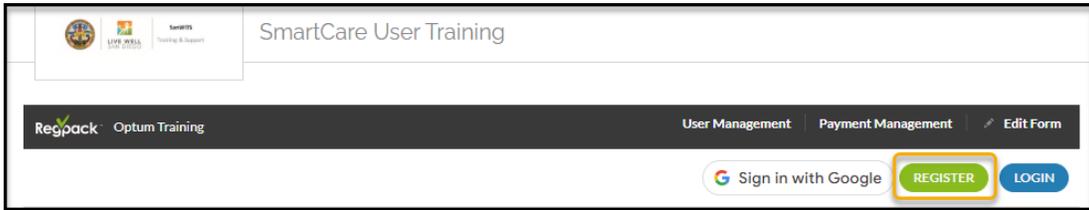## SmartCare Training Registration Tip Sheet

<mark>Step 1. – Create Account</mark>

- Using Google Chrome or Mozilla Firefox, Go to https://www.regpack.com/reg/SmartCare
- Click the **Register** button located near the top right corner of the page.

- You will be directed to the **Create Account** page.
- Complete all fields accordingly and click **"Sign Me Up!**

- Once your account is created, you will be taken to your Dashboard (homepage).
- Click **Complete My Application Now!**

- Confirm your account contact Information
- Click **Go to Next Step**

Step 3- Enter Registrant Information

- Complete all fields accordingly, then click **Go to Next Step**

Registrant Information

Red circles note mandatory fields.
Use the progress bar above to track your progress, view or navigate to other forms.

Enter the information of the staff that will be attending training:

Registrant Legal First Name ○

Registrant Legal Middle Name

Registrant Legal Last Name ○

Registrant Work Email ○

Enter a work email address. Personal email addresses will not be used for training classes.

Program Name: ○

Job Title: ○

Credentials, if any: ○

Work Phone ○

Extension

Supervisor's Name ○

Supervisor's Work Email: ○

Will you be bringing sign language interpreter(s) with you? ○ yes ○ no

If you have any training registration questions please contact
Optum: 800-834-3792 Option 3 or sdu_sdtraining@optum.com

If you have any User Support Questions please contact:
BHS_EHRProject.HHSA@sdcounty.ca.gov

GO TO NEXT STEP >>

Step 4- Acknowledge the Requirements Prior to Training.

- Mark both acknowledgement checkboxes
    - *Note: Failure to complete CalMHSA LMS modules and Submit ARF at least 7 calendar days from the selected training date, will result in exclusion.*
- Click **Go to Next Step**

Requirements Prior To Training

You must complete your required CalMHSA LMS Module training prior to registering for any additional training or support.
Please check the CalMHSA grid (click below).

CalMHSA Required LMS Training by Role Grid

Please visit California Mental Health Services Authority Learnings: Log in to the site to complete your required training for your role.

☐ I acknowledge I have completed OR will complete the required CalMHSA LMS Modules for my role at least (7) calendar days from my selected training date.
Note: Failure to complete the required CalMHSA training modules at least (7) calendar days from the selected training date will result in exclusion from the training session(s) selected. *

☐ I agree that my supervisor and I have verified the ARF was submitted before advancing to the training date selection screen.
Note: Access Request Form (ARF) Paperwork must be submitted and cleared by County MIS 7 calendar days prior to the scheduled class.*

GO TO NEXT STEP >>

Step 5- Complete Class Questionnaire

- Select your role
  - *Note: You can only select one role at a time. If you have multiple roles at your program, see page 6 for instructions on how to change roles.*
- Select a Training Session Modality (Onsite or Virtual)
- Click **Go to Next Step**

Select your Role:
- ○ Outpatient Admin Clerical Front Desk
- ○ Outpatient Clinical Direct Service
- ○ Outpatient Medical *(Previously named Prescribers & Nurses)*
- ○ Admin Billing Only
- ○ Reports *(Training is for staff who need report access. Formerly Program Managers, CORs, & QA)*
- ○ Crisis Stabilization Unit (CSU) Admin/Clerical
- ○ Crisis Stabilization Unit (CSU) Clinical/Medical *(Previously named CSU Clinical/Nurses/Prescribers)*
- ○ Residential & Crisis Residential Admin/Clerical
- ○ Residential & Crisis Residential Clinical/Medical *(Previously named Residential & Crisis Residential Clinical/Nurses/Prescribers)*

Select Training Session Modality
- ○ Onsite/In-Person
- ○ Virtual/Remote

** You must complete your required CalMHSA LMS Module training _prior_ to registering for any additional training or support.**

If you have any registration questions please contact Optum:
800-834-3792 Option 3 or sdu_sdtraining@optum.com

GO TO NEXT STEP >>

Step 6- Make a Training Selection

- Select a training date option
- Click **Go to Next Step**

Training Selection

MAKE SURE TO SCROLL ALL THE WAY TO THE BOTTOM TO SEE ALL AVAILABLE SELECTIONS.

SCHEDULES

Admin Clerical Front Desk- Onsite Training

○ Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM
Tue, Sep 16th, 2025

⌖ 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian - Suite 114

○ Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM
Tue, Sep 30th, 2025

⌖ 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian - Suite 114

○ Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM
Tue, Oct 14th, 2025

⌖ 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian - Suite 114

○ Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM
Tue, Oct 28th, 2025

⌖ 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian - Suite 114

Red circles note mandatory choices.
Use the progress bar above to return to make more choices whenever you'd like.

If you have any questions please contact Optum:
800-834-3792 Option 3 or sdu_sdtraining@optum.com

GO TO NEXT STEP >>

Step 7- Congratulations! - You have successfully registered for training

- Click **Finished**

Registration Complete

Congratulations!

You have successfully registered for training.

You will receive a confirmation email.
If you have any questions please contact Optum:
800-834-3792 Option 3 or sdu_sdtraining@optum.com

FINISHED >>

- When finished, a window will appear and ask if you want to add another registrant.
- If you'd like to add another registrant, click **Yes! Add Another** or click **No, I am done**

Add another?

Would you like to add a new record to your account? Note that you can always add another later on the dashboard.

No, I am done

YES! ADD ANOTHER

Note: You will receive a confirmation email with the training class name and date you selected

How to change/select a different role

Prior to this revision, users had to add themselves as "another registrant" to be able to select a different role and register for training. Users no longer need to do that. Users can now update their Class Questionnaire form, and new training dates for the new role will appear. See steps below.

Step1. Update Class Questionnaire

- Within your Dashboard, click on the green progress bar located to the far right of your name
- Click on **Class Questionnaire**

- The screen will display any previous selection made, select a different role
    - You may change your Training Modality as well, if you prefer.
- Click **Go to Next Step**
    - **Note**: if when clicking Go to Next Step takes you back to Dashboard, click on the progress bar to the far right of your name again, and click Training Selection

- Select a new training date option from the list and click **Go to Next Step**


- You will be returned to your Dashboard. You are done!
- If you do not receive a new training confirmation email, you may request one by sending an email to sdu_sdtraining@optum.com

How to change Training Modality and keep the same role

If you'd like to keep your current role and only change your training modality, please follow steps below. However, if you'd like to change your training modality <u>and</u> your role, please refer to steps on "How to change/select a new role" starting on page 6.

<mark>**Step 1- Remove current training selection**</mark>

- Within your Dashboard, click on the green progress bar located to the far right of your name
  - Click on **Training Selection**
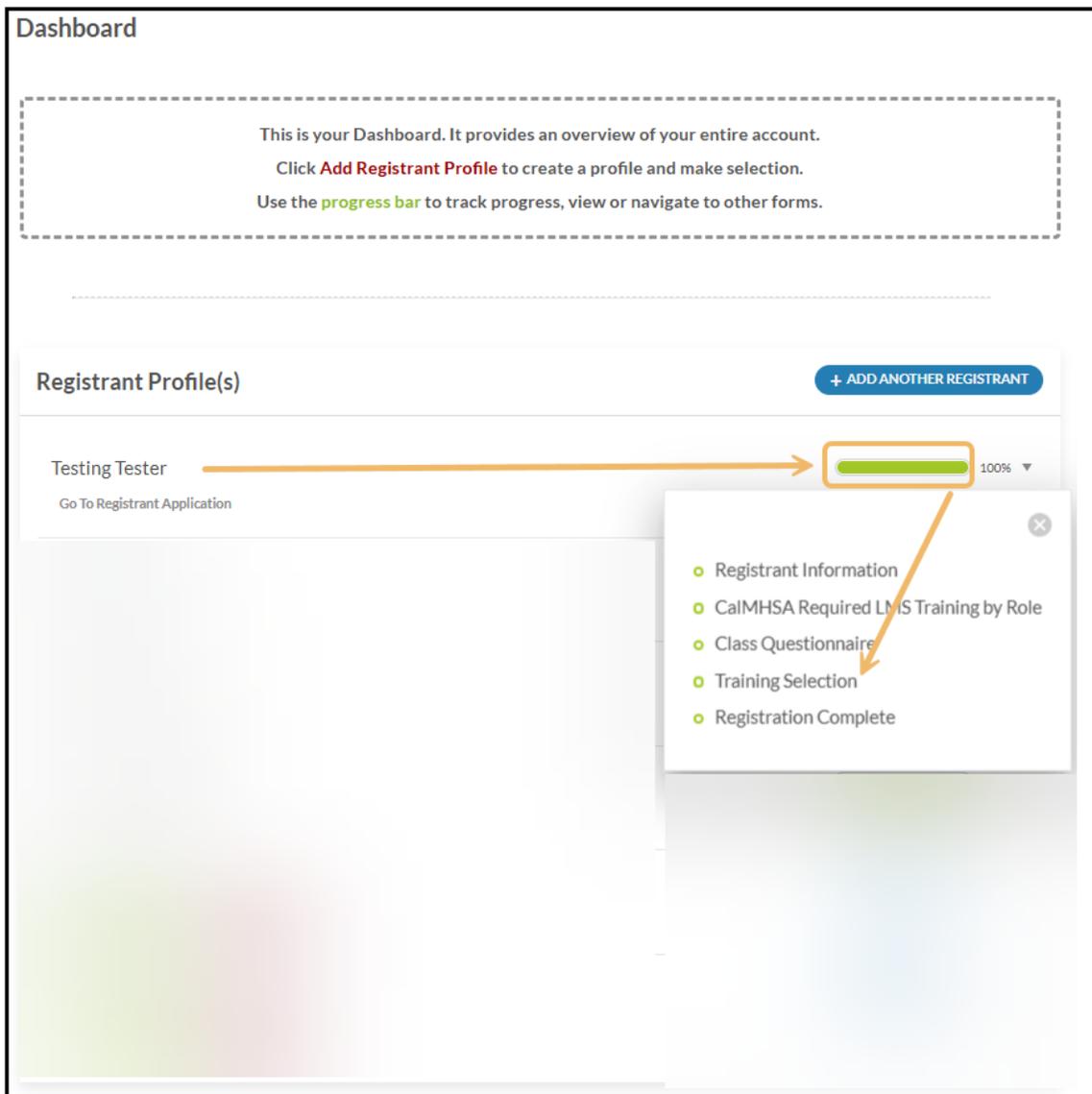
- Locate your current training selection, and click **Remove**

Training Selection

MAKE SURE TO SCROLL ALL THE WAY TO THE BOTTOM TO SEE ALL AVAILABLE SELECTIONS.

SCHEDULES

Admin Clerical Front Desk- Onsite Training

Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM
Tue, Sep 16th, 2025

⚲ 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian - Suite 114

(1 in your cart already) Remove ⟵

Onsite Admin Clerical Front Desk Training -- Morning Session -- 9:00AM - 12:00PM
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Tue, Oct 28th, 2025

⚲ 3160 Camino Del Rio South, San Diego, CA 92108 Room: Julian - Suite 114

==Step 2- Update Class Questionnaire/Change Training Modality==

- Click on the progress bar located on the top right corner of your name
- Click on **Class Questionnaire**

Testing Tester

Go To Registrant Application

⬜ Registrant Information
⬜ CalMHSA Required LMS Training by Role
⬜ Class Questionnaire
⬜ Training Selection
⬜ Registration Complete

- The screen will display any previous selection made, change the training modality

- Click **Go to Next Step**

- Select a new training date option from the list and click **Go to Next Step**
- You will be returned to your Dashboard. You are done!
- If you do not receive a new training confirmation email, you may request one by sending an email to sdu_sdtraining@optum.com

For additional assistance:

If you have any registration questions, please contact Optum Training.

☎ 800-834-3792, Option **3**

📧 sdu_sdtraining@optum.com