

SmartCare Site Lead Go-Live Tip Sheet

On September 1, 2024 SmartCare will replace CCBH and SanWITS



CCBH and SanWITS will still be available for review of historical clinical information and for the documentation of services prior to 9/1.

Timeline and Checklist:

- Communicate your site's go-live date: (Sept. 1st to 3rd)
- Print face sheets, client profiles, and appointment details for go-live week if it's preferable to have a printed copy for data entry rather than referring to CCBH/SanWITS.
- Ensure staff know downtime procedures and where to access downtime forms <https://2023.calmhsa.org/smartcare-downtime-forms/>
- By 7:00 a.m. on 9/1 users should receive an email with the URL and login information.** Launch MS Edge or Google Chrome and follow the directions in the email to login.
- Post and distribute the **SmartCare Support Go-Live Week** form.
- Diagnosis:** need to be cleaned up
- Medications:** view PDF in SmartCare **Problems, Allergies:** will need to be manually entered by providers/nurses
- Bed assignments:** for CSU/Crisis Res and Residential programs need to be manually entered
- Authorizations:** will be completed on paper and faxed to Optum who will enter them in SmartCare
- Insurance other than Medi-Cal:** Complete the *SmartCare Client Insurance Plan Request* form (available on the Optum website) and BHS will enter the data into SmartCare.
- Document Scanning:** download the required driver when prompted [here on the CalMHSA website](#)
- Prescribers:** Download the *Symantec VIP* access app for e-Rx.
- Drop in Office Hours and Scheduled Practice Sessions:** Starting 9/3. Information is on Optum site.

From 7:00 a.m. to 12:00 a.m. September 1st -6th CalMHSA will provide Go-Live Support

<https://2023.calmhsa.org/live-chat-support/> email: calmhsa.sandiego@Buchanan-mail.onbmc.com or call 833-686-6801

Troubleshooting Guide:

Situation	Recommendation	Support
User didn't receive email with URL and login info.	Check Spam/Junk mail folders.	Have user contact CalMHSA via <i>Live Chat Support</i> https://2023.calmhsa.org/live-chat-support/
User can't find clients in SmartCare.	<ul style="list-style-type: none"> • Are they in the Train domain? Ensure the URL doesn't have <i>Train</i> in the name. • Is it a new client? 	<ul style="list-style-type: none"> • Find the correct URL (from their email) • New clients entered after 8/25 are being manually entered by BHS through 8/31. If you can't find a new client in SmartCare, refer to CCBH or SanWITS and enter the client profile data in SmartCare.
User gets invalid password or invalid username error.	Are they following the directions in the email?	<ul style="list-style-type: none"> • Contracted Providers: Use the "Forgot Username" and/or "Forgot Password" links from the login screen. • County Employees: Enter County network username (SSO) and password.
User pulls down on the CDAG program enrollment and it is blank.	Are they logged into the correct domain? Has the client been assigned to the program?	Have user contact CalMHSA via Live Chat Support https://2023.calmhsa.org/live-chat-support/
User doesn't recall workflows or navigation.	What is their role? Did they complete the training modules?	CalMHSA EHR Knowledge Base select links from the left side of the page https://2023.calmhsa.org/ Sign up for <i>Office Hours</i> or <i>Scheduled Practice Sessions</i> .

