**CCS CRS Onboarding/Offboarding Checklist**

**Step 1: Complete Provider Application to Establish Information for a Contract**

1. Complete Provider Application including and review all CCS Program Information (pg. 5-7)
2. Complete and return packet including:
   1. Vendor information and requested rates. Pg. 2-3
   2. W-9
   3. BID doc (if you are a Sole Proprietor) - Pg. 10-11

**Step 2: Completing Contract:**

1. Upon receiving all the completed paperwork, Waukesha County Fiscal Dept. will reach out to you to sign a contract. Once this is signed and returned, you can move onto Step 3.

**Step 3: CCS Credentialing:**

1. Vendor will receive a link and password to a secure CCS CRS SharePoint site
2. Vendor will create a provider folder (name of provider) in the Employee Credentialing section
3. Vendor will upload the following:
4. Current Resume
5. Background Information and Disclosure (BID) and Results
6. References/2 Reference Checks for Employees
7. Licensee and/or Certification (if applicable)
8. CCS Provider Training Orientation.
   1. At least 40 hours of documented orientation training within 3 months of beginning employment for each staff member who has less than 6 months experience providing psychosocial rehabilitation services to children or adults with mental disorders or substance-use disorders. OR
   2. At least 20 hours of documented orientation training within 3 months of beginning employment with the CCS for each staff member who has 6 months or more experience providing psychosocial rehabilitation services to children or adults with mental disorders or substance-use disorders.
9. Waukesha County will review resumes/years of experiences to determine the 20 or 40 hours.
10. Waukesha County will send the employee the training materials, but vendorwould pay the staff for the training time, that is not reimbursable.

**Step 4: Access to Electronic Health Record (myAvatar)**

1. Credential materials reviewed; vendor provider added to vendor roster
2. Waukesha County creates helpdesk ticket with IT to create myAvatar username and login. Waukesha County assigned vendor relations will provide vendor with myAvatar ID.

**Ongoing Maintenance:**

* Supervision Log(s)
  + Each staff member qualified under s. DHS 36.10 (2) (g) 9. to 22. shall receive, from a staff member qualified under s. DHS 36.10 (2) (g) 1. to 8., day−to−day supervision and consultation and at least one hour of supervision per week or for every 30 clock hours of face−to−face psychosocial rehabilitation services or service facilitation they provide. Day−to day consultation shall be available during CCS hours of operation
* Training Log (Yearly)
  + CCS requires a minimum of 8 hours of continuing education pertinent to your CCS provider role.

**CCS CRS Offboarding Checklist:**

1. Vendor and/or Admin notifies Waukesha County assigned vendor relations staff five (5) business days prior to the staff member leaving.
   1. In the event of misconduct, termination, or unexpected discharge, vendor will call the HelpDesk to terminate access immediately.
2. Supervisor ensures finalization of any outstanding notes, supervision logs, and training logs
3. Waukesha County assigned vendor relations staff will submit HelpDesk ticket to IT to disable access.
4. Waukesha County assigned vendor relations staff will remove provider credentialing file from SharePoint and put in archived file for future access