

County: CalMHSA Sample

This is an EXAMPLE from CalMHSA of what a potential Inpatient workflow may look like within Smart Care. We need to map what the CSU workflows will likely look like in SmartCare. If possible – please use this template to create what you think the CSU workflow will look like. Please reach out to Molly Heintz (mheintz@co.slo.ca.us) (805)781-5516 or Melissa Soares (msoares@co.slo.ca.us) (805)781-1915 with questions.

	Pre-Admit	Admission/Intake	Services/Orders	Discharge
Administrative Tasks	<ul style="list-style-type: none"> Identify the client (select or create the client) [Client Search] Request program enrollment [Client Programs] Schedule admission [Bedboard] Request prior authorization [TBD] Document referral [Inquiry] 	<ul style="list-style-type: none"> Admit client to a bed [Bedboard] Intake documents (informational materials, admission agreement, etc.) [multiple] Personal Effects Inventory [Personal Effects Property Inventory] 	<ul style="list-style-type: none"> Request ongoing authorization [TBD] 	<ul style="list-style-type: none"> Provides client with Aftercare plan [TBD] Schedules follow-up appointments [Staff Calendar; Appointment Search]
Nursing Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Nursing Assessment [Nursing Assessment] Nutritional Assessment [Included in Nursing Assessment] Vitals [Included in Nursing Assessment] TB Test [Flow Sheet – in development] Medication Review [Included in Nursing Assessment] Document any verbal orders [Client Orders] 	<ul style="list-style-type: none"> Shift Summary notes [Service Note] Add to treatment plan [Commercial Treatment Plan] Administers orders & documents follow-ups [MAR] Documents verbal orders [Client Orders] 	<ul style="list-style-type: none">
Prescriber/MD Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Admit Order [Client Orders] Admit Diagnosis [Diagnosis Document] Psychiatric Evaluation [Service Note] Initial Orders (meds, diet, labs, safety checks, etc.) [Client Orders] Co-signs verbal orders [Client Orders] History & Physical [History and Physical] Initiates interdisciplinary treatment plan [Commercial Treatment Plan] 	<ul style="list-style-type: none"> Psychiatric notes [Service Note] Add to treatment plan [Commercial Treatment Plan] Create orders (medication, labs, S&R, diet, safety checks, etc.) [Client Orders] Co-signs verbal orders [Client Orders] 	<ul style="list-style-type: none"> Discharge Order [Client Orders] Discharge Diagnosis [Diagnosis Document] Discharge/Transfer Summary [TBD] Aftercare orders [Client Orders]
Dietitian Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Follow up nutritional evaluations [Service Note] 	<ul style="list-style-type: none">
Social Worker/Clinician Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Social Services Assessment [Service Note] Needs and Strengths Assessment [Service Note] Crisis Assessment [in development] 	<ul style="list-style-type: none"> Progress notes [Service Note] Discharge planning [Service Note] Add to treatment plan [Commercial Treatment Plan] 	<ul style="list-style-type: none"> Coordinates placement [Service Note]
Other Direct Services Staff Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Progress notes [Service Note] 	<ul style="list-style-type: none">
Billing Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Inpatient Coding Document [Inpatient Coding Document]
Quality Assurance/Oversight Tasks	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Medication Reconciliation Review 	<ul style="list-style-type: none"> Utilization Review Incident Reporting & Debriefing Seclusion & Restraint Reporting & Debriefing 	<ul style="list-style-type: none"> Chart Review [Client Documents]

County:

Facility: CSU

	Pre-Admit	Admission/Intake	Services/Orders	Discharge
Administrative Tasks	<ul style="list-style-type: none"> Verifies client in EHR looking for potential duplicates using DOB, emails KM if duplicate found Gives client demographic to fill out Checks Megan's Law 	<ul style="list-style-type: none"> Launches and has client sign in EHR consent to treat, HIPAA, medi-care ABN (if needed) consent for tele psych If possible gets copies of insurance cards Adds new client if not in HER, Opens and launches diagnostic review If open to SLOBH clinic sends clinic/med manager an email Adds/updates demographic Does UMDAP with client if not done in last 12 months 	<ul style="list-style-type: none"> Checks treatment session to see if open and Opens treatment session if needed Opens client assignment maintenance 3100 for SMWG, 3104 for CSU, 650 for treatment plan for CSU and 2934 for current server/SAI for CSU Opens treatment session (new each visit) 	<ul style="list-style-type: none"> Sets up post CSU appointment and send out email to notify clinic staff Fills out individual client services maintenance from admit to close Closes treatment plan Make sure client is off of caseload Leaves treatment session open Scans records into EHR Enters client onto CSU excel log
Nursing Tasks	<ul style="list-style-type: none"> Looks up client in EHR to see history Gets report from MHET/ED/Clinic- where ever client is coming from 	<ul style="list-style-type: none"> Does medical assessment & vitals Does medication inventory with client & has them sign Does client inventory of belongings with client and has them sign Has client fill out wellness scale 	<ul style="list-style-type: none"> Launches CSU admit order set, enters orders into EHR providers orders and signs then tags provider with their EHR # Launches, fills out informed consent and has provider go over. Then has client sign in EHR. Obtains pre filled CSU order set MAR and fills out client info on it Obtains blank MAR and enters client medications onto it with times to be administered In the EHR does admission note (have template) In the EHR does progress note for shift (have template) If obtains Telephone or verbal orders from provider enters into EHR under physicians orders, signs and tags provider to sign 	<ul style="list-style-type: none"> In EHR does discharge note (have template) Has client fill out wellness scale Returns inventory of personal belongings and has client sign Returns medications to client and has them sign medication inventory acknowledging receiving them back If being transferred to another facility has receiving person sign medication inventory and belongings inventory and gives to the person transferring client If transferring to another facility calls report
Prescriber/MD Tasks	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Reviews informed consent with client 	<ul style="list-style-type: none"> Signs appropriate medication orders in EHR Does tele psych PRN and enters note into EHR Consults with staff as needed Consults with staff about 5150 rescind requests 	<ul style="list-style-type: none"> If ordered medication during stay and has continuation orders sends the medication order into local pharmacy of clients choice
Dietitian Tasks	<ul style="list-style-type: none"> Not applicable at the CSU 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">
Social Worker/Clinician Tasks	<ul style="list-style-type: none"> Looks up client in EHR Receives report 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Does mental health assessment with client if not already done Does shift note for client Works with client on recovery plan Connects client with needed resources After getting ROI works with current MH providers or family as needed If re-assessing a 5150 hold does 5150 form in EHR Admit diagnosis 	<ul style="list-style-type: none"> Ensures client has a copy of recovery plan Gives resources in folder to client Does discharge note in EHR If needed gives client a ride within SLO county Could possibly walk to DAS or SLOBH if a follow up is scheduled
Other Direct Services Staff Tasks	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">

	<ul style="list-style-type: none"> • • 	<ul style="list-style-type: none"> • • 	<ul style="list-style-type: none"> • • 	<ul style="list-style-type: none"> • •
Billing Tasks	<ul style="list-style-type: none"> • Done by SLOBH • • • • 	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •
Quality Assurance/ Oversight Tasks	<ul style="list-style-type: none"> • • • • 	<ul style="list-style-type: none"> • Daily MAR review and reconciliation done by medical coordinator • Medical coordinator ensure all forms that needed to be signed for clients at the CSU currently have been in EHR • • • 	<ul style="list-style-type: none"> • CSU manager checks daily to ensure IC have been done by staff • CSU manager checks to make sure admit note, nursing assessment, shift notes have been done by medical staff • CSU manager check to make sure MH note, assessment and discharge note are don't and appropriate LPHA is tagged oco-sign • • 	<ul style="list-style-type: none"> • CSU Manager audits MAR's and medical notes • AA audits chart per internal audit sheet to make sure staff did notes for their shifts, if not notifies them and Sandy • • • •