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CalMHSA
California Mental Health Services Authority

CalMHSA.org

Change Management Workflows

WHAT TO EXPECT

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CalMHSA

Contents

- Change Requests

- State Initiatives

- Design Process

- Protocols

- County Feedback

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Change Requests

Where they come from

- State Initiatives

- CalMHSA Vision
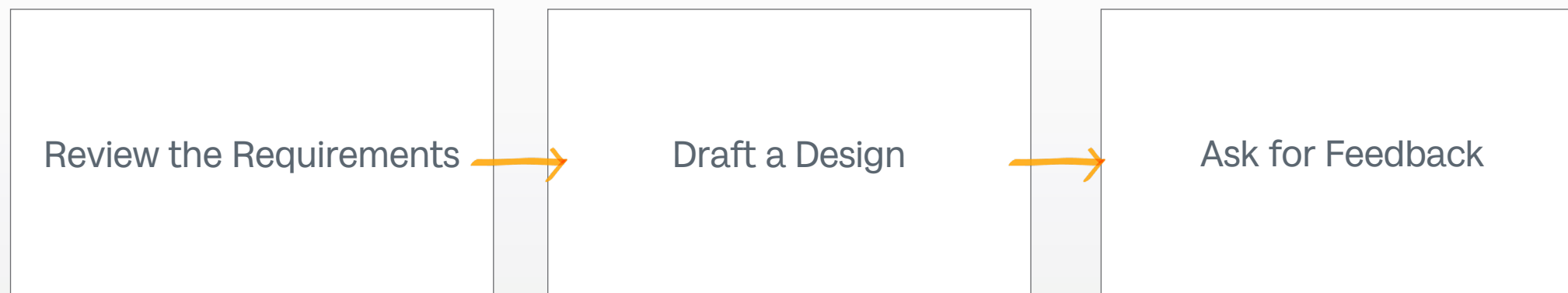
- Troubleshooting Bugs

- County Requests

We went live with SmartCare knowing that enhancements would be needed to get the product we envision. We continue to work toward that vision together as a collective of 23 counties. Change takes time and we appreciate your patience as we tackle each one in turn.

State Initiatives

Tracking and Prioritization

- CalMHSA Managed Care Team is working with the CalMHSA EHR Team to ensure BHINs are tracked and flagged for EHR changes

- CalMHSA is looking at draft BHINs, but may wait until final guidance is given before engaging development resources, as re-designs sometimes mean starting over

- State Initiatives take priority over "nice to have" items meant to streamline the end user's experience

Design Process

Review the Requirements	Draft a Design	Ask for Feedback

ALL CHANGES GO THROUGH THE SAME DESIGN PROCESS

Some take longer than others!

Design Process

Things to Consider

- New Documents or Screens to create? What about List Pages? Widgets?

- New Procedure Codes? What about rates?

- New Reports? What are the required data elements? Is there a specific Data Dictionary we have to use? Are there timelines?

- Who gets permissions to these items? Are there privacy implications?

- What does the real-life workflow look like? What are all the iterations that could possibly occur?

Protocols

Workflows and Guidance

- Continue to post protocols on 2023.calmhsa.org

- Will post draft protocols once a design is drafted

- Alert counties to updates and new posts

The Protocols section is password-protected, as this is guidance provided directly to EHR-counties. These protocols are vetted with the CalMHSA Managed Care Team and CalMHSA Leadership. These protocols are often points of discussion between CalMHSA and DHCS, to get State buy-in.

County Feedback

Real-World Application

- CalMHSA will schedule targeted County Feedback Sessions on specific topics
    - Allows for your county experts to be involved in the discussion
    - May require more than one session
- Designs will be shared with counties for detailed feedback, as applicable

While some changes may be straight-forward, not requiring any discussion, most will be complicated, requiring input from real-world experts. This is not a one-time process, but a recurring process that evolves as people use the system and learn the workflows. CalMHSA relies on counties to provide actual scenarios that occur to refine our shared system.

Where we're at

Change doesn't happen in a vacuum. Change is a process. We have a lot of changes we're planning on making, as well as many that you've requested that we're exploring. But sometimes plans get overcome by events. That doesn't stop us from moving forward, but it may change the path we choose to take.

✓ **Keep moving forward!**

✓ **Eyes on the prize!**

✓ **Work together!**

Questions?

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Thank You

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