



Staff Onboarding

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Phone Greetings:

Thank you for calling Holistic Behavioral Health. This is Carol. How may I help you?

Voicemail Message:

This is the voicemail of Holistic Behavioral Health. We can't answer your call right now, but it is important to us. Please leave a message with your name, number, and the reason for your call. We will return your call in the order in which it was received. Thank you, and have a great day.

Or

Thank you for calling Holistic Behavioral Health. We are unable to answer the phone right now. Please leave a message with your name, contact information, and the reason for your call. We will return your call as soon as possible. Please note calls received after business hours may not be returned until the next business day.

Missed Calls:

Sorry we missed your call. We'll get back to you as soon as we can. Is there anything we should know in the meantime? Thank you. Also, what is the best time to reach you?

Daily Assignments:

- Answer calls professionally and politely with a warm smile that pts can feel through the phone.
- Practice HBH answering calls
- Text messages must be proofread before sending to be sure it is professional.
- Call pts to collect payment before their appointment
- Check faxes and call all pts to confirm next-day appointments
- Arrange pt's chart in a daily folder (M-F)
- Schedule new pts and re-schedule follow-up pts accordingly
- Follow up with pts requesting for an appointment via Psychology Today - Email or call
- Schedule reps on Mondays/Friday 1 pm
- Print all new Lab results and place in the "Lab folder."

New pt from different states

- WA, OR, ID, WY - 2 hrs behind - 8am
- NM, AZ, CO, - 1 hr behind - 9am
- TX - same - 10 am
- EHR uses CST -

HBH new pt requirements:

New pt folder

- Initial pt intake form (Facesheet)
- Pt HBH Hx form - from EHR
- DL & Ins card on EHR
- Pt apt record
- VOB

New pt forms (everyone)

- HBH consent for treatment
- Release of mental health records
- HBH intake form
- Payment information

◦ Adults

- GAD7 (Anxiety)
- PHQ9 (Depression)
- MDQ (Bipolar)
- PTSD
- ADHD

• Children (6-17 y/o)

- DMDD
- ODD
 - Teenagers (13-17yrs)
 - GAD7
 - PHQ9

Fees:

- New pt: 350
- Follow-up 175
- ESA 250
- FMLA 250
- Qbtest 300
- Medical records to other companies -50 first 10 pages, thereafter \$1 per page
- Any other paperwork that needs my signature125 per page

Give access to

- ☐ Opti
- ☐ RXNT
- ☐ Square
- ☐ Zocodc



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- ☐ Email - ptcare@holistcbhealth
- ☐ Phone
- ☐ Avality
- ☐

Insurances we accept:

- Premera Blue Cross
- BC Regence
- BCBS-TX
- kaiser
- Compsych
- Anthem
- Magellan
- UMR
- Out-of-Network
- Self-pay accepted 350/175
 - Alma
 - Aetna
 - Cigna/Evernorth
 - UHC
 - Headway
 - BCBC
- We NOT accept Medicaid/Medicare - as we are not credentialed with them

New patient sources:

- Psychology Today
- Zocdoc
- HBH website
- Kaiser emails
- Calls/Google
- Alma

Payment platforms

- Square
- Strip
- Zelle



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Required Information for Payroll

Staff Name: _____ **DOB:** ____ - ____ - ____

Home Address: _____

Cell Phone #: ____ - ____ - ____ **Email:** _____

SSN: ____ - ____ - ____

Driver's License #: _____

Position: Office Assistant

Emergency Contact:

Name _____

Phone numbers: _____

Relationship to staff: _____

Please attach:

- ☒ Resume
- ☐ US ID, Driver's License, or Passport
- ☐ SSN card - copy
- ☐ 2 referral letters
- ☐ Direct Deposit Set-Up Form:
- ☐ HIPAA training Certificate
- ☐ Business Associate agreement
- ☐ Employee contract
- ☐ Passport photo to add to our team on practice website



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Websites to be familiar with:

Desktop computer - PW (2021)

Office Task

- ☐ Connecteam <https://app.connecteam.com/>
- ☐ HIPAA training Certificate
- ☐ Ring Central - Phone & Fax
- ☐

Day 1

- ☐ Connecteam - Clocking-in, Task, messaging, etc
 - ☐ <https://app.connecteam.com/>

EHR Training

OPTImantra:

Watch the videos

- ☐ <https://optimantra.freshdesk.com/support/solutions/articles/9000226937-masterclass-recording>
- ☐ RXNT -
<https://help.rxnt.com/hc/en-us/articles/360035872014-Log-Into-RXNT-for-the-First-Time#create-your-password-0-2>
- ☐ HBH <https://holisticbhealth.com/>
- ☐ HIPAA training Certificate
 - ☐ at the end of the HIPAA course the person receives this certificate -
 - ☐ <https://abholistic.com/courses/register/>

Day 2

- New pt - process of scheduling and getting them ready for appointment
 - VOB
 - DL (front)
 - Insurance card (front/back)
 - If pt is not the primary subscriber to the insurance
 - We need the full name, DOB, phone # and relationship of the p/subscriber
 - Once insurance is verified we called to inform pt of their copay if any and confirm their apt
 - B/4 pt is seen, they must complete their consent and intake forms
 - Add themn to the EHR and email "Welcome pt portal"
 - Payment information



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○ Adults

- GAD-7 (Anxiety)
- PHQ-9 (Depression)
- MDQ (Bipolar)
- PTSD
- ADHD

○ Children (6-17 y/o)

- DMDD
- ODD

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- ☐ Any other paperwork that needs my signature125 per page

☐ RXNT

☐

☐ Avality -

☐

☐ Alma

☐

☐ Zocdoc

☐

☐ Sqaure

☐ PMP - review and upload pt's medication info the day before their apt

☐

RXNT Link for Training

For Office Assistant:

https://help.rxnt.com/hc/en-us/articles/360022859611-Recall-Messages?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNRZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiJyMTE0ODYwMjU2Mjc5LCJhcnRpY2xlcyI6WzZmMDAyMjg1OTYxMzSw3NDk0OTU3MDY0MzQzLDQ0MTI4MzgwNTIxMTIdLCJ0b2t1bGl6bnVsbCwiZXhwIjoxNjc3OTA3NzkzfQ.RHO6cThKVx1dyeGkOPOLve_1OHfrINvCSO9Ihu7yeiS



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https://help.rxnt.com/hc/en-us/articles/7494957064343-Compose-a-Direct-Message?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNRZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiEYMTU0ODYwMjU2Mjc5LCJhcnRpY2xlcyI6WzZMMDAyMjU1OTYxMSw3NDk0OTU3MDY0MzQzLDQ0MTI4MzgwNTIxMTI0LCJ0b2t1b2l6bnVsbCwiZXhwIjoxNjc3OTA3NzkzfkQ.RHO6cThKVx1dyeGkOPOLve_1OHfrlNvCSO9lhu7yeis

https://help.rxnt.com/hc/en-us/articles/4412838052119-Message-Staff-from-RXNT-Product-s-Sidebar?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNRZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiEYMTU0ODYwMjU2Mjc5LCJhcnRpY2xlcyI6WzZMMDAyMjU1OTYxMSw3NDk0OTU3MDY0MzQzLDQ0MTI4MzgwNTIxMTI0LCJ0b2t1b2l6bnVsbCwiZXhwIjoxNjc3OTA3NzkzfkQ.RHO6cThKVx1dyeGkOPOLve_1OHfrlNvCSO9lhu7yeis

https://help.rxnt.com/hc/en-us/articles/360056598294-Appointment-Availability-and-Recall-Type-s?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNRZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiEYMTU0ODYwMjU2Mjc5LCJhcnRpY2xlcyI6WzZMMDAyMjU1OTYxMSw3NDk0OTU3MDY0MzQzLDQ0MTI4MzgwNTIxMTI0LCJ0b2t1b2l6bnVsbCwiZXhwIjoxNjc3OTA3NzkzfkQ.RHO6cThKVx1dyeGkOPOLve_1OHfrlNvCSO9lhu7yeis

Schedule or Request an Appointment

https://help.rxnt.com/hc/en-us/articles/4405084038551-Schedule-or-Request-an-Appointment?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNRZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiEYMTU0ODYwMjU2Mjc5LCJhcnRpY2xlcyI6WzZMMDAyMjU1OTYxMSw3NDk0OTU3MDY0MzQzLDQ0MTI4MzgwNTIxMTI0LCJ0b2t1b2l6bnVsbCwiZXhwIjoxNjc3OTA3NzkzfkQ.RHO6cThKVx1dyeGkOPOLve_1OHfrlNvCSO9lhu7yeis



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Links For Providers:

Medication Reconciliation

https://help.rxnt.com/hc/en-us/articles/4403015578519-Medication-Reconciliation?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNrZXRfaWQiOm51bGwslmRIZmxlY3Rpb25faWQiOiEYMTU0OTA5MjMxNjM5LChcnRpbY2xlcyl6WzM2MDA0NTE3Njk1NCw0NDZMDE1NTc4NTE5LDQ0MDg0Mjg0ODcwMzF0dWxsLCJ0b2tlbil6bnVsbCwiZXhwIjoxNjc3OTA4MTg4fQ.IEOrxTgR5FhEbKoaEjy0kmqA2hrw106Z4UGTugjC2t0

PMP/PDMP Connectivity

https://help.rxnt.com/hc/en-us/articles/360045176954-PMP-PDMP-Connectivity?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNrZXRfaWQiOm51bGwslmRIZmxlY3Rpb25faWQiOiEYMTU0OTA5MjMxNjM5LChcnRpbY2xlcyl6WzM2MDA0NTE3Njk1NCw0NDZMDE1NTc4NTE5LDQ0MDg0Mjg0ODcwMzF0dWxsLCJ0b2tlbil6bnVsbCwiZXhwIjoxNjc3OTA4MTg4fQ.IEOrxTgR5FhEbKoaEjy0kmqA2hrw106Z4UGTugjC2t0

View, Create, and Edit Patient Encounters

https://help.rxnt.com/hc/en-us/articles/360046494073-View-Create-and-Edit-Patient-Encounters?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNrZXRfaWQiOm51bGwslmRIZmxlY3Rpb25faWQiOiEYMTU0OTA5MjMxNjM5LChcnRpbY2xlcyl6WzM2MDA0NTE3Njk1NCw0NDZMDE1NTc4NTE5LDQ0MDg0Mjg0ODcwMzF0dWxsLCJ0b2tlbil6bnVsbCwiZXhwIjoxNjc3OTA4MTg4fQ.IEOrxTgR5FhEbKoaEjy0kmqA2hrw106Z4UGTugjC2t0

Configure Short Keys

https://help.rxnt.com/hc/en-us/articles/360034939073-Configure-Short-Keys?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNrZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiJyMTE0OTEyNzI3OTU5LCJhcnRpY2xlcyI6WzY2MDAyMjY0MTg1MiwzNjAwMzQ5MzkwNzMsMzYwMDQ2NDk0MDczXSwidG9rZW4iOm51bGwslmV4cCI6MTY3NzkwODI1MH0.B-0i3MiHcufgtBfkNXOpsB71MZJucNhgr-iA5CPsB9A#creating-a-short-key-0-0

Billing Encounters

https://help.rxnt.com/hc/en-us/articles/360022641852-Billing-Encounters?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNrZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiJyMTE0OTEyNzI3OTU5LCJhcnRpY2xlcyI6WzY2MDAyMjY0MTg1MiwzNjAwMzQ5MzkwNzMsMzYwMDQ2NDk0MDczXSwidG9rZW4iOm51bGwslmV4cCI6MTY3NzkwODI1MH0.B-0i3MiHcufgtBfkNXOpsB71MZJucNhgr-iA5CPsB9A

View and Manage New Patient Documents

https://help.rxnt.com/hc/en-us/articles/360059184813-View-and-Manage-New-Patient-Documents?auth_token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJhY2NvdW50X2lkIjo5MDcwMTQ0LCJ1c2VyX2lkIjpudWxsLCJ0aWNrZXRfaWQiOm51bGwslmRlZmxlY3Rpb25faWQiOiJyMTE0OTEyNzI3OTU5LCJhcnRpY2xlcyI6WzY2MDAyMjY0MTg1MiwzNjAwMzQ5MzkwNzMsMzYwMDQ2NDk0MDczXSwidG9rZW4iOm51bGwslmV4cCI6MTY3NzkwODI1MH0.91SBbZOYKp poYQft94uKuiph0yXFSR3gBNft5mdPft8



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