

Summary of Modifications to SMART in Version 12.11.2 (June-August 2011 Release)
Release Date September 23, 2011

This table summarizes the major changes for users in SMART Version 12.11.2.

Several modules change in the new version to provide greater functionality to the user, as summarized below.

| Module Affected | Description |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Encounters and Miscellaneous Notes | Signed and Unsigned Notes having large amounts of text now display properly in the print report. |
| Consents | A new field, "Date Client Signed Consent" has been added. The field previously labeled "Consent Date" has been relabeled "Earliest Date of Services to be Consented." Please see detailed write-up with screenshots at the end of this document for additional information. |
| Alerts – Treatment Plan Review | Creates an alert that will appear to treatment review members who have not yet signed off on the treatment plan review. |
| Alerts – Client Group Enrollment Expiring | Creates a client group enrollment expiring alert. |
| Non-episode Contacts | The "Add New Non-Episode Contact" link is now available when the user is within the context of a client's closed case. |
| Recovery Plan | The user now receives a message to create an overview on the recovery plan prior to being able to add a check-up. |
| Group Notes | Users can now sort the group session notes list without getting a SMART yellow page. A Group Notes search feature has been implemented so that users can search by Group Type, Lead Staff, and Active Status of the group. |
| Agency List | For user accounts with access to multiple agencies, inactive agencies are now displayed at the end of the agency list when logging in. |
| Group Profile (Group Notes) | Group Start Date is now editable after the Group Profile is created. |
| Maryland Data Exchange | Maryland Data Exchange now works with new Client Activity fields. |
| Change Password/PIN | All fields are shaded dark yellow (SMART required) when changing password and PIN. |
| ATR Authorizations | A Requests Link now appears on the Authorization screen for ATR 3 clients. |
| Treatment Review | The status of a treatment plan review on the Activity List now always matches its status on the treatment plan review list. |
| TAP Assessment | The status of the TAP assessment in the Client Activity List now shows as "completed" when the primary diagnosis field has been filled out. |
| Discharge | Text fields having large amounts of text now display properly in the print report. |

Some changes affect only users at the MD Department of Juvenile Services, as summarized below.

| Module Affected | Description |
|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DJS Treatment Service Plan | On the Goal profile of the TSP, the value for Protective Factor has been modified when the Domain = Attitudes and Aggression and Need = Aggression. This same value has been filtered out when the Need is not Aggression. |
| DJS Professional Services Modules: Education, Somatic Health, mental Health, Substance Abuse | Text fields in the Medical Screens, Mental health and Substance Abuse areas of the DJS TSP now accept special characters upon save. |
| DJS Treatment Service Plan | Several updates have been made to the DJS TSP, including using the new School lookup tables, and changes to screen business rules. |
| DJS Needs Assessment | User should not be allowed to select 2 radio buttons at the same time: fix bug allowing user to select 2 radio buttons at the same time. |
| DJS Needs Assessment | DJS Needs Assessment, scoring should work properly and blank fields on the screen should not overwrite the database fields as Null. |
| DJS Needs Assessment & Reassessments | DJS Needs Assessment and Reassessments should properly save the Adjudicated Delinquent Offense as entered. This fixes a bug that caused the Adjudicated Delinquent Offense not to save. |
| DJS Needs Assessment | DJS Needs Assessment Delinquent History is now calculating as expected, fixing a bug that failed to run and calculate the scoring. |
| DJS Contacts Module | New DJS Contacts module, including a Search, List and Profile Screen has been developed. |
| DJS Supervision Module | The DJS Supervision Episode dates validations have been modified so that if the Start Date of a new supervision episode is prior to the end date of the previous supervision episode, the user may not associate a TSP or create a supervision level history record. |
| DJS TSP | Modified validations for the DJS TSP, where if the Supervision Level History record is not complete, the "Create TSP" link is not active and a TSP cannot be created. |
| DJS Mental Health | Diagnosis Summary field on the Mental Health module, is now limited to 256 characters. |
| DJS Somatic Health, Medical Profile | Medical profile now allows a space. WI#9686. |
| DJS TSP Placement & Permanency screen | On the DJS TSP Placement & Permanency screen, the Date IV-B Review may now be a future date. |
| DJS Supervision Level History | DJS TSP has been modified to include VPI Level I, VPI Level II, and VPI Level III as Supervision Levels if the court ordered level of supervision is Probation. |

Changes in how consent dates are propagated in SMART with September 2011 Release by Janet Bridgers

The consent has changed in the September 2011 release. To summarize, a new field was added, "Date client signed consent." The contents of the old field previously labeled "Consent date" have been moved to "Earliest date of services to be consented" and this new label has been added to that field.

"Date client signed consent" is grayed out until you say that "Yes" the client signed the paper agreement form. When you say "yes," then "Date client signed consent" becomes dark yellow and pre-fills with the current date, which may be modified by the user.

Example 1: Consent issued in pre-September 2011 version of SMART as it appears in September 2011 release

SMART uses the consent date from pre-September 2011 release and places that into "Earliest date of services to be consented." Date client signed consent is left blank.

The screenshot shows the SMART Client Disclosure Agreement form. The user is Janet Bridgers, working at First Bridge Treatment (Training Agency), Annapolis. The client is Flintstone, Wilma, with ID F0101408765FL. The form is titled "Client Disclosure Agreement" and includes a note: "Consented information may not be redisclosed." The client name is Flintstone, Wilma, and the client ID is F0101408765FL. The disclosed from agency is First Bridge Treatment (Training Agency). The system agency is Yes, and the disclosed to agency is Janets DJS (Training). The disclosed to entity (Non System Agency) is blank, and the purpose for disclosure is also blank. The earliest date of services to be consented is 1/1/2010. The field "Has the client signed the paper agreement form" is set to Yes, and the "Date client signed consent" field is blank. The form includes sections for Client Information Options, Consent Expires Upon (with options for Discharge, Date Signed, Other Event, and Civil Just Cond), and Disclosure Selection (with options for Admission, Client Information, Discharge, Drug Test Results, ECourt Case Management, Encounter Detail, and Intake Transaction). There are also fields for Comments and Other Disclosures, and buttons for Finish and Revoke.

Example 2: New consent originally issued in September 2011 version of SMART

There is a new field, labeled "Date client signed consent." This field is disabled until the user chooses "Yes" to "Has the client signed the paper agreement form." The field which governs the start date for sharing of information is the "Earliest date of services to be consented" field.

SMART QA IGSR User: Bridgers, Janet
 Loc: First Bridge Treatment (Training Agency), Annapolis
 Client: Wang, Hua | F0101665199WA | Case #: 2

Client Disclosure Agreement Create Referral Using this Disclosure Agreement

Note: Consented information may not be redisclosed.
 Client Name: Wang, Hua
 Client ID: F0101665199WA
 Disclosed From Agency: First Bridge Treatment (Training Agency)

Entities with Disclosure Agreements: [Empty]
 System Agency: [Empty]
 Disclosed To Agency: Janets DJS (Training)
 Disclosed To Entity (Non System Agency): [Empty]
 Purpose for disclosure: test

Earliest date of services to be consented 5/1/2011
 Has the client signed the paper agreement form: Yes Date client signed consent 8/24/2011

Client Information Options: Behavioral Health Assessment, Client Screening, Client SSI-SAI Screening, Consent, Contact Notes Detail, Continuing Care Check Up, Court Monitoring 8-505 Evaluation, Court Monitoring 8-507 Treatment, Court Monitoring Current Criminal, Court Monitoring Requirements fo
 Consent Expires Upon: Discharge(UD) +Days, Date Signed(DS) +Days, Other Event(OE) Exp, Crim Just Cond (CJC) Exp
 Disclosure Selection: Admission (UD, +60), Client Information (Profile) (UD, +60), Discharge (UD, +60), Drug Test Results (UD, +60), ECourt Case Management (UD, +60), Encounter Detail (UD, +60), Intake Transaction (UD, +60)

Comments: [Empty] Other Disclosures: [Empty]

Buttons: Finish, Revoke

Example 3: Expiration of consents by date

Disclosure selections that are set to expire upon date signed are now shown with a date of 1/1/0002 until the disclosure agreement has been signed and saved. When the consent is signed and saved, it becomes grayed out and the correct expiration date is printed next to each disclosure selection.

Before signing and saving:

SMART QA IGSR User: Bridgers, Janet
 Loc: First Bridge Treatment (Training Agency), Annapolis
 Client: Wang, Hua | F0101665199WA | Case #: 2

Client Disclosure Agreement

Note: Consented information may not be redisclosed.
 Client Name: Wang, Hua
 Client ID: F0101665199WA
 Disclosed From Agency: First Bridge Treatment (Training Agency)

Entities with Disclosure Agreements: Woofin Poof
 System Agency: Yes
 Disclosed To Agency: Woofin Poof
 Disclosed To Entity (Non System Agency): [Empty]
 Purpose for disclosure: test

Earliest date of services to be consented 2/1/2011
 Has the client signed the paper agreement form: Yes Date client signed consent 9/14/2011

Client Information Options: Admission, Behavioral Health Assessment, Client Screening, Client SSI-SAI Screening, Consent, Contact Notes Detail, Continuing Care Check Up, Court Monitoring 8-505 Evaluation, Court Monitoring 8-507 Treatment, Court Monitoring Current Criminal, Court Monitoring Requirements fo
 Consent Expires Upon: Discharge(UD) +Days, Date Signed(DS) +Days, Other Event(OE) Exp, Crim Just Cond (CJC) Exp
 Disclosure Selection: Client Information (Profile) (DS, 1/1/0002), DENS ASI Assessment (DS, 1/1/0002), DENS ASI Lite (DS, 1/1/0002), Drug Test Results (DS, 1/1/0002), ECourt Admission (DS, 1/1/0002), ECourt Alcohol Drug Assessment (DS, 1/1/0002), ECourt Cage Assessment (DS, 1/1/0002), ECourt Case Management (DS, 1/1/0002), ECourt Charge Received (DS, 1/1/0002), ECourt Criminal Justice (DS, 1/1/0002), ECourt Education History (DS, 1/1/0002)

Comments: [Empty] Other Disclosures: [Empty]

Buttons: Cancel, Save, Finish

After signing and saving:

SMART QA IGSR User: Bridgers, Janet
Loc: First Bridge Treatment (Training Agency), Annapolis
Client: Wang, Hua | F0101665199WA | Case #: 2

Diagnosics Print Report Print View

Client Disclosure Agreement [Create Referral Usin](#)

Note: Consented information may not be redisclosed.

Client Name: Wang, Hua
Client ID: F0101665199WA
Disclosed From Agency: First Bridge Treatment (Training Agency)

Entities with Disclosure Agreements: Woofin Poof
System Agency: Yes
Disclosed To Agency: Woofin Poof
Disclosed To Entity (Non System Agency):
Purpose for disclosure: test

Earliest date of services to be consented: 2/1/2011
Has the client signed the paper agreement form: Yes Date client signed consent: 9/14/2011

Client Information Options

- Admission
- Behavioral Health Assessment
- Client Screening
- Client SSI-SAI Screening
- Consent
- Contact Notes Detail
- Continuing Care Check Up
- Court Monitoring 8-505 Evaluation
- Court Monitoring 8-507 Treatment
- Court Monitoring Current Criminal
- Court Monitoring Requirements fo

Consent Expires Upon

- Discharge(UD) +Days
- Date Signed(DS) +Days
- Other Event(OE) Exp
- Crim Just Cond (CJC) Exp

Disclosure Selection

- Client Information (Profile) (DS, 9/13/2012)
- DENS ASI Assessment (DS, 9/13/2012)
- DENS ASI Lite (DS, 9/13/2012)
- Drug Test Results (DS, 9/13/2012)
- ECourt Admission (DS, 9/13/2012)
- ECourt Alcohol Drug Assessment (DS, 9/13/2012)
- ECourt Cage Assessment (DS, 9/13/2012)
- ECourt Case Management (DS, 9/13/2012)
- ECourt Charge Received (DS, 9/13/2012)
- ECourt Criminal Justice (DS, 9/13/2012)
- ECourt Education History (DS, 9/13/2012)

Comments: Other Disclosures:

Finish Revoke