

# MAT Prescriber – SmartCare Training Tips and Resources

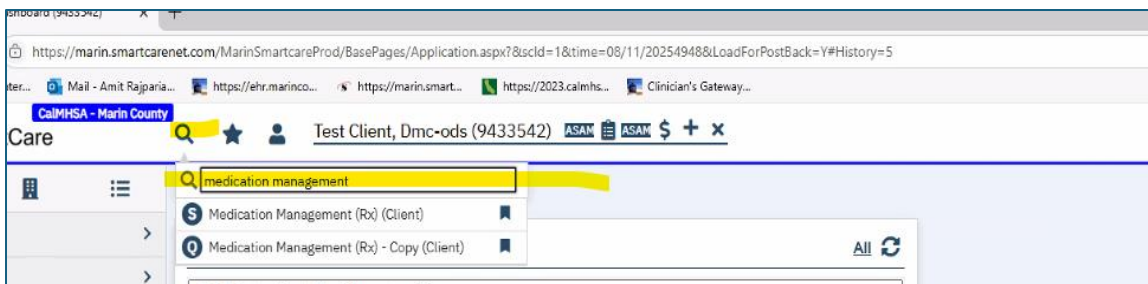
## Key SmartCare Resources for Prescribers

- CalMHSA Website – **Prescriber Documentation**

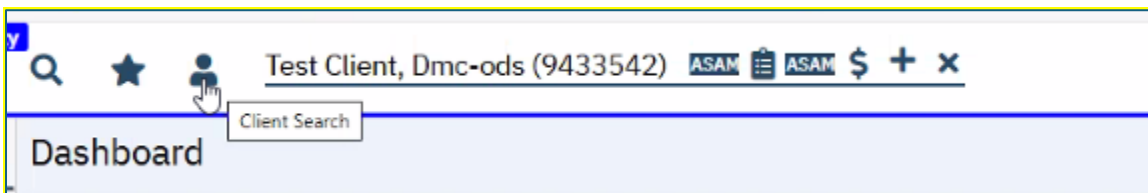
- Videos and Guides: *Comprehensive Guide Webpage*
- PDFs on EHR Essentials, Med Management, Note Templates, etc.: *Quick Guides Webpage*
- Live Chat Function: *Recommend indicating at the beginning that you are a prescriber so channeled to the appropriate pathway (reminder: do not enter PHI)*

## **Two Applications within SmartCare for Prescribers**

1. Prescribing Application [Search via Magnifying Glass: *Medication Management Rx (Client)*]



2. Clinical Documentation [Seach via Person Logo: *Client Search*]



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## Common Functions within Medication Management Rx (Client) – Ordering Medications

- How to Place a **New Medication Order**
  - Printed Instructions: <https://2023.calmhsa.org/medication-order-screen/>
  - Video Instructions: <https://vimeo.com/792363431/a5ef6a70f3?fl=pl&fe=ti>
  - Other Tips:
    - Click “Send Directly to Pharmacy” - unless you are printing a prescription
    - It will auto populate if you have already ordered for this client. If not, you can enter the Pharmacy and search. Select the correct pharmacy.
    - Start to type the medication name and hit tab and the applicable choices will come up.
    - Complete other applicable fields (e.g. strength, unit, frequency, days, refills). Can also include instruction text.
    - If you want to send a message ONLY to the pharmacists – populate it in the “Comment” field and click “Include on Prescription” (this is not intuitive and not actually included on the prescription)
    - Once fields completed, then click “Insert” and if looks correct, click “Prescribe” and then click “Prescribe” again.
    - If prescribing a controlled substance, there will be a message where the prescriber clicks again and then has to go to the HID Approve App on their phone. You need to swipe, enter the password, and then approve.

The screenshot displays the 'New Medication Order' form in the Streamline Medication Management system. The form is populated with the following information:

- Pharmacy:** [Search field]
- Prescriber:** Rapata, Amit Licensed Psychiatrist, DEA # BR7025263, Order Date: 08/11/2025, Prescribing Location: Office - Box A/R
- Medication:** [Search field]
- Strength:** [Dropdown menu]
- Dose:** [Dropdown menu]
- Unit:** [Dropdown menu]
- Frequency:** [Dropdown menu]
- Rx Start:** 08/11/2025
- Days:** 30
- Dispense Qty:** 30
- Policy Unit:** Tablet
- Refills:** 1
- Sample:** 1
- Stock:** 1
- Rx End:** 09/09/2025

The table below shows the medication entry:

Strength	Dose	Unit	Frequency	Rx Start	Days	Dispense Qty	Policy Unit	Refills	Sample	Stock	Rx End
X Sling-Tab Oral	1	each	One-3 Day	08/11/2025	30	30	Tablet	1	1	1	09/09/2025

- How to **Order Refills**
  - Printed Instructions: <https://2023.calmhsa.org/re-ordering-a-medication/>
  - Other Tips:
    - If this is for a controlled substance, you may need to make a new order.
    - If able to order a refill, to check if it goes through, click on the medication name and at the bottom (under Delivery Method), it will show and then you can also review the status here.
    - Yellow Rx boxes = Medications the prescriber has directly prescribed (if not yellow, indicates a medication being taken, but not directly prescribed)

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## Common Functions within Clinical Documentation Sections in SmartCare

- To Perform **Chart Reviews**:
  - Search the client [Search via the Person logo]
  - Can look at scheduled visits by going to “Services”
  - Can review notes and other documentation by going to “Documents” [Reminder: Check the filters in case you would like to review a shorter/longer period]
  - Can review a summary of recent notes by going to “Client Abbreviated Note Review”
  - Tip: Consider opening SmartCare notes in two (2) different browsers to allow for concurrent chart review and documentation
- To Enter **Service Notes**:
  - If using scheduling features, review “Appointments for Today” and click on the time and you will be able to enter a note
  - If not using the scheduling features, search “New Service Note” and it will bring up a “Service” screen to enter your note
    - Enter Program Name (that will also help limit to applicable procedure list)
    - Choose Procedure (e.g. Medication Training and Support) – Reminder: Assessment and E&M Codes are lockouts in Residential treatment
    - Choose location, start time and service time

Psych/Medical Note

Effective 08/11/2025 Status New Author Rajparia, Amit 08/08/2025

Service Note Billing Diagnosis Add-On Codes Warnings Disposition

**Service**

Status Show Start Date 08/11/2025

Program Center Point Intensive Outpatient 2.1 Start Time 1:30 PM

Procedure Medication Training and Support Modifier... Travel Time Minutes

Location Non-residential Sub Abuse

Clinician Rajparia, Amit Documentation Time Please fill in this field Minutes

Mode Of Delivery Service Time \* 30 Minutes

Cancel Reason Attending

Evidence Based Practices Referring

Transportation Service No  Interpreter Services Needed

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- Once the required fields are completed, click the “note” tab and complete
  - Tip: The first time you complete a note for the client, you need to complete the fields, but some will be pre-populated on subsequent visits.
  - Tip: May use “billing diagnosis” tab to enter a single use diagnosis, but the preferred method is to use the **Diagnosis Document** feature (rather than billing diagnosis field in the note), which will populate for the client moving forward. Additional information on the Diagnosis Document below.
  - Tip: You can save note at any point and return to it from your dashboard to complete. The note has to be signed to be finalized.
  - If you want to add vital signs select search icon and begin typing “Enter Vitals”, fill out New Entry Flow Sheet, hit save, then hit close; this will take you back to the service note which will now have the vital signs populated
- Once done with note, select sign and will provide a PDF version of the completed note which will be visible under client documents

Effective 08/11/2025 Status New Author Rajparia, Amit 08/08/2025

Service **Note** Billing Diagnosis Add-On Codes Warnings Disposition

Refresh Data Show PDF Sections Hide PDF Sections  Select ALL "Do not include in PDF" / "Delete from the Note"

Subjective/CC/HPI/Visit Notes  Delete from the Note

Client History & Pertinent Information  Delete from the Note

Recent Labs/Tests  Do not include in PDF

Labs	Collected Date	Flag	Value	Range	Comments	Reviewed
------	----------------	------	-------	-------	----------	----------

Allergies/Intolerances/Failed Trials  SmartCare NKDA  Do not include in PDF

Type/Drug	Severity	Reaction	Comments
Allergies			
Intolerances			
Failed Trials			

- To enter a **Diagnosis Document** (Link to [CalMHSA Step-by-Step Guide](#))
  - Search “Diagnosis Document (Client)”
  - Tip: Ensure the Effective Date of the document reflects the first visit date with that client, if applicable [The effective date defaults to today’s date]
  - Indicate if it is primary or not (have to have at least one primary diagnosis). Insert more if applicable, and then it will ask for an order among the diagnoses.
  - Sign