

# SmartCare User Group

County of San Diego  
Behavioral Health Services

May 26, 2026



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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)



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# Clinical Updates

Jill Michalski, EHR Project Team, Clinical Lead

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

# Mode of Delivery (MOD) options



## 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

- Only selected if you are a provider in a program that is participating in one of the BH-Connect EBPs and/or
- You have been certified by the required Center of Excellence (COE) or certifying organization for the BH-Connect EBP
  - Example: PCIT International MOD should only be selected to claim the billing modifier for PCIT by providers who have been certified by PCIT International and are employed in a program that is working with the PCIT International COE.
  - BHC ACT/FACT Monthly Bundle

# Mode of Delivery (MOD)



Progress Note

Effective 05/13/2026 Status New Author Michalski, Jill

Service Note Billing Diagnosis Add-On Codes Warnings



**Service**

Status	Show	Start Date	05/13/2026
Program	[REDACTED]	Start Time	*
Procedure	Individual Therapy	Travel Time	* Minutes
Location	Office	Documentation Time	* Minutes
Clinician	Michalski, Jill	Service Time	* Minutes
Mode Of Delivery	[REDACTED]	Attending	
Cancel Reason	[REDACTED]	Referring	
Evidence Based Prac	Face-to-face	<input type="checkbox"/> Interpreter Services Needed	
Transportation Servic	PCIT International (Parent Child Interaction Therapy)		
	Telephone		
	Video Conference		
	Written		

Custom Fields

# Added Mode of Delivery to Services/Notes List Page



- A new column “Mode of Delivery” is available in the Services/Notes List Page
  - Allows users to store and view the MOD associated with each service or note entry.
  - Providers will need to select option to view the added MOD column by clicking on the Column Configurations Icon 
-  **Hot Tip:** *Once you have selected the configuration view with the MOD, create/save as a Favorite.*

[Services/Notes \(Client\) List Page - 2023 CaIMHSA](#)

# Mode of Delivery Column – Services/Notes List Page



Services/Notes (15)

Original  
TEST MOD COLUMN

All Clinician All Statusees All Procedures Other Apply Filter

The screenshot shows a web application interface for "Services/Notes (15)". At the top right, there is a toolbar with icons for search, favorites, download, print, settings, and a table view icon. A red arrow points to the table view icon, which has opened a dropdown menu with two options: "Original" and "TEST MOD COLUMN". Below the toolbar, there is a filter section with dropdown menus for "All Clinician", "All Statusees", "All Procedures", and "Other", followed by an "Apply Filter" button. The main content area below the filter is mostly obscured by a large, colorful abstract graphic in the bottom right corner of the slide.

# Mode of Delivery Column – Services/Notes List Page



Services/Notes (15)



All Clinician  All Statuses  All Procedures  Other

Show Services and Care Mgmt Claims  Past 12 Months  From 05/13/2025  To  All Programs

Include Services created from Claims  Only include Services with Add On Codes  All Program Assignment



Auth	DOS	Status	Document	Group Name	Procedure	Mode Of Delivery	Clinician	Program	Comment	Add On Codes	Attachment(s)	Recurrence
	05/05/2026 10:00	Show	<a href="#">Progress Note</a>		Individual Therapy 45.0...	Telephone	Michalski, Jill	TELECARE VIDA AC...				
	05/05/2026 09:00	Show	<a href="#">Progress Note</a>		Individual Therapy 45.0...	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	04/30/2026 09:00	Show	<a href="#">Progress Note</a>		Individual Therapy 45.0...	Face-to-face	Michalski, Jill	TELECARE VIDA AC...				
	04/16/2026 01:00	Show	<a href="#">Progress Note</a>		Assessment LPHA 50.00...	Face-to-face	Michalski, Jill	TELECARE REGION...				
	04/16/2026 09:00	Show	<a href="#">Progress Note</a>		Psychosocial Rehab - In...	Telephone	Michalski, Jill	RADY KIDSTART EP...				
	03/09/2026 09:00	Show	<a href="#">Progress Note</a>		Individual Therapy 50.0...	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	03/06/2026 12:00	Show	<a href="#">Progress Note</a>		Individual Therapy 50.0...	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	03/05/2026 09:00	Show	<a href="#">Progress Note</a>		TCM/ICC 25.00 Minutes	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	03/04/2026 11:00	Show	<a href="#">Progress Note</a>		TCM/ICC 20.00 Minutes	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	03/03/2026 10:00	Show	<a href="#">Progress Note</a>		Individual Therapy 50.0...	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	02/23/2026 09:00	Show	<a href="#">Progress Note</a>		Individual Therapy 50.0...	BHC - ACT/FACT Monthly ...	Michalski, Jill	TELECARE VIDA AC...				
	02/05/2026 07:30	Show	<a href="#">Progress Note</a>		Individual Therapy 45.0...	Face-to-face	Michalski, Jill	TELECARE VIDA AC...				
	01/13/2026 09:00	Show	<a href="#">Progress Note</a>	Test Group...	Group Therapy 45.00 Mi...	Face-to-face	Michalski, Jill	TELECARE VIDA AC...				
	01/08/2026 09:00	Show	<a href="#">Progress Note</a>		Brief Emotional/Behavio...	Face-to-face	Beck, James	TELECARE VIDA AC...				
	12/23/2025 09:00	Show	<a href="#">Progress Note</a>		Assessment LPHA 50.00...	Face-to-face	Michalski, Jill	TELECARE VIDA AC...				

# Chosen Name vs Legal Name Display



- New Configuration to configure the type of Client Name that displays across some screens
  - Can be configured to display either the client's Chosen Name or Legal Name
  - Configure to allow either Chosen Name or Legal Name to displays across the following screens:
    - Bed Census/Residential Board
    - Bedboard
    - Reception
    - My Calendar

# Chosen Name Vs Legal Name Team Scheduling Screen/Client Tab Header



- This configuration allows SmartCare to display the client's Chosen Name in place of their Legal Name on the Team Scheduling Screen and Client Tab Header
  - Displaying client's Chosen Name directly on SmartCare screens ensures all staff consistently address clients by their preferred name.
- @ icon will appear by Client Name for these use cases, hovering over the @ icon will display alternate name

# Chosen Name – Client Information Screen



- Chosen Name must be entered in Client Information (Client) Screen under the Alias Tab
  - Add First and Last Name under “Client Alias” section
  - Select type as “Alias”
  - Check the “Chosen Name” checkbox
  - Click “Insert”
  - Click “Save”

# Entering Chosen Name to be displayed



**Client Information**

General **Aliases** Demographics Financial Release of Information Log Contacts Family External Referral External Identifications

Custom Fields

**Client Alias**

First Name **1** Wilma Middle Name Last Name **2** Wobblestone

Type **3**   Allow Search **4**  Chosen Name

**List of Alias**

First	Alias	Last Name	Middle Name	Type	Allow Search	Chosen Name
	Alias					
	Preferred Name					

No data to display

- Inability to indicate if Client present in Service Details when documenting services.
  - This is a known issue and concern shared by SmartCare Counties
  - CM is working with Streamline on an enhancement to address the non-functioning “Client Present” checkbox
    - Timeline TBD for fix
  - Current options:
    - Document whether client present or service provided to a collateral contact in the narrative of service note
    - Utilize available caregiver codes when providing service to caregiver/family member.



# 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 be accepted through 5/30/26:
  - 1 ARF will be used for: SmartCare, Millennium, and SanWITS
  - ARF Location: Optum website under the Access tab
- Please ensure “rendering staff” is selected on the ARF for staff who do not need to login to avoid the account from being terminated due to inactivity
- Reminder: staff who do not login at least every 90 days will have their account terminated due to inactivity
- Accurate license, NPI, and taxonomy information is required for all clinical staff on the ARF
- Remaining access to CalMHSARx for LVNs was removed- LVNs should use the Home Medication Screen in SmartCare instead which was granted in February

# NEW CalOMS Reports



- **CoSD CalOMS 331/342 Error Report**

- Only acceptable value is “None or not applicable.”

<b>If the client’s treatment services are being delivered on behalf of another county, what is the code of the county for which the services are being performed?</b>	None or not applicable
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- **CoSD CalOMS and Program Assignment Dates Mismatch Report**

Status	Enrolled ▾	Discharged
<u>Discharged</u>	05/13/2026	05/18/2026

Document/Description ▲	Group Name	Effective
<u>CalOMS Admission</u>		05/14/2026
<u>CalOMS Standalone Update/Discharge</u>		05/18/2026

- **CoSD CalOMS Annual Update Due Date Report**

## CalOMS Cleanup Project

- Beginning mid-June
- 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



# 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



https://sdmhc.smartcarenet.com/SanDiegoSmartcareProd/ShowReport.aspx?ReportId=8IHGCjLoVPM%3D&ReportServerId=RUNPkrIID3Q%63

## CoSD SmartCare Reports Manual

### Latest Reporting Updates

This table displays the most recent update for the available reports.

Report Name	Update	Status	Last Updated
CoSD - CalOMS - Missing Signed Admission Report			
CoSD Active Clients Report	Removed deleted programs from Program parameter	Completed	1/28/2025
CoSD Admissions Morning Report	Removed deleted programs from Program parameter	Completed	1/28/2025
CoSD Admissions, Discharges, and Census Report	Improved report performance and fixed export format	Completed	2/4/2025
CoSD Authorizations Report	Initial deployment for general use	Completed	4/15/2025
CoSD Batch Upload Reference Guide			
CoSD Bed Management Report	Initial User Acceptance Testing	Started	5/15/2025
CoSD CalOMS Annual Update Due Date Report			
CoSD CalOMS Review Report	Initial User Acceptance Testing	Started	12/11/2024
CoSD CANS Assessment Summary	Initial User Acceptance Testing	Not Started	6/5/2025
CoSD Caseload Report	Initial User Acceptance Testing	Started	4/17/2025
CoSD CDAG Program Report	Initial deployment for general use	Completed	12/3/2024
CoSD CDAG Staff Report	Include staff that have no roles, programs, or CDAGs	In UAT	4/28/2025
CoSD Charges-Claims Report	Add Batch Id, Modified Date and Billed Date	In UAT	4/23/2025
CoSD Check History Report	Break out the billing address fields	Completed	12/30/2024
CoSD Client Demographic Report			
CoSD Client Insurance & Date	Initial deployment for general use	Completed	3/18/2025

# CoSD SmartCare Reports



## CoSD SmartCare Report Tracker

Report Status: All
Report: All

Report	Report Description	# of Requests	Last Revised	Report Status	Profile Link
CoSD CANS Assessment Summary	The CANS Assessment Summary is used to provide a client a high level overview of what their assessments mean. The PSC assessment is also displayed according to the corresponding assessment type.	1	10/14/2025	Done	<a href="#">🔗</a>
CoSD Program Invoicing Report	This report provides a comprehensive view of client service activities, encompassing details on service delivery, client demographics, program participation, and staff involvement over the specified date range. The primary goal of this summary is to offer an overview of service utilization, performance metrics, and program compliance for stakeholders.	2	9/25/2025	Revision Done	<a href="#">🔗</a>
CoSD Charges/Claims Report	The Charges/Claims report displays the information available in the Charges/Claims list page.	4	9/11/2025	Revision Done	<a href="#">🔗</a>
CoSD Client Roster Report	This report generates a list of all individuals who have been enrolled in selected programs during a specified timeframe. This report includes both active and discharged individuals, enrollment status, enrollment date, discharge date (if applicable).	1	9/2/2025	Done	<a href="#">🔗</a>
CoSD Active Clients Report	The CoSD Active Clients Report is designed to provide a comprehensive view of active clients enrolled in specific programs. It focuses on showing essential details about client participation, program assignments, and the status of services provided.	2	8/27/2025	Revision Done	<a href="#">🔗</a>
CoSD Caseload Report	The Caseload Report may be used to review staff caseloads and their respective clients. This report contains information from the Caseload (My Office) screen and offers the ability to view multiple staff caseloads at the same time.	1	8/26/2025	Done	<a href="#">🔗</a>
CoSD Client Demographic Breakdown	The Client Demographic Breakdown report provides a breakdown of the number of clients in a program. The report includes the clients' ages, gender, race/ethnicity and zip code.	2	8/26/2025	Revision Done	<a href="#">🔗</a>
CoSD Missing Diagnoses by Program	This report is used to track missing diagnosis forms and servicing missing diagnoses.	1	8/12/2025	Done	<a href="#">🔗</a>

0  
 New Requests in the Last 30 Days

2  
 Requests Closed in the last 30 Days

### Number of Reports by Status

Status	Count
In Testing	4
Done	11
Revision in Testing	2
Revision Done	10

### Requests Over Time

If you have any questions, please contact Data Science at [BHS-DataScience.HHS@sdcounty.ca.gov](mailto:BHS-DataScience.HHS@sdcounty.ca.gov) Data last refreshed: 10/17/2025

# CoSD SmartCare Reports



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## CoSD TADT Report

### Description

The Timely Access Data Tool (TADT) report is used to identify if programs are meeting the criteria for timely access standards. The report displays the programs affiliated to the user running the report and is split into 4 different categories, with each having their own standards for meeting timely access.

Report Status	First Published	Last Revised
Revision Done	02/19/2025	05/14/2025

### Report Filters

Filter	Description
Executed By Staff Id	This filter constrains the data to the user executing the report
Document Status	This filter excludes documents that are in the Error or Cancelled status
View As	This parameter is a single-select dropdown that allows a user to view the TADT information in detail or in summary
Program Code(s)	This parameter is a multi-select dropdown that allows a user to select one or more programs the user is associated to
Report Types	This parameter is a multi-select dropdown that allows a user to view one or more of the following report types: MHP Psychiatric, MHP Non-Psychiatric, DMC-ODS Outpatient, DMC-ODS Opioid
Access Met (Offered)	This parameter is a multi-select dropdown that allows a user to view one or more of the following access met related to offered appointments: (N/A), Met, Not Met
First Contact Date From	This parameter is a date search that allows a user to set the start date for the reporting period
First Contact Date To	This parameter is a date search that allows a user to set the end date for the reporting period
Has Medi-Cal	This parameter is a multi-select dropdown that allows a user to view clients with or without Medi-Cal
Document Status	This parameter is a multi-select dropdown that allows a user to view one or more of the following document statuses: Signed, In Progress, To Do
Referral Source	This parameter is a multi-select dropdown that allows a user to view one or more referral sources selected for timely access

### Columns

Detail



# 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)



- I. BHS BU is finalizing submission of Medi-Cal claims to DHCS for all May 2025 services.
  - Programs must make sure that Medi-Cal billable services are entered and in complete status by 05/27/2026.
  - Programs must review and fix all remaining 05/2025 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.



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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 → SMH&DMC-ODS Health Plans →  
SmartCare Tab

Next Meeting: Tuesday, June 23, 2026 10:00am -11:00am