

Agenda



Electronic Health Record (EHR) MH User Forum

Date: March 26, 2026

Time: 1:00 to 2:30 PM

Location: Virtual using Microsoft Teams

Facilitator: Kristi Duthler

Scribe: Alona Kozachenko

Attendees: (See sign-in sheet)

Topic	Presenter	Start Time	Length
<p>Welcome/Introductions</p> <ul style="list-style-type: none">• Agencies attended:• El Hogar• Hope Cooperative• SSYAF• POYS• UCD CAARE• BHS CAPS• BHS CST• BHS QM• APSS• Telecare• Pacific Clinics• BACS• MHTC• TPCP• CalWorks• APCC• Heartland• CRH• Dignity Health• Casa De Amparo• River Oak• Heartland• Capital Star• Guiding Our Youth• Not using test clients in live SmartCare environment• AI Note Takers – we will be removing any AI bots from the meeting.• Support/Training Registration and Billing Mailbox<ul style="list-style-type: none">○ Support: BHS-EHRsupport@saccounty.gov○ Training Registration BHS-EHRtrainingreg@saccounty.gov○ Billing BHS-EHRbilling@saccounty.gov	Kristi	1:00 PM	5 min

<p>Medi-Cal/Medicare Claiming/Fiscal Update</p> <ul style="list-style-type: none"> • Claiming Status Update – completed claims for January 2026 and are currently processing through February 2026 for services ready to be claimed. • Medicare update – completed claiming for January 2026 for services ready to be claimed. • Denial Report – run Claims Denial Report (My Office) to view the notes based of posted date. This report will show all denials, as well as the denial code. • Claims Correction Spreadsheet (CCS) – completed within 6 weeks from the date submitted. • Tip sheet on how to avoid submitting a duplicate CCS How to Avoid a Duplicate CCS Tip Sheet.pdf 	Lana	1:05 PM	10 min
<p>ECM Claiming</p> <ul style="list-style-type: none"> • SmartCare Claiming Updates – submitted claims through December 2025. • ECM (SAC) Reports in SmartCare – reminder to run your billing reports. • Reminder that Sacramento County is no longer providing ECM services as of 12/31/25, but we will continue to claim for previous months. Providers are still able to make corrections to services within 6 months from the service date. 	Mike	1:15 PM	5 min
<p>SmartCare Support Reminders</p> <ul style="list-style-type: none"> • Please reach out to us for support questions at BHS-EHRsupport@saccounty.gov • If you have any SmartCare issues, reach out to our team, and we ask that you do not reach out directly to CalMHSA as each County has different workflows and processes. • Notifying EHR Team and QM when staff are terminated. • Known issues and updates posted on website: Known Issues Spreadsheet <p>Common Support Questions Demo</p> <ul style="list-style-type: none"> • Clearing briefcase errors. 	Stacey	1:20 PM	10 min
<p>Non AB-133 (ASDMI) Screen and Demo</p> <p>The new form will replace the Coordinated Care Consent. Effective April 1st, the ASDMI form must be implemented. An informational memo regarding the ASDMI form will also be sent out this week. The current consent will remain valid until a new ASDMI consent form is completed.</p> <p>Non AB-133 (ADCMI) Screen Demo</p> <p>How to Complete the ASDMI - 2023 CalMHSA</p>	Christine Janes/ Stacey	1:30 PM	10 min
<p>Service Request Authorizations Screen</p> <ul style="list-style-type: none"> • Added 3 new values to the Auth Code dropdown <ul style="list-style-type: none"> ○ SB 785 OOC SAR ○ Initial MH SAR SB 785 	Justin	1:40 PM	10 min

<ul style="list-style-type: none"> ○ Reauthorization MH SAR SB 785 <p>Special Population</p> <ul style="list-style-type: none"> • Added New Value to the Special Population Type dropdown <ul style="list-style-type: none"> ○ DA Core <p>TADT: New Functionality Demo</p> <ul style="list-style-type: none"> • How to Error Out 			
<p>SmartCare Reports</p> <ul style="list-style-type: none"> • Release Items 	John	1:50 PM	10 min
<p>TADT</p> <ul style="list-style-type: none"> • Deadline to complete for NACT submission: <ul style="list-style-type: none"> ○ The deadline to complete all data for NACT submission is April 3rd. We will be submitting the data to the State on April 10th. ○ The reporting period for TADT data being submitted to the State is March 1st through March 31st. 	Dawn	2:00 PM	5 min
<p>Training Updates</p> <ul style="list-style-type: none"> • Training schedules posted through May 2026 • Training Resources: <ul style="list-style-type: none"> ○ MH Provider Admin updated 2/26/26 Practice Management ○ Service Corrections updated 2/25/26 Practice Management ○ Updated <ul style="list-style-type: none"> ▪ Service Authorization Request tip sheet Service Authorization Request Tip Sheet for Providers_02252026.pdf ▪ TADT tip sheet TADT Tip Sheet_02172026.pdf • Training Registration Form Updated Sac County BHS EHR Training Registration Form <ul style="list-style-type: none"> ○ Section 2- CalMHSA RX Support Staff • Reminders: <ul style="list-style-type: none"> ○ Use the most recent version of the training registration form (currently dated 3/17/26) ○ New Programs must be created in SmartCare prior to registering staff for training. <p>Next MH User Forum: Thursday, May 28th @ 1pm MH EHR User Forum Master Schedule 2026</p>	Kat	2:05 PM	10 min
<p>New SmartCare Items or Issue Updates</p> <ul style="list-style-type: none"> • Moving from Medication RX to CalMHSA RX April 1st <ul style="list-style-type: none"> ○ Reminder to Prescribers: reach out if you have not received an invitation to complete your identity proofing. 	Kristi	2:15 PM	5 min

<ul style="list-style-type: none"> ○ Two training sessions were held on 3/17 and 3/23. If you missed them, reach out, and we can provide recordings before going live. ○ If the identity proofing process is not completed, you will not be able to prescribe medications. 			
<p>Open Forum</p> <p>ASCOMI (Non AB-133) – Verbal Consent: Question: Is verbal consent acceptable for this form? Answer: Yes, verbal consent is acceptable. However, it must be accompanied by a progress note documenting the consent, and the form in SmartCare must be completed, indicating consent was given verbally.</p> <p>TADT Errors: Question: When should a TADT be errored out? Answer: A TADT can be errored out if it was created under the wrong CDAG, is a duplicate, has the wrong client, or contains similar errors. If the TADT is signed, it can be errored out. If it is still in progress, you must email our team to have it deleted.</p>	All	2:20 PM	10 min

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	12/04/25
██████████	██████████	██████████	11/21/25	MH OP	None	97					
██████████	██████████	██████████	11/21/25	MH OP	Complete		N	11/21/25	11/26/25	12/03/25	12/03/25
██████████	██████████	██████████	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?