

SmartCare Site Leads Recommendations



Each program within the Behavioral Health Services (BHS) mental health and substance use disorder systems of care is **strongly recommended to identify one or more site leads per site to assist with on-site communication and troubleshooting for the SmartCare go-live**. The purpose of this recommendation is to not only streamline communications within programs, but also between each program site and BHS. This will help to reduce the overall time spent by program staff on communications during the go-live period.

Roles and Responsibilities

Site leads are staff or management who are identified by their program leadership to serve as on-site support leading up to, during, and immediately after the SmartCare go-live.

During go-live, the site lead is to:

- Act as the “go-to” person for their site,
- Support staff by managing questions on-site,
- Facilitate communication between the site and BHS as needed,
- Assist in reporting issues to the help desk as needed, and
- Participate in briefings prior to and during go-live.

Selecting Site Leads

Good candidates for site leads are individuals who are experienced front-line users, trusted by colleagues, strong communicators, detail-oriented, and who enjoy solving problems.

The number of site leads needed for each site will depend on many variables; each site should assess their needs with consideration for the following:

- Size of site, in particular number of staff (i.e., larger sites may consider more site leads).
- Types of services offered and hours of operation (i.e., a site operating 24/7 may need multiple site leads across shifts).
- Readiness for SmartCare (i.e., a facility previously documenting only on paper may consider more site leads).

BHS recommends at a minimum one site lead per shift who is familiar with clinical workflows, and one site lead per shift who is familiar with administrative workflows. This may be a single person familiar with both clinical and administrative workflows. If your program already has superusers participating in testing, we encourage them to serve as a site lead, though this is not required.

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For more information, go to [OptumSanDiego.com](https://www.optum.com/san-diego) and click on the SmartCare tab under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.

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Time Commitment and Preparation

Leading up to go-live, most site lead preparation will occur via SmartCare training, the specific details of which are in development.

The additional time commitment for site leads, not inclusive of SmartCare training or additional duties assigned by their respective programs, is roughly 5 hours total. This includes:

- Attend a one-hour virtual briefing with BHS to review protocol for how to report issues and access resources and support during go-live.
- Attend two virtual 20-minute briefings per day during the week of go-live.

While not required, site leads may also help to support internal preparation and communication at each site. For example:

- Attend town halls and share information back with the program.
- Assist in tracking training completion for all on-site EHR users.
- Help leadership prepare for go-live by, for example, supporting downtime preparation.
- Act as an on-site champion to ensure staff are knowledgeable about SmartCare, prepared for go-live, and excited about the opportunity!

Next Steps

Please report the requested information for all identified site leads [via this form](#) no later than June 14.

If you have questions, contact Politimy.Paraskevopoulos@sdcounty.ca.gov.



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