



SmartCare User Group

County of San Diego

Health and Human Services Agency

Behavioral Health Services

January 29, 2025

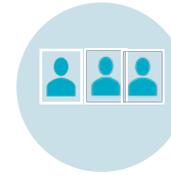
Meeting Goals



Transparency



Engagement



Inclusion



Preparation

Meeting Agenda



- Meeting Goals
- CalMHSA/SmartCare Recap
- Clinical Updates
- MIS
- Data Sciences
- Billing Unit
- Q&A



CalMHSA/SmartCare Recap



WHO

- We work with California Mental Health Services Authority (CalMHSA), who supports all counties across the public behavioral health system, and CalMHSA holds the contract with the SmartCare vendor, Streamline
- 25+ Counties partner with CalMHSA

WHAT

- Semi-statewide electronic health record where a customized solution has been built to meet the specific complex business needs of the California behavioral health system which functions as both a provider of the specialty clinical care and a managed care plan
- An EHR which can link and respect the complex needs of the behavioral health system, allowing for one system to treat the client as a whole

WHEN

- Phase 1 efforts between CalMHSA and the original 23 Counties coincided with the go-live of payment reform: July 1, 2023
- San Diego County go live was September 1, 2024.

- CSU billing workflow updated
- Group Therapy Error: “Unable to find matching rate”
 - Ensure correct procedure code is used for appropriate credential

Clinical Updates



Diagnosis Errors

- 2 Errors may show: Missing Diagnosis or Invalid ICD10
 - Largest number of errors when billing was turned on
 - Over 127,000 in total.
- Missing Dx
 - SUD seems to be most impacted by this error
 - Appears to be a migration issue, SUD please HOLD on updates Diagnosis,

Reminders

- Diagnosis documents are PROGRAM level data, not CLIENT level data
- When entering a prioritize, you must prioritize, or it will cause an error



SmartCare User Group: MIS

Rebecca Ferry-Rutkoff, Adrian Escamilla, Cheryl Lansang

Issue Reporting & Questions

Inquiry Routes for SmartCare issues and questions



Issue or Need	Resource
System issues: i.e. glitches, functionality issues, pop up errors	Follow the CalMHSA help desk communication process (see help desk flyer)
SmartCare ARF submission + any access related issues / questions	BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
Support questions that can't be addressed by the CalMHSA Help Desk	BHS_EHRSupport.HHSA@sdcounty.ca.gov
Documentation, guidelines or policy related questions	QIMatters.HHSA@sdcounty.ca.
Billing Issues or Questions that can't be addressed by the CalMHSA Help Desk	MHBillingUnit.HHSA@sdcounty.ca.gov ADSBillingUnit.HHSA@sdcounty.ca.gov MH Billing line: 619-338-2612 SUD Billing line: 619-338-2584
Escalation of CalMHSA help desk issues that have either been resolved prematurely or not resolved entirely	Route to MIS to provide to CalMHSA as an escalation point: BHS_EHRSupport.HHSA@sdcounty.ca.gov

Resources

Ongoing Support

- CalMHSA Knowledge Base is available at 2023.calmhsa.org
- Access help from within SmartCare
- Access San Diego specific resources via MHP Provider Documents and DMC-ODS pages of Optum website

SmartCare Resources



Numerous SmartCare resources are available to assist you with workflow and documentation questions:

1. Go to the CalMHSA Knowledge Base

Visit the links on the CalMHSA website at 2023.calmhsa.org to explore SmartCare EHR documentation and support tools organized by role:

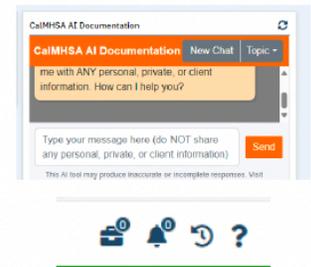
- Use the **search box** on the bottom of the navigation links to search the entire CalMHSA library, or
- Use **Ctrl + F** on your keyboard to search for key words within the **Documentation** sections.



2. Access help from within SmartCare

Once you are logged in to SmartCare, you can access help in the following ways:

- Use the CalMHSA **AI Documentation chatbot** to ask direct questions about workflow and documentation, or
- Click on the **black question mark** at the bottom of your screen to find "how to" documents on the CalMHSA website.



3. Access San Diego Specific Resources

For resources and guidance specific to San Diego County's use of SmartCare, go to either the [MHP Provider Documents](#) or [Drug Medi-Cal Organized Delivery System](#) pages of the **Optum website** and click on the **SmartCare** tab.



SmartCare Access & ARF Processing

MIS Updates and Information



- ARF Updates:
 - ETA Reduces to be 4-5 days
 - Continue to reallocate resources to improve timely response
 - Send completed ARF's to:
BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
- Ensuring completed ARF's will help avoid delays
 - There are several practices that can create delays in processing ARFs
 - Common errors on ARF Forms:
 - Incomplete forms or missing fields or user roles
 - Handwritten forms
 - Full program name
 - Incorrect taxonomy number

Support Ticket Updates

MIS Updates and Information

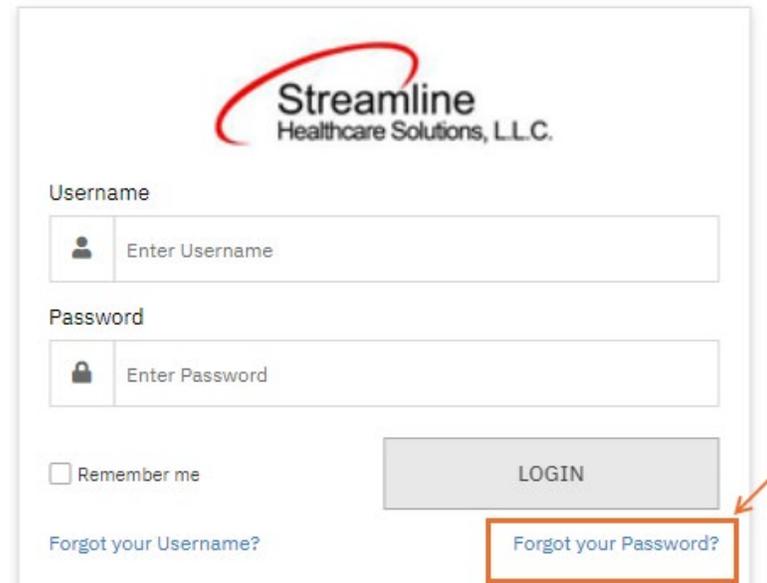


- There are several practices that can create delays resolving a support request/email or ticket
 - Copying (CC'ing) MIS when opening a ticket with CaMHSA
 - Forwarding emails immediately upon sending to CaMHSA
- BHS is working with CaMHSA to improve the help desk experience.

Support Ticket Updates MIS Updates and Information



- Common Issues Reported:
 - Access lock out
 - Please use the self-service password reset feature



The screenshot shows the login interface for Streamline Healthcare Solutions, L.L.C. It features the company logo at the top, followed by a "Username" field with a person icon and the placeholder text "Enter Username". Below that is a "Password" field with a lock icon and the placeholder text "Enter Password". There is a "Remember me" checkbox and a "LOGIN" button. At the bottom, there are two links: "Forgot your Username?" and "Forgot your Password?". The "Forgot your Password?" link is highlighted with an orange rectangular box, and an orange arrow points to it from the right.



Process for Escalating Tickets

MIS Updates and Information



- Criteria for escalation of a ticket:
 - You have received a response from CalMHSA that a ticket is resolved that has not actually been resolved
 - You submitted a ticket and have not received a response after one week
- Process for escalation of a ticket that meets this criteria:
 - Forward the email that includes the ticket number to MIS Support
 - Indicate in the forwarded email which of the criteria above has been met

State Reporting

MIS Updates and Information



- Successfully submitted monthly
 - DATAR
 - ASAM
- BHS is working with CalMHSA to resolve current issues for State Reporting in 2 areas:
 - CalOMS
 - Manual submission planned this month
 - 274/NACT
 - Optum is assisting





LIVE WELL
SAN DIEGO

Reporting in the SmartCare Era

Derek Kemble – Data Sciences

Primary Reporting Teams



- Management Information Systems (MIS)
 - SmartCare canned reports, and data integrity.
- Data Science (DS)
 - Dashboards created from extracts outside of EHR capabilities.
- Optum
 - Authorization, MCP, fiscal, State, and technically advanced reporting.
- UCSD (HSRC/CASRC)
 - Clinical deep dives, client outcomes, and add systems (e.g.- mHOMS).

Reporting Redevelopment



- Redevelopment Efforts
 - Scope
 - Prioritization
 - Gap Analysis
 - Tracking
- Report Centralization Efforts
 - Current Process
 - Data Centralization
 - Training and Resources



Report Training and Resources



- Current Efforts
 - [Optum SmartCare Training](#)
 - [SmartCare Help Desk Support](#)
 - [SmartCare ARF: Treatment Programs](#)
 - E-mail support:
BHS_EHRSupport.HHSA@sdcounty.ca.gov
- Future Efforts
 - SmartCare Reports Manual
 - Centralized Report Requests
 - Additional Trainings



CoSD SmartCare Reports



Report	Status	Notes
Active Clients Report	Completed	
ADC Report	UAT	
Admissions Morning Report	Completed	
Caseload Report	In Progress	
Charges/Claims Report	Not Started	
Client Demographic Data	Not Started	
Client Services Report	Completed	Upcoming enhancement
Progress Note Timeliness Report	UAT	
Service Error Report	Completed	
TADT Report	UAT	
Unsigned Documents Report	Not Started	



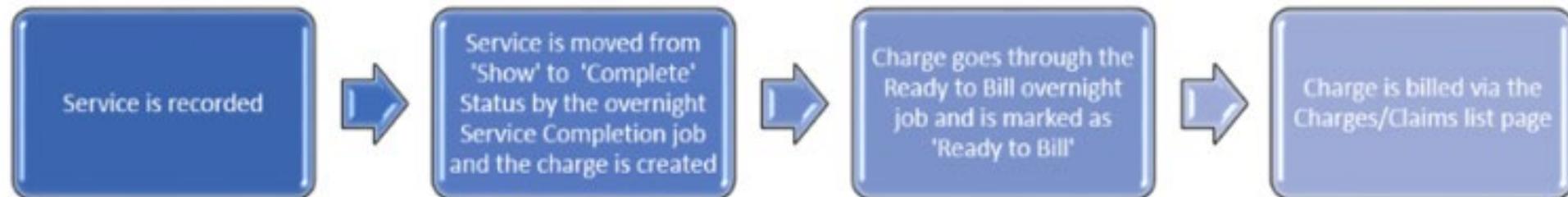
Billing Workflow in SmartCare

Tess Bugay and Carmen Saline

Billing Workflow in SmartCare



- Overview of the Service Completion, Charge Creation and Ready to Bill Processes in SmartCare



Billing Workflow in SmartCare



- Service is recorded
 - Scheduled service(s) is/are changed to SHOW status (by programs) after service(s) is/are rendered to the client.
 - Create Bed Services – when using the automatic census in the inpatient/residential module.
- Service is moved from SHOW to COMPLETE status by the overnight billing job and charge is created. Services with validation errors (see examples below) will remain in SHOW status until error has been resolved.
 - No billing diagnosis associated with the client
 - Financial Information has not been completed for client – no active coverage in legacy systems; no recorded Medi-Cal eligibility
 - Authorization is required – request should be submitted to Optum prior to rendering the service.

Billing Workflow in SmartCare



- Set Charge Ready to Bill - Services in COMPLETE status with charge(s) created goes through different set of billing rules before they are marked Ready to Bill. Charge Creation Errors are assigned to services that failed ready to bill validation rules.
 - Client Address or its Components are Missing – client address is incorrect format or not filled in; client address is required when generating electronic claims.
 - Missing Billing Code. Please check procedure rates/billing codes.
 - Clinician is not authorized to provide services to specified coverage plan.
- Charge creation errors are reviewed and resolved.
- Charges ready to bill are batched and reviewed for accuracy.
- Electronic claims generated and submitted to DHCS by BHS BU.



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Q&A

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

Or go online for more information at: Optumsandiego.com

NEXT MEETING: February 20, 2025