Primary Care Office (PCO) Portal: Shortage Designation Management

User Guide

Associated Resources:
Provider Management User Guide
Mapping Tool User Guide
Facility Form User Guide

November 2015

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SHORTAGE DESIGNATION MANAGEMENT SYSTEM OVERVIEW

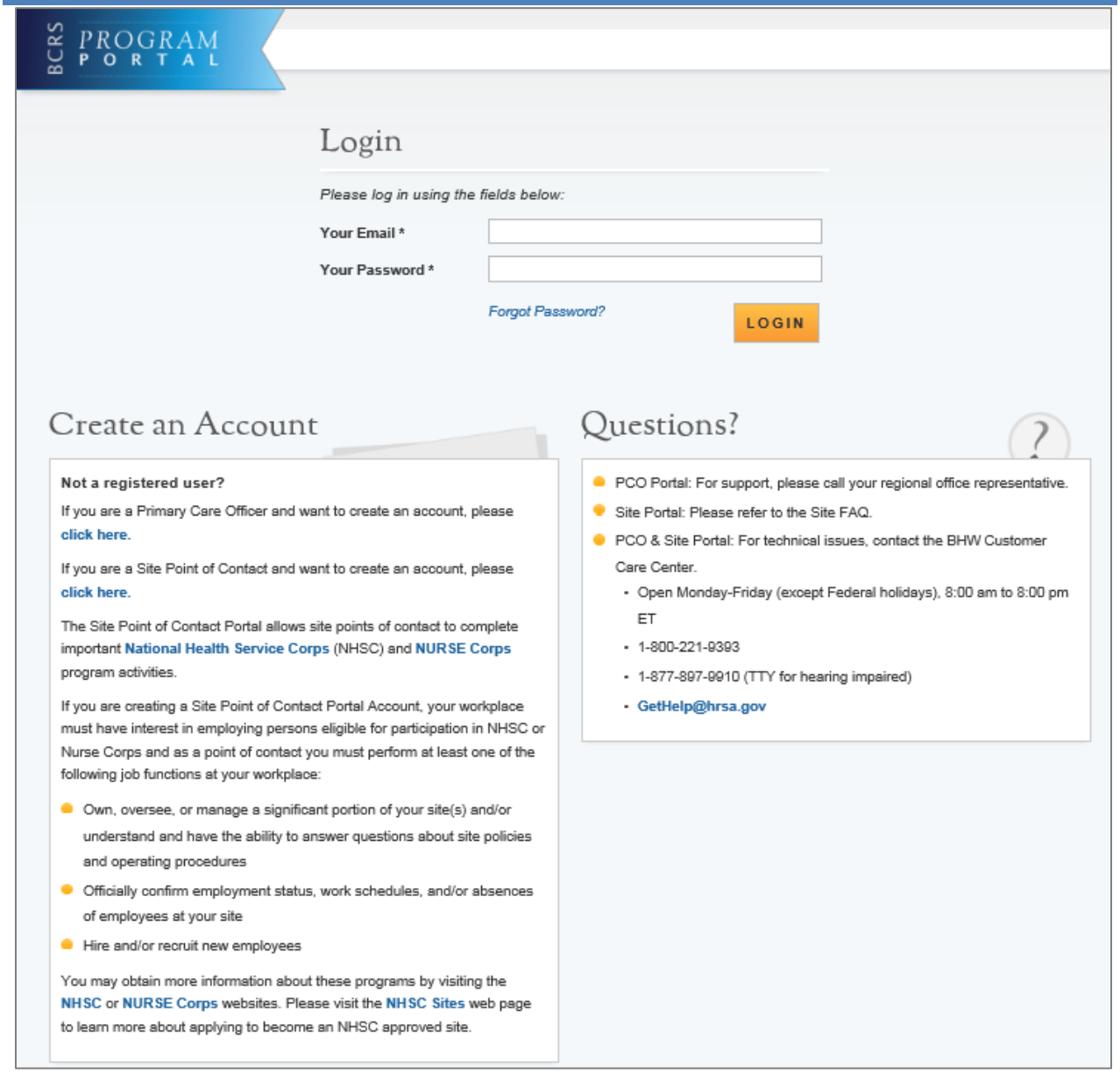
Goal: The Shortage Designation Management System is used to manage, apply, and update designation applications. The foundation of the Shortage Designation Management System comes from nationally sourced data and the policies and procedures of the Division of Shortage Designation and Policy (DPSD).

PCOs are able to complete the following:

- Search for existing designations
- View information about existing designations
- Create and Submit new designations
- Update existing designations
- Copy designations
- Create and Manage inquiries

Roles: The shortage designation role is required to be part of the PCO user account in order to have the access to the Shortage Designation Management System for Designations for their state. Please refer to the Create Account Section to gain the role and permission to perform the Designation Management functions.

I. LOG IN TO PORTAL



1. **Program Portal**: Clicking on the Program Portal logo will take the user to the Portal
2. **Forgot Password?**: The PCO can reset their password by selecting this link. It will ask a series of few questions and the user will receive an email to reset their password. Please see section Forgot Password.
3. **Login**: The PCO can login into the Provider Management by clicking this button after a valid email and password has been entered in the fields.
4. **Create an Account**: This section contains a number of resources for the PCO or a Site Administrator to create an account if an account is not already created for the user. The user can select the link “click here” on the first line for PCOs. If a PCO already has an account with

proper roles and permissions, they will be able to use the same credentials and can skip this section.

5. **Questions?**: This section contains contact information for any users who might have questions or need additional support.

ACCOUNT LOG-IN

To log into the account, enter in email address and password. If the PCO forgets their password, they can reset it by selecting the "Forgot your password?" link described below.

Important Notes:

- The user will be warned after their second failed log in attempt that their account will be locked on the next failed attempt.
- The account will be locked after the third invalid attempt. The PCO would then have to contact the BHW Call Center in order to unlock their account.

FORGOT PASSWORD

When a password is forgotten or needs to be reset, please select the (forgot password) link.

Instructions:

1. Select Forgot Password link. This will open another window that will request the user email address.
2. After selecting the Forgot Password link, the email address associated with the account must be entered and select "Next".
3. Upon confirmation that the email address entered is associated with an account that has been activated for the PCO Portal, it will be required to enter the correct answer for the accounts security question. Enter in the security question and select "Submit".
   Important Note: The security question and answer are entered during the create account process. If this is unknown, the Forgot Password process cannot proceed and the Customer Call Center will need to be contacted at 1-800-221-9393.
4. A Reset Password Email will be sent after submission of the correct security question answer. The Reset Password Email will have a link that must be used to reset the password.

Important Note: Passwords must have a minimum length of eight characters; shall not contain slang, jargon, or personal information; shall not contain all or part of your username; and must contain: at least one English upper-case character (A-Z), at least one English lower-case character (a-z), at least one numerical digit (0-9), and at least one special character (e.g. @, !, $, %). A character may not be repeated more than once in succession.

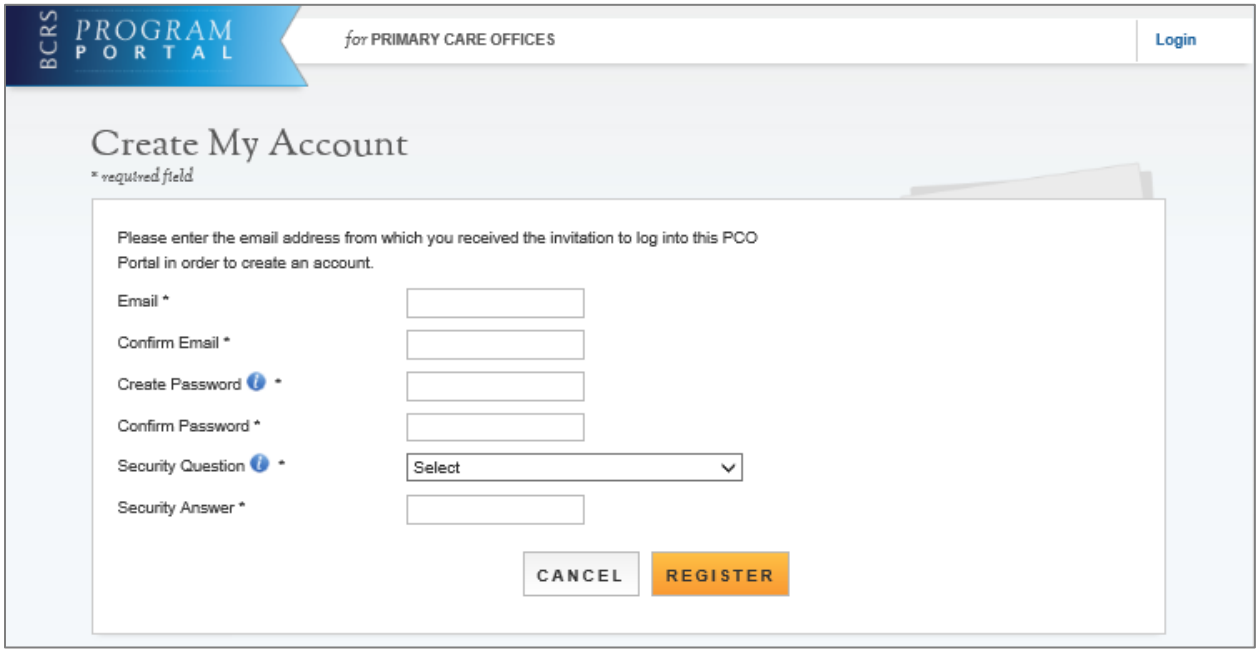
5. Return to the Portal Login page and enter in account email and new password

II. CREATE ACCOUNT

The Create Account process begins on the Portal Login page. Primary Care Offices must only use the create accounts for PCOs.

User Notes:

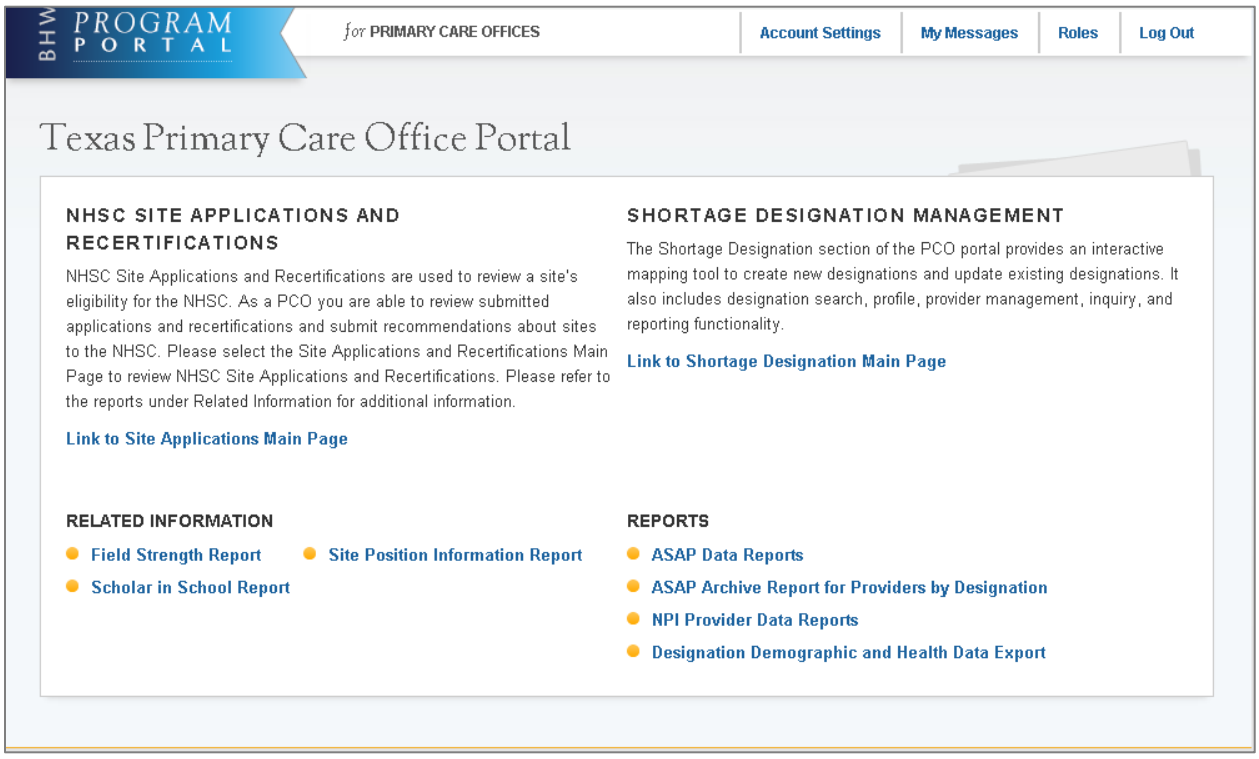
- PCO Accounts created prior to September 27th, 2014 must follow the create account process.
- The email address to be used as the username, the state, and the role must be communicated from the PCO to the Project Officer or Customer Call Center prior to creating the account otherwise the account will not be activated.
- The account will be activated after 24 hours. An account activation email may be sent prior to this 24 hours but the account will only be activate after 24 hours.



1. **Create My Account**: The six fields displayed are required to create an account. The user can select the information icon to get more information about password requirements or additional information about the field.
   Important Notes:
   - The email used will serve as email user name for Portal login.
   - The Security Question and Answer must be easily remembered in order to be used as part of the Forgot Password process.
2. **Cancel**: The PCO can click on this button and be taken to the Portal page.
3. **Register**: After entering all the required fields, the PCO can click on the "Register" button to register their account.
4. **Login**: PCO can login to the account after 24 hours.

III. PCO PORTAL LANDING PAGE (OVERVIEW)

The purpose of the PCO Portal Landing page is to give the PCO access to both the NHSC Site Applications and Recertifications and the Shortage Designation Program.

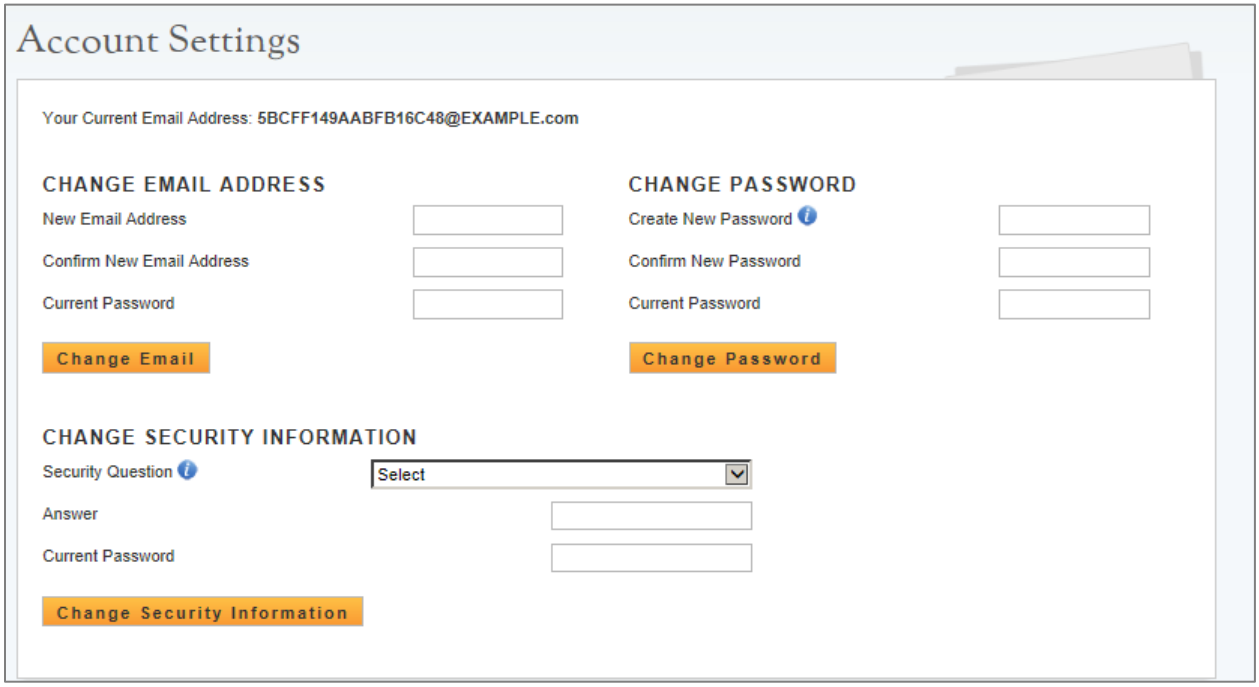


1. **NHSC Site Applications and Recertifications**: This section contains a number of tools for the site administrator as well as support contact information and a summary of all open requests. If the site administrator has either submitted an application for a site or is a POC at a site which has an application pending, those applications will appear here.
2. **Program Portal**: Clicking on the Program Portal logo will take the user to the Portal
3. **Account Settings**: The account setting will allow the PCO to manage and update security information as well as email and password information
4. **My Messages**: The PCO can view messages. This functionality will not be available in September 2014 release but will be available in future release.
5. **Roles**: The PCO can view the roles associated with the user account.
6. **Log Out**: The PCO can log out of the PCO Portal here.
7. **Shortage Designation Program**: This section contains information about the Shortage Designation Provider Management. It allows PCOs to manage, review, and update the provider information as part of the designation application process.
   Important Notes:
   - Only PCO with the Shortage Designation Program role will access to this.
   - The PCO will see only their designated state.
8. **Shortage Designation Reports**: There are now 4 reports available:

a. ASAPS Archive Designations Report: Please see next section for more details on this report.
b. ASAPS Archive Report for Providers by Designation: Please see next section for more details on this report.
c. NPI Provider Data Report: The NPI Provider Data Report is an exportable file of all the provider information associated with the PCO state.
d. Designation Demographic and Health Data Export: The Designation Demographic and Health Data Export is an exportable file for all associated information broken down by designation for all designations in the PCO state.

ACCOUNT SETTINGS

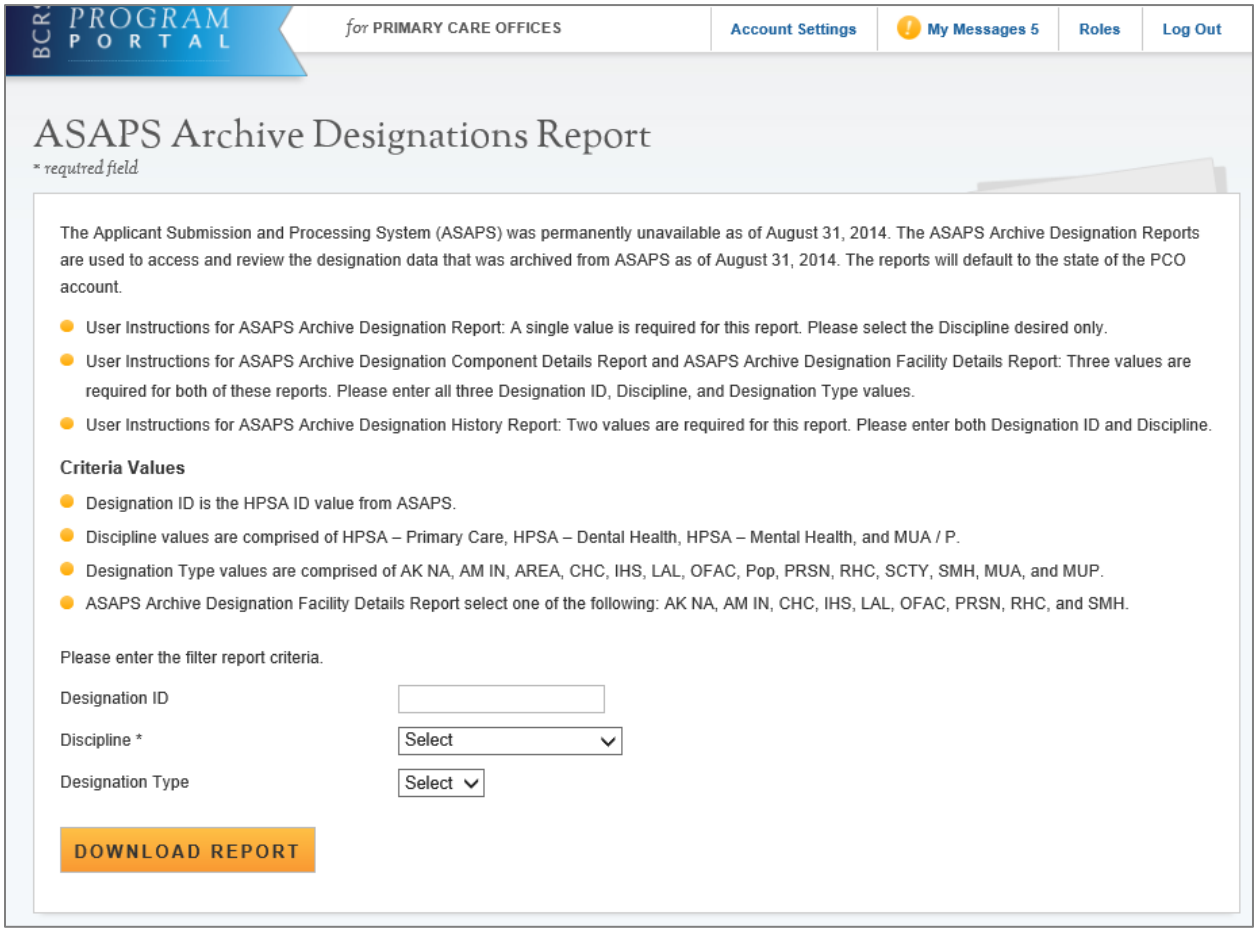
The Account Settings page allows can be used to update security information as well as email and password information.



1. **Change Email Address**: This allows the user to change the email address which they log-in with.
2. **Change Password**: PCO can change their password on this section
3. **Change Security Information**: PCO can change the security information through these steps.

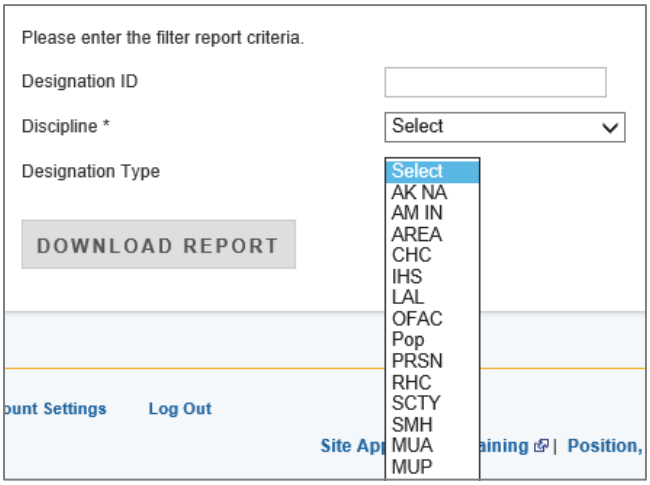
IV. ACCESSING THE ASAPS ARCHIVE DESIGNATIONS REPORTS

The ASAPS Archive Designation Report provides detailed designation information from ASAPS as of August 31st, 2014. The ASAPS Archive Designation Report is comprised of 4 reports. In order to review the information that is part of each unique report, there are specific criteria that need to be selected. The reports will default to the state of the PCO account.



1. **User instructions:**
   Each report requires a different combination of selection to be entered.
   a. Designation Report requires a Discipline.
   b. Designation Component Details Report requires Designation ID, Discipline, and Designation Type.
   c. Designation Facility Details Report requires Designation ID, Discipline, and Designation Type.
   d. Designation History Report requires Designation ID and Discipline.
2. **Criteria values:**
   a. Designation ID value must be an exact match to the HPSA ID as reported in ASAPS. If a match cannot be identified, a blank report will be reflected.

b. Discipline values are a drop down and one value can be selected at a time. These are values are: HPSA – Primary Care, HPSA – Dental Health, HPSA – Mental Health, and MUA/P.
c. Designation Type values are a drop down and one value can be selected at a time. These values are: AK NA, AM IN, AREA, CHC, IHS, LAL, OFAC, POP, PRSN, RHC, SCTY, SMH, MUA, and MUP. These values are based off the ASAPS Designation Types.
d. Designation Facility Details Report requires one of the following: AK NA, AM IN, CHC, IHS, LAL, OFAC, PRSN, RHC, and SMH.

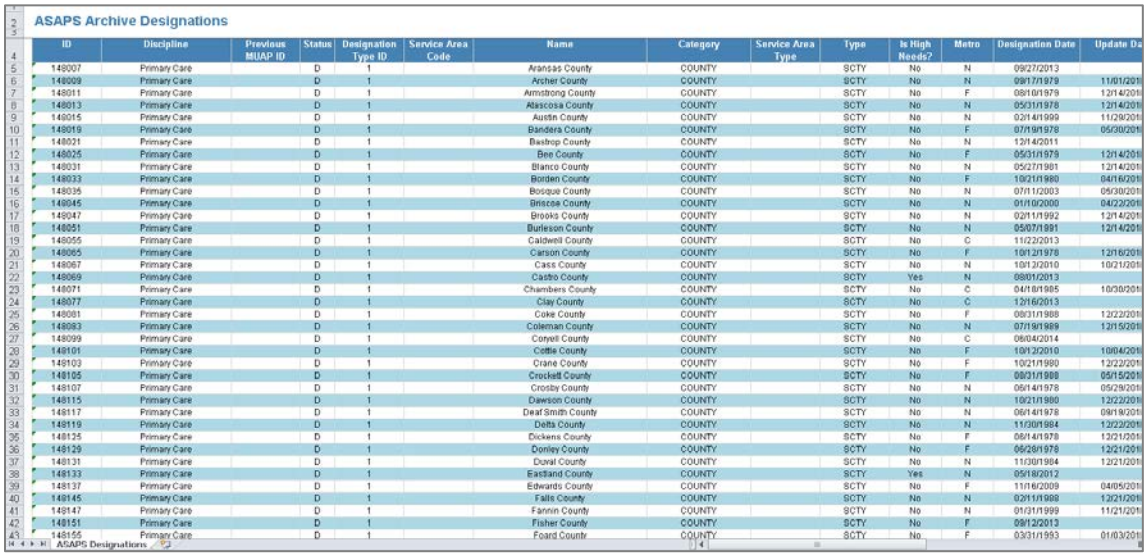


3. **Report criteria selection:**
When starting a new report selection, the PCO must follow the User Instruction to understand which criteria selection should be entered. If the combination of criterion entered does not match a report or does not match information from ASAPS, the report will be blank. The report will open in another window in excel.

ASAPS ARCHIVE DESIGNATIONS REPORT

The Designations Report requires a Discipline, only, to be generated. This report is a detailed report of all designation types for the discipline selected.

Example of an Archive Designation Report:



ASAPS Archive Designations

ID	Discipline	Previous MUAP ID	Status	Designation Type ID	Service Area Code	Name	Category	Service Area Type	Type	Is High Needs?	Metro	Designation Date	Update Da
148007	Primary Care		D	1		Aransas County	COUNTY		SCTY	No	N	09/27/2013	
148009	Primary Care		D	1		Archer County	COUNTY		SCTY	No	N	09/17/1979	11/01/201
148011	Primary Care		D	1		Armstrong County	COUNTY		SCTY	No	F	08/10/1978	12/14/201
148013	Primary Care		D	1		Atascosa County	COUNTY		SCTY	No	N	05/31/1978	12/14/201
148015	Primary Care		D	1		Austin County	COUNTY		SCTY	No	N	02/14/1999	11/29/201
148019	Primary Care		D	1		Bandera County	COUNTY		SCTY	No	F	07/19/1978	05/30/201
148021	Primary Care		D	1		Bastrop County	COUNTY		SCTY	No	N	12/14/2011	
148025	Primary Care		D	1		Bee County	COUNTY		SCTY	No	F	05/31/1979	12/14/201
148031	Primary Care		D	1		Blanco County	COUNTY		SCTY	No	N	05/27/1981	12/14/201
148033	Primary Care		D	1		Borden County	COUNTY		SCTY	No	F	10/21/1980	04/16/201
148035	Primary Care		D	1		Bosque County	COUNTY		SCTY	No	N	07/11/2003	05/30/201
148045	Primary Care		D	1		Briscoe County	COUNTY		SCTY	No	N	01/10/2000	04/22/201
148047	Primary Care		D	1		Brooks County	COUNTY		SCTY	No	N	02/11/1992	12/14/201
148051	Primary Care		D	1		Burleson County	COUNTY		SCTY	No	N	05/07/1991	12/14/201
148055	Primary Care		D	1		Caldwell County	COUNTY		SCTY	No	C	11/22/2013	
148065	Primary Care		D	1		Carson County	COUNTY		SCTY	No	F	10/12/1978	12/16/201
148067	Primary Care		D	1		Cass County	COUNTY		SCTY	No	N	10/12/2010	10/21/201
148069	Primary Care		D	1		Castro County	COUNTY		SCTY	Yes	N	08/01/2013	
148071	Primary Care		D	1		Chambers County	COUNTY		SCTY	No	C	04/18/1985	10/30/201
148077	Primary Care		D	1		Clay County	COUNTY		SCTY	No	C	12/16/2013	
148081	Primary Care		D	1		Coke County	COUNTY		SCTY	No	F	08/31/1988	12/22/201
148083	Primary Care		D	1		Coleman County	COUNTY		SCTY	No	N	07/19/1989	12/15/201
148099	Primary Care		D	1		Coryell County	COUNTY		SCTY	No	C	06/04/2014	
148101	Primary Care		D	1		Cottle County	COUNTY		SCTY	No	F	10/12/2010	10/04/201
148103	Primary Care		D	1		Crane County	COUNTY		SCTY	No	F	10/21/1980	12/22/201
148105	Primary Care		D	1		Crockett County	COUNTY		SCTY	No	F	08/31/1988	05/15/201
148107	Primary Care		D	1		Crosby County	COUNTY		SCTY	No	N	06/14/1978	05/29/201
148115	Primary Care		D	1		Dawson County	COUNTY		SCTY	No	N	10/21/1980	12/22/201
148117	Primary Care		D	1		Deaf Smith County	COUNTY		SCTY	No	N	06/14/1978	09/19/201
148119	Primary Care		D	1		Delta County	COUNTY		SCTY	No	N	11/30/1984	12/22/201
148125	Primary Care		D	1		Dickens County	COUNTY		SCTY	No	F	06/14/1978	12/21/201
148129	Primary Care		D	1		Donley County	COUNTY		SCTY	No	F	06/26/1978	12/21/201
148131	Primary Care		D	1		Duval County	COUNTY		SCTY	No	N	11/30/1984	12/21/201
148133	Primary Care		D	1		Eastland County	COUNTY		SCTY	Yes	N	05/18/2012	
148137	Primary Care		D	1		Edwards County	COUNTY		SCTY	No	F	11/16/2009	04/05/201
148145	Primary Care		D	1		Falls County	COUNTY		SCTY	No	N	02/11/1998	12/21/201
148147	Primary Care		D	1		Fannin County	COUNTY		SCTY	No	N	01/31/1999	11/21/201
148151	Primary Care		D	1		Fisher County	COUNTY		SCTY	No	F	09/12/2013	
148155	Primary Care		D	1		Foard County	COUNTY		SCTY	No	F	03/31/1993	01/03/201

ASAPS Designations

The Designation Report has the following fields that will reflect the information from ASAPS as of August 31st, 2014 for all designations in the state.

Field	Discipline: MUA / P	Discipline: Primary Care, Dental Health, or Mental Health
ID	1	6019990000
Discipline	Primary Care	Dental Health
Previous MUAP ID		
Status	D	D
Designation Type ID		6
Service Area Code		0115
Name	Lane County	Low Income - Lane County
Category	County	POP-LI
Service Area Type	PC	
Type	MUA	Pop
Is High Needs?		Yes
Metro	C	N
Designation Date	1/1/1994	09/30/1996
Update Date	1/1/1994	11/06/2013
Last Update Date		11/06/2013
PCFTEs		
None Fed PCFTEs		5.1
FTE	15	5.1
Population	46798	41147
Pop/PCFTEs Ratio		8068:1
Score		15

IMU Score	52.9	
Number Short		5.19
Under Served		20747
IMR		8.59
LBW Rate		8.47
100% Poverty		17202
Travel Distance		71
Travel Time		97
Region		4
State Code	AL	AL
County Name		Lane
Census Version	Census 2000	2004

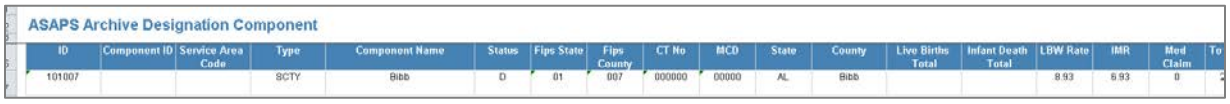
Important Notes:

1. Certain fields are specific to the MUA / MUP selection and will be blank when a report is generated for Primary Care, Mental Health, or Dental Health discipline.
2. The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
3. No changes can be made to this information.

ASAPS ARCHIVE DESIGNATION COMPONENT DETAILS

The Designation Component Details Report and Facility Details require a Designation ID, Discipline, and Designation Type to be generated. This report is a detailed report for a single designation.

An example of an Archive Designation Component Details Report:



The Designation Component Details Report has the following fields that will reflect the information from ASAPS as of August 31st, 2014 for a single designation.

Important Notes:

- Certain fields are specific to the different Discipline and Designation Type selections and will be blank when a report is generated without those values.

- The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
- No changes can be made to this information.

Field	Example
ID	707001
Component ID	
Service Area Code	
Type	SCTY
Component Name	Lane
Status	D
FIPS State	1
Fips County	7
CT No	0
MCD	0
State	AL
County	Lane
Live Births Total	
Infant Death Total	
LBW Rate	8.93
IMR	6.93
Med Claim	0
Total Pop	21723
Pop 65	2759
Pop A	17
Pop I	62
100% Poverty	3786
200% Poverty	8261
Tourist	0
Migrant	0
Designation Descriptor	1
Region Code	4
PC FTEs	4
Pop/ FTEsRatio	
Designation Date	5/20/1978
Update Date	6/22/2011
Last Update Date	3/19/2014
Component Description	New Component

ASAPS ARCHIVE DESIGNATION HISTORY REPORT

The Designation History Report requires Designation ID and Discipline. This report is a history for a single designation.

An example of an ASAPS Archive Designation History Report

ASAPS Archive Designation History

HPSA ID	HPSA Name	Designation Date	Update Date	Last Update Date	HPSA Status	HPSA Score	Decision	State
101007	Bibb	05/20/1978	06/22/2011	06/22/2011	D	16		AL
101007	Bibb County	05/20/1978	03/19/2014	06/22/2011	D	16	Name/Status/Date/Score	AL
101007	Bibb	05/20/1978	12/26/2006	12/26/2006	D	16		AL
101007	Bibb	05/20/1978	06/22/2011	12/26/2006	D	16		AL

The Designation History Report has the following fields that will reflect the information from ASAPS as of August 31st, 2014 for a single designation.

Important Notes:

- The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
- No changes can be made to this information.

ASAPS ARCHIVE DESIGNATION FACILITY DETAILS REPORT

The Facility Details Report requires a Designation ID, Discipline, and Designation Type to be generated. This report is a detailed report for a single designation.

An example of a Facility Details Report:

ASAPS Archive Designation Facility Details

HPSA ID	Facility ID	Facility Name	Facility Type	Address	City	State	Zip	County	County Code	Metropolitan Type	Intersected HPSA	Intersected HPSA ID	Intersected HPSA Score	Type	Security Level	Average Inmates/year ≥ 250	Average Inmates/year	Average Length of Stay (ALOS)	Routine Intake Exams Performed	Average New Inmates per year	Intermex Computation Equation	
1010990164	23	Federal Correctional Institution - Talladega	Federal	565 Bart Renfroe Road	Talladega	AL	35160	Talladega	121	Nonmetropolitan			0	Federal	Medium	Yes	1039	3662	Yes	660	ALOS equal or greater than 365 days; Intake Exams	

The Facility Details Report has the following fields for Designation TYPE: PRSN that will reflect the information from ASAPS as of August 31st, 2014 for a single designation.

Important Notes:

1. Designation Facility Details Report requires one of the following: AK NA, AM IN, CHC, IHS, LAL, OFAC, PRSN, RHC, and SMH.
2. Certain fields are specific to the different Designation Type selections and will be blank when a report is generated without those values.
3. The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
4. No changes can be made to this information.
5. The Facility Details Report has the following fields for Designation Type: AK NA, AM IN, CHC, HIS, LAL, OFAC and RHC that will reflect the information from ASAPS as of August 31st, 2014 for a single designation.

Field	PRSN: Example
HPSA ID	2029990167
Facility ID	23
Facility Name	Federal Correctional Institution - Lane
Facility Type	Federal
Address	565 East Froeren Road
City	Lane
State	AL
Zip	35160
County	Lane
County Code	121
Metropolitan Type	Nonmetropolitan
Intersected HPSA	
Intersected HPSA ID	
Intersected HPSA Score	0
Type	Federal
Security Level	Medium
Average Inmates/year ≥ 250	Yes
Average Inmates/year	1039
Average Length of Stay (ALOS)	3652
Routine Intake Exams Performed	Yes
Average New Inmates per year	960
Internee Computation Equation	ALOS equal or greater than 365 days; Intake Exams done and Average New Inmates known.
Internees	1327
FTE Practitioners Serving Facility	0
Internee-to-Provider Ratio	1327:0
Degree of Shortage	1
Facility Score	12

The Facility Details Report has the following fields for Designation Type: AK NA, AM IN, CHC, HIS, LAL, OFAC and RHC that will reflect the information from ASAPS as of August 31st, 2014 for a single designation.

Important Notes:

1. Designation Facility Details Report requires one of the following: AK NA, AM IN, CHC, IHS, LAL, OFAC, PRSN, RHC, and SMH.
2. Certain fields are specific to the different Designation Type selections and will be blank when a report is generated without those values.
3. The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
4. No changes can be made to this information.

Field	Example
HPSA ID	7369993616
Facility ID	1304
Facility Name	Woodhull Mental Health Center
HPSA Type	
Clinics at Facility	
Address	760 BROADWAY
City	BROOKLYN
State	NY
Zip	11206-5317
County	Kings
Longitude	-73.94164
Latitude	40.70052
State FIPS	36
County FIPS	047
Census Tract	028501
MCD Code	10022
MCD Name	Brooklyn borough
Original Designation Date	
Current Designation Date	7/25/2012
FTE	0

The Facility Details Report has the following fields for Designation TYPE: SMH that will reflect the information from ASAPS as of August 31st, 2014 for a single designation.

Important Notes:

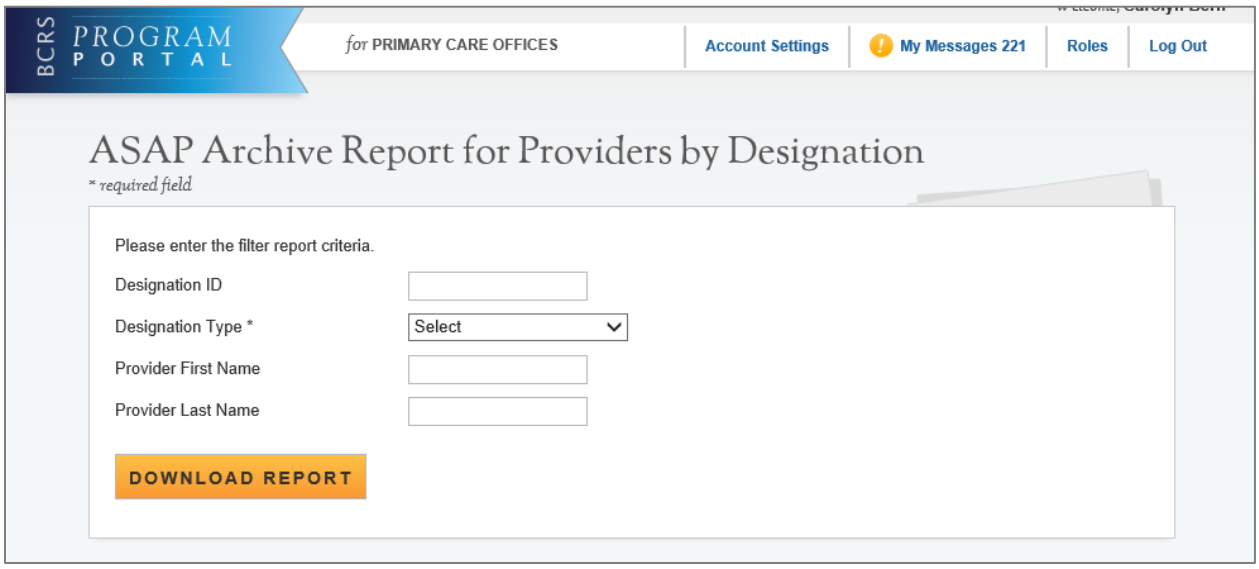
1. Designation Facility Details Report requires one of the following: AK NA, AM IN, CHC, IHS, LAL, OFAC, PRSN, RHC, and SMH.

2. Certain fields are specific to the different Designation Type selections and will be blank when a report is generated without those values.
3. The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
4. No changes can be made to this information.

Field	Example:AK NA, AM IN, CHC, IHS, LAL, OFAC and RHC
HPSA ID	736999360Z
HPSA Status	D
Facility ID	7360000168
Facility Name	Livingston County Mental
Facility Type	OFAC
Clinics at Facility	1
Address	4600-4630 Millennium Drive
City	Geneseo
State	NY
Zip	14454
County	Livingston
County Code	51
HPSA Facility Serves (Name/ID)	Southern Livingston
Facility is Public or Non-Profit	Yes
Metropolitan Type	Nonmetropolitan
Within 30 minutes of HPSA and facility is accessible to residents of HPSA (i.e, no socioeconomic differences)	Yes
More than 50% of facility's services are being provided to residents of a HPSA	No
To	Southern Livingston
Distance By	Auto
Source	Google Maps
Map Type	Other
Other	Google
Interstate Miles	16
Interstate Minutes	21
Primary Miles	7
Primary Minutes	12
Secondary Miles	0
Secondary Minutes	0
Total Miles	23
Total Minutes	32
> 8000 outpatient visits per year per FTE of physicians	No
Number of Outpatients	3034
FTE	0.3
Outpatients FTE	10113
Excessive usage (> 35%) of emergency room facilities for routine care	No
Waiting time for appointments for established patients (days)	
Waiting time for appointments for new patients (days)	0
Facility waiting time for patients with appointments (hours)	0
Facility waiting time walk-in patients (hours)	0

V. ASAPS ARCHIVE PROVIDER REPORT

The ASAPS Archive Report for Providers allows PCOs to search for Providers by a Designation ID, by Primary Care, Dental Health, Mental Health, or MUA/P, or by First and Last Name.



1. **Designation ID** value must be an exact match to the HPSA ID as reported in ASAPS. If a match cannot be identified, a blank report will be reflected
2. **Designation Type** values are a drop down and one value can be selected at a time. These are values are: HPSA – Primary Care, HPSA – Dental Health, HPSA – Mental Health, and MUA/P.
3. **Provider First Name** is a text field.
4. **Provider Last Name** is a text field.

USER INSTRUCTIONS FOR ASAPS ARCHIVE PROVIDER REPORTS

Each report requires a different combination of selection to be entered.

1. Provider by Designation ID requirements a Designation ID and Designation Type (PC, MH, DH, or MUA/P).
2. Provider by First and Last name requires Designation Type (PC, MH, DH, or MUA/P) and First and Last Name.
3. Provider by Designation Type requires Designation Type (PC, MH, DH, or MUA/P).

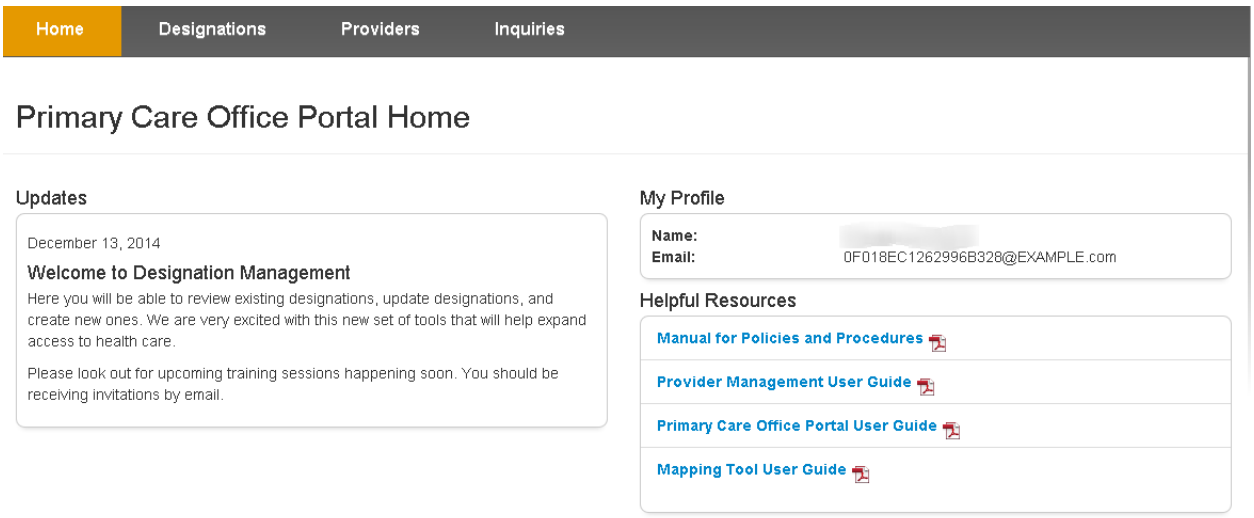
Field	Example
Designation ID	8080001
Designation Date	05/20/1978
Designation Status	D
Provider ID	2272378
Provider Type	PCP
Provider Status	Active
First Name	JOHN
Middle Name	M
Last Name	SANSBURY
Suffix	JR
License Number	
Specialty Code	FP
Resident/ Intern	No
J1 Visa Holder	No
Federal Employee?	No
NHSC Employee?	No
MD/DO Type	M
Does the physician have hospital privileges?	No
Includes Hospital Time	No
Sources from which the address was pulled	State
Address Line 1	
Address Line 2	277 MIERSON AVE
City	Lane
State	AL
Zip Code	35042
X-Coordinates, Latitude	-87.1467
Y-Coordinates ,Longitude	32.9487
Office Visits	0
New Patient Wait Time (Hours)	TRUE
Current Patient Wait Time (Hours)	0
New Average Patient Wait (Hours)	0
Current Patient Average	0
Homeless %	0
Medicaid Patient %	0
Migrant Farmworker %	0
Native American %	0
Sliding Fee Scale %	0
Migrant Seasonal Farmworker %	0
Medicaid Claims	0
Does physician accept new patients?	TRUE
Tour hours in direct patient care for this address	40
Other Population %	0
FTE for Provider at Address	1
Provider Address Status	Active
Last Record Update	5/13/2011 5:12:22 PM
Comment Field	Provider 20001
Age	
Number of Dental Auxiliaries	
FIPS County	007
Fips State	01
CT	000000
MCD Code	00000
DOB	
Ref. DOB	
Low Income FTE	0
Prov Addr Info ID	8033139
CA Name	

Important Notes:

1. The ASAPS Archive Provider report allows the PCO to view provider data by different levels. The Fields will remain the same for any level generated.
2. The provider may be listed for a designation because it was either in the rational service area or the contiguous area.
3. Certain fields are specific to the different Discipline and Designation Type selections and will be blank when a report is generated without those values.
4. The fields will display the information that was in ASAPS as of August 31st, 2014. No edits or changes have been made.
5. No changes can be made to this information.

VI. ACCESSING THE SHORTAGE DESIGNATION MAIN PAGE

The purpose of the Shortage Designation Main Page is for the PCO to view important updates, helpful resources and access designations, provider management, inquiries and report functionalities. The user can access this page by selecting "Link to the Shortage Designation Main Page" on the main portal homepage.



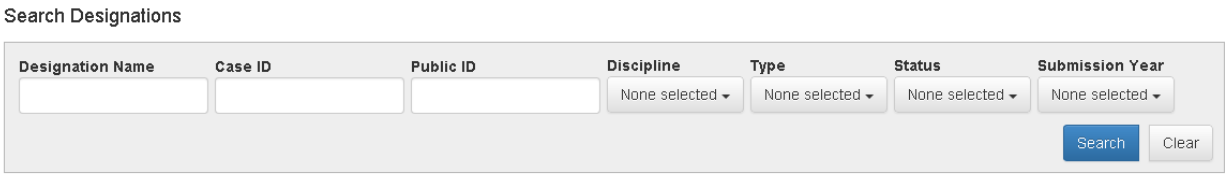
1. **Navigation Panel**: The user may navigate to other sections of the PCO Portal using this toolbar.
2. **Updates**: This section will provide the user with new information and updates pertaining to Shortage Designation Management.
3. **My Profile**: This section will list the name and email address of the user.
4. **Helpful Resources**: This section will provide the user with resources on the policies and procedures of the new Shortage Designation Management System.

VII. SEARCHING FOR DESIGNATIONS

The user will have access to search and see details about all existing designations as well as those in progress for their specific state. The user can access the search through the extranet homepage by selecting the "Designations" tab on the navigation panel. The user will be able to search designations created with the Mapping Tool as well as all designations migrated from ASAPS.

Once on the Designation Search page, the user can search using the following columns:

- Designation Name
- Case ID
- Public ID
- Discipline
- Status
- Year



1. **Designation Name**: This name is entered by the user on the Mapping Tool Landing page or the name migrated directly from ASAPS.
2. **Case ID**: This number is generated once the RSA is saved on the Mapping Tool. This number can be used to search for a specific designation application.
3. **Public ID**: This number is the official ID of approved Designations. The IDs of designations migrated from ASAPS will be now be the Public ID in SDMS.
4. **Discipline**: User can choose from the following multi-select options
    a. Primary Care
    b. Mental Health
    c. Dental Health
5. **Type**: User can choose from the following multi-select options
    a. HPSA
    b. MUA/P
    c. Auto-Facility
    d. OFAC
    e. Correctional Facility
    f. State/County Mental Hospital
6. **Status**: User can choose from the following multi-select options
    a. In Progress
    b. Submitted-Designation
    c. Submitted-Withdrawal

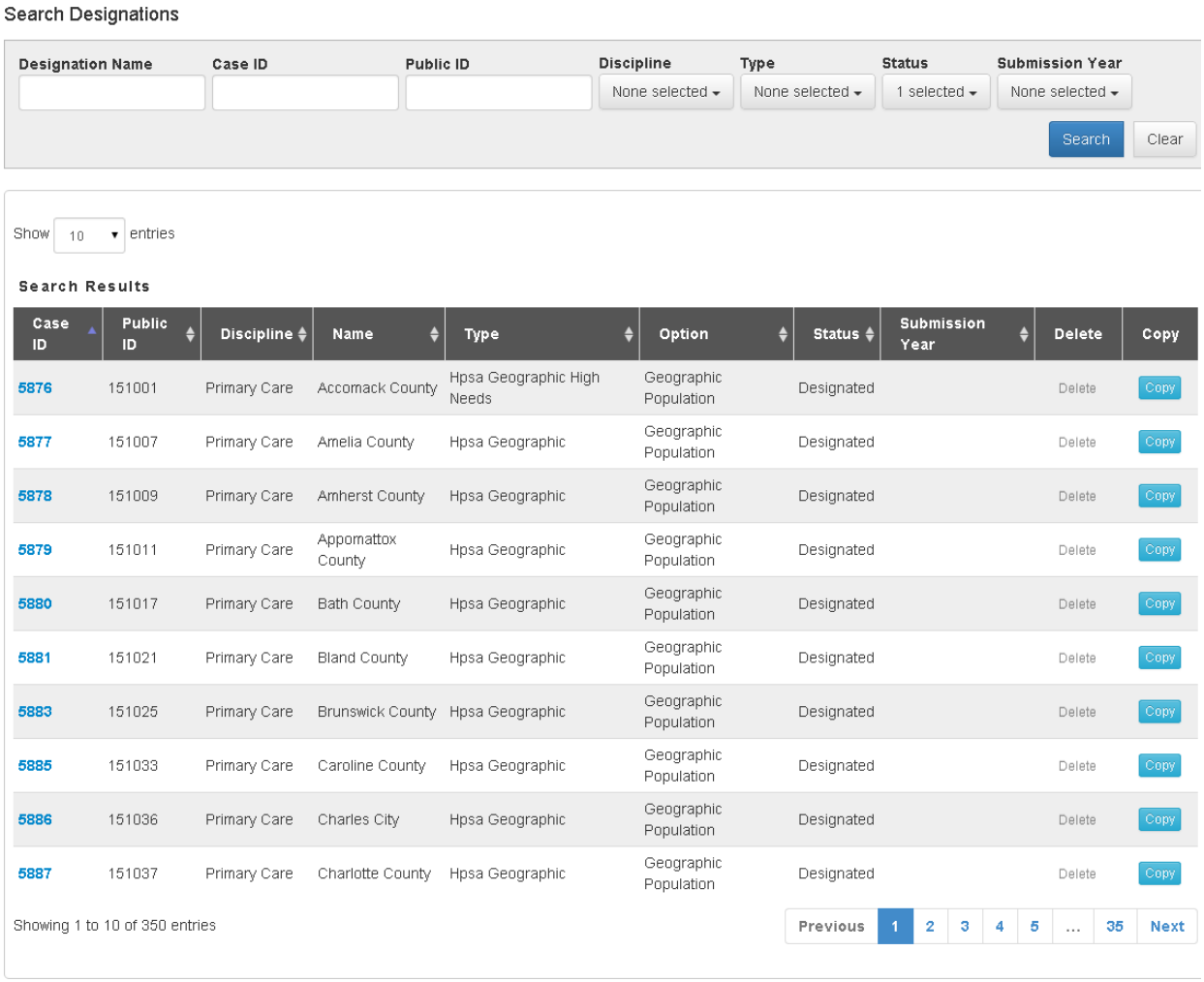
d. Under Review-Withdrawal
e. Under Review-Designation
f. Not Approved
g. Designated
h. Proposed for Withdrawal
i. Withdrawn
j. Replaced
k. Reinstated

7. **Year**: This field represents the designation submission year.

Business Rules:

- The user is must choose at least one search criteria in order for the system to display search results.
- If the user does not complete any search criteria and selects the “Save” button, the following warning will appear: “You must fill in at least one search field.”

The system will display search results in a table as shown below and will automatically be sorted by Case ID. The user can sort by any of the column headers by selecting the arrows to the right.



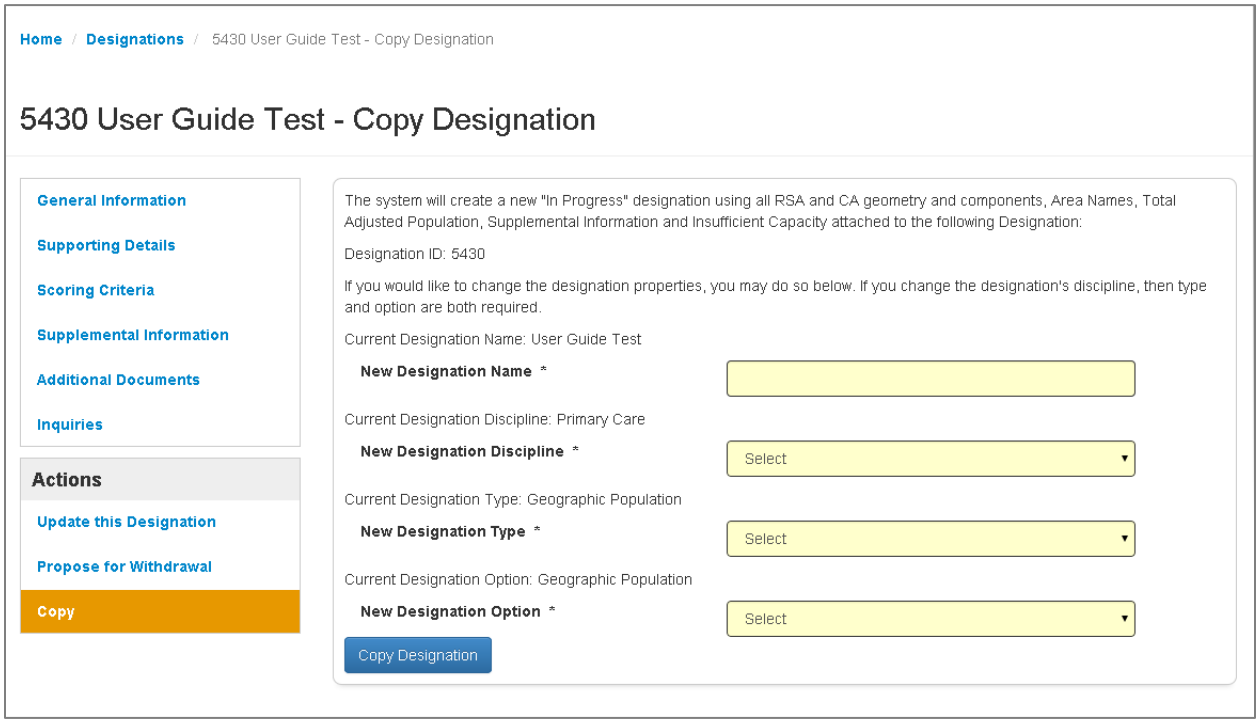
1. **Show # Entries**: The user can use this drop down to select the number of search results that appear per page. The system will automatically default to 10 search results per page. Once the new number is selected, the system will automatically update the search results. The user can select from the following options:
    a. 10
    b. 25
    c. 50
    d. 100
2. **Case ID**: This field is hyperlinked and allows the user to access the Designation profile.
3. **Public ID**: This read only field will display the approved ID of the designation that will be accessible to the public.
4. **Discipline**: This read only field will display either the discipline(s) the user has selected in the search or all disciplines if this search criterion wasn't completed.
5. **Name**: This read only field will display the name of the designation.
6. **Type**: This read only field will display the designation type.
7. **Option**: This read only field will display the designation option.

8. **Status**: This read only field will display the status(s) the user has selected in the search or all statues if this search criterion wasn't completed.
9. **Submission Year**: This read only field will display the user's selection in the search or all years applicable if this search criterion wasn't completed.
10. **Delete**: This button will only be enabled for a designation with an in-progress status and would allow users to delete designations that have not been submitted for review. Please see section 6b for more specific details on this action.
11. **Copy**: This button will be enabled for all HPSA and MUAP designations in all statues, except Withdrawn, and will allow the user to copy a designation. Please see section 6a for specific details on this action.
12.

The user can move to the next page by selecting the page number or the next button. If the user would like to go back to a page, select the page number or the previous button.

COPYING A DESIGNATION

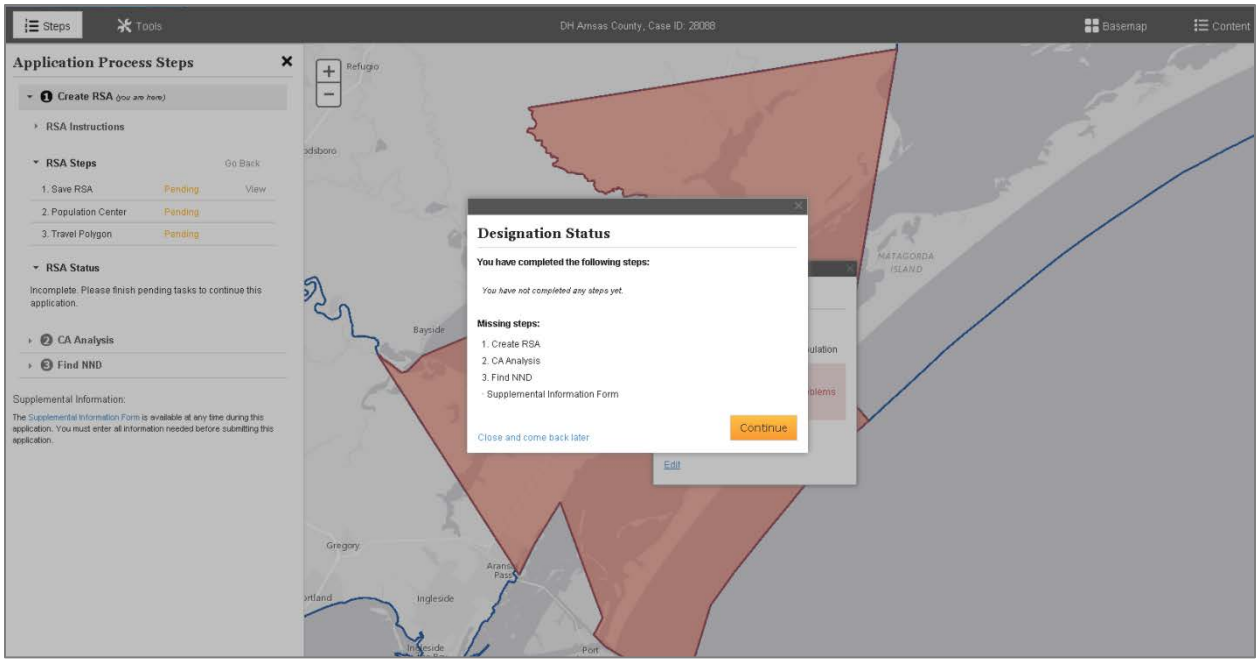
The user has the ability to copy a HPSA or MUAP designation with any status to create a new in progress using the same RSA and CA geometries and components, Area Names, Total Adjusted Population, Supplemental Information and Insufficient Capacity associated with the designation being copied. Please note that the copy functionality does not include Facility Designations or Migrated HPSAs and MUAPs that are in a Withdrawn Status. Once user selects "Copy" on the designation search page, the user is directed to the following screen:



1. **Current Designation Name**: This field is read only and is the name of the designation being copied.

2. **New Designation Name**: This field is required and allows the user to re-name the new in progress designation, if desired. The system will display the current designations name as a read only display above this field for user reference.
3. **Current Designation Discipline**: This field is read only and is the discipline of the designation being copied.
4. **New Designation Discipl**ine: This field is required and allows the user to select a new discipline, if desired, for the new in-progress designation that will be created from the designation the user wishes to copy. The user will be provided with the same selections available on the new Mapping Tool landing page (See Section 5a). The system will display the current designation discipline as a read only display above this field for user reference.
5. **Current Designation Type**: This field is read only and is the Designation type of the designation being copied.
6. **New Designation Type**: This field is required and allows the user to select a new designation type, if desired, for the new in-progress designation that will be created from the designation the user wishes to copy. The user will be provided with the same selections available on the new Mapping Tool landing page (See Mapping Tool User Guide). The system will display the current designation type as a read only display above this field for user reference.
7. **Current Designation Option**: This field is read only and is the Designation option of the designation being copied.
8. **New Designation Option**: This field is required and allows the user to select a new designation option for the new in-progress designation that will be created from the designation the user wishes to copy. The user will be provided with the same selections available on the new Mapping Tool landing page (See Mapping Tool User Guide). The system will display the current designation type as a read only display above this field for user reference.
9. **Copy Designation**: The user should select this button once they are ready to copy the designation.

Once the user selects “Copy Designation” button, the system will create a new record and direct the user to the Mapping Tool.

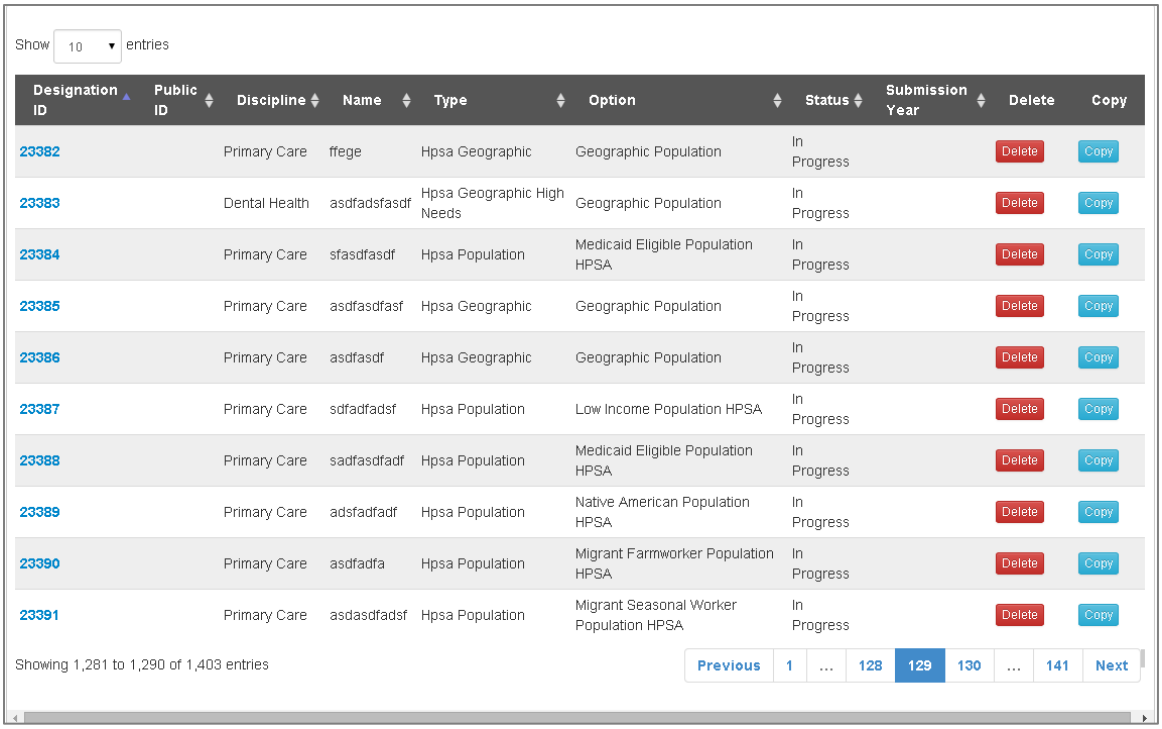


Once the user selects the “Continue” button, the system will direct them to the Invalid RSA step. The user can now edit and work on the new in-progress application using the same guidance and business rules explained in the Creating a New Designation section of this user guide (Section 5).

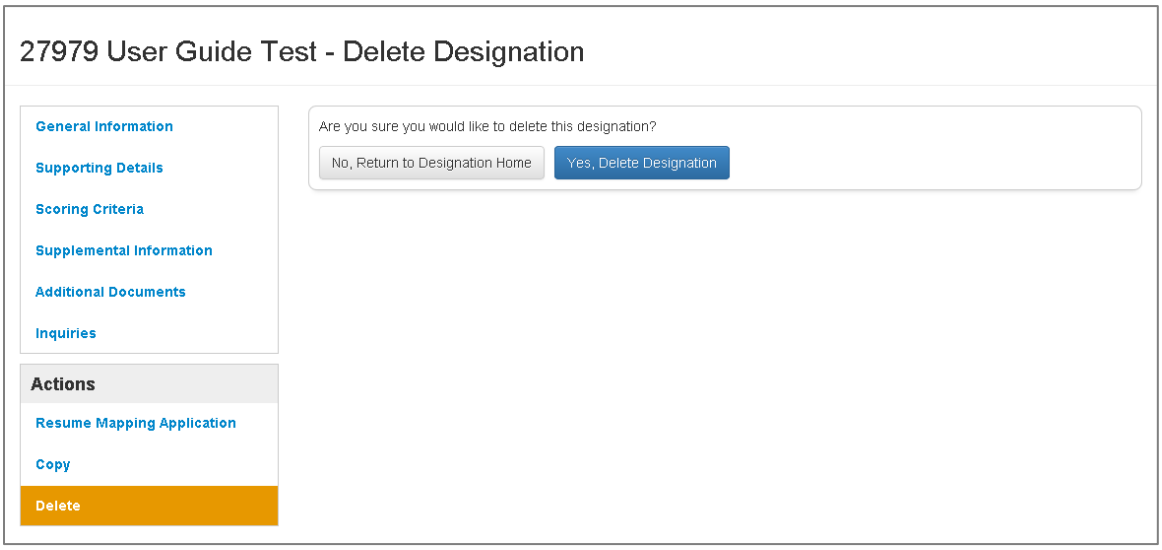
Important Information to Note: The CA geometries of the migrated HPSA and MUAPs were not available for migration into the Shortage Designation Management System. The user will need to create contiguous areas as part of the application process if these migrated designations are copied.

DELETING AN IN-PROGRESS DESIGNATION

The user has the ability to delete any designation search result with an in-progress status. The delete button will only be enabled if the designation’s status is in progress. For all other statues the button will be greyed out and inaccessible.



Once the user selects the delete button on the search results page, the user will be directed to the following page:



1. **"No, Return to Designation"**: The user should select this button if they do not want to delete the in-progress designation. Upon selecting this button, the user will be directed back to the general information section of the Designation Profile.
2. **"Yes, Delete Designation"**: The user should select this button if they would like to delete the in progress designation. Once selected, the system will then direct the user back to the Designation Search page.

Important Information to Note: Once the user deletes an in-progress designation, that record will no longer be accessible in the search results. However, the delete is a "soft delete" and the information for that designation can be recovered.

VIII. ACCESSING DESIGNATION PROFILE

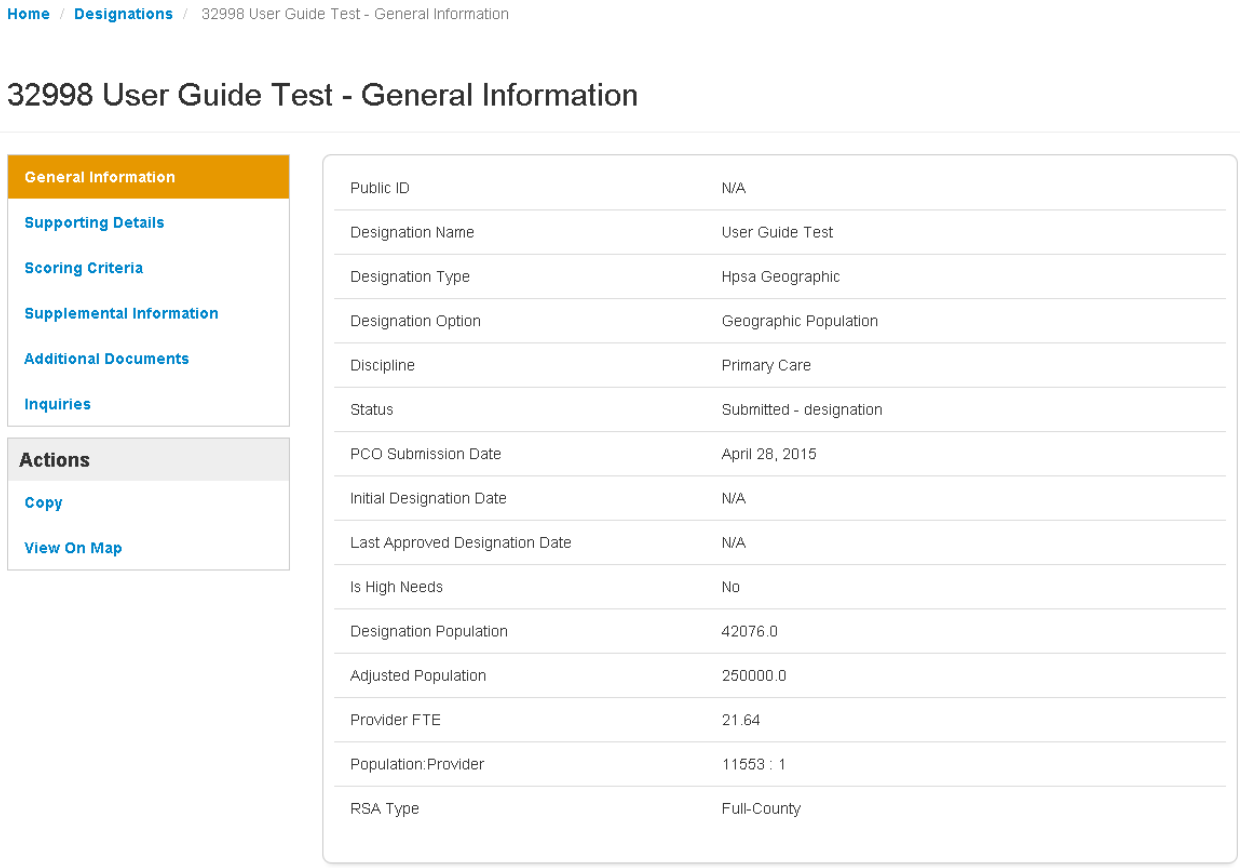
In order to access the designation profile, the user should select the Case ID hyperlink in the search results. The Designation Profile consists of the following sections:

- General Information
- Supporting Details
- Scoring Criteria
- Supplemental Information (only applicable for HPSAs and MUAPs)
- Additional Documents
- Inquiries
- Actions

VIEWING GENERAL INFORMATION

Once the user selects the Case ID hyperlink, the system will automatically direct the user to the General Information Section. All fields under the General Information section are read only and are information pulled from the HPSA and MUAP Mapping Tool as well as all designations migrated from ASAPS.

HPSAS and MUAPS:

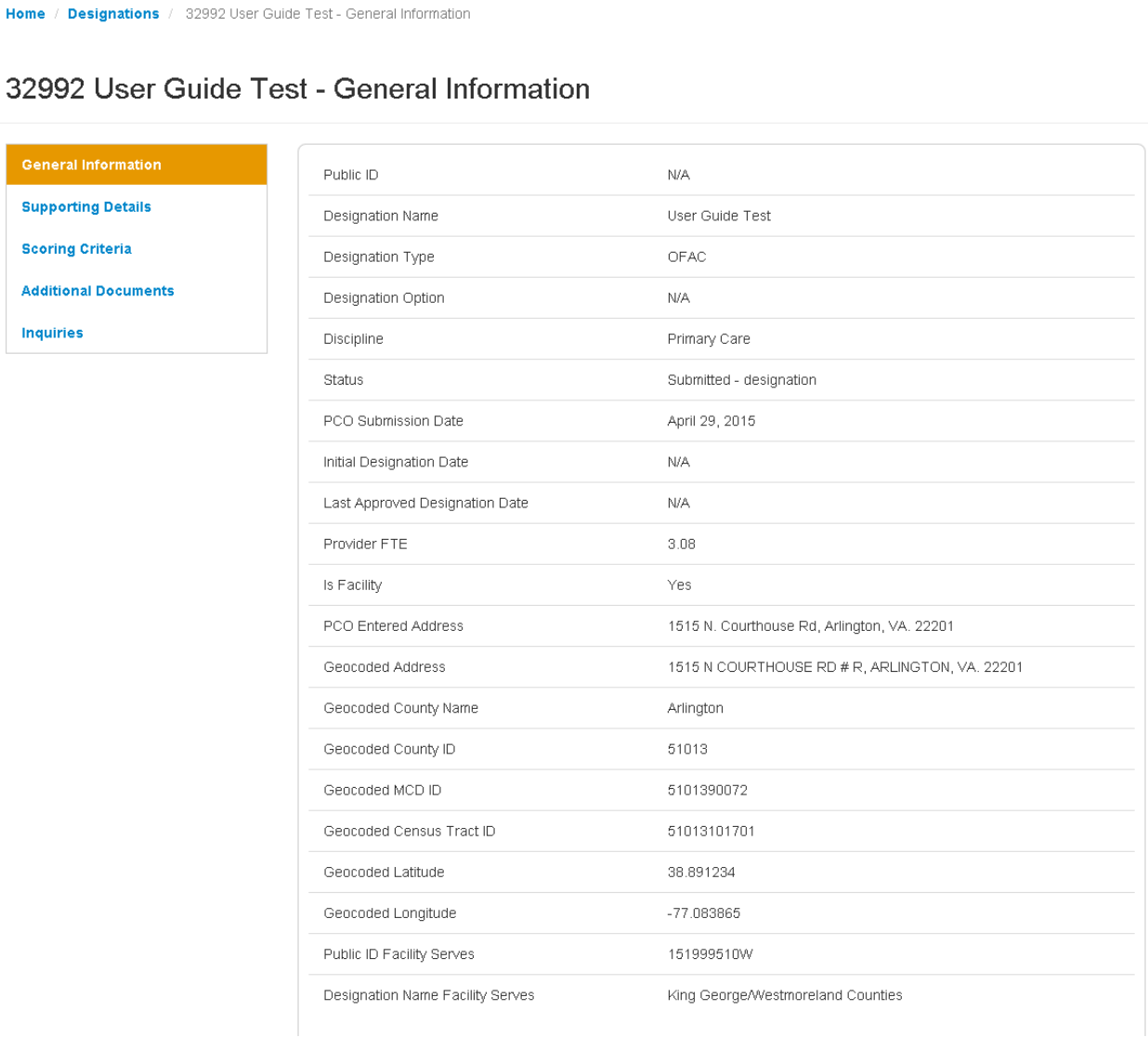


1. **PCO Submission Date**: The field represents the date the designation is submitted for review.

2. **Initial Designation Date**: This field represents the date the designation was initially designated.
3. **Last Approved Designation Date:** This field represents when the designation was last approved by a SDB Analyst.
4. **Is High Needs**: This field represents if the designation is Geographic High Needs.
5. **Designation Population**: This field represents the total resident civilian population of the area selected for the RSA.
6. **Adjusted Population**: This field represents the user adjusted population for the RSA that is entered upon saving an RSA on the Mapping Tool.
7. **Provider FTE**: This field represents the FTE for all providers that serve the RSA.
8. **Population: Provider FTE**: This field represents the population to provider ratio of the RSA.
9. **RSA Type**: This field represents the type of RSA that was selected. The options include Full-County or Sub-County.

Other Facilities (OFACS):

All fields under the General Information section are read only and are information pulled from the OFAC Facility application as well as all designations migrated from ASAPS. Some of the fields are the same as HPSAs and MUAPs profiles, please see below for the additional fields for OFACs.

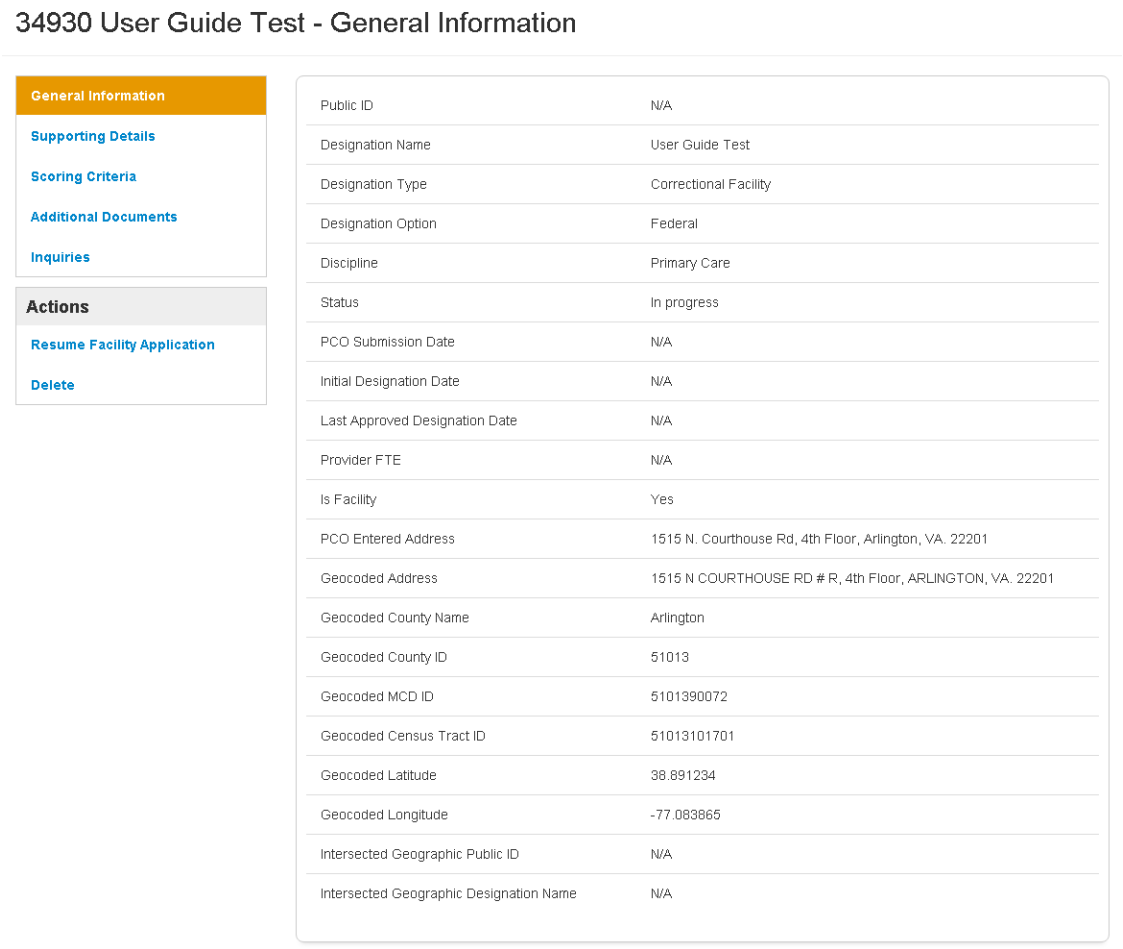


1. **Is Facility**: This field indicates to the user if the designation is a facility or not.
2. **PCO Entered Address**: This field will display the facility address entered by the PCO on the application.
3. **Geocoded Address**: This field will display the standardized address of the facility.
4. **Geocoded County Name**: This field indicates the County the facility is located in.
5. **Geocoded County ID**: This field indicates the County ID that the facility is located in
6. **Geocoded MCD ID**: This field indicates the MCD ID that the facility is located in.

7. **Geocoded Census Tract ID**: This field indicates the CT ID that the facility is located in.
8. **Geocoded Latitude**: This field indicates the latitude coordinate of the facility.
9. **Geocoded Longitude**: This field indicates the longitude coordinate of the facility.
10. **Public ID Facility Serves**: This field will display the ID of the designation the OFAC is tied to.
11. **Designation Name Facility Serves**: This field will display the Name of the designation that the OFAC is tied to.

Important Information to Note: If the OFAC's address has not been geocoded, items 3-9 will not appear on the profile.

Correctional Facilities:
All fields under the General Information section are read only and are information pulled from the Correctional Facility application as well as all designations migrated from ASAPS Some of the fields are the same as HPSAs, MUAPs and OFAC profiles, please see below for the additional fields for Correctional Facilities.

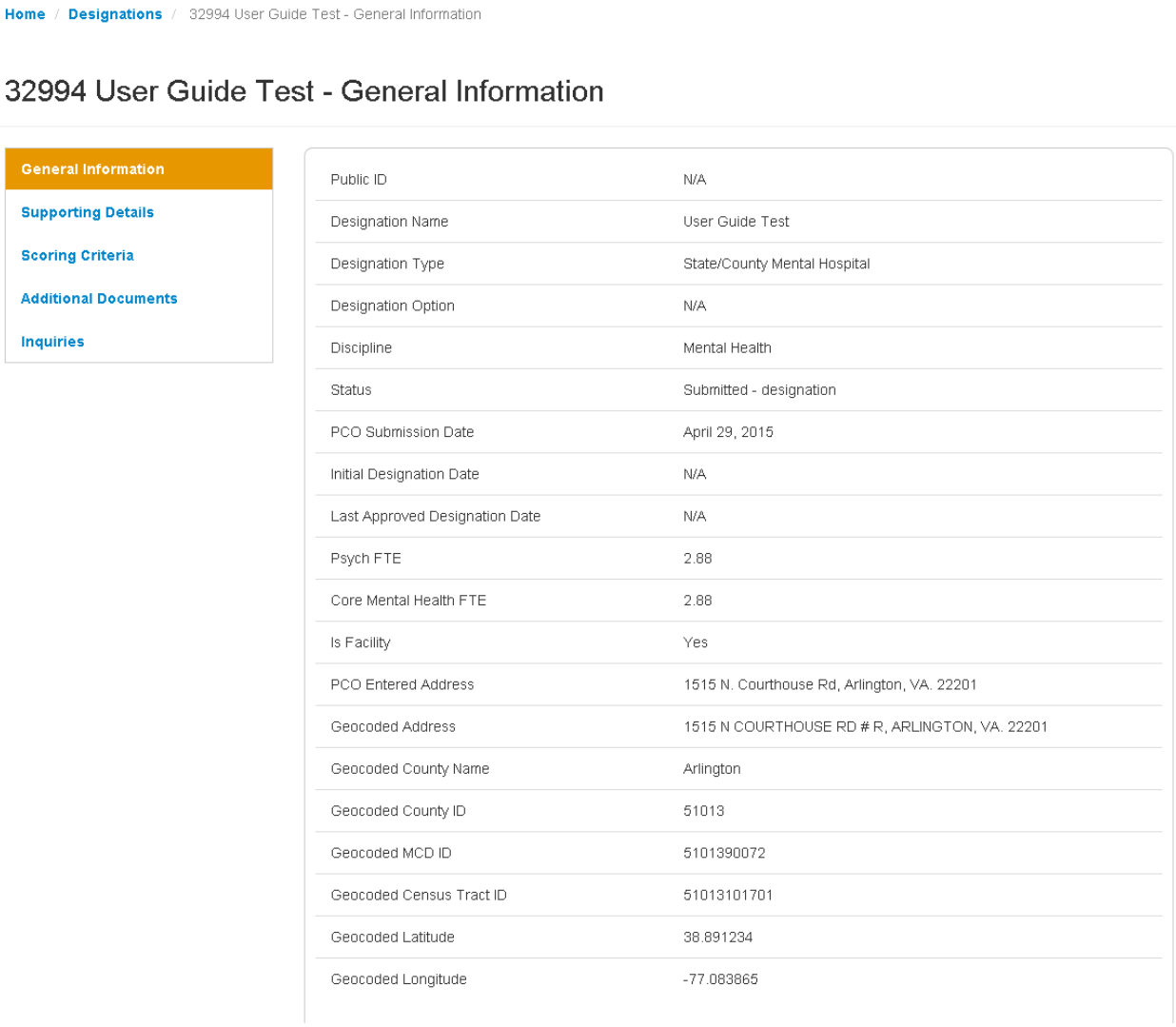


1. **Intersected Geographic Public ID**: This field will display the Public ID of a Geographic Designation if the correctional facility falls within an active Geographic Designation.

2. **Intersected Geographic Designation Name**: This field will display a Designation Name of a Geographic Designation if the correctional facility falls within an active Geographic Designation.

State/ County Mental Hospitals:

All fields under the General Information section are read only and are information pulled from the State/County Mental Hospital application as well as all designations migrated from ASAPS. Please see below for the fields that are unique to State/County Mental Hospitals



1. **Psych FTE**: This field represents the FTE for all psychiatrists that work at the facility
2. **Core Mental Health FTE**: This field represents the FTE for all core mental health providers that work at the facility.

VIEWING SUPPORTING DETAILS

Once the user selects the Supporting Details tab on the left panel of the designation profile, they will be directed to the Supporting Details section. All fields under the Supporting Details section are read only and are information pulled from the HPSA/MUAP Mapping Tool, Facility application and all designations migrated from ASAPS. Depending on the type of Designation, different information will be displayed under the Supporting Details section.

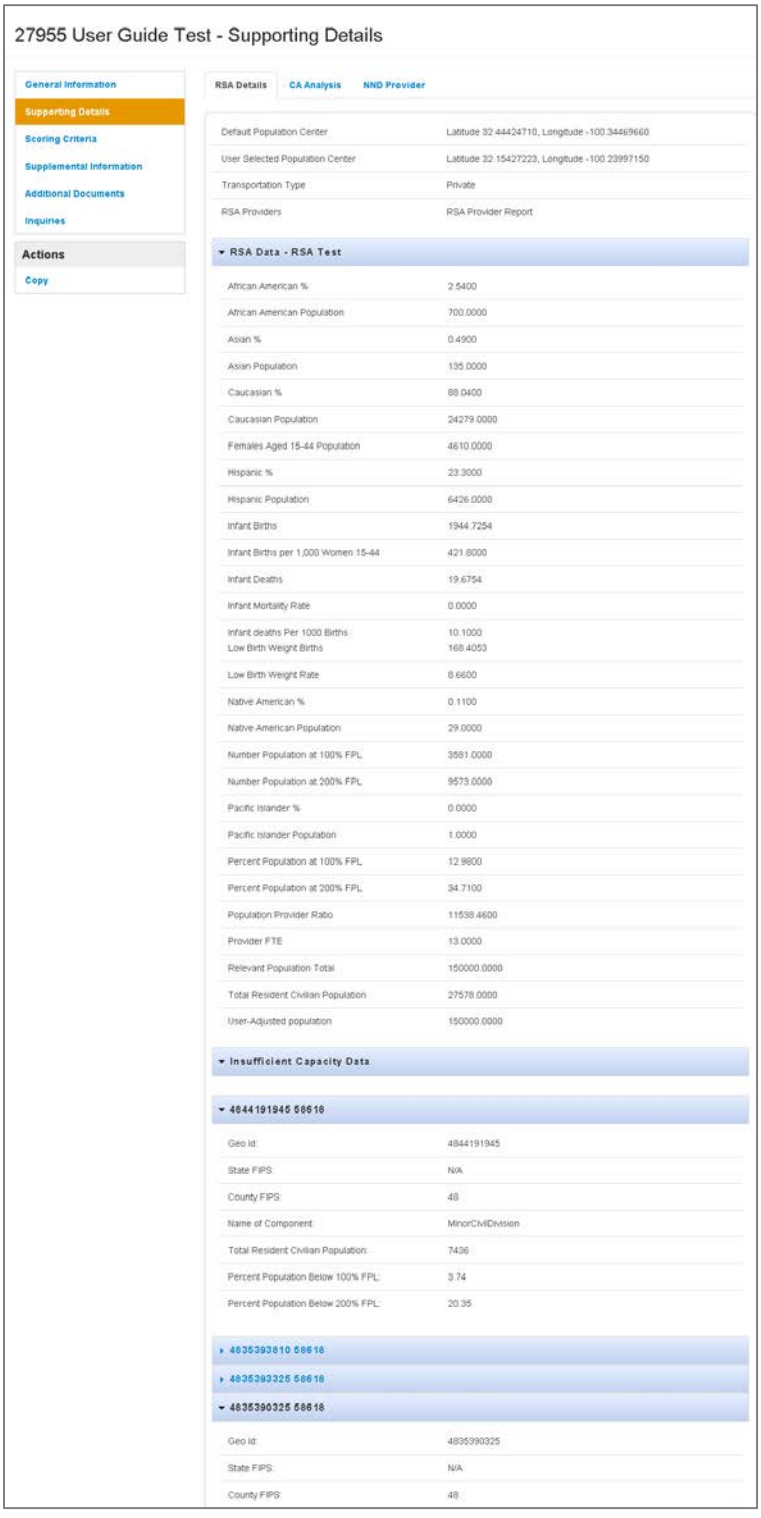
HPSAS and MUA/Ps:
The supporting details section for HPSAs is divided into three read only sections:

- RSA Details
- CA Analysis
- NND Provider

The RSA details section will appear automatically when the user selects on the Supporting Details section. This is the only section that will appear for MUAP designations.

Important Information to Note: The Supporting Details tab is dynamic based on what has been completed for a specific designation on the Mapping Tool. If the user has not reached or completed a certain step in the Mapping Tool, that section will not display any information on the Designation Profile.

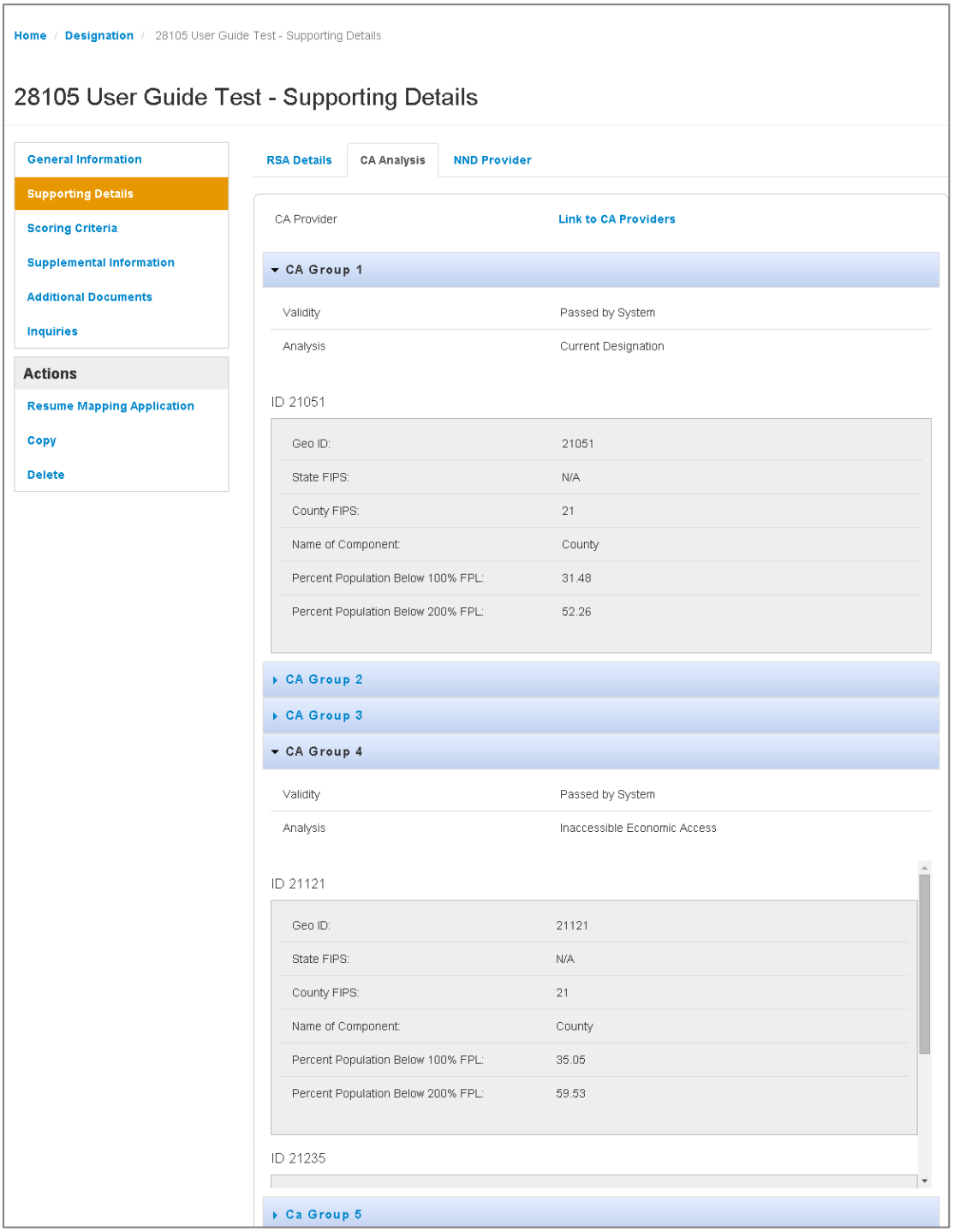
RSA DETAILS


27955 User Guide Test - Supporting Details
General Information
Supporting Details
Scoring Criteria
Supplemental Information
Additional Documents
Inquiries
Actions
Copy
RSA Details
CA Analysis
NND Provider
Default Population Center
Latitude 32.44424710, Longitude -100.34469660
User Selected Population Center
Latitude 32.15427223, Longitude -100.23997150
Transportation Type
Private
RSA Providers
RSA Provider Report
RSA Data - RSA Test
African American %
2.5400
African American Population
700.0000
Asian %
0.4900
Asian Population
135.0000
Caucasian %
88.0400
Caucasian Population
24279.0000
Females Aged 15-44 Population
4610.0000
Hispanic %
23.3000
Hispanic Population
6426.0000
Infant Births
1944.7254
Infant Births per 1,000 Women 15-44
421.8000
Infant Deaths
19.6754
Infant Mortality Rate
0.0000
Infant deaths Per 1000 Births
10.1000
Low Birth Weight Births
168.4053
Low Birth Weight Rate
8.6600
Native American %
0.1100
Native American Population
29.0000
Number Population at 100% FPL
3581.0000
Number Population at 200% FPL
9573.0000
Pacific Islander %
0.0000
Pacific Islander Population
1.0000
Percent Population at 100% FPL
12.9800
Percent Population at 200% FPL
34.7100
Population Provider Ratio
11538.4600
Provider FTE
13.0000
Relevant Population Total
150000.0000
Total Resident Civilian Population
27578.0000
User-Adjusted population
150000.0000
Insufficient Capacity Data
4844191945 58618
Geo Id:
4844191945
State FIPS:
N/A
County FIPS:
48
Name of Component:
MinorCivilDivision
Total Resident Civilian Population:
7436
Percent Population Below 100% FPL:
3.74
Percent Population Below 200% FPL:
20.35
4835393610 58618
4835393325 58618
4835390325 58618
Geo Id:
4835390325
State FIPS:
N/A
County FIPS:
48

1. **Default Population Center**: This field represents the system produced population center on the Mapping Tool for the specific designation.
2. **User Selected Population Center**: This field represents the user selected population center on the Mapping Tool for the specific designation. This field will not display if the user has not moved the population center on the Mapping Tool.
3. **Transportation Type**: This field represents the mode of transportation selected for the travel polygon on the Mapping Tool for the specific designation.
4. **RSA Providers**: The user will be able to click on the "RSA Provider Report" link to access a report on a separate screen with all the providers tied to the RSA.
5. **RSA Data**: This section will display all of the health and demographic data points for the RSA that were available on the data panel of the Mapping Tool upon saving the RSA.
6. **Insufficient Capacity Data**: This section will display any information entered by the user on the insufficient capacity tab before saving an RSA on the Mapping Tool for a Geographic High Needs application.
7. **RSA Component ID**: This twirl down field will list a component ID of the RSA selected on the Mapping Tool and will display the following information for each component of the RSA:
    - Geo ID: This field represents the geo ID of the RSA component.
    - State FIPS: This field represents the FIPS code for the state of the specific RSA component.
    - County FIPS: This field represents the FIPS code for the county of the specific RSA component.
    - Name of Component: This field represents the name of the specific RSA component.
    - Total Resident Civilian Population: This field represents the total resident civilian population of the specific RSA component.
    - Percent Population at 100% FPL: This field represents the percent of the population that is at 100% of the federal poverty level for the specific RSA component.
    - Percent Population at 200% FPL: This field represents the percent of the population that is at 200% of the federal poverty level for the specific RSA component.

CA ANALYSIS

The CA Analysis section will appear once the tab is clicked upon. This section displays all Contiguous Areas that the user created in the Mapping Tool for the specific designation. Each Contiguous Area will be identified by the name and will have the same type of information.



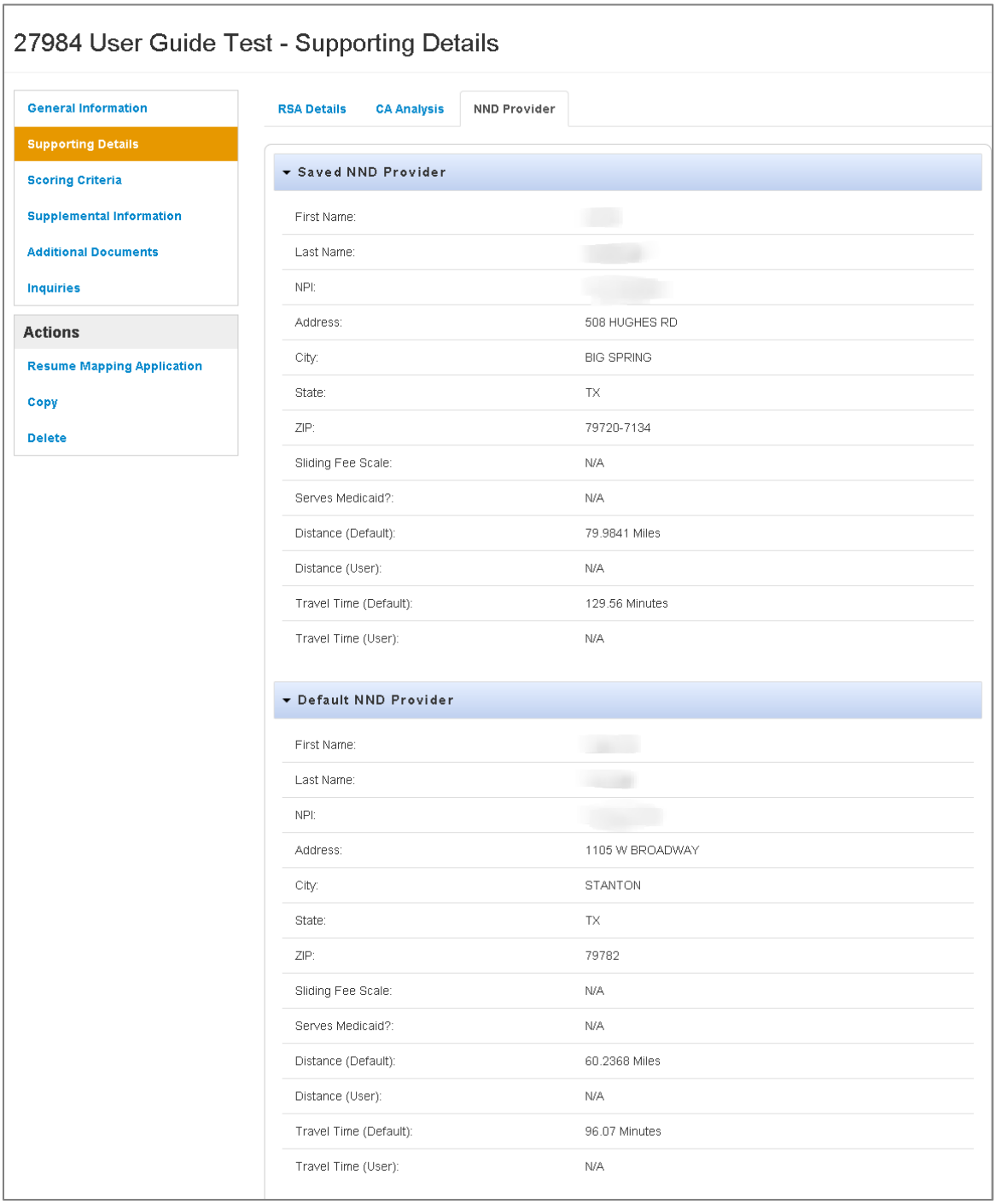
1. **CA Provider**: The user will be able to click on the “Link to CA Providers” link to access a report on a separate screen with all the providers tied to the Contiguous Areas.
2. **Component Name**: This twirl down will display the name of each CA component entered by the user on the Mapping Tool for a specific designation. The user may collapse or expand a component by selecting the arrow to the left of the Component.
3. **Validity**: This field will display the results of the validity test run by the system on the CA Analysis step on the Mapping Tool. If this check doesn’t pass the CA doesn’t qualify. Please see the Contiguous Area section of the Mapping Tool User Guide for more information.
4. **Analysis**: This field will display the results of the analysis run by the system on the CA Analysis step on the Mapping Tool. If this check doesn’t pass the user can force pass which will be captured on the profile. Please see the Contiguous Area section of the Mapping Tool User Guide for more information.
5. **Component/Geo ID**: This field will list the Geo ID of the specific component in each contiguous area. Each component will display the same information as the RSA components. If a contiguous area has more than one component, that will also be displayed and accessible through a scroll bar.

NND PROVIDER

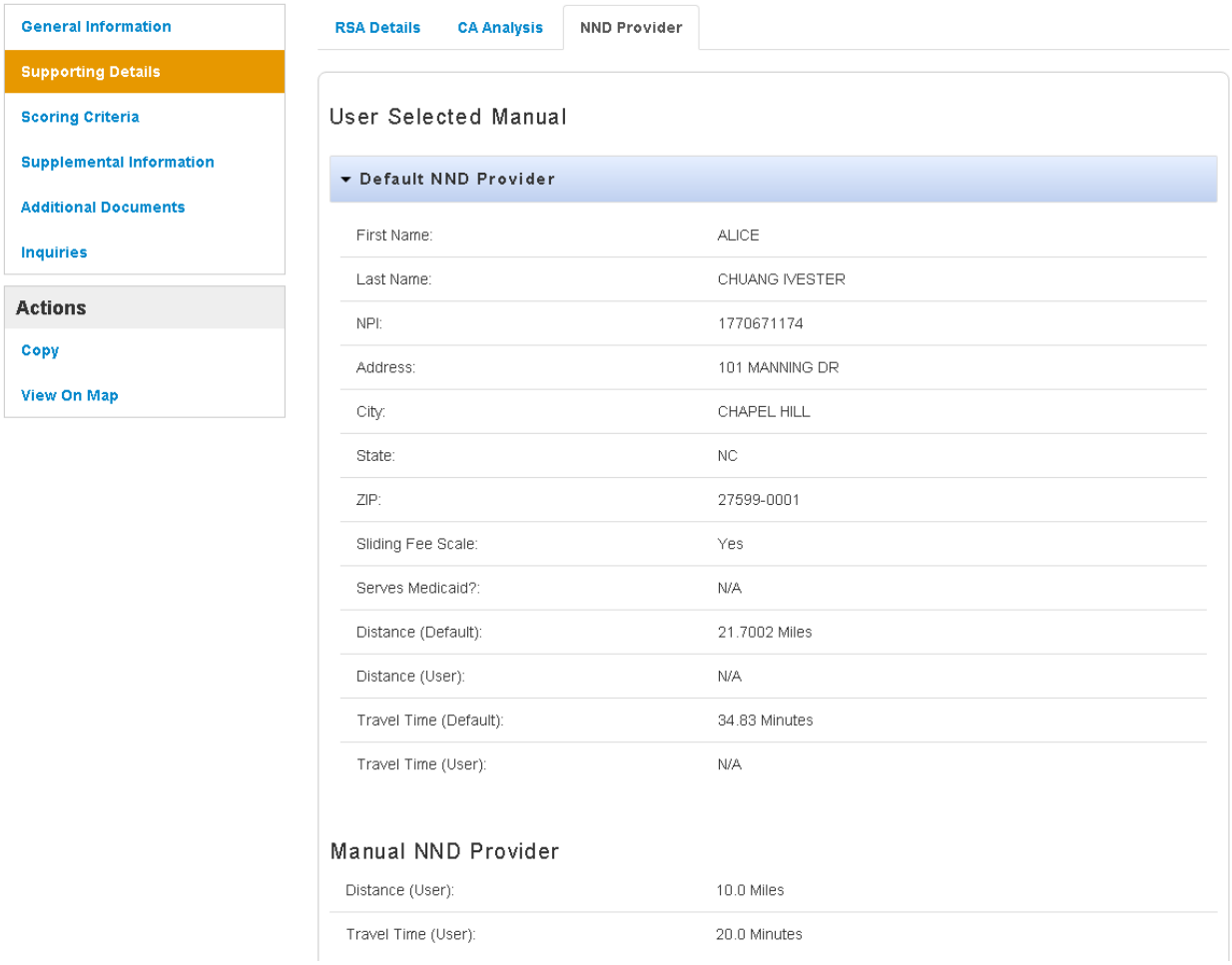
The NND Provider section will appear once the tab is clicked upon. This section will display the Default NND and if applicable, the user selected NND, manually entered NND, or that the user has chosen no NND.

1. **Saved Provider NND**: This field represents the user selected NND on the Mapping Tool. Important Information to Note: The Saved NND Provider tab will only display if the user has manually selected the NND on the Mapping Tool. The Default NND Provider information will always appear on the profile if one is found by the system.
2. **Default NND Provider**: This field represents the NND found by the system on the Mapping Tool. Important Information to Note: The Default NND Provider information will always appear on the profile if one is found by the system.
    a. User Selected NND: In certain cases, the system may be unable to identify a suitable provider to serve as the NND, or the user may wish to select an alternate NND.
    b. Manually Entered NND: If the system does not have up-to-date road data or no road data, the user can select Manually Entered NND.
    c. User Continued with no NND: If the system cannot identify any usable providers that serve the RSA population or the provider is well outside of the miles and minutes radius for the discipline, the user can continue with no NND.
3. **NPI**: This field represents the provider's National Practitioner ID.
4. **Distance (Default)**: This field represents the system calculated distance from the provider to the population center of the RSA.
5. **Distance (User)**: This field represents the user entered distance from the provider to the population center of the RSA. The user can update this information on the supplemental information form of the Mapping Tool. If the user does not update the distance, the field will appear as N/A.
6. **Travel Time (Default)**: This field represents the system calculated time from the provider to the population center of the RSA.
7. **Travel Time (User)**: This field represents the user entered time from the provider to the population center of the RSA. The user can update this information on the supplemental information form of the Mapping Tool. If the user does not update the time, the field will appear as N/A.

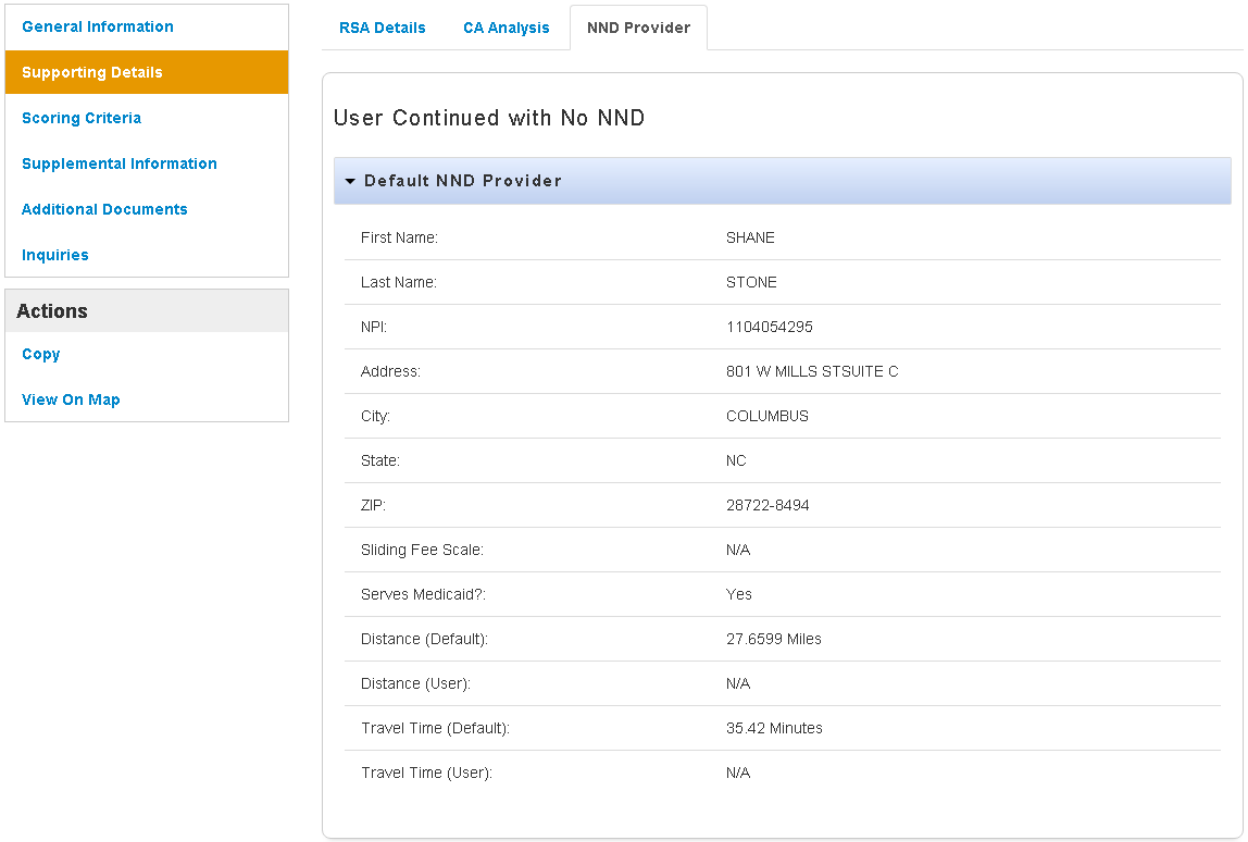
USER SELECTED NND



MANUALLY ENTERED NND



USER CONTINUED WITH NO NND



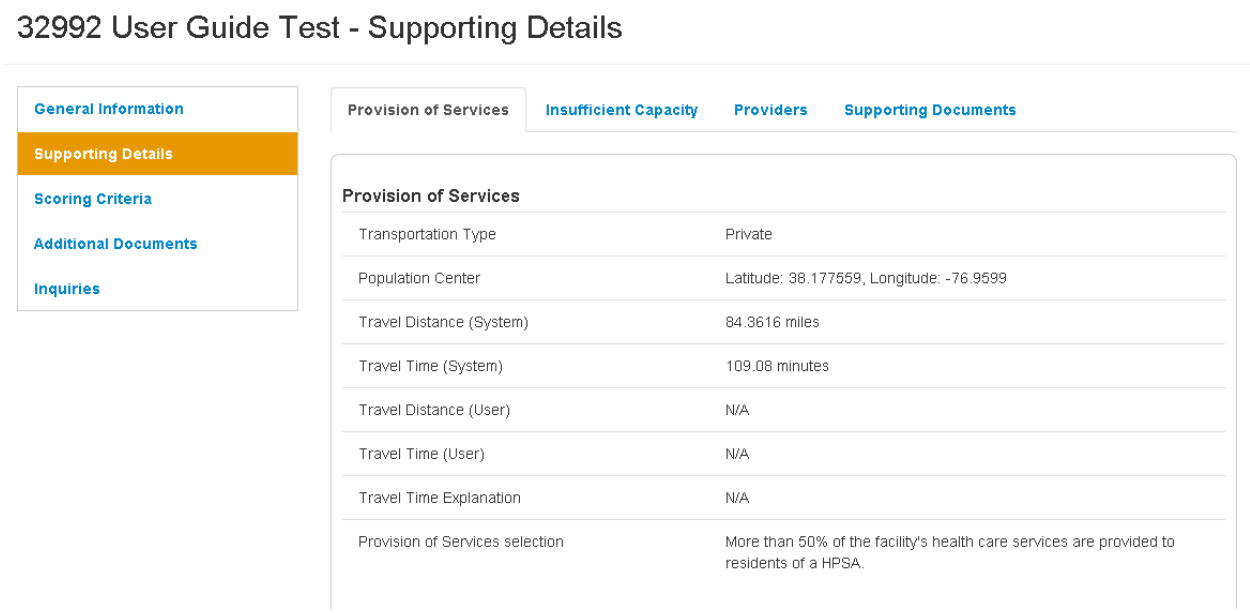
SUPPORTING DETAILS: OFACS

The supporting details section for OFACs is divided into four read only sections:

- Provision of Services
- Insufficient Capacity
- Providers
- Supporting Documents

Important Information to Note: The Supporting Details tab is dynamic based on what has been completed for a specific OFAC on the facility application. If the user has not reached or completed a certain step in the Facility application, that section will not display any information on the Designation Profile. This section will also available for all the information that was migrated from ASAPS.

PROVISION OF SERVICES

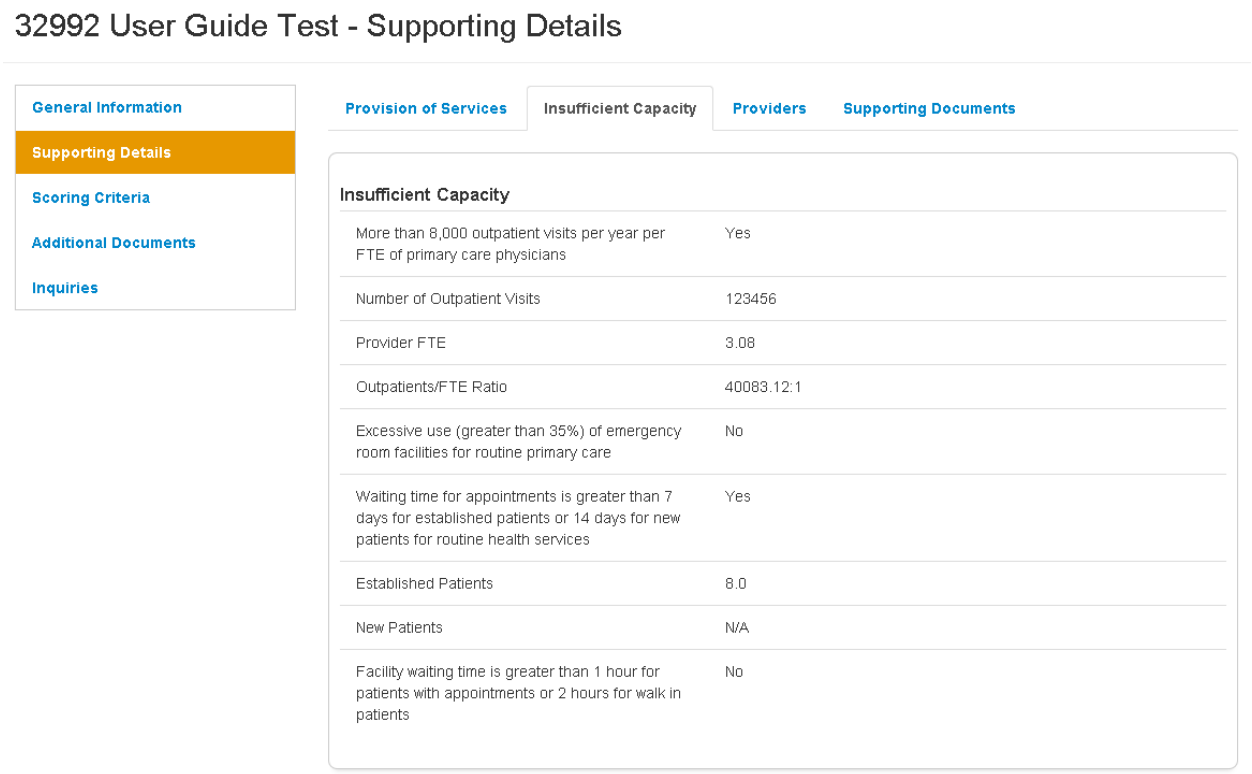


1. **Transportation Type**: This field represents the user selected transportation type used to determine travel time between the OFAC and the designation that it is serving.
2. **Population Center**: This field represents the population center coordinates of the designation that the OFAC is serving.
3. **Travel Distance (System)**: This field represents the system calculated travel distance, in miles, from Facility location to the Designation Population Center. If Public transportation is selected or the distance cannot be calculated the field will display as N/A.
4. **Travel Time (System)**: This field represents the system calculated travel time, in minutes, from the Facility location to the Designation Population Center. If Public transportation is selected or the time cannot be calculated the field will display as N/A.
5. **Travel Distance (User)**: This field represents the user entered distance from the facility location to the Designation Population Center. The user can update this information on the Provision of Services page of the facility application.
6. **Travel Time (User):** This field represents the user entered time from the facility location to the Designation Population Center. The user can update this information on the Provision of Services page of the facility application.
7. **Travel Time Explanation:** This field represents the user entered explanation that is required on the application if the user selects to edit the system calculated travel distance and time fields. If the user doesn't change the system generated travel time and distance, the field will appear as N/A
8. **Provision of Services:** This field represents the justification that is selected on the application of how the facility serves the designation it is tied to.

INSUFFICENT CAPACITY

The Insufficient Capacity section will appear once the tab is clicked upon. This section displays all insufficient capacity information that the user completed in the Facility application. The Insufficient Capacity section is different based on discipline of the OFAC application.

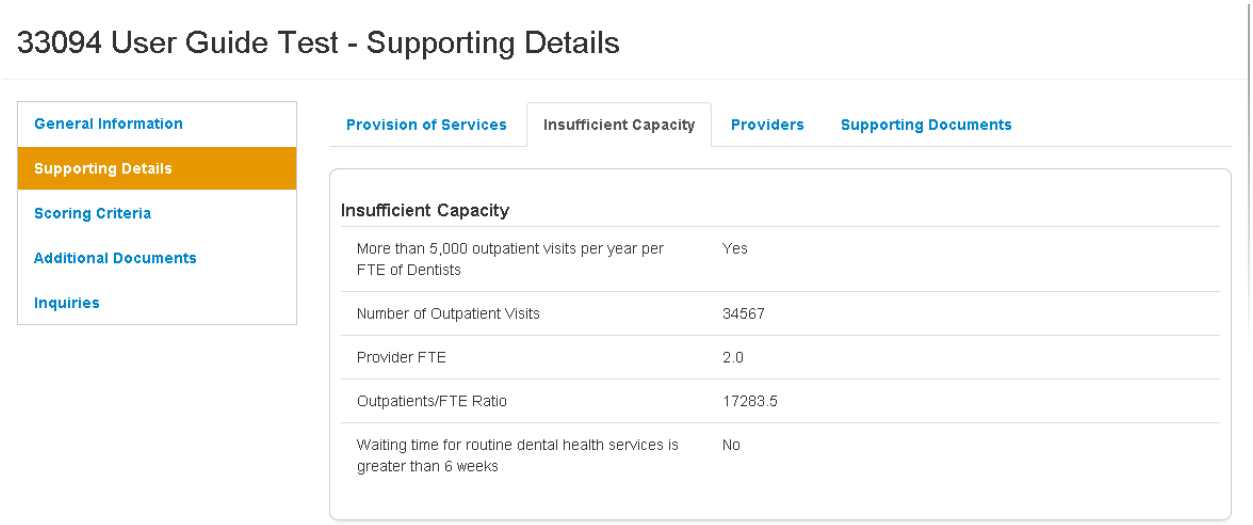
PRIMARY CARE



1. **More than 8,000 outpatient visits per year per FTE of primary care physicians**: This field represents if the user selected this option on the OFAC application.
2. **Number of Outpatients**: This field will appear if the user has entered a value on the OFAC application.
3. **Provider FTE**: This field will appear if the user has selected providers on the OFAC application.
4. **Outpatient/FTE Ratio**: This field will appear if the user has selected providers on the OFAC application.
5. **Excessive use (greater than 35%) of emergency room facilities for routine primary care**: This field represents if the user selected this option on the OFAC application.
6. **Waiting time for appointments is greater than 7 day for established patients or 14 days for new patients for routine health services**: This field represents if the user selected this option on the OFAC application.

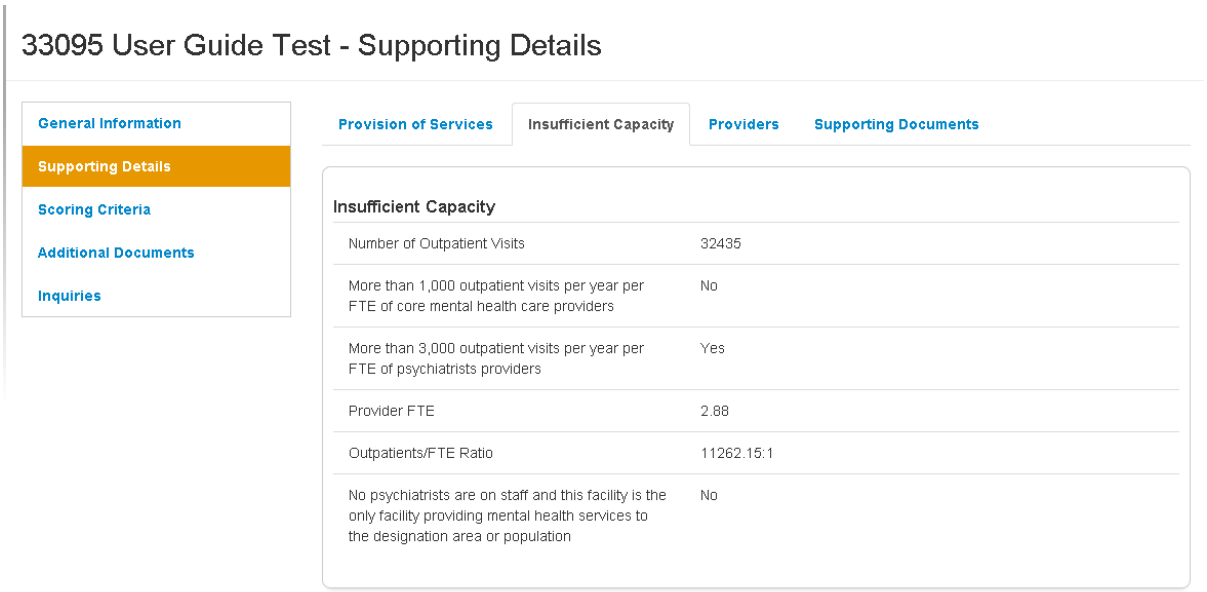
7. **Established Patients**: This field will reflect what the user entered in the OFAC application, if applicable.
8. **New Patients**: This field will reflect what the user entered in the OFAC application, if applicable.
9. **Facility Waiting time is greater than 1 hour for patients with appointments or 2 hours for walk in patients**: This field represents if the user selected this option on the OFAC application.

DENTAL HEALTH



1. **More than 5,000 outpatient visits per year per FTE Dentists**: This field represents if the user selected this option on the OFAC application.
2. **Number of Outpatients**: This field will appear if the user has entered a value on the OFAC application.
3. **Provider FTE**: This field will appear if the user has selected providers on the OFAC application.
4. **Outpatient/FTE Ratio**: This field will appear if the user has selected providers on the OFAC application.
5. **Waiting time for routine dental health services is greater than 6 weeks**: This field represents if the user selected this option on the OFAC application.

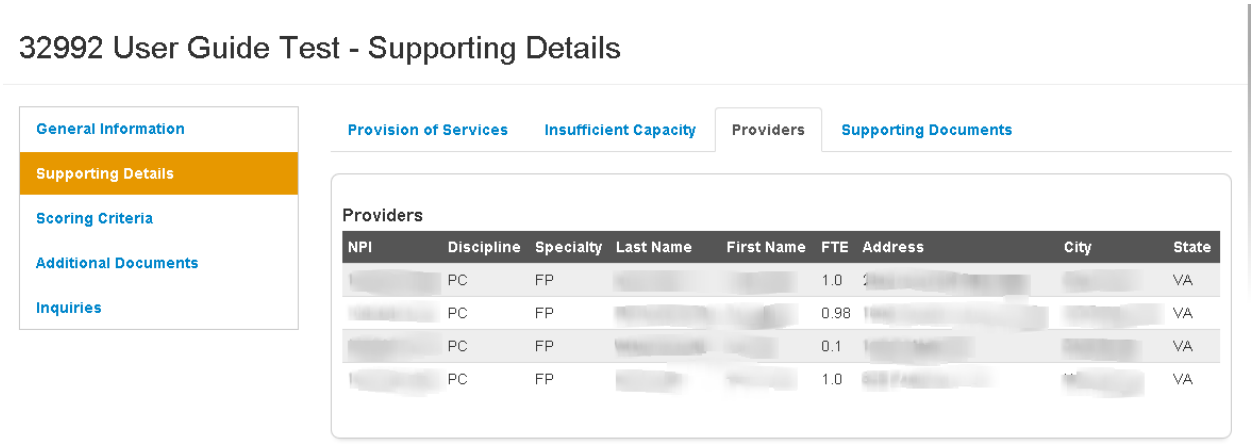
MENTAL HEALTH



1. **Number of Outpatients**: This field will appear if the user has entered a value on the OFAC application.
2. **More than 1,000 outpatient visits per year per FTE of core mental health providers**: This field represents if the user selected this option on the OFAC application.
3. **More than 3,000 outpatient visits per year per FTE of psychiatrist providers**: This field represents if the user selected this option on the OFAC application.
4. **Provider FTE**: This field will appear if the user has selected providers on the OFAC application.
5. **Outpatients/FTE Ratio**: This field will appear if the user has selected providers on the OFAC application.
6. **No psychiatrists are on staff and this facility is the only facility providing mental health services to the designation area or population**: This field represents if the user selected this option on the OFAC application.

PROVIDERS

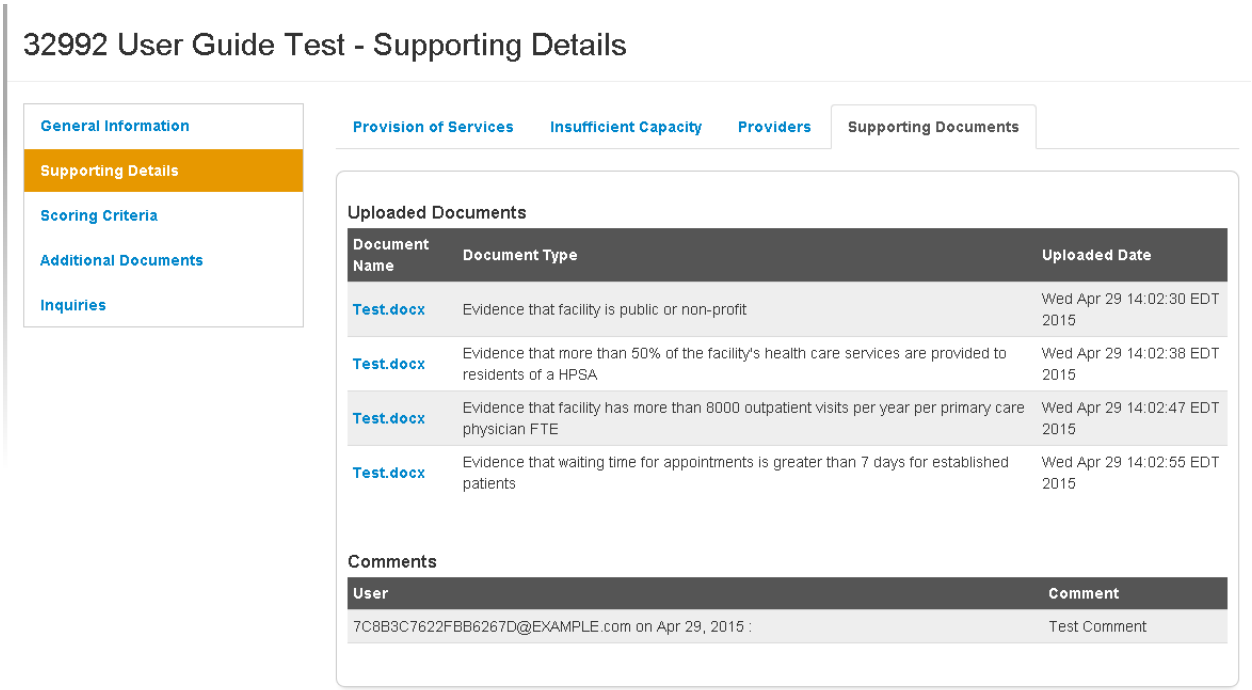
The Providers section will appear once the tab is clicked upon. This section displays all the provider information that the user completed in the Facility application. The information on this tab might not be applicable.



1. **NPI**: This field represents the provider's National Practitioner ID.
2. **Discipline:** This field represents the provider's discipline.
3. **Specialty:** This field represents the provider's specialty.
4. **Last Name:** This field represents the provider's last name.
5. **First Name:** This field represents the provider's first name.
6. **FTE:** This field represents the provider's FTE
7. **Address:** This field represents the provider's work address.
8. **City:** This field represents the provider's work city.
9. **State:** This field represents the provider's work state.

SUPPORTING DOCUMENTS

The Supporting Documents section will appear once the tab is clicked upon. This section displays all the documents and comments that the user completed in the Facility application.



1. **Document Name**: This field represents the name of the document uploaded on the OFAC application. In order to view the document, the user should select the hyperlinked document name.
2. **Document Type**: This field represents the type of document uploaded on the OFAC application.
3. **Uploaded Date**: This field represents the date and time the document was uploaded on the OFAC application.
4. **User**: This field represents the user name PCO who entered a comment on the OFAC application as well as the date the comment was entered.
5. **Comment**: This field represents the comment that was entered on the OFAC application.

CORRECTIONAL FACILITY

Correctional Facilities:

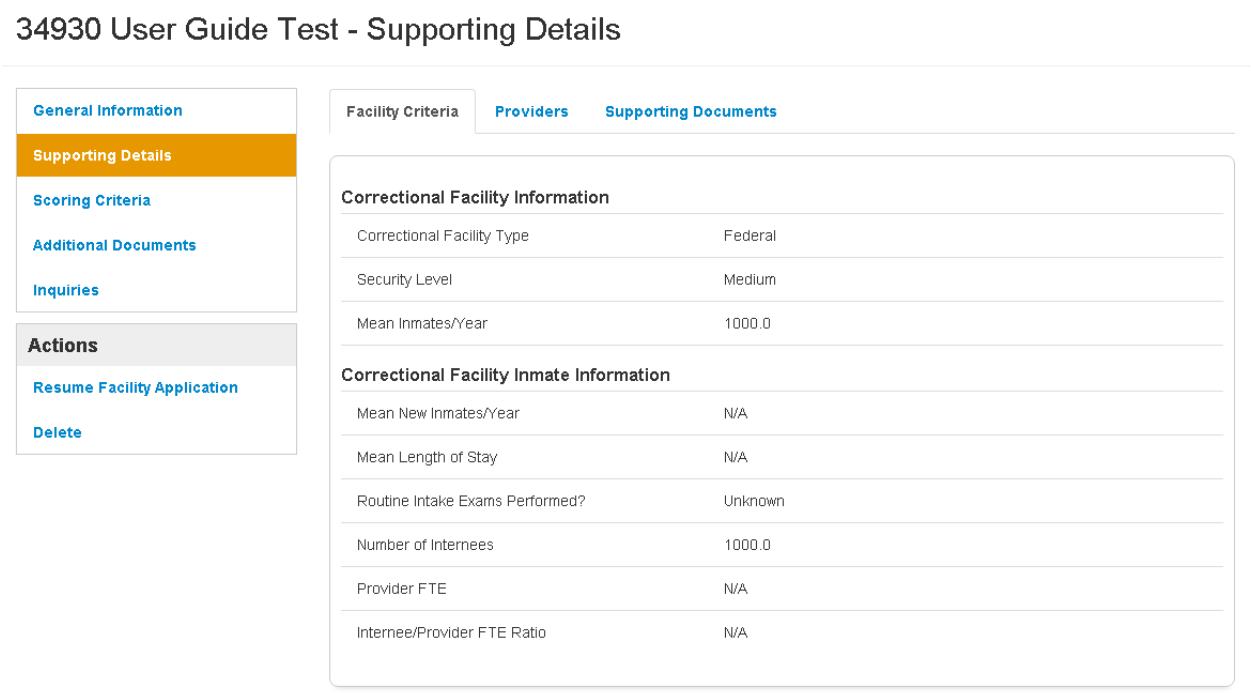
The supporting details section for Correctional Facilities is divided into three read only sections:

- Facility Criteria
- Providers
- Supporting Documents

FACILITY CRITERIA

The Supporting Details tab is dynamic based on what has been completed for a specific Correctional facility on the application. If the user has not reached or completed a certain step in the Facility application, that section will not display any information on the Designation Profile. This section also has available all of the information that was migrated from ASAPS.

The Providers and Supporting Documents section displays all the provider information and supporting document information that the user completed in the Facility application. The fields displayed are the same as in the providers and supporting documents section of the OFAC supporting details profile.



1. **Correctional Facility Type:** This field represents the value selected on the application.
2. **Security Level:** This field represents the value selected on the application, if applicable.
3. **Mean Inmates/Year:** This field represents the value entered on the application.
4. **Mean New Inmates/Year:** This field represents the value entered on the application, if applicable.

5. **Mean Length of Stay:** This field represents the value entered on the application, if applicable.
6. **Routine Intake Exams Performed?:** This field represents the value selected on the application.
7. **Number of Internees:** This field represents the value calculated on the application.
8. **Provider FTE:** This field represents the value calculated on the application, if applicable.
9. **Internee/Provider FTE Ratio:** This field represents the value calculated on the application, if applicable.

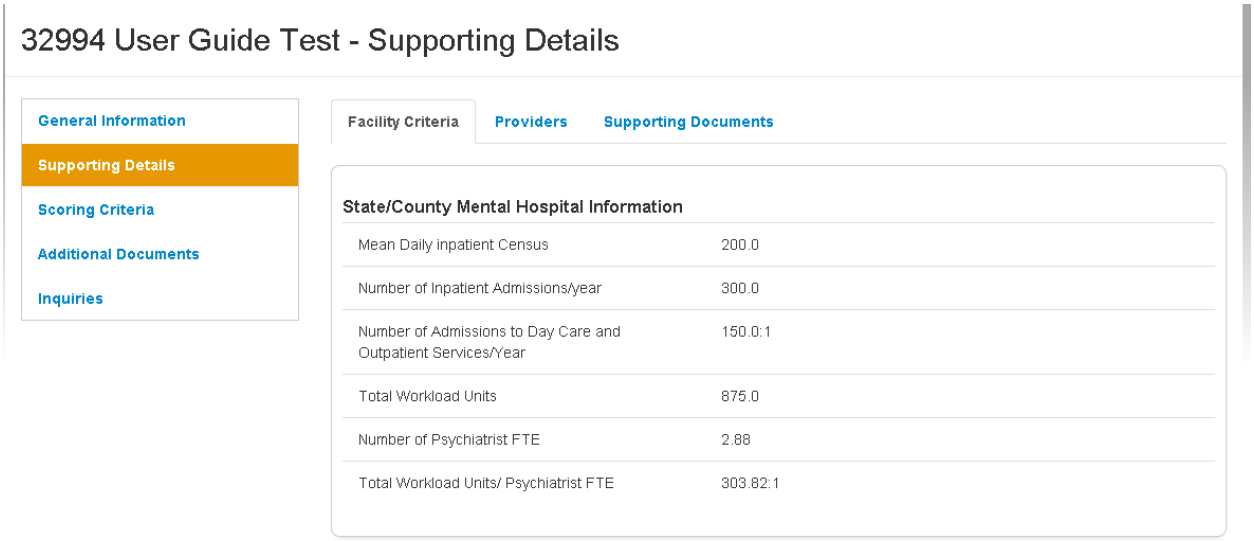
STATE MENTAL HOSPITAL

State Mental Hospitals:
The supporting details section for State/County Mental Hospitals is divided into four read only sections:

- Facility Criteria
- Providers
- Supporting Documents

FACILITY CRITERIA

Important Information to Note: The Supporting Details tab is dynamic based on what has been completed for a specific State/County Mental Hospital on the facility application. If the user has not reached or completed a certain step in the Facility application, that section will not display any information on the Designation Profile. This section will also available for all the information that was migrated from ASAPS.

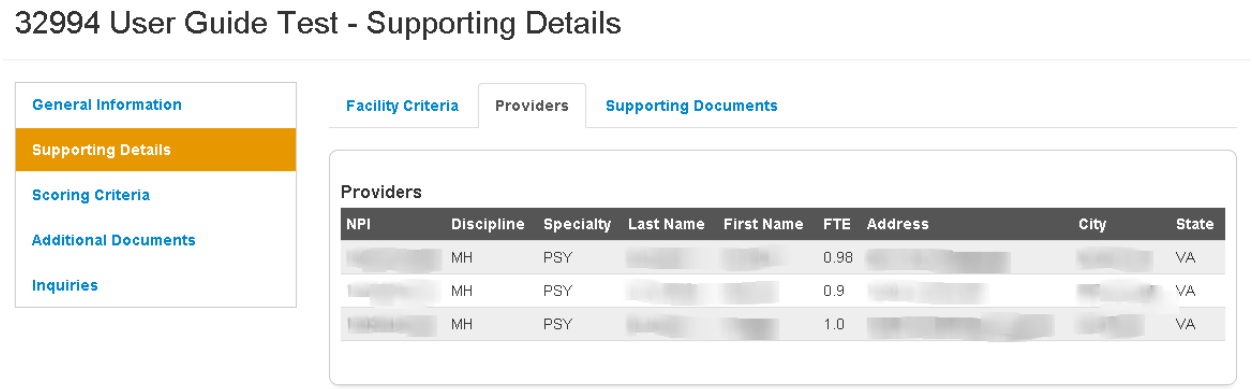


1. **Mean Daily Inpatient Census**: This field represents the number entered on the application.
2. **Number of Inpatient Admissions/year:** This field represents the number entered on the application.
3. **Number of Admissions to Day Care and Outpatient Services/Year:** This field represents the number entered on the application

4. **Total Workload Units:** This field represents the number populated on the application.
5. **Number of Psychiatrist FTE:** This field value will appear after the user selects psychiatrist on the application, if applicable.
6. **Total Workload Units/Psychiatrist FTE:** This field value will appear after the user selects psychiatrists on the application, if applicable.

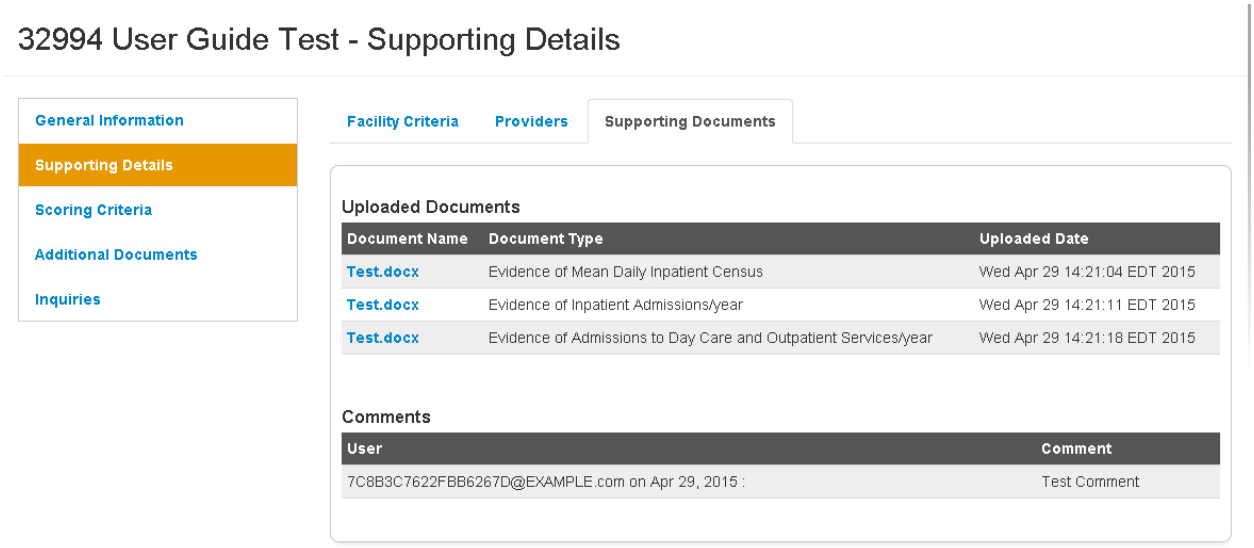
PROVIDERS

The Providers section will appear once the tab is clicked upon. This section displays all the provider information that the user completed in the Facility application. The fields displayed are the same as in the providers section of the OFAC supporting details profile.



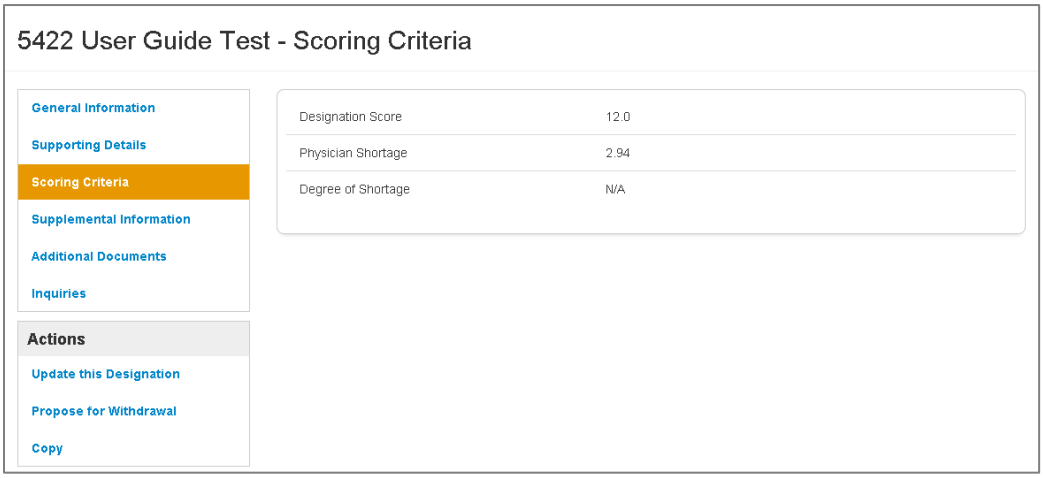
SUPPORTING DOCUMENTS

The Supporting Documents section will appear once the tab is clicked upon. This section displays all the documents and comments that the user completed in the Facility application.



VIEWING SCORING CRITERIA

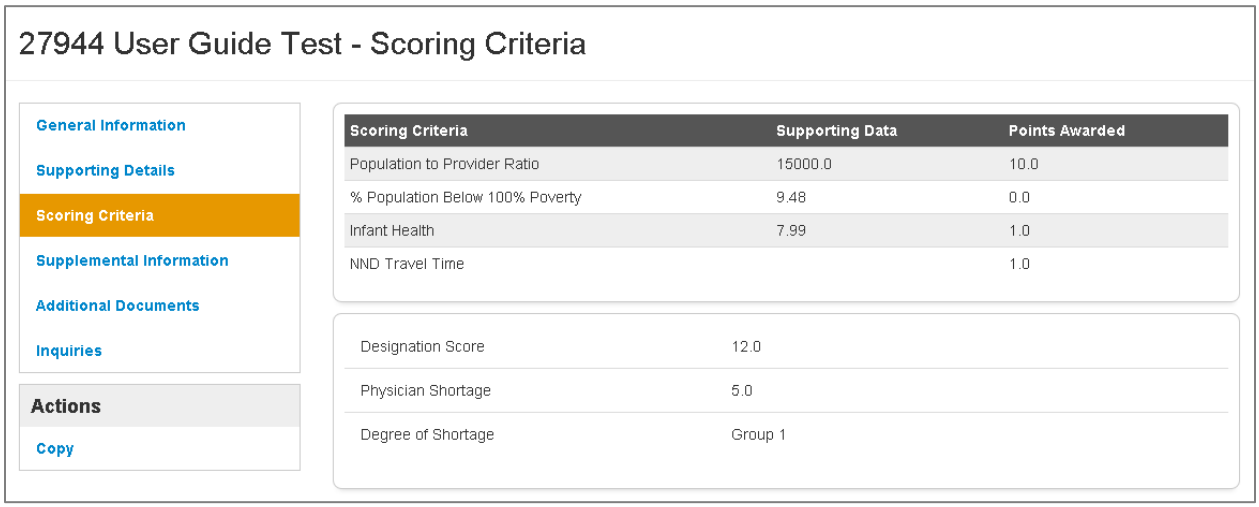
In order to access the Scoring Criteria section of the designation profile, the user should select that tab on the left hand side of the profile. All fields under the Scoring Criteria section are read only and are information pulled from the HPSA/MUAP Mapping Tool, Facility application and all designations migrated from ASAPS. All migrated designation types will have the following fields in this section:



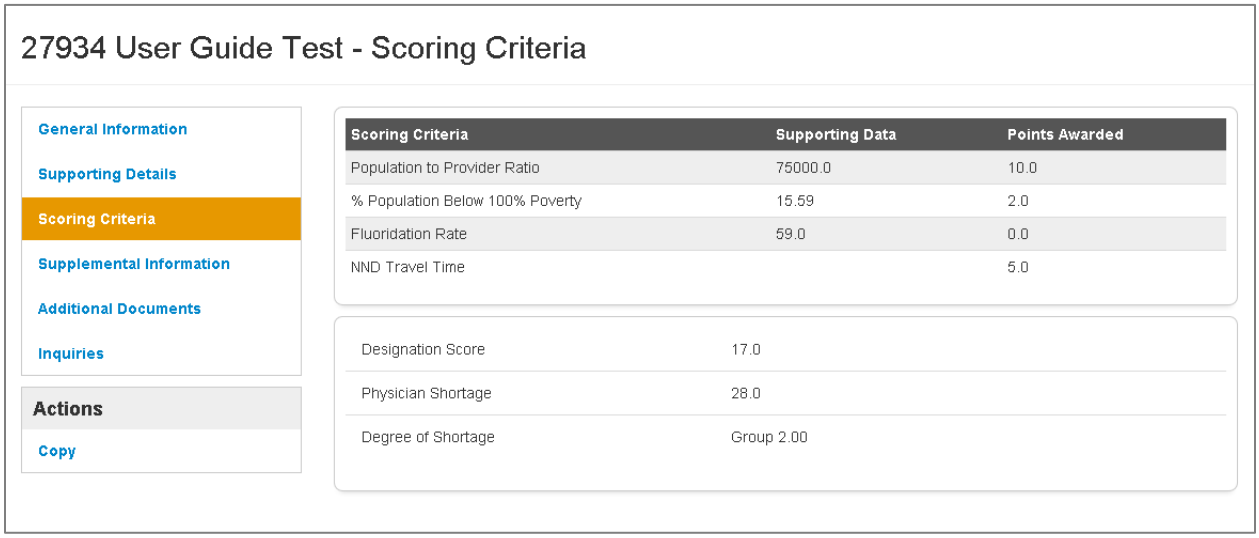
1. **Designation Score**: This field represents the score of the designation. The score is determined on the mapping tool, Facility application, or has been migrated directly from ASAPS.
2. **Physician Shortage**: This field represents how many physician FTEs are required in order for the designation to no longer be deemed to have a shortage of physicians.
3. **Degree of Shortage**: This field represents a group a designation is assigned based on the ratio of the designation population to the number of the Physician FTE. Please refer to the Shortage Designation Management System Manual for Policies and Procedures for more detailed information about the Degree of Shortage.

The scoring criteria section for all HPSA and MUAPs created with the mapping tool will reflect the same scoring tables on the Mapping Tool. The screen shots below represent an example for each discipline.

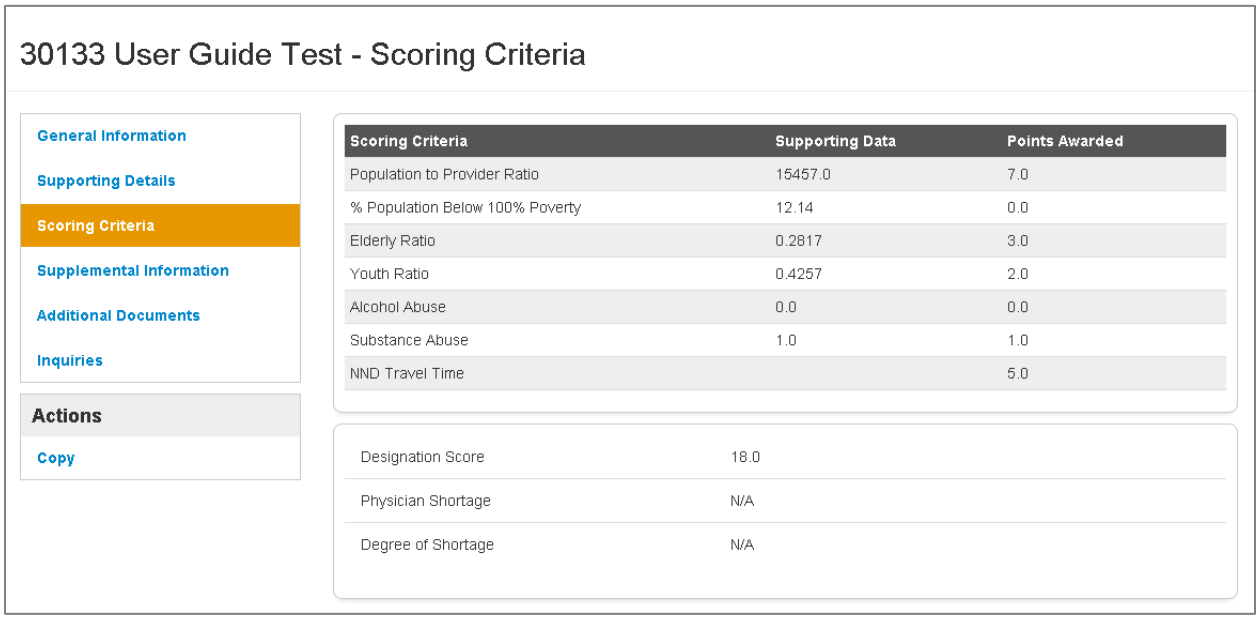
Primary Care:



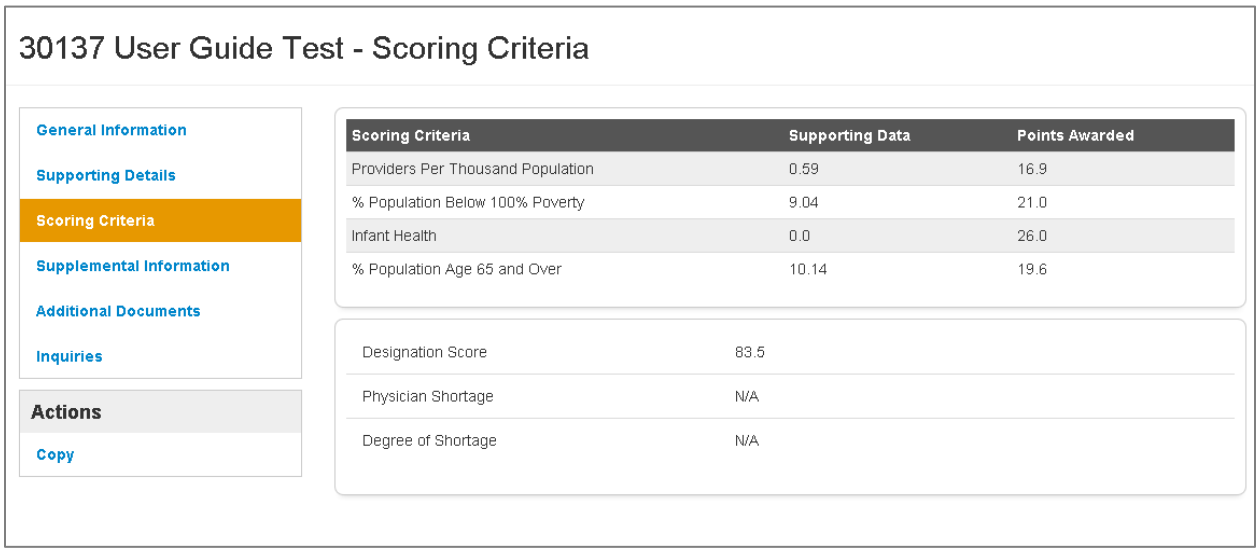
Dental Health:



Mental Health:



MUA/P:



VIEWING SUPPLEMENTAL INFORMATION

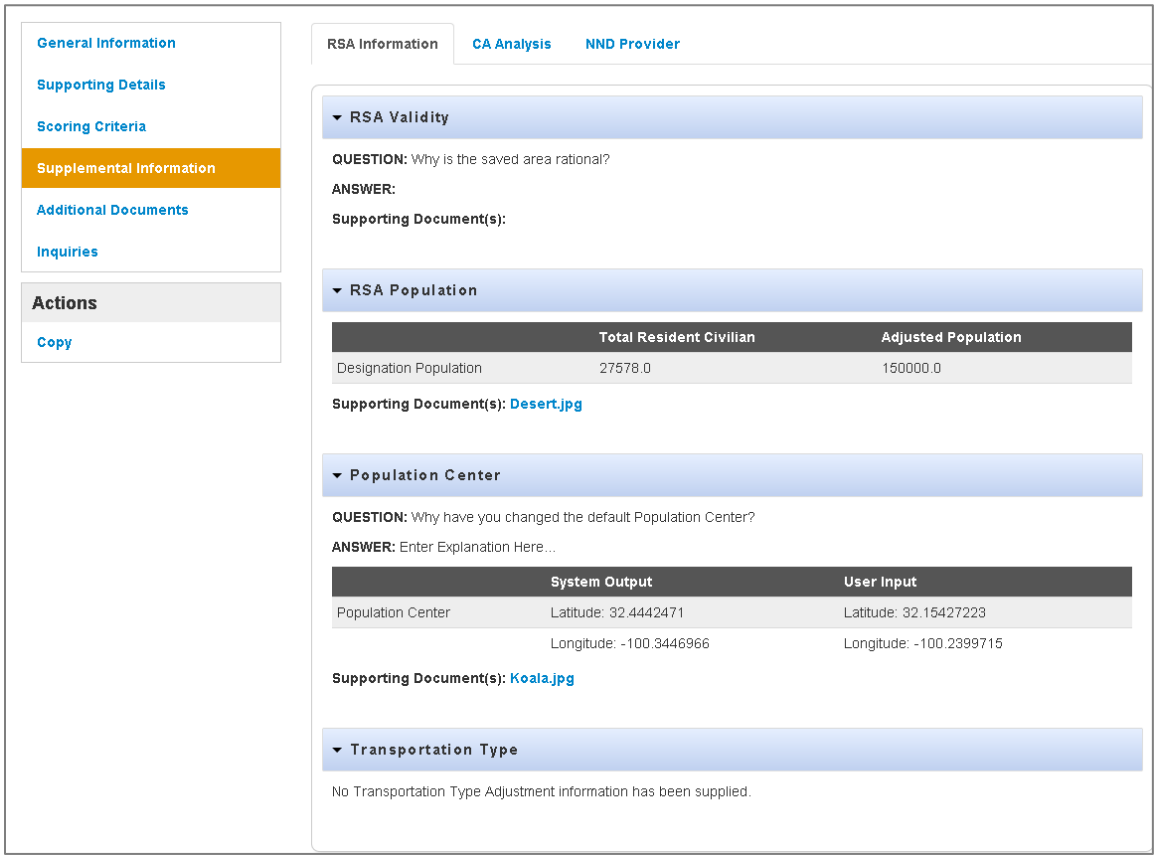
In order to access the Supplemental Information section of the designation profile, the user should select that tab on the left hand side of the profile. All fields under the Supplemental Information section are read only and are information pulled from the HPSA and MUAP Mapping Tool.

The Supplemental Information section will be blank for all migrated HPSAs and MUAPs from ASAPS and is not applicable to facility designations.

The Supplemental Information section for the Designation profile displays dynamically and mirrors the information on the supplemental information form of the mapping tool. Like the mapping tool, the supplemental information section on the profile is divided into the following sections:

- RSA Information (only section applicable to MUAPs)
- CA Analysis
- NND Provider

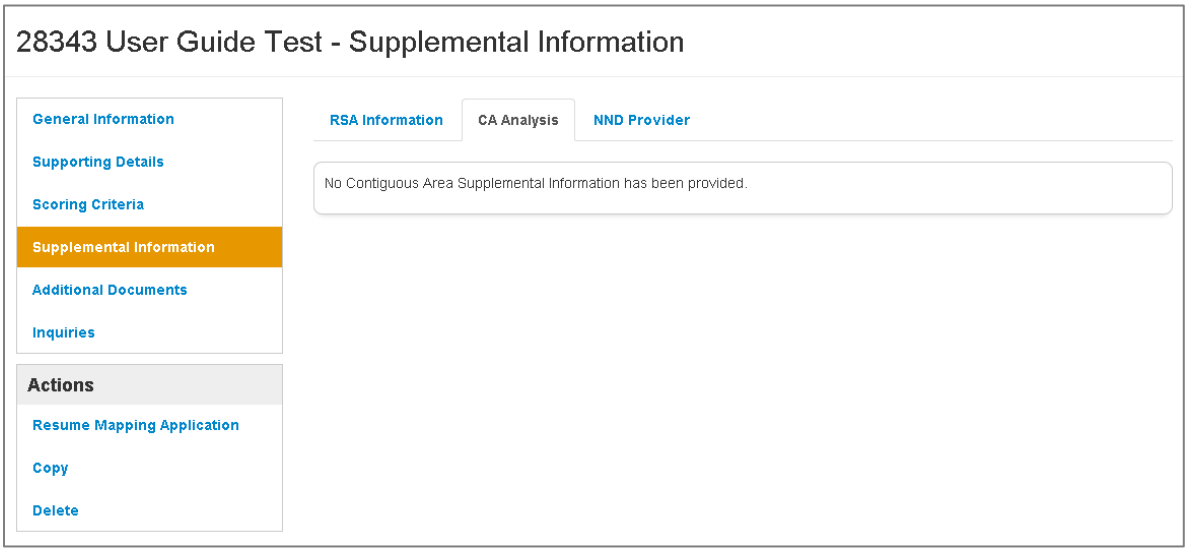
RSA INFORMATION



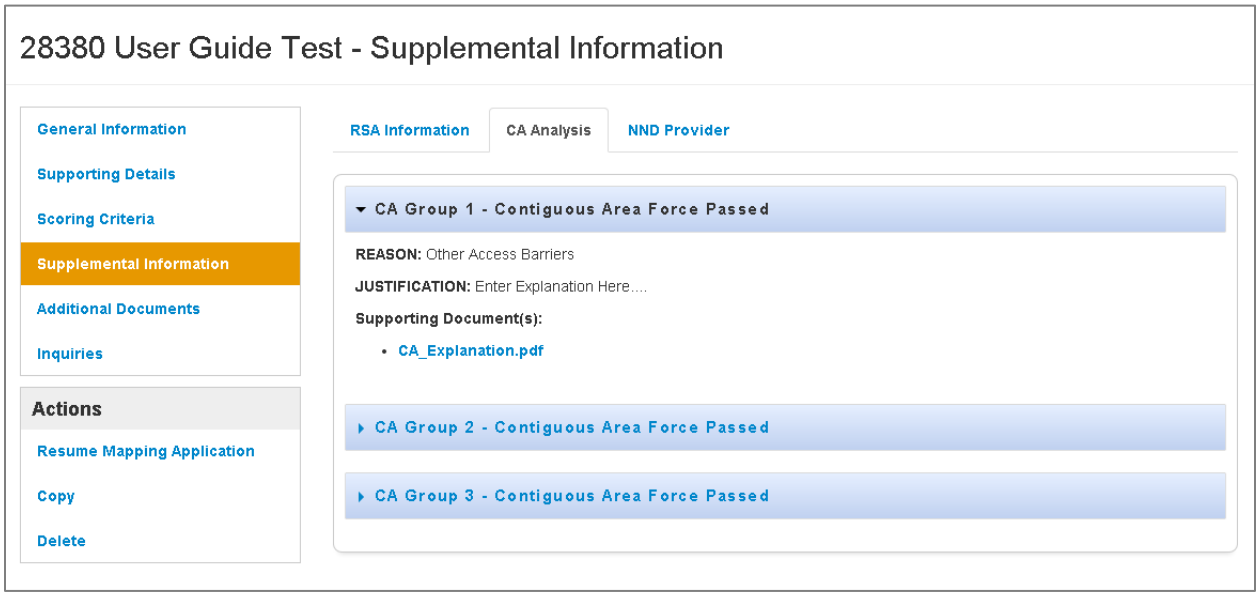
1. **RSA Validity**: This section will be completed if the user needs to justify why the saved area is rational.
2. **RSA Population**: This section will include the system sourced population, any user adjusted population and documented evidence if the population is adjusted by the user.
3. **Population Center**: This section will always display the default population center and if applicable, the user adjusted population center with the required explanation and document.
4. **Transportation Type**: This section will only display information if the user has chosen public transit and provided a justification on the mapping tool.

Important to Note: The user can collapse or expand any and all sections by selecting the arrow to the left. The user can also view documents by selecting the document hyperlink if applicable.

CA ANALYSIS



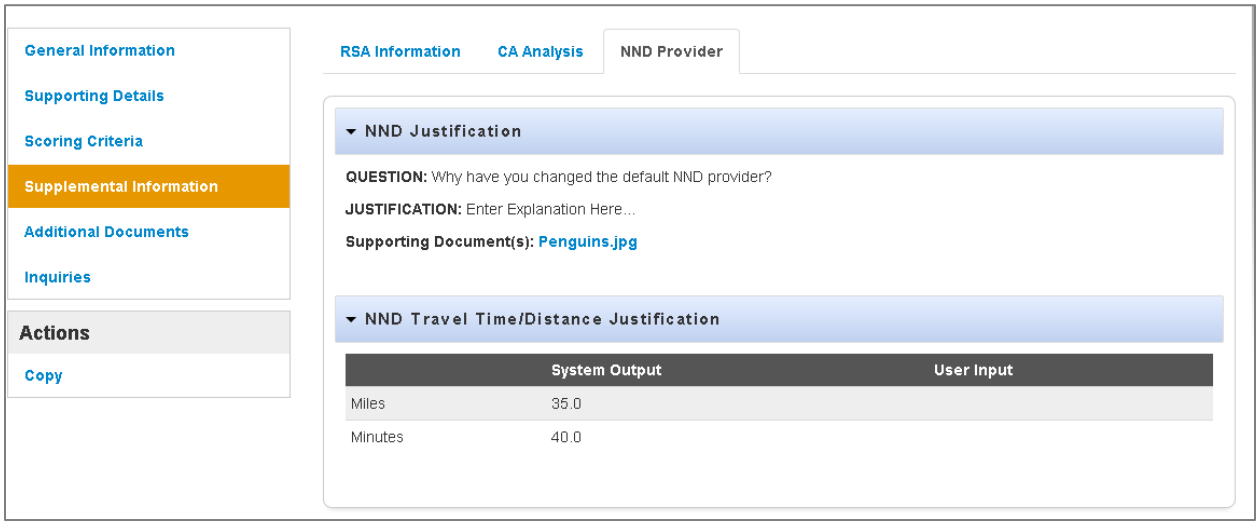
The user will see the above message if all contiguous areas in the mapping application have passed the system analysis and no additional evidence is required.



The user will see the above content if a contiguous area (s) does not pass the system analysis. The section will display the name of the component, the user selected reason, user entered explanation and document evidence that the user can view.

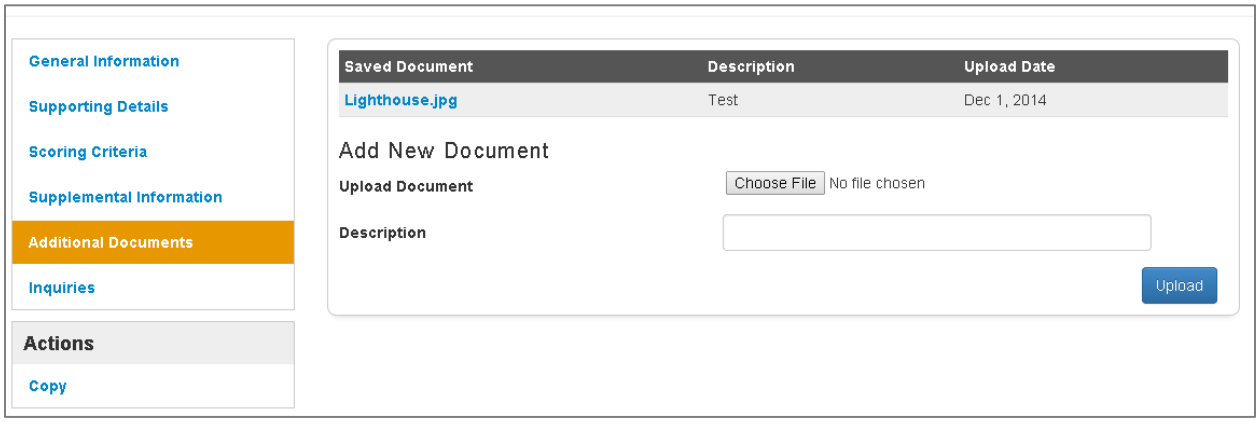
NND PROVIDER

If the user has chosen a non-Default NND on the Mapping Tool, the justification and document provided on the Supplemental information form will appear to the user under this NND Provider section. The user can also view the NND travel time and Distance from the NND selected.



ADDING ADDITIONAL DOCUMENTS

In order to access the Additional Documents section of the designation profile, the user should select that tab on the left hand side of the profile. The user can use this section to upload additional documents applicable to the designation.



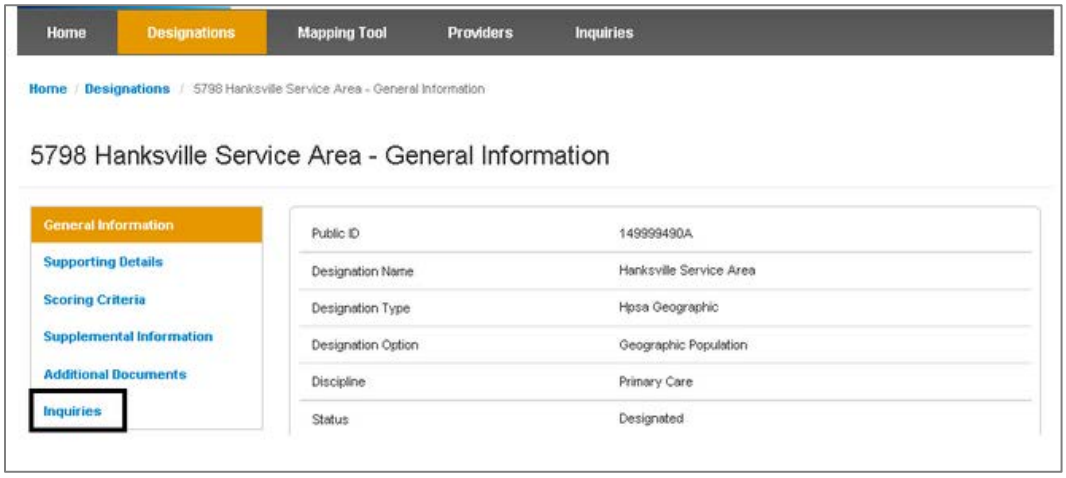
1. **"Choose File"**: This button should be selected if the user would like to upload a new document.
2. **Description**: The user has the option to input a short description about the document being uploaded.
3. **"Upload"**: This button should be selected once the user is ready to upload a document.

Business Rules:

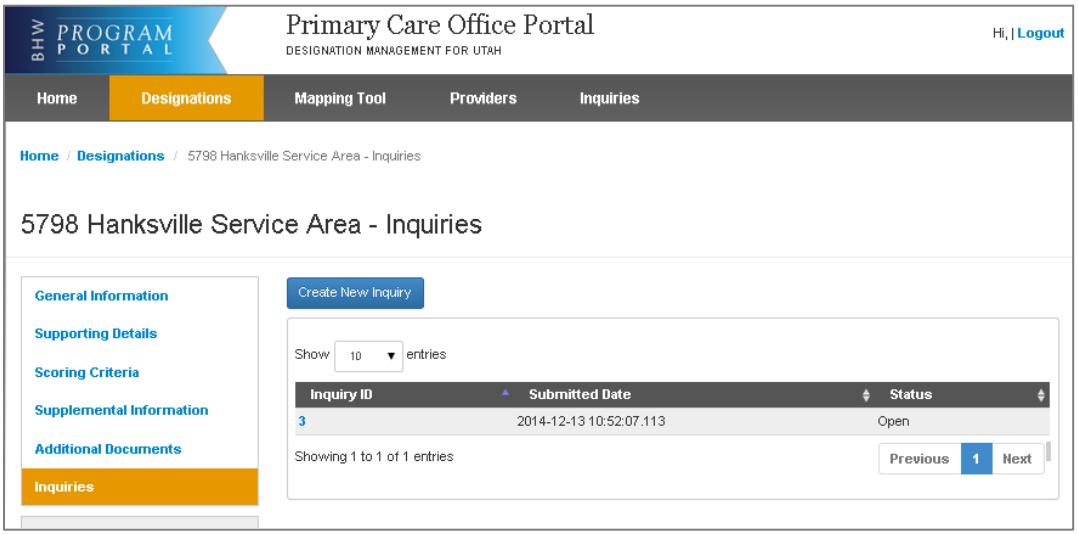
- A document must be selected before the user clicks the upload button or the user will receive a system error.
- The description text field is alpha numeric and cannot exceed 50 characters.

IX. INQUIRIES

The inquiry section of the portal provides an easy and streamlined process for the PCO user to communicate with their respective Project Officer. Inquiries may be created from the Designation Profile in the PCO Portal by navigating to the Designation Profile of the designation which is the subject of the inquiry. Clicking on the "Inquiries" tab on the designation profile will allow the PCO to create an inquiry for the designation.



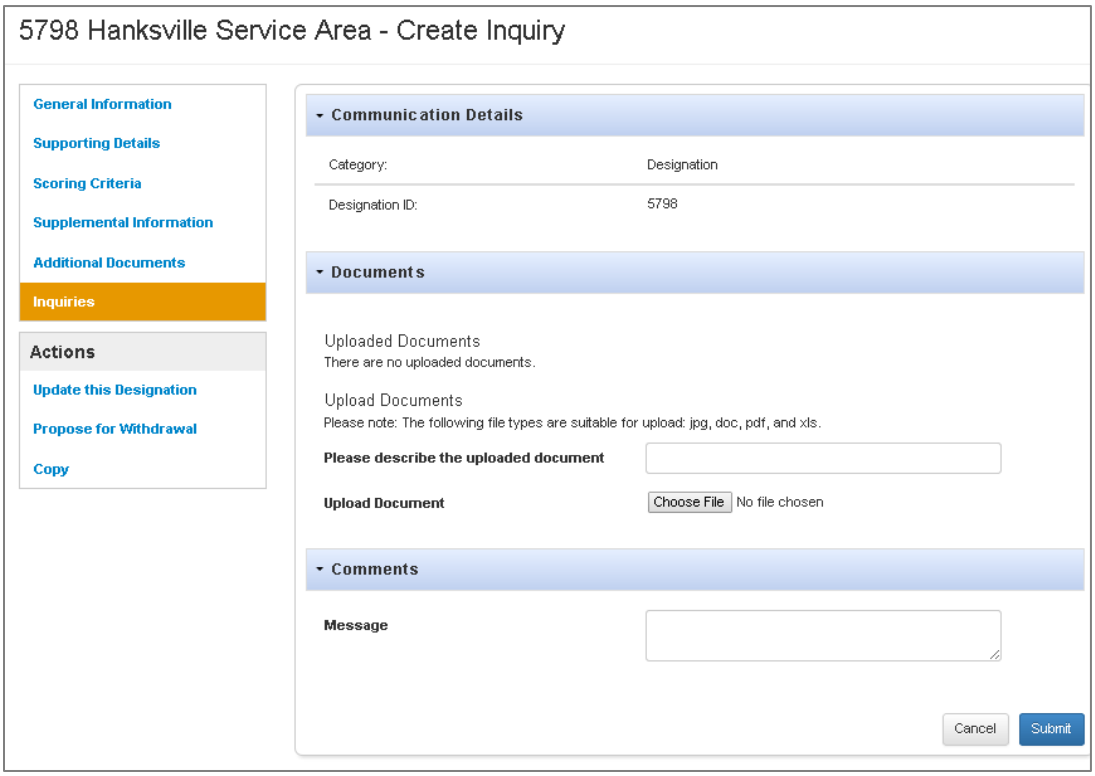
The Inquiries page displays upon selection of the "Inquiries" tab from the designation profile. The Inquiries page will display existing inquiries for the designation in a table within the page. From this page, the user may choose to create a new inquiry or view an existing inquiry to provide more information or view follow-up information provided by the Project Officer.



1. **"Create New Inquiry"**: This button should be selected if the user would like to create a new inquiry.
2. **Inquiry ID**: The user has the option to view an existing inquiry by selecting the Inquiry ID.

CREATE NEW INQUIRY

The Create New Inquiry page displays when the user selects the Create New Inquiry button from the Inquiries page.



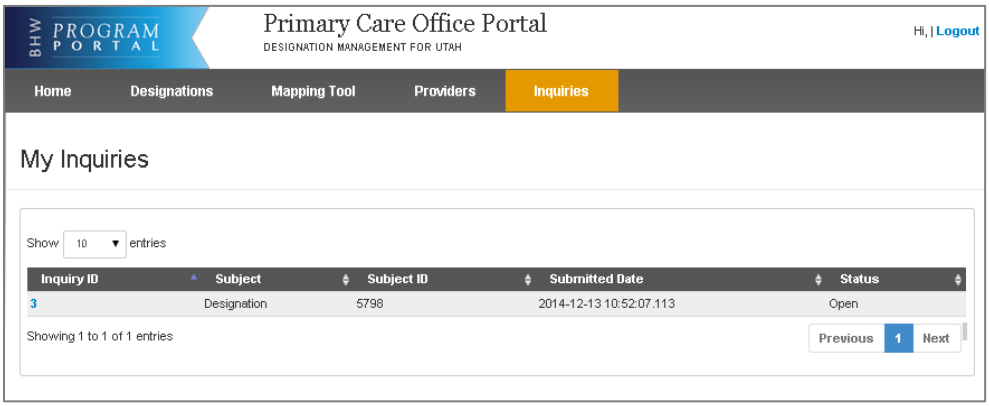
1. **Document Description**: The user must provide a description of the uploaded document prior to selecting Upload.
2. **"Choose File"**: To select a file for upload, the Choose File button must be initiated.
3. **Message**: The user has the option to provide comments to the Project Officer via the Message field. The comments sent to the Project Officer as well as the Project Officer responses will display in the table within the Comments section.
4. **"Submit"**: This button should be selected when the user is ready to submit the Inquiry.
5. **"Cancel"**: This button will cancel the inquiry creation and return the user to the Inquiries page.

Business Rules:

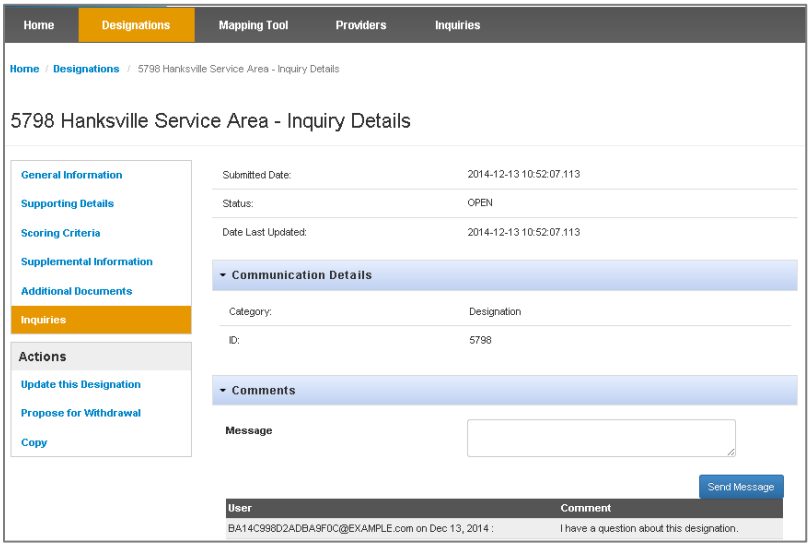
- The Submit button must be initiated for the message to be transmitted to the Project Officer.
- The Document Description must be entered for the file to upload successfully.
- The inquiry will be created upon the user hitting the Submit button and be visible from the Inquiries page.

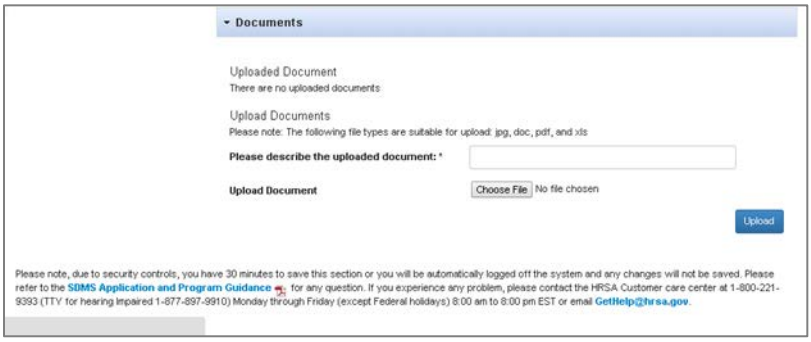
VIEW/EDIT AN EXISTING INQUIRY

An inquiry may be accessed via the Inquiry Tab on the Designation Profile. Additionally, a user may view all open inquiries for their respective state by navigating to the Inquiries Tab at the top of the navigation panel.



The Inquiry Details display when the user selects the Inquiry ID to view an existing inquiry.





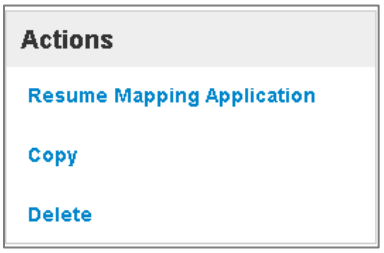
1. **Message**: The user has the option to provide additional comments to the Project Officer via the Message field. The comments sent to the Project Officer as well as the Project Officer responses will display in the table within the Comments section.
2. **"Send Message"**: The user must select the Send Message button after entering in desired comments to the Project Officer to provide information for the inquiry.
3. **Document Description**: The user must provide a description of the uploaded document prior to selecting Upload.
4. **"Upload"**: This button should be selected once the user would like to upload a document.

Business Rules:

- The "Send Message" button must be initiated for the message to be transmitted to the Project Officer.
- The Document Description must be entered for the file to upload successfully.

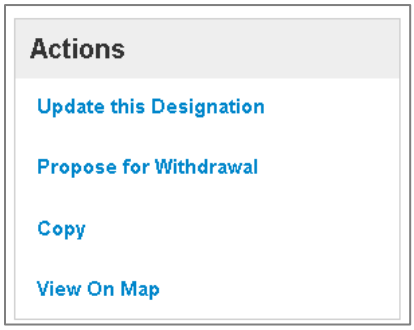
X. ACTIONS

The Actions section of the Designation profile is dynamic based on the status the designation is in. The following actions will be available for an in progress HPSA or MUAP designation:



1. **Resume Mapping Application**: This link will direct the user back to the mapping tool to complete the in progress designation. The user will be taken to the exact step of where the application was previously saved. All work completed before exiting the mapping tool will be saved and displayed on the map.
2. **Copy**: This link will direct the user through the same process as the copy link located on the Designation search page discussed in section 6A.
3. **Delete**: This link will direct the user through the same process as the delete link location on the Designation Search page discussed in section 6B.

The following actions will be available for a HPSA or MUAP with a status of designated:



1. **Update this Designation**: This link will direct the user to the mapping tool to complete an updated application for the designation.
2. **Propose for Withdrawal**: This link will direct the user to propose to withdrawal a current designation.
3. **Copy**: This link will direct the user through the same process as the copy link located on the Designation search page discussed in section 6A.
4. **View on Map**: This link will launch the mapping application to a zoomed-in view of the associated RSA with no information panels open. While the user can select a basemap, enable layers, and view data for the associated area. Note that while the map is viewable, the status of the designation is not affected.
   See the Mapping Tool User Guide for more information on the tool's functionality.

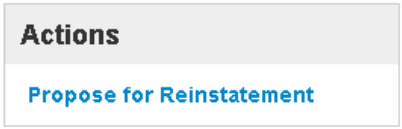
Important Information to Note: No actions will be available for a Withdrawn migrated HPSA or MUAP from ASAPS as the geometries were not available for migration into the Shortage Designation Management System. Designations in all other statues not mentioned above will only have Copy as an action selection.

The following actions will be available for an in progress Facility designation:

The following actions will be available for a Designated Facility:

1. **Update this Designation**: This link will direct the user to the facility application to complete an updated application for the designation.
2. **Propose for Withdrawal**: This link will direct the user to propose to withdrawal a current designation.

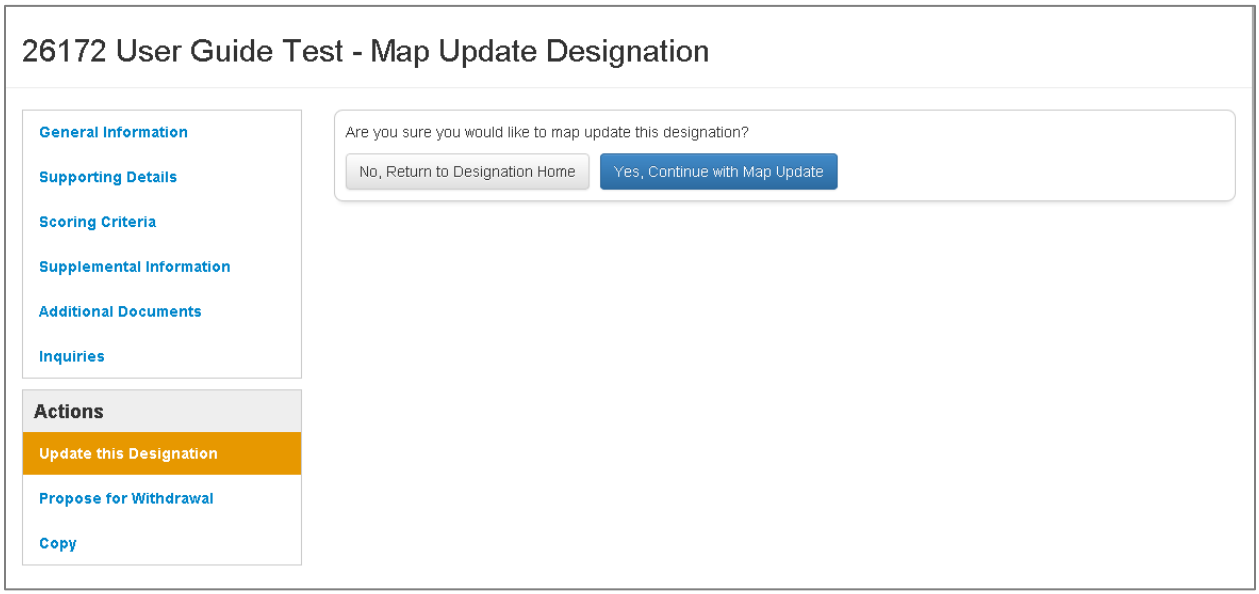
The following action will be available for a withdrawn Facility designation:



1. **Propose for Reinstatement**: This link will direct the user to the facility application to complete a application for reinstatement.

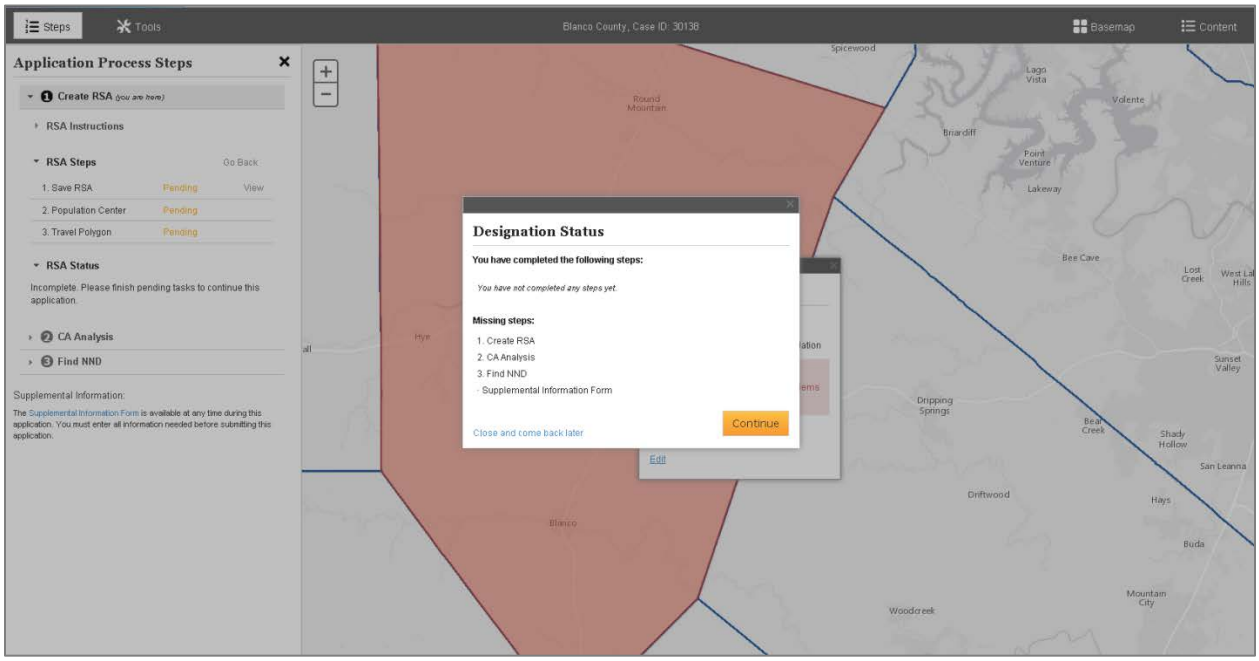
XI. UPDATING A DESIGNATION

All designations, whether migrated or new, that have a status of designated have the ability to be updated by the user. Updating designations will follow the same business rules and functionality as creating a new application with the Mapping Tool, please reference section 5.



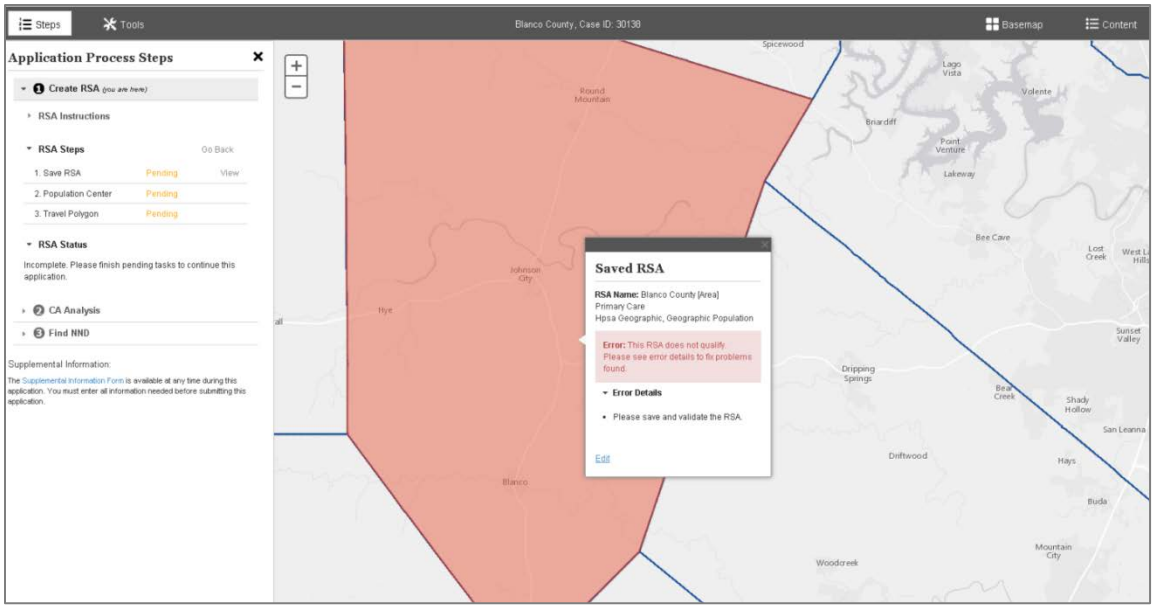
1. **"Update the Designation"**: The user will be directed to the page above once this button is clicked on during any portion of the Designation Profile.
2. **"No, Return to Designation Home"**: Upon selecting this button, the user will be directed back to the general information section of the Designation Profile.
3. **"Yes, Continue Map Update"**: Upon selecting this button, the user will be directed to the mapping tool to complete an update for the specific designation.

Once the user selects “Yes, Continue Map Update”, the system will direct the user to the following image:

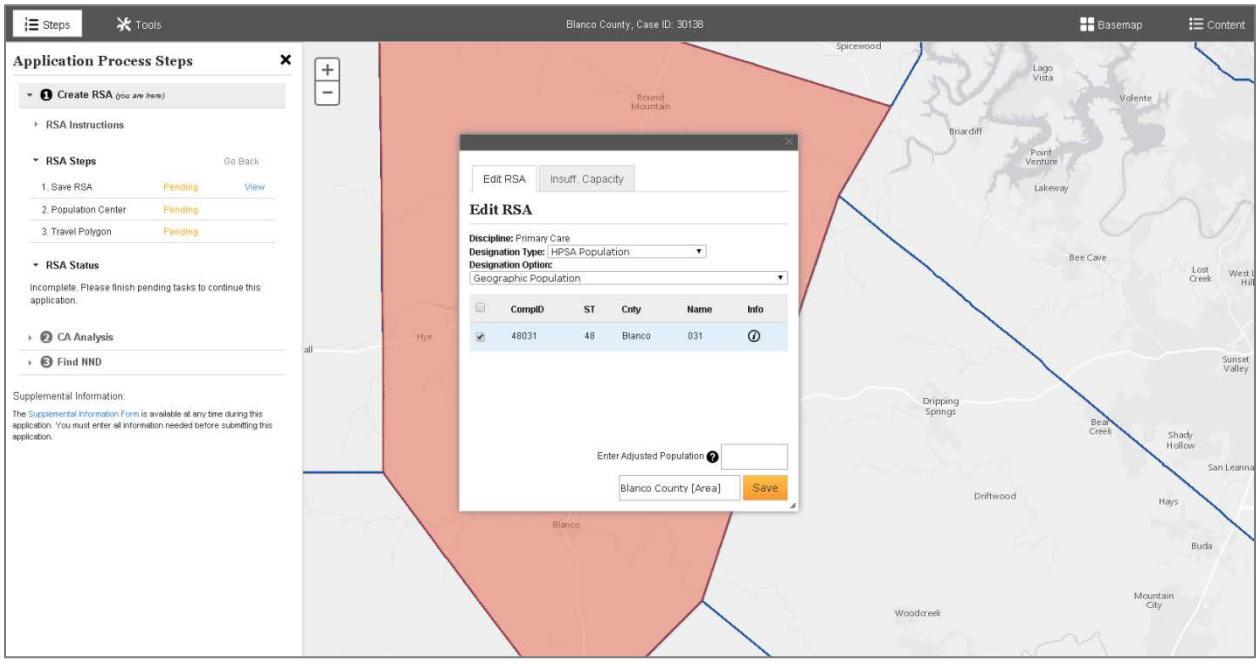


The system will direct the user back to the RSA step of the Mapping tool. The original RSA geometry will be visible and once the user selects the “Continue” button, the user will be directed to the Mapping Tool to complete the updated application.

Important Information to Note: For all migrated Designations from ASAPS, only the RSA geometries were available for migration. The Contiguous Area geometries from ASAPS were unavailable to be migrated into the Shortage Designation Management System. This means that the user will have to create the Contiguous Areas with the Mapping Tool for all migrated designations.

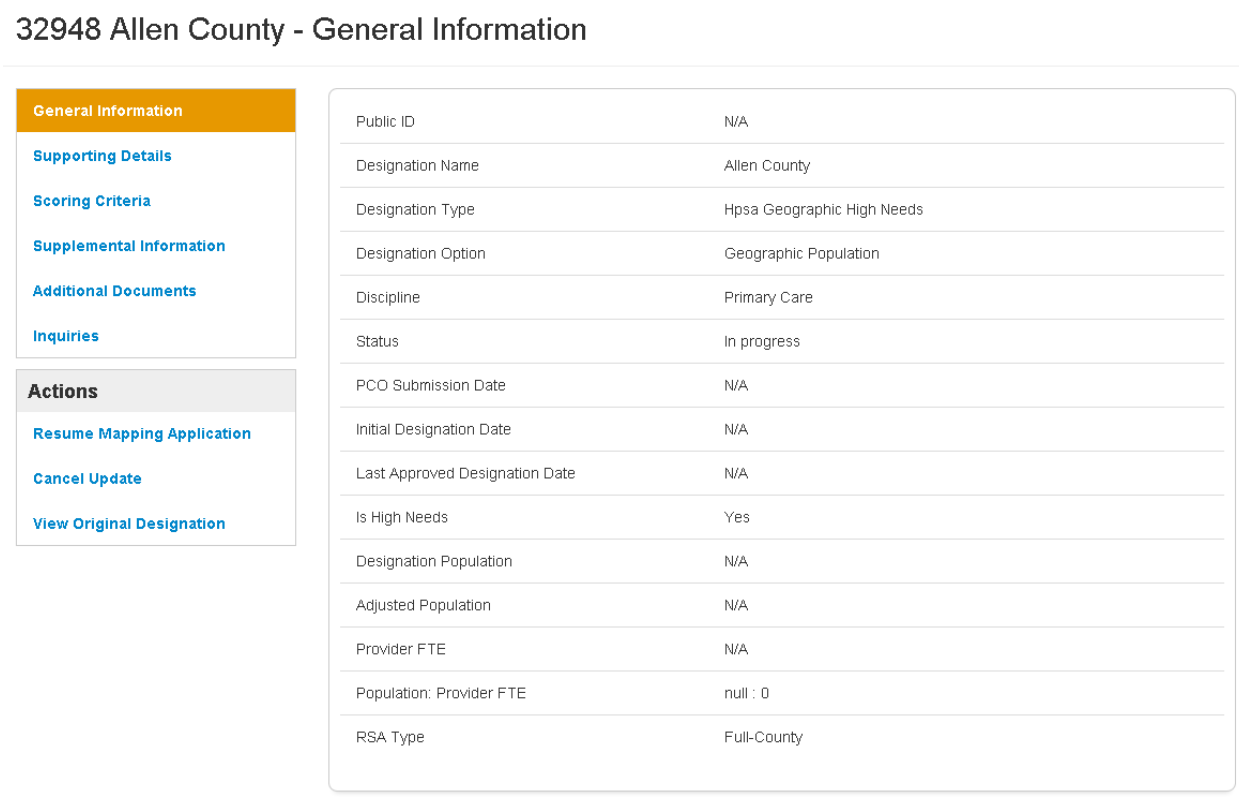


The first step of updating a designation is to save and validate the RSA. The user should select the “Edit” link to save the RSA or add and delete components as desired, as displayed below. Once the RSA is saved, the user should continue with the application just like explained in section 5 of the user guide.



XII. CANCELING AN UPDATE

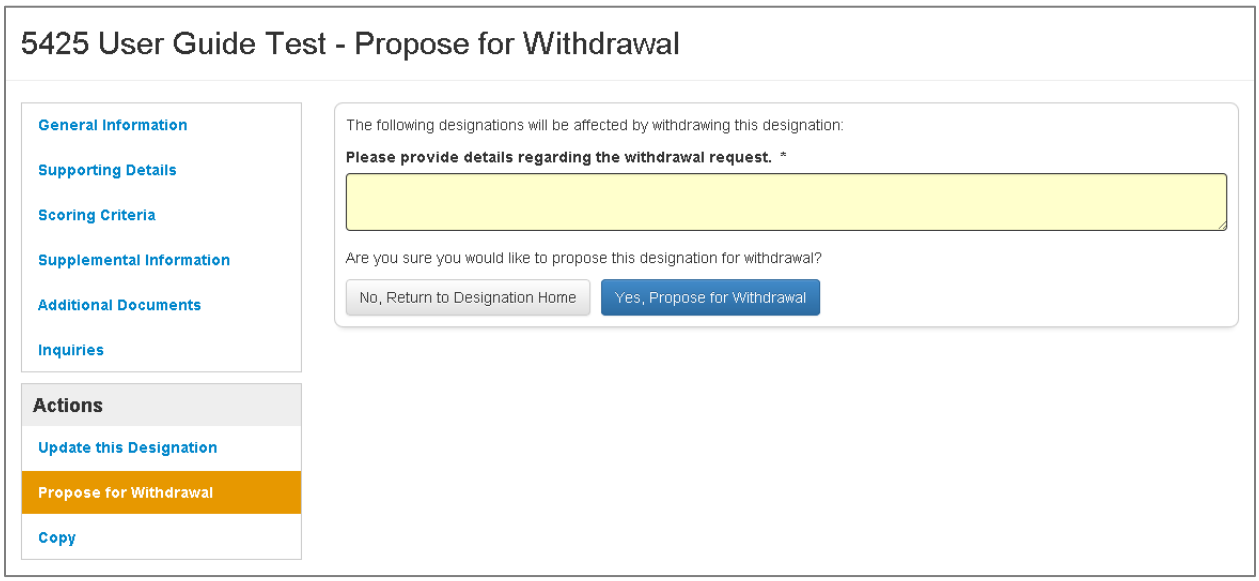
If the user would like to cancel an update of a current designation, the user will need to navigate to the designation profile of the update application.



1. **Cancel Update:** The user should select this action to cancel the update. Once canceled, the user will be able to complete a new update, if desired. **Important Information to Note:** The delete button on the search results will not be applicable for update applications.

XIII. PROPOSE FOR WITHDRAWAL

The user has the ability to propose for withdrawal any HPSA, MUAP, OFAC or State/County Mental Hospital designation with a status of Designated.

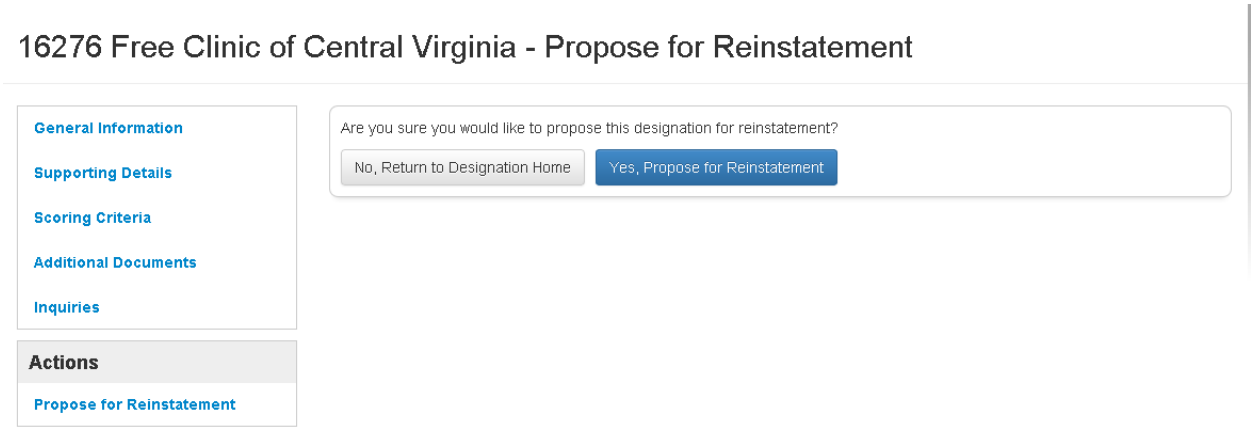


1. **"Propose for Withdrawal"**: The user will be directed to the page above once this button is clicked on during any portion of the Designation Profile.
2. **"No, Return to Designation Home"**: Upon selecting this button, the user will be directed back to the general information section of the Designation Profile.
3. **"Yes, Propose for Withdrawal"**: Upon selecting this button, the system will submit the designation to review for proposed for withdrawal.

Important Information to Note: The user must enter an explanation in the text box on this page in order to submit the designation for proposed for withdrawal.

IX. PROPOSE FOR REINSTATEMENT

The user has the ability to propose for withdrawal OFAC or State/County Mental Hospital designation with a status of Designated.



1. **"Propose for Reinstatement"**: The user will be directed to the page above once this button is clicked on during any portion of the Designation Profile.
2. **"No, Return to Designation Home"**: Upon selecting this button, the user will be directed back to the general information section of the Designation Profile.
3. **"Yes, Propose for Reinstatement"**: Upon selecting this button, the system will direct the user to the facility application. Please see the Facility Form User Guide for more information.