SmartCare

Site Lead Kick-Off Meeting

San Diego County, System of Care

Thank You to our 625 Site Leads!

Who are we?

Timmy Paraskevopoulos

Angie DeVoss

Have a Question?

Enter in the chat

We will monitor and answer at the end of the session

Logistics

One Hour

Remain on mute

What are we doing?

Overview of Site Lead responsibilities and events leading up to 9/1 go-live and beyond

The Spectrum of Users

Totally on paper

Partially on paper

One EHR for the last 12 years

I work in multiple EHRs

Be agile, be flexible, bend, don't break…

- New EHR (est. 2023)
- From paper to electronic
- Not all answers at go-live
- We will work and rework as needed
- Training in 3 months may look different from training at go-live

Site Lead Responsibilities: Three Parts

Part I: Prior to Go-Live

1. LMS Training Modules
2. Site Lead Training
3. Explore the CalMHSA site for tip sheets, quick start guides, job aids, etc.

Part II: Go-Live Week

1. Attend once/twice daily check-in meetings
2. Troubleshooting, reporting and issue escalation
3. Assist onsite with Training support

Part III: Post Go-Live

1. Lessons Learned Close-out Meeting
2. 30-60-90 Day Meetings
3. Feedback and Review

Site Lead Responsibilities

Prior to Go-Live/September 1st:

❑Prepare site for go-live

  ❑Ensure they know where to go to access downtime forms

  ❑Print out client face sheets from CCBH and SanWITS

  ❑Show folks where to access documentation guidelines on CalMHSA site

❑Ensure you have completed and passed the mandatory CalMHSA LMS Modules for your role (by July 26th)

❑Attend Site Lead Training (week of July 29th)

❑Ensure users have completed mandatory CalMHSA LMS Modules by August 2 (Program Manager is primarily responsible)

Site Lead Responsibilities

During Go-Live: Week of September 1ˢᵗ

❑ We will provide you with a "Cheat Sheet" of helpful tips

❑ How to use AI (Artificial Intelligence) help tool, info button and other integrated user support help tools within the SmartCare application

❑ Self-help for resetting passwords

❑ Troubleshoot and triage issues and training needs

❑ Report out and communicate with County

❑ Escalate urgent issues and needs

Site Lead Responsibilities

After Go-Live:

❑Participate in "Project Close-Out/Lessons Learned" Debrief on September 17th

   ❑What went well

   ❑What could have been better

   ❑Take-aways for ongoing new hire training

❑Participate in 30-60-90-day check-in

   ❑30 minutes

   ❑60 and 90 day may be cancelled, based on need

Calendar of Go-Live Events

End User Training & Support

Applies to All Users (Site Leads included...)

Required
- All Users
- CalMHSA Videos
- Role Based
- Follow along in Train Domain
- Estimate 3-5 hours
- Due 8/2

Optional Training
- Live Instructor
- Level II Class
- Structured Agenda with Practice Scenarios
- In-Person (2-3 hours) or Online (90 min)

Optional Support
- Live Assistance
- 1:1 come prepared with questions
- No structure or agenda
- In Person (must schedule time) or Online (drop-in during set "office hours")

Go-Live: 9/1/24

Required Training: CalMHSA On-Demand "Moodle" Videos

Online Videos **+** Train Domain **=** Required for Go-Live
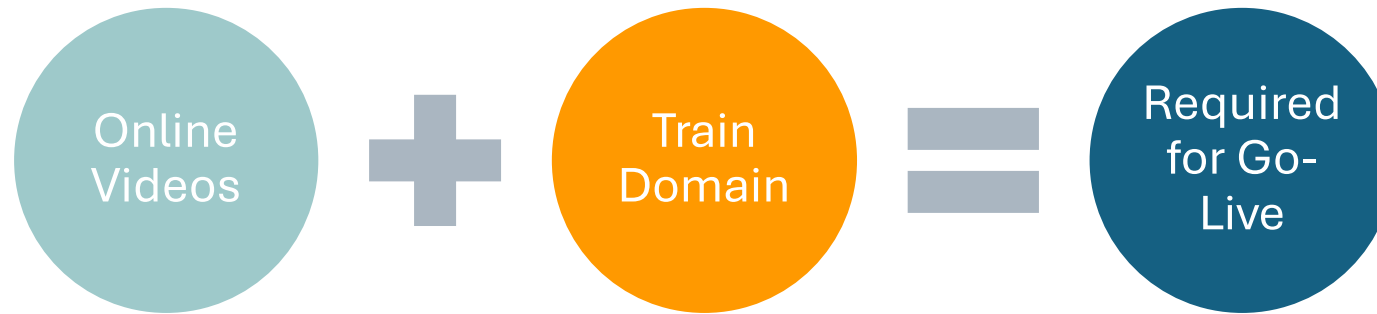
Benefits:

1. On-demand: no need to register according to a set schedule (certain days and times)
2. Short, broken down by individual workflows
3. Pause, speed up (x1.5, x2) or slow down videos as needed
4. Enable closed captioning **CC**
5. Can retake as many times as needed
6. Assigned by role*
7. Required for online account access by 9/1*

*Must be completed between **7/15 and 8/2**
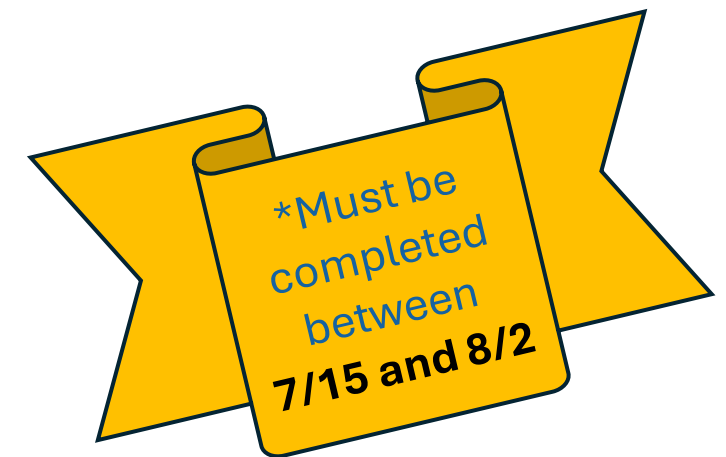
LMS & Train Support for All Users

7/15 to 7/26: MS Teams Office Hours Support for LMS & Train Login

Mon/Wed/Fri: 9:00 a.m. to 10:00 a.m.

Tues/Thurs: 3:00 p.m. to 4:00 p.m.
_____

Microsoft Teams Need help?

Join the meeting now

Meeting ID: **242 958 619 551**

Passcode: **gvydL5**

Join on a video conferencing device

Tenant key: 425899727@t.plcm.vc

Video ID: **116 482 585 61**
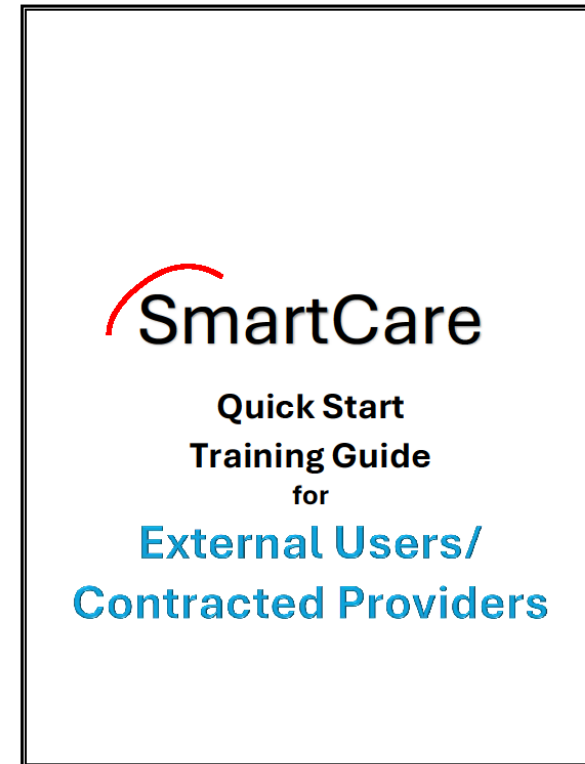
More info

For organizers: Meeting options

Org help

https://teams.microsoft.com/l/meetup-join/19%3ameeting_NDYyOWRlMTgtMGI0MC00YWMwLTlhMjktYzE0MjQyZjdkMDNi%40thread.v2/0?context=%7b%22Tid%22%3a%22db05faca-c82a-4b9d-b9c5-0f64b6755421%22%2c%22Oid%22%3a%222ffb1c0a-09d8-466f-9eea-1d2340cd4049%22%7d

SmartCare Training Quick Start Guides

SmartCare

Quick Start
Training Guide
For
County Users

SmartCare

Quick Start
Training Guide
for
**External Users/
Contracted Providers**

Train Domain Account: Contracted Providers

Contracted Providers
1. Remember to use the correct URL for contracted providers: https://sdmhsctt.smartcarenet.com/SanDiegoCntySmartcareTrain/Login.aspx
2. Use the correct email address which was registered for your account (the email address these instructions were sent to):
3. When sending the email to get your username *do not click on this link more than once*:

Train Domain Account: County

County
1. Be sure you are using the correct URL for county users: https://sdmhsctt.smartcarenet.com/SanDiegoCntySmartcareTrain/sso.aspx
2. The Username indicated here is your County username used to log into your device :

CalMHSA LMS Training Videos

How to Complete the Required CalMHSA Video Training

An email with the URL and instructions for accessing the Train Domain was sent to all users
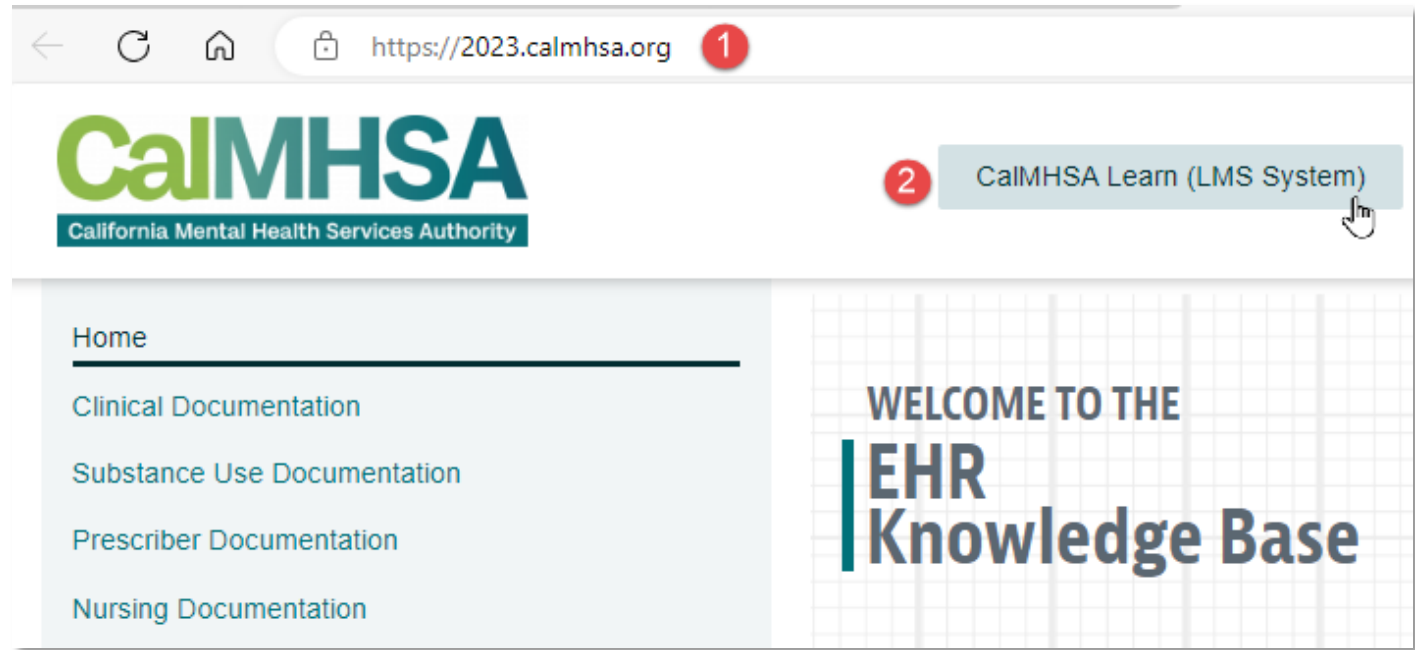
Between July 15ᵗʰ and August 2ⁿᵈ

1. Launch Google Chrome or MS Edge and go to https://2023.calmhsa.org/
2. Select the **CalMHSA Learn (LMS System)** button
3. Create an account and enroll for **SmartCare EHR Training**
4. Log into the **Train Domain**
5. Take all the Required LMS Training videos ***based on role.*** * while following along in the Train Domain

   ✓ Complete all assigned (by Role) LMS trainings by August 2, 2024
   ✓ Pass all course knowledge checks for assigned videos (minimum: 80%) by August 2ⁿᵈ
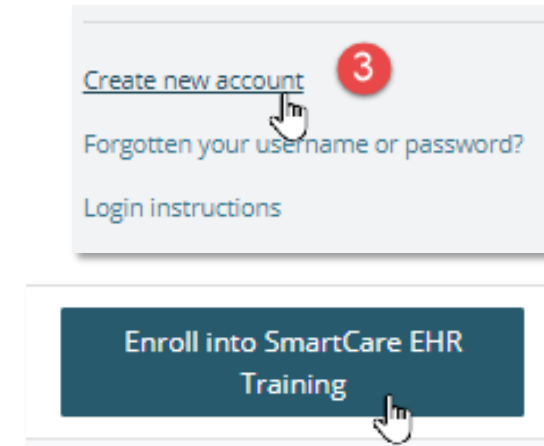
Seven Available Training Tracks

1. SmartCare Basics for All Users-100%
   a. A Message from our Executive Director: 33%
   b. Basic Navigation: 33%
   c. Privacy and Security in SmartCare: 33%

2. SmartCare Calendar Management for Providers 100%
   a. My Calendar Management for Providers:100%

3. SmartCare Clinical Workflow for Clinicians (Life Cycle of a Client): 100%
   a. Life Cycle of a Client: Requests for Services, Screening, and Intake & Assessment 33%
   b. Life Cycle of a Client: Services 33%
   c. Clinical Workflow Training 33%

4. SmartCare for Billing Staff 100%
   a. Billing: Adding Coverage & Eligibility 33%
   b. Billing: MMEF & UMDAP 33%
   c. Billing: Client Account and Charges/Claims 33%

5. SmartCare for Front Desk Staff 100%
   a. Front Desk Scheduling 100%

6. SmartCare for Group Service Providers 100%
   a. Group Set-up and Documentation 100%

7. SmartCare for Prescribers, Nurses, and Med Support Staff 100%
   a. Prescription Support Services 100%

https://moodle.calmhsalearns.org/my/

Make-Up of the CalMHSA LMS Videos

SmartCare Basics for All Users-100%

- a. A Message from our Executive Director: 33%
- b. Basic Navigation: 33%
- c. Privacy and Security in SmartCare: 33%

SmartCare Calendar Management for Providers 100%

- My Calendar Management for Providers:100%

SmartCare Clinical Workflow for Clinicians (Life Cycle of a Client): 100%

- a. Life Cycle of a Client: Requests for Services, Screening, and Intake & Assessment 33%
- b. Life Cycle of a Client: Services 33%
- c. Clinical Workflow Training 33%

SmartCare for Billing Staff 100%

- a. Billing: Adding Coverage & Eligibility 33%
- b. Billing: MMEF & UMDAP 33%
- c. Billing: Client Account and Charges/Claims 33%

SmartCare for Front Desk Staff 100%

- Front Desk Scheduling 100%

SmartCare for Group Service Providers 100%

- Group Set-up and Documentation 100%

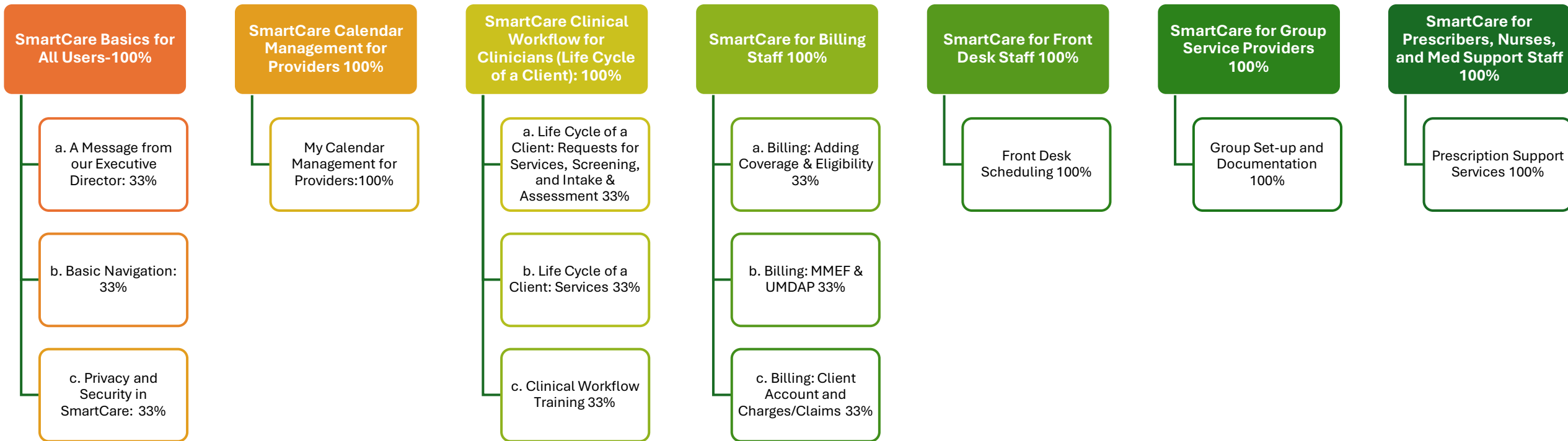**SmartCare for Prescribers, Nurses, and Med Support Staff 100%**

- Prescription Support Services 100%

Role-Based Training Requirements

Eight Roles*

- Admin Clerical Front Desk
- Clinical Direct Service
- Prescribers
- Nurses
- Residential and Crisis Residential**
- CSU**
- Admin Billing Only
- Program Managers CORs, QA

*Pending roles for SDCPH and Edgemoor
** In development

CalMHSA Required Training by Role: Must be completed between July 15th and August 2nd

Role*	Required CalMHSA online LMS Moodle Training Videos**				
Admin Clerical Front Desk (2 hours)	SmartCare Basics for All Users 100%	SmartCare for Front Desk Staff: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Servicers, Screening and Intake and Assessment		
Clinical Direct Service (3 ½ hours)	SmartCare Basics for All Users 100%	SmartCare Calendar Management for Providers: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Servicers, Screening and Intake and Assessment b. Life Cycle of a Client: Services	Clinical Workflow Training: 100%	SmartCare for Group Service Providers: 100%
Prescribers (4 hours)	SmartCare Basics for All Users 100%	SmartCare Calendar Management for Providers: 100%	SmartCare for Front Desk Staff: 100%	SmartCare for Prescribers, Nurses, and Med Support Staff: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client b. Life Cycle of a Client: Services
Nurses (4 hours)	SmartCare Basics for All Users 100%	SmartCare Calendar Management for Providers: 100%	SmartCare for Front Desk Staff: 100%	SmartCare for Prescribers, Nurses, and Med Support Staff: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: b. Life Cycle of a Client: Services
Admin Billing Only (90 minutes)	SmartCare Basics for All Users 100%				
Program Managers, CORs, and QA, (County and CBO) (4 ¾ hours)	SmartCare Basics for All Users 100%	SmartCare Calendar Management for Providers: 100%	SmartCare for Front Desk Staff: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: a. Life Cycle of a Client: Servicers, Screening and Intake and Assessment b. Life Cycle of a Client: Services	Clinical Workflow Training: 100%	SmartCare for Group Service Providers: 100%
Residential and Crisis Residential (90+ minutes)	SmartCare Basics for All Users 100%	Residential TBD			
CSU (90+ minutes)	SmartCare Basics for All Users 100%	CSU TBD			
SDCPH (90+ minutes)	SmartCare Basics for All Users 100%	SDCPH TBD			
Edgemoor (90+ minutes)	SmartCare Basics for All Users 100%	Edgemoor TBD			

*Times are estimates of the total time needed to complete the video modules shown for each role. This will vary for each user. Plan 3-5 hours.

**Percentages indicate you must take the entire module. Otherwise, if only part of the module is needed, the chapter name is provided.

Admin Clerical Front Desk	SmartCare Basics for All Users: 100%	SmartCare for Front Desk Staff: 100%	**SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client:** 33%
			a. Life Cycle of a Client: Requests for Services, Screening, and Intake and Assessment: 33%

Clinical Direct Service	SmartCare Basics for All Users: 100%	SmartCare Calendar Management for Providers: 100%	SmartCare Clinical Workflow for Clinicians- Life Cycle of a Client: 66%	Clinical Workflow Training 100%	SmartCare for Group Service Providers: 100%
			a. Life Cycle of a Client: Requests for Services, Screening, and Intake and Assessment: 33%		
			b. Life Cycle of a Client: Services: 33%		

Estimated Total CalMHSA LMS Video Training Time : 3 hours 26 minutes

Prescribers	SmartCare Basics for All Users:100%	SmartCare Calendar Management for Providers: 100%	SmartCare for Front Desk Staff: 100%	SmartCare for Prescribers, Nurses, and Med Support Staff: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: 33% b. Life Cycle of a Client: Services: 33%

Estimated Total CalMHSA LMS Video Training Time : 4 hours

Nurses	**SmartCare Basics for All Users:** 100%	**SmartCare Calendar Management for Providers:** 100%	**SmartCare for Prescribers, Nurses, and Med Support Staff:** 100%	**SmartCare Clinical Workflow for Clinicians-(Life Cycle of a Client)** 33%
				b. Life Cycle of a Client: Services: 33%

Estimated Total CalMHSA LMS Video Training Time: 3 hours 40 minutes

| **Admin Billing Only** | **SmartCare Basics for All Users:** 100% | TBD |

Program Managers, CORs, and QA, (County and CBO)	SmartCare Basics for All Users 100%	SmartCare Calendar Management for Providers: 100%	SmartCare for Front Desk Staff: 100%	SmartCare for Prescribers Nurses, and Med Support Staff: 100%	SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client: 66% a. Life Cycle of a Client: Requests for Services, Screening, and Intake and Assessment: 33% b. Life Cycle of a Client: Services: 33%	SmartCare for Group Service Providers 100%	Clinical Workflow Training 100%

Estimated Total CalMHSA LMS Video Training Time : 4 hours 45 minutes

Residential and Crisis Residential	SmartCare Basics for All Users: 100%	Residential TBD

Estimated Total CalMHSA LMS Video Training Time : TBD (minimum 1 hour 15 min)

CSU	SmartCare Basics for All Users: 100%	CSU TBD

Estimated Total CalMHSA LMS Video Training Time : TBD (minimum 1 hour 15 min)

| SDCPH | SmartCare Basics for All Users:100% | TBD |

Estimated Total CalMHSA LMS Video Training Time : TBD (minimum 1 hour 15 min)

| Edgemoor | SmartCare Basics for All Users: 100% | TBD |

Estimated Total CalMHSA LMS Video Training Time : TBD (minimum 1 hour 15 min)

SmartCare Training

Registering for Additional Training

[SmartCare Training (optumsandiego.com)](optumsandiego.com)

Regpack includes:

➤ Required Site Lead Training

➤ Optional End-User Training

COMING SOON!

Online Site Lead Training Dates

Monday 7/29	Tuesday 7/30	Wednesday 7/31	Thursday 8/1	Friday 8/2
9:00 a.m. to 11:30 a.m. Administrative	9:00 a.m. to 11:30 a.m. Clinical	9:00 a.m. to 12:00 p.m. Admin and Clinical	9:00 a.m. to 11:30 a.m. Clinical	9:00 a.m. to 12:00 p.m. Admin and Clinical
1:00 p.m. to 3:30 p.m. Clinical	1:00 p.m. to 4:00 p.m. Admin and Clinical	1:00 p.m. to 3:30 p.m. Administrative	1:00 p.m. to 4:00 p.m. Admin and Clinical	1:00 p.m. to 3:30 p.m. Administrative
N/A	**8:00 p.m. to 11:00 p.m. Admin and Clinical**	**8:00 p.m. to 11:00 p.m. Admin and Clinical**	N/A	N/A

Onsite Site Lead Training Dates

Monday 7/29	Tuesday 7/30	Wednesday 7/31	Thursday 8/1	Friday 8/2
9:00 a.m. to 11:30 a.m. Administrative	9:00 a.m. to 11:30 a.m. Clinical	9:00 a.m. to 12:00 p.m. Admin and Clinical	9:00 a.m. to 11:30 a.m. Clinical	9:00 a.m. to 12:00 p.m. Admin and Clinical
1:00 p.m. to 3:30 p.m. Clinical	1:00 p.m. to 4:00 p.m. Admin and Clinical	1:00 p.m. to 3:30 p.m. Administrative	1:00 p.m. to 4:00 p.m. Admin and Clinical	1:00 p.m. to 3:30 p.m. Administrative

FAQs

I see the go-live week is from September 1st to September 6th and as a Site Lead, I am to support my site during go-live week. Does that mean I have to work on Sunday September 1st or on the Labor Day Holiday on Monday September 2nd?

Site Leads are not expected to work outside of their normally scheduled shifts or typical working days and hours. Think of 9/1 as a "soft" go-live date. If your facility is not open on 9/1 or 9/2 then your site's go-live will be on the next business day 9/3

FAQs

Do the trainings have to be completed in one sitting, or does the system save your place and allow you to complete it over several days?

The system keeps track of your progress, so yes, the trainings can be completed over several hours or several days. We do recommend you try to complete an entire video or module before stopping to ensure you aren't struggling to pick up where you left off.

FAQs

I am going to be on vacation during the time of the Site Lead trainings. What can I do?

Please reach out to us and we will arrange to meet with you individually.

FAQs

We have a few new providers starting with us on 9/1 and a staff returning from leave 9/1---will they be going through the same online trainings when they start? I am guessing the 8/2 deadline for completing the trainings is just for current staff?

Yes, new staff/new hires will be taking the same online training from the CalMHSA site. Yes, the 8/2 deadline is for current staff.

We haven't fully built out what our post go-live new hire model will be yet, because we are trying to have some take-aways from the go-live. So, keep in mind that the new hire training model may evolve going forward.

FAQs

Is there any way for me to know if folks have completed training?

We are working out a process on how to get that information to you, more to come on this!

Help us...help *you!*

- What would help you support your site?

- What are your concerns or challenges?

- What issues can you anticipate now?

- What great ideas do you have?

Talk to Us!

✉ sdu_sdtraining@optum.com

☎ 800-834-3792, Option 4

🌐 https://forms.office.com/g/Lz6fDBfseB

Feedback Form: How did we do today?

- ➤ Rating scale
- ➤ Anonymous option
- ➤ Questions we didn't get to
- ➤ Anything you didn't feel comfortable sharing

https://forms.office.com/g/XHR54YMDeu

Site Lead Kick-Off Meeting Feedback Form

Meeting Date and Time: Jul 17, 2024 @ 10:00 a.m.

Please give us your feedback so we know if we hit...or missed, the mark!

Start now

Thank you!