

# Agenda



## Electronic Health Record (EHR) MH User Forum

**Date:** June 22, 2023

**Time:** 1:00 to 2:30 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 Mailbox Name Change<ul style="list-style-type: none"><li><b>Support:</b> <a href="mailto:Avatar@saccounty.gov">Avatar@saccounty.gov</a> will be changed to: <a href="mailto:BHS-EHRSupport@saccounty.gov">BHS-EHRSupport@saccounty.gov</a></li><li><b>Training Registration:</b> <a href="mailto:AvatarTrainingRegistration@saccounty.gov">AvatarTrainingRegistration@saccounty.gov</a> will be changed to: <a href="mailto:BHS-EHRTrainingReg@saccounty.gov">BHS-EHRTrainingReg@saccounty.gov</a></li><li><b>Billing:</b> <a href="mailto:Avatar-Fiscal@saccounty.gov">Avatar-Fiscal@saccounty.gov</a> will be changed to <a href="mailto:BHS-EHRBilling@saccounty.gov">BHS-EHRBilling@saccounty.gov</a></li></ul></li></ul>	Melony	1:00 PM	5 min
<b>Avatar Claiming/Fiscal Update</b> <ul style="list-style-type: none"><li>Claiming Status Update – We are finishing up claiming for March 2023 services.</li><li>Claims Correction Spreadsheet (CCS) - CCS are currently being completed within 4-6 weeks from the date submitted.</li><li>Medicare update – We have completed claiming for May 2023 services.</li><li>Rate updates – Rates are current. If your reports are showing zero dollars, please reach out to your contract monitor.</li><li>Denial Reports – Please run your Phase II reports client and program, Manual Posting by Program report and the Client Ledger Sac to work denials.</li><li>Pre-Billing Maintenance – Reminder to run your Pre-Billing maintenance Report</li></ul>	Lana	1:05 PM	10 min

<p><b>ECM Claiming</b></p> <ul style="list-style-type: none"> <li>• Claiming Updates- We submitted claims through April 2023 for Healthnet and Anthem and are awaiting adjudication.</li> <li>• Diagnosis Issues - Please make that your diagnosis date is the day of or before the first date of service. Please also make sure to use a valid diagnosis such as one of the Z codes listed in the ICD-10 list.</li> <li>• Run your ECM Pre Billing Reports Frequently</li> </ul>	Mike	1:15 PM	10 min
<p><b>CaAIM</b></p> <ul style="list-style-type: none"> <li>• ECM <ul style="list-style-type: none"> <li>○ We are currently revamping the Program ECM training for Smartcare. Be on the lookout for training schedule</li> <li>○ The MH ECM Provider meeting will be used for ECM SmartCare training.</li> <li>○ MH ECM Provider Meeting: June 23, 2023 at 9:00am <a href="https://www.zoomgov.com/j/1611849695?pwd=U3NLb1k2YjFtRzIPNjh6SnczU1hoUT09">https://www.zoomgov.com/j/1611849695?pwd=U3NLb1k2YjFtRzIPNjh6SnczU1hoUT09</a></li> </ul> </li> <li>• Open Question Forum ECM Questions: Email <a href="mailto:BHS-ECM@saccounty.gov">BHS-ECM@saccounty.gov</a></li> <li>• CaAIM 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	1:25 PM	5 min
<p><b>Training Updates</b></p> <ul style="list-style-type: none"> <li>• Training schedule posted through July - There are Provider Admin staff live zoom trainings and an ECM provider training scheduled for new staff. There are also several SmartCare Q&amp;A sessions scheduled post Go LIVE. We've scheduled some live SmartCare trainings for new ECM providers, Admin staff, Access team staff, and SOC staff. These specific new staff will be required to take these live zoom trainings in addition to the CalMHSA LMS training videos.</li> <li>• SmartCare Training Registration Process (new staff) - When registering direct care staff for training, please email the first page of EHR the training registration form to QM staff registration at <a href="mailto:dhsqmstaffreg@saccounty.gov">dhsqmstaffreg@saccounty.gov</a> along with the staff registration packet required by QM. If you're registering admin/billing staff, or only requesting to modify a user's account without changing direct care staff classifications, please just send the first page of the EHR training registration form directly to EHR training registration at <a href="mailto:BHS-EHRTrainingReg@saccounty.gov">BHS-EHRTrainingReg@saccounty.gov</a>. Once all staff and training registration forms have been emailed, please allow up to 5 business days for a new user's account to be created. A confirmation email will be sent to the user, as well as the authorized approver, once the user account is updated or when the user is registered for training. Information regarding the CalMHSA LMS training videos will also be included in the email.</li> </ul>	Kat	1:30 PM	10 min

<ul style="list-style-type: none"> <li>• SmartCare Login Tip Sheet - The SmartCare log-in tip sheet will be posted on July 1st. It will be a step-by-step guide on how to log into the new EHR.</li> <li>• Avatar to SmartCare Crosswalk - We have also created a crosswalk of forms in Avatar to Screen names used to perform similar functions in SmartCare. This is posted to the webpage.</li> <li>• Upcoming User Forums - The next MH user forum will be held on July 27th at 1pm.</li> </ul>			
<p><b>New EHR-SmartCare</b></p> <ul style="list-style-type: none"> <li>• GoLive is July 1<sup>st</sup> – All services entered provided as of July 1<sup>st</sup> will need to be entered into SmartCare.</li> <li>• Dead Period - This dead period will begin June 26<sup>th</sup> at 5pm and will continue until June 30<sup>th</sup> at 5pm. All new clients and non-clinical documentation done in Avatar will need to be entered into SmartCare after the July 1<sup>st</sup> date.</li> <li>• Any services provided on or before 6/30 should only be entered into Avatar. And any services Provided on or after 7/1 should only be entered into SmartCare.</li> </ul>	Kristi	1:40 PM	5 min
<p><b>SmartCare</b></p> <ul style="list-style-type: none"> <li>• EPCS – We reached out individually and to all the Authorized Approvers to make sure that these users are also getting set up for SmartCare EPCS. As of today, we only have 1/3 of the prescribers complete the process. Please have your prescribers reach out to our team to complete this process. We also need to collect the DEA information for all prescribers. Please reach out to our team if your prescribers have not completed this information.</li> <li>• Support – We will be providing support on Saturday and Sunday July 1<sup>st</sup> -July 2<sup>nd</sup> from 8am -3pm. Through the rest of the week, we will be having our normal office hours from 8am – 5pm. We are still discussing whether our team will be providing support on July 4<sup>th</sup>.</li> </ul>	Justin	1:45 PM	5 min
<p><b>SmartCare Q&amp;A</b></p> <ul style="list-style-type: none"> <li>• Will the student application form stay the same? – For the QM staff reg application, it will be a bit different. We are still working on the classifications in SmartCare and how they crosswalk to our current classifications.</li> <li>• Where will providers with their own EHR enter the services in SmartCare? What will substitute the Client Charge Input tool? Service Entry</li> <li>• With CDAG - will we be able to see the other agencies information once the client is discharged or will we at least see their discharge date? - CDAG is</li> </ul>	All	1:50 PM	40 min

<p>not impacted by discharge.</p> <ul style="list-style-type: none"><li>• What does PATID stand for? - Patient ID</li><li>• When a note is entered by clinical staff, it will produce a service, correct? – Yes, if they enter their service in SmartCare, that will create a service and a charge.</li></ul>			
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