

SMART Tip Sheets

Adding a New Client

Adding a New Client Record

Client Search

Client Profile

This set of tip sheets focuses on how to create an electronic client record. In addition, it will cover how to search and pull up a client record.

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Adding A New Client

Client Search

1. **Entry Steps:** Login, Select Facility (if applicable), from the Home screen, click **Client List**. (Note: This will open the Client List screen which contains the client search engine).
2. **Client Search:** Always search to see if a client record exists at your agency prior to creating a new record in SMART. Enter your search criteria by entering the client's First Name, and/or Last Name, and/or SSN, and/or DOB, etc. or a combination. However, the more criteria used in the search, the more specific the search and the client may/may not appear; therefore, it is not recommended to use multiple fields at the same time. Broaden the search by using an '*' (asterisk) in place of letters if you are uncertain of the spelling (i.e., Pi* searches for all client names beginning with 'Pi' at your agency.)

Note: The easiest way to search is to click Go without entering any search criteria. However, this search option is only available for agencies with fewer than 1000 client records.



The screenshot displays the SMART Client Search interface. The top navigation bar includes the SMART logo, user information (User: Gibbs, Sharon), location (MBC Treatment Center (Training Agen, Santa Ana)), and a Logout button. The main content area is titled 'Client Search' and contains several input fields: Agency (MBC Treatment Center (Training Agen)), Facility (dropdown), First Name (Porky), Last Name (Pig), SSN, DOB, SMART Client Id, Unique Client Number, Agency Client ID, Treatment Staff (dropdown), Primary Care Staff (dropdown), Case Status (All Clients), Case Assigned To (dropdown), Other Number, and Number Type (dropdown). There is an 'Include Only Active Consents' checkbox set to 'Yes'. Below the search fields are 'Clear' and 'Go' buttons. A red box highlights the 'Go' button and contains the text: 'Enter search criteria, i.e. first name and/or last name. Click Go.'

Below the search fields is a table titled 'Client List (Export)' with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table contains two rows of client data:

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	M0601640987P1	Pig, Porky	6/11/1964	345-78-0987	Male
	M0906649874P1	Pig, porky	9/6/1964	987-52-9874	Male

Below the table is a section titled 'Clients with Consents from Outside Agencies' with columns: Actions, Agency, Unique Client #, Client Name, DOB, SSN, and Gender. This section is currently empty.

The second screenshot shows the same SMART Client Search interface, but with the search criteria cleared. The 'Go' button is highlighted with a red box, and a text box next to it says: 'e the search engine and click Go.'

Below the search fields is a table titled 'Client List (Export)' with columns: Actions, Unique Client #, Full Name, DOB, SSN, and Gender. The table contains several rows of client data:

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	F1007923212CL	Client, New	10/7/1992	888-09-3212	Female
	M1004009878CL	Client, New	10/4/1900	987-85-8878	Male
	F1102340078CL	Clinc, Patsy	11/2/1934	111-44-0078	Female
	F0305312782CL	Clinton, Hillary	3/6/1931	187-23-2782	Female
	M1102050542CO	Code, Zip	11/2/1906	987-85-0542	Male
	M0301785544CO	Comment, Test	3/1/1976	234-00-5544	Male

Below the table is a section titled 'Clients with Consents from Outside Agencies' with columns: Actions, Agency, Unique Client #, Client Name, DOB, SSN, and Gender. The table contains several rows of client data:

Actions	Agency	Unique Client #	Client Name	DOB	SSN	Gender
	WDC Training Agency	F1141009811CO	BOCK, JONNE	11/27/1900	642-42-0047	Female
	Zjutins Eastern Shore Recovery (Training)	M0009054321CO	Colvin, Lenny	0/5/1906	987-85-4321	Male
	WDC Training Agency	F0601649687CR	Diuz, Sam	6/1/1994	830-38-9687	Female
	WDC Training Agency	F0517979894CU	Curtain, Stephanie	5/17/1907	836-38-9084	Female
	Zjutins Eastern Shore Recovery (Training)	F0816892222LO	Long, Morgan	8/16/1989	222-22-2222	Female
	Administrative Agency (MD-100100)	M0101780303SI	Sloth, Maron	1/1/1978	123-00-0303	Male
	WDC Training Agency	M1019783132US	User, ADAA	10/19/1978	223-09-3132	Male

Adding A New Client

Viewing an Existing Client record or Adding a New Client Record

1. **Client List:** After searching for the client and if the client exists in your agency, the client's name appears in the Client List in the middle of the screen. This area provides access to clients that have records in that agency. To view an existing client record, go to the Actions column, hover over the icon that resembles a pencil (the edit control), and click **Profile** or **Activity List**.
2. **Clients With Consents From Outside Agencies:** After searching for the client, the same name may also be listed in the Clients With Consents From Outside Agencies list at the bottom of the screen. This area identifies which agency's client file has been consented to the agency that the user is currently logged into, by viewing the Agency field in the list box. Clicking Activity in this area allows users to view the consented client information from the sending agency. Each agency's consented activities must be viewed separately. Note: There is not any re-disclosure of consented client information in SMART.
3. **Adding a Client Record:** If the client's name does not appear in the Client List after searching, click **Add Client** (located below the **Clear** and **Go** navigation buttons.)

The screenshot displays the SMART system interface. At the top, there is a navigation bar with the SMART logo and user information. Below this is a search bar with the text 'Client: Ptg, Porly | M0601640967P1 | 1' and a 'Clear Client' button. The main content area is divided into two sections. The top section is the 'Client Search' form, which includes fields for Agency, Facility, First Name, Last Name, SSN, DOB, SMART Client ID, Unique Client Number, Agency Client ID, Treatment Staff, Primary Care Staff, Case Status, Case Assigned To, Other Number, and Number Type. There are 'Clear' and 'Go' buttons at the bottom of the search form. The bottom section is the 'Client List (Export)' table, which has columns for 'Actions', 'Unique Client #', and 'Full Name'. The table contains several rows of client information. A blue callout box with white text is positioned to the right of the search form, containing the text: 'Hover over the desired client's name. This will review some options, i.e., Profile, Activity List, Linked Consents. Click Profile to view the client demographic information, and click Activity List to view the activities/services rendered for the client.' Red arrows point from this callout box to the 'Actions' column in the Client List table and the 'Agency' field in the 'Clients with Consents From Outside Agencies' table. The 'Clients with Consents From Outside Agencies' table has columns for Agency, Unique Client #, Client Name, DOB, SSN, and Gender. It lists several agencies and their associated client information.

Agency	Unique Client #	Client Name	DOB	SSN	Gender
WDC Training Agency	F112700907BU	BOER, LUDIE	11/27/1900	6-95-39-9007	FEMALE
ZJustin's Eastern Shore Recovery (Training)	M0000664321CO	Colvin, Lenny	6/6/1956	987-65-4321	Male
WDC Training Agency	F0601649087CR	Cruz, Sam	6/1/1964	630-38-9087	Female
WDC Training Agency	F0517679084CU	Curtain, Stephanie	5/17/1967	636-38-9084	Female
ZJustin's Eastern Shore Recovery (Training)	F0816892222LO	Long, Morgan	8/19/1989	222-22-2222	Female
Administrative Agency (MD-100100)	M0101780303SI	Sixth, March	1/1/1978	123-00-0303	Male
WDC Training Agency	M1019783132US	User, ADAA	10/19/1978	223-09-3132	Male

Consented client information electronically received from another agency will appear at the bottom of the Client List screen.

Adding A New Client

Create Client Profile

1. Entry Steps: Login, Select Facility (if applicable), Client List, Client Search

2. Client Profile: The Client Profile is used to capture client demographic information. After clicking Add Client, the Client Profile screen opens. Complete all system (dark yellow), and state reporting (pastel/light yellow) required fields. There are several screens within the Client Profile module, including Alternate Names, Additional Information, Contact Information, etc. that require completion. *Use the navigation buttons to move from screen to screen.*

Note: The Agency Client Id field on the Client Profile screen is not a required field for Problem Solving Courts. *Problem solving courts can enter a court case number or MD SID in this field, but please note, this information must also be entered on the Other Numbers screen.*

- Alternate Names: This screen is used to capture any name changes, i.e., marriage, nicknames, alias, etc.
- Additional Information: This screen is used to capture race, ethnicity, education, and veteran's status.
- Contact Information: This screen is used to document any telephone numbers and addresses for the client.
- Collateral Contacts: This screen is used to document the names, addresses, and phone numbers of all parties (problem solving court team, treatment team, parole and probation, family members, etc.) serving the needs of the client.
- Other Numbers: This screen is used to document the Court Case Number, MD SID, other social security numbers, etc.

18.7.0

SMART

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

Client: Pig, Porky | M0601640987PI | 1 Clear Client

Home Page

- Agency
- Group List
- Authorization Dashboard
- Client List
 - Client Profile
 - Alternate Names
 - Additional Information
 - Contact Info
 - Collateral Contacts
 - Other Numbers
 - History
 - Client Group Enrollment
 - Authorization
 - Health Choice
 - Allergies
 - Linked Consents
 - Non-Episode Contact
 - Activity List
 - Episode List
- System Administration
- Reports

Profile

First Name: **Porky**

Middle Name:

Last Name: **Pig**

Mother's Maiden Name:

Suffix:

Gender: **Male**

DOB: **6/1/1964**

SSN: **345-78-0987**

Agency Client ID: **3421**

Unique Client Number: M0601640987PI

State Client ID:

Record Created By: Gibbs, Sharon

Last Updated By: Gibbs, Sharon

Created Date: 8/27/2007 3:28 PM

Last Updated Date: 9/13/2016 10:43 AM

Residence Zip Code: **20742**

County: **Prince George's**

Driver's License:

Medicaid ID:

Employment Status in the Last Six Months:

Marital Status:

Has paper file: **Yes**

Administrative Actions: [Download c32](#) [View c32](#)

Cancel Save Finish

If you use the Agency Client ID field to enter your client's MD SID or Case Number, you must also use the Other Numbers screen to document these numbers.

Use right arrow to move to the next screen.