



Contracted Provider 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		
AVATAR		
Staff who will be claiming for services <i>require</i> a National Provider Identifier (NPI) number*		
<input type="checkbox"/> Staff has NPI number https://npiregistry.cms.hhs.gov/		
<input type="checkbox"/> Staff has applied for NPI number and is awaiting https://nppes.cms.hhs.gov/#/		
<input type="checkbox"/> 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.		
<p>* 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 415QA@co.monterey.ca.us.</p>		
TRAININGS		
Mental Health Contracted Providers (required for all new staff)	Substance Use Disorder Contracted Providers (required for all new staff)	
<input type="checkbox"/> Sign up for Avatar training	<input type="checkbox"/> Sign up for Avatar training	
<input type="checkbox"/> Sign up for the following trainings at NeoGov Learn <ul style="list-style-type: none"> • Assessment • Treatment Planning and Problem List • Progress Notes • 	<input type="checkbox"/> Sign up for the following trainings at NeoGov Learn <ul style="list-style-type: none"> • ASAM Assessment (3 modules) • Treatment Planning and Problem List • Progress Notes 	
<input type="checkbox"/> Sign up for the following trainings at CalMHSA LMS (note: all new staff must complete these to learn the CalAIM requirements) <ul style="list-style-type: none"> • Screening and Transition of Care Tools (if applicable) 		
FIRST DAY		
POLICIES AND PROCEDURES		
<input type="checkbox"/> Review any relevant Behavioral Health Policies and Procedures	<input type="checkbox"/> Review and sign Monterey County Compliance Plan Attestation (note: this can be completed in Avatar directly)	<input type="checkbox"/> Review relevant SMHS or DMC-ODS Documentation Manuals posted on the QI Website
STAFF TRANSFERS/OFF BOARDING		
AVATAR		
<input type="checkbox"/> To deactivate profile: Complete "End of Employment" form. QI IT will be notified automatically and will deactivate account as soon as possible.		