



Software for Realizing Care's Potential

# FLORIDA DEPARTMENT OF ELDER AFFAIRS

## PROVIDER MANAGEMENT

Version 1.1

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Date: November 19, 2021

1-855-WELLSKY

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**Document Tracking**

Versions			
Version	Author/Editor	Date	Changes
1.0	M. Reed	10/29/2021	Document Creation
1.1	M. Reed	11/08/2021	Added Rate Change Utility

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## Provider Management

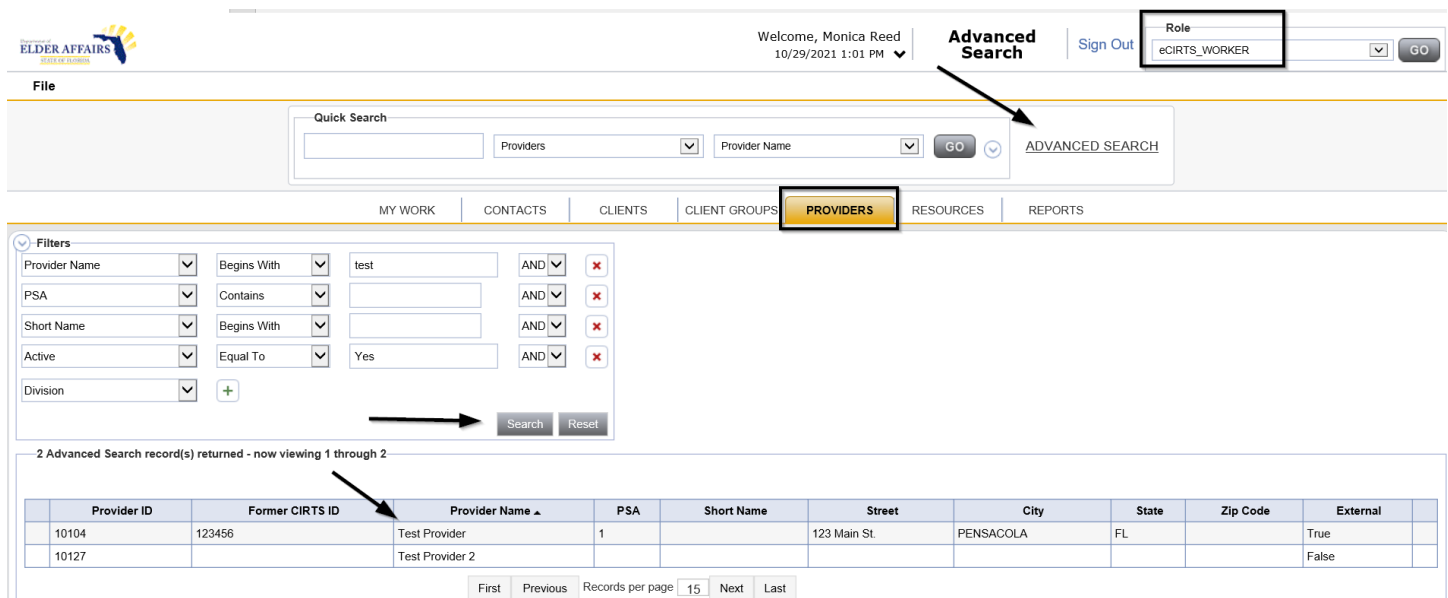
The Providers chapter stores information about every individual or agency that provides a service to a client. Providers include the programs affiliated with the agency, private providers, and public agencies. The Provider data will be populated into eCIRTS via data conversion.

The Providers chapter also contains information about the workers associated with a provider, the specific services offered by a provider, rates, and other contract-related details.

When you open the Provider's chapter, a search page opens. You can locate a provider's record using information about the provider.

### Searching for a provider record

1. Select your assigned role that has access to the Provider Chapter and click **Go**.
2. Click on the **Providers** Chapter.
3. Select Advanced Search, enter the Provider Name and any other criteria in the search. Click **Search**.
4. Select the Providers name from the List View grid.



ELDER AFFAIRS  
STATE OF FLORIDA

Welcome, Monica Reed  
10/29/2021 1:01 PM

Advanced Search | Sign Out | Role: eCIRTS\_WORKER

File

Quick Search: [ ] Providers [ ] Provider Name [ ] GO [ ] ADVANCED SEARCH

MY WORK | CONTACTS | CLIENTS | CLIENT GROUPS | **PROVIDERS** | RESOURCES | REPORTS

Filters

Provider Name [ ] Begins With [ ] test [ ] AND [ ] [X]

PSA [ ] Contains [ ] [ ] AND [ ] [X]

Short Name [ ] Begins With [ ] [ ] AND [ ] [X]

Active [ ] Equal To [ ] Yes [ ] AND [ ] [X]

Division [ ] + [ ]

[ ] Search [ ] Reset

2 Advanced Search record(s) returned - now viewing 1 through 2

Provider ID	Former CIRTS ID	Provider Name ▲	PSA	Short Name	Street	City	State	Zip Code	External
10104	123456	Test Provider	1		123 Main St.	PENSACOLA	FL		True
10127		Test Provider 2							False

First Previous Records per page 15 Next Last

## Demographics

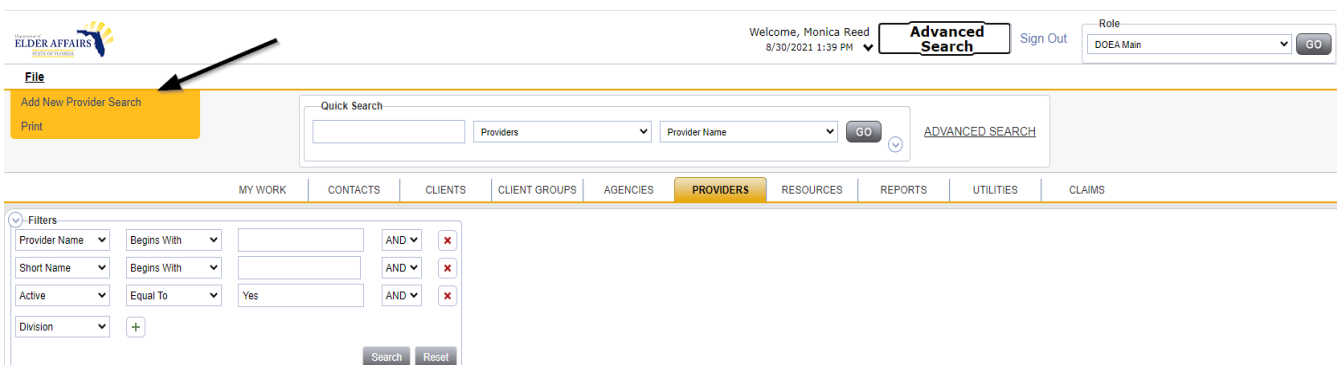
The Provider's page is the landing page when opening a Providers record. The Provider's tab contains the basic demographic information on service providers and programs. The Provider's tab will display basic information about that provider.

Legacy Provider - LOC ID		123456	
Test Provider (10104)			
Provider ID Numbers		Linked Providers	
Service Area			
<b>Providers</b>	Divisions	Workers	Services
Referrals/Notifications	Authorizations	Contracts	Notes
Agencies			
<b>Basic Information</b>			
Provider Name	Test Provider	Provider Type	
Short Name		External	Yes
Legacy Provider-LOC ID	123456	Comment	
Active	Yes		
<b>Physical Location</b>			
Contact Name		Zip Code	
Street	123 Main St.	Phone	
Street 2		Extension	
City	PENSACOLA	Email	
State	FL	Website	

## Adding a provider

You will create new Provider records in eCIRTS within the Provider Chapter.

1. Open the Providers Chapter
2. Select **File > Add New Provider Search**. The Provider Search Page will open. You must search for any existing Providers first before you can add any new records. This helps to prevent duplicates in the application.



The screenshot shows the eCIRTS application interface. At the top, there is a navigation bar with the 'PROVIDERS' tab selected. Below the navigation bar, there is a search bar with a 'GO' button and an 'ADVANCED SEARCH' link. To the left of the search bar, there is a 'File' menu with 'Add New Provider Search' highlighted by a black arrow. Below the search bar, there is a filter section with the following filters:

Provider Name	Begins With		AND	X
Short Name	Begins With		AND	X
Active	Equal To	Yes	AND	X
Division				

At the bottom of the filter section, there are 'Search' and 'Reset' buttons.

3. **Search** for an existing Provider record first. If the provider already exists, click on the target record from the list view to open the record and make any necessary modifications. If zero records are returned, select **Add New**.

File

Filters

Provider Name Begins With Provider S AND x

Provider Name +

Search Reset Add New

0 record(s) returned

4. At a minimum, complete the following fields on the Provider details page: Required fields are marked with a red asterisk (\*)
  - a. Initial Division = defaults to AG and is read only
  - b. Provider Name = Will populate with what you entered in the Provider Search. Update as needed
  - c. Active = Yes (checked)
  - d. External = Yes (checked)
  - e. Additional Attributes = Multi select (select as needed)

ELDER AFFAIRS

Welcome, Monica Reed | Provider  
8/30/2021 1:48 PM

File Edit

**Basic Information**

Initial Division \* AG

Provider Name \* Provider S

Short Name

Medicaid ID

Legacy Provider-LOC ID

EIN

Individual Provider

Facility Type

External

Exclude from Selection

Comments

Additional Attributes \*
 

- Access Point
- CCE Lead Agency
- Focal Point
- Local Support Providers
- Minority Provider
- OAA
- Senior Center

Active

**Physical Location**

Contact Name

Street

Street 2

City

State

Zip Code

County

PSA

Phone

Extension

Fax Number

Email

Website

**Mailing Address**

Mailing Name

Mailing Contact Name

Mailing Street

Mailing Street 2

Mailing City

Mailing State

Mailing Zip Code

Mailing Phone

**Additional Information**

Allow Auth Overlap

Allow Enroll Overlap

Allow Recurring Enrollment Overlap

4. From the **File** menu, select **Save and Close Provider**. An eCIRTS generated Provider ID will have been created for this provider. The Provider ID is required in the Provider Activity Import file and is part of the <SubmitterID>
5. The **Division** details page automatically displays. Update the following fields:
  - a. Division = defaults to AG and is read only
  - b. Status = Open
  - c. Status Date = the date you are opening the record. Make this date earlier than any activity record you plan to import. We've been using 1/1/2020 or 1/1/21.

**File**

<b>Division</b>	<b>Division Details</b>	
	Division *	AG
	Status *	Open
	Status Date	01/01/2021
	Open Date	01/01/2021

5. From the **File** menu, select **Save and Close Division**.

### Edit a provider

You will be able to edit the basic Provider information which includes the provider's name, number, contact information and address.

1. Open the provider record in the Providers Chapter. Select the Providers tab if necessary.
2. Select File > Edit Provider from the file menu and the details page opens.
3. Update any fields as needed.
4. From the **File** menu, select **Save and Close Provider** when complete.

**File Edit**

<b>Provider</b>	<b>Basic Information</b>	
Addresses	Provider Name *	Test Provider
Telephone Number(s)	Short Name	
	Parent Vendor/Lead Agency	<input type="text"/> Clear
	Medicaid ID	
	Legacy Provider-LOC ID	123456
	EIN	
	Active	<input checked="" type="checkbox"/>
	Individual Provider	<input type="checkbox"/>
	Facility Type	
	External	<input checked="" type="checkbox"/>
	Exclude from Selection	<input type="checkbox"/>
	Comments	
	Additional Attributes *	<input type="text"/> OAA <input type="checkbox"/> Access Point <input type="checkbox"/> CCE Lead Agency <input type="checkbox"/> Focal Point <input type="checkbox"/> Local Support Providers <input type="checkbox"/> Minority Provider <input type="checkbox"/> Senior Center
	<b>Physical Location</b>	
	Contact Name	
	Street	123 Main St.
	Street 2	
	City	PENSACOLA
	State	FL
	Zip Code	
	County	ESCAMBIA
	PSA	1
	Phone	
	Extension	
	Fax Number	
	Email	
	Website	
	<b>Mailing Address</b>	
	Mailing Name	
	Mailing Contact Name	
	Mailing Street	
	Mailing Street 2	
	Mailing City	
	Mailing State	
	Mailing Zip Code	
	Mailing Phone	
	<b>Additional Information</b>	
	Allow Auth Overlap	<input checked="" type="checkbox"/>
	Allow Enroll Overlap	<input checked="" type="checkbox"/>
	Allow Recurring Enrollment Overlap	<input checked="" type="checkbox"/>

### Provider Addresses

Provider addresses will appear on the Addresses subpage along with other addresses of the same type. There can be several addresses for each of the Contact, Mailing and Correspondence types. There can be one address type selected as primary which will then display on the main provider page under the specific section for that address type.



## Add Provider addresses

1. Open the provider record. Select the Providers tab.
2. Select **File > Edit Provider**. The Provider detail page opens.
3. Add the Provider address information in the following two sections:

### Contact Address (Physical Location)

This section contains the address for the provider's physical location.

Physical Location			
Contact Name	<input type="text"/>	PSA	1 <input type="text"/> <input type="button" value="Clear"/>
Street	123 Main St.	Phone	<input type="text"/>
Street 2	<input type="text"/>	Extension	<input type="text"/>
City	PENSACOLA <input type="button" value="Clear"/>	Fax Number	<input type="text"/>
State	FL <input type="button" value="Clear"/>	Email	<input type="text"/>
Zip Code	<input type="text"/> <input type="button" value="Clear"/>	Website	<input type="text"/>
County	ESCAMBIA <input type="button" value="Clear"/>		

### Mailing Address

This section contains the address for mailing purposes.

Mailing Address			
Mailing Name	<input type="text"/>	Mailing City	<input type="text"/> <input type="button" value="Clear"/>
Mailing Contact Name	<input type="text"/>	Mailing State	<input type="text"/> <input type="button" value="Clear"/>
Mailing Street	<input type="text"/>	Mailing Zip Code	<input type="text"/> <input type="button" value="Clear"/>
Mailing Street 2	<input type="text"/>	Mailing Phone	<input type="text"/>

4. To save additional provider addresses, select **Addresses** from the left-hand navigation menu.



Test Provider  
11/3/2021 5:47 PM

---

**File**

Provider

**Addresses**

Telephone Number(s)

Filters

Address Type

1 Addresses record(s) returned - now viewing 1 through 1

Address Type	Primary	Street	Street2	City	State	Zip Code	Active
Contact	True	123 Main St.		PENSACOLA	FL		True

Records per page

5. The Addresses list view page opens. Existing addresses are shown in the list view grid. To edit an existing address, select it from the list view grid.
6. Select **File > Add Address** to add a new address.

**File**

---

**Section 1**

Address Type \*

Primary

Street

Street2

City

State

Zip Code

Start Date

End Date

Active

Comments

7. Complete the address information. Select **File > Save and Close Address** when complete.



**Note:** In order for the address to appear on the Provider detail page the Address Type must be Contact or Mailing and the record must be marked as the primary address and active.

If the address type dropdown includes additional address types such as billing and the address is associated to that type, it will not display on the Provider detail page. The address will only appear on the Address subpage.

## Provider Telephone Numbers

Provider records can include many different telephone numbers. The phone numbers are saved in the Telephone number subpage in the Provider record.

### Add Provider telephone numbers

1. Open the provider record. Select the Providers tab.
2. Select **File > Edit Provider**. The Provider details page open.
3. To add a phone number via the detail page, locate the phone number field and enter the number.
4. Select **File > Save Provider** when done. When you save the provider record, the phone numbers will be listed on the Telephone Number(s) subpage.
5. To add a phone number via the Telephone Number(s) subpage, select **Telephone Number(s)** from the left hand navigation. The Telephone Numbers list view page opens. Phone numbers added via the detail page will be displayed in the list view. To edit a phone number, select it from the list view.

**File**

---

Provider

Addresses

**Telephone Number(s)**

Filters

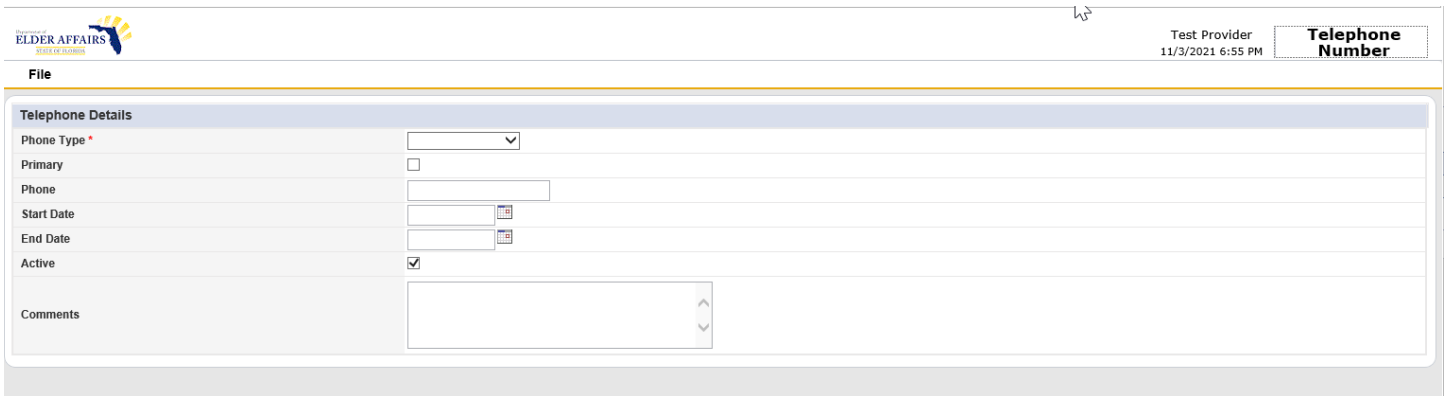
Phone Type

1 Telephone Number(s) record(s) returned - now viewing 1 through 1

Phone Type	Phone	Active	Primary
Phone	(999)999-9999	True	True

First Previous Records per page 15 Next Last

6. To add a phone number, select **File > Add Telephone Number**. The Telephone Number page opens.

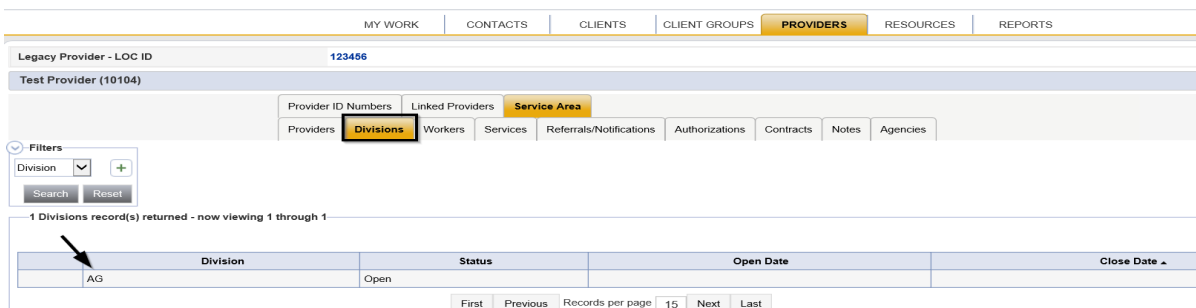


7. Complete the telephone number information. Required fields are marked with a red asterisk (\*)
8. Select **File > Save and Close Telephone Number** when finished.

## Division

The Division tab lists all Divisions to which the provider is open. A provider or program has to be opened to a division in order for clients to be enrolled or for services to be delivered. If you need to view the existing Division record then complete the following steps.

1. Open the Provider record and select the Division tab.
2. Select the Division record that you want to view from the list view grid.



Division	Status	Open Date	Close Date
AG	Open		

3. The Division Details page opens.

**File**

---

Division

Division Details	
Division *	AG
Status *	Open
Status Date	01/01/2020
Open Date	

4. The Division page elements include:
  - a. **Division\***: All Providers will be associated with AG.
  - b. **Status\***: This field is used to track the status of the Provider within the Division. The Provider will need to be in an Open status in order to deliver services.
  - c. **Status Date**: This field is used to record the date for the status.
  - d. **Open Date**: The date the Division is open to the Provider.

## Workers

The Workers tab contains information about employees of the provider. Each employee is entered into the system individually. Workers must have a worker record associated to a provider to have access to records in eCIRTS. Other worker information you can capture in this tab include the worker’s supervisor name, worker credentials, experience, and basic demographic data. These are the people that will be delivering the services on behalf of the Provider. The eCIRTS generated <Member ID> for each of these workers is required in the Provider Activity Import file and are the people that delivered the services to the client.

1. To view the Workers tab, open the Provider record and select the Workers tab. Existing worker records, if any, are shown in the list view grid

Quick Search  
 Providers  Provider Name

Legacy Provider - LOC ID **123456**

Test Provider (10104)

Provider ID Numbers Linked Providers Service Area  
 Providers Divisions **Workers** Services Referrals/Notifications Authorizations Contracts Notes Agencies

Filters  
 Member ID

2 Workers record(s) returned - now viewing 1 through 2

Worker Name	Title	Phone Number	Work Phone	Cell Phone	Active	Provider Worker Active	Supervisor Name
Reed, Monica	System Administrator	(850)555-5555			True	True	Buck, Jennifer
Test, Stacy					True	True	

First Previous Records per page 15 Next Last

## Adding a worker

Before you can add a new worker record, you must conduct a search to make sure that the worker doesn't already exist. This helps to prevent duplicate records. Provider workers will be added into eCIRTS via the initial data conversion. If the Provider needs a new worker added, the user will follow the steps outlined below.

### To add a worker to the Provider record.

1. Open the Provider record and select the Workers tab.
2. Select **File > Add New Worker Search**. The Worker Search page opens.

Filters  
 Last Name  Equal To  AND   
 First Name  Begins With  OR   
 Last Name

3. Enter in the Search criteria and click Search.
4. To add a worker who already exists, select the checkbox at the end of the record row. Select Add Worker to Provider under the Tools Menu. Don't click on the Worker's name. That will take you to the worker details page which is not where you add the Worker to the Provider.

ELDER AFFAIRS  
STATE OF FLORIDA

Test Provider | Worker Search  
10/29/2021 1:34 PM

File Tools

Filter Add Worker to Provider

Last Name Equal To reed AND  
First Name Begins With OR  
Last Name +

Search Reset Add New

2 Worker Search record(s) returned - now viewing 1 through 2

Last Name	First Name	Member ID	Relation	Primary Provider
Reed	Monica	157	No	DOEA - DEPARTMENT OF ELDER AFFAIRS
Reed	Hannah	291	No	DOEA - DEPARTMENT OF ELDER AFFAIRS

First Previous Records per page 15 Next Last

- To edit the existing worker record, select it from the list view grid. The Worker record opens.
- To add a new record, select **Add New**. The Worker page opens.

ELDER AFFAIRS  
STATE OF FLORIDA

Test Provider | Worker  
11/2/2021 2:37 PM

File

Workers

Member ID

Worker Type

First Name \* Stacy

Last Name \* Jacobs

Title

Street 123 Main St.

Street 2

City PENSACOLA Clear

State FL Clear

Zip Code Clear

Phone

Work Phone

Mobile Phone

Email

Start Date

End Date

Supervisor

Primary Provider

Exclude

Active

- Complete the worker information. Any information you entered in the worker search filter will pre-populate in the worker detail screen.
- Select **File > Save and Close Worker** when done. An eCIRTS generated Member ID has been assigned to this worker. The worker has been added to the Provider's record.

### Editing a worker

- Open the Provider record and select the Workers tab.
- Select the worker's record from the list view grid. If necessary, use the filters to locate the worker record. The Worker page opens.
- Edit the worker information as needed. Select **File > Save and Close Worker** when done.

**File**

- Worker**
- Providers
- Supervisors
- Positions

Workers	
Member ID	157
Worker Type	Agency Administrator
First Name *	Monica
Last Name *	Reed
Title	System Administrator
Street	ADRC address
Street 2	ADRC address 2
City	Tallahassee <input type="button" value="Clear"/>
State	FL <input type="button" value="Clear"/>
Zip Code	32301 <input type="button" value="Clear"/>
Phone	(850)555-5555
Work Phone	
Mobile Phone	
Email	monica@email.com
Start Date	01/01/2020 <input type="button" value="Calendar"/>
End Date	<input type="button" value="Calendar"/>
Supervisor	Buck, Jennifer
Primary Provider	DOEA - DEPARTMENT OF ELDER AFFAIRS <a href="#">Details</a>
Exclude	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

### Deactivating or excluding a worker

When a worker leaves your organization, you will want to make that worker inactive to prevent the worker from accessing the application and to remove that worker’s name from the worker search popup or worker dropdown lists throughout the application.

Current records with the worker’s name will remain in place. If the worker is associated with multiple providers, you will make that worker inactive for all providers when you make the current worker record inactive.

To exclude an active worker from displaying in the various Worker dropdown lists, select the “Exclude from List” option in the worker record. The exclude option will allow the worker record to still be active so the user can still access the application, but the worker’s name will not display in the worker search or dropdown lists. When a worker who has been excluded from the worker dropdown list adds a record to the application and that field is set to default to the current worker, their name will still display in the field.

### To mark a worker as inactive or excluded

1. Open the Provider record and select the Workers tab.
2. Select the worker’s record from the list view grid. The Worker page opens.
3. To deactivate a worker, clear the “Active” option. Inactive workers are automatically not included in the worker dropdown lists throughout eCIRTS. If the worker is associated with multiple providers when the record is deactivated the worker will be inactive for all providers.

**File**

Workers	
Member ID	<input type="text"/>
Worker Type	<input type="text" value="v"/>
First Name *	<input type="text" value="Stacy"/>
Last Name *	<input type="text" value="Jacobs"/>
Title	<input type="text"/>
Street	<input type="text" value="123 Main St."/>
Street 2	<input type="text"/>
City	<input type="text" value="PENSACOLA"/> <input type="button" value="v"/> <input type="button" value="Clear"/>
State	<input type="text" value="FL"/> <input type="button" value="v"/> <input type="button" value="Clear"/>
Zip Code	<input type="text"/> <input type="button" value="v"/> <input type="button" value="Clear"/>
Phone	<input type="text"/>
Work Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
Email	<input type="text"/>
Start Date	<input type="text"/> <input type="button" value="calendar"/>
End Date	<input type="text"/> <input type="button" value="calendar"/>
Supervisor	<input type="text" value="v"/>
Primary Provider	<input type="text"/>
Exclude	<input type="checkbox"/>
Active	<input type="checkbox"/>

- To exclude an active worker from displaying in the various Worker dropdown lists in eCIRTS, select the “Exclude” option. This action will allow the worker record to still be active so the user can still access the application but will not display in the worker search or dropdown lists.
- Select **File > Save and Close Worker** when done.



**File**

Worker	<b>Workers</b>	
Providers	<b>Member ID</b>	157
Supervisors	<b>Worker Type</b>	Agency Administrator ▼
Positions	<b>First Name *</b>	Monica
	<b>Last Name *</b>	Reed
	<b>Title</b>	System Administrator
	<b>Street</b>	ADRC address
	<b>Street 2</b>	ADRC address 2
	<b>City</b>	Tallahassee ▼ <span style="background-color: #ccc; padding: 2px 5px;">Clear</span>
	<b>State</b>	FL ▼ <span style="background-color: #ccc; padding: 2px 5px;">Clear</span>
	<b>Zip Code</b>	32301 ▼ <span style="background-color: #ccc; padding: 2px 5px;">Clear</span>
	<b>Phone</b>	(850)555-5555
	<b>Work Phone</b>	
	<b>Mobile Phone</b>	
	<b>Email</b>	monica@email.com
	<b>Start Date</b>	01/01/2020 <span style="font-size: small;">📅</span>
	<b>End Date</b>	<span style="font-size: small;">📅</span>
	<b>Supervisor</b>	Buck, Jennifer
	<b>Primary Provider</b>	DOEA - DEPARTMENT OF ELDER AFFAIR <a href="#">Details</a>
	<b>Exclude</b>	<input type="checkbox"/>
	<b>Active</b>	<input checked="" type="checkbox"/>

**Adding and editing a supervisor**

The worker’s supervisor is a significant piece of information in eCIRTS. Many options, like notes are editable by both a worker and the worker’s supervisor. Outstanding ticklers are visible to a worker’s supervisor.

A worker can have one or more supervisors but only one supervisor can be flagged as the primary supervisor. The primary supervisor is the worker who will see the worker’s ticklers in the My Work chapter.

**To add or edit a worker supervisor**

1. Open the Provider record and select the Workers tab.
2. Select the worker’s record from the list view grid. The Worker page opens.
3. Select the name of the worker’s supervisor from the dropdown list. The Supervisor field is not a required field.
4. When you add the supervisor and save the record, the supervisor field will become read-only. Use the Supervisors subpage to change or edit the supervisor.
5. You can add additional supervisors on the Supervisor subpage. The Supervisor subpage is available after you save the Worker record. Select Supervisors from the left-hand navigation.

**File**

- Worker
- Providers
- Supervisors
- Positions

Workers	
Member ID	<input type="text" value="157"/>
Worker Type	<input style="border-bottom: 1px solid black;" type="text" value="Agency Administrator"/>
First Name *	<input type="text" value="Monica"/>
Last Name *	<input type="text" value="Reed"/>
Title	<input type="text" value="System Administrator"/>
Street	<input type="text" value="ADRC address"/>
Street 2	<input type="text" value="ADRC address 2"/>
City	<input type="text" value="Tallahassee"/> <span style="float: right;">▼ Clear</span>
State	<input type="text" value="FL"/> <span style="float: right;">▼ Clear</span>
Zip Code	<input type="text" value="32301"/> <span style="float: right;">▼ Clear</span>
Phone	<input type="text" value="(850)555-5555"/>
Work Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
Email	<input type="text" value="monica@email.com"/>
Start Date	<input type="text" value="01/01/2020"/> <span style="float: right;">📅</span>
End Date	<input type="text"/> <span style="float: right;">📅</span>
<b>Supervisor</b>	<input type="text" value="Buck, Jennifer"/>
Primary Provider	DOEA - DEPARTMENT OF ELDER AFFAIRS <a href="#">Details</a>
Exclude	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

**File**

- Worker
- Providers
- Supervisors
- Positions

Filters Search

1 Supervisors record(s) returned - now viewing 1 through 1

Supervisor Name	Primary	Start Date	End Date ▲
Buck, Jennifer	Yes	08/23/2019	

First Previous Records per page  Next Last

6. Select **File > Add Supervisor**. The Supervisor Details page opens.

**File**

Supervisor

Supervisor	
Supervisor Name *	Buck, Jennifer
Start Date *	08/23/2019 <input type="text"/>
End Date	<input type="text"/>
Primary Supervisor	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>

7. Select the Supervisor name from the dropdown. Complete the Supervisor information as needed. Required fields are marked with a red asterisk.
8. Select **File > Save and Close Supervisor** when done.



**Note:** If you need to change the primary supervisor, add the new supervisor, and select the primary field for that supervisor. When you save the worker record, the former primary supervisor is still show as a supervisor, but the primary option is clear.

### Adding a provider to the worker record

The Providers list view page shows the providers with whom the worker has been associated. When you add a worker to a provider record, that provider name is automatically captured on this page. Add more provider records to capture additional worker experience and associations.

When you add a provider to the worker record using the Worker Provider page, the worker will also appear on the new Provider’s Worker page. You must give workers access to import the provider activity file for this provider and access to view the import error logs.

### To add a provider to the worker record

1. Open the Provider record and select the Workers tab.
2. Select the worker’s record from the list view grid. The Worker page opens.
3. Select Providers from the left-hand navigation. The Providers list view page opens. Existing provider records, if any, are show in the list view. Select the **name of the Provider** for which this Worker should have access to import files if applicable.

**File**

Worker

Providers

Supervisors

Positions


Filters

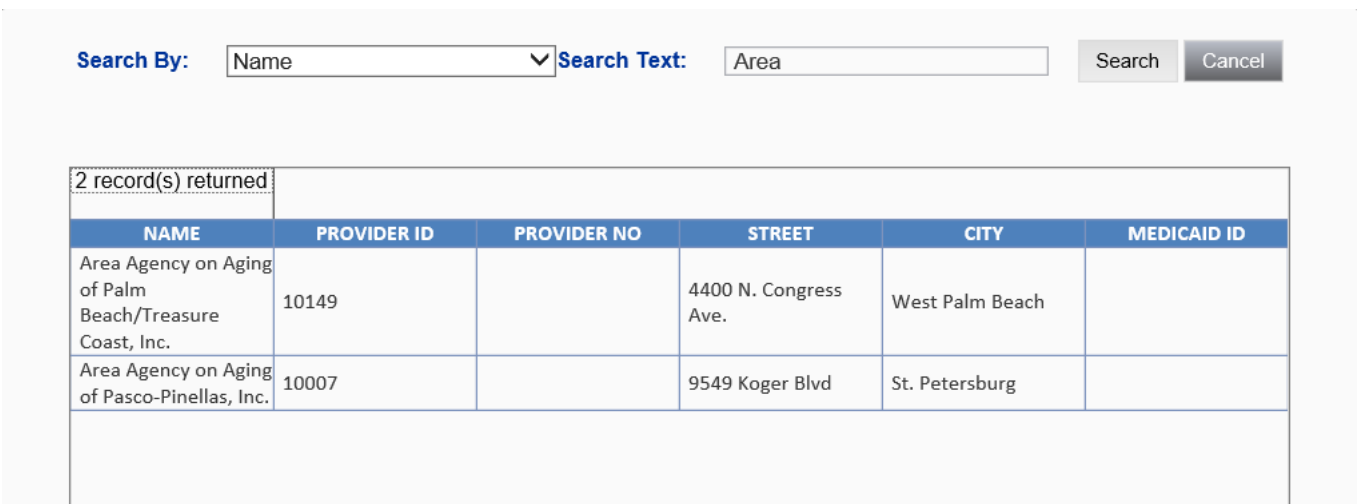
19 Providers record(s) returned - now viewing 1 through 15

Provider Name	Active <span style="font-size: small;">▲</span>	
Area Agency on Aging of Pasco-Pinellas, Inc.	No	
DOEA - DEPARTMENT OF ELDER AFFAIRS	Yes	
Aging and Disability Resource Center of Broward County, Inc.	Yes	
All Services Provider	Yes	

4. Select File > Add Worker Provider from the menu. The Worker Provider Details page opens.



5. Use the Provider name search ellipsis (  ) to search for the provider's name. The Provider search popup opens.
  - a. Select the search criteria from the Search By dropdown.
  - b. Type the search criteria in the Search text bar.
  - c. Click Search
  - d. Select the provider's name from the search results.



2 record(s) returned					
NAME	PROVIDER ID	PROVIDER NO	STREET	CITY	MEDICAID ID
Area Agency on Aging of Palm Beach/Treasure Coast, Inc.	10149		4400 N. Congress Ave.	West Palm Beach	
Area Agency on Aging of Pasco-Pinellas, Inc.	10007		9549 Koger Blvd	St. Petersburg	

6. Select **Upload HIPAA Files** if this worker should be able to upload Provider Activity Import files for this provider.
7. Select **Download HIPAA Files** if this worker should be able to download and view the import error logs.
8. Complete the worker provider information. Required fields are marked with a red asterisk.
9. Select **File > Save and Close Worker Provider** when done.

### Deactivating a worker from a provider

If you want to mark a worker as inactive for a specific provider, you will need to edit the Provider subpage information in the Worker record.



**Note:** You cannot make the primary provider inactive. To mark this provider as inactive, you must first mark another provider as the primary provider.

## To mark a worker as inactive for a specific provider

1. Open the Provider record and select the Workers tab.
2. Select the worker's record from the list view grid. The Worker page opens.
3. Select Providers from the left-hand navigation. The Providers list view page opens.

File

Worker

Providers

Supervisors

Positions

Filters

Search Reset

19 Providers record(s) returned - now viewing 1 through 15

Provider Name	Active
Area Agency on Aging of Pasco-Pinellas, Inc.	No
DOEA - DEPARTMENT OF ELDER AFFAIRS	Yes
Aging and Disability Resource Center of Broward County, Inc.	Yes
All Services Provider	Yes

4. Select the provider from the list view grid. The Worker Provider page opens.
5. Clear the Active option checkbox.
6. Select File > Save and Close Worker Provider when done.
7. The worker will no longer see any members that are associated to the provider when the Active field is cleared if the worker's role permissions are set, and the Show Discharged Clients Field is cleared.

File

Worker Provider

Worker Provider

Provider Name \* DOEA - DEPARTMENT OF ELDER AFFAIRS Details

Active

Upload HIPAA Files

Download HIPAA Files

Primary Provider

File

Roles

Welcome, Monica Reed 11/2/2021 3:20 PM

Role Name \* eCIRTS\_ADMIN

Enhanced ADA

Active

Permissions

Available Permissions

Case Manager

Custom Form Admin

Reviewer1

Reviewer2

Add All >>

Add >

< Remove

<< Remove All

Role Permissions

Administrator

Approver

SSN Unmask

Supervisor

Fund Codes

Available FundCodes

Role FundCodes

AG

Dashboards

Assigned Group \* DOEA Main

Access Level \* All

Two Part Only

Allow Cross Program Access

Search

People Search Program Access

Show Participating Flag

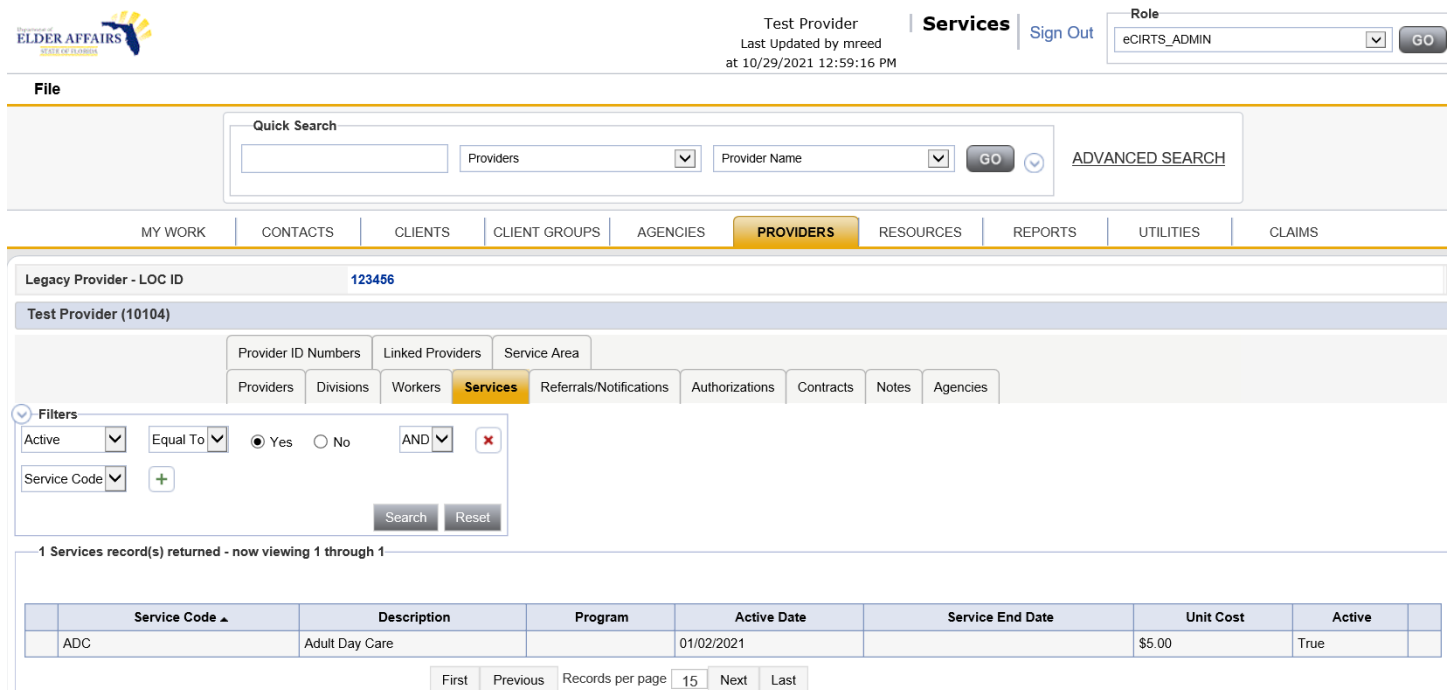
Show Discharged Clients

## Services

The Services tab is where you can record the services that a provider would offer to the community. To establish provider services in eCIRTS use the Service Code utility to create services and then link each service to the program or provider. A client must be enrolled with a program or provider before services can be recorded in authorizations or activities for a client.

### To view the Services tab

1. Open the Provider record and select the Services tab.
2. Existing services, if any, are shown in the list view grid.



The screenshot shows the eCIRTS interface for a provider record. At the top, there is a header with the "ELDER AFFAIRS" logo, user information for "Test Provider" (Last Updated by mreed at 10/29/2021 12:59:16 PM), and navigation options for "Services" and "Sign Out". A "Role" dropdown menu is set to "eCIRTS\_ADMIN". Below the header is a "File" menu and a "Quick Search" bar with fields for "Providers" and "Provider Name", a "GO" button, and a link to "ADVANCED SEARCH". The main navigation bar includes tabs for "MY WORK", "CONTACTS", "CLIENTS", "CLIENT GROUPS", "AGENCIES", "PROVIDERS" (highlighted), "RESOURCES", "REPORTS", "UTILITIES", and "CLAIMS". The provider record details show "Legacy Provider - LOC ID 123456" and "Test Provider (10104)". Below this are tabs for "Provider ID Numbers", "Linked Providers", "Service Area", "Providers", "Divisions", "Workers", "Services" (highlighted), "Referrals/Notifications", "Authorizations", "Contracts", "Notes", and "Agencies". A "Filters" panel is open, showing "Active" set to "Yes", "Equal To" selected, and "Service Code" with a plus sign. The search results show "1 Services record(s) returned - now viewing 1 through 1". A table displays the service record:

Service Code	Description	Program	Active Date	Service End Date	Unit Cost	Active
ADC	Adult Day Care		01/02/2021		\$5.00	True

At the bottom of the table, there are pagination controls: "First", "Previous", "Records per page 15", "Next", and "Last".

### To add Services to the provider record

1. Open the Provider record and select the Services tab.
2. Select **File > Add Services**
3. The Add Services page will open in a new window. Enter the necessary information in the appropriate fields.

**File**

**Service**

Division: AG

ServiceID \* [ ]

Service Code [ ]

Unit Type [ ]

Service Description [ ]

Program: AC, ADJ, CA3B, CA3C, CA3D, CA3E, CCE

Secondary Code \* [ ]

Active Date \* 11/02/2021

Service End Date [ ]

Reimbursement Unit Rate \* [ ]

Provider Cost per Unit [ ]

Billable

Require Authorization

Allow Overlap

Authorization Allowed

Provider Conditions Apply

Provider Service Areas Allow

-

Active

- To select a service, click on the ellipsis search button next to the Service ID field. Another window will open up presenting a list of services to select for that provider. Scroll through the list view or use the Search By and Search Text fields to locate a service code.

**WellSky Human Services**

Test Provider | **Services**  
 10/31/2020 9:25 AM

**File**

**Service**

ServiceID \* [ ]

Service Code [ ]

Unit Type [ ]

Service Description [ ]

Secondary Code \* [ ]

Active Date \* [ ]

Service End Date [ ]

Unit Cost \* [ ]

Start Age [ ]

End Age [ ]

Require Credentials [ ]

Provider Rate Type [ ]

Member County [ ]

**Service Code Search**

Search By: Service Type Search Text: [ ] Search Cancel

ServiceCode	Service
SS125	Attendant Care
SS125-UN	Attendant Care - 2 clients



**Note:** The list of services is populated through the Service Code Utility. The services available for each provider are listed in the Service Code Search popup window.

5. Select the service code from the list view. The service code details will populate the Add Services page with data recorded in the Service Code Utility. Complete the service code information.
6. From the **File** menu, select **Save and Close Services** or **Save and Add Another** if you have more to add.



**Note:** The Service codes must be set up in the Service Code Setup Utility before you can add a service to a program or provider. For assistance, please contact your System Administrator.

## Provider Services Page Elements

The Services page contains the main Service section and access to the Conditions and Service Area subpage (in the left-hand navigation). Below is a list of the standard field descriptions that could appear on these pages. Based on your agency's configuration of the application some of these fields may be hidden and not visible on the page.

- a. **Division** – This non-editable field defaults to “AG”
- b. **Service ID** – This non-editable field displays the service ID, which is defined in the service code record created in the Service Code Utility. This is a system-required field.
- c. **Service Code** – This non-editable field is auto-populated from the service code record created in the Service Code Utility.
- d. **Unit Type** – The non-editable field displays the segment of time allocated to each service session. This field is defined in the service code record created in the Service Code Utility.
- e. **Service Description** – The non-editable field displays the name of the service, which is defined in the service code record created in the Service Code Utility.
- f. **Program** - These are the programs under which the provider will be delivering services.
- g. **Secondary Code** – The field provides an additional code. The data is defined in the service code record created in the Service Code Utility, but the user can modify the secondary code that would be specific for that agency. This is a system-required field.
- h. **Active Date** – The date the service can start to be dispensed. This date is auto-populated from the service code record created in the Service Code Utility but can be edited. This is a system-required field.
- i. **Service End Date** – This date field records the date the service has ended and no longer should be used
- j. **Reimbursement Unit Rate** – The price charged for each service session. This is a system-required field
- k. **Provider Cost per Unit** – This field will populate with the unit cost for this service that was uploaded from CIRTS in the Utilities chapter. If this vendor's unit cost for this service is different than it should be updated in the Unit Cost field.
- l. **Billable** – If checked, this service is billable.
- m. **Require Authorization** – An authorization is required before a member can receive the service.
- n. **Allow Overlap** – When selected, a member receiving the service can have overlapping start and end dates.
- o. **Authorization Allowed** – When selected, the service code is included in the list of provider services available to include in an authorization in both add and edit modes.
- p. **Provider Conditions Apply** – Indicates that the service is using the conditions recorded under the Provider Conditions tab. Selected by default.



- q. **Provider Service Areas Allow** – Indicates that the service is using the service areas recorded under the Service Areas tab. Selected by default. Clear this option to record service areas specific to this service.
- r. **Active** – Indicates that this service is active in the system. The service will display when a referral search is conducted in the Referrals tab or when adding a service to the members record for the specific provider/agency. Selected by default.



The eCIRTS generated <VendorServiceID> is created when the provider service is added. This number is unique to the service and the vendor and is required in the Provider Activity Import file. This value is not visible in the application but is included in the Provider Activity Import Data Report.

## Updating services

### To update services records in the provider record

1. Open the Provider record and select the Services tab.
2. Select the record you want to edit from the list view grid. The Services page opens.

**File**

Services	Service
Conditions	ServiceID * 3039
Service Area	Service Code S5125
	Unit Type Hour
	Service Description Attendant Care
	Secondary Code * ATC
	Active Date * 01/01/2020
	Service End Date
	Unit Cost * \$18.72
	Start Age
	End Age
	Require Credentials <input type="checkbox"/>
	Provider Rate Type
	Member County
	Service Ratio

Member County dropdown menu:

- ▶ Apache County
- ▶ Cochise County
- ▶ Coconino County
- ▶ Gila County
- ▶ Graham County
- ▶ Greenlee County
- ▶ La Paz County

Service Ratio:

- >1:2
- 1:1
- 1:2

3. Edit the service information as needed.
4. To remove the service, select **File > Delete Services**.
5. Select **File > Save and Close Services** when done.

## Service Area

Service areas are the locations in which service can be delivered. Most services use the provider’s service area location, which is recorded in the provider Service Areas tab. This default setting is in place when the “Provider Service Areas Allow” field is selected on the Services page. some PSAs assign by County, some by City. So, when you're adding service areas, don't necessarily start at the top of the page and go down. Start at the level you define service areas, and the rest will auto populate accordingly.

File

Services

Conditions

Service Area

<b>Service</b>	
ServiceID *	3039
Service Code	S5125
Unit Type	Hour
Service Description	Attendant Care
Secondary Code *	ATC
Active Date *	01/01/2020
Service End Date	
Unit Cost *	\$18.72
Start Age	
End Age	
Require Credentials	<input type="checkbox"/>
Provider Rate Type	
Member County	<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> <li>▶ Apache County</li> <li>▶ Cochise County</li> <li>▶ Coconino County</li> <li>▶ Gila County</li> <li>▶ Graham County</li> <li>▶ Greenlee County</li> <li>▶ La Paz County</li> </ul> </div>
Service Ratio	<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> <li>&gt;1:2</li> <li>1:1</li> <li>1:2</li> </ul> </div>
Active	<input checked="" type="checkbox"/>
Billable	<input checked="" type="checkbox"/>
Require Authorization	<input checked="" type="checkbox"/>
Allow Overlap	<input type="checkbox"/>
Authorization Allowed	<input checked="" type="checkbox"/>
Provider Conditions Apply	<input checked="" type="checkbox"/>
Provider Service Areas Allow	<input checked="" type="checkbox"/>

If you are setting up a service that will be offered in a different, or more limited service area, clear this setting and then save the more specific service area.



**Note:** Adding the service area record under the Services page creates an additional record that is associated with the specific service and does not affect the Service Areas record under the Service Areas tab in the main provider record.

## Referrals/Notifications

The Referral/Notifications tab shows the client referrals/notifications with a single provider in a list view grid. Use this tab to view the referrals and/or notifications. Client referrals/notifications can only be edited from within the client's record.

### To view the Referrals/Notifications

1. Open the Provider record and select the Referrals/Notifications tab.
2. Existing Referrals/Notifications are displayed in the list view grid.

File

Quick Search  
 Providers  Provider Name

- MY WORK
- CONTACTS
- CLIENTS
- CLIENT GROUPS
- AGENCIES
- PROVIDERS**
- RESOURCES
- REPORTS
- UTILITIES
- CLAIMS

Legacy Provider - LOC ID 123456

Test Provider (10104)

- Provider ID Numbers
- Linked Providers
- Service Area
- Providers
- Divisions
- Workers
- Services
- Referrals/Notifications**
- Authorizations
- Contracts
- Notes
- Agencies

Filters

Enrollment Provider  Contains  AND

Status  Contains  AND

Enrollment Provider  +

1 Referrals/Notifications record(s) returned - now viewing 1 through 1

eCIRTS Client ID	Division	Enrollment Provider	Client	Status	Start Date	View Record
10005	AG	Test, Stacy	White, Ellen	Referral		<a href="#">View</a>

First Previous Records per page 15 Next Last

- Select the referral/notification record that you want to view from the list view grid. The Referral/Notification detail page displays.
- Select **File > Close Referral Detail** to close the page.

File

Division *	AG
eCIRTS Client ID	10005
Client	White, Ellen
Referred Date	04/27/2021
Status	Referral
Status Date	04/27/2021
Enrollment Provider	Buck, Jennifer
CARES PSA	
Comments	

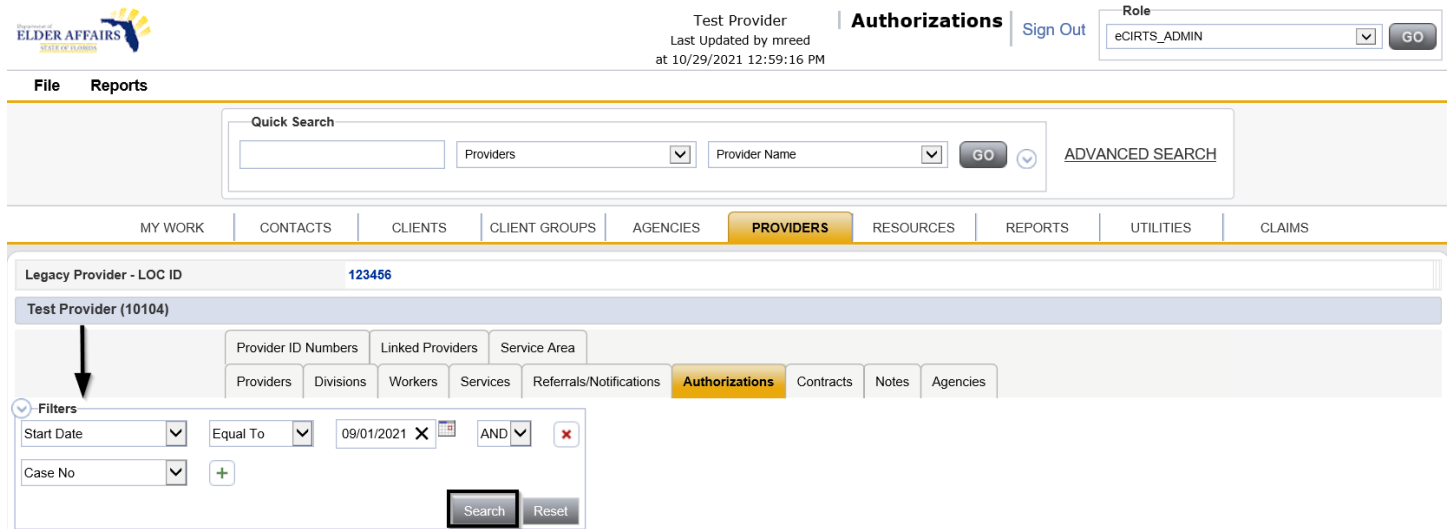
Referred Services

Primary	Adult Day Care
Secondary	Home Delivered Meals
Tertiary	Chore

## Authorizations

The Authorization tab displays the authorizations for the specific Provider. The authorization information will all be read only as it is informational for the Providers.

1. Open the Provider record and select the **Authorizations** tab.
2. Using the Filters Search, enter the filter criteria for the authorization that needs to be viewed. Click **Search**.



Department of ELDER AFFAIRS STATE OF FLORIDA

Test Provider  
Last Updated by mreed  
at 10/29/2021 12:59:16 PM

**Authorizations** | Sign Out | Role: eCIRTS\_ADMIN | GO

File Reports

Quick Search: [ ] Providers [v] Provider Name [v] GO [v] [ADVANCED SEARCH](#)

MY WORK | CONTACTS | CLIENTS | CLIENT GROUPS | AGENCIES | **PROVIDERS** | RESOURCES | REPORTS | UTILITIES | CLAIMS

Legacy Provider - LOC ID: 123456

Test Provider (10104)

Provider ID Numbers | Linked Providers | Service Area

Providers | Divisions | Workers | Services | Referrals/Notifications | **Authorizations** | Contracts | Notes | Agencies

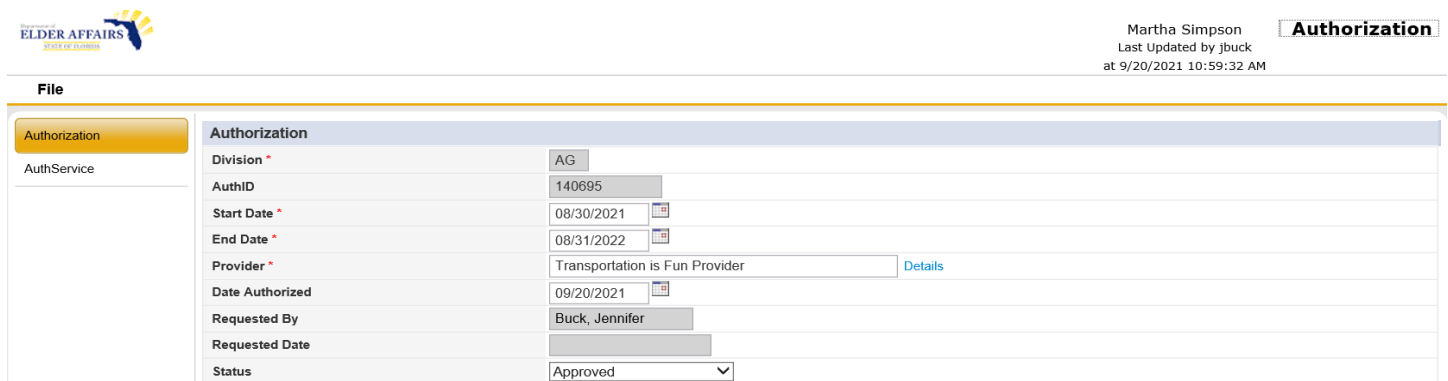
Filters

Start Date [v] Equal To [v] 09/01/2021 [x] AND [v] [x]

Case No [v] +

Search [ ] Reset [ ]

3. Select the Authorization record that you want to view from the list view grid.
4. The Authorization details page opens



Department of ELDER AFFAIRS STATE OF FLORIDA

Martha Simpson  
Last Updated by jbuck  
at 9/20/2021 10:59:32 AM

**Authorization**

File

Authorization

AuthService

Authorization

Division \* AG

AuthID 140695

Start Date \* 08/30/2021 [ ]

End Date \* 08/31/2022 [ ]

Provider \* Transportation is Fun Provider [ ] [Details](#)

Date Authorized 09/20/2021 [ ]

Requested By Buck, Jennifer

Requested Date [ ]


Status Approved [v]

5. The Authorization page elements include:
  - a. **Division\***: This field will default to AG.
  - b. **AuthID**: This field displays the Auth ID.
  - c. **Start Date**: Start Date of the Authorization.
  - d. **End Date**: End Date of the Authorization.
  - e. **Provider\***: This field will display the Providers name for the authorization.
  - f. **Date Authorized**: This field displays the date the authorization was created.
  - g. **Requested By**: This field displays the name of the person that requested the authorization.
  - h. **Requested Date**: This date reflects when the authorization was requested.
  - i. **Status**: This field reflects the disposition of the authorization.

## Auth Service

Authorized Services are the specific services that the provider will deliver to the client. Authorized services can be added to existing authorizations from within the client record. The Auth Service in the Provider Chapter is for information only. An authorization may have an unlimited number of authorized services. The same service can be used twice on the same authorization with overlapping dates only if the “Allow overlaps” option has been selected during the service code setup.

The same service can be used on two separate authorizations for the same client with no restrictions. The same service code may be available with different unit types and/or unit costs for a single provider. These are considered different services and they can be used twice on an authorization.



Martha Simpson **AuthService**  
 11/2/2021 5:18 PM

---

**File**

Authorization  
**AuthService**


Filters

Index Code

1 AuthService record(s) returned - now viewing 1 through 1

Index Code	SubObject Code	Start Date	End Date	Service Code	Units	Description	Unit Cost	Max Amount	Status	Auth Service EDI Status
GR	CCE	08/30/2021	08/31/2022	TRS	524	TRS TRANSPORTATION	\$15.00	\$7,860.00	Approved	Approved
						524		\$7,860.00		

Records per page



Martha Simpson - Authorization ID 140695 | **AuthService**  
 Last Updated by j buck  
 at 9/20/2021 10:59:32 AM

AuthService

**Authorized Service**

Index/SubObject *	IndexCode	Index Description	SubObject	SubObject Description
	GR	General Revenue	CCE	COMMUNITY CARE FOR THE ELD...

Start Date \*

End Date \*

Service Code \*

Service Description

Unit Type \*

Units Per

Units of Measure

Unit Cost \*

Max. Units \*

Max. Amount \*

Tasks Needed

Status

Auth Service EDI Status

Date Approved

## Contracts

Provider contracts allow an agency to set a maximum limit on the amount of funds a provider will receive. Though they can be used in combination with authorizations, the most common use is for services that are delivered without an authorization (for example, targeted case management, guest meals and prevention services).

### To view the Contracts tab

1. Open the Provider record and select the Contracts tab.

File

Quick Search

Providers  Provider Name

- MY WORK
- CONTACTS
- CLIENTS
- CLIENT GROUPS
- AGENCIES
- PROVIDERS**
- RESOURCES
- REPORTS
- UTILITIES
- CLAIMS

Legacy Provider - LOC ID **123456**

Test Provider (10104)

- Provider ID Numbers
- Linked Providers
- Service Area
- Providers
- Divisions
- Workers
- Services
- Referrals/Notifications
- Authorizations
- Contracts**
- Notes
- Agencies

Filters

Start Date  Greater Than  01/01/2000

Division

1 Contracts record(s) returned - now viewing 1 through 1

Division	Contract Number	Contract Status	Contract Amount	Start Date	End Date
AG	1234567	Active	\$150,000.00	07/01/2021	07/31/2021

## Adding contracts

### To add a contract to a provider record

1. Open the Provider record and select the Contracts tab.
2. Select **File > Add Contracts**. The Contract page opens.

File

Provider Contract

Division

Contract Number

Contract Status

Start Date \*

End Date \*

Contract Amount \*

3. Complete the contract information. Required fields are marked with a red asterisk (\*).
4. Select **File > Save Contracts** when done. When the record is saved the page refreshes and the Contract Services subpage becomes available.

### To add contract services

1. Open the Provider record and select the Contracts tab. Existing contract records are shown in the list view grid.
2. Select the target record from the list view. The Contract page opens.
3. Select Contract Services from the left-hand navigation. The Contract Services List view page opens. Existing contract services if any are shown in the list view grid.
4. Select **File > Add Contract Services**. The Contract Service subpage opens.

**File**

---

**Contract Service**

Service Code *	<input type="text"/>	<input type="button" value="..."/>
Effective Date *	<input type="text"/>	<input type="button" value="..."/>
End Date	<input type="text"/>	<input type="button" value="..."/>
Active *	<input type="checkbox"/>	
Max Units Allowed	<input type="text"/>	
Comments	<input type="text"/>	
ServiceID	<input type="text"/>	
Max Amount Allowed	<input type="text"/>	
State Federal Share	<input type="text"/>	
County Served	<input type="text"/>	

5. Complete the contract information. Required fields are marked with a red asterisk (\*). If needed, use the search ellipsis tool to find the service code.
6. Select **File > Save and Close Contract Service** when done.

### Contract Services page elements

- a. **Service Code** – Use this ellipsis search field to select the service associated to a contract. This is a system-required field.
- b. **Effective Date** – This read-only field populates with the Service Code effective date. This is a system-required field.
- c. **End Date** – This read-only field populates from the Service Code end date field.
- d. **Active** – This read-only field checkbox field populates from the Service Code after it has been selected. This is a system-required field.
- e. **Max Units Allowed** – This numeric field allows the user to record the allowed max units.
- f. **Comments** – This text field allows the user to record more in-depth descriptions of the contract service. This field allows up to 500 characters.
- g. **ServiceID** – ID for Service
- h. **Max Amount Allowed** - This numeric field allows the user to record the Maximum allowed amount
- i. **State Federal Share** – Amount of State Federal Share
- j. **County Served** – County where services are provided

### Notes

The Provider notes tab is the central location to view provider notes created in other areas of the application and also to create new notes from this page. You can attach files to provider notes (images in jpeg, gif and tif formats, PDF, Microsoft Word® and Microsoft Excel®). You can route notes to another worker, where they will appear in the worker's My Work chapter as well as in the provider notes tab.

#### To view a Provider Note

Open the Provider record and select the Provider Notes tab. Existing Provider notes are shown in the list view grid.

Quick Search

Providers  Provider Name

Legacy Provider - LOC ID **123456**

Test Provider (10104)

Provider ID Numbers Linked Providers Service Area

Providers Divisions Workers Services Referrals/Notifications Authorizations Contracts **Notes** Agencies

Filters

Note Date

1 Notes record(s) returned - now viewing 1 through 1

Note Date	Note By	Note Type	Description	Status	Date Completed	Attachment
11/02/2021	Reed, Monica	Uploaded Forms		Complete	11/02/2021	No

First Previous Records per page 15 Next Last

### Adding a note

1. Open the Provider record and select the Notes tab. Existing note records are shown in the list view grid.
2. Select **File > Add Notes** from the file menu.
3. The Notes Details page opens
4. Complete the note information. Required fields are marked with a red asterisk (\*)
5. Select **File > Save and Close Notes** from the File menu when done.

**Notes Details**

Division

Note Date \* 11/02/2021

Note By \* Reed, Monica

Note Type \*

Note Sub-Type

Description

Note

Status \* Draft

Date Completed

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

**Note Recipients**

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------





**Note:** When you save the note record status as draft, the text field will display as a single text field and is editable by the author and their supervisor. If another user opens the draft note record, the text field will be non-editable.

When you save the note record status as pending, this field may be configured so that any user accessing the note will be able to make edits directly into the note box.

### Note page elements

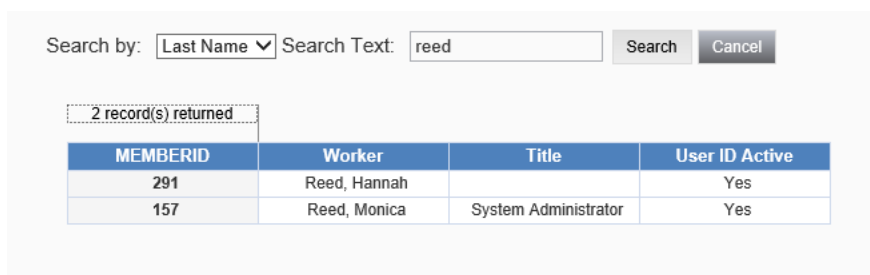
- Division** – This defaults to AG. This is a required field
- Note Date** – Record the date the note was added. This is a required field.
- Note By** – This worker dropdown records the worker who is adding the note. This is a required field.
- Note Type** – Select the note type
- Note Subtype** – Select the note subtype. This dropdown will only show values that apply to the selected note type.
- Description** – Use this text field to create a subject line for the note.
- Note** – Use this text box to record the notes contents. The note text box accommodates up to 25,000 characters.
- Status** – Select the note status.
- Date Completed** – This date field populates with a date when the status of the note is saved as complete. This field is read-only.

### Routing a Provider note to another worker

- Locate the Notes Recipients section at the bottom of the Notes page. Use the search ellipsis to search for a worker to add as a recipient.



- The Worker search popup appears. You can search by the worker's last name or the provider's name.
- Select the search field from the **Search by** list and type the search criteria in the **Search Text** entry box.
- Click **Search**.



Search by: Last Name Search Text: reed Search Cancel

2 record(s) returned

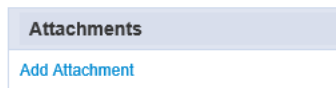
MEMBERID	Worker	Title	User ID Active
291	Reed, Hannah		Yes
157	Reed, Monica	System Administrator	Yes

- Click to select the worker from the search window. The worker's name will appear in the Note Recipients list view.
- Select **File > Save and Close Notes** from the File menu.

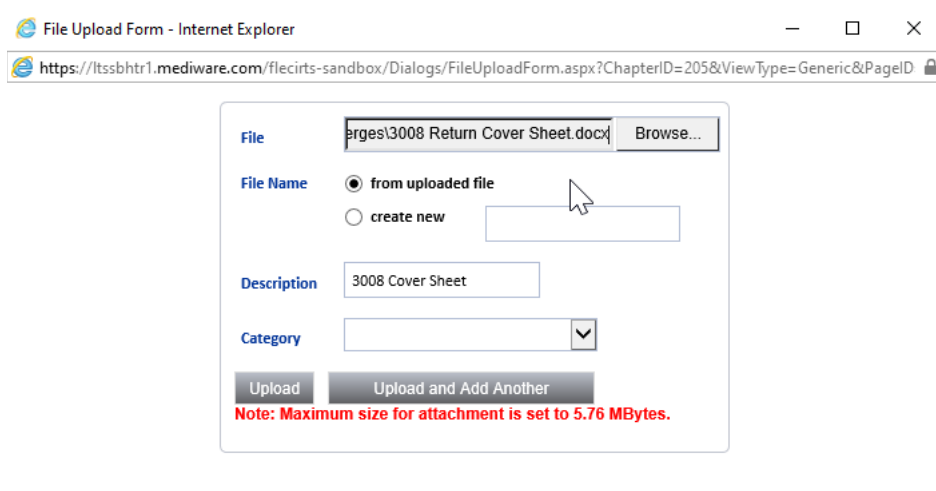
Note Recipients					
Add Note Recipient: <input type="text"/> <input type="button" value="Clear"/>					
Name	Date Sent	Date Read	Status	Date Signed	
Reed, Monica	11/2/2021		Unread		<a href="#">Remove</a>

### Add an attachment to a note

- From the open Notes Detail page, click **Add Attachment** in the Attachments section.



- The File Upload Form page opens. Click the **Browse** button to select the file. Navigate to the file location and select the appropriate file.



- Complete the attachment information and click **Upload**. The attachment information is shown in the Document section of the Note page. If the note is in a pending status, you can use the Remove link to remove the attachment. When the note is in a complete status, you can no longer remove the attachment.

Attachments			
<a href="#">Add Attachment</a>			
Document	Description	Category	Action
<a href="#">3008 Return Cover Sheet.docx</a>	3008 Return Cover Sheet		<a href="#">Remove</a>

- Select **File > Save and Close Notes** when done. You can see which notes have attachments in the Notes Page list view Attachment column.

Quick Search

Providers

Legacy Provider - LOC ID **123456**

Test Provider (10104)

Provider ID Numbers Linked Providers Service Area

Providers Divisions Workers Services Referrals/Notifications Authorizations Contracts **Notes** Agencies

Filters

Note Date

2 Notes record(s) returned - now viewing 1 through 2

Note Date	Note By	Note Type	Description	Status	Date Completed	Attachment
11/02/2021	Reed, Monica	Uploaded Forms		Complete	11/02/2021	No
11/02/2021	Reed, Monica	Uploaded Forms	3008 cover sheet	Draft		Yes

### Editing a note

You can edit a note to add text or an attachment or to route the note to another user. The note status changes the way that you can edit a note

- Draft – The large note text field displays as a single text field and is editable by the author and their supervisor. If another user opens the draft note record, the note text field is read-only.
- Pending – Any user will be able to make edits directly into the note box. You can remove attachments from a note in pending status.
- Complete – The note record becomes read-only.

### To view and edit the provider note in the provider record

1. Open the Provider record and select the Notes tab. Existing note records are shown in the list view grid.
2. Select a note from the list view to open it. The Notes detail page opens. Edit the note information as needed.
3. Select **File > Save and Close Note** when finished.

File Tools

Notes

**Notes Details**

Division: AG

Note Date: 11/02/2021

Note By: Reed, Monica

Note Type: Uploaded Forms

Note Sub-Type: 3008 - Medical Certification Form

Description: 3008 cover sheet

Note:

Status: Draft

Date Completed:

---

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
<a href="#">3008 Return Cover Sheet.docx</a>	3008 Return Cover Sheet		<a href="#">Remove</a>

---

**Note Recipients**

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Reed, Monica	11/02/2021		Unread		<a href="#">Remove</a>

## Agencies

The Agency tab records all the agencies that the provider is associated to from within the Provider record. The Agencies tab is a read-only list that displays the Agency ID, Agency Name, Start and End Date.

File

Quick Search:  Providers  Provider Name

[MY WORK](#) | [CONTACTS](#) | [CLIENTS](#) | [CLIENT GROUPS](#) | [AGENCIES](#) | **[PROVIDERS](#)** | [RESOURCES](#) | [REPORTS](#) | [UTILITIES](#) | [CLAIMS](#)

Legacy Provider - LOC ID:

Transportation is Fun Provider (10133)

[Provider ID Numbers](#) | [Linked Providers](#) | [Service Area](#) | **[Agencies](#)**

[Providers](#) | [Divisions](#) | [Workers](#) | [Services](#) | [Referrals/Notifications](#) | [Authorizations](#) | [Contracts](#) | [Notes](#)

Filters: Agency ID

1 Agencies record(s) returned - now viewing 1 through 1

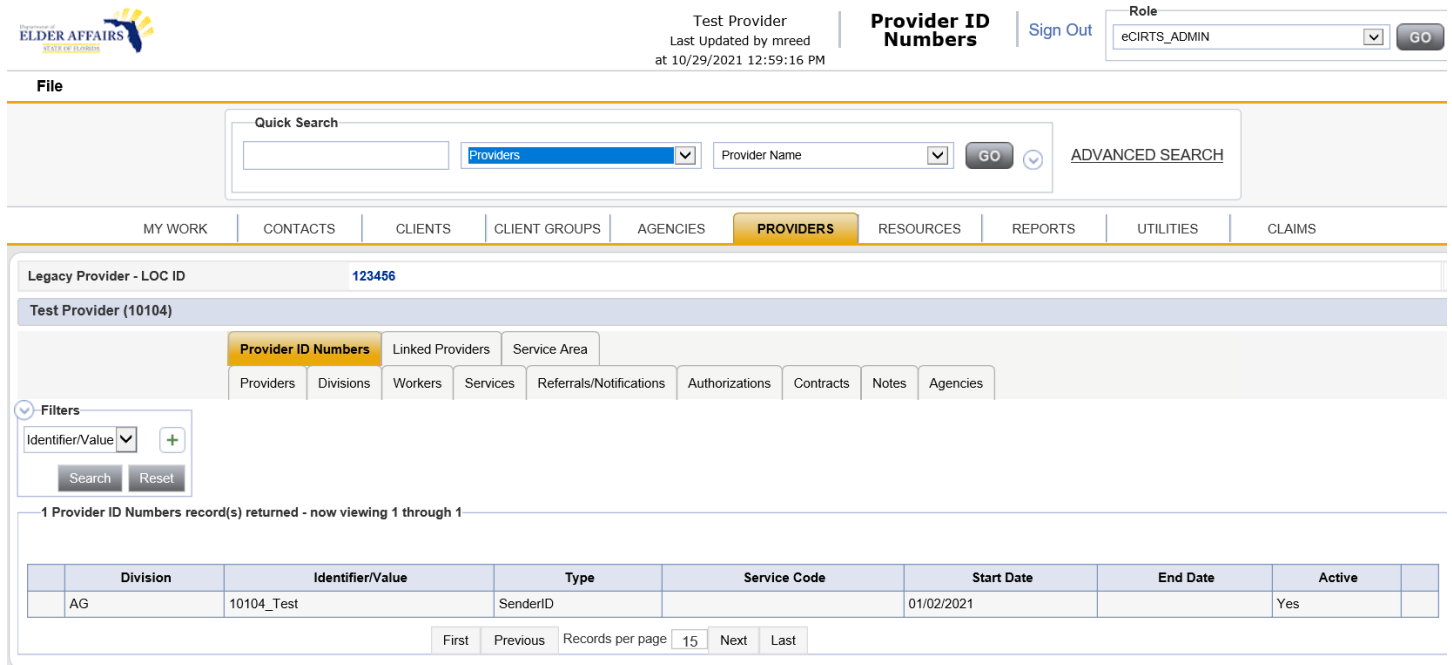
Agency ID	Agency Name	Start Date	End Date
10102	Elder Source, The Area Agency on Aging of Northeast Florida	01/01/2020	

## Provider ID Numbers

The Provider ID Numbers tab records the different identification numbers (IDs) an agency may have.

### To view the Provider ID numbers tab

1. Open the Provider record and select the Provider ID Numbers tab. Existing Provider ID Numbers are shown in the list view grid.



The screenshot shows the WellSky interface for a "Test Provider". The user is logged in as "eCIRTS\_ADMIN". The "Provider ID Numbers" tab is selected. The interface includes a search bar, navigation tabs (MY WORK, CONTACTS, CLIENTS, CLIENT GROUPS, AGENCIES, PROVIDERS, RESOURCES, REPORTS, UTILITIES, CLAIMS), and a table of Provider ID Numbers records.

**File**

Quick Search:  Providers  Provider Name   [ADVANCED SEARCH](#)

Legacy Provider - LOC ID: 123456

Test Provider (10104)

Provider ID Numbers | Linked Providers | Service Area

Providers | Divisions | Workers | Services | Referrals/Notifications | Authorizations | Contracts | Notes | Agencies

Filters: Identifier/Value

1 Provider ID Numbers record(s) returned - now viewing 1 through 1

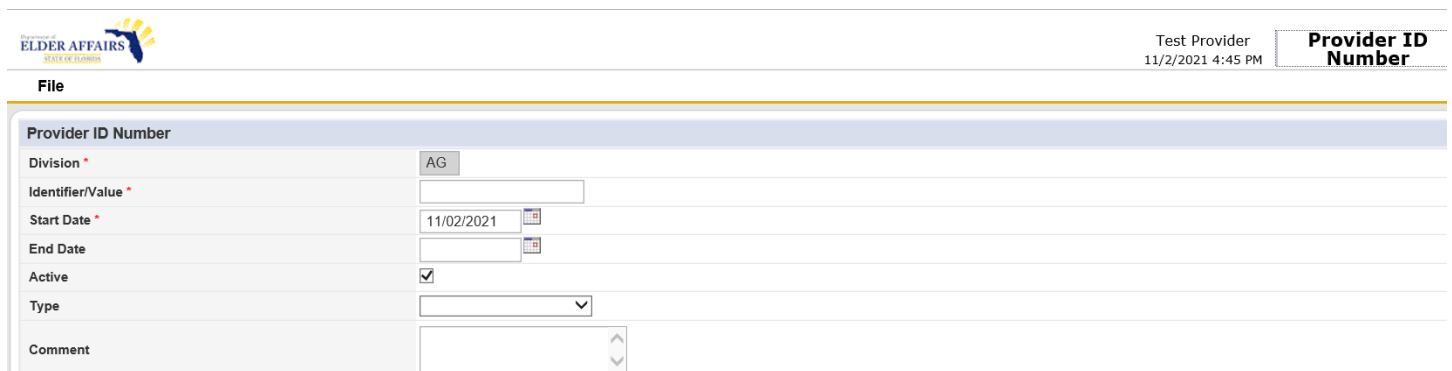
Division	Identifier/Value	Type	Service Code	Start Date	End Date	Active
AG	10104_Test	SenderID		01/02/2021		Yes

First Previous Records per page 15 Next Last

## Adding Provider ID Numbers

### To add Provider ID numbers to the record

1. Open the Provider record and select the Provider ID Numbers tab.
2. Select **File > Add Provider ID Number**. The Provider ID Number page opens.



The screenshot shows the "Add Provider ID Number" form in the WellSky interface. The user is logged in as "Test Provider" on 11/2/2021 at 4:45 PM. The "Provider ID Number" tab is selected.

**File**

Provider ID Number

Division \* AG

Identifier/Value \*

Start Date \* 11/02/2021

End Date

Active

Type

Comment

3. Complete the ID number information. Required fields are marked with a red asterisk (\*).
4. Select **File > Save and Close Provider ID Numbers** when done.

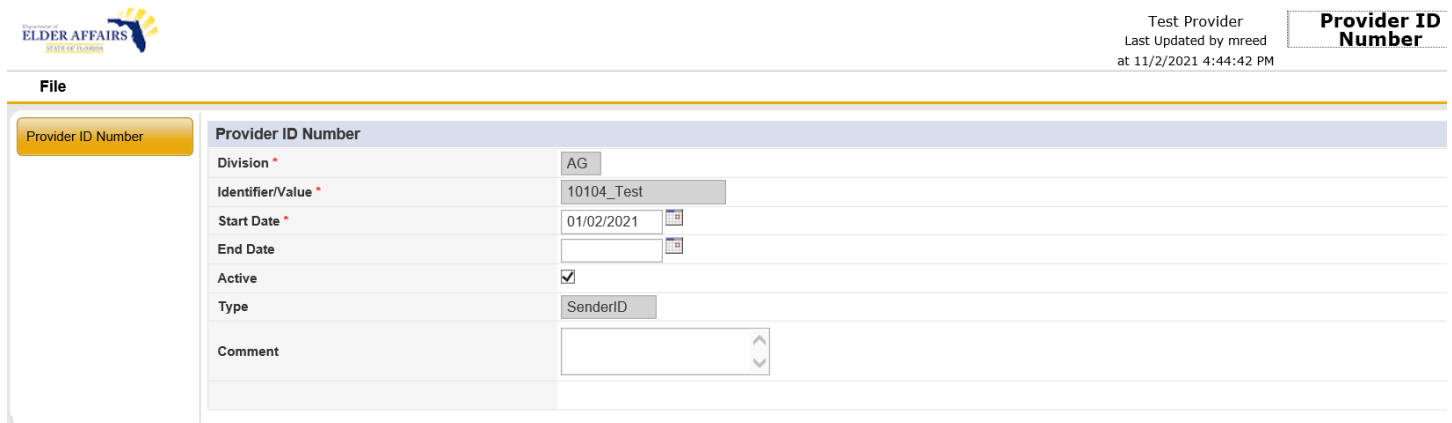
## Provider ID Number page elements

- Division** – This field defaults to “AG” and is a system-required field.
- Identifier/Value** – the eCIRTS generated Provider ID for the provider, underscore with no spaces, then the first 5 letters of the Provider name, including spaces would be the “SenderID” as an example
  - i.e. - SUNCOAST PROVIDERS (10211) = 10211\_SUNCO
  - i.e. - ALL SERVICES PROVIDER (10357) = 10357\_ALL S
- Start Date** – The earliest date the provider can upload activity files
- End Date** – Enter the end date for the ID.
- Active** – This checkbox indicates the status. This field defaults to active when adding a new record.
- Type** – SenderID
- Comment** – Add a comment

## Editing Provider ID Numbers

### To update the Provider ID number record

- Open the Provider record and select the Provider ID Numbers tab.
- Select the record from the list view grid. The Provider ID Number page opens.



Department of ELDER AFFAIRS  
 STATE OF FLORIDA

Test Provider  
 Last Updated by mreed  
 at 11/2/2021 4:44:42 PM

**Provider ID Number**

**File**

**Provider ID Number**

Division \* AG

Identifier/Value \* 10104\_Test

Start Date \* 01/02/2021

End Date

Active

Type SenderID

Comment

- Change the provider number information as needed.
- To delete the provider number, select Delete Provider ID Number from the File menu. A confirmation message appears. Click OK to continue.
- Select **File > Save and Close Provider ID Number** when done.

## Linked Provider

The Linked Providers tab shows the relationship between a parent agency and subsidiaries. The subsidiaries are known as child providers. You can use this page to copy information from the parent provider to the subsidiary, or child provider. You can edit the child information without applying those changes to the parent agency.

### Viewing the Linked Providers page

- Open the Provider record and select the Linked Providers tab. If a linked provider relationship exists, it is shown in the list view grid.

**File Tools**

Quick Search  Providers

MY WORK CONTACTS CLIENTS CLIENT GROUPS AGENCIES **PROVIDERS** RESOURCES REPORTS UTILITIES CLAIMS

Legacy Provider - LOC ID **123456**

Test Provider (10104)

Provider ID Numbers **Linked Providers** Service Area

Providers Divisions Workers Services Referrals/Notifications Authorizations Contracts Notes Agencies

Filters  
Relationship

1 Linked Providers record(s) returned - now viewing 1 through 1

Relationship	Provider Name	Street	City	State	Zip Code	Status	<input type="checkbox"/>
Child	DOEA - DEPARTMENT OF ELDER AFFAIRS	4040 Esplanade Way	Tallahassee	FL	32399	Active	<input type="checkbox"/>

Records per page

## Adding a linked Provider

### To add a provider link relationship to an existing provider record

1. Open the Provider record and select the **Linked Providers** tab.
2. Select **File > Link to a Vendor**. The Link a Provider page opens

Department of ELDER AFFAIRS STATE OF FLORIDA

Test Provider 11/2/2021 4:56 PM **Link a Provider**

**File**

Relationship \*

Provider \*

Start Date \*

End Date

3. Select the Relationship type from the dropdown.
4. From the Provider field, use the search ellipsis to locate a provider record. The provider search popup appears.

Search By:  Search Text:

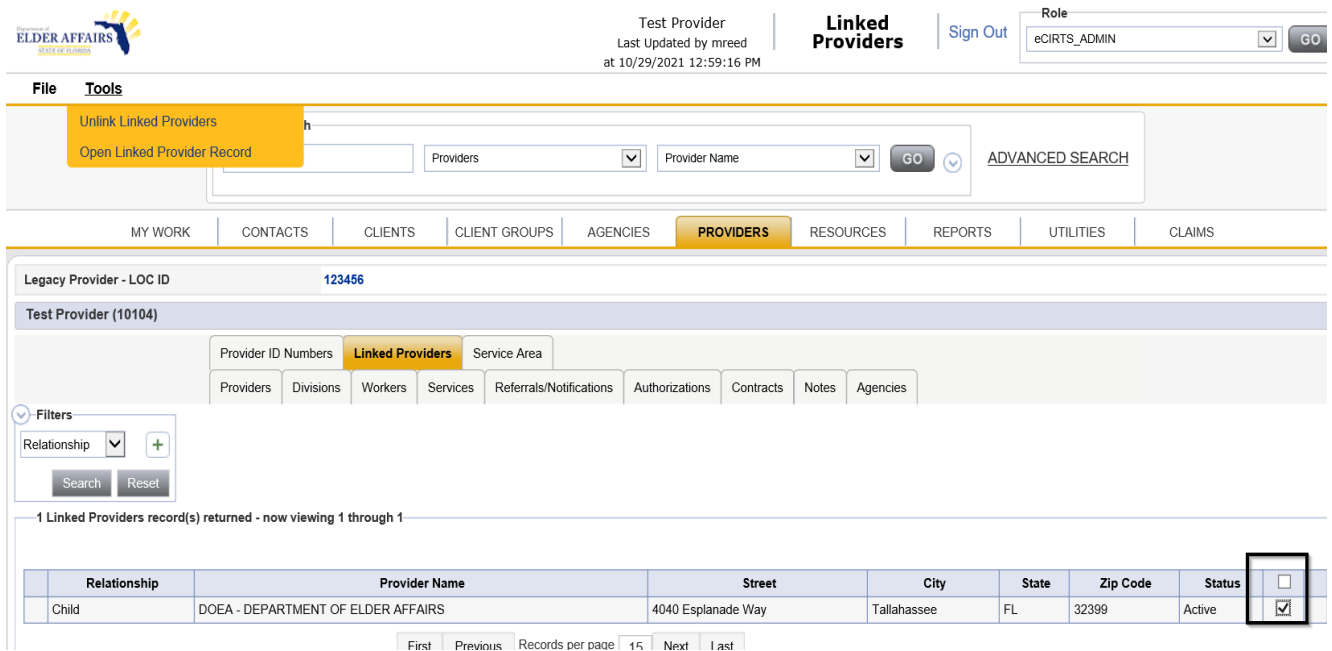
NAME	PROVIDER ID	PROVIDER NO	STREET	CITY	MEDICAID ID
Vendor 1	10002	12345	710 South Campbell Avenue	Tucson	

5. Select a search field from the Search by dropdown and then type your search criteria in the Search Text entry bar. Click Search.
6. Click to select the parent provider from the popup window. The search popup closes, and the provider information is shown in the Link a Provider page.
7. Enter a link Start Date and End Date as needed.
8. Select **File > Save and Close** when done.

## Unlinking a linked Provider

### To remove a linked provider from the provider record

1. Open the Provider record and select the **Linked Providers** tab.
2. Use the checkbox next to the provider's name in the list view grid to select the linked provider.
3. A confirmation message appears. Click OK to continue. The record will be unlinked and will be removed from the list view grid. A second confirmation message appears. Click OK.



The screenshot shows the 'Linked Providers' tab for a provider record. The interface includes a navigation menu with options like 'MY WORK', 'CONTACTS', 'CLIENTS', 'CLIENT GROUPS', 'AGENCIES', 'PROVIDERS', 'RESOURCES', 'REPORTS', 'UTILITIES', and 'CLAIMS'. The 'PROVIDERS' tab is selected. Below the navigation menu, there are tabs for 'Provider ID Numbers', 'Linked Providers', and 'Service Area'. The 'Linked Providers' tab is active. A search filter is visible on the left, and a table of linked providers is displayed below. The table has columns for 'Relationship', 'Provider Name', 'Street', 'City', 'State', 'Zip Code', and 'Status'. The 'Status' column contains a checkbox, which is highlighted with a red box in the original image.

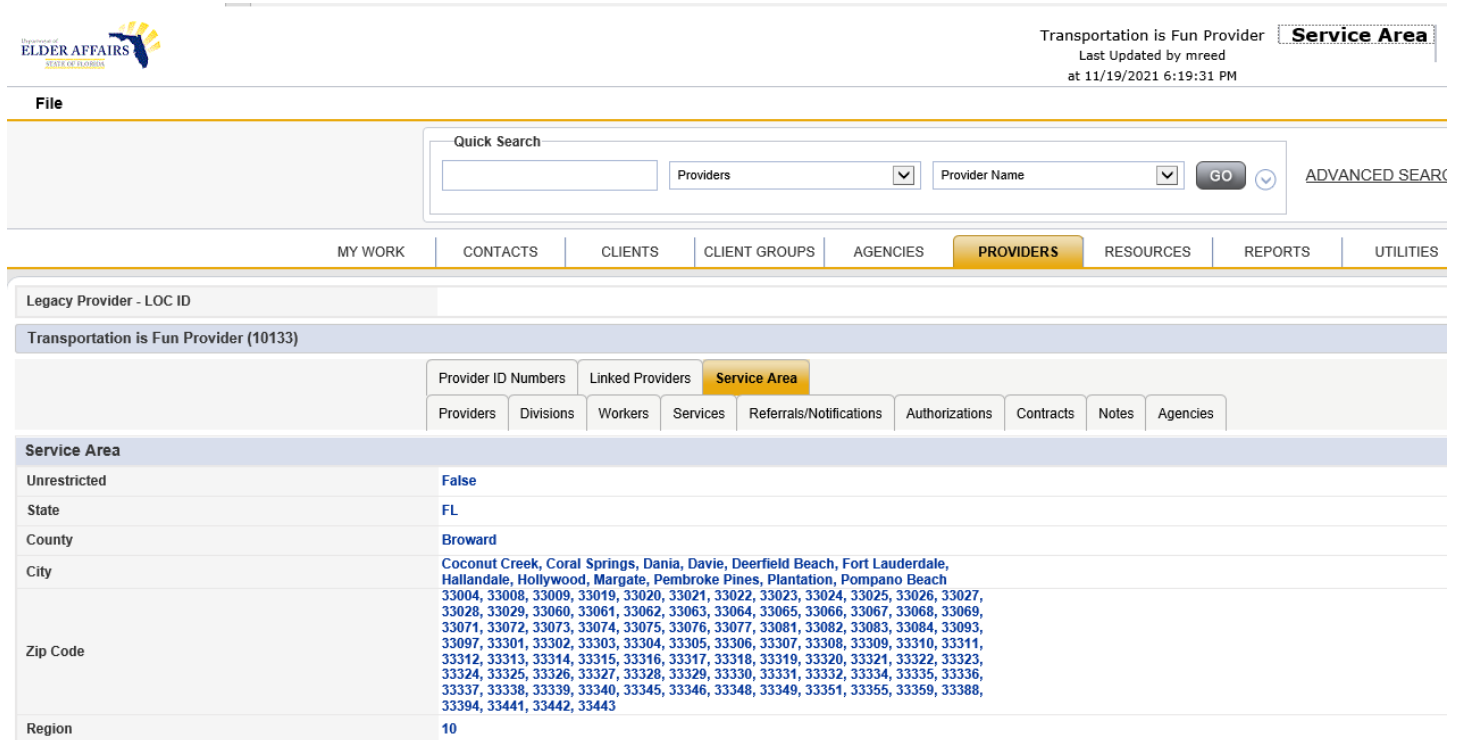
Relationship	Provider Name	Street	City	State	Zip Code	Status
Child	DOEA - DEPARTMENT OF ELDER AFFAIRS	4040 Esplanade Way	Tallahassee	FL	32399	Active



## Service Area

The Service Areas tab contains information about what areas the provider serves in the community. Providers can also have service-specific service areas. A master Service Area record must exist for the Provider first before service-specific service areas can be added.

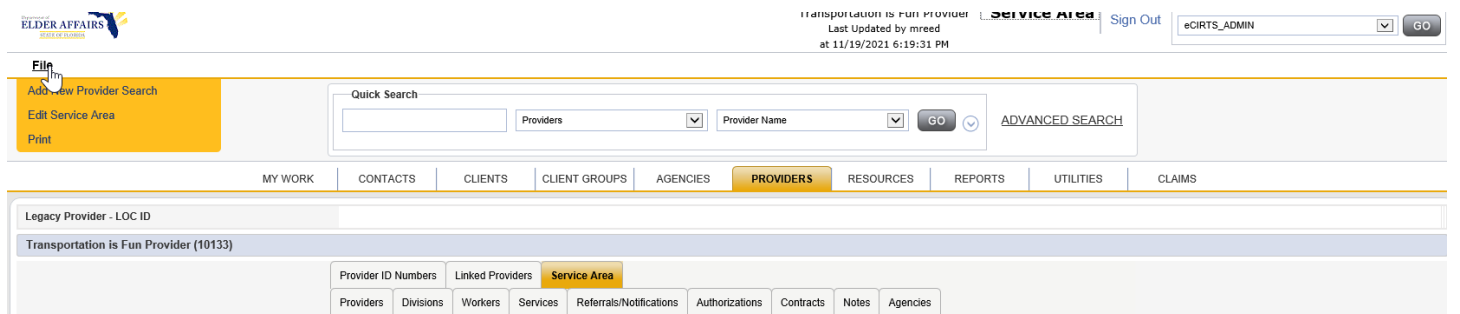
1. Open the Provider record and select the **Service Areas** tab. Each Provider will have a single service area record.



The screenshot shows the 'Service Area' page for the 'Transportation is Fun Provider'. The page includes a navigation menu with 'PROVIDERS' selected. The main content area displays the following information:

Legacy Provider - LOC ID	
Transportation is Fun Provider (10133)	
Provider ID Numbers	33004, 33008, 33009, 33019, 33020, 33021, 33022, 33023, 33024, 33025, 33026, 33027, 33028, 33029, 33060, 33061, 33062, 33063, 33064, 33065, 33066, 33067, 33068, 33069, 33071, 33072, 33073, 33074, 33075, 33076, 33077, 33081, 33082, 33083, 33084, 33093, 33097, 33301, 33302, 33303, 33304, 33305, 33306, 33307, 33308, 33309, 33310, 33311, 33312, 33313, 33314, 33315, 33316, 33317, 33318, 33319, 33320, 33321, 33322, 33323, 33324, 33325, 33326, 33327, 33328, 33329, 33330, 33331, 33332, 33334, 33335, 33336, 33337, 33338, 33339, 33340, 33345, 33346, 33348, 33349, 33351, 33355, 33359, 33388, 33394, 33441, 33442, 33443
Linked Providers	
Service Area	
Providers	
Divisions	
Workers	
Services	
Referrals/Notifications	
Authorizations	
Contracts	
Notes	
Agencies	
Unrestricted	False
State	FL
County	Broward
City	Coconut Creek, Coral Springs, Dania, Davie, Deerfield Beach, Fort Lauderdale, Hallandale, Hollywood, Margate, Pembroke Pines, Plantation, Pompano Beach
Zip Code	
Region	10

2. Select File > Edit Service Area to edit an existing Service Area.



The screenshot shows the 'Edit Service Area' page. The 'File' menu is open, and 'Edit Service Area' is selected. The page displays the same provider information as the previous screenshot, but with a 'Service Area' tab highlighted in the navigation menu.

3. Select File > Add Service Area to add a new Service Area.
4. The Service Area page displays. Select or update the service area. Select the values in the left-hand box and move them to the right-hand box using the arrows.



**Note:**

Select the most specific level of service area first and the application will populate other details. Do not go top down. For example, when you select the zip code, the application will populate the appropriate state, region, county, and city fields.

**File**

**Service Area**

Service Area

Unrestricted

County	<ul style="list-style-type: none"> <li>Abbeville</li> <li>Acadia</li> <li>Accomack</li> <li>Ada</li> <li>Adair</li> <li>Adams</li> </ul>	<ul style="list-style-type: none"> <li>Broward</li> </ul>
City	<ul style="list-style-type: none"> <li>Aaronsburg</li> <li>Abbeville</li> <li>Abbot</li> <li>Abbotsford</li> <li>Abbott</li> <li>Abbotstown</li> <li>Abbyville</li> </ul>	<ul style="list-style-type: none"> <li>Coconut Creek</li> <li>Coral Springs</li> <li>Dania</li> <li>Davie</li> <li>Deerfield Beach</li> <li>Fort Lauderdale</li> <li>Hallandale</li> </ul>
Zip Code	<ul style="list-style-type: none"> <li>00501</li> <li>00544</li> <li>00601</li> <li>00602</li> <li>00603</li> <li>00604</li> <li>00605</li> </ul>	<ul style="list-style-type: none"> <li>33004</li> <li>33008</li> <li>33009</li> <li>33019</li> <li>33020</li> <li>33021</li> <li>33022</li> </ul>
State	<ul style="list-style-type: none"> <li>AA</li> <li>AE</li> <li>AK</li> <li>AL</li> <li>AP</li> <li>AR</li> <li>AS</li> </ul>	<ul style="list-style-type: none"> <li>FL</li> </ul>
Region	<ul style="list-style-type: none"> <li>1</li> <li>11</li> <li>2</li> <li>3</li> <li>4</li> <li>5</li> </ul>	<ul style="list-style-type: none"> <li>10</li> </ul>



**Note:**

To select multiple values, press CTRL while you select the values you want to apply. Use the arrow button to move the value from the left box to the right box.

- The double right arrow button will move all value from the left to right
- The single right arrow button will move selected values from left to right
- The single left arrow button will move all values from right to left
- The double left arrow button will move selected values from right to left

5. Select File > Save and Close Service Area when finished.

## Rate Change Utility

At the change of fiscal year or occasionally mid—year, the unit cost or rate for a number of services may need to be changed. The Rate Change utility allows the unit cost or rate for one or many services to be easily changed in a single session, eliminating the need to change rates on a service code by service code basis.

The utility allows rates to be changed at the system level and at the provider level, permits the service code and/or the unit cost to be end dated, and permits deactivation of defunct service codes. Current data is exported to a spreadsheet, changes are made, and then the spreadsheet is imported back into eCIRTS. Data validation is performed, and error logs are automatically generated if a problem is detected with the import. Reports detailing the history of rate changes at both the system and provider levels are available.

## Additional software requirements

The Rate Change Utility generates exports, and imports Microsoft Excel spreadsheets. Microsoft 2000 or 2003 is required at a minimum in order to use the utility.

## Overview of the utility

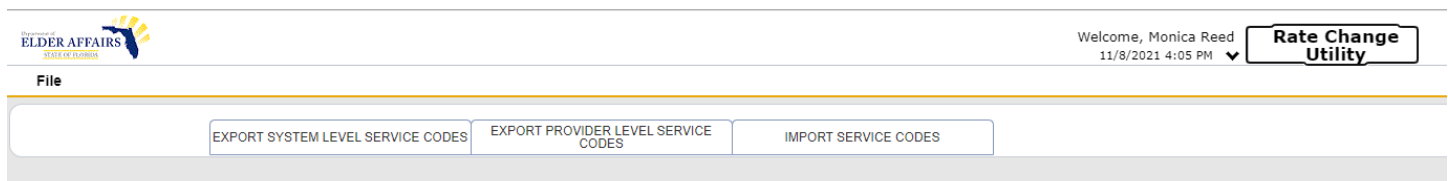
The Rate Change utility allows rates to be quickly and easily changed.

1. Use search filters to isolate the service codes for which you will change the rates.
2. Export the service codes to a Microsoft excel spreadsheet.
3. Update the rates.
4. Import the new rates into eCIRTS.

## Accessing the utility

The Rate Change utility is available through the Utilities chapter. Once the utility has been opened, there are 3 options available:

- Export System Level Service Codes
- Export Provider Level Service Codes
- Import Service Codes



## Identifying and exporting system service codes

System-level service codes are the templates you can use when adding services to specific providers.



**Note:** It is recommended that you generate a new export each time you update rates. Data changes you make through the user interface may cause errors or conflicts on import if the export is based on out-of-date data.

## Search filters

The first step in changing rates is to identify the affected service codes using a series of filters. When the filters are completed and you search for records, the search results will display the first 100 service codes that meet the specified criteria. These 100 service codes act as a preview so you can further refine the filter criteria if needed. The exported spreadsheet will contain all service codes that meet the criteria, even if there are more than 100.

- **Billable** – indicates whether a service code is billable, user-defined, or visible on the Service Codes Detail subpage.
- **Effective Date** – the earliest date that a service code can be used. The effective date is user-defined and visible on the Service Codes Detail subpage.
- **End Date** – last date a service code can be used. The end date is user-defined and visible on the Service Codes Detail subpage.
- **Fund Code** – fund codes (Division record) are associated with individual unit cost/rates, and a service code can have different rates for each fund code. The fund code is user-defined and visible on the Unit Costs subpage.
- **Last Changed Date** – the date of the most recent save. The date is system-generated and visible in the history or upper right corner of the screen on the Service Codes Detail subpage.
- **Provider Type** – types or categories of providers that can render a service. The provider type is user defined and visible on the Provider Types subpage.
- **Requires Authorization** – when selected, a service code cannot be delivered without an authorization. The Requires Authorization field is user defined and visible on the Service Codes Detail subpage.
- **Secondary Code** – usually the procedure or unmodified service code. The secondary code is user-defined and visible on the Service Codes Detail subpage.
- **Service Code** – often a combination of procedure code and modifiers. The service code is user-defined and visible on the Services Codes Detail subpage.
- **Service Category** – grouping of services by category. The service category is user-defined and visible on the Services Codes Detail subpage.
- **Service ID** – unique ID assigned to each service code. The service ID is system-generated and visible as a read-only field on the Service Codes Detail subpage.
- **Service Name** – textual description of the service code. The service name is user-defined and visible on the Service Codes Detail subpage.
- **Service Type** – grouping of services by type. The service type is user defined and visible on the Service Codes Detail subpage.
- **Unit Type** – how each unit of service is measured ( that is, hour, session). The unit type is user-defined and visible on the Service Codes Detail subpage.



**Note:** The utility will only return ACTIVE service codes.

## Effective date of change

The Effective Date of Change must be indicated prior to exporting services codes. This date indicated indicates the date that the new rates will go into effect. The system will use the indicated value (default value is the current date) as a default for each exported service code, but the dates can be adjusted on a code-by-code basis prior to import.

## Export to Excel

This Export to Excel button will not be active until you select one or more service codes. Once the service codes have been selected and the effective date of change has been set, click Export to Excel. A dialog box will open, prompting you to open, save, or cancel. WellSky recommends selecting Save and saving a copy of the exported file prior to adjusting rates.

## Indicating new system-level rates

### Spreadsheet format

The exported spreadsheet includes two major subsections:

- Informational Data
- User Input

### Informational data

Data in the information section is provided for reference and should not be updated or altered by the user.

INFORMATIONAL DATA (DO NOT EDIT)																	
Service Code Data											Unit Cost Data						
Report Type	Service ID	Code	Name	Type	Category	Unit Type	Billable	Last Changed Date	Last Changed Time	Current Effective Date	Current End Date	Unit ID	Rate	Fund Code	Type	Start Date	End Date
System	238	101 HF	Residential Bc SA	Substanc	Day		True	5/2/2017	5:27 PM	10/1/2006		25	\$37.42	SA		10/1/2008	
System	239	101 HF H	Residential Bc SA	Substanc	Day		True	5/2/2017	5:27 PM	1/1/2006		26	\$37.42	SA		10/1/2008	
System	245	101 HF H	Residential Bc SA	Substanc	Day		True	5/2/2017	5:27 PM	4/10/2007		48	\$65.90	SA	Daily	10/1/2007	
System	54	96809 UB	HF Lab Test 1 SA	Substanc	Session		True	5/2/2017	5:27 PM	10/1/2006		53	\$60.67	SA		10/1/2008	
System	71	96801 HF	Intake Evalua SA	Substanc	Session		True	5/2/2017	5:27 PM	1/1/2006		2	\$112.26	SA		10/1/2008	
System	9057	96801 HF	Intake Evalua SA	Substanc	Session		True	5/2/2017	5:27 PM	1/1/2006		22	\$112.26	SA		10/1/2008	
System	165	96801 UC	Diagnosis and State Only 1MRW/Std 5 mins				True	5/2/2017	5:27 PM	1/1/2006		114	\$0.80	ID		1/1/2006	
System	165	96801 UC	Diagnosis and State Only 1MRW/Std 5 mins				True	5/2/2017	5:27 PM	1/1/2006		53	\$25.35	DSOC		10/1/2008	
System	5	96804 HF	Individual Coun SA	Substanc	30 mins		True	5/2/2017	5:27 PM	1/1/2006		5	\$24.96	SA		10/1/2008	

## Report type

The report type for System Level service codes is always “System.” This is used as a validation point during import.

## Service code data

The Service Code Data section contains a snapshot of key data visible on the Service Code Detail subpage in the Service Codes section of the utilities chapter.

## Unit cost data

The Unit Cost Data section contains a snapshot of the key data visible on the Unit Cost subpage in the Service Codes section of the utilities chapter.

## User input

The User Input section is the area of the spreadsheet where you can edit service code information. Do not adjust cell formatting.

USER INPUT (UPDATE DATA HERE)												
Service Code Data												
Report Type	Service ID	Effective Change Date	Deactivate Service Code	End Date Service Code	Unit Cost Rate	Unit Cost Rate Type	Unit Cost End Date	Unit Cost Credential	Unit Cost Max Units	Unit Cost Max1	Unit Cost Max2	
System	238	01/11/2019										
System	239	01/11/2019										
System	245	01/11/2019										
System	54	01/11/2019										
System	71	01/11/2019										
System	9057	01/11/2019										
System	165	01/11/2019										
System	165	01/11/2019										
System	5	01/11/2019										

## Excluding service codes

If a service code is included on the exported spreadsheet that does not need to be updated, delete the row containing that service code.

## Effective change date (required)

This column will be pre-populated with the value specified at the time of export and indicates the start date of the new rate.

**Example:** Assume service code 123:AA currently has a rate of \$5.00. A new unit cost of \$6.00 with an effective change date of 2/1/19 is imported. The utility will end date the \$5.00 rate to 1/31/19 and will create a new unit cost of \$6.00 with a start date of 2/1/19.

The pre-populated date can be modified for each service code.

### Deactivate service code (optional)

If a service code is no longer going to be used, enter a “Y” in the Deactivate Service Code column. The deactivation will be effective as soon as the file is imported; there is no mechanism for indicating a specific deactivation date.

If the service code will remain in use, enter an “N” or leave the column blank.

### Unit cost rate (required unless the service code is being deactivated)

The new unit cost or rate should be entered in the Unit Cost Rate column. The new rate will have a start date equal to the effective change date.

### Unit cost end date (optional)

If the new unit cost has an end date, enter that in the End Date Service Code column. If the duration the rate will be in effect is open-ended, then leave the column blank.

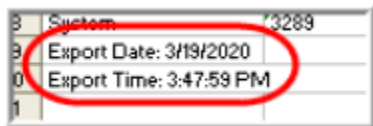
### Additional optional fields

End date service code, unit cost rate type, unit cost credential, unit cost max units, unit cost max1, unit cost max2

### Saving the spreadsheet

Save the spreadsheet when you’ve made the changes you need to make. When you save the file verify the following items:

- The file name ends in .xls
- All service codes that are not being updated have been deleted from the file
- All empty rows between the remaining service codes have been deleted
- The last two lines (export date and export time) are still there



3	System:	73289
3	Export Date:	3/19/2020
0	Export Time:	3:47:59 PM
1		

- The effective change date column is populated for all service codes

## Identifying and exporting provider service codes

Provider level service codes are the service codes assigned to individual providers. Use the Export Provider Level Service Codes feature to update these codes.

**Note:** WellSky recommends that you generate a new export each time you update rates. Data can be changed through the user interface that may cause errors or conflicts on import if the export is based on out-of-date data.

### Search filters

The first step in changing rates is to identify the affected service codes using a series of filters. When the filters are completed and you search for records, the search results will display the first 100 service codes that meet the specified criteria. These 100 service codes act as a preview so you can further refine the filter criteria if needed. The exported spreadsheet will contain all service codes that meet the criteria, even if there are more than 100.

## Available search filters:

- **Service Category** – grouping of services by category. The service category is user-defined and visible on the Service Codes Detail subpage.
- **Service Code** – often a combination of procedure code and modifiers. The service code is user-defined and visible on the Service Codes Detail subpage.
- **Service ID** – unique ID assigned to each service code by WellSky Human Services. The service ID is system-generated and visible as a read-only field on the Service Codes Detail subpage.
- **Service Name** – textual description of the service code. The service name is user-defined and visible on the Service Codes Detail subpage.
- **Service Type** – grouping of services by type. The service type is user defined and visible on the Service Codes Detail subpage.
- **Unit Type** – how each unit of service is measured (that is, hour, session). The unit type is user-defined and visible on the Service Codes Detail subpage.

**Note:** The utility will only return ACTIVE service codes.

## Effective date of change

The Effective Date of Change must be indicated prior to exporting services codes. This date indicated indicates the date that the new rates will go into effect. The system will use the indicated value (default value is the current date) as a default for each exported service code, but the dates can be adjusted on a code-by-code basis prior to import.

## Export to Excel

This Export to Excel button will not be active until you select one or more service codes. Once the service codes have been selected and the effective date of change has been set, click Export to Excel. A dialog box will open, prompting you to open, save, or cancel. WellSky recommends selecting Save and saving a copy of the exported file prior to adjusting rates.



File

Filters  
Fund Code [v] + Search Filters  
[Search] [Reset]

Number of service codes included on export: 7531

Export Preview:  
100 Export Provider Level Service Codes record(s) returned - now viewing 1 through 5

Service ID	Service Code	Service Name	Service Type	Service Category	Provider Name	Billable	Last Changed Date	Effective Date	End Date
35	0903.HF.HA	Behavioral Health Play Therapy: Adolescent	SA	Substance Abuse	A Woman's Place	False	08/04/2006	01/01/2006	
3052	0903.HF.HD	Behavioral Health Play Therapy: Preg	SA	Substance Abuse	A Woman's Place	False	09/25/2006	09/25/2006	
57	1002.HF	Behavioral Health Accomodation (Chemical Depend)	SA	Substance Abuse	A Woman's Place	False	08/04/2006	01/01/2006	
58	1003.HF	Behavioral Health Accomodation (Supervised Living)	SA	Substance Abuse	Family Guidance Center	False	08/04/2006	01/01/2006	
58	1004.HF	Behavioral Health Accom House)	SA	Substance Abuse	Olivia's House	False	08/04/2006	01/01/2006	

Effective Date of Change: 01/11/2019

Export to Excel Cancel

Export to Excel

## Indicating new provider-level rates

## Spreadsheet format

The exported spreadsheet has two major subsections:

- Informational Data
- User Input

**INFORMATIONAL DATA (DO NOT EDIT)**      **USER INPUT (UPDATE DATA HERE)**

INFORMATIONAL DATA ONLY (DO NOT EDIT)											USER INPUT (UPDATE DATA HERE)			
Service Code Data											Service Code Data			
Report Type	Provider ID	Provider Name	Service ID	Code	Name	Secondary Code	Unit Type	Billable	Last Changed Date	Last Changed Time	Current Effective Date	Current End Date	Current Rate	
Provider	221	A Woman's Pla 35	0903.HF.HA	1993	Behavioral Health	1993	15 mins	False	8/4/2006	2:25 PM	1/1/2006		\$12.50	
Provider	221	A Woman's Pla 35	0903.HF.HD	1993	Behavioral Health	1993	15 mins	False	9/25/2006	5:18 PM	9/25/2006		\$23.00	
Provider	221	A Woman's Pla 57	1002.HF	1992	Behavioral Health	1992	Day	False	8/4/2006	2:25 PM	1/1/2006		\$35.00	
Provider	298	Family Guidance	1003.HF	1993	Behavioral Health	1993	Day	False	8/4/2006	2:25 PM	1/1/2006		\$15.00	
Provider	345	Olivia's House	1004.HF	1884	Behavioral Health	1884	Day	False	8/4/2006	2:25 PM	1/1/2006		\$25.00	
Provider	18	MtB of Bbb-Pk 3238	101.HF	Residential Bed	B 101		Day	True	11/3/2008	11:59 AM	10/1/2008		\$37.42	
Provider	18	Chelsea Mental 3238	101.HF	Residential Bed	B 101		Day	True	11/3/2008	3:04 PM	10/1/2008		\$37.42	
Provider	362	Consumer Clns 3238	101.HF	Residential Bed	B 101		Day	True	4/30/2015	6:38 PM	4/30/2015		\$15.00	
Provider	221	A Woman's Pla 3238	101.HF	Residential Bed	B 101		Day	True	10/21/2014	5:17 PM	10/21/2014		\$0.60	

## Informational data

Data in the information section is provided for reference and should not be updated or altered by the user.

INFORMATIONAL DATA ONLY (DO NOT EDIT)													
Service Code Data													
Report Type	Provider ID	Provider Name	Service ID	Code	Name	Secondary Code	Unit Type	Billable	Last Changed Date	Last Changed Time	Current Effective Date	Current End Date	Current Rate
Provider	221	A Woman's Pla 35	0903.HF.HA	1993	Behavioral Health	1993	15 mins	False	8/4/2006	2:25 PM	1/1/2006		\$12.50
Provider	221	A Woman's Pla 35	0903.HF.HD	1993	Behavioral Health	1993	15 mins	False	9/25/2006	5:18 PM	9/25/2006		\$23.00
Provider	221	A Woman's Pla 57	1002.HF	1992	Behavioral Health	1992	Day	False	8/4/2006	2:25 PM	1/1/2006		\$35.00
Provider	298	Family Guidance	1003.HF	1993	Behavioral Health	1993	Day	False	8/4/2006	2:25 PM	1/1/2006		\$15.00
Provider	345	Olivia's House	1004.HF	1884	Behavioral Health	1884	Day	False	8/4/2006	2:25 PM	1/1/2006		\$25.00
Provider	18	MtB of Bbb-Pk 3238	101.HF	Residential Bed	B 101		Day	True	11/3/2008	11:59 AM	10/1/2008		\$37.42
Provider	18	Chelsea Mental 3238	101.HF	Residential Bed	B 101		Day	True	11/3/2008	3:04 PM	10/1/2008		\$37.42
Provider	362	Consumer Clns 3238	101.HF	Residential Bed	B 101		Day	True	4/30/2015	6:38 PM	4/30/2015		\$15.00
Provider	221	A Woman's Pla 3238	101.HF	Residential Bed	B 101		Day	True	10/21/2014	5:17 PM	10/21/2014		\$0.60

## Report type

The report type for Provider Level service codes is always “Provider.” This is used as a validation point during import.

## Provider ID and provider name

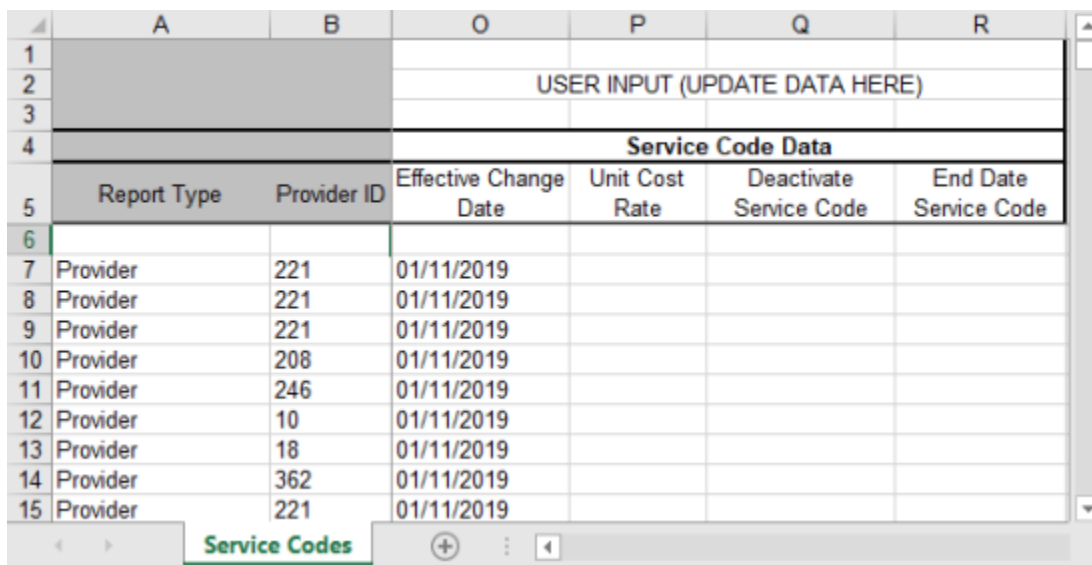
The Provider ID and Provider Name columns contain the WellSky-assigned vendor number and the name of the provider as it appears in WellSky Human Services.

## Service code data

The Service Code Data section contains a snapshot of key data visible on the Service Code Detail subpage in the Service Codes section of the utilities chapter.

## User input

The User Input section is the area of the spreadsheet where you can edit service code information. Do not adjust cell formatting.



	A	B	O	P	Q	R
1						
2	USER INPUT (UPDATE DATA HERE)					
3						
4	<b>Service Code Data</b>					
5	Report Type	Provider ID	Effective Change Date	Unit Cost Rate	Deactivate Service Code	End Date Service Code
6						
7	Provider	221	01/11/2019			
8	Provider	221	01/11/2019			
9	Provider	221	01/11/2019			
10	Provider	208	01/11/2019			
11	Provider	246	01/11/2019			
12	Provider	10	01/11/2019			
13	Provider	18	01/11/2019			
14	Provider	362	01/11/2019			
15	Provider	221	01/11/2019			

## Excluding service codes

If a service code is included on the exported spreadsheet that does not need to be updated, delete the row containing that service code.

## Effective change date (required)

This column will be pre-populated with the value specified at the time of export and indicates the start date of the new rate.

Example: Assume service code 123:AA currently has a rate of \$5.00. A new unit cost of \$6.00 with an effective change date of 2/1/19 is imported. The utility will end date the \$5.00 rate to 1/31/19 and will create a new unit cost of \$6.00 with a start date of 2/1/19.

The pre-populated date can be modified for each service code.

### Deactivate service code (optional)

If a service code is no longer going to be used, enter a “Y” in the Deactivate Service Code column. The deactivation will be effective as soon as the file is imported; there is no mechanism for indicating a specific deactivation date.

If the service code will remain in use, enter an “N” or leave the column blank.

### End date service code (REQUIRED unless the service code is being deactivated)

The new unit cost or rate should be entered in the Unit Cost Rate column. The new rate will have a start date equal to the effective change date.

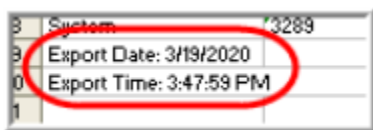
**Note:** The use of End Date Service Code is different at the provider and system levels. At the provider level, each unit cost is handled as a unique service code. At the system level, unit costs are child or sub-records of the service code.

Example: Assume that service code 123:AA is \$5.00/unit from 1/1/18 – 12/31/19 and is \$6.00/unit starting 1/1/19. At the system level, the record for 123:AA would show as a single service code with two rates. At the provider level, 123:AA would appear in the provider’s services list twice, once for each rate.

### Saving the spreadsheet

Save the spreadsheet when you’ve made the changes you need to make. When you save the file verify the following items:

- The file name ends in .xls
- All service codes that are not being updated have been deleted from the file
- All empty rows between the remaining service codes have been deleted
- The last two lines (export date and export time) are still there



- The effective change date column is populated for all service codes

### Importing service codes

When all rate changes are complete, upload the spreadsheet to the system. When the spreadsheet has been successfully imported, the new rates are immediately visible and in effect.

#### To import a spreadsheet

1. Open the **Rate Change utility**.
2. Click **Import Service Codes**. The Import Service Codes page opens.
3. Click **Browse** and select the file to import.
4. Click **Import Data**.

## Validation

If the file contains errors an error message will appear. If the error(s) are related to file format, the message will simply indicate that the file format is invalid. If the error(s) are related to missing or invalid data, the message will allow the user to open an Excel spreadsheet that indicates the specific errors by row and column. Only the first 500 errors in a file will be reported. In both instances, no data will be updated in the system.

Row	Column	Message
7	Effective Change Date	Message: The specified Effective Date (12/31/2007) must be later than the current Effective Date (1/1/2008). No changes will be made to this record.

## Validation for system-level service code imports

### Informational data

The application does not update any data contained in the Informational Data section of the spreadsheet, but it does check to make sure that key data is intact.

- **Report Type** – Must be “System” and must be populated for every service code.
- **Service ID / Service Name** – ID must be a number, ID must exist in the system, a combination of ID and name on import must match the combination of ID and name in the system, ID must be active.

### User input

Prior to updating any records, the system will validate key items in the User Input section of the spreadsheet.

- **Effective Change Date** – Must be a valid date and must be later than the current effective date.
- **Deactivate Service Code** – Must be “Y”, “N”, or blank.
- **End Date Service Code** – Must be a valid date and must be later than the effective change date.
- **Unit Cost Rate** – Must be a number with 2 decimal places.
- **Unit Cost Rate Type** – Must match a value in the RateType lookup in the system.
- **Unit Cost End Date** – Must be a valid date and must be later than the effective change date.
- **Unit Cost Credential** – Must match a value in the Credentials lookup.
- **Unit Cost Max Units** – Must be a number with 2 decimal places.
- **Unit Cost Max1** – Must be a number with 2 decimal places.
- **Unit Cost Max2** – Must be a number with 2 decimal places.

## Validation for provider-level service code imports

### Informational data

Though the system does not update any data contained in the Informational Data section of the spreadsheet, it does check to make sure that key data is intact.

- **Report Type** – Must be “Provider” and must be populated for every service code.
- **Service ID / Service Name** – ID must be a number, ID must exist in the system, a combination of ID and name on import must match the combination of ID and name in the system, ID must be active.
- **Secondary Code** – Must be present and unchanged.
- **Last Date Changed** – Must be present and unchanged.
- **Current Effective Date** – Must be present and unchanged.
- **Current End Date** – Must be present and unchanged.
- **Current Rate** – Must be present and unchanged.

### User input

Prior to updating any records, the system will validate key items in the User Input section of the spreadsheet.

- **Effective Change Date** – Must be a valid date and must be later than the current effective date.
- **Deactivate Service Code** – Must be “Y”, “N”, or blank.
- **End Date Service Code** – Must be a valid date and must be later than the effective change date.
- **Unit Cost Rate** – Must be a number with 2 decimal places.

## Rate Change utility: reports and related features

### Reports

Two reports are available to show all service codes and the history of changes for each rate change. These are accessed via the reports chapter.

- System Level Service Codes and Rates
- Provider Level Service Codes and Rates

### Related features

The Rate Change utility is often used in conjunction with the Authorization utility. Typically, rate changes would be made, and then existing authorizations would be updated to reflect the new rates (mid-year rate changes), or new authorizations would be created (new FY).