



# Shortage Designation Management System (SDMS)

## Provider Management User Guide

**Associated Resources:**  
Facility Form User Guide  
PCO Portal User Guide  
Mapping Tool User Guide

**November 2015**



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## 1. SEARCH PROVIDERS

The purpose of the Provider Management functionality is to give the PCO the ability to search for a provider and update eligible information.

Figure 1 - Provider Management Landing Page

- 1. NPI** Enter the 10-digit numerical National Provider Identifier in this field.
- 2. Last Name** Enter any text in this field, only exact matches will be returned.
- 3. First Name** Enter any text in this field, only exact matches will be returned.
- 4. Discipline** Select one of the 3 disciplines:
  - PC: Primary Care
  - MH: Mental Health
  - DH: Dental Health
- 5. Specialty** Select one of 10 disciplines. Note that once a discipline is selected, only the specialties that fall under that discipline will be available for selection.
  - PC: Primary Care
    - FP: Family Practice
    - IM: Internal Medicine
    - OBG: Obstetrics and Gynecology
    - PD: Pediatrics
  - DH: Dental Health
    - GDT: Dentist
  - MH: Mental Health
    - PSY: Psychiatrist
    - CPSY: Clinical Social Psychologist
    - CSW: Clinical Social Worker
    - PNS: Psychiatric Nurse Specialist
    - MFT: Marriage and Family Therapist
- 6. County FIP** Select any of the County FIPs provided in the dropdown; conditional to the state selected.



- 7. County Name** Select any of counties available for that state; conditional to the state selected.
- 8. MCD** Enter any 10-digit numerical value in this text, only exact matches will be returned.
- 9. Census Tract** Enter any 11-digit numerical value in this text, only exact matches will be returned.
- 10. License Number** Enter any numerical value in this text, only exact matches will be returned.
- 11. Recent NPI Update** Select one of the 2 options:
- True
  - False
- 12. Status** Select one of the 4 options:
- Included
  - Omitted, PCO
  - Omitted, Ineligible Taxonomy
  - Omitted, NPI Deactivated
- 13. State** Select any one of the 50 state or 6 territories.
- 14. Successfully Geocoded** Select one of the 2 options:
- Yes
  - No
- 15. Clear** Click on this button to clear all the search criteria.
- 16. Search** Click this button to run the search, after at least one criteria has been entered into a field.



## BUSINESS RULES

- At least one search criteria is required to run the search.
- Each search criteria will run only exact matches.  
Ex. A misspelled name will render no results. (See Figure 2)
- Fields are not case-sensitive.
- Only one option may be selected in the discipline and specialty dropdown menus.

Please enter at least one Search Criteria.

Provider Management was created to support a database of providers that can be used in the designation process. The foundation for this database comes from the NPI (National Provider Identifier) data. As a PCO you are able to review providers in your state and update information in order to be used in the designation process. Please click on the Provider Management tab to begin to search and make updates to providers.

NPI	Last Name	First Name	Discipline	Specialty	County FIP
10-digit number			Select	Select	Select
County Name	MCD	Census Tract	License Number	Recent NPI Update	Status
Select	11-digit number	11-digit number		Select	Select
State	Successfully Geocoded				
Select	Select				

Clear Search

Figure 2 - Error: Enter Search Criteria

### For “Recent NPI Update”

- If a provider record is updated by NPI file then “NPI update” = true
- When you click on record in search results then “NPI update” = false
- The flag of “NPI Update” in search results stays as ‘true’ until a PCO clicks on the detail of the record
- Viewing a provider detail record is not saved or tagged to the PCO user

### For State:

- The default state is set to state associated the username of the PCO
- You can elect to search on any other state
- If you select [Clear] all values will default to original choices and state will default to that of the PCO



## 2. PROVIDER SEARCH RESULTS

After correctly entering search criteria and clicking on the search button, the results of the search criteria will display.



NPI	Discipline	Specialty	Last Name	First Name	Hours	County FIP MCD	Census Tract	Updated	
1538552310	PC	IM	PRASAD	SHAYNE	40	010		06/16/2015 21:23	
1275967010	PC	IM	AMOA	JEROME	▲ 0			06/07/2015 07:46	
1053705665	PC	IM	SITILI	ARICA	▲ 40	010		06/06/2015 18:15	
1720471501	PC	IM	CHAWRASIYA	LABH	▲ 40	010		06/06/2015 18:15	
1770976557	PC	IM	ORLEANSKI	DIMITRI	▲ 40	010		06/06/2015 18:15	
1598158370	PC	IM	INOKE	LAVENIA	▲ 40	010		06/06/2015 18:15	
1366835142	PC	IM	LIANA	IANETA	▲ 40	010		06/06/2015 18:15	
1538552302	PC	IM	POROTESANO	FIATELE	▲ 40	010		06/06/2015 18:15	
1467845248	PC	IM	LESUMA	AKOSITA	▲ 40	010		06/06/2015 18:15	
1912390790	PC	IM	VERGARA	BRENAIDA	▲ 40	010		06/06/2015 18:15	
1194118976	PC	IM	LAITITI	SALOFI	▲ 40	010		06/06/2015 18:15	
1104219989	PC	IM	ALEZIRI	DUNSTONE	▲ 40	010		06/06/2015 18:15	
1003208703	PC	FP	LAUVAO	ELIZABETH	▲ 40	010		06/06/2015 18:14	
1033500376	DH	GDT	SIPELII	TOKO	40	010		06/06/2015 18:12	
1467842559	PC	FP	TITIIMAEA	ELIA	40	010		06/06/2015 18:11	
1689063281	PC	FP	YADAV	PUSHPA	▲ 40	010		06/06/2015 18:11	
1285032763	PC	FP	ROBY	FAIESE	40	010		06/06/2015 18:09	
1265830194	PC	FP	AITAOTO	AITAOTO	▲ 40	010		06/06/2015 18:08	
1831315043	DH	GDT	WIEKHORST	TODD	▲ 40	019	0401993570	04019004710	12/19/2014 16:38
1205057866	DH	GDT	BIRDWELL	ROBERT	▲ 40	013	0401390867	04013614100	12/19/2014 16:38

Figure 3 - Provider Search Grid



- 1. Columns** Allows the user to customize the columns that are part of the search grid, see “Search Result Column Display” section for more detail.
- 2. Viewing 1 – 20 of # Results** Displays the total number of results returned.
-  Click to move to the next page.
-  Adjust the number of records viewed per page by clicking on the dropdown and selecting 10, 20, 50, or 100. The search results page is defaulted to 20 records per page.

## USER NOTES

- Click on the NPI to navigate to provider profile.
- Data may only be saved successfully by pressing ENTER on the keyboard after editing each provider’s information.

## BUSINESS RULES



- Total Hours will be defaulted to 40 hours and can be identified by a visual indicator  .
- If the Tour Hours have been updated, the visual indicator  will not be displayed.
- Sort the search result by ascending or descending order by clicking on any the column header.
- Information from NPI database is read-only.

## CUSTOMIZE GRID COLUMNS

Add, remove, or order the columns on the Search Results grid by clicking on the columns icon.

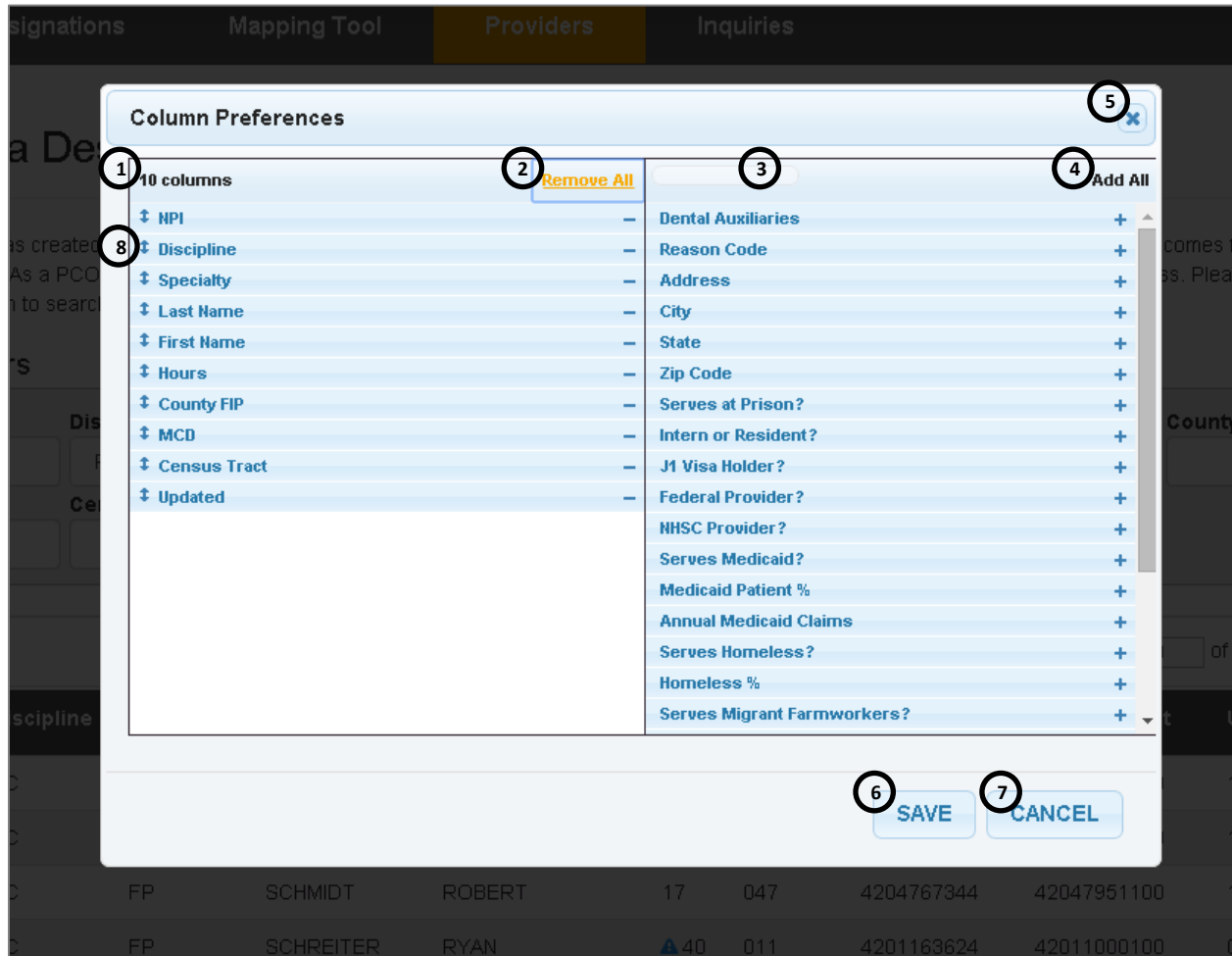


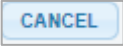





Figure 4 - Column Preferences

- 1. # of Columns** Find a total count of columns to display on the results grid.
- 2. Remove All** Remove all columns displayed in the search.
- 3. Search Field** Type any column header to filter the display of list on the right hand side list.
- 4. Add All** Select this link to add all the columns to be displayed on the results search grid.



5.  This icon behaves the same way as the cancel button and removes the pop-up without saving the changes.
6.  Select the save button to save any changes made for the column preferences. The system will display the changes in the search result grid and the pop-up will disappear from screen.
7.  Select the cancel button to discard any changes, and the pop-up will disappear from screen.
8.  Select and sort criteria.

## USER NOTES

- Click on the  to remove a column or click on the  to add the column for display.
- The search result grid can display up to 34 column headers.
- The first five: NPI, Discipline, Specialty, First Name, and Last Name column headers will remain frozen in order.
- Direct Tour Hours can only be changed to 0 and saved if the Reason Code column is added to the search grid view, so that the reason code can be specified.

## EDIT IN THE GRID VIEW

The purpose of this functionality is to enable PCOs to quickly update multiple records at once and save. After reviewing the search results on the grid, make edits directly within the grid and save without having to go into the details of the provider record.

## INSTRUCTIONS



1. Double click on the row of the provider to edit.
  2. Make edits to the fields that are editable.
  3. Press Enter on the keyboard to save changes after editing each row of provider information. There will be no save confirmation message.
- Note that all data from NPI is read-only.

NPI	Discipline	Specialty	Last Name	First Name	Hours	County FIP	MCD	Census Tract	Updated
1225025430	PC	FP	CIENCIVA	ROSEMARIA	20	047	4204767344	42047951100	10/23/2014 15:16
1427087774	PC	FP	WU	CHAU	14	047	4204738248	42047950500	10/23/2014 15:06
1780688481	PC	FP	SCHMIDT	ROBERT	17	047	4204767344	42047951100	10/23/2014 14:58
1205190014	PC	FP	SCHREITER	RYAN	▲ 40	011	4201163624	42011000100	09/22/2014 22:46
1285673582	PC	FP	BRADY	JOANNA	40	057	4205776985	42057960100	09/22/2014 22:46
1285698266	PC	FP	MARTIN	RICHARD	▲ 40	077	4207702000	42077001000	09/22/2014 22:46
1326035015	PC	FP	GEHMAN	GARY	▲ 40	071	4207141224	42071013502	09/22/2014 22:46
1326040296	PC	FP	MCCOLLUM	GEORGE	▲ 40	003	4200361000	42003300100	09/22/2014 22:46
1205821519	PC	FP	WITHERITE-RIEG	LISA	▲ 40	065	4206587168	42065951100	09/22/2014 22:46

Figure 5 - Edit Hours in Search Grid





1.  All the fields that are read-only will be displayed in gray in edit mode. The data for these fields is provided by the NPI.
2.  All editable fields will have a white background or a dropdown menu with a “Yes” or a “No” option.

## BUSINESS RULES

- All read-only fields will be displayed in gray while in edit mode.
- All % fields are dependent on the answers to the “Yes” or “No” dropdown answers of the applicable question.
- The maximum % is 100.
- When Hours are changed to 0, a warning message will be displayed. The warning message reads: “You must provide a Reason Code when setting Direct Tour Hours to 0.” (See Figure 6)
- The **Dental Auxiliaries** column may only be saved if the discipline of the provider record is a DT: Dental discipline. If a PCO enters in a numerical value into this field for any other disciplines, the system will display an error message. (See Figure 5)

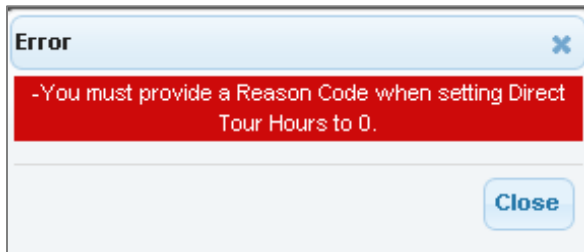


Figure 7 - Reason Code Error

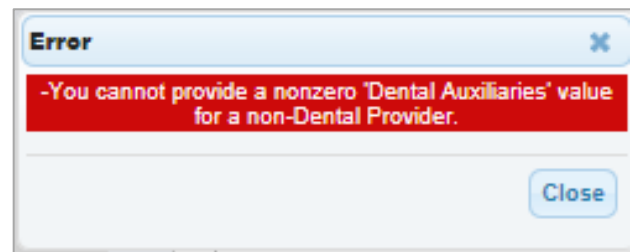


Figure 6 - Dental Auxiliaries Error

## USER NOTES

- You user must hit “Enter” on the keyboard to save while editing in the search grid.
- Use the scroll bar on the bottom of the search result grid to navigate horizontally across the search results to a column.



### 3. PROVIDER INFORMATION

Click on the NPI in the search grid to be brought to the provider overview page, which displays the provider’s basic information and taxonomy details.

**1** BEAM, MELANIE

Overview **NPI Primary Address** Add a new Location

**2** Last Updated: 10/02/2015 14:24  
No history found for this provider

Provider Information

NPI	1588724710	Age	36
First Name	MELANIE	Physician Gender	FEMALE
Middle Name	ANNE	Email Address	N/A
Last Name	BEAM	Discipline	Dental Health
Suffix	N/A	Specialty	Dentist

**3** Provider Taxonomies

\*Bold text denotes the primary taxonomy row

Taxonomy Code	Taxonomy Description	License Number	Taxonomy State
<b>1223G0001X</b>	<b>General Practice</b>	12010742A	INDIANA

New Comment

Add Comment

There are no existing comments.


**4** Back to Search Results **5** Save Provider Information

Figure 8 - Provider Overview

- 1. Last Name, First Name** The name of the provider in view is displayed here.
- 2. Last Updated** This is the last date the provider record has been updated. If the record has not been updated, it will display the date on which the record was created. The format for display is: MM/DD/YYYY HH:MM (24-hour time)
- 3. Provider Taxonomies** This section lists the provider’s Taxonomy information. If a provider has multiple taxonomies, the bolded row represents the primary taxonomy.
- 4. Back to Search Results** Click on this button to return to the search results page with the last successful search results. If changes were made without saving the provider information, the changes will be lost and the system will display the last successful search results page.
- 5. Save Provider Information** Click on this button to save any provider details fields that were updated.



## USER NOTES

- All read-only data cannot be updated through the system and can only be updated through the NPI Primary File or delta file.
- Last updated time and date will be captured after the user clicks “Save Provider Information.”
- The “NPI Primary Address” is the primary location of practice that the provider has submitted to NPI.
- A warning message will appear on the right side of the screen when there are unsaved changes entered on the page. (See Figure 8)
- After clicking  at the bottom of the page, a status message will appear at the top of the new page to verify that the information saved successfully. (See Figure 10)

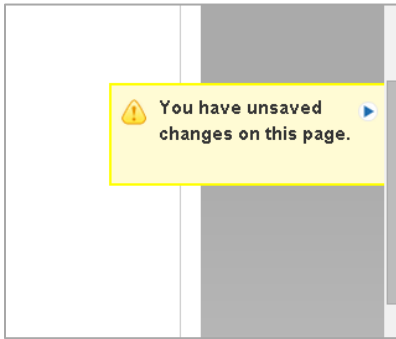


Figure 9 - Unsaved Changes

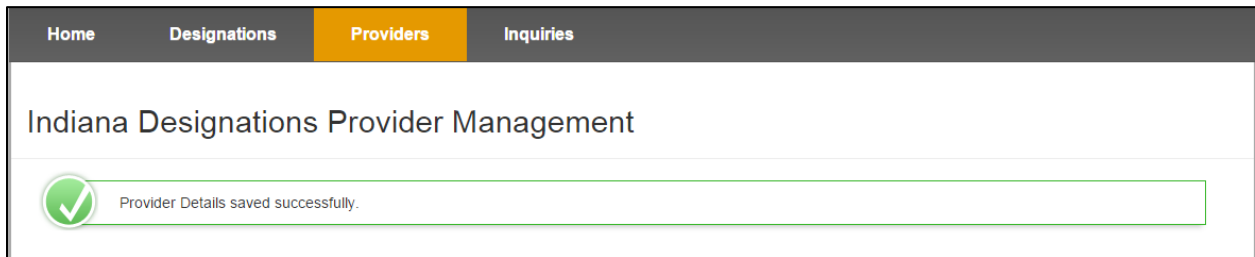


Figure 10 - Provider Details Saved Successfully



## 4. PROVIDER HISTORY

Clicking on the [Overview] tab will show the Provider History function. Any history records (if they exist) will be available as a drop-down. The time/date stamp and user id for each revision made by NPI updates or PCO updates will be captured as a unique history record. The default view is for 'Current'.

BEAM, MELANIE

Overview **NPI Primary Address** Add a new Location

Last Updated: 09/10/2015 16:56

1 Revisions 09/10/2015 - 16:56 (khoulha@iupui.edu) 09/10/2015 - 16:56 (khoulha@iupui.edu) 2 View Revision

Provider Information **Current**

3  Field differs from the Current information

NPI	1588724710	Age	N/A
First Name	MELANIE	Physician Gender	FEMALE
Middle Name	ANNE	Email Address	N/A
Last Name	BEAM	Discipline	Dental Health
Suffix	N/A	Specialty	Dentist

Provider Taxonomies

**\*Bold text denotes the primary taxonomy row**

Taxonomy Code	Taxonomy Description	License Number	Taxonomy State
<b>1223G0001X</b>	<b>General Practice</b>	<b>12010742A</b>	<b>INDIANA</b>

### INSTRUCTIONS

1. Select the drop-down next to "Revisions" and click the [View Revision] button.
2. View the changes by selecting the tabs for the record.
3. Selecting any history records other than "Current" will enable the Field differ from the Current information legend. Use the blue highlighting to compare the history record to the Current record.

**1. Revisions** The time/date stamp and user id for any history records

**2. View Revision** To activate and view any previous revision of history records.

**3. Field differs from the Current Information** A legend that appears when you select any history revisions.



## 5. NPI PRIMARY ADDRESS

The NPI Primary Address is the default address used for determining FTE Calculations and cannot be edited by the user. There are four groupings on the NPI Primary Address:

- Address (Read-Only & Editable)
- Geocoded Address (Read-Only & Editable)
- FTE Calculations (Read-Only)
- Clinical Information (Editable)

BEAM, MELANIE

[Overview](#) [NPI Primary Address](#) [Add a new Location](#)

### NPI Primary Address

Last Updated: 10/02/2015 14:24

**1** **▼ Address**

Status	Included
Address Line 1	101 N MISHAWAKA STREET
Address Line 2	N/A
City	AKRON
State	IN
Postal Code	46910
Phone Number	(574) 598-2910
Fax Number	(574) 598-2911

**2** Number of Dental Auxiliaries \*

**3** Direct Tour Hours

**4** Reason Code

**5** Is address a Correctional Facility?

**▶ Geocoded Address**

**▶ FTE Calculations**

**▶ Clinical Information**

Figure 11 - NPI Primary Address



- 1. Address** This is the address provided by the provider in the NPI file as the primary location of practice.
- 2. # of Dental Auxiliaries** This field is only available for providers with a discipline of “DT: Dental.” All other disciplines will not see this field.
- 3. Direct Tour Hours** The “Direct Tour Hours” will be defaulted to 40 hours, and Geographic HPSA will be 1.00 in the FTE Calculations. PCO can enter whole number integers from 0-168 hours.
- 4. Reason Code** This field is only enabled if the “Direct Tour Hours” is changed to 0.
- 5. Is address a Correctional Facility?** This field has a dropdown with the following options:
  - Yes
  - No

**USER NOTES**

- SDMS does not calculate primary care FTEs when only office hours are known. It is the responsibility of the user to enter the correct tour hours (adjusted or otherwise) into SDMS. See Section IV of the Manual for Policies and Procedures for more detail.

**EDIT DIRECT TOUR HOURS AND REASON CODE**

Revise the “Direct Tour Hours” in the “Address” section. If the “Direct Tour Hours” are reduced to 0, the user must select a reason code from the dropdown list.

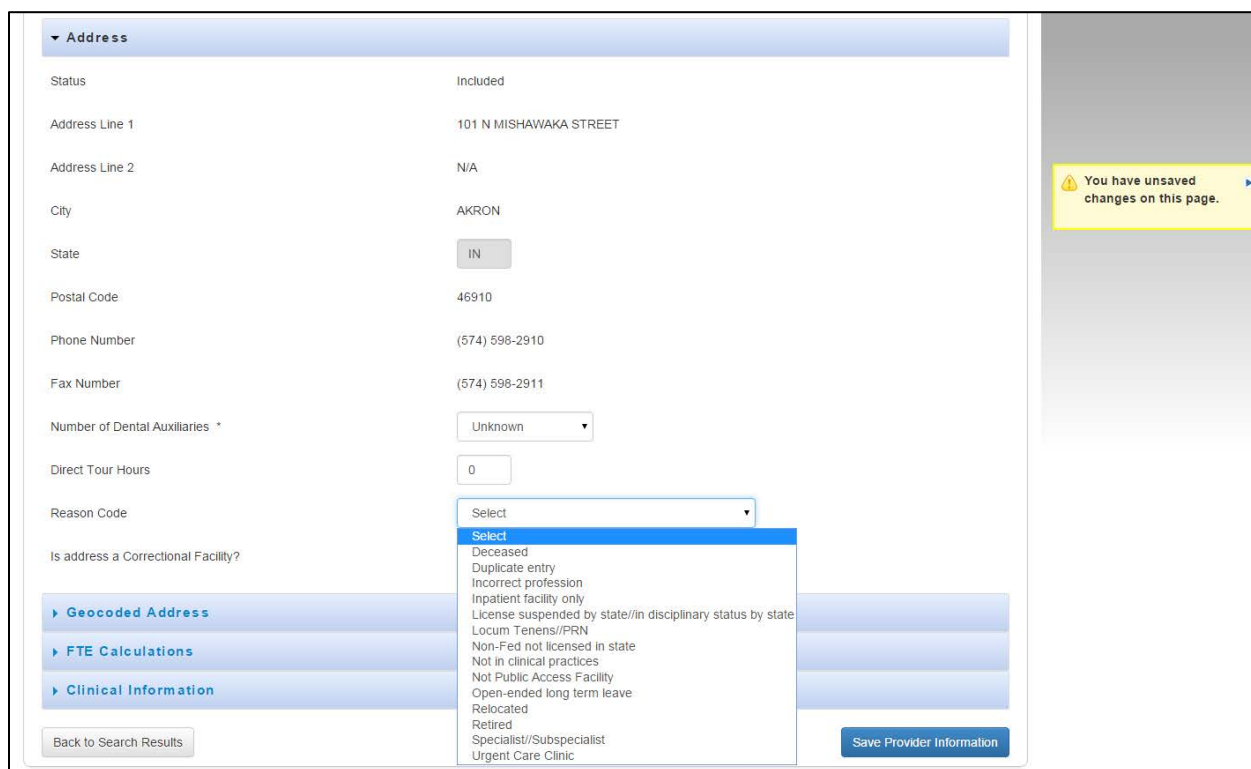


Figure 12 - Reason Code



Reason codes include:

- Deceased
- Duplicate entry
- Incorrect profession
- Inpatient facility only
- License suspended by state/in disciplinary status by state
- Locum Tenens/PRN
- Non-Fed not licensed in state
- Not in clinical practices
- Not Public Access Facility
- Open-ended long term leave
- Relocated
- Retired
- Specialist/Subspecialist
- Urgent Care Clinic
- Only reporting psychiatrists (option available only for the Mental Health discipline)
- Only reporting CMH (option available only for the Mental Health discipline)

## GEOCODED ADDRESS

This section illustrates additional geographical information returned by the geocoding service, using the primary address of practice found in the NPI file. All information under this grouping is read-only, except for the latitude and longitude fields.



▼ Geocoded Address

<b>1</b>	Address Successfully Geocoded	Yes
<b>2</b>	Latitude	<input type="text" value="41.0388590000"/>
	Longitude	<input type="text" value="-86.0282250000"/>
	State FIPS	18
	State Name	IN
	County FIPS	049
	County Name	Fulton
	Census Tract	18049953500
	MCD FIPS	1804933106
<b>3</b>	Match Level	01 - Address point

**4**

▶ FTE Calculations

▶ Clinical Information

Back to Search Results
Save Provider Information

Figure 13 – Geocoded Address

- |   |   |
|---|---|
| <b>1. Address Successfully Geocoded</b> | This indicates if the system has successfully geocoded the provided address or not.   |
| <b>2. Latitude and Longitude</b>        | These fields are prepopulated by the system if it found a Latitude and Longitude for the provided address. Users associated to the provider can override the given latitude and longitude by entering new values. |
| <b>3. Match Level</b>                   | This field indicates. If the user modifies the latitude and/or longitude the new match level would be 0 – User Override.  |
| <b>4. Address Map</b>                   | The map pinpoints the physical location of the provided address.  |





## USER NOTES

- If the NPI Primary Address could not be geocoded, the following message will be displayed as part of the “Geocoded Address” section: “Address Successfully Geocoded: No” The address will need to be updated in the NPI Primary file or updated by the user in order to collect an accurate address.
- If the primary address was unsuccessfully or incorrectly geocoded by the system, users have the option to manually geocode the address by dropping a pin on the provider’s location on the map or entering the latitude and/or longitude. Please note that PCOs will only be able to edit addresses for providers associated to their State.
- If the provider cannot be geocoded then it will not show up on the map and therefore not be counted in the area the PCO is trying to create the RSA.
- Reference the Index section below for a detailed description of the steps to handling geocoding exceptions.

## FTE CALCULATIONS

This section shows the FTE calculations for the “NPI Primary Address” location. The calculations are dynamic, with values updating after each save of edits that impact FTE calculations. All the values displayed are read-only.

▼ FTE Calculations			
Geographic HPSA	0.60	Low Income Homeless	0.00
Geographic High Needs HPSA	0.60	Low Income Migrant Farmworker	0.00
Homeless HPSA	0.00	Low Income Homeless Migrant Farmworker	0.00
Medicaid Eligible	0.00	Low Income Migrant Seasonal Worker	0.00
Native American	0.00	Low Income Migrant Seasonal Worker Homeless	0.00
Migrant Farmworker	0.00	Migrant Farmworker and Homeless	0.00
Migrant Seasonal Worker	0.00	Migrant Seasonal Worker and Homeless	0.00
Low Income	0.00		

Figure 14 - FTE Calculations

## BUSINESS RULES

- For any Low-Income calculation, enter in either or both of the following:
  1. “Yes” to Medicaid with a value great than 0 for Medicaid claims or %.  
Note that if both Medicaid claims and % have values greater than 0, the system will look at the Medicaid claims value.
  2. “Yes” to Sliding Fee Scale with a value greater than 0.
- The user may enter Tour Hours greater than 40, but the database will cap to 40 hours in order to calculate FTE.
- For dental FTE, only the Auxiliary Weight is applied to the 40 hour cap before the final FTE is calculated.
- The Auxiliary Weight is determined by the Dentist Age and Auxiliary Number entered.



## CLINICAL INFORMATION

This section lists the fields pertaining to clinical information specific for the “NPI Primary Address” location. Note that percentage values must be entered for each “Yes” response. The user must click “Save Provider Information” to save the information and update the FTE value. This section will also collect additional provider details regarding each address the provider is associated to.



**▼ Clinical Information**

Medicaid

Serves Medicaid?

Annual Medicaid Claims

Medicaid Patients %

Homeless

Serves Homeless?

Homeless %

Migrant Farmworkers

Serves Migrant Farmworkers?

Migrant Farmworker %

Native Americans

Serves Native Americans?

Native American %

Sliding Fee

Serves Sliding Fee Scale?

Sliding Fee Scale %

Migrant Seasonal Workers

Serves Migrant Seasonal Workers?

Migrant Seasonal Worker %

Is Physician an Intern or Resident?       NHSC Provider?

J1 Visa Waiver Program       Nursing Provider?

Federal Provider?

Figure 15 - Clinical Information

BUSINESS RULES



Please note that the following additional fields under Clinical Information are independent to the current address being updated:

- Is Physician an intern or Resident?
- J1 Visa Waiver Program?
- Federal Provider?
- NHSC Provider?
- Nursing Provider?

## 6. ADD NEW ADDRESS

The “Add New Address” tab offers the option to input up to 4 additional addresses for the provider. The additional address will be omitted from FTE Calculations until it is geocoded.



Overview **NPI Primary Address** Add a new Location

### Add a new Location

Last Updated: 09/10/2015 16:56

**Address**

1 Status N/A

Address Line 1 \*

Address Line 2

City \*

2 State

Postal Code \*

Phone Number

Fax Number

Direct Tour Hours

Reason Code

Is address a Correctional Facility?

**Geocoded Address**

3 Address Successfully Geocoded No

Latitude

Longitude

State FIPS N/A

State Name N/A


County FIPS N/A

County Name N/A

Census Tract N/A

MCD FIPS N/A

4 Match Level N/A



Map Satellite

Google

Map data ©2015 Google, INEGI Terms of Use Report a map error

▶ FTE Calculations

▶ Clinical Information

Add a new Location

Figure 16 - Add New Address



- 1. Status** This will display the 'Status' of the record. The default when adding a new address is 'N/A'.
- 2. State** The state is defaulted to the location of the PCO and is read-only.
- 3. Address Successfully Geocoded** This will display a Yes / No to signify the address was successfully geocoded.
- 4. Geocoded Match** This will display the geocoded address of the additional provider location, once it is geocoded.

## INSTRUCTIONS

1. Input the Address, City and Zip Code of the new location. (See Figure 17)
2. Provide phone number and fax number if available.
3. Update tour hours as necessary and provide a reason code.
4. Provide clinical information for the location if available.
5. Click [Save Provider Information](#) to create the new location. (See Figure 18)
6. Find the new address confirmation message and new location information under the newly created tab "Location 1." (See Figure 19)

Address Line 1 *	<input type="text"/>
Address Line 2	<input type="text"/>
City *	<input type="text"/>
State	<input type="text" value="IN"/>
Postal Code *	<input type="text"/>
Phone Number	<input type="text"/>
Fax Number	<input type="text"/>

Figure 17 - Required Information



NASR, SUHAYL

[Overview](#) [NPI Primary Address](#) [Add a new Location](#)

### Add a new Location

Last Updated: 10/14/2015 17:44

**▼ Address**

Status	N/A
Address Line 1 *	107 S. Indiana Avenue
Address Line 2	
City *	Bloomington
State	IN
Postal Code *	47405-7000
Phone Number	2542348765
Fax Number	
Direct Tour Hours	40
Reason Code	Select ▼
Is address a Correctional Facility?	Select ▼
Is address a State/County Mental Hospital?	Select ▼

**▶ Geocoded Address**

**▶ FTE Calculations**

**▶ Clinical Information**

**Add a new Location**

[Back to Search Results](#) [Save Provider Information](#)

Figure 18 - Add New Address





Figure 19 - Location 1

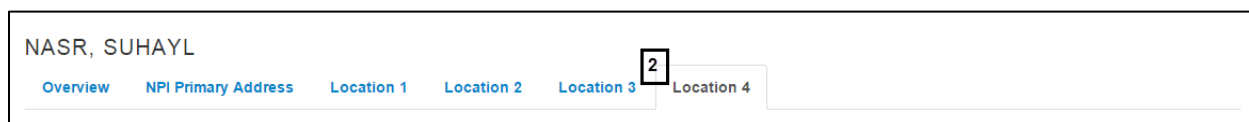


Figure 20 - Disabled "Add New Address"

- 1. Location 1** After clicking "Save Provider Information," the address will display on a new tab labeled "Location 1."
- 2. Location 2, 3 and 4** Each additional address will display in a new tab labeled "Location 2," "Location 3," and "Location 4."

## BUSINESS RULES

- Address Line 1, City, State and Zip Code are required to add a new address.(See Figure 16)
- The user may add up to 4 new locations, for a total of 5 locations including the NPI Primary Address. After the fourth address is submitted, the "Add New Address" tab will no longer be available. (See Figure 19)
- The new location will be geocoded immediately after the user selects the "Save Provider Information" button if the system found a strong enough match to the provided address. Refer to the "Geocoded Address" section on the "Location #" tab to find more information on its status.

## USER NOTES

- A new location cannot be deleted once it is submitted. To remove the address fully from FTE Calculations, users can either reduce Direct Tour Hours to 0 for that address or deactivate the address. Address deactivation will be covered in the next section.
- If needed, the user may add a provider address located in a different state.





## 7. DEACTIVATING AN ADDRESS

Under each address that has been added by the user, the system provides the option to deactivate an address that may no longer be needed for that provider.

The screenshot shows the 'Indiana Designations Provider Management' interface for provider 'NASR, SUHAYL'. The 'Providers' tab is selected. The 'Location 2' tab is active, showing a form for 'Location 2' with the following fields and values:

- Status: Included
- Address Line 1: 107 S. Indiana Avenue
- Address Line 2: (empty)
- City: Bloomington
- State: IN
- Postal Code: 47405-7000
- Phone Number: (254) 234-8765
- Fax Number: (empty)
- Direct Tour Hours: 40
- Reason Code: Select
- Is address a Correctional Facility?: Select
- Is address a State/County Mental Hospital?: Select

At the bottom of the form, there are three expandable sections: 'Geocoded Address', 'FTE Calculations', and 'Clinical Information'. A 'Back to Search Results' button is on the left, and a 'Deactivate Address' button (highlighted with callout 4) and a 'Save Provider Information' button are on the right.

Figure 21: Deactivate Address

- 1. PCO's State** State the PCO is responsible for.
- 2. State** The address being modified is within PCO's state.



**3. Reason Code** Reason code must be provided when deactivating or zeroing out an address.

**4. Deactivate Address** Select “Deactivate Address” button to deactivate the current address.

## BUSINESS RULES

- NPI Primary Address cannot be deactivated by the user.
- The address being deactivated must be within the PCO’s state.
- The user must provide a reason code when deactivating and address.

## INDEX

### Steps to resolve geocoding exceptions:

1. Search for locations that have not been geocoded successfully.
2. Delete the existing latitude and longitude and select the “Save Provider Information” button.
  - a) If its match level 3 or less, the latitude and longitude are accurate, and the components are also accurate, then the system has successfully geocoded the address.
  - b) If its match level 4 or higher, or the latitude and longitude aren’t accurate, or the components are incorrect, move on to the next steps.
3. Create a new location
4. Enter the correct address and save
5. Check your results:
  - a) If its match level 3 or less, the latitude and longitude are accurate, and the components are also accurate, then the system has successfully geocoded the address.
  - b) If its match level 4 or higher, or the latitude and longitude aren’t accurate, or the components are incorrect, move on to the next step.
6. Drag the pin to the correct location and save

