

SMART Tip Sheets Progress Reports

Progress Reports

Client Progress Report (Detailed)

Client Progress Summary Report

This set of tip sheets outlines the steps to run reports that will assist in monitoring a participant while enrolled in the problem solving court.

Total Pages: 6

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Revised: June 2018

Progress Reports

Detailed Client Progress Report

The Progress Report provides an overview of all the participant services and the outcome of each documented service for a specified period of time. It will also include client/participant consented services and outcomes from partner agencies using SMART.

1. **Entry Steps:** Login, Select Facility (if applicable), Client List, select client, Activity List.
2. Select **Progress** on the menu tree.
3. SMART requests the **Activity Date Range**. Enter the start date and the end date. Activities within this time period will appear on the Progress Report.
4. Select **On Screen** to generate the report. The report will be in a PDF format. Please turn off all pop-up blockers to avoid any issues in generating the report.
5. See sample report on the next page.

Actions	Activity	Activity Date	Created Date	Status
	Admission	8/15/2007	8/27/2007	Completed
	Client Program Enrollment (Level II.1)	8/15/2007	8/15/2007	Completed
	Client Program Enrollment (Level II.1)	8/18/2007	8/27/2007	Completed
	Court Criminal Justice	10/31/2007	11/5/2007	Completed
	Consent (Walstreet Recovery)	11/1/2007	3/31/2008	Revoked
	Court Sanction Incentive	11/1/2007	11/5/2007	In Progress (Details)
	Court Case Management	11/1/2007	11/5/2007	Completed
	Court Charge Received	11/1/2007	11/1/2007	Completed
	Court Admission	11/1/2007	11/5/2007	Completed
	Court Discharge	11/5/2007	11/5/2007	Completed
	Court Education History	11/5/2007	11/5/2007	Completed
	Miscellaneous Note Summary	3/31/2008	8/23/2007	Not Applicable
	Consent (Walstreet Recovery)	4/1/2008	5/13/2008	Revoked
	Consent (Walstreet Recovery)	4/2/2008	5/13/2008	Revoked
	Medication Summary	4/21/2008	4/17/2008	Completed
	Referral (Walstreet Recovery)	5/13/2008	5/13/2008	Completed
	DENG ASI Lite (Intake)	6/15/2008	7/16/2008	Completed
	Client Program Enrollment (Level I)	8/25/2008	10/23/2008	Completed
	Treatment Plan (Treatment)	2/10/2009	2/10/2009	Inactive - Old Version
	Judicial Continuing Care	3/3/2009	3/3/2009	Completed

Home Page

Agency

Group List

Drug Testing Check In

Authorization Dashboard

Client List

Client Profile

Client Progress Report

Activity Date Range

From: 05/02/2016

To: 09/15/2016

On Screen

Cancel

Enter desired date range here.

Client Information

Court Case #	77793111	Employment Status	
Unique Client #	M0601640987PI	Name of Employer	
Client Name	Pig, Porky	Highest Grade	
Alias	Porky Frank,Sweet Sour	Date of Birth	6/1/1964
Address	9658 Baltimore Avenue, 205 College Park, MD 20723	Age	52
School/Vocational Training Enrollment	Apprenticeship Program	Drug Court Admission Date	05/02/2016
Community Service Hours Remaining	100		
Days Since Last Positive Test	38	Date of Last Positive Drug Test	08/08/2016
Current Phase	Phase I	Number of Days in Phase	98
		Phase Start Date	06/09/2016

School/Vocational Training Enrollment	Apprenticeship Program	Drug Court Admission Date	05/02/2016
Community Service Hours Remaining	100		
Days Since Last Positive Test	38	Date of Last Positive Drug Test	08/08/2016
Current Phase	Phase I	Number of Days in Phase	98
		Phase Start Date	06/09/2016

Treatment Attendance

Start Date	Outcome	Procedure Description	Staff	Agency
5/12/2016	Attended	GROUP COUNSELING BY A CLINICIAN, Alcohol & Drug Services	Gibbs, Sharon	MBC Treatment Center (Training Agen
5/4/2016	Attended	INDIVIDUAL COUNSELING	Gibbs, Sharon	MBC Treatment Center (Training Agen
5/4/2016	FTA or no meeting	Drug Testing	Gibbs, Sharon	MBC Treatment Center (Training Agen

Treatment Attendance

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5/4/2016	FTA or no meeting	Drug Testing	Gibbs, Sharon	MBC Treatment Center (Training Agen

Drug Test Results

Date	Agency	Positive Conf	Positive Unconf	Positive Excuse	Negative	Unknown	Outcome	Comments
08/08/2016	WDC Training Agency	Alcohol, Cocaine, Heroin, Marijuana, PCP			Barbiturates, Other Opiates, Oxycodone		Specimen Collected	
08/02/2016	WDC Training Agency				Creat		Specimen Collected	document comments here
08/01/2016	WDC Training Agency						Failed To Appear	
07/20/2016	WDC Training Agency	Barbiturates, Heroin, Marijuana, PCP			Alcohol, Cocaine		Specimen Diluted	
07/15/2016	WDC Training Agency						Failed To Appear	
07/14/2016	WDC Training Agency						Failed To Appear	
07/11/2016	WDC Training Agency						Failed To Appear	
07/10/2016	WDC Training Agency						Excused Absence	

Drug Test Results

Date	Agency	Positive Conf	Positive Unconf	Positive Excuse	Negative	Unknown	Outcome	Comments
08/08/2016	WDC Training Agency	Alcohol, Cocaine, Heroin, Marijuana, PCP			Barbiturates, Other Opiates, Oxycodone		Specimen Collected	
08/02/2016	WDC Training Agency				Creat		Specimen Collected	document comments here
08/01/2016	WDC Training Agency						Failed To Appear	
07/20/2016	WDC Training Agency	Barbiturates, Heroin, Marijuana, PCP			Alcohol, Cocaine		Specimen Diluted	
07/15/2016	WDC Training Agency						Failed To Appear	
07/14/2016	WDC Training Agency						Failed To Appear	
07/11/2016	WDC Training Agency						Failed To Appear	
07/10/2016	WDC Training Agency						Excused Absence	

Requested By Gibbs, Sharon, Irvine 1 of 4 Confidential and Proprietary

Criteria: Client Name = Carroll SMART // Agency Name = WDC Training Agency // Date Range = 5/2/2016:9/15/2016

Requested By Gibbs, Sharon, Irvine 1 of 4 Confidential and Proprietary

Criteria: Client Name = Carroll SMART // Agency Name = WDC Training Agency // Date Range = 5/2/2016:9/15/2016

Case Management Contacts

<u>Event Date</u>	<u>Outcome</u>	<u>Event Type</u>	<u>Event Description</u>	<u>Staff</u>	<u>Agency</u>
					Agency
6/8/2016	Attended	Services	Substance abuse treatment services	Gibbs, Sharon	WDC Training Agency
6/7/2016	Unknown	Referral to Services	Substance abuse treatment services	Gibbs, Sharon	WDC Training Agency
6/6/2016	Attended	Case Management Activities	Case Management Planning	Gibbs, Sharon	WDC Training Agency
6/2/2016	Attended	Case Management Activities	Case Management Planning	Gibbs, Sharon	WDC Training Agency
5/13/2016	Attended	Services	Substance abuse treatment services	Gibbs, Sharon	WDC Training Agency
5/12/2016		Case Management Activities	Case Management Review	02, Training	WDC Training Agency
5/12/2016		Case Management Activities	Case Management Planning	Gibbs, Sharon	WDC Training Agency
5/10/2016	Attended	Services	Substance abuse treatment services	Gibbs, Sharon	WDC Training Agency
5/9/2016		Case Management Activities	Case Management Review	Gibbs, Sharon	WDC Training Agency
5/5/2016	Attended	Case Management Activities	Case Management Planning	02, Training	WDC Training Agency
5/2/2016		Case Management Activities	Case Management Planning	Gibbs, Sharon	WDC Training Agency
5/2/2016	Attended	Referral to Services	Substance abuse treatment services	Gibbs, Sharon	WDC Training Agency

Sanctions and Incentives

<u>Behavior Type</u>	<u>Behavior Date</u>	<u>Behavior</u>	<u>Response Date</u>	<u>Response</u>	<u>Agency</u>
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Requested By Gibbs, Sharon, Irvine

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Confidential and Proprietary

Sanctions and Incentives

<u>Behavior Type</u>	<u>Behavior Date</u>	<u>Behavior</u>	<u>Response Date</u>	<u>Response</u>	<u>Agency</u>
Negative	8/2/2016	FTA for Drug Testing	8/2/2016	Increase Frequency of SA Treatment Attendance	WDC Training Agency
Positive	6/29/2016	Negative Urine	6/29/2016	"Offender of the Month" Award Reduce Urine Testing	WDC Training Agency
Negative	6/9/2016	FTA for Drug Testing	6/29/2016	Increase Frequency of SA Treatment Attendance	WDC Training Agency
Negative	5/17/2016	Failure To Provide Specimen For Testing	5/19/2016	Increase Urine Testing	WDC Training Agency
Negative	5/17/2016	FTA for Court	5/27/2016	Community Service	WDC Training Agency
Positive	5/6/2016	Negative Urine	5/11/2016		WDC Training Agency

Drug Court Summary Notes

Notes

Provides a summation of what transpired. (Appended 5/20/2016 12:55:17 PM training02 [02, Training] WDC Training Agency)

Progress Reports

Client Progress Summary Report

The Summary Client Progress Report provides a synopsis of all the participant services and the outcome of each documented service for a specified period of time. It will also include client/participant consented services and outcomes from partner agencies using SMART.

1. Entry Steps: Login, Select Facility (if applicable), Client List, select client, Activity List.
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Click here to open the Client Progress Summary

Home Page

Agency

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Drug Testing Check In

Authorization Dashboard

Client List

Client Profile

Linked Consents

Client Progress Summary Report

Activity Date Range From 05/02/2016 To 09/15/2016

On Screen Cancel

Enter desired date range here.

Client Progress Summary

Report Generated 09/15/2016

Report Dates: 05/02/2016 to 09/15/2016

Court Case #	77793111	Employment Status	
Unique Client #	M0601640987PI	Name of Employer	
Client Name	Pig, Porky	Highest Grade Completed	
Alias	Porky Frank, Sweet Sour	Date of Birth	6/1/1964
Address	9658 Baltimore Avenue, 205 College Park, MD 20723	Age	52
School/Vocational Training Enrollment	Apprenticeship Program	Drug Court Admission Date	05/02/2016
Community Service Hours Remaining	100	Current Phase	Phase I
Phase Start Date	06/09/2016	Number of Days in Phase	98
Date of Last Positive Drug Test	8/8/2016	Days Since Last Positive Test	38

Drug Test Results

Agency	Total # Specimens			# Positive Specimens (confirmed positives and unconfirmed)	Positives
	# FTA	# Negative			
MBC Treatment Center (Training Agen	2	1	0	1	Alcohol, Cocaine, Heroin
WDC Training Agency	15	5	1	7	Alcohol, Amphetamines, Barbiturates, Benzodiazepine, Cocaine, Heroin, Marijuana, PCP

Treatment Attendance

Agency	# Individual Sessions	# Group Sessions	# FTA
MBC Treatment Center (Training Agen	1	1	0

Probation Meetings

Agency	Total # Meetings	# Attended	# FTA

Drug Court Summary Notes

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