OREGON PROVIDER DIRECTORY (OPD) TRAINING MATERIALS

FOR

OREGON HEALTH INFORMATION TECHNOLOGY (HIT) PORTFOLIO

5 AUGUST 2019

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for the

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1.1   BACKGROUND

The Oregon Provider Directory (OPD) architecture lies on the Salesforce platform to deliver a scalable cloud-based technology. User registration and access to the OPD is provided via OneHealthPort Single Sign-on (SSO) capability. The OPD system provides the authorization to access data and functionality according to the assigned role (see Figure 2: Standard End User Permissions within Provider Directory).

The OPD is a resource for Practitioner and Organization information including demographics, addresses, affiliations to clinics, etc. The OPD is intended to achieve administrative efficiencies and facilitate efforts by OHA and health systems, health plans, and other organizations to serve operational, analytic, and health information exchange needs.
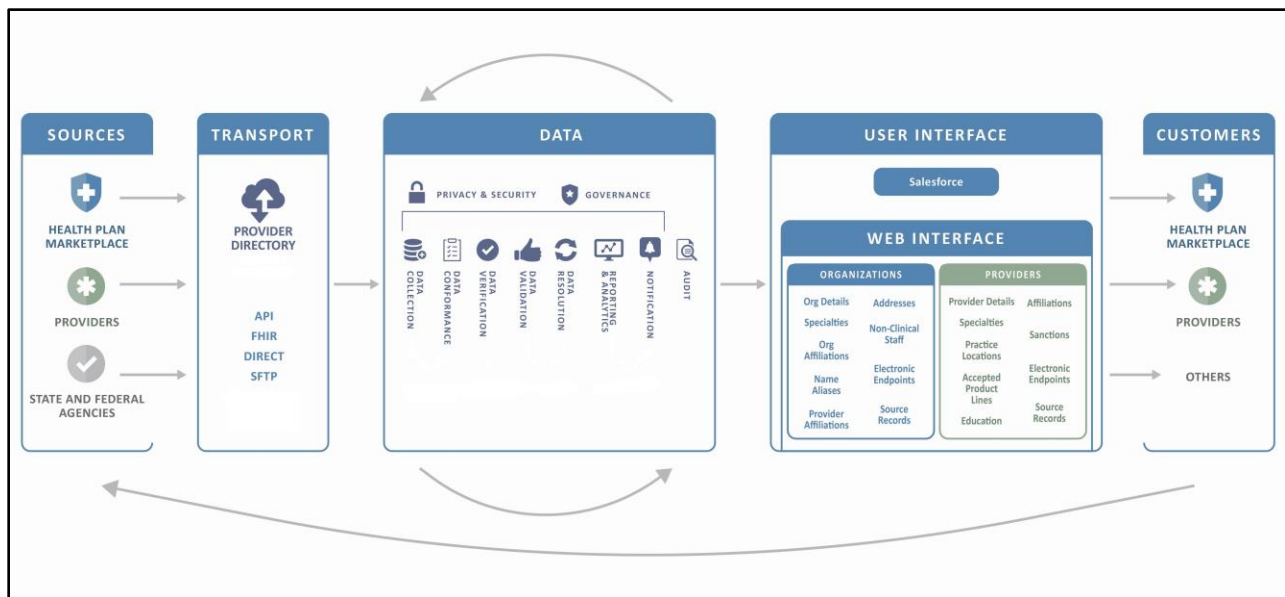
Figure 1: Provider Directory Concept

The OPD serves the following functions:

- Be the trusted source of Practitioner and Organization's general data such as name, address, phone, National Provider Identifier (NPI), specialty, etc.

- Identify relationships between individual practitioners and their affiliated organizations, such as clinics, hospitals and health systems, health plans, etc.

- Identify provider information needed to facilitate exchange of patient health information, including Direct Secure Messaging (DSM) addresses and other information to facilitate exchange.

- Store master Practitioner and Organization information to allow other directories to improve their data.

- Provide Data Steward/Data Curation to ensure OPD data is updated and maintained, so that directory provides reliable, validated, up-to-date Practitioner and Organization information.

- Determine quality of practitioner data associated to the same Practitioner or Organization from multiple data sources and assign a quality metric.

- Enhance care coordination across disparate providers and around transitions of care by providing information needed to facilitate access to Practitioner and Organization information.

- Support community, Coordinated Care Organization (CCO), OHA and health plan analytics that rely on attributing Practitioners and Organizations.

- Create efficiencies for operations, analytics, oversight, and quality reporting for Medicaid and OHA programs, as well as for CCOs, local health plans, health systems and Practitioners and Organizations.

1.2   RECOMMENDED WEB BROWSERS

The OPD system requires a modern browser and standard internet connectivity. The user must have a modern web browser that supports Content Security Policy (CSP) (e.g. Edge, Chrome, Firefox, and Safari) running TLS 1.2 or higher. The OPD application runs on any computer with an internet connection and supports the following browsers[1]:

- Google Chrome™, most recent stable version. Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

- Mozilla® Firefox®, most recent stable version. Salesforce makes every effort to test and support the most recent version of Firefox.

- Microsoft Edge®, most recent stable version. Edge applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Edge.

- Apple® Safari® versions 5.x, 6.x and 7.x on Mac OS X. There are no configuration recommendations for Safari.

Note: Microsoft Internet Explorer (IE) browser is supported within the Oregon Provider Directory System, but users may see slower processing or performance responses. Additionally, users of IE will be more susceptible to security vulnerabilities when using the browser to access secure sites such as the Oregon Provider Directory. Microsoft Edge is the replacement browser recommended

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[1] Salesforce Supported Browsers for Lightning Experience, Copyright 2017, https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5

by Microsoft for best performance and security protection while using the Oregon Provider Directory. Microsoft Edge is the replacement browser recommended for use by UAT Testers.

1.3   ONEHEALTHPORT TRAINING MATERIAL

To access the OPD, users must first have a Single Sign On (SSO) account within OneHealthPort. All users will login through OneHealthPort whenever they wish to access the OPD.

The following sections will describe how to register an Organization within OneHealthPort and then create Subscriber accounts associated to the Organization (See section 1.6 Online Registration Process and OneHealthPort Onboarding) as well as other administrator functions available to any user set up as an administrator account within OneHealthPort. Once a user's OneHealthPort account has been created and an appropriate role has been added, the user may access the Oregon Provider Directory.

In addition to the written material, the following general instructional videos will be available to users for all HIT Portfolio projects (PD and CQMR):

- How to Register an Organization
- How to Affiliate Providers

1.4   ONEHEALTHPORT ROLES FOR THE PROVIDER DIRECTORY

OneHealthPort offers many roles to their user community that are applicable to the OPD system and will grant the user a basic set of permissions to access and utilize standard features of the OPD. These applicable OneHealthPort roles are captured in Table 1. Additionally, elevated permissions on an existing account may be requested and granted within the OPD system as described in section 2.7.

Table 1: OneHealthPort Roles for Standard Users within Provider Directory

PD Program: Applicable OneHealthPort Roles		
Billing Specialist	Medical Assistant	QA Report Manager
Credentialing Manager	Medical Director Office	Quality Reports (view only)
EFT Administrator	Office Worker	Quality Reports and Data Entry
Licensed Nurse	Other Service Provider	Referral Coordinator
Licensed Practitioner	Office Manager	

Any OneHealthPort role identified in Table 1 is considered a standard user within the OPD and will have permissions to perform tasks.
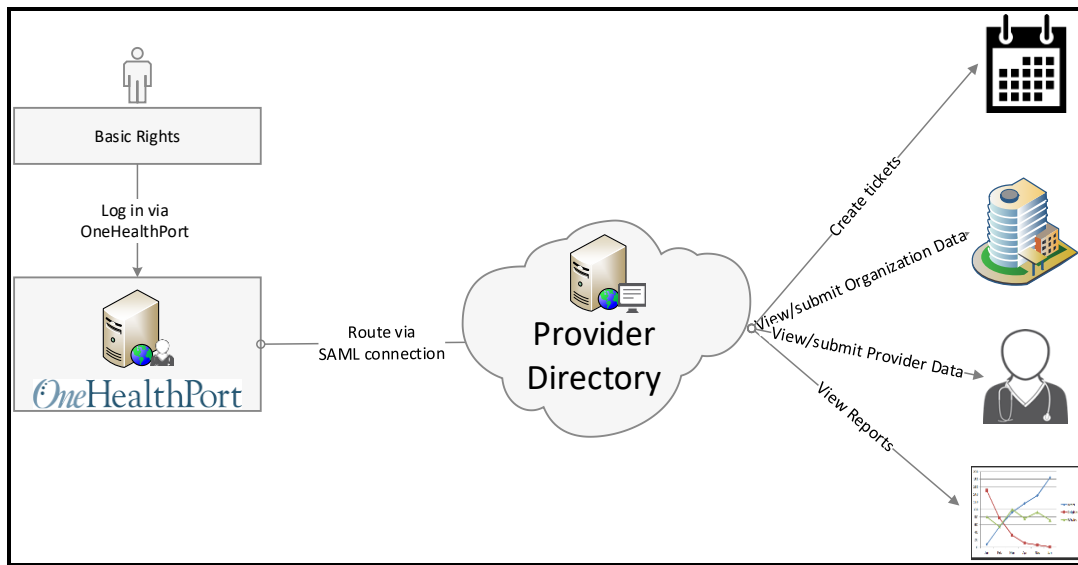
Figure 2: Standard End User Permissions within Provider Directory

1.5   ONLINE REGISTRATION PROCESS AND ONEHEALTHPORT ONBOARDING

OneHealthPort has provided the attached step-by-step setup guide to create subscriber accounts within OneHealthPort as applicable to the OPD program. This guide will be available within the OneHealthPort website (http://www.onehealthport.com).

Step by step guide:
https://www.oregon.gov/oha/HPA/OHIT/Documents/OHP_StepByStep_Guide_PD.pdf

1.6   ADMINISTRATOR WRITTEN TRAINING MATERIAL

OneHealthPort also offers many training guides, SSO instructional content, and FAQs for their community of users. Attached is the administrator guide offered by OneHealthPort. Each organization must designate at least one administrator within OneHealthPort who will have the ability to add, manage, and update subscriber accounts within OneHealthPort.

1.7   LEGAL AGREEMENTS

All users must first be affiliated to an organization that has executed legal agreements with OHA. For the latest organizational participation agreement, visit the OPD information page at: https://www.oregon.gov/oha/HPA/OHIT/Pages/PD-Onboarding.aspx.

Before an end user can access the OPD, OHA will determine if the user's organization qualifies as a Medicaid entity and execute all legal agreements with the organization.

2.0   END USER WRITTEN TRAINING MATERIAL

The following sections will describe OPD functionality for standard end users. All of the following sections assume the user has already received a OneHealthPort account, their Organization has executed all necessary legal agreements, and the user has successfully logged into the OPD through OneHealthPort.

2.1   BASIC FUNCTIONALITY

The basic functionality training material will describe an overview of the OPD application, including screen layout, tabs, navigation, and viewing user account information.

2.1.1   Screen Layout & Navigation

After logging in through OneHealthPort using an appropriate role, the OPD user will land at the following Home Page (see *Figure 3*) with a series of tabs across the top header.
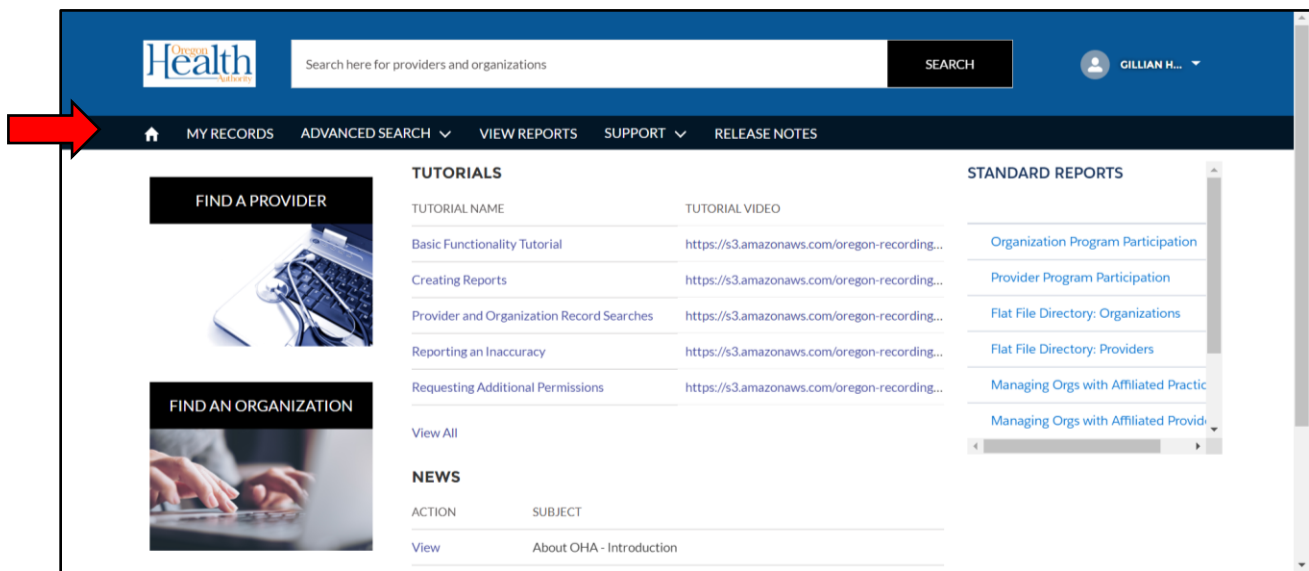

Figure 3: Provider Directory Home Page

The following list describes the Home Page tabs:

a. **Home Icon**: brings users back to the main landing page. Users may use the back button in the web browser to navigate to previous pages if needed.

b. **My Records:** displays records for which the user is the data source

c. **Advanced Search:** allows user to conduct a Provider or Organization search using various criteria

   d. **View Reports**: allows a user to view the Standard Reports, Shared Reports, and My Reports

   e. **Support:** provides ability to submit support tickets if needing assistance, to view open tickets and to view tutorials; provides an alternative method for creating a new provider or organization record

   f. **File Uploader**: visible only if user has Batch Data Contributor permission; provides ability to submit provider and organization data by uploading a file

   g. **Release Notes**: provides updates to the latest OPD release compared to previous release

2.1.2   My Profile Page

On the Home Page, the OPD displays the username along with a drop-down menu in the top right corner. This menu allows users to access their OPD profile information (see Figure 4: User Profile Navigation List). Proceeding from top to bottom, each selection has been further described below.
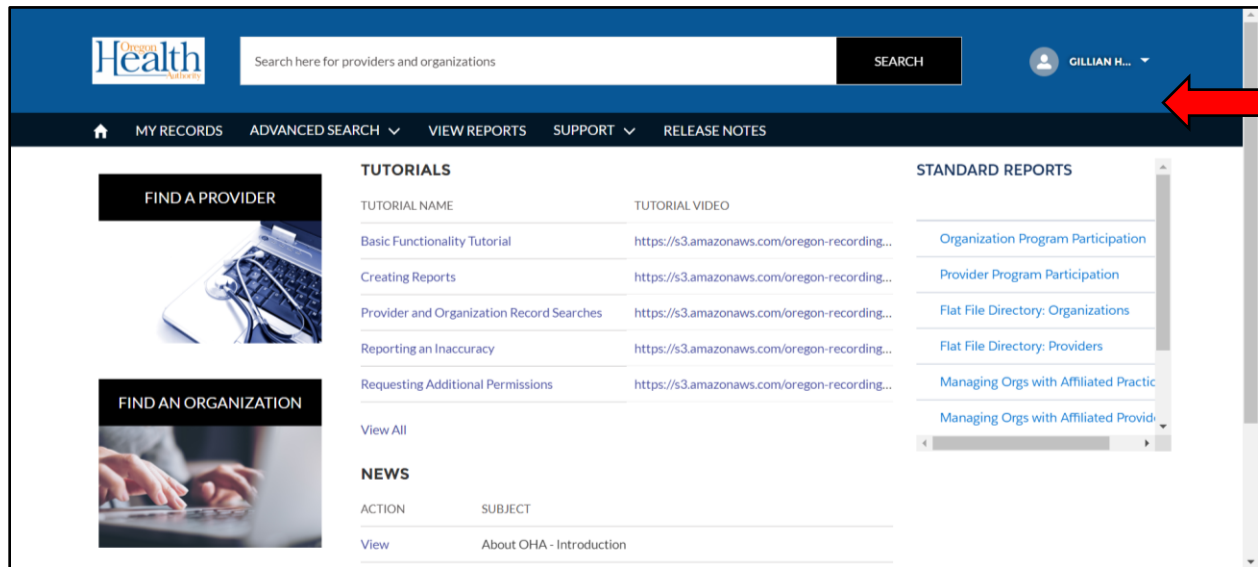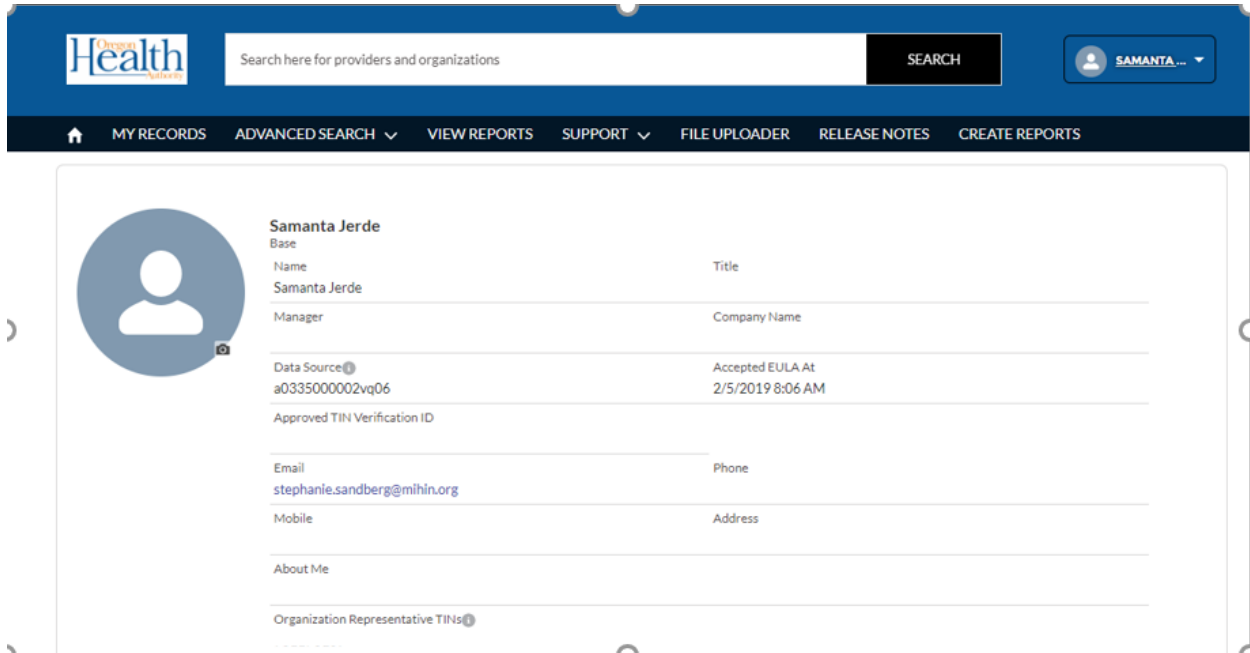

Figure 4: User Profile Navigation List

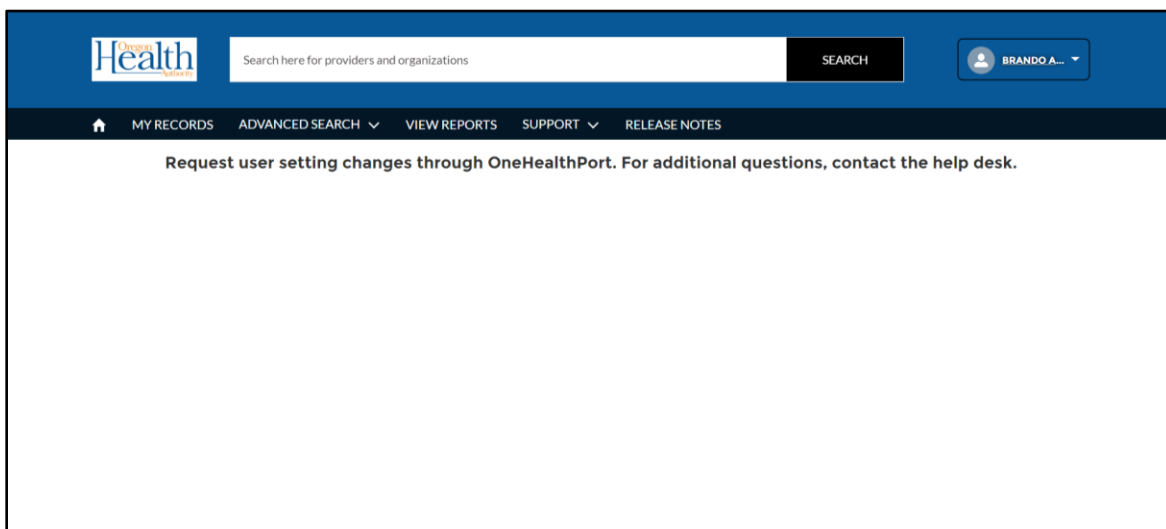The following list describes the User Profile drop down options available:

   a. **Home**: returns users back to the main page

   b. **My Profile:** navigates users to their personal information within the OPD where they can view their information (See *Figure 5*) such as the user's name, email, and associated organizations. Any tickets submitted by the end user are viewable through "Your Related Tickets". This screen also allows the user to request additional permissions (refer to section 2.7 Requesting Additional Permissions for more information).

   c. **My Settings**: refers user back to the OneHealthPort account settings (See Figure 6: My Settings)

d.   **Contact Support:** provides Help Desk contact information and an option to submit a
     ticket

e.   **Logout:** signs users out of the OPD and returns to the OneHealthPort Single Sign-on
     page

Figure 5: My Profile

Figure 6: My Settings

2.2   SEARCHING RECORDS

The OPD offers multiple strategies for on-demand searches. The first strategy includes both a basic or advanced option to search for all entities within the directory. The second strategy utilizes the tabs (My Records and Advanced Search) to limit the search by entity type.

2.2.1   Searching from Home Page

Clicking the Home Icon will navigate the end user to the home page with two search buttons: "Find a Provider" and "Find an Organization." (see Figure 7: Find a Provider and Find an Organization)

Clicking the "Find a Provider" button will yield an Advanced Provider Search field for use.

Clicking the "Find an Organization" button will yield an Advanced Organization Search for use.
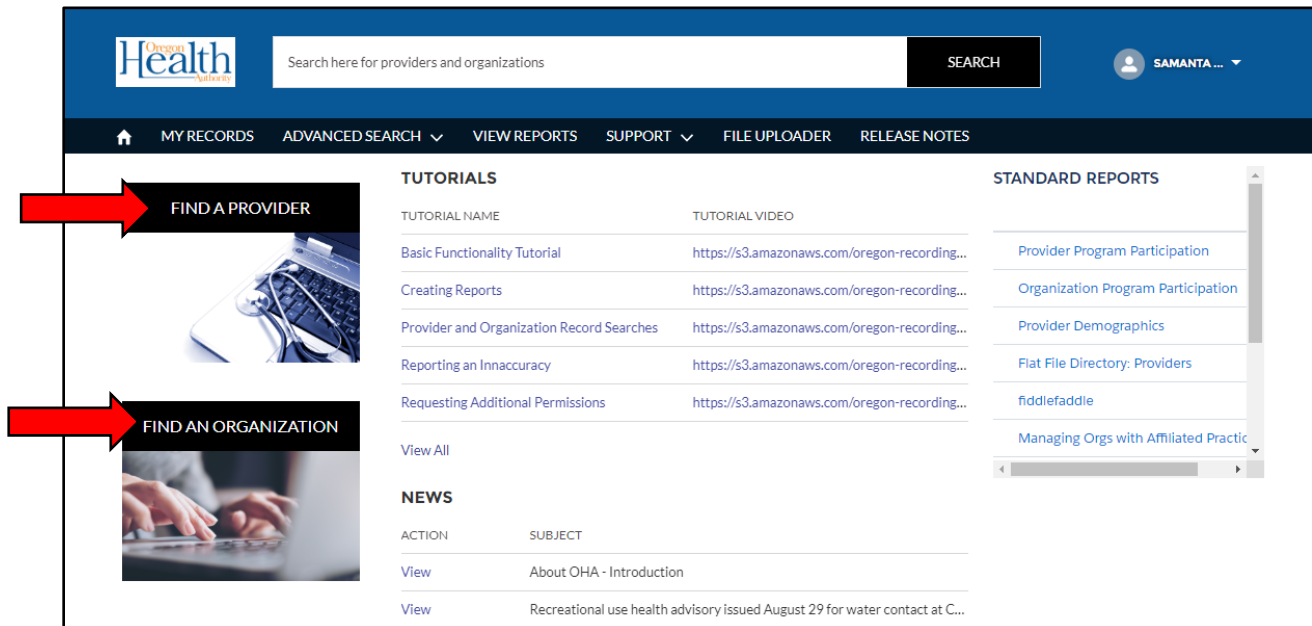
Figure 7: Find a Provider and Find an Organization

2.2.2   Basic Search

The basic general search is accomplished through the search bar that spans across the top of the OPD home page. This search bar can be utilized to find information on any OPD object by simply typing the associated name and clicking the 'Search' button.

The search will return any related items as illustrated in the following example (see Figure 8: Search Bar Results) when the search criteria was entered as 'pediatric'. The search bar can be used to locate names, identifiers, addresses, specialties, and other unique data elements.
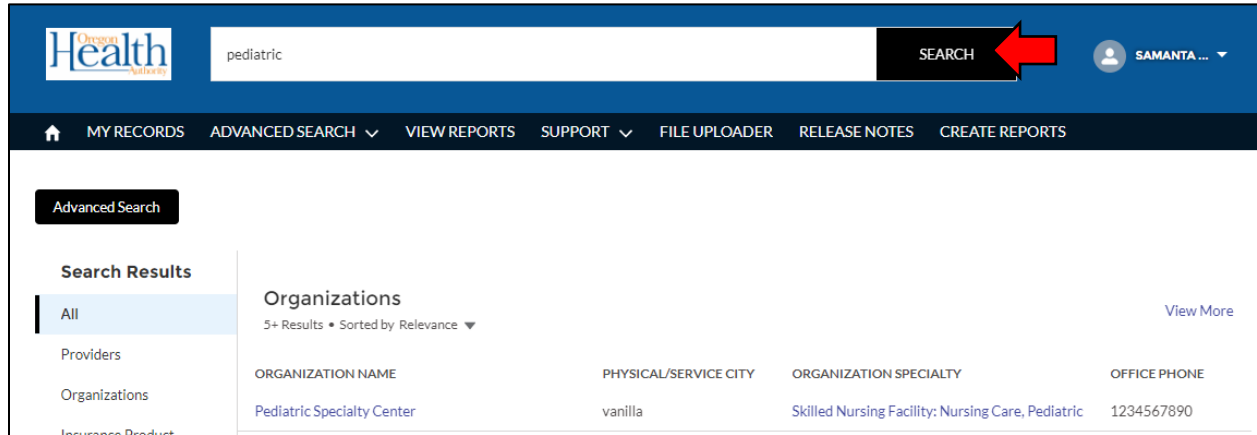

Figure 8: Search Bar Results

2.2.3   Advanced Search

In addition to the basic search option, a user can also complete an Advanced Search for Providers and Organizations to narrow down the search with additional search criteria.

Users can access the Advanced Search features by clicking the "Advanced Search" button which appears once a basic search is conducted

Once the button is selected, the user can specify extra search criteria as displayed in Figure 9 and Figure 10: Advanced Organization Search.

Users can also access the Advanced Search features by clicking the "Advanced Search" tab on the black ribbon across the Home Page or the search buttons on the Home Page (see red arrows in Figure 7: Find a Provider and Find an Organization).

The advantage of the advanced search option over the basic search option is the ability to incorporate multiple data fields (e.g., NPI and last name) into the search to find the desired record. Partial searches are also allowed in the advanced search option to find the desired record.

Note that search results from 'Advanced Search' in the user interface and FHIR API queries may differ. FHIR API queries are deterministic and only finds records that contain an exact match, while 'Advanced Search' is broader and finds all the records containing similar terms. For example, a search for 'Derek Shepherd' in the Advanced Search will yield all results containing 'Derek' or 'Shepherd.' A search for 'Derek Shepherd' using FHIR API will only yield results that are an exact match.
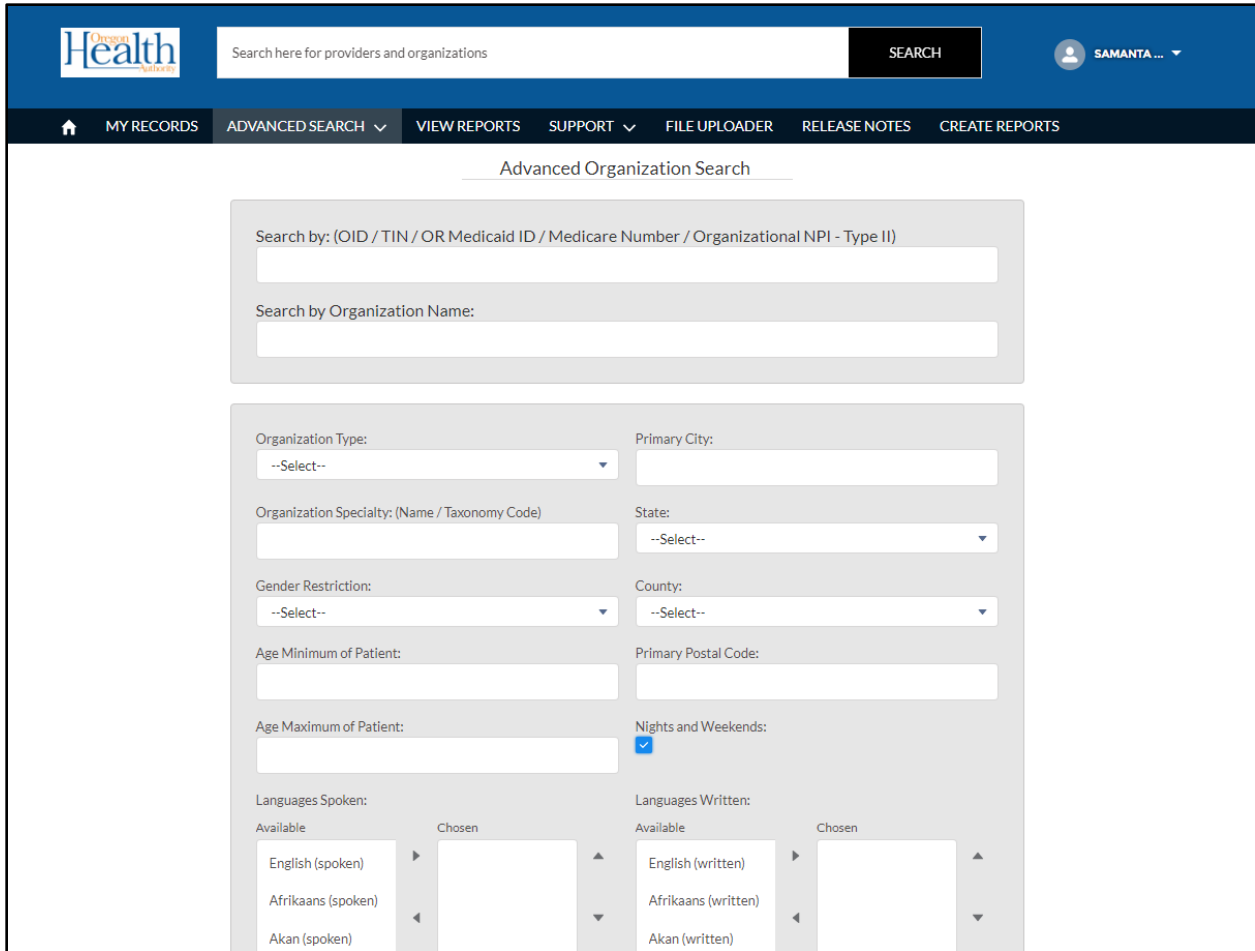
Figure 9: Advanced Provider Search

Figure 10: Advanced Organization Search

2.2.4   Searching from My Records Tab

In addition to searching for data from the 'Search Bar' (basic search) or using the advanced search tool, users can also navigate and search the OPD via the My Records tab found in the black ribbon across the Home Page.

The My Records tab initially opens to the My Provider Source Records page (see Figure 11: My Records - Provider Source Record). Users have the option of navigating to the Providers, Organizations, Provider to Org Affiliations, or Org to Org Affiliations Source Record pages by selecting the appropriate sub-section listed underneath the black ribbon.
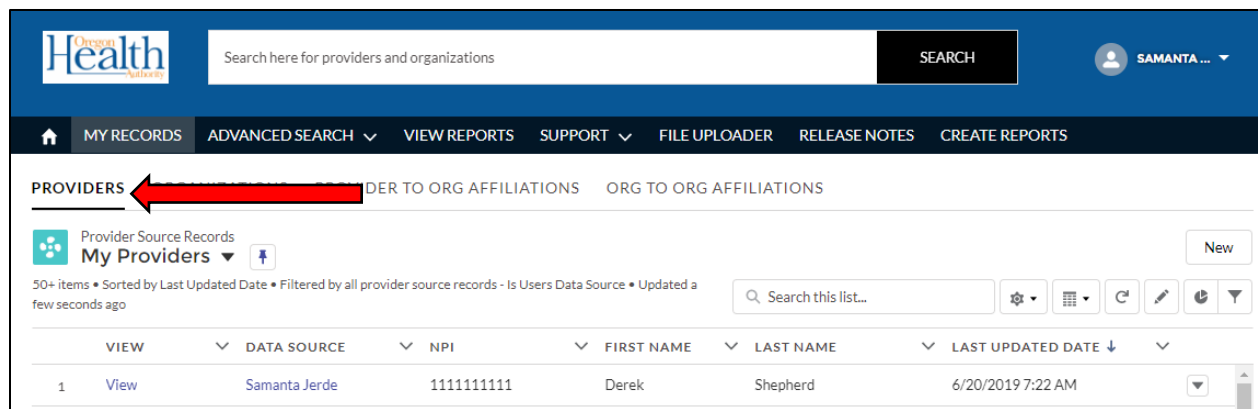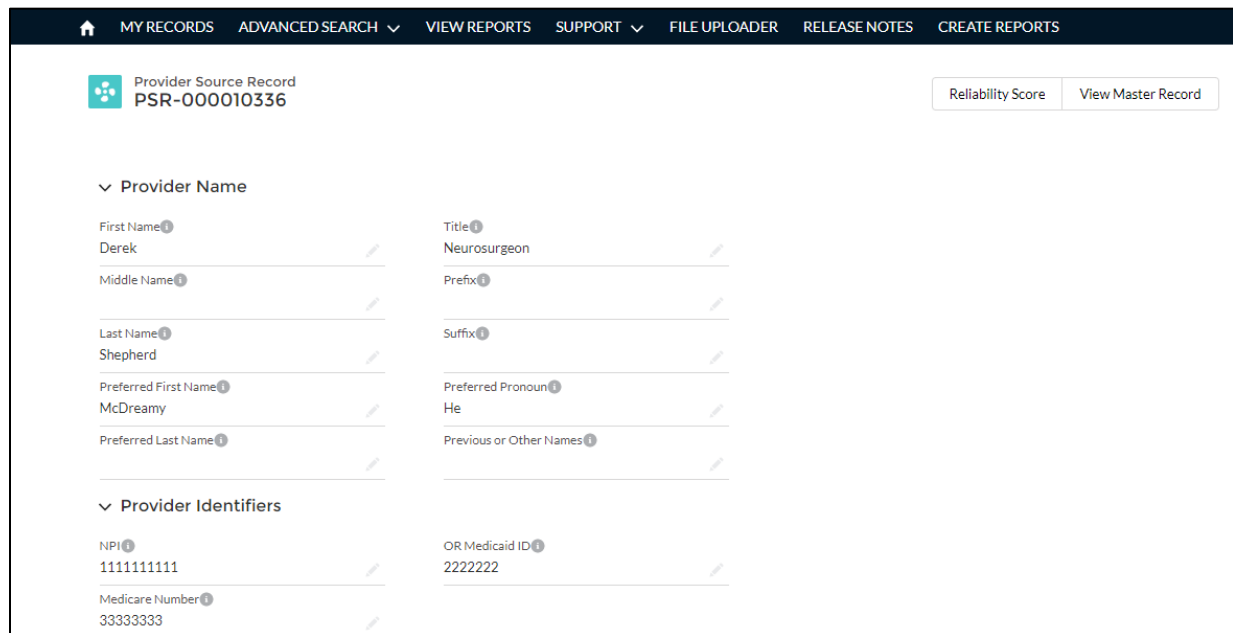
Figure 11: My Records - Provider Source Record

All the records presented within the My Records tab will be for Source Records where the user is the Primary Data Source.

If the user clicks on any of the column headers, the records will be sorted in ascending or descending order, accordingly. This is useful when the user is not sure of specifics and wants to navigate by unique fields, for example, First Name, Last Name or NPI.

The record formatting and filter capabilities remain the same across all the My Records sub sections (Providers, Organizations, Affiliations and Organization Affiliations).

By selecting a record, users can view additional details as in Figure 12: Provider Source Record.

Figure 12: Provider Source Record

2.3   VIEWING RECORDS

2.3.1   Viewing Organization Master Records

One or more Organization source records roll up to create an Organization master record. The top card that appears on the master record is the result of an algorithm that considers the number of source records available and the trust preferences of each source as determined by OHA on a field-by-field basis. The top card presents a quick synapsis of the most valuable information about the organization.

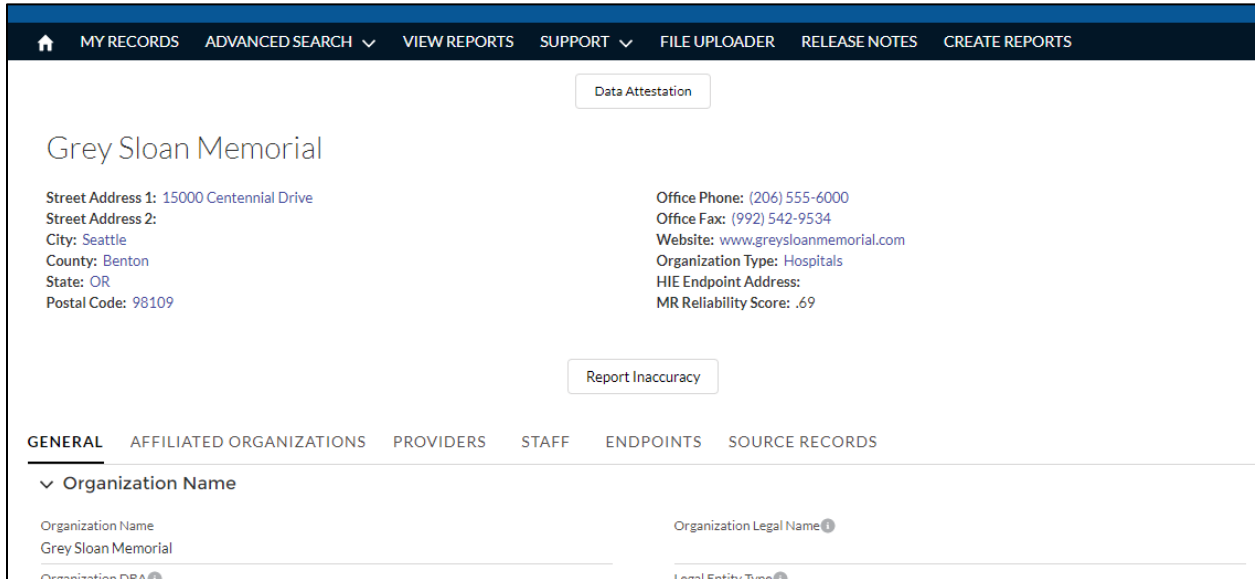Organization Master Record Top Card displays:

- **Organization primary address**: street, city, county, state, zip

- **Organization type**: such as Practice/Clinic

- **Website**: organization's primary email address

- **Contact information**: phone and fax number

- **HIE Endpoint address:** primary endpoint address for the organization

- **MR Reliability score:** level of reliability for a particular master record

Organization Master Record Tabs displays:

- **General**:
    - Organization Name
    - Organization Identifiers (NPI, OID, MMIS)
    - Organization Type and Specialty
    - Accessibility
    - Physical/Service Location
    - Mailing Address
    - Billing Information
    - Legal Address
    - Hours of Operation
    - Licenses
    - EHR: organization electronic health record information
    - System Fields

- **Affiliated Organizations**: practice locations, and affiliation status reports

- **Providers**: a listing of practicing providers for the organization

- **Staff**: organization staff member's role and contact information

- **Endpoints**: a hyperlink, type name and address to specified electronic endpoints

- **Source Records**: data sources, a source hyper-link, and last updated and last validated time/date stamps

More information about Master Records is available in *section 2.3.3 Viewing Provider Master Records*.

Figure 13: Organization Master Record

Organization Endpoints display:

- **Record Link:** link to source record

- **Endpoint:** a hyperlink, type name and address to specified electronic endpoints

- **Endpoint Type:** such as IHE endpoint, Direct Secure Address, etc.

- **Primary:** whether the endpoint is a primary contact or not

- **Address:** endpoint address

- **Data Source:** where/who the data was contributed from/by

Figure 14: Organization Endpoints

2.3.2 Viewing Staff Records

From the Organization master record, users can navigate to the staff records as well. Non-clinical staff will be matched by email address since they do not have an NPI or license number.

 Staff displays:

- **Record Link:** link to source record

- **First Name:** non-clinical staff first name

- **Last Name:** non-clinical staff last name

- **Status:** whether the staff member is active or not

- **Role at Organization:** non-clinical staff title or role

Figure 15: Staff Records

2.3.3   Viewing Provider Master Records

Similar to Organizations, when a user selects a Provider the master record is presented with a "top card". The top card presents a quick synopsis of the most valuable information about the provider. The user can additionally click on any of the data fields presented as a hyperlink to view the data source(s) that contributed to the specific data field.
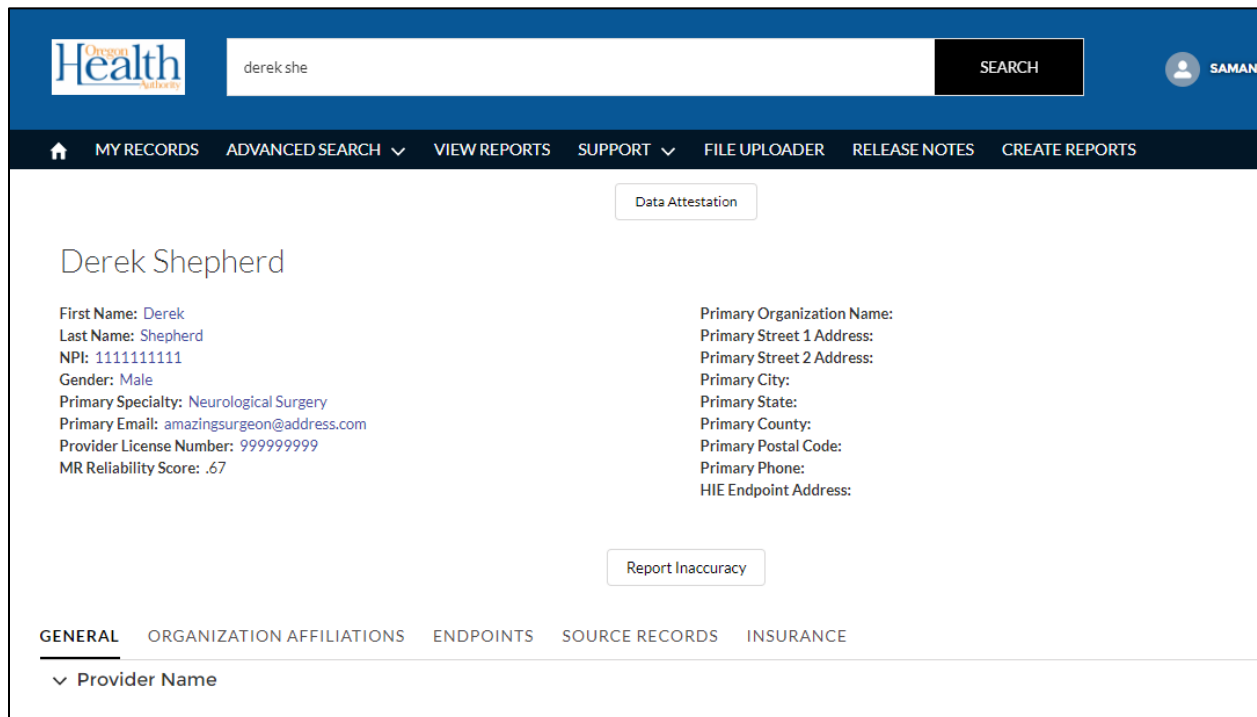
Provider Top Card displays:

- **Identifiers**: First name, last name, NPI

- **Provider characteristics:** primary specialty, gender, provider license number

- **MR Reliability score:** level of reliability for particular master record

- **Provider primary organization**: Organization name, street, city, county, state, zip

- **Primary contact information**: email address, phone, and Direct Address

- **HIE Endpoint address:** primary endpoint address for the organization

Provider Master Record Tab displays:

- **General**:
  - Provider Name
  - Provider Identifiers (NPI, MMIS etc.),
  - Contact Information

- o Provider Type and Specialty

- o Provider Demographics

- o Licenses

- o Education – Degree(s)

- o System Fields

- **Organization Affiliations**: a listing of practices, hospitals and other organizations

- **Endpoints**: a hyperlink, type name and address to specified electronic endpoints

- **Source Records**: hyperlinks, data source name, and NPI information

- **Insurance**: provider insurance participation information

Figure 16: Provider Master Record

Figure 17: Provider Endpoints

2.3.4 Programs

Programs data to be submitted to the OPD must be provided by the program itself, such as the Patient Centered Primary Care Home (PCPCH) program. The program point of contact can become a batch data contributor through the OPD user interface to begin the data source onboarding process. The program can choose a transport mechanism and frequency for data submissions. Programs do not have the option to use file uploader for data quality purposes regarding other file uploader users. Since only programs can enter program information as the source of truth.

Programs display:
- **Detail**
  - Program Name
  - Program Manager
  - Status
  - Start Date
  - End Date
  - Created By
  - Last Modified By
- **Related**
  - Program Participation Name
  - Participation Name
  - Participant
  - Program Year

o Start Date

Figure 18: Program Record

2.4 REPORTS

Reports can be generated for any data for which the user has access to view. The OPD offers users a list of standard reports (see section-**Error! Reference source not found. Error! Reference source not found.**) as well as the ability to create custom reports (see section-2.4.2 Creating Reports). To access the Report Builder feature to create custom reports, end users must go through the "Request an Additional Permission" process.

2.4.1 Viewing Reports

To view reports, the user navigates to the View Reports tab and chooses from the left side reports navigation list options. This report page has three expandable options: Standard Reports, Shared Reports and My Reports.
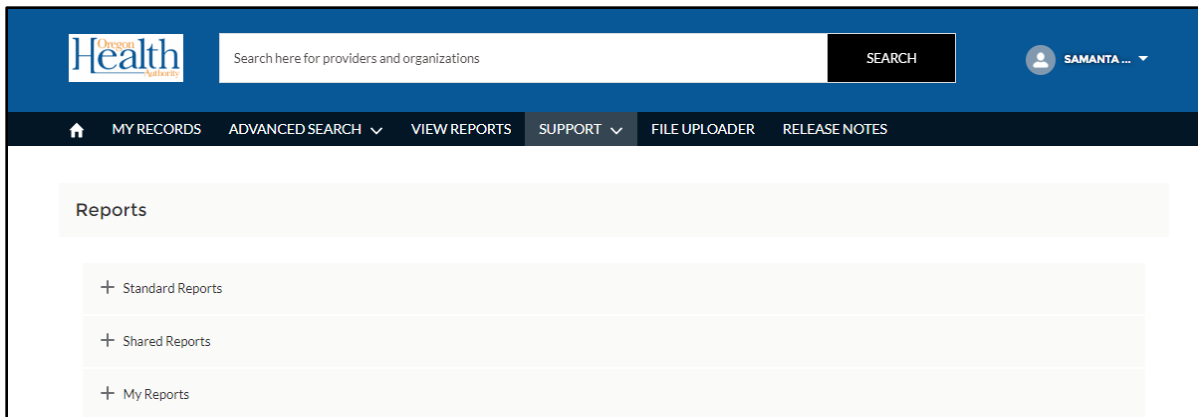
Figure 19: View Reports

View Reports- Navigation List

a. **Standard Reports:**

   o Organization Program Participation
   o Provider Program Participation
   o Provider Demographics
   o Flat File Directory: Organizations
   o Flat File Directory: Providers
   o Managing Orgs with Affiliated Practices
   o Managing Orgs with Affiliated Providers
   o Organization Demographics
   o Practice Locations with Aff Providers

b. **Shared Reports:** additional reports that are deemed useful for the end user

c. **My Reports:** any report that is edited and saved for the specific end user's use

To open a report, click on the report name. For example, the report for Provider Program Participation would appear as Figure 20: Provider Program Participation Report.
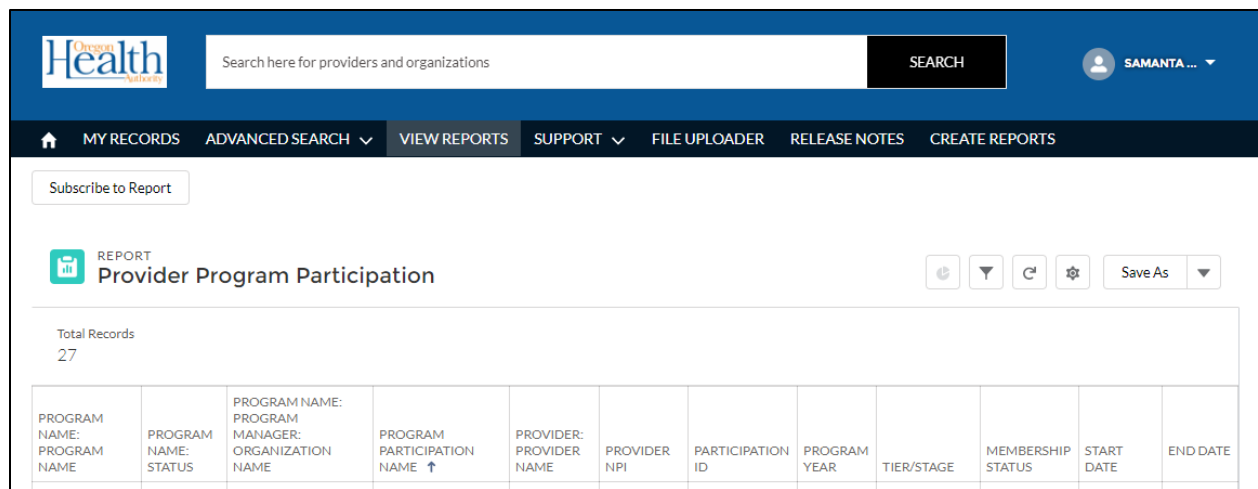
Figure 20: Provider Program Participation Report

Towards the top right, there is a 'Save As' button with an accompanying drop-down. The drop-down arrow allows users to select the report in Excel or CSV format and click Export to save onto their local device as depicted below.
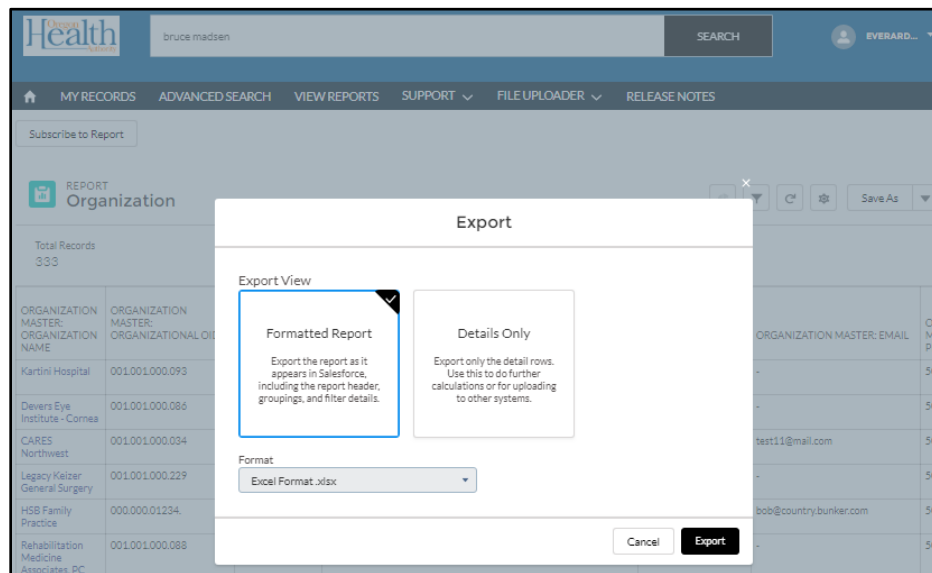
Figure 21: Report Export

The 'Save As' button (Figure 22: Save Report) creates a copy of the report that gives the user two options: 'Make Private' – only the user can find and run this report or 'Move into Folder' where anyone with access to the folder can run the report.

Figure 22: Save Report

If users are interested in routinely receiving the report they can click the 'Subscribe to Report' button available towards the top left on any report page illustrated below:

Figure 23: Subscribe to Report

Subscribing to a report sends a request to the appropriate OPD administrator to add the user to the distribution list that is automatically emailed at the chosen interval (daily, weekly, or monthly).

There are several advantages to subscribing to a report, including but not limited to:

- Continue internal processes – if an OPD user has job duties that directly relate to specific information found within the OPD.
- Convenience – If an OPD user would like to view the same report on a regular basis without having to log into the system and navigate to the report each time.

- Knowledge – If an OPD user would like to remain up to date on current information within the PPD.

Once clicked the following message will appear confirming the user's subscription (See Figure 24: Report Subscription Notification):

Attention:

You have submitted a request to subscribe to this report. If you wish to unsubscribe from this report, please submit a new ticket. Be sure to include the name of the ticket and a link to the record (copy the URL).

Close

Figure 24: Report Subscription Notification

Users who subscribe to a report will be placed in a group to receive that specific report as their preference indicated. Users will receive reports they have subscribed to via email with the information in an embedded table, as illustrated below:

Subject: Report: Sams Hospital Report run at 4/17/2018 11:26 AM

Sams Hospital Report

Run as: Samantha Bolton
Run at: 4/17/2018 11:26 AM

Filtered By:
        Show: All organizations
        Primary Address Line 1 not equal to
        AND Organization Type equals Hospital

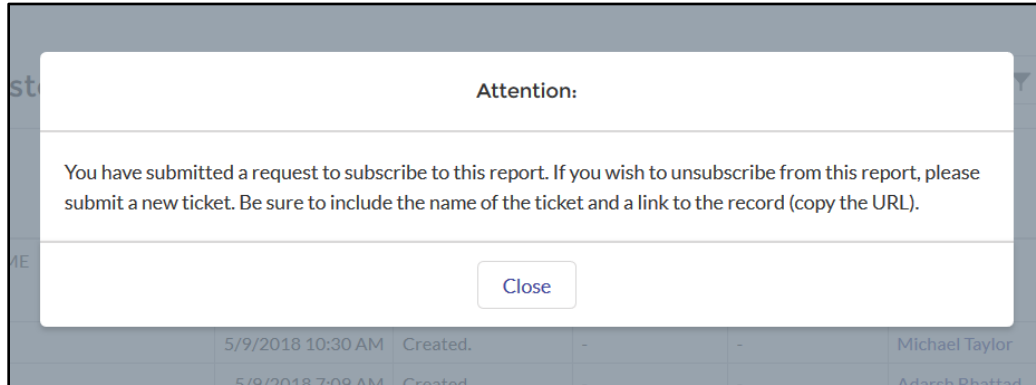| Organization Type	Organization Name	Primary Address Line 1	Primary City	Primary State/Province	Primary Zip/Postal Code
Hospital	GERBER MEMORIAL HOSPITAL	212 S. SULLIVAN	FREMONT	MI	49412
Hospital	St Mary Mercy Hospital	36475 FIVE MILE ROAD	LIVONIA	MI	48154
Hospital	Lakeland Community Hospital Watervliet	400 Medical Park Drive	Watervliet	MI	-
Hospital	MIDMICHIGAN MEDICAL CENTER CLARE	703 N MCEWAN	CLARE	MI	48617
Hospital	McLaren Bay Region	1900 Columbus Ave	Bay City	Michigan	487086831
Hospital	McLaren Port Huron	1221 Pine Grove Ave	Port Huron	Michigan	480603511
Hospital	PROVIDENCE HOSPITAL	16001 WEST NINE MILE	SOUTHFIELD	MI	48037
Hospital	Schoolcraft Memorial Hospital	7870W US Highway 2	Manistique	Michigan	498541599
Hospital	LAKE HURON MEDICAL CENTER	2601 ELECTRIC	PORT HURON	MI	48060
Hospital	CHC - Branch Hospital	274 E Chicago St	Coldwater	Michigan	490362041
Hospital	Detroit Medical Center - Detroit Receiving	42101 St. Antoine Ave Suite 2B UHCDetroit		Michigan	48201
Hospital	Henry Ford Hospital - Main Campus	2799 W Grand Blvd	Detroit	Michigan	482022608
Hospital	HELEN DEVOS CHILDREN'S HOSPITAL	100 MICHIGAN NE	GRAND RAPIDS	MI	49503

Figure 25: Scheduled Report Email Sample

2.4.2   Creating Reports

If a user has reviewed the available standard reports and any other report available through the 'View Reports' tool, and determines a new report is needed, the OPD offers the ability to create custom reports. To access the Report Builder feature to create custom reports, end users must go through the Request an Additional Permission process (see section 2.7 Requesting Additional Permissions).

To create a report, navigate to the Create Reports tab.
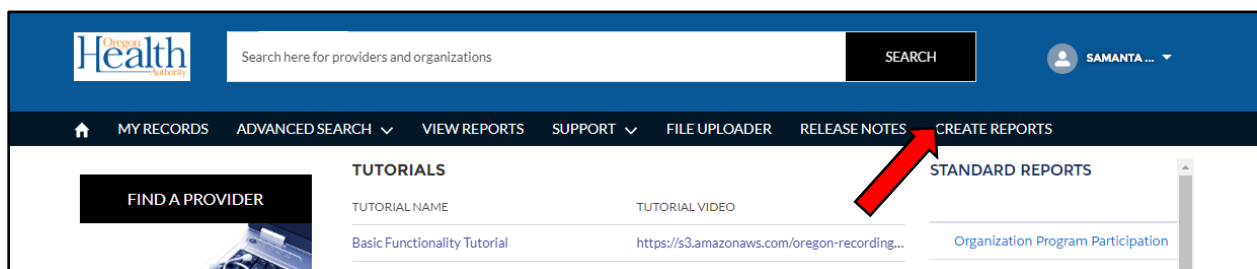
Figure 26: Reports Header

The following page will open for the Report Builder:
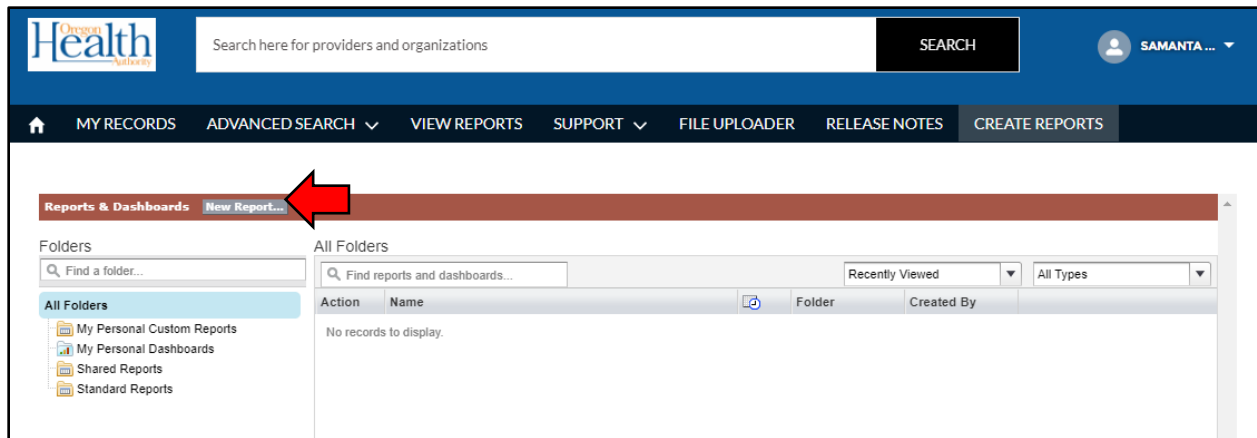
Figure 27: Launch Report Builder
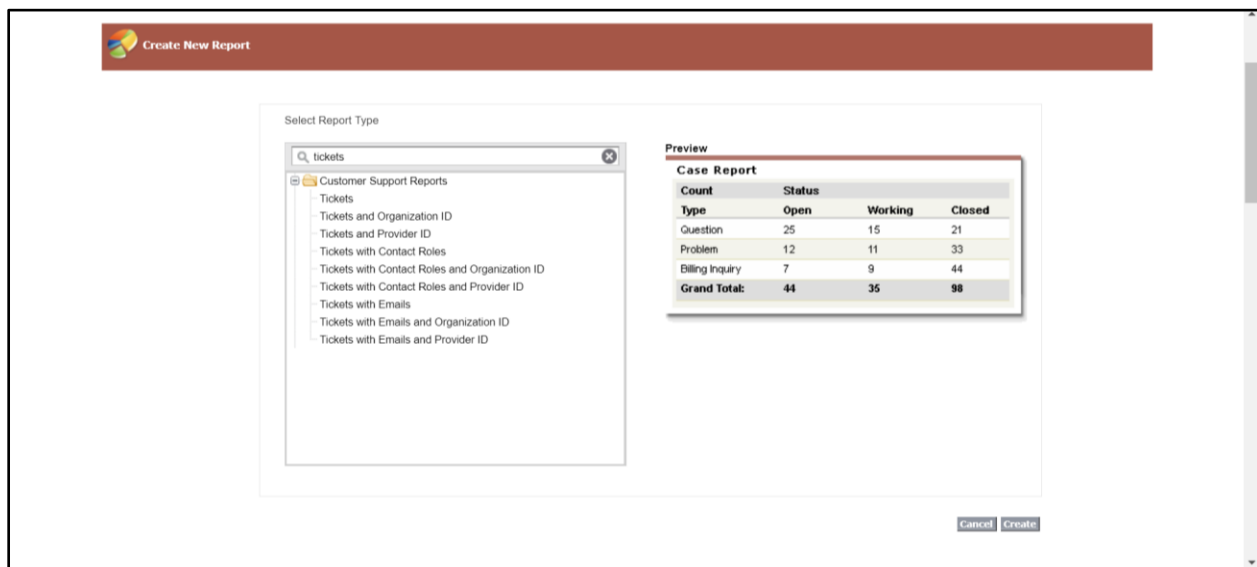
Figure 28: Report Builder Launched

Users can click the 'New Report' button to create a new report. They can also view the same Shared Reports and Standard Reports as they did in the 'View Reports' page by navigating to the respective folder towards the left.

After choosing 'New Report', users will then need to select a report type.

Users can search within the Quick Find tool to find the report type they are looking for. They can also expand the folders to see what specific report types are available within each section. A report type defines the set of records and fields available to a report. Reports display only records that

meet the criteria defined in the report type.2 After users choose a report type, they will need to click the 'Create' button to proceed to the next step.

When first-time users open the Report Builder, the following screen appears with two options in the right upper corner where they can view a "Guided Tour" or "Video Tutorial" of report building (see Figure 29: Report Builder Training Assistance). Should users need additional assistance, this feature is a helpful resource.
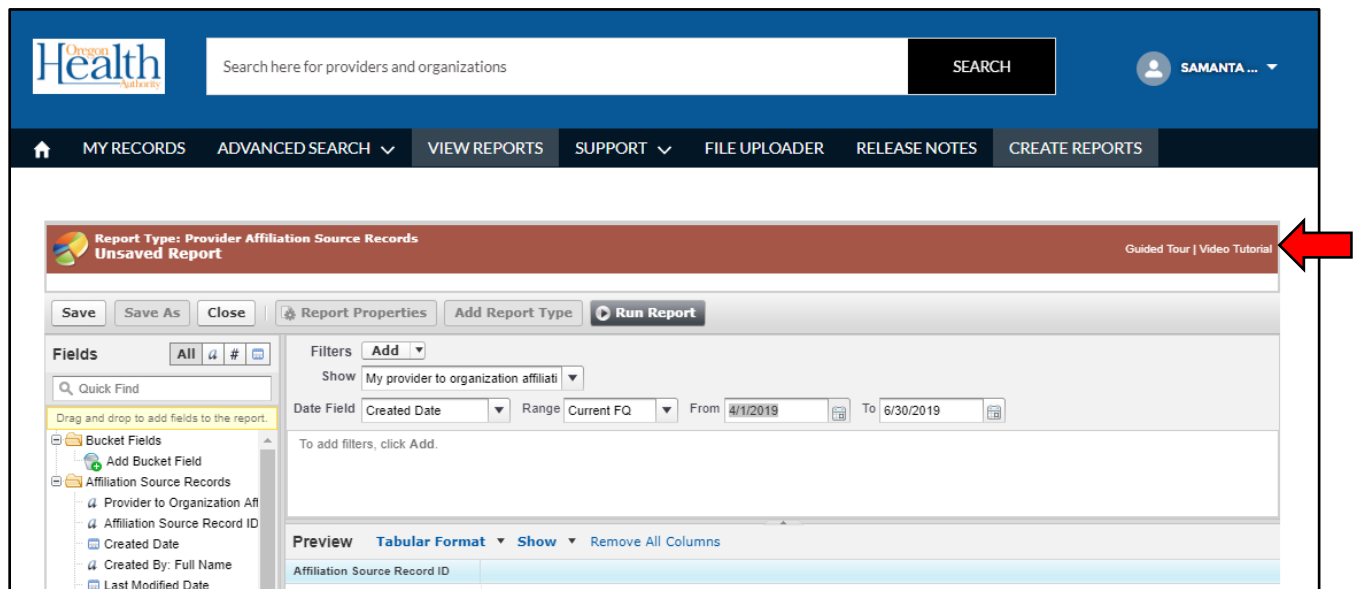
Figure 29: Report Builder Training Assistance

The report can be customized according to the user's needs. Fields on the left can be dragged to the report area on the lower right or the filter criteria on the upper right. Salesforce provides the additional information and images to further describe Report Building. [3]

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[2] https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/salesforce_analytics_overview_cheatsheet.pdf
[3] https://resources.docs.salesforce.com/206/latest/en-us/sfdc/pdf/salesforce_report_builder_impl_guide.pdf
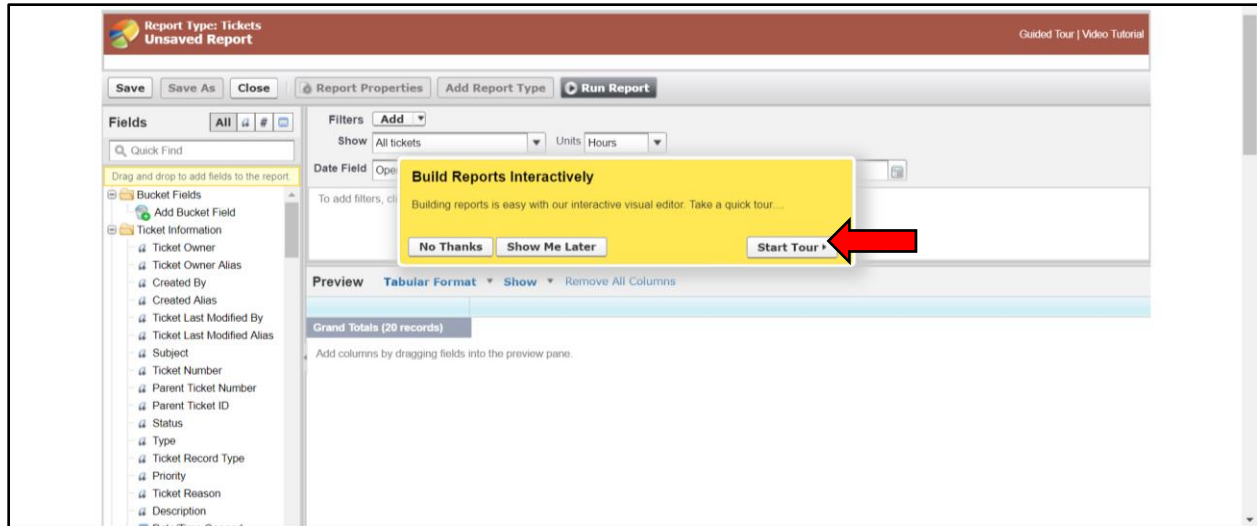
Figure 30: Guided Tour
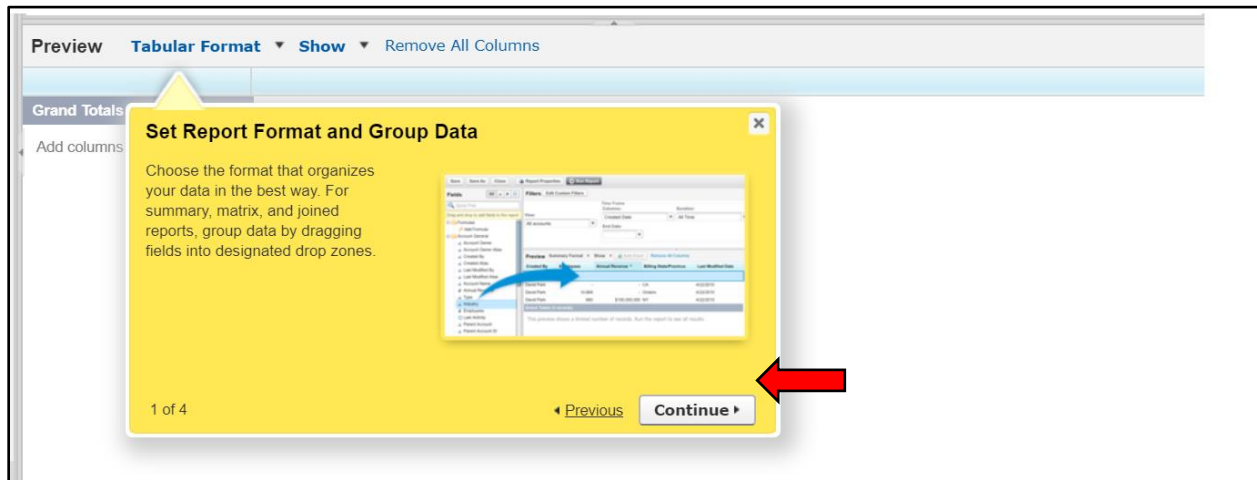
Figure 31: Start Tour
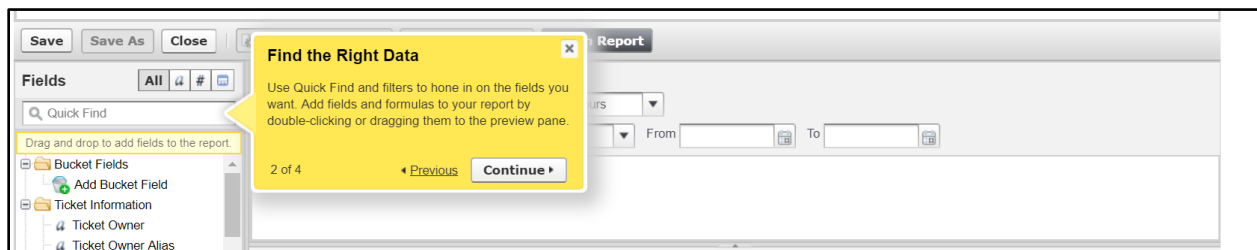
Figure 32: Find the Right Data
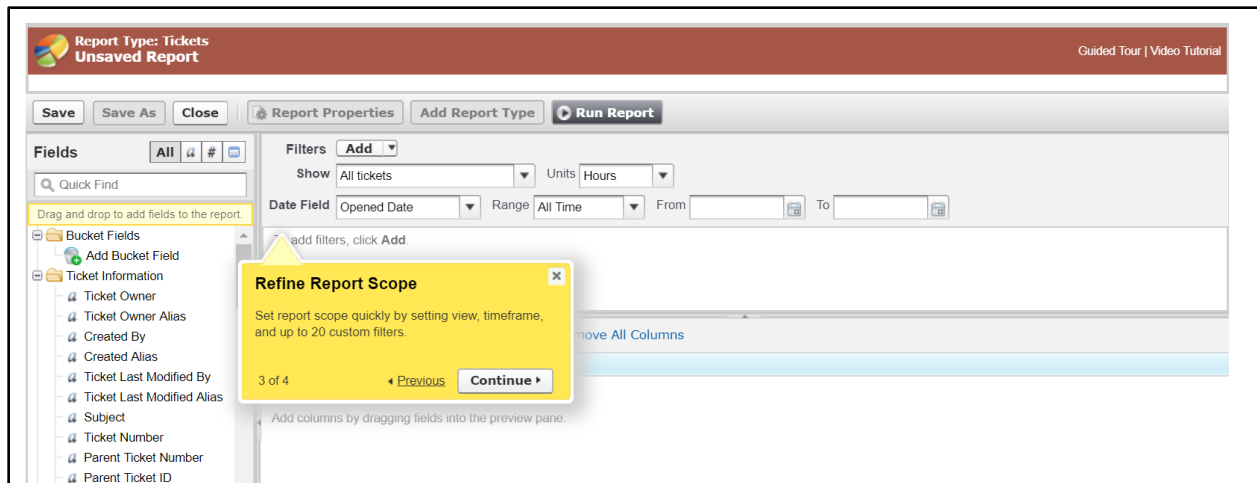
Figure 33: Refine Report Scope
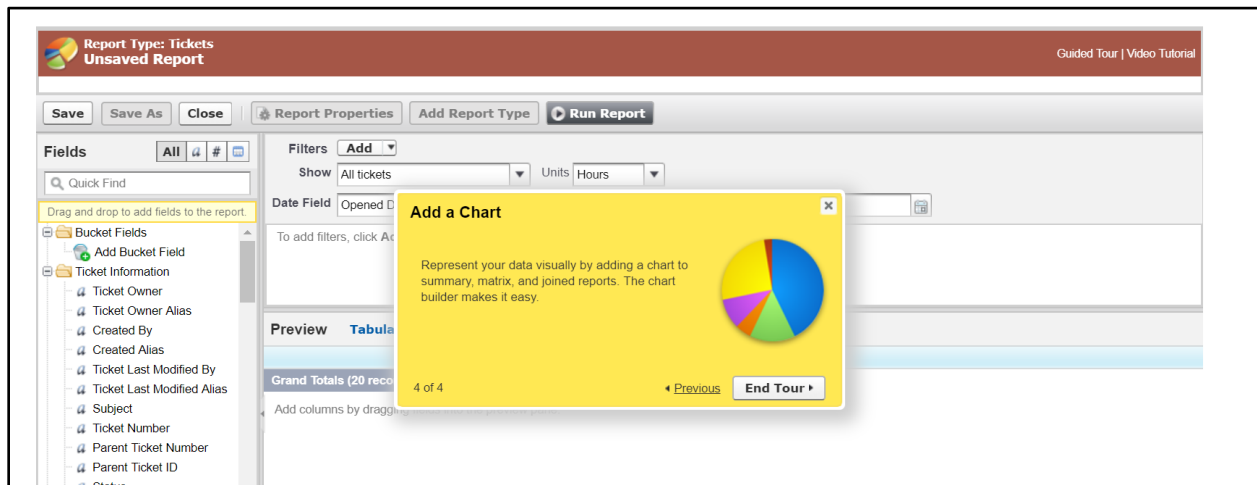
Figure 34: Add a Chart
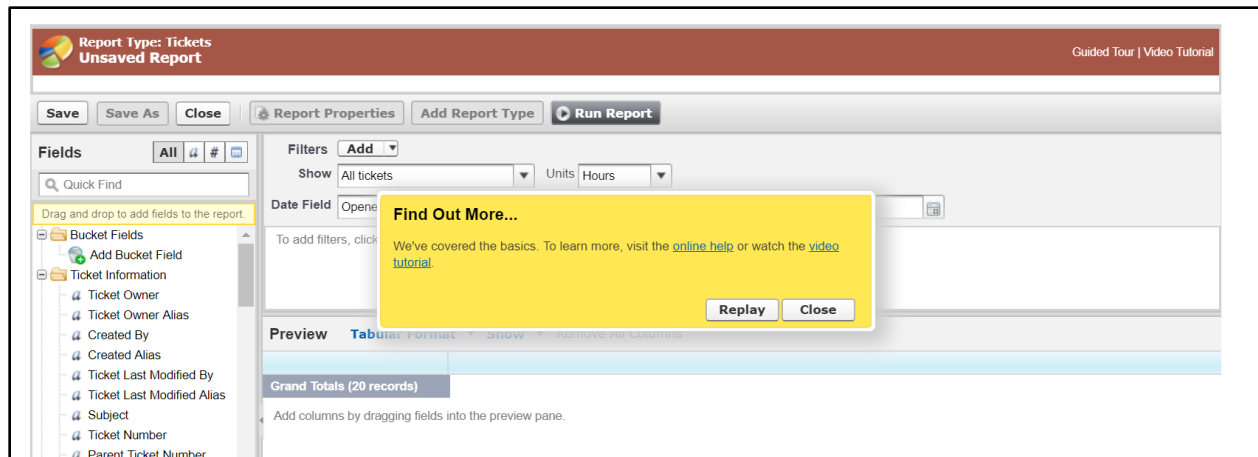
Figure 35: Additional Training Information
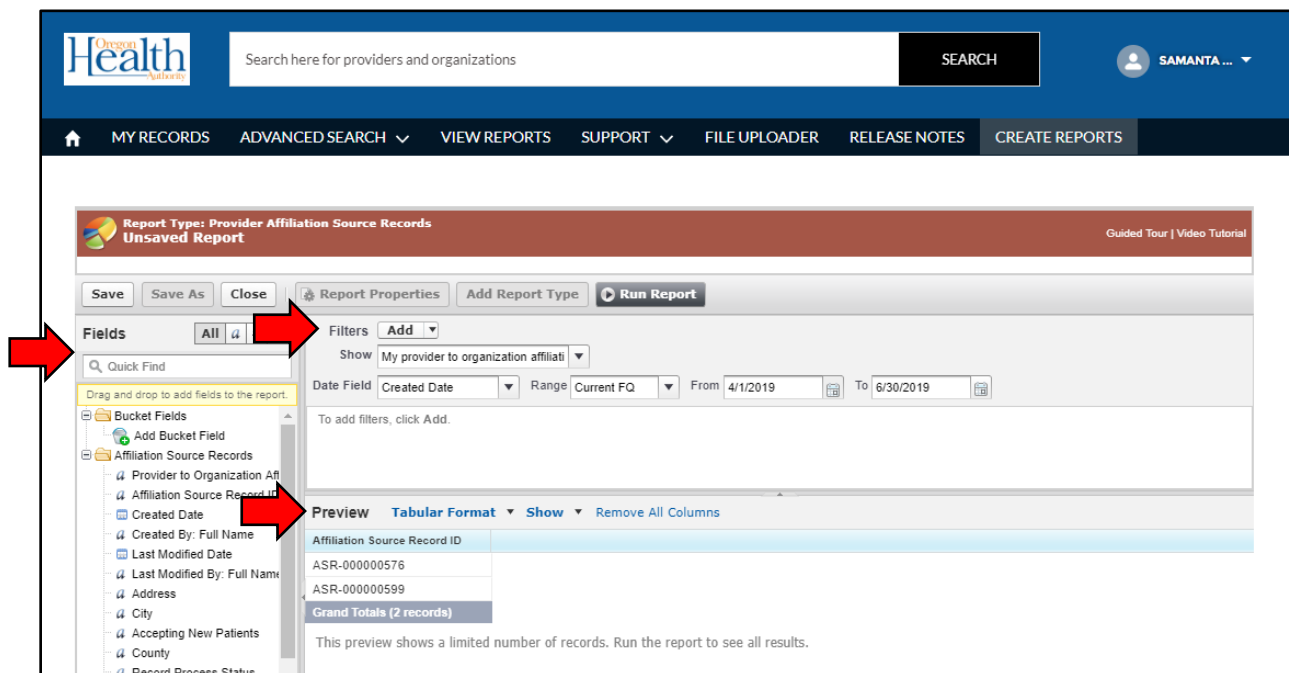
Figure 36: Salesforce Documentation on Report Building

- **Fields Pane (top left):** The Fields pane displays fields from the selected report type, organized by folder. Find the fields you want using the Quick Find search box and field type filters, then drag them into the Preview pane to add them to the report. Create, view, edit, and delete custom views and fields in the Fields pane as well. In the joined report format, the Fields pane displays fields from all report types added to the report, organized by report type.

- **Filters Pane (top middle):** Set the view, time frame, and custom filters to limit the data shown in the report.

- **Preview Pane (bottom middle):** The dynamic preview allows users to preview and further customize the report. Drag and drop items to add, reorder, and remove columns, summary fields, formulas, groupings, and blocks. Change the report format and display options or add a chart. The preview shows only a limited number of records. Run the report to see all your results.

To save a Custom Report, navigate to the 'Save' button on the top left (see Figure 37: Saving a Report).
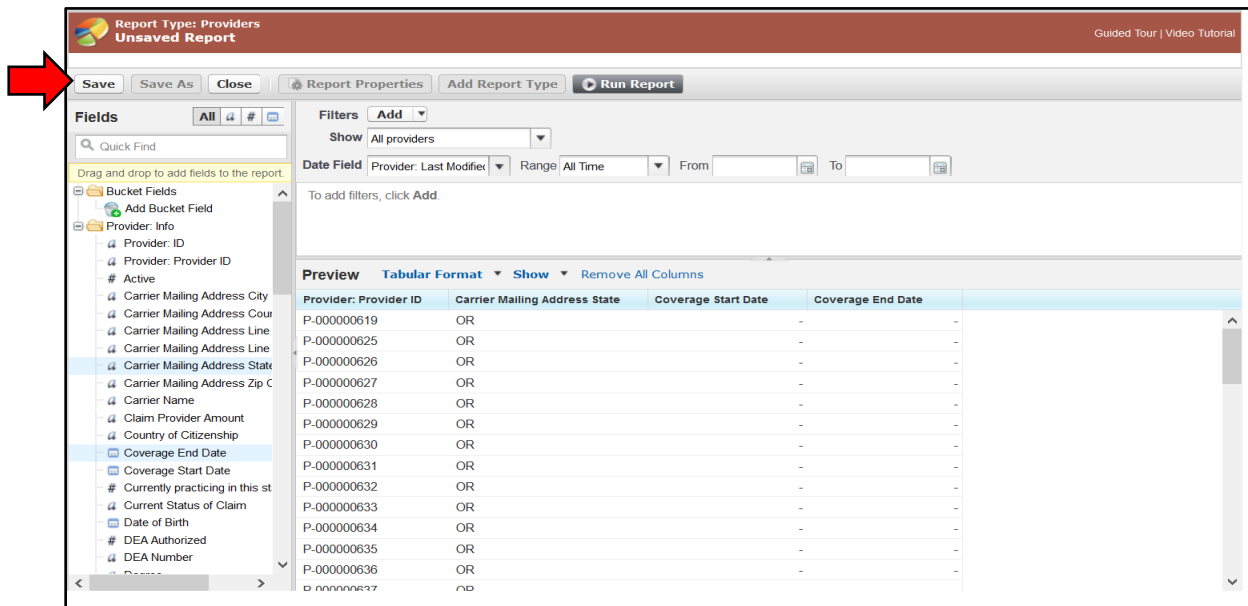
Figure 37: Saving a Report

After the 'Saved' button is clicked, the following window will appear (see Figure 38: Naming, Describing, and Assigning Report Folder).
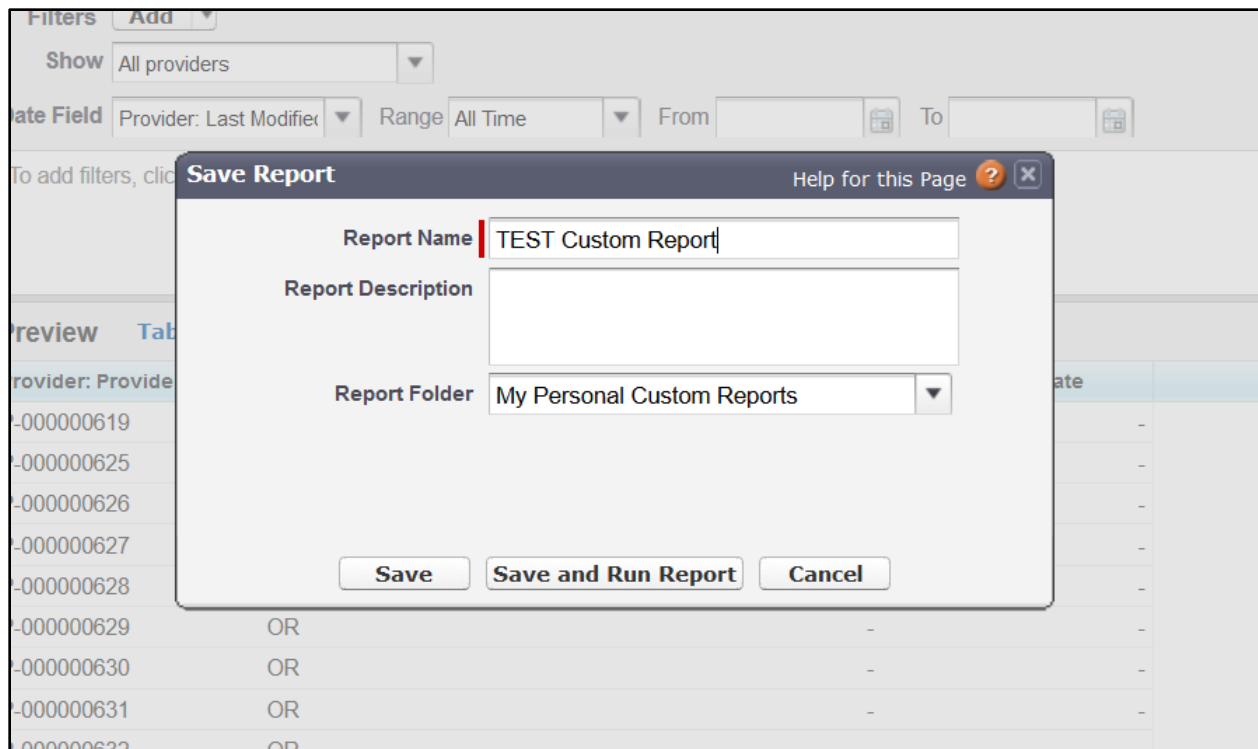
Figure 38: Naming, Describing, and Assigning Report Folder

Users can then add a Report Name, a Report Description, and assign the Report Folder in which they want the report to save. Once the required information is populated, the user will have to click the 'Save' button again.

The user will be automatically redirected back to the report. To ensure the report saved successfully, check that the name created for the report is displayed in the upper left corner (see Figure 39: TEST Custom Report).
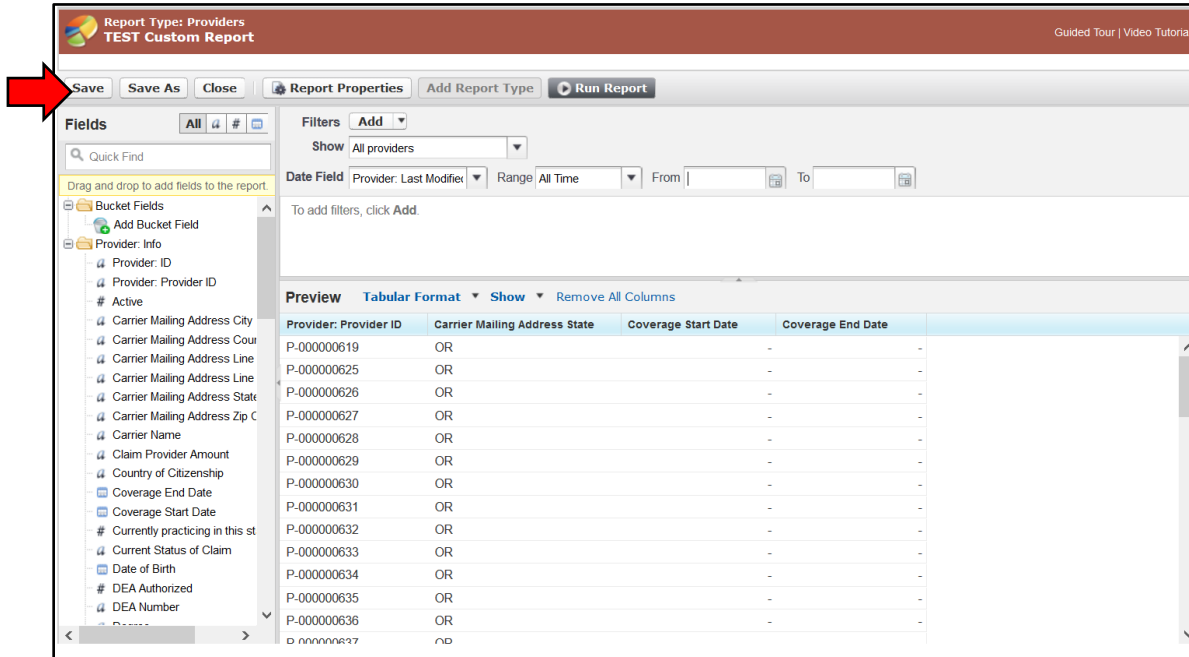
Figure 39: TEST Custom Report

To retrieve custom reports, users will navigate to the Report Builder and choose the folder in which they saved the report. In the example shown above, the user created the custom report: TEST Custom Report. TEST Custom report is saved and can be accessed the Report Folder: My Personal Customer Reports, as shown below (see Figure 40: Report Saved in Folder).
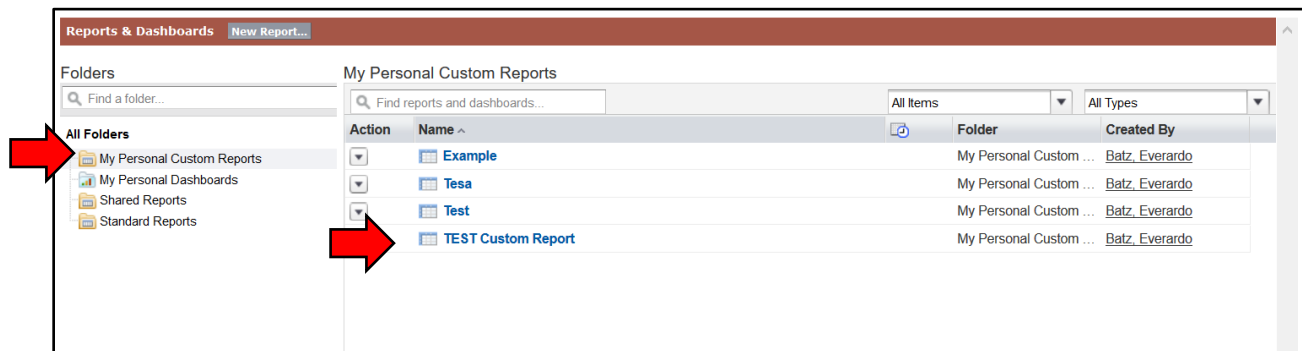
Figure 40: Report Saved in Folder

To share a custom report with other users, users can simply drag and drop the report to the Shared Reports folder, as shown below.
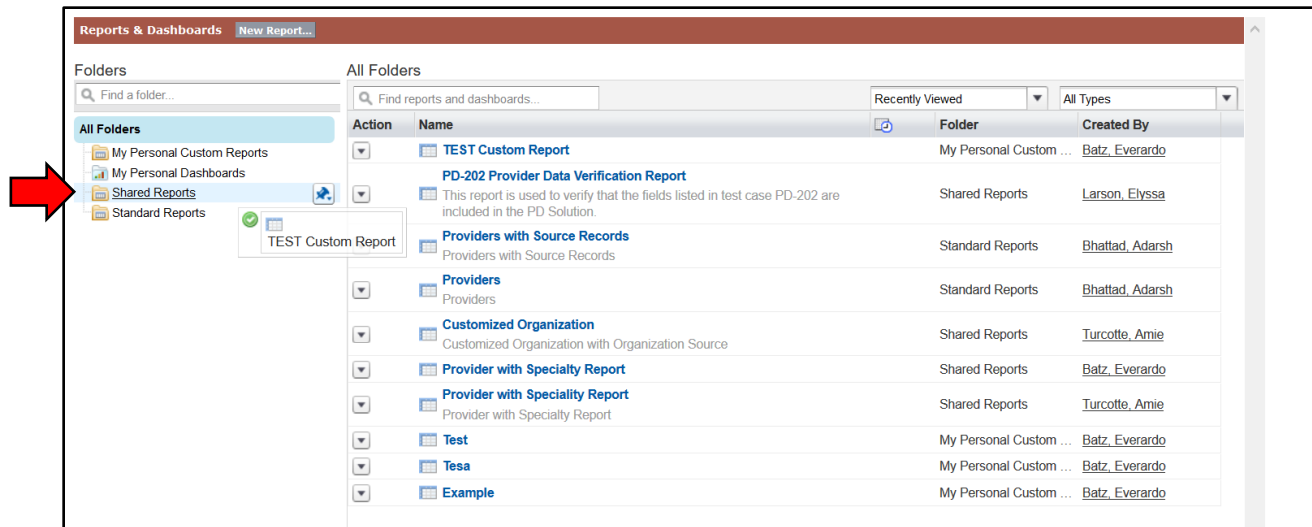
Figure 41: Drag and Drop to Shared Reports Folder

Users may contact the Provider Directory Help Desk if they need additional assistance in building reports.

2.5   LOADING DATA THROUGH THE FILE UPLOADER

The file uploader tool allows users to upload batch records. This is helpful when large numbers of providers or organizations need updated data or data attestations. Users will need to request additional permissions to upload files.

The 'File Uploaders' tab is located on the Home Page (See Figure 42: File Uploader Tab). Users may also use Secure File Transfer Protocol (SFTP), which is a network protocol for secure data transfer via a Secure Shell (SSH) data stream connection. SFTP is the most commonly used and most preferred method of transport for batch files. SFTP files will be loaded into Provider Directory using Informatica Extract, Transfer, & Load (ETL).

To submit data, users are required to utilize the OPD's data loading specification document. If a user does not have this document, they will need to submit a support ticket through the OPD Help Desk.

Once the OPD Help Desk receives the request for a batch data contributor, they will confirm approval with OHA. OHA will contact the batch data contributor to review the request. After OHA approves the request, the OPD Onboarding team will set up a meeting with the user to review the data specification document, load a test file into the Pre-prod environment, and work through any errors that may occur with the end user's data. Once this onboarding is completed, the user will be able to utilize File Uploader independently, provided they conform to the required data loading specification document.
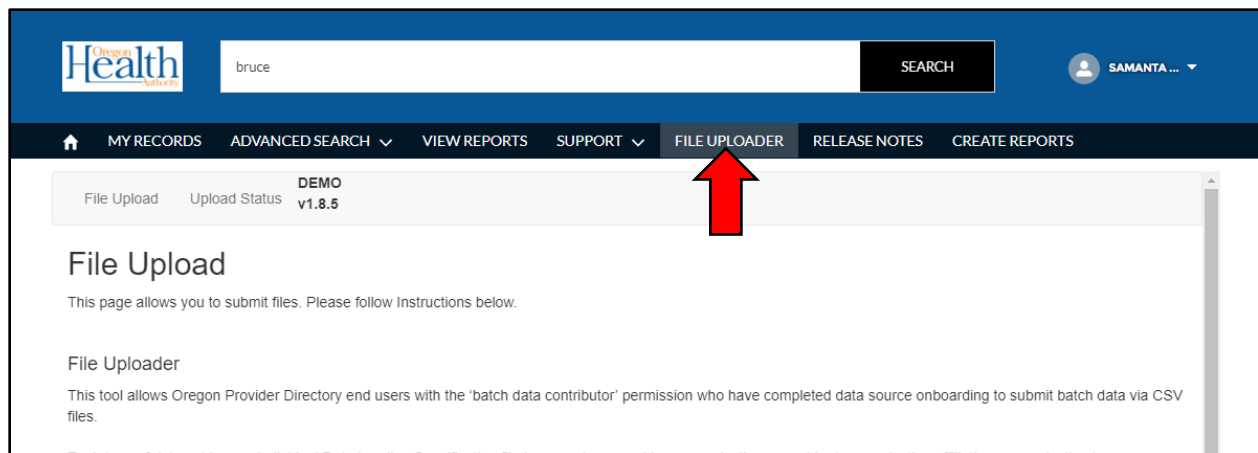
Figure 42: File Uploader Tab

To better understand the file upload process, the user must understand the necessary data loading specification in which new files should be submitted. The full data loading specification document is captured in section **Error! Reference source not found.**, and described in detail in the following figures and section.
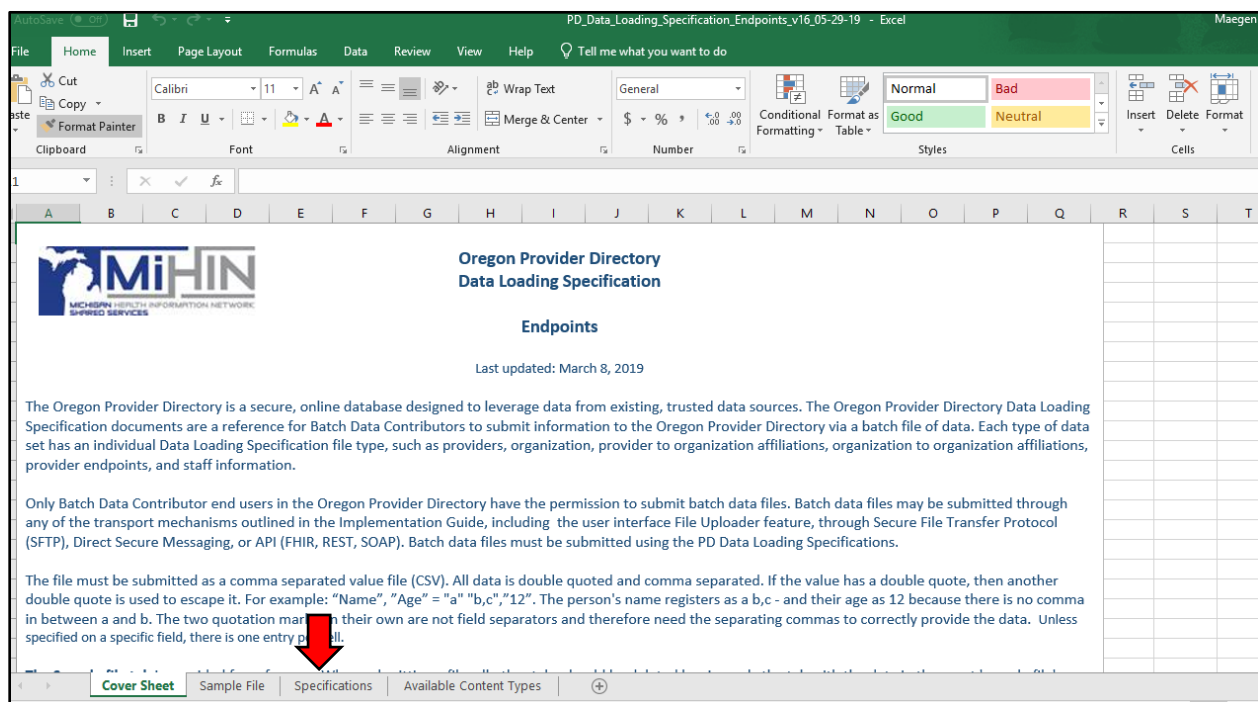
Figure 43: Data Loading Specification Cover Sheet

The data specification document initially displays a Cover Sheet, which provides further information about the file submission process for users to review). There are multiple data loading specifications including: Organizations, Providers, Provider to Organization Affiliations (relationship between provider and organization), and Organization to Organization Affiliations

(relationship between two different organizations). Each tab contains a list of various fields for which data can be populated by the data source and eventually updated within the OPD.
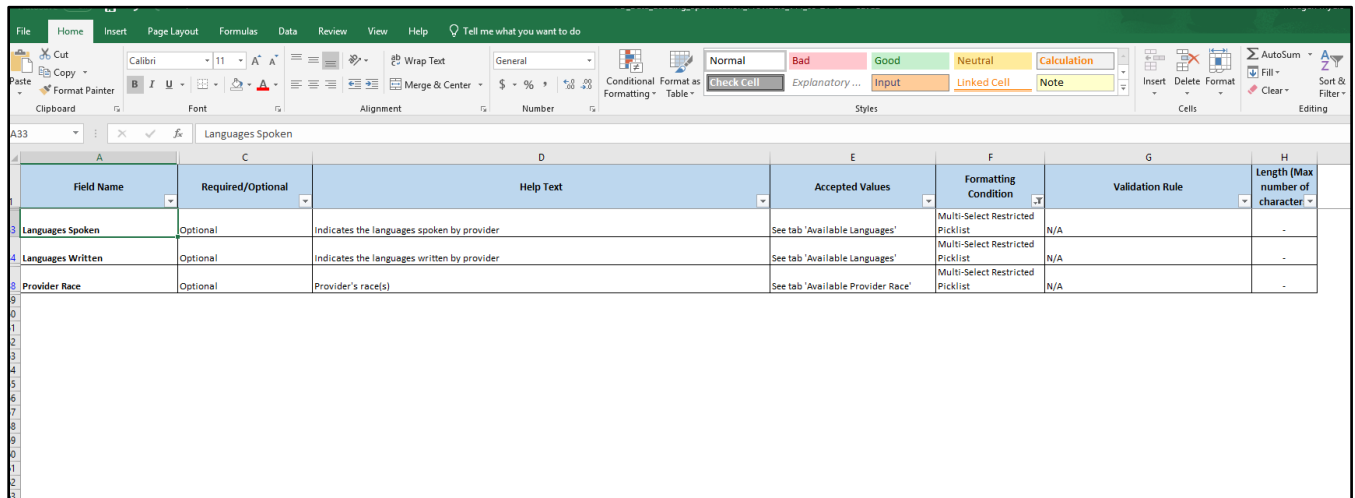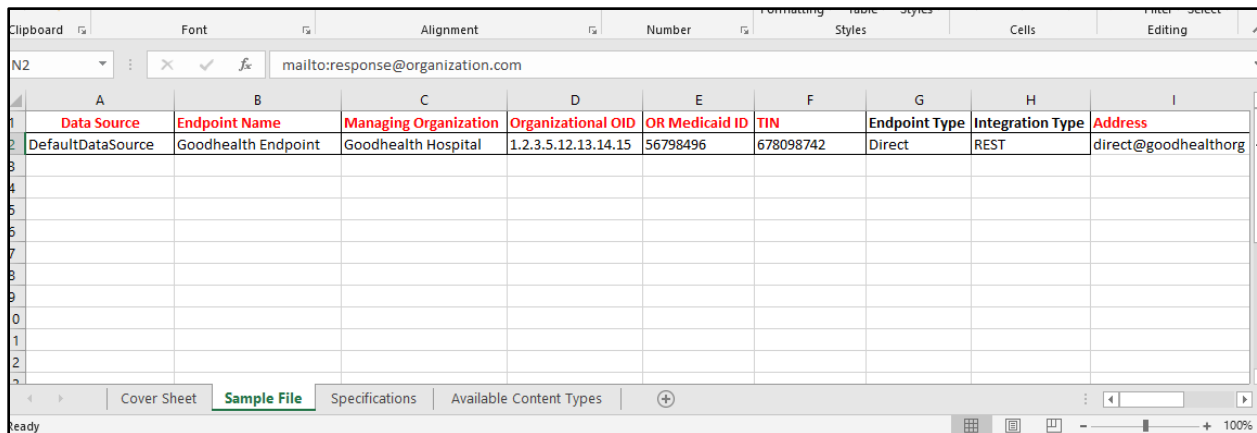
For example, when the Provider tab is selected, the user can view a long column which describes multiple fields and exactly how those fields need to be populated by the data source. While only required fields are needed for validation, providing additional data allows for a more robust provider directory.

Figure 44: Data Specifications- Providers Spec Tab

Figure 45: Data Specifications- Providers Sample Tab

Only Batch Data Contributor end users in the Oregon Provider Directory have the permission to submit batch data files. Batch data files may be submitted through any of the transport mechanisms outlined in the Implementation Guide, including the user interface File Uploader feature, through Secure File Transfer Protocol (SFTP), Direct Secure Messaging, or API (FHIR, REST, SOAP). Batch data files must be submitted using the PD Data Loading Specifications.

The file must be submitted as a comma separated value file (CSV). All data is double quoted, and comma separated. If the value has a double quote, then another double quote is used to escape it. For example: "Name"," Age" = "a""b,c",”12”. The person's name registers as a"b,c - and their age as 12 because there is no comma in between a and b. The two quotation marks on their own are not field separators and therefore need the separating commas to correctly provide the data. Unless specified on a specific field, there is one entry per cell.

The Sample file tab is provided for reference. When submitting a file, all other tabs should be deleted leaving only the tab with the data in the exact 'sample file' format.

The Spec tab describes the specifications for each possible data element. Unless specified on a specific field, there is one entry per cell.

- Field Name: This is the label displayed in the PD user interface for that data element.

- Field API Name: This is a hidden column that should be un-altered. It is used for internal mapping.

- Required/Optional: This indicates whether that specific field is required or not. If the field is required, the file must include a data entry for that column on each row line item. If the required fields are not populated, then the file will be rejected, and no data will be submitted.

- Help Text: This is the help text that displays on the field in the user interface.

- Example/ Accepted Values: This column describes an example of the data element, and/or the accepted values for that field.

- Formatting condition: This describes the exact formatting required for that field's data element being submitted.

- Validation Rule: This describes the necessary data element format for validation requirements. If the validation requirement is not met, the file will be rejected.

- Length (Max number of characters): This displays the maximum quantity of characters allowed within the field.

Other tabs may be included in some Data Loading Specifications to denote the specific accepted values for fields with lists.

	Field Name	Required/Optional	Help Text	Accepted Values	Formatting Condition	Validation Rule	Length (M number character
14				Provider Identifiers			
15	NPI	Required - Pick one or more identifiers per Organization. Enter the ID with the corresponding identifier field. At least one identifier must be populated.	National Provider Identifier: number of provider NPI		Free Text	1. NPI must be 10 digits 2. NPI needs to be in numeric format with no special characters	10
16	OR Medicaid ID		Provider's Medicaid ID Number in Oregon.		Free Text	1. OR Medicaid ID must be in numeric format without any special characters. 2. OR Medicaid ID Must be between 6 and 9 Characters	9
17	Medicare Number	Optional	Medicare number of provider		Free Text		20
18				Contact Information			
19	Phone	Optional	Phone number for a provider		Phone	Phone number needs to be in a 10 digit numeric format with no special	10
20	Email	Optional	Email address		Email Formatted	Email address needs to be in an email format.	-
21	Mobile	Optional	Mobile number of provider		Phone	Mobile number needs to be in a 10 digit numeric format with no special	10
22	Fax	Optional	Fax number		Phone	Fax number needs to be in a 10 digit numeric format with no special	10
23				Provider Type and Specialty			
24	Primary Specialty	Optional	Provider's primary specialty	See tab 'Available Specialties'	Lookup - Restricted to Accepted Values		-
25	Secondary Specialty	Optional	Provider's secondary specialty	See tab 'Available Specialties'	Lookup - Restricted to Accepted Values		-
26	OR Medicaid Provider Type	Optional	Indicates the Oregon Medicaid provider type.		Free Text		255
27	Are you subject to 42 CFR Part 2?	Optional	Indicates if provider is subject to 42 CFR Part 2.	Yes, No	Restricted Picklist		-
28	Medicare Opt Out	Optional	Indicates if provider has opted out of Medicare	Yes, No	Restricted Picklist		-
29	Supervising Physician	Optional	If provider has a supervising physician, the name of the supervising		Free Text		100
30	Philosophy of Care	Optional	Provider Philosophy of Care which is an extension of a provider's specialty and can describe specifics about a provider including areas		Free Text		32768
31	Primary Care Provider Designation	Optional	Indicates if the provider is a primary care provider	Yes, No	Restricted Picklist		-
32				Provider Demographics			

Cover Sheet | Sample File | **Specifications** | Available Languages | Available Specialties | Available Provider Race | Available States | Available Licen ...

Figure 46: Data Specification- Validation Rules

Files must be saved in Common Separated Value (.csv), format rather than Excel (.xlsx), to ensure successful upload.

Additionally, adding details within the description field for the file is recommended for internal tracking. These steps will ensure there is no confusion during audits or in audit reports.

The interface allows users to drag and drop the file or click '+ Add files' to upload the file.
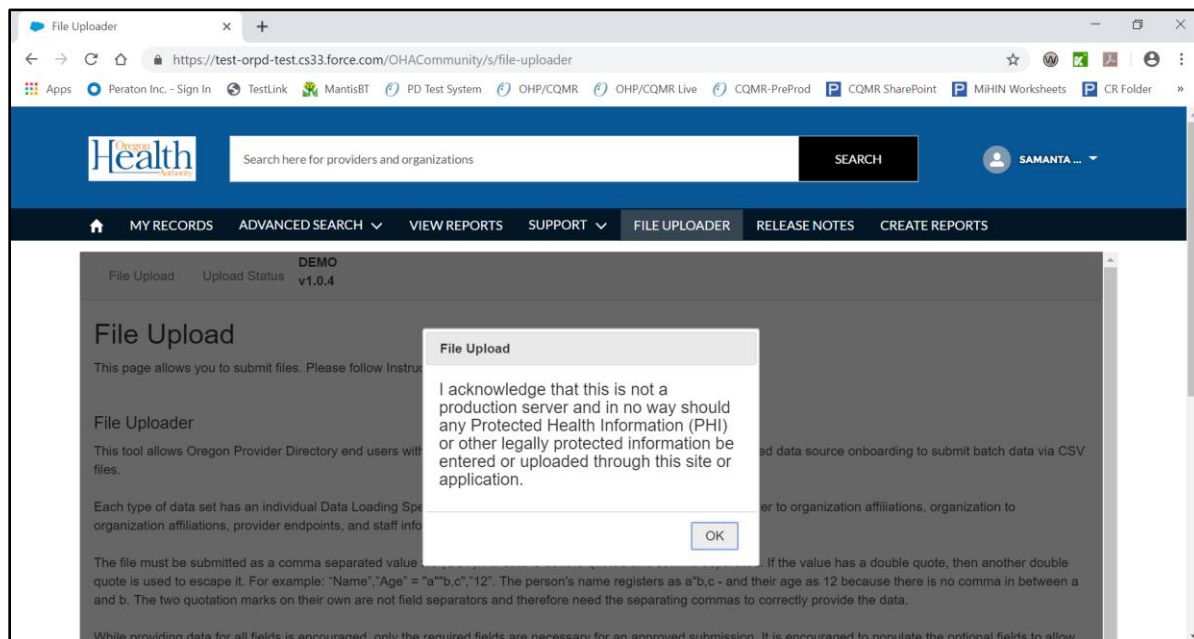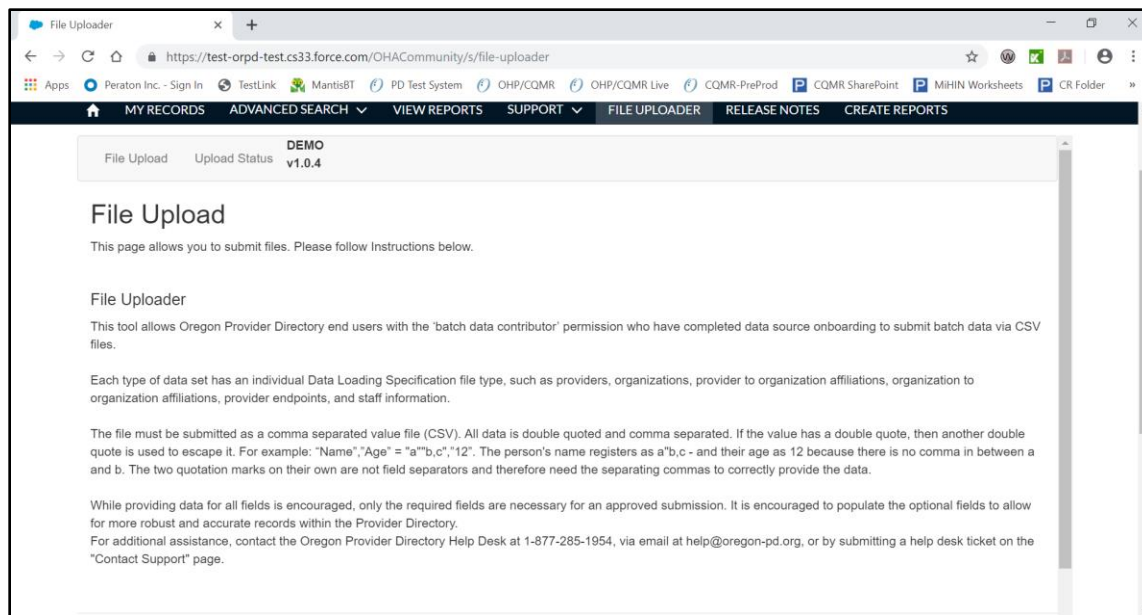

Figure 47: File Uploader PHI Acknowledgement
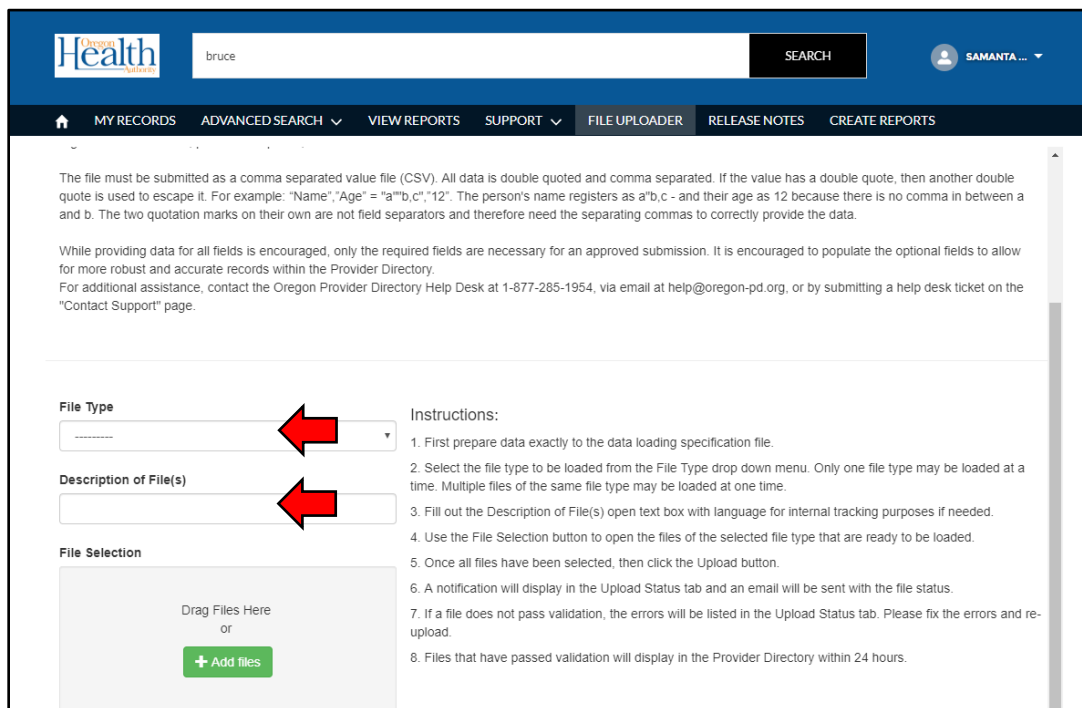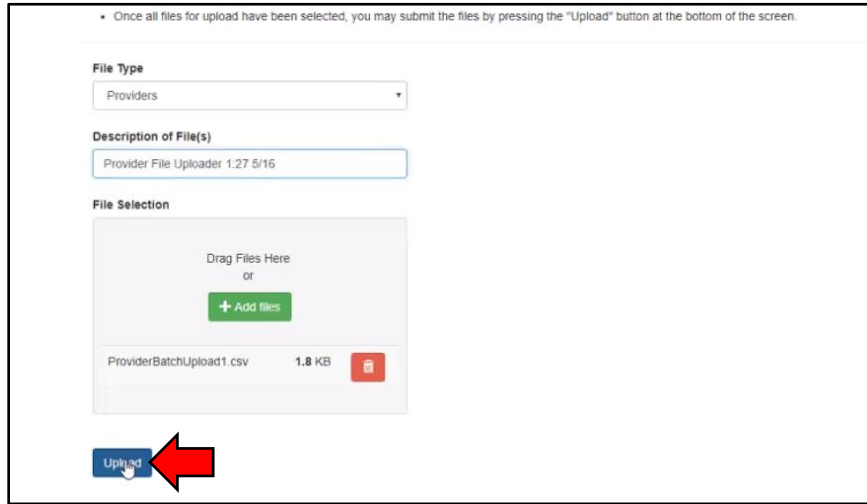
Figure 48: File Uploader Instructions

Figure 49: File Upload Submission Page

Once a file is chosen to upload, the user must specify the file type (in this example – Providers) to ensure the new data is populated into the correct place within the OPD. If the user plans to upload multiple files over time, the user can also add a description with the version number or date to help for future references.

Once all the information is completed and the file attached, select the 'Upload' button, as shown in Figure 50: File Uploader Final Step.
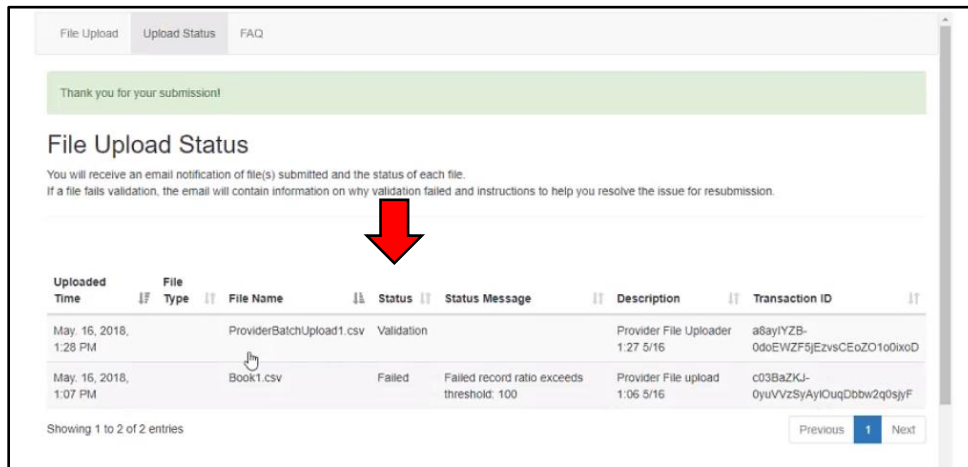
Figure 50: File Uploader Final Step

Once the file finishes uploading, the following screen will open, detailing the file upload status and showing a list of files that have been previously uploaded along with their status. Additionally, after a user uploads a record the user will receive an email notifying them if upload was successful or if it failed.
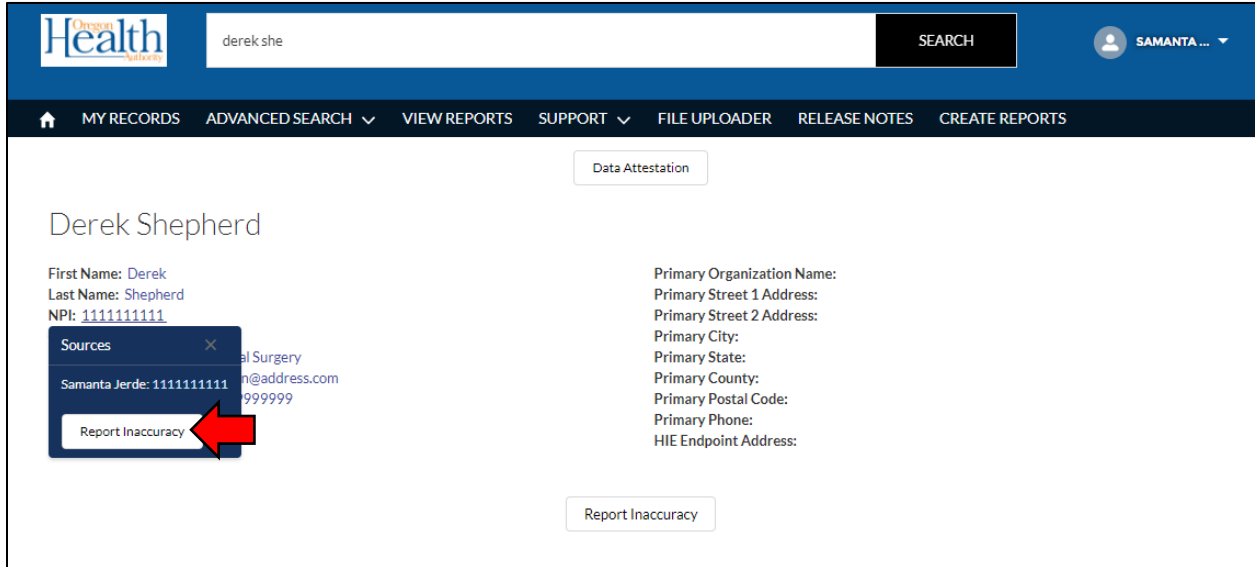

Figure 51: File Uploader Status

2.6   REPORTING AN INACCURACY

A user can report an inaccuracy on any record if the user believes the information displayed is not accurate. After navigating to a record, users can click on any of the data fields in the top card presented or the 'Report Inaccuracy' button on the Master Record. The image in Figure 52 shows the data source drill down displayed when selecting a field within the master record. From this
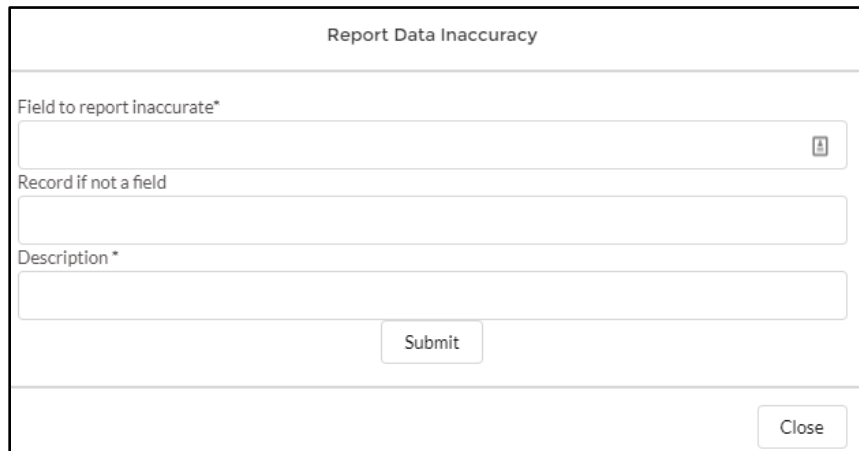
view, the user may select the button, "Report Inaccuracy" to report the data for further data stewardship evaluation. When an inaccuracy is reported by an OPD end user, this action will add a gray flag to the field display to alert other users that the data is being evaluated for accuracy. If an inaccuracy is reported by an OHA Administrator or OPD data steward, the field will be marked with a red flag.

Figure 52: Report Inaccuracy

For example, if the Provider License Number was incorrect, the user would click the 'Report Inaccuracy' button as shown (see Figure 52: Report Inaccuracy) would be presented.

Figure 53: Report Data Inaccuracy Form

On this form, the user can once again confirm the inaccurate field and provide an explanation of the incorrect data as well as a recommendation of how it should be corrected.

The user clicks the 'Submit' button to process the ticket, or the 'Close' button to exit the form. Users can also click the 'X' in the top right to cancel the request.

Reported inaccuracies will then be evaluated and addressed by data stewards.

Source Records are automatically rolled up to update the Master Record. Any data changes or updates made to inaccurate data by data stewards will be reflected in the Master Record at this time.

2.7   REQUESTING ADDITIONAL PERMISSIONS

OPD access is granted by OneHealthPort, and permission sets are assigned within the OPD based on the OneHealthPort role. The PD roles are mapped to OneHealthPort roles and OHA functions.

The basic end user role has permission sets that include basic view rights, basic data contributor, and access standard reports. This is the standard role and a pre-requisite for all other roles. The basic end user role allows the end user to create tickets; view, create and edit organization and provider data; and view reports. The OneHealthPort roles that are associated to these basic end user permissions are depicted in Table 1: OneHealthPort Roles for Standard Users within Provider Directory.

Through the OPD user interface, users may request additional permissions in addition to their standard role permissions such as API access, create reports, batch data contributor and escalated trust preference for specific records within the OPD solution. All requests for elevated permissions will be handled via the Help Desk ticketing system. OHA establishes the criteria to approve these requests.

Users submit their requests through the OPD. Requests are then approved based on criteria defined by OHA. Though requests are always reviewed using OHA's criteria, OHA's direct involvement is not necessary in all cases.

Help Desk tickets are addressed in the order received and prioritized depending on tier and severity level from Monday to Friday, 8:00am-5:00pm PST per the Help Desk Plan.

Examples of additional permission sets that may be requested include:

- Batch Data Contributor user who can use file uploader and/or load batch files with any of the PD transport mechanisms

- Organization Representative user who has higher trust when attesting to data for specific organization records

- Provider Clerk user who has higher trust when attesting to data for specific provider records

- Create Reports user who can access Report Builder and create custom reports

- View API access to set up a machine user to access PD data and reports

    o See the OPD Implementation Guide for further instructions regarding REST and SOAP API connections.

To submit a 'Request Additional Permissions' ticket, navigate from the Home Screen to the drop-down menu that appears under your name and select the "My Profile' tab and the following page should appear.

Figure 54: Request Additional Permissions

On the bottom left hand corner of the page there will be a "Request Additional Permissions" button. After selecting this button, a form will appear to enter required information (see Figure 55: Request Additional Permissions Ticket Form).
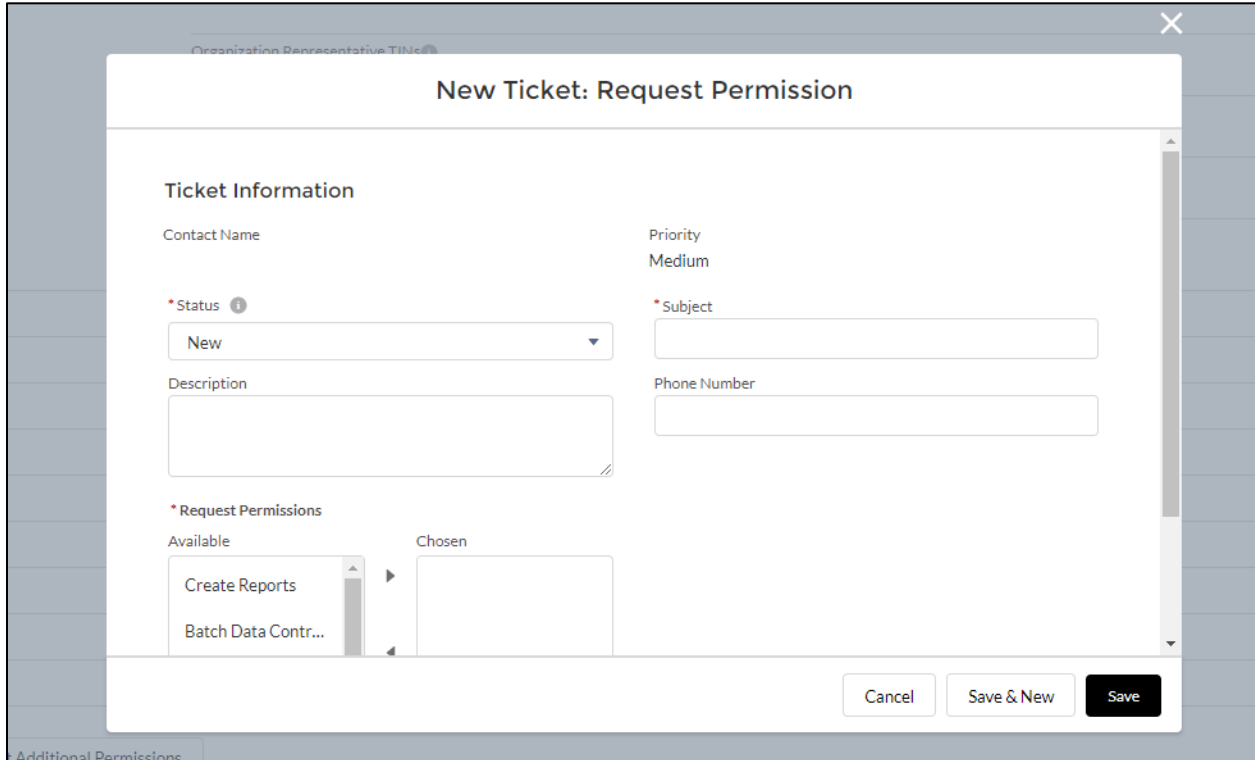

Figure 55: Request Additional Permissions Ticket Form

From this page, users can complete the form. Only the fields highlighted by a red asterisk are required. The required fields include the Status, Request Permissions and Reason for Request.

To choose multiple permission sets to request, click on one permission set, then hold down the CTRL key while choosing additional permissions.

Click 'Save' to submit the ticket.

Once the Help Desk receives a ticket requesting additional permissions, the Help Desk follows the approved OHA decision tree process to determine if the end user is approved or denied the additional permission set. Once the changes have been implemented, the Help Desk closes the ticket, and an email will be sent to the requesting user to inform them that the additional permission request has been approved and that their permissions have been updated accordingly.

2.8 UNDERSTANDING DATA SOURCE CONTRIBUTION AND RECORD SCORING

The OPD is a compilation of data records from multiple sources who may be reporting on the same providers and organizations. Because data from various sources may conflict, trust preferences established by OHA are used to select prevailing data for the Master Record.

Trust preferences identify which data sources are most reliable on a per field basis based on the data contributor. In addition to identifying trustworthy data by field, source records are scored based on conformance to OHA business rules.

Above all other users, OPD data stewards maintain the highest level of trust. Any source record that they edit will be considered the highest record. If two users have the same escalated trust preferences, they will be trusted the same, and whatever data is most recent between them will roll up to the master record.

The Master Record displays the reliability score. Source records display both the reliability score and the completeness score. Record scores are available for users to view and are used for data stewardship.
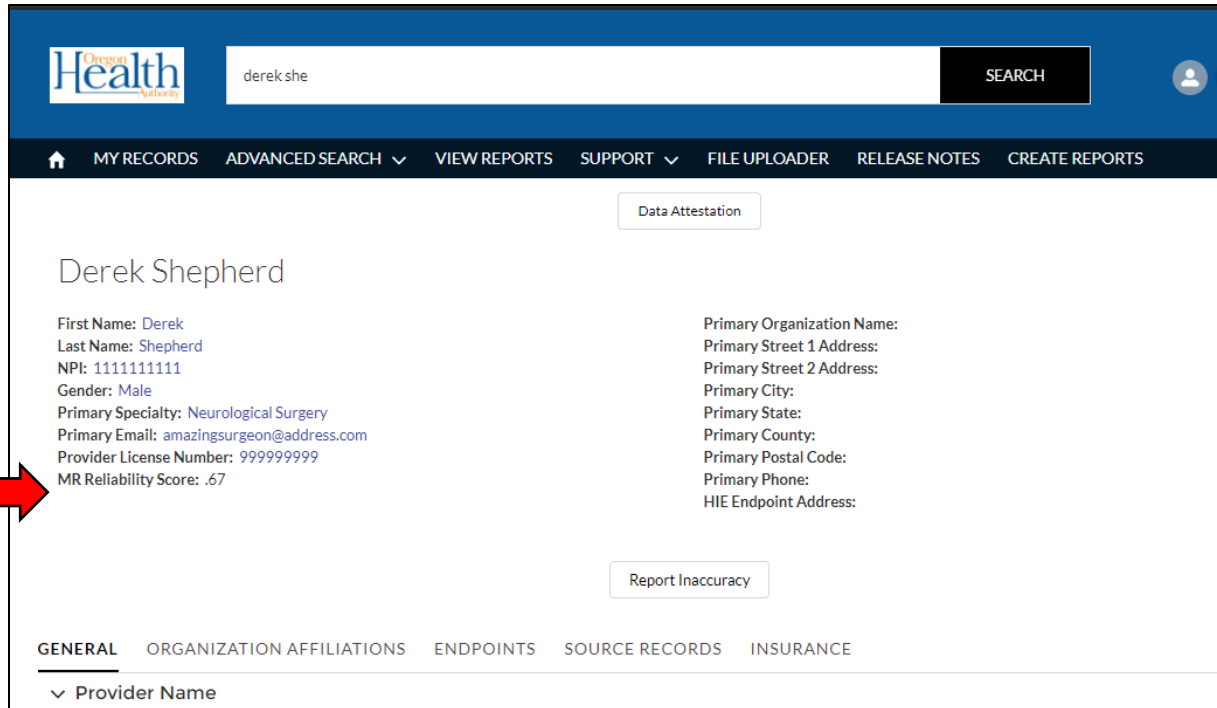
2.8.1 Completeness Score

The completeness score is only displayed on the source records of providers and organizations. The score is calculated based on a percentage of fields populated that OHA has identified per data source divided by the total number of fields that the data source has potential to provide. This score calculates the fields that are populated along with the importance of the populated field.

2.8.2 Reliability Score

The reliability score is displayed on source records and master records of providers and organizations. A series of algorithms and calculations generate the reliability score to provide a rating based on the decay rate of data elements, trust preferences by fields by data source, level of agreement with other data sources and business rules defined by OHA.

The algorithm compares multiple source records from contributing data sources and rolls up data per field to the single "Master" record for providers and organizations. The data is parsed, selected, and scored based on the most trusted data source on the specific record in the OPD.

Figure 56: Provider Master Record

Figure 57: Source Records Tab on Organization Master Record

To view the individual Source Records from which the Master Record was created, a user can navigate to the 'Sources Records' tab (see Figure 58: My Source Records).

2.9   UTILIZING 'MY RECORDS' TAB

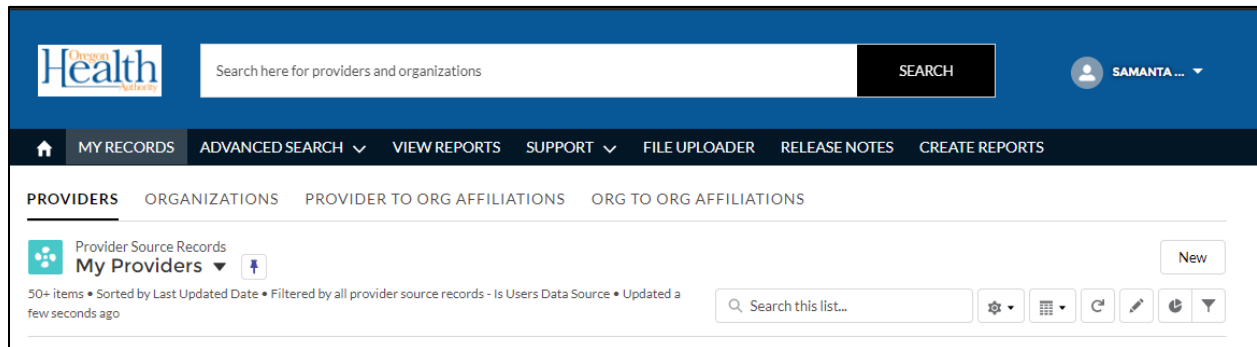The following page opens once users navigate to the 'My Records' tab from the Home Page.

Figure 58: My Source Records

The My Records tab will show all the Source Records for which the user is the Data Source. There are various subsections to view specific Source Records, including Providers, Organizations, Affiliations and Organization Affiliations.

Any individual Source Record can be opened by clicking on the word "view" of the record of their choice, displayed under the first (left) column. When selected, the record will open as follows:
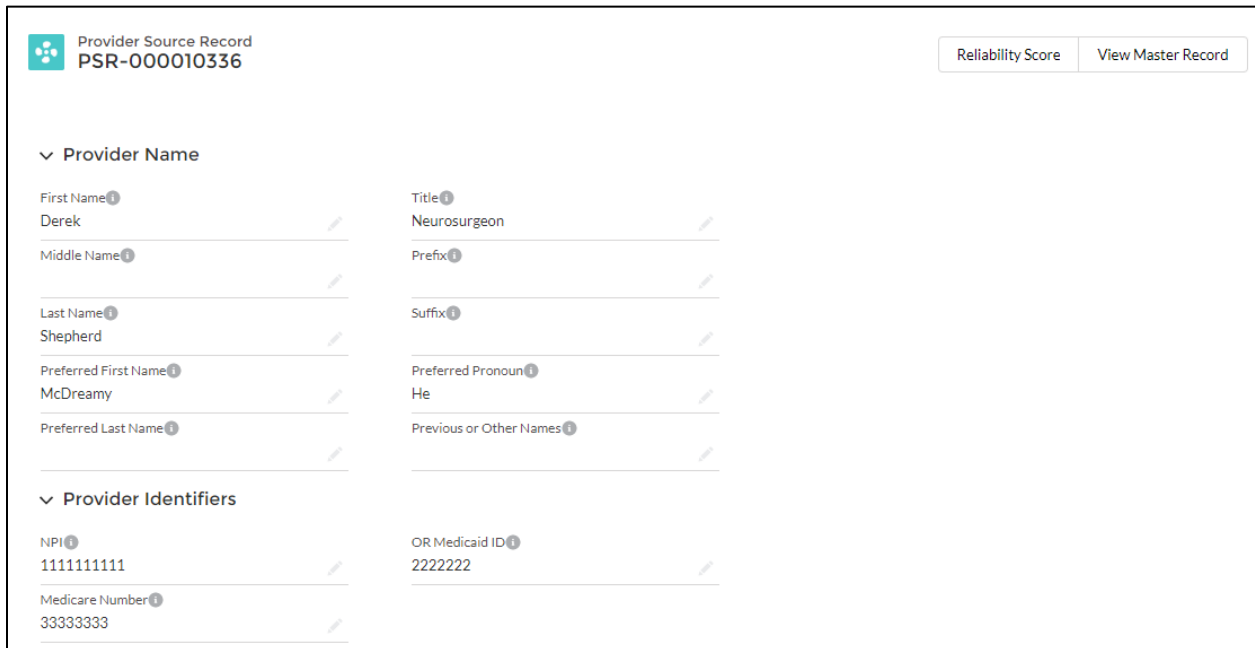
Figure 59: My Records – Full Provider Source Records

Under the 'Details' Section, the individual Source Record provides more information for that record. Some of these details include: Provider Name, Provider Identifiers, Contact Information, Provider Type and Specialty, Provider Demographics, Licenses, Education – Degree(s), and system fields.

From the 'My Records' main tab (see Figure 59: My Records – Full Provider Source Records), the user is also able to add new Source Records by clicking the 'New' button on the top right side of the page. Once the button is clicked, the following page will open.
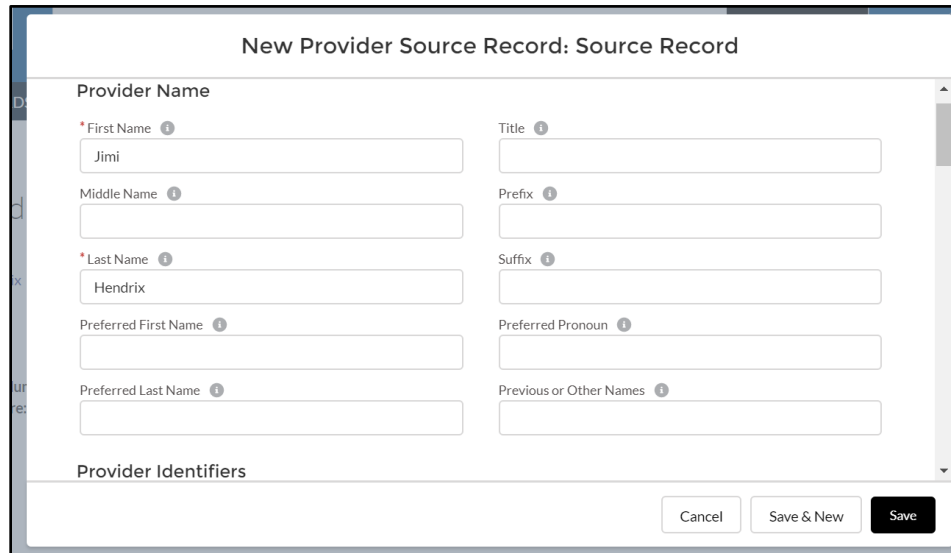
Figure 60: New Provider Source Record Form
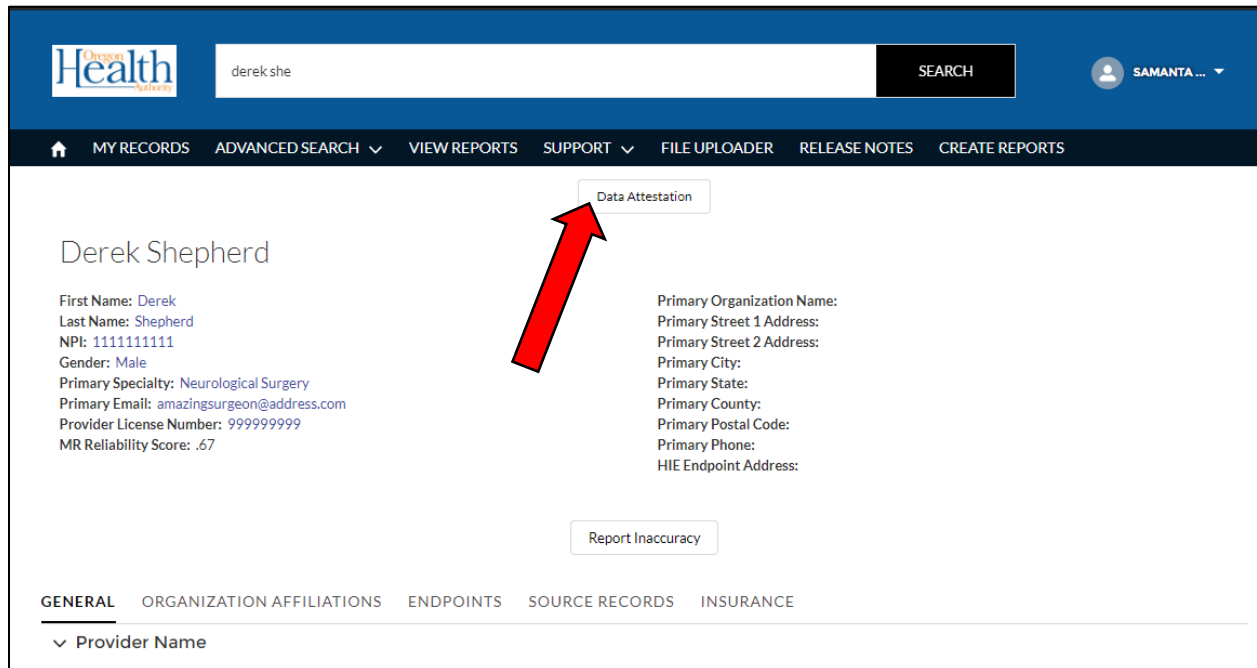
Required fields are marked by a red asterisk and must be completed for the record to be saved in the system. Click "Save" to save the record.

Alternatively, the user may create a new Source Record by navigating to either the Providers or Organizations tab and selecting a specific record to perform data attestation (see section 2.10).

2.10   USE OF DATA ATTESTATION BUTTONS

Data Attestation buttons can be found within Master Records throughout the OPD (examples: Provider, Provider Affiliation, Organization, Organization Affiliation).
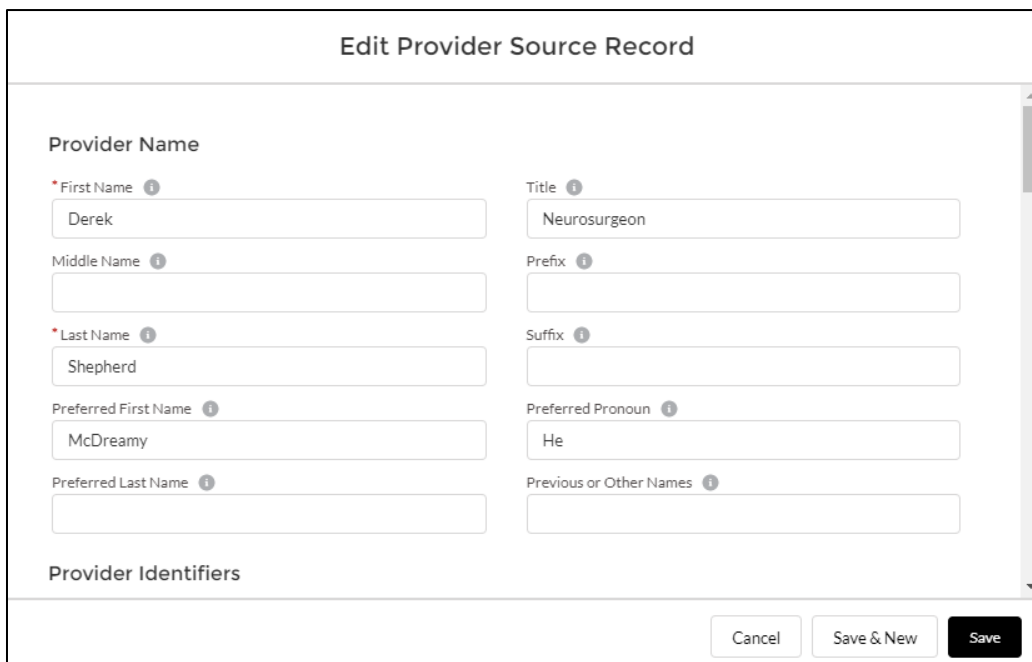
Within any record, the Data Attestation button can be utilized as an additional way for a new directory record to be created.

Figure 61: Data Attestation

Clicking "Data Attestation" will open the following window. Required fields are marked by a red asterisk and must be completed for the record to be saved in the system.

Figure 62: Provider Source Record Form

Click "Save" to save the record. This is an alternate method of creating a Source Record.

3.0 CONTINUOUS IMPROVEMENT

The following sections capture methods to improve the operations and user experience of the Oregon Provider Directory services.

3.1 HELP DESK TICKETS

Help Desk support is available for OPD users' questions and concerns. Selecting the 'Support' button on the main header navigates to the Help Desk contact page.
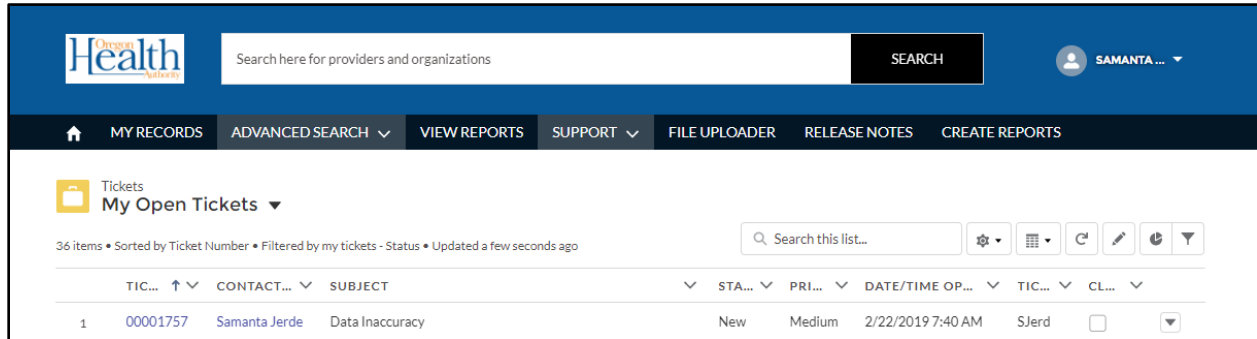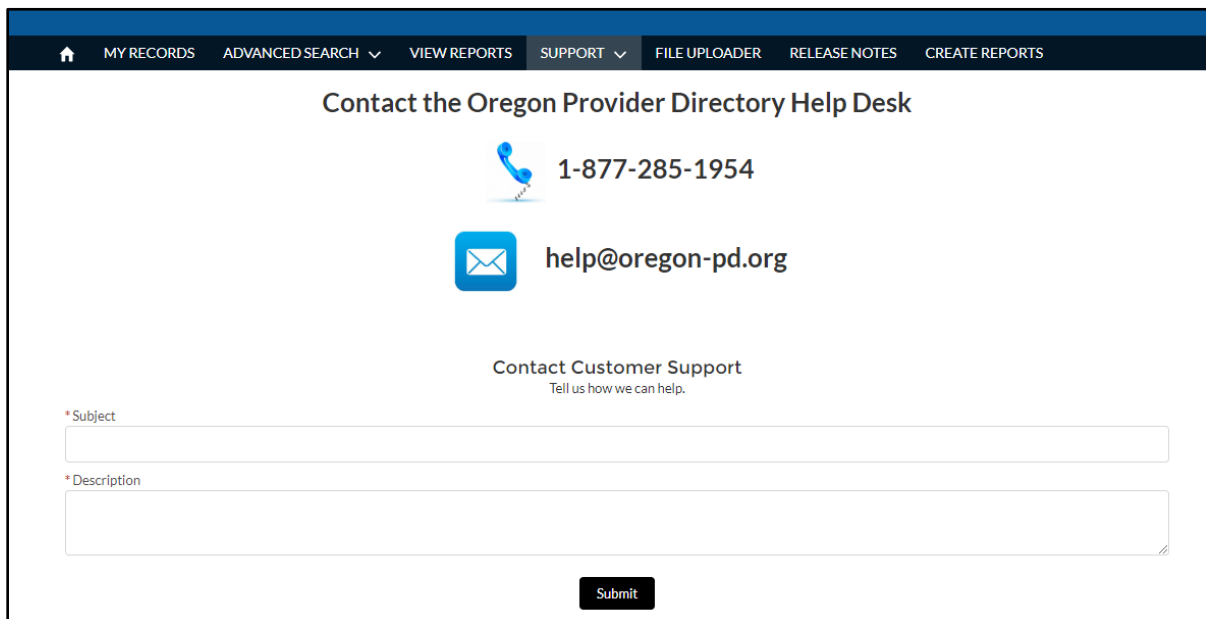

Figure 63: My Open Tickets

From this page, users can view all their tickets. There are two ways to create a new ticket. The first way is to click the drop down on the Support tab, then click contact support. This will generate a ticket after you type in the required fields: subject and description (see Figure 64: Submit a Ticket Through the Help Desk). The second process to submit a ticket is to request additional permissions (refer to section 2.7 for more information).

Figure 64: Submit a Ticket Through the Help Desk