

# CCM TRAINING SCHEDULE



## **DAY 1**

### ❖ **Welcome Meeting**

- ☐ Conducted by **Jenny – Care Coordination Nurse Supervisor & Tiffany - Quality Operations Manager**
  - Meeting details to be *sent out via welcome email*
- ☐ Please have UAttend and Ring Central logins and passwords ready
- ☐ Review basics of EHI system
  - Video tutorial will be presented

### ❖ **License & Malpractice Insurance**

- ☐ If not done so already, please email a copy of your current nursing license and malpractice insurance to Jenny & Amin
- ☐ If you do not have Malpractice Insurance, please refer to the email on instructions on how to obtain and email copy to Jenny & Amin
- ☐ **Fill Out All Mandatory Forms (*sent to your personal email*)**
  - ☐ Personal & Bank Information Form
  - ☐ W-4 Form
  - ☐ I-9 Form
  - ☐ Attendance Acknowledgement
- ☐ **Review CCM Booklet (*sent to your personal email*)**
  - This booklet will give you an overview of our CCM Program and what it entails for both the provider and the patient
- ☐ **Review EHI HIPAA Orientation Packet (*sent to your personal email*)**
  - Make sure to print and sign page 9 and e-mail/v3 to Jenny & Amin



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- Page 9 has been sent as separate attachment to the email

## ☐ Review CCM Program PowerPoint (*sent to your personal email*)

- This will give you an overview of what is expected on each call, especially communication wise

## **DAY 2**

### ❖ CCM Videos (*sent to your personal email, attachment called "CCM Training Video Links"*)

- Overview of EHI
- Overview of Departments
  - ☐ CCM
  - ☐ Wellness
  - ☐ Wellness
- CCM Lecture Videos
- Chart Training Videos
  - Take notes during these videos. These videos will give you an idea of how to navigate through the CCM Chart throughout the day
    - ☐ Introduction Call
    - ☐ Monthly Follow Up
      - TOC
    - ☐ 2<sup>nd</sup> Call of the Month
- Daily Tasks Videos
  - ☐ Logging onto a Campaign
  - ☐ CCM Messages
  - ☐ Preferred Call
  - ☐ Merged Charts



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- ☐ RPM Enrollment
- ☐ Sticky Note
- ☐ Updating Phone Numbers
- ☐ Deceased Patient
- ☐ Ongoing Timer
- ☐ Preferred Language Patient

## **DAY 3**

### ❖ Review CCM Orientation Packet

- ☐ Please print out document “CCM Orientation Packet” PRIOR to meeting (*sent to your personal email*), you will review this in the meeting and make notes

### ❖ Review Emergency Protocol

- ☐ Please print out document “Emergency Protocol” PRIOR to meeting (*sent to your personal email*), you will review this in the meeting and make notes

### ❖ Review CCM SOPs & RPM SOP (*sent to personal email*)

- ☐ Print out and keep handy
- ☐ Review this while testing out the chart

### ❖ Review CCM Intro Call Dialogue (*sent to personal email*)

- ☐ Rewrite this in your own words

### ❖ Meeting: CCM Orientation

- ☐ Please have any questions ready, we will answer any questions regarding the Orientation Packet
  - Meeting details to be *sent out via v3 message*



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- ☐ Review Emergency Protocol
- ☐ Review SOPs

## ❖ Testing Out CCM Chart

- Open CCM Dialer-D Module
- In the search box enter “Test Test” and click search
- Scroll all the way to right (using arrow icon) and click Open
- Click on “Start Session CCM” (timer) to practice documentation in patient chart
- Remember to click “TEST – Training Purposes” disposition **ONLY** during your training period

## ❖ Listen To All Call Recordings (*sent via v3 message*)

- ☐ Introduction calls
- ☐ Monthly follow up calls
- ☐ Long Calls
- ☐ 2<sup>nd</sup> Call of the Month

## **DAY 4**

## ❖ Review and Print CCM Documents (*sent via v3 message*)

- ***Time Off Request Form***
  - Print, sign and send **only** when needed (keep this copy on your desktop for future use)
- ***CCM Reference Sheet***
  - This guide provides contact information to the CCM Management, IT, and HR departments for when you face any issues during the day
  - ☐ Print out and keep with you throughout the day

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- ***Department of Aging Reference Sheet***

- You will use this daily as reference to help direct patients when they inquire about receiving assistance with meals, transportation, home health care, cleaning services, etc.
- This department helps in giving support to patients on a local basis and most of which will be covered/partially covered by Medicare
- Please note the CCM 24 Hour Nurses Hotline located at the bottom for a quick reference
- ☐ Print out and keep with you throughout the day

- ***PAAD Program by State Reference Sheet***

- Use this guide to help refer to patients that are in need of pharmaceutical assistance
- ☐ Print out and keep with you throughout the day

- ***Bilingual Nurses Sheet***

- Use this when you come in contact with patients who requests a nurse who speaks a specific language
- Send a v3 to the identified nurse and include all patient information including PID
- ☐ Print out and keep with you throughout the day

- ***CCM Voicemail Dialogue***

- Use this when leaving voicemails for patients
- ☐ Print out and keep with you throughout the day

- ***CCM Voicemail Greeting Script***

- Use this record a voicemail greeting for your phone line
- ☐ Please email the recording to [jenny@ehiehr.com](mailto:jenny@ehiehr.com)



# CCM TRAINING SCHEDULE



## ❖ Shadowing with CCM Nurse

- Join meeting provided by CCM Nurse
  - Meeting information will be *sent via v3 message*
- Watch CCM Nurse document while listening to an actual call with patient to see how the flow of each call goes

## **DAY 5**

### ❖ Introduction Calls

- You will be given a manual list/campaign of introduction calls to make
- ☐ Review your introduction call dialogue
- ☐ Review how to chart for an introduction call
  - Rewatch video tutorial

### ❖ Monthly Follow Up Calls

- You will be given a manual list/campaign of follow up calls to make
- ☐ Review the CCM & RPM SOPs
- ☐ Review how to chart for a follow up call
  - Rewatch video tutorial

## ❖ Review Meeting

- Meeting details to be *sent out via v3 message*
- Please have any questions/concerns you have come across during the course of your training to be discussed during this meeting

