San Bernardino BHMIS Phase I End User Training Agenda

CalPM ADT - DBH Contract Mental Health	
Date:	TBD
Course Instructor:	TBD
Duration:	1 Day
Super User Attending:	TBD
Location:	TBD
Roles required to complete:	INSERT ROLES HERE

DAY 1
DATE
Time: 8:00AM – 4:30PM

Objective:

EST. START/END TI	TOPIC	NOTE
8:00-8:30	**Welcome & Introductions** **Trainees Logging into Avatar**	
8:30 – 8:45	**Review of Learning Connect** **Avatar Basics** Logging In and Out Navigation of Home View My Forms Clients Widget Navigation of Chart View	
8:45 – 9:15	**Initial Contact Log Bundle** Call Intake Initial Contact Log Assign Permanent MR# CSI Assessment (Call Intake) / CSI Assessment	
9:15 – 9:45	**Hands on Exercise** Exercise 1 – Create 4 new clients using the Initial Contact Log Bundle Exercise 2 – Complete CSI Assessment on Two Clients Exercise 3 – Assigned MR Number for all clients	
9:45 – 10:15	**MH Registration Bundle** Admission (Outpatient) CSI Admission Program Assignment Emergency Contact **MH Admission Bundle** CSI Admission Diagnosis Sexual Orientation and Gender Identity (SOGI) Prevention and Early Intervention (PEI) **MH Discharge Bundle**	

	Program Assignment (Closing) Discharge	
10:15 – 10:30	**BREAK**	
10:30 – 11:15	**Hands on Exercise & Open Discussion** Exercise 4 – Using Admission Outpatient Form add MF Financial Episode Exercise 5 – Using MH Registration Bundle, created the Program Episode	
11:15 – 12:00	Financial Eligibility • Customize Guarantor Real Time Inquiry (270) Request	
12:00 – 1:00	**LUNCH**	
1:00 – 1:30	**Hands on Exercise & Open Discussion** Exercise 6 – Using Financial Eligibility Form, Add Medi-Cal MH to the MH Financial Episode Exercise 7 - Using the financial eligibility form, link the financial information from the MH Financial Episode to the San Bernardino OP episode	
1:30 – 1:45	**Client Update Bundle** Update Client Data Financial Eligibility Client Condition Pregnancy	
1:45-2:15	**Hands on Exercises** Exercise 8 - Using the Program episode, complete the MH Admission bundle on your 4 clients	
2:15 – 2:45	**Ancillary/Ambulatory Services** Client Charge Input • Group Charge Recurring Client Charge Input Edit Service information • Emergency Indicator Delete Service • Modifying indirect services Practitioner Only Service Delete	
2:45 – 3:00	**BREAK**	
3:00 – 4:30	**Hands on Exercise & Open Discussion** Exercise 9 – Using MH Discharge Bundle, end program assignment on one client Exercise 10 – Using client charge input, enter 371 to your test client then add the emergency indicator Exercise 11 – Using client charge input, add a indirect service to one of the clients.	
	DAY 2 **DATE**	

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	Time: 8:00AM – 12:00PM	
8:00-8:30	**Attendees Logging into Avatar**	
8:30 – 9:00	**Review Day 1**	
9:00 – 9:15	**Client Ledger** Simple Report Crystal Report	
9:15 – 9:30	**Client/Census Management Reports** Detail of Admissions by Program Detail of Discharge by Program Master Client Inquiry	
9:30 – 9:45	**BREAK**	
9:45 – 10:15	**Crystal Reports** MediCal Claim File Detail (MCFD) Provider Balance Listing (MHS127) Direct and Indirect Svcs Summary (PSP131) MediCal Eligibility Roster (MHS134) Monthly Client Charges Report (MHS941) Program Caseload (PSP121) Primary Staff active Caseload (SBC100) Client Services Listing (MHS912) Staff Activity Analysis (PSP117) Revenue Report Reporting Unit Service Summary (MHS142) Program Caseload Summary (MHS206B) Unduplicated Medi-Cal Client Count (MHS702) Client Face Sheet (MHS140) Staff Caseload Summary (MHS206A) Direct Service Detail Report Input Verification Caseload Status Report (DAS300)	
10:15 – 11:30	**Hands on Exercise & Open Discussion** Exercise 12 – Run Client ledger on the client you entered services on Exercise 13 - Using the client you discharged, document a incoming call using the Initial Contact Log Form, schedule the client for an appointment and enroll them into a new program. Exercise 14 - A new client calls and asks to be seen by in MH OP Program. It is determined the client is going to be seen by a clinician, so the client needs to be registered and scheduled for appointment. Run the Facesheet report to review client information. The client then arrives for their appointment, they are checked in and the admission paperwork is completed. Then enter in the services the clinician provided to the client.	
11:30 – 12:00	**Wrap Up**	

Specific Training Notes for this Course