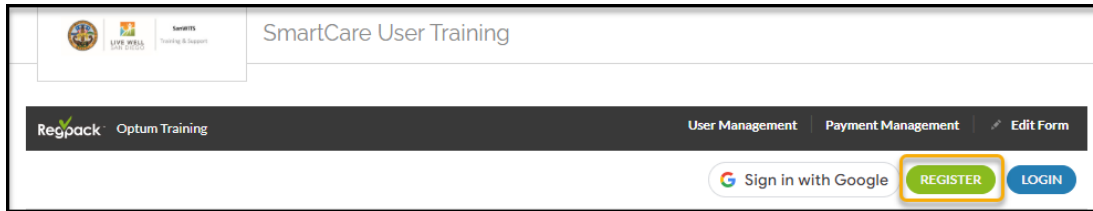


## SmartCare Training Registration Tip Sheet

### Step 1. – Create Account

- Using Google Chrome or Mozilla Firefox, Go to <https://www.regpack.com/reg/SmartCare>
- Click the **Register** button located near the top right corner of the page.



- You will be directed to the **Create Account** page.
- Complete all fields accordingly and click **"Sign Me Up!"**

A screenshot of the "Create Account" registration form. The form is titled "Create Account" and includes instructions: "Create an account below by completing the required fields. Red circles note mandatory fields." A yellow arrow points to a note: "All passwords MUST be at least 6 characters and contain no special characters (i.e. !@#\$%^&\*)". Below this, it states "Browser Requirements: This system will work with all major browsers. IE11, Google Chrome, Firefox, and Safari." The form fields are: "Account Contact First Name", "Account Contact Last Name", "Email:", "Password:", and "Confirm Password:". Each of the last three fields has a red circle next to it, indicating they are mandatory. A "Keep me logged in" checkbox is located below the password fields. A green "SIGN ME UP!" button is at the bottom right, with a yellow arrow pointing to it.

## Step 2- Complete Application

- Once your account is created, you will be taken to your Dashboard (homepage).
- Click **Complete My Application Now!**

The screenshot shows a dashboard interface. At the top, it says "Dashboard". Below this is a dashed box containing instructions: "This is your Dashboard. It provides an overview of your entire account. Click **Add Registrant Profile** to create a profile and make selection. Use the **progress bar** to track progress, view or navigate to other forms." Below the instructions is a "Registrant Profile(s)" section with a red button labeled "+ ADD ANOTHER REGISTRANT". Underneath is an "Account Contact Section" with a progress bar at 0%. The status is "Missing Mandatory" and it says "You have not yet completed all forms necessary to the completion of your application. Account Contact Confirmation". A blue button labeled "COMPLETE MY APPLICATION NOW!" is highlighted with a yellow border.

- Confirm your account contact Information
- Click **Go to Next Step**

The screenshot shows the "Account Contact Confirmation" page. It features a dashed box with instructions: "Please confirm the person managing the account and entering registrant information. Use the **progress bar** above to track your progress, view or navigate to other forms. You will be able register yourself and other registrant(s) after completing this step." Below this are three input fields: "Account Contact First Name", "Account Contact Last Name", and "Account Contact Work Email". Each field has a green checkmark to its right. A yellow box highlights these fields and the "GO TO NEXT STEP >>" button at the bottom right. A yellow arrow points to the "Skip this step" link on the left.

### Step 3- Enter Registrant Information

- Complete all fields accordingly, then click **Go to Next Step**

Registrant Information

Red circles note mandatory fields.  
Use the progress bar above to track your progress, view or navigate to other forms.

Enter the information of the staff that will be attending training:

Registrant Legal First Name  ○

Registrant Legal Middle Name

Registrant Legal Last Name  ○

Registrant Work Email  ○

\*\*Enter a work email address. Personal email addresses will not be used for training classes.\*\*

Program Name:  ○

Job Title:  ○

Credentials, if any:  ○

Work Phone  -  -  ○

Extension

Supervisor's Name  ○

Supervisor's Work Email:  ○

Will you be bringing sign language interpreter(s) with you?  yes  no

If you have any training registration questions please contact:  
Optum: 800-834-3792 Option 3 or sdu\_sotraining@optum.com

If you have any User Support Questions please contact:  
BHS\_EHRProject.HHSA@sdcounty.ca.gov

 **GO TO NEXT STEP >>**

### Step 4- Acknowledge you have completed or will complete your required CalMHSA LMS modules.

- Mark the acknowledgement checkbox
  - **Note:** Failure to complete CalMHSA LMS modules at least 7 calendar days from the selected training date, will result in exclusion.
- Click **Go to Next Step**

CalMHSA Required LMS Training by Role


**\*\*You must complete your required CalMHSA LMS Module training prior to registering for any additional training or support.\*\***  
Please check the CalMHSA grid (click below).

**CalMHSA Required LMS Training by Role Grid**

Please visit [California Mental Health Services Authority Learnings](#): Log in to the site to complete your required training for your role.

I acknowledge I have completed OR will complete the required CalMHSA LMS Modules for my role at least (7) calendar days from my selected training date. ○

\*\*Note: Failure to complete the required CalMHSA training modules at least (7) calendar days from the selected training date will result in exclusion from the training session(s) selected. \*\*

 **GO TO NEXT STEP >>**

## Step 5- Complete Class Questionnaire

- Select your role
  - *Note: You can only select one role at a time. If you have multiple roles at your program, see page 6 for instructions on how to change roles.*
- Select a Training Session Modality (Onsite or Virtual)
- Click **Go to Next Step**

Select your Role:


- Outpatient Admin Clerical Front Desk
- Outpatient Clinical Direct Service
- Outpatient Prescribers
- Outpatient Nurses
- Admin Billing Only
- Program Managers, CORs, & QA (County & CBO)
- CSU Admin/Clerical
- CSU Clinical/Nurses/Prescribers
- Residential & Crisis Residential Admin/Clerical
- Residential & Crisis Residential Clinical/Nurses/Prescribers

Select Training Session Modality

- Onsite/In-Person
- Virtual/Remote

**\*\* You must complete your required CalMHSA LMS Module training prior to registering for any additional training or support.\*\***

If you have any registration questions please contact Optum:  
800-834-3792 Option 3 or sdu\_sdtraining@optum.com

 **GO TO NEXT STEP >>**

## Step 6- Make a Training Selection

- Select a training date option
- Click **Go to Next Step**

**Training Selection**

MAKE SURE TO SCROLL ALL THE WAY TO THE BOTTOM TO SEE ALL AVAILABLE SELECTIONS.

**SCHEDULES**

**Admin Clerical Front Desk- Onsite Training**

- Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM  
 Mon, Oct 21st, 2024 > Mon, Oct 21st, 2024  
 Mon | 9:00 am - 12:00 pm [View Days](#)  
 3160 Camino Del Rio South, San Diego, CA 92108 Room: Ramona
- Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM  
 Fri, Nov 01st, 2024 > Fri, Nov 01st, 2024  
 Fri | 9:00 am - 12:00 pm [View Days](#)  
 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian
- Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM  
 Mon, Nov 18th, 2024 > Mon, Nov 18th, 2024  
 Mon | 9:00 am - 12:00 pm [View Days](#)  
 3160 Camino Del Rio South, San Diego, CA 92108 Room: Ramona

Red circles note mandatory choices.  
 Use the progress bar above to return to make more choices whenever you'd like.

If you have any questions please contact Optum:  
 800-834-3792 Option 3 or sdu\_sdtraining@optum.com

[GO TO NEXT STEP >>](#)

**Step 7- Congratulations! - You have successfully registered for training**

- Click **Finished**

**Registration Complete**

## Congratulations!

You have successfully registered for training.

You will receive a confirmation email.  
 If you have any questions please contact Optum:  
 800-834-3792 Option 3 or sdu\_sdtraining@optum.com

[FINISHED >>](#)

- When finished, a window will appear and ask if you want to add another registrant.
- If you'd like to add another registrant, click **Yes! Add Another** or click **No, I am done**

**Add another?**

Would you like to add a new record to your account? Note that you can always add another later on the dashboard.

[No, I am done](#) [YES! ADD ANOTHER](#)

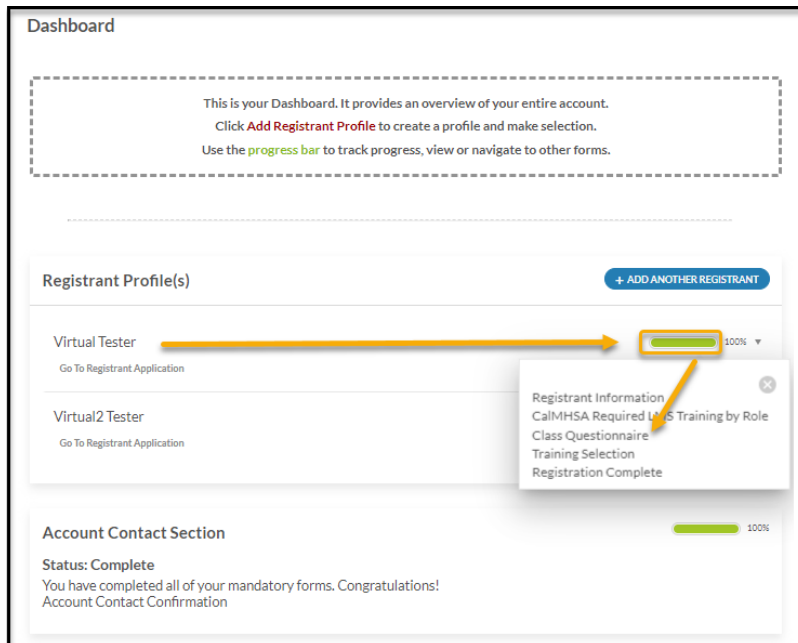
*Note: You will receive a confirmation email with the training class name and date you selected*

## How to change/select a different role

Prior to this revision, users had to add themselves as “another registrant” to be able to select a different role and register for training. Users no longer need to do that. Users can now update their Class Questionnaire form and new training dates for the new role will appear. See steps below.

### Step1. Update Class Questionnaire

- Within your Dashboard, click on the green progress bar located to the far right of your name
- Click on **Class Questionnaire**



- The screen will display any previous selection made, select a different role
  - You may change your Training Modality as well, if you prefer.
- Click **Go to Next Step**

### Class Questionnaire

This form begins the process of adding registrant profile(s).  
 Each registrant requires a separate profile.  
**Red circles** note mandatory fields.  
 Use the **progress bar** above to track your progress, view or navigate to other forms.

Select your Role:


- Outpatient Admin Clerical Front Desk ✓
- Outpatient Clinical Direct Service
- Outpatient Prescribers
- Outpatient Nurses
- Admin Billing Only
- Program Managers, CORs, & QA (County & CBO)
- CSU Admin/Clerical
- CSU Clinical/Nurses/Prescribers
- Residential & Crisis Residential Admin/Clerical
- Residential & Crisis Residential Clinical/Nurses/Prescribers

Select Training Session Modality

- Onsite/In-Person ✓
- Virtual/Remote

**\*\* You must complete your required CalMHSA LMS Module training *prior* to registering for any additional training or support.\*\***

If you have any registration questions please contact Optum:  
 800-834-3792 Option 3 or sdu\_sdtraining@optum.com

 [GO TO NEXT STEP >>](#)

- Select a new training date option from the list and click **Go to Next Step**

### Training Selection

MAKE SURE TO SCROLL ALL THE WAY TO THE BOTTOM TO SEE ALL AVAILABLE SELECTIONS.


**SCHEDULES**

Admin/Clerical Front Desk - Virtual Training

- Virtual Admin/Clerical Front Desk Training -- Afternoon Session -- 1:00PM - 4:00PM  
 Fri, Nov 01st, 2024 > Fri, Nov 01st, 2024  
 Fri | > 1:00 pm - 4:00 pm View Days  
 Virtual/Remote
- Virtual Admin/Clerical Training -- Afternoon Session -- 1:00PM - 4:00PM  
 Mon, Nov 18th, 2024 > Mon, Nov 18th, 2024  
 Mon | > 1:00 pm - 4:00 pm View Days  
 Virtual/Remote

**Red circles** note mandatory choices.  
 Use the **progress bar** above to return to make more choices whenever you'd like.

If you have any questions please contact Optum:  
 800-834-3792 Option 3 or sdu\_sdtraining@optum.com

 [GO TO NEXT STEP >>](#)

- You will be returned to your Dashboard. You are done!

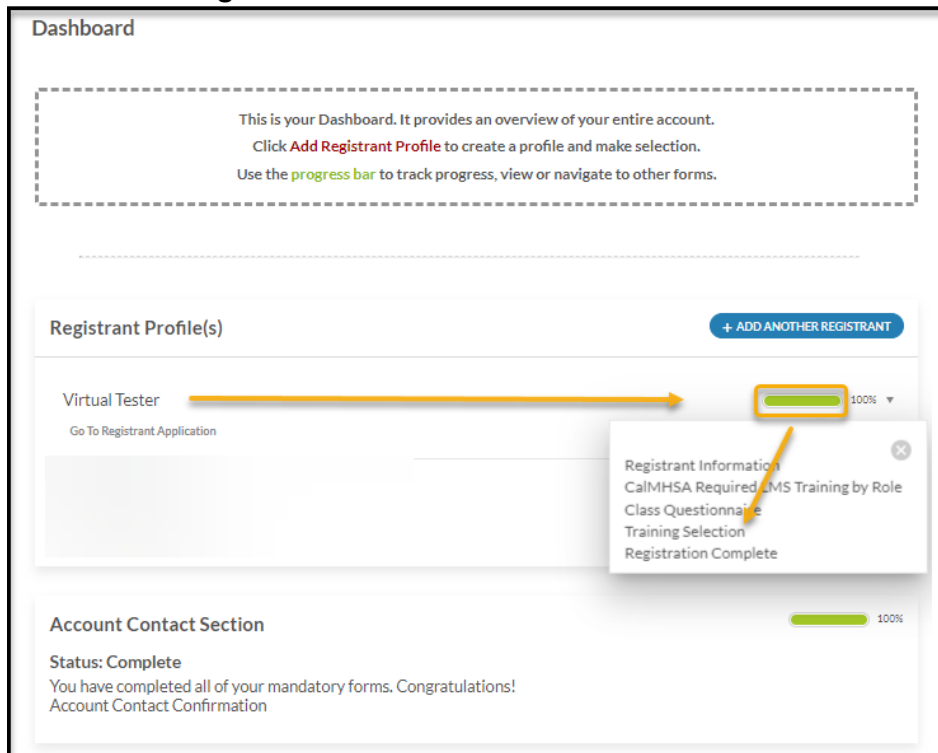
- If you do not receive a new training confirmation email, you may request one by sending an email to [sdu\\_sdtraining@optum.com](mailto:sdu_sdtraining@optum.com)

## **How to change a Training Modality and keep the same role**

If you'd like to keep your current role and only change your training modality, please follow steps below. However, if you'd like to change your training modality and your role, please refer to steps on "How to change/select a new role" starting on page 6.

### **Step 1- Remove current training selection**

- Within your Dashboard, click on the green progress bar located to the far right of your name
  - Click on **Training Selection**



- Locate your current training selection, and click **Remove**



## Training Selection

MAKE SURE TO SCROLL ALL THE WAY TO THE BOTTOM TO SEE ALL AVAILABLE SELECTIONS.

### SCHEDULES

Site Lead Admin - Onsite Training

Site Lead Admin - Onsite Morning Session  
 Mon, Jul 29th, 2024 > Mon, Jul 29th, 2024  
 Mon | > 9:00 am - 11:30 am | View Days  
 Training Address: 3160 Camino del Rio South, San Diego, CA 92018  
 1 in your cart already **Remove** ←

Site Lead Admin - Onsite Afternoon Session  
 Wed, Jul 31st, 2024 > Wed, Jul 31st, 2024  
 Wed | > 1:00 pm - 3:30 pm | View Days  
 Training Address: 3160 Camino del Rio South, San Diego, CA 92018

Site Lead Admin - Onsite Afternoon Session  
 Fri, Aug 02nd, 2024 > Fri, Aug 02nd, 2024  
 Fri | > 1:00 pm - 3:30 pm | View Days  
 Training Address: 3160 Camino del Rio South, San Diego, CA 92018

## Step 2- Update Class Questionnaire/Change Training Modality

- Click on the blue progress bar located on the top right corner of your name
- Click on **Class Questionnaire**

The screenshot shows the Regpack Optum Training dashboard. At the top right, there is a navigation bar with 'User Management', 'Payment Management', and 'Edit Form'. Below this, the user's name 'Virtual Tester' is displayed with a blue progress bar at 80%. A dropdown menu is open, showing options: 'Registrant Information', 'CalMHSA Required LMS Training by Role', 'Class Questionnaire' (highlighted with an orange arrow), 'Training Selection', and 'Registration Complete'. At the bottom of the dropdown is a 'DASHBOARD' link. The main content area shows a red bar and the text 'Class Questionnaire'.

- The screen will display any previous selection made, change the training modality
- Click **Go to Next Step**

**Class Questionnaire**

This form begins the process of adding registrant profile(s).  
 Each registrant requires a separate profile.  
**Red circles** note mandatory fields.  
 Use the **progress bar** above to track your progress, view or navigate to other forms.


Select your Role:

Select Training Session Modality

Onsite/In-Person ✓  
 Virtual/Remote via MS Teams

**\*\* You must complete your required CalMHSA LMS Module training prior to registering for any additional training or support.\*\***


If you have any registration questions please contact Optum:  
 800-834-3792 Option 3 or [sdu\\_sdtraining@optum.com](mailto:sdu_sdtraining@optum.com)

 **GO TO NEXT STEP >>**

- Select a new training date option from the list and click **Go to Next Step**
- You will be returned to your Dashboard. You are done!
- If you do not receive a new training confirmation email, you may request one by sending an email to [sdu\\_sdtraining@optum.com](mailto:sdu_sdtraining@optum.com)

**For additional assistance:**

If you have any registration questions, please contact Optum Training.

 800-834-3792, Option 3

 [sdu\\_sdtraining@optum.com](mailto:sdu_sdtraining@optum.com)