



To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	August 23, 2024
Title	Summary of SmartCare Implementation Updates

SmartCare will be implemented as the electronic health record (EHR) for both the mental health (MH) and substance use disorder (SUD) systems of care (SOC) on September 1, 2024. This information notice serves as a summary of recent guidance shared with the SOC in preparation for go-live.

TRAINING

SMARTCARE EHR TRAINING UPDATES

The SmartCare LMS required training deadline for all users except residential, crisis stabilization unit (CSU), and e-prescribers was August 2, 2024. The required training must be completed before access to SmartCare is granted. BHS cannot commit to extensions for staff who did not complete the LMS training timely to ensure access to SmartCare at go-live. Required LMS training is role-based and offered on-demand. LMS training completion reports are shared with site leads. Please monitor required training completion for your program to ensure access as close to go-live as possible.

The most common issue with training completion has been that staff are missing the mandatory Privacy and Security Module. Please remind staff to scroll to the bottom of the training screen.

Enrollment for supplemental training, designed to provide extra instruction in a live training environment, is now open for all classes. Space is available – please encourage your staff to attend.

- Optional Outpatient and Specialty Training | August 5 – August 23
- Required Residential and CSU Training | August 26 – August 30
- Recommended DrFirst e-prescribing Training | August 19 – September 6

SmartCare Training Registration Tip Sheet can be found on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

An updated Training by Role Grid was shared with the SOC on July 30, 2024 and can be found on the SmartCare tab of the Optum website on the [MHP Provider Documents](#) page or [DMC-ODS page](#). Of note:

- Staff who handle billing functions are strongly recommended to take supplemental training.
- Program managers and/or other staff who need to know both admin and clinical workflows are strongly recommended to take supplemental trainings.
- Residential, crisis residential, and CSU users are required to take supplemental training because there is no CalMHSA LMS training or documentation for these modules.

For More Information:

- Check the SmartCare tab on the Optum website under [MHP Provider Documents](#) for the MH SOC or [DMC-ODS Provider Documents](#) for the SUD SOC.
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- Electronic Prescribing training is strongly recommended. Prescribers are advised to take the e-prescriber training as soon as available as there may be a gap with future trainings not occurring until 1-2 weeks after go-live. An email was sent to the SOC on August 13, 2024, with guidance on how to register for DrFirst.

REQUIREMENTS AND FUNCTIONALITY

ELECTRONIC PRESCRIBING

Behavioral Health Services (BHS) will implement a new electronic prescribing (e-prescribing) component with SmartCare go-live called **DrFirst**. DrFirst uses a medication management software called Rcopia that will seamlessly integrate with SmartCare for e-prescribing, meaning no additional login will be required. Doctors who will use SmartCare to e-prescribe will use DrFirst.

Prescribers and nurses who stage medications for prescribers will also have access to DrFirst. Prescribers who need to be set up to electronically prescribe controlled substances (EPCS) must additionally go through an identity proofing process before prescribing medications. **For those prescribing controlled substances, a soft or hard token must be established with their account. Both primary and backup tokens are required in SmartCare.**

Guidance for onboarding, tokens, and training was shared on August 16, 2024 with the System of Care, and can be found on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

MEDICATION MIGRATION

While it was previously communicated that medication history could populate from DrFirst to SmartCare, BHS has learned that **medications will not import in time for go-live**. This means that they must be manually entered by doctors or printed by doctors and entered by nurses.

BED ASSIGNMENTS

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

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SMARTCARE LOGIN

All users will receive an email with username, URL, and instructions for a password reset right before go-live. The process will be similar to logging into the TRAIN environment.

AUTHORIZATIONS

Authorizations will be completed on paper and submitted to Optum via fax or through their form. Optum will then enter the Authorizations into the SmartCare system. Programs will be able to see the Authorizations in SmartCare. Additional information will be shared as soon as it is available.

CHANGES TO UNIFORM RECORDS MANUALS

There are numerous forms built into SanWITS and CCBH that the SOC must complete. In SmartCare, there are significantly fewer forms. As a result, BHS is planning to sunset multiple existing forms, and create new forms to align with SmartCare data entry. UCRM and SUDURM guidance has been shared with the SOC and is available on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

DMC-ODS: ASAM

ASAM entry will be completed via a spreadsheet submission. Additional detail on the process for submission is coming soon.

DOCUMENT SCANNING

BHS has learned that an additional driver is needed for efficient document scanning in SmartCare. The additional driver will allow for a single step process for end users to scan documents directly into SmartCare. **Providers who need scanning capabilities should install a new driver on applicable devices.**

The new driver is called *DynamicWebTWAINHTML5Edition.msi*. After installing the new driver on computers, instructions for scanning directly into SmartCare can be found [here on the CalMHSA website](#). If a user attempts to scan a document into SmartCare, they will be prompted to install the new driver.

If a user does not have a new driver installed on their computer but needs to scan into SmartCare, a two-step process is available, which requires saving a PDF to the user’s computer before uploading to SmartCare. Instructions for this two-step process can be found [here on the CalMHSA website](#).

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For County-operated programs, BHS is attempting to install the new driver in time for go-live, but end users should be prepared to follow the two-step process if necessary.

Scanning has been validated using Google Chrome. Other browsers have not been validated at this time.

ADDITIONAL GUIDANCE PREVIOUSLY SHARED WITH THE SOC

- **Then and Now EHR Functionality** assists users with navigating new options in SmartCare while ensuring compliance with regulations and requirements: [DMC-ODS link](#) | [MHP Provider Documents Link](#)
- **SUD and MH Workflows document** outlines new workflows for the SOC including naming and tips for navigation: [DMC-ODS link](#) | [MHP Provider Documents Link](#)
- **SmartCare Non-Billable Procedure Codes for SUD and MH SOC** highlights all nonbillable actions that can be entered into the SmartCare system: [DMC-ODS link](#) | [MHP Provider Documents Link](#)
- **Hardware Software, and Network Requirements – March 2024:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Client Insurance Entry Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Entry of CANS and PSC into SmartCare Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **SmartCare Data Migration Guidance (Updated August 2024):** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **[CCBH Training and Documentation Guidance](#)**, summarizes program actions for both new hires and current CCBH users after June 26, 2024.
- **[SanWITS Training and Documentation Guidance](#)**, summarizes program actions for both new hires and current SanWITS users after July 17, 2024.

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GO-LIVE PREPARATIONS

CONSIDERATIONS FOR GO-LIVE PREPARATION

The following considerations are intended to help you prepare your site for go-live:

1. **Know your go-live date.** Based on your hours of operation, go-live will be on September 1, September 2 (Labor Day), or September 3.
2. **Track mandatory training completion** and encourage optional supplementary training participation. **Ensure all staff have completed mandatory trainings as soon as possible to ensure access at go-live.**
3. If applicable, seek approval to **download the Symantec VIP access application** for prescribers.
4. **Know your downtime procedures** and ensure your program management and site leads are prepared for go-live at each facility.
5. **Orient new hires on downtime forms** after CCBH and SanWITS training ceases and before SmartCare go-live.
6. **Be prepared for on-site login support;** this is one of the most frequent issues during a go-live.
7. If applicable, **print the schedule for the next two weeks** and consider printing Fact Sheets or Client Profile.
8. **Know where to go for help** and leverage the extra knowledge gained by site leads through their participation. Site leads will receive guidance summarizing where to go for help depending on the situation.

MANAGE EXPECTATIONS

In communication with staff, it is important to manage expectations. The following messages may be helpful in your on-site preparations.

- Go-lives are always bumpy rides
- You (and everyone else) will not be an expert at go-live
- It is normal to feel uncomfortable and uncertain during these types of transitions
- Expectations and reality may be at odds
- 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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ADDITIONAL INFORMATION

WHAT ELSE SHOULD THE SOC DO NOW TO PREPARE?

- 1. Maintain your own awareness about project status to prepare for SmartCare go-live.**
 - This includes continued review of status updates and other materials available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website, participate in town halls, and discussions with your COR or supervisor.
- 2. Communicate early and often with your staff** to raise awareness about the magnitude of change they can expect.
- 3. Review the SmartCare FAQs.**
 - Numerous questions have already been asked via SmartCare town halls and other venues.
 - Please review these FAQs, available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website.
- 4. Visit the EHR Knowledge Base on the [CalMHSA website](#).**
 - Numerous tools are available on the website for your review to begin familiarizing yourself with the SmartCare product. You will find training guides, videos, at-a-glance workflows, FAQs, and more.
 - Providers are strongly encouraged to review these materials.

KEY UPCOMING DATES

SOC Town Hall (Virtual)

- **August 27, 2024** | 1:00pm – 2:00pm [Click here to join this meeting](#)

Training

- **August 5 – August 23, 2024** | Optional Supplementary SmartCare Classroom or Online Virtual Training
- **August 26 – August 30, 2024** | Required Supplementary SmartCare Classroom or Online Virtual Training for Residential or CSU users
- **August 19 – September 6, 2024** | Recommended E-Prescribing Training
- **September 1 – September 6, 2024** | Optional SmartCare Classroom or Online Virtual Support

Go-Live

- **September 1, 2024**

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