



MH and SUD SOC SmartCare Town Hall

September 19, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



Meeting Goals



Transparency



Engagement



Inclusion



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Meeting Agenda

- General Updates & Reminders
- Help Desk & Reporting
- Access & Training
- System Updates
- Functionality and Requirements
- SOC Resources
- Q&A



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General Updates & Reminders

High-level Information about the SmartCare implementation



SmartCare Status

Success and challenges of go-live

- On September 1, SmartCare went live for the MH and SUD SOC
- Go-live successes:
 - Minimal system slowness
 - Clinical migration completed as planned overall
- Go-live challenges:
 - Considerable access issues due to the various set up configurations
 - CalMHSA help desk format unfamiliar to our SOC



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Entry of Services

Important Reminder

- **IMPORTANT REMINDER:** Programs should NOT enter any services into CCBH or SanWITS for dates of service occurring before 9/1/2024
- Any services entered in CCBH or SanWITS for dates of service occurring on or after 9/1/2024 will need to be re-entered into SmartCare to avoid billing impacts.



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CCBH Access is View Only

Important Reminder: Do not document in CCBH

- Providers may need to view historic information in CCBH
- Most providers have CCBH access to allow for viewing of information for clients who have been opened to the provider's program.
- If needed, providers may open an assignment for the client in CCBH to view this documentation, and then close in CCBH when the client closes with them in SmartCare.
- Providers should not complete any intake documentation or update any client information in CCBH – this is for view only purposes.



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Site Leads

Thank you to the site leads supporting the SOC during go live!

- Site leads met twice per day during go-live week for briefings, and three times for briefings last week.
- While the site lead briefings have now ceased, other mechanisms are in place for ongoing discussion and escalation.
 - A survey will be sent to site leads this week to capture feedback
 - Site leads will meet again in October for a project closeout meeting & 30-day review.



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SmartCare Advisory Group

Continuation of Advisory Group Activities

- Advisory Group meetings will continue to communicate issues, discuss questions about policy changes, and explore post-go live considerations or issues
- QA representatives from the MH and SUD SOC participate to ensure alignment for policy and procedure and SOC concerns
- Purpose is to share information, collaborate on decisions, and to operate under one SOC



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Help Desk & Reporting

Process to Access Support



Issue Reporting & Questions

General Help Desk Processes and Structures

- Contact the CalMHSA help desk first for all SmartCare issues and concerns
- Exception: If you know you need to submit an ARF, complete the ARF form and send directly to MIS at BHS_EHRProject.HHSA@sdcounty.ca.gov
- If you have a question about access and are not sure if an ARF is needed, start by reaching out to the CalMHSA help desk.
- QIMatters.HHSA@sdcounty.ca.gov should be used now only for clinically related questions (as with CCBH and SanWITS)



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Help Desk

Ongoing Support

- Help desk hours available Monday - Friday (7:00am – 7:00pm)
- Preferred order of contact: Chat → Ticket → Phone Call
- Outside normal business hours, call for system outage issues only

SmartCare Help Desk Support



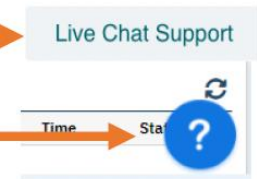
Beginning September 7, 2024, SmartCare support for system issues is offered by CalMHSA during normal business hours (in order of preferred contact):

Monday – Friday, 7:00am – 7:00pm

1. Connect via Live Chat

Live Chat can be accessed in one of three ways:

- Go to 2023.calmhsa.org and click on “Live Chat Support” at the top of the screen
- Click on the blue question mark on the bottom right corner of the screen when logged in to SmartCare
- Use this URL:
https://crbeta.Buchanan.com/teamsccmes_senger/calmhsa.html



2. Submit a Ticket

A ticket can be created in one of two ways:

- Emailing calmhsa.sandiego@Buchanan-mail.onbmc.com
- Submitting a ticket via 2023.calmhsa.org



CalMHSA Learn (LMS System)

Live Chat Support

Check/Update Existing Issues

3. Call (833) 686-6801

- Available during normal business hours

Note: After normal business hours, the only support available is for system outages. Call (916) 214-8348

Updated September 6, 2024

Resources

Ongoing Support

- CalMHSA Knowledge Base is available at 2023.calmhsa.org
- Access help from within SmartCare
- Access San Diego specific resources via MHP Provider Documents and DMC-ODS pages of Optum website

SmartCare Resources



Numerous SmartCare resources are available to assist you with workflow and documentation questions:

1. Go to the CalMHSA Knowledge Base

Visit the links on the CalMHSA website at 2023.calmhsa.org to explore SmartCare EHR documentation and support tools organized by role:

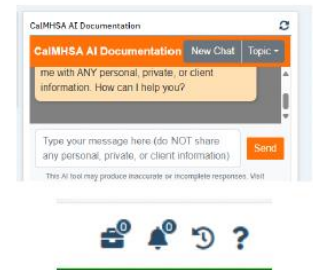
- Use the **search box** on the bottom of the navigation links to search the entire CalMHSA library, or
- Use **Ctrl + F** on your keyboard to search for key words within the **Documentation** sections.



2. Access help from within SmartCare

Once you are logged in to SmartCare, you can access help in the following ways:

- Use the CalMHSA **AI Documentation chatbot** to ask direct questions about workflow and documentation, or
- Click on the **black question mark** at the bottom of your screen to find “how to” documents on the CalMHSA website.



3. Access San Diego Specific Resources

For resources and guidance specific to San Diego County’s use of SmartCare, go to either the [MHP Provider Documents](#) or [Drug Medi-Cal Organized Delivery System](#) pages of the **Optum website** and click on the **SmartCare** tab.





SmartCare Access & Training

Details, Requirements



SmartCare Access

Review and updates to role-based access

- BHS recognizes that SmartCare system access has been a significant challenge and is taking steps to remediate.
- In particular, there have been problems with users having the correct role-based access
- BHS is working through a process to review each role in detail to ensure the correct access.



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SmartCare Access

Steps to take if users do not have access

- If **no** email with login information was received by the user:
 - Sent to an alternate email address or in a spam or junk folder
 - No active account in CCBH or SanWITS
 - Did not finish LMS training
 - LMS training account and SmartCare account could not be matched
- All tickets should start with the CalMHSA help desk



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New User System Access

Process for new users to SmartCare

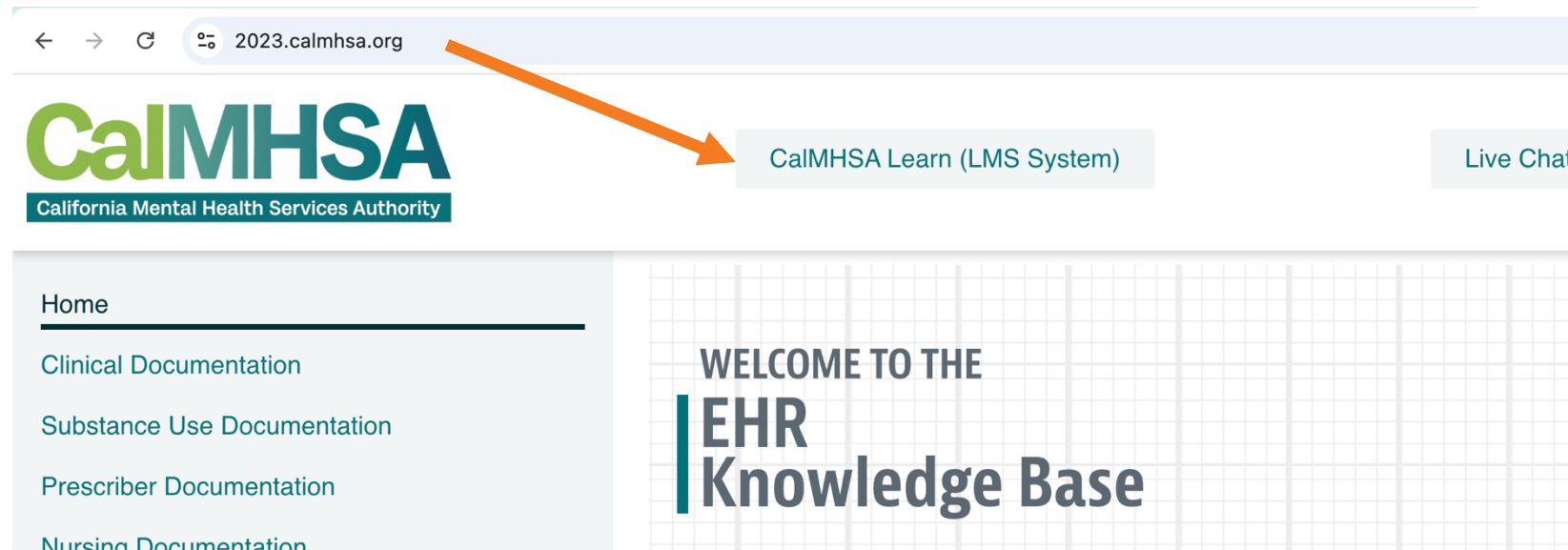
- The SmartCare Access Request Form (ARF) must be completed by all new users for access to SmartCare and submitted to BHS per instructions.
 - New Access Request Form (ARF) is taking 7-10 days to process
- All new users must also complete the required trainings.



Required Training to Access SmartCare

Complete Required LMS Training ASAP

- The training required to access SmartCare continues to be available via LMS
- **Staff who did not have access to SmartCare at go-live should complete training as soon as possible to get access.**



The screenshot shows the CalMHSA website interface. The browser address bar displays "2023.calmhsa.org". The CalMHSA logo is prominently displayed, with the tagline "California Mental Health Services Authority" below it. A navigation menu on the left includes links for Home, Clinical Documentation, Substance Use Documentation, Prescriber Documentation, and Nursing Documentation. A "Live Chat" button is visible in the top right corner. A button labeled "CalMHSA Learn (LMS System)" is highlighted with an orange arrow pointing from the browser address bar. Below the navigation menu, a grid background features the text "WELCOME TO THE EHR Knowledge Base".

Supplemental Training

Details and Timeline

- Optum has extended live, in-person supplemental training through October
- New or existing staff can sign up for in-person training across 10 different roles via RegPack
- For residential, crisis residential, and crisis stabilization units, supplemental training is required for access to SmartCare.



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System Updates

Regular maintenance and other updates



Regularly Scheduled System Maintenance

Details and Timeline

- Regularly scheduled SmartCare system maintenance will occur every Sunday at midnight into Monday morning
- SmartCare will be unavailable for 4-6 hours
- Use downtime procedures during this time
- You may experience extreme slowness if you log in at the end of the maintenance window



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Password Resets

Details and Timeline

- SmartCare passwords must be reset every 90 days
- Users will be prompted at the end of each 90-day period
- Passwords must be at least 8 characters, include upper and lower-case letters, numbers, and a special character.



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SmartCare Functionality and Requirements

Recent Guidance and New Information



Filtering Clients by Program

Requirements and Reminders

- BHS has developed a tip sheet to permanently set a filter to remove clients not in your program.
- This filter will show program administration, front desk, and reception staff a curated view of the clients at the program.
- A tip sheet was shared on September 18 with instructions for setting these filters for program client screen views.



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Client Name / Demographic Changes

Change for SUD SOC (this is already in place for MH)

- SmartCare employs a shared client record across the SOC; thus the BHS Health Information Management Services (HIMS) department will be managing significant client record changes.
- **SOC staff are not to make changes to the following fields: Name, DOB, SSN and Gender.**
- Any changes to these fields need to be submitted to HIMS on form BHS-025 via HIMDEPT.HHSA@sdcounty.ca.gov or secure fax.



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E-Prescribing: CaIMHSA Rx

Details and Timeline

- Prior to go-live, it was believed that integration existed between CaIMHSA Rx and SmartCare; at go-live BHS learned the integration does not exist.
- To fix this issue, doctors and registered nurses were given direct access to CaIMHSA Rx.
 - Doctors currently have access to prescribe medications
 - Registered nurses currently have access to stage medications
- LPHAs will be given access to view and to document existing medications.
- A one-page training is being developed by CaIMHSA



Authorizations

Requirements and Reminders

- CalMHSA is working to allow authorization requests and approvals to be completely maintained in SmartCare; this was not available at go-live.
- The current processes for MH will remain via the County's Prior Authorization request forms or the Optum submission process.
- SUD residential providers will continue to request authorizations via Optum forms and/or current process; Optum will enter approved authorizations into SmartCare.
- Guidance was shared.



Residential and CSU Bed Assignments

Requirements and Reminders

- For all SUD and MH residential and CSUs, when admitting a client to the bed board, the date of bed assignment **MUST** be 9/1/2024 due to system functionality.
- If you entered a bed assignment date prior to 9/1/2024, BHS has made edits in the system, changing the bed assignment day to 9/1/2024.
- Anything entered prior to that date will cause billing issues.



Deletion / Error Process

Requirements and Reminders

Errors Providers Can Correct

- Edit note content
- Edit some service details
- Update group participants / facilitators
- Most assessments / forms can be marked in error by user

See CalMHSA site for error instructions

Deletions / Errors Requiring System Administration

- Duplicate Notes
- Documented in wrong client chart
- Wrong procedure
- Program assignment “in error”

Determination grid being completed for release soon



UMDAP

Requirements and Reminders

- The SmartCare vendor encountered an issue during migration of existing UMDAP information from CCBH into SmartCare.
- A resolution to the issue was identified and it was resolved in the production system on 9/17/2024.



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Updates to TADT Documents

Requirements and Reminders

- The Access to Services Journal (ASJ) is now called Timely Access Data Tool (TADT) in SmartCare
- TADT documents are undergoing minor changes to address recent updates in the July 2024 TADT workbooks. They have been deployed to production environments.
 - DMC-ODS documents now have "urgent" and "prior auth required" fields, including related "time" fields * logic to address requirements.
 - All documents now require entry for "referred to out-of-network provider" regardless of timeliness of access, per DHCS feedback.



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New ROI Deployed to Production

On September 9, 2024

- CalMHSA finished testing the new ROI and deployed it to production environments on September 9.
- Information can be found here: <https://2023.calmhsa.org/how-to-document-a-release-of-information-authorization-to-disclose-confidential-information/>



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SOC Resources

Where do I find resources?



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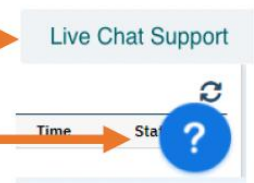
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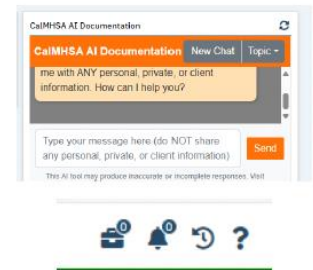
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SUD SOC Resources

Where can I find resources and information?

- For up-to-date information and SUD SOC resources, go to the DMC-ODS Provider page on the Optum website ([follow this link](#)) and click on the **SmartCare tab**.
 - Resources will be updated accordingly with new project details as they become available



MH SOC Resources

Where can I find resources and information?

- For up-to-date information and SOC resources, scan the QR code or go to the MHP Provider Documents page on the Optum website ([follow this link](#)) and click on the **SmartCare tab**.
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Q&A
