To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	March 5, 2024
Title	Electronic Health Record (EHR) Implementation Project Status Update & Preparation

The SmartCare EHR project officially kicked off on January 25, 2024, and go-live is planned for September 1, 2024. Behavioral Health Services (BHS) is currently in the process of gathering requirements, reviewing the system design, confirming project scope, and defining the project plan. There will then be a period of data conversion and testing prior to training and go-live. Specific dates will be shared as project planning continues. In the meantime, there are several ways providers can begin preparing for go-live.

REVIEW HARDWARE, SOFTWARE, AND NETWORK REQUIREMENTS
CalMHSA has provided BHS with the following requirements for customer workstations:
- Operating system(s) supported
- Browsers supported
- Hardware requirements
- Insurance card scanning hardware
- Signature pad hardware and software
- Network requirements

Providers are strongly encouraged to review these requirements to assess what is needed for each facility. To review, see the document titled "*Hardware, Software, and Network Requirements*" under the Resources section of the EHR Implementation tab of the Optum website. Contact your COR or QIMatters.HHSA@sdcounty.ca.gov with questions.

BEGIN TO IDENTIFY WHO CAN SERVE AS SITE LEADS AT EACH FACILITY
Site leads will fill a critical role at each facility during go-live. An ideal site lead is someone who is an experienced EHR user, respected by colleagues, a strong communicator and detail-oriented, and someone who enjoys resolving issues. The number of site leads will depend on the size and type of facility, hours of operation, and roles represented.

The role of a site lead is to:
- Act as the "go-to" person for their site
- Support staff and secure answers to questions on-site
- Facilitate communication between the site and BHS
- Assist in reporting issues to the help desk
- Participate in briefings prior to and during go-live

All providers will be responsible for identifying the number and roles of site leads needed at each facility. Providers are strongly encouraged to begin assessing how many site leads will be needed for go-live and to begin identifying who will fill this role. Site leads will receive early training and will participate in briefings on communication protocols prior to and during go-live. As project planning continues, BHS will provide guidance on reporting site lead names and contact information.

For More Information:
• Check the EHR Implementation tab on the Optum website under MHP Provider Documents
• Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

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WHAT ELSE CAN THE SYSTEM OF CARE (SOC) DO NOW TO PREPARE?

1. **Communicate early and often with your staff to raise awareness about the magnitude of change they can expect.**
   - Share information at staff meetings as a standing agenda item.
   - Encourage staff to participate in and ask questions during BHS demo meetings and town halls.
2. **Maintain your own awareness about project status to prepare for SmartCare go-live.**
   - This includes continued review of status updates and other materials available on the EHR Implementation tab of the Optum website, participation in town halls, and discussions with your COR or supervisor. Reach out to QIMatters.HHSA@sdcounty.ca.gov with questions.
3. **Review the SmartCare FAQs.**
   - Numerous questions have already been asked via SmartCare town halls and other venues.
   - Please review the FAQs, available on the EHR Implementation tab of the Optum website.
4. **Visit the EHR Knowledge Base on the CalMHSA website.**
   - Providers are strongly encouraged to begin reviewing the materials in the EHR Knowledge Base to begin familiarizing yourself with the SmartCare product. You will find training guides, videos, at-a-glance workflows, FAQs, and more.

KEY UPCOMING DATES

BHS SME Review Meetings (In-person, BHS Administration "La Jolla Room", 3255 Camino del Rio South, San Diego)
- March 11, 2024 | 9:00am – 11:00am
- March 25, 2024 | 1:30pm – 3:30pm

Contact Heather Rey at Heather.Rey@sdcounty.ca.gov for more information on participation in the SME Review Meetings.

SOC Town Hall (Virtual)
- March 19, 2024 | 1:00pm - 2:00pm | Meeting Link – Microsoft Teams
- April 30, 2024 | 1:00pm - 2:00pm | Meeting Link – Microsoft Teams

For More Information:
- Check the EHR Implementation tab on the Optum website under MHP Provider Documents   - Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov