



Mental Health SOC EHR Implementation Town Hall

April 30, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



Meeting Goals



Transparency



Engagement



Inclusion



Preparation



LIVE WELL
SAN DIEGO

Meeting Agenda

A Quick Recap

Project Updates

Training

CalMHSA's SmartCare Website

SOC Actions

SOC Resources

Q&A



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Quick Recap

What did I miss in the last town hall?



Recap

What did I miss in the last town hall?

For the SUD SOC, BHS is halting the implementation of SanWITS and pivoting to SmartCare, meaning both the MH and SUD SOC will use SmartCare as their EHR.

SmartCare meets 42 CFR Part 2 privacy requirements and includes a robust consent management tool which improves care coordination.



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Recap

What did I miss in the last town hall?

CCBH training will end on or before June 30, 2024.

Paper will need to be utilized during the transition to SmartCare for new providers; Information necessary to be entered to ensure billing will need to be entered into CCBH.

A glimpse of the CalAIM BHA and report types were shared and are available on the Optum website in the 3/19 town hall slides.



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Project Updates

Important Information about the SmartCare implementation



SmartCare Project Timeline

High Level Project Phases & Planned Start Dates

	SmartCare project kick-off:	January 2024
	Project planning, analysis, system configuration:	February - June 2024
	Testing (workflows):	April 2024 – June 2024
	Data conversion:	April 2024 – June 2024
	Testing (converted data):	June 2024 – August 2024
	Training :	July 2024 – August 2024
	Go live:	September 2024



MH SOC Participation

MH providers are well represented, with good progress made!

More than 80 SMEs now have access to the “sandbox”, which means they can begin testing SmartCare.

MH SME “deep dives” began this month as part of a workflow gap analysis.





Training

Navigating CCBH Training and Preparing for SmartCare Training



Navigating Training July - August

New Hires

For new hires after 7/1/2024 when training ceases:

Assessments and Progress Note narratives must be completed on paper using the CalMHSA downtime forms.

Billing and all workflow prerequisites to billing (e.g., demographics form, open assignment, insurance, etc..) will need to be completed in CCBH



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CCBH Training: New Prescriber Access

How will new prescribers continue to access training after 6/30?

AB 2789 in January 2022 required all prescribers to e-prescribe exclusively beginning on their first day of employment.

MH MIS currently offers a self-train Doctor's Homepage (DHP) option independent of Optum's DHP training dates

This process will continue after CCBH training ceases, and before SmartCare is live.



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Summary: Navigating Training

Use of downtime forms after CCBH training ceases

WHO	Start	Stop	Continue
New hires after 7/1	<ul style="list-style-type: none">• Use paper downtime forms on CalMHSA site: click here• Block time for and/or sign up for SmartCare training in preparation for go-live	CCBH Training: it is no longer required for onboarding.	Prescribers? You will still e-Rx in CCBH. Take the online prescribers modules.
Current employees using CCBH starting on 7/1	<ul style="list-style-type: none">• Block time for and/or sign up for SmartCare training in preparation for go-live	N/A	Continue using CCBH until SmartCare go-live

***Detailed guidance is in development and will be shared with the SOC*



Preparing for SmartCare Training

The SmartCare project team is developing training plans for the SmartCare go-live and considering virtual vs. classroom training options

We have developed a survey to help the team assess SOC training needs for the September go-live; specifically, to gauge interest in video vs. in person training



SmartCare Training

Video Tutorial Training vs. Classroom Training

Video Tutorial Training	Classroom Training
<i>Ideal for learners who:</i>	<i>Ideal for learners who:</i>
Have experience with an EHR (i.e., understand how to search for clients in an electronic database, and complete digital forms.)	Do not have experience with an EHR (i.e., currently use paper processes and/or are new hires.)
Are self-directed/self-motivated, can work independently, and can follow through to the completion of a task without external support.	Like the classroom experience and appreciate an instructor walking them through a process and managing the delivery of information in real time.
Want to learn on their own schedule and at their own pace.	Want a structured schedule where everyone follows along step-by step as a group.
Prefer to consult written resources or figure things out on their own when "stuck."	Prefer to have an expert available live, and in person for help in real time when "stuck."
Enjoy learning at their own pace, individually.	Enjoy learning as a collective group, socially.
Prefer video-based tutorials when learning something new (like watching YouTube videos) with <i>no hands-on learning</i> .	Prefer <i>interactive hands-on learning</i> practicing the same process steps in a training/testing environment as in the "real" environment.
Do not need validation or confirmation.	Desire immediate feedback from an instructor.

SmartCare Training

Seeking your feedback!

<https://forms.office.com/g/U2manv0F18>

When you complete the survey, please copy and paste the link into an email to share with your staff for completion



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CaIMHSA's SmartCare Website

Tools and resources available to you now





SOC Actions

What can you do now to prepare?



SOC Actions

What should the SOC do now to prepare?

- **Continue to identify who at your locations can serve as site lead**
 - All SOC facilities should begin to identify potential site leads
 - BHS will provide guidance on sharing site lead contact information as project planning proceeds.
- **Review hardware, software, and network requirements** and assess what is needed to prepare for implementation.
- Begin to **plan for go-live at your site**; know your downtime procedures.



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SOC Actions

Seeking your feedback!

- **Share the training survey link with your staff this week** to gather their training preferences:

<https://forms.office.com/g/U2manv0F18>

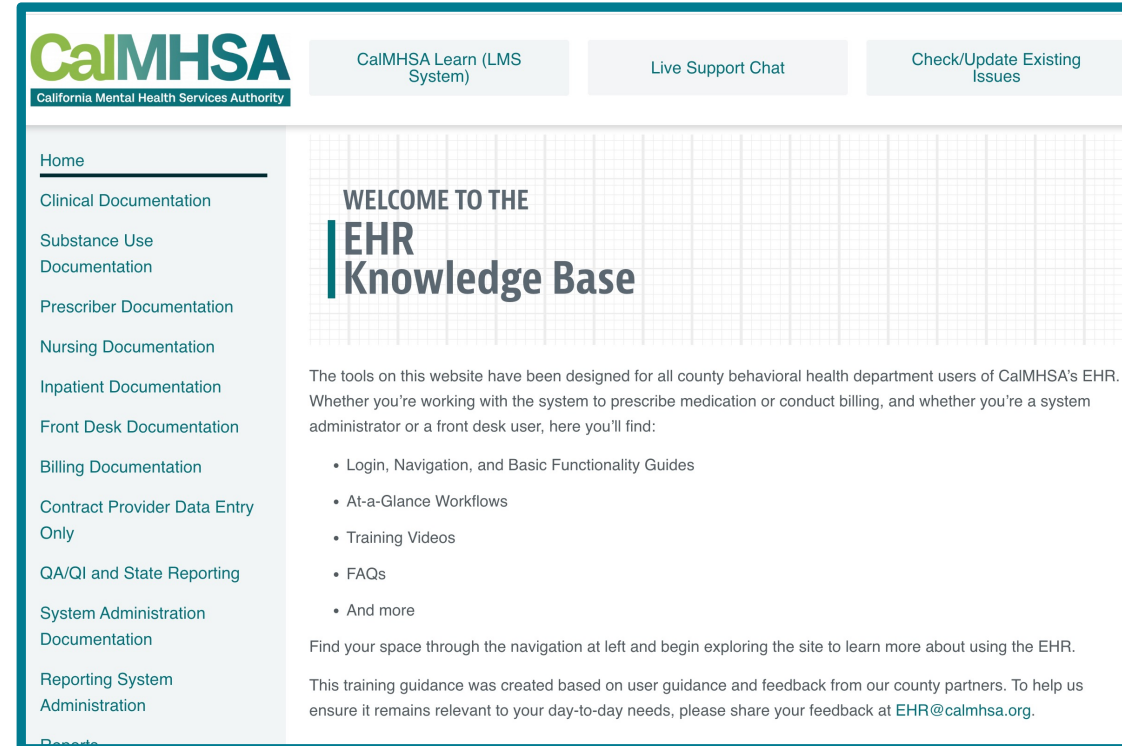


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SOC Actions

What should the SOC do now to prepare?

- **Maintain your awareness** about project status
- **Communicate with your staff** to raise their awareness
- Visit the CalMHSA website to review **SmartCare materials** (<https://2023.calmhsa.org>)



CalMHSA
California Mental Health Services Authority

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

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.





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



SmartCare FAQs

Where can I find resources and information?

- Frequently Asked Questions (FAQs) have been posted (as of 4/10).
- You are encouraged to review (see [this link](#))

SmartCare Implementation

SYSTEM OF CARE (SOC) INFORMATION AND RESOURCES

SOC RESOURCES

Name	Description	Date
SmartCare FAQs as of 4/10/2024 (pdf)		2024-04-25
SmartCare Hardware, Software and Network Requirements - March 2024 update (pdf)		2024-03-18

INFORMATION NOTICES

Name	Description	Date
2023-11-17 BHS Provider Memo EHR Implementation Update (pdf)		2023-11-28
2024-02-16 BHS Provider memo-EHR Update (pdf)		2024-02-16
2024-03-05 BHS Provider Memo EHR Update (pdf)		2024-03-06
2024-04-04 SmartCare information notice (pdf)		2024-04-08

TOWN HALL POWERPOINT PRESENTATIONS





Q&A

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

Or go online for more information at: [**Optumsandiego.com**](http://Optumsandiego.com)

