SONOMA COUNTY SMARTCARE

End User Training

AGENDA

- Introductions
- Role of Superusers
- Training Plan
- Logging into Moodle
- Logging into SmartCare
- Complete Moodle Courses
- Return to Teams Meeting at 15:00 for Q&A and Teachbacks

NOTE: If you did not receive an email from the Resource Management Unit (RMU) with your SmartCare Train login information, you are not set up in the system and will not be able to practice what you are learning in the training until you have that login information.



INTRODUCTIONS

* Please put your name (w/ honorific or how you'd like to be addressed), title, and program/agency in the chat

ROLE OF SUPERUSERS

- Monitor Teams chat
- Offer one-on-one assistance to end users
- Help with troubleshooting issues now and after go-live

TRAINING PLAN

During today's training you will be using two systems from your web browser

- One is the training site (Moodle)
- One is the EHR (SmartCare) for you to practice alongside the training videos

Moodle Courses

- Set up in bundles of modules per disciplines
- Take modules according to your role/job duties
- Inpatient/Residential course is offered on-demand from Sonoma County SysAdmin

Q&A and Teachbacks start at 15:00!

Training Module	Clerical Front Desk	Clinical Direct Service	Prescribers, RN, & Medical	CSU Residential	Billing (County)	Billing (CBO)	QA (County & CBO)
SmartCare Basics: A Message from our Executive Director Basic Navigation Privacy and Security in SmartCare	M		V	M	A	V	V
SmartCare Calendar Management for Providers	X	\checkmark	\checkmark	×	\checkmark	×	\checkmark
SmartCare for Front Desk Staff		X	×	X	\checkmark	×	\checkmark
SmartCare for Prescribers, Nurses, & Med Support Staff	×	×	V	×		×	
SmartCare Clinical Workflow for Clinicians (Life Cycle of a Client) Life Cycle of a Client: Request for Services, Screening, and Intake & Assessment Life Cycle of a Client: Services Life Cycle of a Client: Discharge Clinical Workflow Training	XXX		x √ (non-MD) x x	XXXX	ববে	XXXX	N N N N
Group Set-up and Documentation	×	\mathbf{N}	×	×		×	
Billing	X	×	×	×			
TBD Inpatient/CSU/Residential (ETA 6/15)	×	×	×		×	×	\checkmark

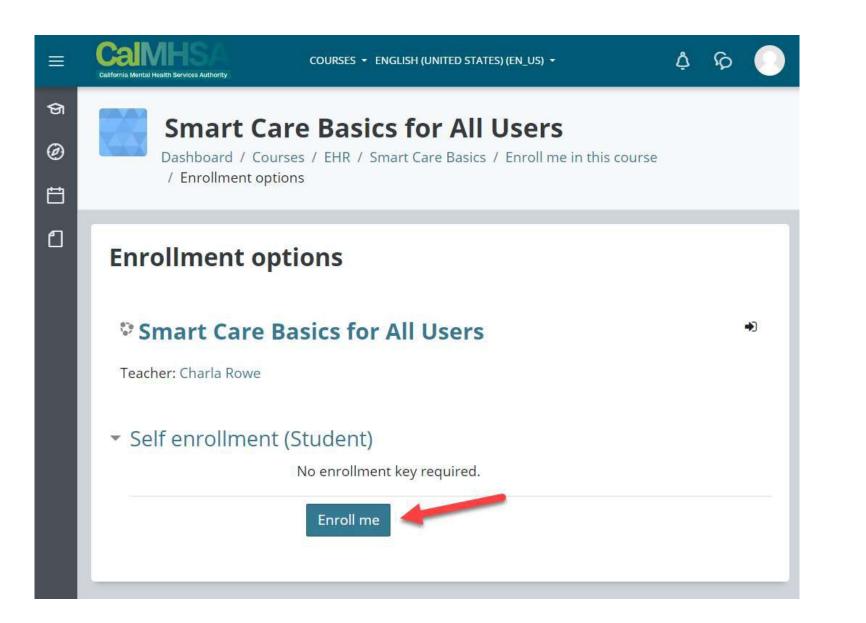
MOODLES ACCORDING TO ROLE

LOGGING INTO MOODLE

- Moodle courses: https://moodle.calmhsalearns.org/
- When you go to the CalMHSA Moodle page, your dashboard will be blank, even if you have previously completed courses. There are two ways to enroll to the appropriate courses.
 - 1. Select "Courses" at the top left of your screen and then select "All Courses" and then "EHR"
 - 2. Or, Select the "Enroll into SmartCare EHR Training" button in the upper right that has a white background (it is under the two green buttons).
- Select the applicable course(s) to enroll in, and then select "Enroll me" to enroll in the course. Repeat for other courses that you need to take.

≡	California Mental Health Services Authority	1		5) (EN_US) 🔻												ł	Ş	Q	
0			All courses Course search							(Customize this page		Course	es					
8 1	Learning		FAQ										Ĵ	Enro	oll into	5150	Cours	e	
		Q Sea	arch						Last access	ed 🕶	🗰 Expanded 🕶	2	Enro			CalAIM tCare E			7
					Nothi	ing to dis	splay						LIIIC	ni into	JITIGI			annie	
													Calend	lar	lune	e 2023			*
													<mark>Sun</mark>	Mon	Tue	Wed	Thu 1	2 3	3
													4 11 18	5 12 19	6 13 20	7 14 21	15	9 1(16 1 23 24	7
													25	26	27	28	29	30	

California Mental Health Services Authority	COURSES + ENGLISH (UNITED STATES) (EN_US) +	¢ ଚ 🌰
EHR Dashboard / Courses /	/ EHR	
	Course categories: EHR +	र्ट्ट्रे -
SmartCare EHR Training	3	
Search courses		
Teacher: Charla Rowe	Basics for All Users	
SmartCare	Calendar Management for Providers	
SmartCare	for Front Desk Staff	
SmartCare	Clinical Workflow for Clinicians (Life Cycle of a Client)	
SmartCare	for Group Service Providers	
SmartCare	for Billing Staff	
SmartCare	for Prescribers, Nurses, & Med Support Staff	



LOGGING INTO SMARTCARE

- <u>https://calmhsasonomasctt.smartcarenet.com/SonomaCntySmartcareTrain/</u>
- Username is first initial last name: tcarr (all lowercase, system is case sensitive)
- Password for everyone first time: P@ssword123456
- New password has to be 14 characters long! It's crazy long!!
 - Has to have special character(s)
 - Has to have upper case
 - Has to lower case
 - Has to have number(s)



SmartCare	Q ★ ≗ Mouse, Mickey (1064690) ? + ×		🖆 🗳 🍞 ? Trista Carr ³ 🔱
≗ <u>⊞</u> ≔	My Preferences		i 🐣 🖬 Save 🗙
AT Activity Tracker	General Check In Notification Preferences		2
AR ANSA Reporting List Page	Account	Security Questions	
AR ASAM Reporting List Page		Security Question 1 In what city were you born?	
CR CalOMS Report Summary	User Name tcarr Password	Answer	
CR CANS Reporting Record Sum	Confirm Password	Security Question 2 In what state did you get your first driver's license?	
CD CDAG Details		Answer	
CA Client Activity Tracker	Contact	Security Question 3 What is your father's middle name?	
CD Clinical Data Access Groups	Phone (707) 565-5005	Allower	
Compliance MH Batch List Pa	E-mail Id Trista.Carr@sonoma-county.or	Convert Cathington	
CS Compliance SUD Batch List P		General Settings	
CR CSI Reporting Summary	Image Server	Home Page Dashboard V	
FR FSP Report Summary	Image Server SonomaCntySmartcareTrain_ImageServer V	Client Page Preference Client Dashboard Provider Page Preference V	
GA GL Accounts	Location	Default Program View Vew Program View	D3−
MD MAT Dispenser		Diagnosis Search V Preference	
MI Medication Inventory Transa	Preferred Prescribing Location	Current Clinical Data Access Administration	
M Medication/Lot/Bottle		droop	9
ME MMEF Eligibility Records	Preferences	Staff Signature	
ME MMEF Eligibility Records Detail	Display primary clients only in "Open This Client" Dropdown Last Visit		
The Englority Records Detail		Upload Signature Image Upload Signature Electronic	?

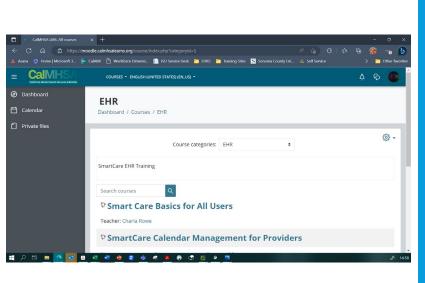
Once logged into SmartCare, verify your preferences

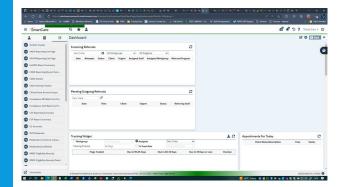
- Choose "Dashboard" as your Home screen under the General Settings
- Click on the Save button in the upper right corner of the screen

Then log out of SmartCare and log back in and your settings will be set

PROCESS (CONT'D)

- You will have open two websites
 - CalMHSA Moodle
 - SmartCare
- Move one browser tab to your second monitor if you have an additional monitor
 - Click and drag the tab to the other screen
- Complete the trainings and follow along in SmartCare





FAKE CLIENTS

Mickey Mouse is in the Adult Medication Support Program	Steamboat Willy is not enrolled in a program	Minnie Mouse referred to Access Team (in requested status)	Donald Duck & Daisy Duck are enrolled in REAP & DAAC Outpatient Drug Free	Super Man has Clark Kent Alias and is not enrolled in any programs	Kara Danvers A.K.A Super Girl is enrolled in Mental Health Youth & Family SCBH		
Lex Luther is enrolled in Integrated Recovery Team	Lois Lane is not enrolled in any programs	Bat Man is enrolled in Buckelew FACT	Robin Boy Wonder is enrolled in CSN Bridges	Wonder Woman (Diana Prince) is enrolled in Lifeworks TBS	Bat Woman is enrolled in SAY FASST		
Aqua Man is enrolled in Seneca Outpatient Services	The Flash is enrolled in SRTP Methadone Maintenance	Poison Ivy is enrolled in Women's Recovery Services	Bruce Wayne is enrolled in TLC MH Services	The Joker is enrolled in Buckelew TAY SCIL	The Penguin is enrolled in Progress Crisis Residential Unit		



LOGIN TROUBLESHOOTING



THANK YOU!

Trista L. Carr, PsyD Sonoma County Behavior Health Clinical Informatics Analyst trista.carr@sonoma-county.org