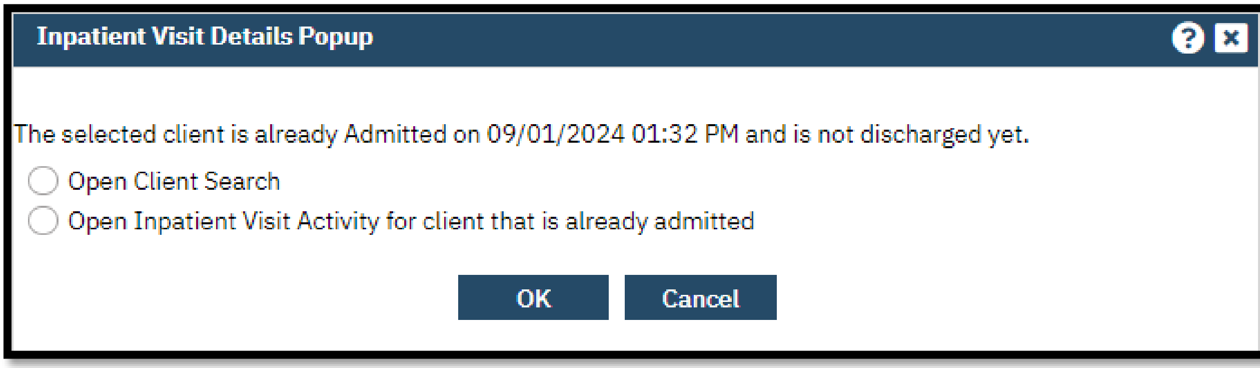
INTERIM: SmartCare CSU with Concurrent Program Enrollment Supplementary Guide

Contents

CSU With Program Enrollment Supplementary Guide

SmartCare is currently configured to prevent duplicate admissions to certain programs. It will not allow a client to be admitted to a CSU using the Bedboard if the client is currently admitted to a Residential Program. This pop up will appear.



It is not always possible for CSU staff to identify which program the client may be admitted to and it may not be possible for the residential program to make the changes necessary to the client's record to make it possible to admit them to the CSU in the usual way. Care and documentation should not be delayed. In this case, click Cancel in the message above and follow the steps below.

Open Client to Your Program

1. Open the client's record, if not already done. 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.
3. Select "Client Programs (Client)" from the search results.
   This opens the Client Programs list page. Ensure that the client is not already enrolled in your program. If your program is not on the list, click on the New icon.
4. Complete the Client Program Details screen.
    a. Select your program from the dropdown menu.
    b. Enter the status of the program as "enrolled".
    c. Enter the enrollment date and time. This is the start date and time of your CSU service.
    d. If known, enter the assigned staff. You can also enter any comments related to this program enrollment.

e. Click Save.

Everything in the Orders, Intake and Documentation sections below are the same as a normal admission except the Safety Check Order. It has been included here for reference.

Please see the Discharge and Service Entry sections below for the correct way to complete this workflow.

Orders

Safety Check Order

Since the Bedboard wasn't used to admit the client, the client will not appear on the Whiteboard. Safety Check Order is unnecessary. Conduct Safety Checks using downtime procedures or paper charting which can be scanned into the chart.

Legal Status Order

How to Place a Legal Status Order in Client Orders

Intake

CSI Standalone Collection

How to Complete a CSI Demographic Record

Documentation

NOTE: None of the Services/Notes mentioned in the Documentation section will generate any charges for the CSU Stay. To enter this service see: Service Entry

LPHA/Non-LPHA

1. Diagnosis Document (LPHA)
   How to Add a Diagnosis
   How to Delete a Diagnosis
   How to Modify and/or Re-Order a Diagnosis
   How to Modify a Diagnosis After the Document is Generated
   How to Save a Favorite Diagnosis
   How to Pull a Diagnosis Forward from Another Program
   Reordering Diagnoses List

2. Problem List
   [How to Add a Problem to the Problem List]
   [How to Remove a Problem That's Been Resolved]
   [How to Add Favorites to the Problem List Screen]
   [How to Filter/Sort a Client's Problem List]
3. Crisis Assessment
   If you complete the Crisis Assessment in SmartCare, follow these instructions.
   a. With the client open, click the Search icon.
   b. Type "Crisis Assessment" in the search bar.
   c. Select "Crisis Assessment (Client)" from the search results.
   d. The CDAG Program Enrollment window will popup. Select your program.
   e. Click OK.
   f. This will bring you to the Crisis Assessment document screen.
      i. 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.
   g. 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.
   h. This will bring you to the PDF. You may now click the Close icon.
4. MSE
   [Mental Status Exam (MSE)]
5. Safety
   a. Risk Assessment (if applicable)
      i. With the client open, click the Search icon
      ii. Type "Risk Assessment (client)" in the search bar
      iii. Select "Risk Assessment (client)" from the search results
      iv. The CDAG Program Enrollment window will popup. Select the appropriate program with the enrollment date that matches the dispatch date.
      v. Click OK.
      vi. This will bring you to the Risk Assessment document screen. Complete the entire document.
      vii. If you are completing the Risk 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.
      viii. When you are finished with the document, click Sign.
      ix. This will bring you to the PDF. You may now click the Close icon.
   b. Safety/Crisis Plan (if applicable)

How to Complete the Safety Plan

6. Valuables and Belongings

   How to Complete the Personal Effects Inventory (PEI)
7. Safety Checks (Whiteboard)
   a. Click the Search icon
   b. Type Whiteboard in the search bar
   c. Click to select Whiteboard (My Office)
   d. Click the time link to the next Safety Check in the Next Check column
   e. The Flowsheet Detail Popup screen will open
      i. Date/Time
         1. Ensure the correct Date/Time is entered
      ii. Safety Check
         1. Select Status Complete
         2. If the Check was performed by another Staff, change the Completed by to the correct name
         3. Enter a comment if applicable
      iii. Current Behavior / Client Status
         1. Select Status
         2. Select Activity
         3. Select Location
         4. Other/Comments free text as applicable
   f. Click Save & Close when finished
   g. Cancel without saving if needed
   h. Safety Checks can be reviewed in the Flow Sheet
8. Services/Notes – Procedure: Shift Summary

   How to Document an End of Shift Summary
9. Care Plan
10. 72 Hour Follow Up Call

    How to Write a Progress Note for an Unscheduled Service

    Procedure: Brief Contact Note

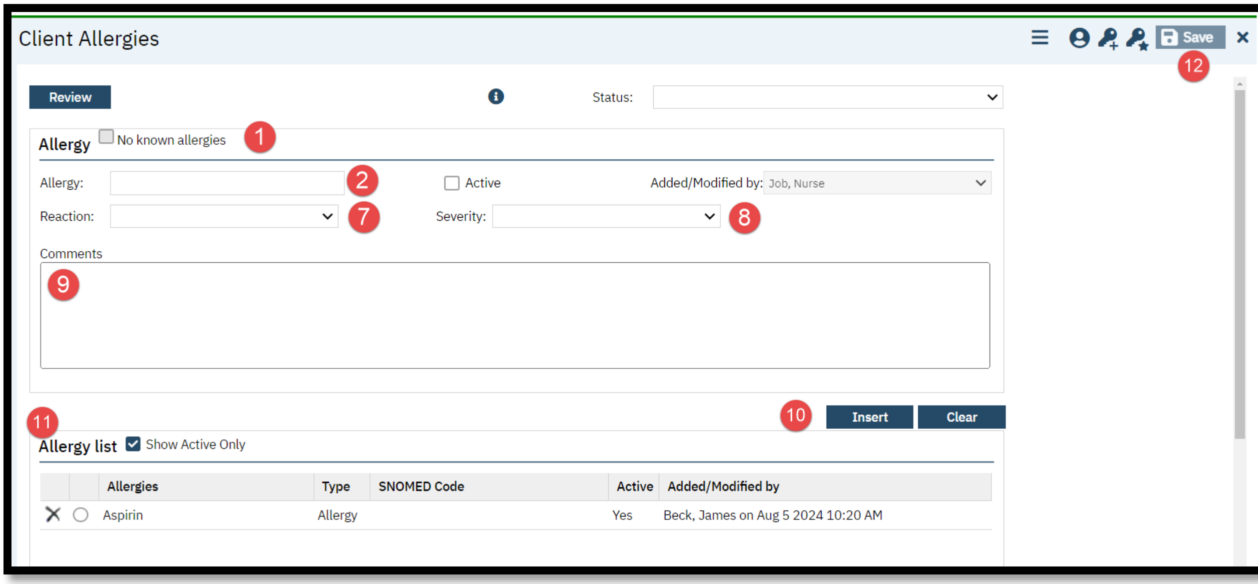
Nursing

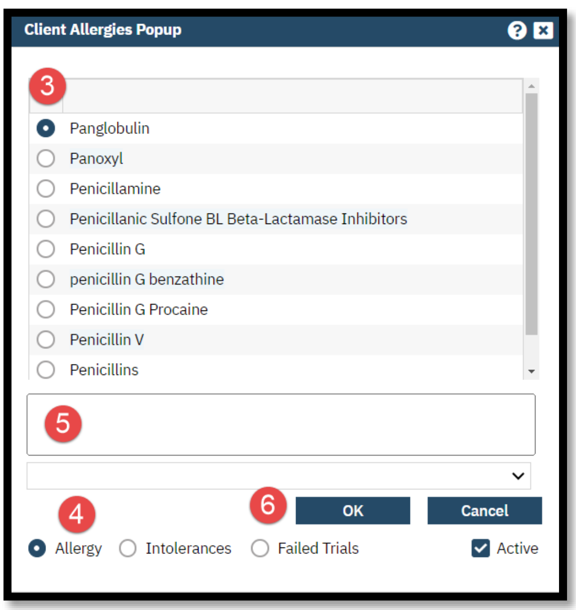
1. Home medications

   Dr First training separate
2. Allergies
   a. To view Allergies

      Allergies (Client) List Page
   b. To enter Allergies

i. Click on the Search icon, with the client open
ii. Type “Client Allergies (Client)” in the search bar
iii. Select “Client Allergies (Client)” from the search results
iv. This will bring up the Client Allergies Screen





1. If client has No Known Allergies, check the box for No known allergies
2. If the client reports an allergy, type the allergy in the Allergy field and hit Enter.
3. Choose the correct substance in the Client Allergies Popup
4. Choose Allergy / Intolerances / Failed Trials
5. Enter a comment if needed

6. Click OK when finished
7. Enter a Reaction
8. Enter a Severity
9. Comments from (5) appear here, edit if needed
10. Click Insert
11. Allergy will appear in Allergy list
12. Click Save when finished

3. History and Physical form does not share documentation with other notes/assessments
   History and Physical Standalone Form
4. Vitals
   How to Document Vitals
5. AIMS
   How to Complete the AIMS Assessment
6. Review MAR/Chart medications - Dr First training separate
7. Services/Notes – Procedure: Nursing Assessment
   Psych/Medical Note Training
   How to Complete the Psych/Medical Note
8. Other Services/Notes
   How to Write a Progress Note for an Unscheduled Service
   a. Procedure: Nurse Progress Note – Incident Documentation
   b. Procedure: Shift Summary – End of shift documentation if program requires

Prescriber

1. Review Client Information
2. Diagnosis Document (if applicable)
   How to Add a Diagnosis
   How to Delete a Diagnosis
   How to Modify and/or Re-Order a Diagnosis
   How to Modify a Diagnosis After the Document is Generated
   How to Save a Favorite Diagnosis
   How to Pull a Diagnosis Forward from Another Program
   Reordering Diagnoses List
3. Assessment
   Procedure: Prescriber Assessment E/M (OP) [90792]
   Psych/Medical Note Training
   How to Complete the Psych/Medical Note
4. Medication Reconciliation

Dr First training separate

Discharge

Update CSI

[How to Complete a CSI Demographic Record]

CalMHSA Discharge Summary

[How to Complete the Discharge Summary]

Discharge

1. Make sure you have the client open. Then click the Search icon.
2. Type in “Client Programs” in the search bar.
3. Click on “Client Programs (Client)” in the search results.
4. This brings you to the Client Programs list page. Select the program you want to close to by clicking on the “Enrolled” link in the Status column.
5. This brings you to the Program Details screen.
   a. Change the status to “Discharged”. This unlocks the Discharge Date field.
   b. Enter the Discharge Date.
   c. Enter the Discharge Time.
6. Click Save.

Service Entry

First 23 hours - Crisis Stabilization Service

Manual entry of the Crisis Stabilization Service is completed by creating a Service for the visit. This is the only Service entry which will generate a charge for the CSU stay. The service should be entered as soon after the client leaves as possible. There is no note associated with this service. All progress notes should have been entered using the documentation information above.

1. With the client selected, Click the Search icon.
2. Type ‘Services’ into the search bar.
3. Click to select Services (Client). The Services list page will open.
4. Select the New icon from the tool bar. A new Service Detail page opens.
5. Change the status to Show.

6. Enter the start date and time. This should be the same as the Enrollment date and time. You may see a warning that states the client is not enrolled in the program. This will not prevent you from entering the service.
7. Enter the following in this order:
    a. Clinician: Select the Prescriber for your facility for that day
    b. Select the Program from the dropdown.
    c. Select the Procedure from the dropdown.
        1. Crisis Stabilization – Emergency Room Services
        2. Crisis Stabilization Unit
8. Enter Service Time. For this service, it is in hours. Round to the nearest hour. If the time is less than 30 minutes, enter a zero.
9. Select the Location from the dropdown.
    a. Emergency Room – Hospital
    b. Urgent Care Facility
10. Enter Mode of Delivery: Face to Face
11. Enter appropriate Evidence Based Practices
12. Billing Diagnosis Tab: the diagnoses entered on the diagnosis form should appear here.
13. Click the Save and Close buttons.

The Crisis Stabilization service is now created and billing jobs will complete the service.

23 hours and beyond – Client Non Billable Srvc Must Document

Only the first 23 hours of care are billable to Medi-Cal. Everything over 23 hours must be entered using a different service to accurately document the facility's time spent with the client.

1. Navigate back to the Services (Client) screen if not already there.
2. Select the New icon from the tool bar. A new Service Detail page opens.
3. Change the status to Show.
4. Enter the start date and time. This should be the time at the end of the first 23 hours. You may see a warning that states the client is not enrolled in the program. This will not prevent you from entering the service.
5. Enter the following in this order:
    a. Clinician: Select the Prescriber for your facility for that day
    b. Select the Program from the dropdown.
    c. Select the Procedure from the dropdown.
        1. Client Non Billable Srvc Must Document

6. Enter Service Time. For this service, it is in minutes. Calculate the minutes beyond 23 hours. If it was 2 hours and 45 minutes this would be 165 minutes.
7. Select the Location from the dropdown.
    a. Emergency Room – Hospital
    b. Urgent Care Facility
8. Enter Mode of Delivery: Face to Face
9. Enter appropriate Evidence Based Practices
10. Billing Diagnosis Tab: the diagnoses entered on the diagnosis form should appear here.
11. Click the Save and Close buttons.