Electronic Health Record (EHR) Implementation Town Hall

January 30, 2024

County of San Diego

Heath and Human Services Agency

Behavioral Health Services

Meeting Goals

Transparency

Engagement

Inclusion

Preparation

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Meeting Agenda

- **A Quick Recap**

- **Highlights & Project Overview**

- **SOC Engagement & Impacts**

- **SOC Actions**

- **Q&A**

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Quick Recap

What did I miss in the last town hall?

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Recap: SmartCare Will Replace CCBH

What did I miss in the last town hall?

- BHS halted the implementation of Cerner Millennium as the replacement for CCBH and pivoted to SmartCare, a new EHR offered through the California Mental Health Services Authority (CalMHSA).

- In July 2023, CalMHSA launched a semi-statewide EHR as a first step toward holistic county behavioral health data aggregation and interoperability.

- Streamline's SmartCare was selected by CalMHSA as the EHR product

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Recap: SmartCare Will Replace CCBH

Why is the County selecting SmartCare?

- SmartCare is designed specifically for California behavioral health services systems.

- Currently, more than 25 counties in California have or are implementing SmartCare

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Highlights & Project Overview

Where are we now?

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Highlights

A little about CalMHSA and this project

WHO
California Mental Health Services Authority (CalMHSA) is a Joint Powers Authority (JPA) supporting the public behavioral health system. For this project they have partnered with **25+ counties,** representing more than 37% of the Medi-Cal population.

WHAT
The semi-statewide electronic health record (EHR) project is developing a customized solution to meet the specific complex business needs of the California behavioral health system which functions as both a provider of specialty clinical care and a managed care plan.

WHEN
Phase 1 efforts (23 Counties) coincided with the go-live of payment reform: July 1, 2023. For San Diego County, go-live will coincide with the sun-setting of the CCBH system, September 1, 2024.

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Why a Semi-Statewide EHR?

- Create an **enterprise solution** that supports the totality of county behavioral health organizations needs and requirements.

- Leverage **economies of scale** to engage state and national experts to design a **master consent** framework, **natural collection of outcomes**, and a **lean record using human-centered design**.

- Utilize **collective activism** to drive rational change processes.

- **Leverage the moment** to build a new record consistent with CalAIM Documentation Redesign and Payment Reform.

- Design a solution to ensure **data accessibility and interoperability** – supporting care coordination and whole person care.

Partnering to build a lean, high functioning Enterprise EHR that meets the needs of the California Public Behavioral Health System

Outcomes

Master Consent Master Client Index Real Time Eligibility

Beyond Medi-Cal

Staff Management

Compliance & Training

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Why Now? – Demand is Up

Total Medi-Cal Certified Eligible Clients

April 2020 through March 2022

Month	Value
Apr 2020	12,614,029
May 2020	12,742,448
Jun 2020	12,865,766
Jul 2020	13,001,052
Aug 2020	13,109,242
Sep 2020	13,205,505
Oct 2020	13,299,576
Nov 2020	13,384,310
Dec 2020	13,539,527
Jan 2021	13,665,091
Feb 2021	13,721,205
Mar 2021	13,824,018
Apr 2021	13,920,865
May 2021	13,993,761
Jun 2021	14,059,905
Jul 2021	14,136,143
Aug 2021	14,223,883
Sep 2021	14,296,024
Oct 2021	14,359,516
Nov 2021	14,418,849
Dec 2021	14,491,867
Jan 2022	14,570,865
Feb 2022	14,585,184
Mar 2022	14,603,812

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Why Now? – Supply Down

We have a major workforce shortage

- Mental Health

  - 21% of budgeted LPHA positions vacant (957 vacant positions)

  - 23% of counties have MH vacancies over 30% (up to 52%)

1 OUT OF EVERY **5**

MASTER'S LEVEL STAFFING

POSITIONS IS VACANT.

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Why Now? – Complexity Up

2009 = 38 INFORMATION NOTICES
2021 = 75 TOTAL INFORMATION NOTICES

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WORKFORCE ⬇

+ HUMANS
NEEDING CARE ⬆

+ MANAGED CARE
FUNCTIONS ⬆

CHANGE IS ESSENTIAL

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EHR Implementation

In just 7 months? Then vs Now…

- **Then:** The initial implementation of an EHR was a new experience
  - Difficult to understand the implication of documentation decisions
  - Users had a bias towards collecting everything.

- **Now:** All organizations have the benefit of "**lessons learned**"
  - All staff are experiencing documentation fatigue
  - Users are now positioned to **understand the implications** of their input
  - Approach is championed by the state, as a movement throughout the industry

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EHR Implementation
In just 7 months? Then vs Now…

- Everyone agrees with "**Less is more**" until their "**More**" is being "**Lessed**"
  - There will be limitations to what is implemented initially
  - Post go-live there will be time for optimization

- How do we maintain two EHRs during the transition?
  - Exact data to be migrated is to be determined
  - All pre-go-live claims will be worked out of CCBH
  - Eventually CCBH system will be sunset

- What do we do with our historical data needed for audits / access to clinical data requirements?
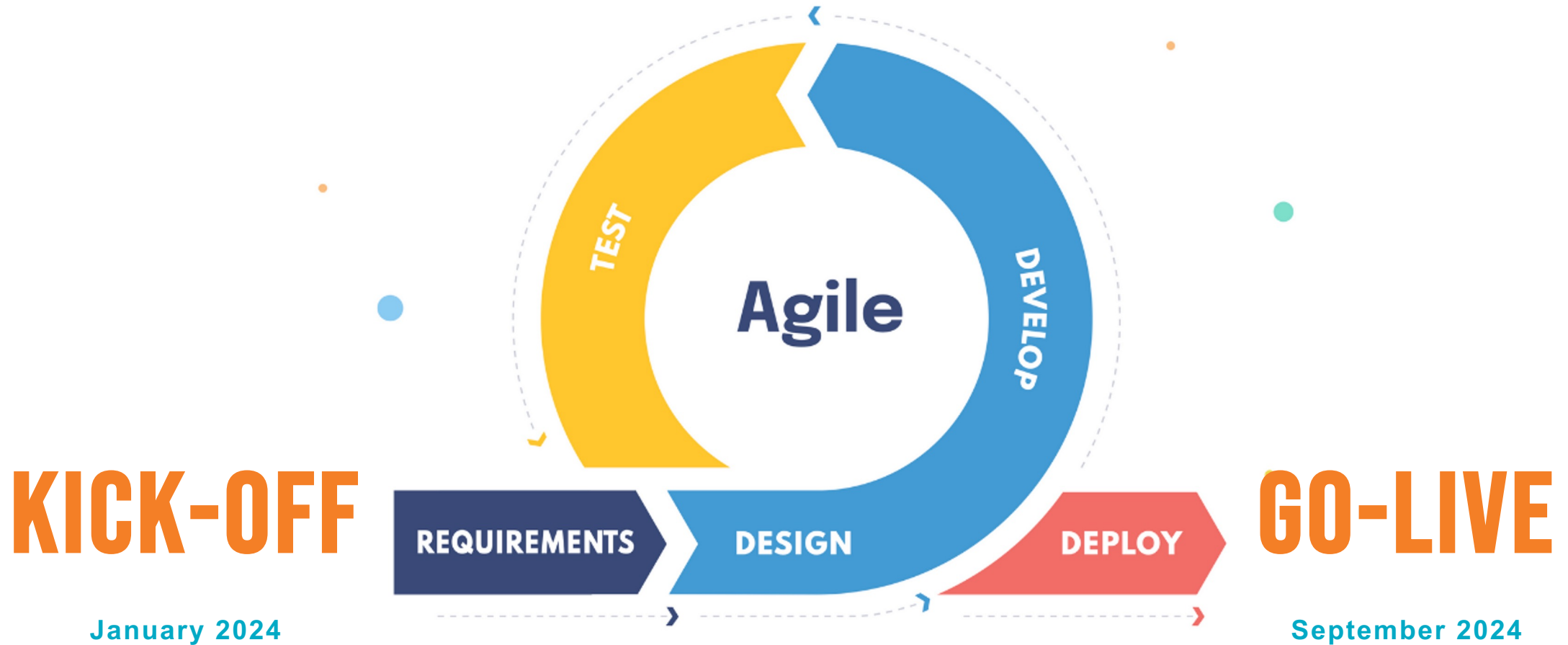 - Separate project with longer timeline

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Implementation Methodology

What does implementation look like?

KICK-OFF

GO-LIVE

January 2024

September 2024

Agile

TEST • DEVELOP • REQUIREMENTS • DESIGN • DEPLOY

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SmartCare Project Kick-off

What happened at the kick-off and what happens next?

- The SmartCare project kickoff took place on January 25

- Representatives from throughout the SOC participated – feedback was overwhelmingly positive

- Next steps: Creation of a project plan and timeline

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SOC Engagement & Impacts

"That EHR Implementation was fun. I really hope that we get to do that again soon."

- No One

SOC Engagement

How will the SOC be involved now?

- System of Care (SOC) Subject Matter Experts (SMEs), including contracted providers will continue to be involved throughout the SmartCare implementation, though there will be fewer design decisions

- Bi-weekly demo sessions with SMEs will continue; the focus for this project will be to develop a deep understanding of how the system works to assist in offering recommendations related to superuser testing and training

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SOC Impacts

How does this impact the SOC?

- SOC preparation for a SmartCare go-live will not change significantly

- Unexpected delays to implementation could be impactful

  - E-prescribing in CCBH will sunset September 2024

  - CCBH will sunset December 2024

- The other impact (independent of EHR) is that after implementation, the SOC will need to look at CCBH for historical information.
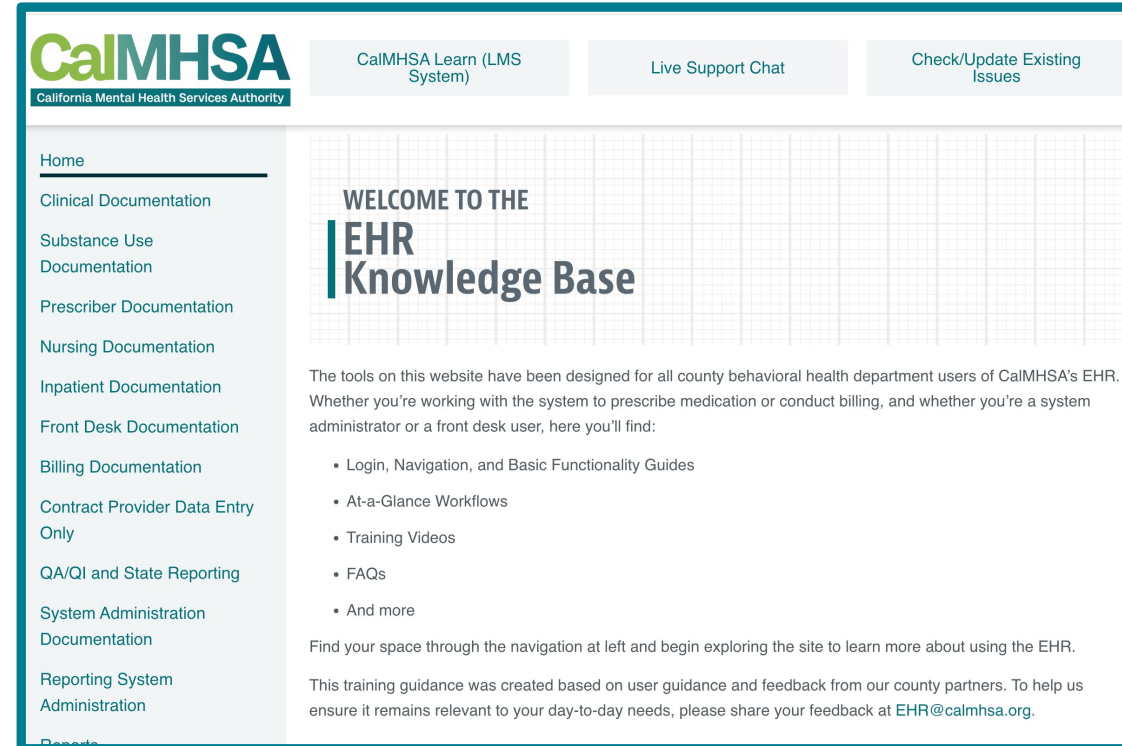
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SOC Actions

What can you do now to prepare?

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SOC Actions

What should the SOC do now to prepare?

- Maintain awareness about project status
- Communicate with your staff to raise awareness
- Begin to think about who at your locations can serve as a champion or site lead for go-live
- Visit the CalMHSA website to review materials (**https://2023.calmhsa.org**)

CalMHSA California Mental Health Services Authority

| CalMHSA Learn (LMS System) | Live Support Chat | Check/Update Existing Issues |

Home

Clinical Documentation

Substance Use Documentation

Prescriber Documentation

Nursing Documentation

Inpatient Documentation

Front Desk Documentation

Billing Documentation

Contract Provider Data Entry Only

QA/QI and State Reporting

System Administration Documentation

Reporting System Administration

Reports

WELCOME TO THE
EHR Knowledge Base

The tools on this website have been designed for all county behavioral health department users of CalMHSA's EHR. Whether you're working with the system to prescribe medication or conduct billing, and whether you're a system administrator or a front desk user, here you'll find:

- Login, Navigation, and Basic Functionality Guides
- At-a-Glance Workflows
- Training Videos
- FAQs
- And more

Find your space through the navigation at left and begin exploring the site to learn more about using the EHR.

This training guidance was created based on user guidance and feedback from our county partners. To help us ensure it remains relevant to your day-to-day needs, please share your feedback at EHR@calmhsa.org.

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SOC Resources

What happens next?

SOC Resources

Where can I find resources and information?

- For up-to-date information and SOC resources,
  scan the QR code below or go to the MHP
  Provider Documents page on the Optum website
  (**follow this link)** and click on the **EHR
  Implementation tab**.
  - Resources will be updated accordingly with new
    project details as they become available

Q&A

For any further questions, contact: **QIMatters.HHSA@sdcounty.ca.gov**

Or go online for more information at: **Optumsandiego.com**

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