



<b>To:</b>	<b>BHS County Operated and Contracted Service Providers</b>
<b>From:</b>	<b>Behavioral Health Services – SmartCare EHR Project Team</b>
<b>Date:</b>	<b>February 23, 2026</b>
<b>Title</b>	<b>New SmartCare User Role for Adding Home Medications Prescribed Elsewhere</b>

**SD Home Medications Role/Permission**

A new role in SmartCare has been designed to allow for the addition of home medications to a client’s chart by non-prescribers through SmartCare RX called **SD Home Medications**. This role will allow for the addition and discontinuation of home medications (medications prescribed elsewhere) in SmartCare by Licensed Practitioner of the Healing Arts (LPHA) providers and Licensed Vocational Nurses (LVNs) effective **March 2, 2026**.

**Will I need to request this permission/role for my staff?**

This new role is limited to LPHA (licensed/waivered/registered clinical staff) and LVNs so that they may add home medications/medications prescribed elsewhere in SmartCare to improve communication and visibility of client medications between providers and prescribers. Programs will not need to submit an Access Request Form (ARF) to request the addition of this role; it will be included as part of the LPHA or LVN permissions.

**Medication Entry Pathways in SmartCare**

**CalMHSA RX** is a SmartCare application that allows prescribers and medical staff to manage a client’s prescriptions. CalMHSA RX access is limited only to prescribers and the following LPHA-level staff: NPs, PAs, and RNs. Medications entered into CalMHSA RX will appear on the CalMHSA Client Medication Reconciliation page and in the Psych/Med Note but will **not** flow into SmartCare RX.

**SmartCare RX** is a tool available in SmartCare which allows *non-prescribers* to document a client’s home medications/medications prescribed elsewhere accurately and consistently. Providers who are given this new permission will enter client’s home medications via SmartCare Rx, they will not have access to CalMHSA RX.

Medications entered into SmartCare RX will appear on the CalMHSA Client Medication Reconciliation page, Medications Widget and in the Psych/Med Note but will **not** flow into CalMHSA RX.

**Allergy Entry via SmartCare RX**

Providers with SD Home Medications permission will also be able to enter client reported allergies into SmartCare RX when entering home medications. Allergies entered via SmartCare RX will also appear on all Allergy Screens and Widgets in SmartCare.

**Important Note: Prescribers will need to regularly reconcile these lists to reduce confusion for other users.**

Home medications added in SmartCare RX will **not** show in CalMHSA Rx. If home medications are added in both CalMHSA RX (*recommended that all medications/prescriptions are added through this platform by the prescriber*) and SmartCare RX (*only for limited use by non-prescribers assigned this new role*), they will appear as duplicates in the psych medical note, widgets, screens and various reports.

**For More Information:**

- [QIMatters.HHSA@sdcounty.ca.gov](mailto:QIMatters.HHSA@sdcounty.ca.gov)
- [BHS\\_EHRAccessRequest.HHSA@sdcounty.ca.gov](mailto:BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov)



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Prescribers should follow the Prescriber Workflow to reconcile medications between CalMHSA RX and SmartCare RX to ensure all medications reported by client are entered into CalMHSA RX and then discontinued in SmartCare RX.

A separate communication will be sent out to all prescribers who are registered via e-prescribe in SmartCare.

**Training**

The SmartCare Home Medication Entry/Reconciliation Workflow Guide has been developed and will be available on the Optum Website by 2/27/2026 →SMH & DMC-ODS Health Plans Page → SmartCare Tab → [WorkFlows & Documentation dropdown](#).

The SmartCare trainings, provided by Optum, have been updated to include the Home Medications workflow for applicable live trainings and webinars.

**Additional Resources**

**Home Medication Guide for Prescribers**

1. Navigate to CalMHSA Client Medication Reconciliation List Page: [How to Complete a Medication Reconciliation](#)
2. Navigating to SmartCare RX Medication Entry Screen and Looking up Client: [First Way: Rx Screen to Patient Search](#)
3. Deleting Home Medications in SmartCare RX: [How to Discontinue a Medication](#)

**Home Medication Guide for Non-Prescribers**

1. Navigate to CalMHSA Client Medication Reconciliation List Page: [How to Complete a Medication Reconciliation](#)
2. Navigating to SmartCare RX Medication Entry Screen and Looking up Client: [First Way: Rx Screen to Patient Search](#)
3. Entering Home Medications in SmartCare RX: [How to Add Medications Prescribed Elsewhere](#)
4. Entering Client Reported Allergies in SmartCare:
  - a. [How to Add an Allergy, Intolerance, or Failed Trial](#)
  - b. [How to Update an Allergy, Intolerance, or Failed Trial](#)
  - c. [How to Delete an Allergy, Intolerance, or Failed Trial](#)

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