

# SMART Tip Sheets

## Basic Navigation

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### SMART Basic Navigation

Menus/Toolbars

Navigation Buttons/Table Actions

Controls

Conventions

This tip sheet focuses on the elements required for navigation and data entry.

**Total Pages: 6**

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## SMART Basic Navigation

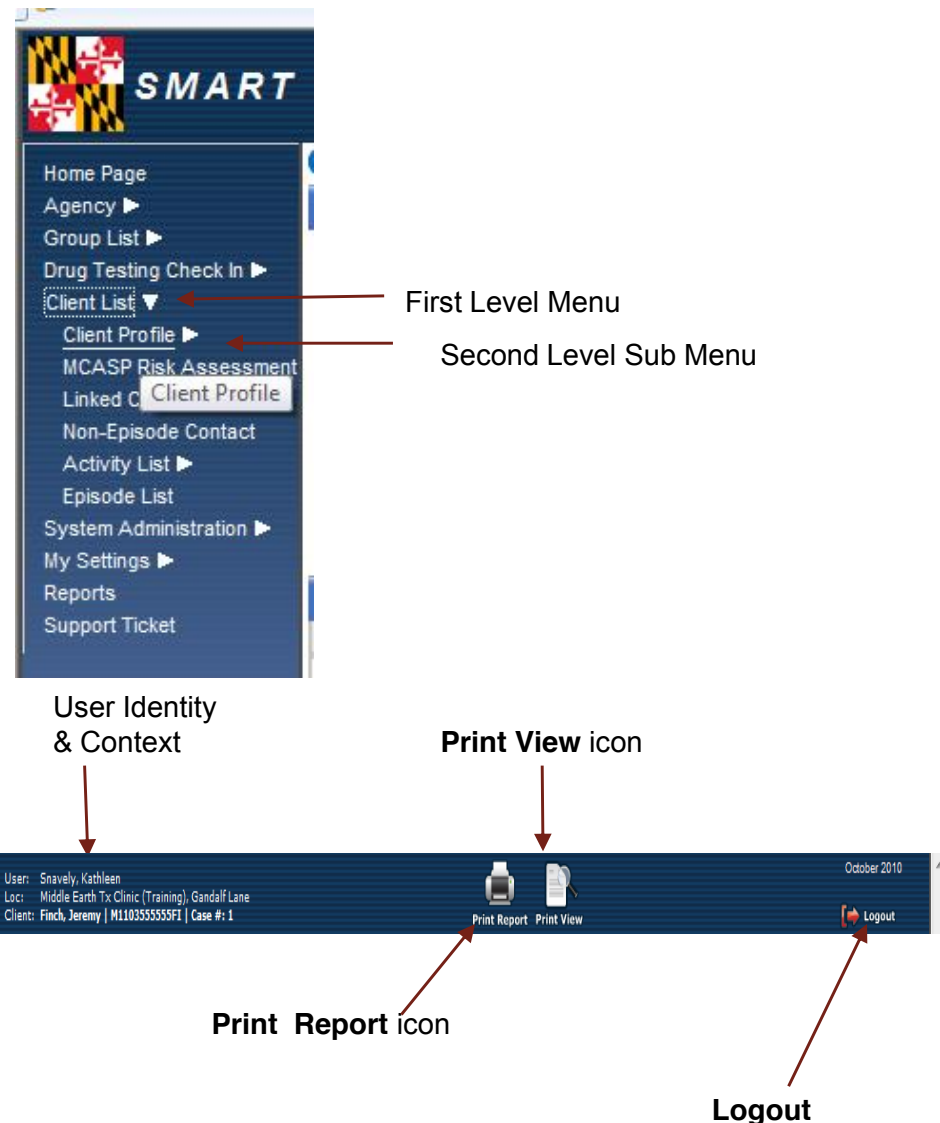
### Menus/Toolbars

1. **Menus:** The SMART Main Menu appears in the far left column of the screen. First level menu items are left-most aligned and may include: **Home**, **Agency**, **Client**, **My Settings**, **Reports**, among others (depending on the user's level of access).

**Sub-Menus:** Once the user has selected a First Level function, using the First Level Menu selection (e.g. **My Settings**), the menu expands to display the Second Level Sub-Menus. The Sub-Menus allow the user to navigate to specific screens without having to use next and back keys. Sub-Menus can be identified by a small triangle to the right of the label (pointing to the right). The triangle points down when the Sub-Menu is displayed. To choose a menu item, put your mouse over the item and single click the item.

2. **Toolbar Icons:**

- The Browser Label depicts the name of the browser vendor (e.g. Microsoft Internet Explorer).
- User Identity & Context identify the User (person logged into SMART), the Location (agency/facility the user is logged into) and the client's record opened to be worked on.
- The **Print View** icon, allows the user to print a formatted record of the module being worked on and is available on all screens.
- The **Print Report** icon, allows the user to print a formatted record of the module being worked on.
- **Logout** allows the user to logout of the application.



## SMART Basic Navigation

### Navigation Buttons/Table Actions

1. **Navigation Buttons:** The **Go** button is used to initiate a query (e.g. Clicking **Go** from the **Client Search** screen will generate a list of clients at the agency).

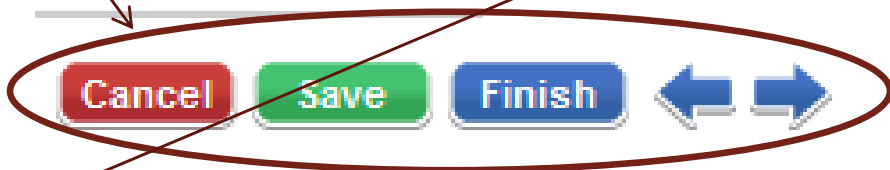
- a. **Cancel, Save, Finish** ← and → allow the user to move through a particular SMART module (e.g. **Admission**), where **Cancel** cancels your transaction and no work is saved; **Save** saves your work, but you remain on the same screen; **Finish** saves your work and returns you to the original screen; **Previous** takes you to the previous screen; and → advances you to the next screen in the module.

2. **Table Actions & Hyperlinks:** Table actions allows the user to create, edit or delete information.

- a. A yellow underlined hyperlink, allows the user to create (add) a new record. For example, clicking **Add Client** will allow the user to add a new client record.
- b. Blue underlined hyperlinks, allows the user to take actions. For example, **Review** allows the user to review an existing record. **Delete** allows the user to delete a record.

Client ID	Full Name	DOB	SSN	Gender	Actions
M110355555F1	Finch, Jeremy	11/3/1955	123-77-5559	Male	<a href="#">Profile</a>   <a href="#">Activity List</a>   <a href="#">Delete Record</a>

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Drug Court Agency (Training Only)	M110355555F1	Finch, Jeremy	11/3/1955	123-77-5555	Male	<a href="#">Activity List</a>
Z Peace World	M1222345544F1	Finch, Jeremy	12/22/1994	111-44-5544	Male	<a href="#">Activity List</a>



Last Name	First Name	Middle Name
Finch	Jer	

## SMART Basic Navigation

### Controls

- 1. Textbox:** Text boxes are designed to allow the user to enter data in manually. Some text fields have specific formats which must be used for example:
  - a. DOB/Date: mm/dd/yyyy
  - b. SSN: nnn-nn-nnnn
  - c. Phone Number: nnn-xxx-nnnn
- 2. Scrolling Textbox:** Scrolling textboxes are used to capture notes and descriptions. A scrolling textbox allows the user to enter at least 500 characters. Some have no character limits. An example of a scrolling textbox is a **Comment** field.
- 3. Drop-down box:** A drop-down box is used where only one entry may be selected from a list of values.
- 4. Mover Box:** A mover box is used where more than one entry may be selected from a list of values. Some may scroll. Must display at least 4 rows of text.
- 5. Mover Box with Radio Buttons:** The user selects an option with a single left click. Before selecting the mover arrow, the user must select an option, using the radio buttons located between the boxes. In this example, if the user selects **# of Days**, the user clicks the **Radio Button**, and put the number of days in the textbox using the keyboard. The user then moves the options to the select box using the upper arrow adjacent to the Selected Options box.

First Name

First Name Shirley

DOB  →

SSN

Phone Number

Comments

Living Arrangement

Race Selected Race

Alaska Native	▲	▼	American Indian
Asian Indian	▲	▼	
Black, African Am., Or Negro	▲	▼	
Chinese	▲	▼	

Ethnicity Selected Ethnicity

Cuban	▲	▼	Mexican, Mexican American, Chicano
Not Spanish/Hispanic/Latino	▲	▼	Other Spanish/Hispanic/Latino
Puerto Rican	▲	▼	

Consent Options Consent Expires Upon Selected Options

Admission	<input type="radio"/>	Discharge	
Client Diagnosis	<input type="radio"/>	# of Days	<input type="text"/>
Client Information/Summary			
Client Needs Matching			

## SMART Basic Navigation

### Conventions

1. **Required Fields:** required fields will be indicated by a yellow background. Dark yellow fields are system required fields and the record cannot be saved if a dark yellow field is incomplete.
2. **Reporting:** if a field is not required data for integrity, but is required to support reporting requirements for the state or agency, the background is pale yellow. **Note:** If any record with a pale yellow field is incomplete, then the entire ADAA admission or discharge record will be incomplete. Incomplete records will not be submitted to ADAA through the monthly reconciliation process.

**Note:** Exception to the Rule - when documenting the ASI, all fields must be complete, whether they are white or yellow.

3. **Incomplete Required Fields:** incomplete required fields will generate a warning error, and will be indicated by a peach background when the user tries to save the record.

SMART

User: Snavely, Kathleen  
Loc: Middle Earth Tx Clinic (Training), Gandalf Lane  
Client: Finch, Jeremy | M110355555FI | Case #: 1

Print Report Print View

### Client Profile for Finch, Jeremy

First Name	Jeremy	Agency Client ID	
Middle Name		Client ID	M110355555FI
Last Name	Finch	Record Created By	Snavely, Kathleen
Mother's Maiden Name		Last Updated By	Snavely, Kathleen
Gender	Male	Created Date	10/30/2007 9:12 AM
DOB	11/3/1955	Last Updated Date	7/31/2009 11:08 AM
SSN	123-77-5559	Zip Code	
Driver's License		County	
Employment Status in the Last Six Months		Marital Status	
Has paper file	Yes		

Cancel Save Finish

SMART

User: Snavely, Kathleen  
Loc: Middle Earth Tx Clinic (Training), Gandalf Lane  
Client: Finch, Jeremy | M110355555FI | Case #: 1

Print Report Print View

### Client Profile for Finch, Jeremy

Required fields are missing.

First Name	Jeremy	Agency Client ID	
Middle Name		Client ID	M110355555FI
Last Name	Finch	Record Created By	Snavely, Kathleen
Mother's Maiden Name		Last Updated By	Snavely, Kathleen
Gender	Male	Created Date	10/30/2007 9:12 AM
DOB		Last Updated Date	7/31/2009 11:08 AM
SSN		Zip Code	
Driver's License		County	
Employment Status in the Last Six Months		Marital Status	
Has paper file	Yes		

Cancel Save Finish

## SMART Basic Navigation

### *Navigation Shortcuts*

1. **Tab Key (Keyboard):** moves the user from field to field.
2. **Control Key (Keyboard):** Holding down the control key while selecting multiple options in mover boxes allows the user to select and move more than one selection in a mover box.
3. **Shift Key (Keyboard):** Holding down the shift key while selecting options in a mover box will allow the user to choose multiple sequential options.
4. **Helpful Hints:** Moving your mouse over a field will generate a helpful hint box providing additional information about the data field.
5. **Sort:** a user can sort list items, such as those in the Activity List or Episode List by clicking on the category title. For example in the Activity List, if the user clicks on Date, the list will automatically sort the list of activities by date.