Department of Health Services
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County of Sacramento

Memorandum

Date: July 10, 2025

To: Sacramento County Contracted Sober Living
             Environment/Recovery Residence Providers

From: Lori Miller, LCSW
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             Health Services, Substance Use Prevention and Treatment

Subject: Accessing SmartCare for Sacramento County Contracted Sober
             Living Environment/Recovery Residence Providers

As part of Sacramento County's efforts regarding reporting behavioral health services and to ensure consistency for documentation, all Sober Living Environment (SLE)/Recovery Residence Providers will begin using the County's Electronic Health Record (EHR) system, SmartCare.

When are Providers required to use SmartCare?
- All SLE/Recovery Residence Providers that are participating in the Behavioral Health Bridge Housing (BHBH) Substance Use Prevention and Treatment (SUPT) Flexible Funding Pool.
    - Anticipated "Go-Live" Date: August 1, 2025.
- All remaining SLE/Recovery Residence Providers contracted with Sacramento County.
    - Anticipated "Go-Live" Date: FY 2025–2026 Quarter 2 (October 1, 2025).

Which staff are eligible to register to use SmartCare?
- Direct Service Staff (e.g., House Manager, Alumni/Senior Resident, or Peer Support Specialist): These staff work directly with and provide support to the members residing at the SLE/Recovery Residence Program and are often the most familiar with the member's daily progress and needs. If registered with Continuous Quality Improvement Quality Management (CQI-QM), these staff

may be ideal for completing documentation requirements within SmartCare.

- Administrative Staff (e.g., Program Director, Program Billing Staff, etc.): These staff typically do not provide direct support to members but may complete the required documentation within SmartCare. This may be ideal when direct service staff have limited time to document. Administrative staff may also be those individuals that oversee the SLE Program.
- It is recommended to assign documentation responsibilities based upon your Program's structure and day-to-day operations. Also consider registering multiple staff to use SmartCare to ensure continuity of documentation, coverage during absences, and flexibility in your workflow.

Minimum Required SmartCare Elements:
- All SLE/Recovery Residence Providers must plan to enter in the minimum required SmartCare Elements.
- Refer to Attachment A for the Minimum Required SmartCare Elements for SLE/Recovery Residence Providers.

Steps to Prepare for SmartCare Access:

1. To gain access to SmartCare, each agency must select an Authorized Approver <u>and</u> submit an EHR Account/Training Registration form for each of their staff who will be documenting within SmartCare.
   a. Visit [Behavioral Health Services (BHS) EHR Training & Schedule](#) webpage and review the [Authorized Approvers Manual](#) for guidance on selecting an Authorized Approver.
   b. To register for SmartCare training, complete and submit the [EHR Account/Training Registration Form](#) for each staff who will be using SmartCare. Please refer to the [Authorized Approvers Manual](#) to determine which training would be most appropriate to the staff's role.
      <u>Admin</u>: Admin training is for non-clinical users such as administrative or billing staff. This training does not grant access to most clinical documentation.
      i. <u>Direct Care Staff</u>: Direct Care Staff are licensed and non-licensed clinicians that will be providing services directly to clients. These users will need to be registered with BHS CQI-QM and the EHR Team whether they will be using SmartCare or not.

1. If you are a Provider that has never entered within SmartCare, the plan is to offer a live Direct Care Staff Training close to your anticipated go live date.

   ii. Once the EHR Account/Training Registration Form has been approved, the new user will be given instructions on how to create an account on the [CalMHSA Learning Management System (LMS)](#) portal. All staff are required to complete the CalMHSA (LMS) required training videos and knowledge checks within the portal.

   c. Please allow at least 5 business days for a new user account to be created once all information is received.

   d. Staff are required to complete all SmartCare training prior to documenting within the system.

   e. If you are having trouble accessing or completing the process for selecting an Authorized Approver or the EHR Account/Training Registration Form, please reach out to your assigned Contract Monitor for assistance.

2. All staff assigned to document into SmartCare must complete the registration and credentialing process with CQI-QM.

   a. To register staff with CQI-QM, visit [BHS Forms & Documents](#) webpage.

   b. Under Staff Registration and Credentialing Forms, complete the following forms for each staff member that you wish to register for your agency:
      - [Attachment A1 - QM SUPT Staff Reg Form](#)
      - [Attachment B - QM MHP-SUPT Staff Check List](#)
      - [Attachment C - SSN Consent Form](#)
      - Select the form that best fits the staff's role (e.g., for alumni or senior residents, the [Attachment J - AOD Counselor Application](#) may be applicable).

   c. Submit the completed forms and any required supplemental documents to QMRegistration@SacCounty.gov.

   d. Please allow at least 10 business days for processing.

   e. Staff are required to complete the registration and credentialing process prior to documenting within SmartCare.

   f. If you are having trouble accessing or completing the Staff Registration and Credentialing Forms, please reach out to your assigned Contract Monitor for assistance.

3. All staff must be maintained on the CQI-QM Staff Roster.

   a. Refer to Attachment B for the CQI-QM Staff Roster.

   b. This is required to be completed and submitted to BHSQMStaffReg@saccounty.gov by the 5th of each month.

4. All staff who will document into SmartCare must complete the required BHS SUPT Documentation Training.
   a. To register for BHS SUPT Documentation Training: CQI-QM will provide a Registration Form with available training dates and times in an upcoming separate email.
      i. SLE/Recovery Residence Providers that have opted in to BHBH will complete the Registration Form that will include BHS SUPT Documentation Training dates for this month.
      ii. SLE/Recovery Residence Providers who are not participating in BHBH, will complete the Registration Form closer to their go live date. Additional training dates will be provided.
   b. Complete and submit the registration form to QMTraining@SacCounty.gov.
   c. CQI-QM Staff will confirm with staff that their registration has been received.
   d. It is recommended to add the training date to your calendar (note that login details will be emailed 1–2 days prior to the scheduled training).
   e. Staff are required to complete BHS SUPT Documentation Training prior to documenting within SmartCare.
   f. If you have questions or are having trouble completing the Registration Form, please reach out to your assigned Contract Monitor for assistance.

We appreciate your partnership as we continue to work together to strengthen service delivery and data integrity for individuals in SLE/Recovery Residences. To support your preparation, please use the SmartCare Readiness Checklist below as a quick reference for ensuring your Program is ready for access and documentation.

SmartCare Readiness Checklist

Administrative Preparation:
Determine your Program's "Go-Live" date:
☐ August 1, 2025: BHBH SUPT Flexible Funding Pool participants
☐ October 1, 2025: All other SLE/Recovery Residence Providers

Identify which staff will document in SmartCare:
☐ Direct Service Staff (e.g., House Manager, Alumni/Senior Resident, Peer Support Specialist)
☐ Administrative Staff (e.g., Program Director, Program Billing Staff, etc.)

Minimum Required SmartCare Elements:
☐ All SLE/Recovery Residence Providers must plan to enter in the minimum required SmartCare Elements.

For SmartCare Access:
☐ Select an Authorized Approver for the agency.
☐ Submit the EHR Account/Training Registration Form for each staff who will be using SmartCare.

For Staff Registration and Credentialing:
☐ Submit the following Staff Registration and Credentialing Forms for each staff who will be documenting within SmartCare:
  - Attachment A1 - QM SUPT Staff Reg Form
  - Attachment B - QM MHP-SUPT Staff Check List
  - Attachment C - SSN Consent Form
  - Select the form that best fits the staff's role (e.g., for alumni or senior residents, the Attachment J - AOD Counselor Application may be applicable).
☐ Submit the CQI-QM Staff Roster to BHSQMStaffReg@saccounty.gov prior to go live and monthly thereafter.

For SUPT Documentation Training:
☐ Once BHS SUPT Documentation training dates and registration information is received from CQI-QM, submit and complete the Registration Form for each staff who will be documenting within SmartCare.

*Please note that Program staff must complete all required steps prior to accessing/documenting within SmartCare.