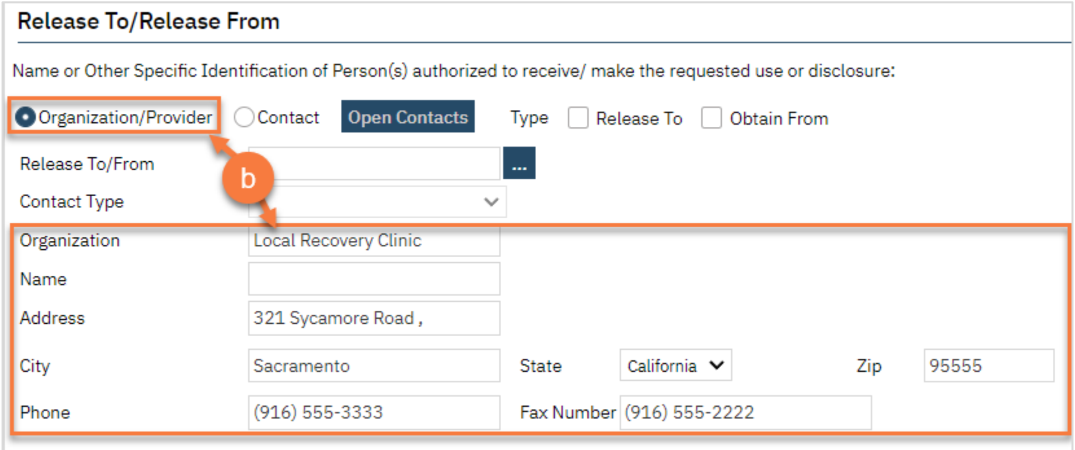


   a. If the person you're completing this release for is already entered as a contact in the Client Information Screen, select "Contact" and then select the person from the drop down list "Release To/From". This will bring in the contact person's information.

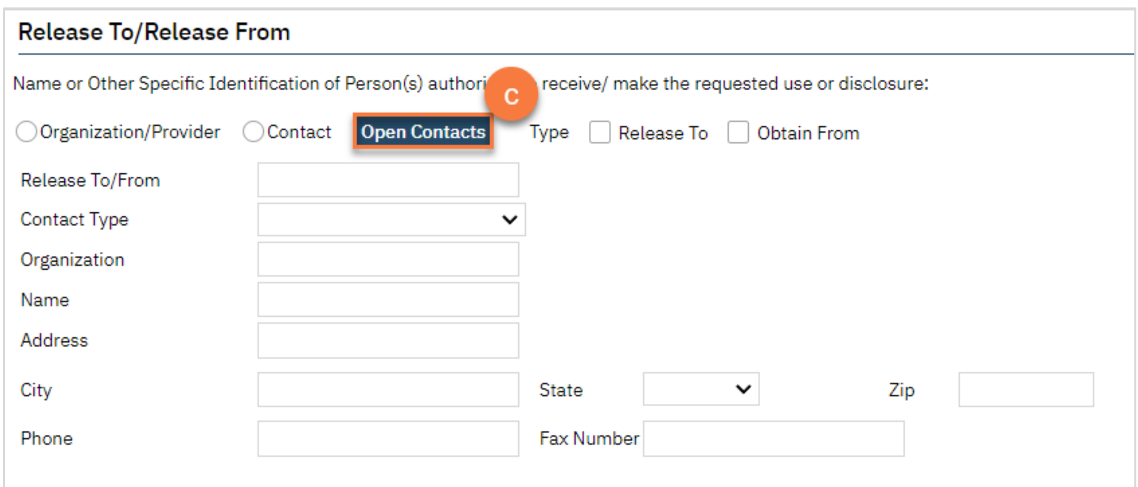




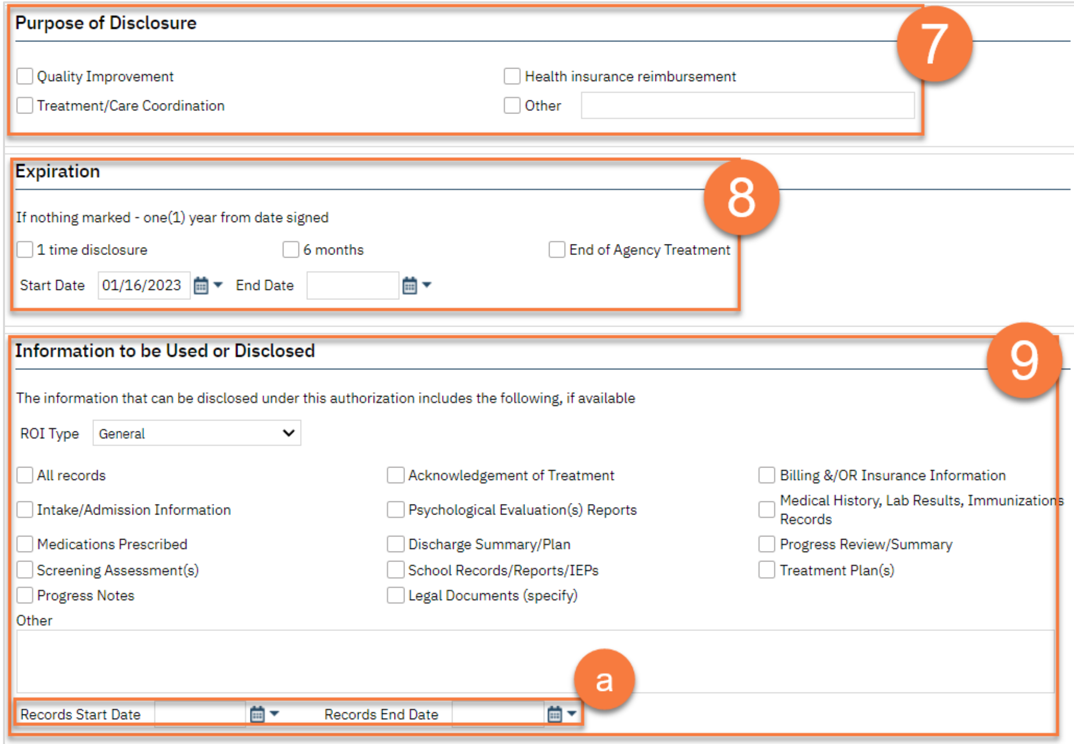
   b. If you're completing a release for an organization, such as Social Services or a school, select "Organization/Provider". This opens a button next to the Release To/From field. Clicking this brings up a pop-up window where you can enter the organization's information. Click save. This will push this information to the ROI and save this information for future ROIs. Enter the organization's information.



c. If you're completing a release for a contact person that is not currently entered as a contact in the Client Information Screen, selecting "Contact" will create an opportunity to select the button "Open Contacts". This will take you to the Client Information Screen, where you can add additional contact.



7. **Complete the Purpose of Disclosure section**. Most authorizations to disclose information are for treatment and/or care coordination, but others may apply. Select the appropriate boxes. If you select "Other", make sure to clarify.
8. **Complete the Expiration section**. The start date automatically fills with today's date. If you don't change anything in this section, the document will automatically expire 1 year from today's date.
9. **Complete the Information to be Used or Disclosed section**. Select all records that are authorized for disclosure per the client's request.
    a. If the client requests that only records from a certain time frame be shared, include the start and end dates.



Purpose of Disclosure

- [ ] Quality Improvement
- [ ] Health insurance reimbursement
- [ ] Treatment/Care Coordination
- [ ] Other

Expiration

If nothing marked - one(1) year from date signed

- [ ] 1 time disclosure
- [ ] 6 months
- [ ] End of Agency Treatment

Start Date 01/16/2023 End Date

Information to be Used or Disclosed

The information that can be disclosed under this authorization includes the following, if available

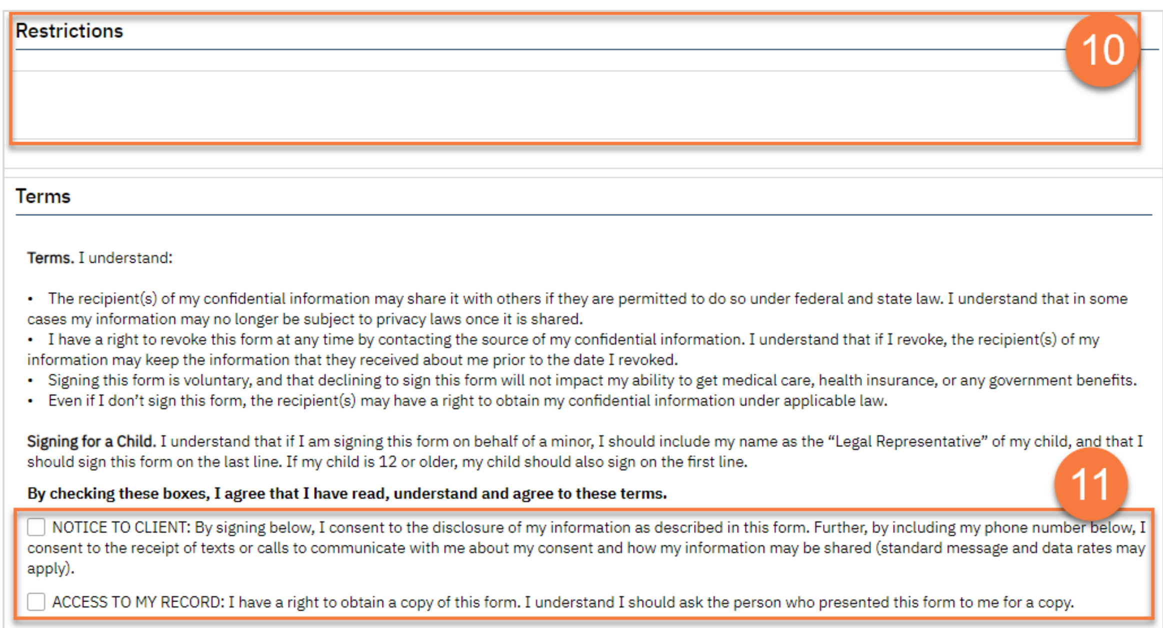
ROI Type General

- [ ] All records
- [ ] Acknowledgement of Treatment
- [ ] Billing &/OR Insurance Information
- [ ] Intake/Admission Information
- [ ] Psychological Evaluation(s) Reports
- [ ] Medical History, Lab Results, Immunizations Records
- [ ] Medications Prescribed
- [ ] Discharge Summary/Plan
- [ ] Progress Review/Summary
- [ ] Screening Assessment(s)
- [ ] School Records/Reports/IEPs
- [ ] Treatment Plan(s)
- [ ] Progress Notes
- [ ] Legal Documents (specify)

Other

Records Start Date Records End Date

10. If the client wishes to put any restrictions on this authorization, enter those in the Restrictions section.
11. The terms section provides the client with information about the authorization they're signing. Make sure to **check both boxes** to demonstrate you've reviewed this information with the client.



Restrictions

Terms

Terms. I understand:

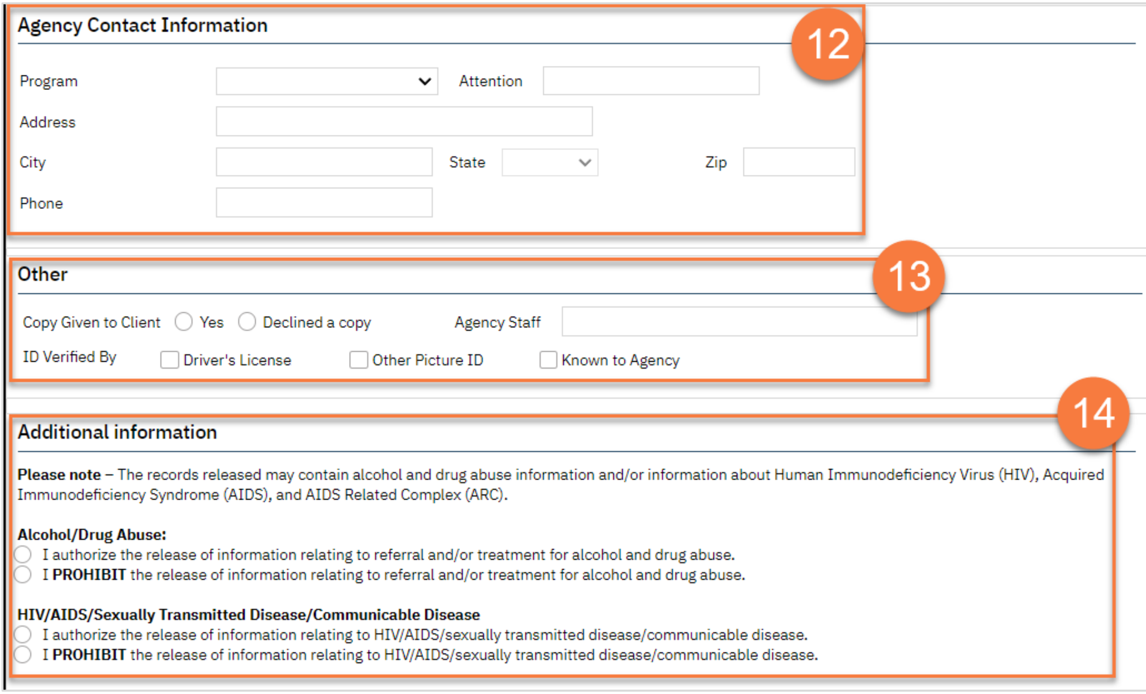
- The recipient(s) of my confidential information may share it with others if they are permitted to do so under federal and state law. I understand that in some cases my information may no longer be subject to privacy laws once it is shared.
- I have a right to revoke this form at any time by contacting the source of my confidential information. I understand that if I revoke, the recipient(s) of my information may keep the information that they received about me prior to the date I revoked.
- Signing this form is voluntary, and that declining to sign this form will not impact my ability to get medical care, health insurance, or any government benefits.
- Even if I don't sign this form, the recipient(s) may have a right to obtain my confidential information under applicable law.

Signing for a Child. I understand that if I am signing this form on behalf of a minor, I should include my name as the "Legal Representative" of my child, and that I should sign this form on the last line. If my child is 12 or older, my child should also sign on the first line.

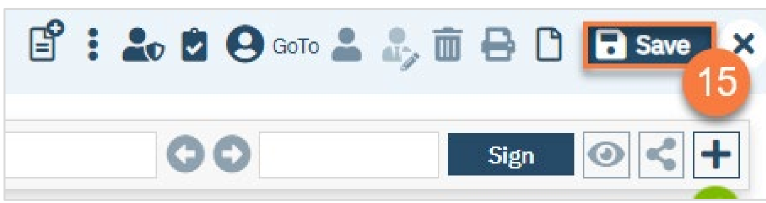
By checking these boxes, I agree that I have read, understand and agree to these terms.

- [ ] NOTICE TO CLIENT: By signing below, I consent to the disclosure of my information as described in this form. Further, by including my phone number below, I consent to the receipt of texts or calls to communicate with me about my consent and how my information may be shared (standard message and data rates may apply).
- [ ] ACCESS TO MY RECORD: I have a right to obtain a copy of this form. I understand I should ask the person who presented this form to me for a copy.

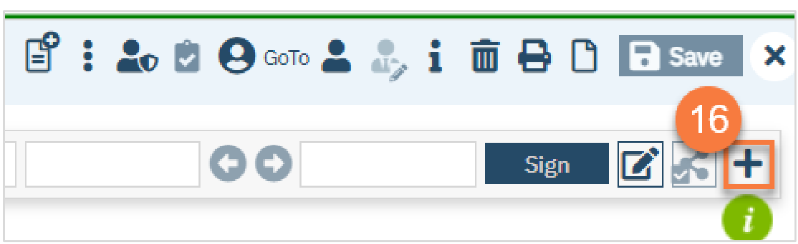
12. **Enter your agency's information in the Agency Contact Information section**.
13. The Other section allows you to document if the client received or declined a copy of the document. It also allows you to document how you verified the client's identity as the appropriate person to sign this document.
14. **The Additional information section must be completed** to document the disclosure of certain types of information. The client must opt to either authorize or prohibit each of these specialty types of information.



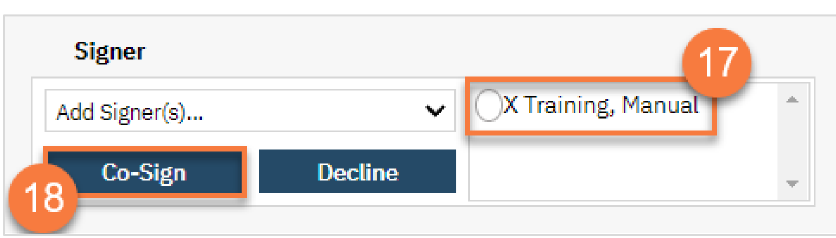
15. **Click Sign** to complete and generate the document.



16. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.



17. This opens the signature details. **Select the client and/or guardian from the Signer field**. You will need to select each cosigner one at a time, so repeat these steps as needed.
18. **Click Co-Sign**.

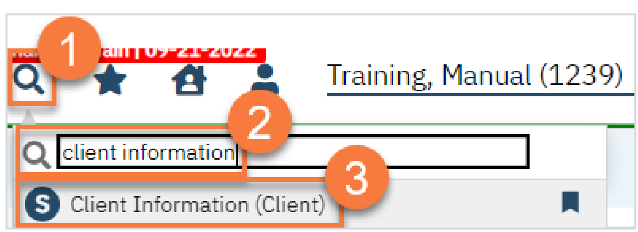


19. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan in a document to the client's chart?
    a. **Select the method of capturing the signature**.
    b. Once the co-signer is happy with their signature, **click the Save button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
    c. If the cosigner needs to start over, click the Clear button to erase the current signature.

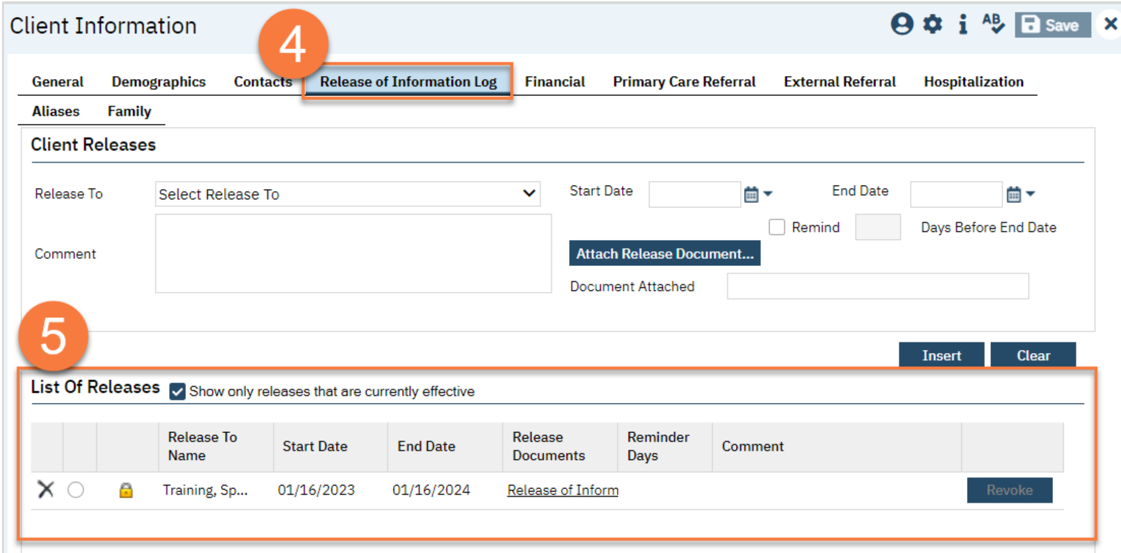
Once signed by all required people, you are finished.

What do I do if the client wants to revoke a Standard Release of Information/Authorization to Disclose Information?

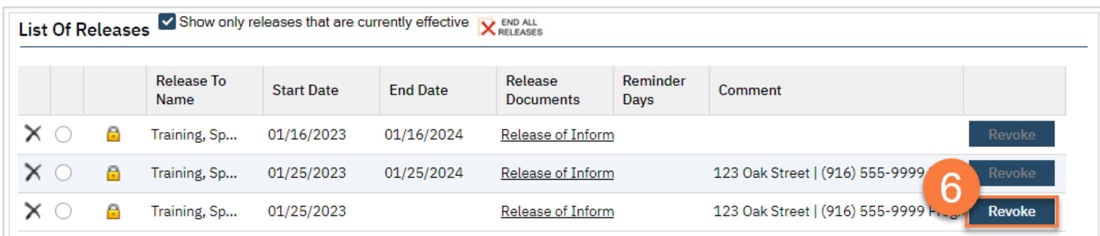
1. With the client open, **click the Search icon**.
2. **Type in "Client Information"** in the search bar.
3. **Select "Client Information (Client)"** from the search results.



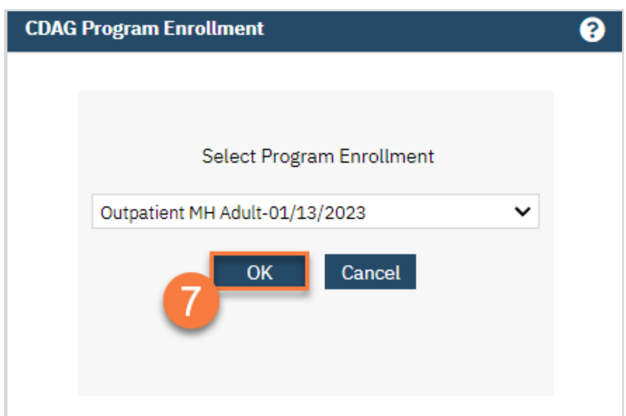
4. **Navigate to the Release of Information Log tab**.
5. You can view the current releases on file in the List of Releases section.



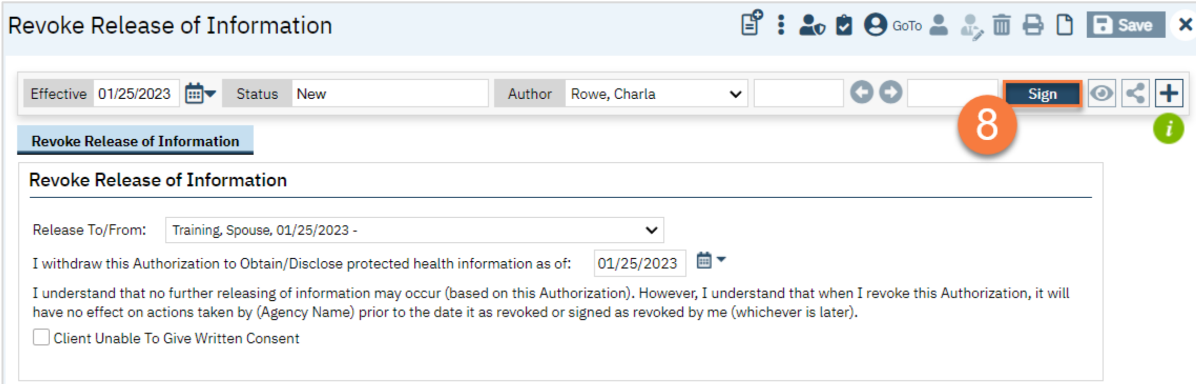
6. To revoke an authorization, **click the Revoke button**.



7. In the CDAG pop-up, **select your program and click OK**.



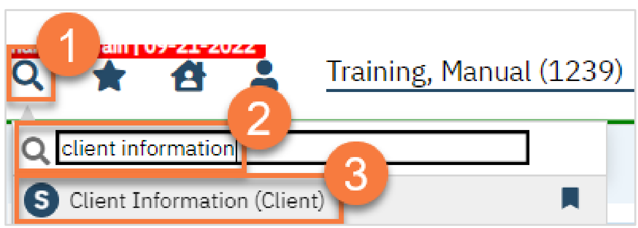
8. Complete the revocation and sign. Have the client co-sign if available.



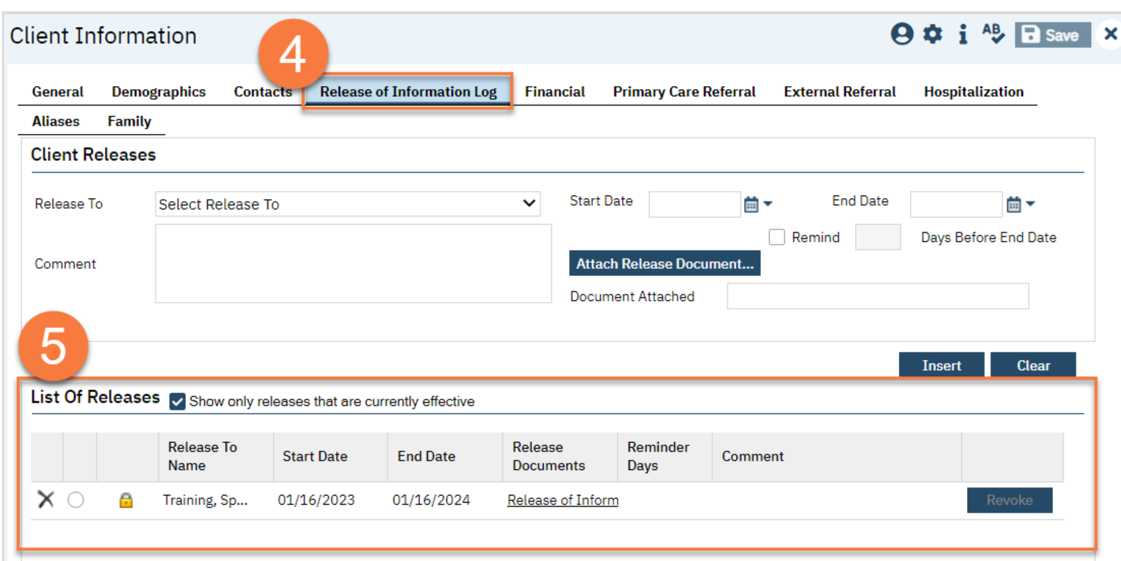
How can I find out what disclosure authorizations the client has signed?

To view the client's list of current disclosure authorizations on file, open the Client information screen and navigate to the Release of Information Log tab.

1. With the client open, click the Search icon.
2. Type in "Client Information" in the search bar.
3. Select "Client Information (Client) from the search results.



4. Navigate to the Release of Information Log tab.
5. You can view the current releases on file in the List of Releases section.



Other Consents

There are multiple types of consents that a client may complete as part of their treatment. SmartCare currently includes the following consent forms:

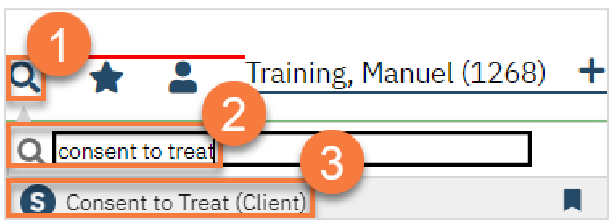
1. Consent to Treat *(sometimes called "Informed Consent")*
2. Consent to Telehealth
3. Consent to Email Communication
4. Consent to Text Communication

The Consent to Treat includes information about limits of confidentiality, working as a registered associate, privacy practices, and about processes such as the grievance and appeal process.

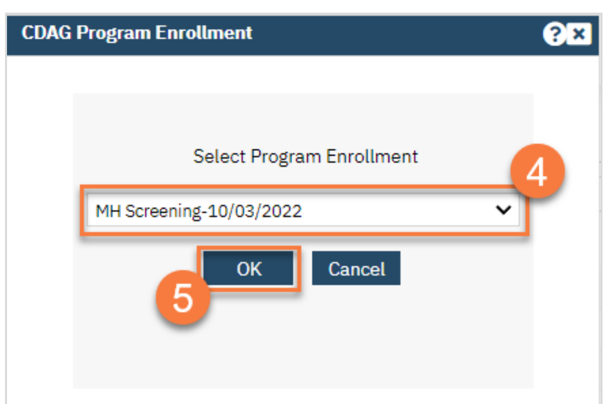
Other consent-like documents, such as Admission Agreements or Advisements are custom for each program. For this reason, these documents are currently done on paper and scanned into the client's chart.

How do I complete a consent form?

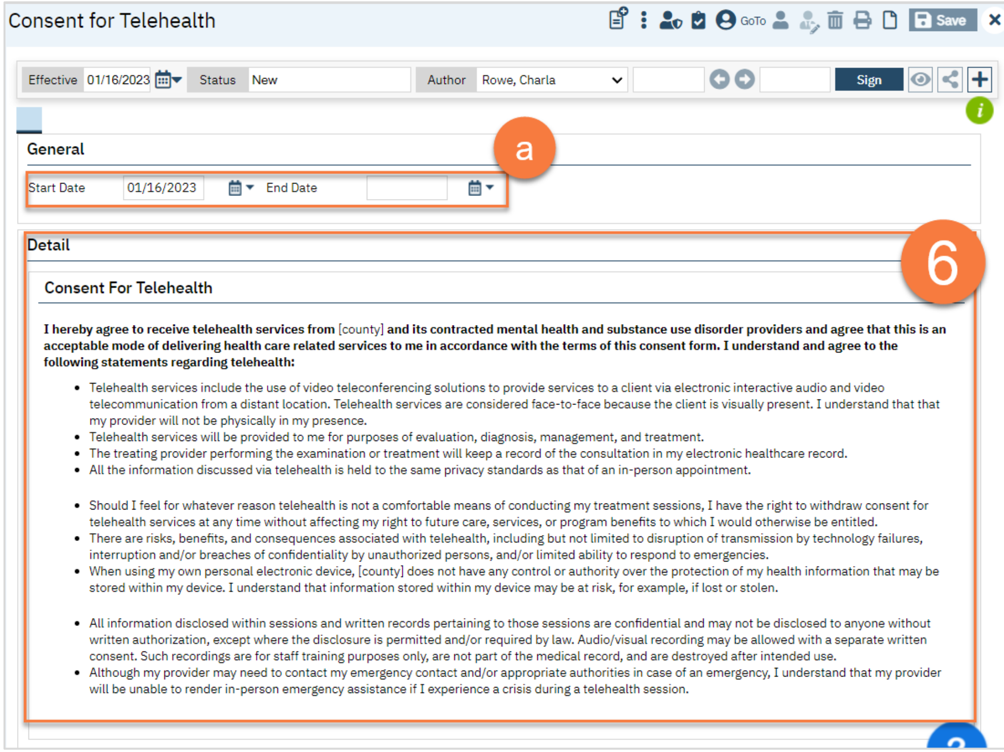
1. You must first have the client open, click the Search icon.
2. **Type the name of the consent** into the search bar.
3. **Click to select the appropriate consent** from the search results.



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

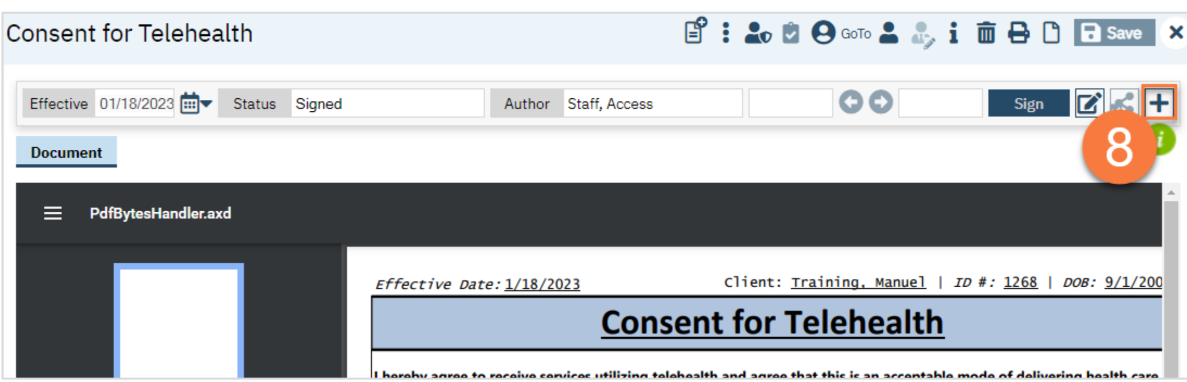


6. The consent document will open. **Review the consent with the client**. The example used below is the Consent for Telehealth.
   a. There will be a start date and end date field, if needed. The start date will automatically populate with today's date. We recommend leaving the end date blank.

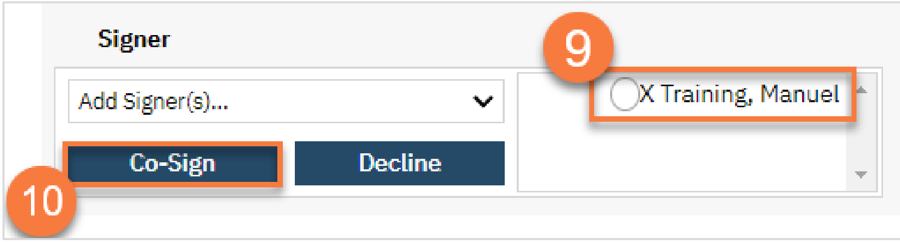


7. Once ready, **click Sign**.

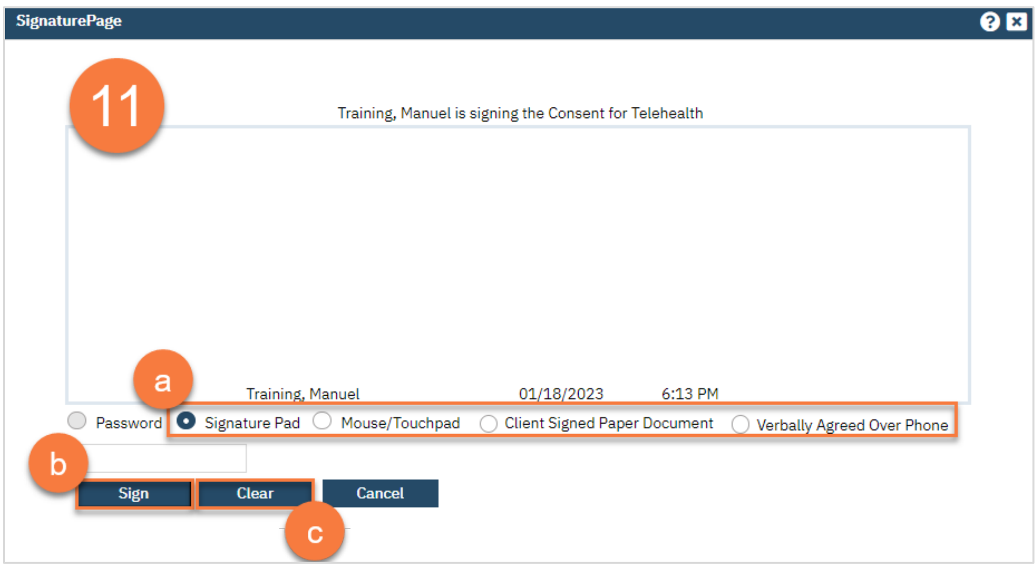
8. This will create the PDF version of the form. **Click the Plus icon** in the upper right corner of the PDF viewer.



9. This opens the signature details. **Select the client and/or guardian from the Signer field**. You will need to select each cosigner one at a time, so repeat these steps as needed.
10. **Click Co-Sign**.



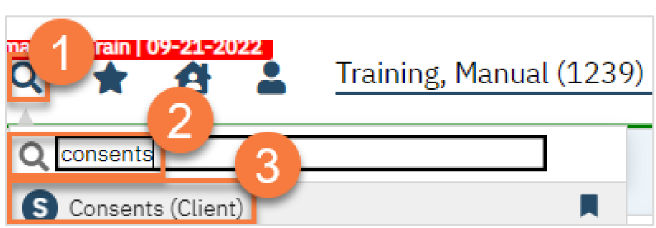
11. This brings up the Signature Page pop-up window. The co-signer can now sign using a signature pad, a mouse, or a touchpad to capture their signature. You can also designate that the client has signed on a paper version of the document or that they client verbally agreed and was unable to sign. If the client has signed a paper version of the form, that form should be scanned in. See How do I scan in a document to the client's chart?
    a. **Select the method of capturing the signature**.
    b. Once the co-signer is happy with their signature, **click the Sign button**. If the client has signed a paper version of the form or has agreed verbally and is unable to sign electronically at this point, these are other options.
    c. If the cosigner needs to start over, click the Clear button to erase the current signature.



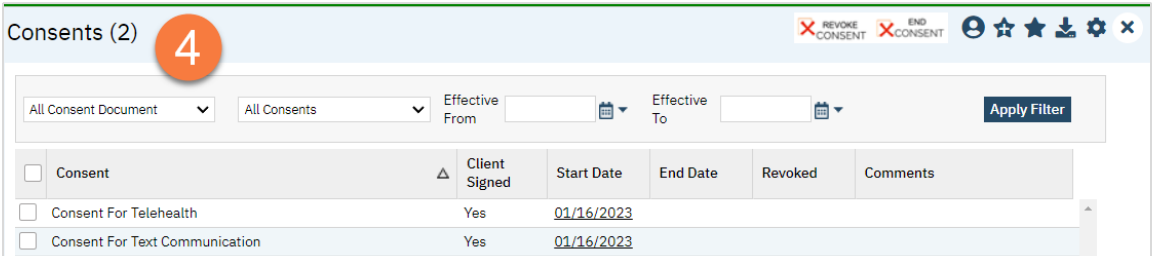
Once signed by all required people, you are finished.

Where can I see what consents a client has signed?

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

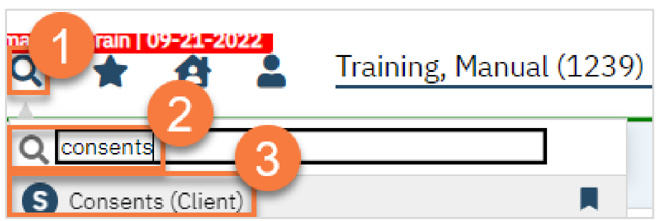


4. This brings you to the Consents list page, where you can see what consents the client has on file. To view the document itself, simply click on the document's name to view the PDF version of it. Note: you'll only be able to view consents that are in your CDAG.

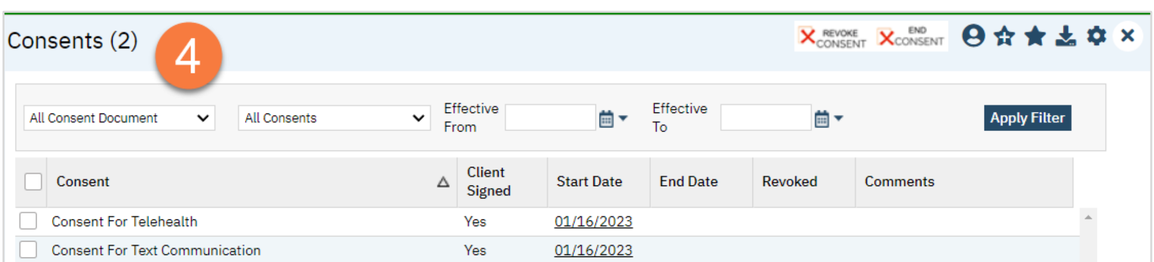


A client wants to revoke a consent. What do I do?

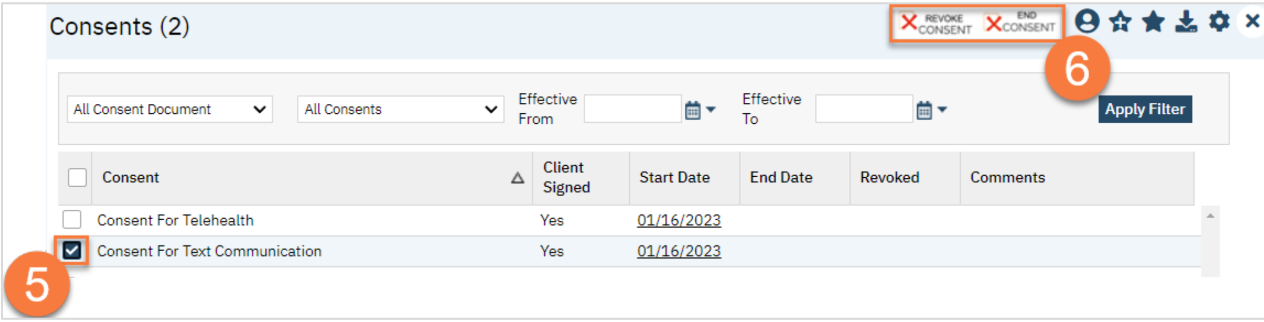
1. You must first have the client open, **click the Search icon**.
2. **Type "Consents"** into the search bar.
3. **Click to select "Consents (Client)"** from the search results.



4. This brings you to the Consents list page, where you can see what consents the client has on file. To view the document itself, simply click on the document's name to view the PDF version of it. Note: you'll only be able to view consents that are in your CDAG.



5. Select the consent you want to revoke.
6. Click the "Revoke Consent" or "End Consent" button.
   a. Revoking a Consent removes the consent.
   b. Ending the consent adds an end date to the consent.


Consents (2)
REVOKE CONSENT
END CONSENT
6
All Consent Document
All Consents
Effective From
Effective To
Apply Filter
Consent
Client Signed
Start Date
End Date
Revoked
Comments
Consent For Telehealth
Yes
01/16/2023
Consent For Text Communication
Yes
01/16/2023
5

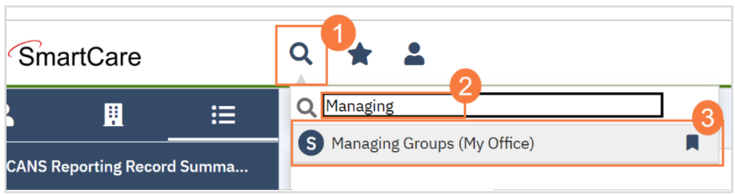
Front Office Group Management

Although services are covered above, there are unique attributes to services provided in a group format. We'll cover all group-related documentation in this section.

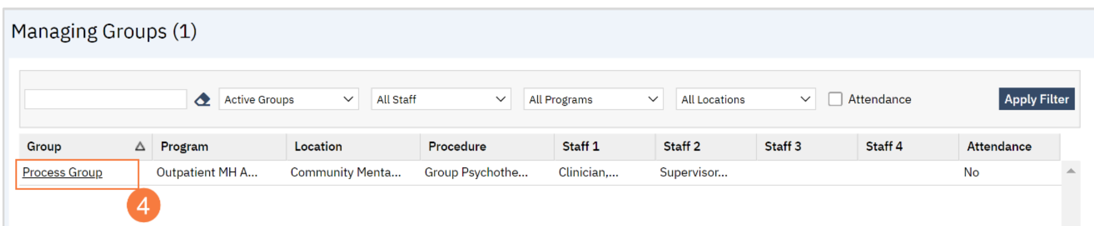
How to Add a New Client to a Group

To add a new client to a Group, follow the steps below:

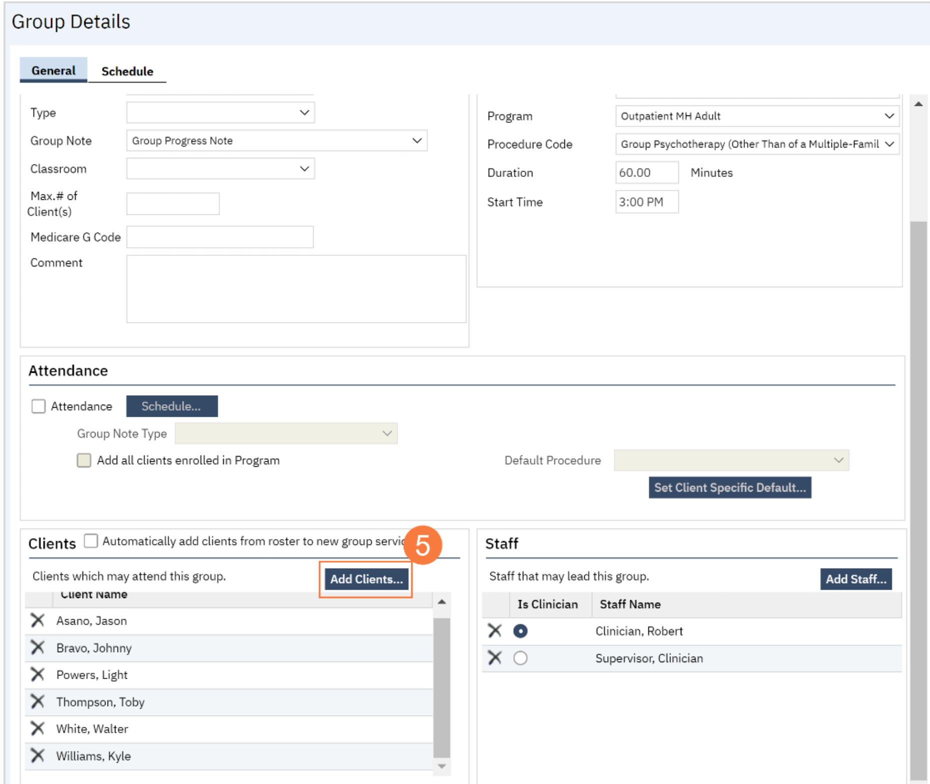
1. **Click the Search icon**.
2. **Type Managing** into the search bar.
3. **Click to select Managing Groups (My Office).**



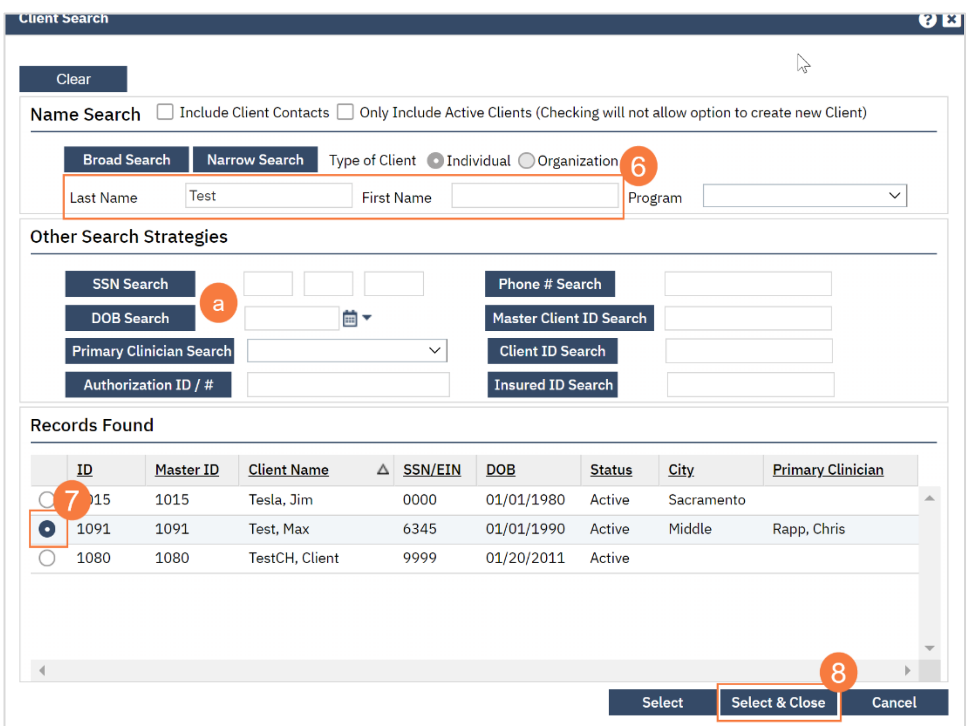
4. **Click to select the Process Group** you will be adding the client to.



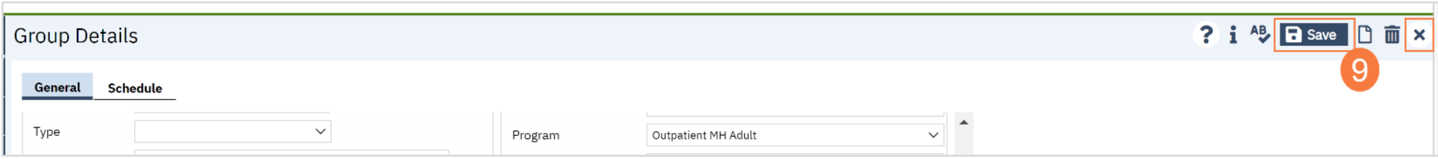
5. Locate the Client section towards the bottom of the Group Details screen. **Click Add Clients**.



6. The Client Search window will open, **click in the Last Name and First Name fields** to enter the corresponding information. **Select Enter** on your Keyboard to populate search results.
   a. You can also use the Other Search Strategies fields to search by SSN, DOB, etc.
7. **Click the radio button** to left of the client you want to select.
8. **Click Select and Close.** This client will be added to the group.



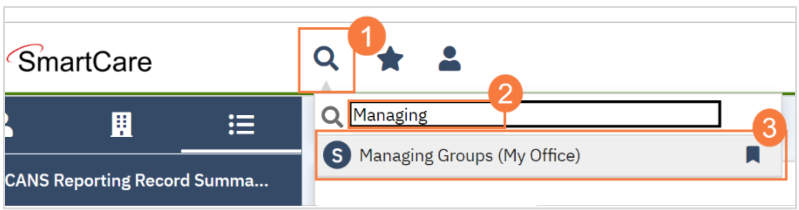
9. **Click Save. Click the X** to close the screen.



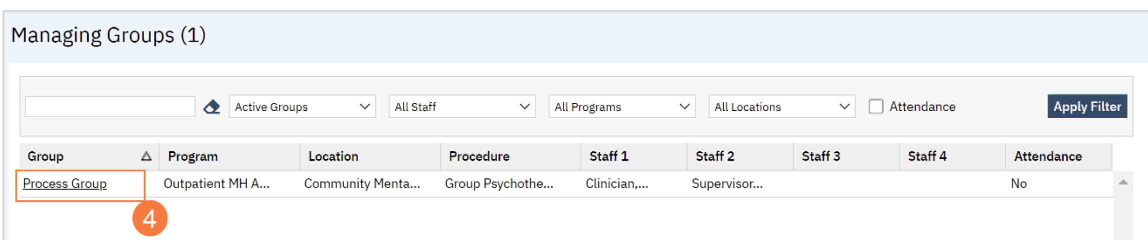
How to Add or Change a Staff Member in a Group

To add or change a staff member in a group, follow the steps below:

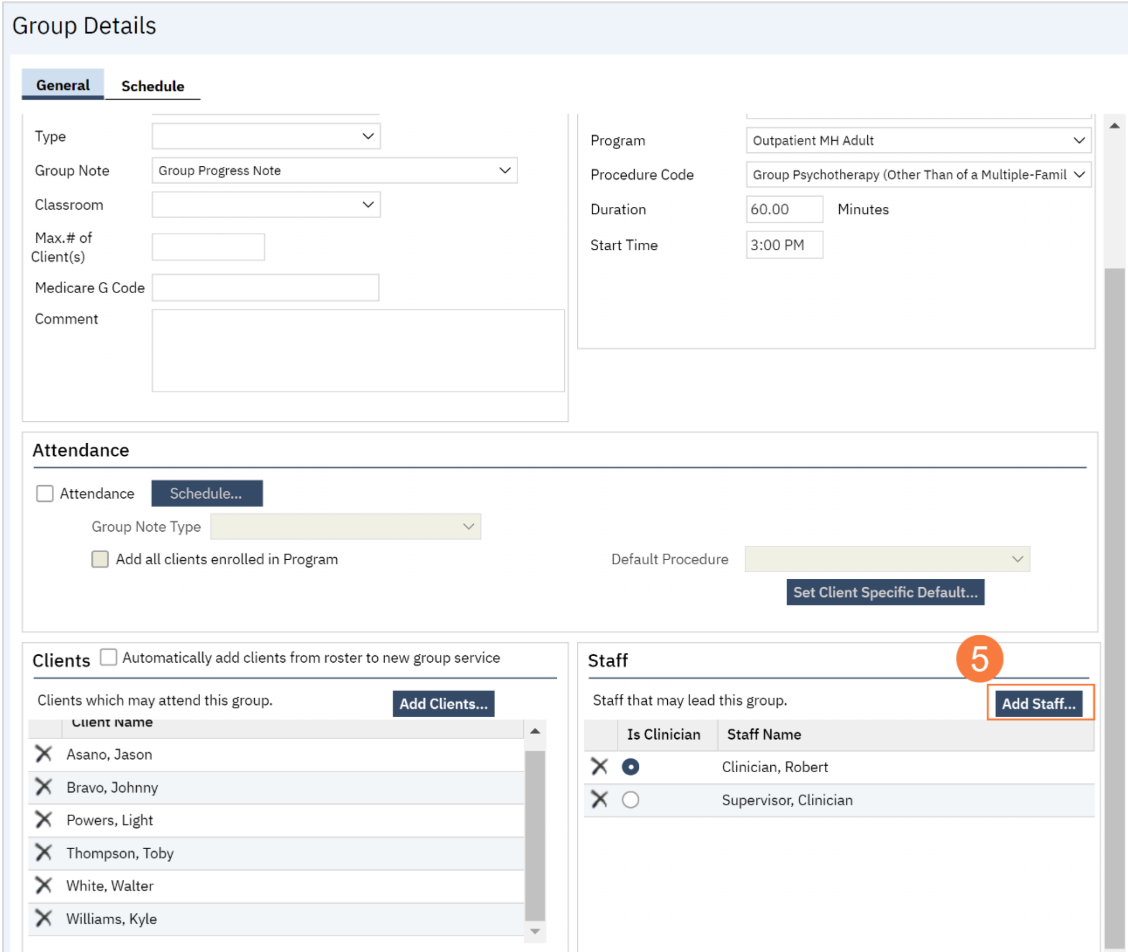
1. **Click the Search icon**.
2. **Type Managing** into the search bar.
3. **Click to select Managing Groups (My Office).**



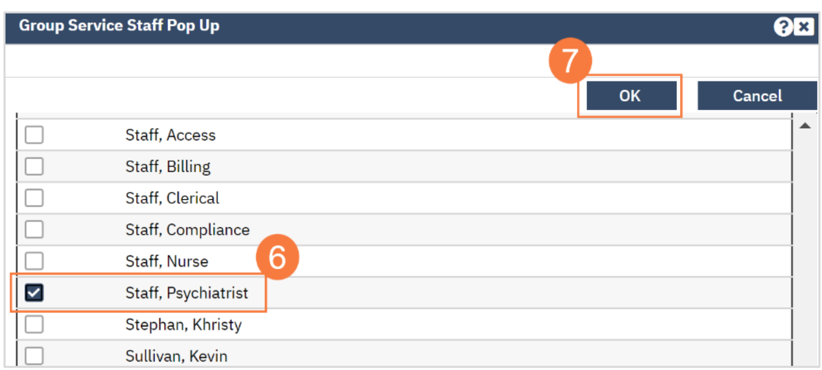
4. **Click to select the Process Group** you will be adding the client to.



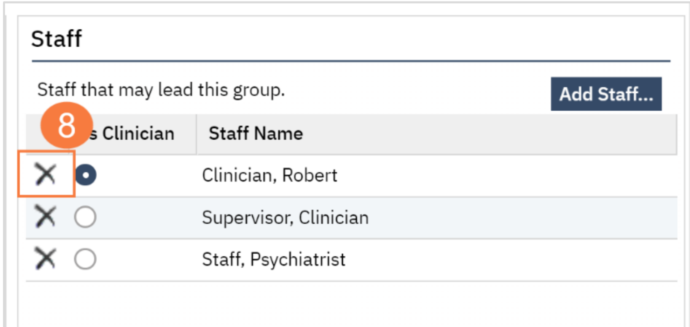
5. Locate the Staff section towards the bottom of the Group Details screen. **Click Add Staff.**



6. **Click to select** the correct staff member to add.
7. **Click OK**.



8. And/or, if you need to remove a staff member, **click the X** to the left of the staff member you want to remove.



9. **Click Save. Click the X** to close the screen.

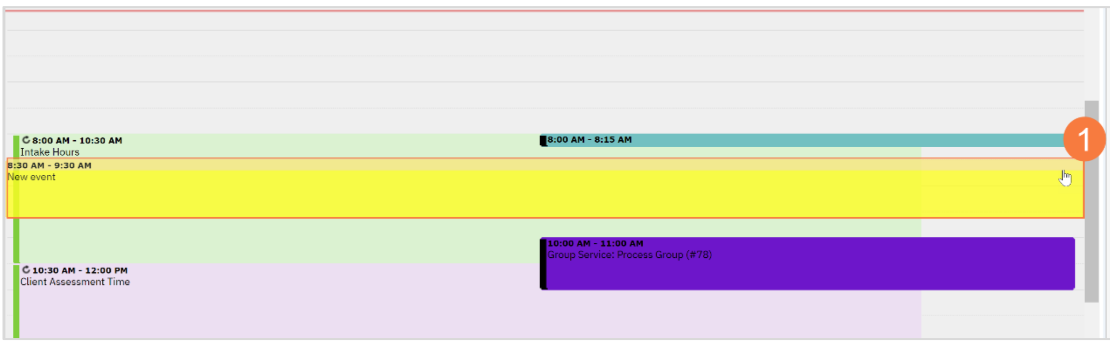
My Calendar Management

In this section you will learn how to create a client appointment, reschedule an appointment, and create non-client facing time on your schedule for paperwork, training, etc.

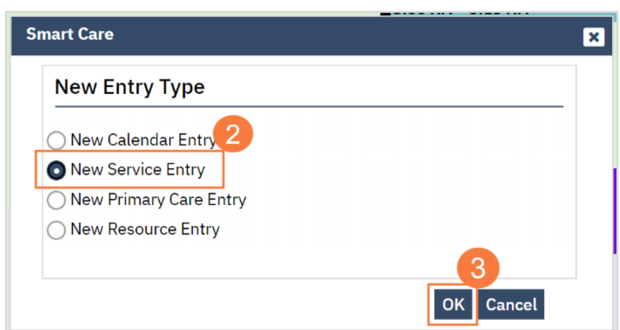
How to Create an Appointment from Your Calendar

To create an appointment from your schedule, follow the steps below,

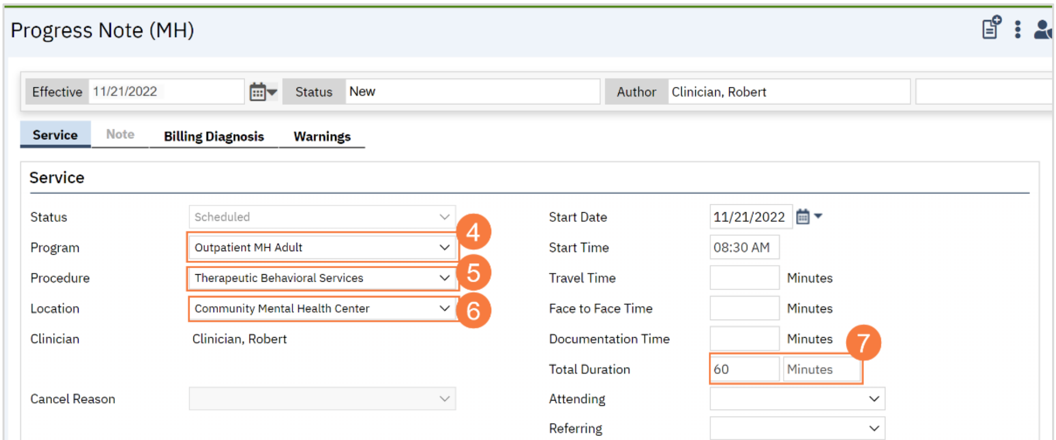
1. From the Staff Calendar screen, **click and drag your mouse on the calendar timeslot** you want to book.



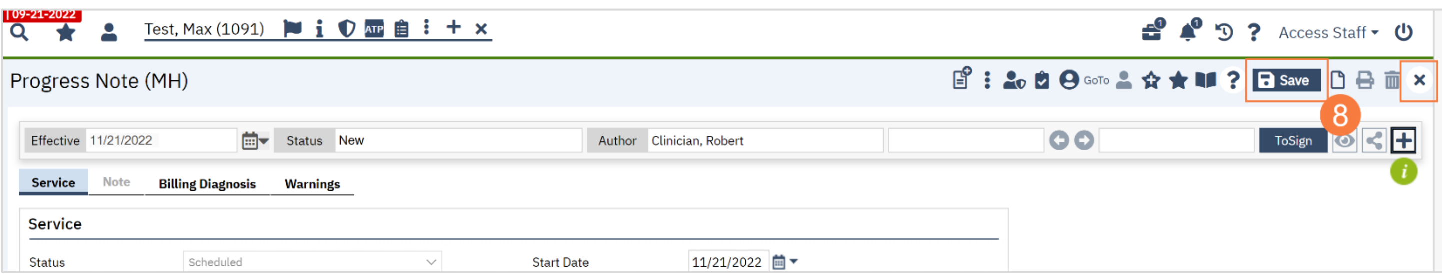
2. In the New Entry Type pop-up, **select the New Service Entry radio button.**
3. **Click OK**.



4. In the Service Notes screen, **click the drop-down menu** in the program field and **select the appropriate program**
5. **Click the drop-down menu in the Procedure field** and **select the appropriate procedure**.
6. **Click the drop-down menu in the Location field** and **select the appropriate location**.
7. **Click in the Total Duration field** and **enter the duration of the appointment.**
8.



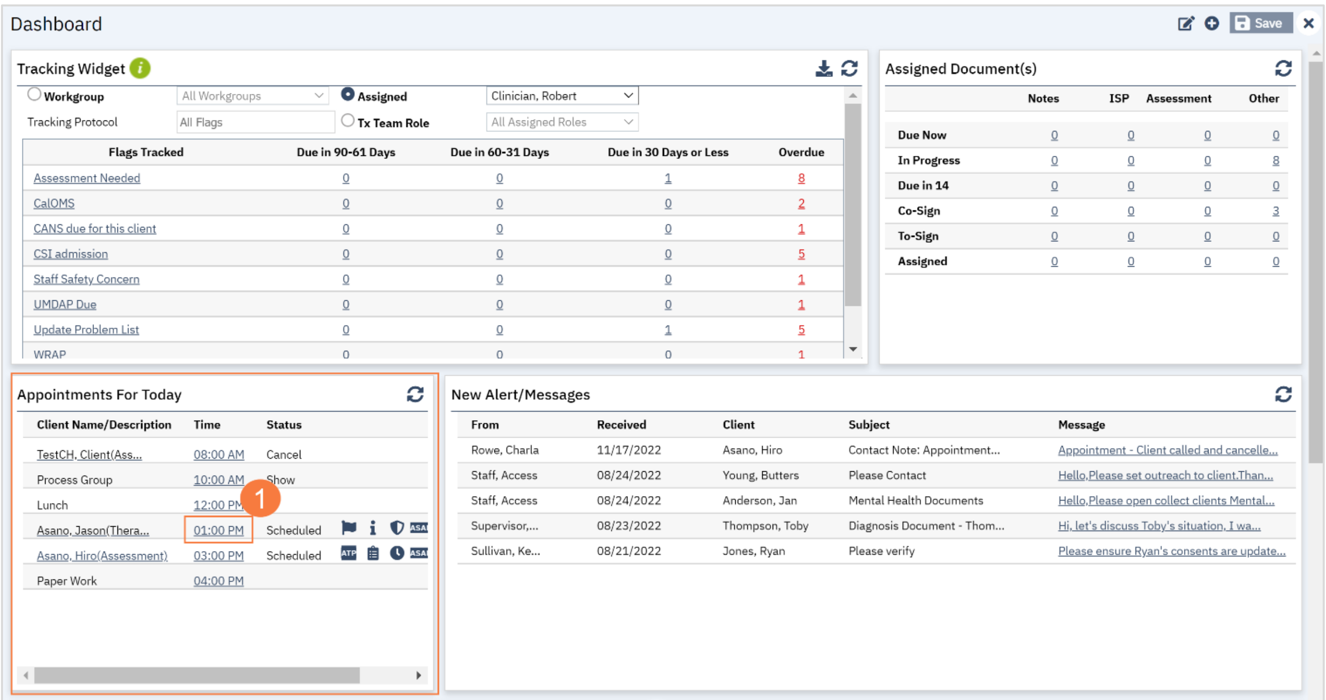
9. **Click the Save icon**. **Click the X icon** to close the screen.



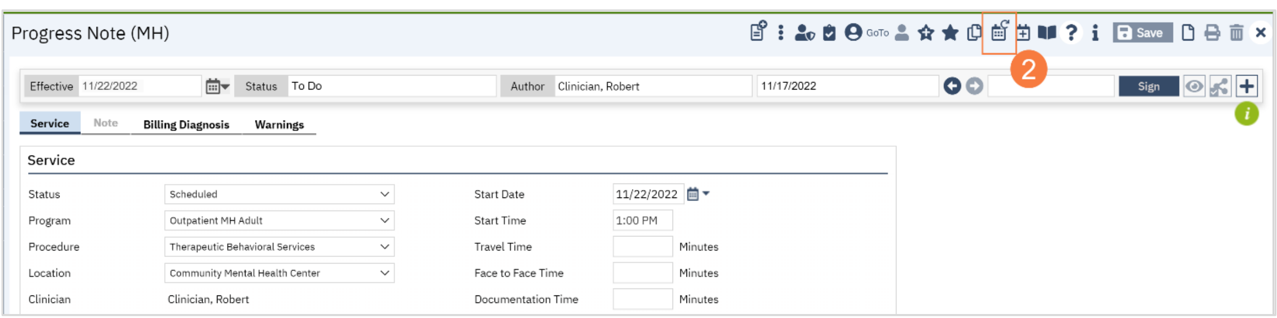
How to Reschedule a Client's Appointment

To reschedule a client's appointment from your calendar, follow the steps below:

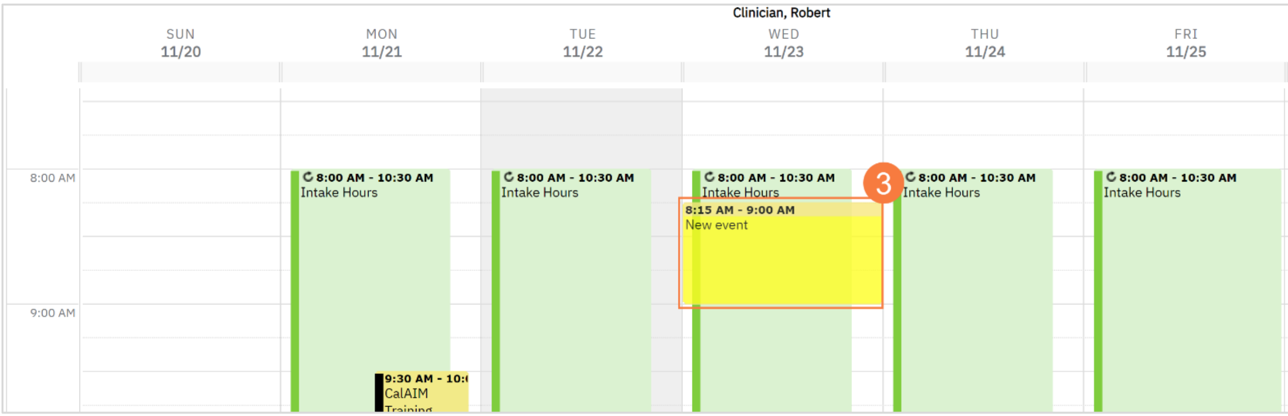
1. From your SmartCare home page, locate the Appointments for Today widget. **Click the appointment time** to the right of the patient you need to reschedule.



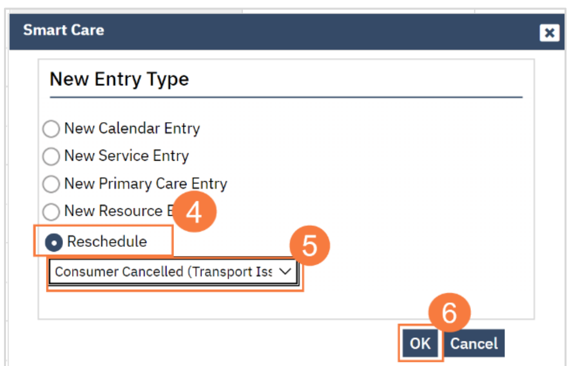
2. In the Progress Note screen, **click the Reschedule icon**.



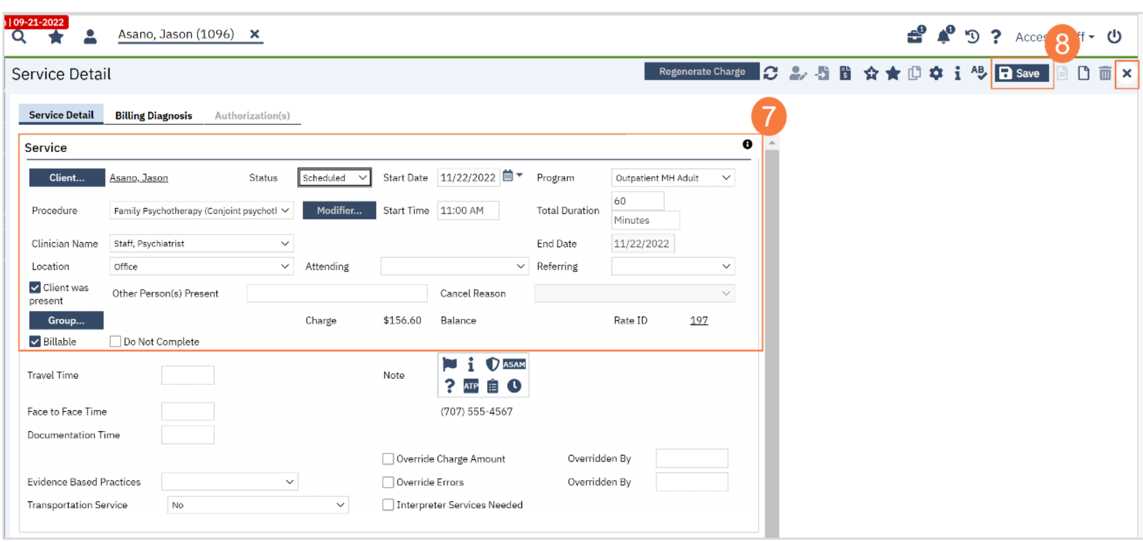
3. Your Staff Calendar screen will open, **click and drag your mouse on the calendar timeslot** you want to book.



4. In the New Entry Type window, **click the radio button for Reschedule**.
5. **Click to select the reason** for the reschedule.
6. Click OK.



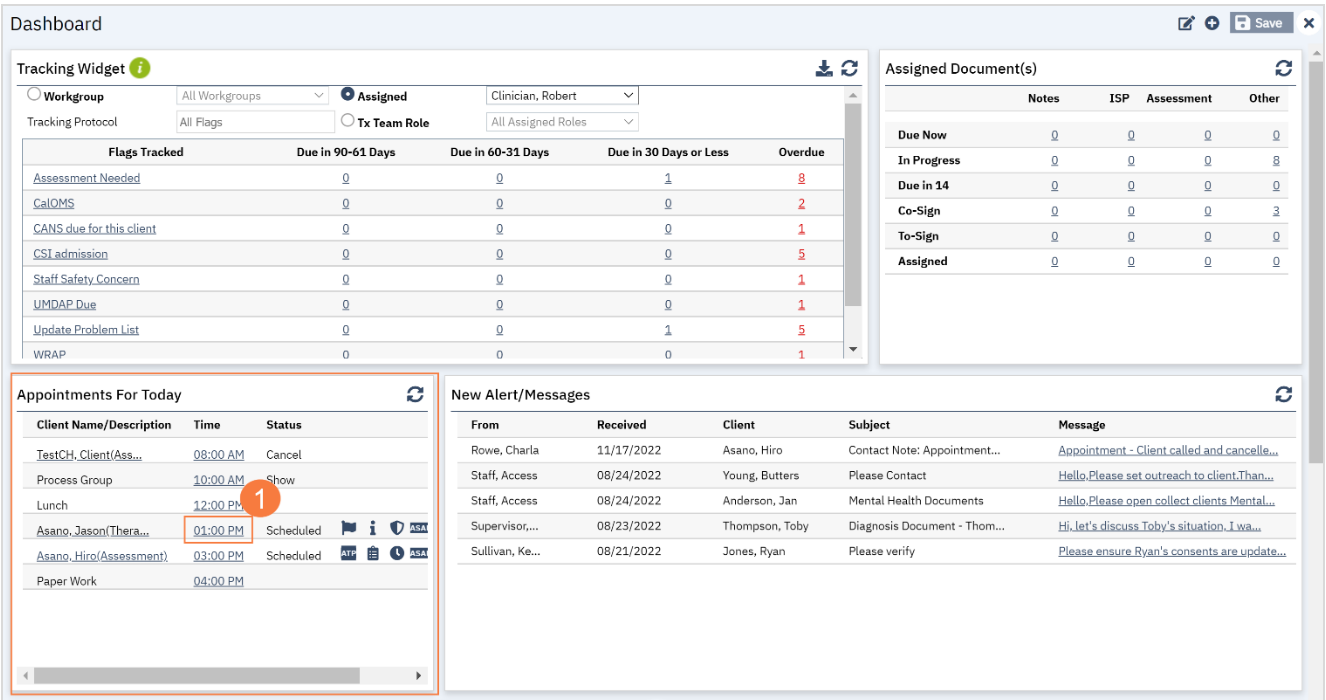
7. The Service Entry window will open, ensure all the information in correct
8. **Click Save** to reschedule the appointment. **Click the X** to close.



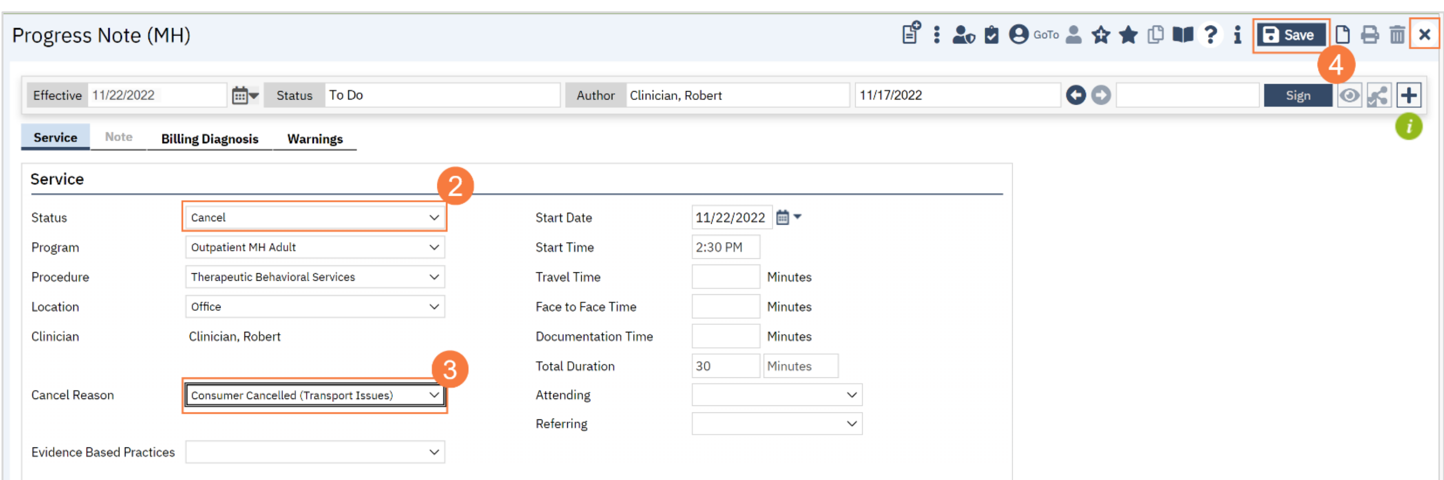
How to Cancel a Client's Appointment

To cancel a client's appointment from your calendar, follow the steps below:

1. From your SmartCare home page, locate the Appointments for Today widget. **Click the appointment time** to the right of the patient you need to cancel.



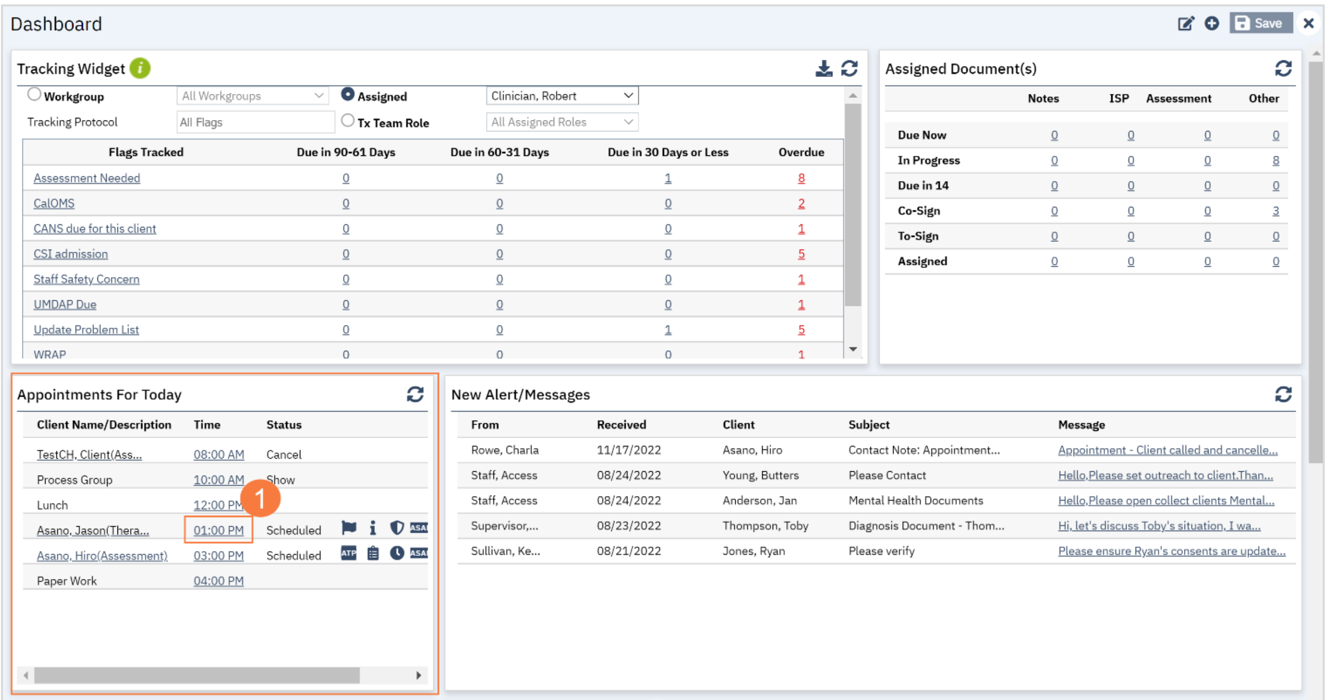
2. The Progress Note screen will open, **click the drop-down menu in the Status field** and **select Cancel.**
3. **Click the drop-down menu in the Cancel Reason field** and **select the appropriate reason.**
4. **Click Save** to cancel the appointment. **Click the X** to close.



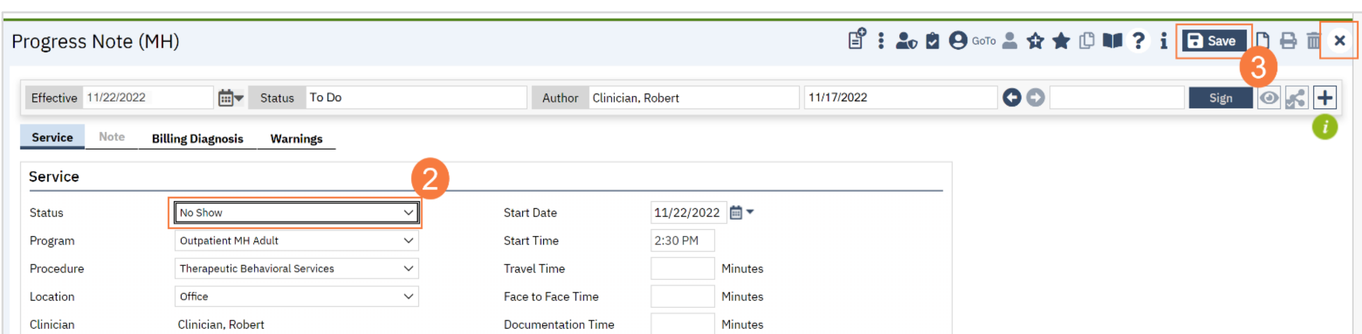
How to Document a No-Show Appointment

To document a No-Show Appointment, follow the steps below:

1. From your SmartCare home page, locate the Appointments for Today widget. **Click the appointment time** to the right of the patient you need to cancel.



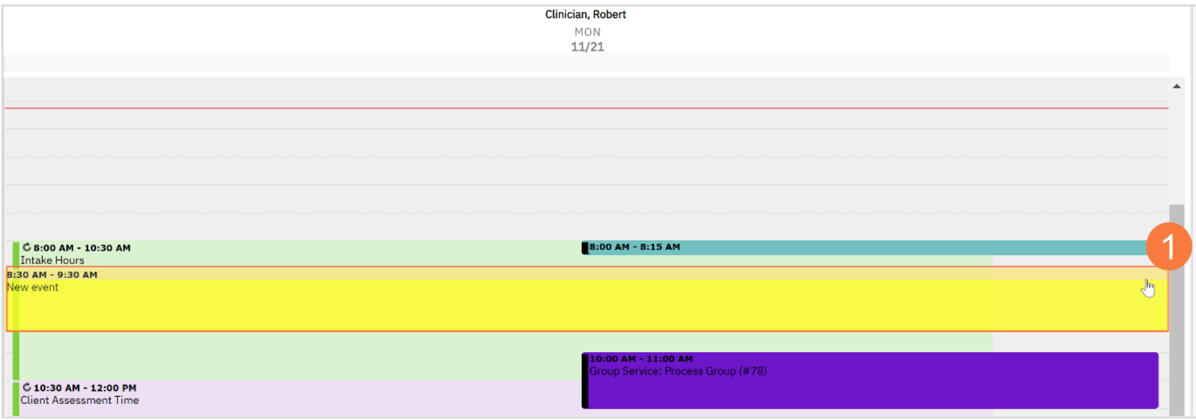
2. The Progress Note screen will open, **click the drop-down menu in the Status field** and **select No Show.**
3. **Click Save** to cancel the appointment. **Click the X** to close.



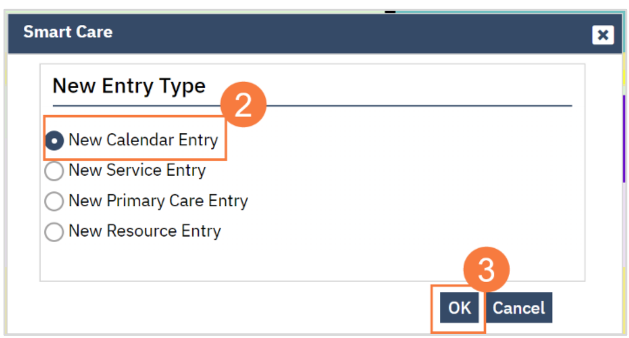
How to Schedule Non-Client Time on Your Calendar

To schedule non-client time on your calendar such as paperwork time, meetings, supervision, training, holiday, etc., follow the steps below:

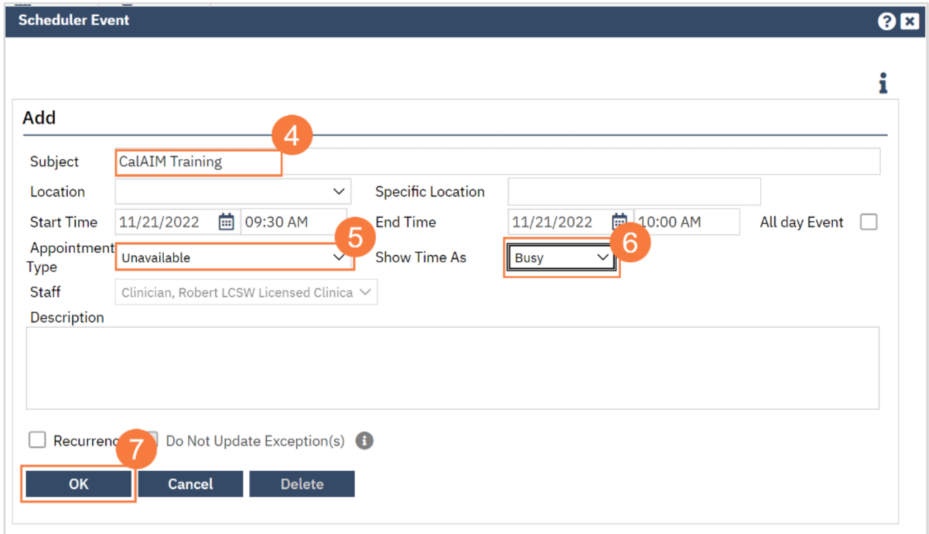
1. From the Staff Calendar screen, **click and drag your mouse on the calendar timeslot** you want to book.



2. In the New Entry Type pop-up, **select the New Calendar Entry radio button.**
3. **Click OK**.



4. The Scheduler Event window will open, **click in the Subject field** and **enter the subject** for the calendar entry.
5. **Click the drop-down menu in the Appointment Type field** and **select the correct option**.
6. **Click the drop-down menu in the Show Time As field** and **select the correct option**.
7. **Click OK**.



Scheduler Event
Add
4
Subject
CalAIM Training
Location
Specific Location
Start Time
11/21/2022
09:30 AM
5
End Time
11/21/2022
6
10:00 AM
All day Event
Appointment Type
Unavailable
Show Time As
Busy
Staff
Clinician, Robert LCSW Licensed Clinica
Description
Recurrenc
7
Do Not Update Exception(s)
OK
Cancel
Delete

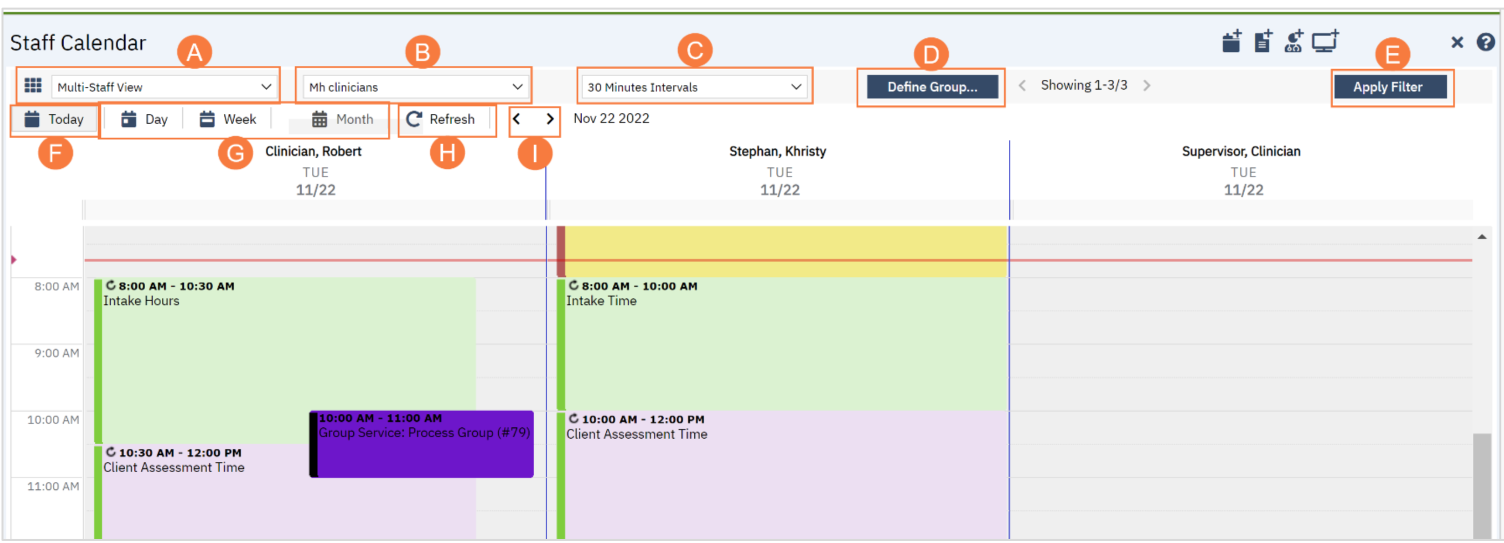
Front Desk Workflows

Here will be introduction to front desk….

Basic Navigation of the Staff Calendar

Use the guide below to learn how to navigate the Staff Calendar screen,

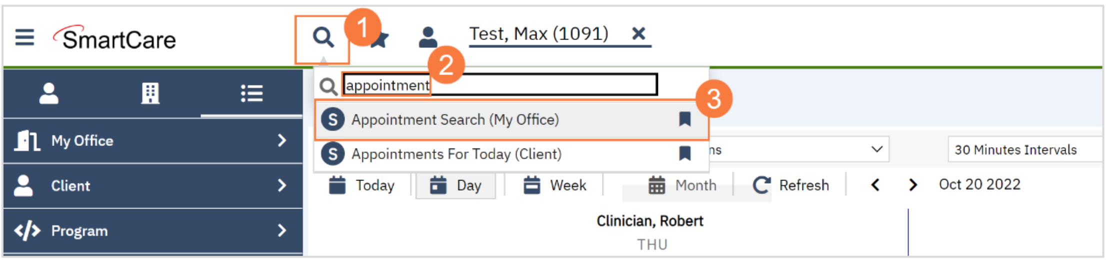
A. The View drop-down menu will allow to switch between calendar views of a single-staff, multiple-staff members based on a pre-defined group, or multiple-staff members that you can select.
B. In the multiple-staff view, this will allow you to choose between pre-defined groups. In single-staff view, this will allow you to switch between staff members.
C. The Intervals drop-down menu will allow you to tell SmartCare the time intervals you want the calendar to display. in. For example, if you select 30 minutes there will be two time slots in each hour on the calendar.
D. The Define Group button will allow you to create your own customized staff group.
E. The Apply Filter button will need to be clicked any time you make changes to A-C (listed above) in order for it to update the calendar below.
F. The Today button will bring you back to today's date when you have navigated away to a different date.
G. The Day, Week, and Month buttons will allow you to change between daily view, weekly view, or monthly view.
H. The Refresh button will refresh the calendar and show you the most up-to-date information.
I. The Forward and Back buttons will take you forward a day and back a day.



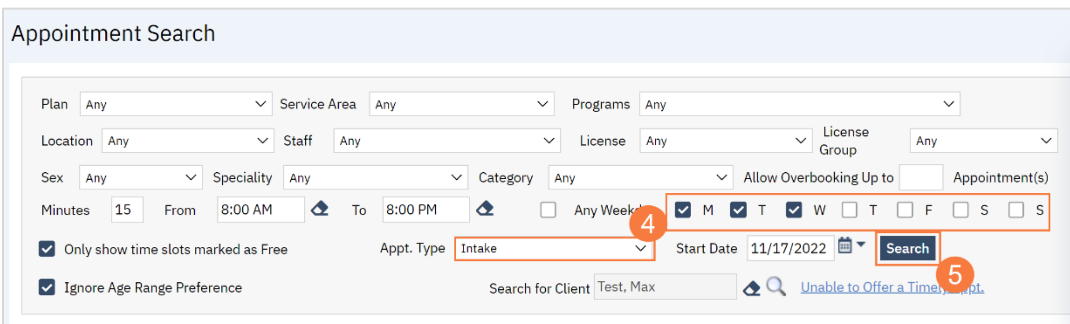
How to Schedule an Appointment

To schedule an appointment, follow the steps below:

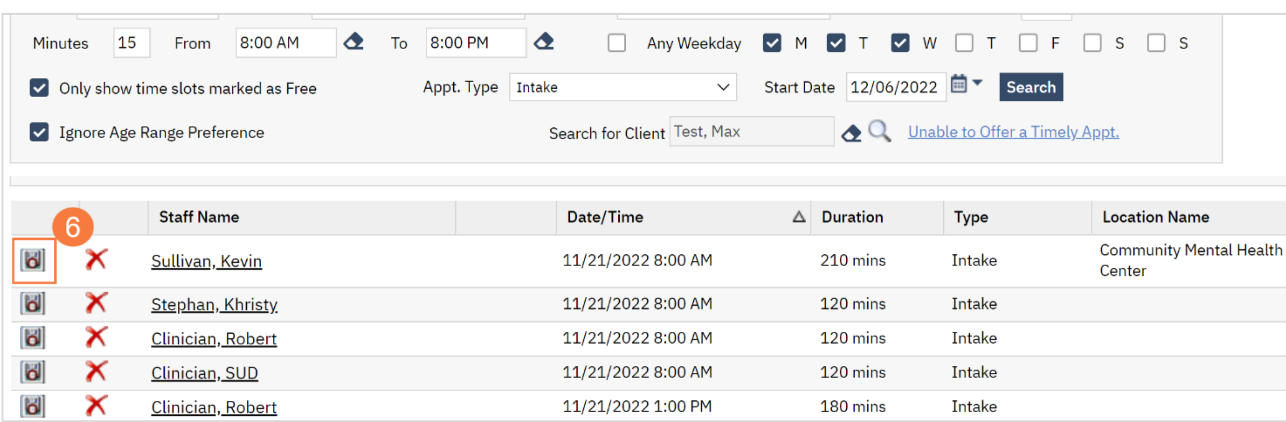
1. With the client open, **click the Search icon.**
2. **Type Appointment** in the search bar.
3. **Click to select** Appointment Search (My Office).



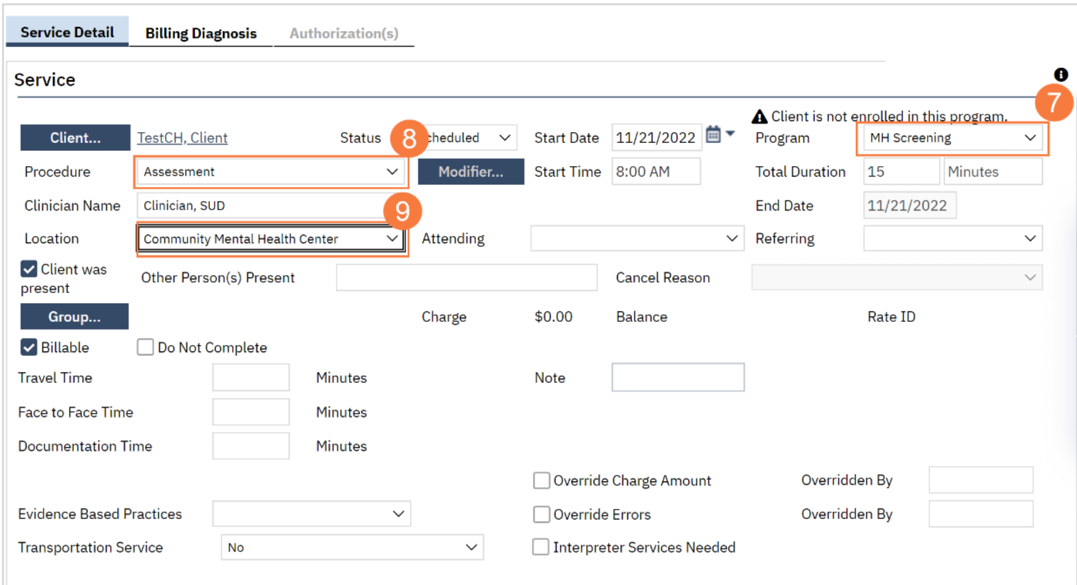
4. In the Appointment Search screen, select the parameters for your search, such as:
   - Appointment type
   - Days of the week
   - Clinician, etc.
5. **Click Search.**



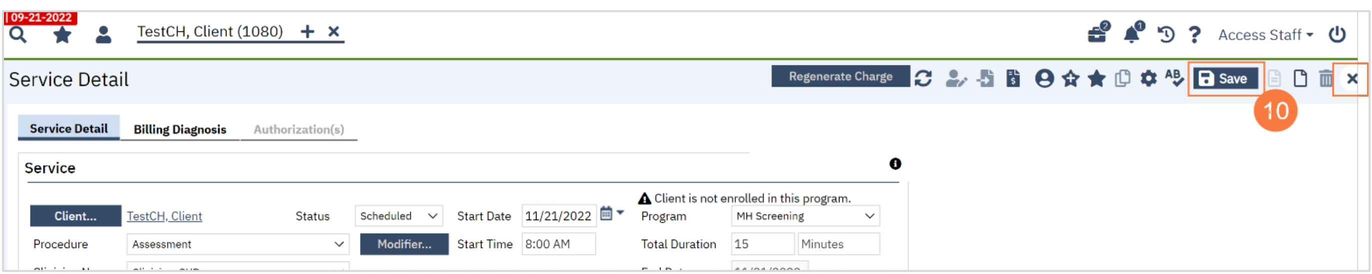
6. A list of available appointments will populate below, **click the Schedule Appt icon** next to the appointment time you want to choose.



7. The Service Detail window will open, **click the drop-down menu in the Program field** to select a program.
    - Note: If a client is not yet enrolled in the program, an alert will pop up. This will not keep you from scheduling this appointment.
8. **Click the drop-drown menu in the Procedure field and** select the appropriate option.
9. **Click the drop-down menu in the Location field and** select the appropriate location**.**

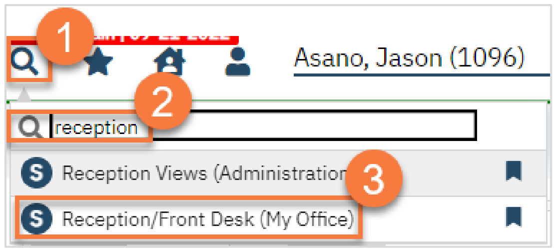


10. **Click Save** to schedule the appointment. **Click the X icon** to close this screen.

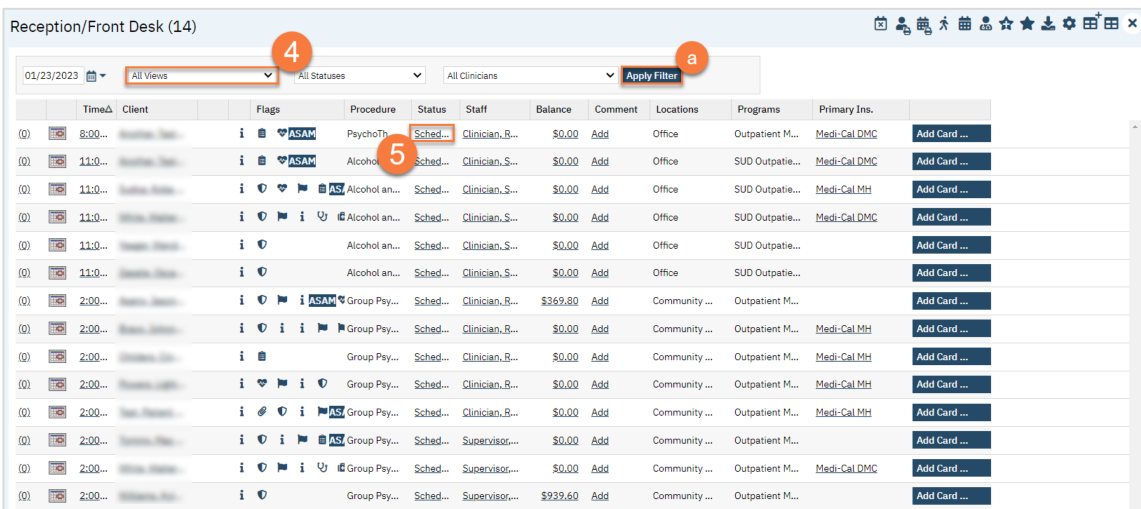


Reception View

1. **Click the Search icon**.
2. **Type "Reception"** in the search bar.
3. **Select "Reception/Front Desk (My Office)"** from the search results.



4. This will bring up the Reception/Front Desk view. **Select your program from the Views dropdown menu**. Your system administrator can set up the appropriate list for your location. If you've used this screen before, it should populate from the most recent view you used.
   a. **Click Apply Filter** to apply the view filter.
5. To check in a client, click the link in the Status column.

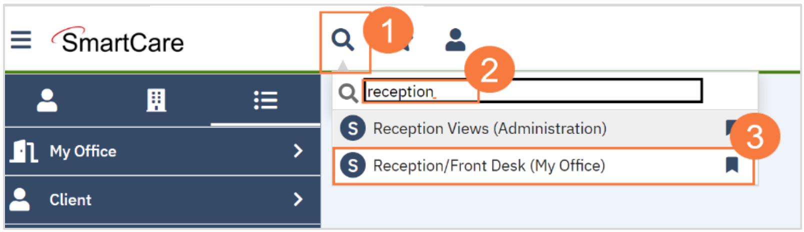


   a. This will bring up a pop-up window which auto-populates to "Show." **Click Change** to check the client in.

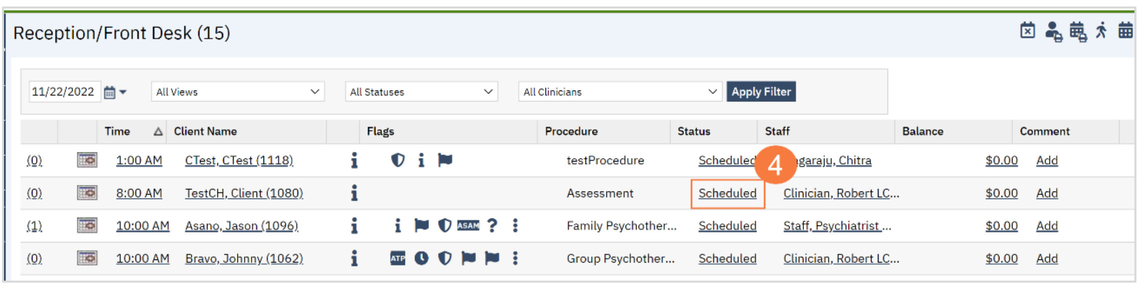
How to Cancel an Appointment

To document a cancelled appointment, follow the steps below:

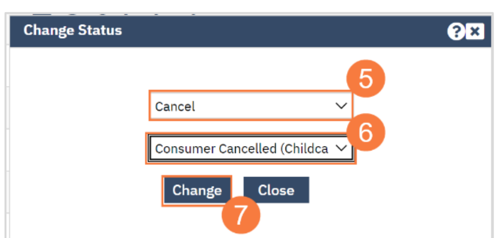
1. **Click the Search icon.**
2. **Type Reception** in the search bar.
3. **Click to select** Reception/Front Desk(My Office).



4. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. **Click on the Status field and the word Scheduled**.



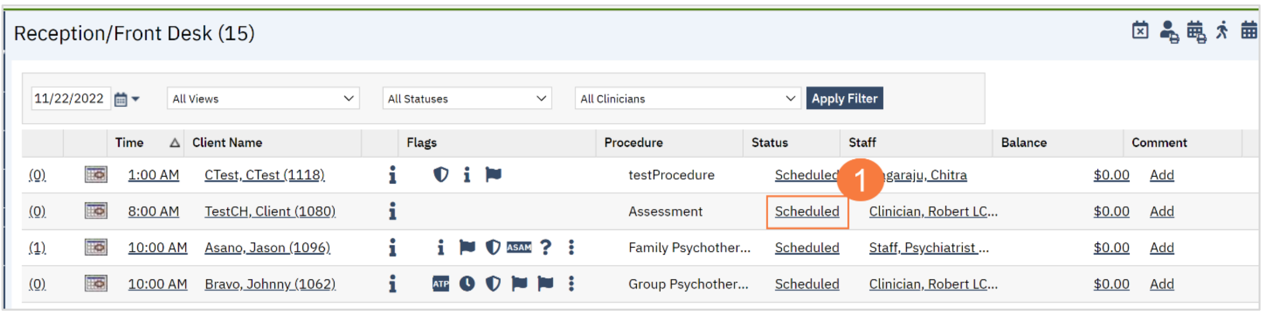
5. The Change Status window will open, **click the drop-down menu** and **select Cancel**.
6. Next you will be prompted to enter a cancel reason, **click the drop-down menu** and select the **appropriate option**.
7. **Click Change** to cancel the appointment. The status will now show as Cancelled.



How to Document a No-Show Appointment

To document a No-Show Appointment, follow the steps below:

1. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. Locate the Status field **and click the word Scheduled**.



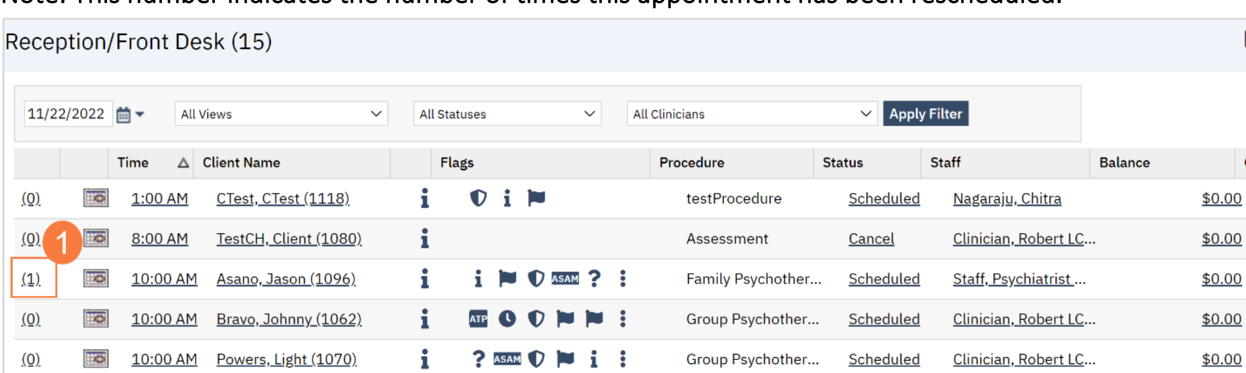
2. The Change Status window will open, **click the drop-down menu** and **select No Show**
3. **Click Change** to cancel the appointment. The status will now show as No Show.

How to Reschedule an Appointment

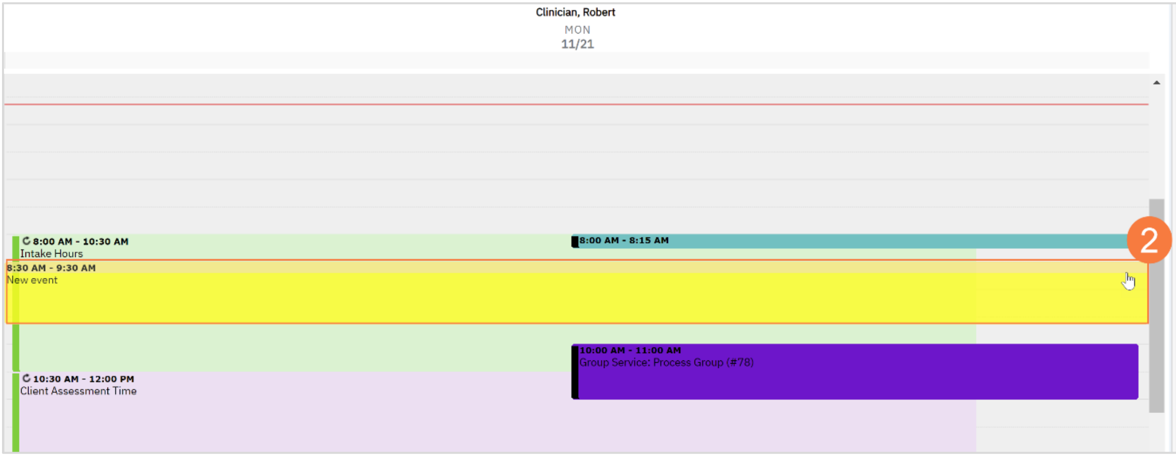
To reschedule an appointment, follow the steps below:

1. In the Reception/Front Desk screen, locate the correct client along with correct staff and appointment time. **Click the number in parenthesis** to the left of the appointment time.

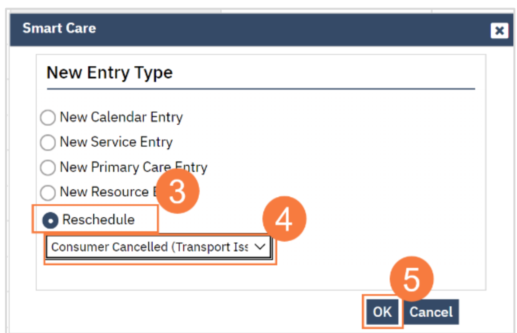
   Note: This number indicates the number of times this appointment has been rescheduled.



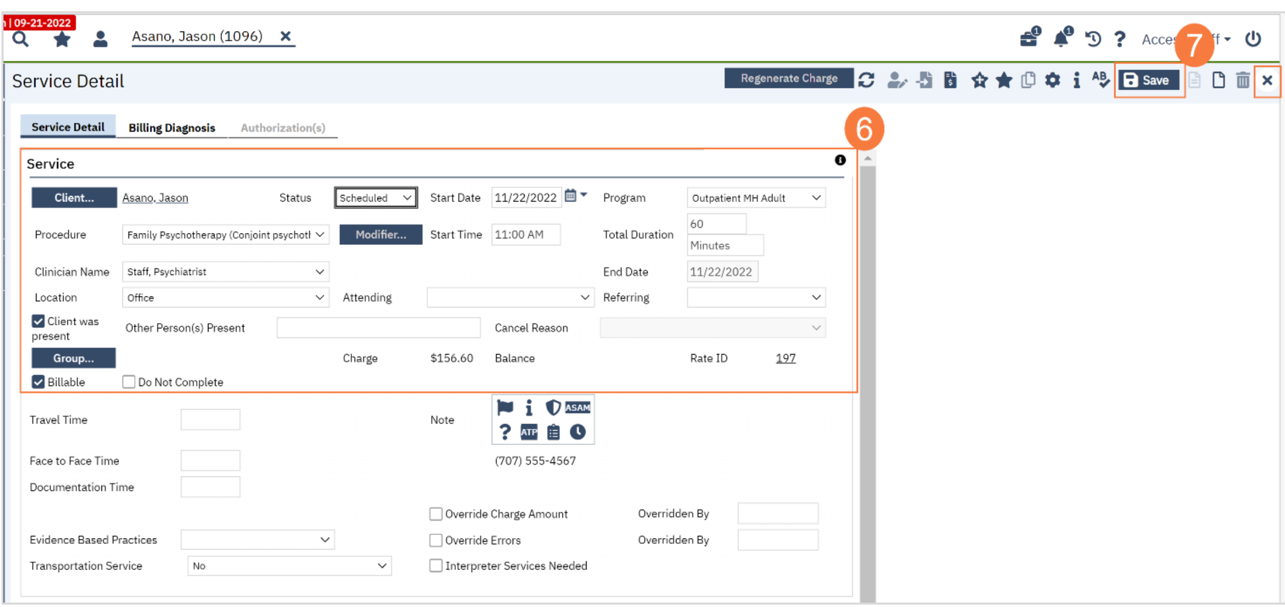
2. This will take you to the Staff Calendar screen to allow you to select a new appointment time. **Click and drag your mouse on the calendar timeslot** you want to book.



3. In the New Entry Type window, **click the radio button for Reschedule**.
4. **Click to select the reason** for the reschedule.
5. **Click OK**.



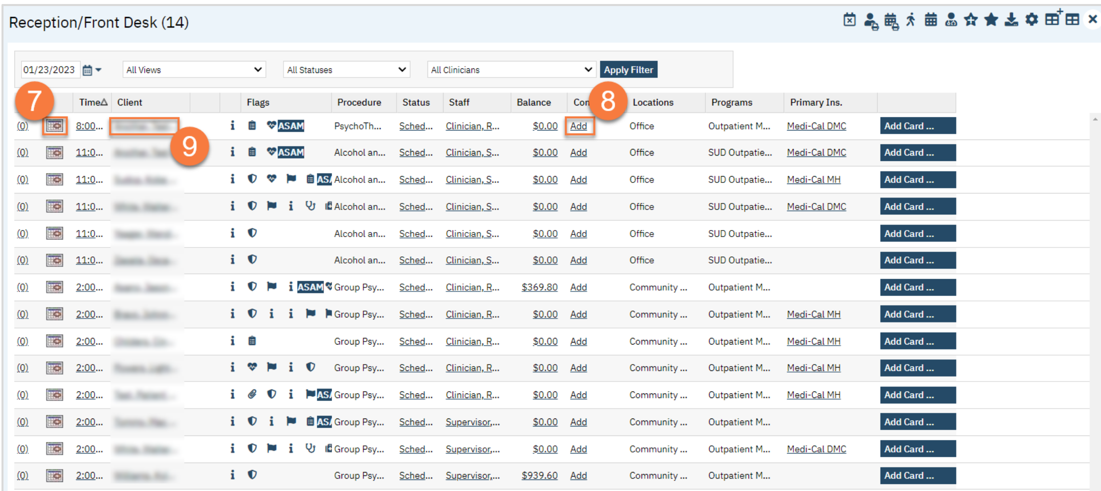
6. The Service Entry window will open, ensure all the information in correct
7. **Click Save** to reschedule the appointment. **Click the X** to close.



How to Schedule a Follow-up Appointment

To schedule a follow-up appointment, follow the steps below:

4. To schedule a follow-up for the client, click on the calendar icon. This will bring you to the Staff Calendar, where you can enter in a follow-up appointment.
5. You can add a comment to the service by clicking on the link in the Comment column.
6. To open the client's chart, click on the link in the Client column.

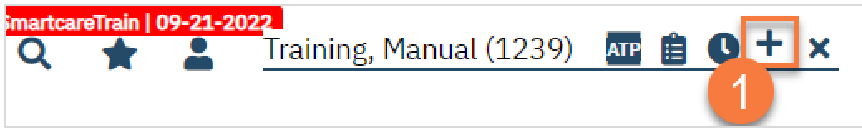


Other Functionality

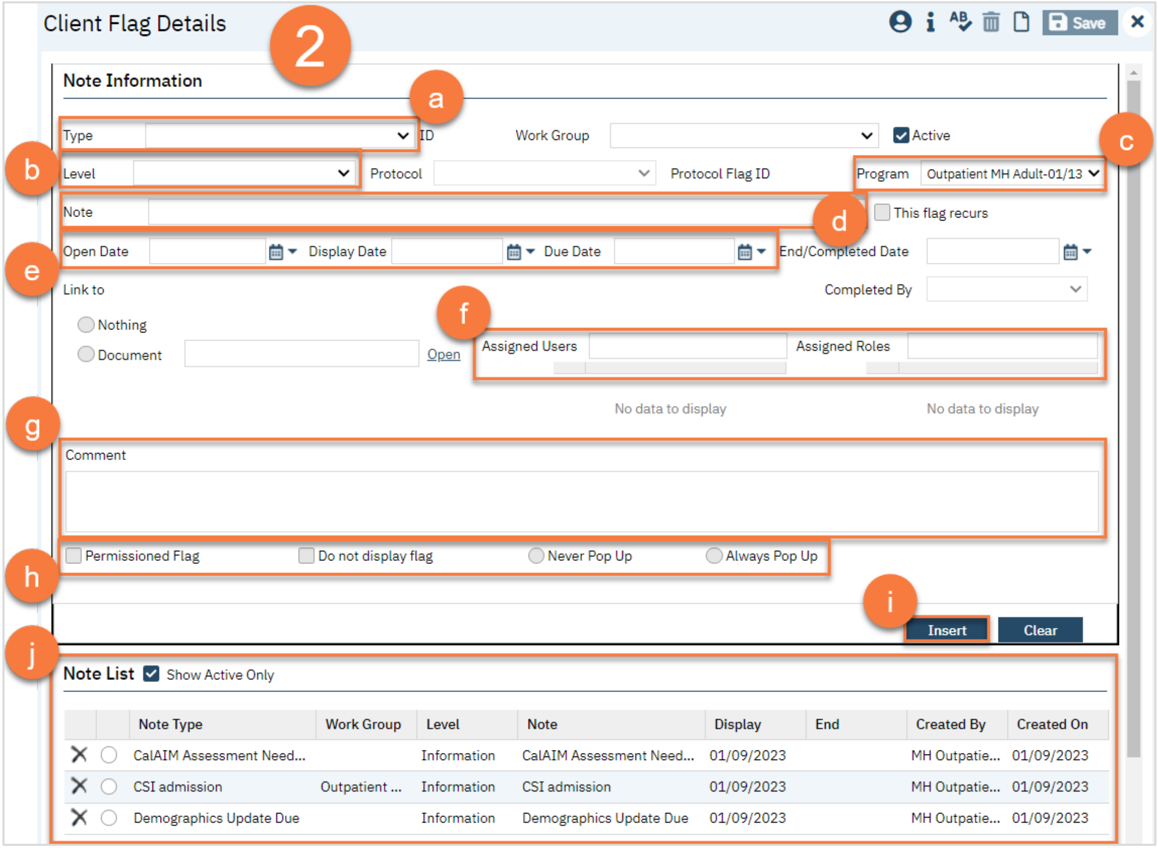
Introduction?

How do I create a flag to alert treatment team members to important client information?

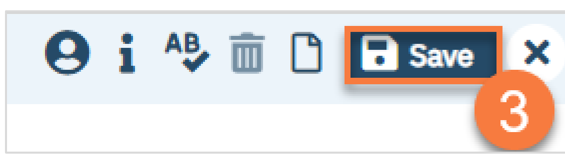
1. Make sure you have the client open. Click the plus icon next to the client's name.



2. This takes you to the Client Flag Details screen. **Add the relevant information in the Note Information section**. Your user role may only allow certain information to be completed. For example, a supervisor may have additional permissions that a clinician does not.
    a. **Select the type of flag**. Your system will have a list of flags to choose from.
    b. Make sure to **include your program**. This will ensure client privacy is upheld.
    c. **Select the level of the flag**. The options are: Information, Urgent, and Warning.
    d. Enter the specific language of the flag in the Note field.
    e. **Enter the display date**. If there is a due date, enter the Open Date (date it became available) and the Due Date (the date the task is due).
    f. If you need to assign this task to a specific user, you can enter that information in. You can also assign this task based on the treatment team role. An example would be to alert all nurses working with the client of a lab that's due.
    g. Enter any additional comments as needed.
    h. You can also choose how the flag is displayed. If you want this flag to show as a pop-up when opening the client's chart, make sure to mark "Always Pop Up."
    i. Once you've entered all the information, **click Insert**.
    j. This adds the flag to the Note List section at the bottom of the screen.



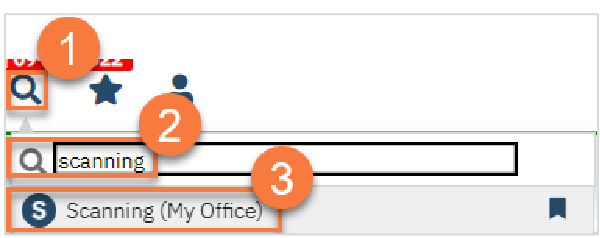
3. Once you've added all flags, **click Save**. You are now finished and may close this screen.



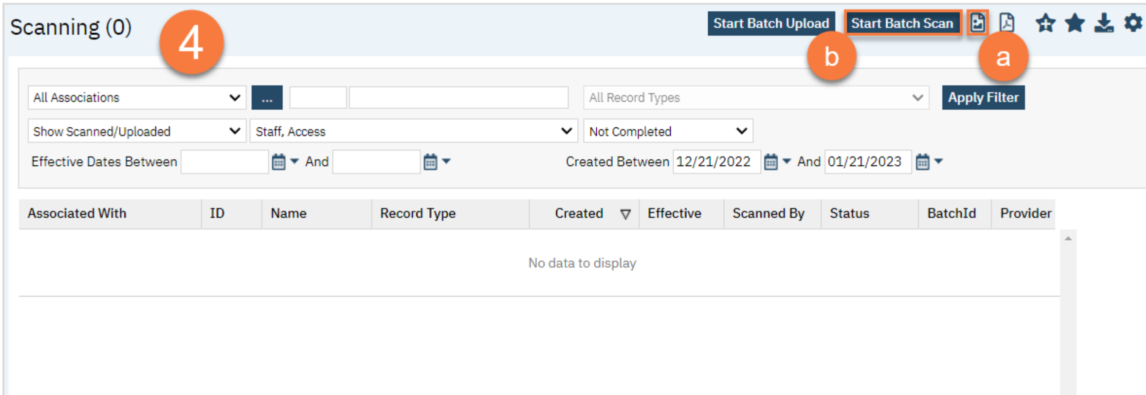
How do I scan a document into the client's record?

Sometimes documents are completed on paper, but need to be included in the client's record. In this section, we'll cover how to scan a document into the client's record.

1. Click the Search icon.
2. Type "Scanning" in the search bar.
3. Select "Scanning (My Office)" from the search results.



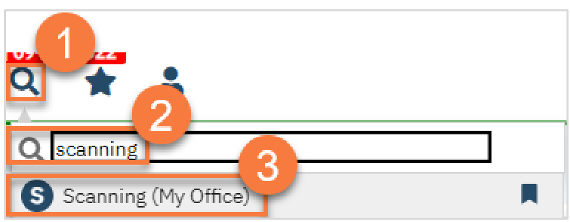
4. To scan, you need a scanner attached to your workstation. Scanning will use your scanner's software but save it in SmartCare.
    a. To scan a single document, click the "Scan New Images" icon.
    b. To scan multiple documents in a batch, click the "Start Scan Upload" button.



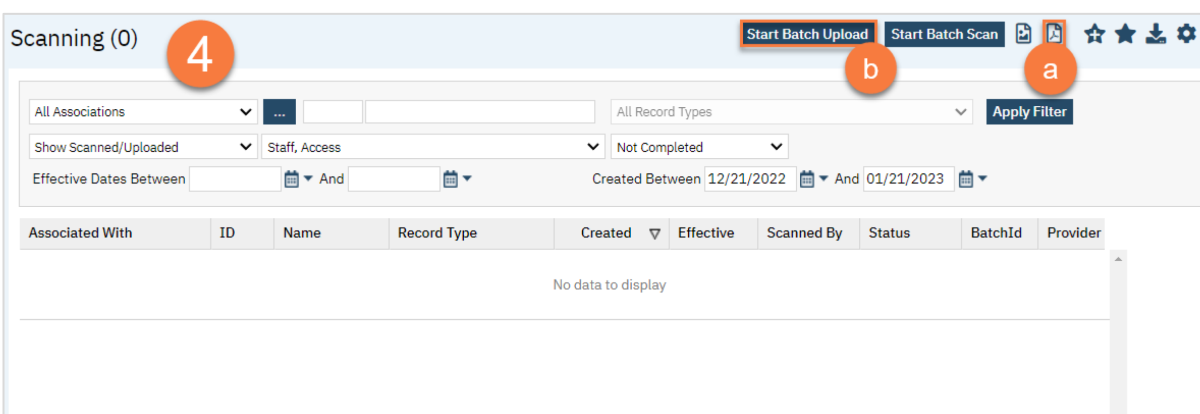
How do I upload a document into the client's record if I don't have a scanner?

Note: At this time, you can only upload documents that are in PDF file format.

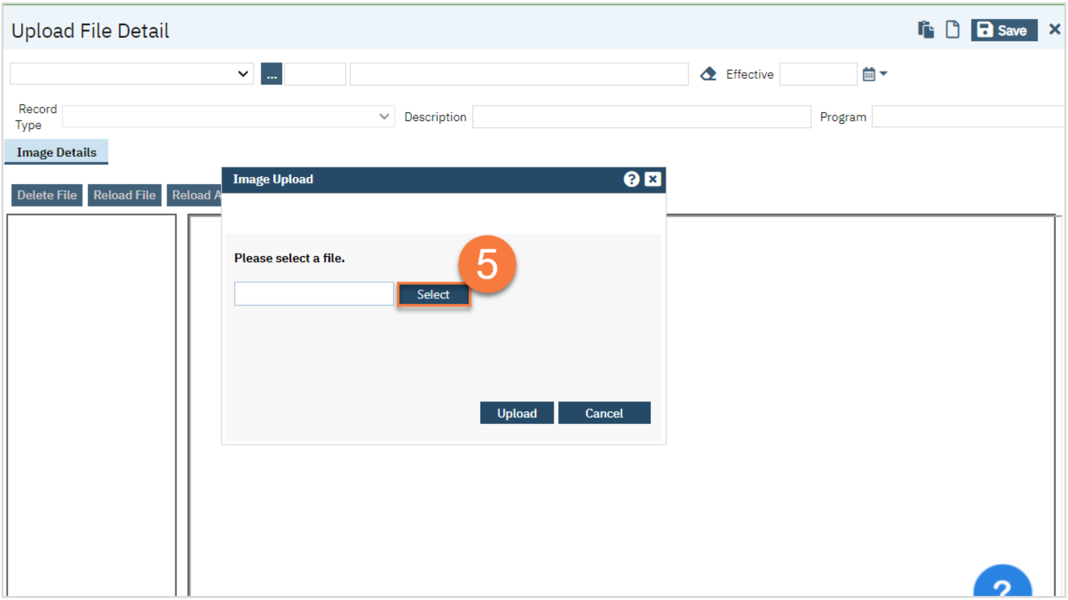
1. Click the Search icon.
2. Type "Scanning" in the search bar.
3. Select "Scanning (My Office)" from the search results.



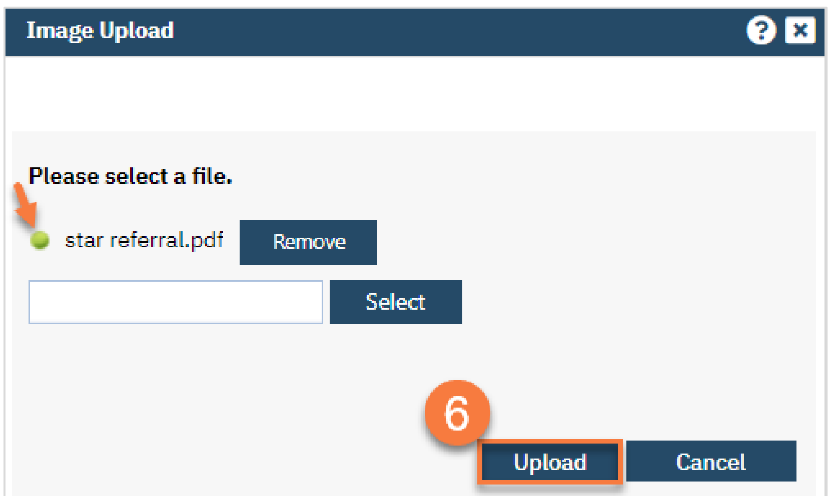
4. You can upload documents one at a time or as a batch.
    a. To upload a single document, click the "Upload New Images" icon.
    b. To upload multiple documents in a batch, click the "Start Batch Upload" button.



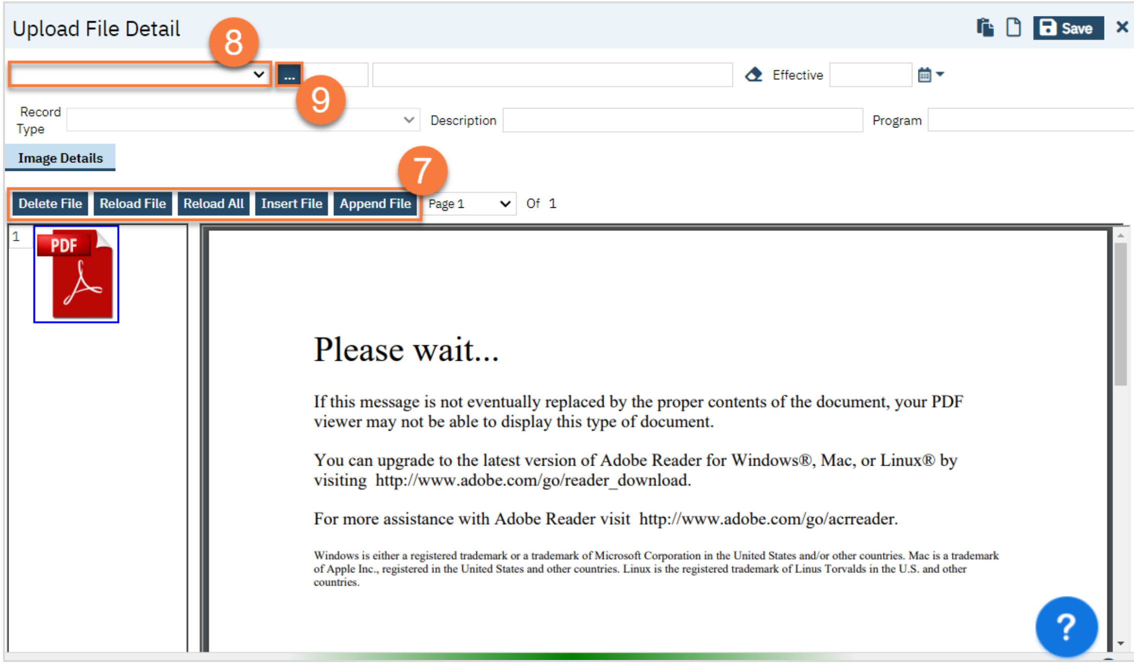
5. Choosing upload will open the Upload File Detail screen. This will include a pop-up. Click Select to find the file on your computer.



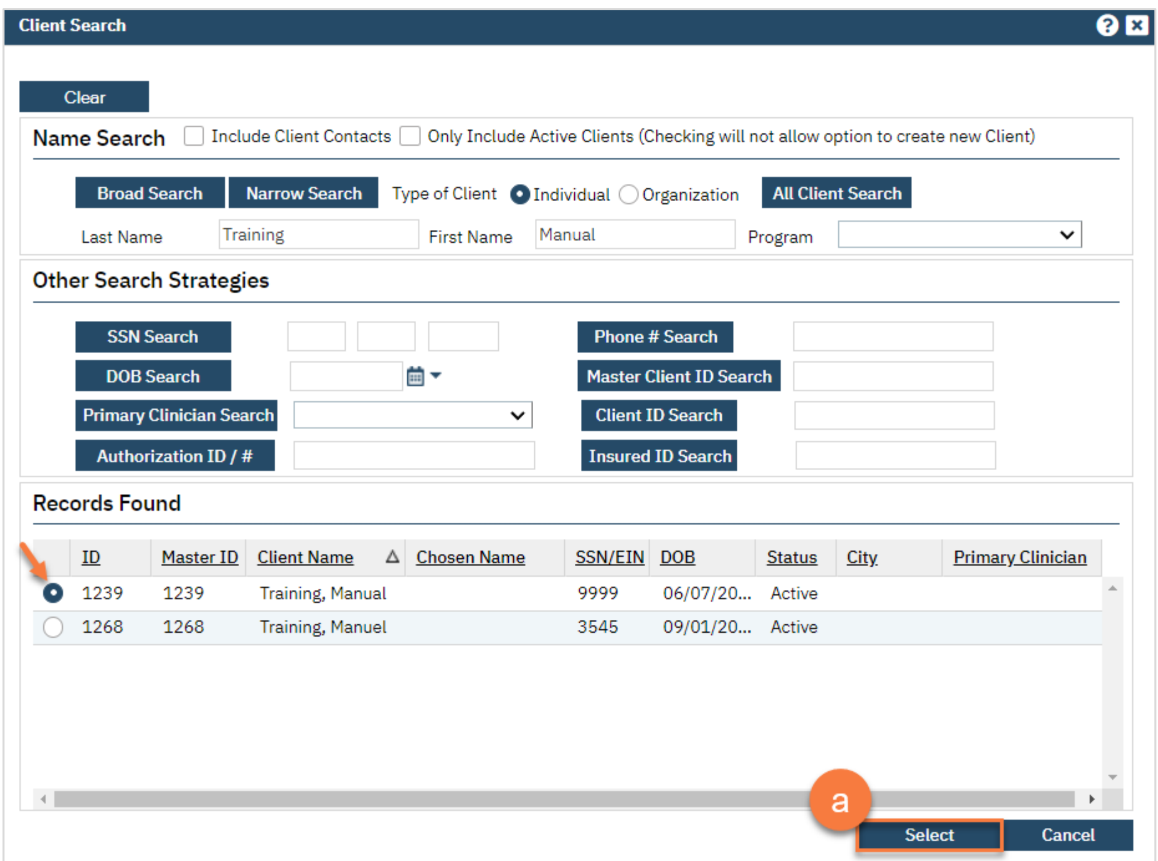
6. Once it's ready, a little green circle will appear next to it. **Click Upload**.



7. This will show you the PDF. Confirm you uploaded the correct document. **Make corrections as needed** using the buttons at the top of the PDF viewer.
8. **Select "Client (Medical Records)" from the first dropdown menu**.
9. **Click on the "…" button** to find the client.



a. This will bring up the client search. Use the client search to find the client. Click Select when you've located the client.



10. **Select the Record Type**.
11. **Enter the description** of the document.
12. **Enter the program** the document is associated with.

13. **Enter the Effective date** of the document.
14. **Click Save.**