

# AGENDA

## Tools for Transformation

### EHR County Conference

 May  
19 & 20

 DoubleTree  
Sacramento  
CAPITOL BALLROOM

DAY 1 — TUESDAY, MAY 19

12:00 p.m. — Registration

1-5 p.m. — Sessions:

**Datapalooza: Making BHSA Work for You & Cracking the Code on ISL Reporting**

A practical deep dive into ISL Datapalooza and how counties can leverage it to meet BHSA reporting requirements and drive operational improvements. Includes a demonstration of how the updated Datapalooza (program data meta tagging) approach helps organize programs within the EHR, making future reporting clearer, more adaptable, and easier to manage as requirements evolve.

**Care Coordination Think Tank: Designing the Future**

An interactive discussion on the future of care coordination, emphasizing workflow design, staffing strategies, ADT signals, and tools to help counties meet performance measures.

**Interoperability in Action: What's Next for Improving Care**

Review the interoperability journey—from foundational milestones to future-ready solutions—and learn actionable steps counties can take to share and leverage health and social services data.

**Patient Portals: Exploring What We Really Want**

An eyes-wide-open look at patient portal options in IntelliChart. Discussions will focus on workflow improvements, benefits, limitations, and implementation considerations.

**Multi-Factor Authentication (MFA): Why You Should Turn It On Now**

Security overview and practical guidance on enabling MFA within SmartCare environments.

5:15 p.m. — Hosted Reception

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DAY 2 — WEDNESDAY, MAY 20

7:30 a.m. — Coffee, Tea & Light Refreshments

8 a.m. – 12 p.m. — Sessions:

### **ASCOMI: What/Why/When and Early Adopter Reflections**

A county member of the early adopter cohort shares their early adopter experience including communication strategies, implementation insights, and lessons learned.

### **Documenting Homelessness: Meeting BHSA Reporting Requirements**

A practical look at meeting BHSA regulatory requirements for documenting and codifying county investments in homelessness initiatives.

### **Fiscal Tools to Facilitate BHSA Implementation**

A demonstration of SmartCare fiscal tools that help counties operationalize and track BHSA initiatives and funding.

### **Enhancing Clinical Performance and Insights Through Dashboards**

CalMHSA and Behavioral Health Plan staff will demonstrate how enhanced analytics Compass dashboards can help BHPs navigate their data and identify meaningful trends to support better decisions.

### **Multi-Topic Lightning Sessions**

- **Policy Playbooks: Policy and Implementation Support**  
An overview of CalMHSA policy playbooks and how they translate regulatory requirements into practical EHR workflows.
- **How We Share Knowledge – Improved Training and Information Delivery**  
Preview of improvements to CalMHSA's knowledge-sharing ecosystem, including a redesigned information experience for counties.
- **Helpdesk Optimization: Helping Us Help Counties**  
Explore ways counties can optimize the helpdesk and live chat experience, including configuration options and workflow improvements.

### **Measuring Clinical and Cost-Effectiveness of AI Tools – Panel and Collaborative Discussion**

A strategic session examining how counties should evaluate AI-assisted documentation tools, with a focus on defining value, setting metrics, and determining success criteria.

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**12:00 p.m. Lunch**

**12:45 p.m. An Interactive Demonstration of AI-Assisted Note Taking**

A hands-on exploration of AI-assisted note taking, including documentation automation and compliance guardrails that help clinicians ensure complete and compliant encounters.