

AGENDA



Electronic Health Record (EHR) SUPT User Forum

Date: September 24, 2025

Time: 2:00-3:30 PM

Location: Virtual using Zoom

Facilitator: Kristi Duthler

Scribe: Chean Chheng

Attendees: (See sign in sheet)

Topic	Presenter	Start Time	Length
Welcome/Introductions - Zoom meeting overview Agencies attended: - WellSpace - River City Recovery - Bridges - CORE Medical Clinic - Serenity Recovery Solutions - Sunrise Health & Wellness Center - Transitions - Sac Recovery - GLOM - Sacramento Recovery House - Recover Medical Group - Aegis - Stanford Youth - Our December user forum will move to the TEAMS platform - Avatar contract ended 6/30/25 - Not using test clients in the live SmartCare environment - New Agenda Item for future User Forums: Provider Topics - Support/Training Registration and Billing Mailboxes Support: BHS-EHRSupport@saccounty.gov Training Registration: BHS-EHRTrainingReg@saccounty.gov Billing: BHS-EHRBilling@saccounty.gov Staff movement/promotions - Sarah Saldivar promoted to ASO II – overseeing	Kristi	2:00 PM	5 min

SUPT Claiming ○ Mike Hagel promoted to ASO II – overseeing Mental Health Claiming ○ Stacey Callahan promoted to ASO II – overseeing Support ○ Alam Abo Kweder & Jamie Belanger promoted to Accounting Technicians, supporting SUPT ○ Ranjana Prasad was promoted to Accounting Technician (Mental Health & EHR Billing) ○ Liliana Barraza was promoted to ASO I – BH-Connect & new initiatives and supporting both MH and SUPT ○ Guadalupe Anguay and Leticia Nevarez joining EHR team ASO I ○ Alona Kozachenko joins Training Registration team			
Medi-Cal Claiming/Fiscal Update ● Claiming Updates through July 2025 services. ● Denials—Make sure you run your program reports and work on the denials. ● Claims Correction Spreadsheet (CCS) - CCS are currently being completed in timely manner as we receive them.	Sarah	2:05 PM	10 min
Other Billing/Claiming Items ● Local MAT services transition to CalMHSA MAT services effective 10/1/25 ○ Crosswalk of procedure codes shared via email. ○ Sacramento Procedure Codes will be switched to CalMHSA Procedure Codes. ○ Codes will apply to services October 1, 2025, and onward. ● DHCS ODS billing manual updated (effective September 2025) ○ Use Drug Medical ODF, not State Plan ○ Contingency Management is included (Pg. 36-37) ○ MedCCC - Library	Richard	2:15 pm	5 min
ECM Claiming Update ● SmartCare Claiming Updates through June 2025 for Health Net and Anthem and awaiting adjudication. ● Please remember to use client CIN number for their insured ID ● All ECM programs begin with ZZ and ECM. ● ECM & (SAC) Reports in SmartCare	Mike	2:20 PM	10 min

SmartCare Support Reminders • Please reach out to us for support questions at BHS-EHRSupport@sacounty.gov or PHONE • It is recommended to avoid using the Web Browser Password Auto fill. • Remove Autofill Tip Sheet.pdf • Notifying EHR Team and QM when staff are terminated • Notifying EHR Team when a program closes Inquiries Screen • Added New Referral Clinician, Psych Testing, Clinician • Added Priority to the Urgency dropdown. Special Populations Screen • Added AOT-Court Settled to the Special Population Type dropdown Issue Fixes- • Service Notes screen-a new animation was added when a reviewer/cosigner declined to sign a note. This was added to encourage the user to stay on the page to allow the processing to be completed. Once completed the note will move to In Progress as intended.	Justin	2:30 PM	10 min
SmartCare Reports • Release Items • Specific Housing Reports ○ Special Populations Housing Status Report (SAC) ○ Special Populations Report (SAC) ○ Program Demographics Report (SAC) - See attachment for full list of updates	John/Val	2:40 PM	10 min
CalAIM • The next ECM Provider meeting is October 2 at 9:00 A.M. Health Net will be attending to discuss options for former and current ECM providers to contract directly with them as an ECM/Community Supports provider.	Darlene	2:50 PM	5 min
Training Updates • Welcome Alona Kozachenko to Training Registration • Training schedules posted through October 2025, and training schedules through December will be posted at the end of the month. • Training Surveys – encourage providers to provide feedback on our trainings to reflect and make improvements. • Slide Deck Updates ○ SUPT Provider Admin	Kat	2:55 PM	10 min

○ Microsoft PowerPoint - website_SUPT Provider Admin Training_081925.pptx ○ Service Corrections ○ dhs.saccounty.gov/BHS/BHS-EHR/Documents/Website_Service_Corrections_081925.pdf ● Next SUPT User Forum: Wednesday, December 3rd at 2pm ○ Moving to MS Teams			
New SmartCare Items or Issue Updates ● AB 352 ○ Using the Special Populations screen, AB352 compliance can be documented using the new special population types below: ▪ AB352-Abortion ▪ AB352-Contraceptopm ▪ 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/ ● CalOMS Discharge Clean-up Project ○ If discharge data is correct, no action is needed.	Kristi	3:05 PM	5 min
Open Forum ○ No additional questions or topics raised ○ Meeting adjourned early	All	3:10 PM	15 min

Program Signed Assessments (SAC) T DAT added

Care Plan Status (SAC) Split into Housing/Regular based on procedure ***SAC_Housing Plan Development***

Program Charge Summary (SAC) Add Service Date parameter range to mimic Contract Provider Charge Export

Program Denials (SAC) Add Provider Taxonomy from 837, Move Staff ID/Name to support CCS Export, clean up layout to eliminate split columns in Excel Export

Inpatient LOS (SAC_MHTC) Added Whiteboard Attending and Last ICD10 in the Date Range of the admission

Client Contacts Report (SAC) Modified to not exclude records (PCP was the specific request) which do not include Phone #

Staff for Programs Report (SAC) Modified to pull taxonomy code from the new historical License based locations

Service Import Batch Report (SAC)

For Batches Imported Between And

Programs

BatchName

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Service Id	Fail Errors	Client ID	Clinician Id	Procedure Id	Location Id	Date Of Service	FTF	Travel	Do
5161336			1022915	7	11	8/4/2025 6:00:00 PM	88		
5171962						5:00:00 PM	80		
5158010						0:00:00 PM	90		
5173704			1011129	105	11	8/12/2025 8:00:00 AM	20		
5172655			1011129	7	2	8/21/2025 6:00:00 PM	120		
5166748			1021930	7	11	8/1/2025 6:00:00 PM	86		
5160556			1022353	18	11	8/5/2025 3:00:00 PM	43		
5173247			1021930	7	11	8/8/2025 6:00:00 PM	50		
5160060			1021930	7	11	8/15/2025 6:00:00 PM	34		
5169552			1022353	18	11	8/19/2025 3:00:00 PM	38		
	Client not enrolled in this program as of the date of service		1011129	105	11	8/6/2025 2:30:00 PM	20		

ANSA Program Export (SAC)

Replicated from the CANS reports. Shows all clients open to the program(s) in the date range selected with either ALL or the LAST ANSA per client. Domains to include defaults to all but can be modified

Start Date

7/1/2025

End Date

8/31/2025

View Report

Programs

Status

All ANSA

Domains to Include

Life Functioning, Strengths, Cultural

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Find

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Client ID	Client Name	Current Age	Program	Enrolled	Discharged	Current Clinician/Therapist	ANSA Date	Type	Assessor Name	LIF Family	LIF Employment	LIF Social	LIF Recreational
		52		03/14/23		Tr	04/09/24	Scheduled Update	T	1	0	1	0
		52		03/14/23		Tr	10/14/24	Scheduled Update	T	1	0	1	0
		52		03/14/23		Tr	04/14/25	Scheduled Update	T	1	0	1	0
		50		08/22/25		Tr							
		53		11/07/24	07/16/25		11/19/24	Initial	D	0	2	0	0
		13		04/12/19		Li							
		52		09/04/24		Ch	09/11/24	Initial	B	1	1	0	0
		52		09/04/24		Ch	10/24/24	Scheduled Update	Li	1	1	1	0
		52		09/04/24		Ch	04/21/25	Scheduled Update	G	1	1	1	0
		34		08/21/25		Ce							
49	08/04/21			08/14/23	Scheduled Update	H	1	3	2	1			

Client MAR Report (SAC_MHTC)

For the selected client, defaults to show MAR for the past 7 days for All order types, for All orders. But All of those (date range, order type and specific orders to include) can be modified

Start Date8/26/2025End Date9/2/2025

OrderTypesAdditional, Nursing, Labs, MedicationOrdersMHTC Lab-CBC (INCLUDES DIFF/PLT)

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Selected MAR for [REDACTED] 8/26/2025 through 9/2/2025

	8/26	8/27	8/28	8/29	8/30	8/31	9/1	9/2
Order	21:00	05:10		06:0008:0009:3011:0021:00	05:5306:0008:0011:00			
acetaminophen 325 mg tablet Last Given: 2025-08-30 05:53 2.00 Tab, Oral, Every 6 Hours As Needed Medication ~ <i>Active</i>			✓		✓			
clonazepam 1 mg disintegrating tablet 1.00 TbDi, Oral, As Directed (SET 2 TIMES/DAY MAR ONLY)- See Instructions start 8/29 klonopin 1mg BID scheduled for agitation, will continue to monitor medication acceptance and presentation Medication ~ <i>Discontinued</i>							✗	✗

MHTC Lab-TSH with Reflex to Free T4 36127 (Active)

acetaminophen 325 mg tablet (Active)

clonazepam 1 mg disintegrating tablet (Discontinued,,

diphenhydramine 50 mg capsule (Active)

diphenhydramine 50 mg/mL injection solution (Discor

docusate sodium 250 mg capsule (Active)

Geri-Lanta 200 mg-200 mg-20 mg/5 mL oral suspens

haloperidol lactate 2 mg/mL oral concentrate (Discont

haloperidol lactate 5 mg/mL injection solution (Discor

lithium carbonate 300 mg tablet (Active)

lorazepam 1 mg tablet (Active,Discontinued)

lorazepam 2 mg/mL injection syringe (Discontinued)

olanzapine 5 mg disintegrating tablet (Active)

valproic acid (as sodium salt) 250 mg/5 mL oral soluti

Demographics by Diagnosis Category (SAC)

For clients open in a date range with their most recent diagnosis prior to the end date, breaks down by 3 possible groupings for Sex, Age, Language and Race

Groupings are

- 1- Diagnosis Combination (MH only, SUD only, Dual DX, NONE or Z Code Only)
- 2- SUD Only
- 3- MH Only

Start Date: 7/1/2025 End Date: 8/31/2025

Programs: [Redacted] Diagnosis Breakdown Category: Diagnosis Combination

1 of 2 ? Find Next

Demographics by Diagnosis Group

[Redacted] And 1 Other Programs

For Clients Enrolled Between 07/01/25 and 08/31/25 and with their most recent Diagnosis Prior to 08/31/25

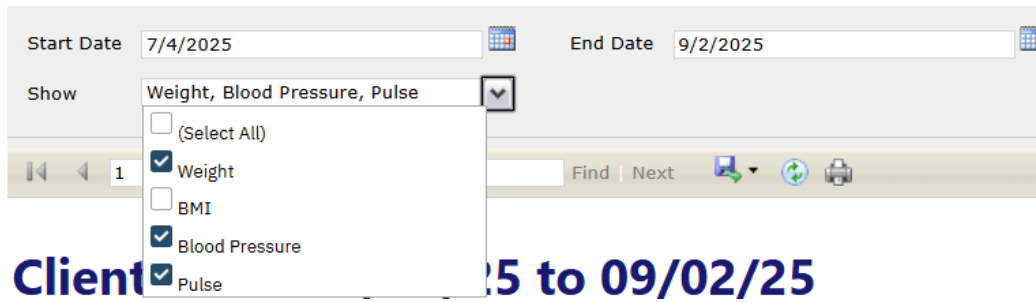
Diagnosis Group by Sex		Diagnosis Group by Race																												
Dual DX	0	American Indian	Asian Indian	Black or African American	Black/African American	Cambodian	Chinese	Declined to answer	Filipino	Guamanian	Hmong	Korean	Laotian	Mien																
MH Only	6																													
NONE	1																													
SUD Only	0																													
Z Code Only	7																													
Total	14																													
		American Indian	Asian Indian	Black or African American	Black/African American	Cambodian	Chinese	Declined to answer	Filipino	Guamanian	Hmong	Korean	Laotian	Mien																
Diagnosis Group by Language																														
Anxiety Disorders (F4x)	6	0			0			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
Eating/Sleep Disorders (F5x)	0	0			0			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
Mood Disorders (F3x)	14	0			0			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
MultiDiagnosis	36	2			1			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
NONE	27	0			1			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
Personality Disorders (F6x)	0	0			0			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
Schizophrenia/Delusional (F2x)	3	1			1			0			0			0	0	0	0	0	0	0	0	0	0	0	0					
Total	86	3			3			2			1			1	1	1	1	1	1	1	1	1	1	1	1					

OR it can be run to show the details only

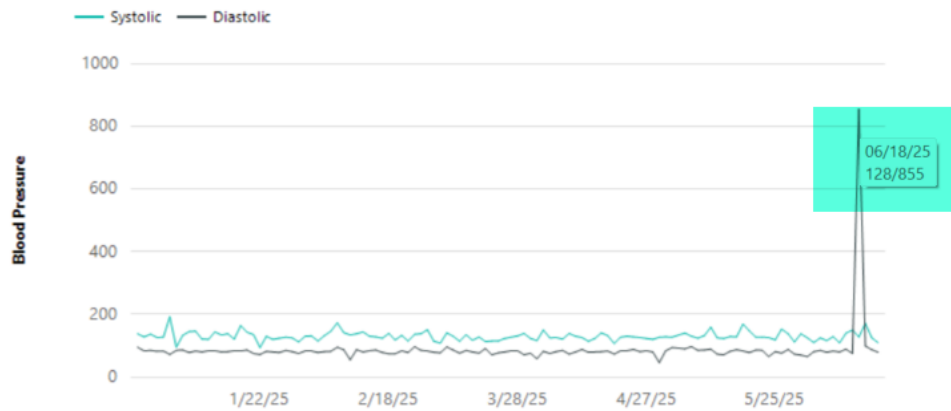
Program Name	Client Name	Client ID	Enrolled	Discharged	DXDate	Group ↕	MH DX ↕	SUD DX ↕	Sex	Age Group	Primary
Center (992)			06/11/25		06/11/25	MH Only	Anxiety Disorders (F4x),Mood Disorders (F3x)		M	50+	
			06/13/25		06/13/25	Z Code Only			M	26-49	English
			08/15/25		08/15/25	MH Only	Anxiety Disorders (F4x),Mood Disorders (F3x)		F	50+	English
			08/30/24		08/30/24	Dual DX	Anxiety Disorders (F4x)	Cannabis Related (F12),Cocaine Related (F14),Opioid Related (F11)	M	18-25	English

Client Vitals Report (SAC)

For the selected client and defaulted to the last 60 days, shows graphs for Weight, BMI, BP and Pulse



Hovering the mouse over out of range readings will show the date so they can be corrected



Progress Note STAFF Search (SAC)

Replicated from the Abbreviated Notes Report (or Progress Note Search), but STAFF based instead of CLIENT based. Staff search is NOT secured, but output is CDAG secured. Staff can be searched by StaffID, UserCode, Last Name, First Name, Full Name or Email or any portion of any of those

After entering search term, drop down will populate with matching staff names

Date range defaults to the past 90 days, but can be changed

Programs and Procedures are driven by Authored notes in the date range, but default to All

Search text allows for searching actual note text for a word/phrase if desired

Staff ID/Name/Usercode/Email

sawyerj

Author

Sawyer, John (jsawyer) sawyerj@saccounty.gov

Start Date

5/21/2025

End Date

Programs

xxxxSacCo-APSS-Broadway(34CZKA)

Procedures

Search Text

pcit

☐ NULL

Search For

Sawyer, John (jsawyer) sawyerj@saccounty.gov

Sawyer, John (jsawyer) sawyerj@saccounty.gov

Sawyer, TestAccount (sawyerj2) sawyerj2@saccounty.gov

Zaborski, Bernice (sawyerj) sawyerj@saccounty.gov

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Progress Notes by Staff

Sawyer, John

Client / Program	Procedure / Status	Date / Units
Test, Entry 758277000 xxxxSacCo-APSS-Broadway(34CZKA)	Assessment LPHA Signed	07/17/25 2
Progress Note Information	afdafds	
Progress Note Care Plan	Recommended Treatment: Parent-Child Interaction Therapy (PCIT) Care plan written by Erika Leacox. Care plan reviewed by Robyn Metcalfe and Dr. Dawn Blacker upon initiation of PCIT.	

Program Housing Days Report (SAC)

For Clients enrolled during the date range selected, counts the number of days by special population

- 1- **Admitted** (open enrollment)
- 2- Literally Homeless (Literally Homeless-Chronic Homelessness OR Literally Homeless-Not Chronic Homeless)
- 3- Other Homeless (Homeless-Sheltered OR Homeless-Bridge/Interim OR Transitional Temporary Housing)
- 4- Housed (Housed/No Imminent Risk of Homelessness OR Imminent Risk for Homelessness)

If none of the above in the date range selected, notes No Housing on File

If there is ANY record of Chronic Homelessness (even if not currently active), flags the client as HX of Chronic

Note total days in a housing status could OVER or **UNDER** count based on open days if special populations overlap or do not cover the full date range

Start Date End Date
Programs 
1 of 2 ? Find Next 

Program Housing Days

 And 1 Other Programs

For Clients Enrolled Between **01/01/25** and 03/31/25

Program Name	Client Name	Client ID	Admit	Discharge	Days Admit In Date Range	Days Literal Homeless	Days Other Homless	Days Housed	No Housing On File	History of Chronic
		1 	02/06/24		90	0	0	90		
		1 	10/08/24		90	90	0	0		
		3 	08/15/22		90	90	0	0		Y
		7 	07/03/23	07/14/25	90	90	0	0		Y
		9 	12/24/24	01/14/25	14	0	0	0	Y	
		1 	08/22/24	02/04/25	35	0	0	0	Y	
		1 	12/31/24	02/05/25	36	0	0	0	Y	
		1 	07/12/24		90	0	0	90		
		1 	09/14/22		90	0	0	90		
		1 	08/15/24		90	0	15	0		

The footer includes Counts of Clients, Clients with No Housing and Clients with a History of Chronic Homelessness

It also included totals of DAYS for Days Admitted, Days Literally Homeless, Days Other Homeless and Days Housed

Program Name	Client Name	Client ID	Admit	Discharge	Days Admit In Date Range	Days Literal Homeless	Days Other Homless	Days Housed	No Housing On File	History of Chronic
			03/21/25		11	0	0	0	Y	
			03/28/25		4	0	0	0	Y	
		Totals: 927			68,634	5,449	4,797	22,826	534	47