

# myAvatar ProviderConnect Enterprise Managing Organization Setup

County of Santa Clara Implementation

April 12, 2022



**Netsmart**

---

[www.ntst.com](http://www.ntst.com)

4950 College Boulevard  
Overland Park, KS 66211  
800.842.1973

# Table of Contents

---

Overview .....	1
Update Requirements.....	1
New tables added: .....	1
OAuth and Certification Tool Access .....	2
Register your Application .....	2
Registry Settings .....	4
ProviderConnect Enterprise Registry Settings .....	4
Cal-OMS Registry Settings .....	4
CSI Registry Settings.....	4
Managing Organization Definition.....	5
Adding a new Managing Organization.....	6
Managing Organization Dictionary Mapping.....	11
Managing Organization Dictionary Mapping.....	11
Assumptions .....	11
Table.....	<b>Error! Bookmark not defined.</b>
Practitioner Enrollment .....	13



# Overview

---

ProviderConnect Enterprise is a data exchange platform built on Fast Healthcare Interoperability Resources (FHIR) APIs in order to securely exchange electronic health information and supports interoperability between a managing organization and its network of contract providers.

Contract providers who operate their own Electronic Health Records could use ProviderConnect Enterprise to integrate and community with their managing organization's myAvatar CareRecord in order to view, create, update and exchange records related to client or network management, claim management and state reporting requirements. This integration between two records will reduce or eliminate the need for duplicate data entry or the maintenance of batch data share files. The integration also provides an opportunity for two entities to communicate in real time and streamline care coordination for the individuals receiving care in their network.

This document is intended to provide an overview of new functionality added within myAvatar as it relates to integration with ProviderConnect Enterprise. The full overview and scope of data shared through ProviderConnect Enterprise can be found in the Companion Guide.

## Update Requirements

---

The myAvatar ProviderConnect Enterprise Integration requires the following released updates:

- CareFabric 2022 Updates:
  - 3
  - 13
  - 18
  - 21
- Cal-PM 2022 Updates:
  - 10
  - 16
- All Cal-PM and CareFabric Updates up to 2022.

### **New tables added:**

pce\_client\_mapping

pce\_dictionary\_mapping

pce\_episode\_mapping

pce\_organization\_definition

pce\_record\_mapping



pce\_staff\_mapping

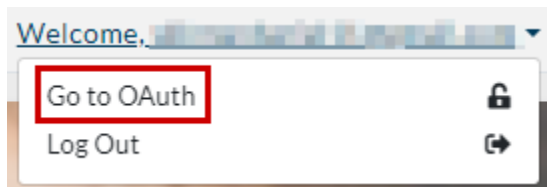
# OAuth and Certification Tool Access

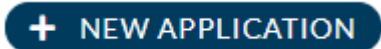
---

## Register your Application

OAuth is the security platform used to grant read/write access as needed to Provider agencies within the ProviderConnect Enterprise Network. To receive your agency's unique OAuth Credentials, follow these steps. These steps are primarily completed by your Netsmart consultant.

1. For UAT/Certification, navigate to <https://fhirtest.netsmartcloud.com/home>
  - a. Post-certification to receive PROD credentials, you will use <https://oauth.netsmartcloud.com/>
2. Select  in the upper-right hand corner.
3. Select  in the bottom right.
4. Enter an email, password, and Company. Your Company is best represented as the name of your Provider agency.
5. Once created and logged in, you'll see two new tabs, *Getting Started* and *Certification*.
  - a. The *Getting Started* tab will show the Companion and Dictionary Guides.
  - b. The *Certification* tab will be used for Provider Certification after your Vendor's certification has been completed.
6. Click on the "Welcome" at the top right of the page and "Go to OAuth."



- a. Log in with the same credentials you just created.
7. If you do not already have an application, create one with 
    - a. In TEST your application name should be reflective of your organization and the environment it's being used in. For example, "Momentum UAT".
    - b. In PRODUCTION, your application name should ONLY be the full name of your organization, since the name will be displayed in the consent portal. For example "Catholic Charities of Santa Clara County."
  8. With your application selected, click "General" to view your unique Client ID and Secret. **To maintain data security, it is imperative that these credentials are not shared with anyone who does not need them.**

**Credentials**

Client ID:

725231c5533206aef7e88bb4d8f92f96

**COPY**

Client Secret:

**SHOW**

**COPY**

9. Contact your ProviderConnect Enterprise Netsmart representative who will apply the appropriate access to your newly created account.

# Registry Settings

---

## ProviderConnect Enterprise Registry Settings

- **Avatar CareFabric->ProviderConnect Enterprise->C2**
  - Must be set to 'Y'
  - Will add the ProviderConnect Enterprise Identifiers section to the Admission form and allow connection to and sending data to the County of Santa Clara.

## Cal-OMS Registry Settings

Only needed if Cal-OMS reporting is required by your agency.

- **Avatar PM->California Required EDI->CAL OMS Reporting->->->Enable Non LA County Requirements**
  - Must be set to 'Y'
- **Avatar PM->California Required EDI->CAL OMS Reporting->->->Enable LA County Reporting Requirements**
  - Must be set to 'N'

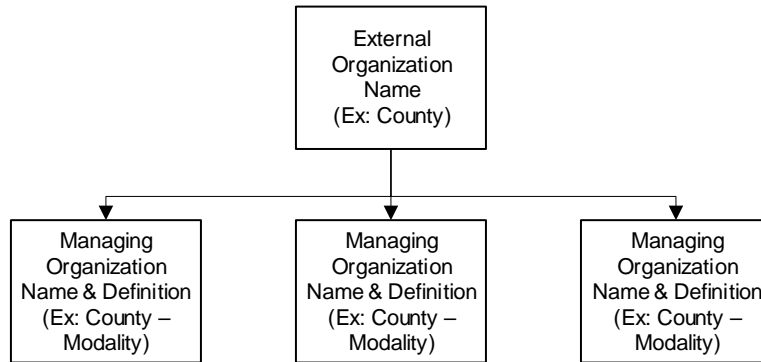
## CSI Registry Settings

Only needed if CSI reporting is required by your agency.

- **Avatar PM->California Required EDI->CSI->->->Enable MHSA/DIG Data Collection Fields**
  - Must be set to 'Y'

# Managing Organization Definition

---





# Adding a new Managing Organization

- 1.) Search for the “**Managing Organization Definition**” form.

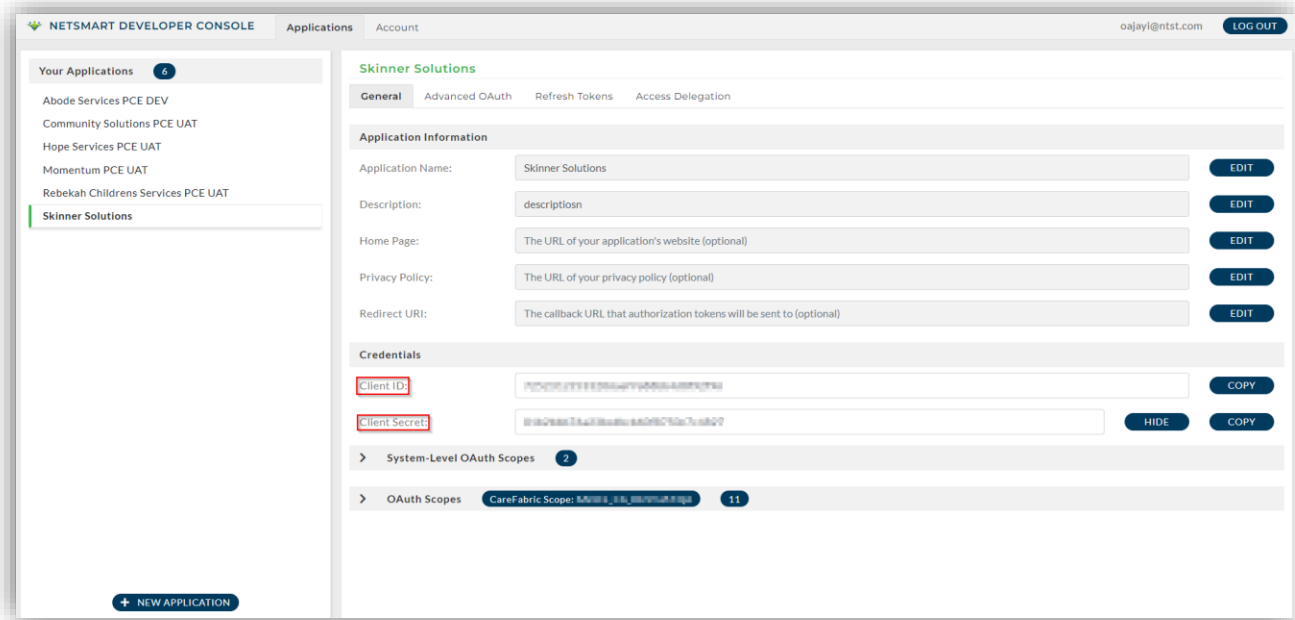
The screenshot shows the 'Managing Organization Definition' form. The 'Managing Organization' dropdown is set to 'Internal PCE QA MH'. The 'System Type' is set to 'Test'. The 'Managing Organization Name' is 'Internal PCE QA MH'. The 'Production External System ID' is empty. The 'Production External Program ID' is empty. The 'Production External Scope' is empty. The 'Production Authorization Client ID' is empty. The 'Production Authorization Secret' is empty. The 'Test External System ID' is 'NTST\_CCP\_QA'. The 'Test External Program ID' is '303'. The 'Test External Scope' is 'PCEISBOX:QA'. The 'Test Authorization Client ID' is '263a94d77d11635a881806f37047538b'. The 'Test Authorization Secret' is '\*\*\*\*\*'. The 'Associated Admission Programs' list includes 'O.P. Adult S.A.', 'O.P. Child Psych.', 'O.P. Child S.A.', and 'O.P. Mature Adult Psych.'. The 'Associated Guarantor/Payor' list includes 'Aetna Life and Casualty', 'Blue Cross / Blue Shield of Colorado', 'Champus / Va', and 'CSM Default Payor'.

- 2.) Select the “Add” radio button from the “**Add New Or Edit Existing**” field.
- 3.) Enter the Managing Organization Name (must be indicative of Santa Clara and the admission program being defined).
- 4.) Enter the **External System ID**
  - a. Follow the naming convention: “*orgName\_CCP\_UAT*” or “*orgName\_CCP\_PROD*” depending on the type depicted in the “**System Type**” field at the top of the page.
  - b. For the remainder of the fields, also correspond Production or Test dependent on the “**System Type**” field. DO NOT enter both Production and Test information.

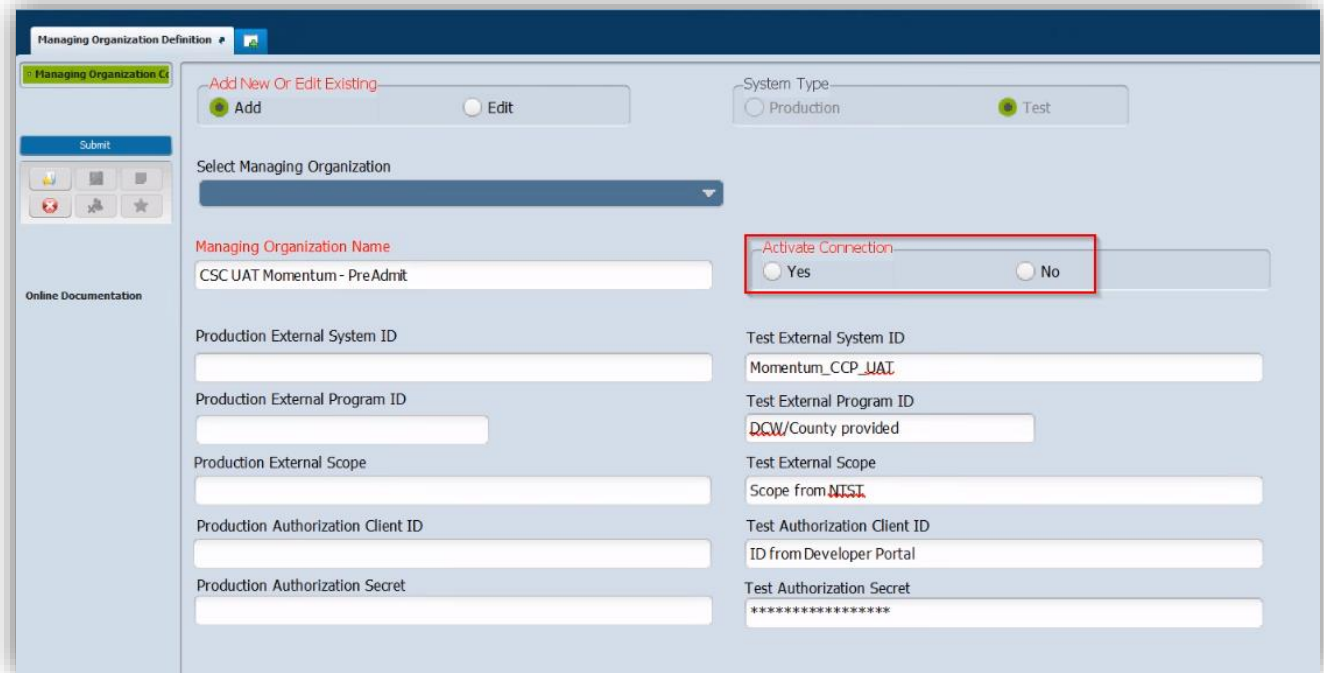
The screenshot shows the 'Managing Organization Definition' form in the myAvatar 2021 application. The form is divided into several sections:

- System Type:** A radio button group with 'Production' and 'Test' options. The 'Test' option is selected and highlighted with a red box.
- Managing Organization Name:** A text input field containing 'CSC UAT Momentum - PreAdmit'.
- Activate Connection:** A radio button group with 'Yes' and 'No' options.
- External System IDs:** Two columns of text input fields for 'Production External System ID' and 'Test External System ID'. The 'Test' field contains 'Momentum\_CCP\_UAT'.
- External Program IDs:** Two columns of text input fields for 'Production External Program ID' and 'Test External Program ID'.
- External Scopes:** Two columns of text input fields for 'Production External Scope' and 'Test External Scope'.
- Authorization Client IDs:** Two columns of text input fields for 'Production Authorization Client ID' and 'Test Authorization Client ID'.
- Authorization Secrets:** Two columns of text input fields for 'Production Authorization Secret' and 'Test Authorization Secret'.

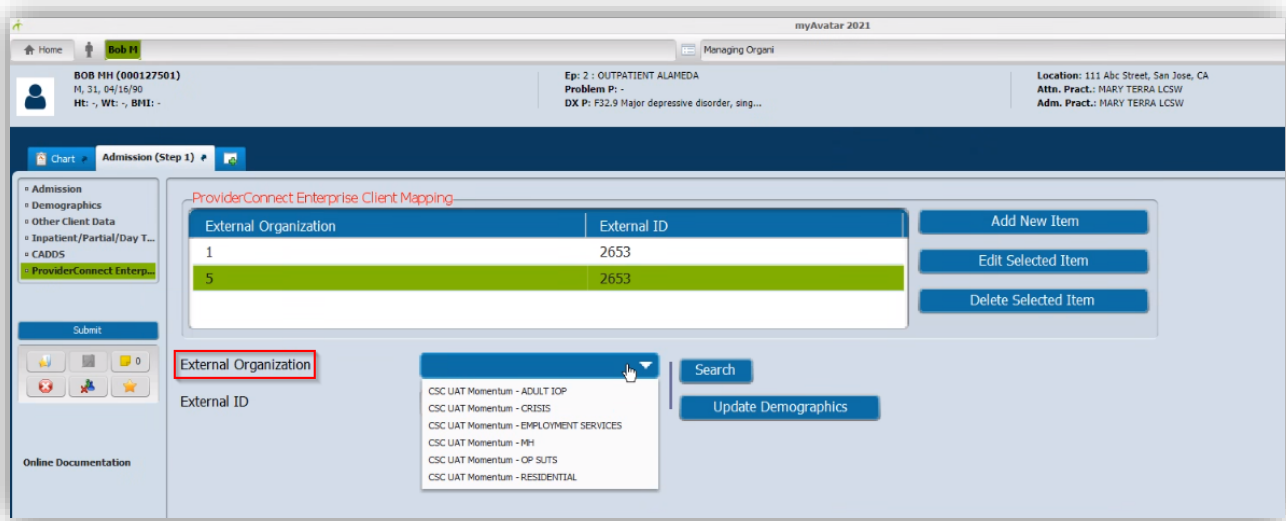
- 5.) Enter the Program ID for this Managing Organization within the “**External Program ID**” field.
  - a. This can be found within your Data Collection Workbook.
- 6.) For the “**External Scope**” field, please reach out to your Netsmart resource and let them know you are defining a new Managing Organization. They will then provide you with the appropriate scope.
- 7.) The **Authorization Client ID** and **Authorization Secret** can be found via the Netsmart Developer Console.
  - a. UAT URL Link: <https://oauthtest.netsmartcloud.com/>
  - b. PROD URL Link: <https://oauth.netsmartcloud.com/>
  - c. If you are unable to login to the aforementioned sites, or do not see your Organization listed under “Your Applications”, please reach out to your Netsmart resource.



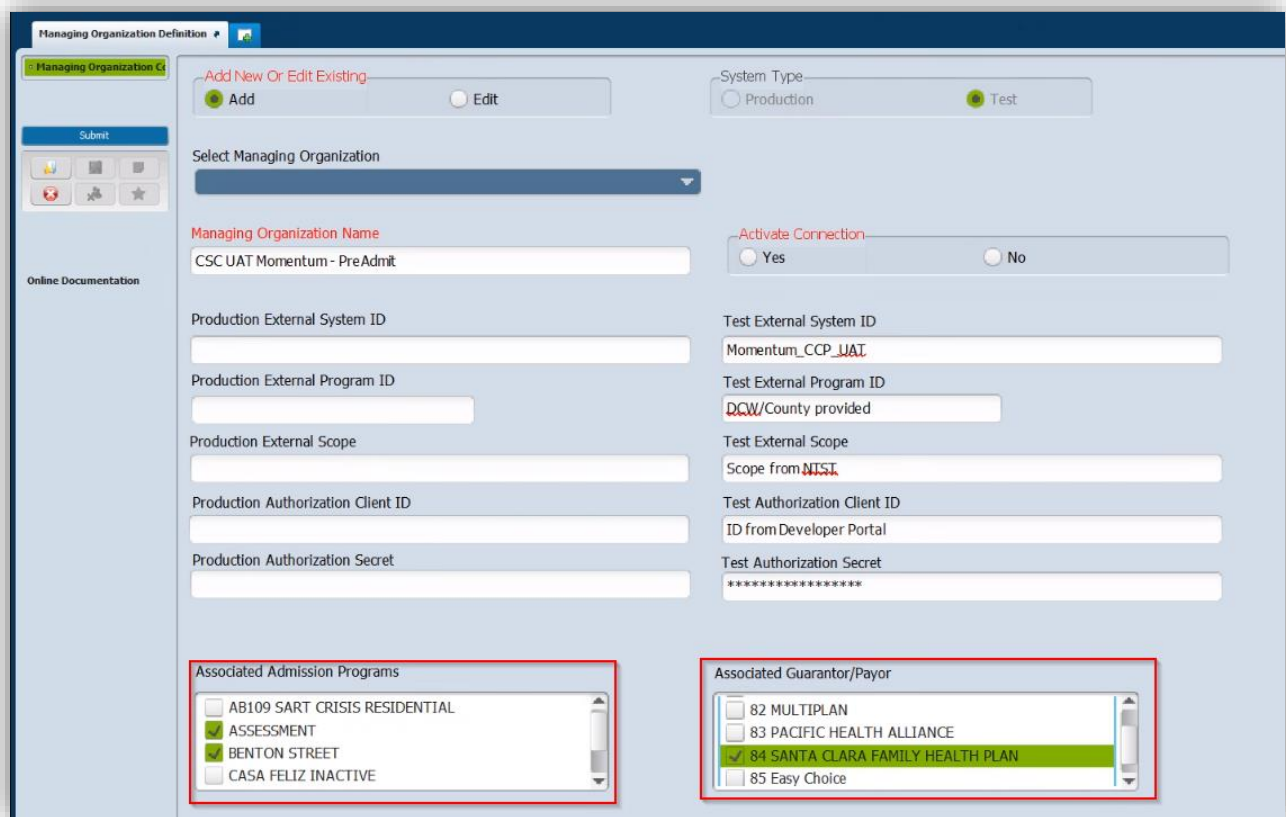
8.) Once all of the prior fields have been completed, set the **Active Connection** radio button to “Yes”.



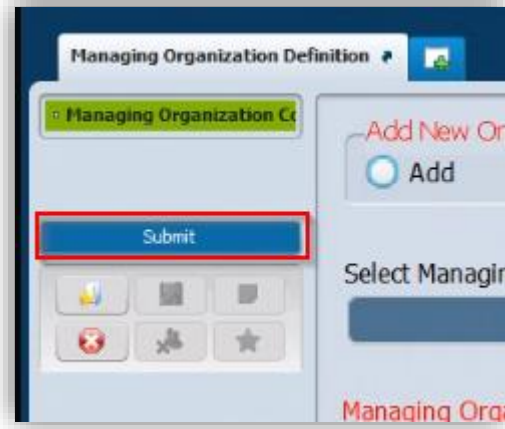
This will enable the defined Managing Organization to be selected from the **External Organization** dropdown list on the “ProviderConnect Enterprise Identifiers” tab within the Admission form.



9.) Finally, select the appropriate **Associated Admission Programs** and **Associated Guarantor/Payers** using the checkbox selection lists at the bottom of the form. If you are unsure of which values to select in either of these fields, please reach out to your organization’s leadership.



10.) Once all of fields are entered, and the correct selections have been made, click the Submit Button.



# Managing Organization Dictionary Mapping

---

## Managing Organization Dictionary Mapping

Purpose: configure dictionary mappings for provider to managing organization. Multiple organization connections are supported.

This must be completed for each dictionary defined in the **ProviderConnect Enterprise Dictionary Guide** for applicable workflows. Select the appropriate dictionary code/value defined within your system and associate it to the corresponding County-defined (External) code. Alternatively, there is a spreadsheet that can be imported.

## Assumptions

- Every **required** field must be mapped (many to 1 is acceptable), a perfect 1:1 match (CCP code 3 matches values to County code 3), or removed from the CCP dictionaries.
  - If a code is sent that the County doesn't have, the entire message will be rejected.
- **Optional** fields do not need to be mapped to a county code. Instead, they will need the "Clear Value When Sending" set to "Yes" for each code that has no county equivalent. This will send a null value to the County with that associated API, so nothing will appear within the County myAvatar for that particular field/value.
- If the County has a dictionary value the CCP doesn't have, it does **not** need to be mapped or added to the Provider's Avatar, unless it's a required field and the CCP has nothing defined on the dictionary.
- If there is no mapping from the CCP, we will send the code the CCP has (so product forms do not need to be mapped)
- If there is no mapping from the CCP, a GET transaction from the County will use the code the County has if there is no mapping in place for that given dictionary.
- If you're updating client demographics from the CCP side and pulling from County if there is a – Many:1 (CCP:County), the CCP system will get updated with the *first* mapping.

Managing Organization Dictionary Mapping

Managing Organization: Internal PCE QA MH

Application: Avatar PM

Dictionary File: Client

Data Element: (158) Source Of Admision

Data Element Description  
 Data Element Number

Dictionary Entry: Clinic Referral (2)

External Code: 16

External Value: Physician or Clinic Referral

Clear Value When Sending:  Yes  No

File Mapping  
Delete Mapping

Submit

Online Documentation

# Practitioner Enrollment

There is a means of automatically mapping all practitioners. Please contact your Netsmart representative for assistance.

Should there be less than 10 practitioners, please follow the step outlined below:

Open the **Practitioner Enrollment** form for each practitioner that has been mapped for ProviderConnect Enterprise, and re-submit the form. A practitioner will need to be mapped to any additional active Managing Organization, re-submitting this form will trigger the mapping sequence.

**NOTE:** No changes will need to be made on the form prior to submitting.