



Monterey County Behavioral Health

Supervisor/Manager Checklist

EMPLOYEE INFORMATION

Name:	Start date:
Position:	Manager/Supervisor:

NEW HIRE

HUMAN RESOURCES (HR)

Submit "Request for Personnel Action" to HR

AVATAR

Staff who will be claiming for mental health services *require* a National Provider Identifier (NPI) number

Staff has NPI number

<http://www.npinumberlookup.org/> Or <https://nppes.cms.hhs.gov/NPPES/Welcome.do>

Staff has applied for NPI number and is awaiting

<https://nppes.cms.hhs.gov/NPPES/Welcome.do>

Complete Avatar "New User Request" form

<https://www.mtyhd.org/QI/index.php/county-staff/new-staff-procedures/>

Note: Completion of Avatar user access cannot be completed without a NPI number for staff who require a NPI number. However, the new user request may be submitted prior to having a NPI number for initial processing. Once NPI is obtained, please notify 415QA.

HEALTH INFORMATION TECHNOLOGY (IT)

Complete Health Department "Employee on/off Boarding Form"

http://sharepoint/sites/mchd/Admin/infosys/Forms/EMPLOYEE%20ON-OFFBOARD/Emp_OnOffboardingXFR_FRM.pdf

Complete Health Department "County ITD Transfer Request"

http://sharepoint/sites/mchd/Admin/infosys/Forms/EMPLOYEE%20ON-OFFBOARD/CNTY_ITDEmp_XFR_FRM.docx

TRAININGS

Sign up for Avatar training

<https://www.mtyhd.org/QI/index.php/training/>

Sign up for documentation trainings

- Assessment
- Treatment Planning
- Progress Notes

FIRST DAY

- Provide employee with an orientation handbook.
- Assign "buddy" employee(s) to answer general questions and shadow.

POLICIES

<input type="checkbox"/> Review Key Health Department Policies	<ul style="list-style-type: none"> • Anti-harassment • Vacation and sick leave • FMLA/leaves of absence • Holidays • Time and leave reporting • Overtime • Performance reviews • Dress code 	<ul style="list-style-type: none"> • Personal conduct standards • Progressive disciplinary actions • Security • Confidentiality • Safety • Emergency procedures • Visitors • E-mail and Internet use
<input type="checkbox"/> Review All Behavioral Health Policies	<ul style="list-style-type: none"> • http://www.mtyhd.org/QI/ 	<ul style="list-style-type: none"> • Review and sign Monterey County Compliance Plan • https://www.mtyhd.org/QI/wp-content/uploads/2014/09/2105-04-23-Monterey-County-Compliance-Plan.pdf

ADMINISTRATIVE PROCEDURES

<input type="checkbox"/> Review general administrative procedures.	<ul style="list-style-type: none"> • Mail (incoming and outgoing) • Shipping (FedEx, DHL, and UPS) • Business cards • Purchase requests 	<ul style="list-style-type: none"> • Telephones • Building access cards • Conference rooms • Picture ID badges • Expense reports • Office supplies
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INTRODUCTIONS AND TOURS

<input type="checkbox"/> Give introductions to department staff and key personnel during tour.			
<input type="checkbox"/> Tour of facility, including:	<ul style="list-style-type: none"> • Restrooms • Mail rooms • Copy centers • Fax machines 	<ul style="list-style-type: none"> • Bulletin board • Parking • Printers • Office supplies 	<ul style="list-style-type: none"> • Kitchen • Coffee/vending machines • Cafeteria • Emergency exits and supplies

POSITION INFORMATION

- Introductions to team.
- Review initial job assignments and training plans.
- Review job description and performance expectations and standards.
- Review job schedule and hours.
- Review payroll timing, time cards (if applicable), and policies and procedures.

Information Technology (IT)

<input type="checkbox"/> Hardware and software reviews, including:	<ul style="list-style-type: none"> • E-mail • Intranet 	<ul style="list-style-type: none"> • Microsoft Office System • Data on shared drives 	<ul style="list-style-type: none"> • Databases • Internet
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STAFF TRANSFERS

HUMAN RESOURCES (HR)

Submit "Request for Personnel Action" to HR

AVATAR

Complete "Error Reporting" form; select Team Assignment from the drop down menu

HEALTH INFORMATION TECHNOLOGY (IT)

Please submit the forms below to Health IT.
Please contact Health IT at 755-4343 with questions about these forms.

Complete Health Department "Employee on/off Boarding Form"

http://sharepoint/sites/mchd/Admin/infosys/Forms/EMPLOYEE%20ON-OFFBOARD/Emp_OnOffboardingXFR_FRM.pdf

Complete Health Department "County ITD Transfer Request"

http://sharepoint/sites/mchd/Admin/infosys/Forms/EMPLOYEE%20ON-OFFBOARD/CNTY_ITDEmp_XFR_FRM.docx

Note: Initial program will complete page 1 of this document. "New" program completes page 2 of this document. Each program may email the document separately.

END OF EMPLOYMENT

HUMAN RESOURCES (HR)

Submit "Request for Personnel Action" to HR

AVATAR

Complete "End of Employment Bundle"

https://www.mtyhd.org/QI/wp-content/uploads/2015/10/End_of_Employment_bundle_2015-0106.pdf

HEALTH INFORMATON TECHNOLOGY (IT)

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