

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
 - 2nd 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
- 2nd 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



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

