

SMART Tip Sheets

Basic Navigation

SMART Basic Navigation

Menus/Toolbars

Navigation Buttons/Table Actions/Hyperlinks

Controls

Conventions

This set of tip sheets focuses on the elements required for navigation and data entry.

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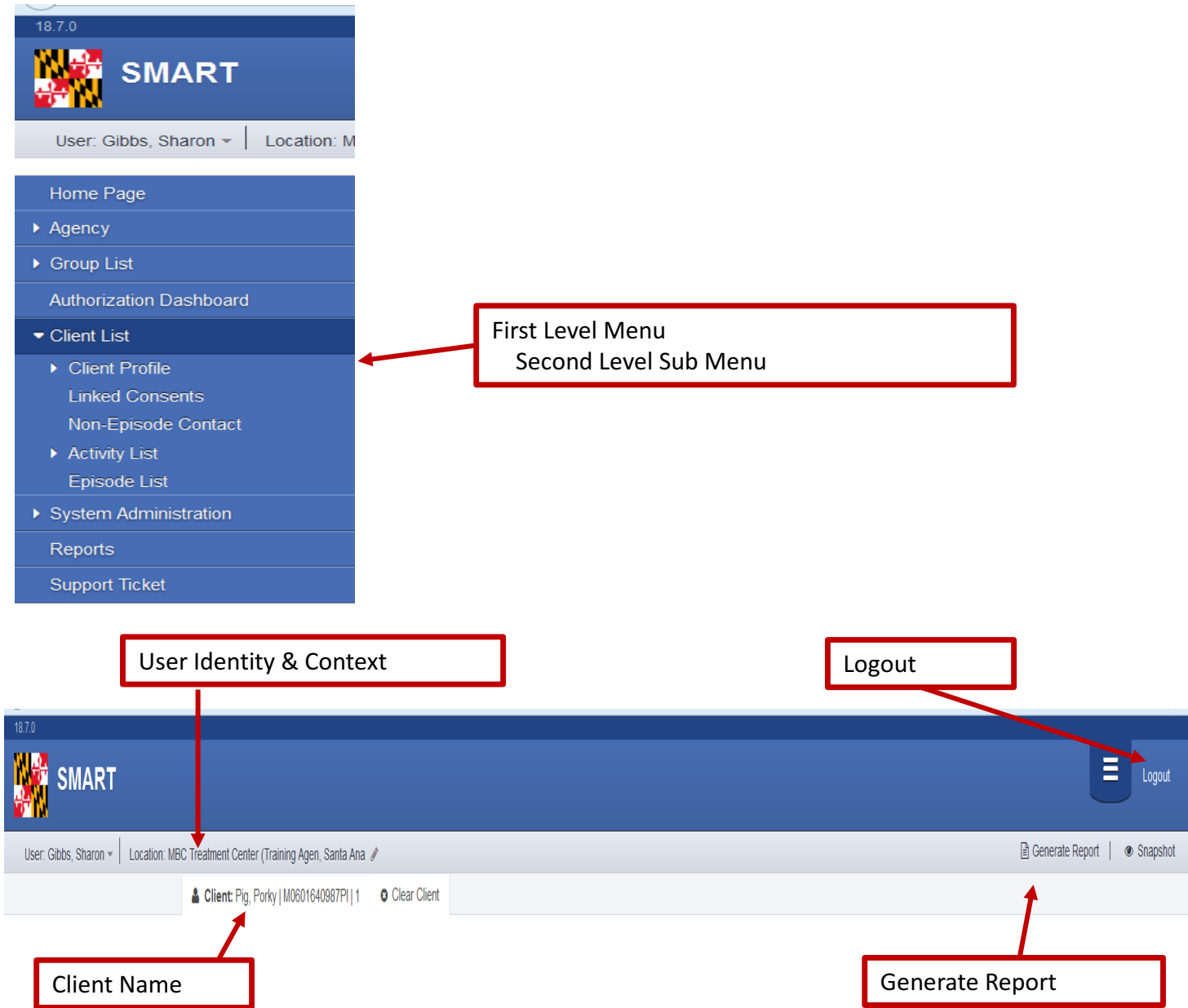
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SMART Basic Navigation

Menus/Toolbars

1. Menus: The SMART Main Menu tree appears on the far left column of the screen. The first level menu items are left-most aligned and may include: Home, Agency, among others (depending on the user's level of access).
2. Sub-Menus: Once the user has selected a First Level function, using the First Level Menu selection (i.e., Client List), 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. The 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, place your mouse over the item and single click the item.
3. Toolbar Icons:
 - The User Identity and Context Identify the User (individual logged into SMART), the Locations (Agency/Facility the user is logged into), and the client/participant's record opened to be worked on.
 - The Generate Report icon allows the user to print a formatted record of the module being used.
 - **Logout** allows the user to log out of the application.



SMART Basic Navigation

Navigation Buttons/Table Actions

1. Navigation Buttons: The **Go** button is used to initiate a query (i.e., Clicking **Go** from the Client List screen will generate a list of clients at the agency).
 - **Cancel**, **Save**, **Finish**, **◀** **▶** allows the user to move through a SMART module (i.e. Client Profile), 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; the left arrow takes you to the previous screen; and the right arrow advances you to the next screen in the module.
2. Table Actions & Hyperlinks: Table actions allows the user to create, edit or delete information.

Client: Pig, Porky | M0601640987PI | 1 [Clear Client](#)

The filter you created has been applied to the client list.

Client Search

Agency		Facility	
First Name		Last Name	pig
SSN		DOB	
SMART Client Id			
Unique Client Number		Agency Client ID	
Treatment Staff		Primary Care Staff	
Case Status	All Clients	Case Assigned To	
Other Number		Number Type	
Include Only Active Consents	Yes		

Navigation Buttons: **Cancel** **Save** **Finish** **◀** **▶** **Clear** **Go**

Client Profile: Adele, Adigun

Profile | **Activity List** | **Linked Consents**

Client Search

Agency	WDC Training Agency	Facility	
First Name		Last Name	
SSN		DOB	
SMART QA Client Id			
Unique Client Number		Agency Client ID	
Treatment Staff		Primary Care Staff	
Case Status	Clients with Open Cases	Case Assigned To	
Other Number		Number Type	
Include Only Active Consents	Yes		

Client List (Export) **Add Client**

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	F0101306972AD	Adele, Adigun	1/1/1930	569-58-6972	Female

SMART Basic Navigation

Controls

1. Textbox: Text boxes are designed to allow the user to manually enter data into SMART. Some text fields have specific formats which must be used for example.
 - DOB/Date of birth- mm/dd/yyyy
 - SSN: 345-78-0987
 - Phone Number: 301-405-4870
2. Scrolling Textbox: Scrolling textboxes are used to capture notes, comments, and descriptions. A scrolling textbox allows the user to enter at least 500 characters. Some boxes do not have any character limit.
3. Dropdown box: A drop-down box is used where more than one entry may be selected from a list of values. Some may scroll.
4. Mover Box: A mover box is used where more than one entry may be selected from a list of values. Some may scroll.

First Name	Porky
Middle Name	
Last Name	Pig
Mother's Maiden Name	
Suffix	
Gender	Male
DOB	06/01/1964
SSN	345-78-0987

Text box boxes allow you to manually enter information.

General Client Comments

Source of Referral

State's Attorney's Office

AIDS Administration

Alcohol/Drug Abuse Care Provider

Bail review

Commissioner's Office

DHMH (HG-507)

Drug Court

DSS Assessment Unit

DW/DUI Referral

Employer/Employee Assistance

Individual/Self Referral

The Mover Box has two arrows. The top arrow is used to move information from the left box to the right box after the selection has been made. The bottom arrow is used to move selected items from the left box to the right box.

Races		Selected Races
White		Other
Black or African-American		
Asian or Pacific Islander		
Alaskan Native		
American Indian		
Special Needs		Selected Special Needs
Major Difficulty in Ambulating or Nonambulation		Organically Based Problem
Moderate To Severe Medical Problems		TBI
Severe Hearing Loss or Deaf		
Visual Impairment or Blind		

SMART Basic Navigation

Conventions

- 1. System Fields: Dark yellow fields are system required fields and the record cannot be saved. The dark yellow fields must be completed in order to move from screen to screen.
- 2. Reporting Fields: A Light or pale yellow field represents data sets that are required to meet state and/or agency requirements.
- 3. Incomplete System Required Fields: Incomplete system (dark yellow) fields will generate a warning message, and will indicate which field is missing data by changing the field from dark yellow to peach.
- 4. Incomplete State/Agency Required Fields: Any information missing from a pale yellow field, will show up on the client/participant Activity List as 'In Progress' and on court reports as 'Missing Data'.

18.7.0

SMART

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

Client: Pig, Porky | M0601640987PI | 1

Required fields are missing.

Profile

First Name: Porky
Middle Name:
Last Name: Pig
Mother's Maiden Name:
Suffix:
Gender:
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 11:19 AM

Zip Code: 20742
County: Prince George's

Has paper file: Yes

Administrative Actions
Download c32

Cancel Save Finish

This message will appear if a system (dark yellow) required field is incomplete.

Dark yellow fields are system required fields.

Pale (light yellow) fields are additional fields required for state and/or agency reporting.

18.7.0

SMART

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

Client: Pig, Porky | M0601640987PI | 1

Client Activity List

Actions	Activity	Created Date	Status
	Client Information (Profile)	8/15/2007	In Progress (Details)
	Court Employment History	11/5/2007	Completed
	DENS ASI Assessment (Intake)	8/15/2007	Completed
	Intake Transaction	8/15/2007	In Progress (Details)
	Admission	8/27/2007	In Progress (Details)
	Client Program Enrollment (Level II.1)	8/15/2007	Completed
	Client Program Enrollment (Level II.1)	8/18/2007	Completed
	Court Criminal Justice	10/31/2007	Completed
	Consent (Wallstreet Recovery)	11/1/2007	Revoked

The incomplete status of pale (light) yellow fields will appear on the Client Activity List.

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 the mover boxes allows the user to select and move more than one option 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 additional information about the data collected for the field.
5. Sort: a user can sort list items, such as those on the Activity List or Episode List by clicking on the column header. For example if the user clicks on the Date column on the Activity List, it will sort the list of activities by date.