

SmartCare User Group

County of San Diego
Health & Human Services Agency
Behavioral Health Services
December 16, 2025



Meeting Goals



Transparency



Engagement



Inclusion

Meeting Agenda



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





SmartCare User Group: Clinical Updates

Heather Rey
Jill Michalski

Caregiver (Collateral) Services Procedure Code Update



The Caregiver (Collateral) Services Procedures Codes have been tested and confirmed as active in the SmartCare PROD environment.

Reminders:

- these procedures codes are for use when providing a service involving a significant support person for the purpose of addressing the behavioral health needs of the beneficiary to assist them in achieving treatment goals.
- Providers should select the **required** COLL Mode of Delivery that most accurately describes the focus of the provided service or intervention being claimed.
- Please review the BHS Info Notice (11.14.2025) for further guidance for use of these procedure codes and modifiers.

Client Flags & Special Populations



Reminder: Client Flags and Special Populations allow programs to apply tracking protocols identify and track specific client populations, special programs/services, safety risks, and assessment timelines, etc.

Programs are encouraged to review any current/active flags or special populations when enrolling new clients and to include addition of applicable flags or special populations as part of their intake and assessment workflows.

Programs should not end client flags or special populations that were created or added by another program (for clients open to more than one program) without first consulting and collaborating with the other program.

Client Flags & Special Populations



Client Flags:



SmartCare | CalMHSA SmartCare Sandbox | 04-20-2023 | Smith, John (1) | Charla Rowe

Client Dashboard

Summary

Name: Smith, John

Home Phone: (555) 555-5555

Emergency Contact: Test, John (626) 555-5555

Current Balance: \$0.00

Treatment Team

Role
Inpatient Therapist*
Program Assignment Staff: MH Adult Outpatient*
Program Assignment Staff: Mobile Crisis*
Inpatient Attending*
Program Assignment Staff: CSU Program*
Program Assignment Staff: SUD Youth Outpatient*

Flag Alert

Flags	Start Date	End Date	Flag Type	Notes
🔴	06/30/2023	No End Date	Vitals Flowsheet	Vitals Flowsheet
🔴	06/30/2023	No End Date	Vitals Flowsheet	Vitals Flowsheet
🔴	01/11/2024	No End Date	Vitals Flowsheet	Vitals Flowsheet
🔴	07/01/2024	No End Date	Nursing Assessment	Nursing Assessment
🔴	07/01/2024	No End Date	Discharge Summary	Discharge Summary

OK

Client Tracking

Status	Date
In Progress	
In Progress	
In Progress	

Program Coordinator: *****

Program Assignment Staff: MH Adult Outpatient*

Program Assignment Staff: CSU Program*

Program Assignment Staff: SUD Youth Outpatient*

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Client Flags



- [How do I create a flag to alert treatment team members to important client information? - 2023 CalMHSA](#)
- [Client Flags and Tracking Protocol Overview - 2023 CalMHSA](#)
- [Client Flags \(Client\) List Page - 2023 CalMHSA](#)

Client Flags



Flag Types (88)

<div> <div>Active Only</div> <div>All Flag Types</div> <div>All Permission statuses</div> <div>All Pop up statuses</div> <div>All Display Statuses</div> </div>					
	Flag Id	Flag Type	△	Display	Pop Up
	46451	AIMS		Yes	Never
	46421	ASAM		Yes	Never
	46423	CAFAS Needed		Yes	Never
	46443	Cal-OMS Admission		Yes	Never
	10593	CalAIM Assessment Needed		Yes	Never
	46445	CANS due for this client		Yes	Never
	1000002	CARE Act		Yes	Always
	24521	Child turns 18 on		Yes	Never
	46881	Children Birthed Outcome Data		Yes	
	46425	Client also has private insurance		Yes	Never
	24607	Client Annual Paperwork		Yes	Never
	46877	Client Authorization Changed		Yes	Never
	46876	Client Diagnosis Update		Yes	Always
	11055	Client documents missing signature		Yes	Never
	11072	Client Does Not Have Parental Consent		Yes	Never
	46865	Client does not speak english		Yes	Always
	46424	Client has a deductible		Yes	Never
	10622	Client has Advanced Directive		Yes	Never
	11113	Client Hospitalization		Yes	Never
	10435	Client Information		Yes	Never
	24509	Client is on Injectable		Yes	Never
	24510	Client must contact billing office		Yes	Never
	46433	Client Payment Plan		Yes	Never
	46863	Client Plan Coverage Information		Yes	Never
	46449	Client receiving wrap-around services		Yes	Never
	46434	Client Under 18		Yes	Never
	45314	Client Under 18 and No Financial Responsibility Assigned		Yes	Never
	4183	Closing Letter Sent		Yes	Never
	46455	Collect Copay		Yes	Never
	46426	Collect Money At Time Of Service		Yes	Never
	46435	Conflict of Interest		Yes	Never
	46437	Court Order		Yes	Never

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Client Flags



Flag Types (88)

Active Only	All Flag Types	All Permission statuses	All Pop up statuses	All Display Statuses	Apply Filter
	Flag Id	Flag Type	Display	Pop Up	Permissioned
	46436	CSI Standalone Collection	Yes	Never	No
	45313	Deceased	Yes	Never	No
	10648	Do Not Call	Yes	Always	No
	4182	Do Not Reschedule	Yes	Never	No
	40174	Duplicate Insurance Plan	Yes	Never	No
	46879	Exception Document Due Expiration	Yes		No
	11112	Expired Consent	Yes	Always	No
	4181	Finance	Yes	Never	No
	4186	First Time Client	Yes	Never	No
	46873	Full Service Partnership	Yes	Never	No
	46457	Guardian	Yes	Never	No
	46441	High Risk Client	Yes	Never	No
	46886	Hospice Care	Yes	Never	No
	11060	In Progress	Yes	Never	No
	46870	Internal Consent Management	Yes	Never	No
	46874	Lab Due	Yes	Never	No
	11061	Legal	Yes	Never	No
	46882	MAT Hold	Yes		No
	46893	MAT Pre-pour	Yes		No
	46442	Med Chart	Yes	Never	No
	46460	Minor Consent Client	Yes	Never	No
	45316	New Appointment After Assessment	Yes	Always	No
	46889	NOMs Baseline Due	Yes	Always	No
	46891	NOMs Discharge Due	Yes	Always	No
	46890	NOMs Reassessment Due	Yes	Always	No
	46888	NOMs Reporting - 10% Random Select	Yes	Never	No
	25664	On Sample Medications	Yes	Never	No
	46887	Palliative Care	Yes	Never	No
	1000003	PC Conservatorship Investigations	Yes	Always	No
	1000004	PC PCON - LPS PC Appointed	Yes	Always	No
	1000005	PC PCON - Murphy PC Appointed	Yes	Always	No
	1000006	PC PCON - Private Conservator Appointed	Yes	Always	No

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Client Flags



	1000007	PC Temporary Conservatorship	Yes	Always	No
	10595	Periodic Review Needed	Yes	Never	No
	46880	Phase of Care	Yes		No
	11076	Physical Exam Needed	Yes	Never	No
	46878	Pregnancy Indicator	Yes	Always	No
	46463	Primary program enrollment needed	Yes	Never	No
	46875	Private Pay/No Coverage Plans	Yes	Never	No
	24522	PSC-35 needed	Yes	Never	No
	46429	Release Due or Overdue	Yes	Never	No
	46430	Reminder Call	Yes	Never	No
	37438	Review Client Demographics	Yes	Never	No
	1000000	Safety Plan Review	Yes	Never	No
	24513	Safety Risk	Yes	Always	No
	46447	Staff Safety Concern	Yes	Always	No
	46465	Supports Coordination	Yes	Never	No
	46466	Targeted Case Management	Yes	Never	No
	46894	Toxicology Screen	Yes		No
	20261	Update Problem List	Yes	Never	No
	46892	Use Keyphrase "Open Payment Database"	Yes	Always	No
	4184	Verify Coverage	Yes	Never	No
	11059	Verify Guardian	Yes	Never	No

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Client Flags



- Client Flag Details Screen (Client)
 - This screen displays client flags for selected client
 - Create or modify flags from this screen
- Client Flags (My Office)
 - This screen displays all clients that have been “flagged” and can be filtered by flag type, program, status and by open date.
- Client flags can be entered at time of enrollment or anytime during treatment episode
- Client Flags can also be used to create tracking protocols to assign due dates to ensure timelines for assessments, outcome measures, or other updates.
 - Tracking Protocol Details Screen

Client Flag Details (Client)



11-21-2025

Client Flag Details

Note Information

Type ID Work Group ☒ Active

Level Protocol Protocol Flag ID Program

Note ☐ This flag recurs

Open Date Display Date Due Date End/Completed Date

Completed By

Link to

☐ Nothing

☐ Document [Open](#) Assigned Users Assigned Roles

No data to display No data to display

Comment

☐ Permitted Flag ☐ Do not display flag ☐ Never Pop Up ☐ Always Pop Up

Note List ☒ Show Active Only

	Note Type	Work Group	Level	Note	Display	End	Created By	Created On	Provider
X	<input type="radio"/> Safety Risk		Information	History of SI - high ...	12/16/2025		jmichals	12/16/2025	

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Client Flags (Client)



21-2025

Jill Michalski

Client Flags (1)

Active Only

All Work Groups

All Flag Types

Effective As Of 12/16/2025

Apply Filter

Flag Type		Work Group	Level	Note	Start	End	Created By	Created On
Safety Risk			Information	History of SI - high utilizer of Crisis S...	12/16/2025		jmichals	12/16/2025 10:18 AM

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Special Populations



- Special Populations allow for tracking data points that may not be able to be captured elsewhere in SmartCare
 - Examples: ICC/IHBS, AB 352, Probation, Therapeutic Foster Care, AB1051, LPS Conservatorship, Child Welfare, etc
 - Intended for data tracking purposes rather than clinical information
 - Can be added at time of enrollment or at any time during treatment episode
- Special Populations Details Page
 - [How To Identify a Client as Katie-A or Other Special Population - 2023 CalMHSA](#)

A screenshot of the SmartCare application interface showing the "Special Populations Detail" page. The page has a sidebar with navigation icons (CA, CT, CF) and a main content area. The main area contains a form with the following fields: "Special Population Type" (set to "Katie A - ICC/IHBS"), "Start Date" (set to "02/07/2023"), and "End Date" (empty). Below these is a "Comments" section with the text "Determine the client meets criteria for Katie-A". There are three orange callout boxes with numbers: "5" points to the "Special Population Type" dropdown, "6" points to the "Comments" text area, and "7" points to the "Save" button in the top right corner of the form.

Special Populations



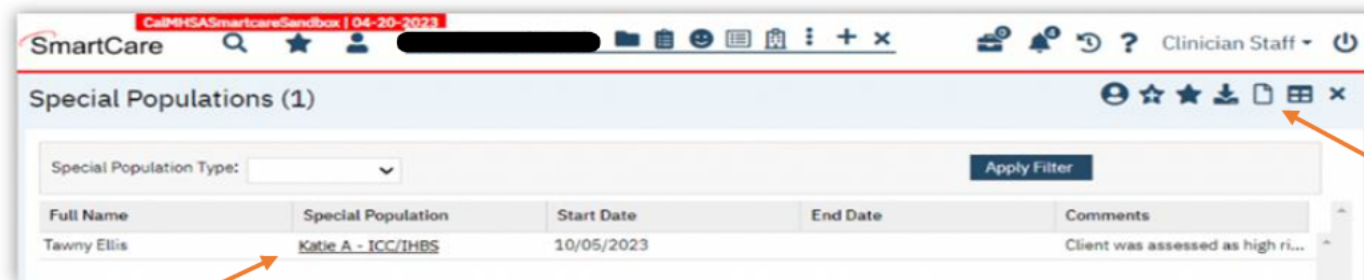
- AB 1051
- AB 109
- AB 352 - Abortion
- AB 352 - Contraception
- AB 352 - Gender Affirming Care
- CalWORKS
- Child Protective Services
- Children Crisis Continuum Pilot Program (CCCPP)
- Foster Care
- ICC/IHBS
- Katie A - ICC/IHBS
- LPS Conservatorship
- Other Conservatorship
- Out of County Medi-Cal
- Presumptive Transfer
- Probation
- Prop 36 (2024)
- Therapeutic Foster Care (TFC)

Special Populations



- Special Populations (Client)

- Shows all special population entries that have occurred for this client with start/end dates
- Can be filtered by type of special population
- Can create new entry by selecting New icon which will take you to the detail page to create entry.
- Can modify existing Special Population entry by clicking on link in Special Population column
- [How To Identify a Client as Katie-A or Other Special Population - 2023 CalMHSA](#)



The screenshot shows the "Special Populations (1)" section in the SmartCare system. At the top, there is a "Special Population Type:" dropdown menu and an "Apply Filter" button. Below this is a table with the following columns: Full Name, Special Population, Start Date, End Date, and Comments. The table contains one entry for Tawny Ellis, with the Special Population listed as "Katie A - ICC/THBS" and the Start Date as "10/05/2023". The Comments column shows "Client was assessed as high ri...". An orange arrow points to the "Katie A - ICC/THBS" link in the Special Population column, and another orange arrow points to the "New" icon (a plus sign in a square) in the top right corner of the table area.

Full Name	Special Population	Start Date	End Date	Comments
Tawny Ellis	Katie A - ICC/THBS	10/05/2023		Client was assessed as high ri...

Special Populations



- Client With Special Populations (My Office)
 - Includes all clients across the system
 - Available to supervisors who manage programs
 - List page will show all special populations that have occurred in the system
 - Filter by Special Population Type or date range (active during date range)
 - [How to View All Clients with a Special Population - 2023 CalMHSA](#)

Clients with Special Populations (3)

Special Population Type: Start Date: End Date:

Full Name	Special Population	Start Date	End Date	Comments
[REDACTED]	CalWORKS	01/08/2024		
[REDACTED]	Probation	01/01/2024		
[REDACTED]	Katie A - ICC/IHBS	10/05/2023		Client was assessed as high ri...

Issue: Pop Up Ads – DrFirst



Informational Pop-ups reported by prescribers when entering prescriptions

- This was noted to be an integrated function configured within DrFirst, not in SmartCare
 - Integrated messaging and educational resource notifications, coupons for medications, client educational resources
- Decision by CalMHSA to disable this function systemwide
- Once fully implemented, prescribers should no longer see these types of sponsored prompts



SmartCare User Group: MIS

Rebecca Ferry-Rutkoff, Adrian Escamilla

Project Updates



- CCBH legacy system is being retired as it is no longer supported as of 12/31/25
- All historical client info from CCBH will be stored in a new CalMHSA managed Data Archive
- Reminder: Some client data was migrated from CCBH and SanWITS to SmartCare and remains available
 - All client demographic data
 - Most clinical documentation back to 2022
 - Continuity of Care Doc
 - Progress Note (PN) – most recent
 - Assessment (BHA) – Most Recent
- The “snapshot” of CCBH was taken on December 1; any changes to CCBH after December 1 will not be recorded in the new data archive.
- A new ROI process will be communicated when finalized by the new year
- Access to historical and other source data (provider systems) is part of our future roadmap and planning, including access through the HIE and CalMHSA Connex

Staff Administration



- A revised Access Request Form will be posted in January, removing the CCBH access option
- No new CCBH access will be provided beginning January 1
- SmartCare audit process updates are coming soon; updates will include COR and provider participation- details will be announced once finalized



Reporting in the SmartCare Era

Derek Kemble – Data Science

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
- Future Efforts
 - "How to" for manual reports.
 - Data Science- Data Quality team efforts
 - Improved Email Process



CoSD SmartCare Reports



SmartCare Report Request Form

Data and Reporting

Name	System Of Care	Link	Description	Revised Date	Superseded File
ASAM Reporting Tool	SUD	ASAM_Reporting_Tool.xlsx	N/A	N/A	N/A
ASAM Reporting - Youth and Providers not in SmartCare	SUD	ASAM_Reporting_-Youth_and_Providers_not_in_SmartCare.pdf	N/A	9/27/2024	ASAM_Process_for_Non_SmartCare_Users.pdf
CCBH to SC Preliminary Reports Crosswalk	MH	CCBH to SC Preliminary Report Crosswalk 2024-08-23.pdf	N/A	8/23/2024	N/A
SanWITS to SC Preliminary Reports Crosswalk	SUD	SanWITS to SC Preliminary Report Crosswalk 2024-08-23.pdf	N/A	8/23/2024	N/A
SmartCare Program Crosswalk	MH/SUD	SmartCare Program Crosswalk.xlsx	N/A	N/A	N/A
CoSD SmartCare Report Tracker	N/A	CoSD SmartCare Report Tracker	N/A	N/A	N/A
SmartCare Report Request Form for BHS staff	N/A	SmartCare Report Request Form for BHS staff.docx	N/A	N/A	N/A
SmartCare Report Request Form for Providers	N/A	SmartCare Report Request Form for Providers.docx	N/A	N/A	N/A

CoSD SmartCare Reports



CoSD SmartCare Report Tracker

CoSD SmartCare Report Tracker



Report Status

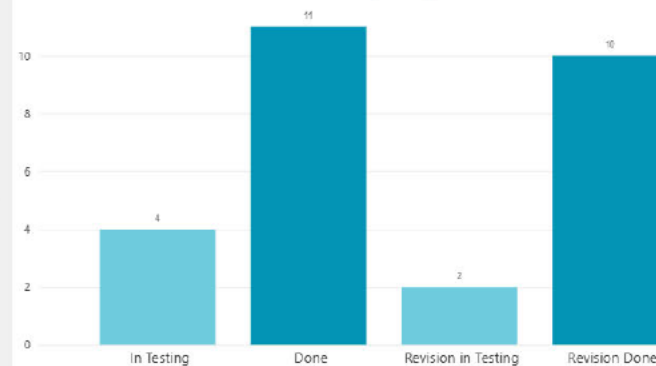
All

Report

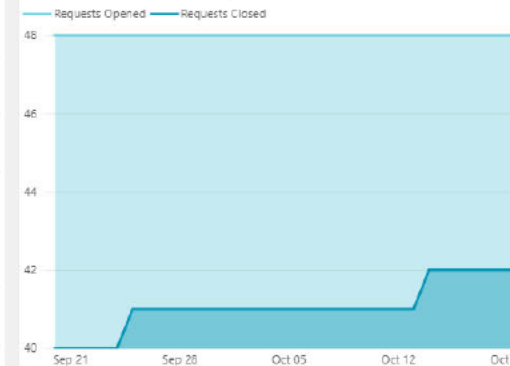
All

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	Profile Link
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	Profile Link
CoSD Charges/Claims Report	The Charges/Claims report displays the information available in the Charges/Claims list page.	4	9/11/2025	Revision Done	Profile Link
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	Profile Link
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	Profile Link
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	Profile Link
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	Profile Link
CoSD Missing Diagnoses by Program	This report is used to track missing diagnosis forms and servicing missing diagnoses.	1	8/12/2025	Done	Profile Link

Number of Reports by Status



Requests Over Time



0

New Requests in the Last 30 Days

2

Requests Closed in the Last 30 Days

If you have any questions, please contact Data Science at BHS-DataScience.HHSA@sdcounty.ca.gov

Data last refreshed: 10/17/2025

CoSD SmartCare Reports



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/Reminders

Tess Bugay and Carmen Saline

Billing Timely Filing



1. Services rendered in 12/2024 will need to be submitted to DHCS on/before 12/29/2025.
2. Please ensure that you enter all your 12/2024 services or move them to show status (if they are Medi-Cal billable) at least a week before 12/29/2025 to allow the system to conduct its automated validation, and for the BHS Billing Unit to perform our process of submitting claims on time to the State.
3. Please continue to review and clear your **service errors and 9999 issues** prioritizing the oldest dates of service to meet the Medi-Cal timely filing deadline (12 months from the date of service).
4. The BHS Billing Unit is unable to batch completed services with "charge errors". Examples of charge errors include uncleared Share of Cost, procedure code that creates a lockout situation, invalid client address entry, missing demographics, and others. It is requested that providers review data entry and use the Service Table to avoid invalid or duplicate billing. [The ADS Billing Unit must receive the completed and signed Financial Responsibility and Medi-Cal share of cost \(SOC\) form from SUD programs.](#)

Medicare Advantage Plans (Medicare Part C)



1. Services for SUD non-NTP clients with any of these Medicare Advantage Plans as the COB 1 or primary payer can be directly billed to Medi-Cal for service dates 12/2024 and calendar year 2025.

- a) Molina HealthCare, Part C
- b) Blue Shield Promise of California, Part C
- c) Community Health Group (CHG), Part C

The list of approved FFS Medicare Advantage Equivalent Certification for calendar year 2026 is not available yet. An update will be provided by the County Billing Unit as soon as we have information.



Q&A

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

Or go online for more information at: Optumsandiego.com

NEXT MEETING: Monday January 26, 2025 10:00am – 11:00am