

CaIMHSA

California Mental Health Services Authority

OUTPATIENT NURSE

VISUAL CHEATSHEET WALKTHROUGH

07.07.23

UPDATES

Date	Update	Page #
07.07.23	Note to Pharmacist steps are clarified and preview to pharmacy	30-31

NURSES QUICK GUIDES REVIEW

Outpatient Nurse's quick guides

- **Reminder:** Ensure your Nurse data + correct user/staff role setup

Outpatient Nurse Workflow

Thing You Want to Do	What is it Called?	* Pro Tip
1 See Appointment Schedule, Schedule Appointment, Start Client's Service	Staff Calendar and/or Appointment for Today widget on Provider's Dashboard	Save Staff Calendar as a quick link to easily access your and other providers/offices' calendars. "Appointment for Today" will autopopulate if a client is assigned to you as the primary provider.
2 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 to answer messages for physicians.
3 Look up Client	Person Search Icon	The Person Search icon will autofilter when you type in the first 3 letters and/or medical record number. For a more extensive search, under Person Search icon, select "Client Search."
4 Review Previous Services/Notes	Services/Notes (Client) and/or Documents (Clients)	Filter "Complete" in Services/Notes screen. Click hyperlink under "Document" to access a specific note. You can also filter by "Signed" in Documents screen. If within a note's PDF, use forward or backward arrow to see notes.
5 Review Previous and Current Programs	Programs (Client)	Filter by "Enrolled" for current programs. Remove date range to see all current enrollments.
6 Review Labs	Lab Result widget on client/provider dashboard. A quick view of recent labs. Can toggle between providers. Lab Result Review screen: Complete list of client lab orders. If outside lab results have an appropriate interface with the EHR, and information will pull in automatically for review. To mark that lab has been reviewed, select "Reviewed" vs. "Nurse Reviewed" and assign to a prescriber if needed.	Label as "Lab Results" and write name of the test (eg CBC, TSH, Urine tox screen). This name will populate when search/filtering within Document.
7 Review Diagnoses	Diagnosis Document (Client) and Client Clinical Problems	Of note, when clinicians enter problems in their notes, information will go into Client Clinical Problems. As nurses, can add on Client Clinical Problems list. For diagnoses entered by physicians, search within Psychiatric Notes and/or Diagnosis Document. This is in development for merging together.
8 Review/Document Vitals	Flow sheet (Client), choose "Meaningful Vitals" from dropdown and select "New" if you want to input new vitals.	Using a flow sheet allows you to view recorded data in graph format to track trends.

CalMHSA.org Updated 6/26/23

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Outpatient Nurse Workflow, continued

Thing You Want to Do	What is it Called?	* Pro Tip
9 Choose Procedure Code/Note	Select Service/Notes (Client) and/or click from Calendar or Appointments Today	Common Nurse Procedure Codes based on RN role: - Nursing Evaluation (M001) - Crisis Intervention/Mobile Crisis (H201) - Medication Training and Support (H0034) - Medication Injection (9632) - TCM/ICC (T017)-targeted Case Management - Brief Contact Note (Non-billable)
10 Add to the Client Clinical Problems	Client Clinical Problems screen and/or within the Progress Note. Please note this is shared list with non-psychiatrist roles and not used for billing but to provide transparency of which problems a patient has that are being addressed by different team members.	If your note is a "Progress Note" it will have this functionality. This is different from the Diagnosis Document, which will autofill the Billing Diagnosis, but currently is under development to directly fill the Client Clinical Problems.
11 Confirm the Primary Diagnosis to the Service	Once in the note, select "Billing Diagnosis" tab	You may need to change the order of the diagnoses so that the primary/billable diagnosis for your service is in the #1 spot.
12 Order Labs	Quick Orders (Client). The list of labs should be populated from your 3rd party lab vendor. Any POCT can be added manually by your administrative team.	When you order a lab, it will automatically be sent to the lab. To notify your prescriber, then add as co-signer. If you are only queuing the lab order, then switch the author to your prescriber's name; if you are proxy, enter your password to send order to prescriber to sign.
13 Order Outpatient Medications for Your Prescriber	Medication Management (Rx) (Client) -> Queue Orders / Verbal Order read-back	Can "Queue Order" if you need a prescriber to sign before sending. If you have permission to directly send to a pharmacy, then select your prescriber's name and click "Prescribe." You can check the verbal order read-back to acknowledge that you did this verbally. Can add your prescriber to be co-signer, but the order will be live.
14 Wrap up a Visit	Sign Button on Upper Right	You will get validation pop-up with direction of where an error is if you cannot sign. After care instructions are pending development.
15 Send a Note to Be Assigned	Click on + button on the upper right corner of a signed document, and can assign a co-signer	If notes are written on behalf of a prescriber, assign nurse to be a proxy within the set up role for a specific prescriber.
16 Assessments	Within Client quicklinks -> Assessment/Screening Tools to find full list of other available tools	
17 Reconcile Outpatient Medications Within Programs/Systems	No SmartCare Functionality	This is in development for medications ordered within an internal system. For external medication: Medication Management (Rx) -> "Add medications."
18 Record Allergies	Medication Management (Rx) (Client) -> Allergies/Intolerance/Failed Trials	This will autopopulate the system.

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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 HD 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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QUICK GUIDE : EHR ESSENTIALS

EHR Essentials **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.

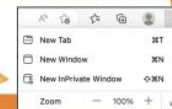


The **Unsaved Changes** icon will display a list of screens that you made changes to but navigated away from before saving.



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.

Name	Rosi, Maria
Chosen Name (Aliases)	
Address	123 Main St Kern, CA 93940
Phone	
Date of Birth	01/01/1940 83 years old
Sex	Female
Pronoun	They
Coverage Plan	
Primary Clinician	MH Adult
Primary Program	Outpatient
Medications	
Pharmacy Phone	
Pharmacy ZIP code	
MCO Provider	

Client information

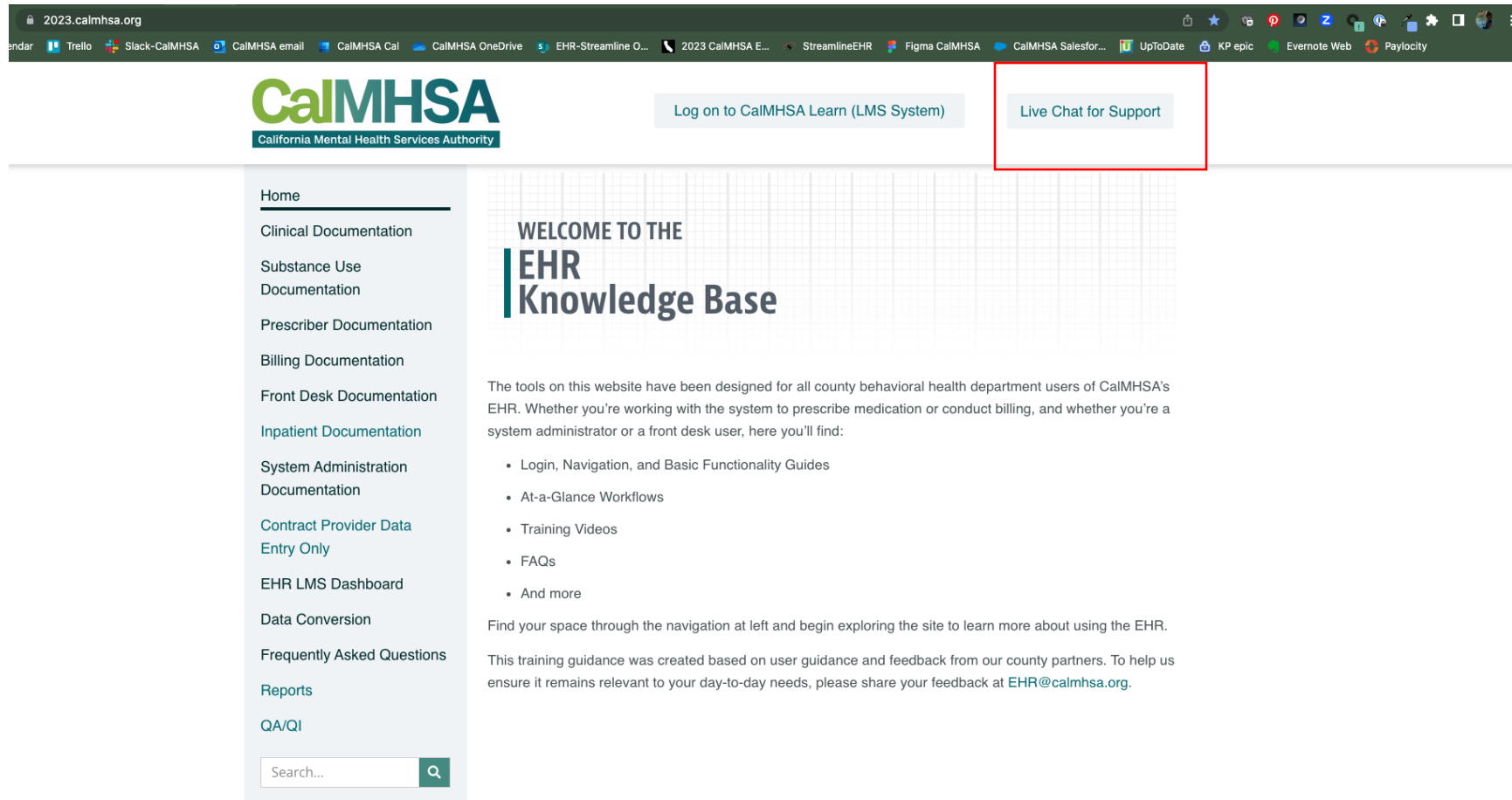
When you hover over the client's name, a window will pop up with the most important information about the person you're serving.

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.



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



2023.calmhsa.org

Log on to CalMHSA Learn (LMS System)

Live Chat for Support

CalMHSA
California Mental Health Services Authority

Home

Clinical Documentation

Substance Use Documentation

Prescriber Documentation

Billing Documentation

Front Desk Documentation

Inpatient Documentation

System Administration Documentation

Contract Provider Data Entry Only

EHR LMS Dashboard

Data Conversion

Frequently Asked Questions

Reports

QA/QI

Search...

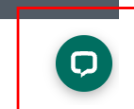
WELCOME TO THE EHR Knowledge Base

The tools on this website have been designed for all county behavioral health department users of CalMHSA's EHR. Whether you're working with the system to prescribe medication or conduct billing, and whether you're a system administrator or a front desk user, here you'll find:

- Login, Navigation, and Basic Functionality Guides
- At-a-Glance Workflows
- Training Videos
- FAQs
- And more

Find your space through the navigation at left and begin exploring the site to learn more about using the EHR.

This training guidance was created based on user guidance and feedback from our county partners. To help us ensure it remains relevant to your day-to-day needs, please share your feedback at EHR@calmhsa.org.



IF YOUR NURSES ARE GOING TO PROXY TO PRESCRIBERS...

Make sure the nurse is assigned with the right proxy permissions and to the right prescribers.

This can be done as an admin role.

Staff Details

General Roles/ Permissions Client Access Overrides Demographic/ Professional **Proc/ Prog/ Loc/ Proxy/ Supervisor** Productivity Staff Preferen

Care Management Contracted Rates Time Sheet Highly Qualified Teacher Reporting Custom Fields

Clinical Data Access Groups

All Clinical Data Access Groups [Add CDAG\(s\)...](#)

Start Date End Date

Only Show Effective CDAGs [Modify](#) [Clear](#)

CDAG Name	Start Date	End Date
<input checked="" type="checkbox"/> 8 - IP/Residential Group		

Programs

Programs with which staff is associated. [Add Program\(s\)...](#)

Program Name
<input checked="" type="checkbox"/> Adult Crisis Resid...
<input checked="" type="checkbox"/> Adult Residential
<input checked="" type="checkbox"/> County Hospital
<input checked="" type="checkbox"/> Crisis Stabilizati...
<input checked="" type="checkbox"/> Inpatient PHF

Proxy

List of staff for whom this person can author a clinical document. [Add Staff...](#)

Staff Name
<input checked="" type="checkbox"/> Staff, Psychiatrist MD Medical Doctor

Prescriber Proxy

List of staff who can manage this person's medications. [Add Staff...](#)

<input checked="" type="checkbox"/> Baize, Jacob
<input checked="" type="checkbox"/> Kumar, Deej
<input checked="" type="checkbox"/> Mabray, Erin
<input checked="" type="checkbox"/> Sinha, Ankita
<input checked="" type="checkbox"/> Sood, Munish
<input checked="" type="checkbox"/> Staff, Psychiatrist

Proxy for Messages

List of staff for whom this person is a proxy for Messages sent by Client and/or Staff [Add Staff...](#)

Staff Name	Client	Staff
<input checked="" type="checkbox"/> Staff, Psychiatris...	<input type="checkbox"/>	<input checked="" type="checkbox"/>

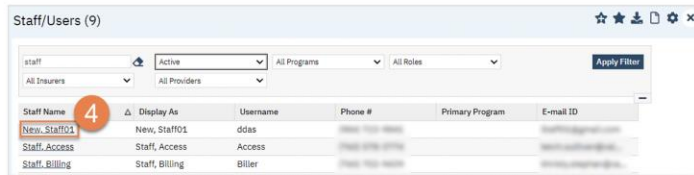
How to Make a Staff/User a Proxy for Another Staff/User

A Proxy is someone who can authorize a document on behalf of another staff/user. An example would be a transcriptionist or scribe. To set someone as a proxy, you need to access the Staff Details of the user who will write the document on behalf of the other user.

1. Click the Search icon.
2. Type "Staff/Users" into the search bar.
3. Select "Staff/Users (Administration)" from the search results.



4. This takes you to the Staff/Users list page. Select the staff who you want to be a proxy.

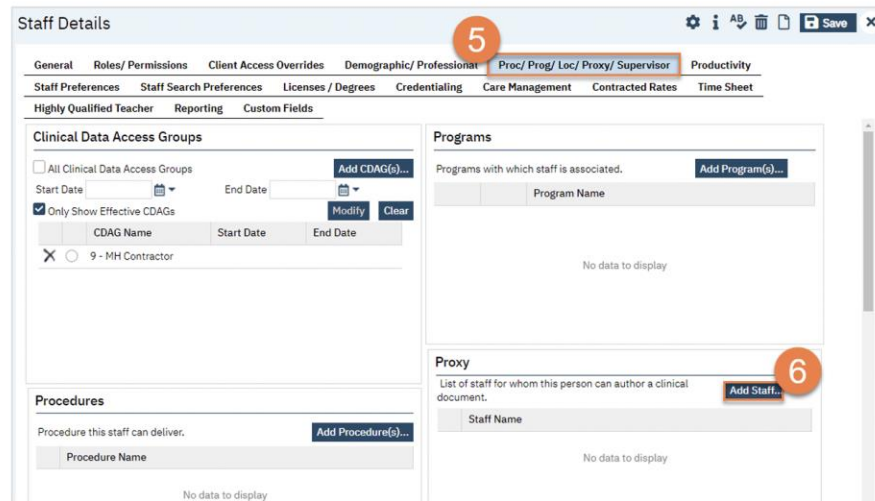


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Specialty Mental Health Services Clinical Documentation User Guide

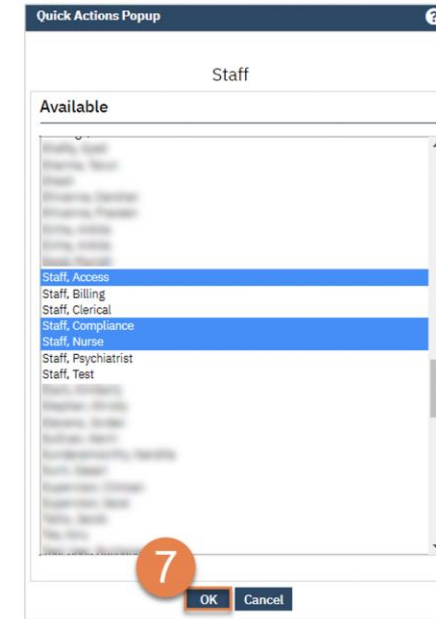
Page 58

5. This takes you to the Staff Details page. Click on the Proc/Prog/Loc/Proxy/Supervisor tab.
6. In the Proxy section, click on the Add Staff button.

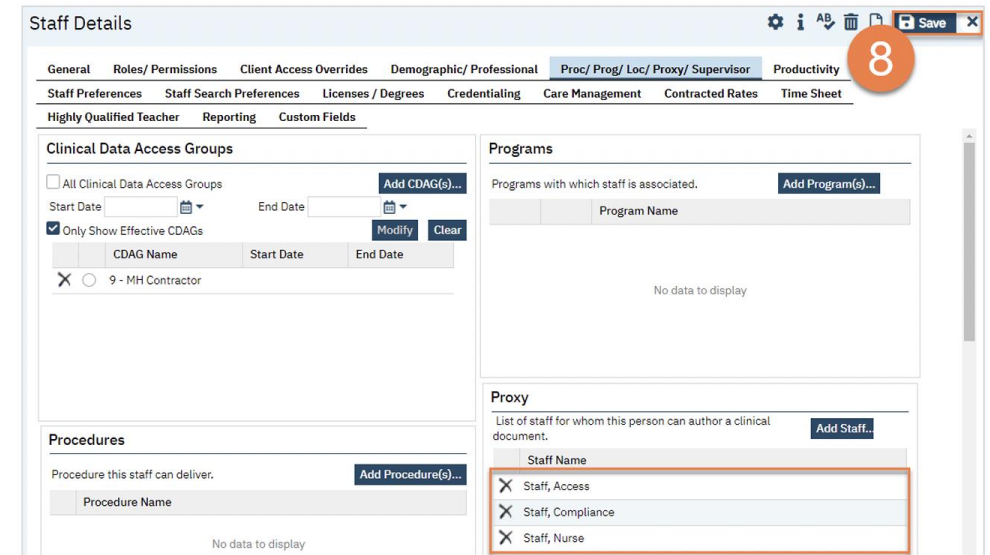


7. This brings up a popup with any staff/users who are not currently set up to be proxied by this user. Select the staff/user(s) you want this user to be a proxy for and click OK. To select more than one staff/user at a time, use the shift and/or control keys.

7. This brings up a popup with any staff/users who are not currently set up to be proxied by this user. Select the staff/user(s) you want this user to be a proxy for and click OK. To select more than one staff/user at a time, use the shift and/or control keys.



8. You should now see these staff/users in the Proxy section. Click save and close.



ASSIGN TO A WORKGROUP...

What is a workgroup? [P124 of Sys Admin Guide](#)

Workgroups are a group of users/staff. These can be used to send messages in the system or to assign tasks to a group of people.

If you create a nurse workgroup, then they will be able to see that workgroup's rather tasks being assigned to single individual

- Tracking widget
- Future Patient Portal – can respond to the patient's messages as workgroup

WIDGETS: NURSE DASHBOARD

Should be updated and pushed by CalMHSA if they have the right role assignment.

Dashboard

✕ + Save

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

Still editable to move or remove if not needed by individual

WIDGETS: CLIENT DASHBOARD

Should be updated and pushed by CalMHSA if they have the right role assignment.

Client Dashboard 🔍 + Save ✕

Summary 🔄

Name : Shrek, Donkey
 DOB : 05/17/1998
 Age : 25 Year
 Home Address : 7884 Maple Dr Merced, CA 93847
 Home Phone :
 E-Mail :

Treatment Team All 🔄

Role	Name
Therapist	Huang, Delphine
Psychiatrist	Staff, Psychiatrist
Therapist	Watson, Chris

Medications All 🔄

Name	Instruction	Start	End
Ritalin	20mg, Tab, Oral 1 each Daily	06/08/2023	07/07/2023
Ritalin	20mg, Tab, Oral 1 each Daily	07/08/2023	08/06/2023

Allergies All 🔄

Allergies	Type
NSAIDS (Non-Steroidal Anti-Inflammatory Drug)	Allergy

Most Recent Lab(0) All 🔄

No data to display

Vitals All 🔄

	05/23/2023	05/23/2023
SBP/DBP	140/90	190/100
BMI	28.69	
Weight	200.00	
Height	70.00	

BMI All 🔄

BMI : 28.69

Weight : 200.00

Immunizations All 🔄

Immunizations Name	Date/Time Immunizations	Immunizations Status
No Information		

"FAVORITES" SETUP FOR NURSES

- Recommended Favorites with suggested titles + filters for efficient nurse workflow, besides looking at the widgets:

- My documents-In Progress: My documents, All clients, Notes, In-Progress, Due in X Days
- My documents-Completed: My documents, All clients, Notes, In-Progress, Due in X Days
- Messages/Alerts: Received, This month
- Orders, Office: Lab, Results Obtained: this will alert you to new lab results that have not yet been reviewed. Can also review "Active" for pending and "Completed" for those have been reviewed.
- Flags Due for all clients in program: Your Program, Your Workgroup, Flag

To review common client historical data:

- Client Enrolled Programs: [Client], Program, Enrolled
- Client Flags: [Client]
- Client Signed Services/Notes: [Client], Service/Note, All clinicians, All statuses, All procedures, All programs, Show services/care mgmt claims, past 12 months. **
- Orders (non-medication, outpatient): [Client], Quick Orders all statuses, all types, all clinics:, from: c-y, end date: c+y, all clinics (gives you orders within 1 year and in the future by 1 year)
- Labs Results Review List [Client]: All results, last 90 days **

The screenshot illustrates the 'Favorites' setup process in the SmartCare system. It shows the top navigation bar with 'Psychiatrist Staff' and a power icon. Below it, a 'Create Document...' dropdown menu is visible, with a red box highlighting the star icon. A green arrow points down to the 'SmartCare' window, which shows a 'Favorite Filter Name' field and a 'Clear' button. Below this, there are date range filters for 'From' (05/24/2022) and 'To' (05/24/2023), with radio buttons for 'Static' and 'Relative'. A table titled 'Favorite Filter Names' contains one entry: 'Clients signed psych notes'. At the bottom of the window, there are 'Ok' and 'Cancel' buttons. A second green arrow points down to the bottom navigation bar, which shows a search icon, a red box around the star icon, a user profile icon, and the text 'Shrek, Donkey (1340)'.

CHECKING WHAT FLAGS ARE DUE

OFFICE/ALL CLIENTS

9-21-2022

Client Flags (696)

Assigned To Staff Assigned To Role Open As of 06/19/2023

Client **Flag** All Flag Types **Work Group** All Work Groups All Protocols

Programs Outpatient MH Adult Status Active Only

ClientId	Client Name	Flag	Assigned Staff	Open Date	Display Date	Due Date	Link To	Completed Date
1239	Training, Manual	AIMS			03/15/2023	03/21/2023		<input type="checkbox"/>
1032	Test, Patient	AIMS	Huang, Delphine; Staff, Ps...	05/22/2023	05/22/2023	05/29/2023	AIMS	<input type="checkbox"/>
1340	Shrek, Donkey	AIMS	Staff, Psychiatrist	05/22/2023	05/22/2023	05/29/2023	AIMS	<input type="checkbox"/>
1028	Xavier, Angela	ASAM		08/30/2022	08/30/2022	08/31/2022		<input type="checkbox"/>
1069	Lamar, Ravens	ASAM		08/30/2022	08/30/2022	08/31/2022		<input type="checkbox"/>
1065	Thomas, LQ	ASAM		08/31/2022	08/31/2022	09/01/2022		<input type="checkbox"/>
1081	Anderson, Allen	ASAM		09/17/2022	09/17/2022	09/18/2022		<input type="checkbox"/>
1089	West, Kenny	ASAM		09/21/2022	09/21/2022	09/22/2022		<input type="checkbox"/>
1095	Hockins, Alicia	ASAM		09/27/2022	09/27/2022	09/28/2022		<input type="checkbox"/>
1098	Brady, Jan	ASAM		11/09/2022	11/09/2022	11/10/2022		<input type="checkbox"/>
1108	CalOMSDetox, Mary	ASAM		11/10/2022	11/10/2022	11/11/2022		<input type="checkbox"/>

SPECIFIC CLIENT

9-21-2022

Shrek, Donkey (1340)

Client Flags (4)

Active Only All Work Groups All Flag Types Effective As Of 06/19/2023

Flag Type	Work Group	Level	Note	Start	End	Created By	Created On
<input type="checkbox"/> AIMS		Information	AIMS Evaluation Needed	05/22/2023		Psychiatrist	05/22/2023 11:34 AM
<input type="checkbox"/> ATP		Information	CalAIM Assessment Needed	05/17/2023		MH Outpatient	05/17/2023 01:28 PM
<input type="checkbox"/> CSI admission	Outpatient Ment...	Information	CSI admission	05/17/2023		MH Outpatient	05/17/2023 01:28 PM
<input type="checkbox"/> Demographics Update Due		Information	Demographics Update Due	05/17/2023		MH Outpatient	05/17/2023 01:28 PM

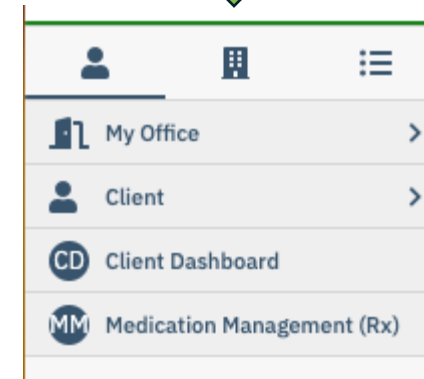
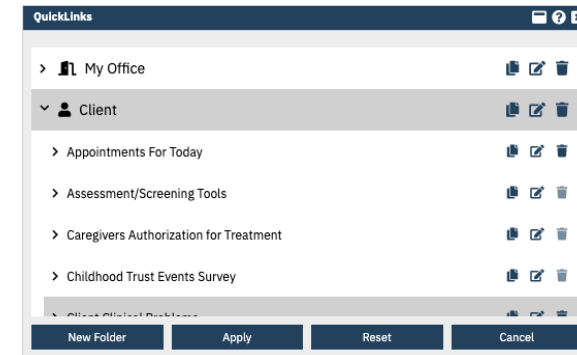
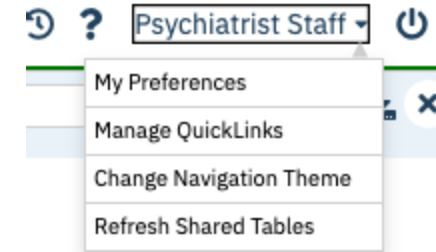
"QUICKLINKS" SETUP FOR PRESCRIBERS

Recommended QuickLink Favorites:

- Staff Calendar

Client Related:

- Client Dashboard
- Diagnosis Document
- Client Problem List
- Medication Management (Rx)
- Quick orders
- Flowsheets
- Client Flags Details or can just click on the + next to client's name

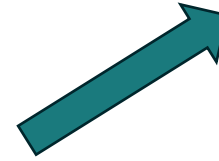


Scroll, select, copy, drag to where you want it show up on your quicklist

Apply and you may need to logout/login again.

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.



The screenshot shows the SmartView interface with a 'GoTo' icon highlighted in a red box. The interface displays the following sections:

- Most Recent Lab:** No data to display.
- BMI:** BMI : 28.69, Weight : 200.00. Includes a gauge chart and a bar chart comparing BMI and Weight for 05/21/2023 and 01/30/2023.
- Vitals:** Table with columns for dates (05/21/2023, 05/19/2023, 01/30/2023) and rows for SBP/DBP, BMI, Weight, and Height.
- Allergies:** Table with columns for Allergies and Type.
- Medications:** Table with columns for Name, Instruction, Start, and End.

	05/21/2023	05/19/2023	01/30/2023
SBP/DBP	140/90	115/80	120/80
BMI	28.69	23.05	26.69
Weight	200.00	170.00	186.00
Height	70.00	72.00	70.00

Allergies	Type
Aristada	Allergy
Aspirin	Intolerances
Bee Pollen	Allergy
Milnacipran	Allergy
NSAIDS (Non-Steroidal Anti-Inflammatory Drug)	Intolerances
Penicillins	Allergy

Name	Instruction	Start	End
Divalproex	125mg, TbEC, Oral 30 each Morning	04/17/2023	06/15/2023
Lamictal	150mg, Tab, Oral 1 each Daily	01/18/2023	02/16/2023

HISTORICAL CLIENT DATA

Outpatient Nurse Workflow

Thing You Want to Do	What Is it Called?	Pro Tip
1 See Appointment Schedule, Schedule Appointment, Start Client's Service	Staff Calendar and/or Appointment for Today widget on Provider's Dashboard	Save Staff Calendar as a quick link to easily access your and other providers/offices' calendars. "Appointment for Today" will autopopulate if a client is assigned to you as the primary provider.
2 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 to answer messages for physicians.
3 Look up Client	Person Search icon	The Person Search icon will autofilter when you type in the first 3 letters and or medical record number. For a more extensive search, under Person Search icon, select "Client Search."
4 Review Previous Services/Notes	Services/Notes [Client] and/or Documents [Clients]	Filter "Complete" in Services/Notes screen. Click hyperlink under "Document" to access a specific note. You can also filter by "Signed" in Documents screen. If within a note's PDF, use forward or backward arrow to see notes.
5 Review Previous and Current Programs	Programs [Client]	Filter by "Enrolled" for current programs. Remove date range to see all current enrollments.
6 Review Labs	Lab Result widget on client/provider dashboard: A quick view of recent labs. Can toggle between providers. Lab Result Review screen: Complete list of client lab orders, if outside lab results have an appropriate interface with the EHR, and information will pull in automatically for review. To mark that labs have been reviewed, select "Reviewed" vs. "Nurse Reviewed," and assign to a prescriber if needed.	Label as "Lab Results" and write name of the test (eg CBC, TSH, Urine tox screen). This name will populate when search/filtering within Document.
7 Review Diagnoses	Diagnosis Document [Client] and Client Clinical Problems	Of note, when clinicians enter problems in their notes, information will go into Client Clinical Problems. As nurses, can add on Client Clinical Problems list. For diagnoses entered by physicians, search within Psychiatric Notes and/or Diagnosis Document. <i>This is in development for merging together.</i>
8 Review/Document Vitals	Flow sheet [Client], choose "Meaningful Vitals" from dropdown and select "New" if you want to input new vitals.	Using a flow sheet allows you to view recorded data in graph format to track trends.

Thing You Want to Do	What is It Called?	Pro Tip
4 Review Previous Services/Notes	Services/Notes [Client] and/or Documents [Clients]	Filter "Complete" in Services/Notes screen. Click hyperlink under "Document" to access a specific note. You can also filter by "Signed" in Documents screen. If within a note's PDF, use forward or backward arrow to see notes.
5 Review Previous and Current Programs	Programs [Client]	Filter by "Enrolled" for current programs. Remove date range to see all current enrollments.
6 Review Labs	Lab Result widget on client/provider dashboard: A quick view of recent labs. Can toggle between providers. Lab Result Review screen: Complete list of client lab orders, if outside lab results have an appropriate interface with the EHR, and information will pull in automatically for review. To mark that labs have been reviewed, select "Reviewed" vs. "Nurse Reviewed," and assign to a prescriber if needed.	Label as "Lab Results" and write name of the test (eg CBC, TSH, Urine tox screen). This name will populate when search/filtering within Document.
8 Review/Document Vitals	Flow sheet [Client], choose "Meaningful Vitals" from dropdown and select "New" if you want to input new vitals.	Using a flow sheet allows you to view recorded data in graph format to track trends.
12 Order Labs	Quick Orders [Client]. The list of labs should be uploaded from your 3rd party lab vendor. Any POCT can be added manually by your administrative team.	When you order a lab, it will automatically be sent to the lab. To notify your prescriber, then add as co-signer. If you are only queuing the lab order, then switch the author to your prescriber's name; if you are proxy, enter your password to send order to prescriber to sign.

REVIEW LABS

Within Lab Result Widget:

Can search for other providers' and what labs have resulted

Lab Result

The screenshot shows a 'Lab Result' widget with a search bar containing 'Admin, System'. Below the search bar is a table with the following data:

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.

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

Can navigate between labs

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

The screenshot shows the 'Lab Results Review' screen. At the top, there are date filters for '10/20/2022' and '10/24/2022 - Order Date'. Below this are tabs for 'Reviewed' and 'Nurse Reviewed', and radio buttons for 'Normal', 'Abnormal', and 'Not Specified'. There is a 'Results Review Comment' dropdown and an 'Assigned to' search box. Below these are text areas for 'Comments' and 'Assigned to Comments'. A 'View PDF' button is visible.

The main section is titled 'Lab Results Review' and shows a table of results for a 'T-SPOT - Results Obtained' test. The table has columns for Observation, Value, Flag, Range, Status, Observation Date, and Analysis Date.

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

Below the table is a detailed comment: 'Comment: A negative test result does not exclude the possibility of exposure to or infection with Mycobacterium tuberculosis (M. tuberculosis). Patients with recent exposure to TB infected individuals exhibiting a negative T-SPOT.TB result should be considered for retesting within 6 weeks or if other relevant clinical symptoms indicate. Results from T-SPOT.TB testing must be used in conjunction with each individual's epidemiological history, current medical status, and results of other diagnostic evaluations. The T-SPOT.TB test is qualitative and results are reported as positive, borderline, or negative, given that the test controls perform as expected. In line with the Centers for Disease Control and Prevention's 2010 recommendation to report quantitative measurements alongside the qualitative result, the laboratory provides spot counts for informational purposes only. The T-SPOT.TB test should not be interpreted as a quantitative 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 Ordered By Order Name

All Active Statuses
 Active
 Complete
 Discontinued
 Nurse Reviewed
 Results Obtained
 Reviewed
 Sent To Lab
 Action Required

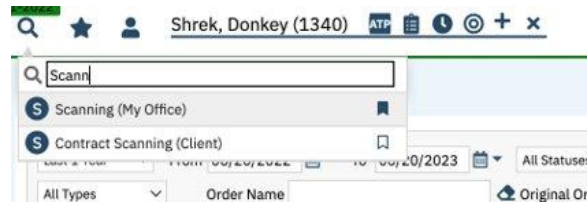
Client ID Client Name

Labs All Priorities All Clinic/Locations

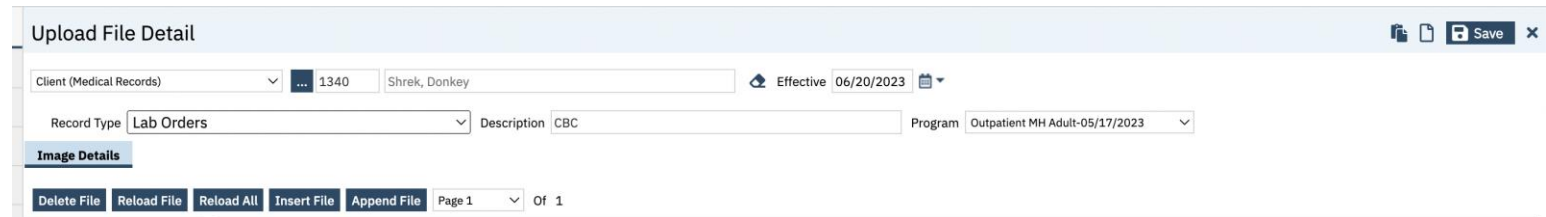
<input type="checkbox"/>	Order ID	Client Name	Type	Frequency	Priority	Status	Sub-Status	Assigned To	Programs	Ordered By	Start Date	End Date
<input type="checkbox"/>	32	Test, Patient (1032)	Labs			Active			Outpatient MH ...	Staff, Psychiatrist	01/30/2023 12:41 ...	
<input type="checkbox"/>	59	Test, Patient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

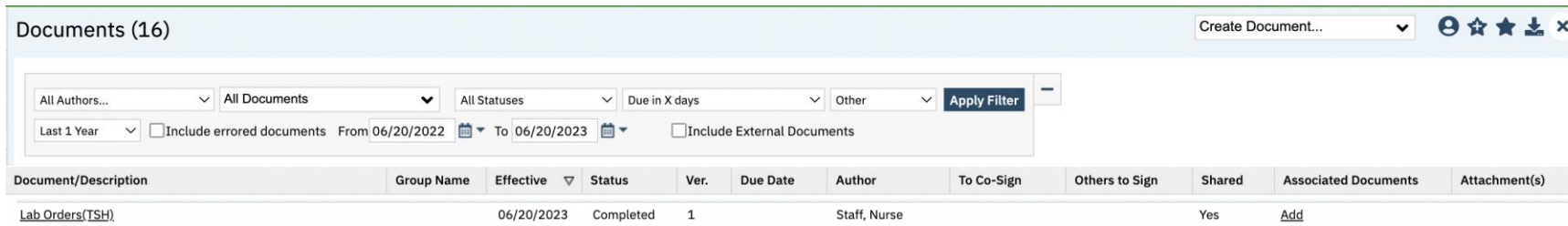


Search "Scanning, My Office" while within a patient's chart.



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.

The screenshot shows a web application interface for managing medical flowsheets. On the left, a sidebar titled "Add Flow Sheet" lists various tests and procedures. On the right, a "Flow Sheet" view is displayed for a "COVID Test".

Flowsheet List (Left):

- COVID Test
- Glucose Check
- Long Acting Injectable (LAI)
- Meaningful Use/Vitals
- MORS Score
- Pediatric Symptom Checklist Score
- PHQ9 Score
- Pregnancy Outcome
- Prenatal Care
- Preventative Care and Screening
- S&R Safety Check
- Sarai Safety Check
- TB PPD Test
- Urine Dip (POCT)
- Urine Drug Tox (POCT)
- Urine Pregnancy Test

Flow Sheet View (Right):

Vital History | **Graphs**

COVID Test | Custom Dates | Start Date | End Date: 06/25/2023 | Apply Filter

	06/25/2023 08:19 AM	06/25/2023 08:18 AM						
Entered By:	Staff, Ps...	Staff, Ps...						
COVID Test Date	06/25/20...	05/01/20...						
COVID Test Comp...	06/25/20...	05/01/20...						
COVID Test Resu...	Positive	Negative						

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

Quick Orders

Effective 06/20/2023 Status In Progress Author Staff, Nurse 06/20/2023 ToSign

Quick Orders

Client Orders

Search Order Clinic/Location: Diagnosis: Add Diagnosis

Frequency: Labs: Ordering Physician: Staff, Psychiatrist Send to Lab

Start: End: Add Order

Order Name	Labs	Frequency	Start Date	Diagnosis	Clinic/Location
✕ CBC with auto diff	LabCorp	Once	06/20/2023 12:55PM		

TO ORDER LABS FOR YOUR PRESCRIBER AND REVIEW

Quick Orders

Effective: 06/20/2023 Status: In Progress Author: Staff, Nurse 06/20/2023 Sign

Quick Orders

Client Orders

Search Order Clinic/Location: Diagnosis: Add Diagnosis

Frequency: Labs: Ordering Physician: Staff, Psychiatrist Send to Lab

Start: End: Add Order

Order Name	Labs	Frequency	Start Date	Diagnosis	Clinic/Location
X CBC with auto diff	LabCorp	Once	06/20/2023 3:17PM		

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.

Quick Orders

Effective: 06/20/2023 Status: In Progress Author: Staff, Nurse 06/20/2023 Sign

Other Versions

1. 06/20/2023_Nurse S...

Signed By

Signer

Add Signer(s)... X Staff, Psychia... Co-Sign Decline

Program

Outpatient MH Adult-05/17/2023

TO QUEUE LABS FOR YOUR PRESCRIBER

Quick Orders

Effective: 06/20/2023 Status: In Progress Author: Staff, Nurse 06/20/2023 ToSign

Quick Orders

Client Orders

Search Order Clinic/Location: Diagnosis: Add Diagnosis

Frequency: Labs: Ordering Physician: Staff, Psychiatrist Send to Lab

Start: End: Add Order

Order Name	Labs	Frequency	Start Date	Diagnosis	Clinic/Location
✕ CBC with auto diff	LabCorp	Once	06/20/2023 12:55PM		

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

Proxy Verification

Proxy Tracking

Author: Staff, Nurse Effective Date: 06/20/2023

Entered By: Staff, Psychiatrist Entered Date: 06/20/2023 03:25 PM

Password:

Agree Clear Cancel

TO REVIEW VITALS

Click "New" icon to input 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

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  Enter Time Program

Height/Weight/BMI

Height In Weight lb BMI kg/m2

Height/Weight Not Obtained

Height/Weight Not Obtained Comments

BMI Intervention

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

BMI Comments

Blood Pressure

Systolic Diastolic

Pulse

Pulse bpm

Respiratory

Respiratory

Abdominal Girth

DIAGNOSIS AND PROBLEM LIST

Outpatient Nurse Workflow

Thing You Want to Do	What Is it Called?	* Pro Tip
1 See Appointment Schedule, Schedule Appointment, Start Client's Service	Staff Calendar and/or Appointment for Today widget on Provider's Dashboard	Save Staff Calendar as a quick link to easily access your and other providers/offices' calendars. "Appointment for Today" will autopopulate if a client is assigned to you as the primary provider.
2 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 to answer messages for physicians.
3 Look up Client	Person Search Icon	The Person Search icon will autofilter when you type in the first 3 letters and or medical record number. For a more extensive search, under Person Search icon, select "Client Search."
4 Review Previous Services/Notes	Services/Notes [Client] and/or Documents [Clients]	Filter "Complete" in Services/Notes screen. Click hyperlink under "Document" to access a specific note. You can also filter by "Signed" in Documents screen. If within a note's PDF, use forward or backward arrow to see notes.
5 Review Previous and Current Programs	Programs [Client]	Filter by "Enrolled" for current programs. Remove date range to see all current enrollments.
6 Review Labs	Lab Result widget on client/provider dashboard: A quick view of recent labs. Can toggle between providers. Lab Result Review screen: complete list of client lab orders. Outside lab results have an appropriate interface with the EHR, and information will pull in automatically for review. To mark that labs have been reviewed, select "Reviewed" vs. "Nurse Reviewed," and assign to a prescriber if needed.	Label as "Lab Results" and write name of the test (eg CBC, TSH, Urine tox screen). This name will populate when search/filtering within Document.
7 Review Diagnoses	Diagnosis Document [Client] and Client Clinical Problems	Of note, when clinicians enter problems in their notes, information will go into Client Clinical Problems. As nurses, can add on Client Clinical Problems list. For diagnoses entered by physicians, search within Psychiatric Notes and/or Diagnosis Document. <i>This is in development for merging together.</i>
8 Review/Document Vitals	Flow sheet [Client], choose "Meaningful Vitals" from dropdown and select "New" if you want to input new vitals.	Using a flow sheet allows you to view recorded data in graph format to track trends.

Thing You Want to Do	What is It Called?	* Pro Tip
7 Review Diagnoses	Diagnosis Document [Client] and Client Clinical Problems	Of note, when clinicians enter problems in their notes, information will go into Client Clinical Problems. As nurses, can add on Client Clinical Problems list. For diagnoses entered by physicians, search within Psychiatric Notes and/or Diagnosis Document. <i>This is in development for merging together.</i>
11 Confirm the Primary Diagnosis to the Service	Once in the note, select "Billing Diagnosis" tab	You may need to change the order of the diagnoses so that the primary/payable diagnosis for your service is in the #1 spot.

CLIENT CLINICAL PROBLEMS VS DIAGNOSIS

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.

Client Clinical Problems (1)

Start Date: 03/01/2023 End Date: [] Include Past Problems [x] Apply Filter

SNOMED Description: [] ICD 10 Code: []

SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date
Housing instability due to imminent risk of homelessness...	1136132023	Z59.811	06/19/2023	06/19/2023

Service Note Billing Diagnosis Warnings Disposition

Billing Diagnosis

ICD 10...

1	F32.A - Depression, unspecified
2	F90.9 - Unspecified attention-deficit/hyperactivity disorder
3	G43.C0 - Periodic headache syndromes in child or adult, not intractable

[Re-Order Diagnosis](#) [Refresh Diagnosis](#)

Progress Note

Effective: 06/19/2023 Status: In Progress Author: Staff, Psychiatrist

Service Note Billing Diagnosis Warnings Disposition

General

Problem Details

Code: [] Description: []

Start Date: 06/20/2023 End Date: [] Program: Outpatient MH Adult Visible to all programs []

Problem List

SNOMED Description	SNOMED CT Code	ICD 10 Code	Start Date	End Date
Housing instability due to imminent risk...	1156192009	Z59.811	06/19/2023	06/19/2023

Problems addressed during this session

Housing instability due to imminent risk of homelessness

Note

Describe current service(s), how the service addressed the beneficiary's behavioral health need (e.g., symptom, condition, diagnosis, and/or risk factors).

We discussed his housing situation which was causing him distress

General Exam Medical Decision Making AIMS Diagnosis

No Diagnosis

Diagnosis

Code: [] Description: []

Rule Out: Type: [] Specifier: []

Severity: [] Source: []

Remission: [] Order: 3 Billable: Yes No

Comments: []

Diagnosis List

Order	DSM 5/ ICD 10	SNOMED	R/O	ICD/ DSM Descriptor	SNOMED Description	Type	Severity	Source	Comments
X	1	F14.188		Cocaine abuse with...		Additional			
X	3	F11.14 14784000		Opioid-induced de...	Opioid-induced org...	Additional	Moderate		
X	4	F12.10 147100...		Cannabis use disor...	Drug abuse in remi...	Additional	Low	SUMa...	
X	2	F32.A 310496...		Depression, unspe...	Moderate depressi...	Primary	Moderate		

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.

ORDERING MEDICATIONS

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 HHD 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.



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 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

Shrek, Donkey (20), DOB/AGE: 5/17/1998 (25), Sex: M, Height: 70 In, Weight: 200 lb

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

Name: Shrek, Donkey
Height: 70 In Weight: 200 lb
DOB/AGE: 05/17/1998 (25)
Primary Insurance Plan:
Diagnosis: F32.A - Depression, unspecified
F90.9 - Unspecified attention-deficit/hyperactivity disorder
Last Medication Visit:
Next Medication Visit:

Change or Re-order existing medications

Patient Consents: checkbox each medications, then click consent button

Medication History Use this one

New orders: To prescribe

New medication: Use this to document external medications

Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
Rilatin	05/23/2023	20mg, Tab, Oral 1 each Daily 30.00 20mg, Tab, Oral 1 each Daily 30.00	05/23/2023 06/22/2023	06/21/2023 07/21/2023		Staff, Psychiatrist MD Medical Doctor	AllianceRx (Cystic Fibros AllianceRx (Cystic Fibros		Staff, Psychiatrist
Sertraline	05/23/2023	25mg, Tab, Oral 1 each Daily 14.00 25mg, Tab, Oral 2 each Daily 28.00	05/23/2023 06/06/2023	06/05/2023 07/03/2023	3	Staff, Psychiatrist MD Medical Doctor	Printed Printed		Staff, Psychiatrist
Naproxen	05/23/2023	500mg, Tab, Oral 1 each Twice a day 60.00	05/23/2023	06/21/2023	3 R I	Clinic			Staff, Psychiatrist
Zoloft	05/22/2023	25mg, Tab, Oral 1 each Daily 30.00	05/22/2023	06/20/2023	R	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

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 Order:
Click here to send to your MD/DO to sign an order. Will NOT send to pharmacy.

You can save templates for future, faster use

New Medication Order

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

Send Directly to Pharmacy

Print Script Print Drug Information Print Chart

Pharmacy: AllianceRx (Cystic Fibrosis Services) Walgreens Prime - Pittsburgh, I

Prescriber: Staff, Psychiatrist MD Medical Do DEA #: 543456789090 Order Date: 05/24/2023 Prescribing Location: 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
X 20mg, Tab, Oral	f 2	each	Daily	05/24/2023	30	60	Tablet				06/22/2023
X	f										

Medication List Formulary

Patient instruction go here

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

RX : NOTES TO PHARMACY

To send a note to pharmacy: First click on checkbox on "Include on Prescription" then it will switch the Comment box to "Notes to Pharmacy" Type your message to pharmacist (VIDEO @ 5:28)
We working to fix this to be more clear.

Change Medication Order

Delphine, David (1024), DOB/AGE: 6/1/1975 (48), Sex: M

Prescribe Queue Order X

Order

Send Directly to Pharmacy

Pharmacy

PrintScript Print Drug Information Print Chart Copy

Printer <Manual Selection>

Prescriber Huang, Delphine MD Medical Doc DEA # 293847565 Order Date 07/07/2023 Prescribing Location Main Office Verbal Order Read Back

Medication Permit Changes By Other Users

Drug Zyprexa Dx/Purpose Active Coverage Dispense as Written

Instruction Text Apply in AM Desired Outcome Note to Pharmacy Pls educate how to inject Include On Prescription

Titrate... Recommended Adult Min/Max Daily Dose Strength: 2.5 mg - 20 mg

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
X 10mg, solr, IM	f 10	mg	Every 4 Weeks (every 28 days)	07/07/2023	28	1.00		1	0	0	08/31/2023
X	f										

More Steps

Modify Clear

Medication List Formulary

		Medication	Date Initiated	Instruction	Rx Start	Rx End	Refills	DAW	Drug/Allergy Interaction Warnings
<input checked="" type="radio"/>	X	Zyprexa	07/07/2023	10mg, solr, IM 10 mg Every 4 Weeks (every 28 days)	07/07/2023	08/31/2023	1	N	

Apply in AM

RX : CONFIRM WHAT YOU ARE SENDING TO PHARMACY

You can confirm what is being sent to the pharmacy



Prescribe

Delphine, David (1024), DOB/AGE: 6/1/1975 (48), Sex: M
Prescription has not yet been submitted. To submit please click the Prescribe button

Change Order

Pharmacy Preview...

Prescribe



Client Information

Delphine, David
Gender: M DOB: 06/01/1975
548 Adams Ave City, CA 98345

Prescriber Information

Huang, Delphine
123 Main St Appleton, CA 92009
P: 800-555-1212 F:
DEA: 293847565

Ready to Sign	Medication	Directions	Quantity	Refills	Order Date	Start Date	End Date	Note to Pharmacy	Special Instructions	Substitutions
	Zyprexa 10 mg intramuscular solution	10.00 (mg) Every 4 Weeks (every 28 days)	1	1	07/07/2023	07/07/2023	08/31/2023	Pls educate how to inject	Apply in AM	Allowed

dtcalmhsarx.smartcarenet.com/CalMHSA Smartcare Rx Sandbox/PreviewPharmacy.aspx

dtcalmhsarx.smartcarenet.com/CalMHSA Smartcare Rx Sandbox/PreviewPharmacy.aspx

Patient: Delphine, David
548 Adams Ave
City, CA 98345

DOB: 6/1/1975
Height: , Date of Height:
Weight: , Date of Weight:
PATIENT ALLERGIES: No Known Allergies

PON: 70-32675-28-1 **Zyprexa 10 mg intramuscular solution, IM** Order Status: Changed

** 1.00 (One) **
Zyprexa 10 mg intramuscular solution, IM 10 (mg) Every 4 Weeks (every 28 days)
Order Date: 7/7/2023 Start Date: 7/7/2023 Days Supply: **28**Days
Refills : **1**
Substitutions Allowed Special Ins.: Apply in AM
Note to Pharmacy: Pls educate how to inject

Dx: F20.0

RX: TITRATION

Can save templates or use other provider's templates

Change Medication Order

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

Order

Send Directly to Pharmacy

Pharmacy AllianceRx (Cystic Fibrosis Services) Walgreens Prime - Pittsburgh, I

Prescriber Staff, Psychiatrist MD Medical Do DEA # 543456789090 Order Date 05/24/2023 Prescrib

Medication Permit Changes By Other Users

Drug Sertraline Dx/Purpose Instruction Text Desired Outcome

Titrate...

Strength

X X

More Steps

Medication List **Formulary**

			Medication
<input checked="" type="radio"/>	X	i	Sertraline

Titration / Taper – Client:Shrek, D

Drug Sertraline Note

Type Titration Taper Refills 0 Dispense as Written

Use Template **Save As Template** **Clear Steps and Start Over**

Titration Step Builder

Step 3 Start 05/24/2023 Days End

	Strength	Dose	Unit	Directions	Dispense Qty	Sample	Stock
X							
X							
X							
X							
X							

Add Step **Clear**

Titration Steps

Can Titrate by add steps

VERBAL OR QUEUED ORDERS TO BE SIGNED BY PRESCRIBERS

Verbal/Queued Orders	
Verbal	<u>2</u>
Queued	<u>1</u>

From the provider's dashboard, can click to queued orders to get to Rx



Can either approve vs change order

Order Approval for Staff, Psychiatrist MD Medical Doctor

Orders	Patient Name	Created By	Order Date	Rx Start Date	Rx End Date	Interactions	Approve All Order
<input checked="" type="radio"/>	Test, Patient (1032)	nurse	05/22/2023	05/22/2023	06/20/2023		<input type="button" value="Approve All Order"/>

Order Details

Patient: Test, Patient DOB/Age: 11/09/1988 (34)

Height: 70 in. Weight: 200 lb

Print Fax Electronic Pharmacy : Test Pharmacy

Prescription Location: Office

Prescription

Monday, May 22, 2023

CalMHSA SmartcareTrain | 09-21-2022

Office

123 Main st
Emeryville, CA 92817

Tel: (789) 098-7898 Fax: (789) 098-7809

RX: ALLERGY VS. INTOLERANCE ON ORDERS

Streamline Healthcare Solutions | SmartCareRx

Patient Summary
Shrek, Donkey (1340), DOB/AGE: 5/17/1998 (25), Sex: M

Start Page

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

Preferred Pharmacy...

Patient Overview Reconciliation Eligibility Medication History

Name: Shrek, Donkey DOB/Age: 05/17/1998 (25) Primary Insurance Plan: Pharmacy:

Diagnosis:
Last Medication Visit: Next Medication Visit:

Allergies/Intolerances/Failed Trials

Show All

Show: All Active Only

× NSAIDS (Non-Steroidal Anti-Inflammatory Drug) (Allergy) 05/22/2023

No Known Allergies

Add Allergy...

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

<input type="checkbox"/>	Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
<input type="checkbox"/>	Order Queued for Prescriber Approval									
<input type="checkbox"/>	X 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

Add Medication: to add external medications

Note that if you chose "allergy" and the medication is in the similar class, you will not be able to order the medication

If you choose "intolerance" or "failed trial", then you can override.

MISC ITEMS

Outpatient Nurse Workflow, continued

Thing You Want to Do	What Is it Called?	* Pro Tip
9 Choose Procedure Code/Note	Select Service/Notes [Client] and/or click from Calendar or Appointments Today if the service is assigned to you already. Under "Service" tab to access note, switch from "Scheduled" to "Show." This will autopopulate with pre-selected note template.	Common Nurse Procedure Codes based on RN role: <ul style="list-style-type: none"> - Nursing Evaluation (T1001) - Crisis Intervention/Mobile Crisis (H2011) - Medication Training and Support (H0034) - Medication Injection (96372) - TCM/ICC (T1017)-Targeted Case Management - Brief Contact Note (Non-billable)
10 Add to the Client Clinical Problems	Client Clinical Problems screen and/or within the Progress Note. Please note this is shared list with non-psychiatrist roles and not used for billing but to provide transparency of which problems a patient has that are being addressed by different team members.	If your note is a "Progress Note" it will have this functionality. This is different from the Diagnosis Document, which will autofill the Billing Diagnosis, but currently is under development to directly fill the Client Clinical Problems.
11 Confirm the Primary Diagnosis to the Service	Once in the note, select "Billing Diagnosis" tab	You may need to change the order of the diagnoses so that the primary/payable diagnosis for your service is in the 1st spot.
12 Order Labs	Quick Orders [Client]. The list of labs should be uploaded from your 3rd party lab vendor. Any POCT can be added manually by your administrative team.	When you order a lab, it will automatically be sent to the lab. To notify your prescriber, then add as co-signer. If you are only queuing the lab order, then switch the author to your prescriber's name; if you are proxy, enter your password to send order to prescriber to sign.
13 Order Outpatient Medications for Your Prescriber	Medication Management (Rx) [Client] --> Queue Orders / Verbal Order read-back	Can "Queue Order" if you need a prescriber to sign before sending. If you have permission to directly send to a pharmacy, then select your prescriber's name and click "Prescribe." You can checkbox the verbal order read-back to acknowledge that you did this verbally. Can add your prescriber to be co-signer, but the order will be live.
14 Wrap up a Visit	Sign Button on Upper Right	You will get validation pop-up with direction of where an error is if you cannot sign. After care instructions are pending development.
15 Send a Note to Be Cosigned	Click on + button on the upper right corner of a signed document, and can assign a co-signer	If notes are written on behalf of a prescriber, assign nurse to be a proxy within the set up role for a specific prescriber.
16 Assessments	Within Client quicklinks --> Assessment/ Screening Tools to find full list of other available tools	
17 Reconcile Outpatient Medications Within Programs/Systems	No SmartCare Functionality	This is in development for medications ordered within an internal system. For external medication: Medication Management (Rx) --> "Add medications."
18 Record Allergies	Medication Management (Rx) [Client] --> Allergies/ Intolerance/Failed Trials	This will autopopulate the system.

Thing You Want to Do	What is It Called?	* Pro Tip
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OPTION #1: TO ASSIGN "CO-SIGNED" NOTES: PROXY; ATTENDING AS PRIMARY

Staff Details

General Roles/Permissions Client Access Overrides Demographic/ Professional **Proc/ Prog/ Loc/ Proxy/ Supervisor** Productivity Staff Preferences

Licenses / Degrees Credentialing Care Management Contracted Rates Time Sheet Highly Qualified Teacher Reporting Custom Fields

Crisis Stabilizati...

Inpatient PHF

Proxy

List of staff for whom this person can authorize a clinical document. [Add Staff...](#)

Staff Name
No data to display

Supervisees

List of Supervisees of this staff. [Add Staff...](#)

If attendings will be doctor for billing, admin can set up nurse/ residents/NPs to be proxy for the doctor. Can change the author of the document to the prescriber.

The attending can go into the note and edit as if they are the primary doctor. This would give the most direct editing ability for the attending.

OPTION #2A:

TO ASSIGN CO-NOTES: RESIDENT/NP WILL BILL

Shift Summary

Effective 04/13/2023 Status Signed Author Rowe, Charla 03/14/2023 Sign

Other Versions

1. 04/14/2023, Charla...

Signed By

1.Charla Rowe ON 04/14/2023 (1)

Signer

Add Signer(s)...

Bowers, Sarai

Huang, Delphine

Co-Sign Decline

Document

PdfBytesHandler.axd

ClientID: 1307

Page 1 of 1

Open Other Service Popup

Authorship

Print Amendment Requests

View Message

Send

Original owner can edit the note.

To assign a co-signer

If there are edits after nurse/resident signs note, from the pdf view, can send messages with this note referenced. Any changes will be documented a "version"; however, latest version will show up in "Documents" [Client]

OPTION #2B: ATTACHING DOCUMENTS TO OTHER DOCUMENTS

Documents (10) Create Document...

All Authors... All Documents All Statuses Due in X days Other **Apply Filter**

Last 1 Year Include errored documents From 05/23/2022 To 05/23/2023 Include External Documents

Document/Description	Group Name	Effective	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Document
Client Orders		05/13/2023	Signed	1		Bowers, Sarai			Yes	Add
Client Orders		04/13/2023	Signed	1		Bowers, Sarai			Yes	Add
Progress Note (Therapeutic Behavioral Services)		04/11/2023	Signed	1		Bowers, Sarai			Yes	Add
CSI Standalone Collection		04/10/2023	To Do	1	4/10/2023	Test, Sarai			Yes	Add
Weekly Note		03/28/2023	Signed	1		Bowers, Sarai		Haro, Bisou	Yes	Add
Medication Inst...									Yes	Add
Medication His...									Yes	Add
Diagnosis Docu...									Yes	Add
Client Orders									Yes	Add
Personal Effect...								Haro, Bisou	Yes	Add

Associate Documents

Associate Documents (118) OK Cancel

Documents Preview

All Clinicians All Documents All Statuses **Apply Filter**

Effective From 05/23/2022 Effective To

Add All	Document	Effective	Status	Author
Add	Medication Reconciliation	04/10/2023	Signed	Sanders, Carman
Add	Adult Medi-Cal Screening Tool	04/07/2023	Signed	Clinician, Robert
Add	Quick Orders	03/23/2023	Signed	Watson, Chris
Add	Progress Note	03/21/2023	Signed	Sullivan, Kevin
Add	Summary of Care	03/15/2023	Signed	Riomaes, Ken
Add	USCDI Summary of Care	03/15/2023	Signed	Riomaes, Ken
Add	USCDI Summary of Care	03/13/2023	Signed	Riomaes, Ken
Add	Progress Note	02/28/2023	Signed	Clinician, Robert
Add	Progress Note	02/16/2023	Signed	Clinician, Robert

List of Associated Documents

Document	Effective	Status	Author
<input checked="" type="checkbox"/> Adult Medi-C...	04/07/2023	Signed	Clinician, R...



Can associate certain notes and specific types of screens to an another document

Once, we develop a non-billable note, then this could be potentially used as Attestation Note that can be added to the primary note

IF YOUR PRESCRIBER WANTS TO COSIGN NOTES

if there are a bunch of notes, then you can batch sign

In provider dashboard you can select to co-sign

Documents	Notes	ISP	Per Rev	All
In Progress	0	0	0	14
To Sign	0	0	0	0
To Co-Sign	0	0	0	4
To Acknowledge	0	0	0	0
To Be Reviewed	0	0	0	2
Due in 14		0	0	2

Batch Signature

Client: Bowers, Pacifica Document: Shift Summary

Effective: 04/13/2023 Status: To Cosign Version: 1 Approved: 1 of 4

Document List

Name	Effective	Document	Author
<input checked="" type="checkbox"/> Bowers, Pac...	04/13/2023	Shift Summary	Rowe, Charla
<input checked="" type="checkbox"/> Lamar, Rave...	04/10/2023	Suicide Risk...	Test, Sarai
<input checked="" type="checkbox"/> John, Elton	04/10/2023	Suicide Risk...	Test, Sarai
<input type="checkbox"/> Lamar, Rave...	04/06/2023	Scanned Medi...	Test, Sarai

ClientID: 1307

CalMHSA SmartcareTrain | Shift Summary

Client Name: Pacifica Bowers Client ID: 1307
Clinician Name: Charla Rowe Service: Shift
Date Of Service: 04/13/2023 Start Time: 10:00 PM
Program: Inpatient PHF
Location: Inpatient Psychiatric Facility

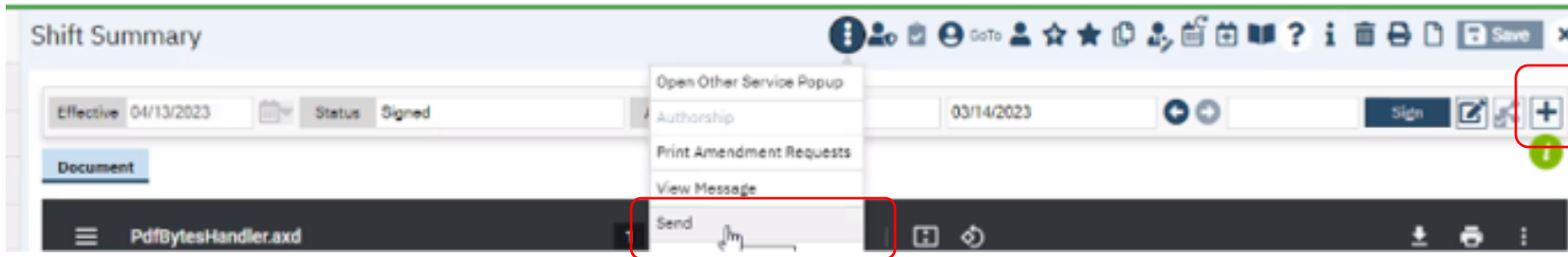
My Documents (1)

All Clients All Document Types Co-Signed Due in x days Other Apply Filter

Client	Document/Description	Group Name	Effective	Status	Ver.	Due Date	Staff to Sign	Author	Others to Sign	Associated Documents
Test, Patient (1032)	Narrative with Tx Plan (Fam...		08/23/2022	Signed	2		Staff, Psychiatri	Clinician, ...		Add

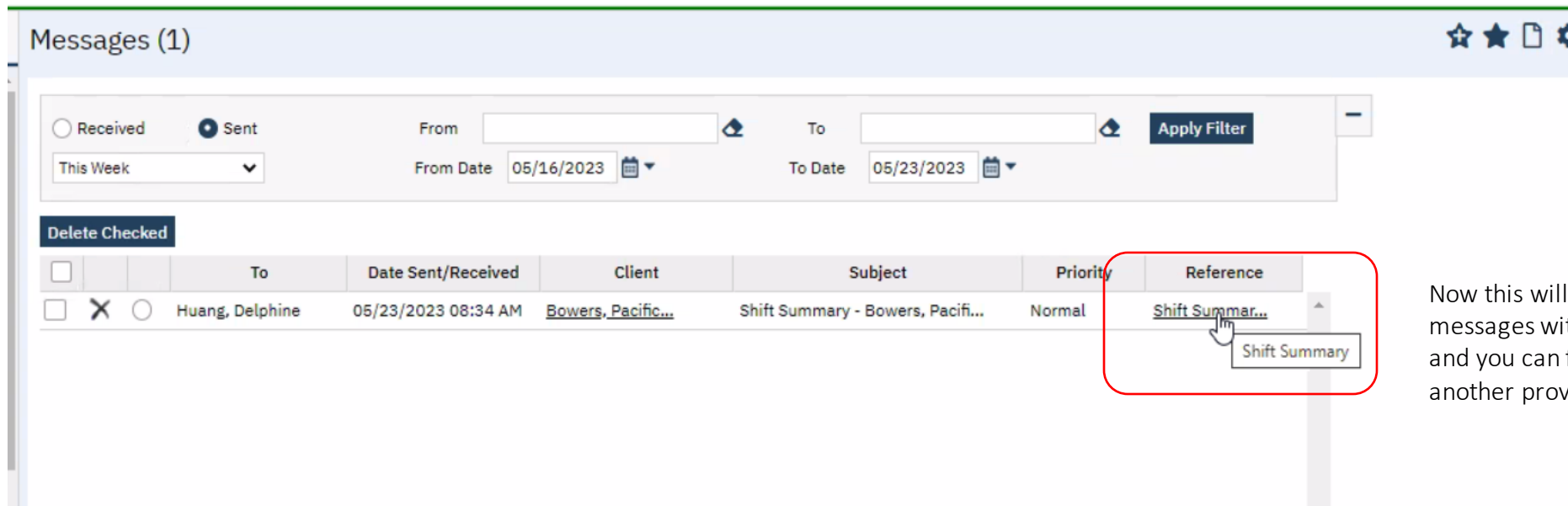
Then in documents, click on staff to sign.

ATTACHING DOCUMENTS TO MESSAGE



Click + for a signed document

drop down to "Send"



Now this will open up in messages with attachment, and you can forward to another provider.

ANSWER MESSAGE ON BEHALF OF A PRESCRIBER

If nurse is a proxy, the proxy staff does receive a copy of the message, but does not show in nurse's New Alerts & Messages widget because it is not sent to them directly.

However, can be found the "Messages" Screen and can respond. If you want psychiatrist to be notified of your respond then you will need to add your prescriber in the " To: "

Messages (3)

Received Sent

From To **Apply Filter**

This Week From Date 06/15/2023 To Date 06/22/2023

Delete Selected

<input type="checkbox"/>		Status	From	Date Sent/Received	Client	Subject	Priority	Reference
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Not Read	Kowaski, Jane	06/21/2023 09:08 AM	Davis, Matilda...	Test message	Normal	Messages
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read	Staff, Psychiatrist	06/20/2023 03:09 PM	Shrek, Donkey (...)	CBC with auto diff	Caution/Alert	Lab Results
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Read	Bowers, Sarai	06/20/2023 12:59 PM	Shrek, Donkey (...)	Message	Normal	Messages

Reply **Forward**

Details

To From Date Reference

Client Subject

I sent this to the psychiatrist

DO NOT USE ~~MEDICATION RECONCILIATION~~

The current medication reconciliation will delete any Rx if it is not checked off.

This will delete any prescriptions including other prescribers.

We will be removing this screen and will develop a med reconciliation that will remove that functionality.

For now, we recommend you go to Rx, and from there you can decide whether you will remove a particular medication and/or change the existing of which you would become the new owner of that prescription.

Medication Reconciliation

Effective 05/23/2023 Status New Author Staff, Psychiatrist 04/10/2023

General Information

Verbal CCD Other

Selecting a medication via the Checkbox will keep the medication active in the client's record. Any Medications NOT selected via the checkbox will be Discontinued in the patient's prescription list

Current Medication Select All

By checking medication below, it will be considered as current. If not checked, medication is considered as discontinued.

Prescribed Medications

	Medication	Strength	Dose	Route	Instructions	StartDate	EndDate	Prescriber
<input type="checkbox"/>	Ambien	5 mg	1.00 each	Oral	5mg, Tab, Oral 1.00 each Bedtime	02/24/2023	03/25/2023	Baize, Jacob MD Medical Doctor

REFILL REQUEST

The screenshot shows a dashboard with several widgets. A red box highlights the 'Refill/Reject Request' widget, which is currently empty. Other widgets include 'Tracking Widget', 'Verbal/Queued Orders', 'New Alert/Messages', 'Assigned Document(s)', 'Appointments For Today', and 'Lab Result'.

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

Verbal	Queued
0	3

	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

Client Name/Description	Time	Status
-------------------------	------	--------

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

REFILL REQUEST:

If you get refill requests in your current EHR, we can redirect that when we go live.

Please notify us if you need this feature.

PROCEDURE CODES

COMMON NURSE PROCEDURES

Name (Old Name) --> Planned New Name	Procedure Definition.	Note Type
Nursing Evaluation (T1001)	Documents the provision of services related to a nursing assessment/evaluation. Includes, but is not limited to, assessment of current physical and psychological needs, analysis of history/medical history, diagnosis, vitals, mental status exam, etc. 15 minutes	Progress Note
Assessment Contribution non-LPHA (H0031)	Used to document assessment work/services completed by non-clinical staff. Assessment means a service activity designed to evaluate the current status of a beneficiary's mental, emotional, or behavioral health. Assessment includes one or more of the following: mental status determination, analysis of the beneficiary's clinical history, analysis of relevant biopsychosocial and cultural issues and history, diagnosis and the use of testing procedures. 15 minutes	Progress Note
Crisis Intervention/Mobile Crisis (H2011)	A service, lasting less than 24 hours, to or on behalf of a beneficiary for a condition that requires more timely response than a regularly scheduled visit. Service activities include but are not limited to one or more of the following: assessment, collateral and therapy. Clinical providers who are providing crisis intervention should consider whether Psychotherapy for Crisis would be a more appropriate code for the service rendered. Per 15 minutes	Progress Note
Medication Training and Support (H0034)	Medication education, training and support, monitoring/discussing/reviewing side effects. Per 15 minutes. If meeting with a collateral source specifically to discuss medications being taken by the individual this service could be utilized.	Progress Note --> Narrative Note
Medication Injection (96372) <i>Of Note, this role is limited by DHCS to only RN and not LVT/PT.</i>	Utilized to document psychiatric medication intramuscular and subcutaneous injections. 15 minutes	Narrative Note (pending template development)
Oral Medication Administration/DOT (H0033)	Administration of oral medication with direct observation. 15 minutes	Progress Note --> Narrative Note
TCM/ICC (T1017)	TCM/ICC Services that assist a beneficiary to access needed medical, educational, social, prevocational, vocational, rehabilitative, or other community services. The service activities may include, but are not limited to, communication, coordination, and referral; monitoring service delivery to ensure beneficiary access to service and the service delivery system; monitoring of the beneficiary's progress; placement services; and plan development. Each 15 minutes. This is also the code utilized to capture Intensive Care Coordination (ICC) services.	Progress Note
Team Case Conference with Client/Family present (99366)	Documents medical team conference participation by a non-physician. Face to face with patient and or family present. 30 minutes or more	Progress Note --> Narrative Note
Team Case Conference with Client/Family absent (99367)	Documents medical team conference participation by a non-physician without patient and or family present. 30 minutes or more	Progress Note --> Narrative Note
Brief Contact Note (Non-billable)	Utilized to document non-billable interactions with patient, care providers and/or any patient care activities.	Narrative Note
Client Non Billable Svc Must Document (Non-billable)	Any other non-billable service that must be documented and is not better accounted for by other available non-billable procedure codes.	Narrative Note

Remember which roles has access to which procedure is determined CalAIM's reference guides by program (MH, DMC, DMC-ODS) and by allowable role. For complete lists, please click [here](#).

- This short list is based on RN role documentation that is permitted by DHCS/CalAIM, but not necessary LVN/PT.
- Please check SUD nurse codes, as there may be more access to other procedures than listed here.
- "Red" highlight is new changes or soon-to-be changed.