| SmartCare Role | Description/Scope of Role | CalMHSA Learning Management System (LMS) Moodle Videos<br>Minimally Required LMS Modules by Role | | | | | Optional & Required Supplemental Live Training<br>Begins week of August 5. Both in-person (3 hours) or live virtual (90 minutes) options are available unless otherwise noted below. |
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| **Admin Clerical Front Desk**<br>(LMS estimate: 2 hrs) | Reception and Data Entry staff who add clients, schedule, and enter services and other non-clinical info. Includes programs who have their own EHR. | SmartCare Basics for All Users | SmartCare for Front Desk Staff | SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client:<br>a. Life Cycle of a Client:  Request for Services, Screening and Intake and Assessment | | | Supplemental Live Training is optional. |
| **Clinical Direct Service**<br>(LMS estimate: 3 ½ hrs) | LPHA/Clinicians AND non-LPHA who provide direct services and work under an LPHA, such as substance abuse counselors, and peer support specialists. | SmartCare Basics for All Users | SmartCare Calendar Management for Providers | SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client:<br>a. Life Cycle of a Client:  Services, Screening and Intake and Assessment<br>b. Life Cycle of a Client: Services | Clinical Workflow Training | SmartCare for Group Service Providers | Supplemental Live Training is optional. |
| **Prescribers and Nurses**<br>(LMS estimate: 4 hrs) | M.D., D.O., RN, LVN, P.A., N.P., etc. | SmartCare Basics for All Users | SmartCare Calendar Management for Providers | SmartCare for Front Desk Staff | SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client<br>b. Life Cycle of a Client: Services | SmartCare for Prescribers, Nurses, and Med Support Staff | | Supplemental Live Training is optional.  Additional e-prescribing training will be required and provided later in August (virtual-only). More information coming soon! |
| **Admin Billing Only**<br>(LMS estimate: 90 min) | Staff who handle billing functions for their program, such as clearing of suspense reports or preparing claims. | SmartCare Basics for All Users | | | | | Supplemental Live Training is highly encouraged as there is no CalMHSA LMS training specific to program billing workflows. This Training will focus on where to find and enter billing info. Further guidance on billing workflows to be provided by County Fiscal (BHS Billing Units for MH & SUD). |
| **Program Managers, QA, and CORs Teams***<br>(LMS estimate: 4 ¾ hrs) | Staff who need to know both admin and clinical workflows. *Note COR Team staff should take this LMS track only if they want to take the Supplemental Live Training; they may also follow 'Reporting' track below. | SmartCare Basics for All Users | SmartCare Calendar Management for Providers | SmartCare for Front Desk Staff | SmartCare Clinical Workflow for Clinicians-Life Cycle of a Client:<br>a. Life Cycle of a Client: Services, Screening and Intake and Assessment<br>b. Life Cycle of a Client: Services | Clinical Workflow Training | SmartCare for Group Service Providers | Supplemental Live Training is highly encouraged as there is no CalMHSA LMS training specific to managers.  This Training will highlight oversight tools in SmartCare, such as dashboards and reporting that will be helpful for those overseeing program operations and integrity. |
| **Residential, Crisis Residential, and CSU**<br>(LMS estimate: 90 min) | For program staff who will be using SmartCare as their EHR. | SmartCare Basics for All Users | | | | | **Supplemental Live Training is required** as there is no CalMHSA LMS Training or documentation for these modules.  This training will be scheduled August 26-30.  More information coming soon! |
| **Read Only**<br>(LMS estimate: 90 min) | Users who do not enter data but view and print, such as Jail Social Workers, SDCPH MDs, and medical records staff. | SmartCare Basics for All Users | While staff in Read Only roles may take additional CalMHSA LMS modules to familiarize themselves with the documentation they view, this is not required. | | | | Additional documentation supports for Read Only workflows are coming soon! |
| **Reporting**<br>(LMS estimate: 90 min) | Staff who run reports for their legal entity or multiple entities (i.e., UCSD or COR Teams*) | SmartCare Basics for All Users | While staff in Reporting ad Only roles may take additional CalMHSA LMS modules to familiarize themselves with the documentation they view, this is not required. | | | | Additional documentation supports for Reporting processes are coming soon! |