

# AGENDA



## Electronic Health Record (EHR) SUPT User Forum

**Date:** March 22, 2023

**Time:** 2:00-3:30 PM

**Location:** Virtual using Zoom

**Facilitator:** Melony Ibarra

**Scribe:** Sambo Chhoeung

**Attendees:** (See sign in sheet)

Topic	Presenter	Start Time	Length
<b>Welcome/Introductions</b> <ul style="list-style-type: none"><li>Zoom meeting overview</li><li>Support-Training Registration and Billing Team Mailbox Name Change</li><li>Changes to the Mailbox names will be effective May 1<sup>st</sup>, 2023.</li></ul>	Melony	2:00 PM	5 min
<b>Avatar Claiming/Fiscal Update</b> <ul style="list-style-type: none"><li>Claiming Status – Currently claiming January 2023</li><li>Claims Correction Spreadsheet (CCS) – CCS are currently being completed in timely manner</li><li>Pre-Billing Reports – Reminder for the Address error, please enter HOMELESS in the first address line and enter valid zip code. You can use the zip code of your agency. You can update this using the Update Client Data form in Avatar.</li><li>Guarantor 99999 or the Prebilling Maintenance reports – 3 areas to check: Diagnosis, Financial Eligibility, and Practitioner Registration. For Practitioner Registration please make sure the practitioner classification is up to date.</li><li>Guarantor Order - If a client's eligibility has terminated, please end date it. Do not change the order of the guarantor.</li></ul> <p>Practice Management one-on-one virtual sessions by appointment – Offered the 1<sup>st</sup> Wednesday of the month by appointment or as needed.</p>	Silvia	2:05 PM	10 min

<p><b>ECM Claiming</b></p> <ul style="list-style-type: none"> <li>• Claiming Updates – We submitted October 2022 through January 2023 claims for Managed Care Anthem and are awaiting adjudication.</li> <li>• Entering ECM Guarantors in Financial Eligibility – When entering new managed care guarantors, please remember that all managed plan guarantors will always start with “managed care”. The Order of the guarantors should always be OHC, Medicare, Managed Care Plan, and MH County funds (G20).</li> <li>• Please use the following guarantors when entering guarantors for Managed Care: <ul style="list-style-type: none"> <li>Managed Care-Aetna (601)</li> <li>Managed Care-Anthem (602)</li> <li>Managed Care-HealthNet (603)</li> <li>Managed Care-Molina (604)</li> </ul> </li> <li>• ECM Prebilling Report - Please run your ECM Pre-Billing report frequently. This is a good housekeeping report that helps the claiming process run a lot smoother.</li> </ul>	Mike	2:15 PM	5 min
<p><b>Avatar Maintenance and Support Update</b></p> <ul style="list-style-type: none"> <li>• See Release items</li> </ul>	Justin	2:20 PM	5 min
<p><b>Avatar Reports/Widgets</b></p> <ul style="list-style-type: none"> <li>• See Release Items</li> </ul>	John	2:25 PM	5 min
<p><b>Program Update</b></p> <ul style="list-style-type: none"> <li>• Cal-OMS errors – Reminder to work on CalOMS and complete the CalOMS discharge when patients leave program</li> <li>• CalAIM Contingency Management: SUPT still awaiting go-live announcement date from DHCS -</li> <li>• CalAIM service rates under development – We are working internally regarding the use of the new CPT codes. These service codes will be at a more granular level. There will be new service rates.</li> </ul>	Ed	2:30 PM	10 min
<p><b>CalAIM</b></p> <ul style="list-style-type: none"> <li>• ECM - We sent out an email requesting audit information for Managed Care Plan health net. For ECM providers who have not yet returned this, please do. We will also be sending out a request for success stories.</li> <li>• Open Question Forum continues to go well</li> <li>• ECM Questions: Email <a href="mailto:BHS-ECM@saccounty.gov">BHS-ECM@saccounty.gov</a></li> <li>• CalAIM Questions: Email <a href="mailto:AndersenD@saccounty.gov">AndersenD@saccounty.gov</a> and/or <a href="mailto:MooreDa@saccounty.gov">MooreDa@saccounty.gov</a></li> </ul>	Dana	2:40 PM	10 min
<p><b>Training Updates</b></p> <ul style="list-style-type: none"> <li>• ECM Avatar training - ECM training will be scheduled monthly through the end of May. After that, in preparation for the new EHR, there will not be an ECM training</li> </ul>	Kat	2:50 PM	10 min

scheduled in June. ECM training is still being determined for the new EHR.

- Corrections in EHR Avatar training video - The Corrections in EHR training has now been converted to a recorded video. If staff have completed Practice Management training, they will be sent the link to the training video and quiz when we receive their registration form. Once they pass the quiz, they will need to reach out to the training registration desk to let us know. Once we verify their quiz results, we will then update their user account with those permissions.
- Avatar Training Schedule Updates - The last scheduled Avatar SUPT CWS training will be held April 20<sup>th</sup> and last scheduled Avatar SUPT PM training will be held April 24<sup>th</sup>.
- Starting in May, once we receive training registration forms, we will be emailing the registered staff the class training materials such as the PowerPoint presentation notes, training guides, link to the tip sheets, training videos and quiz. After they have finished reviewing the training material and pass the quiz, they will need to reach out to Avatar Training Registration to receive their user account log in.

In May & June, we will be offering live Avatar Q&A sessions via Zoom with Avatar trainers. CWS Q&A sessions will be scheduled weekly on each Wednesday at 9am. Practice Management Q&A sessions will also be offered throughout May & June. The Practice Management Q&A session will also cover questions regarding Service Request, Scheduler, ECM and Corrections in EHR. All of the Avatar Q&A sessions will be listed on the May & June training schedules.

Starting in May through the end of June, each Wednesday afternoon at 1pm, we will schedule live Order Connect training via Zoom. Staff needing non-prescriber permissions should be registered to attend this training. These trainings will still be offered live so that users can complete their OrderConnect registration with our team.

- Upcoming User Forums - There are now monthly user forums scheduled through July. The schedules are posted to the webpage. At upcoming user forums, we will communicate more updates regarding the training plan for the new EHR, SmartCare. CalMHSA had created informative training videos. Our team is in the process of determining if we still need to supplement those videos with additional training.
- SUPT Service Strategies and locations (Progress Note) – There are selections in the drop down field specific to SUPT in the Additional Service Strategies/EBP in the Progress Note Entry form. Reminder to select options that start with SUPT. The options within the Evidence Based Practices/Service Strategies (CSI) multi select field are specific to Mental Health programs, please do not select one of those options. Please select the appropriate SUPT residential specific locations under the location drop down

when applicable.			
<b>New EHR-SmartCare</b> <ul style="list-style-type: none"> <li>All services provided on July 1<sup>st</sup> and moving forward will have to be documented in Smartcare.</li> </ul>	Kristi	3:00 PM	5 min
<b>SmartCare Demo</b>	Justin	3:05 PM	15 min
<b>Open Forum</b> <ul style="list-style-type: none"> <li>What is the difference between the 2 Problem List reports? – One is by role and one is by program.</li> <li>Once we transition to SmartCare, will we still be able to utilize the input template to upload patient services all at once? Yes, there will be a new template to use for the new system.</li> <li>Will we have an area to enter the note as we do in avatar or is this no longer the case with smartcare? There is a note field. The name of the screen is Services/Notes.</li> <li>For agencies that utilize telehealth services, would face to face time also include sessions held over the phone? – Yes</li> <li>The total duration only shows the face to face time, is there a reason the doc time is not included in this? – With CalAIM payment reform, we are no longer able to bill for documentation or travel time. This is part of the payment reform.</li> <li>Is the expectation that the counselor now add the modifier in? There is not a modifier option on the charge input area. – The modifiers will be added based on how the program is set up and logic specific to the client.</li> <li>How long will the Smartcare training be approximately? – It varies depending on the classification that the staff need since they may need to watch different videos depending on classification.</li> <li>Will all the providers need to re-attend training to get access to Smartcare? – CalMHSA created training videos that we are planning to provide to contracted providers. We are still determining if we need to supplement the training with additional training.</li> <li>Will we get the same permission we get in Avatar? – The screens will be different but providers should have access to everything they need.</li> <li>Will the patient information be transferred over before July? – We are converting all the existing clients and users in the system. We are trying to pull over all the financial information and some of the documentation in Avatar such as the last 5 progress notes, allergies and the last assessment.</li> <li>Is the county going to give flexibility for issues that may arise given not having a choice to delay? – Regarding invoices, yes, we will be working with Program.</li> </ul>	All	3:20 PM	

