Community
MENTAL HEALTH
CLINTON • EATON • INGHAM

SmartCare

Basic Functions

User Guide

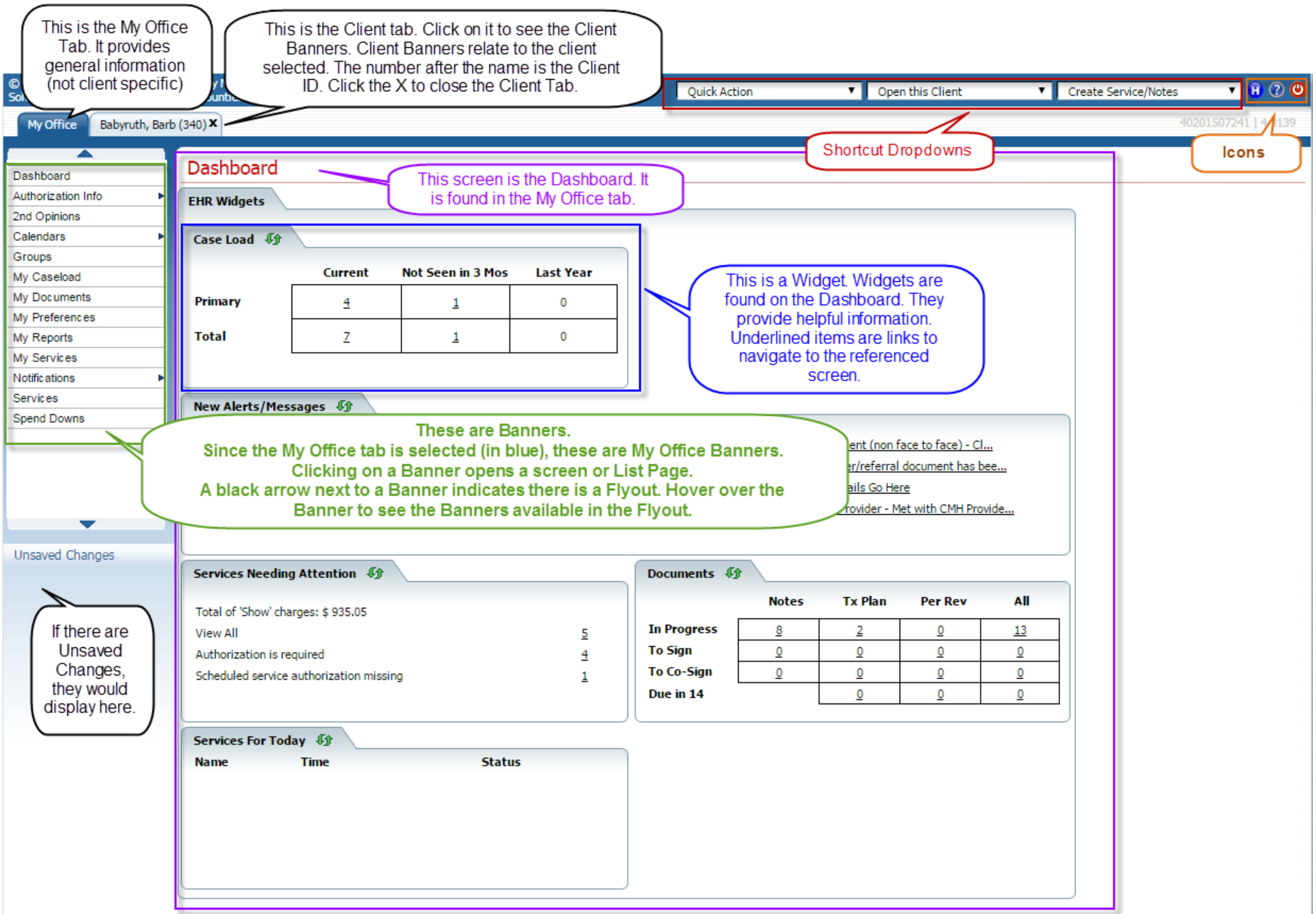
Updated March 26, 2018

www.ceicmh.org

This guide will provide information on how to perform some basic functions in SmartCare.

Table of Contents

SmartCare Screen Information

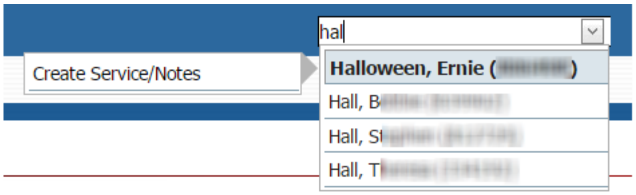


Searching for a Client

There are multiple methods to search for a client.

Search or Open a Client already in the system

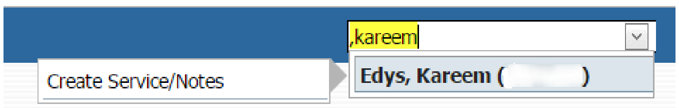
You will be able to type the client name* or Client ID directly into the dropdown menu to search, ***without having to open the Client Search Window***! (Note: You will still need to use the Client Search screen to create new Inquiries.)



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

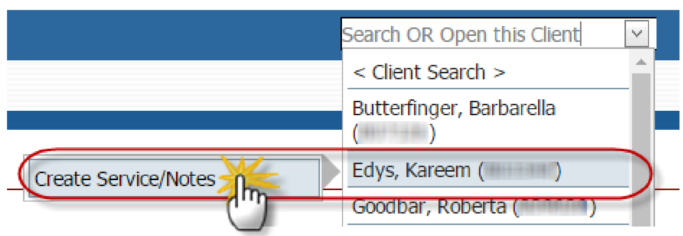
Important: Click to select the correct client. Do not just hit enter, or you could enter information for the wrong client.

*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.

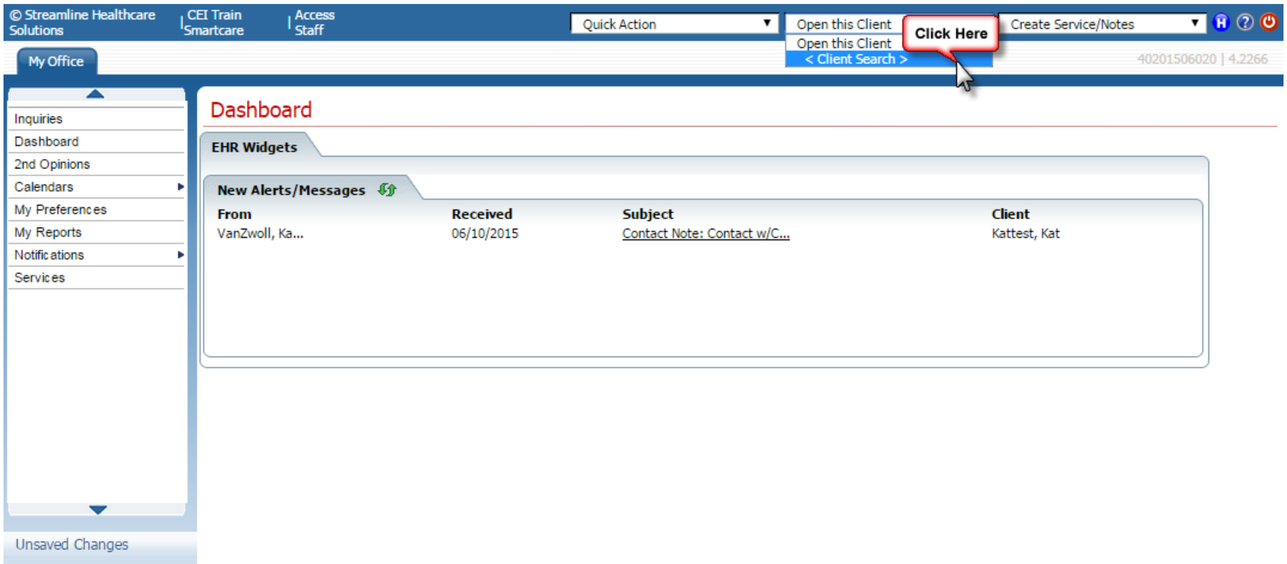
As you scroll to the **correct** client name using your mouse or the "down" arrow, a flyout sub-menu displays to the left of the client. Click on that "Create Service/Notes" to begin a new Service Note for that client.



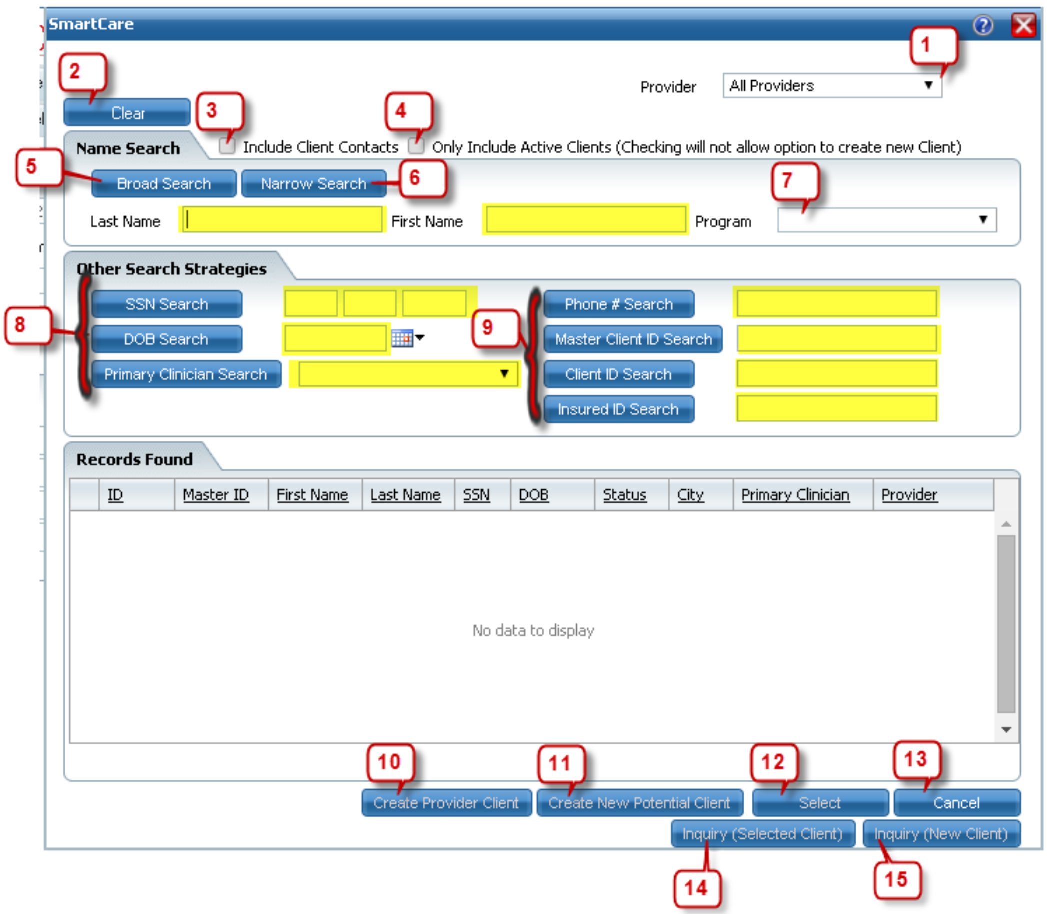
Use the full Search box

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.



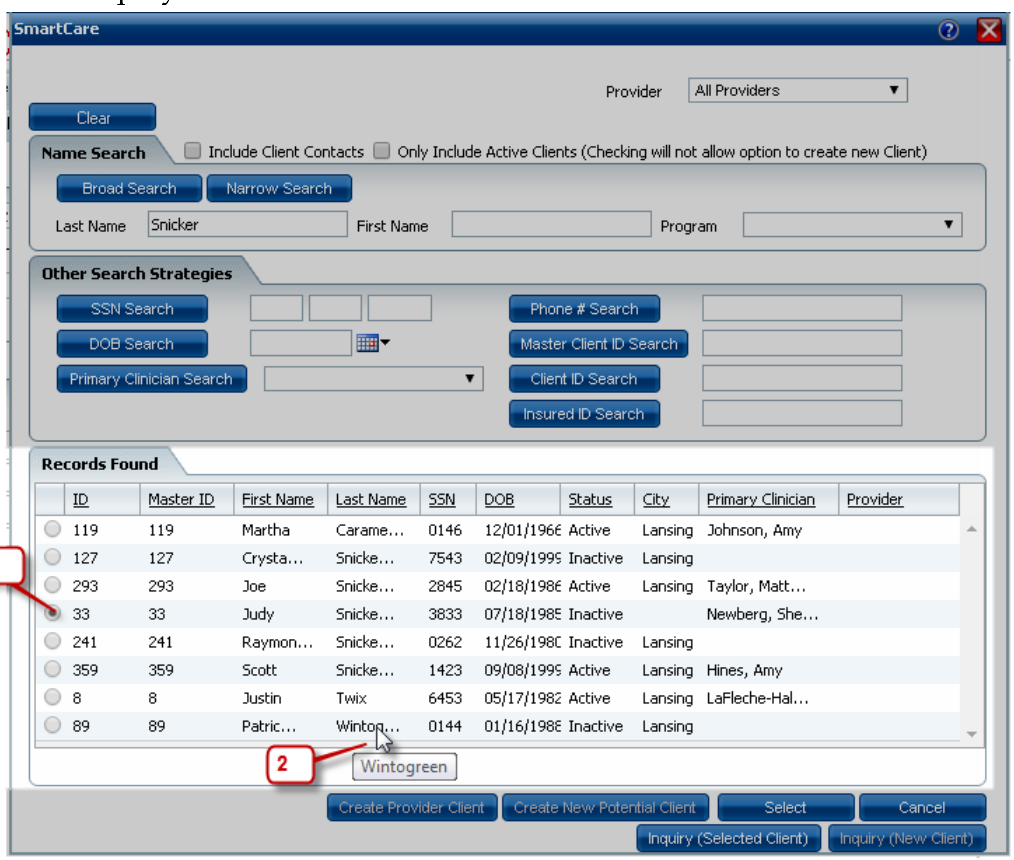
Item	Description

1	Provider Drop Down	For most CMHA-CEI staff, this value should be left as **All Providers.** 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 **General** tab of **Client Info (Admin)** 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.
Yellow Highlighted Fields	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 (Admin)** screen, on the **Aliases** tab.

Search results are displayed in the Records Found section.



Item	Description

1	Selection Indicator	The radio button indicates which client record is selected.
2	Mouse Hover	Hovering over a field with an ellipsis (…) will display a popup with the full field value.

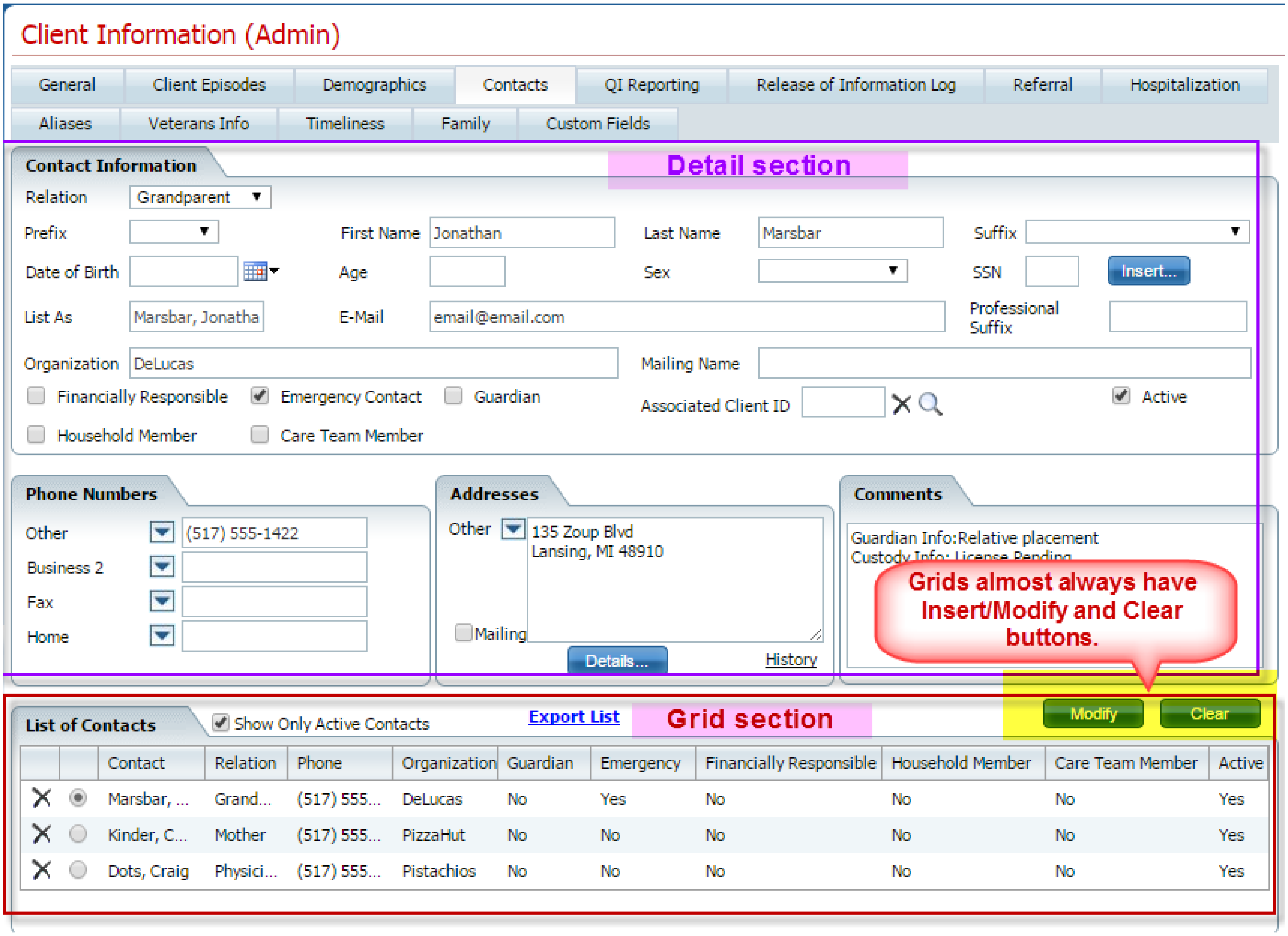
In the example in step 3 above, a **Broad Search** was performed with a Last Name entered of **Snicker**. All client records and client aliases with that text in the last name field is returned. Click the **Select** button to open the selected client record.

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.



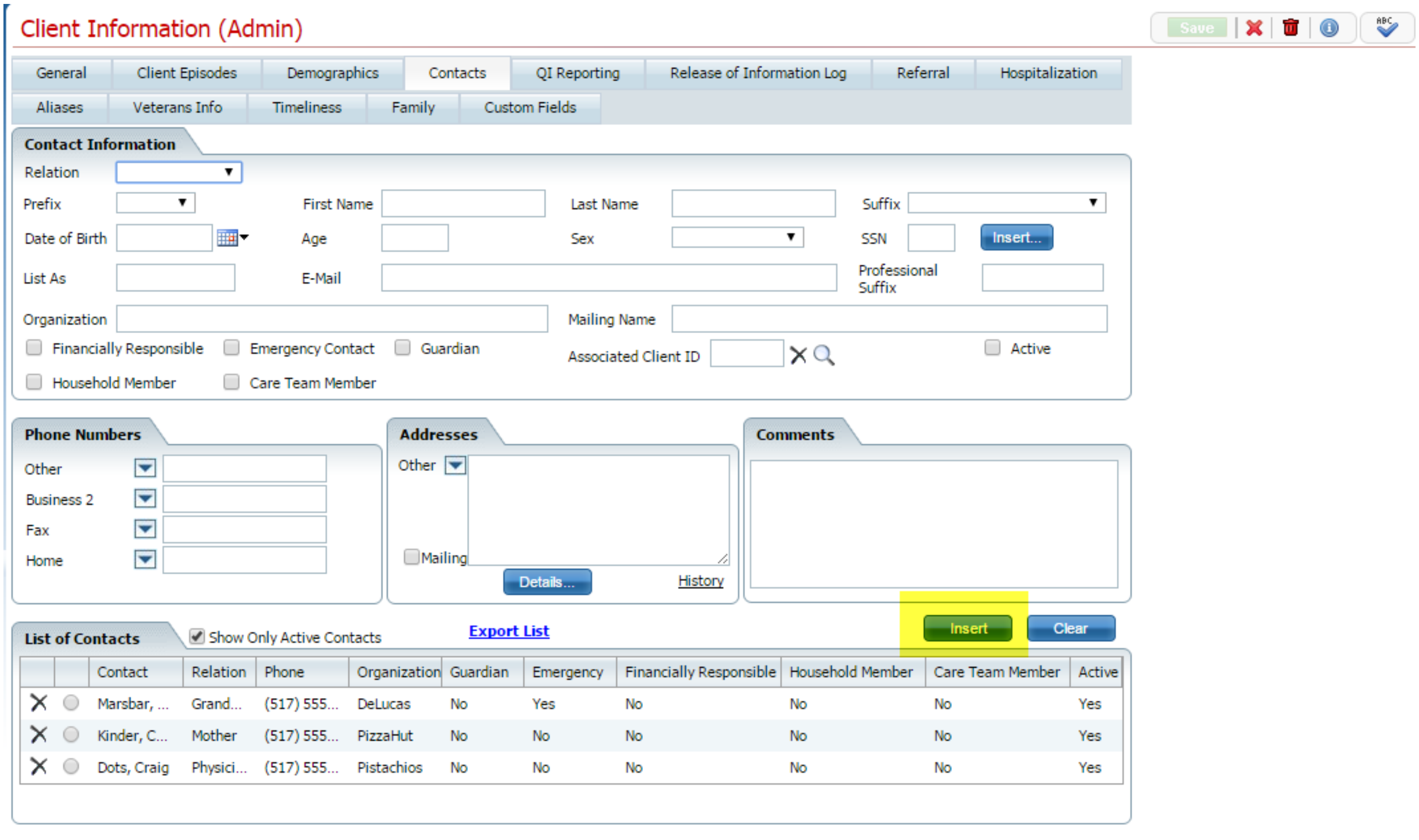
Notice that only some of the fields from the Detail section display in the Grid. You will need to select the record in the Grid and view in the Detail section to see all fields.

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.

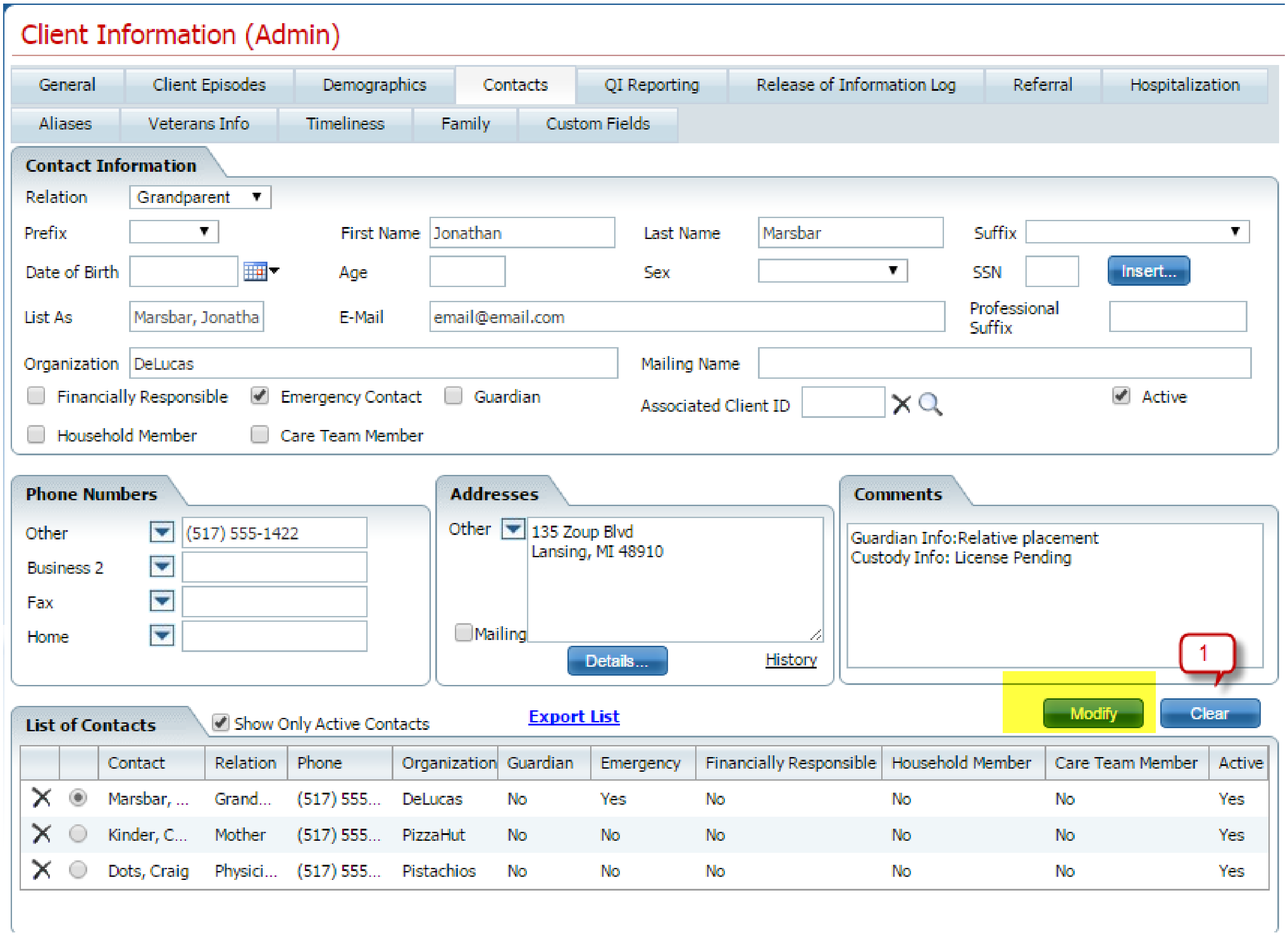
Inserting into a Grid:

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



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.'



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:

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.

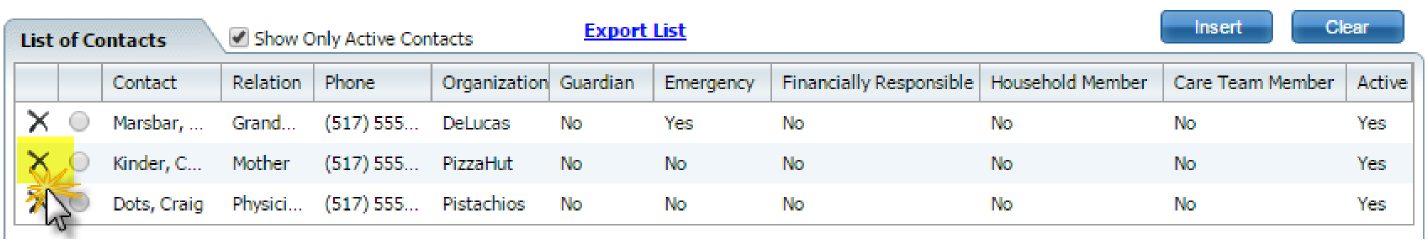
Clearing a Grid:

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:

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



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.)

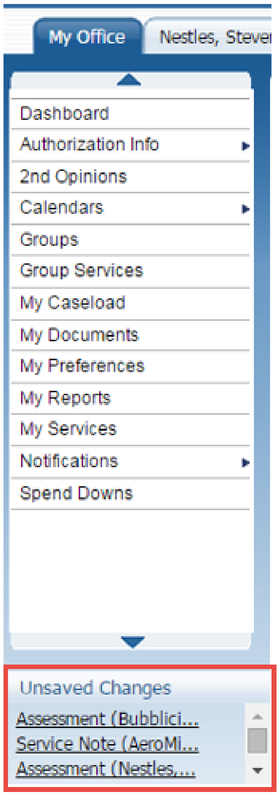
Unsaved Changes

How Unsaved Changes Work:

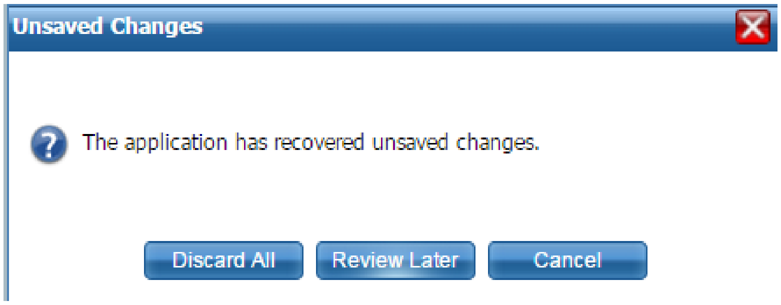
Unsaved Changes are changes that you have made in SmartCare that you have not saved, but the system has stored in a temporary holding area until you decide what to do with them.

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

You can have multiple Unsaved Changes, but only three will display at a time; a scroll bar indicates that there are additional unsaved changes. (Scroll up or down to view all of them.)



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 thus 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 link (the name of the screen, underlined) 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 link (the name of the screen, underlined) 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.

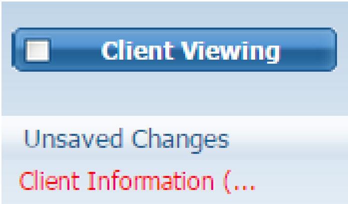
Problems with Unsaved Changes

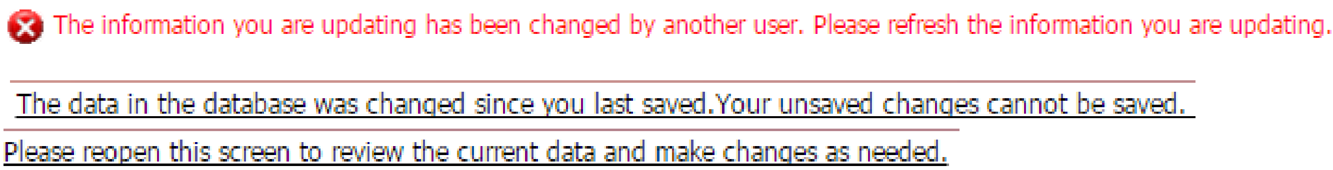
If you have Unsaved Changes for a screen and more changes are made in another instance / version of the screen, it will cause a conflict that the system cannot resolve. In that case, you will not be able to save your changes.

These are some causes of this conflict—when you have Unsaved Changes and:

1. Someone else goes into the same screen and makes changes.
2. Instead of clicking on the Unsaved Changes link, you re-open the screen another way and start making changes.
3. Your screen refreshes and puts you in a previous version of the screen. Then when you make changes, you have two in progress versions of the screen, causing a conflict.

When in this state you may see the Unsaved Change in red, and/or some error messages at the top of the screen:





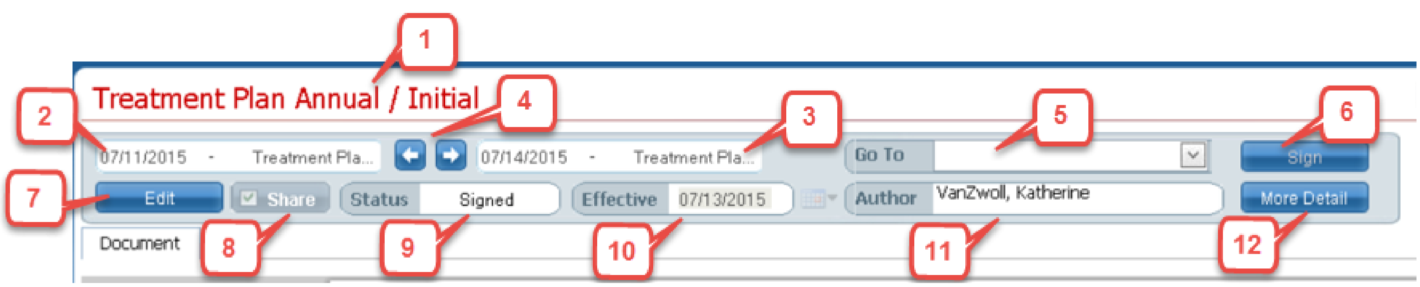
You will be unable to save.

If this occurs, you will need to close out of the screen in question and select No when asked if you want to save your changes. Your changes will be lost and you will need to re-enter them. If you entered a lot of information that will be lost, you can copy it to Word or Print Screen before closing so it can be re-entered. (To Print Screen, click on the Print Screen (PRTSC) button on your keyboard, then open Word, right click and choose Paste.)

Also, sometimes if you have Unsaved Changes for a screen, you will get a red error message when you try to open up the screen, even if it is for a different client.

Understanding the Documents Header

The following header appears in all Documents:

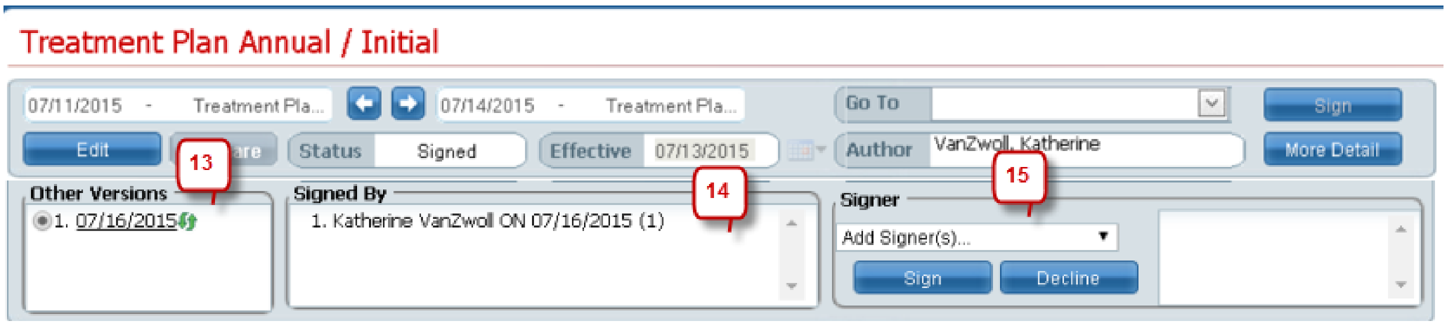


	Item	Description
1	Document Name	The name of the document selected displays.
2	Date of previous document	If there are any previous documents of this type, the date of the previous document will display.
3	Date of next document	If there are any additional documents of this type, the date of the next document 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	When in View mode, the Edit button displays. When in Edit mode, the View mode displays. 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. Clicking View displays the document as a pdf.
8	Share	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.)
9	Status	The Document status defaults to 'In Progress' and changes automatically as appropriate. e.g. when signed, the status changes to 'Signed.'
10	Effective	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.
11	Author	The Author of the Document displays here. This is the clinician that can edit and sign the Document. 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. 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



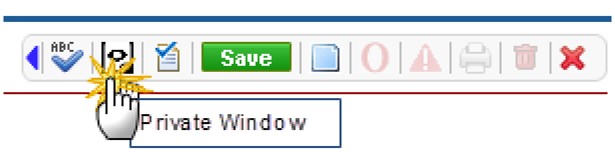
	Item	Description
13	Other Versions	All versions of the document display here. If there are previous versions of the document and it is currently In Progress, a trashcan will display by the most recent version—this is how to delete the most recent version.
14	Signed By	The Signer and date signed display.
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

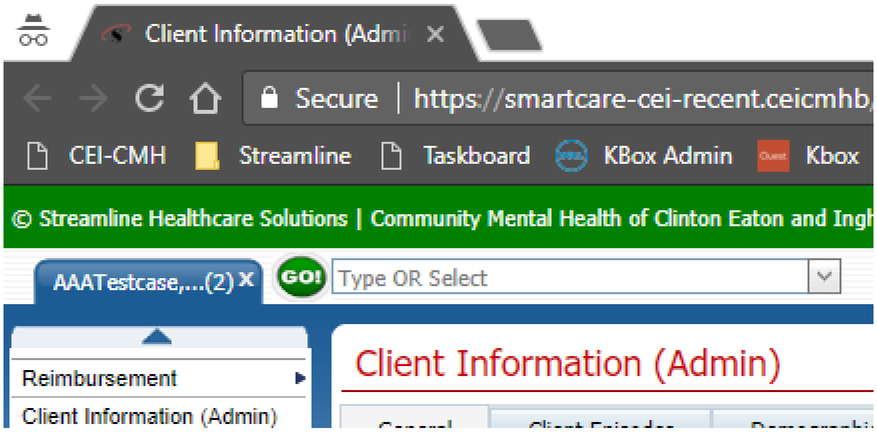
The Private Window is a read-only copy of the Client Tab. It is available in all documents and service notes screens and will be useful when you need to refer to another document for that client, as you will not need to the leave the In Progress document.

How the Private Window works

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



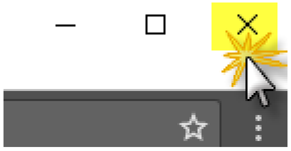
When the icon is clicked, a separate Chrome window is launched. The new window is notable by the dark gray tab / address bar and the green bar just beneath it.



The new window will display a read-only copy of the Client Tab. 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.



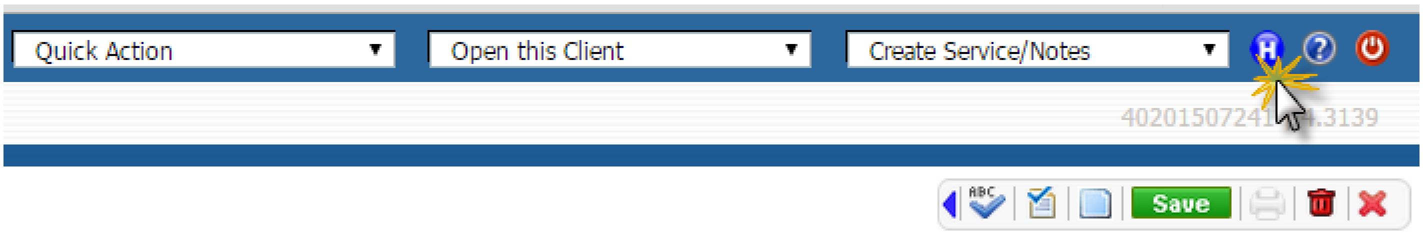
Cautions

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.

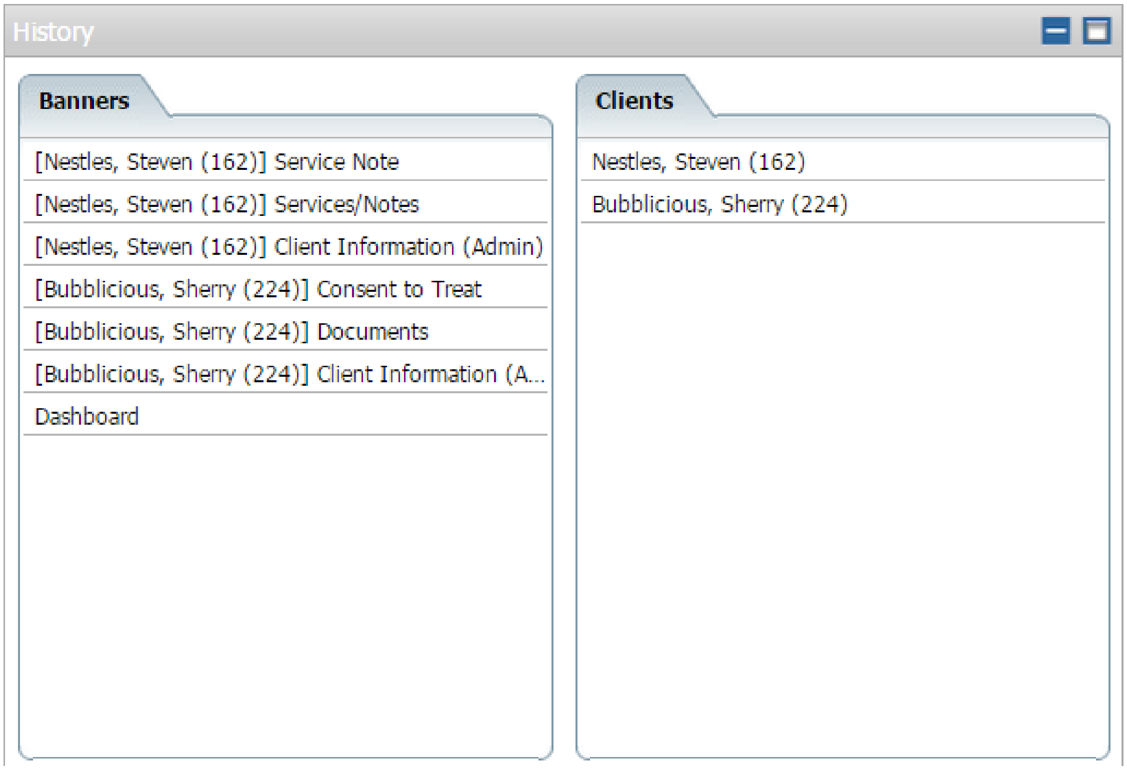
Tricks to Make Your Life Easier

History

For each session that you are logged in to SmartCare, the system stores a history of clients and Banners 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.



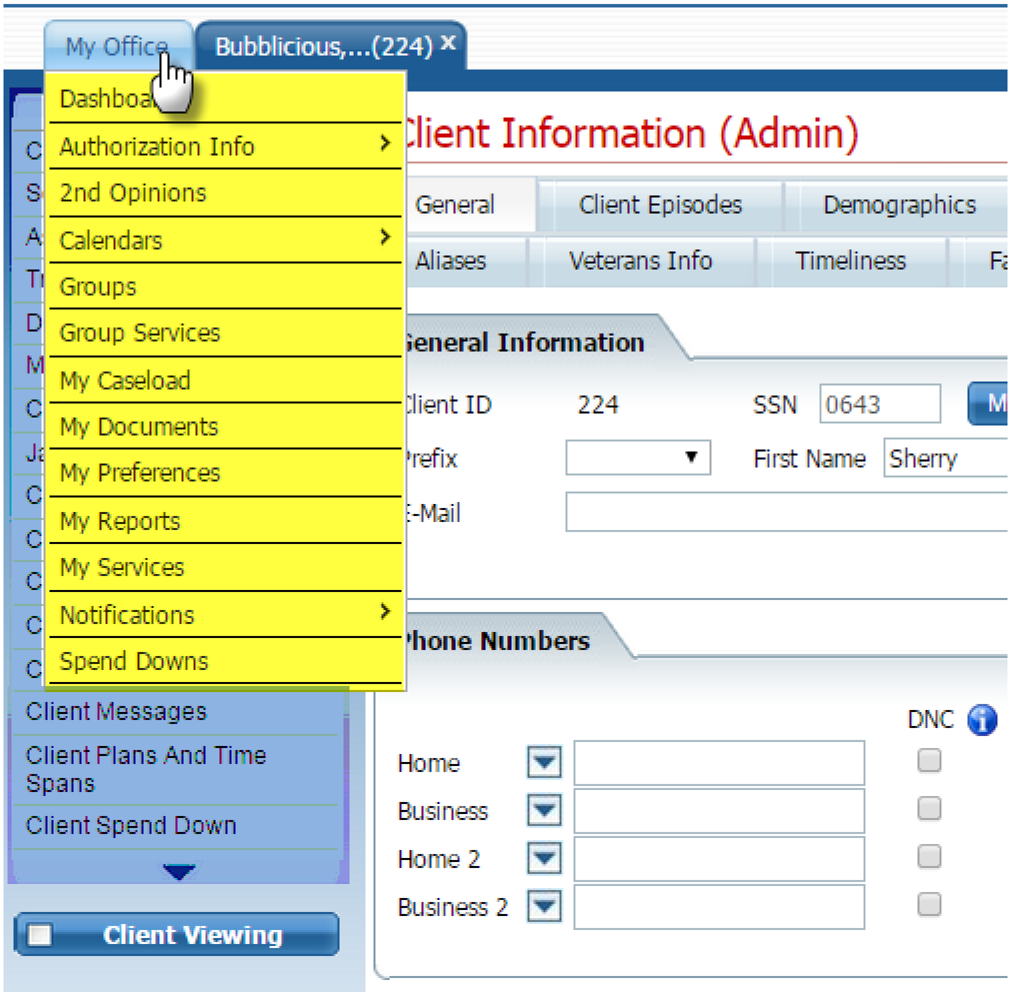
The History resets when you close out of SmartCare.

'Hover' Banner List

If you have both the My Office and Client Banners open, the tab you are focused on determines the Banners that display. You do not have to click on the other tab to access the other set of Banners.

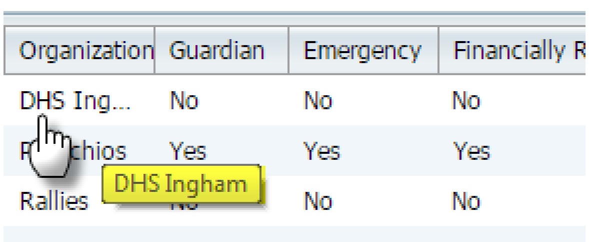
A slightly faster way would be to hover over the other tab name and those Banners will appear on top of your Banner list. In the example below, I am on the Client tab, but I hovered over My Office.

The My Office Banners (highlighted yellow in this picture) are layered on top of the Client Banners (highlighted blue in this picture.)

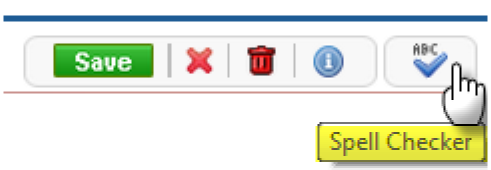


Hover

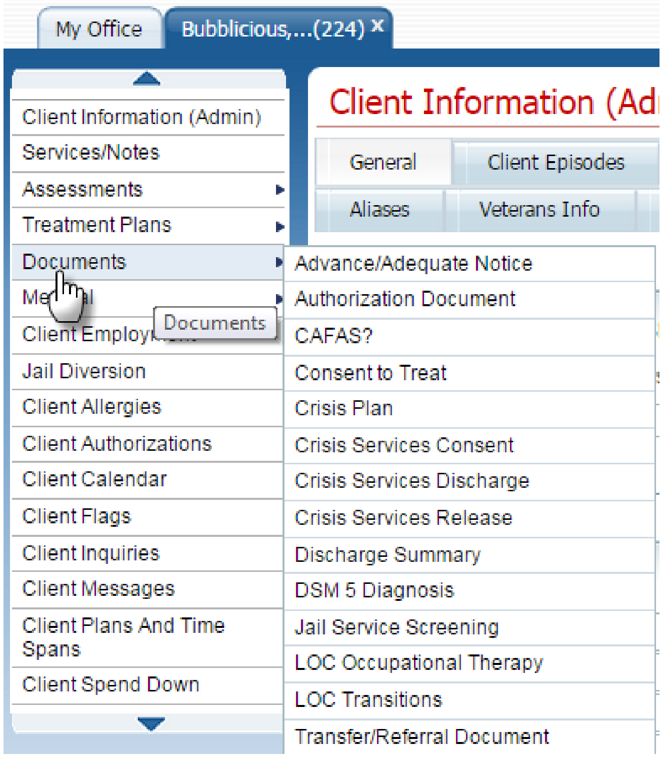
If a field is truncated in a grid, you can often hover over the field to see the full text:



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



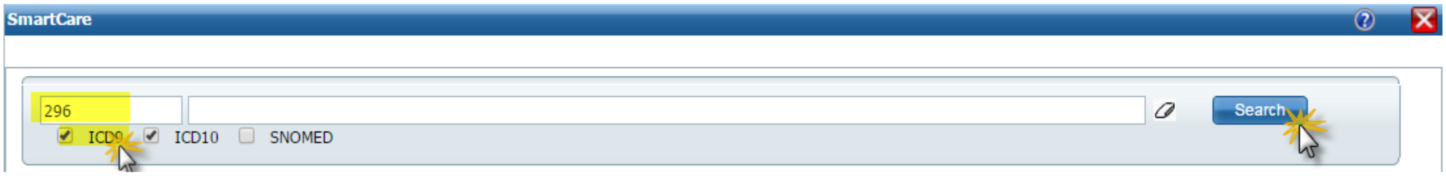
And, of course, you can hover over a parent Banner (a Banner with a black triangle) to access its sub-banners:



Searching for an ICD9 Diagnosis

Do you know the ICD9/DSM-IV diagnosis but you aren't sure what code to use for ICD10 / DSM5?

From a Diagnosis screen, type F in the Code box and then the Tab key to do a search. This brings up the results window, where you can click on the ICD9 check box and then enter the known ICD9 Code (or description) and click the Search button:

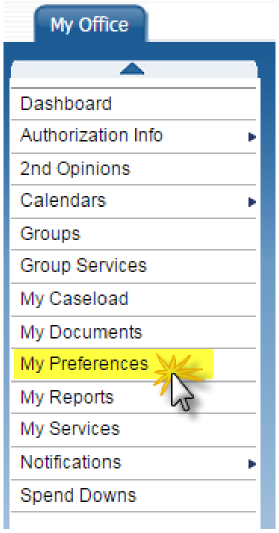


The results will display (both ICD9 and ICD10 codes) and when you select a diagnosis, the ICD10 code will be inserted into the grid. *(Note: You can search on ICD9 descriptions but they will not display in the results window.)*

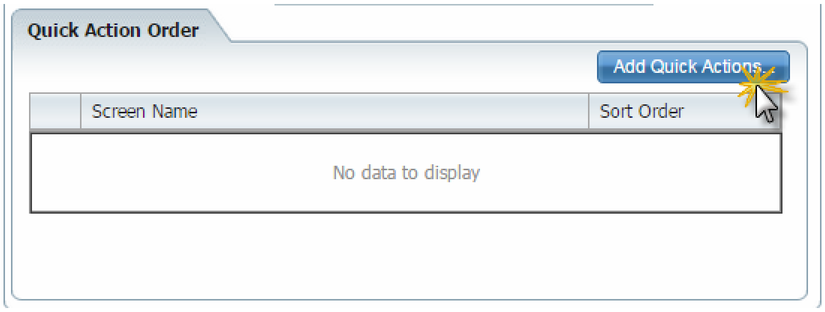
Quick Action Items

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

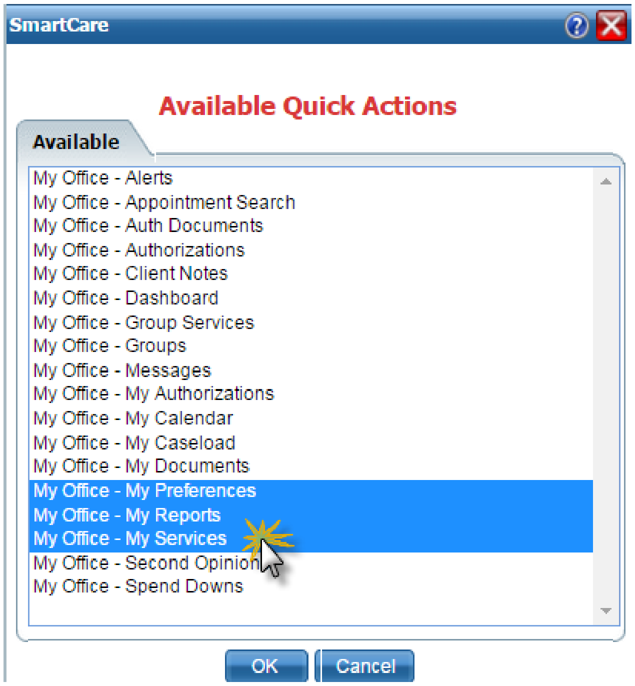
Click on the My Preferences Banner in the My Office tab:



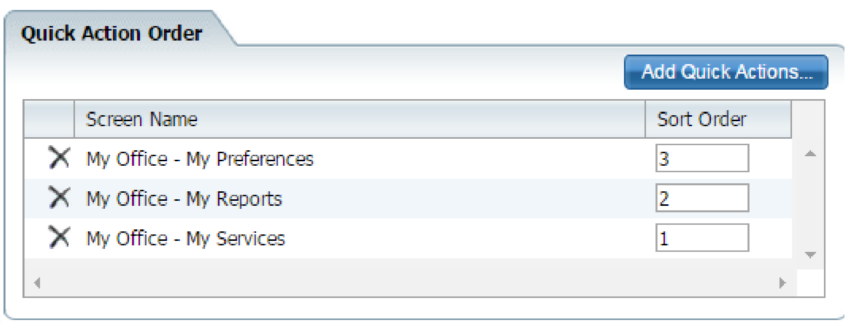
In the Quick Action Order section, click on the Add Quick Actions button.



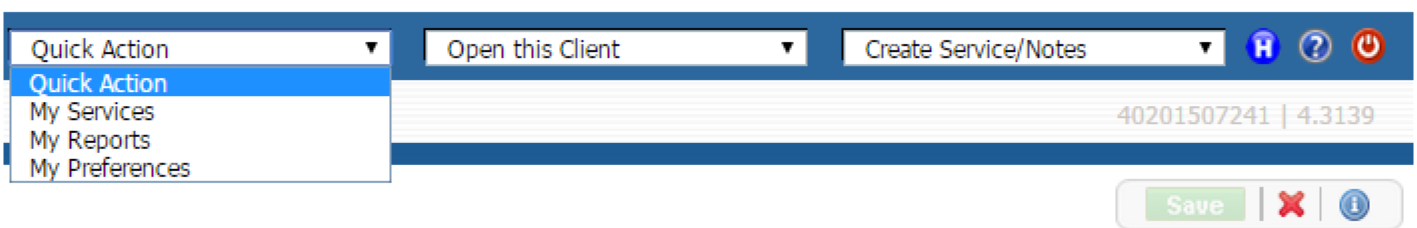
This will bring up the list of Available Quick Actions. Select one or multiple Banners (using Ctrl + Click) and then click OK.



Adjust the Sort Order if desired and click Save.



The selected Banners will now appear in your Quick Action dropdown. Clicking on the item will open it.



Note: In My Preferences, do not make changes to the sections on the left side of the screen. Passwords cannot be changed here.