

# AGENDA



## Electronic Health Record (EHR) SUPT User Forum

**Date:** December 3, 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
<p><b>Welcome/Introductions</b></p> <ul style="list-style-type: none"> <li>• <b>Agencies attended:</b></li> <li>• <b>River City Recovery</b></li> <li>• <b>Sacramento Recovery House</b></li> <li>• <b>Towns Health Services</b></li> <li>• <b>Bridges</b></li> <li>• <b>SSYAF</b></li> <li>• <b>Recover Medical Group</b></li> <li>• <b>Aegis</b></li> <li>• Not using test clients in the live SmartCare environment</li> <li>• Reach out to EHR-Training Registration team for access to TRAIN environment.</li> <li>• New Agenda Item for future User Forums: <b>Provider Topics</b></li> <li>• Support/Training Registration and Billing Mailboxes</li> <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-EHRTTrainingReg@saccounty.gov">BHS-EHRTTrainingReg@saccounty.gov</a></li> <li>• <b>Billing:</b> <a href="mailto:BHS-EHRBilling@saccounty.gov">BHS-EHRBilling@saccounty.gov</a></li> <li>• <b>Staff promotions</b> <ul style="list-style-type: none"> <li>○ <b>EHR Training and Support Team</b> <ul style="list-style-type: none"> <li>▪ <b>Taylor Hicks, ASO I</b></li> </ul> </li> <li>○ <b>Billing Team</b> <ul style="list-style-type: none"> <li>▪ <b>Juan Jimenez, Accounting Technician</b></li> <li>▪ <b>Mary Vue, Sr. Acct Clerk</b></li> <li>▪ <b>Maria Alejandra Adams, Sr. Acct Clerk</b></li> </ul> </li> </ul> </li> </ul>	Melony	2:00 PM	5 min
<p><b>Medi-Cal Claiming/Fiscal Update</b></p> <ul style="list-style-type: none"> <li>• Claiming Updates – Completed claiming through August 2025 and working on September services.</li> <li>• Denials—Make sure you run your program reports and work on the denials.</li> </ul>	Karen	2:05 PM	10 min

<ul style="list-style-type: none"> <li>Claims Correction Spreadsheet (CCS) - CCS are currently being completed in timely manner based on date received.</li> <li>July services had a few errors, and we are working with CalMHSAs to find out what caused the errors, and it was discovered that SmartCare claimed the services twice. These are denials that providers are not expected to work. A list of these services is being provided to Fiscal to not recouple the services.</li> </ul>			
<b>Other Billing/Claiming Items</b> <ul style="list-style-type: none"> <li>Coverage Screen – Please do not make updates to coverage unless necessary. Some updates can cause the service to be stuck at the client account or a non-billable payor and will be in a “closed” status. Because it’s in a closed status, the system will not automatically move it back to the billable payor and will be missed during the claiming process. <ul style="list-style-type: none"> <li>Example: We’ve noticed payors have been end dated and then added back a few times. This will cause the service charge to move to a non-billable payor or the client account. If a mistake was made in coverage and corrected, please check the following day to see if the service charge is back to the billable payor i.e., Medi-Cal or OHC. You would check this in the <b>Client Account (Client) screen</b>. If you see that the service is stuck at the non-billable payor, please reach out to EHR Billing.</li> </ul> </li> <li>If you are in doubt about updating Coverage, please reach Billing Team at <a href="mailto:BHS-EHRBilling@saccounty.gov">BHS-EHRBilling@saccounty.gov</a> to ensure that it doesn’t affect claiming.</li> <li>•</li> </ul>	Richard	2:15 pm	5 min
<b>ECM Claiming Update</b> <ul style="list-style-type: none"> <li>SmartCare Claiming Updates through August 2025 for HealthNet and Anthem and awaiting adjudication.</li> <li>ECM &amp; (SAC) Reports in SmartCare – reminder to run your routinely ECM and SAC reports in SmartCare to identify and address any potential issues.</li> <li>December 31, we will be wrapping up on providing ECM services.</li> </ul>	Mike	2:20 PM	10 min
<b>SmartCare Support Reminders</b> <ul style="list-style-type: none"> <li>Please reach out to us for support questions at <a href="mailto:BHS-EHRSsupport@saccounty.gov">BHS-EHRSsupport@saccounty.gov</a></li> <li>Notifying EHR Team and QM when staff are terminated</li> <li>Known Issues Listed on Website: <a href="http://dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx">dhs.saccounty.gov/BHS/BHS-EHR/Pages/Avatar.aspx</a></li> <li>Encrypting Emails with client information <ul style="list-style-type: none"> <li>Please make sure to encrypt all requests to our billing or support teams that have client information included.</li> </ul> </li> <li>Service Imports: <ul style="list-style-type: none"> <li>Please include EBP’s on your service imports when appropriate for each service that requires it</li> </ul> </li> </ul>	Justin	2:30 PM	10 min

<ul style="list-style-type: none"> <li>○ Going forward please include the following procedure codes in your service import. <ul style="list-style-type: none"> <li>○ Client Non-Billable Srvc Must Document</li> <li>○ Non-billable Attempted Contact</li> </ul> </li> </ul> <p><b>Inquiries Screen</b></p> <ul style="list-style-type: none"> <li>• Adding new clinician <b>ECT, Clinician</b> on 12/31/25</li> </ul> <p><b>Coverage Screen</b></p> <ul style="list-style-type: none"> <li>• Permission removed to delete Payors/Coverage</li> <li>• Known issue with end dating multiple payors with the same date</li> </ul>			
<p><b>SmartCare Reports</b></p> <ul style="list-style-type: none"> <li>• Release Items – see attachment document for updates</li> <li>• Discussion items: <ul style="list-style-type: none"> <li>a. Suggestion – Open clients without appointments</li> <li>b. Alternative – Open clients with NEXT appointments (including nulls)</li> <li>c. Other?</li> </ul> </li> </ul>	John	2:40 PM	10 min
<p><b>TADT Report</b></p> <ul style="list-style-type: none"> <li>• Program TADT Status (SAC)</li> </ul>	Dawn	2:50 PM	5 min
<p><b>CalAIM</b></p> <ul style="list-style-type: none"> <li>• The next ECM Provider meeting is 12/4/25 at 9:00 A.M. The Collaborative Resource RoundTable will resume in January 2026 via a Teams platform.</li> </ul>	Darlene	2:55 PM	5 min
<p><b>Training Updates</b></p> <ul style="list-style-type: none"> <li>• Training schedules posted through January 2026</li> <li>• ECM training removed from the EHR training schedule.</li> <li>• Training Resources: <ul style="list-style-type: none"> <li>○ SUPT Provider Admin updated <a href="#"><u>SUPT Provider Admin Training Slides 11.05.2025</u></a></li> <li>○ Service Corrections updated (In progress)</li> </ul> </li> <li>• Training Registration Form <ul style="list-style-type: none"> <li>○ Program Name field- as listed in SmartCare</li> </ul> </li> <li>• <b>New Training Requirement:</b> Direct Care at new Legal Entities – will be required to attend the Direct Care Staff live training. We would also like the contract monitors to attend these live training courses in case there are any questions that arise outside of the EHR trainers' scope to answer.</li> <li>• Next SUPT User Forum: Wednesday, Jan 28<sup>th</sup> @ 2pm <ul style="list-style-type: none"> <li>○ 2026 User Forum schedules are posted</li> </ul> </li> </ul>	Kat	3:00 PM	10 min

<p><b>New SmartCare Items or Issue Updates</b></p> <ul style="list-style-type: none"> <li>• <b>Permissions for editing services</b> <ul style="list-style-type: none"> <li>○ Permissions to override service detail for services not yet claimed were removed from all provider roles as of October 30, 2025, and a communication was sent out. If corrections to services <b>not yet</b> claimed are needed, please reach out to the Training and Support team at <a href="mailto:BHS-EHRSupport@saccounty.gov">BHS-EHRSupport@saccounty.gov</a> with the client ID, Date of Service, Procedure Code and the details that require correction to with the details and we will work with you to make the corrections. . The process for overriding service detail for claimed services will not change, please continue to follow the existing process of submitting Claims Corrections Spreadsheets for corrections to <a href="mailto:BHS-EHRBilling@saccounty.gov">BHS-EHRBilling@saccounty.gov</a></li> </ul> </li> <li>• It is not necessary to error out the service if details need to be changed, instead reach out to EHR Support to make those changes if the service hasn't claimed. <ul style="list-style-type: none"> <li>○ If we are unable to make corrections to the service for any reason and the service needs to be errored out, we will reach out to you. An example of such would be the request to change a procedure code which is tied to a different note type. In this circumstance, we would let you know to make a copy of the existing note before erroring out the service.</li> </ul> </li> <li>• <b>CalOMS</b> <ul style="list-style-type: none"> <li>○ We have started reporting CalOMS in small batches. We will soon be sending the errors received back from the state out to providers for corrections. If your CalOMS point of contact has been changed from what was originally provided to the EHR team, please reach out to us at EHRSupport.</li> <li>○ CalOMS Outside Provider List Page – <b>Used to report CalOMS for</b> clients that do not have Sacramento County MediCal</li> <li>○ This screen allows you to enter CalOMS data in SmartCare for the client, but you are not required to create the client or enroll them into your program. This prevents non-Medi-Cal clients from showing up on regular monthly reports.</li> <li>○ If interested in using the Outside Provider List Page screen, reach out to us at <a href="mailto:BHS-EHRSupport@saccounty.gov">BHS-EHRSupport@saccounty.gov</a> and we will set up time with you to go through the process.</li> <li>○</li> </ul> </li> </ul>	Kristi	3:10 PM	5 min
<p><b>Open Forum</b></p> <ul style="list-style-type: none"> <li>○ Staff had put in a CalOMS discharge and were able to put another discharge CalOMS with the same FSN number, and is that possible?</li> <li>○ Answer: Please send a secure e-mail to EHR Support along with the client ID, name of program, and admission date so we can research it.</li> </ul>	All	3:15 PM	15 min

## Program TADT Status (SAC)

Program Type drives the type of TADT pulled (MH, DMC OP or DMC Opiod (for NTPs))

Complete means: There is a Closure Date, There is a Closure Reason, The TADT is Signed

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 or Multiples, it flags yellow if Multiples, and one or more of those should be deleted

Start Date 6/1/2025 End Date 6/3/2025 Programs [REDACTED] TDAT Status None, Multiples, Started, Complete

View Report

1 of 1 Find | Next

Program TDAT Status

And 3 Other Programs

For Clients Enrolled Between 6/1/2025 and 6/3/2025

Program Name	Client Name	Client Id	Enrolled	Program Type	Overall TDAT Status	Days Pending	Is Urgent	First Req	First Offered	First Rendered	First FU Offered	First FU Rendered	Closure Date	Closure Reason
E [REDACTED]			06/02/25	MH OP	None	168								
E [REDACTED]			06/02/25	MH OP	None	168								
E [REDACTED]			06/02/25	MH OP	None	168								
E [REDACTED]			06/02/25	MH OP	None	168								
S [REDACTED]			06/03/25	MH OP	Started	167		05/29/25	06/10/25	06/10/25	06/23/25	07/09/25		
S [REDACTED]			06/03/25	MH OP	Multiples			05/13/25	05/22/25	05/22/25	06/03/25	06/11/25		
S [REDACTED]			06/02/25	MH OP	Started	168		06/02/25	06/05/25	06/05/25	06/12/25	06/12/25		
S [REDACTED]			06/03/25	MH OP	Started	167		05/13/25	06/03/25	06/03/25	06/03/25	06/26/25		
S [REDACTED]			06/02/25	MH OP	Started	168		05/15/25	05/30/25	06/05/25	06/12/25	06/12/25		
ZZ_A [REDACTED]			06/03/25	DMC OP	Complete			06/02/25	06/03/25	06/03/25			06/03/25	Other
ZZ_A [REDACTED]			06/03/25	DMC OP	Complete			06/02/25	06/03/25	06/03/25			06/03/25	Other
ZZ_T [REDACTED]			06/02/25	DMC Opiod	Started	168		06/02/25	06/02/25	06/02/25	06/03/25	06/03/25		
ZZ_T [REDACTED]			06/02/25	DMC Opiod	Started	168		06/02/25	06/02/25	06/02/25	06/03/25	06/03/25		

If the inquiry was flagged as “Urgent” that shows in the Is Urgent column

Is Urgent	First Req
Y	06/
Y	06/

## **Program Signed Assessments (SAC)**

Remove TADT (use above)

## **Active Client Eligibility (SAC)**

Fix issue with join logic to CustomClients that was dropping some clients without records

## **Discharge Detail Report (SAC)**

Fix service count logic when current admission does not include an “enrollment”

### **Discussion items:**

- 1- Appt based report
  - a. Suggestion – Open clients without appointments
  - b. Alternative – Open clients with NEXT appointments (including nulls)
  - c. Other?