UNIVERSITY OF MARYLAND
INSTITUTE FOR GOVERNMENTAL SERVICE & RESEARCH

SMART Tip Sheets
Intake

Office of Problem Solving Courts
ADMINISTRATIVE OFFICE OF THE COURTS

Intake

- New Episode
- Close Case

This set of tip sheets focuses on how to use the Intake screen to start a new client episode/case and to close a client case in SMART.

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MARYLAND DEPARTMENT OF HEALTH AND MENTAL HYGIENE

New Episode

The Episode officially opens the client/participant's case in SMART.

1. <u>Entry Steps</u>: Login, Select Facility (if applicable), from the Home screen, click **Client List**, select client, Episode List.

2. <u>Intake</u>: An intake is the beginning of a new episode of care at a facility and is required before any other clinical activities can be documented.

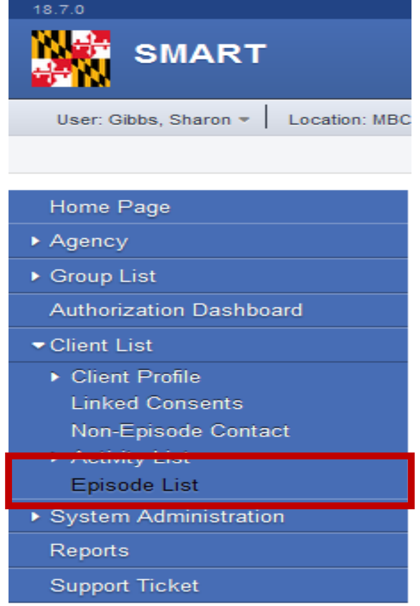
3. An Intake can only be completed if the client does not have any existing, active Intake record at the same facility or once all previous cases at the same facility have been closed. If you click **Activity List** prior to starting a new episode, SMART will redirect you to the Episode List screen.

4. Click **<u>Start New Episode</u>** to open a client case. This will open the Client Intake screen.

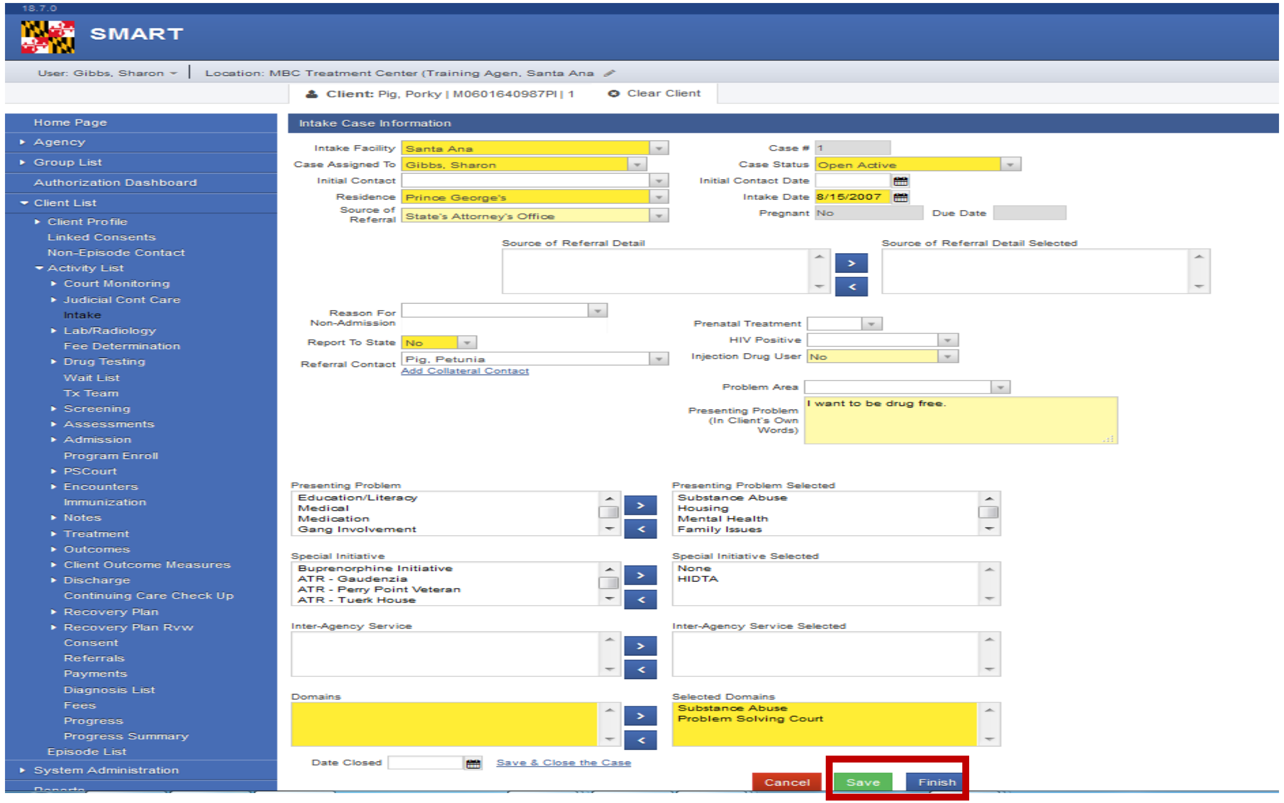
5. Complete all required fields.

6. Click **Save**.

7. Click **Finish**.



Once on the Episode List screen, click Start New Episode.



Changing the Client Case Status

The Intake screen can also be used to change the status of a client during the program. The case status can temporarily be changed when the client/participant is not in the community because he or she is in residential treatment, on bench warrant, etc., and will return to your program.

1. From the client Activity List, select Intake Transaction. This will open the Intake screen.

2. Go to the Case Status field.

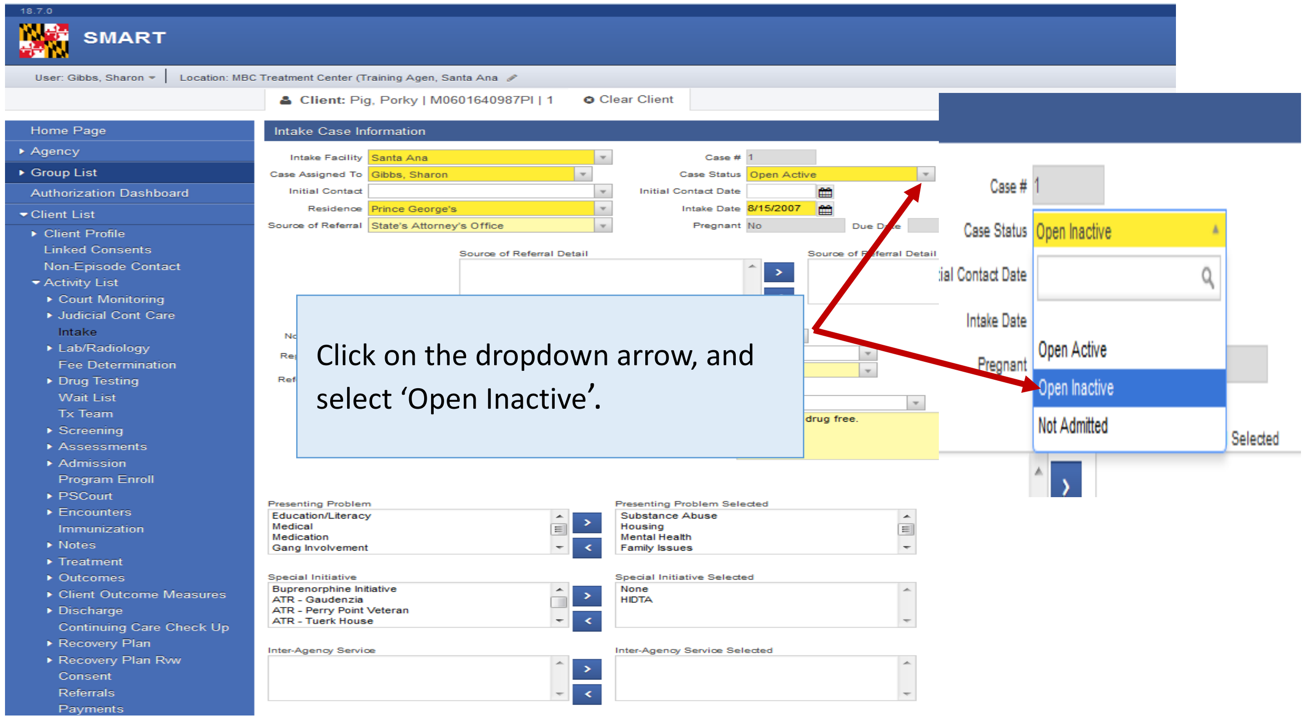
3. Select the dropdown menu. This will reveal three options- ‘Open Active’, ‘Open Inactive’, and ‘Not Admitted’.

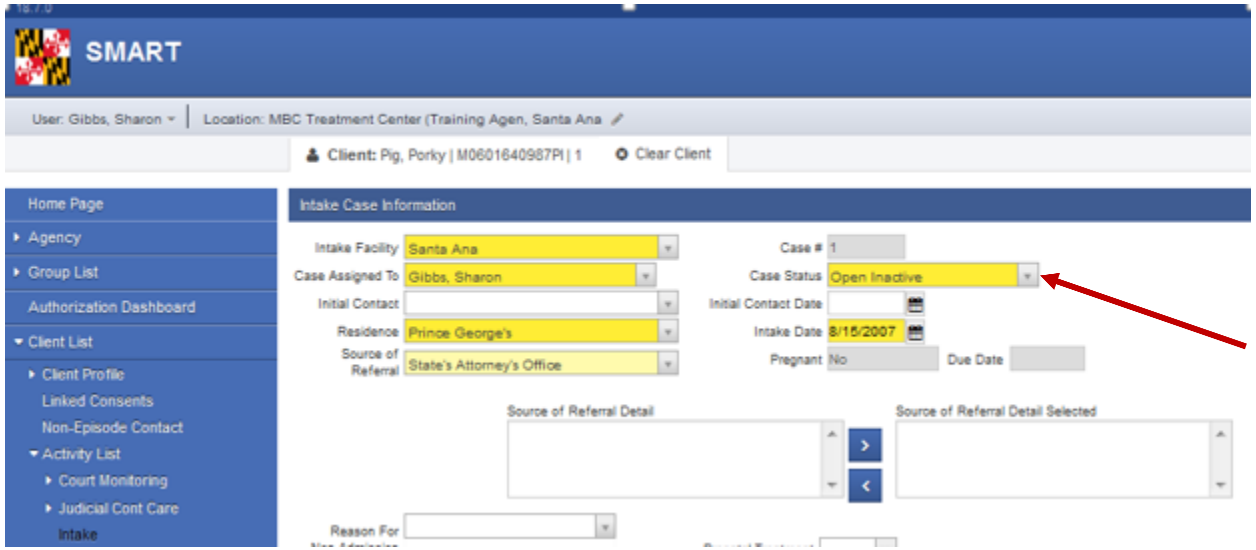
4. Select ‘Open Inactive’ if the participant is not in the community to receive Problem Solving Court case management services.

5. Locate the navigation buttons at the bottom of the screen.

6. Click **Save**.

7. Click **Finish**.

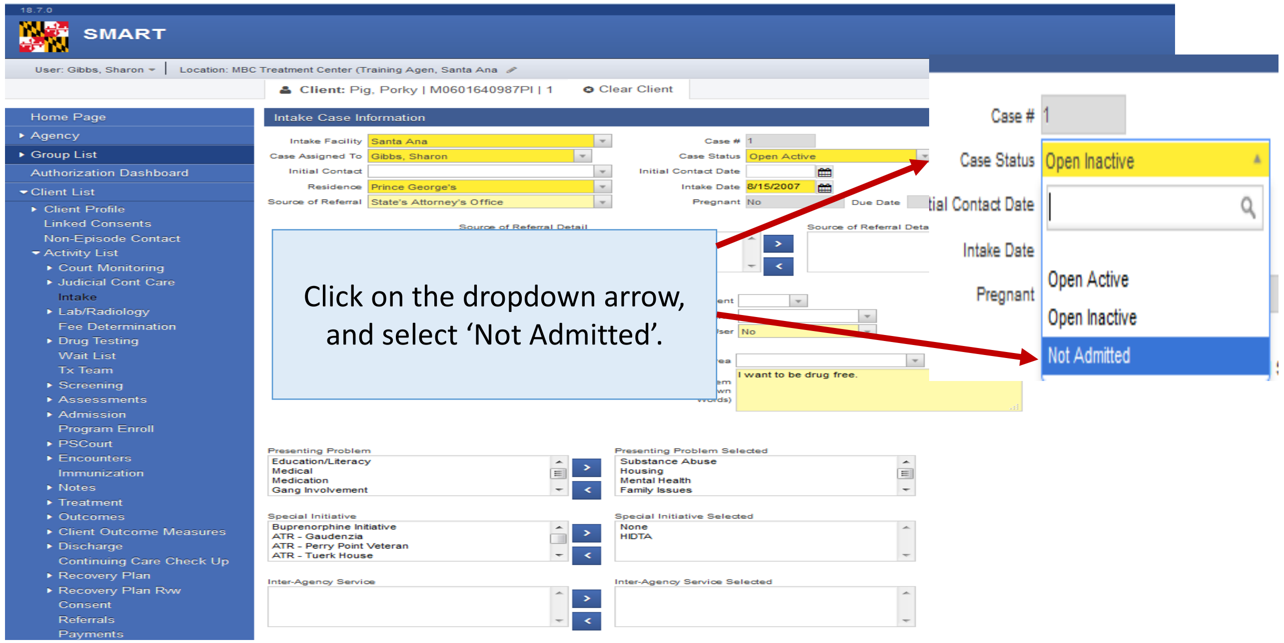


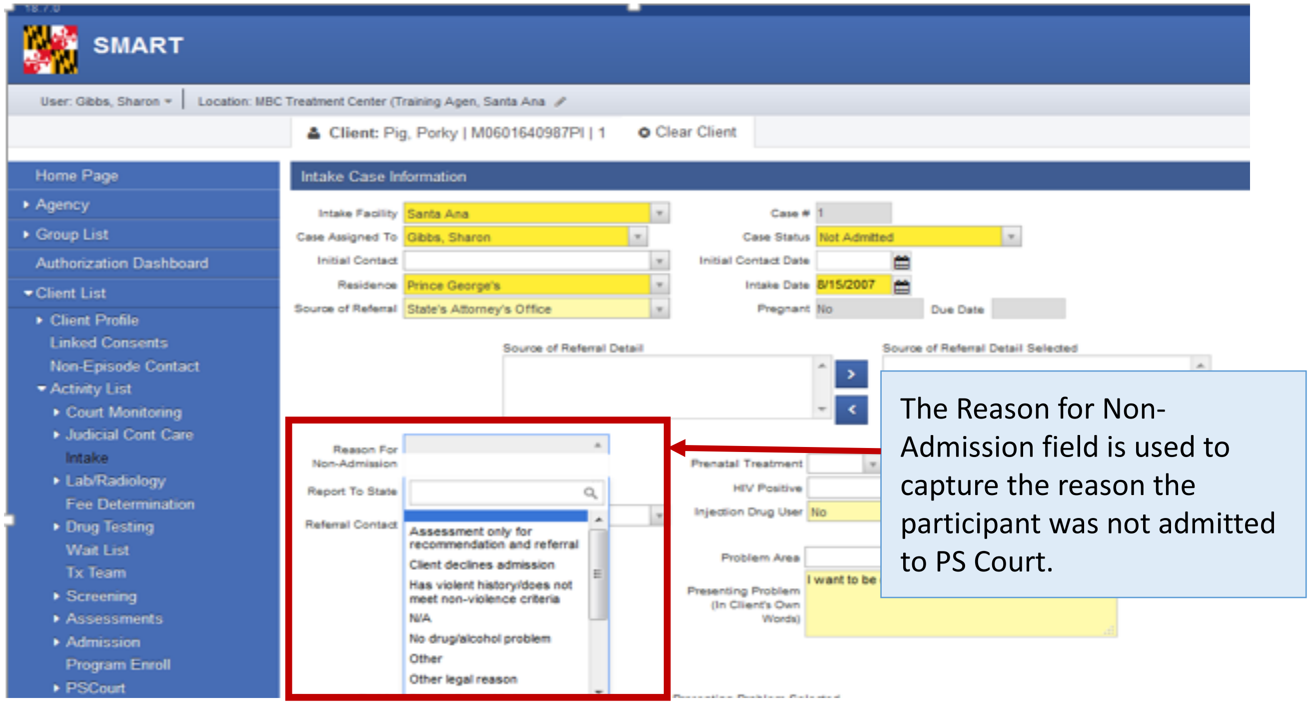


Closing A Client Case/Record That Was Not Admitted (There is not any Admission Record)

The Intake screen can also be used to track those clients who are screened but not admitted to your agency/court program.

1. From the client Activity List, click Intake Transaction. This will open the Intake screen.
2. Go to the Case Status field.
3. Click on the dropdown arrow. This will reveal three options- ‘Open Active’, ‘Open Inactive’, and ‘Not Admitted’.
4. Select ‘Not Admitted’.
5. Go to the Reason For Non-Admission field.
6. Click on the dropdown arrow, and select the best reason that describes why the client/participant was not admitted.
7. Locate the navigation buttons at the bottom of the screen.
8. Click **Save**.
9. Click **Finish**.





Closing the Client Record (After the client has been discharged in SMART)

Discharging a case in SMART does not automatically close the record. After the client discharge record has been completed, go to the Intake Transaction screen. This can be accessed via the Client Activity List.

1. Go to the Date Closed field located at the bottom of the screen.

2. Click on the calendar icon, and select the appropriate date. *(format mm/dd/yyyy)*

3. Click **Save & Close the Case.**

4. Click **Save**.

5. Click **Finish**.

Note: The Episode List will indicate that the Case Status as 'Closed'. The record will be available to review with a 'Read only' status. A case must be closed prior to starting a new episode.