BCRS Management Information System Solution (BMISS)

NHSC Site Application PCO Portal User Guide

August, 2013
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Introduction: Primary Care Officer Portal User Guide

**Goal:** A State Primary Care Office staff member (PCO) will be able to review a New Site or Recertification Application and submit a recommendation to the BCRS Division of Regional Operations (DRO) for a site applying to the NHSC.

**NHSC Site Application Process**
1. Submit Site Application Online.
2. PCO Review and Recommendation.
3. Regional Office Review and Final Decision.

At the completion of this process the site’s request has been reviewed by their State PCO and the appropriate DRO Analyst has received a recommendation for the NHSC.

**Preconditions:** Before the State PCO can submit a recommendation, a Site Administrator must complete and submit a site application.
Section 1: Site Approval Process Diagram
Section 2: PCO Portal Account Management

Creating an Account
Only NHSC recognized State PCO staff members will be able to register accounts on the PCO portal. When registering for a PCO Portal account, the State PCO staff member must use the email address the NHSC has on file for the registration.

Steps:
1. Navigate to the NHSC Primary Care Officer Portal.
2. Select “Create a Primary Care Office account.”
3. Complete the fields on the “Create My Account” page
4. Select REGISTER.

Notes:
1. The user will receive a confirmation message when their registration is successful. An email is also sent to the email address used to register. Use the link in the email to activate the account. The account will be inaccessible until activated.
Logging into the PCO Portal

Only users that have created an account in the NHSC PCO Portal will be able to log in. If you have not created an account please reference the previous section “Creating an Account.”

Steps:
1. Enter the email address registered with the account.
2. Enter the password.
3. Select the login button.
Retrieving a Lost or Forgotten Password

The system will lock an account after three (3) unsuccessful login attempts. In the event that the user has either lost or forgotten their password and are locked out of the system, use the following steps to reset the password.

Steps:
1. Select the “Forgot Your Password?” link on the login page.
2. Enter the email address used to register your account, select NEXT.
3. Answer the security question you created during registration, select SUBMIT.
4. Check you email for a link to reset your password.
Section 3: NHSC State Primary Care Office Portal Landing Page

Viewing a New Site or Recertification Application

On the State PCO Portal landing page, the State PCO staff member is presented with four separate tabs each containing a list of New Site or Recertification Applications in different statuses. The State PCO staff member has the ability to view any request in any of the four tabs.

Pending PCO Review (p. 12)

Requests that have been submitted by the site, have not been reviewed by a DRO Analyst, and are currently in the 21 day State PCO comment period will be displayed here.

- The 21 day State PCO comment period refers to the length of time the State PCO staff member is able to submit recommendations/comments for a request that has yet to be reviewed by a DRO Analyst.

Initiated Applications (p. 9)

Requests that have been initiated by the site, but have not been submitted will be displayed here.

Pending DRO Review (p.10)

Requests that have exceeded the 21 day State PCO comment period, but have not been reviewed by a DRO Analyst will be displayed here.

History (p. 11)

Requests that have been reviewed by a DRO Analyst or cancelled will be displayed here.
Initiated Applications

All requests that have been initiated by a site located in the same state of the State PCO staff member will be displayed here. Upon selecting a New Site or Recertification Application, the request will open in a one page, read only format populated with the current information the Site Administrator has entered.

The Initiated Applications tab includes:

- Request Type- the type of initiated request.
- Site Name- the name of the site.
- City- the city the site is located in.
- Initiated Date- the date the request was started.

Notes:

1. Once the site administrator has entered the required information on the general information page of the particular request and selected either “Continue” or “Save for Later,” a portal message will be sent to the appropriate State PCO staff member(s) notifying him/her the corresponding site has started a New Site or Recertification Application.
2. The State PCO staff member has the ability to sort requests alphabetically by Site Name or City.
Pending DRO Review

All requests that have yet to be reviewed by a DRO Analyst and have exceeded the 21 day State PCO comment period will be displayed here. Upon selecting a New Site or Recertification Application, the request will open in a one page, read only format. If reviewed and commented on by a State PCO staff member, the request will display those comments in the Comment Section of the request.

The Pending DRO Review tab includes:
- Request Type- the type of request.
- Site Name- the name of the site.
- City- the city the site is located in.
- Submission Date- the date the Site Administrator submitted the request.
- PCO Review Date- the most recent date the request was reviewed by the State PCO staff member.
- PCO Decision- the most recent decision of the State PCO staff member (e.g. Yes, No, or N/A if there was no review).

Notes:
1. The State PCO staff member has the ability to sort requests alphabetically by Site Name or City.
History

All requests that have been reviewed by a DRO Analyst or have been cancelled will be displayed in this section. Upon selecting a New Site or Recertification Application, the request will open in a one page, read only format. If comments were made by the DRO Analyst or State PCO staff member during the review, they will be displayed in the Comment section of the request.

The History tab includes:

- Request Type- the type of request.
- Site Name- the name of the site.
- City- the city the site is located in.
- Decision Date- the date of the final decision.
- PCO Decision- the most recent decision of the State PCO staff member (e.g. Yes, No, or N/A if there was no review).
- Final Decision- the final decision of the request.

Notes:

1. Once the DRO Analyst has submitted a decision or the request has been cancelled, a portal message will be sent to the appropriate State PCO staff member(s) notifying him/her of the request’s outcome.
2. The State PCO staff member has the ability to sort requests alphabetically by Site Name or City, or chronologically by Decision Date.
Section 4: Reviewing an Application

Choosing a Request from the Task List
In the Pending PCO Review tab, the State PCO staff member is presented with a task list of submitted requests. All New Site and Recertification Applications that have been submitted by the site, have not been reviewed by a DRO Analyst, and were submitted during the previous 21 days will appear in this list. In order to begin reviewing a request, select “Review Application/Recertification” for the site in the list you wish to review. As long as the site remains in the Pending PCO Review tab, you may review and submit multiple recommendations for that site.

The Pending PCO Review tab includes:
- Request Type - the type of request.
- Site Name - the name of the site.
- City - the city the site is located in.
- Submission Date - the date the Site Administrator submitted the request.
- Due Date - the latest date the State PCO staff member is able to review the request. This date is 21 days after the submission date.
- PCO Review Date - the most recent date the request was reviewed by the State PCO staff member.
- PCO Decision - the most recent decision of the State PCO staff member (e.g. Yes, No, or N/A if there was no review).

Notes:
1. Once the Site has submitted a request, a portal message will be sent to the appropriate State PCO staff member(s) notifying him/her the corresponding site has submitted a site application or recertification application.
2. The State PCO staff member has the ability to sort requests alphabetically by Site Name or City.
Reviewing the General Information

The first page of the New Site or Recertification Application is the “General Information” page. Here the user can review the Site Information, POC Information, NHSC Program Information, and Supporting Documents attached to the request.

Steps:
1. Review the information.
2. Select **CONTINUE** to proceed to the next page.

Notes:
1. All information is displayed in a read only format.
2. The State PCO staff member has the ability to open and review all uploaded supporting documents.
Verify, Edit and Add HPSAs

The Verify, Edit and Add HPSAs page allows the State PCO staff member to suggest HPSAs appropriate for the site using the HPSA Find Tool as well as recommend HPSAs the Site Administrator has suggested. HPSA suggestion is not required to submit a recommendation.

Verify that the existing HPSAs and HPSAs suggested by the Site are correct for Test Site 100. If there are missing HPSAs that correspond to services provided at the site, enter them below. Note: If the Existing HPSAs are incorrect, please note the error in the Document section at the end of this review.

SUGGEST A HPSA

If an applicable HPSA ID for Test Site 100 is missing in the sections below, please enter the ID(s) below. HPSA IDs can be found using the HPSA Find tool and must correspond to the services (primary care, mental health, and/or dental) provided at this site location.

Enter the HPSA ID

Note: The NHSC system updates HPSA scores annually on January 1st. If this field does not recognize a designated HPSA from the HPSA Find database, please continue with the application. The application will be held and processed after the January 1st HPSA update if the application meets all other requirements.

HPSAs Suggested by the Site

Please make a recommendation on whether or not the HPSA ID(s) suggested by the site are applicable to the applying site location.

<table>
<thead>
<tr>
<th>HPSA ID</th>
<th>Name</th>
<th>Auto-HPSA</th>
<th>Score</th>
<th>HPSA Discipline</th>
<th>Status</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>117969174P</td>
<td>Western Illinois Correctional Center</td>
<td>No</td>
<td>15</td>
<td>Primary Care</td>
<td>Designated</td>
<td>Recommended</td>
</tr>
<tr>
<td>817969171N</td>
<td>Low Income - Brown County</td>
<td>No</td>
<td>17</td>
<td>Dental</td>
<td>Designated</td>
<td>Not Recommended</td>
</tr>
</tbody>
</table>

HPSAs Suggested by the PCO

Please make a recommendation on whether or not the HPSA ID(s) suggested by the PCO are applicable to the applying site location.

<table>
<thead>
<tr>
<th>HPSA ID</th>
<th>Name</th>
<th>Auto-HPSA</th>
<th>Score</th>
<th>HPSA Discipline</th>
<th>Status</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>610991019S</td>
<td>Westside Health Services</td>
<td>Yes</td>
<td>10</td>
<td>Dental</td>
<td>Designated</td>
<td>Recommended</td>
</tr>
</tbody>
</table>

Steps for Suggesting a HPSA:

1. Select the link for the “HPSA Find Tool” to search for valid HPSAs (external web page)*.
2. Enter the HPSA ID and select Add.
3. When finished entering HPSAs for the site, select Continue.

Steps for Recommending a HPSA:

1. Select Recommend.

HPSA Rules:

1. An active site must be assigned at least one (1) HPSA
2. A site may not be assigned more than six (6) HPSAs
3. A site may not be assigned more than one (1) HPSA of each type (e.g. Primary Medical Care, Dental, and Mental Health), unless one of the HPSAs is an Auto-HPSA.

*The HPSA Find Tool is an online tool furnished by the Health Resources and Services Administration (HRSA) that allows the user to search for HPSAs by address. For information on using the HPSA find tool, refer to documentation on the tool site.

Notes:

1. During review by a DRO Analyst, the request will differentiate who the HPSA was suggested by and if it was recommended by the State PCO staff member.
2. HPSAs suggested by the State PCO staff member are automatically added in “Recommended” status.
3. HPSAs suggested by the State PCO staff member must match the services provided which were selected by the site. (I.e. you cannot add a Dental HPSA if the site did not select that it provides Primary Dental Health Care).
Submit a Site Recommendation

The final step in the State PCO review is submitting a recommendation for the site. The State PCO staff member is not required to enter comments regarding their decision before submitting a recommendation, but it is suggested. Previous comments concerning this request will be displayed in the Existing PCO Comments section or Existing DRO Comments section respectively.

Submit Site Recommendation

Enter your NHSC site approval recommendation for Test Site 100 below. Explain your recommendation in the Comment section. Please include information on all issues identified in the site application and note if a site visit is recommended prior to approval. Note: The Comment section is visible only to HRSA staff and not to the applying site.

Recommend Site for Approval? *

☐ Yes
☐ No

Comments
Add a comment

Existing PCO Comments

Stephanie
This is a good site!
on 8/19/13 3:10:03 PM

Existing DRO Comments

There are no existing comments.

Upon clicking the "Submit Recommendation" button, this recommendation will be forwarded to the appropriate NHSC Regional Office for final review and decision.

What Happens Now?

Upon submission, the recommendation is sent to the appropriate analyst at the NHSC Regional Office for review. After the analyst completes their review and makes a decision, a portal message notifying the Site Administrator and State PCO staff member of the decision will be sent to their “My Messages” inbox and the status of the request will be updated.

Steps:
1. Select a recommendation for the site (e.g. Yes or No).
2. Enter a comment in the box provided.
3. Select SUBMIT RECOMMENDATION.

Notes:
1. Once a recommendation has been submitted, the user will be returned to the landing page and a confirmation message will be displayed.
2. The request will remain in the Pending PCO Review tab until a final decision has been made or the 21 day State PCO comment period has expired.