

<b>Category:</b>	<b>Subject:</b> Diagnostic Procedures Reports, Medical Records & Physical Exams
<b>Behavioral Health</b>	<b>Scope:</b> SLO Behavioral Health Department
	<b>Effective Date:</b> 7/01/2023

**Purpose:**

To facilitate obtaining and tracking routine laboratory results & physical exams as part of a standard of care for medication services, until Lab Interface Connection or equivalent is functional in SmartCare.

**Procedure:**

1. Any diagnostics procedures reports including lab reports, medical records or physical exam received.
2. HIT sets:
  - a. For Labs-“Laboratory Received to be Reviewed” client flag for MD/DO/NP to review.
  - b. For Physical Exam- “Physical Exam Received” client flag for MD/DO/NP to review.
  - c. For Medical Records- “Medical Records Received to be Reviewed” client flag for MD/DO/NP to review.
3. Flag set-up: Choose the correct **Type** (Laboratory Received to be Reviewed; Physical Exam Received; or Medical Records Received to be Reviewed.) **Level**=Information **Program**=Select your program **Note**=date and type of record to be reviewed **Display Date**=date you are creating flag **Due Date**=2 days from Display Date **Assigned Users**=Prescriber (add LPT if lab received for Clozapine client) **Assigned Roles**=type in Psychiatrist to display drop-down for selection; type in Clinician to display drop-down for selection

Client Flag Details

**Note Information**

Type: Laboratory Received to be Reviewed ID: 1000009 Work Group: [ ]  Active

Level: Information Protocol: [ ] Protocol Flag ID: [ ] Program: TMHA Generic Client Only A

Note: 7/14/2023 Lab to be reviewed  This flag recurs

Open Date: [ ] Display Date: 07/12/2023 Due Date: 07/14/2023 End/Completed Date: [ ]

Completed By: [ ]

Link to:  Nothing  Document [ ] [Open](#)

Assigned Users: [ ] Assigned Roles: [ ]

Dewitt, Jayana Michelle  Psychiatrist/Prescriber  
 Roberts, Erin L  Primary Clinician\*

Comment: [ ]

4. Scan lab, physical exam, or any medical records and attach in electronic health record.
5. Notify MD/NP/DO or designee (via email, SmartCare messaging, or place in their inbox, depending on preference.)
  - a. a. **For Mental Health if Clozapine**, notify both LPT/RN/LVN & MD/NP/DO (via email, SmartCare messaging, or place in their inbox, depending on preference.)
6. For DAS Physical Exam, Drug & Alcohol Labs, Medical Records requirements, the documents can be scanned in, and the designated Medical Provider and site HIT (to monitor for compliance) can be assigned.
7. MD/NP/DO reviews lab in Documents (Client) screen.
8. MD/NP/DO & LPT/RN/LVN-On Staff’s Dashboard, go to the Tracking Widget. Locate and click on the appropriate flag. List page will open.

Tracking Widget i ↓ ↻

Workgroup: All Workgroups | 
  Assigned: Seaman, Kimberly | 
 Tracking Protocol: All Flags | 
  Tx Team Role: All Assigned Roles

Flags Tracked	Due in 90-61 Days	Due in 60-31 Days	Due in 30 Days or Less	Overdue
<a href="#">Laboratory Received to be Reviewed</a>	0	0	10	0
<a href="#">Medical Records Received to be Reviewed</a>	0	0	2	0

9. Find client and click on flag to open Client Flag Details screen.

Client Flag Details ⓘ ⚙️ 🗑️ 📄 💾 Save ✕

**Note Information**

Type: Laboratory Received to be Reviewed | ID: 1000009 | Work Group:  |  Active

Level: Information | Protocol:  | Protocol Flag ID:  | Program: B&C Generic Clients Only (4)

Note: 7/14/23 lab to be reviewed |  This flag recurs

Open Date:  | Display Date: 07/14/2023 | Due Date: 07/16/2023 | End/Completed Date:

Link to:  Nothing |  Document:  | Open:  | Assigned Users:  | Assigned Roles:

✕ Dewitt, Jayana Michelle | No data to display

Comment:

Permitted Flag |  Do not display flag |  Never Pop Up |  Always Pop Up

Modify Clear

10. MD/NP/DO notates in the Comment section in Client Flag Details screen and assigns LPT/RN/LVN or appropriate staff to review or follow up, by adding them to the Assigned Users field. If review/follow-up is not needed from additional staff, MD/NP/DO will complete the flag by entering in End/Completed Date and Completed By information in the Client Flag Details screen. After editing this screen, click Modify, Save, and X to close.

11. LPT/LVN/RN will review and notate REMS information (for Clozapine clients) and/or follow-up completed in the Comment section in Client Flag Details screen. (Follow steps 8 & 9 to locate/access flag.) LPT/RN/LVN will complete the flag by entering in End/Completed Date and Completed By information in the Client Flag Details screen. After editing this screen, click Modify, Save, and X to close.

12. For DAS Physical Exam, Drug & Alcohol Labs, Medical Records requirements, the designated Medical Provider will end/complete the flag.

**Location of Items:**

**M:\HealthInformation\Health Information Procedures\How to & Guidance SmartCare\HIT How to Create-Modify-Complete a Client Flag**

**Revision History**

Date:	Section Revised:	Details of Revision:
7-1-23	Original	
7-14-23	Revised	Instructions added to locate & complete flag.