**Medi-Cal Outreach   
New Staff Training Check-List**

**Name:**

**Title:**

**Email:**

**Date:**

**Instructions:** This training checklist is intended for staff new to the Medi-Cal Outreach Program. The trainings are listed below according to whether they are required or optional based on your position and responsibilities within the program.

**After watching a training video or webinar, please record what questions you have for your supervisor and/or CCC staff, in the space provided.**

Please email this worksheet to CCC after all required trainings for your position have been completed. CCC will then be in touch with you to review your questions and suggest which of the optional/further trainings would be most beneficial for you based on your questions and interests.

For program questions, contact Brianna, Program Manager for Healthcare Access ([brianna@catholiccharitiesca.org](mailto:brianna@catholiccharitiesca.org)).

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| **Training Video/Webinar & Link or General Task** | **Description** | **Approx Length** | **Date Completed** | **Follow-Up Questions:**  **What questions do you have on this topic? Are there any points of clarification still needed** |
| **Required for All Staff** | | | | |
| [Introduction to Medi-Cal](https://www.ccchealthcareprograms.com/program-trainings?wix-vod-video-id=d7346e5291c441949fe53a5666d01570&wix-vod-comp-id=comp-jz1sdigk) | Provides an overview of the Medi-Cal program, the funding structure, application process overview, what happens after an application is submitted, follow-up assistance, and outreach strategies. | 25 mins |  |  |
| [BenefitsCal: Community Based Organization (CBO) Accounts](https://youtu.be/wykUAaLaEtc) | This video shows Community Based Organizations, or CBOs the following on BenefitsCal: - How to request access and login to BenefitsCal - The CBO Dashboard - How to submit applications - How to run reports - How to create and manage staff accounts - The help center | 16 mins |  |  |
| [BenefitsCal: How to Apply for Benefits](https://youtu.be/U1rZOW1DpSg) | This video shows users how to apply for one or more of the following programs: CalWORKS CalFresh, and Medi-Cal. | 3 mins |  |  |
| [BenefitsCal: How to Reset a password](https://youtu.be/u2RoW24nEfc) | This video shows users how to reset a password. | 3 mins |  |  |
| SOW Log | Contact your supervisor for access to your agency’s Scope of Work (SOW log) on google sheets, then [review the data entry guidance.](file:///C:\Users\CCC-Brianna\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\Resources\DHCS%20Navigator%20Data%20Entry%20Guidance.docx) | 1 hour |  |  |
| **Tasks That Require Shadowing – Required for Medi-Cal Assisters** | | | | |
| Pre-Screenings | Learn how to perform client pre-screening through shadowing fellow assisters, then perform your own with direct supervision. | 1 day |  |  |
| Application Assistance | Learn how to provide direct application assistance through shadowing fellow assisters, then perform your own with direct supervision. | 1 day |  |  |
| Follow-up & Reporting | Learn how to establish and perform client follow-up & reporting activities through shadowing fellow assisters, then perform your own with direct supervision. | 1day |  |  |
| **Optional Trainings for Special Cases and Added Assistance** | | | | |
| [How to Provide Good Outreach](https://acrobat.adobe.com/link/review?uri=urn:aaid:scds:US:e2bf4d07-10b2-34b3-8a86-67409336de96) | An additional presentation to assist in providing proper outreach and how to work with the public | 30mins |  |  |
| [Working with Immigrants: What Assisters Need to Know](https://youtu.be/l_kp1W5-Dpg) | This webinar provides an overview about concerns immigrants and their families may have about enrolling in health coverage programs. They review the “public charge” rules and other relevant policies. | 1 hour |  |  |