

VIEW ONLY



Live Well San Diego

**County of San Diego
Behavioral Health Services**



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This handout contains screen shots of confidential and proprietary information for view only. It shall not be copied or shared for anything other than its intended purpose as a training device for the County of San Diego, Mental Health management Information System.



CONFIDENTIALITY

HIPAA regulations mandate that all client information be treated confidentially.

Access to CCBH is based on your position and your job classification. You will have the access you need to complete your job duties. This can include access to clients in your Unit/SubUnit or may include full client look up. Remember – with more access comes greater responsibility regarding confidentiality!

You are not to share passwords with other staff. The Summary of Policy you signed before receiving your access to CCBH included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

The MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to, and may include termination.

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. “Surfing” clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your paperwork quickly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.

Play it safe – keep in mind how you would want your own PHI handled!





CCBH SOFTWARE BASICS

- CCBH IS ACCESSED THROUGH CITRIX (Cerner):
Go to <https://cosdca.cernerworks.com>
- “TAB TO TRAVEL”: Get in the habit of using your “Tab” key. Using the “Tab” assures that you are directed to all required fields and that the information you input is actually captured by the system.
- FILTERS/RADIO BUTTONS: Check these first and make sure they are on “all” when searching the database.
- MAGNIFYING GLASS/ELLIPSES “BUTTONS”: When you see these at the end of a field, it means there is a “Search Screen” that you can pull up to find information for that field. You do not have to use them, but they are there if you need them.
- REQUIRED FIELDS are in red or blue: They must be filled-in to save and final approve information.
- OPTIONAL FIELDS are in white: Information may be added, but is not required to final approve the Assessment. ***Keep in mind – just because you have completed all the fields required to final approve the form, does not mean you have completed a thorough clinical assessment.*** Documentation standards have not changed.
- CLOSED FIELDS are in gray: Nothing can be added in these fields.
- CASE SENSITIVE:
 - o Passwords – if you receive an error message for “Invalid Password”, check to make sure you are using the appropriate upper and lower case letters when typing. After a third attempt with an invalid password, the system will lock your session and will require contacting the Optum Support Desk (1-800-834-3792) to unlock it.
 - o Table Searches – when searching within a table, be aware that descriptions or IDs are case sensitive. If you do not use the correct upper or upper and lower case entry, the search will not take you to the desired table value.
- MULTIPLE WAYS TO ACCESS INFORMATION: In CCBH, it is easy to access the same information in multiple ways. We have included screenshots and directions in this document to guide you through the system.
- LOCKING YOUR SESSION: For security purposes, you must lock your session any time you step away from your computer. This packet explains the various ways to lock your session.



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- WHEN YOU GO BACK TO YOUR PROGRAM: You are learning how to enter assessments in the “**SDC Train CCBH**” environment during this training, which is for **practice purposes only**. It is important to enter all of your assessment information in the “**SDC Live CCBH**” environment when you return to your program.
- For password resets/menu issues: Call the Optum Support Desk. You may also call if you need your “SDC Live CCBH” environment password or menu set up. Their contact information is:

Optum Support Desk
1-800-834-3792

Reminder:

Menu access is set according to job title/functions. The menus you have at your program may look different than menus shown in the screen shots in this packet.



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CCBH SPEAK

Assessment	In CCBH, anything that is not a Client Plan or a Progress Note is considered an "Assessment." So, in CCBH Speak, forms such as the Discharge Summary, Outcome Forms, and Demographic Form are considered "Assessments" as well as the actual clinical assessment forms.
Assignment	Opening/Closing a client to a specific program (Unit/SubUnit/s) and to a specific server.
Clinician's Homepage	A "page" that provides the Clinical servers at each open assignment to view client/s and client information for the identified caseload in one screen. This includes client look up, caseload listing, appointments, task/s to do, notifications, and other client information present in the EHR.
Collateral Server	Co-Staff providing a service (i.e. co-facilitator). Used when more than one staff is providing a service to the same client, on the same date and at the same time as server.
Demographic	A client is entered into the EHR by the completion and final approval of the demographic form. A client may not be opened to assignment/program unless the demographic form is entered, completed, and final approved.
Final Approve	Locks the completed assessment. Prevents editing/deletion of assessments.
SAI – Single Accountable Individual	Primary server identified based on primary unit program set up. This staff will be listed as the primary contact for the client in the system of care for purposes of coordination of care.
Scheduler	A program within the EHR that allows for scheduling of client service events and ongoing appointment/s. This information will populate to the Clinician's Homepage once entered into the EHR through the Scheduler menu.
Service Code	Procedure Code. The code data entered into the EHR for the purpose of claiming a service activity.
Server	Staff providing a service activity.
Unit	The Physical Location of a program, or legal entity.
Sub-Unit	The specialized set of services offered within a Unit (i.e. population, funding sources, etc.).



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PASSWORD CHANGES

Citrix (Cerner) Password

The first Citrix (Cerner) password you ever receive is considered a temporary password. For security reasons, you will be prompted to change your password on your first log in. To do so after the initial login, click “Change Password” when first logging in to Citrix (Cerner).

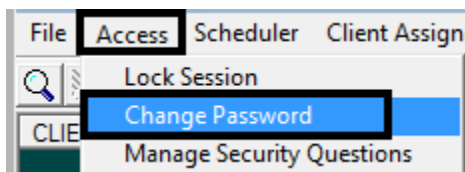


Next, follow the prompts to change your password.

CCBH Password

You are prompted by the system to change your CCBH password every 90 days. However, if you feel that someone has learned your password, for security reasons you should change it immediately. There are two ways to do this:

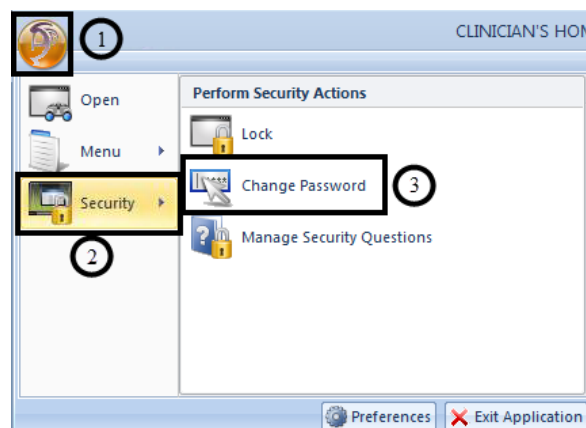
External View



From the External View, go to the “Access” tab and select the “Change Password” option. Follow the prompts to change your password.

Clinician's Homepage

From the Clinician's Homepage, go to the System Button. Select the “Security” menu, and then select the “Change Password” option. Follow the prompts to change your password.





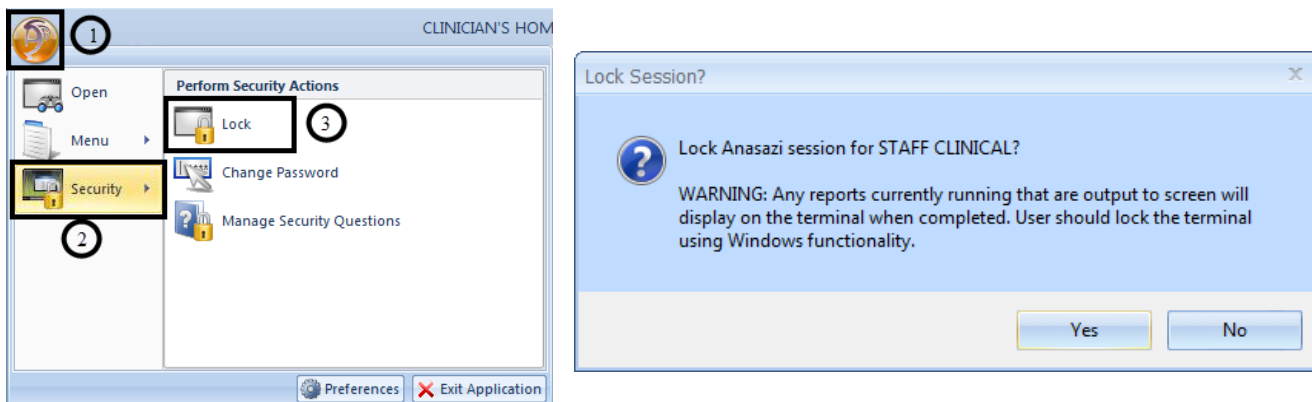
View Only

LOCK CCBH SESSION

For security reasons, the expectation is that you will lock your CCBH session any time you step away from your computer. There are two ways to do this.

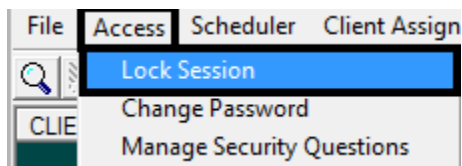
Clinician's Homepage

From the Clinician's Homepage, go to the "Systems Button" and select the "Security" drop down menu, then select "Lock Session" button.

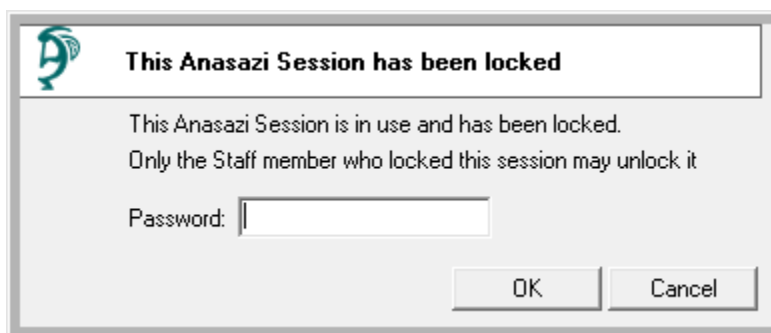


External View

From the External View, go to the "Access" tab and select the "Lock Session" option.



You will be prompted to enter your password to unlock the session.





EXITING APPLICATION

To make sure you do not accidentally create a “ghost session” and lock yourself out of accessing CCBH, you must exit in the following manner:

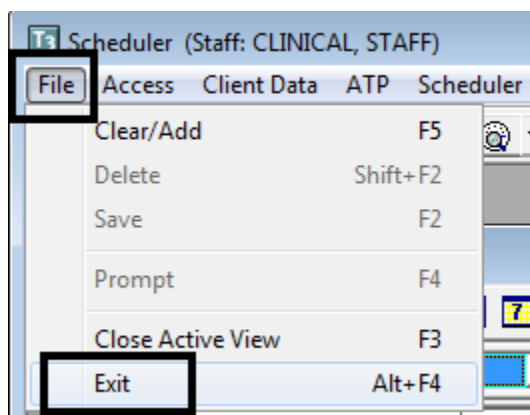
Clinician's Homepage

- o Go to the “Systems Button” menu in the top left-hand corner of your screen.
- o Select “Exit Application”.



External View

- o From the External View, go to the “File” tab and select the “Exit”.



You risk being locked out of CCBH if you do not exit in the manner described above!



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CLINICIAN'S HOMEPAGE TERMINOLOGY

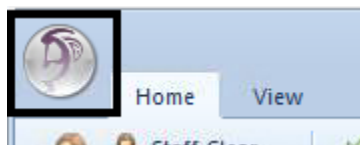
Identifying Terms Used on the Clinician's Homepage

Clinician's Homepage:

The Clinician's Homepage is a real-time tool that provides up-to-the-minute client status at a glance.

Systems Button:

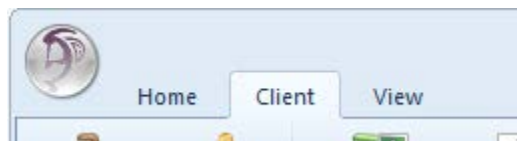
The "Systems Button" acts as the "file" menu. It can be used to exit the application, set preferences, access the external view, or see recently opened views.



Tabs:

The "Tabs" listed below are displayed at the top of the Clinician's Homepage.

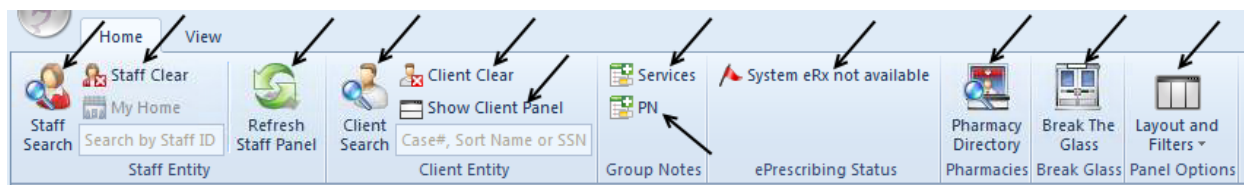
- There are three tabs: "Home", "Client", and "View."



Note: The "Client" tab will only be available if a client has been selected.

Buttons:

- The "Buttons" are individual selections that can be clicked on to perform various functions.

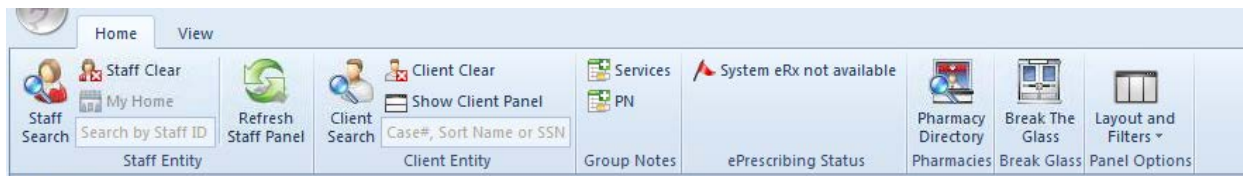




View Only

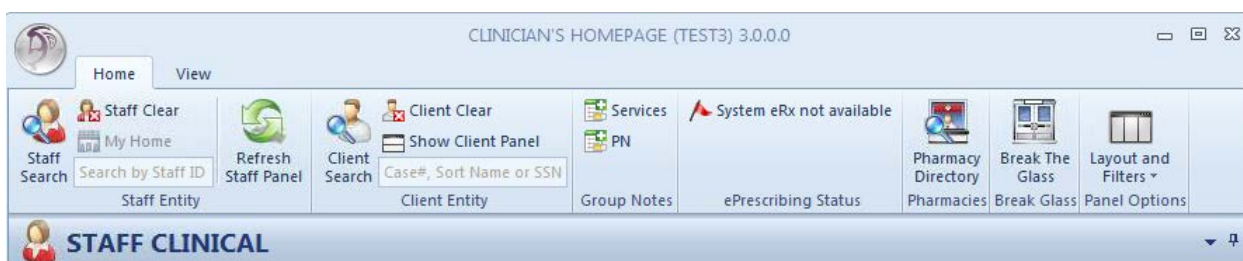
Ribbon:

- The “Ribbon” is an object that is comprised of various buttons.



Staff Panel:

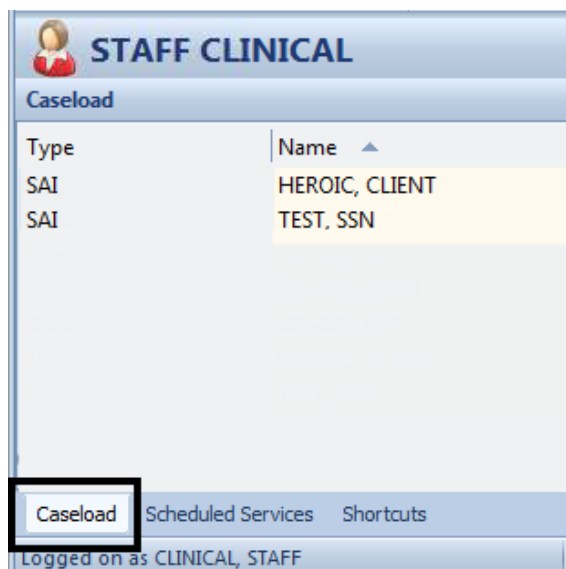
The Staff Panel automatically launches when the Clinician's Homepage is opened.



You will see your name as well as your job title listed. If you believe that the job title is incorrect, you must complete a new ARF form and submit it to the MH MIS Unit for correction.

Caseload:

The Staff Panel defaults to show your caseload. These are the clients who have been assigned to you. You can always return to your caseload by selecting the Caseload pane at the bottom of the screen:



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Identifying Client Type:

You can find the client designation under the “Type” heading on the “Caseload” pane of the staff panel. There are three client types that may appear on your caseload:

Type	Name ▲
SAI	FAKE, TEST
SAI	CLIENT, FAKE
Caseload	DEER, RAIN
SAI	FAN, CEILING
Pre-Intake	KITE, FLYING

- **SAI:** this signifies that you are the Single Accountable Individual for the client listed.
- **Caseload:** this indicates that, in addition to your program, the client is being seen at another program. You are not the SAI for this client type – the other program staff would be the SAI.
- **Pre-Intake:** this indicates that the client is temporarily on your caseload as a pre-intake client. Pre-intake is intended for the purpose of allowing brief access by a clinician to the Client Chart for the process of screening before the client is assigned to a Unit/SubUnit.



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Scheduled Services:

Any clients displayed in this pane are scheduled for service events that calendar day. You can always return to this pane by selecting the Scheduled Services pane tab at the bottom of the window.

Client Panel:

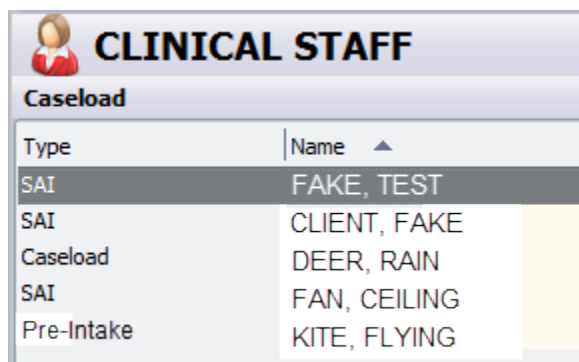
- The “Client Panel” displays information about the client that you selected. The “Client Panel” consists of “Client Panes”. You may access the information contained in those panes by clicking on each pane.



CLIENT SEARCH

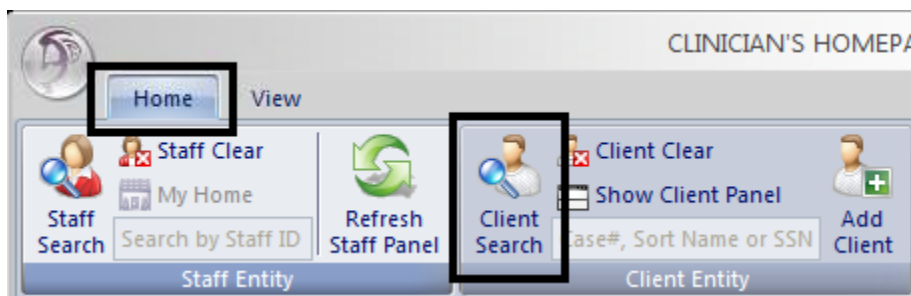
Searching for a Client Who Is In Your Caseload:

- On the Clinician's Homepage "Home" tab, under "Caseload", double click on the name of the client.
- This action opens up the "Client Panel" where you can find information about your client.



Searching for a Client Who Is Not In Your Caseload:

- o Select the "Client Search" button



- o The "Client Lookup" window will open

Click on the search button to perform a search for client records based on the criteria in the top section.

Client Search

Client Search Parameters

Case #	0	Sort Name		Search
Last		First		DOB /
Alias Last		First		Sex -
				SSN

Client Search Results

Name	First	Last	Case#	S...	Eth...	DOB	SSN	Prim Unit ID	Prim Uni...	Prim SubUn...	Prim SubU...	External ...	SAI ID	SAI N...
There are no items to show.														



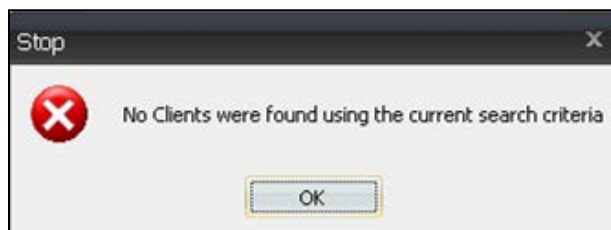
View Only

There are several different ways to search for a client from this window:

- By “Sort Name”: Enter the client’s sort name in the LAST NAME, FIRST NAME format, then select the “Search” button. (The “Sort Name” is the client’s name as formatted when first entered into the CCBH system):

- If the Sort Name you’ve entered is in the system, it will be displayed in the “Client Search Results” area, as in this screen shot which exemplifies a search done for fictional client sort name, “PIE, APPLE”:

- If the Sort Name you entered is not in the system, you will receive the following stop message:



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- This does not mean that the client is not in CCBH. Rather, you may not have entered the sort name exactly as it was formatted when the client's information was first entered into the CCBH system. For this reason, you should search by other criteria such as:



Note: Before beginning another type of search, select the "Clear" button to reset the search criteria.

Clear

- In client search, enter LAST NAME, FIRST NAME, date of birth (check spelling and in ALL CAPS).
 - If client is found with that name, double check SSN.
- Search by SSN.
- Search by Alias.
 - If match found, open the Demographic form on client and double check DOB, address, SSN.
 - Check 3rd Party information to see if client has the same Medi-Cal (BIC, CIN) number.
- If it is unclear which is the first name or the last name, enter the other position of names in Alias – e.g., Bubble Gum entered into CCI as GUM, BUBBLE may be entered into Alias as BUBBLE, GUM.



Note: When searching use all capital letters, these fields are case sensitive.

- You can now search by one or more of the other criteria fields (Last, First, DOB, Alias Last, First, Sex, Case Number). Select the "Search" button.



Note: If you search by data that is common in the system (such as conducting a search only by a common first name) you will receive the following warning screen. This allows you the option to either continue with or cancel the search.

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Additional Client Search Feature

- The “Thru” field, in conjunction with the “DOB” field allows you to search for clients within a particular date range. For example, if the DOB is approximately 3/10/1964 and you enter 3/08/1964 in the “DOB” field and 3/12/1964 in the “Thru” field, all clients in the system who have that dates of birth in that date range will be displayed in the “Client Search Results” window.



*Note: If the exact DOB is known ~ enter it in the ‘DOB’ **and** ‘Thru’ fields to find clients born only on that date.*

Click on the search button to perform a search for client records based on the criteria in the top section.

Client Search

Client Search Parameters

Case #	01	Sort Name		Search
Last		First		Default
Alias Last		First		Clear
		DOB	/ /	Thru / /
		Sex	-	SSN ___-___-___

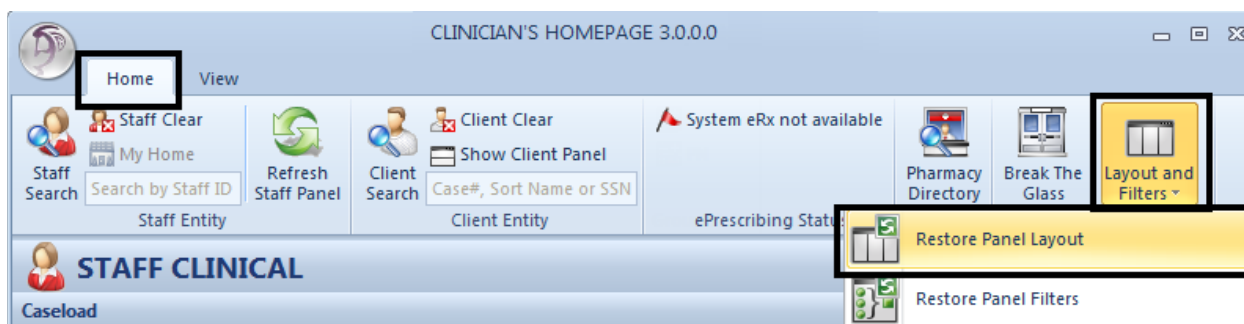
NOTES



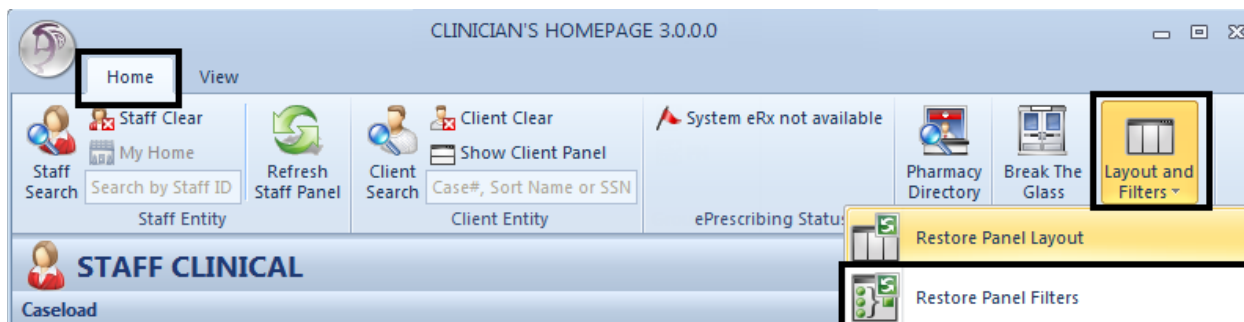
View Only

RESTORE SYSTEM DEFAULTS

If the layout becomes distorted, or the panes have *disappeared*, select “Restore Panel Layout” (under the Layout and Filters button on the Home tab). This will restore the layout to what it was when you first logged in.



Select “Restore Panel Filters” (under the Layout and Filters button on the Home tab) to bring all the Filters back to their default settings, if desired.



NOTES



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CLIENT FACE SHEET

The Client Face Sheet will allow users to view any entered information from the client's most recent final approved Safety Alert, Demographic Form, and Diagnosis Form. The Client Face Sheet displays the Primary Unit, SubUnit and SAI for the client. If the client information has not been entered on one of these forms, the corresponding information fields on the Face Sheet will be blank.

- After accessing a client, the Client Face Sheet can be viewed by clicking the "Face Sheet" pane in the client panel.

- The Client's Face Sheet cannot be edited from this view. To print click on the drop down arrow at the top right, and click "Print Face Sheet".



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VIEWING ASSESSMENTS

- Select a client and open the “Client Panel”.
- Next, click the “Assessments” pane.
- A list of assessments will display. The assessments that are final approved will have a check under the Final approved status (F/A).
- Double click the assessment. The selected assessment will open in show mode.

FAKE TEST		F/A	LK	V
Date	Description			
07/01/2015	Demographics Form			
07/01/2015	Diagnosis Form	☒		

NOTES



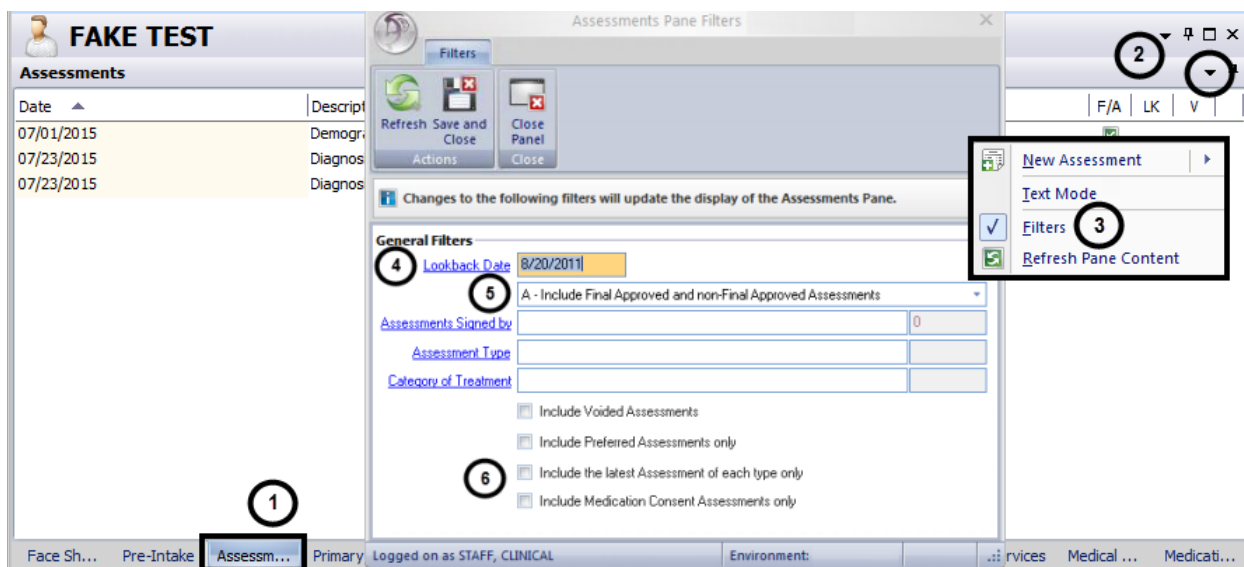
View Only

FILTER SETTINGS

Modifying filter settings to display historical assessments

Each user may personalize the way filters display information in his or her Clinician's Homepage. Any time you do not see the desired information, the first step is to check the filters to assure the correct parameters are selected for your search.

1. On the "Client Panel", click on the "Assessments" pane. The "Assessments" pane will open an expanded window.
2. Click the drop down arrow  on the "Assessments" bar that displays on the right.
3. A new window will display. Click on the check mark  or on the word "Filters".
4. The "Filters" window will display. There are three areas where you can make changes: Lookback Date: This date pre-populates back 48 months from the date you open the filter. If a desired assessment is before the date listed, and is not displaying on the "Assessments" tab; you can adjust the date manually.
5. From the drop down menu, you may choose A: "Include Final Approved and non-Final Approved Assessments", F: "Include Final Approved Assessments only" or N-"Include non-Final Approved Assessments only".
6. You may also place a checkmark by the "Include the latest Assessment of each type only" choice given.



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Filters in Clinician's Homepage:

Several panes located within the Client Panel contain "Filters". Below are some examples:

Assignments Pane Filters: *updates the Assignments Pane to display Opened and Closed Assignments.*

The screenshot shows the "Assignments Pane Filters" dialog box. It has a title bar with a logo and a close button. Below the title bar is a "Filters" tab. Under the tab are three icons: a green circular arrow for "Refresh", a floppy disk for "Save and Close", and a window with a red X for "Close Panel" and "Close". Below these icons is a message: "Changes to the following filters will update the display of the Assignments Pane." Underneath is a section titled "General Filters" with a dropdown menu showing "A - Include Open and Closed Assignments". Below the dropdown are three checkboxes: "A - Include Open and Closed Assignments", "C - Include Closed Assignments Only", and "D - Include Open Assignments Only". At the bottom, a note states: "This filter does not apply when the Assignments Pane is collapsed".

Services Pane Filter(s): updates the display of the Services Pane. The date field filters for services on or after the date entered. Check boxes further filter that data, for particular service types or services by specified staff, for example.

The screenshot shows the "Service Pane Filters" dialog box. It has a title bar with a logo and a close button. Below the title bar is a "Filters" tab. Under the tab are three icons: a green circular arrow for "Refresh", a floppy disk for "Save and Close", and a window with a red X for "Close Panel" and "Close". Below these icons is a message: "Changes to the following filters will update the display of the Services Pane." Underneath is a section titled "Service Filters" with a "Lookback Date" field set to "6/2/2013". Below the date field are two checkboxes: "Include Crisis Services, Cancellations, and No Shows only" and "Include Services with the Selected Staff only". Below this is a section titled "Progress Note Filters" with three dropdown menus: "A - Include Services with and without Progress Notes", "A - Include Services with Final Approved and Pending Progress Notes", and "A - Include Services with Planned and Unplanned Progress Notes". At the bottom, there is a "Client Plan Type" field.



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VIEWING CLIENT ASSIGNMENTS

Clinician's Homepage

Client "Assignments" refer to where the client has received, or is currently receiving, services. In the "Clinician's Homepage" you can view the Opening/Closing dates when a client was assigned to a specific program (Unit/SubUnit/s) and to a specific server.

- A. In the "Client Panel" click on the "Assignments" pane.
- B. It displays all the assignments attached to the client.

FAKE TEST								
Assignments								
Pm	Opened	Closed	Unit ID	Unit Name	SubUnit ID	SubUnit Name	Primary Serv...	Primary Server Name
✓	01/01/2015		9900	TRAINING UNIT	9901	TRAINING SUBUNIT	800009	STAFF, CLINICAL
	03/05/2015		1000	FAKE UNIT	1001	FAKE SUBUNIT		STAFF, FAKE

Face Sheet Pre-Intake Assessments **Assignments** Primary Diagnosis - ... Primary Substance Abuse Current Client Plan Progress Notes Authorizations Primary Insurance

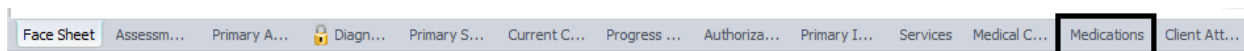


View Only

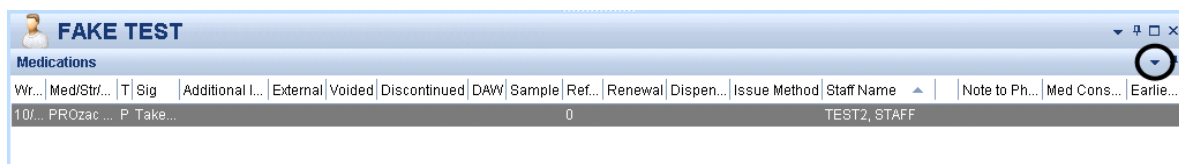
PRINTING CLIENT MEDICATIONS

A list of the client's medications can be printed from the Medications Pane.

- With the Client panel open, select the “Medications” pane at the bottom of the screen.



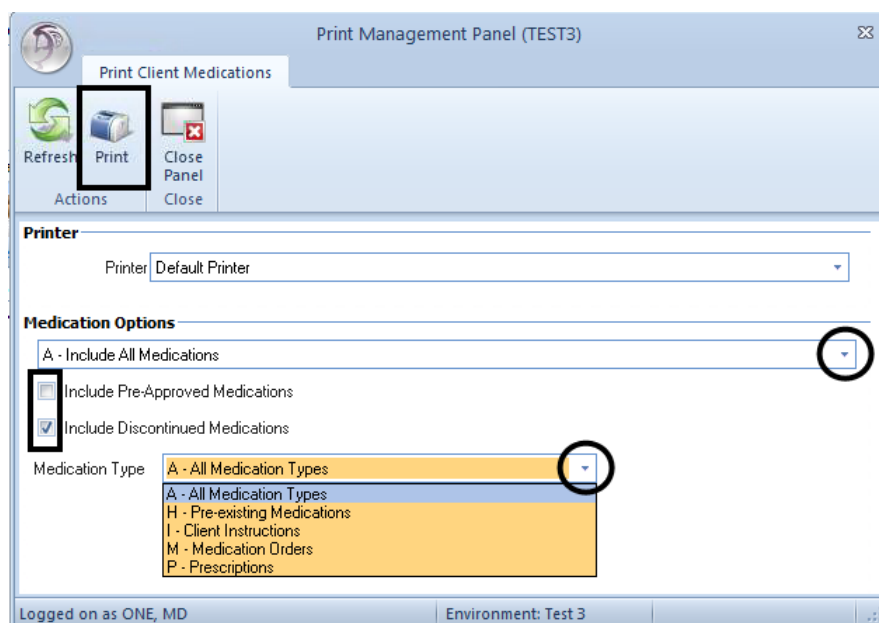
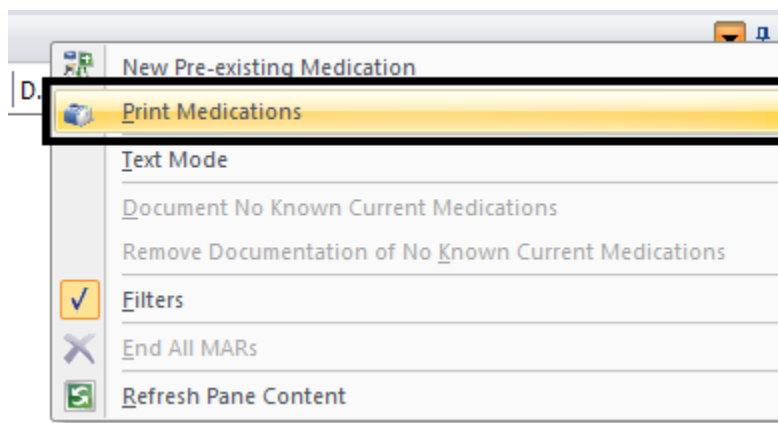
- On the right top portion of the Client panel, select the down arrow.



- A drop down menu will launch. Select the “Print Medications” option.



Note: This menu will also appear when right clicking in the white space within the client panel.



- Adjust the printing options to what is needed. Users can choose to print only a certain medication type, to include pre-approved or discontinued medications, and/or to include all medications or only current medications.

- When finished adjusting the filters, select “Print.”



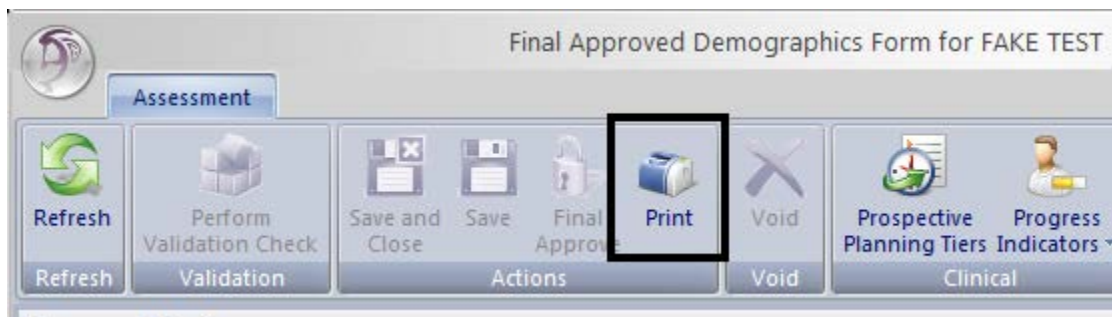
View Only

PRINT TO SCREEN

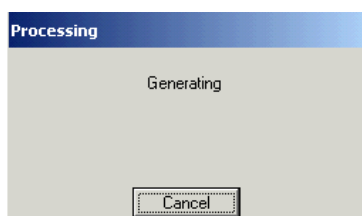
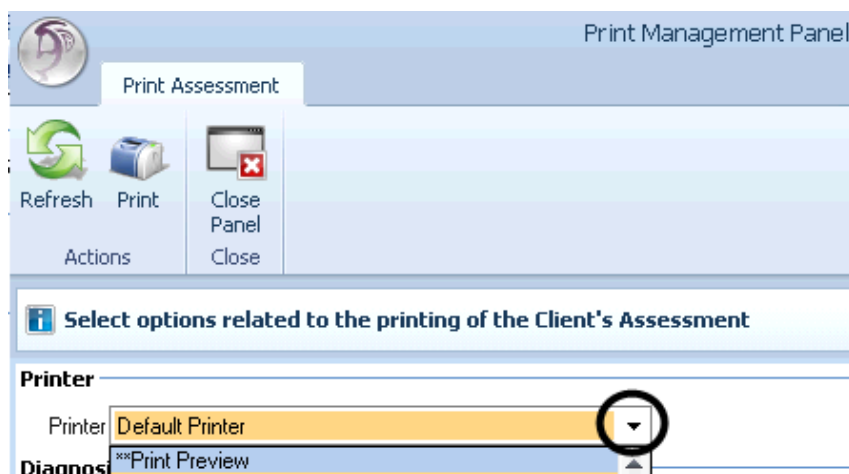


Note: Before printing a hard copy, always print to screen first to verify whether printing is truly necessary.

- Click the “Print” button.



- Click on the down arrow to the right of the “Printer” field, click “Print Preview”, and click the “Print” button.



It will take a few moments to process the command. Wait until the following message disappears.

A copy displays on the screen. Pay attention to the total number of pages before deciding to print a physical copy.

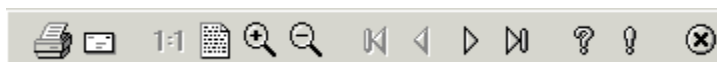


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Name: LAST, FIRST MIDDLE	Case#:	Page: 1 of 2
Type:		Date:
Printed on 03/01/2010 at 9:13 am.		Print

Icons

You will find icons across the top of the print screen which will allow navigation through the copy.



Prints a physical copy.



Emails a copy. **DO NOT** use this feature, as it is a breach in confidentiality.



Displays the default size of the copy.



Shrinks the copy down to 25% of the default size.



Zooms in by 50% each time the icon is clicked.



Zooms out by 25% each time the icon is clicked.



Navigates directly to the first page.



Navigates back one page.



Navigates forward one page.



Navigates directly to the last page.



Displays keyboard commands for navigating through the copy.



Displays the details of the software product.

- Closes out of "Print to Screen" and returns to the original view.

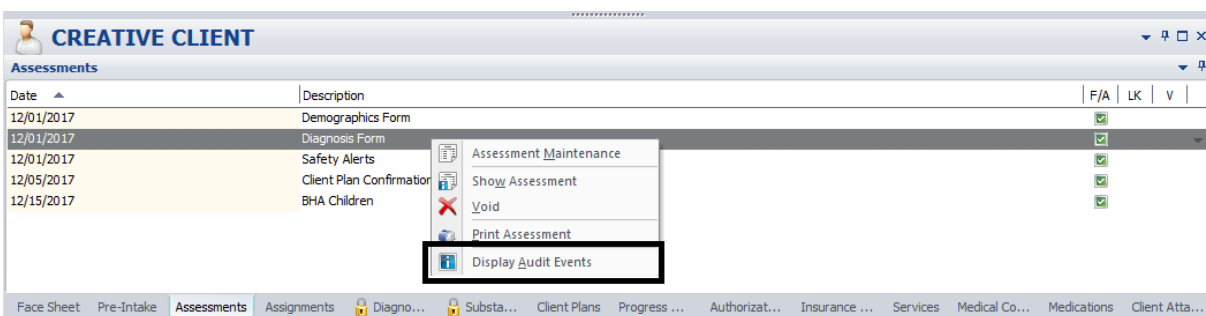


View Only

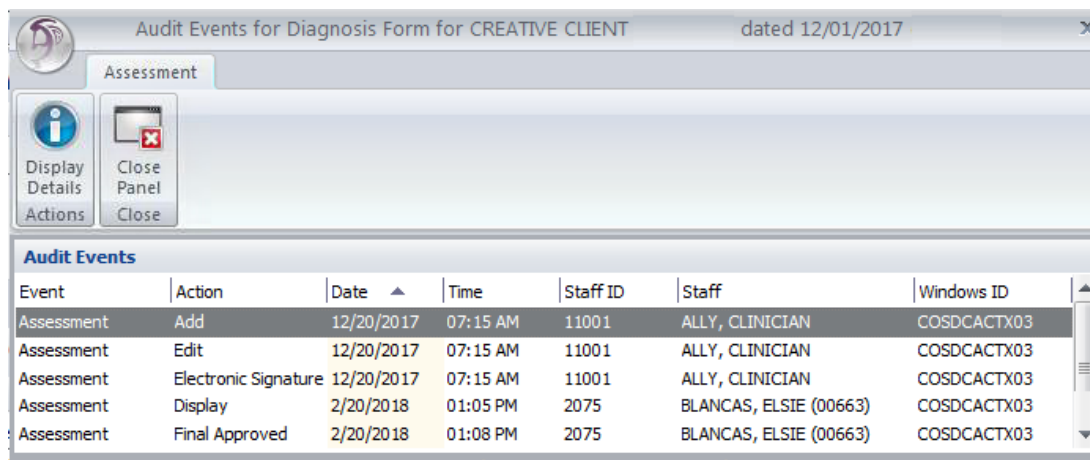
DISPLAY AUDIT EVENTS

To see when an assessment was added, edited, final approved, viewed, or printed, utilize Display Audit Events. Display Audit Events will display who touched the assessment, when, and what action was completed.

1. Right click on the assessment details you wish to view. Select “Display Audit Events.”



2. Each column in the window that appears can be sorted by clicking on the column header. The window will display a line for each separate action a staff takes (add, edit, sign, final approve, display, and print).



3. Select “Close Panel” to return to the Assessments Pane.



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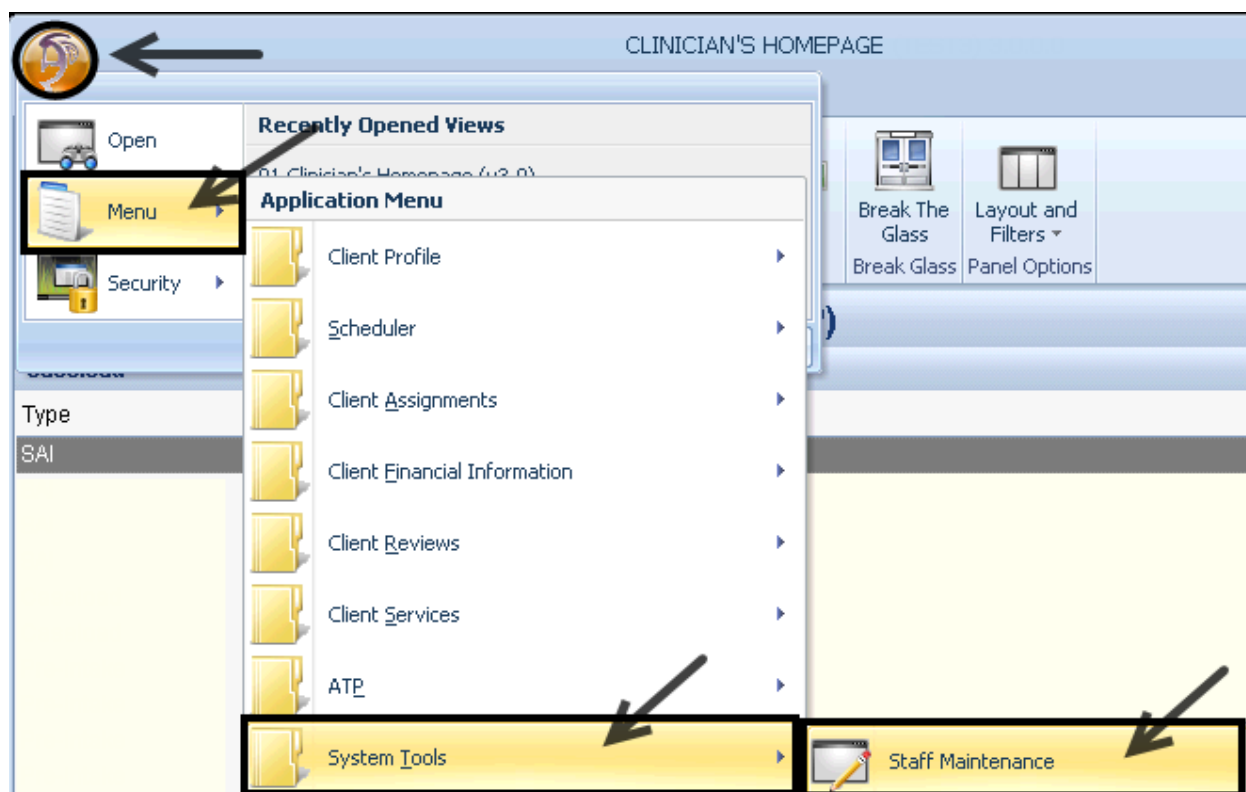


View Only

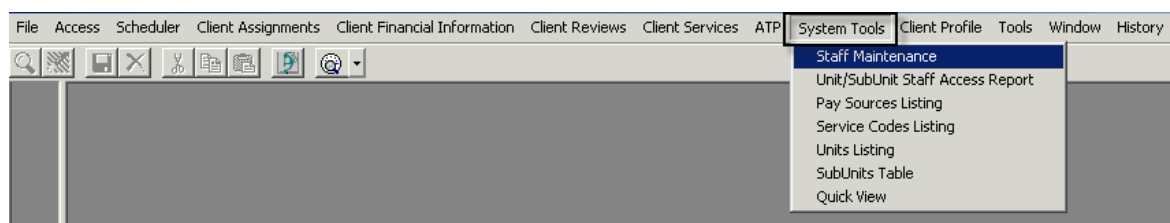
STAFF MAINTENANCE LOOKUP

How to Lookup a Staff for Contact Information

- From the CLINICIAN'S HOMEPAGE, click the Systems Button, click "Menu", click "System Tools", and click "Staff Maintenance".



- From the EXTERNAL VIEW, locate "Staff Maintenance" under "System Tools".





View Only

“Staff Maintenance” Menu:

When the “Staff Maintenance” Menu launches, your staff ID and name will be highlighted in blue as a default. Your current contact information on file will be listed in the “Main (1)” tab below.

ID	Sort Name	Center Phone
98888	ASO CLINICAL, STAFF	
99999	ASO ATTENDING, STAFF	
114503	TEST, COT1	
114504	TEST, COT2	
114505	TEST, COT3	
114507	TEST, COT4	
114508	TEST, COT5	
114509	TEST, COT6	
114510	TEST, COT10	
115000	TEST, TEST	

Options: Main, Administrator, Options, Unit/SubUnit Access, Credentials, Languages, Meaningful Use, DR Prescription Information

Currently Viewing Information for Main

Staff ID: 98888, Sort Name: ASO CLINICAL, STAFF, First Name: STAFF, Middle Name: , Last Name: ASO CLINICAL, Social Security Number: , Internal Phone: , Email Address:

Buttons: Save, Delete, Restore, Find, Clear, Exit

To begin your search:

- Press the “Find” button at the bottom of the window.
- The “Search: Sort Name” box will launch.

NOTE: You may search by “ID” or “Sort Name” by clicking under the desired column before pressing “Find”. A red dotted box will display under the field you are searching.

ID	Sort Name	Center Phone
1	CLINICIAN, AWESOME	(819) 555-5555
2	CLINICIAN, AMAZING	(819) 555-5555
3	CLINICIAN, FANTASTIC	(819) 555-5555
4	CLINICIAN, SUPERB	(819) 555-5555
5	CLINICIAN, TEST	(819) 555-5555
6	CLINICIAN, MAGICAL	(819) 555-5555
7	CLINICIAN, EXTRAORDINAIRE	(819) 555-5555
8	CLINICIAN, INCREDIBLE	(819) 555-5555
9	CLINICIAN, WONDERFUL	(819) 555-5555
10	CLINICIAN, MAGNIFICENT	(819) 555-5555

ID	Sort Name	Center Phone
1	CLINICIAN, AWESOME	(819) 555-5555
2	CLINICIAN, AMAZING	(819) 555-5555
3	CLINICIAN, FANTASTIC	(819) 555-5555
4	CLINICIAN, SUPERB	(819) 555-5555
5	CLINICIAN, TEST	(819) 555-5555
6	CLINICIAN, MAGICAL	(819) 555-5555
7	CLINICIAN, EXTRAORDINAIRE	(819) 555-5555
8	CLINICIAN, INCREDIBLE	(819) 555-5555
9	CLINICIAN, WONDERFUL	(819) 555-5555
10	CLINICIAN, MAGNIFICENT	(819) 555-5555



View Only

Search Window:

Search: Sort Name

CLINICAL, STAFF

OK

- Type in the desired name of the staff you wish to find.

NOTE: The format must be last name, comma, then SPACE, and first name. For example, "CLINICAL, STAFF" would be the proper format.

12047 CLINICAL, STAFF

Options

Main

Currently Viewing Information for Main

Staff ID: 12047

Sort Name: CLINICAL, STAFF

First Name: STAFF

Middle Name:

Last Name: CLINICAL

Social Security Number:

Internal Phone: 858-555-5555

Email Address: CLINICAL123@EMAIL.COM

- The contact information of the staff for which you have entered will display under "Main".
- The "Internal Phone" number as well as the "Email Address" will be listed when it is available.

NOTES



View Only

SCHEDULER

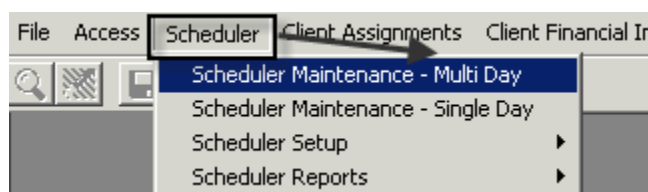
Scheduler is a comprehensive support system that helps clinicians to manage their clients' treatment plans. With the Scheduling System, you have the flexibility to define schedules for clients and clinicians. You can view a schedule over one day, two days, a week, or a month.

The portion contained in this packet is a limited version of how you can use Scheduler. Several Administrative staff have been trained in this part of the software in depth.

There are multiple ways to access Scheduler in CCBH.

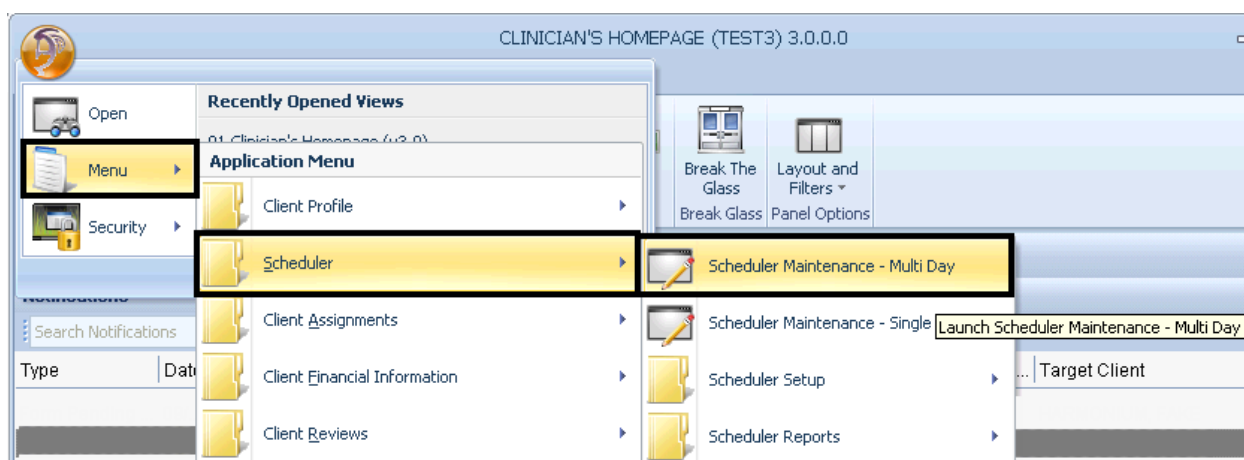
From the External View:

- Click on the “Scheduler” menu.
- A drop down menu will display, select “Scheduler Maintenance- Multi Day”.



From the Clinician's Homepage

- From the “Systems Button”, select “Menu”, then “Scheduler”, then “Scheduler Maintenance - Multi Day”.





- “Entity Type” will default to Staff.

To view a schedule

1. Enter the CCBH ID number in the “Entity” field and press the tab key on the keyboard. NOTE: If you wish to schedule for a client instead of staff, change the “Entity Type” to “Client”, and enter a client case number in the “Entity” field
2. Leave the “Location” field on “All”

NOTES



TRAINING TIP SHEET

1. WHEN YOU GO BACK TO YOUR PROGRAM:

- ☐ You are learning how to enter assessments in the “SDC Train CCBH” environment during this training, which is for **practice purposes only**. It is important to enter all of your assessment information in the “SDC Live CCBH” environment when you return to your program.

2. SUPPORT DESK – IMPORTANT!:

- ☐ Please do not try to solve issues by “working around” the system. You are to enter data as required and you must call the Support Desk for any questions.
- ☐ The Support Desk contact information is:

Optum Support Desk Contact Information

800-834-3792

sdhelpdesk@optum.com

3. FOR ONLINE USER MANUALS AND FORMS: (including forms and form-fill versions of assessments for “emergency” situations) go to the Optum website below and follow these instructions:

<https://www.optumsandiego.com>

- ☐ Click "Register" to get an on-line form for your personal login.
- ☐ Confirm your email address.
- ☐ When you have access, click “Login”.
- ☐ Login with your User Name and Password.
- ☐ Go to "Secure Documents".
- ☐ Select CCBH (formerly Anasazi) Secure Documents
- ☐ Click "Forms" or "Manuals".

4. TO REGISTER FOR ADDITIONAL TRAINING:

www.regpacks.com/Optum

- ### **5. HIPAA REGULATIONS FOR TRAINING:** There is actual client data (names, etc.) in the training environment. HIPAA regulations mandate this information be treated confidentially.
- ### **6. NON-USE OF CCBH ACCOUNT:** Inactive accounts pose a security risk by allowing an opportunity for unauthorized access. Therefore, in order to safeguard protected health information, inactive accounts will be closely monitored. Users who have not used CCBH in 90 days will have their account deactivated.



View Only

Support Desk Contact Information

sdhelpdesk@optum.com
1-800-834-3792

Monday through Friday (E-mail)

Hours	Services
6:00 am to 6:00 pm	All services except password resets or any service involving PHI

Monday through Friday (Telephone)

Hours	Services
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*
6:00 am to 6:00 pm	All services
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

Weekends (Telephone)

Hours	Services
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

* By definition, a system outage affects multiple users. Examples include when:

- The system does not respond and appears to be frozen
- No data can be entered or viewed

Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.
- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.
- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

Additional Contacts

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	www.optumsandiego.com
Service Codes	CCBH (Anasazi) User Manual/QM Unit

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