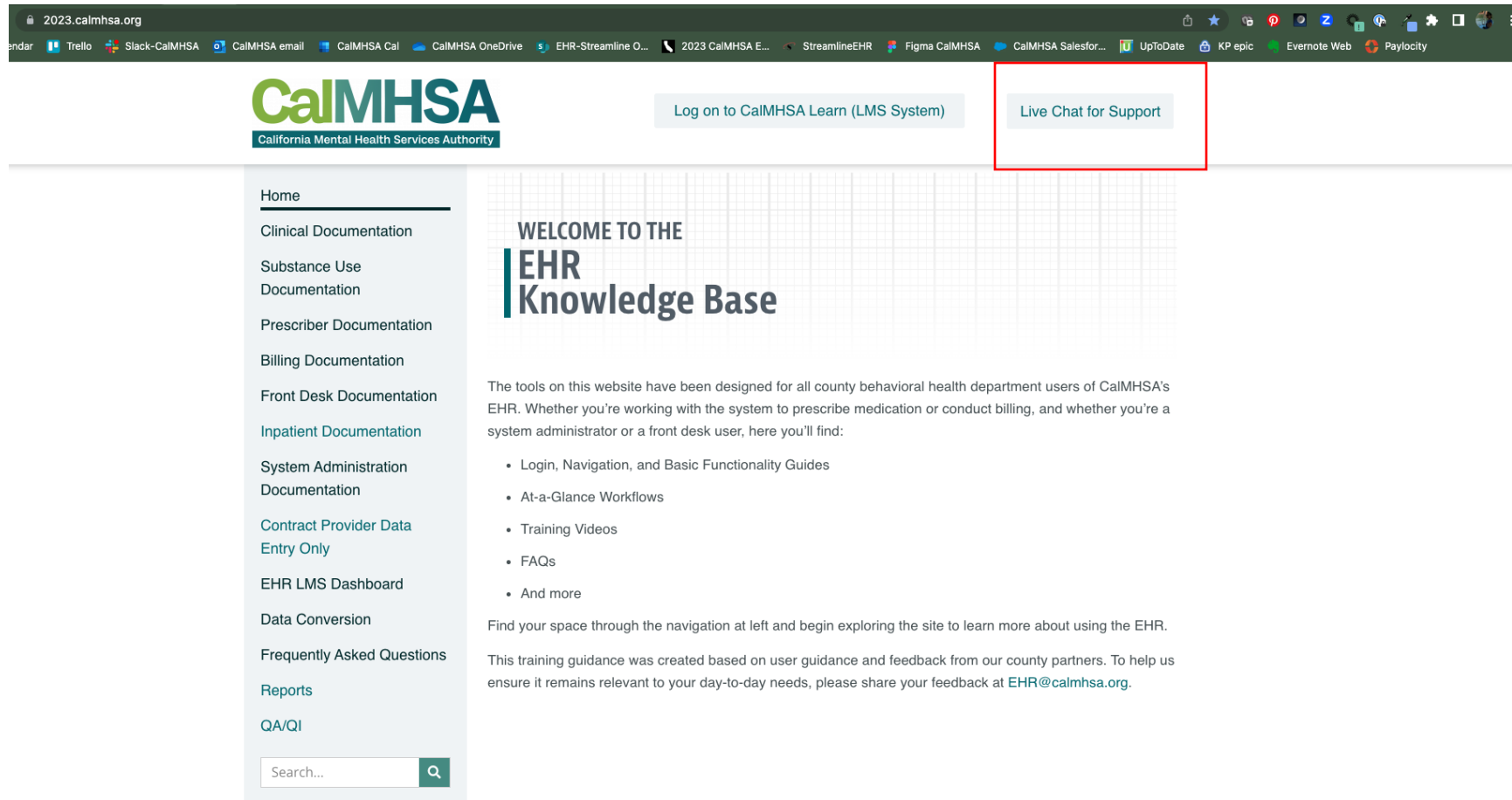**CalMHSA**
California Mental Health Services Authority

INPATIENT/CSU

VISUAL QUICK GUIDE

06.27.23

HELP IS AVAILABLE AT CALMHSA WEBSITE (2023.calmhsa.org)

GOALS

This is a Quick Guide to the Inpatient/CSU prescriber and nurse EHR workflows

- Aims to support user through commonly used tasks. There is also a digital quick guide that can be found here. Please refer to our user guide for inpatient documentation for more details.

- Assumption that user has completed basic training found on CalMHSA website.

- This covers some aspects of residential environment but for more details, but please refer to the "Inpatient CSU and Residential User Guide" for nuances.

- *Reminder:* Ensure your Prescriber and Nurses permissions have the correct user/staff role setup.

HELPFUL ADDITIONAL QUICK GUIDES

There will be a digital quick guide that can be found on website under Inpatient Documentation.

Task you want to do	What it is called in Smartcare?	Pro-tip
View of the unit and patients with key information	Whiteboard (My Office). If you want to toggle between different units, can select " Views" icon on upper right corner	This will give you an overview of the unit/beds/patients admitted. Click on the Client Name's hyperlink and it will bring to client chart.
Reviewing Historical data		
Review previous services/notes	Services/Notes [Client]	Filter "Complete" in services/notes screen. Click hyperlink under "Document" to access a specific note. You can also filter Documents screen by "Signed." If within a note's PDF, use forward or backward arrow to look at notes.
Review previous and current programs	Programs [Client]	Filter "enrolled" for current programs and remove date range to see all programs in the past.
Review Labs	**Lab Result Widget:** A quickview of labs **Lab Result Review:** Complete list of client labs and/or outside lab results that have an appropriate interface with the EHR	You can also use: **Individual Lab Flowsheet:** Can trend and track individual lab trends and/or input POCT results manually. If scanning in any POCT/additional results can do this through "Scanning, My Office" and the pdf will be saved within "Documents, Client."
Review Diagnoses	Diagnosis Document [Client] or within any psychiatric notes	Of note, when clinicians enter problems in their notes, this information will go to Client Clinical Problems, which is a separate list from Diagnosis Document. *This is in development for merging together.*

EHR Essentials ✦ Quick Guide

- **SmartCare** — 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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Medication Management Rx

	Thing You Want to Do	What is it Called? Where Can You Find it?	✦ Pro Tip
1	Send Medications to a Preferred Pharmacy	Preferred Pharmacy	Can select most common site and save for future use as a dropdown when you order a specific medication
2	Record Allergies	Allergies/Intolerance/Failed Trials	Recommended to put allergies here because it will autopopulate notes and be shared with other users. If the allergy is in a similar drug class as a medication you are trying to order, you will not be able to prescribe — switch the allergy to "intolerance" and/or "failed trial."
3	Review Active Medications	Medication List	
4	Review Past Medications	Medication History	Use the right-hand side darker blue button (rather than the lighter blue one).
5	Review Consent	Consent History	Use the right-hand side darker blue button.
6	Order New Medications	New Order	Use the right-hand side darker blue button.
7	Add External Medications	Add Medication	Can add the source of the prescription, who is the prescriber
8	Change an Existing Order	Select Checkbox of Existing Medication and Choose "Change Order"	
9	Refill an Existing Order	Select Checkbox of Existing Medication and Choose "Re-Order"	Cannot do this if controlled substance and will need a new order
10	Patient Medication Consent	Select Checkbox of Medication and Choose "Patient Consent"	This will pull up a document that both prescriber and client can sign. Can select and sign multiple consent all at once.
11	Sign Verbal or Queued Outpatient Medication Orders	Queued/Verbal Orders Widget in Providers Dashboard --> Rx	This will automatically connect you to the orders pending your review.
12	Review New/Changed Medications	After clicking "Prescribe" button, a review screen will appear. If you approve, then choose "prescribe" a second time.	Make sure you check the checkbox under "ready to sign."
13	Approve Controlled Substances	On review screen, after clicking "ready to sign" and "Prescribe," you will be prompted on phone's HID app	Swipe "Approve" green button
14	Review Prescription Status	Click on a hyperlink of a medication name --> Script History -- Check "Status"	Prescribers can view a history of multiple clients in Start Page > Outbound Prescriptions. If nurses are set up as prescriber proxy they can also see prescription status (and refill request). Establishing nurses as "prescriber" does not mean they can prescribe without doctor approval; medication orders will still go through verbal or queued order process.
15	Discontinue Existing Medication	Medication List; click the "X" at left	This will then save in medication history with end date recorded and a pop-up will allow you to record the reason.

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"FAVORITES" SETUP FOR INPT PROVIDERS

Recommended Favorites with suggested titles + filters for efficient provider workflow besides the widgets:

- <u>My documents-In Progress:</u> My documents, All clients, Notes, In-Progress, Due in X Days

- <u>My documents-Completed</u>: My documents, All clients, Notes, In-Progress, Due in X Days

- <u>Messages/Alerts:</u> Received, This month

- <u>Orders, Office: Type Lab, Results Obtained:</u> this will alert you to new lab results that have not yet been reviewed.

- <u>Orders, Office: Type Lab, Completed, Your Name:</u> this will alert you to new lab results that have been assigned to you.
  <u>Client Orders, Office</u> and <u>Client Orders, Client :</u> This is where you can find any inpatient orders and their status. If select "New", then can place new or modify orders. Can select by program/clinic.

To review common client historical data:

- <u>Client Enrolled Programs :</u> [Client], Program, Enrolled

- <u>Client Signed Services/Notes:</u> [Client], Service/Note, All clinicians, All statuses, All procedures, All programs, Show services/care mgmt claims, past 12 months.

- <u>Labs Results Review List [Client]:</u> All results, last 90 days

"QUICKLINKS" SETUP FOR PRESCRIBERS

Recommended QuickLink Favorites:

- Whiteboard, Office

- Bedboard, Office- if responsible for admitting/transferring/swapping beds, discharge. *Not covered in this quick guide, pls refer to guide for details.*

Client Related QuickLinks:

- Client Dashboard

- MAR, Client

- Diagnosis Document

- Flowsheets

- Client Flags Details or can just click on the   + next to client's name

- Medication Management (Rx)- use only for outpatient/discharge medications. For inpatient, use Client Orders
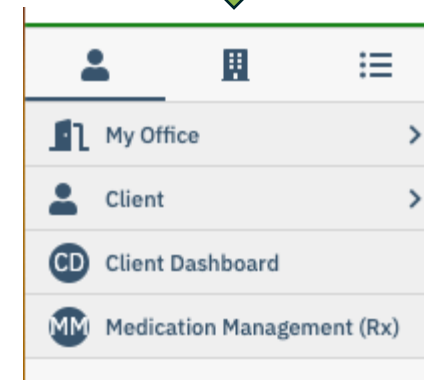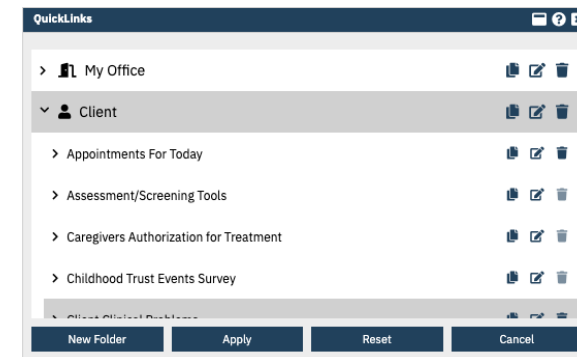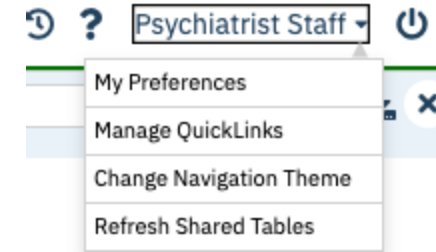
Scroll, select, copy, drag to where you want it show up on your quicklist

Apply and you may need to logout/login again.

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Basic widgets should be updated and pushed by CalMHSA, if the user has the right

role assignment.

PRESCRIBER: These orders are from Medication Management Rx only (which is for outpatient/discharge medications)

This is where you can find documents are still in progress and/or need co-signature including inpatient orders

Widgets editor:

Still editable to move or remove if not needed by individual

Dashboard

Tracking Widget ⓘ

○ Workgroup All Workgroups
● Assigned Staff, Psychiatrist

Tracking Protocol All Flags
○ Tx Team Role All Assigned Roles

Flags Tracked	Due in 90-61 Days	Due in 60-31 Days	Due in 30 Days or Less	Overdue
AIMS	0	0	0	2
Medication Review Due	0	0	0	1

Appointments For Today

Client Name/Description	Time	Status

Verbal/Queued Orders

Verbal	0
Queued	3

Refill/Reject Request

Date Received	Client Name	DOB	Medication	Action

Lab Result

Staff, Psychiatrist

Order Date	Date Resulted	Client Name	Order Name	Status
04/17/2023		Test, Patient	CBC with auto diff	Results Obtained

New Alert/Messages

From	Received	Client	Subject	Message

Assigned Document(s)

	Notes	ISP	Assessment	ALL
Due Now	0	0	0	1
In Progress	11	0	0	34
Due in 14	0	0	0	0
Co-Sign	0	0	0	1
To-Sign	0	0	0	0
Assigned	0	0	0	0

Caseload

	Current	Not Seen in 3 Mos	Last Year
Primary	14	12	0
Total	16	12	0

Save

WIDGETS: CLIENT DASHBOARD

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Basic widgets should be updated and pushed by CalMHSA, if the user has the right role assignment.

SMARTVIEW

Anywhere within a client's EHR, you can also click here in order to have SmartView slide in and you can review widget's data without leaving the current page.

WHITEBOARD

Can toggle between views of types of unit

Original
IP
CSU
Res.
ALL

MAR flags timeliness of medications due

Any un-acknowledged orders. Can also find in "Orders/Rounding" list. To acknowledge the order, pls refer to p. 181 of user guide.

Safety Check and documentation, including S&R. When selected, will restart the time

Shift/Quick Notes

Whiteboard (9)

06/01/2023		All Units		All Attendi		All D&A		All Beds		Apply Filter	
All Programs											

Bed △	Unit	Image	Client Name	MAR	UO	Observations	Next Check	Last Check	Precautions	Legal Status	Misc	Shift Notes	Transp
Bed A													
Bed A		👤							✈ S	Involuntary 💬		Add/Edit	🚗
Bed A		👤					1:54PM ▮	1:39PM	Select	Voluntary 💬		Add/Edit	Select
Bed B		👤		🚩🚩		Seclusion and Restraint			Select	Select 💬		Add/Edit	Select
Bed B		👤		🚩		Seclusion and Restraint			Select	Voluntary 💬		Add/Edit	Select
Bed B													
Bed C													
Bed C													
Bed C													

- White board is a visualization of the unit and beds
- If need to change pt's admission status or bed/room Search for "Bedboard" and/or read p. 41-44 in the "Inpatient CSU and Residential User Guide"

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REVIEWING HISTORICAL DATA

REVIEW LABS

Search for Lab Results Review, Client
Or click the order name

If assigned to a prescriber, then prescriber will find this information in their "Orders, My Office". There is no notification in widget.

Can navigate between labs

Within Lab Result Widget:
Can search for other providers' and what labs have resulted

Lab Result

Lab Result				⚙ 🗑
Admin, System				
Order Date	Date Resulted	Client Name	Order Name	Status
06/25/2021	06/25/2021	Regre, GK	Breathalyzer	Results Obtained

This widget lists the most recently uploaded lab results for your primary clients.

Click the hyperlinked **Order Name** to display the Lab Results Review screen.

If you have administrative permissions, you can use the configuration key, LabsWidgetLookbackMonths, to control how many months back the widget includes. Accepted values are 1, 2, or 3.

Lab Results Review

| | 10/20/2022 | ← | 10/24/2022 - Order Date | → | |

Review ⊟

[Reviewed] [Nurse Reviewed]

○ Normal ○ Abnormal ● Not Specified

Results Review Comment [_____ ▼]   Assigned to [Search Assigned To]

Comments [   ]   Assigned to Comments [   ]

Lab Results Review   [View PDF]

☐ **T-SPOT** - *Results Obtained* -   View Flowsheet
   Reviewer Comments :

Observation	Value	Flag	Range	Status	Observation Date	Analysis Date
COMMENTS:	DNR	N		F	10/18/2022 2:31PM	10/24/2022 11:15AM
Comment:						
Panel A Spot Count	0 NA	N		C	10/18/2022 2:31PM	11/15/2022 2:54PM
Comment:						
Panel B Spot Count	0 NA	N		C	10/18/2022 2:31PM	11/15/2022 2:54PM
Comment:						
T-SPOT TEST RESULT:	Negative	N	Negative	C	10/18/2022 2:31PM	11/15/2022 2:54PM

Comment: A negative test result does not exclude the possibilityPrevious Result: DNRof exposure to or infection with Mycobacteriumtuberculosis (M. tuberculosis). Patients with recentexposure to TB infected individuals exhibiting anegative T-SPOT.TB result should be considered forretesting within 6 weeks or if other relevant clinicalsymptoms indicate. Results from T-SPOT.TB testing mustbe used in conjunction with each individual'sepidemiological history, current medical status,and results of other diagnostic evaluations.The T-SPOT.TB test is qualitative and results arereported as positive, borderline, or negative, giventhat the test controls perform as expected. In linewith the Centers for Disease Control and Prevention's2010 recommendation to report quantitative measurementsalongside the qualitative result, the laboratoryprovides spot counts for informational purposes only.The T-SPOT.TB test should not be interpreted as aquantitative test.

TRACKING OF ALL LABS

Recommend to search for Orders, Office

Can filter based on Type (eg Labs) and Status (eg Active, Results Obtained, Completed, Assigned to a specific staff).

Orders (12)

Start Date		End Date		Received From		Received To		Apply Filter

All Assigned Staff		Client ID		Client Name	
Ordered By		Labs	All Priorities	All Clinic/Locations	
Order Name					

Status dropdown:
- ✓ All Active Statuses
- Active
- Complete
- Discontinued
- Nurse Reviewed
- Results Obtained
- Reviewed
- Sent To Lab
- Action Required

	Order ID	Client Name		pe	Frequency	Priority	Status △	Sub-Status	Assigned To	Programs	Ordered By	Start Date	End Date
☐	32	Test, Patient (10		s			Active			Outpatient MH ...	Staff, Psychiatrist	01/30/2023 12:41 ...	
☐	59	Test, Patient (10		s			Active			Outpatient MH ...	Watson, Chris	03/23/2023 02:16 ...	
☐	257	Shrek, Donkey (1340)	CBC with auto d...	Labs	Once		Active			Outpatient MH ...	Staff, Psychiatrist	06/08/2023 11:10 ...	
☐	258	Shrek, Donkey (1340)	CBC with auto d...	Labs	Once		Active			Outpatient MH ...	Staff, Psychiatrist	06/14/2023 12:52 ...	
☐	270	Test, Patient (1032)	CBC with auto d...	Labs	Once		Active			Outpatient MH ...	Avdejevs, Pavels	06/20/2023 11:49 ...	
☐	276	Shrek, Donkey (1340)	CBC with auto d...	Labs	Once		Active			Outpatient MH ...	Staff, Psychiatrist	06/20/2023 03:31 ...	
☐	31	Test, Patient (1032)	CBC with auto d...	Labs	Once		Complete			Outpatient MH ...	Staff, Psychiatrist	01/29/2023 10:05 ...	
☐	232	Shrek, Donkey (1340)	CBC with auto d...	Labs	Once		Complete			Outpatient MH ...	Staff, Psychiatrist	05/23/2023 02:44 ...	
☐	260	Shrek, Donkey (1340)	CBC with auto d...	Labs	Once		Complete		Staff, Psychiatrist	Outpatient MH ...	Huang, Delphine	06/14/2023 01:01 ...	
☐	265	Shrek, Donkey (1340)	CBC with auto d...	Labs	Once		Complete		Staff, Psychiatrist	Outpatient MH ...	Huang, Delphine	06/14/2023 01:33 ...	
☐	76	Bowers, Pacifica (1...	CBC with auto d...	Labs		Routine	Discontinued			Outpatient MH ...	Bowers, Sarai	03/27/2023 10:27 ...	05/22/2023 06:20 ...
☐	114	Test, Patient (1032)	CBC with auto d...	Labs			Results Obtained			Outpatient MH ...	Staff, Psychiatrist	04/17/2023 02:04 ...	

To Trend Labs, Search for "Flowsheet (Client)" and you can select any part of a lab (eg ANC from CBC) and there will be a flowsheet created for each lab value. POCT test results may be uploaded in "Documents, Client" if PDF or Flowsheet depending on your clinic's workflow.

OPTION #1: TO INPUT LABS THAT ARE POCT OR ADDITIONAL
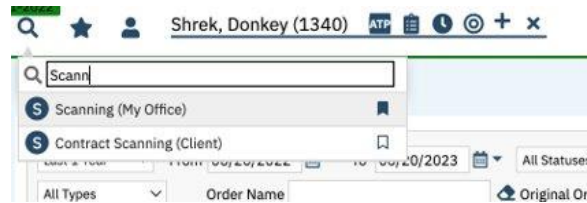
Search "Scanning, My Office" while within a patient's chart.
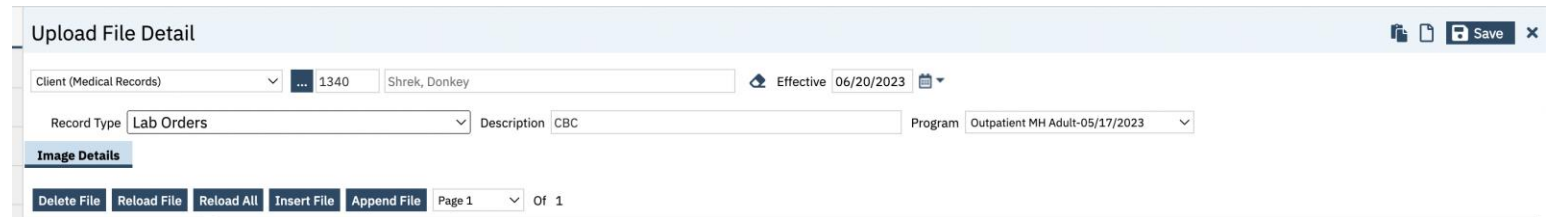
You will be prompted to upload your results, and select client medical records, effective date, Record Type, free text a description which will show on the document header and program.

You will not be able to assign, co-sign or notify prescriber that this has uploaded.

To find this scanned pdf, direct your prescribers/nurse to look under "Documents, Client"

The "Record Type" and "Description" will be listed as the header

OPTION #2: TO INPUT LABS THAT ARE POCT OR ADDITIONAL CAN MANUALLY INPUT IN FLOWSHEETS TO ALLOW FOR TRENDING

Search for Flowsheets, Client
And select which Flowsheet
you would like to use.
Select "New" to input.
To see historical data and
trend, you may need to
backdate.

TO ORDER LABS FOR YOUR PRESCRIBER

Search for the lab. The list will be uploaded by 3rd party lab vendor.

Optional: Select Clinic/Location (will need to be populated by your county's global codes)

Select Frequency, typically "Once"

Of note, future standing lab order functionality is in development

You must select "Add Order" prior to sending or signing the order

TO ORDER LABS FOR YOUR PRESCRIBER AND REVIEW

If you can order prior to prescriber review, then when you hit "Sign" it will send to lab without any prior approval.

Click on the (+) and add the prescriber as a co-signer if you want it reviewed by the prescriber and this will show up on their assigned document's widget.

TO QUEUE LABS FOR YOUR PRESCRIBER

If you need your prescriber to sign prior to sending to the lab, then change the author to prescriber's name and a proxy tracking pop up. Enter your password.

This will go to the prescriber to their assigned document widget and/or My Documents Screen to sign

TO REVIEW VITALS

Search for Flowsheets, Client.

Then choose tab for vitals to review. Make sure to change start date to go back in time if you anticipate more historical data.

Flow Sheet

Vital History	**Graphs**

| Meaningful Use/Vitals ⌄ | Custom Dates ⌄ | Start Date 01/01/2023 📅⌄ | End Date 06/20/2023 📅⌄ | **Apply Filter** |

	05/23/2023 02:37 PM Entered By: Staff, Ps...	05/23/2023 09:00 AM Entered By: Staff, Ps...				
Height	70.00					
Weight	200.00					
BMI	28.69					
Height/Weight N...						
Comments						
Education						
Referral						
Pharmacological...						
Dietary Supplem...						
Exercise/Physic...						
Nutrition Couns...						
BMI Comments						
Systolic	140	190				
Diastolic	90	100				
Pulse		100				

TO INPUT VITALS

From "New" icon from Flowsheets to input vitals

OR

Can Search for "New Entry Flow Sheet"

New Entry Flow Sheet

Date/Time

Select Date	06/20/2023	Enter Time	09:45 PM	Program	Outpatient MH Adult-(∨

Height/Weight/BMI

Height		In	Weight		lb	BMI		kg/m2

Height/Weight Not Obtained

Height/Weight Not Obtained	∨	Comments	

BMI Intervention

- ☐ Education
- ☐ Dietary Supplements
- ☐ Referral
- ☐ Exercise/Physical Activity Counseling
- ☐ Pharmacological Intervention
- ☐ Nutrition Counseling

BMI Comments [ ]

Blood Pressure

Systolic		Diastolic	

Pulse

Pulse [ ] bpm

Respiratory

Respiratory [ ]

Abdominal Girth

INPATIENT NOTES

INPATIENT PSYCH NOTE

Search "Service Note" and select "IP Psychiatric Note.

Make sure that Program is your Inpatient program, and procedure code is " Inpatient Med Support" with the note "IP Medication Support" (99252-99255) based on time.

Make sure to switch from "Scheduled" to "Show" to select the note

Choose radiobutton for IP admission vs IP Progress Note

Of note, the admission and progress note are the same template so will pull the last note information into any subsequent note.

IP Psychiatric Note

Effective 06/26/2023   Status New   Author Huang, Delphine

Service   Note   **Billing Diagnosis**   **Warnings**

Service

Status	Show	Start Date	06/26/2023
Program	Inpatient	Start Time	10:30 AM
Procedure	IP Medication Support	Modifier...	Travel Time	Minutes
Location	Inpatient Psychiatric Facility		
Clinician	Huang, Delphine	Documentation Time	Minutes
Mode Of Delivery	Face-to-face	Face to Face Time	15 Minutes
Cancel Reason		Attending	
		Referring	
Evidence Based Practices			
Transportation Service	No	Interpreter Services Needed	

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IP PSYCH NOTE: DIAGNOSIS

Order is important because 1st diagnosis is payable diagnosis for the service.

Can shift order here.

Create favorites for common diagnoses

Before starting your MDM, check for billing diagnosis and if empty or missing, then go to Notes Tab and then Diagnosis Tab.

Once deleted, in order to find an old diagnosis, go to "Documents, Client" and look at through old psych notes and/or can go also search for old "Diagnosis Document" documents. Psych Note's that have new/modified diagnoses will push to a new Diagnosis Document but will not necessarily make a "saved" diagnosis document so will need to look in both location types of documents

IP PYSCH NOTE: PROBLEMS

Please note that the Problem List is under development, but for now you need to enter at minimum 1 problem wthin the MDM. If you already put in your diagnosis, then it will autopopulate when you click "problem..."

This will NOT populate the "Client Clinical Problems" that are used by clinicians and/or other providers on their progress note template.

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Can search for Client Clinical Problems or it is found within Progress Note (frequently used by clinicians)

The Diagnosis will be found in Billing Diagnosis as part of the Progress Note Template. This was populated either by the Diagnosis Document and/or within the Psych Note Templates for psychiatrists. Order is important because 1st diagnosis is payable diagnosis for the service. Can shift order here.

This comes from Diagnosis Document and/or within the Psych Note Templates for psychiatrists and will auto-populate the "Billing Diagnosis"

If trying to find an old diagnosis, search for "Documents (Client)" and look at through old psych notes and/or can go also search for old "Diagnosis Document" documents.

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OTHER IP PSYCH DOCUMENTATION

Can use, but ONLY on DAY of Admission

- **AssessmentMD (90792):** can use this if reviewing any data with evaluation and assessment (eg MSE) that is separate from the IP Medication and Support Admission/Progress Note. Can be used in the context of meeting with other providers.

- **Medical Team Conference, Participation by Physician. Pt and/or Family Not Present (99368)** Use in the context of meeting with other providers >30m to discuss pt.

- **Consults for New and Established Patients 99242, 99243, 99244, 99245:** Used by any clinical provider (with the right permission/role) who is consulted to evaluate and manage a patient

- **Physician Consultation (99451):** used when meeting with other MD/DO to discuss about a patient.

- **Review of Medical Records (90085):** Used when reviewing any medical record that influences diagnosis decision-making

- **Medication Support and Training (H0034)** : Any medication education/training/support with patient/family.

- **TCM/ICC (1017):** Any care coordination, including medical.

Other documentation: (non-billable)

- Interdisciplinary Treatment Plan
- History and Physical
- Discharge Summary
- Discharge Instructions
- Transfer Summary
- Brief Contact Note
- Shift/Quick Note

- For Seclusion and Restraint, can document by clicking "Next Check" on Whiteboard and it will open the S&R flowsheet.

- Can use Medication Injection (96372) throughout stay

- Delphine, for #1, I know it is a common practice to use the date of admission on the IP Admission note for your scenario as it is defined by the state as a 24 hour period of time. The only issue is that for billing the date of service is what is used whether the med support is paid or not, so it is common to use the day 1 date to avoid the lockout since the Dr. would be seeing the patient within 24 hours. Hope that makes sense. #2 is correct the service would be considered a lockout (not payable) unless it is the day of admission.

INPT/CSU/RES NURSE DOCUMENTATION

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Can use, but ONLY on DAY of Admission

- **Medication Support and Training (H0034)** : Any medication education/training/support with patient/family.

- **TCM/ICC (1017):** Any care coordination, including medical.

- **Team Case Conference with Client/Family present (99366):** used by non-MD providers (with allowable permission/role) meeting together with pt/family

- **Team Case Conference with Client/Family absent (99367):** used by non-MD providers (with allowable permission/role) meeting together without pt/family

Other documentation: (nonbillable)

- Shift Summary
- Personal Effects Inventory
- Nursing Assessment
- Nutritional Screening
- History and Physical
- Interdisciplinary Treatment Plan
- Discharge Summary
- Discharge Instructions
- Transfer Summary
- Shift/Quick Note (can access from Whiteboard)

- For Seclusion and Restraint, can document by clicking "Next Check" on Whiteboard and it will open the S&R flowsheet.

- Can use Medication Injection (96372) throughout stay for RN (For LVT/PT, if on first day of admission can use Medication Training and Support (H0034), otherwise on subsequent days, use Brief Contact note- Nonbillable or Shift/Quick Note- Nonbillable)

INPATIENT ORDERS

REVIEWING INPT AND OUTPT MEDICATIONS WITHIN PSYCH NOTE

IP Psychiatric Note

Effective	06/14/2023		Status	New		Author	Huang, Delphine	▾

Service   **Note**   **Billing Diagnosis**   **Warnings**

General   **Exam**   **Medical Decision Making**   **AIMS**   **Diagnosis**

Medications

The information displayed in the SmartCare Rx section is entered into the SmartCare Rx/Orders module and current read only information is specified below, as applicable on the date seen by provider.

Open SmartCare RX   **View Medication History**   **Orders**

Risk/benefits/side effects have been discussed with the client/guardian and understood   ● Yes   ○ No   ○ N/A

Current Medications

Refresh

Current Medications

Drug Name	Instructions	Start	End	Refills	Prescriber	Comments	Source
Ativan	1mg, Tab, Oral 1.00 each Q4	06/12/2023	06/14/2023	0.00	Easley, Kim MD Medical Doctor	Every 4 hours up to 5 times in a day.	IP
Ativan	1mg, Tab, Oral 2.00 each Q4	06/14/2023	06/15/2023	0.00	Huang, Delphine		IP
Seroquel	300mg, Tab, Oral 1.00 each Twice a day	06/12/2023	07/11/2023	0.00	Easley, Kim MD Medical Doctor		RX
Zoloft	25mg, Tab, Oral 1.00 each Three times a day	06/12/2023	07/11/2023	0.00	Easley, Kim MD Medical Doctor		RX

Self-Reported Medications

Drug Name	Instructions	Start	End	Refills	Prescriber	Comments
Losartan	25mg, Tab, Oral 1.00 each Daily	06/12/2023	07/11/2023	0.00		

TO CREATE SEE AND INPATIENT ORDERS

Can change the status to see what orders are active. Of note, when an order expires it stays active until modified to be "Discontinued"

Select New to create an order and you will get the below pop-up

Client Orders (3)

	From	To		Assigned To	Ordering Physician	
Last 1 Year	06/26/2022	06/26/2023	Active	Assigned To	Ordering Physician	Apply Filter
All Types	Order Name		Original Order ID		All Clinic/Locations	

	OrderId	Type	Name		Frequency	Start Date	End Date	Status	Sub-Status	Ordering Physician	Clinic/Location	Assigned Staff	Parent Order
	44	Medication	Ativan TAB 1MG	💬	Every 4 hours	06/26/2023 12:51 ...	06/28/2023 11:59 ...	Active	Changed	Easley, Kim			42
	43	Medication	Ativan TAB 2MG		Every 4 hours	06/26/2023 11:53 ...	07/03/2023 11:59 ...	Active	Changed	Huang, Del...			
	33	Nursing	Blood Pressure Check		Every 4 hours	06/21/2023 12:47 ...		Active	Changed	Huang, Del...			

Select any order that you wish to modify. If you just need a new order, click "OK" without selecting any checkbox.

Orders Being Modified/Discontinued

Please select the orders you wish to modify or discontinue. Do not need to select any if you are just creating new orders.

	Order	Type	Start Date	Frequency	Status	Ordering Physician	Assigned To
☐	Blood Pressure ...	Nursing	06/21/2023 12:47 I	Every 4 hours	Active	Huang, Delphine	
☐	Ativan TAB 2MG...	Medication	06/26/2023 11:53 /	Every 4 hours	Active	Huang, Delphine	
☐	Ativan TAB 1MG...	Medication	06/26/2023 12:51 I	Every 4 hours	Active	Easley, Kim	

OK   Cancel

This allows you to see what are active outpatient medications.

Other Current Meds

Type	Order	Start Date	Frequency	Status	Ordering Physician	Assigned To
Other	Losartan 25mg, Ta...	06/12/2023 12:00 AM	Daily	Active		
Prescribed	Seroquel 300mg, T...	06/12/2023 12:00 AM	Twice a day	Active	Easley, Kim MD ...	
Prescribed	Zoloft 25mg, Tab, ...	06/12/2023 12:00 AM	Three times a day	Active	Easley, Kim MD ...	

TO PLACE ORDER

If Orderset has been created, click here prior to searching

Search for Order/orderset name

Orders may have defaults that are set by your county, but if you have preferences, then prior to saving the order, click here to save to the "My Preferences" tab.

To discontinue an existing order. You will be asked to put in a reason.

Click on clock to see/change the set times frequencies. Start Date refers to when order is placed, not when time of first order Use "clock" frequency to change times.

Can change rationale through dropdown and/or choose "Other" and fill in textbox. This is for problems/diagnosis

For any other additional text needed (eg to type instruction like eg emergency use etc, can scroll down in the order box to type "Instruction Textbox and/or Comments"

Max quantity allowed in 24 hours is based on dose (units for pills) rather than total dose amount (mg).

Of note, there is no warning if over the limit has been administered previously.

Order | **Order Set** | **Preferences**

Search Adhoc

Ativan (Ativan)

☐ Preference ☐ Discontinued D/C Reason: [____ ▾] ☐ ReOrder

Strength: [1mg, Tab, Oral (/ ▾] ⓘ [_____] Dose: [1.00] Unit: [each ▾] Route: [Oral ▾]

Frequency: [Every 4 hours] ⊙ Priority: [Now ▾] Day Supply: [10] Refill: [0]

Dispense Quantity: [60.00 ▾]

Start: [Other ▾] 06/21/2023 📅▾ 11:35 AM End: 06/30/2023 📅▾ 11:59 PM Potency Units: [____ ▾]

☐ May Self Administer ☐ May Use Own Supply ☐ Consent Required ☐ Dispense Brand

Rationale: [Anxiety ▾] [_____] Max Quantity Allowed in 24 Hours: [3]

Instruction Text: [_____]

Comments: [_____]

Order List Add Additional Orders   Titration Summary   [Modify] [Clear]

	Type	Order	Frequenc	Priority	Status	Start Date	Staff	Interaction	AC
✕ ⊙	Medication	Sarai Ativan 1mg, Tab, ...	Sarai Thre tim...	Now	Active	06/26/2023 1:...	Delphine, Huang		

Can see/modify existing orders.

Titration is only available if set up by your admin.

TO SEE ORDER HISTORY

To see when a medication has been administered and/or future times, can go to MAR and/or click "History of Administration". This will allow you to count your PRNs.

Client Order Details

Order Entry Details

Ordered By	Bowers, Sarai	Order Mode	Verbal	Order Status	Active
Ordering Physician	Bowers, Sarai		☐ Onsite Specimen Collection		☑ Read back and verified

Order   **Review**   **History of Administration**   **Dispense History**
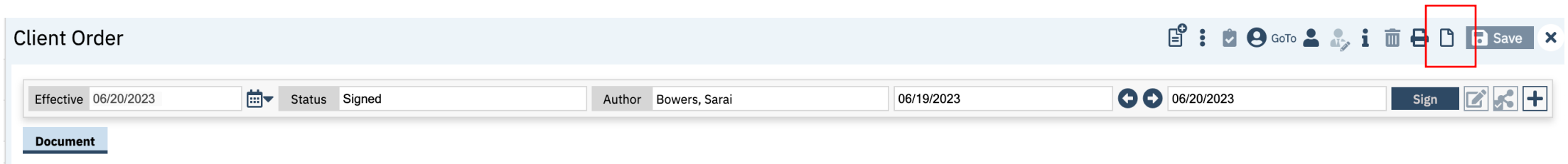
Administration Status	Scheduled Date Time	Admin Date Time	Administered by	Entered by	Comments
Scheduled	05/15/2023 13:00			sbowers	
Scheduled	05/16/2023 08:00			sbowers	
Scheduled	05/16/2023 10:00			sbowers	

THINGS TO KNOW WHEN ORDERING

- Or note, there is no functionality for < 1 hr.

- If need set time frequency that are more than 8 time slots (eg 1 hr glucose check) then may need to create another order to capture more times/day.

- Duplicate orders are not notified nor overridden.

- Max quantity/24 hours is based on the specific order and not necessarily based on previous /duplicate orders.

- When you have orders like q2h, q4h, q6h etc, please note that the set time frequency ("Clock" icon) is based on defaults and will need to be changed if you want it to be based on a certain off-set frequency. It is not based on the time that the order is placed (eg. Start Date/Time). If the PRN option is chosen (eg q4hr as needed PRN) frequency is chosen, then this will be based on when 1st administration date/time.

- There is no weight-based dosing calculation available at this time.

- When it comes to discharging, can discontinue medications within Client Orders, and can order outpatient medications to Medication Management Rx. *Follow instructions on cheatsheet and/or outpt prescriber guide for more information*

- Available universal orders/ordersets include:
    - Admission
    - Discharge
    - Legal Status
    - Food Allergy
    - Latex Allergy
    - Food Preference
    - Physical Activity
    - Safety Check q15m, q30m, q60m
    - Seclusion and Restraint
    - S&R Check
    - Check Vitals
    - Food/ Fluid/Toilet Needs
    - Nursing Free Text Order
    - POCT with flowsheets: Glucose Check, Urine Dip, Urine Drug Tox, Urine Pregnancy
    - Obtain EKG (and print old, if available)
    - Other Denial of Patient Rights

TO CO-SIGN

- To co-sign any document, including orders, once there is a saved pdf, then click on the "+" . Add co-signer.
  There is no option for queuing a client order.

MAR

THE MAR

The MAR is where you can see what are upcoming and due medications and other orders have been selected by your admin to go on the MAR.

PRN orders will be below the dotted line and once administered, will lock out for designated time period based on chosen frequency.

Icons definitions can be found on Inpatient/CSU/Residential User Guide, "ClientMAR: How to Understand the Client MAR Icons" on p. 22

Can toggle between shift times

When there is a "pill" icon then you are within the window to administer. If there is a gray checkbox, then it is upcoming. If there is a "green check" box + "Given", can click into it and document any follow-up.

If prescriber has included a "Max allowed/24 hours" within the order, then MAR assist in how many tablets/mg have been administered.

CalMHSA
California Mental Health Services Authority

Client MAR

Shift Type:	Default	From:		To:		All Orders
Select shift:	06/26 (16:00 to 23:00)	Display:	All	Sort by:	Alphabetical
Order Status:	All Statuses					Apply Filter

DOB 05/15/2002

Order Name	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00
Ativan 1 mg IP ℹ️ 🏺 ℹ️	08:00 💊		10:00 ☑			13:00 ☑		
Sig: Oral 2 each Every 4 hours Max Allowed In 24 Hours: 5 Admin In Last 24 Hours: 2 mg Rationale: Rationale 5 **Note to Pharmacy:**								
Tylenol 325 mg IP ℹ️ 🏺 ℹ️								
Sig: Oral 2 each 4 times a day as needed (PRN) **Rationale:** Rationale 1 **Note to Pharmacy:**								
Sarai Complete Vitals 🕐	08:00		10:00			13:00		

INPT ORDERS TO OUTPT MEDS

TRANSITIONING FROM INPT MEDS TO OUTPATIENT

Within Client Orders, we recommend that you discontinue any inpatient orders.

For any medications that you want to carry forward and/edit, we recommend:

1. Can select medication within Client Orders, modify with date of discharge. This will automatically discontinue inpt medication and create a new one.
2. Go into Medication Management Rx
3. There you will see this new medication listed with ⏸
4. If you want to discontinue or modify an old but active outpatient medication, 𝐑𝐱 can do that within Rx.
5. Select "Complete Order"
6. Follow the steps outlined for Medication Management Rx to complete steps for outpatient medications and patient consent. More details are listed in Prescriber Documentation.
7. Any additional new outpatient medication, can be done through "New Orders" within Medication Management Rx.

| Print List... | Change Order | Re-order | Complete Order | Patient Consent | Gene |

Medication List

					Medication
☐	✕	𝐑𝐱		ⓘ	Zoloft
☐	✕	T		ⓘ	Ativan
☐	✕	T		ⓘ	Ativan
Every 4 hours up to 5 times in a day.					
	✕	💊		ⓘ	Losartan

𝐑𝐱 Prescribed and Active Outpatient Medication	💊 Reported Outpatient Medication from external source or self-reported	IP Inpatient Medication. Can also modify with Rx and/or discontinue

RX FOR OUTPATIENT MEDICATIONS

Please advise: Medication Management Rx opens in separate webpage and if you change to a 2nd patient in SmartCare, the original Rx will continue to be exist and be editable with the 1st patient.

Medication History
Use this one

New orders:
To prescribe

New medication:
Use this to document external medications

Preferred Pharmacy:
Can add up to three favorites

Patient Summary

Patient Search.... | Consent History | Medication History | New Order | Add Medication

Shrek, Donk..(40), DOB/AGE: 5/17/1998 (25), Sex: M, Height: 70 In, Weight: 200 lb

Preferred Pharmacy...

Patient Overview | Reconciliation | Eligibility | Medication History

Name: Shrek, Donkey
Height: 70 In Weight: 200 lb

DOB/Age: 05/17/1998 (25)

Primary Insurance Plan:

Pharmacy: AllianceRx (Cystic Fibrosis Services) Walgreens Prime
Careplus CVS/Pharmacy
FREEDOM/QA TEST

Diagnosis:
F32.A - Depression, unspecified
F90.9 - Unspecified attention-deficit/hyperactivity disorder

Last Medication Visit:

Next Medication Visit:

Allergies/Intolerances/Failed Trials
Show All
Show: ○ All ● Active Only
☐ ✕ 💬 ❶ NSAIDS (Non-Steroidal Anti-Inflammatory Drug) (Intolerances) 05/23/2023

☐ No Known Allergies
[_____] Add Allergy...

Change or Re-order existing medications

Patient Consents: checkbox each medications, then click consent button

Print List... | Change Order | Re-order | Complete Order | Patient Consent | General Medication Consent ▾ | Run Report | Real-Time Med History | ☐ Patient has no prescribed medications

Medication List

					Medication		Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
☐	✕	℞		❶	Ritalin	✓	05/23/2023	20mg, Tab, Oral 1 each Daily 30.00	05/23/2023	06/21/2023		Staff, Psychiatrist MD Medical Doctor	AllianceRx (Cystic Fibros		Staff, Psychiatrist
								20mg, Tab, Oral 1 each Daily 30.00	06/22/2023	07/21/2023			AllianceRx (Cystic Fibros		
To take before work															
☐	✕	℞	ℐ	❶	Sertraline	⚠	05/23/2023	25mg, Tab, Oral 1 each Daily 14.00	05/23/2023	06/05/2023	3	Staff, Psychiatrist MD Medical Doctor	Printed	💬	Staff, Psychiatrist
								25mg, Tab, Oral 2 each Daily 28.00	06/06/2023	07/03/2023			Printed		
	✕	💊		❶	Naprosyn		05/23/2023	500mg, Tab, Oral 1 each Twice a day 60.00	05/23/2023	06/21/2023	3 ▮ I	Clinic			Staff, Psychiatrist
Order Queued for Prescriber Approval															
☐	✕	℞	Ⓐ	❶	Zoloft	⚠	05/22/2023	25mg, Tab, Oral 1 each Daily 30.00	05/22/2023	06/20/2023	▮	Staff, Nurse NP Nurse Practitioner	Printed		Staff, Nurse

**Patient Consents: Can sign one consent for each medication. It will only have 1 dose amount but is acceptable
We are reviewing with SmartCare about adding dose ranges.

RX : KEY FEATURES

CalMHSA
California Mental Health Services Authority

Pharmacist instructions go here

You can save templates for future, faster use

Patient instruction go here

Titrate Steps

New Medication Order

Shrek, Donkey (1340), DOB/AGE: 5/17/1998 (25), Sex: M, Height: 70 In, Weight: 200 lb

Prescribe | Queue Order

Order

- ⦿ Send Directly to Pharmacy
- Pharmacy: AllianceRx (Cystic Fibrosis Services) Walgreens Prime - Pittsburgh, I

- ◯ PrintScript ☐ Print Drug Information ☐ Print Chart C
- Printer: <Manual Selection>

Prescriber: Staff, Psychiatrist MD Medical Do | DEA #: 543456789090 | Order Date: 05/24/2023 | Prescribing Locati: Telehealth | ☐ Verbal Order Read Back

Medication ☑ Permit Changes By Other Users

Drug: Ritalin | Dx/Purpose: | Active Coverage: | ☐ Dispense as Written | Save as Template ◯
Instruction Text: | Desired Outcome: | Comment: | ☐ Include On Prescription ⓘ

Titrate... | Recommended Adult Min/Max Daily Dose Strength: 2.5 mg - 60 mg

	Strength		Dose	Unit	Directions	Rx Start		Days	Dispense Qty	Potency Unit	Additional Orders ⓘ	Sample	Stock	Rx End
✕	20mg, Tab, Oral	ƒ	2	each	Daily	05/24/2023		30	60	Tablet	1			06/22/2023
✕		ƒ												

More Steps | | | Insert | Clear

Medication List | **Formulary**

Note that "unit" does not refer to total dose but typical # tablet

Additional orders allows you to post-date controlled substances

Of note any post-date prescriptions WILL NOT show up when you refresh in your notes because it has not yet been "sent" to the pharmacy

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RX : KEY FEATURES

Verbal Orders:
If you are a proxy for a prescriber and/or the name of author is different from what is selected on the Prescriber, then when you sign hit the "Prescribe" button it will send directly with the pharmacy to fill, and your prescriber will be notified to sign (but will not delay the release of the prescription)

Click the checkbox to acknowledge when you received a verbal order, that you "read back" the prescription to the prescriber.

Queue Orders:
Click here to send to MD/DO to sign the order. This will NOT send to pharmacy without prescriber signing it

Pharmacist instructions go here

You can save templates for future, faster use

Patient instruction go here

New Medication Order

Shrek, Donkey (1340), DOB/AGE: 5/17/1998 (25), Sex: M, Height: 70 In, Weight: 200 lb

[Prescribe] [Queue Order] ✖

Order

○ Send Directly to Pharmacy
Pharmacy AllianceRx (Cystic Fibrosis Services) Walgreens Prime - Pittsburgh, l ▾ 🔍

○ PrintScri☐ Print Drug Information ☐ Print Chart C
Printer <M Selection> ▾

Prescriber Staff, Psychiatrist MD Medical Do ▾   DEA # 543456789090 ▾   Order Date 05/24/2023 ▦▾ Prescribing Locat Telehealth ▾ ☐ Verbal Order Read Back

Medication ☑ Permit Changes By Other Users

Drug Ritalin ⓘ ▾   Dx/Purpose ▾   Active Coverage ▾ ☐ Dispense as Written   Save as Template ○

Instruction Text [   ]   Desired Outcome [   ]   Comment [   ]   ☐ Include On Prescription ⓘ

[Titrate...] Recommended Adult Min/Max Daily Dose Strength: 2.5 mg - 60 mg

	Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Additional Orders ⓘ	Sample	Stock	Rx End
✕	20mg, Tab, Oral ▾ f	2	each ▾	Daily ▾	05/24/2023 ▦▾	30	60 ▾	Tablet ▾	1			06/22/2023
✕	▾ f		▾	▾	▦▾		▾	▾				

[More Steps]   [Insert] [Clear]

Medication List **Formulary**

Titrate Steps

Note that "unit" does not refer to total dose but typical # tablet

Additional orders allows you to post-date controlled substances

Of note any post-date prescriptions WILL NOT show up when you refresh in your notes because it has not yet been "sent" to the pharmacy

EPCS: HID MOBILE APP

EPCS Token: Prescriber's Tasks

The purpose of this document is to help guide the prescriber through the process of setting up their EPCS Token which is needed for prescribing controlled substances.
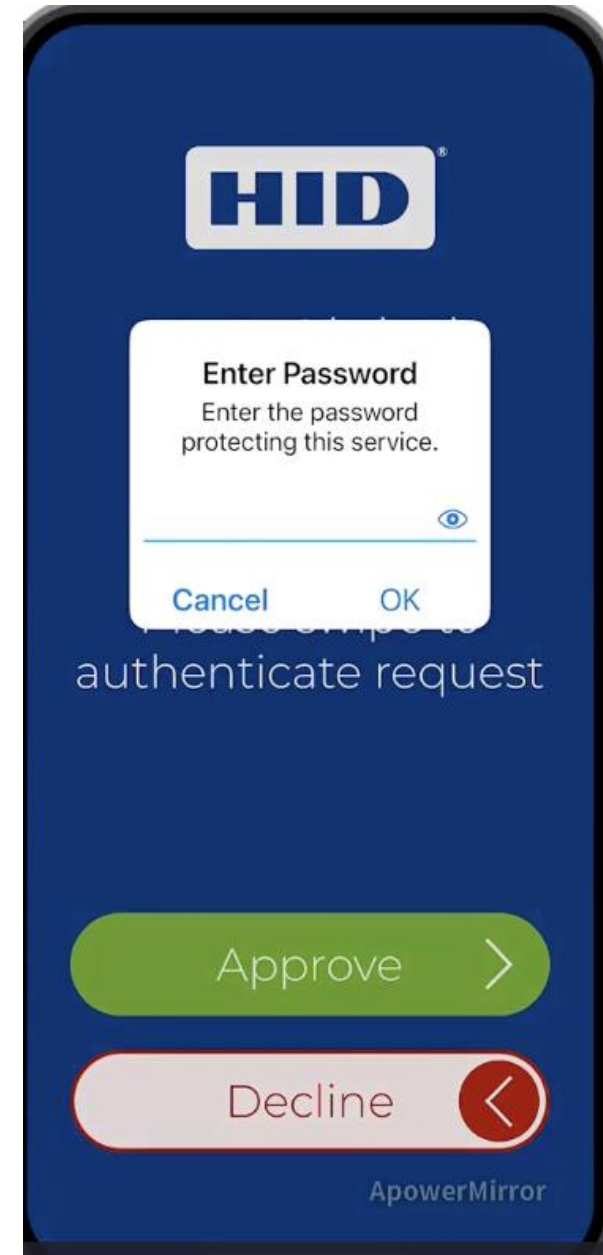
This is a three-step process that will require the prescriber to:
1) Apply for a certificate which requires you to have an iPhone or Android
2) Verification which you will need to wait for 24-48h
3) Install certificates on a computer which helps authorize user with IdenTrust. Consideration should be given as to which computer should be used for this step. Backing up of these certificates is important.

Ready to Sign	Medication	Directions
☐	Adderall XR 10 mg capsule, extended release	1.00 (each) Morning
☐	Adderall XR 10 mg capsule, extended release	1.00 (each) Morning

By completing the two-factor authentication protocol at this time, you are legally signing the prescriptions(s) and authoriz

Must click the checkboxes to finalize order

HID

Enter Password
Enter the password protecting this service.

Cancel   OK

authenticate request

Approve >

Decline <

ApowerMirror

FLAGS/TRACKING PROTOCOLS

These are different places to check for flags.

Can select which tracking flag through the drop down

Can click directly into Flags (Client) to complete task

Provider's dashboard

Client's dashboard

Client Flags, My Office and filter by Flag Name

Search for Client Flags, Office.
Can sort based on flags called "Lab Due" to see all patients that have that particular flag due.

Next to Client Name will be the icon, as a reminder. You can search "Client Flags, Client" to see details or to complete.

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COMPLETING FLAGS

Can assign to a specific workgroup and this will show up in their tracking widget. This information will hold for every subsequent flag that is created.

Client Flag Details

Note Information

Type	Lab Due	ID 46874 Work Group [ ] ☑ Active
Level	Information	Protocol [Labs Due Weekly] Protocol Flag ID 19
Note	Lab Due	☑ This flag recurs

Open Date 06/21/2023 Display Date 06/21/2023 Due Date 06/28/2023 End/Completed Date [ ]

Completed By [ ]

Can choose completion date which determines the next due date.

Link to

○ Nothing

○ Document [ ] Open   Assigned Users [ ]   Assigned Roles [ ]

No data to display   No data to display

Can assign to specific individuals

Comment

[ ]

☐ Permissioned Flag   ☐ Do not display flag   ● Never Pop Up   ○ Always Pop Up

Modify   Clear

Note List ☑ Show Active Only

		Note Type	Work Group	Level	Note	Display	End	Created By	Created On	Provider
✕	○	Lab Due	Sarai CSU	Urgent	Clozapine Lab Due	06/20/2023		calmhsa.del...	06/20/2023	
✕	●	Lab Due		Information	Lab Due	06/21/2023		Labs Due W...	06/21/2023	
✕	○	Sarai CSU Facility ...	Sarai CSU	Information	Sarai CSU Facility ...	05/10/2023		Sarai CSU P...	05/10/2023	