

SMART Tip Sheets Intake

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.

Total Pages: 5

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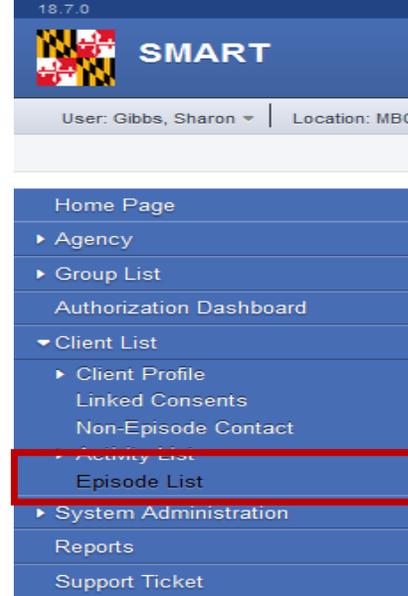
Revised: June 2018

New Episode

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

1. Entry Steps: Login, Select Facility (if applicable), from the Home screen, click **Client List**, select client, Episode List.
2. Intake: 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 **Start New Episode** to open a client case. This will open the Client Intake screen.
5. Complete all required fields.
6. Click **Save**.
7. Click **Finish**.

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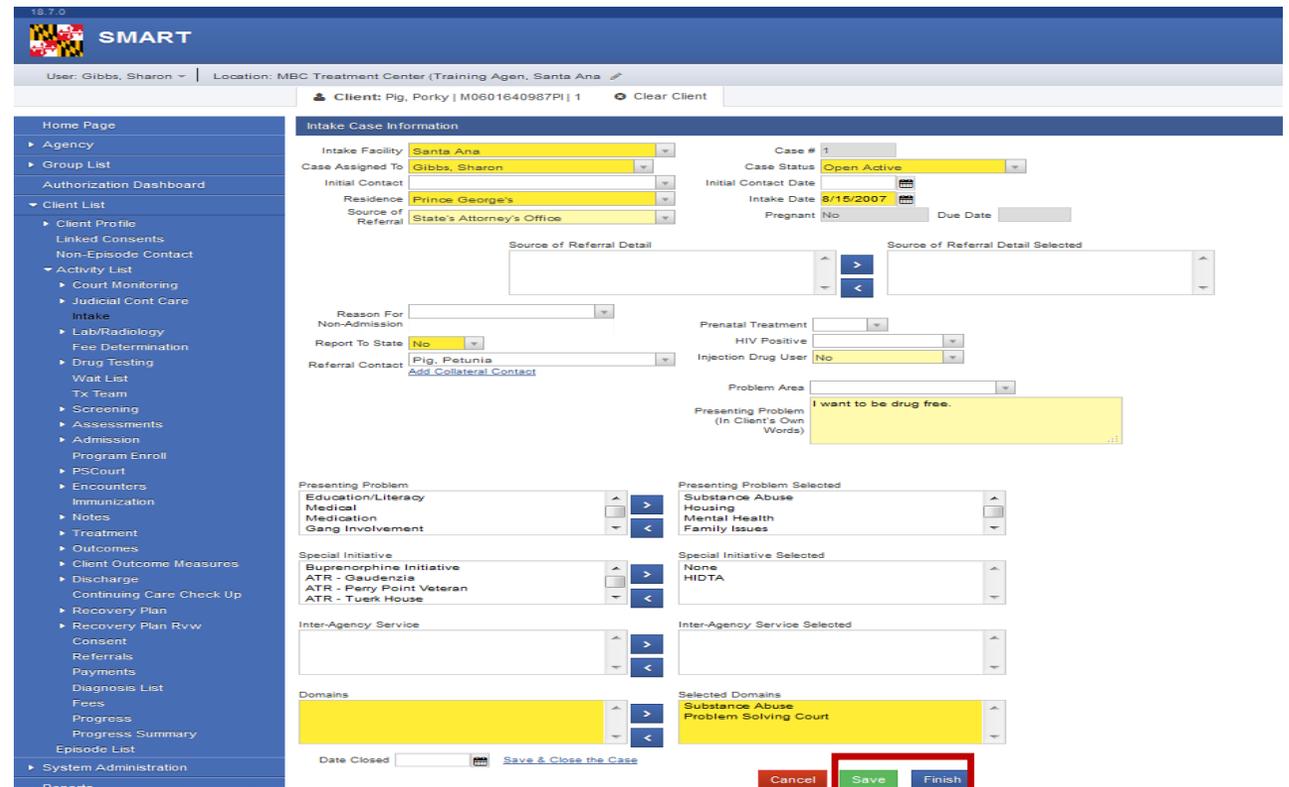


18.7.0
SMART
User: Gibbs, Sharon | Location: MBC

- Home Page
- Agency
- Group List
- Authorization Dashboard
- Client List
 - Client Profile
 - Linked Consents
 - Non-Episode Contact
 - Activity List
 - Episode List**
- System Administration
- Reports
- Support Ticket

Start New Episode	
Latest PE	Domains
Irvine/Program Enrollment without Admission : 11/1/2017 -	Substance Abuse

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



18.7.0
SMART
User: Gibbs, Sharon | Location: MBC Treatment Center (Training Agen, Santa Ana
Client: Pig, Porky | M0601640987PI | 1 | Clear Client

Intake Case Information

Intake Facility: Santa Ana | Case # 1
Case Assigned To: Gibbs, Sharon | Case Status: Open Active
Initial Contact: | Initial Contact Date: 8/15/2007
Residence: Prince George's | Intake Date: 8/15/2007
Source of Referral: State's Attorney's Office | Pregnant: No | Due Date: |

Source of Referral Detail: | Source of Referral Detail Selected: |

Reason For Non-Admission: | Prenatal Treatment: |
Report to State: No | HIV Positive: |
Referral Contact: Pig, Petunia | Injection Drug User: No |
Add Collateral Contact

Problem Area: I want to be drug free.

Presenting Problem: Education/Literacy | Presenting Problem Selected: Substance Abuse
Medical | Housing
Medication | Mental Health
Gang Involvement | Family Issues

Special Initiative: Buprenorphine Initiative | Special Initiative Selected: None
ATR - Gaudenzia | HIDTA
ATR - Perry Point Veteran |
ATR - Tuerk House |

Inter-Agency Service: | Inter-Agency Service Selected: |

Domains: | Selected Domains: Substance Abuse
Problem Solving Court

Date Closed: | Save & Close the Case

Cancel Save Finish

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**.

The screenshot shows the SMART Intake Case Information screen. The Case Status dropdown menu is open, showing three options: 'Open Active', 'Open Inactive', and 'Not Admitted'. The 'Open Inactive' option is highlighted in blue, indicating it is selected. A red arrow points from a text box to the dropdown arrow, and another red arrow points from the text box to the 'Open Inactive' option. The text box contains the instruction: 'Click on the dropdown arrow, and select 'Open Inactive'.'

The screenshot shows the SMART Intake Case Information screen. The Case Status field is now set to 'Open Inactive'. A red arrow points to the 'Open Inactive' text in the Case Status field. The rest of the screen, including the navigation menu and other form fields, remains the same as in the previous screenshot.

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**.

19 7:0

SMART

User: Gibbs, Sharon | Location: MBC Treatment Center (Training Agen, Santa Ana)

Client: Pig, Porky | M0601640987PI | 1

Intake Case Information

Intake Facility: Santa Ana

Case Assigned To: Gibbs, Sharon

Initial Contact: Prince George's

Residence: State's Attorney's Office

Source of Referral: State's Attorney's Office

Case # 1

Case Status: Open Inactive

Initial Contact Date: 8/15/2007

Intake Date: 8/15/2007

Pregnant: No

Due Date: []

Initial Contact Date: []

Intake Date: []

Pregnant: []

Source of Referral Detail

Source of Referral Detail Selected

Presenting Problem: Education/Literacy

Presenting Problem Selected: Substance Abuse

Medical: Medication

Medical Selected: Housing

Gang Involvement: []

Medical Selected: Mental Health

Family Issues: []

Special Initiative: Buprenorphine Initiative

Special Initiative Selected: None

ATR - Gaudezia

ATR - Perry Point Veteran

ATR - Tuerk House

Special Initiative Selected: HDTA

Inter-Agency Service: []

Inter-Agency Service Selected: []

19 7:0

SMART

User: Gibbs, Sharon | Location: MBC Treatment Center (Training Agen, Santa Ana)

Client: Pig, Porky | M0601640987PI | 1

Intake Case Information

Intake Facility: Santa Ana

Case Assigned To: Gibbs, Sharon

Initial Contact: Prince George's

Residence: State's Attorney's Office

Source of Referral: State's Attorney's Office

Case # 1

Case Status: Not Admitted

Initial Contact Date: 8/15/2007

Intake Date: 8/15/2007

Pregnant: No

Due Date: []

Initial Contact Date: []

Intake Date: []

Pregnant: []

Source of Referral Detail

Source of Referral Detail Selected

Reason For Non-Admission: []

Report To State: []

Referral Contact: Assessment only for recommendation and referral

Client declines admission

Has violent history/does not meet non-violence criteria

N/A

No drug/alcohol problem

Other

Other legal reason

Prenatal Treatment: []

HIV Positive: []

Injection Drug User: No

Problem Area: []

Presenting Problem (In Client's Own Words): I want to be

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.

18.7.0
SMART

User: Gibbs, Sharon | Location: MBC Treatment Center (Training Agen, Santa Ana

Client: Pig, Porky | M0601640987PI | 1 | Clear Client

Intake Case Information

Intake Facility: Santa Ana | Case # 1
Case Assigned To: Gibbs, Sharon | Case Status: Open Active
Initial Contact: | Initial Contact Date: | Intake Date: 3/15/2007
Residence: Prince George's | Pregnant: No | Due Date: |
Source of Referral: State's Attorney's Office

Source of Referral Detail: | Source of Referral Detail Selected: |

Reason For Non-Admission: | Prenatal Treatment: |
Report To State: No | HIV Positive: |
Referral Contact: Pig, Petunia | Injection Drug User: No
[Add Collateral Contact](#)

Problem Area: |
Presenting Problem (in Client's Own Words): I want to be drug free.

Presenting Problem: Education/Literacy | Presenting Problem Selected: Substance Abuse
Medical | Housing
Medication | Mental Health
Gang Involvement | Family Issues

Special Initiative: Buprenorphine Initiative | Special Initiative Selected: None
ATR - Gaudenzia | HIDTA
ATR - Perry Point Veteran |
ATR - Tuerk House |

Inter-Agency Service: | Inter-Agency Service Selected: |

Domains: | Selected Domains: Substance Abuse, Problem Solving Court

Date Closed: 09/06/2016 | [Save & Close the Case](#)

Cancel Save Finish

Actions: [Move Intake](#) [Delete Intake](#)

Use the Date Closed field to close the case/record.