



**Community**  
MENTAL HEALTH  
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# SmartCare

## Basic Functions

### User Guide

This guide will provide information on how to perform some basic functions in SmartCare. For general navigation see the General Navigation video located [here](#).

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# SmartCare Screen Information

This is a navigation filter. You have the choice to view either Quicklinks for My Office or Client or both depending on what you select for the navigation filter.

This is the My Office Quicklink. It provides general information (not client specific).

This is the Client Quicklink: Click on it to see the client quicklinks. Client Quicklinks relate to the client selected.

This screen is the Dashboard. It is found in the My Office Quicklink.

If there are Unsaved Changes, they would display here

Icons

These are Quicklinks. Since the My Office Quicklink is selected, these are My Office Quicklinks. Clicking on a Quicklink opens a screen or List Page. A white arrow next to a Quicklink indicates there is a Flyout. Hover over the Quicklink to see the Quicklinks.

This is a Widget. Widgets are found on the Dashboard. They provide helpful information. Underlined items are links to navigate to the referenced screen.

Notes	Assessments	Tx Plan	Tx Add-Rev	Speech Eval	Asthma Cont	All
In Progress	0	1	0	0	0	1
To Sign	0	0	0	0	0	0
To Co-Sign	0	0	0	0	0	0
Coming Due	120 Days	18	18	25	0	61
Overdue		8	10	0	0	18

Name	Time	Status
	09:00 AM	Scheduled
	10:00 AM	Scheduled
	11:00 AM	Scheduled
	01:00 PM	Scheduled
	02:00 PM	Scheduled
	02:30 PM	Scheduled
	03:00 PM	Scheduled

## Navigation Filters

### Navigation Filters and QuickLinks

There is a choice to view the QuickLinks list/s for either My Office or the Client record, or both, depending on what you select in the Navigation Filters. The furthest icon will open QuickLinks for 'All' navigation which includes My Office, the Client record, and Providers or Administration, etc. for staff with certain roles.

Client

My Office

All

My Office

Client

SmartLinks

Auth Documents

My Services

Click on > to expand the menu of QuickLinks and include all the flyout menu options

Note: Make sure you have a client record open before you try to click on a Client QuickLink.

The screenshot shows the SmartCare interface. At the top, there is a navigation bar with the SmartCare logo, a search icon, a star icon, and a user profile icon for 'AAATestcase, Tony (1) @'. Below the navigation bar, there is a sidebar on the left with 'Client' and 'SmartLinks' options. The main content area displays a list of assessment options for a client. The list is organized into two columns: the left column contains assessment categories, and the right column contains the specific assessment names.

Assessments		
Assessments	>	ASAM Continuum Assessment
BH-TEDS	>	Assessment Annual / Initial
Client Dashboard		Asthma Control Test
Client Information	>	AUDIT
Contact Notes	>	Autism Evaluation
Documents	>	BCU Assessment
Medical	>	Columbia Suicide Severity Rating Scale
Outcome Tools	>	Comp Func Assessment
Program Forms	>	Jail Service Screening
Services	>	OBRA Assessment
Treatment Plans	>	OT Evaluation
		Skill Building/Voc Assessment
		Speech Evaluation

## Searching for a Client

There are multiple methods to search for a client.

### Search or Open a Client already in the system

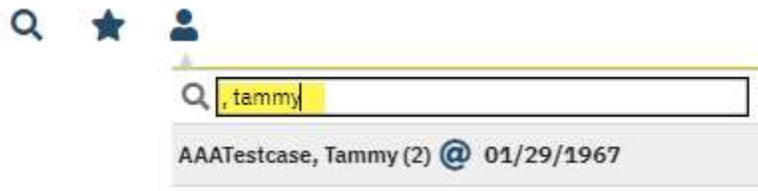
The screenshot shows the search interface. At the top, there is a search bar with the text 'aaa' entered. Below the search bar, a dropdown list displays three client records. The first record, 'AAATestcase, Tammy (2) @ 01/29/1967', is highlighted in bold. The second record, 'AAATestcase, Tommy (3) @ 10/01/1990', is also highlighted in bold. The third record, 'AAATestcase, Tony (1) @ 10/01/2015', is not highlighted. A red-bordered box contains the following text:

As a name is entered, the client dropdown begins to fill. Clients you have access to will be in **bold** at the top.

**Important: Client to select the correct client. Do not just hit enter, or you could enter the information for a wrong client**

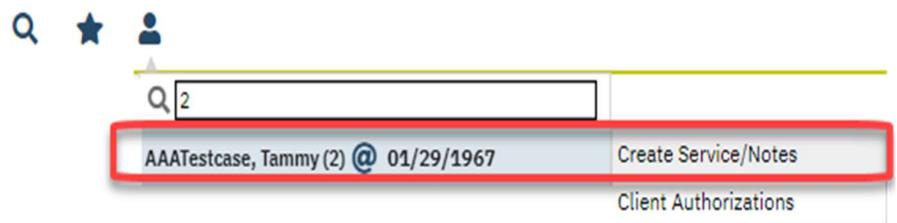
You will be able to type the client name\* or Client ID directly into the dropdown menu to search, *without having to open the Client Search Window!* (Note: You will still need to use the Client Search screen to create new Inquiries.)

\*You can type Last name, First name (separate by a comma), or you can search for clients with a specific first name by typing just the first name preceded by a comma, “,first name.” If you have a caseload, clients on your caseload (meeting the criteria of your search) will appear in **bold** at the top of the list.



**Important:** Wait for the list to load and click on the desired client or use the down arrow to select the correct client. Do not just hit enter. If the list is still loading, you may open the wrong client. As always, verify that you are on the correct client record before entering information.

As you scroll to the **correct** client name using your mouse or the “down” arrow, a flyout sub-menu displays to the left of the client. Click on that “Create Service/Notes” to begin a new Service Note for that client.

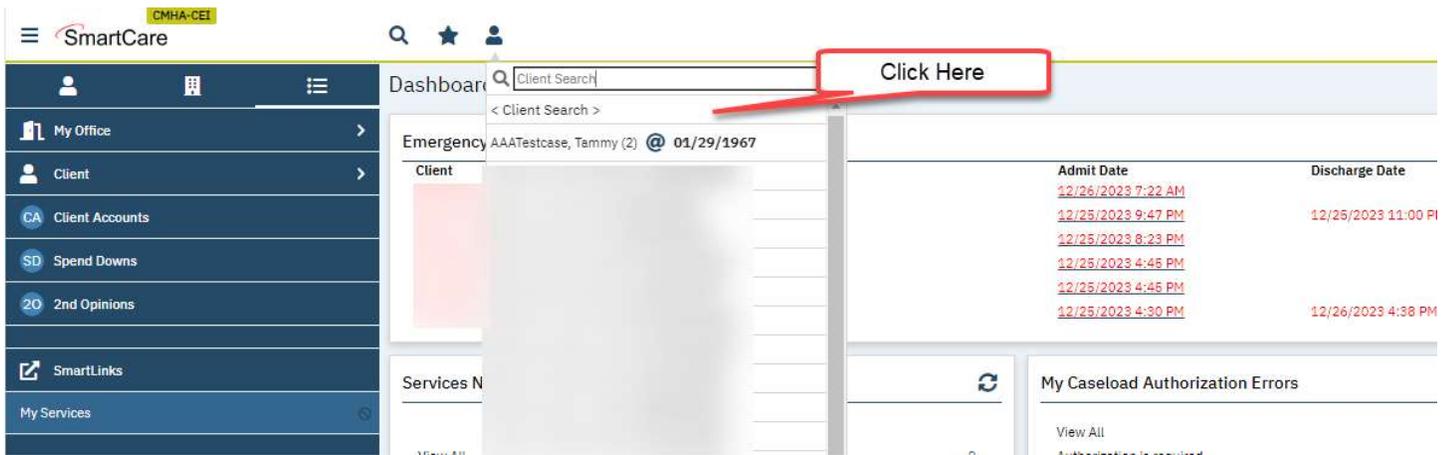


For additional information about searching for a client, please review this [video](#).

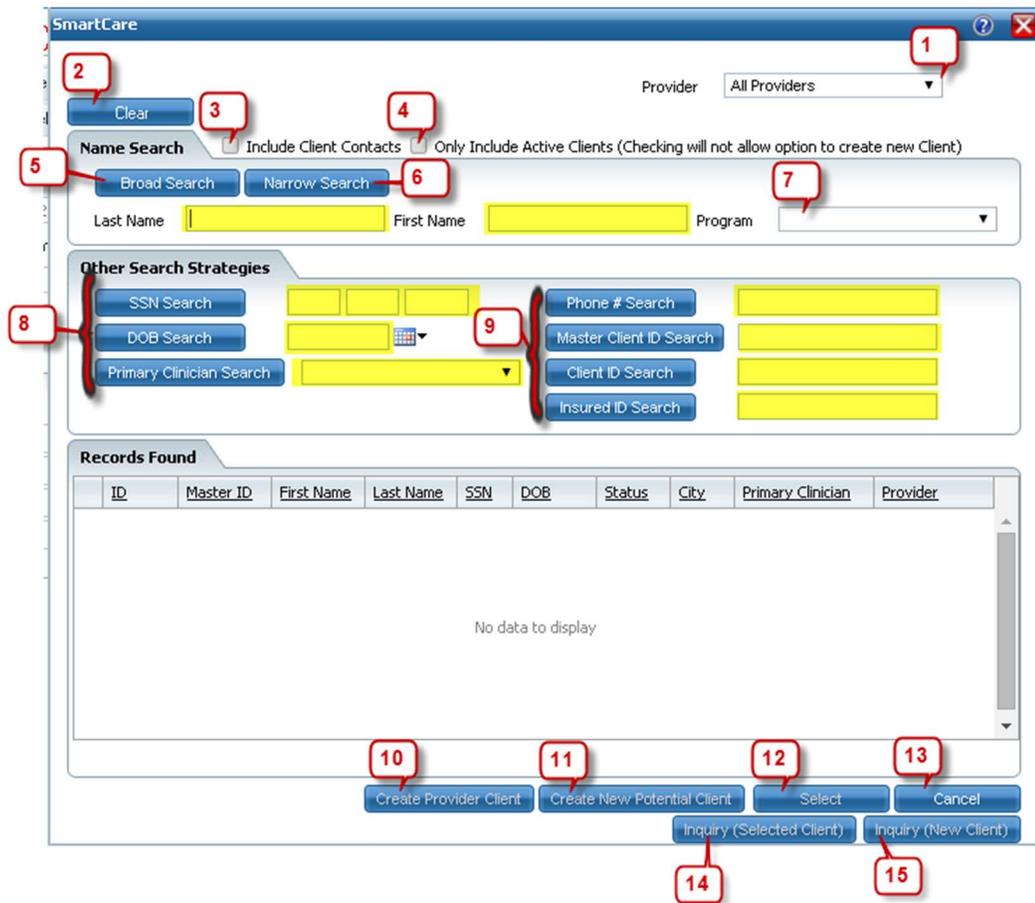
## Use the full Search box

Use the full Search box to search for an Inactive client. The full search box must also be used to create an Inquiry or a new Client.

In the blue bar at the top of the screen, click the drop down that says “**Open this Client**” and then click the <**Client Search**> option.



The Client search window will appear. Enter your search criteria and click the appropriate search button.



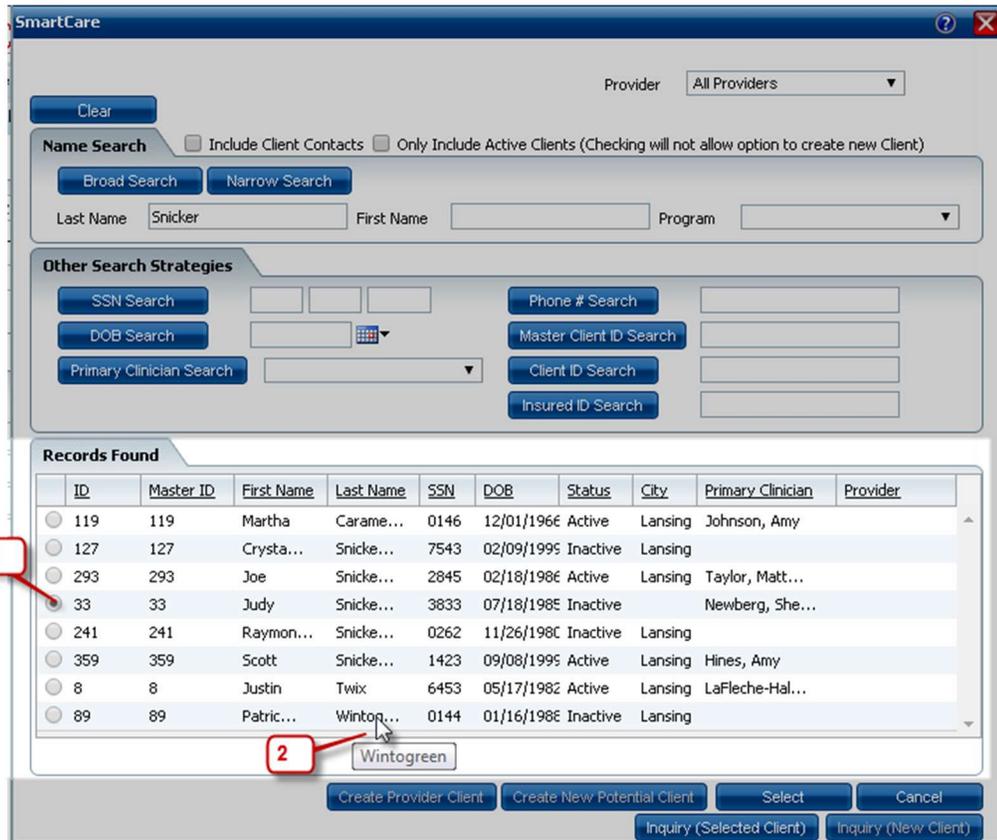
Item	Description
------	-------------

1	Provider Drop Down	For most CMHA-CEI staff, this value should be left as <b>All Providers</b> . Only staff that work with provider claims would need to change this value when searching for a client.
2	Clear Button	The clear button will clear all search criteria fields and allow you to perform another search.
3	Include Client Contacts	If this box is checked, not only with results display for matching clients, but matching client contacts as well.
4	Only Include Active Clients	If this box is checked, only clients that have the active box checked on the <b>General</b> tab of <b>Client Info (Admin)</b> will be included in the results.
5	Broad Search	Searches Client Names and Client Aliases that are indicated as searchable. Does not require an exact match for a record to be returned.
6	Narrow Search	Searches Client Names and Client Aliases that are indicated as searchable. Requires an exact match for a record to be returned.
7	Program	This option limits search results to clients enrolled in a specific program.
8	SSN, DOB, Primary Clinician	Clicking on one of these buttons will perform a search based solely on the information entered relating to the button clicked. i.e., clicking SSN search will display results that match the SSN search criteria, regardless of what other search information has been completed.

9	Phone #, Master Client ID, Client ID, Insured ID	Clicking on one of these buttons will perform a search based solely on the information entered relating to the button clicked. i.e., clicking Phone # search will display results that match the Phone # search criteria, regardless of what other search information has been completed.
10	Create Provider Client	Clicking this button will create a new client that only receives claims, and not direct services from CMHA-CEI staff.
11	Create New Potential Client	Clicking this button will create a new client in the system that receives direct services from CMHA-CEI staff.
12	Select	Clicking on this button will open the client record that is selected.
13	Cancel	Clicking on this button will cancel your search and return you to the previous screen.
14	Inquiry (Selected Client)	Clicking on this button will create a new Inquiry form for the selected client.
15	Inquiry (New Client)	Clicking on this button will create a new Inquiry form for a new client. You must perform a Broad Name, SSN, and DOB search for this button to be active.
<b>Yellow Highlighted Fields</b>	Text boxes to enter search criteria	These text boxes are used for entering specific search criteria.

**Note:** An “alias” is an alternative name for a client, such as a maiden name. Alias information is found on the **Client Information** screen, on the **Aliases** tab.

Search results are displayed in the Records Found section.



Item	Description
1	Selection Indicator
2	Mouse Hover

In the example in step 3 above, a **Broad Search** was performed with a Last Name entered of **Snicker**. All client records and client aliases with that text in the last name field is returned. Click the **Select** button to open the selected client record.

**A thorough search is important to avoid creating duplicate clients.** Do a number of searches using only one or two pieces of information at a time. A good search practice would be to follow the order listed below:

- Broad Name Search – Last Name Only
- Broad Name Search – Last Name and First Name
- Broad Name Search – Last Name and First Initial
- SSN Search
- DOB Search

## Entering into a Grid

Several screens in SmartCare use Grids. A Grid screen displays a grid with multiple records (usually at the bottom of the screen), with a detail section above. If a record is selected in a grid, the information for that record will display in the detail section. The Contacts tab in the Client Info (Admin) screen is an example of a grid.

Client Information

General Client Episodes Demographics **Contacts** Release of Information Log Hospitalization Aliases Timeliness Family

Custom Fields **Detail Section**

**Contact Information**

Relation: Aunt  
Prefix: [dropdown]  
Date of Birth: 12/01/1960  
List As: DOE, JANE  
Credentials: [dropdown]  
Organization: [text]  
 Financially Responsible  Emergency Contact  Guardian  
 Household Member  Care Team Member  Healthcare Decision Maker  
Patient Portal ID: [text]  
Buttons: Create, Reset

First Name: JANE  
Age: 63 Years  
E-Mail: [text]  
Department: [text]  
Mailing Name: [text]  
Associated Client ID: [text] X Q  
 Active

Last Name: DOE  
Suffix: [dropdown]  
Sex: Female  
SSN: 5678  
Buttons: Add to Frequent Contacts, Frequent Contact Search, Insert..., Assign Treatment Team Role

**Phone Numbers**  
 Same As Client Phones  
Mobile: (517) 555-1222  
Home: [text]  
Business: [text]  
Home 2: [text]

**Addresses**  
 Same As Client Address  
Home: 130 Smith Rd  
Lansing, MI 48911-1510  
 Mailing  
Buttons: Details..., History

**Comments**  
Aunt is the guardian

**List of Contacts**  Show Only Active Contacts [Export List](#) **Grid Section** [Modify](#) [Clear](#)

	Contact	Relation	Phone	Organization	Guardian	Emergency	Financially Responsible	Household Member	Care Team Member	Active	Healthcare Decision Maker
X	Helpme, Joe	Physician - Not Primary			No	No	No	No	Yes	Yes	No
X	ME, Doe Ray	Physician - Not Primary			No	No	No	No	Yes	Yes	No
X	DOE, JANE	Aunt	(517) 555-1222		Yes	Yes	No	No	No	Yes	No

Grids almost always have Insert/Modify and clear buttons

Notice that only some of the fields from the Detail section display in the Grid. You will need to select the record in the Grid and view in the Detail section to see all fields.

Grid screens require extra care because there is an additional step involved in adding or modifying information in the grid. Information must be added or changed in the grid by clicking on the Insert or Modify button before clicking Save.

*If you click on Save before selecting Insert or Modify, your information will be lost. Also, information on this screen will not appear in Unsaved Changes until you have clicked on Insert or Modify; if you switch screens before clicking the Insert or Modify button, your information will be lost.*

## Inserting into a Grid:

If the detail section is blank (i.e. no record is selected in the Grid) the button next to Clear will be 'Insert.'

The screenshot shows the 'Client Information' interface with the 'Contacts' tab selected. The 'List of Contacts' grid is visible at the bottom, and the 'Insert' button is highlighted in yellow. The grid contains the following data:

Contact	Relation	Phone	Organization	Guardian	Emergency	Financially Responsible	Household Member	Care Team Member	Active	Healthcare Decision Maker
<input checked="" type="radio"/> Bob, Taco	Sister	0-123		No	No	No	No	No	Yes	No
<input checked="" type="radio"/> Grace, Laura Jane	Legal Guardian	(555) 455-4545		Yes	No	No	No	No	Yes	No
<input checked="" type="radio"/> AAATestcase, Tammy	Self	(51) 711-1111		No	Yes	No	No	No	Yes	No

1. Enter the desired information into the Detail section.
2. Click on the Insert Button
3. Click on Save.
  - a. In this particular screen, the Save button is grayed out until you have inserted into the Grid.
  - b. In most Grid screens, the Save button is always available, so make sure that you click Insert before clicking Save.

If the Detail section displays information (i.e. a radio button in the Grid is selected), the button next to Clear will be 'Modify.'

## Client Information

**General** Client Episodes Demographics **Contacts** Release of Information Log Hospitalization Aliases Timeliness Family

Custom Fields

### Contact Information

Relation: Aunt

Prefix:  First Name: JANE Last Name: DOE Suffix:

Date of Birth: 12/01/1960  Age: 63 Years Sex: Female SSN: 5678

List As: DOE, JANE E-Mail:

Credentials:  Department:  Professional Suffix:

Organization:  Mailing Name:

Financially Responsible  Emergency Contact  Guardian  Household Member  Care Team Member  Healthcare Decision Maker

Associated Client ID:     Active

Patient Portal ID

### Phone Numbers

Same As Client Phones

Mobile:  (517) 555-1222

Business:

Business 2:

Fax:

### Addresses

Same As Client Address

Home:  130 Smith Rd  
Lansing, MI 48911-1510

Mailing  [History](#)

### Comments

Aunt is the guardian

1

### List of Contacts

Show Only Active Contacts [Export List](#)

Contact	Relation	Phone	Organization	Guardian	Emergency	Financially Responsible	Household Member	Care Team Member	Active	Healthcare Decision Maker
<input checked="" type="checkbox"/> Helpme, Joe	Physician - Not Primary			No	No	No	No	Yes	Yes	No
<input checked="" type="checkbox"/> ME, Doe Ray	Physician - Not Primary			No	No	No	No	Yes	Yes	No
<input checked="" type="checkbox"/> DOE, JANE	Aunt	(517) 555-1222		Yes	Yes	No	No	No	Yes	No

If you are trying to create a new record, you must use the Insert button. If you make changes and click Modify, you are changing the existing record, not adding a new one. (e.g. if a Grandparent contact is displayed and you want to add an Aunt, entering the information and clicking Modify will change the Grandparent to the Aunt; the Grandparent information will be gone.)

How can you get the Insert button to show instead of Modify?

1. Click the Clear button.
  - a. This will de-select the record in the Grid, clearing out the information in the Detail section. (It does not delete the item from the grid. See Clearing a Grid in this document.)
  - b. This will change the Modify button to Insert.
2. Then follow the steps for inserting if the Detail section is blank to create your new record.

Note: The Contacts screen has an extra Insert button next to SSN. This Insert button pertains only to the SSN field. To Insert into the Grid, use the Insert button next to the Clear button.

## Modifying a Grid:

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To modify an existing record, click on the radio button next to the record in the Grid. The information will display in the Detail section. Make any necessary changes and click the Modify button. Then Save.

## Clearing a Grid:

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The Clear button can be used for two different reasons:

1. If you started to enter information into the Detail section and then decided you did not want that information added or modified—click the Clear button to clear out the Detail section. Any changes you made will be lost because they were never saved to the Grid.
2. If the Modify button is showing and you want to Insert a record. Click the Clear button to clear the Detail section. This will not delete the record, because the information is stored in the grid; Clear just clears the display.

## Deleting a Record from a Grid:

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If a record was entered into the Grid in error, click on the X next to the item to delete it.



	Contact	Relation	Phone	Organization	Guardian	Emergency	Financially Responsible	Household Member	Care Team Member	Active
X	Marsbar, ...	Grand...	(517) 555...	DeLucas	No	Yes	No	No	No	Yes
X	Kinder, C...	Mother	(517) 555...	PizzaHut	No	No	No	No	No	Yes
X	Dots, Craig	Physici...	(517) 555...	Pistachios	No	No	No	No	No	Yes

Only records entered in error should be deleted. To retain the history of accurate information, you can make the item inactive or end-date it (depending on the screen.)

## Unsaved Changes

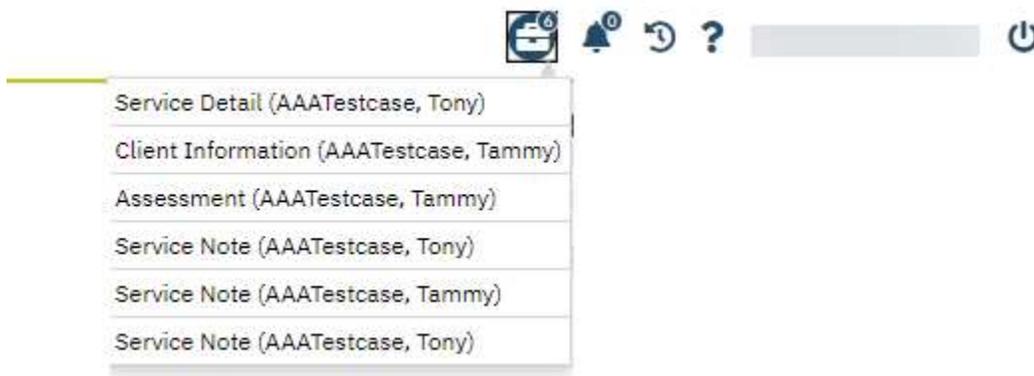
### How Unsaved Changes Work:

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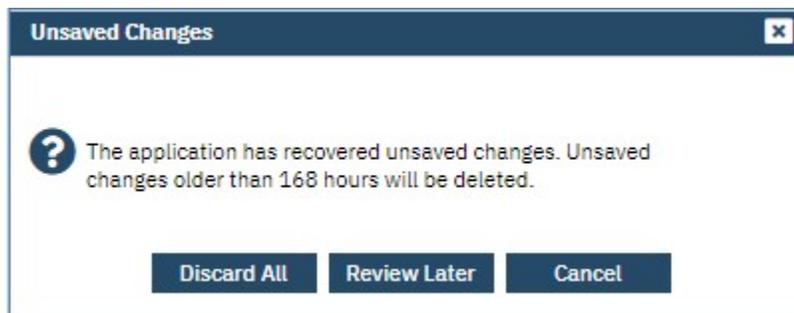
Unsaved Changes are changes that you have made in SmartCare that you have not saved, but the system has stored in a temporary holding area until you decide what to do with them.

When you start entering information in a screen, it will appear in under the Unsaved Changes icon in the top right corner. It will remain here until you Save the screen, or close out and choose to Discard changes.

You can have multiple Unsaved Changes.



If you close out of SmartCare while you still have Unsaved Changes, you will get a pop-up prompting you to decide what to do about them:



- Discard All: clicking this button will discard all changes for all documents in the Unsaved Changes list and you will not be able to recover them.
- Review Later: clicking this button retains the Unsaved Changes to be addressed later.
- Cancel: clicking this button will cancel the action (not attempt to close out.)

Note: This message will appear again at login if you select 'Review Later' when logging out.

### Addressing Unsaved Changes Promptly

The Unsaved Changes function can be very beneficial at times, but can also cause a lot of problems if not used appropriately.

The best practice is to save your work regularly and to click Save before changing screens. Also, keep an eye on your Unsaved Changes list and address them promptly:

- If you have an Unsaved Change that you would like to save:
  - Click on the Unsaved Changes icon and click the Unsaved Changed from the dropdown (the name of the screen) to open it. (**Do not open the screen any other way.**)

- Then click the Save button or click on the red X to close the screen and select **Yes** when asked if you want to save your changes.
- If you have an Unsaved Change that you do not want to keep:
  - Click on the Unsaved Changes icon and Click the Unsaved Changed from the dropdown (the name of the screen) to open it. (Do not open the screen any other way.)
  - Then click the red X to close the screen and select No when asked if you want to save your changes.

Unsaved Changes are meant as a fallback in the event that you forget to Save. There are a few reasons why you would not want to keep Unsaved Changes on your screen:

1. While it is in your Unsaved Changes list, other staff cannot view the changes you had made to the screen. (They can only view the last saved version.)
2. Under certain conditions, you may not be able to save your changes when you pull them up again.
3. **Unsaved changes are deleted after 7 days if they are not saved.**

## Understanding the Documents Header

The following header appears in all Documents:



Item	Description
1	Document Name The name of the document selected displays.
2	Date of previous document If there are any previous documents of this type, the date of the previous document will display.
3	Date of next document If there are any additional documents of this type, the date of the next document will display.
4	Previous / Next arrows Clicking on the arrows will open the previous or next document of this type.
5	Go To Another way to navigate to other types of documents for the client selected.
6	Sign The Author of the document clicks this button to Sign,

7	Edit / View toggle	<p>When in View mode, the Edit button displays. When in Edit mode, the View mode displays.</p> <p>Clicking the Edit button allows the Author to edit the document. If the document has already been signed, the Author can create a new version of the document, which allows them to edit.</p> <p>Clicking View displays the document as a pdf.</p>
8	Share	<p>Documents default to 'Shared.' A check in this box means that other staff that have access to this client will be able to view the document in View mode. (They will be unable to edit.)</p>
9	Status	<p>The Document status defaults to 'In Progress' and changes automatically as appropriate. e.g. when signed, the status changes to 'Signed.'</p>
10	Effective	<p>The Effective Date of the Document. In most cases, this date is copied in from another entry in the document. (e.g. for Treatment Plan, it copies from the Plan/Meeting Date.) Some Documents require staff to enter the Effective Date. Documents cannot be saved without an Effective Date.</p>
11	Author	<p>The Author of the Document displays here. This is the clinician that can edit and sign the Document.</p> <p>The Author may reassign the Document to another clinician by selecting that clinician in the dropdown. If the clinician clicks 'OK' at the Confirmation Message, the change will take place and s/he will no longer be able to edit.</p>

		Proxy staff can also be selected from this dropdown for medical documents.
12	More Detail	Clicking this button expands the height of the Documents Header to display version and co-signer information. (See next.)

## More Detail Section of Documents Header



Item	Description	
13	Other Versions	All versions of the document display here. If there are previous versions of the document and it is currently In Progress, a trashcan will display by the most recent version—this is how to delete the most recent version.
14	Signed By	The Signer and date signed display.
15	Signer	Co-signers can be added using the dropdown. If a co-signer appears in the box, s/he can sign by clicking the Sign button, or decline to sign by clicking the Decline button.

## How to use the Private Window

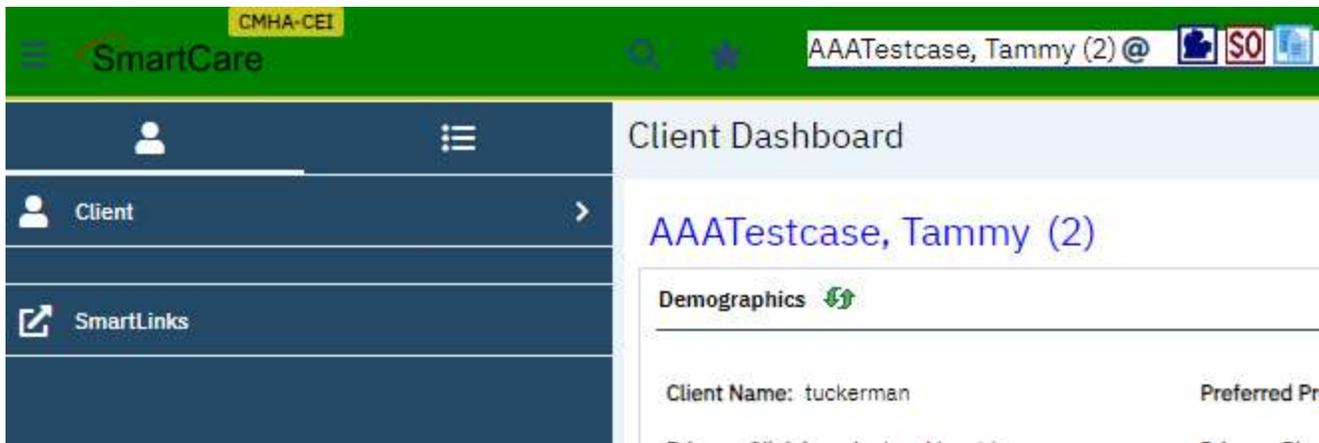
The Private Window is a read-only copy of the Client Tab. It is available in all documents and service notes screens and will be useful when you need to refer to another document for that client, as you will not need to leave the In Progress document.

### How the Private Window Works

The Private Window is launched by clicking on the icon on the toolbar.



When the icon is clicked, a separate Chrome window is launched. The new window is notable by the dark gray tab / address bar and the green bar just beneath it.



The new window will display a read-only copy of the Client QuickLink. You can navigate to any document or note just as you would before. However, as this is a read-only window, you not be able make any edits or create new Services / Notes or Documents.

You can copy information from the Private Window and paste into your main SmartCare window.

When you are done reviewing additional information for the client, close the Private Window by clicking the X in the upper right corner of the Private Window, just as you would to close Chrome.



## Cautions

It is possible to open several Private Windows. Be sure to close out of a Private Window before changing clients; using multiple windows increases the chance of error because there is no warning if you have a different client pulled up in Private Window than you do in your main SmartCare screen.

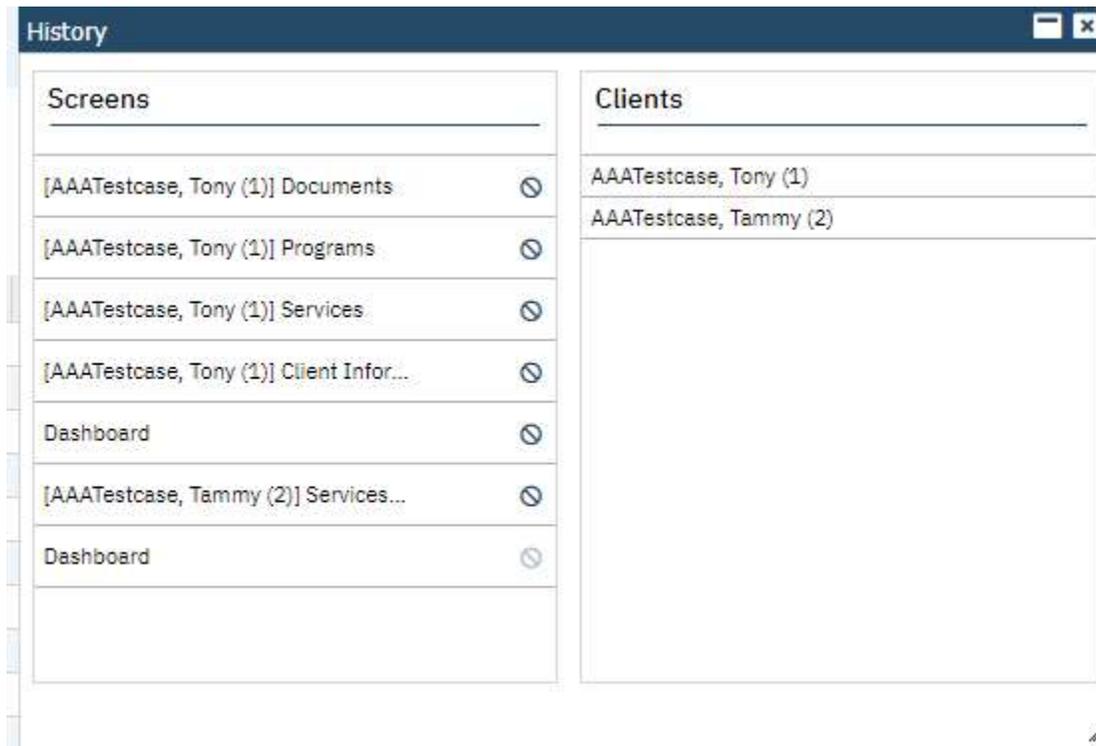
## Tricks to Make Your Life Easier

### History

For each session that you are logged in to SmartCare, the system stores a history of clients and Screens you have selected. You can view your History, or click on an item to navigate back to that page. Click on the History button to open the History window:



The buttons in the top right corner of the screen will close or maximize the window.



The History resets when you close out of SmartCare.

### Hover

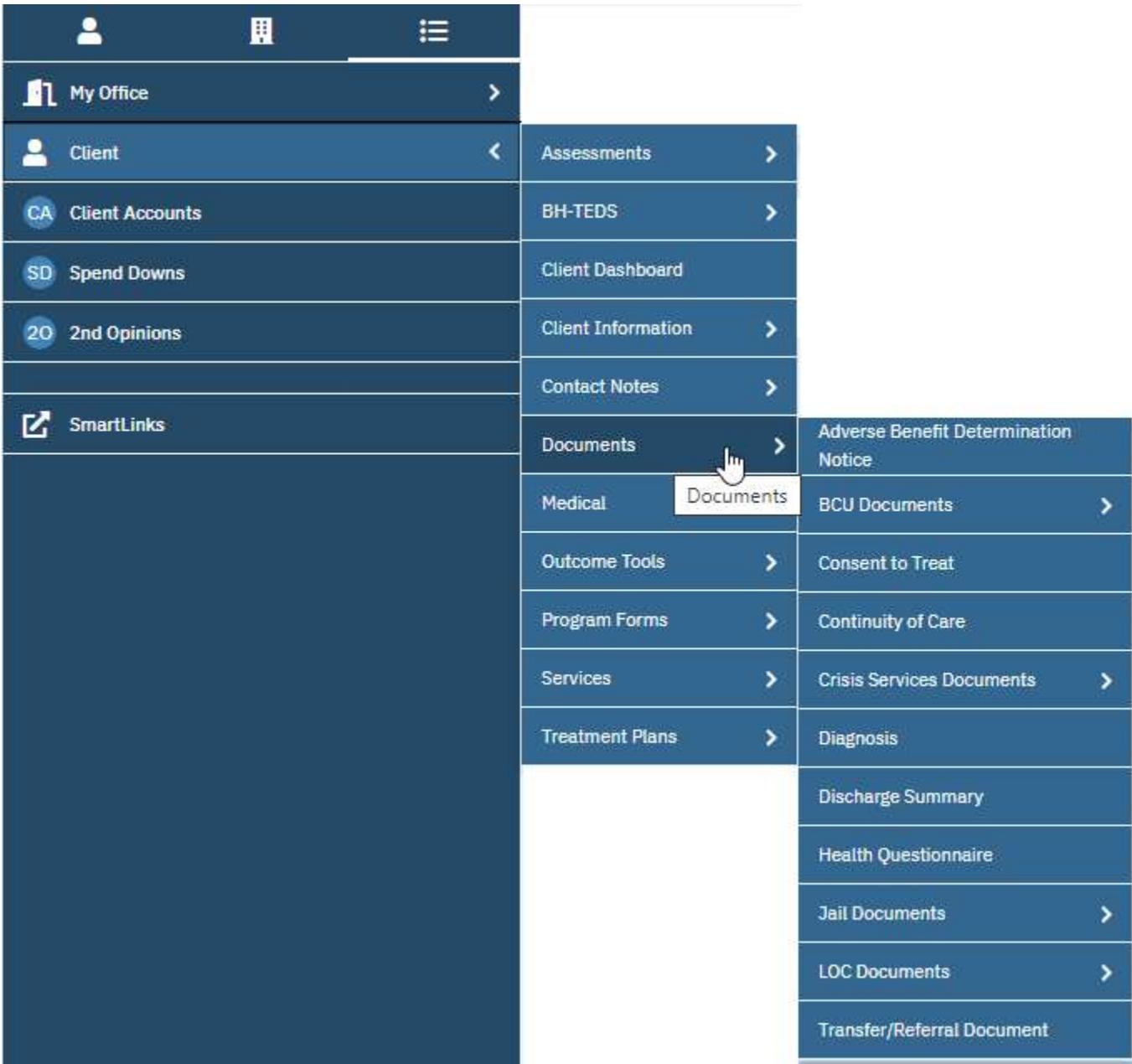
If a field is truncated in a grid, you can often hover over the field to see the full text:

Organization	Guardian	Emergency	Financially R
DHS Ing...	No	No	No
Rallies	Yes	Yes	Yes
DHS Ingham	No	No	No

You can hover over an icon to display the icon name:



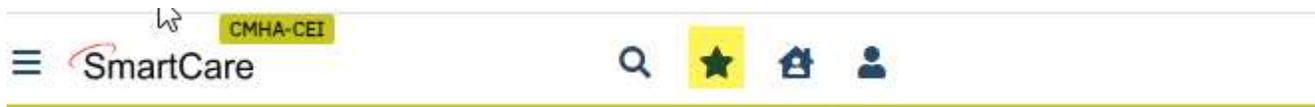
And, of course, you can hover over a parent QuickLink to access the sub-QuickLinks:



## Favorites

Are there screens that you use regularly and you want a quick way to open them? You can set them up as Favorites!

The Favorite search displays as an icon in the top left of the screen.



You can add screens to your favorites search by clicking this icon where it is available.



This will bring up an option to name the favorites and add filter options for certain list pages.

The image shows a dialog box titled 'SmartCare' with a close button. The main content area is titled 'Favorite Filter Name' and contains a text input field with the value 'My Services' and a 'Clear' button. Below this are two rows for date filtering. The first row is labeled 'From' and the second 'To'. Each row has a date picker icon, radio buttons for 'Static' and 'Relative' (with 'Relative' selected), and an empty text input field. At the bottom of the dialog is a table with the header 'Favorite Filter Names' and one row containing the text 'No records found.'. At the very bottom right are 'Ok' and 'Cancel' buttons.

The selected favorites will now appear on the Favorite Search dropdown.

