



To:	BHS County-Operated Providers and BHS Contracted Service Providers
From:	Behavioral Health Services
Date:	August 28, 2024
Title	Summary of SmartCare Implementation Updates

SmartCare will be implemented as the electronic health record (EHR) for both the mental health (MH) and substance use disorder (SUD) systems of care (SOC) on September 1, 2024. This information notice serves as a summary of recent guidance shared with the SOC in preparation for go-live. Please also see the slide deck from the August 27, 2024 Town Hall on the SmartCare tab of the MHP Provider Documents or DMC-ODS pages of the Optum website.

GO-LIVE PREPARATIONS

IMPORTANT GO-LIVE PREPARATION INFORMATION

- Stop using CCBH or SanWITS at midnight Saturday, August 31 and use downtime processes until 7:00 AM on Sunday, September 1.
- **On the day of your go-live, check your email before logging into the SmartCare system for any final instructions**, including go or no-go communications and data migration details.
- Be prepared to pivot back to CCBH and SanWITS, or to move to paper until further instructions.
- Print the [Help Desk Support flyer](#) for important help desk information during go-live week.

OTHER CONSIDERATIONS FOR GO-LIVE PREPARATION

The following considerations are intended to help you prepare your site for go-live.

1. **Know your go-live date.** Based on your hours of operation, go-live will be on September 1, September 2 (Labor Day), or September 3.
2. **Track mandatory training completion** and encourage optional supplementary training participation. **Ensure all staff have completed mandatory trainings as soon as possible to ensure access at go-live.**
3. If applicable, seek approval to **download the Symantec VIP access application** for prescribers.
4. **Know your downtime procedures** and ensure your program management and site leads are prepared for go-live at each facility.
5. **Orient new hires on downtime forms** before SmartCare go-live.
6. **Be prepared for on-site login support;** this is one of the most frequent issues during a go-live.
7. If applicable, **print the schedule for the next two weeks** and consider printing Fact Sheets or Client Profile.
8. **Know where to go for help** and leverage the extra knowledge gained by site leads through their participation. Site leads will receive guidance summarizing where to go for help depending on the situation.

For More Information:

- Check the SmartCare tab on the Optum website under [MHP Provider Documents](#) for the MH SOC or [DMC-ODS Provider Documents](#) for the SUD SOC.
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REQUIREMENTS AND FUNCTIONALITY

ELECTRONIC PRESCRIBING

Updated DrFirst e-prescribing guidance including registration, tokens, the identity verification process, and other important information was shared with the System of Care on August 26, 2024 and can be found here on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website. Of particular note:

- Effective at go-live on September 1, 2024, the DrFirst e-prescribing components will be rebranded with a new name and logo, called CalMHSA Rx. When you log in to the new system for the first time, you will no longer see the DrFirst or Rcopia name and logos that staff may have seen during training or in training documentation.
- Prescribers who need to be set up to electronically prescribe controlled substances (EPCS) must go through an identity proofing process before prescribing medications. Both primary and backup tokens are required in SmartCare. See the aforementioned guidance for more detail.
- Prescriber name in the NPI registry must match DrFirst. If they do not match, the invitation fails. Prescribers may need to verify their name and spelling in the NPI Registry.

SMARTCARE DATA MIGRATION

Updated data migration guidance was shared with the System of Care on August 26, 2024. **Please review these important updates on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.** Please review the data migration timeline and data re-entry requirements at go-live.

For new CCBH and SanWITS clients, most critical demographic data (client information and assignment or episode) are planned to migrate through August 30 at 4:00pm. BHS will attempt to manually enter clients created in the legacy systems after this time and before go-live. **Please look for a communication from the project team before you add any new clients.**

CCBH SAFETY ALERTS

CCBH Safety alerts will not migrate to SmartCare. At go-live, safety alerts should be noted in the ‘client flags’ section of SmartCare to ensure they show for all users.

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MEDICATION MIGRATION AND ENTRY INTO SMARTCARE

It was shared in past communications that medications will need to be re-entered into SmartCare at go-live. It has since been determined that at this time, medication re-entry into SmartCare medication screens is not needed and we can await integration functionality between DrFirst/CalMHSA Rx and SmartCare. Prescribers and nurses will have access to current and historical medications through the DrFirst/CalMHSA Rx module and all clinical users will have access to CCBH medication history via SmartCare PDF (and in CCBH). It is suggested that new medications be documented in a progress note for visibility of the clinical team, but this is not required.

SMARTCARE ACCESS REQUEST FORMS (ARF)

The new SmartCare ARF is now available [on the Optum website](#).

DMC-ODS: ASAM PROCESS FOR NON-SMARTCARE USERS

For legal entities / SUD programs who are not using SmartCare as their primary EHR for documentation, BHS has developed a process for ASAM data submission that will reduce the need for dual entry and administrative burden. On a monthly basis, legal entities not reporting client ASAM via SmartCare, shall track and submit client and ASAM data to MIS for reporting to DHCS. Additional detail was shared with the System of Care on August 26, 2024 and can be found [on the SmartCare tab](#) of the DMC-ODS page of the Optum website. Also on the [DMC-ODS page](#) under the section titled “Requirements and Functionality” is the *ASAM reporting tool*, which can be downloaded for use.

CLIENT NAME OR DEMOGRAPHIC CHANGES FOR THE SUD SOC

Because SmartCare employs a shared client record across the system of care, the BHS Health Information Management Services (HIMS) department will be managing significant client record changes. **SOC staff are not to make changes to Name, date of birth, social security number, and gender in SmartCare.** Any changes to these fields need to be submitted to the HIMS department. HIMS will also handle potential duplicate clients. Additional information from the SUD Quality Assurance department is forthcoming.

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AUTHORIZATIONS

Prior to submitting an authorization request to Optum, programs should create program enrollment or put a client in requested status for the requested level of care. Then, authorizations will be completed on paper and submitted to Optum via fax or through their form. Optum will enter the Authorizations into the SmartCare system and programs will be able to see the Authorizations in SmartCare. Additional guidance is forthcoming and will be posted to the SmartCare tab of the Optum website under the section titled “Requirements and Functionality.”

NOTICE OF ADVERSE BENEFIT DETERMINATION (NOABD)

BHS Quality Assurance (QA) is responsible for monitoring program compliance with client rights, such as issuance of NOABD’s. NOABD’s are on hold in SmartCare until the process of updating templates in SmartCare and testing functionality is complete. This means a manual process for reporting NOABD info is needed. A revised tracking log was developed for use by MH and SUD SOC; programs shall track and submit client NOABD data to QA per the current process until the functionality exists in SmartCare. Additional guidance for NOABDs was sent to the system of care and can be found on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website. Also available on the [MHP Provider Documents](#) and [DMC-ODS page](#) under the section titled “Requirements and Functionality” is the *NOABD log FY24-25*, which can be downloaded for use.

SMARTCARE PROGRAM CROSSWALK

A crosswalk of programs from SanWITS or CCBH to SmartCare has been shared with the System of Care. It is available to download as an Excel file called *SmartCare Program Crosswalk (xlsx)* on the SmartCare tab of the [MHP Provider Documents](#) and [DMC-ODS page](#) under the section titled “Requirements and Functionality.”

DOCUMENT SCANNING

BHS learned that an additional driver is needed for efficient document scanning in SmartCare. The additional driver will allow for a single step process for end users to scan documents directly into SmartCare. **Providers who need scanning capabilities should install a new driver on applicable devices.** Details and the process for scanning with or without the driver can be found in the Information Notice shared with the system of care on August 23, 2024, available on the SmartCare tab of the [MHP Provider Documents](#) or [DMC-ODS pages](#) of the Optum website.

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ADDITIONAL GUIDANCE PREVIOUSLY SHARED WITH THE SOC

- **Then and Now EHR Functionality** assists users with navigating new options in SmartCare while ensuring compliance with regulations and requirements: [DMC-ODS link](#) | [MHP Provider Documents Link](#)
- **SUD and MH Workflows document** outlines new workflows for the SOC including naming and tips for navigation: [DMC-ODS link](#) | [MHP Provider Documents Link](#)
- **SmartCare Walk-in Workflow:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **SmartCare Standalone Services Workflow (SUD only):** [DMC-ODS link](#)
- **Non-Billable Procedure Codes for SUD and MH SOC** highlights all nonbillable actions that can be entered into the SmartCare system: [DMC-ODS link](#) | [MHP Provider Documents Link](#)
- **Hardware Software, and Network Requirements – March 2024:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Client Insurance Entry Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Entry of CANS and PSC into SmartCare Guidance:** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Changes to Uniform Records Manuals (UCRM / SUDURM):** [DMC-ODS link](#) | [MHP Provider Documents link](#)
- **Training by Role Grid (Updated July 30, 2024):** [MHP Provider Documents link](#) | [DMC-ODS link](#).
- **CCBH Training and Documentation Guidance**, summarizes program actions for both new hires and current CCBH users after June 26, 2024.
- **SanWITS Training and Documentation Guidance**, summarizes program actions for both new hires and current SanWITS users after July 17, 2024.

TRAINING

SMARTCARE EHR TRAINING UPDATES

The SmartCare LMS required training deadline for all users except residential, crisis stabilization unit (CSU), and e-prescribers was August 2, 2024. **The required training must be completed before access to SmartCare is granted.** Staff who do not have access to SmartCare at go-live should complete training as soon as possible to be granted access.

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Starting on August 21, users were sent one of three messages indicating whether they had completed the required training modules. Please follow any instructions in the email to address deficiencies if your message stated “not complete” or “not able to match”.

For residential, crisis residential, and crisis stabilization unit (CSU) programs, required supplemental training is occurring through August 30. New classes were added and class sizes increased to accommodate demand. In addition, some enrollment requirements were lifted. If users were unable to sign up for a session, please revisit [RegPack](#) to assess availability.

For DrFirst (e-prescribing) training, there are two remaining classes taking place on September 5 and September 6. Encourage prescribers to register as soon as possible if they have not already taken the 2-hour virtual class.

POST GO-LIVE SCHEDULED PRACTICE SESSIONS AND OFFICE HOURS

To support users through the SmartCare go-live, Optum is offering Scheduled Practice Sessions and Office Hours September 3 – September 13. Please see below for details, including how to join.

Scheduled Practice Sessions: Scheduled practice sessions are offered in a classroom setting based on role. This is a quiet practice environment similar to a study hall. There is no agenda; attendees identify which SmartCare functions they want to practice in the Train domain. Program staff can arrive or depart at their leisure within the 3 hour block. Onsite or online training between August 5 and August 30 is strongly recommended. The focus is on navigating the system- not on trouble tickets or system issues. Trainers will circulate and assist whenever program staff find themselves ‘stuck’.

Registration by role for one of eighteen (18) Scheduled Practice Sessions is now open in [RegPack](#).

Office Hours: Office hours are virtual sessions where users can “drop in” based on role. Like Scheduled Practice Sessions, these are intended for program staff who know what function they want to perform in SmartCare, but aren’t sure how to do it. Trainers won’t be advising program staff what they should do in the system, nor will they resolve live access issues or elevate system issues. The following office hours are available, and users can drop in by joining this MS Teams Link: [Join the meeting now](#)

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Date	Day and Time	Virtual
Week 1		
3-Sep	Tuesday (3pm-4pm)	Residential and Crisis Residential Clinical/Nurses/Prescribers
4-Sep	Wednesday (9am-10am)	Nurses
4-Sep	Wednesday (3pm-4pm)	Clinical Direct Service
5-Sep	Thursday (3pm-4pm)	Program Managers, CORs, and QA
6-Sep	Friday (9am-10am)	Prescribers
Week 2		
9-Sep	Monday (9am-10am)	Residential and Crisis Residential Clerical
10-Sep	Tuesday (3pm-4pm)	CSU Clinical/Nurses/Prescribers
11-Sep	Wednesday (9am-10am)	Admin Billing Only
12-Sep	Thursday (3pm-4pm)	Admin Clerical Front Desk
13-Sep	Friday (9am-10am)	CSU Clerical

For questions, contact sdu_sdtraining@optum.com.

ADDITIONAL INFORMATION AND REMINDERS

RESOURCES TO SUPPORT YOUR PREPARATION

- Maintain your own awareness about project status to prepare for SmartCare go-live.** This includes continued review of status updates and other materials available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website, participate in town halls, and discussions with your COR or supervisor.
- Review the SmartCare FAQs.** Please review the FAQs, available on the SmartCare tab of the [MHP Provider Page](#) or [Drug Medi-Cal Organized Delivery System](#) on the Optum website.
- Visit the EHR Knowledge Base on the CalMHSA website.** Numerous resources are available on the website which answer questions about workflow and functionality of SmartCare. You will find training guides, videos, at-a-glance workflows, FAQs, and more.

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MANAGE EXPECTATIONS

In communication with staff, it is important to manage expectations. The following messages may be helpful in your on-site preparations.

- Go-lives are always bumpy rides
- You (and everyone else) will not be an expert at go-live
- It is normal to feel uncomfortable or uncertain during these types of transitions
- Expectations and reality may be at odds
- We may need to pivot or change course; prepare yourself and others for the inevitable
- Be optimistic and be resilient: frustrations will run high

KEY UPCOMING DATES

Training

- **August 26 – August 30, 2024** | Required Supplementary SmartCare Classroom or Online Virtual Training for Residential or CSU users
- **August 19 – September 6, 2024** | Recommended E-Prescribing Training
- **September 6 – September 13, 2024** | Scheduled Practice Sessions and Office Hours

Go-Live

- **September 1, 2024**

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