

# SHARECARE RELEASE NOTES

Version 9.0.3

## INTRODUCTION

ShareCare version 9.0.3 includes some bug fixes and seven new screens for Phase II of the HIPAA 274 (Provider Directory) Implementation for collecting, updating, and managing the required submission data. These new screens are detailed in the Statement of Work section below.

## SAAS CUSTOMERS

Echo support will contact you to determine the best time to install this version.

## SELF-HOSTED CUSTOMERS

**Do not install this version until 9.0.2 has been installed.**

IT IS HIGHLY RECOMMENDED THAT YOU PERFORM AND VERIFY A FULL DATABASE BACKUP PRIOR TO INSTALLING ANY UPGRADES, ENSURING THAT YOUR DATABASE CAN BE RESTORED IF NEEDED.

Please note that users will be unable to access ShareCare while the version is being installed. If you have any questions about this process or items requiring Administration, please contact Echo Technical Support at (510) 238-2727 or email [support@echoman.com](mailto:support@echoman.com).

## STATEMENT OF WORK

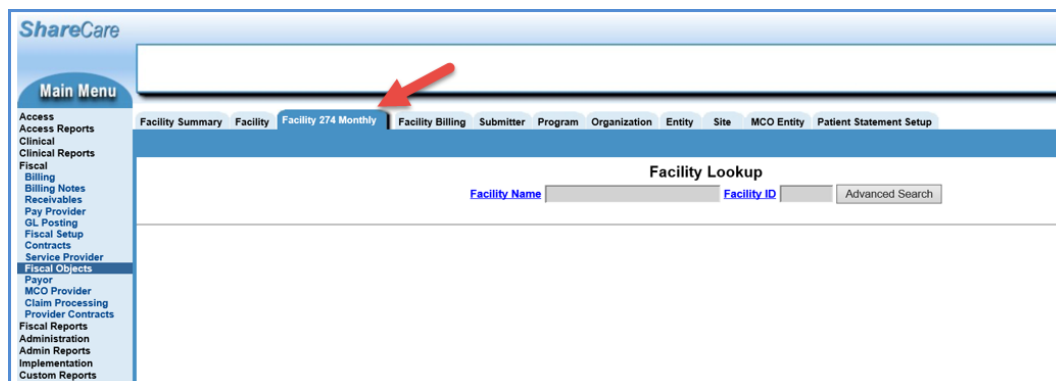
### Overview - HIPAA 274 (Provider Directory) Implementation – Phase II

The California Department of Health Care Services is implementing a Health Care Provider Directory (HIPAA X-12 274 Transaction set) requiring counties to replace the current NACT reporting format with the new 274 submission format in the Fall of 2021. The seven new screens listed below are included in this release for collecting and managing the required data.

- [Facility 274 Monthly](#)
- [Service Provider 274 Monthly](#)
- [Provider Organization 274 Monthly](#)
- [MCO Provider 274 Monthly](#)
- [Service Provider Monthly Data Maintenance](#)
- [Service Provider Monthly Data Admin Review](#)
- [Service Provider Monthly Data](#)

### Facility 274 Monthly

The *Facility 274 Monthly* screen captures additional Facility data that changes monthly. The screen is located between *Facility* and *Facility Billing*.

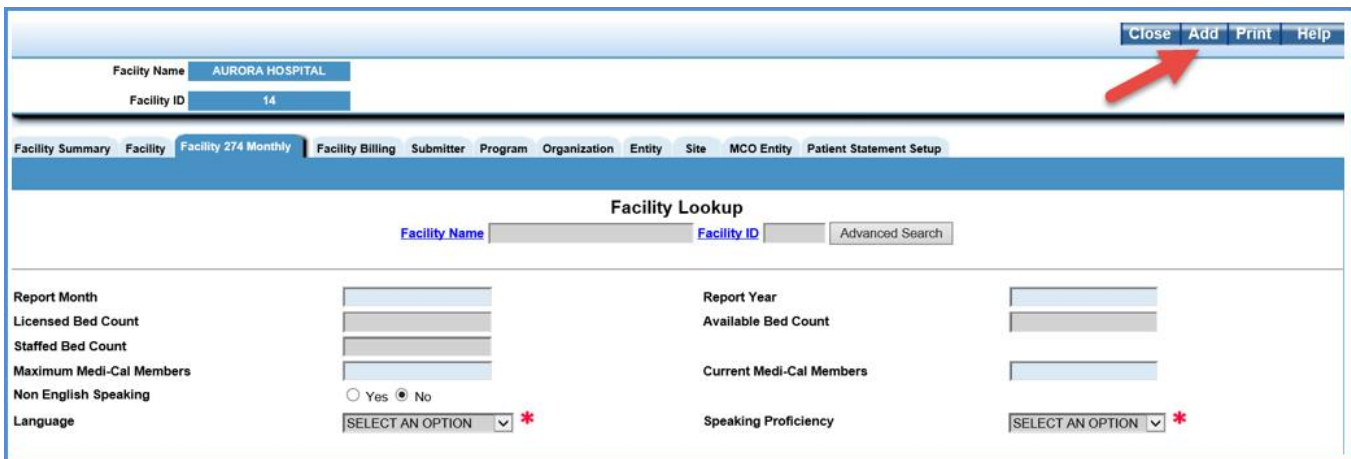


A user must have the **Facility** “User Group” access and the appropriate screen access for the following operations. An error message displays if the user is not authorized to access the selected Facility.

- **Insert** – Enter a Facility Name or ID.
  - A hyperlink is provided to lookup Facility by Name or ID.
  - An error message displays if there is an existing record with this key.
- **Lookup** – Enter Facility name or ID, Report Month, and Report to locate a record.
  - An error message displays if there is no matching record.
  - Click the “Close” button when done.
- **Update** – Enter Facility and Provider to locate the record to update.
  - An error message displays if there is no matching record.
  - Enter changes and click the *Update* button when done.
- **Delete** – Enter Facility Name or ID and then tab to locate records for update.
  - An error message displays if there is no matching record.
  - Click the *Delete* button to archive the selected record.
  - Otherwise, click the *Close* button to exit without deleting the record.

The steps to insert a new record is shown in the example below.

1. Enter the Facility Name or ID (or use the blue hyperlinks). Once Facility is identified, click the *New* button.
2. Enter data and then click the *Add* button to insert the record.



Close Add Print Help

Facility Name **AURORA HOSPITAL**  
Facility ID **14**

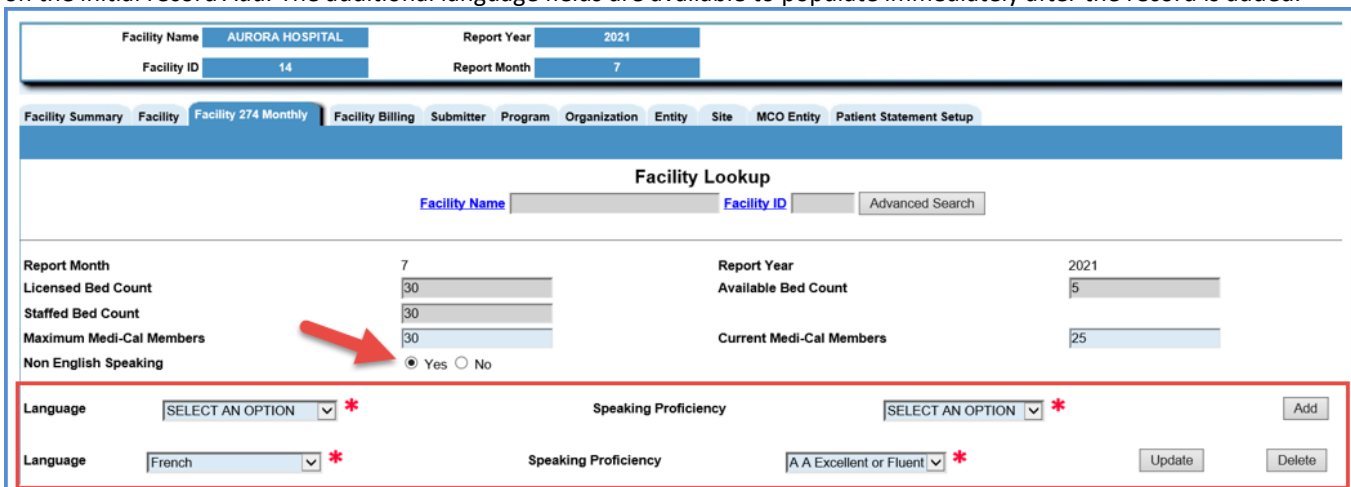
Facility Summary Facility **Facility 274 Monthly** Facility Billing Submitter Program Organization Entity Site MCO Entity Patient Statement Setup

**Facility Lookup**

Facility Name  Facility ID  Advanced Search

Report Month  Report Year   
 Licensed Bed Count  Available Bed Count   
 Staffed Bed Count   
 Maximum Medi-Cal Members  Current Medi-Cal Members   
 Non English Speaking  Yes  No  
 Language  \* Speaking Proficiency  \*

If *Yes* is selected for the *Non English Speaking* field, then at least two languages must be entered. The first language can be added on the initial record *Add*. The additional language fields are available to populate immediately after the record is added.



Facility Name **AURORA HOSPITAL** Report Year **2021**  
Facility ID **14** Report Month **7**

Facility Summary Facility **Facility 274 Monthly** Facility Billing Submitter Program Organization Entity Site MCO Entity Patient Statement Setup

**Facility Lookup**

Facility Name  Facility ID  Advanced Search

Report Month **7** Report Year **2021**  
 Licensed Bed Count **30** Available Bed Count **5**  
 Staffed Bed Count **30**  
 Maximum Medi-Cal Members **30** Current Medi-Cal Members **25**  
 Non English Speaking  Yes  No

Language  \* Speaking Proficiency  \*

Language **French** \* Speaking Proficiency **A A Excellent or Fluent** \*

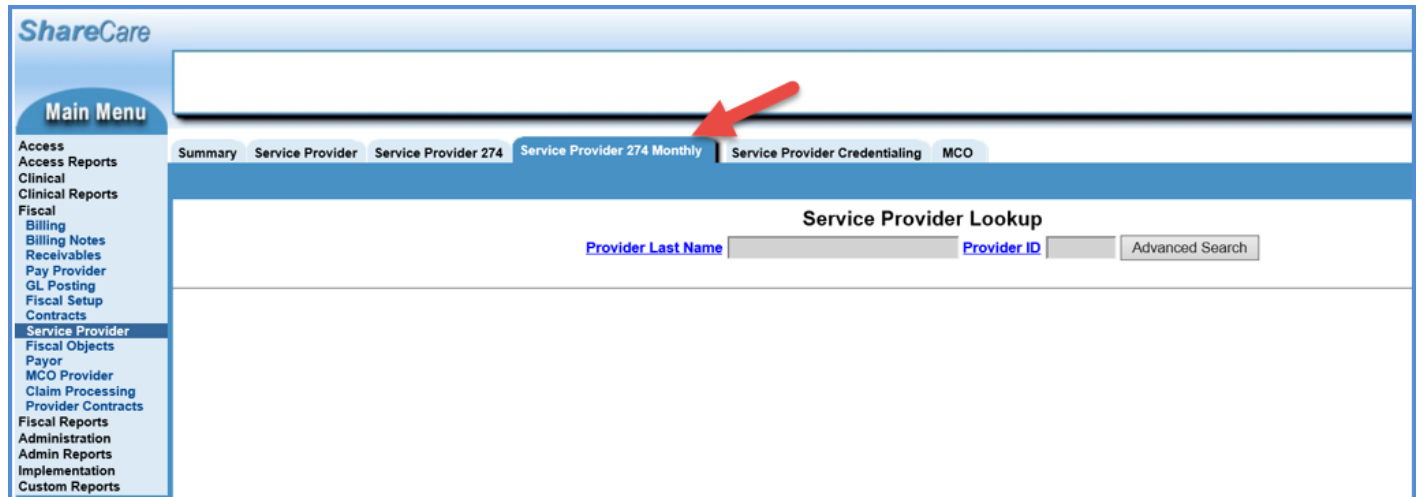
One *Language* must be English with a *Speaking Proficiency* of “Poor,” and one (or more) other *Language* must have a *Speaking Proficiency* of “Excellent.” See the note in the fields table below.

The table below lists the fields in the *Facility 274 Monthly* screen.

Field Label	Required	Validation	Comment
Facility Name	YES	Existing facility	Must enter either Facility Name or Facility ID.
Facility ID	YES	Existing facility	Must enter either Facility Name or Facility ID.
Report Month	YES	1-12	
Report Year	YES	4-digit year	
Licensed Bed Count	NO		
Available Bed Count	NO		
Staffed Bed Count	NO		
Maximum # Medi-Cal Members	YES		
Current # Medi-Cal Members	YES		
Non English Speaking	YES		
<p><b>Important: If this site does not provide services in English, then at least two languages must be entered.</b></p> <p><b>1. English – (HIPAA XREF Code = "ENG") and select Speaking Proficiency with HIPAA XREF Code = "4" (Poor).</b></p> <p><b>2. One or more other languages in which a service is provided and its Speaking Proficiency must be "Excellent".</b></p>			
Language		Option List	The drop-down list values pull from the standard <i>Language</i> Option List. <i>The ShareCare administrator should review and update the HIPAA XRef column as needed.</i>
Speaking Proficiency		Option List	The drop-down list values pull from the 274 Speaking Proficiency Option List.

### Service Provider 274 Monthly

The *Service Provider 274 Monthly* screen captures **monthly** Provider data specific to a Facility that changes each month. The screen tab is located immediately next to the *Service Provider 274* tab. Records created via this screen should be **per Provider, per month, per Site (Facility)**. For example, if you have a provider who works at three different facilities, enter three records for this provider **every month** – one for each Facility.



The screenshot shows the ShareCare application interface. On the left is a 'Main Menu' with various options like 'Access Reports', 'Clinical Reports', 'Fiscal', 'Billing', etc. The top navigation bar has several tabs: 'Summary', 'Service Provider', 'Service Provider 274', 'Service Provider 274 Monthly' (highlighted with a red arrow), 'Service Provider Credentialing', and 'MCO'. Below the navigation bar, the 'Service Provider Lookup' section is visible, containing input fields for 'Provider Last Name' and 'Provider ID', and an 'Advanced Search' button.

Users may not create a new record in the *Service Provider 274 Monthly* screen unless the following requirements are satisfied.

- The Facility is created.
- The Service Provider is created.
- The Provider’s Facility Authorization is created to link the provider with the Facility.
- Both the Facility and Service Provider are active (partially active is okay) during the submission year/month.

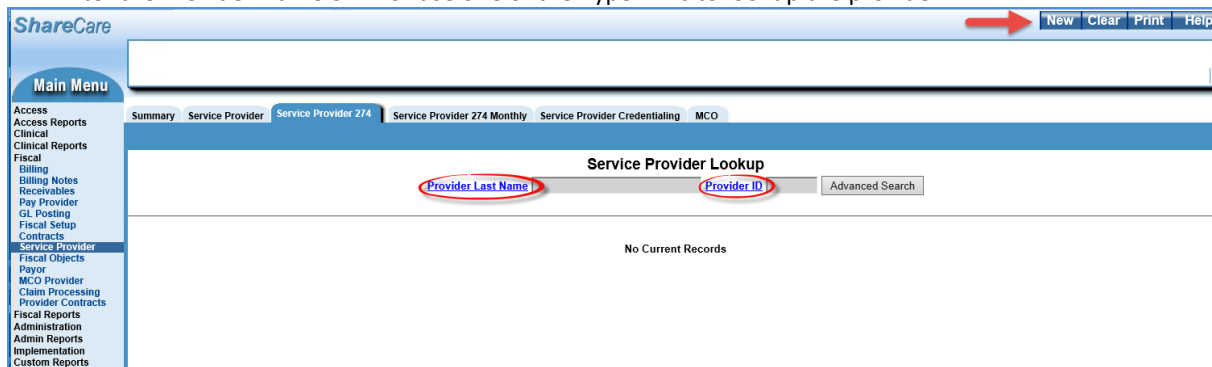
Users must also have **Facility** and **Service Provider** “User Group” access and the appropriate access for the following operations. (i.e., the user must be authorized to access the Facility and the Service Provider) An error message displays if the user is not authorized to access the selected Facility or Service Provider.

- **Insert** – Enter a Provider Name or ID
  - A hyperlink is provided to lookup Provider by Name or ID.
  - Select the New button and begin data entry.
  - When finished select Add to insert the record.
  - Otherwise, select Close to leaving without inserting the record.
- **Lookup** – Enter Provider by Name or ID and then tab to see available records.
- **Update** – Enter Provider by Name or ID and then tab to see available records.
  - Select the Update button to the right of desired record.
  - Enter changes and select the *Update* button (upper right) to save the changes.
  - Or select the *Close* button to exit without updating.
- **Delete** – Enter Provider by Name or ID and then tab to locate records for update.
  - Select the *Delete* button, to the right at the end of the row, to archive the selected record.
  - Otherwise, select the *Close* button to exit without deleting the record.

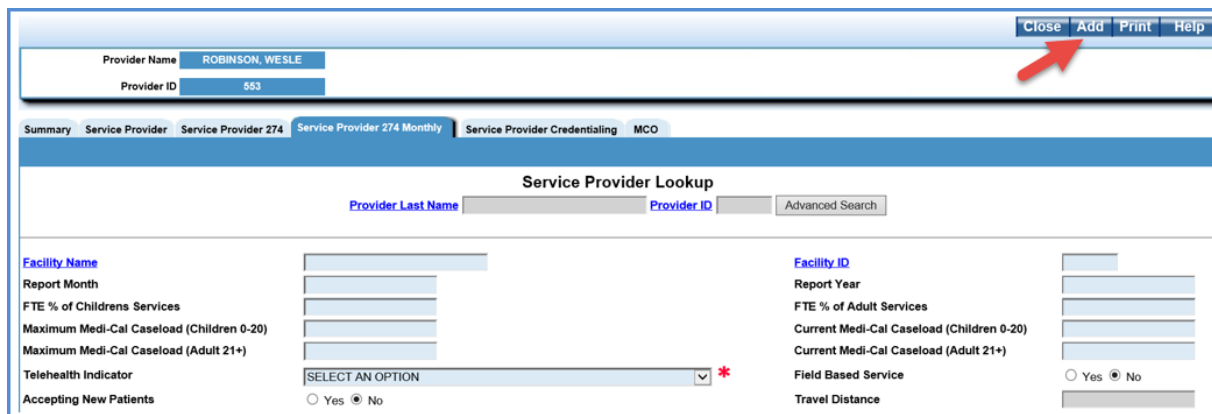
**Examples**

**Insert** - The steps to insert a new record are shown in the example below.

1. Enter the Provider Name or ID or use one of the hyperlinks to lookup the provider.



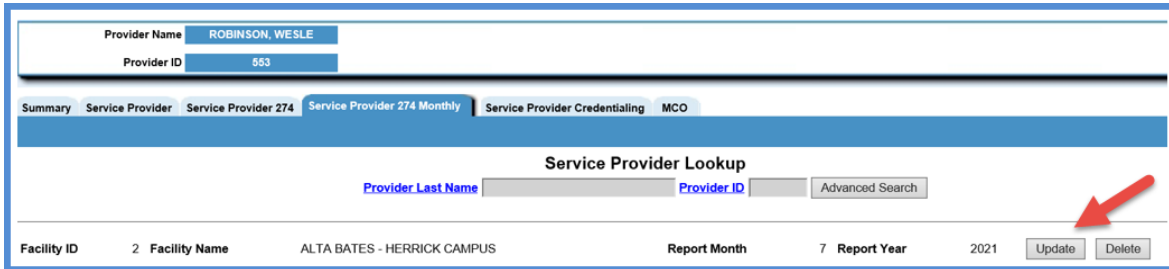
2. Select a Provider and click the *New* button to begin data entry.



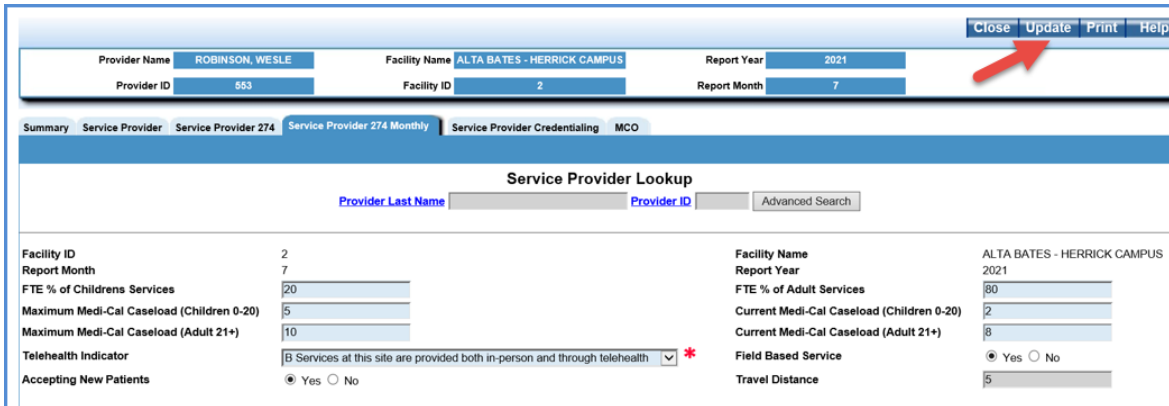
3. When data entry is complete, click the *Add* button to insert this record.

**Lookup and Update** – The steps to lookup and update a record are shown below.

1. Enter a Provider by Name or ID, then tab to lookup available records.



2. Select a record and click on the *Update* button.

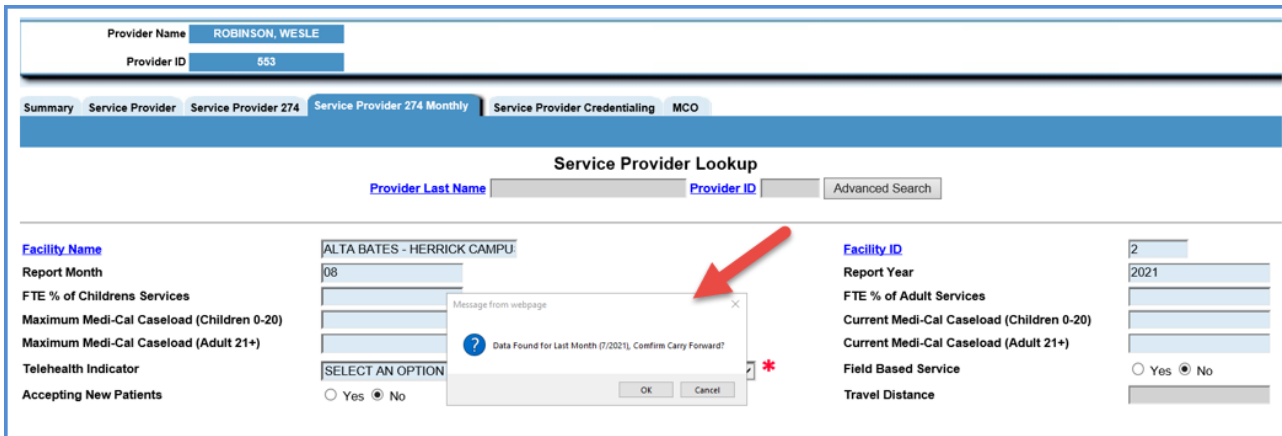


3. Modify the data, and then select the *Update* button to record the changes. Or select the *Close* button to finish the session without any updates.

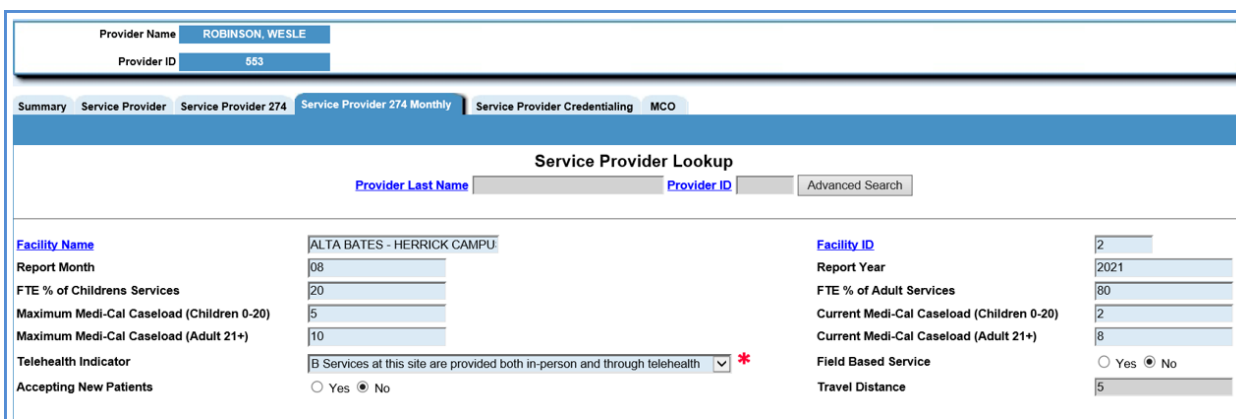
**Delete** – Follow the same steps to *Lookup* (step 1 above). Identify the record and select the *Delete* button to archive the record.

### Special Feature

A “carry forward” function is available in this screen for the purpose of reducing the data entry burden. When *New* is selected (for new entry) and the Facility and Month/Year is entered, a popup box appears if a prior month record exists for this Facility/Provider. This popup box contains the message “**Data found for last month (nn/yyyy), Confirm Carry Forward?**”.



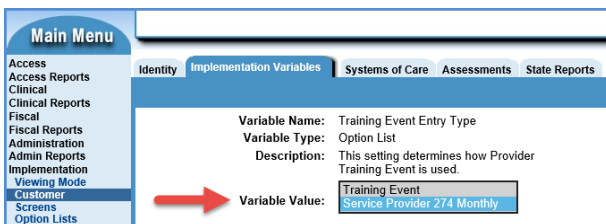
Answer *OK* to populate the rest of the fields with previous month’s data (shown below).



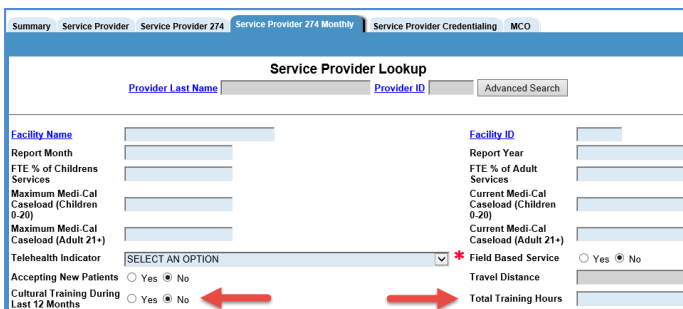
This data may be optionally updated. If *Cancel* is selected in the popup box, the screen proceeds to data entry without copying data from a prior month.

### Cultural Competence

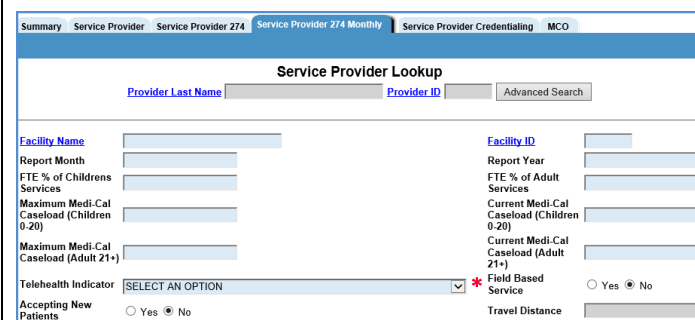
Counties can opt to use the Training Event screen in *Fiscal > Service Provider > Service Provider Credentialing* to record Cultural Competence training hours. A second option is available which requires entry of Cultural Competence information in the **Service Provider 274 Monthly** screen. The new global option which controls how Cultural Competence training is recorded is found in *Implementation > Customer > Implementation Variables*. Select the Training Event Entry Type Option List. By default, the Service Provider 274 Monthly variable is selected in the Training Event Type Option.



If the Service Provider 274 Monthly value is selected, the user must enter the Cultural Competence data on the Service Provider 274 Monthly screen. The two fields indicated below display when this option is selected.



If the Training Event option is selected, the two training fields are not displayed on the Service Provider 274 Monthly screen.



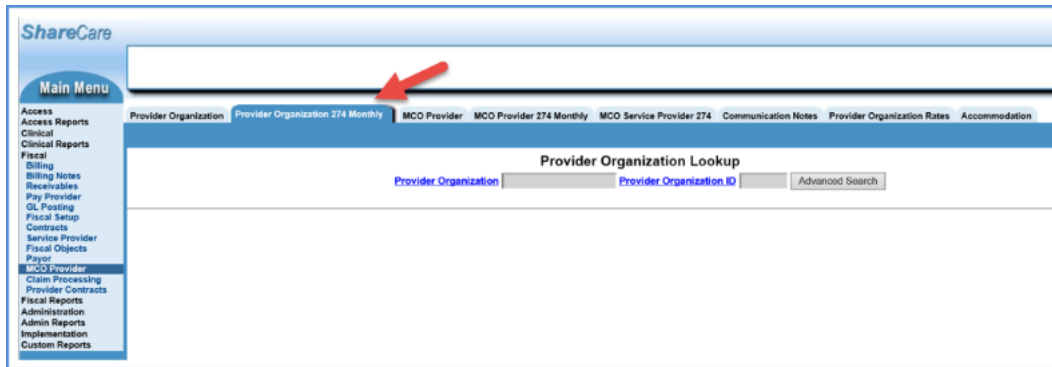
The table below lists the fields in the *Service Provider 274 Monthly* screen.

Field Label	Required	Validation	Comment
Facility Name	YES	Must be existing Facility	Must enter either Facility Name or ID to identify an existing active facility.
Facility ID	YES	Must be existing Facility	Must enter either Facility Name or ID to identify an existing active facility.
Provider Last Name	YES	Must be existing Service Provider	Must enter either Provider's Last Name or ID to identify an existing active provider.
Provider ID	YES	Must be existing Service Provider	Must enter either Provider's Last Name or ID to identify an existing active provider.
Month	YES	Between 1 to 12	
Year	YES	4-digit year	
FTE % of Children Services	YES	Between 0 and 100	
FTE % of Adult Services	YES	Between 0 and 100	
Maximum Medi-Cal Caseload Children	YES	0 to 9999	
Current Medi-Cal Caseload Children	YES	0 to 9999	
Maximum Medi-Cal Caseload Adult	YES	0 to 9999	
Current Medi-Cal Caseload Adult	YES	0 to 9999	
Telehealth Indicator	YES	Option List	
Field-Based Service	YES		
Accepting New Patient	YES		
Travel Distance	NO		If Field-Based Service is "Yes", then this field must be populated.
Cultural Training Last 12 Months	YES		See Cultural Competence note above. The default Training Event Entry Type is to display this field and the next. If this option was changed to <i>Training Event</i> , these fields are not displayed.
Total Training Hours	YES		Same as above.



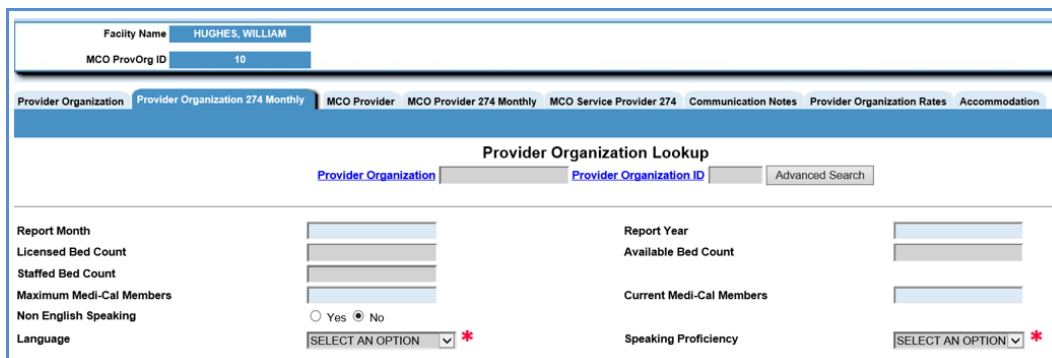
### Provider Organization 274 Monthly

The *Provider Organization 274 Monthly* screen captures monthly data specific to an MCO Organization that changes each month, for both Multi-provider and Single-provider Organizations. This new screen is located in *Fiscal > MCO Provider* immediately next to *Provider Organization*. Records created via this screen are *per MCO Organization, per month*, and the MCO Organization must already exist before a record is created.

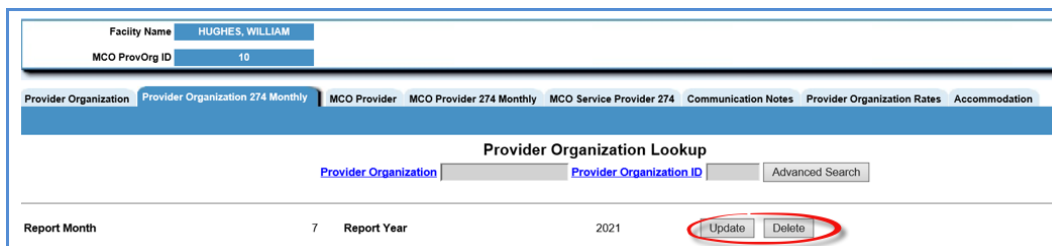


Users must have **MCO Provider Organization** “User Group” access and the appropriate access for the following operations. An error message displays if the user is not authorized to access the Provider Organization.

- **Insert** – Enter a Provider Organization Name or ID, Report year, and Month.
  - This is the unique key of record.
  - Hyperlinks are provided to lookup Provider Organization by Name or ID.
  - Select the *New* button and begin data entry; When finished select *Add* to insert the record.
  - Otherwise, select *Close* to leaving without adding a record.



- **Lookup** – Enter a Provider Organization Name or ID and then tab to see available records.
- **Update** – Enter Provider Organization Name or ID and then tab to see available records.
  - Select the *Update* button.
  - Enter changes and select *Update* (upper right) to save the changes.
  - Or select the *Close* button to exit without updating.



- **Delete** – Enter Provider Organization Name or ID and then tab to locate records for update.
  - Select the *Delete* button, at the end of the row, to archive the selected record.
  - Otherwise, select the *Close* button to exit without deleting the record.

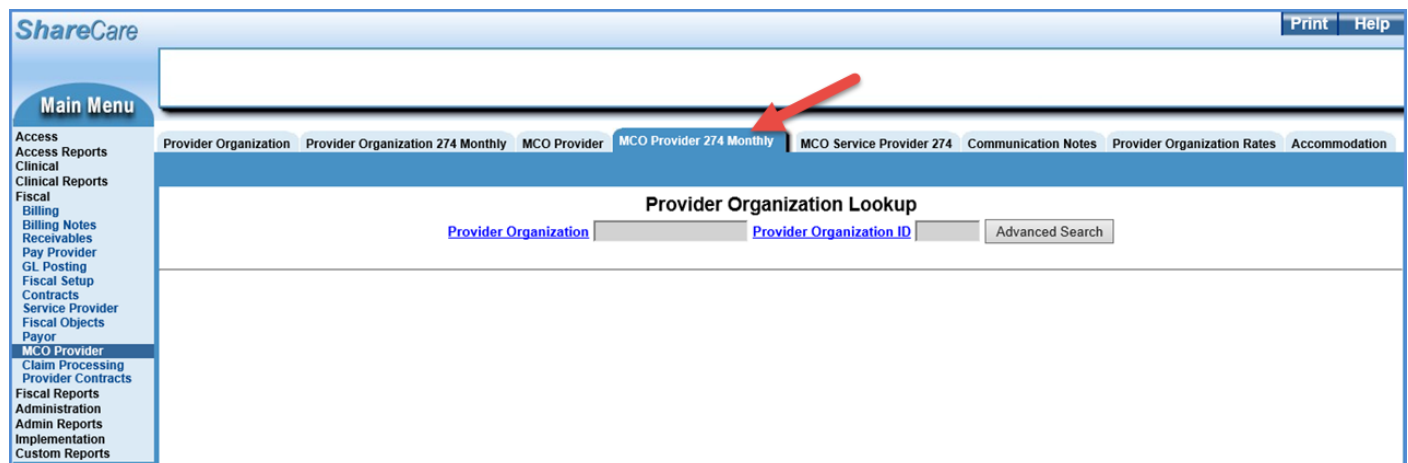


The table below lists the fields in the *Provider Organization 274 Monthly* screen.

Field Label	Required	Validation	Comment
Provider Organization	YES	Must be existing Facility	Must enter either Provider Organization Name or ID to identify an existing MCO Org.
Provider Organization ID	YES	Must be existing Facility	Must enter either Provider Organization Name or ID to identify an existing MCO Org.
Report Year	YES	Valid 4-digit year	
Month	YES	Valid month between 1 - 12	
Licensed Bed Count	NO		
Available Bed Count	NO		
Staffed Bed Count	NO		
Maximum # Medi-Cal Members	YES		Maximum number of Medi-Cal eligible Consumers
Current # Medi-Cal Members	YES		
Non-English Speaking Site	NO	Default value is "No"	User selects "Yes" if the site does not provide services in English.
<p><b>Important: If this site does not provide services in English, then at least two languages must be entered.</b></p> <p><b>1. English – (HIPAA XREF Code = "ENG") and select Speaking Proficiency with HIPAA XREF Code = "4" (Poor).</b></p> <p><b>2. One or more other languages in which a service is provided and its Speaking Proficiency must be "Excellent".</b></p>			
Language		Option List	The drop-down list values pull from the standard <i>Language</i> Option List. <i>The ShareCare administrator should review and update the HIPAA XRef column as needed.</i>
Speaking Proficiency		Option List	The drop-down list values pull from the 274 Speaking Proficiency Option List.

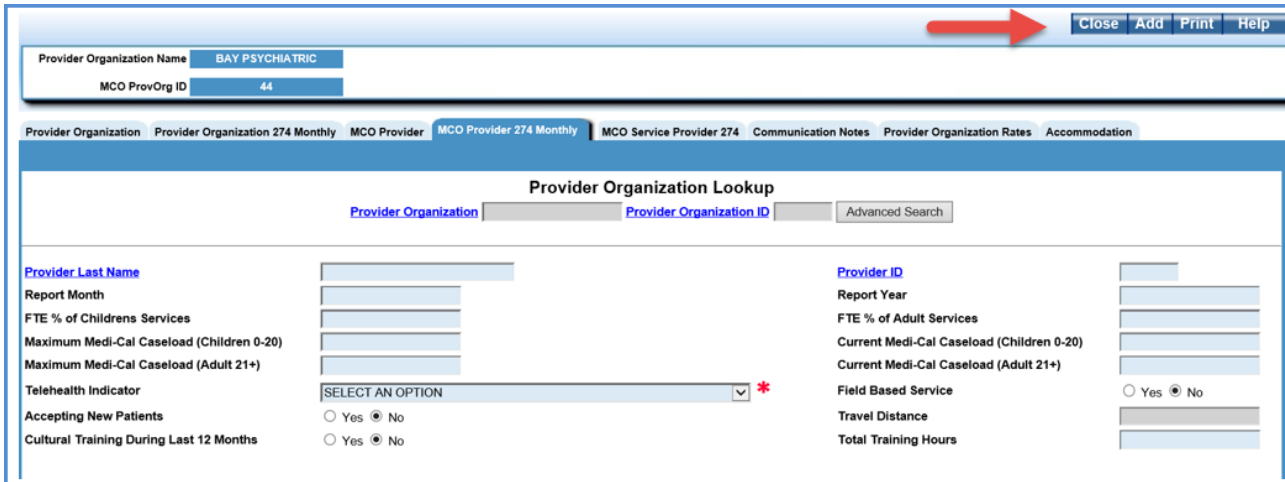
### MCO Provider 274 Monthly

The MCO Provider 274 Monthly screen captures monthly data specific to MCO Providers **for each** Provider Organization where they provide services. For example, if a MCO provider works for two Multi-Provider Organizations and are themselves a Single-Provider Organization, three records should be entered for each Organization each month. The screen is in *Fiscal > MCO Provider* between the MCO Provider and MCO Service Provider 274.




Users may not create a new record in this screen unless Provider Organization and MCO Provider have been created. For a Single-Provider Organization, either the Provider Organization or the MCO Provider must have been created. Users must also have **Provider Organization** and **MCO Provider** “User Group” access and the appropriate access for the following operations. An error message displays if the user is not authorized to access the selected Provider Organization.

- **Insert** – Enter a Provider Organization name or ID
  - Hyperlinks are provided to lookup Provider Organization by Name or ID.
  - Select the *New* button and begin data entry.
  - When complete, select the *Add* button to insert the new record.
  - Or select *Close* to exit with adding a record.



- **Lookup** – Enter Provider Organization name or ID then tab to see available records.
  - Click on a row to select a record to view.
  - A *No Current Records* message displays if there are no records for the selected Provider Organization.

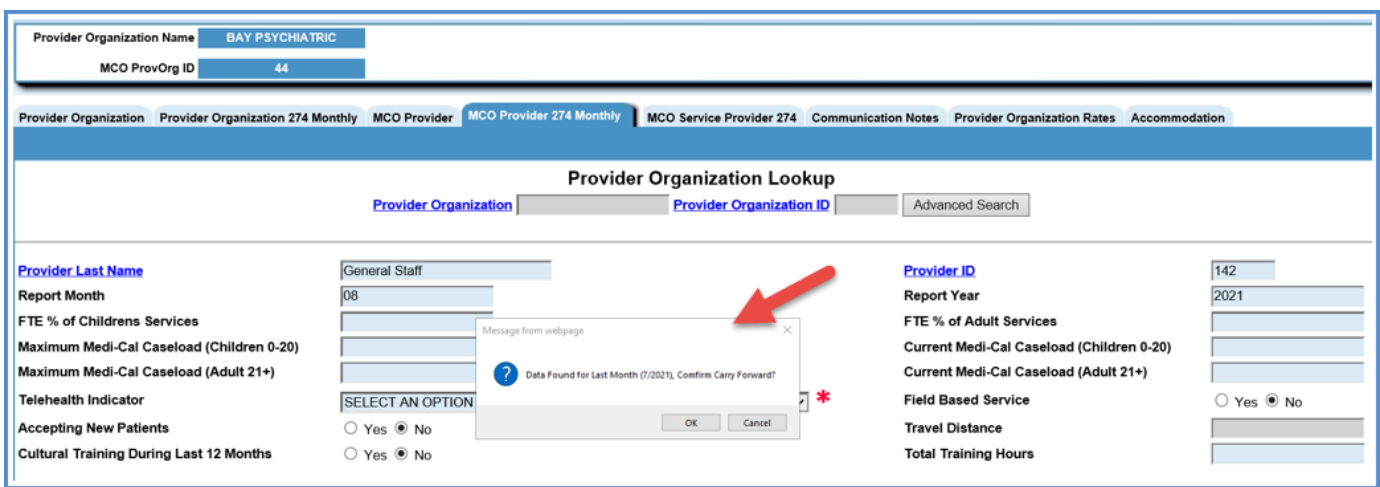


Provider ID	Provider Name	Report Month	Report Year	Update	Delete
142	General Staff,	7	2021		
142	General Staff,	8	2021		

- **Update** – Enter Provider Organization by Name or ID and then tab to see available records.
  - Select the *Update* button for the desired Provider (see image above).
  - Enter changes and click on the *Update* button (upper right) to save the changes.
  - Or select the *Close* button to exit without updating.
- **Delete** – Enter Provider Organization by Name or ID and then tab to locate records for update.
  - Select the *Delete* button to the right of the desired record (see image above).
  - Otherwise, select *Close* button to exit without deleting the record.

**Special Feature**

A “carry forward” function is available in this screen for the purpose of reducing the data entry burden. When *New* is selected (for new entry) and the Provider and Month/Year is entered, a popup box appears if a prior month record exists for this Facility/Provider. This popup box contains the message “**Data found for last month (nn/yyyy), Confirm Carry Forward?**”.



Provider Organization Name: BAY PSYCHIATRIC  
MCO ProvOrg ID: 44

Provider Organization | Provider Organization 274 Monthly | MCO Provider | MCO Provider 274 Monthly | MCO Service Provider 274 | Communication Notes | Provider Organization Rates | Accommodation

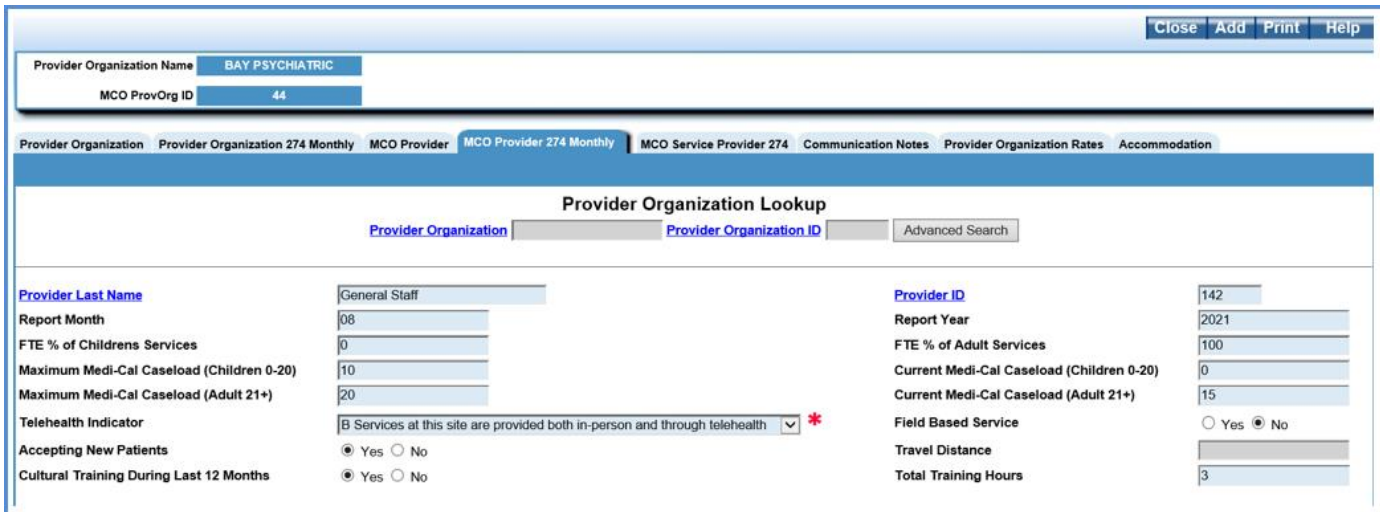
**Provider Organization Lookup**

Provider Organization: [ ] | Provider Organization ID: [ ] | Advanced Search

Provider Last Name: General Staff | Provider ID: 142  
Report Month: 08 | Report Year: 2021  
FTE % of Childrens Services: [ ] | FTE % of Adult Services: [ ]  
Maximum Medi-Cal Caseload (Children 0-20): [ ] | Current Medi-Cal Caseload (Children 0-20): [ ]  
Maximum Medi-Cal Caseload (Adult 21+): [ ] | Current Medi-Cal Caseload (Adult 21+): [ ]  
Telehealth Indicator: SELECT AN OPTION | Field Based Service:  Yes  No  
Accepting New Patients:  Yes  No | Travel Distance: [ ]  
Cultural Training During Last 12 Months:  Yes  No | Total Training Hours: [ ]

Message from webpage: Data Found for Last Month (7/2021), Confirm Carry Forward?  
OK Cancel

Answer *OK* to populate the rest of the fields with previous month’s data. Select *Cancel* to continue to a new entry screen.



Close Add Print Help

Provider Organization Name: BAY PSYCHIATRIC  
MCO ProvOrg ID: 44

Provider Organization | Provider Organization 274 Monthly | MCO Provider | MCO Provider 274 Monthly | MCO Service Provider 274 | Communication Notes | Provider Organization Rates | Accommodation

**Provider Organization Lookup**

Provider Organization: [ ] | Provider Organization ID: [ ] | Advanced Search

Provider Last Name: General Staff | Provider ID: 142  
Report Month: 08 | Report Year: 2021  
FTE % of Childrens Services: 0 | FTE % of Adult Services: 100  
Maximum Medi-Cal Caseload (Children 0-20): 10 | Current Medi-Cal Caseload (Children 0-20): 0  
Maximum Medi-Cal Caseload (Adult 21+): 20 | Current Medi-Cal Caseload (Adult 21+): 15  
Telehealth Indicator: B Services at this site are provided both in-person and through telehealth | Field Based Service:  Yes  No  
Accepting New Patients:  Yes  No | Travel Distance: [ ]  
Cultural Training During Last 12 Months:  Yes  No | Total Training Hours: 3

Users then have the option to update the data that was carried forward before selecting the *Add* to insert the new record.

The table below lists the fields in the *MCO Provider 274 Monthly* screen.

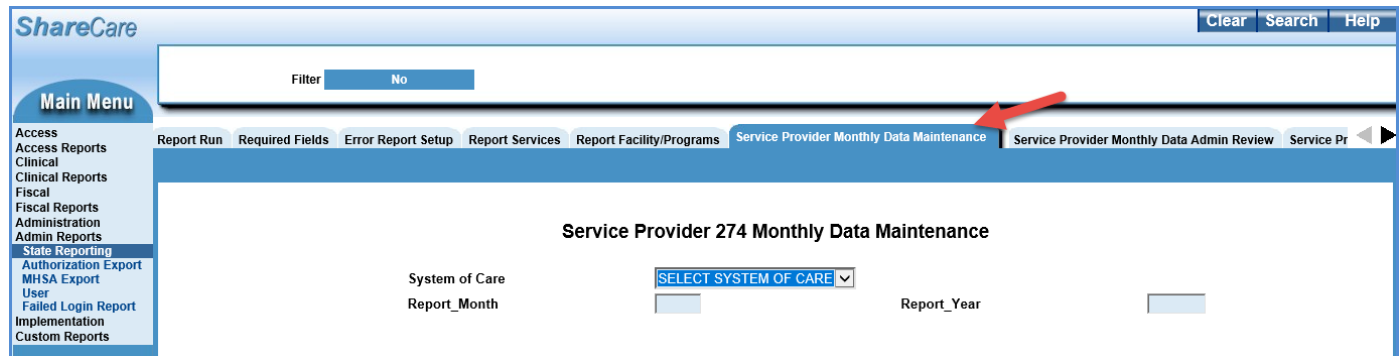
Field Label	Required	Validation	Comment
Provider Organization	YES	Must be existing MCO Provider Org	Must enter either Provider Organization Name or ID to identify an existing MCO Provider Organization.
Provider Organization ID	YES	Must be existing MCO Provider Org	Must enter either Provider Organization Name or ID to identify an existing MCO Provider Organization.
Provider Last Name	YES	Must be existing MCO Provider	Must enter either MCO Provider Last Name or ID to identify an existing MCO provider
MCO Provider ID	YES	Must be existing MCO Provider	Must enter either MCO Provider Last Name or ID to identify an existing MCO provider
FTE % of Children Services	YES	Between 0 and 100	
FTE % of Adult Services	YES	Between 0 and 100	
Maximum Medi-Cal Caseload Children	YES	0 to 9999	

Current Medi-Cal Caseload Children	YES	0 to 9999	
Maximum Medi-Cal Caseload Adult	YES	0 to 9999	
Current Medi-Cal Caseload Adult	YES	0 to 9999	
Telehealth Indicator	YES	Option List	The drop-down list values are pulled from the 274 <i>Telehealth Indicator</i> Option List.
Field-Based Service	YES		
Accepting New Patient	YES		
Travel Distance	NO		
Cultural Training Last 12 Months	YES	Since MCO Provider does not have a "Training Event" screen, the global option of using Training Event is not applicable here. Cultural Competence information is entered directly in this screen.	

### Service Provider Monthly Data Maintenance

The Service Provider Monthly Data Maintenance screen is one of three new screens that allows users to monitor and manage the readiness of monthly submissions. Users need the appropriate Organization, Facility, and Provider User Group access, and the appropriate screen access for the following actions.

In *Admin Report > State Reporting*, select the *Service Provider Monthly Data Maintenance* tab. The initial screen displays the following.



ShareCare Clear Search Help

Filter: No

Main Menu

Access Reports  
Clinical Reports  
Fiscal Reports  
Administration  
Admin Reports  
State Reporting  
Authorization Export  
MHSA Export  
User  
Failed Login Report  
Implementation  
Custom Reports

Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data Maintenance** Service Provider Monthly Data Admin Review Service Pr

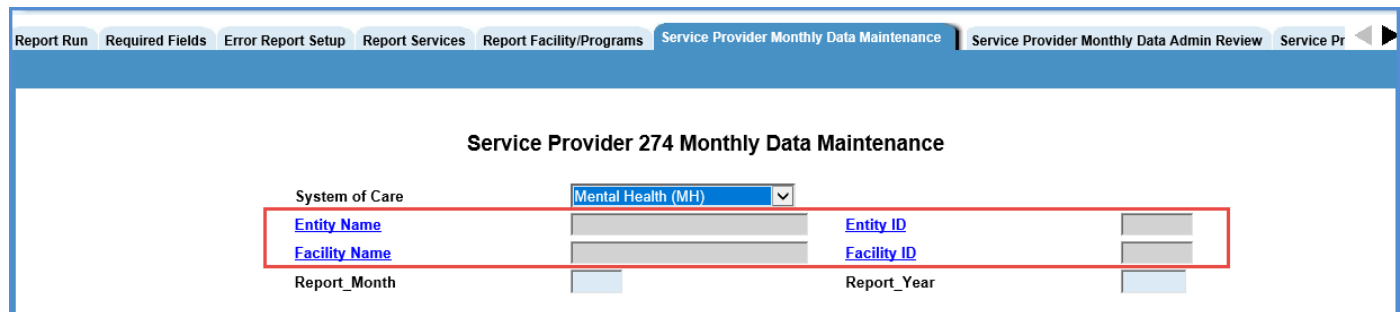
### Service Provider 274 Monthly Data Maintenance

System of Care:

Report\_Month:

Report\_Year:

If *Mental Health* or *Alcohol and Drug* are selected in the System of Care drop-down, additional fields are displayed and may be used to narrow the scope of the search.



Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data Maintenance** Service Provider Monthly Data Admin Review Service Pr

### Service Provider 274 Monthly Data Maintenance

System of Care:

Entity Name:

Entity ID:

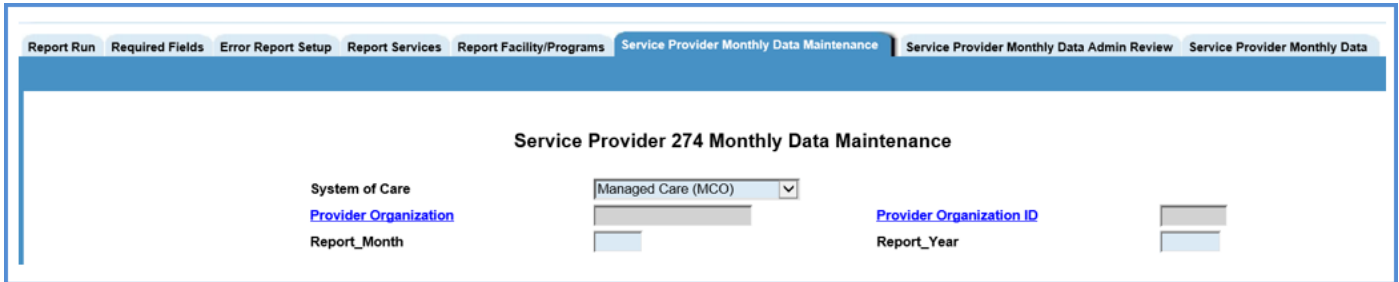
Facility Name:

Facility ID:

Report\_Month:

Report\_Year:

If *Managed Care* is selected in the System of Care drop-down, additional fields for *Provider Organization* and *Provider Organization ID* are displayed and may be used to narrow the scope of the search.

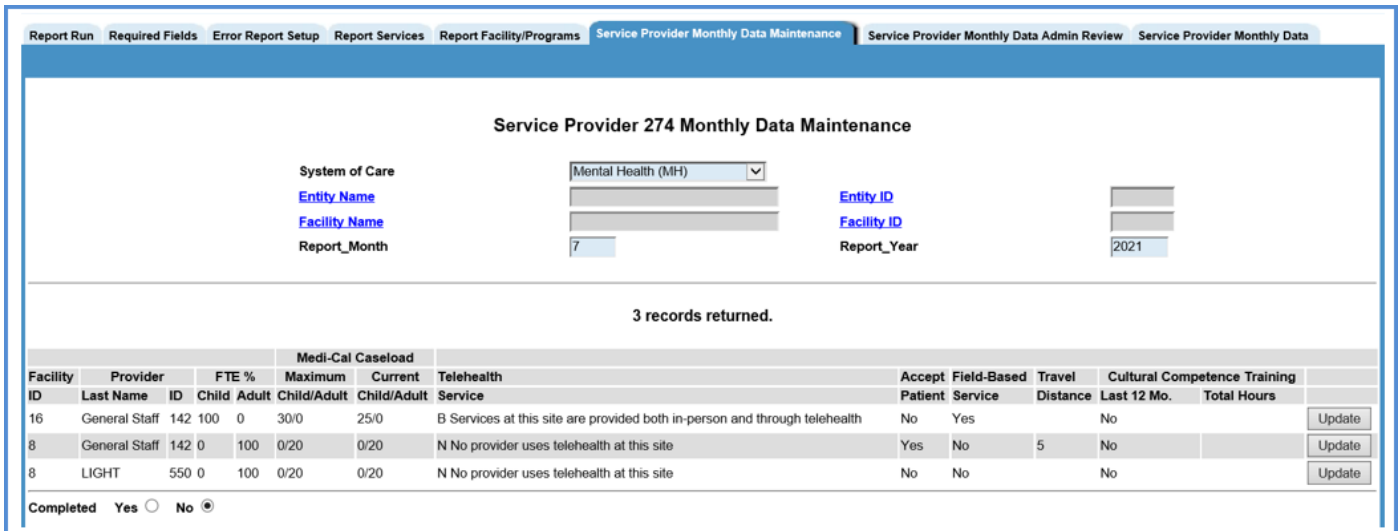


Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data Maintenance** Service Provider Monthly Data Admin Review Service Provider Monthly Data

### Service Provider 274 Monthly Data Maintenance

System of Care: Managed Care (MCO) [v]  
 Provider Organization: [text field]  
 Report\_Month: [text field]      Provider Organization ID: [text field]  
 Report\_Year: [text field]

Click on the *Search* button in the upper right-hand corner to display the search results. The resulting list is sorted by Entity, Facility, and then Provider. Please note that users can only see the *Facilities* or *MCO Organizations* that he or she is authorized to access.



Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data Maintenance** Service Provider Monthly Data Admin Review Service Provider Monthly Data

### Service Provider 274 Monthly Data Maintenance

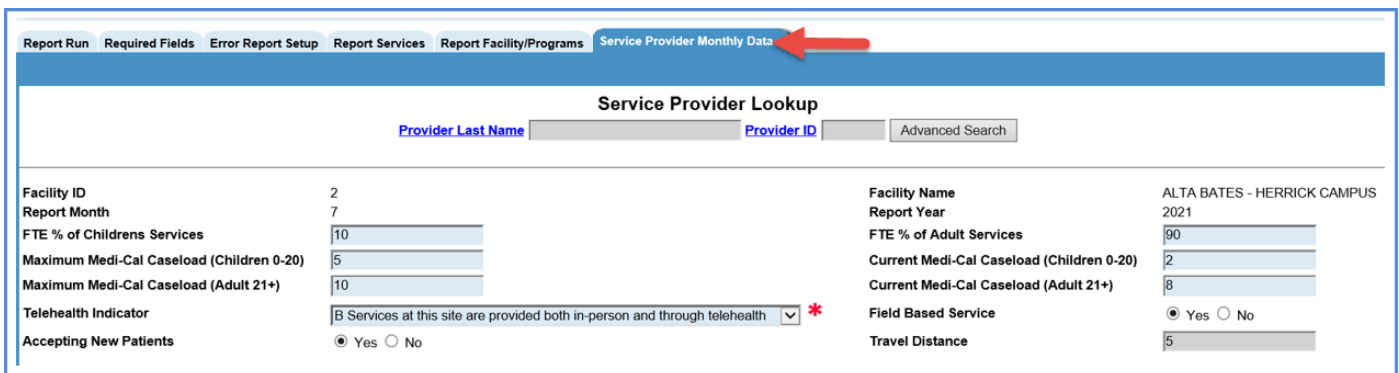
System of Care: Mental Health (MH) [v]  
 Entity Name: [text field]      Entity ID: [text field]  
 Facility Name: [text field]      Facility ID: [text field]  
 Report\_Month: 7 [text field]      Report\_Year: 2021 [text field]

3 records returned.

Facility ID	Provider Last Name	FTE %	Medi-Cal Caseload		Current	Telehealth Service	Accept Patient	Field-Based Service	Travel Distance	Cultural Competence Training Last 12 Mo.	Training Total Hours	Update	
			Child	Adult									
16	General Staff	142	100	0	30/0	25/0	B Services at this site are provided both in-person and through telehealth	No	Yes		No		Update
8	General Staff	142	0	100	0/20	0/20	N No provider uses telehealth at this site	Yes	No	5	No		Update
8	LIGHT	550	0	100	0/20	0/20	N No provider uses telehealth at this site	No	No		No		Update

Completed Yes  No

Select the *Update* button on the far right of a row to make corrections to missing or incorrect data for that individual record. Selecting *Update* opens the corresponding *Service Provider 274 Monthly* screen for MH/ADP records or the corresponding *MCO Provider 274 Monthly* screen for MC records.



Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data** ←

### Service Provider Lookup

Provider Last Name: [text field]      Provider ID: [text field]      Advanced Search

Facility ID	2	Facility Name	ALTA BATES - HERRICK CAMPUS
Report Month	7	Report Year	2021
FTE % of Childrens Services	10	FTE % of Adult Services	90
Maximum Medi-Cal Caseload (Children 0-20)	5	Current Medi-Cal Caseload (Children 0-20)	2
Maximum Medi-Cal Caseload (Adult 21+)	10	Current Medi-Cal Caseload (Adult 21+)	8
Telehealth Indicator	B Services at this site are provided both in-person and through telehealth [v] *	Field Based Service	<input checked="" type="radio"/> Yes <input type="radio"/> No
Accepting New Patients	<input checked="" type="radio"/> Yes <input type="radio"/> No	Travel Distance	5

When the update is complete or the user decides to *Close* without updating, *control returns to the Service Provider Monthly Data Maintenance* screen.

Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data Maintenance** Service Provider Monthly Data Admin Review Service Provider Monthly Data

### Service Provider 274 Monthly Data Maintenance

System of Care: Mental Health (MH)

Entity Name: \_\_\_\_\_ Entity ID: \_\_\_\_\_  
 Facility Name: \_\_\_\_\_ Facility ID: \_\_\_\_\_  
 Report\_Month: \_\_\_\_\_ Report\_Year: 2021

Message from webpage: I acknowledge that all is complete and valid. [OK] [Cancel]

Facility ID	Provider Last Name	Provider ID	FTE %		Medi-Cal Caseload		Telehealth Service	Accept Patient	Field-Based Service	Travel Distance	Cultural Competence Last 12 Mo.	Training Total Hours	Update
			Child	Adult	Child/Adult	Child/Adult							
16	General Staff	142	100	0	30/0	25/0	B Services at this site are provided both in-person and through telehealth	No	Yes		No		
8	General Staff	142	0	100	0/20	0/20	N No provider uses telehealth at this site	Yes	No	5	No		
8	LIGHT	550	0	100	0/20	0/20	N No provider uses telehealth at this site	No	No		No		

At the bottom of the list there is a *Completed* field with Yes/No radio buttons.

Facility ID	Provider Last Name	Provider ID	FTE %		Medi-Cal Caseload		Completed
			Child	Adult	Child/Adult	Child/Adult	
16	General Staff	142	100	0	30/0	25/0	Yes <input type="radio"/> No <input checked="" type="radio"/>
8	General Staff	142	0	100	0/20	0/20	Yes <input type="radio"/> No <input type="radio"/>
8	LIGHT	550	0	100	0/20	0/20	Yes <input type="radio"/> No <input type="radio"/>

If the Yes is selected, a pop-up box displays the message "I acknowledge that all is complete and valid." Selecting OK sets a "complete" flag to true for the records. The Complete flag for each record is visible on the *Service Provider Monthly Data* tab.

**At this time, the flag for records marked complete cannot be reversed to No.**

### Service Provider Monthly Data Admin Review

The *Service Provider Monthly Data Admin Review* screen functions identically to the previous screen but has an added *Copy* function. The same User Group and screen access requirements apply. When the search results are displayed after entering the *System of Care*, *Report\_Month*, and *Report\_Year*, a *Copy to Next Month* button is displayed at the top of the results list.

Report Run Required Fields Error Report Setup Report Services Report Facility/Programs **Service Provider Monthly Data Maintenance** **Service Provider Monthly Data Admin Review** Service Provider Monthly Data

### Service Provider 274 Monthly Data Admin Review

System of Care: Mental Health (MH)

Entity Name: \_\_\_\_\_ Entity ID: \_\_\_\_\_  
 Facility Name: \_\_\_\_\_ Facility ID: \_\_\_\_\_  
 Report\_Month: 07 Report\_Year: 2021

3 records returned.

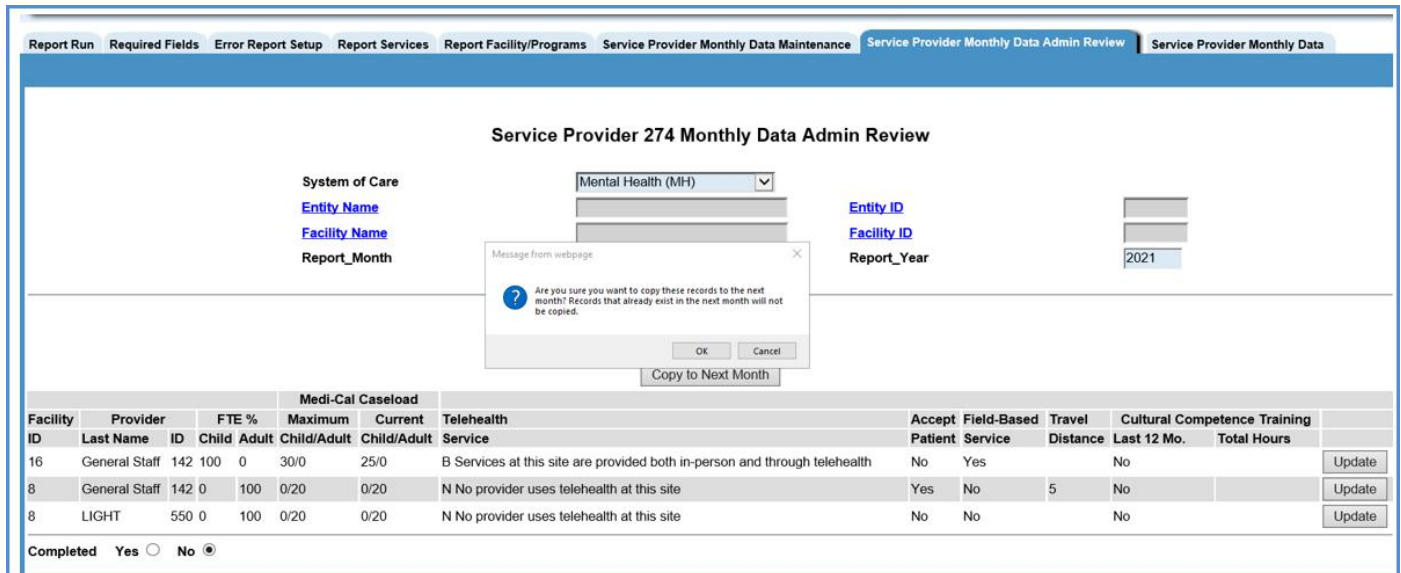
Copy to Next Month

Facility ID	Provider Last Name	Provider ID	FTE %		Medi-Cal Caseload		Telehealth Service	Accept Patient	Field-Based Service	Travel Distance	Cultural Competence Last 12 Mo.	Training Total Hours	Update
			Child	Adult	Child/Adult	Child/Adult							
16	General Staff	142	100	0	30/0	25/0	B Services at this site are provided both in-person and through telehealth	No	Yes		No		
8	General Staff	142	0	100	0/20	0/20	N No provider uses telehealth at this site	Yes	No	5	No		
8	LIGHT	550	0	100	0/20	0/20	N No provider uses telehealth at this site	No	No		No		

Completed Yes  No

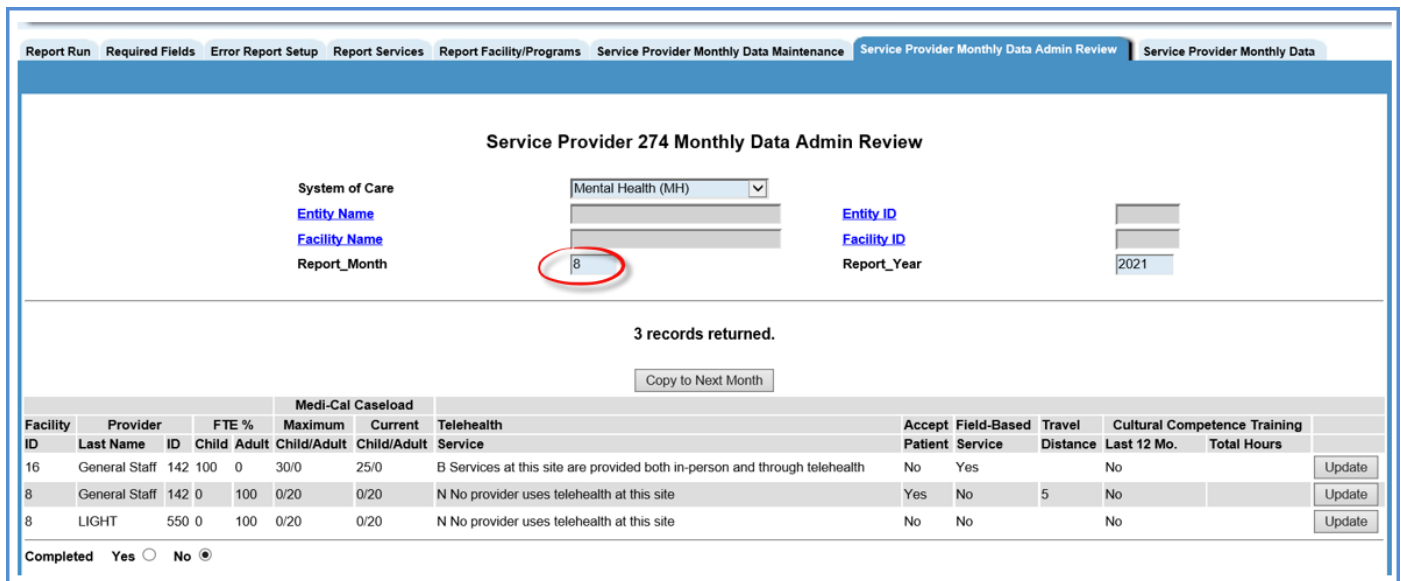


Selecting the *Copy to Next Month* button results in a confirmation pop-up box with the following message “Are you sure you want to copy these records to the next month? Records that already exist in the next month will be copied.”



The screenshot shows the 'Service Provider 274 Monthly Data Admin Review' interface. A confirmation dialog box is displayed in the center, asking: "Are you sure you want to copy these records to the next month? Records that already exist in the next month will not be copied." The dialog has 'OK' and 'Cancel' buttons. Below the dialog, a table of data is visible with columns for Facility ID, Provider, FTE %, Medi-Cal Caseload, Telehealth, and Training. A 'Copy to Next Month' button is located at the bottom of the table area.

Select *OK* to copy all records in the results list to the following month.



The screenshot shows the same 'Service Provider 274 Monthly Data Admin Review' interface after the copy action. The 'Report\_Month' field is now set to '8' and is circled in red. Below the form, it says "3 records returned." and a 'Copy to Next Month' button is present. The data table below shows the same three records as in the previous screenshot.

These new records display on the screen after the copy action is completed. The *Report\_Month* is now 8 in the example above.

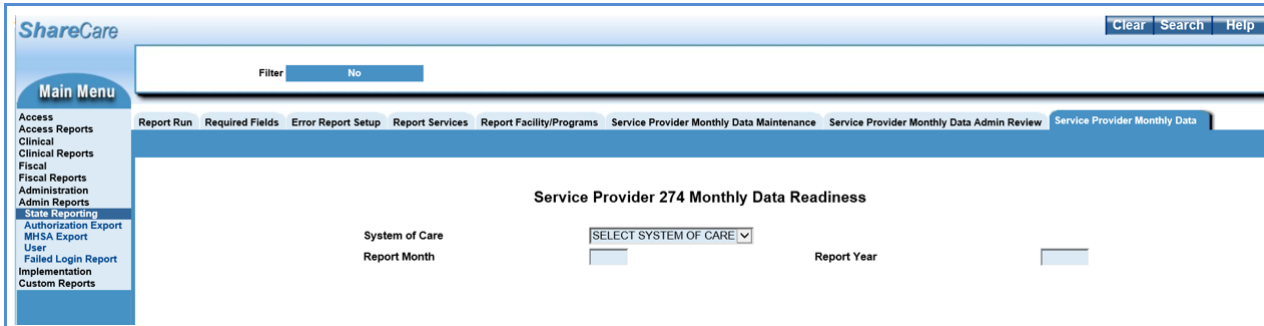
**Important Considerations**

- The *Copy to Next Month* action does not need to be performed at the System of Care level. If *Entity* and even *Facility* are entered, then only a subset (the results in the list after selecting *Search*) are copied.
- A Service Provider’s data may change monthly, and some may stop working. It is the agency’s responsibility to review the accuracy of copied data. If a Provider has stopped working for a facility, users should delete his or her autogenerated monthly record.
- It is possible that individual monthly records are entered into the system for the next month before a user visits this screen. For this reason, the *Copy to Next Month* considers *System of Care*, *Entity*, *Facility*, *Service Provider ID*, *Month*, and *Year*, and does not create a duplicate if a record already exists.



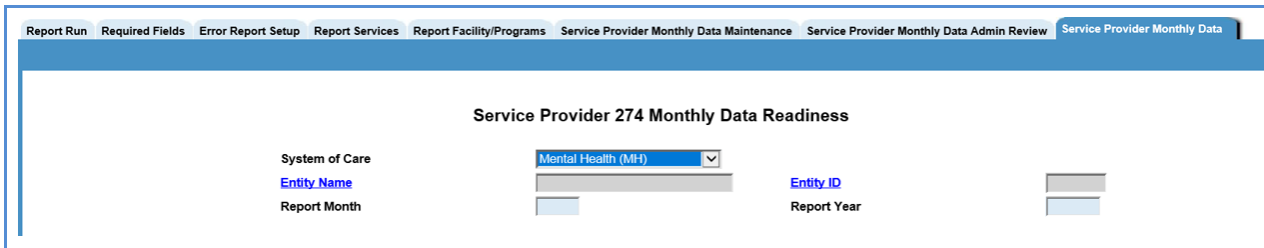
### Service Provider Monthly Data

The *Service Provider Monthly Data* screen was created to monitor the readiness of a Service Provider’s 274 monthly data at the Site (Facility or MCO Organization) level.



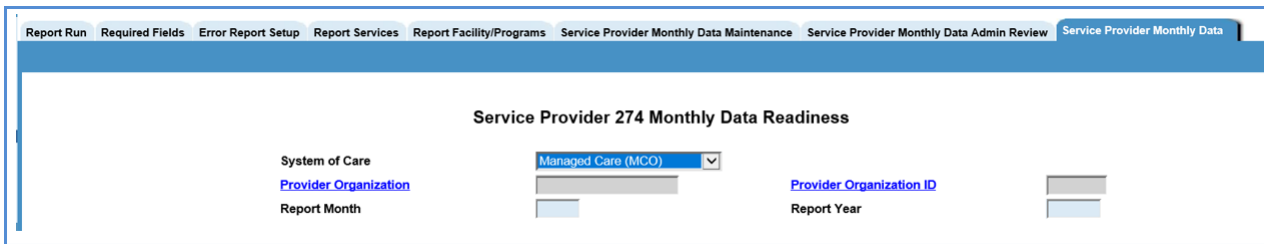
The screenshot shows the 'Service Provider 274 Monthly Data Readiness' form. The 'System of Care' dropdown is currently set to 'SELECT SYSTEM OF CARE'. Other fields include 'Report Month' and 'Report Year'.

Users first select a System of Care. Additional optional fields for *Entity Name* and *Entity ID* are displayed if *Mental Health* or *Alcohol and Drug* are selected for the System of Care.



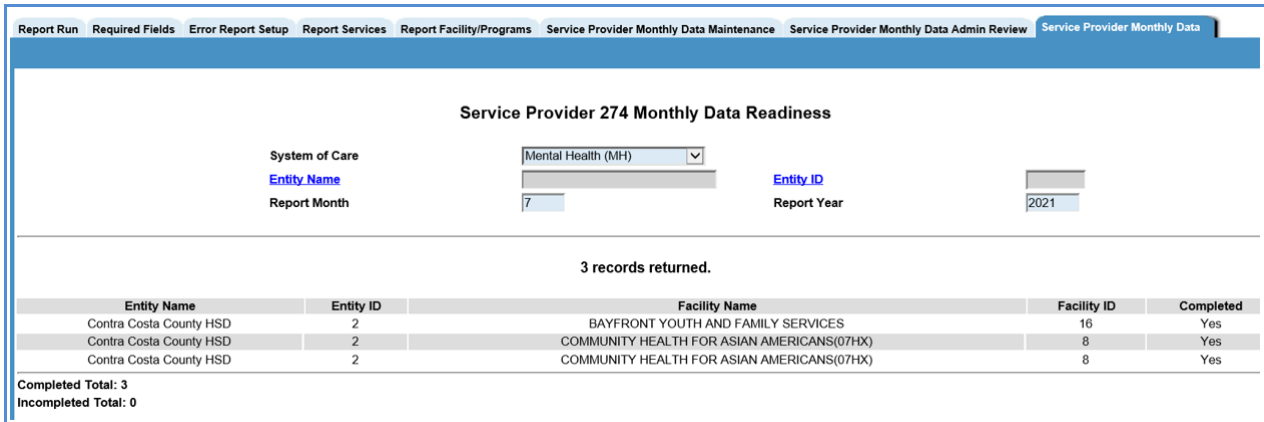
The screenshot shows the 'Service Provider 274 Monthly Data Readiness' form with 'System of Care' set to 'Mental Health (MH)'. The 'Entity Name' and 'Entity ID' fields are now visible and active.

If *Managed Care* is selected for the System of Care, additional optional fields for *Provider Organization* and *Provider Organization ID* are displayed.



The screenshot shows the 'Service Provider 274 Monthly Data Readiness' form with 'System of Care' set to 'Managed Care (MCO)'. The 'Provider Organization' and 'Provider Organization ID' fields are now visible and active.

Once entry is complete, click on *Search*. The results are displayed, sorted by *Provider Groups* (Entity or MCO Organization) and Sites (Facility or MCO Organization).



The screenshot shows the search results for 3 records. The 'System of Care' is 'Mental Health (MH)', 'Report Month' is '7', and 'Report Year' is '2021'. Below the form, a table displays the results.

Entity Name	Entity ID	Facility Name	Facility ID	Completed
Contra Costa County HSD	2	BAYFRONT YOUTH AND FAMILY SERVICES	16	Yes
Contra Costa County HSD	2	COMMUNITY HEALTH FOR ASIAN AMERICANS(07HX)	8	Yes
Contra Costa County HSD	2	COMMUNITY HEALTH FOR ASIAN AMERICANS(07HX)	8	Yes

Completed Total: 3  
 Incompleted Total: 0

The totals on the bottom left provide a count of the total Facilities or Provider Organizations that have all Monthly records audited and marked as Completed (or incomplete) in the *Service Provider Monthly Data Admin Review* screen.

## BUG FIXES

**ShareCare Error When Printing, SC-1449 (SJ, 3254)**

In *Fiscal > Billing > Billing Run*, selecting a Billing Run ID and clicking on “Print” resulted in a ShareCare error. Now, printing a Billing Run ID works as expected.

**Restored Global Functionality to Set Consumer ID from Pre\_Consumer ID, SC-1405 (CC, 3195)**

As a follow-up of SOW-24: Screening Enhancement for CSI Assessment for ContraCosta (see release notes for ShareCare 9.0.0) and New Global Variables to Control Adding Screening and Call Logging, SC-1382 (CC, 2990: see release notes for ShareCare 9.0.2), the Global functionality to set the Consumer ID from the Pre\_Consumer ID was restored. Both Global Variables are still set to ‘1’ for Contra Costa and are set to ‘0’ for all other counties in *Administration > Security > Global Variables > Screening/Call Logging*. To create a consumer with the same pre\_consumer id:

- Select Edit/View.
- Then choose a System of Care value and select the Update button.
- The following Consumer Request message displays.

**Consumer Request**

You have not selected an existing consumer for this screening.  
Do you want to create a new consumer with this screening information?

Yes
No

- Select “Yes” to update the Screening record and have the pre\_consumer become a consumer with the SAME ID as the pre\_consumer.
- Selecting “No” updates the Screening record without changing the pre\_consumer.

**Medi-Cal Eligibility DOB and Gender Fields, SC-1396 (CC, 3140)**

An issue was addressed where the *Date of Birth* and *Gender* information on Medi-Cal claims did not always match the data coming from MMEF. An update was made to ensure the MMEF *Date of Birth* and *Gender* data is always loaded into the Consumer\_Payor file, ensuring the claim information provided to Medi-Cal is correct.