To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	September 25, 2024
Title	Summary of SmartCare Post Go-Live Updates

The SmartCare electronic health record (EHR) went live for both the mental health (MH) and substance use disorder (SUD) systems of care (SOC) on September 1, 2024. This information notice serves as a summary of recent guidance shared with the SOC related to SmartCare use. Please see also the slide deck from the September 19, 2024, Town Hall on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website.

HELP DESK AND SUPPORT

ISSUE REPORTING

Users should contact the CalMHSA help desk as the first step for all SmartCare issues and concerns. The SmartCare help desk is available Monday through Friday, 7:00am to 7:00pm. The preferred order of contact is connecting via live chat, followed by submitting a ticket, and finally a phone call. Outside of normal business hours, a phone line is available for system outages only. For more details please see the help desk flyer on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website.

The exception to reaching out directly to SmartCare is if an ARF must be submitted. **If you know you need to submit an Access Request Form (ARF) for access to SmartCare, complete the ARF form available on the Optum website and send it directly to MIS at BHS_EHRProject.HHSA@sdcounty.ca.gov.** If you have a question about access and are not sure if an ARF is needed, start by reaching out to the CalMHSA help desk.

The QIMatters.HHSA@sdcounty.ca.gov email address should be used now only for clinically related questions (as with CCBH and SanWITS).

RESOURCES FOR WORKFLOW AND DOCUMENTATION QUESTIONS

Numerous SmartCare resources are available to assist you with workflow and documentation questions. These include the CalMHSA Knowledge Base, access to help from directly within SmartCare, and San Diego specific resources on the Optum website. Please see the second page of the help desk flyer on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website for instructions to access resources.

> **For More Information:**
> - Check the SmartCare tab on the Optum website under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.
> - Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	September 25, 2024
Title	Summary of SmartCare Post Go-Live Updates

SMARTCARE ACCESS AND TRAINING

UPDATES REGARDING ACCESS

BHS recognizes that SmartCare system access has been a significant challenge and is taking steps to remediate. There have been problems with users having the correct role-based access. BHS is currently working through a process to review each role in detail to ensure the correct access to SmartCare for all users. Updates will be shared as they become available.

For current users who have not received an email with login information, there are several reasons to consider prior to submitting a ticket through CalMHSA for help:

- Check first to see whether instructions were sent to an alternate email address or are in a spam or junk folder;
- If the user did not have an active account in CCBH or SanWITS, they will not receive an email;
- If the user did not finish LMS training or the final steps to submit for completion, they will not receive an email; and
- If the LMS training account and SmartCare account cannot be matched, they will not receive an email.

If it known that an Access Request Form (ARF) is needed to secure access to SmartCare either for new users, modifications, etc., users should submit via the instructions on the ARF form. The turnaround time for processing ARFs is currently 7-10 days. BHS is working as quickly as possible to complete ARF request; please remain patient and do not submit multiple emails.

UPDATES REGARDING TRAINING

All new users must also complete all required trainings. For most roles, this is available through the CalMHSA LMS system. For residential, crisis residential, and crisis stabilization unit users, the live, in-person training is required for access to SmartCare. This is the exception to the required LMS trainings.

In addition, based on user request, **Optum has extended live, in-person role-based training through October 31.** New or existing staff can sign up for in-person training by registering through RegPack. For questions, contact sdu_sdtraining@optum.com.

For More Information:
- Check the SmartCare tab on the Optum website under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.
- Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

To:	**BHS County-Operated Providers and BHS Contracted Service Providers**
From:	**Behavioral Health Services**
Date:	**September 25, 2024**
Title	**Summary of SmartCare Post Go-Live Updates**

SYSTEM UPDATES

REGULARLY SCHEDULED MAINTENANCE

Regularly scheduled SmartCare system maintenance will occur every Sunday at midnight into Monday morning. During this maintenance window, SmartCare will be unavailable for 4-6 hours. Programs are asked to use downtime procedures during this time. Users should note that if logging in at the end of the maintenance window, they may experience extreme slowness for a short period of time.

PASSWORD RESETS

SmartCare passwords must be reset every 90 days. Users will be prompted at the end of each 90-day period to update their password. Passwords must be at least 8 characters, include upper and lower-case letters, numbers, and a special character.

REQUIREMENTS AND FUNCTIONALITY

ENTRY OF SERVICES

Programs should NOT enter any services into CCBH or SanWITS for dates of service after 8/31/2024. Any services entered into CCBH or SanWITS with dates of service 9/1/2024 or later will need to be re-entered into SmartCare to avoid billing impacts.

NEED FOR CCBH CHART ACCESS:

As new clients are opened to programs in SmartCare, providers may need to view historic information in CCBH. Currently, most providers have access in CCBH to view information for clients who have been opened to the provider's program. If needed, the provider may open an assignment for the client in CCBH to view this documentation and then close it in CCBH when the client closes with them in SmartCare. There is no need to complete any sort of intake documentation for this provider or update any client information in CCBH, this path is solely for view only.

24-HOUR PROGRAMS (RESIDENTIAL & CSU) BED ASSIGNMENTS: **For ALL SUD & MH residential and Crisis Stabilization Units (CSU), when admitting a client to the bed board, the date of bed assignment MUST be 9/1/2024 due to system functionality.** The bed assignment is not the same as the program assignment date. We understand that the bed assignment date will not "show" the true enrollment date to your program on the bed board. The original assignment date will populate in the

---

For More Information:

- Check the SmartCare tab on the Optum website under [MHP Provider Documents](#) for the MH SOC or [DMC-ODS Provider Documents](#) for the SUD SOC.
- Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	September 25, 2024
Title	Summary of SmartCare Post Go-Live Updates

Program Assignments or Client Programs listings. If you entered a bed assignment date prior to 9/1/2024, it has been updated in the system to 9/1/2024. Anything entered prior to that date will cause billing issues.

DELETION AND ERROR CORRECTION PROCESS

In SmartCare, there are some errors providers can correct directly, and others that require correction by system administration. This process may look different than in CCBH or SanWITS. Errors that providers can correct directly include edits to note content, edits to some service details, updates to group participants or facilitators, and for most assessments and forms, marking in error by the user. Deletions or errors that require support from system administration include duplicate notes, documentation in the wrong client chart, and program assignment in error. Instructions are available on the CalMHSA Knowledge Base under clinical documentation.

CLIENT NAME OR DEMOGRAPHIC CHANGES FOR THE SUD SOC

Because SmartCare employs a shared client record across the system of care, the BHS Health Information Management Services (HIMS) department will be managing significant client record changes. **SOC staff are not to make changes to name, date of birth, social security number, and gender in SmartCare.** Any changes to these fields need to be submitted to the HIMS department. HIMS will also handle potential duplicate clients. Any changes to these fields need to be submitted to HIMS on form BHS-025 available on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website via HIMDEPT.HHSA@sdcounty.ca.gov or secure fax.

FILTERING CLIENTS BY PROGRAM

BHS has developed a tip sheet for users to permanently set a filter to remove extraneous information and show program administration, front desk, and reception staff a curated view of the clients at the program. Please review the Reception / Front Desk Screen tip sheet on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website to set the filters for program client screen views.

E-PRESCRIBING: CALMHSA RX

Prior to go-live, it was believed that integration existed between CalMHSA Rx and SmartCare; at go-live BHS learned this integration does not exist. To fix this issue, doctors and registered nurses were given direct access to CalMHSA Rx. Doctors currently have access to prescribe medications, and registered nurses currently

---

For More Information:
- Check the SmartCare tab on the Optum website under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.
- Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	September 25, 2024
Title	Summary of SmartCare Post Go-Live Updates

have access to stage medications. BHS is trying to provide access to LPHAs to view and to document existing medications; the details at this time are unknown and will be shared with the SOC as soon as possible.

UMDAP
As previously communicated, the SmartCare vendor encountered an issue during migration of existing UMDAP information from CCBH into SmartCare. The missing UMDAP information was migrated on 9/17/2024 and this issue is resolved.

AUTHORIZATIONS
CalMHSA is working to allow authorization requests and approvals to be completely maintained in SmartCare; this was not available at go-live. The current processes for mental health will remain via the County's Prior Authorization request forms or the Optum submission process. SUD residential providers will continue to request authorizations via Optum forms and/or current process; Optum will enter approved authorizations into SmartCare. Guidance was shared and is available on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website.

UPDATES TO TADT DOCUMENTS
The Access to Services Journal (ASJ) is now called Timely Access Data Tool (TADT) in SmartCare. TADT documents are undergoing minor changes to address recent updates in the July 2024 TADT workbooks. They have been deployed to production environments. Specific updates include:
- DMC-ODS documents now have "urgent" and "prior auth required" fields, including related "time" fields * logic to address requirements.
- All documents now require entry for "referred to out-of-network provider" regardless of timeliness of access, per DHCS feedback.

NEW ROI DEPLOYED TO PRODUCTION
CalMHSA finished testing the new Release of Information (ROI) and deployed it to production environments on September 9. Additional information can be found on the CalMHSA website.

For More Information:
- Check the SmartCare tab on the Optum website under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.
- Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	September 25, 2024
Title	Summary of SmartCare Post Go-Live Updates

ADDITIONAL INFORMATION

SITE LEADS
Site leads met twice per day during go-live week for briefings, and three times for briefings last week. While the site lead briefings have now ceased, other mechanisms are in place for ongoing discussion and escalation. This includes a survey sent to the site leads to capture feedback, and a project closeout meeting and 30-day review in October.

SMARTCARE ADVISORY GROUP
Advisory Group meetings will continue through October to communicate issues, discuss questions about policy changes, and explore post-go live considerations or issues. QA representatives from both mental health and substance use disorder will participate going forward to ensure alignment on policy and procedure and to share any concerns on behalf of the SOC. The purpose of these meetings is to share information, collaborate with decision-making representatives from the system of care, and facilitate alignment under one BHS system of care.

KEY UPCOMING DATES
Town Hall
- **October 8, 2024 at 10:00 am** | Join via this link

For More Information:
- Check the SmartCare tab on the Optum website under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.
- Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov