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

Consents:	How to Complete a Consent for Telehealth: https://2023.calmhsa.org/how-to-	
Conscitts.	complete-a-consent/	
	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: https://2023.calmhsa.org/how-to-	
	document-a-revoked-consent/	
	Minor Consent, Conservatorship, and Guardians:	
	https://2023.calmhsa.org/minor-consent-conservatorship-and-guardians/	
SmartCare	Clinical Data Access Group (CDAG):	
Basics for All	How do I know what CDAG I have? https://2023.calmhsa.org/how-do-i-know-	
Users- Privacy	what-cdag-i-have/	
and Consents	What happens if I work in both SUD and MH programs?	_
in SmartCare	https://2023.calmhsa.org/what-happens-if-i-work-in-both-sud-and-mh-	
in omarceare	programs/	_
	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/	<del></del>
	What happens when a client signs the Coordinated Care Consent?	
	https://2023.calmhsa.org/what-happens-when-a-client-signs-the-coordinated-	
	care-consent/	<del></del>
	What happens when a client revokes their Coordinated Care Consent?	
	https://2023.calmhsa.org/what-happens-when-a-client-revokes-their-	
	coordinated-care-consent/	<u> </u>
	Will I be alerted if a client revokes a consent? https://2023.calmhsa.org/will-i-	
	be-alerted-if-a-client-revokes-a-consent/	
	Coordinated Care Consent & Authorizations to Disclose Confidential	
	Information:	
	How to Complete a Coordinated Care Consent- Coordination of Care completion	
	What do I do if the client wants to revoke their Coordinated Care Consent?:	Ш
	https://2023.calmhsa.org/what-do-i-do-if-the-client-wants-to-revoke-their-	
	coordinated-care-consent/ DO NOT USE AT THIS TIME	<del></del>
	How to Determine if the Client has Signed a Coordinated Care Consent-	
	Completing a coorindation of Care consent	
	How to Document a Release of Information (Authorization to Disclose	<del></del>
	Confidential Information)- 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- https://2023.calmhsa.org/how-to-revoke-a-standard-release-of-	
	information-authorization-to-disclose-information/	<del></del>
	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/	<del></del>
	1	

	Other consents:	
	How to Complete a Consent for Telehealth- https://2023.calmhsa.org/how-to-	
	complete-a-consent/	<del></del>
	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- https://2023.calmhsa.org/how-to-	
	document-a-revoked-consent/	<u> </u>
	Minor Consent, Conservatorship, and Guardians-	
	https://2023.calmhsa.org/how-to-document-a-revoked-consent/	
Calendar	How to Navigate the Staff Calendar: <a href="https://2023.calmhsa.org/basic-navigation-">https://2023.calmhsa.org/basic-navigation-</a>	
Management	of-the-staff-calendar/	
	How to Schedule an Appointment: <a href="https://2023.calmhsa.org/how-to-schedule-">https://2023.calmhsa.org/how-to-schedule-</a>	
	an-appointment/	
	How to Create an Appointment from Your Calendar-	
	https://2023.calmhsa.org/clinical-	
	documentation/#:~:text=How%20to%20Create%20an,Time%20on%20Your%20C	
	<u>alendar</u>	
	Reception View/Check In: <a href="https://2023.calmhsa.org/reception-view/">https://2023.calmhsa.org/reception-view/</a>	
	How to Reschedule a Client's Appointment- <a href="https://2023.calmhsa.org/how-to-">https://2023.calmhsa.org/how-to-</a>	
	reschedule-a-clients-appointment/	
	How to Cancel a Client's Appointment- <a href="https://2023.calmhsa.org/how-to-">https://2023.calmhsa.org/how-to-</a>	ш
	cancel-a-clients-appointment/	
	How to Create a Recurring Individual Service Appointment-	
	https://2023.calmhsa.org/how-to-create-a-recurring-individual-service-	
	appointment-2/	
	How to Document Quality Improvement and Other Administrative Billable Time-	
	https://2023.calmhsa.org/how-to-document-quality-improvement-and-other-	
	administrative-billable-time/	
	How to 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-	$\coprod$
	https://2023.calmhsa.org/how-to-schedule-non-client-time-on-your-calendar/	
	How to Schedule a Follow-up Appointment: <a href="https://2023.calmhsa.org/how-to-all-addition-of-law-up-appointment">https://2023.calmhsa.org/how-to-addition-of-law-up-appointment</a>	
	schedule-a-follow-up-appointment/	

SmartCare	Request for Services	
EHR Training-	Request for Services/Creating Client Chart: https://2023.calmhsa.org/how-to-	
SmartCare	document-a-call-when-you-dont-provide-services-yourself/	
Clinical		
Workflow	Screening	
(Request to	How to Refer the Client to the County's (MHP) System of Care	
Assessment)	Smartcare Referral Workflow- General.do  How to Refer the Client to the Managed Care Plan (MCP): <a href="https://2023.calmhsa.org/how-to-transfer-the-client-to-the-mcp/">https://2023.calmhsa.org/how-to-transfer-the-client-to-the-mcp/</a> How to Schedule an Intake Appointment for a Program You Manage: <a href="https://2023.calmhsa.org/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/</a>	
	Intake and Assessment:	
	How to Complete the MH Non-Psychiatric SMHS Timeliness Record: Non-	
	Psychiatric Timeliness  Llow to Add the Client to Your Program https://2022.colmbse.org/how to add	
	How to Add the Client to Your Program <a href="https://2023.calmhsa.org/how-to-add-the-client-to-your-program/">https://2023.calmhsa.org/how-to-add-the-client-to-your-program/</a> (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/	$\vdash$
	Mental Status Exam (MSE): https://2023.calmhsa.org/mental-status-exam-mse/	$\overline{}$
	Child and Adolescent Needs and Strengths (CANS) Tool:	一
	https://2023.calmhsa.org/child-and-adolescent-needs-and-strengths-cans-tool/	<u>I                                    </u>
	How to Complete the MH Psychiatric SMHS Timeliness Record:	
	https://2023.calmhsa.org/how-to-complete-the-mh-psychiatric-smhs-	<del></del>
	timeliness-record/	

SmartCare	Life Cycle of a Client: Services	
EHR Training-		
SmartCare	How to Write a Progress Note for a Scheduled Service:	
Clinical	https://2023.calmhsa.org/how-to-write-a-progress-note-for-a-scheduled-	
(Service,	service/	
Diagnosis,	How to Write a Progress Note for an Unscheduled Service:	Ш
Problem Lists)	https://2023.calmhsa.org/how-to-write-a-progress-note-for-an-unscheduled-	
	service/	
	How to Amend a Note: https://2023.calmhsa.org/how-to-amend-a-note/	ᆜ
	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/	
	https://2023.calmhsa.org/how-to-document-treatment-team-meetings/ e.g.	
	Intensive Care Coordination	
	How to Document Treatment Team Meetings: https://2023.calmhsa.org/how-	Ш
	to-add-an-icd-10-code-to-a-service-before-the-clinician-completes-the-	
	assessment-and-diagnosis/	
	Client Abbreviated Notes Report: https://2023.calmhsa.org/client-abbreviated-	
	notes-report/	
	Con a Base manufaltar	
	Group Documentation	
	How to Set Up a Group: https://2023.calmhsa.org/how-to-set-up-a-group/	H
	How to Add a New Client to a Group: https://2023.calmhsa.org/how-to-add-a-	ш
	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/	
	How to Write a Group Progress Note: <a href="https://2023.calmhsa.org/how-to-write-agroup progress">https://2023.calmhsa.org/how-to-write-agroup progress</a>	
	a-group-progress-note/	
	Group Documentation Videos: <a href="https://2023.calmhsa.org/group-documentation-videos/">https://2023.calmhsa.org/group-documentation-videos/</a>	
	6) Comprehensive Group User Guide:	
	<b>W</b> ≡	
	Group User	
	Guide.docx	
	Problem List Maintenance:	
	1) How to Add a Problem to the Problem List: <a href="https://2023.calmhsa.org/how-to-">https://2023.calmhsa.org/how-to-</a>	
	add-a-problem-to-the-problem-list/	
	2) How to Remove a Problem That's Been Resolved:	
	https://2023.calmhsa.org/how-to-remove-a-problem-thats-been-resolved/	
	3) How to Add Favorites to the Problem List Screen:	
	https://2023.calmhsa.org/how-to-add-favorites-to-the-problem-list-screen/	$\sqsubseteq$
	4) How to Filter/Sort a Client's Problem List: <a href="https://2023.calmhsa.org/how-to-">https://2023.calmhsa.org/how-to-</a>	
	filter-sort-a-clients-problem-list/	

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