

FRONT DESK: BASIC FUNCTIONALITY



HEALTH
AGENCY

Introduction To The Client Dashboard

This widget shows a **summary of the client**. Like date of birth and home address.

Client Dashboard

Summary

Name	: Test, Patient	DOB	: 11/09/1988	Age	: 34 Year	Home Address	: 123 Main St Suite 208 Los Angeles, CA 90019
Home Phone	:	E-Mail	:	Primary Clinician	: Robert, Clinician	Primary Physician	: Psychiatrist, Staff
Emergency Contact:		Last Seen On	: 01/04/2023				
Current Balance	: \$0.00						

Client Tracking

Agency Registration: 25%

Task	Status	Date
Client Information	Complete	06/28/2022
Verify Coverage	In Progress	09/21/2022
Client Information	In Progress	09/23/2022
Update Problem List	In Progress	10/05/2022

Medications

Name	Instruction	Start	End
Divalproex	125mg, TID, Oral 30 each Morning	11/22/2022	01/26/2023
Lamictal	100mg, Tab, Oral 1 each Morning	11/22/2022	01/26/2023
Xanax	0.5mg, Tab, Oral 30 each As Needed	11/22/2022	12/21/2022
Anafranil	50mg, cap, Oral 1 each Morning	11/29/2022	01/27/2023

Allergies

Allergies	Type
Aspirin	Allergy
milk	Allergy
Milnacipran	Failed Trials
NSAIDS (Non Steroidal Anti-Inflammatory Drug)	Allergy

Treatment Team

Role	Name
Primary Clinician*	Clinician, Robert
Therapist	Clinician, Robert
Program Assignment Staff: SUD Outpatient*	Clinician, SUD
Case Manager	Rowe, Charla
Psychiatrist	Staff, Psychiatrist
Primary Physician*	Staff, Psychiatrist
Business Office	Stephan, Khristy

Documents To Do(3)

Narrative	Date	Status
Progress Note	2022-12-14	In Progress
Progress Note	2023-01-04	In Progress
CalAIM Assessment	2022-12-29	Co-Sign

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Introduction To The Client Dashboard

Treatment Team is located on the right hand side.

The screenshot shows the SmartCare Client Dashboard for a patient named "Test, Patient (1032)". The dashboard is divided into several sections:

- Summary:** Displays patient information including Name, DOB (11/09/1988), Age (34 Year), Home Address (123 Main St Suite 208 Los Angeles, CA 90019), Home Phone, Emergency Contact, Current Balance (\$6.00), Primary Clinician (Robert, Clinician), and Primary Physician (Psychiatrist, Staff). Last Seen On is 01/04/2023.
- Client Tracking:** Shows a progress bar for Agency Registration at 25%. Below is a table of tasks:

Task	Status	Date
Client Information	Complete	06/28/2022
Verify Coverage	In Progress	09/21/2022
Client Information	In Progress	09/23/2022
Update Problem List	In Progress	10/05/2022

- Medications:** A table listing medications with columns for Name, Instruction, Start, and End.

Name	Instruction	Start	End
Divalproex	125mg, TID, Oral 30 each Morning	11/22/2022	01/26/2023
Lamictal	100mg, Tab, Oral 1 each Morning	11/22/2022	01/26/2023
Xanax	0.5mg, Tab, Oral 30 each As Needed	11/22/2022	12/21/2022
Anafranil	50mg, cap, Oral 1 each Morning	11/29/2022	01/27/2023

- Allergies:** A table listing allergies with columns for Allergies and Type.

Allergies	Type
Aspirin	Allergy
milk	Allergy
Misbacpran	Failed Trials
NSAIDS (Non-Steroidal Anti-Inflammatory Drug)	Allergy

- Treatment Team:** A table listing the treatment team members, highlighted with a red box.

Role	Name
Primary Clinician*	Clinician, Robert
Therapist	Clinician, Robert
Program Assignment Staff: SUD Outpatient*	Clinician, SUD
Case Manager	Rowe, Charla
Psychiatrist	Staff, Psychiatrist
Primary Physician*	Staff, Psychiatrist
Business Office	Stephan, Kristy

- Documents To Do(3):** A table listing documents to be completed.

Document	Date	Status
Narrative	2022-12-14	In Progress
Progress Note	2023-01-04	In Progress
CalAIM Assessment	2022-12-29	Co-Sign

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Introduction To The Client Dashboard

This **client tracking** widget which is in the middle, goes over **elements and tasks that still need to be done for the client**. And can **show you a range of different groupings of these to do's**. In this case, I have some **client information to collect and verification of benefits to do** and overall I'm **25% done with that data collection**.

The screenshot shows the SmartCare Client Dashboard for a patient named 'Test, Patient (1032)'. The dashboard is divided into several sections:

- Summary:** Displays patient information including Name, DOB (11/09/1988), Age (34 Year), Home Address (123 Main St Suite 208 Los Angeles, CA 90019), E-Mail, Emergency Contact, Current Balance (\$0.00), Primary Clinician (Robert, Clinician), and Last Seen On (01/04/2023).
- Client Tracking:** A table showing tasks and their status. A progress bar for 'Agency Registration' is highlighted in green, showing 25% completion. The table lists tasks like 'Client Information', 'Verify Coverage', and 'Update Problem List' with their respective statuses and dates.
- Treatment Team:** A list of staff members and their roles, including Primary Clinician, Therapist, Program Assignment Staff, Case Manager, Psychiatrist, and Business Office.
- Documents To Do(3):** A list of pending documents such as Narrative, Progress Note, and CalAIM Assessment, with their dates and current status (e.g., In Progress, Co-Sign).
- Medications:** A table listing various medications like Divalproex, Lamictal, Xanax, and Anafranil with their instructions and dates.
- Allergies:** A table listing allergies such as Aspirin, milk, Milnacipran, and NSAIDs.

A video player interface is visible at the bottom of the screenshot, showing a play button and a timestamp of 01:48.

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Introduction To The Client Dashboard

I can also see **medications and allergies** the client has.

The screenshot displays the SmartCare Client Dashboard for a patient named 'Test, Patient (1032)'. The dashboard is divided into several sections:

- Summary:** Displays patient details such as Name, DOB (11/09/1988), Age (34 Year), Home Address (123 Main St Suite 208 Los Angeles, CA 90019), E-Mail, Primary Clinician (Robert, Clinician), Primary Physician (Psychiatrist, Staff), Emergency Contact, and Current Balance (\$0.00). It also shows the Last Seen On date (01/04/2023).
- Client Tracking:** Shows a progress bar for Agency Registration at 25% and a table of tasks with their status and dates.
- Treatment Team:** Lists various roles and the names of the staff members assigned to them.
- Documents To Do(3):** Lists pending tasks like Narrative, Progress Note, and CalAIM Assessment with their due dates and current status.
- Medications:** A table listing the patient's current medications, including their name, instruction, start and end dates.
- Allergies:** A table listing the patient's allergies, including Aspirin, milk, Misoprostol, and NSAIDs.

The Medications and Allergies sections are highlighted with a red box in the screenshot.

Name	Instruction	Start	End
Divalproex	125mg, TID, Oral 30 each Morning	11/22/2022	01/26/2023
Lamictal	100mg, Tab, Oral 1 each Morning	11/22/2022	01/26/2023
Kanax	0.5mg, Tab, Oral 30 each As Needed	11/22/2022	12/21/2022
Anafranil	50mg, cap, Oral 1 each Morning	11/24/2022	01/27/2023

Allergies	Type
Aspirin	Allergy
milk	Allergy
Misoprostol	Failed Trials
NSAIDs (Non-Steroidal Anti-Inflammatory Drug)	Allergy

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Introduction To The Client Dashboard

I can also see any **documents that need to be done for the client.** And so then if I were to **click into any of these it will take me to that document.** And in this case the client needs to cosign their assessment.

Client Dashboard

Summary

Name	: Test, Patient	DOB	: 11/09/1988	Age	: 34 Year	Home Address	: 123 Main St Suite 208 Los Angeles, CA 90019
Home Phone	:	E-Mail	:	Primary Clinician	: Robert, Clinician	Primary Physician	: Psychiatrist, Staff
Emergency Contact	:	Current Balance	: \$0.00	Last Seen On	: 01/04/2023		

Client Tracking

Agency Registration: 25%

Task	Status	Date
Client Information	Complete	08/28/2022
Verify Coverage	In Progress	09/21/2022
Client Information	In Progress	09/23/2022
Update Problem List	In Progress	10/05/2022

Medications

Name	Instruction	Start	End
Divalproex	125mg, TMEC, Oral 30 each Morning	11/22/2022	01/26/2023
Lamictal	100mg, Tab, Oral 1 each Morning	11/22/2022	01/26/2023
Xanax	0.5mg, Tab, Oral 30 each As Needed	11/22/2022	12/23/2022
Anafanil	50mg, cap, Oral 1 each Morning	11/29/2022	01/27/2023

Allergies

Allergies	Type
Aspirin	Allergy
milk	Allergy
Milnacipran	Failed Trials
NSAIDS (Non-Steroidal Anti-Inflammatory Drug)	Allergy

Treatment Team

Role	Name
Primary Clinician*	Clinician, Robert
Therapist	Clinician, Robert
Program Assignment Staff: SUD Outpatient*	Clinician, SUD
Case Manager	Rowe, Charla
Psychiatrist	Staff, Psychiatrist
Primary Physician*	Staff, Psychiatrist
Business Office	Stephan, Khrystal

Documents To Do(3)

Document	Date	Status
Narrative	2022-12-14	In Progress
Progress Note	2023-01-04	In Progress
CalAIM Assessment	2022-12-29	Co-Sign

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Introduction To The Client Dashboard

So if I have the client in front of me, and I click that link that's going to open up that CalAIM Assessment for test patient. Where I can then go through these steps to allow them to cosign it.

CalAIM Assessment

Effective: 12/29/2022 Status: Signed Author: Clinician, Robert 12/19/2022

Document

Client ID: 1032 Page 1 of 2

CalMHSA SmartcareTrain | 09-21-2022
CalAIM Assessment

Client Name: Test, Patient DOB: 11/09/1988
Client ID: 1032 Effective Date: 12/29/2022

Domain 1: List/Describe Presenting Problem(s), Current Mental Status, History of Presenting Problem(s) and Client-Identified Impairment(s)

This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.

Domain 2: List/Describe Trauma - Indicate N/A if not applicable.

This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.
This is a good note, This is a good note, This is a good note. This is a good note, This is a good note, This is a good note.

Domain 3: List/Describe Behavioral Health History and Comorbidity

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Introduction To The Client Dashboard

It will take you back to the **client base dashboard**. Most of these **widgets** are **informational**. However, the documents widget actually is interactive where I can then go into any document that's an outstanding for this client that I searched for.

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Xanax	0.5mg, Tab, Oral 30 each As Needed	11/22/2022	12/21/2022
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Allergies	Type
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milk	Allergy
Misnacpran	Failed Trials
NSAIDS (Non-Steroidal Anti-Inflammatory Drug)	Allergy

- Treatment Team:** A table listing team members with columns for Role and Name.

Role	Name
Primary Clinician*	Clinician, Robert
Therapist	Clinician, Robert
Program Assignment Staff: SUD Outpatient*	Clinician, SUD
Case Manager	Rowe, Charla
Psychiatrist	Staff, Psychiatrist
Primary Physician*	Staff, Psychiatrist
Business Office	Stephan, Khristy

- Documents To Do(3):** A table listing documents with columns for Document Name, Date, and Status.

Document Name	Date	Status
Narrative	2022-12-14	In Progress
Progress Note	2023-01-04	In Progress
CalAIM Assessment	2022-12-29	Co-Sign