AGENDA

Electronic Health Record (EHR) SUPT User Forum

Date: July 30, 2025
Time: 2:00-3:30 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**:
• **CORE**
• **River City Recovery**
• **Sacramento Recovery House**
• **WellSpace Health**
• **Recover Medical Group**
• **Bridges**
• **Aegis**
• **GLOM SAP**
• **Saint Martin**
• **Transitions**
• **MedMark**
• Any records request please reach out to QM @QMInformation@saccounty.gov
• Avatar contract ended 6/30/25
• Do not use test clients in the live SmartCare environment, reach out to EHR Training Registration team to get access to Training environment for testing.
• New Agenda Item for future User Forums: **Provider Topics –** We are providing an opportunity to discuss items that users would like to be brought to attention during our User Forum meetings. Please reach out to us with your items in advance to allow us to prepare material and subject matter experts to discuss the topics. SmartCare survey: link expires 7/31/25. CalMHSA wanted to know about user experience in the system
• Support/Training Registration and Billing Mailboxes
   o **Support**: BHS-EHRSupport@saccounty.gov
   o **Training Registration**: BHS-EHRTrainingReg@saccounty.gov
	Melony	2:00 PM	5 min

o **Billing**: BHS-EHRBilling@saccounty.gov			
Medi-Cal Claiming/Fiscal Update • Claiming Updates – Services claimed through May 2025, and currently working on June • Denials—Make sure you run your program reports and work on the denials. • Claims Correction Spreadsheet (CCS) - CCS are currently being completed in a timely manner as received. • Duplicate Client IDs – received many requests to merge client IDs. We want to remind users to please research clients to avoid making duplicate. • On client search, search client by name, then by social security number. • When duplicate records are found please report them to the Billing Team using a client merger request form to BHS-EHRBilling@saccounty.gov	Karen	2:05 PM	10 min
Other Billing/Claiming Items • FY 25-26 Service Tables are available at the DHS library located here: https://www.dhcs.ca.gov/services/MH/Pages/MedCCC-Library.aspx • Ensure that you select the DMC-ODS Service Table (published 06/2025) • The billing manual for FY 25-26 is missing, and a ticket has been created awaiting response from MEDCCC.	Richard	2:15 pm	5 min
ECM Claiming Update • SmartCare Claiming Updates through April 2025 for HealthNet and awaiting adjudication. • ECM & (SAC) Reports in SmartCare – Reminder to run reports to identify and address errors. • Ensure you to use the client CIN number for insured ID. • Entering ECM Programs – All ECM programs being with ZZ ECM. • Entering ECM Procedure Codes – Begin with ECM and end with the Plan name.	Mike	2:20 PM	10 min
SmartCare Support • **Reminders** o Please reach out to us for support questions at BHS-EHRSupport@saccounty.gov o Recommended not to use the Web Browser Password Auto fill o Notifying EHR Team and QM when staff are terminated o Notifying the EHR Team when a program closes o Scanning o **Updates**	Justin	2:30 PM	10 min

○ **Contact Notes**
     ▪ Added 2 new selections to the Reasons dropdown **BHS-Sac 1ˢᵗ Attempt & BHS-SAC 2nd Attempt**
   ○ **Inquiries Screen-**
     ▪ Added New Referral type **Court**
      - Added new subtypes
     ▪ Added new subtype **CDCR** to **Criminal Justice Referral** type
   ○ **Special Population-** Added JI Population.
 ○ **Known Issue-** In the Staff Calendar if you reschedule an appointment, it is leaving the original appointment on the calendar and not auto deleting. This is causing a duplicate appointment, the original and the rescheduled appointment.
   • For now, the original appointment needs to be deleted. CalMHSA is working on a fix for this.
 	
 • **CalMHSA Updates**
   ○ **Staff Calendar-**Service Appointments' that include special characters in the 'Comment' section under the 'Service Detail' screen are now correctly listed in the correct timeframes in the 'Calendar' screen, allowing users to view and edit without any issues.
   ○ **Group Notes** screen updated-CalMHSA has updated the Group notes user interface to add more visibility when creating a Group note. They have also expanded text boxes.
     ▪ Key areas such as "Group and Staff", "Clients and Service Information" are now organized into separate and clearly defined tabs.
     ▪ This change reduces scrolling and maximizes the space available for each content block, significantly improving clarity and usability.
 ○ **Batch Service Entry-** We turned on the validation to verify if the Service you are entering for a staff falls within their license period. If it is not, you will not be allowed to save the service(s)
     ▪ If you have any questions regarding a staff's license, please reach out to DHSQMStaffReg@saccounty.gov for assistance.			

CalMHSA Timely Access Document Report • TADT completed for every new enrollment	Dawn	2:40 PM	5 min

SmartCare Reports
 • Release Items located at SmartCare Technical Support
New Requests
   ○ **Care Plan Status** – will be looking at the Care Plan Status Report and add a parameter to allow you to run for housing plans.
     ○ Requesting report with client housing status at the time of entry into the program and any changes in housing status during or after program completion.
   ○ Requesting a report that will show demographics broken down by diagnosis, that could identify the race, ethnicity, gender, age, etc. based on different diagnosis.
   ○ Request for reporting updates can be emailed to BHS-
	John/Val	2:45 PM	10 min

EHRSupport@saccounty.gov and must include your contract monitor.			
CalAIM • The next Collaborative Resource Roundtable is on 8/27 Topic - 988/CWRT/BACS – presented by Christina Irizarry • The next ECM Provider meeting is 8/7 at 9:00 A.M. • The next ECM training 8/7 @ 1:00 pm	Darlene	2:55 PM	5 min

Training Updates
• Training schedules posted through September 2025
• Slide Deck Updates
• SmartCare SUPT Provider Administrative Slides
   o SUPT Provider Admin Training 6/09/25
• Authorized Approver Manual last updated 6/03/25
   Next SUPT User Forum: Wednesday, Sept. 24th at 2pm
	Kat	3:00 PM	10 min

New SmartCare Items or Issue Updates
• AB 352
   o Using the Special Populations screen, AB352 compliance can be documented using the new special population types below:
      ▪ AB352-Abortion
      ▪ AB352-Contraception
      ▪ AB352-Gender Affirming Care
   o 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
   o We will be asking each agency to provide us with a Point of Contact (POC) that will act as the CalOMS liaison to facilitate the correction of errors
      o Once we've received the POC from your agency, we will be sending each POC their agencies list of errors, the tip sheet and instructions on how to complete the corrections.
   o These specific errors are related to transaction types and discharge status not being an allowable combination.
   o CalOMS Discharge Valid Service Type, Transaction Type and Discharge Status Combinations tipsheet have been created to assist staff with their corrections.
   o We will also be sending out a blast to our distribution list regarding the above.
	Kristi	3:10 PM	5 min

Open Forum **Question #1 Do providers need to add a modifier of HF for contingency management services, or are they hard coded?** Answer: The modifiers are hardcoded.	All	3:15 PM	15 min

July User Forum Updates

Group Notes update

- CalMHSA has updated the **Group notes** user interface to add more visibility when creating a Group note.
- Key areas such as "Group and Staff", "Clients and Service Information" are now organized into separate and clearly defined tabs.

- **Group service details screen:** The **Services** tab has been renamed to **Group** and this will in turn have two sub tabs named:
  - Group Details tab
  - Services tab

Group Service Detail

Group   Note   Other

Group Details   Services

Group

Group	Test IS clinician	Date	06/09/2025
Location	AOT Hospital Visit	Place of Service	
Status	Show		

Text boxes have also been expanded

Group Comment ⓘ   This practice lesson consists of short paragraphs about interesting subjects. Find fun keyboard typing practice—and learn something new! Our paragraph practice is great typing

The comment in this field is for internal use only, please enter clinical group documentation in the Note tab.

Specific Location   Newfolden, MN 56738

Evidence Based Practices

Staff   Add Staff...

	Staff Name	Unit	Type	Start	End
✕	TestingTG, Sahana	10	Minutes	8:00 PM	8:10 PM
✕	Test, Suganya	10	Minutes	8:00 PM	8:10 PM
✕	Admin, Systems	10	Minutes	8:00 PM	8:10 PM

Group Service Detail

- In the Group Service Details screen, when navigating to the Services tab, the Client section is renamed to "List of Clients" and it displays their Client Service Level information.
- List of Clients section width has been decreased to view the service information section more clearly and to view maximum data without excessive scrolling.
- The Client Name and Client ID are displayed in full, and the client's associated flags are displayed in the next line of the Client Name for better visibility.
- All the existing icons of the List of Clients section are retained without any change.
- The Service Information tab will be displayed on the right side of the Client section, along with the Custom Fields, Billing Diagnosis, Add-on Codes, Warnings and Errors, and Encounter Form tabs.

Batch Service Entry-New Validation for Staff License

Batch Service Entry

❌ None of Service records were saved. Please check services with exclamation points and correct any validation errors to proceed.

07/22/2025 📅 ▼	xxxxSacCo-APSS-Broadway(34CZK ✔	Staff Name ⬍	All Procedure Groups ✔	**Apply Filter**
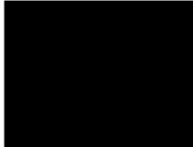
Client Preference ☐ M ☐ TU ☐ W ☐ TH ☐ F   ✔ Also Include Complete/Show Services for the day   ☐ Only Show Clients Seen In Last 90 Days

Last Name Begins With [Last Name Begins With... ▼]   [Organizational Hierarchy] [   ]

Default Values

Staff	Procedure Code		Time In	Time Out	Dur.	Location		Mode Of Delivery	
Staff Name ⬍	[▼]		[ ]	[ ]	[ ]	[▼]		Mode Of Delivery ▼	☐ Apply Default Values To Below Grid

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location	Comments
➕	⬛	☐ All Clinician ⬍	[▼]	07/22/202 📅▼	[ ]	[ ]	[ ]	[▼]	[ ]
➕	⬛	☐ All Clinician ⬍	[▼]	07/22/202 📅▼	[ ]	[ ]	[ ]	[▼]	[ ]
➕		☐ All Clinician ⬍	[▼]	07/22/202 📅▼	[ ]	[ ]	[ ]	[▼]	[ ]
➕	Test Entry (758277000)	✔ ❗ Miller, Justir ⬍	Assessment LPHA ▼	07/22/202 📅▼	8:35 AM	9:05 AM	30	Office ▼	[ ]
➕	Test Test (800019073)	☐		2/202 📅▼	[ ]	[ ]	[ ]	[▼]	[ ]

Date of Service must be within the active Staff License period.