New Contractor Orientation Resources - FY 26-27

The resources listed below are for Behavioral Health Plan (BHP) and Drug Medi-Cal Organized Delivery System (DMC-ODS) Providers and other County funded programs

Communications & Trainings

BHS Email Communications- Program staff can subscribe to the GovDelivery platform to receive BHS communications that go out to the system of care such as meeting notifications (e.g. QIP, SmartCare User Group, etc.), Information Notices, UTTMs (Up to the Minute Monthly Newsletters), BHINS, OPOH Updates, Upcoming Trainings (e.g. Audit Leads, Progress Note Practicum), etc.

- The BHS GovDelivery Flyer includes step by step instructions to subscribe.
- **To receive these notices as well as other important meeting invites and communications**: Specialty Mental Health Services & SmartCare

- Progress Notes Practicum Training – Quarterly
- Audit Leads Practicum Training – Quarterly
- Incident Reporting- A webinar is available on the Optum website > *Incident Reporting* tab
- **Quality Improvement Meetings-** Held virtually on the last Wednesday of every month from 1pm – 3pm. See the UTTM for further details.
- SmartCare User Groups – Monthly

BHS Quality Management (QA) Leadership Team

Administrator, QA Unit: Tabatha Lang- Tabatha.Lang@sdcounty.ca.gov

BHPC EHR Project Lead: Jill Michalski- Jill.Michalski@sdcounty.ca.gov

MH QA Program Coordinator: Makenna Lilya- Makenna.Lilya@sdcounty.ca.gov

MH QA Supervisor: Rachel Fuller- Rachel.Fuller@sdcounty.ca.gov

MH QA Supervisor: Dawn Jennings- Dawn.Jennings@sdcounty.ca.gov

MH QA Supervisor: Kristi Jones - Kristi.Jones@sdcounty.ca.gov

MH QA Supervisor: Elaine Mills- elaine.mills@sdcounty.ca.gov

SUD QA Program Coordinator: Nikki Watkins - Nikki.Watkins@sdcounty.ca.gov

SUD QA Supervisor: Diana Daitch Weltsch - Diana.Daitch@sdcounty.ca.gov

SUD QA Supervisor : Glenda Baez - Glenda.Baez@sdcounty.ca.gov

QA Analyst Program Coordinator: Erin Shapira- Erin.Shapira@sdcounty.ca.gov

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Important Contacts

- **QI Matters**: QIMatters.BHS@sdcounty.ca.gov- Primary email for the QA department. Staff are available for questions and consultation regarding various documentation and quality assurance issues.

- **SmartCare system issues (glitches, functionality, pop up errors):** CalMHSA Help Desk

- **Support for questions that CalMHSA Help Desk can't address/resolve** (i.e. program / system changes, corrections or deletions): BHS_EHRSupport.HHSA@sdcounty.ca.gov

- **Billing issues / questions:** MHBillingUnit.BHS@sdcounty.ca.gov

- **Access issues/questions, SmartCare ARF submissions:** BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov

- **Questions related to documentation, guidelines or policy:** QIMatters.BHS@sdcounty.ca.gov

- **Questions or requests regarding reports:** BHS-DataScience.HHSA@sdcounty.ca.gov

Other County Contacts

- Access and Crisis Line (ACL) - Phone: (888) 724-7240
- Claim Submission- Fax: (877) 364-6945
- County Health Information Management Dept. (HIMD): (619) 692-5700 Option #3 (Medical Record Requests)
- County of San Diego BHS Administration: (619) 563-2700
- County of San Diego Ethics Hotline: (866) 549-0004

Procedure Codes & Policies

- CalMHSA Procedure & Service Code Grid

- Specialty Mental Health Service Table- FY 26-27

Privacy Incident Reporting and other Privacy Resources

- All privacy incidents are reported directly through the HHSA Compliance Office online portal - HHSA Compliance Office

Behavioral Health Information Notices (BHINs)

- BHIN 25-020
- BHIN 23-068
- BHIN 26-002

Billing & Service Code Resources

- Financial Eligibility and Billing Manual

- DHCS CalAIM References and Manuals – Service Tables, Billing Manuals, Medi-Cal Behavioral Health Fee Schedules

- CalMHSA Procedure & Service Code Grid

- CalMHSA Scope of Practice Matrix Appendix III (p.39)

Billing Corrections in SmartCare

- **Optum > SMH & DMC-ODS Health Plans > SmartCare Tab > Billing Section**
- Clearing CoSD Service Error Report (My Office)
- Payment Recovery Form
- Service Note Errors and How to Resolve (CalMHSA)
- How to Report an Error (CalMHSA)
- OPOH Section Q

Online Resources

Optum San Diego Website- SMH & DMC-ODS Health Plans **&** CalAIM for BHS Providers

1. SmartCare Tab - Various resources, tools, guides related to SmartCare functionality, reporting, and billing needs. ‘
    a. Workflows: Optum Website> SmartCare tab> Workflows & Documentation
2. Communications – Memos, info notices, and other communications from BHS, QA and DHCS
3. Beneficiary - Resources and materials related to member rights and is setup based on different state requirements.
    a. All COSD member materials are available in electronic format. The order form to request hard copies of Behavioral Health Plan Informing Materials is available online**.**
4. NOABD - Templates and resources that provide members with required information about their rights under the Medi-Cal program.
5. Incident Reporting- Trainings, FAQ/ Tip sheets and forms for CIRs, NCIRs, ROFs and RCAs.
6. Up to the Minute (UTTM) - QA publishes a monthly newsletter to inform providers of important changes to regulations and/or requirements. This is one of the main tools for providing information to the system of care.
7. Training- Required CalAIM and SmartCare Training
    a. Required SmartCare Trainings: CalMHSA website
8. Billing- PRF forms, Assignment of Benefits (AOB), Links to billing manual and service tables.
9. UCRM- Form-fill versions of all EHR forms that make up the medical record and explanation sheets.

10. OPOH - Organizational Providers Operations Handbook -A broad source of information for all topics involved in managing a program within the County of San Diego. The most current version is always found on the OPTUM San Diego Website > OPOH tab.

11. MH Resources - Specific service line documents (i.e. ACT/FACT, STRTP), various resources

12. Manuals- MHP Contract, CAPS Handbook, LPS / Inpatient Operations Handbook, Outcome measures resources

13. Monitoring- Forms/ tools for all medication monitoring as well as the FY QAPR tool and program attestation

14. Forms

15. Indian Health Care Providers (IHCP)

16. Lanterman-Petris-Short (LPS)

17. Out of County / Out of Network (OOC/OON)

18. Provider Certification

CalMHSA Website: https://2023.calmhsa.org/

- Documentation Guides
- Login/Password/Security
- Downtime forms
- Information Sheets
- "How Tos"
  - Request for Services
  - Screening
  - Intake & Assessment
  - Services
  - Documentation
  - Discharge
  - CARE Act
  - Care Coordination
- Clinical Documentation
- Prescriber Documentation
- CSU Documentation
- Front Desk Documentation

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- Residential Documentation
- Privacy & Consents
- Error Reporting/Corrections
- Frequently Asked Questions

DHCS Website - Behavioral Health Medi-Cal County Customer Services

- SMH Services Billing Manual- FY 26-27
- Service Tables SFY (specific to FY) Specialty Mental Health Service Table- FY 26-27

Required Chart Documents

Programs are required to document the following within the SmartCare EHR and follow all current DHCS Documentation Requirements as outlined in BHIN 23-068:

1. Timeliness Report- TADT (OPOH Section F), CalMHSA- TADT
   - NOABD if timeliness not met (Optum Website> *NOABD* tab)
2. Consents
   - Authorization to Share Confidential Member Information (ASCMI)
     - OPOH Section E
     - CalMHSA ASCMI FAQs
     - CalMHSA- How to Complete the ASCMI
     - CalMHSA- How to Complete a CSI
   - Consent to Treat
   - Consent for Telehealth
     - CalMHSA- How to Complete a Telehealth Consent
     - OPOH Section C
   - Consent for email communication; consent for text communication
   - Additional consents or Release of Information as appliable
   - How to Document a Release of Information (CalMHSA)
3. Coordination with PCP and Behavioral Health Form- OPOH Section C
4. CSI Standalone Collection
   - CalMHSA- How to Complete a CSI
   - CSI Downtime Form
   - CalMHSA- CSI User Guide
5. Outcome Measures
   - Child Youth Family Programs - CANS & PSC-35
     - OPOH Section N
     - IP-CANS Manual/Reference Guide
     - SOC Outcomes for Children, Youth and TAY
     - UCRM- CalMHSA- CANS
     - UCRM- PSC Explanation Sheet
     - PSC Instructions for Use

- Adult Programs - LOCUS
  - San Diego Outcomes Measures Manual
  - UCRM- Adult Outcomes Explanation Sheet- LOCUS

6. Assessment(s) as applicable
   - Mental Health Assessment, Risk Assessment, Safety Plan
   - CalMHSA Documentation Guide
   - CALMHSA Documentation Guide- Appendix III (pg. 39)
   - BHIN 23-068
   - CalMHSA- Mental Health
   - CalMHSA- How to Complete the Safety Plan
   - SMHS-Clinical-Documentation-Guide-04.2026.pdf
   - UCRM: Safety Plan Explanation Sheet

7. Special Population or client flag, as applicable
   - Special Populations and How to Use Them - 2023 CalMHSA

8. Diagnosis Document
   - CalMHSA- How to Document a Diagnosis

9. Problem List
   - BHIN 23-068
   - CalMHSA Documentation Guide
   - How to Add a Problem to the Problem List
   - How to Remove a Problem
   - Problem List Overview
   - CalAIM-Behavioral-Health-Initiative-Frequently-Asked-Questions
   - OPOH: Section B, Section D

10. Service/Progress Notes -BHIN 23-068

11. Discharge
    - Discharge Summary (not required for all service lines but strongly recommended)
      - CalMHSA Documentation Guide
      - CalMHSA- How to Complete the Discharge Summary
    - CSI Standalone Collection- Discharge
    - Transition of Care Tool if referring or transferring client to MCP for ongoing services
      - OPOH: Section L
      - BHIN 25-020
      - UCRM- TOC Tool Explanation Sheet
      - CalMHSA- How to Complete a Telehealth Consent
      - DHCS- Screening and Transition of Care Tools