



**SmartCare**  
**Quick Start**  
**Training Guide**  
**for**  
**County of San Diego Users**

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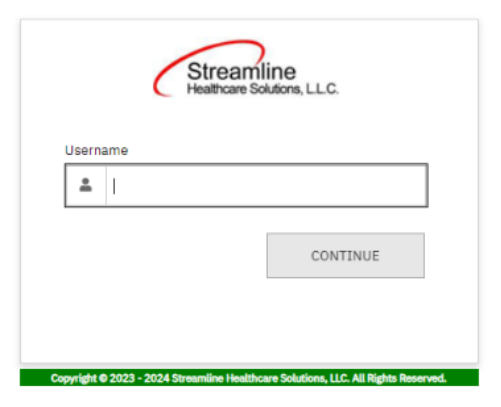
## Introduction

On September 1st, the County of San Diego outpatient/System of Care will replace their current EHR systems, Cerner Community Behavioral Health (CCBH) and SanWITS with a new EHR, **SmartCare**.

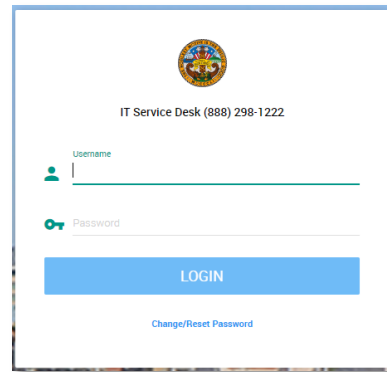
All SmartCare users are required to complete the CalMHSA online video training modules for [CalMHSA Learn \(LMS\) System](https://2023.calmhsa.org/) at <https://2023.calmhsa.org/> based on their role for the upcoming September 1<sup>st</sup> go-live. You have from July 15<sup>th</sup> to August 2<sup>nd</sup> to complete your training. If it is not completed by August 2<sup>nd</sup> you may not be granted access to the SmartCare live production environment by the September 1<sup>st</sup> go-live date. Please refer to the “CalMHSA Required Training by Role” document for details.

You can log in and utilize a Train domain while following along with the CalMHSA videos. The process for setting up your account in the Train domain is outlined below. *This process should take about 10 minutes.* Once you have completed the steps to set up your account in the Train domain, you can set up your account for the CalMHSA Learn LMS modules. Instructions are also included in this document.

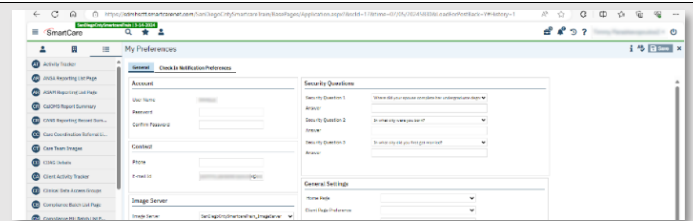
**Note:** these instructions are for users who have an email that ends with “@sdcounty.ca.gov” If you are you are a “Contractor-Operated Program User” please refer to that guide. You are creating two accounts for training: one for the Train domain (below) and a second account for the [CalMHSA Learn \(LMS\) System](https://2023.calmhsa.org/) site. If possible, we recommend using two screens, log into both accounts, watch the LMS videos on one screen while following along in the Train environment on the second screen to practice while completing the training. If you have more questions or need assistance, please email [BHS\\_EHRProject.HHSA@sdcounty.ca.gov](mailto:BHS_EHRProject.HHSA@sdcounty.ca.gov)

Setting up your SmartCare Train Domain Account: County of San Diego Users	
Step	Image
<p>1. Launch <b>Google Chrome</b> or <b>MS Edge</b>*</p> <p>*These are the only supported Internet browsers</p>	
<p>2. Copy and paste the following URL in your address bar:</p> <p><a href="https://sdmhsctt.smartcarenet.com/SanDiegoCountySmartcareTrain/sso.aspx">https://sdmhsctt.smartcarenet.com/SanDiegoCountySmartcareTrain/sso.aspx</a></p> <p>This will launch the SmartCare Train domain login window.</p> <p>3. Enter your County username and select <b>Continue</b></p>	 <p><b>Note:</b> <i>Streamline</i> is the parent company that developed the <b>SmartCare</b> EHR system that is replacing CCBH/Cerner and SanWITS.)</p>

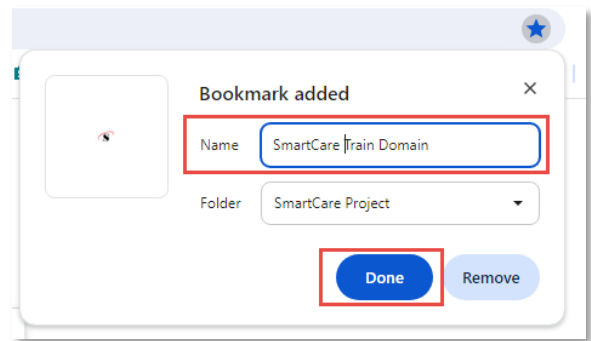
4. If presented with the following screen, use the Akami MFA to **Login** using your county login and password information. Select **Login**.



You will be redirected to the **SmartCare** landing page. You can now use this Train Domain to follow along with the [CalMHSA Learn \(LMS\) System](#) Training videos and complete your required training.




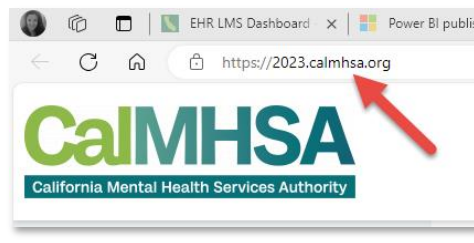
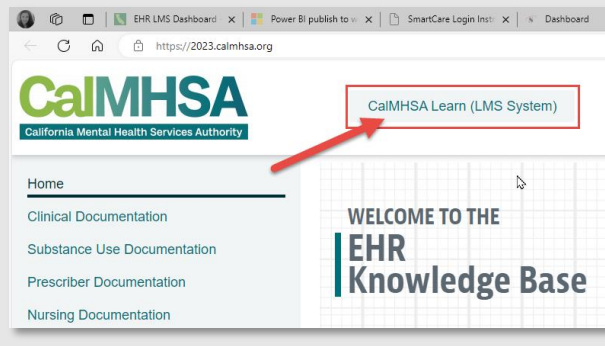
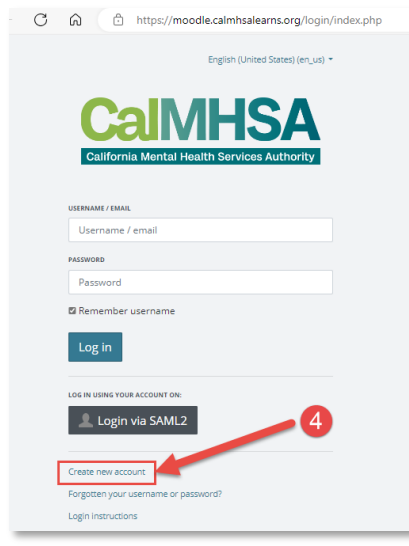
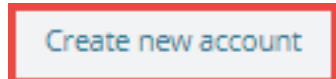
**ProTip:** Bookmark or “favorite” this link and name it “**SmartCare Train Domain**” so you can easily find it.



# Overview of the SmartCare LMS

This Tip Sheet is designed to help you understand where to locate training materials and how to register for the LMS modules (a.k.a. training videos on their Moodle Learning Management System or LMS platform) and how to complete the trainings. As a reminder, completion of the necessary LMS modules is required by 8/2/2024 for accounts to be built for the SmartCare by go-live by 9/1/2024.

## Creating a New CalMHSA Learn (LMS System) Account

1. Launch <b>Google Chrome</b> or <b>MS Edge</b>	
2. Log into CalMHSA site <a href="https://2023.calmhsa.org">https://2023.calmhsa.org</a> or site <a href="#">Home - 2023 CalMHSA</a>	
3. From the options at the top, select the <b>CalMHSA Learn (LMS System)</b> link.  It will open a new tab for you with the login page.	
The first time you log in, you will need to create a new account.  4. Select the link for <b>Create new account</b>	 

5. Enter in the information to create a new account.

Note: The password requirements are:

- a. Minimum of 8 characters
- b. At least 1 numerical digit
- c. At least 1 lower case letter
- d. At least 1 upper case letter
- e. At least 1 special character (\* - #)

The screenshot shows the 'New account' form on the CalMHSA website. The form includes fields for USERNAME, PASSWORD, EMAIL ADDRESS, EMAIL (AGAIN), FIRST NAME, SURNAME, CITY/TOWN, COUNTRY (a dropdown menu), COUNTY OF EMPLOYMENT, ROLE, and EMPLOYMENT. Each field has a red information icon to its right. Below the form, there are three dropdown menus for 'COUNTY OF EMPLOYMENT', 'ROLE', and 'EMPLOYMENT'. The URL in the browser is https://moodle.calmhsalearns.org/login/signup.php.

6. At the bottom of the form, place a **checkmark** next to the **“I’m not a robot”** security question.

7. Select the **Create my new account** button to complete the process.



Return to the login screen and log in by entering

- 8. Username/email
- 9. Password
- 10. Check the **“Remember username”** option
- 11. **Log in** button

# CalMHSA

California Mental Health Services Authority

USERNAME / EMAIL

8

PASSWORD

9

Remember username

10

11

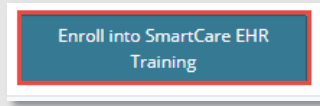
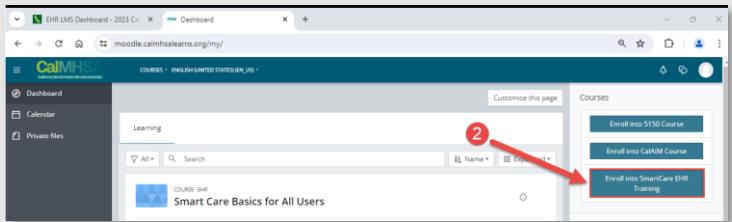
LOG IN USING YOUR ACCOUNT ON:

# Enrolling for and Completing the LMS Training

1. Log into the CalMHSA site and select the **CalMHSA Learn (LMS System)** link at the top of the page. This will take you to the LMS Dashboard.

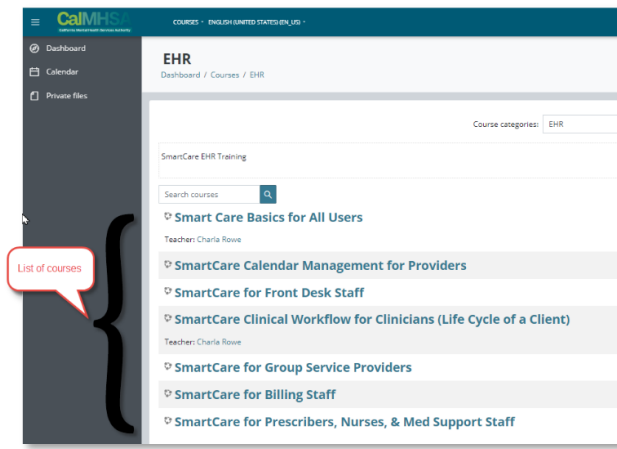


2. From the Dashboard, select the button to the right **Enroll into SmartCare EHR Training**



This will take you to the list of courses.

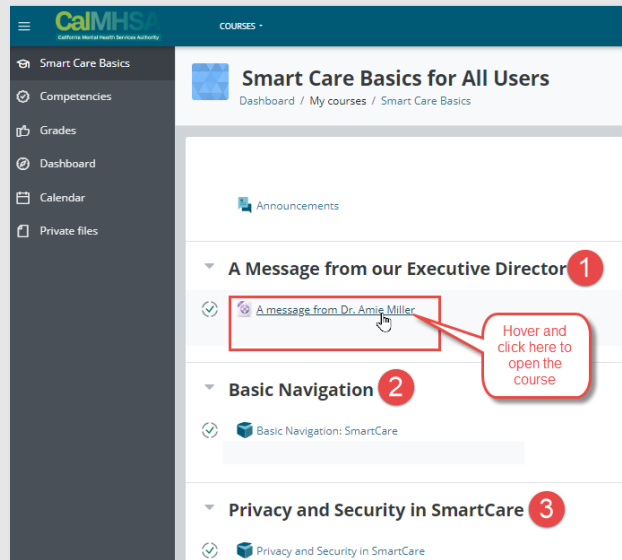
3. All users must take the **SmartCare Basics for All Users**. Select this link first.



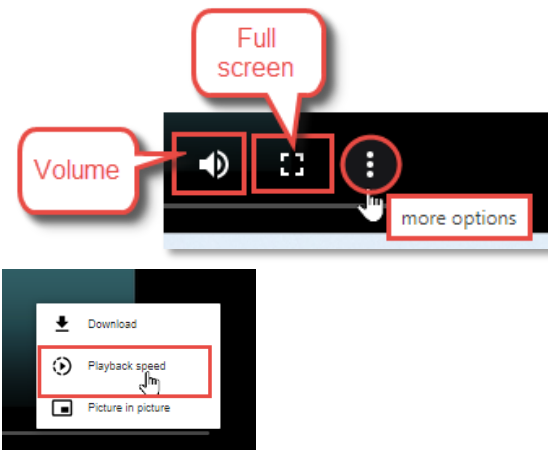


4. Some courses may consist of a single module, or up to three. This course has three modules. To launch the first module, hover over and click the hyperlink shown here. The video will launch immediately.

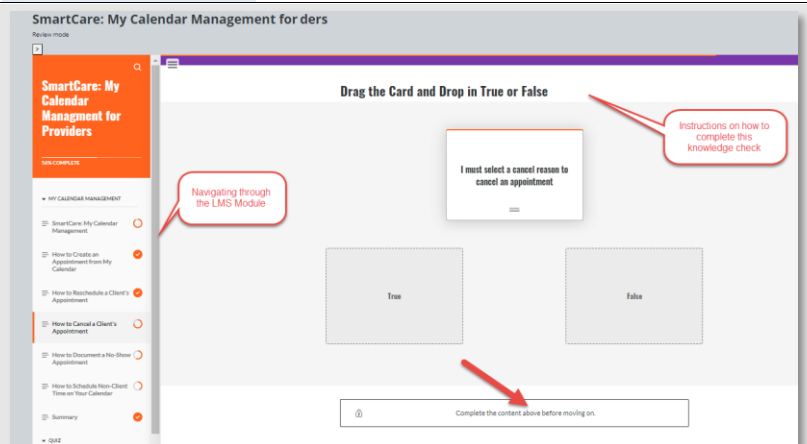
All users will need to complete all three sections of *this* module, however, depending on your role, you may only need to complete certain modules or certain sections of certain modules for certain roles. Please refer to the **CalMHSA Required Trainings by Role** document at the end of this Tip Sheet for more information.



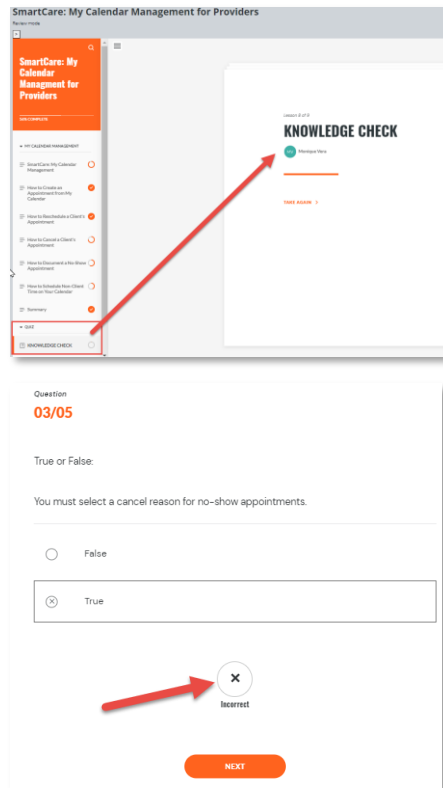
5. In addition to pausing and stopping the video, you can adjust the volume, view in full screen, by selecting the **more options icon** you can adjust the playback speed.




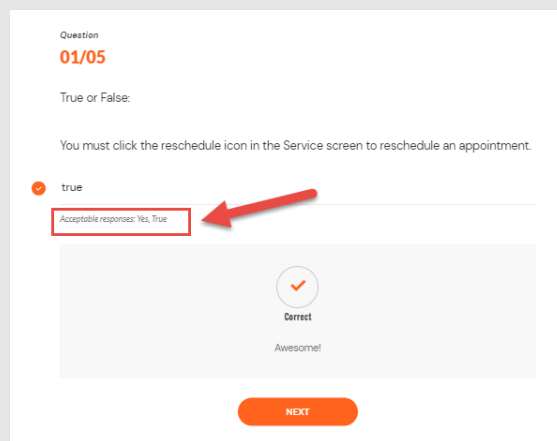
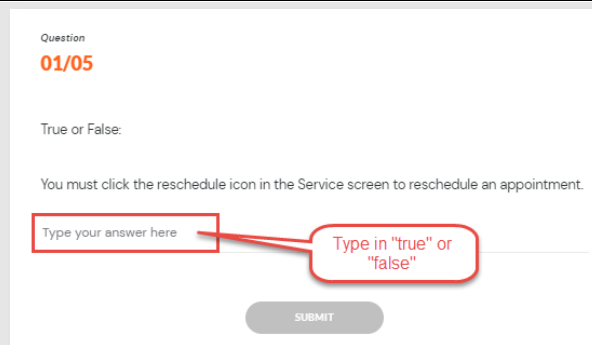
6. Some modules will include “Knowledge Checks” (interactive questions or components) that must be completed before you can continue. The directions are typically included on the screen.



7. At the end of most modules, you will need to complete a Quiz.  
Please note:
- The quizzes are generally short (less than 10 questions each)
  - The system will tell you immediately if you answered the question correctly or not.
  - You will receive a score at the end of the quiz. You must pass **with at least 80% to pass the quiz and obtain credit for the module.**
  - You can retake the quiz as many times as you need in order to pass.
  - The questions and answers are scrambled each time you retake a quiz.



8.  **Pro Tip:** Many of the True/False questions are not built as radio buttons but as “fill in the blanks.”
- For these, be sure to key in “true” or “false” only. Answers such as “yes” or “correct” may be marked as “incorrect.”



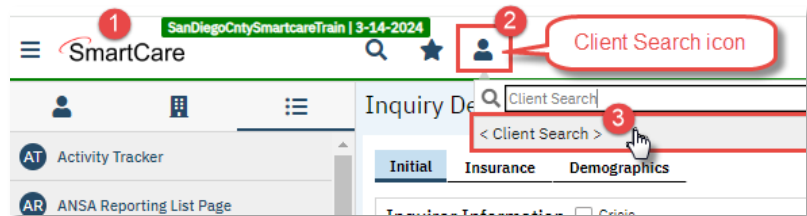
## Creating a “Fake Client” for Training Purposes

If your workflow doesn't typically require you to create a client profile in the system, you may not be assigned a module which shows you how to do this, therefore, making it hard to follow along with the training modules in the Train domain. The following steps are designed to help you create a “fake client” in the Train domain for training purposes.

**Important:** these steps were developed exclusively for the Train domain, for searching and quickly creating a fake client in the Train domain. They do not follow the proper protocol for search or creating a client in the live production domain. For that process you will need to refer to your standard department policies and workflow and whether this is in the scope of your work.

1. Log into **SmartCare**.
2. Select the **Client Search** icon
3. Click to select the **<Client Search>** option you see on the top of the first line.

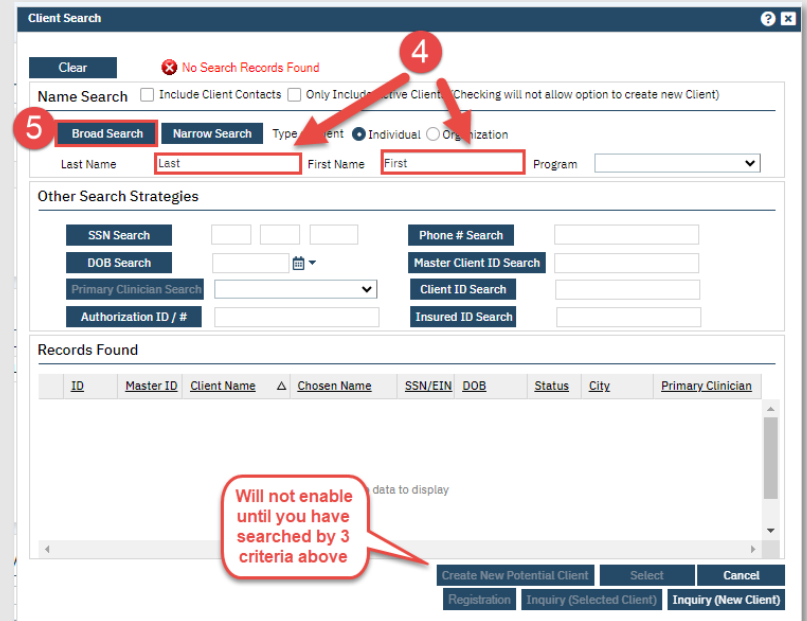
This opens the **Client Search** window.



You must search by a minimum of three criteria before you can create a new client. Any three fields (name, phone DOB, Client ID, etc.) are acceptable.

4. Enter the last and first name in the fields. You can also search for partial first and last name(s).
5. Click to select **Broad Search**.

The search results will display in the **Records Found** section towards the bottom of the window.



6. If there are no matches based on name, search by two more selections:
7. Enter the **SSN** and then select the **SSN Search** button
8. Enter the **DOB** and then select the **DOB Search** button
9. If the client is not already in the system, click on **Create New Potential Client** on the bottom right.

Client Search

Clear

Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search  Narrow Search Type of Client  Individual  Organization

Last Name Last First Name First Program

Other Search Strategies

SSN Search 999 99 9999  Phone # Search

DOB Search 12/08/2000  Master Client ID Search

Primary Clinician Search  Client ID Search

Authorization ID / #  Insured ID Search

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/FIN	DOB	Status	City	Primary Clinician
1007	1007	First, Client		9999	10/09/19...	Active		
1008	1008	Smart, Client		9999	07/01/20...	Active		

10. Select **Yes** at the **Confirmation Message** window.

Confirmation Message

Are you sure you wish to create a new Client?

This is where the system will generate a **Client ID**. Write it down so you can search by it while training.

Client Information

General Aliases Demographics Financial Release of Information Log Contacts Family External Referral Custom Fields

General Information

Type of Client  Individual  Organization

Client ID 1009 SSN 9999 Modify... Do Not Use Do Not Use

Prefix First Name First Middle Name Last Name Last Suffix

E-Mail Medi-Cal ID  Active Professional Suffix

Medicare Beneficiary ID

Patient Portal ID

Phone Numbers

Business  DNC  DNLM

Business 2

Fax

Home

Addresses

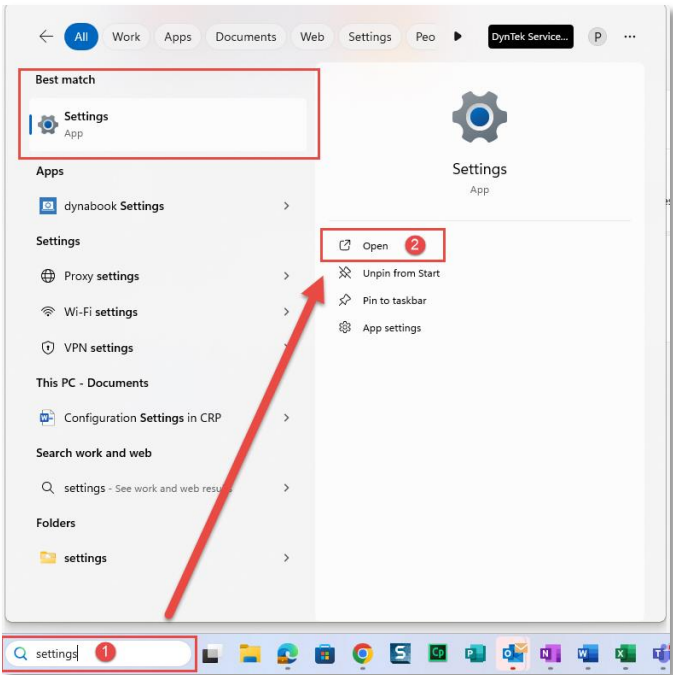
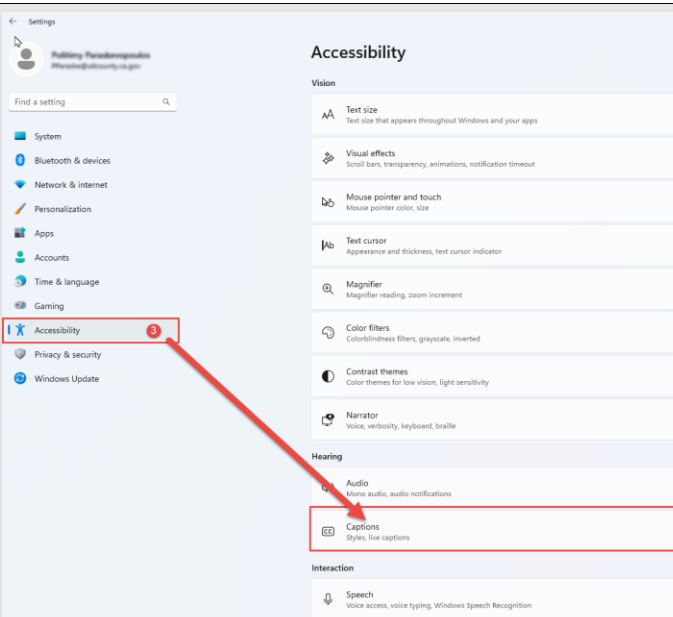
Home  Billing

Comment

List any special needs or considerations important to note about the client

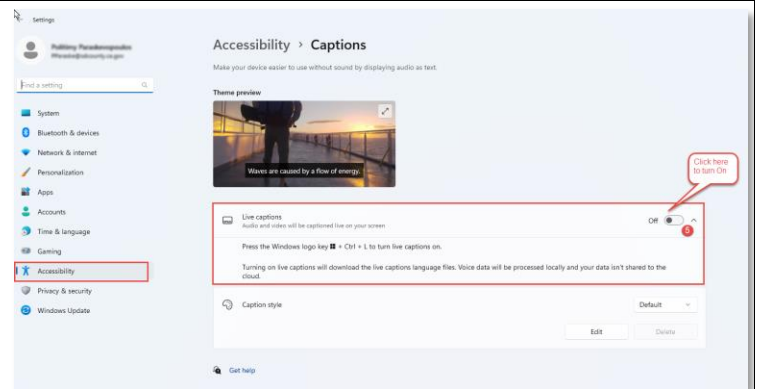
# Using Microsoft Accessibility Settings to Enable Closed Captions

For users who prefer to view videos enabled with closed captions or a transcript of the audio, you can enable this functionality using Microsoft settings on your device or by enabling them using your Chrome web browser.

Step	Image
<ol style="list-style-type: none"><li>1. In the search window of your device, enter the search term "settings."</li><li>2. Click to open the <b>Settings</b> application.</li></ol>	 <p>A screenshot of the Windows search interface. The search bar at the top contains the text "settings". Below the search bar, the "Best match" section shows the "Settings" app icon. A red box highlights the "Settings" app. In the "Apps" section, the "Settings" app is listed with a red box around the "Open" button. A red arrow points from the "Open" button to the "Settings" app icon in the "Best match" section. The taskbar at the bottom shows the search bar with "settings" and a red box around it.</p>
<ol style="list-style-type: none"><li>3. From <b>Settings</b>, select the <b>Accessibility</b> link.</li><li>4. Select the caret &gt; to open <b>Captions</b>.</li></ol>	 <p>A screenshot of the Windows Settings application, specifically the "Accessibility" page. The left sidebar shows the "Accessibility" link highlighted with a red box and a red arrow pointing to it. The main content area shows the "Accessibility" settings. Under the "Hearing" section, the "Captions" option is highlighted with a red box and a red arrow pointing to it. The "Captions" option has a red box around the right-pointing arrow next to it.</p>

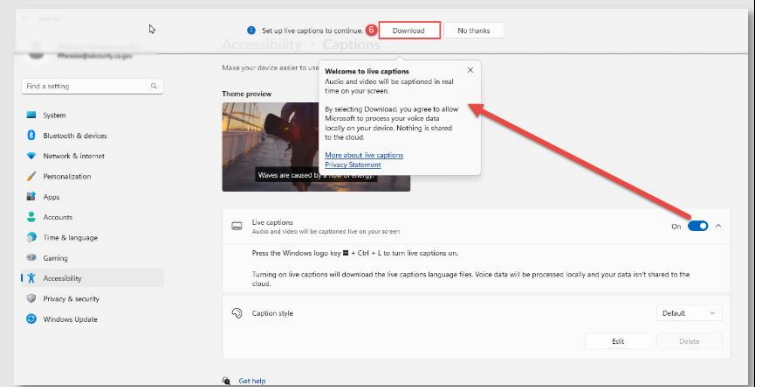
This will open the **Captions** window. The **Live Captions** setting will be set to **Off** by default.

5. Select the toggle button to move it from Off to **On**

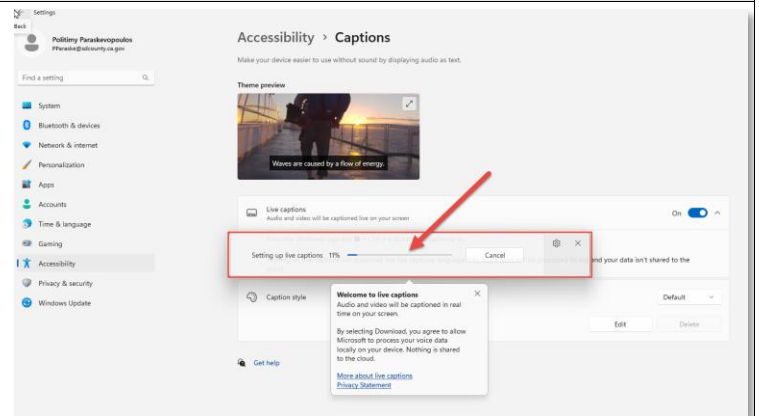


If this is the first time you are enabling the **Live Captions** option, you will be prompted to download the software. This should *not* require Admin credentials

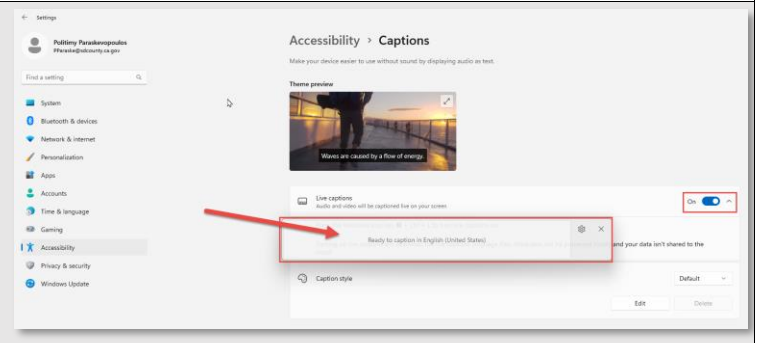
6. Select **Download**



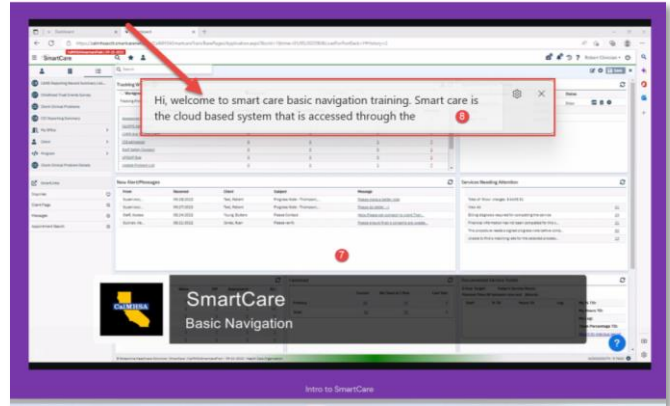
A progress bar will appear during the download process.



Once the download is complete, a movable caption bar will appear floating on the top of your screen as long as the **Live Captions** toggle is set to **On**.

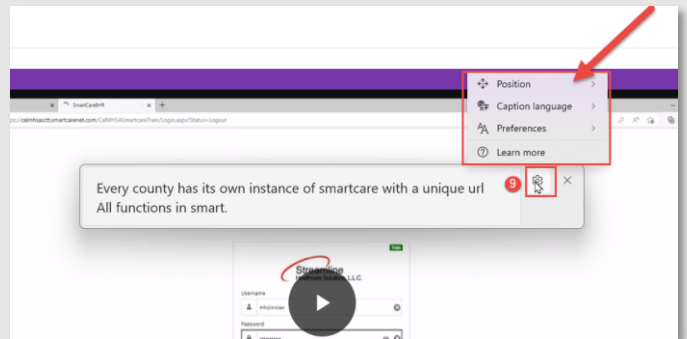


7. Launch any video that has audio.
8. As the audio plays, you will see the captioning appear in real time in your caption bar.

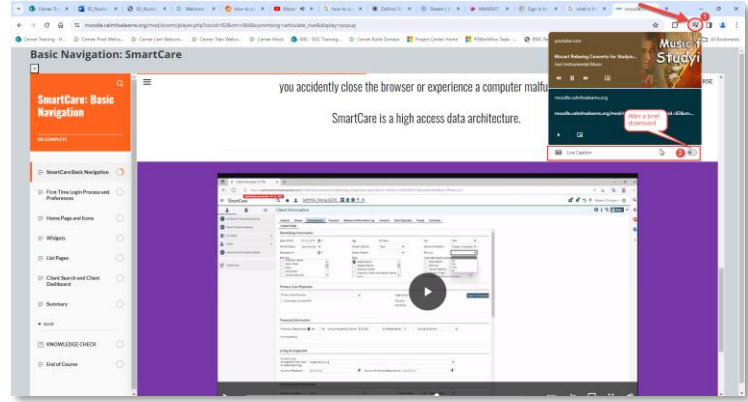
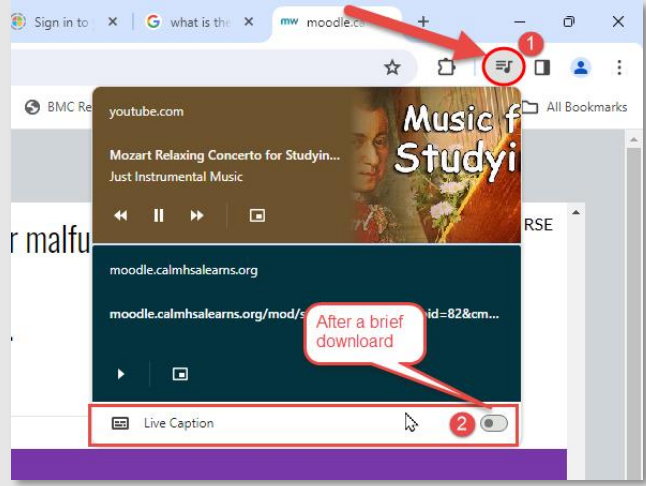
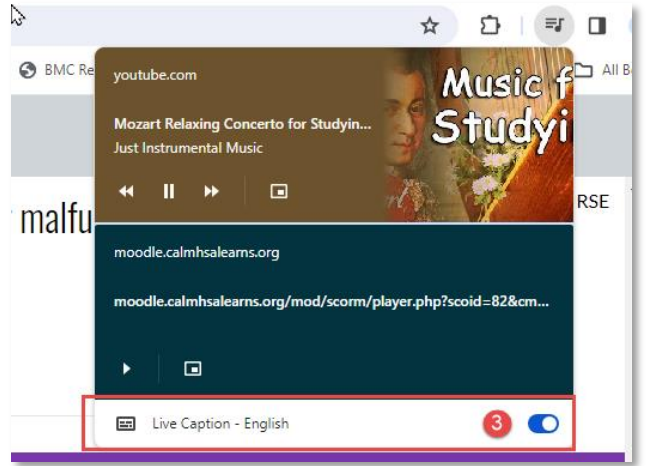


You can move the bar anywhere on your screen.

9. The settings on the toolbar offer other preferences so you can customize to your liking.



# Using Chrome Browser Music Controls to Enable Closed Captions

Step	Image
<p>1. Launch <b>Chrome</b> Internet browser to view your video. In the upper right side of the screen, click the icon with a music note. 🎵</p> <p>This will open the Chrome music controls</p>	
<p>At the bottom right of this window, you will see a toggle for <b>Live Captions</b>. It will be defaulted to off.</p> <p>2. Click the toggle so it enables.</p> <p>The software will download in approximately 10 seconds.</p>	
<p>3. Now the toggle will show as "on" and a live captions bar will appear on your screen on top of your video.</p>	



4. Once you play your video, the live captioning will appear on your screen in real-time with the spoken words.

There are options in the upper right of the live captioning window you can use to customize your experience. To close the window, select the **X**.

