Category:	Subject: Diagnostic Procedures Reports, Medical Records & Physical Exams
Behavioral Health	**Scope:** SLO Behavioral Health Department
	Effective Date: 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

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

Flags Tracked	Due in 90-61 Days	Due in 60-31 Days	Due in 30 Days or Less	Overdue
Laboratory Received to be Reviewed	0	0	10	0
Medical Records Received to be Reviewed	0	0	2	0

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

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.