MH and SUD SOC SmartCare Town Hall

October 8, 2024

County of San Diego

Heath and Human Services Agency

Behavioral Health Services

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Meeting Goals & Agenda

Transparency

Engagement

Inclusion

- General Updates & Reminders
- Help Desk & Reporting
- Access & Training
- Functionality and Requirements
- SOC Resources
- Q&A

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General Updates & Reminders

High-level Information about the SmartCare implementation

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Entry of Services

Important Reminder

- **Programs should NOT enter any services into CCBH or SanWITS for dates of service occurring AFTER 9/1/2024**
- Any services entered in CCBH or SanWITS for dates of service occurring on or after 9/1/2024 will need to be re-entered into SmartCare to avoid billing impacts.
- **BHS will be contacting programs to fix services entered incorrectly. Services entered into the wrong system will not be paid.**

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For New Clients: CCBH Access is View Only

Important Reminder: Do not document in CCBH

- Providers may need to view historic information in CCBH
- Most providers have CCBH access to allow for viewing of information for clients who have been opened to the provider's program.
- If needed, providers may open an assignment for the client in CCBH to view this documentation, and then close it in CCBH when the client closes with them in SmartCare, or once the necessary documentation was reviewed.
- **Providers should not complete any intake documentation or update any client information in CCBH – this is for view only purposes.**
- Exception: Providers may need to update information related to billing if the service is showing up on a suspense report

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Regularly Scheduled System Maintenance

Details and Timeline

- Regularly scheduled SmartCare system maintenance will occur every Sunday at midnight into Monday morning
- SmartCare will be unavailable for 4-6 hours
- Use downtime procedures during this time
- You may experience extreme slowness if you log in at the end of the maintenance window

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Password Resets

Details and Timeline

- SmartCare passwords must be reset every 90 days
- Users will be prompted at the end of each 90-day period
- Passwords must be at least 8 characters, include upper and lower-case letters, numbers, and a special character.

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Site Leads

Thank you to the site leads supporting the SOC during go live!

- Site leads completed a survey on September 27 related to their experience with the SmartCare implementation; 10% responded.
- Two primary themes:
  - Providers experienced difficulty knowing where to go for answers and issues during go-live
  - Providers wanted more focused training than offered via LMS alone
- Site lead briefings / meetings have now ceased, with critical discussion and decision-making occurring through the SmartCare Advisory Group.

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SmartCare Advisory Group

Continuation of Advisory Group Activities

- Advisory Group meetings continue to communicate issues, discuss questions about policy change, and explore post go-live considerations.
- QA Representatives from both the MH and SUD SOC participate.
- The purpose is to share information, collaborate together with decision making representatives from the SOC, and work together to operate under a single SOC.
- BHS is working to secure a larger room given the increased demand for attendance.

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Help Desk & Reporting

Process to Access Support

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Issue Reporting & Questions

General Help Desk Processes and Structures

- Contact the CalMHSA help desk first for all SmartCare issues and concerns
- Exception: If you know you need to submit an ARF, complete the ARF form and send directly to MIS at BHS_EHRProject.HHSA@sdcounty.ca.gov.
- If you have a question about access and are not sure if an ARF is needed, start by reaching out to the CalMHSA help desk.
- QIMatters.HHSA@sdcounty.ca.gov should be used now only for clinically related questions (as with CCBH and SanWITS)

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Help Desk

Ongoing Support

- Help desk hours available Monday - Friday (7:00am – 7:00pm)
- Preferred order of contact: Chat → Ticket → Phone Call
- Outside normal business hours, call for system outage issues only

SmartCare Help Desk Support

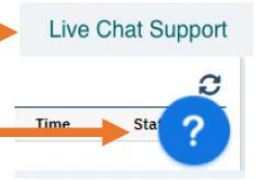
Beginning September 7, 2024, SmartCare support for system issues is offered by CalMHSA during normal business hours (in order of preferred contact):

Monday – Friday, 7:00am – 7:00pm

1. Connect via Live Chat

Live Chat can be accessed in one of three ways:

- Go to 2023.calmhsa.org and click on "Live Chat Support" at the top of the screen
- Click on the blue question mark on the bottom right corner of the screen when logged in to SmartCare
- Use this URL: https://crbeta.Buchanan.com/teamsccmessenger/calmhsa.html



2. Submit a Ticket

A ticket can be created in one of two ways:

- Emailing calmhsa.sandiego@Buchanan-mail.onbmc.com
- Submitting a ticket via 2023.calmhsa.org

3. Call (833) 686-6801

- Available during normal business hours

Note: After normal business hours, the only support available is for system outages. Call (916) 214-8348

Updated September 6, 2024

Resources

Ongoing Support

- CalMHSA Knowledge Base is available at 2023.calmhsa.org
- Access help from within SmartCare
- Access San Diego specific resources via MHP Provider Documents and DMC-ODS pages of Optum website

SmartCare Resources

Numerous SmartCare resources are available to assist you with workflow and documentation questions:

1. Go to the CalMHSA Knowledge Base

Visit the links on the CalMHSA website at 2023.calmhsa.org to explore SmartCare EHR documentation and support tools organized by role:

- Use the **search box** on the bottom of the navigation links to search the entire CalMHSA library, or
- Use **Ctrl + F** on your keyboard to search for key words within the **Documentation** sections.

2. Access help from within SmartCare

Once you are logged in to SmartCare, you can access help in the following ways:

- Use the CalMHSA **AI Documentation chatbot** to ask direct questions about workflow and documentation, or
- Click on the **black question mark** at the bottom of your screen to find "how to" documents on the CalMHSA website.

3. Access San Diego Specific Resources

For resources and guidance specific to San Diego County's use of SmartCare, go to either the MHP Provider Documents or Drug Medi-Cal Organized Delivery System pages of the **Optum website** and click on the **SmartCare tab**.

Updated September 6, 2024

SmartCare Access & Training

Details, Requirements

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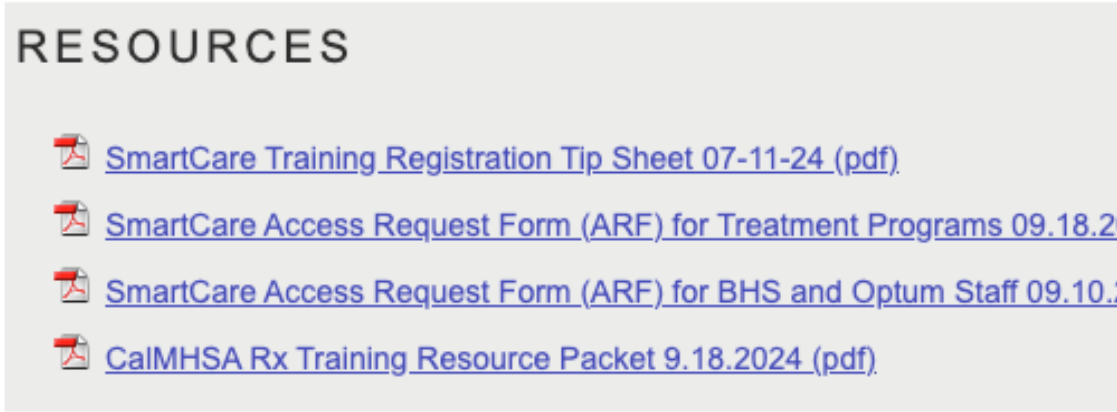
New User System Access

Process for new users to SmartCare

- **Reminder:** For new user system access, you must use the SmartCare Access Request Form (ARF) available on Optum



- ARF processing is now taking 5-10 days
- MIS is reviewing certain staff roles to ensure access aligns with job requirements; the highest priority currently is modification of supervisor roles.

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Ongoing Training Guidance

Details and Timeline

- 25 In-Person SmartCare classes will remain available through October. For more details, visit the SmartCare Training Page.
- Between 10/22 and 10/31, 9 classes are repurposed into live virtual trainings; Sessions are 3 hours each with a max capacity of 20.
- November will be a blend of in-person and live virtual classes.
- To register for the live virtual classes, go to RegPack. SMARTCARE REGPACK
- Email QIMatters.HHSA@sdcounty.ca.gov with questions.

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Technical Support Hours

Details and Timeline

- Optum will offer technical support hours (formerly titled office hours) on an ongoing basis.
- Technical support hours are virtual sessions where users can drop in based on role.
- Optum will not advise program staff what they should do in the system, nor will they resolve live access issues or elevate system issues.

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Technical Support Hours

Date	Day	Time	Technical Support Hours
2-Oct	Wednesday	3pm-4pm	Residential & Crisis Residential Clinical/Nurses/Prescribers
3-Oct	Thursday	3pm-4pm	Outpatient Clinical Direct Services
7-Oct	Monday	3pm-4pm	Outpatient Prescribers
8-Oct	Tuesday	9am-10am	CSU Clinical/Nurses/Prescribers
8-Oct	Tuesday	3pm-4pm	Program Managers, CORS, & QA
9-Oct	Wednesday	3pm-4pm	CSU Admin/Clerical
10-Oct	Thursday	3pm-4pm	Residential & Crisis Residential Admin/Clerical
16-Oct	Wednesday	3pm-4pm	Outpatient Nurses
17-Oct	Thursday	3pm-4pm	Admin Billing Only
21-Oct	Monday	3pm-4pm	Outpatient Admin Clerical Front Desk
22-Oct	Tuesday	3pm-4pm	CSU Admin/Clerical
23-Oct	Wednesday	3pm-4pm	Outpatient Prescribers
24-Oct	Thursday	3pm-4pm	Residential & Crisis Residential Clinical/Nurses/Prescribers
28-Oct	Monday	10am-11am	Outpatient Clinical Direct Services
28-Oct	Monday	3pm-4pm	Outpatient Nurses
29-Oct	Tuesday	10am-11am	Admin Billing Only
29-Oct	Tuesday	3pm-4pm	Residential & Crisis Residential Admin/Clerical
30-Oct	Wednesday	3pm-4pm	Program Managers, CORS, & QA
31-Oct	Thursday	3pm-4pm	Residential & Crisis Residential Clinical/Nurses/Prescribers

SmartCare Functionality and Requirements

Recent Guidance and New Information

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Billing

Important Reminder

- **Billing in SmartCare has not yet commenced**; BHS will give you notice before we begin.
- Instructions for invoicing BHS were sent to the System of Care on Thursday 9/26

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Billing

Error Correction

- SmartCare allows for users to correct some service note errors in the EHR themselves, while others require assistance from the County
- For more information on errors users can correct themselves, see “Service Note Errors and How to Resolve” on the CalMHSA website
- For errors requiring County assistance, users may request error correction directly from within the EHR, see “How to Report an Error That Needs to Be Corrected”
- More specific information is forthcoming.

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Reports

Updates and Information

- BHS has formed a Reports Committee to prioritize report creation, determine gaps in the system, and and advise on needed reports
- The EHR project team, data sciences, and other reports teams now have access to SmartCare reports and are having daily meetings.
- Dashboards and canned reports are being prioritized
- State reporting data cleanup and readiness is in progress
- An initial reports crosswalk has been posted on the Optum website

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ASAM Reporting

All Youth Programs and Providers Not in SmartCare

- All SUD Programs that do not use SmartCare as their primary EHR for documentation must submit ASAM data to MIS every month.
- All programs who serve youth, regardless of their EHR, are required to provide ASAM data to MIS monthly for brief screenings only
- BHS has developed a process for ASAM submission to reduce dual entry and administrative burden.
- Instructions for submission and a reporting tool has been shared with the SOC and is on the Optum website.

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E-Prescribing: CalMHSA Rx

Details and Timeline

- Prior to go-live, it was believed that integration existed between CalMHSA Rx and SmartCare; at go-live BHS learned the integration does not exist.
- To fix this issue, doctors and registered nurses were given direct access to CalMHSA Rx; Doctors currently have access to prescribe medications and registered nurses currently have access to stage medications
- BHS is trying to provide access to LPHAs to view and document existing medications; the details at this time are unknown and will be shared ASAP.
- A one-page training is being developed by CalMHSA

SOC Resources

Where do I find resources?

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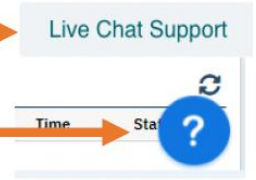

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Updated September 6, 2024

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

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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**.
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Q&A

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