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| To: | BHS County-Operated Providers and BHS Contracted Service Providers |
| From: | Behavioral Health Services |
| Date: | July 19, 2024 |
| Title | Summary of SmartCare Implementation Updates |

SmartCare will be implemented as the electronic health record (EHR) for both the mental health (MH) and substance use disorder (SUD) systems of care (SOC) on September 1, 2024. This information notice serves as a summary of recent guidance shared with the SOC in preparation for go-live.

TRAINING

SMARTCARE EHR TRAINING SUMMARY

Required training for the September 1, 2024, SmartCare go-live began on July 15, 2024 and must be completed by August 2, 2024 to be granted go-live access to SmartCare. Required training is role-based and offered on-demand. After required training completion, optional training and support will be offered. The following guidance and resources were shared with the SOC on **July 8, 2024** and can be found at the links below.

- SmartCare EHR Training Summary: [DMC-ODS link](#) | [MHP Provider Documents link](#)
- SmartCare Required Training by Role Grid: [DMC-ODS link](#) | [MHP Provider Documents link](#)
- SmartCare LMS log in Tip Sheet: [DMC-ODS link](#) | [MHP Provider Documents link](#)

BHS emailed instructions for accessing the TRAIN domain on July 12, 2024, which will allow users to follow along while taking the training. Once users have completed the steps to set up an account in the TRAIN domain, they can log in to complete the [CalMHSA Learn \(LMS\) System training modules](#). If you did not receive these instructions, contact BHS_EHRProject.HHSA@sdcounty.ca.gov,

The **SmartCare Go-Live Optional Training Registration Process** is being finalized and will be shared later this month. The **SmartCare Go-Live Optional Training Calendar** is in final development with classroom and online virtual classes offered daily August 2 through August 23, 2024.

Training for Residential, Crisis Stabilization Units, and e-Prescribing is still in development and will be shared as soon as available.

CCBH TRAINING AND DOCUMENTATION GUIDANCE

CCBH training ended on June 26, 2024. [CCBH Training and Documentation Guidance](#) was released by BHS on June 27, 2024, summarizing program actions for both new hires and current CCBH users after June 26, 2024.

SANWITS TRAINING AND DOCUMENTATION GUIDANCE

SanWITS training will end on or before July 17, 2024. [SanWITS Training and Documentation Guidance](#) was released by BHS on June 27, 2024, summarizing program actions for both new hires and current SanWITS users after July 17, 2024.

For More Information:

- Check the SmartCare tab on the Optum website under [MHP Provider Documents](#) for the MH SOC or [DMC-ODS Provider Documents](#) for the SUD SOC.
- Contact your Contracting Officer's Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov



Table with 2 columns: Field (To, From, Date, Title) and Value (BHS County-Operated Providers and BHS Contracted Service Providers, Behavioral Health Services, July 19, 2024, Summary of SmartCare Implementation Updates)

REQUIREMENTS AND FUNCTIONALITY

SMARTCARE DATA MIGRATION

Minimal demographic information on clients currently in CCBH and in SanWITS will be migrated into SmartCare for go-live. The goal is to ensure providers can find a client in SmartCare and know based on the information available whether they need to go to the legacy system for additional information. There will also be a requirement for data re-entry in SmartCare. SmartCare Data Migration Guidance was released by BHS on July 18, 2024 summarizing data migration and required data re-entry and can be found here: DMC-ODS link | MHP Provider Documents link

ENTRY OF CANS AND PSC INTO SMARTCARE

Providers who currently enter the Child and Adolescent Needs and Strength (CANS) assessment and the Pediatric System Checklist (PSC) into the Mental Health Outcomes Management System (mHOMS) will begin entering these assessments into SmartCare at go-live. Entry of CANS and PSC into SmartCare Guidance was released by BHS on July 18, 2024 summarizing this change and can be found here: DMC-ODS link | MHP Provider Documents link

CLIENT INSURANCE ENTRY INTO SMARTCARE

Providers who currently enter insurance plans into CCBH and SanWITS will NOT be responsible for entry into SmartCare at go-live, September 1, 2024. Client Insurance Entry Guidance was released by BHS on July 18, 2024 summarizing this change and can be found here: DMC-ODS link | MHP Provider Documents link

SMARTCARE HARDWARE, SOFTWARE, AND NETWORK REQUIREMENTS

CalMHSA has provided BHS with requirements for customer workstations. Providers are strongly encouraged to review these requirements to assess what is needed for each facility. See the Hardware, Software, and Network Requirements – March 2024 update available here: DMC-ODS link | MHP Provider Documents link

GO-LIVE PREPARATIONS

SITE LEAD PREPARATION

More than 600 site leads were identified by the SOC; a kick-off meeting was held on July 17, 2024. A welcome email with important dates and details of the role was sent to all identified site leads on July 2, 2024. If you or a member of your team were identified as a site lead but did not receive this welcome email, please reach out to Timmy Paraskevopoulos, the site lead point of contact, at Politimy.Paraskevopoulos@sdcounty.ca.gov.

For More Information:

- Check the SmartCare tab on the Optum website under MHP Provider Documents for the MH SOC or DMC-ODS Provider Documents for the SUD SOC.
Contact your Contracting Officer’s Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov

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ADDITIONAL INFORMATION

WHAT ELSE CAN THE 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.
- 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 SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website, participation in town halls, and discussions with your COR or supervisor.
- 3. Ensure your program management and site leads are prepared for go-live at each facility**
 - This includes participation in required or recommended meetings and trainings, and awareness of downtime procedures.
- 4. Review the SmartCare FAQs.**
 - Numerous questions have already been asked via SmartCare town halls and other venues.
 - Please review these FAQs, available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website.
- 5. Visit the EHR Knowledge Base on the [CalMHSA website](#).**
 - Numerous tools are available on the website for your review to begin familiarizing yourself with the SmartCare product. You will find training guides, videos, at-a-glance workflows, FAQs, and more.
 - Providers are strongly encouraged to review these materials.

KEY UPCOMING DATES

SOC Town Hall (Virtual)

- **July 29, 2024** | 1:00pm - 2:00pm [Click here to join this meeting.](#)
- **August 27, 2024** | 1:00pm – 2:00pm [Click here to join this meeting.](#)

Training

- **July 15 – August 2, 2024** | Required SmartCare LMS Training
- **August 5 – August 23, 2024** | Optional SmartCare Classroom or On-line Virtual Training
- **September 1 – September 6, 2024** | Optional SmartCare Classroom or On-line Virtual Support

Go-Live

- September 1, 2024

For More Information:

- Check the SmartCare tab on the Optum website under [MHP Provider Documents](#) for the MH SOC or [DMC-ODS Provider Documents](#) for the SUD SOC.
- Contact your Contracting Officer’s Representative (COR) or QIMatters.HHSA@sdcounty.ca.gov