



To:	BHS County-Operated and BHS Contracted Service Providers – SMH& DMC-ODS
From:	Behavioral Health Services
Date:	November 25, 2025
Title	SmartCare Batch Upload Process

The SmartCare Project Team has completed testing of the Batch Upload Process in SmartCare and it will be available for use by providers effective **December 1, 2025**. Batch Upload access will be provided *by request* to SUD Providers and those providers who currently utilize an alternate Electronic Health Record (EHR) for service documentation and administratively enter their service claims into SmartCare for claiming/billing purposes.

The Batch Upload process is an optional process; Programs who determine that they cannot internally support the batch upload process should continue to follow the current workflow for service entry.

What is Batch Uploading?

The Batch Upload feature allows a program to bulk upload services via a templated Excel spreadsheet into SmartCare for processing claims/billing.

Programs interested in utilizing the Batch Upload process should first review the guides available on CalMHSA's website before requesting access. The following guides are recommended:

[Service Import Into Practice Management - 2023 CalMHSA](#) – explanation of the Batch Service Upload Template requirements and formatting, how to complete a batch service upload, review a uploaded batch service file, correct batch upload errors and view services created from the nightly service job.

[Batch-Service-Global-Code-Reference-Guide.xlsx](#) – this is the Batch Service Upload Template, which includes global code ID's which programs will need to download from SmartCare for their program in order to create their Upload Template.

[How to Complete an Upload Template - 2023 CalMHSA](#) – guidance on completing an upload template; this resource provides a detailed, step-by-step explanation of how to properly prepare your file.

MIS will provide specific instructions and workflow to programs when Batch Upload access is requested and approved.

Program Responsibility

Programs will be responsible for any internal IT processes to format and map the data export from their EHR to the SmartCare Batch Upload Template and for updating and maintaining accuracy of data fields (ie.: staff changes).

For More Information:

- CalMHSA HelpDesk (General Support): <https://2023.calmhsa.org/>
- MIS Access: BHS_EHRAccessRequest.HHSA@sdcounty.ca.gov
- MIS Support: BHS_EHRSupport.HHSA@sdcounty.ca.gov

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Programs will need to work with their internal IT department to address any data export and code mapping workflow needs; MIS will not be responsible for set up of program Batch Service Upload Template mapping or data merging of program export data and SmartCare data.

How to Request Access to Batch Upload:

Providers interested in utilizing the Batch Upload Process may submit their request via email to MIS at BHS_EHRAccess.HHSA@sdcounty.ca.gov and provide the following information in their email:

- Subject line: Batch Upload Access Request
- Identify current EHR system utilized by your program
- Submit a Modified ARF Request(s) for staff that will be responsible for completing the batch upload in SmartCare; **specify the required role in the comment section: “SD Batch Upload Add On.”**
 - Recommendation that programs designate 1-2 key staff who are responsible for administrative entry and billing within SmartCare and have current access/completed all required SmartCare trainings
- Identify/Confirm available IT staff who will be responsible for mapping data from your program’s EHR export to the SmartCare Batch Upload Template
 - Programs are responsible for internal IT processes to map data export from their EHR to the Batch Upload Template and for updating and maintaining accuracy of data fields (ie.: staff changes)

MIS will review program requests and reach out to programs for additional information as needed. Once requests have been reviewed and ARFs received, MIS will provide grant access to the necessary reports and batch upload screens and provide the program with Instructions and workflow required to be able to prepare their Batch Upload file and Batch Service Upload Spreadsheet for upload into SmartCare.

Who Should Programs Reach Out to for Support for Batch Upload Questions?

Programs should reach out to the CalMHSA Helpdesk and/or utilize their internal IT department for assistance to troubleshoot issues or questions related to the Batch Upload Process.

As a reminder, instructions on how to reach out to the CalMHSA Helpdesk can be found on the Optum Website: [SmartCare Help Desk Flyer as of 3/1/25](#).

Please follow current processes to report issue escalation to the EHR Support Team.

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