



COUNTY OF SAN DIEGO
BEHAVIORAL HEALTH SERVICES

SmartCare User Group

**County of San Diego
Behavioral Health Services**

October 19, 2026

Meeting Goals



Transparency



Engagement



Inclusion

Meeting Agenda

- Meeting Goals
- Updates
 - Clinical
 - MIS
 - Data Sciences
 - Data Quality
 - Billing
- Q&A



Who to Contact?



Who to Contact	How to Contact
SmartCare System issues: i.e. glitches, functionality issues, pop-up errors	CalMHSA various options: 1. Connect via Live Chat (M-F 8:00am – 5:00pm) a. 2023.calmhsa.org b. Access when logged in to the SmartCare EHR 2. Submit a ticket (M-F 8:00am – 5:00pm) a. 2023.calmhsa.org b. Access when logged in to the SmartCare HER 3. After Hours support (only available for system outages) a. Call (916) 214-8348
Password Resets and Account Unlock	Call 1-800-834-3792 (Available daily from 4:30am – 11:00pm including weekends and holidays)
SmartCare ARF submission and any access related issues or questions	BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
SmartCare support questions that cannot be addressed by the CalMHSA Support Desk should be directed to MIS	BHS_EHRSupport.HHSA@sdcounty.ca.gov
For questions related to documentation guidelines, DHCS regulations or policy	QIMatters.BHS@sdcounty.ca.gov
Billing Issues or Questions that cannot be addressed by the CalMHSA Help Desk	Mental Health: MHBillingUnit.BHS@sdcounty.ca.gov MH Billing Line: 619-338-2612 SUD: SUDBillingUnit.BHS@sdcounty.ca.gov SUD Billing Line: 619-338-2584
Reports and Data Questions	BHS-DataScience.HHSA@sdcounty.ca.gov

Clinical Updates

Jill Michalski,

EHR Team, Clinical Lead
jill.Michalski@sdcounty.ca.gov

Eileen Quinn-O'Malley,

EHR Team, Chief, Agency Operations
Eileen.quinn-omalley@sdcounty.ca.gov



Eleos Timeline



OCT 19	Training Registration Reminder Email from Eleos	PLANNED
OCT 20	End-to-End Testing	PLANNED
OCT 26	End User Accounts Activated – Dashboard & Mgmt. Hub Access	PLANNED
OCT 26	Non-SSO End User Emails Triggered from Eleos	PLANNED
OCT 26	Welcome & Academy Emails Triggered from Eleos	PLANNED

GO-LIVE WEEK

OCT 27-30

SMARTscribe + LQA Training & Go-Live

CONFIRMED

Eleos Updates Training & Go Live



- Approved SMARTScribe Users should register for Eleos Live Virtual Training
 - [SMARTscribe Training Signup — San Diego County calMHSA](#)
 - You will receive a unique training link after registering for training
 - You will need to set up the **extension** before your training session using the provided link: [Eleos Installation Wizard](#)
 - Eleos trainers will walk you through the log in process at the start of your training session
- Self-paced training through Eleos Academy requires login and password
 - Account information for login and password will be sent via email by Eleos on 10.26.26 for access to Eleos Academy and SMARTScribe platform
- Complete CalMHSA Baseline Provider Satisfaction Survey prior to training and Go Live date

SmartScribe Training Registration



https://sd-eleos-smartscribe-signup.loveable.app

Join a live session and bring all your questions — our team will be there to answer them.

October 27 – 30, 2026 Virtual sessions via Zoom

Search by session, date, or time

Showing 16 of 16 sessions

SMARTscribe Training

In this session you'll get logged in, learn how to capture a real session, and build notes using Text and Voice Summary with hands-on practice for each. You'll also set up SMARTscribe on your phone for field work, get language for introducing SMARTscribe to your clients, and know exactly who to contact when something comes up.

Talking to Clients about SMARTscribe

Introducing SMARTscribe to a client doesn't have to be awkward. We'll work through the three conversations providers say are hardest: the client who's hesitant about the technology, the parent and youth in the room together, and the client worried about who sees their notes. You'll have opportunity to practice gathering consent and building confidence since you won't be trying it for the first time with your clients.

Virtual Spaces left

SMARTscribe Training

October 27, 2026
9:00 AM PT - 3.5 hours
San Diego County CalMHSA behavioral health staff

Virtual SMARTscribe training. Join via Zoom at the scheduled start time.

Sign up

Virtual Spaces left

SMARTscribe Training

October 27, 2026
1:00 PM PT - 3.5 hours
San Diego County CalMHSA behavioral health staff

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SMARTscribe Training

October 27, 2026
1:30 PM PT - 3.5 hours
San Diego County CalMHSA behavioral health staff

Virtual SMARTscribe training. Join via Zoom at the scheduled start time.

Sign up

Virtual Spaces left

SMARTscribe Training

October 28, 2026
9:00 AM PT - 3.5 hours
San Diego County CalMHSA behavioral health staff

Virtual SMARTscribe training. Join via Zoom at the scheduled start time.

Sign up

Virtual Spaces left

SMARTscribe Training

October 28, 2026
1:30 PM PT - 3.5 hours
San Diego County CalMHSA behavioral health staff

Virtual SMARTscribe training. Join via Zoom at the scheduled start time.

Sign up

CalMHSA San Diego & Eleos Documentation Training (Cohort 2)

Date & Time Oct 27, 2026 01:30 PM in [Pacific Time \(US and Canada\)](#)

Meeting Registration

First Name *

Last Name *

[REDACTED]

[REDACTED]

Email Address *

[REDACTED]@sdcounty.ca.gov

Information you provide when registering will be shared with the [account owner](#) and host and can be used and shared by them in accordance with their Terms and Privacy Policy.

☐ I'm not a robot



AI Consent Requirements



Ambient AI Use Consent Reminders

- AI Consent Form is required to be completed and signed by client before utilizing SMARTScribe
 - SMARTCare Consent to Use Artificial Intelligence (AI) Ambient Scribe electronic document and downtime form available
- Verbal notification and client consent to use AI Scribe required prior to each session
 - *“The Client has consented to the use of ambient listening AI at the start of this service and understands their right to decline or discontinue the use of ambient listening AI at any time during this service. The Client has been provided an explanation of SmartScribe Ambient Listening AI technology and signed the Consent to use AI. This note was drafted with assistance from Eleos Ambient Listening AI. The treating clinician reviewed and finalized all content.”*
 - Check box will added to progress notes prior to Go Live.

SmartPortal Updates (Intelichart)



Current implementation steps to be completed by 11/23/26:

- Identify SMARTPortal users and providers for staff template in SmartPortal
- Define notification options to be set up in the Portal
- Identify client-facing documents to be built in Portal and mapped to SMARTCARE

Pending actions:

- CalMHSA and EHR Project Team document and forms mapping
- Workflow development and testing
- End User Training

Go Live Timeline: March 2027.

- San Diego and Santa Cruz will be the first SMARTCare counties to implement SMARTPortal

Connex (Interoperability) Updates



- ADT Exchange
 - Developing ADT exchange agreements for bi-directional data exchange with MCPs: Kaiser, Blue Shield, Molina, Community Health Group.
 - Data Sharing Agreement (DSA) with San Diego Health Connect (HIE)
- Restricted Client List – Data Ingestion from SmartCare to Connex
 - Review and approval of restricted clients from legacy system (Data Archive Project) pending
 - CalMHSA will begin ingesting clinical data from SmartCare into Connex
 - Review of access controls framework for MH/SUD information and CDAG guardrails leveraging ASCMI
- Validation of clinical data, workflow review
 - Initial communications to clients to inform of opt out process prior to roll out
- Closed Loop Referral and Prior Authorization API
 - Phase 1 – initial pilot with single service line TBD
 - mapping current referral workflows for Prior Authorizations
 - Phase 2 - Closed Loop Referrals



Reminder – Client Legal Name vs Chosen Name Entry/Display in SmartCare

- When creating new client in SmartCare, you **must** use their legal name and information as it aligns with their Medi-Cal information.
 - Chosen name can be entered and configured to display in the Client Information Screen under the Alias Tab
- New Configuration shared in May SC User Group to enter and display either the client's chosen name across SmartCare Screens instead of their legal name in the following screens:
 - Legal name will still be configured for billing claims and required signatures on documents
 - @ icon will appear by client name – hovering over the @ will display the alternate name (either legal or chosen)
- Do **NOT** create a new client or change existing client legal name when a client requests to be identified by a preferred/chosen name.

Entering Chosen Name to display



Chosen Name must be entered in Client Information (Client) Screen under the **Alias Tab**

- Add Chosen First and Last Name under “Client Alias” section
- Select type as “Alias”
- Check the “Chosen Name” checkbox
- Click “Insert”
- Click “Save”

A screenshot of the "Client Information" screen in a software application. The "Aliases" tab is selected, indicated by a red arrow. The "Client Alias" section contains input fields for "First Name" (labeled 1, containing "Wilma"), "Middle Name", and "Last Name" (labeled 2, containing "Wobblestone"). Below these is a "Type" dropdown menu (labeled 3) with a list of options: "Alias", "Nick Name", "Preferred Name", and "Former Name". The "Alias" option is highlighted. To the right of the dropdown are checkboxes for "Allow Search" and "Chosen Name" (labeled 4, which is checked). At the bottom right of the form are "Insert" and "Clear" buttons. Below the form is a "List of Alias" table with columns: First, Last, Middle Name, Type, Allow Search, and Chosen Name. The table is currently empty, displaying "No data to display".

Management Information Systems (MIS)

Ashley Chamberlain

SmartCare Support:

BHS_EHRSupport.HHSA@sdcounty.ca.gov

SmartCare Access/ARFs:

BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov



Staff Administration



Reminders:

- Modification ARFs must have a reason for the modification noted in the comment section
- All clinicians must complete Section II of the ARF for SmartCare access

Coming Soon:

- Revised ARF to include Eleos access option
 - SmartScribe only is currently the only available option
 - Your program must have an AI policy attestation on file with BHS
- Support and Access email addresses changing – new email addresses to be shared upon go-live

System Administration



My Reported Errors

- All requests to mark services in error must be submitted through My Reported Errors. This includes corrections for residential bed day services.
- The Data Quality team processes all error requests.

MIS Support

- Corrections related to client program assignments and CALOMS should continue to be submitted to BHS_EHRSupport.HHSA@sdcounty.ca.gov (non-service errors).

System Administration



CalOMS

- Client program assignment dates must align with the corresponding CalOMS documentation.
- The **CoSD CalOMS and Program Assignment Dates Mismatch Report** is available to identify discrepancies. The report displays all instances where program assignment dates do not correspond with the CalOMS admission and/or discharge documentation.

System Administration



Reports Available:

- **CoSD CalOMS 331/342 Error Report** – “If the client’s treatment services are being delivered on behalf of another county, what is the code of the county for which the services are being performed?” **The only acceptable value is “None or not applicable.”**
- **CoSD CalOMS and Program Assignment Dates Mismatch Report** – The client program assignment dates do not correspond with the CalOMS admission and/or discharge documents.
- **CoSD CalOMS Signed Admission Missing Report** – An admission has not been entered in SmartCare, or the admission is In Progress status.
- **CoSD CalOMS Annual Update Due Date Report** – Shows clients that have been active for 10 months and require an annual update.
- **CoSD CalOMS Data Report** – Displays key CalOMS admission and discharge fields for review, similar to the report that was available in SANWITS.

Data Science (DS) Reports

Derek Kemble

SmartCare Reports:
BHS-DataScience.HHSA@sdcounty.ca.gov



Report Training and Resources



Current Efforts

[Optum SmartCare Training](#)

[SmartCare Help Desk Support](#)

[SmartCare ARF: Treatment Programs](#)

Centralized E-mail support:

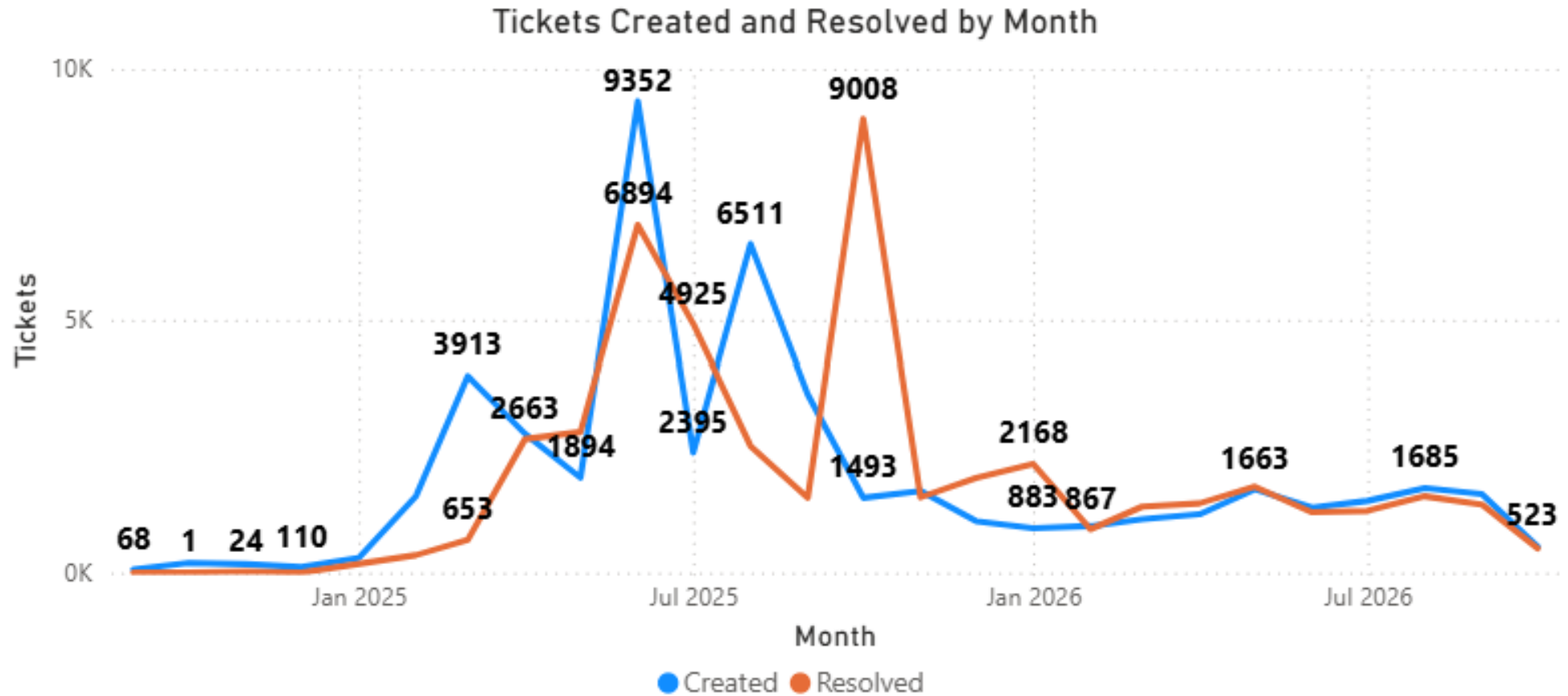
BHS-DataScience.HHSA@sdcounty.ca.gov

Data Quality Error Corrections Team

Robert Bechtol



Tickets by Created Date



Tickets by Created Date

Month/Year	Total Errors	Resolved Errors
1 July, 2026	1432	1039
1 August, 2026	1685	1485
1 September, 2026	1566	1344
1 October, 2026	523	483
Total	5206	4351

Tickets by Date of Service

2,458

Total Tickets

2,149

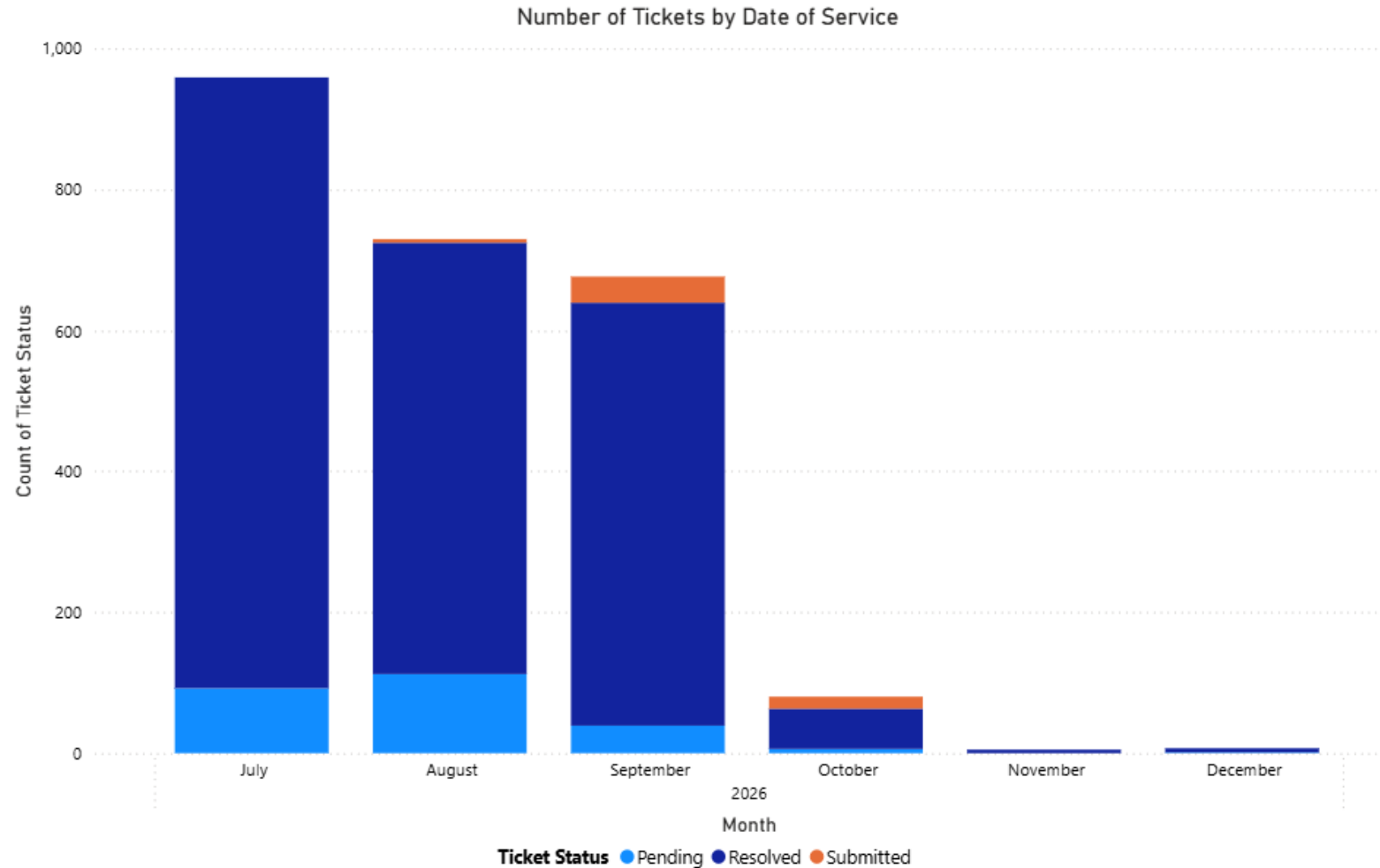
All Resolved

59

All Submitted

250

All Pending



Tips for Quick Resolution

- Client ID
- Service ID
- Clinician Name
- Program Name
- Date of Service
- Document ID
 - Description of Issue why document needs to be errored out
 - Document Name/Title
 - Effective Date

BHS Billing Unit Announcements

Tess Bugay, Medical Claims Manager
Carmen Saline, Admin. Analyst III



CoSD BHS Billing Email Address and eFax



Please send all MH and SUD billing communications to these **new BHS Billing email addresses:**

- **MH billing and billing-related emails to:** MHBillingUnit.BHS@sdcounty.ca.gov
- **ADP or SUD billing and billing-related emails to:** SUDBillingUnit.BHS@sdcounty.ca.gov

Electronic Fax (eFax)

MHBU: 858-467-9682

SUDBU: 619-236-1418

The BHS Billing Unit has deactivated the old email addresses, and they are no longer monitored.

- MHBillingUnit.HHSA@sdcounty.ca.gov (MH)
- ADSBillingUnit.HHSA@sdcounty.ca.gov (SUD)

Client Information and Medi-Cal Billing



The client's name in SmartCare Client Information must match exactly what is on file in the state's Medi-Cal systems (such as Medi-Cal Provider Portal, MEDSLITE, MEDS, or the Benefits Identification Card). Failure to align the name formatting precisely may result in the Medi-Cal plan not being added automatically for a full scope Medi-Cal client's coverage and time plans in SmartCare when the MMEF file is uploaded, resulting in charges dropping to 9999.

Key Consequences of a Mismatch:

When the **Monthly Medi-Cal Eligibility File (MMEF)** or automated eligibility checks run, the system attempts to reconcile the internal SmartCare records with the state's **MEDS** (Medi-Cal Eligibility Data System) database.

- **The Matching Logic:** The system typically uses a strict multi-point match, including **First Name, Last Name, Date of Birth (DOB), and Social Security Number (SSN) / Client Index Number (CIN)**.
- **The Risk of Formatting:** Even minor discrepancies such as a missing hyphen, an extra space, a middle initial included in the first name field, or a suffix (like Jr. or III) placed incorrectly—will cause the matching algorithm to fail.

Medi-Cal Claim Denials



- BHS Programs should run and review the CalMHSA 814 Claims Denial Contractor Report (My Office) monthly or as often as needed.
- For guidance on CM 814 Report, please refer to the [CALMHSA 814 – Claims Denial Contractor Report \(Medi-Cal Only\)](#) document published by the BHS Billing Unit in San Diego Optum Resources [SMH & DMC-ODS Health Plans](#)- Billing section.
- Currently, the Adjustment Reason Code "143" is described as 'Claim Filed Late' in the CalMHSA 814 Report. But it doesn't signify "late claim filing as CARC 143 means a portion of payment is deferred". CalMHSA has informed that changes are being made to the 143 description. BHS BU will provide an update once the change has gone into effect. Feel free to reach out to the BHS BU for any additional assistance.
- Please reach out to your designated BHS billing team if you need further clarification or assistance with resolving denied claims.

CARC & RARC



- The CARC (Claim Adjustment Reason Code) and RARC (Remittance Advice Remark Code) are standardized codes provided by insurance companies to explain why a medical claim was denied, reduced, or paid differently than billed.
- CARC and RARC are included in the electronic remittance advices (ERAs) or explanations of benefits (EOBs) that the BHS Billing Unit posts to SmartCare.
- The CARC and RARC tables are posted on the BHS Optum Billing resources website for your reference.
 - MH CARC and RARC
 - SUD CARC and RARC

Retroactive Medi-Cal



- As of October 2026, a feature has been configured in SmartCare to update current and historical Medi-Cal coverage per the MMEF (Monthly MEDS Extract File). When a new MMEF provided by DHCS is imported into SmartCare by the BHS Billing Unit at the beginning of each month, SmartCare will now update the Medi-Cal DMC and Medi-Cal MH Coverage Time Spans on the Client Plans screen based on a client's eligibility for the current month **and** the previous 12 months.
- As a result of configuring this feature in SmartCare, programs may notice a considerable reduction in the number of charges displayed when running the CoSD Charges/Claims Report and filtering by the "9999" Coverage Plan. This is expected and desired.
- For any other inquiries related to 9999, especially if you're aware that the client is Medi-Cal eligible, please reach out to your assigned BHS billing team.

For further questions: contact QIMatters.HHSA@sdcounty.ca.gov

Or go online for more information at:
OptumSanDiego.com → SMH&DMC-ODS Health Plans →
SmartCare Tab

Next Meeting: Monday, November 16, 2026, 11:00am - 12:00pm