

CalMHSA Staff Roles—Additional Information

Role	Type	Description	Types of Users
CalMHSA SysAdmin	Base	Full Access to everything	CalMHSA SysAdmin, to be used by CalMHSA staff only
County Affiliate SysAdmin	Base	Full Access to everything, except specific primary-driven configurations	SysAdmin, people who do back-end system set-up, IT/IS
Billing	Base	Billing processes	people who process invoices, run billing processes, handle adjudication, etc.
Billing Supervisor	Add-on	Adds supervisory pieces (able to see other staff's information)	supervisors of billing staff
LPHA/Clinician	Base	Clinical documents (service notes, clinical assessments,	LPHAs (LCSW/ASW, LMFT/AMFT, LPCC/APCC, RN, LVN, Psychiatrist, MD/DO, Psychologists)
Clinician Supervisor	Add-on	Adds supervisory pieces (able to see other staff's information)	supervisors of clinical staff
Health Maintenance Alert	Add-on	Allows a person to approve Health Maintenance Alerts	People who can approve or dismiss any Health Maintenance Alerts; clinical decision makers (e.g. people who can diagnosis)
Non-LPHA	Base	Clinical documents, but can only view diagnosis (can't edit)	non-LPHAs (MHRS, Peer Support Specialist, Case Manager, Mental Health Worker, Other Qualified Provider) or staff who cannot lead treatment, such as RN, LVN, etc.
LVN	Add-On	Minimal medical documents such as vitals and psych note	Medical staff who can do minimal medical documents, such as LVN, Med Asst
Medical/RN	Add-On	Medical documents such as vitals, Rx, psych note, service notes)	Clinical staff who work in the medical field and can do most medical documents (RN, Psychiatrist, MD/DO, PA, NP)

Prescriber	Add-on	Allows a person to sign prescriptions	ONLY staff who can prescribe medications (MD/DO, PA, NP)
Medical Supervisor	Add-on	Adds supervisory pieces (able to see other staff's information)	supervisors of medical staff
Inpatient/Residential	Add-on	Includes inpatient and residential module; includes things like eMAR, bed assignment, etc.)	People who work in an inpatient or residential setting
Medical Records/Quality Assurance	Base	Ability to see other staff's information, additional screens (e.g. grievance/appeal, authorization approval)	people who need <i>view</i> access to the entire record but will not be expected to provide services themselves (won't need <i>write/edit</i> access); will also have access to things like grievances & appeals and authorization approval tasks
Reception/Front Desk	Base	Front desk views, the ability to see other staff's information to print information and reports for them	people who schedule appts for other users, check in clients at the front desk, etc.

All roles include basic dashboards, client search, and staff calendar.

Each user should have 1 base role. Most users will only have 1 base role. For any who you think need more than 1, talk to CalMHSA first. Add-on roles are in addition to a base role. You should not have anyone with ONLY an add-on role without having a base role.

For student interns, use their appropriate base role but you'll want to set up co-signature rules. This is done in staff set-up. We will be reviewing the documents that require a co-signature *if* the staff set-up also indicates a required co-signature. This is done at the document level, NOT at the staff/user level. We're expecting that the documents that will require a co-signature will be assessments and diagnosis type documents. We are not currently decided on all documents, such as progress notes.