

# AGENDA



## Electronic Health Record (EHR) SUPT User Forum

**Date:** March 25, 2026

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

**Location:** Virtual using Teams

**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>• <b>Agencies attended:</b><ul style="list-style-type: none"><li>○ River City Recovery</li><li>○ BHS SUPT</li><li>○ BHS CQI</li><li>○ BHS DAT</li><li>○ CORE Medical Clinic</li><li>○ VOA</li><li>○ Serenity Recovery Solutions</li><li>○ Hope Cooperative</li><li>○ Baymark Health Services</li><li>○ Monarch Recovery Centers</li><li>○ GLOM</li><li>○ Sacramento Recovery House</li><li>○ Recover Medical Group</li><li>○ Bridges</li><li>○ WellSpace</li><li>○ SSYAF</li><li>○ Aegis</li></ul></li><li>• Not using test clients in the live SmartCare environment</li><li>• AI note takers<ul style="list-style-type: none"><li>○ We will be removing any AI note takers</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>SUPT Program Updates</b> <ul style="list-style-type: none"><li>• Renewal packers have been sent out and are being reviewed by Monica and Kari as they are received, and</li></ul>	Kristi	2:05 PM	5 min

<p>addressing errors as needed.</p> <ul style="list-style-type: none"> <li>• Program is currently working on updates to contract language for FY26/27 contracts</li> </ul>			
<p><b>Medi-Cal Claiming/Fiscal Update</b></p> <ul style="list-style-type: none"> <li>• Claiming Updates <ul style="list-style-type: none"> <li>◦ Completed January 2026, currently working on February services</li> </ul> </li> <li>• Denials <ul style="list-style-type: none"> <li>◦ Make sure you run your program reports and work on the denials.</li> </ul> </li> <li>• Claims Correction Spreadsheet (CCS) <ul style="list-style-type: none"> <li>◦ CCS are currently being completed in timely manner as we receive them</li> </ul> </li> </ul>	Karen	2:10 PM	10 min
<p><b>ECM Claiming Update</b></p> <ul style="list-style-type: none"> <li>• SmartCare Claiming Updates <ul style="list-style-type: none"> <li>◦ Claimed through 12/31/25</li> </ul> </li> <li>• ECM &amp; (SAC) Reports in SmartCare <ul style="list-style-type: none"> <li>◦ Reminder to run your billing reports</li> </ul> </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</li> </ul>	Mike	2:20 PM	10 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@sacounty.gov">BHS-EHRSupport@sacounty.gov</a> <ul style="list-style-type: none"> <li>◦ Please avoid going straight to CalMHSA for support since they may not know specific work processes and requirements for Sacramento.</li> </ul> </li> <li>• Notifying EHR Team and QM when staff are terminated <ul style="list-style-type: none"> <li>◦ We want to make sure that we are removing access for terminated staff</li> </ul> </li> <li>• Known issues and updates posted on website <ul style="list-style-type: none"> <li>◦ Current issues, resolved issues and workarounds updated on our Known issues spreadsheet</li> </ul> </li> </ul> <p><b>Common Support Questions Demo</b></p> <ul style="list-style-type: none"> <li>• Clearing briefcase errors</li> </ul>	Stacey	2:30 PM	10 min
<p><b>Authorization to Share Confidential Member Information (ASDMI)</b></p> <ul style="list-style-type: none"> <li>• The form will be going out this week, replacing coordinated care consent. Affective April 1st, the ASDMI form must be implemented. An information memo regarding the ASDMI form will be going out this week. The current consent will be valid until a new ASDMI consent form is completed.</li> <li>• <b>Non AB-133 (ASDMI) Screen Demo</b> <ul style="list-style-type: none"> <li>◦ Guidance on completing the form: <a href="#">How to Complete the ASDMI - 2023 CalMHSA</a></li> </ul> </li> </ul>	Christine/ Stacey	2:40 PM	10 min

<p><b>TADT: New Functionality Demo</b></p> <ul style="list-style-type: none"> <li>• How to Error Out</li> </ul> <p><b>Special Populations Screen</b></p> <ul style="list-style-type: none"> <li>• Added new value DA Core</li> </ul>	Justin	2:50 PM	10 min
<p><b>SmartCare Reports</b></p> <ul style="list-style-type: none"> <li>• See <a href="#">Release Items</a></li> </ul>	John	3:00 PM	10 min
<p><b>TADT</b></p> <ul style="list-style-type: none"> <li>• Deadline to complete for NACT submission <ul style="list-style-type: none"> <li>○ All data needs to be submitted no later than April 3<sup>rd</sup>. We will be submitting the data to the State on April 10th</li> <li>○ Dates going TADTs going to the state will be between March 1<sup>st</sup> – March 31<sup>st</sup></li> </ul> </li> </ul>	Dawn	3:10 PM	5 min
<p><b>Training Updates</b></p> <ul style="list-style-type: none"> <li>• Training schedules posted through May 2026</li> <li>• Training Resources: <ul style="list-style-type: none"> <li>○ <a href="#">SUPT Provider Admin</a> updated 3/4/26</li> <li>○ <a href="#">Service Corrections</a> updated 2/25/26</li> <li>○ <b>Updated-</b> <a href="#">TADT tip sheet</a></li> </ul> </li> <li>• <b>Reminders:</b> <ul style="list-style-type: none"> <li>○ Use the most recent version of the training registration form (currently dated 3/17/26)</li> <li>○ New Programs must be created in SmartCare prior to registering their staff for training.</li> </ul> </li> <li>• Next SUPT User Forum: Wednesday, May 27<sup>th</sup> @ 2pm</li> </ul>	Stacey	3:05 PM	5 min
<p><b>New SmartCare Items or Issue Updates</b></p> <ul style="list-style-type: none"> <li>• <b>CalOMS</b> <ul style="list-style-type: none"> <li>• Reporting CalOMS in small batches: will be sending errors for corrections out to providers as we receive them <ul style="list-style-type: none"> <li>○ Please work on these errors as soon as possible so we can send these to the state.</li> <li>○ We've been seeing a lot of FSN errors</li> <li>○ If you had a change of contact for who to work with for the CalOMS, please reach out to us to get this updated at <a href="mailto:bhs-ehrsupport@saccounty.gov">bhs-ehrsupport@saccounty.gov</a>.</li> </ul> </li> <li>• CalOMS Outside Provider List Page - Clients that do not have Sacramento County Medi-Cal <ul style="list-style-type: none"> <li>○ If interested in using this screen, please reach out to support team at <a href="mailto:bhs-ehrsupport@saccounty.gov">bhs-ehrsupport@saccounty.gov</a> and we will set up a time to talk through the process and get your program set up</li> </ul> </li> </ul> </li> </ul>	Kristi	3:10 PM	5 min

<p><b>Open Forum</b></p> <ul style="list-style-type: none"> <li>• Is this consent required on all patients entered in SmartCare? Including in those programs that do not use SmartCare as their EHR? <ul style="list-style-type: none"> <li>• Our current understanding is yes. AB-133 is a legislation that affects/includes all Medi-Cal beneficiaries</li> </ul> </li> <li>• Does this ASCMI form need to be completed if the client does not consent? <ul style="list-style-type: none"> <li>• Yes, they would indicate their preference not to consent on the form.</li> </ul> </li> <li>• Just to clarify: if the patient denies consent, outside providers will have no access to their treatment history of any kind in our SUPT program, right? (I know this will be their biggest concern.) <ul style="list-style-type: none"> <li>• Correct, if they select no on the consent to share their SUPT data, the data will not be shared and MH providers will not be able to view that information. Standard ROI's with 3rd parties will apply.</li> </ul> </li> </ul>	All	3:15 PM	15 min
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## 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

**NEW: “Wrong Type” status if the TADT type does not match the Program Type (i.e. Opioid in an OP program)**

**NEW: ERROR records will now be excluded, so if you have a “Multiples” issue, you can correct that yourself**

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, Multiples or Wrong Type, it flags yellow if Multiples OR Wrong type, and one or more of those should be deleted

## Program TADT Status

██████████ And 1 Other Programs

For Clients Enrolled Between 11/19/2025 and 12/4/2025

Program Name	Client Name	Client Id	Enrolled	Program Type	Overall TADT Status	Days Pending	Is Urgent	First Req	First Offered	First Rendered	First Offered
██████████	██████████	██████████	11/19/25	MH OP	None	99					
██████████	██████████	██████████	12/03/25	MH OP	Complete			12/03/25	12/04/25	12/04/25	12/0
██████████	██████████	██████████	11/21/25	MH OP	None	97					
██████████	██████████	██████████	11/21/25	MH OP	Complete		N	11/21/25	11/26/25	12/03/25	12/0
██████████	██████████	██████████	12/04/25	MH OP	None	84					
██████████	██████████	██████████	12/03/25	DMC OP	Multiples			09/08/25	12/11/25		
██████████	██████████	██████████	12/03/25	DMC OP	None	85					
██████████	██████████	██████████	11/19/25	DMC OP	Wrong Type			11/11/25	11/19/25		
██████████	██████████	██████████	12/02/25	DMC OP	Complete			11/28/25	12/02/25		

**NEW: For Mental Health programs, a second page will generate for MH Psychiatric TADT records, which are not admission timed**

Program Name	Client Name	Client Id	Enrolled	TADT Type	Overall TADT Status	Days Pending	Is Urgent	First Req	First Offered	First Rendered	First FU Offered	F R
			12/01/25	MH Psychiatric	Complete		Y	12/16/25	01/16/26	01/16/26		
			12/04/25	MH Psychiatric	Complete		Y	12/17/25	01/30/26	01/30/26		
			12/04/25	MH Psychiatric	Complete		N	12/17/25	01/23/26	01/23/26		

### Program Treatment Team Assignments (SAC)

Fixed for 2 issues:

- Deleted clients (most often caused by a Merge) will now no longer show
- Inactive/End dated assignments will no longer show (the Caseload screen has been fixed for this)

### Medi-Cal Correction Tracking (SAC)

Modified the Program parameter to allow for selecting multiples, although note this WILL cause a performance impact

### Program Coverage Report (SAC)

Modified the “Missing Financial Info” tag to also flag if the client is missing Sex or DOB

Bad Address	Missing Sex	03/03/26	Blue Cross of CA-Anthem (160)	United Behavioral Health Plan (435)	N 9
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# Client Clinical Problems Report (SAC)

**NEW**- Client based. Pulls in ALL problems ever, including end dated

## Client Clinical Problems

C [REDACTED] 0)

Program Name	SNOMED Description	SNOMED Code	ICD10 Code	Start Date	End Date	Created Date	Created By Name	Created By Degree
[REDACTED]	Continuous chronic alcoholism (disorder)	191811004	F10.20	11/14/23		11/20/2023 11:19:34 AM	[REDACTED]	LCSW Licensed Clinical Social Worker
[REDACTED]	Post-trauma response (finding)	39093002	F43.10	11/14/23		11/20/2023 11:19:52 AM	[REDACTED]	LCSW Licensed Clinical Social Worker
[REDACTED]	Recurrent depression (disorder)	191616006	F32.A	11/14/23		11/20/2023 11:20:01 AM	[REDACTED]	LCSW Licensed Clinical Social Worker
ZZ	3.1) Social withdrawal (finding)	105411000	Z60.8	02/12/24		2/12/2024 12:16:12 PM	[REDACTED]	Certified AOD Counselor
ZZ	3.1) Suspected drug abuse	162591001	Z03.89	02/12/24		2/18/2024 7:50:35 AM	[REDACTED]	ASW Associate Social Worker
ZZ	3.1) Alcohol abuse (disorder)	15167005	F10.10	02/14/24		2/18/2024 7:50:50 AM	[REDACTED]	ASW Associate Social Worker
ZZ	3.1) Receiving unemployment benefits	671411000124106	Z56.0	02/22/24		2/22/2024 4:12:03 PM	[REDACTED]	Registered AOD Counselor
ZZ	3.1) Stopped work (finding)	160895006	Z56.0	02/22/24		2/22/2024 4:12:45 PM	[REDACTED]	Registered AOD Counselor
ZZ	3.1) Sheltered homelessness	611131000124100	Z59.01	02/22/24		2/22/2024 4:18:35 PM	[REDACTED]	Registered AOD Counselor
ZZ	3.1) Emotional adjustment - finding	365230008	Z60.0	02/22/24		2/22/2024 4:20:40 PM	[REDACTED]	Registered AOD Counselor
ZZ	3.1) Girlfriend relationship problem (finding)	160824003	Z63.0	02/22/24		2/22/2024 4:25:56 PM	[REDACTED]	Registered AOD Counselor
ZZ	3.1) Discord with social worker (finding)	105519001	Z64.4	02/22/24		2/22/2024 4:27:31 PM	[REDACTED]	Registered AOD Counselor
ZZ	3.1) Imprisonment (finding)	45361006	Z65.1	02/22/24		2/22/2024 4:28:16 PM	[REDACTED]	Registered AOD Counselor
77	3.1) Has a prison record	266944002	Z65.3	02/22/24		2/22/2024 4:30:49 PM	[REDACTED]	Registered AOD Counselor

Last Modified Date	Last Modified By Name	Last Modified By Degree
5/31/2024 2:53:11 PM	[REDACTED]	Other Qualified Provider
5/31/2024 2:53:11 PM	[REDACTED]	Other Qualified Provider
5/31/2024 2:53:11 PM	[REDACTED]	Other Qualified Provider
2/12/2024 12:16:12 PM	[REDACTED]	Certified AOD Counselor
2/18/2024 7:50:35 AM	[REDACTED]	ASW Associate Social Worker
2/18/2024 7:50:50 AM	[REDACTED]	ASW Associate Social Worker
2/22/2024 4:12:03 PM	[REDACTED]	Registered AOD Counselor
2/22/2024 4:12:45 PM	[REDACTED]	Registered AOD Counselor

## **Suggestions?**

### ***Census Summary***

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

### ***Program Medications***

- Waiting on CalMHSA RX implementation 4/1
- Medications for clients currently open regardless of source
- Specific data wanted? (same format as Face Sheet?)

### ***ASCFI by program***

- Program Signed Assessment?
- Last signed by client?