

# AGENDA



## Electronic Health Record (EHR) SUPT User Forum

**Date:** November 29, 2023

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

**Location:** Virtual using Zoom

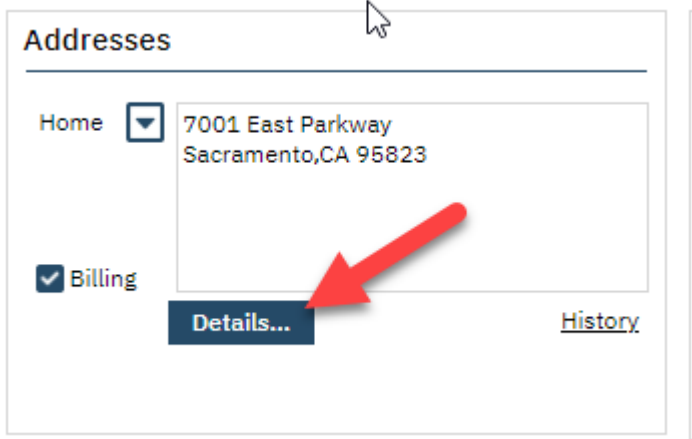
**Facilitator:** Melony Ibarra

**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>• <b>Agencies attended:</b><ul style="list-style-type: none"><li>○ Treatment Associates</li><li>○ Progress House</li><li>○ Associated Rehab</li><li>○ SSYAF</li><li>○ BayMark</li><li>○ River City Recovery</li><li>○ Yolo Wayfarer Center/Walter's House</li><li>○ Bridges</li><li>○ ACAC</li><li>○ Wellspace</li><li>○ Sacramento Recovery House</li><li>○ MedMark</li><li>○ Aegis</li></ul></li><li>• Support/Training Registration and Billing Mailboxes<ul style="list-style-type: none"><li>○ <b>Support:</b> <a href="mailto:BHS-EHRsupport@saccounty.gov">BHS-EHRsupport@saccounty.gov</a></li><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></li></ul>	Melony	2:00 PM	5 min
<b>Avatar Claiming/Fiscal Update</b> <ul style="list-style-type: none"><li>• Claiming Status – Completed June 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</li></ul>	Richard	2:05 PM	10 min

<p>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</p> <ul style="list-style-type: none"> <li>Practice Management one-on-one virtual sessions by appointment - Offered the 1<sup>st</sup> Wednesday of the month by appointment or as needed</li> </ul>			
<p><b>ECM Claiming Update</b></p> <ul style="list-style-type: none"> <li>SmartCare Claiming Updates – We submitted claims through October 2023 for Healthnet and are awaiting adjudication.</li> <li>(SAC) Reports in SmartCare – <ul style="list-style-type: none"> <li>ECM and Outreach Counts – This will show you how many times your program has performed or attempted an ECM or ECM outreach service to a client.</li> <li>Program Coverage Report (SAC) – This report shows the date that the client was enrolled and the coverage the client has or had during that date range.</li> <li>Service Diagnosis Error (SAC) – This report will show you errors that are related to the diagnosis, discrepancies with the diagnosis, or if the client is missing a diagnosis.</li> </ul> </li> <li>Reminder to run your ECM Pre Billing Reports in Avatar for PY Services</li> </ul>	Mike	2:15 PM	5 min
<p><b>SmartCare Medi-Cal Claiming</b></p> <ul style="list-style-type: none"> <li>We are currently wrapping up July 2023 claims</li> <li>NOMINs - NOMINs was created to help identify services that did not meet the minimum duration requirement. If you are seeing the NOMINs on the Contractor Provider Charges Export report, please check the duration of the service to make sure that it met the threshold by using the procedure manual from QM to compare the duration requirements.</li> <li>Billing email – Please email the billing team address at <a href="mailto:BHS-EHRBilling@saccounty.gov">BHS-EHRBilling@saccounty.gov</a> for any corrections where charges need to be regenerated.</li> </ul>	Richard	2:20 PM	10 min
<p><b>SmartCare Support</b></p> <ul style="list-style-type: none"> <li>Please reach out to us for questions regarding functionality of SmartCare at <a href="mailto:BHS-EHRSupport@saccounty.gov">BHS-EHRSupport@saccounty.gov</a> or 916-876-5806.</li> <li>File Import – We completed uploads for October 2023 services. We are about ready to start November services.</li> </ul> <p><b>SmartCare Support</b></p> <ul style="list-style-type: none"> <li>Please reach out to us for questions regarding functionality of SmartCare at <a href="mailto:BHS-EHRSupport@saccounty.gov">BHS-EHRSupport@saccounty.gov</a> or 916-876-5806</li> </ul>	Justin	2:30 PM	10 min

<ul style="list-style-type: none"> <li>• File Import – We completed uploads for October 2023 services. We are about ready to start November services.</li> <li>• Client Information Screen-Address – Please review the client information screen to make sure that the addresses are formatted properly. If changes need to happen click in the Details to make them. If you don't update the address this way it will cause errors in billing.</li> </ul> 			
<p><b>SmartCare Reports</b></p> <ul style="list-style-type: none"> <li>• See Release Items</li> <li>• UPDATE: new report has been released based on feedback from users. The name is <b>Program Staff Services Export (SAC)</b> used to export to excel to see the services provided by program and staff. <ul style="list-style-type: none"> <li>○ See attached document with report parameters</li> </ul> </li> </ul>	Val & John	2:40 PM	10 min
<p><b>CalAIM</b></p> <ul style="list-style-type: none"> <li>• Please continue to send all questions to <a href="mailto:BHS-ECM@saccounty.gov">BHS-ECM@saccounty.gov</a></li> <li>• Continue to email questions/concerns/Anthem Success Stories to <a href="mailto:BHS-ECM@saccounty.gov">BHS-ECM@saccounty.gov</a></li> <li>• Next SUPT ECM Provider Meeting: TBD</li> </ul>	Dana	2:50 PM	5 min
<p><b>Training Updates</b></p> <ul style="list-style-type: none"> <li>• Training schedules have been posted through January</li> <li>• Updated Training Registration form We have made a couple of additional updates to the Training registration form. The link can be found here: <a href="https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx">https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx</a> <ul style="list-style-type: none"> <li>○ Agency name was updated to Program name; please list the program or programs where the staff you are registering for training will be working.</li> <li>○ A field has also been added to list the Fax Number for Prescribing staff. This is a required element when setting up prescribers in the system.</li> </ul> </li> <li>• CalMHSA EHR LMS Course Offerings – The CalMHSA EHR LMS Course Offerings is posted to the webpage.</li> </ul>	Kat	2:55 PM	10 min

<p>This document gives a description of the different LMS video trainings offered by CalMHSA as well as the estimated length of time to complete the training. The link can be found here: <a href="https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx">https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx</a></p> <ul style="list-style-type: none"> <li>Glossary of Terms – This is the list of frequently used terminology and acronyms used in conjunction with SmartCare. It is posted in the SmartCare Technical Support section. The link can be found here: <a href="https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Support.aspx">https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Support.aspx</a></li> <li>Upcoming 2024 User Forums – The next SUPT User Forum will be on January 24<sup>th</sup> at 2pm.</li> </ul>			
<p><b>New EHR-SmartCare</b></p> <ul style="list-style-type: none"> <li>Diagnosis Document Issue – We have come across a few instances where a finalized Diagnosis Document for a client was not tied to a program. This has happened when a user attempts to create a new diagnosis document while in the middle of editing or creating another version of the document for the same client. Streamline is working on a fix to prevent this from happening. In the meantime, please be sure to either save or exit out of their diagnosis document if you are going to create a new version. <ul style="list-style-type: none"> <li>UPDATE: Streamline has resolved this issue.</li> </ul> </li> <li>CalOMS Annual Update Workaround – It was brought to our attention that users were having an issue creating a CalOMS annual update when the client had their previous CalOMS update complete in Avatar. For example, a client is admitted to your program November 2021 in Avatar and you completed their annual update November 2022 in Avatar. When attempting to complete their November 2023 annual update in SmartCare, the system is throwing an error stating the dates are too early or too late. While Streamline is looking to apply a fix for this issue, the workaround is to determine the Annual Update Number, for this example it would be Annual Update 2 and enter that number into the Annual Update field. This question will not be displayed until you select Annual Update as the transaction type. This will allow you to complete and sign the document.</li> </ul>	Kristi	3:05 PM	5 min
<p><b>Open Forum</b></p>	All	3:10 PM	20 min

## Program Staff Services Export (SAC)

### Parameters:

1-Start Date (date of service)

2- End Date (date of service)

3- One or Multiple Program Selection - based on Programs currently assigned to the logged in user

4- One or Multiple Staff Selection – based on staff who have provided services in the selected program(s) during the selected date range

### Report Rules:

Number of clients in group is calculated based on

- service is a group code
- services are in the same program
- services are on the same date
- services started at the same time
- services are for the same procedure code
- *NOTE: clinician is not evaluated here as multiple staff can facilitate a single group*

Flex = 'Y' for SAC local flex procedures

FTF, Doc and Travel times are all divided by the Number of Clients in Group if it is a group procedure code

FTF, Doc and Travel times are all ZERO for duration based add-ons. The “durations” for these would be included in the primary code. These rows are included however because the Charge information is unique to them

Service Date	Service ID	Procedure Name	Group?	Group Num	Flex?	Add-on	Staff Name	Degrees	FTF	Travel	Doc	Status	Charge Code	Charge Date	Charge Units
10/20/23	612280	TCM/ICC	N	1	N			Other Qualified Provider	10.00	0.00	5.00	Complete	NOMIN	10/24/23	1.00
10/25/23	628904	Psychosocial Rehab - Individual	N	1	N			Other Qualified Provider	30.00	0.00	5.00	Complete	NOMIN	10/27/23	1.00
10/25/23	629738	TCM/ICC	N	1	N			Other Qualified Provider	18.00	0.00	5.00	Complete	T1017	10/27/23	1.00
10/5/23	455298	Assessment LPHA	N	1	N			AMFT Associate Marriage Family Therapist	1.00	0.00	1.00	No Show			
10/3/23	445799	Assessment LPHA	N	1	N			AMFT Associate Marriage Family Therapist	150.00	0.00	10.00	Complete	90791	10/8/23	1.00
10/3/23	477558	Prolonged Office or Other Outpatient EM Service(s) beyond the Maximum Time	N	1	N	Y		AMFT Associate Marriage Family Therapist	0.00	0.00	0.00	Complete	G2212	10/8/23	9.00
10/23/23	615935	Individual Therapy	N	1	N			AMFT Associate Marriage Family Therapist	55.00	0.00	10.00	Complete	90832	10/24/23	1.00
10/6/23	452090	Client Non-Retiable Surv. Mgmt Document	N	1	N			AMFT Associate Marriage Family Therapist	1.00	0.00	1.00	No Show			