

DBH and CalMHSA SmartCare and Payment Reform Training Activities

EHR/FFS	Training Name	Training Description	Target Audience	Venue	Recording Link	Training Date	Comments
DBH Trainings							
FFS	New Service Coding and Documentation	• Ensure providers understand CPT codes, have resources such as manuals - ensure to review the individual and group provider needs as well as org	MH & SUD Admin and Treatment Service Providers (DBH, Orgs, Groups, and Individual Providers)	Microsoft Teams	https://www.youtube.com/watch?v=Rku8Fhs6w	04-May-23	1:00 - 2:00PM
FFS	Fresno County DBH Introduction to Procedural Codes	Fresno County DBH Introduction to Procedural Codes	MH & SUD Admin and Treatment Service Providers (DBH, Orgs, Groups, and Individual Providers)	Microsoft Teams	https://youtu.be/j4gys7ovly	11-May-23	1:00 - 2:30PM
CalMHSA							
Zoom Live Trainings							
		Full Access EHR Organizations and DBH - recordings are available to subject matter experts (SMEs), Super Users, and Champions. Contact DBHStaffDevelopment@fresnocountyca.gov to request the available links.					
Moodle							
EHR	Basic Navigation (30 min)	a. This is an introductory course that covers the following topics: i. How to login for the First Time ii. What is the Home Page and What are the Functions of the Icons iii. What is a Screen vs. What is a document iv. What are Widgets • Tracking Widget • Appointments for the Day Widget • New Message/Alerts Widget v. List Pages vi. How to Search for a Client vii. What is the Client Dashboard viii. How to Search for Client Documents	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	Privacy and Security in SmartCare (35 min)	a. This course covers how privacy and security is handled in SmartCare i. What is CDAG (Clinical Data Access Group) ii. What is the Coordinated Care Consent iii. What is the Release of Information iv. What Other Consents are in SmartCare	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	My Calendar Management For Providers (25 min)	a. This course will walk you through how to manage your own appointments and calendar i. How to Create an Appointment from My Calendar ii. How to Reschedule a Client's Appointment iii. How to Cancel a Client's Appointment iv. How to Document a No-Show Appointment v. How to Schedule Non-Client Time on Your Calendar	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	Front Desk Scheduling (25 min)	a. This course will walk you through how to manage appointments and check-in clients i. How to Navigate the Staff Calendar ii. How to Use the Appointment Search Screen iii. How to Use the Reception/Front Office Screen iv. How to Manage Appointments	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	Prescription Support Services (60 min)	a. This course will walk you through the process of prescribing and managing medications. I. How to get to the Rx Module and General Overview • The Rx Module Start Page II. What is the Patient Summary Screen III. How to Document Allergies, Intolerances, and Failed Trials IV. How to Add a Preferred Pharmacy V. How to Create a New Prescription Order VI. How to Manage the Medication List VII. How to Add Medications Prescribed Elsewhere VIII. How to Document Patient Consent IX. How to Change, Re-Order to Stop a Medication b. The section of the course will walk you through the medical workflows in SmartCare i. How to Document the History and Physical Exam ii. How to Document the Prescriber's Note iii. How to Document the Vitals (Flow Sheets) IV. How to View and Order Labs V. How to be a Proxy for a Prescriber	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	Life Cycle of a Client: Requests for Services, Screening, and Intake & Assessment (30 min)	a. This course will walk you through the first 3 stages in the life cycle of a client i. How to Document Requests for Services • The Inquiry Screen ii. How to Document the Screening Process • How to Document External Referrals iii. How to Document the Intake and Assessment • How to Add a Client to a Program • How to Add or Request Enrollment to a Program iv. Diagnosis Entry • How to Add a Diagnosis • How to Edit a Diagnosis • How to Favorite a Diagnosis v. Exceptions to the Process	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	Life Cycle of a Client: Services (30 min)	a. This course will walk you through the 4th stage of the life cycle of a client and where the client spends the most time, in services. i. How to Document a Progress Note for a Scheduled Service ii. How to Document a Progress Note for an Unscheduled Service iii. How to Amend a Progress Note iv. How to Enroll a Client into a Program v. How to View and Edit a Client's Treatment Team b. This second section of this course you will learn about group documentation. i. How to Document a Group Note • How to Document Individual Notes ii. How to Document Group Attendance iii. How to Add or Remove Staff Members iv. How to Add or Remove Clients	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
EHR	Life Cycle of a Client: Discharge (10 min)	a. This course will walk you through the 5th stage of the life cycle of a client, the process to discharge a client. i. How to Generate the Discharge Document ii. How to Generate the Summary of Care Document iii. How to Close the Client to a Program	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	Moodle (see Comments)	Self-Paced Online	N/A	Link to SmartCare Learning Management System: https://moodle.calmhsalearns.org/login/index.php (Use enrollment code 03127)
CalMHSA Website							
EHR	Front Desk/Administrative Documentation - Basic Navigation Videos (12 min 45 sec)	• Introduction to the Home Page and Icons • Introduction to Widgets • How to Use the Tracking Widgets • How to Use Appointments for Today Widget • How to Use the Messages Widget • How to Use List Pages - Introduction to List Pages, Filtering, Using Links, Widgets • How to Search for client Using the Client Search Icon • Introduction to the Client Dashboard • How to Use the Client Search Screen (Narrow Search) and Client Flags	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Front Desk/Administrative Documentation - Front Desk Scheduling Videos (12 min 54 sec)	• How to Use the Reception/Front Desk View Screen • How to Navigate the Staff Calendar Screen • How to Cancel and Appointment from the Reception Front Desk Screen • How to Use the Appointment Search • How to Schedule a Follow-Up Appointment • How to Reschedule and Appointment • How to Document a No-Show Appointment	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Front Desk/Administrative Documentation - Life Cycle of a Client: Intake and Assessment Videos (10 min 48 sec)	• How Do I check in a Client for their Intake or Assessment Appointment • What do I do when a Client Walk in for an Assessment at a Walk-In Clinic (New Clients and Existing Clients)	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	

EHR	System Administration Documentation - Basic Navigation Videos (13 min 45 sec)	<ul style="list-style-type: none"> Introduction to the Home Page and Icons Introduction to Widgets How to Use the Tracking Widgets How to Use the Appointments for Today Widget How to Use the Messages Widget How to Use List Pages - Introduction to List Pages, Filtering, Using Links, and Widgets How to Search for a Client Using the Client Search icon Introduction to the Client Dashboard How to Use the Client Search Screen (Narrow Search) and Client Flags 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Prescriber Documentation - Prescriber Video Guides (58 min 3 sec)	<ul style="list-style-type: none"> How to Navigate to the Rx Module Introduction to the Patient Summary Screen How to Update the Allergies List How to Add Preferred Pharmacies How to Create Prescription New Order Introduction to the Patient Medication List How to Add a Medications Prescribed Elsewhere How to Document Patient Consent How to Change or Re-Order a Medication How to Discontinue a Medication How to document a History and Physical Exam How to Document Vitals (Flow Sheet) How to Document the Prescribers Note How to Order Labs How to View Detailed Lab Results How to Sign Your E&M Note 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Basic Navigation Videos (19 min 35 sec)	<ul style="list-style-type: none"> Introduction to the Home Page and Icons Introduction to Widgets How to Use the Tracking Widgets How to Use the Appointments for Today Widget How to Use the Messages Widget How to Use List Pages - Introduction to List Pages, Filtering, Using Links, and Widgets How to Search for a Client Using the Client Search icon Introduction to the Client Dashboard How to User the Client Search Screen (Narrow Search) & Client Flags 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - My Calendar Management (6 min 56 sec)	<ul style="list-style-type: none"> How to Schedule an Appt from My Calendar How to Cancel an Appt How to Document a No-Show Appt How to Reschedule an Appt How to Schedule Non-Client Time 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Life Cycle of a Client: Request for Services (10 min 41 sec)	<ul style="list-style-type: none"> How to Document the Requests for Services (Inquiry) 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Life Cycle of a Client: Screening (10 min 10 sec)	<ul style="list-style-type: none"> How to Document the Screening Process 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Life Cycle of a Client: Intake and Assessment (11 min 33 sec)	<ul style="list-style-type: none"> How to Document the Intake and Assessment What do I do When a Client Arrives for their Intake or Assessment and I do not Have a Front Office Staff What do to When a New Client Walks in for an Intake or Assessment 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Diagnosis Entry (7 min 16 sec)	<ul style="list-style-type: none"> How to Manage Diagnosis Entry 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Life Cycle of a Client: Services (39 min 21 sec)	<ul style="list-style-type: none"> How to Create a Progress Note for a Schedule Service How to Create a Progress Note for an Unscheduled Service How to Amend a Service Note How to View or Edit Treatment Team Members How to Add a Client to a Program How to Document a Group Note 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Life Cycle of a Client: Discharge (4 min 19 sec)	<ul style="list-style-type: none"> How to Close a Client to a Program How to Generate the Summary of Care Document How to Generate the Discharge Summary Document 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Clinical Documentation - Guides, Flow Chart, Cheat Sheet	<ul style="list-style-type: none"> Clinical Documentation Guide Workflow Flow Chart SmartCare Cheat Sheet SmartCare Prescription Support Services User Guide EHR LMS Course Offerings 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	
EHR	Billing Documentation (15 min 50 sec)	<ul style="list-style-type: none"> Introduction to the Home Page and Icons Introduction to Widgets How to Use the Tracking Widgets How to Use the Appointments for Today Widget How to Use the Message Widgets How to Use the List Pages - Introduction to List Pages How to Use List Pages - Filtering How to Use List Pages - Using Links How to Use List Pages - Widgets How to Search for a Client Using the Client Search icon Introduction to the Client Dashboard How to User the Client Search Screen (Narrow Search) & Client Flags 	For now: SMEs, superusers, and champions Effective June 6, 2023- available to end users	CalMHSA Website https://2023.calmhsa.org/	Self-Paced Online	N/A	