

Initiatives Report

Name	Public Description	Section/Column	Priority 1-10
Prevent service edit when staff association does not exist to program	Currently, if a user can see a service via the Service Detail screen, and they are able to edit the Service Detail screen, they are able to make edits to it regardless of whether this service is associated to one of their programs or not. We are requesting that if the service being created/edited is associated with a program that the user is not associated with, the user should not be able to save any changes. This would mean that Sys Admin and County-Level Billers would need to have ALL program associated with their accounts.	Billing, Compliance	1
CARE Act Hearing Notes - Add "N/A - No next court hearing"	This is a design change based on feedback from the county that originally designed these notes. They're finding that sometimes the court is dismissing the case in the middle of the CARE Process. If this occurs, there won't be a next court date. We will look into ways to address this instance (e.g. a new question, an option for "N/A"), but in the meantime, we are looking to briefly disable these validations.	Clinical Documentation/Workflows	1
Stanislaus: Diagnosis does not match Problem List	I'm able to see the problem list appropriately and able to select what problems I worked on during this session. But once I sign the document, the problems without a SNOMED don't seem to be showing up on the PDF. UPDATE: Fix confirmed in Prod 6/18/25	Clinical Documentation/Workflows	1
CalMHSA CARE Act Inquiry Report	This is a report for counties to gather information on CARE Act Inquiries, as gathered via the Inquiry Details screen. The information from this report will need to be entered/pasted into the CARE Act reporting workbook for section 4 on Inquiries.	Data Dictionary Version 2	1
Diagnosis search does not match Problem List search & blank description when no SNOMED code	The Problem List currently searches by SNOMED codes by default. Since California BH uses ICD-10 codes, we're asking Streamline to include the ICD-10 description as the primary description in the Problem List and to default the code search by ICD rather than SNOMED. This should also address the issues where the ICD-10 code does not have a corresponding SNOMED code. The SNOMED description will still be visible if desired, but the ICD-10 description will take center-stage. This was part of December 2024 development.	Clinical Documentation/Workflows	2
Service Request - List pages don't seem to be working accurately (workgroup issue)	Known Issue: List pages don't seem to be showing the correct results. List pages don't match widget. Some of this is related to workgroups, as it doesn't seem to be filtering by assigned staff or workgroup correctly. Streamline is working on a fix. UPDATE 5/21/25: This is in design	Compliance	2
Service Request - List pages don't seem to be working accurately (workgroup issue)	Known Issue: List pages don't seem to be showing the correct results. List pages don't match widget. Some of this is related to workgroups, as it doesn't seem to be filtering by assigned staff or workgroup correctly. Streamline is working on a fix. UPDATE 5/21/25: This is in design	Urgent Issues	2
Merge clients - inquiries are not included in the merge	Streamline has confirmed that when using the merge client feature, inquiries are not currently included. CalMHSA feels this is a design flaw and is requesting that when 2 clients are merged, any inquiries that are associated with the client being removed be re-associated with the client being kept. No other changes to the inquiry or Client Information should be made (keep historical inquiry information, don't re-push info from the inquiry into the Client Information screen).	Clinical Documentation/Workflows	3
Client Information: ROI Log includes revoked ROI with end date of today; risk for potential breach	CalMHSA has reported this as a bug. When a client revokes an ROI, the ROI is updated to have an end date of the revocation date, which defaults to today unless the user changes it. On the Client Information screen on the Release of Information Log tab, any ROIs with an end date of today are still included in the "currently effective" filter. This means that if a client revoked the release of information today, it will still show as effective on the ROI Log. This represents a risk for potential breach of information, and we are stating that our expectation would be that when a client revokes the ROI, it is considered not effective and therefore would be removed from the effective ROI list. UPDATE: is scheduled for May 2025 MSP	Compliance	3
General - Add ability to track all changes made in the system	We would like to be able to track all changes that occur in the system, including what user made the change and when. Right now, this amount of audit tracking would greatly impact performance. However, we still see this as a need. We are currently in compliance with all tracking regulations regarding client chart access, but feel the ability to track changes is key to quality assurance.	Compliance, SysAdmin/System Level	3
SI 2. BHIN 24-039 AB-2242 MCCP Care Coordination Plan	This is the initiative to address: BHIN-AB-2242-MCCP-Care Coordination Plan for patients with involuntary holds. We are reviewing this information and awaiting more information from state We will notify counties once there is a plan	Other Documents, Reports, State Requirements	3
SI 2. BHIN 24-039 AB-2242 MCCP Care Coordination Plan	This is the initiative to address: BHIN-AB-2242-MCCP-Care Coordination Plan for patients with involuntary holds. We are reviewing this information and awaiting more information from state We will notify counties once there is a plan	Other Documents, Reports, State Requirements	3
Service Request List Pages - Need a way to Allow Sys Admins to See Records NOT Created By/Assigned to Themselves	In order to best protect screen records that can't be assigned to a specific program like documents are, we designed the list pages to only show records created by or assigned to the logged in user or their supervisees. However, there is a need for administrative staff to be able to see any and all records that were created. Example: a system administrator needs to be able to view a request that a user put in and is assigned to a billing staff who is on vacation. They need to be able to see this record to troubleshoot it. In the meantime, we recommend that any staff who needs to oversee or troubleshoot these issues be added as a supervisor to the people they're overseeing.	Urgent Issues	3
C-SSRS - Need "Unknown/Didn't Answer" option	We have heard that many counties use the C-SSRS documents but are having an issue when a client refuses to complete the assessment. One county reached out to Columbia to confirm the appropriate practice when a client was unable or unwilling to continue when mid-way through a screening. In response to Columbia's feedback, we are requesting that a checkbox be added on each C-SSRS document that indicates that the client was unable/unwilling to complete the screen and that this checkbox may be selected at any given time during the assessment. Checking this box will remove the validations requiring the rest of the document to be completed and will add a notation on the PDF indicating why some questions are not answered. We are also requesting that when this change is made it be applied to any in-progress C-SSRS documents so that users will not have to delete the in-progress document and start over. While the C-SSRS forms are not required by DHCS, we understand that many of our counties use them, and therefore are taking steps to ensure they can use them fully.	Clinical Documentation/Workflows	5
[Inpatient] - Enhancement: Add Administrative/Acute Column to Bedboard [EXTERNAL]	[Inpatient] - Enhancement: Add Administrative/Acute Column to Bedboard [EXTERNAL]	Inpatient/Residential/CSU	5
Add language and interpreter fields to Inquiry Details screen	Add Language and Translator information to Inquiry. Language and translation service tracking is required for the NACT.	State Reporting	5
Add/delete items at scale (example: figure out a way to quickly add more than 1 staff/user to a new program)	Right now when creating a new program, you can't add staff to the program in the program set-up. You have to go to each staff/user profile and add the new program manually. This is very tedious and time consuming. There are numerous other examples of not being able to work at scale. This includes being able to add multiple programs to a user's account at once but having to remove programs one at a time. We're trying to make these types of processes more user-friendly and efficient. This is on Streamline's roadmap for 2026.	SysAdmin/System Level	8
Add a School Name field to the Custom Fields tab of Client Information	Received a request to add a school name field in Client Information. This would use a global code category that counties would populate with local schools. This is likely a low-hanging fruit type request.	Patient Administration	10
Overarching ZD ticket for CARE Version 3 (Data Dictionary V2.0)	CalMHSA will work to make adjustments to CARE Act reporting once the DHCS Data Dictionary version 2.0 has been finalized, which is expected to be in Feb 2025.	Data Dictionary Version 2	TBD
CARE Act: Need ability to map global codes from Client Info to CARE Act multi-to-one	CARE Act: Need ability to map global codes from Client Info to CARE Act multi-to-one	Design Changes v1.5 (SL Version 2 Rollout)	TBD
CARE Act CPT Crosswalk: HK Modifier isn't present in the CARE Act Services to CPT Codes Details screen	CARE Act CPT Crosswalk: HK Modifier isn't present in the CARE Act Services to CPT Codes Details screen	Design Changes v1.5 (SL Version 2 Rollout)	TBD
CalMHSA/Fresno: Workflow for Medical Residents/NPs/PAs writing notes and getting Attending's approval/attestation [EXTERNAL]	CalMHSA/Fresno: Workflow for Medical Residents/NPs/PAs writing notes and getting Attending's approval/attestation [EXTERNAL]	Medical	TBD
CARE Act: Additional development not related to state requirements	CARE Act: Additional development not related to state requirements	Original Design/Request Tickets	TBD
ALL COUNTIES - Coordinated Care Consent (and ROI) in Spanish (and other languages)	With all legal forms, we need to provide the document in the client's language. If someone only speaks Spanish, they can't be expected to understand a document in English and agree to something. We've had the form translated and are using a paper version to provide the client with the information in their language. We then scan that in and associate it with the SmartCare version. That is a workaround, and we are hoping to get these forms in multiple languages in SmartCare.	TBD	TBD

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Add configuration key "DisplayOrRemoveRevokedROInReleaseOfInformationLog"	Add configuration key "DisplayOrRemoveRevokedROInReleaseOfInformationLog"	TBD	TBD
Ventura, Enhancement Request - Screen to track AOT Client Referrals	Ventura, Enhancement Request - Screen to track AOT Client Referrals	TBD	TBD
Test flow with Referral screen once Care Coordination goes live	Test flow with Referral screen once Care Coordination goes live	TBD	TBD
Hold County shared-decision-making meeting to determine what is missing	Hold County shared-decision-making meeting to determine what is missing	TBD	TBD
Diagnosis search does not match Problem List search & blank description when no SNOMED code QA Testing	Diagnosis search does not match Problem List search & blank description when no SNOMED code QA Testing	TBD	TBD
Diagnosis search does not match Problem List search & blank description when no SNOMED code Prod Testing	Diagnosis search does not match Problem List search & blank description when no SNOMED code Prod Testing	TBD	TBD
County Shared Decision Making Meeting - Reviewer Process	County Shared Decision Making Meeting - Reviewer Process	TBD	TBD
Send recording from meeting + deck	Send recording from meeting + deck	TBD	TBD
Current Reviewer Process, Update with Workflow on the website	Current Reviewer Process, Update with Workflow on the website	TBD	TBD
Global Codes for role , select procedure codes education	Global Codes for role , select procedure codes education	TBD	TBD
Article for Sys Admin: How to turn Reviewer Process for Document or Service Note	Article for Sys Admin: How to turn Reviewer Process for Document or Service Note	TBD	TBD
Article on End User/Trainee: Document/Note Requires Reviewer	Article on End User/Trainee: Document/Note Requires Reviewer	TBD	TBD
Article on End User/Supervisor: Supervisor/Attending Reviewer Process	Article on End User/Supervisor: Supervisor/Attending Reviewer Process	TBD	TBD
Request that checkbox be removed for sync to Dev Team Re:Reviewer Process	Request that checkbox be removed for sync to Dev Team Re:Reviewer Process	TBD	TBD
Use Case (from Tulare): Client requests amendment to a service note but the original clinician no longer works here.	Use Case (from Tulare): Client requests amendment to a service note but the original clinician no longer works here.	TBD	TBD
Kern, Enhancement Request: Psych Note Attestation for Attendings to this ticket	Kern, Enhancement Request: Psych Note Attestation for Attendings to this ticket	TBD	TBD
Schedule County Decision Making Meeting	Schedule County Decision Making Meeting	TBD	TBD
Write up the list of scenarios to send to counties for review prior to this meeting	Write up the list of scenarios to send to counties for review prior to this meeting	TBD	TBD
Procedure codes set up - pending with Roskana/Lisa	Procedure codes set up - pending with Roskana/Lisa	TBD	TBD
Rates set up with Khristy/Andrew	Rates set up with Khristy/Andrew	TBD	TBD
Fix the short term work around for trainees/supervisor whenever Khristy finishes set up for billing	Fix the short term work around for trainees/supervisor whenever Khristy finishes set up for billing	TBD	TBD