# SmartCare User Group

County of San Diego

Health and Human Services Agency

Behavioral Health Services

February 27, 2025

# Meeting Goals

Transparency          Engagement          Inclusion

# Meeting Agenda

- Meeting Goals

- Clinical Updates

- MIS

- Data Sciences

- Billing Unit

- Q&A

# Clinical Updates

## CalMHSA Rx

- Current Access for Prescribers & RNs

- Escalated need for LVNs, LPHAs, etc to have visible access and capabilities to add "home medication"

- CalMHSA introduced an enhancement of CalMHSA Rx

  - Medications & allergies to flow from CalMHSA Rx into SmartCare

- Next steps: CalMHSA RX user increase: 2 step process for CalMHSA build

  - Those who had a location with a prescriber already in SmartCare

  - Those who needed a location built in SmartCare

# Clinical Updates

Diagnosis Errors

- 2 Errors may show: Missing Diagnosis or Invalid ICD10

  - Still largest number of errors: approx. 100,000

  - SUD seems to be most impacted by this error

  - Updated comm was released 1/31: ALL providers must review dx and update accordingly

Batch Uploading

- Internal testing has been done – ticket was escalated due to results. GOOD NEWS!

eMAR

- Met with CalMHSA mid February for initial review and discussions

- Future meetings are being set up and we will begin calling for those interested in the next month

# Clinical Updates

## "PENDING" Status

- Allow for a service to be "held"
    - Won't move to "complete"
    - Allows for Supervisors & staff to edit/change note prior to overnight job running
    - Allows for editing of entirety of note, including service details
    - MUST change to "show" when complete

## Overnight Job delay

- Allows for the automatic pull of services from "show" to "complete" status to be delayed by a set amount of days
- Timeframe is based off of date of service

# Clinical Updates



Updates to Optum site

- New option in drop down

  - SMH&DMC-ODS Health Plans

    - SmartCare Tab

      - Resources at top

      - Different subjects to choose from

# 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<br>ADSBillingUnit.HHSA@sdcounty.ca.gov<br>MH Billing line: 619-338-2612<br>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:<br>BHS_EHRSupport.HHSA@sdcounty.ca.gov |

# Resources
## Ongoing Support

- CalMHSA Knowledge Base is available at https://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.
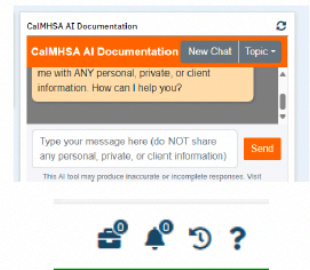
3. **Access San Diego Specific Resources**

   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**.

**Updated September 6, 2024**

- CalMHSA is transitioning to a new support platform – HubSpot
  - Beginning March 1st:
    - More efficient ticket routing
    - Higher service level
    - Users will have access to tickets submitted

  - Live Chat: at 2023.calmhsa.org chat bubble for immediate assistance
  - NEW Support Ticket: at 2023.calmhsa.org/support complete a support form
  - NEW Customer Ticket Portal: Register for a Customer Ticket Portal Account at https://ehr-support.calmhsa.org/tickets-view
  - Connected directly with a member of the CalMHSA Support Team.

# Support Ticket Updates
## MIS Updates and Information

- BHS is working with CalMHSA to improve the Help Desk experience.

- There are several practices that can create delays resolving a support request/email or ticket
  - Copying (CC'ing) MIS when opening a ticket with CalMHSA
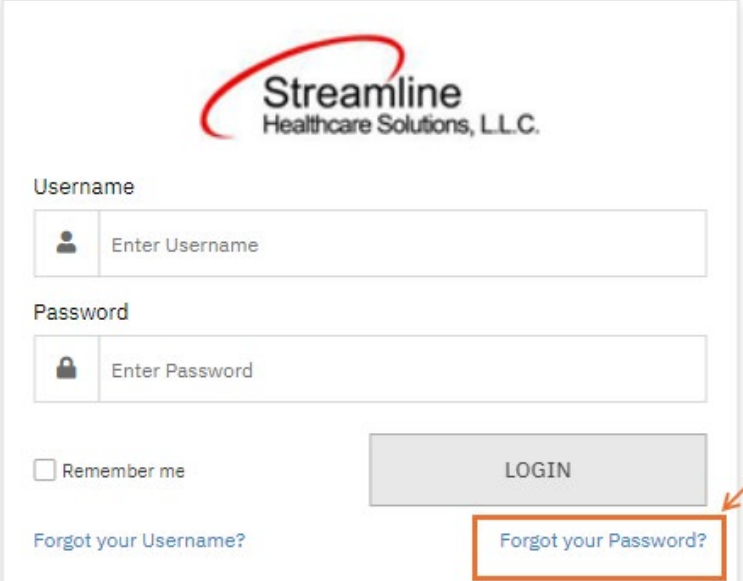  - Forwarding emails immediately upon sending to CalMHSA

- 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

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

- ## ARF Updates:
  - ETA significantly reduced, goal is 4-5 days
  - Continue to prioritize & reallocate resources

- ## Ensuring correct ARF completion will help avoid delays
  - Common errors:
    - Incomplete forms,  missing fields, missing user roles
    - Handwritten forms
    - Full program name
    - Incorrect taxonomy number
    - Incorrect or old form

- ## Send completed ARF's to: BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov

# State Reporting
## MIS Updates and Information

- Successful submissions monthly
  - DATAR
  - ASAM

- BHS is working with CalMHSA to resolve current priority issues for State Reporting requiring manual submission:
  - CalOMS
  - 274/NACT

# Priority Issues
## MIS Updates and Information

- Privacy and compliance concerns

- Billing Errors

- Home Med Entry & Viewing Medication History

- State Reporting

- Role/Access clean-up/optimization

# Reporting in the SmartCare Era

Derek Kemble – Data Sciences

# Report Training and Resources

- Current Efforts
  - <u>Optum SmartCare Training</u>
  - <u>SmartCare Help Desk Support</u>
  - <u>SmartCare ARF: Treatment Programs</u>
  - Centralized E-mail support:                    <u>BHS-DataScience.HHSA@sdcounty.ca.gov</u>

- Future Efforts
  - SmartCare Reports Manual
  - SmartCare Report Development Tracker
  - Additional Trainings

# CoSD SmartCare Reports

| Report | Status | Notes |
|---|---|---|
| Active Clients Report | Completed | |
| ADC Report | Completed | Unique Clients Served: 9/1 forward |
| Admissions Morning Report | Completed | |
| Caseload Report | Hold | Working with Streamline |
| Charges/Claims Report | Completed | |
| Client Demographic Data | UAT | |
| Client Services Report | Completed | Enhancement in validation |
| Progress Note Timeliness Report | Completed | |
| Service Error Report | Completed | |
| TADT Report | Completed | Able to view TADT summary or detail |
| Unsigned Documents Report | UAT | |
| Aftercare Discharge Summary Report | Not Started | |
| Authorization Report | Not Started | |
| Client Insurance & Date Span Report | In Progress | |
| Open Enrollments and Last Service Date Report | UAT | |

# Data Elements Required for Billing

Tess Bugay and Carmen Saline

02/27/2025

# Financial Information/Coverage

## Service Error Report From 02/01/2025 Through 02/20/2025

**Error Message (13)- Financial information has not been completed for this client.**

| Program | Service ID | Client ID | Date of Service | Units | Procedure | Status | Staff ID | Staff Name | Location |
|---------|-----------|-----------|-----------------|-------|-----------|--------|----------|-----------|----------|
| | 1453519 | | 02-03-2025 | 57 | Psychosocial Rehabilitation | Show | 1024251 | | Office |
| | 1471575 | | 02-04-2025 | 65 | Psychosocial Rehabilitation Group | Show | 1026020 | | Office |
| | 1471578 | | 02-04-2025 | 65 | Psychosocial Rehabilitation Group | Show | 1026020 | | Office |
| | 1465770 | | 02-05-2025 | 70 | Psychotherapy with Patient | Show | 1021226 | | Office |

# Financial Information/Coverage

| Date From | 9/1/2024 | | | Date To | 2/20/2025 | | |
| Client ID | 2 | 8 | ☐ NULL | Client Status | All Clients ▾ | | |
| Insurance Plan | AARP Medicare Supplement Plans, A ▾ | | | Insurance Plan Status | All Statuses ▾ | | |

|◄ ◄ [1] of 1 ► ►|  ⇦ _____ Find | Next  🖫▾ ↻ 🖨

## Client Insurance & Date Span Report

| Client ID | Client Last Name | Client First Name | Client DOB | Client SSN | Last DOS | Clinician | Program | Insurance Plan | Insurance Plan Status | Plan COB Order | Insurance Start Date | Insurance End Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|

Printed On 2/20/2025     **NO COVERAGE LISTED ON THE REPORT**                                    Page1 of 1

### Client Information

ⓘ

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

**Financial Summary**

| Balance | Current | 30 Days | 90 Days | 180+ | Total | Financially Responsible ··Client or Other |
|---|---|---|---|---|---|---|
| Coverage | | | | | | |
| Client | | | | | | |

Client Last Payment Made  _____  On  _____

**List of Coverages**   **NO COVERAGE LISTED ON FINANCIAL TAB OF CLIENT INFORMATION SCREEN**

| # | Start Date | End Date | Coverage | Insured Id | Group # | Auth | Phone |
|---|---|---|---|---|---|---|---|

No data to display

Complete Client Plan Request form and MHBillingUnit or SUDBillingUnit email address or eFax the form.

If client has Medi-Cal, please include CIN# and Effective Date on the request.

If client has Private Insurance or Medicare, please include Insured ID and Effective Date

If client does not have any type of coverage or unable to collect vital info to verify eligibility, please indicate on the request form.

Please provide justification when choosing County Billable SUD or County (MC) MH Administration plan.

# Authorizations

**Authorization is required for the following procedure codes:**
- Adult Residential Day
- Adult Residential Day – Older Adult
- Crisis Residential Day
- Crisis Residential Day – Older Adult
- Day Rehabilitation – Full Day
- Day Rehabilitation – Half Day
- Day Treatment Intensive – Full Day
- Day Treatment Intensive – Half Day
- Therapeutic Foster Care
- Residential Treatment – Substance Use

**IMPORTANT:** Before contacting Optum regarding "Required authorization for the same program missing for Medi-Cal CIN#999999999" service error, please verify if authorization was submitted, date it was submitted, client, program and procedure.

# Client Home/Billing Address

**When adding/updating client address please remember to:**

- Check Financially Responsible = Client
- There is a Home address and Billing Box is checked √
- Click on Details and verify that client address is in correct format

# Q&A

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

Or go online for more information at: Optumsandiego.com

**NEXT MEETING: March 26, 2025 9:00-10:00am**