



MH and SUD SOC SmartCare Town Hall

July 29, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



Meeting Goals



Transparency



Engagement



Inclusion



Preparation



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Meeting Agenda

Recap

Timeline and Participation

Functionality and Requirements

Training

SmartCare Site Leads

Go-Live Preparations

SOC Actions

SOC Resources

Q&A



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Recap

What did I miss in the last town hall?



Recap

What did I miss in the last town hall?

Some data points can not migrate to SmartCare and will need to be entered at go live for clients. This includes medications and problem lists.

Review of diagnoses will be necessary

Documentation in SmartCare is more efficient than in CCBH or SanWITS

In SmartCare, users can set up due dates for documentation, for example due dates for assessments or outcome measures

SmartCare has better care coordination capabilities, for example, referral processes and coordination between the SUD and MH systems of care



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Recap

What did I miss in the last town hall?

BHS is planning to migrate minimal demographic information on every client currently in CCBH or SanWITS into SmartCare for go-live, with additional clinical information for a smaller cohort of clients.

“Scheduler” is SmartCare’s scheduling system. BHS strongly recommends that outpatient providers (does not include those billing bed days) use the SmartCare scheduling functionality

SmartCare training will occur via both required and optional training

Site leads were identified by the SOC to support go-live at each site



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Timeline & Participation

High-level Information about the SmartCare implementation



SmartCare Project Timeline

Key Dates

	Site Lead Kick-Off Meeting	Jul 17
	Required CalMHSA LMS Training	Jul 15 – Aug 2
	Site Lead Training	Jul 29 – Aug 2
	Data Migration	Now – Aug 21
	Optional Supplemental Training	Aug 5 – Aug 23
	Required Supplemental Training (Residential / CSU)	Aug 26 – Aug 30
	Required e-Prescribing Training (DrFirst)	Late Aug TBD
	Go live:	Sep 1 – Sep 3

SOC Participation

How is the SOC participating in the SmartCare project?

More than 600 site leads were identified by the System of Care to support go-live

Approximately 500 attended the July 17 kick-off meeting

292 site leads have signed up for site lead training this week.

Optum trainers held office hours July 15 – July 26 to assist with logins and account creation; 342 participants attended.



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Functionality and Requirements

Recent Guidance and New Information



CCBH / SanWITS Training and Use of Downtime Forms

Guidance released 7/1/2024

CCBH and SanWITS training has now ceased and is no longer required for onboarding; New hires should use current applicable CCBH or SanWITS downtime forms available on the Optum website

If programs have a newly onboarded staff who needs access to SmartCare, email the MIS team at BHS_EHRProject.HHSA@sdcounty.ca.gov

A new Access Request Form (ARF) will be completed around August 9.

At this time, the process will revert to the current process, but with the new form

QA downtime forms for SmartCare are being finalized now and will be ready for go live; QA is developing a grid to show the changes in the forms.



CANS/PSC Entry

Guidance released July 18, 2024

Providers who currently enter the CANS and PSC into the mHOMS will begin entering into SmartCare at go-live. Benefits include:

Assessments will be shorter and data entry time should decrease

PSC can be completed by parents via a touch pad

Alerts and reminders available for assessment due dates

Viewable by other programs, increasing care coordination



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Client Insurance Entry

Guidance Released 7/18/2024

Providers who currently enter insurance plans into CCBH and SanWITS will NOT be responsible for entry into SmartCare at go-live

Due to access restrictions in billing functionality, BHS Fiscal Billing Unit will enter and manage Client Insurance Plans in SmartCare

At go-live, contract providers must submit a client insurance plan request form for new or existing clients with other healthcare coverage besides Medi-Cal

Completion of UMDAP will still be the responsibility of providers



SUDURM / UCRM

Changes to Uniform Records Manuals

- There are numerous forms built into SanWITS and CCBH that the SOC must complete; SmartCare has significantly fewer
- BHS is planning to sunset multiple existing forms
- BHS is also creating new forms to align with SmartCare data entry
- Currently, the old forms are being compared with the new forms, with a crosswalk expected in August



Data Migration

Timeline and Data Re-entry

The last data migration from CCBH and SanWITS into SmartCare before go-live is currently client data entered through approximately August 16 – August 20.

This means that there are potentially 10-15 days of data that programs must enter in CCBH or SanWITS, and then re-entered into SmartCare after go-live.

The County realizes this is a significant burden and is attempting to shorten this timeline.



Data Migration: Demographic Data

Guidance released 7/18/2024

Minimal demographic information on clients currently in CCBH or SanWITS will be migrated into SmartCare for go-live.

SanWITS: Minimal demographic information on all clients since 2018 and most other older clients

CCBH : Minimal demographic information on all clients (including Insyst) plus open authorizations and scheduled appointments



Data Migration

Diagnosis, Allergies, Meds, Problem List

Diagnoses are being migrated, however review of diagnoses will be necessary

In SmartCare, diagnoses are stored at the program level versus client level, so information available in the legacy systems may not be available

Diagnosis may need to be re-entered

For CCBH, problem lists, allergies, and medications are *not being migrated but will be available via clinical PDFs*



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CCBH PDFs will be available for data that cannot be directly migrated into SmartCare

Important: You will still have access to view information in the legacy systems at go-live

- All Medications, Diagnoses, and Allergies for all open clients and those closed within the past two years
- Clinical documentation within the past two years, including the most recent:
 - Discharge Summary
 - Behavioral Health Assessment (BHA) (Adult and Children)
 - Mobile Crisis Assessment
 - Crisis Stabilization Unit (CSU) Episode Summary



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.

Access to Legacy Systems

Will I still have access to SanWITS and CCBH?

- Yes! Access to SanWITS and CCBH will still be available at go-live.
- Access will eventually change to view only
- Services and claims started in legacy system will be completed in legacy systems.



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SmartCare Scheduler

Will we be required to use the SmartCare Scheduling System?

“Scheduler” is SmartCare’s scheduling system

The BHS project team is **strongly recommending that outpatient providers** (does not include those billing bed days) **use the SmartCare scheduling functionality**



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SmartCare Scheduler

Why is Scheduler recommended for outpatient Providers?

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

Reduces ongoing clinical data entry burden

Is assumed for and used in all LMS Training - *LMS trainings do not exist for manual service entry*

Is needed to enter and track non-billable time to maximize system alerts, reminders, and dashboards



Interoperability

Will there be interoperability with other EHRs?

Interoperability is the ability to access and share a patient's clinical information no matter where it is stored or how it is formatted.

SmartCare has interoperability planned to meet legislative timelines, but it will not be made available at go-live.

Additional detail on specific interoperability functionality will be provided as it becomes available.



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Follow Up on Provider Questions

Does SmartCare include functionality to document medication dispensing (i.e. OTP requirements)?

No, OTPs will continue to document primarily in their own systems, like they do now, and record minimally necessary information in SmartCare

Will individuals providing clinical supervision obtain access to SmartCare?

No, access to SmartCare will be provided using the same guidelines as are currently followed regarding CCBH and SanWITS. These individuals do not have access to our legacy systems and likewise will not have access to SmartCare.



Additional Information Under Review

Provider Pain Points

- CSU and Residential programs may need to enter bed assignments at go-live, although we are trying to avoid this
- Programs not using SmartCare but who currently enter ASAM scores or results into SanWITS will now need to enter ASAM in its entirety into SmartCare
- SmartCare can only tie one email account to each provider's NPI, meaning staff who work at multiple legal entities will need to choose a single email address. More guidance coming soon.



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SmartCare Training

Details, Timelines, Requirements



Required Training

(Jul 15 – Aug 2)

- All Users
- CalMHSA Videos
- Role Based
- Follow Along in Train Domain

Supplemental Training

(Jul 29 – Aug 30)

- Live In-person or Online
- Level II Class
- Structured Agenda with Practice Scenarios
- Optional except for Residential or CSU

**Go-Live:
9/1/24**

Supplemental Training

Details and Timeline

Designed to provide extra instruction in a live training environment

Timeline:

Required Site lead training | Week of July 29 | **Happening Now**

Optional Outpatient and Specialty Training | August 5 – August 23 | **Registration Now Open!**

Required Residential and CSU | August 26 – August 30 | **Registration Coming Soon**

Ensure you have completed the required LMS Training Modules and passed the knowledge checks with a minimum 80% before enrolling

Once you have completed all required CalMHSA LMS Modules for your role, visit RegPack to register for additional training.

SMARTCARE REGPACK



Optional Outpatient and Specialty Training

Registration and Timeline

Training will occur August 5 - 23

Registration is now available!

Currently, a total of 131 classes are available to choose from
83 onsite and 48 online

To enroll, create an account and register for Regpack.

Choose your role and modality to find applicable classes

Choose your course: online and onsite options, various days and times (including night shift.)



SmartCare Required Training Role Grid

SmartCare Role	Description/Scope of Role	CalMHSA Learning Management System (LMS) Moodle Videos Minimally Required LMS Modules by Role					Optional & Required Supplemental Live Training Begins week of August 5. Both in-person (3 hours) or live virtual (90 minutes) options are available unless otherwise noted below.	
Admin Clerical Front Desk (LMS estimate: 2 hrs)	Reception and Data Entry staff who add clients, schedule, and enter services and other non-clinical info. Includes programs who have their own EHR.	SmartCare Basics for All Users	SmartCare for Front Desk Staff	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Request for Services, Screening and Intake and Assessment			Supplemental Live Training is optional.	
Clinical Direct Service (LMS estimate: 3 ½ hrs)	LPHA/Clinicians AND non-LPHA who provide direct services and work under an LPHA, such as substance abuse counselors, and peer support specialists.	SmartCare Basics for All Users	SmartCare Calendar Management for Providers	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Services, Screening and Intake and Assessment b. Life Cycle of a Client: Services	Clinical Workflow Training	SmartCare for Group Service Providers	Supplemental Live Training is optional.	
Prescribers and Nurses (LMS estimate: 4 hrs)		SmartCare Basics for All Users	SmartCare Calendar Management for Providers	SmartCare for Front Desk Staff	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client b. Life Cycle of a Client: Services	SmartCare for Prescribers, Nurses, and Med Support Staff	Supplemental Live Training is optional. Additional, virtual-only e-prescribing specific training will be required and provided later in August. More information coming soon!	
Admin Billing Only (LMS estimate: 90 min)	Staff who handle billing functions for their program, such as clearing of suspense reports or preparing claims.	SmartCare Basics for All Users					Supplemental Live Training is highly encouraged as there is no CalMHSA LMS training specific to program billing workflows. This Training will focus on where to find and enter billing info. Further guidance on billing workflows to be provided by County Fiscal (BHS Billing Units for MH & SUD).	
Program Managers, QA, and CORs Teams* (LMS estimate: 4 ¾ hrs)	Staff who need to know both admin and clinical workflows. *Note COR Team staff should take this LMS track only if they want to take the Supplemental Live Training; they may also follow 'Reporting' track below.	SmartCare Basics for All Users	SmartCare Calendar Management for Providers	SmartCare for Front Desk Staff	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Services, Screening and Intake and Assessment b. Life Cycle of a Client: Services	Clinical Workflow Training	SmartCare for Group Service Providers	Supplemental Live Training is highly encouraged as there is no CalMHSA LMS training specific to managers. This Training will highlight oversight tools in SmartCare, such as dashboards and reporting that will be helpful for those overseeing program operations and integrity.
Residential, Crisis Residential, and CSU (LMS estimate: 90 min)	For program staff who will be using SmartCare as their EHR.	SmartCare Basics for All Users					Supplemental Live Training is required as there is no CalMHSA LMS Training or documentation for these modules. This training will be August 26-30. More information coming soon!	
Read Only (LMS estimate: 90 min)	Users who do not enter data but view and print, such as Jail Social Workers, SDCPH MDs, and medical records staff.	SmartCare Basics for All Users	While staff in Read Only roles may take additional CalMHSA LMS modules to familiarize themselves with the documentation they view, this is not required.				Additional documentation supports for Read Only workflows are coming soon!	
Reporting (LMS estimate: 90 min)	Staff who run reports for their legal entity or multiple entities (i.e., UCSD or COR Teams*)	SmartCare Basics	While staff in Reporting ad Only roles may take additional CalMHSA LMS modules to familiarize themselves with the documentation they view, this is not required.				Additional documentation supports for Reporting processes are coming soon!	

Admin Billing

Details for Staff Who Handle Billing Functions

All users required to take SmartCare Basics LMS (90 minutes)

All users **strongly recommended** to take Supplemental live training as there is no CalMHSA LMS training specific to program billing workflows; This training will focus on where to find and enter billing info.

Further guidance on billing workflows to be provided by County Fiscal (BHS Billing Units for MH & SUD).



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Program Managers

Details for Staff Who Need to Know Admin and Clinical Workflows

All users required to take multiple LMS modules (4 hours 45 minutes)

All users **strongly recommended** to take Supplemental live training as there is no CalMHSA LMS training specific to managers

This training will highlight oversight tools in SmartCare, such as dashboards and reporting that will be helpful for those overseeing program operations and integrity.



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Residential, Crisis Residential and CSU Training

Details and Timeline for Program Staff Using SmartCare as Their EHR

All users required to take SmartCare Basics LMS (90 minutes)

All users **required to take Supplemental live training** as there is no CalMHSA LMS training or documentation for these modules

Training will occur August 26-30

Additional information coming soon!



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SmartCare Site Leads

Site Lead Preparation and Support Before, During, and After Go-Live



Site Lead Preparation

What are the site leads doing to prepare?

Kickoff Meeting on July 17 – more than 500 site leads attended!

Site Lead Training is taking place this week (Jul 29– Aug 2), and includes:

- Includes optional training (admin, clinical, both)

- 1-hour site lead specific training

Resources are being prepared to assist site leads prior to go-live

- Site lead “cheat sheet”

- Go-live prep guidance



Site Lead Support Prior to Go-Live

Site leads can provide support in multiple ways

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 prior to and during go-live



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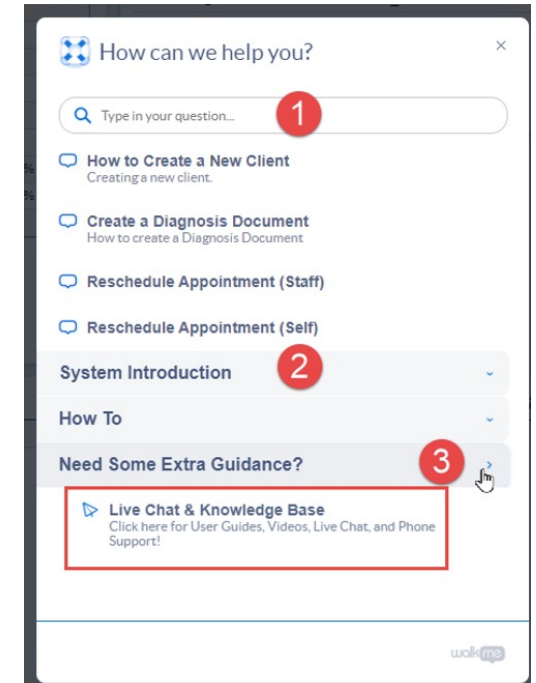
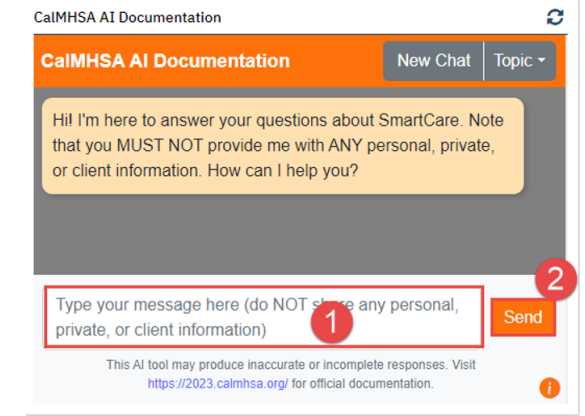
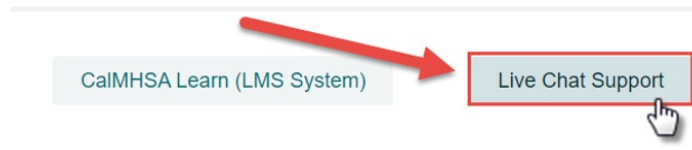
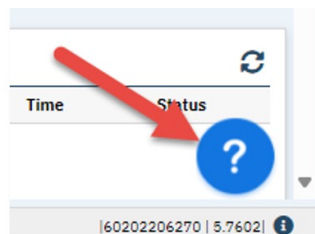
Site Lead Support During Go-Live

Site leads can provide support in multiple ways

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 via integrated help tools like info buttons

Report and escalate urgent or recurring issues reported by users on site via once or twice daily check-in meetings



Site Lead Support After Go-Live

Site leads can provide support in multiple ways

Participate in a project debrief on September 17

Participate in 30-60-90 day check-in



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Go-Live Preparations

What You Can Do Now to Prepare



Go-Live Preparations

Considerations as you prepare for go live

Know your go-live date: Sept 1, Sept 2 (Labor Day), or Sept 3

Track mandatory training completion

Know your downtime procedures

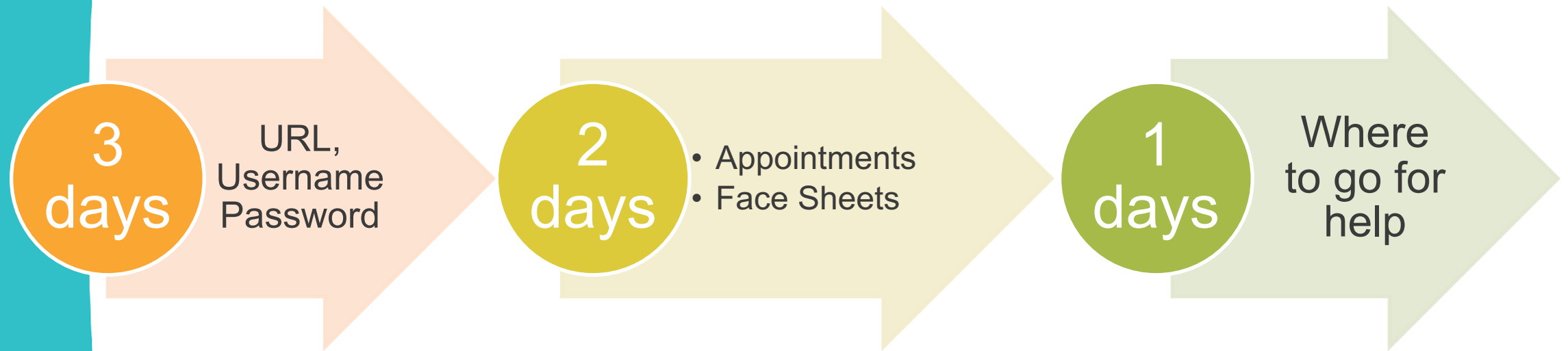
Be prepared for on-site login support (frequent issue at go-live)

The screenshot shows the login interface for Streamline Healthcare Solutions, L.L.C. The page includes a logo at the top, followed by fields for Username and Password. Below these fields are a 'Remember me' checkbox and a 'LOGIN' button. At the bottom, there are links for 'Forgot your Username?' and 'Forgot your Password?'. Red annotations highlight specific elements: a red circle with the number '3' is placed over the 'Remember me' checkbox; a red circle with the number '1' is placed over the 'Forgot your Username?' link; and a red circle with the number '2' is placed over the 'Forgot your Password?' link. A green footer bar at the bottom contains the copyright notice: 'Copyright © 2023 - 2024 Streamline Healthcare Solutions, L.L.C. All Rights Reserved.'



Go-Live Preparations

Considerations as you prepare for go live



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Manage Expectations

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

Fits and starts we may need to pivot or change course; prepare yourself and others for the inevitable.

Be optimistic and be resilient: frustrations will run high



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SOC Actions

What can you do now to prepare?



SOC Actions

What should the SOC do now to prepare?

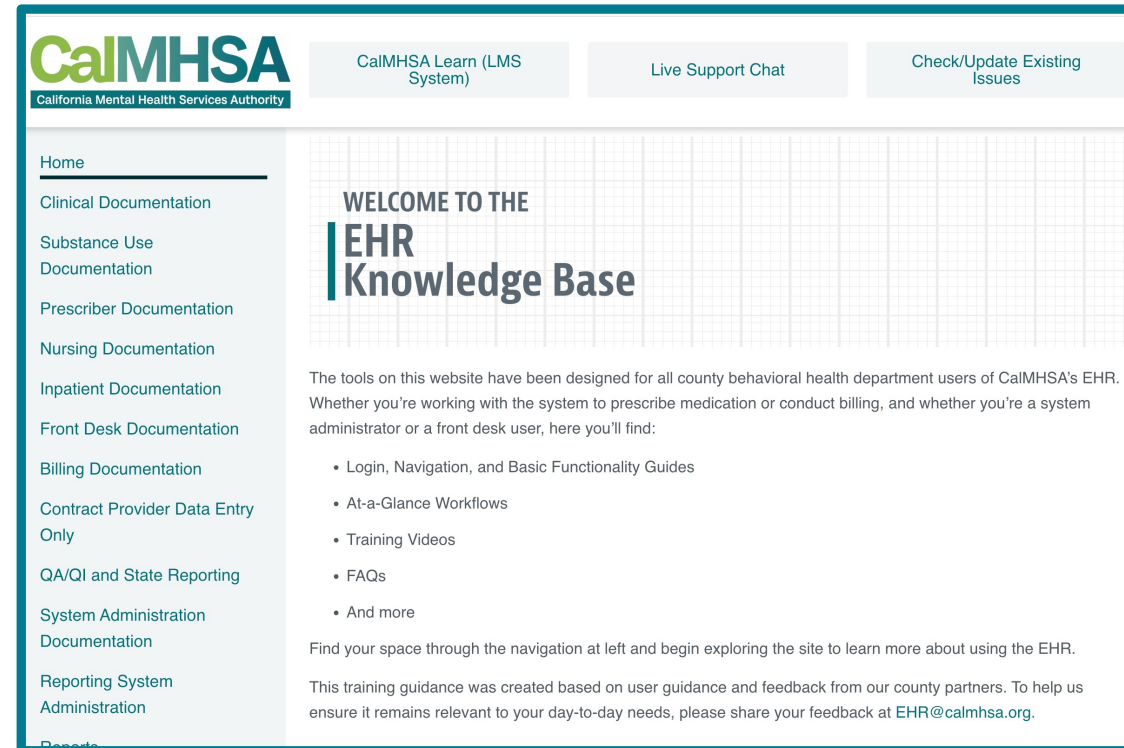
- Ensure all SmartCare users at your site have completed required training. **All required training except Residential, CSU, and e-prescribing must be completed by Friday, August 2 to ensure access to SmartCare at go-live.**
- **Orient new hires on downtime forms** after CCBH and SanWITS training ceases and before SmartCare go-live
- Begin to **plan for go-live at your site**; know your downtime procedures.
- **Ensure your site lead is oriented to onsite plans** for downtime and go-live.



SOC Actions

What should the SOC do now to prepare?

- **Maintain your awareness** about project status
- **Review all guidance and info notices** in preparation for go-live.
- **Communicate with your staff** to raise their awareness
- Visit the CalMHSA website to **review SmartCare materials** (<https://2023.calmhsa.org>)



The screenshot shows the CalMHSA website's EHR Knowledge Base. The header includes the CalMHSA logo (California Mental Health Services Authority) and three utility buttons: "CalMHSA Learn (LMS System)", "Live Support Chat", and "Check/Update Existing Issues". A left-hand navigation menu lists various documentation categories such as Home, Clinical Documentation, Substance Use Documentation, Prescriber Documentation, Nursing Documentation, Inpatient Documentation, Front Desk Documentation, Billing Documentation, Contract Provider Data Entry Only, QA/QI and State Reporting, System Administration Documentation, Reporting System Administration, and Reports. The main content area features a "WELCOME TO THE EHR Knowledge Base" heading, followed by a paragraph explaining that the tools are designed for all county behavioral health department users. A bulleted list of resources is provided: Login, Navigation, and Basic Functionality Guides; At-a-Glance Workflows; Training Videos; FAQs; and And more. A final paragraph encourages users to explore the site and share feedback at EHR@calmhsa.org.





SOC Resources

What happens next?



Next Town Hall

We will host two town halls in August – Join us on the following dates:

August Town Hall 1:

Tuesday, August 13, 2024 at 11:00am

August Town Hall 2:

Tuesday, August 27, 2024 at 1:00pm



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





Q&A

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

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

