

Final SmartCare Town Hall: Shifting from Implementation to Operations



December 17, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



Implementation to Operations

Agenda

- Transition from Implementation to Operations
- Issue Reporting and Communication
- SmartCare Training
- Final Updates: SmartCare EHR Project Status
- Future Development
- Q&A – Focus on Transition to Operations



Reflections & Lessons Learned

Takeaways for future projects

- Largest SmartCare implementation in California – and the only implementation across such a large and diverse network of contracted providers.
- First time the Mental Health and Substance Use Disorder Systems of Care worked together on a project implementation.
- Advisory Group model and process provided deep value to the implementation process and will be replicated for future projects.



SmartCare Advisory Group

Purpose, Goals, and Next Steps

- Purpose: Share information, collaborate with decision making representatives from the SOC, and operate under a single SOC.
- Goal: Seek operational and clinical feedback to set up SmartCare.
- The SmartCare Advisory Group will no longer meet in the new year.
- BHS will be convening separate meetings as to outstanding reports, access, and billing items—specifics coming soon.
- As new components of SmartCare are implemented (e.g., the patient portal), the Advisory Group will be reconvened.





Issue Reporting & Communication

Inquiry Routes, Communication Reorganization



Issue Reporting & Questions

Inquiry Routes for SmartCare issues and questions

Issue or Need	Resource
System issues: i.e. glitches, functionality issues, pop up errors	Follow the CalMHSA help desk communication process (see help desk flyer)
SmartCare ARF submission + access	BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
Support questions that can't be addressed by the CalMHSA Help Desk	BHS_EHRSupport.HHSA@sdcounty.ca.gov
Documentation, guidelines, policy questions	QIMatters.HHSA@sdcounty.ca.
Escalation of CalMHSA help desk issues either resolved prematurely or not resolved	Route to MIS to provide to CalMHSA as an escalation point: BHS_EHRSupport.HHSA@sdcounty.ca.gov
Billing-related inquiries	MH Clients: MHBillingUnit.HHSA@sdcounty.ca.gov or 619-338-2612 SUD Clients: ADSBillingUnit.HHSA@sdcounty.ca.gov or 619-338-2584

Help Desk

Ongoing Support

- Help desk hours available Monday - Friday (7:00am – 7:00pm)
- Preferred order of contact: Chat → Ticket → Phone Call
- Outside normal business hours, call for system outage issues only

SmartCare Help Desk Support



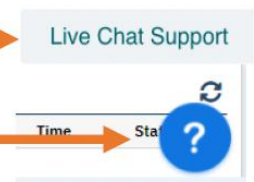
Beginning September 7, 2024, SmartCare support for system issues is offered by CalMHSA during normal business hours (in order of preferred contact):

Monday – Friday, 7:00am – 7:00pm

1. Connect via Live Chat

Live Chat can be accessed in one of three ways:

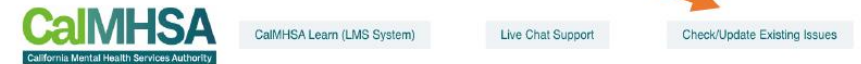
- Go to 2023.calmhsa.org and click on “Live Chat Support” at the top of the screen
- Click on the blue question mark on the bottom right corner of the screen when logged in to SmartCare
- Use this URL:
https://crbeta.Buchanan.com/teamsccmes_senger/calmhsa.html



2. Submit a Ticket

A ticket can be created in one of two ways:

- Emailing calmhsa.sandiego@Buchanan-mail.onbmc.com
- Submitting a ticket via 2023.calmhsa.org



3. Call (833) 686-6801

- Available during normal business hours

Note: After normal business hours, the only support available is for system outages. Call (916) 214-8348

Resources

Ongoing Support

- CalMHSA Knowledge Base is available at 2023.calmhsa.org
- Access help from within SmartCare
- Access San Diego specific resources via MHP Provider Documents and DMC-ODS pages of Optum website

SmartCare Resources



Numerous SmartCare resources are available to assist you with workflow and documentation questions:

1. Go to the CalMHSA Knowledge Base

Visit the links on the CalMHSA website at 2023.calmhsa.org to explore SmartCare EHR documentation and support tools organized by role:

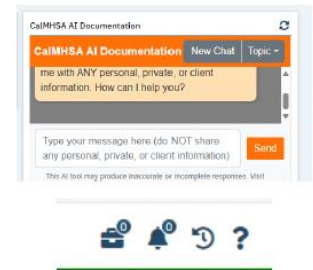
- Use the **search box** on the bottom of the navigation links to search the entire CalMHSA library, or
- Use **Ctrl + F** on your keyboard to search for key words within the **Documentation** sections.



2. Access help from within SmartCare

Once you are logged in to SmartCare, you can access help in the following ways:

- Use the CalMHSA **AI Documentation chatbot** to ask direct questions about workflow and documentation, or
- Click on the **black question mark** at the bottom of your screen to find "how to" documents on the CalMHSA website.



3. Access San Diego Specific Resources

For resources and guidance specific to San Diego County's use of SmartCare, go to either the [MHP Provider Documents](#) or [Drug Medi-Cal Organized Delivery System](#) pages of the **Optum website** and click on the **SmartCare** tab.



Optum Website Reorganization

SmartCare Tab Changes for MHP Provider Documents & DMC-ODS Pages

- The SmartCare tab will be reorganized for ease of accessing information.
 - New, more specific categories
 - Update file names & descriptions
 - Remove duplicate/old files
 - Indicate new/revised files
 - Indicate if resource is MH or SUD specific
 - Current FAQs will remain, but no new FAQs will be added or updated
- Timeline: In process; target completion by end of January



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Optum Website Reorganization

New Categories

- SmartCare Resources: Start Here
- Access
- Administrative Processes
- Billing Information
- CSU, Residential, Crisis Residential Specific Workflows and Documentation
- Workflows and Documentation
- Prescribers
- Data and Reporting
- Hardware, Software, Network, Scanning
- Training
- Info Notices
- Town Hall PowerPoints



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Ongoing Communication

For new resources, requirements, information

- New resources, requirements, and information will be clearly communicated via email and topic specific
 - Important information will be communicated independently via email
 - The topic will be included in the subject line of the email for clarity
- The UTTM will be utilized for summaries or reminders
- Ongoing touchpoints will occur through QIP meetings
- BHS will convene recurring meetings to communicate important SmartCare info and to seek input on specific areas of functionality as needed — specifics coming soon
- For new SmartCare related implementations, an Advisory Group will be reconvened to seek SOC input and advisement.



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SmartCare Training

Updates and Details



Training Update

Ongoing CalMHSA and Optum Trainings

- CalMHSA training will continue; the required training grid will be updated and posted to the SmartCare tab
- CalMHSA continues to update the EHR Knowledge Base website with new “how to” documents
- Optum has technical support hours scheduled through mid-January and will continue to offer through 2025 based on need



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Training Update

New SmartCare Training Option for 24-hour programs

- Optum has developed an asynchronous, self-paced training option for CSU and Residential / Crisis Residential program staff
- Video tutorials can be accessed at the bottom of the SmartCare Training page on the Optum website
- Program staff watch videos that pertain to their role, and take a quiz
- Once 80% or higher is achieved, SmartCare access is granted
- Classroom and live virtual training options remain for those who prefer a live instructor; Enrollment continues through RegPack





Final Updates: SmartCare EHR Project Status

ARF, Escalating Tickets, Reports, Billing, MFA, CalMHSA Rx



SmartCare Access & ARF Processing

MIS Updates and Information

- ARF processing continues to be 7-10 days
- BHS continues to reallocate resources to improve timely response
- Reminders:
 - The ARF Form can be found on the Optum SmartCare training page
 - Send completed ARF's to:
BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov



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Delays in Processing ARFs and Help Desk Tickets

MIS Updates and Information

- There are several practices that can create delays in processing ARFs
 - Errors on ARF Forms
 - Incomplete forms or missing fields or user roles
 - Handwritten forms
 - Full program name
 - Incorrect taxonomy number
 - Sending multiple emails to MIS for ARF updates or completion
- There are several practices that can create delays in ticket resolution:
 - CC'ing MIS when opening a ticket with CalMHSA
 - Forwarding emails immediately upon sending to CalMHSA



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Process for Escalating Tickets

MIS Updates and Information

- BHS is working with CalMHSA to improve the help desk experience.
- Criteria for escalation of a ticket submitted to the CalMHSA help desk:
 - You have received a response from CalMHSA that a ticket is resolved that has not actually been resolved
 - You submitted a ticket and have not received a response after one week
- Process for escalation of a ticket that meets this criteria:
 - Forward the email that includes the ticket number to MIS Support
 - Indicate in the forwarded email which of the criteria above has been met



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Reports Updates

MIS Updates and Information

- BHS has an internal Reports Committee to prioritize report creation, determine gaps in the system, and advise on needed reports
- Five new reports are anticipated by the end of January:
 - ADC Report (admissions, discharges, census)
 - Admissions Morning Report
 - Client Services Report
 - TADT Timeliness Report
 - Active Clients Report with Last Date of Service



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Billing Updates

Billing functionality and Instructions

- Some billing functionalities have not yet been turned on in SmartCare
- BHS is working with CalMHSA to turn on billing as quickly as possible
- We do not yet have a date yet but plan to have a date soon
- We will communicate this date to you in advance and provide programs with instructions on how to identify and correct service errors
- We also understand that the SOC will have feedback and questions on service errors and billing. BHS is planning to set up time with the SOC for input and next steps.
- Instructions for invoicing BHS were sent to the SOC on Thursday 9/26/2024



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Multi-Factor Authentication (MFA)

Details and Timeline

- **Multi-factor authentication (MFA) will be relaunched Tuesday 12/17/2024**
- MFA is used to ensure the best possible security of client data and will be required every 24 hours to access SmartCare
- After entering user ID and password, users will receive an email with a one-time code to be entered before gaining access into the system.
- Users will need to enter security questions - answers are not case sensitive and autofill will populate incorrect answers for security questions
- The change will not impact users who login via Akamai with a San Diego County email address.



Multi-Factor Authentication (MFA)

Re-launch reminders

- Email is the default method to receive the MFA code needed for access.
- Please ensure the correct email is entered in SmartCare contact section on the "My Preferences" screen.
- For those who use multiple email accounts, a primary email address must be selected for SmartCare use.
- If an email notification is not received, please check spam/junk folder.
- For optional text message (SMS notification) set up, please reference prior communication
- Contact the CaMHSA Help Desk with questions or access issues - Chat is the fastest way to resolve MFA questions.



CaMHSA Rx: LVN, LPT, LPHA

NEED

- Access to review current medications
- Access to enter home medications

ACCESS

- **Current:** Only RN's & Prescribers
- **In progress:** Phase 1 LVNs, LPTs, & LPHAs
- **Planned (Jan 2025):** Phase 2 LVNs, LPTs, & LPHAs

TRAINING

- Start reviewing CaMHSA Rx training documentation



Sneak Peak: Future Development



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Future Development

Upcoming SmartCare Projects for Implementation

- Patient Portal
- Interoperability
- Residential EMAR
- Archiving



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THANK YOU!!

Q&A

