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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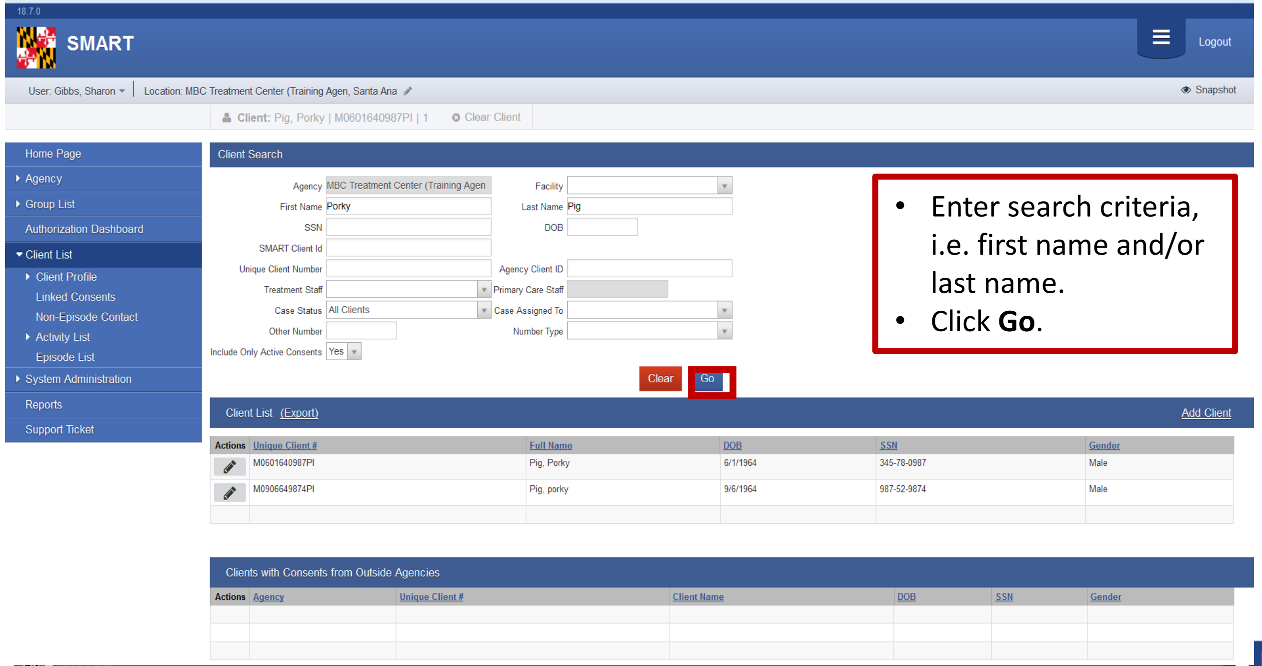
Adding A New Client

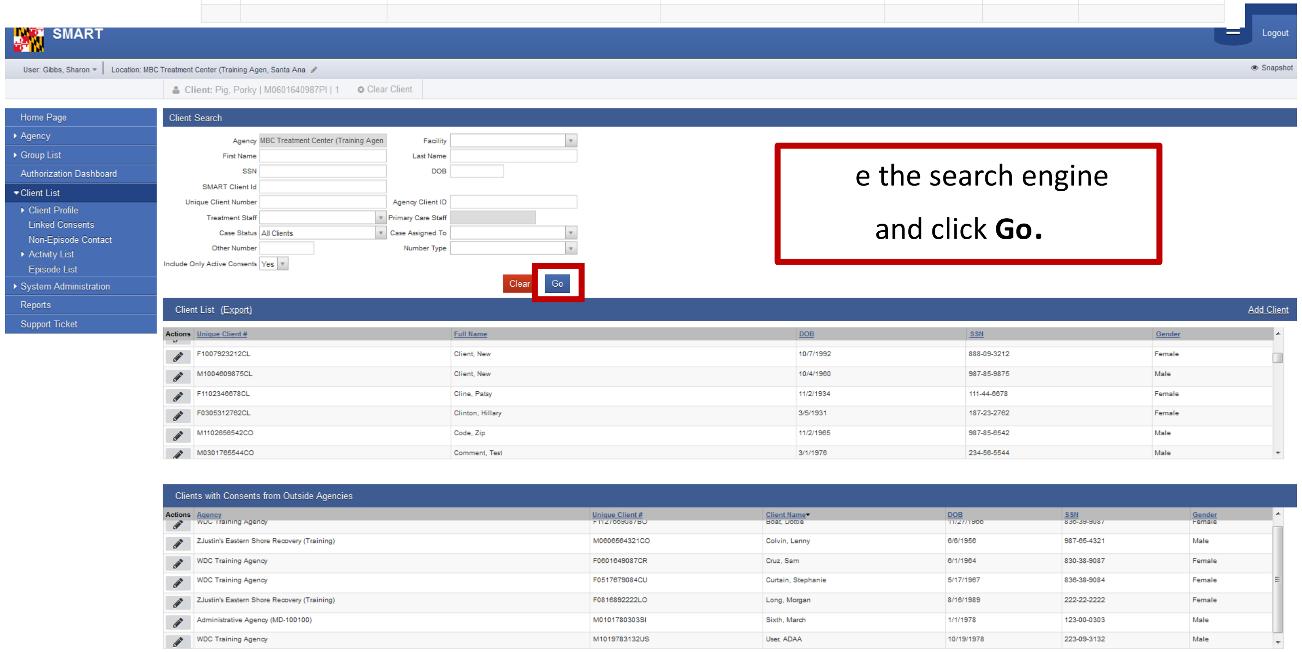
Client Search

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.





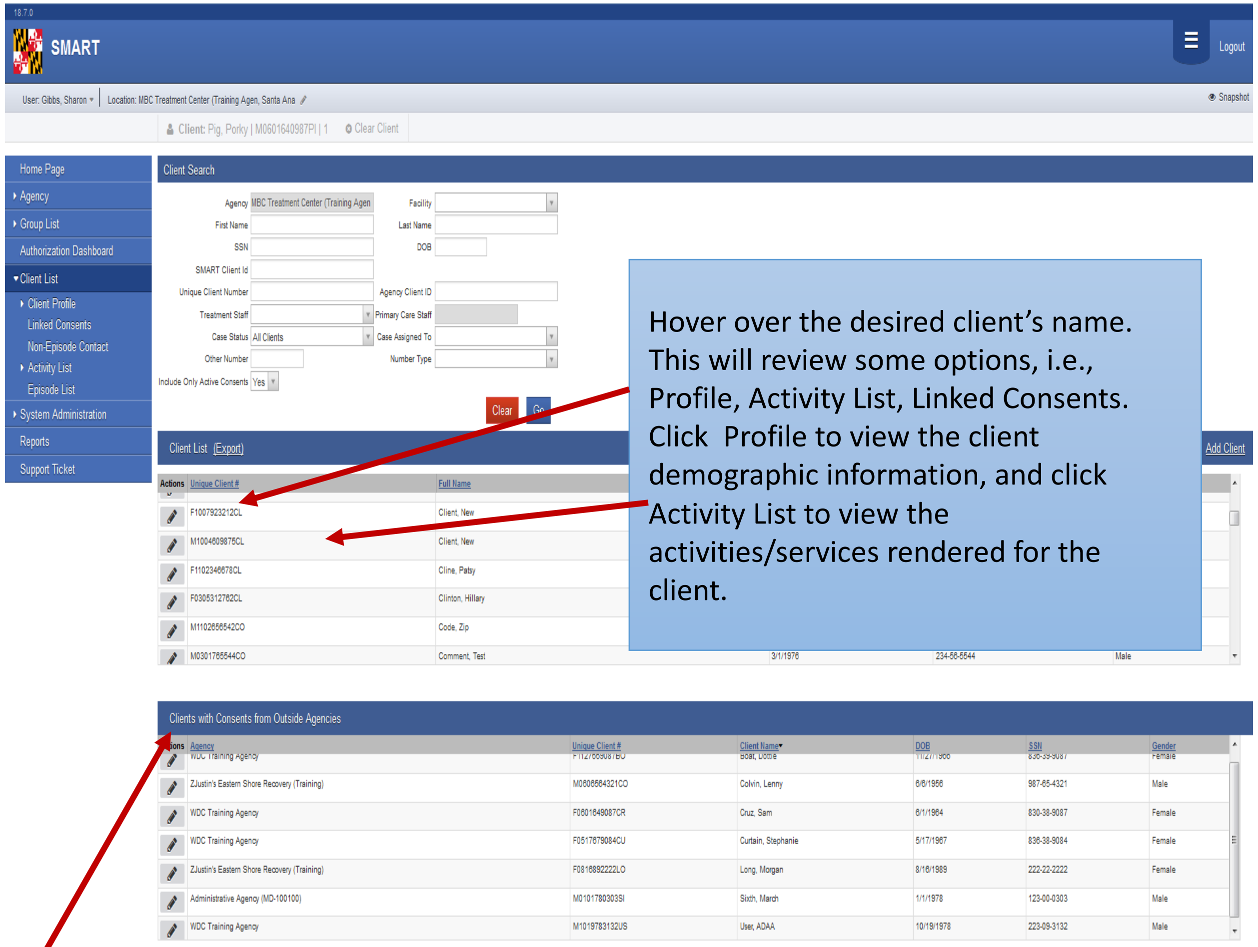
Adding A New Client

Viewing an Existing Client record or Adding a New Client Record

1. <u>Client List</u>: 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. <u>Clients With Consents From Outside Agencies:</u> 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 form 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. <u>Adding a Client Record</u>: If the client's name does not appear in the Client List after searching, click <u>**Add Client**</u> (located below the **Clear** and **Go** navigation buttons.)



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.

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

Adding A New Client

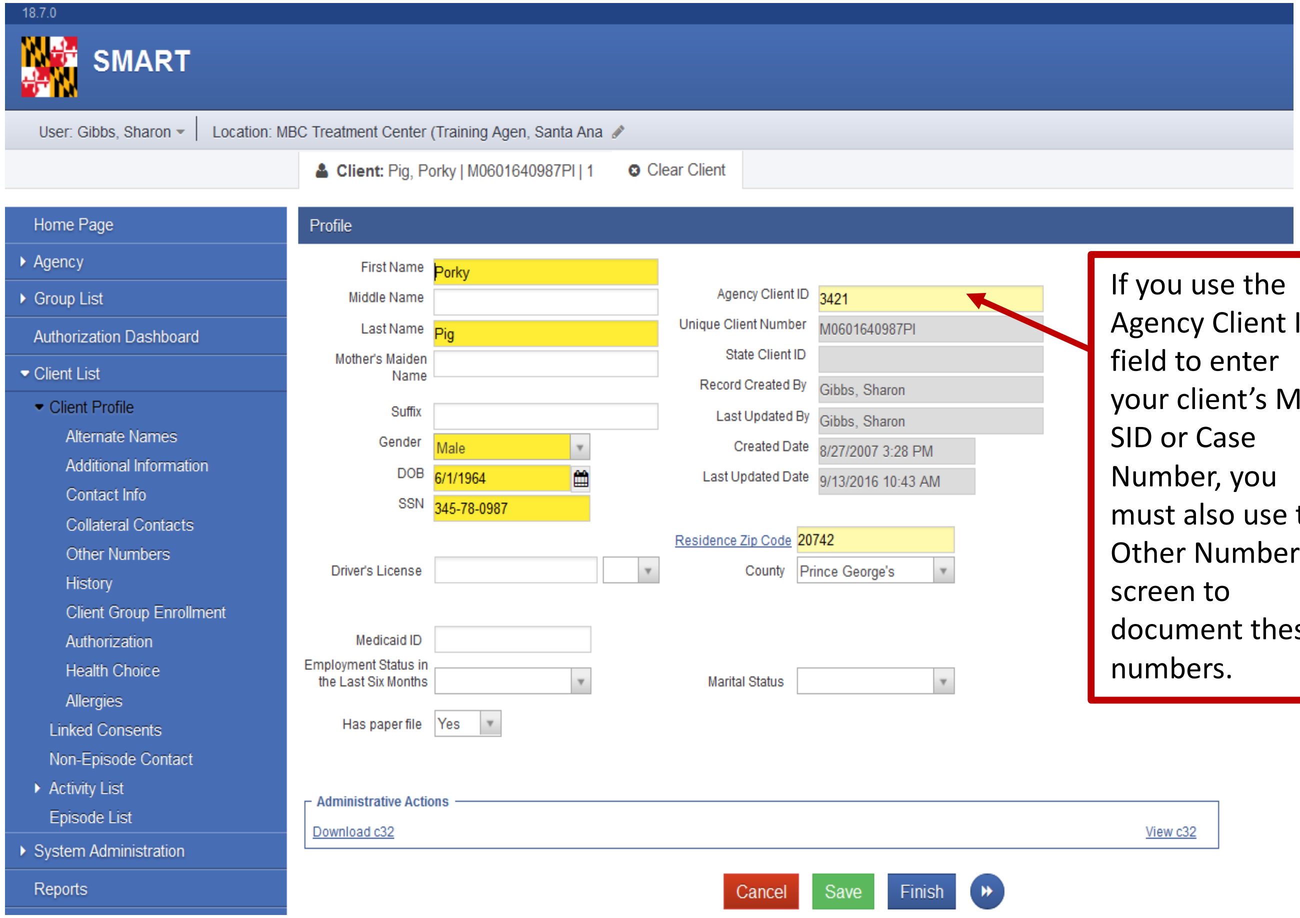
Create Client Profile

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.



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.