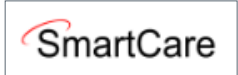# EHR Essentials *A Quick Guide*

Clicking on the **SmartCare** icon will bring you back to your home page.

The **Search** icon will allow you to quickly search for screens and list pages within SmartCare.

The **Client Search** icon will allow you to search for a client by their name or ID number.

Use this paper icon to make a new document.

Use the **Favorite Search** icon to quickly view anything you've saved as a favorite.

Using the **Add Favorite** icon will allow you to bookmark screens and list pages, which keeps all your filtered settings.

Select this to **Close** the current screen or document you are in.

The **History** icon will open a window that displays the last 13 patients and QuickLinks you have accessed in your current session.
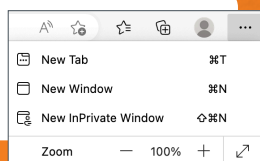
The **Unsaved Changes** icon will display a list of screens that you made changes to but navigated away from before saving.

More Detail: Select this to expand the document ribbon and see more information about the document.

You can use the **Zoom** or magnify settings on your web browser to better view information in SmartCare.

This will bring up the **Walk Me** helper. This is where you can find full walk-throughs of how to complete a process in SmartCare.

Hovering on **Information** will provide you with CalMHSA help text.

The **Help** icon will take you to CalMHSA's Training Tools page. This has user guides and helpful videos.

Client Flag: If a client has a flag, it will appear next to their name.

Smart View makes a pop-up that displays critical information about the client.

Client Information

When you hover over the client's name, a window will pop up with the most important information about the person you're serving.

Notes:

- You can filter **List Page** data in many different ways. This will make it easy to review relevant data very quickly.

- Anything with **underlined text** is hyperlinked and will help you easily navigate in SmartCare.

- **Scan the QR code** for up-to-date training tips and instructional videos.

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