



Sentiero SkillBridge Training Plan

Job Title			
Behavioral Health Administrative Assistant (BHAA)			
Direct Report:	Clinical Director	Indirect Report:	President
Other Benefits:	Opportunities for Hire	Profession:	Administrative (Health)

Summary of Job Profile	
Area	Description of Purpose
Sentiero's Purpose	<p>The partners at Sentiero believe in the importance of education and training, diverse thoughts and people, healing from the deepest part of ourselves, and involving stakeholders to approach wellbeing from a holistic perspective. This is why we have psychoanalytic training in psychotherapy, often involve the family and/or schools in treatment, and recently formed Sentiero Wellness. We hold a special place in our services for active duty military, veterans, and military dependents, with over 95% of our Patients referred through Tricare or TRIWEST. Our team currently includes various schools of thought within psychology from school and clinical psychology to cognitive behavioral and psychoanalytically-oriented psychologists. We are composed of clinicians with various levels of education and we take pride in training students who are the next generation of psychologists. Our licensed psychologists lead the way, our pre- and post-doctoral students provide fresh perspectives. Our Human Resources (HR) team binds and organizes us. Our vision is for all people, regardless of ethnic, social, cultural, or economic background, to have access to high-quality mental health care. Our mission is to enrich the psychological health of children, adolescents, adults, and families through services that are seamless, accessible, and inviting.</p>
Job's Purpose and Importance to the Organization	<p>Our organization depends on non-clinical human resources (HR) and administrative partners to be the first line of communication and service delivery for our patients, stakeholders, and referral sources. While the clinicians at Sentiero provide expertise in mental health interventions and advocacy for the many patients we serve, Sentiero depends on our HR and administrative department to support fluid operations and continuity of care for our patients. As the first point of contact, administrative assistants require base-level mental health knowledge, privacy and compliance with confidentiality policies, situational, and crisis awareness to streamline prospective patients to the appropriate services. This role is also important for the management and support of the clinical employees, who benefit from the human resources support provided by the HR and Administrative team. This role is an entry level role that is critical for our growth and evolving workforce. Their alignment with the Executive Director gives the Behavioral Health Administrative Assistant (BHAA) the support and direction to be successful in servicing our patients during the initial referral process and continuity of care. They play a very important role in driving our patient and clinician satisfaction metrics high with the level of engagement the BHAA is expected to deliver.</p>



Role Responsibilities and Activities	
Responsibility/Activity	Estimated Annual % of Time
<p>Patient Engagement – Dedicated support personnel and technical liaison for our patients.</p> <ul style="list-style-type: none"> • Cover the reception desk and greet/provide general support to patients in the office • Answer phone calls; reply to email and telephone inquiries • Contribute to team effort by providing information, answering questions, and assisting with various staff requests • Manage our patient expectations of service and engagement to promote a high satisfaction level of service delivery across all role expectations. 	25%
<p>Administrative Duties – Attend weekly staff meetings and contribute to the monthly and weekly operations of the clinical business.</p> <ul style="list-style-type: none"> • Carry out administrative duties such as filing, typing, copying, binding, scanning, etc. • Develop and/or maintain computer and manual filing systems. • Handle protected health information in a confidential matter • Organize and schedule meetings/appointments 	40%
<p>Clerical Duties - Provide office support to remain in compliance with Center for Disease Control and HIPAA guidelines.</p> <ul style="list-style-type: none"> • Receive, sort, and distribute incoming mail. Mail outgoing packages/mail and get supplies from the post office. • Maintain supplies inventory by checking stock to determine inventory level; anticipating needed supplies; placing and expediting orders for supplies; verifying receipt of supplies • Disinfecting and cleaning responsibilities 	20%
<p>Technical Training – Execute and manage your technical and personal training plans aligned to a Behavioral Health Administrative Assistant role.</p> <ul style="list-style-type: none"> • Review your training plan with your designated Executive Director and President on a quarterly basis to ensure that training aligns with partner needs and overall product strategy. 	15%

Length of Training
180 days (24 weeks)



Timeline	
Quarter 1: Week 1 - 6	Week 1: Module 1 - Program Introduction Week 2-4: Module 2 - Business Operations Part 1 Week 5-6: Module 3 - Business Operations Part 2
Quarter 2: Week 7 - 12	Week 7-10: Module 4 - HIPAA Privacy Practices and Policies Week 11-12: Module 5 - Program Development/Evaluation Part 1
Quarter 3: Week 13 - 18	Week 13-15: Module 6 - Behavioral Health Support Services Week 16-18: Module 7 - Personnel Development
Quarter 4: Week 19 - 24	Week 19-21: Module 8 - Professional and Leadership Development Week 22-24: Module 9 - Program Development/Evaluation Part 2

Learning Modules	
Training Titles	Learning Outcomes
Module 1: Week 1 Program Introduction	Self-assessment, goals for training, current competencies and strengths. Introduction to reflective practice and developmental training model.
Goal: Trainee will orient to Sentiero's practice and the goals of their training.	<p>Checklist: Week 1</p> <ol style="list-style-type: none"> 1. New Hire orientation: <ol style="list-style-type: none"> a. Review training plan - conduct and termination b. Paperwork and Privacy Agreement c. Orientation to Office d. Quickbooks Time e. TherapyNotes f. Google Workspace g. Sexual Harassment Training h. HIPAA Training 2. Reflective Supervision and Developmental Model <ol style="list-style-type: none"> a. Dr. LLC will review reflective practice and developmental models of training. b. Complete self-evaluation c. Complete goal setting
Module 2: Week 2 - 4 Business Operations Part 1	Competency in the area of Business Operations: Operations manual, electronic management systems, and employee handbook.



<p>Goal: Trainee will build competency in operations of business to meet patient needs.</p>	<p>Checklist: Week 2</p> <ol style="list-style-type: none"> Review Operations manual (full) <ol style="list-style-type: none"> Understanding operations of admin versus clinical, differentiating roles. Navigating Google Workspace Phone system and email templates <ol style="list-style-type: none"> Review responses to referral inquiries and scheduling Review responding to inquiries via portal and email. <p>Checklist: Week 3</p> <ol style="list-style-type: none"> Review Employee Handbook (full) <ol style="list-style-type: none"> Understanding expectations and policies in the workplace Continue reviewing Operations manual <p>Checklist: Week 4</p> <ol style="list-style-type: none"> Covering phone system for: scheduling and referral inquiries Covering welcome emails to patients If time allows: Complete HR or Business Operations Certificate via HRCI Learning Center or SHRM.org
<p>Module 3: Week 5 - 6 Business Operations Part 2</p>	<p>Competency in the area of Human Resources: Billing operations and human resources.</p>
<p>Goal: Trainee will become familiar with elements of human resources to support clinicians and other employees.</p>	<p>Checklist:</p> <ol style="list-style-type: none"> Review Billing Operations section of Operations Manual Overview of Billing in Therapy Notes <ol style="list-style-type: none"> Elements of patient chart to submit billing. Billing tab of Therapy notes, identifying unresolved balances and rejected claims. Overview of Human Resources part 1 <ol style="list-style-type: none"> California Labor Laws Hourly, Salary, and Contract Employees Overview of Human Resources part 2 <ol style="list-style-type: none"> New Hire Package Benefits Package
<p>Module 4: Week 7 - 10 HIPAA Privacy Practices and Policies</p>	<p>Competency in the area of Policy and Practice: Handling of Protected Health Information (PHI), Business Associate Agreements (BAA), and California laws related to practice of professional psychology.</p>
<p>Goals: Trainee will learn administrative maintenance of patient records.</p>	<p>Checklist:</p> <ol style="list-style-type: none"> Review HIPAA policies Highlight business procedures utilized to maintain PHI Review SkillBridge Program & Privacy Agreement signed by trainee California Law and Ethics training
<p>Module 5: Week 11 - 12 Program Development/Evaluation part 1</p>	<p>Competency in the area of Program Development: Reviewing progress on goals, critical feedback, program support and adjustment.</p>
<p>Goal: Trainee and supervisor will reflect</p>	<p>Checklist</p>



on training thus far and complete mid-training evaluation.	<ol style="list-style-type: none"> 1. Supervisor to submit request for client feedback regarding front desk support by trainee 2. Supervisor will provide self-assessment and supervisor assessment for trainee to complete one week prior to next scheduled supervision 3. Trainee and supervisor to explore continued areas of growth and Skillbridge training program improvement to meet trainee needs.
Module 6: Week 13 - 15 Behavioral Health Support Services	Competency in the area of Secondary Behavioral Health Support: Mandated reporter laws, risk assessment training, assessing need for clinical consultation (e.g., billing and scheduling).
Goal: Trainees will learn how administrative roles support the clinical needs in psychotherapy private practices.	<p>Checklist:</p> <ol style="list-style-type: none"> 1. Overview of Credentials of each associate - LLC or Dr. K <ol style="list-style-type: none"> a. Roles: What are behavioral health support specialists, AMFTs, Psychological associates, and licensed psychologists? b. Understanding the Supervision Contract, board registration, and NPI numbers 2. Mandated Reporter Training 3. Safety Risk Assessments 4. Decision tree with consultation
Module 7: Week 16 - 18 Personnel Management	Competency in the area of Management Essentials: Monitoring hourly payroll for non-exempt employees, time-off requests, labor laws, workplace risk mitigation, emergency responses in office buildings.
Goal: Trainee will build competency towards support and management of employees in the workplace.	<p>Checklist:</p> <ol style="list-style-type: none"> 1. Review hourly guidelines of employees 2. Review emergency response plan (<i>Point of Contact: Clinical Director</i>) 3. Identifying security breaches of protected information with protected and special populations 4. Submitting and approving time off and other requests 5. The importance of self care!
Module 8: Week 19 - 21 Professional and Leadership Development	Competency in the area of Leadership Essentials : Managing stakeholder relationships, networking, resume building and post-training preparation
Goal: Trainee will identify opportunities that will support continued professional growth.	<p>Checklist:</p> <ol style="list-style-type: none"> 1. Review resume and obtain feedback from two supervisors 2. Identify one networking event related to the field of practice that the trainee would like to attend.
Module 9: Week 22 - 24 Program Development/Evaluation part 2	Competency in the area of Program Development: reflective feedback, self-monitoring, quality assurance procedures, program evaluation.
Goal: Review and evaluation of training.	<p>Checklist:</p> <ol style="list-style-type: none"> 1. Complete final self-assessment and review SMART goals



	<ol style="list-style-type: none"> 2. Complete final evaluation with supervisor, provide completed assessment of training program. 3. Obtain a certificate of completion!
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Learning Objectives
Business Operations
Professional Development
Policy and Practice
Human Resources
Secondary Behavioral Health Support
Leadership Essentials
Management Essentials
Program Development

Instructional Models
Direct Instruction - Synchronous in-vivo training
Indirect Instruction
Interactive Instruction - Asynchronous Online Model
Experiential Learning
Independent Study

Instructor Qualifications	
Emily N. Kierce, Psy.D., NCSP	Doctor of Psychology in Clinical Psychology Licensed Psychologist Harvard Business School Online Certificate in Leadership Principles Completion of Business Lessons Workshop at Harvard Business School Online

Assessments	
Sentiero Performance Evaluation	80% of ratings fall within Meets Expectations
Certificate Course Evaluations (Business Operations & Human Resources)	85% Accuracy on post-training quizzes
360 Evaluation	Multi-rater and multi-modal assessments regarding leadership. Regularly discussed with immediate supervisor and trainee
Patient Satisfaction Survey	Minimum rating 3 out of 5 on likert-scale ratings

Training Outcomes
Completion Certificate – Business Operations
Completion Certificate – Human Resources