

# INNOVATION PROJECT STAFF ANALYSIS: Semi-Statewide Enterprise Health Record Project (Phase 2)

## Lake County

**Total INN Funding Requested:** \$82,471.30

**Duration of INN Project:** 2 years

## Review History

**Public Comment Period:** February 17, 2026 – March 19, 2026

**Behavioral Health Board Hearing:** March 26, 2026

**Board of Supervisors Approval:** July 8, 2025

## Project Introduction

Lake County Behavioral Health Services (LCBHS/County) is requesting up to \$82,471.30 of Innovation spending authority over a period of two (2) years to partner with the California Mental Health Services Authority (CalMHSA) on Phase 2 of the Semi-Statewide Enterprise Health Record Innovation Project (EHR Project). There are currently over twenty-five (25) other counties participating in the EHR collaborative, which aims to create a more integrated approach to county health information, technology, data collection, and reporting. This project will address the severe behavioral health workforce crisis by reducing documentation burden and improving provider satisfaction, retention, and behavioral health outcomes.

## BHSA Alignment and Sustainability

This multi-county Innovation project aligns with the Behavioral Health Services Act (BHSA) through a shared focus on meeting behavioral health workforce and technological needs in a rapidly changing and increasingly interoperable environment. The project also increases access to meaningful data to evaluate behavioral health service outcomes and equity. Following the Innovation funding period, Lake County intends to sustain key elements of the project by integrating dashboards and workflows into its standard operations so that infrastructure improvements remain embedded in the local behavioral health system. Additionally, the county may consider using BHSA administrative funding for continued analytics support.

## Statutory Requirements

**WIC Section 5830(a)(1)-(4):** This project seeks to increase the quality of mental health services, including measured outcomes; and promotes interagency and community collaboration related to Mental Health Services or supports or outcomes.

**WIC Section 5830(b)(2)(A)-(D):** This project meets Innovation criteria by making a change to an existing practice in the field of mental health, including but not limited to, application to a different population.

## Background

LCBHS has expressed increasing challenges with navigating the complexities of recent statewide reforms, such as the passing of Proposition 1 and ongoing Behavioral Health Transformation efforts. These require new planning, reporting, and accountability expectations that place significant demands on Lake County's limited administrative, workforce, and technological capacities.

Lake County states that without stronger data systems and more efficient documentation processes, they struggle with identifying unmet needs and monitoring service delivery, particularly in keeping pace with new BHSA requirements. Stakeholders consistently describe the existing behavioral health system as strained with limited capacity and gaps in continuity of services. Many programs, such as peer support, crisis services, and follow-up care, lack sufficient staffing to meet the county's high demand. These challenges are compounded by poor coordination across county programs and partners, which leads to inconsistent or incomplete care, particularly for those with co-occurring substance use disorders and/or experiencing homelessness.

CalMHSA has been leading an initiative to modernize and unify behavioral health across the state through the Semi-Statewide EHR Project. Currently, twenty-five (25) county behavioral health plans participate in this project using SmartCare, an EHR system developed by Streamline Healthcare Solutions. Through a phased two-part roll-out, this project seeks to tackle the severe behavioral health workforce crisis by streamlining workflows, reducing documentation burden, and ultimately improving provider satisfaction, retention, and care outcomes. As a small, rural community, Lake County's participation in this statewide Innovation model would allow invaluable access to expertise, analytics, and infrastructure that is otherwise difficult to obtain.

## How this Innovative Project Addresses the Problem

The EHR Project is a multi-county effort designed to translate complex state regulations into clear, practical tools that contribute to better, more positive client outcomes. Lake County prioritized this project because of ongoing challenges that include: lack of integrated systems and tools to support data-informed decision-making, cross-program coordination, and continuous quality improvement. Stakeholders emphasized that without stronger

infrastructure, data tracking, and operational workflows, the County risks falling behind on compliance and a reduction in staff capacity.

Phase 1 of the EHR Project identified several key challenges highlighting areas of improvement, such as the specific inefficiencies of the current electronic health record system and its inability to adapt to the requirements of evolving state policies. Provider burn-out and documentation burden were also commonly seen and noted as barriers that could be greatly reduced with implementation of restructured practices and procedures. Additionally, Phase 1 provided better insight into the needs of the Medi-Cal population and established expert guidance to assist counties with implementing critical policy changes.

Phase 2 will add two (2) new components that build on the lessons of the first phase while working in tandem with other statewide policy shifts, such as CalAIM, BH-CONNECT, and the Behavioral Health Transformation initiative. These efforts require counties to expand access to care and maintain fidelity to evidence-based practices (EBPs), particularly for individuals in the foster system, people experiencing homelessness, and those involved in the justice system.

## **Community Planning Process**

Across community meetings, surveys, and small-group discussions, stakeholders consistently pointed to challenges with system capacity, coordination, and long-term sustainability. While they praised Lake County's behavioral health system for its dedicated staff, strong crisis response, and peer-led support, they also noted strains due to workforce shortages, fragmented systems, and limited infrastructure.

As Lake County prepares for the BHSA transition and its first integrated three-year plan, stakeholders stress the need for better data systems, shared dashboards, and coordinated support efforts to assist the county with adjusting to new and changing regulations without sacrificing client-centered and community-driven care.

To inform the development of this Innovation project, Lake County carried out a thorough Community Program Planning Process (CPPP) that engaged consumers, family members, CBOs, community members, service providers, system partners, and individuals with lived experience, being sure to also reflect the county's cultural, racial, ethnic, and socioeconomic diversity. Engagement strategies included community planning meetings, a countywide community survey, and small group discussions.

The required 30-day public comment period for this Innovative project proposal occurred between February 17, 2026, and March 19, 2026, and was brought to the local behavioral health board on March 26, 2026. The project was approved by the Lake County Board of Supervisors on July 8, 2025.

## Learning Objectives and Evaluation

The EHR Project – Phase 2 seeks to examine the effectiveness of tools and infrastructure created during Phase 1 and supports counties with implementing key policies, while empowering them to leverage enhanced data tools and processes to drive system improvements. Two (2) primary project aims are indicated below.

### **Aim 1: Multi-County Policy Implementation Support**

This project will evaluate whether a coordinated science-based approach helps county plans more efficiently and consistently adopt and implement new state-mandated policies; standardize workflows and reduce fragmented local policy responses; and leverage shared training, learning platforms, and EHR configurations.

Specifically, CalMHSA seeks to answer the following learning question: *Does employing principles of implementing science via multi-county policy implementation support prepare county plans to more efficiently and effectively implement new initiatives, respond to new regulatory requirements, and adopt system-wide changes across their provider networks in a more standardized and complete way?*

### **Aim 2: Enhanced Data Analytics and Dashboarding**

This project will assess whether using enhanced analytic dashboards built on shared EHR data helps counties improve management of service delivery, fiscal health, and program operations; monitor quality, identify gaps, and make timely interventions; and implement effective, data-informed quality improvement efforts.

Specifically, CalMHSA seeks to answer the following learning question: *Does using a Learning Health System methodology via leveraging enhanced analytics dashboards allow county plans to more effectively manage the fiscal health, program operations, and service delivery of their provider networks and implement more effective quality assurance and improvement activities focused on their behavioral health benefit at the plan, program, and individual levels?*

To assess progress toward learning goals, CalMHSA will implement a comprehensive, mixed-methods evaluation, which will include existing data sources, surveys, and training participation tracking. This comprehensive evaluation intends on demonstrating how shared tools and coordinated support can drive more consistent, effective behavioral health policy implementation and service delivery improvements statewide.

CalMHSA will coordinate support across participating counties, manage evaluation activities, and ensure alignment with state initiatives and local needs. Furthermore, Streamline Healthcare Solutions LLC has been selected as the technology vendor responsible for the development, implementation, and maintenance of the semi-statewide EHR platform,

SmartCare. This partnership enables streamlined deployment of enhancements and standardized tools across counties.

## Budget

Lake County is requesting authorization to spend up to \$82,471.30 of MHSa Innovation funding for this project over a period of two (2) years. One hundred percent (100%) of the project will be supported by Innovation funding. The breakdown by fiscal year and expenditure category is as follows:

Category	FY 25-26	FY 26-27	Total
Personnel	\$ 0	\$ 0	\$ 0
Operations	\$ 0	\$ 0	\$ 0
Non-Recurring	\$ 0	\$ 0	\$ 0
Contracts & Consultants	\$ 37,798.50	\$ 44,672.80	\$ 82,471.30
<b>Total</b>	<b>\$ 37,798.50</b>	<b>\$ 44,672.80</b>	<b>\$ 82,471.30</b>

One hundred percent (100%) of proposed funds are allocated toward a contract with CalMHSa, which reduces the need for additional local overhead or indirect costs. The contract will include formal participation in the existing Electronic Health Record Innovation project, an enhanced analytics service, and administration and evaluation expenses. Details are as follows:

**Electronic Health Record** – CalMHSa provides participating counties with access to centralized project management and coordination, multi-county policy and procedure implementation support, shared training materials and tools, regulatory compliance guidance, executive leadership briefings, and reporting activities.

**Enhanced Analytics Service** – Includes the development, implementation, and ongoing refinement of “PowerBI” dashboards, which provide insights into service delivery, fiscal health, and program operations. Dashboards allow the county to monitor service utilization trends, track documentation compliance, identify demographic data gaps, support quality assurance, and monitor implementation related to other initiatives.

**Administrative and evaluation expenses** – Administrative and evaluation expenses include evaluation design and monitoring, dashboard usage and tracking, policy monitoring, and reporting to the Commission.

Additionally, LCBHS will dedicate existing internal staff and leadership resources to oversee the County’s participation in this project and ensure effective coordination with CalMHSa. This covers information technology, program and quality management, fiscal services, contract management, and executive leadership.

## **Conclusion**

Lake County's proposed Semi-Statewide EHR Project – Phase 2 appears to meet the minimum requirements listed under MHSa Innovation regulations and aligns with the goals of the BHSA.