

SMART Tip Sheets Intake

Intake

New Episode
Close Case

This tip sheet focuses on the elements required for starting a new episode of care (Intake).

Total Pages: 3

IGSR Technical Support: 301.405.4870

Updated: April 2013

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New Episode

Entry Steps: Login, select Facility, Client List, select client, Episode List.

Note: Some agencies will be required to complete a Client Group Enrollment prior to opening a case/Intake in SMART.

1. An Intake is the beginning of a new episode of care at a facility and is required before any other clinical activities can be recorded.
2. An Intake can only be completed if the client has no existing, active Intake record at the same facility or once all previous cases at the same facility have been closed. When you click **Activity List** or **Episode List**, you will receive a message "Please select a case, or click Start new Episode."
3. To open a case, click **Start New Episode**. This will open the Client Intake screen. Complete all required fields and click **Save** or **Finish**.

Closing a Case

4. When a client is Discharged, users must remember that the case must also be closed on the Intake screen. To close a case, enter the date closed and click **Save & Close the Case** as opposed to the **Save** or **Finish** button.

Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE	Actions
1	Open Active	OPSC	Train01, SMART	6/28/2011			Review

Intake Case Information for Gibbs, Rick

Intake Facility: OPSC | Case # 1

Case Assigned To: Train01, SMART | Case Status: Open Active

Initial Contact: | Initial Contact Date: |

Residence: Baltimore City | Intake Date: 6/28/2011

Source of Referral: | Pregnant: No | Due Date: |

Reason For Non-Admission: | Prenatal Treatment: |

Report To State: Yes | HIV Positive: |

Referral Contact: | Injection Drug User: |

Presenting Problem: Substance Abuse, Education/Literacy, Housing, Mental Health

Presenting Problem Selected: |

Special Initiative: ATR - Gaudenzia, ATR - Perry Point Veteran, ATR - Tuerk House, Consent to Participate in Research

Special Initiative Selected: |

Inter-Agency Service: | Inter-Agency Service Selected: |

Date Closed: | [Save & Close the Case](#)

[Cancel](#) [Save](#) [Finish](#)

Actions: [Move Intake](#) [Delete Intake](#)

Reviewing Existing Cases

5. **Reviewing Cases:** If the client has one or more cases at your facility (active or closed), click **Episode List** to view the list of cases and then click **Review** to open an existing case. SMART will then display the Activity List for that specific case only and allows you to review all transactions completed under that specific episode of care. Click **Review** to view or edit any transactions within that case's **Activity List**.

Episode List for Gibbs, Rick								Start New Episode
Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE	Actions	
1	Open Active	OPSC	Train01, SMART	6/28/2011			Review	

Client Activity List				
Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	6/28/2011	6/28/2011	In Progress (Details)	Review
Intake Transaction	6/28/2011	6/28/2011	In Progress (Details)	Review
ECourt Case Management	6/28/2011	6/28/2011	Completed	Review
ECourt Discharge	6/28/2011	6/28/2011	Completed	Review
Drug Test Result Summary	6/28/2011	6/28/2011	Not Applicable	Review
ECourt Admission	6/28/2011	6/28/2011	Completed	Review
ECourt Criminal Justice	6/28/2011	6/28/2011	Completed	Review