Up To The Minute!

COUNTY OF SAN DIEGO
BEHAVIORAL HEALTH SERVICES

MH PROVIDER EDITION | SEPTEMBER 2026

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

MH Quality Improvement Partners (QIP) Meeting

- Date: Wednesday, September 30, 2026
- Time: 1:00pm - 3:00pm

Click to Join the Meeting

Progress Notes Practicum

- Date: TBD
- Time: TBD

Coming Soon!

Audit Leads Practicum

- Date: TBD
- Time: TBD

Coming Soon!

General Updates Continued…

NOABD Monitoring and Submission

Reminder: 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 NOABD Tracking 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.

SMH Medi-Cal Provider Certification

An FAQ Tip Sheet was created to inform Legal Entities and Programs about MC Provider Certification requirements.

It is posted on the Optum site under the "Provider Certification" tab in the SMH section. It is revised monthly for potential revisions.

Reminder – DHCS requires counties to act as a liaison for Medi-Cal Provider Certification, including submitting all certification forms and evidence to DHCS for program setup and certification steps.

CoSD Little y Suspense Report

QA has put out guidance regarding billing when a client is in a Partial Lockout location or Full Lockout location. For Partial Lockout locations, Targeted Case Management (TCM/ICC) services bill as usual in this lockout setting and does not lockout in SmartCare. TCM/ICC is only allowable in this lockout setting when the service is related to discharge planning. If the client is in this lockout setting and the provided TCM/ICC services is not related to discharge planning, the note must be entered as a non-billable. SmartCare cannot distinguish if the service is discharge related. For Full Lockout locations, TCM/ICC services need to be entered as a non-billable service except for date of admission or date of discharge and the location should not be the lockout location.

General Updates Continued…

If a client is enrolled in a mental health skilled nursing facility (e.g. Lakeside), all services must be entered utilizing the non-billable code as SmartCare classifies SNF and Nursing Facility locations as medical nursing facilities and will not lock out the service when these locations are selected. The creation of this report will allow programs to be able to run and identify if they missed any services while client was enrolled in a lockout location. If programs identify that services were claimed inappropriately while client was in a lockout location, they should complete the appropriate PRF for the claim to be voided and follow the My Reported Errors correction process with entry of a non-billable service. There is no longer a Claim It Anyway process. Programs are responsible for running the report and ensuring they make the corrections as appropriate.

Clubhouse Services Available to Support Medi-Cal Members

Clubhouses have been a long-standing resource in the San Diego Community. As of this FY, there are eight Clubhouse sites active, with two more locations opening soon. These services are an available benefit for Medi-Cal and Medi-Cal-eligible adults who meet medical necessity criteria for Specialty Mental Health Services (SMHS). Clubhouses are community-based settings that support members with behavioral health needs while fostering connection, purpose, independence, and a sense of belonging. Unlike traditional clinic settings, Clubhouses are non-clinical environments. Rather than focusing on "treatment," Clubhouses engage members and staff in a structured work-ordered day, where they collaboratively operate and maintain the Clubhouse.

Some examples include:

- Administrative and organizational tasks
- Meal preparation
- Cleaning, organizing, and maintaining the Clubhouse
- Creating newsletters and social media updates
- Supporting Clubhouse communications and outreach
- Planning and organizing evening, weekend, and holiday programming

Clubhouses may also provide support in areas such as: Employment and Education Support, Linkages to Services, and Housing Support.

Clubhouse services can be provided simultaneously with other outpatient SMHS services.

A Clubhouse may be helpful for individuals who could benefit from:

- Increased social connection and a sense of community
- Opportunities to develop or strengthen daily living and vocational skills
- Employment or education support
- Assistance maintaining housing stability
- Increased community integration
- Meaningful structure and purposeful activity
- Additional support in maintaining progress toward their behavioral health goals

Providers are encouraged to reach out to their local Clubhouse to discuss individuals on their caseload who may benefit from Clubhouse participation.

For more information, please visit the BHS Support Services Website | Clubhouses.

General Updates Continued…

IHBS Prior Authorization Discontinued

On August 19, 2026 the Department of Health Care Services (DHCS) released BHIN 26-030 Authorization of Outpatient Specialty Mental Health Services (OSMHS). The guidance stipulates that:

Mental Health Plans (MHPs) shall not require prior authorization for the following services/service activities:

- Intensive Home-Based Services
- Crisis Intervention
- Crisis Stabilization
- Mental Health Services, including initial assessment
- Targeted Case Management
- Intensive Care Coordination
- Peer Support Services
- Medication Support Services
- Coordinated Specialty Care (CSC) for First Episode Psychosis (FEP)
- Individual Placement and Support (IPS) Supported Employment
- Clubhouse Services
- Parent-Child Interaction Therapy (PCIT)
- Multisystemic Therapy (MST)
- Functional Family Therapy (FFT)
- High Fidelity Wraparound (HFW)
- Enhanced Community Health Workers

Prior authorization or MHP referral is required for the following outpatient services:

- Day Treatment Intensive
- Day Rehabilitation
- Therapeutic Behavioral Services
- Therapeutic Foster Care
- Assertive Community Treatment (ACT)
- Forensic ACT (FACT)

Consistent with this guidance, the IHBS Prior Authorization requirement is discontinued effective immediately.

CSI Update

When completing the CSI Standalone form, and the Individualized Education Plan is selected from Special Populations, the district of residence will now be available as a drop down rather than a free text field. This will allow for standardized reporting to CSI. If a district is missing, please contact MIS at BHS_EHRSupport.HHSA@sdcounty.ca.gov to have it added.

General Updates Continued…

FSP Service Partnership Program Screening Requirements

The BHSA Policy Manual makes clear that Full Service Partnerships (FSPs) are responsible for conducting ASAM screening as part of an integrated assessment.

Referenced: BHSA County Policy Manual

Section B3 Full Service Partnership Program Requirements

- FSP services shall be provided in accordance with demonstrated clinical need and in alignment with the required high intensity service models: Assertive Community Treatment (ACT), Forensic ACT (FACT), FSP Intensive Case Management (ICM), and High Fidelity Wraparound (HFW).

Section: B5 Full Service Partnership Co-Occurring Capabilities

- Conducting ASAM screening as part of an integrated assessment upon intake into the FSP, and connecting individuals to SUD providers, as appropriate.

BQuIP

The BQuIP is an adult SUD screening tool developed in partnership between UCLA-ISAP and DHCS as a brief screening for initial placement into SUD services. It is structured to ask questions across each of ASAM's 6 dimensions, flagging urgent or high-priority items like withdrawal management, MAT needs, and co-occurring conditions. Its algorithm also iterates on certain questions depending on member responses, thus areas where additional questions are needed are asked because the tool directs the screener to ask them.

Youth under 18 will continue to use the current CRAFT for HFW programs.

What about 42 CFR Part 2:

The nature of the screening does not, by itself, create additional Part 2 considerations. Whether information is protected under Part 2 depends on whether the program qualifies as Part 2, not whether the information relates to SUD. If the FSP is not a Part 2 program, SUD screenings like the BQuIP would not subject members' information to Part 2 protections. If questions on Part 2 applicability for FSPs arise because of these BHSA requirements, we recommend legal entities discuss with their counsel to determine if their program qualifies as Part 2.

Next Steps:

- BQuIP Tool Provider training – a 5–10-minute training **(required)** – UCLA The Brief Questionnaire for Initial Placement
- Approved for use by clinical and non-clinical staff
- BQuIP User Manual
- BQuIP FAQs
- Review SmartCare BQuIP workflow guidance: How to Complete a BQuIP SUD Screening Tool - 2023 CalMHSA

General Updates Continued…

Individual Placement and Support (IPS) Supported Employment Services Available to Support Medi-Cal Clients

Through BH Connect, Medi-Cal and Medi-Cal-eligible adults who meet medical necessity criteria for Specialty Mental Health Services (SMHS) have access to the IPS EBP. The IPS model of Supported Employment is designed to support individuals living with behavioral health needs in obtaining and sustaining competitive employment in the community to support their recovery.

IPS has been shown to be effective among a wide range of individuals living with mental health conditions, Substance Use Disorders (SUDs), and co-occurring mental health conditions.

IPS services can be provided simultaneously with other levels of care and other service lines such as ACT, CSC, and outpatient programs. A team of employment specialists collaborates with each client to help them in their initial job search and with ongoing follow-along supports once they secure employment.

How Providers Can Connect Clients: IPS staff have begun attending staff meetings at some County clinics to help identify individuals who may benefit from IPS services. Providers are also encouraged to reach out to IPS contacts to make a referral.

Contact Information: https://www.neighborhoodhouse.org/nha-programs/career-core/

New Resource: Activity Funds

The Department of Health Care Services (DHCS) landing page on Activity Funds | DHCS offers an overview of a new resource for Medi-Cal members with child welfare involvement.

Children and youth who meet eligibility will have access to up to $1000 per year to participate in activities that promote physical and behavioral health outcomes, such as camps, soccer, dance, music lessons, activity equipment, and more.

Providers will access an online portal to enroll their clients who will work with Public Partnership LLC | PPL as the DHCS fiscal intermediary. PPL will be responsible for enrolling activity providers, managing the online portal fund disbursement system, and data reporting. Licensed Mental Health Professionals (LMHPs) who are qualified to direct Specialty Mental Health Services (SMHS) will play a critical role in making the connection to the appropriate activities.

Please view the one hour **California BH-CONNECT Activity Funds: LMHP Training | California BH-CONNECT Activity Funds: LMHP Training** to start learning about Activity Funds and the role of SMHS providers. Additional information will be forthcoming.

New Quality Assurance Specialist on the MH QA Team!

Shobhana Ghimire is an LCSW with several years of Utilization Management experience at Optum, where she completed utilization reviews for medical necessity, level of care, and regulatory compliance. Prior to that, she worked as a Psychiatric Social Worker at Sharp Mesa Vista, supporting patients and families with a wide range of mental health needs.

She is excited to bring her clinical and UM experience to the County, continue learning, and contribute to strengthening MH services in our 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)

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Management Information Systems (MIS) Continued…

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)

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.

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***

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***

Optum Website Updates Continued…

- 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***

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***

SMH & DMC-ODS Health Plans Page > UCRM/SUDURM > MH Only (UCRM) > Locus Adult Outcomes

- Adult Outcomes Explanation Sheet - LOCUS – ***Updated***

SMH & DMC-ODS Health Plans Page > UCRM/SUDURM > MH Only (UCRM) > LOCUS Quick Guide

- LOCUS Quick Guide – ***Updated***

OPOH/SUDPOH Tab:

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

- OPOH – Organizational Providers Operation Handbook – ***Updated***
- OPOH Summary of Changes – August 2026 – ***New***

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

- OPOH Table of Contents – ***Updated***
- OPOH Section B – Providing Specialty Mental Health Services – ***Updated***
- OPOH Section C – Practice Guidelines – ***Updated***
- OPOH Section G – Quality Assurance – ***Updated***
- OPOH Section I – Staff Qualifications – ***Updated***
- OPOH Section O – Contracting – ***Updated***

Optum Website Updates Continued…

MH Resources Tab:

SMH & DMC-ODS Health Plans Page > MH Resources > References

- San Diego County BHS Abbreviations List – ***Reposted***

SMH & DMC-ODS Health Plans Page > MH Resources > Therapeutic Foster Care (TFC) > TFC Prior Authorization Request

- TFC Prior Authorization Request – ***Updated***
- TFC Prior Authorization Request Explanation Sheet – ***Updated***

SMH & DMC-ODS Health Plans Page > MH Resources > Therapeutic Behavioral Services (TBS) > TBS Prior Authorization Request & Referral Form

- TBS Prior Authorization Request and Referral – ***Updated***
- TBS Prior Authorization Request and Referral Explanation Sheet– ***Updated***

SMH & DMC-ODS Health Plans Page > MH Resources >Mobile Crisis Response

- Mobile Crisis Billing Tip Sheet – ***Updated***

SMH & DMC-ODS Health Plans Page > MH Resources > Clubhouse Services

- Clubhouse Day Rate Service Entry in SmartCare without a Progress Note (Admin Service Entry) Workflow – ***New***
- Clubhouse Handbook – ***New***
- Clubhouse Service Note Template – ***New***
- Member Daily Reflection Template – ***New***
- SmartCare Workflow for Clubhouses – ***New***

Monitoring Tab:

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

- Medication Monitoring Submission Form – ***Replaced with Smartsheet***
- Medication Monitoring Process Flow Chart for Org Providers – ***Updated***
- FY 26-27 QAPR Program Compliance Attestation – ***New***
- FY 26-27 QAPR Tool – ***New for all LOCs/Service Lines***

Forms Tab:

SMH & DMC-ODS Health Plans Page > Forms > MH

- Request for Verification of Veterans Eligibility – ***Updated***

Provider Certification Tab:

SMH & DMC-ODS Health Plans Page > Provider Certification > SMH

- FAQ Tip Sheet for SMH Legal Entities – ***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

No updates this month.

Data Science

No updates this month.

Population Health

Clinical MH PIP: Improve Follow-Up After Emergency Department Visit for Mental Illness (FUM)

- 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 MH PIP: Improve Timely Access From First Contact From Any Referral Source to First Offered Appointment For Any Specialty Mental Health Service (SMHS)

- TADT (Timely Access Data Tool) data was analyzed from January through July 2026 to create the new Timely Access Dashboard.
- Refinement of TADT report for programs was done to include a list of TADT data entry errors.

QI Matters Frequently Asked Questions

Q: Now that we account for Travel Time in progress notes, can we claim for services during car rides?

A: Programs are reminded that if claiming for billable services during car rides/whilst transporting the member, documentation must include Specialty Mental Health services. For example, a TCM service/check-in during transportation must include the clinically appropriate intervention, member response, and any relevant next steps.

Time spent on non-billable activities (not SMHS) must be excluded from the time claimed for TCM. Providers are expected to follow safety precautions when operating a vehicle and providing SMHS.

QI Matters Frequently Asked Questions Continued...

Q: Can providers include the Mental Status Exam within in the Mental Health Assessment (MHA)?

A: Programs are encouraged to complete the stand-alone MSE in SmartCare to ensure that all applicable elements are covered. If not using this form, the qualified provider must capture all relevant MSE information and document this in **Domain 1** of the MHA. Missing appropriate MSE documentation will result in a mark out of compliance.

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.

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: MHBillingUnit.BHS@sdcounty.ca.gov
    - NOTE: Our organization has updated to a new mailbox system. Effective immediately, please send all MH billing-related emails to MHBillingUnit.BHS@sdcounty.ca.gov. Our old email address, MHBillingUnit.HHSA@sdcounty.ca.gov, is no longer functional as of 08/31/2026.

Resources Continued…

- CalAIM Q&As? - Contact: BHS-HPA.HHSA@sdcounty.ca.gov
- SMHS Documentation Standards/OPOH/UCRM 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.