

# SUD System of Care SmartCare Implementation Town Hall

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April 29, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



# Meeting Goals



Transparency



Engagement



Inclusion



Preparation



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# Meeting Agenda

- **A Quick Recap**
- **Backing Up... What is an EHR?**
- **Current Project Status**
- **CaIMHSA's SmartCare website**
- **SmartCare Reports**
- **SOC Impacts & Actions**
- **SOC Resources**
- **Q&A**



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# A Quick Recap

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SmartCare for the SUD SOC



# Quick Recap

## SmartCare for the SUD SOC

- SmartCare will be implemented as the SUD SOC electronic health record (EHR), replacing SanWITS.
- SmartCare was designed specifically for California behavioral health systems and is being implemented in more than 25 counties as part of a semi-statewide EHR project to meet our complex business needs.
- SmartCare meets 42 CFR Part 2 privacy requirements and includes a robust consent management tool which improves care coordination.



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# Quick Recap

## Transitioning from SanWITS

- When SmartCare goes live September 1, 2024, access to client records in SanWITS will still be available. BHS is evaluating how and where current and historical client records will be accessed.
- SanWITS training will end on or before July 17, 2024. Some SanWITS classes will not be available after late June, with registration closing earlier in the month.



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# Quick Recap

## SUD SOC Participation and Preparation

- Three primary support roles from the SUD SOC will participate in the SmartCare implementation: Superusers, Advisory Group Members, and Site Leads.
- Hardware, Software, and Network Requirements are available; SUD SOC leaders should be reviewing these requirements to ensure workstations have the appropriate set up.



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# Backing Up... What is an EHR?

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What will we get from SmartCare that is not available in SanWITS?



# What is an EHR?

EHRs are **real-time, client-centered records that make information available** instantly and securely to authorized users.

EHRs focus on the **total health of the client** – going beyond standard data collection to provide a more inclusive view on a client's care.

In an EHR, **information moves with the client** – to different levels of care – and represents the **ability to share information** among providers.



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# What is the difference?

## SanWITS:

**Data entry system** to comply with state reporting and billing



**Data is siloed** – Providers can only see data entered by their own program



Tracks **bed capacity within a single program**



## SmartCare:

**Comprehensive client chart** to capture and combine clinical documentation in addition to reporting and billing data

**Data is shared** – Providers can see charting entered by all programs using the EHR with appropriate consents

Tracks **bed capacity and appointment availability across all programs** to allow for more comprehensive client care



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# Use Cases

- 1) A client is discharging from your program. They need a higher level of care closer to where they live so that services are immediately accessible to them. As a provider, **you will be able to see real time availability in SmartCare to make an appropriate warm hand off.**
- 2) A client is accessing both mental health and substance use services at the same time from two different providers. As a SUD provider, **you can access mental health treatment notes to make more informed decisions.**
- 3) A client has an appointment at your clinic next week. **They will receive an automated appointment reminder via text message or email** the day before their appointment.



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# What if I have my own EHR?

Providers will **largely continue to use their own EHR for clinical documentation** as they do now.

Like SanWITS, **certain information will need to be entered into SmartCare**, e.g., billing, mandated reporting, etc..

**If you are currently on paper, the intent is for SmartCare to become your EHR** as of September 1, 2024.



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# CaIMHSA's SmartCare Website

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Tools and resources available to you now





# Current Project Status

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SmartCare Project Updates



# SmartCare Project Timeline

## High Level Project Phases & Planned Start Dates

	SmartCare project kick-off:	January 2024
	Project planning, analysis, system configuration:	February - June 2024
	Testing (workflows):	April 2024 – June 2024
	Data conversion:	April 2024 – June 2024
	Testing (converted data):	June 2024 – August 2024
	Training :	July 2024 – August 2024
	Go live:	September 2024



# SUD SOC Participation

## **SUD providers are well represented:**

27 SUD subject matter experts (SMEs) joined the SME demo kick-off on April 19.

20 SUD SMEs now have access to the “sandbox”, which means they can begin testing SmartCare.

SUD SME “deep dives” will begin in May as part of a workflow gap analysis.



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# SmartCare Training

The SmartCare project team is developing training plans for the SmartCare go-live and considering virtual vs. classroom training options

We have developed a survey to help the team assess SOC training needs for the September go-live; specifically, to gauge interest in video vs. in person training



# SmartCare Training

## Video Tutorial Training vs. Classroom Training

Video Tutorial Training	Classroom Training
<i>Ideal for learners who:</i>	<i>Ideal for learners who:</i>
Have experience with an EHR (i.e., understand how to search for clients in an electronic database, and complete digital forms.)	Do not have experience with an EHR (i.e., currently use paper processes and/or are new hires.)
Are self-directed/self-motivated, can work independently, and can follow through to the completion of a task without external support.	Like the classroom experience and appreciate an instructor walking them through a process and managing the delivery of information in real time.
Want to learn on their own schedule and at their own pace.	Want a structured schedule where everyone follows along step-by step as a group.
Prefer to consult written resources or figure things out on their own when "stuck."	Prefer to have an expert available live, and in person for help in real time when "stuck."
Enjoy learning at their own pace, individually.	Enjoy learning as a collective group, socially.
Prefer video-based tutorials when learning something new (like watching YouTube videos) with <i>no hands-on learning</i> .	Prefer <i>interactive hands-on learning</i> practicing the same process steps in a training/testing environment as in the "real" environment.
Do not need validation or confirmation.	Desire immediate feedback from an instructor.

# SmartCare Training

Seeking your feedback!

<https://forms.office.com/g/U2manv0F18>

*\*\*When you complete the survey, please copy and paste the link into an email to share with your staff for completion\*\**



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# SmartCare Reports

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Overview of Reporting Options



# Reporting Options

SmartCare Reports (Canned)

List Pages

Widgets

Ad-hoc Reporting (User Created)



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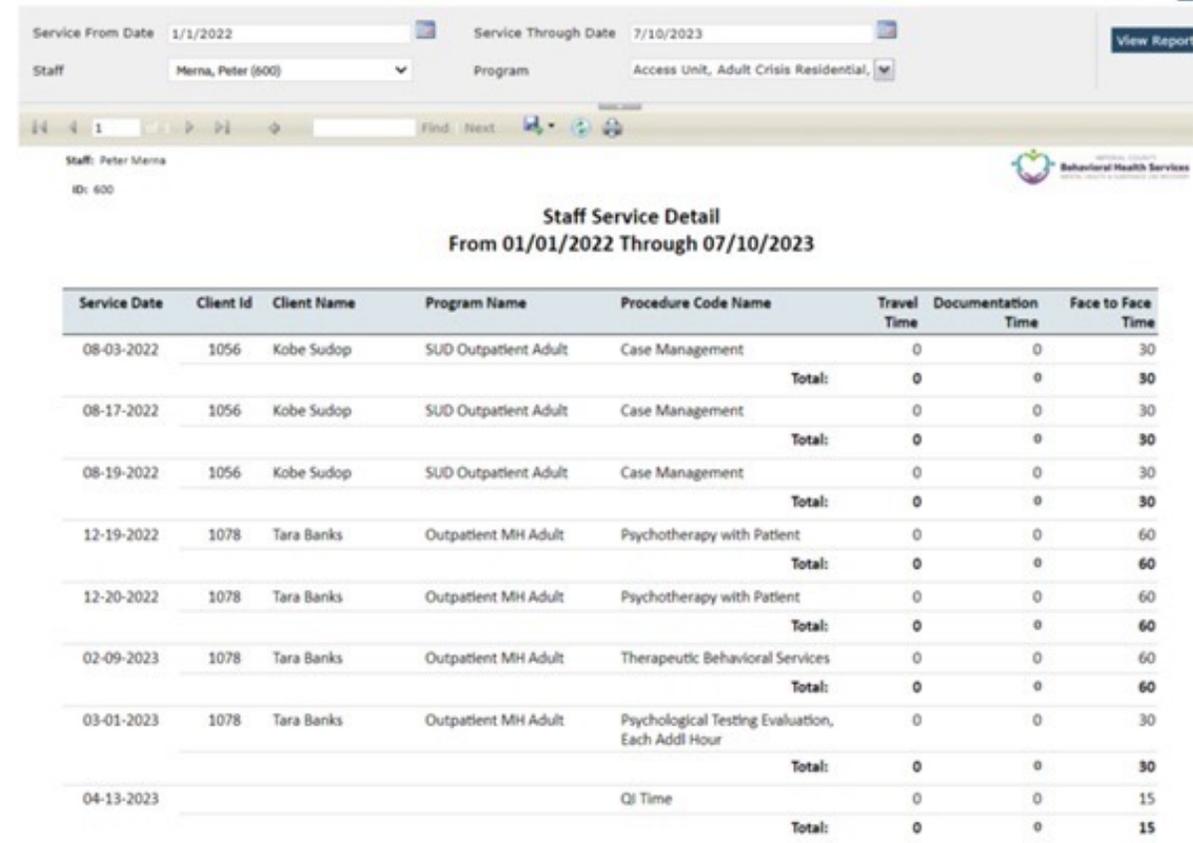
# SmartCare (Canned) Reports

Completely customizable  
by County

Accessible through  
SmartCare

Provides real time  
updates

Data can be constrained  
to the user's role



The screenshot shows a web-based report interface. At the top, there are filters for 'Service From Date' (1/1/2022), 'Service Through Date' (7/10/2023), 'Staff' (Merna, Peter (600)), and 'Program' (Access Unit, Adult Crisis Residential). A 'View Report' button is visible. Below the filters, the report title is 'Staff Service Detail From 01/01/2022 Through 07/10/2023'. The main content is a table with the following columns: Service Date, Client Id, Client Name, Program Name, Procedure Code Name, Travel Time, Documentation Time, and Face to Face Time. The table lists several service entries for staff member Peter Merna, including Case Management and Psychotherapy with Patient, with a 'Total' row for each date.

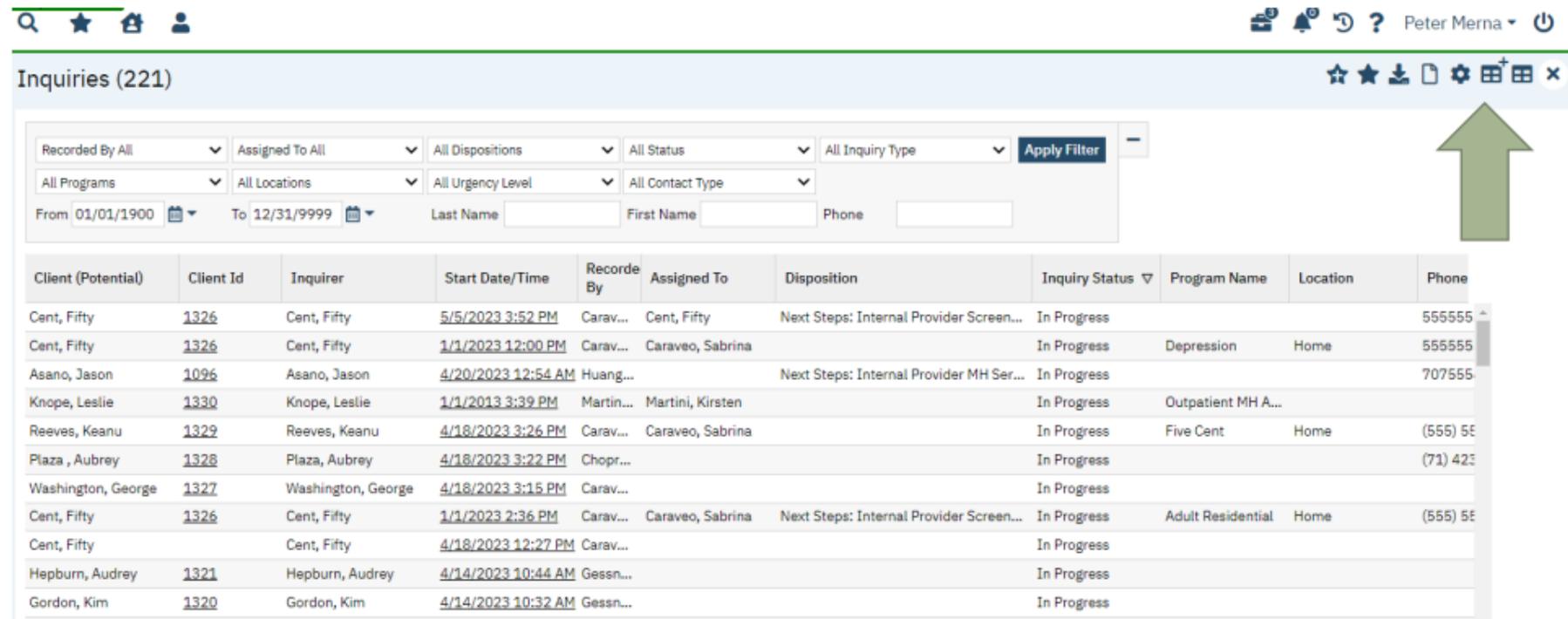
Service Date	Client Id	Client Name	Program Name	Procedure Code Name	Travel Time	Documentation Time	Face to Face Time
08-03-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
08-17-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
08-19-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
12-19-2022	1078	Tara Banks	Outpatient MH Adult	Psychotherapy with Patient	0	0	60
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>60</b>
12-20-2022	1078	Tara Banks	Outpatient MH Adult	Psychotherapy with Patient	0	0	60
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>60</b>
02-09-2023	1078	Tara Banks	Outpatient MH Adult	Therapeutic Behavioral Services	0	0	60
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>60</b>
03-01-2023	1078	Tara Banks	Outpatient MH Adult	Psychological Testing Evaluation, Each Addl Hour	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
04-13-2023				QI Time	0	0	15
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>15</b>



# List Pages

Allows user to save or “favorite” list page settings for future use

Change settings such as columns to show, order, width, and export options



The screenshot displays a web application interface for managing inquiries. At the top, there is a navigation bar with a search icon, a star icon, a home icon, and a user profile icon. On the right side of the navigation bar, there are icons for notifications, a refresh icon, a help icon, and the user name "Peter Merna" with a power icon.

Below the navigation bar, the main content area is titled "Inquiries (221)". To the right of this title is a settings toolbar containing icons for favorite, download, print, settings, and a close icon. A green arrow points to the settings icon.

Below the settings toolbar is a filter section with several dropdown menus: "Recorded By All", "Assigned To All", "All Dispositions", "All Status", "All Inquiry Type", "All Programs", "All Locations", "All Urgency Level", and "All Contact Type". There is also an "Apply Filter" button. Below these are date range selectors for "From" (01/01/1900) and "To" (12/31/9999), and input fields for "Last Name", "First Name", and "Phone".

Below the filter section is a table with the following columns: Client (Potential), Client Id, Inquirer, Start Date/Time, Recorder By, Assigned To, Disposition, Inquiry Status, Program Name, Location, and Phone. The table contains several rows of data, including entries for "Cent, Fifty", "Asano, Jason", "Knobe, Leslie", "Reeves, Keanu", "Plaza, Aubrey", "Washington, George", "Cent, Fifty", "Hepburn, Audrey", and "Gordon, Kim".



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# Widgets

Provides face-up information for specified data

Can build own widgets to display specific data

Widgets can be built based upon Client, General, Insurer, or Provider type

Widgets (81)

All Widget Types Apply Filter

Widget Id	Widget Name	Display As	Widget Type	Screen Id
26	Accounts Receivable	<a href="#">Accounts Receivable</a>	General	
70	Accounts Receivable by Payer	<a href="#">Accounts Receivable by Payer</a>	General	
95	Allergies	<a href="#">Allergies</a>	Client	
21	Appointments For Today	<a href="#">Appointments For Today</a>	General	
71	Appointment for Today with Past Schedu...	<a href="#">Services for Today with Past Scheduled</a>	General	
76	Assigned Document(s)	<a href="#">Assigned Document(s)</a>	General	
60	Authorizations	<a href="#">Authorizations</a>	Insurer	
9	Authorizations Requested	<a href="#">Authorizations Requested</a>	General	
93	BMI	<a href="#">BMI</a>	Client	
104	CalOMS Reporting Summary	<a href="#">CalOMS Reporting Summary</a>	General	
108	CalOMS Reporting Summary	<a href="#">CalOMS Reporting Summary</a>	General	
105	CANS Reporting Summary	<a href="#">CANS Reporting Summary</a>	General	
109	CANS Reporting Summary	<a href="#">CANS Reporting Summary</a>	General	
57	Care Management Claims	<a href="#">Master Claims Widget</a>	Insurer	
56	Care Management New Alerts/Messages	<a href="#">Care Management New Alerts/Messages</a>	General	

Client Dashboard Save

### Treatment Team

Role	Name
<Unknown Team Role>	Brusa, Stan
Primary Clinician*	Williams, LaQuita
Program Assignment Staff: SUD Outpatient Adult*	Williams, LaQuita
Program Assignment Staff: Outpatient MH Adult*	Williams, LaQuita

### Summary

Name : Banks, Tara  
DOB : 07/26/1980  
Age : 42 Year  
Home Address : 2407 S Cordial Lane Pacoima, CA 91331  
Home Phone : (323) 518-2668

### UMDAP test

UMDAP Financial Assessment

	12/19/2022
PhoneType	30
RelationshipToClient	6781

### BMI

BMI : 29.29 Weight : 150.00

01/18/2023

### Current Allergies(0)

No data to display



# Ad Hoc Reporting (User created)

Allows user to quickly generate reports with specific, configurable parameters

Data is limited to the user's permissions

Reports can be saved for easy access at a future date

Streamline Healthcare Solutions Ad-hoc Reporting

Logout

Catalog Report Name   Favorite Report

Catalogs

Clinical

Catalog Report

- staff test 1
- client test 1

Entities and attributes

- DocumentCodes
- DocumentDiagnosis
- DocumentDiagnosisCodes
- DocumentDiagnosisFactors
- Documents
- DocumentSignatures
- Locations
- ProcedureCodes
- Programs
- ServiceDiagnosis
- Services
- Staff
- StaffClients

Result columns

Expression	Title	Sorting
Clients ClientId	Clients ClientId	Not sorted
Clients FirstName	Clients FirstName	Not sorted
Clients LastName	Clients LastName	Not sorted
Clients SexDescription	Clients SexDescription	Not sorted

Query conditions

Select records where all of the following apply

Result

Export to Excel Export to Csv Update result

Clients ClientId	Clients FirstName	Clients LastName	Clients SexDescription	Clients SSN	Clients DOB
1	Client	Everyman	Male	111111111	1/1/2000 12:00:00 AM
1007	JeCoB	BAizE	Male	999999999	5/27/2003 12:00:00 AM
1008	Junior	Smith		234555987	0/9/1990 12:00:00 AM
1009	Service	Everyman	Male	134405554	0/12/2019 12:00:00 AM
1010	Sheelu	Ashok		223344556	3/9/1995 12:00:00 AM
1011	Jane	Billing	Female	900000000	2/14/1990 12:00:00 AM

SQL





# SUD SOC Impacts & Actions

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What does this mean for the SOC and what can you do now to prepare?



# SOC Impacts

## How does this impact the SOC?

**All current SanWITS users will transition to SmartCare.** SmartCare is an EHR and will allow for more person-centered and coordinated care.

If you are currently on paper, the intent is for SmartCare to become your EHR.

If you currently use your own EHR, you can continue to do so for clinical documentation, but will still use SmartCare for some data entry / functionality

**All EHR users will require training prior to go-live.** Training plans are in development and will be shared as they become available.



# SOC Impacts

## How does this impact the SOC?

**All programs will need to prepare for go-live.** Downtime procedures will be required. Downtime procedures will be updated and available in the SUDOPOH.

**After implementation, the SOC will need to look at SanWITS for historical information.** BHS is evaluating how and where current and historical client records will be accessed.



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# SOC Action

**Become familiar with SmartCare via the CalMHSA website**

In particular, begin reviewing the following information:

Substance Use Documentation:

<https://2023.calmhsa.org/substance-use-documentation/>

Downtime Forms:

<https://2023.calmhsa.org/smartcare-downtime-forms/>



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# Summary of SOC Actions

## What should the SOC do now to prepare?

- **Review SU documentation information and downtime forms on the CalMHSA website** to familiarize yourself with the system
- Begin to think about **who will serve as site lead**
- **Review hardware, software, and network requirements** to ensure you have the required customer workstation set-up for go-live
- Begin to **plan for go-live at your site; know your downtime procedures**
- **Maintain awareness** about project status
- **Communicate with your staff** to raise awareness



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# Next Steps

## What happens now?

SUD SME Deep Dives (For workflow gap analysis): May 2024

Next Town Hall: May 21, 2024

The County will continue to communicate new actions and timelines





# SOC Resources

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Where can I find more information?



# SOC Resources

## Where can I find resources and information?

- For up-to-date information and SOC resources, go to the DMC-ODS Provider page on the Optum website ([follow this link](#)) and click on the **SmartCare tab**.



[Home](#) > [BHS Provider Resources](#) > Drug Medi-Cal Organized Delivery System

## Drug Medi-Cal Organized Delivery System

Welcome to the County of San Diego's Behavioral Health Services (BHS) Drug Medi-Cal Organized Delivery System (DMC-ODS) **document library**. From this site you will be able to access any communications, forms, and manuals that BHS has sent out to providers. If you are looking for more general information regarding DMC-ODS, please visit the BHS DMC-ODS website by clicking here.

### Training

If you are provider and are looking for a comprehensive list of required provider trainings for DMC-ODS, [click here to visit the DMC-ODS Training site](#). 

If you have questions regarding Training for SanWITS, [a tips and resources page is now available](#) for providers and Program Managers.

[SUDPOH](#) [SUDURM](#) [Forms](#) [Communications](#) [QA Training](#) [Manuals](#) [Toolbox](#) [Beneficiary](#) [NOABD](#) [UTTM](#) [SanWITS](#) [Billing](#) [PC1000](#)  
[Medical Director Info](#) [Recovery Residences](#) [Monitoring](#) [Training - SanWITS](#) [Contracts/Fiscal Admin Svcs](#) [Serious Incident Reporting](#) **SmartCare**

### SmartCare Implementation

#### SYSTEM OF CARE (SOC) INFORMATION AND RESOURCES

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#### SOC RESOURCES

Name	Description	Date
SmartCare Hardware, Software, and Network Requirements (pdf)		
	02/24/2024	2024-03-14



# SmartCare FAQs

## Where can I find resources and information?

- Frequently Asked Questions (FAQs) have been posted (as of 4/10).
- You are encouraged to review (see [this link](#))

**SmartCare Implementation**

SYSTEM OF CARE (SOC) INFORMATION AND RESOURCES

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SOC RESOURCES

Name	Description	Date
<a href="#">EHR Implementation FAQ 4-16-24 (pdf)</a>	SmartCare FAQs as of 4/10/2024	2024-04-25
<a href="#">SmartCare Hardware, Software and Network Requirements - March 2024 update (pdf)</a>	03/18/2024	2024-03-18

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INFORMATION NOTICES

Name	Description	Date
<a href="#">2024-03-11 BHS SUD Provider Memo: Important Substance Use Disorder (SUD) Electronic Health Record (EHR) Project Status Update</a>	03/11/2024	2024-03-13
<a href="#">2024-04-04 SmartCare Information Notice (pdf)</a>	04/05/2024	2024-04-08

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TOWN HALL POWERPOINT PRESENTATIONS

Name	Description	Date
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# Q&A

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For any further questions, contact: [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)

Or go online for more information at: [\*\*Optumsandiego.com\*\*](http://Optumsandiego.com)

