

# SmartCare User Group

County of San Diego  
Behavioral Health Services

June 23, 2026



LIVE WELL  
SAN DIEGO

# Meeting Goals



Transparency



Engagement



Inclusion

# Meeting Agenda



- Meeting Goals
- Updates
  - Clinical
  - MIS
  - Data Sciences
  - Billing
- Q&A



# Who to Contact?



SmartCare System issues: i.e. glitches, functionality issues, pop up errors

CalMHSA various options:

1. Connect via Live Chat (Monday - Friday 8:00 am - 5:00 pm)
  - Can be accessed via [2023.calmhsa.org](https://2023.calmhsa.org)
  - Also available when logged into the SmartCare EHR
2. Submit a ticket (Monday - Friday 8:00 am - 5:00 pm)
  - by accessing [2023.calmhsa.org](https://2023.calmhsa.org)
  - by logging into SmartCare
3. After-hours support (only available for system outages)
  - Call (916) 214-8348

SmartCare ARF submission and any access related issues or questions

[BHS\\_EHRAccessRequest.HHSA@sdcounty.ca.gov](mailto:BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov)

SmartCare Support questions that cannot be addressed by the CalMHSA Support Desk to be directed to this email.

[BHS\\_EHRSupport.HHSA@sdcounty.ca.gov](mailto:BHS_EHRSupport.HHSA@sdcounty.ca.gov)

For questions related to documentation, guidelines or policy

[QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)

Billing Issues or Questions that can't be addressed by the CalMHSA Help Desk

[MHBillingUnit.HHSA@sdcounty.ca.gov](mailto:MHBillingUnit.HHSA@sdcounty.ca.gov)

[ADSBillingUnit.HHSA@sdcounty.ca.gov](mailto:ADSBillingUnit.HHSA@sdcounty.ca.gov)

MH Billing line: 619-338-2612

SUD Billing line: 619-338-2584

Reports & Data Centralized E-mail support:

[BHS-DataScience.HHSA@sdcounty.ca.gov](mailto:BHS-DataScience.HHSA@sdcounty.ca.gov)

Password Resets and Account Unlock Needs

Call 1-800-834-3792 (Available daily from 4:30 am - 11:00 pm including weekends and holidays)



# Clinical Updates

Jill Michalski, EHR Project Team, Clinical Lead

Eileen Quinn-O'Malley, EHR Project Team, Chief, Agency Operations

# Reminder! Mode of Delivery (MOD) Choose Carefully!



## Mode of Delivery (MOD) options in SmartCare

- Identifies specific service(s) or (interventions) which are part of specific service delivery requirements
- Links required billing modifiers to procedures/procedure codes

## New Mode of Delivery (MOD) options for BH-Connect EBPs

- **BHC Monthly Bundle**
  - **Only** used by programs who are providing one of the BH Connect EBPs that can claim monthly bundled rates for their services.
  - ACT/FACT, CSC FEP, IPS, MST, HFW
- **PCIT International**
  - For use only by Providers currently certified by PCIT International who are employed in a program contracted to provide and claim PCIT modifier.
    - Please reach out to your COR if you need further clarification.



# New BHSA Housing Priority Populations Tracking Requirements



## New BHSA Housing Special Populations

- Homeless – Chronic
- Homeless – Living in an Encampment
- These Special Populations can be backdated to the start of the special population (when client began experiencing homelessness)
- Client can have multiple special populations at the same time.
  - A client can have both “Homeless-Chronic” and “Homelessness – Living in an Encampment” during the same time period.

## Problem List - Z codes Z59.0 – Z59.819

- Attached to every service note
- Easy workflow to update
- No limitations on who can access it
- Updatable over time – can see changes over time

# Homelessness Status Tracking via the Problem List



## Documenting Homelessness Status

Status	Z Code	Description
Homelessness documented, shelter status unknown	Z59.00	Use when homelessness is confirmed but details about sheltered vs. unsheltered are unavailable.
Currently homeless, living in a shelter or transitional housing program	Z59.01	Applies to emergency shelters, transitional housing, or similar programs. Do NOT use for tents or abandoned buildings.
Currently homeless, living outdoors (street, encampment, vehicle, abandoned building)	Z59.02	Use for unsheltered environments including encampments, cars or makeshift outdoor structures.

# Homelessness Status Tracking via the Problem List



## Documenting Risk of Homelessness

Status	Z Code	Description
Housed but at imminent risk of homelessness (within 30 day)	Z59.811	Use when client reports risk of losing housing soon (e.g., eviction notice, lease ending without alternative).
Housed but was homeless in the past 12 months	Z59.812	Use when client has recent homelessness history and is currently housed.
Housed but housing situation unstable (details unclear)	Z59.819	Use when housing instability exists but specifics are unknown.

# Homelessness Status Tracking



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What was client's housing status at time of enrollment into your program?

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If they were homeless or at risk of homelessness at that time, **add the appropriate Z-code to their problem list**, backdated

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If they were chronically homeless prior to program entry, **add the special population flag(s)**

- Client is experiencing chronic homelessness. Currently living in an encampment and receiving MHP services through an outpatient program, including housing supports:

## Problem List

- Add Z59.02 (Currently homeless, living outdoors)

## Special Populations

- Add Chronic Homelessness
- Add Living in an Encampment

- Client is at risk of homelessness. They begin outpatient SUD treatment and will be supported in obtaining interim recovery housing:

## Problem List

- Add Z59.819 (Housed, but housing situation unstable)

# Problem List



- Problems list may include symptoms, conditions, diagnoses, **social drivers**, and/or risk factors identified through assessment, psychiatric evaluation, crisis encounters, or other types of service encounters and is **developed by the provider**.
  - Problem lists should be updated throughout the course of treatment by members of the client's care team
  - The problem list may also include other issues that are self-reported by the client or identified by other health care providers
  - Problem lists support continuity of care between providers
- Providers may add problems to the problem list that are outside their scope of practice, including but not limited to physical health conditions, if they are reported to the provider by the client or another qualified professional.
- Problem lists are client-level documents shared across programs and providers
  - If a client is open to more than one program concurrently, there should be coordination between programs/providers before ending problems that were added by the other program
- Purpose and Benefits
  - Continuity of Care
  - Communication Tool
  - Data utility
  - Workflow integration

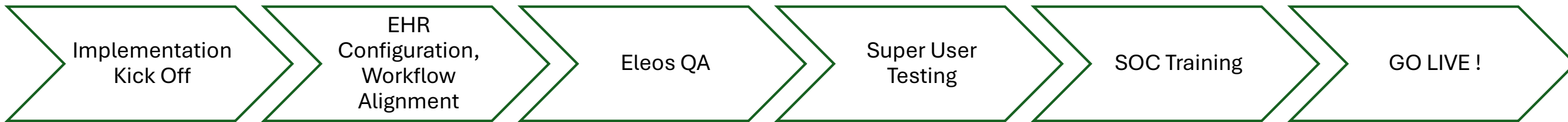


## Ambient AI Scribe for Behavioral Health

# Eleos Kick-off!

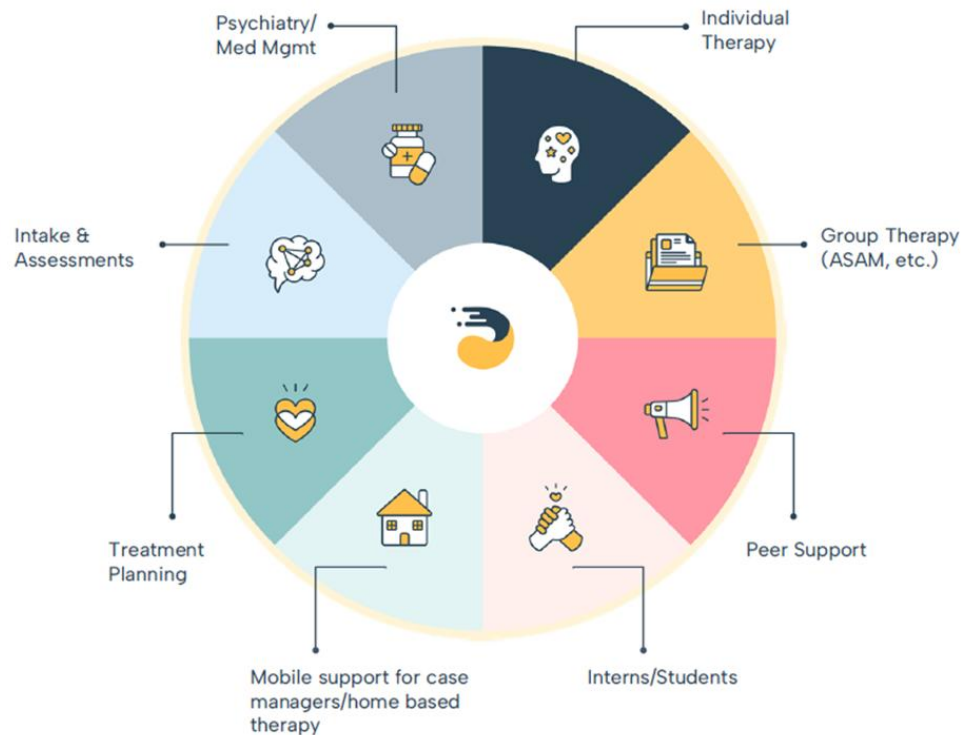


## Eleos Implementation Kick-off 6/23/26



6-8 weeks from Implementation kickoff to Go Live

# Eleos SmartScribe



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## Eleos SmartScribe – documentation tool

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70% average reduction in documentation time

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90% of Eleos users report less daily stress due to documentation demands – improves retention

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2+ additional interventions mentioned in each note leading to increased note quality

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2x higher client engagement leading to fewer no shows, progress towards goals

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## Live Quality Assist

- Compliance guidance directly in documentation workflow
- Real-time prompts to identify potential gaps and reinforce documentation compliance before note completion
  - Completeness
  - Interventions used
  - Progress
  - Plan of care
  - Client response
- Reduce post-submission corrections
- Active training for providers



## Compliance Dashboard

- Automatically scans every note for real-time compliance checks
- Uniqueness – identify notes that contain duplicate or copied-and-pasted content
- Completeness – missing fields, sparse entries
- Interventions Used – therapeutic interventions are documented
- Progress mentions
- Compliant plan – verify the note includes plan of action for next session
- Client Response to provided intervention
- Golden Thread – validates connection between documentation, services rendered and client's care plan



# Eleos Implementation Planning



- On 6/9/26 BHS Communication sent to all Contracted Provider Legal Entities requesting Expression of Interest from organizations that that may wish to utilize Eleos and list of anticipated Eleos users
  - Smartsheet link was provided for Program Managers to identify anticipated Eleos users for each program and submit to BHS via Smartsheet link **no later than June 16, 2026.**
  - Please reach out to your LE if you did not receive communication regarding Eleos
- Organizations not currently using Smartcare for clinical documentation but are interested in doing so to leverage the integrated Eleos platform may contact QI Matters at [QIMatters.hhsa@sdcounty.ca.gov](mailto:QIMatters.hhsa@sdcounty.ca.gov) - use subject line: "Eleos"
- Additional information regarding onboarding, training, access provisioning and roll out timelines will be communicated



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# SmartCare Changes

# Documents (Client) Screen Filter Updates



- There has been an update to the Documents (Client) Filter Options in SmartCare PROD.
- Providers must first select the Program from the “All Programs” dropdown which will then populate the Program Assignments for that program.
- This will filter the documents by the specific program assignment in use cases where the client may have multiple assignments to a program.

The screenshot shows the filter interface for "Documents (64)". The filters include:

- All Authors...
- All Documents (dropdown)
- All Statuses (dropdown)
- Due in X days (dropdown)
- All Document Categories (dropdown)
- Other (dropdown)
- Apply Filter (button)
- Last 1 Year (dropdown)
- Include errored documents (checkbox)
- From 06/18/2025 (calendar icon) To 06/18/2026 (calendar icon)
- Include External Documents (checkbox)
- All Programs (dropdown) - A red arrow labeled "1" points to this dropdown.
- All Program Assignments (dropdown) - A red arrow labeled "2" points to this dropdown.



# CalAIM Assessment Document Name Change



CalAIM Assessment name change → Mental Health Assessment (Client)

- Change effective 6/1/26
- This change is intended to better reflect its use for SMHS and reduce confusion for new users
- CalMHSA will be updating their Knowledge Base articles, LMS courses and other training materials to reflect this name change.
- Previously completing CalAIM Assessments will still reflect that name on the PDF in SmartCare – going forward PDFs will reflect the new name.

# SUD Assessment Procedure Code Display Names



- Effective June 12, 2026
- Display names of SUD assessment-related procedure codes updated to better align with DMC-ODS Service Table.
- Display name only change – rates, documentation requirements, authorized users and historical data are not affected

Code	Previous Display Name	New Display Name
H0001	SUD Screening	SUD Assessment
G2011, G3096, G3097	ASAM or other structured SUD assessment	SUD Structured Assessment (not tobacco)
H0049	Alcohol or Drug Screening	SUD Screening



# Management Information Systems (MIS)

Adrian Escamilla, Becky Ferry-Rutkoff

SmartCare Support: [BHS\\_EHRSupport.HHSA@sdcounty.ca.gov](mailto:BHS_EHRSupport.HHSA@sdcounty.ca.gov)

SmartCare Access/ARFs: [BHS\\_EHRAccessRequest.HHSA@sdcounty.ca.gov](mailto:BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov)

# Staff Administration



- All Access Request Forms have been revised with a revision date of 5/20/26; older versions will no longer be accepted
- The timeline to implement the new Credentialing completion requirement prior to granting SmartCare access is being reassessed.
  - Previously go-live was set for July 1, 2026.

# Residential Programs



## Residential (My Office) Screen – MH and SUD

- A residential/inpatient program should not admit a client if the client is currently enrolled in another residential/inpatient program.
- If a client is currently enrolled in a residential/inpatient program, the new program must reach out to the existing program and ask that the client be discharged or placed on leave. **Do Not admit the client until this is completed.**

## Residential (My Office) Screen – SUD

- A 3.5 client does not need to be enrolled in 3.1 and transferred. The client can be admitted directly to 3.5. Please refer to the [SUD Residential Level of Care Tip Sheet](#) located on the Optum website.

# Residential Programs Cont.



## Program defaults to 3.1

**Activity**

--- [blurred]

Status: Occupied      Disposition:

Action: [dropdown]

**Program:** CRASH 3.1 Golden Hill Hse [dropdown]

Bed: CRASH Golden Hill House Room 03 - 1T [dropdown] [Bed Search...](#)

Unit: CRASH Golden Hill House

Room: 03

Assignment Type: [dropdown]      Reason: [dropdown]

Location: Residential Subm      Billing Procedure: Residential Treatment

Clinician: [input]      Physician: [input]

## Change Program to 3.5

**Activity**

--- [blurred]

Status: Occupied      Disposition:

Action: [dropdown]

**Program:** CRASH 3.5 Golden Hill Hse [dropdown]

Bed: CRASH Golden Hill House Room 03 - 1T [dropdown] [Bed Search...](#)

Unit: CRASH Golden Hill House

Room: 03

Assignment Type: [dropdown]      Reason: [dropdown]

Location: [dropdown]      Billing Procedure: [dropdown]

Clinician: [input]      Physician: [input]

## CalOMS Cleanup Project

- Started June 5, 2026
- To correct records and resubmit to the State: Requires signature, missing admissions, missing discharges, annual update sequence number, etc.
- Assistance from the Optum Support Team

# In Progress Projects



- Access Request Form Updates - Ongoing
- MCO Improvements - Ongoing
- State Reporting Improvements – Ongoing
- Connex Data Sharing/ADT Dashboard/Prior Auth - Year End
- LOCUS: New Assessment Form – Year End
- Historical information to be added to Smart Care – Year End
- ROI/Chart Requests:
  - Programs to provide requested information if current (within SmartCare)
  - Historical information (CCBH) - Submit using the form on the Optum website
    - Note: Some reports and data available may have a different format than previously in CCBH
- ISL (Individual Service Level) – 2027
- SmartPortal – 2027



# Reports – Data Sciences

Derek Kemble

[BHS-DataScience.HHSA@sdcounty.ca.gov](mailto:BHS-DataScience.HHSA@sdcounty.ca.gov)

# Report Training and Resources



- Current Efforts
  - [Optum SmartCare Training](#)
  - [SmartCare Help Desk Support](#)
  - [SmartCare ARF: Treatment Programs](#)
  - Centralized E-mail support:  
[BHS-DataScience.HHSA@sdcounty.ca.gov](mailto:BHS-DataScience.HHSA@sdcounty.ca.gov)

# CoSC SmartCare Reports



Report Name
CoSD ASAM LOC Report
CoSD Bed Management Report
CoSD- CalOMS Error Report
CoSD CANS QSR Report
CoSD Client Ledger Report
CoSD Duplicate Clients Report
CoSD Merged Clients Report
CoSD Morning Admissions Report
CoSD Progress Note Timeliness Report
CoSD PSC QSR Report
CoSD TADT Report
CoSD Transition of Care Report
CoSD Treatment Team Report
CoSD-CalOMS & Programs Assignment Dates Mismatch Report

# CoSC SmartCare Reports

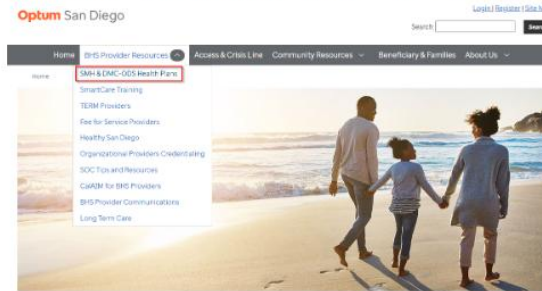


## CoSD SmartCare Reports Manual



The CoSD SmartCare Reports Manual has moved to the Optum website and can be accessed in one of the following ways:

1. [Click here](#) to navigate directly to the new CoSD SmartCare Report Tracker.
- 2a. Navigate to [optumsandiego.com](https://optumsandiego.com) and select SMH & DMC-ODS Health Plans.



- 2b. Scroll down and expand the Data and Reporting section, then select the CoSD SmartCare Report Tracker link.

Name	System Of Care	Link	Description	Revised Date	Superseded File
ASAM Reporting Tool	SUD	<a href="#">ASAM_Reporting_Tool.xlsx</a>	N/A	N/A	N/A
ASAM Reporting - Youth and Providers in SmartCare	SUD	<a href="#">ASAM_Reporting_-_Youth_and_Providers_in_SmartCare.pdf</a>	N/A	9/23/2024	ASAM_Process_for_Non_SmartCare_Users.pdf
CCRA to SC Preliminary Reports Crosswalk	MH	<a href="#">CCRA to SC Preliminary Report Crosswalk 2024-08-23.pdf</a>	N/A	8/23/2024	N/A
SmartCare to SC Preliminary Reports Crosswalk	SUD	<a href="#">SmartCare to SC Preliminary Report Crosswalk 2024-08-23.pdf</a>	N/A	8/23/2024	N/A
SmartCare Program Crosswalk	MH/SUD	<a href="#">SmartCare Program Crosswalk.xlsx</a>	N/A	N/A	N/A
CoSD SmartCare Report Tracker	N/A	<a href="#">CoSD SmartCare Report Tracker</a>	N/A	N/A	N/A
SmartCare Report Request Form for BH/SUD	N/A	<a href="#">SmartCare Report Request Form for BH/SUD.pdf</a>	N/A	N/A	N/A
SmartCare Report Request Form for Providers	N/A	<a href="#">SmartCare Report Request Form for Providers.docx</a>	N/A	N/A	N/A
SmartCare Report Request Process	N/A	<a href="#">BH/S SmartCare Report Request Process Flow.pdf</a>	N/A	N/A	N/A



# BHS Billing Announcements

Tess Bugay, Medical Claims Manager

Carmen Saline, Administrative Analyst III

MH Billing: [MHBillingUnit.HHSA@sdcounty.ca.gov](mailto:MHBillingUnit.HHSA@sdcounty.ca.gov)

SUD Billing: [ADSBillingUnit.HHSA@sdcounty.ca.gov](mailto:ADSBillingUnit.HHSA@sdcounty.ca.gov)

# Billing Unit Updates



- I. BHS BU is finalizing submission of Medi-Cal claims to DHCS for all June 2025 services.
  - Programs must make sure that Medi-Cal billable services are entered and in complete status by 06/25/2026.
  - Programs must review and fix all remaining 06/2025 service errors. The guide on [clearing CoSD service errors](#) is published on the Optum San Diego website's Workflows and Documentation of BHS Resources section. Please contact the appropriate team if you require further assistance.
  
- II. [9999 Tip Sheet](#). The review of 9999 on a bi-weekly basis (or as necessary) by programs allows for timely correction or billing of Medi-Cal billable services that are under '9999' status. Prioritize the services for 05/2025 in 9999 if Medi-Cal is billable.
  
- III. The monthly Up To The Minute (UTTM) bulletins for both [Mental Health](#) and [Substance Use Disorder](#) programs are available on the Optum San Diego website. Please review the previous and current Fiscal Year editions. The billing section of the UTTM contains BHS billing guides that cover Out-of-County, Other Health Coverage billing requirements, Client Insurance Plan requests, billing lockouts, service and charge error tips, and more.

# Billing Unit Updates



IV. The California Department of Health Case Services (DHCS) Specialty Mental Health (SMHS) Billing Manual and Drug Medi-Cal Organized Delivery System (DMC-ODS) Billing Manual version 4.0 (SFY 2026-2027) and List of Changes are available on the Optum SD website under the Billing tab.

- These documents offer the standardized rules, Medi-Cal requirements, Medicare and non-Medicare rules, and procedures needed for proper Medi-Cal claim submissions.

V. SMH and DMC-ODS Service Table.



## Q&A

For further questions: contact [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)

Or go online for more information at:

[OptumSanDiego.com](https://OptumSanDiego.com) → SMH&DMC-ODS Health Plans →  
SmartCare Tab

Next Meeting: Tuesday, July 21, 2026 10:00am -11:00am