

CERNER COMMUNITY BEHAVIORAL HEALTH (CCBH) USER TRAINING REGISTRATION GUIDE

V. 12/2021



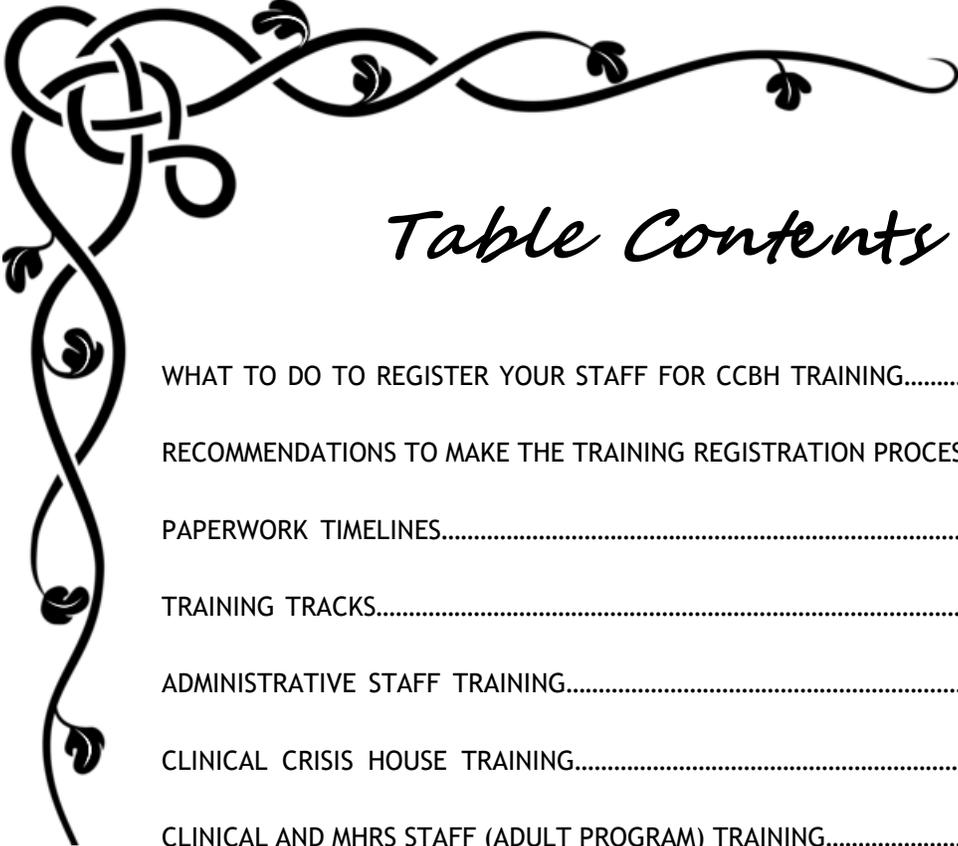


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Questions about registration?

E-mail us at: sdu_sdtraining@optum.com

**Or call Optum at:
800-834-3792
(Option #3)**

ARE YOU WONDERING WHAT TO DO TO REGISTER YOUR STAFF FOR CCBH TRAINING?



We have prepared this guidebook to assist you in understanding what steps to take to register your staff for CCBH training.

Step 1: Use this guide to find the training that your staff need to attend

Step 2: Go to the www.regpack.com/reg/optum website and follow the registration prompts.

- After you complete the process, you will receive an email confirmation for the class.

Step 3: Follow the paperwork requirement and timelines

Note: Access Request Form (ARF) Paperwork must be submitted and cleared to MH MIS **NO LATER** than 7 calendar days prior to the scheduled class. If paperwork is not submitted, even when you have received a confirmation for your training, you will not be guaranteed a virtual seat and may be asked to reschedule the training.

What paperwork needs to be submitted to MH MIS and where can I find them?

- Click [HERE](#) and download the ARF Tip Sheet and forms

How do you submit the forms to MH MIS?

- Email forms to all three following email addresses:
- BHS-Accountrequest.HHSA@sdcounty.ca.gov, BHSCredentialing@optum.com and MISHelpdesk.HHSA@sdcounty.ca.gov

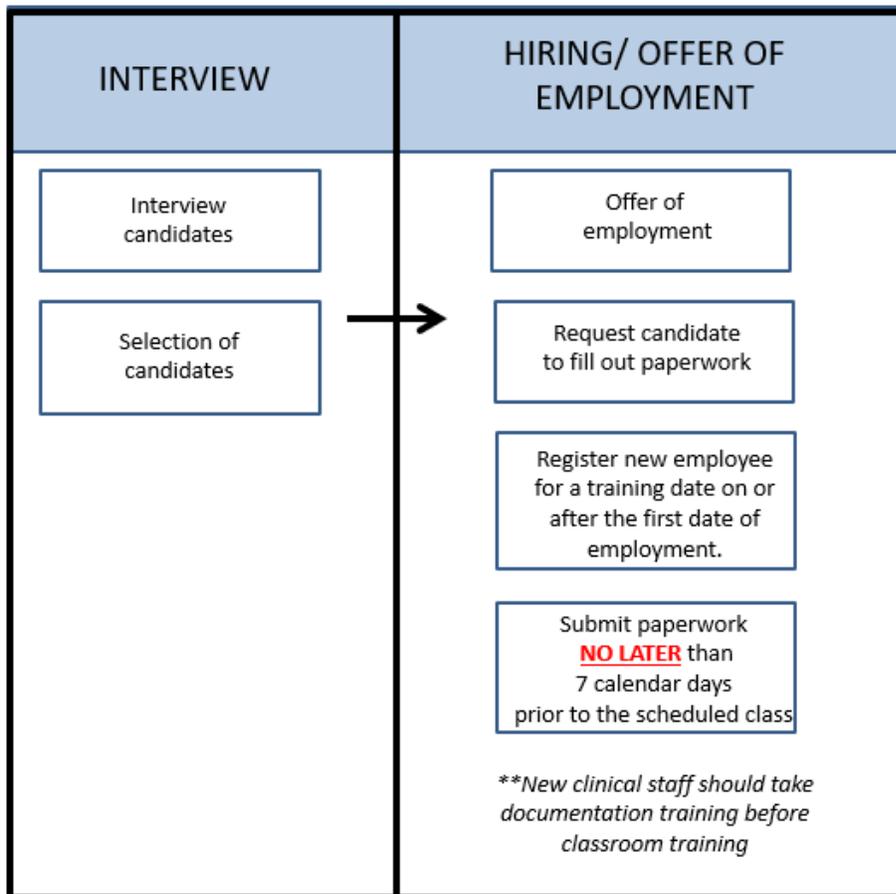
Questions about registration?
E-mail us at: sdu_sdtraining@optum.com

RECOMMENDATIONS TO MAKE THE TRAINING REGISTRATION PROCESS EASIER

We recommend that you plan the training of your staff well before their first day of employment. Programs that are successful use the flow below to ensure that their staff are trained as soon as possible.

We encourage you to take a look at this process and follow the instructions in this guide.

**In an effort to assist new or returning staff to more successful understanding of the link between clinical assessments and client plans, QM has developed documentation trainings for both the Children and the Adult System of Care. It is best to have newly hired staff attend a full Documentation Training prior to their CCBH training if at all possible. This will allow newly hired staff to focus on learning the functionality of CCBH during the training on the software (which is the sole intent on CCBH training – not to be seen as a replacement for training in Documentation Standards). If you are unable to participate in documentation training, your Program Manager may be able to assist with guiding you on documentation standards.



Did you know?

The County of San Diego has trained more than 24,572 attendees in 4,181 classes in CCBH since February 2010 with an average overall satisfaction score of 95%?

Tip: To avoid delays, check the accuracy of your paperwork before you send it to MH MIS.



PAPERWORK TIMELINES

Each CCBH training requires different paperwork to be submitted. Read the guide below to know what paperwork you need to submit and the timelines to follow.

Administrative Professionals	Clinical & MHRS (Adult Program Staff)	Paraprofessional Staff	Prescriber and Nursing Staff
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Due 7 calendar days before training	ADMIN DATA ENTRY <ul style="list-style-type: none"> ARF SOP ESA 	ASSESSMENTS <ul style="list-style-type: none"> ARF SOP ESA 	VIEW ONLY <ul style="list-style-type: none"> ARF SOP ESA 	ASSESSMENTS <ul style="list-style-type: none"> ARF SOP ESA
	CP/PN <ul style="list-style-type: none"> ARF SOP ESA 	PN <ul style="list-style-type: none"> ARF SOP ESA 	PN <ul style="list-style-type: none"> ARF SOP ESA 	DHP <ul style="list-style-type: none"> DHP ARF

Definitions:
 ARF: Account Request Form
 SOP: Summary of Policies
 ESA: Electronic Signature Agreement

Example:



Joe needs Assessments training.

Q: Joe wants to attend Assessments training on the 15th. What date **MUST** his paperwork be turned in by to avoid being excluded?

A: Joe's paperwork **MUST** be submitted by the 16th. If no paperwork is submitted by the 16th, he will be excluded and asked to reschedule his training.

SUN	MON	TUES	WED	THUR	FRI	SAT
	1	2	3	4	5	6
7	8	9				
		Last day paperwork can be submitted to attend training on the 16th				
14	15	16	17	18	19	20
		Training Date				
21	22	23	24	25	26	27
28	29	30	31			

To register for training, go to the www.regpack.com/reg/optum website, and follow the directions on page 3 in this registration guide.

TRAINING TRACKS

In this guide, you will find all of the information necessary to make decisions about CCBH training. Below is the grid that explains the **typical order** in which people attend training. Please read the guide as your program may have special situations that may be addressed by the County MH MIS Help Desk.

Administrative Professional Track Page 7	Admin  Data Entry	Service Entry	Scheduler
Clinician Track Page 8-9	Assessments 	Client Plan & Progress Notes OR Progress Notes	
Paraprofessional Track Page 10	View Only Access 	Progress Notes	
Prescriber Track Pages 11 and 13	Assessments 	Progress Notes	Doctor's Homepage
Nursing Track Pages 12-13	Assessments  OR View Only Access**	Progress Notes	Doctor's Homepage*

**Staff needing View Only Access will only be eligible to take Progress Notes, not Client Plans & Progress Notes.

*Nursing staff only need to take DHP if they will be staging medications for doctors.



Note: Classes with stars are required prerequisites to attend the rest of the classes on the track. For View Only Access, there is no training class to take. Staff receive access automatically. Once forms are processed by MH MIS, MH MIS sends an email to the staff that includes login information, a resource packet, and a link to a video tutorial.

Not sure what kind of training to take?

*Talk to your Program Manager
 or e-mail the County MH MIS
 Help Desk at:*

MISHelpDesk.HHSA@sdcounty.ca.gov



ADMINISTRATIVE STAFF TRAINING

* ADMIN TRAINING *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.

PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule.**

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
ADMIN DATA ENTRY	Learn to add new clients and open/close assignments	None	Staff whose job duties include searching for and/or adding new clients, and opening/closing assignments to the Unit/SubUnit
<i>Note: It's OK to sign up for all the training on this track at the same time on the website!</i>			
SERVICE ENTRY	Learn to enter individual and group services into CCBH	Completed and passed Admin Data Entry Training	Staff whose job duties include entering services into CCBH
SCHEDULER	Learn to set up and manage all aspects of the Scheduler product in CCBH (ex-program schedule, staff schedules, and ongoing meetings)	Completed and passed Admin Data Entry Training	Staff whose job duties include setting up and managing Scheduler information in CCBH
FINANCIAL	Consult the Financial Eligibility and Billing Manual on the Optum website or email MHBillingUnit.HHSA@sdcounty.ca.gov	None	Staff whose job duties include entering insurance and financial information into CCBH
REPORTS	Providers interested in CCBH Reports will be directed to the Reports Manual and a link to a video tutorial on the Optum website only	None	Admin staff who will be responsible for running reports for their program

If you are an approved Medical Records Tech with dual IDs, you only need to attend Admin Data Entry to obtain access for both accounts! If you have already attended Admin Data Entry, please email sdu_sdtraining@optum.com.

Questions about registration? E-mail us at:
sdu_sdtraining@optum.com



CLINICAL CRISIS HOUSE TRAINING

* ASSESSMENTS *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

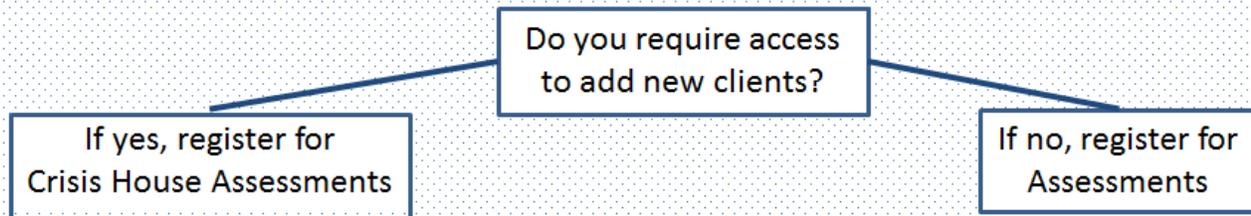
REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.

PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

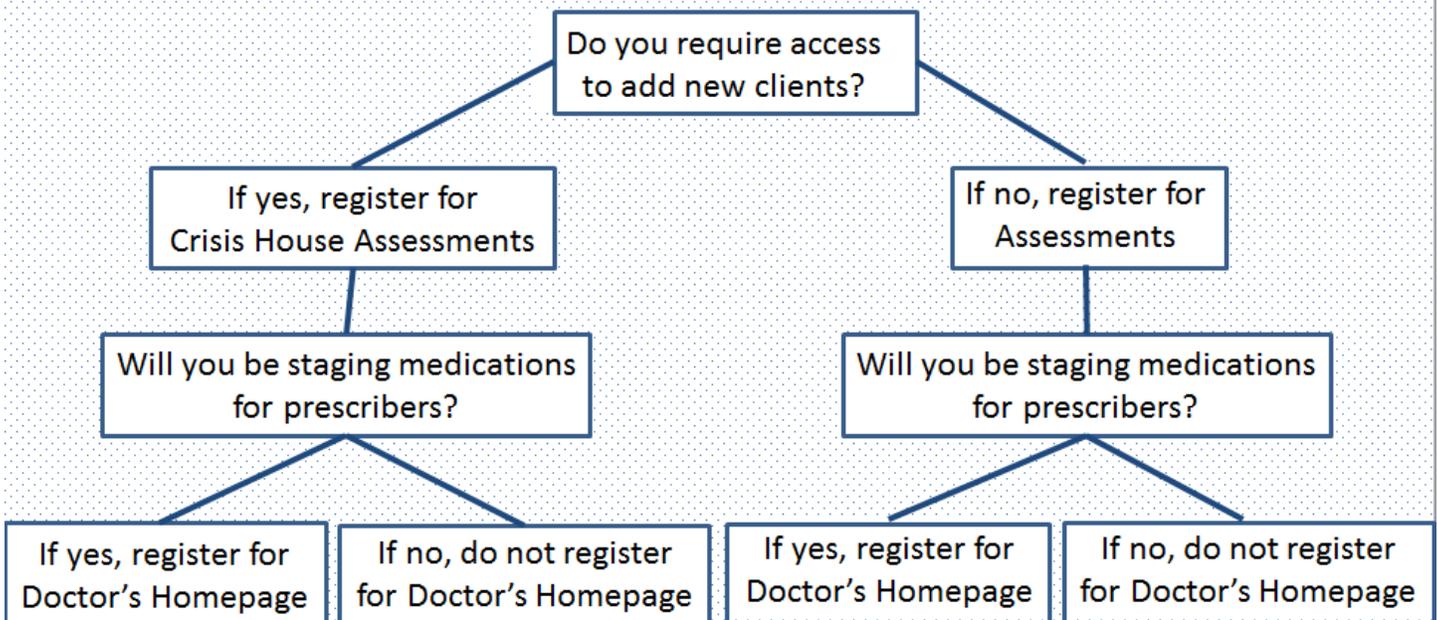
*** Note:** Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule.

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
CRISIS HOUSE ASSESSMENTS - ADD ACCESS	Learn to locate clients, to use the Clinician's Homepage to manage client information in the EHR, to add and complete clinical assessments, to access information to coordinate client care, to add new clients, and to open assignments to unit/subunit	None	24-hour program staff who complete clinical assessments for clients at their program and carry a caseload. Staff job duties may include searching for and/or adding new clients, and opening assignments to the Unit/SubUnit

Crisis House Clinician Track



Crisis House Nursing Track



CLINICAL AND MHRS STAFF (ADULT PROGRAM) TRAINING

* ASSESSMENTS *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit
REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.
PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
ASSESSMENTS - ADD ACCESS	Learn to locate clients assigned to the staff's Unit/SubUnit, to use the Clinician's Homepage to manage client information in the EHR, to add and complete clinical assessments, and to access information to coordinate client care	None	Staff who complete clinical assessments for clients at their program and carry a caseload

* CLIENT PLANS AND PROGRESS NOTES *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit
REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.
PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

Choose only one of the courses below

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
PROGRESS NOTES	Learn to locate and view Client Plans for clients assigned to the staff's Unit/SubUnit Learn to locate, view, and add Progress Notes in the EHR for clients assigned to the staff's Unit/SubUnit	Completed and passed Assessments Training These may include: <ul style="list-style-type: none"> • Assessments Add Access Training • Email MH MIS for View Only Access 	Staff who add Progress Notes and look at Client Plans in the clinical record but DO NOT add, review, revise, sign, and/or co-sign Client Plans
OR			
CLIENT PLANS and PROGRESS NOTES	Learn to locate and add, review, revise, sign, or co-sign Client Plans for clients assigned to the staff's Unit/SubUnit Learn to locate, view, and add Progress Notes in the EHR for clients assigned to the staff's Unit/SubUnit	Completed and passed Assessments Add Access Training	Staff who add Progress Notes in the clinical record AND add, review, revise, sign, and/or co-sign Client Plans

If your program only enters Limited Services Logs (LSL), register for the Progress Notes class and indicate your need for LSL access when prompted by the screening question. You will then learn how to add and close LSLs during the Progress Notes class.

For medical staff working at a day treatment program, register for the Progress Notes class and indicate your need for Interim Folder access when prompted by the screening question. You will then learn how to add and modify Interim Folder dates during the Progress Notes class.

PARAPROFESSIONAL STAFF TRAINING

* VIEW ONLY—ASSESSMENTS ACCESS *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

For View Only Access, there is no training class to take. Staff receive access automatically. Once forms are processed by MH MIS, MH MIS sends an email to the staff that includes login information, a resource packet, and a link to a video tutorial.

* PROGRESS NOTES *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.

PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
PROGRESS NOTES	<p>Learn to locate and view Client Plans for clients assigned to the staff's Unit/SubUnit</p> <p>Learn to locate, view, and add Progress Notes in the EHR for clients assigned to the staff's Unit/SubUnit</p>	View Only Assessments Access forms processed by MH MIS	Staff who add Progress Notes and look at Client Plans in the clinical record but DO NOT add, review, revise, sign, and/or co-sign Client Plans

Tips:

Before you register for training online, talk to your Program Manager to make sure that you're registering for the correct class.



To register for training, go to the www.regpack.com/reg/optum website and follow the directions on page 3.

PRESCRIBER STAFF TRAINING

* ASSESSMENTS *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.

PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
ASSESSMENTS- ADD ACCESS	Learn to locate clients assigned to the staff's Unit/SubUnit, to use the Clinician's Homepage to manage client information in the EHR, to add and complete clinical assessments, to access information to coordinate client care	None	Staff who complete clinical assessments for clients at their program and carry a caseload

* PROGRESS NOTES *

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.

PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
PROGRESS NOTES	Learn to locate and view Client Plans for clients assigned to the staff's Unit/SubUnit Learn to locate, view, and add Progress Notes in the EHR for clients assigned to the staff's Unit/SubUnit	Completed and passed Assessments Training	Staff who add Progress Notes and look at Client Plans in the clinical record but DO NOT add, review, revise, sign, and/or co-sign Client Plans

NURSING STAFF TRAINING

ASSESSMENTS

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit
REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.
PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

Choose only one of the options below

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
ASSESSMENTS- ADD ACCESS	Learn to locate clients assigned to the staff's Unit/SubUnit, to use the Clinician's Homepage to manage client information in the EHR, to add and complete clinical assessments, and to access information to coordinate client care	None	Staff who complete clinical assessments for clients at their program and carry a caseload

Note: For View Only Access, there is no training class to take. Staff receive access automatically. Once forms are processed by MIS, MIS sends an email to the staff that includes login information, a resource packet, and a link to a video tutorial."

PROGRESS NOTES

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit
REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.
PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR THE FOLLOWING STAFF
PROGRESS NOTES	Learn to locate and view Client Plans for clients assigned to the staff's Unit/SubUnit Learn to locate, view, and add Progress Notes in the EHR for clients assigned to the staff's Unit/SubUnit	Completed and passed Add Access Assessments Training	Staff who add Progress Notes and look at Client Plans in the clinical record but DO NOT add, review, revise, sign, and/or co-sign Client Plans

Staff needing View Only Access will only be eligible to take Progress Notes, not Client Plans and Progress Notes.

PRESCRIBER AND NURSING STAFF CONTINUED...

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.

PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR FOLLOWING STAFF
DOCTOR'S HOMEPAGE	Learn how to use the Doctor's Homepage to manage client information in the EHR, to add/edit medications and medical conditions, and to electronically prescribe medications	Completed and passed Add Access Assessments Training	Staff who will enter in medical conditions and stage or write prescriptions. <i>*If nursing staff will not be staging medications, they <u>do not</u> need to take DHP</i>

Did you know?

- When prescriptions are transmitted through the electronic health record database, there is higher medication compliance.
- In the United States about 20% of handwritten prescriptions go unfilled every year.

Questions about registration?

E-mail us at:

Sdu_sdtraining@optum.com



Questions about ARF paperwork?

E-mail MH MIS at:

BHS-AccountRequest.HHSA@sdcounty.ca.gov

SPECIAL ACCOMMODATIONS

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit
REGISTRATION: Go to the www.regpack.com/reg/optum website and follow the prompts. After you complete the process, you will receive an email confirmation for the class.
PAPERWORK SUBMISSION: Follow the paperwork requirement and timelines

*** Note: Trainees who do not submit ARF paperwork and are not cleared by MH MIS 7 calendar days prior to training, may be turned away and asked to reschedule. ***

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR FOLLOWING STAFF
SPECIAL ACCOMMODATIONS	To complete a training class with your program internally, rather than through the standard training process, email MH MIS	See "Pre-Requisite" section for the requested training	Staff with physical/ learning disabilities and/or expedited access needs

EXTENDED LEAVES

Instructions and guidelines for staff who know they are going to be out on leave for more than 90 days:

- Program Manager must notify the MH MIS Unit via email immediately and report the start and expected return date of the leave. This is only for those staff that due to a leave from work will not have access to log in and use the system
- Due to County policy, any account not active for 90 days or more must be deactivated for security reasons
- To regain access, the following must be completed and submitted to the MH MIS Unit: a new ARF, SOP, and ESA (if staff are employed by the County of San Diego, the SOP is not required)
- Processing of the account re-activation will take up to two weeks. It is suggested that paperwork be completed and submitted to MH MIS (with all necessary signatures) by the Program Manager up to two weeks prior to the staff scheduled return date.
- Once the staff returns from leave and have active account access, MH MIS will request a skills assessment evaluation. The evaluation is to determine if the staff can demonstrate the ability to successfully and independently navigate the system to complete their job duties proficiently in CCBH and determine whether they require full CCBH training or not.

NOTE: To be considered for a skills assessment in lieu of training, staff must have used CCBH consistently and demonstrated competence based on job duty access prior to leave.

EXTENDED LEAVE

REQUIRED PAPERWORK: SOP, ARF, and ESA forms need to be submitted to the MH MIS Unit

TIMEFRAME: Two weeks prior to the staff scheduled return date

PAPERWORK SUBMISSION: BHS-AccountRequest.HHSA@sdcounty.ca.gov

NAME OF TRAINING	DESCRIPTION	PRE-REQUISITES	FOR FOLLOWING STAFF
SKILLS ASSESSMENT SESSION	<p>Evaluation for proficiency, retention, and independent navigation of the CCBH system. Those who do not pass will receive practice recommendations. They will then register for the appropriate class(es).</p> <p>Access will not be granted to those who do not pass.</p>	None	Open to all staff for all training. Program Manager must communicate the needs of the staff in order to schedule accordingly

LOCKED ACCOUNTS

When CCBH accounts are locked for 90 days or more:

- Staff should contact MH MIS at MISHelpDesk.HHSA@sdcounty.ca.gov for direction.
- MH MIS Staff will assess needs and direct staff with further instructions.
- If approved, an Optum Staff will email the staff the required PowerPoint, sign-in sheet, schedule the Skills Assessments appointment.
- Staff will review the PowerPoint and complete the sign-in sheet.
- Staff will send the Optum Staff an email stating they reviewed the PowerPoint.
- Staff will also scan/email the signed sign-in sheet.

For CCBH accounts locked less than 90 days:

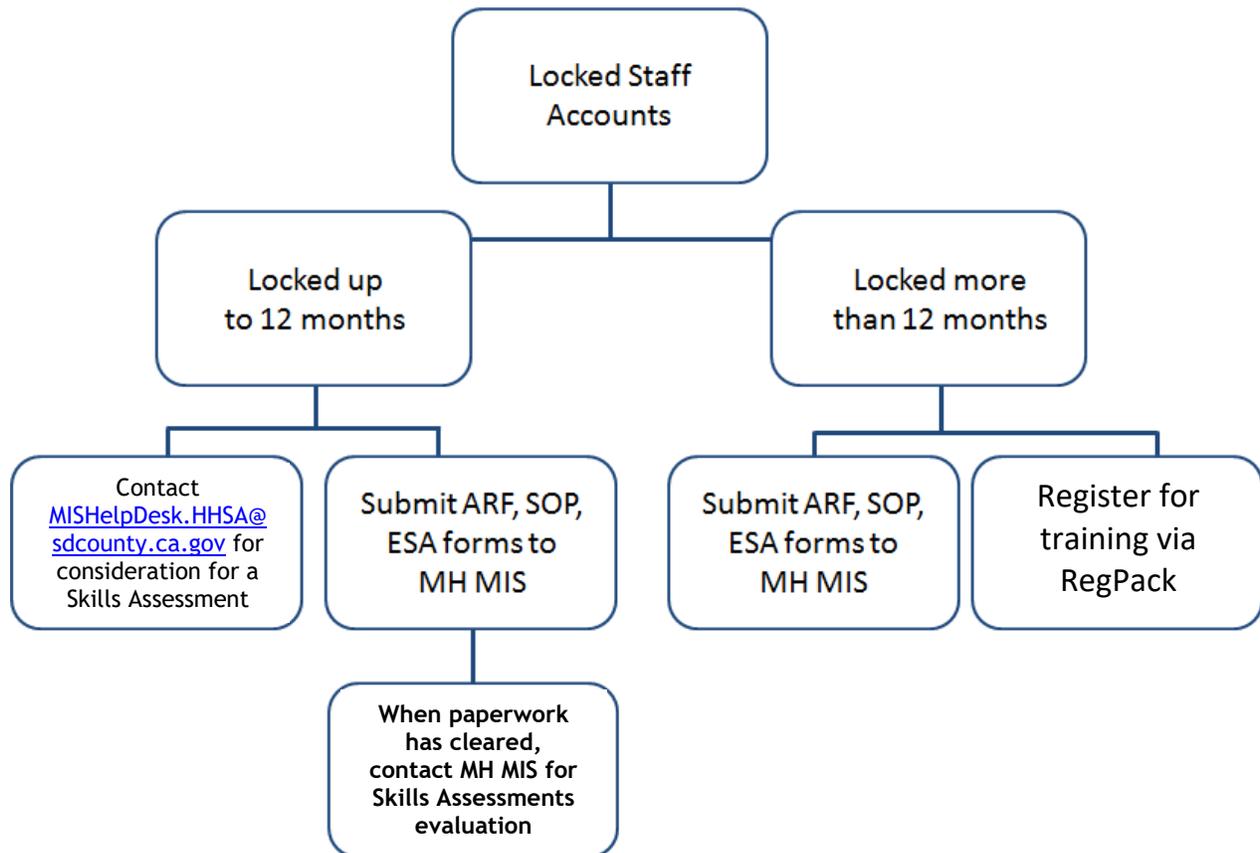
- Contact Optum Support Desk at 1-800-834-3792 Option 1.

Optum provides a shadowed Skills Assessment session remotely. Staff will log into the CCBH Train environment at their place of work (Optum will provide a password if necessary). Optum will shadow the user to perform the required functions respective of their job role. Staff must be able to independently demonstrate their proficiency in using the system according to their job duties.

If Optum determines staff cannot show proficiency, they will require staff to register for virtual training through the RegPack website.

If Optum determines staff proficiency, they will reactivate the staff's account in Live.

LOCKED ACCOUNT FLOW



LOGISTICS

WHAT TO EXPECT: Training is held virtually.

You will receive an email from the trainer on the morning of your training date. The email will include your training materials, instructions to login, and video tutorial link. You can expect to receive the email between 8:30AM - 8:45AM on the training date.

You will have until 4:30PM to complete your work. However, the trainer will give you a 4:00PM deadline so they have enough time to check your work and reply back, if corrections are needed. While the training class is virtual/remote, trainers will be available for questions and provide support throughout the day via email and/or phone calls.

To register for training, go to the www.regpack.com/reg/optum website, and follow the directions on page 3 in this registration guide.

Questions about registration?

**E-mail us at:
sdu_sdtraining@optum.com**

**Or call Optum at:
800-834-3792
(Option #3)**

