Agenda

Electronic Health Record (EHR) MH User Forum

Date: July 31,2025
Time: 1:00 to 2:30 PM
Location: Virtual using Zoom

Facilitator:	Melony Ibarra
Scribe:	Chean Chheng
Attendees:	(See sign in sheet)

Topic	Presenter	Start Time	Length
Welcome/Introductions • Zoom meeting overview • **Agencies attended:** • **APCC** • **Telecare** • **Pacific Clinics** • **Capital Star** • **River Oaks** • **TLCS** • **BACS** • **BHS** • **La Familia** • **MHTC** • **El Hogar** • **POYS** • **Sacramento Children's Home** • **Heartland** • **Sierra Vista** • **SSYAF** • **Turning Point** • **APSS** • **WellSpace** • Avatar contract ended 6/30/25 • Do not use test clients in the live SmartCare environment, reach out to EHR Training Registration team to get access to Training environment for testing. • New Agenda Item for future User Forums: **Provider Topics -** We are providing an opportunity to discuss items that users would like to be brought to attention during our User Forum meetings. Please reach out to us with your items in advance to allow us to prepare material and subject matter experts to discuss the topics. • SmartCare survey: link expires 7/31/25 o Survey from CalMHSA wanting feedback about end user experience using SmartCare.	Melony	1:00 PM	5 min

• Support/Training Registration and Billing Mailbox
   o **Support**: BHS-EHRSupport@saccounty.gov
   o **Training Registration**BHS-EHRTrainingReg@saccounty.gov
   o **Billing** BHS-EHRBilling@saccounty.gov			

Medi-Cal/Medicare Claiming/Fiscal Update • Claiming Status Update through May 2025 (Medi-Cal), currently working on June services. • Please run the Program Denials (SAC) report to view denials and denial codes. • Claims Correction Spreadsheet (CCS) • Medicare update – Completed MediCare claiming through April 2025. • Demonstration - Searching for a client • Tip sheet to avoid creating duplicate CCS: • High volume of merger request lately, and we want to stress the importance of thoroughly searching for the client to avoid duplicates. o If duplicate clients are found, please submit a client merger request form to the Billing Team at BHS-EHRBilling@saccounty.gov.	Lana	1:05 PM	10 min
ECM Claiming • SmartCare Claiming Updates through April 2025 for HealthNet & Anthem and awaiting adjudication. • ECM & (SAC) Reports in SmartCare – Reminder to run reports to identify and address errors. • Ensure you use the client CIN number for insured ID. • Entering ECM Programs – All ECM programs being with ZZ ECM. • Entering ECM Procedure Codes – Begin with ECM and end with the Plan name.	Mike	1:15 PM	5 min
Other Billing/Claiming Items • FY 25-26 Service Tables are available at the DHS library located here: https://www.dhcs.ca.gov/services/MH/Pages/MedCCC-Library.aspx • Prescriber Progress E/M (OP) with Telehealth replacing Prescriber Telephone E/M (OP). • Prescriber Telephone E/M (OP) will no longer be available, effective 07/01/2025.	Richard	1:20 PM	5 min

• Ensure that Telehealth is selected when using Prescriber Progress E/M (OP). Both (Video and Audio) or (Audio only) are accepted.			

SmartCare Support
• **Reminders**
   o Please reach out to us for support questions at BHS-EHRSupport@saccounty.gov
   o Entering Location for Labs
   o Recommended not to use the Web Browser Password Auto fill
   o Notifying EHR Team and QM when staff are terminated
   o Notifying the EHR Team when a program closes
   o Scanning
• **EPCS Certificate Renewals**
   o EPCS prescribers have started to receive renewal notices from IdenTrust.
      • An email was sent out by EHR support to those that have/may receive a notice within the next few months.
      • If there is a renewal email received, please reach out to bhs-ehrsupport@saccounty.gov to let us know and hold on to the email.
      • We will provide a Renewal Voucher for the prescriber to get their certificate renewed
  o **Updates**
    o **Contact Notes**
     ▪ Added 2 new selections to the Reasons dropdown **BHS-Sac 1ˢᵗ Attempt & BHS-SAC 2nd Attempt**
    o **Inquiries Screen-**
     ▪ Added New Referral type **Court**
      o Added new subtypes
     ▪ Added new subtype **CDCR** to **Criminal Justice Referral** type
    o **Special Population-** Added JI Population.
 	
• **Known Issue-** In the Staff Calendar if you reschedule an appointment, it is leaving the original appointment on the calendar and not auto deleting. This is causing a duplicate appointment, the original and the rescheduled appointment.
    • For now, the original appointment needs to be deleted. CalMHSA is working on a fix for this.
 	
• **CalMHSA Updates**
   o **Medication Management Rx screen-** Real Time Med History report now enabled for Non-Prescribers (Nurses)
   o **Staff Calendar-**Service Appointments' that include special characters in the 'Comment' section under the 'Service Detail' screen are now correctly listed in the correct timeframes in the 'Calendar' screen, allowing users to view and edit without any issues.
	Justin	1:25 PM	10 min

o   **Group Notes** screen updated-CalMHSA has updated the Group notes user interface to add more visibility when creating a Group note.
         ▪ Reference the July User Forum updates document
 	
• **Batch Service Entry-** We turned on the validation to verify if the Service you are entering for a staff falls within their license period. If it is not, you will not be allowed to save the service(s)
     o If you have any questions regarding a staff's license, please reach out to DHSQMStaffReg@saccounty.gov for assistance.				

TDAT • CalMHSA Timely Access Document Report o TADT completed for every new enrollment • Psych TDAT should not be completed until the client and clinician agrees that it's the next step and it becomes a request for service.	Dawn	1:35 PM	5 min	
SmartCare Reports • Release Items located at SmartCare Technical Support **New Requests** • **Care Plan Status** – will be looking at the Care Plan Status Report and add a parameter to allow you to run for housing plans. o Requesting report with client housing status at the time of entry into the program and any changes in housing status during or after program completion. • Requesting a report that will show demographics broken down by diagnosis, that could identify the race, ethnicity, gender, age, etc. based on different diagnosis. • Request for reporting updates can be emailed to BHS-EHRSupport@saccounty.gov and must include your contract monitor. **Coming Soon –** ANSA report like the new CANS report released today. • **Service Import Batch Report** requested from SUD User Forum 07.30.2025	John/Val	1:40 PM	10 min	
CalAIM • The next Collaborative Resource Roundtable is on 8/27 Topic - 988/CWRT/BACS – presented by Christina Irizarry • The next ECM Provider meeting is 8/7 at 9:00 A.M. • The next ECM training 8/7 @ 1:00 pm	Darlene	1:45 PM	5 min	

Training Updates
• Training schedules posted through September 2025
• Slide Deck Updates
     o   MH Provider Admin Training 6/09/25
     o   SmartCare MH Provider Administrative Slides
• Tip Sheets
     o   Changing the Author of a Document (TADT)
     o   Changing the Author of a Document Tip Sheet_072125.pdf
	Kat	1:50 PM	10 min	

• Authorized Approver Manual last updated 6/3/25 • Next MH User Forum: Thursday, Sept. 25th at 1pm			
New SmartCare Items or Issue Updates • AB 352 o Using the Special Populations screen, AB352 compliance can be documented using the new special population types below: ▪ AB352-Abortion ▪ AB352-Contraception ▪ AB352-Gender Affirming Care o For more information regarding AB352, see CalMHSA's webpage, https://2023.calmhsa.org/ab-352-compliance-how-to-add-new-indicators-to-a-clients-record-in-special-populations/ • REMINDER: CANS Discharge: Must be completed when clients are discharged from your program • PSC-35 Validation Errors	Kristi	2:00 PM	5 min
Avatar Records Requests o Verify what has already been uploaded into SmartCare. Most clients have Avatar information that was uploaded into SmartCare. Please determine if there is a need beyond what was migrated. This includes the Diagnosis & Movement history information, as our archive does not offer that document. o For formal authorizations and subpoenas we are 30 days in and will be shifting the process pursuant to ease/flow/and review of unexpected variables. o Email document QMinformation@saccounty.gov with your full contact information in the salutation of your email. o Include Name and DOB (very important--- files are not listed by Avatar ID number). Including ID number is fine, but we really need the DOB. o If there are no records available, this will be communicated via email to program directly, who will be responding to the authorization/subpoena. o We will be developing a QM form for general Avatar inquiries/requests for records. Keep in mind that a general Avatar inquiry absent a signed release should be your program information only.	Christine Janes	2:05 PM	5 min
Open Forum • **Question:** Is there a way to add co practitioners to a service? Currently we do not have a way to add additional practitioners due to each having to enter a progress note. **Question**: Is anyone running into issues with adding Problem Lists to your program. The issue is that it adds ALL previous problems from previous programs that the writer did not input themselves. The problem list was meant to be shared across programs, and it is meant for the member, not the program. It remains active for the	All	2:10 PM	20 min

member until the member is no longer at that program, and it should be end dated. • **Question:** Now that the extension deadlines to correct denials are over, does the county have steps for providers about what can be done, or when guidance will be provided? There are no further corrections that can be made once the deadline is reached. Reach out to your contract monitor for additional information. We do not have a cost report anymore and still need guidance from DHCS on how to reconcile with contracted providers.			

July User Forum Updates

Group Notes update

- CalMHSA has updated the **Group notes** user interface to add more visibility when creating a Group note.
- Key areas such as "Group and Staff", "Clients and Service Information" are now organized into separate and clearly defined tabs.

- **Group service details screen:** The **Services** tab has been renamed to **Group** and this will in turn have two sub tabs named:
  - o Group Details tab
  - o Services tab

Group Service Detail
- In the Group Service Details screen, when navigating to the Services tab, the Client section is renamed to "List of Clients" and it displays their Client Service Level information.
- List of Clients section width has been decreased to view the service information section more clearly and to view maximum data without excessive scrolling.
- The Client Name and Client ID are displayed in full, and the client's associated flags are displayed in the next line of the Client Name for better visibility.
- All the existing icons of the List of Clients section are retained without any change.
- The Service Information tab will be displayed on the right side of the Client section, along with the Custom Fields, Billing Diagnosis, Add-on Codes, Warnings and Errors, and Encounter Form tabs.

Batch Service Entry-New Validation for Staff License

Batch Service Entry

⊗ None of Service records were saved. Please check services with exclamation points and correct any validation errors to proceed.

| 07/22/2025 📅 ▼ | xxxxSacCo-APSS-Broadway(34CZK ✓ | Staff Name ◆ | All Procedure Groups ✓ | **Apply Filter** |

Client Preference ☐ M ☐ TU ☐ W ☐ TH ☐ F   ☑ Also Include Complete/Show Services for the day   ☐ Only Show Clients Seen In Last 90 Days

Last Name Begins With   Last Name Begins With... ✓   **Organizational Hierarchy**

Default Values

Staff		Procedure Code	Time In	Time Out	Dur.	Location		Mode Of Delivery	
Staff Name ◆		✓				✓		Mode Of Delivery ✓	☐ Apply Default Values To Below Grid

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location	Comments
➕	⬛	☐ All Clinician ◆	✓	07/22/202 📅▼				✓	
➕	⬛	☐ All Clinician ◆	✓	07/22/202 📅▼				✓	
➕	Test Entry (758277000)	☐ All Clinician ◆	✓	07/22/202 📅▼				✓	
➕		☑ ❗ Miller, Justir ◆	Assessment LPHA ✓	07/22/202 📅▼	8:35 AM	9:05 AM	30	Office ✓	
➕	Test Test (800019073)	☐						✓	

Date of Service must be within the active Staff License period.