<u>How to upload batch taxonomies and licenses</u>

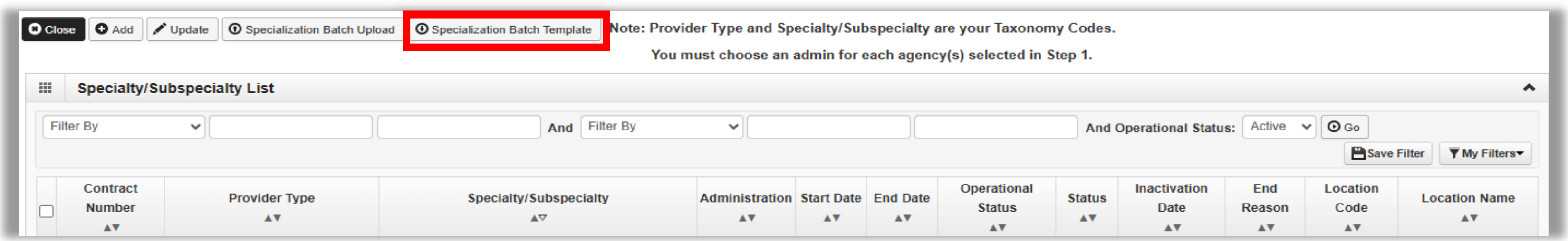
<u>Important before getting started:</u>

- You will need to be able to log into ProviderOne using an EXT Provider Super User or EXT Provider File Maintenance profile.
- You will need to know the taxonomy numbers and what start date for those services.
  - The start date cannot be before the ProviderOne domain's enrollment effective date.
- You will need the license/certification number and the start and end dates.
- There needs to be at least one taxonomy per location in ProviderOne.
  - Note: For existing providers we have entered a place holder taxonomy of 19991TEMPL   STATE STAFF USE ONLY.

<u>Taxonomies:</u>

To submit multiple taxonomies for review at once, log into ProviderOne and click on the Link "Manage Provider Information".

Click on the blue Specialization step link and click on the Specialization Batch Template button. This excel spreadsheet will download to your computer.



Fill out every column.

A. **ProviderOne ID –** Enter the ProviderOne ID (domain).
B. **Facility NPI –** Enter the NPI of the ProvderOne ID (domain) these taxonomies will be for.
C. **Location Code –** Select the location code these taxonomies will be provided at. Each location added in ProviderOne is assigned a location code. To see all location codes, go to step 2 Locations.
D. **Agency –** Select an agency from the drop down that is approved on the domain.

E. **Administration –** Select corresponding administration with column D.

   a. **Note:** If HCA is selected in column D, HRSA will need to be the administration in column E.

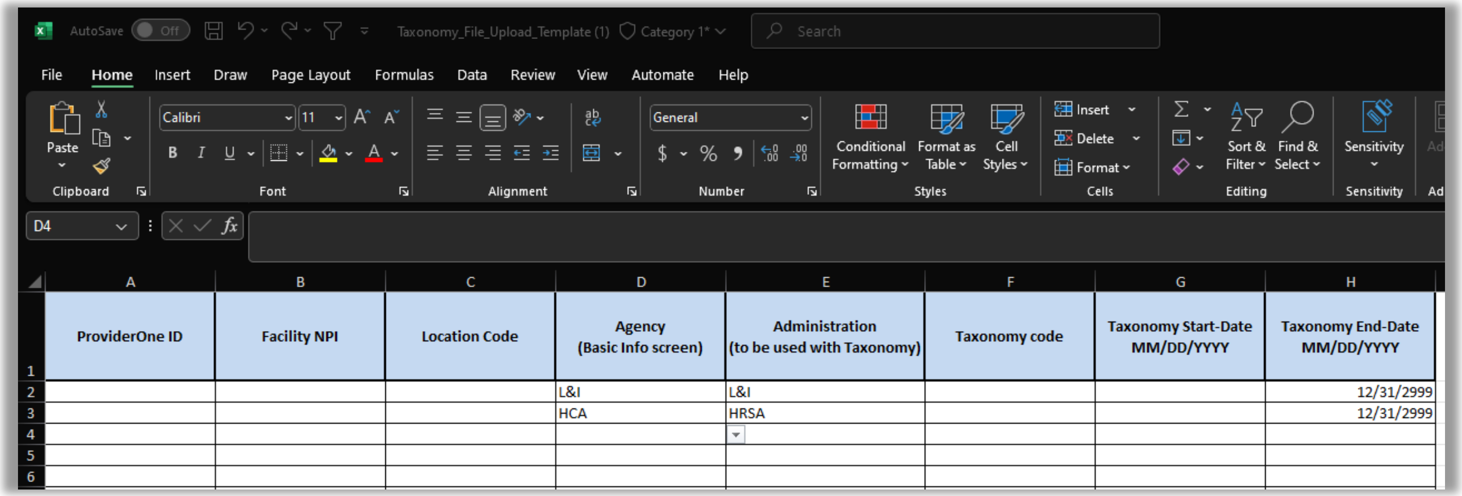
F. **Taxonomy Code –** Enter the full taxonomy number. Should have a total of ten characters (numbers and letters).

G. **Taxonomy start date -** All dates entered on the spreadsheet must be formatted as: mm/dd/yyyy. The taxonomy start date cannot be before the provider enrollment date. The taxonomy date cannot before the location start date.

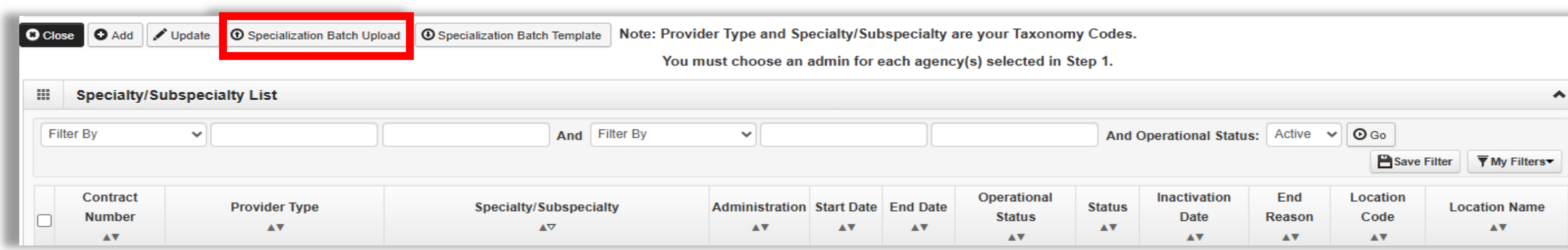
H. **Taxonomy end date –** All dates entered on the spreadsheet must be formatted as: mm/dd/yyyy.

   a. **Note:** For active taxonomies the end date should be 12/31/2999.

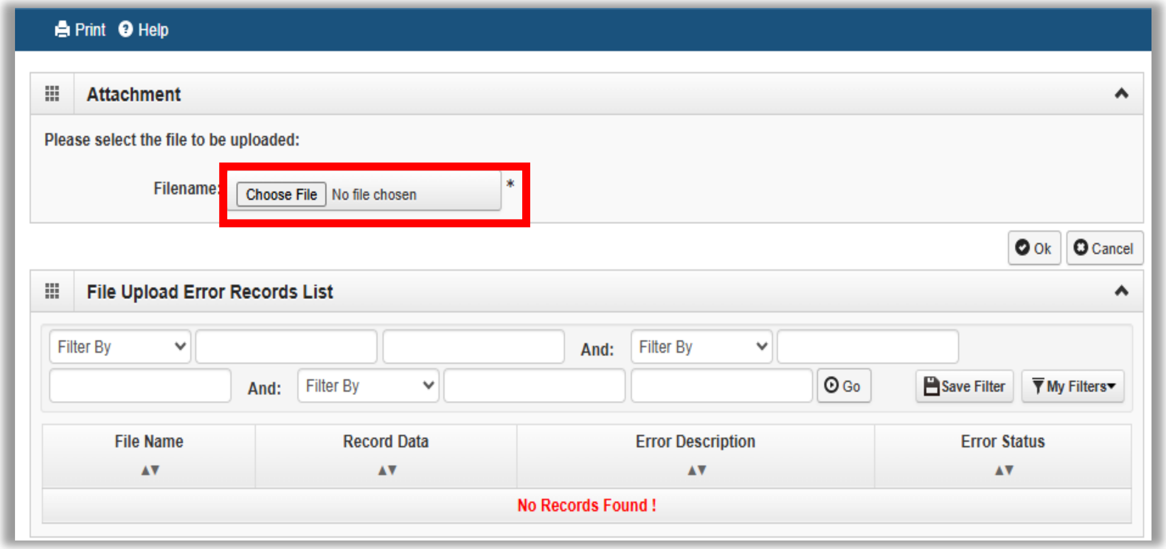
To remove information that contains a drop down, right-click the field and clear contents.



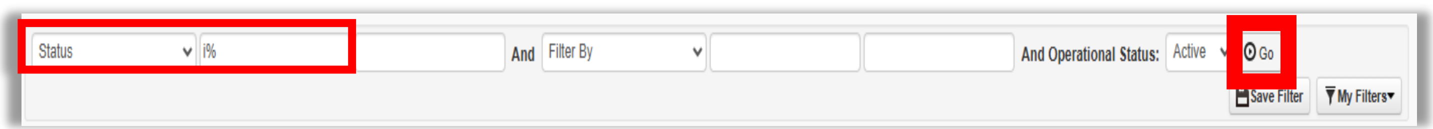
Once the Specialization Batch Template is completed, save it to your computer. Then click on the Specialization Batch Upload button.



Then click on the Choose File button and find the Specialization Batch Template file you saved. When it is uploaded, you should see the file name. Then you will want to click the ok button. If there are any errors with the upload, there will be a description in the File Upload Error Records List.



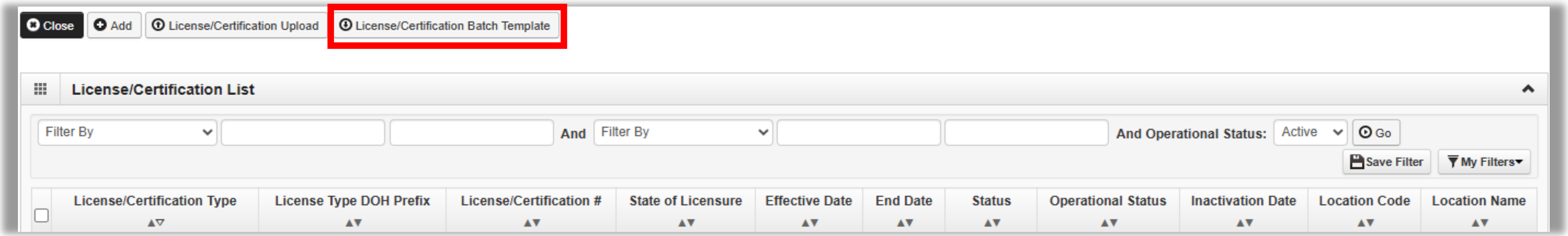
If the upload was successful, you will see the taxonomies by selecting status in the top left drop down and typing i% in the adjacent box. This will show the taxonomies that were successfully uploaded with the In Review status. Depending on the size of the file, it may take some time before the taxonomies are visible.



<u>Licenses:</u>

To submit multiple licenses for review at once, log into ProviderOne and click on the Link “Manage Provider Information”.

Click on the blue licenses step link and click on the License/Certification Batch Template button. This excel spreadsheet will download to your computer.



Fill out every column.

A. **ProviderOne ID –** Enter the ProviderOne ID (domain).
B. **Facility NPI –** Enter the NPI of the ProviderOne ID (domain) these taxonomies will be for.
C. **Location Code –** Select the location code these taxonomies will be provided at. Each location added in ProviderOne is assigned a location code. To see all location codes, go to step 2 Locations.
D. **License #** - Enter license number including any letters. For Behavior Health Agency License make sure to include the suffix
    a. Behavior Health Agencies this is very important that the address on the specific license matches the location you are adding them to for reporting purposes. (examples: PPG, MH OUT, SUDOUT, OPIOID, SUDIN, MHIN).
    BHAFSxxxxxxxx-MHIN
    BHAFSxxxxxxxx-MHOUT
    BHAFSxxxxxxxx-SUDOUT
    BHAFSxxxxxxxx-SUDIN
E. **License # Prefix –** <u>Please leave this field blank.</u>
F. **License cert type –** Select the type from the options in the drop down. For BHA facilities they should select Behavior Health Agency License for their WA DOH facility license.

a. **Note:** Each state agency in ProviderOne has different license requirements for each taxonomy.

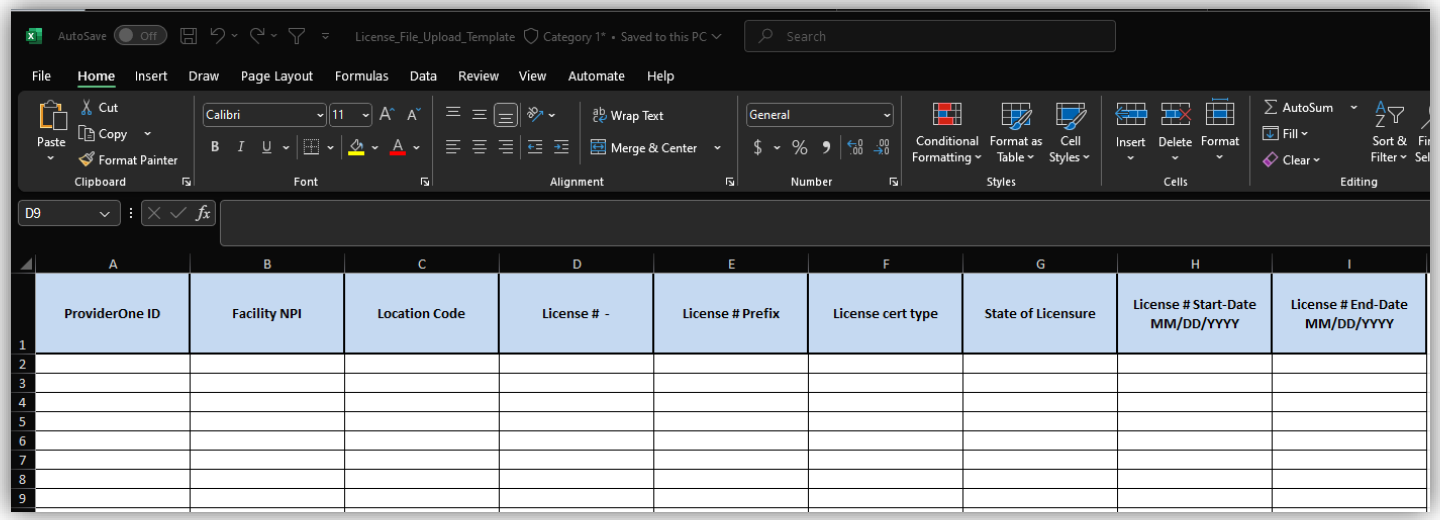
G. **State of Licensure –** Select the state in the drop down that issued the license.

H. **License # start date -** All dates entered on the spreadsheet must be formatted as: mm/dd/yyyy. The taxonomy start date cannot be before the provider enrollment date. The taxonomy date cannot before the location start date.

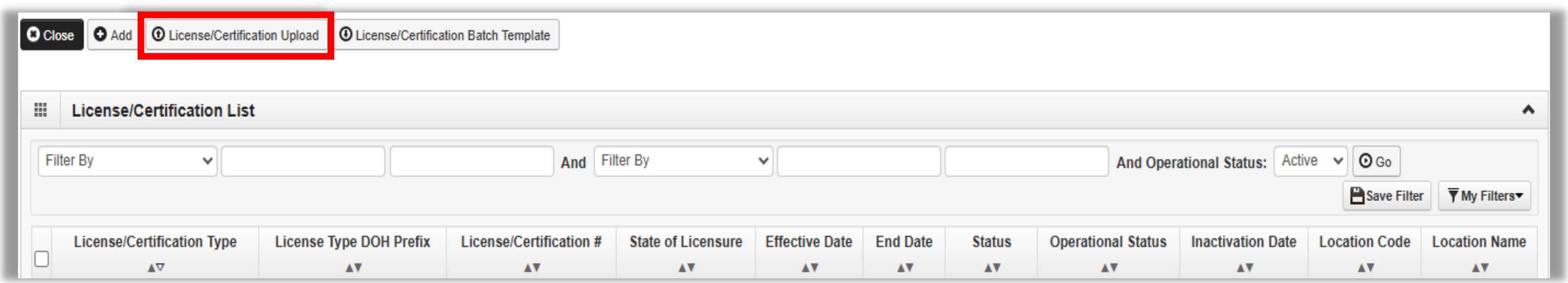
I. **License # end date –** All dates entered on the spreadsheet must be formatted as: mm/dd/yyyy.

a. **Note:** Only business licenses should have the 12/31/2999 end date.

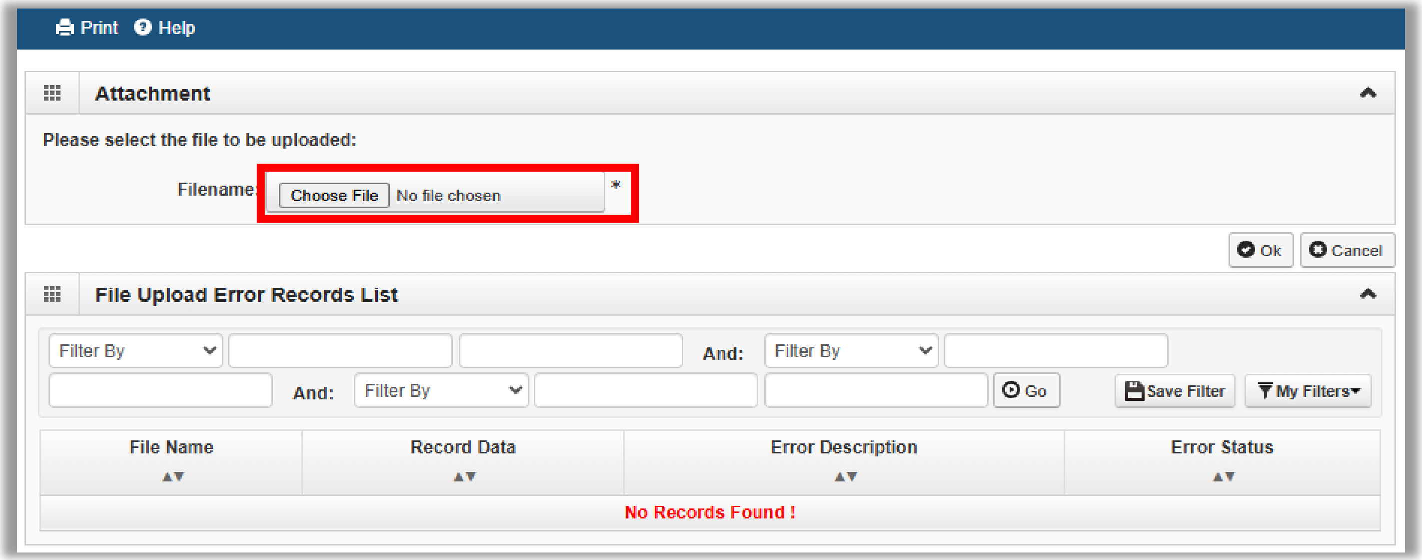
To remove information that contains a drop down, right-click the field and clear contents.



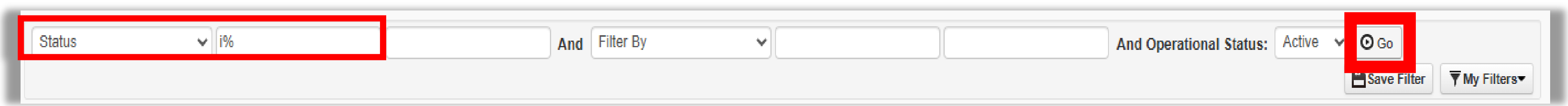
Once the License/Certification Batch Template is completed, save it to your computer. Then click on the Specialization Batch Upload button.



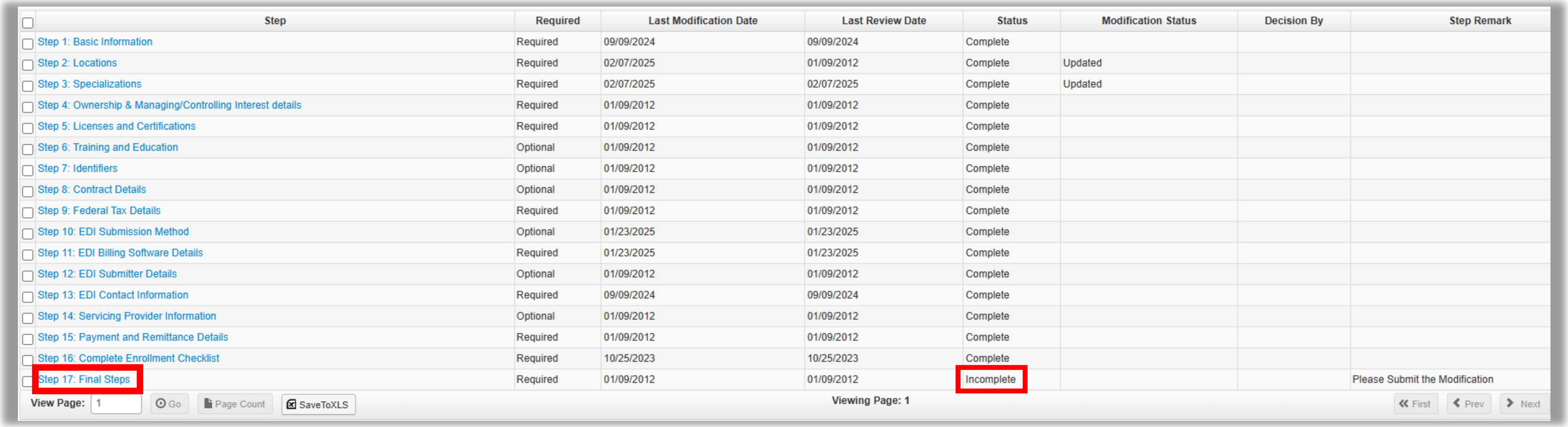
Then click on the Choose File button and find the License/Certification Batch Template file you saved. When it is uploaded, you should see the file name. Then you will want to click the ok button. If there are any errors with the upload, there will be a description in the File Upload Error Records List.



If the upload was successful, you will see the licenses and certifications by selecting status in the top left drop down and typing i% in the adjacent box. This will show the licenses that were successfully uploaded with the In Review status. Depending on the size of the file, it may take some time before the licenses are visible.



After making all updates, they will need to be submitted. Go to the very last step and click on the blue words Final Steps.



Step	Required	Last Modification Date	Last Review Date	Status	Modification Status	Decision By	Step Remark
Step 1: Basic Information	Required	09/09/2024	09/09/2024	Complete			
Step 2: Locations	Required	02/07/2025	01/09/2012	Complete	Updated		
Step 3: Specializations	Required	02/07/2025	02/07/2025	Complete	Updated		
Step 4: Ownership & Managing/Controlling Interest details	Required	01/09/2012	01/09/2012	Complete			
Step 5: Licenses and Certifications	Required	01/09/2012	01/09/2012	Complete			
Step 6: Training and Education	Optional	01/09/2012	01/09/2012	Complete			
Step 7: Identifiers	Optional	01/09/2012	01/09/2012	Complete			
Step 8: Contract Details	Optional	01/09/2012	01/09/2012	Complete			
Step 9: Federal Tax Details	Required	01/09/2012	01/09/2012	Complete			
Step 10: EDI Submission Method	Optional	01/23/2025	01/23/2025	Complete			
Step 11: EDI Billing Software Details	Required	01/23/2025	01/23/2025	Complete			
Step 12: EDI Submitter Details	Optional	01/09/2012	01/09/2012	Complete			
Step 13: EDI Contact Information	Required	09/09/2024	09/09/2024	Complete			
Step 14: Servicing Provider Information	Optional	01/09/2012	01/09/2012	Complete			
Step 15: Payment and Remittance Details	Required	01/09/2012	01/09/2012	Complete			
Step 16: Complete Enrollment Checklist	Required	10/25/2023	10/25/2023	Complete			
Step 17: Final Steps	Required	01/09/2012	01/09/2012	Incomplete			Please Submit the Modification

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In this step you may upload documents if you want before submitting. Then click on the Submit Provider Modification button. This will send the changes to state staff for review.