MH and SUD SOC SmartCare Town Hall

June 18, 2024

County of San Diego

Heath and Human Services Agency

Behavioral Health Services

LIVE WELL SAN DIEGO

Meeting Goals

Transparency

Engagement

Inclusion

Preparation

LIVE WELL
SAN DIEGO

Meeting Agenda

Recap

Project Updates

Data Migration

Scheduler

Training

SmartCare Site Leads

SOC Actions

SOC Resources

Q&A

LIVE WELL SAN DIEGO

Recap

What did I miss in the last town hall?

LIVE WELL SAN DIEGO

Recap

What did I miss in the last town hall?

Navigating new hire training needs after CCBH & SanWITS training ceases

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

For forms not available on the CalMHSA website, QA will provide

Administrative staff will continue to enter all information required for billing

798 people responded to the April training survey, and indicated a preference for video tutorial (61%) over classroom training (39%)

Text responses also indicated a desire for live virtual training

LIVE WELL
SAN DIEGO

Recap

What did I miss in the last town hall?

BHS recommended that each program identify one or more site leads per location to assist with on-site communication and troubleshooting for the SmartCare go-live.

Most site lead preparation will occur via SmartCare training, with a total additional commitment of approximately 5 hours for site lead training plus daily briefings during go-live.

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

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

LIVE WELL SAN DIEGO

SOC Participation

How is the SOC participating in the SmartCare project?

Demos for the system of care (SOC) subject matter experts (SMEs) are complete

SMEs are now transitioning to an advisory group

Advisory group members will continue to have access to the SmartCare sandbox. Their role will be to review and advise on components of implementation planning.

LIVE WELL SAN DIEGO

SmartCare Project Updates

What do we know about SmartCare at go-live?

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

Medications

Problem lists

Review of diagnoses will be necessary

LIVE WELL SAN DIEGO

SmartCare Project Updates

What do we know about SmartCare at go-live?

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

LIVE WELL
SAN DIEGO

Data Migration

How much data will be migrated into SmartCare?

BHS is planning to migrate minimal demographic information on every client currently in CCBH or SanWITS into SmartCare for go-live

The goal is to ensure providers can look up a client in SmartCare and know based on the information available whether they need to look in the legacy system for additional information.

LIVE WELL
SAN DIEGO

Data Migration

How much data will be migrated into SmartCare?

For a smaller cohort of clients - either the most recent episode or assignment, or the past two years - BHS is expecting to migrate additional clinical information. This can occur in two ways:

- Direct data migration: includes minimal demographic information plus assignments or episodes and diagnoses

- Clinical PDFs: BHS is planning on the availability of nine clinical pdfs for data that cannot be directly migrated into SmartCare

LIVE WELL SAN DIEGO

Data Migration

Clinical PDF document types

Medications, Diagnoses, Allergies

Discharge Summary

BHA Adult

BHA Children

Problem List

Mobile Crisis Assessment

CSU Episode Summary

Psychiatric Assessment

Progress Notes*

SmartCare Scheduler

Will we be required to use Scheduler?

LIVE WELL SAN DIEGO

SmartCare Scheduler

Will we be required to use the SmartCare Scheduling System?

"Scheduler" is SmartCare's scheduling system.

The official determination from BHS leadership regarding the required use of Scheduler is outstanding

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

LIVE WELL
SAN DIEGO

SmartCare Scheduler

Why is Scheduler recommended for outpatient Providers?

Allows the system of care to make warm handoffs. 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

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

LIVE WELL SAN DIEGO

SmartCare Training

Preparing for SmartCare Training

LIVE WELL SAN DIEGO

Required Training
- All Users
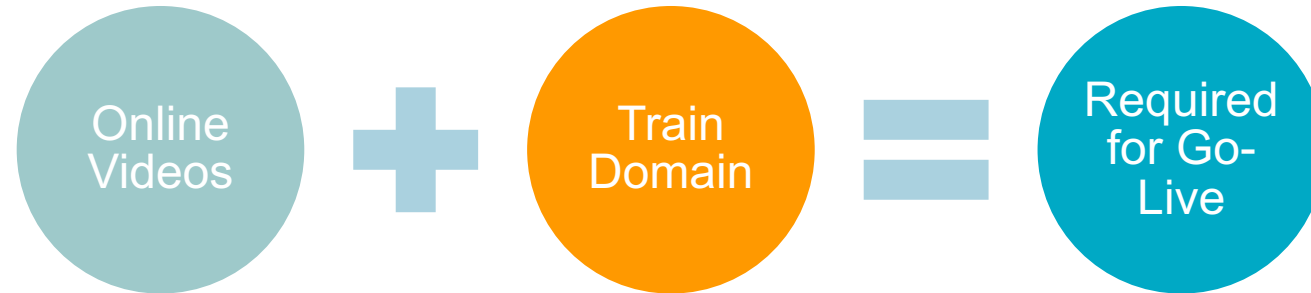- CalMHSA Videos
- Role Based
- Follow along in Train Domain

Optional Training
- Live Instructor
- Level II Class
- Structured Agenda with Practice Scenarios
- In-Person or Online

Go-Live: 9/1/24

Required Training

CaIMHSA On-Demand "Moodle" Videos

Online Videos **+** Train Domain **=** Required for Go-Live

- On-demand - no need to register according to a set schedule

- Short videos, broken down by individual workflows

- Pause, speed up (x1.5, x2) or slow down videos as needed

- Enable closed captioning

- Can retake as many times as needed

- Assigned specific trainings by role*

- Training will commence in mid-July

LIVE WELL SAN DIEGO

SmartCare Site Leads

Next Steps for Training & Preparation

LIVE WELL SAN DIEGO

SmartCare Site Leads

SOC Response & Next Steps

A total of 565 site leads were submitted by the SOC

Soon, a welcome email outlining next steps will be shared with site

leads. This includes:

Description of role and responsibility

Kick off meeting date

Training dates and requirements

Go-live daily briefing expectations

Post-go-live touchpoints and lessons learned.

LIVE WELL SAN DIEGO

SOC Actions

What can you do now to prepare?

SOC Actions

What should the SOC do now to prepare?
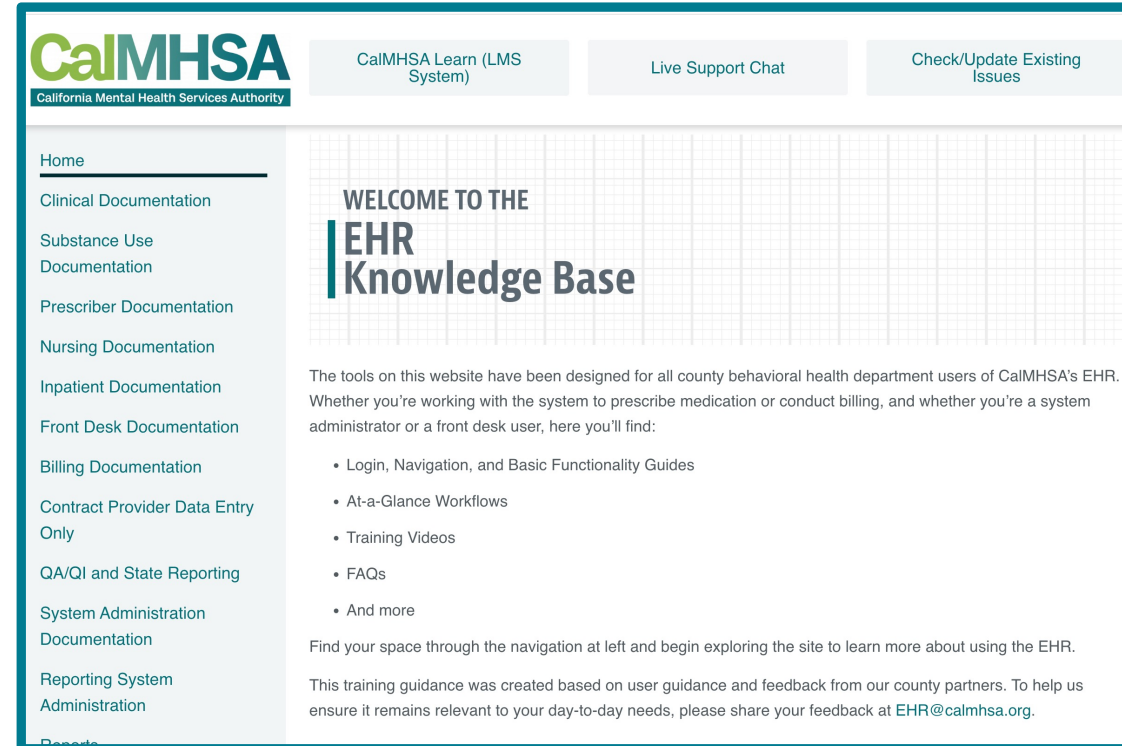
- **Ensure your site lead is oriented to onsite plans** for downtime and go-live.

- **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.

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)

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

LIVE WELL SAN DIEGO

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

LIVE WELL SAN DIEGO

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

LIVE WELL SAN DIEGO

Q&A

_____

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

Or go online for more information at: **Optumsandiego.com**

LIVE WELL SAN DIEGO