



How to Guide Key Phrases

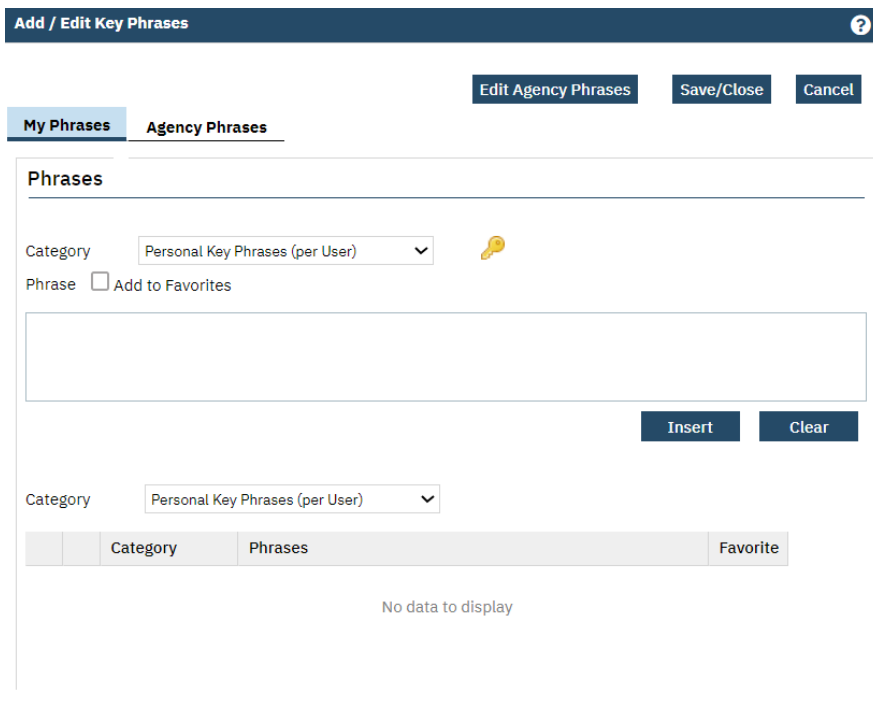
Please Note Key phrases-are available in service notes, assessments, messages and safety/crisis plan.

Things to Know:

- There are multiple categories currently in SmartCare. QI Team is currently only adding Key Phrases in the Personal Key Phrases (per User) and MSE/PE Key Phrases.
- CalMHSA also has a CalMHSA Key Phrases (DO NOT EDIT) category, currently they seem to have only Medication Consent templates. We will let you know if they add more.
- There are no Key Phrases for the Mobile Crisis Safety Plan document. We have informed CalMHSA and asked for it to be added.
- End users can request to an agency phrase to be added by emailing your template to DBH QI for consideration at dbhqualityimprovement@fresnocountyca.gov

Initial Set up: Add a Key Phrase

- 1) Search Messages (My Office), With the Messages (My Office) screen open, click the new icon 
- 2) Click on the Key with a plus sign icon 
- 3) This will bring up the Add/Edit Key Phrases Window




Add / Edit Key Phrases ?

Edit Agency Phrases Save/Close Cancel

My Phrases Agency Phrases

Phrases

Category Personal Key Phrases (per User) 

Phrase Add to Favorites

Insert Clear

Category Personal Key Phrases (per User)

Category	Phrases	Favorite
No data to display		

4) Add the Key Phrase you would like to use in the text box

Add / Edit Key Phrases ?

Edit Agency Phrases Save/Close Cancel

My Phrases Agency Phrases

Phrases

Category Personal Key Phrases (per User)

Phrase Add to Favorites

This is a Key Phrase test

Insert Clear

Category Personal Key Phrases (per User)

Category	Phrases	Favorite
No data to display		

5) Click the “Add to Favorites” check box if you want to add the Key Phrase to your favorites.

6) Click Insert and this will add the Key Phrase to your “Personal Key Phrases (per User)”. You can add multiple Key phrases while in this window.

7) Select Save/Close to save your Personal Key Phrases

Add / Edit Key Phrases ?

Edit Agency Phrases **Save/Close** Cancel

My Phrases Agency Phrases

Phrases


Category Personal Key Phrases (per User)

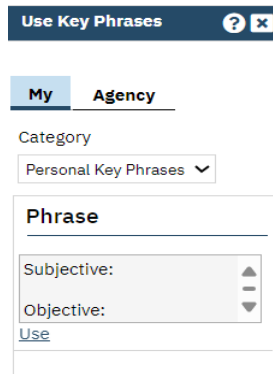
Phrase Add to Favorites


Insert Clear

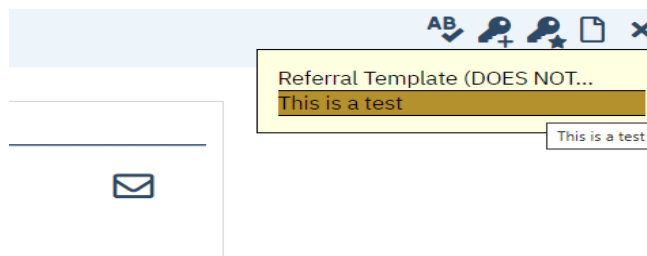
Category Personal Key Phrases (per User)

Category	Phrases	Favorite
✕ <input type="radio"/>	Personal Key Phr... This is a Key Phrase test	Yes
✕ <input type="radio"/>	Personal Key Phr... This is the second key phrase	No

8) Once you set up your Key Phrases you will be able to find them by clicking on the icon  (Key with a star). The “Use Key Phrases” Window will pop up and click on “Use” button to select the key phrase you wish to add to your document.

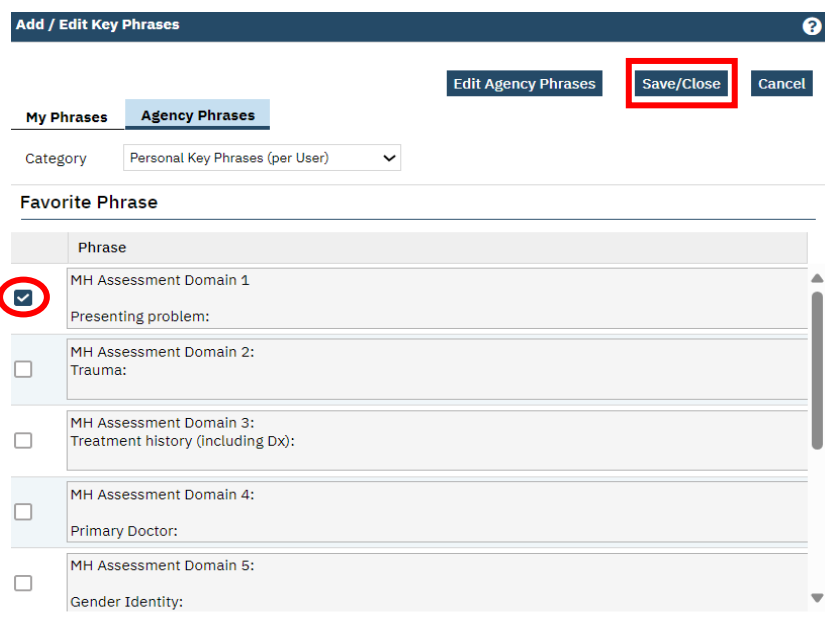


9) If you make it a favorite phrase it will appear when you hover the Key Phrase with a star icon , click on the narrative box you would like to add the text and highlight the key phrase you would like to use.



Adding agency phrase to your favorite

- 1) In the “add/edit key phrases” pop up window
- 2) Click on the “Agency Phrases” tab,
- 3) Select the check box of the phrase/s you want to add then select “save/close.” This phrase should now show up on your “Favorite Phrases” drop down.



Modify a Key Phrase

- 1) In the “add/edit key phrases” pop up window
- 2) Click on the radio button next to the Key Phrase you want to modify, that will bring up the text in the text back
- 3) Make the changes you would like to the text, or the check box for Add to Favorites
- 4) Click Modify, the text will disappear but the changes will be seen at the bottom
- 5) Click Save/Close once you are done.

The screenshot shows the 'Add / Edit Key Phrases' window. At the top right, there are buttons for 'Edit Agency Phrases', 'Save/Close' (highlighted with a red box), and 'Cancel'. Below these are tabs for 'My Phrases' and 'Agency Phrases'. The main area is titled 'Phrases' and contains a 'Category' dropdown set to 'Personal Key Phrases (per User)', a 'Phrase' checkbox checked for 'Add to Favorites', and a text input field containing 'This is a test, changing this'. Below the text field are 'Modify' and 'Clear' buttons, with 'Modify' highlighted by a red box. At the bottom, there is a table with columns for 'Category', 'Phrases', and 'Favorite'.

	Category	Phrases	Favorite
<input checked="" type="radio"/>	Personal Key Phr...	This is a test, changing this	Yes
<input type="radio"/>	Personal Key Phr...	this is another test	No


Deleting a Key Phrase

- 1) In the “add/edit key phrases” pop up window
- 2) Click on the X.
- 3) Click Save/Close once you are done

The screenshot shows the 'Add / Edit Key Phrases' window. At the top right, there are buttons for 'Edit Agency Phrases', 'Save/Close', and 'Cancel'. Below these are tabs for 'My Phrases' and 'Agency Phrases'. The main area is titled 'Phrases' and contains a 'Category' dropdown set to 'Personal Key Phrases (per User)', a 'Phrase' checkbox unchecked for 'Add to Favorites', and an empty text input field. Below the text field are 'Insert' and 'Clear' buttons. At the bottom, there is a table with columns for 'Category', 'Phrases', and 'Favorite'. A red arrow points to the 'X' icon next to the first row of the table. Below the table is a 'Delete' button.

	Category	Phrases	Favorite
<input checked="" type="radio"/>	Personal Key Phr...	This is a Key Phrase test	Yes
<input type="radio"/>	Personal Key Phr...	This is the second key phrase	No

Add a Key Phrase in an Assessment/Service Note/Safety Plan

- 1) Open Assessment/Service Note/Safety Plan
- 2) With the form you are completing click on the icon  (3 dots).
- 3) Click on “Add/Edit Key Phrase”
- 4) If you have the key phrase already, click on the Favorite Phrases, this will bring up the “Use Key Phrases” pop up window, click “use” to on the Key Phrase you would like to use. You can also highlight the Key Phrase on the favorite drop down list.

