



# Electronic Health Record (EHR) Implementation Town Hall

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February 20, 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

A Quick Recap

Project Highlights

Frequently Asked Questions

SOC Engagement & Actions

Q&A





# Quick Recap

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What did I miss in the last town hall?



# Recap

## What did I miss in the last town hall?

The California Mental Health Services Authority (CalMHSA) has partnered with 25+ counties, representing more than 37% of the Medi-Cal population, to develop a customized electronic health record (EHR) to meet the specific complex needs of the California behavioral health system.

Streamline's SmartCare was selected by CalMHSA as the "semi-statewide" EHR and was launched in California in July 2023.



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# Recap

## What did I miss in the last town hall?

By creating an EHR product consistent across all California counties:

All regulatory requirements will be captured across all levels of care

Documentation will be streamlined both within and between counties

Patient care is prioritized over charting

This change is critical because more people need care than ever at a time when there are more managed care functions and a workforce shortage.



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# Highlights

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Where are we now?



# EHR Project Timeline

## High Level Project Phases & Planned Timeline



SmartCare project kick-off:

January 2024



Project planning, analysis, system configuration:

In progress



Data conversion & Testing

In development



Training:

In development



Go live:

September 2024



# CCBH Sunset Timeline

## How long will CCBH be available when SmartCare goes live?

When CCBH sunsets in December 2024, access to client records will still be available.

There are several components to this as access to CCBH will slowly phase out:

At SmartCare go-live in September 2024, data entry in CCBH will cease

At a TBD date (likely in CY 2025), routine access to claims, adjudications, and billing information will cease.

At a final TBD date, CCBH will become view only.



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# SOC Engagement

## How will the SOC be engaged in this project?

SOC Subject Matter Expertise (SME) engagement and participation continues to be important, though the role will now be different.

SMEs will initially focus on developing a deep understanding of the system design, to:

- Identify changes to workflow based on the new, streamlined system design

- Provide recommendations related to testing and training

Currently, approximately 20 SMEs from across the SOC are meeting bi-weekly with BHS. If you have interest, contact: [heather.rey@sdcounty.ca.gov](mailto:heather.rey@sdcounty.ca.gov)





# Frequently Asked Questions

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Software, Hardware, Network Requirements



# Software and Hardware

## Requirements for Customer Workstations

### Operating System(s) Supported

Windows 10 or later

Apple IOS 11+

### Browsers Supported

Google Chrome

Microsoft Edge (Windows only)



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# Software and Hardware

## Requirements for Customer Workstations

### Hardware Requirements

2.0+ GHz multi-core processor

8GB of free RAM

10GB of free disk space

Broadband (10MBps+) Internet Connection

### Insurance Card Scanning Hardware

Ambir ImageScan Pro 490i Duplex ID Card and Document Scanner



# Signature Pad Hardware and Software

## Recommendations

SmartCare supports Topaz-branded USB signature pads directly connected to the workstation; T-LBK460-HSB-R is the recommended model.

Topaz SIGWEB drivers (available from Topaz).

**Note:** Topaz signature pads are recommended by SmartCare because they provide the best user experience, however SmartCare reports that iPads can be used to capture client signatures with Google Chrome.



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# Network Requirements

## For Customer Workstations

The minimum requirements from the LAN (local network) side would be based on the NIC's (network interface card) speed with a MINIMUM of 100Mbps

The minimum requirements for the internet pipeline are 3Mbps minimum X 100 users therefore a pipeline of 300Mbps would suffice



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# SOC Impacts & Actions

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What can you do now to prepare?



# SOC Support Roles

**Three primary SOC roles to support SmartCare implementation**

Super Users (Early Adopters)

Deep Dive Subject Matter Experts (SMEs)

Site Leads



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# Superusers (Early Adopters)

## Role and Responsibility

- Super Users (Early Adopters), are SMEs with early access to SmartCare:
  - Review SmartCare functionality and understand workflows
  - Conduct testing & receive early training
- Super Users will assist during go live (troubleshoot and communicate issues)
- Super Users include SMEs who have been participating in bi-weekly demo sessions
  - If you have interest, contact Heather Rey at [heather.rey@sdcounty.ca.gov](mailto:heather.rey@sdcounty.ca.gov)



# Deep Dive SMEs

## Role and Responsibility

- Deep dive SMEs will participate in a more in-depth review of SmartCare, with a focus on particular areas of functionality and/or user roles
- If you have interest, contact Heather Rey at [heather.rey@sdcounty.ca.gov](mailto:heather.rey@sdcounty.ca.gov)



# Site Leads

## Role and Responsibility

- During go-live, the role of a site lead is to:
  - Act as the “go-to” person for their site
  - Support staff and secure answers to questions on-site during go-live
  - Facilitate communication between the site and BHS
  - Assist in reporting issues to the help desk
  - Participate in briefings prior to and during go-live



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# Site Leads

## How do I choose site leads?

- What makes a good site lead?
  - Experienced front-line EHR users who are respected by colleagues
  - Strong communicators & detail oriented
  - Troubleshooters who enjoy resolving issues
- How many site leads should I identify?
  - The number of site leads needed will depend on size and type of facility.
  - Each facility will need to assess needs, but BHS will offer guidance as the project proceeds.



# SOC Actions

## What should the SOC do now to prepare?

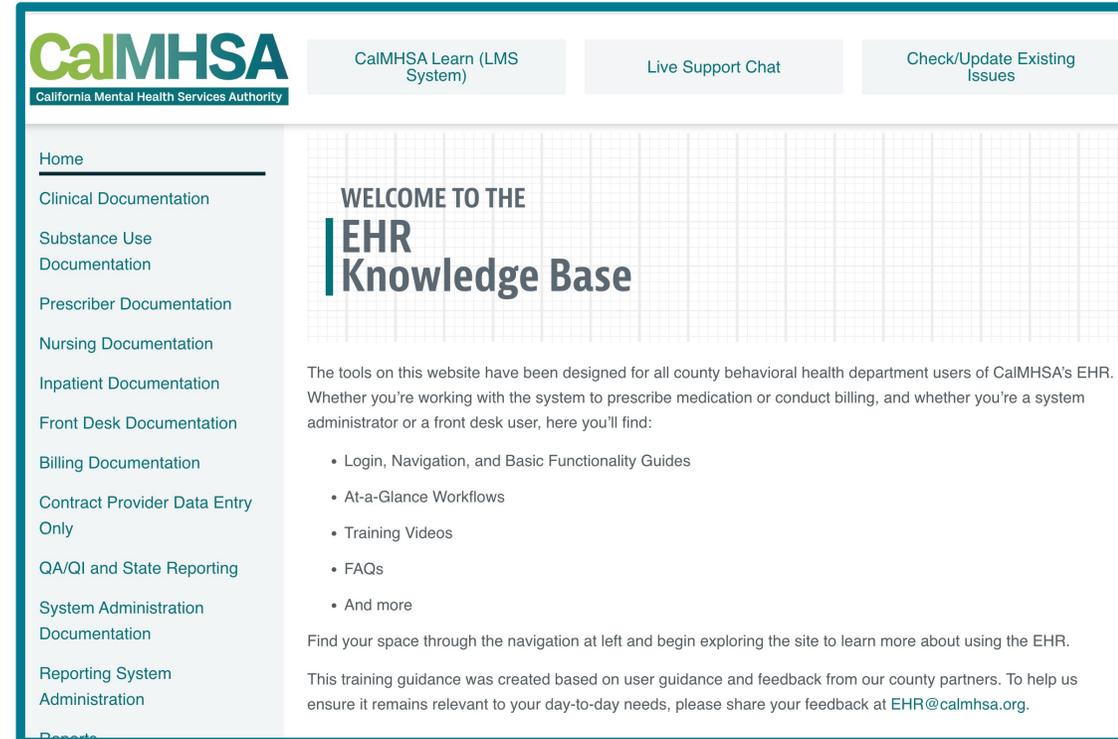
- **Begin to think about who at your locations can serve as site lead**
  - All SOC facilities should begin to identify potential site leads
  - BHS will provide guidance on sharing site lead contact information as project planning proceeds.
- Maintain awareness about project status
- Communicate with your staff to raise awareness



# SOC Actions

## What should the SOC do now to prepare?

- Visit the CalMHSA website to review materials (<https://2023.calmhsa.org>)



**CalMHSA**  
California Mental Health Services Authority

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

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  
Reports

### 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](mailto:EHR@calmhsa.org).





# SOC Resources

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





# Q&A

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For any further questions, contact: [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)

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

