CalMHSA
California Mental Health Services Authority

October-November 2025 MSP Highlights

October #2
For the service request process, the list page filters should be fixed. Now, counties can select a single staff member or all staff members, as well as one, many, or all workgroups. These two filters can be used separately or together. If users select a single staff member and zero workgroups, they will only see records associated with that staff member. Selecting all staff and all workgroups will yield all records for the user and all their supervisees, as well as all records associated with a workgroup they or their supervisees are associated with.

October #12
"Tribal affiliation" is now added to the Client Information screen. This field will appear when either "Alaskan Native" or "American Indian" is selected in the "Race" field. This is a searchable field and seems to have all tribes on the USCDI list available.

October #30
There is a new filter on the Documents (Client) list page for "Document Category." CalMHSA has reviewed this new item and does not currently see a use case for it. While categories of documents (e.g., "Legal Documents") would be helpful, that functionality already exists in the existing Document Type filter. CalMHSA created folders and subfolders in the Document Type filter, allowing users to select a specific document (e.g., "Consent to Treat") or a subfolder (e.g., "Legal Documents"), which will show all documents within that subfolder (e.g., "Consent to Treat", "ROI", "Consent to Treat (scanned)"). CalMHSA has also put certain documents in multiple subfolders (e.g., Crisis Assessment is under both "Assessments" and "Crisis"). If counties have a use case that is not currently being met, CalMHSA is willing to explore and discuss potential options. If counties see a county-specific use case, they are free to use it.

October #32
The Programs filter in the Documents (Client) list page previously showed only active program enrollments or programs that the client had recently discharged from. This has been fixed to show all program enrollments that the client has ever had, allowing users to filter by historical episodes.

November #16
In the Inquiry Details screen, the crisis tab would allow any crisis procedure to be used with any program. This has been fixed. CalMHSA will set the appropriate configurations in CalMHSA Prod, which will then push those updated configurations to counties.

November #46
For the service request process, some counties wanted to grant permission to the

Approval tab so that the requester can see what was approved. However, counties did not want the requester to be able to approve their own request. CalMHSA explored creating a permission to the "Modify" button on the Approval tab. We found that there was an issue that did not allow this permission to work correctly. This item in the November MSP fixes that issue.