



# Shortage Designation Management System (SDMS)

## PCO Provider Management User Guide

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**Public Burden Statement:** The purpose of this information collection is to obtain performance data for the following: HRSA Grantees and cooperative agreement recipients, programs operations, and surveys. In addition, these data will facilitate the ability to demonstrate alignment between BHW discretionary programs, State Primary Care Offices (PCOs), and Shortage Designation Management System (SDMS). An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB control number for this information collection is 0906-0029 and it is valid until xx/xx/xxxx. Public reporting burden for this collection of information is estimated to average 5.46 hours per response, including the time for reviewing instructions, searching existing data sources, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to HRSA Reports Clearance Officer, 5600 Fishers Lane, Room 14N136B, Rockville, Maryland, 20857.





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## SHORTAGE DESIGNATION MANAGEMENT SYSTEM (SDMS) OVERVIEW

**Goal:** The Shortage Designation Management System is used to manage, create, and update designations, and to manage and update provider records in support of designations. The foundation of the Shortage Designation Management System comes from nationally sourced data and the policies and procedures of the Division of Policy and Shortage Designation (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
- Review and update POC-submitted designations
- Create and manage inquiries
- Create and update provider location records

**Roles:** The shortage designation role is required to be part of the PCO user account in order to have 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.

## CONTENT OF THIS USER GUIDE

This user guide covers provider management functionality and business rules. For further information on designation and user management related functionality and business rules, refer to the Designation Management User Guide and User Management User Guide on your SDMS Portal Home Page.





## 1. SHORTAGE DESIGNATION MANAGEMENT SYSTEM (SDMS) MAIN PAGE

The purpose of the Shortage Designation Main Page is for the PCO to view important updates, access helpful resources and access the Designations portal, Providers portal, User Management portal, and Inquiries and Report functionalities. The user can access this page by selecting “Link to the Shortage Designation Main Page” on the main portal homepage.

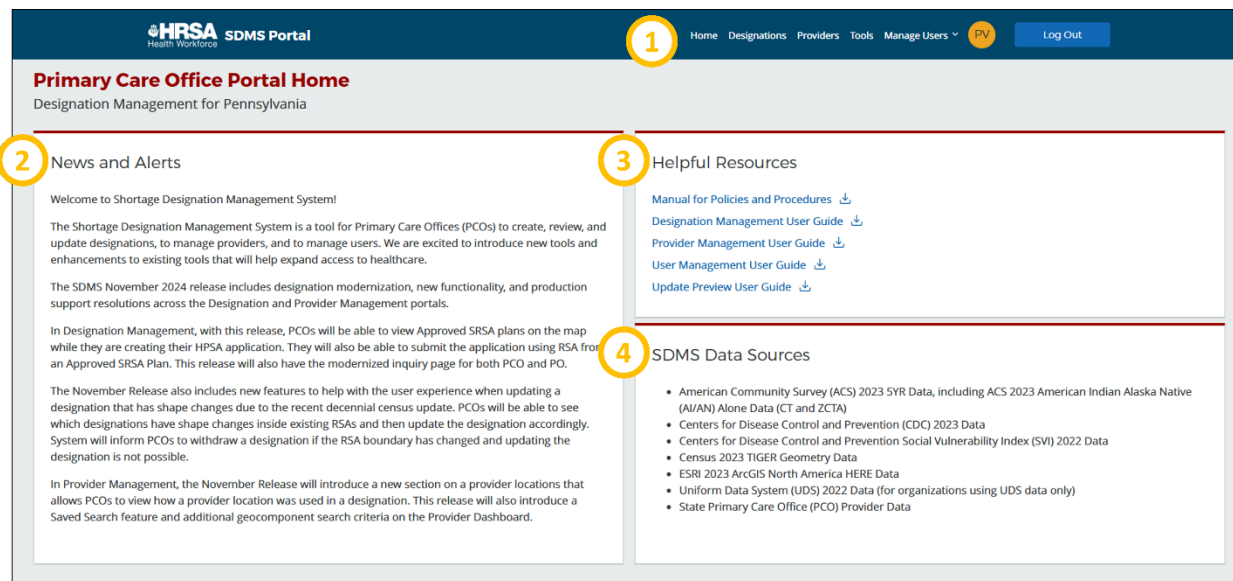


Figure 1: PCO Shortage Designation Main Page

Feature	Description
1. Navigation Panel	The user may navigate to other sections of the PCO Portal using this toolbar. Several of these menu items have sub-menus when clicked.
2. News and Alerts	This section provides the user with new information and updates pertaining to Shortage Designation Management.
3. Helpful Resources	This section provides the user with resources on the policies and procedures of SDMS.
4. SDMS Data Sources	This section lists the data sources currently being used in SDMS.

From the Shortage Designation Main Page Navigation Panel, PCOs can access:

- SDMS Mapping tool (via the Designations Portal) to create and update designations
- Designations Portal (Search for and View Designations, View HPSA Data on the Informational Mapping Tool, Manage Tasks in My Activities, View Auto-HPSA and Geographic and Population Update Preview Results)
- Auto-HPSA Designations Portal (via the Designations Portal) to view and rescore Auto-HPSAs





- Provider Management Portal (Manage Provider Data Sources, Search for Providers, View Provider Profiles and Locations, Download Provider State Reports, Use Provider Import Tool, Manage Provider Review Tasks)
- Tools
- User Management Portal (Manage Auto-HPSA Points of Contact, Manage Stakeholder Notifications)





## 2. PROVIDER MANAGEMENT PORTAL

The SDMS Provider Management Portal uses a data set from the Center for Medicaid and Medicare's (CMS) National Plan and Provider Enumeration System (NPPES). Providers that have a unique identifier known as an NPI (National Provider Identifier) from CMS are imported to SDMS on a weekly basis. Once providers are imported to SDMS, state PCOs can maintain and update data about the provider's practice locations to be used in HPSA designations.

In the SDMS Provider Management Portal, PCOs can search for providers and update provider information across their state. PCOs can update providers by editing provider information through the Provider Search table, making updates directly to a provider location, or by importing bulk provider updates using the Import Tool. PCOs can manage provider locations that require review through the Provider Dashboard.

Users can navigate to the Provider Management Portal by selecting "Providers" in the Navigation Panel where they will be directed to the Provider Management Landing Page.

**HRSA Provider Management**

Home Designations Providers Tools Manage Users VV Log Out

### Provider Management

#### Provider Dashboard

[Go to Dashboard](#)

<b>7</b> System Action Pending in the next 30 days <a href="#">View Tasks</a>	<b>384</b> Complete Annual Provider Location Attestation <a href="#">View Tasks</a>	<b>312</b> Review Direct Tour Hours Greater than 40 <a href="#">View Tasks</a>	<b>115</b> Review New Provider Location <a href="#">View Tasks</a>	<b>1</b> Geocoding Issues <a href="#">View Tasks</a>	<b>1,339</b> NPPES Updates <a href="#">View Tasks</a>
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#### Provider Search

Enter one or more of the following criteria to search for providers.

<b>State</b> Select State	<b>County Name</b> Select County Name
<b>Discipline</b> Select Discipline	<b>Specialty</b> Select Specialty
<b>First Name</b> Enter First Name	<b>Last Name</b> Enter Last Name
<b>NPI</b> Enter NPI Number	<b>Status</b> <input type="radio"/> Eligible <input type="radio"/> Ineligible

[Search](#) [Clear](#) [Go to Advanced Search](#)

#### Provider Bulk Actions

Use these tools to add, update, and omit provider data in bulk.

Create and manage system-generated Excel files to update provider data in bulk.

Address provider locations with the "Complete Annual Provider Location Attestation" Needs Review flag.

[Manage Provider Uploads](#) [Attest Provider Locations](#)

#### Provider Data Sources

Upload and manage data sources used for updating providers.

[Manage Data Sources](#)

Figure 2: Provider Management Landing Page





## 2.1 MANAGING PROVIDER DATA SOURCES

PCOs can navigate to Provider Data Sources from the Provider Management Landing Page. On this page, PCOs can upload and manage data sources used for updating provider locations.

Figure 3: Accessing the Provider Data Sources Page from the Provider Management Landing Page

Figure 4: Provider Data Sources





## Feature

### 1. Provider Data Sources Search

## Description

This section allows users to search for uploaded provider data sources. For more information about searching for provider data sources, see *Section 2.1.3 Searching For Provider Data Sources*.

### 2. (Upload New Data Source Button)

This button allows PCOs to upload new provider data sources. For more information on how to upload provider data sources see *Section 2.1.1 Uploading Provider Data Sources*.

### 3. File Name

This field displays the name of the uploaded file. Users can download a copy of the file by clicking on the File Name.

### 4. Data Source Name

This field displays the short, descriptive name assigned to the file by the PCO upon upload. This Data Source Name will display in the Data Source drop-down when editing provider locations and on provider locations if selected by PCOs.

For more information about viewing supporting details, see *Section 2.4.9 Viewing Supporting Details*.

### 5. Data Source Agency

This field displays the name of the agency or organization that published the provider data source identified by the PCO upon upload.

### 6. Data Source Date

This field displays the date the data source was published as indicated by the PCO upon upload. This Data Source Date will display on provider locations if selected by PCOs.

For more information about viewing supporting details, see *Section 2.4.9 Viewing Supporting Details*.

### 7. Uploaded User

This field displays the email of the PCO who uploaded the file. PCOs can view all provider data sources uploaded to their state, regardless of who uploaded it.

### 8. Uploaded Date

This field displays the date the file was uploaded by the PCO.

### 9. Status

This field displays the status of the provider data source assigned by the PCO. Status selections include:

- Current
- Archive

### 10. (Actions Drop-down)

This drop-down allows PCOs to update uploaded provider data sources. For more information about editing provider data sources, see *Section 2.1.2 Updating Provider Data Sources*.

While uploading a provider data source, PCOs can indicate which editable fields on a provider location this data source applies to. The following fields can be selected as relevant fields for a provider data source:

- Annual Medicaid Claims
- Dental Auxiliaries
- Direct Tour Hours
- Discipline
- Federal Provider?
- Homeless %



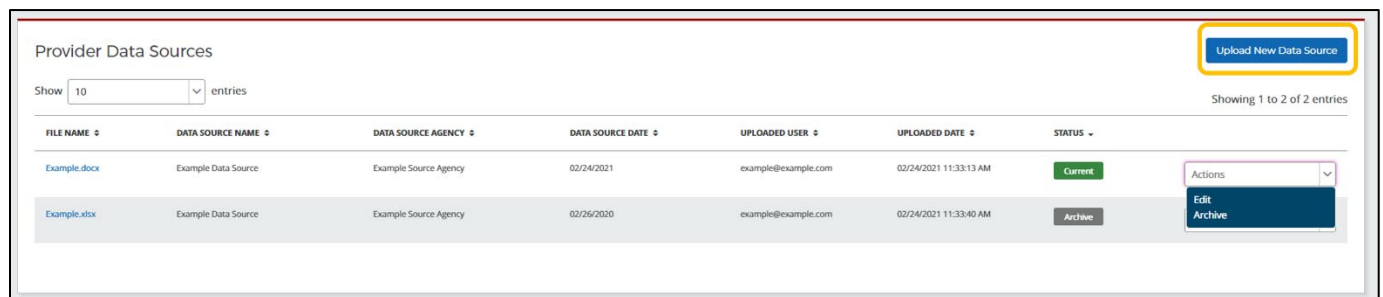


- Intern or Resident?
- J1 Visa Waiver Holder?
- Location Address (New and Copied)
- Medicaid Patient %
- Migrant Farmworker %
- American Indian/Alaska Native %
- Organizational NPI
- PCO Omitted Reason
- Site Type
- Specialty

Once a relevant field has been selected for a provider data source, that data source will appear as an option in the Data Source drop-downs when editing provider locations. For more information about updating provider locations, see *Section 2.5.2 Updating Provider Locations*.

### 2.1.1 UPLOADING PROVIDER DATA SOURCES

New data sources can be uploaded to clicking the “Upload New Data Source” button. PCOs may only upload files to their assigned state.



FILE NAME	DATA SOURCE NAME	DATA SOURCE AGENCY	DATA SOURCE DATE	UPLOADED USER	UPLOADED DATE	STATUS
Example.docx	Example Data Source	Example Source Agency	02/24/2021	example@example.com	02/24/2021 11:33:13 AM	Current
Example.xlsx	Example Data Source	Example Source Agency	02/26/2020	example@example.com	02/24/2021 11:33:40 AM	Archive

Figure 5: Upload New Data Source Button

## INSTRUCTIONS

To upload provider data sources:

1. Click on the “Upload New Data Source” button. A pop-up will open titled “Upload New Data Source”
2. Select the file to be uploaded
3. Enter the short, descriptive name that should be displayed in the Data Source drop-downs in the “Data Source Name” field
4. Enter the name of the agency or organization that published the file in the “Data Source Agency” field
5. Select the date the file was published in the Data Source Date field
6. Select the status of the file
7. Select the fields on a provider location this data source applies to in the Relevant Fields drop-down
8. Click “Save” to upload the new provider data source file. Users can click “Cancel” at any time if they no longer want to upload the file





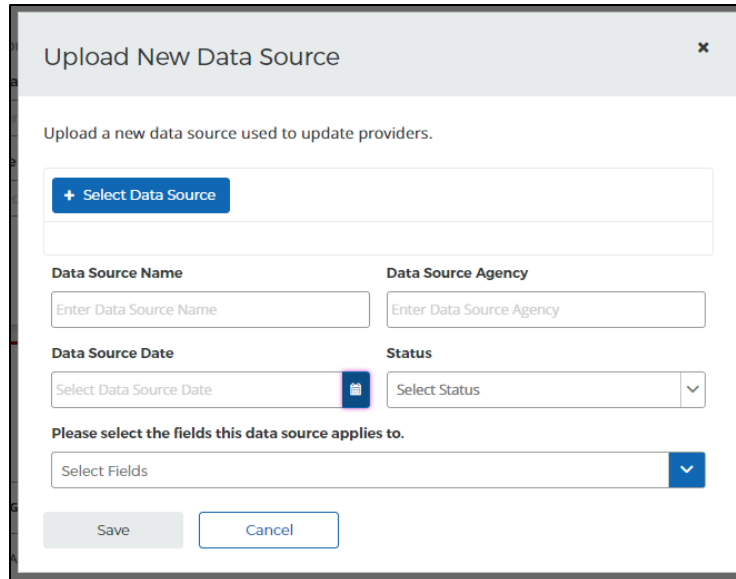
The image shows a web-based form titled "Upload New Data Source" with a close button (X) in the top right corner. Below the title is a subtitle: "Upload a new data source used to update providers." The form contains several input fields and buttons. At the top is a large button labeled "+ Select Data Source". Below this are four input fields arranged in two rows: "Data Source Name" (with placeholder text "Enter Data Source Name"), "Data Source Agency" (with placeholder text "Enter Data Source Agency"), "Data Source Date" (with placeholder text "Select Data Source Date" and a calendar icon), and "Status" (a dropdown menu with placeholder text "Select Status"). Below these fields is a section titled "Please select the fields this data source applies to." with a dropdown menu labeled "Select Fields". At the bottom of the form are two buttons: "Save" and "Cancel".

Figure 6: Upload New Data Source Pop-Up

A success banner will display at the top of the page once the file has been uploaded.



Figure 7: Success Banner when Uploading a New Provider Data Source

## USER NOTES

- PCOs may upload the following file types: Rich Text Format, Word, PDF, Excel (.xls, .xlsm, .xlsx), and Image files (.jpeg, .gif, .bpm, .tiff)
- PCOs may upload file sizes up to 100 MB
- PCOs may only enter up to 100 characters for the Data Source Name and Data Source Agency. Special characters are allowed
- PCOs cannot select future dates when entering the Data Source Date

### 2.1.2 UPDATING PROVIDER DATA SOURCES

Once a file has been uploaded to the Provider Source Data Portal, it cannot be deleted. PCOs can update the user-entered information about a provider data source and change the status of the data source using the "Actions" drop-down menu.





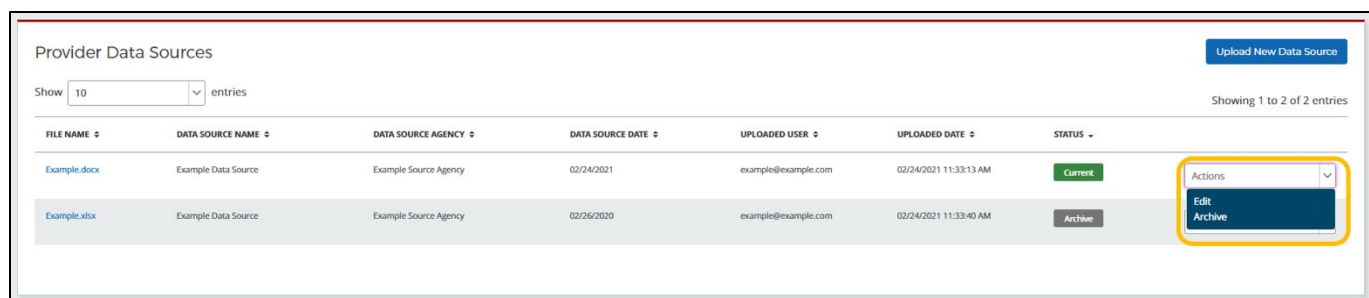


Figure 8: Provider Data Sources Actions Drop-Down Menu

### 3.1.2A EDITING PROVIDER DATA SOURCES

PCOs can edit the user-entered information associated with a data source and the relevant fields the data source applies to on a provider location by selecting “Edit Data Source” from the “Actions” drop-down menu. PCOs cannot edit the file itself, the uploaded user, or the uploaded date once the file has been uploaded.

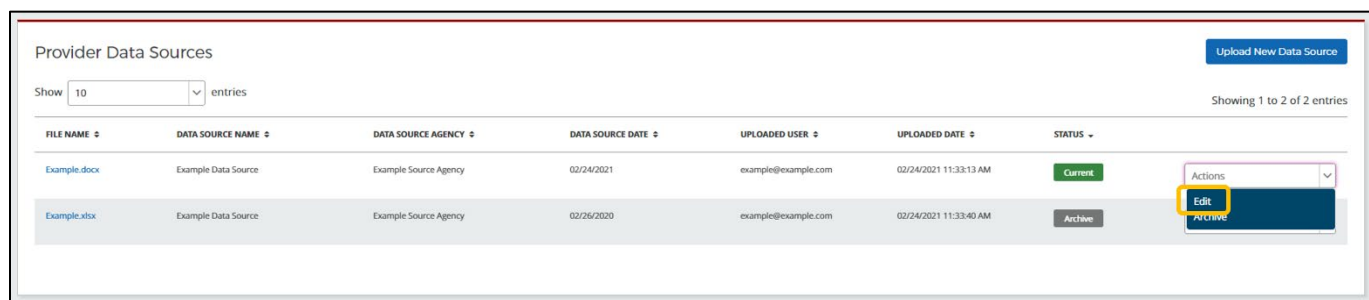


Figure 9: Edit Option in the Actions Drop-down Menu

## INSTRUCTIONS

To edit an uploaded provider data source:

1. Click on the “Actions” drop-down next to the desired provider data source
2. Select the “Edit” option. A pop-up will open titled “Edit Data Source”
3. Edit any of the user-entered fields:
  - a. Data Source Name
  - b. Data Source Agency
  - c. Data Source Date
  - d. Relevant Fields on Provider Locations
4. Click “Save” to save the edits to the provider data source. Users can click “Cancel” at any time if they no longer want to edit the provider data source information





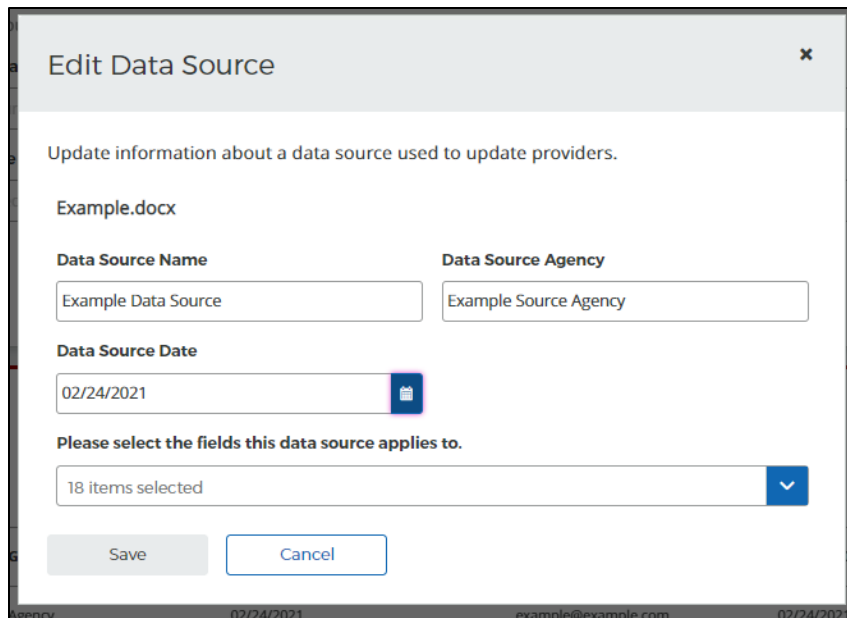
The image shows a modal dialog box titled "Edit Data Source" with a close button (X) in the top right corner. Inside the dialog, there is a heading "Update information about a data source used to update providers." followed by the filename "Example.docx". Below this are two input fields: "Data Source Name" containing "Example Data Source" and "Data Source Agency" containing "Example Source Agency". Underneath is a "Data Source Date" field with "02/24/2021" and a calendar icon to its right. A label "Please select the fields this data source applies to." is followed by a dropdown menu showing "18 items selected" and a downward arrow. At the bottom are "Save" and "Cancel" buttons. A footer bar at the very bottom of the dialog contains the text "Agency: 02/24/2021 example@example.com 02/24/2021".

Figure 10: Edit Data Source Pop-Up

A success banner will display at the top of the page once the edits have been saved.



Figure 11: Success Banner when Editing a Provider Data Source

## USER NOTES

- The file name will appear as read-only. PCOs will not be able to change, edit, or delete the file once it has been uploaded
- The Save button will not be enabled unless the PCO makes at least one change to the Provider Data Sources
- PCOs may only enter up to 100 characters for the Data Source Name and Data Source Agency. Special characters are allowed
- PCOs cannot select future dates when entering the Data Source Date

### 3.1.2B CHANGING THE STATUS OF PROVIDER DATA SOURCES

PCOs can change the status of a provider data source using the “Actions” drop-down menu. If a PCO is no longer using a file to make updates on provider locations, they should change the status to “Archive”. Only provider data sources with a status of “Current” will appear as option in the Data Source drop-downs on a provider location.





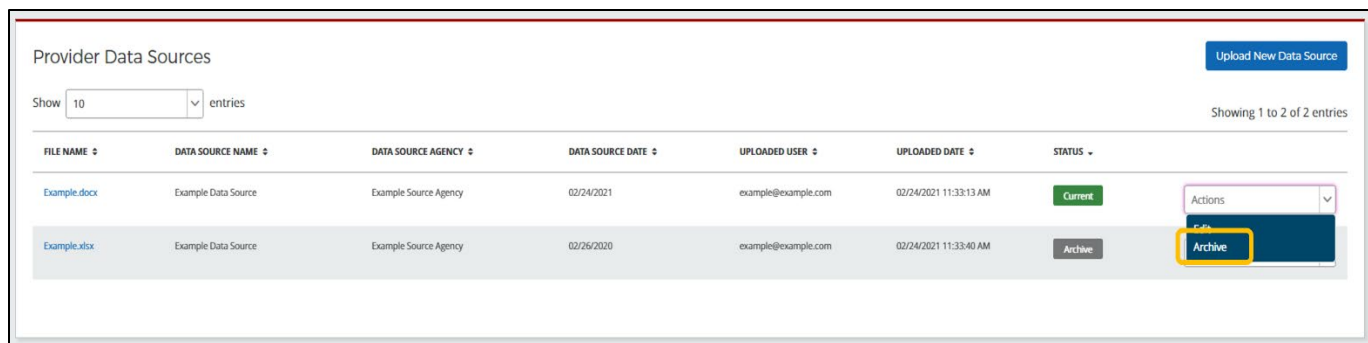


Figure 12: Archive Option in the Actions Drop-down Menu

## INSTRUCTIONS

To change the status of a provider data source:

1. Click on the "Actions" drop-down next to the desired provider data source
2. Select the "Archive" or "Current" button. The available selection will depend on the status of the chosen provider data source
3. The provider data source will now display the updated status

The status of the provider data source will update automatically, and a success banner will display at the top of the page. No further action by the PCO is needed.

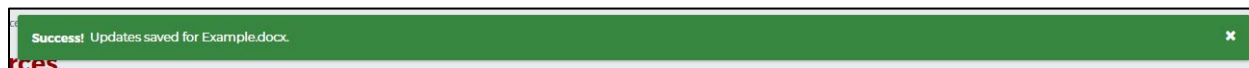


Figure 13: Success Banner when Changing the Status of a Provider Data Source

### 2.1.3 SEARCHING FOR PROVIDER DATA SOURCES

PCOs can search across all provider data sources uploaded in their state, regardless of who uploaded the file.

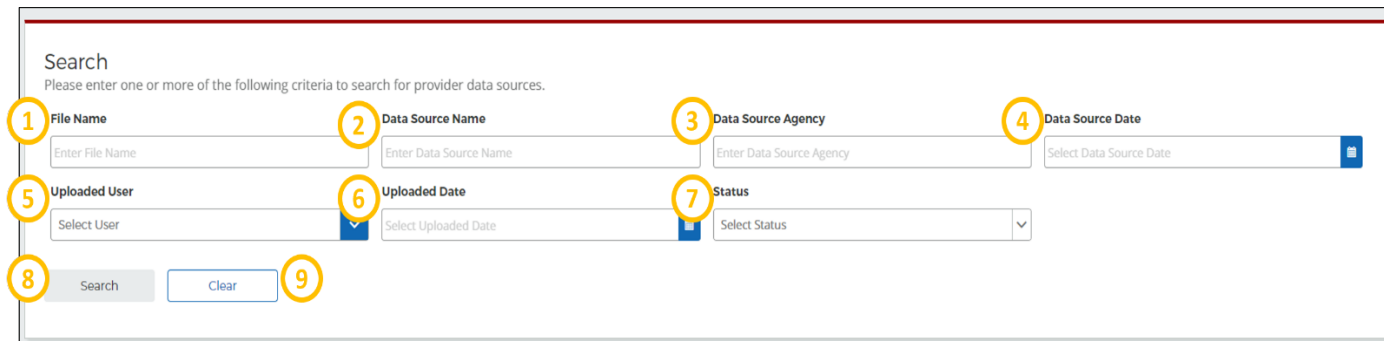

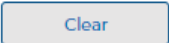


Figure 14: Provider Data Sources Search





Feature	Description
1. File Name	This field allows users to search for provider data sources by the name of uploaded file.
2. Data Source Name	This field allows users to search for provider data sources by the short, descriptive Data Source Name assigned to the file.
3. Data Source Agency	This field allows users to search for provider data sources by the agency or organization that published the data sources.
4. Data Source Date	This field allows users to search for provider data sources by the date the file was originally published. Users can search by a single date or by date ranges.
5. Uploaded User	This field allows users to search for provider data sources by the PCO who uploaded the file.
6. Uploaded Date	This field allows users to search for provider data sources by the date when the file was uploaded. Users can search by a single date or by date ranges.
7. Status	This field allows users to search for provider data sources by the status assigned to the file.
8.  (Search Button)	When the desired fields are selected, users should click the Search button to initiate the search. At least one field must be selected before the Search button is enabled.
9.  (Clear Button)	Users may select this button to clear the fields used during a search. Selecting the “Clear” button on this page will also remove the search results from view.





## 2.2 SEARCHING FOR PROVIDERS

PCOs can use the Provider Search and its predefined list of search criteria to search for providers, view a table display of provider location search results where PCOs can edit provider information, and download search results in a macro-enabled Excel file to make bulk updates through the Import Tool.

On the Provider Search, PCOs can view providers across all states and territories but can only edit providers within their assigned states (the state associated with the PCO's user account) or foreign countries. From the Search page, users can navigate to provider profiles and locations.

### 2.2.1 USING THE BASIC SEARCH

Users can conduct a basic search from the Provider Management Landing Page.


The screenshot shows the HRSA Provider Management interface. At the top is a navigation bar with links for Home, Designations, Providers, Tools, and Manage Users, along with a user profile icon and a Log Out button. Below the navigation bar is a 'Provider Management' header. The main content area is divided into two columns. The left column contains a 'Provider Dashboard' with six summary cards: '7 System Action Pending in the next 30 days', '384 Complete Annual Provider Location Attestation', '312 Review Direct Tour Hours Greater than 40', '115 Review New Provider Location', '1 Geocoding Issues', and '1,339 NPPES Updates'. Each card has a 'View Tasks' link. To the right of the dashboard is a 'Go to Dashboard' button. Below the dashboard is the 'Provider Search' section, which includes a search criteria form with fields for State, County Name, Discipline, Specialty, First Name, Last Name, NPI, and Status. The form has a 'Search' button and a 'Clear' button. To the right of the search form is a 'Provider Bulk Actions' section with two buttons: 'Manage Provider Uploads' and 'Attest Provider Locations'. Below the bulk actions is a 'Provider Data Sources' section with a 'Manage Data Sources' button. The search form is annotated with numbered callouts: 1 points to the State dropdown, 2 points to the County Name dropdown, 3 points to the Discipline dropdown, 4 points to the Specialty dropdown, 5 points to the First Name text input, 6 points to the Last Name text input, 7 points to the NPI text input, 8 points to the Status radio buttons, 9 points to the Search button, and 10 points to the Clear button.

Figure 15: Basic Search on the Provider Management Landing Page

Feature	Description
1. State	This field allows users to search for providers by any state, territory, or Foreign Country.
2. County Name	This field allows users to search for providers by one or multiple counties in a particular state. This field will only be enabled once a state or territory has been selected. When a "County Name" is selected, the system will also populate the "County FIP" drop-down with its corresponding value.





Feature	Description
	Search results will return providers that have been geocoded to the County.
<b>3. Discipline</b>	<p>This field allows users to search for providers by one or multiple disciplines. Discipline selections include:</p> <ul style="list-style-type: none"><li>• Primary Care</li><li>• Dental Health</li><li>• Mental Health</li></ul>
<b>4. Specialty</b>	<p>This field allows users to search for providers by one or multiple specialties. This field can only be completed once a discipline has been selected. Once a discipline is selected, only the specialties that fall under that discipline will be available for selection. If multiple disciplines were selected, all specialties that apply will be available as drop-down menu options. Specialty selections include:</p> <ul style="list-style-type: none"><li>• If Primary Care is chosen:<ul style="list-style-type: none"><li>○ Certified Nurse Midwife</li><li>○ Family Practice</li><li>○ General Practitioner</li><li>○ Internal Medicine</li><li>○ Obstetrics and Gynecology</li><li>○ Pediatrics</li></ul></li><li>• If Dental Health is chosen<ul style="list-style-type: none"><li>○ Dentist</li></ul></li><li>• If Mental Health is chosen<ul style="list-style-type: none"><li>○ Psychiatrist</li><li>○ Clinical Social Psychologist</li><li>○ Clinical Social Worker</li><li>○ Psychiatric Nurse Specialist</li><li>○ Marriage and Family</li></ul></li></ul>
<b>5. First Name</b>	This field allows users to search for providers by their first name. Only exact matches will be returned.
<b>6. Last Name</b>	This field allows users to search for providers by their last name. Only exact matches will be returned.
<b>7. NPI</b>	This field allows users to search for providers by their National Provider Identifier (NPI). NPIs are unique 10-digit numerical identifiers assigned to providers by the Center for Medicare and Medicaid Services and imported into SDMS. Only exact matches will be returned.
<b>8. Status</b>	<p>This field allows users to search for providers by status. Status selections include:</p> <ul style="list-style-type: none"><li>• Eligible</li><li>• Ineligible</li></ul>
<b>9.  (Search Button)</b>	When the desired fields are selected, users should click the Search button to initiate the search. At least one field must be selected before the Search button is enabled.





## Feature

10.   
(Clear Button)

## Description

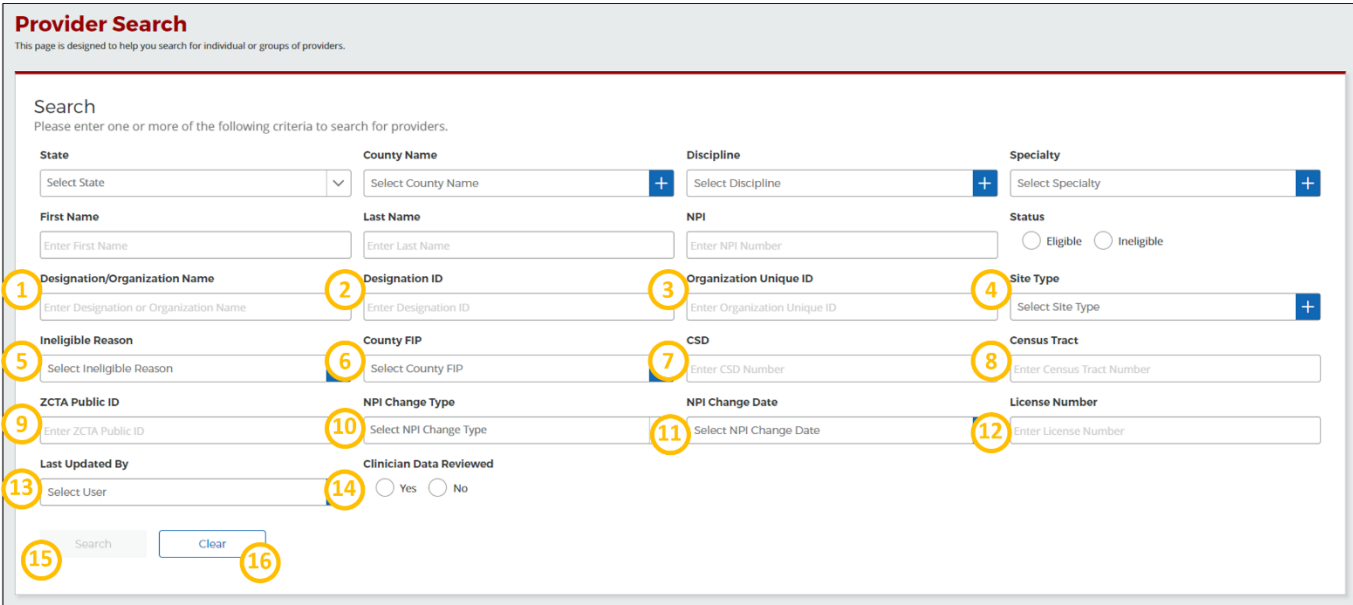
Users may click this button to clear the fields used during a provider search.

Users can conduct a more advanced search by clicking on the “Go to Advanced Search” link. This link will navigate users to the Advanced Search page.

Once the user clicks the Search button, they will be directed to the Advanced Search page to view results. On this page, any of the criterion they selected on the Basic Search will be prepopulated, and the search results will display. For information on viewing search results see *Section 2.2.3 Viewing Search Results*.

## 2.2.2 USING THE ADVANCED SEARCH

In addition to the criteria on the Basic Search on the Provider Management Landing Page, users can access additional search criteria on the Advanced Search Page.



**Provider Search**  
This page is designed to help you search for individual or groups of providers.

**Search**  
Please enter one or more of the following criteria to search for providers.

**State**  
Select State

**County Name**  
Select County Name

**Discipline**  
Select Discipline

**Specialty**  
Select Specialty

**First Name**  
Enter First Name

**Last Name**  
Enter Last Name

**NPI**  
Enter NPI Number

**Status**  
☐ Eligible ☐ Ineligible

**1 Designation/Organization Name**  
Enter Designation or Organization Name

**2 Designation ID**  
Enter Designation ID

**3 Organization Unique ID**  
Enter Organization Unique ID

**4 Site Type**  
Select Site Type

**5 Ineligible Reason**  
Select Ineligible Reason

**6 County FIP**  
Select County FIP

**7 CSD**  
Enter CSD Number

**8 Census Tract**  
Enter Census Tract Number

**9 ZCTA Public ID**  
Enter ZCTA Public ID

**10 NPI Change Type**  
Select NPI Change Type

**11 NPI Change Date**  
Select NPI Change Date

**12 License Number**  
Enter License Number

**13 Last Updated By**  
Select User

**14 Clinician Data Reviewed**  
☐ Yes ☐ No

**15 Search** **16 Clear**

Figure 16: Provider Advanced Search Page

## Feature

**1. Designation/Organization Name**

## Description

This field allows users to search for providers by the Designation or Organization Name of their site association.

**2. Designation ID**

This field allows users to search for providers by the Designation ID of their site association.

**3. Organization Unique ID**

This field allows users to search for providers by the Organization Unique ID of their site association. This field will only return results for provider locations associated to Auto-HPSA sites.





**Feature**

**Description**

**4. Site Type**

This field allows users to search for providers by their Site Type. Site Type selections include:

- Federal Correctional Facility
- Federally Qualified Health Center (FQHC)
- Federally Qualified Health Center Look-Alike (LAL)
- Indian Health Service Clinic
- Tribal Clinic
- Urban Indian Clinic
- Inpatient Facility/Hospital
- Other Facility (OFAC)
- Rural Health Clinic
- State Correctional Facility
- State/County Mental Hospital (Mental Health only)
- Unknown
- Veteran's Facility
- Youth Detention Center

**5. Ineligible Reason**

This field allows users to search for providers by one or multiple ineligible reasons. This field will be disabled if the user selected the "Eligible" status. Ineligible Reason selections include:

- CMS Deactivated
- PCO Omitted
- Not Geocoded
- Is Federal Provider
- Is NHSC Provider
- J1 Visa Waiver Holder
- No Discipline/Specialty
- New, Not Reviewed

**6. County FIP**

This field allows users to search for providers in one or multiple county FIPs in a particular state. This field can only be completed once a state or territory has been selected. When a "County FIP" is selected, the system will also populate the "County" drop-down with its corresponding value.

Search results will return providers that have been geocoded to the County FIP.


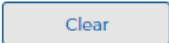
**7. CSD**

This field allows users to search for providers by one or multiple county subdivisions in their particular state. Users can begin entering the CSD and then choose from a filtered list.

Search results will return providers that have been geocoded to the CSD.





Feature	Description
8. Census Tract	<p>This field allows users to search for providers by one or multiple census tracts in their particular state. Users can begin entering the census tract and then choose from a filtered list.</p> <p>Search results will return providers that have been geocoded to the Census Tract.</p>
9. ZCTA Public ID	<p>This field allows users to search for providers in a ZCTA Public ID by its 5-digit numerical identifier. The 5 digit ZCTA must be preceded by the letter "Z." Only exact matches will be returned.</p> <p>Search results will return providers that have been geocoded to the ZCTA Public ID.</p>
10. NPI Change Type	<p>The field allows users to search for providers by the category of provider changes as reported by CMS. NPI Change Type selections include:</p> <ul style="list-style-type: none"> <li>• New Provider</li> <li>• CMS Deactivated</li> <li>• Taxonomy Change</li> <li>• NPI Address Change</li> </ul>
11. NPI Change Date	<p>This field allows users to search for providers by one or multiple dates. This field can only be completed once the "NPI Change Type" has been selected.</p>
12. License Number	<p>This field allows users to search for providers by their License Number.</p>
13. Last Updated By	<p>This field allows users to search for providers by one or multiple users who last updated the provider. If a state is selected, only those users who updated records in that state will be listed.</p>
14. Clinician Data Reviewed	<p>This field allows users to search for providers who have been attested to by a PCO. Status selections include:</p> <ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>
15.  (Search Button)	<p>When the desired fields are selected, users should click the Search button to initiate the search. At least one field must be selected before the Search button is enabled.</p>
16.  (Clear Button)	<p>Users may click this button to clear the fields used during a provider search. Selecting the "Clear" button on this page will also remove the search results from view.</p>

## USER NOTES

- Search fields are not case sensitive
- Users can "Select All" for all multi-select fields
- Some multi-select fields are responsive search fields. Users can begin typing in the search fields to narrow drop-down options





## 2.2.3 VIEWING SEARCH RESULTS

After entering all relevant search criteria, users can click “Search” to initiate the search. The search results will display a list of provider locations that meet the user-entered criteria.

The screenshot shows the 'Search Results' page. At the top right, there are three buttons: 'Customize Columns' (1), 'Generate Provider Import File' (2), and 'Download Results' (3). Below these, on the left, is a 'Show' dropdown set to '10' (4) and the text 'entries'. On the right, it says 'Showing 1 to 10 of 12507 entries' (5). The main area is a table with 10 columns: NPI, FIRST NAME, LAST NAME, DISCIPLINE, SPECIALTY, COUNTY NAME, COUNTY FIPS, CENSUS TRACT, CSD, and DIRECT TOUR HC. The table contains 10 rows of provider data. At the bottom, there is a pagination bar (6) and a set of navigation buttons including '<<', '<', '1', '2', '3', '4', '5', '>', and '>>' (7).

NPI	FIRST NAME	LAST NAME	DISCIPLINE	SPECIALTY	COUNTY NAME	COUNTY FIPS	CENSUS TRACT	CSD	DIRECT TOUR HC
1760772552	ISAAC	SPENCE	Primary Care	Certified Nurse Midwife	Montgomery	121	51121020201	5112193213	38
1528045523	KAZIMIERZ	SOWINSKI	Primary Care	Family Practice	Montgomery	121	51121020500	5112193313	33
1508857889	CAMILLA	TSUI	Primary Care	Family Practice	Montgomery	121	51121020201	5112193213	39
1700848363	CARL	HANNAH	Primary Care	Family Practice	Montgomery	121	51121021000	5112193013	39
1407997745	DONALD	HOLCOMB	Dental Health	Dentist	Lynchburg	680	51680000300	5168094403	34
1619238763	DANIEL	YEAGER	Dental Health	Dentist	Henrico	087	51087200112	5108796119	40
1548877194	VISHAKHA	DEVURUKHAR	Dental Health	Dentist	Darville	590	51590000800	5159091108	40
1043402910	SUMMER	SAWYER	Dental Health	Dentist	Lynchburg	680	51680001600	5168094403	32
1639225477	JEFFREY	RILEY	Dental Health	Dentist	Lynchburg	680	51680000202	5168094403	30
1558524561	EVAN	CHALK	Dental Health	Dentist	Lynchburg	680	51680001700	5168094403	28

Figure 17: Provider Search Results Table

### Feature

1. **(Customize Columns Button)**

### Description

This button allows users to add, remove, and reorder the columns visible in the search results table. For more information on customizing columns, see *Section 2.2.3A Customizing the Search Grid* for more detail.

2. **(Generate Provider Import File Button)**

This button allows users to generate provider import files and create a Provider Upload based on their search results. For more information on generating provider import files from the Advanced Search grid, see *Section 2.6.2B Generating Provider Import Files from the Advanced Search*.

3. **(Download Results Button)**

This button allows users to download the search results. This button will only be enabled if the search criterion includes the PCO's assigned state. For more information on downloading search results, see *Section 2.2.3B Downloading Provider Search Results* for more detail.




4. **(Customize Entries Drop Down)**

This drop-down allows users to customize the number of search results that appear per page. The system will default to showing ten search results per page. Once a new number is selected, the system will update the search results table. The custom entries selections include:

- 10
- 50





Feature	Description
	<ul style="list-style-type: none"><li>• 100</li><li>• 500</li></ul>
5.  (Showing X of X of X entries)	This field displays the total number of results returned and the subset of results being displayed.
6.  (Scroll Bar)	This scroll bar at the bottom of the search results table allows users to navigate horizontally across the search results to view columns.
7.  (Pagination)	This page selection allows users to navigate across search results pages 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.

Users can navigate from the Advanced Search to a Provider Profile by clicking on the hyperlinked NPI in the search results table. For more information about Provider Profiles and Locations, see *Section 2.3 Viewing Provider Profiles* and *2.4 Viewing Provider Location*.

### 2.2.3A CUSTOMIZING THE SEARCH GRID

In the Search Results table, users can add, remove, or reorder columns by clicking on the “Customize Columns” button. Customize column selections include:

- NPI
- First Name
- Middle Name
- Last Name
- Suffix
- Phone Number
- Fax Number
- Discipline
- Specialty
- Status
- Ineligible: CMS Deactivated
- Ineligible: PCO Omitted
- Ineligible: Not Geocoded
- Ineligible: Federal Provider
- Ineligible: NHSC Provider
- Ineligible: J1 Visa Waiver Holder
- Ineligible: No Specialty/Discipline
- Ineligible: New, Not Reviewed
- Address Line 1
- Address Line 2
- City
- State
- Postal Code
- Display Address
- County Name
- Latitude
- Longitude
- Match Level
- State FIPS
- County FIPS
- Census Tract
- CSD
- ZCTA Public ID
- Age
- Dental Auxiliaries
- Direct Tour Hours
- Reason Code
- Organizational NPI
- Designation/Organization Name
- Site Name
- Designation ID
- Organization Unique ID
- Designation Status
- Site Type
- Annual Medicaid Claims
- Medicaid Patient %





## Bureau of Health Workforce

### SDMS PCO Provider Management User Guide

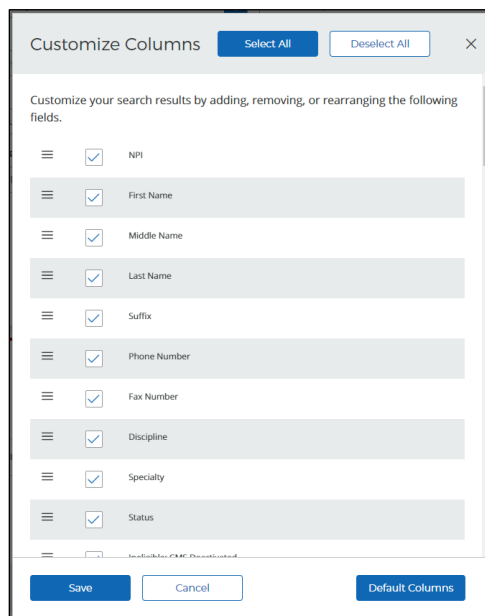
- Homeless %
- Migrant Farmworkers %
- American Indian/Alaska Native %
- Sliding Fee %
- Migrant Seasonal Farmworker %
- Intern or Resident?
- J1 Visa Waiver Holder?
- Federal Provider?
- NHSC Provider?
- Activation Date
- SDMS Last Modified Date
- SDMS Last Modified By
- NPI Address Change Date
- NPI Deactivation Date
- NPI Reactivation Date
- NPI New Provider Date
- NPI Taxonomy Change Date
- Taxonomy Code
- Taxonomy Type
- License Number
- License State
- Clinician Review Date



The screenshot shows a search results interface. At the top left, it says 'Search Results'. Below that, there's a 'Show' dropdown set to '10' and the text 'entries'. On the right side, there are three buttons: 'Customize Columns' (highlighted with a yellow box), 'Generate Provider Import File', and 'Download Results'. At the bottom right, it says 'Showing 1 to 10 of 12507 entries'.

Figure 18: Customize Columns in the Search Results Table

The following “Customize Columns” pop-up will display prompting users to customize their search results view:



The screenshot shows a 'Customize Columns' pop-up window. At the top, there are buttons for 'Select All', 'Deselect All', and a close button. Below the title, it says 'Customize your search results by adding, removing, or rearranging the following fields.' There is a list of fields with checkboxes next to them: NPI, First Name, Middle Name, Last Name, Suffix, Phone Number, Fax Number, Discipline, Specialty, and Status. All checkboxes are checked. At the bottom, there are buttons for 'Save', 'Cancel', and 'Default Columns'.

Figure 19: Customize Column Layout in Search Results Table

## INSTRUCTIONS





To add, remove, or reorder columns on the search results table:

1. Check (to add) or uncheck (to remove) column options
  - a. The columns that display in the default search results table will be checked. Uncheck these columns to remove them from the layout of the search results table
  - b. Additional columns can be added to the layout of the search results table by checking the checkbox
  - c. Click and drag the checked columns in the desired order to be displayed
  - d. Click Select All to select all the possible search results table columns
  - e. Click Deselect All to deselect all the possible search results table columns
2. Click the “Save” button to save changes and return to the updated search results table layout

## USER NOTES

- If the user selects Taxonomy Code, Taxonomy Type, License Number, and License State, 15 columns for each of these fields will be displayed to accommodate providers with multiple taxonomies and licenses
- At least one column must be selected for the “Save” button to be enabled
- Users can return to the default column selections by selecting the “Default Columns” button in the bottom right hand corner of the Customize Columns modal

## 2.2.3B DOWNLOADING PROVIDER SEARCH RESULTS

In the Search Results table, users can download results by clicking on the “Download Results” button. PCOs will only be able to download results if the search criterion includes the PCO’s assigned state. The downloaded Excel file will not be compatible with the Provider Import Tool. To download a macro-enabled Excel file to use for bulk updates from the search grid, see *Section 2.6.2B Generating Provider Import Files from the Advanced Search*.



Figure 20: Download Provider Location Records from Search Results Table

## INSTRUCTIONS

To download provider search results:

1. Select your state from the “State” search field
2. Apply any other desired filters using the search fields
3. Select the “Search” button to initiate the desired search
4. Select “Customize Columns” to add or remove columns on the search results grid
5. Click “Download Results.” A pop-up will appear notifying you that the required columns to upload the file back through the import tool will be included in your search grid results download (see *Figure 21: Download Results Pop-up*)
6. Click “Download” to continue
7. Results will download in a zipped file





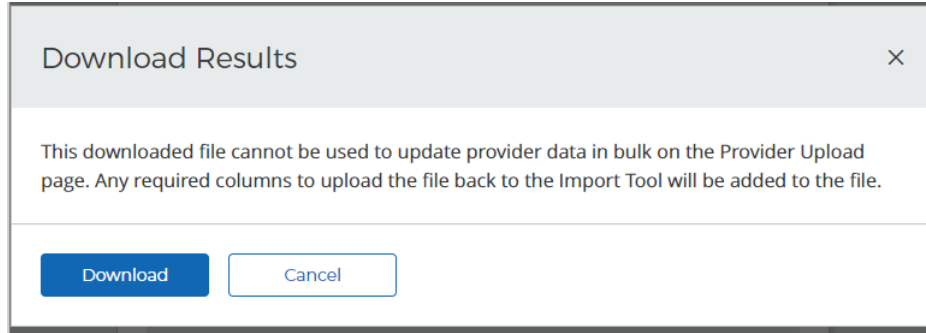


Figure 21: Download Results Pop-up

## USER NOTES

- Users can download up to 20,000 results per file. If the file would include more than 20,000 records, an error message will display prompting users to narrow the search criteria. For larger downloads, users can download a report of all provider locations in their state from the Tools Tab.



Figure 22: System Error Message for Attempted Downloads Over 20,000 Search Results

## 2.2.4 EDITING PROVIDER LOCATIONS IN THE SEARCH RESULTS GRID

In the Search Results table, PCOs can edit provider locations and save updates directly in the table without having to navigate to the Provider Location page. PCOs will be able to edit provider locations in their assigned state or Foreign Country (state code ZZ).

Search Results										
Show 10 entries		Showing 1 to 10 of 12507 entries								
NPI	FIRST NAME	LAST NAME	DISCIPLINE	SPECIALTY	COUNTY NAME	COUNTY FIPS	CENSUS TRACT	CSD	DIRECT TOUR HOURS	SITE TYPE
176077252	ISAAC	SPENCE	Primary Care	Certified Nurse Midwife	Montgomery	121	51121020201	5112193213	38	08/C
1528045523	KAZIMIERZ	SOWINSKI	Primary Care	Family Practice	Montgomery	121	51121020500	5112193313	33	08/C
1508857889	CAMILLA	TSUI	Dental Health	Family Practice	Montgomery	121	51121020201	5112193213	39	08/C
1700848363	CARL	HANNAH	Primary Care	Family Practice	Montgomery	121	51121021000	5112193013	39	08/C
1407997745	DONALD	HOLCOMB	Dental Health	Dentist	Lynchburg	680	51680000300	5168094403	34	08/C
1619238763	DANIEL	YEAGER	Dental Health	Dentist	Henrico	087	51087200112	5108796119	40	08/C
1548877194	VISHAKHA	DEVIRUKHAR	Dental Health	Dentist	Danville	590	51590000800	5159091108	40	08/C
1043402910	SUMMER	SAWYER	Dental Health	Dentist	Lynchburg	680	51680001600	5168094403	32	08/C
1639225477	JEFFREY	RILEY	Dental Health	Dentist	Lynchburg	680	51680000202	5168094403	30	08/C
1558524561	EVAN	CHALK	Dental Health	Dentist	Lynchburg	680	51680001700	5168094403	28	08/C

Figure 23: Editing Fields in the Search Results Table





## INSTRUCTIONS

To edit provider locations directly in the search results table:

1. Click on the cell you want to edit. Be sure you are on the row of the correct provider location
2. Make edits to the fields that are editable. For more information about which fields can be edited, see *Appendix A – Editable Provider Data Fields*
3. Press “Enter” on the keyboard to save changes after editing each row of provider information or click out of the row

The text in the edited row will display in green while the system processes the update. If the system is unable to process the edit, the row text will change to red and an error banner will display.



Figure 24: Error Message When System is Unable to Process Edits Made in the Search Grid

Depending on the field, the edit format will vary. Read-only fields will not change if users click them. For more information on which fields use which editing format, see *Appendix A – Editable Provider Data Fields*.

### Edit Format

1. (Character Input)

2. (Drop Down)

3. (Numerical with Input Stepper)

### Description

Fields that accept character inputs will highlight when the PCO clicks on the cell and will switch to an editable format. PCOs can type their edits directly into the cell.

Fields that accept pre-defined selections will display a drop-down menu when the PCO clicks on the cell. PCOs can double-click in the cell to display the drop-down, then select the desired option from the drop-down menu.

Fields that accept numerical inputs will have an up/down arrow option to scroll to the desired numerical value. PCOs can also type the number directly into the cell.

## USER NOTES

- If you click on a cell in another row or click outside of the row you are editing, the system will save your changes. If you want to cancel any changes you’ve made, you must change the data back.
- PCOs will not be able to edit providers that have been deactivated by CMS. All data will remain read only.
- PCOs will not be able to edit provider locations that are outside their assigned state. All data will remain ready only.





## 2.3 VIEWING PROVIDER PROFILES

In the Search Results table, PCOs can click on the hyperlinked NPI number of a provider to navigate from the Advanced Search to the Provider Profile. Users' last search will be saved when navigating between the Provider Search and provider profiles and locations.

Provider Profiles display read-only information about the provider. This information is reported to CMS and imported by SDMS as read-only on a weekly basis. Updates to this data can only be made through the CMS NPPES NPI registry.

**1** KRISTIE MITCHELL (NPI: 1326026162)

**2** KRISTIE MITCHELL

**3** Last updated by System - Needs Review on 09/22/2023 at 4:00 AM

**4** Revision History: Current

**Provider Information**

National Provider Identifier (NPI)	First Name	Middle Name
1326026162	KRISTIE	Not Available
Last Name	Suffix	Age
MITCHELL	Not Available	Not Available
Phone Number (703) 490-8400	Fax Number	Not Available
	Not Available	

**NPI Addresses**

NPI Primary Address  
14139 POTOMAC MILLS RD, KAISER PERMANENTE WOODBRIDGE MEDICAL CENTER, WOODBRIDGE, VA 22192-4644

NPI Secondary Addresses  
There are no NPI secondary addresses for this provider.

**Locations**

STATUS [v]	LOCATION ID [v]	ADDRESS [v]	DISPLAY ADDRESS [v]	DISCIPLINE [v]	SPECIALTY [v]	DIRECT TOUR HOURS [v]	
Eligible	443329	14139 Potomac Mills Rd, Woodbridge, VA 22192-4644	Standardized	Mental Health	Psychiatrist	24	Copy Location
Eligible	4374056	1201 Hospital Dr, Fredericksburg, VA 22401-8428	Standardized	Mental Health	Psychiatrist	16	Copy Location

Figure 25: Provider Profile

### Feature

#### 1. First Name Last Name (NPI)

### Description

This page title displays the name and NPI of the provider.

#### 2. Left Navigation

This left navigation allows users to navigate between the Provider Profile and Location pages.

#### 3. Last Updated By Banner

This banner displays the last date and time the provider data was updated by a user or the system (e.g., CMS NPPES NPI delta file import). The format for display is: MM/DD/YYYY HH:MM AM/PM (12-hour time). The last updated date and time will be captured after the user makes an update through the search grid, location page, or import tool. For more information on when last updated times and dates are changed, see *Appendix B – Changes to Last Updated By*.

#### 4. (Revision History Drop Down)

Revision History:

Current

This drop-down allows users to view previous versions of the provider profile and locations. For more information about viewing previous versions of a provider see, *Section 2.3.7 Viewing Revision History*.





Provider Profiles contain the following sections:

- Provider Information
- NPI Addresses
- Locations
- Taxonomies
- Change History
- Comments

### 2.3.1 VIEWING PROVIDER INFORMATION

The Provider Information section displays demographic information about the provider. This information is reported to CMS and imported by SDMS as read-only on a weekly basis. Updates to this data can only be made through the CMS NPES NPI registry.

Provider Information		
1	National Provider Identifier (NPI)	1558630251
2	First Name	MAHENDRA
3	Middle Name	D
4	Last Name	MAVALLI
5	Suffix	Not Available
6	Age	46
7	Phone Number	(817) 581-2100
8	Fax Number	Not Available

Figure 26: Provider Profile - Provider Information Section

Feature	Description
<b>1. National Provider Identifier (NPI)</b>	This field displays the NPI of the provider. NPIs are unique 10-digit numerical identifiers assigned to providers by the Center for Medicare and Medicaid Services.
<b>2. First Name</b>	This field displays the first name of the provider.
<b>3. Middle Name</b>	This field displays the middle name of the provider. If the provider did not enter a middle name, "Not Available" will display.
<b>4. Last Name</b>	This field displays the last name of the provider.
<b>5. Suffix</b>	This field displays the suffix of the provider. If the provider did not enter a suffix, "Not Available" will display.
<b>6. Age</b>	This field displays the age of the provider. Age is only considered for calculating FTEs for Dental Health providers. If the provider does not have a location with a Dental Health discipline, "Not Available" will display.





Feature	Description
<b>7. Phone</b>	This field displays the primary phone number for the provider. If CMS does not have a phone number on record for the provider, "Not Available" will display.
<b>8. Fax</b>	This field displays the primary fax number for the provider. If CMS does not have a fax number on record for the provider, "Not Available" will display.

### 2.3.2 VIEWING NPI ADDRESSES

The NPI Addresses section displays the provider's NPI Primary and Secondary Addresses. This information is reported to CMS and imported by SDMS as read-only on a weekly basis. Updates to a provider's NPI Primary or Secondary Addresses can only be made through the CMS NPES NPI registry.

Other location addresses for a provider can be added to the provider by a PCO. For more information on adding new provider locations, see *Section 2.5.1 Adding Provider Locations*.

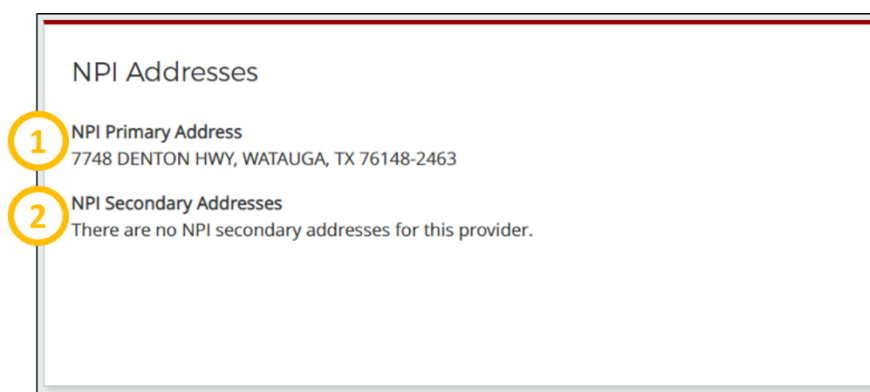


Figure 27: Provider Profile - NPI Addresses Section

Feature	Description
<b>1. NPI Primary Address</b>	<p>This field displays the provider's primary practice address.</p> <p>When a new provider is added to SDMS, the system automatically creates a provider location for the NPI Primary Address. The new location record will be created Ineligible as "New, Not Reviewed". If the NPI Primary Address of an existing provider record is changed, a new provider location record will be created and marked Ineligible as "New, Not Reviewed".</p>
<b>2. NPI Secondary Address</b>	<p>This field displays the provider's secondary practice addresses. If the provider did not report additional practice addresses to CMS, "There are no NPI Secondary Addresses for this provider" will display.</p> <p>The system will not automatically create a provider location for these secondary addresses. If these addresses require a location to be created by a PCO, see <i>Section 2.5.1 Adding Provider Locations</i>.</p>

### 2.3.3 VIEWING LOCATIONS



The Locations section displays a table of all locations associated with the provider and summary information about those locations. Users can navigate to the respective provider locations to view additional details. For information on the data available on provider locations, see *Section 2.4 Viewing Provider Locations*.

1	2	3	4	5	6	7	8	9
Add New Location	STATUS	LOCATION ID	ADDRESS	DISPLAY ADDRESS	DISCIPLINE	SPECIALTY	DIRECT TOUR HOURS	Copy Location
	Eligible	443329	14139 Potomac Mills Rd, Woodbridge, VA 22192-4644	Standardized	Mental Health	Psychiatrist	24	Copy Location
	Eligible	4374056	1201 Hospital Dr, Fredericksburg, VA 22401-8428	Standardized	Mental Health	Psychiatrist	16	Copy Location

Figure 28: Provider Profile - Locations Section

### Feature

1. **Add New Location**  
(Add New Location Button)

### Description

This button allows PCOs to add a new location for a provider. For more information about adding a new location, see *Section 2.5.1 Adding Provider Locations*.

2. **Status**

This field displays the Status of the provider location.

3. **Location Status**

This field displays the system generated Provider Location ID for each location.

4. **Address**

This field displays the Address of the provider location.

5. **Display Address**

This field indicates which address is being displayed in the Provider Management Portal. Display Address options include:

- Physical
- Standardized

6. **Discipline**

This field displays the Discipline of the provider location.

7. **Specialty**

This field displays the Specialty of the provider location.

8. **Direct Tour Hours**

This field displays the Direct Tour Hours of the provider location.

9. **Copy Location**  
(Copy Address Button)

This button allows PCOs to copy an existing provider location. For more information about copying an existing location, see *Section 2.5.1A Copying Provider Locations*.

## 2.3.4 VIEWING TAXONOMIES

The Taxonomies section displays information about a provider's specializations and license information. This information is reported to CMS and imported by SDMS as read-only on a weekly basis. Updates to a provider's taxonomy can only be made through the CMS NPPES NPI registry.





This section will display up to 15 taxonomies and licenses for a provider.

1 PRIMARY TAXONOMY ▾	2 TAXONOMY CODE ▾	3 TAXONOMY TYPE ▾	4 LICENSE NUMBER ▾	5 LICENSE STATE ▾
✓	207R00000X	Allopathic & Osteopathic Physicians	0101053028	Virginia

Figure 29: Provider Profile - Taxonomies Section

## Feature

### 1. Primary Taxonomy

## Description

This field displays the primary taxonomy for the provider identified by a ✓. A provider may have one or more taxonomies, but they can have only one primary taxonomy.

If there is an identified primary taxonomy and it is active, the system will automatically populate the “Discipline” and “Specialty” fields on the provider location page with the corresponding “Discipline” and “Specialty.” If there is no primary taxonomy identified, the “Discipline” and “Specialty” fields will not be populated by the system, resulting in an “Ineligible” status of “No Discipline / Specialty.”

If the weekly CMS NPPES NPI Delta File updates the taxonomy information for a provider, the system will not automatically update the “Discipline” and “Specialty” fields on provider locations.

PCOs can override the NPI-determined “Discipline” and “Specialty” by entering a new discipline or specialty that may or may not match the taxonomy code and taxonomy type. For more information about editing “Discipline” and “Specialty,” see *Section 2.5.2 Updating Provider Locations*.

### 2. Taxonomy Code

This field displays the provider’s associated Taxonomy Code. This information is based on the CMS-defined specialty of practice. A list of active taxonomies can be found in the *Manual for Policies and Procedures*.

### 3. Taxonomy Type

This field displays the provider’s associated Taxonomy Type as determined by the “Taxonomy Code.” For more information on how taxonomy types are determined, see the *Manual for Policies and Procedures*.

### 4. License Number

This field displays the provider’s license number. A provider must have at least one license number for each state in which they practice and may have more than one license number per state if they have more than one specialization. A provider may have two of the same taxonomy codes with two different license numbers and states if they are providing the same service in two different geographic locations.

### 5. License State

This field displays the state in which the provider is providing services for the taxonomy type/code.

## 2.3.5 VIEWING CHANGE HISTORY





The Change History section displays a historical record of updates to provider information reported to CMS. Updates to provider information through the CMS NPPES NPI registry are imported by SDMS as read-only on a weekly basis. The change history section does not capture any updates made by PCOs.

The change history section captures the following types of changes:

- New Providers
- NPI Taxonomy Changes
- NPI Address Changes
- NPI Provider Deactivations
- NPI Provider Reactivations

Change History			
Showing 1 to 2 of 2 entries			
1 DATE ▾	2 CHANGE ▴	3 FROM ▴	4 TO ▴
11/25/2020 12:56:35 PM	NPI_ADDRESS_CHANGE	7748 DENTON HWY, WATAUGA, TEXAS, 761482463	7748 DENTON HWY, WATAUGA, TEXAS, 761482463
09/22/2014 09:46:00 PM	NEW_PROVIDER	NULL	MAVALLI, MAHENDRA (1558630251)

Figure 30: Provider Profile - Change History Section

## Feature

### 1. Date

## Description

This field displays the date and time the provider was updated.

### 2. Change

This field identifies the type of change imported. NPI Change Types include:

- New Providers
- NPI Taxonomy Changes
- NPI Address Changes
- NPI Provider Deactivations
- NPI Provider Reactivations

### 3. From

This field displays the original data before the CMS update. The purpose of this field is to aid users in determining what changes have been made.

### 4. To

This field displays the new data after the CMS update. Users can compare this data to the "From" column to determine what changes have been made.

## 2.3.6 ADDING AND VIEWING COMMENTS

The Comments section allows PCOs to publish comments to the Provider Profile to communicate important information with other users. Comments will display with the PCO commenter, the date and time the comment was published, and the comment text. Comments cannot be deleted once the "Publish Comment" button has been clicked, and all system users can view published comments regardless of their assigned state or user role.





Comments

Publish Comment

1 test comment 3  
2 texas@example.com 01/08/2021 11:28:15 AM

Figure 31: Provider Profile - Comments Section

Feature	Description
1. Comment	This field displays published comments. If there are no comments, “There are no comments for this provider” will display.
2. User	This field displays the email of the PCO who published the comment.
3. Date	This field displays the date and time the comment was published.

## INSTRUCTIONS

To add a comment to a provider profile:

1. Enter comment in the text box
2. Select “Publish Comment”

A success message will display if the comment is saved by the system.



Figure 32: Success Banner after Entering a Comment

### 2.3.7 VIEWING REVISION HISTORY

Users can view previous versions of provider profiles and locations using the Revision History dropdown at the top of a provider profile. Previous versions of the provider can be viewed by selecting a timestamp from the dropdown. Users can see up to ten previous versions of the provider profiles and locations. The Revision History drop down will default to Current, the most up to date version of the provider profile and location.





## Bureau of Health Workforce

### SDMS PCO Provider Management User Guide

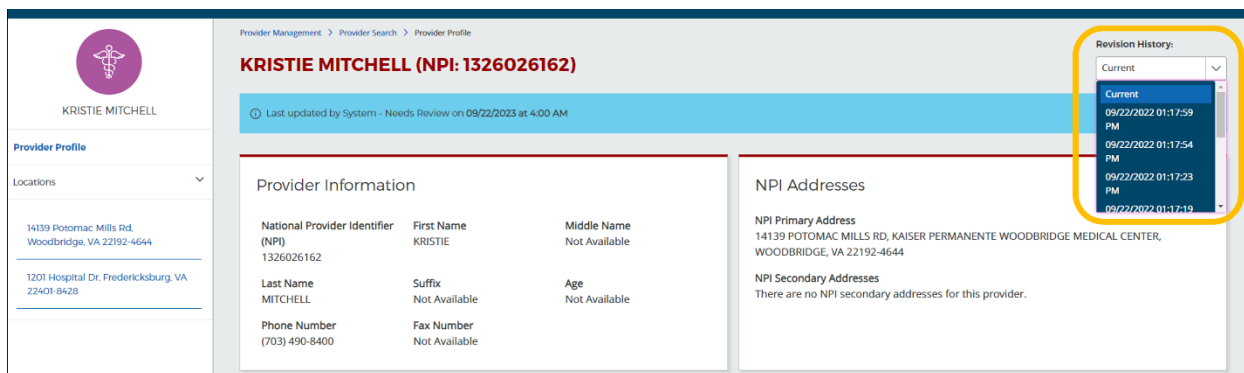


Figure 33: Revision History Drop Down on Provider Profiles

## INSTRUCTIONS

To view previous versions of provider profiles and locations:

1. Navigate to a provider profile
2. Select an option from the Revision History drop down
3. The previous version of a provider profile and locations will display. A gray banner will appear on the top of the page notifying users they are viewing a previous revision and not real-time provider data

To return to the current version of the provider profile, users can navigate back to the provider profile and select 'Current' from the Revision History drop down.

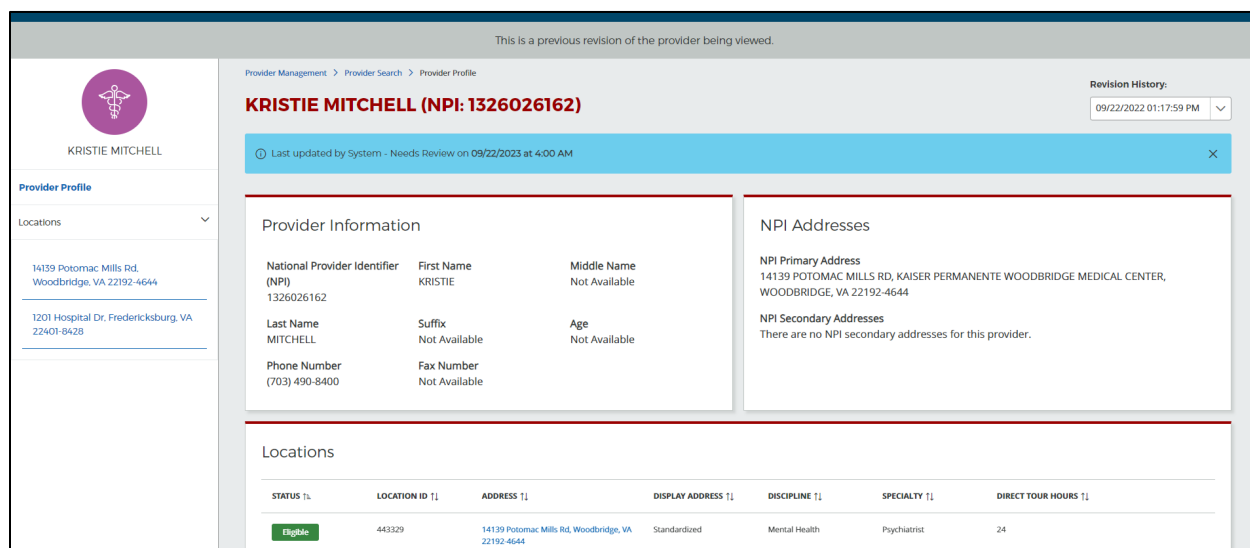


Figure 34: Viewing a Previous Revision of a Provider Profile

## USER NOTES

- When viewing previous versions, PCOs will not be able to add new locations, copy existing locations, or make any updates, including attestation, to provider locations.

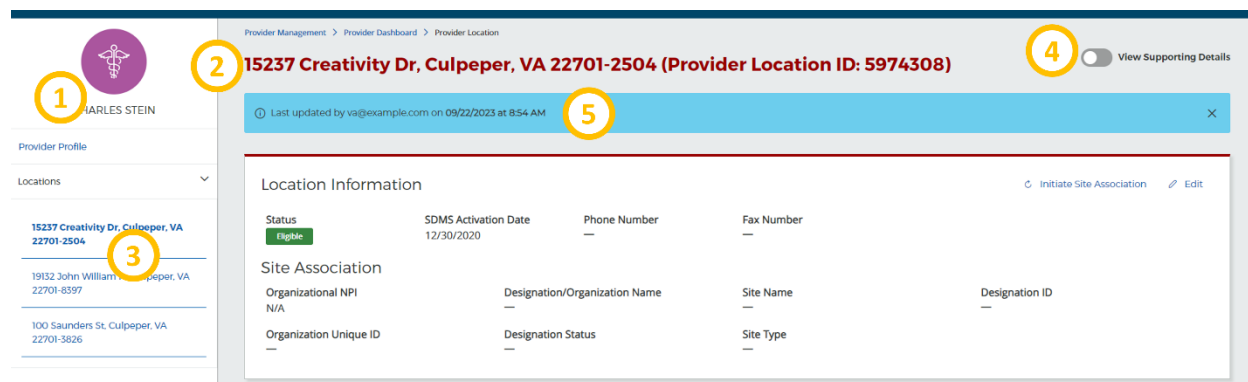




## 2.4 VIEWING PROVIDER LOCATIONS

Users can click on the hyperlinked Address from the left navigation or Location section to navigate from the Provider Profile to the Provider Location.

Provider Locations display additional information about the provider and the care provided at each unique practice location. This information is editable by PCOs for locations in their assigned state or with a state code of Foreign County (ZZ). For information on editing provider locations, see *Section 2.5 Editing Provider Locations*.



**Figure 35: Provider Location**

### Feature

#### 1. First Name Last Name

### Description

This field displays the name of the provider.

#### 2. Location Address and Provider Location ID

This title displays the address of the provider location and the system-generated Provider Location ID being viewed.

#### 3. Left Navigation

This left navigation allows users to navigate between the Provider Profile and Location pages.

#### 4. (View Supporting Details Toggle)

This toggle allows users to view additional supporting details for each editable field on the location. For more information on viewing supporting details, see *Section 2.4.9 Viewing Supporting Details*.

#### 5. Last Updated By Banner

This banner displays the last date and time the provider data was updated by a user or the system (e.g., CMS NPEES NPI delta file import). The format for display is: MM/DD/YYYY HH:MM AM/PM (12-hour time). The last updated date and time will be captured after the user makes an update through the search grid, location page, or import tool. For more information on when last updated times and dates are changed, see *Appendix B – Changes to Last Updated By*.





Provider Locations consist of the following sections:

- Location Information
- Needs Review
- Full Time Equivalent (FTE) Calculations
- Clinical Information and Populations Served Data
- Employment Status
- NHSC Program Information
- Designations
- Location Address and Geocoded Results
- Attestation

### 2.4.1 VIEWING LOCATION INFORMATION

The Location Information section displays the eligibility status and other general information about the provider location. From this section, users can also view additional data points related to the healthcare delivery site associated with the provider location.

Location Information						<a href="#">Initiate Site Association</a>	<a href="#">Edit</a>				
1	Status	2	Ineligible Reason(s)	3	PCO Omitted?	4	SDMS Activation Date	5	Phone Number	6	Fax Number
	Ineligible		PCO Omitted		Relocated		05/02/2022		—		—
Site Association											
7	Organizational NPI	8	Designation/Organization Name	9	Site Name	10	Designation ID				
	N/A		—		—		—				
11	Organization Unique ID	12	Designation Status	13	Site Type						
	—		—		—						

Figure 36: Provider Location - Location Information Section

#### Feature

##### 1. Location Status

#### Description

This field displays the Status of the provider location. Statuses include:

- Eligible
- Ineligible

If a provider location is eligible, that provider location may be counted or otherwise used in the designation application process and/or HPSA update for that state. If a provider location is ineligible, that provider location will not be counted or otherwise used in the designation process and/or HPSA update for that state.

##### 2. Ineligible Reason

This field displays if the location has an ineligible status. If the location is ineligible, this field shows the reason(s) it is ineligible. Ineligible Reasons include:

- CMS Deactivated
- PCO Omitted
- Not Geocoded





## Feature

## Description

- Is Federal Provider
- J1 Visa Waiver Holder
- Is NHSC Employee
- No Discipline / Specialty
- New, Not Reviewed

For more information about ineligible reasons, see *Appendix C – Ineligible Reasons and PCO Omitted Reasons*.

### 3. PCO Omitted Reason

This field displays if the location is ineligible with an ineligible reason of “PCO Omitted”. If the location has been omitted by a PCO, this field will display the selected reason code. This field will only display if the location has an ineligible status. PCO Omitted Reasons include:

- Admin Only
- Core Mental Health
- Deceased
- Duplicate Entry
- Faculty
- Incorrect Profession
- Inpatient Facility Only
- License Suspended by State / In Disciplinary Status by State
- Locum Tenens / PRN
- Military Address
- Non-Fed Not Licensed in State
- Not a Service Delivery Site
- Not in Clinical Practices
- Not Public Access Facility
- Open-ended Long Term Leave
- Relocated
- Retired
- Specialist / Subspecialist
- Urgent Care Clinic

For more information about PCO Omitted reasons, see *Appendix C – Ineligible Reasons and PCO Omitted Reasons*.

### 4. SDMS Activation Date

This field displays the date the provider location was activated. If the location was added by a PCO using the “Add New Location” button or the Import Tool, the SDMS Activation Date is populated with the date the location was created. If the location was added by the system through the weekly CMS NPPES NPI Delta File, the SDMS Activation Date is populated when the “New, Not Reviewed” ineligible reason is removed by the PCO.

### 5. Phone

This field displays the user-entered phone number for the provider location. If no information has been entered for this field, a “—” will display.





Feature	Description
6. Fax	This field displays the user-entered fax number for the provider location. If no information has been entered for this field, a “—” will display.
7. Organizational NPI	This field displays the user-entered Organizational NPI for the provider location. Organizational NPIs are unique 10-digit numerical identifiers assigned to providers by the Center for Medicare and Medicaid Services if they bill at the organization level. If no information is available for this field, “N/A” will display.
8. Designation/Organization Name	This field displays the Designation/Organization Name for the healthcare delivery site associated to the provider location. If the provider location is associated to a Facility Designation, this field will display the Designation Name. If the provider location is associated to an Auto-HPSA, this field will display the Organization Name. If no information has been entered for this field, a “—” will display.
9. Site Name	This field displays the Site Name for the healthcare delivery site associated to the provider location. This field will only be populated if the healthcare delivery site is an Auto-HPSA. If no information has been entered for this field, a “—” will display.
10. Designation ID	This field displays the Designation ID for the healthcare delivery site associated to the provider location. If no information has been entered for this field, a “—” will display.
11. Organization Unique ID	This field displays the Organization Unique ID for the healthcare delivery site associated to the provider location. This field will only be populated if the healthcare delivery site is an Auto-HPSA. If no information has been entered for this field, a “—” will display.
12. Designation Status	This field displays the Designation Status for the healthcare delivery site associated to the provider location. If no information has been entered for this field, a “—” will display.
13. Site Type	<p>This field displays the site type for the provider location. Site Types options include:</p> <ul style="list-style-type: none"><li>• Federal Correctional Facility</li><li>• Federally Qualified Health Center (FQHC)</li><li>• Federally Qualified Health Center Look-Alike (LAL)</li><li>• Indian Health Service Clinic</li><li>• Tribal Clinic</li><li>• Urban Indian Clinic</li><li>• Inpatient Facility/Hospital</li><li>• Other Facility (OFAC)</li><li>• Rural Health Clinic</li><li>• State Correctional Facility</li><li>• State/County Mental Hospital (Mental Health only)</li><li>• Unknown</li></ul>





## Feature

## Description

- Veteran’s Facility
- Youth Detention Center

Provider locations that have “Federal Correctional Facility,” “State Correctional Facility,” or “State/County Mental Hospital” as their Site Type will not be usable for Geographic or Population HPSA designations. PCOs will still be able to add these providers to Correctional Facility and State/County Mental Hospital Facility HPSA applications.

### 2.4.2 VIEWING NEEDS REVIEW FLAGS

The Needs Review section displays Needs Review flags indicating if there are one or more reasons a provider location requires PCO review or action to be taken. This section will only appear if a Needs Review flag is present on the provider location.

Figure 37: Provider Location - Needs Review Section

PCOs will be able to see flags on all provider locations within SDMS but can only take action on provider locations in their state. For more information on addressing Needs Review flags, see *Section 2.5.5 Addressing Needs Review Flags*.

### 2.4.3 VIEWING FTE CALCULATIONS

The Full Time Equivalent (FTE) Calculations section displays the FTE values calculated based on the number of direct tours or percent of time spent serving each population at this provider location. The calculations are dynamic, with values updating after PCOs edit and save changes for fields that impact FTE calculations. All FTE values displayed in this section are read-only. For more information on how FTE values are calculated and the fields used, see the *Manual for Policies and Procedures*.





Full Time Equivalent (FTE) Calculations			
The table below displays the FTE values calculated based on the number of direct tour hours or percent of time spent serving each population at this location.			
Geographic Area	1	Low Income Migrant Seasonal Worker Population	0
Geographic Area High Needs	1	Low Income Migrant Seasonal Worker Homeless Population	0
Medicaid Eligible Population	0	Homeless Population	0
American Indian/Alaska Native Population	0	Migrant Farmworker Population	0
Low Income Population	0	Migrant Seasonal Farmworker Population	0
Low Income Homeless Population	0	Migrant Farmworker Homeless Population	0
Low Income Migrant Farmworker Population	0	Migrant Seasonal Worker and Homeless Population	0
Low Income Homeless Migrant Farmworker Population	0		

**Figure 38: Provider Location - FTE Calculations Section**

Provider Locations with the Obstetrics and Gynecology or Certified Nurse Midwife Specialty will show FTE Calculations for both Primary Care HPSAs and Maternity Care Target Areas.

Full Time Equivalent (FTE) Calculations					
The table below displays the FTE values calculated based on the number of direct tour hours or percent of time spent serving each population at this location.					
POPULATION TYPE	PRIMARY CARE FTE	MCTA FTE	POPULATION TYPE	PRIMARY CARE FTE	MCTA FTE
Geographic Area	1	1	Low Income Migrant Seasonal Worker Population	0	0
Geographic Area High Needs	1	1	Low Income Migrant Seasonal Worker Homeless Population	0	0
Medicaid Eligible Population	0	0	Homeless Population	0	0
American Indian/Alaska Native Population	0	0	Migrant Farmworker Population	0	0
Low Income Population	0	0	Migrant Seasonal Farmworker Population	0	0
Low Income Homeless Population	0	0	Migrant Farmworker Homeless Population	0	0
Low Income Migrant Farmworker Population	0	0	Migrant Seasonal Worker and Homeless Population	0	0
Low Income Homeless Migrant Farmworker Population	0	0			

**Figure 39: Provider Location - FTE Calculations Table for OBGYNs and CNMs**

## 2.4.4 VIEWING CLINICAL INFORMATION AND POPULATIONS SERVED DATA

The Clinical Information and Populations Served Data section displays information about the services provided and the special populations served at this location.

Updates made to the fields in the Clinical Information section will impact a provider's FTE. For more information on how clinical information and population served data affect FTE calculations, see the *Manual for Policies and Procedures*.





Clinical Information	
1 Discipline Dental Health	2 Specialty Dentist
3 Dental Auxiliaries —	4 Direct Tour Hours 40
Populations Served Data	
5 Annual Medicaid Claims 0	6 Medicaid Patient % 0%
7 Sliding Fee Scale % 0%	8 American Indian/Alaska Native % 0%
9 Homeless % 0%	10 Migrant Farmworker % 0%
11 Migrant Seasonal Farmworker % 0%	

Figure 40: Provider Location - Clinical Information Section

## Feature

### 1. Discipline

## Description

This field displays the discipline of the provider associated with the provider location. Discipline options include:

- Primary Care
- Mental Health
- Dental Health

The assigned discipline will determine if additional fields are displayed on the location record:

- If Dental Health discipline, Dental Auxiliaries field will appear in the Clinical Information section
- If Mental Health discipline, State/County Mental Hospital selection will appear as an option in the Site Type section

The system will automatically populate Discipline and Specialty for new location records if the provider has a primary taxonomy that is active. For more information about how Disciplines and Specialties are mapped to different taxonomies, see the *Manual for Policies and Procedures*.

If there is no eligible primary taxonomy, the system will populate the Discipline and Specialty based on the default provider location.





**Feature****Description****2. Specialty**

This field displays the specialty of the provider associated with the provider location. The assigned discipline will determine which specialty options are available for the location. Specialty options include:

- If Primary Care discipline:
  - Certified Nurse Midwife
  - Family Practice
  - General Practitioner
  - Internal Medicine
  - Obstetrics and Gynecology
  - Pediatrics
- If Mental Health discipline:
  - Psychiatrist
  - Clinical Psychologist
  - Clinical Social Worker
  - Psychiatric Nurse Specialist
  - Marriage and Family
- If Dental Health discipline:
  - Dentist

**3. Direct Tour Hours**

This field displays the amount of time the provider spends providing care at the location. When a new location is created, the Direct Tour Hours will automatically default to 40 hours, and Geographic HPSA will be 1 in the FTE Calculations.

**4. Dental Auxiliaries**

This field displays the number of Dental Auxiliary staff for the provider location. This field only displays for provider locations with a Dental Health discipline. Dental Auxiliaries options include:

- Unknown
- 0
- 1
- 2
- 3
- 4 or more

The “Auxiliary Weight” when calculating the FTE for a Dental Health provider is determined by the Dentist’s Age and Auxiliary Number entered. The system will not count dental auxiliaries when calculating FTEs based on Medicaid claims. For more information on how dental auxiliaries affect provider FTEs, see the *Manual for Policies and Procedures*.

**5. Annual Medicaid Claims**

This field displays the number of Medicaid Claims made by the provider at this location.

**6. Medicaid Patient %**

This field displays the percentage of time the provider serves Medicaid patients at this location.

**7. Sliding Fee Scale %**

This field displays the percentage of time the provider serves Sliding Fee Scale patients at this location.





Feature	Description
<b>8. American Indian/Alaska Native %</b>	This field displays the percentage of time the provider serves American Indian/Alaska Native patients at this location.
<b>9. Homeless %</b>	This field displays the percentage of time the provider serves Homeless patients at this location.
<b>10. Migrant Farmworker %</b>	This field displays the percentage of time the provider serves Migrant Farmworker patients at this location.
<b>11. Migrant Seasonal Farmworker %</b>	This field displays the percentage of time the provider serves Migrant Seasonal Farmworker patients at this location.

## 2.4.5 VIEWING EMPLOYMENT STATUS

The Employment Status section displays information about the provider that may impact a provider's eligibility status and FTE calculations.

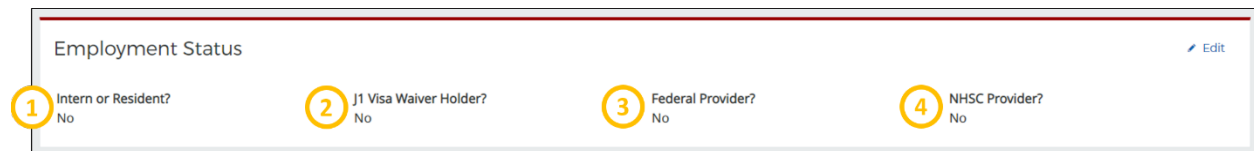


Figure 41: Provider Location - Employment Status Section

Employment Status	Description
<b>1. Intern or Resident?</b>	This field displays an indicator if the provider is an Intern or Resident at the provider location. Intern or Resident? options include: <ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul>
<b>2. J1 Visa Waiver Holder?</b>	This field displays an indicator if the provider is a J1 Visa Waiver Holder at the provider location. J1 Visa Waiver Holder? options include: <ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul>
<b>3. Federal Provider?</b>	This field displays an indicator if the provider is Federal Provider at the provider location. Federal Provider? options include: <ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul>
<b>4. NHSC Provider?</b>	This field displays an indicator if the provider if a NHSC Provider at the provider location. NHSC Provider? options include: <ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul>

If the provider is an active NHSC participant, all provider locations for the provider will automatically be marked as Ineligible with an ineligible reason of "Is NHSC Employee." The system will indicate if the provider is a NHSC Provider based on data sourced from BMISS and will display as read-only.





## 2.4.5A VIEWING NHSC PROGRAM INFORMATION

The NHSC Program Information section displays details about the NHSC program status of a provider that could impact a provider's eligibility status. This section will only appear if a provider has been enrolled in an NHSC program. The data displayed is imported from BMISS and is read-only.

Figure 42: Provider Location - NHSC Program Information Section

Feature	Description
<b>1. Program Name</b>	This field displays the name of the NHSC program the provider is enrolled in.
<b>2. Program Status</b>	This field displays if the providers is an active NHSC participant. All locations for an active NHSC participant will be considered Ineligible with an ineligible reason of "Is NHSC Employee"
<b>3. Contract Type</b>	This field displays the type of NHSC contract the provider is enrolled in. Contract types include: <ul style="list-style-type: none"> <li>• Full Time</li> <li>• Part Time</li> </ul>
<b>4. Contract Start Date</b>	This field displays the date the provider started their NHSC service.
<b>5. Contract End Date</b>	This field displays the date the provider finished their NHSC service.

## 2.4.6 VIEWING DESIGNATIONS

The Designations section displays any designations where the provider location was included in the Rational Service Area or chosen as the Nearest Source of Care. The designations listed in the tables could include Geographic and Population HPSAs, MUA/Ps, or AutoHPSAs.

Figure 43: Provider Location – Designations Section





Feature	Description
<b>1. Designation ID / Organization Unique ID</b>	This column will list the Designation ID for a Geo/Pop HPSA and MUA/P and the Organization Unique ID for an AutoHPSA. Selecting this link will take the user to the corresponding designation or organization profile.
<b>2. Designation Name</b>	This column will list the Designation Name for a Geo/Pop HPSA or an MUA/P and the Organization Name for an AutoHPSA.
<b>3. Designation Type</b>	This column will list the Designation Type. Options include: <ul style="list-style-type: none"><li>• Geographic HPSA</li><li>• Population HPSA</li><li>• MUA/P</li><li>• AutoHPSA</li></ul>
<b>4. Designation Option</b>	This column will list the Designation Option.
<b>5. Status</b>	This column will list the status of the designation and will update in real-time if the designation status changes.
<b>6. Save Date</b>	This column will list the date the RSA or the NSC was saved. Any changes to the provider data made after this date will not be reflected in the designation score or data.
<b>7. Designation Date</b>	This column will list when the Designation was approved by SDB and officially designated.
<b>8. Site Name</b>	This column will list the name of the AutoHPSA site where the provider location was listed as the Nearest Source of Care.

---

## 2.4.7 VIEWING LOCATION ADDRESS AND GEOCODED RESULTS

The Location Address and Geocoded Results section displays the provider location's address and geographical information returned by the HDW geocoding service.





Location Address

Edit

1

Physical Address

Address Line 1

1515 NORTH COURTHOUSE ROAD

Address Line 2

—

City

ARLINGTON

State

VA

Postal Code

22201

2

Standardized Address

Display Address

Address Line 1

1515 N Courthouse Rd

Address Line 2

—

City

Arlington

State

VA

Postal Code

22201-2909

3

Geocoded Results

4

Address Successfully Geocoded?

Yes

5

Match Level

01 - Address point

6

Latitude

38.8911425457

7

Longitude

-77.0838625902

8

County Name, FIPS

Arlington, 013

9

State, FIPS

VA, 51

10

CSD FIPS

5101390072

11

Census Tract

51013101701

12

ZCTA Public ID

Z22201

Map

Satellite

Figure 44: Provider Location - Location Address Section

## Feature

### 1. Physical Address

## Description

These fields display the physical address line information for the provider location.

If the location was added by a PCO using the “Add New Location” button or the Import Tool, these fields will display the user-entered address information. If the location was added by the system through the weekly CMS NPPES NPI Delta File, these fields will display the provider’s NPI Primary Address information.

### 2. Standardized Address

These fields display the standardized address for the provider location returned by the HDW geocoding service.

Standardized addresses will not display for locations that are manually geocoded (Match level = 0 – User Override) or that have not been geocoded.





Feature	Description
<b>3. <span>Display Address</span> (Display Address)</b>	<p>This tag shows the address that is used across the Provider Management Portal. The display address appears in the following places:</p> <ul style="list-style-type: none"><li>• Title of Provider Location</li><li>• Left Hand Navigation</li><li>• Location Summary Section on Provider Profiles</li><li>• Provider Search Results</li><li>• Provider Downloaded Reports</li></ul>
<b>4. Address Successfully Geocoded?</b>	<p>This field displays an indicator if the system has geocoded the provider location successfully. Address Successfully Geocoded? options include:</p> <ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul> <p>Provider locations that have not been geocoded successfully will be Ineligible with a reason of “Not Geocoded.”</p>
<b>5. Match Level</b>	<p>This field displays the confidence level with which this address has been geocoded by the HDW geocoding service. The location is considered successfully geocoded if it has a match level of 3 or lower. Match Levels include:</p> <ul style="list-style-type: none"><li>• 00 – User override</li><li>• 01 – Address point / Point Address</li><li>• 02 – Interpolated street address</li><li>• 03 – Zip code extended</li><li>• 04 – Street name / segment</li><li>• 05 – Zip code</li><li>• 06 – Place name</li><li>• 07 – State</li><li>• 99 – Ungeocoded</li></ul>
<b>6. Latitude</b>	<p>This field displays the latitude coordinate of the provider location. The Latitude will be prepopulated by the system based on the results of the HDW geocoding service.</p> <p>PCOs can override the system-generated latitude and longitude. For more information on how to regeocode a provider location, see <i>Section 2.5.2B Re-Geocoding Provider Locations</i>.</p>
<b>7. Longitude</b>	<p>This field displays the longitude coordinate of the provider location. The Longitude will be prepopulated by the system based on the results of the HDW geocoding service.</p> <p>PCOs can override the system-generated latitude and longitude. For more information on how to regeocode a provider location, see <i>Section 2.5.2B Re-Geocoding Provider Locations</i>.</p>





Feature	Description
<b>8. County Name, FIPS</b>	This field displays the County Name and FIPS of the provider location. This field will be prepopulated by the system based on the results of the HDW geocoding service.
<b>9. State, FIPS</b>	This field displays the State and FIPS of the provider location. This field will be prepopulated by the system based on the results of the HDW geocoding service.
<b>10. CSD FIPS</b>	This field displays the CSD FIPS of the provider location. This field will be prepopulated by the system based on the results of the HDW geocoding service.
<b>11. Census Tract</b>	This field displays the Census Tract of the provider location. This field will be prepopulated by the system based on the results of the HDW geocoding service.
<b>12. ZCTA Public ID</b>	This field displays the ZCTA Public ID of the provider location. This field will be prepopulated by the system based on the results of the HDW geocoding service.
<b>13. Address Map</b>	This map displays a visual representation of the provider location. This view is based on the results of the HDW geocoding service or PCO entered latitude and longitude. If a location has a match level of 99 or N/A, the address map will not display on the provider location.

#### USER NOTES

- Locations that are created by the CMS-NPPES Delta File or by the Provider Import File are geocoded on an hourly basis. Before they are picked up by the SDMS Batch Geocoding process, these locations will not have a Standardized Address, Match Level, or any other Geocoded Results. PCOs do not have to take any action for the system to geocode these locations.

#### 2.4.8 VIEWING CLINICIAN DATA ATTESTATION

This section displays details of the provider location's attestation status including when the location was last attested to and the PCO who completed attestation.

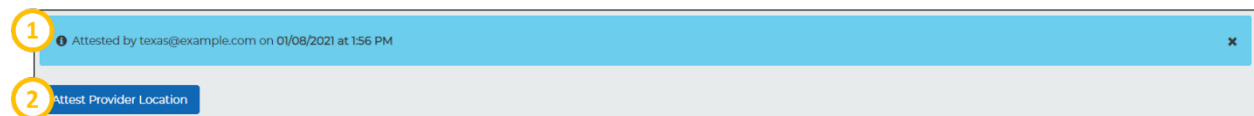


Figure 45: Provider Location - Attestation Banner





## Feature

### 1. Attestation Banner

## Description

This banner displays details of the last attestation. The banner will display the email of the PCO who last attested to the provider location and the date and time the attestation was completed. If the location was attested to using the Import Tool, the banner will display the email of the PCO who uploaded the import file and the date and time the bulk upload was processed by the system.

If the provider location has not been attested to, no banner will display.

### 2. (Attest Provider Location)

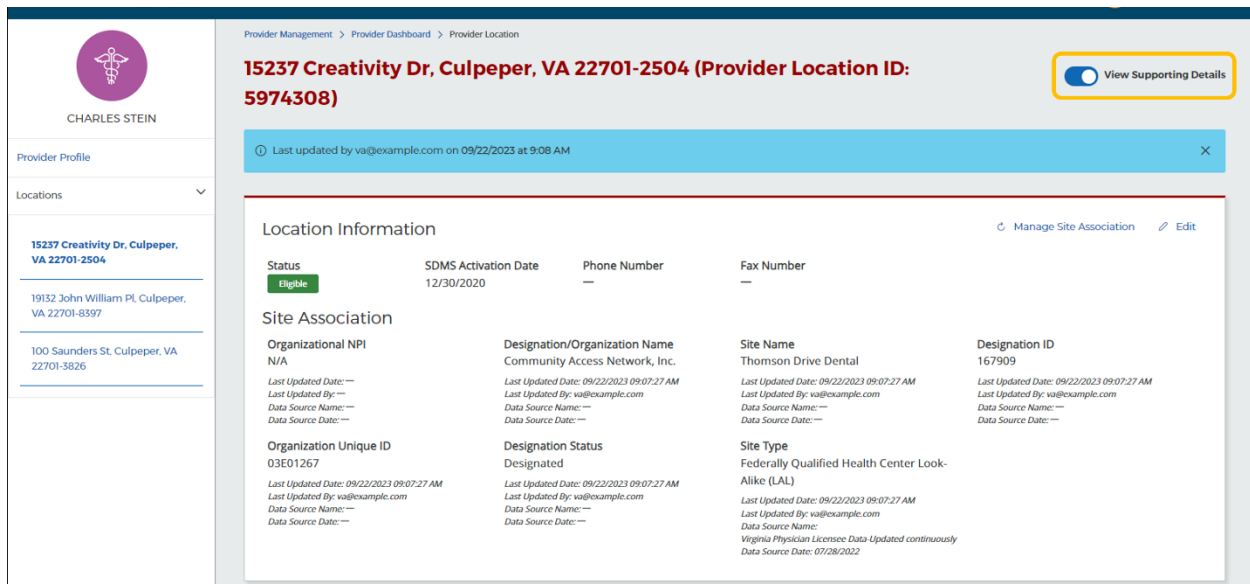
This button allows PCOs to complete their provider location attestations. For information on how to attest to the data in a provider location, see *Section 2.5.2C Attesting Provider Locations*.

## 2.4.9 VIEWING SUPPORTING DETAILS

This toggle controls the display of additional details for editable fields on provider locations. Users can expand or collapse these additional details by selecting the “View Supporting Details” toggle at the top of a provider location.

When selected, the “View Supporting Details” toggle will expand the following supporting details fields to provide additional details regarding the provider data point and its last updated by information:

- Last Updated Date
- Last Updated By
- Data Source Name
- Data Source Date



The screenshot displays the 'Provider Location' page in the SDMS system. On the left is a sidebar with a user profile for Charles Stein and a list of locations. The main content area shows details for '15237 Creativity Dr, Culpeper, VA 22701-2504 (Provider Location ID: 5974308)'. A toggle switch labeled 'View Supporting Details' is in the top right. Below the location name, a blue banner states 'Last updated by va@example.com on 09/22/2023 at 9:08 AM'. The 'Location Information' section shows the status as 'Eligible' and the SDMS Activation Date as 12/30/2020. The 'Site Association' section is expanded, showing four columns of data: Organizational NPI, Designation/Organization Name, Site Name, and Designation ID. Each column contains specific details and a table of update history with columns for Last Updated Date, Last Updated By, Data Source Name, and Data Source Date.

Organizational NPI	Designation/Organization Name	Site Name	Designation ID
N/A	Community Access Network, Inc.	Thomson Drive Dental	167909
<small>Last Updated Date: — Last Updated By: — Data Source Name: — Data Source Date: —</small>	<small>Last Updated Date: 09/22/2023 09:07:27 AM Last Updated By: va@example.com Data Source Name: — Data Source Date: —</small>	<small>Last Updated Date: 09/22/2023 09:07:27 AM Last Updated By: va@example.com Data Source Name: — Data Source Date: —</small>	<small>Last Updated Date: 09/22/2023 09:07:27 AM Last Updated By: va@example.com Data Source Name: — Data Source Date: —</small>

Organization Unique ID	Designation Status	Site Type
03E01267	Designated	Federally Qualified Health Center Look-Alike (LAL)
<small>Last Updated Date: 09/22/2023 09:07:27 AM Last Updated By: va@example.com Data Source Name: — Data Source Date: —</small>	<small>Last Updated Date: 09/22/2023 09:07:27 AM Last Updated By: va@example.com Data Source Name: — Data Source Date: —</small>	<small>Last Updated Date: 09/22/2023 09:07:27 AM Last Updated By: va@example.com Data Source Name: Virginia Physician License Data Updated continuously Data Source Date: 07/28/2022</small>

Figure 46: Provider Location with Supporting Details Displayed





Feature	Description
<b>1. Last Updated Date</b>	This field displays the date and time when the editable field was last updated.
<b>2. Last Updated By</b>	This field displays the email of the PCO who last updated the editable field. If an editable field was automatically set by SDMS, a “System” or “NPPES-Import” user tag will display.
<b>3. Data Source Name</b>	This field displays the short, descriptive name assigned to the provider data source selected by the PCO for this editable field.
<b>4. Data Source Date</b>	This field displays the published date assigned to the provider data source selected by the PCO for this editable field.

Users can view supporting details for the following editable fields on a provider location:

- PCO Omitted Reason
- Organizational NPI
- Designation/Organization Name
- Site Name
- Designation ID
- Organization Unique ID
- Designation Status
- Site Type
- Discipline
- Specialty
- Dental Auxiliaries
- Direct Tour Hours
- Annual Medicaid Claims
- Medicaid Patient %
- Sliding Fee Scale
- American Indian/Alaska Native %
- Homeless %
- Migrant Farmworker %
- Migrant Seasonal Farmworker %
- Intern or Resident?
- J1 Visa Waiver Holder?
- Federal Provider?
- Physical Address Line Fields

If a location was last updated prior to March 20, 2021, the supporting details fields will display without any data.

Clinical Information

Discipline

Primary Care

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Specialty

Pediatrics

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Direct Tour Hours

40

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Populations Served Data

Annual Medicaid Claims

0

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Medicaid Patient %

0%

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Sliding Fee Scale %

0%

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

American Indian/Alaska Native %

0%

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Homeless %

0%

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Migrant Farmworker %

0%

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

Migrant Seasonal Farmworker %

0%

Last Updated Date: --

Last Updated By: --

Data Source Name: --

Data Source Date: --

**Figure 47: Clinical Information Section on Provider Location with Blank Supporting Details**





## USER NOTES

- Address Line Fields (Address Line 1, Address Line 2, City, State, and Postal Code) cannot be updated after a location is created, and their supporting details will not change. For locations imported by the weekly CMS NPPES NPI Delta File, the Last Update By field will display NPPES-import. For user created locations, the Last Updated By field will display the PCO's username.
- When viewing previous revisions of a provider location, users can see the Supporting Details for any revision after November 18, 2023.





## 2.5 EDITING PROVIDER LOCATIONS

On the Provider Profile and Location pages, PCOs can take various actions to edit provider data including adding new locations, updating locations, and omitting locations. PCOs can only edit locations in their assigned state or with a state code of Foreign County (ZZ). PCOs can view Provider Locations across all states and territories but will not be able to edit.

### 2.5.1 ADDING PROVIDER LOCATIONS

On the Provider Profile, PCOs can add new location addresses to any provider in SDMS, even if the provider does not already have a location in their state.

Locations						
STATUS	LOCATION ID	ADDRESS	DISPLAY ADDRESS	DISCIPLINE	SPECIALTY	DIRECT TOUR HOURS
Eligible	6828819	15301 Warren Shingle Rd, Beale Afb, CA 95903-1907	Standardized	Primary Care	Pediatrics	40
Ineligible	5132978	620 John Paul Jones Cir, Portsmouth, VA 23708-2111	Standardized			40

Figure 48: Provider Profile – Add New Location Button

## INSTRUCTIONS

To add a new location address:

1. Select the “Add New Location” button in the Location Summaries section of the Provider Profile
2. Input the “Address Line 1,” “Address Line 2,” “City,” and “Postal Code” information for the new location
3. Update the Discipline and Specialty as necessary
4. Click “Continue”

Add New Location

Address Information
Geocode Review
Site Association
Review Location

**Address Information**  
Add a new location record by entering the following fields.

Address Line 1
Data Source

Address Line 2 (Optional)

City

State

Postal Code

Discipline
Data Source

Specialty
Data Source

Back
Cancel
Continue

Figure 49: Add New Location Modal - Address Information Step





5. Review the geocoded information for the provider location. The location must be successfully geocoded (match level of 3 or lower) before it can be created. For more information on how to geocode a provider location, see *Section 2.5.5C Re-geocode Provider Location*
6. Click “Continue”

**Add New Location**

Address Information | **Geocode Review** | Site Association | Review Location

**Geocode Review**

Review the geocoded information and ensure the location is successfully geocoded.

Map | Satellite | RTH ISLAND | COLONIAL VILLAGE | ROSSLYN | COURT HOUSE | Arlington Blvd | Courthouse Blvd | 10th St N

Address Successfully Geocoded? Yes

Match Level 01 - Address point

Standardized Address 1515 N Courthouse Rd, Arlington, VA 22201-2909

Latitude 38.891142545

Longitude -77.08386259C

Re-geocode

Back Cancel Continue

Figure 50: Add New Location Modal - Geocode Review Step

7. Select a site association for a provider location
  - a. To select a site association, PCOs can choose one of the suggested site associations based on a table of system-generated potential site options. The system will list AutoHPSA sites and Facility Designations that have the same discipline as the provider location and are within one mile of the provider location. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site.
  - b. If the PCO does not see the expected site association, they can manually search for an AutoHPSA site or Facility Designation by selecting the Search for Matching Organization button. Selecting the button will allow PCOs to search for a site association by Designation/Organization Name, Designation ID, or Organization Unique ID. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site. The search criteria will appear automatically if no AutoHPSA sites or Facility Designations are found within a one-mile radius of the provider location.
  - c. PCOs can continue without a site association by selecting the “Skip” button next to the continue button
8. Click “Continue”





Figure 51: Add New Location – Site Association Step

9. Confirm the display address for the provider location. The display address will be defaulted to the standardized address unless the location has been manually geocoded by the PCO
10. Review the information related to the new provider location. To fix any errors, use the “Back” button to navigate to the correct screen and make any necessary changes
11. Click “Save”

Figure 52: Add New Location Modal - Review Location Step

Upon saving, PCOs will be redirected to the new provider location and can update other information about the provider as needed. The system will automatically set certain fields to default values. However PCOs can override default values at any time. For more information on which data fields are set automatically by the system, see *Appendix A – Editable Provider Data Fields*.

For more information on how to update data in an existing provider location, see *Section 2.5.2 Updating Provider Locations*.





A provider location cannot be deleted once it has been created. To remove the address fully from FTE Calculations, PCOs can omit the address. For more information on how to omit a provider location, see *Section 2.5.4 Omitting Provider Locations*.

In the case of a typo or other user error, the user can change the display address to use the standardized address. For more information on setting the display address, see *Section 2.5.2A Changing the Display Address for Provider Locations*. If changing the display address does not correct the error in the address fields, the location will need to be omitted, and a new location will have to be created. For more information about copying existing provider locations, see *Section 2.5.1A Copying Provider Locations*.

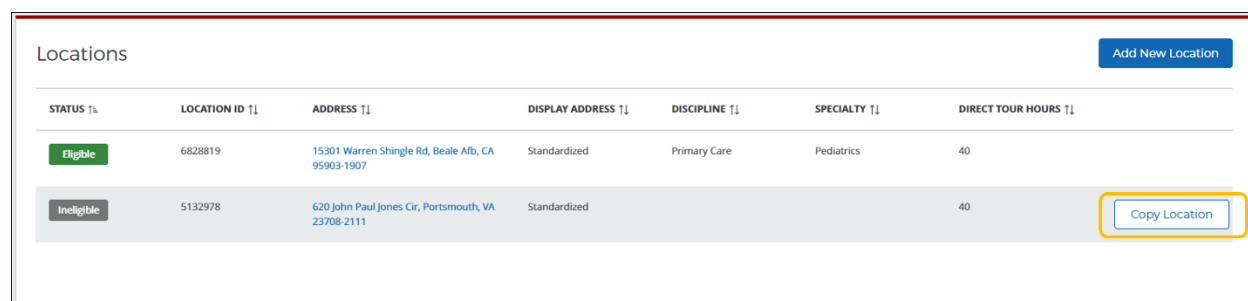
## USER NOTES

- 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.

### 2.5.1A COPYING PROVIDER LOCATIONS

This button will generate a copy of the existing provider location selected. PCOs can only copy addresses in their assigned state.

The address of a location cannot be updated once created. If changing the display address for the provider location does not address any concerns with the address line fields, PCOs should copy the location, fix any incorrect information in the address fields, and then omit the original location with a PCO Omitted Reason of “Duplicate.” For more information on how to omit a provider location, see *Section 2.5.4 Omitting Provider Locations*.



Locations <span>Add New Location</span>						
STATUS	LOCATION ID	ADDRESS	DISPLAY ADDRESS	DISCIPLINE	SPECIALTY	DIRECT TOUR HOURS
Eligible	6828819	15301 Warren Shingle Rd, Beale Afb, CA 95903-1907	Standardized	Primary Care	Pediatrics	40
Ineligible	5132978	620 John Paul Jones Cir, Portsmouth, VA 23708-2111	Standardized			40

Figure 53: Copy Address Button on Provider Profile

## INSTRUCTIONS

To copy an existing location:

- Select the “Copy Location” button next to the desired location in the Location Summaries section of the Provider Profile
- Update the address information as necessary
- Update the Discipline and Specialty as necessary
- Click “Continue”





**Copy Location**

Address Information   Geocode Review   Site Association   Review Location

**Address Information**  
Add a new location record by updating the following fields.

Address Line 1  
1515 North Courthouse Road

Data Source  
Select Data Source

Address Line 2 (Optional)  
Enter Address Line 2

City  
Arlington

State  
VA

Postal Code  
22201

Discipline  
Primary Care

Data Source  
Select Data Source

Specialty  
Internal Medicine

Data Source  
Select Data Source

Back   Cancel   Continue

Figure 54: Copy Location Modal - Address Information Step

5. Review the geocoded information for the provider location. The location must be geocoded before it can be created. For more information on how to geocode a provider location, see *Section 2.5.5C Re-geocode Provider Location*
6. Click “Continue”

**Copy Location**

Address Information   Geocode Review   Site Association   Review Location

**Geocode Review**  
Review the geocoded information and ensure the location is successfully geocoded.

Map   Satellite   Street View

Address Successfully Geocoded? Yes

Match Level 02 - Interpolated street address

Standardized Address 1516 N Courthouse Rd, Arlington, VA 22201-2906

Latitude 38.891192168

Longitude -77.083969606

Re-geocode

Back   Cancel   Continue

Figure 55: Copy Location Modal - Geocode Review Step

7. Select a site association for a provider location
  - a. To select a site association, PCOs can choose one of the suggested site associations based on a table of system-generated potential site options. The system will list AutoHPSA sites and Facility Designations that have the same discipline as the provider location and are within one mile of the provider location. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site.





- b. If the PCO does not see the expected site association, they can manually search for an AutoHPSA site or Facility Designation by selecting the Search for Matching Organization button. Selecting the button will allow PCOs to search for a site association by Designation/Organization Name, Designation ID, or Organization Unique ID. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site. The search criteria will appear automatically if no AutoHPSA sites or Facility Designations are found within a one-mile radius of the provider location.
    - c. PCOs can continue without a site association by selecting the “Skip” button next to the continue button
  8. Click “Continue”

Copy Location

Address Information > Geocode Review > Site Association > Review Location

**Find Site Association**

We identified one or more locations that are similar to the location information on this profile.

Show 5 entries Showing 1 to 1 of 1 entries

DESIGNATION/ ORGANIZATION NAME	DESIGNATION ID	ORGANIZATION UNIQUE ID	SITE NAME	ADDRESS	DESIGNATION STATUS
<input type="radio"/>					

Search for Matching Organization

Back Cancel Skip Continue

Figure 56: Copy Location Modal – Site Association Step

9. Confirm the display address for the provider location. The display address will be defaulted to the standardized address unless the location has been manually geocoded by the PCO
        10. Review the information related to the new provider location. To fix any errors, use the “Back” button to navigate to the correct screen and make any necessary changes
        11. Click “Save”





**Copy Location**

Address Information → Geocode Review → Site Association → **Review Location**

**Review Location**

SET DISPLAY ADDRESS

☐ Physical Address  
1516 North Courthouse Road, Arlington, VA 22201

☒ Standardized Address [Display Address](#)  
1516 N Courthouse Rd, Arlington, VA 22201-2906

**ADDRESS INFORMATION**

<b>Physical Address</b> 1516 North Courthouse Road, Arlington, VA 22201	<b>Address Data Source</b> --
<b>Discipline</b> Primary Care	<b>Discipline Data Source</b> --
<b>Specialty</b> Internal Medicine	<b>Specialty Data Source</b> --

**GEOCODE REVIEW**

Standardized Address	Match Level	Latitude	Longitude
1516 N Courthouse Rd, Arlington, VA 22201-2906	02 - Interpolated street address	38.8911921684	-77.083969606

**SITE MATCHING**

Designation/Organization Name	Designation ID	Organization Unique ID	Site Name
--	--	--	--

[Back](#) [Cancel](#) [Save](#)

**Figure 57: Copy Location Modal - Review Location Step**

Upon saving, PCOs will be redirected to the new provider location and can update other information about the provider as needed. All data in the copied provider location will be carried over to the new provider location including any system default values or PCO-entered values from the original location. For more information on how to update data in an existing provider location, see *Section 2.5.2 Updating Provider Locations*.

## 2.5.2 UPDATING PROVIDER LOCATIONS

PCOs can update provider locations by selecting the “Edit” button in the top right corner of each section of the location.

**Clinical Information** [Edit](#)

<b>Discipline</b> Primary Care	<b>Specialty</b> Obstetrics and Gynecology	<b>Direct Tour Hours</b> 40
-----------------------------------	---	--------------------------------

**Populations Served Data**

<b>Annual Medicaid Claims</b> 0	<b>Medicaid Patient %</b> 0%	<b>Sliding Fee Scale %</b> 0%	<b>American Indian/Alaska Native %</b> 0%
<b>Homeless %</b> 0%	<b>Migrant Farmworker %</b> 0%	<b>Migrant Seasonal Farmworker %</b> 0%	

**Figure 58: Editing Provider Locations**

## INSTRUCTIONS

To update data in an existing provider location:

1. Select the “Edit” button in the top right corner of the desired section
2. Update the necessary information in the Edit Pop-up





3. Select the data source that supports this update (optional)
4. Select the “Save” button

**Edit Clinical Information**

**Clinical Information**

Discipline	Primary Care	Data Source	Select Data Source
Specialty	Family Practice	Data Source	Select Data Source
Direct Tour Hours	24	Data Source	Select Data Source

**Populations Served Data**

Annual Medicaid Claims	0	Data Source	Select Data Source
Medicaid Patient %	0	Data Source	Select Data Source

Save Cancel

**Figure 59: Edit Clinical Information Pop-Up**

Users can edit the following information on a provider location:

- PCO Omitted Reason
- Phone and Fax Number
- Organizational NPI
- Site Type
- Discipline
- Specialty
- Direct Tour Hours
- Dental Auxiliaries (If Dental Health provider)
- Clinical Information and Populations Served Data (e.g. Annual Medicaid Claims)
- Employment Status (e.g., Intern or Resident?)
- Display Address
- Latitude and Longitude

For more information about the fields that can be edited, see *Appendix A – Editable Provider Data Fields*.

## 2.5.2A CHANGING THE DISPLAY ADDRESS FOR PROVIDER LOCATIONS

PCOs can change the display address between the physical address and standardized address by selecting the “Edit” button in the top right hand corner of the Location Address and Geocoded Results section.





**Location Address** Edit

**Physical Address**

Address Line 1	Address Line 2	City	State	Postal Code
25892 N JAMES MADISON HWY	—	NEW CANTON	VA	23123

**Standardized Address** Display Address

Address Line 1	Address Line 2	City	State	Postal Code
25892 N James Madison Hwy	—	New Canton	VA	23123-2234

**Geocoded Results**

Address Successfully Geocoded?	Match Level	Latitude	Longitude	County Name, FIPS	State, FIPS
Yes	01 - Address point	37.6370485209	-78.3608099997	Buckingham, 029	VA, 51

CSD FIPS	Census Tract
5102991212	51029930102

**Map** Satellite

Google Maps showing the location of 25892 N James Madison Hwy, New Canton, VA 23123. The map includes a red pin and a yellow line indicating the route.

**Figure 60: Editing the Location Address and Geocoded Results Section on Provider Locations**

## INSTRUCTIONS

To set the display address for an existing location:

1. Select “Edit” in the Location Address section of a provider location
2. Select the radio button next to the desired display address
3. Select the “Save” button

**Edit Location Address** X

**SET DISPLAY ADDRESS**

☐ Physical Address  
25892 N JAMES MADISON HWY, NEW CANTON, VA 23123

☒ Standardized Address Display Address  
25892 N James Madison Hwy, New Canton, VA 23123-2234

**GEOCODE**

Latitude: 37.6370485209 Longitude: -78.3608099997

**Map** Satellite

Google Maps showing the location of 25892 N James Madison Hwy, New Canton, VA 23123. The map includes a red pin and a yellow line indicating the route.

Save Cancel

**Figure 61: Edit Location Address Pop-Up**





If the location has been manually geocoded or if the location has an unacceptable match level (4 or greater), the Standardized Address option will be disabled. The display address can only be set to the Physical Address.

## 2.5.2B RE-GEOCODING PROVIDER LOCATIONS

PCOs can update the geocoding of a provider location by selecting the “Edit” button in the top right hand corner of the Location Address and Geocoded Results section. Re-geocoding a provider location could change the standardized address.

**Location Address** Edit

**Physical Address**

Address Line 1	Address Line 2	City	State	Postal Code
25892 N JAMES MADISON HWY	—	NEW CANTON	VA	23123

**Standardized Address** Display Address

Address Line 1	Address Line 2	City	State	Postal Code
25892 N James Madison Hwy	—	New Canton	VA	23123-2234

**Geocoded Results**

Address Successfully Geocoded?	Match Level	Latitude	Longitude	County Name, FIPS	State, FIPS
Yes	01 - Address point	37.6370485209	-78.3608099997	Buckingham, 029	VA, 51

CSD FIPS: 5102991212      Census Tract: 51029930102

**Map** Satellite

Map showing the location of the provider. The map includes a red pin indicating the location. The map is labeled with "N James Madison Hwy" and "Gold Hill".

Figure 62: Editing the Location Address and Geocoded Results Section on Provider Locations

## INSTRUCTIONS

To initiate the system geocoding process:

1. Select “Edit” in the Location Address section of a provider location
2. Delete the existing latitude and longitude
3. Select the “Save” button.





Figure 63 shows the 'Edit Location Address' pop-up window. It includes fields for 'Physical Address' and 'Standardized Address', a 'GEOCODE' section with 'Latitude' and 'Longitude' input fields, a map view, and 'Save' and 'Cancel' buttons.

**Figure 63: Edit Location Address Pop-Up**

If the system is unable to geocode the record, PCOs can manually geocode the location by manually dragging the map on the pin or entering the exact latitude and longitude for the provider location. Locations that have been manually geocoded will receive a match level of “0 – User Override.” When a location is manually geocoded, the location will no longer have a standardized address, and the display address will be set to the Physical Address.

## INSTRUCTIONS

To manually geocode provider locations:

1. Select “Edit” in the Location Address section of a provider location
2. Manually drag the pin on the map or enter coordinates in the “Latitude” and “Longitude” fields
3. Select the “Save” button





Location Address
Edit

Physical Address
Display Address

Address Line 1	Address Line 2	City	State	Postal Code
5999 BURKE COMMONS RD	KAISER PERMANENTE BURKE MEDICAL CENTER	BURKE	VA	22015-2880

Standardized Address

Address Line 1	Address Line 2	City	State	Postal Code
-	-	-	VA	-

Geocoded Results

Address Successfully Geocoded?	Match Level	Latitude	Longitude	County Name, FIPS	State, FIPS
Yes	0 - User override	38.7886400983	-77.2997584762	Fairfax, 059	VA, 51
CSD FIPS	Census Tract				
5105990464	51059432201				

Map
Satellite

Figure 64: Provider Location that has been Manually Geocoded

## 2.5.2C ATTESTING PROVIDER LOCATIONS

PCOs can attest to the data in a provider location by selecting the “Attest this Location” button at the bottom of the provider location.

Attested by texas@example.com on 01/08/2021 at 1:56 PM

Attest Provider Location

Figure 65: Attesting Provider Locations

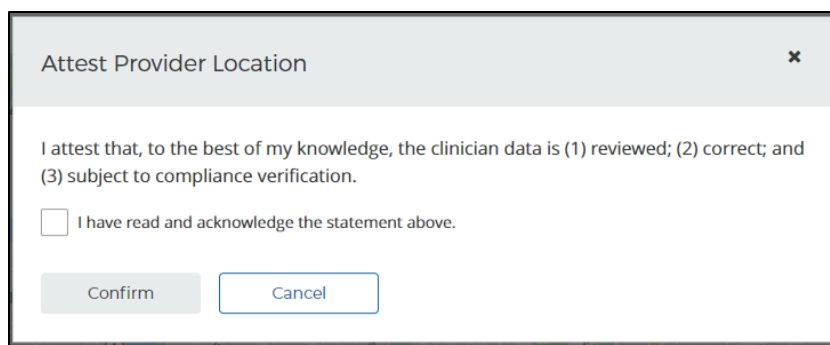
## INSTRUCTIONS

To attest a provider location:

1. Select the “Attest Provider Location” button
2. Select the checkbox
3. Select the “Confirm” button







A modal dialog box titled "Attest Provider Location" with a close button (X) in the top right corner. The dialog contains the following text: "I attest that, to the best of my knowledge, the clinician data is (1) reviewed; (2) correct; and (3) subject to compliance verification." Below this text is a checkbox with the label "I have read and acknowledge the statement above." At the bottom of the dialog are two buttons: "Confirm" and "Cancel".

Figure 66: Provider Attestation Pop-Up

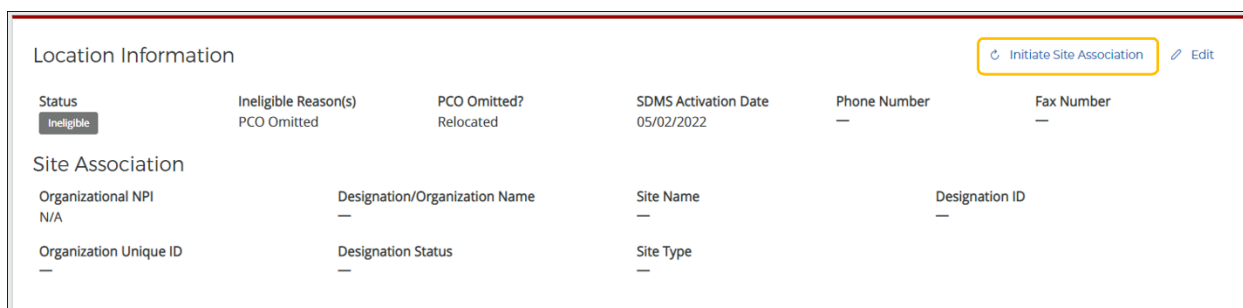
Once the data in provider location has been attested to, a banner will display with information on who last attested to the location and when the attestation occurred.

## 2.5.3 MANAGING SITE ASSOCIATIONS

PCOs can associate a provider location to a healthcare delivery site in the Location Information Section. Healthcare delivery sites are limited to locations that already exist in SDMS: Auto-HPSA Organizations and Facility Designations.

### 2.5.3A INITIATING SITE ASSOCIATIONS

PCOs can add a new site association to a provider location by selecting the “Initiate Site Association” button in the top right hand corner of the Location Information section.



The "Location Information" section of the SDMS interface. It includes a table with the following columns: Status, Ineligible Reason(s), PCO Omitted?, SDMS Activation Date, Phone Number, and Fax Number. The "Status" column shows "Ineligible". Below the table is a "Site Association" section with a table containing columns: Organizational NPI, Designation/Organization Name, Site Name, and Designation ID. The "Organizational NPI" column shows "N/A". At the top right of the "Location Information" section is a button labeled "Initiate Site Association" and an "Edit" link.

Figure 67: Initiating a Site Association from the Location Information Section on Provider Locations

## INSTRUCTIONS

To initiate a site association:

1. Select “Initiate Site Association” in the Location Information section of a provider location
2. To select a site association
  - a. To select a site association, PCOs can choose one of the suggested site associations based on a table of system-generated potential site options. The system will list AutoHPSA sites and Facility





Designations that have the same discipline as the provider location and are within one mile of the provider location. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site.

- b. If the PCO does not see the expected site association, they can manually search for an AutoHPSA site or Facility Designation by selecting the Search for Matching Organization button. Selecting the button will allow PCOs to search for a site association by Designation/Organization Name, Designation ID, or Organization Unique ID. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site.
3. Select the radio button next to the desired site association
4. Select the “Save” button

**Initiate Site Association**

**Find Matching Site**

Show 5 entries Showing 1 to 5 of 15 entries

DESIGNATION/ ORGANIZATION NAME	DESIGNATION ID	ORGANIZATION UNIQUE ID	SITE NAME	ADDRESS	DESIGNATION STATUS

Search for Matching Organization

Save Cancel

Figure 68: Initiate Site Association Modal

After saving the site association, the system will populate the following fields in the Location Information section based on the chosen site: Designation/Organization Name, Site Name, Designation ID, Organization Unique ID, Designation Status, and Site Type. PCOs can override the defaulted Site Type for a provider location using the Edit Location Information modal. For more information on editing existing provider locations, see *Section 2.5.2 Updating Provider Locations*.



## USER NOTE

- The system will automatically show the manual search criteria for a site association if the system is unable to find an AutoHPSA site or Facility Designation within a one-mile radius of the provider location (see *Figure 69: Searching for a Site Association When the System Does Not Display System Suggestions*).
- The system cannot find system suggested site associations for locations that have been unsuccessfully geocoded (match level of 4 or greater). PCOs can search for a site association or manually geocoded the location to generate the list of system suggestions. For additional information on manually geocoding a provider location, see *Section 2.5.2B Re-Geocoding Provider Locations*.

**Figure 69: Searching for a Site Association When the System Does Not Display System Suggestions**

## 2.5.3B REPLACING EXISTING SITE ASSOCIATIONS

PCOs can change the site association of a provider location by selecting the “Manage” button in the top right hand corner of the Location Information section.

**Figure 70: Managing a Site Association from the Location Information Section on Provider Locations**

## INSTRUCTIONS





To replace a site association:

1. Select “Manage Site Association” in the Location Information section of a provider location
2. Select the “Replace Site Association” radio button
3. To select a site association
  - a. To select a site association, PCOs can choose one of the suggested site associations based on a table of system-generated potential site options. The system will list AutoHPSA sites and Facility Designations that have the same discipline as the provider location and are within one mile of the provider location. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site.
  - b. If the PCO does not see the expected site association, they can manually search for an AutoHPSA site or Facility Designation by selecting the Search for Matching Organization button. Selecting the button will allow PCOs to search for a site association by Designation/Organization Name, Designation ID, or Organization Unique ID. Choose the correct site by clicking on the radio button next to the desired healthcare delivery site.
4. Select the radio button next to the desired display address
5. Select the “Save” button

**Manage Site Association**

**Current Site Association**

<b>Designation/Organization Name</b>	<b>Designation ID</b>	<b>Organization Unique ID</b>	<b>Site Name</b>
Greater Prince William Area Community Health Center, Inc.	159376	03E00049	GPW Health Center - Woodbridge
<b>Designation Status</b>	<b>Site Type</b>	<b>Address</b>	
Designated	Federally Qualified Health Center (FQHC)	13168 CENTERPOINTE WAY, SUITE #101, WOODBRIDGE, VA 22193-5287	

**Action**

☒ Replace Site Association ☐ Remove Site Association

**Find Matching Site**

Show  entries Showing 1 to 5 of 15 entries

DESIGNATION/ ORGANIZATION NAME	DESIGNATION ID	ORGANIZATION UNIQUE ID	SITE NAME	ADDRESS	DESIGNATION STATUS

Figure 71: Replacing a Site Association in the Manage Site Association Modal with System Suggestions





After saving the site association, the system will update the following fields in the Location Information section based on the chosen site: Designation/Organization Name, Site Name, Designation ID, Organization Unique ID, Designation Status, and Site Type.

#### USER NOTE

- The system will automatically the manual search criteria for a site association if the system is unable to find an AutoHPSA site or Facility Designation within a one-mile radius of the provider location (*see Figure 72: Searching for a Site Association When the System Does Not Display System Suggestions*).
- The system cannot find system suggested site associations for locations that have been unsuccessfully geocoded (match level of 4 or greater). PCOs can search for a site association or manually geocoded the location to generate the list of system suggestions. For additional information on manually geocoding a provider location, see *Section 2.5.2B Re-Geocoding Provider Locations*.

**Manage Site Association**

Action

☒ Replace Site Association ☐ Remove Site Association

**Find Matching Site**

The system was unable to find a matching site association. Associate the provider location to a facility by searching using the following criteria.

Please enter one or more criteria to search for an organization or site

Designation/Organization Name Designation ID Organization Unique ID

Enter Designation or Org Enter Designation ID Enter Organization Unique ID Search

DESIGNATION/ ORGANIZATION NAME	DESIGNATION ID	ORGANIZATION UNIQUE ID	SITE NAME	ADDRESS	DESIGNATION STATUS
There are currently no sites to display.					

Save Cancel

Figure 72: Searching for a Site Association When the System Does Not Display System Suggestions

### 2.5.3C REMOVING EXISTING SITE ASSOCIATIONS

PCOs can remove the site association of a provider location by selecting the “Manage” button in the top right-hand corner of the Location Information section.





Location Information			
Status	SDMS Activation Date	Phone Number	Fax Number
Eligible	05/02/2022	—	—
Site Association			
Organizational NPI N/A	Designation/Organization Name Community Access Network, Inc.	Site Name Thomson Drive Dental	Designation ID 167909
Organization Unique ID 03E01267	Designation Status Designated	Site Type Federally Qualified Health Center Look-Alike (LAL)	

Figure 73: Managing a Site Association from the Location Information Section on Provider Locations

## INSTRUCTIONS

To remove a site association:

1. Select “Manage Site Association” in the Location Information section of a provider location
2. Select the “Remove Site Association” radio button
3. Select the “Save” button

Current Site Association			
Designation/Organization Name	Designation ID	Organization Unique ID	Site Name
Community Access Network, Inc.	167909	03E01267	Thomson Drive Dental
Designation Status	Site Type	Address	
Designated	Federally Qualified Health Center Look-Alike (LAL)	167909	

Action

☐ Replace Site Association ☒ Remove Site Association

Caution! You are about to remove the Site Association for this provider location.

Save Cancel

Figure 74: Removing a Site Association in the Manage Site Association Modal

Upon save, the system will remove the following fields in the Location Information section based on the chosen site: Designation/Organization Name, Site Name, Designation ID, Organization Unique ID, and Designation Status. The Site Type will not be removed from the provider location. PCOs can remove the Site Type using the Edit Location Information modal.

### 2.5.4 OMITTING PROVIDER LOCATIONS

A PCO may omit a provider location at any time by selecting a “PCO Omitted Reason.”





Location Information Initiate Site Association Edit

Status Ineligible	Ineligible Reason(s) PCO Omitted	PCO Omitted? Relocated	SDMS Activation Date 05/02/2022	Phone Number —	Fax Number —
----------------------	-------------------------------------	---------------------------	------------------------------------	-------------------	-----------------

Site Association

Organizational NPI N/A	Designation/Organization Name —	Site Name —	Designation ID —
Organization Unique ID —	Designation Status —	Site Type —	

Figure 75: Location Information Section for an Ineligible Provider Location

## INSTRUCTIONS

To omit a provider location:

1. Select the Edit button in the Location Information section
2. Select a “PCO Omitted Reason” from the drop-down menu
3. Select the data source that supports this omission (optional)
4. Click the “Save” button at the bottom of the modal

Edit Location Information

PCO Omitted Reason: Select PCO Omitted Reason

Data Source: Select Data Source

Phone Number: Enter Phone Number

Fax Number: Enter Fax Number

Site Type: Select Site Type

Data Source: Select Data Source

Save Cancel

Figure 76: PCO Omitted Reason Field in the Edit Location Information Pop-up

For more information on specific PCO Omitted Reasons, see *Appendix C – Ineligible Reasons and PCO Omitted Reasons*.

PCOs can remove a PCO Omitted Reason at any time. If there is more than one ineligible reason, the location will remain ineligible until all the ineligible reasons have been addressed.

## INSTRUCTIONS

To remove a PCO Omitted Reason:

1. Select the Edit button in the Location Information section
2. Select the “x” in the PCO Omitted Reason drop-down (see *Figure 77: Removing a PCO Omitted Reason*)
3. Select the data source file that supports making this location eligible (optional)





4. Click the “Save” button at the bottom of the modal

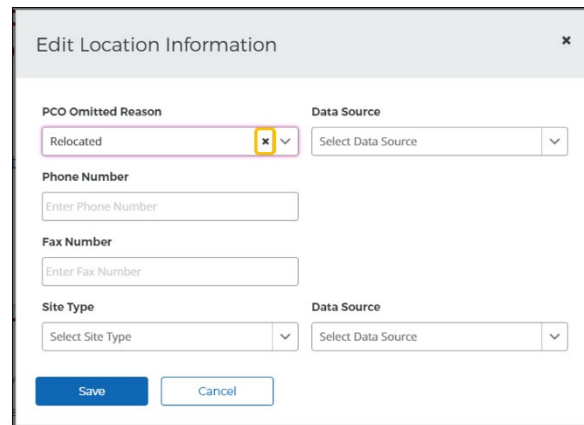


Figure 77: Removing a PCO Omitted Reason

### 2.5.5 ADDRESSING NEEDS REVIEW FLAGS

PCOs can clear Needs Review flags on provider locations by selecting the hyperlinked text indicating what action needs to be taken to resolve the flag.

The following flags can appear on provider locations:

- Complete Annual Provider Location Attestation
- Review Direct Tour Hours Greater Than 40
- Re-geocode Provider Location
- Review New Provider Location
- Review State Geocoded Mismatch
- Review Foreign Country Location
- Review New NPI Primary Address
- Review Primary Taxonomy Change

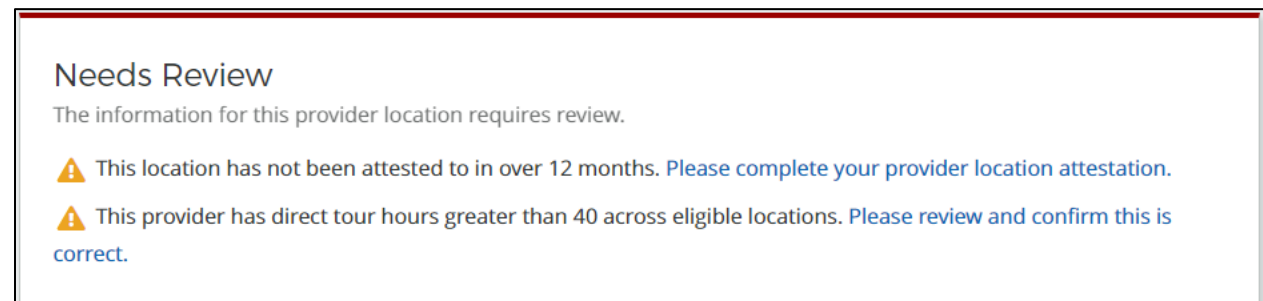


Figure 78: Needs Review Section on Provider Locations

## INSTRUCTIONS

To address a Needs Review flag:





1. Click the hyperlinked text next to the Needs Review Flag
2. Complete the suggested action in the selected Needs Review pop-up modal

### 2.5.5A COMPLETE ANNUAL PROVIDER LOCATION ATTESTATION

The provider location has not been attested to in the last 12 months. For new provider locations, this flag will first appear 12 months after its SDMS Activation Date. Provider locations must also have a status of 'Eligible' for one year before this flag will appear. This flag will not apply to provider locations that are ineligible for any reason or locations with the state code Foreign Country (ZZ).

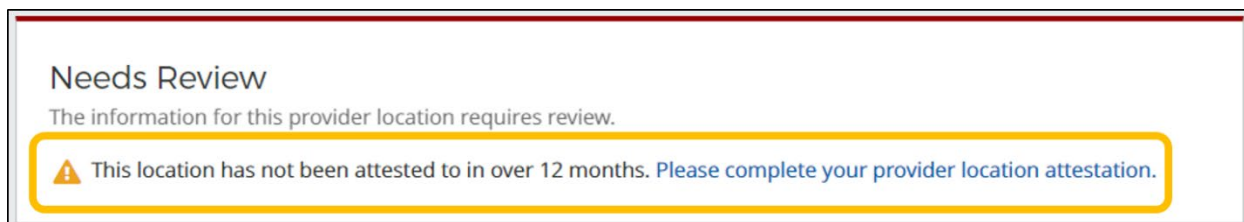


Figure 79: Needs Review Section on Provider Locations

This flag can be resolved by completing the provider location attestation. Selecting the hyperlinked text for this Needs Review flag will open the Attest Provider Location pop-up modal. For more information on attesting to provider locations, see *Section 2.5.2C Attesting Provider Locations*.

### 2.5.5B REVIEW DIRECT TOUR HOURS GREATER THAN 40

The total sum of direct tour hours across the provider's eligible locations are greater than 40. This flag will be present if a single eligible location has greater than 40 direct tour hours or if a provider has multiple locations whose total sum of direct tour hours are greater than 40. This flag will not apply to provider locations that are ineligible for any reason or locations with the state code Foreign Country (ZZ).

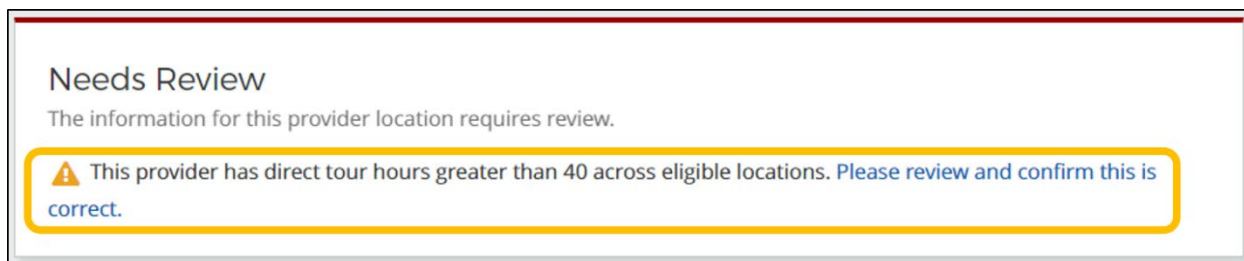


Figure 80: Review Tour Hours Greater Than 40 Flag

This flag can be resolved in two ways:

1. Confirming the data is correct in the Review Direct Tour Hours pop-up modal (see *Figure 81*). Selecting the hyperlinked text for this Needs Review flag will open the Review Direct Tour Hours pop-up modal.
2. Adjusting the tour hours or eligibility of the provider's locations so the total sum of direct tour hours of eligible locations are 40 hours or less.





In the Review Direct Tour Hours pop-up modal, PCOs will be able to view a list of the provider's eligible locations and each location's direct tour hours. Selecting the location address will navigate the PCO to the chosen provider location where any needed updates can be made.

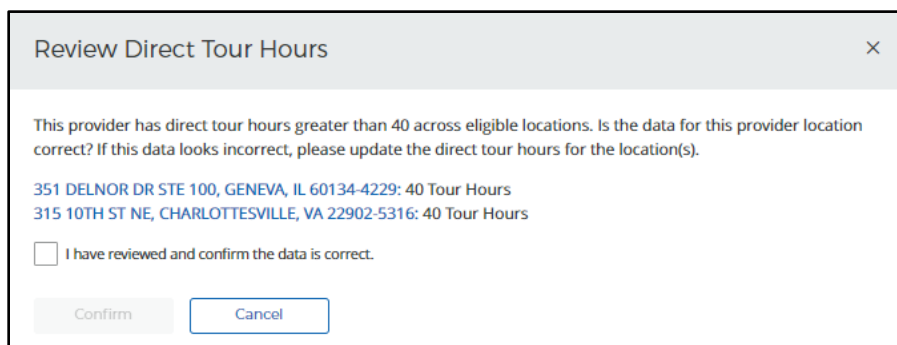
A screenshot of a web modal titled "Review Direct Tour Hours" with a close button (X) in the top right corner. The modal contains a message: "This provider has direct tour hours greater than 40 across eligible locations. Is the data for this provider location correct? If this data looks incorrect, please update the direct tour hours for the location(s)." Below this message are two lines of text, each preceded by a blue hyperlink: "351 DELNOR DR STE 100, GENEVA, IL 60134-4229: 40 Tour Hours" and "315 10TH ST NE, CHARLOTTESVILLE, VA 22902-5316: 40 Tour Hours". Below the links is a checkbox with the text "I have reviewed and confirm the data is correct." At the bottom of the modal are two buttons: "Confirm" (disabled) and "Cancel" (active).

Figure 81: Review Direct Tour Hours Pop-Up Modal

If the PCO clears the flag by confirming the data in the Review Direct Tour Hours pop-up modal, the flag will need to be individually cleared from each impacted provider location. If the flag is cleared using this method, the flag will be re-thrown in 12 months if the direct tour hours across a provider's eligible locations remain greater than 40.

Adjusting the tour hours and eligibility of provider locations will automatically clear the flag from all impacted locations once the total sum of Direct Tour Hours are no longer greater than 40.

#### USER NOTES

- The Confirm button will not be enabled until the checkbox indicating the data has been reviewed is selected.

#### 2.5.5C RE-GEOCODE PROVIDER LOCATION

The provider location has a "Not Geocoded" ineligible reason due to a HDW geocoding match level of 4 or greater. This flag will not apply to provider locations that have been deactivated by CMS (Ineligible Reason of "CMS Deactivated"), locations that do not have a discipline or specialty (Ineligible Reason of "No Discipline/Specialty"), locations that have been omitted by a PCO (Ineligible Reason of "PCO Omitted"), or locations with a state code of Foreign Country (ZZ).

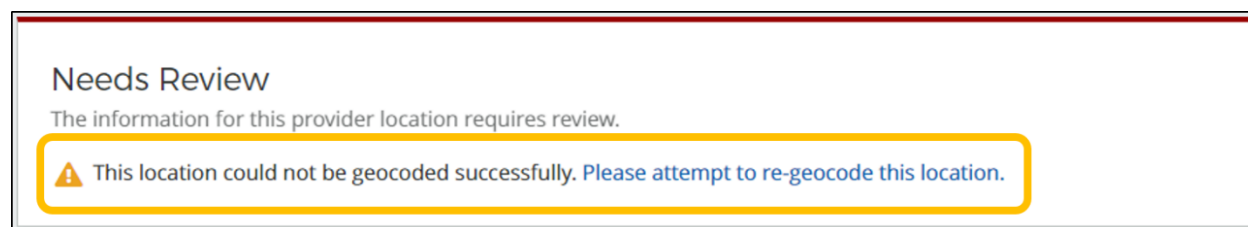
A screenshot of a "Needs Review" flag. The title "Needs Review" is in bold. Below it is the text "The information for this provider location requires review." A yellow-bordered box contains a warning icon (exclamation mark in a triangle) followed by the text "This location could not be geocoded successfully. Please attempt to re-geocode this location." The text "Please attempt to re-geocode this location." is a blue hyperlink.

Figure 82: Re-geocode Provider Location Flag

This flag can be resolved by re-geocoding the provider location and receiving an acceptable match level (3 or lower). Selecting the hyperlinked text next to this flag will open the Edit Location Address pop-up modal. For more information on re-geocoding provider locations, see *Section 2.5.2B Re-Geocoding Provider Locations*.



If the system cannot geocode the provider location and the latitude and longitude is unknown, PCOs will need to omit the existing provider location using the “Duplicate” PCO Omitted Reason and create a new location with the correct address. For more information on omitting a provider location, see *Section 2.5.4 Omitting Provider Locations*. For more information on adding new provider locations, see *Section 2.5.1 Adding Provider Locations*.

## 2.5.5D REVIEW NEW PROVIDER LOCATION

The provider location has recently been imported by CMS through the CMS-NPPES Delta file and has a “New, Not Reviewed” ineligible reason. Provider locations receive the “New, Not Reviewed” ineligible reason when the provider location was imported into SDMS from CMS but has not been reviewed and/or updated by the PCO. This flag will not apply to locations that have been deactivated by CMS (Ineligible Reason of “CMS Deactivated”), locations that do not have a discipline or specialty (Ineligible Reason of “No Discipline/Specialty), or locations with a state code of Foreign Country (ZZ).

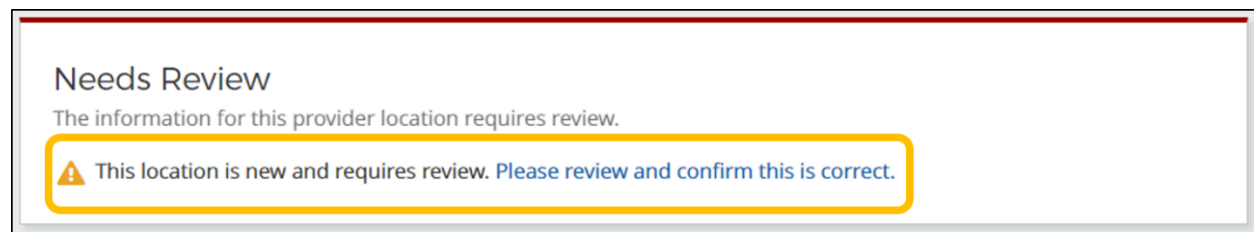


Figure 83: Review New Provider Location Flag

This flag can be removed in several ways:

1. If data needs to be updated in the provider location, PCOs can remove the “New, Not Reviewed” Ineligible Reason by:
  - a. Updating any data point using the pop-up edit modals in any section on a provider location. For more information on updating provider locations using the pop-up edit modals, see *Section 2.5.2 Updating Provider Locations*.
  - b. Updating any data point on the Search Grid. For more information on editing provider locations using the Provider Search Results Grid, see *Section 2.2.4 Editing Provider Locations in the Search Results Grid*.
2. If no data needs to be changed, PCOs can remove the “New, Not Reviewed” Ineligible Reason by:
  - a. Confirming the data is correct in the Review Provider Location pop-up modal (see *Figure 84*). Selecting the hyperlinked text for this Needs Review flag will open the Review New Provider Location pop-up modal
  - b. Attesting to the data in the provider location. For more information on attesting to a provider location, see *Section 2.5.2C Attesting Provider Locations*.
3. The “New, Not Reviewed” Ineligible Reason can be removed in bulk using the “Update” action on an import file. No additional data needs to be changed for the Ineligible Reason to be removed. For more information on updating existing provider locations using the Provider Import Tool, see *Section 2.6.3C Updating an Existing Provider Location*.



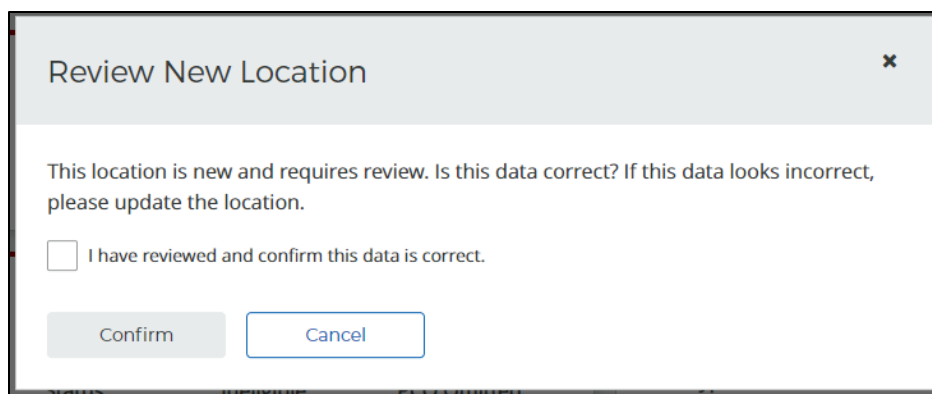


Figure 84: Review New Provider Location Pop-Up Modal

If the New Provider Location flag is present on a provider location for six months, the location does not have the Certified Nurse Midwife specialty, and no action has been taken by a PCO, the system will automatically remove the “New, Not Reviewed” ineligible reason and populate the SDMS Activation Date. If no other ineligible reason is present, the location will become eligible. For locations with the Certified Nurse Midwife specialty, the system will automatically remove the “New, Not Reviewed” ineligible reason and populate the SDMS Activation Date after one year.

#### USER NOTES

- The Confirm button will not be enabled until the checkbox indicating the data has been reviewed is selected.

#### 2.5.5E REVIEW STATE GEOCODED MISMATCH

The provider location’s location address state and geocoded state are not the same. The location address state is the state reported by the provider to CMS or added by PCOs. The geocoded address state is returned by HDW when the provider location is geocoded. This flag will not apply to provider locations that have been deactivated by CMS (Ineligible Reason of “CMS Deactivated”), locations that do not have a discipline or specialty (Ineligible Reason of “No Discipline/Specialty), locations that have been omitted by a PCO (Ineligible Reason of “PCO Omitted”), or locations with a state code of Foreign Country (ZZ).

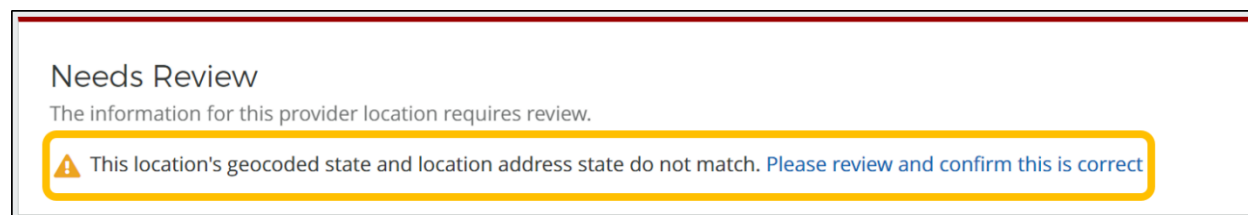


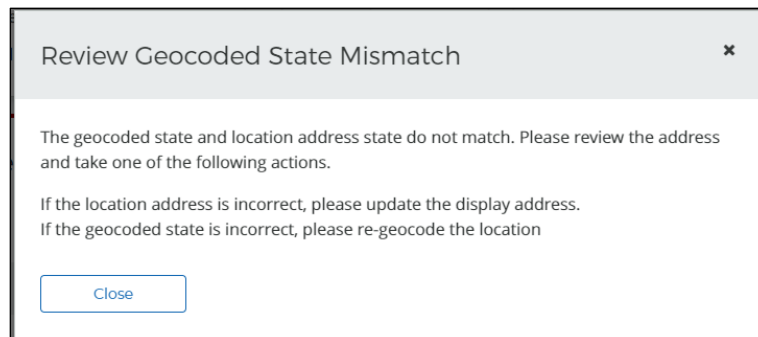
Figure 85: Review State Geocoded Mismatch Flag

If the location address state is incorrect, this flag can be resolved by changing the display address for the provider location. For more information on changing the display address of a provider location, see *Section 2.5.2A Changing the Display Address for Provider Locations*. For more information on omitting provider locations, see *Section 2.5.4 Omitting Provider Locations*.





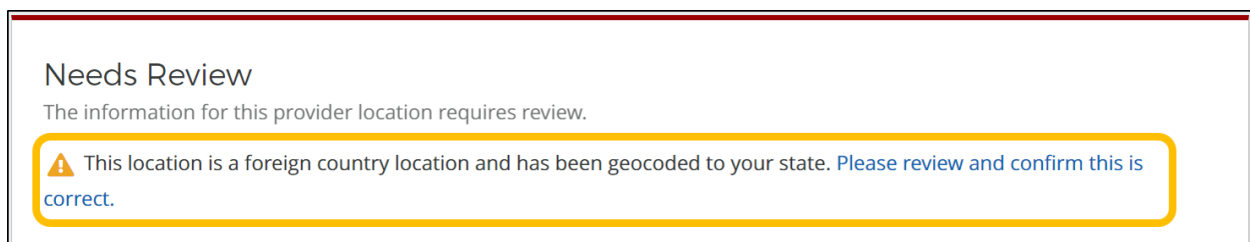
If the geocoded address state is incorrect, this flag can be resolved by re-geocoding the provider location so the location address state and geocoded state match. For more information on geocoding provider locations, see *Section 2.5.2B Re-Geocoding Provider Locations*.



**Figure 86: Review State Geocoded Mismatch Pop-Up Modal**

## 2.5.5F REVIEW FOREIGN COUNTRY LOCATION

The provider location has a state code of Foreign Country (ZZ) and has been geocoded to a U.S. State or Territory. This flag will not apply to provider locations that are ineligible for any reason.



**Figure 87: Review Foreign Country Location Flag**

This flag can be resolved by omitting the provider location. For more information on omitting provider locations, see *Section 2.5.4 Omitting Provider Locations*.

If the provider location is a valid practice location, a new location should be created with the correct U.S. State or Territory. For more information on creating new provider locations, see *Section 2.5.1 Adding Provider Locations*.





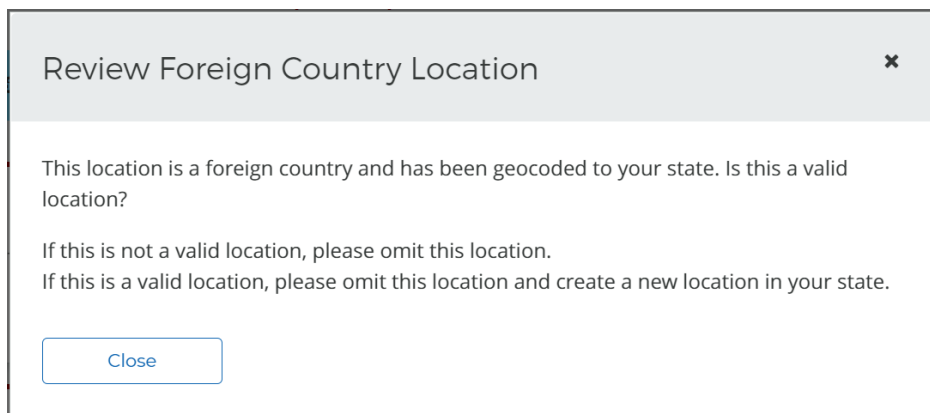


Figure 88: Review Foreign Country Location Pop-Up Modal

## 2.5.5G REVIEW NPI PRIMARY ADDRESS CHANGE

The provider reported a new practice address to CMS. This flag will appear on the provider's other eligible locations and the new provider location created for the NPI Primary Address Change. This flag will not apply to locations with a state code of Foreign Country (ZZ).

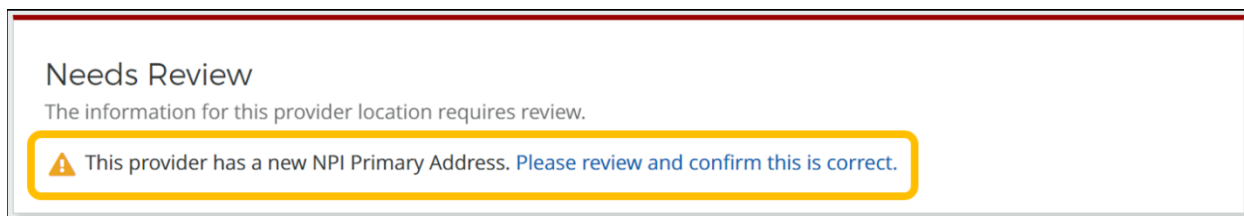


Figure 89: Review NPI Primary Address Change Flag

This flag can be cleared by confirming the data is correct in the Review NPI Primary Address pop-up modal (see *Figure 90*). Selecting the hyperlinked text for this Needs Review flag will open the Review NPI Primary Address pop-up modal.

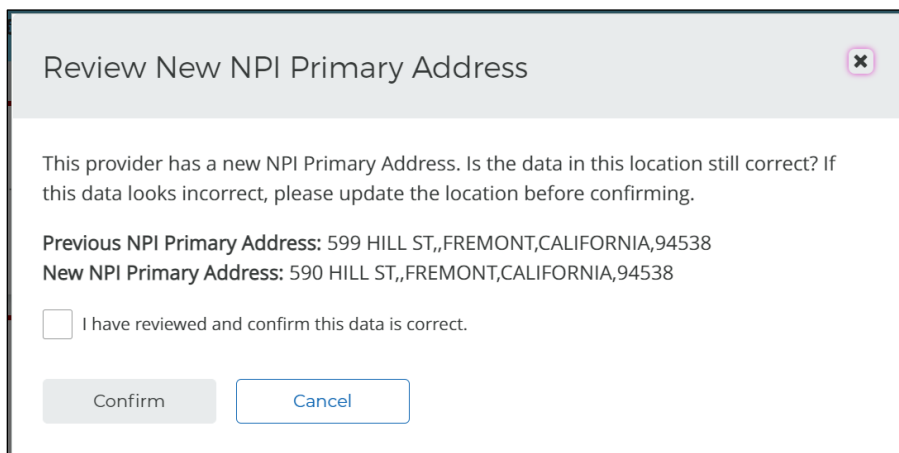


Figure 90: Review NPI Primary Address Change Pop-Up Modal





The Review New NPI Primary Address flag will need to be individually cleared from each impacted provider location. If the location has both the Review New NPI Primary Address flag and the “New, Not Reviewed” ineligible reason, clearing the Review New NPI Primary Address flag will also clear the “New, Not Reviewed” ineligible reason and populate the SDMS Activation Date.

## 2.5.5H REVIEW PRIMARY TAXONOMY CHANGE

The provider reported a new primary taxonomy to CMS, and the new taxonomy has been mapped to a discipline and specialty. For more information on active taxonomies, see the *Manual for Policies and Procedures*. This flag will not apply to provider locations that have been deactivated by CMS (Ineligible Reason of “CMS Deactivated”), locations that have been omitted by a PCO (Ineligible Reason of “PCO Omitted”), or locations with a state code of Foreign Country (ZZ).

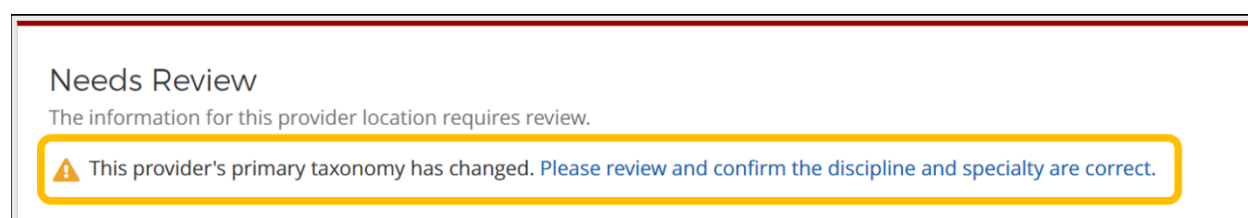


Figure 91: Review NPI Primary Address Change Flag

This flag can be cleared by confirming the data is correct in the Review Primary Taxonomy Change pop-up modal (see Figure 90). Selecting the hyperlinked text for this Needs Review flag will open the Review Primary Taxonomy Change pop-up modal.

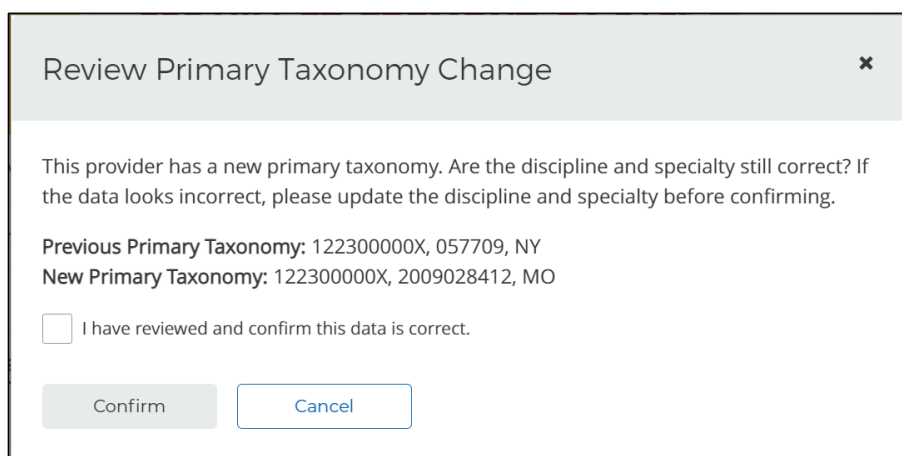


Figure 92: Review NPI Primary Address Change Pop-Up Modal

The Review Primary Taxonomy Change flag will need to be individually cleared from each impacted provider location. If the location has both the Review Primary Taxonomy Change flag and the “New, Not Reviewed” ineligible reason, clearing the Review Primary Taxonomy Change flag will also clear the “New, Not Reviewed” ineligible reason and populate the SDMS Activation Date.

If the Review Primary Taxonomy Change flag is present on a provider location for six months and no action has been taken by a PCO, the system will automatically remove the flag and update the Discipline and Specialty to





match the new primary taxonomy. If the provider's new primary taxonomy is not an active taxonomy, the system will remove the discipline and specialty from the provider location and add the "No Discipline/Specialty" ineligible reason.





## 2.6 USING THE PROVIDER IMPORT TOOL

The Provider Import Tool provides PCOs the capability to add, update, or omit provider locations in bulk by modifying a system-generated Excel file. With the newly re-designed Provider Import Tool, PCOs can create Provider Uploads using a deconstructed download process. In addition, they can review additional information about their processed files and download new import files with any rejected records.

To access the import tool, PCOs can navigate to the Provider Upload page from the Provider Management Landing Page.

The screenshot displays the HRSA Provider Management dashboard. At the top, the HRSA logo and 'Provider Management' title are on the left, while navigation links (Home, Designations, Providers, Tools, Manage Users) and a user profile icon are on the right. The main content area is titled 'Provider Management' and features a 'Provider Dashboard' section with six metrics: 7 System Action Pending, 384 Complete Annual Provider Location Attestation, 312 Review Direct Tour Hours Greater than 40, 115 Review New Provider Location, 1 Geocoding Issues, and 1,339 NPPE Updates. Below this, the 'Provider Search' section includes filters for State, County Name, Discipline, Specialty, First Name, Last Name, NPI, and Status, along with a 'Search' button. The 'Provider Bulk Actions' section contains 'Manage Provider Uploads' and 'Attest Provider Locations' buttons. The 'Provider Data Sources' section has a 'Manage Data Sources' button.

Figure 93: Navigation to the Provider Upload Page and Import Tool





## 2.6.1 VIEWING PROVIDER UPLOADS

On the Provider Upload Landing Page, PCOs can view summary information about the import files they are actively working on and any files they previously uploaded to the system.

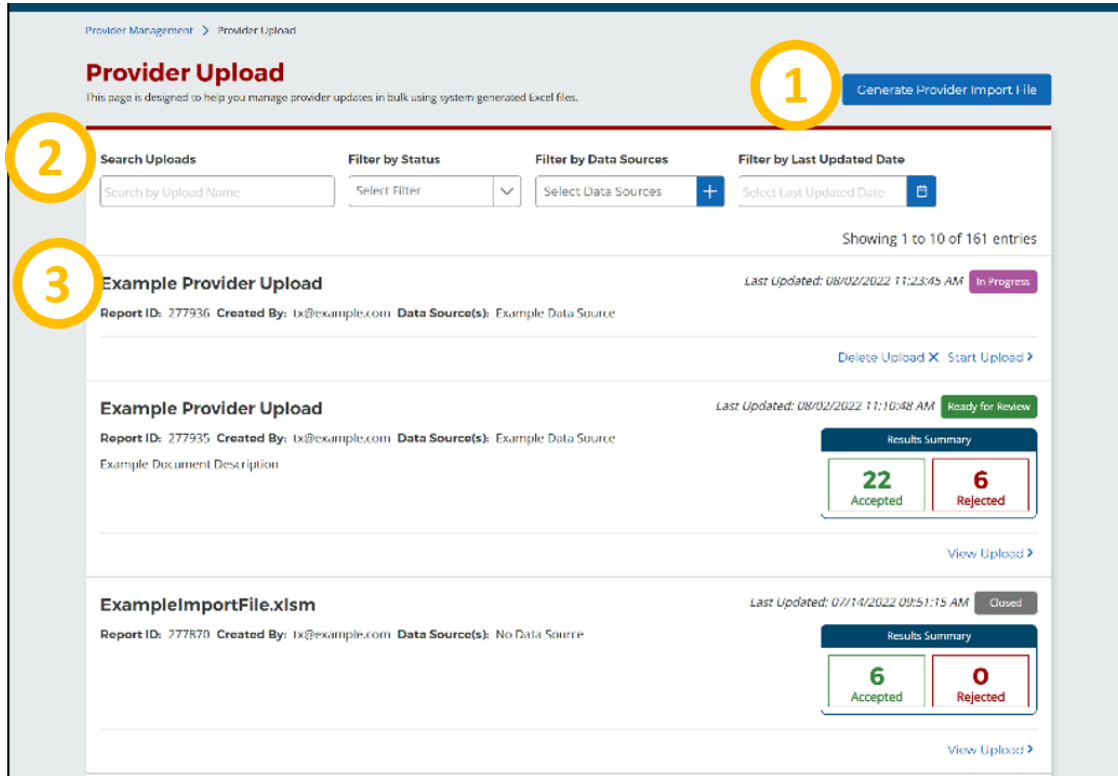


Figure 94: Provider Upload Landing Page

### Feature

#### 1. Generate Provider Import File

### Description

This button allows PCOs to create new Provider Uploads and system-generated Import Files. For more information on creating new Provider Uploads, see 2.6.2A *Generating Provider Import Files from the Provider Upload Landing Page*

#### 2. Provider Upload Search

This section allows users to search for Provider Uploads. For more information about searching for Provider Uploads, see 2.6.1A *Searching for Provider Uploads*.

#### 3. Provider Upload Summary Card

This section shows a summary of a Provider Upload. Each Provider Upload in a PCO's state will appear as a separate card on the Provider Upload Landing Page.

On the Provider Upload Landing Page, PCOs will be able to see a summary of the import files processed by the system for their state.





The screenshot shows a 'Provider Upload Summary Card' with the following elements and callouts:

- 1**: Title 'Example Provider Upload'
- 2**: 'Report ID: 27'
- 3**: 'Created By: tx@example.com'
- 4**: 'Data Source(s): Example Data Source'
- 5**: 'Last Updated: 08/02/2022 11:10:48 AM' and a green 'Ready for Review' status badge (**6**)
- 7**: 'Example Document Description' text area
- 8**: 'Results Summary' box showing '22 Accepted' and '6 Rejected'
- 9**: 'View Upload >' button

Figure 95: Provider Upload Summary Card

Feature	Description
<b>1. Provider Upload Title</b>	This field shows the user-entered title of the Provider Upload.
<b>2. Report ID</b>	This field shows the system-assigned Report ID for the Provider Upload.
<b>3. Created By</b>	This field shows the PCO who initiated the Provider Upload.
<b>4. Data Source(s)</b>	This field shows the Data Sources associated with the Provider Upload. If the PCO did not assign a data source to the editable columns in their import file, this field will show “No Data Source.”
<b>5. Last Updated</b>	This field shows the last time a PCO updated the Provider Upload. Updates include generating the Provider Upload, uploading the import file to the system, and closing the Provider Upload.
<b>6. Status</b>	This field shows the status of the Provider Upload. Status options include: <ul style="list-style-type: none"><li>• In Progress</li><li>• Processing</li><li>• Canceled</li><li>• Ready for Review</li><li>• Closed</li></ul>
<b>7. Document Description</b>	This field shows the user entered description for the Provider Upload.
<b>8. Results Summary</b>	This field shows the number of accepted and rejected records for the Provider Upload. The Results Summary will only appear for Provider Uploads with a “Ready for Review” or “Closed” status.
<b>9. Start Upload / View Upload Button</b>	<p>The Start Upload button will display if the Provider Upload has an “In Progress” status. Selecting the “Start Upload” button will navigate the PCO to the document upload screen for the Provider Upload.</p> <p>The View Upload button will display in the Provider Upload has a “Ready for Review” or “Closed” status. Selecting the “View Upload” button will navigate the PCO to the Provider Upload Report.</p>

## USER NOTE





- Import Files uploaded before August 27, 2022 will not have a description or associated data source. The Provider Upload Name will be the name of the file uploaded to the system, including the file extension (see *Figure 96*).

**ExampleImportFile.xlsxm** Last Updated: 07/14/2022 09:51:15 AM Closed

Report ID: 277870 Created By: tx@example.com Data Source(s): No Data Source

**Results Summary**

6 Accepted 0 Rejected

[View Upload](#)

Figure 96: Provider Upload Summary Card for a File Upload before August 27, 2022

## 2.6.1A SEARCHING FOR PROVIDER UPLOADS

PCOs can filter the Provider Uploads in their state.

Provider Management > Provider Upload

**Provider Upload**

This page is designed to help you manage provider updates in bulk using system-generated Excel files.

[Generate Provider Import File](#)

1 Search Uploads 2 Filter by Status 3 Filter by Data Sources 4 Filter by Last Updated Date

Search by Upload Name Select Filter Select Data Sources Select Last Updated Date

Showing 1 to 10 of 161 entries

Figure 97: Provider Upload Search

### Feature

#### 1. Search Uploads

### Description

This field allows users to filter Provider Uploads by their name.

#### 2. Filter by Status

This field allows users to filter Provider Uploads by Status. Status selections include:

- In Progress
- Processing
- Canceled
- Ready for Review
- Closed

#### 3. Filter by Data Source

This field allows users to filter Provider Uploads by data source. The Data Source options will include all data sources that have been uploaded to the Provider Data Sources page.

#### 4. Filter by Last Updated Date

This field allows users to filter Provider Uploads by the date the Provider Uploads was last updated by the system. Users can search by a single date or by date ranges.





## 2.6.1B DELETING PROVIDER UPLOADS

PCOs can delete any Provider Upload with an “In-progress” status. Once a Provider Upload is deleted, PCOs will not be able to upload the associated import file to the system to make bulk uploads.

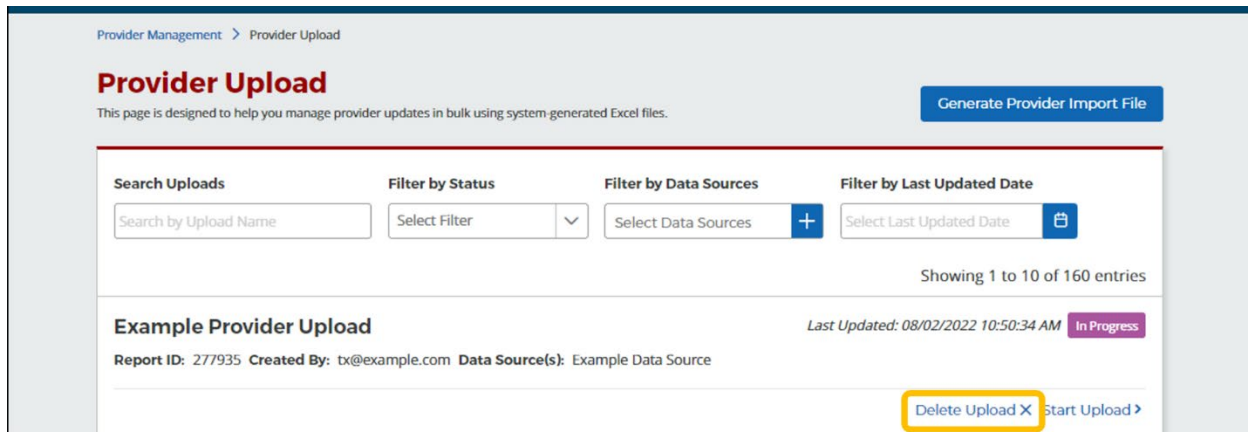


Figure 98: Deleting an In Progress Provider Upload

## INSTRUCTIONS

To delete an “In-progress” Provider Upload

1. Select the “Delete Upload” button to the right of the “Start Upload” button
2. Select the “Confirm” button in the pop-up modal
  - a. Selecting the “Cancel” button will close the pop-up modal and not delete the Provider Upload

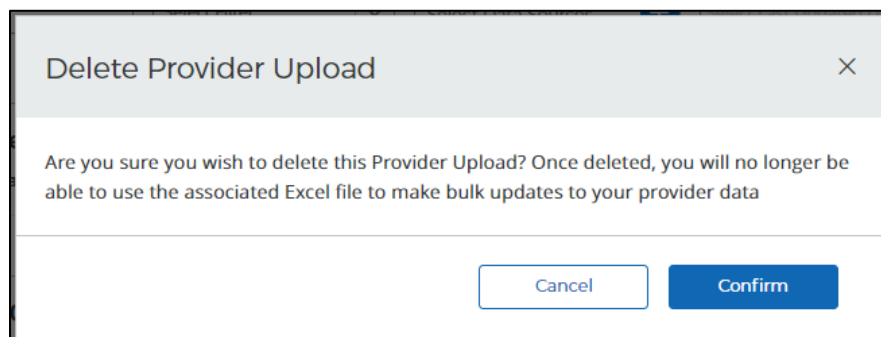


Figure 99: Delete Provider Upload Pop-up Modal

## 2.6.2 GENERATING PROVIDER IMPORT FILES

PCOs can start new Provider Uploads by generating import files through the Generate Import File modal. New import files can be created on the Provider Upload Landing Page or the Advanced Provider Search page.

### 2.6.2A GENERATING PROVIDER IMPORT FILES FROM THE PROVIDER UPLOAD LANDING PAGE





PCOs can create a new Provider Upload by selecting the “Generate Provider Import File” button in the top right corner of the Provider Upload Landing Page.

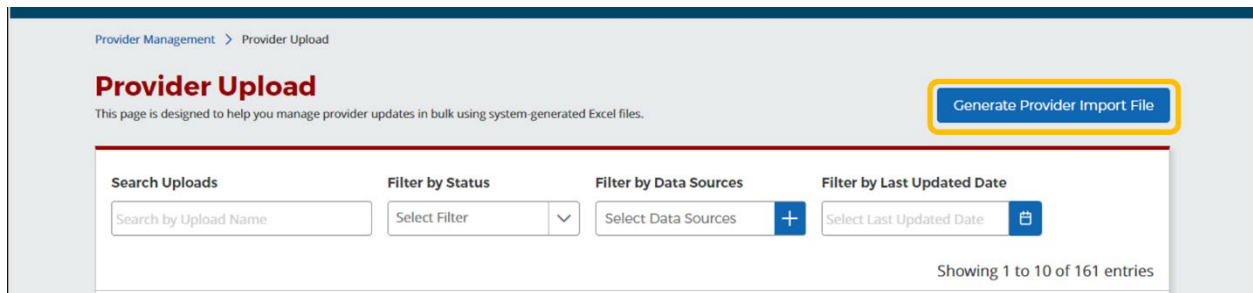


Figure 100: Generate Provider Import File Button on the Provider Upload Landing Page

## INSTRUCTIONS

To generate an import file on the Provider Upload Landing Page

1. Enter a name for the Provider Upload. This name will appear as the title of the card associated with this import file
2. Choose a filter for the Provider Upload.
  - a. Once a filter has been selected, a second dropdown will appear underneath the filter option to allow PCOs to select the values they would like to see in their file
  - b. To add an additional filter, select the “Add Filter” button in the bottom right corner of the modal
3. Select the “Continue” button

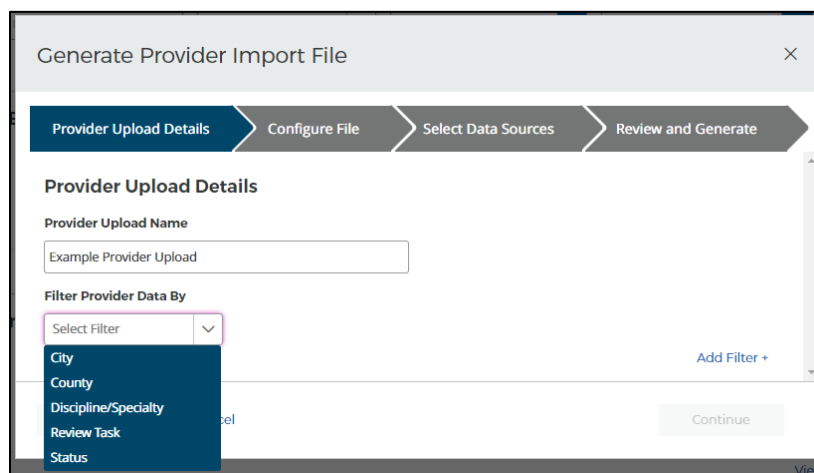


Figure 101: Generate Provider Import File Modal - Provider Upload Details Step

4. Add the editable columns that will be updated in this Provider Upload
  - a. The Reason Code column will always be pre-selected. PCOs can remove Reason Code from the import file by deselecting the checkbox next to the Reason Code option in the Editable Columns dropdown
5. Add any desired read-only columns to the import file
6. Select the “Continue” button





The screenshot shows a modal window titled "Generate Provider Import File" with a close button (X) in the top right corner. Below the title is a progress bar with four steps: "Provider Upload Details", "Configure File" (which is highlighted in blue), "Select Data Sources", and "Review and Generate". The main content area is titled "Configure File". It lists "Default Columns Included" as "Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, Postal Code". Below this, there are two sections: "Editable Columns" with a text input field containing "Reason Code" and a blue "+" button to its right; and "Additional Read Only Columns" with a text input field containing "Select Read-Only Columns" and a blue "+" button to its right. At the bottom of the modal are three buttons: "Back", "Cancel", and "Continue".

Figure 102: Generate Provider Import File Modal - Configure File Step

7. Select a data source for any editable columns chosen in the previous step
  - a. The data source drop down will be populated based on the Current data sources on the Provider Data Sources page
  - b. If no Data Source has been uploaded for that field, select the "No Data Source" option
  - c. If Phone Number, Fax Number, or Clinician Data Reviewed were selected as editable columns, no data source is required
8. Select the "Continue" button

The screenshot shows the same modal window, but now on the "Select Data Sources" step, which is highlighted in blue in the progress bar. The main content area is titled "Select Data Sources". It contains a table with two columns: "Column" and "Data Source". The "Column" column lists "Discipline", "Specialty", "Location Address", "Direct Tour Hours", and "Reason Code". The "Data Source" column contains dropdown menus for each. The "Discipline" dropdown is open, showing three options: "Select Data Source", "Example Data Source", and "No Data Source". At the bottom of the modal are three buttons: "Back", "Cancel", and "Continue".

Figure 103: Generate Provider Import File Modal - Select Data Sources Step





9. Review the information entered in the modal
10. Select the “Save and Generate” button

The screenshot shows a modal window titled "Generate Provider Import File" with a close button (X) in the top right corner. The modal has a progress bar at the top with four steps: "Provider Upload Details", "Configure File", "Select Data Sources", and "Review and Generate" (which is the active step, highlighted in blue). The main content area is titled "Review and Generate" and contains three sections:

- Provider Upload Details:**
  - Provider Upload Name: test
  - Filter Provider File By: Status
  - Status: Eligible
- Configure File:**
  - Default Columns: Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, Postal Code
  - Editable Columns: Discipline, Specialty, Location Address
  - Read-Only Columns: N/A
- Select Data Sources:**

Column	Data Source
Discipline	No Data Source
Specialty	Virginia Physician Licensee Data-Updated continuously
Location Address	No Data Source

At the bottom of the modal, there are three buttons: "Back", "Cancel", and "Save".

Figure 104: Generate Provider Import File Modal - Review and Generate Step

Once the “Save and Generate” button has been selected, the system will create a macro-enabled Excel file and add a new card for the created Provider Upload to the Provider Upload Landing Page. The Provider Upload will have an “In Progress” status.

The screenshot shows the "Provider Upload" landing page. At the top, there is a breadcrumb "Provider Management > Provider Upload" and a blue button "Generate Provider Import File". Below the breadcrumb is the heading "Provider Upload" and a subheading "This page is designed to help you manage provider updates in bulk using system-generated Excel files." Below this is a search and filter section with four filters: "Search Uploads" (with a search box), "Filter by Status" (with a dropdown menu), "Filter by Data Sources" (with a plus button), and "Filter by Last Updated Date" (with a calendar icon). Below the filters, it says "Showing 1 to 10 of 160 entries". The main content area shows an "Example Provider Upload" card. The card has a title "Example Provider Upload" and a status "In Progress" (in a purple box). Below the title, it says "Report ID: 277935 Created By: tx@example.com Data Source(s): Example Data Source". At the bottom of the card, there are two links: "Delete Upload X" and "Start Upload >".

Figure 105: In Progress Provider Upload on the Provider Upload Landing Page

Import files can contain the following columns (in order) and be populated with data for each location if the data exists for those records:





- |   |                                     |
|---|-------------------------------------|
| 1. Action                               | 37. Dental Auxiliaries              |
| 2. NPI                                  | 38. Direct Tour Hours               |
| 3. First Name                           | 39. Reason Code                     |
| 4. Middle Name                          | 40. Organizational NPI              |
| 5. Last Name                            | 41. Designation/Organization Name   |
| 6. Suffix                               | 42. Site Name                       |
| 7. Phone Number                         | 43. Designation ID                  |
| 8. Fax Number                           | 44. Organization Unique ID          |
| 9. Discipline                           | 45. Designation Status              |
| 10. Specialty                           | 46. Site Type                       |
| 11. Status                              | 47. Annual Medicaid Claims          |
| 12. Ineligible: CMS Deactivated         | 48. Medicaid Patient %              |
| 13. Ineligible: PCO Omitted             | 49. Homeless %                      |
| 14. Ineligible: Not Geocoded            | 50. Migrant Farmworkers %           |
| 15. Ineligible: Federal Provider        | 51. American Indian/Alaska Native % |
| 16. Ineligible: NHSC Provider           | 52. Sliding Fee %                   |
| 17. Ineligible: J1 Visa Waiver Holder   | 53. Migrant Seasonal Farmworker %   |
| 18. Ineligible: No Specialty/Discipline | 54. Intern or Resident?             |
| 19. Ineligible: New, Not Reviewed       | 55. J1 Visa Waiver Holder?          |
| 20. Provider Location ID                | 56. Federal Provider                |
| 21. Address Line 1                      | 57. NHSC Provider?                  |
| 22. Address Line 2                      | 58. Review Tasks                    |
| 23. City                                | 59. Clinician Data Reviewed         |
| 24. State                               | 60. Attestation Date                |
| 25. Postal Code                         | 61. Activation Date                 |
| 26. Display Address                     | 62. SDMS Last Modified Date         |
| 27. County Name                         | 63. SDMS Last Modified By           |
| 28. Latitude                            | 64. NPI Address Change Date         |
| 29. Longitude                           | 65. NPI Deactivation Date           |
| 30. Match Level                         | 66. NPI Reactivation Date           |
| 31. State FIPS                          | 67. NPI New Provider Date           |
| 32. County FIPS                         | 68. NPI Taxonomy Change Date        |
| 33. Census Tract                        | 69. Taxonomy Code                   |
| 34. CSD                                 | 70. Taxonomy Type                   |
| 35. ZCTA Public ID                      | 71. License Number                  |
| 36. Age                                 | 72. License State                   |

The spreadsheet must always contain the following columns:

- |              |                        |
|--------------|------------------------|
| • Action     | • Specialty            |
| • NPI        | • Provider Location ID |
| • First Name | • Address Line 1       |
| • Last Name  | • Address Line 2       |
| • Discipline | • City                 |





- State
- Postal Code

## USER NOTES

- If the file would contain more than 20,000 records, the system will not create the file. A card for the Upload will be generated, and the PCO will need to manually delete the Upload. For more information on deleting Provider Uploads, see *2.6.1B Deleting Provider Uploads*.
- Once a file has been generated, PCOs can include additional columns in their import files. Any user entered columns cannot have a column header that matches a header for any of the system generated column.
- If Taxonomy Code, Taxonomy Type, License Number, and License State are selected as read-only columns, PCOs can adjust how many of these columns appear in their downloaded import file (see *Figure 106*). PCOs can view up to 15 columns each to accommodate providers with multiple taxonomies and licenses.

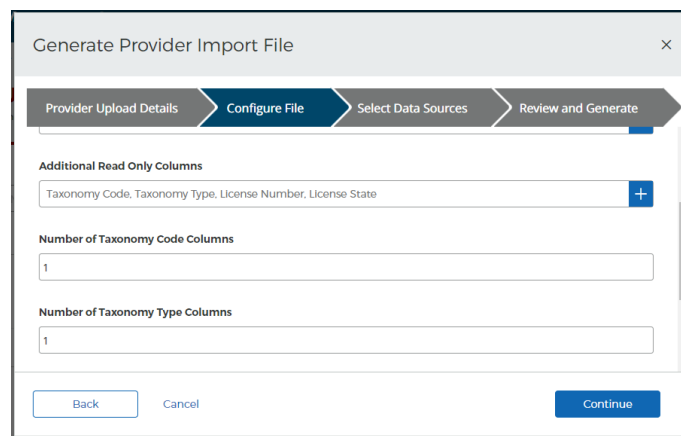


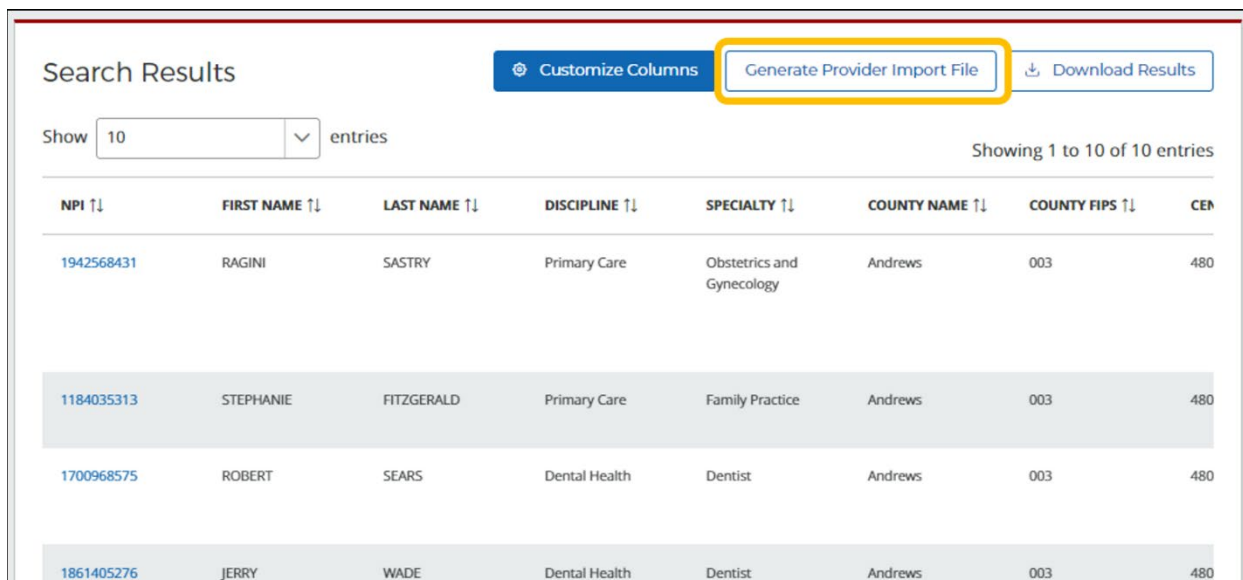
Figure 106: Adjusting Number of Taxonomy and License Related Columns when Generating an Import File

## 2.6.2B GENERATING PROVIDER IMPORT FILES FROM THE ADVANCED SEARCH

PCOs can create a new Provider Upload by selecting the “Generate Provider Import File” button in the top right corner of the Search Grid. The downloaded file will include the provider locations and columns displayed in the Search Grid. User can add and remove columns using the Customize Columns modal to adjust the columns that will appear in the file. For additional information on customizing the columns that appear in the Provider Search Grid, see *Section 2.2.3A Customizing the Search Grid*.







**Search Results** Customize Columns Generate Provider Import File Download Results

Show  entries Showing 1 to 10 of 10 entries

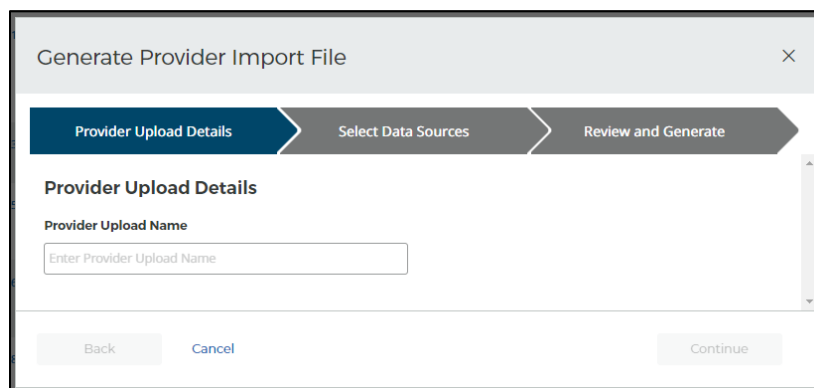
NPI ↑↓	FIRST NAME ↑↓	LAST NAME ↑↓	DISCIPLINE ↑↓	SPECIALTY ↑↓	COUNTY NAME ↑↓	COUNTY FIPS ↑↓	CEN
1942568431	RAGINI	SASTRY	Primary Care	Obstetrics and Gynecology	Andrews	003	480
1184035313	STEPHANIE	FITZGERALD	Primary Care	Family Practice	Andrews	003	480
1700968575	ROBERT	SEARS	Dental Health	Dentist	Andrews	003	480
1861405276	JERRY	WADE	Dental Health	Dentist	Andrews	003	480

Figure 107: Generating Provider Import Files from the Advanced Search

## INSTRUCTIONS

To generate an import file on the Provider Upload Landing Page

1. Select the Generate Provider Import File button in the top right corner of the Advanced Search Grid
2. Enter a name for the Provider Upload. This name will appear as the title of the card associated with this import file
3. Select the “Continue” button



**Generate Provider Import File** [X]

Provider Upload Details | Select Data Sources | Review and Generate

**Provider Upload Details**

Provider Upload Name

Back Cancel Continue

Figure 108: Generate Provider Import File Modal - Provider Upload Details Step

4. Select a data source for any editable columns displayed in the Search Grid
  - a. The data source drop down will be populated based on the Current data sources on the Provider Data Sources page
  - b. If no Data Source has been uploaded for that field, select the “No Data Source” option
  - c. If Phone Number, Fax Number, or Clinician Data Reviewed are displayed in the Search Grid, no data source is required
5. Select the “Continue” button





The screenshot shows a modal window titled "Generate Provider Import File" with a close button (X) in the top right corner. The modal has a progress bar at the top with three steps: "Provider Upload Details", "Select Data Sources" (which is the active step, highlighted in blue), and "Review and Generate". Below the progress bar, the "Select Data Sources" section contains five rows, each with a "Column" label and a "Data Source" dropdown menu. The columns are: Discipline, Specialty, Location Address, Direct Tour Hours, and Site Type. Each dropdown menu currently displays "Select Data Source". At the bottom of the modal, there are three buttons: "Back", "Cancel", and "Continue".

Figure 109: Generate Provider Import File Modal - Select Data Sources Step

6. Review the information entered in the modal
7. Select the "Save and Generate" button

The screenshot shows the same modal window, now at the "Review and Generate" step. The progress bar at the top shows four steps: "Provider Upload Details", "Configure File", "Select Data Sources", and "Review and Generate" (which is the active step, highlighted in blue). The "Review and Generate" section contains three sub-sections: "Provider Upload Details", "Configure File", and "Select Data Sources". The "Provider Upload Details" section shows "Provider Upload Name" as "test" and "Filter Provider File By Status" as "Status Eligible". The "Configure File" section shows "Default Columns" as "Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, Postal Code", "Editable Columns" as "Discipline, Specialty, Location Address", and "Read-Only Columns" as "N/A". The "Select Data Sources" section shows three rows: "Column Discipline" with "Data Source No Data Source", "Column Specialty" with "Data Source Virginia Physician Licensee Data-Updated continuously", and "Column Location Address" with "Data Source No Data Source". At the bottom of the modal, there are three buttons: "Back", "Cancel", and "Save".

Figure 110: Generate Provider Import File Modal - Review and Generate Step





Once the “Save and Generate” button has been selected, the system will create a macro-enabled Excel file and add a new card for the created Provider Upload to the Provider Upload Landing Page. The Provider Upload will have an “In Progress” status.

## USER NOTES

- If the file would contain more than 20,000 records, the system will not create the file. A card for the Upload will be generated, and the PCO will need to manually delete the Upload. For more information on deleting Provider Uploads, see *2.6.1B Deleting Provider Uploads*.

### 2.6.3 EDITING PROVIDER LOCATIONS USING THE IMPORT FILE

The generated import file will have all provider data for that state based on columns and criteria selected. The file will have a Provider Locations tab and a Metadata tab (see *Figure 111*). The Provider Locations tab can be edited to modify provider data through the Import Tool. The Metadata tab has a creation date that informs the system when the file was generated and the required Report ID. The Metadata tab also provides the Reason Code values and the Discipline, Specialty, and Site Type lists.

	A	B	C
1	<b>Action</b>	<b>NPI</b>	<b>First Name</b>
2		9397	JENNIFER
3		8664	MAUREEN
4		7245	JENNY
5		7628	TINA
6		5234	SUZANNA
7		1746	CLAY

Figure 111: Excel Import File tabs

The Provider Locations and Metadata tabs should not be relabeled or deleted, as they are needed for the system to properly recognize the file. Relabeling these tabs will cause the system to reject the file and display an error message in the Provider Upload Report. Users have the ability to add additional columns if required. The system will ignore all but the system-generated columns. Should any of the required system columns be modified or deleted, the system will reject the file, and no updates will be made to provider data.

The first time a file is opened, users may encounter one or both of the following firewall warnings (depending on the Excel version and firewall settings) as illustrated in *Figure 112* and *Figure 113*.

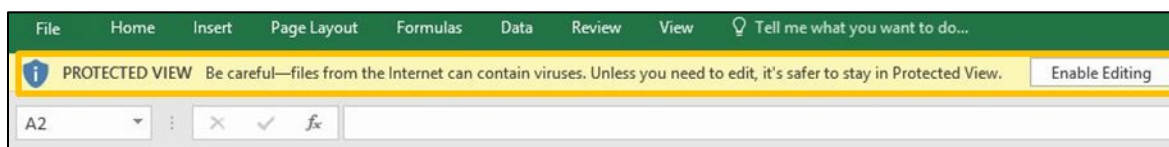


Figure 112: Enabling Editing Capability



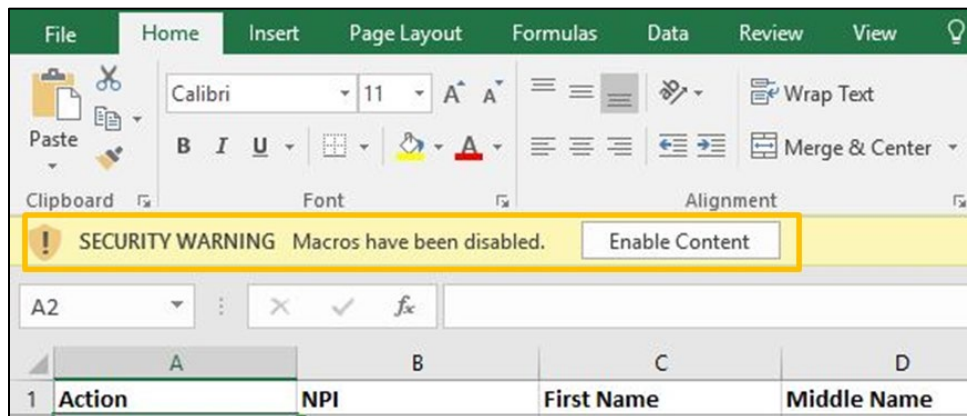
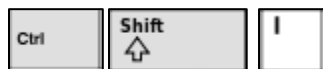


Figure 113: Enabling Macro Capability

To use the import file, users may need to click the “Enable Editing” and “Enable Content” buttons if prompted by Excel.

### 2.6.3A ACTIVATING THE BUILT-IN MACRO

In order for the system to know the action the user is attempting to make, the user will need to select one of the options (Add, Update or Omit) in the drop-down under the “Action” column. These options have been built into a macro in the import file to facilitate user’s ability to modify the data. The macro can be activated by pressing



(Ctrl + Shift + I) on the keyboard.

Activating the macro will populate the Action, Discipline, Specialty, Dental Auxiliaries, Reason Code, Facility Information, and Site Type columns’ options as illustrated in *Figure 114* and *Figure 115*. The system will only accept values from the provided options for all columns that were prepopulated by the macro. Entering any other value will cause the record to be rejected, and no updates will be made to that particular record.

The system will only consider records that have an action type selected. If the selected option in the drop-down is “Select”, the system will ignore that row’s record and move on to the next record without providing an error message or warning to the user. Users can change the formatting of the original file, add additional columns, or reorder the columns, and the system will still be able to process the file as long as the required columns are still present in the file.

	A	B	C	D	E	
1	Action	NPI	First Name	Middle Name	Last Name	S
2	Select	0 000472	EDGAR		FUENTES	
3	Select	0 000506	KEISHA	L.	BUTLER	
4	Add	0 000548	PHILIP		ARANDA	
5	Update	0 000654	CAROLINE	MARIE	RHODES	
6	Omit	0 000738	HELENE	A.	ZIMMALT	

Figure 114: Macro Populated Action Column





AI	AI	AK	AL	AM
Direct Tour Hours	Reason Code	Site Type	Annual Medicaid Claims	Medicaid Patient %
40			0	0.0
40	Deceased		0	0.0
40	Duplicate Entry		0	0.0
40	Faculty		0	0.0
40	Incorrect Profession		0	0.0
40	Inpatient Facility Only		0	0.0
40	License Suspended by State/In		0	0.0
40	Locum Tenens/PRN		0	0.0
40	Military Address		0	0.0
40			0	0.0

Figure 115: Macro Populated Reason Code

### 2.6.3B ADDING A NEW PROVIDER LOCATION

The Import Tool will allow users to add new locations for existing providers within SDMS by selecting the “Add” option from the drop-down under the Action column. There can only be one unique address with an “Eligible” status per provider. If a user attempts to add a new location with the exact same address as an existing location, the system will return an error message.

The user must provide the NPI for the provider that the location is being added to. The Import Tool will only accept NPIs already known to SDMS.

The system will accept the following information when the Add action is selected:

- Discipline
- Specialty
- Address Line 1
- Address Line 2
- City
- State
- Postal Code
- Dental Auxiliaries (If DH provider)
- Organizational NPI
- Direct Tour Hours
- Site Type
- Clinical Information (e.g., Annual Medicaid Claims)
- Employment Status (e.g., Intern or Resident)
- Clinician Data Reviewed

Any field where the PCO does not enter data will be set to the system default. For more information on which data fields on a provider location are set automatically by the system, see **Appendix A** – Editable Provider Data Fields.

## INSTRUCTIONS

To add a new location:

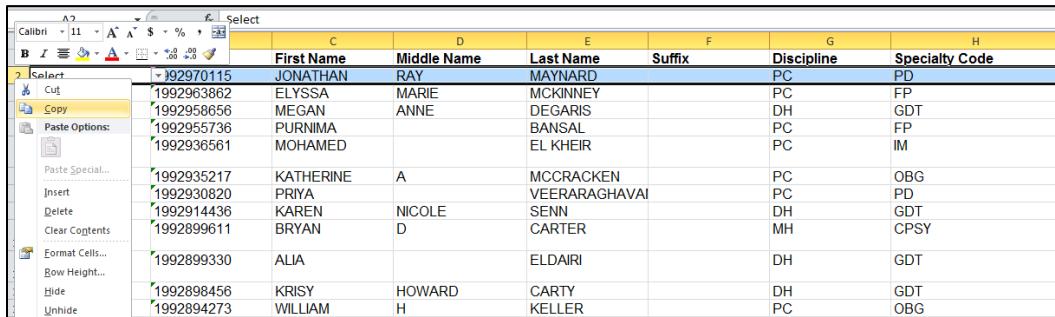
1. Copy an existing row, then right click and insert the copied row as a new row
2. Select ‘Add’ from the Action column





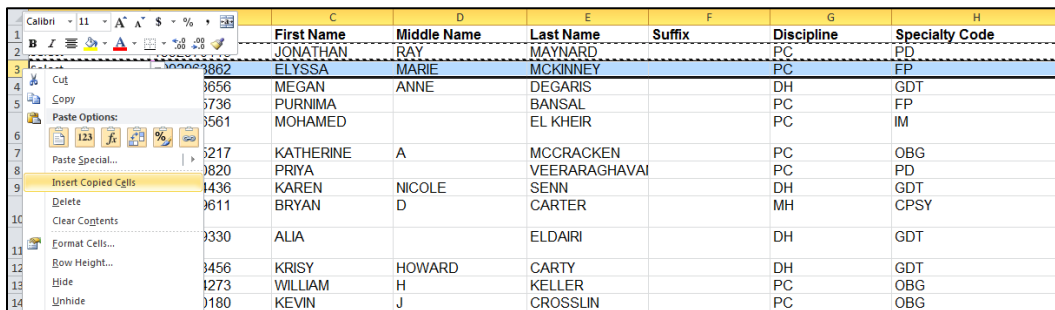
3. Enter new location's address information with at least all the required fields:
  - Address Line 1
  - Address Line 2 (column must be included but may be blank)
  - City
  - State (Must be within PCO's state)
  - Zip Code
  - Direct Tour Hours (Must be greater than zero)
4. Update any other necessary information. For more information on which other fields can be updated, see *Appendix A – Editable Provider Data Fields*
5. Save the file once all provider locations have been updated

The example below illustrates the process of adding a new location by copying and inserting an existing location.



		C	D	E	F	G	H
		First Name	Middle Name	Last Name	Suffix	Discipline	Specialty Code
1	Select	1992970115	JONATHAN	RAY	MAYNARD	PC	PD
2	Cut	1992963862	ELYSSA	MARIE	MCKINNEY	PC	FP
3	Copy	1992958656	MEGAN	ANNE	DEGARIS	DH	GDT
4	Paste Options:	1992955736	PURNIMA		BANSAL	PC	FP
5	Paste Special...	1992936561	MOHAMED		EL KHEIR	PC	IM
6	Insert	1992935217	KATHERINE	A	MCCRACKEN	PC	OBG
7	Delete	1992930820	PRIYA		VEERARAGHAVAI	PC	PD
8	Clear Contents	1992914436	KAREN	NICOLE	SENN	DH	GDT
9	Format Cells...	1992899611	BRYAN	D	CARTER	MH	CPSY
10	Row Height...	1992899330	ALIA		ELDAIRI	DH	GDT
11	Hide	1992898456	KRISY	HOWARD	CARTY	DH	GDT
12	Unhide	1992894273	WILLIAM	H	KELLER	PC	OBG

Figure 116: Adding Provider Locations - Copying Data



		C	D	E	F	G	H
		First Name	Middle Name	Last Name	Suffix	Discipline	Specialty Code
1	Select	1992970115	JONATHAN	RAY	MAYNARD	PC	PD
2	Cut	1992963862	ELYSSA	MARIE	MCKINNEY	PC	FP
3	Copy	1992958656	MEGAN	ANNE	DEGARIS	DH	GDT
4	Paste Options:	1992955736	PURNIMA		BANSAL	PC	FP
5	Paste Special...	1992936561	MOHAMED		EL KHEIR	PC	IM
6	Insert	1992935217	KATHERINE	A	MCCRACKEN	PC	OBG
7	Delete	1992930820	PRIYA		VEERARAGHAVAI	PC	PD
8	Clear Contents	1992914436	KAREN	NICOLE	SENN	DH	GDT
9	Format Cells...	1992899611	BRYAN	D	CARTER	MH	CPSY
10	Row Height...	1992899330	ALIA		ELDAIRI	DH	GDT
11	Hide	1992898456	KRISY	HOWARD	CARTY	DH	GDT
12	Unhide	1992894273	WILLIAM	H	KELLER	PC	OBG
13		1992894273	WILLIAM	H	KELLER	PC	OBG
14		1992894273	WILLIAM	H	KELLER	PC	OBG

Figure 117: Adding Provider Locations - Inserting Provider Data

	A	B	C	D	E	F	G
1	Action	NPI	First Name	Middle Name	Last Name	Suffix	Discipline
2	Select	1992970115	JONATHAN	RAY	MAYNARD		PC
3	Select	1992970115	JONATHAN	RAY	MAYNARD		PC
4	Select	3000902	JAIVANTI		LOHANO		PC
5	Update	3002502	CAROL	G	ADKINS		
6	Omit	3008095	ROBIN	R	HOUSE		

Figure 118: Adding Provider Locations - Selecting Add Action

	J	K	L	M	N	O	P	Q	R	S	T
1	Action	NPI	Address Line 1	Address Line 2	City	State	Postal Code	County Name	Age	Dental Auxiliaries	Direct Tour Hours
2	Select	1992970115	609 N. Carol Malone Blvd.	KDMC Specialty and Pedia	Grayson	KY	41143	Carter			20
3	Add	1992970115	123 Main St		Middlesboro	KY	40965				20

Figure 119: Adding Provider Location - Completed Cell





## USER NOTE

- Locations that are added using the import file are geocoded hourly. If PCOs navigate to a location immediately after the import tool is processed, the standardized address will not display. To geocode the location and populate the standardized address, PCOs can initiate a system geocode on the provider location.

### 2.6.3C UPDATING AN EXISTING PROVIDER LOCATION

The Import Tool will give users the ability to modify any eligible provider's location information in the PCO's state by selecting the "Update" option from the drop-down under the Action column. When attempting to update an existing location's information, the system will accept changes to information in the following columns:

- Discipline
- Specialty
- Match Level\*
- Dental Auxiliaries (If Dental Health provider)
- Organizational NPI
- Direct Tour Hours
- Reason Code (Remove reason code to un-omit location)
- Site Type
- Clinical Information (e.g. Annual Medicaid Claims)
- Employment Status (e.g., Intern or Resident)
- Clinician Data Reviewed (Attesting to a provider location)

*\*Ineligible Locations with geocoded match levels greater than 3 or no match level will be automatically re-geocoded with the "Update" action. No additional action is required by the user to initiate re-geocoding.*

When attempting to update provider locations using the Import Tool, NPI and Address information must match the system's records 100% with the following fields:

- NPI
- Provider Location ID

The system will reject the attempted updated and return an error message if the required fields listed above do not match a provider location in the system.

## INSTRUCTIONS

To update an existing provider location:

1. Select 'Update' from the Action column
2. Update all the necessary information.
3. Make sure all rules have been followed as described in *Appendix A – Editable Provider Data Fields*.
4. Save the file once all provider locations have been update.

The example below illustrates the process of updating Direct Tour Hours and Serves at Correctional Facility.





	A	B	C	D	E	F	G
1	Action	NPI	First Name	Middle Name	Last Name	Suffix	Discipline
2	Select	1992970115	JONATHAN	RAY	MAYNARD		PC
3	Add	1992970115	JONATHAN	RAY	MAYNARD		PC
4	Select	103000902	JAIVANTI		LOHANO		PC
	Select	3002502	CAROL	G	ADKINS		
	Add	3008095	ROBIN	R	HOUSE		
	Update	3008996	MELISSA		OMOHUNDRO		
	Omit						

Figure 120: Updating an Existing Provider Location - Selecting Update Action

AI	AJ	AK	AL	AM	AN
Direct Tour Hours	Reason Code	Site Type	Annual Medicaid Claims	Medicaid Patient %	Health Status
40				0.0	0.0
40				0.0	0.0
40				0.0	0.0
40	Non-Fed Not Licensed			0.0	0.0
40				0.0	0.0
40				0.0	0.0
40				0.0	0.0
40				0.0	0.0
40				0.0	0.0

Figure 121: Updating an Existing Provider Location - Changing Additional Information

## USER NOTES

- Address Line fields (Address Line 1, Address Line 2, City, State, Zip Code) cannot be changed for existing locations. If the address line fields need to be updated, a new location should be added and the existing location should be omitted.
- The system will return an error if a user updates a record with a populated Reason Code. If a user wishes to update an ineligible provider, the reason code must be removed for the update to be processed.
- The system will ignore user-entered latitude and longitudes in the import file. Provider locations with a match level greater than 4 will automatically be re-geocoded when using the update action.

## 2.6.3D OMITTING AN EXISTING PROVIDER LOCATION

The Import Tool allows users to omit provider locations in the PCO's state by selecting the "Omit" option from the drop-down under the Action column and selecting an option under the Reason Code column. A reason code must be selected, or the system will reject the omit attempt.

When attempting to omit provider locations using the Import Tool, NPI and Address information must match the system's records 100% with the following fields:

- NPI
- Provider Location ID

The system will reject the attempted omit and return an error message if the required fields listed above do not match a provider location in the system.

## INSTRUCTIONS

To omit an existing provider location:

- Select 'Omit' from the Action column





2. Select an option from the 'Reason Code' column
3. Save the file once all provider locations have been updated

For more information about possible reason codes, see **Appendix C – Ineligible Reasons and PCO Omitted Reasons**.

The example below illustrates the process of omitting an existing location.

	A	B	C	D	E	F	G
1	Action	NPI	First Name	Middle Name	Last Name	Suffix	Discipline
2	Select	1992970115	JONATHAN	RAY	MAYNARD		PC
3	Add	1992970115	JONATHAN	RAY	MAYNARD		PC
4	Update	1003000902	JAIVANTI		LOHANO		PC
5	Select	3003002502	CAROL	G	ADKINS		
	Select	3008095	ROBIN	R	HOUSE		
	Add	3008996	MELISSA		OMOHUNDRO		
	Update	3009036	JENNILLE		ZABIEREK		
	Omit						

Figure 122: Omitting Provider Location - Selecting Omit Action

AI	AJ	AK	AL	AM
Direct Tour Hours	Reason Code	Site Type	Annual Medicaid Claims	Medicaid Patient %
40			0	0.0
40	Deceased		0	0.0
40	Duplicate Entry		0	0.0
40	Faculty		0	0.0
40	Incorrect Profession		0	0.0
40	Inpatient Facility Only		0	0.0
40	License Suspended by State/In		0	0.0
40	Locum Tenens/PRN		0	0.0
40	Military Address		0	0.0
40			0	0.0
40			0	0.0

Figure 123: Omitting Provider Location - Omit Reason Code

## 2.6.4 IMPORTING PROVIDER DATA IN BULK

PCOs can upload an import file to its corresponding Provider Upload by selecting the “Start Upload” button in the bottom right corner of the Provider Upload card on the Provider Upload Landing Page. To successfully upload an import file to the system, the Report ID in the metadata tab and the Report ID for the Provider Upload must match.





Figure 124: Starting a Provider Upload from the Provider Upload Landing Page

## INSTRUCTIONS

To upload an import file:

1. Select the “Start Upload” button for the desired Provider Upload
2. Select the “Select or Drop File Here” button
  - a. Users may also drag and drop their chosen file into the Upload File box

Figure 125: Uploading a File to a Provider Upload

3. Choose the file with the matching Report ID in one of the following formats: xlsm, .xlsx, .zip. Users will not be able to upload a file in a different file format
4. Enter a description of the chosen file (Optional)
5. Select the “Upload” button
  - a. If the wrong file is accidentally chosen, select the “Cancel” button and restart the document upload process





Provider Management > Provider Upload > Provider Upload Report

### Example Provider Upload

Last Updated: 08/02/2022 10:50:34 AM In Progress

Report ID: 277935 Created By: tx@example.com Data Source(s): Example Data Source

#### Upload Provider File

Please click on the browse button to upload a file with your state providers. Your file must contain one of the following extensions: .xslm, .xlsx, .zip

Example File.xslm 26.06kb

Description (Optional)  
Enter text here

Upload Cancel

Figure 126: Entering a Document Description for a Provider Upload

## USER NOTES

- Files must be smaller than 50 mb
- If multiple files are included in a single .zip file, the system will only process the first file.



Figure 127: Uploading a File that is Greater Than 50 MB on the Provider Upload Page

Once a file has been uploaded, the system will navigate the user back to the Provider Upload Landing Page. The Provider Upload will now have a status of “Processing.” If a large file is uploaded, the file may remain in “Processing” for several minutes. Once the system finishes processing the import file, the status of the Provider Upload will change to “Ready for Review.” PCOs will need to refresh the page to see the latest status of the Provider Upload.

Provider Management > Provider Upload

## Provider Upload

This page is designed to help you manage provider updates in bulk using system-generated Excel files.

Generate Provider Import File

Search Uploads Filter by Status Filter by Data Sources Filter by Last Updated Date

Search by Upload Name Select Filter Select Data Sources Select Last Updated Date

Showing 1 to 10 of 160 entries

### Example Provider Upload

Report ID: 277935 Created By: tx@example.com Data Source(s): Example Data Source

Example Document Description

Last Updated: 08/02/2022 11:07:59 AM Processing

Figure 128: Provider Upload with a Processing Status





## 2.6.4A RETRYING PROVIDER UPLOADS

Before processing changes to provider locations in an import file, the system will check to ensure the file is compatible. It will not process any changes if it encounters one of the following issues:

- The metadata tab has been deleted or modified.
- One of the required columns has been deleted.
- No values were entered in the Actions column.
- An identical file has been uploaded.

If the system encounters any of the aforementioned criteria, the Provider Upload will be given a “Canceled” status. When PCOs view the Provider Upload Report, they will see an error message letting them know what issue the system encountered.

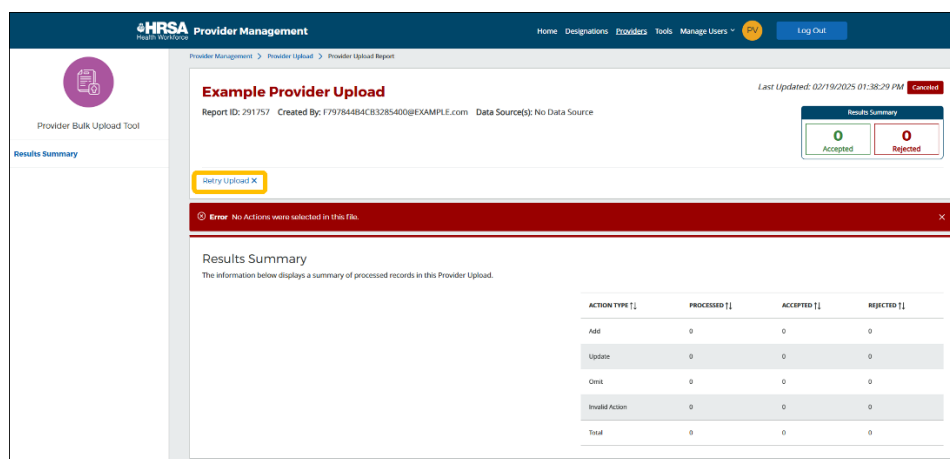


Figure 129: Retrying a Provider Upload

## INSTRUCTIONS

To retry a Provider Upload

1. Navigate to the Provider Upload Report for the affected Provider Upload
2. Select the “Retry Upload” button in the bottom left of the Provider Upload Report Header Card

Once a Provider Upload is cancelled, it will be given an “In-progress” status, and PCOs will be able to upload a corrected version of their import file to the system.

## USER NOTES

- If a file with one of the aforementioned issues was uploaded to the system prior to August 27, 2022, PCOs will not be able to retry the Provider Upload.

## 2.6.5 VALIDATING PROVIDER UPLOADS

Once the system has finished processing an import file, PCOs will be able to review the uploaded data before any changes are made to the provider data used in the designation process. The Provider Upload will receive a “Ready for Review” status, and PCOs can access the Upload Review by selecting the “Review Upload” button.





**HRSA Provider Management**

Home Designations Providers Tools Manage Users Log Out

Provider Management > Provider Upload

**Provider Upload**  
This page is designed to help you manage provider updates in bulk using system-generated Excel files.

Generate Provider Import File

Search Uploads: Search by Upload Name

Filter by Status: Select Filter

Filter by Data Sources: Select Data Sources

Filter by Last Updated Date: Select Last Updated Date

Showing 1 to 10 of 438 entries

**Example Provider Upload**  
Report ID: 292129 Created By: va@example1.com Data Source(s): No Data Source

Last Updated: 04/30/2025 01:52:42 PM Ready for Review

**Results Summary**  
97 Pending Review 2 Rejected

Review Upload

**Figure 130: Provider Upload with a Ready for Review status**

When the PCO selects “Review Upload,” they will be navigated to the Provider Upload Review page to preview the rejected and accepted updates before the data is reflected across the Provider Management portal or available to use in designation applications.

**HRSA Provider Management**

Home Designations Providers Tools Manage Users Log Out

Provider Management > Provider Upload > Review Upload

**Example Provider Upload**  
Report ID: 292130 Created By: tx@example1.com Data Source(s): Example Data Source

Last Updated: 04/30/2025 02:37:01 PM Ready for Review

**Results Summary**  
12 Pending Review 8 Rejected

Cancel Upload X

Review Rejected Results Accepted Results Summary Finalize Upload

**Review Rejected Results**  
Review the table below for location updates that were rejected. Click “Generate New Import File” to create a new file to correct and reupload.

Generate New Import File

ERROR [1]	TOTAL LOCATIONS [1]
Both Discipline and Specialty should contain a value	2
Direct Total Hours greater than 168	2
Reason code is blank	4

Continue

**Figure 131: Provider Upload Review**

## USER NOTES

- Locations that are included in a cannot be edited. PCOs will view a banner on the provider location informing them the location is included in a Provider Upload, and all Edit buttons will be removed from the provider location (see *Figure 131*). After a Provider Upload is accepted or canceled, PCOs will be able to edit those locations again.





Provider Management > Provider Search > Provider Profile > Provider Location

**5600 Fischers Lane, Rockville, MD 20857 (Provider Location ID: 00000000)** View Supporting Details

Last updated by ADMIN on 11/20/2021 at 3:30 PM

This location is included in a Provider Upload that is ready for review and cannot be edited until the Provider Upload is accepted or canceled.

**Location Information**

Status Ineligible	Ineligible Reason(s) PCO Omitted	PCO Omitted? Specialist/Subspecialist	SDMS Activation Date 03/26/2016	Phone Number —	Fax Number —
----------------------	-------------------------------------	--	------------------------------------	-------------------	-----------------

**Site Association**

Organizational NPI N/A	Designation/Organization Name —	Site Name —	Designation ID —
---------------------------	------------------------------------	----------------	---------------------

Figure 132: Provider Location included in a Ready for Review Provider Upload

## 2.6.5A REVIEWING REJECTED RECORDS

PCOs can see a summary of the records the system was unable to process in the uploaded import file.

Review Rejected Results

Review the table below for location updates that were rejected. Click "Generate New Import File" to create a new file to correct and reupload.

Generate New Import File

ERROR	TOTAL LOCATIONS
> Both Discipline and Specialty should contain a value	2
< Direct Tour Hours greater than 168	2

NPI	LOCATION ADDRESS	PROVIDER NAME	IMPACTED FIELD	ENTERED VALUE	ROW NUMBER
1660950332	22400 FM 1954, HOLLIDAY, TEXAS, 763663914	RACHEL GOODMAN	Direct Tour Hours	200	12
1346880044	202 MCDONA, ARCHER CITY, TEXAS, 76351	JENNIFER SKINNER	Direct Tour Hours	200	13
> Reason code is blank	4				

Figure 133: Review Rejected Results during Provider Upload Review

### Feature

#### 1. Error Message

### Description

This field shows the error that caused the system to reject the change to the provider location. PCOs can expand the error message to see additional details about the impacted provider locations.

#### 2. NPI

This column shows the NPI for the processed provider location.

#### 3. Location Address

This column shows the address for the processed provider location.

#### 4. Provider Name

This column shows the name of the provider for the processed provider location.





## Feature

### 5. Impacted Field

## Description

This column shows the data fields that were changed for the processed provider location. If multiple columns are changed for a provider location, they will appear in a single list, separated by commas.

### 6. Entered Value

This column shows the value that was entered in the Impacted Fields.

### 7. Row Number

This column shows the row number for the processed provider location in the uploaded import file.

## GENERATING A NEW IMPORT FILE FROM REJECTED RECORDS

PCOs can create new Provider Uploads from their rejected records. The new import file will include all the rejected records from the original Provider Upload across Actions.

To generate an import file from rejected records

1. Select the “Generate New Import File” button
2. Enter a name for the Provider Upload. This name will appear as the title of the card associated with this import file
3. Select the “Continue” button

Figure 134: Generate Provider Import File Modal - Provider Upload Details Step

4. Add the editable columns that will be updated in this Provider Upload. The selected columns do not need to match the columns included in the original import file
  - a. The Reason Code column will always be pre-selected. PCOs can remove Reason Code from the import file by deselecting the checkbox next to the Reason Code option in the Editable Columns dropdown
5. Add any desired read-only columns to the import file
6. Select the “Continue” button



Generate Provider Import File

Provider Upload Details Configure File Select Data Sources Review and Generate

**Configure File**

**Default Columns Included**  
Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, Postal Code

**Editable Columns**  
Reason Code +

**Additional Read Only Columns**  
Select Read-Only Columns +

Back Cancel Continue

Figure 135: Generate Provider Import File Modal - Configure File Step

7. Select a data source for any editable columns chosen in the previous step
  - a. The data source drop down will be populated based on the Current data sources on the Provider Data Sources page
  - b. If no Data Source has been uploaded for that field, select the “No Data Source” option
  - c. If Phone Number, Fax Number, or Clinician Data Reviewed were selected as editable columns, no data source is required
  - d. If a data source was chosen for the original import file, the Data Source dropdown will be prepopulated by the system
8. Select the “Continue” button





The screenshot shows the 'Generate Provider Import File' modal with the 'Select Data Sources' step active. The modal has a progress bar at the top with four steps: 'Provider Upload Details', 'Configure File', 'Select Data Sources' (highlighted), and 'Review and Generate'. Below the progress bar, the 'Select Data Sources' section contains five rows, each with a 'Column' and a 'Data Source' dropdown menu. The columns are 'Discipline', 'Specialty', 'Location Address', 'Direct Tour Hours', and 'Reason Code'. The first four dropdowns are set to 'Example Data Source', and the last one is set to 'Select Data Source'. At the bottom, there are 'Back', 'Cancel', and 'Continue' buttons.

Column	Data Source
Discipline	Example Data Source
Specialty	Example Data Source
Location Address	Example Data Source
Direct Tour Hours	Example Data Source
Reason Code	Select Data Source

Figure 136: Generate Provider Import File Modal - Select Data Sources Step

9. Review the information entered in the modal
10. Select the "Save and Generate" button

The screenshot shows the 'Generate Provider Import File' modal with the 'Review and Generate' step active. The modal has a progress bar at the top with four steps: 'Provider Upload Details', 'Configure File', 'Select Data Sources', and 'Review and Generate' (highlighted). Below the progress bar, the 'Review and Generate' section contains three sub-sections: 'Provider Upload Details', 'Configure File', and 'Select Data Sources'. The 'Provider Upload Details' section shows 'Provider Upload Name' as 'test' and 'Filter Provider File By Status' as 'Status' with a 'Status Eligible' button. The 'Configure File' section shows 'Default Columns' as 'Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, Postal Code', 'Editable Columns' as 'Discipline, Specialty, Location Address', and 'Read-Only Columns' as 'N/A'. The 'Select Data Sources' section shows three rows with 'Column' and 'Data Source' columns. The first row is 'Discipline' with 'No Data Source', the second is 'Specialty' with 'Virginia Physician Licensee Data-Updated continuously', and the third is 'Location Address' with 'No Data Source'. At the bottom, there are 'Back', 'Cancel', and 'Save' buttons.

Column	Data Source
Discipline	No Data Source
Specialty	Virginia Physician Licensee Data-Updated continuously
Location Address	No Data Source

Figure 137: Generate Provider Import File Modal - Review and Generate Step





Once the “Save and Generate” button has been selected, the system will create a macro-enabled Excel file and add a new card for the created Provider Upload to the Provider Upload Landing Page. The Provider Upload will have an “In Progress” status. PCOs can use this new card to upload their macro-enabled Excel file to the system for processing.

## USER NOTE

- PCOs will not be able to download the rejected records for the “Add” action.
- If Taxonomy Code, Taxonomy Type, License Number, and License State are selected as read-only columns, PCOs can adjust how many of these columns appear in their downloaded import file. PCOs can view up to 15 columns each to accommodate providers with multiple taxonomies and licenses.

## 2.6.5B REVIEWING ACCEPTED RECORDS

PCOs can view a summary of the accepted changes in their import file. PCOs can see the number of locations that were added, updated, or omitted in their import file. If the action was included in an import file, PCOs can see the number of locations that were updated for each column in the import file. These accepted changes will not be accepted in the system until the PCO accepts the Provider Upload on the Finalize Upload step.

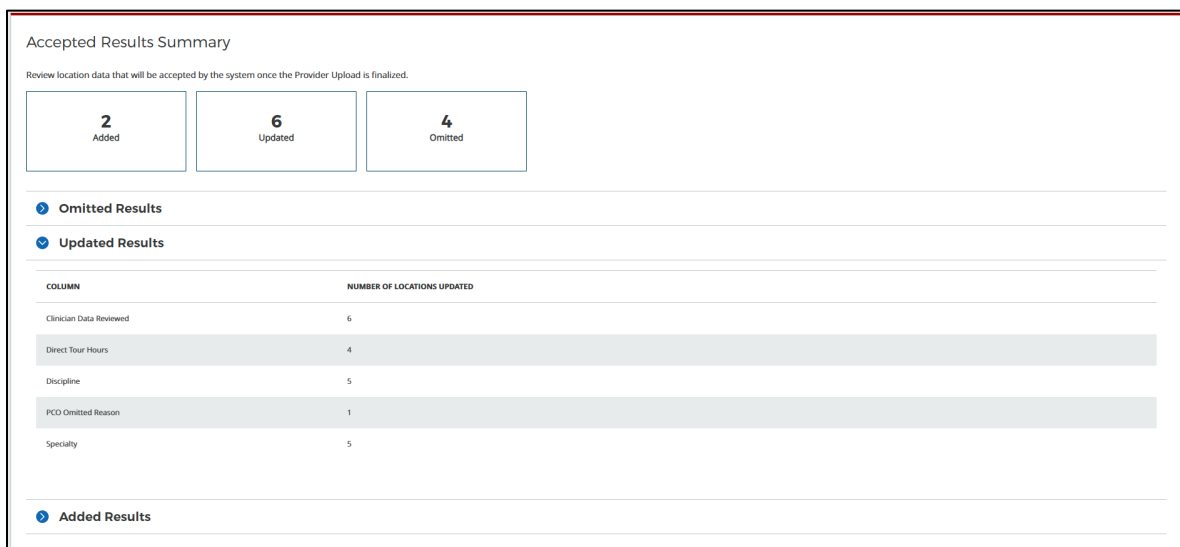


Figure 138: Review Accepted Results during Provider Upload Review

## 2.6.5C FINALIZING A PROVIDER UPLOAD

Once a PCO has completed the review of their Provider Upload, they can accept or cancel the Provider Upload.





**Example Provider Upload** Last Updated: 04/30/2025 02:37:01 PM Ready for Review

Report ID: 292130 Created By: tx@example1.com Data Source(s): Example Data Source

Results Summary	
<b>12</b> Pending Review	<b>8</b> Rejected

[Cancel Upload X](#)

Review Rejected ResultsAccepted Results SummaryFinalize Upload

**Finalize Upload**

Once you accept this upload, the data will be updated in the system. To accept and finalize this upload, click 'Accept Upload.' To cancel this upload, click 'Cancel Upload' and no data will be updated in the system.

Cancel UploadAccept Upload

Back

Figure 139: Finalize Upload during Provider Upload Review

## ACCEPTING PROVIDER UPLOADS

PCOs can accept the Provider Upload by selecting the “Accept” button on the Finalize Upload step of a Provider Upload Review. Once a Provider Upload is accepted, the PCO will be navigated back to the Provider Upload Landing Page.

After a Provider Upload is accepted by the PCO, the Provider Upload will receive a “Closed” status. The data included in the accepted Provider Upload will be reflected across the Provider Management Portal and will be used in future designation updates. PCOs will be able to edit the provider locations included in the import file through the Search Grid and on the individual locations.

## CANCELING PROVIDER UPLOADS

If the PCO does not want the data included in the uploaded file to be used for designation purposes, they can cancel the Provider Upload. Provider Uploads can also be canceled at any time during the review process by selecting the “Cancel Upload” button in the header card.

## INSTRUCTIONS

To cancel a Provider Upload:

1. Select the Cancel Upload button on the Finalize Upload step or from the header card
2. Confirm the upload should be canceled in the pop-up modal (see *Figure 138*)

### Cancel Upload

×

Are you sure you want to cancel this upload? No data will be updated in the system, and you will be taken back to the Provider Upload Landing Page where you can restart your upload.

Yes, Cancel this UploadGo Back





Figure 140: Cancel Upload Pop Up Modal

Once the Provider Upload is canceled, the system will give the Upload an “In Progress” status, and the PCO can either make corrections to their import file and re-upload or delete the Provider Upload. For more information on updating data in an import file, see *Section 2.6.3 Editing Provider Locations Using the Import File*. For more information on deleting Provider Uploads, see *Section 2.6.1B Deleting Provider Uploads*.

## 2.6.6 VIEWING PROVIDER UPLOAD REPORTS

Once the PCO has accepted the Provider Upload, the user can review the information about their processed import files and take additional action on the Provider Upload Report. Provider Upload Reports can be accessed by selecting the “View Upload” button on Provider Uploads with a “Closed” status.

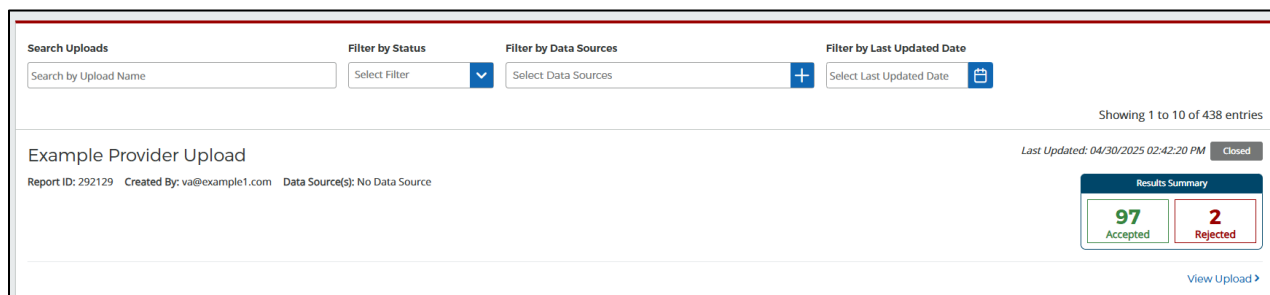


Figure 141: Provider Upload with a Closed Status

PCOs can view additional details about the accepted and rejected records in the processed import file in the Provider Upload Report.

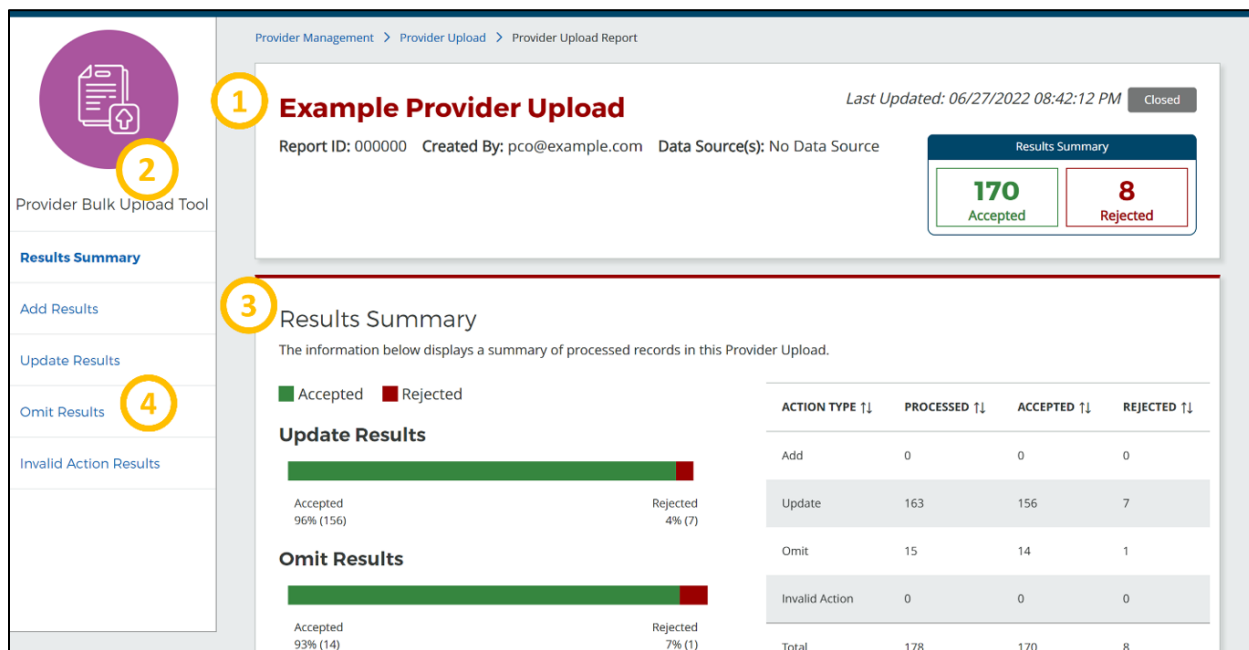


Figure 142: Provider Upload Report





## Feature

### 1. Provider Upload Report Header Card

## Description

This section shows summary information about the Provider Upload. Summary information includes:

- Provider Upload Name
- Report ID
- Created By User
- Data Sources
- Last Updated By
- Status
- Results Visual Summary

This section matches the information shown on the Provider Upload Summary card on the Provider Upload Landing Page.

### 2. Left-Hand Navigation

The Left-Hand Navigation allows PCOs to move between the Results Summaries for the different actions in their Provider Upload. Actions include:

- Results Summary
- Add
- Update
- Omit
- Invalid Action

### 3. Results Summary

This section shows a summary of the processed, accepted, and rejected records in the import file across the different potential actions.

### 3. Action Results

These sections show information about the Accepted and Rejected Records for each Action in the processed import file.

## 2.6.6A VIEWING THE RESULTS SUMMARY

When PCOs navigate to a Provider Upload Report, they will be directed to the overall Results Summary for the uploaded import file. On the Results Summary tab, PCOs can view the number of records that were processed, accepted, and rejected in the Provider Upload.

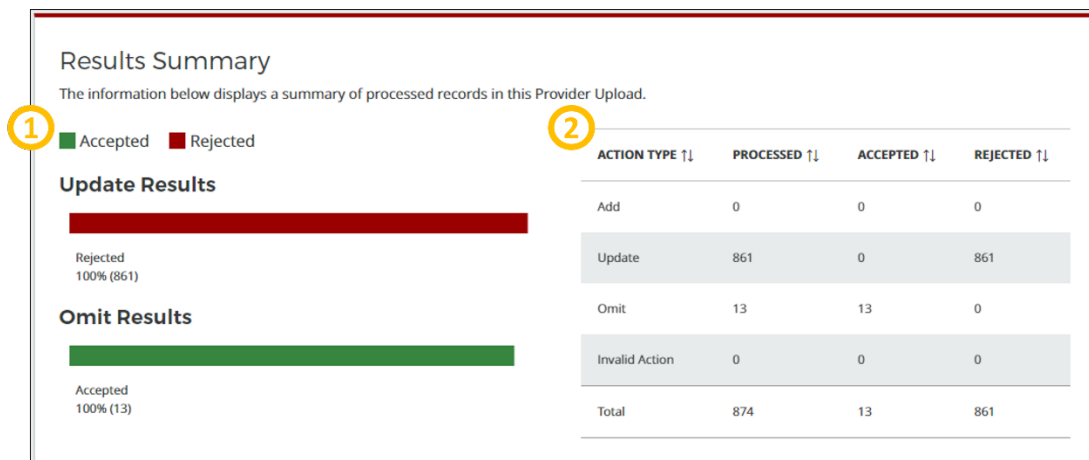


Figure 143: Results Summary





## Feature

### 1. Results Summary Bar Graph

## Description

This section shows a visualization of how many records were accepted and rejected for each Action included in an import file as percentages.

A bar will only appear for Actions that were included in the uploaded import file. If any provider locations have an invalid action in the Action columns, a bar will not appear for the Invalid Results Summary.

### 2. Results Summary Table

This section shows the number of processed, accepted, and rejected records in the import file. All the Actions will appear in the table regardless of which Actions were included in the import file.

## 2.6.6B VIEWING ACTION-SPECIFIC RESULTS

PCOs can view more details about their accepted and rejected records by selecting an Action Specific Results tab in the left-hand navigation. On an Action Specific Results tab, PCOs can view information about accepted and rejected records for each action and download rejected records in a new import file. If the PCO did not select one of the Actions in their import file, the action will not be listed in the left-hand navigation.

## VIEWING ACCEPTED RECORDS

PCOs can see a summary of the records the system successfully processed for each particular action in the Accepted Records table.

Update Results Summary				
Accepted Updates				
Showing 1 to 6 of 6 entries				
1 NPI	2 LOCATION ADDRESS	3 PROVIDER NAME	4 UPDATED COLUMNS	5 ROW NUMBER
1174027155	11321 RICHMOND AVE STE M101, HOUSTON, TEXAS, 770825545	MOTOLANI AJBOSE	Direct Tour Hours	11
1659878585	138 KNIPP RD, HOUSTON, TEXAS, 770247140	KATHRYN JONES	Direct Tour Hours	12
1275112435	1002 AVENUE A, KATY, TEXAS, 774932462	JENNIFER VASSILAS	Direct Tour Hours	13
1639768393	1707 FM 1960 BYPASS RD E STE D, HUMBLE, TEXAS, 773383955	SHANI DANIELS VAN PATTEN	Direct Tour Hours	14
1881241222	15511 TUCKERTON RD APT 911, HOUSTON, TEXAS, 770955318	ASHLY KOWALSKI	Direct Tour Hours	15
1801425996	14435 CABOT LODGE LN, CYPRESS, TEXAS, 774294321	AMORETTE EMBREY	Direct Tour Hours	16

Figure 144: Accepted Updates in the Results Summary

## Feature

### 1. NPI

## Description

This column shows the NPI for the processed provider location.

### 2. Location Address

This column shows the address for the processed provider location.





**Feature****3. Provider Name****Description**

This column shows the name of the provider for the processed provider location.

**4. Updated Columns**

This column shows the data fields that were changed for the processed provider location. If multiple columns are changed for a provider location, they will appear in a single list, separated by commas.

**5. Row Number**

This column shows the row number for the processed provider location in the uploaded import file.

**USER NOTES**

- If a file was uploaded prior to August 27, 2022, the Accepted Update section will not appear in the Provider Upload Report.
- The Invalid Action Summary will not have an Accepted Updates Section.

**VIEWING REJECTED UPDATES**

PCOs can see a summary of the records the system was unable to process for each particular action in the Accepted Records table.

Rejected Updates							
ERROR				TOTAL LOCATIONS			
Reason code is blank				3			
	NPI	LOCATION ADDRESS	PROVIDER NAME	IMPACTED FIELD	ENTERED VALUE	ROW NUMBER	
<input type="checkbox"/>	1427712496	637 W 20TH ST, HOUSTON, TEXAS, 770083617	MICAELA CANALES	Action, Reason Code	Omit, ""	27	
<input type="checkbox"/>	1073248837	5620 FM 1960 RD W, HOUSTON, TEXAS, 7706942	VERONICA ROJAS	Action, Reason Code	Omit, ""	28	
<input type="checkbox"/>	1972237790	3131 EASTSIDE ST STE 415, HOUSTON, TEXAS, 770083617	JOSEPH HARTSOE	Action, Reason Code	Omit, ""	29	

☐ Select All Rejected Records

Figure 145: Rejected Updates in the Update Results Summary

**Feature****1. View Error Report****Description**

Selecting this button will download an Excel report with the listed error message and impacted row number.

**2. Error Message**

This field shows the error that caused the system to reject the change to the provider location. PCOs can expand the error message to see additional details about the impacted provider locations.

**3. NPI**

This column shows the NPI for the processed provider location.





## Feature

### 4. Location Address

## Description

This column shows the address for the processed provider location.

### 5. Provider Name

This column shows the name of the provider for the processed provider location.

### 6. Impacted Field

This column shows the data fields that were changed for the processed provider location. If multiple columns are changed for a provider location, they will appear in a single list, separated by commas.

### 7. Entered Value

This column shows the value that was entered in the Impacted Fields.

### 8. Row Number

This column shows the row number for the processed provider location in the uploaded import file.

## USER NOTES

- Results will only appear in the Invalid Actions section if a PCO entered a value other than “Add,” “Update,” or “Omit” in the Actions column of an import file.
- If a file was uploaded prior to August 27, 2022, the Rejected Updates section will only show the NPI and Row Number for the rejected record when expanded, see *Figure 140*).

The screenshot displays the 'Provider Bulk Upload Tool' interface. On the left is a sidebar with navigation links: 'Add Results', 'Update Results', 'Omit Results', and 'Invalid Action Results'. The main content area shows a report titled 'ExampleImportFile.xlsxsm' with a 'Last Updated' timestamp of '07/05/2022 05:29:14 PM' and a 'Closed' button. Below this is a 'Results Summary' box indicating '16 Accepted' and '3 Rejected' records. The 'Update Results Summary' section is active, showing a 'Rejected Updates' table. This table has two columns: 'ERROR !' and 'TOTAL LOCATIONS !'. The first row shows an error 'Direct Tour Hours are 0, Reason code is not blank' with 3 total locations. Below this is a table with two columns: 'NPI !' and 'ROW NUMBER !'. It lists three rejected records with their respective NPIs and row numbers.

ERROR !	TOTAL LOCATIONS !
Direct Tour Hours are 0, Reason code is not blank	3

NPI !	ROW NUMBER !
1003260423	7
1003331042	11
1003398074	14

Figure 146: Rejected Records Section for a Provider Upload from before August 27, 2022

## 2.6.6C GENERATING NEW PROVIDER IMPORT FILES FROM REJECTED RECORDS

PCOs can create new Provider Uploads with the locations with the “Update” or “Omit” action from their import file that the system could not process.





Rejected Updates						<a href="#">View Error Report</a>
ERROR ↑↓		TOTAL LOCATIONS ↑↓				
Reason Code is Populated, Reason code is not blank		3				
NPI ↑↓	LOCATION ADDRESS ↑↓	PROVIDER NAME ↑↓	IMPACTED FIELD ↑↓	ENTERED VALUE ↑↓	ROW NUMBER ↑↓	
<input checked="" type="checkbox"/>	1487917217	1210 W CLAY ST STE 4,,HOUSTON,TEXAS,77019	MARY LOVE	Reason Code, Direct Tour Hours	Relocated, 40	17
<input checked="" type="checkbox"/>	1487917217	10400 MAIN ST,,HOUSTON,TEXAS,770255500	MARY LOVE	Reason Code, Direct Tour Hours	Relocated, 40	18
<input checked="" type="checkbox"/>	1780295576	7447 HARWIN DR STE 290,,HOUSTON,TEXAS,77	JALISA TAYLOR	Reason Code, Direct Tour Hours	Relocated, 40	19

☒ Select All Rejected Records
 [Generate Provider Import File](#)

Figure 147: Rejected Records Section with Selected Rows for a New Import File

## INSTRUCTIONS

To generate an import file from rejected records

1. Select the desired records to include in the new Import File
2. Select the “Generate New Import File” button
3. Enter a name for the Provider Upload. This name will appear as the title of the card associated with this import file
4. Select the “Continue” button

Generate Provider Import File

Provider Upload Details

Configure File

Select Data Sources

Review and Generate

Provider Upload Details

Provider Upload Name

Enter Provider Upload Name

Back

Cancel

Continue

Figure 148: Generate Provider Import File Modal - Provider Upload Details Step

5. Add the editable columns that will be updated in this Provider Upload. The selected columns do not need to match the columns included in the original import file
  - a. The Reason Code column will always be pre-selected. PCOs can remove Reason Code from the import file by deselecting the checkbox next to the Reason Code option in the Editable Columns dropdown
6. Add any desired read-only columns to the import file
7. Select the “Continue” button





The screenshot shows a modal window titled "Generate Provider Import File" with a close button (X) in the top right corner. Below the title is a progress bar with four steps: "Provider Upload Details", "Configure File" (which is the active step, highlighted in blue), "Select Data Sources", and "Review and Generate".

The main content area is titled "Configure File". It lists "Default Columns Included" as: Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, and Postal Code.

Below this, there is a section for "Editable Columns" with a text input field containing "Reason Code" and a blue "+" button to its right.

Next is a section for "Additional Read Only Columns" with a text input field containing "Select Read-Only Columns" and a blue "+" button to its right.

At the bottom of the modal are three buttons: "Back", "Cancel", and "Continue".

Figure 149: Generate Provider Import File Modal - Configure File Step

8. Select a data source for any editable columns chosen in the previous step
  - a. The data source drop down will be populated based on the Current data sources on the Provider Data Sources page
  - b. If no Data Source has been uploaded for that field, select the "No Data Source" option
  - c. If Phone Number, Fax Number, or Clinician Data Reviewed were selected as editable columns, no data source is required
  - d. If a data source was chosen for the original import file, the Data Source dropdown will be prepopulated by the system
9. Select the "Continue" button





The screenshot shows the 'Generate Provider Import File' modal with the 'Select Data Sources' step active. The modal has a progress bar at the top with four steps: 'Provider Upload Details', 'Configure File', 'Select Data Sources' (highlighted), and 'Review and Generate'. Below the progress bar, the 'Select Data Sources' section contains five rows, each with a 'Column' label and a 'Data Source' dropdown menu. The columns are 'Discipline', 'Specialty', 'Location Address', 'Direct Tour Hours', and 'Reason Code'. The first four dropdowns are set to 'Example Data Source', and the last one is set to 'Select Data Source'. At the bottom, there are 'Back', 'Cancel', and 'Continue' buttons.

Column	Data Source
Discipline	Example Data Source
Specialty	Example Data Source
Location Address	Example Data Source
Direct Tour Hours	Example Data Source
Reason Code	Select Data Source

Figure 150: Generate Provider Import File Modal - Select Data Sources Step

10. Review the information entered in the modal
11. Select the "Save and Generate" button

The screenshot shows the 'Generate Provider Import File' modal with the 'Review and Generate' step active. The modal has a progress bar at the top with four steps: 'Provider Upload Details', 'Configure File', 'Select Data Sources', and 'Review and Generate' (highlighted). Below the progress bar, the 'Review and Generate' section contains three sub-sections: 'Provider Upload Details', 'Configure File', and 'Select Data Sources'. The 'Provider Upload Details' section shows 'Provider Upload Name' as 'test' and 'Filter Provider File By Status' as 'Status' with a 'Status Eligible' label. The 'Configure File' section shows 'Default Columns' as 'Action, NPI, First Name, Last Name, Discipline, Specialty, Provider Location ID, Address Line 1, Address Line 2, City, State, Postal Code', 'Editable Columns' as 'Discipline, Specialty, Location Address', and 'Read-Only Columns' as 'N/A'. The 'Select Data Sources' section shows three rows with 'Column' labels and 'Data Source' dropdowns. The first two dropdowns are set to 'No Data Source' and the third is set to 'Virginia Physician Licensee Data-Updated continuously'. At the bottom, there are 'Back', 'Cancel', and 'Save' buttons.

Column	Data Source
Discipline	No Data Source
Specialty	Virginia Physician Licensee Data-Updated continuously
Location Address	No Data Source

Figure 151: Generate Provider Import File Modal - Review and Generate Step





Once the “Save and Generate” button has been selected, the system will create a macro-enabled Excel file and add a new card for the created Provider Upload to the Provider Upload Landing Page. The Provider Upload will have an “In Progress” status. PCOs can use this new card to upload their macro-enabled Excel file to the system for processing.

#### USER NOTE

- PCOs will not be able to download the rejected records for the “Add” action.
- If Taxonomy Code, Taxonomy Type, License Number, and License State are selected as read-only columns, PCOs can adjust how many of these columns appear in their downloaded import file. PCOs can view up to 15 columns each to accommodate providers with multiple taxonomies and licenses.





## 2.7 MANAGING PROVIDER REVIEW TASKS

PCOs can use the Provider Dashboard to manage Needs Review flags indicating if there are one or more reasons a provider location requires review.

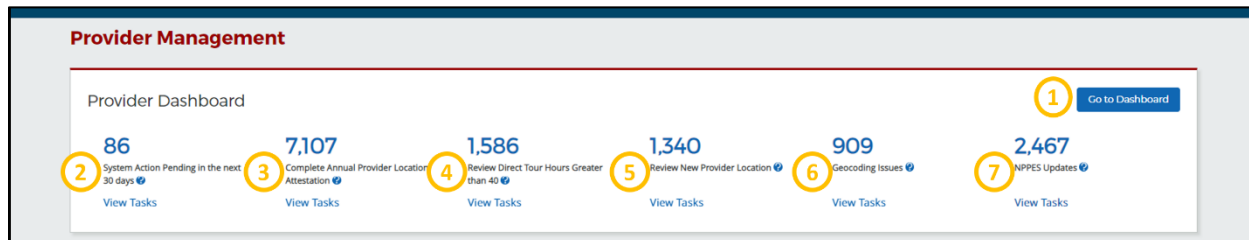


Figure 152: Provider Review Task Summary on the Provider Management Landing Page

Feature	Description
1. <a href="#">Go to Dashboard</a> (Go to Dashboard)	This button allows PCOs to navigate to the Provider Dashboard. For more information on viewing review tasks on the Provider Dashboard, see <i>2.7.1 Viewing Provider Review Tasks on the Provider Dashboard</i> .
2. System Action Pending in the next 30 days	These provider locations have an associated system action that will occur in the next 30 days.
3. Complete Annual Provider Location Attestation	These provider locations have the "Complete Annual Provider Location Attestation" flag.
4. Review Direct Tour Hours Greater than 40	These provider locations have the "Review Direct Tour Hours Greater than 40" flag.
5. Review New Provider Location	These provider locations have the "Review New Provider Location" flag.
6. Geocoding Issues	These provider locations have the "Re-geocode Provider Location", "Review Geocoded State Mismatch", or "Review Foreign Country Location" flags.
7. NPPES Updates	These provider locations have the "Review NPI Primary Address Change" or "Review Primary Taxonomy Change" flags.

### 2.7.1 VIEWING PROVIDER REVIEW TASKS ON THE PROVIDER DASHBOARD

PCOs can search for and manage provider locations that require review in their state. From this page, PCOs can navigate to provider locations to take action on open Needs Review flags.





**Provider Dashboard**  
This page is designed to help you manage providers that require review.

**Search**  
Please enter one or more of the following criteria to search for providers that require review.

Save this search (to access saved filters next time)

**Review Task**  
Select Review Task +

**System Action Pending**  
Yes No

**System Action Date**  
Select System Action Date +

**NPI**  
Enter NPI Number

**Provider Name**  
Enter Provider Name

**Discipline**  
Select Discipline +

**Specialty**  
Select Specialty +

**Status**  
Eligible Ineligible

**County**  
Select County Name +

**CSD**  
Enter CSD Number

**Census Tracts**  
Enter Census Tract Number

**Task Created Date**  
Select Task Created Date +

Search Clear

**Reviews**

Download Review Tasks

Show 3 entries

REVIEW TASK [1]	SYSTEM ACTION PENDING [2]	SYSTEM ACTION DATE [3]	NPI [4]	PROVIDER NAME [5]	DISCIPLINE [6]	SPECIALTY [7]	COUNTY [8]	CSD [9]	CENSUS TRACT [10]	STATUS [11]	TASK CREATED DATE [12]
Complete Annual Provider Location Attestation	No	N/A	1396062931	NICOLE DONALDSON	Primary Care	Family Practice	Norfolk	5171094875	51710004002	Eligible	11/01/2024 11:15:03 PM

Figure 153: Provider Dashboard

## Feature

### 1. Provider Dashboard Search

## Description

This section allows users to search for provider locations that require review across their state. For more information on searching for provider locations that require review, see *Section 2.7.2 Searching for Provider Locations that Require Review*.

### 2.

### (Download Results)

Download Review Tasks

Users will have the ability to download the Reviews report by clicking the “Download Results” button. The downloaded report will be an Excel file. This Excel file cannot be used with the Provider Import Tool. A search must be executed for the Download Results button to be enabled.

### 2. Review Task

This field displays the Needs Review flag present on the provider location. Review tasks options include:

- Complete Annual Provider Location Attestation
- Review Direct Tour Hours Greater Than 40
- Re-geocode Provider Location
- Review New Provider Location
- Review State Geocoded Mismatch
- Review Foreign Country Location
- Review NPI Primary Address Change
- Review Primary Taxonomy Change

PCOs can navigate to provider locations by selecting the hyper-linked Review Task. For more information on viewing Needs Review flags on provider locations, see *Section 2.4.2 Viewing Needs Review*. For more information on addressing Needs Review flags on provider locations, see *Section 2.5.5 Addressing Needs Review Flags*.





<b>Feature</b>	<b>Description</b>
<b>3. System Action Pending</b>	This field shows if the system will take action on the provider location to clear the Review Task.
<b>4. System Action Date</b>	This field displays the date when the system will take action on the provider location. If there is no system action pending, "N/A" will display.
<b>5. NPI</b>	This field displays the NPI of the provider with a location that requires review.
<b>6. Provider Name</b>	This field displays the first and last name of the provider with a location that requires review.
<b>7. Discipline</b>	This field displays the Discipline of the provider location that requires review.
<b>8. Specialty</b>	This field displays the Specialty of the provider location that requires review.
<b>9. Status</b>	This field displays the Status of the provider location that requires review.
<b>10. County</b>	This fields displays the geocoded County of the provider location that requires review. If the location has not been geocoded yet, this field will display as blank.
<b>11. CSD</b>	This fields displays the geocoded County Subdivision of the provider location that requires review. If the location has not been geocoded yet, this field will display as blank.
<b>12. Census Tract</b>	This fields displays the geocoded Census Tract of the provider location that requires review. If the location has not been geocoded yet, this field will display as blank.
<b>13. Task Created Date</b>	This field displays the date when the Needs Review flag was added to the provider location.

## 2.7.2 SEARCHING FOR PROVIDER LOCATIONS THAT REQUIRE REVIEW

PCOs can search for all Needs Review flags present on provider locations across their state.





The screenshot shows a search interface for provider locations. At the top, there is a 'Search' section with a prompt: 'Please enter one or more of the following criteria to search for providers that require review.' Below this is a 'Save this search (to access saved filters next time)' button. The search criteria are organized into a grid of fields, each with a numbered callout:

- 1 Review Task:** A dropdown menu labeled 'Select Review Task'.
- 2 System Action Pending:** Radio buttons for 'Yes' and 'No'.
- 3 System Action Date:** A date picker labeled 'Select System Action Date'.
- 4 NPI:** A text input field labeled 'Enter NPI Number'.
- 5 Provider Name:** A text input field labeled 'Enter Provider Name'.
- 6 Discipline:** A dropdown menu labeled 'Select Discipline'.
- 7 Specialty:** A dropdown menu labeled 'Select Specialty'.
- 8 Status:** Radio buttons for 'Eligible' and 'Ineligible'.
- 9 County:** A dropdown menu labeled 'Select County Name'.
- 10 CSD:** A text input field labeled 'Enter CSD Number'.
- 11 Census Tracts:** A text input field labeled 'Enter Census Tract Number'.
- 12 Task Created Date:** A date picker labeled 'Select Task Created Date'.
- 13 Search:** A button to execute the search.
- 14 Clear:** A button to reset the search filters.

Figure 154: Provider Location Search Card

## Feature

### 1. Review Task

## Description

This field allows users to search for provider locations by the assigned Needs Review flag.

### 2. System Action Pending

This field allows PCOs to search for provider locations with an automatic system action. System Action Pending options include:

- Yes
- No

### 3. System Action Pending Date

This field allows users to search for provider locations by the date when the system will take action on the provider location. Users can search by a single date or by a date range.

### 4. NPI

This field allows users to search for providers by their National Provider Identifier (NPI). Only exact matches will be returned.

### 5. Provider Name

This field allows users to search for provider locations by First or Last Name.

### 6. Discipline

This field allows users to search for provider locations by one or multiple disciplines. Discipline selections include:

- Primary Care
- Dental Health
- Mental Health


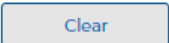
### 7. Specialty

This field allows users to search for provider locations by one or more specialty. This field can only be completed once a discipline has been selected. Once a discipline is selected, only the specialties that fall under that discipline will be available for selection. If multiple disciplines were selected, all specialties that apply will be available as drop-down menu options. Specialty selections include:

- If Primary Care is chosen:
  - Certified Nurse Midwife
  - Family Practice
  - General Practitioner
  - Internal Medicine
  - Obstetrics and Gynecology





Feature	Description
	<ul style="list-style-type: none"> <li>○ Pediatrics</li> <li>• If Dental Health is chosen                             <ul style="list-style-type: none"> <li>○ Dentist</li> </ul> </li> <li>• If Mental Health is chosen                             <ul style="list-style-type: none"> <li>○ Psychiatrist</li> <li>○ Clinical Social Psychologist</li> <li>○ Clinical Social Worker</li> <li>○ Psychiatric Nurse Specialist</li> <li>○ Marriage and Family</li> </ul> </li> </ul>
8. Status	<p>This field allows users to search for providers by status. Status selections include:</p> <ul style="list-style-type: none"> <li>• Eligible</li> <li>• Ineligible</li> </ul>
9. County	<p>This field allows users to search for providers by one or multiple counties in their particular state.</p>
10. CSD	<p>This field allows users to search for providers by one or multiple county subdivisions in their particular state. Users can begin entering the CSD and then choose from a filtered list.</p>
11. Census Tract	<p>This field allows users to search for providers by one or multiple census tracts in their particular state. Users can begin entering the census tract and then choose from a filtered list.</p>
12. Task Created Date	<p>This field allows users to search for provider locations by the date when the Needs Review flag was added to the provider location. Users can search by a single date or by a date range.</p>
13.  (Search Button)	<p>When the desired fields are selected, users should click the Search button to initiate the search. At least one field must be selected before the Search button is enabled.</p>
14.  (Clear Button)	<p>Users may select this button to clear the fields used during a search. Selecting the “Clear” button on this page will also remove the search results from view.</p>

## 2.7.2A SAVING COMMON PROVIDER DASHBOARD SEARCHES

PCOs can save commonly used searches using by selecting “Save this Search” link and entering the required information.





**Search**  
Please enter one or more of the following criteria to search for providers that require review.

[Close saved searches](#)

Please enter a name to save the selected filters for future searches.

**Name** **Make Default**

Example Search ☐

**Save** **Cancel**

---

**Review Task** **System Action Pending** **System Action Date** **NPI**

Complete Annual Provider Location A...  ☐ Yes ☐ No

**Provider Name** **Discipline** **Specialty** **Status**

Enter Provider Name     ☐ Eligible ☐ Ineligible

**County** **CSD** **Census Tracts** **Task Created Date**

Select County Name

**Search** **Clear**

**Figure 155: Create New Saved Search on Provider Dashboard**

## INSTRUCTIONS

To create a new saved search:

1. Select the desired search criteria
2. Enter a name for the saved search
3. Select the “Make Default” button (Optional)
  - a. If selected, the chosen search criteria will be pre-populated with the Saved Search when the user navigates to the Provider Dashboard
  - b. If a user already has a default search selected, the newly created search will override the existing default search
4. Select the “Save” button

Once a search has been saved, PCOs can view the saved search filters by opening the “Save this Search” accordion in the Provider Dashboard Search section. If a saved search is selected as the default search, the search filters will be populated automatically when the user navigates to the Provider Dashboard using the “Go to Dashboard” button.





The screenshot displays a 'Search' interface. At the top, it says 'Please enter one or more of the following criteria to search for providers that require review.' Below this is a section for 'Close saved searches' with a list of 'Example Default Search' and a 'Default' tag. A text input field for 'Name' is followed by a 'Make Default' checkbox and 'Save' and 'Cancel' buttons. Below the input field, there are two rows of saved searches. The first row shows 'Example Default Search' with a 'Default' tag, a 'Remove Default' button, an 'Apply Search Criteria' button, and a 'Delete' button. The second row shows 'Example Search' with a 'Make Default' button, an 'Apply Search Criteria' button, and a 'Delete' button. Four yellow circles with numbers 1 through 4 are overlaid on the interface: 1 is on the search name, 2 is on the 'Remove Default' button, 3 is on the 'Apply Search Criteria' button, and 4 is on the 'Delete' button.

Figure 156: Provider Dashboard Existing Saved Searches

## Feature

### 1. Search Name

## Description

This field shows the user entered name of the saved search. If the saved search has been set as the default, a purple “Default” tag will appear next to the search name.

### 2. Make / Remove Default

Users can only have one default search at a time. This button allows the users to remove or change the default saved search.

### 3. Apply Saved Search

This button allows users to apply their saved search. Selecting this button will populate the search criteria included in the saved search. The user must select the “Search” button to see the filtered results in the Reviews table.

### 4. Delete

This button allows users to delete a saved search. The deleted saved search will no longer appear in the Provider Dashboard search card. No provider data will be impacted by deleting a saved search.





## 2.8 ATTESTING PROVIDER LOCATIONS

PCOs can navigate to the Provider Location Attestation page from the Provider Management Landing Page. PCOs can attest to provider locations using a new tool located on the Provider Management Homepage. On this page, PCOs can manage provider locations with the “Complete Annual Provider Location Attestation” Needs Review Flag.

The screenshot shows the 'Provider Management' dashboard. At the top, there's a 'Provider Dashboard' section with six metrics: 'System Action Pending in the next 30 days' (0), 'Complete Annual Provider Location Attestation' (4,531), 'Review Direct Tour Hours Greater than 40' (677), 'Review New Provider Location' (126), 'Geocoding Issues' (9), and 'NPPES Updates' (1,251). Each metric has a 'View Tasks' link. To the right is a 'Go to Dashboard' button. Below the dashboard, there are three main sections: 'Provider Search' with filters for State, County Name, Discipline, Specialty, First Name, Last Name, NPI, and Status; 'Provider Bulk Actions' with links for 'Manage Provider Uploads' and 'Attest Provider Locations' (highlighted with a yellow box); and 'Provider Data Sources' with a 'Manage Data Sources' button.

Figure 157: Navigation to the Provider Location Attestation Page


### 2.8.1 VIEWING THE PROVIDER LOCATION ATTESTATION TOOL

The screenshot shows the 'Provider Location Attestation' page. It features a search bar with filters for County, Discipline, and Specialty. Below the search bar, there's a table of provider locations. The first entry is an 'Example Provider' with details like NPI, address, discipline, and specialties. The page is annotated with 18 numbered callouts: 1 points to the search bar, 2 to the 'Clear' button, 3 to the 'Example Provider' header, 4 to the provider details, 5 to the 'Clinical Information' section, 6 to the 'Specialty' field, 7 to the 'Direct Tour Hours' field, 8 to the 'Populations Served Data' section, 9 to the 'Medical Patient %' field, 10 to the 'Sliding Fee Scale %' field, 11 to the 'Provider Employment Status' section, 12 to the 'Location Information' section, 13 to the 'Last Modified Date' field, 14 to the 'Clinician Review Date' field, 15 to the 'Task Created Date' field, 16 to the 'Attest Provider Location' button, 17 to the 'Needs Review Flags' section, and 18 to the 'Edit Location' button.

Figure 158: Provider Location Attestation Page





Feature	Description
<b>1. Provider Location Search</b>	This section allows users to search for provider locations that have a “Complete Annual Provider Location Attestation” Needs Review flag.
<b>2. Provider Name</b>	This field displays the first and last name of the provider with a location that needs to be attested.
<b>3. NPI</b>	This field displays the NPI of the provider with a location that needs to be attested.
<b>4. Provider Address</b>	This field displays the address of the provider with a location that needs to be attested.
<b>5. Discipline</b>	This field displays the discipline of the provider with a location that needs to be attested.
<b>6. Specialty</b>	This field displays the specialty of the provider with a location that needs to be attested.
<b>7. Direct Tour Hours</b>	This field displays the direct tour hours of the provider with a location that needs to be attested.
<b>8. Annual Medicaid Claims</b>	This field displays the annual Medicaid Claims of the provider with a location that needs to be attested.
<b>9. Medicaid Patient %</b>	This field displays the percentage of time the provider serves Medicaid patients at the location that needs to be attested.
<b>10. Sliding Fee Scale %</b>	This field displays the percentage of time the provider serves Sliding Fee Scale patients at the location that needs to be attested.
<b>11. Intern or Resident?</b>	This field displays if a provider with a location that needs to be attested is an intern or resident.
<b>12. Site Type</b>	This field displays the site type of the provider with a location that needs to be attested.
<b>13. Last Modified Date</b>	This field displays the last modified date of the provider with a location that needs to be attested.
<b>14. Clinician Review Date</b>	This field displays the clinician review date of the provider with a location that needs to be attested.
<b>15. Task Created Date</b>	This field displays the task created date of the provider with a location that needs to be attested.
<b>16. </b>	This button allows the user to complete location attestation. The button opens to a pop-up where attestation can be completed.
<b>Attest Provider Location (button)</b>	
<b>17. Needs Review Flags</b>	This field displays flags that are pending review. The flags are displayed in yellow highlighted text.





[Edit Location](#)

**18.**  
**Edit Location (button)**

This button will navigate the user to the provider location to make any required updates. For more information on editing provider locations, see *Section 2.5.2 Updating Provider Locations*.

## 2.8.2 SEARCHING FOR PROVIDER LOCATIONS TO ATTEST

PCOs can use filters to search for provider locations that require attestation.

**Figure 159: Provider Location Search Card**

### Feature

#### 1. County

### Description

This field allows users to search for provider locations by one or multiple counties in their particular state.

#### 2. Discipline

This field allows users to search for provider locations by discipline. Discipline selections include:

- Primary Care
- Dental Health
- Mental Health

#### 3. Specialty

This field allows users to search for provider locations by specialty. Specialty selections include:

- Family Practice
- Internal Medicine
- Pediatrics

#### 4. (Search Button)

When the desired fields are selected, users should click the Search button to initiate the search. At least one field must be selected before the Search button is enabled.

#### 5. (Clear Button)

Users may select this button to clear the fields used during a search. Selecting the “Clear” button on this page will also remove the search results from view.

## 2.8.3 ATTESTING PROVIDER LOCATIONS





PCOs can attest provider location after reviewing the provider card. After clicking the “Attest Provider Location” button, a pop-up will appear to complete the attestation.

The screenshot shows the 'Provider Location Attestation' page. A search bar at the top allows filtering by County, Discipline, and Specialty. Below the search bar, a provider card for 'Example Provider' (NPI: 189384393, 01 Example St, Bristol, VA 37620) is displayed. The card includes sections for Clinical Information (Discipline: Mental Health), Populations Served Data (Annual Medicaid Claims: 0), Provider Employment Status (Intern or Resident?: No), and Location Information (Site Type: ---). A table at the bottom shows 'Last Modified Date' (06/05/2023), 'Clinician Review Date', and 'Task Created Date' (09/22/2014). A pop-up window titled 'Attest Provider Information' is overlaid on the card. The pop-up contains the text: 'I attest that, to the best of my knowledge, the clinician data is (1) reviewed; (2) correct; and (3) subject to compliance verification.' Below this text is a checkbox labeled 'I have read and acknowledge the statement above.' At the bottom of the pop-up are 'Confirm' and 'Cancel' buttons. An 'Attest Provider Location' button is visible on the right side of the provider card.

Figure 160: Attest Provider Information Pop-Up

## INSTRUCTIONS

To attest a provider location:

1. Select the “Attest Provider Location” button
2. Select the checkbox
3. Select the “Confirm” button

Once a user has confirmed the attestation, a success banner will display at the top of the page. No further action by the PCO is needed.

The screenshot shows a green success banner at the top of the page. The banner contains the text: 'Success! JORDAN PAYNE attestation has been completed.' and a close button (X) on the right side.

Figure 154: Success Banner when Completing a Provider Location Attestation





## APPENDIX A – EDITABLE PROVIDER DATA FIELDS

PCOs can edit provider locations in their state and for locations with the state code Foreign Country (ZZ). PCOs can edit provider data on provider locations, in the Search Results Grid, or in bulk using the Provider Import Tool (locations in their state only).

When a new provider location is created in SDMS, the system will automatically set certain fields to default values. Default fields will display “Last Updated By: System” when viewing supporting details for the respective fields indicating that this is a default value. PCOs can override default values at any time.

Below is a list of editable fields and relevant business rules. All other fields displayed are read-only.

Data Field	Provider Location Section	Search Grid Edit Format	Import File Action	User Notes
Reason Code / PCO Omitted Reason	Location Information	Drop-down	- Omit	<p>Default value will be blank.</p> <p>If a reason code is added to a location record, “Status” will update to Ineligible and the “Ineligible: PCO Omitted” column in the Search Grid will be set to Yes.</p> <p>The PCO Omitted Reason will also be displayed on the provider location</p> <p>If a reason code is removed and the location has no other ineligible reasons, “Status” will update to eligible.</p>
Phone Number	Location Information	Character Input	- Add - Update	<p>Default value will be blank.</p> <p>Users can enter up to 30 digits (10 for the phone number and up to 20 for the extension).</p>
Fax Number	Location Information	Character Input	- Add - Update	<p>Default value will be blank</p> <p>Users can enter up to 30 digits (10 for the phone number and up to 20 for the extension).</p>
Organizational NPI	Location Information	Character Input	- Add - Update	<p>Default value will be N/A.</p> <p>Users must enter 10 digits.</p>
Site Type	Site Type	Drop-down	- Add - Update	<p>Default value will be blank.</p> <p>If the location is associated to a site, the Site Type will be defaulted based on the site type of the site association.</p> <p>“State/County Mental Hospital” will only be an available option if the provider’s discipline is Mental Health.</p>





Data Field	Provider Location Section	Search Grid Edit Format	Import File Action	User Notes
				PCOs seeking to identify a provider who is serving at a correctional facility should only be selecting State or Federal Correctional Facility as the Site Type. They should not also be omitting the provider using the “Not Public Access Facility” omission code.
Discipline	Clinical Information	Drop-down	- Add - Update	<p>Default value will be set based on the provider’s primary, active taxonomy.</p> <p>If the user changes the discipline, the specialty must also be updated.</p> <p>Setting the discipline and specialty will clear the “No Discipline/Specialty” ineligible reason and the “Ineligible: No Discipline/Specialty” column on the Search Grid.</p>
Specialty	Clinical Information	Drop-down	- Add - Update	<p>Default value will be set based on the provider’s primary, active taxonomy.</p> <p>This field is dynamic based on which discipline is selected.</p> <p>If the user changes the discipline, the specialty must also be updated.</p> <p>Setting the discipline and specialty will clear the “No Discipline/Specialty” ineligible reason and the “Ineligible: No Discipline/Specialty” column on the Search Grid.</p>
Dental Auxiliaries	Clinical Information	Drop Down	- Add - Update	<p>Default value will be set to Unknown.</p> <p>This field is only enabled if Dental Health is selected as the discipline.</p>
Direct Tour Hours	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 40.</p> <p>Users can enter a whole integer between 0 and 168.</p> <p>The user may enter Direct Tour Hours greater than 40 and up to 168, but a maximum of 40 hours will be used by the system in order to calculate FTE.</p> <p>If the direct tour hours are set to 0, the provider must be omitted by selecting a Reason Code/PCO Omitted Reason.</p>





Data Field	Provider Location Section	Search Grid Edit Format	Import File Action	User Notes
Annual Medicaid Claims	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 999,999,999.</p> <p>For Primary Care, any value 5000 and above results in an FTE of 1. For Mental Health and Dental Health, any value 4000 and above results in an FTE of 1.</p>
Medicaid %	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 100.</p>
Sliding Fee Scale %	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 100.</p>
Homeless %	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 100.</p>
Migrant Farmworker %	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 100.</p>
Migrant Seasonal Farmworker %	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 100.</p>
American Indian/Alaska Native %	Clinical Information	Numerical with Input Stepper	- Add - Update	<p>Default value will be set to 0.</p> <p>Users can enter a whole integer between 0 and 100.</p>
Intern or Resident?	Employment Status	Drop-down	- Add - Update	<p>Default value be set to No.</p> <p>If Yes is selected, the location's FTE values will be affected as follows:</p> <ul style="list-style-type: none"> <li>For Primary Care, the FTE will be set to 0.1</li> <li>For Mental Health, the FTE will be set to 0.5</li> </ul>
J1 Visa Waiver Holder?	Employment Status	Drop-down	- Add - Update	<p>Default value will be set to No.</p> <p>If Yes is selected, the location's FTE values will be set to 0.</p> <p>If Yes is selected, the location will become ineligible with a reason of "Is J1 Visa Waiver</p>





Data Field	Provider Location Section	Search Grid Edit Format	Import File Action	User Notes
				Holder” the “Ineligible: J1 Visa Waiver Holder” column in the Search Grid will be set to Yes.  If No is selected and no other ineligible reason applies, the location will become eligible.
Federal Provider	Employment Status	Drop-down	- Add - Update	Default value will be set to No.  If Yes is selected, the location will become ineligible with an ineligible reason of “Is Federal Provider” and the “Ineligible: Federal Provider” column in the Search Grid will be set to Yes.  If No is selected and no other ineligible reason applies, the location will become eligible.
Display Address	Location Address	Drop-down	N/A	For locations that have been successfully geocoded (Match Levels between 1 and 3), the display address will default to the standardized address.  For locations that are not successfully geocoded (Match Level of 4 or greater) or manually geocoded (Match Level of 0), the display address will default to the physical address.
Clinician Data Reviewed	Attestation Banner	N/A	- Add - Update	Default value will be set to No.

The following data fields can only be edited on provider locations.

Data Field	Provider Location Section	User Notes
Designation/Organization Name	Location Information	Default value will be blank.  This field will be automatically populated if a PCO initiates a site association.
Site Name	Location Information	Default value will be blank.  This field will be automatically populated if a PCO initiates a site association.
Designation ID	Location Information	Default value will be blank.  This field will be automatically populated if a PCO initiates a site association.
Organization Unique ID	Location Information	Default value will be blank.





Data Field	Provider Location Section	User Notes
		This field will be automatically populated if a PCO initiates a site association.
Designation Status	Location Information	Default value will be blank.  This field will be automatically populated if a PCO initiates a site association.
Latitude	Location Address	Default value will be set based on HDW geocoding service.  Users can enter up to 10 decimal values.
Longitude	Location Address	Default value will be set based on HDW geocoding service.  Users can enter up to 10 decimal values.
Manually Moving the Pin on the Map	Location Address	Moving the pin on the map will change the values in the Latitude and Longitude fields in real time.

The following data fields can only be edited in an import file when adding a new provider location using the Import Tool.

Data Field	Import File Action	User Notes
Address Line 1	- Add	Must be a valid address containing alphanumeric characters. This field cannot be blank.
Address Line 2	- Add	May be included in new location records.
City	- Add	Must be within the state of the PCO modifying the record. This field cannot be blank and must contain alphabetic characters
Postal Code	- Add	Must be within the state of the PCO modifying the record. This field cannot be blank and must be a 5 to 9 digit number.
State	- Add	When adding new locations using the Add New Locations pop-up modal, state will default to the PCO's assigned state and cannot be edited.  Must be within the state of the PCO modifying the record. The field cannot be blank and must be a valid state/territory abbreviation.





## APPENDIX B – CHANGES TO LAST UPDATED BY BANNER

Updates to provider data and provider locations cause the Last Updated By Banner at the top of the provider profiles and locations and in the supporting details for editable fields on a provider location to be changed. Below is a list of possible updates and relevant business rules.

Update Type	Update Initiator	Updates Location Last Modified Date?	Updates Location Last Modified by?	Updates Profile Last Updated Date?	Updates Profile Last Updated by?	Updates Supporting Details?
New Provider	NPPES - Import	Yes	Yes	Yes	Yes	Yes
NPI Address	NPPES - Import	Yes	Yes	Yes	Yes	Yes
Taxonomy Change	NPPES - Import	No	No	Yes	Yes	No
DoB Update	NPPES - DoB	No	No	Yes	Yes	No
Deactivate Provider	NPPES - Import	Yes	Yes	Yes	Yes	Yes
Reactivate Provider	NPPES - Import	Yes	Yes	Yes	Yes	Yes
NHSC Nightly Job	System - NHSC	Yes	Yes	Yes	Yes	No
Needs Review Flags Nightly Job	System – Needs Review	No	No	No	No	No
New Location through Portal	User	Yes	Yes	Yes	Yes	Yes
New Location Through Import Tool	User	Yes	Yes	Yes	Yes	Yes
Location Updated Through Search Page	User	Yes	Yes	Yes	Yes	Yes
Location Updated Through Location Page (includes geocoding)	User	Yes	Yes	Yes	Yes	Yes





Update Type	Update Initiator	Updates Location Last Modified Date?	Updates Location Last Modified by?	Updates Profile Last Updated Date?	Updates Profile Last Updated by?	Updates Supporting Details?
Location Updated Through Import Tool (includes geocoding)	User	Yes	Yes	Yes	Yes	Yes
Location Updated by the System	Admin	Yes	Yes	Yes	Yes	Yes
Location Updated by approval of a Facility HPSA Designation	User	No	No	No	No	Yes
Batch Geocoding Updates	System - Geocode	No	No	No	No	No





## APPENDIX C – INELIGIBLE REASONS AND PCO OMITTED REASONS

If a provider location is ineligible, it must have one or more ineligible reasons. Ineligible locations will not be considered during the designation process. Below is a list of possible Ineligible Reasons and relevant descriptions.

Reason	Description
CMS Deactivated	CMS deactivated the provider. This ineligible reason can only be removed by a change in the CMS NPPES NPI Delta file.
PCO Omitted	The PCO selected a PCO Omitted Reason. For more information on how to omit provider locations, see <i>Section 2.5.4 Omitting Provider Locations</i> .
Not Geocoded	The system received a geocoded match level of 4 or higher. This ineligible reason can be removed by prompting the system to attempt to geocode the address again or by manually geocoding the address. For more information on resolving geocoding issues, see <i>Section 2.5.2B Re-Geocoding Provider Locations</i> .
Is Federal Provider	The PCO indicated that the provider is a federal provider. This ineligible reason can be removed by indicating that the provider is not a federal provider in the “Employment Status” section on the provider location page.
Is J1 Visa Waiver Holder	The PCO indicated that the provider is a J1 Visa Waiver Holder. This ineligible reason can be removed by indicating that the provider is not a J1 Visa Waiver Holder in the “Employment Status” section on the provider location page.
Is NHSC Employee	The provider is an Active NHSC participant. This ineligible reason can only be removed by a change in the participant’s status in BMISS.
No Discipline/Specialty	The provider’s primary taxonomy does not map to a valid discipline/specialty combination in SDMS. This ineligible reason can be removed by adding a valid discipline and specialty. For more information on how to add a valid discipline and specialty see <i>Section 2.5.2 Updating Provider Locations</i> .
New, Not Reviewed	The provider was imported into SDMS but has not been reviewed and/or updated by the PCO. This ineligible reason can be removed by making any change to a provider location. For more information on removing this ineligible reason, see <i>Section 2.5.5D Review New Provider Location</i> .





## PCO OMITTED REASON DEFINITIONS

If a provider location is ineligible and has been omitted by a PCO, a PCO Omitted Reason must be provided. Below is a list of possible PCO Omitted Reasons and relevant descriptions.

Reason	Description
Admin Only	Medical care not provided at this location, only used for administrative purposes
Core Mental Health Provider	Provider has a Core Mental Health specialty  This PCO Omitted Reason will only display on provider locations with a Mental Health Discipline.
Deceased	Provider is deceased
Duplicate Entry	Duplicate of an existing location
Faculty	Location is an academic or research location
Incorrect Profession	Provider is listed with an incorrect taxonomy
Inpatient Facility Only	Facility has no outpatient services
License Suspended by State/In Disciplinary Status by State	Provider is not practicing due to a suspended license
Locum Tenens/As Necessary	Provider is standing in for the permanent full-time provider at this site
Military Address	Location is a military facility
Non-Fed Not Licensed in State	Provider not working at federal facility and also not licensed in state
Not a Service Delivery Site	Medical care cannot be accessed at this location (Possible home address or an administrative location)
Not in Clinical Practices	Provider not currently in clinical practice
Not Public Access Facility	Facility does not offer care to the general public
Open-Ended Long-Term Leave	Provider is on an extended leave from practice
Relocated	Location omitted because provider moved
Retired	Provider has retired
Specialist/Subspecialist	Provider has an eligible taxonomy but practices an ineligible subspecialty
Urgent Care Clinic	Location is an urgent care clinic and does not provide full scope of Primary, Mental, or Dental care





## APPENDIX D – IMPORT TOOL ERROR MESSAGES

In a Provider Upload Report, PCOs can see a detailed error message for each record in an import file that was not processed. Below is a list of possible error messages and recommended resolution.

Any issue with updating a record using the import tool can also be addressed by editing using the Provider Search Results table or from a provider location. For more information on editing in the Provider Management portal, see *Section 2.2.4 Editing Provider Locations in the Search Results Grid* and *Section 2.4 Viewing Provider Location*.

Error Message	Action	Resolution
Address Line 1 does not contain any letters	- Add - Update - Omit	Review the address and update the Address Line 1 column to contain letters.
Address Line 1 is blank	- Add - Update - Omit	Review the address and update the Address Line 1 column.
Address Line 1 length greater than 255 characters	- Add - Update - Omit	Review the address and decrease the characters in the Address Line 1 column.
Address Line 2 length greater than 255 characters	- Add - Update - Omit	Review the address and decrease the characters in the Address Line 2 column.
All fields are blank	- Add - Update - Omit	Enter data in the following fields: NPI, First Name, Last Name, Discipline, Specialty, Address Line 1, Address Line 2, City, State, Postal Code
American Indian/Alaska Native Percentage greater than 100	- Add - Update	Update the American Indian/Alaska Native % Column to be between 0 and 100.
An identical location exists that has not been geocoded, please manually geocode location	- Add	Select the Update action for the existing location. No additional data needs to be changed to trigger a regeocode.
Annual Medicaid Claims less than 0	- Add - Update	Update the Medicaid Claims column so it is 0 or greater.
Both Discipline and Specialty should contain a value	- Add - Update	Enter a discipline and specialty for the impacted record.
City cannot contain numeric values	- Add	Review the city name and remove any numeric values. The City column should only contain letters.
City is blank	- Add	Review the address and update the City column.
Dental Auxiliaries contains an invalid value	- Add - Update	Choose an option from the drop-down in the Dental Auxiliaries column.
Direct Tour Hours are 0	- Add - Update	Include a Reason Code and set the Action to Omit. Eligible providers cannot have 0 Direct Tour Hours.
Direct Tour Hours greater than 168	- Add - Update	Update the Direct Tour Hour column to be between 0 and 168
Direct Tour Hours less than 0	- Add - Update	Update the Direct Tour Hour column to be between 0 and 168





Error Message	Action	Resolution
Direct Tour Hours not numeric	- Add - Update	Update the Direct Tour Hour column to be between 0 and 168
Discipline must be Mental Health if the Site Type is State/County Mental Hospital	- Add - Update	Change the Discipline to Mental Health or change the Site Type to a different selection. Locations that do not have a Mental Health discipline cannot have "State/County Mental Hospital" as their Site Type.
Duplicate Existing Address.	- Add	This address already exists for this provider NPI.
Fax number must be between 10 - 30 digits	- Add - Update	Fax number must be between 10 and 30 digits and should be formatted as (xxx) xxx-xxxx
Homeless Percentage greater than 100	- Add - Update	Update the Homeless % Column to be between 0 and 100.
Invalid Zip Code	- Add - Update - Omit	Review the address and update the Zip Code column. The Zip Code column should contain at least 5 numbers.
Location included in another Provider Upload that is ready for review.	- Add - Update - Omit	Finalize the previously uploaded import file. Update the location through the web portal or cancel the more recent Provider Upload.
Location has been modified since the location data was exported	- Update - Omit	The provider location has been changed since the file was initially downloaded. Update the location through the web portal or download a new import file.
Location not found.	- Update - Omit	The Provider Location ID must match for the system to identify a provider location.
Medicaid Patient Percentage greater than 100	- Add - Update	Update the Medicaid Patient % Column to be between 0 and 100.
Migrant Farmworker Percentage greater than 100	- Add - Update	Update the Migrant Farmworker % Column to be between 0 and 100.
Migrant Seasonal Farmworker Percentage greater than 100	- Add - Update	Update the Migrant Seasonal Farmworker % Column to be between 0 and 100.
Not all address fields exist	- Add	The following address columns must be present when adding a new location: Address Line 1 Address Line 2 City State Postal Code
NPI does not exist	- Add - Update - Omit	PCOs can only add locations for providers that have been imported from CMS. If the NPI cannot be found, locations cannot be added or updated. Review the entered NPI and ensure it matches an NPI already in the system
NPI is blank	- Add - Update	Review the provider and enter a value in the NPI column.





Error Message	Action	Resolution
	- Omit	
NPI is not the correct length	- Add - Update - Omit	NPIs are all ten digits. Review the entered NPI and ensure it has 10 numbers.
PCO Omitted Reason cannot be Core Mental Health Provider if Discipline is not Mental Health	- Omit	The Core Mental Health Provider PCO Omitted Reason cannot be added to provider locations with a Primary Care or Dental health discipline.
Phone number must be between 10 - 30 digits	- Add - Update	Phone number must be between 10 and 30 digits and should be formatted as (xxx) xxx-xxxx
Provider has been deactivated by CMS	- Add - Update - Omit	The provider can no longer be edited. All data for providers deactivated by CMS are read-only.
Reason code is blank	- Omit	The Reason Code column must be populated if the Direct Tour Hours column is set to 0 or if the provider is being omitted.
Reason code is not blank	- Add - Update	The Reason Code column should not be populated for eligible providers. If a provider should be marked as ineligible, use the Omit action.
Sliding Fee Percentage greater than 100	- Add - Update	Update the Sliding Fee % Column to be between 0 and 100.
State abbreviation is invalid	- Add	The state in the location must match the state abbreviation associated with the PCO. The system only accepts State Postal Codes.
State does not match PCO state	- Add - Update - Omit	The state in the location should match the state associated with the PCO. The system only accepts State Postal Codes.

If the system could not process the import file, one of the following error messages will display:

Error Message	Resolution
Error! This file is missing a required column.	Cancel the Provider Upload. Ensure the file has all of the required columns.
Error! This file could not be processed.	Cancel the Provider Upload. Upload a new version of the import file. Ensure both "Provider Locations" and "Metadata" tabs are present, the tab names have not been modified, and the macro has been enabled. =
Error! The file creation date is missing or invalid.	Cancel the Provider Upload. Ensure the timestamp on the "Metadata" tab is formatted as follows: MM/DD/YYYY HH:MM:SS, and the cell format is set to text.
Error! This file is a duplicate.	Cancel the Provider Upload. Upload a different file that has not previously been uploaded to the system.
Error! No Actions were selected in this file.	Cancel the Provider Upload. Ensure values are entered in the Actions column.

