# Authorized Approvers Manual

Sacramento County EHR Training and Support

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# Registration Process

The registration process will vary depending on the classification of the staff. Below are the steps for registering each classification:

### Direct Care Staff

Direct Care Staff are licensed and non-licensed clinicians that will be providing services directly to clients, these users will need to be registered with QM and EHR team whether they will be using SmartCare or not.

For Direct Care staff, QM's Staff Registration Packet as well as the EHR Account/Training Registration Form should be submitted all together to QM Staff Registration @ DHSQMStaffReg@Saccounty.gov.

- QM offers a Staff Registration/Credentialing Training on a quarterly basis, which goes over how to complete the Staff Registration Packet. QM Training resources can be found at the following site, https://dhs.saccounty.gov/BHS/Pages/Provider-Training/GI-Provider-Resources-Training.aspx.

If the registered staff will be using the SmartCare, when the EHR team receives the EHR Account/Training Registration Form from QM, BHS-EHRTrainingReg@saccounty.gov will send you and the EHR user an email. A new user will be given instructions on how to create an account on the CalMHSA LMS portal.

- If the user has any trouble creating the account or accessing the portal, they should reach out to CalMHSA directly, EHR@Calmhsa.org.

Once they complete all required trainings and knowledge checks in the LMS portal, the user will need to respond back to the email sent by BHS-EHRTrainingReg@Saccounty.gov letting us know they've completed training. They may be asked to provide screenshots, since the LMS system does not update in real time. Once we verify training has been completed and that the user has signed their user acknowledgments, the new user will be sent login instructions.

If a user feels they need some additional support, we offer an optional live training via Zoom. Once they've completed the Direct Care Staff LMS video training, you can then register them for the Optional Direct Care Staff SmartCare Training on the scheduled training date posted on the EHR training schedule located here: https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx.

> ***Direct Care staff working at a newly established program will be expected to attend this training as a group since there won't be any current users at their new program to provide SmartCare guidance.*

## Admin Staff

Admin training is for non-clinical users such as administrative or billing staff. This training does not grant access to most clinical documentation.

For Admin Staff, their EHR Account/Training Registration Form can be sent directly to EHR Training Registration, BHS-EHRTrainingreg@Saccounty.gov. There is no paperwork submitted to QM staff registration for Admin staff.

Admin staff are required to complete the CalMHSA LMS training videos as well as attend the live Provider Admin SmartCare Training via Zoom. The LMS training videos need to be completed prior to attending the live Zoom training. Admin staff will need to complete the LMS videos and knowledge checks as well as the live Zoom training and quiz before receiving access to SmartCare.

## Agencies with their own EHR

**SUPT**

SUPT agencies who use their own EHR will still submit the QM packet as well as an EHR Account/Training Registration form for their direct care staff. SUPT Direct Care staff will still need access to SmartCare to enter CalOMS and the ASAM. SmartCare training will be required for these staff since they will be accessing SmartCare.

**MH**

Mental Health agencies with their own EHR will still need to submit the QM packet as well as an EHR Account/Training Registration form for their direct care staff in order to create a SmartCare account for billing purposes.

In section 2 of the EHR Account/Training Registration form please indicate that the user will not need to access SmartCare. SmartCare training is not required for these Direct Care staff, since they will not be accessing SmartCare. **All services and state reporting data should be entered into SmartCare by admin staff only.**

# How to fill out the EHR Account/Training Registration Form

When filling out the EHR Account/Training Registration Form, please make sure to use the most current copy saved on our website at the following link, https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx. This will ensure you are using the most updated version.

## Section 1- Request

The first section of the form is what drives your request. What you select determines the areas you complete for the remainder of the form.

**1. Request**

☐ Request for Training/Create Account (Complete Sec 2 & 4 ) ☐ Deactivate account ☐ Reactivate account (Complete Sec 2)

☐ Modify/Add Additional Permissions (Complete Sec 2 & 3) ☐ Add Legal Entity for existing user (Complete Sec 2)

- **Request for Training/Create Account:** This option is used for any new staff or staff who need additional training. This option is also used for staff who will not be accessing SmartCare, but just need an account created for billing purposes.
- **Modify/Add Additional Permissions:** This option is used for staff who need any modifications or additional permissions added. Some examples would be a name change, adding EPCS, or adding the diagnosis permission.
- **Deactivate Account:** When a staff member leaves your agency. This form should be completed with this option marked and sent to the EHR Team so we can deactivate the user's access to SmartCare.
- **Reactivate Account:** If a user is deactivated for non-use or if they already have an account created and are a returning user, then you will choose the option to reactivate the account.
    - **Reactivation Policy:** User accounts are deactivated for non-use after 90 days of non-use. After 90 days, the user has an additional 60 days to send in this form to reactivate their account, the form must be signed by you, the authorized approver. If the account has not been reactivated within this additional 60-day period, the user will need to attend live training again to reactivate the account. The reactivation form will still be necessary to register them for training. You can choose this option and select the appropriate training for their classification. Please reach out to the training registration desk (bhs-ehrtrainingreg@saccounty.gov) if you are not sure which training is required for reactivation.
- **Add Legal Entity for Existing User:** Use this option if the user has an existing SmartCare account and needs additional programs added. Some examples, if they are working at

two different agencies or if you want to include additional programs within your own agency.

## Section 2- User Information

**2. User Information** **Required fields outlined in red are needed in order to create the user's account

| Last Name: | First Name: | Legal Entity: |
|---|---|---|
| Program Name: | Program Liaison Email: | |
| User Phone Number: | User Email: | |
| Electronic Prescribing Controlled Substances (EPCS)<br>☐ (EPCS) Signature of Supervising Physician for NP – Required<br>Name:_____ Date:_____<br>Signature:_____ | Select if MH or SUPT Agency ☐ MH ☐ SUPT<br>Will this staff be using SmartCare? ☐ Yes ☐ No<br>Select User Role<br>☐ Admin<br>☐ Direct Care Staff<br>☐ Prescriber (Please add an Agency Fax Number for Prescriber)<br>Fax Number:_____ | |

- Fill in the users' first and last name. The Legal Entity box is a drop-down list, which will show the broad agency name (examples, Wellspace, Turning Point, El Hogar, etc.). Select your program's legal entity from the list. If you don't see your legal entity listed, please reach out to the training registration desk (bhs-ehrtrainingreg@saccounty.gov) and let them know so they can update the form.
- Under Program Name, enter the specific program(s) as it appears in SmartCare, where the person will need data entry access to within your legal entity. If they will need data entry access to all programs, write "all programs".
- Enter the user's phone number and both your and the user's email. It is important we have the correct email address for the user so we can send them the Zoom link for training.
- The fax number is required for prescribers due to prescribing set-up.
- EPCS: This section is only filled out for prescribers who need to prescribe controlled substances. If this does not apply to the user, leave it blank.
    - If the prescriber is a nurse practitioner, then the supervising physician will need to include their name and signature on the form as well.
    - For EPCS, we will send the prescriber the steps to set up their EPCS once we receive this form.
- Select whether the staff will need access to MH or SUPT.
- If your agency has its own EHR and the Direct Care staff will not be entering documentation into SmartCare, select **No** under "Will this staff be using SmartCare?"

- Select the user's role, this will drive their permissions and the trainings they are required to take. A user may have dual roles, they will just be required to complete additional training.

## Section 3- Modify/Add Additional Permissions

**3. Modify/Add Additional Permissions** (select all options below that apply. Please include any additional comments if needed)

☐ Add Diagnosis permission* ☐Change name - from _____ to _____ ☐Change User ID

This section is optional. It only needs to be filled out if a user needs access to the Diagnosis screen, if there was a name change, or if there is a request to change the user ID (typically requested with a name change).

Diagnosis permissions are given based off classification. Only licensed staff can diagnose (based on their license type). However, Admin or non-licensed staff can be granted access to the Diagnosis screen if it is requested in this section. This will allow them to enter a diagnosis on behalf of the licensed staff.

## Section 4- Class Training Dates

**4. Class Training Dates**

| Class Date | Class Name | | Class Date | Class Name |
|---|---|---|---|---|
| | | | | |
| | | | | |

Please include any comments regarding your request:

The training calendar can be found on our website at the following link, https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/EHR-Training.aspx. Find the appropriate training name and date on the calendar then enter the Class Date and select the Class Name from the drop-down list. When registering staff for the CalMHSA LMS Training, it's not necessary to enter the Class Date. Any additional comments regarding the request can be typed in this section.

Below is a description of each training:

**CalMHSA LMS Training**- This course is required for ALL users who will be accessing SmartCare. These training and knowledge checks should be completed prior to any additional Zoom training.

***~Staff who have a non-use account will not need to complete the LMS training.***

**BHS-SAC Team Training-** This is a Zoom training that is provided for internal Sacramento County staff who will be working on the BHS-Sac Team or another team that operates like BHS-SAC (County teams who link clients to provider programs). The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on one Training Registration form.

**CST Combined Training**- This is a Zoom training that is provided for internal Sacramento County CST staff. This training is considered a one-off and is not listed on the training calendar. If you are the authorized approver for the Sacramento County CST program, you can reach out to the training registration desk when you have a new hire that requires training, and we will coordinate a training date with you. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one Training Registration form.

**ECM Training:** This is a Zoom training that is provided for ECM Direct Care staff. ECM Admin staff do not need to attend this training, they will receive all necessary information when they attend the Provider Admin training. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form.

**MH Provider Admin Training:** This is a Zoom training that is required for Mental Health Admin staff or Direct Care staff working in a dual role (clinical and administrative). The training will cover how to set up a client in SmartCare, billing requirements, and how to complete pre-claiming corrections. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form. (The MH specific Provider Admin Training will be available beginning March 2025)

**MHTC Admin Training:** This is a Zoom training that is provided for MHTC Admin staff. MHTC Admin staff will also need to attend Provider Admin training, to learn the billing/corrections process. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form.

**MHTC MHW/Clinical Training:** This is a combined Zoom training that is provided for MHTC Mental Health Worker (MHW) & Direct Care staff. The training will cover both roles, and the MHW's will be dismissed from training once their portion is completed. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form.

**MHTC Nurses/Pharmacist Training:** This is a combined Zoom training that is provided for MHTC nurses & pharmacy staff. The content in the training will cover both roles. Under the Comments section, make sure to indicate to "add Avatar access" since orders will be entered into Avatar. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form. Once training is complete, there is an additional pre-recorded webinar that must be completed. This will go over the orders and eMAR process in Avatar. This will be sent to the user once they've confirmed they have completed the Zoom training quiz.

**MHTC Physician Training:** This is a Zoom training that is provided for MHTC physician staff. Under the Comments section, make sure to indicate to "add Avatar access" since orders will be entered into Avatar. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form. Once training is complete, there is an additional pre-recorded webinar that must be completed. This will go over the orders and eMAR process in Avatar. This will be sent to the user once they've confirmed they have completed the Zoom training quiz.

**Provider Service Corrections Training:** This is a Zoom training that is a continuation of Provider Admin Training. This training deep-dives into various service corrections including post claiming corrections. This training is for existing SmartCare users who have already attended Provider Admin Training. This

training is not required for all admin users, however, at least two people from each agency should be familiar with this process.

**Supplemental Direct Care Staff SmartCare Training:** This is optional Zoom training for direct care staff. This training is NOT required for new direct care staff. New direct care staff should still register for the LMS training to receive access to SmartCare. Once staff have completed the LMS training and have access to SmartCare, they can register for this training if they feel they need additional support. This training will only be required for new programs that are going live with SmartCare or for staff who are reactivating their account. (This training will be available beginning March 2025)

**SUPT Provider Admin Training:** This is a Zoom training that is required for Substance Use Prevention Treatment Admin staff or Direct Care staff working in a dual role (clinical and administrative). The training will cover how to set up a client in SmartCare, billing requirements, and how to complete pre-claiming corrections. The CalMHSA LMS training courses are a pre-requisite to this course. Staff can sign up for both classes on the one form. (The SUPT specific Provider Admin Training will be available beginning March 2025)

## User Acknowledgement Agreement

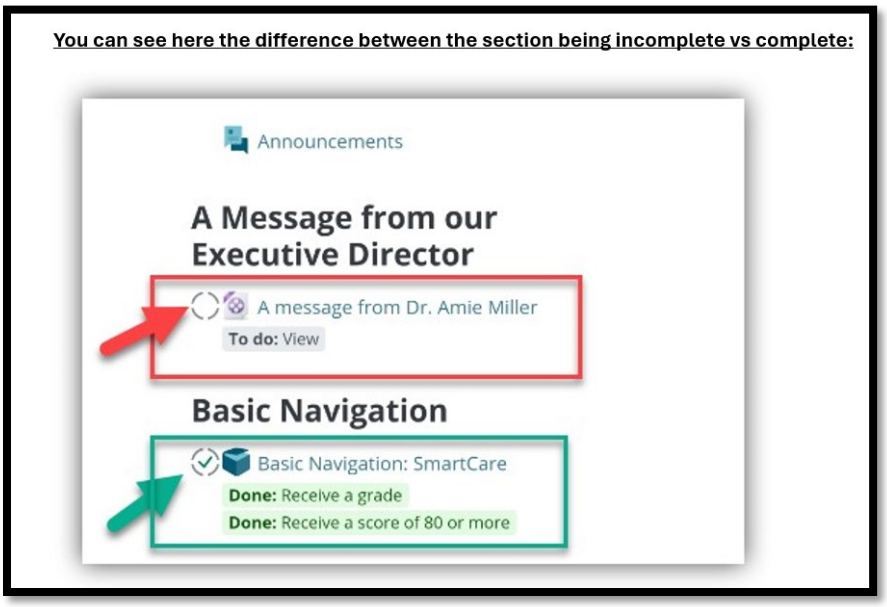
The user and you will need to sign the registration form. Please make sure BOTH signatures are on the form before sending. If you register new staff prior to them starting at your agency, we will accept the form without the user's signature, however, we will require a form with the user's signature prior to them gaining access to SmartCare.

# FAQ's

This section will go over training/EHR account guidelines as well as general processes that may affect your staff's account.

- **How Long does it take to set up a user account?**
    - It may take up to 5 business days to create a new user account once all information is received. For Zoom training, the training registration form must be received at least 2 business days prior to the date of training. Staff must be registered to attend Zoom training. If staff join the training when not registered and have not received a confirmation email, they will be asked to reschedule.
- **Once a user completes training how do you get access into SmartCare?**
    - We ask users to respond back to the email once they've completed training. Please follow up with your staff to make sure they respond to us once they've completed their training. If this step is forgotten, their access to SmartCare will be delayed.
- **How long do staff have to take the quiz after attending training?**
    - After staff have completed Zoom training a quiz will be emailed to them. They do not have to take it right away but, they have to take it within 30 days. If they do not take the quiz within 30 days, they will need to re-attend training.
- **Why are my staff being asked to send a screenshot?**
    - Since the CalMHSA LMS system does not update in real time, we may ask for screenshots showing that a section was completed. Below is an example of a screenshot that may be requested. We will send instructions on how to get to the screenshot as

well. Users can either send us the screenshot verifying they completed training, or, wait 2 business days for the LMS system to update on our end for verification.




- **What is the process for a staff member who gets locked out of SmartCare or needs a password reset?**
    - If a user gets locked out of SmartCare they will need to call the support line at 916-876-5806 anytime between Monday through Friday 8am-5pm. We are unable to unlock accounts or update passwords via email, it must be done over the phone. If a user works during non-business hours, they will still need to call during business hours to reset the password. The user does not need to be at a computer when they call, we will ask a couple security questions to verify their identity, then we will give a temporary password over the phone. They can then use that later while at work.
- **What is the process to recover a staff member's username?**
    - If a user forgets their SmartCare username, we cannot give that information out over the phone. This is one of the security questions we ask when resetting passwords, so we cannot give that information out to the caller. As the authorized approver, you can email bhs-ehrtrainingreg@saccounty.gov requesting that person's username. We recommend cc'ing that user to the email. We will then respond back with the user's username. Please pass that information on to the user locked out of the system. They can then call us for a password reset.
- **What is the deactivation policy?**
    - User accounts are deactivated after 90 days of non-use. To have an account reactivated, an EHR Account/Training Registration Form must be sent to bhs-ehrtrainingreg@saccounty.gov. If it has been less than 60 days since the user account was deactivated, no training is necessary, we will just need the signed reactivation form. If the user's account has been deactivated for over 60 days, they will need to retake

training. You'll sign them up for the appropriate training to have their user account reactivated. Please reach out to the training registration desk (bhs-ehrtrainingreg@saccounty.gov) if you are not sure which training is required for reactivation. If you are unsure whether it has been past 60 days, you can email the training registration desk and ask them if training is required.

- **Why are my staff unable to access their full set of procedure codes or unable to enter an assessment?**
    - For direct care staff, the staff license is what drives staff permissions. If the license expires in the system, the staff member will not have the ability to document into the system. Make sure to contact Sacramento County of Sacramento DHS BHS QM staff registration at DHSQMStaffReg@Saccounty.gov when a staff member's license information is updated.
- **What are the training expectations for staff attending live Zoom training?**
    - The length of a scheduled Zoom training will vary depending on the frequency of attendees' questions, connectivity issues, or number of attendees. When the zoom link is sent out, we put the estimated time on the link. We typically schedule training courses a bit longer than expected to complete to allow plenty of time for questions. Staff are required to stay for the entire duration of the training to receive credit for attending. We do check-ins at the beginning of training and after any scheduled breaks or lunches. If an attendee fails to check in with the trainer, they will be marked as absent, and their training will need to rescheduled. The trainers will send a message on Zoom and will call out the attendee by name multiple times before marking them as absent. If an attendee shows up more than 15 minutes late or leaves early, they will be asked to reschedule. Attendees should be available to join on camera, unmute their audio, and participate in the chat as well as periodic pop-up knowledge checks throughout the training.
- **What is the User Forum?**
    - The EHR Team hosts bi-monthly virtual User Forums via Zoom. The User Forums are scheduled separately for Mental Health and SUPT provider agencies. During the forum, we share EHR team updates, go over new reports or functionality, provide demos of various screens or new processes, and provide an opportunity for users to ask questions. The User Forum schedule is posted on our webpage at the following link, https://dhs.saccounty.gov/BHS/BHS-EHR/Pages/GI-Meetings.aspx. As the authorized approver, you will automatically be added to the EHR email distribution list. We ask that each agency has at least one representative at each meeting who will take back the information shared to the rest of their agency.

## New Authorized Approvers

There should be at least two Authorized Approvers per agency. When an approver leaves an agency, please follow up with BHS EHR Training Reg to remove the previous Authorized Approver and request to add a new Authorized Approver. If you are unsure of who the current authorized approvers for your agency are, you can request that information from the EHR Training Registration Desk.

Authorized Approver requests should be emailed BHS-EHRTrainingReg@Saccounty.gov. Please send the approvers' name, email, phone number, agency name and address (address only required for new programs).