New Staff Training with
Experienced Case Managers Checklist

Training Instructions:

- ***New Staff:***
  - *you will be doing a section (or portions of sections) individually or with an experience CHW.*
  - *Check off your list if you feel you understand what you have been taught*

- ***Experience CHWs:***
  - *You will teach the person you are training each item assigned on their schedule*
  - *Do the action first (so they can observe), then teach how to… (for every bullet that states what the new staff should learn)*
  - *You will also be responsible for checking off their list items you have trained them on (only when you think they are ready to move to the next sections of training)*

☐ **Preparing for Telephonic Case Management General Checklist Completed**	
Section #1	☐ Read Section 1 in your Training Binder
	✚ Review w/ your supervisor: PHCS & CMCT Program Policies
	☐ Learned/re-cap of navigating HealthLeads/Reach
	☐ Learned about the resource table
	✚ Learn about which resources are used most prominently (in general)
	☐ Learned how other staff set-up their work space
	☐ Learned Set-up your CCLink Navigation Tabs
	☐ Learned how to use appointment books to keep track of appointments
	☐ Learned about the MyCClink Workque
	✚ Go over all the columns and why they are useful
	✚ Go over how to use the filters to narrow down all the columns
	✚ Go over how to use the Workque to view scheduled appointments
	☐ Learned about the Caseload Management Tool / Dashboard
	☐ Learned how to access & utilize Wiki & the CHW Team Page
	☐ Review & Learned the CMCT Telephonic Caseload Management Job Aids " High…Low Priority Task"
	▪ This is located after Core Services in your Training Manual
	▪ **Best Practice: Go to the CHW Team Page, Print out & keep at desk for quick reference**
	☐ Review & Learn the CMCT Telephonic Caseload Management Job Aids "Production Goals & Expectations"
☐ Outreach & Engagement Phase (Completed) - Reference Section 1 & 2 in Training Binder	
Section #1	☐ Review/Read Sections 1 & 2 of Binder
	☐ Learn the steps to prepare for a call
	✚ Learn how to do a chart review (what things to look for)

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	- Learn about SNAPSHOT (Ambulatory & CMCT)
	- Learn about the demographic section
	- Learn how to see if patient's MyChart(MyCClink) is activated
	    ▪ Learn about MyCCLink activation process
	☐ "First Call Script" – Practice #1 (Learning the script only)
	    - Focus on learning the first call script only
	    - Roleplay first call script w/ trainer
	☐ "First Call Script & First Call Workflow" – Practice #2
	    - Review the first call workflow and practice getting familiar in CCLink Play Environment
	    - Learn how to create an encounter
	    - Learn to Create care coordination note
	    - Roleplay the script w/ trainer while doing the workflow in CCLink Play Environment
	☐ "First Call Voicemail Script – Practice #1

Section #2	☐ Learn the Outreach & Engagement Workflow
	    - Learn how to document phone call attempts in the encounter
	    - Learn when to send the lack of engagement letter
	    - Learn how to use the "Assess for Disenrollment" tab and how it helps to manage your outreach clients to disenrollment

☐ Active Phase (Completed)	

Section 1	☐ Review / Read Sections 3 &4 of binder
	☐ Communications
	    - Learn workflow how to send CMCT Letters to clients from CClink
	    - Review the "CCLink Letters Index" in the binder or find at the CHW team page
	        ▪ **Best Practice: Print out & keep at desk for quick reference**
	☐ "Follow-Up Script" – Practice #1
	    - Focus on learning the follow-up script
	    - Review the "Social needs screening" laminate to get familiar with the questions
	        ▪ *<u>Spanish-speaker</u>: Review the social needs screening to figure out the best way to ask questions in Spanish, that will get the appropriate responses needed to assist the client*
	    - Roleplay the follow-up call script utilizing the "social needs laminate
	☐ Learn & Practice the "Follow-up Voicemail" Script
	☐ Follow-Up Call Script" – Practice #2
	    - Learn the "Follow-up Call" Workflow and practice in CCLink Play
	    - Roleplay the "Follow up Call" script & workflow in CClink Play
	        ▪ Experience CHWs: Establish some goals for practice in Play

Section 2	☐ Goals Documentation
	    - Go to Wiki and watch the video on Goals Documentation
	    - Review the "Goal Template Names, Corresponding Dot Phrases…" document (The chart with all the goals & .dotphrases
	        ▪ **Best Practice: Print out and keep for quick reference**
	☐ Learn how retrieve & send resources to clients

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	☐ Learn all the steps for opening and closing/signing an encounter ➕ Reference the Creating an Encounter Reminder Checklist

Section 3	☐ Learn how to use the interpreter line
	    ➕ Read/Review using the interpreter workflow
	    ➕ Learn how to use the phone for 3-way calling
	    ➕ Learn how best use the interpreter to communicate with your client
	        ▪ Give the interpreter an introduction: your name, the program, an a little about the program, and what you would like him to say to introduce you to the client
	            ○ *Do this with the interpreter before making the call to the client*
	            ○ *Learn how to prepare for all your language calls to be done since you have the interpreter on the phone with you*
	☐ Learn how to conduct the High Risk Notification (HRE) follow-up calls
	    ➕ Read & review the HRE script & workflow
	    ➕ Roleplay the script & workflow in CCLink Play
	☐ Learn the “Client Transfers” Script & Workflow

Section 4	☐ Learn how to conduct Medi-Cal (Client Medi-Cal Eligibility) Follow-ups
	    ➕ Following with clients who Medi-Cal have lapsed
	    ➕ In-basket message from SSPAs
	    ➕ Review the CMCT Letter Index (when to send the appropriate letter)
	☐ Learn how to submit Consults & Transfers Referrals
	☐ Learn about how to access Housing Fund & Cell Phone Referrals for clients
	☐ Learn about all Disenrollment reasons and when to use
	☐ Learn how to make an appointment with clients’ PCP

Section 5	☐ Learn how to conduct Bay Area Legal Referrals
	☐ Learn when to conduct the Columbia Suicide Screening
	☐ Learn how provide transportation to clients
	    ➕ Setting clients up with CCHP Transportation
	    ➕ when to use share ride: lyft, taxis, bus tickets

☐ Maintenance & Discharge Phase (Completed)	
Section 1	☐ Review / Read Sections 5 of binder ☐ Learn the Discharge workflow ☐ Rate your confidence to begin: ________ (1-5, 1 being no confidence, 5 being very confident)

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