SmartCare

Quick Start

Training Guide

for

Contractor-Operated Program Users
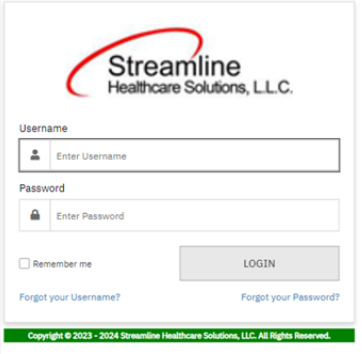
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Introduction

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 at https://2023.calmhsa.org/ *based on their role* for the upcoming September 1st go-live. You have from July 15th to August 2nd to complete your training. If it is not completed by August 2nd you may not be granted access to the SmartCare live production environment by the September 1st 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.
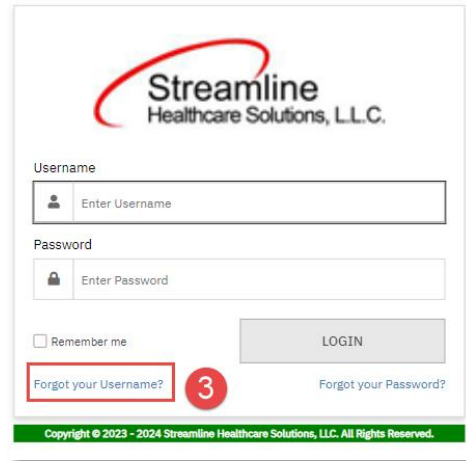
Note: these instructions are for Contractor-Operated Program Users. If you are a County of San Diego employee (your email ends with **"@sdcounty.ca.gov"**) refer to the County of San Diego Users guide. You are creating two accounts for training: one for the Train domain (below) and a second account for the CalMHSA Learn (LMS) System 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**

Setting up your SmartCare Train Domain Account: Contractor-Operated Program Users	
Step	**Image**
1. Launch **Google Chrome** or **MS Edge*** **These are the only supported Internet browsers	
2. Copy and paste the following URL in your address bar: https://sdmhsctt.smartcarenet.com/SanDiegoCntySmartcareTrain/Login.aspx This will open the SmartCare Train domain login screen. ***Note: Streamline*** *is the parent company that developed the* ***SmartCare*** *EHR system that is replacing CCBH/Cerner and SanWITS.)*	

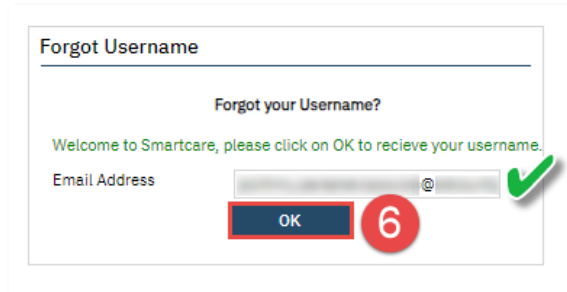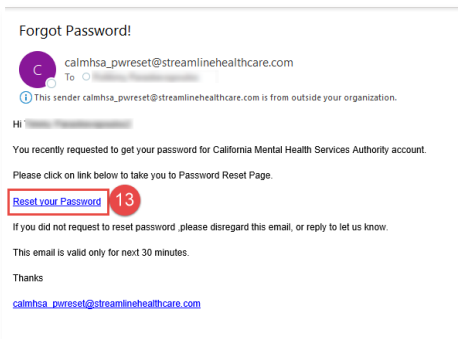|	
You will first need to retrieve your username from the system and then create a password. 3. Select the **Forgot your Username?** hyperlink shown here	
A **Forgot Username** pop up window will appear. *4.* Enter your **Email Address** *(the email registered to your account is the same email address these instructions were sent to)* 5. Click anywhere in the white space outside the **Forgot Username** box	
The **Forgot Username** window will appear again, *without* the **Security Question** and **Security Answer** box seen above. A welcome message will appear and the email address you just entered should be pre-populated. 6. Click the **OK** button. This will send an email to your inbox.	
Go to your email inbox and locate the email from "calmhsa" with the subject line "Forgot Username!" shown here. (Check your Junk mail if you don't see it.) 7. Click on the **Get Your Username** hyperlink in the email. ***Do not*** click on this link more than once, otherwise you will get an error message and will have to restart the process from the beginning.	
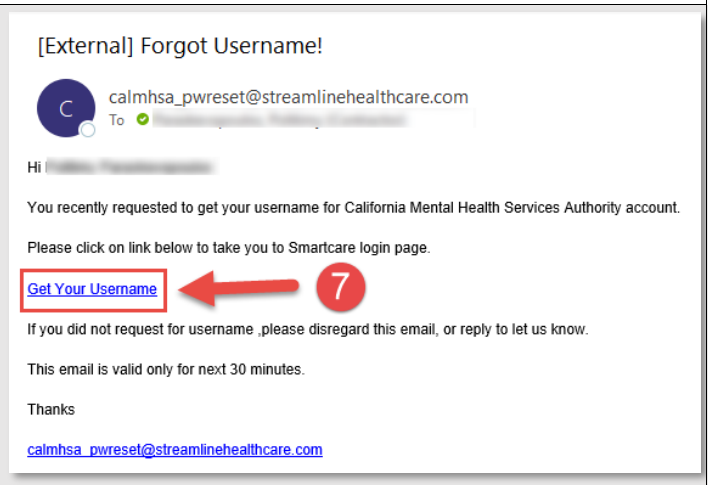
A new tab will open with the login window and your username will be prepopulated.

*Important: you need to remember this username!

Now you will need to create a password for the account.

8. Click the **Forgot your Password?** hyperlink shown here.

A **Forgot Password** pop up window will appear.

9. Enter your **Email Address**

10. Click anywhere in the white space outside the **Forgot Password** box

The **Forgot Password** window will appear again, without the **Security Question** and **Security Answer** box seen above.

A welcome message will appear and the email address you just entered should be pre-populated.

11. Click the **Reset** button.

12. You will receive a confirmation message stating that an email was sent to your email address.

Go to your email box and retrieve the email from "calmhsa" with the subject line "Forgot Password!" shown here. 13. Click on the **Reset your Password** link in the email.	**Forgot Password!** C calmhsa_pwreset@streamlinehealthcare.com To ⓘ This sender calmhsa_pwreset@streamlinehealthcare.com is from outside your organization. Hi You recently requested to get your password for California Mental Health Services Authority account. Please click on link below to take you to Password Reset Page. Reset your Password 13 If you did not request to reset password ,please disregard this email, or reply to let us know. This email is valid only for next 30 minutes. Thanks calmhsa_pwreset@streamlinehealthcare.com
The link will redirect you to the **Change Password** screen shown here. 14. Enter your desired password in the **New Password** free text box 15. Reenter the password to confirm they match. 16. Select **OK**	**Change Password** New Password •••••••••••••• 14 Confirm Password •••••••••••••• 15 16 OK
The login screen will appear again. 17. Enter your **Username** 18. Enter the **Password** you just created 19. For ease of future use, select the **Remember me** checkbox 20. Select **Login**	**Streamline** Healthcare Solutions, L.L.C. Username 👤 ▮▮▮▮▮ 17 ✕ Password 🔒 •••••• 18 👁 ✕ 19 ☑ Remember me LOGIN 20 Forgot your Username? Forgot your Password? Copyright © 2023 - 2024 Streamline Healthcare Solutions, LLC. All Rights Reserved.
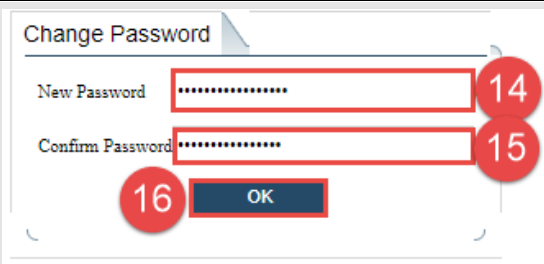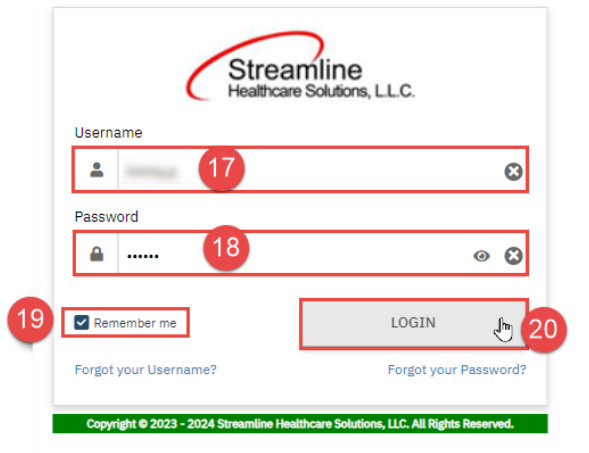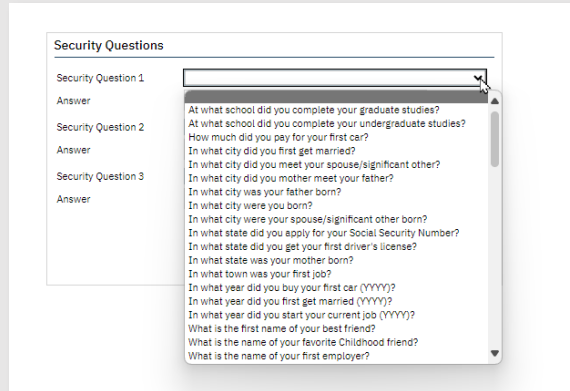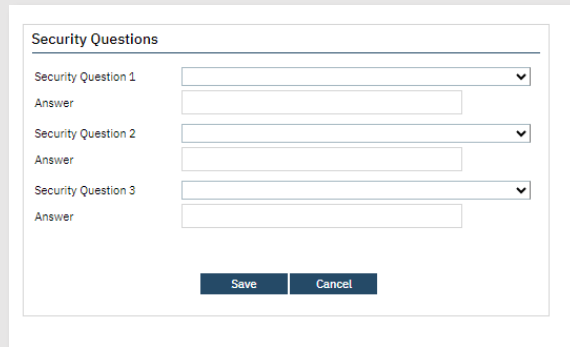
You will be presented with the **Security Questions** pop up window.
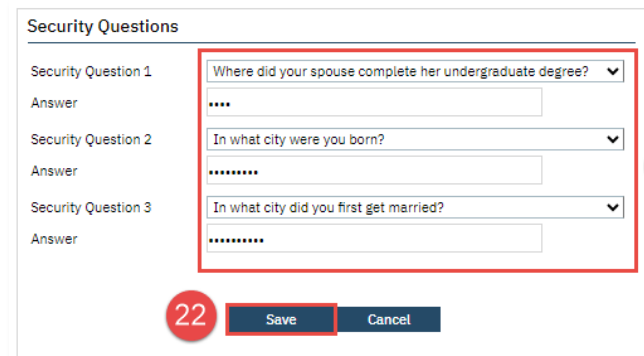
You must select *three different security questions* from the dropdown options and enter the answers for each.

Remember the security questions and answers you choose as they will be presented to you when you want to reset a password, or if you forget your login ID.
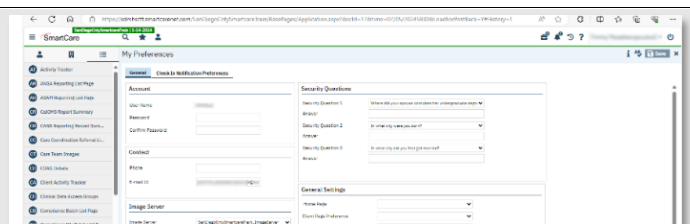
21. Enter the answers to your three chosen security questions.

22. Select **Save**

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.
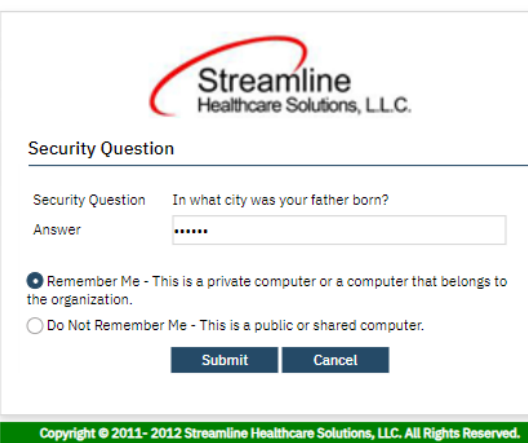
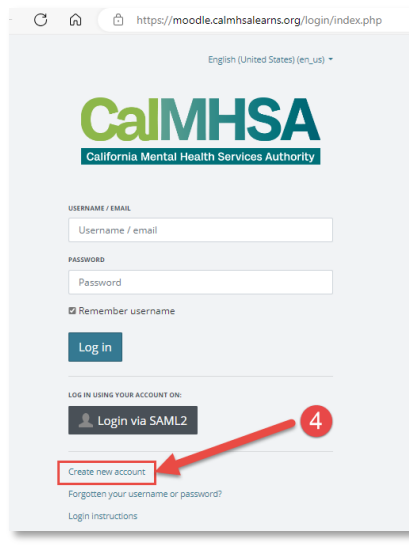|	
When logging in to the SmartCare Train Domain in the future, your username will be prepopulated if you selected the **Remember me** checkmark above.	
If you forget your **Username** or **Password** there are hyperlinks to help you. It will email you and you will need to answer a security question.	
ProTip: Bookmark or "favorite" this link and name it "**SmartCare Train Domain**" so you can easily find it.	
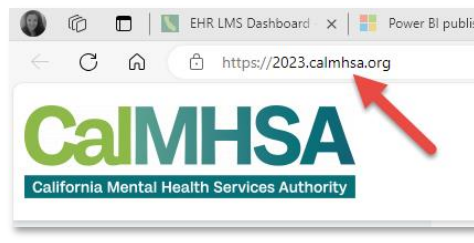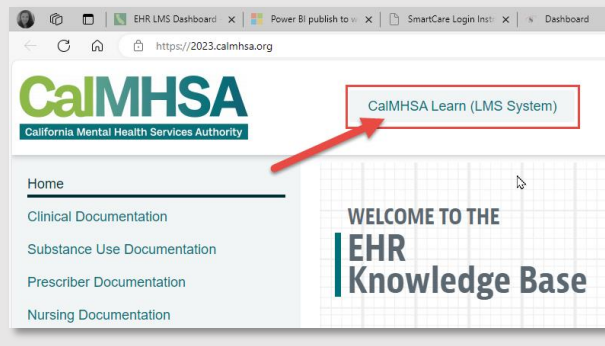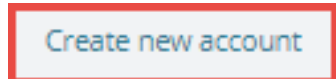
Overview of the SmartCare LMS

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 **Google Chrome** or **MS Edge**	
2. Log into CalMHSA site https://2023.calmhsa.org or site Home - 2023 CalMHSA	
3. From the options at the top, select the **CalMHSA Learn (LMS System)** 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 **Create new account**	

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 (* - #)	

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	

English (United States) (en_us) ▼

CalMHSA
California Mental Health Services Authority

USERNAME / EMAIL

8 [username field]

PASSWORD

9 [password field]

☑ Remember username **10**

11 Log in

LOG IN USING YOUR ACCOUNT ON:

👤 Login via SAML2

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**
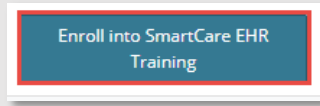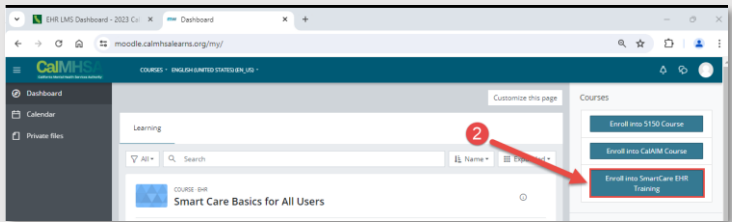
This will take you to the list of courses.

3. All users must take the **SmartCare Basics for All Users**. Select this link first.
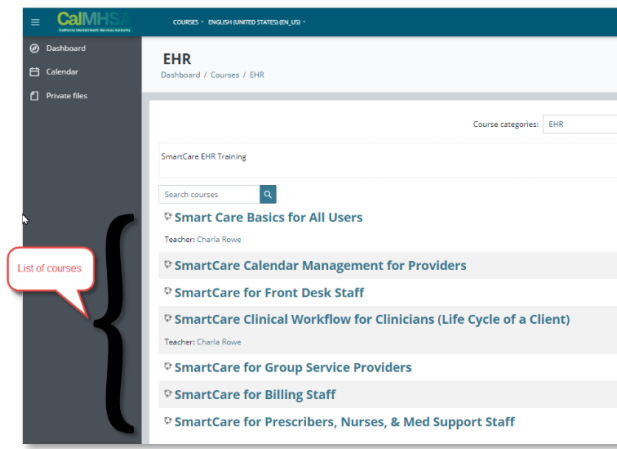
4. Some courses may consist of a single module, or up to three. This course has three modules. To launch the first module, hover over and click the hyperlink shown here. The video will launch immediately. All users will need to complete all three sections of *this* module, however, depending on your 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.	
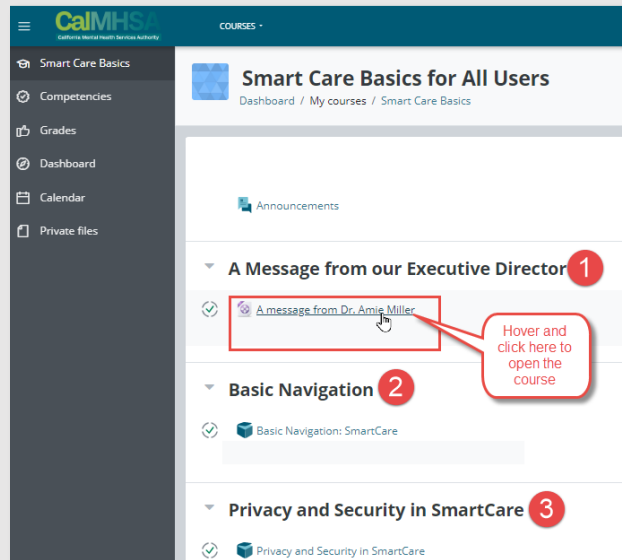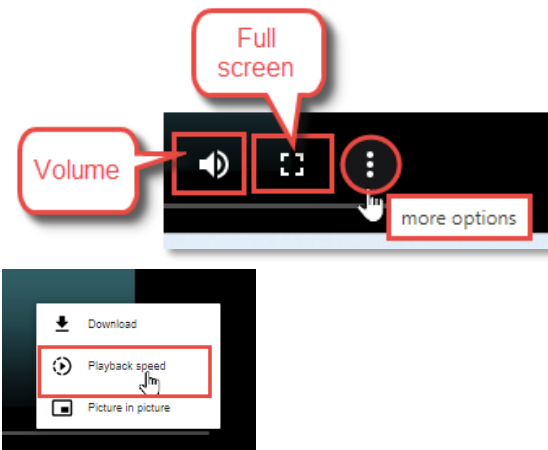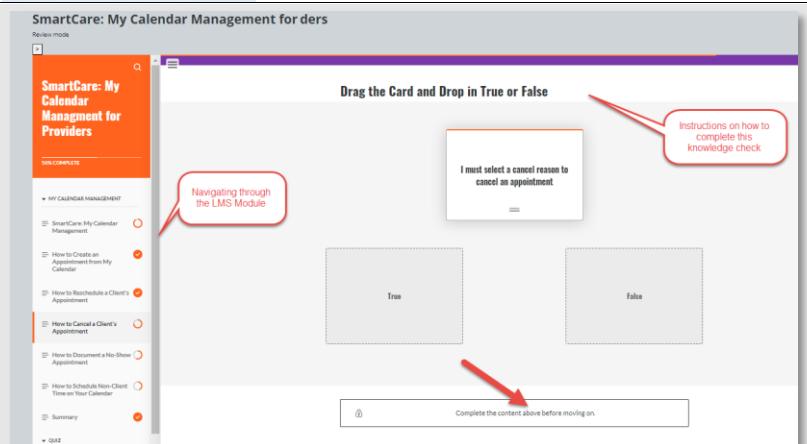
7. At the end of most modules, you will need to complete a Quiz.
Please note:

   a. The quizzes are generally short (less than 10 questions each)

   b. The system will tell you immediately if you answered the question correctly or not.

   c. 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**.

   d. You can retake the quiz as many times as you need in order to pass.

   e. The questions and answers are scrambled each time you retake a quiz.
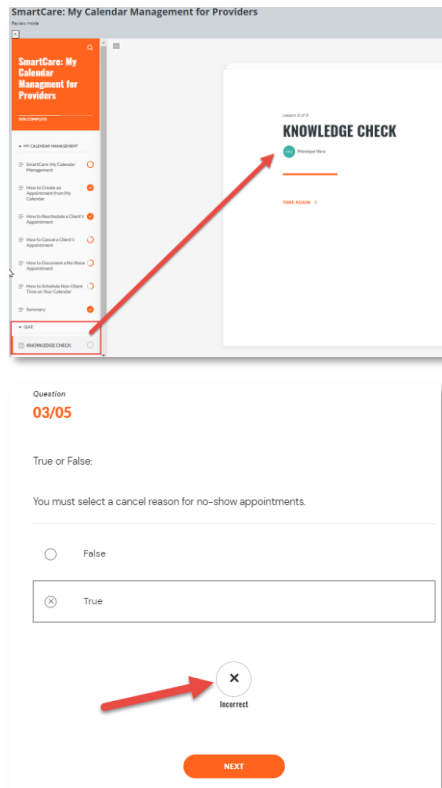
8. 💡 **Pro Tip:** Many of the True/False questions are not built as radio buttons but as "fill in the blanks."

   For these, be sure to key in "true" or "false" only. Answers such as "yes" or "correct" may be marked as "incorrect."
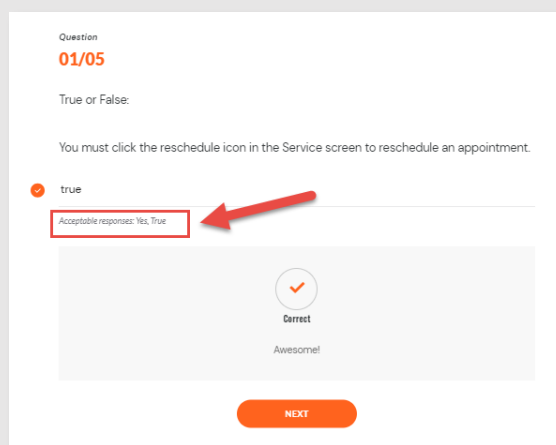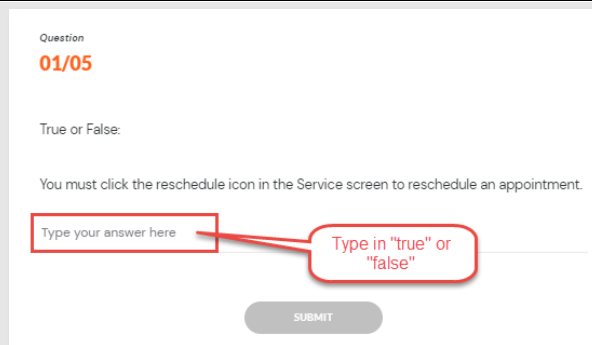
Creating a "Fake Client" for Training Purposes

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.	
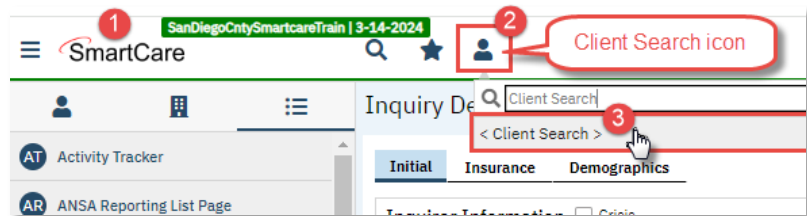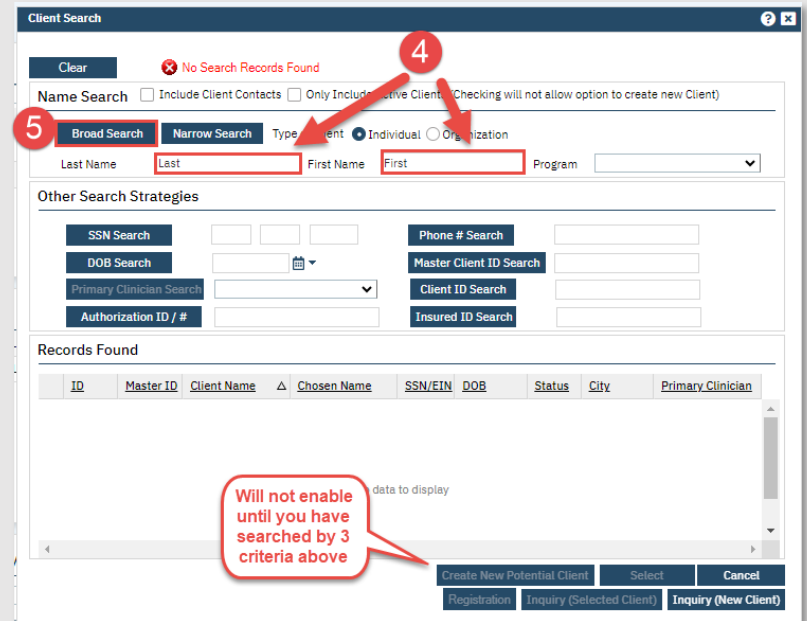
6. If there are no matches based on name, search by two more selections: 7. Enter the **SSN** and then select the **SSN Search** button 8. Enter the **DOB** and then select the **DOB Search** button 9. If the client is not already in the system, click on **Create New Potential Client** on the bottom right.	
10. Select **Yes** at the **Confirmation Message** window.	
This is where the system will generate a **Client ID**. Write it down so you can search by it while training.	

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.

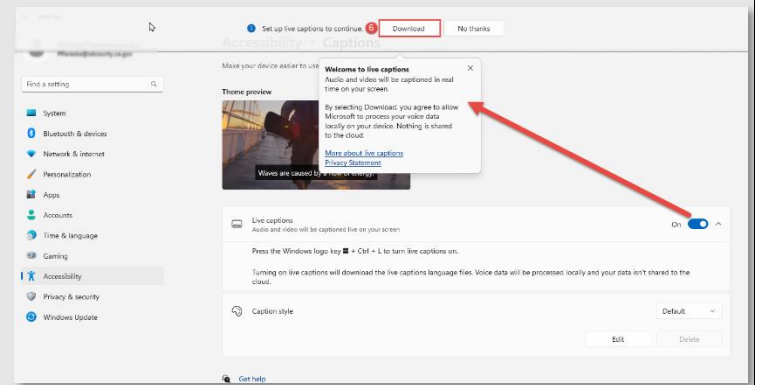| Step	Image
1. In the search window of your device, enter the search term "settings." 2. Click to open the **Settings** application.	
3. From **Settings**, select the **Accessibility** link. 4. Select the caret **>** to open **Captions**.	

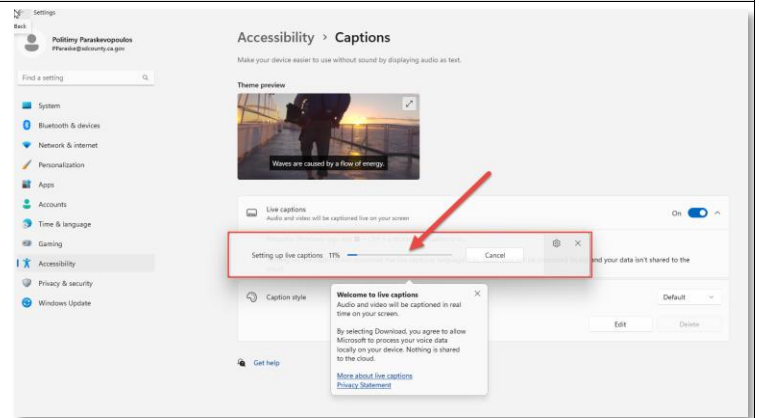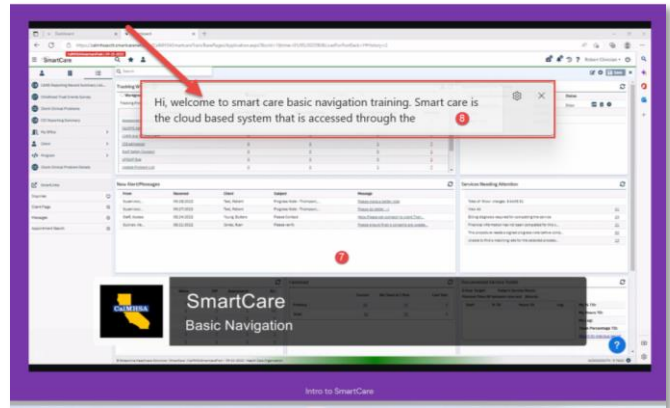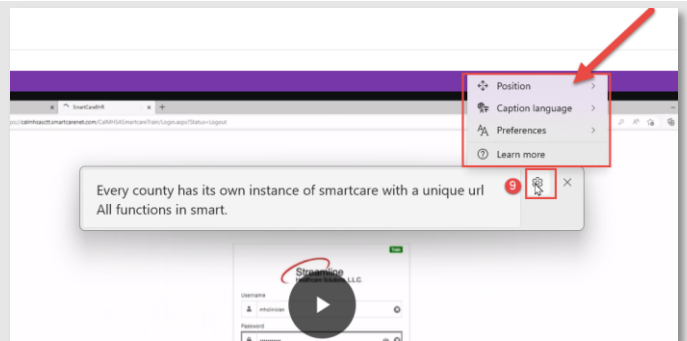|	
This will open the **Captions** window. The **Live Captions** setting will be set to **Off** by default. 5. Select the toggle button to move it from Off to **On**	
If this is the first time you are enabling the **Live Captions** option, you will be prompted to download the software. This should *not* 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**.	
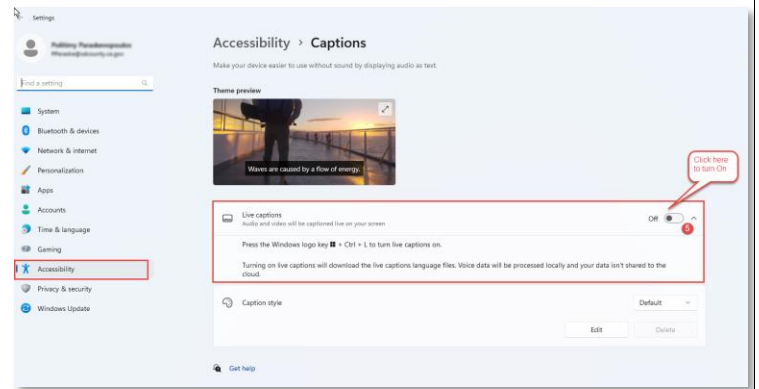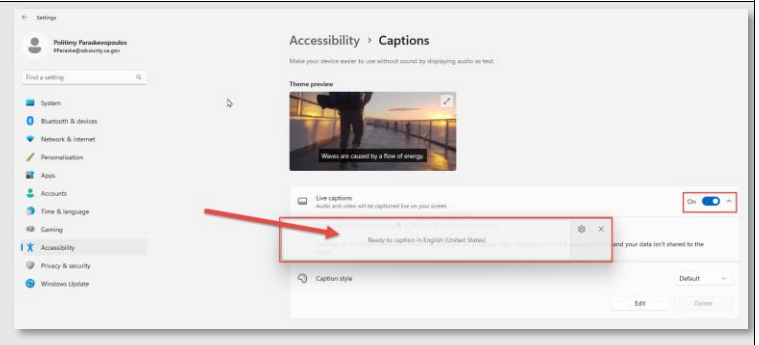
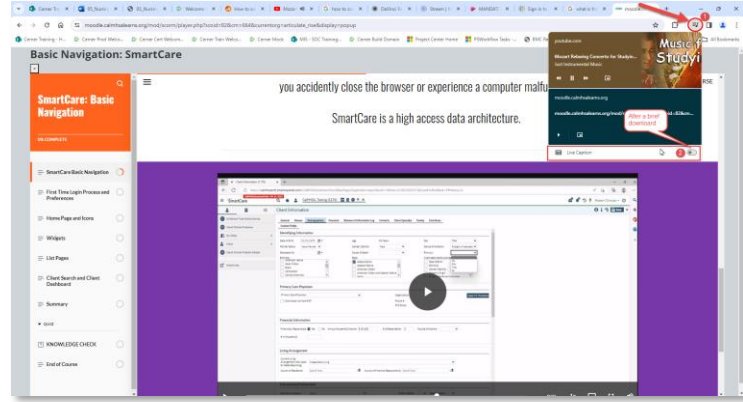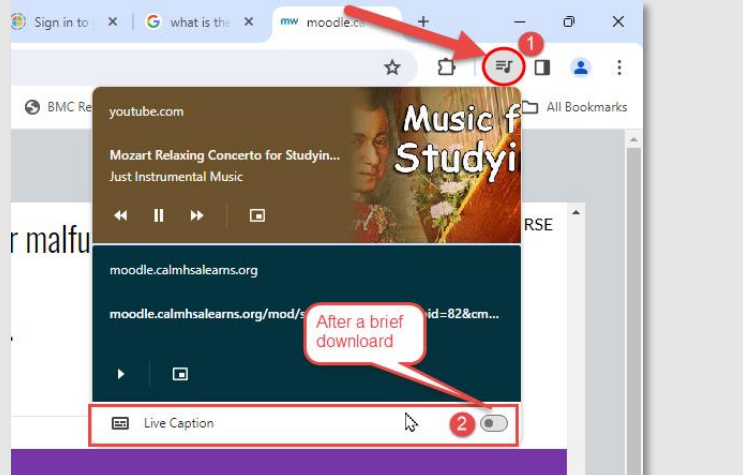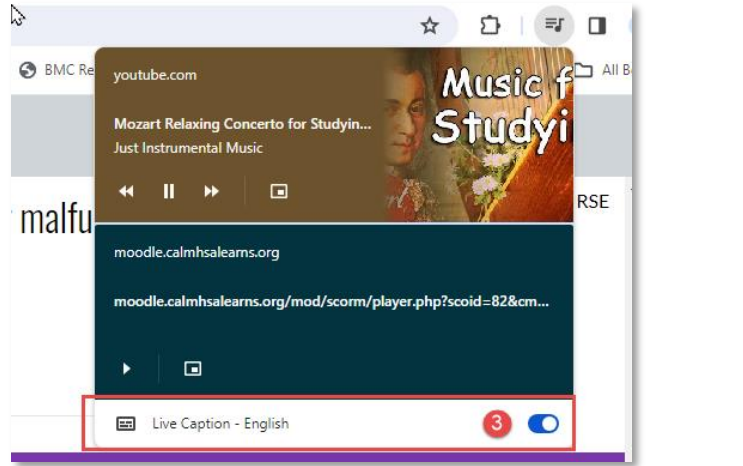|	
7. Launch any video that has audio. 8. As the audio plays, you will see the captioning appear in real time in your caption bar.	
You can move the bar anywhere on your screen. 9. The settings on the toolbar offer other preferences so you can customize to your liking.	

Using Chrome Browser Music Controls to Enable Closed Captions

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

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**.