CalMHSA

California Mental Health Services Authority

SmartCare Reporting User Guide

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About this User Manual

This user manual is designed to provide a how-to guide of the features and functionality of SmartCare. It will outline how to complete each workflow in a step-by-step format with related screenshots that will make understanding how to complete each workflow easy. Through this guide, you will learn about SmartCare's comprehensive suite of tools and advanced technologies to enter client data securely and efficiently.

We hope that by following these instructions you will gain a better understanding of the capabilities of SmartCare so that you can start using the system right way with confidence.

Audience

This manual is intended for use by anyone who will use the SmartCare EHR to support Specialty Mental Health Services or Substance Use Disorder clinical documentation.

Computer Literacy Assumptions for Understanding this User Manual

- Ability to perform basic word processing such as typing and searching for documents in files
- Understands data entry techniques into electronic forms and documents
- Familiarity with running a windows operating system or other popular programs like Mac OS.
- Basic knowledge of data bases and their structure
- Basic knowledge of how to use internet browsers like Microsoft Edge and Google Chrome

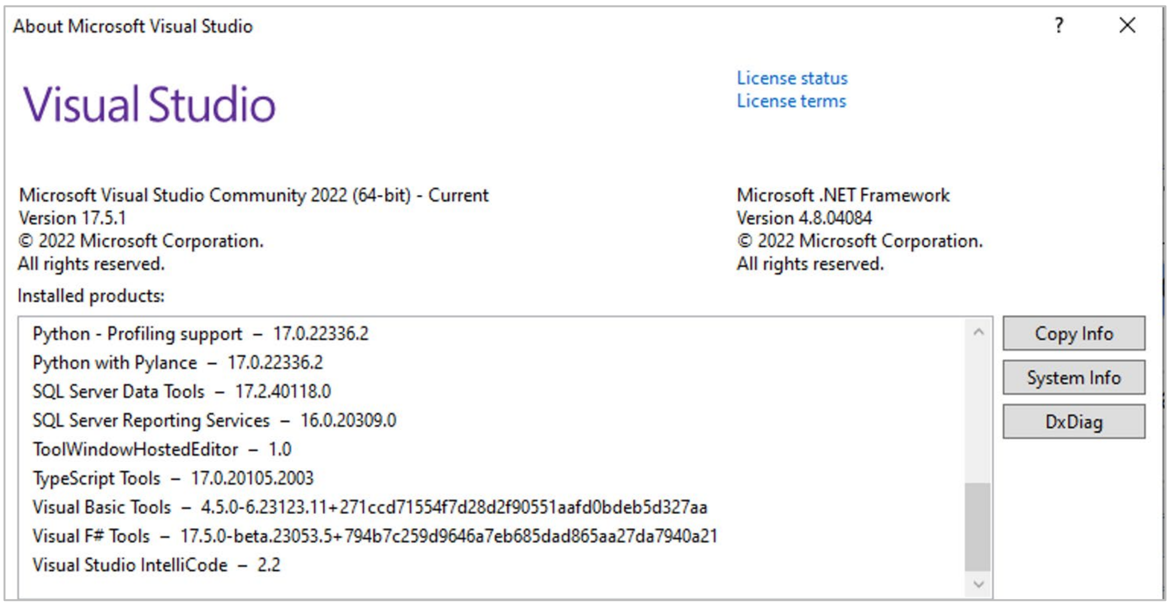
Note: Before beginning to use the same system, make sure you have a compatible internet browser like Microsoft Edge and Google Chrome. CalMHSA recommends Google Chrome for best user experience.

Reporting in SmartCare

Prior to creating reports in SmartCare, some perquisite steps and software will be required by the end user.

Prerequisite Steps and Software Needed

1. Get SQL server user account and password from Streamline
    a. The SQL server user account will be read only and is NOT the same as your SmartCare user account
2. Install OpenVPNGUI software on your laptop or have IPSEC set up for your county to establish connection to the SmartCare databases
3. Install **MS Visual Studio (plus plug in)** or alternatively install MS Report Builder



4. The MS Visual Studio plug in can be downloaded here:

    https://marketplace.visualstudio.com/items?itemName=ProBITools.MicrosoftReportProjectsforVisualStudio2022

5. MS Report Builder can be downloaded here:

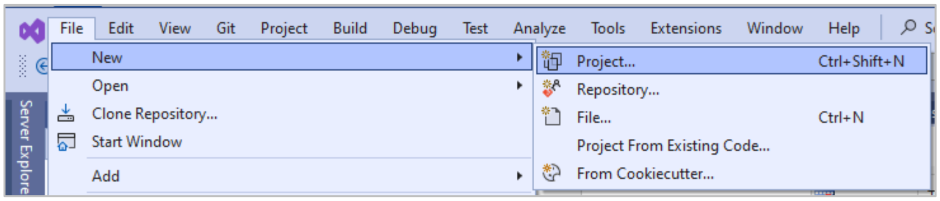
    https://www.microsoft.com/en-us/download/details.aspx?id=53613

6. Install MS SQL Server Mgmt Studio (SSMS)

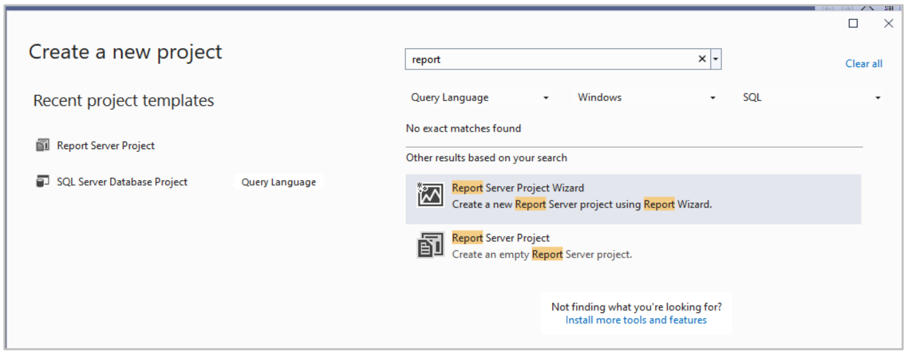
How to Create a New Report

To create a new report in Visual Studio, you must set up a new project as a first step. If you are using MS Report Builder, this step is not necessary. Follow the steps below to start the process:

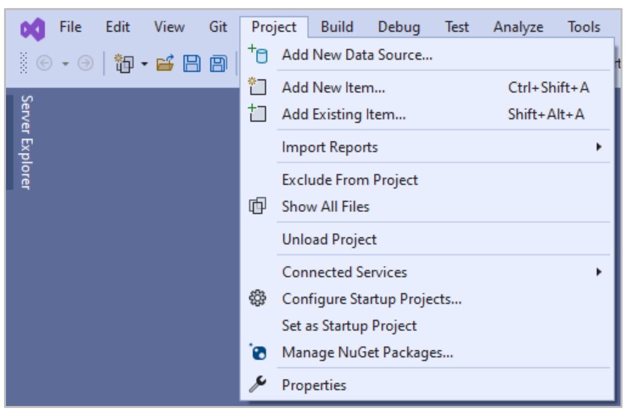
1. Open Visual Studio, click **File** and choose **New** and then select **Project**



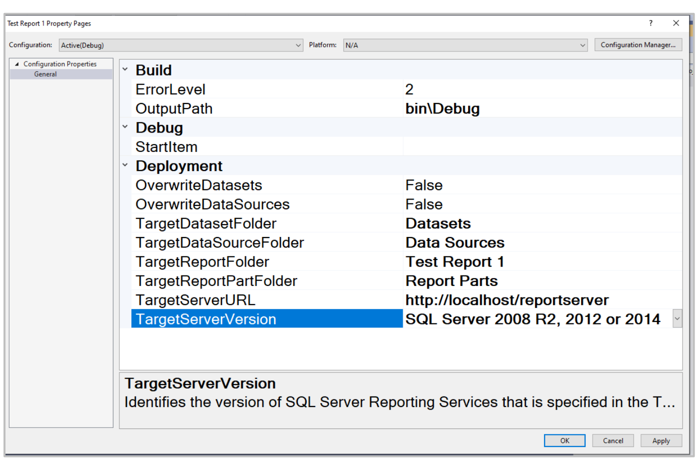
2. Enter report within search window to display selections and choose **Report Server Project**



3. There will be a need for a one-time modification of **Properties** to set the Target Server Version

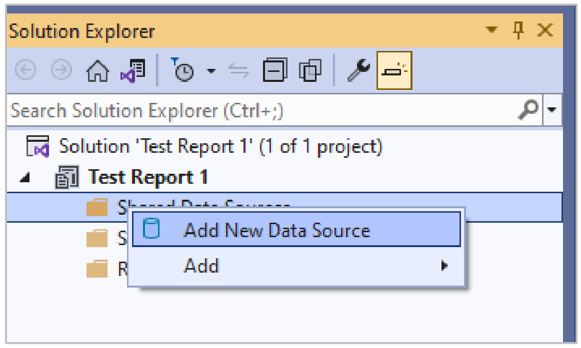


4. Set the **TargetServerVersion** to **SQL Server 2008 R2, 2012 or 2014**

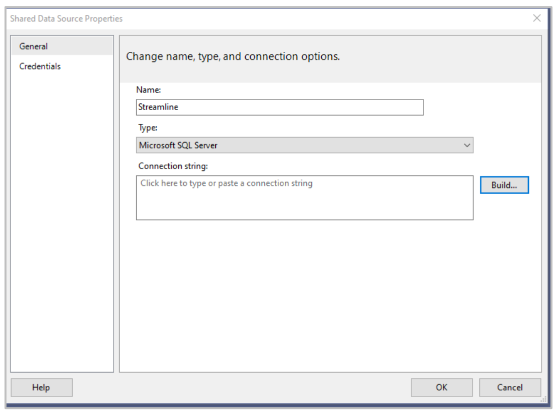


How to Set up a Shared Data Source

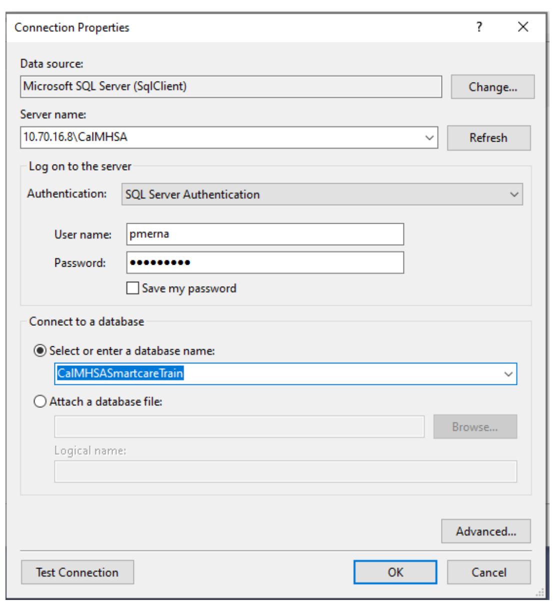
1. After the project has been successfully set up, find the **Solution Explorer** and right click on **Shared Data Sources** and choose **Add New Data Source**



2. In the Shared Data Source Properties window, enter "**Streamline**" as the Name and choose **Microsoft SQL Server** for the Type

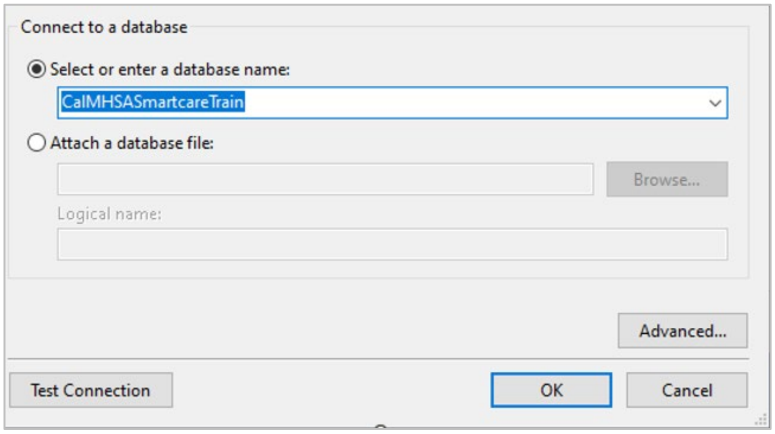


3. Next, click on the **Build** button to create the data source
4. In the Connection Properties window, enter your county's SQL Server IP Address in the **Server Name** field (do NOT click on Refresh)
    a. Question – How do I know my county's SQL Server IP Address for PROD and non PROD databases?
    b. Answer - Please contact CalMHSA to get this information

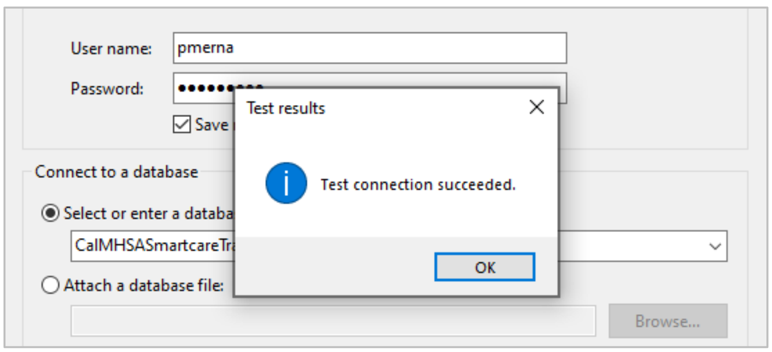


c. Enter the user name and password for the SQL Server account previously requested from Streamline

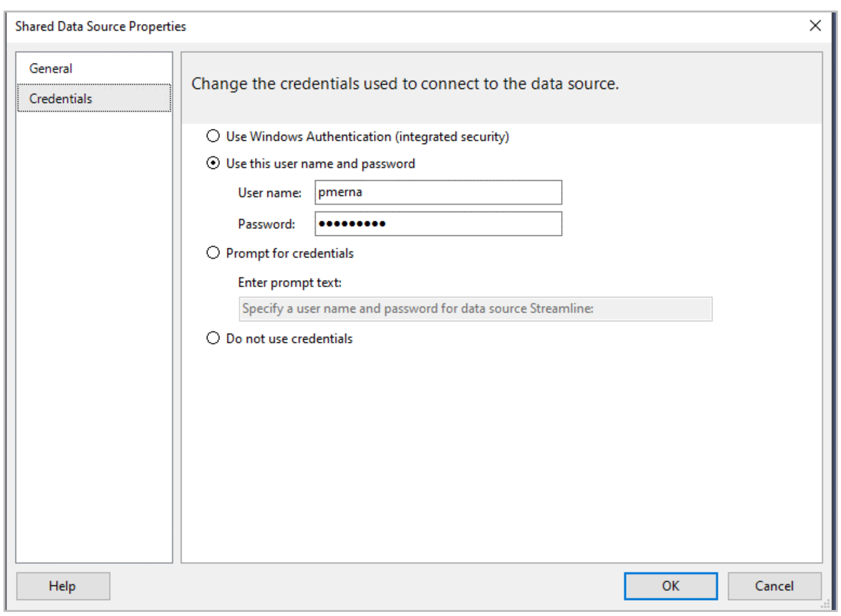
d. If the user name and password are correct, click on the **Select or enter a database name** field will display the list of databases that are available based on the permissions of the SQL Server user account



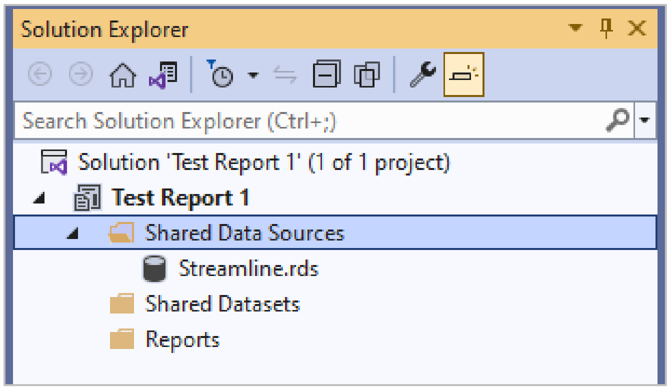
5. Click **Test Connection** to verify the connection is successful



6. In the Credentials window, you should see the user name and password in the **Use this user name and password** prompt to avoid re-entering the user name and password when previewing data



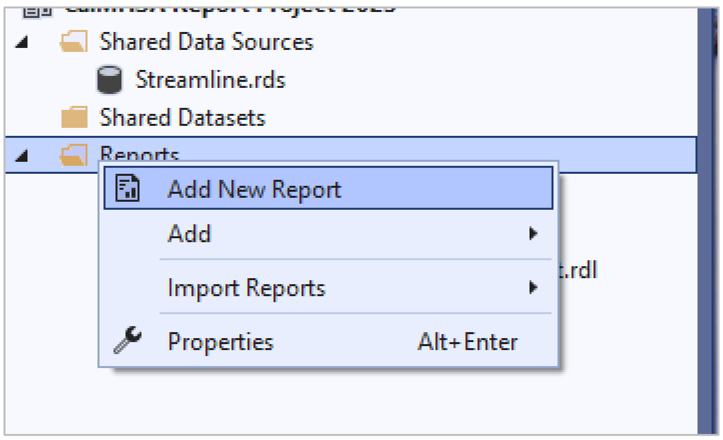
7. Upon completion, there should be a new datasource called **Streamline.rds**



Creating a New Report Cont.

Now that a project and datasource have been set up, a new report can be associated within the project and data source.

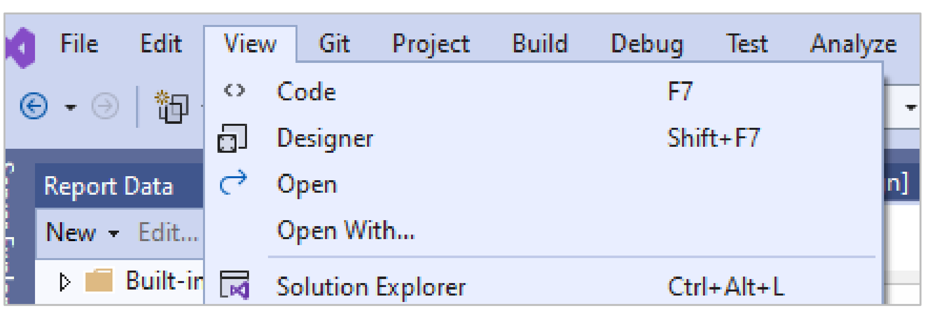
1. Right click on **Reports** folder and choose **Add New Report**

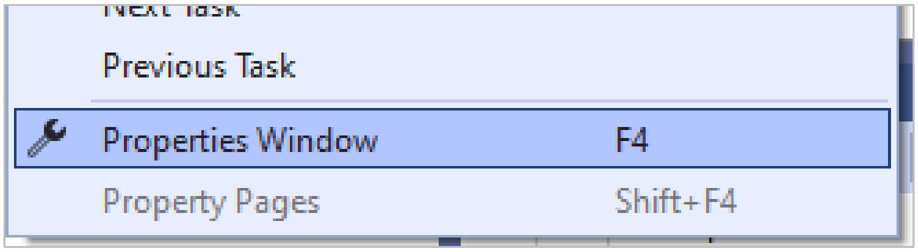


2. When creating new reports for your county, think about **Naming Convention** and be consistent with it. Upon selecting a report from a drop down list in SmartCare, all reports (product or custom) will be in the same drop down alphabetically so the naming convention can be important to quickly navigate to the county reports

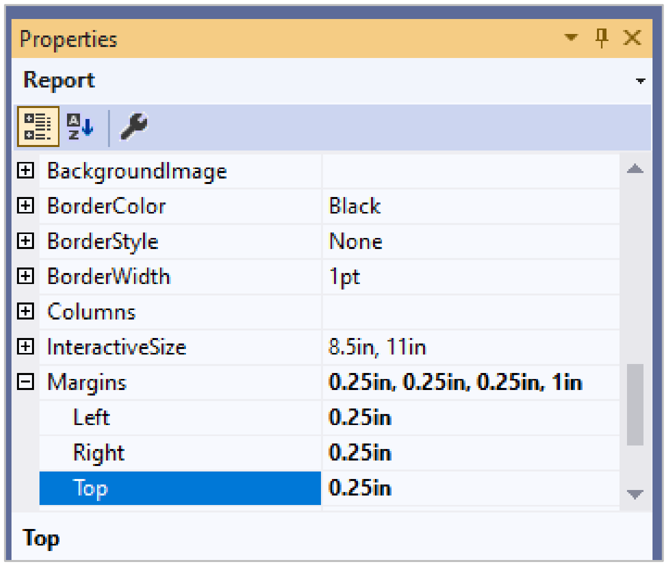
How to Change Report Properties

1. You can change the report properties such as margins by clicking on **View** from the top level menu and then choose **Properties Window**



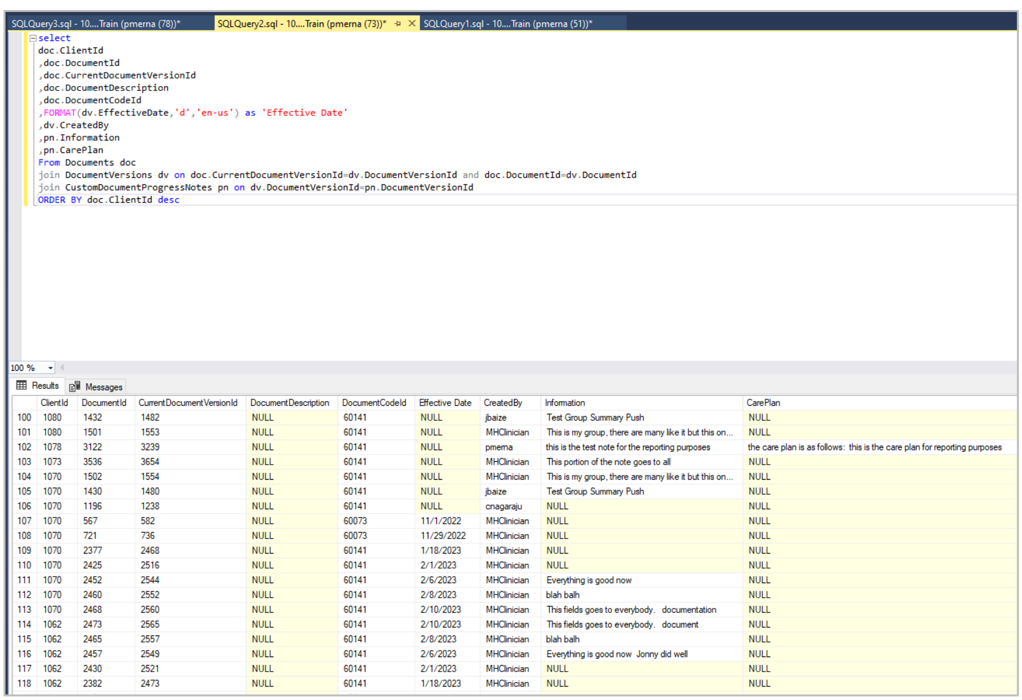


- **Note**: you must click on the main report area to get all report properties such as margins



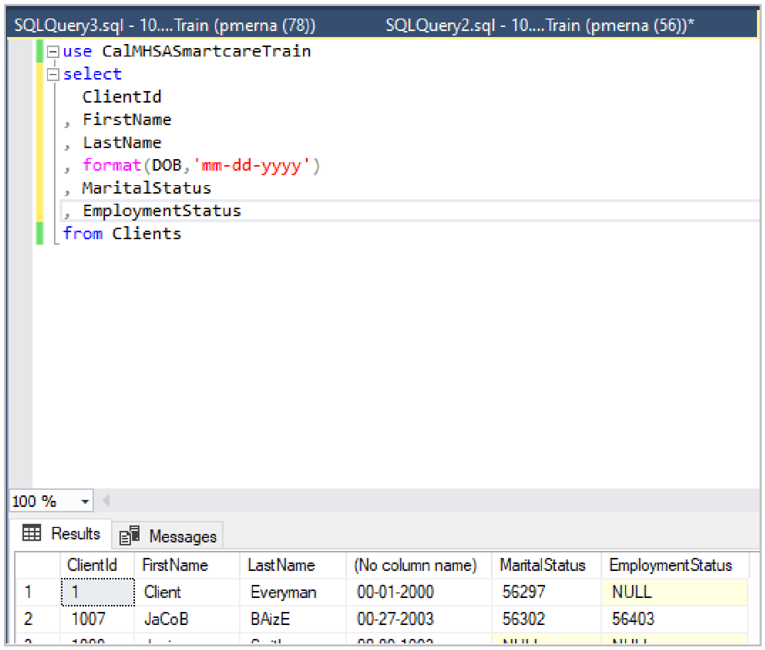
How to Add a Data Set from SSMS

1. Next add Dataset which is equivalent to a query, this is where you need to create a query from **MS SQL Mgmt Studio**
2. Create data set in MS SQL Server Mgmt Studio



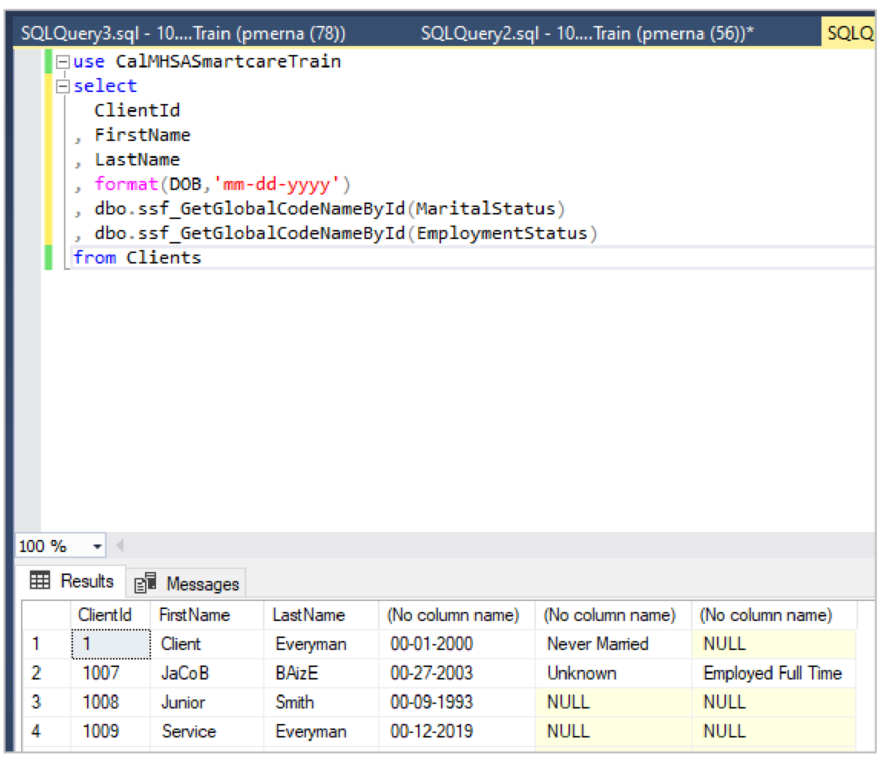
Global Code Translation

Since SmartCare is a normalized database, all global code fields in any table will only contain the code and in order to display the more user friendly global code description, a function will need to be used as follows:

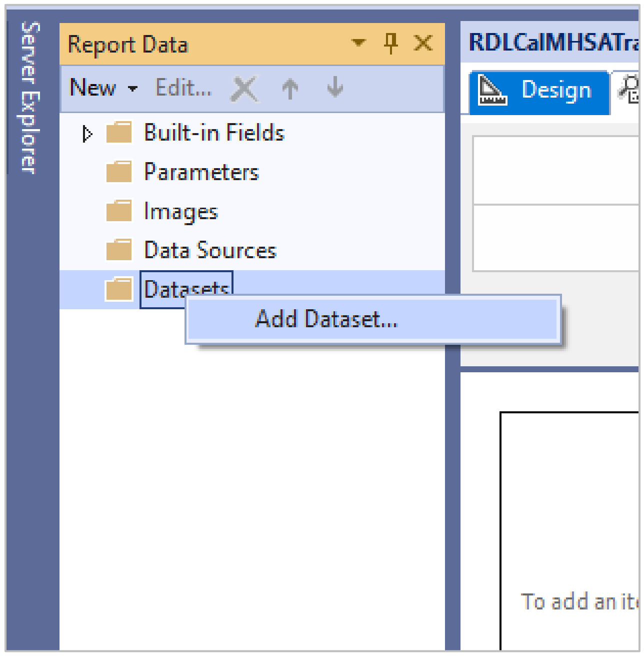


In this example, the MaritalStatus and EmploymentStatus are examples of global codes where just the code is in the Clients table.   To display the description of the global codes, a function can be used as shown below:

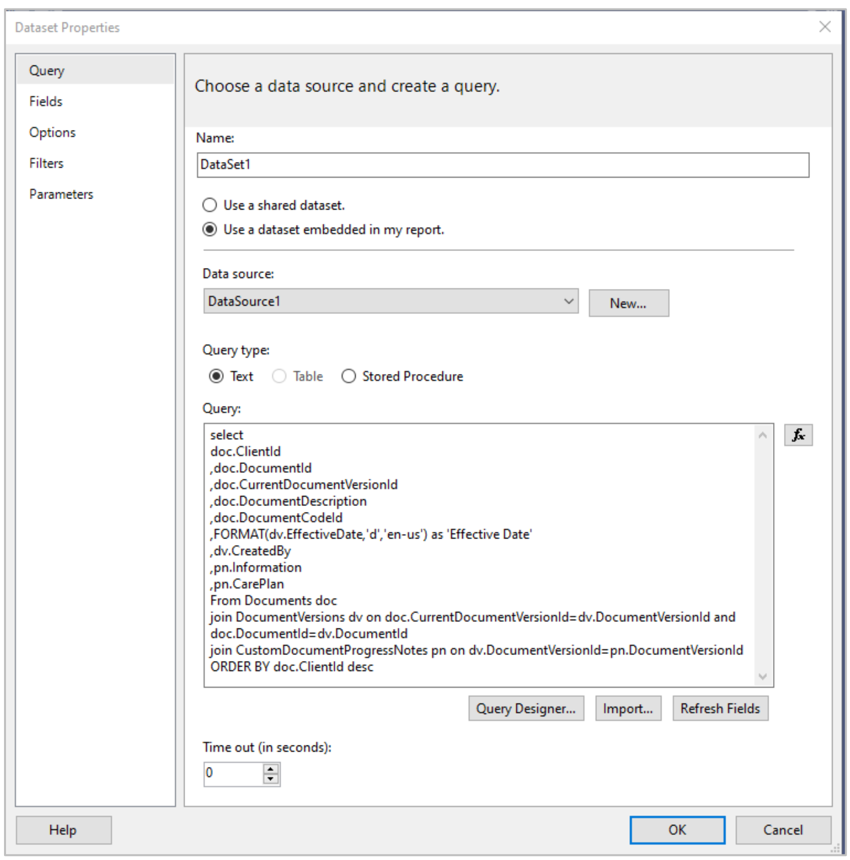
1. Enter **dbo.ssf_GetGlobalCodeNameById** prior to database field enclosed in parentheses



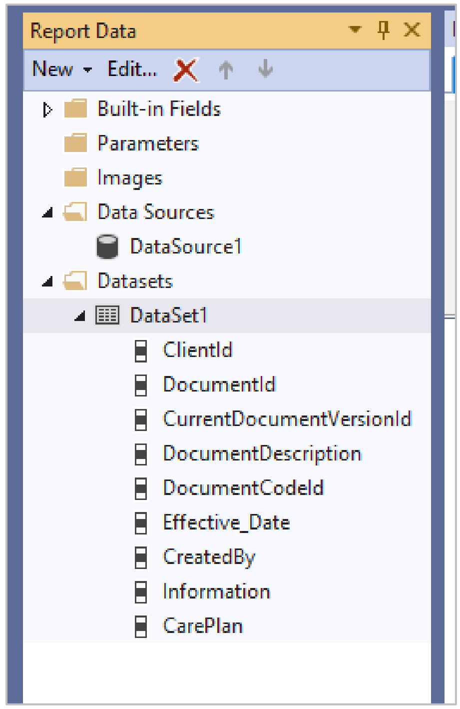
2. Next, copy the query and add it to the dataset in MS Visual Studio by right clicking on **DataSets** and choose **Add Dataset**



3. Select **Use a dataset embedded in my report,** choose **Text** for **Query Type** and copy query text into **Query:** box and then click **OK**



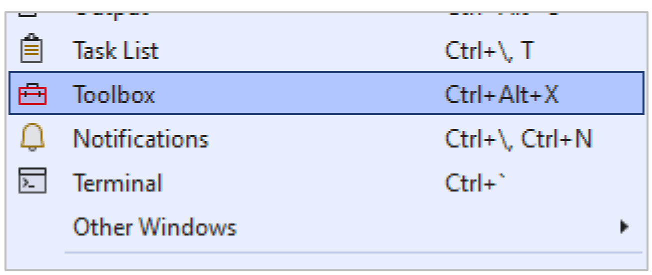
4. Now the dataset is available under **Datasets** area of Report Data window



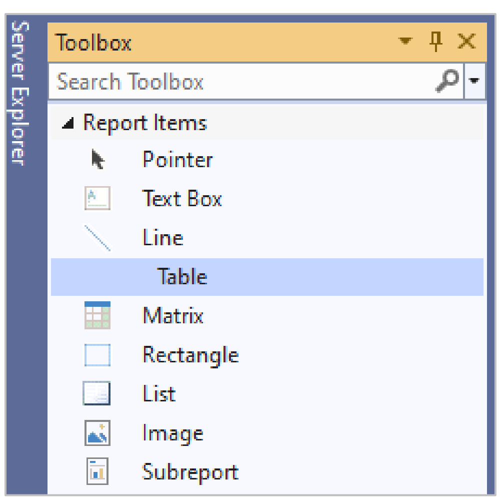
Fields from SQL query created in MS SQL Server Mgmt Studio are now available to insert into report layout in MS Visual Studio

Toolbox Window

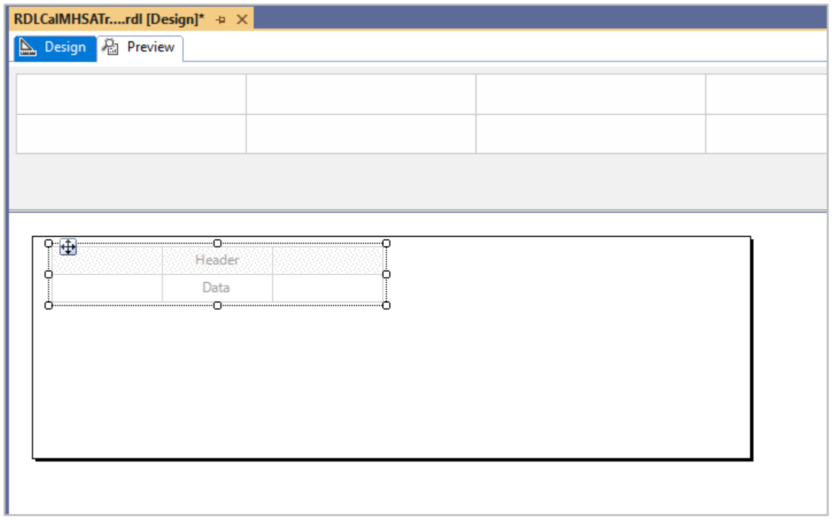
1. Click View on top menu and choose **Toolbox** or click **Ctrl+Alt+X** to display toolbox window



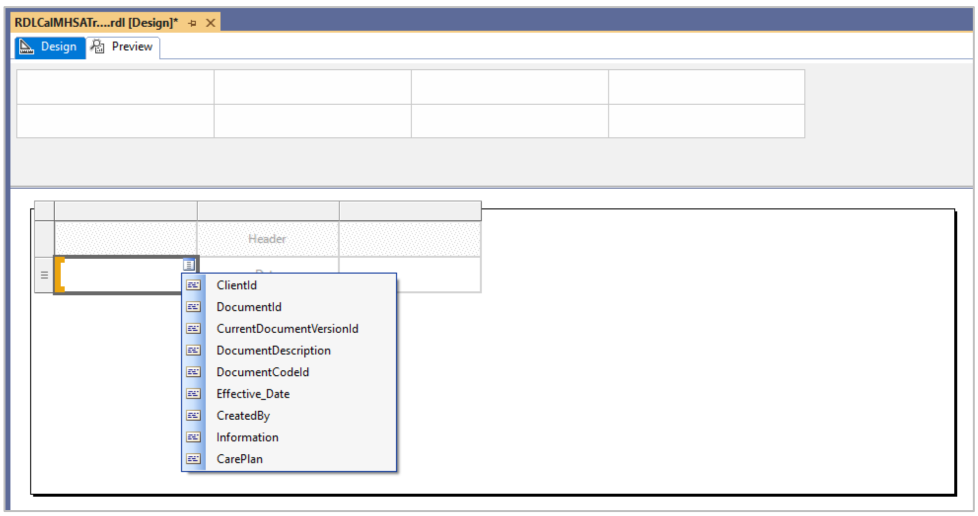
2. Left Click on **Table** and drag into report **Design** area



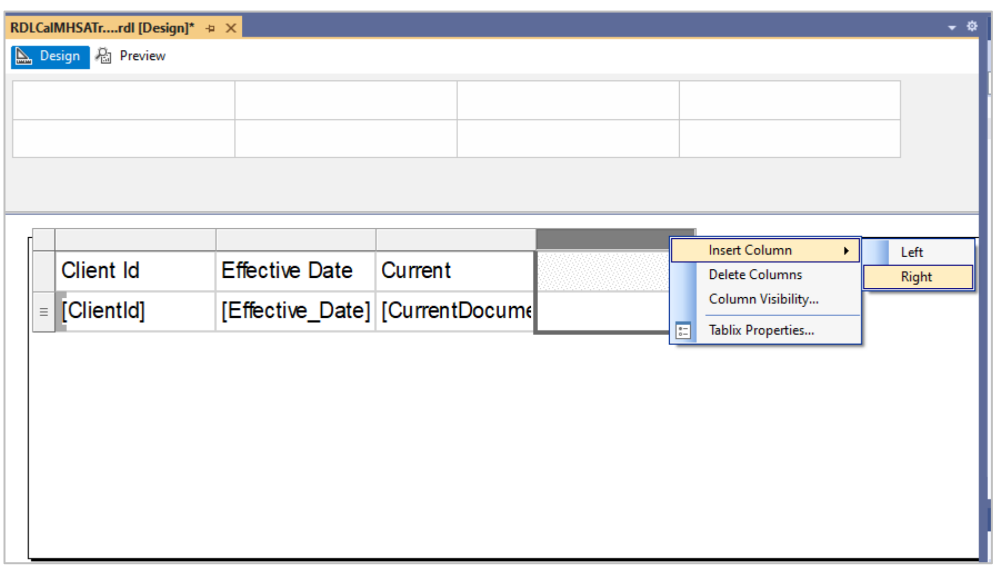
3. A table will appear with a default three columns (more can be added later)



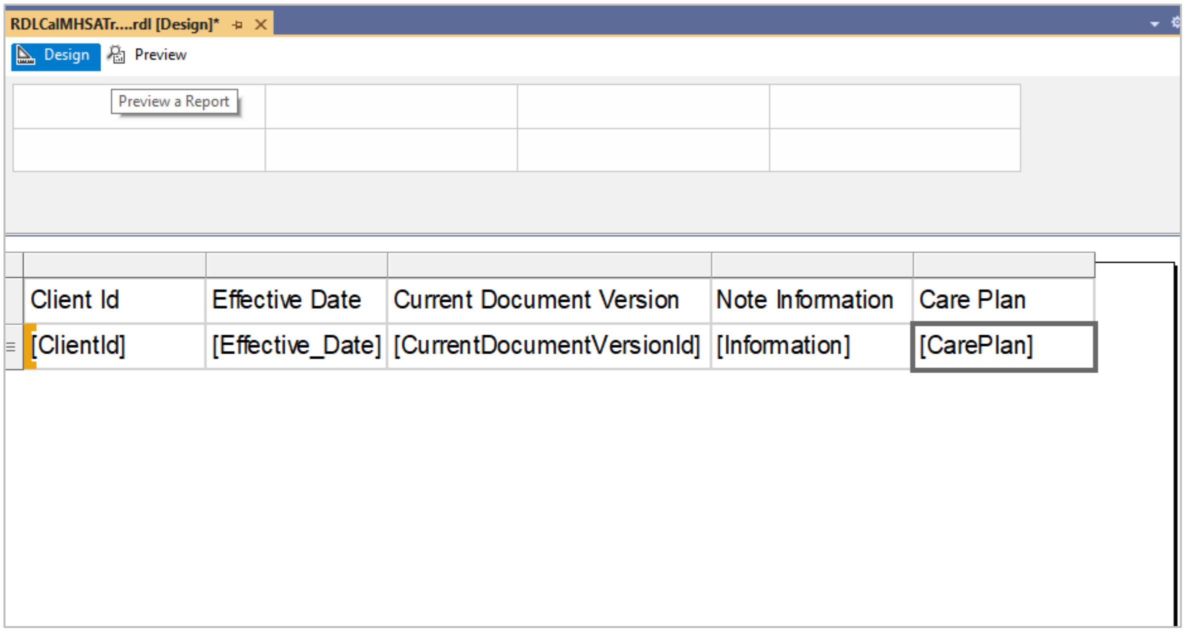
4. Click on upper right of a cell to select field for that column



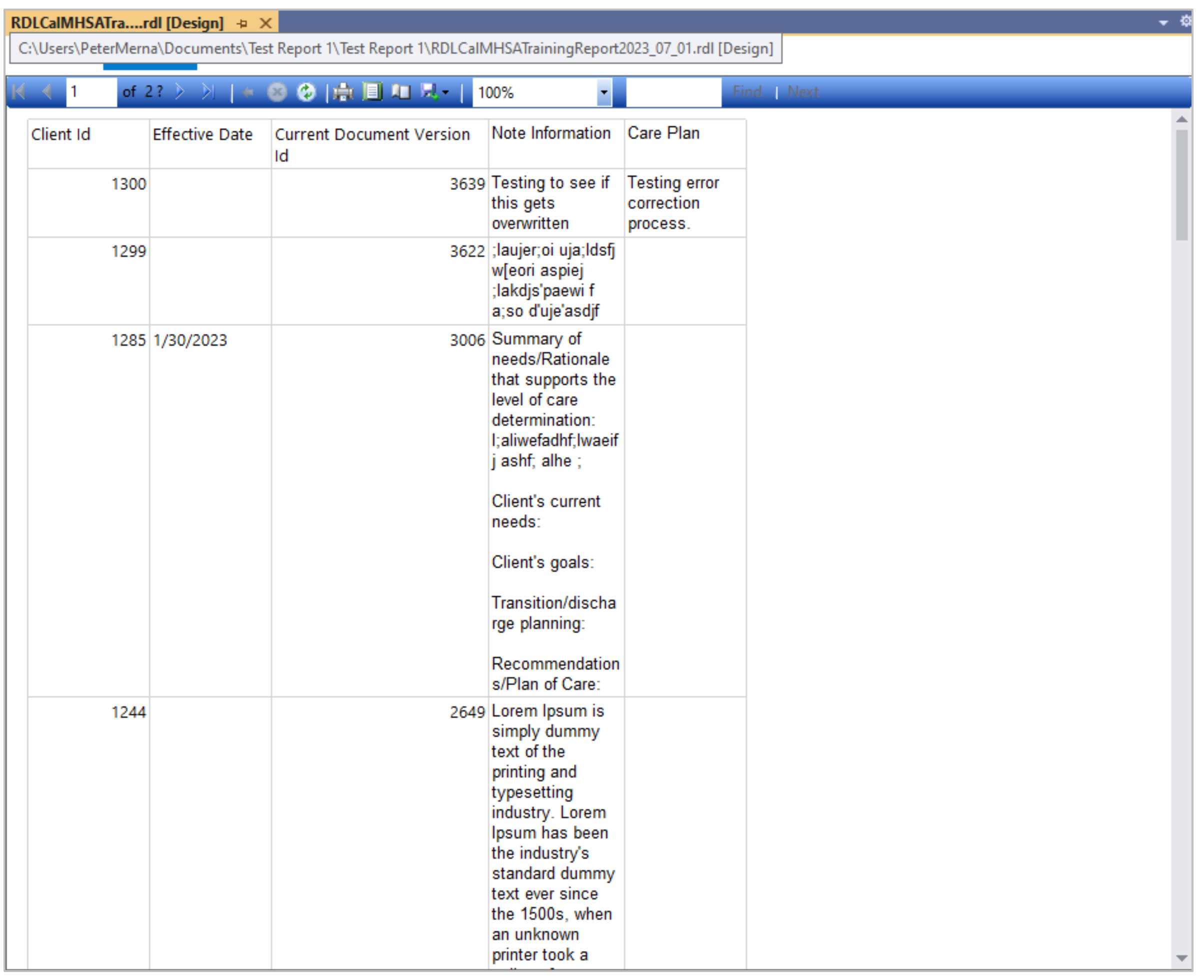
5. To add more columns, right click on column header to get contextual menu to add or remove columns



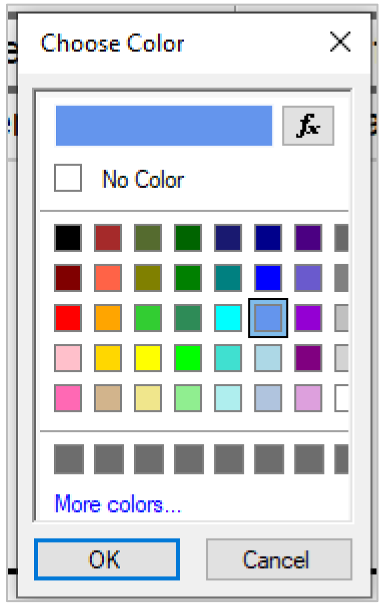
6. Repeat as necessary

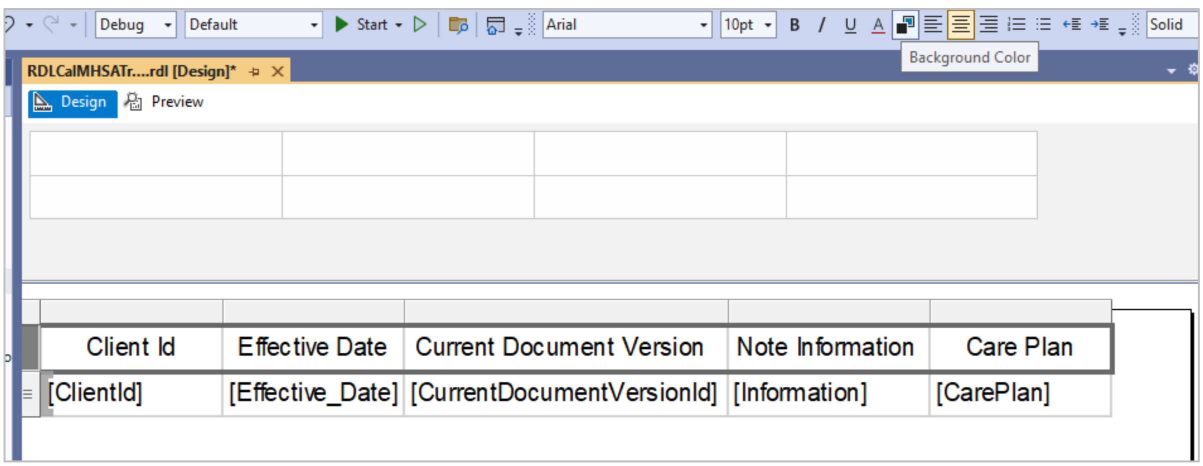


7. Add more columns and then click Preview tab



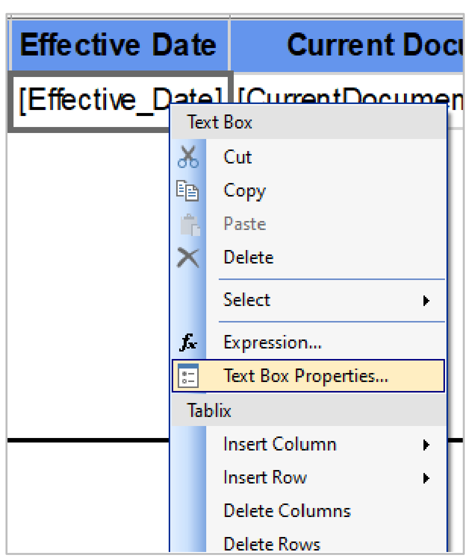
8. Back to Design tab, center labels and choose background color and click OK.



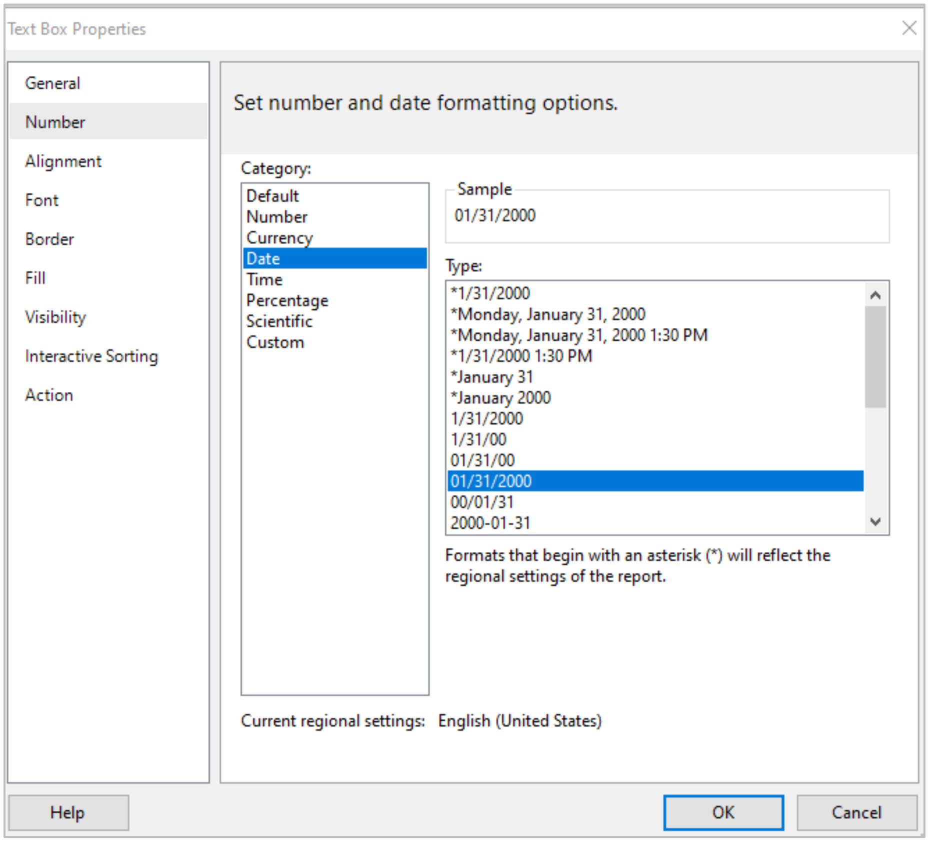


How to Format Columns

1. You can format certain columns to be of certain data types such as a date by clicking on the column and choose Text Box Properties

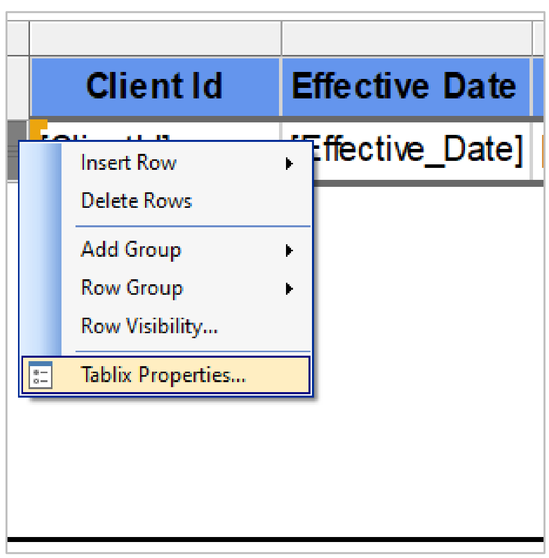


2. Select **Date** in Category box and then select date format and click OK

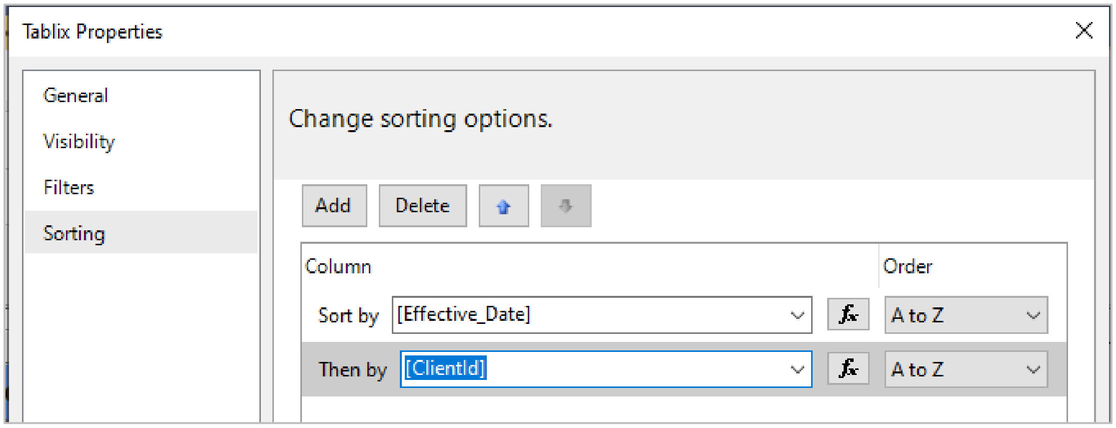


How to Add Sorting

1. Right click on left border of column, select **Tablix Properties**

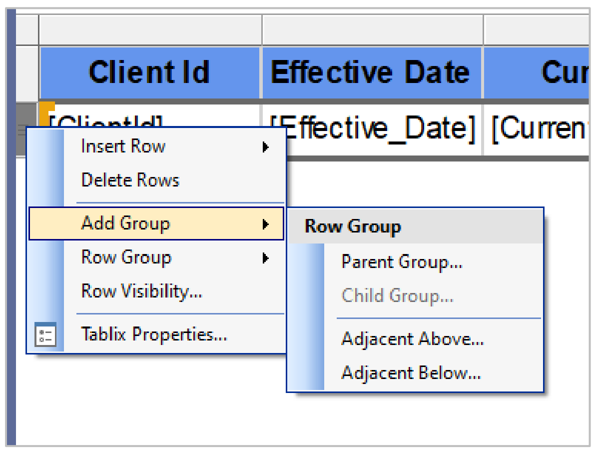


2. Choose Sorting and **Add** column(s) to sort report

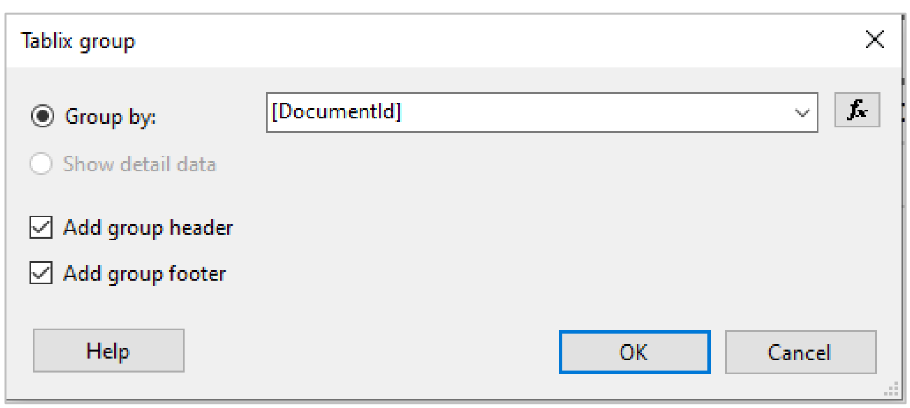


How to Add Groups

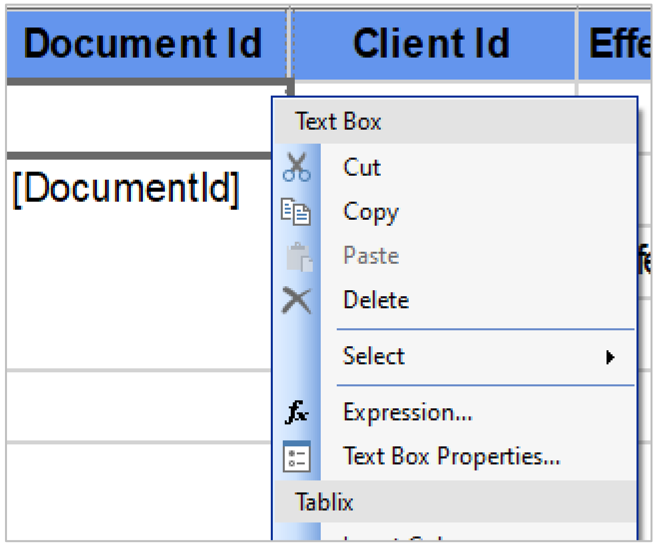
1. Right click on left border of first column and choose **Add Group** and then select **Parent Group**



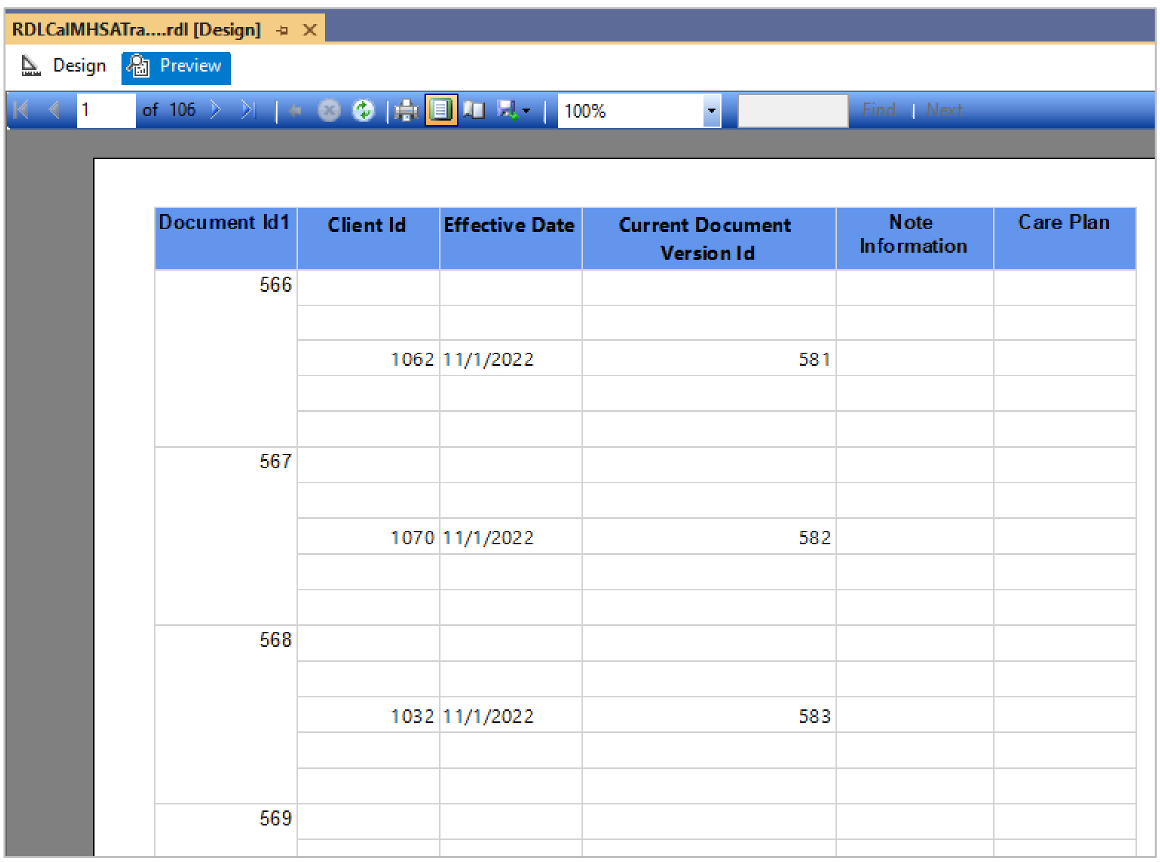
2. Choose column for parent group from the list, choose **Add group header** and/or **Add group footer** and click **OK**



3. Redundant columns can be removed from details area by right clicking on the column and then choosing **Delete**

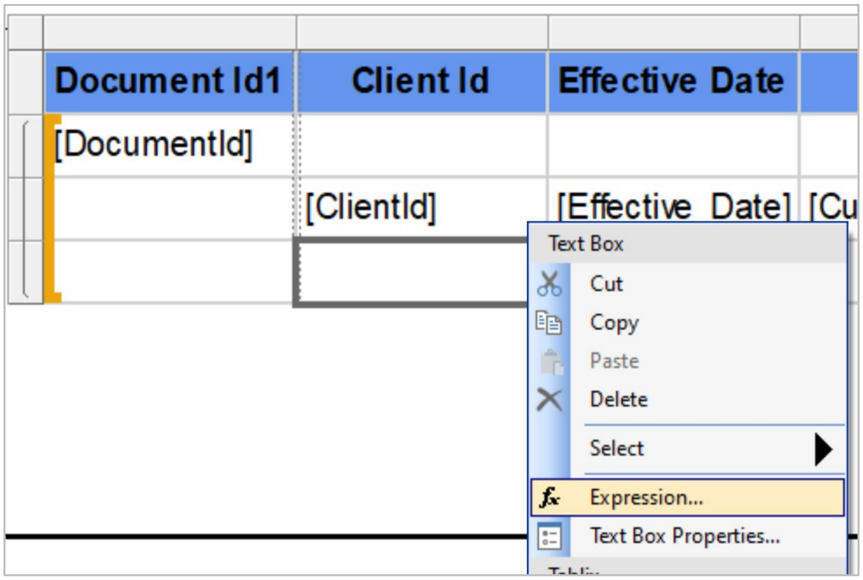


4. Print Preview with Group added

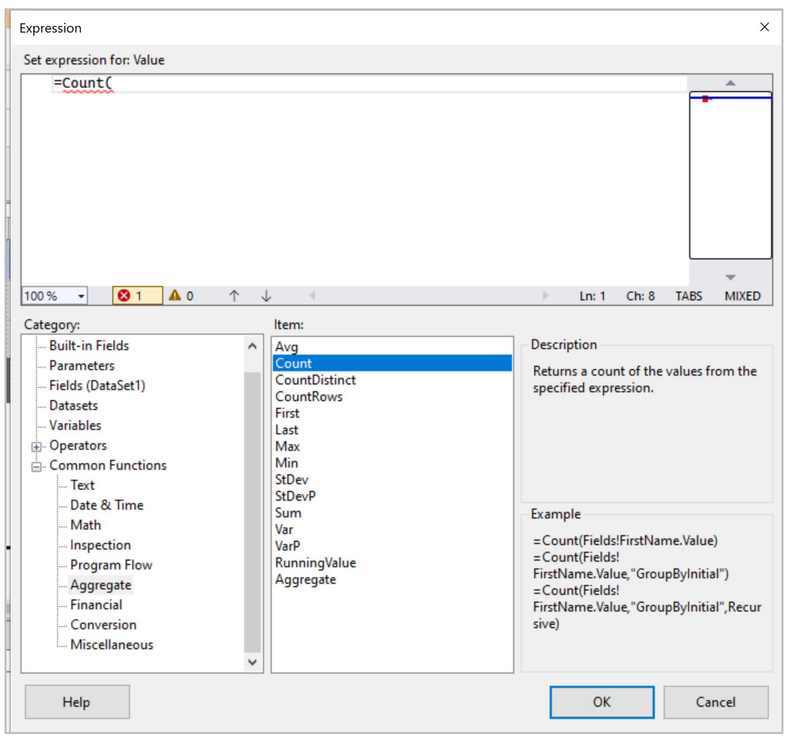


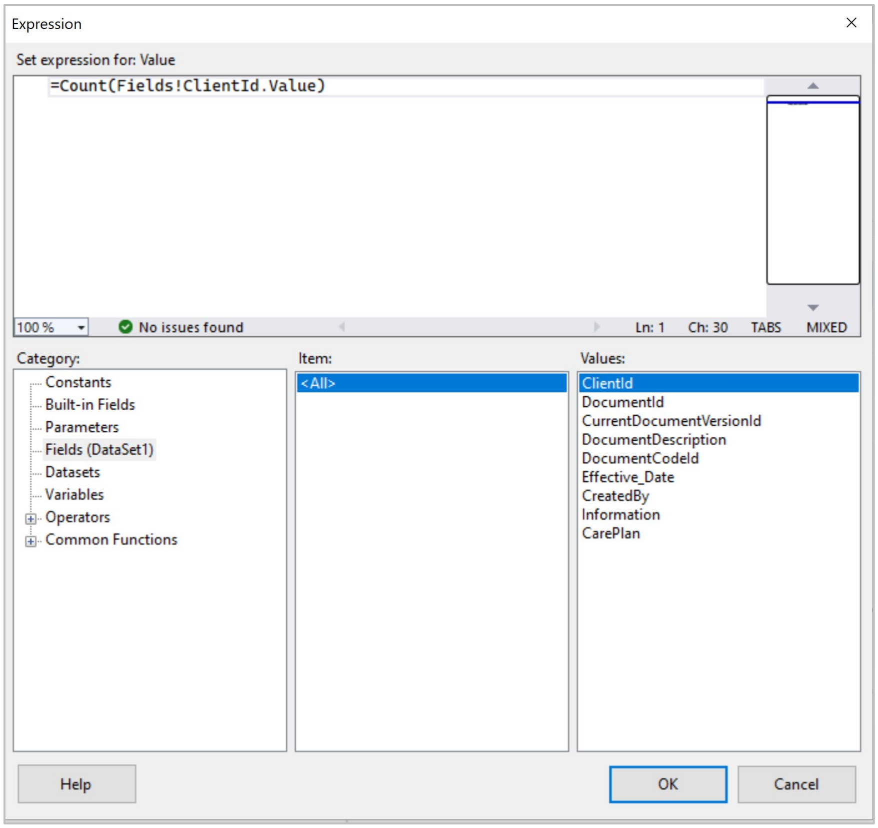
How to Add Sums, Counts, and Other Expressions

1. Now that a group has been added, it is possible to add sum fields by simply right clicking on the field that needs to be summarized and then choose **Expression**

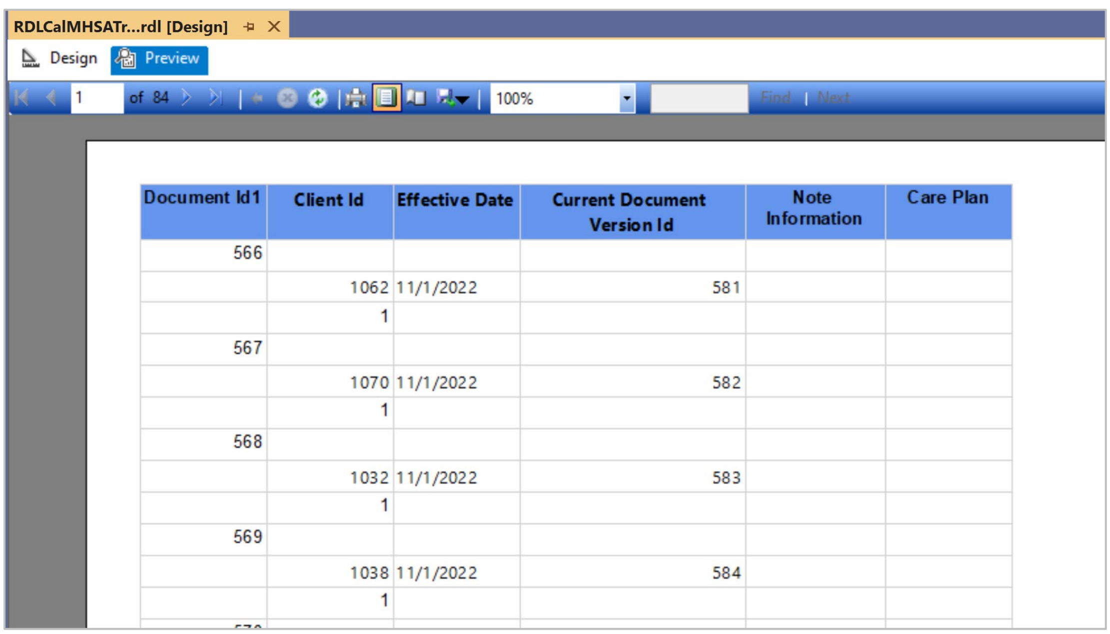


2. In the expression **Category** window, choose the Common Functions and expand and click on **Aggregte** and then choose the type of summary from the Item list

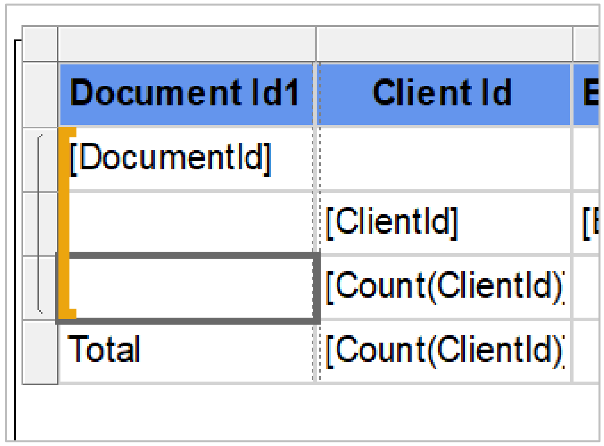


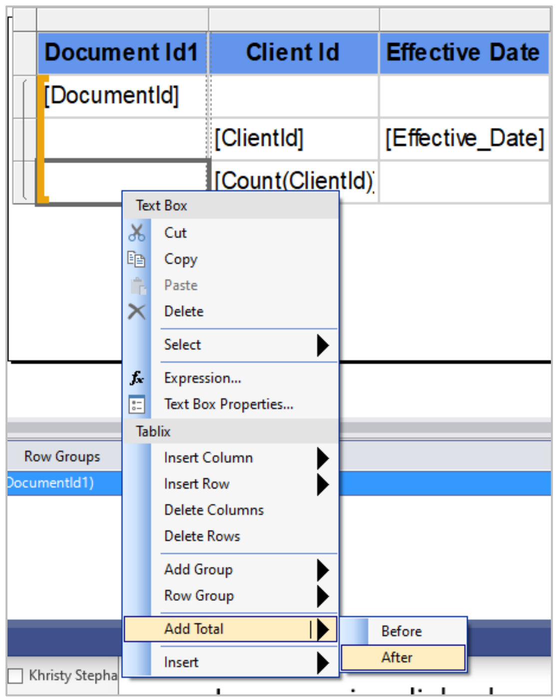


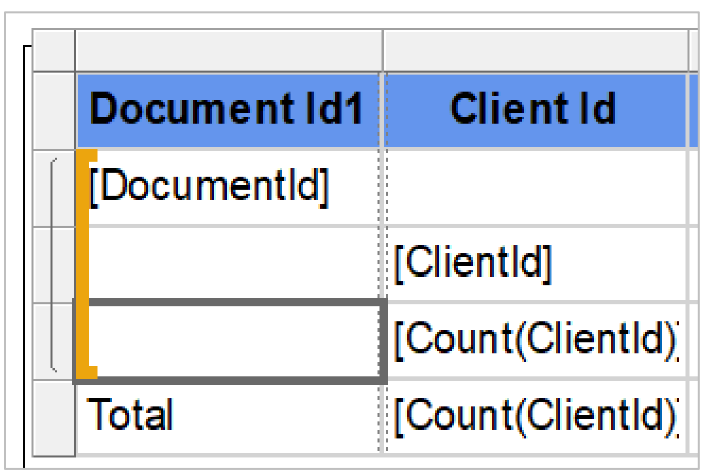
3. Next, click on **Fields (Dataset1)** and then select field to aggregate such as **ClientId** to create a count of client IDs and **manually enter the end parenthesis** and click **OK**



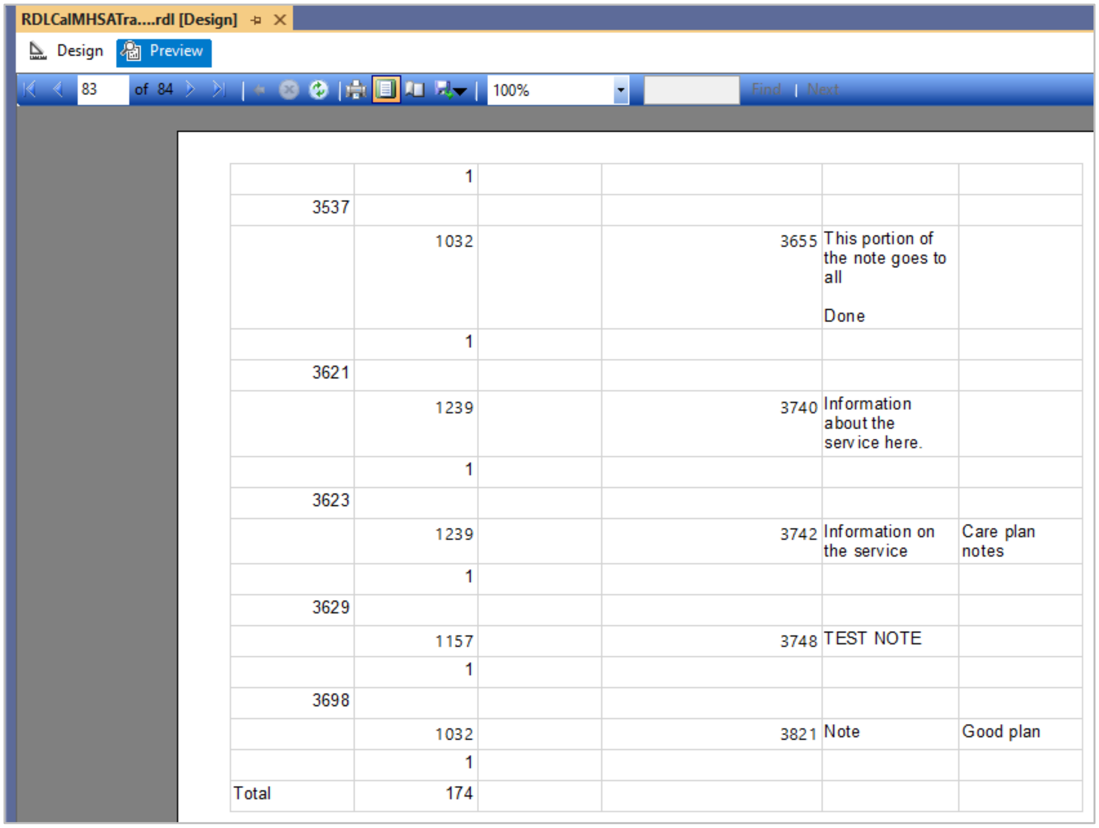
4. To insert a grand total, right click in group footer and select **Add Total** and then select **After**







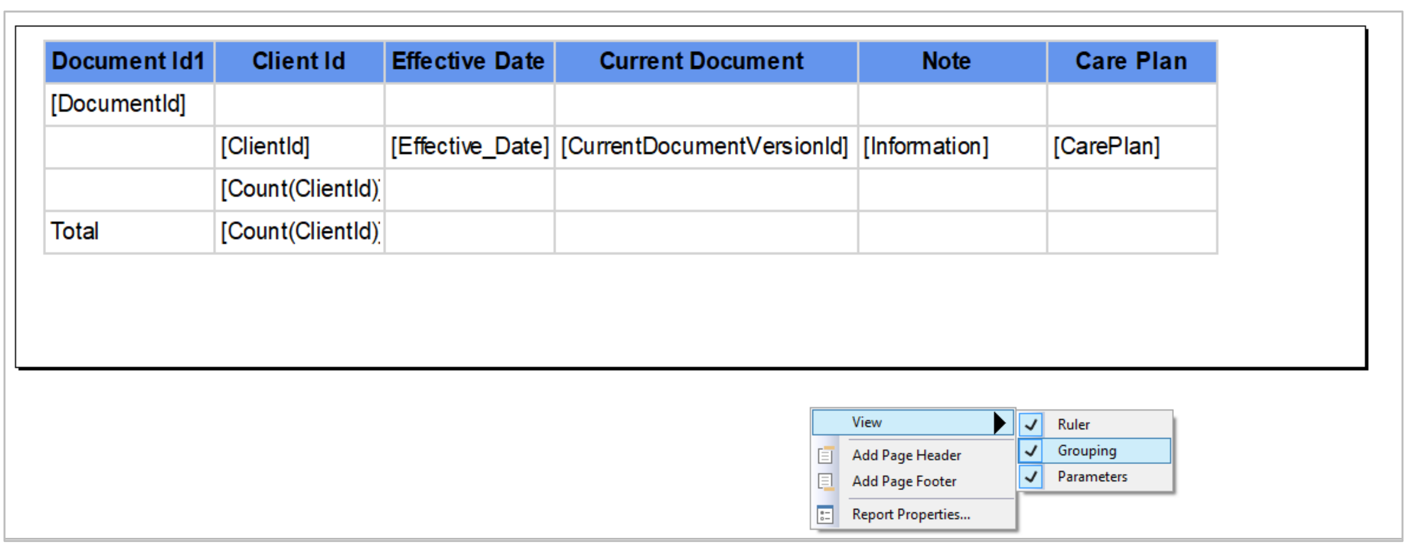
5. Click **Preview**



	1				
3537					
	1032		3655	This portion of the note goes to all Done	
	1				
3621					
	1239		3740	Information about the service here.	
	1				
3623					
	1239		3742	Information on the service	Care plan notes
	1				
3629					
	1157		3748	TEST NOTE	
	1				
3698					
	1032		3821	Note	Good plan
	1				
Total	174				

Repeat Group Headers

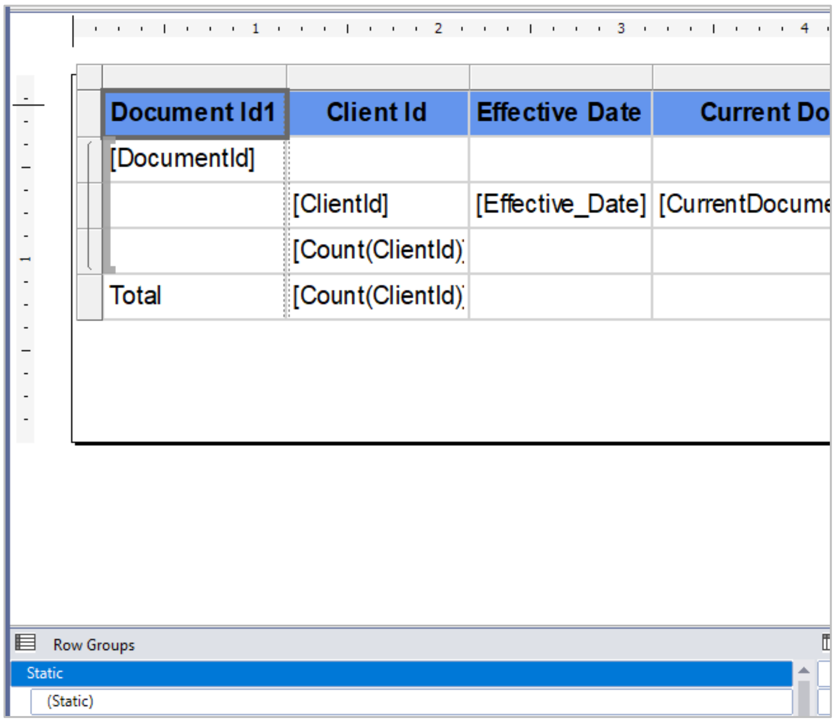
1. Sometimes the amount of data within a group will exceed the display area of a page and will create data over multiple pages however it will be helpful to end users to display the group header so the user knows what group a given record is associated with. In order to do this, we will need to repeat group headers as shown below:



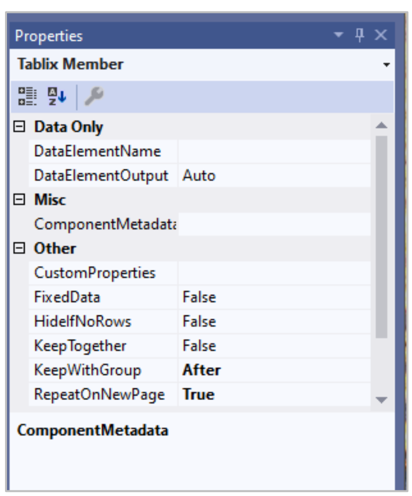
Document Id1	Client Id	Effective Date	Current Document	Note	Care Plan
[DocumentId]					
	[ClientId]	[Effective_Date]	[CurrentDocumentVersionId]	[Information]	[CarePlan]
	[Count(ClientId)				
Total	[Count(ClientId)				

2. Click outside of report print area and right click with mouse to get **View** options and choose **Grouping** which will display the grouping view below report print area on screen

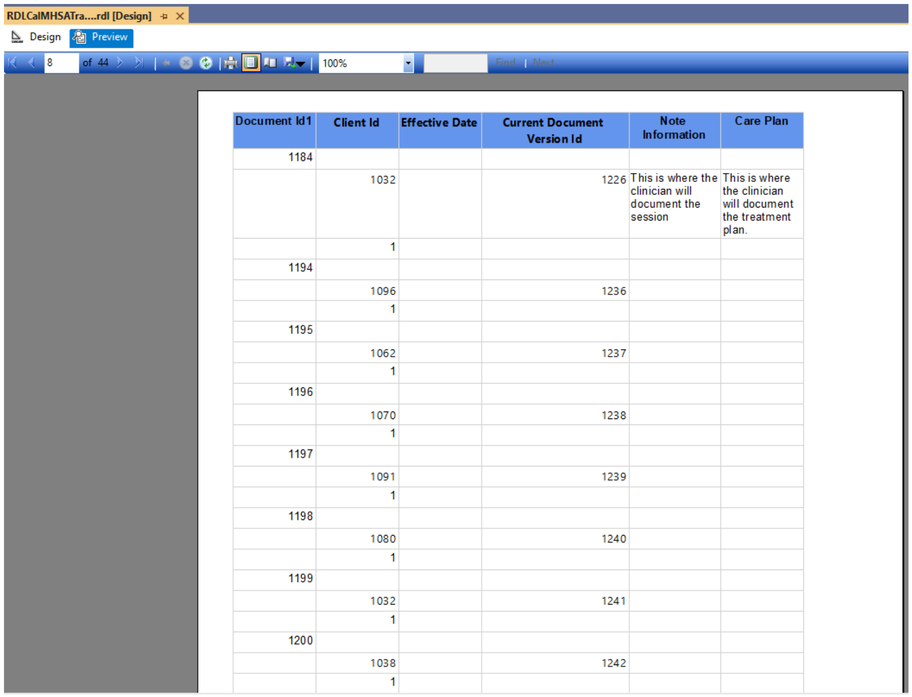
3. Click downward triangle in **Column Groups** and select **Advanced Mode** which will display row groups, click on **Static** which will highlight first group and then display **Tablix Member** in **Properties** tool box



4. Within **Tablix Member** change properties to **RepeatOnNewPage – True, KeepWithGroup - After**



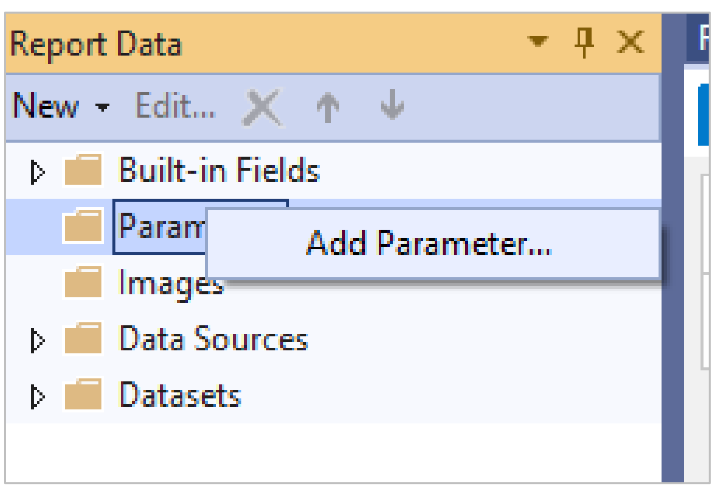
5. Click **Preview**



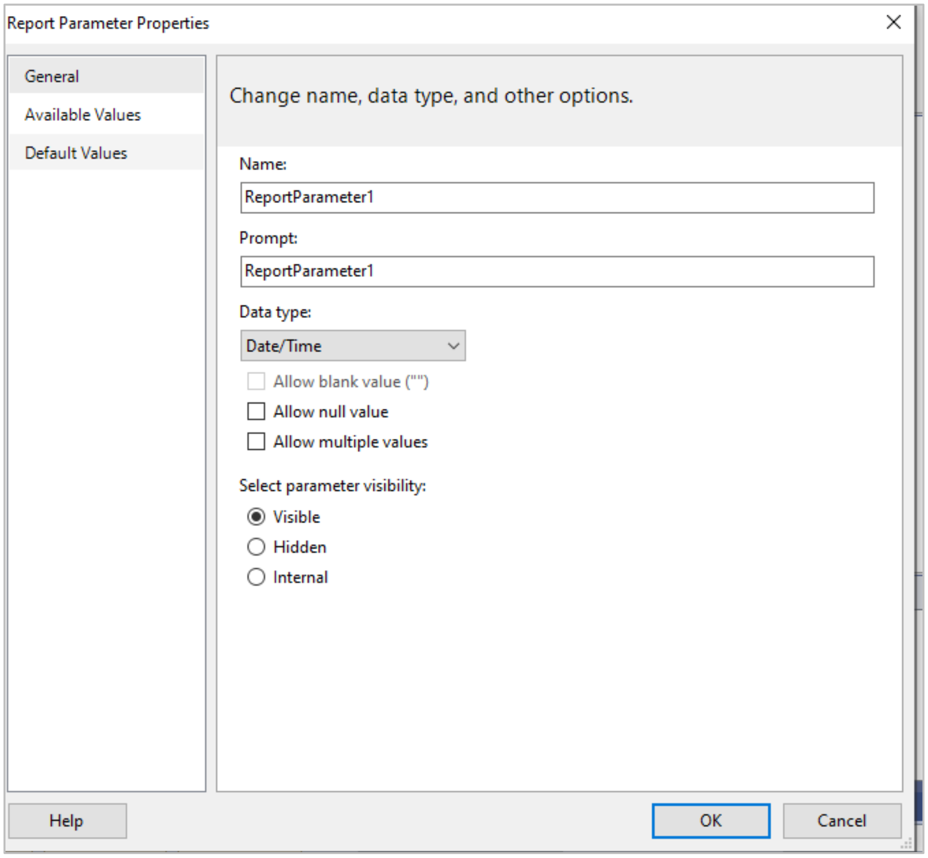
6. Group headers are now on each page

Add Parameters – Date, Single select, multiple select, etc.

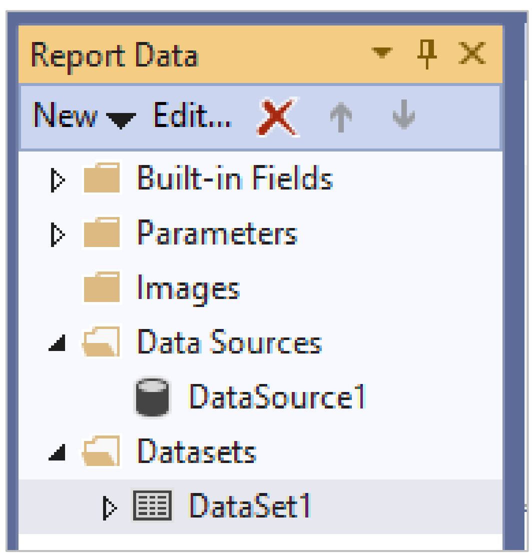
1. To make reports more useful, it will be necessary to allow end users to input values prior to running a report to determine which records will be displayed via parameters. To add parameters, simply right click in the **Parameter** area of the **Report Data** window and click **Add Parameter**



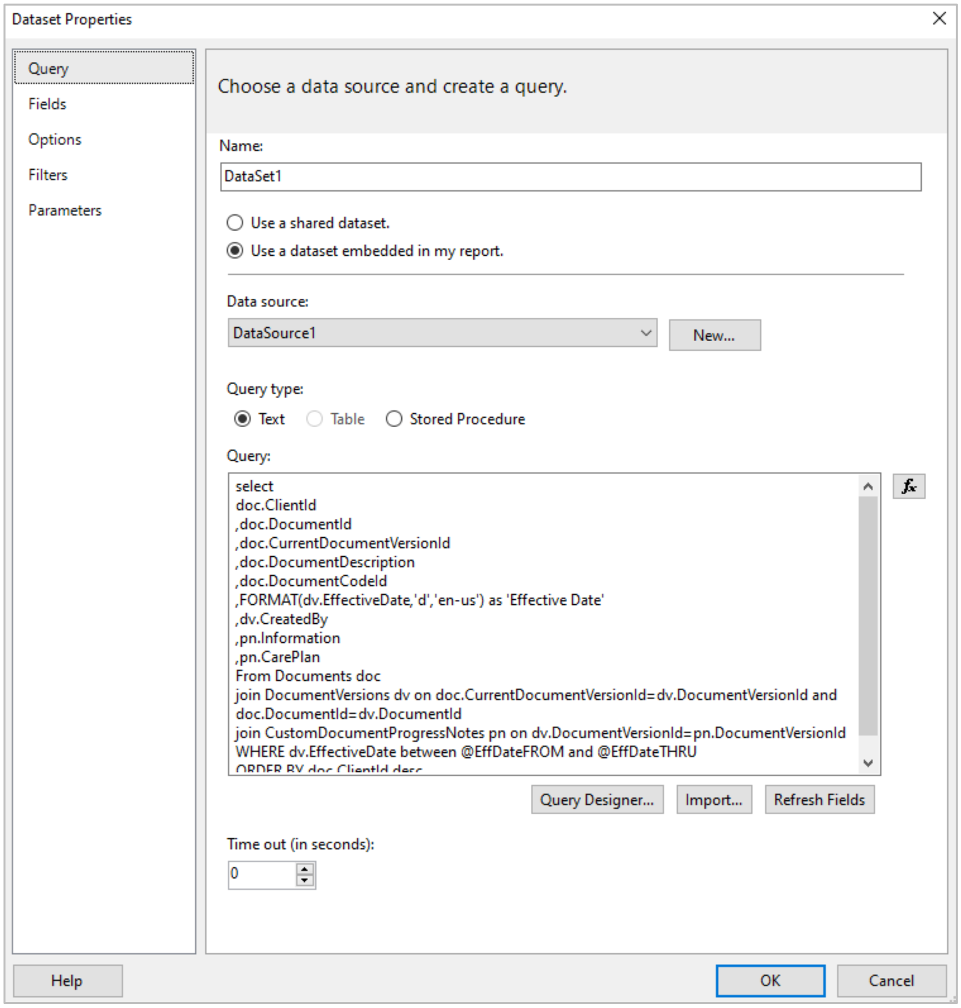
2. Enter the Name and Prompt of the parameter and choose the **Data type**



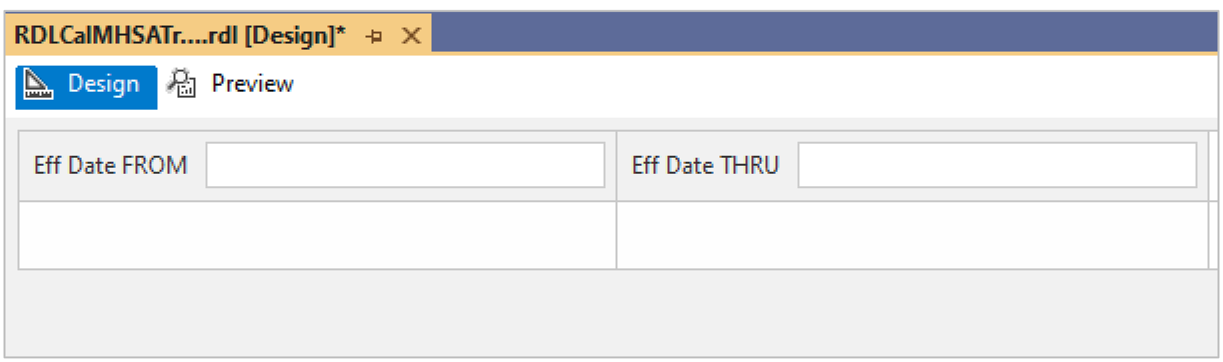
3. If the parameter(s) are not included in the dataset query, they can be inserted editing the query text



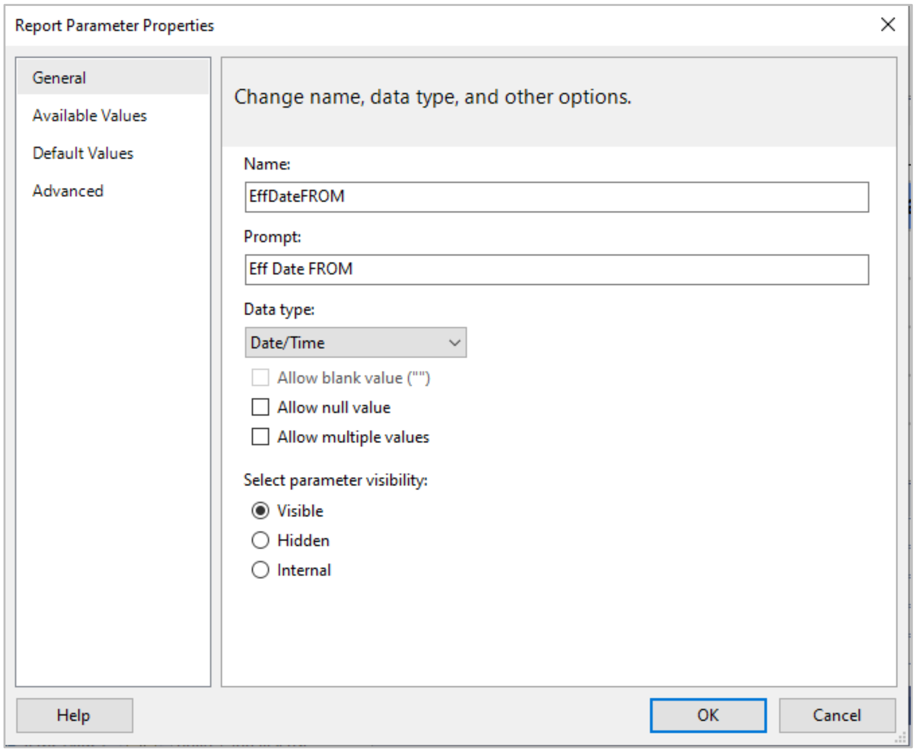
4. Double click on the **DataSet** to display query window and modify query to add parameters



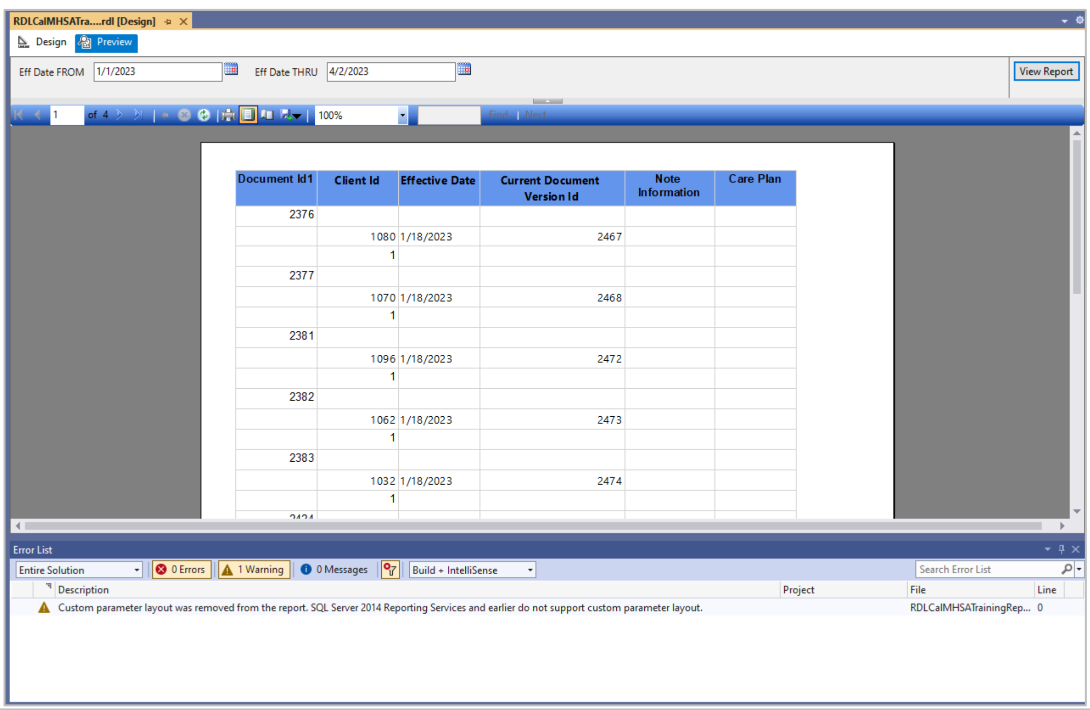
5. For date parameters, enter new statement in **WHERE** clause of query such as dv.EffectiveDate between **@EffDateFROM** and **@EffDateTHRU**

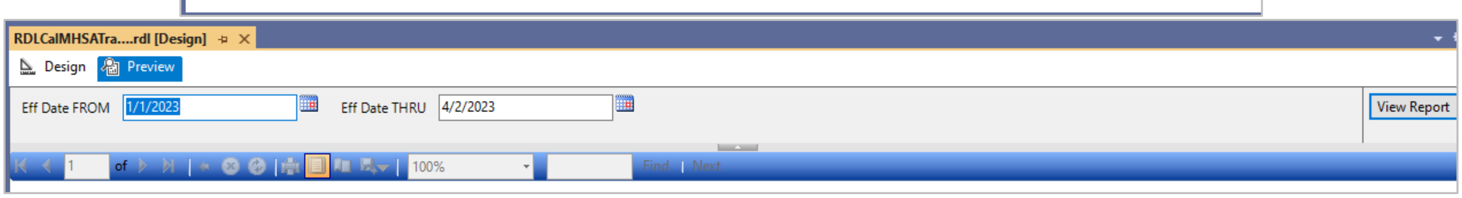


6. Report **Design** tab now shows date parameters, double click on Eff Date FROM and Eff Date THRGU parameters to modify **Data Type** properties and change from text to Date/Time



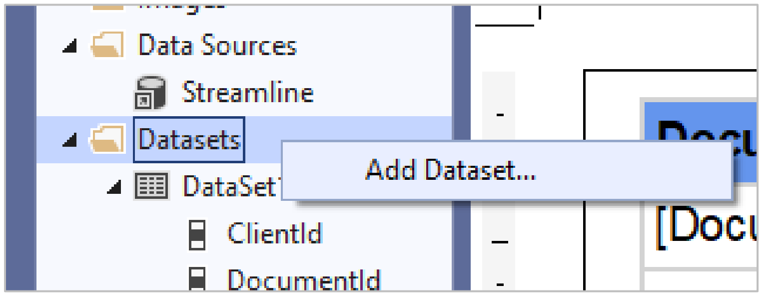
7. On **Preview** tab, enter parameter values and click **View Report**



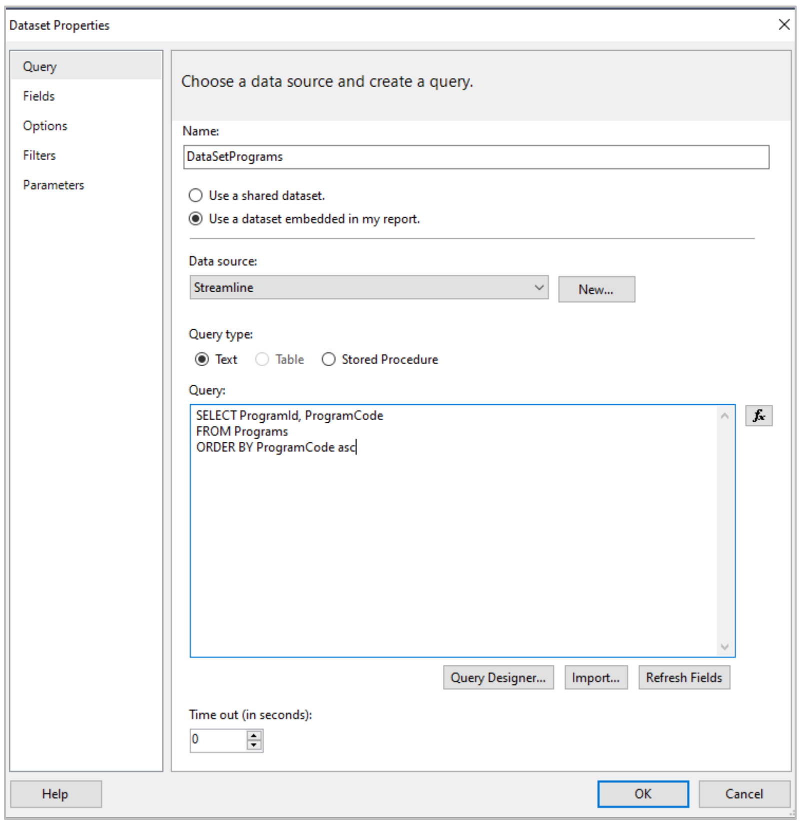


How to Add Single Select or Multiple Select Parameter

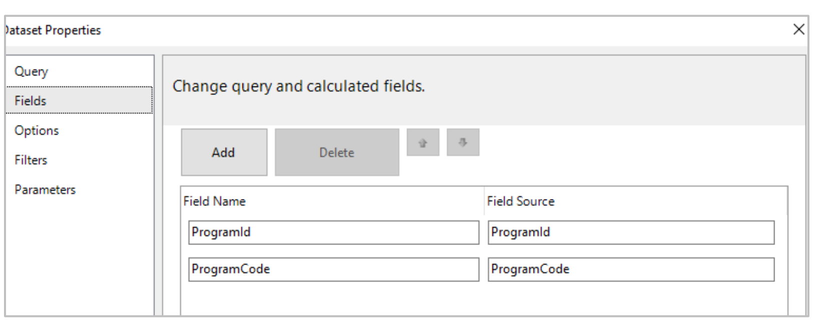
1. To add a single or multiple select parameter, an additional data set must be added for each single or multiple select parameter.
2. Right click on **Datasets** and choose **Add Dataset**



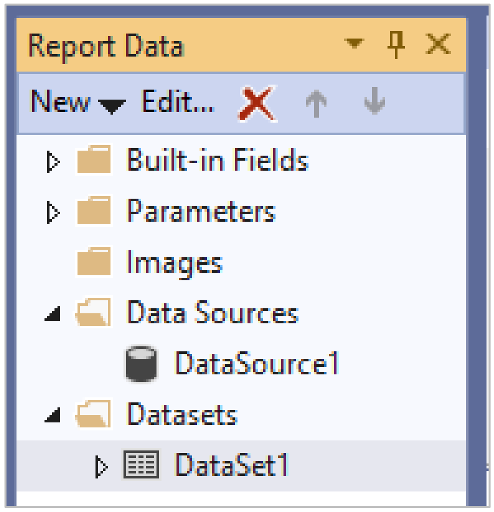
3. In the Dataset Properties window, choose **Use a dataset embedded in my report** and choose the **Streamline** dataset already created and then choose **Text** for **Query Type** and enter the query text for the parameter



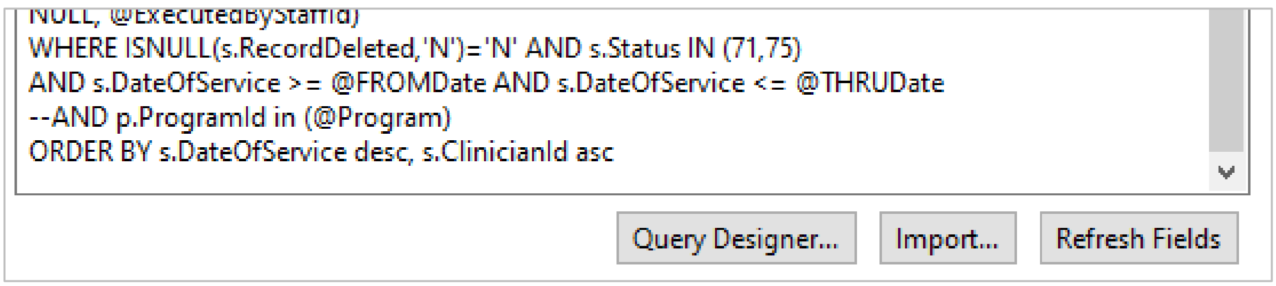
4. One final step to complete the parameter is to identify the fields that will display in the parameter and map them to the field source as shown below:



5. If the parameter(s) are not included in the dataset query, they can be inserted editing the query text

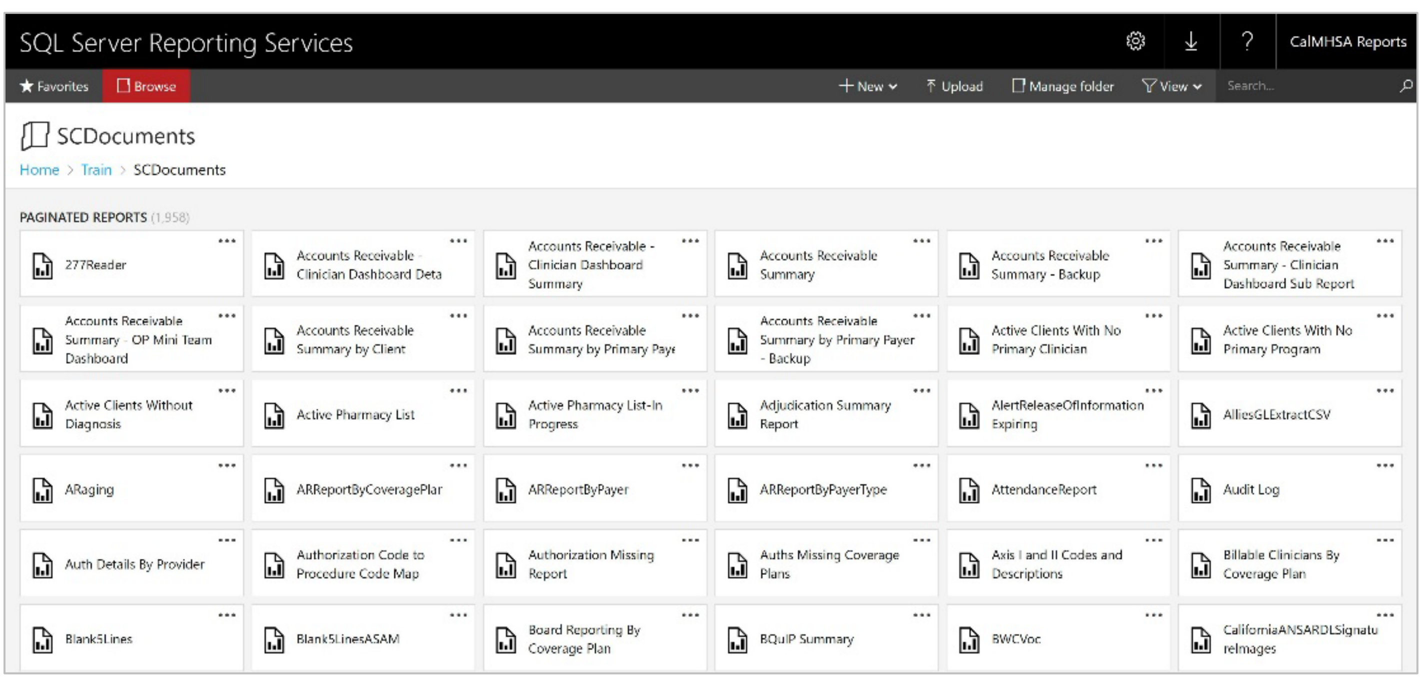


6. Double click on the **DataSet** to display query window and modify query to add parameters

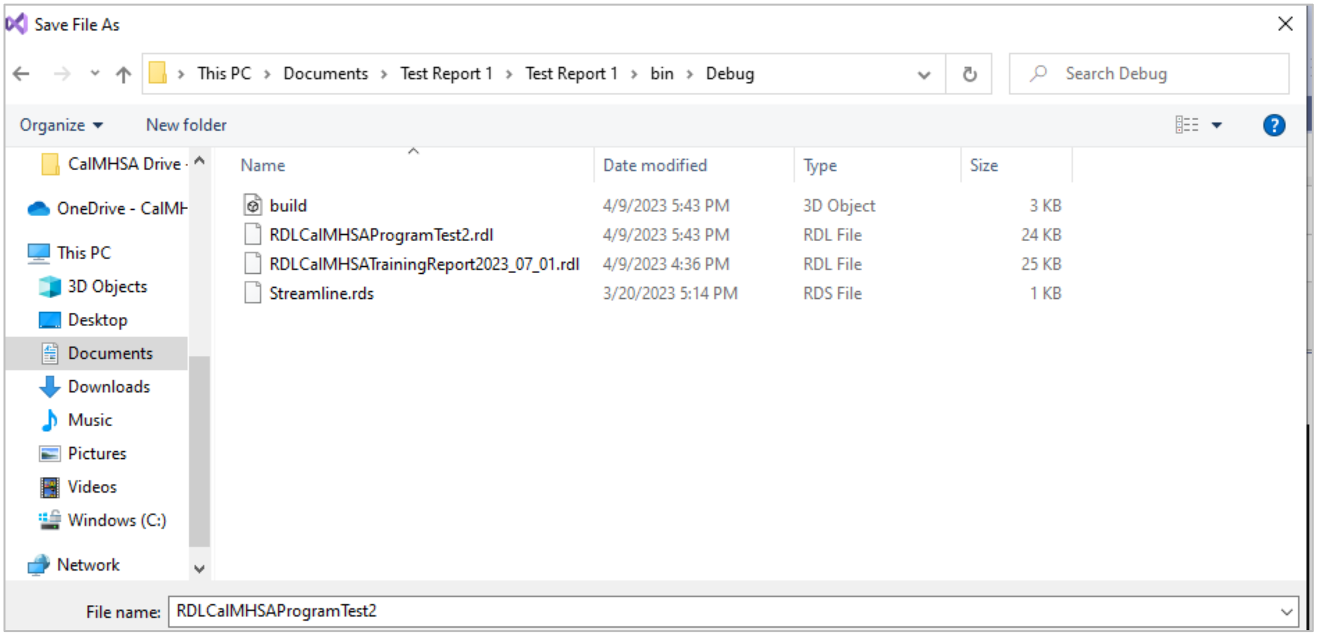


How to Upload RDL File to Reports Server

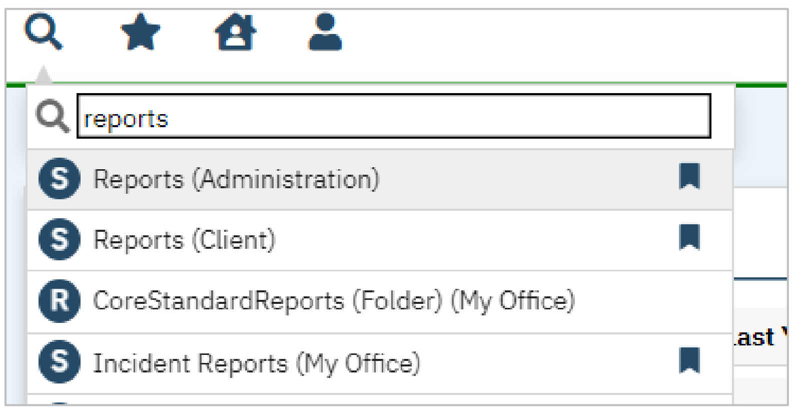
To make the report available in SmartCare, it must first be uploaded to the county's report server. First, open an internet browser window and navigate to the url for the county report server. Note – the report server IP address and user ID and password can be obtained by contacting CalMHSA.



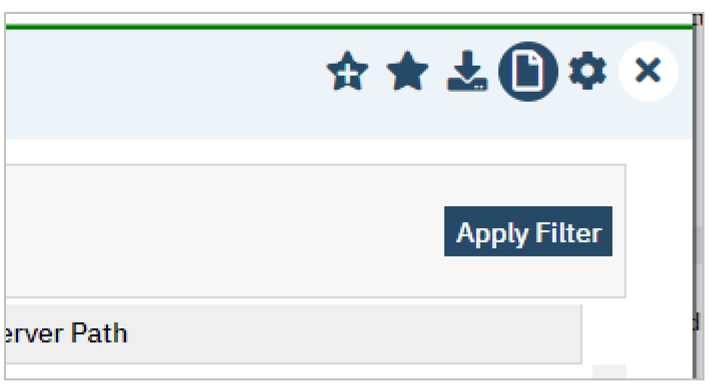
1. Click on Upload button and navigate to the file path where the report is saved



2. Log into SmartCare PROD and Create New report or folder (if necessary)
3. In the form search, choose **Reports (Administration)**

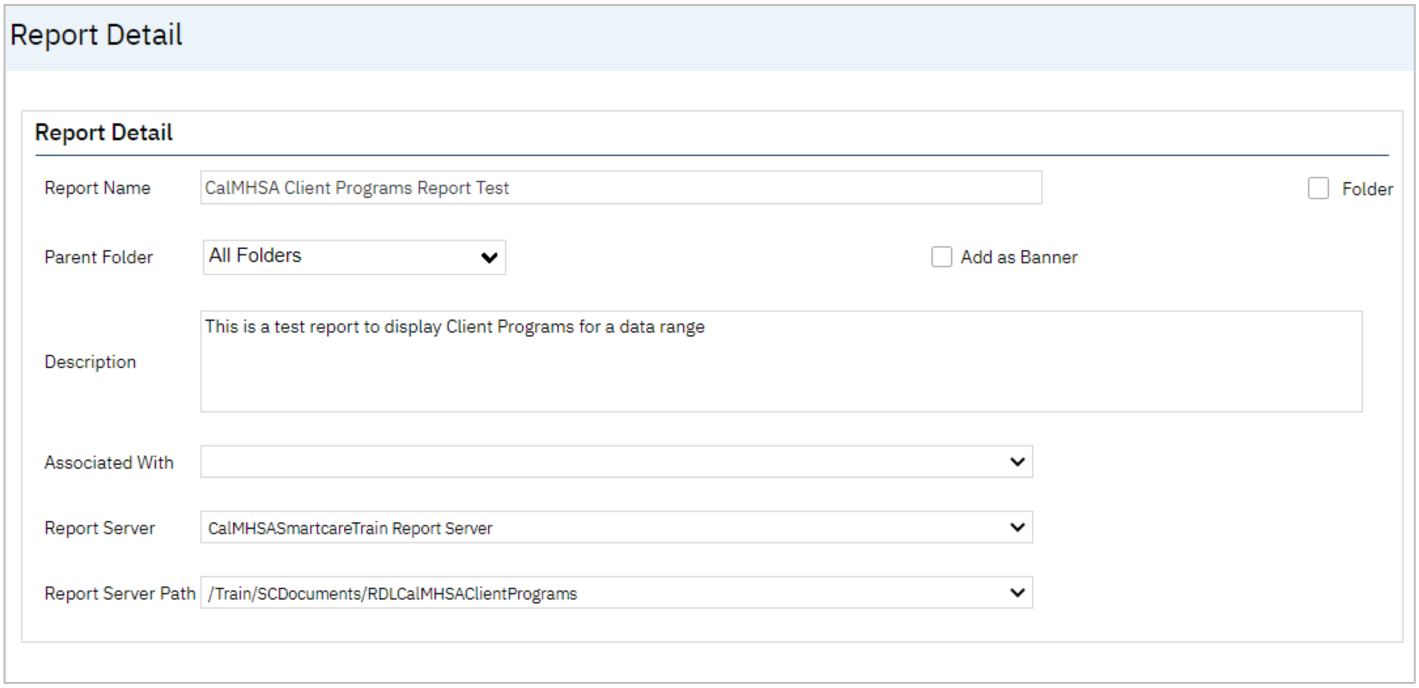


4. Click on the **New** icon to create a new report



5. Enter the **Report Name, description,** choose the **Report Server** and then choose the report from the **Report Server Path** field

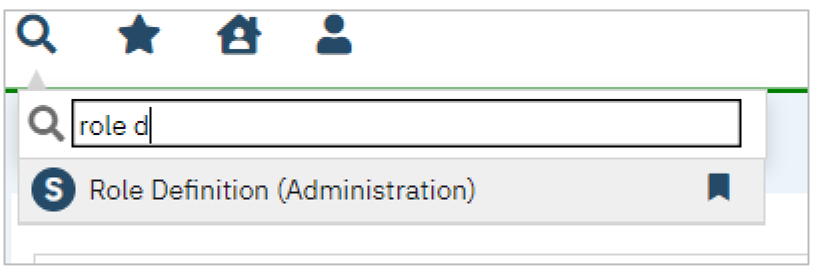
Note – If the report is meant to be a single client report where the user must choose a client prior to opening the report, choose **Client** in the **Associated With** field



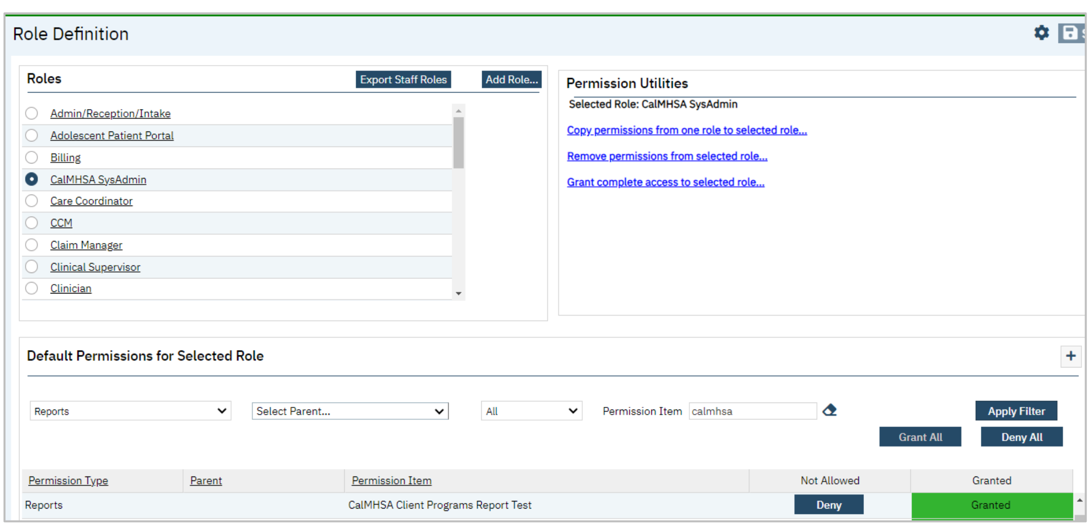
6. Click **Save** in the upper right corner when complete

How to Add Report to User Roles

1. To enable users to access the new report, the applicable user roles must be modified by selecting **Role Definition (Administration)**



2. Select the role in the **Roles** window



3. Choose **Reports** from the left most field in the **Default Permissions for Selected Role** area. Once the report is visible, click on **Granted** instead of Deny. Click **Save** in the upper right corner when complete

4. Note – You can narrow the selections by entering the name of the report in the **Permission Item** field and then click on **Apply Filter**
3. Add to User Roles