



SmartCare User Group

County of San Diego

Health and Human Services Agency

Behavioral Health Services

October 20, 2025

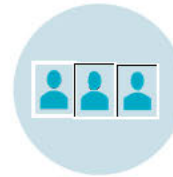
Meeting Goals



Transparency



Engagement



Inclusion

Meeting Agenda



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





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SmartCare User Group: Clinical Updates

Heather Rey
Jill Michalski

Coming Soon!

Batch Service Upload



Coming Soon!

Internal testing has been completed and was successful!

Additional guidance will be forthcoming once Batch Uploading is available in PROD environment for programs.

How to Set-Up Your Signature



[How to Set-Up Your Signature - 2023 CalMHSA](#)

When you sign a document in SmartCare, the signature will look like this:

| | | | | | |
|------------------------------------|--|--|--|--|--|
| Staff: Clinician Staff, MFT | | | | Signature Date: 09/06/2024 12:38PM | |
|------------------------------------|--|--|--|--|--|

How to Set-Up Your Signature



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SmartCare | CalMHSA Smartcare Sandbox | 04-20-2023

Clinician Staff

1

Dashboard

Tracking Widget

Workgroup: All Workgroups | Assigned: Staff, Clinician

Tracking Protocol: All Flags | Tx: All Assigned Roles

| Flags Tracked | Due in 90-61 Days | Due in 60-31 Days | Due in 30 Days or Lt |
|---------------------------|-------------------|-------------------|----------------------|
| CalAIM Assessment Needed | 0 | 0 | 0 |
| CST Standalone Collection | 0 | 0 | 0 |

New Alerts/Messages

| From | Received | Subject | Client |
|-----------------|------------|------------------------------|-------------|
| Staff, Clini... | 02/09/2024 | Work group message test | |
| Staff, Psych | 01/23/2024 | CalAIM Assessment - Tasta... | Smith, John |
| Staff, Access | 08/24/2023 | Are you available today... | |
| Sullivan, Ke... | 08/24/2023 | Generic Note - Test. Clie... | Smith, John |

Assigned Document(s)

| Notes | ISP | Assessment | ALL |
|-------------|-----|------------|-----|
| Due Now | 0 | 0 | 0 |
| In Progress | 11 | 0 | 23 |
| Due in 14 | 0 | 0 | 0 |
| Co-Sign | 0 | 0 | 2 |

CalMHSA AI Documentation

CalMHSA AI Documentation | New Chat

Caseload

| | Current | Not Seen in 3 Mos | Last Year |
|---------|---------|-------------------|-----------|
| Primary | 13 | 13 | 0 |

Services Needing Attention

Total of 'Show' charges: \$ 7291.22

View All

Clinician Staff

2

- My Preferences
- Manage QuickLinks
- Change Navigation Theme
- Keyboard Shortcuts

Appointments

| Client Name/Description | Time | Status |
|-------------------------|------|--------|
|-------------------------|------|--------|

How To Set-Up Your Signature



SmartCare | CalMHSA SmartCare Sandbox | 04-20-2023

My Preferences | Save

5

4

© StreamLine Healthcare Solutions | SmartCare | CalMHSA SmartCare Sandbox | 04-20-2023 | Health Care Organization | 60202206270 | 5.76

| Client Note Level | Flag Color | Flag Annotation | Override Flag Color | Override Flag Annotation | Override |
|-------------------|------------|-----------------|---------------------|--------------------------|----------|
| Information | NA | NA | NA | NA | Override |
| Warning | NA | NA | NA | NA | Override |
| Urgent | NA | NA | NA | NA | Override |

CalMHSA Live Chat Support

A screenshot of the CalMHSA website. The browser address bar shows "https://2023.calmhsa.org". The page features a navigation menu on the left with categories like "Home", "Clinical Documentation", "Substance Use Documentation", etc. At the top right, there are buttons for "CalMHSA Learn (LMS System)", "Help Desk Ticket (Admin)", "Customer Ticket Portal", and "EHR Bulletin". The main content area is titled "WELCOME TO THE EHR Knowledge Base" and contains introductory text and a list of resources. A red arrow points to a live chat icon in the bottom right corner of the page.

← ↻ 🏠 📄 https://2023.calmhsa.org

CalMHSA

California Mental Health Services Authority

CalMHSA Learn (LMS System) | Help Desk Ticket (Admin) | Customer Ticket Portal | EHR Bulletin

Home

- Clinical Documentation
- Substance Use Documentation
- Prescriber Documentation
- Nursing Documentation
- Inpatient Documentation
- CSU Documentation
- Residential Documentation
- CalMHSA Rx
- Front Desk Documentation
- Patient Portal
- Billing Documentation
- RCM Counties
- Accessing Data in SmartCare
- Contract Provider Data Entry Only
- QA/QI and State Reporting
- System Administration Documentation

WELCOME TO THE EHR Knowledge Base

The tools on this website have been designed for all county behavioral health department users of CalMHSA's EHR. Whether you're working with the system to prescribe medication or conduct billing, and whether you're a system administrator or a front desk user, here you'll find:

- Login, Navigation, and Basic Functionality Guides
- At-a-Glance Workflows
- Training Videos
- FAQs
- For a List of New/Updated Articles [click here](#).

Find your space through the navigation at left and begin exploring the site to learn more about using the EHR.

This training guidance was created based on user guidance and feedback from our county partners. To help us ensure it remains relevant to your day-to-day needs, please share your feedback at EHR@calmhsa.org.

First time SmartCare users, [click here](#) for important information.

If you need to reset your password, [click here](#) for instructions.

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CalMHSA Live Chat Support



The screenshot shows the CalMHSA website interface. At the top, there are navigation tabs for "CalMHSA Learn (LMS System)", "Help Desk Ticket (Admin)", "Customer Ticket Portal", and "EHR Bulletin". The main content area features a "WELCOME TO THE EHR Knowledge Base" header. Below this, a paragraph states: "The tools on this website have been designed for all county behavioral health department users of CalMHSA's EHR medication or conduct billing, and whether you're a system administrator or a front desk user, here you'll find:" followed by a bulleted list of resources: "Login, Navigation, and Basic Functionality Guides", "At-a-Glance Workflows", "Training Videos", "FAQs", and "For a List of New/Updated Articles [click here](#)". Further down, it says "Find your space through the navigation at left and begin exploring the site to learn more about using the EHR." and "This training guidance was created based on user guidance and feedback from our county partners. To help us er please share your feedback at EHR@calmhsa.org". It also includes links for "First time SmartCare users" and "password reset".

On the right side, a "CalMHSA Support" chat window is open. It contains the following text: "Please select one of the options below. We are happy to help!", "Live Chat is available Monday through Friday, 8 AM to 5 PM.", and "Choose an option below." Below this text are two buttons: "Talk to Live Agent" and "Submit Support Ticket". At the bottom of the chat window, there is a text input field with the placeholder "Choose an option" and a send button with a paper plane icon. A close button (X) is located at the bottom right of the chat window.

CalMHSA Live Chat Support



Portal EHR Bulletin

CalMHSA Support

Friday, 8 AM to 5 PM.

Choose an option below.

Talk to Live Agent
07:58 AM

CalMHSA Support

Live Chat is available Monday through Friday from 8 AM to 5 PM.
07:58 AM

Please do not share your personal health information and/or Protected Health Information (PHI) over Live Chat.
07:58 AM

Please select the county that you work for:

Select one

07:58 AM

Done

Choose an option

X

The screenshot shows a mobile application interface for CalMHSA Support. At the top, there are tabs for "Portal" and "EHR Bulletin". Below these is a teal header with a back arrow, a CalMHSA Support icon, and the text "CalMHSA Support". The main content area contains several messages: a system message about Friday hours (8 AM to 5 PM), a prompt to "Choose an option below", a teal button labeled "Talk to Live Agent" with a timestamp of 07:58 AM, a CalMHSA Support header, a message about live chat availability (Monday-Friday, 8 AM-5 PM), a privacy notice about PHI, and a form field for selecting a county. The form field is a dropdown menu with "Select one" and a downward arrow. Below the form is a "Done" button. At the bottom, there is a text input field with "Choose an option" and icons for attachments and sharing. A blue circular button with a white "X" is located at the bottom right of the chat window.



SmartCare User Group: MIS

Rebecca Ferry-Rutkoff, Adrian Escamilla

Staff Administration



- Staff should complete required LMS trainings before submitting an ARF.
- The Effective Date on the ARF should be the date of when the change or request should take place.
- Provide the Clinical Trainee type on the comments section of the ARF (e.g., LCSW CT, LMFT CT, LPCC CT).
- A New ARF will be published soon. MIS will accept old forms through November, but starting in December, programs must use the new ARF, or the form will be rejected.
- **Reminder:** Privacy Project is underway to ensure required privacy access and security. Future changes are planned for user accounts and access roles. Some users will see changes in their account set up and access. More info will be shared as dates are finalized.

- FSN system issues continue to occur.
 - A client's admission and discharge must have the same FSN, or the State will reject the record. If the FSN does not match on both documents, please email the MIS Support Team.
 - On a client's discharge, verify the admission date is correct before completing the document, else email the MIS Support Team.
 - The FSN dropdown is blank.
- After corrections are made, please sign all documents. The document must be signed to submit to the State.
- Please send all CalOMS and FSN issues to BHS_EHRsupport.HHSA@sdcounty.ca.gov.

Residential Programs



- All residential clients should be admitted and discharged through the Residential (My Office) screen.
- There are tip sheets available on the Optum website on how to admit clients, transfer LOC, place a client on leave, and how to complete a Billing Code change.
- If any residential corrections are necessary, please reach out to BHS_EHRsupport.HHSA@sdcounty.ca.gov.



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



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



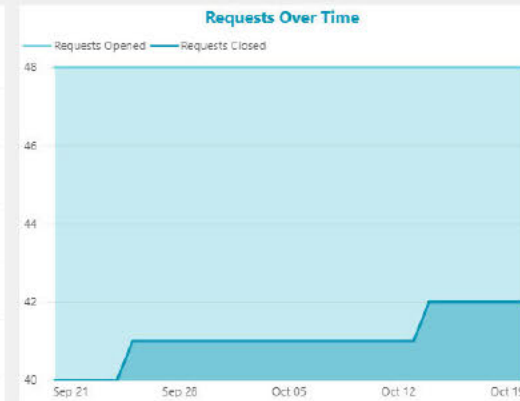
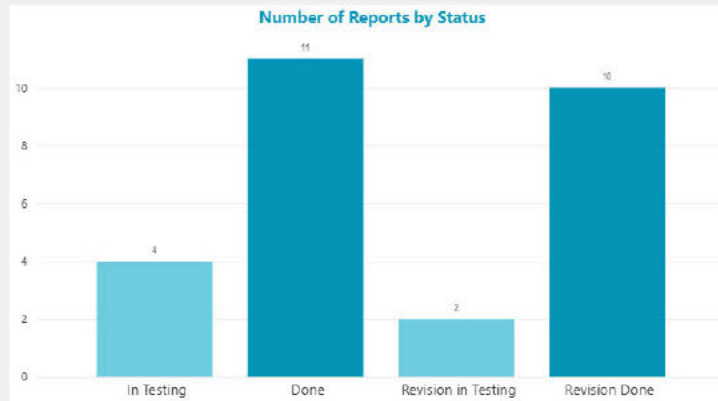
Report Status

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 |



0
New Requests in the Last 30 Days

2
Requests Closed in the last 30 Days

CoSD SmartCare Reports



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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



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BHS Billing Announcements/Reminders

Tess Bugay and Carmen Saline

Billing Timely Filing



1. Services rendered in 10/2024 will need to be submitted to DHCS on/before 10/31/2025.

Please ensure that you enter all your 10/2024 services or move them to show status (if they are Medi-Cal billable) at least a week before 10/31/2025 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.

2. Please continue to review and clear your service errors, prioritizing the oldest dates of service to meet the timely filing deadline (12 months from the date of service).
3. Programs must enter the client address and other components on the Client Information screen. Failure to complete the required fields properly may result in a charge error and prevent the County billing team from batching and billing claims to Medi-Cal.
 - On the General tab, please click the Details button to enter the address.
 - On the Demographics tab, please complete the client's Ethnicity, Gender Identity, Sexual Orientation, and Race.

CoSD Reports



I. CoSD Charges/Claims Report

CoSD Charges/Claims Report

From 9/1/2025 To 9/2/2025

Information contained in the CoSD Charges/Claims report is subject to change at any given time. Some examples of these changes may include but not limited to update in client's coverage plan resulting in charge reallocation to another plan; replacement/rebills of previously denied claims; voidance of errored out services that were already billed to the State.

| Charge Id | Plan | Client Id | Client Name | Service Id | Group Service Id | DOS | Clinician | License | Procedure Name | Service Unit Type | Code + Modifiers | Units | Charge |
|-----------|-------------|-----------|-------------|------------|------------------|----------|-----------|--|---------------------------------|-------------------|------------------|-------|----------|
| | Medi-Cal MH | | | | | 9/2/2025 | | AMFT Associate Marriage and Family Therapist | Assessment LPHA | Minutes | T2024:HL | 8.00 | \$778.64 |
| | Medi-Cal MH | | | | | 9/2/2025 | | MFT Marriage and Family Therapist Clinical Trainee | Family Therapy - client present | Minutes | 90847:AJ | 1.00 | \$324.44 |
| | Medi-Cal MH | | | | | 9/2/2025 | | AMFT Associate Marriage and Family Therapist | Individual Therapy | Minutes | 90837:HL | 1.00 | \$389.33 |
| | Medi-Cal MH | | | | | 9/2/2025 | | APCC Associate Professional Clinical Counselor | TCM/ICC | Minutes | T1017:HL | 2.00 | \$194.66 |
| | Medi-Cal MH | | | | | 9/2/2025 | | APCC Associate Professional Clinical Counselor | Individual Therapy | Minutes | 90832:HL | 1.00 | \$194.67 |
| | Medi-Cal MH | | | | | 9/2/2025 | | AMFT Associate Marriage and Family Therapist | TCM/ICC | Minutes | T1017:SC:HL:HK | 1.00 | \$97.33 |
| | Medi-Cal MH | | | | | 9/2/2025 | | MFT Marriage and Family Therapist | Assessment LPHA | Minutes | T2024 | 7.00 | \$681.31 |
| | 9999 | | | | | 9/2/2025 | | AMFT Associate Marriage and Family | Individual Therapy | Minutes | | | \$292.00 |

II. CoSD Client Insurance and Date Span Report

| Client Id | First Name | Last Name | DOB | Insurance Plan | Insurance Plan Status | Plan COB | Start Date | End Date |
|-----------|------------|-----------|-----|---------------------|-----------------------|----------|------------|------------|
| | | | | CCF | Active | 2 | 01/01/2023 | |
| | | | | CO Admin Services | Active | 1 | 01/01/2023 | |
| | | | | Medi-Cal DMC | Active | 1 | 09/01/2024 | |
| | | | | Medi-Cal MH | Active | 1 | 09/01/2024 | |
| | | | | Medi-Cal DMC | Active | 1 | 02/01/2025 | |
| | | | | Medi-Cal MH | Active | 1 | 02/01/2025 | |
| | | | | Medi-Cal MH | Active | 1 | 06/01/2021 | |
| | | | | Medi-Cal DMC | Active | 1 | 04/11/2019 | |
| | | | | Medi-Cal DMC | Active | 1 | 09/01/2024 | |
| | | | | Medi-Cal MH | Active | 1 | 04/01/2020 | |
| | | | | Medi-Cal MH | Active | 2 | 09/01/2024 | |
| | | | | Medi-Cal DMC | Active | 1 | 09/01/2024 | |
| | | | | MEDICARE PART A & B | Active | 1 | 09/01/2024 | |
| | | | | Medi-Cal MH | Active | 2 | 12/01/2019 | |
| | | | | Medi-Cal DMC | Active | 1 | 09/01/2024 | |
| | | | | MEDICARE PART A & B | Active | 1 | 12/01/2019 | |
| | | | | Medi-Cal MH | Inactive | 1 | 06/01/2023 | 06/30/2025 |
| | | | | Medi-Cal DMC | Inactive | 1 | 08/01/2023 | 06/30/2025 |

III. CoSD Authorizations Report (Residential)

CoSD Authorizations Report



| 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 | Program |
|-------------|------------|-------------|---------------|-------------------------------------|-------------|--------|------------|------------|-----------|----------|------|------------|----------------|-----------------|------------|----------------|------------|
| [REDACTED] | [REDACTED] | [REDACTED] | Medi-Cal DMC | SUD Residential-Residential Bed Day | Approved | | 05/15/2025 | 07/01/2025 | 48 | 48 | 48 | [REDACTED] | Complete | Residential DMC | 05/15/2025 | BedDay, System | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | Medi-Cal DMC | SUD Residential-Residential Bed Day | Approved | | 05/15/2025 | 07/01/2025 | 48 | 48 | 48 | [REDACTED] | Complete | Residential DMC | 05/16/2025 | BedDay, System | [REDACTED] |

Clients with Dual Coverage



BHS Billing Unit

The BHS Billing Unit accepts any of the following documents from the primary insurance to enable us to bill the unpaid balance to Medi-Cal (secondary insurance or payer of last resort).

1. Evidence of Coverage (EOC) indicating that the SUD service is “not covered”. This document may be easier to obtain from the client than billing the insurance.
2. Explanation of Benefits (EOB) or claim denial from the OHC/primary plan after billing the insurance. The EOB must contain denial or non-coverage of the SUD services.
3. If you bill OHC/Medicare and have not received any response or proper EOB after 90 days of the billing date, please submit any acceptable documentation proving that your program has billed the OHC and received no response.
 - Some of the acceptable forms of proof that all sources of payment have been exhausted are as follows: email confirmation from the insurance company, a copy of the claim form with the mailing stamp date, a reference number from a follow-up call, and others.
 - If you receive payment or response from the primary insurance company after Medi-Cal is billed, please contact the BHS Billing Unit (MH or SUD) right away to determine if the Medi-Cal payment needs to be voided and returned to the State.

Clients with Dual Coverage



SUD Billing Unit

- Non-NTP programs are required to bill OHC (Commercial Insurance or Medicare Part C). Please note that some procedures can be billed directly to Medi-Cal as stated on the ODS-DMC Billing Manual version 3.0, section 5.2.30 Other Health Coverage Non-Medicare.
- NTPs are required to bill the Medicare Part B or Medicare Part C first if a client is Medi-Medi. Please ensure that the services are entered in SmartCare when you submit the Medicare EOB to the ADS Billing Unit so we can process the payment application and Medi-Cal billing.

BHS Billing Email Contacts:

SUD Programs: adsbillingunit.hhsa@sdcounty.ca.gov

MH Programs: mhbillingunit.hhsa@sdcounty.ca.gov



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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

NEXT MEETING: Tuesday November 18, 2025 2:00pm – 3:00pm