SharePoint   Emily Parmenter ▾   ⚙   ?

iSITE CCHS INTRANET

CommunityConnect   Staff   Direct Services   Discussion Board   QI Team   IT Projects   Secured   Training   Behavioral Health

Onboarding Checklist

CMCT Case Manager Onboarding

Checklist:

1. **Case Manager Training Passport**
2. **PHCS Onboarding Requirements**
3. **CMCT eTc/LMS Training Login**
     ◦ Printing out your LMS Transcript - Tip Sheet
4. **Training Calendar Template**
5. **CMCT Policies**
     ◦ Home Visiting Safety Policy
         ▪ Home Visit Safety Presentation
     ◦ Milage Reinbursement Policy
     ◦ Training and Onboarding Policy
     ◦ Transportation Voucher Policy
         ▪ Transportation Voucher Workflow
     ◦ Translation and Interpreter Services Policy
     ◦ Dress Code Policy
     ◦ Suicide Risk Protocol
     ◦ Policy Review and Revision Policy
     ◦ Patient Enrollment and Assignment Policy
     ◦ Home Visiting Consent Policy
     ◦ Mandated Reporter Procedure
     ◦ Communication Guidelines
6. **Contra Costa Resource Scavenger Hunt**
7. **SharePoint Scavenger Hunt**

Required Trainings for CMCT Case Managers w/ Descriptions:

Course Name	Format	Description
ccLink Training *to be completed within first 8 weeks of employment	In Person	Introduction to ccLink, CCHS' electronic health record. This training gives the participant an overview of basic charting and specific CMCT workflows.
CMCT 101 *to be completed within first 8 weeks of employment	In-Person Power Point *Conducted by Director & Manager*	Big picture overview of CommunityConnect Pilot; includes information related to the waiver; program basics, patient identification, enrollment and assignment; evaluation; special projects; CMCT Team and Staff Engagement.
PHCS-CMCT Outreach & Engagement training Part 1 *to be completed within first 8 weeks of employment	In Person (COM-302)	This training is a required training for CMCT Case Managers to prepare them to effectively outreach and engage CMCT clients. Participants will learn why engagement is important in CMCT and how to effectively communicate with clients, establish rapport, and conduct required screenings and assessments. The training introduces the vision and values of CMCT and lays the foundation for other required trainings such as Implicit Bias, Trauma Informed Care, and Case Management. Part 1 focuses on CMCT Core Services, Initial Outreach and Engagement workflow, Preparing for Outreach and Assessment and Screenings.
PHCS-CMCT Outreach & Engagement training Part 2 *to be completed within first 8 weeks of employment	(COM-302b)	Part 2 focuses on Connecting with clients, successful engagement techniques, disenrollment, engagement tasks and practice in ccLink.
PHCS- Goal Documentation: Best Practices	(COM-	This online video is an extension of the PHCS-CMCT Outreach and Engagement training Part 2. It is intended to focus on best practices regarding documentation within Goals.
SBIRT- Course by HealtheKnowledge https://healtheknowledge.org/ *Field-Based Staff Only *to be completed within first 8 weeks of employment	1.5 hour self-paced course	Tip Sheet here: http://isitevm/WPC/Directservices/_layouts/15/WopiFrame2.aspx?sourcedoc=/WPC/Directservices/Shared%20Documents/Services/SBIRT/SBIRT%20Course%20Tip%20Sheet%20-%20Face-to-face%20Staff%20Only.docx&action=default Pre-requisite before Case Management Class: Overview

Case management Series: Overview *to be completed within first 8 weeks of employment*	In person (R&R 201)	Case management is at the core of the work we do in CommunityConnect. Class 1 of the Case Management series will ensure Case Managers have: ◦ A clear understanding of what Case Management is in the context of CMCT ◦ A shared vision for our approach & values with clients, and ◦ An explanation of the CMCT Core Services and your role in providing them to your clients. This class works in concert with Class 2 and Class 3 of the Case Management Series. This class should be taken after the CMCT Outreach & Engagement Training (302/302b).
Case management Series: Managing Client Boundaries *to be completed within first 8 weeks of employment*	(R&R 202)	Training covers trauma informed care, understanding clients' personal experiences and reviews the importance of clear boundaries and self-awareness of the case manager.
Case management Series: Caseload Management *to be completed within first 8 weeks of employment*	(R&R 203)	Training covers trauma informed care, understanding clients' personal experiences and reviews the importance of clear boundaries and self-awareness of the case manager.
Referrals & Linkage Reach Health Leads Training *to be completed within first 8 weeks of employment*	In person	This training prepares participant to use the Health Leads Reach resource database system to identify and find resources for their clients. This training is for approved PHN and CommunityConnect employees.
PHCS-Public Health Overview *should be completed within 6 months of employment*	In person (PHS-101)	The Director of the CCC Public Health Division provides an overview of the Public Health Division in the County. He describes the vision and unique role of public health in addressing the social determinants of health in particular and the health of CCC residents in general. He explains the organizational structure of the County, and where Public Health fits within that structure. He showcases the various programs making up the Public Health Division, from programs shaping policy to those promoting public health practices with individuals and families.
PHCS-Implicit Bias *should be completed within 6 months of employment*	In person (CLTC-101)	Studies have found that addressing our associations and biases can improve patient relationships, compliance and outcomes. Additionally addressing our biases can lead to improved satisfaction with our work relationships and our jobs. In this interactive course participants will help you bring the best you into your patient interactions, into your diverse relationships and help us all create a truly healing environment.
PHCS-Trauma Informed Care *should be completed within 6 months of employment*	In person (CLTC-102)	The training focuses on our six trauma-informed principles: 1. Understanding Trauma and Stress 2. Cultural Humility and Responsiveness 3. Safety and Stability 4. Compassion and Dependability 5. Collaboration and Empowerment 6. Resilience and recovery By creating a shared understanding and language to address stress and trauma, organizations are then better able to serve consumers and support the workforce and begin to move away from blame towards compassion.
PHCS-Bay Area Legal-Legal issue spotting and referral workflow *should be completed within 6 months of employment*	Online class (R&R-109)	This training class focuses on identifying legal needs your clients may be experiencing and how to appropriately make a referral to Bay Area Legal Aid to assist your client. This training consists of details on Bay Area Legal Aid's services, the CMCT service contract with Bay Area Legal Aid, how to spot a legal issue versus

		a life issue, how to refer clients, and what documenting the referral and patients goal in ccLink will look like.
PHCS- Housing Law 101 *should be completed within 6 months of employement"	Online	This training class focuses on identifying Housing issues that our clients be be experiencing and how to appropriately support and refer to the resources available.
PHCS-Introduction to Motivational Interviewing-Sessions -offered at least 2x a year *should be completed within 6 months of employment	In person (COM-101a) (COM-101b) (COM-101c) (COM-101d)	MI is a client-centered approach for enhancing motivation to maintain healthy behaviors, introduce harm reduction activities and/or encourage a change in behavior. This training will teach providers: How to build confidence, reduce ambivalence and increase motivation for client adherence to an agreed upon plan for improved health and well-being. Registration for the entire three-part series is required to participate.
PHCS-In Home Support Services-IHSS	(OACD-102)	A representative from IHSS shares valuable tips on how to expedite the process of applying for services, the breadth of services that are available, eligibility requirements, and how to access services. The presenter will help participants identify the appropriate resources for oversight of caregivers, including hiring, identifying and quality assurance.