



To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	August 1, 2024
Title	Summary of SmartCare Implementation Updates

SmartCare will be implemented as the electronic health record (EHR) for both the mental health (MH) and substance use disorder (SUD) systems of care (SOC) on September 1, 2024. This information notice serves as a summary of recent guidance shared with the SOC in preparation for go-live.

TRAINING

SMARTCARE EHR TRAINING UPDATES

Required LMS training for the September 1, 2024, SmartCare go-live began on July 15, 2024. All users except residential, crisis stabilization unit (CSU), and e-prescribers, must complete training by August 2, 2024 to be granted go-live access to SmartCare. Required LMS training is role-based and offered on-demand.

Enrollment for supplemental training, designed to provide extra instruction in a live training environment, is now open for optional outpatient and specialty training, which will occur August 5 through August 23, 2024. A SmartCare Training Registration Tip Sheet can be found on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

An updated Training by Role Grid was shared with the SOC on July 30, 2024 and can be found on the SmartCare tab of the Optum website on the [MHP Provider Documents](#) page or [DMC-ODS page](#). Of note:

- Staff who handle billing functions are strongly recommended to take supplemental training
- Program managers and/or other staff who need to know both admin and clinical workflows are strongly recommended to take supplemental training
- **Residential, crisis residential, and CSU users are required to take supplemental training because there is no CalMHSA LMS training or documentation for these modules.** Supplemental training for residential and CSU providers will take place August 26 through August 30, 2024. Enrollment is not yet open.
- The training plan for e-prescribers is being finalized. Prescribers are strongly advised to take the e-prescriber training as soon as available as there may be a gap with future trainings not occurring until 1-2 weeks after go-live. The requirements and timeline will be shared as soon as available.

For More Information:

- Check the SmartCare tab on the Optum website under [MHP Provider Documents](#) for the MH SOC or [DMC-ODS Provider Documents](#) for the SUD SOC.
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REQUIREMENTS AND FUNCTIONALITY

CHANGES TO UNIFORM RECORDS MANUALS

There are numerous forms built into SanWITS and CCBH that the SOC must complete. In SmartCare, there are significantly fewer forms. As a result, BHS is planning to sunset multiple existing forms, and create new forms to align with SmartCare data entry. The old forms are currently being compared with the new forms, with a crosswalk of expected changes to be released later this month.

SMARTCARE SCHEDULER

“Scheduler” is SmartCare’s scheduling system. **The BHS project team strongly recommends that outpatient providers (not including those billing bed days) use the SmartCare scheduling functionality.** Use of Scheduler reduces ongoing clinical data entry burden and is needed to enter and track non-billable time to maximize system alerts, reminders, and dashboards. Finally, use of Scheduler is assumed for in all LMS trainings; LMS trainings do not exist for manual service entry. Programs not using Scheduler:

- Will not show as having availability to take new clients.
- Will not be able to send telehealth and appointment reminder messages.
- Will not be able to use the Roadmap for Referral Process.

SMARTCARE DATA MIGRATION

The last data migration from CCBH and SanWITS into SmartCare before go-live is client data entered through approximately August 16 through August 20. This means that there are potentially 10-15 days of data that programs must enter in CCBH and SanWITS, and then re-enter into SmartCare after go-live. Of note:

- Essential demographic information on all clients since 2018 and most older clients will be migrated directly into SmartCare from SanWITS.
- Essential demographic information on all clients (including Insyst) plus open authorizations and scheduled appointments will be migrated directly into SmartCare from CCBH.
- Active diagnoses will be migrated; however, a review of diagnoses will be necessary and may need to be re-entered.
- For CCBH, problem lists, allergies, inactive diagnoses, and medications from the past two years will be available via clinical pdfs to lessen the need to move between SmartCare and legacy systems at go-live. Data will still need to be entered into SmartCare.

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The table below summarizes the known or approximate data migration details as of July 27, 2024.

Data Type & System of Origin	Location in SmartCare	Data Delta (Gap)	What This Means
Essential demographic and active diagnosis data for all CCBH clients, including Insyst clients. Includes CCBH client ID, open authorizations and scheduled appointments.	Into these same fields/screens inside of SmartCare	Data pulling only through ~Aug 16-20	These data fields, if entered after this date, will not be migrated into SmartCare until mid-September. Dual data entry may be needed.
Essential SanWITS demographic and active diagnosis information on all clients since 2018, and most other older clients.	Into these same fields/screens inside of SmartCare	Data pulling only through ~Aug 16-20	These data fields, if entered after this date, will not be migrated into SmartCare until mid-September. Dual data entry may be needed.
CCBH inactive diagnoses, medications and allergies from past 2 years.	Into SmartCare 'Clinical Care Document' PDF folder	Data pulling through ~Aug 25	These PDFs are available to lessen the need for staff to move back and forth between SmartCare and legacy systems at go-live. However, this data still needs to be entered into the appropriate screens in SmartCare. There also may be a clinical need to review CCBH for information entered within a week of go-live. PDFs for the last week of August will be migrated mid-September.
Most recent Behavioral Health Assessment (Adult/Child), Crisis Stabilization Summary, Mobile Crisis Assessment, Discharge Summary if within past 2 years.	Into SmartCare PDF Folder	Data pulling through ~July 31	These PDFs are available to lessen the need for staff to move back and forth between SmartCare and legacy systems at go-live. However, this data still needs to be entered into the appropriate screens in SmartCare. There also may be a clinical need to review CCBH for information entered within a week of go-live. PDFs for the last week of August will be migrated mid-September.

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ACCESS TO LEGACY SYSTEMS

Access to SanWITS and CCBH will continue to be available at go-live but will eventually become view-only. Services and claims started in the legacy systems will be completed in the legacy systems.

PREVIOUSLY SHARED GUIDANCE

- **Hardware Software, and Network Requirements – March 2024:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Client Insurance Entry Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Entry of CANS and PSC into SmartCare Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **SmartCare Data Migration Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **CCBH Training and Documentation Guidance**, summarizes program actions for both new hires and current CCBH users after June 26, 2024.
- **SanWITS Training and Documentation Guidance**, summarizes program actions for both new hires and current SanWITS users after July 17, 2024.

GO-LIVE PREPARATIONS

SITE LEAD PREPARATION

640 site leads were identified by the SOC. A kick-off meeting was held on July 17, 2024 and site lead training is taking place July 29 through August 2, 2024. Site leads can provide support to each program in several ways:

- Prior to Go-Live
 - Assist programs in monitoring mandatory training compliance and follow up with any deficient staff.
 - Assist in sharing information with staff about supplemental training opportunities and encouraging registration.
 - Explore the CalMHSA website and print any documentation that may be useful or create a document with links for the program team.
 - Communicate relevant information to team members.
- During Go-Live
 - Check in with EHR users through the day to help triage issues or direct staff to resources.
 - Share resources and tools to self-manage questions and support needs.

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- Report and escalate urgent or recurring issues.
- Communicate relevant information to team members.
- After Go-Live
 - Participate in a project debrief on September 17th.
 - Participate in follow up check-ins at 30, 60, and 90 days after go-live.

If you have questions related to the site lead role or preparation, please reach out to Timmy Paraskevopoulos, the site lead point of contact, at Politimy.Paraskevopoulos@sdcounty.ca.gov.

CONSIDERATIONS FOR GO-LIVE PREPARATION

The following considerations are intended to help you prepare your site for go-live

1. **Know your go-live date.** Based on your hours of operation, go-live will be on September 1, September 2 (Labor Day), or September 3.
2. **Track mandatory training completion** and encourage optional supplementary training participation.
3. **Know your downtime procedures** and ensure your program management and site leads are prepared for go-live at each facility.
4. **Orient new hires on downtime forms** after CCBH and SanWITS training ceases and before SmartCare go-live.
5. **Be prepared for on-site login support;** this is one of the most frequent issues during a go-live.
6. If applicable, **print the schedule for the next two weeks** and consider printing Fact Sheets or Client Profile.
7. **Know where to go for help** and leverage the extra knowledge gained by site leads through their participation. Site leads will receive guidance summarizing where to go for help depending on the situation.

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MANAGE EXPECTATIONS

In communication with staff, it is important to manage expectations. The following messages may be helpful in your on-site preparations.

- Go-lives are always bumpy rides
- You (and everyone else) will not be an expert at go-live
- No one will feel comfortable or like they “know what they are doing”
- Expectations and reality may be at odds
- We may need to pivot or change course; prepare yourself and others for the inevitable
- Be optimistic and be resilient: frustrations will run high

ADDITIONAL INFORMATION

WHAT ELSE SHOULD THE SOC DO NOW TO PREPARE?

- 1. Maintain your own awareness about project status to prepare for SmartCare go-live.**
 - This includes continued review of status updates and other materials available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website, participate in town halls, and discussions with your COR or supervisor.
- 2. Communicate early and often with your staff** to raise awareness about the magnitude of change they can expect.
- 3. Review the SmartCare FAQs.**
 - Numerous questions have already been asked via SmartCare town halls and other venues.
 - Please review these FAQs, available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website.
- 4. Visit the EHR Knowledge Base on the [CalMHSA website](#).**
 - Numerous tools are available on the website for your review to begin familiarizing yourself with the SmartCare product. You will find training guides, videos, at-a-glance workflows, FAQs, and more.
 - Providers are strongly encouraged to review these materials.

KEY UPCOMING DATES

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SOC Town Hall (Virtual)

- **August 13, 2024** | 11:00am - 12:00pm [Click here to join this meeting](#)
- **August 27, 2024** | 1:00pm – 2:00pm [Click here to join this meeting](#)

Training

- **July 15 – August 2, 2024** | Required SmartCare LMS Training
- **July 29 – August 2, 2024** | Site Lead Training
- **August 5 – August 23, 2024** | Optional Supplementary SmartCare Classroom or Online Virtual Training
- **August 26 – August 30, 2024** | Required Supplementary SmartCare Classroom or Online Virtual Training for residential or CSU users
- **September 1 – September 6, 2024** | Optional SmartCare Classroom or Online Virtual Support

Go-Live

- **September 1, 2024**

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