



# Mental Health SOC EHR Implementation Town Hall

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March 19, 2024

County of San Diego

Health and Human Services Agency

Behavioral Health Services



# Meeting Goals



Transparency



Engagement



Inclusion



Preparation



LIVE WELL  
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# Meeting Agenda

A Quick Recap

SUD SOC Update

CCBH Training

CalAIM Assessment (BHA)

SmartCare Reporting

SOC Actions

SOC Resources

Q&A



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# Quick Recap

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What did I miss in the last town hall?



# EHR Project Timeline

## High Level Project Phases & Planned Start Dates



SmartCare project kick-off:

January 2024



Project planning, analysis, system configuration:

February 2024



Testing (workflows):

April 2024



Data conversion (First Round):

May 2024



Testing (converted data):

June 2024



Training :

July 2024



Go live:

September 2024



# Recap

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

Hardware, Software, and Network Requirements were shared and are now available on the MHP Provider Documents page on Optum's website

Requirements for customer workstations

Signature pad hardware and software

Note: SmartCare is NOT supported by Safari or Firefox

**Edge or Chrome must be used**



# Recap

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

### SOC Support Roles

Super Users

Deep Dive Subject Matter Experts (SMEs)

Site Leads



Contact Heather Rey at  
[heather.rey@sdcounty.ca.gov](mailto:heather.rey@sdcounty.ca.gov)

by 3/29 if you want to  
participate!



# Recap

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

### CCBH sunsets in December 2024:

Access to client records will still be available when CCBH sunsets.

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

Eventually, CCBH will become view only.

All client records will continue to be available; BHS is evaluating how and where historical client records will be accessed.







# SUD SOC Update

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Timelines & Guidance



# SUD SOC Update

## A shift in strategy

BHS has been working on an upgrade to SanWITS for the Substance Use Disorder (SUD) SOC.

BHS began evaluating SmartCare for the SUD SOC and found it provides more efficient and streamlined workflows that satisfy CalAIM.

It meets 42 CFR Part 2 privacy requirements and includes a robust consent management tool.

As a result, **BHS is halting the SanWITS upgrade and pivoting to the implementation of SmartCare.**



# Data Sharing and Increased Visibility

Clinical Data Access Groups (CDAGs) will be set up within SmartCare to determine which programs information you are able to see based on roles

**Clients can consent to sharing treatment information** via a SmartCare consent form

SUD providers may be able to see other SUD providers documentation

SUD providers may be able to see Mental Health providers documentation

Mental Health providers may be able to see SUD providers documentation



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# CCBH Training

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Timelines & Guidance



# CCBH Training

**CCBH training will end on or before June 30, 2024.** Some CCBH classes will not be available after mid-June, with registration closing earlier in the month.

For example:

Service Entry- 6/13 (closed for processing 6/6)

Doctor's Homepage- 6/15 (closed for processing 6/8)

Assessments- 6/22 (closed for processing 6/15)

Client Plans and Progress Notes- 6/26 (closed for processing 6/16)

Scheduler- 6/27 (closed for processing 6/20)

Progress Notes- 6/29 (closed for processing 6/22)

Admin Data Entry- 6/30 (closed for processing 6/23)



# CCBH Training

## How do I navigate training needs in July and August?

Paper will need to be utilized during the transition to SmartCare for new providers

Information necessary to be entered to ensure billing will need to be entered

Billing can still be entered via Service Entry into CCBH

More information will be provided





# CalAIM Assessment (BHA)

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What to expect in SmartCare



SanDiegoCntySmartcareTrain | 3-14-2024

SmartCare 🔍 ★ 👤 BirdTest, Humming (1007) + ×

👤 📄 ☰ CalAIM Assessment

Effective 03/19/2024 📅 Status New Author 👤 03/

**General**

**Domain 1 - Presenting Problems**

List/Describe Presenting Problem(s), Current Mental Status, History of Presenting Problem(s) and Client-Identified Impairment(s).

## Domain 1 – Presenting Problems





## CalAIM Assessment

Effective 03/19/2024



Status New

Author

### General

#### Domain 2 - Trauma

List/Describe Trauma - Indicate N/A if not applicable.

**Domain 2 –  
Trauma**

## CalAIM Assessment

Effective 03/19/2024



Status New

Author

### General

#### Domain 3 - Behavioral Health History

List/Describe Behavioral Health History, Substance Use History, and Comorbidity.

**Domain 3 –  
BH History**



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## CalAIM Assessment

Effective 03/19/2024



Status New

Author

### General

#### Domain 4 - Developmental / Medical History

List/Describe Developmental History, Medical History, Current Medications, and Comorbidity with Behavioral Health.

**Domain 4 –  
Developmental /  
Medical History**

## CalAIM Assessment

Effective 03/19/2024



Status New

Author

### General

#### Domain 5 - Social / Cultural

List/Describe Social and Life Circumstances and Culture/Religion/Spirituality.

**Domain 5 –  
Social / Cultural**



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## CalAIM Assessment

Effective 03/19/2024



Status New

Author

### General

#### Domain 6 - Strengths / Risks

List/Describe Strengths, Risk Behaviors, and Safety Factors.

## CalAIM Assessment

Effective 03/19/2024



Status New

Author

### General

#### Domain 7 - Summary and Recommendations

List/Describe Clinical Summary and Recommendations, Diagnostic Impression, and Medical Necessity Determination/Level of Care/Access Criteria.

**Domain 6 –  
Strengths /  
Risks**

**Domain 7 –  
Summary &  
Recommendations**



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# SmartCare Reporting

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Overview of Reporting Options



# Reporting Options

SmartCare Reports (Canned)

List Pages

Widgets

Ad-hoc Reporting (User Created)



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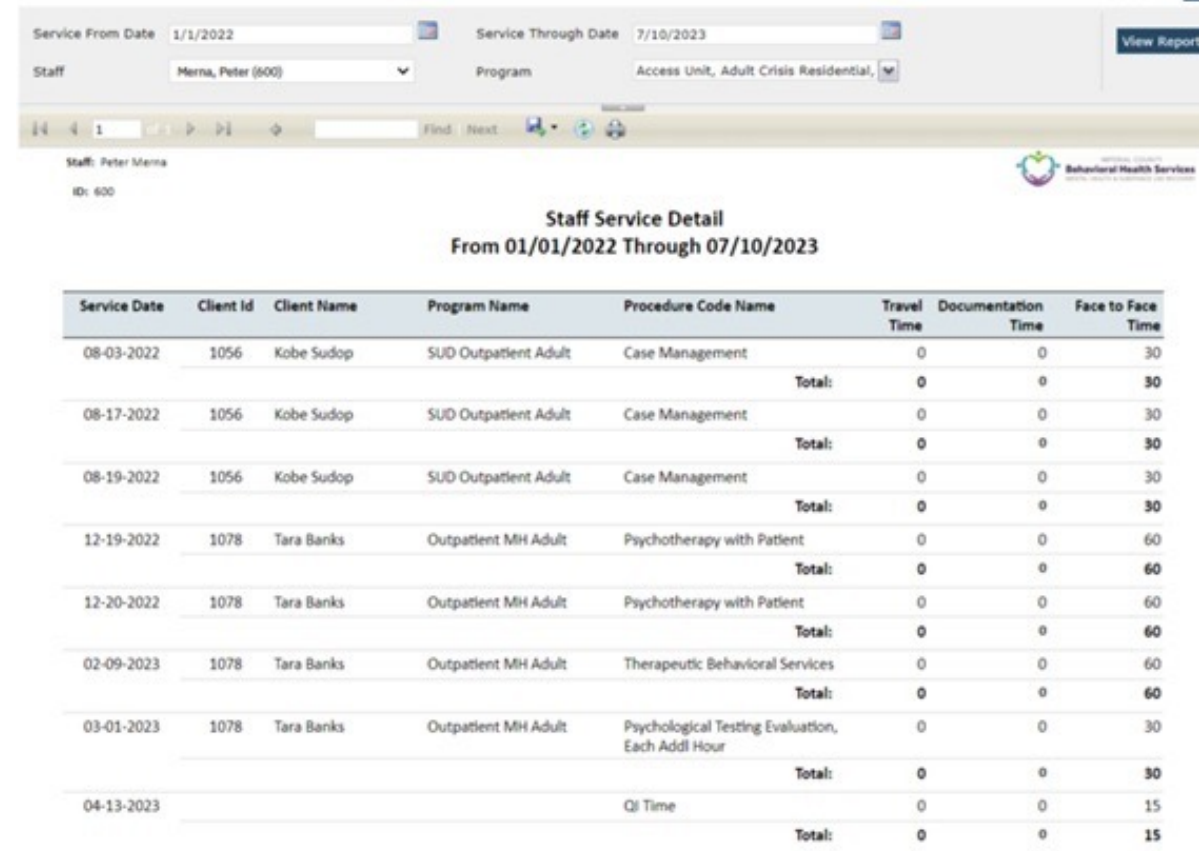
# SmartCare (Canned) Reports

Completely customizable  
by County

Accessible through  
SmartCare

Provides real time  
updates

Data can be constrained  
to the user's role



The screenshot shows a web-based report interface. At the top, there are filters for 'Service From Date' (1/1/2022), 'Service Through Date' (7/10/2023), 'Staff' (Merna, Peter (600)), and 'Program' (Access Unit, Adult Crisis Residential). A 'View Report' button is visible on the right. Below the filters, the report title is 'Staff Service Detail From 01/01/2022 Through 07/10/2023'. The main content is a table with the following columns: Service Date, Client Id, Client Name, Program Name, Procedure Code Name, Travel Time, Documentation Time, and Face to Face Time. The table contains several rows of data, including dates like 08-03-2022, 08-17-2022, 08-19-2022, 12-19-2022, 12-20-2022, 02-09-2023, 03-01-2023, and 04-13-2023, with corresponding client names and program details. Total values are provided for each row.

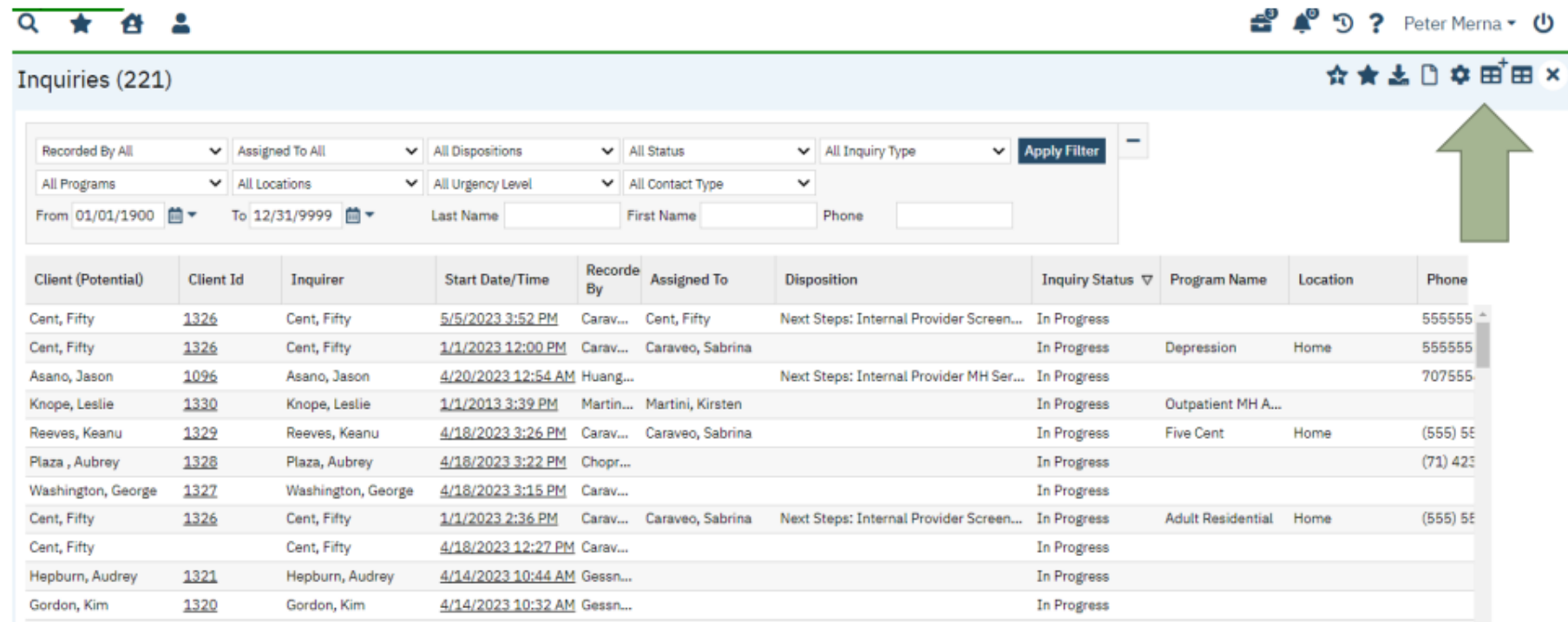
Service Date	Client Id	Client Name	Program Name	Procedure Code Name	Travel Time	Documentation Time	Face to Face Time
08-03-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
08-17-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
08-19-2022	1056	Kobe Sudop	SUD Outpatient Adult	Case Management	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
12-19-2022	1078	Tara Banks	Outpatient MH Adult	Psychotherapy with Patient	0	0	60
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>60</b>
12-20-2022	1078	Tara Banks	Outpatient MH Adult	Psychotherapy with Patient	0	0	60
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>60</b>
02-09-2023	1078	Tara Banks	Outpatient MH Adult	Therapeutic Behavioral Services	0	0	60
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>60</b>
03-01-2023	1078	Tara Banks	Outpatient MH Adult	Psychological Testing Evaluation, Each Addl Hour	0	0	30
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>30</b>
04-13-2023				QI Time	0	0	15
				<b>Total:</b>	<b>0</b>	<b>0</b>	<b>15</b>



# List Pages

Allows user to save or “favorite” list page settings for future use

Change settings such as columns to show, order, width, and export options



The screenshot displays a web application interface for managing inquiries. At the top, there is a navigation bar with a search icon, a star icon, a home icon, and a user profile icon. On the right side of the navigation bar, there are icons for notifications, a refresh icon, a help icon, and the user name "Peter Merna" with a dropdown arrow and a power icon.

Below the navigation bar, the main content area is titled "Inquiries (221)". To the right of this title is a settings toolbar containing icons for favorite, download, print, settings, and a close icon. A green arrow points to the settings icon.

Below the settings toolbar is a filter section with several dropdown menus: "Recorded By All", "Assigned To All", "All Dispositions", "All Status", "All Inquiry Type", "All Programs", "All Locations", "All Urgency Level", and "All Contact Type". There is also an "Apply Filter" button. Below these are date range selectors for "From" (01/01/1900) and "To" (12/31/9999), and input fields for "Last Name", "First Name", and "Phone".

The main data area is a table with the following columns: Client (Potential), Client Id, Inquirer, Start Date/Time, Recorded By, Assigned To, Disposition, Inquiry Status, Program Name, Location, and Phone. The table contains 11 rows of data.

Client (Potential)	Client Id	Inquirer	Start Date/Time	Recorded By	Assigned To	Disposition	Inquiry Status	Program Name	Location	Phone
Cent, Fifty	1326	Cent, Fifty	5/5/2023 3:52 PM	Carav...	Cent, Fifty	Next Steps: Internal Provider Screen...	In Progress			555555
Cent, Fifty	1326	Cent, Fifty	1/1/2023 12:00 PM	Carav...	Caraveo, Sabrina		In Progress	Depression	Home	555555
Asano, Jason	1096	Asano, Jason	4/20/2023 12:54 AM	Huang...		Next Steps: Internal Provider MH Ser...	In Progress			707555
Knope, Leslie	1330	Knope, Leslie	1/1/2013 3:39 PM	Martin...	Martini, Kirsten		In Progress	Outpatient MH A...		
Reeves, Keanu	1329	Reeves, Keanu	4/18/2023 3:26 PM	Carav...	Caraveo, Sabrina		In Progress	Five Cent	Home	(555) 5E
Plaza, Aubrey	1328	Plaza, Aubrey	4/18/2023 3:22 PM	Chopr...			In Progress			(71) 423
Washington, George	1327	Washington, George	4/18/2023 3:15 PM	Carav...			In Progress			
Cent, Fifty	1326	Cent, Fifty	1/1/2023 2:36 PM	Carav...	Caraveo, Sabrina	Next Steps: Internal Provider Screen...	In Progress	Adult Residential	Home	(555) 5E
Cent, Fifty		Cent, Fifty	4/18/2023 12:27 PM	Carav...			In Progress			
Hepburn, Audrey	1321	Hepburn, Audrey	4/14/2023 10:44 AM	Gessn...			In Progress			
Gordon, Kim	1320	Gordon, Kim	4/14/2023 10:32 AM	Gessn...			In Progress			



# Widgets

Provides face-up information for specified data

Can build own widgets to display specific data

Widgets can be built based upon Client, General, Insurer, or Provider type

Widgets (81)

All Widget Types Apply Filter

Widget Id	Widget Name	Display As	Widget Type	Screen Id
26	Accounts Receivable	<a href="#">Accounts Receivable</a>	General	
70	Accounts Receivable by Payer	<a href="#">Accounts Receivable by Payer</a>	General	
95	Allergies	<a href="#">Allergies</a>	Client	
21	Appointments For Today	<a href="#">Appointments For Today</a>	General	
71	Appointment for Today with Past Schedu...	<a href="#">Services for Today with Past Scheduled</a>	General	
76	Assigned Document(s)	<a href="#">Assigned Document(s)</a>	General	
60	Authorizations	<a href="#">Authorizations</a>	Insurer	
9	Authorizations Requested	<a href="#">Authorizations Requested</a>	General	
93	BMI	<a href="#">BMI</a>	Client	
104	CalOMS Reporting Summary	<a href="#">CalOMS Reporting Summary</a>	General	
108	CalOMS Reporting Summary	<a href="#">CalOMS Reporting Summary</a>	General	
105	CANS Reporting Summary	<a href="#">CANS Reporting Summary</a>	General	
109	CANS Reporting Summary	<a href="#">CANS Reporting Summary</a>	General	
57	Care Management Claims	<a href="#">Master Claims Widget</a>	Insurer	
56	Care Management New Alerts/Messages	<a href="#">Care Management New Alerts/Messages</a>	General	

Client Dashboard Save

### Treatment Team

Role	Name
<Unknown Team Role>	Brusa, Stan
Primary Clinician*	Williams, LaQuita
Program Assignment Staff: SUD Outpatient Adult*	Williams, LaQuita
Program Assignment Staff: Outpatient MH Adult*	Williams, LaQuita

### Summary

Name : Banks, Tara  
DOB : 07/26/1980  
Age : 42 Year  
Home Address : 2407 S Cordial Lane Pacoima, CA 91331  
Home Phone : (323) 518-2668

### UMDAP test

UMDAP Financial Assessment

	12/19/2022
PhoneType	30
RelationshipToClient	6781

### BMI

BMI : 29.29 Weight : 150.00

01/18/2023

### Current Allergies(0)

No data to display





# Ad Hoc Reporting (User created)

Allows user to quickly generate reports with specific, configurable parameters

Data is limited to the user's permissions

Reports can be saved for easy access at a future date

Streamline Healthcare Solutions Ad-hoc Reporting

Logout

Catalog Report Name   Favorite Report

Catalogs: Clinical

Catalog Report: staff test 1, client test 1

Entities and attributes: DocumentCodes, DocumentDiagnosis, DocumentDiagnosisCodes, DocumentDiagnosisFactors, Documents, DocumentSignatures, Locations, ProcedureCodes, Programs, ServiceDiagnosis, Services, Staff, StaffClients

Result columns:

Expression	Title	Sorting
Clients ClientId	Clients ClientId	Not sorted
Clients FirstName	Clients FirstName	Not sorted
Clients LastName	Clients LastName	Not sorted
Clients SexDescription	Clients SexDescription	Not sorted

Query conditions: Select records where all of the following apply

Result: [Export to Excel](#) [Export to Csv](#) [Update result](#)

Clients ClientId	Clients FirstName	Clients LastName	Clients SexDescription	Clients SSN	Clients DOB
1	Client	Everyman	Male	111111111	1/1/2000 12:00:00 AM
1007	JeCoB	BAizE	Male	999999999	5/27/2003 12:00:00 AM
1008	Junior	Smith		234555987	0/9/1990 12:00:00 AM
1009	Service	Everyman	Male	134405554	0/12/2019 12:00:00 AM
1010	Sheelu	Ashok		223344556	3/9/1995 12:00:00 AM
1011	June	Billing	Female	900000000	2/14/1990 12:00:00 AM

SQL





# SOC Actions

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What can you do now to prepare?



# Superuser SMEs (Early Adopters) Needed

## Role and Responsibility

Super Users (Early Adopters), are SMEs with early access to SmartCare:

Review SmartCare functionality and understand workflows

COMPLETE LMS TRAININGS (must be done by 4/12/24)

Conduct testing & receive early training (to begin 4/15/24)

Participate in Gap Analysis & Deep Dives in conjunction with CalMHSA

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)

**MUST be identified and submitted by 3/29/24**



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# SOC Volunteers Needed: RAND Study

## Role and Responsibility

CalMHSA hired RAND to measure the difference between current EHRs and SmartCare.

Prescribers and clinicians are requested for a pre-test, post-test study on clinical test scenarios (e.g., completing a clinical assessment).

SOC volunteers will participate in a 1-hour pre-test and 1-hour post-test

If you are interested or have staff who can participate, **contact Heather**

**Rey at [heather.rey@sdcounty.ca.gov](mailto:heather.rey@sdcounty.ca.gov) no later than 3/29/2024**



# SOC Actions

## What should the SOC do now to prepare?

- **Begin to identify 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.
- **Review hardware, software, and network requirements** and assess what is needed to prepare for implementation.

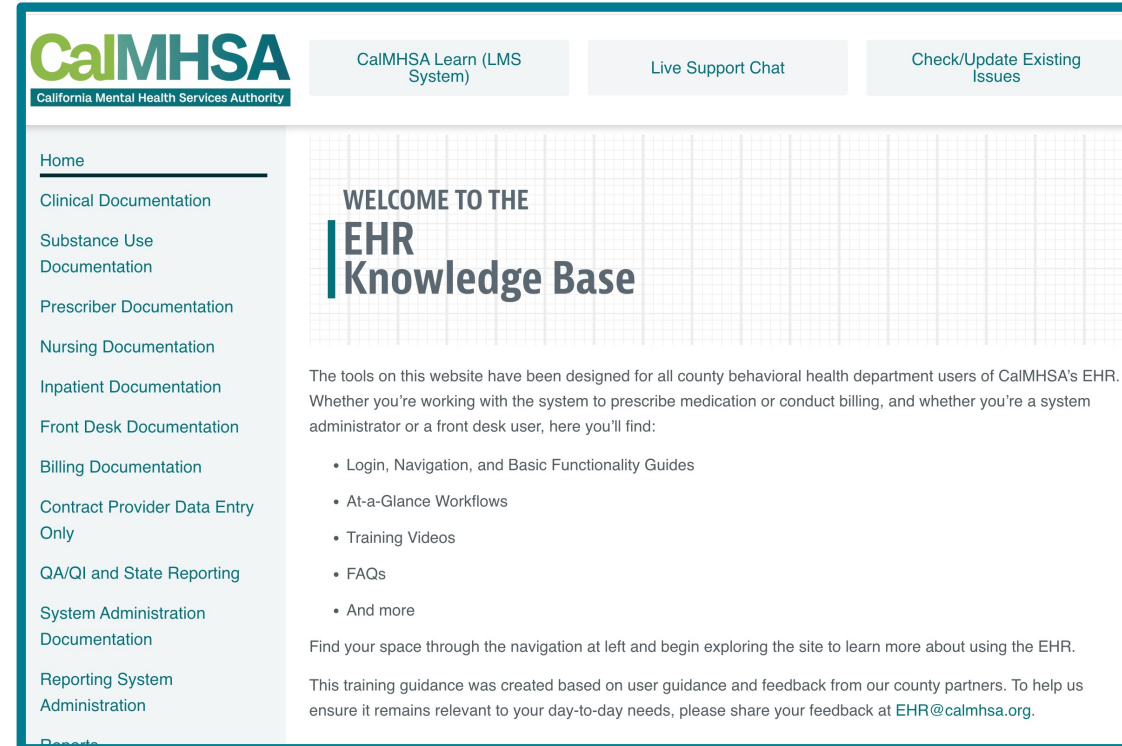


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# SOC Actions

## 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>)



**CalMHSA**  
California Mental Health Services Authority

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

### 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 **SmartCare** 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)

