

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.

	<u>User Guides</u>	Done
SmartCare Basics: Logging in to SmartCare	User Login Process: Changing Your Password: https://2023.calmhsa.org/changing-your-password/ Setting up Your Security Questions: https://2023.calmhsa.org/setting-up-your-security-questions/ Multi-Factor Authentication: https://2023.calmhsa.org/subsequent-logins/ Login Help: How to Recover Your Username: https://2023.calmhsa.org/how-to-recover-your-username/ How to Reset Your Password: https://2023.calmhsa.org/how-to-reset-your-password/ How to Get Additional Login Assistance: https://2023.calmhsa.org/how-to-get-additional-login-assistance/	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
SmartCare Basics for All Users-Basic Navigation	List Pages: How to Save Filters and/or Create Favorites: https://2023.calmhsa.org/how-to-use-filters/ How to Sort the Columns: https://2023.calmhsa.org/how-to-sort-the-columns/ How to Export Data: https://2023.calmhsa.org/how-to-export-data/ Widgets: Tracking Widget: https://2023.calmhsa.org/widgets/ The Appointments For Today Widget: https://2023.calmhsa.org/the-appointments-for-today-widget/ The Caseload Widget: https://2023.calmhsa.org/the-caseload-widget/ The SmartView: https://2023.calmhsa.org/the-smartview/ Care Team Widget: https://2023.calmhsa.org/care-team-widget/ Services Needing Attention Widget: https://2023.calmhsa.org/services-needing-attention-widget/ Other items: Icons: https://2023.calmhsa.org/icons/ Preferences: https://2023.calmhsa.org/preferences/ Screen vs. Document: https://2023.calmhsa.org/screen-vs-document/ Making a QuickLink : https://2023.calmhsa.org/making-a-quicklink/ https://2023.calmhsa.org/keyphrases-add-edit-permission-only/	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
SmartCare Basics for All Users- Client Search	<u>Client Search</u> How to Use the Client 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/ How to Use the Client Search Window: https://2023.calmhsa.org/how-to-use-the-client-search-window/	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

<p>Consents:</p>	<p>How to Complete a Consent for Telehealth: https://2023.calmhsa.org/how-to-complete-a-consent/</p> <p>How to View What Consents a Client has Signed: https://2023.calmhsa.org/how-to-view-what-consents-a-client-has-signed/</p> <p>How to Document a Revoked Consent: https://2023.calmhsa.org/how-to-document-a-revoked-consent/</p> <p>Minor Consent, Conservatorship, and Guardians: https://2023.calmhsa.org/minor-consent-conservatorship-and-guardians/</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>SmartCare Basics for All Users- Privacy and Consents in SmartCare</p>	<p>Clinical Data Access Group (CDAG):</p> <p>How do I know what CDAG I have? https://2023.calmhsa.org/how-do-i-know-what-cdag-i-have/</p> <p>What happens if I work in both SUD and MH programs? https://2023.calmhsa.org/what-happens-if-i-work-in-both-sud-and-mh-programs/</p> <p>What if the client wants 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/</p> <p>What happens when a client signs the Coordinated Care Consent? https://2023.calmhsa.org/what-happens-when-a-client-signs-the-coordinated-care-consent/</p> <p>What happens when a client revokes their Coordinated Care Consent? https://2023.calmhsa.org/what-happens-when-a-client-revokes-their-coordinated-care-consent/</p> <p>Will I be alerted if a client revokes a consent? https://2023.calmhsa.org/will-i-be-alerted-if-a-client-revokes-a-consent/</p> <p>Coordinated Care Consent & Authorizations to Disclose Confidential Information:</p> <p>How to Complete a Coordinated Care Consent- Coordination of Care completion</p> <p>What do I do if the client wants to revoke their Coordinated Care Consent?: https://2023.calmhsa.org/what-do-i-do-if-the-client-wants-to-revoke-their-coordinated-care-consent/ DO NOT USE AT THIS TIME</p> <p>How to Determine if the Client has Signed a Coordinated Care Consent- Completing a coordination of Care consent</p> <p>How to Document a Release of Information (Authorization to Disclose Confidential Information)- https://2023.calmhsa.org/how-to-document-a-release-of-information-authorization-to-disclose-confidential-information/</p> <p>How to Revoke a Standard Release of Information/Authorization to Disclose Information- https://2023.calmhsa.org/how-to-revoke-a-standard-release-of-information-authorization-to-disclose-information/</p> <p>How to Determine What Disclosure Authorizations (Release of Information) the Client has Signed- https://2023.calmhsa.org/how-to-determine-what-disclosure-authorizations-release-of-information-the-client-has-signed/</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>

	<p>Other consents:</p> <p>How to Complete a Consent for Telehealth- https://2023.calmhsa.org/how-to-complete-a-consent/</p> <p>How to View What Consents a Client has Signed- https://2023.calmhsa.org/how-to-view-what-consents-a-client-has-signed/</p> <p>How to Document a Revoked Consent- https://2023.calmhsa.org/how-to-document-a-revoked-consent/</p> <p>Minor Consent, Conservatorship, and Guardians- https://2023.calmhsa.org/how-to-document-a-revoked-consent/</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Calendar Management	<p>How to Navigate the Staff Calendar: https://2023.calmhsa.org/basic-navigation-of-the-staff-calendar/</p> <p>How to Schedule an Appointment: https://2023.calmhsa.org/how-to-schedule-an-appointment/</p> <p>How to Create an Appointment from Your Calendar- https://2023.calmhsa.org/clinical-documentation/#:~:text=How%20to%20Create%20an,Time%20on%20Your%20Calendar</p> <p>Reception View/Check In: https://2023.calmhsa.org/reception-view/</p> <p>How to Reschedule a Client's Appointment- https://2023.calmhsa.org/how-to-reschedule-a-clients-appointment/</p> <p>How to Cancel a Client's Appointment- https://2023.calmhsa.org/how-to-cancel-a-clients-appointment/</p> <p>How to Create a Recurring Individual Service Appointment- https://2023.calmhsa.org/how-to-create-a-recurring-individual-service-appointment-2/</p> <p>How to Document Quality Improvement and Other Administrative Billable Time- https://2023.calmhsa.org/how-to-document-quality-improvement-and-other-administrative-billable-time/</p> <p>How to Document a No-Show Appointment- https://2023.calmhsa.org/how-to-document-a-no-show-appointment/</p> <p>How to Schedule Non-Client Time on Your Calendar- https://2023.calmhsa.org/how-to-schedule-non-client-time-on-your-calendar/</p> <p>How to Schedule a Follow-up Appointment: https://2023.calmhsa.org/how-to-schedule-a-follow-up-appointment/</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

**SmartCare
EHR Training-
SmartCare
Clinical
Workflow
(Request to
Assessment)**

Request for Services

Request for Services/Creating Client Chart: <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



Smartcare Referral
Workflow- General.do

How to Refer the Client to the Managed Care Plan (MCP):

<https://2023.calmhsa.org/how-to-transfer-the-client-to-the-mcp/>

How to Schedule an Intake Appointment for a 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: [Non-Psychiatric Timeliness](#)

How to Add the 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: <https://2023.calmhsa.org/pediatric-symptom-checklist-psc/>

CALAIM Assessment Entry: <https://2023.calmhsa.org/calaim-assessment/>

Mental Status Exam (MSE): <https://2023.calmhsa.org/mental-status-exam-mse/>

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:

<https://2023.calmhsa.org/how-to-complete-the-mh-psychiatric-smhs-timeliness-record/>

	<p>Diagnosis Maintenance:</p> <p>1) How to Add a Diagnosis: https://2023.calmhsa.org/how-to-add-a-diagnosis/</p> <p>2) How to Delete a Diagnosis: https://2023.calmhsa.org/how-to-delete-a-diagnosis/</p> <p>3) How to Modify and/or Re-Order a Diagnosis: https://2023.calmhsa.org/how-to-modify-and-or-re-order-a-diagnosis/</p> <p>4) How to Modify a Diagnosis After the Document is Generated: https://2023.calmhsa.org/how-to-modify-a-diagnosis-after-the-document-is-generated/</p> <p>5) How to Save a Favorite Diagnosis: https://2023.calmhsa.org/how-to-save-a-favorite-diagnosis/</p> <p>6) How to Pull a Diagnosis Forward from Another Program: https://2023.calmhsa.org/how-to-pull-a-diagnosis-forward-from-another-program/</p> <p>7) Reordering Diagnoses List: https://2023.calmhsa.org/reordering-diagnoses-list/</p> <p>Error Reporting:</p> <p>1) Service Note Errors and How to Resolve: https://2023.calmhsa.org/service-note-errors-and-how-to-resolve/</p> <p>2) How to Report an Individual Service Note Error: https://2023.calmhsa.org/how-to-report-an-individual-service-note-error/</p> <p>3) How to Report a Group Service Note Error: https://2023.calmhsa.org/how-to-report-a-group-service-note-error/</p> <p>4) How to Report a State Reporting Error: https://2023.calmhsa.org/how-to-report-a-state-reporting-error/</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Discharge	<p>Life Cycle of a Client: Discharge</p> <p>How to Close a Client to a Program: https://2023.calmhsa.org/how-to-close-a-client-to-a-program/</p> <p>How to Get a Summary of Care https://2023.calmhsa.org/how-to-get-a-summary-of-care/</p>	<input type="checkbox"/> <input type="checkbox"/>