![Monterey County Behavioral Health — Avanzando Juntos Forward Together]

Supervisor/Manager Checklist

EMPLOYEE INFORMATION	
Name: Click or tap here to enter text.	Start date: Click or tap to enter a date.
Position: Click or tap here to enter text.	Manager/Supervisor: Click or tap here to enter text.

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 https://npiregistry.cms.hhs.gov/

☐ Staff has applied for NPI number and is awaiting https://nppes.cms.hhs.gov/#/

☐ Complete Avatar "New User Request" form. User Guide: How to complete a New User Request. QI IT will be automatically notified and will create the profile within 72 hours of entry date.

* Completion of Avatar user access cannot be completed without an NPI number for staff who require an NPI number to bill for services. Once NPI is obtained, please email 415-QA@co.monterey.ca.us.

HEALTH INFORMATION TECHNOLOGY (HEALTH IT)

☐ Complete Health Department "Employee on Boarding" electronic form through Footprints

TRAININGS

☐ Sign up for Avatar training	☐ Sign up for the following trainings at NeoGov Learn (**note: all new staff must complete these to learn the CalAIM requirements**) • Assessment • Treatment Planning and Problem List • Progress Notes ☐ Sign up for the following trainings at CalMHSA LMS (**note: all new staff must complete these to learn the CalAIM requirements**) • Screening and Transition of Care Tools

FIRST DAY

☐ Provide employee with an orientation handbook.

☐ Assign "buddy" employee(s) to answer general questions and shadow.

POLICIES

☐ Review Key Health Department Policies	- Anti-harassment - Vacation and sick leave - FMLA/leaves of absence - Holidays - Time and leave reporting - Overtime - Performance reviews - Dress code	- Personal conduct standards - Progressive disciplinary actions - Security - Confidentiality - Safety - Emergency procedures - Visitors - E-mail and Internet use
☐ Review All Behavioral Health Policies and Procedures	☐ Review and sign Monterey County Compliance Plan Attestation (note: this can be completed in Avatar directly)	

ADMINISTRATIVE PROCEDURES

☐ Review general administrative procedures.	- Mail (incoming and outgoing) - Shipping (FedEx, DHL, and UPS) - Business cards - Purchase requests	- Telephones - Building access cards - Conference rooms - Picture ID badges - Expense reports - Office supplies

INTRODUCTIONS AND TOURS

☐ Give introductions to department staff and key personnel during tour.

☐ Tour of facility, including:	- Restrooms - Mail rooms - Copy centers - Fax machines	- Bulletin board - Parking - Printers - Office supplies	- 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, timecards (if applicable), and policies and procedures.

Information Technology (IT)

☐ Hardware and software reviews, including:	- E-mail - Intranet	- Microsoft Office System - Data on shared drives	- Databases - Internet

STAFF TRANSFERS/OFF BOARDING
HUMAN RESOURCES (HR)
☐ Submit "Request for Personnel Action" to HR
AVATAR
☐ **For Staff Transfer:** Complete "Error Reporting" form and select Team Assignment from the drop-down menu ☐ **To deactivate profile:** Complete "End of Employment" form. QI IT will be notified automatically and will deactivate account as soon as possible.
HEALTH INFORMATION TECHNOLOGY (HEALTH IT) Please contact Health IT at 755-4343 with questions regarding the completion of the electronic forms within Footprints.
☐ **Off Boarding:** Complete "Employee Off Boarding" electronic form through Footprints ☐ **Employee Transfer:** Complete "Employee On Boarding" electronic form through Footprints and choose "Employee Transfer" option under "Employee Action" field.

Updated 2/24/2023