Life Events User Guide

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Life Events

Life Events

Life Events are important happenings in a client's life that can affect their mental health. The *Life Events* module in SmartCare lets you document these important events. *Life Events* include:

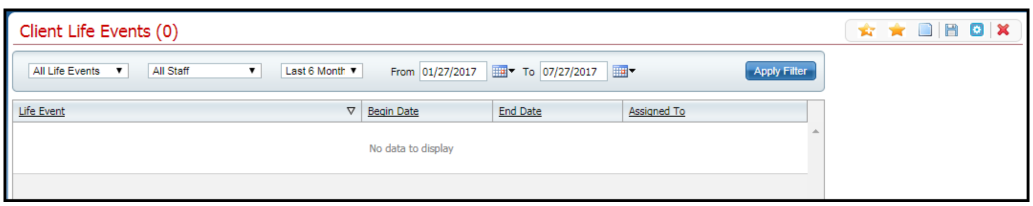
- Commitment
- Custody/Family
- Education
- Employment
- Housing
- Law Enforcement/Courts
- Mental Health
- Physical Health
- Suicide

Display the Client Life Event List Page

1. Find the **client who** you want to add a *Life Event* to. Tell me how... (See page 9).

2. Follow this path: **Client tab > Timeline/Flags/Events banner > Life Events sub-banner.**

   The *Client Life Events* list page is displayed. View field definitions (See page 7).



From this page, you can:

Add a Life Event (See page 2).

Change a Life Event (See page 3).

Delete a Life Event (See page 4).

Why can't I access these screens? (See page 17).

Add a Life Event

Use this task to add a life event to a client's record. From this task you can:

Add a Life Event (See page 2).

Change a Life Event (See page 3).

Delete a Life Event (See page 4).

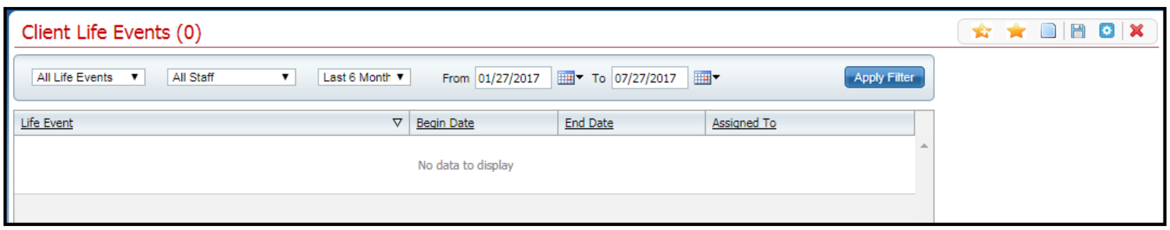
Add a Life Event

Life Events can be added to a client's record in SmartCare to document events that affect the client's physical and mental health. Use this task to document life events for a client.

1. Display the **client** you want to add a life event to. Tell me how... (See page 9).

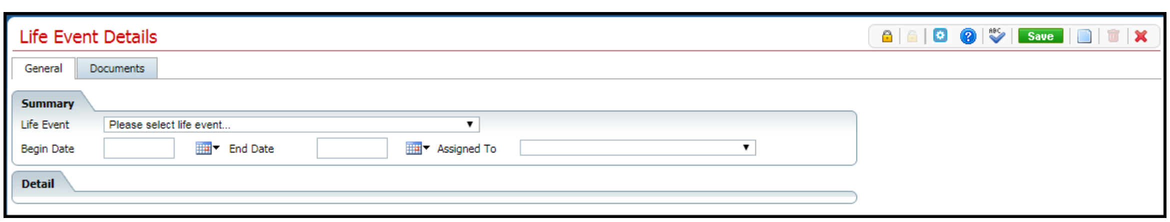
2. Follow this path: **Client tab > Timeline/Flags/Events banner > Life Events sub-banner**.

   The *Client Life Events* list page is displayed. View field definitions (See page 7).



3. Click on the **New Item**  icon in the tool bar.

   The *Life Event Details* page is displayed. View field definitions (See page 8).



4. Click on the **drop down arrow** in the *Life Event* drop down list in the *Summary* tab.

5. Select the **life event** you want to add from the drop down list. The remaining fields may change depending on the *Life Event* you chose.

6. Click on the **Life Event hyperlink** below to view field definitions specific to the life event as fields may be different depending on the life event you choose. Some examples of Life Events are provided below. However, the list for your organization may be different.

    - Commitment
    - Custody/Family
    - Education
    - Employment
    - Housing
    - Law Enforcement/Courts
    - Mental Health
    - Physical Health
    - Suicide

7. When you have completed the fields on the page, click the **Save** button in the tool bar.

8. If you want to lock the *Life Event*, click the **padlock**  icon in the tool bar.

    The padlock icon is grayed out and the unlock padlock icon is activated.

9. Click the **Exit**  icon to return to the *Client Life Event* list page.

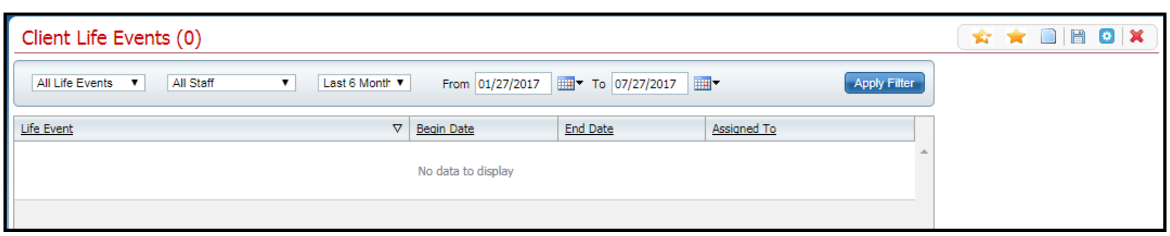
Change a Life Event

Use this task to change a life event added for a client.

1. Display the **client** you want to change a life event for. Tell me how... (See page 9).

2. Follow this path: **Client tab > Timeline/Flags/Events banner > Life Events sub-banner.**

    The *Client Life Events* list page is displayed. View field definitions (See page 7).



3. Filter the **list** to find the life event you want. Tell me how... (See page 16).

4. Click on the **hyperlinked life event name** in the *Life Event* column.

The *Life Event Details* page is displayed with the *Life Event* information listed. View field definitions (See page 8).

5. If the *Life Event* is locked, click the **Unlock padlock** icon in the tool bar. **Note:** You must have permission granted to unlock a *Life Event*.

6. Click on the **Life Event hyperlink** below to view field definitions specific to the life event as fields may be different depending on the life event you choose. Some examples of Life Events are provided below. However, the list for your organization may be different.

   - Commitment
   - Custody/Family
   - Education
   - Employment
   - Housing
   - Law Enforcement/Courts
   - Mental Health
   - Physical Health
   - Suicide

7. When you have completed the fields on the page, click the **Save** button in the tool bar.

8. If you want to lock the *Life Event*, click the **padlock** icon in the tool bar.

   The padlock icon is grayed out and the unlock padlock icon is activated.

9. Click the **Exit** icon to return to the *Client Life Event* list page.

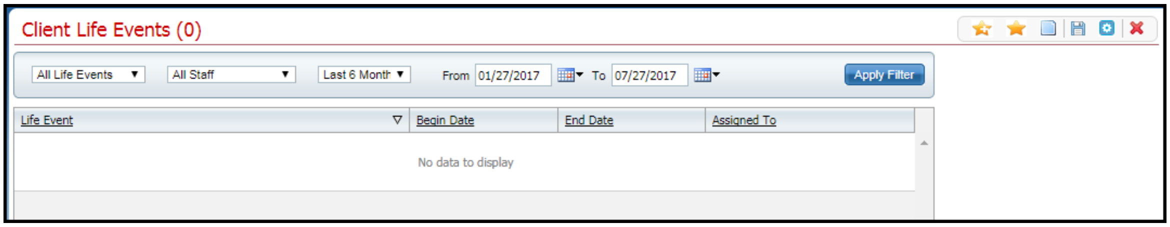
Delete a Life Event

Use this task to delete a life event for a client.

1. Display the **client** whose *Life Event* you want to delete. Tell me how... (See page 9).

2. Follow this path: **Client tab > Timeline/Flags/Events banner > Life Events sub-banner**.

   The *Client Life Events* list page is displayed. View field definitions (See page 7).



3. Filter the **list** to find the life event you want to delete. Tell me how... (See page 16).

4. Click on the **hyperlinked life event name** in the *Life Event* column.

   The *Life Event Details* page is displayed with the *Life Event* information listed.

5. If the *Life Event* is locked, click the **Unlock padlock**  icon in the tool bar. You must unlock the Life Event before you can delete it.

   Note: You must have permission granted to unlock a *Life Event*.

6. Click the **trash can**  icon in the tool bar.

   The *Confirmation Message* window is displayed.

7. Click the **Yes** button in the *Confirmation Message* window.

   The *Life Event* is deleted and the *Client Life Events* list page is displayed.

Why can't I access these screens? (See page 17).

Lock a Life Event

You can lock a *Life Event* so that no changes can be made unless a staff member has permission granted in *User/Role Setup* to unlock the event and make changes.

Lock a Life Event

1. When you have completed a *Life Event*, click the **Save** button in the tool bar.

2. Click the **padlock**  icon to lock the *Life Event*.

   The icon is changed to the *Unlock padlock*  icon.

Unlock a Locked Life Event

If a *Life Event* has been locked, the *Unlock padlock*  icon appears in the tool bar. To unlock a locked Life Event, you must have permission granted in Role Definition for your User Setup.

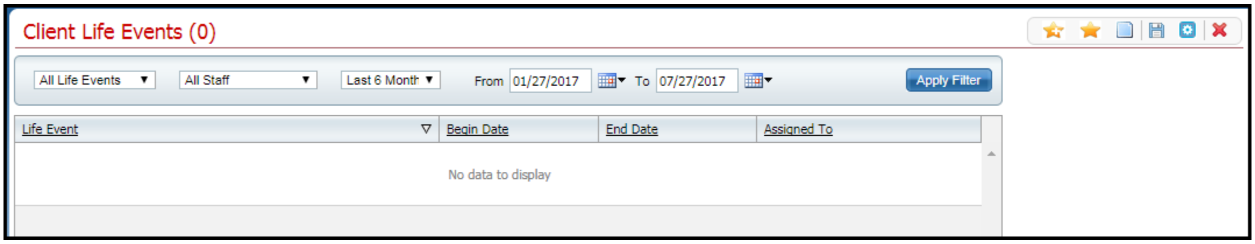
1. Display the **Life Event Details page** for the *Life Event* you want to work on.

2. Click the **Unlock padlock**  icon.

   The lock padlock  icon is activated.

Field Definitions

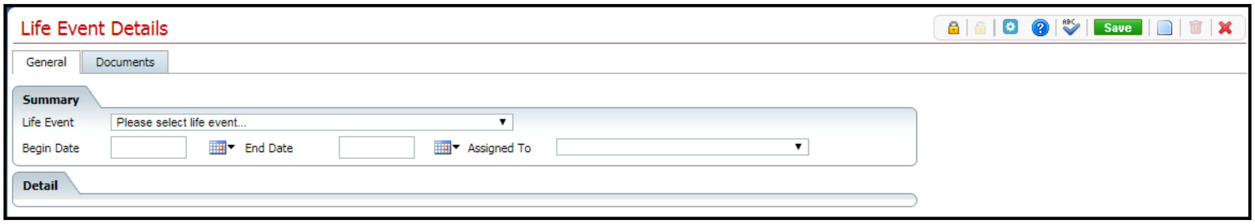
Client Life Events List Page Field Definitions



An asterisk (*).following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Filter	
All Life Events	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Life Events • Choose a Life Event from the list of all Life Events set up in the system
All Staff	Select from the drop-down list to filter records to display in the List area of the page. Options are: • All Staff • Choose a staff from the list of all staff set up in the system
Last 6 Months	Select from the drop-down list to filter records to display in the List area of the page. Options are: • Last 3 Months • Last 6 Months • Last 9 Months • Last 1 Year • Custom - when you choose Custom, the From and To date fields are cleared so you can select the custom dates.
From	Use the calendar icon to choose a starting date when you select Custom in the previous drop down list.
To	Use the calendar icon to choose an ending date when you select Custom in the previous drop down list.
List	
Life Event	Identifies the *Life Event* that was set up for the client. Click the **hyperlinked Life Event name** in the column to display the *Life Event Details* page for this *Event*.
Begin Date	Identifies the beginning date of the event.
End Date	Identifies the ending date for the event.
Assigned To	Identifies the staff member that was assigned to help the client manage this event.

Life Event Details General Tab Field Definitions



An asterisk (*).following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Summary	
Life Event*	Use the drop down list to select the life event you are documenting for the client. Options are: • Commitment • Custody/Family • Education • Employment • Housing • Law Enforcement/Courts • Mental Health • Physical Health • Suicide **Note:** When you select the *Life Event*, the *Detail* section of the page expands as shown below or may have different fields.
Begin Date	Identifies the date the life event begins.
End Date	Identifies the date the life event ends.
Assigned To	Identifies the staff member who is assigned to manage the life event with the client.

Search

Search for a Client

When you click on the drop-down arrow next to *Open* in the *Bed Census List Page*, the *Search for Client* window is displayed. In this window, you search for the client you want to admit. If the client has already been registered in the system, use that client record to complete the admission. If the client is not found, then follow your office's policy for registering the client.

Searching Best Practices

- To avoid duplicate records, use due diligence to ensure the client is not already entered in the system.
- Use the defined search strategy as explained in the procedure below.
- Use more specific searches found in the *Other Search Strategies* section, as needed.
- If no matches are found, assume the client is new and has not been registered in the system. Follow your office policy for registering the client.

To Search for a Client

1. When the *Client Search* window is displayed, complete the **Name Search, SSN Search** and **DOB Search** fields. View field definitions (See page 9).
2. Click the **Broad Search** button.
3. If no client is found, click the **Narrow Search** button.
4. If no client is found, click the **SSN Search** button.
5. If no client is found, click the **DOB Search** button.
6. When using *Other Search Strategies*, enter the information you want to search on and click the blue button to the left of the field to start the search.
7. If a matching record is found, the information is displayed in the *Records Found* tab.

   a. Verify that the information that is listed matches the client you are working with.

   b. If more than one client is listed, select the open circle to the left of the client line to select the client in the *Records Found* section.

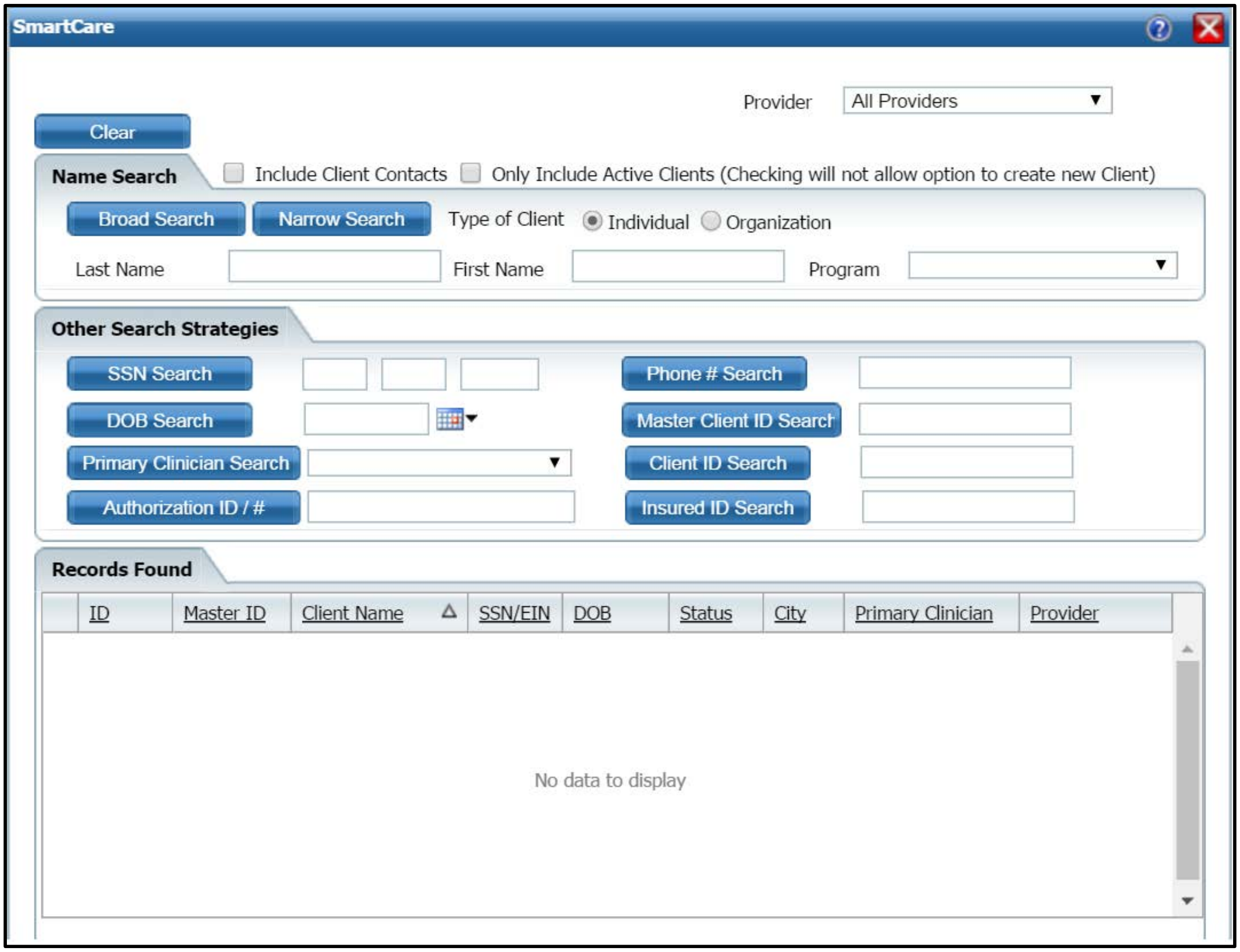
   c. Click the **Select** button.

   -or-

   If no match is found, the client is not registered in the system.

Why can't I access these screens? (See page 17).

Client Search Window Field Definition



An asterisk (*).following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Clear button	Use to clear any information filled in the field before you conduct a new search.
Include Client Contacts	Select the include contacts of the client in the search. Use this check box to include a client's contact person in the search.
Only Include Active Clients	The search only searches through clients marked as Active. If you select this checkbox, you will not be able to create a new client.
Name Search tab	
Last Name	Enter the client's last name that you are looking for. Type up to 30 characters.
First Name	Insert the client's first name that you are looking for. Type up to 20 characters.
Program	Select the Program that the client is registered in.
Other Search Strategies	
SSN Search	Enter the client's social security number in the fields provided.
DOB Search	Enter the client's date of birth in mm/add/yyyy format or select from the calendar icon.
Primary Clinician Search	To search by primary clinician, select the clinician using the drop-down list.
Phone # Search	To search by the client's phone number, type the phone number with no hyphens.
Master Client ID Search	To search by Master Client ID, type the ID number in the field.

Field	Description
Client ID Search	To search by the client's ID, type the ID number in the field.
Insured ID Search	To search by the insured ID, type the ID number in the field. This is the ID that is assigned to the person who carries the insurance for the client.
Records Found	
ID	Identifies the Client's ID assigned in SmartCare.
Master ID	Identifies the Client's Master ID if one is assigned in SmartCare.
First Name	Identifies the client's first name.
Last Name	Identifies the client's last name.
SSN	Identifies the client's social security number.
DOB	Identifies the client's date of birth.
Status	Identifies the client's current status in SmartCare.
City	Identifies the client's city of residence.
Primary Clinician	Identifies the primary clinician assigned to the client.
Provider	Identifies the provider assigned to the client.

Miscellaneous

Check for Spelling Errors in a Free-form Comment Field

When you have entered text in free-form comment fields on a page or window, if the spell check icon is present in the task bar, you can check for spelling errors in the comment fields.

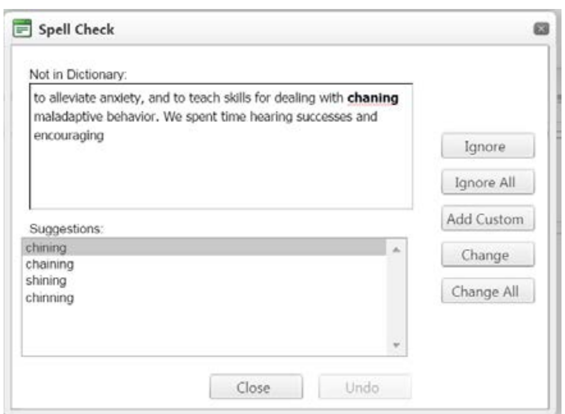
1. Complete all comment fields on a page or window.

2. Click the **spell check**  icon in the task bar.

   Spell Check searches all comment fields.

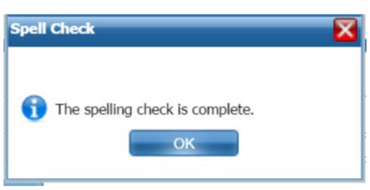
   If a misspelled word is found, the *Spell Check* window is displayed.

3. Notice that the misspelled word is bolded and underlined with a red dotted line in the *Not in Dictionary* panel. Suggestions for correct spellings are listed in the *Suggestions* panel. View field definitions. (See page 13).



-or-

If the *Spell check is complete* window is displayed, the spell check is complete.

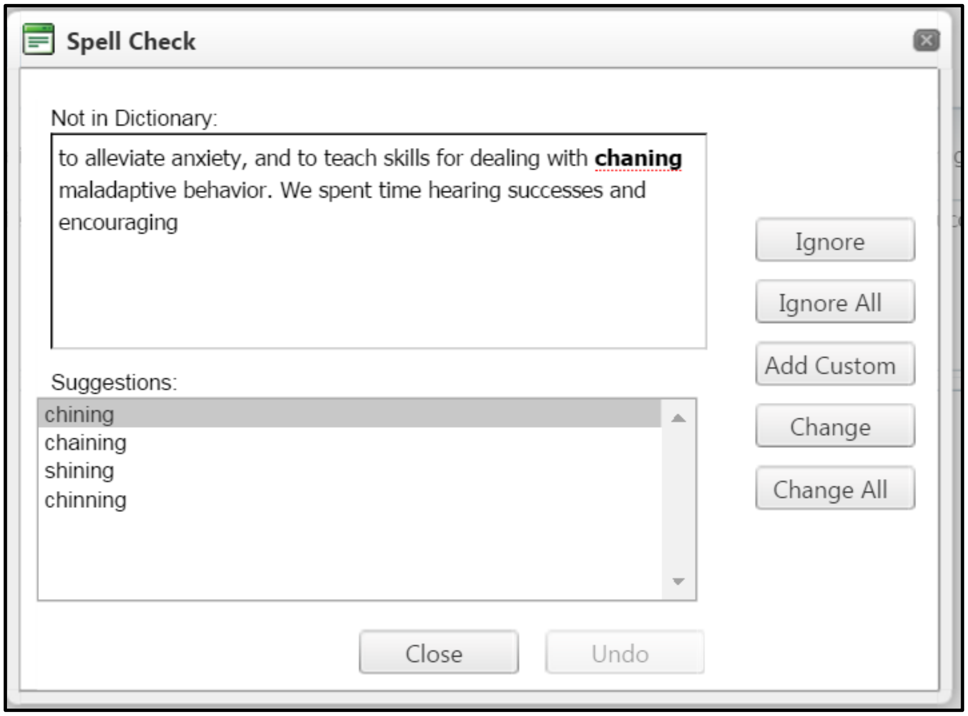


4. Click the **Yes** button in the *Spell check is complete* window.

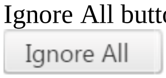
   The page you started the *Spell Check* from is displayed.

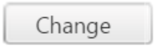
Why can't I access these screens? (See page 17).

Spell Check Window Field Definitions



An asterisk (*).following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Not in Dictionary	
<text>	Displays the text that contains a misspelled word(s). The first misspelled word is bolded and underlined with a red dotted line.
Suggestions	
Word list	Words suggested by *Spell Check* to replace and correct the misspelled word. If no suggestions are listed, place your cursor in the misspelled word in the *Not in Dictionary* panel and correct the spelling. Click the **Change** or **Change All** button to correct the spelling.
Buttons	
Ignore button 	Click the **Ignore** button to accept the spelling as it is shown in the comment field. Spell check displays and highlights the next misspelled word, if there are any.
Ignore All button 	Click the **Ignore All** button to accept all incidents of the currently highlighted misspelled words as shown in the comment field.
Add Custom button 	Click the **Add Custom** button to add the word to the system dictionary. If you add the word with its shown spelling, it will not no longer be shown as a misspelled word. Use this function for words, such as brand name words, or commonly used abbreviations in your facility. By adding these custom words, they will no longer be shown as misspelled. When you click the *Add Custom* button, a message window asks if you want to add the word to the dictionary. Click **Yes** to save the word.

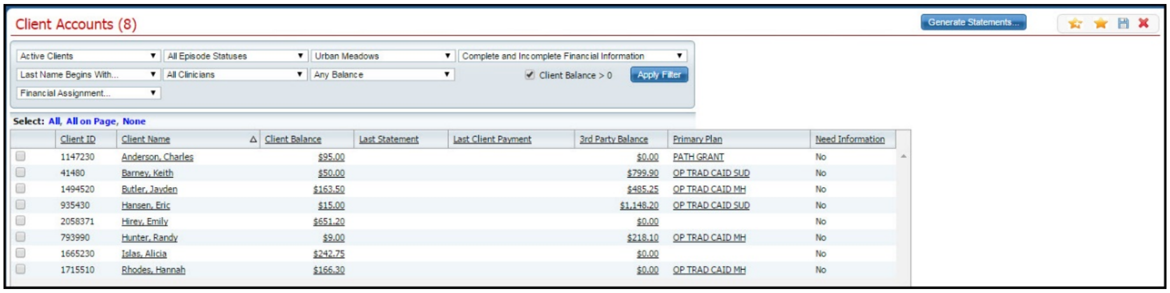
Field	**Description**
Change button 	In the *Suggestions* panel, highlight the correctly spelled word and click the **Change** button. The next misspelled word is displayed and highlighted in the *Not in Dictionary* panel.
Change All button 	In the *Suggestions* panel, highlight the correctly spelled word and click the **Change All** button to correct all instances of this same misspelled word. The next misspelled word is displayed and highlighted in the *Not in Dictionary* panel.
Close button 	When you have finished correcting misspelled words, click the **Close** button. The *Spell Check Complete* window is displayed if all misspelled words have been corrected or ignored.
Undo button 	Click the **Undo** button to undo the last action that you took in the *Spell Check* window.

Export the Records on the List Page

You can export the authorizations on the list page to an Excel spreadsheet.

1. Display the *Authorizations* list page. Tell me how...

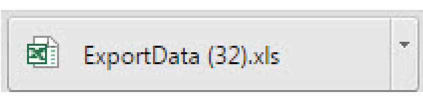
   The *Client Accounts* list page is displayed. View field definitions.

2. Filter the list to determine the records that are displayed. Tell me how...

3. When the records are displayed that you want to export to an Excel spreadsheet, click the **Export**  icon in the tool bar.

   The *ExportData* button is displayed in the footer of your browser window.

4. Click on the **button** to open the Excel file.

   The file is opened in an Excel spreadsheet. You can edit, print and save the file as needed.

Filter a List Page

A list page displays a list of all the content categories on the page. Using the filters you can narrow the list of information that you view. The filters vary depending on the content of the list.

1. Follow a path from a banner selection to display a list page.

   The list page is displayed

2. In the drop-down lists in the *Filter* box, select the items in each drop-down list to limit what is displayed on the page.

3. Click the **Apply Filter** button.

   Note: The filter that you apply to that page remains until you change the filters and click the *Apply Filter* button again.

4. When the list is displayed, click on a **hyperlinked item** to view the detail page for that item.

Why Can't I Access a Screen?

You can only access screens that your user sign on has been granted access to. This property is referred to as *Permissions*. Use the table below to find the screen you need access to and determine the Permissions that are needed. To solve this, you need to discuss this issue with your system administrator to have the Permissions changed.

To access *Permissions:*

1. Follow this path: **Administration** > **User/Role Setup > Role Definition.**

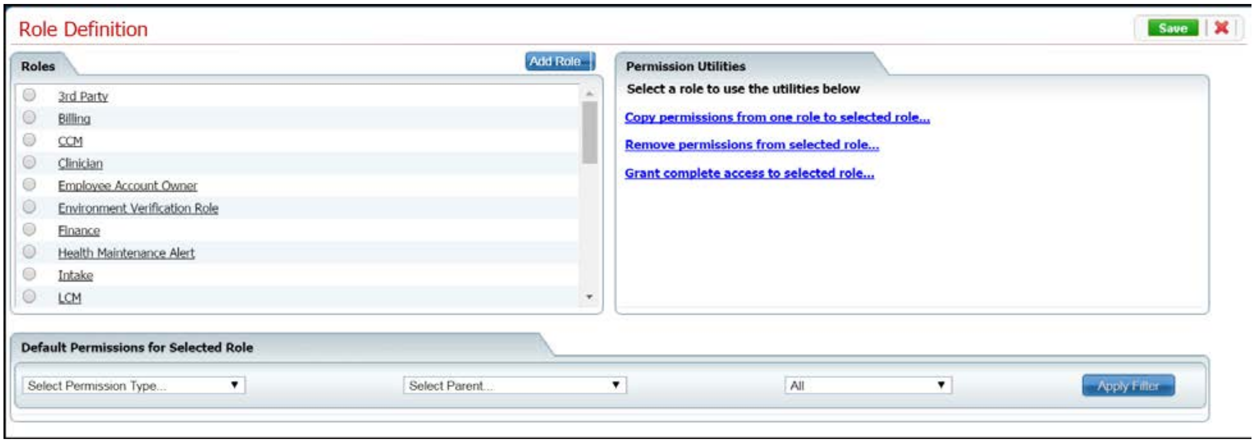
   The *Role Definition* page is displayed. View field definitions (See page 17).

From the *Permissions* page, you can:

Determine Which Permissions Are Needed for the Client Life Events List Page

You Need Permission Type	Parent	Permission Item
Banners	Client	Timeline/Flags/Events
Banners	Client	Life Event (Life Events)
Screens	Client	Life Event Details

Role Definitions Page Field Definitions



An asterisk (*).following the field name indicates a *Required* field in the Core SmartCare system. Your system may have been customized to require additional fields.

Field	Description
Roles	
Roles	All roles defined in the system. A role defines a collection of permissions to make it easier to assign permission to each staff member who will use the system. Permissions are assigned to staff to give them permission to access list pages, screens and windows in SmartCare.
Add Role 	Click the **Add Role** button to add a new role to the system and assign permissions to that role.
Default Permissions for Selected Role	
Select Permission Type	Use this drop down list to display one permission type for the selected role.
Select Parent	Use this drop down list to select a specific parent type to view.
All	Use this drop down list to select to view all permissions, Granted permissions or Denied permissions for the selected role.
Permission Utilities	
Selected Role	This field appears if you have selected a role in the *Roles* section.
Copy permissions from one role to selected role	Click the **hyperlink** to copy permissions set up for one role to the Selected Role. When you click the **Save** button, all permission are copied from the role you select in the *Copy Permission from...* drop down list. However, If there are permission already set up on the *Selected Role*, these permission are **not** overridden.
Remove permissions from selected role	Use this option to remove all permissions from the selected role.
Grant complete access to the selected role	Use this option to grant all permissions in the system to the selected role.