Meeting Goals

Transparency

Engagement

Inclusion

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Meeting Agenda

- General Updates & Reminders

- Help Desk & Reporting

- Access & Training

- System Updates

- Functionality and Requirements

- SOC Resources

- Q&A

General Updates & Reminders

High-level Information about the SmartCare implementation

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SmartCare Status

Success and challenges of go-live

- On September 1, SmartCare went live for the MH and SUD SOC

- Go-live successes:

  - Minimal system slowness

  - Clinical migration completed as planned overall

- Go-live challenges:

  - Considerable access issues due to the various set up configurations

  - CalMHSA help desk format unfamiliar to our SOC

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Entry of Services

Important Reminder

- IMPORTANT REMINDER: Programs should NOT enter any services into CCBH or SanWITS for dates of service occurring before 9/1/2024

- Any services entered in CCBH or SanWITS for dates of service occurring on or after 9/1/2024 will need to be re-entered into SmartCare to avoid billing impacts.

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CCBH Access is View Only

Important Reminder: Do not document in CCBH

- Providers may need to view historic information in CCBH

- Most providers have CCBH access to allow for viewing of information for clients who have been opened to the provider's program.

- If needed, providers may open an assignment for the client in CCBH to view this documentation, and then close in CCBH when the client closes with them in SmartCare.

- Providers should not complete any intake documentation or update any client information in CCBH – this is for view only purposes.

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Site Leads

Thank you to the site leads supporting the SOC during go live!

- Site leads met twice per day during go-live week for briefings, and three times for briefings last week.

- While the site lead briefings have now ceased, other mechanisms are in place for ongoing discussion and escalation.

  - A survey will be sent to site leads this week to capture feedback

  - Site leads will meet again in October for a project closeout meeting & 30-day review.

SmartCare Advisory Group

Continuation of Advisory Group Activities

- Advisory Group meetings will continue to communicate issues, discuss questions about policy changes, and explore post-go live considerations or issues

- QA representatives from the MH and SUD SOC participate to ensure alignment for policy and procedure and SOC concerns

- Purpose is to share information, collaborate on decisions, and to operate under one SOC

Help Desk & Reporting

Process to Access Support

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Issue Reporting & Questions

General Help Desk Processes and Structures

- Contact the CalMHSA help desk first for all SmartCare issues and concerns

- Exception: If you know you need to submit an ARF, complete the ARF form and send directly to MIS at BHS_EHRProject.HHSA@sdcounty.ca.gov

- If you have a question about access and are not sure if an ARF is needed, start by reaching out to the CalMHSA help desk.

- QIMatters.HHSA@sdcounty.ca.gov should be used now only for clinically related questions (as with CCBH and SanWITS)

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Help Desk

Ongoing Support

- Help desk hours available Monday - Friday (7:00am – 7:00pm)

- Preferred order of contact: Chat → Ticket → Phone Call

- Outside normal business hours, call for system outage issues only

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 Access & Training

Details, Requirements

SmartCare Access

Review and updates to role-based access

- BHS recognizes that SmartCare system access has been a significant challenge and is taking steps to remediate.

- In particular, there have been problems with users having the correct role-based access

- BHS is working through a process to review each role in detail to ensure the correct access.

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SmartCare Access

Steps to take if users do not have access

- If **no** email with login information was received by the user:
  - Sent to an alternate email address or in a spam or junk folder
  - No active account in CCBH or SanWITS
  - Did not finish LMS training
  - LMS training account and SmartCare account could not be matched
- All tickets should start with the CalMHSA help desk

New User System Access

Process for new users to SmartCare

- The SmartCare Access Request Form (ARF) must be completed by all new users for access to SmartCare and submitted to BHS per instructions.

  - New Access Request Form (ARF) is taking 7-10 days to process

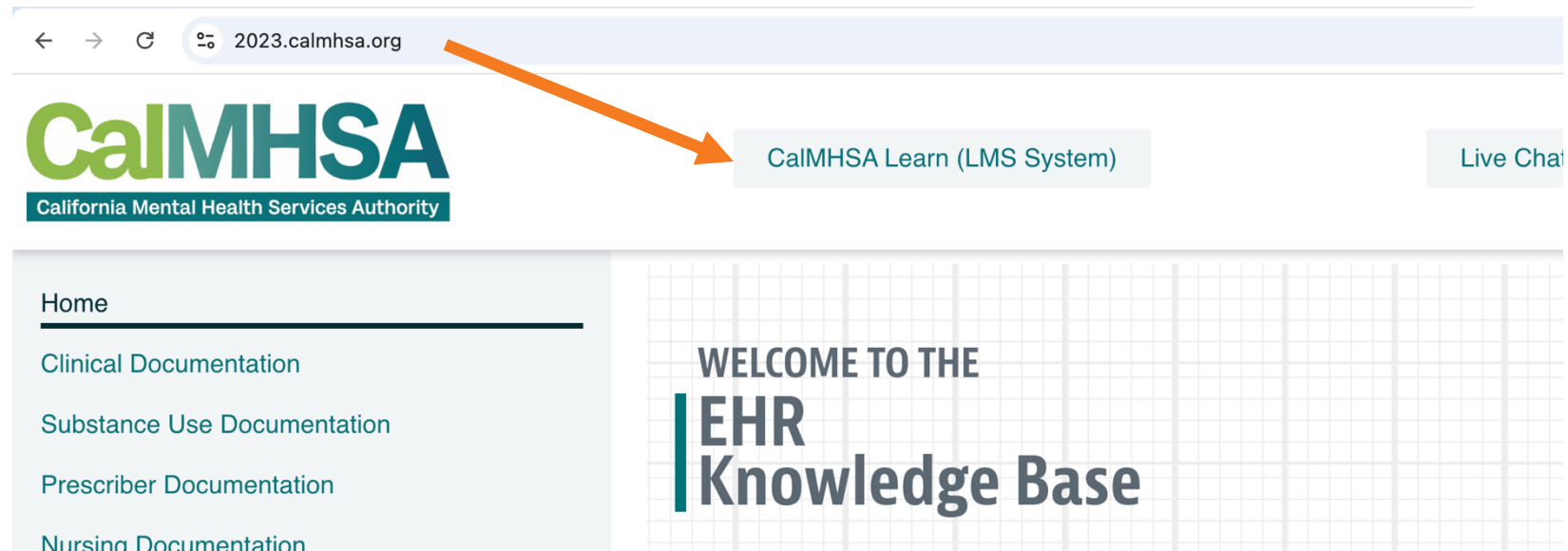- All new users must also complete the required trainings.

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Required Training to Access SmartCare

Complete Required LMS Training ASAP

- The training required to access SmartCare continues to be available via LMS

- **Staff who did not have access to SmartCare at go-live should complete training as soon as possible to get access.**

Supplemental Training

Details and Timeline

- Optum has extended live, in-person supplemental training through October

- New or existing staff can sign up for in-person training across 10 different roles via RegPack

- For residential, crisis residential, and crisis stabilization units, supplemental training is required for access to SmartCare.

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System Updates

Regular maintenance and other updates

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Regularly Scheduled System Maintenance

Details and Timeline

- Regularly scheduled SmartCare system maintenance will occur every Sunday at midnight into Monday morning

- SmartCare will be unavailable for 4-6 hours

- Use downtime procedures during this time

- You may experience extreme slowness if you log in at the end of the maintenance window

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Password Resets

Details and Timeline

- SmartCare passwords must be reset every 90 days

- Users will be prompted at the end of each 90-day period

- Passwords must be at least 8 characters, include upper and lower-case letters, numbers, and a special character.

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SmartCare Functionality and Requirements

Recent Guidance and New Information

Filtering Clients by Program

Requirements and Reminders

- BHS has developed a tip sheet to permanently set a filter to remove clients not in your program.

- This filter will show program administration, front desk, and reception staff a curated view of the clients at the program.

- A tip sheet was shared on September 18 with instructions for setting these filters for program client screen views.

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Client Name / Demographic Changes

Change for SUD SOC (this is already in place for MH)

- SmartCare employs a shared client record across the SOC; thus the BHS Health Information Management Services (HIMS) department will be managing significant client record changes.

- **<u>SOC staff are not to make changes to the following fields</u>: Name, DOB, SSN and Gender.**

- Any changes to these fields need to be submitted to HIMS on form BHS-025 via HIMDEPT.HHSA@sdcounty.ca.gov or secure fax.

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E-Prescribing: CalMHSA Rx

Details and Timeline

- Prior to go-live, it was believed that integration existed between CalMHSA Rx and SmartCare; at go-live BHS learned the integration does not exist.

- To fix this issue, doctors and registered nurses were given direct access to CalMHSA Rx.

  - Doctors currently have access to prescribe medications

  - Registered nurses currently have access to stage medications

- LPHAs will be given access to view and to document existing medications.

- A one-page training is being developed by CalMHSA

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Authorizations

Requirements and Reminders

- CalMHSA is working to allow authorization requests and approvals to be completely maintained in SmartCare; this was not available at go-live.

- The current processes for MH will remain via the County's Prior Authorization request forms or the Optum submission process.

- SUD residential providers will continue to request authorizations via Optum forms and/or current process; Optum will enter approved authorizations into SmartCare.

- Guidance was shared.

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Residential and CSU Bed Assignments

Requirements and Reminders

- For all SUD and MH residential and CSUs, when admitting a client to the bed board, the date of bed assignment MUST be 9/1/2024 due to system functionality.

- If you entered a bed assignment date prior to 9/1/2024, BHS has made edits in the system, changing the bed assignment day to 9/1/2024.

- Anything entered prior to that date will cause billing issues.

Deletion / Error Process

Requirements and Reminders

Errors Providers Can Correct

- Edit note content

- Edit some service details

- Update group participants / facilitators

- Most assessments / forms can be marked in error by user

See CalMHSA site for error instructions

Deletions / Errors Requiring System Administration

- Duplicate Notes

- Documented in wrong client chart

- Wrong procedure

- Program assignment "in error"

Determination grid being completed for release soon

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UMDAP

Requirements and Reminders

- The SmartCare vendor encountered an issue during migration of existing UMDAP information from CCBH into SmartCare.

- A resolution to the issue was identified and it was resolved in the production system on 9/17/2024.

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Updates to TADT Documents

Requirements and Reminders

- The Access to Services Journal (ASJ) is now called Timely Access Data Tool (TADT) in SmartCare

- TADT documents are undergoing minor changes to address recent updates in the July 2024 TADT workbooks. They have been deployed to production environments.

  - DMC-ODS documents now have "urgent" and "prior auth required" fields, including related "time" fields * logic to address requirements.

  - All documents now require entry for "referred to out-of-network provider" regardless of timeliness of access, per DHCS feedback.

New ROI Deployed to Production

On September 9, 2024

- CalMHSA finished testing the new ROI and deployed it to production environments on September 9.

- Information can be found here: https://2023.calmhsa.org/how-to-document-a-release-of-information-authorization-to-disclose-confidential-information/

SOC Resources

Where do I find resources?

Help Desk

Ongoing Support

- Help desk hours available Monday - Friday (7:00am – 7:00pm)

- Preferred order of contact: Chat → Ticket → Phone Call

- Outside normal business hours, call for system outage issues only

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

SUD SOC Resources

Where can I find resources and information?

- For up-to-date information and SUD SOC resources, go to the DMC-ODS Provider page on the Optum website (**follow this link)** and click on the **SmartCare tab**.
  - Resources will be updated accordingly with new project details as they become available

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MH SOC Resources

Where can I find resources and information?

- For up-to-date information and SOC resources, scan the QR code or go to the MHP Provider Documents page on the Optum website (**follow this link)** and click on the **SmartCare tab**.
  - Resources will be updated accordingly with new project details as they become available

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Q&A