

SmartCare Data Migration



This resource offers information and guidance to providers about data migration from the legacy systems into SmartCare.

Data Migration Into SmartCare

Minimal demographic information on clients currently in CCBH or 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. This will occur in the following ways:

- Migration Directly From SanWITS: Minimal demographic information on all clients since 2018 and most other older clients
- Migration Directly From CCBH: Minimal demographic information on all clients (including Insyst), plus open authorizations and scheduled appointments

Additionally, for CCBH PDFs will be available for data that cannot be directly migrated into SmartCare.

These include:

- All Medications, Diagnoses, and Allergies for all open clients and those closed within the past two years
- Clinical documentation within the past two years, including the most recent:
 - Discharge Summary
 - Behavioral Health Assessment (BHA) (Adult and Children)
 - Mobile Crisis Assessment
 - Crisis Stabilization Unit (CSU) Episode Summary
 - Problem List
 - Psychiatric Assessment
 - Progress Notes

Required Data Re-Entry In SmartCare

- **Some data cannot migrate to SmartCare and will need to be entered at go-live for clients.** This is primarily due to compatibility of the legacy systems with SmartCare - data sets cannot be directly matched. **Data that will need to be entered for all clients include medications and problem lists.**
- **Review of diagnoses will be necessary.** Diagnoses in SmartCare are stored at the program level versus at the client level, so diagnoses migrated from CCBH and SanWITS into SmartCare are only available within the program. **This means that providers may not have access to information that was historically in CCBH or SanWITS, and diagnoses may need to be re-entered in SmartCare.**
- The last data migration from CCBH and SanWITS into SmartCare before go-live is currently client data entered through approximately August 15 – August 20. **This means that there are potentially 10-15 days of data (for clients seen August 16 – 21 through August 31) that programs must enter in CCBH or SanWITS, and then re-enter into SmartCare after go-live.** The County realizes this is a significant burden and is attempting to shorten this timeline.

For more information information or questions, contact QIMatters.HHSA@sdcounty.ca.gov.