



Community
MENTAL HEALTH
CLINTON • EATON • INGHAM

SmartCare

New User SmartCare Training Guide

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	2
Finding Client Information Using the Client Information (Admin) Screen.....	2
General Tab.....	3
Contacts Tab.....	4
Other Basic Functions	5
Viewing Previously Created Documents	6
Viewing Program Enrollments.....	8
Entering Services.....	8
Additional Resources	9
Support Plan	9

Searching For a Client

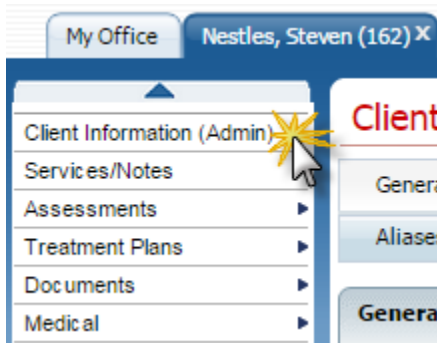
To learn how to search for a client in SmartCare, watch the *How to Search For a Client* video located on the Intranet under Reference Material -> IS Information -> Streamline Smartcare -> Video Training or by clicking [here](#).

Finding Client Information Using the Client Information (Admin) Screen

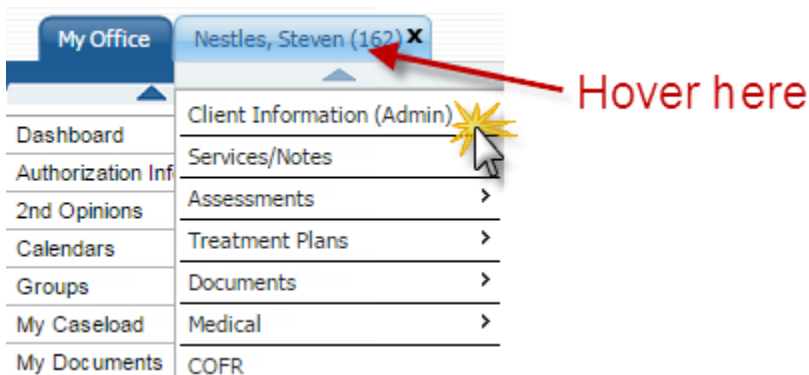
When you first search for and select a client, you will be brought to the Client Information (Admin) screen. This screen houses general information like addresses and phone numbers, demographic information, as well as contacts for the selected client.

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.

Client Information (Admin)

General	Client Episodes	Demographics	Contacts	QI Reporting	Release of Information Log	Referral	Hospitalization
Aliases	Veterans Info	Timeliness	Family				

General Information
Client ID: 162 SSN: 8357 [Modify ...](#) Primary Clinician: Primary Physician:
Prefix: First Name: Steven Middle Name: Doris Last Name: Nestles Suffix:
E-Mail: Medicaid ID: 0033963377 Active Professional Suffix:

Phone Numbers
Home: (517) 555-1545 DNC
Mobile: (517) 555-7232
Fax:
Home 2:

Addresses
Home: 6057 Zoup Trail
Lansing, MI 48910
 Billing [Details...](#) [History](#)

Comment
List any special needs or considerations important to note about the client

Contacts Tab

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

Client Information (Admin)

Contact Information

Relation Prefix First Name Last Name Suffix

Date of Birth Age Sex SSN [Insert...](#)

List As E-Mail Professional Suffix

Organization Mailing Name

Financially Responsible Emergency Contact Guardian Household Member Care Team Member

Associated Client ID Active

Phone Numbers

Business Business 2 Fax Home

Addresses

Home Mailing [Details...](#) [History](#)

Comments

List of Contacts Show Only Active Contacts [Export List](#) [Insert](#) [Clear](#)

	Contact	Relation	Phone	Organization	Guardian	Emergency	Financially Responsible	Household Member	Care Team Member	Active
X	Clarkbar, ...	Mother	(517) 555...	ElAzteco	No	Yes	No	No	No	Yes
X	ZeroBar, ...	Physic...	(517) 555...	JimmyJo...	No	No	No	No	No	Yes
X	BarNone, ...	Other	(517) 555...	Coscarellis	No	No	No	No	No	Yes
X	Juicyfruit...	Other	(517) 555...	LittleCae...	No	No	No	No	No	Yes

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.

List of Contacts Show Only Active Contacts

	Contact	Relation	Phone	Organ
X	Clarkbar, ...	Mother	(517) 555...	ElAzte
X	ZeroBar, ...	Physic...	(517) 555...	Jimmy
X	BarNone, ...	Other	(517) 555...	Cosca
X	Juicyfruit...	Other	(517) 555...	Littlec

Physician - Primary

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

	Contact	Relation	Phone	Organization	Guardian	Emergency	Financially Responsible	Household Member	Care Team Member	Active
<input type="radio"/>	Clarkbar, ...	Mother	(517) 555...	ElAzteco	No	Yes	No	No	No	Yes
<input checked="" type="radio"/>	ZeroBar, ...	Physic...	(517) 555...	JimmyJo...	No	No	No	No	No	Yes
<input type="radio"/>	BarNone, ...	Other	(517) 555...	Coscarellis	No	No	No	No	No	Yes
<input type="radio"/>	Juicyfruit...	Other	(517) 555...	LittleCae...	No	No	No	No	No	Yes

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

Contact Information
Relation:
Prefix:
Date of Birth:
List As:
Organization:
 Financially Responsible Emergency Contact Guardian Household Member Care Team Member
Associated Client ID: Active

Phone Numbers
Other:
Business 2:
Fax:
Home:

Addresses
Other:

 Mailing
 [History](#)

Comments

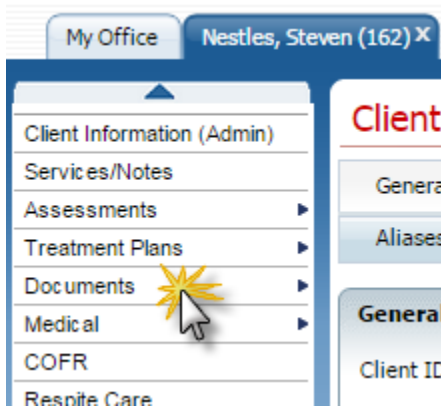
Other Basic Functions

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](#).

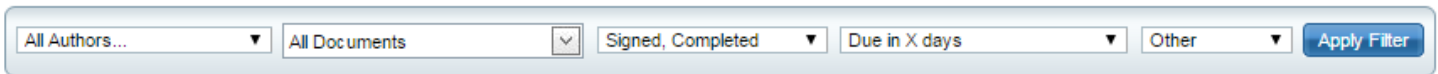
For the purposes of this training exercise, you will need to read the section titled “Entering into a Grid” and “Unsaved Changes.” The rest of the user manual covers other important basics about the SmartCare system and it is highly recommended that you read the manual in its entirety.

Viewing Previously Created Documents

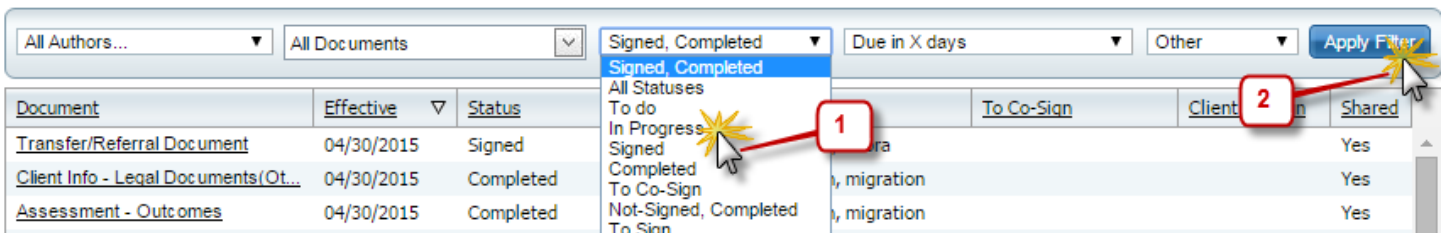
Clicking on the Documents banner under the client tab will display a list of all previously created documents for that client. These documents may be authored by many different staff members, but always pertain to the client you have open.



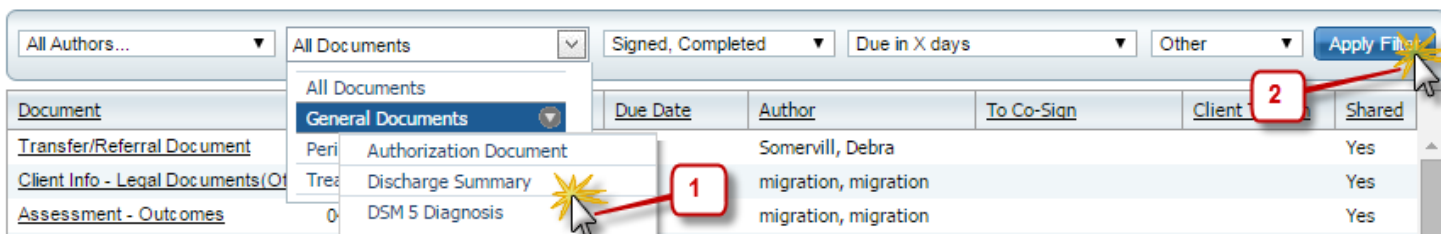
Depending on the client, there could be hundreds of documents available. When that is the case, using the filtering options at the top of the screen will simplify your task of finding a document.



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.

Documents (73)

Create Document...

Document	Effective	Status	Due Date	Author	To Co-Sign	Client To-Sign	Shared
Transfer/Referral Document	04/30/2015	Signed		Somervill, Debra			Yes
Client Info - Legal Documents/Ot...	04/30/2015	Completed		migration, migration			Yes
Assessment - Outcomes	04/30/2015	Completed		migration, migration			Yes
Periodic Review	04/23/2015	Signed		Dennis, Allison			Yes
Assessment - Outcomes	02/20/2015	Completed		migration, migration			Yes
Periodic Review	01/29/2015	Signed		Dennis, Allison			Yes
Assessment - Outcomes	12/08/2014	Completed		migration, migration			Yes
Treatment Plan Initial/Annual	10/27/2014	Signed		Dennis, Allison			Yes
Authorization Document	10/27/2014	Signed		migration, migration			Yes
Client Info - Release of Informa...	10/15/2014	Completed		migration, migration			Yes
Medical - Health Screen (HS)	10/13/2014	Completed		migration, migration			Yes

Authorization Document

Create Document...

Share
 Signed
 10/27/2014
 migration, migration

Document

Client ID: 162 Page 1 of 1

Community Mental Health of Clinton Eaton and Ingham Counties
Authorization Document

Client Name: Steven Nestles **Client ID:** 162
Clinician Name: migration migration, **Effective Date:** 10/27/2014

Program:
 Migration

Requestor comment:

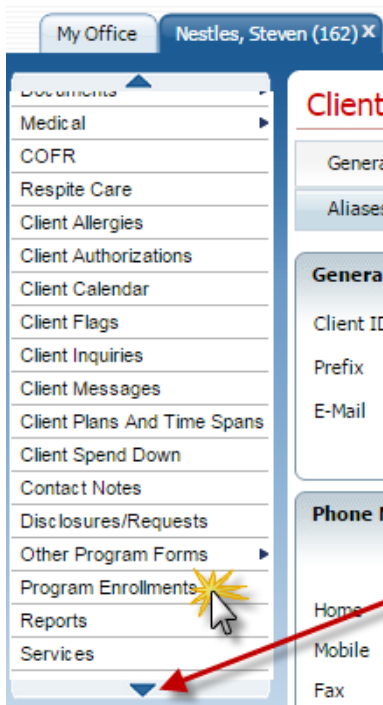
Authorization requests:

Provider	Auth Code	Requested units	From	To	Frequency	Total
Clinton Eaton Ingham Community Mental Health Authority	Psychotherapy	4	11/1/2014	11/1/2015	Monthly	48.00

Signed By :
Name : migration, migration **Signature Date :** 09/11/2015

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.