

# Agenda



## Electronic Health Record (EHR) MH User Forum

**Date:** January 29, 2026

**Time:** 1:00 to 2:30 PM

**Location:** Virtual using Microsoft Teams

**Facilitator:** Melony Ibarra

**Scribe:** Alona Kozachenko

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

Topic	Presenter	Start Time	Length
<b>Welcome/Introductions</b> <ul style="list-style-type: none"><li>• <b>Agencies attended:</b></li><li>• Paradise Oaks</li><li>• El Hogar</li><li>• BHS-CST</li><li>• BHS CAPS</li><li>• BHS CWRT</li><li>• BHS SacEDAPT</li><li>• BHS JCAT &amp; Collab Courts</li><li>• BACS</li><li>• Telecare</li><li>• Hope Cooperative</li><li>• MHTC</li><li>• Pacific Clinics</li><li>• GLOM</li><li>• TPCP</li><li>• TP FIT/TBS</li><li>• Capital Star</li><li>• HeartLand</li><li>• CRH</li><li>• SSYAF</li><li>• UCD CAARE</li><li>• Turning Point</li><li>• La Familia</li><li>• River Oak</li><li>• APCC</li><li>• Dignity Health</li><li>• Valley Teen Ranch</li><li>• Promesa Behavioral Health</li><li>• Not using test clients in live SmartCare environment</li><li>• AI note takers – we will be removing any AI bots from the meeting.</li><li>• Support/Training Registration and Billing Mailbox<ul style="list-style-type: none"><li>○ <b>Support:</b> <a href="mailto:BHS-EHRsupport@saccounty.gov">BHS-EHRsupport@saccounty.gov</a></li></ul></li></ul>	Melony	1:00 PM	5 min

<ul style="list-style-type: none"> <li>○ <b>Training Registration</b> <a href="mailto:BHS-EHRTrainingReg@saccounty.gov">BHS-EHRTrainingReg@saccounty.gov</a></li> <li>○ <b>Billing</b> <a href="mailto:BHS-EHRBilling@saccounty.gov">BHS-EHRBilling@saccounty.gov</a></li> </ul>			
<p><b>Medi-Cal/Medicare Claiming/Fiscal Update</b></p> <ul style="list-style-type: none"> <li>• Claiming Status Update – completed claims for November 2025 and are currently processing through December 2025 for services ready to be claimed.</li> <li>• Medicare update – completed claiming for December 2025 services for services ready to be claimed.</li> <li>• Denial Report – run Claims Denial Report (My Office) to view the notes based of posted date. This report will show all denials, as well as the denial code.</li> <li>• Claims Correction Spreadsheet (CCS) – completed within 6 weeks from the date submitted.</li> <li>• Tip sheet on how to avoid submitting a duplicate CCS <a href="#">How to Avoid a Duplicate CCS Tip Sheet.pdf</a></li> <li>• Reminders: <ul style="list-style-type: none"> <li>○ DOS: When ending service, use the last date of the month for each client’s coverage. That also applies to Medicare. Use a comment section for any updates to the client’s coverage.</li> <li>○ Addresses: make sure to enter the full street name, city, state, and correct zip code. If a client is homeless, enter “homeless” in the street name box, Sacramento, CA, zip code of your agency. If the address is incorrect, the service won’t be claimed.</li> </ul> </li> </ul>	Lana	1:05 PM	10 min
<p><b>ECM Claiming</b></p> <ul style="list-style-type: none"> <li>• SmartCare Claiming Updates – submitted claims through December 2025 for HealthNet and Anthem, awaiting adjudication.</li> <li>• ECM (SAC) Reports in SmartCare – run these reports to identify and address any potential errors.</li> <li>• Reminder that Sacramento County is no longer providing ECM services as of 12/31/25, but we will continue to claim for previous months. Providers are still able to make corrections to services within 6 months from the service date.</li> </ul>	Mike	1:15 PM	5 min
<p><b>SmartCare Support Reminders</b></p> <ul style="list-style-type: none"> <li>• Please reach out to us for support questions at <a href="mailto:BHS-EHRSupport@saccounty.gov">BHS-EHRSupport@saccounty.gov</a></li> <li>• If you have any SmartCare issues, reach out to our team, and we ask that you do not reach out directly to CalMHSA as each County has different workflows and processes.</li> <li>• Notifying EHR Team and QM when staff are terminated.</li> <li>• Known Issues Listed on Website: <a href="https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx">https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx</a></li> </ul>	Stacey	1:25 PM	10 min

<p><b>Coverage Screen</b></p> <ul style="list-style-type: none"> <li>• Known issue with end dating multiple payors with the same date. The system is not allowing you to put the same end date for multiple payors. <ul style="list-style-type: none"> <li>○ As a workaround, you can end-date each payor one day apart.</li> </ul> </li> <li>• Some providers are still able to end date multiple payors on the same date <ul style="list-style-type: none"> <li>○ If you still have this capability, please reach out to our team, as we haven't been able to do this. We would like to give direction to all providers if there is a way to still do this.</li> </ul> </li> </ul> <p><b>Common Support Questions Demo</b></p> <ul style="list-style-type: none"> <li>• Every couple of months we will be showing a demo on how to troubleshoot and prevent common SmartCare support issues. <ul style="list-style-type: none"> <li>○ Next month we will be showing how to clear errors from your briefcase.</li> <li>○ Reach out to our team if there are any common support items you would like shown.</li> </ul> </li> </ul>			
<p><b>Service Request Screen Demo</b></p> <ul style="list-style-type: none"> <li>• How to create a Service Request.</li> </ul>	Sambo	1:35 PM	10 min
<p><b>SmartCare Reports</b></p> <ul style="list-style-type: none"> <li>• Release Items – see the attached document.</li> </ul>	John	1:45 PM	10 min
<p><b>TADT</b></p> <ul style="list-style-type: none"> <li>• Meeting with CEO and Directors on 1/29/26 to go over any technical issues with TADT and work on improving our numbers.</li> <li>• Ensure you do your due diligence when completing the TADT.</li> <li>• Timeliness data is being reviewed by DHCS, and numbers need to be improved.</li> <li>• Quality Management and Data Analytics teams will start work group meetings with providers to talk through some questions on TADT completion.</li> </ul>	Melony	1:55 PM	5 min
<p><b>Housing Status Tracking updates coming</b></p> <ul style="list-style-type: none"> <li>• There are some new requirements regarding tracking clients' housing status, so there are going to be some updates in SmartCare, most likely on Special Populations screen. Stay tuned for the email blast when we roll out this update with information about requirements for tracking.</li> </ul>	Melony	2:05 PM	5 min
<p><b>Training Updates</b></p> <ul style="list-style-type: none"> <li>• Training schedules posted through March 2026</li> <li>• Training Guide Resources:</li> </ul>	Kat	2:10 PM	10 min

<ul style="list-style-type: none"> <li>○ MH Provider Admin updated (will be posted shortly)</li> <li>○ Service Corrections updated (will be posted shortly)</li> <li>○ <b>Updated</b> Service Authorization Request tip sheet <a href="#">Service Authorization Tip Sheet</a></li> <li>• Training Registration Form <ul style="list-style-type: none"> <li>○ Program Name field – should be as listed in SmartCare</li> </ul> </li> <li>• New Programs must be created in SmartCare prior to registering staff for training.</li> <li>• Next MH User Forum: Thursday, March 26<sup>th</sup> @ 1pm</li> <li>• Calendar for all MH User Forum Meetings is posted here: <a href="#">MH EHR User Forum Master Schedule 2024</a></li> </ul>			
<p><b>New SmartCare Items or Issue Updates</b></p> <ul style="list-style-type: none"> <li>• Outpatient Providers that prescribe medications via SmartCare, will be moving from Medication RX to CalMHSA RX which is tentatively scheduled for April 1st, 2026. We will be sending out a blast that will provide some additional information, including a training opportunity to orientate you with the new CalMHSA RX solution.</li> </ul>	Kristi	2:20 PM	5 min
<p><b>Open Forum</b></p> <ul style="list-style-type: none"> <li>• Welcome Janelle Rozales to the EHR Billing team. She will be primarily working with the SUPT claiming team, but you may see her helping with some MH questions as well.</li> </ul>	All	2:25 PM	5 min

# Program TADT Status (SAC)

Program Type drives the type of TADT pulled (MH, DMC OP or DMC Opiod (for NTPs))

Complete means: **The TADT is Signed**

Days pending flags in yellow if Over 30 days from Enrollment and not in Complete Status

TADT Status parameter defaults to exclude “Complete” records, but the report can be run to include those or for any group combination. Overall TADT Status can be None, Started, Complete or Multiples, it flags yellow if Multiples, and one or more of those should be deleted

Start Date: 6/1/2025    End Date: 6/3/2025    View Report

Programs: [Redacted]    TADT Status: None, Multiples, Started, Complete

1 of 1    Find    Next

**Program TADT Status**

[Redacted] And 3 Other Programs

For Clients Enrolled Between 6/1/2025 and 6/3/2025

Program Name	Client Name	Client Id	Enrolled	Program Type	Overall TADT Status	Days Pending	Is Urgent	First Req	First Offered	First Rendered	First FU Offered	First FU Rendered	Closure Date	Closure Reason
[Redacted]	[Redacted]	[Redacted]	06/02/25	MH OP	None	168								
[Redacted]	[Redacted]	[Redacted]	06/02/25	MH OP	None	168								
[Redacted]	[Redacted]	[Redacted]	06/02/25	MH OP	None	168								
[Redacted]	[Redacted]	[Redacted]	06/02/25	MH OP	None	168								
[Redacted]	[Redacted]	[Redacted]	06/03/25	MH OP	Started	167		05/29/25	06/10/25	06/10/25	06/23/25	07/09/25		
[Redacted]	[Redacted]	[Redacted]	06/03/25	MH OP	Multiples			05/13/25	05/22/25	05/22/25	06/03/25	06/11/25		
[Redacted]	[Redacted]	[Redacted]	06/02/25	MH OP	Started	168		06/02/25	06/05/25	06/05/25	06/12/25	06/12/25		
[Redacted]	[Redacted]	[Redacted]	06/03/25	MH OP	Started	167		05/13/25	06/03/25	06/03/25	06/03/25	06/26/25		
[Redacted]	[Redacted]	[Redacted]	06/02/25	MH OP	Started	168		05/15/25	05/30/25	06/05/25	06/12/25	06/12/25		
ZZ_A	[Redacted]	[Redacted]	06/03/25	DMC OP	Complete			06/02/25	06/03/25	06/03/25			06/03/25	Other
ZZ_A	[Redacted]	[Redacted]	06/03/25	DMC OP	Complete			06/02/25	06/03/25	06/03/25			06/03/25	Other
ZZ_T	[Redacted]	[Redacted]	06/02/25	DMC Opiod	Started	168		06/02/25	06/02/25	06/02/25	06/03/25	06/03/25		
ZZ_T	[Redacted]	[Redacted]	06/02/25	DMC Opiod	Started	168		06/02/25	06/02/25	06/02/25	06/03/25	06/03/25		

If the inquiry was flagged as “Urgent” that shows in the Is Urgent column

”

s ing	Is Urgent	Firs
4	Y	06/
3		06/

## Program Assessments Due (SAC)

Added the ability to include a specific "Team" Type. Report will show all staff in that role for the client

Programs [REDACTED] Team Role Clinician/Therapist

# Program Assessments Due

Program Name	Client Name	Client Id	Age	Enrolled	Clinician/Therapist	ASAM Status	Cal AIM Status
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14	G	N/A	Done: 2024-08-16
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14		N/A	Done: 2024-09-03
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14	G	N/A	Done: 2023-09-28
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14		N/A	Done: 2023-09-07
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14		N/A	Done: 2025-12-16
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14	E	N/A	Done: 2024-07-25
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14		N/A	LATE: 2023-11-12
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14	G	N/A	LATE: 2023-11-12
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14	G	N/A	Done: 2024-08-15
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14		N/A	Done: 2025-09-17
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	2023-08-14		N/A	LATE: 2023-11-12

## Program Next Appointments (SAC)

**NEW**- Clients currently enrolled in the selected program with their Last date of service and their next scheduled appointment

Programs  ▼

# Program Next Appointments

Clients currently enrolled in

Client Name	Client ID	Enrolled	Last Service	Next Appt	Next Appt Provider
		04/18/25	12/29/25		
		09/05/25	01/02/26	01/30/26	
		01/23/26	01/23/26	02/09/26	
		09/16/25	01/16/26		
		01/21/26	01/21/26	01/30/26	
		10/24/25	10/29/25		
		12/17/25	01/16/26		
		01/14/26	01/23/26	01/28/26	
		03/13/25	12/10/25		
		12/10/25	01/21/26	01/28/26	
		06/30/25	01/23/26	02/09/26	
		06/24/25	01/23/26	01/28/26	

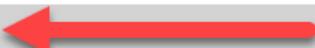
## EBP Counts by Program (SAC)

Added a Details section that defaults to hidden, but can be expanded by clicking on the +

# EBP Counts by Program

For Services Between 7/1/2025 and 10/31/2025

Services	2025				Total
	Jul	Aug	Sep	Oct	
[REDACTED]	67	42	46	49	204
Medication Management	51	31	42	45	169
Unknown Evidence-Based Practice/Service Strategy	16	11	4	4	35
<b>Total</b>	<b>67</b>	<b>42</b>	<b>46</b>	<b>49</b>	<b>204</b>
Distinct Clients	2025				Total
	Jul	Aug	Sep	Oct	
[REDACTED]	56	38	40	45	81
Medication Management	45	30	38	41	59
Unknown Evidence-Based Practice/Service Strategy	16	10	4	4	29
<b>Total</b>	<b>56</b>	<b>38</b>	<b>40</b>	<b>45</b>	<b>81</b>

 [+ Show Details](#)

Show Details

Client Name	Client ID	DOS	Program Name	EBP
		07/30/25		Medication Management
		08/27/25		Medication Management
		10/01/25		Medication Management
		08/04/25		Unknown Evidence-Based Practice/Service Strategy

## Suggestions?

### *Census Summary*

- Show total counts by program
- Any other breakdowns?
  - Currently Sex, Race, Primary Language, Age

### *Service Request*

- Not “CDAG” like most documents
- Client is open to a program you serve
- Information to see?