

General Information

The Electronic Document Management (eDocMgmt) functionality lets the nursing facility community including any parent companies, Myers & Stauffer (MSLC), DMAS & Xerox users, have access to information needed for cost reporting efforts.

Access to the system is restricted based on the user's role and their security. There are two new security roles – AuthStaff – eDoc Upd and AuthStaff-eDoc Inq that will let users see different screens. Users that should have no access to eDocMgmt can be restricted via the View/Edit User functionality.

The eDocMgmt system contains 4 options. The following is the full list of menu options:

- Document Search
- Document Upload
- Parent/Provider Association Search
- File Folder/Doc Type Exclusion

Nursing Facility providers and associated parent companies will have access to the first two menu options, assuming a valid security role.

MSLC users, DMAS users & Xerox users will have access to all four menu options, again assuming a valid security role.

The Document Search option will let the user enter search criteria including a file folder, document type and date parameter(s). Any document that meets that criteria for the associated provider will be displayed and available for downloading to review, load to a local drive and/or print.

The Document Upload lets the user upload documents to eDocMgmt and associate search properties to the document so that it's available for search and retrieval.

All provider NPIs that are part of the eDocMgmt population (based on a list from DMAS & MSLC) will be loaded in to the Parent Association Table. This table is checked to determine if the NPI or parent association API exists as part of eDocMgmt.

The Parent/Provider Association Search option lets the user check to see if an NPI is part of eDocMgmt, and if they are associated with a parent company. The reserve is also an option, where the user can select a parent company and see all NPIs associated with that parent.

In combination with user roles and security roles, access to specific File Folders and/or Doc Types can be restricted so that users are not accessing information that should not be available to them.

The File Folder/Doc Type Exclusion option will let MSLC, DMAS and Xerox users check if any exclusion(s) are associated with a specific User ID. If the User ID is not known, then the user can check

all users associated with a specific NPI/API and then select the user id. From this screen exclusions can be added/removed.

Data Elements

Data Elements Not Previously Defined

- File Folder (PDE-1362)
- Document Type (PDE-1363)
- Fiscal Period End Date (PDE-1364)

Data Elements Previously Defined

- NPI/API (pdE-0610)
- Provider Name (existing – Provider Org-Last Name pdE-0011; Provider's First Name pdE-0012)
- User ID (existing Submitter ID pdE-0006)
- User First Name (pdE-0463)
- User Last Name (pdE-0464)
- Delete Ind (existing Mail Delete Ind pdE-1360)
- Document Date (existing Mail Document Date pdE-1358)
- Document Description (existing Mail Description pdE-1359)

File Folder (PDE-1362)

General Information

This is the folder type assigned to documents for eDocMgmt. The file folders were defined by Myers & Stauffer LC based on the folders being used in GoFileRoom.

Page	<ul style="list-style-type: none">• eDocMgmt Document Search• eDocMgmt Search Results• eDocMgmt Document Upload• eDocMgmt File Folder/Doc Type Results (User View)
Portlet Name	<ul style="list-style-type: none">• Document Search• Search Results• Document Upload• File Folder/Doc Type Exclusion Results (User Selection)
Element Type	Drop Down
Data Type	Alphanumeric
Field Type	Required
Size	50
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

- General Correspondence
- Permanent
- Cost Report Filing PBP
- Field Audit PBP
- Home Office PBP
- PFA PBP
- Reports PBDMAS
- Cost Settlement PB Myers and Stauffer
- Field Audit PB Myers and Stauffer

- Home Office PB Myers and Stauffer
- PFA PB Myers and Stauffer

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt Document Search
- EDM-S-0003 – eDocMgmt Search Results
- EDM-S-0004 – eDocMgmt Document Upload
- EDM-S-0011 – eDocMgmt File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables - Portal

- EDM-T-0001 – EMC Report Table
- EDM-T-0002 – Folder/Doc Type Table
- EDM-T-0003 – Folder/Doc Type Exclusion Table

Document Type (PDE-1363)

General Information

This is the document type associated to the folder type assigned to documents for eDocMgmt. The document types were defined by Myers & Stauffer LC based on the folders being used in GoFileRoom.

Page	<ul style="list-style-type: none">• eDocMgmt Document Search• eDocMgmt Search Results• eDocMgmt Document Upload• eDocMgmt File Folder/Doc Type Results (User View)
Portlet Name	<ul style="list-style-type: none">• Document Search• Search Results• Document Upload• File Folder/Doc Type Exclusion Results (User Selection)
Element Type	Drop Down
Data Type	Alphanumeric
Field Type	Required
Size	50
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

General Correspondence

- Incoming
- Outgoing

Permanent

- Articles of Incorporation
- Board of Director Minutes
- Chart of Accounts

- Contracts
- Corporate By-Laws
- Equity Accounts and Ownership
- Fixed Assets & Depreciation Schedules
- Insurance
- Leases
- Legal and Capital Structure
- Loans and L/T Debt Agreements
- Operating/Partnership Agreement
- Organizational Charts
- Real Estate
- Stock Book

Cost Report Filing PBP

- A-4 Support
- A-6 Support
- A-8 Support
- Additional Requested Information
- Audited Financial Statements
- Cost Report
- Cost Report Questionnaire
- Fixed Asset Schedule
- Grouping Schedule
- Proof of Payment
- Trial Balance
- NF Wage Survey
- FRV Reporting Form

Field Audit PBP

- General Ledger
- Invoices
- Workpapers

Home Office PBP

- Additional Requested Information
- Audited Financial Statements
- B-1 Support
- C Support
- Cost Report Questionnaire
- Fixed Asset Schedule
- Grouping Schedule
- Home Office Cost Report
- Trial Balance

PFA PBP

- A/R Aging
- Admissions Package
- Bank Statements
- DMAS 122
- GL Trial Balance
- Petty Cash Reconciliation
- PFA Account Bank Signature Card
- PFA Account Reconciliation
- PFA Quarterly Statement
- PFA Trial Balance
- Surety Bond

Reports PBDMAS

- Annual CMI Notification
- Cost Report Settlement Data
- ECR Data
- Facility Case Mix
- Resident Case Mix
- Old ECR Versions
- Patient Pay

Cost Settlement PB Myers and Stauffer

- Adjustment Report
- Adjustment Report Workpapers
- NPR Letter
- Settled Cost Report
- Settlement Summary
- Transmittal Letter
- FRV Annual Report

Field Audit PB Myers and Stauffer

- FAAR Supporting Workpapers
- Field Audit Adjustment Report

Home Office PB Myers and Stauffer

- Adjustment Report
- Adjustment Report Workpapers
- NPR Letter
- Settled Cost Report

PFA PB Myers and Stauffer

- Attachment A
- Attachment B
- Attachment C
- Audit Report

- Schedule A
- Schedule B

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt Document Search
- EDM-S-0003 – eDocMgmt Search Results
- EDM-S-0004 – eDocMgmt Document Upload
- EDM-S-0011 – eDocMgmt File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables – Portal

- EDM-T-0001 – EMC Report Table
- EDM-T-0002 – Folder/Doc Type Table
- EDM-T-0003 – Folder/Doc Type Exclusion Table

Fiscal Period End Date (PDE-1364)

General Information

This field contains the fiscal period end date associated with the document in the eDocMgmt repository.

Page	<ul style="list-style-type: none">• eDocMgmt Document Search• eDocMgmt Search Results• eDocMgmt Document Upload
Portlet Name	<ul style="list-style-type: none">• Document Search• Search Results• Document Upload
Element Type	Text
Data Type	Date
Field Type	Required
Size	10
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

- Date format – MM/DD/CCYY

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt Document Search
- EDM-S-0003 – eDocMgmt Search Results
- EDM-S-0004 – eDocMgmt Document Upload

Tables – MMIS/DB2

N/A

Tables - Portal

- EDM-T-0001 – EMC Report Table

User ID (PDE-0006)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-0006
Page	<ul style="list-style-type: none">• eDocMgmt - File Folder/Doc Type Exclusions• eDocMgmt - File Folder/Doc Type Results (NPI View)• eDocMgmt - File Folder/Doc Type Results (User View)
Portlet Name	<ul style="list-style-type: none">• File Folder/Doc Type Exclusion• File Folder/Doc Type Results (NPI View)• File Folder/Doc Type Results (User View)
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0009 – eDocMgmt – File Folder/Doc Type Exclusion
- EDM-S-0010 – eDocMgmt – File Folder/Doc Type Results (NPI View)
- EDM-S-0011 – eDocMgmt - File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables – Portal

- EDM-T-0003 – Folder/Doc Type Exclusion Table

Provider Name (PDE-0011; PDE-0012)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-0011 and pdE-0012
Page	<ul style="list-style-type: none">• eDocMgmt - Document Search• eDocMgmt - Search Results• eDocMgmt – Provider/Parent Association Results
Portlet Name	<ul style="list-style-type: none">• Document Search• Search Results• Provider/Parent Association Results
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt - Document Search
- EDM-S-0003 – eDocMgmt - Search Results
- EDM-S-0006 – eDocMgmt – Provider/Parent Association Results

Tables – MMIS/DB2

N/A

Tables - Portal

N/A

Provider Name (PDE-0011; PDE-0012)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-0011 and pdE-0012
Page	<ul style="list-style-type: none">• eDocMgmt - Document Search• eDocMgmt - Search Results• eDocMgmt – Provider/Parent Association Results
Portlet Name	<ul style="list-style-type: none">• Document Search• Search Results• Provider/Parent Association Results
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt - Document Search
- EDM-S-0003 – eDocMgmt - Search Results
- EDM-S-0006 – eDocMgmt – Provider/Parent Association Results

Tables – MMIS/DB2

N/A

Tables - Portal

N/A

User First Name (PDE-0463)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-0463
Page	<ul style="list-style-type: none">eDocMgmt - File Folder/Doc Type Results (NPI View)eDocMgmt - File Folder/Doc Type Results (User View)
Portlet Name	<ul style="list-style-type: none">File Folder/Doc Type Results (NPI View)File Folder/Doc Type Results (User View)
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0010 – eDocMgmt – File Folder/Doc Type Results (NPI View)
- EDM-S-0011 – eDocMgmt - File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables - Portal

- EDM-T-0003 – Folder/Doc Type Exclusion Table

User Last Name (PDE-0464)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-0464
Page	<ul style="list-style-type: none">eDocMgmt - File Folder/Doc Type Results (NPI View)eDocMgmt - File Folder/Doc Type Results (User View)
Portlet Name	<ul style="list-style-type: none">File Folder/Doc Type Results (NPI View)File Folder/Doc Type Results (User View)
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0010 – eDocMgmt – File Folder/Doc Type Results (NPI View)
- EDM-S-0011 – eDocMgmt - File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables – Portal

- EDM-T-0003 – Folder/Doc Type Exclusion Table

NPI/API (PDE-0610)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-0610
Page	<ul style="list-style-type: none"> • eDocMgmt - Document Search • eDocMgmt - Search Results • eDocMgmt - Document Upload • eDocMgmt – Parent/Provider Association Search • eDocMgmt – Provider/Parent Association Results • eDocMgmt – Parent/Provider • eDocMgmt - File Folder/Doc Type Exclusions • eDocMgmt - File Folder/Doc Type Results (NPI View) • eDocMgmt - File Folder/Doc Type Results (User View) • eDocMgmt – NPI Selection
Portlet Name	<ul style="list-style-type: none"> • Document Search • Search Results • Document Upload • Parent/Provider Association Search • Parent/Provider Association Results • Provider/Parent Association Results • File Folder/Doc Type Exclusion • File Folder/Doc Type Results (NPI View) • File Folder/Doc Type Results (User View) • eDocMgmt – NPI Selection
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

- Must be 10 digit numeric
- Must be an active provider on the MMIS
- Must not be a program 10 or program 12 (only) provider
- Must exist within the eDocMgmt functionality (has a record on the Provider/ Parent Association Table)

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt - Document Search
- EDM-S-0003 – eDocMgmt - Search Results
- EDM-S-0004 – eDocMgmt - Document Upload
- EDM-S-0005 – eDocMgmt – Parent/Provider Association Search
- EDM-S-0006 – eDocMgmt – Provider/Parent Association Results
- EDM-S-0007 – eDocMgmt – Parent/Provider Association Results
- EDM-S-0009 – eDocMgmt – File Folder/Doc Type Exclusion
- EDM-S-0010 – eDocMgmt – File Folder/Doc Type Results (NPI View)
- EDM-S-0011 – eDocMgmt - File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables – Portal

- EDM-T-0001 – ECM Report Table
- EDM-T-0003 – Folder/Doc Type Exclusion Table
- EDM-T-0004 – Provider/Parent Association Table
- PUB-T-0001 – Web Registration Table
- WPR-T-0001 – Web User Role Table

Document Date (PDE-1358)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-1358
Page	<ul style="list-style-type: none">eDocMgmt – Document SearcheDocMgmt - Search Results
Portlet Name	<ul style="list-style-type: none">Document SearchSearch Results
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

- Date Format needs to be MM/DD/YYYY

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0002 – eDocMgmt - Search
- EDM-S-0003 – eDocMgmt – Search Results

Tables – MMIS/DB2

N/A

Tables - Portal

- EDM-T-0001 – ECM Report Table

Document Description (PDE-1359)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-1359
Page	<ul style="list-style-type: none">• eDocMgmt - Search Results• eDocMgmt – Document Upload
Portlet Name	<ul style="list-style-type: none">• Search Results• Document Upload
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

- Display only on the Search Results
- Required entry on the Document Upload

Valid Values

N/A

Outputs

N/A

Screens

- EDM-S-0003 – eDocMgmt - Search Results
- EDM-S-0004 – eDocMgmt – Document Upload

Tables – MMIS/DB2

N/A

Tables - Portal

- EDM-T-0001 – ECM Report Table

Delete Ind (PDE-1360)

General Information

This data element has previously been defined. The following information is how this data element is used within the eDocMgmt functionality.

Portal Data Element	pdE-1360
Page	<ul style="list-style-type: none">• eDocMgmt - Search Results (MSLC/Internal User Version)• eDocMgmt – Parent/Provider Association Results• eDocMgmt - File Folder/Doc Type Results (NPI View)• eDocMgmt - File Folder/Doc Type Results (User View)
Portlet Name	<ul style="list-style-type: none">• Search Results• Parent/Provider Association Results• File Folder/Doc Type Results (NPI View)• File Folder/Doc Type Results (User View)
Element Type	N/A
Data Type	N/A
Field Type	N/A
Size	N/A
MMIS Data Element	N/A
MMIS DE Number	N/A

Business Rules

N/A

Valid Values

- Unchecked = no delete request
- Checked = delete request

Outputs

N/A

Screens

- EDM-S-0003 – eDocMgmt - Search Results
- EDM-S-0006 – eDocMgmt – Provider/Parent Association Results
- EDM-S-0010 – eDocMgmt – File Folder/Doc Type Results (NPI View)
- EDM-S-0011 – eDocMgmt - File Folder/Doc Type Results (User View)

Tables – MMIS/DB2

N/A

Tables – Portal

- EDM-T-0001 – ECM Report Table

Outputs

N/A

Programs

- Provider (MH/ICF) Users Flow
- Parent Company Users Flow
- Internal Users Flow
- MSLC Users Flow
- Superuser Provider Flow

Provider (NH/ICF) Users Flow

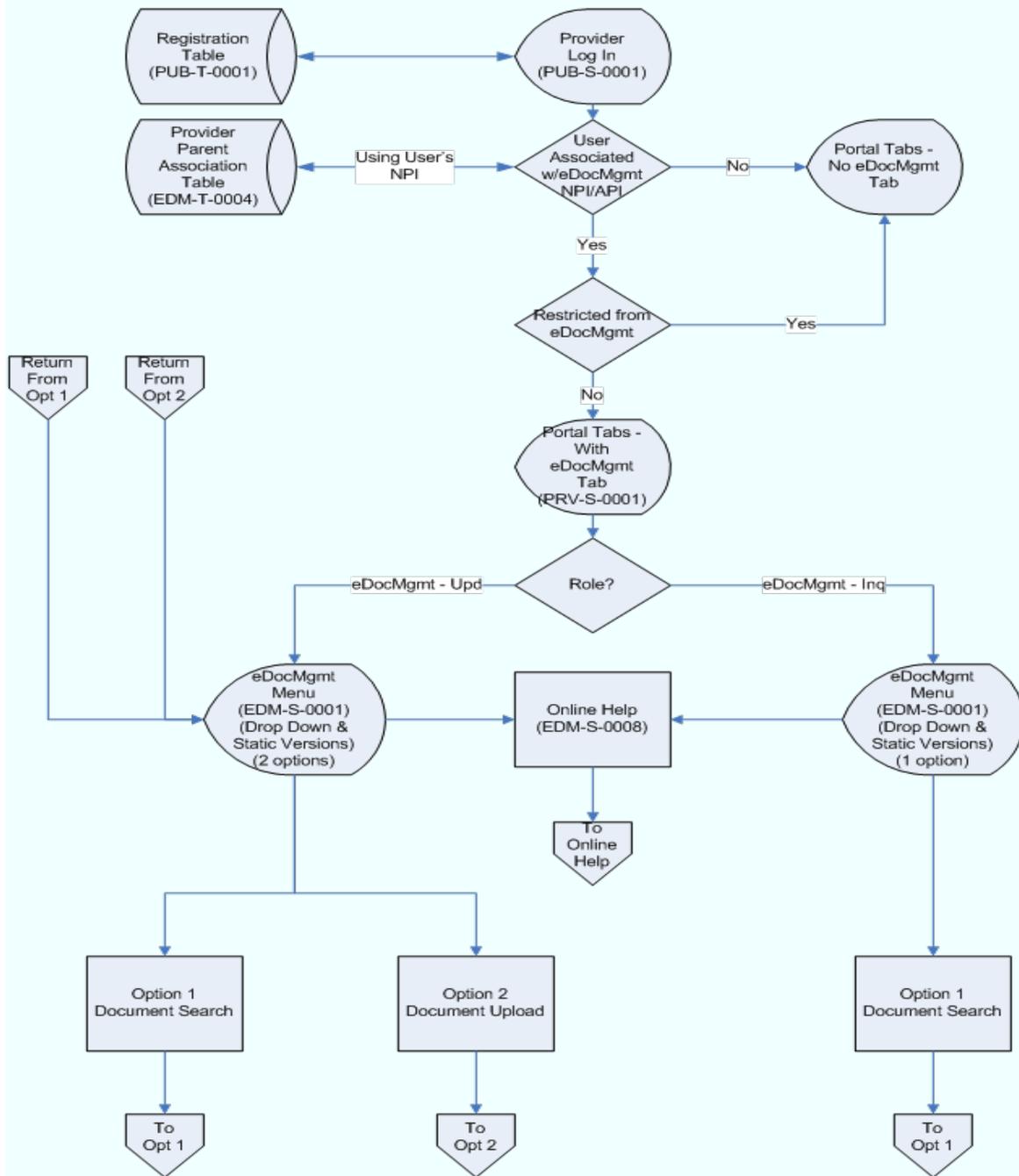
General Information

This is the flow of programs and screens that are utilized by the NH/ICF provider users. Users will have access to search and upload functionality.

Process

Provider Users – Menu

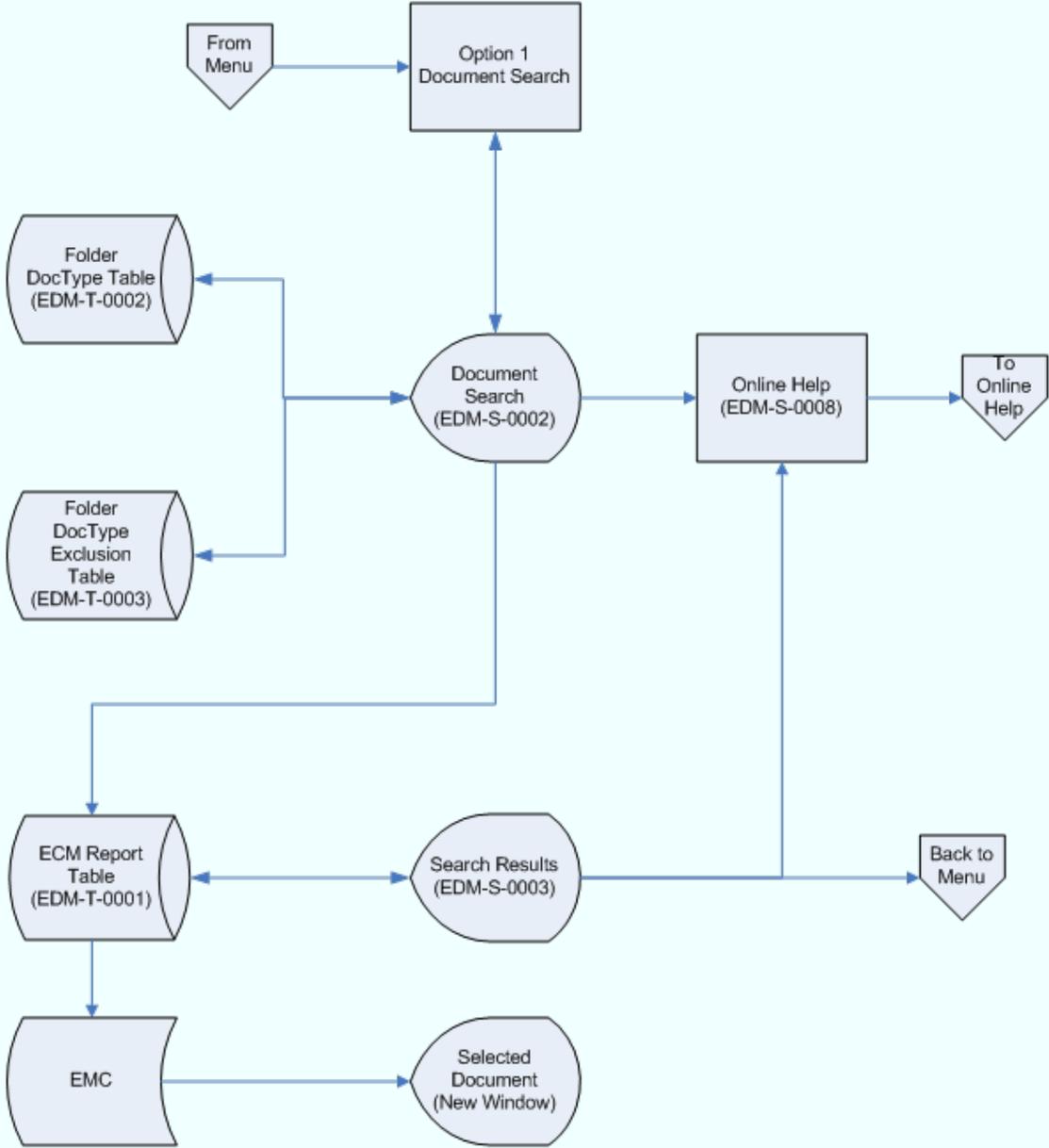
Provider User - Menu



Provider Users – Option 1

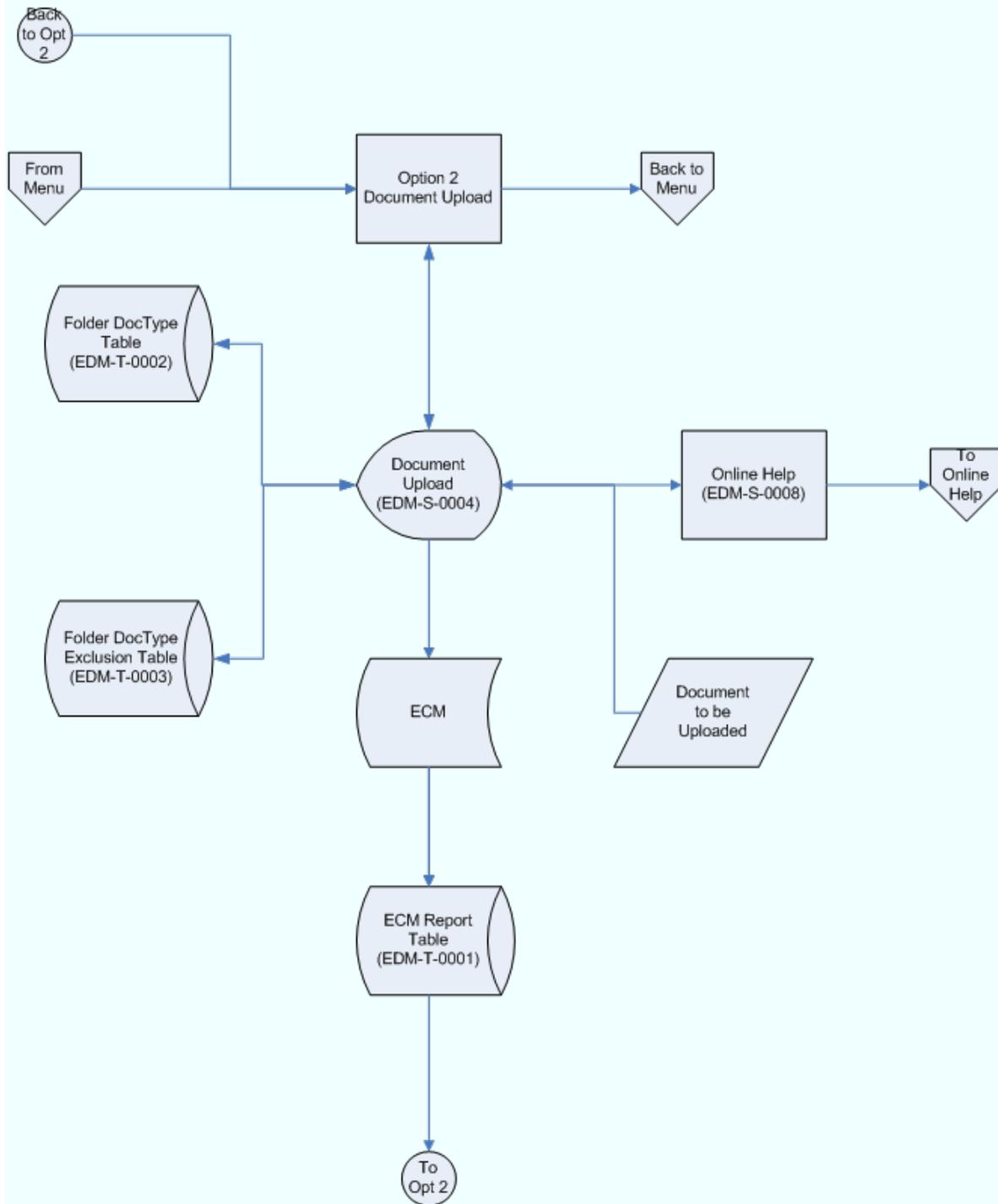
To
Opt 1

Provider User – Option 1



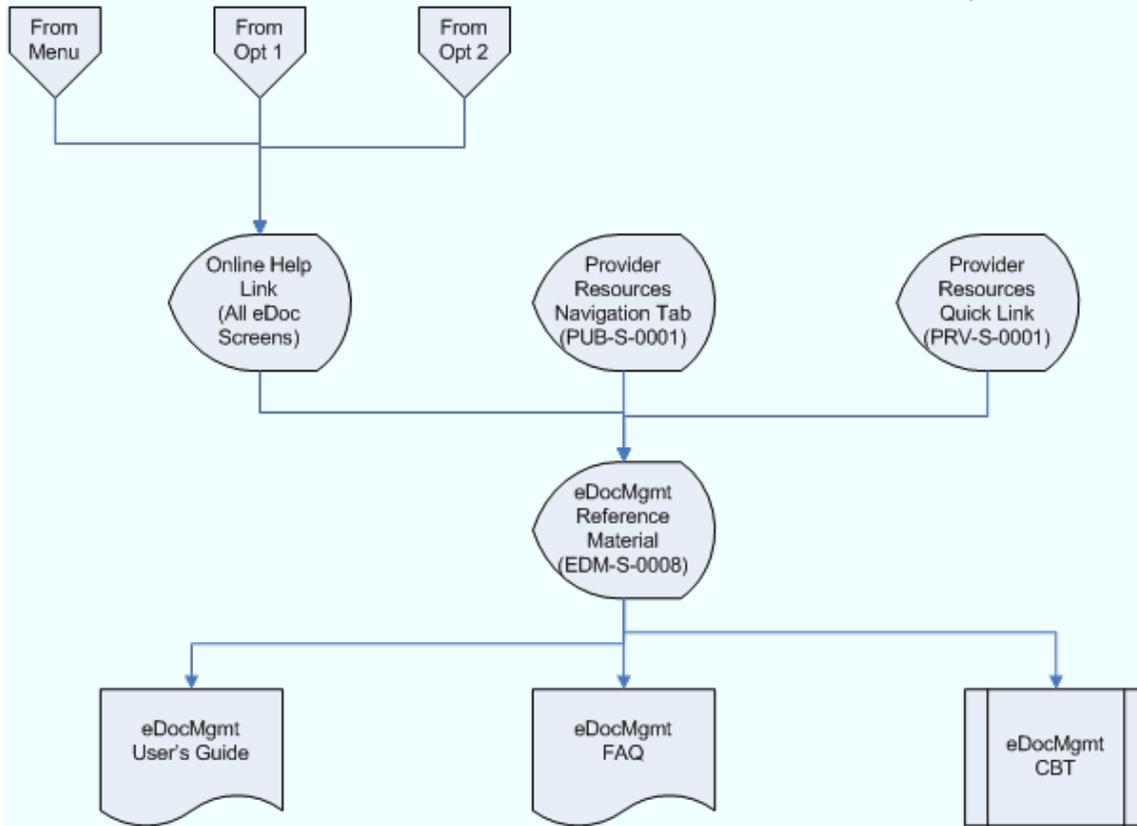
Provider Users – Option 2

Provider User – Option 2



Online Help

Online Help



Parent Company Users Flow

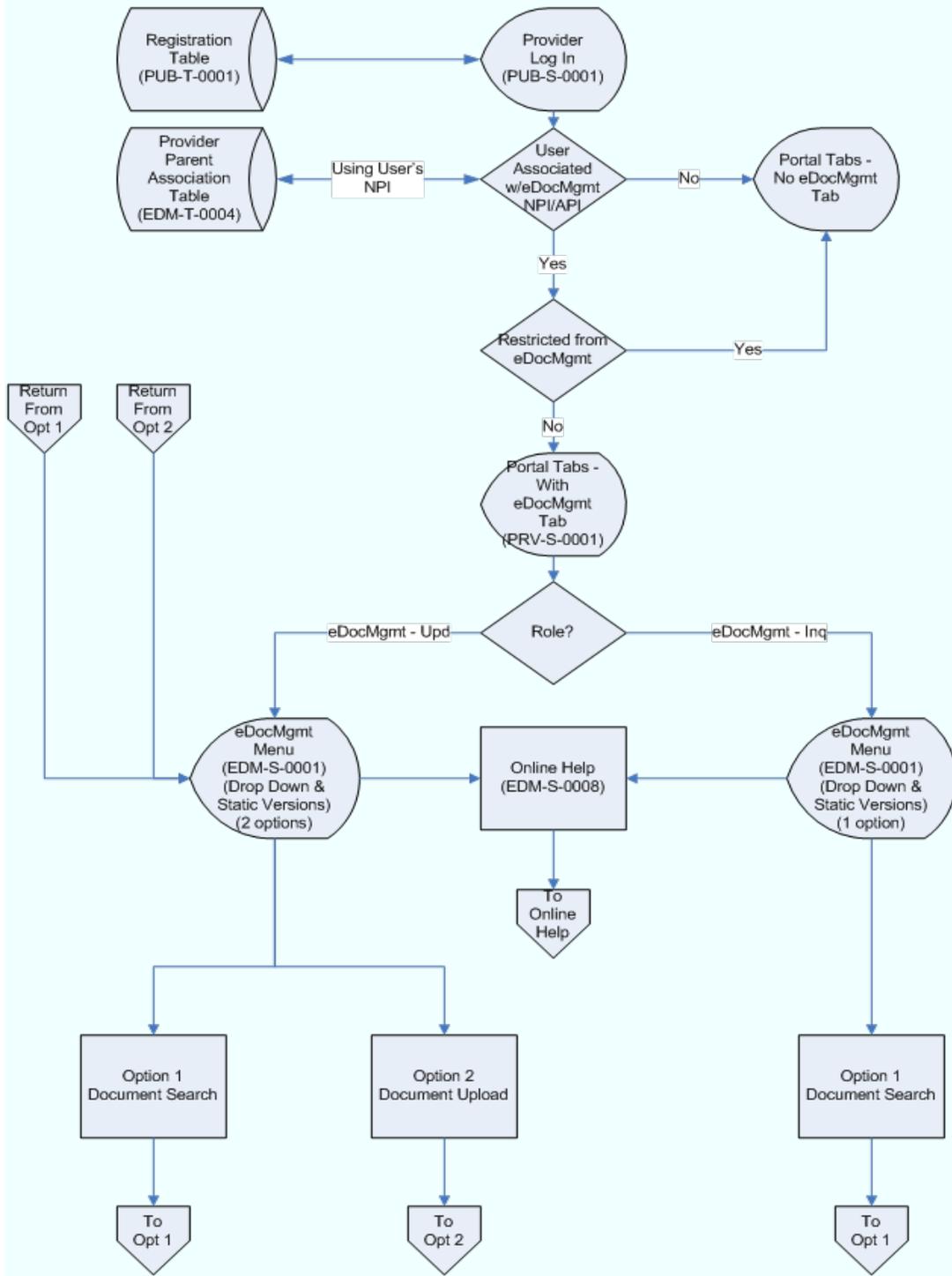
General Information

This is the flow of programs and screens that are utilized by the users associated with the Parent Companies. Users will have access to search and upload functionality for both their specific parent company and the specific NPIs that are associated to that parent company.

Process

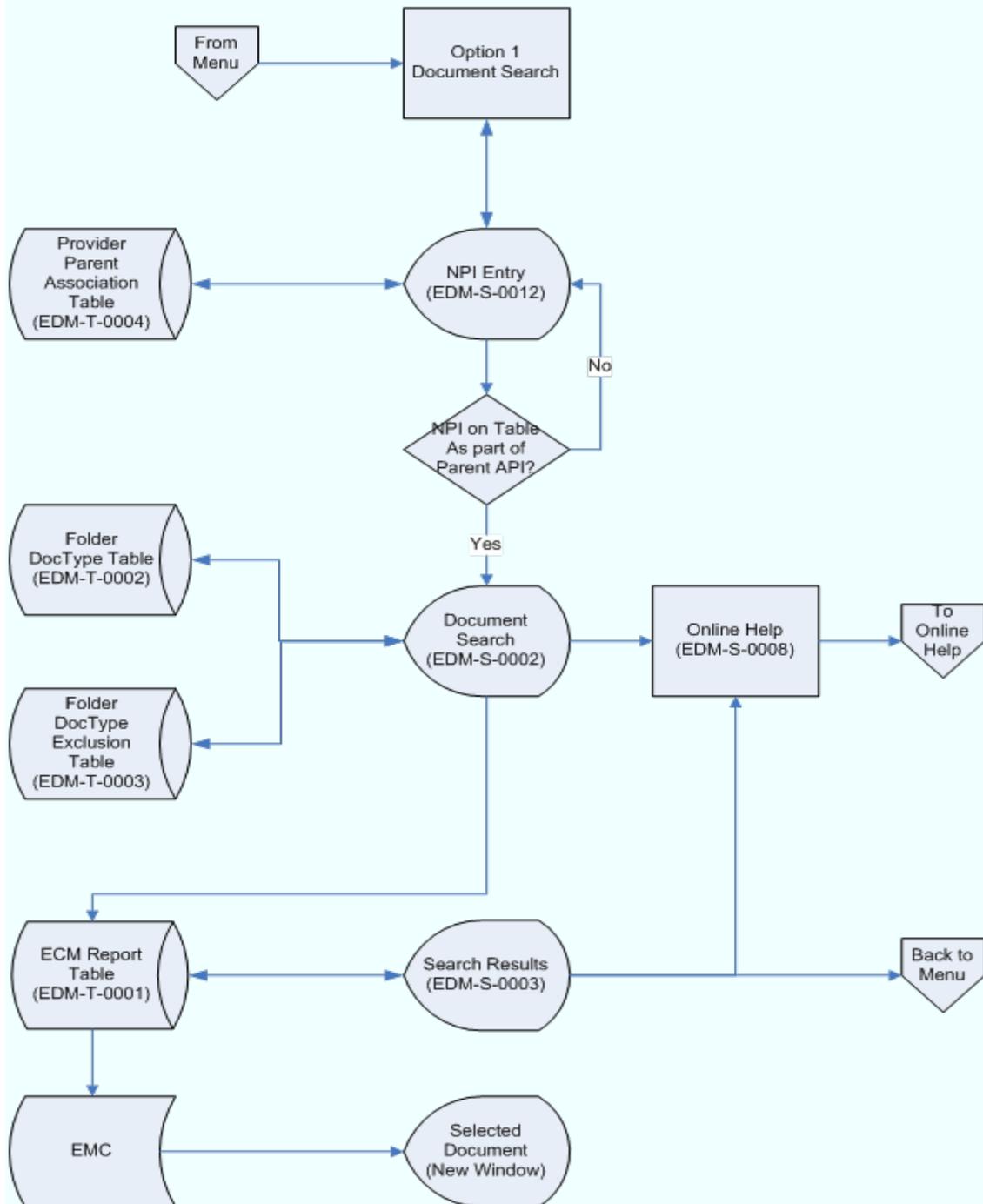
Parent Company Users - Menu

Parent User - Menu



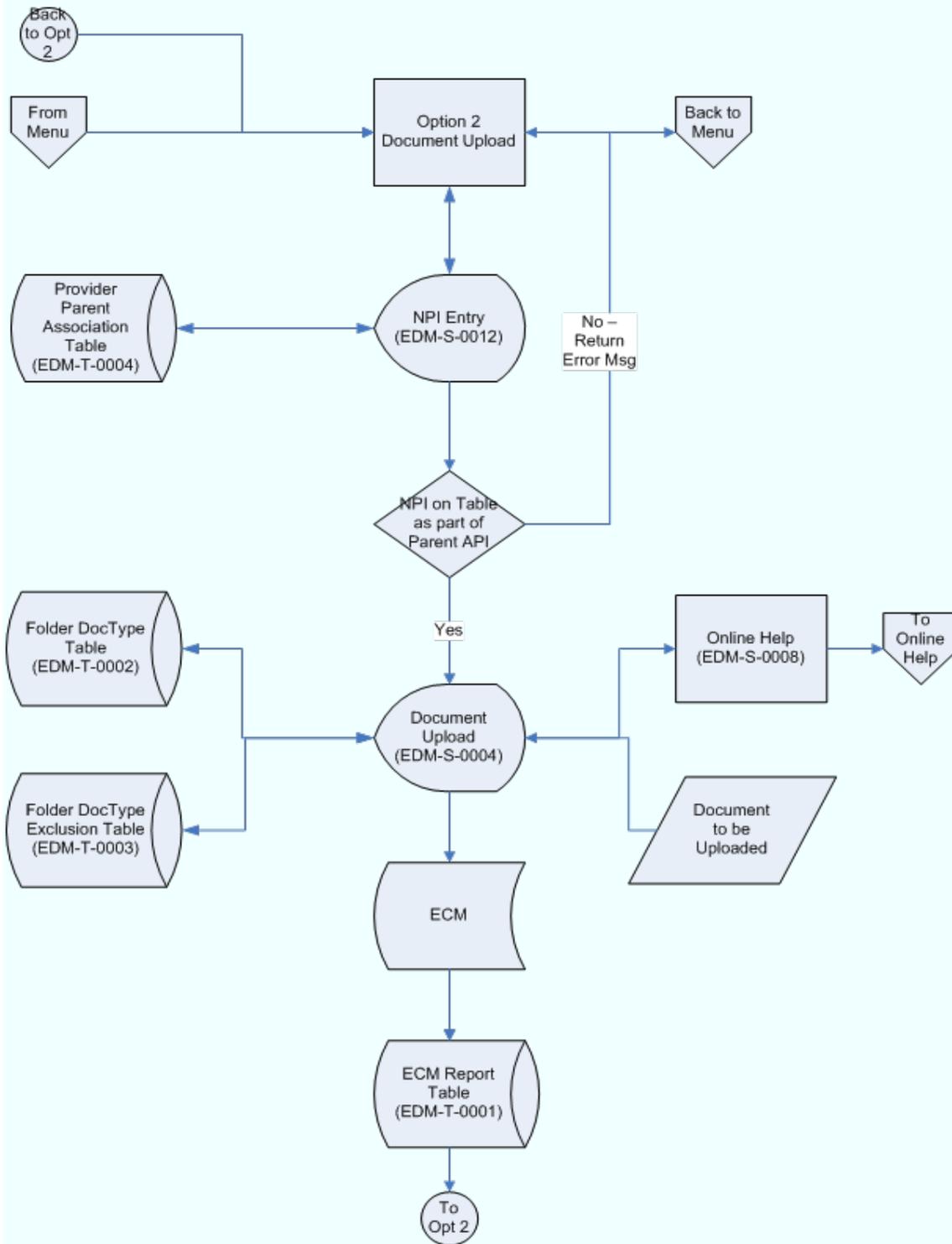
Parent Company Users – Option 1

Parent User – Option 1



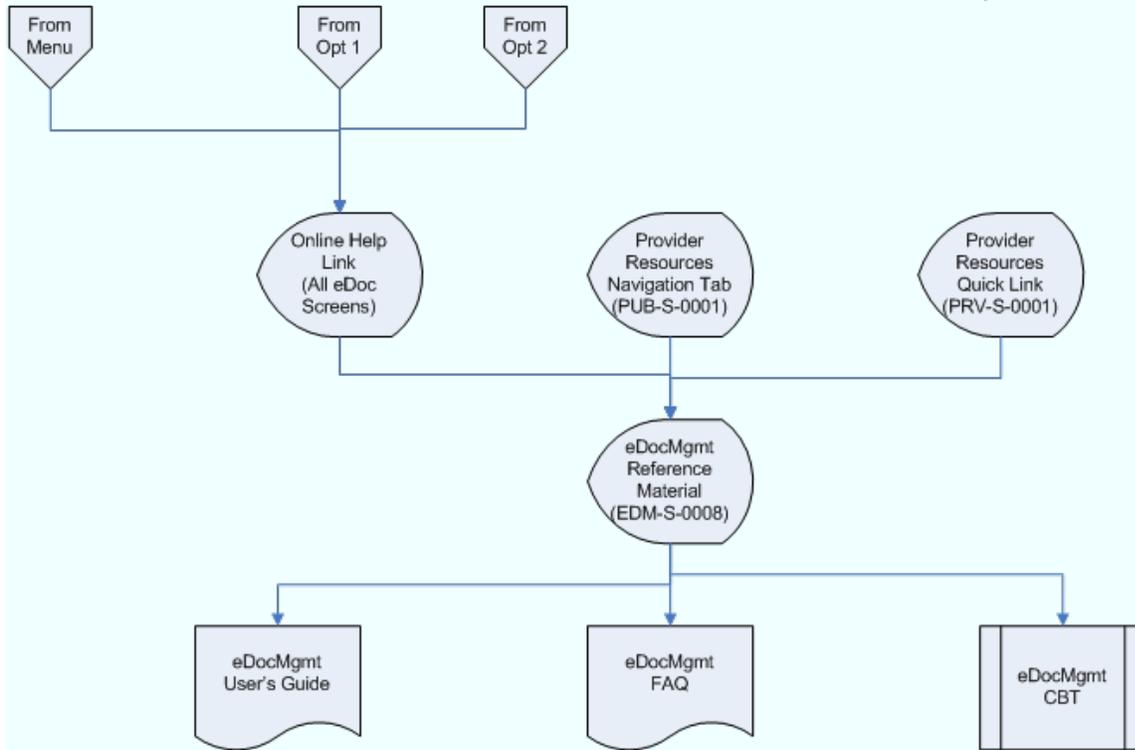
Parent Company Users – Option 2

Parent User – Option 2



Online Help

Online Help



Internal Users Flow

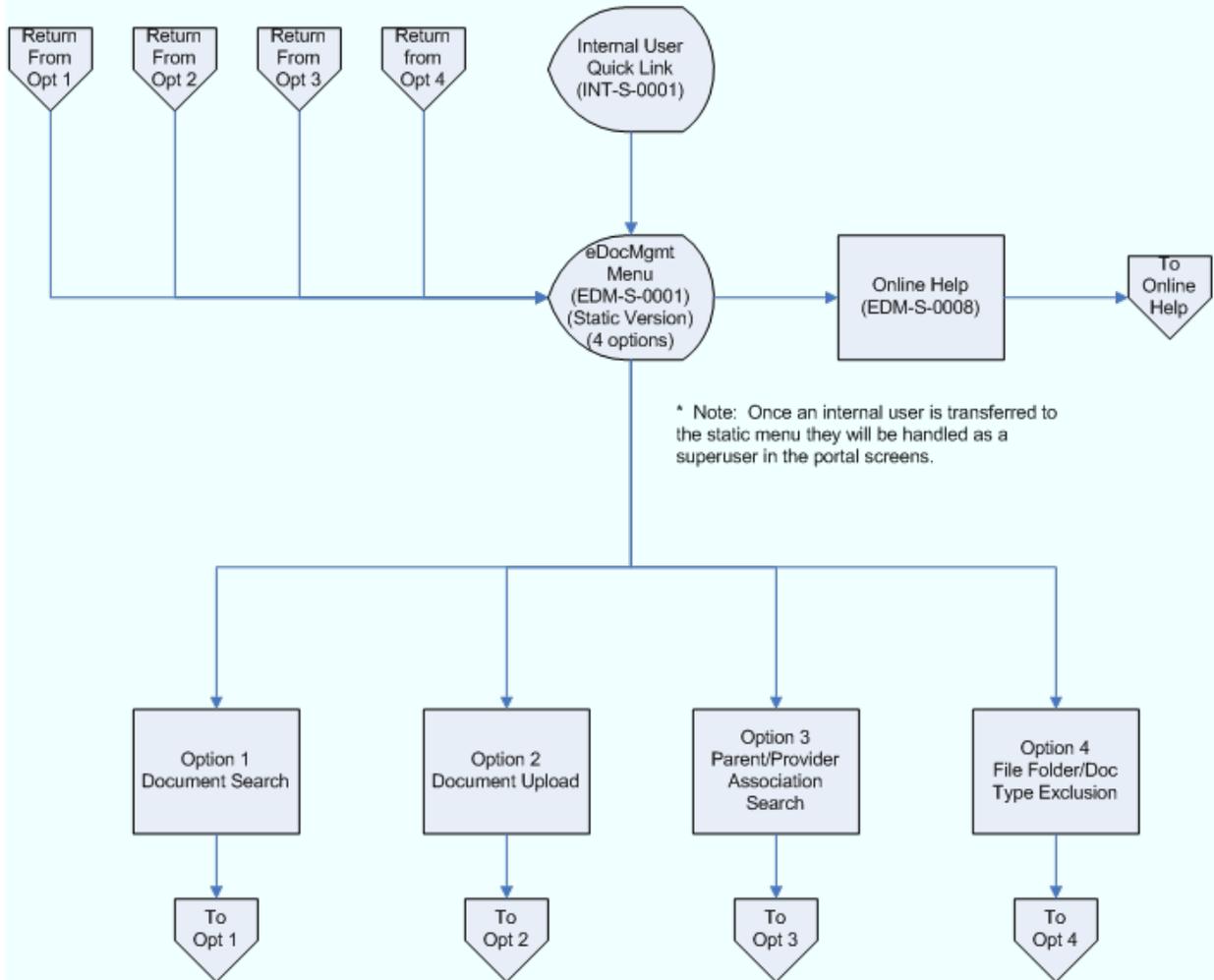
General Information

This is the flow of programs and screens that are utilized by the internal users (DMAS and Xerox). Users will have access to search, upload, Parent/Provider Association and File Exclusion/Document Type Exclusion functionality. Internal users will have access to all provider and parent companies associated with eDocMgmt.

Process

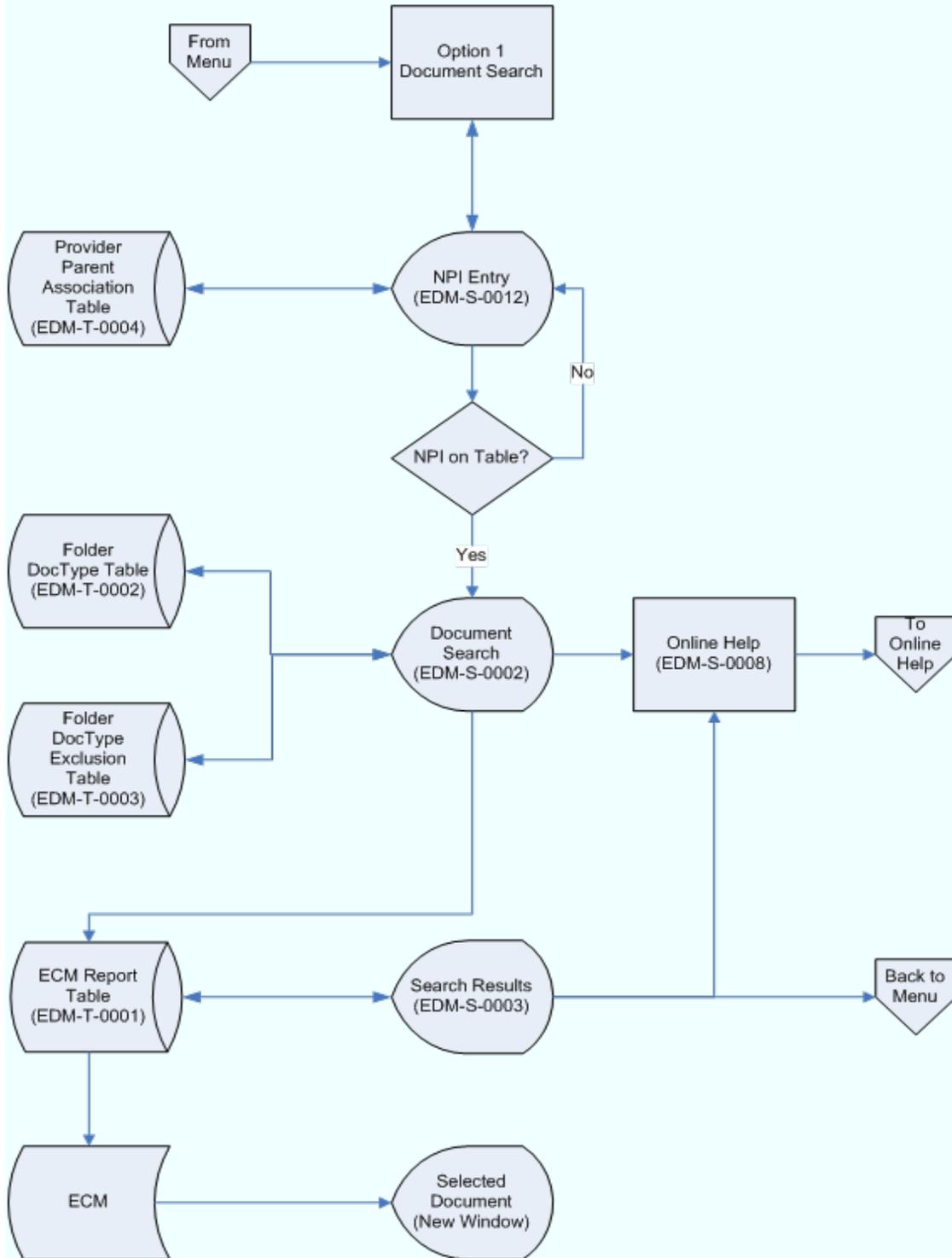
Internal Users – Menu

Internal User - Menu



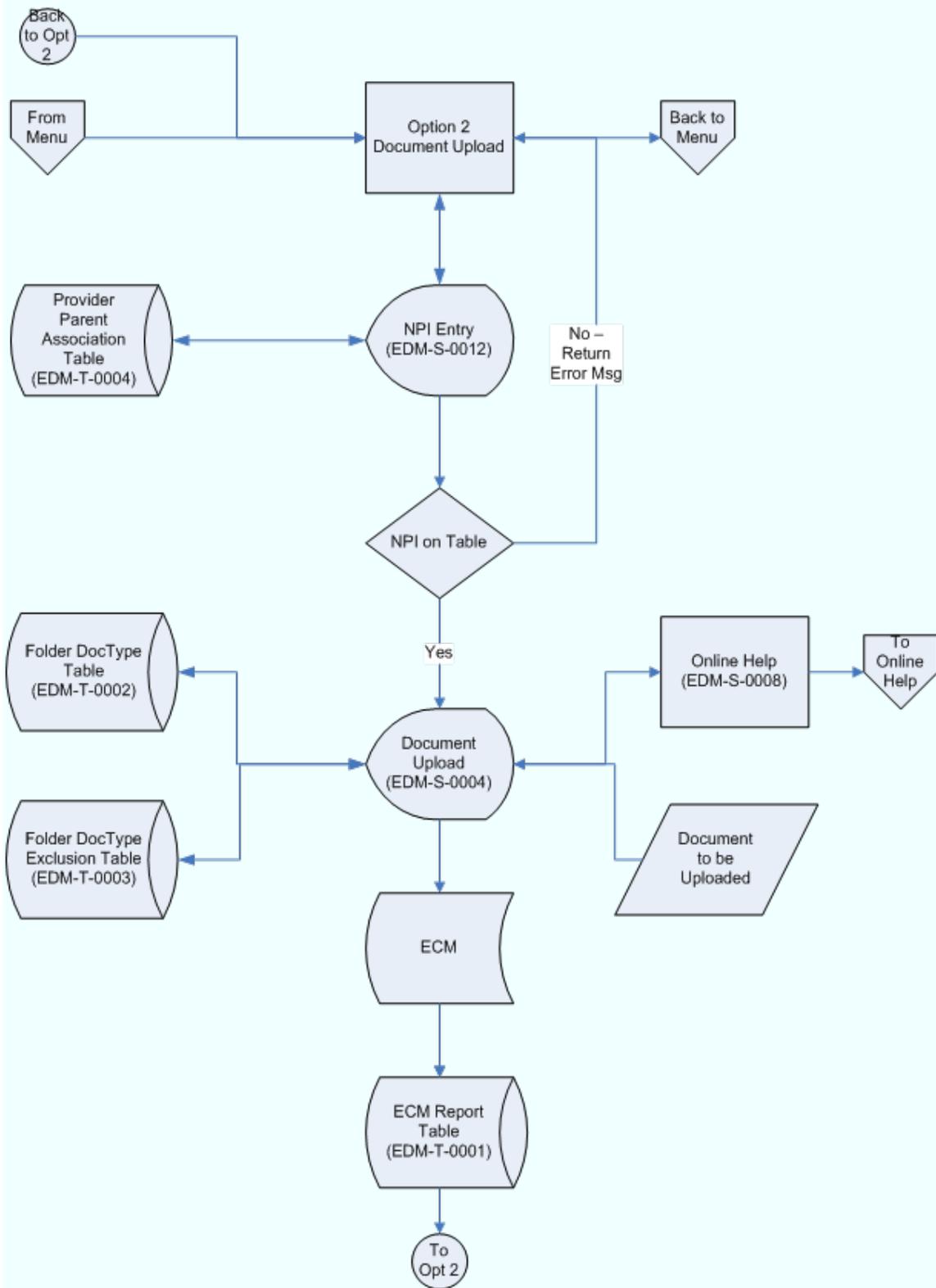
Internal Users – Option 1

Internal User – Option 1

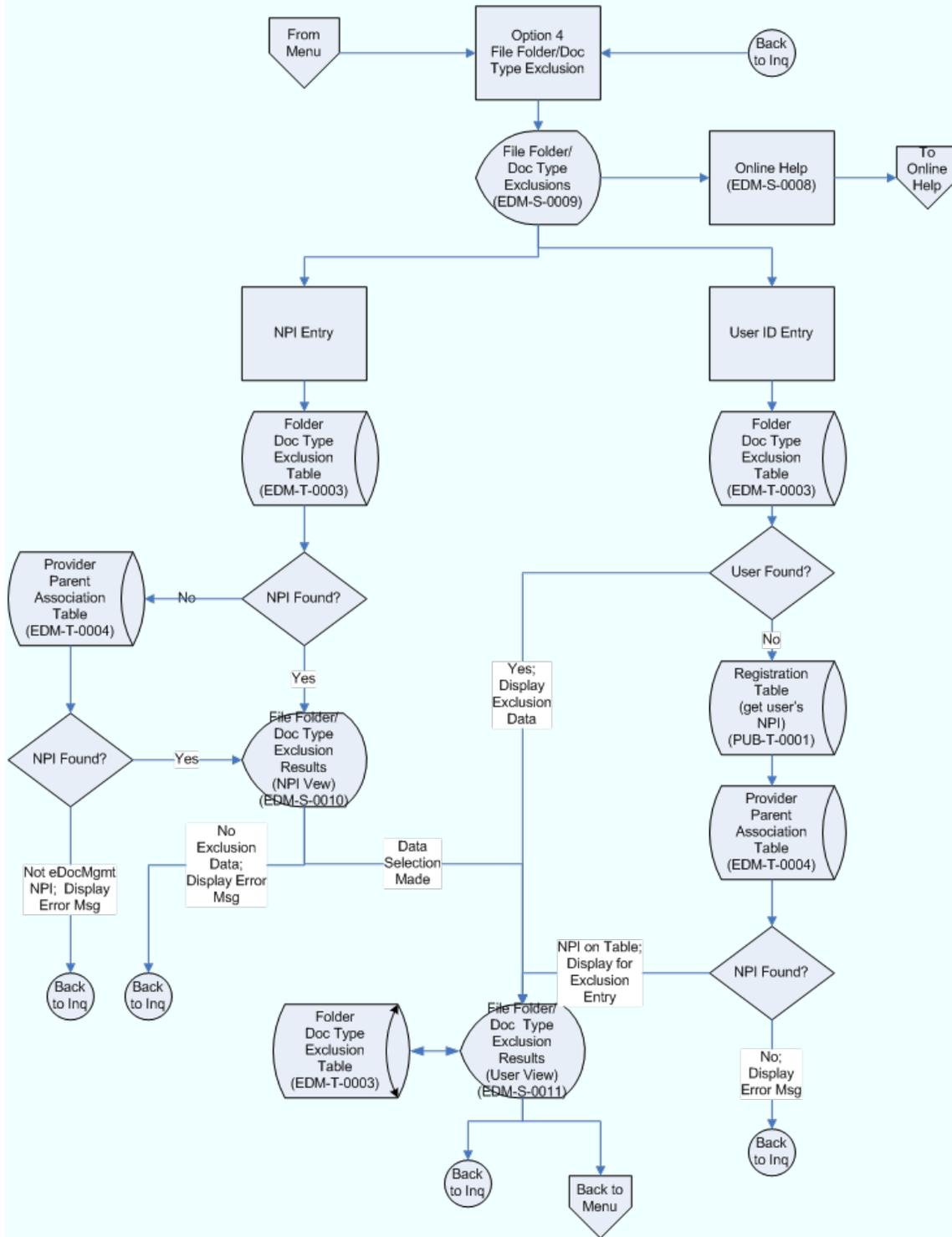


Internal Users – Option 2

Internal User – Option 2

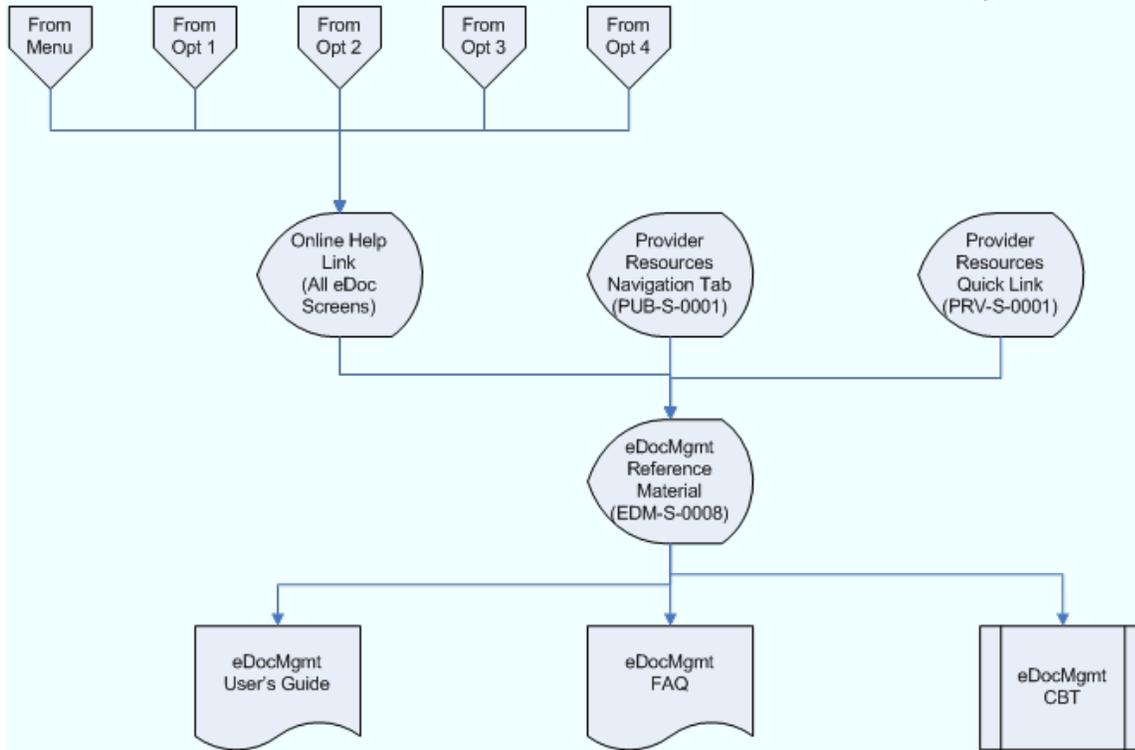


Internal User – Option 4



Online Help

Online Help



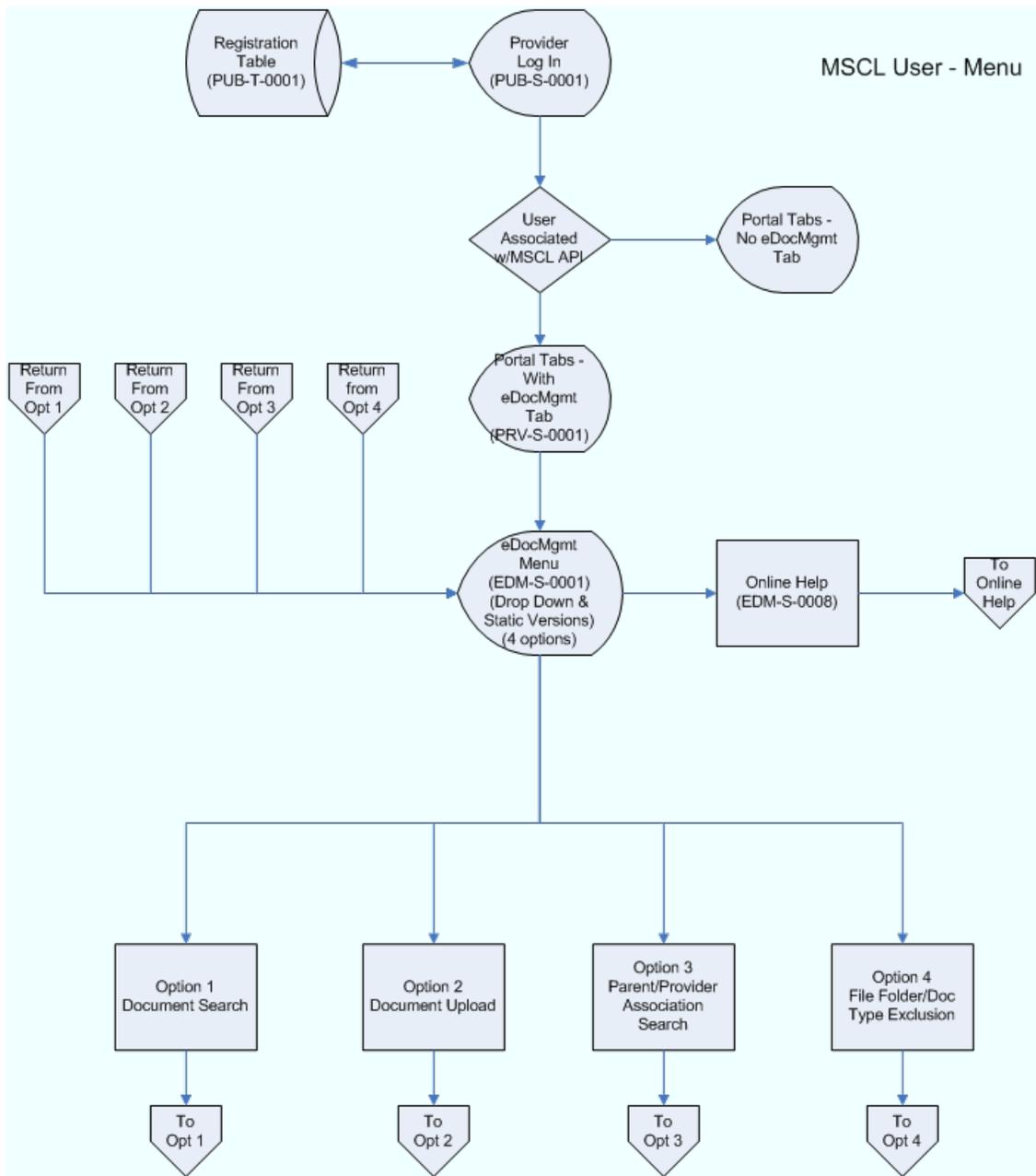
Myers & Stauffer, LC (MSLC) Users Flow

General Information

This is the flow of programs and screens that are utilized by the internal users (DMAS and Xerox). Users will have access to search, upload, Parent/Provider Association and File Exclusion/Document Type Exclusion functionality. Internal users will have access to all provider and parent companies associated with eDocMgmt.

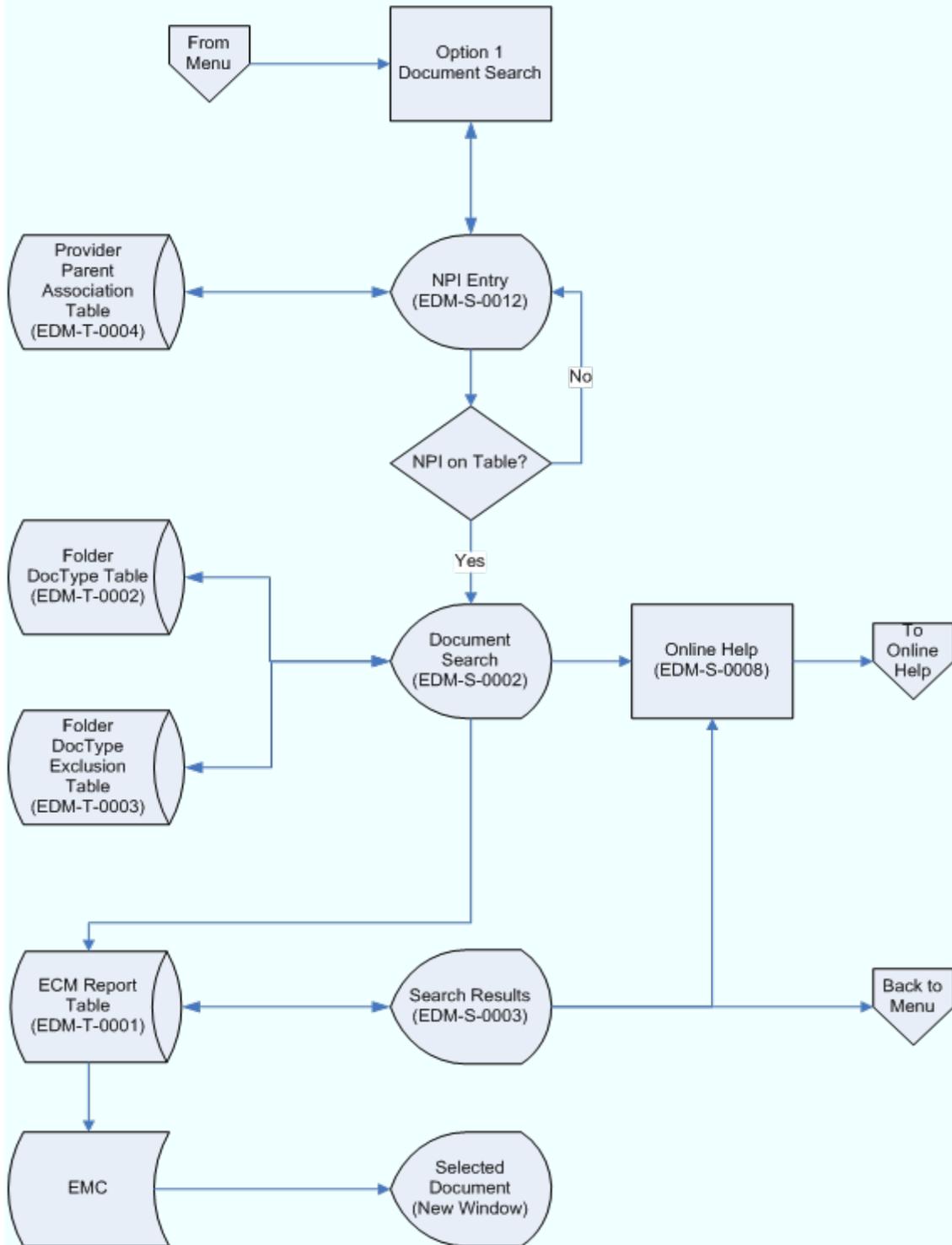
Process

MSLC Users – Menu



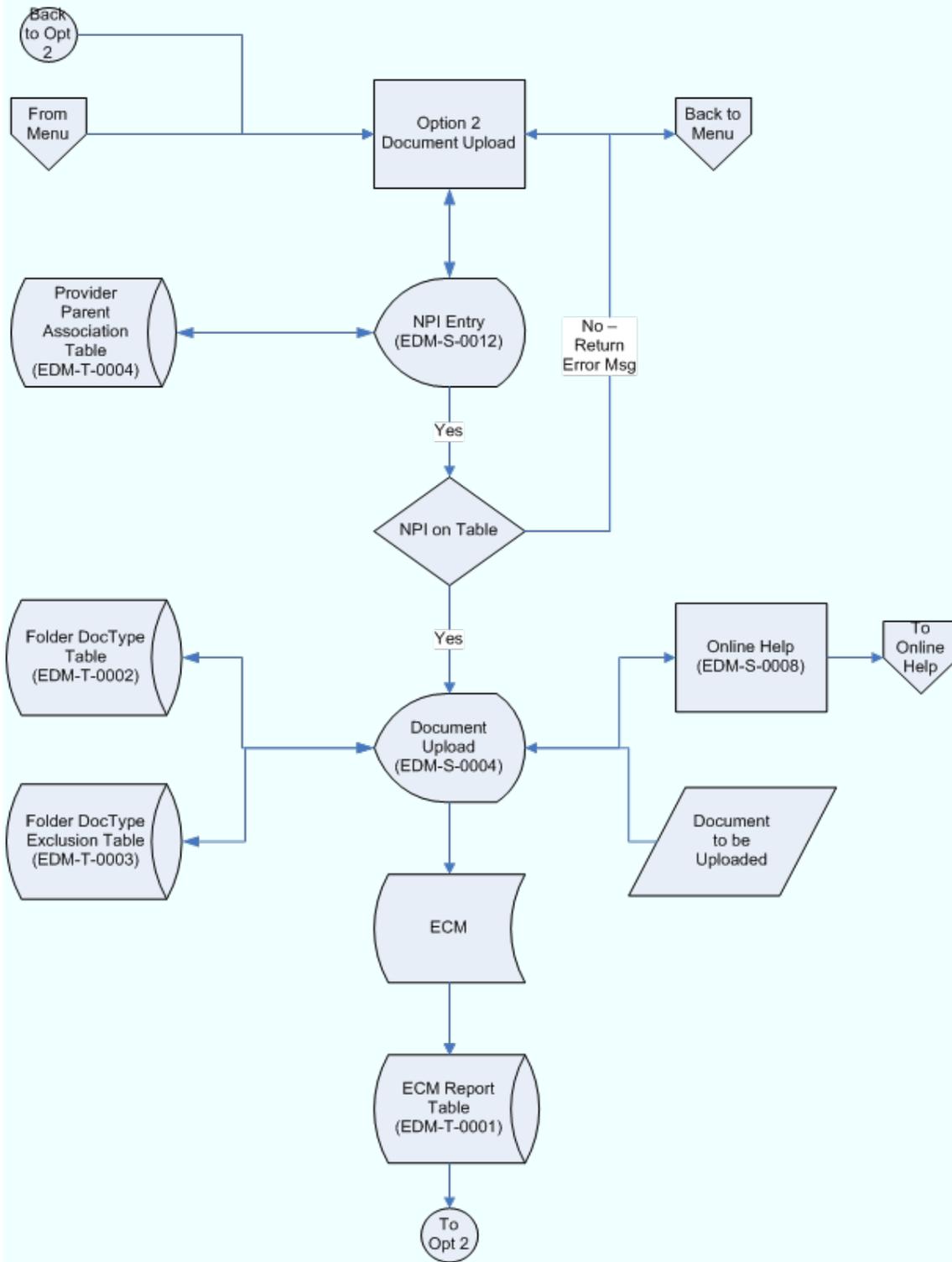
MSLC Users – Option 1

MSCL User – Option 1



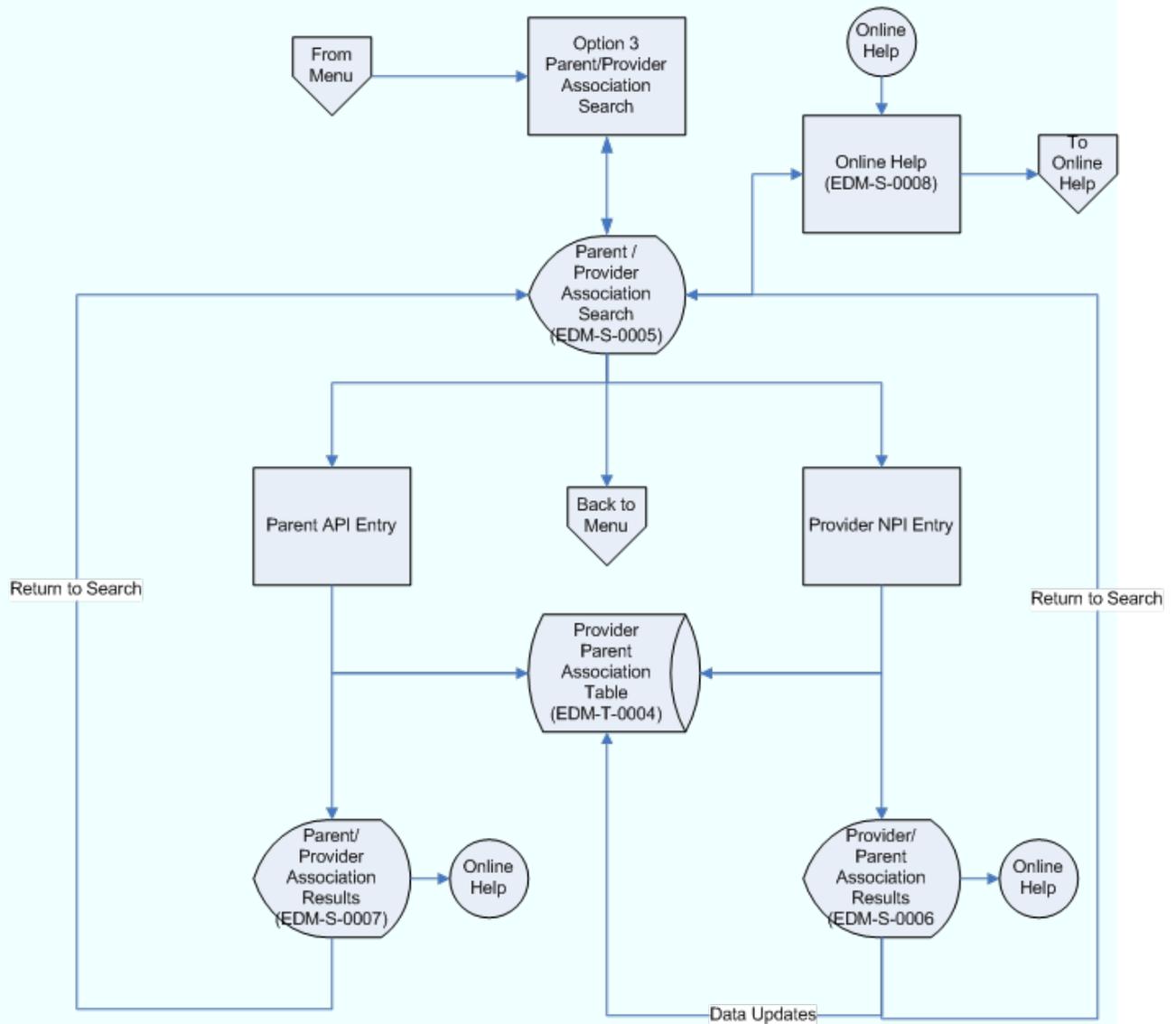
MSLC Users – Option 2

MSCL User – Option 2



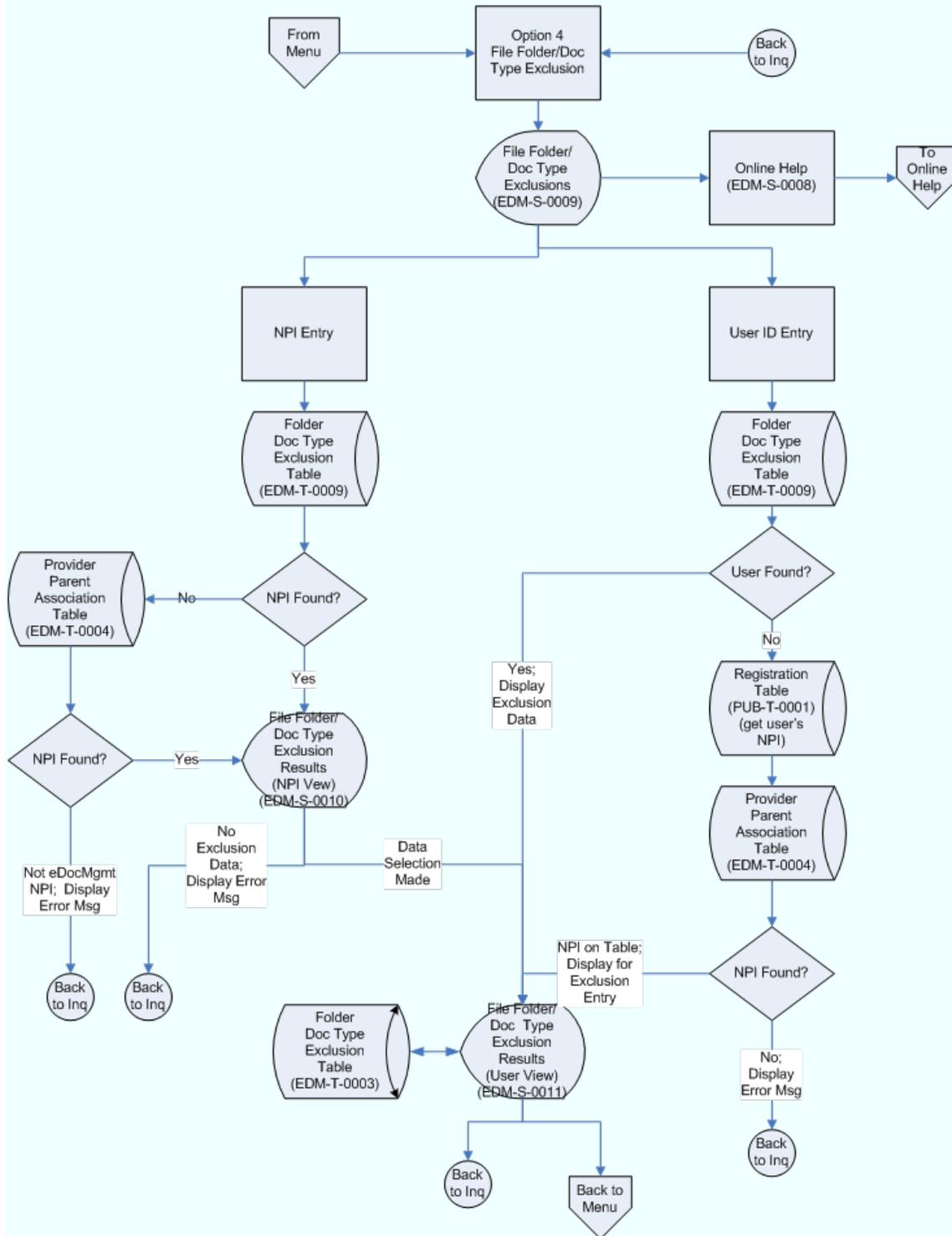
MSLC Users – Option 3

MSCL User – Option 3



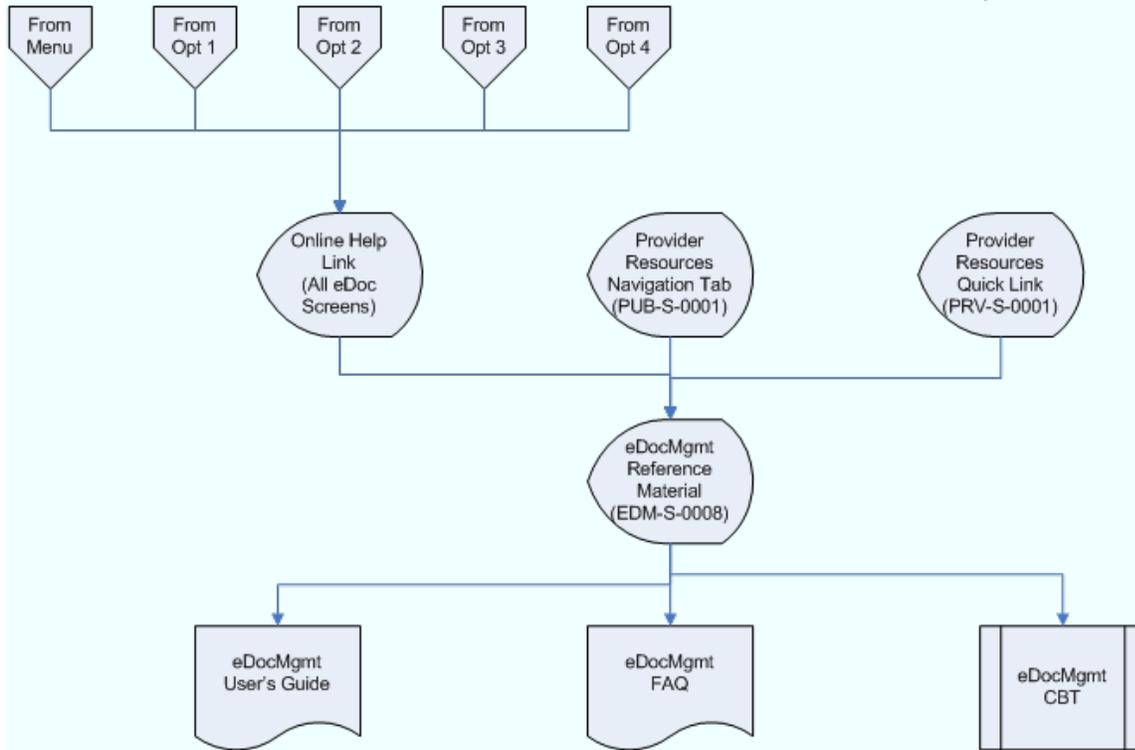
MSLC Users – Option 4

MSCL User – Option 4



Online Help

Online Help



Superuser Provider Flow

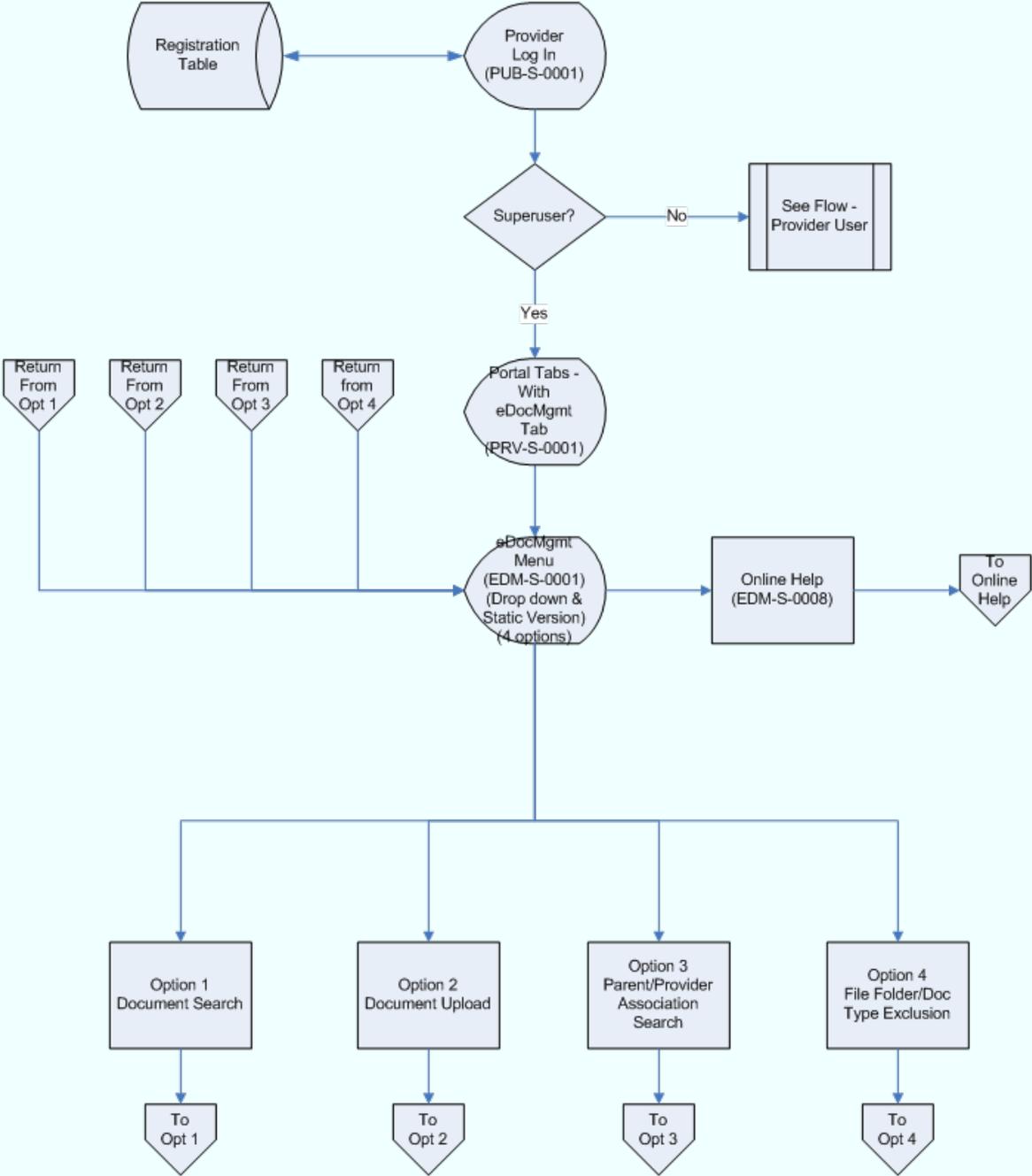
General Information

This is the flow of programs and screens that are utilized by the Provider Superuser. Users will have access to search, upload, Parent/Provider Association and File Exclusion/Document Type Exclusion functionality. Like Internal Users and MSLC users, Superusers will have access to all provider and parent companies associated with eDocMgmt.

Process

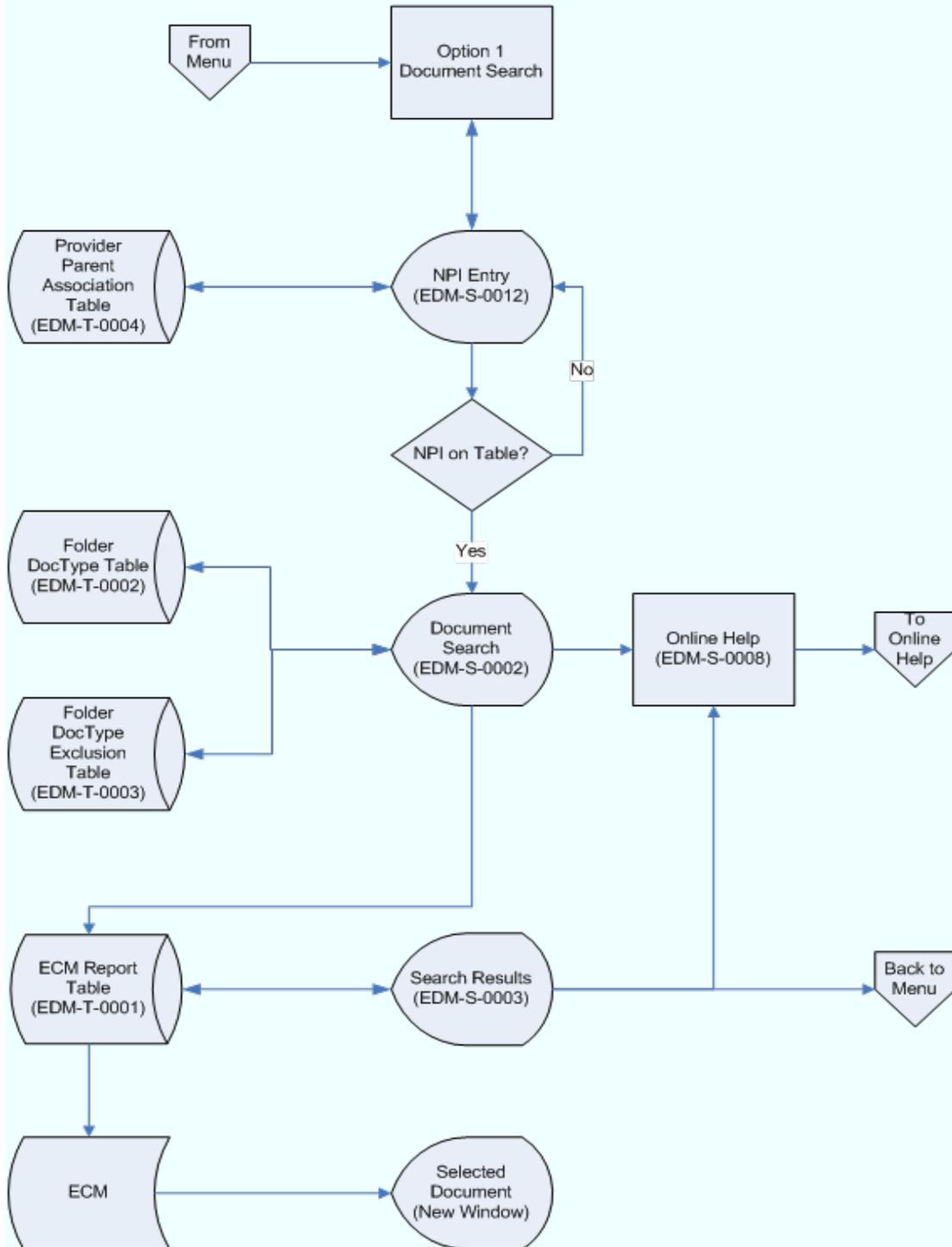
Superuser Provider - Menu

Superuser - Menu



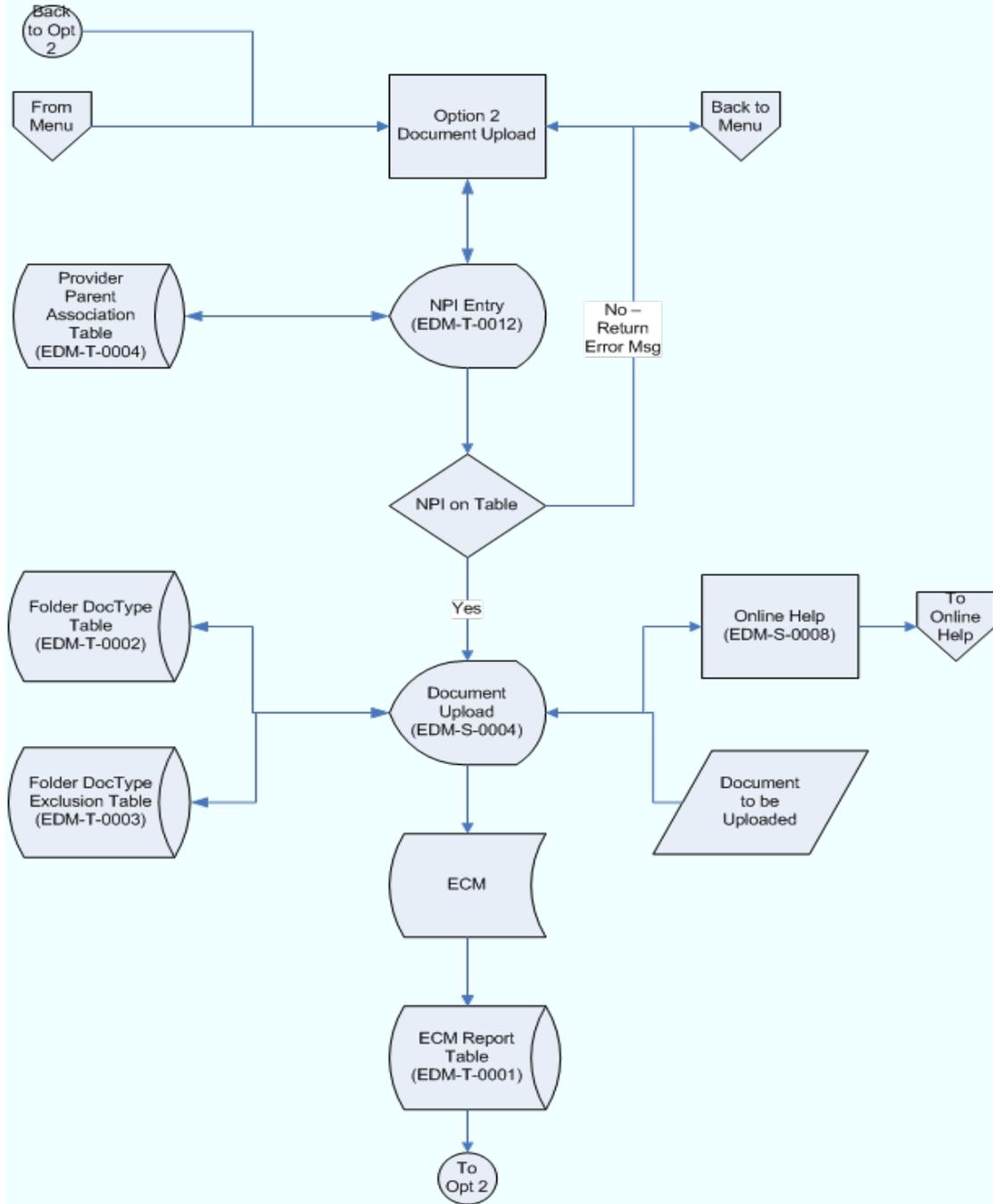
Superuser Provider – Option 1

Superuser – Option 1 (Same as Internal User)



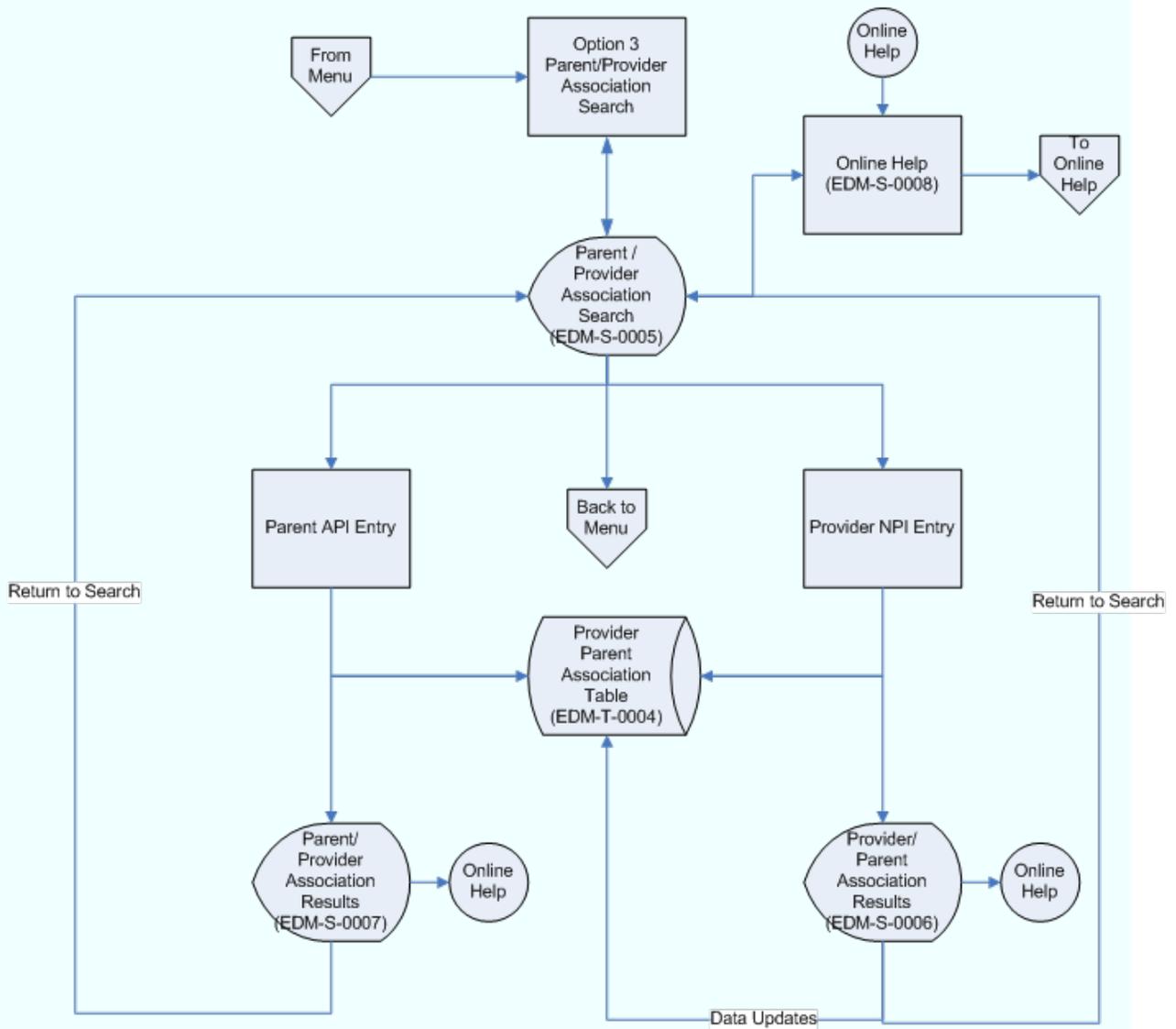
Superuser Provider – Option 2

Superuser – Option 2 (Same as Internal User)



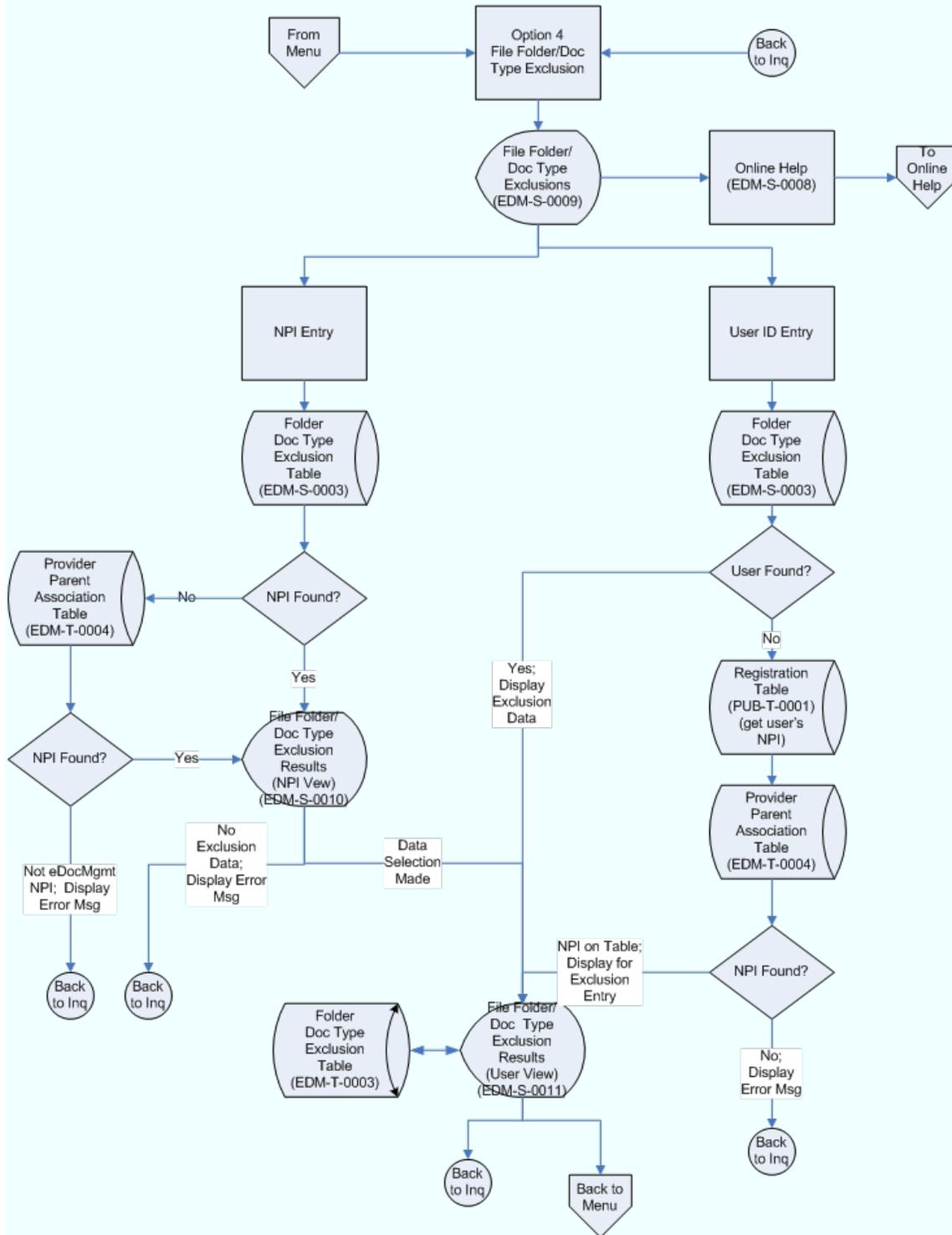
Superuser Provider – Option 3

Superuser – Option 3 (Same as Internal User)



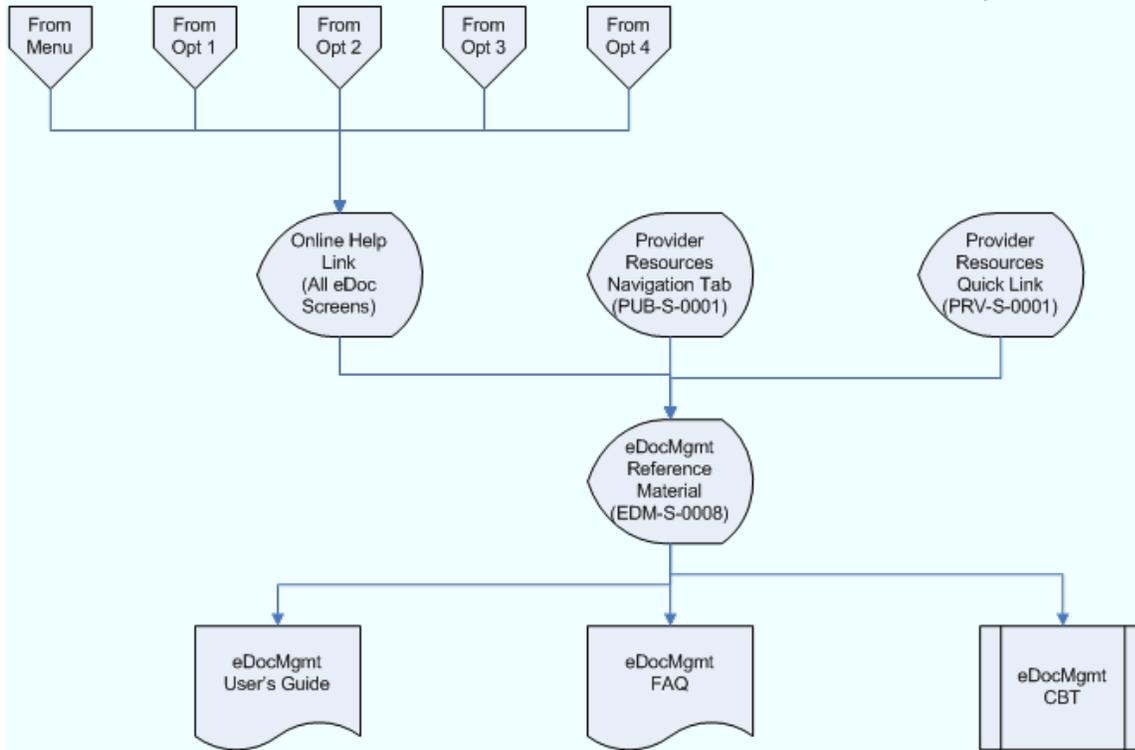
Superuser Provider – Option 4

Superuser – Option 4 (Same as Internal User)



Online Help

Online Help



Screens

- eDocMgmt Menu (EDM-S-0001)
- eDocMgmt – Document Search (EDM-S-0002)
- eDocMgmt – Document Search Results (EDM-S-0003)
- eDocMgmt – Document Upload (EDM-S-0004)
- eDocMgmt – Parent/Provider Association Search (EDM-S-0005)
- eDocMgmt – Provider/Parent Association Results (EDM-S-0006)
- eDocMgmt – Parent/Provider Association Results (EDM-S-0007)
- eDocMgmt – Reference Material (EDM-S-0008)
- eDocMgmt – File Folder/Doc Type Exclusion (EDM-S-0009)
- eDocMgmt – File Folder/Doc Type Exclusion Results (NPI View) (EDM-S-0010)
- eDocMgmt – File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011)
- eDocMgmt – NPI Selection (EDM-S-0012)

Additional screen updates have been made to the following screens in the associated system documentation:

- Internal User – Home Page (INT-S-0001)
 - Internal User System Documentation
- Secured Provider – Home Page (PRV-S-0001)
 - Secured Provider System Documentation
- Public Portal – Home Page (PUB-S-0001)
 - Public Provider System Documentation
- Registration – Add New User (WPR-S-0008)
 - Web Portal Registration System Documentation
- Registration – View/Edit User (WPR-S-0009)
 - Web Portal Registration System Documentation

eDocMgmt Menu (EDM-S-0001)

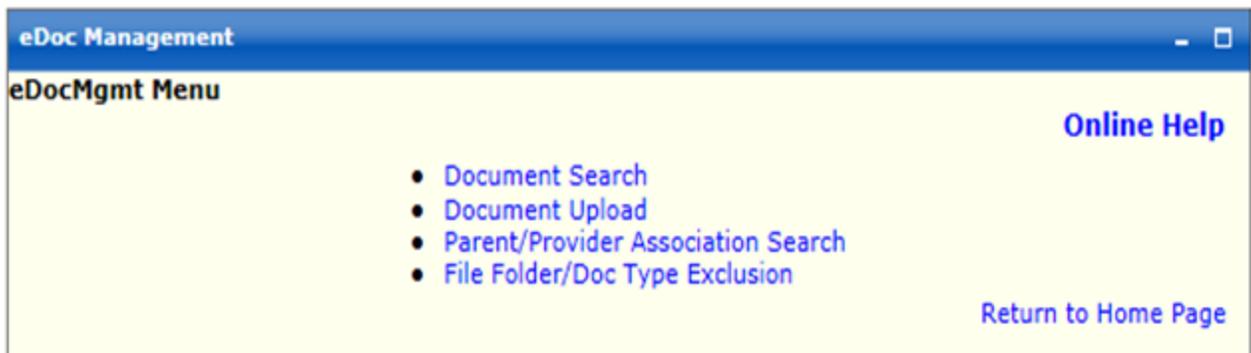
General Information

If a user wants to search for a document, upload a new one, check parent/provider association or file folder/doc type exclusion, this is the screen to initiate the selection.

This form consists of a series options.

Screen Name	eDocMgmt Menu
Source/Originator	Provider Portal Secured Welcome Page Internal User Secured Welcome Page
Usage	eDocMgmt functionality options

Screen Sample – EDM-S-001



Data Elements

Data Element Name (ID)	Instructions
N/A	

Navigation

Button/Link	Action	Link
Document Search	Navigates the user to the eDocMgmt Document Search screen	EDM-S-0002
Document Upload	Navigates the user to the eDocMgmt Document Upload screen	EDM-S-0004
Parent/Provider Association Search	Navigates the user to the eDocMgmt Parent/Provider Association Search screen	EDM-S-0005
File Folder/Doc Type Exclusion	Navigates the user to the eDocMgmt File Folder/Doc Type Exclusion screen	EDM-S-0009
Online Help	Navigates the user to the eDocMgmt Reference Material	EDM-S-0008
Return to Home Page	Returns the user to their respective secured home page, either Internal User or Provider	INT-S-0001 PRV-S-0001

Error Messages

Description	Resolution
N/A	

Access

This screen is accessed through the secured internal user or secured provider portal utilizing the 'eDocMgmt Menu' tab.

1. Log in to secured provider portal or secured internal user portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.

eDocMgmt Document Search (EDM-S-0002)

General Information

This screen will be the means for users to search for documents based on the user's security and access to file folder/document types.

The NPI/API will be a display field depending on the user's NPI/API. For internal users, superuser providers, MSLC users or Parent Company users, the entry from the NPI Selection screen (EDM-S-0012) will be displayed and disabled.

The Provider's Name will be retrieved from the Provider/Parent Association Table (EDM-T-0004) based on the selected NPI.

For Parent Company users, the Provider/Parent Association Table (EDM-T-0004) will be checked for the Parent API/NPI association. The Association Start Date will display in the Document Date > Than field. This field will be enterable but the user will not be able to change the date to one older. For example, if the Document Date > Than is 10/02/2015 (based on the Association Start Date), the user would not be able to enter a date of 10/01/2015 or older but could change it to 10/03/2015 or newer. This will ensure that the Parent Company user is not accessing documents that are prior to when the Parent/NPI association was established.

The Association End Date will be checked. If it's 12/31/9999, then no entry is displayed in the Document Date < Than field. If there's an Association End Date other than 12/31/9999, the date will be displayed in the Document Date < Than field. The field will be enterable but the user will not be able to change the date to a newer one. For example, the Document Date < Than is 10/02/2015 (based on the Association End Date), the user would not be able to enter a date of 10/03/2015 or newer but could change it to 10/01/2015 or older. This will ensure that the Parent Company user is not accessing documents that are after the Parent/NPI association was ended.

The Folder/ Doc Type Table (EDM-T-0002) will be read to establish the drop down list of File Folders. Internal Users, authorized MSLC users and superuser providers will see all file folder options. For all other users, before displaying the list, the Folder/Doc Type Exclusion Table (EDM-T-0003) will need to be read using the user's associated NPI and User ID. If the user is found on the table, any file folder exclusion with a doc type record of "All" associated with the NPI/User ID, will be removed from the drop down list.

Based on the selected File Folder, the Document Type drop down will be established. The Folder/Doc Type Table (EDM-T-0002) will be read using the selected File Folder to establish a drop down list containing the valid document types. Internal Users, authorized MSLC users and superuser providers will see all document types associated with the File Folder. For all other users, before displaying the list, the Folder/Doc Exclusion Type Table (EDM-T-0003) will need to be read using the

user's associated NPI, User ID and selected File Folder. If the user is found on the table, any file folder exclusion/doc type records will be removed from the drop down list.

Screen Name	Document Search
Source/Originator	eDocMgmt Menu
Usage	Entry of document search criteria to retrieve documents.

Screen Sample – EDM-S-0002

Jan 26, 2016
[Test Environment](#) | [Home](#) | [Contact Us](#) | [Log out](#)

Home | Claims | Member | Service Authorization | Payment History | EHR Incentive Program | Provider Maintenance | Provider Enrollment | RA Messages
 Level of Care Review | Pre-Admission Screening | Provider Portal Secure Email | eDoc Management

Document Search

Document Search [Online Help](#)

NPI/API: * [Redacted]
 Provider Name: [Redacted]
 File Folder: * [Dropdown]
 Document Type * [Dropdown]

At least one of the following date entries is required:
 Document Date > Than: * [Date Picker]
 Document Date < Than: * [Date Picker]
 Fiscal Period End Date: * [Date Picker]

[Search] [Reset] [Cancel] [Back]

SEARCH RESULTS

NPI: [Redacted] Provider Name: [Redacted]
 File Folder: [Redacted] Doc Type: [Redacted]

Document Description	Document Date	Document Type	Type
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Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
NPI/API (pdE-0610)	The NPI or API associated with a provider or a parent company.

	This field is display only.
Provider Name (pdE-0011 & pdE-0012)	The name of the provider or parent company. This field is display only.
File Folder (PDE-1362)	Select the file folder associated with the desired document. This field is selectable.
Document Date (pdE-1358)	Enter optional date criteria for the desired document. Date must be in the format MM/DD/YYYY or utilize the calendar widget. These date field are enterable and at least one optional date selection is required.

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material screen.	EDM-S-0008
Search	Transfers the user to the eDocMgmt Search Results screen	EDM-S-0003
Reset	Activates the buttons for each form.	EDM-S-0002
Cancel	<p>Internal Users – navigates user to the eDocMgmt Menu – static menu screen.</p> <ul style="list-style-type: none"> Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu. <p>Providers, Parent companies, MSLC and superusers – navigates user back to the Secured Provider – Home Page screen.</p>	EDM-S-0001 PRV-S-0001

Error Messages

Description	Resolution
File Folder selection is required	Enter valid screening date in the format MM/DD/YYYY or MM-DD-YYYY
Document Type selection is required	Enter either a valid assessment or reassessment date in the format MM/DD/YYYY or MM-DD-YYYY
Invalid date entered. Date must be in MM/DD/YYYY format	Enter valid initial request date in the format MM/DD/YYYY or MM-DD-YYYY
Document Date > Than cannot be greater than the Document Date < Than	Enter valid date in the format MM/DD/YYYY or MM-DD-YYYY
At least one optional selection must be entered	Enter the member's last name.
Document Date cannot be prior to the Parent/NPI association start.	Enter the member's first name.
Invalid date entered. Date must be in MM/DD/YYYY format.	Enter member's social security number in the format 999999999 or 999-99-9999
At least one optional selection must be entered	Enter member's social security number in the format 999999999 or 999-99-9999
Invalid date entered. Date must be in MM/DD/YYYY format.	Enter the member's building number and street address.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'Document Search' option.
5. Document Search screen displays.

eDocMgmt – Document Search Results (EDM-S-0003)

General Information

This screen will display all the documents that meet the selection criteria submitted by the user from the eDocMgmt Document Search (EDM-S-0002) screen.

All documents stored in the ECM, converted from GoFileRoom, and all relevant documents (see Appendix C) added going forward, will be loaded to the new ECM Report Table (EDM-T-0001). Based on the User's NPI, File Folder and Doc Type selection and any optional dates entered, the associated documents will be retrieved and displayed on this screen. Since the user's security role and the exclusions associated with the user were used during the selection process, the documents displayed will only be those from File Folder/Doc Types the user is permitted to view. The ECM Report Table (EDM-T-0001) also contains an indicator if a document has been deleted. If a document is flagged as deleted, it will not display.

The user's associated/selected NPI and provider name will display, along with the selected File Folder and Document Type.

The Document Description will be retrieved from the ECM Report Table (EDM-T-0001). The description will be displayed as a hyperlink. If the hyperlink is triggered, the program will read the ECM Report Table (EDM-T-0001) and retrieve the ECM location associated to the document. The WebServices program (EDM-P-0001) will be triggered, passing the necessary data for the document's retrieval via the CFSL (Common FileNet Service Layer). (See Section 11. Apps for additional detail.) The returned document will open in a separate window for the user's review, printing or saving to a local machine. Note: Viewing and printing will be dependent on the user's software (i.e. if the user selects an Excel spreadsheet but does not have Microsoft Excel on their machine, it might not open correctly).

The Document Date will be display only and will reflect the date in the ECM Report Table (EDM-T-0001) associated to the document. This date will display in the MM/DD/YYYY format.

The Format field will display the format type from the ECM Report Table (EDM-T-0001) associated with the document.

Per GoFileRoom Training Guide, the only browser supported is IE and the following format types are used. eDocMgmt will support IE and those formats, at a minimum, as well:

- Word
- Excel
- PDF
- Txt

- Zip
- Pm
- 2540 Cost Report (extensions may vary i.e. 13a1)

For MSLC users, internal users or superuser providers, the delete column and associated button will also display. The Delete column will contain a checkbox associated with each document. If any of the delete checkboxes is checked, and the Delete button is clicked, a confirmation message would be engaged, giving the user the option of either cancelling and returning to the screen for correction, or confirming the delete. After confirmation, the associated document in the ECM Report Table (EDM-T-0001) will be flagged as delete. The screen will redisplay without the deleted documents.

Provider or Parent company users will not see the 'Del' column or the Delete button.

The screen will allow for paging if more than one page of data is available for display. Paging will be consistent with other portal pages including a counter (99 of 99) and << 1, 2, 3 >> paging.

If no results are found for the criteria entered, the user will receive an error message.

Screen Name	Document Search Results
Source/Originator	Document Search
Usage	Displays results of documents meeting the entered search criteria; From this screen the user can retrieve the document for viewing, updating, saving on their local drive and/or printing.

Screen Sample – EDM-S-0003



- [Home](#)
- [Claims](#)
- [Member](#)
- [Service Authorization](#)
- [Payment History](#)
- [EHR Incentive Program](#)
- [RA Messages](#)
- [Provider Maintenance](#)
- [Provider Enrollment](#)
- [Level of Care Review](#)
- [Pre-Admission Screening](#)
- [Provider Portal Secure Email](#)
- [eDOC Management](#)

Document Search

[Online Help](#)

NPI/API:

Provider Name:

File Folder:

Document Type:

At least one of the following date entries is required:

Document Date > Than:

Document Date < Than:

Fiscal Period End Date:

SEARCH RESULTS

NPI: 5000033759 Provider Name: COMMONWEALTH CARE
File Folder: Cost Report Filing PBP Doc Type: Cost Report

Document Description	Document Date	Fiscal Year	Document Type	Type	Delete
SIG PAGES	05/11/2013	12/31/2012	.pdf		<input type="checkbox"/>
287-05 MCR (1 OF 2)	05/11/2013	12/31/2012			<input type="checkbox"/>
287-05 PDF	04/11/2014	12/31/2013	.pdf		<input type="checkbox"/>
CR SIG PAGES	04/11/2014	12/31/2013	.pdf		<input type="checkbox"/>
CMS 287 (PDF) REVISED	05/17/2013	12/31/2012	.pdf		<input type="checkbox"/>
CMS 287 (MCR) REVISED	05/17/2013	12/31/2012			<input type="checkbox"/>
SIG PAGES	05/17/2013	12/31/2012	.pdf		<input type="checkbox"/>
287-05 MCR	04/11/2014	12/31/2013			<input type="checkbox"/>
287-05 PDF (2 OF 2)	05/11/2013	12/31/2012	.pdf		<input type="checkbox"/>
SIG PAGES	05/11/2012	12/31/2011	.pdf		<input type="checkbox"/>

1 - 10 of 12 [12 >>](#)

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
NPI/API (pdE-0610)	The 10-digit NPI/API associated with the user's ID or NPI/API selection entry. Display only.
NPI Name (pdE-0011 & pdE-0012)	The provider's organization name or first/last name associated with the user's ID or NPI/API selection entry. Display only.
File Folder (PDE-1362)	The file folder associated with the location where the eDocMgmt document is stored. Display only.
Document Type (PDE-1363)	The file folder/document type associated with the location where the eDocMgmt document is stored. Display only.
Document Description (pdE-1359)	The description associated with the location where the eDocMgmt document is stored. This field is a hyperlink and clicking it will retrieve the document from eDocMgmt for viewing, modifying, saving to the user's local drive and/or printing
Document Date (pdE-1358)	The date the document was initially uploaded into eDocMgmt (or GoFileRoom if a converted document). Display only.
Fiscal Period End Date (PDE-1364)	The fiscal period end date associated with the eDocMgmt document. Display only.
Format	This indicates the format type of the document. Display only
Delete Indicator (pdE-1360)	This field will display only for MSLC users, internal users and superuser providers. Parent company users and provider users will not see this column. If clicked a confirmation pop up will be triggered. <ul style="list-style-type: none"> • Confirmation pop-up – Confirm (button) – will process the deletes and redisplay the

	<p>search results without the deleted documents.</p> <ul style="list-style-type: none"> Confirmation pop-up – Cancel (button) – return the user back to the search results, as is. <p>This field is a checkbox indicating the document is to be removed from display on the Search Results. Note: No document is actually removed from eDocMgmt just flagged as deleted for no display.</p>
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Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material screen.	EDM-S-0008
Reset	Removes any data entered on the screen and lets the user re-enter.	EDM-S-0003
Delete	Triggers the deletion of any document with a checkbox in the Delete column. Once completed, a message will display and the screen results will rebuild without displaying any documents that were flagged for deletion.	EDM-S-0003
Paging	Displays the next set of document results.	EDM-S-0003

Error Messages

Description	Resolution
N/A	N/A

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'Document Search' option.
5. Document Search screen displays.
6. Enter desired search criteria and click 'Search' button.
7. Search Results screen will display with all documents that met the entered search criteria.

eDocMgmt – Document Upload (EDM-S-0004)

General Information

This screen will allow the users to upload documents to the ECM. Users that only have AuthStaff – eDoc - Inq or Restricted eDocMgmt access will not have access to this option from the eDocMgmt Menu screen (EDM-S-0001).

Users will leverage the 'Attachment' button in the same fashion as the attach function is used throughout the portal. Users will have access to their local drives to select the desired document for uploading. They will click 'Done' to attach the document to the page and display the name of the document on the screen (with the option to 'Remove' (via a hyperlink)).

The NPI will be a display field depending on the user's NPI. For internal users, superuser providers, MSLC users or Parent Company users, the entry from the NPI Selection screen (EDM-S-0012) will be displayed and disabled.

The Folder/Doc Type Table (EDM-T-0002) will be read to establish the drop down list of File Folders available to the user. Internal Users and superuser providers will see all file folder options.

For all other users, before displaying the list, the Folder/Doc Type Exclusion Table (EDM-T-0003) will need to be read using the user's associated NPI and User ID. If the user is found on the table, any file folder exclusion with a doc type record of "All" associated with the NPI/User ID; will be removed from the drop down list.

Based on the selected File Folder, the Document Type drop down will be established. The Folder/Doc Type Table (EDM-T-0002) will be read using the selected File Folder to establish a drop down list containing the valid document types. Internal Users and superuser providers will see all document types associated with the File Folder. For all other users, before displaying the list, the Folder/Doc Type Exclusion Table (EDM-T-0003) will need to be read using the user's associated NPI/ID and selected File Folder. If the user is found on the table, any file folder exclusion/doc types records will be removed from the drop down list.

The Document Description will be enterable and will be required.

The Fiscal End Date will be enterable and will be required. The date format for display and entry is MM/DD/YYYY. The calendar widget will also be available for the user to change the date.

Per GoFileRoom Training Guide the following format types are supported:

- Word
- Excel
- PDF

- Txt
- Zip
- Prn
- 2540 Cost Report (extensions may vary i.e. 13a1)

eDocMgmt will handle these, at a minimum, as well.

When all required data is entered, the user selects 'Upload'. A new WebServices program (EDM-P-0002) will be triggered, passing the necessary data for the document's storage, via the CFSL. (See Section 11. Apps for additional detail.) When the document is added to the ECM, the ECM Report Table (EDM-T-0001) will be updated with the document's information as well as the location of the document in ECM (for later retrieval). The user will receive a message when the document has been successfully added to the ECM and added to the table.

Screen Name	Document Upload
Source/Originator	eDocMgmt Menu
Usage	This screen will be used to upload documents in to eDocMgmt, assigning appropriate properties to the document for later search and retrieval.

Screen Sample – EDM-S-0004



- Home
- Claims >
- Member >
- Service Authorization >
- Payment History
- EHR Incentive Program
- RA Messages
- Provider Maintenance
- Provider Enrollment
- Level of Care Review >
- Pre-Admission Screening >
- Provider Portal Secure Email
- eDOC Management >

Document Upload

Document Upload [Online Help](#)

Click 'Browse' to select file to be uploaded, and click 'Upload'

Document: *

NPI/API: *

File Folder: *

Document Type: *

Document Description: *

Fiscal Period End Date: *

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
NPI/API (pdE-0610)	For all users, this field will be displayed and disabled. It will either be the NPI/API associated with the provider user or the NPI/API entered in the selection screen.

	This field is display only.
File Folder (PDE-1362)	Select the file folder the uploaded document is to be associated with. This field is selectable and required.
Doc Type (PDE-1363)	Select the document type associated to the selected file folder the uploaded document is to be associated with. This field is selectable and required.
Document Description (pdE-1359)	Enter a description for the document that will be used in the Document Search display. This field is enterable and required.
Fiscal Period End Date (PDE-1364)	The date is enterable, in the format MM/DD/YYYY or entered via the calendar widget. This field is enterable and required.

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008
Attachment	Activates the attachment process and displays the screen allowing the user to select a document from their local drive.	EDM-S-0004
Upload	Add document to ECM and add properties to the ECM Report Table (EDM-T-0001).	EDM-S-0004
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0004
Cancel	<ul style="list-style-type: none"> Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p>	EDM-S-0001, PRV-S-0001

	<ul style="list-style-type: none"> Providers, Parent companies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen. 	
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Error Messages

Description	Resolution
File Folder selection is required.	Select the appropriate file folder option from the drop down list.
Document Type selection is required.	Select the appropriate document type option, associated with the selected file folder option, from the drop down list.
Document description is required.	Enter the description to be associated with the document and will be used to display in the Document Search.
Invalid date entered. Date must be in MM/DD/YYYY format.	Enter valid date in the format MM/DD/YYYY or make a selection from the calendar widget.
Fiscal End Date is required. Date must be in MM/DD/YYYY format.	Enter valid date in the format MM/DD/YYYY or make a selection from the calendar widget.
Document must be attached to upload. Click 'Attachment' and add document.	Click 'Attachment' button, select desired document from the user's local drive.
Attached document has been successfully loaded to eDocMgmt.	No resolution needed; successful load message.
Attached document was not loaded to eDocMgmt. Please contact the Virginia Medicaid Web Support Helpdesk at 866-352-0496.	This usually indicates an issue loading the document to the database. User will need to contact the help desk who might need to contact development support.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.

3. eDocMgmt options display as drop down selections.
4. Select 'Document Upload' option.
5. Document Upload screen displays.

eDocMgmt – Parent/Provider Association Search (EDM-S-0005)

General Information

This screen is only available to the MSLC users, internal users and superuser providers. All other users will not have access to this option from the eDocMgmt Menu screen (EDM-S-0001).

Users are required to enter either the Parent API or the Non-Parent NPI for navigation to the appropriate results screen.

An entry to the Parent API will be validated for format and then used to call the Provider/Parent Association Table (EDM-T-0004). If the API is not found, the user will receive an error message. If API is found, user will be routed to the Parent/Provider Association Results screen (EDM-S-0007).

An entry to the Non-Parent NPI will be validated for format and then used to call the Provider/Parent Association Table (EDM-T-0004). If NPI is found for the current date, user will be routed to the Provider/Parent Association Results screen (EDM-S-0006).

If NPI is not found, user will receive a message asking if the NPI is to be added to eDocMgmt. A button titled 'Add NPI' will display for user to request addition.

If clicked, the program will call the MMIS DB2 Database (I_PROV_NPI) to validate the NPI exists, is active in the MMIS and is not Program 10 (or Program 12) only. If not found or inactive or only Program 10 (or Program 12), an error will display. If the NPI is found and active, a new record will be added to the Provider/Parent Association Table (EDM-T-0004). The MMIS DB2 Database (PS_NAME) will be called to retrieve the Provider Name for the record.

Update the rest of the record with the Associated Parent API and an Association Begin Date of the current date and an End Date of 12/31/9999. Once added the screen will redisplay with a message.

Note: New Parent companies can be added to the MMIS by Xerox as an API and then the Parent API will be added to the table. New Parent Companies can be added with an MSR.

Screen Name	Parent/Provider Association Search
Source/Originator	eDocMgmt Menu
Usage	This screen will be used to look for NPI's associated to a parent company API or to find a parent company that might be associated with an NPI.

Screen Sample – EDM-S-0005



Mar 1, 2016

[Home](#) | [Contact Us](#) | [Log out](#)



ParentProviderAssociationSearch

Parent/Provider Association Search

[Online Help](#)

Parent API: * OR Non-Parent NPI *

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
Parent API (pdE-0610)	For a list of NPIs associated with a parent company, enter the parent company's API. This field is enterable and at least one entry is required.
Non-Parent NPI (pdE-0610)	To find if an NPI is associated to a parent company, enter the individual provider's NPI.

	This field is enterable and at least one entry is required.
--	---

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008
Submit	<p>With Parent API entry</p> <ul style="list-style-type: none"> • Trigger validation edits and if successful transfer user to the Parent/Provider Association Results screen (EDM-S-0007). <p>With Non-Parent NPI entry</p> <ul style="list-style-type: none"> • Trigger validation edits and if successful transfer user to the Provider/Parent Association Results screen (EDM-S-0006). 	EDM-S-0007, EDM-S-0006
Add NPI (situational button)	Validate and add NPI to Provider/Parent Association Table (EDM-T-0004) and redisplay screen with message	EDM-S-0005
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0005
Cancel	<ul style="list-style-type: none"> • Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p> <ul style="list-style-type: none"> • Providers, Parent com- 	EDM-S-0001, PRV-S-0001

	panies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen.	
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Error Messages

Description	Resolution
Either the Parent API or Non-Parent NPI entry is required.	For a list of NPIs associated with a parent company, enter the parent company's API. To find if an NPI is associated to a parent company, enter the individual provider's NPI. One entry is required.
API is invalid. Please enter valid 10-digit API.	Enter a valid 10-digit API associated with one of the eDocMgmt parent companies or MSLC.
Parent API and Non-Parent NPI cannot both be entered. Please enter only one API/NPI entry.	For a list of NPIs associated with a parent company, enter the parent company's API. To find if an NPI is associated to a parent company, enter the individual provider's NPI. One entry is required.
Either the Parent API or Non-Parent NPI entry is required.	For a list of NPIs associated with a parent company, enter the parent company's API. To find if an NPI is associated to a parent company, enter the individual provider's NPI. One entry is required.
NPI is invalid. Please enter valid 10-digit NPI.	Enter valid 10-digit NPI associated with an active MMIS provider not program 10 or 12 only.
NPI is not part of eDocMgmt, click 'Add NPI' button to add provider.	NPI currently is not part of eDocMgmt. If the NPI is new and needs to be added to eDocMgmt, click the 'Add NPI'.
NPI currently does not exist on the MMIS and can't be added.	NPI to be added is not an enrolled NPI in the Medicaid system and can't be added to eDocMgmt.
NPI is currently inactive on the MMIS and can't be added.	NPI to be added is currently inactive in the Medicaid system and can't be added to eDocMgmt.

NPI is Program 10 and/or Program 12 only and can't be added.	NPI to be added is either Program 10 or Program 12 only and can't be added to eDocMgmt.
NPI has successfully been added to eDocMgmt.	NPI to be added has been validated against the MMIS and added to eDocMgmt.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'Parent/Provider Association Search' option.
5. Parent/Provider Association screen displays.

eDocMgmt – Provider/Parent Association Results (EDM-S-0006)

General Information

This screen will be display only. The Non-Parent NPI entered on the Provider/Parent Association Search screen (EDM-S-0005) is used to call the Provider/Parent Association Table (EDM-T-0004), along with the current date and return the associated Parent API and Parent Company Name (Provider Name).

If no Parent API is associated with this Non-Parent NPI for the current date, then this screen will display with no information in either the Parent API or the Parent Company Name along with an error message.

Screen Name	Provider/Parent Association Results
Source/Originator	Parent/Provider Association Search
Usage	This screen will display the entered NPI's current parent association

Screen Sample – EDM-S-0006

The screenshot displays the Virginia Medicaid eDocMgmt interface. At the top right, the date is Mar 1, 2016, and there are links for Home, Contact Us, and Log out. A navigation bar contains the following menu items: Home, Claims, Member, Service Authorization, Payment History, EHR Incentive Program, RA Messages, Provider Maintenance, and Provider Enrollment. Below this, a secondary bar includes Level of Care Review, Pre-Admission Screening, Provider Portal Secure Email, and eDOC Management. The main content area is a window titled 'ParentProviderAssociationSearch' with a yellow background. It displays the following information: 'Provider/Parent Association Results', 'Non-Parent NPI:1871574368', 'Parent API: 5000033163', and 'Parent Company Name:CARILLION HEALTH SYSTEM'. There is an 'Online Help' link and two buttons: 'Return to Search' and 'Cancel'.

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
Non-Parent NPI (pdE-0610)	The 10-digit numeric NPI entered in the search screen. This field is display only.
Parent API (pdE-0610)	The 10-digit numeric API representing the parent company associated with the NPI. This field is display only.
Parent Company Name (pdE-0011, pdE-0012)	The name of the parent company associated with the NPI. This field is display only.

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008
Return to Search Screen	Returns the user to the Parent/Provider Association Search screen.	EDM-S-0005
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0005
Cancel	<ul style="list-style-type: none"> Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p> <ul style="list-style-type: none"> Providers, Parent com- 	EDM-S-0001, PRV-S-0001

	panies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen.	
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Error Messages

Description	Resolution
NPI is not associated with a Parent Company.	Non-Parent NPI is found in the Provider/Parent Association Table (EDM-T-0004) but has no associated parent company on record.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'Parent/Provider Association Search' option.
5. Parent/Provider Association screen displays.
6. Enter Non-Parent NPI and select 'Submit'
7. Provider/Parent Association Results screen displays.

- eDocMgmt – Parent/Provider Association Results (EDM-S-0007)
- eDocMgmt – Reference Material (EDM-S-0008)
- eDocMgmt – File Folder/Doc Type Exclusion (EDM-S-0009)
- eDocMgmt – File Folder/Doc Type Exclusion Results (NPI View) (EDM-S-0010)
- eDocMgmt – File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011)
- eDocMgmt – NPI Selection (EDM-S-0012)

Additional screen updates have been made to the following screens in the associated system documentation:

- Internal User – Home Page (INT-S-0001)
 - Internal User System Documentation
- Secured Provider – Home Page (PRV-S-0001)
 - Secured Provider System Documentation
- Public Portal – Home Page (PUB-S-0001)
 - Public Provider System Documentation

- Registration – Add New User (WPR-S-0008)
 - Web Portal Registration System Documentation
- Registration – View/Edit User (WPR-S-0009)
 - Web Portal Registration System Documentation

eDocMgmt – Parent/Provider Association Results (EDM-S-0007)

General Information

This screen will only display to MSLC users, internal users and superuser providers. Access to the menu option's availability is controlled within eDocMgmt Menu (EDM-S-0001).

This screen displays any NPIs associated with the Parent API (in ascending numeric order) submitted on the Provider/Parent Association Search screen (EDM-S-0005).

The API entered is used to call the Provider/Parent Association Table (EDM-T-0004) and return any associated NPIs.

This screen will be divided into two sections. The first section will display existing NPIs associated with the API for the current date (using the Association Begin and End Dates).

Each NPI will be preceded by a checkbox to allow the user to select the NPI for deletion if it's no longer associated with the Parent API. The screen will allow for paging if more than one page of data is available for display. Paging will be consistent with other portal pages utilizing a counter (99 of 99) and << 1, 2, 3 >> paging.

The other half of the screen will display a row of enterable text boxes for the user to add any new NPIs that need to be associated with the Parent API. If more entries are needed, the user will need to click the 'Additional NPIs Needed' button to open up another row of text boxes.

If no NPIs are associated with this Parent API, then this screen will display with no information in the established NPI section, along with an error message. The Add section will be available to associate new NPIs.

When the 'Submit' button is clicked, the screen will be processed. If any of the delete checkboxes are checked, a confirmation message would be engaged, giving the user the option of either cancelling and returning to the screen for correction, or confirming the delete. After confirmation, the API/NPI association record in the Provider/Parent Association Table (EDM-T-0004) will be end dated. The Association End Date will be set to the previous date (current date minus one).

If any NPIs were added, and have cleared the field edits, then the Provider/Parent Association Table (EDM-T-0004) is called to see if the NPI is currently part of the eDocMgmt pool. If found, and the 'Associated Parent' field is blank, update the 'Associated Parent' field with the Parent API and make the Association Begin Date the current date and End Date 12/31/9999.

If the 'Associated Parent' API is already completed and the End Date is 12/31/9999, a confirmation message would be engaged, giving the user the option of either cancelling and returning to the screen for correction or confirming the change.

After confirmation, the End Date will need to be changed to the previous date (current date minus one) on the current Parent API. The NPI record will be replicated and the new Parent API added along with a Begin Date of the current date and an End Date of 12/31/9999.

If the NPI is not found on the Provider/Parent Association Table (EDM-T-0004), the program will call the MMIS DB2 Database (I_PROV_NPI) to validate the NPI exists, is active in the MMIS and is not Program 10 (or Program 12) only. If not found or inactive or only Program 10 (or Program 12), an error will display. If the NPI is found and active, a new record will be added to the Provider/Parent Association Table (EDM-T-0004). The MMIS DB2 Database (PS_NAME) will be called to retrieve the Provider Name for the record. Update the rest of the record with the Associated Parent API and an Association Begin Date of the current date and an End Date of 12/31/9999.

Once all NPI deletes have been processed and all new NPIs added, the screen will redisplay without the deleted NPIs and including the new NPIs that were added.

Screen Name	Parent/Provider Association Results
Source/Originator	Parent/Provider Association Search
Usage	This screen will display the NPI's associated to the entered parent company's API.

Screen Sample – EDM-S-0007



- Home
- Claims
- Member
- Service Authorization
- Payment History
- EHR Incentive Program
- RA Messages
- Provider Maintenance
- Provider Enrollment
- Level of Care Review
- Pre-Admission Screening
- Provider Portal Secure Email
- eDOC Management

Parent/ProviderAssociationSearch

Parent /Provider Association Results [Online Help](#)

Parent API:5000033759

Delete	Provider NPI
<input type="checkbox"/>	1285603142
<input type="checkbox"/>	1376622688
<input type="checkbox"/>	1497922843
<input type="checkbox"/>	1538473418
<input type="checkbox"/>	1609986744
<input type="checkbox"/>	1659340537
<input type="checkbox"/>	1689608473
<input type="checkbox"/>	1710256920
<input type="checkbox"/>	1710291679
<input type="checkbox"/>	1740241181

Showing 1 - 10 of 14 [1 2 Next](#)

NPIs to add:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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[Submit](#) [Return to Search](#) [Reset](#) [Cancel](#) [Additional NPIs needed](#)

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
Non-Parent NPI (pdE-0610)	The 10-digit numeric NPI entered in the search screen. This field is display only.
Parent API (pdE-0610)	The 10-digit numeric API representing the parent company associated with the NPI.

This field is display only.

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008
Delete (check box)	Clicking this and then hitting the submit button will start the delete process. Note: Delete doesn't physically remove the NPI just terminates the association to that parent company.	EDMS-S-0008
Additional NPIs Needed (button)	Opens another row of four text boxes for NPI entry.	EDM-S-0008
Submit (button)	<ul style="list-style-type: none">• Confirm deletion – upon confirmation; End Date the NPI on the Provider/Parent Association Table (EDM-T-0004).• Add – add the NPI to the Provider/Parent Association Table (EDM-T-0004).• Rebuild screen with deletions and additions processed.	EDM-S-0008
Return to Search Screen	Returns the user to the Parent/Provider Association Search screen.	EDM-S-0005
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0008
Cancel	<ul style="list-style-type: none">• Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user</p>	EDM-S-0001, PRV-S-0001

	<p>back to the static menu.</p> <ul style="list-style-type: none"> • Providers, Parent companies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen. 	
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Error Messages

Description	Resolution
No NPIs are currently associated with this Parent Company. Please enter any NPIs to be associated.	Parent company entered does not have any associated NPIs yet. Add NPIs in the Add section and submit.
NPI <#> is invalid. Please enter valid 10-digit numeric NPI.	Enter valid 10 digit numeric NPI
NPI is currently associated with a different parent company. Click 'Ok' to confirm the existing parent association should be ended and the new association added. Click 'Cancel' to return to the screen.	NPI requested for addition is currently part of another parent company. Confirm if that existing parent company association should be terminated.
NPI currently does not exist on the MMIS and can't be associated to this Parent Company.	NPI requested for addition is not currently enrolled with the MMIS so cannot be associated with a parent company.
NPI is currently inactive on the MMIS and can't be associated to this Parent Company.	NPI requested for addition is currently not active on the MMIS so cannot be associated with a parent company.
NPI is Program 10 and/or Program 12 only and can't be associated to this Parent Company.	NPI requested for addition is currently either Program 10 only or Program 12 only and therefore cannot be associated with a parent company.
No NPIs added; please enter NPIs and then request Additional NPIs Needed.	Additional NPIs Needed button was hit when current entry row still had available entries. Complete the available entries and then request additional if needed.
No deletes or additions to process. Please make necessary updates.	Submit button hit with no deletion or addition request. Enter any NPIs to be added or check any that need to be deleted and then hit 'Submit'.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'Parent/Provider Association Search' option.
5. Parent/Provider Association screen displays.
6. Enter Parent API and select 'Submit'.
7. Parent/Provider Association Results screen displays.

eDocMgmt – Reference Material (EDM-S-0008)

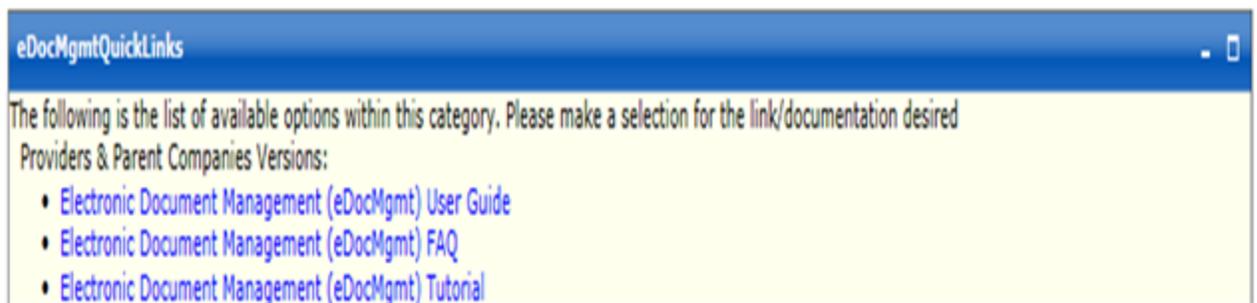
General Information

This screen will contain the reference material for the eDocMgmt functionality. The screen can be accessed via any of the following methods:

- Navigation Tab - Provider Resources >> Electronic Document Management (eDocMgmt)
- Quick Links - Provider Resources >> Electronic Document Management (eDocMgmt)
- eDocMgmt screens - Online Help link

Screen Name	Reference Material
Source/Originator	Provider Resources (navigation tab & Quick Links) All eDocMgmt online screens
Usage	This screen will have links to the eDocMgmt User Guide, the eDocMgmt FAQ and the eDocMgmt tutorial.

Screen Sample – EDM-S-0008



Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
N/A	N/A

Navigation

Button/Link	Action	Link
eDocMgmt User Guide	Opens the user guide in a new window to view, save and/or print	N/A
eDocMgmt FAQ	Opens the frequently asked questions in a new window to view, save and/or print	N/A
eDocMgmt Tutorial	Triggers the computer based training for eDocMgmt	N/A

Error Messages

Description	Resolution
N/A	N/A

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select any eDocMgmt option.
5. Screen displays.
6. Click 'Online Help' in the upper right corner of the screen.
7. eDocMgmt Reference Material screen displays.

eDocMgmt – File Folder/Doc Type Exclusion (EDM-S-0009)

General Information

This screen will only display to MSLC users, internal users and superuser providers. Access to the menu option's availability is controlled within eDocMgmt Menu (EDM-S-0001).

This screen will let the user request access to any exclusions associated with a user for review and/or updating. Exclusions are at the User ID level. From this screen, exclusions can be requested by a specific User ID or if the user's ID is unknown, by NPI to receive a list of users associated with the requested NPI.

To see all users with exclusions associated with a provider, enter the NPI.

To update exclusions for an existing user id with exclusions or to add a new user, enter the User ID.

If an NPI is entered, the program will call the Provider/Parent Association Table (EDM-T-0004) to ensure the NPI is part of eDocMgmt. If found the user will be transferred to the File Folder/Doc Type Exclusion Results (NPI View) (EDM-S-0010) screen. If not an error message will display.

If a User ID is entered, this program will call the Folder/ Doc Type Exclusion Table (EDM-T-0003) using that User ID. If records are found associated with this User ID, the user will be transferred to the File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011) screen.

If no records are found on the table, the program will call the Web Registration Table (PUB-T-0001) using the User ID entered. If User ID is found, has the appropriate eDocMgmt security (PAH, OrgAdmin, AuthStaff – eDoc – Inq or AuthStaff – eDoc – Upd and not restricted from eDocMgmt) the user will be transferred to the File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011) screen. If User ID is not found on the Web Registration Table (PUB-T-0001), or does not have the appropriate eDocMgmt security, an error message will display.

Screen Name	File Folder/Doc Type Exclusion
Source/Originator	eDocMgmt Menu
Usage	This screen will allow the user to enter a specific user id or an NPI for a list of user ids to exclusions.

Screen Sample – EDM-S-0009



[Home](#) | [Claims](#) | [Member](#) | [Service Authorization](#) | [Payment History](#) | [EHR Incentive Program](#) | [RA Messages](#) | [Provider Maintenance](#) | [Provider Enrollment](#)
[Level of Care Review](#) | [Pre-Admission Screening](#) | [Provider Portal Secure Email](#) | [eDOC Management](#)

File Folder/Doc Type Exclusion

File Folder/Doc Type Exclusion

[Online Help](#)

NPI: * OR User ID: *

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
NPI (pdE-0610)	The 10-digit numeric NPI/API entered in the search screen. Either this field or the User ID is required.
User ID (pdE-0006)	The User ID associated to the user whose exclusions need to be reviewed or who needs exclusions modified (added or deleted). Either this field or the NPI is required.

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008

Submit (button)	<ul style="list-style-type: none"> Process data and transfer user to File Folder/Doc Type Exclusion Results (NPI View) (EDM-S-0010) screen. Process data and transfer user to File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011) screen. 	EDM-S-0010; EDM-S-0011
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0009
Cancel	<ul style="list-style-type: none"> Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p> <ul style="list-style-type: none"> Providers, Parent companies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen. 	EDM-S-0001, PRV-S-0001

Error Messages

Description	Resolution
NPI or User ID entry is required.	Either the NPI or the User ID field must be entered when the 'Submit' button is clicked.
Both NPI and User ID cannot be entered. Please remove one entry.	Both the NPI and the User ID fields cannot be entered when the 'Submit' button is clicked.
NPI is invalid. Please enter valid 10-digit numeric NPI.	If NPI is entered, it must be 10-digit numeric
NPI is not part of eDocMgmt. Please add NPI via Provider/Parent Association Search	If NPI is entered, it needs to exist on the Provider/Parent Association Table (EDM-T-0004),

screen.	
User ID does not exist. Please enter valid User ID.	If User ID is entered, it needs to be found on either the Folder/ Doc Type Exclusion Table (EDM-T-0003) or the Web Registration Table (PUB-T-0001)
User ID does not have security for eDocMgmt. Please enter valid User ID.	If User ID is entered, is not found on the Folder/ Doc Type Exclusion Table (EDM-T-0003) but is on the Web Registration Table (PUB-T-0001), it needs to have the appropriate eDocMgmt security.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'File Exclusions/Doc Type Exclusion' option.
5. File Exclusions/Doc Type Exclusion' screen displays.

eDocMgmt – File Folder/Doc Type Exclusion Results (NPI View) (EDM-S-0010)

General Information

This screen can only be accessed from a validated selection made on the File Folder/Doc Type Exclusion screen (EDM-S-0009).

Any users, with appropriate eDocMgmt security, associated with the NPI will be listed.

The NPI entered from the File Folder/Doc Type Exclusion screen (EDM-S-0009) will display on this screen and is not enterable.

The program will use the NPI to call the Web Registration Table (PUB-T-0001). All users associated to this NPI with the appropriate eDocMgmt security (PAH, OrgAdmin, AuthStaff – eDoc – Inq or AuthStaff – eDoc – Upd and not restricted from eDocMgmt) will be displayed on the screen and will be available for exclusion modification.

Preceding each user row will be a checkbox to be used for selection. Even though it's a checkbox only one entry at a time will be allowed. If a second box is checked, the first will be removed.

If a selection is made and 'Submit' clicked, the user will be transferred to the File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011).

The screen will allow for paging if more than one page of data is available for display. Paging will be consistent with other portal pages utilizing a counter (99 of 99) and << 1, 2, 3 >> paging.

Screen Name	File Folder/Doc Type Exclusion Results (NPI View)
Source/Originator	File Folder/Doc Type Exclusion
Usage	This screen displays all the users currently associated with the entered NPI. From this screen the user can select the User ID they will to review and/or modify.

Screen Sample – EDM-S-0010



VAPProviderEODCFDocResultsNPView

File Folder/Doc Type Exclusion Results
(NPI Selection)

[Online Help](#)

NPI: * 1871574368

Select User ID for Exclusion Updates

Sel	User ID	Last Name	First Name
<input type="checkbox"/>	1871574368	Nemitz	Karen
<input type="checkbox"/>	bernde18	Bennett	Deborah
<input type="checkbox"/>	chappi18	Chappelle	Mickey
<input type="checkbox"/>	flemso18	Fleming	Soronya
<input type="checkbox"/>	jifountain	Fountain	Jill
<input type="checkbox"/>	lindadrye-2	Drye	Linda
<input type="checkbox"/>	modatr18	Modaniel	Tracy
<input type="checkbox"/>	mmdoylehall	DoyleHall	Mari
<input type="checkbox"/>	murray1	Murray	Bea
<input type="checkbox"/>	neigje18	Neighbors	Jennifer

1 - 10 of 12

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
NPI (pdE-0610)	The 10-digit numeric NPI/API entered in the exclusion request screen. This field is display only.
User ID (pdE-0006)	The User ID associated to each user part of the selected NPI organization. This field is display only.
User Last Name (pdE-0464)	The last name of the user associated with the selected NPI organization. This field is display only.
User First Name (pdE-0463)	The first name of the user associated with the selected NPI organization.

	This field is display only.
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Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008
Submit (button)	Process selection and transfer user to File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011) screen	EDM-S-0011
Return to Search (button)	Navigates the user back to the File Folder/Doc Type Exclusion screen (EDM-S-0009).	EDM-S-0009
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0010
Cancel	<ul style="list-style-type: none"> Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p> <ul style="list-style-type: none"> Providers, Parent companies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen. 	EDM-S-0001, PRV-S-0001

Error Messages

Description	Resolution
User selection is required.	A user selection must be checked when the 'Sub-

	mit' button is clicked.
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Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'File Exclusions/Doc Type Exclusion' option.
5. File Exclusions/Doc Type Exclusion' screen displays.
6. Enter NPI in 'NPI' entry, click 'Submit'.
7. File Exclusions/Doc Type Exclusion Results (NPI View) displays.

eDocMgmt – File Folder/Doc Type Exclusion Results (User View) (EDM-S-0011)

General Information

This screen can be accessed from a validated selection made on the File Folder/Doc Type Exclusion screen (EDM-S-0009) or from eDocMgmt – File Folder/Doc Type Exclusion Results (NPI View) (EDM-S-0010).

Any folder/doc type exclusions associated with the selected User ID will be listed.

The NPI, User ID, First Name and Last Name will be display only, populated from the File Folder-/Doc Type Exclusion Table (EDM-T-0003).

This screen will be divided into two sections. The first section will display existing file folder/ doc type combinations currently associated with the NPI/User ID. Records associated with the NPI/User ID will be retrieved from the File Folder/Doc Type Exclusion Table (EDM-T-0003). Each File Folder-/Doc Type exclusion row will be followed by a checkbox to allow the user to select the exclusion combination for deletion if it's no longer associated with the NPI/User ID.

The screen will allow for paging if more than one page of data is available for display. Paging will be consistent with other portal pages utilizing a counter (99 of 99) and << 1, 2, 3 >> paging.

The other half of the screen will display a row of selectable drop downs for the user to add any new exclusion combinations. All File Folder options will be included in the drop down list. The list will be built from the Folder/DocType Table (EDM-T-0002). Once the File Folder selection is made, the DocType drop down list will be generated from the Folder/DocType Table (EDM-T-0002) only with doc types associated with the selected folder. Each File Folder selection will also include a Doc Type of 'All' that can be chosen to exclude all document types associated with that Folder.

If more entries are needed, the user will need to click the 'Additional Exclusions Needed' button to open up another row of drop downs.

If no exclusion combinations are associated with this NPI/User ID, then this screen will display with no information in the established Exclusion section, along with an error message. The Add section will be available to associate new Folder/Doc Type Exclusions.

When the 'Submit' button is clicked, the screen will be processed. If any of the remove exclusion checkboxes are checked, a confirmation message would be engaged, giving the user the option of either cancelling and returning to the screen for correction, or confirming the delete. After con-

firmation, the exclusion combination record in the Folder/Doc Type Exclusion Table (EDM-T-0003) will be deleted.

If any exclusion combinations were added, then the Folder/Doc Type Exclusion Table (EDM-T-0003) is called to see if the folder/doc type exclusion already exists for this NPI/User ID. If found an error message will display.

Once all exclusion combination deletes have been processed and all new ones added, the screen will redisplay without the deleted combinations and including the new combinations that were added.

Screen Name	File Folder/Doc Type Exclusion Results (User View)
Source/Originator	File Folder/Doc Type Exclusion or File Folder/Doc Type Exclusion Results (NPI View)
Usage	This screen displays any File Folder and/or Doc Type Exclusions for the selected user. Users can also delete and/or add exclusions.

Screen Sample – EDM-S-0011

(PDE-1362)	to be excluded from. This field is display only in the existing exclusions section and a drop down selection in the addition section.
Doc Type (PDE-1363)	The File Folder/Doc Type name the user is excluded from or to be excluded from. This field is display only in the existing exclusions section and a drop down selection in the addition section.

Navigation

Button/Link	Action	Link
Online Help	Transfers the user to the eDocMgmt Reference Material (EDM-S-0008) screen	EDM-S-0008
Additional Exclusions Needed (button)	Opens another selection row with the file folder and document type drop downs.	EDM-S-0011
Submit (button)	Process selected exclusion combination removal requests and additions selections and rebuild the screen with deletions and additions applied.	EDM-S-0011
Return to Search (button)	Navigates the user back to the File Folder/Doc Type Exclusion screen (EDM-S-0009).	EDM-S-0009
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0010
Cancel	<ul style="list-style-type: none"> Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. <p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p> <ul style="list-style-type: none"> Providers, Parent com- 	EDM-S-0001, PRV-S-0001

	panies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen.	
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Error Messages

Description	Resolution
No Exclusion Combinations are currently associated with this User ID. Please select any that are to be associated.	If no exclusion combinations are currently associated with the NPI/User ID, the screen will display with no information but with the Exclusion addition section available.
File Folder/Doc Type combination currently exists. Please update selection or remove.	If an exclusion combination is entered, and already found on the Folder/ Doc Type Exclusion Table (EDM-T-0003) this message displays. User can make a different selection.
File Folder/Doc Type combination is required. Please select Doc Type.	A File Folder selection was made. A Doc Type selection is required and selection is needed.
No Exclusions added; please select exclusions and then request Additional Exclusions Needed.	Complete all open exclusion drop downs and if additions are still needed, select add exclusions button.
No deletes or additions to process. Please make necessary updates.	Submit clicked with no deletions or additions entered. Either select the File Folder/Doc Type exclusion to be removed or enter the File Folder/Doc Type combination to be added.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'File Exclusions/Doc Type Exclusion' option.
5. File Exclusions/Doc Type Exclusion' screen displays.
6. Enter NPI in 'NPI' entry, click 'Submit'.
7. File Exclusions/Doc Type Exclusion Results (NPI View) displays.
8. Select desired user to view and/or modify exclusions and click 'Submit'.
9. File Exclusions/Doc Type Exclusion Results (User View) displays.

eDocMgmt – NPI Selection (EDM-S-0012)

General Information

This screen is only used with internal users, superuser providers, users associated with a Parent Company API or MSLC API.

For option 1 or 2 (from eDocMgmt Menu (EDM-S-0001)), any of the above users will see the NPI selection before being routed to their selected option.

The NPI entry must be 10-digit numeric.

After entry, the NPI will be validated against the Provider/Parent Association Table (EDM- T-0004). For users associated with either a Parent API or MSLC API, the table will be called using the API/NPI combination. If no NPI exists on the table then there would be no documents in the ECM for eDocMgmt so an error will display. If API/NPI combination is found, the user will continue with the option selected using the NPI entered. Note: Users associated with Parent API/NPI combinations will continue with the option selected regardless of whether the Parent API/NPI association is no longer in effect.

Internal Users and superuser providers will call the table with the NPI only. If NPI does not exist on the table then there would not be any documents in the ECM for eDocMgmt so an error message will display. If NPI is found, the user will continue with the option selected using the NPI entered.

Screen Name	NPI Selection
Source/Originator	eDocMgmt Menu
Usage	This screen will precede the Document Search and Document Upload screens for parent company users, internal users, MSLC users and superusers. Users will enter the API/NPI they wish to search or upload for.

Screen Sample – EDM-S-0012



Home	Claims ▾	Member ▾	Service Authorization ▾	Payment History	EHR Incentive Program	RA Messages	Provider Maintenance	Provider Enrollment
Level of Care Review ▾	Pre-Admission Screening ▾	Provider Portal Secure Email	eDOC Management ▾					

VAProviderEDOCManagementSuperuser

Provide the NPI and click on submit button.

NPI/API*:

Data Elements

Note: For more detailed information on each of the data elements noted in the table below, please see Data Elements.

Data Element Name (ID)	Instructions
NPI/API (pdE-0610)	Enter the 10-digit numeric NPI/API to continue the Document Search or Document Upload for.

Navigation

Button/Link	Action	Link
Submit	Process data and navigate user to next screen (this screen used multiple places so navigation will be to continue with the option selected using the NPI entered).	EDM-S-0002 EDM-S-0003
Reset	Clears screen data, resets to defaults and remains on screen.	EDM-S-0012
Cancel	<ul style="list-style-type: none"> Internal Users – navigates user to the eDocMgmt Menu (EDM-S-0001) – static menu screen. 	EDM-S-0001, PRV-S-0001

	<p>Note: due to the risk of internal user log out once user is on the provider side of the portal, we will need to return the internal user back to the static menu.</p> <ul style="list-style-type: none"> Providers, Parent companies, MSLC and super-users – navigates user back to the Secured Provider – Home Page (PRV-S-0001) screen. 	
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Error Messages

Description	Resolution
NPI is invalid. Please enter valid 10-digit numeric NPI.	Enter valid 10-digit numeric NPI/API
Invalid NPI selection for user's organization. Please enter another NPI.	NPI selected is not associated with their parent company. Enter a new valid 10-digit numeric NPI/API.
NPI is not part of eDocMgmt. Please enter another NPI.	NPI selected is not within the eDocMgmt data. Enter a new valid 10-digit numeric NPI/API.

Access

This screen is accessed through the secured provider portal utilizing the 'eDoc Management' tab.

1. Log in to secured provider portal.
2. Hover over 'eDoc Management' navigation tab.
3. eDocMgmt options display as drop down selections.
4. Select 'Document Search' or 'Document Upload' option.
5. NPI Selection screen displays.

Tables – MMIS/DB2

Table Name	Description	Access
N/A	N/A	N/A

Tables – Portal

- ECM Report Table – WP_EDOC_RPT_TB (EDM-T-0001)
- Folder/Doc Type Table (EDM-T-0002)
- Folder/Doc Type Exclusion Table – WP_EDOC_EXCLSN_TB (EDM-T-0003)
- Provider/Parent Association Table – WP_EDOC_PROV_REL_TB (EDM-T-0004)

ECM Report Table – WP_EDOC_RPT_TB (EDM-T-0001)

General Information

The ECM Report Table houses the information associated with the eDocMgmt documents and their locations in ECM.

Data Elements

Data Element Name	Field Length	Description
WP_NPI_ID (pdE-0610)	10	NPI or API 10 digit numeric ID
WP_RPT_DESC (pdE-1359)	200	Document Description associated to the loaded document
WP_RPT_FILE_FLDR (PDE-1362)	50	File Folder document is stored under
WP_DOC_TYPE (PDE-1363)	50	Document Type associated with the File Folder the document is stored under
WP_RPT_DATE (pdE-1358)	10	Date the document was loaded to eDocMgmt
WP_FISC_YEAR (PDE-1364)	10	Fiscal period end date association with the document
WP_FILE_TYPE	10	Format type of the loaded document (i.e. .doc, .xls)
WP_FILE_NAME	200	Name of the uploaded document file
WP_RPT_GUID	50	Location of the stored document in ECM
WP_DEL_IND (pdE-1360)	1	Indication that document was deleted; this is for display purposes only no document is actually removed from ECM with this indication
G_AUD_ADD_USER_ID	30	User ID associated with the user who initially loaded the document;

		could be a system ID (i.e. for system generated reports); will not change once added
G_AUD_ADD_TS	6	Date/timestamp initial record was added; will not change once added
G_AUD_USER_ID	30	User ID associated with any modification of the record after the initial add.
G_AUD_TS	6	Date/timestamp associated with any modification of the record after the initial add.
WP_FILE_SIZE	10	Size of the stored document

Folder/Doc Type Table (EDM-T-0002)

General Information

The Folder/DocType Table was created for usage in the drop down lists and ensuring documents are associated with the correct folder/doc type. The file contains the following fields:

Data Elements

Data Element Name	Field Length	Description
File Folder	50	<p>Folder Description associated with report.</p> <p>Valid Values are:</p> <ul style="list-style-type: none"> • General Correspondence • Permanent • Cost Report Filing PBP • Field Audit PBP • Home Office PBP • PFA PBP • Reports PBDMAS • Cost Settlement PB Myers and Stauffer • Field Audit PB Myers and Stauffer • Home Office PB Myers and Stauffer • PFA PB Myers and Stauffer
Document Type	50	<p>Document Type Description associated with report</p> <p>Valid Values are (associated to Folder):</p> <ul style="list-style-type: none"> • All (indicates user is restricted from all doc types associated with the named folder) <p>General Correspondence</p> <ul style="list-style-type: none"> • Incoming • Outgoing <p>Permanent</p> <ul style="list-style-type: none"> • Articles of Incorporation • Board of Director Minutes

		<ul style="list-style-type: none"> • Chart of Accounts • Contracts • Corporate By-Laws • Equity Accounts and Ownership • Fixed Assets & Depreciation Schedules • Insurance • Leases • Legal and Capital Structure • Loans and L/T Debt Agreements • Operating/Partnership Agreement • Organizational Charts • Real Estate • Stock Book <p>Cost Report Filing PBP</p> <ul style="list-style-type: none"> • A-4 Support • A-6 Support • A-8 Support • Additional Requested Information • Audited Financial Statements • Cost Report • Cost Report Questionnaire • Fixed Asset Schedule • Grouping Schedule • Proof of Payment • Trial Balance • NF Wage Survey • FRV Reporting Form <p>Field Audit PBP</p> <ul style="list-style-type: none"> • General Ledger • Invoices • Workpapers <p>Home Office PBP</p> <ul style="list-style-type: none"> • Additional Requested Information • Audited Financial Statements • B-1 Support • C Support • Cost Report Questionnaire • Fixed Asset Schedule • Grouping Schedule • Home Office Cost Report • Trial Balance
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		<p>PFA PBP</p> <ul style="list-style-type: none"> • A/R Aging • Admissions Package • Bank Statements • DMAS 122 • GL Trial Balance • Petty Cash Reconciliation • PFA Account Bank Signature Card • PFA Account Reconciliation • PFA Quarterly Statement • PFA Trial Balance • Surety Bond <p>Reports PBDMAS</p> <ul style="list-style-type: none"> • Annual CMI Notification • Cost Report Settlement Data • ECR Data • Facility Case Mix • Resident Case Mix • Old ECR Versions • Patient Pay <p>Cost Settlement PB Myers and Stauffer</p> <ul style="list-style-type: none"> • Adjustment Report • Adjustment Report Workpapers • NPR Letter • Settled Cost Report • Settlement Summary • Transmittal Letter • FRV Annual Report <p>Field Audit PB Myers and Stauffer</p> <ul style="list-style-type: none"> • FAAR Supporting Workpapers • Field Audit Adjustment Report <p>Home Office PB Myers and Stauffer</p> <ul style="list-style-type: none"> • Adjustment Report • Adjustment Report Workpapers • NPR Letter • Settled Cost Report <p>PFA PB Myers and Stauffer</p> <ul style="list-style-type: none"> • Attachment A • Attachment B • Attachment C
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		<ul style="list-style-type: none">• Audit Report• Schedule A• Schedule B
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Folder/Doc Type Exclusion Table – WP_EDOC_EXCLSN_TB (EDM-T-0003)

General Information

The Folder/Doc Type Exclusion Table houses the information associated with any file folder/doc types exclusions assigned to a user.

Data Elements

Data Element Name	Field Length	Description
WP_EDOC_EXCLSN_SK	10	Exclusion Table Key
WP_NPI_ID (pdE-0610)	10	NPI or API 10 digit numeric ID
WP_USER_ID (pdE-0006)	30	The user id associated with the exclusion
WP_FIRST_NAME (pdE-0463)	30	The first name of the user associated with the exclusion
WP_LAST_NAME (pdE-0464)	20	The last name of the user associated with the exclusion
WP_FILE_FLDR (PDE-1362)	50	The File Folder the user is excluded from
WP_DOC_TYPE (PDE-1363)	50	The File Folder/Doc Type the user is excluded from
G_AUD_ADD_USER_ID	30	User ID associated with the user who initially loaded the document; could be a system ID (i.e. for system generated reports); will not change once added
G_AUD_ADD_TS	6	Date/timestamp initial record was added; will not change once added
G_AUD_USER_ID	30	User ID associated with any modification of the record after the initial add.
G_AUD_TS	6	Date/timestamp associated with any modification of the record after the initial add.

Provider/Parent Association Table – WP_EDOC_PROV_REL_TB (EDM-T-0004)

General Information

The Provider/Parent Association Table houses the information associated with each NPI and any parent company links.

Data Elements

Data Element Name	Field Length	Description
WP_NPI_ID (pdE-0610)	10	NPI or API 10 digit numeric ID
WP_NPI_NAME (pdE-0011, pdE-0012)	50	The NPI or parent company name
WP_PRNT_NPI (pdE-0463)	10	The parent company API associated with this NPI
WP_REL_BEGIN	10	The beginning date of the parent company association
WP_REL_END	10	The ending date of the parent company association
G_AUD_ADD_USER_ID	30	User ID associated with the user who initially loaded the document; could be a system ID (i.e. for system generated reports); will not change once added
G_AUD_ADD_TS	6	Date/timestamp initial record was added; will not change once added
G_AUD_USER_ID	30	User ID associated with any modification of the record after the initial add.
G_AUD_TS	6	Date/timestamp associated with any modification of the record after the initial add.