



MH and SUD SOC SmartCare Town Hall

May 21, 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

Recap

Project Updates

Training

SmartCare Demo

SmartCare Site Leads

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?

In the SUD SOC town hall

We talked about the value of an EHR, and highlighted differences between SanWITS and SmartCare.

Use cases were shared to demonstrate enhancements to client care with the SmartCare implementation.

Providers with their own EHR will largely continue to use their own EHR for clinical documentation, though certain information will need to be entered into SmartCare (e.g., billing, mandated reporting, etc..)



Recap

What did I miss in the last town hall?

CCBH training will cease on June 26 for the MH SOC and SanWITS training will cease on July 17 for the SUD SOC; new hires should use downtime forms.

For the MH SOC, new prescribers will use the self-training Doctor's HomePage option after Optum's DHP training ceases.



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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



SOC Participation

SOC providers are well represented, with good progress made!

SOC participation has been strong;

80 SMEs have access to the Sandbox to begin testing.

SOC deep dives began in April across both the MH and SUD SOC and will continue into June





Training

Navigating CCBH Training and Preparing for SmartCare Training



Navigating Training July - August

MH and SUD SOC Guidance

In general, in lieu of new training in CCBH and SanWITS, use downtime forms.

It is recognized not all currently available downtime forms are available on the CalMHSA website. QA will have necessary downtime forms available as needed prior to go live.

Administrative staff will continue to enter all information required for billing.

A CCBH / SanWITS guidance document will be shared to assist with navigating training before SmartCare go-live.



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Survey Results – SOC Preferences

Classroom vs Video Training

A survey was conducted during the last town halls to assess SOC training preferences; a total of 798 responses were captured.

Overall: 61% video tutorial / 39% classroom training

Twice as many administrative professionals prefer video over classroom

Clinicians prefer video over classroom

Central region (45%) largely preferred for classroom, followed by South (14%) and North Central (13%)

High number of text responses requesting live virtual training.



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SmartCare Demo

Assessment Appointment





SmartCare Site Leads

Roles and Responsibilities, Selecting Site Leads, Time Commitment & Preparation



SmartCare Site Leads

Recommendation to Support Go-Live

Each program within the mental health and substance use disorder systems of care is **strongly recommended to identify one or more site leads per site** to assist with on-site communication and troubleshooting for the SmartCare go-live.



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SmartCare Site Leads

Role and Responsibility

Site leads are staff or management at each site identified by program leadership to serve as on-site support leading up to, during, and immediately after the SmartCare go-live.

During go-live, the role of a site lead is to:

Act as the “go-to” person for their site,

Support staff by managing questions on-site

Facilitate communication

Assist in reporting issues

Participate in briefings



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SmartCare Site Leads

Selecting Site Leads

Good candidates are experienced frontline users, trusted colleagues, strong communicators, and familiar with clinical and administrative workflows.

The number of site leads will depend on many variables, and each site should assess their needs.

BHS recommends a minimum of one site lead per shift familiar with clinical workflows, and one site lead per shift familiar with administrative workflows.



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SmartCare Site Leads

Time Commitment and Preparation

Most site lead preparation will occur via SmartCare training

The time commitment, not inclusive of training, is roughly 5 hours total:

- One-hour virtual briefing with BHS to review protocol for reporting issues

- Two 20-minute briefings per day during the week of go-live

While not required, site leads may also help support internal preparation and communication.



SmartCare Site Leads

Next Steps

Each program within the mental health and substance use disorder systems of care is **strongly recommended to identify one or more site leads per site** to assist with on-site communication and troubleshooting for the SmartCare go-live.

BHS will send a request for site lead names and contact information in mid-June.



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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**
 - BHS will provide guidance to share site lead contact information in June
- **Review hardware, software, and network requirements** and assess what is needed to prepare for implementation.
- **Prepare for new hire orientation 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.

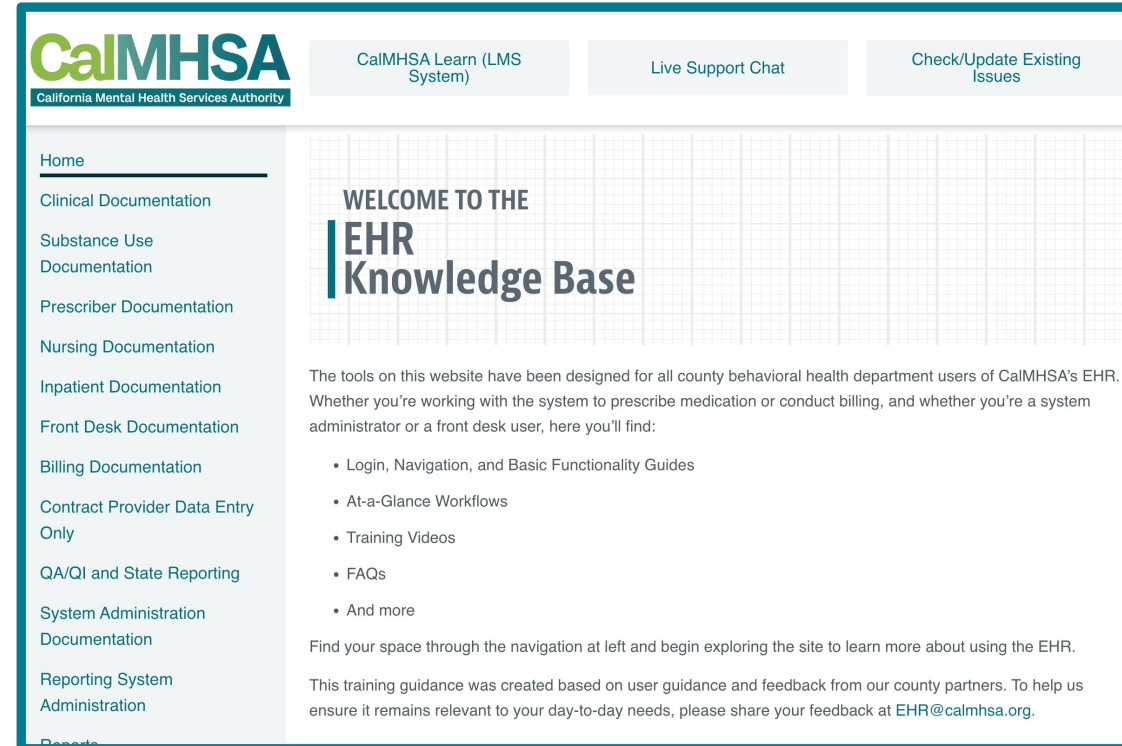


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SOC Actions

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>)



The screenshot shows the CalMHSA website interface. At the top left is the CalMHSA logo (California Mental Health Services Authority). To the right are three buttons: "CalMHSA Learn (LMS System)", "Live Support Chat", and "Check/Update Existing Issues". A navigation menu on the left lists various documentation categories: 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 is titled "WELCOME TO THE EHR Knowledge Base" and contains a welcome message and a list of resources: "Login, Navigation, and Basic Functionality Guides", "At-a-Glance Workflows", "Training Videos", "FAQs", and "And more". It also includes instructions on how to find their space and a request for feedback at EHR@calmhsa.org.





SOC Resources

What happens next?



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



SmartCare MH & SUD FAQs

Where can I find resources and information?

- Frequently Asked Questions (FAQs) have been posted (as of 4/10).
- You are encouraged to review via [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)

