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# SmartCare

# New User SmartCare

## Training Guide

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The purpose of this guide is to give you a brief introduction to the SmartCare system and give you the tools needed to take and pass the SmartCare Training Exercises.

## Table of Contents

## Searching For a Client

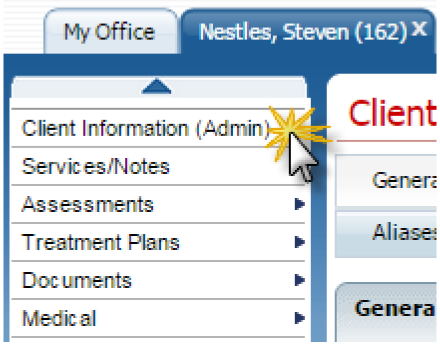
To learn how to search for a client in SmartCare, watch the ***How to Search For a Client*** video located on the Intranet under Reference Material -> IS Information -> Streamline Smartcare -> Video Training or by clicking here.

## Finding Client Information Using the Client Information (Admin) Screen

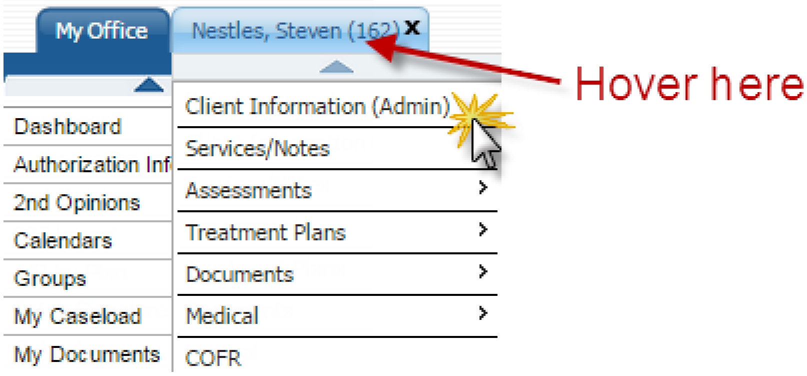
When you first search for and select a client, you will be brought to the Client Information (Admin) screen. This screen houses general information like addresses and phone numbers, demographic information, as well as contacts for the selected client.

If you need to access this screen again after you have navigated away from it, you can do so by:

- **If you are on the client tab:** Clicking the Client Information (Admin) banner on the left side of the screen. **Note:** You will know you are on the client tab when the tab that displays the client name is blue instead of gray (see below screenshot).

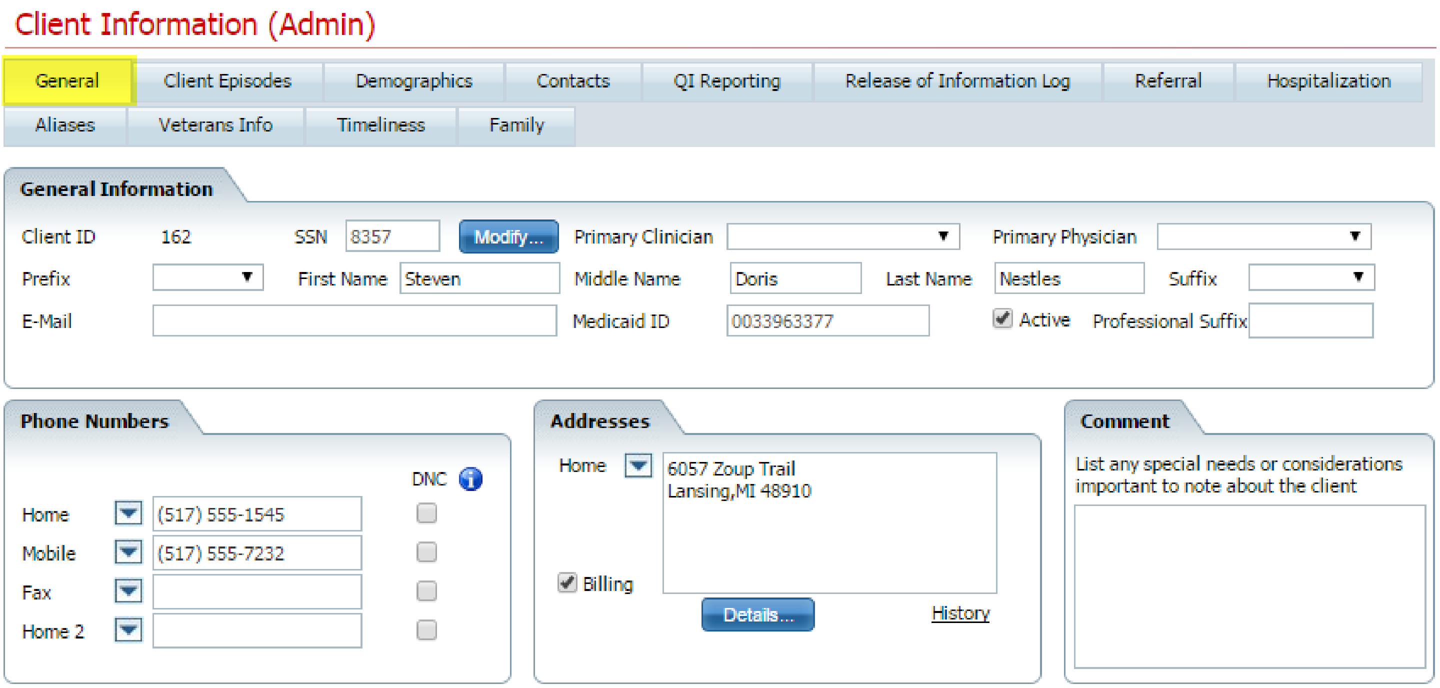



- **If you are on another tab:** Hovering over the client tab will bring up the banner list for the client tab. Click Client Information (Admin).



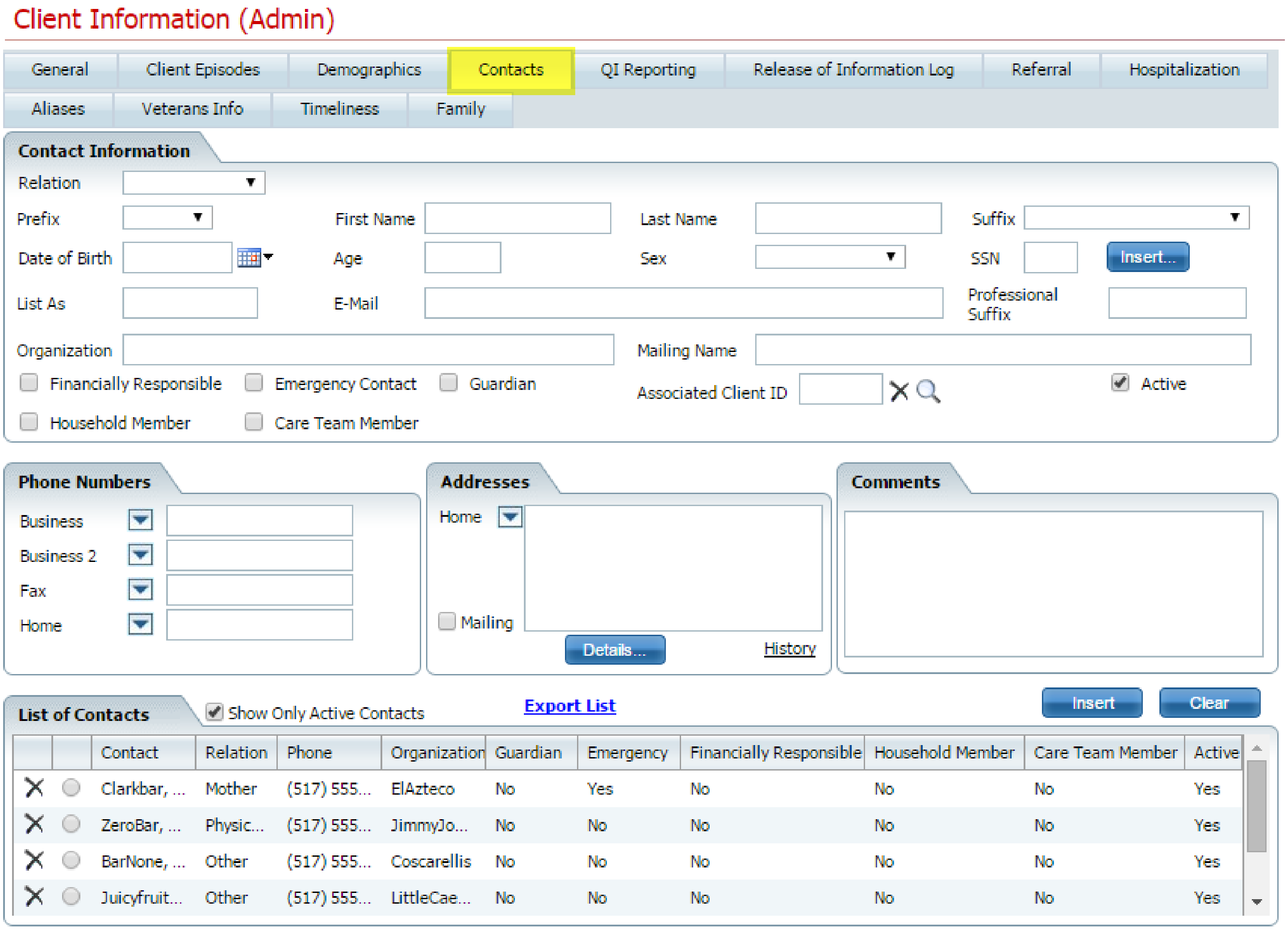
## General Tab

The General tab of the Client Information (Admin) screen displays general information about the client. This information includes their client ID, primary clinician and physician, Medicaid ID (if they are on Medicaid), phone numbers, and addresses.



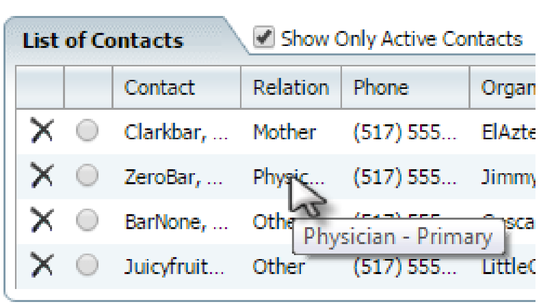
## Contacts Tab

The Contacts tab gives you information about people that have been identified as contacts for this client.

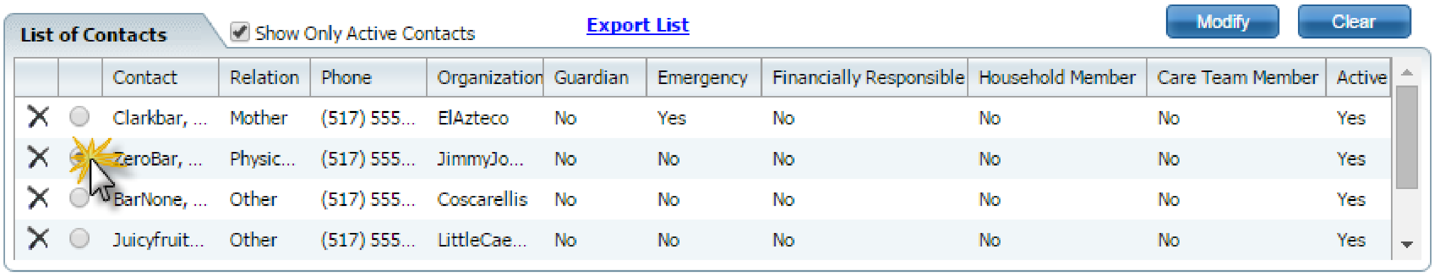



At the bottom of the screen, you will see a section called List of Contacts. This is where all contacts for this client reside. By default, this list only shows active contacts. To view all contacts, including past and no longer relevant ones, uncheck the Show Only Active Contacts checkbox.

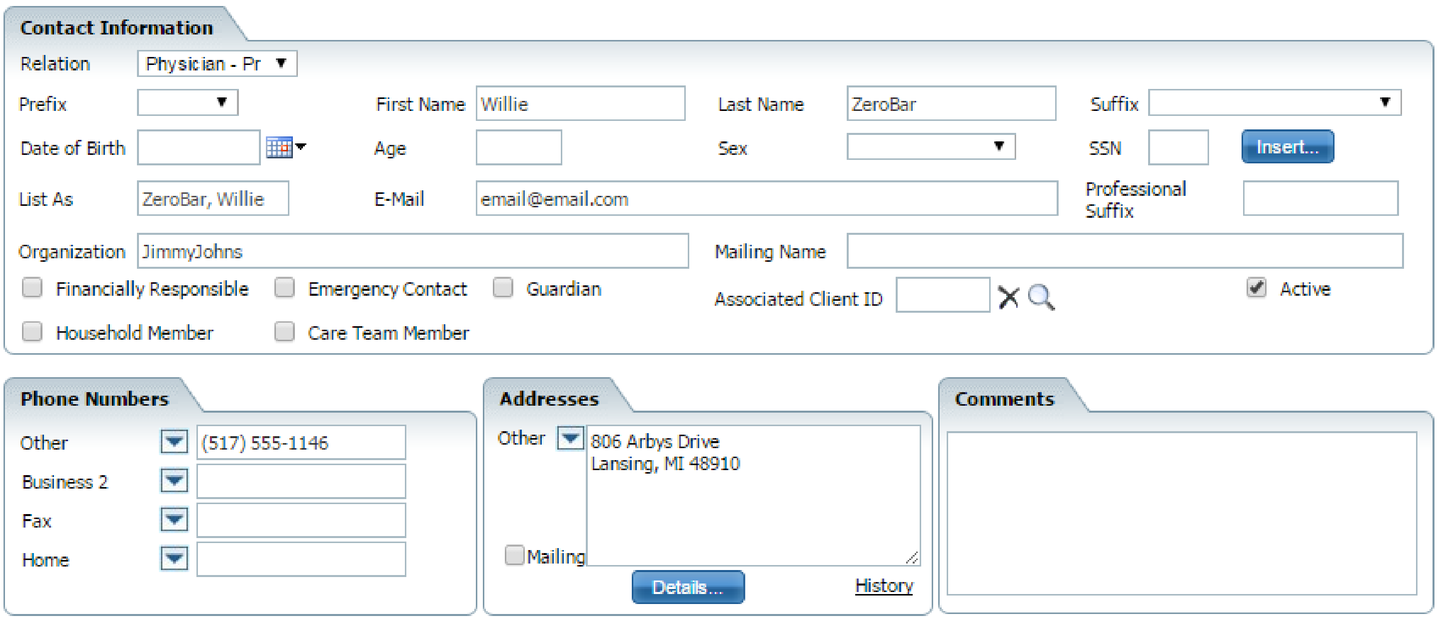
If the information in a field is cut off and shows ellipses (…), you can hover over that field with your mouse to see the full text.



To see the full set of information for that contact, click the radio button to the left of the contact name.




This will cause the contact to open in the sections above.



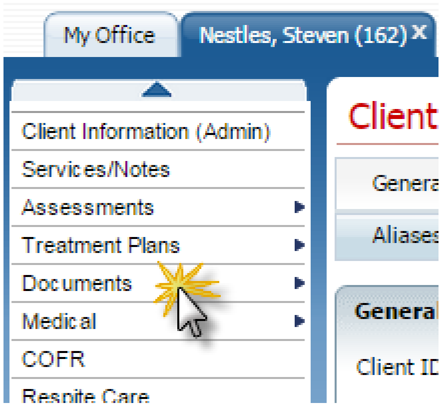

## Other Basic Functions

To learn about other basic functions, please read the Basic functions user manual available on the Intranet under Reference Material -> IS Information -> Streamline Smartcare -> User Manuals or by clicking here.

For the purposes of this training exercise, you will need to read the section titled "Entering into a Grid" and "Unsaved Changes." The rest of the user manual covers other important basics about the SmartCare system and it is highly recommended that you read the manual in its entirety.

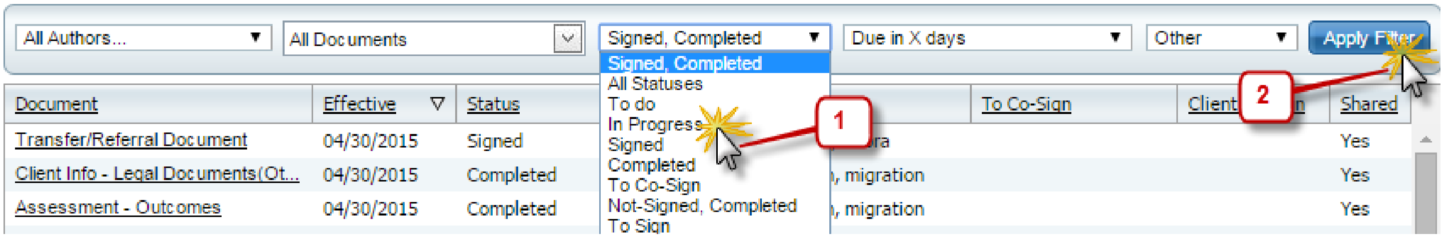
## Viewing Previously Created Documents

Clicking on the Documents banner under the client tab will display a list of all previously created documents for that client. These documents may be authored by many different staff members, but always pertain to the client you have open.

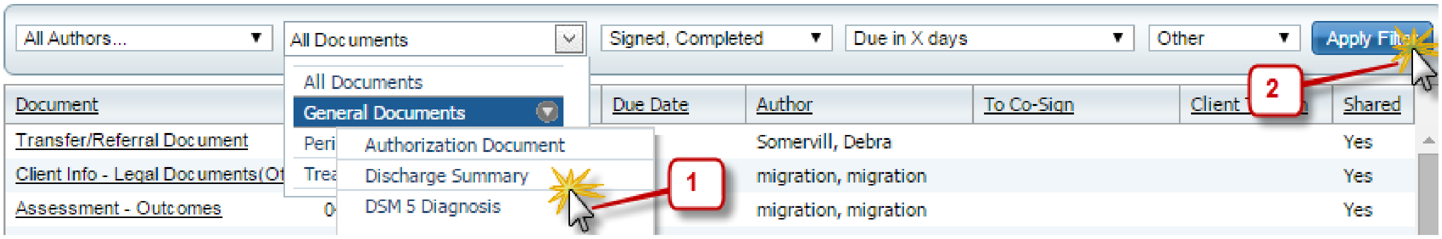



Depending on the client, there could be hundreds of documents available. When that is the case, using the filtering options at the top of the screen will simplify your task of finding a document.

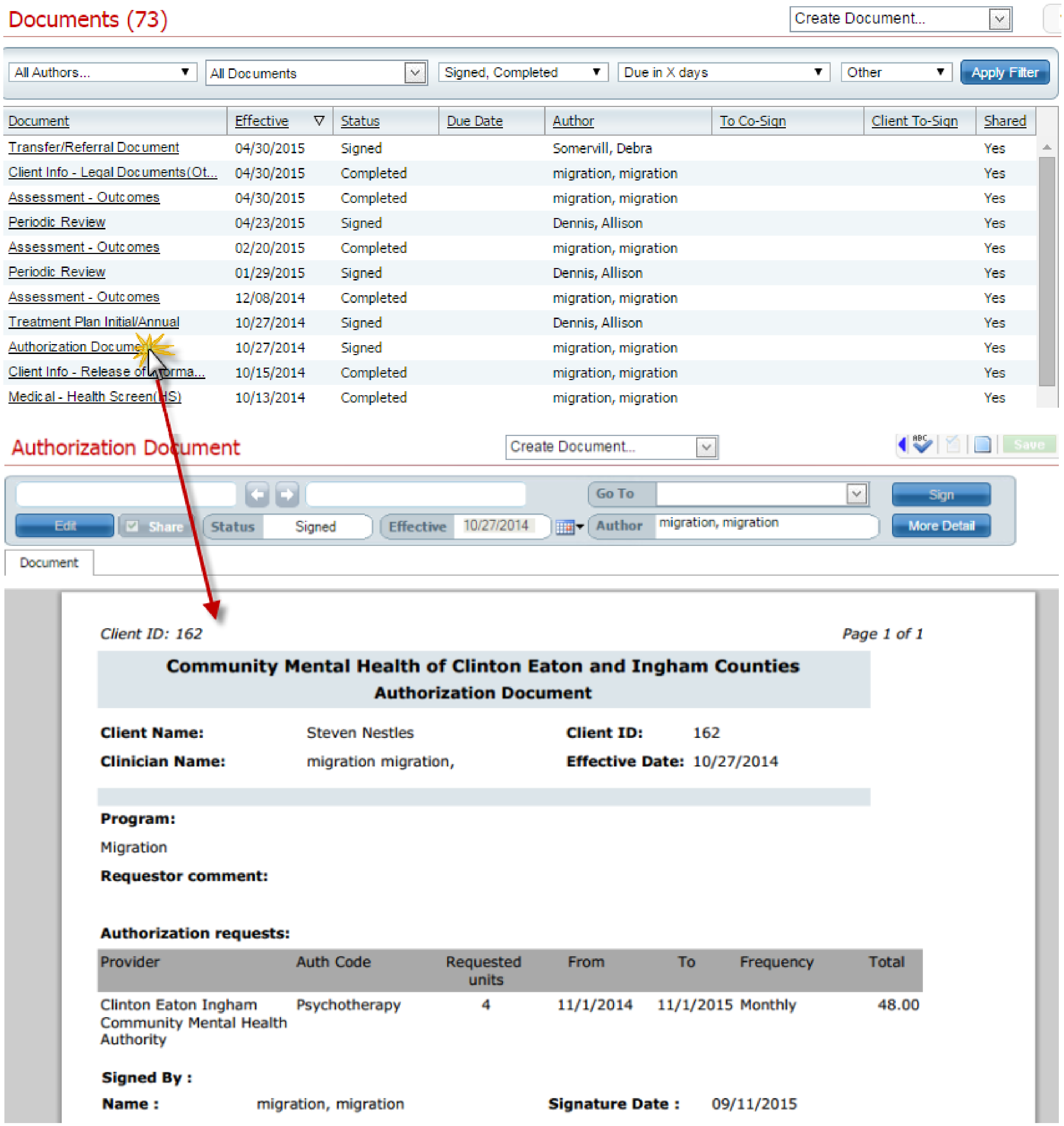

For example, if you wanted to only view documents that were In Progress, you can click on the dropdown that displays the document status ("Signed, Completed" in the screenshot) and select In Progress. Then you click the Apply Filter button to filter the document list.




To filter for only one type of document, you can click the dropdown that displays the document type ("All Documents" in the screenshot), make your selection and click the Apply Filter button.

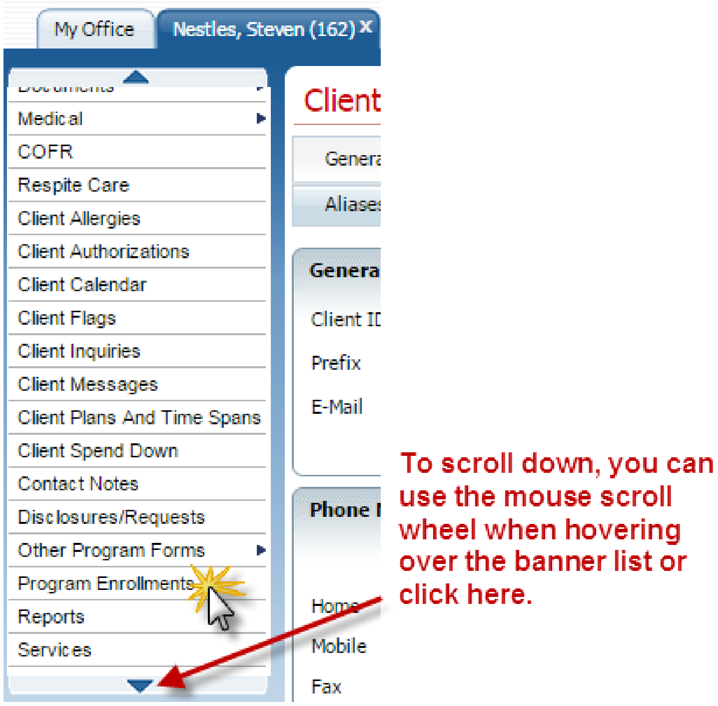


Once you find the document you are looking for, click on the document title to bring the document up for viewing.



## Viewing Program Enrollments

Program enrollments are located on the client tab under the Program Enrollments banner. Depending on your job function, you may need to scroll down a little on the banner list to see this option. Clicking on the banner will open a list of current and past program enrollments for that client.




For more information on entering program enrollments, please view the user manual entitled "Episodes and Enrollments" located on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> User Manuals, or by clicking here.

## Entering Services

To learn about entering services, look at the following training items.

**Service Providers (clinicians, etc)**

1) Watch the video titled "How to Enter a Service" located on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> Video Training or by clicking here.
2) Read the user manual titled "Service Entry for Clinicians" located on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> User Manuals or by clicking here.

**Clerical Staff**

1) Read the user manual titled "Service Entry for Clerical Staff" located on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> User Manuals or by clicking here.

## Additional Resources

There are a lot of additional resources available to you once you start using SmartCare during your day to day operations. These resources are designed to help you through many of the areas of SmartCare in a step by step fashion.

**User Manuals** – User manuals are available on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> User Manuals or by clicking here.

**Video Training** – Video trainings are available on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> Video Training or by clicking here.

**Supporting Documents** – Supporting documents are available on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare -> Supporting Documents or by clicking here.

**Practice System** – A practice system is available to allow you to work on your SmartCare skills without the worry of affecting live data. You can access the practice system by navigating to http://streamline-train.ceicmhb/CEIPracticeSmartcare/ or by clicking here.

## Support Plan

When you start working with SmartCare you will most likely encounter questions. If you do, follow the steps below to get the answers you need.

1) Look on the Intranet under Reference Materials -> IS Information -> Streamline Smartcare to see if there is a user manual or video training that covers your question.
2) Talk to your colleagues. It's likely that they have already had the same question and know the answer.
3) If your colleagues can't answer your question, you can contact the Business Analysts at isba@ceicmh.org.