Meeting Goals

Transparency

Engagement

Inclusion

Preparation

Meeting Agenda

- Recap

- Timeline & General Updates

- SmartCare Training

- Functionality and Requirements

- Go-Live Preparations

- SOC Actions

- SOC Resources

- Q&A

Recap

What did I miss in the last town hall?

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Recap

What did I miss in the last town hall?

- The most common issue with training completion: Staff are missing the mandatory Privacy and Security module because they are not scrolling down to the bottom of the screen

- Crisis Stabilization Units, Crisis Residential, and Residential programs **will need to enter bed assignments at go-live**

- A grid with planned changes for the existing SUDURM and UCRM forms is posted to the SmartCare tab of the Optum website

- Residential and CSU workflows were sent directly to providers. If you did not receive them, please contact Heather.Rey@sdcounty.ca.gov.

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Timeline & General Updates

High-level Information about the SmartCare implementation

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SmartCare Project Timeline

Key Dates

🚆 Required CalMHSA LMS Training	Jul 15 – Aug 2
🖥️ Site Lead Training	Jul 29 – Aug 2
🖥️ Site Lead Make Up Training Session	Aug 21
🚆 Optional Supplemental Training	Aug 5 – Aug 23
👤 Data Migration	Now – Aug 30
🚆 Required Supplemental Training (Residential / CSU)	Aug 26 – Aug 30
🚆 Recommended e-Prescribing Training (DrFirst)	Aug 19 – Sep 6
✈️ Go live:	Sep 1 – Sep 3

SmartCare Advisory Group

Continuation of activities

- Advisory Group meetings will continue through October to communicate issues, discuss questions about policy changes, and explore post-go live considerations or issues

- QA representatives from both the mental health and substance use disorder will participate going forward so everyone is on the same page for policy and procedure and any concerns with the SOC

SmartCare Training

Details, Timelines, Requirements

Required LMS Training Completion

Complete Required LMS Training ASAP

- The SmartCare LMS required training deadline was August 2.

- Required training must be completed before access to SmartCare is granted

- **Staff who do not have access to SmartCare at go-live should complete training as soon as possible to get access**.

- LMS training completion reports are being shared with site leads. Please monitor training for your program to ensure completion.

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Required LMS Training Completion

Complete Required LMS Training ASAP

- Starting on 8/21 users were sent one of three messages indicating whether they had completed the required training modules.

  - **Completed**: An account will be created and login instructions sent to you before/at Go-Live on 9/1. No action is needed

  - **Not Complete**: this is your notice to complete the required modules as soon as possible. Please follow the instructions in the email to address the deficiency

  - **Not Able to Match**: Your LMS completion cannot be determined. Please follow the instructions in the email to address the deficiency

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Supplemental Training: Overview

Details and Timeline

- Timeline

    - Optional Outpatient and Specialty Training | August 5 – August 23 | **(complete)**

    - Required Residential and CSU | August 26 – August 30 | **(register now!)**

    - Recommended DrFirst E-prescribing | August 19 – September 6 | **(register now!)**

- Ensure you have completed the required LMS Training Modules and passed the knowledge checks with a minimum 80% before enrolling

- Post go-live, training will go dark for approximately 2 weeks; new schedules are pending and will be communicated when available.

Once you have completed all required CalMHSA LMS Modules for your role, visit RegPack to register for additional training.

SMARTCARE REGPACK

Supplemental Training: Residential, Crisis Residential and CSU

Details and Timeline

- All users **required to take SmartCare Basics LMS** (90 minutes)

- All users **required to take Supplemental live training** as there is no CalMHSA LMS training or documentation for these modules

- Supplemental training will occur this week: August 26 – August 30

- New classes were added and class sizes increased to accommodate demand. Some enrollment requirements were lifted. **If users were unable to sign up for a session, please revisit RegPack**

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DrFirst Training

Recommended E-Prescriber Training

- All prescribers are recommended to take the DrFirst supplemental training in addition to the required LMS training (see role grid)

- Nurses who assist prescribers are recommended to take the DrFirst training

- The 2-hour virtual training occurs August 19 – September 6

    - Two of six available classes remain (9/5 and 9/6)

    - Encourage prescribers to register as soon as possible!

- To enroll, create an account and register for Regpack.

- Note: e-prescribing functionality does not exist in the TRAIN domain

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Scheduled Practice Sessions

Post Go-Live

- Quiet practice environment in a classroom setting with no agenda

- Focus is on navigating the system and practicing functions in TRAIN

- Practice sessions will take place September 3 – September 13 and are scheduled by role

  - Requires completion of SmartCare Basics for All Users

  - Registration is now open in RegPack!

Office Hours

Post Go-Live

- Like practice sessions, these are intended for program staff who know what function they want to perform, but unsure how to do it.

- Virtual office hours are available September 3 – September 13 and are scheduled by role
  - No pre-requisites to join
  - MS Teams meeting space
  - Drop-in only, no registration

Date	Day and Time	Virtual
Week 1		
3-Sep	Tuesday (3pm-4pm)	Residential and Crisis Residential Clinical/Nurses/Prescribers
4-Sep	Wednesday (9am-10am)	Nurses
4-Sep	Wednesday (3pm-4pm)	Clinical Direct Service
5-Sep	Thursday (3pm-4pm)	Program Managers, CORs, and QA
6-Sep	Friday (9am-10am)	Prescribers
Week 2		
9-Sep	Monday (9am-10am)	Residential and Crisis Residential Clerical
10-Sep	Tuesday (3pm-4pm)	CSU Clinical/Nurses/Prescribers
11-Sep	Wednesday (9am-10am)	Admin Billing Only
12-Sep	Thursday (3pm-4pm)	Admin Clerical Front Desk
13-Sep	Friday (9am-10am)	CSU Clerical

- An email with link to login to office hours is forthcoming

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Functionality and Requirements

Recent Guidance and New Information

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DrFirst is now CalMHSA Rx

New name at go-live

- The new **DrFirst** e-Rx software program integrated into the SmartCare EHR has a new name!

- It is now called **CalMHSA Rx**. You will see this new branding at go-live.

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DrFirst

Important information about tokens

- Prescribers who need to be set up to electronically prescribe controlled substances (EPCS) **must go through an identity proofing process** before prescribing medications

- Both **primary and backup tokens are required** in SmartCare

- **For primary tokens,** the County recommends prescribers use a cell phone, which requires installation of the Symantec VIP access app; t**he app cannot be installed on the laptop or desktop on which you are using SmartCare**

- For backup tokens, a hard token can be mailed, or a second cell phone or other device can be used

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DrFirst

Important information about registration

- Prescribers received an email on August 19 with an invitation to register for EPCS and **are encouraged to begin the account creation process immediately** to ensure access at go-live. **The full process will take approximately 1 hour**

- CalMHSA sent a follow-up email with instructions for registration, including the **installation of a soft token** for identity verification, and for **scheduling a required call with CalMHSA to verify credentials** and formally authenticate their account.

- If you did not receive this email, contact Chris Watson (CalMHSA) at chris.watson@calmhsa.org

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DrFirst

Important information about registration

- **Of Note:** Prescriber name in the NPI Registry must match DrFirst. If they do not match, the invitation fails.

- **Prescribers may need to verify their name and spelling in the NPI Registry.**

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Medication Migration

Updated medication migration information

- DrFirst uses the same prescription transmission software (SureScripts) as CCBH.

- Medications previously entered into the CCBH e-prescribing system should display in DrFirst, along with other medications prescribed to the client by any prescriber who is also using Surescripts, including those outside our SOC.

- **BHS has learned that medication history will not import from DrFirst to SmartCare in time for go-live. This means that they must be manually entered from DrFirst into SmartCare.**

SmartCare Login

Instructions for login at go-live

- An email will be sent to all users with username, URL, and instructions for a password reset no later than August 31, 2024.

- Process is similar to logging into the TRAIN environment

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Access Request Forms (ARFs)

- The SmartCare ARF is available and are posted to the Optum website.

- Communication is forthcoming

Client Name / Demographic Changes

Change for SUD SOC (this is already in place for MH)

- SmartCare employs a shared client record across the SOC; thus the BHS Health Information Management Services (HIMS) department will be managing significant client record changes.
- <u>**SOC staff are not to make changes to the following fields**</u>: **Name, DOB, SSN and Gender.**
    - Any changes to these fields need to be submitted to the HIMS department
- HIMS will also handle potential duplicate clients
- Additional information from the SUD QA team is forthcoming

Data Migration

Timeline and Data Re-entry Updates

- The last data migration to SmartCare before go-live is currently:

  - Last **client demographic data migration** for both CCBH and SanWITS is data entered through approximately **August 25 at 2:00pm**

  - Last **CCBH Clinical PDF data** (assessments, client plans, progress notes) was **July 31**

  - Last **CCBH PDF data migration for diagnosis, allergies, and medications** was **August 18**

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Data Migration

Timeline and Data Re-entry Updates

- Some **data will need to be reviewed and/or re-entered for data entered after the last migration date up to go-live :**

  - CCBH:

    - Demographic, active diagnosis, client ID, open authorizations, scheduled appointments must be re-entered

    - Medications, allergies, and problem lists must be re-entered

    - CCBH assessments and progress notes should be reviewed

  - SanWITS: Essential demographic and active diagnosis must be re-entered

Data Migration: New Clients

Go-Live Preparation & Communication

- Most **critical demographic data** (client information and assignment or episode for <u>new</u> **CCBH and SanWITS clients** are **planned to migrate through August 30 at 4:00pm.**

- BHS will attempt to manually enter clients created in the legacy systems after this time and before go-live

- **Please look for a communication from the project team before you add any new clients!**

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CCBH Safety Alerts

Safety alerts will not migrate to SmartCare

- CCBH Safety alerts will not migrate to SmartCare

- At go-live, safety alerts should be noted in the 'client flags' section of SmartCare

- Users should enter any safety alerts into this 'client flags' section to ensure they show for all users

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Authorizations

Requirements and Reminders

- Prior to submitting an authorization request to Optum, programs should create program enrollment or put a client in requested status for the requested level of care

- Then, authorizations will be completed on paper and submitted to Optum via fax or through their form.

- Optum will enter the Authorizations into the SmartCare system.

- Programs will be able to see the Authorizations in SmartCare

- Additional information will be shared this week.

DMC-ODS: ASAM

For SUD programs not using SmartCare

- On a monthly basis, legal entities not reporting client ASAM via SmartCare, shall track and submit client and ASAM data to MIS for reporting to DHCS

- MIS developed an Excel tracking log formatted with required data elements. All elements must be filled in. Each month, use a new/blank tracking log to submit to MIS

- Monthly submission is due to MIS by the 5th of each month for client/ASAM records for the previous calendar month

- Formal process was sent to the SOC with additional guidance.

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NOABD

Notice of Adverse Benefit Determination

▪ QA is responsible for monitoring program compliance with client rights, such as issuance of NOABD's

▪ NOABD's are on hold in SmartCare until we complete the process of updating templates in SmartCare and test functionality

▪ A revised tracking log was developed for use by MH and SUD SOC; programs shall track and submit client NOABD data to QA per the current process until the functionality exists in SmartCare

▪ Additional guidance was sent to the SOC this week

Document Scanning

Driver required in SmartCare

- An additional driver is needed for efficient scanning in SmartCare

- Providers who need scanning capabilities should install a new driver on applicable devices (*DynamicWebTWAINHTML5Edition.msi*)

- After installing, instructions for scanning directly into SmartCare can be found on the CalMHSA website.

- If a user does not have the new driver and needs to scan, a 2-step process is available (save a pdf to computer, then upload to SmartCare)

- Scanning has been validated using Google Chrome.

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Reports

Reports access not yet available, but in process

- SmartCare has robust reporting functionality, and while reports will look different, almost every field is reportable.

- Users can create and 'favorite' their own reports.

- BHS has not yet had access to all reports, so information at this time is incomplete.

- A reports crosswalk will be shared with the SOC. Note this is highly preliminary, and incomplete, but intended to provide an early look at available reports.

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SmartCare Program Crosswalk

Legacy System to SmartCare

- A crosswalk of programs from SanWITS or CCBH to SmartCare has been shared with the System of Care.

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Go-Live Preparations

Considerations as you prepare for go live

- Know <u>your</u> go-live date: Sept 1, Sept 2 (Labor Day), or Sept 3

- Track mandatory training completion

- Know your downtime procedures

- Be prepared for on-site login support (frequent issue at go-live)

Go-Live Preparations

Important Information for Immediately Prior to Go-Live

- **Stop using CCBH or SanWITS at midnight Saturday August 31 and use downtime processes until 0700 Sunday, September 1.**

Go-Live Preparations

- **On the day of your go-live, check your email before logging into the SmartCare system** for any final instructions, including go or no-go communications and data migration details.

- Be prepared to pivot back to CCBH and SanWITS, **or** to move to paper until further instructions.

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Go-Live Preparations

Considerations as you prepare for go live

- An email with recommendations will be sent right before go-live:

  - Before go-live:

    - Ensure staff have the correct URL for login

    - Ensure staff have the help desk support flyer, print for workstations

    - Print appointments for the first day of go-live on Friday 8/31 and compare to appointments in SmartCare upon arrival

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Go-Live Preparations

Considerations as you prepare for go live

- At go-live

  - Be prepared to support logins, including password resets

  - Review clients pushed on 8/31 to ensure they are in SmartCare

  - Manage missing clients

  - For residential programs, ensure clients have bed assignments

  - Have site leads attend twice daily calls

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Help Desk

Support for Go-Live Week

- Extended help desk hours available the first week of go-live (7:00am – 12:00am)

- Preferred order of contact: Chat → Ticket → Phone Call

- From midnight to 7:00am, system outage issues only
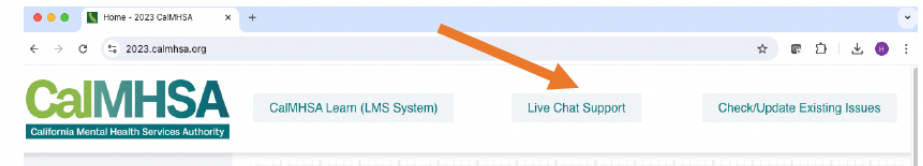
SmartCare Support Go-Live Week

Sunday, September 1 – Friday, September 6, 2024
7:00 am – 12:00 am

SmartCare support during go-live week is offered by CalMHSA as follows and in order of preferred contact:
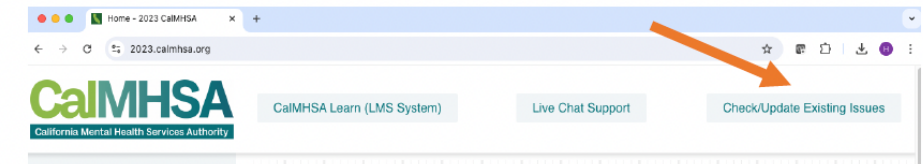
1. **Connect via Live Chat**
   Live Chat can be accessed via 2023.calmhsa.org

2. **Submit a Ticket**
   A ticket can be created by:
   - Emailing calmhsa.sandiego@Buchanan-mail.onbmc.com
   - Submitting a ticket via 2023.calmhsa.org

3. **Call (833) 686-6801**
   - Available during designated live support hours

Note: Between midnight and 7:00 am, the only support available is for system outages. Call (916) 214-8348

Updated August 20, 2024

Manage Expectations

- Go-Lives are **always** bumpy rides

- You (and everyone else) will not be an expert at go-live

- No one will feel comfortable or like they "know what they are doing"

- Expectations and reality may be at odds

- Fits and starts we may need to pivot or change course; prepare yourself and others for the inevitable.

- Be optimistic and be resilient: frustrations will run high

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SOC Actions

What can you do now to prepare?

SOC Actions

What should the SOC do now to prepare?

- Ensure all SmartCare users at your site **complete required training** as soon as possible

- Ensure **prescribers go through the registration** / identity-verification process ASAP for EPCS.

- **Orient new hires 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.

- **Ensure your site lead is oriented to onsite plans** for downtime and go-live.

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SOC Actions

What should the SOC do now to prepare?

- **Read and share all SmartCare emails**

- **Review all guidance and info notices** in preparation for go-live.

- **Communicate with your staff** to raise their awareness

- Visit the CalMHSA website to **review SmartCare materials** (**https://2023.calmhsa.org**)
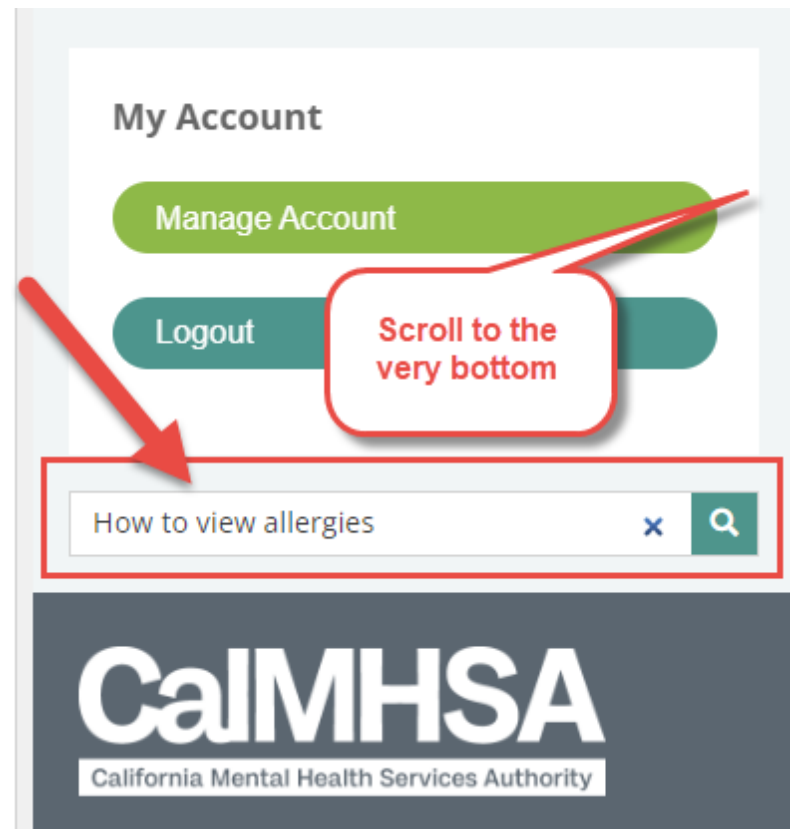
SOC Resources

Where do I find resources?

Workflow & SmartCare Resources

Where can I find resources and information?

- BHS is receiving a lot of questions regarding workflow, SmartCare features, etc. that can be answered from the documentation available on the CalMHSA site: https://2023.calmhsa.org/

- If you have questions, Please visit and use the search tool at the very bottom of the toolbar on the left. It will search the entire CalMHSA site!

Workflow Resources

Where can I find resources and information?

- BHS has also shared several resources with information relevant to workflows:

  - Then and Now: Guidance comparing legacy system process to SmartCare

  - MH + SUD Workflows: Document outlining high level workflows for MH and SUD SOC

  - Walk-in Workflow: For providers with a specific walk-in clinic

  - Standalone Service Workflow: SUD providers only

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

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Go-Live

For programs with night and weekend hours (including residential):

Sunday, September 1, 6:00 am

For programs with regular business hours:

Tuesday, September 3, 6:00 am

Q&A

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

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

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