

General Updates

Error Correction Ticket Completion

When filling out tickets for error correction in SmartCare, please make sure ALL elements of the tickets are filled out (i.e. Client ID, Program, Service ID, Date of Service, etc).

Incomplete error requests will be sent back to the submitting program for completion.

Scheduling Client Appointments Now Limited to 180 Days Out in SmartCare

SmartCare will now only allow recurring scheduled appointments to extend out 180 days. If programs attempt to schedule a recurring appointment beyond 180 days, those appointments will not be scheduled in the system.

It is best practice to not schedule client appointments in SmartCare beyond the UM Cycle. This creates potential issues with services that may be left on the calendar and that may incur charges to BHS once we go live with the patient portal and appointment reminder messages. It also remains on provider dashboards and causes issues when terminating providers in the system.

Programs should review and revise their workflows if their workflows currently include scheduling appointments beyond 6 months into the future.

Non-Billable Services, Must Document Procedure Code(s)

Effective August 28, 2026, CalMHSA reverted the ISL Non-Billable Service, Must Document procedure code back to "Non-Billable Service, Must Document" and added a new "ISL Non-Billable Service, Must Document" procedure code, based on feedback from counties that there may be non-ISL activities or services that require documentation and should be distinguished from ISL activities or services.

At this time, providers are advised to only utilize the "Non-Billable Service, Must Document" until the BHP implements ISL tracking.

Further communications and guidance regarding ISL tracking will be forthcoming for "soft roll out" in Q3 and required DHCS implementation on January 1, 2027.

Upcoming Events

SmartCare User Group Meeting

- Date: Tuesday, September 22, 2026
- Time: 11:00am - 12:00pm

[Click to Join the Meeting](#)

SUD Quality Improvement Partners (QIP) Meeting

- Date: Thursday, September 24, 2026
- Time: 10:00am - 11:30am

[Click to Join the Meeting](#)

Skill Building Workshop (Outpatient Services)

- Date: Wednesday, October 7, 2026
- Time: 1:00pm – 2:30pm

[Click to Register](#)

Skill Building Workshop (Residential Services)

- Date: Wednesday, October 14, 2026
- Time: 1:00pm – 2:30pm

[Click to Register](#)

General Updates Continued...

Reminder: NOABD Monitoring and Submission

NOABD Logs for **Quarter 1** are due to QI Matters by **October 15, 2026**.

PLEASE NOTE: Only Excel logs will be accepted. Handwritten or faxed versions will not be accepted and will be returned.

While NOABD functionality is being developed in SmartCare, generating and tracking of NOABD's are on hold in SmartCare. In the interim, programs shall:

- Utilize the NOABD templates on the [SMH & DMC-ODS Health Plans](#) page on Optum under the "NOABD" tab.
- Utilize the [NOABD Tracking Log](#) to track NOABD information and submit this log to QA on a quarterly basis.

See the NOABD Process and blank Tracking NOABD log template posted on the Optum site under the "NOABD" tab.

IMPORTANT PRIVACY REMINDER: Due to PHI being included, please encrypt NOABD logs when sending.

- Please note that programs/legal entities on the County Transport Layer Security (TLS) secure email list have automatic encryption in place.
- If you are unsure if your program/legal entity is on the TLS list with automatic encryption, please encrypt as a precaution.

If your program has not sent in NOABD logs for any of the previous Quarters, please do so as soon as possible to ensure compliance.

Reminder: Medication Monitoring

Medication Monitoring for the period of **July - September (Q1)** will be due by **October 15, 2026**.

The required forms are posted on the Optum site under the "Monitoring" tab in the *DMC-ODS* section. Please ensure you are using the most up-to-date forms that are posted on Optum.

Ensure all the fields are completed on the submission form before submitting to QI Matters.

IMPORTANT PRIVACY REMINDER: Due to PHI being included, please encrypt Medication Monitoring when sending.

- Please note that programs/legal entities on the County Transport Layer Security (TLS) secure email list have automatic encryption in place.
- If you are unsure if your program/legal entity is on the TLS list with automatic encryption, please encrypt as a precaution.

For programs with nothing to report for the quarter, you must complete the required forms to submit indicating the status for the quarter. Emails without the forms will not be accepted.

General Updates Continued...

Medication Monitoring Submission Form Update

QA has created a streamlined Smartsheet form for the Medication Monitoring Submission Form.

- This will eliminate the need to send a separate submission form.

To access the form, please visit the following link: [BHS QA Medication Monitoring Smartsheet Form](#).

Please read all instructions before submitting.

- The link to the form will also be available on the Optum website, under the [SMH & DMC-ODS Health Plans](#) page, within the "Monitoring" tab.

Programs shall begin utilizing the new form for FY 26-27 Quarter 1 submissions due by **October 15, 2026**.

- Programs shall continue to submit the following forms via QI matters or secure fax: Medication Monitoring Tool(s)
- McFloop Form(s) (only if applicable)

For questions on the forms and the medication monitoring process, please email

QIMatters.HHSA@sdcounty.ca.gov.

Registered Psychologists

The State Plan (Supplement 3 to Attachment 3.1-A, Page 6a) inadvertently left out registered psychologists as an approved provider type within the DMC-ODS delivery system. Because of this omission, registered psychologists are currently not recognized as provider types in DMC-ODS. Information is available on page 51 of the [DMC-ODS-Billing-Manual-v-4.0](#).

Update: SUDPOH August 2026

- The SUDPOH has been updated for August 2026.
- This edition along with the Summary of Changes are now posted on the Optum site.
 - [SUDPOH - updated August 2026.pdf](#)
 - [SUDPOH Summary of Changes - updated August 2026.pdf](#)
- The next edition of the SUDPOH is planned for release in September 2026.

New Quality Assurance Specialist on the SUD QA Team!

Victoria Hernandez brings over 15 years of behavioral health experience across clinical care, program leadership, utilization management, quality improvement, and compliance.

Before joining the County, she served as a Senior Care Advocate with Optum, leading utilization management and quality assurance initiatives and acting as the subject matter expert for the BH-CONNECT rollout of inpatient authorization workflows, including those supporting the San Diego County Psychiatric Hospital. Earlier in her career, she directed multiple County-funded behavioral health programs, overseeing clinical operations, quality assurance, contract compliance, audits, and multidisciplinary teams.

Her longstanding collaboration with County partners has strengthened her commitment to teamwork and delivering high-quality services to the community.

Management Information Systems (MIS)

Batch Service Upload

The Batch Service Upload template has been updated to include **Mode of Delivery** as a required field. Beginning Monday, August 24th, providers submitting services through the Batch Service Upload must use the updated template for all uploads into SmartCare.

Templates that do not include the new Mode of Delivery field will no longer be accepted after this date. The new template is available on the CalMHSA website and should be used for all future Batch Service uploads.

Additionally, the **CoSD Batch Upload Reference Guide** has been updated to include Mode of Delivery. Please be sure to download and use the latest version of this report moving forward.

Reminder on Available SmartCare Training Opportunities

CSU and Residential/Crisis Residential Program Staff

- Step 1 - Complete the SmartCare Basics for All Users CalMHSA LMS module
- Step 2 - Submit EHR Access Request Form
- Step 3 - Choose from the three available Optum training options:
 - In-person
 - Live virtual
 - Video tutorials and knowledge check

Other Program Staff

- Step 1 - Complete the necessary CalMHSA LMS module(s) based on role
- Step 2 - Submit EHR Access Request Form
- Optional, but recommended:
 - In-person training or live virtual training

Benefit of CalMHSA LMS module only:

- Convenience- Available on demand and no travel necessary

Benefits of Optum in-person training:

- Opportunity to log in and navigate the SmartCare system
- Fewer distractions than learning in the workplace or at home
- Ease of support and feedback from trainer
- Aligns with San Diego workflows
- Includes requirements not covered in CalMHSA LMS module
- Excludes functions that do not pertain to individual staff roles (CalMHSA LMS modules cover certain functions that program staff do not have access to)

Benefits of Optum live virtual training:

- Opportunity to log in and navigate the SmartCare system
- No travel necessary
- Aligns with San Diego workflows
- Includes requirements not covered in CalMHSA LMS module
- Excludes functions that do not pertain to individual staff roles (CalMHSA LMS modules cover certain functions that program staff do not have access to)

Management Information Systems (MIS)

Refresher video tutorials now available on demand on the “Training” tab of the Optum website:

- Billing
- Medical
- Reports

If you have any questions, please contact Optum at SDU_sdtraining@optum.com or 1-800-834-3792, Option 3.

CalOMS Reminders

- Code **99904** “Client unable to answer” is **ONLY** allowed for detox clients or developmentally disabled clients.
 - Allowable entries:
 - 99900; Declined to State
 - 99901; Not sure/don’t know
 - 99902; None or not applicable
- The State **does not accept** any of the following special characters in responses:
 - Slash (/)
 - Parentheses ()
 - Hyphen (-)
 - Apostrophe (’)
 - Period (.)
 - Spaces ()
- Driver’s license or State ID fields are linked.
 - If a state is entered, a number must also be provided.
 - If client has neither, update with correct response under state, and enter 99902 for ID number.

Optum Website Updates

SmartCare Tab:

SMH & DMC-ODS Health Plan Page > SmartCare > Workflows and Documentation

- Clearing CoSD Service Error Report (My Office) – ***Updated***
- Accessing the COSD Authorizations Report in SmartCare – ACT/FACT Bundled Authorizations – ***Updated***

SMH & DMC-ODS Health Plans Page > SmartCare > Billing

- SmartCare Client Plan Request – ***Replaced***

SMH & DMC-ODS Health Plans Page > SmartCare > Town Hall & User Group PowerPoints

- COSD SmartCare User Group Slides 08.18.26 – ***New***

NOABD Tab:

SMH & DMC-ODS Health Plans Page > NOABD

- NOABD Tracking Log – ***Updated***

Optum Website Updates Continued...

The notices within the NOABD tab have been updated in the following languages:

- English
- Arabic
- Korean
- Persian (Farsi & Dari)
- Russian

SMH & DMC-ODS Health Plans Page > NOABD

- Non-Discrimination Notice – ***Updated***
- Delivery System Notice – ***Updated***
- Denial of Authorization Notice – ***Updated***
- Authorization Delay Notice – ***Updated***
- Financial Liability Notice – ***Updated***
- G&A Timely Resolution Notice – ***Updated***
- Modification Notice – ***Updated***
- Payment Denial Notice – ***Updated***
- Termination Notice – ***Updated***
- Timely Access Notice – ***Updated***
- Notice of Grievance Resolution – ***Updated***
- Notice of Appeal Resolution – Adverse Benefit Determination Overturned – ***Updated***
- Notice of Appeal Resolution – Adverse Benefit Determination Upheld – ***Updated***
- Notice of Appeal Resolution – Your Rights – ***Updated***
- NOABD Your Rights – ***Updated***

Incident Reporting Tab:

SMH & DMC-ODS Health Plans Page > Incident Reporting > Critical Incidents

- Critical Incident Reporting FAQ/Tip Sheet – ***Updated***
- Report of Findings (ROF) FAQ/Tip Sheet – ***Updated***

Training Tab:

SMH & DMC-ODS Health Plans Page > Training > DMC-ODS Only

- Annual CME-CEU Requirement Tip Sheet (Annual Addiction Medicine Tip Sheet) – ***Updated***

UCRM/SUDURM Tab:

SMH & DMC-ODS Health Plans Page > UCRM/SUDURM > MH & DMC-ODS > Risk Assessment

- Risk Assessment Explanation Sheet – ***Updated***

SMH & DMC-ODS Health Plans Page > UCRM/SUDURM > MH & DMC-ODS > Safety Plan

- Safety Plan Explanation Sheet – ***Updated***

OPOH/SUDPOH Tab:

SMH & DMC-ODS Health Plan Page > OPOH/SUDPOH > DMC-ODS (SUDPOH) > Full Handbook & Summary of Changes

- SUDPOH – Substance Use Disorder Providers Operation Handbook – ***Updated***

Optum Website Updates Continued...

- [SUDPOH Summary of Changes – August 2026](#) – ***New***

SMH & DMC-ODS Health Plan Page > OPOH/SUDPOH > DMC-ODS (SUDPOH) > By Section

- [SUDPOH Section C – Practice Guidelines](#) – ***Updated***
- [SUDPOH Section G – Quality Assurance](#) – ***Updated***
- [SUDPOH Section I – Staff Qualifications & Requirements](#) – ***Updated***
- [SUDPOH Section J – Facility Requirements, Licensing, Certification, etc.](#) – ***Updated***
- [SUDPOH Section O – Provider Contracting](#) – ***Updated***
- [SUDPOH Section P – Funding Source Requirements \(Contractor Instructions\)](#) – ***Updated***

SUD Resources Tab:

SMH & DMC-ODS Health Plan Page > SUD Resources > MD Info

- [Medical Director Training Requirements](#) – ***Updated***

Monitoring Tab:

SMH & DMC-ODS Health Plans Page > Monitoring > DMC-ODS

- [Medication Monitoring Submission Form](#) – ***Replaced with Smartsheet***
- [SUD Non-NTP QAPR Tool FY 26-27](#) – ***Updated***
- [SUD NTP QAPR Tool FY 26-27](#) – ***Updated***

Healthy San Diego Page

Healthy San Diego Page > Training / Education for Members

- [For Member | San Diego BHP-MOU Resource.Education-Chinese](#) – ***Updated***
- [For Member | San Diego BHP-MOU Resource.Education- Filipino-Tagalog](#) – ***Updated***
- [For Member | San Diego BHP-MOU Resource.Education-Korean](#) – ***Updated***

System of Care Application Updates

System of Care (SOC) Application

- Reminder for required monthly attestation in the SOC application and completion or update of Cultural Competency section.
 - See [SOC Tips and Resources](#) for more information.
 - Contact [Optum](#) for assistance in updating SOC fields.

Billing Reminders/Announcements

Medi-Cal Claim Denials

Following the announcement by the BHS Billing Unit during the August 2026 Office Hours presentation, the CalMHSA 814 Claims Denial Contractor Report is already accessible in SmartCare PROD. Programs should run the CalMHSA 814 and review denied claims on a regular basis. The report tip sheet is currently being worked on. When reviewing claim denials, please consult the "[CARC and RARC CalAIM](#)" table to understand the reasons for the claim adjustment and the remittance advice codes. For any questions related to SUD denied claims or denial reports, please contact SUDBillingUnit.BHS@sdcounty.ca.gov.

Data Science

No updates this month.

Population Health

Clinical SUD PIP: Improve Follow-Up After Emergency Department Visit for Substance Use (FUA)

- The PIP team is analyzing and preparing data collected to present at the next San Diego County IHI (Institute for Healthcare Improvement) collaborative meeting.

Non-Clinical SUD PIP: Increase the Percentage of Members With a Substance Use Disorder (SUD) Diagnosis Who Receive at Least One Peer Support Service

- Recruitment for educational brochure pilot programs is being gathered from Programs and Services for Outpatient and NTP programs.

QI Matters Frequently Asked Questions

No updates this month.

Recent Communications

No updates this month.

Resources

Behavioral Health Information Notices (BHINs)

- Behavioral Health Information Notices (BHINs) – DHCS notifies County BH Plans and providers of P&P changes via BHIN's as well as draft BHIN's for public input. Feedback can be sent directly to DHCS or BHS-HPA.HHSA@sdcounty.ca.gov.

Resources Continued...

Medi-Cal Transformation

- Medi-Cal Transformation (aka CalAIM) – info also available at the [Optum CalAIM Webpage](#) for BHS Providers for updates on Certified Peer Support Services implementation, CPT Coding, Payment Reform, Required Trainings, and relevant BHINs from DHCS. For general questions on local implementation of Medi-Cal Transformation, email: BHS-HPA.HHSA@sdcounty.ca.gov.

DHCS Licensing & Certification Guide:

- DHCS has released a Licensing and Certification Reference Guide for each MH and SUD facility type with mandatory and voluntary elements that are determined by County. You can access the resource linked here: [10.31 Licensing and Certification Infographic.pdf](#).

Email Contacts

- ARFs and Access questions? – Contact: BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
- EHR questions? – Contact: BHS_EHRSupport.HHSA@sdcounty.ca.gov
- Billing questions? – Contact: SUDBillingUnit.BHS@sdcounty.ca.gov
 - **NOTE:** Our organization has updated to a new mailbox system. Effective immediately, please send all ADP or SUD billing and billing-related emails to SUDBillingUnit.BHS@sdcounty.ca.gov. Our old email address, ADSBillingUnit.HHSA@sdcounty.ca.gov, is no longer functional as of 08/31/2026.
- CalAIM Q&As? – Contact: BHS-HPA.HHSA@sdcounty.ca.gov
- SUD Documentation Standards/SUDPOH/SUDURM questions? – Contact: QIMatters.HHSA@sdcounty.ca.gov

All BHS communications are distributed through GovDelivery.

Review the GovDelivery flyer for information on how to subscribe to receive our emails.

Is this information filtering down to your clinical and administrative staff?

Please share UTTM with your staff and keep them *Up to the Minute!*

Send all other questions to QIMatters.HHSA@sdcounty.ca.gov.