Inpatient/Residential/CSU Set Up

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Overview

This guide will assist you with setting up your SETUP environment for inpatient, crisis stabilization units (CSU), and residential settings. This guide will reference Streamline set up guides you received from your implementation coordinator and videos that are available in https://2023.calmhsa.org/in-patient-residential-set-up/.

Document Change Record

Date	Version	Author	Change Details
5/22/23	1.2	Sarai Bowers	Order Set Up Appendix A & B
5/26/23	2.0	Sarai Bowers	Residential set up as Bedboard (not Bed Census) User Set Up section

Program Set Up

System Administration Guide provides detailed steps on how to create a program. Please reference that guide for details on creating a program. As a reminder, you may have the program already present through data conversion. Steps below are specific to set up the program for inpatient and residential. I have also referenced areas on conversion files that correspond to these fields.

1. To begin, navigate to Programs (Administration).
   a. **Click on the Search icon**.
   b. **Type Program**.
      i. Only three characters are required before options display.
   c. **Select Programs (Administration)** from the options.
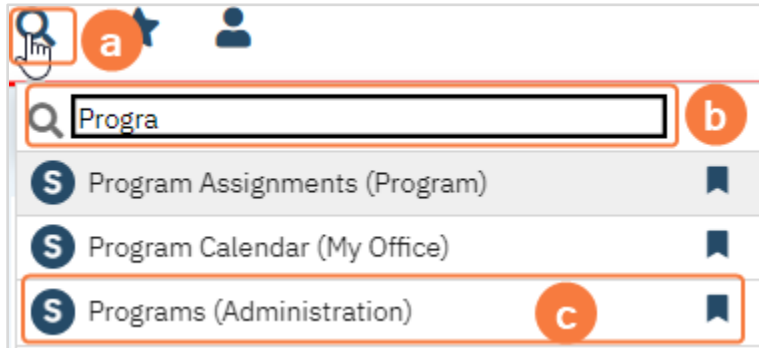
2. Once in the Program list page utilize filters to locate your program.
   a. Remember to **click the Apply Filter button** once you have selected your options.
3. Select program from Program Name column to open Program Details.

Program Name		Program Code	Service Area	# Enrolled	# Waiting	# Staff
Access Unit		Access Unit	MH	20	1	2
Adult Crisis Residential		Adult Crisis Residential	MH	11	0	
Adult Residential	3	Adult Residential	MH	9	0	1

4. As a reminder, ensure the program is added to a Clinical Data Access Group once the program has been created.

Inpatient Set Up

1. Once in Program Details, General tab > Categories section **select the following**:
   a. Inpatient Program
   b. Show in White Board
   c. Automatic Attendance For Bed Assignment
      i. When this is selected a charge will automatically be created for the bed via the census (bed occupied at midnight).
      ii. If this program should not have automatic attendance, do not select this box. Services will need to be created manually for each client.
      iii. Note: Bedboard, which is associated with Inpatient, does not allow an option for manual attendance.

d. Corresponding conversion file: Setup_Data_Programs
   i. Program Category: InpatientProgram, ShowInWhiteBoard, and AutomaticAttendanceForBedAssignment
   ii. Y indicates the checkbox would be selected.
   iii. Leaving this blank would indicate the checkbox is not selected.
e. You can select Create Service for Same Day Admit and Discharge is applicable.
   i. If this is selected, and the client is admitted and discharged on the same day, a charge will be created for the day via the census.
   ii. If it is not selected, then there will not be a charge created.
   iii. Corresponding conversion file: Setup_Data_Programs
      1. Program Category: CreateServiceForDischargeDate
      2. Y indicates the checkbox would be selected.
      3. Leaving this blank would indicate the checkbox is not selected.
2. In the General tab > MAR Setup section **select Client Order Meds**.

a. Corresponding conversion file: Setup_Data_Programs
   i. Program Category: MARClientOrderMedication
   ii. Y indicates the checkbox would be selected.
   iii. Leaving this blank would indicate the checkbox is not selected.

Supplemental References

Video: Basic SetUp Training Inpatient and Residential
MAR Set Up Guide, page 8

CSU Set Up

1. Once in Program Details, General tab > Categories section **select the following**:
   a. Inpatient Program
   b. Show in White Board

c. Corresponding conversion file: Setup_Data_Programs
   i. Program Category: InpatientProgram and ShowInWhiteBoard
   ii. Y indicates the checkbox would be selected.
   iii. Leaving this blank would indicate the checkbox is not selected.
d. Automatic Attendance would not be utilized for CSU's.
   i. Services need to be created manually due to time limitations and bundling needs.
   ii. This is covered in more details in the CSU Service Creation section.

2. In the General tab > MAR Setup section **select Client Order Meds**.

a. Corresponding conversion file: Setup_Data_Programs
   i. Program Category: MARClientOrderMedication
   ii. Y indicates the checkbox would be selected.
   iii. Leaving this blank would indicate the checkbox is not selected.

Supplemental References

Video: Basic SetUp Training Inpatient and Residential
MAR Set Up Guide, page 8

Residential Set Up

1. Once in Program Details, General tab > Categories section **select the following**:
   a. Inpatient Program
   b. Residential Program
   c. Show in White Board
   d. Automatic Attendance For Bed Assignment

e. Corresponding conversion file: Setup_Data_Programs
    i. Program Category: InpatientProgram, ResidentialProgram and ShowInWhiteBoard
    ii. Y indicates the checkbox would be selected.
    iii. Leaving this blank would indicate the checkbox is not selected.
f. If services can be automatically generated select Automatic Attendance For Bed Assignment.
    i. Consider the accuracy of the census. For example, is there a delay because information is provided by a contractor.
    ii. Corresponding conversion file: Setup_Data_Programs
        1. Program Category: AutomaticAttendanceForBedAssignment
        2. Y indicates the checkbox would be selected.
        3. Leaving this blank would indicate the checkbox is not selected.
    iii. If this is selected you can also select Create Service for Same Day Admit and Discharge is applicable.
        1. If this is selected, and the client is admitted and discharged on the same day, a charge will be created for the day via the census.
        2. If it is not selected, then there will not be a charge created
        3. Corresponding conversion file: Setup_Data_Programs
            a. Program Category: CreateServiceForDischargeDate
            b. Y indicates the checkbox would be selected.
            c. Leaving this blank would indicate the checkbox is not selected.
g. If services cannot be generated automatically, services would need to be generated manually through services, service bath entry, or service import.

2. In the General tab > MAR Setup section **select Prescribed Meds and Non Prescribed Meds**.

a. Corresponding conversion file: Setup_Data_Programs
    i. Program Category: MARPrescribedMedication and MARNonOrderedMedication
    ii. Y indicates the checkbox would be selected.
    iii. Leaving this blank would indicate the checkbox is not selected.

Supplemental References

Video: Basic SetUp Training Inpatient and Residential
MAR Set Up Guide, page 8

Units/Rooms/Beds

As a reminder, Units, Rooms, and Beds can be converted. Decision to do data conversion versus manual entry is based on the level of effort for either option. Below will incideate steps needed for set up. This will also include the corresponding sheet and reference for conversion.

1. Navigate to Units/Rooms/Beds (Administration).
   a. **Click on the Search icon**.
   b. **Type Units**.
      i. Only three characters are required before options display.
   c. **Select Units/Rooms/Beds (Administration)** from the options.
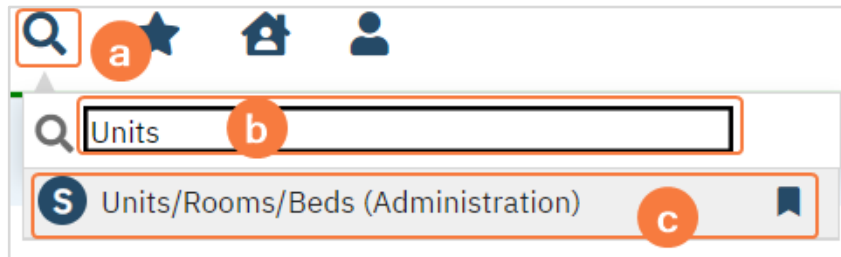
Unit Set Up

Unit needs to be set up for every type of setting (inpatient, CSU, and residential).

1. **Click the New Unit icon** in the tool bar to open Unit Details.

Inpatient Set Up

1. **Enter the Unit Name**. This will automatically copy over to Display As.
   a. If you would like the display as to be different feel free to change it. This is the name the end user will see.
   b. Corresponding conversion file: Setup_Data_Units
      i. Column Name: UnitName and DisplayAs
2. Active checkbox would default to be checked. This should remain as is.
   a. This would only be deselected if the Unit is no longer utilized.
   b. If deselected you should enter an Inactive Reason.
   c. Corresponding conversion file: Setup_Data_Units
      i. Column Name: Active and InactiveReason
      ii. Active: Y indicates the checkbox would be selected or leaving this blank would indicate the checkbox is not selected.
      iii. InactiveReason: CodeId associated to UNITINACTIVEREASON global code.
3. Licensed Bed Capacity should be completed if there is a bed capacity.
   a. This will show in parentheses next to bed capacity.
   b. Corresponding conversion file: Setup_Data_Units
      i. Column Name: LicensedBedCapacity, enter integer.
4. **Select Show on Bed Board and Show on Whiteboard checkboxes**.
   a. Corresponding conversion file: Setup_Data_Units
      i. Column Name: ShowOnBedBoard and ShowOnWhiteBoard
      ii. Y indicates the checkbox would be selected.

        iii.   Leaving this blank would indicate the checkbox is not selected.

5. In the Availability section **enter a Start Date**, this is the date the unit has become active.
   a. You can backdate this date.
6. End Date should only be entered if the unit was no longer active.
7. **Click Insert**. This information will not display in the Availability History section.

8. **Click Save in the tool bar**, upper right hand corner.
9. If additional units are needed **click New icon** and repeat the steps above.

CSU Set Up

1. **Enter the Unit Name**. This will automatically copy over to Display As.
   a. If you would like the display as to be different feel free to change it. This is the name the end user will see.
   b. Corresponding conversion file: Setup_Data_Units
      i. Column Name: UnitName and DisplayAs
2. Active checkbox would default to be checked. This should remain as is.
   a. This would only be deselected if the Unit is no longer utilized.
   b. If deselected you should enter an Inactive Reason.
   c. Corresponding conversion file: Setup_Data_Units
      i. Column Name: Active and InactiveReason
      ii. Active: Y indicates the checkbox would be selected or leaving this blank would indicate the checkbox is not selected.
      iii. InactiveReason: CodeId associated to UNITINACTIVEREASON global code.
3. Licensed Bed Capacity should be completed if there is a bed capacity.
   a. Corresponding conversion file: Setup_Data_Units
      i. Column Name: LicensedBedCapacity, enter integer.
4. **Select Show on Bed Board and Show on Whiteboard checkboxes**.
   a. Corresponding conversion file: Setup_Data_Units
      i. Column Name: ShowOnBedBoard and ShowOnWhiteBoard
      ii. Y indicates the checkbox would be selected.
      iii. Leaving this blank would indicate the checkbox is not selected.

5. In the Availability section **enter a Start Date**, this is the date the unit has become active.
   a. You can backdate this date.
6. End Date should only be entered if the unit was no longer active.
7. **Click Insert**. This information will not display in the Availability History section.

8. **Click Save in the tool bar**, upper right hand corner.
9. If additional units are needed **click New icon** and repeat the steps above.

Residential Set Up

1. **Enter the Unit Name**. This will automatically copy over to Display As.
   a. If you would like the display as to be different feel free to change it. This is the name the end user will see.
   b. Corresponding conversion file: Setup_Data_Units
      i. Column Name: UnitName and DisplayAs
2. Active checkbox would default to be checked. This should remain as is.
   a. This would only be deselected if the Unit is no longer utilized.
   b. If deselected you should enter an Inactive Reason.
   c. Corresponding conversion file: Setup_Data_Units
      i. Column Name: Active and InactiveReason
      ii. Active: Y indicates the checkbox would be selected or leaving this blank would indicate the checkbox is not selected.
      iii. InactiveReason: CodeId associated to UNITINACTIVEREASON global code.
3. Licensed Bed Capacity should be completed if there is a bed capacity.
   a. Corresponding conversion file: Setup_Data_Units
      i. Column Name: LicensedBedCapacity, enter integer.
4. **Select Show on Bed Board and Show on Whiteboard checkboxes**.
   a. Corresponding conversion file: Setup_Data_Units
      i. Column Name: ShowOnBedBoard and ShowOnWhiteBoard
      ii. Y indicates the checkbox would be selected.
      iii. Leaving this blank would indicate the checkbox is not selected.

5. In the Availability section **enter a Start Date**, this is the date the unit has become active.
   a. You can backdate this date.
6. End Date should only be entered if the unit was no longer active.
7. **Click Insert**. This information will not display in the Availability History section.

8. **Click Save in the tool bar**, upper right hand corner.
9. If additional units are needed **click New icon** and repeat the steps above.


Supplemental References

Video: Basic SetUp Training Inpatient and Residential
Video: Additional Bedboard/Bed Census/Whiteboard Set Up
Unit_Rooms_Beds guide, Set Up a Unit section (SmartCare Guide)

Room Set Up

Room(s) needs to be set up for every unit. The set up for the room does not differ between settings (IP, CSU, Residential), but do need to ensure the correct rooms are set up for the correct unit.

1. **Click the New Room icon** in the tool bar to open Room Details.

   a. If you are no longer in the Units/Rooms/Beds screen follow step 1 in the Units/Rooms/Beds section.
2. **Enter the Room Name**. This will automatically copy over to Display As.
   a. If you would like the display as to be different feel free to change it. This is the name the end user will see.
   b. Corresponding conversion file: Setup_Data_Rooms
      i. Column Name: RoomName and DisplayAs
3. **Select Unit from dropdown options**. This will display created units.
   a. Ensure you select the correct unit which should correspond to the room.
   b. Corresponding conversion file: Setup_Data_Rooms
      i. Column Name: UnitId, enter the Id number associated with the unit.
4. Active checkbox would default to be checked. This should remain as is.
   a. This would only be deselected if the Room is no longer utilized.
   b. If deselected you should enter an Inactive Reason.
   c. Corresponding conversion file: Setup_Data_Rooms
      i. Column Name: Active and InactiveReason
      ii. Active: Y indicates the checkbox would be selected or leaving this blank would indicate the checkbox is not selected.
      iii. InactiveReason: CodeId associated to BEDINACTIVEREASON global code.

5. Classroom checkbox and Program dropdown are utilized for a separate functionality; do not use these fields.
   a. The corresponding columns in the conversion file (Setup_Data_Rooms) should be left blank.
6. In the Availability section **enter a Start Date**, this is the date the room has become active.
   a. You can backdate this date.
   b. End Date should only be entered if the room was no longer active.
7. **Click Insert**. This information will not display in the Availability History section.

8. **Click Save in the tool bar**, upper right hand corner.
9. If additional rooms are needed **click New icon** and repeat the steps above.

Supplemental References

Video: Basic SetUp Training Inpatient and Residential
Video: Additional Bedboard/Bed Census/Whiteboard Set Up
Unit_Rooms_Beds guide, Set Up a Room section (SmartCare Guide)

Bed Set Up

Bed(s) needs to be set up for every room. Beds are set up for every type of setting (inpatient, CSU, and residential).

1. **Click the New Bed icon** in the tool bar to open Bed Details.
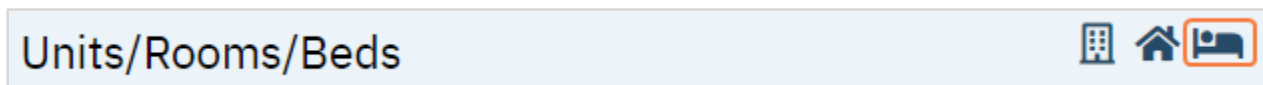
2. If you are no longer in the Units/Rooms/Beds screen follow step 1 in the Units/Rooms/Beds section.

General Section Set Up

General section set up is similar for all settings (inpatient, CSU, and residential). The expectation may be some CSU's reported they do not have beds. If this is the case, consider beds openings in the CSU when following the steps below.
1. **Enter the Bed Name**. This will automatically copy over to Display As.
   a. If you would like the display as to be different feel free to change it. This is the name the end user will see.
   b. Corresponding conversion file: Setup_Data_Beds.

i. Column Name: BedName and DisplayAs
2. Active checkbox would default to be checked. This should remain as is.
   a. This would only be deselected if the bed is no longer utilized.
   b. If deselected you should enter an Inactive Reason.
   c. Corresponding conversion file: Setup_Data_Beds
      i. Column Name: Active and InactiveReason
      ii. Active: Y indicates the checkbox would be selected or leaving this blank would indicate the checkbox is not selected.
      iii. InactiveReason: CodeId associated to BEDINACTIVEREASON global code.
3. **Select Unit from dropdown options**. This will display created units.
4. **Select Room from dropdown options**. This will display created rooms that have been associated with the selected unit, previous step.
   a. Ensure you select the correct room which should correspond to the bed.
   b. Corresponding conversion file: Setup_Data_Beds
      i. Column Name: RoomId, enter the Id number associated with the room.
5. Type 1-4 can define the types of beds this is.
   a. Select options as needed, fields can be left blank.
   b. Type 1-4 are visible in Bed Search and can assist with locating a bed.

c. Corresponding conversion file: Setup_Data_Beds
   i. Column Name: Type1, Type2, Type3, Type4
   ii. Select CodeId associated to BedType1, BedType2, BedType3, and BedType4 global codes, respectively.

6. Click Save and Continue to Availability Section.

Availability Section Set Up

1. **Enter a Start Date and Time**, this is the date the bed has become active.
   a. You can backdate this field if needed.
2. End Date and Time should only be entered if the unit was no longer active.
3. **Select a Leave Procedure from the dropdown**.

a. This is the default code that will display when a client is placed on leave from the bed. However, this code can be changed by the end user.

Census Management - On Leave

Activity

... 1313	Kent, Clark	DOB:	04/08/1988

Action: On Leave   Leave Start Date: 05/07/2023

Program: Oliver Ln - Residential

Bed: Oliver - Rm 2 Bed 1 (Adult)

Unit: Oliver Ln - Residential

Room: Oliver Ln Rm 2

Admission Type: Urgent   Admission Source: 1 - Non-Health Ci

Assignment Type: Assignment Type 1   Reason:

Location: Residential   Billing Procedure: Bed Leave

Clinician: Buckley, Christine   Physician:

    i. In other words, select the code that would apply the majority of the time.

b. Many times this code is a non-billable code. However, this may vary by setting, funder, or other situations.

c. Leave Procedure will only display procedure codes that have Bed Procedure Code selected in Procedure Code Details.

Procedure Type

☐ Medication Procedure Code   ☐ Bed Procedure Code
☐ Attendance Service Procedure Code   ☐ Allow Attachments to Service
☐ Crisis

4. **Select Program from the dropdown**.
    a. Dropdown will display programs where Inpatient Program or Residential Program is selected in Program Details.

Categories

☐ Inpatient Program   ☐ Residential Program
☐ After School Program   ☐ Show In White Board
☐ Bed Admission Requires Order   ☐ Bed Discharge Requires Order
☐ Automatic Attendance For Bed Assignment
☐ Primary Care Program
☐ Create Service for Same Day Admit and Discharge

5. **Select Procedure from the dropdown**.
    a. CSU's should reference the CSU Service Creation section for details related to completing this field.

b. Residential programs should follow steps below if they are set up as Automatic Attendance (see Residential Set Up section) . Otherwise, complete set up from CSU Service Creation section.

c. This is the default code that will display when a client is admitted to and occupying a bed. However, this code can be changed by the end user.

Census Management - Admit

Activity

| | 1308 | Haro, Bisou | DOB: | 03/09/2000 |

Action: Admit

Admit Date: 05/07/2023 Time: 1:22 PM

Arrival Date: Time: 00:00

Program: Oliver Ln - Residential

Bed: Oliver - Rm 1 Bed 1 (Adult)

Unit: Oliver Ln - Residential

Room: Oliver Ln Rm 1

Admission Type: Admission Source:

Assignment Type: Reason:

Location: Residential Billing Procedure: Bed Day

Clinician: Physician:

OR

Census Management – Billing Code Change

Activity

Action: Billing Procedure Change

Start Date: Time: Billing Procedure: Bed Day

Comments

Modify   Cancel

  i. In other words, select the code that would apply the majority of the time.

d. If the program was set up for automatic attendance, see Programs section, the procedure associated with the occupied bed will be the procedure code associated with the automatically generated service.

i. In many cases this would be the procedure selected in this set up, unless it is changed by an end user.

   e. As a reminder, Procedure associated with the bed is still dependent on setup and rules associated with the procedure.

   f. Procedure will only display procedure codes that have Bed Procedure Code selected in Procedure Code Details.

Procedure Type

☐ Medication Procedure Code   ☐ Bed Procedure Code
☐ Attendance Service Procedure Code ☐ Allow Attachments to Service
☐ Crisis

6. **Select Location from the dropdown**.
   a. Dropdown will populate all locations in the system. Ensure you select the correct location.
   b. Location will populate for the service which is associated with place of service.
   c. To verify a location POS see Location Details.
   d. Additionally, the location should also be associated with the program for continuity.
      i. See the Program section for details.
7. **Click Insert**. This information will not display in the Availability History section.

Availability

| Start Date | | 📅 ▾ Time: | | End Date | | 📅 ▾ Time: | | Leave Procedure | ▾ |
| Program | ▾ | Procedure | ▾ | Location | ▾ |

(1) (3) (4) (5) (6) (7) Insert   Clear

8. **Click Save in the tool bar**, upper right hand corner.
9. If additional beds are needed **click the New icon** and repeat the steps, starting with General Section Set Up.

⚙ ❓ ᴬᴮ✔ (9) 🗎 💾 Save (8)

CSU Service Creation

Crisis units are limited to 23 hours and bundling rules. Due to these factors services cannot be generated through bed attendance/census, services would need to be manually generated.

Availability

| Start Date | | 📅 ▾ Time: | | End Date | | 📅 ▾ Time: | | Leave Procedure | ▾ |
| Program | ▾ | Procedure | ▾ | Location | ▾ |

Insert   Clear

1. It is recommended the Procedure associated with the bed be a non-billable code.
   a. Even though the unit has been set up to not have automatic attendance it is still recommended a non-billable code be used as the procedure.
2. Ensure the correct procedures are associated with the program so services can be created.
   a. Procedures and programs can be linked in Procedure Code Details or Program Details.
3. Services can be created through Service Details, Batch Service Entry, or Service Import.

Supplemental References

Video: Basic SetUp Training Inpatient and Residential
Video: Additional Bedboard/Bed Census/Whiteboard Set Up
Unit_Rooms_Beds guide, Set Up a Bed section (SmartCare Guide)

Orders Set Up

Before orders can be created for clients in the EHR, they need to be set up in SmartCare. While CalMHSA has created some orders, it is likely that you will need to modify these or create new ones. This guide provides details on the things to consider when setting up orders. The Supplemental References section includes additional resources, such as user manuals and training materials, that may be helpful in the order setup process.

Note: Orders is a separate SmartCare subscription and may not be available in your county. Reach out to your Implementation Coordinator if you have any questions.

General Order Set Up

This section will cover items that are common for the majority of order types. Sections/fields that are unique to specific orders will be covered in the Order Set Up for Different Types section.

Creating and Saving a New Order

1. Navigate to Order Setup (Administration).
    a. **Click on the Search icon**.
    b. **Type Order Setup**.
        i. Only three characters are required before options display.
    c. **Select Order Setup (Administration)** from the options.
    d. Ensure you go to Setup and not Sets
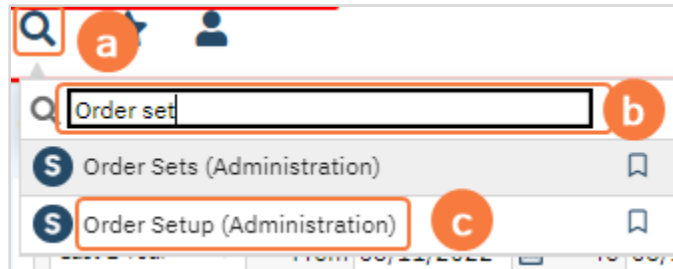
2. You will be in the Order Setup screen. **Click the new icon** in the tool bar.
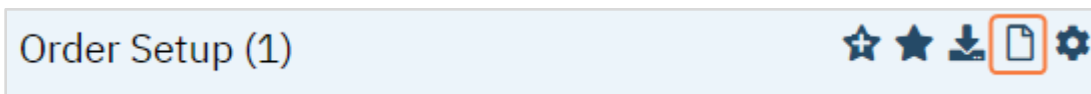
3. This will open the Order Details screen.
4. Once you have created your order, based on fields below, **click Save in the tool bar**.

Order Setup

1. Order Type is your first selection.
   a. Fields and sections below will differ by order types.
      i. See sections below for specific changes related to order types.
   b. Note: Activity would not be used in IP, CSU, and Residential settings.
2. Procedure Code will create a service when order is entered.
   a. This feature will be available in the future.
3. Active will default to checked.
   a. Checkbox should be blank if at any point the order is no longer active.
4. Order Name is the name the user would search for to enter the order.
   a. If Cannot Modify Order Name is selected, this name cannot be changed.
5. Alternate Name and Brand Name will also display in search and should be used if applicable.
   a. For example, if you are renaming orders from your legacy system but still want users to be able to find the order using the old name, you can enter the old name in the Alternate Name field. When users search for the order using the legacy name, the system will display the relevant order based on the entry in the Alternate Name field

Priorities

Priorities identify the rank of the order in proportion to other orders for end users.

1. To add priority **select an option from the dropdown** and **click Add button**.
   a. Repeat this step as needed.

2. Options associated will display when the user is creating the order and are present in orders list pages.

3. Priority is meant to document and does not have any logic.

Schedule

Schedule defines the start date and time and end date/time that can be utilized with the order. Options that are entered in this set up are options the user will see when creating a client order.

1. To add a schedule **select an option from the dropdown** and **click Add button**.
   a. Repeat this step as needed.

2. Based on schedule options the Start and End fields will change or have carry over logic.
   a. Today: Start date and time are inactive for the user.
      i. Start date and time will default to date and time the order is created after it is signed.

   b. Now and Scheduled: Start date and time are inactive for the user.
      i. This options is used for orders that will appear on the MAR (Medication Administration Record).
      ii. When selected it will queue an administration at the current time before reverting to set up of the frequency.
         1. See Frequency section for details.
      iii. For example, TID medication is scheduled for administration at 8:00 am, 1:00 pm, and 8:00 pm. If the order is entered at 9:00 pm and Now + Scheduled is selected, the MAR will show administration for 9:00 pm and will then revert to regular TID frequency.

   c. Standing Administered Once: Start date and time are inactive for the user.
      i. Start date and time will default to date and time the order is created after it is signed.

  ii. This is used for orders that need to have action taken once and apply through the admission.

    1. For example, providing a walker. The walker is provided to the client and remains with the client until discharge.

Start:	Standing Administ ⌄	📅 ▾	End:	📅 ▾

  d. Other: Start and End date and time are active and can be entered by the user.

Start:	Other ⌄	📅 ▾	End:	📅 ▾

  e. When equipment is received: Start and End date and time are active and can be entered by the user.

    i. This should be used if order is dependent on equipment. There is no logic associated to this but used to identify this dependency.

Start:	When equipment i: ⌄	📅 ▾	End:	📅 ▾

Frequencies

Frequencies define the frequency (directions) that can be utilized with the order. Options that are entered in this set up are options the user will see when creating a client order.

Frequencies

Frequencies		⌄	Add	New

	Default	Display Name	Frequencies	Dispense Times
		No data to display		

1. Frequencies are dependent on Order Template Frequencies.
  a. Please review the Order Template Frequencies Set Up section before continuing with this section.
2. Frequencies can be be created from this section by clicking New. They can also be edited by clicking the hyperlink of the Display Name.
  a. However, it is recommended that all frequencies get established in Order Template Frequencies.

Options

Options are additional functionality that can be added to an order. The options that display will vary by order type; see Appendix A for a table of all options and corresponding order types. Below will list all options for the majority of orders. For options to specific orders see Order Set Up for Different Types section.

Options

Order can be completed	○ Yes	● No
Order can be pended	○ Yes	● No
Order rationale	○ Yes	● No
Order Comments	○ Yes	● No
Whiteboard Observations	○ Yes	● No
Diagnosis Required	○ Yes	● No
Whiteboard Legal	○ Yes	● No
Whiteboard Level	○ Yes	● No
Billable	○ Yes	● No
Add Order to MAR	○ Yes	● No
Prescription Required?	○ Yes	● No
Permissioned?	○ Yes	● No
Sensitive Order	○ Yes	● No
Quick Order	○ Yes	● No
Medications category	[▼]	
Display Program?	○ Yes	● No

1. Order can be completed: This allows an order to have an option of complete status.

Order Status	Complete ▼

2. Order can be pended: This will allow an order to be pended.
   a. When marked as Yes a role will be required to release the pending order.

Acknowledgement

Role [▼] ☐ Acknowledge ☐ Acknowledgement Required ☐ Pending Release ☐ Signature Required [Add]

☐ All Acknowledgements Required

Role	Acknowledge	Acknowledgement Required	Pending Release	Signature Required
		No data to display		

   b. Pend Order will display for the user when order is created.

☐ Pend Order ☐ Preference ☐ Discontinued

   c. Order that the user has marked as Pend Order will appear with Status of Action Required and in Unauthorized Order column in the whiteboard.
      i. The selected role(s), in step 2.a. will be able to release the pending order.

3. Order rationale: When Yes, Rational field will display in order entry.

Frequency:	[ ]				
Start:	Standing Administ ▼	[ ] 📅 ▼ [ ]	End:	[ ] 📅 ▼ [ ]
Rationale:	[▼]	[ ]		

4. Order Comments: When Yes, the Comment field will display in order entry.

5. Whiteboard Observations: Order will display in the Observation column of the Whiteboard.

6. Billable: This feature is currently in design and not available at the moment.
7. Add Order to MAR: Selecting Yes will display the order in the MAR.
    a. Whenever an order will show on the MAR, ensure Frequencies and associated templates are set up as needed.
    b. As a reminder, orders have to be set up to show in the MAR in Program Details in addition to selecting Yes.
        i. See Programs Set Up section for details.
    c. See Appendix B for decision tree if order should be added to the MAR or not.
8. Prescription Required?: This is currently not in use and does not have any logic.
9. Permissioned? When order is marked as Yes, order will appear in Role Definition and can be permissioned to specific role(s).

    a. Only roles that have the order permission granted can create and see the order.
10. Sensitive Order: Yes indicates the order is a sensitive order. Sensitive orders cannot be added to an Order Set.
    a. When a sensitive order is generated with a non-sensitive order it will generate its own order.
11. Quick Order: Yes will allow the order to be created through Quick Orders. Quick Orders can still be created through regular order entry.
    a. Quick Orders can be found in the Search icon.
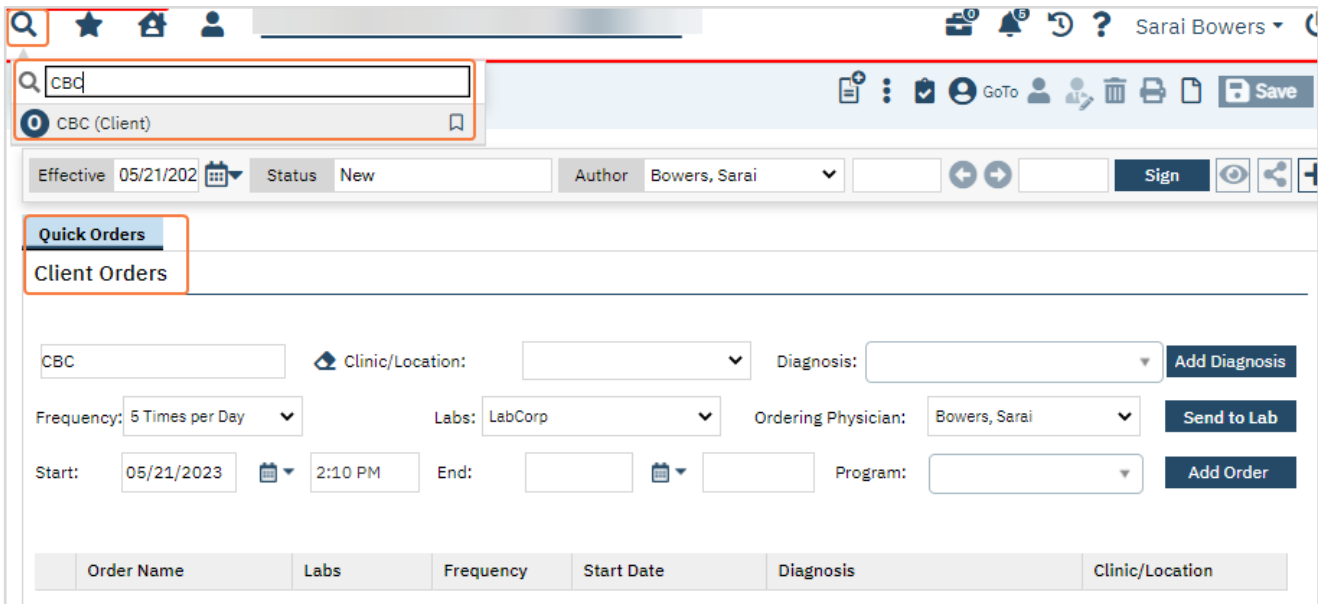
b. Quick Orders can be created through the Psychiatric Note.

c. Quick Orders cannot be added to Order Sets.

12. Medications category: A dropdown will display category options. This is only to group type of orders into a category.

13. Display Program: When Yes is selected a dropdown will appear to indicate if program selection can be single-select or multi-select.

a. On order entry, users will see a Program option.

Questions

Question section allows questions to be associated with an order. This is not required but available when applicable. Multiple questions can be created as needed.

1. Question # field would hold the question the end user would see.

2. In Answer Type you select options for how the user would answer the questions.

a. Add Flowsheet: when selected Global Code Category will display Health Data Elements that are used in flow sheets.

   i. Users would see the entry as set up in the element.

   ii. Note: when a user answers the question it will not push the response to the corresponding flow sheet.

      1. If you would like the order to show on the flow sheet, the user should go directly to the flow sheet and complete it.

b. Radio Button: when selected, you will need to select Global Code Category.

   i. Global code options will display as radio buttons.

   ii. Note: Radio buttons are single-select options.

c. Check Box: when selected, you will need to select Global Code Category.

   i. Global code options will display as checkboxes.

ii.   Note: checkboxes are multi-select options.
    d. Text Box: will display a character text box for the user to type into.
    e. Drop Down: will display a dropdown when answering the question.
        i.   You will need to select a Global Code Category.
    f. Multi Line Text Box: similar to above, this will display a textbox. However, this will be multi-lines versus single-line.
    g. Date: will display a date field.
    h. Date & Time: will display a date and time field.
3. Required: select checkbox if answer has to be answered.
4. Global Code Category should be completed based on Answer Type.
    a. Required for Add Flowsheet, Radio Button, Check Box, and Drop Down Answer Types.
5. Laboratories: Field is only active with Order Type is Labs and is set up by Streamline when there is an interface.
6. Question Code: Field is only active with Order Type is Labs and is set up by Streamline when there is an interface.
    a. This would indicate if the lab is providing the question.
7. Show question at the time of: need to select between Administration, Ordering, or Both.
    a. Administration means the question would show when the order is being administered through the MAR. This should only be selected if Add Order to MAR is Yes.
    b. Ordering would mean the question displays when the order is being created for the client.
8. If you need to create additional questions click Add Additional Questions and repeat steps 1-7.

Acknowledgement

Acknowledgement should be set up if an order needs to be acknowledged. See Appendix B for a decision tree as to whether an order should be acknowledged or not. Follow steps below if an order needs to be set up to be acknowledged.

Note: Acknowledgement orders will appear under the Unauthorized Orders column in the Whiteboard.

1. Role: Select the role that should acknowledge the order.
    a. Roles are user roles not Treatment Team roles.
2. Checkboxes indicate what type(s) of acknowledgement should occur for the role.
    a. Acknowledge checkbox indicates the role needs to acknowledge the order
    b. Acknowledge Required checkbox indicates the order cannot proceed until it is acknowledged.
    c. Pending Release checkbox should be used when Order can be pended is yes.
        i.   See Options section, #2.
    d. Signature Required indicates a signature from the role is needed before proceeding.
3. All Acknowledgement Required should be selected all indicated roles completed acknowledgement.
    a. For example, if you indicate a medical role and prescriber role as acknowledgement. When this checkbox is not selected either of these roles acknowledging will meet acknowledgement criteria. However, if checkbox is selected, acknowledgement will not be completed until both roles acknowledge the order.
4. Click Add to add the acknowledgement.

5. Repeat steps 1-4 for additional roles as needed.

Supplemental References

Video: Setting Up Questions and Acknowledgements on Orders
Orders and Order Sets User Guide (SmartCare Guide)

Order Template Frequencies Set Up

Order Template Frequencies is used to define an administration time based on the frequency/direction associated with an order and/or medication. SmartCare's MAR can display more than medication orders. It can display any orders identified as showing on the MAR (e.g. vitals). It is important to keep this in mind when creating order template frequencies. As a reminder, orders and medication appearing on the MAR are dependent on program set up (MAR Setup section), client being enrolled into the set up program, and order set up (Add order to MAR field).

Note: CalMHSA has created templates in your set up. You can modify and create new ones to meet your business needs.

1. Navigate to Order Template Frequencies (Administration).
   a. **Click on the Search icon**.
   b. **Type Order Template Frequencies**.
      i. Only three characters are required before options display.
   c. **Select Order Template Frequencies (Administration)** from the options.
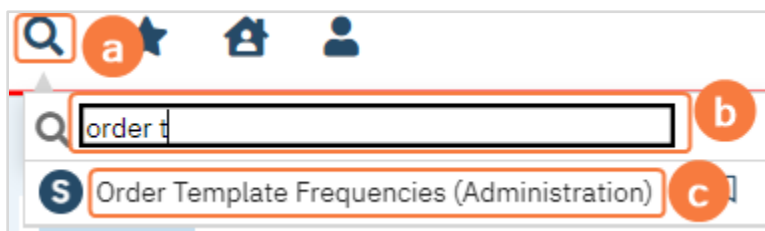
2. In the tool bar click the New icon to create a new template or click the hyperlink in the Template Name column to open an existing template.

3. See Fields in Order Template Frequencies section on how to complete these fields.
4. Once fields have been completed **click Save in the tool bar**.
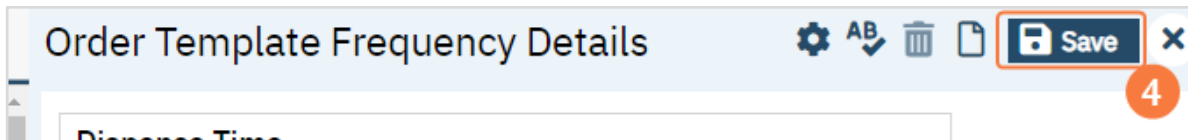
Fields in Order Template Frequencies

This section explains each field within the Order Template Frequency Details screen.

1. **Enter a Dispense Name**.
   a. This is the Frequency name the users would see when creating an order through Client Orders.
2. **Select a SmartCare Frequency** from the dropdown.
3. **Select an option from Map With Rx Frequency** dropdown.
   a. These dropdowns are the same options that appear in SmartCareRx, Directions fields.

4. Times Per Day is a display only field, it will display a number if Map With Rx Frequency selection is associated with timed dispenses.
   a. For example: Once a Day and Bedtime would display "1" in this field. Three times a day (TID) would display "3" in this field.
5. Dispense Time fields activate based on the Times Per Day option. **Enter administration time into the available fields**.
   a. For example: if Rx Frequency is TID, Times Per Day will be 3 and you can enter 8:00 am, 1:00 pm, and 8:00 pm. If this medication or other order type is set to show on the MAR, it will indicate medication can be administered at these corresponding times.
      i. The exception to this is Now + Scheduled option; see Schedule section for details.
   b. Note: Dispense Time fields will inactivate when PRN checkbox is selected; see # 6
   c. Note: Frequencies associated to a Dispense time will <u>always</u> show to administer at the time indicated. This is also true for Q#H orders. For example a Q4H order with a Start Time of 2:15 pm will not show to be administered at 6:15 pm. It will always correspond to time indicated in this set up.
      i. However, a user can modify the times at time of ordering using a clock icon, see 5.d.
   d. Users can modify these times through use of the clock icon.
      i. Clock icon will appear at time of ordering
         1. Planned to be available for go-live.
      ii. Clock icon on the MAR screen.
   e. Rx Frequency of Q1H (Every 1 Hour) and Q2H (Every 2 Hours) do not have enough active fields for every hour and 2 hours. Users need to be trained to change these times when placing an order in the clock po-up.
      i. See 5.d for details.
6. PRN checkbox should be selected when a medication is a PRN.
   a. Once this is checked the Dispense Time fields become inactive.
   b. Note: The MAR will block the PRN time windows. For example, administration occurred at 10:00 am and frequency is QID PRN (every 6 hours), the next administration cannot occur until 3:00 pm.
7. No Frequency checkbox should be selected if this template does not have a frequency.
   a. This would blank out and inactivate the Times Per Day and Dispense Time fields.
8. **Select Rx Default checkbox**. This field needs to be selected for the order to show in MAR.
9. Select Days checkbox activates based on Map With Rx Frequency option, e.g. Every 2 weeks.
   a. When selected, users entering the order will see a Select Days of Week hyperlink and when selected a pop-up will appear.
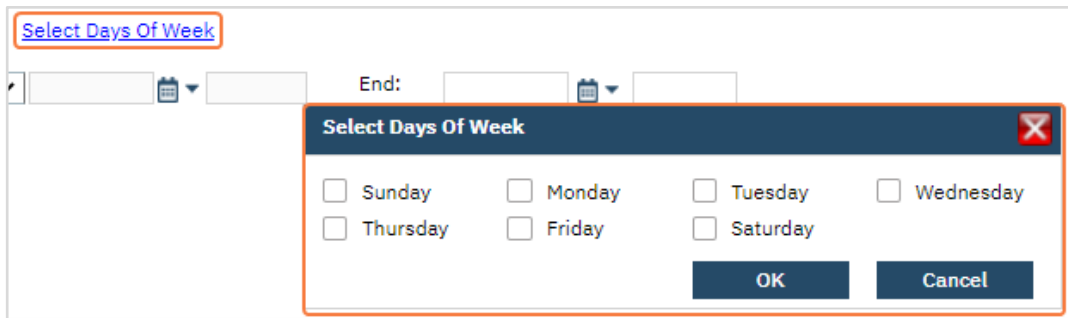
10. One Time Only checkbox should be selected when administration should only occur once.
    a. When selected SmartCare Frequency and Map With Rx Frequency will inactivate.
11. Activity should never be selected. Activity is not used in IP, CSU, and Residential settings.

12. See Order Template Frequencies Set Up, #4 for saving directions.

Supplemental References

MAR Set Up Guide (SmartCare Guide)

Video: Setting Up Order Template Frequencies

Order Set Up for Different Types

Order set up includes order types and based on the Order Type selected different options can appear in the Order Detail screen. Sections below cover differences for different Order Types.

Medication

Medication type is used to create medication orders. Below are items that were not covered in the General Order Set Up section.

Note: Medication orders can be created as adhoc orders for users.

1. The Order Setup section includes Medication Search, Administration Time Window, and Stock Medication fields.
   a. **Type into Medication Search the medication you are looking for and select from options**. Options will display as you search.
      i. Note: Medications displayed come from First Databank. Job to have the latest medications from First Databank will only run in your SETUP/PROD environment.
   b. Administration Time Window indicates the window of time the medication can be administered.
      i. The system defaults to 60 minutes for the administration window. However, the option attached to the order will override the system window.
   c. Stock Medication, when selected, identifies to dispense the medication from the stock supply stored at the unit.

2. Strengths indicate the strengths the medication can be ordered with. Users will only see the strength you incideate in this set up.
   a. To add a strength **select an option from the dropdown** and **click the Add button**.

      i. Preferred NDC can be selected if needed.
         1. If selected an information icon will appear next to the strength field, in order entry, and will display educational information when hovered over.
3. Route indicates the route to be used when administering the medication.
   a. Note: Route options displayed are dependent on the medication selected.
   b. To add a route **select an option from the dropdown** and **click the Add button**.

4. Medication orders have different Options that display, and some that default.

a. Order rational and Order Comments will default to yes and cannot be modified. Add Order to MAR will default to Yes and can be modified.

b. Dual Sign Required: When yes, at time of administration user will have to enter their password and an additional user will need to enter their username and password at time of administration.

c. Self Administered: When yes, May Self Administer checkbox will automatically be selected when order is created. User can remove checkbox selection.

d. Consent Required: When yes, consent checkbox in order entry will automatically be checked. When checked medication cannot be administered until a consent is signed.

e. Pain Level Required?: When yes, pain level will need to be entered at time of administration.

f. Multiple Admins Allowed Within Hour: When yes, users will be able to administer medication more than once within an hour.
   i. Note: MAR will not alert for more than what frequency is set but they system will not prevent a medication from being administered within the hour.

g. Titration/Taper?: When yes, Titration/Taper button will appear in next to insert. User can click Titration/Taper to identify each step.
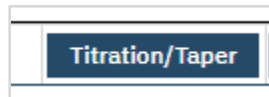
h. Medication Assisted Treatment (MAT), Machine Connection Required, and Take Home Allowed are for MAT functionality and not being used at this time.

Additional

Additional orders tend to be used for items related to legal and do not appear on the MAR. Below are items that were not covered in the General Order Set Up section.

1. Diagnoses indicate the diagnoses that populate the dropdown in order entry. Users can select from these diagnoses or use a different diagnosis.

a. To add a diagnosis, type **a code or a description into the corresponding fields**, a diagnosis pop-up window will appear. **Select the correct diagnosis and click the OK button**.

2. Additional orders have different Options that display.

a. Diagnosis Required: When yes, a diagnosis will be required in the order before being able to sign it.
b. Whiteboard Legal: When yes, the Legal field will appear in the order entry screen and will carry over to the Whiteboard.

c. Whiteboard Level: When yes, the Level field will appear in the order entry screen and will carry over to the Whiteboard.
   i. Level is not used at this time.

Adaptive Equipment

Adaptive Equipment orders should be used for adaptive equipment. Below are items that were not covered in the General Order Set Up section.

1. Diagnoses indicate the diagnoses that populate the dropdown in order entry. Users can select from these diagnoses or use a different diagnosis.

a. To add a diagnosis, type **a code or a description into the corresponding fields**, a diagnosis pop-up window will appear. **Select the correct diagnosis and click the OK button**.

2. Additional orders have different Options that display.

    a. Diagnosis Required: When yes, a diagnosis will be required in the order before being able to sign it.

    b. Whiteboard Legal: When yes, the Legal field will appear in the order entry screen and will carry over to the Whiteboard.

    c. Whiteboard Level: When yes, the Level field will appear in the order entry screen and will carry over to the Whiteboard.

        i. Level is not used at this time.

Labs

Below are items that are specific to Lab orders and were not covered in the General Order Set Up section.

Note: Lab orders are created by Streamline when their is a lab interface. It is created from your compendium.

1. The Order Setup section includes Health Data Template, this allows you to add a flow sheet to the order so results can be entered or carried over to the flow sheet.

a. Only templates/flow sheets set up as Lab Order = Yes can be searched for in this field.
b. To add a template, **type the template name in Health Data Template field and select it from options**. Options will display as you search.
c. This field is not required.
2. Laboratories section appear but would only be used if you have a lab interface.
a. This would be set up by Streamline.

3. Diagnoses indicate the diagnoses that populate the dropdown in order entry. Users can select from these diagnoses or use a different diagnosis.

a. To add a diagnosis, type **a code or a description into the corresponding fields**, a diagnosis pop-up window will appear. **Select the correct diagnosis and click the OK button**.

4. Lab orders have different Options that display.

Options

Order can be completed	○ Yes	● No
Order can be pended	○ Yes	● No
Order rationale	○ Yes	● No
Order Comments	○ Yes	● No
Whiteboard Observations	○ Yes	● No
Diagnosis Required	○ Yes	● No
Billable	○ Yes	● No
Add Order to MAR	○ Yes	● No
Prescription Required?	○ Yes	● No
Permissioned?	○ Yes	● No
Sensitive Order	○ Yes	● No
Draw from Service Center	○ Yes	● No
Quick Order	○ Yes	● No
Medication Assisted Treatment (MAT)?	○ Yes	● No
Medications category	⌄	
Display Program?	○ Yes	● No
Clinic/Location(default)	⌄	

a. Diagnosis Required: When yes, a diagnosis will be required in the order before being able to sign it.

b. Draw from Service Center: When yes, Draw From Service Center field will appear at time of Order Entry indicating that draw should occur.

☐ Draw From Service Center

c. Clinic/Location (default) is set up when a lab interface is present.
     i.   This is set up by Streamline.

d. Medication Assisted Treatment (MAT) is not utilized at this time.

Safety Check

Safety Check orders are orders that appear in the Whiteboard under Next Check and Last Check columns; the indicate the time based on the frequency. Below are items that are specific to Lab orders and were not covered in the General Order Set Up section.

1. The Order Setup section includes Health Data Template and # of Minutes field

  a. Health Data Template allows you to add a flow sheet to the order. This flow sheet template will appear while documenting checks.
    i. Only templates/flow sheets identified as Safety Checks can be searched for in this field.
    ii. To add a template, **type the template name in Health Data Template field and select it from options**. Options will display as you search.
    iii. This field is not required.
  b. # of minutes is the increments at which the safety check should occur. For example, Q15 checks should have 15 in the fields.
    i. **Type the frequency of the checks into the field**.
2. Safety checks do not have a Frequencies section as the frequency is tied to the # of Minutes field.
3. Safety orders have less Options that display, however they do have Diagnosis Required option.

  a. Diagnosis Required: When yes, a diagnosis will be required in the order before being able to sign it.

Dietary

Dietary order was an option added specifically for CalMHSA, however there is no logic specifically for this. For this reason Dietary orders shows almost all options within the system; including options that are specific to Activity orders (which is not used for these settings). For setting up Dietary orders stay with options within General Order Set Up and Additional sections.

Supplemental References

Video: Setting up Medication Orders

Video: Setting up Additional Nursing Orders
Video: Setting up Safety Check Orders
Orders and Order Sets User Guide (SmartCare Guide)

Order Sets

Order Sets allows you to group multiple orders into a set. Note: users will still need to complete the fields for each order set (e.g. enter the Frequency and Schedule).
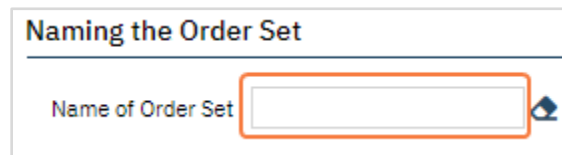
1. To create an Order Set navigate to Order Sets (Administration).
   a. **Click on the Search icon.**
   b. **Type Order Sets.**
      i. Only three characters are required before options display.
   c. **Select Order Sets (Administration)** from the options.
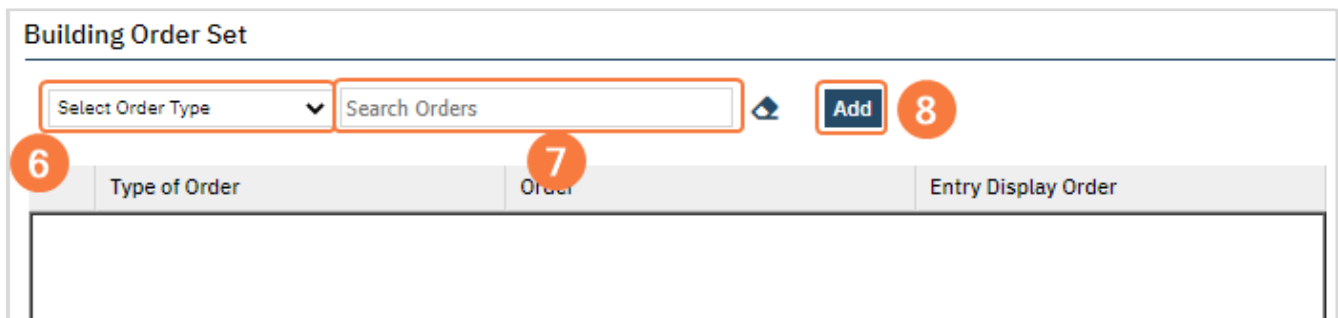   d. Ensure you go to Sets and not Setup
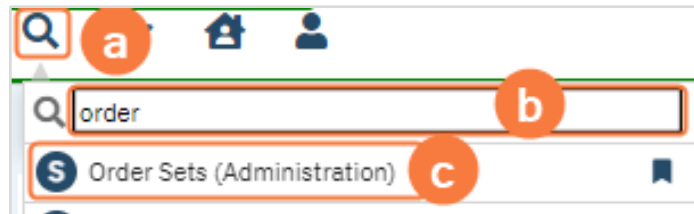
2. You will be in the Order Sets screen. **Click the new icon** in the tool bar.
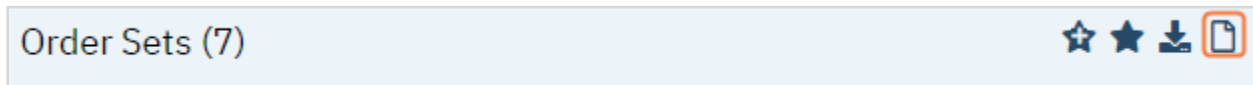
3. This will open the Order Set Details screen.
4. **Enter the name of the order set into Name of Order Set field.**

5. Order will default to Active.
   a. This should only be unchecked when order set is no longer needed.
6. In Building Order Set **select order type from Select Order Type dropdown**.
7. In Search Orders field, **type name of the order**. As you type options will display, **select the correct order**.
8. **Click Add**.

9. Repeat steps 6-8 as needed.
10. Once done, **click Save in the tool bar**.

Supplemental References

Video: Setting Up Sets

Orders and Order Sets User Guide (SmartCare Guide)

User Set Up

Users need to be set up so they can access screens and documents specific to IP/CSU/Residential. As a reminder, this set up is specific to this module and does not include general set up, e.g. degrees, CDAG, etc.

1. Navigate to Staff/Users (Administration).
   a. **Click on the Search icon**.
   b. **Type Users**.
      i. Only three characters are required before options display.
   c. **Select Staff/Users (Administration)** from the options.
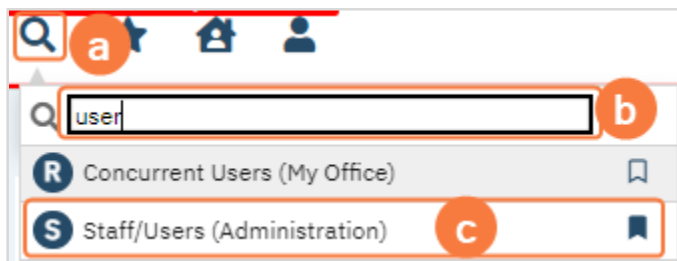
2. Once on the Staff/Users list page, utilize filters to locate the user.
3. **Click on the Staff Name hyperlink** to open Staff Details.
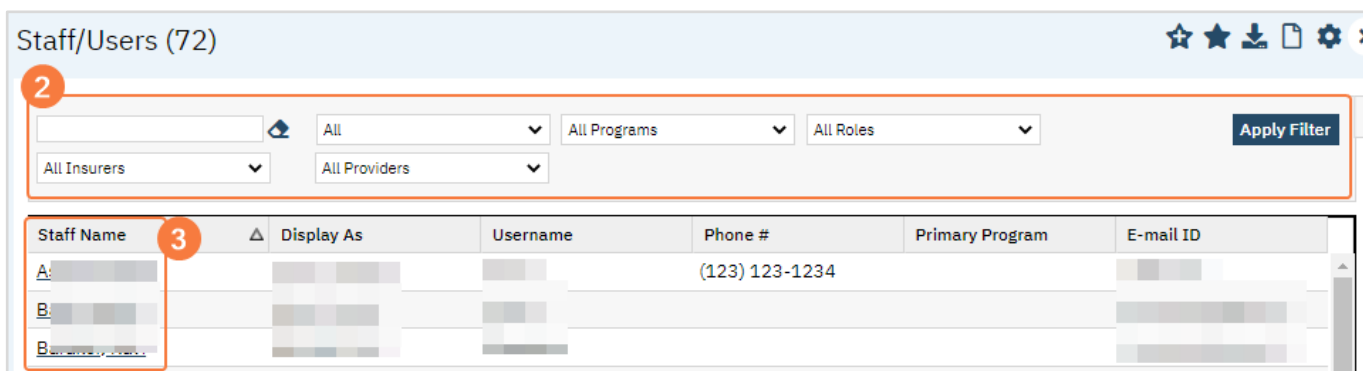
Roles/Permissions

1. Roles have been created for IP/CSU/Res programs.
   a. These are add on roles and should be used in addition to base roles. Following are county base roles:
      i. LPHA/Clinician
      ii. Non-LPHA
      iii. Reception/Front Desk
      iv. Billing
      v. County Affiliated System Admin
      vi. Medical Record/Quality Assurance
2. **Click the Roles/Permissions tab**.
3. **Select Grant radio button for IP/CSU/Res role**.
   a. All inpatient, CSU, or residential users should have this role.
4. If appropriate, **Select Grant radio button to the Medical IP/CSU/Res role**.
   a. This role should be used in addition to the IP/CSU/Res role.
   b. If users is a prescriber ensure they are also granted the Prescriber role.

5. **Click Save in the tool bar**.

Supplemental References

System Administration Guide

Unit Permissions

Units need to be permissioned so users have access to them. Without unit permission users would not be able to see the beds and client's associated with the unit.

1. Note: This set up is not required in TRAIN environment.
2. **Click the Proc/Prog/Loc/Proxy/Supervisor tab**.
3. In the Unit section **click Add Unit(s)... button**.

4. In the pop-up window **select the available units** and **click the OK button**.
   a. Multiple units can be selected at once by holding down the Ctrl key on your keyboard.
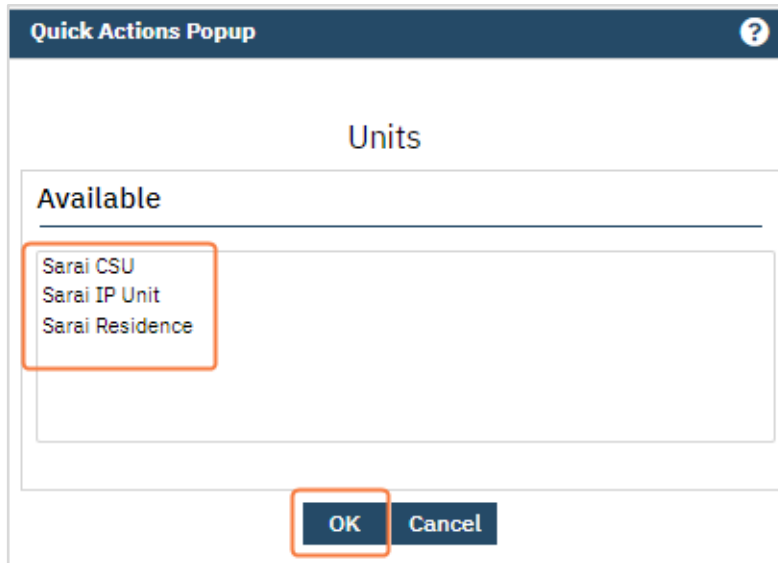
5. Click Save in the tool bar.

Appendix A

Table displays options associated with Order Types in Order Details screen.

* Indicates options associated with Medication Assisted Treatment which is not currently in use.
**Indicates options associated with Activity Order, which is not utilized.

Options	Medication	Nursing	Additional	Dietary	Adaptive Equipment	Consult	Labs	Procedures	Radiology	Safety Check
Order can be completed	X	X	X	X	X	X	X	X	X	
Order can be pended	X	X	X	X	X	X	X	X	X	
Order rationale	X	X	X	X	X	X	X	X	X	
Order Comments	X	X	X	X	X	X	X	X	X	X
Whiteboard Observations	X	X	X	X	X	X				X
Diagnosis Required				X	X	X	X	X	X	X
Dual Sign Required	X			X						
Self Administered	X			X						
Whiteboard Level			X	X						
Whiteboard Legal			X	X						
Billable	X	X	X	X	X	X	X	X	X	X
Consent Required	X									
Add Order to MAR	X	X	X	X			X	X	X	
Prescription Required?	X	X	X	X	X	X	X	X	X	X
Permissioned?	X	X	X	X	X	X	X	X	X	X
Sensitive Order	X	X	X	X	X	X	X	X	X	X
Quick Order										
Draw from Service Center						X	X			
Pain Level Required?	X			X						
Multiple Admins Allowed Within Hou	X			X						
Titration/Taper?	X	X	X							
Medications category	X	X	X	X	X	X	X	X	X	X
Display Program		X	X	X	X	X	X	X	X	
Clinic/Location (default)						X	X			
Medication Assisted Treatment (MAT)?*	X			X						
Medication Assisted Treatment						X				
Machine Connection Required?*	X			X						
Take Home Allowed?*	X			X						
Threshold Activity?**				X						
Activity Timespan?**				X						

Decision tree below is meant to assist you with setting up your orders and how the orders notify users. Please remember this is based on general needs and cannot consider every use case.

Note: Tracking Protocol can be set up for non-order reminders that are associated with the client.