

Monterey County Behavioral Health Quality Improvement

PROTOCOLS

Re: New Hire and End of Employment			
Policy References:			
Form Reference:	<ul style="list-style-type: none"> New Hire and End of Employment Checklist 	Avatar: <ul style="list-style-type: none"> New Use Request End of Employment Bundle Error Reporting 	Health IT: <ul style="list-style-type: none"> New Hire, Current and Employee Transfer (on/off boarding) User Transfer Request
Date: 10/5/16			

With multiple staff members coming on board, transferring between programs, and/or separating from employment with the Behavioral Health Bureau, it is necessary to have a process in place for Supervisors/Managers to reference in order to ensure the staff members have the necessary tools to perform job responsibilities or to ensure the removal of access to information technology systems, including the electronic health record, Avatar.

Please note there are forms that need to be submitted to Health IT, while Avatar forms are completed in Avatar. Please follow these steps in order to avoid delays.

The “New-Hire and End of Employment” checklist can be found on the QI website:

<https://www.mtyhd.org/QI/wp-content/uploads/2014/09/Updated-New-Employee-Checklist-2016-v2.pdf>

Complete for ALL New-Hire County staff members:

The Health Department is responsible for information technologies that may help with performing job responsibilities such as set up of outlook email accounts, computer log in, user group access, etc. The following documents should be completed as soon as possible in order to avoid delays. Please follow these next steps to request access, transfer, and/or termination of information technology systems (outlook, folders, workstations, etc.)

1. Complete the Health Department [on/off boarding] “New Hire, Current and Employee Transfer” form; submit to Health IT http://sharepoint/sites/mchd/Admin/infosys/Forms/EMPLOYEE%20ON-OFFBOARD/Emp_OnOffboardingXFR_FRM.pdf
2. Complete the Health Department “Transfer Request” form; Submit to Health IT http://sharepoint/sites/mchd/Admin/infosys/Forms/EMPLOYEE%20ON-OFFBOARD/CNTY_ITDEmp_XFR_FRM.docx

Note: Submit this forms to Health IT; for questions concerning the form above, please contact Health IT at 755-4343

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Complete for New-Hire staff members who require access to Avatar:

3. Complete “new user request” form in Avatar <https://www.mtyhd.org/QI/index.php/county-staff/new-staff-procedures/>
 - a. For staff who will claim/bill for mental health services, a National Provider Identifier (NPI) number is required.
 - i. NPI look up: <http://www.npinumberlookup.org/> Or <https://nppes.cms.hhs.gov/NPPES/Welcome.do>
 - ii. Applying for NPI: <https://nppes.cms.hhs.gov/NPPES/Welcome.do>

NOTE: Avatar user account cannot be completed until a NPI is submitted for staff requiring NPI number.

Complete for County Staff *Transferring* to another County Team:

1. Complete “Error Reporting” form in Avatar to end assignment with your team and avoid conflicts with productivity reports.
 - a. Select Team Assignment
 - b. Add information in the Notes section

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Links to Forms

For ALL New Hire and Employee Transfer for County staff members:

Submit form to Health IT.

<http://sharepoint/sites/mchd/Admin/infosys/Forms/Forms/AllItems.aspx?RootFolder=%2Fsites%2Fmchd%2FAdmin%2Finfosys%2FForms%2FEMPLOYEE%20ON%2DOFFBOARD&FolderCTID=0x0120008C31306D39FAE54B99BDBFCD31715325&View={AE9BA538-2618-46E5-91B1-F2D1402A65A0}>

Type	Name	Description	Modified	Modified By	Version
	CNTY_ITDEmp_XFR_FRM	HIT to fill out & submit to County ITD	7/22/2016 7:43 AM	Ravelo, Maritza	0.4
	Emp_OnOffboardingXFR_FRM	Internal form for Mgr.Supv to fill out	7/22/2016 7:43 AM	Ravelo, Maritza	0.2
	OffBoarding_Process_Matrix v4_AEM	To be used for AEM set up - QI Project	7/22/2016 7:43 AM	Ravelo, Maritza	0.3
	OffBoarding_Process_Matrixv4_AEM_VISTO	To be used for AEM set up - QI project	7/22/2016 7:43 AM	Ravelo, Maritza	0.3
	OnboardingChecklist_for_Supervisors		7/22/2016 7:43 AM	Ravelo, Maritza	0.2

MONTEREY COUNTY HEALTH DEPARTMENT
NEW HIRE, CURRENT AND EMPLOYEE TRANSFER FORM
 (This form must returned to the appropriate agencies for completion)

Bureau:		Program:		Budget Unit No.:	
Employee Name:				Phone# (Including Extension)	
Employee ID:				Hire Date:	
Position Title:				Room/Cube:	
Position Address:					
Supervisor:				Phone#	

Is this position a:

Select from drop-down

User Logon:

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County Staff Transferring to another County Program

Submit form to Health IT.

Type	Name	Description	Modified	Modified By	Version
<input checked="" type="checkbox"/>	CNTY_ITDEmp_XFR_FRM	HIT to fill out & submit to County ITD	7/22/2016 7:43 AM	Ravelo, Maritza	0.4
<input type="checkbox"/>	Emp_OnOffboardingXFR_FRM	Internal form for Mgr.Supv to fill out	7/22/2016 7:43 AM	Ravelo, Maritza	0.2
<input type="checkbox"/>	OffBoarding_Process_Matrix v4_AEM	To be used for AEM set up - QI Project	7/22/2016 7:43 AM	Ravelo, Maritza	0.3
<input type="checkbox"/>	OffBoarding_Process_Matrixv4_AEM_VISIO	To be used for AEM set up - QI project	7/22/2016 7:43 AM	Ravelo, Maritza	0.3
<input type="checkbox"/>	OnboardingChecklist_for_Supervisors		7/22/2016 7:43 AM	Ravelo, Maritza	0.2

MONTEREY COUNTY

INFORMATION TECHNOLOGY

1590 MOFFETT STREET, SALINAS, CALIFORNIA 93905-3342
(831) 759-8900 FAX (831) 759-8910



Today's Date: 10/05/2016

USER TRANSFER REQUEST – PAGE 1 of 2
Page 1 to be completed by Manager of User's **PREVIOUS** Department

IMPORTANT NOTE TO THE PREVIOUS DEPARTMENT (Dept. the Employee is leaving):

The User Account settings will be handled per your request, as detailed on this form. However, if no instructions are provided by the start date at the NEW Department, the account will be handled per standard security practice: Removal from all previous Departmental AD Group memberships, export of contents from the user's Email box, and disconnecting the user from their previous Home folder.

Please provide the following Information:

User's last day in Department:

First Name: Middle Initial: Last Name:

User Logon Account Name:

County Department Budget Unit Number:

County Position or Title:

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USER TRANSFER REQUEST – PAGE 2 of 2
Page 2 to be filled in by Manager of User's **NEW** Department

Please provide the following information:

User's last day in Department: Select a date

First Name: First Name Middle Initial: Initial Last Name: Last Name

User Logon Account Name: Username

County Department Budget Unit Number: Budget Unit #

County Position or Title: Position/Title

County Office: Office

Street Address: Street Suite/Room Number: Suite/Room

City: City Zip Code: Zip Code

Phone number: Phone Number Phone Extension: Extension

Add User to:

Email Account

Logon Script

Home Directory

Specific Logon Script, if known

Indicate Drive Letter, if known

Internet Access

BitGuard

Backup Station

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For New-Hire staff requiring access to Avatar:

Complete New User Request in Avatar

<http://www.mtyhd.org/QI/wp-content/uploads/2014/09/New-User-Request.pdf>

CHAPTER 19 – STAFF PROCEDURES

NEW USER REQUEST FORM

LOCATION	AVATAR PM→PRACTITIONER→PRACTITIONER ENROLLMENT→NEW USER REQUEST
PURPOSE	To register new employees in our Avatar and Network system. All fields are not in red however, they are necessary to request a new user Avatar account. ****Billing cannot begin until we have all information****
RULES	<ul style="list-style-type: none">You will need to enter your USER ID which is the same as your Avatar log inSIGNATURE is REQUIRED
STEPS	<ol style="list-style-type: none">Enter your USERID (ALL CAPS)Click on SelectIn the New User Request section, complete all the fields, including the Clinical License Information and the NPI Attestation section.Submit the form <p>Our QI Staff will review the form and complete the “For QI Staff Use Only” section of the form. Once ALL NECESSARY information has been completed and entered you will be notified by email.</p>

For County Staff *Transferring* to another County Teams:

Complete “Error Reporting” form in Avatar

- Select Team Assignment
- Add information in the Notes section

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Ending access to Avatar

Complete "End of Employment Bundle" in Avatar

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

END OF EMPLOYMENT BUNDLE	
LOCATION	AVATAR PM → PRACTITIONER → PRACTITIONER REGISTRATION → END OF EMPLOYMENT BUNDLE
PURPOSE	The purpose of this bundle to enter End Date and enter Exception End Date in Staff Member Hours and Exceptions form, complete the necessary items on the checklist in End of Employment form and Enter End Date on MCBH Management Hierarchy form
RULES	<p>Enter End Date and Exceptions End Date on Staff Members Hours and Exceptions form All items on the checklist need to be completed in End of Employment form</p> <ul style="list-style-type: none"> • All charges must be current • Complete Transfer/Separation Checklist • Return all clinic material • Run 200 Case Coordinator Report • Run 202 Admitting Practitioner Report • Run 306 List of Draft Notes by Clinician • Update county phone/voicemail • SIGNATURE is REQUIRED <p>Enter End Date on MCBH Management Hierarchy form</p>
STEPS	<ol style="list-style-type: none"> 1. Access End of Employment Bundle 2. Enter Staff ID or Staff Username, select Staff and then click Select 3. End of Employment form appears, complete all the fields. Make sure to check off the items on the checklist once they have been completed. Sign form and Submit form 4. MCBH Management Hierarchy form appears, select Data Entry Date and click Edit 5. Enter End Date and click Submit