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| <b>To:</b>   | <b>BHS Service Providers and Stakeholders</b>   |
| <b>From:</b> | <b>Behavioral Health Services</b>   |
| <b>Date:</b> | <b>January 9, 2026</b>  |
| <b>Title</b> | <b>Updated Process for Requesting Client Charts and ROI's with CCBH System Retirement</b> |

The Behavioral Health Services (BHS) Electronic Health Record (EHR) Support Team is committed to ensuring a smooth transition as we retire the Legacy Cerner Community Behavioral Health (CCBH) system after January 1, 2026.

As a reminder of what was shared in previous communications:

- The legacy solution, Cerner Community Behavioral Health (CCBH) is no longer available from the vendor. Access will no longer be provided to this system.
- Client demographic information from the legacy systems (CCBH & SanWITS) has been made available in the current SmartCare solution.
- Most clinical documentation beginning in Sept of 2022 is available in the SmartCare solution. This includes Continuity of Care documents, Medications, Diagnosis, recent Progress Notes and Assessments.
- Future projects will include potential access to clients' Continuity of Care Documents (CCD), enrollment history and shared data through alternate solutions and the Health Information Exchange (HIE).

An issue was identified related to the visibility of client closed enrollment/assignment history prior to 2022 within SmartCare. We understand the significance and are working diligently with our vendors to identify a long-term solution.

- In the interim, programs can contact Optum to request a client roster report when needed.

As part of this transition, please note the following updates:

- Optum Support Desk will now handle all requests for client charts, and Release of Information (ROI) documents for contracted programs.
- The County operated program process for chart requests has not changed and will continue to be processed through HIMs.
- New request forms are available on the following webpage: [SMH & DMC-ODS Health Plans](#), Navigate to "Forms" and select MH.
- Completed forms can be emailed to: [SDHELPDESK@OPTUM.COM](mailto:SDHELPDESK@OPTUM.COM).
- An FAQ document is also available on the following webpage: [SMH & DMC-ODS Health Plans](#), Navigate to "Forms" and select MH.
- For questions or assistance, please call the Optum Help Desk at 800-834-3792.

Thank you for your cooperation as we work to optimize our EHR processes. Additional updates will be shared in future communications.

BHS EHR Support Team

**For More Information:**

- Contact your Contracting Officer's Representative (COR) or
- Optum Support Desk at 800-834-3792
- EHR support mailbox at [BHS\\_EHRSupport.HHSA@sdcounty.ca.gov](mailto:BHS_EHRSupport.HHSA@sdcounty.ca.gov)