



To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	November 5, 2024
Title	Summary of SmartCare Post Go-Live Updates

This information notice contains both new guidance and a summary of recent guidance related to the SmartCare electronic health record (EHR) for both the mental health (MH) and substance use disorder (SUD) systems of care (SOC), inclusive of the following:

- **Requirements and Functionality:**
 - Multi-Factor Authentication (MFA)
 - Annual updates for CalOMS Providers
 - Entry of Services
 - Reminder not to document in CCBH
 - Creating services in SmartCare for 24-hour programs
 - ASAM reporting for youth programs and SUD providers not in SmartCare
 - Reports updates
 - E-prescribing: CalMHSA Rx
 - Billing updates
- **SmartCare Access and Training**
 - Updates regarding access
 - Updates regarding training
 - November technical support hours (formerly office hours)
- **Help Desk and Support Reminders**
 - Issue reporting
 - Resources for workflow and documentation questions
- **Additional Information**
 - Site leads
 - SmartCare Advisory Group
 - Key upcoming dates

REQUIREMENTS AND FUNCTIONALITY

MULTI-FACTOR AUTHENTICATION (MFA)

To assure the best possible security of our client’s data, the County will be rolling out multi-factor authentication (MFA) to all contractor users. This means that after you enter your user ID and password, you’ll receive an email with a one-time code that you will need to enter before gaining access into the system. You will use this MFA each time you access SmartCare. Please confirm the email

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address in your SmartCare profile is accurate to avoid access issues and delays. To verify and/or update your email address, access the ‘My Preferences’ screen, ‘Contacts’ section. If you have any trouble updating your email address or need help, please contact the CalMHSA Help Desk by following the instructions on the help desk flyer located on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

ANNUAL UPDATES FOR CALOMS PROVIDERS

Previous instruction was provided by CalOMS representatives to input annual updates on paper for admission dates in October and November. **Programs should now proceed to enter the annual updates previously captured on paper directly into SmartCare for admission dates in October and November 2018 to 2023.** The annual update must be completed 10 to 11 months from the admission date. For example, for a client admitted in October 2018, the annual update is due by September.

When entering annual updates into SmartCare, please follow these steps:

1. Change the effective date to the date the annual update was conducted with the client; SmartCare autogenerates to the current date.
2. Make sure the Fully Specified Name (FSN) matches from the admission record.
3. Manually input the annual update number into SmartCare based on the year of the admission date. For example, if the admission date is 10/01/2021, the annual update number for 2024 is 3.
4. Review all of the information.
5. Save and Sign.

Please report to Bianca Lopez at bianca.lopez@sdcounty.ca.gov upon completion of these records in SmartCare.

ENTRY OF SERVICES

Programs should NOT enter any services into CCBH or SanWITS for dates of service after 8/31/2024. Any services entered in CCBH or SanWITS with dates of service 9/1/2024 or later will need to be re-entered into SmartCare to avoid billing impacts. **BHS will be contacting programs to fix services entered incorrectly. Services entered in the wrong system will not be paid.**

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REMINDER TO NOT DOCUMENT IN CCBH

As new clients are opened to programs in SmartCare, providers may need to view historical information in CCBH. Currently, most providers have access in CCBH to view information for clients who have been opened to the provider’s program. If needed, the provider 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 is reviewed. **Providers should not complete any intake documentation or update any client information in CCBH**, this path is solely for view only. The only exception to documentation in CCBH is if providers need to update information related to billing if the service shows on a suspense report.

CREATING SERVICES IN SMARTCARE FOR 24-HOUR PROGRAMS (RESIDENTIAL)

24-Hour programs bill automatically from the Residential Board (Residential/Crisis Residential) via the nightly job in SmartCare. Services for these facilities should not be entered by admin staff via the Services (Client) screen. Services entered in this manner will cause errors in billing for the service.

If a client enrolled in a 24-Hour program is to be seen at a Crisis Stabilization Unit (CSU), leave the client in current status and do not mark “on leave.” Documentation should note that the client was seen at a CSU and how long they were away from the facility. A day remains billable as long as minimum service provision noted in regulations is met.

ASAM REPORTING FOR 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 have been shared with the SOC and is available [on the Optum website](#).

REPORTS UPDATES

BHS has formed a Reports Committee to prioritize report creation, determine gaps in the system, 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, and State reporting data cleanup and readiness is in progress. An initial reports crosswalk has been posted on the Optum website for [CCBH to SmartCare](#) and [SanWITS to SmartCare](#).

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E-PRESCRIBING: CALMHSA RX

Prior to go-live, it was believed that integration existed between CalMHSA Rx and SmartCare; at go-live BHS learned this 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 Licensed Practitioners of Healing Arts (LPHAs) to view and to document existing medications; the details at this time are still unknown and will be shared with the SOC as soon as possible.

BILLING UPDATES

Some billing functionalities have not yet been turned on in SmartCare but is forthcoming. BHS will start by turning on nightly billing jobs that will assist programs with identifying service errors and will prepare us to eventually generate claims, which will come later. To be clear, we do not have a date yet for either the nightly billing jobs or the subsequent claim generation but are hoping to turn on the nightly billing jobs soon. We will provide programs with instructions on how to identify and correct service errors forthwith.

SMARTCARE ACCESS AND TRAINING

UPDATES REGARDING ACCESS

BHS recognizes that SmartCare system access has been a significant challenge and is taking steps to remediate. There have been problems with users having the correct role-based access. BHS is currently working through a process to review each role in detail to ensure the correct access to SmartCare for all users. Updates will be shared as they become available.

An [Access Request Form \(ARF\) for Treatment Programs](#) or an [Access Request Form \(ARF\) for BHS or Optum Staff](#) is needed to secure access to SmartCare either for new users, user modifications, and updates. Users should submit via the instructions on the ARF form. The turnaround time for processing ARFs is currently 5-10 days. BHS is working as quickly as possible to complete ARF requests; please remain patient and do not submit multiple emails.

UPDATES REGARDING TRAINING

All new users must also complete all required trainings. For most roles, required training is available through the [CalMHSA LMS system](#) with optional supplemental instruction offered by Optum. For residential, crisis residential, and crisis stabilization unit users, live in-person training is required for

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access to SmartCare, also provided by Optum. See the [Optum SmartCare Training](#) webpage for training dates and registration. For questions, contact sdu_sdtraining@optum.com.

NOVEMBER TECHNICAL SUPPORT HOURS

To continue supporting users in SmartCare, 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. These are intended for program staff who know what function they want to perform in SmartCare and would like a refresher on how to do it. Optum staff won't be advising program staff what they should do in the system, nor will they resolve live access issues or elevate system issues.

The following Technical Support Hours are available, and users can drop in by joining this MS Teams Link: [Click Here](#)

Date	Day	Time	Technical Support Hours
30-Oct	Wednesday	3pm-4pm	Program Managers, CORS, & QA
31-Oct	Thursday	3pm-4pm	Residential & Crisis Residential Clinical/Nurses/Prescribers
5-Nov	Tuesday	2pm-3pm	CSU Clinical/Nurses/Prescribers
6-Nov	Wednesday	2pm-3pm	CSU Admin/Clerical
7-Nov	Thursday	2pm-3pm	Outpatient Admin Clerical Front Desk
12-Nov	Tuesday	2pm-3pm	Outpatient Prescribers
13-Nov	Wednesday	2pm-3pm	Program Managers, CORS, & QA
14-Nov	Thursday	2pm-3pm	Outpatient Nurses
18-Nov	Monday	2pm-3pm	Residential & Crisis Residential Admin/Clerical
19-Nov	Tuesday	2pm-3pm	Admin Billing Only
20-Nov	Wednesday	2pm-3pm	Outpatient Clinical Direct Services
21-Nov	Thursday	2pm-3pm	Outpatient Prescribers
25-Nov	Monday	2pm-3pm	Residential & Crisis Residential Clinical/Nurses/Prescribers
26-Nov	Tuesday	2pm-3pm	CSU Clinical/Nurses/Prescribers
27-Nov	Wednesday	2pm-3pm	CSU Admin/Clerical

For questions, contact sdu_sdtraining@optum.com.

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HELP DESK AND SUPPORT REMINDERS

ISSUE REPORTING

Users should contact the CalMHSA SmartCare help desk as the first step for all SmartCare issues and concerns. The help desk is available Monday through Friday, 7:00 am to 7:00 pm. The preferred order of contact is connecting via live chat, followed by submitting a ticket, and finally a phone call. Outside of normal business hours, a phone line is available for system outages only. For more details please see the help desk flyer on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

The exception to reaching out directly to the CalMHSA SmartCare help desk is if an ARF is submitted. **If you know you need to submit an ARF for access to SmartCare, complete the ARF form available on the [Optum website](#) and send directly to MIS at BHS_EHRAccessRequest.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.

The QIMatters.HHSA@sdcounty.ca.gov email address should be used now only for clinically related questions (as with CCBH and SanWITS).

RESOURCES FOR WORKFLOW AND DOCUMENTATION QUESTIONS

Numerous SmartCare resources are available to assist you with workflow and documentation questions. These include the [CalMHSA Knowledge Base](#), access to help from directly within SmartCare, and San Diego specific resources on the Optum website. Please see the second page of the help desk flyer on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website for instructions to access resources.

ADDITIONAL INFORMATION

SITE LEADS

A survey was sent to the site leads to capture feedback in lieu of a 30-day check-in in late September, with only 10% responding. A follow-up email was sent to site leads to assess whether there would be value in a 60-day check-in meeting or if the Town Halls and other forums are meeting current needs. Based on these responses and feedback from the SmartCare Advisory Group, additional site lead

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touchpoints will not be scheduled. For questions related to site leads, contact Timmy at politimy.paraskevopoulos@sdcounty.ca.gov.

SMARTCARE ADVISORY GROUP

Advisory Group meetings will continue through December to communicate issues, discuss questions about policy changes, and explore post-go live considerations or issues. QA representatives from both mental health and substance use disorder programs are participating to ensure alignment on policy and procedure and to share any concerns on behalf of the SOC. The purpose of these meetings is to share information, collaborate with decision-making representatives from the system of care, and facilitate alignment under one BHS system of care.

KEY UPCOMING DATES

Town Hall

- **Tuesday, November 12, 2024 at 10:00 am** | [Click here to join the meeting](#)
- **Tuesday, December 17, 2024 at 2:00 pm** | [Click here to join the meeting](#)

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