



# California 274 SUD User Guide

Version 1.2  
8.2.2024

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## Overview

The purpose of this user guide is to outline the reporting process, workflow and logic for reporting California SUD Provider data and produce a 274 SUD file from the SmartCare system.

The recommended workflow from prior to go live to post go live is as follows:

1. Before going live, staff records can be migrated into the system so that the system is set up and ready to use. The recommended data migration is in the [California State Reporting Data Migration Needs](#) worksheet. The Data Elements for the Sites all start with NACT or 274.
2. Once live, the workflow is that each staff is entered manually by a county staff person after go live. All staff updates are also maintained manually.

## Reporting Process

The reporting workflow includes the following process:

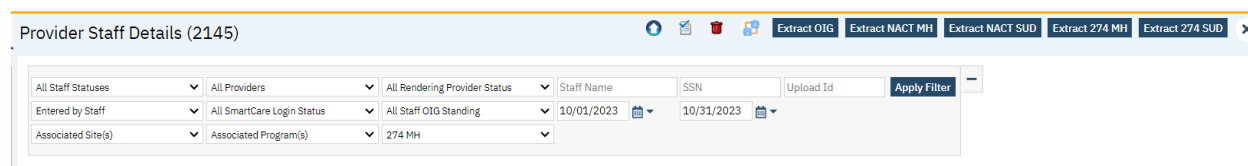
1. County staff create Staff in SmartCare Staff table using the [Workflows](#) noted below.
  - a. There is a checkbox on this screen named, 'Staff is reportable to NACT/274 and Information is complete - SUD'. This checkbox when checked will trigger validations when clicking Save for the required fields for 274 reporting on the Staff Details screen.
  - b. This checkbox, 'Staff is reportable to NACT/274 and Information is complete - SUD' must be checked once staff are confident they have the staff information all set up and ready for 274 SUD reporting.
2. SmartCare process finds all New or Updated Staff Records through a job and Adds to Provider Staff Uploads screen
  - a. The list page associated to this screen will provide validation checks as well for any information which should be reviewed. Users should use this list page throughout the month for records with errors to address.
3. User can navigate to see Staff details from the job extract by clicking on the UploadId hyperlink OR directly open the Provider staff details screen to see all the staff records
4. User can review errors on the Provider Staff details screen and work on those errors by clicking on the individual Staff Id hyperlink and edit data in the DFA screen
5. Once ready, user will come back to the Provider Staff details screen to extract staff data in the respective format for NACT/274 by clicking on the tools on the top right corner of the screen
6. If there are records with errors, Staff will get alert : You have one or more records with errors. Do you want to proceed with creating a file with errors?
7. If user chooses to proceed, NACT/274 file is produced to be reported

## Reporting User Interface

Provider Staff Details is the Screen where a user can see all of the staff which will be reported in the NACT and 274 processes. The purpose of the screen is to view the data which is or will be reported and errors that could occur during submission.

## Monitoring Reporting Prior to Submission

The errors in the Staff record can be monitored by the error icon that appears against each staff record. On-hover of this icon comma-separated error messages will be displayed for the user to correct those errors before submission. See screenshot below.



The screenshot shows the 'Provider Staff Details (2145)' interface. At the top, there are navigation tabs: 'Extract OIG', 'Extract NACT MH', 'Extract NACT SUD', 'Extract 274 MH', and 'Extract 274 SUD'. Below the tabs is a filter section with several dropdown menus and input fields:

- All Staff Statuses (dropdown)
- All Providers (dropdown)
- All Rendering Provider Status (dropdown)
- Staff Name (input field)
- SSN (input field)
- Upload Id (input field)
- Apply Filter (button)
- Entered by Staff (dropdown)
- All SmartCare Login Status (dropdown)
- All Staff OIG Standing (dropdown)
- 10/01/2023 (date field)
- 10/31/2023 (date field)
- Associated Site(s) (dropdown)
- Associated Program(s) (dropdown)
- 274 MH (dropdown)

The user can work on cleaning the errors by going to the respective staff details and filling the missing data or by updating incorrect/invalid data.

The user can delete Staff records that need to be excluded from the submission OR that are no longer needed to be reported. The user can do so by filtering for such staff records and by clicking on the delete icon on the Provider Staff details list page. This will delete all the staff records that are currently displayed on the screen.

## Creating a New Extract and Submitting Files

Once all the staff records are reviewed and the data is ready for submission, the respective button can be clicked to Extract NACT SUD, NACT MH, 274 MH, 274 SUD file in their State specified format. The reportable file will be downloaded to the users local Downloads folder, the Compliance Batch Details and the customer's SFTP for the user to review and manually upload to their State Portal for validity.

- All Staff Statuses filter can be used to determine which records are included in a 274 SUD file.
  - Filter for 'Staff with current record' = The 274 SUD will include only staff records with the green checkmark, indicating they are without errors.
  - Filter for 'All Staff Statuses' or 'Staff with Errors' = The 274 SUD file will include all records per the logic outlined in the File Logic section of this guide.
  - Filter for the reporting month using the date fields
  - Filter for Staff eligible for a particular File Type by selecting 274 SUD file type
- Once the extract is successfully created, the system will create a batch entry in the Compliance Batch List page screen with the records that are included in the extract.

- User can go to the Compliance Batch List page screen to view the newly created batch by selecting the appropriate filters

Compliance Batch List Page (189)

274 All selected All Batch Submitted To [Apply Filter](#)

Batch Creation Start 05/23/2020 Batch Creation End 05/28/2024 Batch ID

Batch Data Start Batch Data End

Select: All, All on Page, None

Batch ID	Batch Type	Batch Status	Submitted To	Batch CreationDate / Time	Batch Data Start	Batch Data End	Total Record Count	Rejected	% Success
<input type="checkbox"/> <a href="#">1350091</a>	274	Sent		06/08/2023 08:28:33			0	0	0%
<input type="checkbox"/> <a href="#">1350092</a>	274	Sent		06/08/2023 08:29:45			0	0	0%
<input type="checkbox"/> <a href="#">1350093</a>	274	Sent		06/08/2023 08:31:02			0	0	0%
<input type="checkbox"/> <a href="#">1350119</a>	274	Sent	Alpine	06/10/2023 04:34:15	06/22/2020	06/30/2023	7	0	0.00%
<input type="checkbox"/> <a href="#">1350120</a>	274	Sent	Alpine	06/10/2023 04:36:41	06/22/2020	06/30/2023	7	0	0.00%

- User can view details of the batch by clicking on the batch id hyperlink which will direct the user to Compliance Batch Details Page

Compliance Batch Details Page

[Download PDSRF](#) [Download Batch Summary](#)

**Batch Summary**

Batch ID 1350119 Batch Type 274  
 Batch Status Sent Reporting To Alpine  
 Batch Data Start Date 06/22/2020 Batch Data End Date 06/30/2023  
 Batch Created By Krishnegowda, Santhosh Batch Creation Date/Time 06/10/2023 04:34:15

**Batch Details**

Data Set Name	Total Records	Rejected Records	Accepted Records	File
274	7	0	0	<a href="#">ExportData-2023-6-10</a>

- From the Batch Detail Page user can click the hyperlink to the file in the Batch Details to download the export file

**Batch Details**

Data Set Name	Total Records	Rejected Records	Accepted Records	File
274	7	0	0	<a href="#">ExportData-2023-6-10</a>

## Accepting or Rejecting a Batch

Once the batch file has been sent to the appropriate entity, batches can be marked as accepted or rejected. To mark batches as accepted:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to 274, set other filters as appropriate.

3. Click Apply Filter
4. To accept multiple batches select the check boxes on the left, click All or All on Page.
5. Use the action dropdown and select Manually Accept Batch

Compliance Batch List Page (189)

274 All Batch Submitted To

Batch Creation Start: 05/23/2020 Batch Creation End: 05/28/2024 Batch ID

Batch Data Start Batch Data End

Action ★

- Action
- Regenerate Files
- Process Return File
- Manually Accept Batch**
- Manually Cancel Batch
- Manually Reject Batch

Select: All, All on Page, None

Batch ID	Batch Type	Batch Status	Submitted To	Batch CreationDate / Time	Batch Data Start	Batch Data End	Total Record Count	Rejected
<input checked="" type="checkbox"/> <a href="#">1350091</a>	274	Sent		06/08/2023 08:28:33			0	0
<input checked="" type="checkbox"/> <a href="#">1350092</a>	274	Sent		06/08/2023 08:29:45			0	0
<input checked="" type="checkbox"/> <a href="#">1350093</a>	274	Sent		06/08/2023 08:31:02			0	0
<input type="checkbox"/> <a href="#">1350119</a>	274	Sent	Alpine	06/10/2023 04:34:15	06/22/2020	06/30/2023	7	0
<input type="checkbox"/> <a href="#">1350120</a>	274	Sent	Alpine	06/10/2023 04:36:41	06/22/2020	06/30/2023	7	0

6. Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
7. In the Batch Summary section select Accepted from the Batch Status drop down

Compliance Batch Details Page Download PDSRF

**Batch Summary**

Batch ID	1350119	Batch Type	274
Batch Status	<span style="border: 1px solid #ccc; padding: 2px;">Sent</span>	Reporting To	Alpine
Batch Data Start Date	<span style="border: 1px solid #ccc; padding: 2px;">Sent</span>	Batch Data End Date	06/30/2023
Batch Created By	<span style="border: 1px solid #ccc; padding: 2px;">Accepted</span>	Batch Creation Date/Time	06/10/2023 04:34:15
	<span style="border: 1px solid #ccc; padding: 2px;">Rejected</span>		
	<span style="border: 1px solid #ccc; padding: 2px;">Cancelled</span>		

**Batch Details**

Data Set Name	Total Records	Rejected Records	Accepted Records	File
274	7	0	0	<a href="#">ExportData-2023-6-10</a>

To mark batches as rejected:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to 274, set other filters as appropriate.
3. Click Apply Filter

4. To reject multiple batches select the check boxes on the left, click All or All on Page.
5. Use the action dropdown and select Manually Reject batch
6. Rejecting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
7. In the Batch Summary section select Rejected from the Batch Status drop down.

Compliance Batch Details Page Download PDSRF

**Batch Summary**

Batch ID	1350119	Batch Type	274
Batch Status	<div style="border: 1px solid #ccc; padding: 2px;">             Sent              Accepted  <b>Rejected</b>              Cancelled           </div>	Reporting To	Alpine
Batch Data Start Date		Batch Data End Date	06/30/2023
Batch Created By		Batch Creation Date/Time	06/10/2023 04:34:15

**Batch Details**

Data Set Name	Total Records	Rejected Records	Accepted Records	File
274	2	0	0	<a href="#">ExportData-2023-6-10</a>

## Workflows for Setting Up and Collecting Data

### Provider Groups

#### Provider Group

Provider Group list page and detail page can be used by counties to create Provider Groups that are reportable for NACT and 274 file submissions. Provider Group data will be loaded into the system using a script that will take the state provided provider group txt file to populate the table. This data is then viewable/editable using the List Page and Detail Page. As new Provider Group files are received by the state these can continue to be uploaded using the script if needed.

Provider Group (2) ✕

Provider name  Legal Entity Number:  Substance Use Provider:  Apply Filter

Provider Group Id	Provider Group name	Legal Entity Number	Substance Use Provider
1	Group 1	5609345	Yes
2	Group 2	5241421	No

Alternatively, Provider Groups that may need to be added on a one off basis can be manually entered by clicking Create New in the toolbar which opens the Provider Group Direct entry Screen.

The following fields are required to set up the Provider Group for Reporting:

1. Provider Group Name
2. Legal Entity Number - required when Mental Health Provider = Y
3. Active Provider - Provider Groups where Active Provider = Y will be populated to a custom dropdown in the 274 Sites details screen where the User can link the Site to their respective Provider Group for reporting purposes.
4. Mental Health Provider - this is required for Mental Health Provider Groups
5. Substance Use Provider - this is required for Substance Use Provider Groups
6. NPI - requested but not required
7. Tax ID
8. Taxonomy Code
9. Contract Effective Date
10. Contract Expiration Date
11. Address fields
12. Ownership Type
13. County



## Provider Group Details

**Provider Group**

## Provider Group Sites

Provider Group Name	<input type="text" value="Test SUD Provider 1"/>
Legal Entity number	<input type="text"/>
Active Provider	<input checked="" type="checkbox"/>
Mental Health Provider	<input type="checkbox"/>
Substance Use Provider	<input checked="" type="checkbox"/>
NPI	<input type="text"/>
Tax Id	<input type="text" value="987654321"/>
Taxonomy Code	<input type="text" value="3 Taxonomy Code(s) Selected"/>
Contract Effective Date	<input type="text" value="07/01/2023"/> <input type="button" value="📅"/>
Contract Expiration Date	<input type="text" value="06/30/2024"/> <input type="button" value="📅"/>
Address	<input type="text" value="100 Anywhere St"/>
Suite	<input type="text"/>
City	<input type="text" value="Anywhere"/>
State	<input type="text" value="CA"/>
Zip Code	<input type="text" value="97123"/>
Maximum Number of Medi-Cal Beneficiaries Provider Group will accept	<input type="text" value="600"/>
Ownership Type	<input type="text" value="Not-For-Profit"/>
Name of CEO	<input type="text"/>
Name of CFO	<input type="text"/>
Ownership Code	<input type="text" value="Voluntary - Non-Profit - Religious Orga"/>
County	<input type="text"/>
American Indian Health Facility	<input type="checkbox"/>
<b>(Below fields are applicable only if this is an American Indian Health Facility)</b>	
Does your plan provide beneficiaries access to this provider, health center, or facility which does not contract with your MHP or DMC-ODS?	<input type="text"/>
Does your plan have a current contract in place with this provider, health center, or facility?	<input type="text"/>
Contact Date Reporting Month for Attempt to Contract	<input type="text"/>
Contact Date Reporting Year for Attempt to Contract	<input type="text"/>
Outcome of the Efforts or Reason for Declining Request to Contract with the MHP or DMC-ODS	<input type="text"/>

## Provider Group Sites

The Provider Group Sites tab displays a list of the 274 Sites associated with the Provider based on the set up completed in the 274 Sites and explained in more detail in the Sites section of this guide. The list includes the SiteID and SiteName for each Site associated with the Provider Group. Clicking the hyperlinked Site ID directs the user to the 274 Site Details if the user permissions allow. There is no set up or data entry completed in the Provider Group Sites tab

Provider Group Details	
Provider Group	Provider Group Sites
<b>Associated Sites</b>	
Site ID	Site Name
84	274SUDsite4

## Sites

For the 274 SUD, Sites are created using the 274 Sites Screen. To set up a Site navigate to the 274 Sites Screen and click the Create New icon or select a Site by clicking the Site ID. Making a Site as active and reportable for MH or SUD creates a 274 Site record which Staff User can be associated with via the Staff Custom Fields. This association is explained in more detail in the Providers (Staff) section of this guide. The following are part of the 274 Site data set. Required fields are indicated as such, otherwise the field is considered optional.

### 274 Site

1. Site is active and reportable for 274 MH - this is currently not being used but is future state
2. Site is active and reportable for 274 SUD - required to be considered as a Site in the 274 SUD file. This field will also drive conditional validations for 274 SUD fields.
3. 2100DA-NM1
  - a. Site Name - required field
  - b. Provider Group - required field
  - c. National Provider ID - requested
  - d. Site Tax ID Number - required field
4. 2100DA-N2
  - a. Facility Type - required field
  - b. Institutional Facility Type - conditionally required when Facility Type = 26, 27, 28, 31, 32, or 38
  - c. Site County Code - required field
  - d. Licensed Bed Count - required when 274 Facility Type = 27, 28, 31, 32, or 38
  - e. Available Bed Count - required when 274 Facility Type = 27, 28, 31, 32, or 38
  - f. Staffed Bed Count - required when 274 Facility Type = 27, 28, 31, 32, or 38
  - g. Teaching Facility Indicator - required field

- h. Maximum Number of Medi-Cal Members this Site will Accept - required field
  - i. Current Number of Medi-Cal Members Assigned to this Site - required field
  - j. Telehealth Indicator - required field
  - k. Language Line Available - required field
  - l. Age Groups Served - required field
  - m. Type of Service(for MHP only) - future state, conditionally required when Site is active and reportable for 274 MH is selected
  - n. Modality Type(for DMC-ODS only) - conditionally required when Site is active and reportable for 274 SUD is selected
5. 2100DA-PER
- a. Primary Site Phone - required field
  - b. Primary Site Email
  - c. Primary Site Fax
  - d. Primary Site URL
6. 2100DA-LUI
- a. Language Capacity - English - required field
  - b. Language Capacity - Arabic - required field
  - c. Language Capacity - Armenian - required field
  - d. Language Capacity - Cambodian - required field
  - e. Language Capacity - Cantonese - required field
  - f. Language Capacity - Farsi - required field
  - g. Language Capacity - Hmong - required field
  - h. Language Capacity - Korean - required field
  - i. Language Capacity - Mandarin - required field
  - j. Language Capacity - Other Chinese - required field
  - k. Language Capacity - Russian - required field
  - l. Language Capacity - Spanish - required field
  - m. Language Capacity - Tagalog - required field
  - n. Language Capacity - Vietnamese - required field
  - o. Language Capacity - American Sign Language (ASL) - required field
7. 2100DA-DTP
- a. Contract Effective Date - required field
  - b. Contract Expiration Date - required field
8. 2100DA-WS
- a. Site operates outside of normal business hours - if site operated within regular business hours leave checkbox unselected
  - b. Office Hours Code - required when Site operates outside of normal business hours is selected
  - c. Office Hours Start Time - required when Site operates outside of normal business hours is selected
  - d. Office Hours End Time - required when Site operates outside of normal business hours is selected
9. 2100DA-CRC

- a. Patient Acceptance Indicator - required field
  - b. ADA Compliant for Physical Plant - required field
10. 2100DA-N3,N4,LQ, and REF
- a. TDD/TTY Equipment Available - required field
  - b. Distance Between Site and Closest Public Transportation - required field
  - c. Site Address, City, State, and Zip Code - required field
  - d. Site Area of Specialization - required field
  - e. Site DEA
  - f. Facility ID(Provider Number) - required field
11. 2100DB-NM1 and N2
- a. This section includes an insert list to capture multiple Owners if more than one exists. At least one record must be inserted in order to save.
    - i. Ownership Code - required field
    - ii. Owner Name - required field
    - iii. Ownership Percentage - required field

### 274 Site

274 Site
Associated Programs
Associated Providers

Site is active and reportable for 274 MH
  Site is active and reportable for 274 SUD

#### 2100DA-NM1

Site Name	<input type="text" value="Test Site A"/>	Provider Group	<input type="text" value="Test SUD Provider 1"/>
National Provider ID	<input type="text"/>	Site Tax ID Number	<input type="text" value="456789012"/>

#### 2100DA-N2

Facility Type	Institutional Facility Type
<input type="text" value="SF - Satellite Site - Fixed"/>	<input type="text"/>
Site County Code	Licensed Bed Count
<input type="text" value="Alameda"/>	<input type="text"/>
Available Bed Count	Staffed Bed Count
<input type="text"/>	<input type="text"/>
Teaching Facility Indicator	Maximum Number of Medi-Cal Members this Site will Accept
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="text" value="200"/>
Current Number of Medi-Cal Members Assigned to this Site	Telehealth Indicator
<input type="text" value="176"/>	<input type="text" value="N - No provider uses telehealth at t"/>
Language Line Available	Age Groups Served
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="All Ages"/>
Type of Service (for MHP only)	Modality Type (for DMC-ODS only)
<input type="text" value="Select Type of Service"/>	<input type="text" value="1 Modality Type Selected"/>

#### 2100DA-PER

Primary Site Phone	Primary Site Email
<input type="text" value="(530) 123-4567"/>	<input type="text"/>
Primary Site Fax	Primary Site URL
<input type="text"/>	<input type="text"/>

**2100DA-LUI**

Language Capacity - English	<input type="text" value="N/A"/>	Language Capacity - Arabic	<input type="text" value="Certified"/>
Language Capacity - Armenian	<input type="text" value="Fluent"/>	Language Capacity - Cambodian	<input type="text" value="Good"/>
Language Capacity - Cantonese	<input type="text" value="Fluent"/>	Language Capacity - Farsi	<input type="text" value="Fluent"/>
Language Capacity - Hmong	<input type="text" value="Good"/>	Language Capacity - Korean	<input type="text" value="Good"/>
Language Capacity - Mandarin	<input type="text" value="Fluent"/>	Language Capacity - Other Chinese	<input type="text" value="Fair"/>
Language Capacity - Russian	<input type="text" value="Fluent"/>	Language Capacity - Spanish	<input type="text" value="Fluent"/>
Language Capacity - Tagalog	<input type="text" value="Fluent"/>	Language Capacity - Vietnamese	<input type="text" value="Fluent"/>
Language Capacity - American Sign Language (ASL)	<input type="text" value="Good"/>		

**2100DA-DTP**

Contract Effective Date	<input type="text" value="10/30/2023"/>	Contract Expiration Date	<input type="text" value="10/30/2023"/>
-------------------------	---	--------------------------	---

**2100DA-WS**

Site operates outside of normal business hours <input type="checkbox"/>	Office Hours Code	<input type="text" value="B Monday through Saturday"/>	
Office Hours Start Time	<input type="text" value="1:00 AM"/>	Office Hours End Time	<input type="text" value="3:00 AM"/>

**2100DA-CRC**

Patient Acceptance Indicator	<input type="text" value="Accepting New Patients"/>	ADA Compliant for Physical Plant	<input type="radio"/> Yes <input checked="" type="radio"/> No
------------------------------	---	----------------------------------	---

**2100DA-CRC**

Patient Acceptance Indicator 
 ADA Compliant for Physical Plant  Yes  No

**2100DA-N3,N4,LQ, and REF**

TDD/TTY Equipment Available  Yes  No
 Distance Between Site and Closest Public Transportation

Site Address 
 City

State 
 Zipcode

Site Area of Specialization

Site DEA 
 Facility ID (Provider Number)

**2100DB-NM1 and N2**

Ownership Code 
 Owner Name

Ownership Percentage

**Site Owners**
Insert
Clear

		Ownership Code	Owner Name	Ownership Percentage
X	<input type="radio"/>	03 Voluntary – multiple owners	Owner A	75
X	<input type="radio"/>	03 Voluntary – multiple owners	Owner B	20

## Associated Programs

In the associated Programs tab the SmartCare Programs that operate out of the same Site may be associated. This association triggers file logic that will look at data entered in the 274 Site tab as well as to Program (Administration) Custom Fields for certain Site fields and will report the greater value. For example, the 274 Site record indicates that the Site is Fluent in Cambodian, but a Program associated with that Site is Certified in Cambodian. The 274 SUD file will use the value of Certified.

The process of associating SmartCare Programs to 274 Sites is optional. If a Site exists independent of any Program then this tab will be left blank. Staff will still be able to be associated via the Staff Custom Fields which is explained in more detail in the Providers (Staff) section of this guide.

274 Site

274 Site   **Associated Programs**   Associated Providers

Associated Programs

- 1030 prog
- 274\_Groupprog1
- 274\_SUD\_Program4
- 274SUDsite1\_Program3
- AK\_Program
- Boo Caloms
- California FSP PAF\_Program
- CSI test program
- Final\_program\_1
- Final\_program\_2
- Main St - Adult Mental Health
- Main St - Case Management
- Main St - Psychiatric Services
- Maple Ave - Adult Mental Health
- Maple Ave - Child/Adolescent Mental Health Services
- Maple Ave - Psychiatric Services
- mytestprog
- namtestprg
- New Prog 1
- New\_program\_2
- New\_program1
- New\_program2
- New\_program3
- OSHPD Test
- Pro test
- Sample program
- SK\_Program\_site
- SK\_Program6
- SK\_Programsite1
- test 123456

## Associated Providers

The Associated Providers tab displays a list of the Staff User associated with the Site based on the set up completed in the Staff Custom Fields which is explained in more detail in the Providers (Staff) section of this guide. The list includes the Staff ID and Staff Name for each Provider associated with the Site. Clicking the hyperlinked Staff ID directs the user to the Staff Details if the user permissions allow. There is no set up or data entry completed in the Associated Providers tab

274 Site

274 Site	Associated Programs	Associated Providers																												
		<table border="1"> <thead> <tr> <th>Staff Id</th> <th>Staff Name</th> </tr> </thead> <tbody> <tr><td><a href="#">550</a></td><td>Admin, System</td></tr> <tr><td><a href="#">574</a></td><td>DoNotDelete, HL7 Lab Interface</td></tr> <tr><td><a href="#">577</a></td><td>Loftus, Diane</td></tr> <tr><td><a href="#">578</a></td><td>Shafiq, Syed</td></tr> <tr><td><a href="#">580</a></td><td>Ashok, Sheelu</td></tr> <tr><td><a href="#">581</a></td><td>Lindemann, Ashley</td></tr> <tr><td><a href="#">583</a></td><td>Walz, Jesse</td></tr> <tr><td><a href="#">585</a></td><td>Brydon, Jennie</td></tr> <tr><td><a href="#">587</a></td><td>Morrow, Katie</td></tr> <tr><td><a href="#">591</a></td><td>Mohan, Eati</td></tr> <tr><td><a href="#">592</a></td><td>CDK, Chandan</td></tr> <tr><td><a href="#">596</a></td><td>Admin, Kartik</td></tr> <tr><td><a href="#">598</a></td><td>Malipatil, Manjunath</td></tr> </tbody> </table>	Staff Id	Staff Name	<a href="#">550</a>	Admin, System	<a href="#">574</a>	DoNotDelete, HL7 Lab Interface	<a href="#">577</a>	Loftus, Diane	<a href="#">578</a>	Shafiq, Syed	<a href="#">580</a>	Ashok, Sheelu	<a href="#">581</a>	Lindemann, Ashley	<a href="#">583</a>	Walz, Jesse	<a href="#">585</a>	Brydon, Jennie	<a href="#">587</a>	Morrow, Katie	<a href="#">591</a>	Mohan, Eati	<a href="#">592</a>	CDK, Chandan	<a href="#">596</a>	Admin, Kartik	<a href="#">598</a>	Malipatil, Manjunath
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1 2 Next Last 1 ▾

## Programs

Setting up SC Programs to be reported under a Site is optional for 274 SUD but allows for grouping of programs if this is needed for a customer's data collection and workflow. To collect Program level data navigate to the Programs (Admin) and select the Program. In the Custom Fields tab the Program level fields are included in the NACT/274 Reporting section.

Selecting Medi-Cal reportable for 274 MH and Information Complete MH or SUD will include the program in the 274 Site > Associated Programs tab when the Program is not actively associated with another 274 Site.

All fields in this section are optional. When a Program is associated with a 274 Site the file will look at both the fields in the 274 Site and the associated Programs. When a Program includes a value that supersedes the value in the 274 Site the Program value will be included in the file. For example, the 274 Site > Language Capacity - Farsi field = N/A but a Program associated with the Site has a value of Certified for the same field. The file will report a value of Certified.



### Program Details

[General](#)
[Rules](#)
[Staff](#)
[Occupancy](#)
[Reporting](#)
[Claims](#)
[Custom Fields](#)

---

#### NACT/274 Reporting

Medi-Cal reportable for 274 MH and Information Complete  Reportable for 274 SUD and Information Complete

**2100DA – N2**

Teaching Facility Indicator  Yes  No      Telehealth Indicator

Licensed Bed Count       Available Bed Count

Staffed Bed Count       Language Line Available  Yes  No

Modality (for DMC-ODS only)       Age Group Served

**2100DA – LUI**

Language Capacity - English	<input type="text" value="Fluent"/>	Language Capacity - Arabic	<input type="text" value="N/A"/>
Language Capacity - Armenian	<input type="text" value="N/A"/>	Language Capacity - Cambodian	<input type="text" value="N/A"/>
Language Capacity - Cantonese	<input type="text" value="N/A"/>	Language Capacity - Farsi	<input type="text" value="N/A"/>
Language Capacity - Hmong	<input type="text" value="N/A"/>	Language Capacity - Korean	<input type="text" value="N/A"/>
Language Capacity - Mandarin	<input type="text" value="N/A"/>	Language Capacity - Other Chinese	<input type="text" value="Fluent"/>
Language Capacity - Russian	<input type="text" value="N/A"/>	Language Capacity - Spanish	<input type="text" value="Fluent"/>
Language Capacity - Tagalog	<input type="text" value="N/A"/>	Language Capacity - Vietnamese	<input type="text" value="N/A"/>
Language Capacity - American Sign Language (ASL)	<input type="text" value="N/A"/>		

**2100DA – WS**

Office Hours Code

Office Hours Start Time       Office Hours End Time

**2100DA – CRC**

Patient Acceptance Indicator       ADA Compliant for Physical Plant  Yes  No

**2100DA – N3, N4, LQ, and REF**

TDD/TTY Equipment Available  Yes  No

## Providers (Staff)

For the 274 SUD, Providers are set up using SmartCare Staff. To set up a Staff as a 274 Provider navigate to the Staff/Users Screen and select a Staff record. The following are part of the 274 SUD Provider data set. Required fields are indicated as such, otherwise the field is considered optional.

1. General
  - a. Active - required to include Staff in the 274 SUD File

- b. First and Last Name - required fields
- c. E-mail ID - required field

### Staff Details

General
Roles/ Permissions
Client Access Overrides
Demog

Time Sheet
Highly Qualified Teacher
Reporting
Custom Fields

#### Staff

Active
  Supervisor

First Name

Middle Name

Last Name

Display As

Phone Number

Fax

E-mail ID

Last Visit 11/27/2023 07:02 AM

2. Demographic/Profession

- a. Date of Birth - required field
- b. License # - required field
- c. Taxonomy Code - required field
- d. National Provider Id - requested but not required
- e. DEA Number

### Staff Details

General
Roles/ Permissions
Client Access Overrides
Demographic/ Professional
Proc/ Prog/ Loc/ Proxy/ Supervisor
Productivity
Staff Preferences

Time Sheet
Highly Qualified Teacher
Reporting
Custom Fields

#### Demographic Information

Date Of Birth

Race

Language

SSN  [View...](#)

Employment Start

Employment End

#### Professional

License #

Taxonomy Code

National Provider Id

DEA Number

Signing Suffix

Co-Signer  Always Default

Authorized Provider

3. License/Degree

- a. License Degree/Type - required field
- b. License # - required field
- c. State - required field
- d. Start Date - required field
- e. Expiration Date - note that historical licenses require an expiration date that is prior to the start of the reporting period. A Provider cannot have two active licenses during the reporting period

Staff Details

General Roles/ Permissions Client Access Overrides Demographic/ Professional Proc/ Prog/ Loc/ Proxy/ Supervisor Productivity Staff Preferences

Time Sheet Highly Qualified Teacher Reporting Custom Fields

License/Degree Information

License Type/ Degree  License #  State   Billing

Start Date  Expiration Date

Notes

License History  Show Active Only

	License Type/ Degree	License #	Start Date	Expiration Date	Billing	Primary License	Notes
<input checked="" type="checkbox"/>	DEA	DE234567891	10/09/2020	11/17/2024	No	No	
<input checked="" type="checkbox"/>	NPI	8765432190	10/09/2020	11/17/2024	No	No	
<input checked="" type="checkbox"/>	Clinical Nurse Spec...	MD45678	10/09/2020	11/17/2025	Yes	No	

4. Custom Fields NACT/274 Reporting

- a. Staff is reportable to NACT/274 and Information is complete - MH: This checkbox must be selected in order for the Staff record to be pulled into the 274 MH file.
- b. Staff is reportable to NACT/274 and Information is complete - SUD: This checkbox must be selected in order for the Staff record to be pulled into the 274 SUD file.
- c. 274 – All Providers
  - i. Language Capacity - Arabic - required field
  - ii. Language Capacity - Armenian - required field
  - iii. Language Capacity - Cambodian - required field
  - iv. Language Capacity - Cantonese - required field
  - v. Language Capacity - English - required field
  - vi. Language Capacity - Farsi - required field
  - vii. Language Capacity - Hmong - required field

- viii. Language Capacity - Korean - required field
- ix. Language Capacity - Mandarin - required field
- x. Language Capacity - Other Chinese - required field
- xi. Language Capacity - Russian - required field
- xii. Language Capacity - Spanish - required field
- xiii. Language Capacity - Tagalog - required field
- xiv. Language Capacity - Vietnamese - required field
- xv. Language Capacity - American Sign Language (ASL) - required field
- xvi. Contract Effective Date - required field
- xvii. Contract Expiration Date - required field
- xviii. Cultural Competence Training - required field
- xix. Type of Board Certification
- xx. Provider Gender - required field
- xxi. Provider Profit Status - required field
- xxii. Professional Affiliation
- xxiii. Affiliated NPI
- xxiv. Additional Affiliated NPI

Staff Details

General	Roles/ Permissions	Client Access Overrides	Demographic/ Professional	Proc/ Prog/ Loc/ Proxy/ Supervisor	Productivity	Staff Pre
Time Sheet	Highly Qualified Teacher	Reporting	Custom Fields			

**NACT/274 Reporting**

Staff is reportable to NACT/274 and Information is complete  MH  SUD

**274 – All Providers**

Language Capacity - Arabic	N/A	Language Capacity - Armenian	N/A
Language Capacity - Cambodian	N/A	Language Capacity - Cantonese	N/A
Language Capacity - English	Certified	Language Capacity - Farsi	N/A
Language Capacity - Hmong	N/A	Language Capacity - Korean	N/A
Language Capacity - Mandarin	N/A	Language Capacity - Other Chinese	N/A
Language Capacity - Russian	N/A	Language Capacity - Spanish	Fluent
Language Capacity - Tagalog	N/A	Language Capacity - Vietnamese	N/A
Language Capacity - American Sign Language (ASL)	N/A	Contract Effective Date	09/01/2023
Contract Expiration Date	09/01/2024	Cultural Competence Training	<input type="radio"/> Yes <input checked="" type="radio"/> No
Type of Board Certification		Provider Gender	F = Female
Provider Profit Status	01 = 501(C)(3) Non-profit	Professional Affiliation	
Affiliated NPI		Additional Affiliated NPI	

d. 274 – MH Providers

- i. Mental Health Provider Area of Expertise - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.
- ii. Mental Health Provider Practice Focus - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.
- iii. Service Type - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.

- iv. Telehealth Indicator - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.
- v. Field-Based Services Indicator - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.
- vi. Distance Provider Travels to Field based services - required when Staff is reportable to NACT/274 and Information is complete - MH is selected and Field-Based Services Indicator = Yes.
- vii. Maximum Number of Medi-Cal Members this Provider will Accept-Children - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.
- viii. Maximum Number of Medi-Cal Members this Provider will Accept-Adults
- ix. Accepting New Patients Indicator - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.
- x. Sees Children Indicator - required when Staff is reportable to NACT/274 and Information is complete - MH is selected.

**274 – MH Providers**

Mental Health Provider Area of Expertise	<input type="text" value="C = Child/Adolescent"/>	Mental Health Provider Practice Focus	<input type="text" value="Delirium, Dementia, an..."/>
Service Type	<input type="text" value="Mental Health Services"/>	Telehealth Indicator	<input type="text" value="0 – Services from this provic"/>
Field-Based Services Indicator	<input type="radio"/> Yes <input checked="" type="radio"/> No	Distance Provider Travels to Field based services	<input type="text"/>
Maximum Number of Medi-Cal Members this Provider will Accept-Children	<input type="text" value="6"/>	Maximum Number of Medi-Cal Members this Provider will Accept-Adults	<input type="text" value="0"/>
Accepting New Patients Indicator	<input checked="" type="radio"/> Yes <input type="radio"/> No	Sees Children Indicator	<input type="text" value="N = Does not see Children"/>

- e. 274 – SUD Providers
  - i. Modality (DMC-ODS) - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.
  - ii. Telehealth Indicator - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.
  - iii. Field-Based Services Indicator - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.
  - iv. Distance Provider Travels to Field based services - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected and Field-Based Services Indicator = Yes.
  - v. Maximum Number of Medi-Cal Members this Provider will Accept-Children - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.
  - vi. Maximum Number of Medi-Cal Members this Provider will Accept-Adults - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.
  - vii. Accepting New Patients Indicator - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.

- viii. Sees Children Indicator - required when Staff is reportable to NACT/274 and Information is complete - SUD is selected.

**274 – SUD Providers**

Modality (DMC-ODS)	<input type="text" value="Intensive Outpatient T..."/>	Telehealth Indicator	<input type="text" value="E – Services at this site are ;"/>
Field-Based Services Indicator	<input type="radio"/> Yes <input checked="" type="radio"/> No	Distance Provider Travels to Field based services	<input type="text"/>
Maximum Number of Medi-Cal Members this Provider will Accept-Children	<input type="text" value="0"/>	Maximum Number of Medi-Cal Members this Provider will Accept-Adults	<input type="text" value="6"/>
Accepting new patients Indicator	<input checked="" type="radio"/> Yes <input type="radio"/> No	Sees Children Indicator	<input type="text" value="N = Does not see Children"/>

- f. NACT Providers
  - i. Licensing Entity
  - ii. California Professional Certification Number
  - iii. Waivered Provider
  - iv. Registered Provider
  - v. Direct Service Offered by Provider
  - vi. Board Certified Psychiatrist
  - vii. Age Group(s) served
  - viii. Hours of cultural competence training completed
  - ix. Satellite Site Address
  - x. Frequency of provider using satellite site

**NACT Providers**

Licensing Entity	<input type="text"/>	California Professional Certification Number	<input type="text"/>
Waivered Provider	<input type="radio"/> Yes <input type="radio"/> No	Registered Provider	<input type="radio"/> Yes <input type="radio"/> No
Direct Service Offered by Provider	<input type="radio"/> Yes <input type="radio"/> No	Board Certified Psychiatrist	<input type="radio"/> Yes <input type="radio"/> No
Age Group(s) served	<input type="text"/>	Hours of cultural competence training completed	<input type="text"/>
Satellite Site Address	<input type="text"/>	Satellite Address City	<input type="text"/>
Satellite State	<input type="text"/>	Satellite Zip Code	<input type="text"/>
Frequency of provider using satellite site	<input type="text"/>	Satellite Used to Meet Time and Distance Standards?	<input type="radio"/> Yes <input type="radio"/> No
Provider Type	<input type="text" value="Provider Type (SMHS) ..."/>		

5. NACT/274 Multiple Sites/Program Reporting and SUD 274 Site Reporting. These sections are used for associating Staff Providers to the Site that they are reported under. Selecting a Program Name and Active will include the Staff as a Provider for that Site in the 274 file.

- a. NACT 274 Multiple Site/Program Reporting - this section is used for associating a staff to a MH Program for 274 or NACT reporting
  - i. Program 1 (repeat for 2-5 as needed) - at least one Program selection is required when Staff is reportable to NACT/274 and Information is complete MH = Y
  - ii. Active - required to include Staff as a Provider for the respective Site



- iii. FTE - required field when Active is selected
- iv. FTE - Adults - required field when Active is selected
- v. FTE - Children - required field when Active is selected
- b. SUD 274 Site Reporting - this section is used for associating a staff to a SUD Site for 274 or NACT reporting
- c. Site 1 (repeat for 2-5 as needed) - at least one Site selection is required when Staff is reportable to NACT/274 and Information is complete SUD = Y

NACT 274 Multiple Site/Program Reporting								
Program 1	ACCESS MHS ADULT LA CLI	<input type="checkbox"/> Active	FTE	50.00	FTE - Adults	0	FTE - Children	50
Program 2		<input type="checkbox"/> Active	FTE	50.00	FTE - Adults	25	FTE - Children	25
Program 3		<input type="checkbox"/> Active	FTE		FTE - Adults		FTE - Children	
Program 4		<input type="checkbox"/> Active	FTE		FTE - Adults		FTE - Children	
Program 5		<input type="checkbox"/> Active	FTE		FTE - Adults		FTE - Children	
			Total	0				

SUD 274 Site Reporting	
Site 1	Test Site A
Site 2	Test Site C
Site 3	
Site 4	
Site 5	

## Fee For Service Providers (FFS)

A FFS provider is an individual who provides services on behalf of the county. The recommended setup for this group of providers:

1. Create a Provider Group, Site, and Program that is named Fee For Service.
  - a. Set the NPI number as the County NPI number.
  - b. For the other fields of data such as office hours,
2. Associate all of the FFS staff underneath this provider group, site, and program.

## Existing Staff records in the Nightly Job

The nightly job takes the information from the Staff Details screen and creates or updates an entry in the Provider Staff data. The nightly job completes the following checks and steps to decide whether to Insert a new Provider Staff or update an existing Provider Staff.

1. The job checks if there is a match with the existing staff data based on SSN, NPI, OR DOB + First name, Last name.
2. If a match is found, the system will record-delete the old record and insert the new record



3. If an existing record is found and has a Staff Id tied to it, then the system updates those Id's to the new record after performing step 1.
4. If no match is found, the job simply inserts the new record.

The data for the Provider Staff list page for 274 reporting is populated by a job that is scheduled to run nightly. This job automatically extracts SmartCare Staff data and inserts that into the new Provider Staff upload screens. For the extracted Staff, the system will check their associated Programs for the Site details. And, as for the Provider organization details, the system will look for the Provider Group associated with each Program. Through a custom field available on the Program details screen, the user can set up the Programs by associating them to the Provider Groups that each Program belongs to. See Provider Groups section of this document for details on adding/modifying a Provider Group.

If there are errors on the Provider Staff Data, updates are made in the Staff Details screen. This is then pushed to Provider Staff via the job. (If in a crunch and you cannot run the job, please see below for how to manually view and update the Provider Staff records. But note, if you manually update the Provider Staff records, you must also update the Staff Details screen. Otherwise, the job will overwrite what you manually update.)

## File Logic

### File logic for 274 SUD:

1. For the Provider Group section in 274 SUD, consider the Organizations that are entered in the Provider Group list page where the 'Active Provider' checkbox is selected, Substance Use Provider' checkbox is checked and Contract Expiration Date is greater than the start of the reporting period.
2. Include the 274 Sites where Site is active and reportable for 274 SUD is selected and Contract Expiration Date is greater than the start of the reporting period.
3. For the Provider detail records, include Staff where Active = Yes, Staff is reportable to NACT/274 and Information is complete - SUD is selected and Contract Expiration Date is greater than the start of the reporting period.
4. The file should be extracted in a 274 .dat format.

### File logic for 274 MH:

1. For the Provider Group section in 274, consider the Organizations that are entered in Provider Group list page where the 'Active Provider' checkbox is selected and 'Mental Health Provider' checkbox is checked and exclude the Provider Groups that have the American Indian Health Facility checkbox checked
2. For Sites, below is the Exclusion logic:





- a. Exclude the Sites/Programs that do not have the custom field Medi-Cal checkbox checked
3. For the Provider detail section, Smartcare staff data will be collected in the Provider Staff details screen, with an exclusion of those Staff who have a staff degree mapped to the Recode XNACT274StaffDegrees. (This recode category is used to exclude staff from 274 reporting. The recode set up is noted below in this user guide.) In addition, the staff record must also have the following requirements met to be included:
  4. In Staff Details the following must be true: Active = Yes during reporting period, Custom Fields, Staff is reportable to NACT/274 and Information is complete must be selected, Contract Effective Date is greater than reporting period Start Date.
  5. The file should be extracted in a 274 .dat format.

## Manual Upload/Entry of Provider Staff

The Provider Staff Uploads Screen is also available in SmartCare. This is an alternative method for entering staff information to complete NACT/274 reporting, which is manual upload, entry or modification from the Provider Staff screens. This section outlines this.

To open the 'Provider Staff Uploads' list page from 'My Office' to view existing Provider staff uploads/County Staff records, search in the Search list for Provider Staff Uploads screen.

Provider Staff Uploads (4)

Uploaded From  
 Uploaded To  
Apply Filter

Providers 
 Uploaded By

Upload Id	File Name	Provider	Total Records	Uploaded Date	Uploaded By	Source
<a href="#">1</a>		Test Orgnaization	1		Mabray, Erin	Manual entry
<a href="#">2</a>	TEST - 11 02 2022.xlsx	Test Orgnaization	1	11/02/2022	Admin, System	Excel file
<a href="#">3</a>		Provider Neha - Facility MH	2		Sonkamble, Neha	Manual entry
<a href="#">5</a>	TEST - 11 02 2022.xlsx		1	11/02/2022	Admin, System	Excel file



- Direct entry icon to manually enter Staff records into the system

The Upload Id hyperlink in the above list page will take the user to the Provider Staff Details page where the list of Staff records against that Job extract will be displayed

### Provider Staff Details (2)

Staff ID	Upload Id	Provider Organization	Associated Site(s)	First Name	Middle Initial	Last Name	SSN
<a href="#">3</a>	3	Provider Neha - ...	4,6	Staff First	A	Staff Last	*****3131
<a href="#">4</a>	3	Provider Neha - ...	5	test first	M	Test last	*****5454

Clicking on the Staff Id hyperlink will take the user to the DFA screen where data for that staff will be displayed. For manual entry of Staff, click on the Direct entry icon in the above list page and manually enter the data for new Providers. The same Direct Entry DFA screen can be used to modify details of existing staff records.

### OIG Staff Direct Entry

[Create Rendering Provider](#) [Create SC login](#)

OIG Standing	<input type="text"/>
Entered By	<input type="text" value="Sankamble, Neha"/>
Associated Site(s)	<input type="text"/>
SmartCare Staff Id	<input type="text"/>
SmartCare Rendering Provider Id	<input type="text"/>
Provider Organisation	<input type="text"/>
NPI	<input type="text"/>
SSN	<input type="text"/>
Facility ID	<input type="text"/>
Monitoring End Date	<input type="text"/> <input type="text"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Former Last Name	<input type="text"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>

This screen also enables the user to create a Rendering Provider/SmartCare login for a particular staff by clicking on the Buttons at the top. Updates in the Direct entry screen will be reflected in the Smartcare Staff/Provider record if the Staff record has a Smartcare Login/Rendering Provider created

# Logic for How the Screen Filters

## Provider Staff Details screen

Provider Staff Details (1)

All Staff Statuses  All Providers  All Rendering Provider Status  Staff Name  SSN  Upload Id

Entered by Staff  All SmartCare Login Status  All Staff OIG Standing  10/01/2023  10/31/2023

Associated Site(s)  Associated Program(s)  274 SUD

Staff ID	Upload Id	Provider Organization	Associated Site(s)	Associated Program(s)	First Name	Middle Initial	Last Name	SSN	Status	Staff Entered Date	Rendering Provider?	SmartCare Login?
3	3				Erin		Mabrey		Staff with errors	05/21/2023		579

Below is how the filters work

Name	Parameter Type	Parameter Options	Description	Default Value
All Staff Statuses	dropdown	All Staff Statuses Staff with errors Staff with current record	Populate with all the dropdown options in the previous column. Below is what each selection means: All Staff Statuses: Display all staff data based on other filter values Staff with errors: Only display records with errors Staff with current record: Only display records	All Staff Statuses
Provider	dropdown	Display list of providers that the logged in staff is permitted to.	Based on this filter selection, display Staff data entries that were made only by that provider	All Providers
SSN	numeric		Filter based on SSN data in the record	
Upload Id	textbox		Filters based on Upload Id	
Entered by Staff	dropdown	Display all staff	Filter based on staff who uploaded/entered data	All Staff
From Date	date		From and To date of staff the were eligible for reporting within the range	
To Date	date		From and To date of staff the were eligible for reporting within the range	
Renderin	Dropdown	All Statuses	In the excel file or manual entry a Staff record	

g Provider Status		<p>Requested = Column = Y and Rendering Provider ID is NULL.</p> <p>Not Requested = Column = N</p> <p>Created = a Rendering Provider ID is linked to the record</p> <p>Reviewed and Accepted = Rendering Provider Request Status field on the DFA is set to Reviewed and Accepted</p> <p>Reviewed and Rejected = Rendering Provider Request Status field on the DFA is set to Reviewed and Rejected</p>	<p>will be set to ' Rendering Provider Login' either Yes or No. If set to Yes, the User is asking the County staff to allow a Rendering PProvider be created for the staff record.</p> <p>The County Staff User will then filter for Requested statuses using this filter. Review and if they approve creating a Rendering Provider, will set the 'Rendering Provider Request Status' field to 'Reviewed and Accepted' and will use the Tool/button in the toolbar to create a Rendering Provider. Once this is done, the Rendering Provider's Provider ID will be linked to this Staff record. And now the filter for the record would be Created because the Request column = Y and now there is a Provider ID linked.</p> <p>If the user selects 'Reviewed and Rejected', the user should not be able to create a Rendering Provider from the toolbar.</p>	
SmartCar e Login Status	Dropdown	<p>All Statuses</p> <p>Requested = Column = Y and SmartCare Login is NULL.</p> <p>Not Requested = Column = N</p> <p>Created = a Staff ID is linked to the record</p> <p>Reviewed and Accepted = SmartCare Login Status field on the DFA is set to Reviewed and Accepted</p> <p>Reviewed and Rejected = SmartCare Login Status field on the DFA is set to Reviewed and Rejected</p>	<p>In the excel file or manual entry a Staff record will be set to 'Request SmartCare Login' either Yes or No. If set to Yes, the User is asking the County staff to allow a SmartCare login to be created for the staff record.</p> <p>The County Staff User will then filter for Requested statuses using this filter. Review and if they approve creating a SmartCare login will use the Tool in the toolbar to create a SmartCare login. Once this is done, the Staff ID will be linked to this Provider Staff record. And now the filter for the record would be Created because the Request column = Y and now there is a Staff ID linked.</p> <p>If the user selects 'Reviewed and Rejected', the user should not be able to create a SmartCare Login from the toolbar.</p>	
OIG Standing	Dropdown	<p>All Staff</p> <p>Good Standing</p> <p>Bad Standing</p>	<p>Using the Field in the Provider SStaff Direct Entry - filter for when the field is set to Good Standing or set to Bad Standing.</p>	

Staff name	searchable dropdown /textbox	This field should search uploaded Staff/Provider record based on their Firstname/Lastname	Use can filter for a particular staff/provider by entering their firstname/lastname
File Type	Dropdown	NACT MH NACT SUD 274 MH 274 SUD OIG	This filter is required and will return a list of records of staff eligible for the selected file type. This will display that staff included in the file for the given date range.

## System Setup

The following must be setup prior to adding staff via the workflows noted above in this user guide. The set up is recommended to occur in this order:

1. Set the Provider Groups - see Workflow for Setting Up and Collecting Data section of this guide for more details
2. Set the 274 Sites and link to Provider Groups - see Workflow for Setting Up and Collecting Data section of this guide for more details
3. External Mapping for Degrees Global Code Category
4. Set the Recodes (based on standard Global Code set up for Degrees Global Code Category)
5. System Configuration Keys - Determine the settings and set up the System Configuration Keys
6. Job Configuration - Confirm the Job is configured
7. Roles and Permissions
8. Staff Details Screen- see Workflow for Setting Up and Collecting Data section of this guide for more details

## External Mapping

External mappings used when Global Code Categories are used by multiple areas of the system. To prevent conflicting values used in the code fields within the Global Code Category Details the external mappings table can hold multiple mapping values for one category to be used under different scenarios. For the SUD 274 the DEGREE category must be set up with an external code, this is where the file will pull the License Type for each Staff. For each DEGREE global code record (RecordID = Global Code ID), a record must be inserted to this table with the appropriate External Code. Alternatively, customers can provide their Implementation Team with a mapping of values which can be loaded to their environment.

Table Editor

Table: ExternalMappings Top 100 Execute

Order By: ExternalMappingId ExternalMappingId ExternalMappingId Save

SQL Query: `SELECT TOP 100 * FROM externalmappings where purpose like '%274%' ORDER BY ExternalMappingId`

Category	TableName	RecordId	ExternalCode	ExternalCodeDescription	RecordCode	Adc
DEGREE	GlobalCodes	25198	CSW	LCSW Licensed Clinical	LCSW Licensed Clinical	
DEGREE	GlobalCodes	25199	LVN	LVN Licensed Vocational	LVN Licensed Vocational	
DEGREE	GlobalCodes	25200	MFT	MFT Marriage and Family	MFT Marriage and Family	
DEGREE	GlobalCodes	25201	PCC	LPCC Licensed Professional	LPCC Licensed Professional	
DEGREE	GlobalCodes	25202	MHR	MHRS Mental Health Re	MHRS Mental Health Re	
DEGREE	GlobalCodes	25203	OCT	OT Occupational Therap	OT Occupational Therap	
DEGREE	GlobalCodes	25204	MD	MD Medical Doctor	MD Medical Doctor	
DEGREE	GlobalCodes	25205	OTH	Other Qualified Provider	Other Qualified Provider	
DEGREE	GlobalCodes	25206	CNS	CNS Clinical Nurse Spec	CNS Clinical Nurse Spec	
DEGREE	GlobalCodes	25208	NPA	NP Nurse Practitioner	NP Nurse Practitioner	
DEGREE	GlobalCodes	25209	NRS	RN Registered Nurse	RN Registered Nurse	
DEGREE	GlobalCodes	25210	NAS	PA Physician Assistant	PA Physician Assistant	

## System Configuration Keys

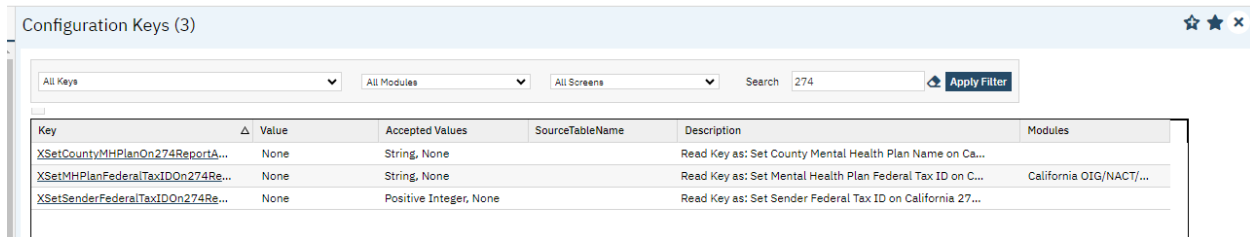
System Configuration keys are set up in the Configuration Keys banner in SmartCare's Administration tab. The Key name can be filtered on. Then opening to the detail page allows the user to modify the Value field as indicated below. Then Saving the screen will update the information.

Configuration Key Name	Description	Value to Enter
XSetSenderFederalTaxID On274ReportAsKeyValue	This key is to hold the Sender's Federal Tax ID. Do not include hyphens in the Tax ID	Sender's Federal Tax ID. This will be used to report 274
XSetCountyPlanOn274ReportAsKeyValue	This key holds name of the County Plan submitting the network data	Enter the name of the Plan submitting the network data as specified in the file name.  This value will be concatenated with the appropriate suffix in the 274 MH (-MHP) or 274 SUD (-DMC-ODS) files.

		If an plan manages more than one county, include the name of each county separated with a dash (e.g. Sutter-Yuba-MHP)
XSetSUDPlanFederalTaxIDOn274ReportAsKeyValue	Enter the County Plans Federal Tax ID (9 digits - no hyphens) + HCP (3 digits)	Enter the County Plans Federal Tax ID (9 digits - no hyphens) + HCP (3 digits) This will be used to report 274 SUD
XSetMHPlanFederalTaxIDOn274ReportAsKeyValue	Enter the County Plans Federal Tax ID (9 digits - no hyphens) + HCP (3 digits)	Enter the County Plans Federal Tax ID (9 digits - no hyphens) + HCP (3 digits) This will be used to report 274 MH

To set up the configuration key:

1. Search for the Screen named Configuration Keys by typing this screen name in the search
2. Open the List page
3. In the first filter you can filter for the Key name from the table above
4. Click Apply Filter
5. Click on the Key name in the list results below the filters.



Key	Value	Accepted Values	SourceTableName	Description	Modules
XSetCountyMHPlanOn274ReportA...	None	String, None		Read Key as: Set County Mental Health Plan Name on Ca...	
XSetMHPlanFederalTaxIDOn274Rs...	None	String, None		Read Key as: Set Mental Health Plan Federal Tax ID on C...	California OIG/NACT/...
XSetSenderFederalTaxIDOn274Re...	None	Positive Integer, None		Read Key as: Set Sender Federal Tax ID on California 27...	

6. In the Detail page, confirm the Value field is the correct value per the table above
7. Click Save in the toolbar to save changes made

Configuration Key Details  Allow Edit

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**Configuration Keys**

Key:

SourceTableName:

Module:

Screen:

Value:  None

Description: 
 Read Key as: Set Sender Federal Tax ID on California 274 Report As The Key Value  
  
 When the value of the key "XSetSenderFederalTaxIDOn274ReportAsKeyValue" is set to anything other than None, then the Sender Federal Tax ID value that is set for this key will be displayed in the 274 Report.  
  
 When the value of the key "XSetSenderFederalTaxIDOn274ReportAsKeyValue" is set to "None", then the Sender Federal Tax ID will not be displayed in the 274 Report.  
  
 Example : Sender Federal Tax ID will be 10-digit integer (i.e., 1234567989)

Comments:

## Jobs to be Setup

Streamline Systems analysts will setup the following Jobs to run automatically in the system:

### Job Name 1: SmartCareStaffDataIntoProviderUploadJob

1. The stored procedures that will be called when the job runs:
  - a. ssp\_InsertUpdateCaliforniaSmartCareStaffJob
  - b. ssp\_InsertProviderStaffUploadBySmartCareStaffJob
  - c. ssp\_UpdateProviderStaffUploadBySmartCareStaffJob
2. How often the job runs: Nightly
3. Logic of the job: This job runs nightly to extract Staff data from Smartcare Staff table and add/update entries in the Provider staff screen

Jobs are set up by technical staff in the SQL database. The end user can view the SQL Jobs which are set up. The list page is called SQL Jobs. The Enabled column is set to Yes when a job is set up per the steps indicated below. The job name to look for is



'SmartCareStaffDataIntoProviderUploadJob.' If you do not see this job and do not see Enabled = Yes then create a support ticket for the technical team members to verify.



## SQL Jobs

Name	Schedule Detail	Enabled
DACSCalifornia - Automatic Flag: Rx pres...	Occurs every day at 00:00:00.Schedule will be used starting on 2022-07-...	Yes
DACSCalifornia - California MMEF File Load	Occurs on Day of every 1 month at 00:30:00.Schedule will be used startin...	No
DACSCalifornia - California MMEF File Load	Occurs on Day of every 1 month at 00:30:00.Schedule will be used startin...	No
DACSCalifornia - California MMEF Updates	Occurs every day at 04:20:00.Schedule will be used starting on 2022-10-...	Yes
DACSCalifornia - California MMEF Updates	Occurs every day at 04:20:00.Schedule will be used starting on 2022-10-...	Yes
DACSCalifornia - California MMEF Updates	Occurs every day at 04:20:00.Schedule will be used starting on 2022-10-...	Yes
DACSCalifornia - Clear Needs-To-Be-Wor...	Occurs every day at 06:15:00.Schedule will be used starting on 2022-08-...	Yes
DACSCalifornia - executessp_processPDF	Occurs every day at 00:00:00.Schedule will be used starting on 2021-06-...	Yes
DACSCalifornia - executessp_processPDF	Occurs every day at 00:00:00.Schedule will be used starting on 2021-06-...	Yes
DACSCalifornia - Generate USCDI File	Occurs every day at 00:30:00.Schedule will be used starting on 2022-10-...	No
DACSCalifornia - Insert Treatment Team ...	Occurs every day at 01:00:00.Schedule will be used starting on 2022-04-...	Yes
DACSCalifornia - RemoveClientFlagsWhe...	Occurs every day at 00:45:00.Schedule will be used starting on 2022-01-...	Yes
DACSCalifornia - SmartCareStaffDataInto...	Occurs every day at 00:10:00.Schedule will be used starting on 2018-01-...	No

## Roles and Permissions

Below are the roles and permissions needed for users to access the screens where data is entered and submissions are generated

Screen Name	Purpose
Provider Group List/Detail page	This screen is used to view, set up and modify Provider Group records to be included in the 274 files.
274 Site	This screen is used to view, set up and modify 274 Site to be included in the 274 SUD file.
Programs (Admin)	This screen is used to view, set up and modify Programs that are reported as 274 MH Sites or Programs reported as part of 274 SUD sites.
Staff/Users	This screen is used to view, set up and modify Staff records that are included as

	Providers in the 274 files.
Provider Staff Details	This screen is used to review Staff that are eligible for reporting and compiling the 274 files.

## Go Live Considerations:

Once this setup is complete, then consider how to populate the Custom Fields data for each staff record. This data must be present in order for a staff record to be reportable. So it needs to be present within the first month of going live.

## Post Go Live Considerations:

Set up to consider with the Post Go Live Considerations:

1. Establish a workflow that each time a staff record is created the staff's custom field data is collected and entered into SmartCare.
2. Establish a workflow that each time a new Program is created, the program customer field data is collected and entered into SmartCare.
3. If additional Program Groups are created, consider set up to Programs and if any existing programs need to be set to the new Program Groups. If so, make those updates in the Program's Custom Fields.



## Version Control

<b>Revision Date</b>	<b>Description</b>	<b>Updated By</b>
7.12.24	Updated batch accept/reject workflow	Neha
8.2.24	Added Manual Upload/Entry of Provider Staff	bschaefer