

Quicklinks and Favorites Tipsheet

This Tip Sheet will walk users through adding and removing Quicklinks and Favorites in SmartCare. This tip sheet may change as trainings and the system are updated. Please view [the EHR webpage](#) for the most up to date version. If any additional help is needed, you can contact the Sacramento County EHR Support Team at [916-876-5806](tel:916-876-5806) or bhs-ehrsupport@sacounty.gov.

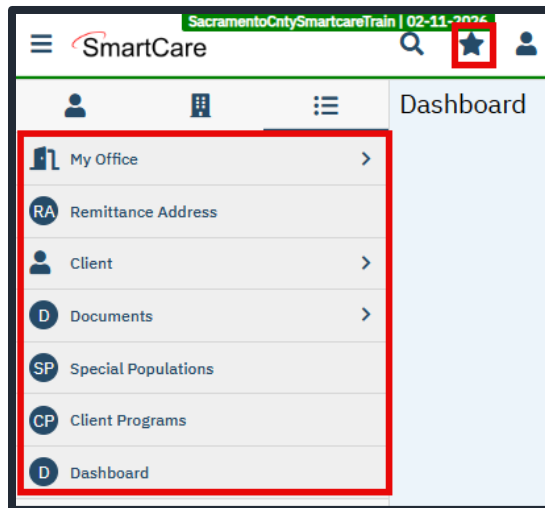
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What are Quicklinks & Favorites?

Quicklinks and Favorites are shortcuts used to access commonly used pages or screens within SmartCare. Most screens can be saved as a Quicklink or a Favorite, but there are some screens that cannot be saved as either.

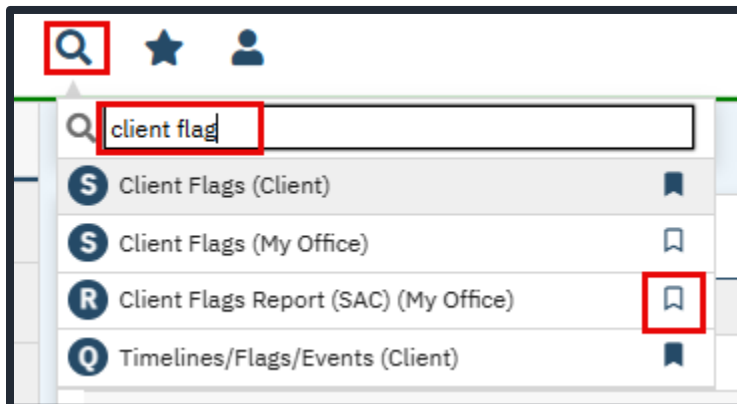
- **Quicklinks** are bookmarks saved in the left-hand navigation bar and are used as a shortcut to the screen; no filters can be saved with them.
- **Favorites** are shortcuts found under the star icon in the upper left navigation bar. Favorites can save filters to efficiently navigate commonly used screens.



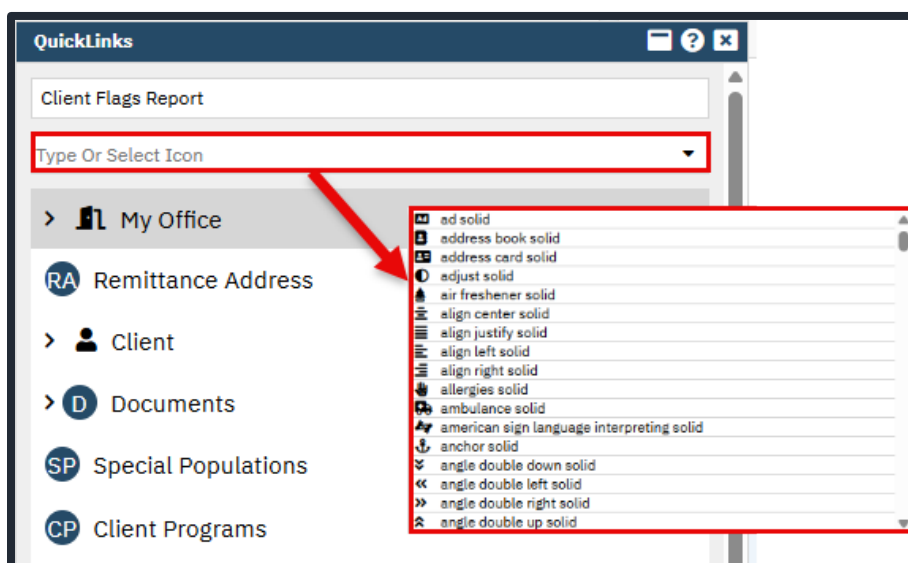
Quicklinks

How To Add A Quicklink

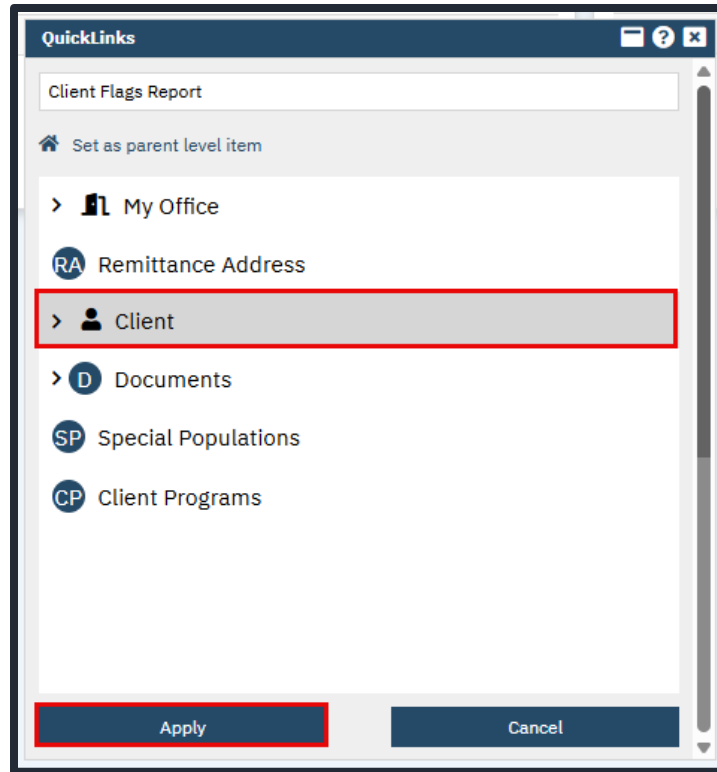
1. Click the Search Button.
2. Type & Hover over the screen you wish to save as a Quicklink, do not click.
3. Click the bookmark icon to the right of the screen you wish to save as a Quicklink.



4. This opens the **Manage Quicklinks** pop up.
5. Optional: You can **select an icon** from the dropdown for your new Quicklink.



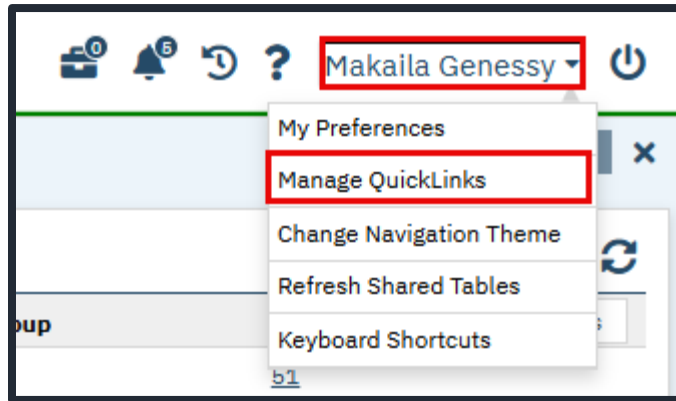
6. If you would like your Quicklink inside a folder, **select that folder** – otherwise the Quicklink will drop to the bottom of the list automatically.
7. Scroll to the bottom and **click Apply**.



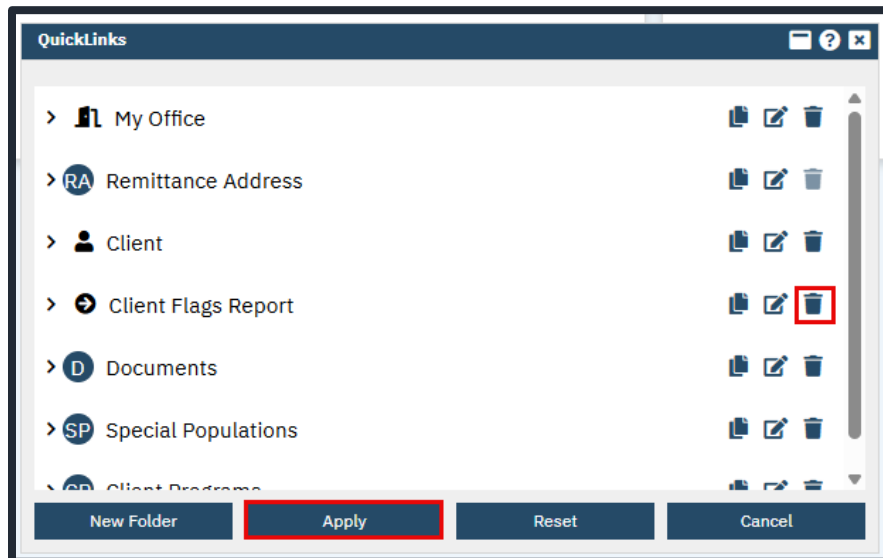
8. **Refresh screen** to see your newly saved Quicklink in the left-hand navigation bar.

How to Remove a Quicklink

1. In the upper right-hand corner of your SmartCare Screen **click on your name** to drop down a menu.
2. From the drop down, **select *Manage QuickLinks***.



3. Find the QuickLink you want to remove and **click on the Trash Icon** to delete the QuickLink.
4. To save your changes, you must **click Apply**.

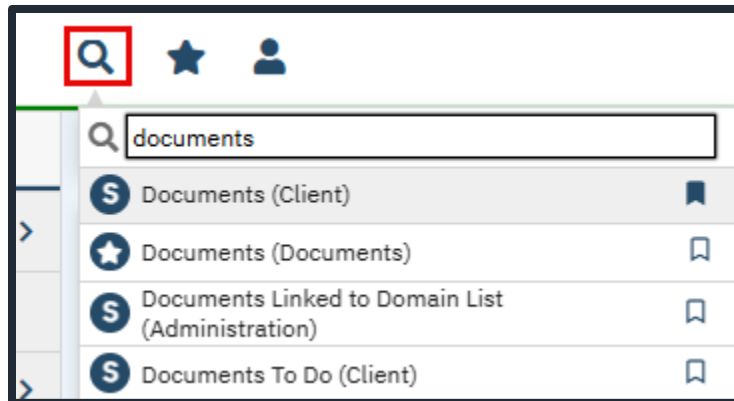


5. **Refresh screen** to see your Quicklink removed from the left-hand navigation bar.

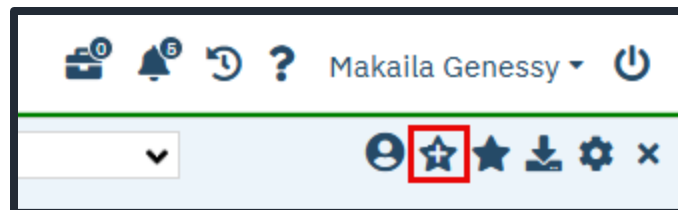
Favorites

How to Add a Favorite

1. Search for the screen you would like to add as your favorite.

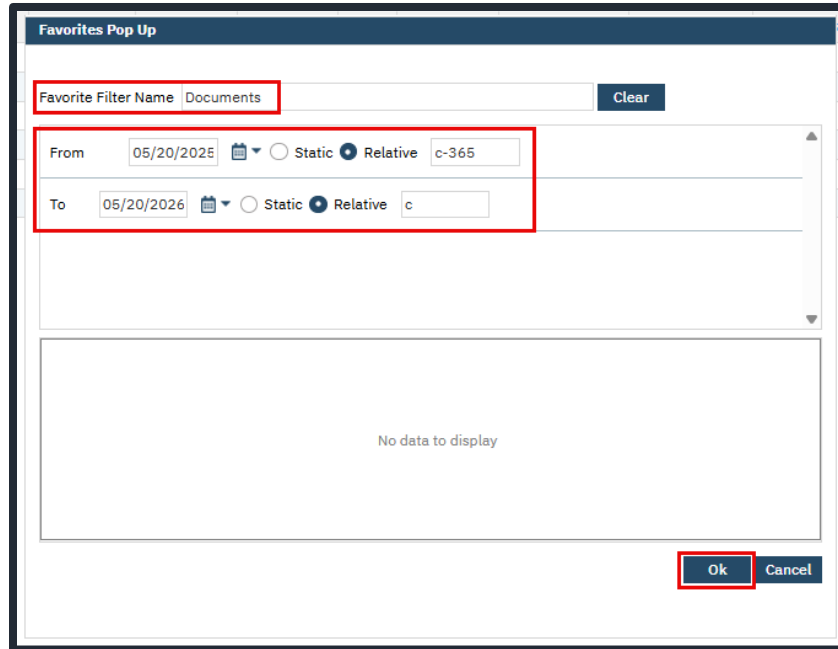


2. **Navigate** to that screen.
3. **Click on the Star with a plus sign icon**, if you hover over the icon, it states *New Favorite(s)*

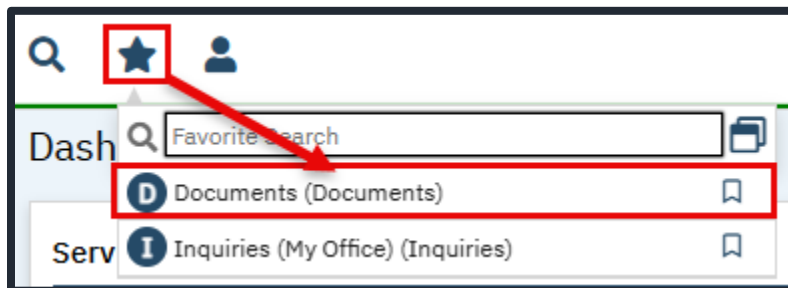


4. This will populate the Favorites Pop Up Box.
5. **Enter the name of the filter.** We recommend naming the filter the name of the screen as listed in SmartCare.
 - a. Only you can see this filter; it is user specific.
 - b. When searching for filters the screen name will automatically be included in parentheses.
6. If date is present, **select the Static or Relative radio button.**
 - a. These options are only available when filters include a date field(s).
 - b. Static means the date field will always present the date that entered.
 - i. For example, if January 1, 2023 is the start date and January 31, 2023 is the end date, every time this Favorite filter is used these dates populate.
 - c. Relative allows the date to fluctuate based on how it is set.
 - i. For example, if you want the filter to always show the last year, I would select the Relative radio button and enter "c-365" in the text field for *From* and "c" in the text field for *To*.

- ii. The date can be found by clicking on the calendar icon next to the From/To date boxes. Additional options are available by clicking More; a pop-up window will appear.
7. **Click the Ok button** to save the Favorite.

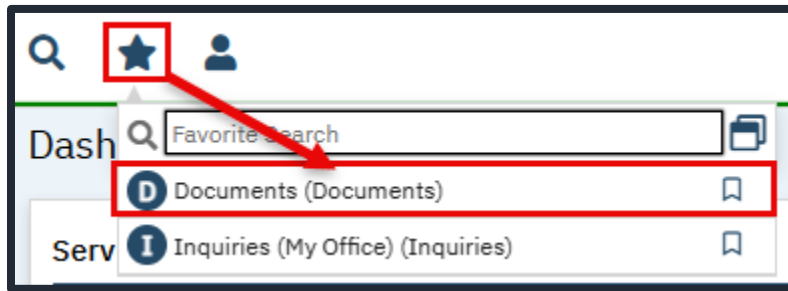


8. To use the favorite you just created, select the Star icon in the upper left-hand corner of SmartCare, this will dropdown as saved favorites.



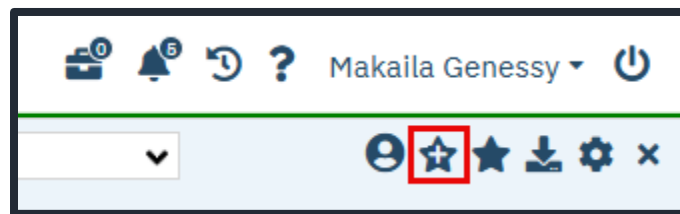
How to Remove a Favorite

1. Search for the screen you would like to remove from your favorites.

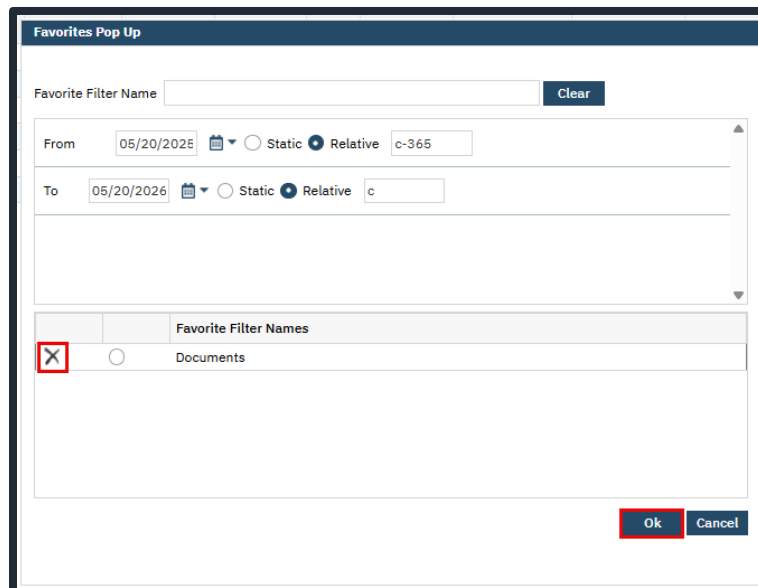


2. **Navigate** to that screen.

Click on the Star with a plus sign icon, if you hover over the icon, it states *New Favorite(s)*.



3. This will populate the Favorites Pop Up Box.
4. From the *Favorites Pop Up*, in the *Favorite Filter Names* section in the bottom box of the pop up **click the X** of the Favorite you would like to remove to remove it.



5. **Click Ok** to save.
6. **Refresh page** to see that the Favorite has been removed from the Star Icon Shortcut.
click to remove a favorite.