

CaIMHSA

California Mental Health Services Authority

OUTPATIENT PRESCRIBER

VISUAL CHEATSHEET WALKTHROUGH

07.07.23

UPDATES

Date	Update	Page #
07.07.23	Note to Pharmacist steps are clarified and preview to pharmacy	25-26

GOALS

This is a visualization of the Outpatient Prescriber's cheatsheets + Medication Management Rx

- Aims to guide user through commonly used tasks. Please refer to our user guides on <https://2023.calmhsa.org/> for more detail, especially Inpatient/SU
- Assumption that user has completed basic training found on CaMHSA website.
- **Reminder:** Ensure your Prescriber data (eg NPI, DEA etc is correctly inputted) + correct user/staffrole setup.

Outpatient Prescriber 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 "Appointments for Today" widget on Provider's Dashboard	Save Staff Calendar as a quick link to easily access schedule
2 Send/Review Messages From Other Providers	Messages/Alerts or "New Alerts & Messages" widget on Provider's Dashboard	Providers can view and link to any new messages from other providers. Can also search for messages/alerts under Message/Alert screen. Can attach a document by going to a signed document PDF and sending it as part of a message.
3 Look Up Client	Type into the "Person Search" icon	With Person Search icon, type the first 3 letters of last name and/or their medical record number and it will autofill. 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 Documents screen by "Signed." If within a note's PDF, use forward or backward arrow to look at notes.
5 Review Previous and Current Programs	Programs (Client)	Filter "enrolled" for current programs and remove date range to see all current enrollments.
6 Review Labs	Lab Result Widget on client/provider dashboard: A quick view of labs Lab Result Review Screen: Complete list of client labs and/or outside lab results that have an appropriate interface with the EHR	Through Client Orders, choose "Review" tab for nurses to see point of care labs results here, as well as scanned documents
7 Review Diagnoses	Diagnosis Document (Client) or within psych note under "Diagnosis" tab	Of note, when clinicians enter problems in their notes, this information will go into "Client Clinical Problems," a separate list from Diagnosis Document.
8 Review/Document Vitals	Flow sheet (Client) Screen and choose Vitals dropdown or within psych note, click "Exam" tab	Using a flow sheet allows you to view recorded data in graph format to track trends.

CaMHSA.org Updated 6/2023 **CaMHSA**

Outpatient Prescriber Workflow, continued

Thing You Want to Do	What is It Called?	* Pro Tip
9 Start a EAM Psych Note	Services/Notes (Client), Staff Calendar and/or Appointment for Today widget on Provider's Dashboard. In Service tab, change "Scheduled" to "Show."	Commonly Used Procedures: 90702-Assessment MD: Used for formal psychiatric evaluation, including integrated biopsychosocial and medical assessment 99020-99205-Medication Support New Client: Used to document E/M medication support services provided to new patients and/or > 3 years since last visit 99202-99215-Medication Support Existing Client: Used to document E/M medication support services provided to established patients, if visits within 3 years. 99202-99205 and 99212-99215 are the time-based codes used to document "standard" outpatient psychiatric visits. Choose based on time spent and if patient is new vs. established. These CPT codes use the same psych note template, so previous data will be saved from last use.
10 Document Diagnoses Within a Service/Note	Within Note: "Diagnosis" Tab and/or Billing Diagnosis	Enter descriptive text or an ICD-10 code and it will autofill. You will need to designate one primary diagnosis for the service and place it as the #1 spot of order.
11 Problem List Within Notes	Within Note: "MDM" Tab	CaMHSA will be developing a different one in the future. 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.
12 Order Labs	Client Quick Orders or Within Psych Note: "MDM" Tab	
13 Order Outpatient Medications	Medication Management (Rx) (Client) and/or Within Psych Note, MDM tab: Medications "SmartCare Rx"	If prescribing controlled substances, download Identrust's HID mobile app and have a staff signature on file (Your Profile -> My preferences). Rx is also where you can sign any queued medication orders. Save as a quick link for easy access.
14 Calculate Time for Visit	Within Psych Note, "MDM" Tab: Activities Completed	Can enter different time than was scheduled under "Service" tab. This is the official time that will be used for billing purposes.
15 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.
16 Co-sign Notes	Click on "Co-sign" Within the Assigned Documents widget on Providers Dashboard	You can also search for "batch signature" to sign multiple documents at once.
17 Assessments: PHQ-9 and GAD-7, AIMS	Search PHQ-9 and GAD-7. For AIMS Assessment, see Tab within Psychiatric Note Titled "AIMS"	Within Client Quick Links -> Assessment/Screening Tools to find full list of other available tools
18 Reconcile 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"
19 Record Allergies	Medication Management (Rx) (Client) -> Allergies/Intolerance/Failed Trials	This will autopopulate your note if done prior. Refresh to load into your notes.

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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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EHR ESSENTIALS CHEATSHEET

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.

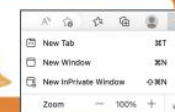


The **Unsaved Changes** icon will display a list of screens that you made changes to but navigated away from before saving.



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.



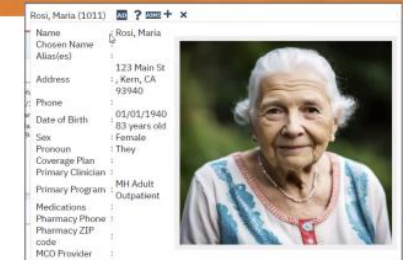
The **Help** icon will take you to CalMHSA's Training Tools page. This has user guides and helpful videos.



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.



Client information

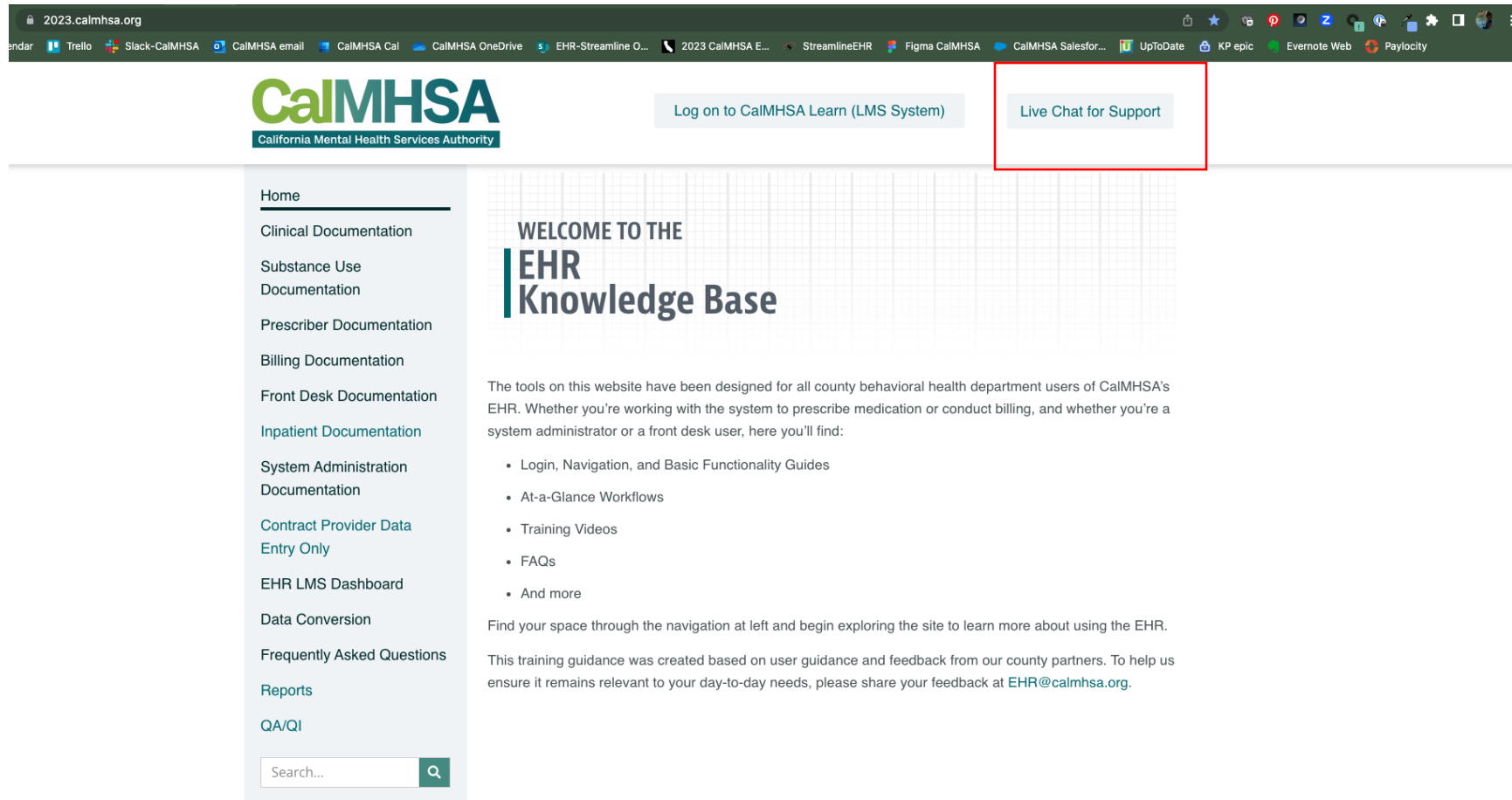
When you hover over the client's name, a window will pop up with the most important information about the person you're serving.

Notes:

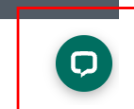
- You can filter **List Page** data in many different ways. This will make it easy to review relevant data very quickly.
- Anything with **underlined text** is hyperlinked and will help you easily navigate in SmartCare.
- Scan the QR code** for up-to-date training tips and instructional videos.



HELP IS AVAILABLE AT CALMHSA WEBSITE [\(2023.calmhsa.org\)](https://2023.calmhsa.org)



The screenshot shows the CalMHSA website interface. At the top, there is a navigation bar with the CalMHSA logo on the left and two buttons: "Log on to CalMHSA Learn (LMS System)" and "Live Chat for Support". The "Live Chat for Support" button is highlighted with a red rectangular box. Below the navigation bar is a sidebar menu with the following items: 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, and QA/QI. A search bar is located at the bottom of the sidebar. The main content area features a large heading "WELCOME TO THE EHR Knowledge Base" and a list of resources: Login, Navigation, and Basic Functionality Guides; At-a-Glance Workflows; Training Videos; FAQs; and And more. Below this list, there is a paragraph of text: "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:" followed by the list of resources. Another paragraph states: "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."



WIDGETS: PSYCHIATRIST DASHBOARD

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

Widgets editor:

Still editable to move or remove if not needed by individual

WIDGETS: CLIENT DASHBOARD

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

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

Treatment Team All 🔄

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

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

Most Recent Lab(0) All 🔄

No data to display

Immunizations All 🔄

Immunizations Name	Date/Time Immunizations	Immunizations Status
No Information		

HISTORICAL CLIENT DATA

Outpatient Prescriber Workflow



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2 Send/Review Messages From Other Providers	Messages/Alerts or "New Alerts & Messages" widget on Provider's Dashboard	Providers can view and link to any new messages from other providers. Can also search for messages/alerts under Message/Alert screen. Can attach a document by going to a signed document PDF and sending it as part of a message.
3 Look Up Client	Type into the "Person Search" icon	With Person Search icon, type the first 3 letters of last name and/or their medical record number and it will autofilter. 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 Documents screen by "Signed." If within a note's PDF, use forward or backward arrow to look at notes.
5 Review Previous and Current Programs	Programs (Client)	Filter "enrolled" for current programs and remove date range to see all current enrollments.
6 Review Labs	Lab Result Widget on client/provider dashboard: A quick view of labs Lab Result Review Screen: Complete list of client labs and/or outside lab results that have an appropriate interface with the EHR	Through Client Orders, choose "Review" tab for nurses to see point of care labs results here, as well as scanned documents
7 Review Diagnoses	Diagnosis Document (Client) or within psych note under "Diagnosis" tab	Of note, when clinicians enter problems in their notes, this information will go into "Client Clinical Problems," a separate list from Diagnosis Document.
8 Review/Document Vitals	Flow sheet (Client) Screen and choose Vitals dropdown or within psych note, click "Exam" tab	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 Documents screen by "Signed." If within a note's PDF, use forward or backward arrow to look at notes.

5 Review Previous and Current Programs

Programs (Client)

Filter "enrolled" for current programs and remove date range to see all current enrollments.

6 Review Labs

Lab Result Widget on client/provider dashboard: A quick view of labs

Through Client Orders, choose "Review" tab for nurses to see point of care labs results here, as well as scanned documents

Lab Result Review Screen: Complete list of client labs and/or outside lab results that have an appropriate interface with the EHR

7 Review Diagnoses

Diagnosis Document (Client) or within psych note under "Diagnosis" tab

Of note, when clinicians enter problems in their notes, this information will go into "Client Clinical Problems," a separate list from Diagnosis Document.

8 Review/Document Vitals

Flow sheet (Client) Screen and choose Vitals dropdown or within psych note, click "Exam" tab

Using a flow sheet allows you to view recorded data in graph format to track trends.

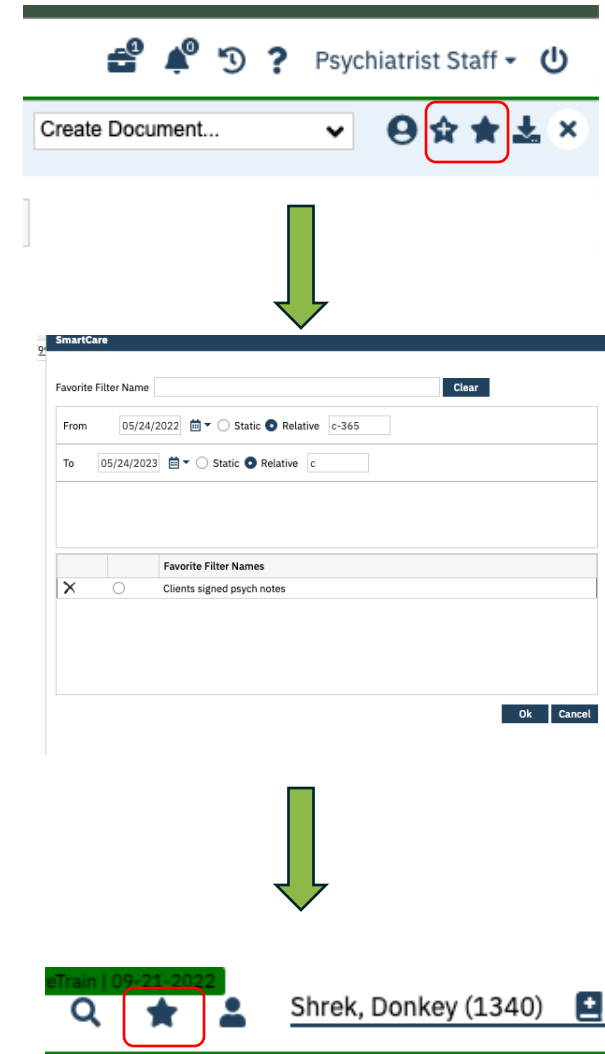
"FAVORITES" SETUP FOR PRESCRIBERS

Recommended Favorites with suggested titles + filters for efficient doctor's 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: Type Lab, Results Obtained: this will alert you to new lab results that have not yet been reviewed.
- Orders, Office: Type Lab, Completed, Your Name: this will alert you to new lab results that have been assigned to you.

To review common client historical data:

- Client Enrolled Programs : [Client], Program, Enrolled
- 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 **



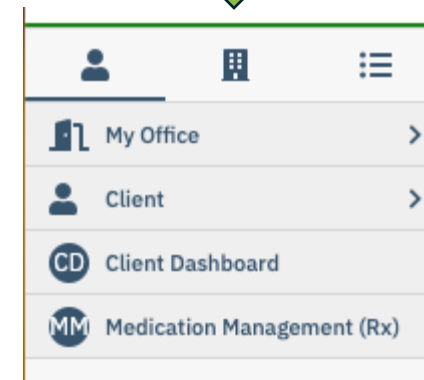
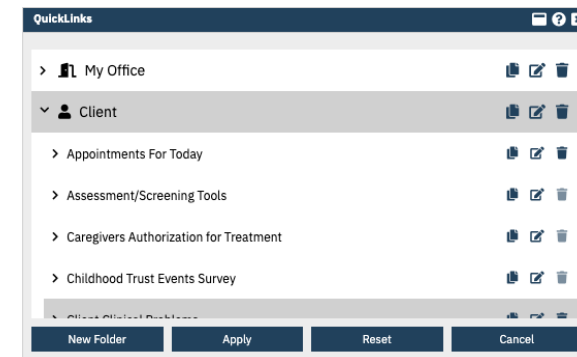
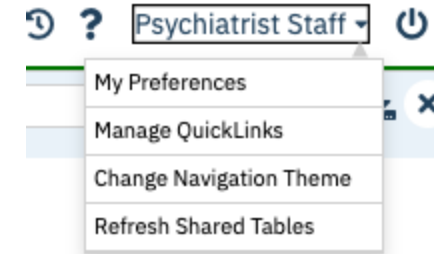
"QUICKLINKS" SETUP FOR PRESCRIBERS

Recommended QuickLink Favorites:

- Staff Calendar

Client Related QuickLinks:

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

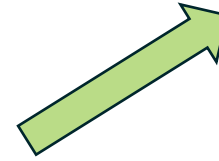


Scroll, select, copy, drag to where you want it show up on your quicklist

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.



SmartView

Most Recent Lab

No data to display

BMI

BMI : 28.69 Weight : 200.00

Vitals

	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

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

Medications

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

REVIEW LABS

Within Lab Result Widget:

Can search for other providers' and what labs have resulted

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.

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.

Lab Results Review

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

Reviewed
Nurse Reviewed

Normal
 Abnormal
 Not Specified

Results Review Comment

Comments

Assigned to

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 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.

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						

**UPDATED PROCEDURES DESCRIPTIONS

Outpatient Prescriber Workflow, continued

Thing You Want to Do	What is It Called?	Pro Tip
9 Start a E&M Psych Note	Services/Notes [Client], Staff Calendar and/or Appointment for Today widget on Provider's Dashboard. In Service tab, change "Scheduled" to "Show."	<p>Commonly Used Procedures:</p> <p>90792-Assessment MD: Used for formal psychiatric evaluation, including integrated biopsychosocial and medical assessment</p> <p>99202-99205-Medication Support New Client: Used to document E/M medication support services provided to new patients and/or > 3 years since last visit</p> <p>99212-99215-Medication Support Existing Client: Used to document E/M medication support services provided to established patients, if visits within 3 years.</p> <p>99202-99205 and 99212-99215 are the time-based codes used to document "standard" outpatient psychiatric visits. Choose based on time spent and if patient is new vs. established. These CPT codes use the same psych note template, so previous data will be saved from last use.</p>
10 Document Diagnoses Within a Service/Note	Within Note: "Diagnosis" Tab and/or Billing Diagnosis	Enter descriptive text or an ICD-10 code and it will autofilter. You will need to designate one primary diagnosis for the service and place it as the #1 spot of order.
11 Problem List Within Notes	Within Note: "MDM" Tab	CalMHSA will be developing a different one in the future. 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.
12 Order Labs	Client Quick Orders or Within Psych Note: "MDM" Tab	
13 Order Outpatient Medications	Medication Management (Rx) (Client) and/or Within Psych Note, MDM tab: Medications "SmartCare RX"	If prescribing controlled substances, download Identrust's HID mobile app and have a staff signature on file (Your Profile --> My preferences). Rx is also where you can sign any queued medication orders. Save as a quick link for easy access.
14 Calculate Time for Visit	Within Psych Note, "MDM" Tab: Activities Completed	Can enter different time than was scheduled under "Service" tab. This is the official time that will be used for billing purposes.
15 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.
16 Co-sign Notes	Click on "Co-sign" Within the Assigned Documents Widget on Providers Dashboard	You can also search for "batch signature" to sign multiple documents at once.
17 Assessments: PHQ-9 and GAD-7, AIMS	Search PHQ-9 and GAD-7. For AIMS Assessment, see Tab within Psychiatric Note Titled "AIMS"	Within Client Quick Links --> Assessment/Screening Tools to find full list of other available tools
18 Reconcile 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"
19 Record Allergies	Medication Management (Rx) (Client) --> Allergies/ Intolerance/Failed Trials	This will autopopulate your note if done prior. Refresh to load into your note.

9

Start a E&M Psych Note

Services/Notes [Client], Staff Calendar and/or Appointment for Today widget on Provider's Dashboard. In Service tab, change "Scheduled" to "Show."

Commonly Used Procedures:

90792-Assessment MD: Used for formal psychiatric evaluation, including integrated biopsychosocial and medical assessment

99202-99205-Medication Support New Client: Used to document E/M medication support services provided to new patients and/or > 3 years since last visit

99212-99215-Medication Support Existing Client: Used to document E/M medication support services provided to established patients, if visits within 3 years.

99202-99205 and 99212-99215 are the time-based codes used to document "standard" outpatient psychiatric visits. Choose based on time spent and if patient is new vs. established. These CPT codes use the same psych note template, so previous data will be saved from last use.

WHEN TO USE WHICH PROCEDURE

Updated Name (Old Name)	Procedure Definition. + CPT	Note Type
Assessment MD (Psychiatric Diagnostic Evaluation with Medical Services)	Psychiatric diagnostic evaluation with medical services is an integrated biopsychosocial and medical assessment "Psychiatric Evaluation" services. 90792: 15 minutes.	Psychiatric Note
Medication Support New Client (Office or Other Outpatient Visit of New Patient)	Standard psychiatry services for new patients. 99202: 15-29 minutes, 99203: 30-44 minutes, 99204: 45-59 minutes, 99205: 60-74 minutes	Psychiatric Note
Medication Support Existing Client (Office or Other Outpatient Visit of an Established Patient)	Standard psychiatry services for established patients. 99212: 10-19 minutes, 99213: 20-29 minutes, 99214: 30-39 minutes, 99215: 40-54 minutes	Psychiatric Note
Medication Support Telephone (Telephone Evaluation and Management Service)	Evaluation & Management services provided by telephone. 99441: 5-10 minutes, 99442: 11-20 minutes, 99443: 21-30 minutes.	Psychiatric 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](#).

OTHER COMMON MD/DO PROCEDURES

Name (Old Name) --> New Name	Procedure Definition. + CPT	Note Type
Physician Consultation (99451)	Consultative physician inter-professional assessment (telephone/internet or electronic). 5-15 minutes	Progress Note-- > Narrative Note
Evaluation and Management --> Consults for New and Established Patients (99242-99245)	The provider sees a patient for an office or other outpatient consultation involving evaluation and management (E/M)These are specific to office or other outpatient consultations. Generally provided at request of another physician. These are NOT your standard E/M visits.	Psychiatric Note
Consult (Nonbillable) --> Consults to External Providers (Nonbillable)	Consults with physical health care providers, primary care providers or other relevant healthcare providers.	Narrative Note
Review of Hospital Records (90085)	Review of records for psychiatric evaluation without direct patient contact. This may be accomplished at the request of an agency or peer review organization. 15 minutes. <i>It appears that DHCS' stance is that in order for this code to be used, it needs to influence the diagnosis decision-making. If it does not impact the diagnosis, then use other codes and/or Brief Contact Note (Nonbillable) / Client Non Billable Srvc Must Document</i>	Narrative Note
Medication Training and Support (H0034)	Medication education, training and support, monitoring/discussing/reviewing side effects. Per 15 minutes H0034 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)	Utilized to document psychiatric medication intramuscular injections. 15 minutes	Narrative Note (pending template development)
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
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
Medical Team Conference, Participation by Physician. Pt and/or Family not present (99367)	Medical team conference with interdisciplinary team of health care professionals. Participation by physician. Patient and or family not present. 30 minutes or more	Progress Note-- Narrative Note
Care Management Services for Behavioral Health Conditions by Physician (99484)	Care management services for behavioral health conditions, at least 20 minutes of clinical staff time, directed by a physician or other qualified health care professional, per calendar month, with the following required elements: *Initial assessment or follow-up monitoring, including the use of applicable validated rating scales, *Behavioral health care planning in relation to behavioral/psychiatric health problems, including revision for patients who are not progressing or whose status changes, *Facilitating and coordinating treatment such as psychotherapy, pharmacotherapy, counseling and/or psychiatric consultation and *Continuity of care with a designated member of the care team.	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 Srvc 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

PSYCH NOTE: DIAGNOSIS

Service Note **Billing Diagnosis** Add-On Codes Warnings Disposition

Billing Diagnosis

1 F32.A - Depression, unspecified

2 F90.9 - Unspecified attention-deficit/hyperactivity disorder

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

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

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

Can shift order here.

Create favorites for common diagnoses

General Exam Medical Decision Making AIMS **Diagnosis**

No Diagnosis

Diagnosis

★

* Code Search Description Search

Rule Out Type Specifier

Severity Source

Remission Order Billable Yes No

Comments

Diagnosis List

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

Outpatient Prescriber Workflow



Sheet 2

Thing You Want to Do	What is It Called?	* Pro Tip
9 Start a E&M Psych Note	Services/Notes (Client), Staff Calendar and/or "Appointments for Today" Widget on Provider's Dashboard	Switch the Service tab from "Scheduled" to "Show" Formal 1st assessment : 90792 - Assessment MD. 1st visit after initial assessment: 99205 - Medication Support New Client Subsequent visits: 99212-99215 - Medication Support Existing Client
10 Document Diagnoses Within a Service/Note	Within Note: "Diagnosis" Tab and/or Billing Diagnosis	Enter descriptive text or an ICD-10 code and it will autofilter. You will need to designate one primary diagnosis for the service and place it as the #1 spot of order.
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19 Record Allergies	Medication Management (Rx) (Client) --> Allergies/ Intolerance/Failed Trials	This will autopopulate your note if done prior. Refresh to load into your note.

Thing You Want to Do	What is It Called?	* Pro Tip
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PYSCH NOTE: PROBLEMS

Please note that the Problem List is under development, but for now you need to enter at minimum 1 problem. 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.

Service	Note	Billing Diagnosis	Add-On Codes	Warnings	Disposition
General	Exam	Medical Decision Making	AIMS	Diagnosis	

X Problem 1

Problem.... Depression, unspecified

Complexity of Problem: Chronic illnesses with exacerbation, progression, or side effects of treatment

Associated signs/systems; other information: moments of tearing when talking about being a caregiver for mom. hard to hold job because feels constantly exhausted

[Add Problem](#)

CLIENT CLINICAL PROBLEMS VS DIAGNOSIS

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

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 homeless...	1136132023	Z59.811	06/19/2023	06/19/2023

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
X	Housing instability due to imminent ris...	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

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.

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](#)

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

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

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

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
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Ritalin	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
To take before work	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
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	Naprosyn	05/23/2023	500mg, Tab, Oral 1 each Twice a day 60.00	05/23/2023	06/21/2023	3 1	Clinic			Staff, Psychiatrist
Order Queued for Prescriber Approval	Zoloft	05/22/2023	25mg, Tab, Oral 1 each Daily 30.00	05/22/2023	06/20/2023	3	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

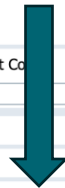
New Medication Order

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

Prescribe Queue Order X

Patient instruction go here

You can save templates for future, faster use



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

Order

Send Directly to Pharmacy

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

Printer: <Manual Selection>

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	1			06/22/2023
X	f										

More Steps

Medication List Formulary

Insert Clear

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

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.

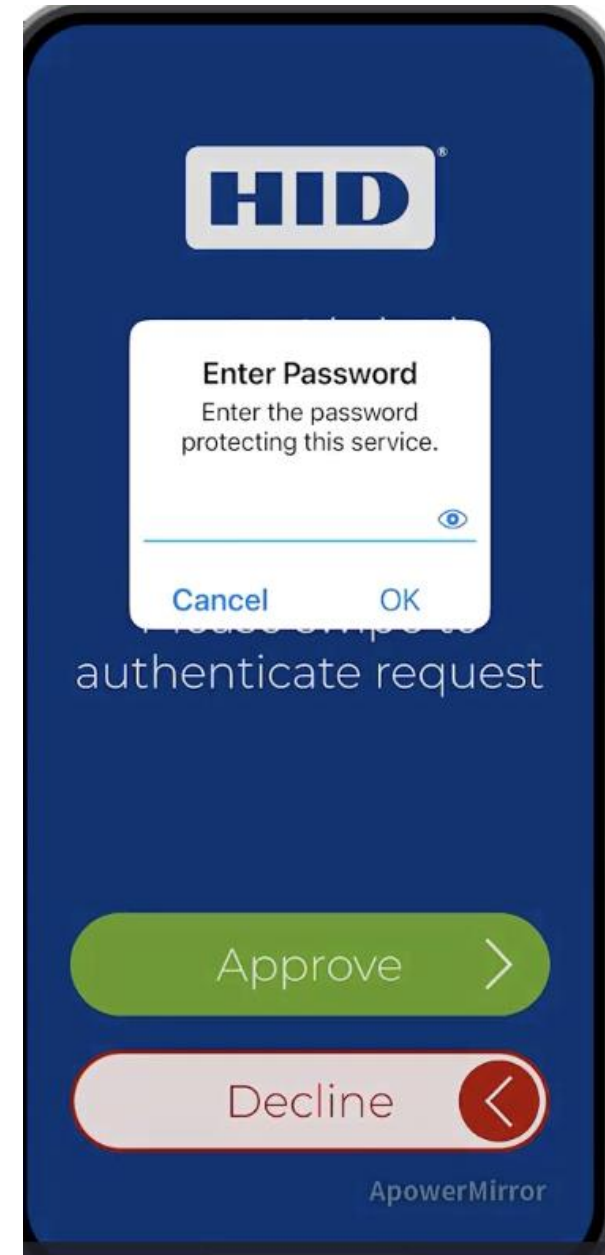
This is a three-step process that will require the prescriber to:

- 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 IdeaTrust. Consideration should be given as to which computer should be used for this step. Backing up of these certificates is important.

<u>Ready to Sign</u>	<u>Medication</u>	<u>Directions</u>
<input type="checkbox"/>	Adderall XR 10 mg capsule, extended release	1.00 (each) Morning
<input type="checkbox"/>	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 prescription(s) and authorizing

Must click the checkboxes to finalize order



RX: VERBAL OR QUEUED ORDERS

Verbal/Queued Orders	
Verbal	2
Queued	1

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



Can either approve vs change order

© Streamline Healthcare Solutions | SmartCareRx

Order Approval for Staff, Psychiatrist MD Medical Doctor

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

Approve All Order

Order Details

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

Height: 70 in Weight: 200 lb Prescribing Location: Office

Print Fax Electronic Pharmacy : Test Pharmacy

Adjust Dosage/Schedule Void Approve Order

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: 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

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

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

Patent 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

X 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

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

Thing You Want to Do	What is It Called?	* Pro Tip
9 Start a E&M Psych Note	Services/Notes (Client), Staff Calendar and/or Appointment for Today widget on Provider's Dashboard. In Service tab, change "Scheduled" to "Show."	Commonly Used Procedures: 90792-Assessment MD: Used for formal psychiatric evaluation, including integrated biopsychosocial and medical assessment 99202-99205-Medication Support New Client: Used to document E/M medication support services provided to new patients and/or > 3 years since last visit. 99212-99215-Medication Support Existing Client: Used to document E/M medication support services provided to established patients, if visits within 3 years. 99202-99205 and 99212-99215 are the time-based codes used to document "standard" outpatient psychiatric visits. Choose based on time spent and if patient is new vs. established. These CPT codes use the same psych note template, so previous data will be saved from last use.
10 Document Diagnoses Within a Service/Note	Within Note: "Diagnosis" Tab and/or Billing Diagnosis	Enter descriptive text or an ICD-10 code and it will autofilter. You will need to designate one primary diagnosis for the service and place it as the #1 spot of order.
11 Problem List Within Notes	Within Note: "MDM" Tab	CalMHSA will be developing a different one in the future. 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.
12 Order Labs	Client Quick Orders or Within Psych Note: "MDM" Tab	
13 Order Outpatient Medications	Medication Management (Rx) (Client) and/or Within Psych Note, MDM tab: Medications "SmartCare RX"	If prescribing controlled substances, download Identrust's HD mobile app and have a staff signature on file (Your Profile -> My preferences). Rx is also where you can sign any queued medication orders. Save as a quick link for easy access.
14 Calculate Time for Visit	Within Psych Note, "MDM" Tab: Activities Completed	Can enter different time than was scheduled under "Service" tab. This is the official time that will be used for billing purposes.
15 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.
16 Co-sign Notes	Click on "Co-sign" Within the Assigned Documents Widget on Providers Dashboard	You can also search for "batch signature" to sign multiple documents at once.
17 Assessments: PHQ-9 and GAD-7, AIMS	Search PHQ-9 and GAD-7. For AIMS Assessment, see Tab within Psychiatric Note Titled "AIMS"	Within Client Quick Links --> Assessment/Screening Tools to find full list of other available tools
18 Reconcile 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"
19 Record Allergies	Medication Management (Rx) (Client) --> Allergies/ Intolerance/Failed Trials	This will autopopulate your note if done prior. Refresh to load into your note.

Thing You Want to Do	What is It Called?	* Pro Tip
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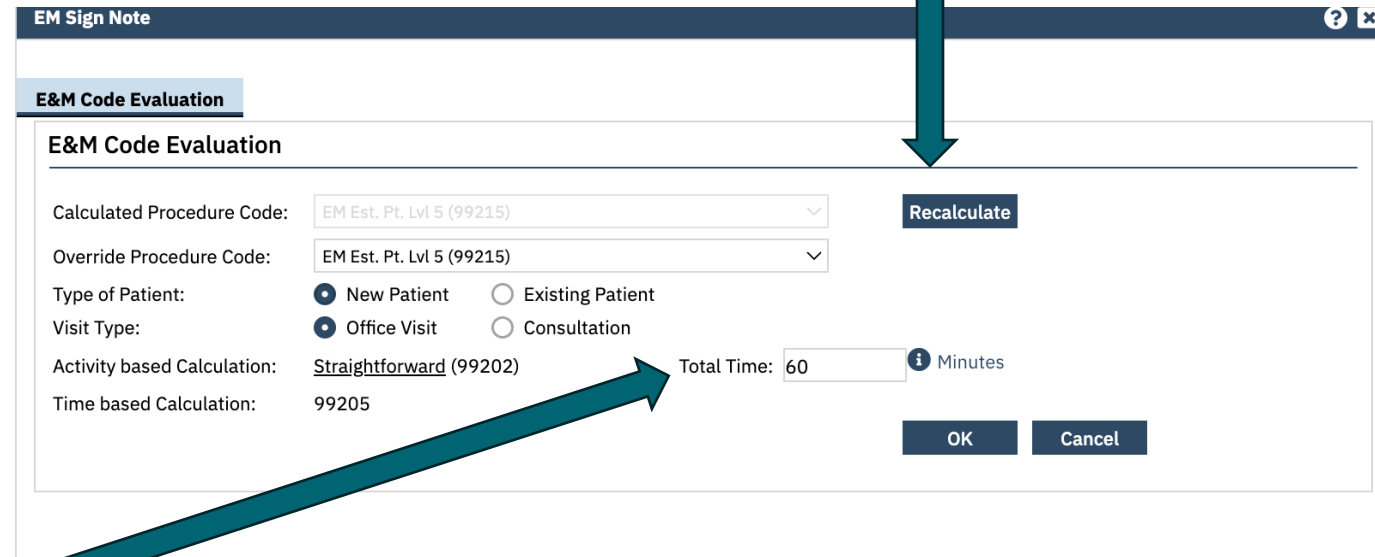
FIXING TIME SPENT

General Exam **Medical Decision Making** AIMS Diagnosis

Total time spent on encounter Minutes

If you change the time here it will not impact the "service" tab's face-to-face time but it will update at the E&M code evaluation for billing.

To recalculate the procedure code



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

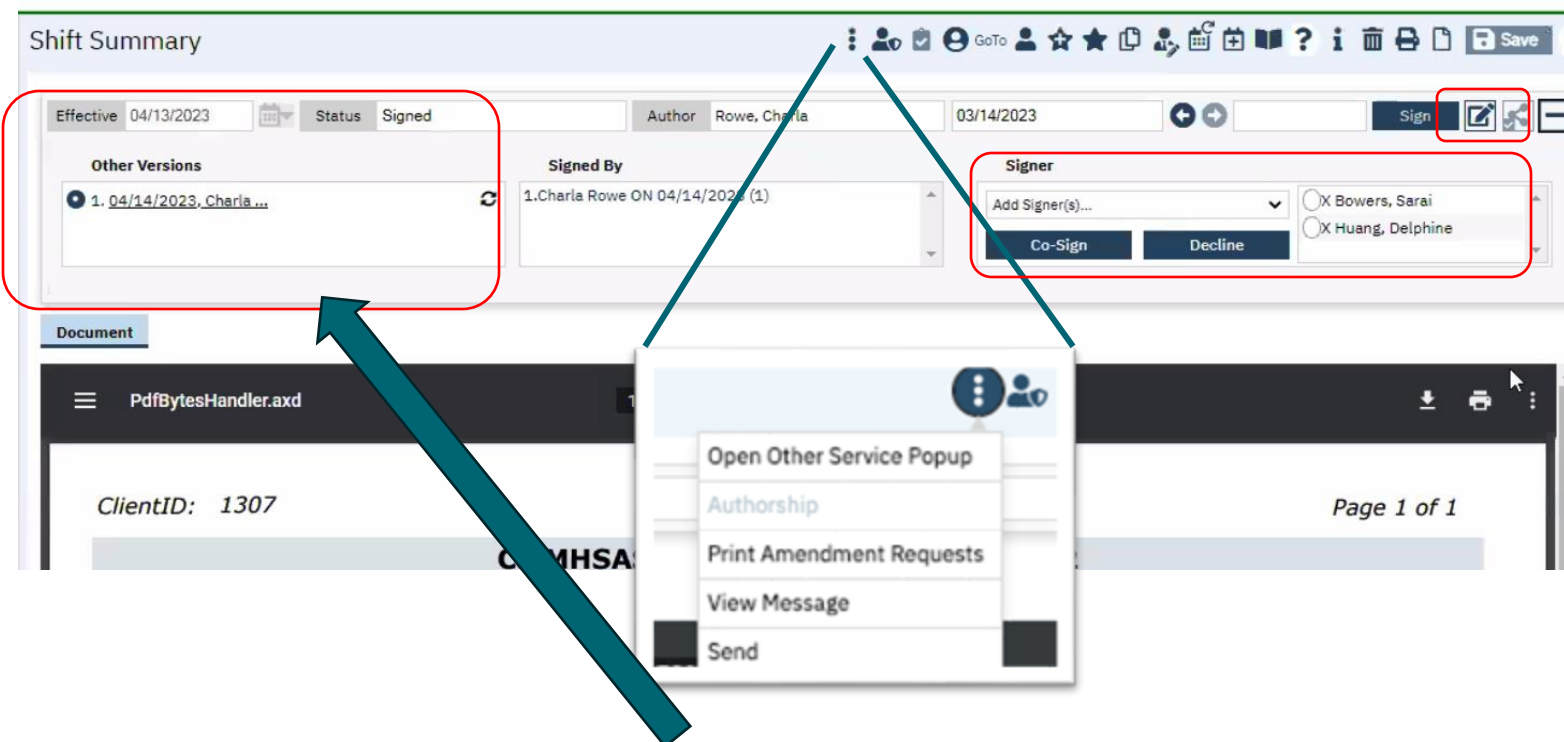
Supervisees
List of Supervisees of this staff. [Add Staff...](#)

If attendings will be doctor for billing, admin can set up residents/NPs to be proxy for the doctor. Resident "Save" the note, instead of Sign.

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



Original owner can edit the note.

To assign a co-signer

If there are edits after 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]

"Create Note" Template: Much easier to build as a short term solution

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	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

SIGNING COSIGN NOTES

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

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

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 Smartcare Train | 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

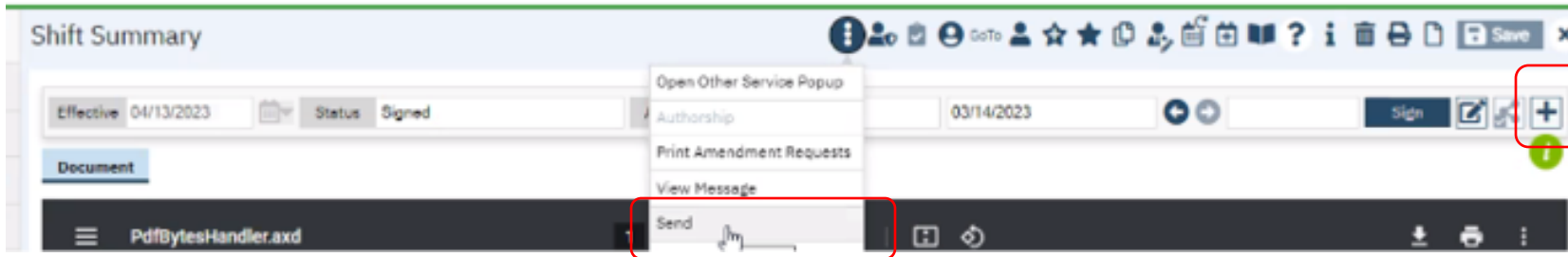
My Documents (1)

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, Psychiatr...	Clinician, ...		Add

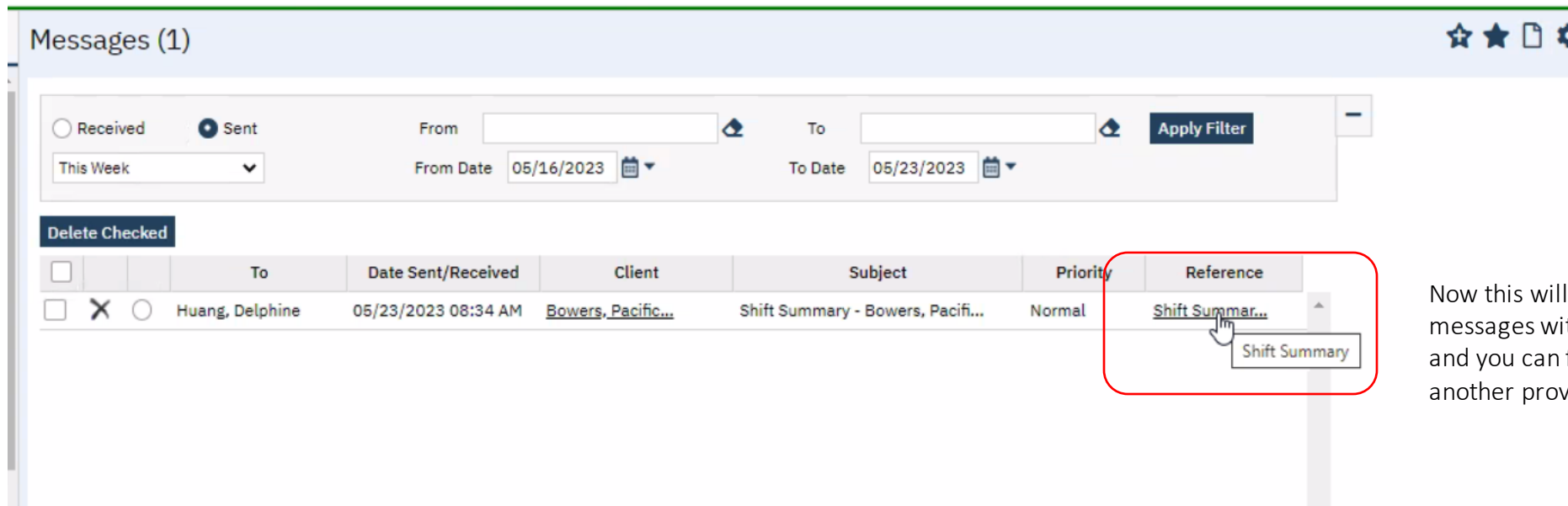
Then in documents, click on staff to sign.

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.

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

Open Rx Refresh

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.

Admin/IT will need to notify CalMHSA for set up post go-live.

SUPPLEMENT REFERENCES

Outpatient prescriber resources:

- [CalMHSA Prescriber website](#)
- **05/23/23 video:** Train the Trainer: Outpatient Prescriber: recording [link](#) ; Passcode: rSW^Kpu7 . Deck was sent out post–presentation, please ask your county point person.