Whiteboard User Guide

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Whiteboard

Whiteboard

A Whiteboard in a medical setting is a way to communicate to clients and staff in a residential or inpatient environments. The whiteboard communicates key details about the client's stay. The SmartCare *Whiteboard* is designed for this same purpose and can be displayed on a television monitor mounted on the wall.

Complete these tasks to set up the *Whiteboard*:

Set Up Whiteboard (See page 1)

Display the Whiteboard Page (See page 2)

Set Up Whiteboard

There are two setups needed for *Whiteboard* to display information on the *Whiteboard*. To set up:

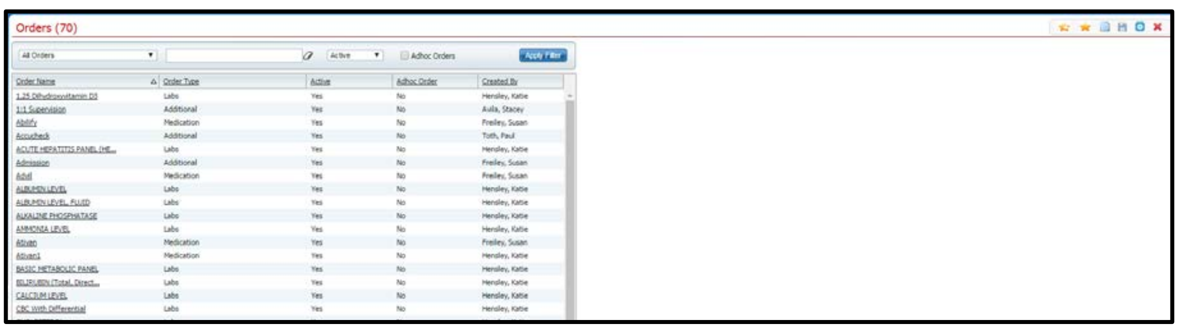
Orders (See page 1)

Precautions (See page 2)

Set up Orders

1. Follow this path: **Administration tab > Medical Setup banner > Orders sub-banner.**

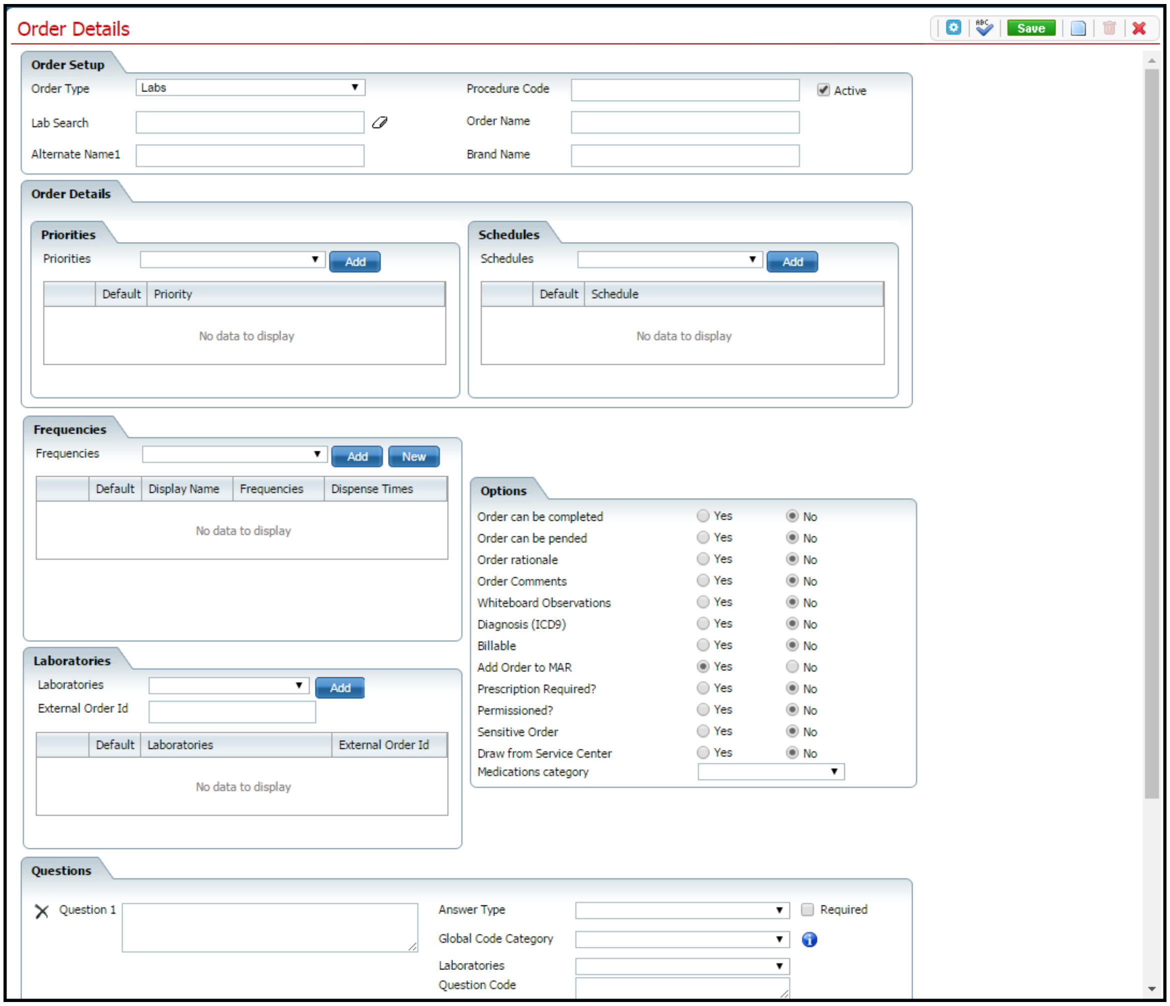
   The *Orders* list page is displayed. View field definitions (See page 47).

2. Find the **order** you want to add to the *Whiteboard*.

3. Click the **hyperlinked order name** in *Order Name* column.

   The *Order Details* page is displayed. View field definitions (See page 28).



4. In the *Options Section*, make sure **Whiteboard Observations** option is set to *Yes*. By setting this option to *Yes*, observations included in an *Order* are displayed on the *Whiteboard* in the *Observations* column.

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

6. Click the **Exit**  icon in the tool bar.

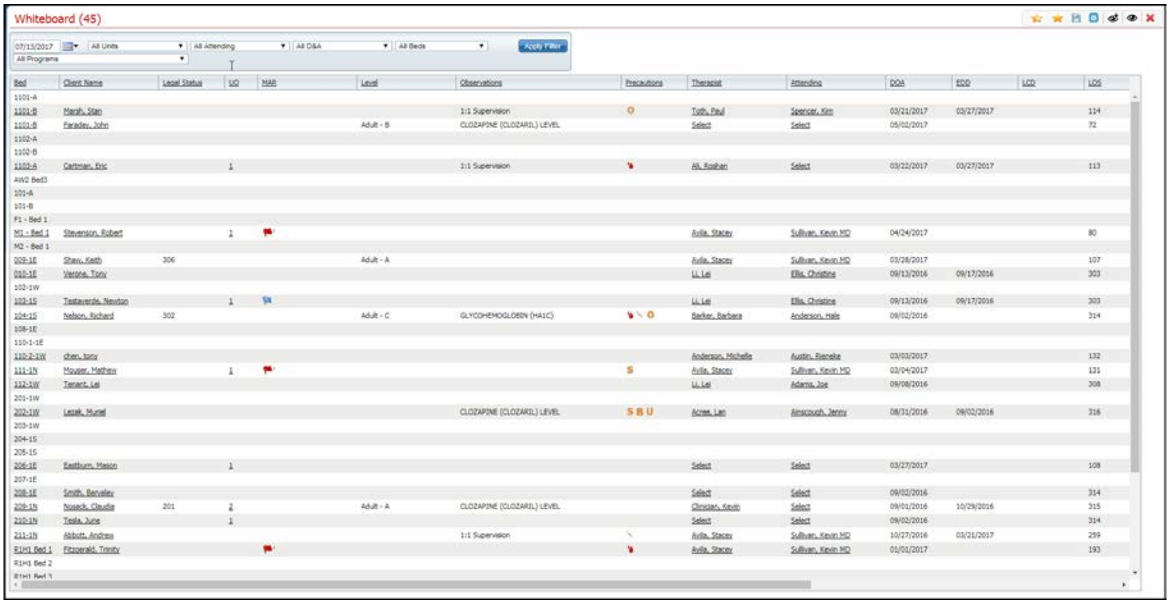
Set up Precaution Codes

The codes that appear on the Precaution window must be set up before using the Whiteboard. You set up precaution codes in Global Codes. There are 7 precaution codes that come standard with SmartCare. However, you can change and delete those codes, as well as, set up your own precaution codes.

Display the Whiteboard Page

1. Follow this path: **My Office tab > Inpatient/Residential banner > Whiteboard sub-banner**.

   The *Whiteboard* page is displayed. View field definitions (See page 52).



Why can't I access these screens? (See page **61**)

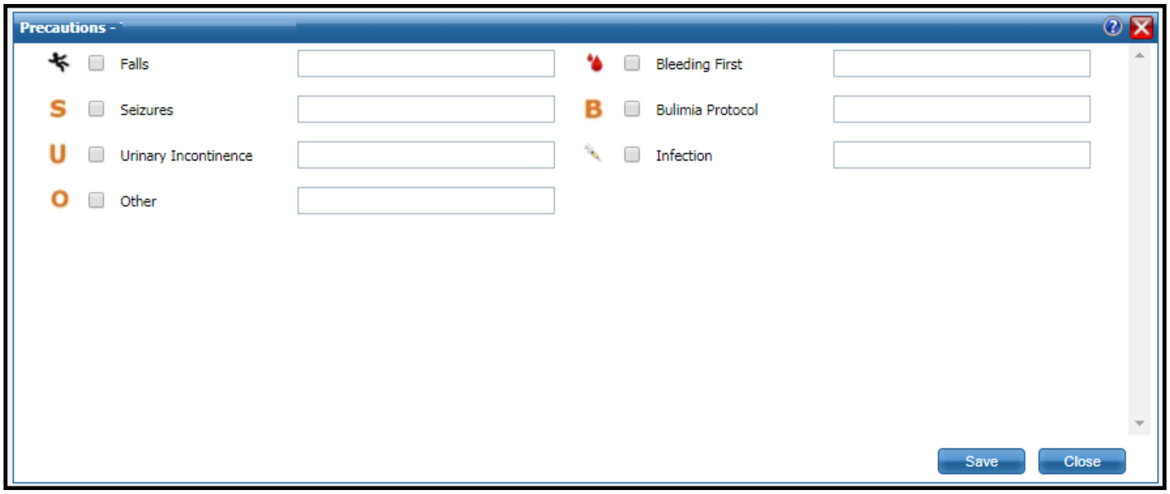
Set a Precaution for a Client

In the *Precautions* column on the *Whiteboard*, you can insert an icon that identifies a reason(s) to watch a client.

1. With the *Whiteboard* page displayed, find the **client** you want to add a precaution to.

2. Click the **cursor** in the space in the *Precautions* column on the client's record line.

   The *Precautions* pop-up window is displayed. View field definitions (See page 51).



3. Click the **check box** for the *Precaution* for the client.

4. Type a **description of the precaution** in the blank field. You can enter up to 350 characters.

5. When you are finished, click the **Save & Close** button.

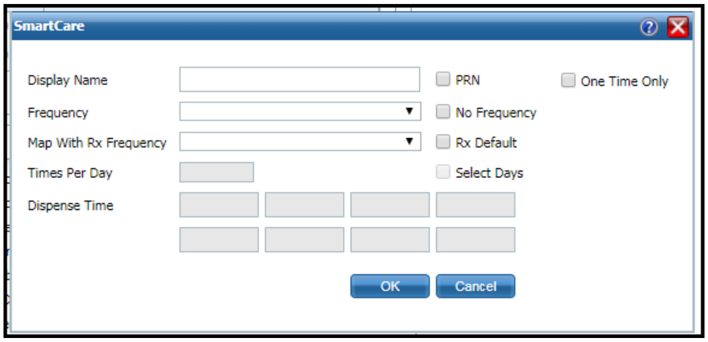
   The window is closed. The icon appears in the field in the *Precautions* field for the client.

Set Up a New Frequency

1. Make sure the *Order Details - Additional* page is displayed.

2. In the *Frequencies* section, click the **New** button.

   The *Frequencies* window is displayed. View field definitions.



3. Complete the **Frequencies** window.

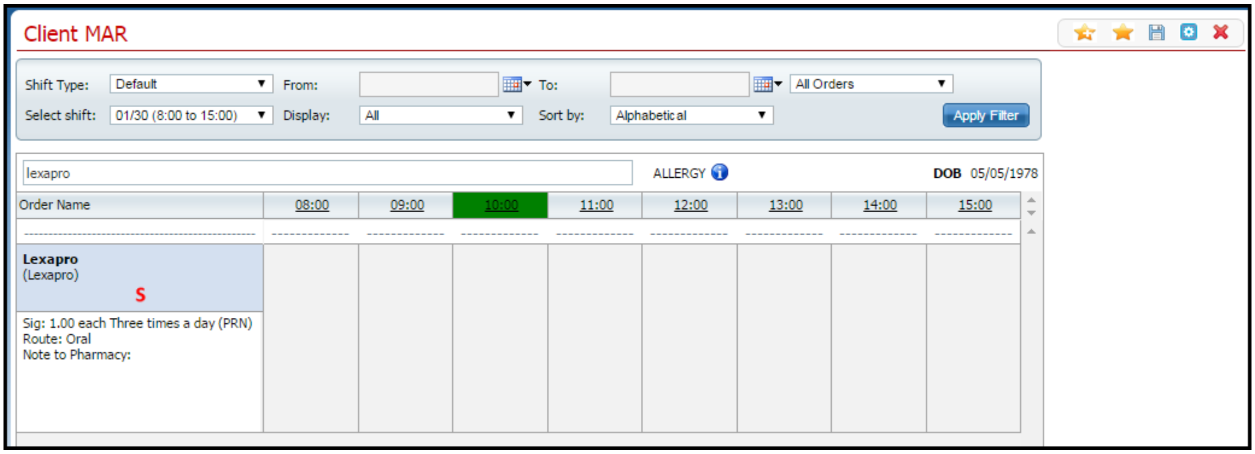
4. Click the **OK** button.

   The window is closed.

5. Continue setting up the ***Additional Order***.

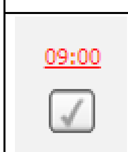
Field Definitions

Client MAR Page Field Definitions

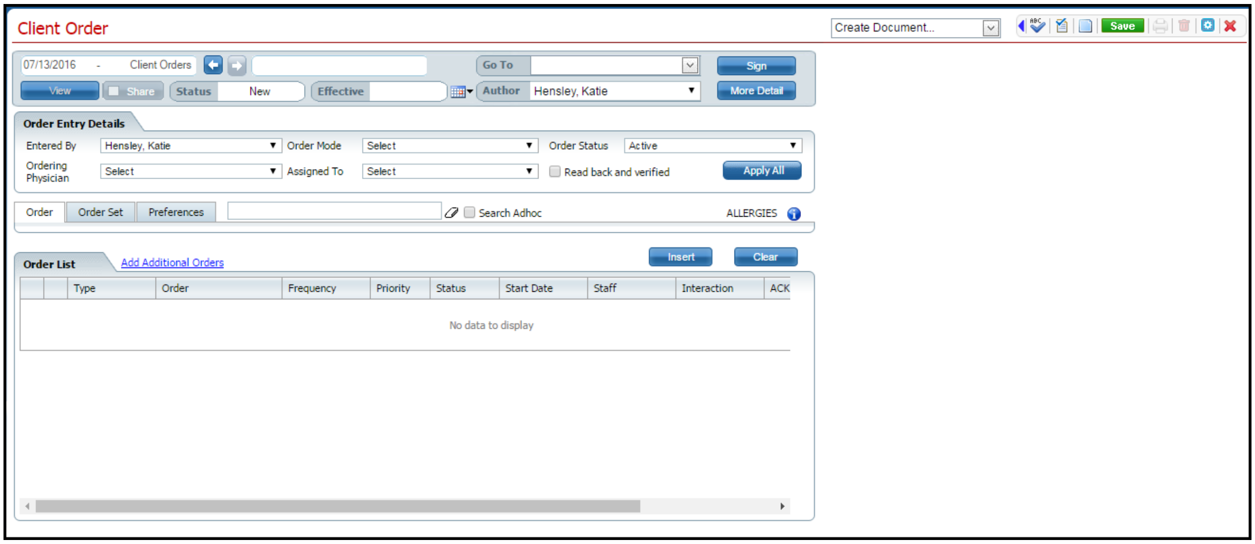


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
Shift Type	Select from the drop-down list to filter records to display in the List area of the page. Options are: • Default • Custom - If you select Custom, the *From* and *To* date fields are activated.
From	Select the *Custom* option in the *Shift Type* field to activate the *From* field. Select the beginning date of medication records you want to view.
To	Select the *Custom* option in the *Shift Type* field to activate the *To* field. Select the beginning date of medication records you want to view.
All Orders	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Orders • Medication Orders Only • Non Medication Orders Only
Select Shift	Select from the drop-down list to filter records to display in the List area of the page. Options are: • <date> (0:00 to 7:00) • <date> (8:00 to 15:00) • <date> (16:00 to 23:00) Two 24-hour dates are listed.

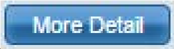
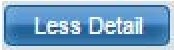
Field	Description
Display	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All • One Time Only • PRN • Scheduled
Sort by	Select from the drop-down list to filter records to display in the List area of the page. Options are: • Alphabetical • Due Time • Order Date • Reverse Order Date • Route
List	
<field>	Use this area for notes that are needed. You can enter up to 200 characters in this field.
Overdue	The hyperlinked word identifies that the medication was not given on time. Click the **hyperlinked word** to display the order and instructions to dispense.
Allergy	Hover the mouse over the icon to display any allergies the client has.
DOB	Identifies the client's date of birth.
8:00m 09:00, 10:00, 11:00, 12:00, 13:00, 14:00, 15:00	Each column identifies the hours of the shift and displays when a medication is dispensed in the hour. Enough columns are displayed for each hour of the Medication shift. The green bar identifies the current time.
Order name	Identifies the medications prescribed for the client. Only the medications due during the time period are listed.
Blue rectangle	Identifies the name of the medication or order.
	Identifies the instructions for dispensing the order. Hover the cursor over the S to display the information. This is the information you entered in the *Instruction Text* field on the *New Medication Order* page.
white area below the blue rectangle	The following information is listed in this area: • Sig: identifies the instructions for administering the medication or orders. • Route: identifies how the medication is taken. • Note to Pharmacy: identifies any information for the pharmacy.
	Located in the hour when the medication or order is to be administered. Identifies the medication was administered or the order was carried out..
	Indicates that the medication or order was completed. Displays in the hour when the medication or order is to be administered.

Client Order Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

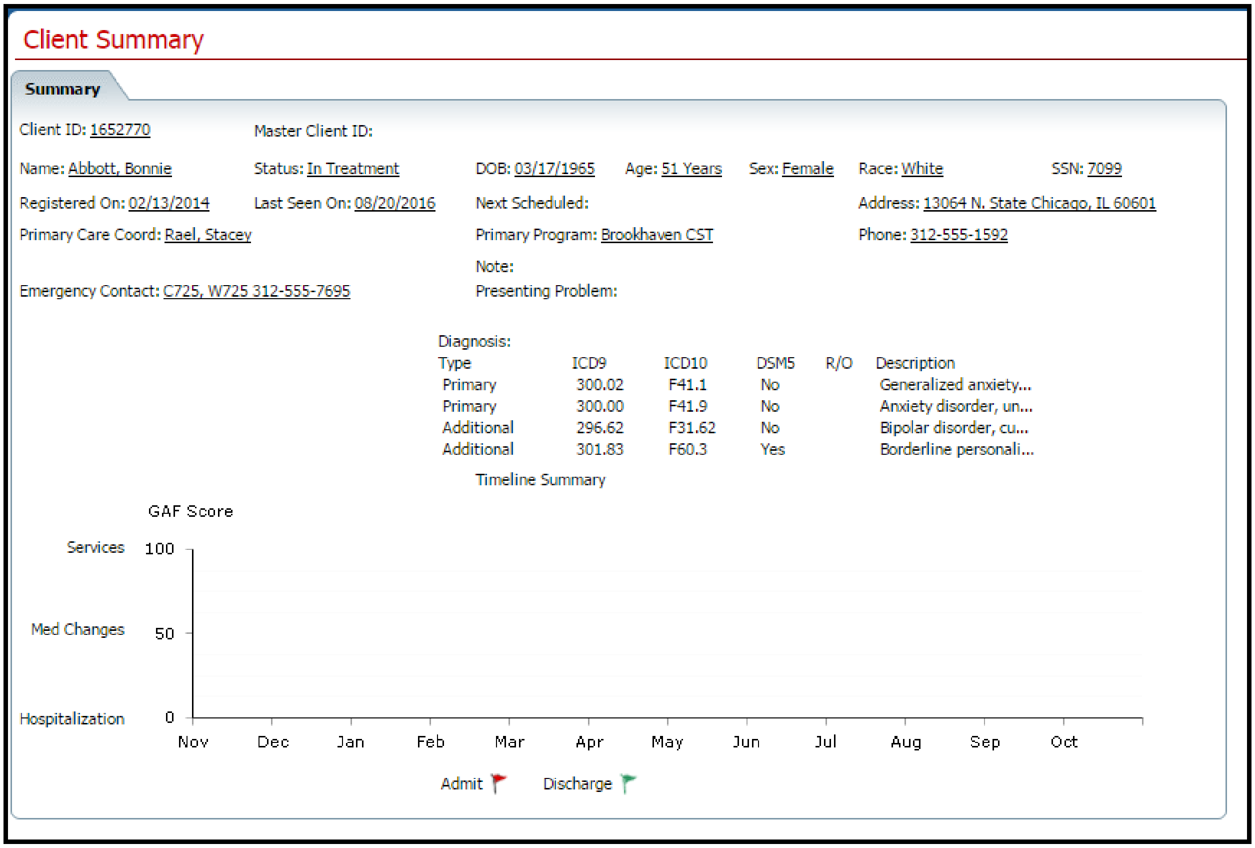
Field	Description
Document Fields	
Previous orders	Text in this field identifies the most recent, previous orders for this client.
Left Arrow 	Click the **left arrow** to advance through the previous client orders.
Right Arrow 	Click the **right arrow** to advance to the next client orders.
Go To	Click the **drop down arrow** to display the list of tasks that you can display for this client. Options are: • Care Plan • General Documents • Service Notes
View button 	When a document is listed in the *Previous orders* fields, click the **View** button to display the client order.
Share	When the client order is created, click the ***Share*** check box to share the order with the listed staff.
Status	Identifies the status of the client order that is displayed. Statuses are: • Active • Complete • Results Obatined • Reviewed • Sent to lab
Effective	Identifies the effective date for the client order. Use the calendar icon to enter a date for the client order.
Author	Identifies the name of the user signed into SmartCare who has accessed the *Client Order* page. If you are completing the order for the physician, click the **drop down arrow** to select the physician's name who will sign the order.

Field	Description
More Detail button 	Click the **More Detail** button to display additional fields. Refer to the *More Details section* for a definition of each field.
Less Detail button 	If you have clicked the *More Detail* button, click the **Less Detail** button to hide the displayed fields.
More Details section	
Other Versions	Lists other versions of the client order document.
Signed By	Identifies who has signed the client order.
Signer	The fields in this sub-section allow you to add signers to the client order.
Add Signer(s)	Click the **down arrow** to display and select staff member(s) who need to sign the form.
Sign button	The staff member designated to sign the form signs by clicking the **Sign** button.
Decline button	A staff designated to sign the form can decline by clicking the **Decline** button.
List area	The list area displays each staff member who is designated to sign the form and their response.
Order Entry Details	
Entered By	Identifies which staff member entered the client order.
Order Mode	Identifies what method was used to place the order. Options are: • Verbal • Phone order • External
Order Status	Identifies the status of the order. Options are: • Complete • Results Obtained • Reviewed • Sent to Lab
Ordering Physician	Identifies the physician who prescribed the client order. Select the **physician** from the drop down list. The staff drop down list is created by giving permission to the staff in User/Role Setup on the *Administration* tab.
Assigned To	Identifies which staff member the order action is assigned to. Choose from the drop down list of all staff set up in the system.
Read back and verified	If the order mode is verbal or phone order, select the check box to identify that the order was read back and verified to the physician for its accuracy.
Tab Area	
Order	Click the **Order** tab to enter a new order.
Order Set	Click the **Order Set** tab to display the fields for setting up an *Order Set*. An *Order Set* is a group of orders that is typically administered at a specific time. For example, there is an *Order Set* to use when admitting a client to the facility.
Preferences	Click on the **Preferences** tab to view the *Preferences* of the prescribing physician for this type of order. For example, the prescribing physician may prefer the generic of Lexapro rather than the brand name medication.
<blank field>	This field is only displayed when the *Order* or *Order Set* sections are selected. 1. Type **all or part** of the order name in the field. As you type, matches are listed in a drop down list. 2. Select the item that describes the order you want to create. 3. Press **Enter**. The fields for the type of order are then displayed in the space between the tabs and the *Order List* section.
Eraser icon	This icon is only displayed when the *Order* or *Order Set* sections are selected. Click the **eraser icon** to clear any text in the previous text field.

Field	Description
Search Adhoc	This check box is only displayed when the *Order* section is selected and you are entering a *Medication* order. 1. If no options are displayed when you enter text in the blank field, select the **Adhoc** check box to enter a medication that is not currently entered in SmartCare. 2. Selecting the **check box** displays the *Create Adhoc Order* button. 3. Click the **button** to create an adhoc order. Tell me how... A report can be run later to display all Adhoc orders that have been created so the medications can be permanently entered into SmartCare. qa
Allergies Information icon	Hover your cursor over the icon to view a list of the client's allergies.
Order fields - the fields that are displayed depend on the type of order you are creating.	
Adaptive Equipment	View field definitions (See page 16).
Additional	View field definitions (See page 20).
Consults	View field definitions (See page 24).
Labs	View field definitions (See page 28).
Medication	View field definitions (See page 32).
Nursing	View field definitions (See page 36).
Procedures	View field definitions (See page 40).
Radiology	View field definitions (See page 44).
Order List	
Delete icon	Click the **delete icon** to order in the list.
Radio button	Select the **radio button icon** to display the information of the order in the *Order Entry Details* section of the page to modify the information. Make **changes** to the information and click the **Modify** button to save the changes.
Type	Identifies the type of order that is listed. Types are: • Adaptive Equipment • Additional • Consults • Labs • Medication • Nursing • Procedures • Radiology
Order	Identifies a description of the order.
Frequency	Identifies the frequency for administering the order.
Priority	Identifies when the order should be administered. Options are: • Routine • STAT • Now • PRN

Field	Description
Status	Identifies the point in the process where the order is in being administered. Options are: • Active • Complete • Discontinued • Results Obtained • Reviewed • Sent To Lab
Start Date	Identifies the date when the order starts being administered.
Staff	Identifies who the order is assigned to.
Interaction	Identifies how the order affects the client or if there are any adverse reactions.,
Ack	Acknowledged. Identifies whether or not the order has been acknowledged.
Read back and verified	Identifies whether or not the verbal or phone order was read back by the staff to the prescribing physician and verified that the order was understood correctly.
Preferences This section is displayed if the Preferences button is selected.	
Preferences	Display the ordering physician's preferences for the order being created.

Client Summary Page Field Definitions

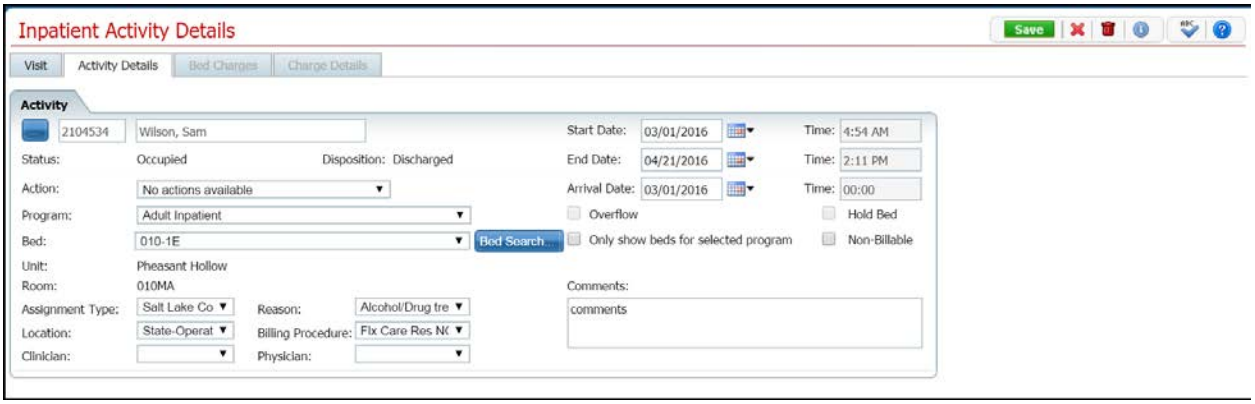


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

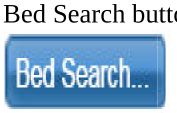
Field	Description
Summary	
Client ID	Identifies the system-assigned number created for the client when first registered.
Master Client ID	Identifies a master client ID if the client has multiple accounts in the system. Multiple accounts may be created for confidentiality purposes.
Name	Identifies the client's last name, first name.
Status	Identifies the client's current status. Statuses are: • Discharged • In Treatment • Phase 1 • Phase 2 • Phase 3 • Registered Statuses may vary by organization.
DOB	Identifies the client's date of birth.
Age	Identifies the client's age.
Sex	Identifies the client's sex.
Race	Identifies the client's race.

Field	Description
SSN	Identifies the last four digits of the client's social security number.
Registered On	Identifies the date when the client was registered in the system.
Last Seen On	Identifies the last date the client was seen in the facility.
Next Scheduled	Identifies the next scheduled visit for the client.
Address	Identifies the client's address.
Primary Care Coord	Identifies the client's assigned primary care coordinator.
Primary Program	Identifies the primary program that the client is enrolled in.
Phone	Identifies the client's phone number.
Note	Identifies any note entered for the client.
Emergency Contact	Identifies the client's emergency information and phone number.
Presenting Problem	Identifies the client's presenting problem for this visit.
Diagnosis	Identifies the diagnoses assigned to the client for this visit. The information is arranged in a table.
Type	Notice that the Types set up columns for the diagnosis code information table. Headings are: • ICD9 • ICD10 • DSM5 • R/O (rule out) • Description
Primary	This row identifies the primary diagnosis for the client. Entries may be listed in each column.
Additional	This row identifies any additional diagnoses for the client. Entries may be listed in each column.
Timeline Summary	
GAF Score	Identifies the GAF (Global Assessment of Functioning) score for the client on the graph.
Y-axis	The items on the Y-axis are: • Hospitalization 0 • Med Changes 50 • Services 100
X-axis	The items on the X-axis are the months of the year.
Flags	The red flag identifies an admission; the green flag identifies a discharge.

Inpatient Activity Details Page Activity Details Tab Field Definitions

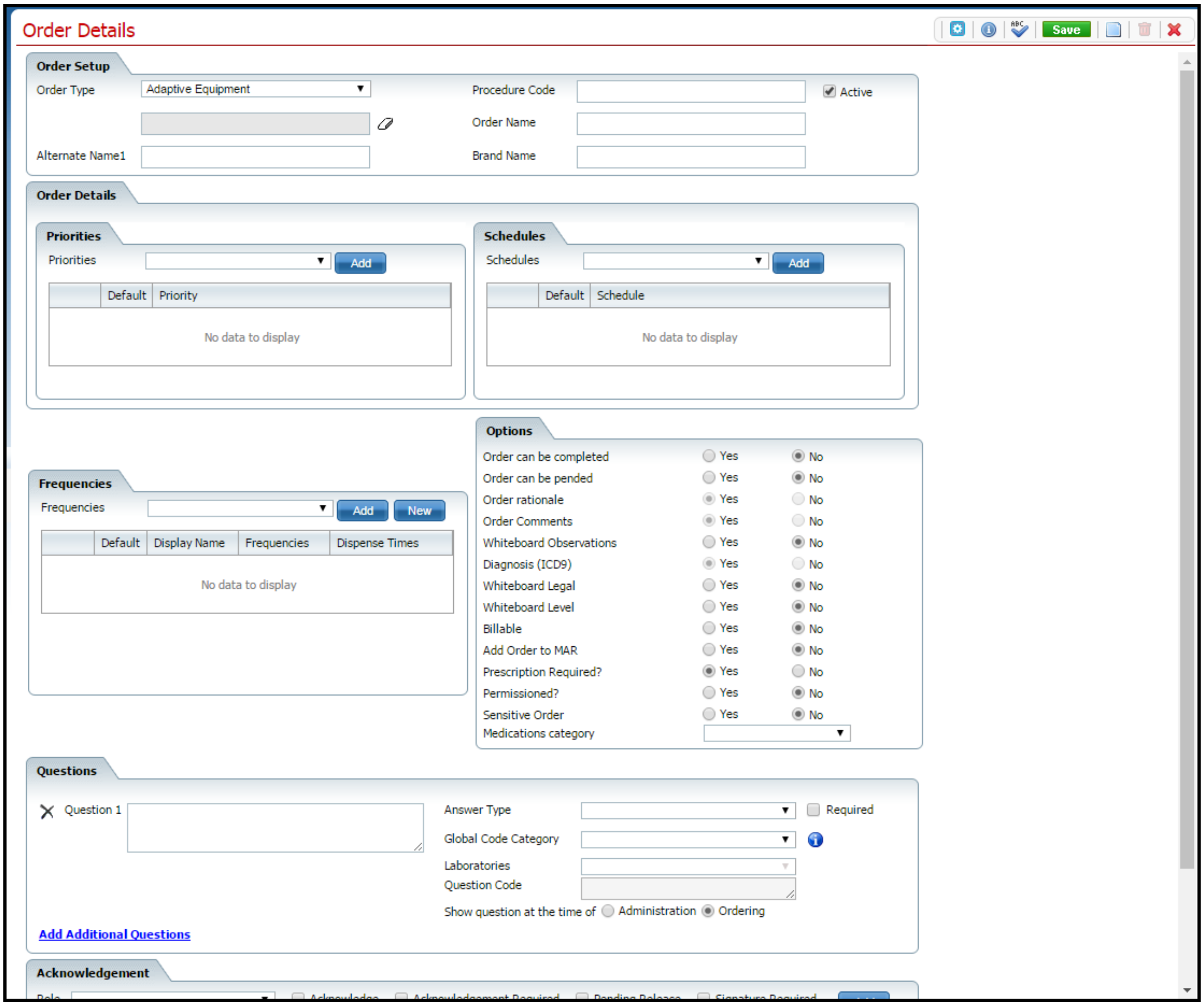


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Activity	
	Click to display the *Client Search* page. Tell me how... (See page 55)
Client ID	Identifies the client's ID number assigned when the client was registered.
Client's Name	Identifies the client's last name, first name.
Start Date Time*	Identifies the date and time of the scheduled admission.
Status	Identifies the current status of the client's visit.
Disposition	If you are applying a new action to the client's status, identifies the previous status.
End Date Time	Identifies the end date and time for the current action.
Action	Identifies the action you are taking on this client's visit. Click the drop down arrow to choose the action.
Arrival Date Time	Identifies the date and time when the client arrived for the action shown in the Status field.
Program	Identifies the program the client is enrolled in.
Overflow	Identifies that this occupied bed is overflow from a different Unit.
Hold Bed	Identifies that you want to hold the selected bed for this action on the client's visit.
Bed	Identifies the bed the client is occupying.
Bed Search button 	Click the Bed Search button to find a different bed for the client. If you want to view only the beds that are valid for the selected program, click the "Only show beds for selected program" option.
Only show beds for selected program	Identifies whether or not you want to only view the beds that are valid for the selected program.
Non-billable	Identifies that the action is non-billable. This means no service will be created and billed for this action.
Unit	Identifies the unit where the bed is located.
Room	Identifies the room where the bed located.
Assignment Type	Identifies the Assignment type for this action.
Reason	Identifies the reason for the action.
Comments	Enter comments about action. You can enter unlimited number of characters.
Location*	Identifies the location of the bed.
Billing Procedure*	Identifies the billing code that identifies this action.

Field	Description
Clinician	Identifies the client's clinician.
Physician	Identifies the client's physician.

Order Details Adaptive Equipment Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

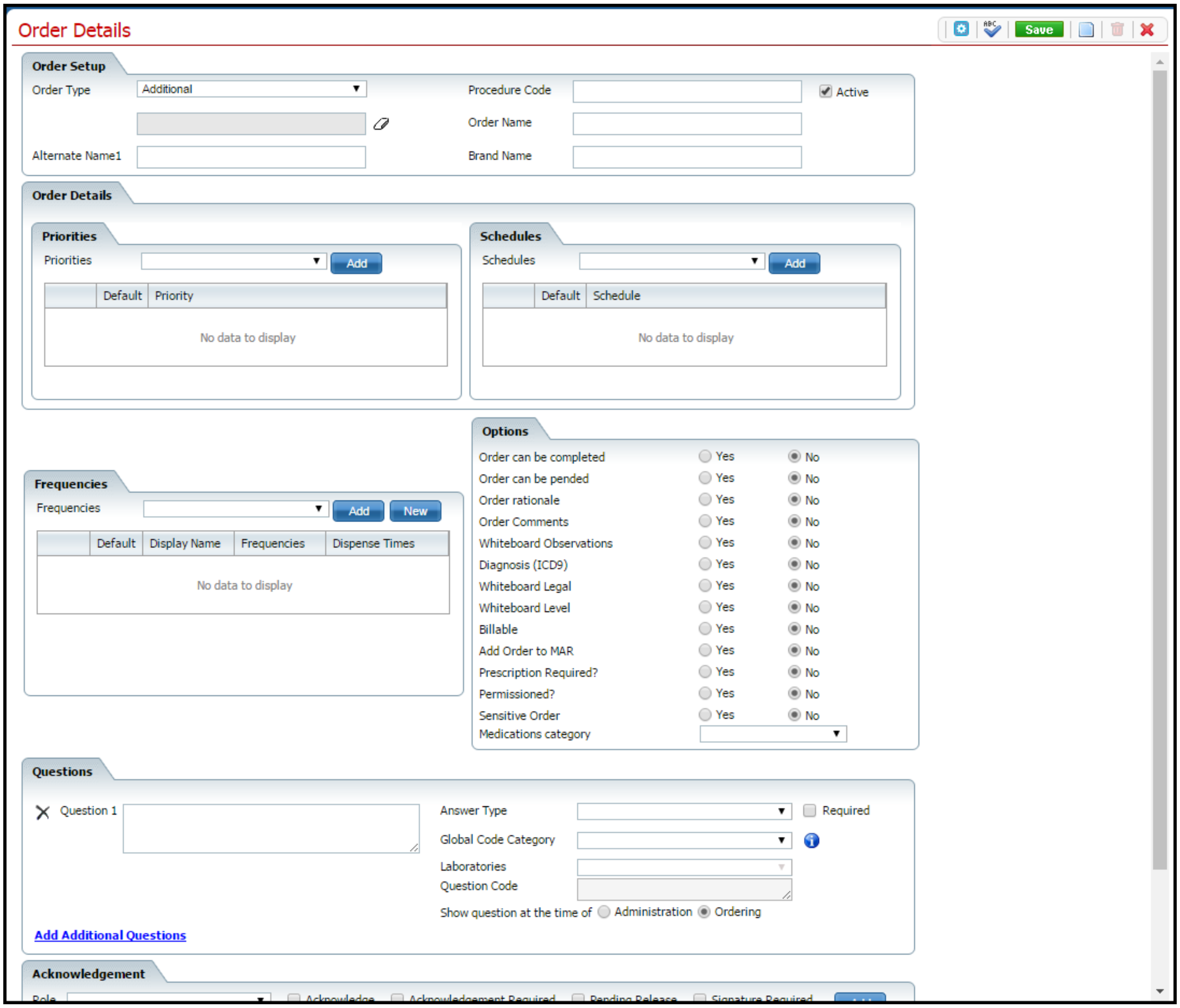
Field	Description
Order Setup	
Order Type*	Select **Adaptive Equipment** from the drop down list. Options are: • Medication • Labs • Radiology • Consults • Nursing • Additional • Procedures • **Adaptive Equipment**
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the order to create a service for the client.

Field	Description
Active	Select the **check box** to make the order type active. Or deselect the check box to inactivate the order type.
<inactive field>	
Order Name*	Type the name of the order for the equipment.
Alternate Name1	Type an alternate name for the for the adaptive equipment order.
Brand Name	Enter a brand name, if needed.
Order Details	
Priorities section	
Priorities	Identifies when the order should be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the radio button next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the order should first be administered and then the ongoing scheduling to administer. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how often the order is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how... (See page 4)
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order be pended or put on hold.
Order rationale	Defaults to Yes. Adds a line on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to Yes. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.
Diagnosis (ICD9)	Defaults to Yes. Places a diagnosis code field on the order.

Field	Description
Whiteboard Legal	Places a legal order on the whiteboard.
Whiteboard Level	Places a level of care on the whiteboard for this order.
Billable	Indicates that the order for adaptive equipment can be billed to the client.
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the adaptive equipment.
Permissioned?	Indicates that specific roles are needed to administer the order.
Sensitive Order	Indicates that the order will generate its own order if it is submitted with other non-sensitive orders.
Medications category	Select a **medications category** to place the hazardous categories icon on the MAR.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question that needs to be asked when the order is placed. For example, the client's height is needed to place the order.
Answer Type	Identifies how the answer will be responded to by the person administering the medication. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the **check box** to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	If sending a laboratory order to an outside lab, provides a list of outside labs. This must be set up on the back end of the system with help from Streamline.
Question Code	Identifies whether or not the lab is providing a question to answer when submitting a lab order.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to set up another question.
Acknowledgement	
Role	Select the **role of staff** who can acknowledge an adaptive equipment order.
Acknowledge	Select the **check box** to present the requirement to acknowledge an order.
Acknowledgement Required	Select the **check box** to indicate that the acknowledgement is required for this role. cna have stops in process
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	

Field	**Description**
<delete icon> 	Click the **delete icon** to delete the acknowledgement role on the same line.
Role	Identifies the role which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge an adaptive equipment order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a medication order.
Pending Release	Identifies whether or not the role has the ability to release a pended order.
Signature Required	Identifies whether or not a signature is required to acknowledge this medication.

Order Details Additional Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

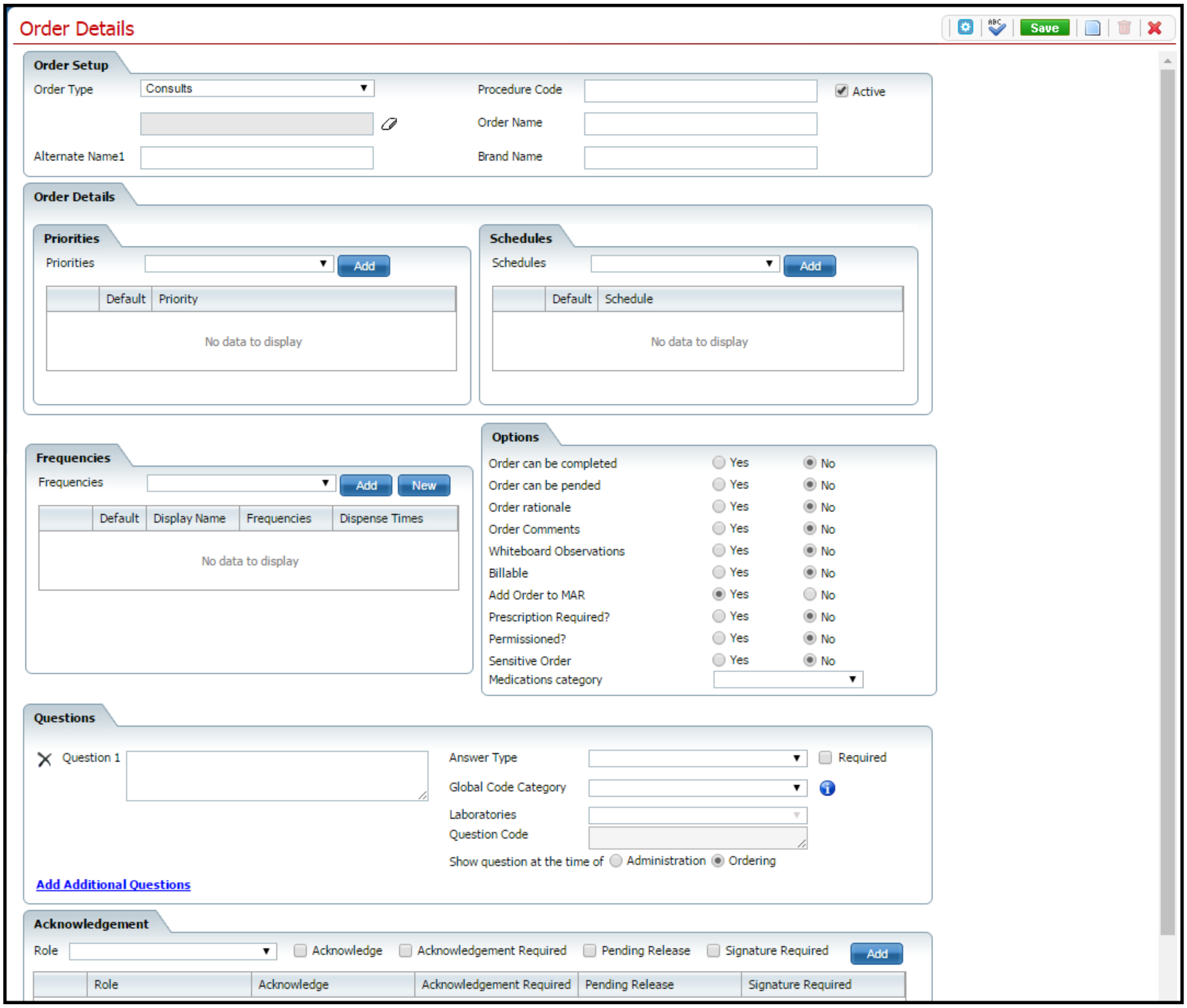
Field	**Description**
Order Setup	
Order Type*	Select **Additional** from the drop down list. Options are: • Medication • Labs • Radiology • Consults • Nursing • **Additional** • Procedures • Adaptive Equipment
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the administration of this order to create a service for the client.

Field	Description
Active	Select the check box to make the order type active. Or deselect the check box to inactivate the order type.
<inactive field>	
Order Name*	Type the name of the order. You can enter up to 300 characters.
Alternate Name1	Type an alternate name for the additional order.
Brand Name	Enter a brand name, if needed.
Order Details	
Priorities section	
Priorities	Identifies when the medication can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the radio button next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the order should be administered. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the radio button next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how often the medication is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the Frequency you need is not listed, click the **New** button to add a description. Tell me how... (See page 4)
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order be pended or put on hold.
Order rationale	Defaults to Yes. Adds a line on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to Yes. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.
Diagnosis (ICD9)	Defaults to Yes. Places a diagnosis code field on the order.
Whiteboard Legal	Places a legal order on the whiteboard.

Field	Description
Whiteboard Level	Places a level of care on the whiteboard for this order.
Billable	Indicates that an additional order can be billed to the client.
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the additional order.
Permissioned?	Indicates that specific roles with permission are needed to administer the order.
Sensitive Order	Indicates that the order will generate its own order if it is submitted with other non-sensitive orders.
Medications category	Select a **medications category** to place the hazardous categories icon on the MAR.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person administering the medication. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the **check box** to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	If sending a laboratory order to an outside lab, provides a list of outside labs. This must be set up on the back end of the system with help from Streamline.
Question Code	Identifies whether or not the lab is providing a question to answer when submitting a lab order.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role of staff** who can acknowledge a medication order.
Acknowledge	Select the **check box** to present the ability to acknowledge
Acknowledgement Required	Select the **check box** to indicate that the acknowledge is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon>	Click the **delete icon** to delete the acknowledgement role on the same line.
Role	Identifies the role which has an acknowledgement defined for it.

Field	Description
Acknowledge	Identifies whether or not the role must acknowledge a medication order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a medication order.
Pending Release	Identifies whether or not the role has the ability to release a pended order.
Signature Required	Identifies whether or not a signature is required to acknowledge this order.

Order Details Consults Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

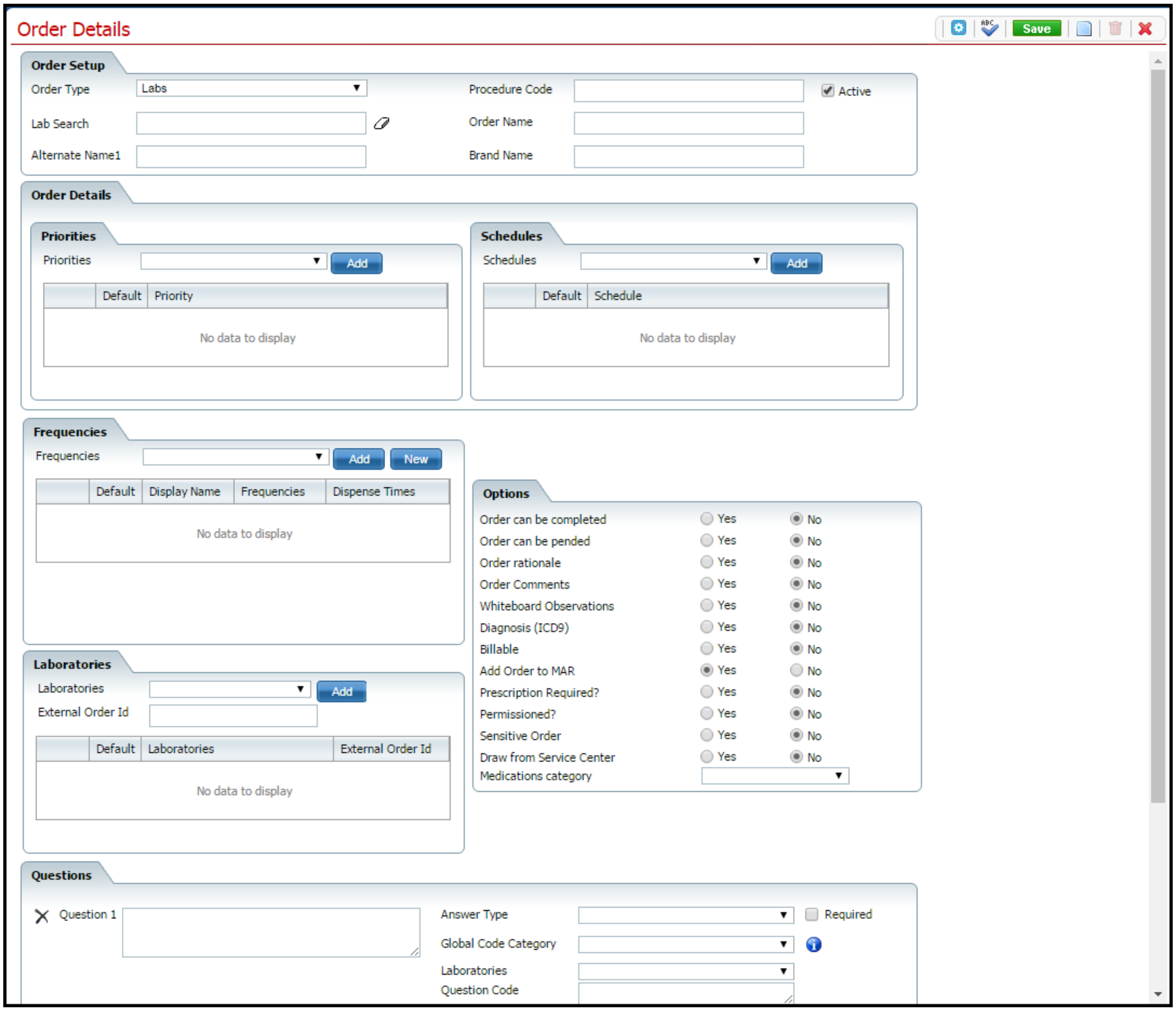
Field	Description
Order Setup	
Order Type*	Select **Consults** from the drop down list. Options are: • Medication • Labs • Radiology • **Consults** • Nursing • Additional • Procedures • Adaptive Equipment
Procedure Code	Enter a **procedure code** description. A procedure code in this field causes the administration of this order to create a service for the client.

Field	Description
Active	Select the **check box** to make the order type active. Or deselect the check box to inactivate the order type.
<deactivated field>	
Order Name*	Type the name of the order for the consult.
Alternate Name1	Type an alternate name for the consult.
Brand Name	Enter a brand name, if needed.
Order Details	
Priorities section	
Priorities	Identifies when the medication can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the **radio button** next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the consultation should first be administered and then the ongoing scheduling to administer. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how consultation is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how...
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order be pended or put on hold.
Order rationale	Defaults to Yes. Adds a line on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to Yes. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.
Billable	Indicates that the order for adaptive equipment can be billed to the client.

Field	Description
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the adaptive equipment.
Permissioned?	Indicates that specific roles are needed to administer the order.
Sensitive Order	Indicates that the order will generate it's own order if it is submitted with other non-sensitive orders.
Medications category	Select a medications category to place the hazardous categories icon on the MAR.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person administering the medication. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the check box to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	If sending a laboratory order to an outside lab, provides a list of outside labs. This must be set up on the back end of the system with help from Streamline.
Question Code	Identifies whether or not the lab is providing a question to answer when submitting a lab order.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the consultation is being administered. • Ordering - present the question when the consultation is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role of staff** who can acknowledge a medication order.
Acknowledge	Select the **check box** to present the ability to acknowledge
Acknowledgement Required	Select the **check box** to indicate that the acknowledge is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon>	Click the **delete icon** to delete the acknowledgement role on the same line.
Role	Identifies the **role** which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge a consultation order.

Field	Description
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a consultation order.
Pending Release	Identifies whether or not the role has the ability to release a pended order.
Signature Required	Identifies whether or not a signature is required to acknowledge this order.

Order Details Labs Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

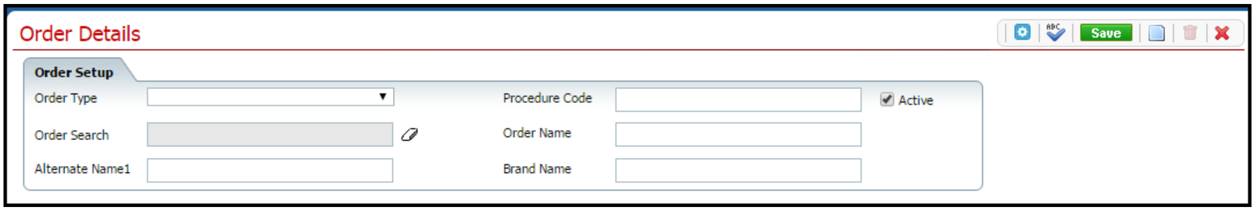
Field	**Description**
Order Setup	
Order Type*	Select **Labs** from the drop down list. Options are: • Medication • **Labs** • Radiology • Consults • Nursing • Additional • Procedures • Adaptive Equipment
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the administration of this lab work to create a service for the client.

Field	Description
Active	Select the **check box** to make the order type active. Or deselect the check box to inactivate the order type.
Lab Search	Type the lab name where the results will be displayed in a Flowsheet set up for the lab.
Order Name*	Type the name of the order for the lab work.
Alternate Name1	Type an alternate name for the lab.
Brand Name	If the order is for a generic lab work, enter the brand name.
Order Details	
Priorities section	
Priorities	Identifies when the lab order can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the **radio button** next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the lab order should first be administered and then the ongoing scheduling to administer. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how often the lab order is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how...
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order can be pended or put on hold.
Order rationale	Defaults to *Yes*. Adds a **line** on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to *Yes*. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.
Diagnosis (ICD9)	Defaults to Yes. Places a diagnosis code field on the order.
Billable	Indicates that the order for adaptive equipment can be billed to the client.

Field	Description
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the lab order.
Permissioned?	Indicates that specific permissioned roles are needed to administer the order.
Sensitive Order	Indicates that the order will generate it's own order if it is submitted with other non-sensitive orders.
Draw from Service Center	Indicates that a lab order needing a draw must be performed at the service center.
Medications category	Select a medications category to place the hazardous categories icon on the MAR.
Laboratories	
Laboratories	Select the name of a laboratory to send orders to.
External Order Id	Type the Order ID to use with an external order. You can enter up to 230 characters.
<delete icon>	Click the **delete icon** to delete a laboratory saved to the list.
Default	Select the **radio button** next to the laboratory you want to display on the order page as the default laboratory.
Laboratories	Identifies the name of labs where orders can be sent.
External Order Id	Identifies the order ID provided for this lab.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person administering the lab. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the **check box** to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	If sending a laboratory order to an outside lab, provides a list of outside labs. This must be set up on the back end of the system with help from Streamline.
Question Code	Identifies whether or not the lab is providing a question to answer when submitting a lab order.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role of staff** who can acknowledge a lab order.
Acknowledge	Select the **check box** to present the ability to acknowledge

Field	Description
Acknowledgement Required	Select the **check box** to indicate that the acknowledgement is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon> 	Click the **delete icon** to delete a question and its fields.
Role	Identifies the role which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge a medication order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a medication order.
Pending Release	Identifies whether or not the role has the ability to release a pended order.
Signature Required	Identifies whether or not a signature is required to acknowledge this medication.

Order Details Medication Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

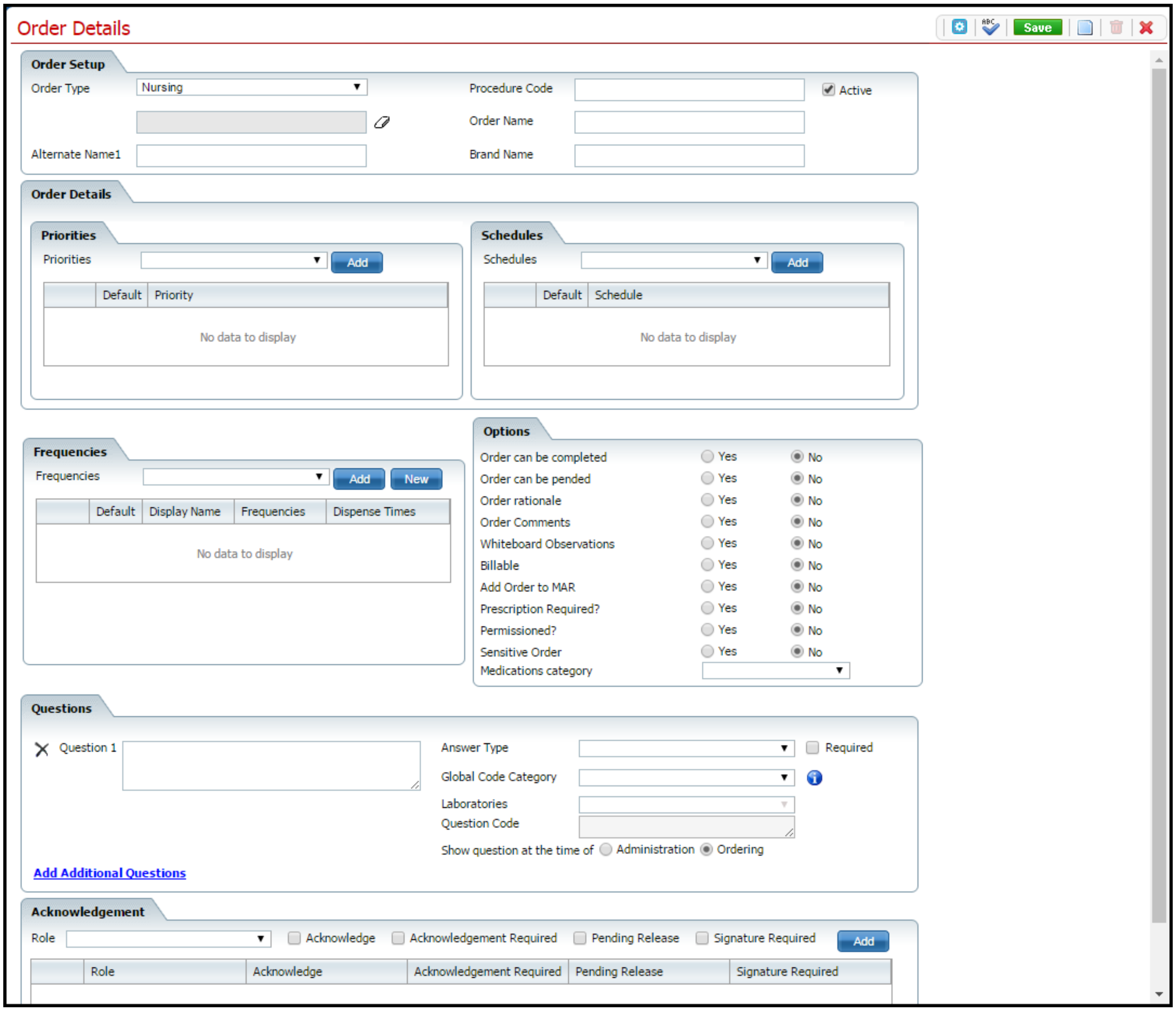
Field	Description
Order Setup	
Order Type*	Select **Medication** from the drop down list. Options are: • Medication • Labs • Radiology • Consults • Nursing • Additional • Procedures • Adaptive Equipment
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the administration of this medication to create a service for the client.
Active	Select the **check box** to make the order type active. Or deselect the check box to inactivate the order type.
Medication Search	Type characters that will be used when the user is searching for the medication when entering an order.
Order Name*	Type the name of the order for the medication.
Alternate Name1	Type an alternate name for the medication.
Brand Name	If the order is for a generic medication, enter the brand name of the medication.
Administration Time Window	Identifies the time frame in which the medication can be administered from the time in the order.
Stock Medication	Identifies to dispense the medication from the stock supply stored at the unit.
Medication Details	
Strengths section	
Strengths	Identifies the dosage strengths available for this medication.
Units	Identifies the number of doses that are administered.
Preferred NDC	National Drug Code. Three-segment number used to identify the medication.
Routes section	
Routes	Route refers to the methods in which the medication is administered. Examples are: • Sublingual • Rectal • Topical • Parenteral The correct routes are filled in by the medication.
Order Details	
Priorities section	

Field	Description
Priorities	Identifies when the medication can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the **radio button** next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the medication should first be administered and then the ongoing scheduling to administer. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how often the medication is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how...
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order can be pended or put on hold.
Order rationale	Defaults to Yes. Adds a line on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to Yes. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.
Dual Sign Required	Controlled substances; and someone signs on the MAR icon so icon on the MAR
Self Administered	Identifies whether or not the client can administer the medication themselves.
Billable	Indicates that the order for medication can be billed to the client.
Consent Required	Identifies that consent from the client must be received.

Field	Description
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the adaptive equipment.
Permissioned?	Indicates that specific roles are needed to administer the order.
Sensitive Order	Indicates that the order will generate it's own order if it is submitted with other non-sensitive orders.
Medications category	Select a **medications category** to place the hazardous categories icon on the MAR.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person administering the medication. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the **check box** to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	For a medication order, this field is deactivated.
Question Code	For a medication order, this field is deactivated.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role of staff** who can acknowledge a medication order.
Acknowledge	Select the **check box** to present the ability to acknowledge
Acknowledgement Required	Select the **check box** to indicate that the acknowledge is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon>	Click the **delete icon** to delete the acknowledgement role on the same line.

Field	Description
Role	Identifies the role which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge a medication order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a medication order.
Pending Release	Identifies whether or not the role can release an order from a pended status.
Signature Required	Identifies whether or not a signature is required to acknowledge this medication.

Order Details Nursing Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

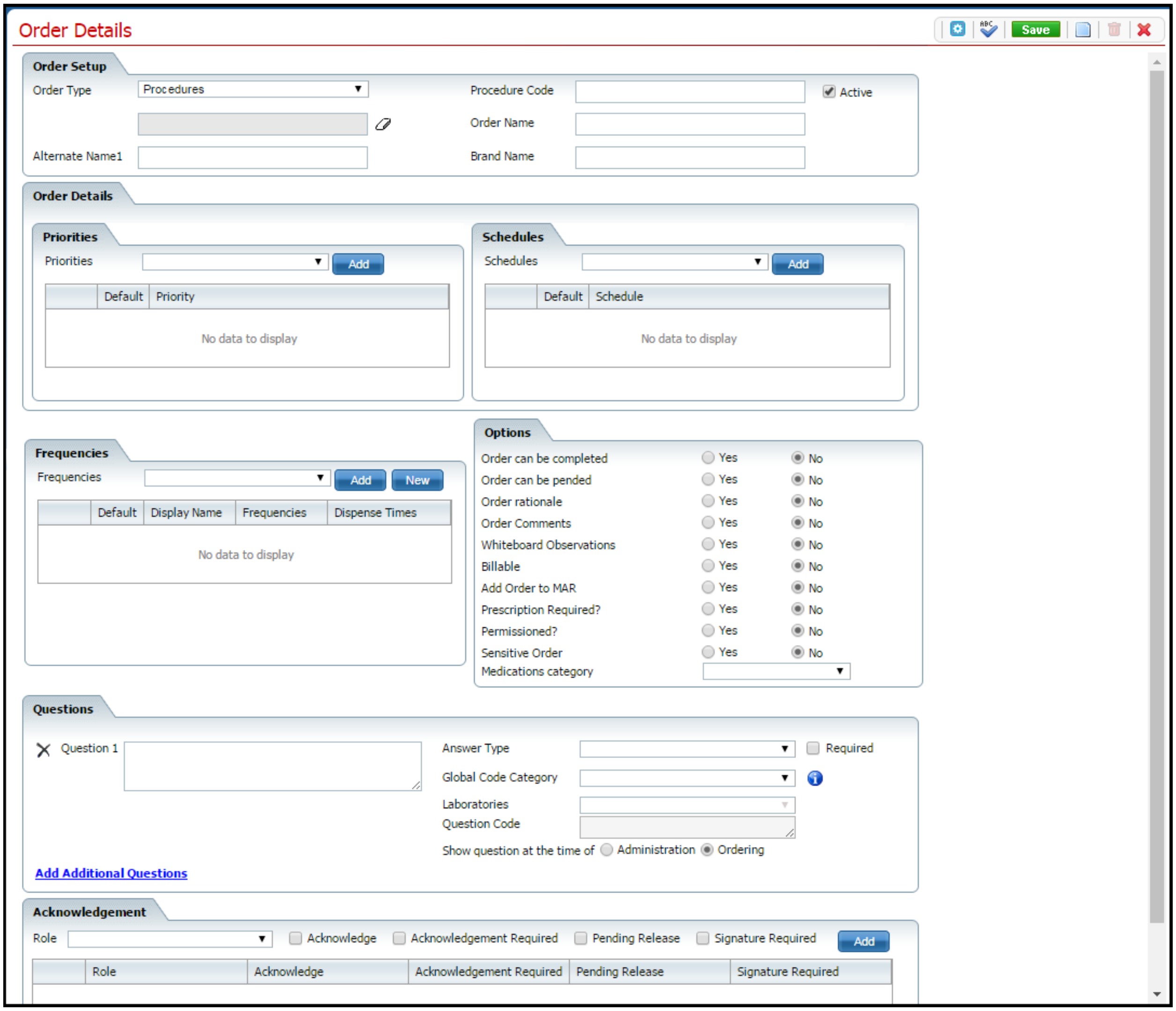
Field	Description
Order Setup	
Order Type*	Select **Nursing** from the drop down list. Options are: • Medication • Labs • Radiology • Consults • **Nursing** • Additional • Procedures • Adaptive Equipment
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the administration of this order to create a service for the client.

Field	Description
Active	Select the check box to make the order type active. Or deselect the check box to inactivate the order type.
<inactive field>	
Order Name*	Type the name of the order.
Alternate Name1	Type an alternate name for the order.
Brand Name	Enter the brand name, if needed.
Order Details	
Priorities section	
Priorities	Identifies when the medication can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the **radio button** next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the order should first be administered and then the ongoing scheduling to administer. Options are: Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how often the order is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how...
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order be pended or put on hold.
Order rationale	Defaults to Yes. Adds a line on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to Yes. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.

Field	Description
Billable	Indicates that the order for nurses can be billed to the client.
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the adaptive equipment.
Permissioned?	Indicates that specific roles are needed to administer the order.
Sensitive Order	Indicates that the order will generate its own order if it is submitted with other non-sensitive orders.
Medications category	Select a medications category to place the hazardous categories icon on the MAR.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person administering the order. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the check box to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	Inactive.
Question Code	Inactive.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role** of staff who can acknowledge a nursing order.
Acknowledge	Select the **check box** to present the ability to acknowledge
Acknowledgement Required	Select the **check box** to indicate that the acknowledgement is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon>	Click the **delete icon** to delete the acknowledgement role on the same line.

Field	Description
Role	Identifies the role which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge a nursing order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a nursing order.
Pending Release	Identifies whether or not the role can release an order from pended status.
Signature Required	Identifies whether or not a signature is required to acknowledge this order.

Order Details Procedures Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

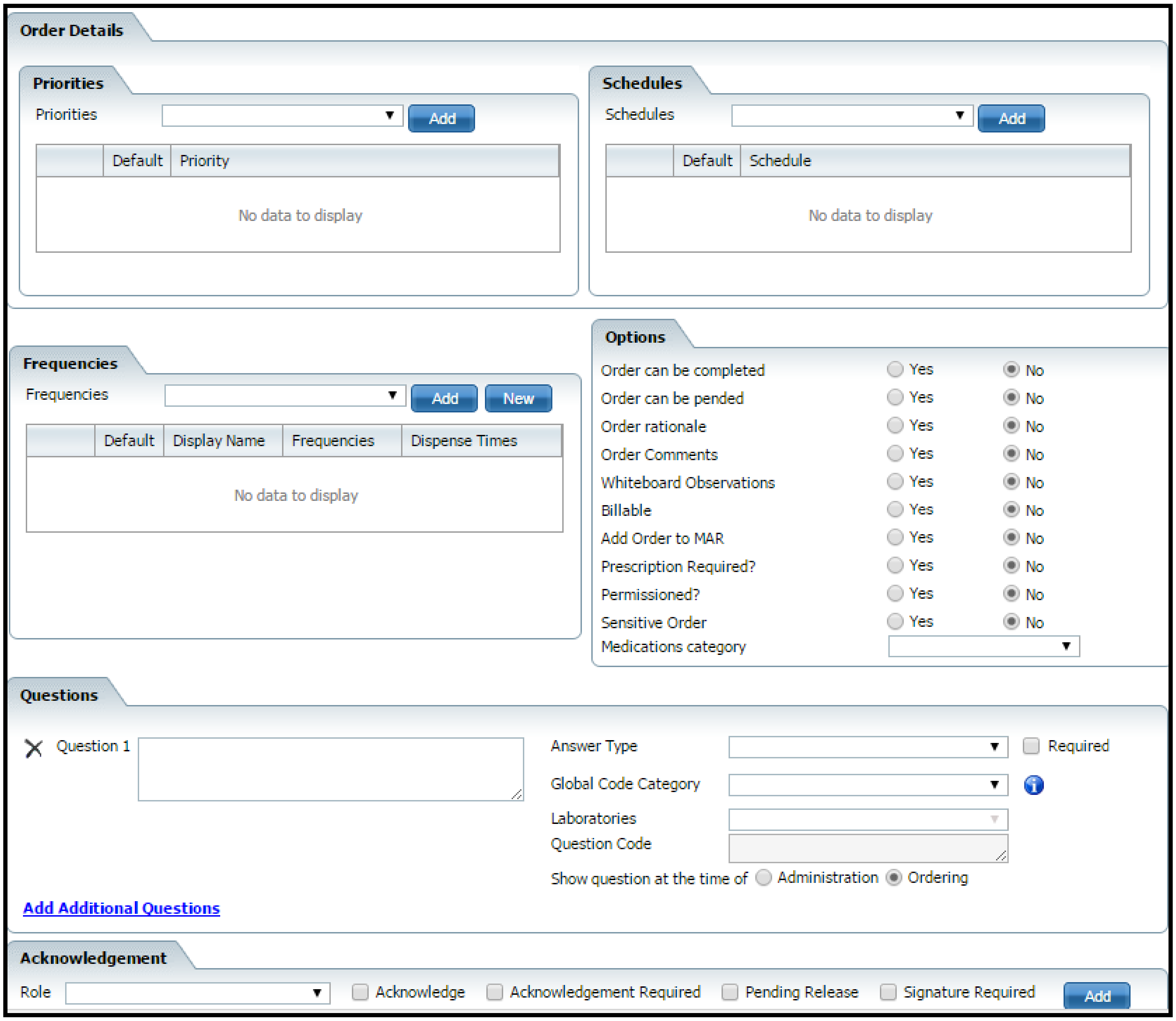
Field	Description
Order Setup	
Order Type*	Select **Procedures** from the drop down list. Options are: • Medication • Labs • Radiology • Consults • Nursing • Additional • **Procedures** • Adaptive Equipment
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the administration of this order to create a service for the client.

Field	Description
Active	Select the **check box** to make the order type active. Or deselect the check box to inactivate the order type.
<deactivated field>	
Order Name*	Type the name of the order for the Procedure.
Alternate Name1	Type an alternate name for the procedure.
Brand Name	Enter the brand name, if needed.
Order Details	
Priorities section	
Priorities	Identifies when the procedure can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the **radio button** next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the procedure should first be administered and then the ongoing scheduling to administer. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select **frequencies** that may be used to identify how often the procedure is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how...
Options	
Order can be completed	Indicates that the order can be placed in a completed status.
Order can be pended	Indicates that the order be pended or put on hold.
Order rationale	Defaults to Yes. Adds a line on the order entry screen that says *Rationale* where the staff creating the orders enters the reason for administering the order.
Order Comments	Defaults to Yes. Indicates to add a comment box on the order.
Whiteboard Observations	Indicates to put the order in the whiteboard observation column.
Billable	Indicates that the order for adaptive equipment can be billed to the client.

Field	Description
Add Order to MAR	Indicates to display this order in the client MAR.
Prescription Required?	Indicates that the physician must provide a prescription for the adaptive equipment.
Permissioned?	Indicates that specific roles are needed to administer the order.
Sensitive Order	Indicates that the order will generate it's own order if it is submitted with other non-sensitive orders.
Medications category	Select a medications category to place the hazardous categories icon on the MAR.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person completing the procedure. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the **check box** to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	Inactive.
Question Code	Inactive.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role** of staff who can acknowledge a procedure.
Acknowledge	Select the **check box** to present the ability to acknowledge the procedure.
Acknowledgement Required	Select the **check box** to indicate that the acknowledgement is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon>	Click the **delete icon** to delete the acknowledgement role on the same line.
Role	Identifies the role which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge a procedure order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a procedure order.
Pending Release	Identifies whether or not the role has the ability to release a pended order.

Field	Description
Signature Required	Identifies whether or not a signature is required to acknowledge this order..

Order Details Radiology Page Field Definitions



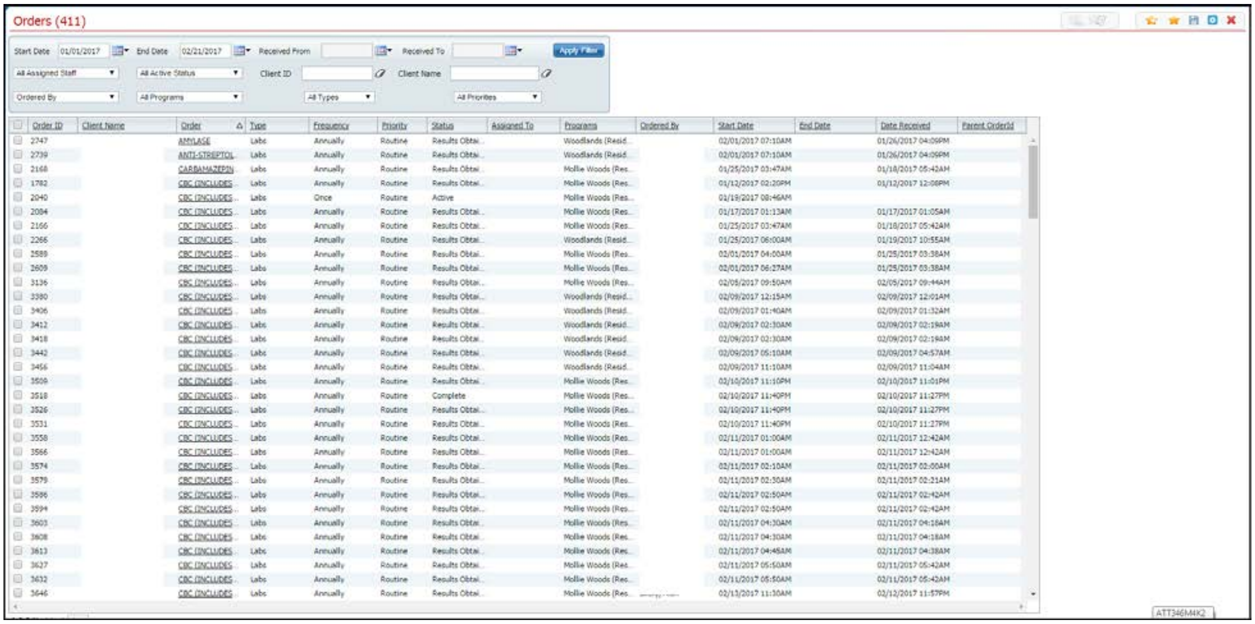
An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Order Setup	
Order Type*	Select **Radiology** from the drop down list. Options are: • Medication • Labs • **Radiology** • Consults • Nursing • Additional • Procedures • Adaptive Equipment
Procedure Code	Enter a **procedure code description**. A procedure code in this field causes the administration of this order to create a service for the client.

Field	Description
Active	Select the **check box** to make the order type active. Or deselect the check box to inactivate the order type.
<deactivated field>	
Order Name*	Type the **name of the order** for the radiology order.
Alternate Name1	Type an **alternate name** for the order.
Brand Name	If the order is for a generic work, enter the brand name.
Order Details	
Priorities section	
Priorities	Identifies when the order can be administered. Options are: • Routine • STAT • Now • PRN
List section	
<delete icon>	Click the **delete icon** to delete the priority from the list.
Default	Select the **radio button** next to the priority that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Priority	Identifies the description of the priority that you added.
Schedules section	
Schedules	Identifies when the order should first be administered and then the ongoing scheduling to administer. Options are: • Standing Administered Once • Today • Tomorrow • After 1PM • Now+Scheduled • Other • When equipment is received
List section	
<delete icon>	Click the **delete icon** to delete the schedule from the list.
Default	Select the **radio button** next to the schedule that should be the default entry on the *Client Order Entry* page, accessed from the **Client tab > Client Orders banner**.
Schedule	Identifies the description of the schedule that you added.
Frequencies	
Frequencies	Select frequencies that may be used to identify how often the order is administered. Select a **frequency** from the drop down list, then click the **Add** button. If the *Frequency* you need is not listed, click the **New** button to add a description. Tell me how...
Options	
Order can be completed	Identifies whether or not the order can be completed in SmartCare.
Order can be pended	Identifies whether or not the order can be pended-put on hold.
Order rationale	Identifies whether or not a rationale or purpose for the order can be entered.
Order Comments	Identifies whether or not comments can be entered for the order.
Whiteboard Observations	Identifies whether or not the order will appear on the whiteboard in the Observation column.
Billable	Identifies whether or not the order creates a billable service.
Add Order to MAR	Identifies whether or not the order should be listed in the MAR.

Field	Description
Prescription Required?	Identifies whether or not a prescription is needed to administer the order.
Permissioned?	Identifies whether or not the order requires permission to administer.
Sensitive Order	Identifies whether or not the order is of a sensitive nature.
Medications category	Identifies the category for a medication order.
Questions	
<delete icon>	Click the **delete icon** to delete a question and its fields.
Question 1	Identifies the first question you can enter.
Answer Type	Identifies how the answer will be responded to by the person administering the order. Options are: • Radio Button • Add Flowsheet • Check Box • Text Box • Drop Down • Multi Line Text Box • Date • Date & Time
Required	Select the **check box** to indicate that the questions must be answered.
Global Code Category	Identifies what type of drop down to provide for the answer.
<information icon>	When the global code category is selected, point the cursor at the icon to display the items in the drop down list for the global code.
Laboratories	Inactive field.
Question Code	Inactive field.
Show question at the time of Administration Ordering	Select the radio button that identifies when you want the question presented. Options are: • Administration - present the question when the medication is being administered. • Ordering - present the question when the medication is being ordered.
Add Additional Questions	Click the **hyperlink text** to add the fields to enter another question.
Acknowledgement	
Role	Select the **role** of staff who can acknowledge a radiology order.
Acknowledge	Select the **check box** to present the ability to acknowledge the order.
Acknowledgement Required	Select the **check box** to indicate that the acknowledgement is required for this role.
Pending Release	Identifies whether or not the role indicated has permissions to release the order from a pended status.
Signature Required	Identifies that the order must be signed.
List section	
<delete icon>	Click the **delete icon** to delete the acknowledgement role on the same line.
Role	Identifies the role which has an acknowledgement defined for it.
Acknowledge	Identifies whether or not the role must acknowledge a radiology order.
Acknowledgement Required	Identifies whether or not the role is required to acknowledge a radiology order.
Pending Release	Identifies that the role has permission to release a pending order.
Signature Required	Identifies whether or not a signature is required to acknowledge this radiology order.

Orders List Page Field Definitions

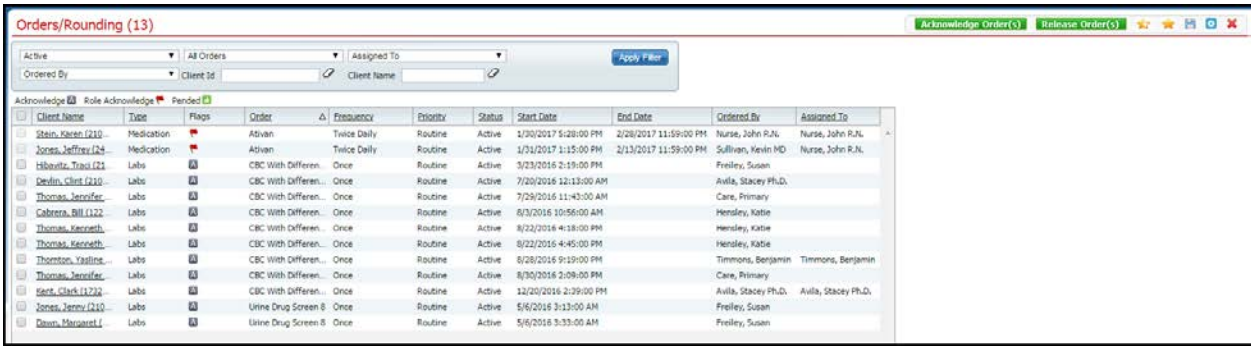


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

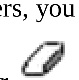
Field	Description
Filter	
Start Date	Identifies the start date of the order. Use the calendar icon to select a date.
End Date	Identifies the end date of the order. Use the calendar icon to select a date.
Received From	Identifies who initiated the order.
All Assigned Staff*	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All assigned staff • Choose a staff member from the list of all staff set up in the system
All Active Status*	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Clinicians • Choose a clinician from the list of all clinicians set up in the system
Client ID	Enter the **Client ID** in this field to search for the specific client.
<eraser> icon 	Use the **eraser icon** to clear any text in the *Client ID* field.
Client Name	Enter the **Client Name** in this field to search for a specific client by name.
<eraser> icon 	Use the **eraser icon** to clear any text in the *Client Name* field.
Ordered By*	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All physicians • Choose a physician from the list of all physicians set up in the system

Field	Description
All Programs*	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All programs • Choose a program from the list of all programs set up in the system
All Types*	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All types of orders • Choose an order type from the list of all order types set up in the system
All Priorities*	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All priorities • Choose a priority from the list of all priorities set up in the system
List	
<check box>	Select a check box to view the labs and requisitions for that order.
Order ID	Identifies the identification number assigned to the order when it was created.
Client Name	Identifies the client's name, last name, first name.
Order	Identifies the name of the order.
Type	Identifies the type of order.
Frequency	Identifies the frequency set up in the order.
Priority	Identifies the priority of the order.
Status	Identifies the status of the order.
Assigned to	Identifies the staff member who the order is assigned to.
Programs	Identifies the program that the client belongs to.
Ordered By	Identifies the physician who place the order.
Start Date	Identifies the start date of the order.
End Date	Identifies the end date of the order.
Date Received	Identifies the date the order was received.
Parent OrderID	Identifies the ID number assigned to the main order which cascades subsequent orders.

Orders Rounding List Page Field Definitions

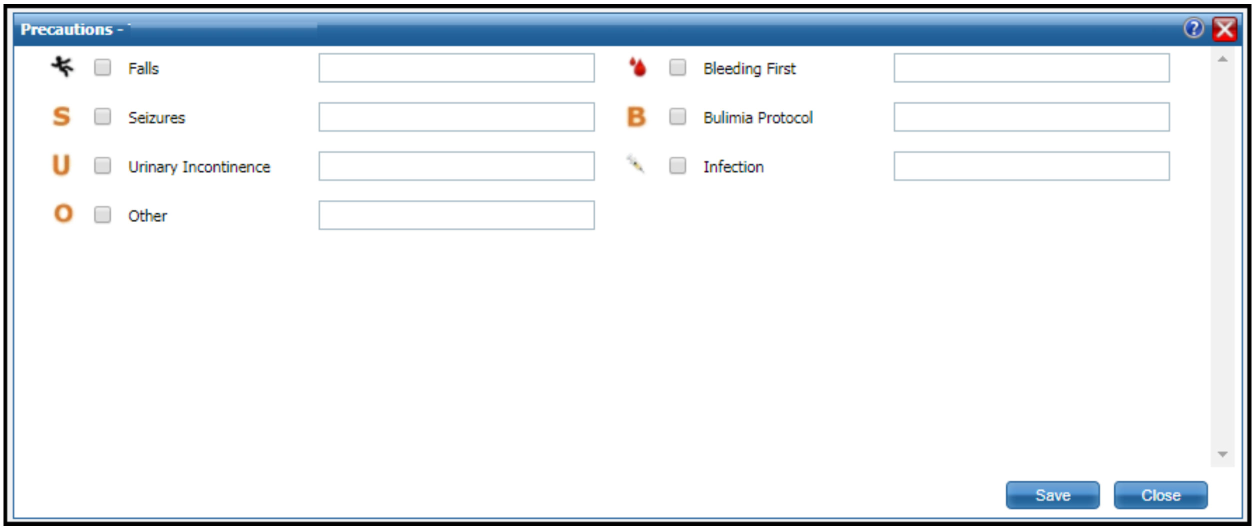


An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
All Statuses	Identifies the status of the client orders you want to view. Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Statuses • Active • Complete • Discontinued • Results Obtained • Reviewed • Sent To Lab
All Orders	Identifies the orders you want to view. Select from the drop-down list to filter records to display in the List area of the page. Options are: • All orders • Medication • Labs • Radiology • Consults • Nursing • Additional • Procedures • Adaptive Equipment
Assigned To	Identifies which staff the client's order is assigned to. Select from the drop-down list to filter records to display in the List area of the page. Options are: • Assigned To • Choose a clinician from the list of all clinicians set up in the system
Ordered By	Identifies which staff entered the order for the client. Select from the drop-down list to filter records to display in the List area of the page. Options are: • Ordered By • Choose a clinician from the list of all clinicians set up in the system
Client Id	To view a specific client's orders, you can enter the client's SmartCare ID. To clear any text in the field, click the eraser  icon.

Field	Description
Client Name	To view a specific client's orders, you can enter the client's last name, first name. To clear any text in the field, click the eraser icon.
Acknowledge	Identifies the icon which means Acknowledge in the List area of the page. The icon indicates that you must acknowledge the order.
Role Acknowledge	Identifies the icon which means Role Acknowledge in the List area of the page. The icon indicates that a staff with a specific role must acknowledge the order.
Pended	Identifies the icon which means Pended in the List area of the page. The icon indicates that the order has been put on hold..
List	
<check box>	Select the **check box** to acknowledge or release an order for the client. Tell me how to acknowledge an order. Tell me how to Release Order(s).
Client Name	Identifies the client's last name, first name (client ID). Click on the **hyperlinked name** to display the *Client Summary* page. View field definitions. (See page 12)
Type	Identifies the type of order. Types are: • Medication • Labs • Radiology • Consults • Nursing • Additional • Procedures • Adaptive Equipment
Flags	Identifies any flag assigned to the order. Icons are: - Acknowledge - Role Acknowledge - Pended
Order	Identifies a description of the order.
Frequency	Identifies the frequency that the order must be carried out.
Priority	Identifies the priority of the order.
Status	Identifies the status of the order.
Start Date	Identifies the start date when the order started.
End Date	Identifies the end date when the order ends.
Ordered By	Identifies the physician who placed the order for the client.
Assigned To	Identifies the staff member who is assigned to carry out the order.

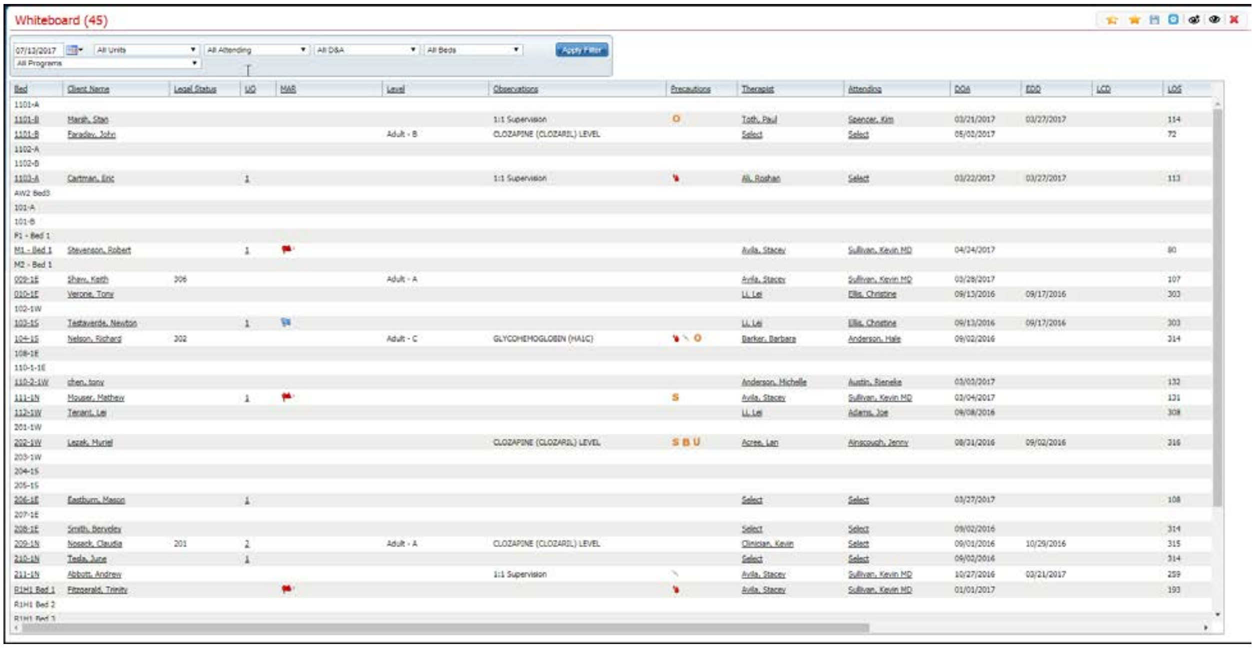
Precautions Window Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Icon	Icon identifies the precaution.
Check box	Use the check box to select the precaution for the client.
Precaution Code	Identifies the name that appears on the Whiteboard.
Precaution Description	Identifies the description that is displayed when you hover the cursor over the icon in the Whiteboard.

Whiteboard Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
Date	Use the calendar icon to select the date of the information you want to view on the Whiteboard.
All Units	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Units • Choose a unit from the list of all units set up in the system
All Attending	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Attending Physicians • Choose an attending physician from the list of all attending physicians set up in the system
All D&A	Drugs & Alcohol. Select from the drop-down list to filter records to display in the List area of the page. Options are: • All D&A • No - does not have a history of drug and alcohol use. • Yes - does have a history of drug and alcohol use. • Yes-C - does have a history of drug and alcohol use with a current CIWA order.
All Beds	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Beds • Open • Occupied

Field	Description
All Programs	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Programs • Choose a program from the list of all programs set up in the system
List	
Bed	Identifies the bed number. Click the **hyperlinked bed number** to display the *Inpatient Activity Details* page - *Activity Details* tab. View field definitions (See page 14).
Client Name	Identifies the client's name: Last name, First name. Click the **hyperlinked name** to display the *Client Summary* page. View field definitions (See page 12). If there are flag alerts set for the client, the *Flag Alert* window appears as well. Click the **OK** button in the *Flag Alert* window to close it.
Legal Status	Identifies the client's legal status as shown in the *Admission Order*.
UO	Unacknowledged Orders. Identifies the number of orders for the client. Click the **hyperlinked number** to view the *Orders/Rounding* page where you can view the unacknowledged orders. View field definitions (See page 49).
MAR	Medication Administration Records. Identifies the medication prescribed for the client. Click the **blue Flag icon** to display the *Client Order* page. View field definitions (See page 7). Click the **red Flag icon** to display the *Client MAR* page. View field definitions. (See page 6)
Level	Identifies the client's level of care as indicated on the Admissions form.
Observations	Identifies the observation(s) that are required for the client. This information comes from an Observation order created in the Orders module.
Precautions	Identifies any precautions set for the client. Tell me how... (See page 4) Click the **icon** to view the *Precautions* window with an explanation. Hover the cursor over a flag to view the definition of the flag and the information entered for the precaution.
Therapist	Identifies the therapist assigned to the client. Click the **hyperlinked therapist's name** to change the assigned therapist. If *Select* appears in the field, click the **hyperlinked word** to select a therapist's name.
Attending	Identifies the client's attending physician. Click the hyperlinked name or word to display the Attending pop-up window and select an Attending physician.
DOA	Date of admission. Identifies the date the client was admitted to the bed.
EDD	Estimated date of discharge. Identifies the date the client is estimated to be discharged.
LCD	Last coverage date. Identifies the last day of coverage. This date is calculated from the last authorization for service. This date can be seen in the Authorization Detail page for this client.
LOS	Length of stay. Identifies the number of days between the admissions date and the current date.
Med/Misc	Identifies a place for a note. Click the **icon** to enter or read the note. You can enter an unlimited number of characters. A blank icon indicates there is no note. This icon indicates a note has been entered.
D&A	Drugs & Alcohol. *Select* indicates no D & A has been entered. Entry options are: • No - does not have a history of drug and alcohol use. • Yes - does have a history of drug and alcohol use. • Yes-C - does have a history of drug and alcohol use with a current CIWA order. **Note:** CIWA is the The Clinical Institute Withdrawal Assessment for Alcohol ten item scale.
Unit	Identifies the name of the Unit where the bed is located.
Primary Plan	Identifies the client's primary payment coverage.

Field	Description
PTC	Paper to Court. Identifies the date paperwork must arrive at court.
Competency	Identifies the client's competency status. *Select* indicates no competency status has been entered. Entry options are: • Competent - displays as C • Incompetent - displays as I • New Admissions - displays as NA

Search

Search for a Client

When you click on the drop-down arrow next to *Open* in the *Bed Census List Page*, the *Search for Client* window is displayed. In this window, you search for the client you want to admit. If the client has already been registered in the system, use that client record to complete the admission. If the client is not found, then follow your office's policy for registering the client.

Searching Best Practices

- To avoid duplicate records, use due diligence to ensure the client is not already entered in the system.
- Use the defined search strategy as explained in the procedure below.
- Use more specific searches found in the *Other Search Strategies* section, as needed.
- If no matches are found, assume the client is new and has not been registered in the system. Follow your office policy for registering the client.

To Search for a Client

1. When the *Client Search* window is displayed, complete the **Name Search, SSN Search** and **DOB Search** fields. View field definitions (See page 55).

2. Click the **Broad Search** button.

3. If no client is found, click the **Narrow Search** button.

4. If no client is found, click the **SSN Search** button.

5. If no client is found, click the **DOB Search** button.

6. When using *Other Search Strategies*, enter the information you want to search on and click the blue button to the left of the field to start the search.

7. If a matching record is found, the information is displayed in the *Records Found* tab.

    a. Verify that the information that is listed matches the client you are working with.

    b. If more than one client is listed, select the open circle to the left of the client line to select the client in the *Records Found* section.

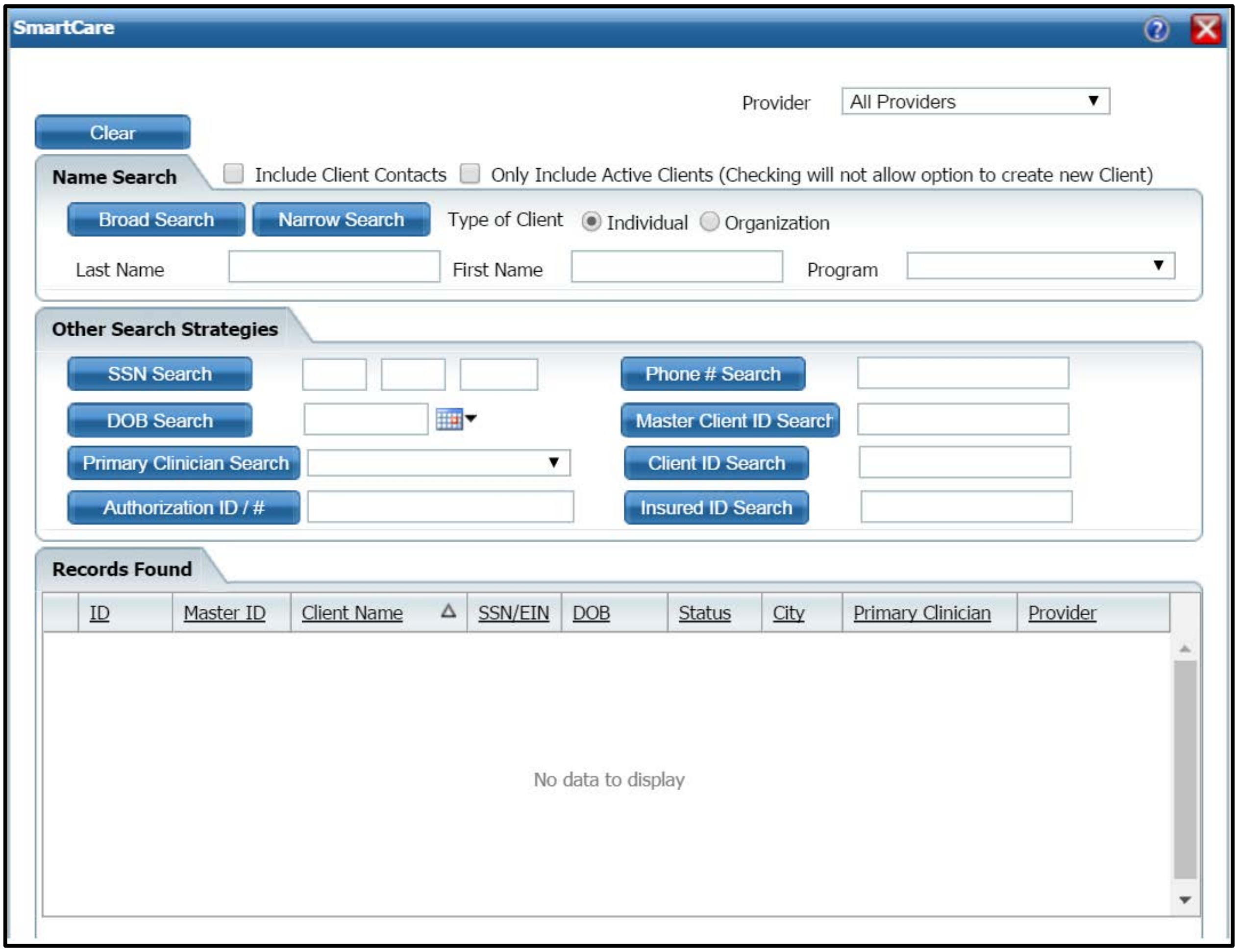
    c. Click the **Select** button.

   -or-

   If no match is found, the client is not registered in the system.

Why can't I access these screens? (See page 61)

Client Search Window Field Definition



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Clear button	Use to clear any information filled in the field before you conduct a new search.
Include Client Contacts	Select the include contacts of the client in the search. Use this check box to include a client's contact person in the search.
Only Include Active Clients	The search only searches through clients marked as Active. If you select this checkbox, you will not be able to create a new client.
Name Search tab	
Last Name	Enter the client's last name that you are looking for. Type up to 30 characters.
First Name	Insert the client's first name that you are looking for. Type up to 20 characters.
Program	Select the Program that the client is registered in.
Other Search Strategies	
SSN Search	Enter the client's social security number in the fields provided.
DOB Search	Enter the client's date of birth in mm/add/yyyy format or select from the calendar icon.
Primary Clinician Search	To search by primary clinician, select the clinician using the drop-down list.
Phone # Search	To search by the client's phone number, type the phone number with no hyphens.
Master Client ID Search	To search by Master Client ID, type the ID number in the field.

Field	Description
Client ID Search	To search by the client's ID, type the ID number in the field.
Insured ID Search	To search by the insured ID, type the ID number in the field. This is the ID that is assigned to the person who carries the insurance for the client.
Records Found	
ID	Identifies the Client's ID assigned in SmartCare.
Master ID	Identifies the Client's Master ID if one is assigned in SmartCare.
First Name	Identifies the client's first name.
Last Name	Identifies the client's last name.
SSN	Identifies the client's social security number.
DOB	Identifies the client's date of birth.
Status	Identifies the client's current status in SmartCare.
City	Identifies the client's city of residence.
Primary Clinician	Identifies the primary clinician assigned to the client.
Provider	Identifies the provider assigned to the client.

Miscellaneous

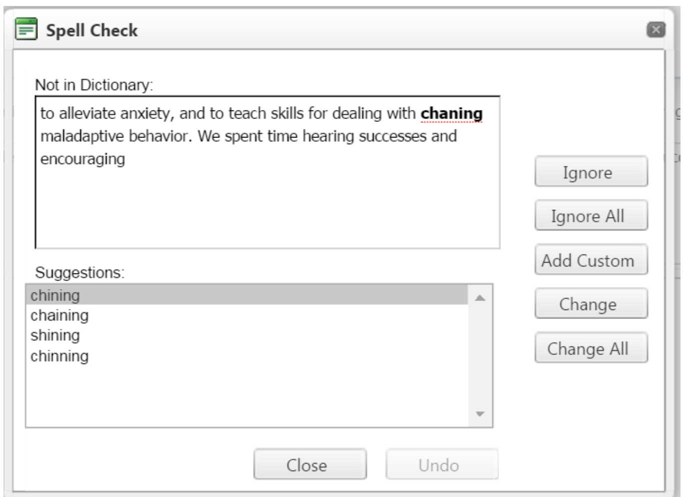
Check for Spelling Errors in a Free-form Comment Field

When you have entered text in free-form comment fields on a page or window, if the spell check icon is present in the task bar, you can check for spelling errors in the comment fields.

1. Complete all comment fields on a page or window.
2. Click the **spell check**  icon in the task bar.

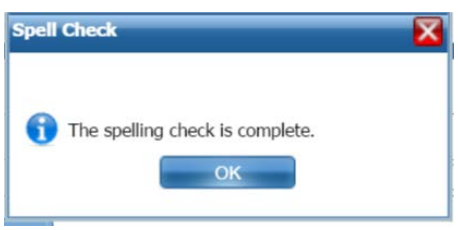
   Spell Check searches all comment fields.

   If a misspelled word is found, the *Spell Check* window is displayed.
3. Notice that the misspelled word is bolded and underlined with a red dotted line in the *Not in Dictionary* panel. Suggestions for correct spellings are listed in the *Suggestions* panel. View field definitions.

   -or-

   If the *Spell check is complete* window is displayed, the spell check is complete.

4. Click the **Yes** button in the *Spell check is complete* window.

   The page you started the *Spell Check* from is displayed.

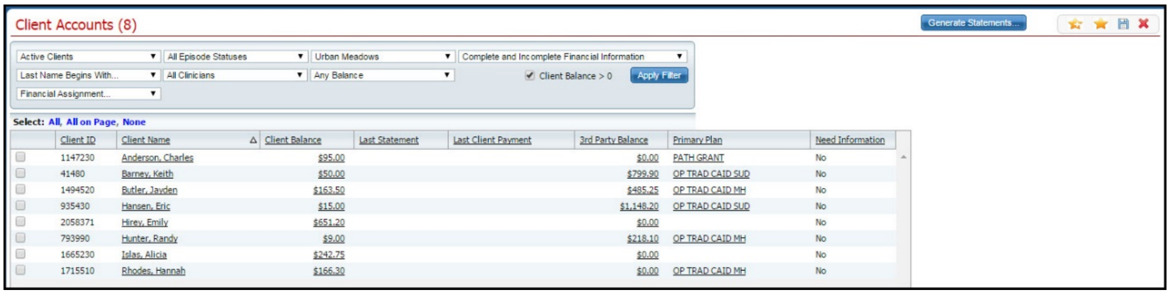
Why can't I access these screens? (See page 61)

Export the Records on the List Page

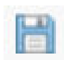
You can export the authorizations on the list page to an Excel spreadsheet.

1. Display the *Authorizations* list page. Tell me how...

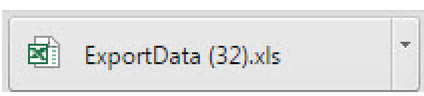
   The *Client Accounts* list page is displayed. View field definitions.



2. Filter the list to determine the records that are displayed. Tell me how...

3. When the records are displayed that you want to export to an Excel spreadsheet, click the **Export**  icon in the tool bar.

   The *ExportData* button is displayed in the footer of your browser window.



4. Click on the **button** to open the Excel file.

   The file is opened in an Excel spreadsheet. You can edit, print and save the file as needed.

Filter a List Page

A list page displays a list of all the content categories on the page. Using the filters you can narrow the list of information that you view. The filters vary depending on the content of the list.

1. Follow a path from a banner selection to display a list page.

   The list page is displayed

2. In the drop-down lists in the *Filter* box, select the items in each drop-down list to limit what is displayed on the page.

3. Click the **Apply Filter** button.

   Note: The filter that you apply to that page remains until you change the filters and click the *Apply Filter* button again.

4. When the list is displayed, click on a **hyperlinked item** to view the detail page for that item.

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access *Permissions:*

1. Follow this path: **Administration tab > User/Role setup banner > Role Definition sub-banner.**

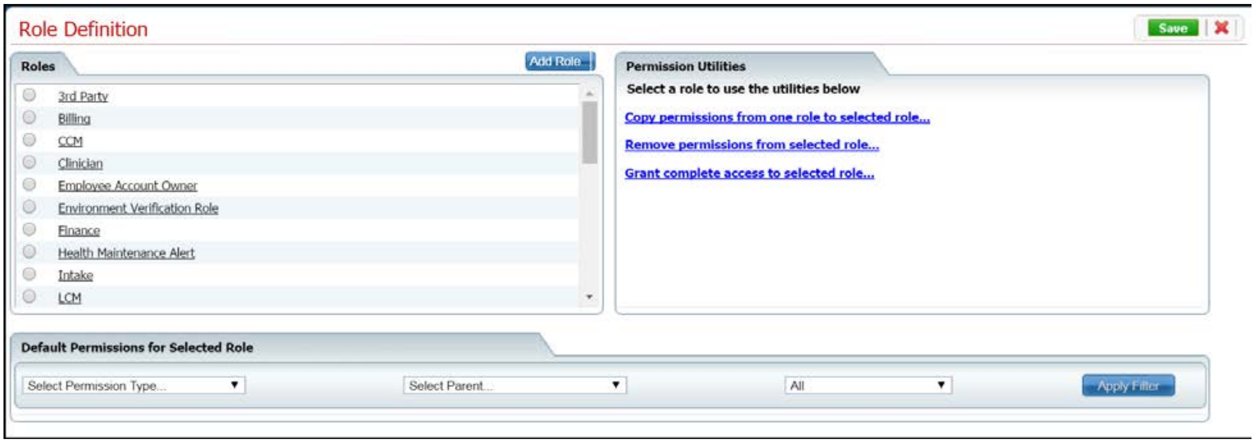
   The *Role Definition* page is displayed. View field definitions (See page 61).

From the *Permissions* page, you can:

Determine Which Permissions Are Needed for the Whiteboard List Page

You Need Permission Type	Parent	Permission Item
Banners	My Office	Whiteboard

Role Definitions Page Field Definitions



An asterisk (*) following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Roles	
Roles	All roles defined in the system. A role defines a collection of permissions to make it easier to assign permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access list pages, screens and windows in SmartCare.
Add Role	Click the **Add Role** button to add a new role to the system and assign permissions to that role.
Default Permissions for Selected Role	
Select Permission Type	Use this drop down list to display one permission type for the selected role.
Select Parent	Use this drop down list to select a specific parent type to view.
All	Use this drop down list to select to view all permissions, Granted permissions or Denied permissions for the selected role.
Permission Utilities	
Selected Role	This field appears if you have selected a role in the *Roles* section.
Copy permissions from one role to selected role	Click the **hyperlink** to copy permissions set up for one role to the Selected Role. When you click the **Save** button, all permission are copied from the role you select in the *Copy Permission from...* drop down list. However, If there are permission already set up on the *Selected Role*, these permission are **not** overridden.
Remove permissions from selected role	Use this option to remove all permissions from the selected role.
Grant complete access to the selected role	Use this option to grant all permissions in the system to the selected role.