CareLogic Training Checklist

Employee Name: ____

Various CareLogic Training Resources can be found on the Pyramid Intranet or Extranet
https://intranet.pyramidhc.com/courses/

- Review the Counselor Manual – it can be found directly by going to this link https://intranet.pyramidhc.com/course/clinical/lessons/counselor-manual/

- Pyramid's CareLogic Overview – you will need to be on the Pyramid network to view this training
  - ☐ CareLogic Basic Training Video – https://intranet.pyramidhc.com/courses/introduction-to-carelogic/lessons/carelogic-basic-training/

- Additional Training Support Videos Provided by Qualifacts (Password for all = qsi): these do not require you to be on the Pyramid network to view
  - ☐ Scheduling: https://vimeo.com/52550457
  - ☐ Recurring Client Activities: https://vimeo.com/53024299
  - ☐ One Click Menu: https://vimeo.com/194379660
  - ☐ Alerts: https://vimeo.com/210048633
  - ☐ CareLogic Fundamentals: https://vimeo.com/53006804
  - ☐ Managing Programs & Discharging Client: https://vimeo.com/206608958
  - ☐ Maintaining Staff Relationships: https://vimeo.com/54392251
  - ☐ Dr. First (Managing/Prescribing Medications) https://vimeo.com/185718843
  - ☐ Other Video: CareLogic Overall Review (Groups/Netdrive/Carelogic/Carelogic Overall Review)
  - ☐ Review Organizations – Programs (Groups/Netdrive/Carelogic/Organizations – Programs)
  - ☐ Review Appointment Activities (Groups/Netdrive/Carelogic/Appointment Activities)

Clinical Practice in CareLogic Certification System (you will need your CareLogic account login information to complete this)

Go to - https://cert.qualifacts.org/authorization/

- ☐ Search a client in CareLogic Certification (any search of a last name will bring up someone)
- ☐ Complete Program Management to assign them your Organization and a program. You will use this client throughout your training.
- ☐ Change yourself to be primary clinician (Maintain Staff Relationships)
- ☐ Practice uploading documents to Document Library (both service and non-service documents)
- Scheduling:
  - ☐ Set up your Staff Shift – Update your Staff Shift
  - ☐ Schedule a Client activity for your new client
  - ☐ Schedule a Staff activity (blocks, lunch, clinical supervision)
- Schedule and complete a LOCA
- Make a group and put client in the group.
- Put group on your schedule, status group and complete notes.
- Completing Notes:
  - ☐ Status all appointments on your schedule as "Kept" and complete documentation if required
- Treatment Plans (For Clinical Staff who complete these):
  - ☐ Add an Initial Treatment Plan Initial
  - ☐ Add a Treatment Plan Review
- Transfer/Discharge

- ☐ Complete the transfer discharge form to refer to an additional program for the client.
- ☐ Complete the transfer discharge form to discharge the client from your program.

- Alerts
  - ☐ Clean out all of your alerts

By signing below, I am acknowledging I have reviewed the videos above as well as completed needed documentation within CareLogic certification system. I have an understanding of how to use the system and will seek out supervisor for support if needed.

Employee Signature: ____Date: ____________________________