

PREPARING NEW
USERS FOR THE EHR

SMARTCARE END-USER TRAINING PLAN



INTRODUCTIONS



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- SmartCare SysAdmin



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- Adult Services Section Manager
- Sonoma SmartCare Implementation Project Lead

PRESENTATION OVERVIEW

Overall Training Plan

End-Users by Role

Training Content

Training Logistics



WHAT'S THE NEED?

- Credential new users
- Ensure proper training of new users
 - EHR training
 - CalAIM training
 - Documentation training
 - Billing/Invoicing training
 - QA/Reporting training
- Provision new user access



WHAT'S THE PLAN?

- System Access Request Process
- Credentialing Verification Process
- Training Modules
 - CalAIM
 - SmartCare
- Role-specific Training
 - Documentation, Billing, Reporting, Inpatient/Residential
- Provisioning in PROD
- Connecting to Support Resources



USER ROLES

Clerical/Front
Desk

Clinical/Direct
Services

RN/Medical

CSU/Residential

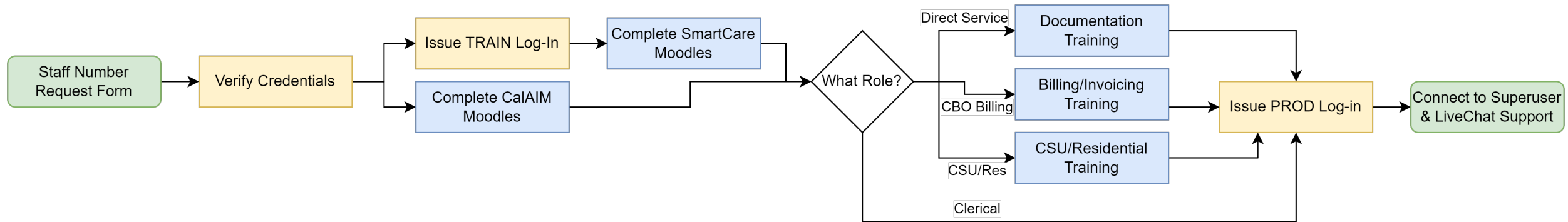
Billing (County)

Billing (CBO)

QA (County &
CBO)

SMARTCARE TRAINING MODULES

Training Module	Clerical Front Desk	Clinical Direct Service	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	☑	☑	☑	☑	☑	☑	☑
My Calendar Management for Providers	☒	☑	☑	☒	☑	☒	☑
Front Desk Scheduling	☑	☒	☒	☒	☑	☒	☑
Prescription Support Services	☒	☒	☑	☒	☑	☒	☑
Life Cycle of a Client: Request for Services, Screening, and Intake & Assessment	☑	☑	☒	☒	☑	☒	☑
Life Cycle of a Client: Services	☒	☑	☑	☒	☑	☒	☑
Group Set-up and Documentation	☒	☑	☒	☒	☑	☒	☑
Life Cycle of a Client: Discharge	☒	☑	☒	☒	☑	☒	☑
Inpatient/CSU/Residential (County Created)	☒	☒	☒	☑	☒	☒	☑
Billing (CalMHSA and County Created)	☒	☒	☒	☒	☑	☑	☑



LOGISTICAL FLOWCHART

STAFF NUMBER REQUEST FORM

Includes 274 Required
Elements

Includes Credentialing
Information

Determines Role and
Access



TRAINING LOGISTICS

Training Coordinator Support

- Troubleshoot issues with TRAIN log-in
- Troubleshoot issues with Moodle log-in
- Track completion



FINAL LOGISTICS



PROD Log-In

Troubleshoot Log-in issues

Troubleshoot user set-up issues



After Care

Introduce to Live Chat function

Introduce to AI and Walk-Me

Introduce to Superusers

QUESTIONS

