



SmartCare User Group

County of San Diego

Health and Human Services Agency

Behavioral Health Services

March 26, 2025

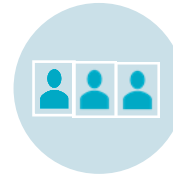
Meeting Goals



Transparency



Engagement



Inclusion

Meeting Agenda



- Meeting Goals
- Clinical Updates
- MIS
- Data Sciences
- Billing Unit
- Q&A



CaMHSA Rx – new Widgets

- Update to CaMHSA Rx
 - Pushing data from CaMHSA Rx to two new widgets: Active Medications & Allergy widgets
- Original release date 3/17 & 3/18 – CaMHSA delayed implementation until 3/24 & 3/25
- Widgets ONLY available to those with access to CaMHSA Rx and the Psych/Medical Note template
 - Medications & allergies to flow from CaMHSA Rx into SmartCare
- As of Tuesday 3/25: the following screens were populated with CaMHSA Rx data:
 - Active Medication Widget
 - Allergy Widget
 - Psych/Medical Note history (note can be opened for visibility by all who have clinical visibility access)

CaMHSA Rx Current Access for Prescribers & RNs

- Escalated need for LVNs, LPHAs, etc to have visible access and capabilities to add “home medication”
- CaMHSA recently provided us with different paths for access
 - We are currently testing the 3 different paths
 - There are significant concerns to what CaMHSA has suggested
 - Paths being taken to the Exec team today for discussion

Clinical Updates



Batch Uploading

- Internal testing has been done – ticket was escalated due to results. GOOD NEWS!
- Now functioning as intended
- If you are a program who does not use SmartCare for documentation of services, we will be working to establish this process

"PENDING" Status – Update

- Allow for a service to be "held"
 - Allows for Supervisors & staff to edit/change note prior to overnight job running
 - Allows for editing of entirety of note, including service details
 - MUST change to "show" when complete
- **Supporting workflow posted on Optum Friday 3/21 (SC tab-Workflows)**
 - Addresses the removal of diagnosis when moving from Pending to Show
 - Incomplete Note workflow
 - Note to be Reviewing by Another Staff workflow

Overnight Job delay – Notice released Friday 3/21, LIVE Monday 3/24

- Allows for the automatic pull of services from "show" to "complete" status to be delayed by a set amount of days
- Timeframe is based off **date of service**
- Implemented a 3 day window
 - Providing additional time allotted for programs to edit services
 - Applicable to both Outpatient and Residential programs

Advisory Group: SmartCare Access Optimization Pilot

- Purpose:
 - Intended to improve role-based access and strengthen control in the SmartCare system
 - Improve operational efficiencies and ensure appropriate system access for different user types
- Expectation:
 - All staff roles in project to perform testing in QA, using provided scripts and test internal program workflows with focus on day-to-day operations
 - Attend recurring in-person meetings with Project Team to engage in active discussion
 - Connect directly with Project Team to work through issues/concerns together

Clinical Updates



- UPDATED NEED: Additional testers requested
 - 3 Testers- **Same program**
 - 1 admin or front desk staff, 1 clinical staff (who does not supervise), 1 Program Manager
 - All 3 staff *MUST* have these levels of access in LIVE as this testing will start in QA but move to LIVE
 - ** Specific ask is for 2 SUD Outpatient programs
- If interested contact Bryan Bagnas: bryanb.bagnas@sdcounty.ca.gov by COB Thursday 3/27
- We will be sending out emails to confirm attendance by April 1.



SmartCare User Group: MIS

Rebecca Ferry-Rutkoff, Adrian Escamilla, Cheryl Lansang

Resources

Ongoing Support

- CalMHSA Knowledge Base is available at <https://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:

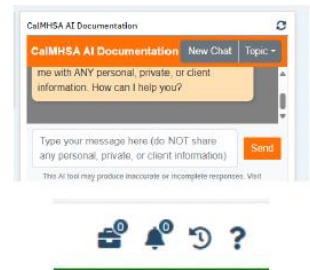
- Use the **search box** on the bottom of the navigation links to search the entire CalMHSA library, or
- Use **Ctrl + F** on your keyboard to search for key words within the **Documentation** sections.



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.



Issue Reporting & Questions

Inquiry Routes for SmartCare issues and questions



Issue or Need	Resource
System issues: i.e. glitches, functionality issues, pop up errors	Follow the CalMHSA help desk communication process (see help desk flyer)
SmartCare ARF submission + any access related issues / questions	BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
Support questions & escalations that cannot be addressed by the CalMHSA Help Desk	BHS_EHRSupport.HHSA@sdcounty.ca.gov
Documentation, guidelines or policy related questions	QIMatters.HHSA@sdcounty.ca.
Billing Issues or Questions that can't be addressed by the CalMHSA Help Desk	MHBillingUnit.HHSA@sdcounty.ca.gov ADSBillingUnit.HHSA@sdcounty.ca.gov MH Billing line: 619-338-2612 SUD Billing line: 619-338-2584
Reports & Data Centralized E-mail support:	BHS-DataScience.HHSA@sdcounty.ca.gov

Support Ticket Updates

MIS Updates and Information

- CalMHSA is transitioned to a new support platform – HubSpot
 - More efficient ticket routing & support
- **Live Chat:** at 2023.calmhsa.org chat bubble for immediate assistance
- **Support Ticket:** 2023.calmhsa.org/support complete a support form
- **Customer Portal:** Register for a Customer Ticket Portal Account at <https://ehr-support.calmhsa.org/tickets-view>

SmartCare Help Desk Support



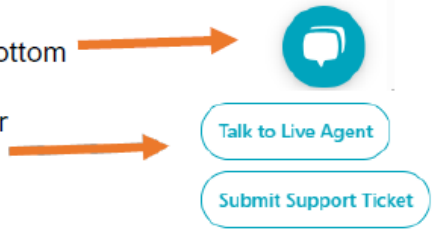
Beginning March 1, 2025, SmartCare support for system issues is offered by CalMHSA during normal business hours (in order of preferred contact):

Monday – Friday, 8:00am – 5:00pm

Connect via Live Chat or Submit a ticket

Both can be accessed via:

- Go to 2023.calmhsa.org
- Click on the blue bubbles on the bottom right corner of the screen
- Choose either Talk to Live Agent or Submit Support Ticket



OR

- Go to SmartCare EHR log in
- Click on the blue question mark on the right bottom corner of the screen when logged into the SmartCare HER
- Begin Chat process



Once a ticket is submitted: Register for a Customer Ticket Portal Account

- Visit <https://ehr-support.calmhsa.org/tickets-view>. No tickets will show until submitted.

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

Updated March 5, 2025

Process for Escalating Tickets

MIS Updates and Information



- Help Desk support Hours
 - 8-5 M-F
 - Log Ticket through Portal 24 x's 7
 - After Hours support is for System Outages
 - call CalMHSA at (916) 214-8348
- Upcoming Holiday Support – 3/31/25 Cesar Chaves Day
 - **Live Chat through CalMHSA NOT Available**
 - Password Reset Support
 - Self service password reset link
 - **6a-6p call (800) 834-3792 – Holiday Only**
- Continued effort to improve the Help Desk experience

Support Ticket Updates MIS Updates and Information



- **Common Issues Reported to Help Desk:**
 - Access lock out
 - Use self-service password reset feature
- Help Desk Ticket Summary
 - Opened and Resolved
 - Avg 1,565 per month
- Aging Tickets
 - Pending Resolution
 - Approx 80

A screenshot of the Streamline Healthcare Solutions, L.L.C. login interface. The form includes a "Username" field with a person icon and the placeholder "Enter Username", a "Password" field with a lock icon and the placeholder "Enter Password", a "Remember me" checkbox, a "LOGIN" button, a "Forgot your Username?" link, and a "Forgot your Password?" link. The "Forgot your Password?" link is highlighted with an orange box and an arrow pointing to it from the right.

Process for Escalating Tickets

MIS Updates and Information



- Criteria for escalation of a ticket:
 - Resolved email but issue not resolved
 - No response after 1 business week
- Process for escalation of a ticket:
 - Forward the email that includes the ticket number to MIS Support
 - Indicate which of the escalation criteria has been met

SmartCare Access & ARF Processing

MIS Updates and Information



- ARF Updates:
 - ETA significantly reduced, goal is 4-5 days
 - Continue to prioritize & reallocate resources
- Ensuring correct ARF completion will help avoid delays
 - Common errors:
 - Incomplete forms, missing fields, missing user roles
 - Handwritten forms
 - Full program name
 - Incorrect taxonomy number
 - Incorrect or old form
- Send completed ARF's to: BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov

Priority Issues

MIS Updates and Information



- Privacy and compliance concerns
- Billing Errors
- Service Completion Process
- Home Med Entry & Viewing Medication History
- State Reporting
- Role/Access clean-up/optimization



Reporting in the SmartCare Era

Derek Kemble – Data Sciences

Report Training and Resources



- Current Efforts
 - Optum SmartCare Training
 - SmartCare Help Desk Support
 - SmartCare ARF: Treatment Programs
 - Centralized E-mail support: BHS-DataScience.HHSA@sdcounty.ca.gov
- Future Efforts
 - SmartCare Reports Manual
 - SmartCare Report Development Tracker
 - Additional Trainings



CoSD SmartCare Reports



Report Name	Status
CoSD Active Clients Report	Completed
CoSD Admissions Morning Report	Completed
CoSD Admissions, Discharges, and Census Report	Completed
CoSD Aftercare Discharge/Summary Report	In Queue
CoSD Authorizations Report	In Progress
CoSD Caseload Report	On Hold
CoSD Charges/Claims Report	Completed
CoSD Client Demographic Data Report	UAT
CoSD Client Insurance and Date Span Report	Completed
CoSD Client Services Report	Completed
CoSD Client Services Report (Version 2)	UAT
CoSD Open Enrollment and Last DOS Report	In Queue
CoSD Progress Note Timeliness Report	Completed
CoSD Reported Errors Report by Program	In Queue
CoSD Staff Productivity Report	In Queue
CoSD TADT Report	Completed
CoSD Unsigned Documents Report	UAT
CoSD Service Error Report	Completed



BHS Billing Announcements/Reminders

Tess Bugay and Carmen Saline

03/26/2025

Service Errors Affecting Billing



- Billing Diagnosis required for completing the service
- Required authorization for the same program missing
- Financial information has not been completed for this client
- ICD10 Code '####.##' is not valid for FY2025
- ICD10 Code '####.##' is not value for FY2024
- End Date does not equal Start Date

Client Insurance Plan Request Form



SmartCare CLIENT PLAN REQUEST

Client Name & ID#: 123456789

Program Name: CRF

Client's DOB (to verify): [REDACTED]

Submitted By: [REDACTED] Date: 10/14/2024

New Client Plan **Update Existing Client Plan** (to indicate coverage change or expiration date)

Check the coverage plan that applies to the client.

Primary Health Plan	Insured ID (Policy#, CIN)	Effective Date	Expiration Date
Choose an item.			[REDACTED]

IMPORTANT: Please provide brief description or justification if/when choosing "County (MC) MH Administration" or "County Billable SUD" plan.

SUD NTP METHADONE-DAY SERVICE



- Methadone-Day Service (H0020) must be entered in SmartCare one service date at a time with service time as “1 unit”.
- The data range entry for Methadone-Day Service is currently not permitted on SmartCare's service detail screen. The end date will always be equal to the start date.
- The service time fields are not grayed out. It is not recommended to enter more than 1 unit for a Methadone-Day Service.
- The State will deny the H0020 claim with the N345 code (units billed does not equal the date range) if the total units of service (UOS) does not match the service date.
- Please do not enter two (2) H0020 with the same date of service in SmartCare. The State will deny both claims.

SUD NTP METHADONE-DAY SERVICE



Correct format:

Service Detail

Service Detail | Billing Diagnosis | Authorization(s)

Service

Client... [REDACTED] Status Complete Start Date 09/30/2024 Program Acadia NTP Fashion Vllly

Procedure Methadone - Day Service Start Time 10:23 AM Service Time 1 Units

Clinician Name Sahakyan, Martin End Date 09/30/2024

Location Non-residential Opioid Trtmt Attending Referring

Client was present (unused) Other Person(s) Present Cancel Reason

Group... Charge \$33.75 Balance \$ 33.75 Rate ID 10216612

Billable Do Not Complete

Mode Of Delivery Face-to-face



Q&A

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

Or go online for more information at: Optumsandiego.com

NEXT MEETING: April 14, 2025 10-11am