



MH and SUD SOC SmartCare Town Hall

November 12, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



Meeting Goals & Agenda



Transparency



Engagement



Inclusion

- SOC Engagement & Input
- Training
- Functionality and Requirements
- SOC Help Desk, Issue Reporting, and Resources
- Q&A





SOC Engagement & Input

Site leads & Advisory Group



Site Leads

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

- Site leads completed a survey related to their experience with the SmartCare implementation
- Two primary themes:
 - Providers experienced difficulty knowing where to go for answers and issues during go-live
 - Providers wanted more focused training than offered via LMS alone
- BHS has enhanced their communication process by use of increased FAQs, more robust training opportunities, more frequent information releases and weekly engagement with the CalMHSA helpdesk to support knowledge of County specific system of care operations
- Site lead briefings / meetings have now ceased, with critical discussion and decision-making occurring through the SmartCare Advisory Group.



SmartCare Advisory Group

Continuation of Advisory Group Activities

- Advisory Group meetings continue to communicate issues, discuss questions about policy change, and explore post go-live considerations.
- QA Representatives from both the MH and SUD SOC participate.
- The purpose is to share information, collaborate with decision making representatives from the SOC, and work together to operate under a single SOC.



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SmartCare Training

Updates and Details



Training Update

New class offerings for Res, Crisis Res, CSU

- For residential, crisis residential, and crisis stabilization unit users, Optum has created and aims to release SmartCare video trainings to give 24-hour programs more options for training:
 - CSU Clinical / Nurse / Prescriber
 - CSU Admin / Clerical
 - Res + Crisis Res Clinical / Nurse / Prescriber
 - Res + Crisis Res Admin / Clerical
- Options for live trainings will still be available.



Training Update

Process & Details for Optum video trainings

- No registration is required
- Program manager should send an ARF to MIS, notifying them of the online recorded sessions to be taken by that staff member
- There will not be an ability to follow along in Train for video classes
- At the end of the videos, users will complete knowledge checks, which are a prerequisite to user access.
- See the Optum SmartCare training webpage for training dates and registration, and for questions contact sdu_sdtraining@optum.com



Technical Support Hours: November

Details and Timeline

- Optum will continue to offer technical support hours (formerly titled office hours) through November.
- These are live virtual sessions where users can drop in based on role.
- As a reminder, current paths for support should still be followed: Optum will not be able to provide access issue support or clinical documentation assistance. Any system issues need to still be communicated to CalMHSA.
- Users can drop in to technical support hours by joining the MS Teams Link available on the Optum SmartCare Training webpage



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SmartCare Functionality and Requirements

Recent Guidance and New Information



Annual Updates for CalOMS Providers

Details and Timeline

- Previous instruction was provided by CalOMS to input annual updates on paper for admission dates in October and November.
- **Programs should now proceed to enter the annual updates previously captured on paper directly into SmartCare for admission dates in October and November 2018 to 2023.**
- The annual update must be completed 10 to 11 months from the admission date.



Annual Updates for CalOMS Providers

Details and Timeline

- When entering annual updates into SmartCare, please follow these steps:
 - Change the effective date to the date the annual update was conducted with the client; SmartCare autogenerates to the current date.
 - Make sure the FSN matches from the admission record.
 - Manually input the annual update number into SmartCare based on the year of the admission date. For example, if the admission date is 10/01/2021, the annual update number for 2024 is 3.
 - Review information.
 - Save and Sign.
- Please report to Bianca Lopez at bianca.lopez@sdcounty.ca.gov upon completion of these records in SmartCare.



Multi-Factor Authentication (MFA)

Details and Timeline

- **To assure the best possible security of our client's data, the County will be rolling out multi-factor authentication (MFA) to all contractor users on November 19.**
- After entering user ID and password, you'll receive an email with a one-time code to enter before accessing the system.
- You will use this MFA each day you log in to SmartCare.
- Please confirm the email address in your SmartCare profile is accurate to avoid access issues and delays: Go to the 'My Preferences' screen, 'Contacts' section.
- Contact the CalMHSA Help Desk with questions or access issues.



CaMHSA Rx: LVN, LPT, LPHA

NEED

- Access to review current medications
- Access to enter home medications

ACCESS

- **Current:** Only RN's & Prescribers
- **In progress:** All LVNs, LPTs, & LPHAs

TRAINING

- Start reviewing CaMHSA Rx training documentation



Setting CalMHSA Rx Preferences for Nurses

Customize CalMHSA Rx to view all prescriptions in queue

- From the CalMHSA Rx homepage, preferences can be set to view all prescriptions in queue.
 - Under the **menu** icon on the lefthand corner of the screen, click **settings**, then **preferences**, then **prescription management**.
 - Place a **check** in the box for “**at this location, show your pending and undeliverable prescriptions from all locations.**”
 - Click **save**
- A one-page job aid has been developed and will be sent to the system of care this week.



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Creating Services in SmartCare

For 24-Hour Programs (Residential)

- 24-Hour programs bill automatically from the Residential Board (Residential/Crisis Residential).
- Services for these facilities should not be entered by admin staff via the Services (Client) screen; This will cause errors in billing for the service.
- If a client enrolled in a 24-Hour program is to be seen at a CSU, the 24-Hour program is to leave the client in current status and do not mark “on leave.”
- The CSU seeing the client will use an interim process to enroll and bill for clients while a permanent solution is developed.
- Documentation should note that the client was seen at a CSU and how long they were away from the facility.
- A day remains billable as long as minimum service provision noted in regulations is met.



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Scanning & Associating Documents

SmartCare Job Aid & Program Responsibility

- A job aid outlining the process for scanning and associating documents to a document type, program, and client was shared with the SOC on October 25.
- The job aid also identifies a risk with unassociated documents, which are those scanned but not associated to a particular client or program.
- **Starting immediately, programs are responsible for performing regular audits in SmartCare to identify users with unassociated documents in SmartCare, and requiring them to correctly associate these documents.**



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Billing Updates

Billing functionality and Instructions

- Some billing functionalities have not yet been turned on in SmartCare
- BHS will start by turning on nightly billing jobs that will assist programs with identifying service errors and will prepare us to eventually generate claims, which will come later.
- We do not yet have a date for either the nightly billing jobs or the subsequent claim generation but are hoping to turn on the nightly billing jobs soon.
- We will provide programs with instructions on how to identify and correct service errors.
- Instructions for invoicing BHS were sent to the System of Care on Thursday 9/26/2024



Reports

Updates and Information

- BHS has formed an internal Reports Committee to prioritize report creation, determine gaps in the system, and advise on needed reports
- We will be soliciting input from the Advisory Group on prioritization and need
- State reporting data cleanup and readiness is in progress
- An initial reports crosswalk has been posted on the Optum website



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Help Desk, Issue Reporting, Resources

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:** (**Note the New Email Address**): If you know you need to submit an ARF, complete the ARF form and send directly to MIS at BHS_EHRAccessRequest.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 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):

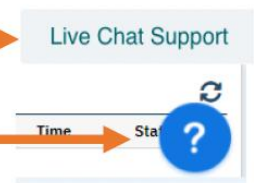
Monday – Friday, 7:00am – 7:00pm

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:

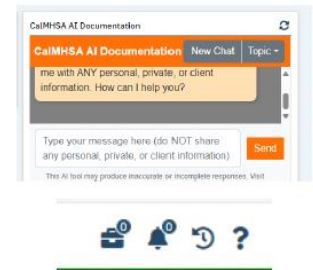
- Use the **search box** on the bottom of the navigation links to search the entire CalMHSA library, or
- Use **Ctrl + F** on your keyboard to search for key words within the **Documentation** sections.



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.



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**.
 - Resources will be updated accordingly with new project details as they become available



SmartCare Town Hall: December

December 17, 2024

2:00 pm – 3:00pm

Join via MS Teams



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Q&A
