



SmartCare User Group

County of San Diego

Health and Human Services Agency

Behavioral Health Services

August 7, 2025

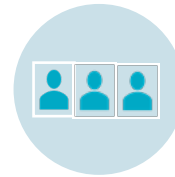
Meeting Goals



Transparency



Engagement



Inclusion

Meeting Agenda



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



Clinical Updates: Group Service Details Screen



- **Group Service Details** screen redesigned using a split-tab layout within the Service Tab:
 - “Services” tab renamed to “Group”
 - Sub-tabs added: “**Group Details**” and “**Services**”
 - Reduces scrolling, maximizes space available for each content block, improves clarity and usability

NEW
Group Details sub-tab



Group Service Detail

Group

Note

Other

Group Details

Services

Group

Group

Test IS clinician

Date

06/09/2025

Location

AOT Hospital Visit

Place of Service

Status

Show

Group Comment

This practice lesson consists of short paragraphs about interesting subjects. Find fun keyboard typing practice--and learn something new! Our paragraph practice is great typing

The comment in this field is for internal use only, please enter clinical group documentation in the Note tab.

Specific Location

Newfolden, MN 56738

Evidence Based Practices

Staff

Add Staff...

	Staff Name	Unit	Type	Start	End
X	TestingTG, Sahana	10	Minutes	8:00 PM	8:10 PM
X	Test, Suganya	10	Minutes	8:00 PM	8:10 PM
X	Admin, Systems	10	Minutes	8:00 PM	8:10 PM

Clinical Updates: Client Information (Client) Screen



Changes to Client Information (Client) Screen:

- “Sex” field changed to “Sex assigned at birth”
- New field added to Client Information Screen: “Sex Parameter for Clinical Use”
 - This is a required field that must be answered
 - Drop Down Menu Options:
 - Male
 - Female
 - Non-Binary
 - Other
 - Choose not to disclose
 - Unknown

Client Information (Client) Screen



Adobe Acrobat

Test_Address5 (7040)

Client Information(C)

Demographics - Identifying Information - Sex Parameter for Clinical Use is required.

General Demographics Client Episodes Contacts Primary care referral Financial Release of Information Log Hospitalization

Aliases SA Demographics Referral Special Rates Family External Referral Timeliness Reporting Interfaces Foster Care

HAT External Identifications Custom Fields

Identifying Information

Date of Birth 08/21/1977 Age 47 Years Sex assigned at birth Male

Marital Status Married Gender Identity Transgender - female Sexual Orientation Lesbian, gay or bisexual

Sex Parameter for Clinical Use

Deceased On 06/15/2025 Cause of Death Cardiac Arrest Pronoun He

Pregnant ☐ Yes ☒ No ☐ N/A

Ethnicity

Another Hispanic, Latino/a, or Spanish Origin ☒ Central American ☒ Chicano/a ☐ Cuban

Race

☒ Alaskan Native ☒ American Indian and Alaskan Native ☒ Asian ☐ Black ☐ Black or African American

Client declined to provide

☒ Criminal Justice ☒ Date of Birth ☒ Ethnicity ☐ Financial Information ☐ Gender Identity

Primary Care Physician

Primary Care Physician: v - updated, v - updated

Organization: Test ThruX

Phone #: 345-6454

PCP Email: x@email.com

☐ Client does not have PCP

Open PC Providers

Group Progress Notes

Co-facilitators



Group Note Documentation with Co-facilitators – current workflow options

- Each co-facilitator completes a separate group note for the group service
 - *This workflow is required if co-facilitators do not share credential level to claim same group procedure code – example: MHRS and Peer Support Specialist co-facilitate group*
- Lead facilitator completes one group note
 - Notes both providers participation
 - Assigns co-facilitator as co-signer
 - Co-facilitator reviews for accuracy and agreement
 - Co-facilitator co-signs the group note(s).

Group Progress Notes

Co-facilitators – KNOWN ISSUE



Group Note Documentation with Co-facilitators – KNOWN ISSUE

- When the Lead facilitator completes one group note and assigns the co-facilitator
 - The system automatically generates a note for that co-facilitator
 - The progress note remains blank & “In Progress” status if the co-facilitator does not document on it.
 - Remains on providers widget as “In Progress”

Current Options

1. Each provider complete separate group notes documenting their unique contribution and role/interventions within the group. This eliminates “In Progress” note creation.
2. Co-facilitator documents in the “In Progress” note that is generated “See parent note created on [Date] and signs note, which moves the note out of the “In Progress” status.

Revoked Releases of Information



Revoked Release of Information

- Previous: All ROIs are listed on the Client Information Screen (Client) under the Release of Information Log tab. Revoked ROI's remained in this list with the end date indicated.
- Updated: Revoked ROI's will be removed from List of Releases
 - CalMHSA functionality change due to potential privacy risk created when revoked ROI remains on Release of Information Log
- ROI guides are posted on CalMHSA site for further information
 - [How to Document a Release of Information \(Authorization to Disclose Confidential Information\) - 2023 CalMHSA](#)
 - [How to Revoke a Standard Release of Information/Authorization to Disclose Information - 2023 CalMHSA](#)



SmartCare User Group: MIS

Rebecca Ferry-Rutkoff, Adrian Escamilla

Staff Administration



- The Clinical Trainee Degree Name is now required in SmartCare (e.g., LCSW CT, LMFT CT, LPCC CT).
 - Previously entered as Master's Degree LPHA CT.
- For existing Clinical Trainees, an email has been sent to staff to collect this information.
- For new Clinical Trainees, please indicate the degree name on the ARF (comment box).

Staff Admin cont.



- When a staff renews their license, the staff member should email MIS at BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov and provide the new expiration date.
- MIS will verify the license online and update the information in SmartCare.
- MIS runs a monthly report to identify all licenses that will expire in the next 30 days and emails the staff to notify them. Staff can also respond to this email to provide the new expiration date.
- An ARF is not necessary for license renewals.
- An ARF submission is required when a credential or license has changed.
- The current processing time for ARFs is 6-7 business days.

Deceased Clients



- Do not deactivate clients in SmartCare. This is only done by HIMS.
- When a client passes away, please submit a [BHS 025 Form](#) to HIMDept.HHSA@sdcounty.ca.gov.
- HIMS will deactivate the client and enter the deceased date in SmartCare.
 - All client enrollments must be closed.
- The BHS 025 Form should also be used to report any changes to a client's Name, DOB, SSN, or Gender.

General Information

Type of Client ☒ Individual ☐ Organization

Client ID SSN [Modify...](#) Do Not Use Search Do Not Use Search

Prefix First Name Middle Name Last Name Suffix

E-Mail Medi-Cal ID ☒ Active Professional Suffix

Medicare Beneficiary ID

Patient Portal ID [Create](#) [Reset](#)

My Reported Errors



- When submitting a ticket to My Reported Errors and the only request is to remove an add-on code(s), please indicate this in the Comment box.
 - The add-on code(s) can be removed from a service without impacting the note.
- If a staff is no longer with your program, this should be noted in the Comment box.
 - MIS also runs a weekly report to help capture inactive staff for My Reported Errors.
- Reminder, all residential clients must be discharged from the bed.
 - Bed day services will continue to generate daily until the client is discharged from the bed.

Support Desk



CalMHSA

- SmartCare support for system issues
- Hours: M-F 8 am – 5 pm
- Live Chat or Submit a Ticket

Optum Support Team

- Password Resets & Account Unlocks
- 7 Days a week (including Weekends & Holidays), 4:30 am – 11 pm
- Call (800) 834-3792

MIS Access Team

- ARF Submission & Access Issues
- BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov

MIS Support Desk

- BHS_EHRSupport.HHSA@sdcounty.ca.gov



LIVE WELL
SAN DIEGO

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
 - ~~SmartCare Reports Manual~~
 - ~~SmartCare Report Development Tracker~~
 - Additional Trainings

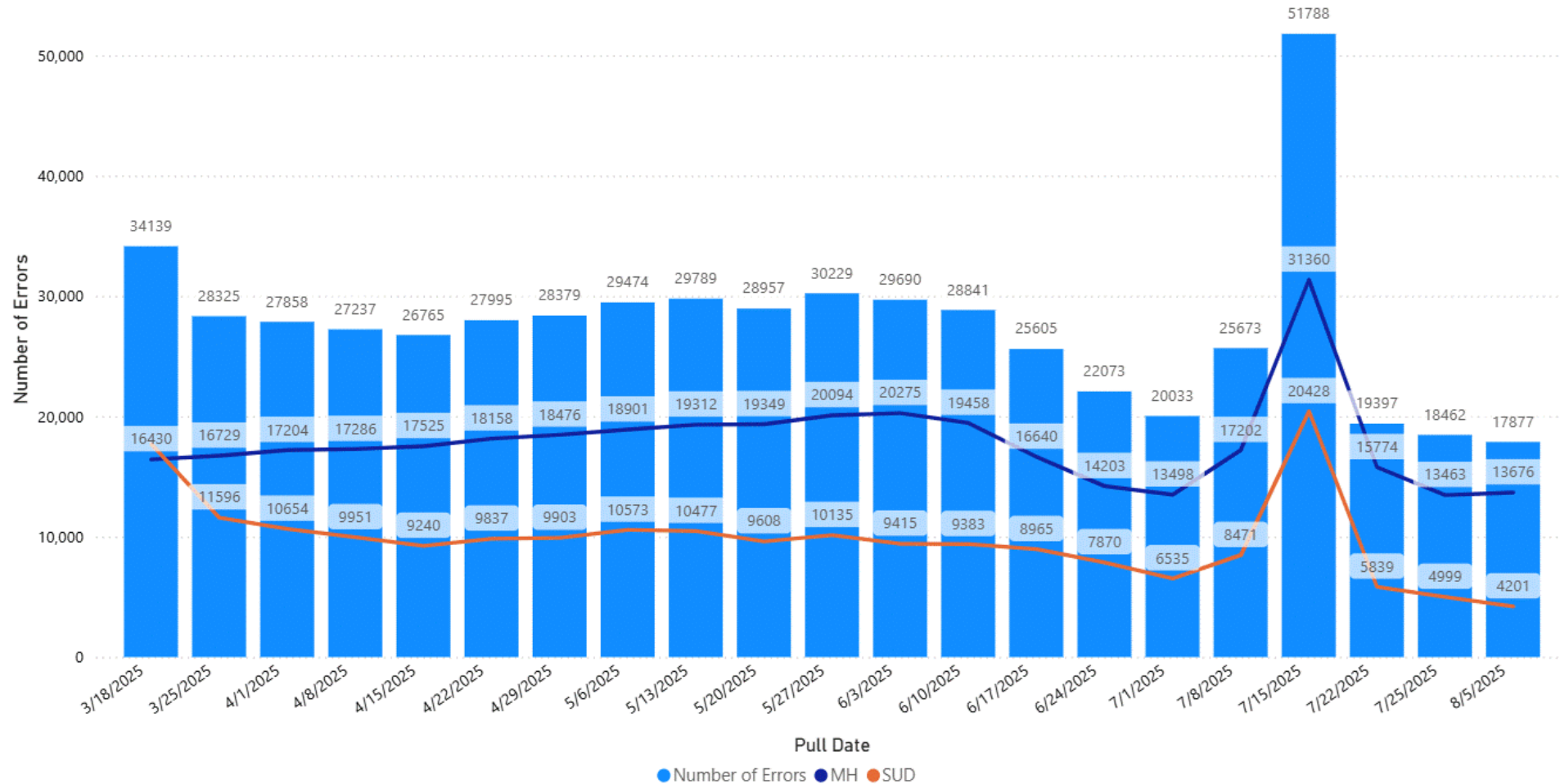


Service Error Data



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Service Errors by Service Area



Reported Errors and Bulk Errors



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25,967

Total Tickets

21,198

All Resolved

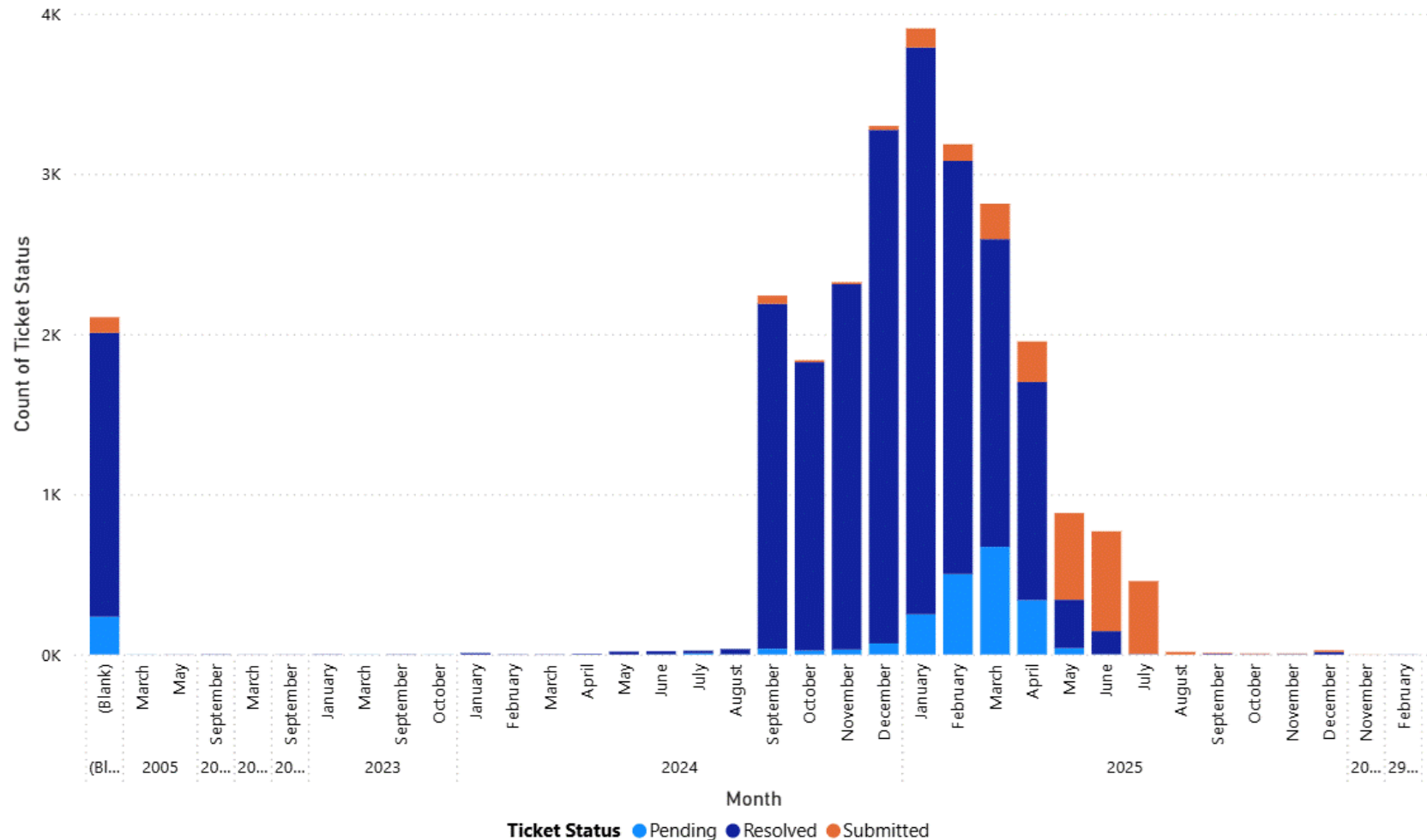
2,552

All Submitted

2,217

All Pending

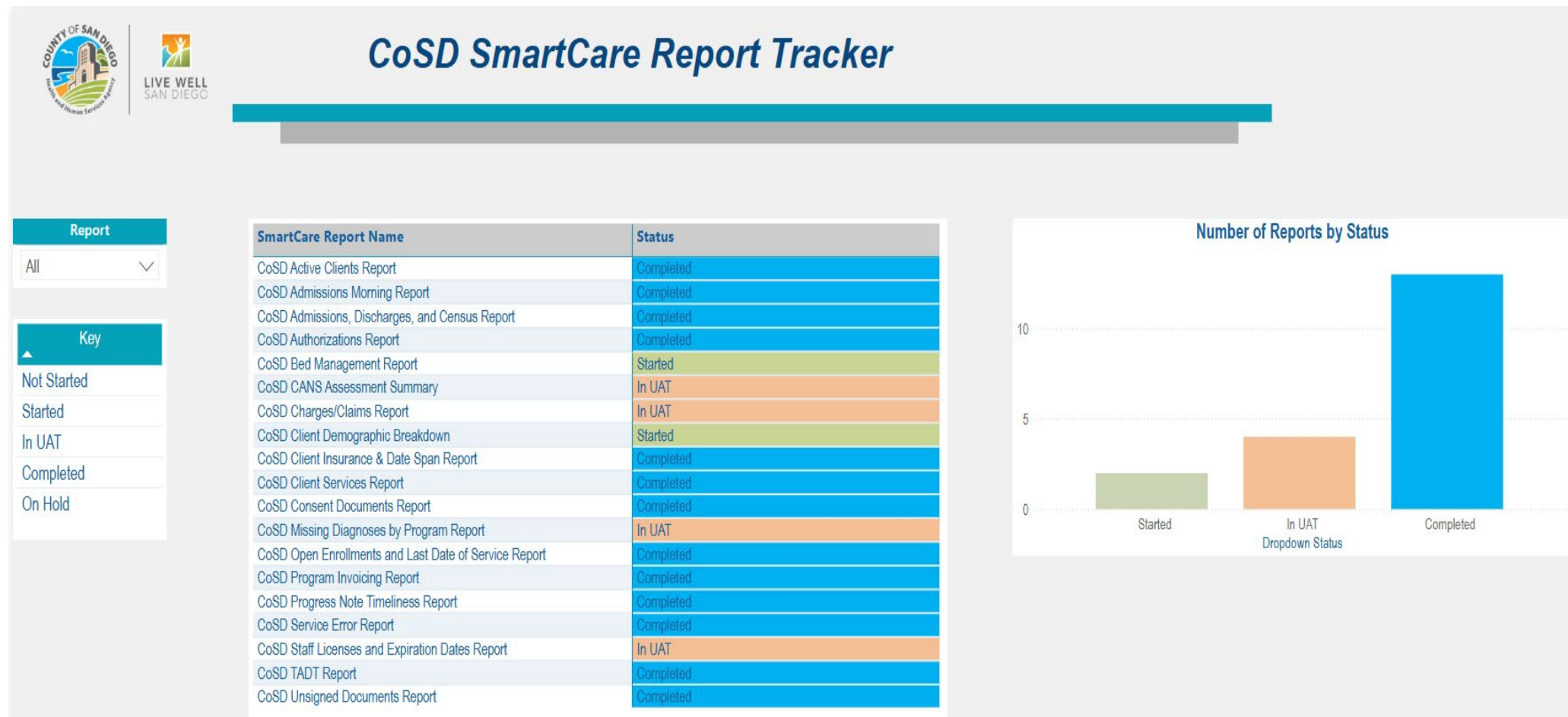
Number of Tickets by Date of Service



CoSD SmartCare Reports



CoSD SmartCare Report Tracker





BHS Billing Announcements/Reminders

Tess Bugay and Carmen Saline

CoSD Service Error Report



- The "From" and "Through" date parameters refers to DOS (Date of Service) not the Run Date so, it is recommended that you always use "09/01/2024" as the "From" date to capture any services you might have entered as part of the error-correction process.
- To meet timely filing deadline (12 months from DOS) with DHCS (Medi-Cal), it is important that you work your service errors by the oldest dates of service first. Services rendered in 09/2024 will need to be submitted to DHCS on/before 09/30/2025.
- When working the "Required Authorization For The Same Program Missing for.....", errors, it is recommended that programs also run the CoSD Authorizations Report.

CoSD Authorizations Report



Service Error Report From 09/01/2024 Through 09/30/2024

Error Message (1)- Required authorization for the same program missing for Medi-Cal MH-9 [redacted] ID

Program	Service ID	Client ID	Date of Service	Units	Procedure	Status	Staff ID	Staff Name	Location
CRF HALCYON CENTER	2757603	123456789	09-02-2024	1	Crisis Residential Day	Show	4000072	BedDay, System	Psychiatric Residential Treatment Center

1 of 1 100115099 Find Next

Auth Doc Id	Client Id	Client Name	Coverage Plan	Auth Code	Auth Status	Auth #	From	To	Requested	Approved	Used	Service Id	Service Status	Procedure	DOS	Clinician
682	123456789	[redacted]	Medi-Cal MH	Crisis Residential	Approved	082824 HA C2 5099	09/01/2024	09/03/2024	3	3	3	750945	Complete	Children-Adult Crisis Residential	09/01/2024	BedDay, System
682	123456789	[redacted]	Medi-Cal MH	Crisis Residential	Approved	082824 HA C2 5099	09/01/2024	09/03/2024	3	3	3	1220403	Complete	Children-Adult Crisis Residential	09/02/2024	BedDay, System
682	123456789	[redacted]	Medi-Cal MH	Crisis Residential	Approved	082824 HA C2 5099	09/01/2024	09/03/2024	3	3	3	764764	Complete	Children-Adult Crisis Residential	09/03/2024	BedDay, System

Service Detail

Service Detail Billing Diagnosis Authorization(s)

Service

Client... [redacted] Status Show Start Date 09/02/2024 Program CRF HALCYON CENTER

Procedure Crisis Residential Day Modifier... Start Time 12:00 AM Service Time 1 Days

Clinician Name BedDay, System End Date

Location Psychiatric Residential Trtmt Attending Arora, Anmol Referring

☒ Client was present (unused) Other Person(s) Present Cancel Reason

Regenerate Charge

ServiceId: 2757603
Created By: BEDASSIGNMENTSERVICESJOB
Created Date: 06/30/2025 1:06 AM
Modified By: SERVICECOMPLETION
Modified Date: 08/06/2025 1:18 AM

CoSD Authorizations Report



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Auth Doc Id	Client Id	Client Name	Coverage Plan	Auth Code	Auth Status	Auth #	From	To	Requested	Approved	Used	Service Id	Service Status	Procedure	DOS	Clinician
1297	234567890		County (MC) MH Administration	Crisis Residential	Approved	091824 VB C3 4032	09/18/2024	09/24/2024	7	7	0		Complete	Crisis Residential	09/24/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	822832	Complete	Children-Adult Crisis Residential	09/25/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	823168	Complete	Children-Adult Crisis Residential	09/26/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	823169	Complete	Children-Adult Crisis Residential	09/27/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	823170	Complete	Children-Adult Crisis Residential	09/28/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	823171	Complete	Children-Adult Crisis Residential	09/29/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	823172	Complete	Children-Adult Crisis Residential	09/30/2024	BedDay, System
1714	234567890		Medi-Cal MH	Crisis Residential	Approved	092424 VB A 2866	09/25/2024	10/01/2024	7	7	7	823173	Complete	Children-Adult Crisis Residential	10/01/2024	BedDay, System

SMHS, DMC & DMC/ODS Service Tables



- FY24-25 and FY25-26 SMHS, DMC & DMC-ODS Service Tables will be available on Optum website before the end of the week.
- Please refer to the Version Changes tab for more information regarding the changes.

Service Table Version	Service Table Revision Date	Description of Changes Made	Effective Date of Change
2.1	November 2024	The following changes were made to previous versions of the Service Table.	Claims with dates of service indicated below are impacted by the change listed on the left.
2.1	11/1/2024	Place of Service 09 (Prison/Correctional Facility) has been added as an allowable place of service to various outpatient procedure codes. For a list of codes, navigate to the Outpatient Service Codes worksheet within this workbook. On the "Allowable Place of Service" column, filter for "09" using the search box. - Place of Service 09 has been removed from 98966, 98967, 98968, 99441, 99442, 99443, and 99451.	July 1, 2023 - Present
2.1	11/1/2024	Various procedure codes were added or deleted from clinical trainee provider types. - Pharmacist Clinical Trainee is no longer an allowable discipline for procedure codes 96366 and 96368. - Medical Student in Clerkship is now an allowable discipline for procedure codes 99221, 99222, 99223, 99238, 99239. - Nurse Practitioner Clinical Trainee, Physician Assistant Clinical Trainee, and Clinical Nurse Specialist Clinical Trainees are now allowable disciplines for 99238, 99239, and 99484. - Pharmacist Clinical Trainee is now an allowable discipline for procedure codes 99366 and 99368. - Licensed Occupational Therapist Clinical Trainee is now an allowable discipline for procedure codes 96110, 96112, and 96113. - Registered Nurse Clinical Trainee is now an allowable discipline for procedure codes 90887 and 99484.	July 1, 2023 - Present
2.1	11/1/2024	Various clinical trainee modifiers have been added or removed from procedure codes. - The HO modifier has been removed from procedure codes 96366 and 96368. - The HP modifier has been added to procedure codes 99238, 99239, and 99484.	July 1, 2023 - Present
<div><div>< > Version Changes</div><div>Outpatient Service Codes</div><div>Day Service Codes</div><div>24-Hour Service Codes</div><div>Monthly Service Codes</div><div>Provider Type Abbreviations</div><div>Place of Service Codes</div><div>Modifiers</div><div>+</div></div>			



Q&A

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

Or go online for more information at: Optumsandiego.com

NEXT MEETING: September 22, 2025 10:00-11:00am