



MH and SUD SOC SmartCare Town Hall

August 13, 2024

County of San Diego

Heath and Human Services Agency

Behavioral Health Services



Meeting Goals



Transparency



Engagement



Inclusion



Preparation



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Meeting Agenda

Recap

Timeline

SmartCare Training

Functionality and Requirements

SmartCare Site Leads

SOC Actions

SOC Resources

Q&A



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Recap

What did I miss in the last town hall?



Recap

What did I miss in the last town hall?

The SmartCare training plan was reviewed, including the required and supplemental training details and availability.

An updated SmartCare Required Training Role Grid was shared, providing clarifying detail on the available training by role

Site lead preparation and opportunities to leverage site leads for support prior to, during, and after go-live were discussed.



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Recap

What did I miss in the last town hall?

CCBH and SanWITS training has now ceased and is no longer required for onboarding; New hires should use current applicable CCBH or SanWITS downtime forms available on the Optum website

Providers who currently enter the CANS and PSC into the mHOMS will begin entering into SmartCare at go-live

Providers who currently enter insurance plans into CCBH and SanWITS will NOT be responsible for entry into SmartCare at go-live; Due to access restrictions in billing functionality, BHS Fiscal Billing Unit will enter and manage Client Insurance Plans in SmartCare



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Recap

What did I miss in the last town hall?

- There are numerous forms built into SanWITS and CCBH that the SOC must complete; SmartCare has significantly fewer; BHS is planning to sunset multiple existing forms
- Due to data migration timelines and functionality of both the new and legacy systems, some data re-entry will be required.
- Access to the legacy systems will still be available, though it will become view only.
- BHS strongly recommends outpatient providers (does not include those billing bed days) use the SmartCare scheduling functionality.



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Timeline

High-level Information about the SmartCare implementation



SmartCare Project Timeline

Key Dates



Required CalMHSA LMS Training

Jul 15 – Aug 2



Site Lead Training

Jul 29 – Aug 2



Site Lead Make Up Training Session

Aug 21



Data Migration

Now – Aug 21



Optional Supplemental Training

Aug 5 – Aug 23



Required Supplemental Training (Residential / CSU)

Aug 26 – Aug 30



Recommended e-Prescribing Training (DrFirst)

Aug 19 – Sep 6



Go live:

Sep 1 – Sep 3



SmartCare Training

Details, Timelines, Requirements



Site Lead Training

Details and Timeline

Timeline:

Required Site lead training | Week of July 29 | **Complete**

Make-Up Site lead training | August 21, 1:00pm – 4:00pm | **Register Now**

To register, send an email to politimy.paraskevopoulos@sdcounty.ca.gov before close of business August 19

Ensure you have completed the required LMS Training Modules and passed the knowledge checks with a minimum 80% before attending

Once you have completed all required CalMHSA LMS Modules for your role, visit RegPack to register for additional training.

SMARTCARE REGPACK



Required LMS Training Completion

Complete Required LMS Training ASAP

The SmartCare LMS required training deadline was August 2, 2024.

This required training **must be completed before access to SmartCare is granted.**

The most common issue with training completion: Staff are missing the mandatory Privacy and Security module because they are not scrolling down to the bottom of the screen

BHS cannot commit to extensions for staff who did not complete the LMS training timely to ensure access to SmartCare at go-live.

LMS training completion reports are being shared with site leads. Please monitor training for your program to ensure required training completion.



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Supplemental Training: Overview

Details and Timeline

Designed to provide extra instruction in a live training environment

Timeline (**Registration Now Open!**):

Optional Outpatient and Specialty Training | August 5 – August 23

Required Residential and CSU | August 26 – August 30

Recommended DrFirst E-prescribing | August 19 – September 6

Ensure you have completed the required LMS Training Modules and passed the knowledge checks with a minimum 80% before enrolling

Once you have completed all required CalMHSA LMS Modules for your role, visit RegPack to register for additional training.

SMARTCARE REGPACK



SmartCare Required Training Role Grid

SmartCare Role	Description/Scope of Role	CalMHSA Learning Management System (LMS) Moodle Videos Minimally Required LMS Modules by Role						Optional & Required Supplemental Live Training Begins week of August 5. Both in-person (3 hours) or live virtual (90 minutes) options are available unless otherwise noted below.	
Admin Clerical Front Desk (LMS estimate: 2 hrs)	Reception and Data Entry staff who add clients, schedule, and enter services and other non-clinical info. Includes programs who have their own EHR.	SmartCar e Basics for All Users	SmartCare for Front Desk Staff	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Request for Services, Screening and Intake and Assessment				Supplemental Live Training is optional.	
Clinical Direct Service (LMS estimate: 3 ½ hrs)	LPHA/Clinicians AND non-LPHA who provide direct services and work under an LPHA, such as substance abuse counselors, and peer support specialists.	SmartCar e Basics for All Users	SmartCare Calendar Management for Providers	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Services, Screening and Intake and Assessment b. Life Cycle of a Client: Services		Clinical Workflow Training	SmartCare for Group Service Providers	Supplemental Live Training is optional.	
Prescribers and Nurses (LMS estimate: 4 hrs)		SmartCar e Basics for All Users	SmartCare Calendar Management for Providers	SmartCar e for Front Desk Staff	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client b. Life Cycle of a Client: Services		SmartCare for Prescribers, Nurses, and Med Support Staff	Supplemental Live Training is optional. Additional, virtual-only e-prescribing specific training will be required and provided later in August. More information coming soon!	
Admin Billing Only (LMS estimate: 90 min)	Staff who handle billing functions for their program, such as clearing of suspense reports or preparing claims.	SmartCar e Basics for All Users						Supplemental Live Training is highly encouraged as there is no CalMHSA LMS training specific to program billing workflows. This Training will focus on where to find and enter billing info. Further guidance on billing workflows to be provided by County Fiscal (BHS Billing Units for MH & SUD).	
Program Managers, QA, and CORs Teams* (LMS estimate: 4 ¾ hrs)	Staff who need to know both admin and clinical workflows. *Note COR Team staff should take this LMS track only if they want to take the Supplemental Live Training; they may also follow ‘Reporting’ track below.	SmartCar e Basics for All Users	SmartCare Calendar Management for Providers	SmartCar e for Front Desk Staff	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Services, Screening and Intake and Assessment b. Life Cycle of a Client: Services		Clinical Workflow Training	SmartCar e for Group Service Providers	Supplemental Live Training is highly encouraged as there is no CalMHSA LMS training specific to managers. This Training will highlight oversight tools in SmartCare, such as dashboards and reporting that will be helpful for those overseeing program operations and integrity.
Residential, Crisis Residential, and CSU (LMS estimate: 90 min)	For program staff who will be using SmartCare as their EHR.	SmartCar e Basics for All Users							Supplemental Live Training is required as there is no CalMHSA LMS Training or documentation for these modules. This training will be August 26-30. More information coming soon!
Read Only (LMS estimate: 90 min)	Users who do not enter data but view and print, such as Jail Social Workers, SDCPH MDs, and medical records staff.	SmartCar e Basics for All Users	While staff in Read Only roles may take additional CalMHSA LMS modules to familiarize themselves with the documentation they view, this is not required.						Additional documentation supports for Read Only workflows are coming soon!
Reporting (LMS estimate: 90 min)	Staff who run reports for their legal entity or multiple entities (i.e., UCSD or COR Teams*)	SmartCar e Basics	While staff in Reporting ad Only roles may take additional CalMHSA LMS modules to familiarize themselves with the documentation they view, this is not required.						Additional documentation supports for Reporting processes are coming soon!

Supplemental Training: Outpatient + Specialty

Details and Timeline

Training is occurring August 5 - 23

Registration is now available!

Currently, a total of 131 classes are available to choose from
83 onsite and 48 online

To enroll, create an account and register for Regpack.

Choose your role and modality to find applicable classes

Choose your course: online and onsite options, various days and times (including night shift.)



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Supplemental Training: Residential, Crisis Residential and CSU

Details and Timeline

All users required to take SmartCare Basics LMS (90 minutes)

All users **required to take Supplemental live training** as there is no CalMHSA LMS training or documentation for these modules

Training will occur August 26-30

To enroll, create an account and register for RegPack.

- Choose your role and modality to find applicable classes

Residential and CSU workflows were sent directly to providers. If you did not receive them, please contact Heather.Rey@sdcounty.ca.gov.



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E-Prescribing in SmartCare: DrFirst

What is DrFirst?

- **Behavioral Health Services (BHS) will implement a new electronic prescribing (e-prescribing) component with the SmartCare go-live called DrFirst.**
- DrFirst is a medication management software that will seamlessly integrate with SmartCare for e-prescribing, meaning no additional login will be required.
- Doctors who will use SmartCare to e-prescribe and staff who will set up or stage medications will use DrFirst.



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DrFirst Training

Recommended E-Prescriber Training

Training is occurring August 19 – September 6

Registration is now available! Encourage prescribers to register as soon as possible.

Currently, a total of 6 classes are available to choose from
2-hour virtual session via WebEx

To enroll, create an account and register for Regpack.

Choose your role and modality to find applicable classes

Choose your course



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Functionality and Requirements

Recent Guidance and New Information



DrFirst

Important information about functionality

- Primary and backup tokens are required in SmartCare
- For primary tokens, the County recommends prescribers use a cell phone, **which requires installation of the Symantec VIP access app.**
- For backup tokens, there are two options:
 - A hard token can be mailed from the vendor (takes ~7-10 days)
 - A second cell phone or other device, like a tablet, can be used, and will also require installation of the Symantec VIP access app.
- Prescribers will receive an email from DrFirst in the next few weeks
 - Login must occur and approximately 10 min is required for setup



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SmartCare Login

Instructions for login at go-live

- An email will be sent to all users with username, URL, and instructions for a password reset right before go-live.
- Process is similar to logging into the TRAIN environment



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Data Migration

Timeline and Data Re-entry Updates

The last client demographic data migration from CCBH and SanWITS to SmartCare before go-live is currently data entered through approximately Aug 22.

Last Clinical PDF data (assessments, client plans, progress notes) was July 29

Last PDF data migration for diagnosis, allergies, and medications is August 23

BHS is still working on final data migration before go-live on Aug 31; However, **some data will need to be reviewed and/or re-entered.**

Diagnoses must be reviewed

Problem lists must be re-entered by the program

Medication history can populate from DrFirst to SmartCare by a prescriber; otherwise it will need to be re-entered.



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Data Type & System of Origin	Location in SmartCare	Data Delta (Gap)	What This Means
Essential demographic and active diagnosis data for all CCBH clients, including Insyst clients. Includes CCBH client ID, open authorizations and scheduled appointments	Into these same fields/screens inside of SmartCare	Data pulling through ~Aug 22	These data fields, if entered after this date, will not be migrated into SmartCare. Dual data entry will be needed.
Essential SanWITS demographic and active diagnosis information on all clients since 2018 and most other older clients.	Into these same fields/screens inside of SmartCare	Data pulling through ~Aug 22	These data fields, if entered after this date, will not be migrated into SmartCare. Dual data entry will be needed.
CCBH inactive diagnoses, medications and allergies from past 2 years	Into SmartCare 'Clinical Care Document' PDF folder	Data pulling through ~Aug 23	These PDFs are available to lessen the need for staff to move back and forth between SmartCare and legacy systems at Go Live. However, this data still needs to be entered into the appropriate screens in SmartCare. There also may be a clinical need to review CCBH for information entered within a week of Go-Live.
Most recent Behavioral Health Assessment (Adult/Child), Crisis Stabilization Summary, Mobile Crisis Assessment, Discharge Summary if within past 2 years.	Into SmartCare PDF Folder	Data pulling through July 29	These PDFs are available to lessen the need for staff to move back and forth between SmartCare and legacy systems at Go Live. However, this data still needs to be entered into the appropriate screens in SmartCare. There also may be a clinical need to review CCBH for information entered within a week of Go-Live.

Bed Assignments

Details at Go-Live

Crisis Stabilization Units, Crisis Residential, and Residential programs
will need to enter bed assignments at go-live



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Authorizations

Requirements and Reminders

- Authorizations will be completed on paper and submitted to Optum via fax or through their form.
- Optum will then enter the Authorizations into the SmartCare system.
- Programs will be able to see the Authorizations in SmartCare
- Additional information will be shared as soon as it is available.



SUDURM / UCRM

Changes to Uniform Records Manuals

- There are numerous forms built into SanWITS and CCBH that the SOC must complete; SmartCare has significantly fewer
- BHS will sunset multiple existing forms and create new forms to align with SmartCare data entry
- A grid with planned changes for the existing SUDURM and UCRM forms will be shared with the SOC this week and posted to the SmartCare tab of the Optum website



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DMC-ODS: ASAM

For SUD programs not using SmartCare

- ASAM entry will be completed via a spreadsheet submission.
- Additional detail on the process for submission is coming soon.



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Then and Now

Guidance to review legacy system process & SmartCare functionality

With the transition to SmartCare, several processes will be different.

For example, consents, EBP tracking, authorizations, NOABDs, etc..

A document designed to inform users how to navigate new options in SmartCare while ensuring current regulations and requirements are met will be shared with the SOC and posted to the SmartCare tab of the Optum website.

For some of these items, additional guidance has also been shared



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SUD & MH Workflows

High level workflows for most program requirements

Document outlining high level workflows for MH and SUD SOC

Identifies aspects of your workflow, what it is called for MH and SUD, and pro tips within SmartCare

Examples include looking up clients, scheduling client services, completing timeliness records, and screening clients

This document will be shared with the SOC and posted to the SmartCare tab of the Optum website.





Go-Live Preparations

What You Can Do Now to Prepare



Go-Live Preparations

Considerations as you prepare for go live

Know your go-live date: Sept 1, Sept 2 (Labor Day), or Sept 3

Track mandatory training completion

Know your downtime procedures

Be prepared for on-site login support (frequent issue at go-live)

The image shows a login form for Streamline Healthcare Solutions, L.L.C. The form includes a logo at the top, followed by 'Username' and 'Password' labels. Below these are input fields with placeholder text 'Enter Username' and 'Enter Password'. A 'Remember me' checkbox is located below the password field. A 'LOGIN' button is to the right of the checkbox. At the bottom, there are two links: 'Forgot your Username?' and 'Forgot your Password?'. Three red circles with numbers 1, 2, and 3 are overlaid on the form. Circle 1 is over the 'Forgot your Username?' link. Circle 2 is over the 'Forgot your Password?' link. Circle 3 is over the 'Remember me' checkbox.

Streamline
Healthcare Solutions, L.L.C.

Username
Enter Username

Password
Enter Password

☐ Remember me

LOGIN

[Forgot your Username?](#) [Forgot your Password?](#)

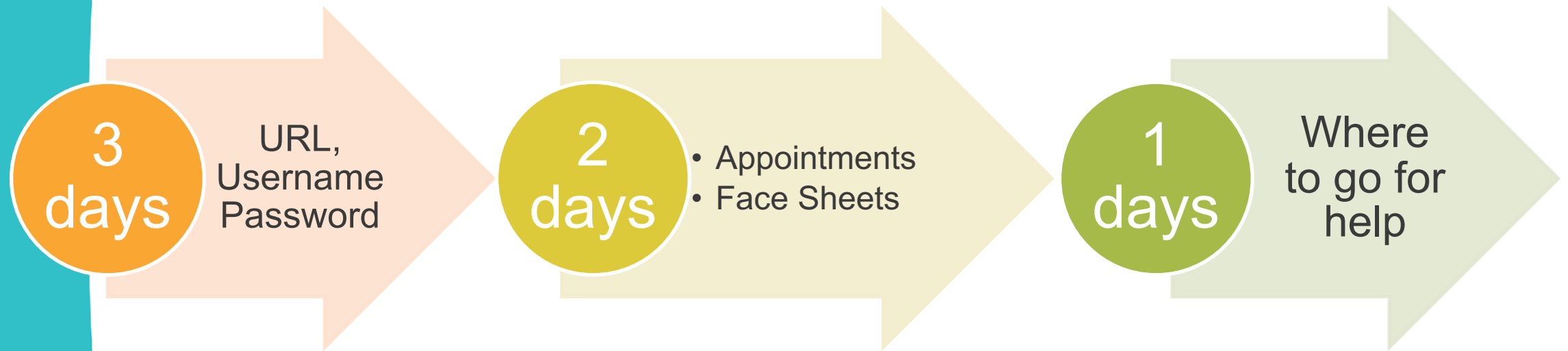
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Go-Live Preparations

Considerations as you prepare for go live



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Manage Expectations

Go-Lives are always bumpy rides

You (and everyone else) will not be an expert at go-live

No one will feel comfortable or like they “know what they are doing”

Expectations and reality may be at odds

Fits and starts we may need to pivot or change course; prepare yourself and others for the inevitable.

Be optimistic and be resilient: frustrations will run high



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SOC Actions

What can you do now to prepare?



SOC Actions

What should the SOC do now to prepare?

- Ensure all SmartCare users at your site have completed required training.
 - The required training deadline has passed, except for Residential, CSU, and e-prescribing.
 - **Access at go-live is not guaranteed; please ensure users complete as soon as possible.**
 - Remind staff to scroll down to the bottom of the screen to complete the mandatory Privacy and Security
- Log in to practice in the TRAIN domain



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SOC Actions

What should the SOC do now to prepare?

- Begin the process to **install the Symantec VIP access app** if you need lead time to add to your list of downloadable apps for business phones.
- **Orient new hires on downtime forms** after CCBH and SanWITS training ceases and before SmartCare go-live
- Begin to **plan for go-live at your site**; know your downtime procedures.
- **Ensure your site lead is oriented to onsite plans** for downtime and go-live.



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SOC Actions

What should the SOC do now to prepare?

- **Maintain your awareness** about project status
- **Review all guidance and info notices** in preparation for go-live.
- **Communicate with your staff** to raise their awareness
- Visit the CalMHSA website to **review SmartCare materials** (<https://2023.calmhsa.org>)
- Review the **EHR Essentials Guide** →

EHR Essentials *★ Quick Guide*

SmartCare Clicking on the **SmartCare** icon will bring you back to your home page.

The **Search** icon will allow you to quickly search for screens and list pages within SmartCare.

The **Client Search** icon will allow you to search for a client by their name or ID number.

Use this paper icon to make a new document.

Use the **Favorite Search** icon to quickly view anything you've saved as a favorite.

Using the **Add Favorite** icon will allow you to bookmark screens and list pages, which keeps all your filtered settings.

Select this to **Close** the current screen or document you are in.

The **History** icon will open a window that displays the last 13 patients and QuickLinks you have accessed in your current session.

The **Unsaved Changes** icon will display a list of screens that you made changes to but navigated away from before saving.

More Detail: Select this to expand the document ribbon and see more information about the document.

You can use the **Zoom** or magnify settings on your web browser to better view information in SmartCare.

This will bring up the **Walk Me** helper. This is where you can find full walk-throughs of how to complete a process in SmartCare.

Hovering on **Information** will provide you with CalMHSA help text.

The **Help** icon will take you to CalMHSA's Training Tools page. This has user guides and helpful videos.

Client Flag: If a client has a flag, it will appear next to their name.

Smart View makes a pop-up that displays critical information about the client.

Client Information
When you hover over the client's name, a window will pop up with the most important information about the person you're serving.

Notes:

- You can filter **List Page** data in many different ways. This will make it easy to review relevant data very quickly.
- Anything with **underlined text** is hyperlinked and will help you easily navigate in SmartCare.
- **Scan the QR code** for up-to-date training tips and instructional videos.

CalMHSA.org Updated 6/6/23

CalMHSA



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SOC Resources

What happens next?



Next Town Hall

We will host one more town hall in August – Join us:

August Town Hall 2:

Tuesday, August 27, 2024 at 1:00pm



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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



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

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

Or go online for more information at: [**Optumsandiego.com**](http://Optumsandiego.com)

