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| **SmartCare MH Training Guide** **Directions**: Please review each form/process using the links to the specific guides. Upon reviewing, it is highly encouraged to use the SmartCare TRAIN system to enter information and become more familiar with the forms, list pages, reports, and other resources.  |
|  | **User Guides**  | **Done**  |
| **SmartCare Basics:** Logging in to SmartCare  | **User Login Process:** Changing Your Password: [htps://2023.calmhsa.org/changing-your-password/](https://2023.calmhsa.org/changing-your-password/)  Setting up Your Security Questions: [htps://2023.calmhsa.org/seng-up-yoursecurity-quesons/](https://2023.calmhsa.org/setting-up-your-security-questions/)  Multi-Factor Authentication: [htps://2023.calmhsa.org/subsequent-logins/](https://2023.calmhsa.org/subsequent-logins/)  **Login Help**: How to Recover Your Username: [htps://2023.calmhsa.org/how-to-recoveryour-username/](https://2023.calmhsa.org/how-to-recover-your-username/)  How to Reset Your Password: [htps://2023.calmhsa.org/how-to-reset-yourpassword/](https://2023.calmhsa.org/how-to-reset-your-password/)   | [ ] [ ] [ ] **[ ]** [ ]  |
| **SmartCare** **Basics for All** **Users**-Basic Navigation  | **List Pages:** [How to Save Filters and/or Create Favorites: htps://2023.calmhsa.org/how-touse-filters/](https://2023.calmhsa.org/how-to-use-filters/)  [How to Sort the Columns: htps://2023.calmhsa.org/how-to-sort-the-columns/](https://2023.calmhsa.org/how-to-sort-the-columns/)  [How to Export Data: htps://2023.calmhsa.org/how-to-export-data/](https://2023.calmhsa.org/how-to-export-data/)  **Widgets:** [Tracking Widget: htps://2023.calmhsa.org/widgets/](https://2023.calmhsa.org/widgets/)  [The Appointments For Today Widget: htps://2023.calmhsa.org/theappointments-for-today-widget/](https://2023.calmhsa.org/the-appointments-for-today-widget/)  [The Caseload Widget: htps://2023.calmhsa.org/the-caseload-widget/](https://2023.calmhsa.org/the-caseload-widget/)  [The SmartView: htps://2023.calmhsa.org/the-smartview/](https://2023.calmhsa.org/the-smartview/)  [Care Team Widget: htps://2023.calmhsa.org/care-team-widget/](https://2023.calmhsa.org/care-team-widget/)  [Services Needing Attenton Widget:](https://2023.calmhsa.org/services-needing-attention-widget/) <https://2023.calmhsa.org/services-needing-attention-widget/>  **Other items:** [Icons: htps://2023.calmhsa.org/icons/](https://2023.calmhsa.org/icons/)  [Preferences: htps://2023.calmhsa.org/preferences/](https://2023.calmhsa.org/preferences/)  [Screen vs. Document: htps://2023.calmhsa.org/screen-vs-document/](https://2023.calmhsa.org/screen-vs-document/)  [Making a QuickLink : htps://2023.calmhsa.org/making-a-quicklink/](https://2023.calmhsa.org/making-a-quicklink/)  Creating a Client Flag: <https://2023.calmhsa.org/how-to-create-a-flag-to-alert-treatment-team-members-to-important-client-information/> Scanning/Uploading into Client Chart: <https://2023.calmhsa.org/how-to-scan-a-document-into-the-clients-record/> | [ ] [ ] [ ] [ ] [ ]  [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]  |
| **SmartCare** **Basics for All** **Users**- Client Search  | **Client Search** [How to Use the Client Search Icon: htps://2023.calmhsa.org/how-to-use-theclient-search-icon/](https://2023.calmhsa.org/how-to-use-the-client-search-icon/)  [How to Use the Client Search Icon to Search to Find Client in Your Caseload:](https://2023.calmhsa.org/how-to-use-the-client-search-icon-to-search-to-find-clients-in-your-caseload/) [htps://2023.calmhsa.org/how-to-use-the-client-search-icon-to-search-to-find](https://2023.calmhsa.org/how-to-use-the-client-search-icon-to-search-to-find-clients-in-your-caseload/) [How to Use the Client Search Window: htps://2023.calmhsa.org/how-to-usethe-client-search-window/](https://2023.calmhsa.org/how-to-use-the-client-search-window/)   | **[ ]** [ ] **[ ]**  |

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| **SmartCare** **Basics for All Users**- Privacy and Consents in SmartCare  | **Clinical Data Access Group (CDAG):** How do I know what CDAG I have? [htps://2023.calmhsa.org/how-do-i-knowwhat-cdag-i-have/](https://2023.calmhsa.org/how-do-i-know-what-cdag-i-have/)  What happens if I work in both SUD and MH programs? [htps://2023.calmhsa.org/what-happens-if-i-work-in-both-sud-and-mhprograms/](https://2023.calmhsa.org/what-happens-if-i-work-in-both-sud-and-mh-programs/)  What if the client wants me to be able to talk to other programs/people/agencies? [htps://2023.calmhsa.org/what-if-the-client-wants-](https://2023.calmhsa.org/what-if-the-client-wants-me-to-be-able-to-talk-to-other-programs-people-agencies/)[me-to-be-able-to-talk-to-other-programs-people-agencies/](https://2023.calmhsa.org/what-if-the-client-wants-me-to-be-able-to-talk-to-other-programs-people-agencies/)  **Consents:**How to Complete a Consent for Telehealth: <https://2023.calmhsa.org/how-to-complete-a-consent/> (telehealth) What happens when a client signs the Coordinated Care Consent? [htps://2023.calmhsa.org/what-happens-when-a-client-signs-the-coordinatedcare-consent/](https://2023.calmhsa.org/what-happens-when-a-client-signs-the-coordinated-care-consent/)  What happens when a client revokes their Coordinated Care Consent? [htps://2023.calmhsa.org/what-happens-when-a-client-revokes-theircoordinated-care-consent/](https://2023.calmhsa.org/what-happens-when-a-client-revokes-their-coordinated-care-consent/)  Will I be alerted if a client revokes a consent? [htps://2023.calmhsa.org/will-ibe-alerted-if-a-client-revokes-a-consent/](https://2023.calmhsa.org/will-i-be-alerted-if-a-client-revokes-a-consent/)  How to Complete a Coordinated Care Consent- [Coordination of Care completion](https://2023.calmhsa.org/how-do-i-complete-a-coordinated-care-consent/)  What do I do if the client wants to revoke their Coordinated Care Consent?: [htps://2023.calmhsa.org/what-do-i-do-if-the-client-wants-to-revoke-theircoordinated-care-consent/](https://2023.calmhsa.org/what-do-i-do-if-the-client-wants-to-revoke-their-coordinated-care-consent/)  How to Determine if the Client has Signed a Coordinated Care Consent- [Completing a coordination of Care consent](https://2023.calmhsa.org/how-to-determine-if-the-client-has-signed-a-coordinated-care-consent/)  How to View What Consents a Client has Signed- [htps://2023.calmhsa.org/how-to-view-what-consents-a-client-has-signed/](https://2023.calmhsa.org/how-to-view-what-consents-a-client-has-signed/)  How to Document a Revoked Consent- [htps://2023.calmhsa.org/how-todocument-a-revoked-consent/](https://2023.calmhsa.org/how-to-document-a-revoked-consent/)  Minor Consent, Conservatorship, and Guardians- [htps://2023.calmhsa.org/how-to-document-a-revoked-consent/](https://2023.calmhsa.org/how-to-document-a-revoked-consent/)  **Authorizations to Disclose Confidential Information:** How to Document a Release of Information (Authorization to Disclose Confidential Information)- [htps://2023.calmhsa.org/how-to-document-arelease-of-informaon-authorizaon-to-disclose-confidenal-informaon/](https://2023.calmhsa.org/how-to-document-a-release-of-information-authorization-to-disclose-confidential-information/)  How to Revoke a Standard Release of Information/Authorization to Disclose Information- [htps://2023.calmhsa.org/how-to-revoke-a-standard-release-ofinformaon-authorizaon-to-disclose-informaon/](https://2023.calmhsa.org/how-to-revoke-a-standard-release-of-information-authorization-to-disclose-information/)  How to Determine What Disclosure Authorizations (Release of Information) the Client has Signed- [htps://2023.calmhsa.org/how-to-determine-what-disclosureauthorizaons-release-of-informaon-the-client-has-signed/](https://2023.calmhsa.org/how-to-determine-what-disclosure-authorizations-release-of-information-the-client-has-signed/)   | **[ ]** **[ ]** **[ ]** [ ] **[ ]** **[ ]** [ ] **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** [ ] **[ ]** **[ ]**  |

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| **Calendar** **Management**   | How to Navigate the Staff Calendar**:** [htps://2023.calmhsa.org/basic-navigaonof-the-staff-calendar/](https://2023.calmhsa.org/basic-navigation-of-the-staff-calendar/) How to Schedule an Appointment: [htps://2023.calmhsa.org/how-to-schedulean-appointment/](https://2023.calmhsa.org/how-to-schedule-an-appointment/) How to Create an Appointment from Your Calendar- [htps://2023.calmhsa.org/clinical-](https://2023.calmhsa.org/clinical-documentation/#:%7E:text=How%20to%20Create%20an,Time%20on%20Your%20Calendar)[documentaon/#:~:text=How%20to%20Create%20an,Time%20on%20Your%20C alendar](https://2023.calmhsa.org/clinical-documentation/#:%7E:text=How%20to%20Create%20an,Time%20on%20Your%20Calendar) Reception View/Check In: [htps://2023.calmhsa.org/recepon-view/](https://2023.calmhsa.org/reception-view/)   How to Reschedule a Client’s Appointment- [htps://2023.calmhsa.org/how-toreschedule-a-clients-appointment/](https://2023.calmhsa.org/how-to-reschedule-a-clients-appointment/)  How to Cancel a Client’s Appointment- [htps://2023.calmhsa.org/how-tocancel-a-clients-appointment/](https://2023.calmhsa.org/how-to-cancel-a-clients-appointment/)  How to Create a Recurring Individual Service Appointment- [htps://2023.calmhsa.org/how-to-create-a-recurring-individual-serviceappointment-2/](https://2023.calmhsa.org/how-to-create-a-recurring-individual-service-appointment-2/)  How to Document a No-Show Appointment- [htps://2023.calmhsa.org/how-to-](https://2023.calmhsa.org/how-to-document-a-no-show-appointment/)[document-a-no-show-appointment/](https://2023.calmhsa.org/how-to-document-a-no-show-appointment/)  How to Schedule Non-Client Time on Your Calendar- [htps://2023.calmhsa.org/how-to-schedule-non-client-me-on-your-calendar/](https://2023.calmhsa.org/how-to-schedule-non-client-time-on-your-calendar/)  [How to Schedule a Follow-up Appointment: htps://2023.calmhsa.org/how-toschedule-a-follow-up-appointment/](https://2023.calmhsa.org/how-to-schedule-a-follow-up-appointment/)   | **[ ]** **[ ]**  [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]  |

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| **SmartCare** **EHR Training**SmartCare Clinical Workflow (Request to Assessment)  | **Request for Services** Request for Services/Creating Client Chart: [htps://2023.calmhsa.org/how-todocument-a-call-when-you-dont-provide-services-yourself/](https://2023.calmhsa.org/how-to-document-a-call-when-you-dont-provide-services-yourself/)   **Screening** :How to Refer the Client to the County’s (MHP) System of Care: <https://www.fresnocountyca.gov/files/sharedassets/county/v/1/behavioral-health/compliance/calaim-qa/smartcare-referral-workflow-with-message-template-3.docx> How to Refer the Client to the Managed Care Plan (MCP): [htps://2023.calmhsa.org/how-to-transfer-the-client-to-the-mcp/](https://2023.calmhsa.org/how-to-transfer-the-client-to-the-mcp/)  How to Schedule an Intake Appointment for a Program You Manage: [htps://2023.calmhsa.org/how-to-schedule-an-intake-appointment-for-a-](https://2023.calmhsa.org/how-to-schedule-an-intake-appointment-for-a-program-you-manage/)[program-you manage/](https://2023.calmhsa.org/how-to-schedule-an-intake-appointment-for-a-program-you-manage/)   **Intake and Assessment:** How to Complete the MH Non-Psychiatric SMHS Timeliness Record: [NonPsychiatric Timeliness](https://2023.calmhsa.org/how-to-complete-the-mh-non-psychiatric-smhs-timeliness-record/)  How to Add the Client to Your Program [htps://2023.calmhsa.org/how-to-addthe-client-to-your-program/](https://2023.calmhsa.org/how-to-add-the-client-to-your-program/)  (DO NOT ADD the assigned clinical staff member on this page) PSC 35 Entry (For ages 3-18): [htps://2023.calmhsa.org/pediatric-symptom-checklist-psc/](https://2023.calmhsa.org/pediatric-symptom-checklist-psc/)  CALAIM Assessment Entry: [htps://2023.calmhsa.org/calaim-assessment/](https://2023.calmhsa.org/calaim-assessment/)  Mental Status Exam (MSE) (optional, info can be included within the CALAIM Assessment): [htps://2023.calmhsa.org/mental-status-exam-mse/](https://2023.calmhsa.org/mental-status-exam-mse/)  Child and Adolescent Needs and Strengths (CANS) Tool (For ages 6-20): [htps://2023.calmhsa.org/child-and-adolescent-needs-and-strengths-cans-tool/](https://2023.calmhsa.org/child-and-adolescent-needs-and-strengths-cans-tool/)  How to Complete the MH Psychiatric SMHS Timeliness Record:[htps://2023.calmhsa.org/how-to-complete-the-mh-psychiatric-smhsmeliness-record/](https://2023.calmhsa.org/how-to-complete-the-mh-psychiatric-smhs-timeliness-record/)  [How to Complete a NOABD:](https://2023.calmhsa.org/how-to-complete-a-noabd/) [How to Complete a NOABD - 2023 CalMHSA](https://2023.calmhsa.org/how-to-complete-a-noabd/) | **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]**  |

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| **SmartCare** **EHR Training**SmartCare Clinical (Service, Diagnosis, Problem Lists)  | **Diagnosis Maintenance**: How to Add a Diagnosis: [htps://2023.calmhsa.org/how-to-add-a-diagnosis/](https://2023.calmhsa.org/how-to-add-a-diagnosis/)  How to Delete a Diagnosis: [htps://2023.calmhsa.org/how-to-delete-adiagnosis/](https://2023.calmhsa.org/how-to-delete-a-diagnosis/)  How to Modify and/or Re-Order a Diagnosis: [htps://2023.calmhsa.org/howto-modify-and-or-re-order-a-diagnosis/](https://2023.calmhsa.org/how-to-modify-and-or-re-order-a-diagnosis/)  How to Modify a Diagnosis Aer the Document is Generated: [htps://2023.calmhsa.org/how-to-modify-a-diagnosis-aer-the-document-isgenerated/](https://2023.calmhsa.org/how-to-modify-a-diagnosis-after-the-document-is-generated/)  How to Save a Favorite Diagnosis: [htps://2023.calmhsa.org/how-to-save-afavorite-diagnosis/](https://2023.calmhsa.org/how-to-save-a-favorite-diagnosis/)  How to Pull a Diagnosis Forward from Another Program: [htps://2023.calmhsa.org/how-to-pull-a-diagnosis-forward-from-anotherprogram/](https://2023.calmhsa.org/how-to-pull-a-diagnosis-forward-from-another-program/)  Reordering Diagnoses List: [htps://2023.calmhsa.org/reordering-diagnoses/list/](https://2023.calmhsa.org/reordering-diagnoses-list/)  **Life Cycle of a Client: Services** [How to Write a Progress Note for a Scheduled Service:](https://2023.calmhsa.org/how-to-write-a-progress-note-for-a-scheduled-service/) [htps://2023.calmhsa.org/how-to-write-a-progress-note-for-a-scheduledservice/](https://2023.calmhsa.org/how-to-write-a-progress-note-for-a-scheduled-service/)  [How to Write a Progress Note for an Unscheduled Service](https://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduled-service/): [htps://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduledservice/](https://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduled-service/)  [How to Amend a Note: htps://2023.calmhsa.org/how-to-amend-a-note/](https://2023.calmhsa.org/how-to-amend-a-note/)  [How to Create a Favorite Service Note (or Other Clinical Document):](https://2023.calmhsa.org/how-to-create-a-favorite-service-note-or-other-clinical-document/) [htps://2023.calmhsa.org/how-to-create-a-favorite-service-note-or-otherclinical-document/](https://2023.calmhsa.org/how-to-create-a-favorite-service-note-or-other-clinical-document/): How to Document Treatment Team Meetings e.g. Intensive Care Coordination: [htps://2023.calmhsa.org/how](https://2023.calmhsa.org/how-to-add-an-icd-10-code-to-a-service-before-the-clinician-completes-the-assessment-and-diagnosis/) [to-add-an-icd-10-code-to-a-service-before-the-clinician-completes-theassessment-and-diagnosis/](https://2023.calmhsa.org/how-to-add-an-icd-10-code-to-a-service-before-the-clinician-completes-the-assessment-and-diagnosis/)  Client Abbreviated Notes Report: [htps://2023.calmhsa.org/client-abbreviatednotes-report/](https://2023.calmhsa.org/client-abbreviated-notes-report/)   **Group Documentation:** [How to Set Up a Group:](https://2023.calmhsa.org/how-to-set-up-a-group/) [htps://2023.calmhsa.org/how-to-set-up-a-group/](https://2023.calmhsa.org/how-to-set-up-a-group/)  [How to Add a New Client to a Group: htps://2023.calmhsa.org/how-to-add-anew-client-to-a-group/](https://2023.calmhsa.org/how-to-add-a-new-client-to-a-group/) [How to Add or Change a Staff Member in a Group:](https://2023.calmhsa.org/how-to-add-or-change-a-staff-member-in-a-group/) [htps://2023.calmhsa.org/how-to-add-or-change-a-staff-member-in-a-group/](https://2023.calmhsa.org/how-to-add-or-change-a-staff-member-in-a-group/)  [How to Write a Group Progress Note:](https://2023.calmhsa.org/how-to-write-a-group-progress-note/) [htps://2023.calmhsa.org/how-to-writea-group-progress-note/](https://2023.calmhsa.org/how-to-write-a-group-progress-note/)  [Group Documentation Videos:](https://2023.calmhsa.org/group-documentation-videos/) [htps://2023.calmhsa.org/groupdocumentation-videos/](https://2023.calmhsa.org/group-documentation-videos/)  Comprehensive Group User Guide: <https://www.fresnocountyca.gov/files/sharedassets/county/v/1/behavioral-health/compliance/calaim-qa/group-user-guide.docx> **Problem List Maintenance:** How to Add a Problem to the Problem List: [htps://2023.calmhsa.org/how-toadd-a-problem-to-the-problem-list/](https://2023.calmhsa.org/how-to-add-a-problem-to-the-problem-list/)  How to Remove a Problem That’s Been Resolved: [htps://2023.calmhsa.org/how-to-remove-a-problem-thats-been-resolved/](https://2023.calmhsa.org/how-to-remove-a-problem-thats-been-resolved/)  How to Add Favorites to the Problem List Screen: [htps://2023.calmhsa.org/how-to-add-favorites-to-the-problem-list-screen/](https://2023.calmhsa.org/how-to-add-favorites-to-the-problem-list-screen/)  How to Filter/Sort a Client’s Problem List: [htps://2023.calmhsa.org/how-tofilter-sort-a-clients-problem-list/](https://2023.calmhsa.org/how-to-filter-sort-a-clients-problem-list/)   | **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]** **[ ]**  |

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|  | **Billing Errors:** Service Note Errors and How to Resolve (How to amend before marked complete or billed): [htps://2023.calmhsa.org/servicenote-errors-and-how-to-resolve/](https://2023.calmhsa.org/service-note-errors-and-how-to-resolve/)  How to Report an Individual Service Note Error: [htps://2023.calmhsa.org/how-to-report-an-individual-service-note-error/](https://2023.calmhsa.org/how-to-report-an-individual-service-note-error/)  How to Report a Group Service Note Error (use when you are not able to edit due to note billed): [htps://2023.calmhsa.org/how-toreport-a-group-service-note-error/](https://2023.calmhsa.org/how-to-report-a-group-service-note-error/)  How to Report a State Reporting Error (e.g. CANS/PSC 35): [htps://2023.calmhsa.org/how-toreport-a-state-reporting-error/](https://2023.calmhsa.org/how-to-report-a-state-reporting-error/)   | **[ ]** **[ ]** **[ ]** **[ ]**  |
| **Discharge**  | **Life Cycle of a Client: Discharge**  [How to Close a Client to a Program:](https://2023.calmhsa.org/how-to-close-a-client-to-a-program/) <https://2023.calmhsa.org/how-to-close-a-client-to-a-program/>[How to Get a Summary of Care](https://2023.calmhsa.org/how-to-get-a-summary-of-care/) [htps://2023.calmhsa.org/how-to-get-a-summary-of-care/](https://2023.calmhsa.org/how-to-get-a-summary-of-care/)   | [ ] [ ]  |