

Quick Guide

WHAT THIS IS

Your quick navigational guide for common outpatient medical tasks in Smart Care and users of Ca1MHSA Rx. The ***bolded + italicized text*** are the search term. For more detailed instructions, click on [hyperlinks](#).

WHO THIS IS FOR

Nurses, LVN, Psych Techs, & Medical Assistants.

Smartcare Essentials & Provider Tasks

Tools/Set up

- [Logging in: Reset password](#) or [recover user name](#).
- [Icon Guide](#): Quick reference for Smart Care icons
- [Quick Links](#): Save and access frequently used screens
- [Favorites](#): On list screens, save filtered set of data.
- [Key Phrases](#): Drop custom preset text templates into any textboxes to expedite documentation.

FOR PROVIDER AGENTS ONLY:

- If you are acting on behalf of a prescriber to order non-controlled prescriptions in **Ca1MHSA Rx**, ensure that your prescriber has added you as [provider agents](#).

Review Messages, Tasks & Appointments

Staff Calendar: Review your schedule, [make appointments](#), or block out your [admin time](#).

Dashboard: Use as a quick overview of your daily tasks and to-dos. Focus on these [widgets](#):

- [Appointments of the Day](#): Review your schedule and to start scheduled service note
- **New Alerts / Messages**: Respond to unread messages
- **Assigned Documents**: Review documents needing attention
- [Services Needing Attention](#) & **Warnings/Errors/Flags**: Resolve services and claims not processed correctly
- [Tracking Widget](#): Review outstanding tasks
- **Lab Results Widget**: View unread lab results (if proxy, use dropdown to see all assigned prescribers)

Client Workflows

Search

In your top navigation bar:

1. To find a client → use [client search icon](#)
2. To find a document, screen or report → use **search icon**

WATCH OUTS

Visibility to EHR data is dependent on user permissions, CDAG, and client consent.

Client Overview

[Ca1MHSA 118 Client Medical Facesheet](#): Review a snapshot of the client's pertinent medical history for outpatient settings.

Client Dashboard

Focus on these [widgets](#):

- **Summary**: Client's personal Information.
- **Client Demographics Summary**: Client-specific Preferences and Needs.
- **Active Client Allergy Widget**: Review active allergies
- **Active Client Medication Widget**: Review active, unexpired medications.
- **Client Tracking**: Per program, specific outstanding tasks
- **Treatment Team**: Assigned providers to client
- **Client Programs**: Enrollment Status

Quick Guide

Client Workflows

Vitals

TO REVIEW:

- [CalMHSA 118 Client Medical Facesheet](#) or
- *Service Notes* using *Psych Medical Note* template

TO RECORD:

Flow Sheets → [Vitals/Meaningful Use](#) to trend and input vitals

Documents

[Documents \(Client\)](#): Review in-progress and completed documents, service notes, assessments, screenings, consents, scanned documents.

General Consents: Search for Consents to see available choices, or [ASCMI](#).

TIPS & TRICKS

Use filters and [Favorites](#) to sort/save documents.

Diagnosis & Problems

ALL PROVIDERS

Use [Client Problem List](#) as the all-encompassing list of all client issues. This list is used by other reports/systems.

In addition, you can review a client's Diagnosis Document. This is completed by licensed providers.

TIPS & TRICKS

- Each program's most recent Diagnosis Document will push into the service note's billing diagnosis tab. If consistently missing, ask your licensed providers to complete.

Other Tasks

- [Treatment Team](#): Add/modify providers to client's care team.
- Screening/Assessments: Search by name such as *BQUIP*, *AUDIT C*, *PCL 5*, *GAD &*, *PHQ-9*, *PHQ-A*, *PSC-35*, *C-SSRS*, [AIMS](#), *Safety Plan* and [Shared Treatment Plan](#).
- Alert/Tracking Protocols: Clinics can set up [flags](#), [special populations](#) and [tracking protocols](#) as a way to alert precautions or to-do's.

Allergies & Meds

TO REVIEW:

- [CalMHSA 118 Client Medical Facesheet](#)
- *Active Client Allergy Widget*
- *Active Client Medication Widget*
- [Medication Reconciliation \(Client\)](#): Review medication list and adherence.
- Go to **CalMHSA Rx** to review active/inactive medications, allergies lists and [PDMP](#).

TO ADD/MODIFY:

[CalMHSA Rx](#)

→ *Client Summary*: The e-prescribing system to [capture allergies](#), [add home medications](#), [send prescriptions](#), and [complete prior authorizations](#).
→ *Pharmacy Messages* to reply to pharmacy requests.
→ *Prescription Summary* to set filter and approve pending orders for multiple clients.

ORDERS ON BEHALF OF PRESCRIBERS:

Ordering [permissions](#) are predetermined. If missing role, contact your county admin to submit a ticket to CalMHSA.

Alert prescribers that they have pending prescription to review by sending a message or when prescribers log into CalMHSA Rx. .

Labs & Other Orders

TO REVIEW RESULTS:

- [CalMHSA 118 Client Medical Facesheet](#)
- *Lab Results Widget*
- [CalMHSA 126 Cumulative Lab Report](#): Use this report to view and trend all interfaced lab results
[Client Orders](#)→ [Review tab](#): To record that you have reviewed lab results.

TO ORDER:

Use *Client Orders* → Click on *New* icon to start an order for:

- [Labs \(interface\)](#) and POCT tests
- Non-medication orders (eg nursing, POCT, clinic-specific)

ORDERS ON BEHALF OF PRESCRIBERS:

On the order, complete the Ordering Physician's field. After signing the order, [create a cosignature](#) for prescriber.

Quick Guide

Client Workflows

Service Notes

QUICK DIRECTIONS

1. Open from [Appointments of the Day widget](#) or [Service/Notes](#) to start a note.
2. **Service Tab** → Complete required fields with *, including the [procedure code](#) that best represents services provided.
3. **Note Tab** → Complete relevant sections.
4. **Billing Diagnosis Tab** → Review and confirm diagnoses. Add manually, if missing.
5. **Save/Sign** → Complete the note

TIPS & TRICKS

- Most medical procedure codes use the [Psych Medical note template](#).
- Use [Key Phrases](#) to write efficiently
- Use “Refresh Data” button if objective information is missing.
- Use “Do Not Include in PDF”/“Delete from Note” checkboxes to remove unused sections.
- You can push note’s A/P to [Shared Treatment Plan](#) to reduce re-typing
- Use [CalMHSA 116 Medication Consent Report](#) to see when were previous medication consents captured through service notes that use Psych Medical Note Template.

WATCH OUTS

- Labs Results section: Only displays last 2 months of data
- Vitals section: Only displays last 3 recent entries
- Diagnoses/Problem Lists section → Display data across all programs within same CDAG.
- Auto-filled text will pull from preceding note with same client and same author. Review for outdated information.
- Missing billing diagnosis and unsigned notes are most common delays for claim processing.
- Instructions for [amending](#) or [fixing service errors](#).

Medication Administration

- Complete your service note, using appropriate procedure code.
- Complete [AIMS](#), if applicable.
- Track injection history in **Flowsheet** → **Long-Acting Injectables**.

Referrals for non-Connex users

INTERNAL REFERRALS

In any service note, click on **Disposition tab**, and fill out requested program.

PRIOR AUTHORIZATIONS

[My Service Request List](#): Enter the request info, auth codes, units, and attachments

EXTERNAL REFERRALS

Client Information > [External Referral tab](#): This is for only documentation purposes. Actual referral will still need to be sent to external facility separately (email, fax, mail).

Discharge/Transfer

Choose based on need:

- [CalMHSA Discharge](#) or **Transfer Summary**: Free text, provider-focused; includes active medications
- [CalMHSA 119 Aftercare Discharge Transfer Summary Report](#): Combines objective medical data with text from the CalMHSA Discharge or Transfer Summary
- **Discharge Instructions**: Free text, patient-focused