Agenda

Electronic Health Record (EHR) MH User Forum

Date: March 27,2025
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:**
  o **Capital Star**
  o **Telecare**
  o **TPCP**
  o **APCC**
  o **Paradise Oaks**
  o **Pacific Clinics**
  o **El Hogar**
  o **BACS**
  o **Hope Coop**
  o **UCD**
  o **APSS**
  o **CAPS**
  o **MHTC**
  o **Sac Childrens Home**
  o **Heartland**
  o **River Oak**
  o **CST**
  o **Dignity**
  o **La Familia**
  o **HEART**
  o **El Hogar**
 	
• Avatar contract ending 6/30/25. Please make arrangements if there is information that still needs to be pulled from Avatar.
  o Any services that are in Avatar are too late to correct and no corrections should be made.
• Do not use test clients in live SmartCare environment.
  o If testing is needed, please reach out to the Training Registration Team and they can create an account for you in the training environment which has test clients within.
	Melony	1:00 PM	5 min

• New Agenda Item for future User Forums: **Provider Topics** (we would like people to send us topics that you would like to discuss and allow us time to prepare the material for a discussion and/or demonstration on the topic).
• Support/Training Registration and Billing Mailbox
    ○ **Support**: BHS-EHRSupport@saccounty.gov
    ○ **Training Registration**BHS-EHRTrainingReg@saccounty.gov
    ○ **Billing** BHS-EHRBilling@saccounty.gov			

Medi-Cal/Medicare Claiming/Fiscal Update • Reminder - How to Avoid Submitting a Duplicate CCS tip sheet to avoid duplicate CCS, which is located on the BHS-EHR website under the claiming tab. • Claiming Status Update - have claimed MediCal services through December 2024 that were ready to be claimed. • Medicare update - Have completed Medicare claiming for January 2025 services that were ready to be claimed. • Denial Reports - Please run your Program Denial Sac My Office report to view denials based on posted date. This report will show all denials as well as denial and remark codes. • Claims Correction Spreadsheet (CCS) - Currently being completed 8 weeks after date submitted. Please allow us time to process these as they require extensive research. • Voids – Only used for approved services, not denied services. • –If a payor expires use the last date of the month that client had coverage, and that also applies to Medicare. • Address Errors - Please review client information screen and ensure to add the addresses to each box, and do not copy and paste the address. Click on Details and add address information. If a client is homeless, add all caps HOMELESS, with your agency's city/state/zip. Ensure the address dropdown is set to Home. • Pseudo number - The system will not allow adding pseudo on Client Information screen, so you will add 999-99-9999. Navigate to Custom Fields page and add Pseudo SSN there and SAVE.	Lana	1:05 PM	10 min
ECM Claiming • SmartCare Claiming Updates – Claims have been submitted through December 2024 for Healthnet and Anthem. • Make sure to run your ECM & (SAC) Reports on SmartCare regularly, which will help find and clear errors. • Please make sure to enter managed care plans and not MediCal plans when entering ECM services in SmartCare. • Entering Managed Care Payors- All ECM Payors will have "Managed Care" in the name, be sure to use those Payors.	Mike	1:15 PM	10 min

• All Mental Health ECM programs will begin with ECM. • Please ensure to enter the correct ECM Procedure Codes. The procedure name will always begin with ECM and end with the plan name.			
Other Billing/Claiming Items • Moving forward, providers can start using the Prescriber Telephone E/M Procedure again that was originally discontinued as of 1/1/25. If your staff have already used the Psychosocial Rehab- Individual procedure that was previously mentioned that is ok because it's still cross walked to the correct CPT/HCPCs code. The Prescriber Telephone E/M procedure is crosswalked to the Psych Med Note that prescribers use.	Richard	1:25 PM	5 min

SmartCare Support
• **Reminders**
  ○ Please reach out to us for support questions at BHS-EHRSupport@saccounty.gov
  ○ **Lab Exchange Request Interface** – ensure to enter a location for every lab order. CalMHSA added a red required field. If a location is not entered, it is automatically defaulted to the APPS clinic, and they end up receiving the results and the bills.
  ○ **Removing Auto-filled Passwords from your Web Browser Tip Sheet** – A tool we created on our support page under technical support for SmartCare is a tip sheet to remove autofill passwords from your web browser.
  ○ **Notifying the EHR Team and QM when staff are terminated-** This will ensure that we have removed their permissions and access to SmartCare, and we are no longer including them in State reporting if applicable.
  ○ **Notifying the EHR Team when a program closes -** Please notify the EHR team and your contract monitor when a program closes. We want to make sure that we have accurate reporting.
 	
• **UMDAP Financial Assessment "See Release Items"**
  ○ Added new values to the Adjusted Reasons menu: **No Income, Low Income, Unexpected Expenses**
• **Contact Notes "See Release Items"**
  ○ Added **Closed Loop with MCP** to the Contact Reasons dropdown
• **EPCS Certificate Renewals**
  ○ 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 6 months.
    ▪ If there is a renewal email received, please reach out to bhs-
	Justin	1:30 PM	10 min

ehrsupport@saccounty.gov to let us know and hold on to the email. ▪ We are currently working on getting renewal vouchers and will send those out to those that have let us know as soon as possible. ▪ Ensure that when you received renewal email from IdenTrust that you do not click on "get started", because it will prompt you to pay. Please save that email and let EHR Support know so that we can note and prepare vouchers to send out.			
Closed Loop Referral Demo • When a client receiving services from the Managed Care Plan (MCP) needs a step up in services, the MCP can request services from BHS SAC. Once the client is fully linked to the program, the provider will then notify the MCP outside of SmartCare and close this loop in communications. This communication will need to be documented on the Contact Notes (My Office) screen. When a client needs a step down in services to the MCP, the provider will also need to close this loop in communications. They will need to complete the Transition of Care (CalMHSA), send that to MCP, and then discharge the client. • Demo: Contact Notes (My Office) • Demo: Transition of Care (CalMHSA)	Sambo	1:40 PM	10 min
SmartCare Reports • Release Items can be found on the BHS EHR Support page, https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Support.aspx	John/Val	1:50 PM	10 min
CalAIM • The next Collaborative Resource Roundtable is on 4/23/25: Fentanyl Awareness. • The next ECM Provider meeting is 4/3/25 at 9:00 A.M. We will have a special presentation from a Community Support medically tailored meals provider: Foodom. Please see their attached flyer • The next ECM training 4/3/25 @ 1:00 pm	Darlene	2:00 PM	5 min
Training Updates • Training schedules posted through May 2025 • Training Registration Form o Program Name Field – Make sure to list out the specific programs staff will need access to as the name is shown in SmartCare. If they need access to all programs within your legal entity, you can enter "All programs". The programs listed should only be programs the staff will be documenting into. They will have access to view all programs within your legal entity.	Kat	2:05 PM	10 min

○ Closed Loop Referral Tip Sheet https://dhs.saccounty.gov/BHS/BHS-EHR/Documents/Closed%20Loop%20Referrals%20Tip%20Sheet.pdf#search=closed%20loop%20referral - Slide decks updated ○ Separate for MH & SUPT Provider Admin ○ Service Corrections - We will be Implementing changes to Live Training due to feedback received. We would like attendees to join in the training on camera and set that as an expectation. - Next User Forum: Thursday, May 29th at 1pm			
New SmartCare Items or Issue Updates - CalMHSA Connex-Interoperability Solution - CalMHSA Connex-Interoperability Solution - CalMHSA Connex will enhance care coordination by allowing providers a timely and comprehensive insight into the patient's health history. The platform is designed for seamless and secure sharing of behavioral health information among diverse healthcare entities. Connex enables the confidential transmission of patient records, treatment plans, and outcomes across the behavioral health spectrum and ensures sensitive information is shared only with authorized individuals. -We do not have a Go Live date for this tool AB 352 is a California law that adopts protections for sharing information about gender affirming care, abortion, abortion-related services, and contraceptives. The system will use the following indicators to ensure that the sensitive data types outlined below are not shared out of the state. ○ In SmartCare use one of the three special population types from the dropdown menu: ▪ AB352-Abortion ▪ AB352-Contraception ▪ AB352- Gender Affirming Care 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/ - Service Note Reviewer Screen – There is a new screen available to review progress notes. This is a client-based screen that allows users to view all service notes for a specific client with filters available to choose by program(s), previous number of days, procedure codes and the status of the note. - CANS Validation Issue – This has been resolved. If you receive any further CANS validation errors, please reach out to BHS-EHRSupport@Saccounty.gov.	Kristi	2:15 PM	5 min

Open Forum	All	2:20 PM	10 min
- Moving forward we will have a section on Provider Topics for User Forum meetings. Topic suggestions can be sent to EHR Support email. **Question: Completing a record request to QM Information after July 1st for Avatar records, is there a specific record request template?** Answer: Client Request Form, Provider Request Form, Provider to Third Party form. **Question: Since Avatar access is ending June 30, 2025. Regarding medical record requests, the most common request is from Social Security; how does that work with the request forms mentioned.** Answer: Provide any records from your agency that are within SmartCare, then forward the request to QMInformation.gov and leave a note about what portions are completed. QM will then take care of Avatar portion and upload directly to SSA portal. SmartCare records will be taken care of by you. **Question: With the update to the UMDAP screen in SmartCare, will the UMDAP forms on the County forms website be updated to reflect the update?** Answer: EHR will work with QM to get that information updated.			