This user guide assumes a contracting provider and its programs already exist in CalPM, and only covers what needs to be done in MSO.

Setting up a Contracting Provider (CP), and its Contracting Provider Programs (CPP) in MSO, requires that the agency (contract provider), programs (RUs), and performing providers we will create and associate in MSO, first exist in CalPM. MSO and CalPM use different terminology for equivalent items as follows:

Program of admission in CalPM = Contracting Provider in MSO

Program of service in CalPM = Contracting Provider Program in MSO

Practitioner in CalPM = Performing Provider in MSO

Service Codes in CalPM = CPT Codes in MSO

The forms that need to be used to set up a contracting provider in MSO are:

1. ***Applying Contracting Provider***
   1. 1st step in creating a Contracting Provider. Make sure the provider you will set up already exists as a program of admission in the CalPM side. This form enters the CP in the system as applying, not yet as registered. We will register them in a later step.
2. ***Performing Provider Registration***
   1. To create a Performing Provider (PP) in MSO (Hint: this staff needs to exist in CalPM as practitioner – verify the staff ID they have in the Practitioner Enrollment form in CalPM, and use that number to register them as Performing Providers)
3. ***Contracting Provider Registration***
   1. To actually create the Contracting Provider (CP )
   2. To add the Contracting Provider Program (CPP) associated with a CP (e.g. South Coast is a CP, and all its RUs are its CPP) - These programs need to exist in CalPM as programs of service
   3. To associate the PP to the CP
4. ***Provider Fee Definition***
   1. To enter rates for the service codes providers are allowed to provide. This step needs to be done before we create the P-Auth. If we don’t have codes and rates associated to the programs, the Contracting Provider Service Authorization (CPSA) form will not provide a list of codes we can add.
5. ***Contracting Provider Service Authorization (CPSA)***
   1. To create the P-Auths. These authorization numbers are required on each claim line in an 837 file, in order for the system to know which program provided the service. We will give the numbers to the contract providers so they can put them in the file.
6. ***Contracting Provider 835 Defaults*** 
   1. To define information that will appear in the 835 file for a CONTRACTING PROVIDER
7. ***MSO to Parent System Mapping***
   1. Form used to map elements in MSO to CalPM, to allow for push of services.

In here we map:

MSO Contracting Providers to CalPM programs of admission (Page (section) 1)

MSO Performing Providers to MSO Contracting Provider Program, to CalPM program of service and to CalPM Practitioners (Page (section) 4)

1. ***Applying Contracting Provider*** form

Search for the Applying Contracting Provider form

Select and double-click on the form

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Search for the Contracting Provider first by the number their Program of Admission has in CalPM (e.g. 01006) and then by their name (e.g. Desert Mountain). If nothing appears on the dynamic list, it means the Contracting Provider needs to be created. Click the New Provider button

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Select NO to *Auto Assign Next ID Number?*

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Enter the number assigned in CalPM to the Program of Admission (this can be Legal Entity number for MH OP Mode 15 programs, or the first four digits of their Provider number assigned by MediCal preceded by two zeros (e.g. 008653) for mode 5/10 MH or SUD programs)

Once the form opens, complete it as follows:

*Application Date*: as applicable. For TRAIN, we are using 01/01/2018

*Type of Contracting Provider*: Always use Facility

*Name*: Use naming convention of Name, space, dash, Legal Entity number (or first four digits of provider name) (e.g. South Coast Community Services - 00916, Aegis Treatment Center - 003656)

*Type of Contact* - Phone

Complete Address fields as applicable

Adding notes is not required

Click *Submit*

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1. ***Performing Provider Registration*** form

We will need the list of a contract providers' staff, so we can add them as ***Performing Providers*** in MSO. These staff members must first exist in CalPM as practitioners, and ideally we should register them using the same number they have in CalPM.

Search for ***Performing Provider Registration*** form

Select it and double-click to open

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Search for provider both by the name and/or by the number they show in CalPM Practitioner Enrollment to pull record. (Need to search both ways because practitioners can have different ID in MSO). If practitioner is not found, click the New ***Performing Provider*** button

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 Choose NO to *Auto-Assign Next ID Number?*

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Enter the number they have in CalPM.

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Click OK

***Performing Provider Registration*** form opens

*Performing Provider Information* section: Here you enter the performing provider’s general information.

*Name* -use the naming convention LASTNAME,FIRSTNAME (NO SPACE)

*Registration Start Date* – Use their start date in CalPM

Performing Providers must have at least one License Type on record. Complete the fields in the following order:

1. *Primary License Type Effective Dates*: Click and select Create New
2. *Performing Provider's License Type* field - select their discipline
3. *Primary License Type for Claims* - select their discipline
4. *Effective Start Date* - complete as appropriate
5. Click on the *File Primary License Type Effective Date* button
6. No need to complete anything in the Performing Provider’s License section
7. Click the Submit button

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Register as many Performing Providers as needed until all providers in the list are in MSO.

1. ***Contracting Provider Registration*** form

Search for the form

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Type number or name in the Select Provider pop-up (this will populate from the Applying Contracting Provider completed in step 1)

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Select P rovider 

Double-click on it, and form opens

How to complete this form:

*Contracting Provider Registration* section – here you enter a contracting provider general information

*Type of Contracting Provider*: Select FACILITY always. This allows to be able to use the functionality in MSO because all the different locations

*Submitter Identifier*: Use Legal Entity # for MH or the 4-digit Provider # for SUD - used to match file to provider. We need to provide this to contract providers so they can put it in their 837.

*Name* and *Address* fields prepopulated from Applying Contracting Provider

*Date*: the date assigned in Applying contracting Provider form

*In Network* - Needs to always be In Network

*Eligible Funding Source* - as appropriate (MH or SUD)

*Use Eligible Funding Source to Determine Funding Source for 837 Processing field:* Select Yes

*Tax ID* – Enter if we have it. Not required

*Tax Payer ID#* - Not used for tax, and can use the legal entity# or the main NPI#

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*Contact Information* section – this is not a required section. In this section we can enter who we can contact for 837. Add items as needed by clicking *Add New Item* button.

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*Contracting Provider Programs Information* section - Here is where we add the Contracting Provider Programs that will map to Programs in CalPM.

To add a program, click the *Add New Item* button. Complete Program Name, Main Program Address, Facility ID Code qualifier, and Facility ID Code fields.

*Program Name* – Follow naming convention of RU number, space, dash, space, RU name

Enter *Main Program Address* and *Zip Code*

*Facility ID Code Qualifier* - Always Health Care Financing Administration NPI

*Facility ID Code* - Facility NPI - REQUIRED

Add programs as necessary by clicking the *Add New Item* button until you are done with all the programs that need to be associated with this contracting provider

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*Performing Provider's Information* section: Here is where we associate the performing providers to a contracting provider. We need to associate the performing providers we registered on step 2:

Click the *Add New Item* button

*Performing Provider* field: Type Performing Provider's ID or last name. Select the desired provider from the dynamic list and double-click.

The required fields auto populate (Just by doing this, you have associated a provider).

Continue adding as many performing providers as needed by clicking the *Add New Item* button as many times as needed until all the performing providers in the list have been associated to the contracting provider.

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*Performing Providers License information* section: This section does not need to be completed because License information is in CalPM Practitioner Enrollment.

*837 Defaults*section – In these section we define some data elements MSO will be looking for in a contracting provider’s 837 file.

*Require Exact Authorization Number (Professional)* - this is for P-Auths, so this should be set to Yes on all Contracting Providers.

*Support Population of Duration (units duration in claim)* - Needs to be YES, and need to request from providers to change UN to MJ in 2400-SV103

Ignore ***Price the following CPT Codes….*** and ***Price the following Procedure Code Group***… fields - no need to select anything….

Set the rest of the fields as fields as NO

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Click the ***Submit*** button

1. ***Provider Fee Definition*** form

The service (CPT) codes and their fees by program need to be in MSO before creating the P-Auths for the programs. We need to add fees only to the services allowed (like in Provider Balance). If service code is not allowed, do not enter rate.

Fees can be entered manually, or in an upload file:

**Manually:**

Search for the Provider Fee Definition form

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Select and double-click on it

In the Provider Fee Definition section, select *Enter New* (or Edit Existing)

*Procedure Code type or Group Fee Definition* = CPT Service Code

*Provider* = Name of the Contracting Provider (e.g. Desert Mountain Children's Center - 01006)

*CPT Service Code* = Select the code for which you are going to add a fee (rate) Note: the dropdown list is in alphabetical order. You can type the first letter of the code description to search faster)

*Contracting Provider Program* = The program (RU) for which rates are being entered. This is similar to the provider balance, so rates will be entered for all the direct services codes (billable and non-billable) that a program can use. No need to enter indirect services as contract providers cannot upload indirect services via the 837. For non-billable codes enter rate of 0.00

*Effective Date*: e.g. 01/01/2018

*Amount*: enter rate here

*Status*: select Active

*Allow Duplicate Services on the Same Day* - Select Yes

Click the ***Submit*** button

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Make sure you are populating the *Contracting Provider Program* field each time after clicking the *Submit* button, because the field clears every time you click submit. The system will allow submitting the form without a program, but then the program will not have the rate/service code associated with them and if they send a service in the 837 the service will be denied (rejected?).

Do this as many times as needed until all the codes for direct services they are allowed to provide have a fee.

**Upload file:**

The file is in text tab delimited format. To create one, follow the Excel File Import Layout document provided by Netsmart.

Search for the ***Provider Fee Definition*** form

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Select and double-click on it

In the *Provider Fee Definition Upload* section, click the *Select File* button

Navigate to the location of the file, select the file and double-click on it

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The *Filename* field is now populated with the file selected. Click *Process File Upload* button

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Process File Upload 
Print Error Report 

Once the file uploads, an informational message will appear with the stats of the upload, stating the number of records read, number of records accepted, and number of records rejected due to errors.

If there were errors, click in the Print Error Report button to see the errors. For testing, fix the errors, and resubmit a file with the records that errored out.

For production, research the errors, provide the errors to the provider so they can fix and resubmit a file with the rejected records, or request they enter services manually.

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Sample of Error Report

After this, the fees are in the system.

1. **Contracting Provider Service Authorization**

This form is used to create the P-Auth numbers needed on the 837 files.

Search for the ***Contracting Provider Service Authorization*** form

In the *Select Provider* box, type the name or number of the Contracting Provider

Select the contracting provider from the dynamic list

Click the *Select* button

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If the Contracting Provider does not have any P-Auths, the system will take user straight to the form

If the Contracting Provider has P-Auths for some of its programs already, the Contracting Provider Service Authorization predisplay appears, and user can select to *Edit* an existing authorization, or *Add* a new one. In this case, because we need tTo create P-auths, select *Add*

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Some fields are already populated when the form opens, like the *Authorization Number* (P-Auth), *Funding Source*, and *Benefit Plan*. User needs to complete:

*Contracting Provider Program* (select from the dynamic list. This list shows the programs that were associated to the Contracting Provider in the *Contracting Provider Registration* form)

How to fill this form:

*Initial or Continuing Authorization* - select Initial

*Current Authorization Status* - Select Approved

*Begin Date of Authorization* - complete as appropriate

*End Date of Authorization* - DBH-IT will need to standardize the period we will allow. Most P-Auths in the system are set to expire around 2050, but this could change once a convention is established.

*Authorization Grouping Or individual Authorization* - Select Individual

*Procedure Code Type (1)* - Select CPT Code

*Code Authorized* - select one of the codes they will be authorized to provide

Click *Submit*

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A message asking if you want to return to predisplay will appear, click yes if you need to add more P-Auths.

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Add P-Auths as necessary until there is one P-Auth for each of the programs associated to the Contracting Provider Program.

Keep in mind that once we open the *Contracting Provider Service Authorization* form for a Contracting Provider, the auto-generated P-number will not be used again even if we don’t submit the form. For this reason, the P-Auth numbers of some programs might not be sequential. As best practice, try to only open this form when you are ready to create a P-Auth (Hint: do not attempt to create P-Auth if you have not added the Provider Fees yet. MSO will not let you add CPT codes until there are rates).

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01/01/2018 
Cancel 

Example of all the P-Auths for Mountain Desert

1. ***Contracting Provider 835 Defaults*** form

Search for the form, select, and double-click on it to open

*Contracting Provider* *835* section – This section is to define the data elements that will appear in the ISA loop of the 835 Avatar will generate

Machine generated alternative text:
Contracting P rovider 835 Defaults 
a Contracting ProvWer 835. 
a 835 Defaults 
Submit 
ID (ISA-S 
ID (IS A-On 
(IS A- 14) 
835 Cefwle 
(IS A-02) 
(IS A-03) 
(ISA-W 
(IS A-OS) 

*Contracting Provider* - Select appropriate

*Interchange Sender ID (ISA-06)* - use 36 (might need to add thirteen zeros as field requires 15 characters)

*Interchange Receiver ID (ISA-07)* - use the Contracting Provider ID (might need to add enough zeros to complete fifteen characters)

*835 Defaults* section

*Provide 837 Claims Rejected Due to Critical Errors on* 835 - No

*Application Sender's Code (GS-02)* - enter 36

*Application Receiver's Code (GS-03)* enter the Contracting Provider ID

*Transaction handling Code (BPR-01)-* Remittance Information Only

*Total Actual Provider Payment Amount (BPR-02*)- Sum of Claim payment Amounts

*Payment Method code (BPR-04)* - Non Payment Data

*Originating Company Identifier (TRN-03)* - 1000000000

*Payer Name (1000A-N1-02)* - county of San Bernardino

*Payer Address (1000A-N3)* - 303 E Vanderbilt Way

*Payer Technical contact Name (1000A-PER-02)* - Niema Burrell (?)

*Payer Zip Code (1000A-N4-03)* - 92415-0026

*Payer City Name (1000A-N4-01)* and *Payer State (1000A-N4-02*) auto populate

*Payer Technical contact Communication Number Qualifier (1000A-PER-03)* - Telephone

*Payer Technical contact Communication Number (1000A-PER-04*) - 909 388 0900

*Payee Name (1000B-N1-02*) - Contracting Provider Name

*Payee Identification Code Qualifier (1000B-N1-03)* - Health Care Financing Administration National Provider Identifier

*Payee Identification Code (1000B-N1-04)* - enter NPI

*Payee Address Line 1 (1000B-N3-01)* - enter address

*Payee Zip Code (1000B-N4-03)* - enter zip code

*Payee City* and *Payee State* auto populate

*Payee Additional Reference Identification Qualifier (1000B-REF-01)* - Select Federal Taxpayer's Identification Number

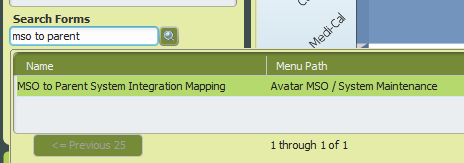
*Payee Additional Reference Identifier (1000B-REF-02) -* Fed Taxpayer ID



1. ***MSO to Parent System Integration Mapping*** form

This form is used to map contracting provider, contracting provider programs, and performing providers in MSO to programs of admission, programs of services, and practitioners in CalPM. This is needed to ensure that services uploaded to MSO, push correctly to CalPM. Not having all the necessary elements mapped, will cause denials or service failure to push to CalPM.

Search for the form, select from list, and double-click to open.



The form is divided in sections (called pages by Netsmart). Each section that has a *File* button, is a page.

To correctly map Contracting Providers in MSO:

* Use *Page 1* (section 1) to map MSO Contracting Provider to PM Program of Admission. Use generic performing provider (only done once).

* Use *Page 4* (section 4) to map MSO Performing Providers to MSO Contracting Provider Programs and to map the MSO portion to PM Programs of Service and PM Practitioners. (There should be as many mappings as many possible combinations. E.g. 10 programs and 10 providers would require 100 mappings (10 \* 10))

Hint: In the *MSO to Parent System Integration Mapping* form, everything on the left side of a page represents what is in MSO, and everything on the right side represents how is it mapped to CalPM.

Machine generated alternative text:
MSO to Parent System Integration Mapping 
a MSO to Parent System Int 
a Service Filing 
a Mapping Upload 
a Mapping Delete 
ID Num—- 
-MSO service code 
CPT cay. 
_CPT code 
—Staff 
Num'. 
use Less Detailed Mapping 
Page 2 
—Staff 
use Less Detailed Mapping 
—j Page 3 
—Staff 
use Less Detailed Mapping 
Page 4 
use Less Detailed Mapping 
File Page 5 
Page 1 

MSO to Parent System Mapping form pages layout

***Page 1***

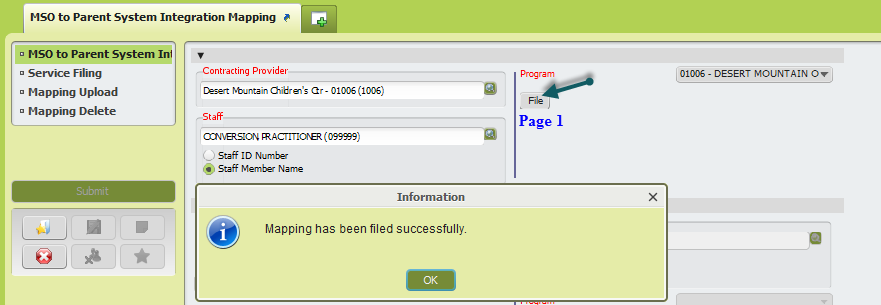
Mapping on this page needs to be done only once per Contracting Provider

*Contracting Provider* - Select from dropdown list as appropriate

*Staff* - Select to search by Staff Member Name, and select the generic staff (Conversion Practitioner)

*Program* - Select the Program of Admission in CalPM to which the MSO Contracting Provider needs to map to (this is necessary in order for the services pushing from MSO look (and find) the correct episode that the service will fall under once it pushes to CalPM

Click the *File* button



***Page 4***

*Contracting Provider* - Select *Contracting Provider* as appropriate. Note that only programs for which a user has completed a Contracting Provider Registration will appear on the list.

*Contracting Provider Program* – Select a program form the list. The list will be populated with the programs that were associated to a contracting provider in the *Contracting Provider Registration*

*Performing Provider* - select provider from the list. The list will be populated with the performing providers that were associated to the contracting provider in the *Contracting Provider Registration*

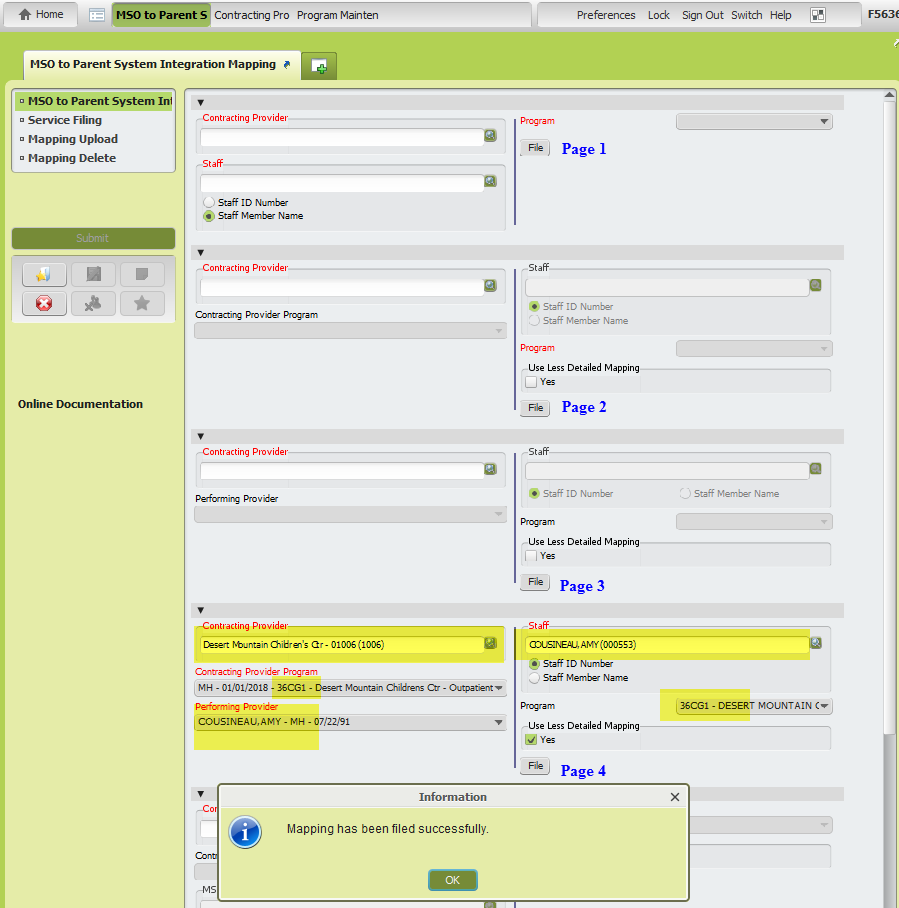
*Staff* - search for the practitioner in CalPM to which the performing provider needs to map to. User will need to search by number and by name. When in doubt, the user will need to check both the *Practitioner Enrollment* form and the *Performing Provider Registration* form to verify the staff has same NPI and discipline/license

*Program* - search for the program of admission in CalPM to which the MSO program maps to

Select the *Yes* box on the *Use Less Detailed Mapping* field

Click the *File* Button

This mapping will need to be done for all the possible program/staff combinations in both MSO and CalPM (e.g. 5 performing providers and 5 programs will require 25 mappings [5\*5])



 To verify the mappings were done correctly, a user can verify existing mappings using the *Mapping Delete* section.

If nothing populates in the PM side of the page when making selections in the MSO side, it means those elements are not mapped.

Once the user verifies the mappings are correct, the user should close the form without submitting it, as user will not want to delete any existing mappings.

Machine generated alternative text:
MSO to Parent System Integration Mapping 
@cous1NEAu, 
3ECG1 - DESERT MOUNTAIN CHILDRENS CENT(3€CG1) 
3€CGE - DESERT MOUNTAIN SELPA(3.scGE', 
3€CGE1 - DESERT MOUNTAIN CNTR(3.scGE1) 
a MSO to Parent System Inl 
a Service Filing 
a Mapping Upload 
a Mapping Delete 
Online Docu mentation 
Chi+*s Ctr - 
_j sciil op (823 
souTH COAST COMMUNITY SERVICES 
%CGE - Sap Chi+*s Ctr - 
%CGEI - 
AMY 
A Myppir.*) 
ElcEa3.SCG1- c—-t Ma-main DESERT MOUNTAIN CHILD 
- c—-t - DESERT SELPAk'3ECE 
»36CGE1 - Dwt Childers DESERT MOUNTAIN 

Figure shows how Performing Provider Cousineau, Amy is mapped to three Contracting Provider Programs on the MSO side, which in turn are mapped to staff Cousineau, Amy (00553) and the same three programs in the CalPM side

Please note that although sometimes we will need to do mappings manually, there is a Mapping Upload that can be used to speed the process of mapping.