



**Community**

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# Smartcare

## Getting Started in CEI Practice

### User Guide

This guide provides information on logging in and getting started in the CMHA-CEI Practice System.

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## Setting up for Use

### Logging In

Go to the following link in your browser (Chrome by default on CEI PCs and Laptops):

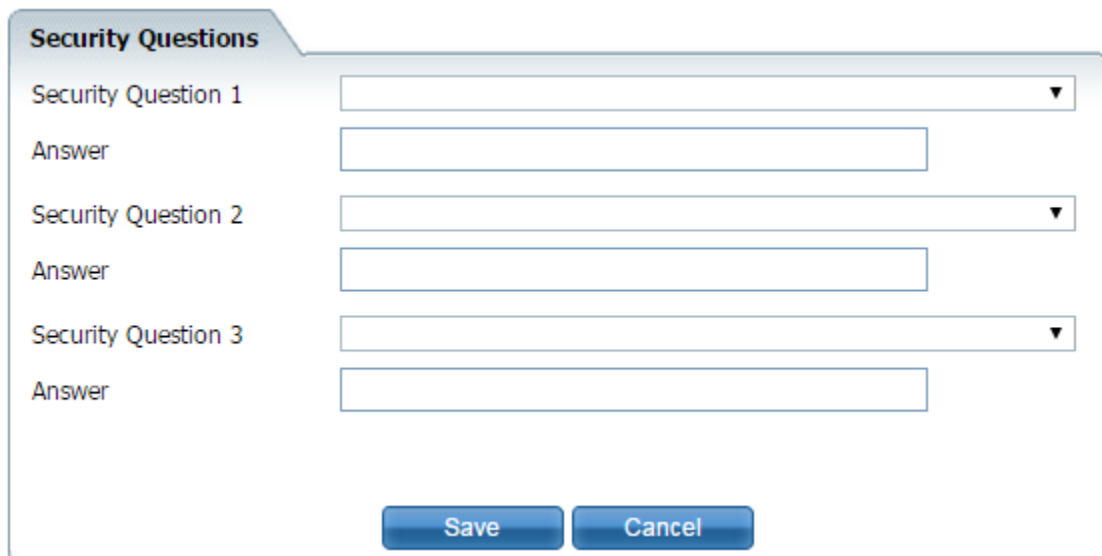
<https://smartcare-practice.ceicmhb/SmartCare/>

Enter the username and password that you use to login to your PC/Laptop. Click Login



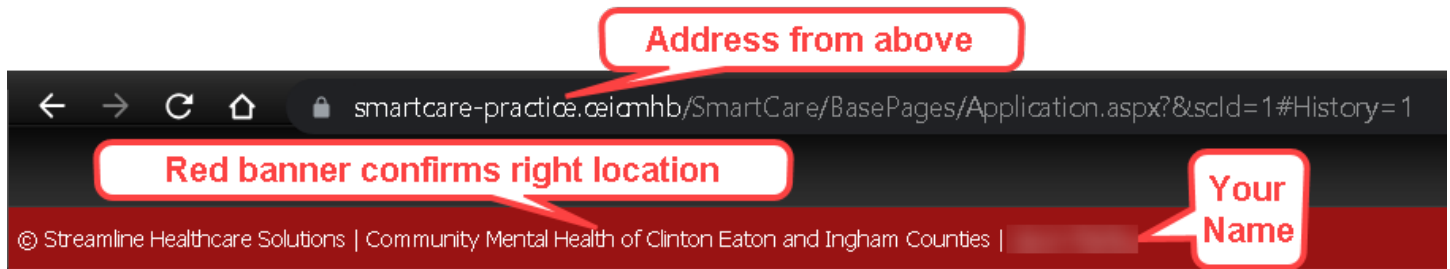
The image shows a login form for Streamline Healthcare Solutions, L.L.C. The form is contained within a light blue rounded rectangle. At the top left is the company logo, which consists of a red swoosh above the text "Streamline Healthcare Solutions, L.L.C.". Below the logo is a light blue rectangular box containing the login fields. On the left side of this box are the labels "Username" and "Password". To the right of "Username" is a white text input field. To the right of "Password" is a white password input field. At the bottom right of the box is a blue button with the text "Login". Below the login form, centered, is the copyright notice: "Copyright © 2014 - 2015 Streamline Healthcare Solutions, L.L.C. All Rights Reserved."

You will need to setup three security questions. Select your question from the Dropdown and enter the Answer. Click Save when complete.



The image shows a "Security Questions" setup form. The form has a title "Security Questions" in a dark blue box at the top left. Below the title are three rows of input fields. Each row starts with a label "Security Question 1", "Security Question 2", and "Security Question 3" respectively. To the right of each label is a dropdown menu with a downward arrow. Below each dropdown menu is a text input field labeled "Answer". At the bottom of the form are two blue buttons: "Save" and "Cancel".

Your initial screen will look similar to the following. You will see a RED banner and the address should include “practice” in it.

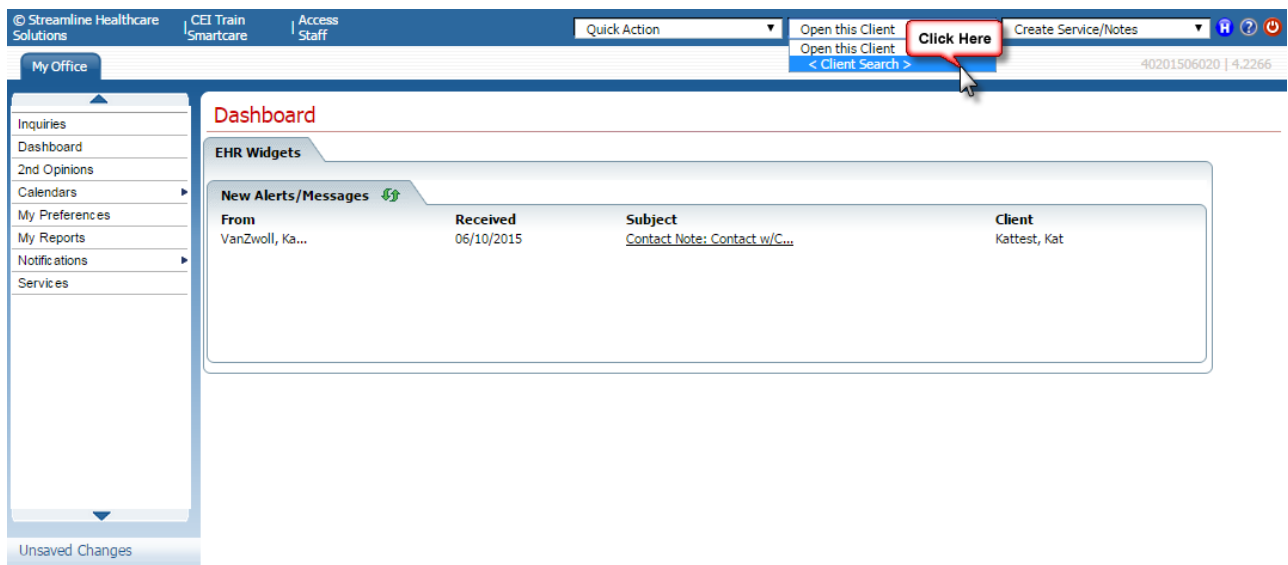


If you see a different banner, please verify you used the link given above only. If you still see a different banner, please contact Helpdesk.

## Search for a Client

### Quick Start on Searching

1. 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.



2. The Client search window will appear. Enter your search criteria and click the appropriate search button. The practice system uses clients with candy bar names. So when searching for a client by name, use your favorite candy bar in the last name field (ex. Snickers) then click the Broad Search or Narrow Search button. Broad Search will return the most results.

SmartCare

Provider: All Providers

Clear

**Name Search**  Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search

Last Name: snickers First Name: Program:

**Other Search Strategies**

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Insured ID Search

**Records Found**

ID	Master ID	First Name	Last Name	SSN	DOB	Status	City	Primary Clinician	Provider
119	119	Martha	Caram...	0146	12/01/196	Active	Lansing	Johnson, Amy	
127	127	Crysta...	Snicke...	7543	02/09/199	Inactive	Lansing		
293	293	Joe	Snicke...	2845	02/18/198	Active	Lansing	Taylor, Matt...	
33	33	Judy	Snicke...	3833	07/18/198	Inactive		Newberg, She...	
241	241	Raymon...	Snicke...	0262	11/26/198	Inactive	Lansing		
359	359	Scott	Snicke...	1423	09/08/199	Active	Lansing	Hines, Amy	
8	8	Justin	Twix	6453	05/17/198	Active	Lansing	LaFleche-Hal...	
89	89	Patric...	Wintog...	0144	01/16/198	Inactive	Lansing		

Create Provider Client Create New Potential Client **Select** Cancel

Inquiry (Selected Client) Inquiry (New Client)

Select the client you would like to use.

If you want to add a document for a client, ensure the status of the client is "Active" in the Status column of the Client Search window. Documents cannot be added to Inactive clients. This can be accomplished in searches by checking the "Only Include Active Clients" box at the top of the search screen.

For more detailed information on all of the search features see the [Basic Functions User Guide](#). This can be found on the Intranet in Reference Material: IS Information: Streamline Smartcare: [User Manuals](#).