

To:	BHS Service Providers and BHS All-Staff
From:	Behavioral Health Services
Date:	September 12, 2025
Title	SmartCare – Records Requests Past 365 Days

Summary

The County of San Diego BHS manages an electronic health record (EHR) for the BHP County and contracted providers. The EHR holds client's protected health information (PHI), which is accessible by County and contracted providers to improve coordination of care across the Behavioral Health Plan (BHP) System of Care. This notice is specific to contracted providers only.

When a client (or the individual with authority of the record), or a third party request access to or a copy of their record, all programs shall comply with applicable privacy laws and reasonably ensure the identity of the requester before releasing client information. When accepting an authorization form from an outside source, programs shall reasonably ensure the authorization is valid and verify the identity of the requester before providing client information.

Review [OPOH - Organizational Providers Operation Handbook - 08.21.25.pdf](#) or [SUDPOH - updated August 2025.pdf](#) for more information regarding requests for records.

Process Update

Contracted Providers have access to a client's chart for 365 days post-discharge to respond to record requests accordingly. Once that timeframe expires, a request will need to be made via the Optum Help Desk to access documents past one year. Optum will grant access for 72 hours, closing the record again after that time.

DAYS	HOURS	CONTACT
Monday - Friday	6:00 am to 6:00 pm	1-800-834-3792

Reminders

The CalMHSA site has instructions on Release of Information processes:

- [How to Document a Release of Information \(Authorization to Disclose Confidential Information\) - 2023 CalMHSA](#)
- [How to Revoke a Standard Release of Information/Authorization to Disclose Information - 2023 CalMHSA](#)
- [How to Determine What Disclosure Authorizations \(Release of Information\) the Client has Signed- 2023 CalMHSA](#)

For More Information:

- Contact: QIMatters.HHSA@sdcounty.ca.gov