SmartCare Walk In Workflow

Contents

Client Search/Inquiry/New Client

In SmartCare the proper sequence when receiving a new client is to:

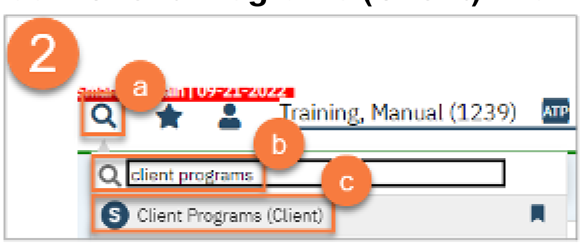
1. Open an Inquiry with Contact Type “Walk In”
2. Search for the client to see if they are already in the system
3. Complete the Inquiry
4. Create the client if they were not already in the system

Requested Program Enrollment

Client must have at least a Requested Program Enrollment to document any further. Making the Enrollment “Requested” allows you to screen the client without having them fully enrolled in your program.

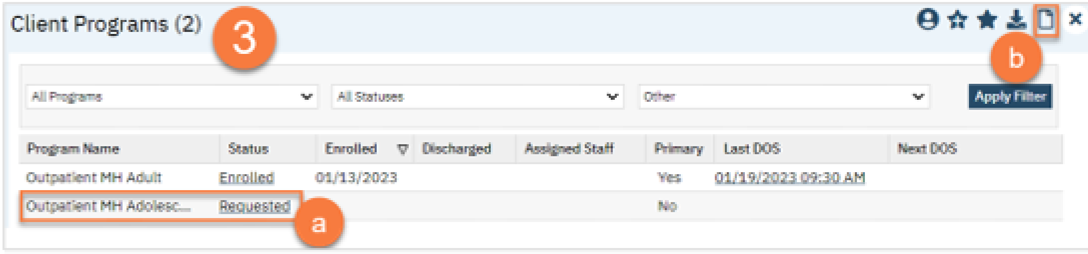
1. **Open the client’s record**, if not already done so. You can do this using the Client Search screen.

2. Open the Client Programs list page.
    a. Click the Search icon.
    b. **Type “Client Program”** in the search bar.
    c. **Select “Client Programs (Client)”** from the search results.

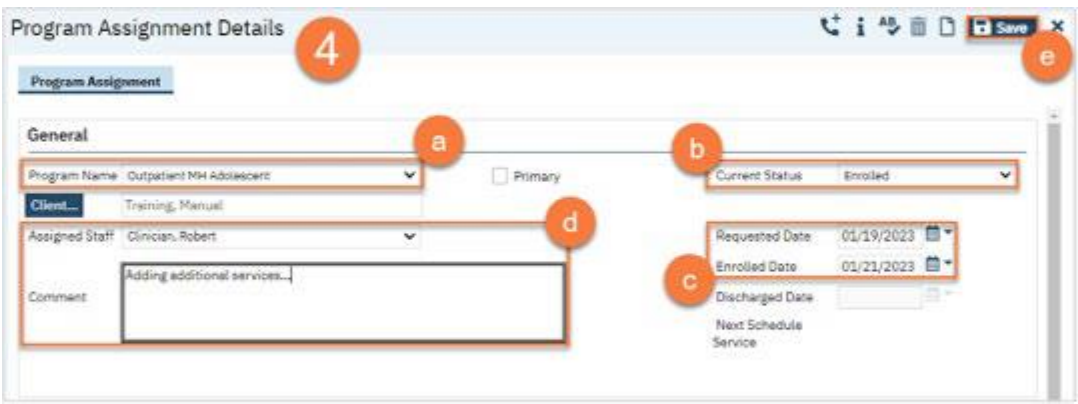


3. This opens the Client Programs list page**.**
    a. If your program is on the list, **click on the link in the Status column**. The status is likely Requested, if the process has been started. If the status is Discharged, do not edit this enrollment and instead add your program as if it’s a new program by clicking on the New icon.

b. If your program is not on the list, **click on the New icon**.



4. Complete the Client Program Details screen.
   a. If not already done so, **select your program** from the dropdown menu.
   b. **Enter the status of the program as "Requested".**
   c. **Enter the Requested date.** This will be today's date.
   d. **If known, enter the assigned staff.** You can also enter any comments related to this requested program enrollment.
   e. **Click Save**.



Intake

Crisis Screening

If you complete the Crisis Assessment in SmartCare, follow these instructions.

1. **With the client open, click the Search icon.**
2. **Type "Crisis Assessment"** in the search bar.
3. **Select "Crisis Assessment (Client)"** from the search results.
4. The CDAG Program Enrollment window will popup. **Select your program.**
5. **Click OK.**
6. This will bring you to the Crisis Assessment document screen.
   a. If you are completing the assessment after the fact, or are entering in the answers from a paper version, **make sure your effective date is the date the assessment actually took place**.

7. When you are finished with the document, **click Sign**. If you have missed any fields, the system will alert you to what needs to be completed.
8. This will bring you to the PDF. You may now **click the Close icon**.

SUD: BQUIP

How to Complete a BQuIP SUD Screening Tool

Timeliness

SmartCare has 4 Timeliness documents available

How to Complete the MH Non-Psychiatric SMHS Timeliness Record
How to Complete the MH Psychiatric SMHS Timeliness Record
How to Complete the DMC Opioid Timeliness Record
How to Complete the DMC Outpatient Timeliness Record

SUD – CalOMS

How to Complete a CalOMS Admission
How to Complete a CalOMS Referral/Transfer

MH – CSI Standalone Collection

CSI data is necessary for billing purposes, complete this form as How to Complete a CSI Demographic Record

Service Entry

How to Write a Progress Note for an Unscheduled Service

MH – Assessment

Assessment Procedure used will depend on which staff performs the screening.

1. Assessment LPHA
2. Assessment Contribution non-LPHA

SUD – SUD Screening

SUD Screening

Walk In Outcome

Either Change Program Enrollment Status to “Enrolled” or “Discharge”.
How to Add the Client to Your Program
How to Close a Client to a Program