Inpatient/CSU Workflow

Task you want to do	What is it called in Smartcare?	Pro-tip	Detailed Instructions/Video
View of the unit and the patients	Whiteboard [My Office]. If you want to toggle between different units, can select "Views" icon on upper right corner.	*See Whiteboard Quick Guide.* Whiteboard will give you an overview of the unit/beds/patients admitted. Click on the client's name and it will bring you to the chart.	Whiteboard Residential Bedboard Census Summary
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 in Documents screen by "Signed." If within a note's PDF, use forward or backward arrow to look at notes.	How to Save Filters How to Use Filters
Review previous and current programs	Programs [Client]	Filter "enrolled" for current programs and remove date range to see all programs in the past.	How do I know what CDAG I have?
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].	Non-Interface Results p203-204 Lab Interface Results p203-205
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.*	How to Add a Diagnosis How to Delete a Diagnosis How to Modify and/or Re-Order a Diagnosis How to Modify a Diagnosis After the Document is Generated How to Save a Favorite Diagnosis How to Add a Problem to the Problem List How to Remove a Problem That's Been Resolved How to Filter/Sort a Client's Problem List
Write an inpatient admission and/or progress psychiatric note *(Prescribers)*	Search Service Note [Client] , select "Your Program" and "IP Medication Support". Choose radiobutton for either "IP admission" or" IP Progress Note."	Of note, the admission and progress note are the same template, so will pull the last note's information into any subsequent note.	Prescriber: How to Complete the Psychiatric Evaluation How to Amend a Note
Documenting Vitals	Flowsheet[Client]--> Vitals Tab and/or Within IP	By using a flowsheet this allows you to view the recorded data in a	Vitals Flow Sheets

	Medication Support Note, "Exam" Tab	graph format to track trends over time.	
Documenting diagnoses within a service/note	Within all notes: Diagnosis Tab and/or Billing Diagnosis	You can enter the descriptive text or an ICD-10 code and it will auto-filter You will need to designate one primary diagnosis for the service and place it as the #1 spot of order	Document Diagnosis in the IP Psych Note p91-93
Add Problem within IP Medication Support note *(Prescribers)*	Within a note: MDM Tab	When you enter a "Problem" in MDM, it does not save to "Client Clinical Problems," which clinicians will be using. You will need to enter at least 1 problem to complete your note. We recommend that you create your diagnosis first, which will then auto-populate this "Problem." CalMHSA will be developing a different one in the future.	Problem Section p98-99
Calculated Time for Spent *(Prescribers)*	Within a note: MDM Tab	Can enter a different time than what was scheduled under Service Tab. This is the official time that will be used for billing purposes	
Wrapping up IP Medication Support Note	Sign your note	You will get Validation pop-up with direction of where an error is if you cannot sign	How to sign a document p28
Document Safety Checks/Seclusion and Restraint	From whiteboard, click on the time for "Next Check" and/or access through Flowsheet "Safety Check" and/or "S&R Check"	Every time the "Next Check" is selected, it will restart the timer based on time interval of the order	Seclusion and Restraint documentation p158-169
Other inpatient documentation	*All providers:* Interdisciplinary Treatment Plan History and Physical Discharge Summary Discharge Instructions Transfer Summary Brief Contact Note Shift/Quick Note *Nurses/non-MD staff:* Shift Summary Personal Effects Inventory Nursing Assessment Nutritional Screening	*See Inpatient Documentation Quick Guide.* There are few codes that are typically used in the outpatient setting but can be used on the day of admission. Please check with your billing admin about how to use these codes.	How to Complete the Nutritional Screening How to Do Initial Medication Reconciliation Nurse: How to Complete the Nursing Assessment How to Complete the Personal Effects Inventory (PEI) Intake Forms p56-80 Interdisciplinary Treatment Plan p112-118 History and Physical p103-108 Discharge Instructions p224-228 Discharge Summary p229-230 Transfer Summary p230-231 Shift/Quick Note p127 Shift Summary p128
Orders and MAR			

Order Inpatient Orders	Can order within an IP Medication Support Note under MDM and/or Client Orders.	*See Orders and MAR Cheatsheet for more details* This will auto-populate your note if done prior. Refresh to load into your note.	Orders (My Office) - how to review orders Client Orders - how to review orders Create Client Orders p149-158 Seclusion and Restraint p158-174 How to add an order p175-187 Admit order p52
Medication Reconciliation of medications within the programs/systems	*No SmartCare Functionality, in development*	Currently, there is not a good way to do a medication reconciliation, except manually in a note. Can visualize which medications inpatient (Client Orders) and outpatient medications (Medication Management Rx) within the IP Medication Support Note and/or when in client orders can select "add additional orders." The top half is from Client Orders (Inpatient) and the bottom half is from Medication Management Rx (Outpatient).	
Add outpatient medications external of programs/systems	In Medication Management Rx, click on "Add Medication" button	Can add the source of the prescription, who is the prescriber	Adding Medications (Prescribed Elsewhere)
Record Allergies	In Medication Management (Rx) [Client], click on box “Allergies/ Intolerance/Failed Trials.”	This will auto-populate your note if done prior. Refresh to load into your note.	In case of a substance giving an allergy
Documentation of administered medications and/or other orders that have been preselected to show up on the MAR	MAR [Client]	*See Orders and MAR Quick Guide for more details*	Client MAR How to Administer Items on the MAR p189-191
Misc .			
To assign any documents and/or client orders to a co-signers	Once a document is a pdf, can click (+) in the upper right corner. Add cosigner.		How to co-sign a document p29
Co-sign notes and/or sign client orders that need to be co-signed	In provider's dashboard's assigned document widget, can click on "co-sign" to see what orders have been placed by nurse. Click on "client order" to open and co-sign document.	If order is to be acknowledged, then can search for "Orders/Rounding, Client" and click on checkboxes. Select "Acknowledge Order" icon in upper right corner.	Add a co-signer p29
Order discharge medications	In Client Orders, discontinue any inpatient orders. Add medication that you wish to continue and modify for the discharge date. Go into Medication Management Rx to finalize before submitting to pharmacy.	*See Medication Management Rx Quick Guide.* If you are prescribing controlled substances, you will need Identrust's HID mobile app and you will need a staff signature (Your Profile--> My preferences)	Order Discharge Medications p219 Rx: Patient Summary Screen Adding Preferred Pharmacies Discontinuing a Medication Re-Ordering A Medication Changing a Medication Order Patient Consent

		Any queued order by nurses will be sent to prescriber's Queued Qrder widget on their dashboard.	Adding Medications (Prescribed Elsewhere) Medication List Drug/Allergy Interaction Warnings Medication Order Screen
Send/Review Messages	Messages/Alerts or "New Messages/Alerts" widget on Provider's Dashboard	Providers can view incoming new messages from other providers and respond by clicking on the widget's hyperlink. Can also search all messages/alerts under Message/Alert screen. Can attach a document by going to the completed document PDF and sending it as part of a message. Nurses can be added as a proxy by admin to answer messages for physicians.	How to send a message How to send a document in a message
Documenting that Tracking Protocol/Client Flag is complete	Client Tracking and select checkbox if not assigned. Complete pop-up and/or Client Flag by selecting specific flag and filingl in completion date with username.		Document a Flag Complete p62 Tracking widget How to Manually Add a Tracking Protocol to a Client How to Manually Remove a Tracking Protocol from a Client's Record How to Track Clozapine Labs Using Tracking Protocols

Other EHR Tasks:

Smart Care Paper Forms

- Smart Care Paper Consent Forms

Logging in to SmartCare

User Login Process

- Changing Your Password
- Setting up Your Security Questions
- Subsequent Logins

Login Help

- How to Reset Your Password
- How to Recover Your Username
- How to Get Additional Login Assistance

Basic Navigation and Functionality

- How to Use List Pages
- How to Export Data
- How to Sort the Columns
- How to Save Filters
- How to Use Filters