NHSC Site Administrator Portal User Guide



BCRS Management Information System Solution (BMISS)

NHSC Site Administrator Portal

User Guide

August, 2013



NHSC Site Administrator Portal User Guide

TABLE OF CONTENTS

Site Administrator Landing Page (Overview)	4
My Messages	5
Account Settings	5
NHSC Approved Sites	6
NHSC Inactive Sites	7
Pending Site Applications	8
Cancelling a Site Application or Recertification	8
My Activities	9
Need Assistance?	10
Update My Contact Information	10
Applying for a New NHSC Site	11
NHSC Site Eligibility Questions	12
General Site Information (1/6)	13
Application Points of Contact (2/6)	13
NHSC Information (3/6)	14
HPSA Score Suggestion (4/6)	15
Application Supporting Documents (5/6)	16
Application Site Agreement (6/6)	17
Site Information Landing Page (Overview)	18
Site Information	19
Contact Information	20
Additional Site Information	20
Self-Service	21
Recruitment Management (Manage Current Job Openings)	22
Create a New Position	23
View/Edit a Position	24

NHSC Site Administrator Portal User Guide

Closing a Position	24
Clinician Roster (View Clinician Roster)	25
Manage Points of Contact (POC)	26
Removing a POC	26
Adding a POC	27
Editing a POC	28
Manage Site Profile	29
Describe your site	30
Verify points of contact	30
Upload Brochure for your site	31
Provide Site Details	31
Provide Other Site Information	32
Manage Site Profile Images	32
Site Visits	33
Need Assistance? (Site Information Page)	34
Viewing Requests	34
Site Recertification	35
NHSC Site Eligibilty Questions	35
General Informaton (1/6)	36
Points of Contact (2/6)	36
NHSC Program Information (3/6)	37
HPSA Score Suggestion (4/6)	38
Supporting Documents (5/6)	39
Site Agreement (6/6)	40
Reapply	41
Ask a Question	42

SITE ADMINISTRATOR LANDING PAGE (OVERVIEW)

There are six main sections to the site administrator landing page:

1. My Messages (pg. 5) & Account Settings (pg. 5)

The site administrator can view messages sent from BCRS and update their account information.

2. NHSC Approved Sites (pg. 6)

If the site administrator is a recognized point of contact (POC) at an NHSC approved site, those sites will appear here. Clicking on the name of a site will open that site's information landing page (pg. 18).

3. NHSC Inactive Sites (pg. 7)

If the site administrator is a recognized POC at an NHSC inactive site, those sites will appear here. Clicking on that name of a site will open that site's information landing page (pg. 18).

4. Pending Site Applications (pg. 8)

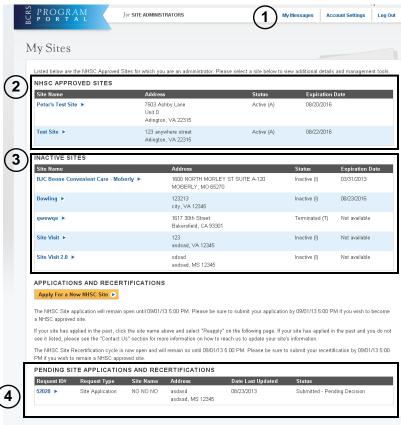
If the site administrator has either submitted an application for a site or is a POC at a site which has an application pending, those applications will appear here. Clicking on the ID will open that application.

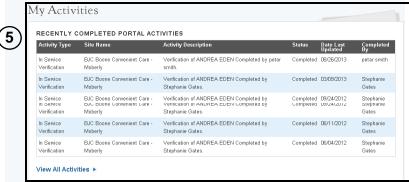
5. My Activities (pg. 9)

The site administrator can view recent activities he/she have completed.

6. Need Assistance? (pg. 10)

This section contains a number of tools for the site administrator as well as support contact information and a summary of all open requests.









NHSC Site Administrator Portal User Guide

MY MESSAGES

Selecting the "My Messages" link at the top of the landing page will open the site administrator's message inbox. The exclamation icon ($^{\bigcirc}$) next to the link indicates that a new message is available to view.



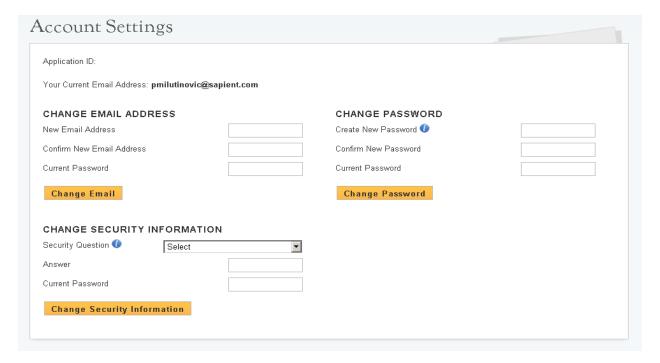
The inbox view includes the following information:

- 1. Status Indicates the status of the message, an exclamation point () indicates a new message.
- **2. Subject** the subject of the message.
- **3.** Date The date the message was received.

Selecting the subject of the message in the inbox opens the message for viewing.

ACCOUNT SETTINGS

The Account Settings page allows the site administrator to update security information as well as email and password information.





NHSC Site Administrator Portal User Guide

NHSC APPROVED SITES

The NHSC Approved Sites list contains all the NHSC sites that have the status of "active" that the site administrator is a point of contact at. If the site administrator feels that a site is missing from the NHSC Approved Sites list, please call 1-800-221-9393 for assistance. Clicking on a site's name in the table will open that site's specific site information landing page (pg. 18).

NHSC APPROVED SITES

Site Name	Address	Status	Expiration Date
Active Medical Site #1 🕞	123 Main Street Anytown, VA 555555555	Active (A)	08/23/2014
Active Medical Site #2 ▶	123 Main Street Anytown, VA 555555555	Active (A)	08/23/2014

The table includes the following information about approved sites:

- 1. Site Name this is the name of the site.
- 2. Site Address this is the physical address for the site (mailing address is stored separately).
- 3. Status for approved sites this is "active."
 "Active" sites are sites at which NHSC clinicians may serve and receive credit towards their service obligation.
- **4. Expiration Date** this is the date by which the site will need to recertify with the NHSC Past the expiration date, a site will become "inactive" until a recertification for that site is approved (see NHSC Inactive Sites for more information).



NHSC Site Administrator Portal User Guide

NHSC INACTIVE SITES

The NHSC Inactive Sites list contains all the NSHC sites that have the status of "inactive" and for which the site administrator is a point of contact. If the site administrator feels that a site is missing from the NHSC Inactive Sites list, please call 1-800-221-9393 for assistance. Clicking on a site's name in the table will open that site's specific site information landing page (pg. 18).

INACTIVE SITES

Site Name	Address	Status	Expiration Date
Inactive Medical Site #1 ()	123 Main Street Anytown, VA 555555555	Inactive (I)	08/23/2014
Inactive Medical Site #2 ▶	123 Main Street Anytown, VA 555555555	Inactive (I)	08/23/2014

The table includes the following information about "inactive" sites:

- 1. Site Name this is the name of the site.
- 2. Site Address this is the physical address for the site (mailing address is stored separately).
- 3. Status for approved sites this is "Inactive."

"Inactive" sites still appear in the NHSC database, but have the following restrictions.

- 1. NHSC Clinicians cannot receive credit for working at an "inactive" site.
- 2. "Inactive" sites may not post open positions to the Job Opportunities List.
- 4. Expiration Date this is the date by which the site will need to recertify with the NHSC.



NHSC Site Administrator Portal User Guide

PENDING SITE APPLICATIONS

The Pending Site Applications list contains all the NHSC applications either submitted by this site administrator or for sites for which this site administrator is a POC. If the site administrator feels that an application is missing from the site, please call 1-800-221-9393 for assistance. Clicking on a ID number in the table will open that application.

PENDING SITE APPLICATIONS AND RECERTIFICATIONS

Request ID#	Request Type	Site Name	Address	Date Last Updated	Status	
51744 🕟	Site Recertification	DOVER FOXCROFT FAMILY MEDICINE	891 WEST MAIN STREET SUITE 200 DOVER-FOXCROFT, ME 04426	08/08/2013	In Progress	Cancel (>
51735 🕨	Site Application	Test Site 100	234 Anywhere Street Anywhere, FL 23456	08/08/2013	Submitted - Pending Decision	
51734 🕟	Site Application	Test site 13	123 anywhere street Anywhere, FL 12345	08/08/2013	In Progress	Cancel ()

The table includes the following information about pending applications:

- 1. Request ID# this is the unique ID number for the application.
- 2. Request Type the type of request (e.g. Site Application or Site Recertification).
- 3. Site Name this is the name of the site which the application is for.
- 4. Address- this is the physical address of the site.
- **5. Date Last Updated** this is the date on which the application was last modified.
- **6. Status** this is the current status of the application, the status can be as follows:
 - 1. In Progress the application is incomplete and has not been submitted.
 - 2. Submitted Pending Decision- the application has been submitted for review.

CANCELLING A SITE APPLICATION OR RECERTIFICATION

To cancel a site application or recertification, select the "Cancel" button on the row of the request to be removed. Only requests that are "In Progress," may be cancelled.



Upon selecting the "Cancel" button, the system will display a confirmation message. Selecting "Yes, Cancel" will void the request. You will receive a portal message in "My Messages" notifying you of the cancellation. The request itself will be removed from the Pending Site Applications and Recertifications table and appear in the Inactive Sites table.

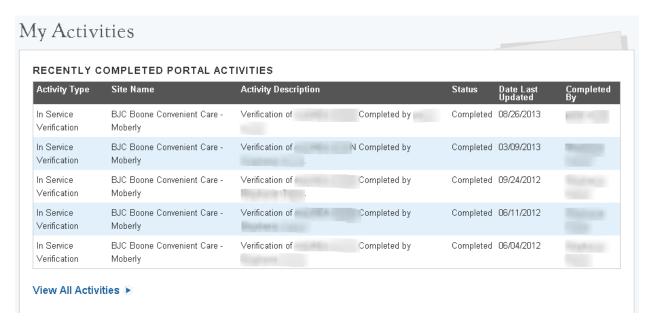




NHSC Site Administrator Portal User Guide

MY ACTIVITIES

The My Activities section displays recently completed portal activities and information related to that activity in a read only format. The site administrator may also choose to view all the activities that he/she have ever completed by selecting "View All Activities." If the site administrator feels that a completed activity is missing from the list, please call 1-800-221-9393 for assistance.



The table includes the following information about the site administrator's activities:

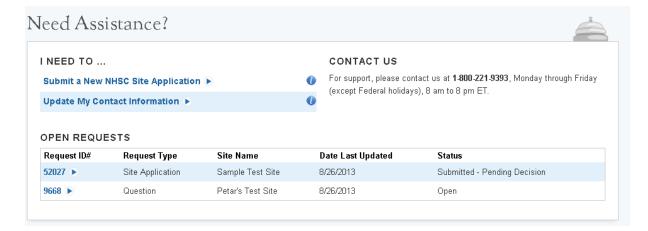
- **1. Activity Type** the type of activity completed.
- **2. Site Name** this is the name of the site which the request is associated with.
- **3. Activity Description** a short description of the activity.
- 4. Status this is the current status of the request, available statuses vary based on the request.
- **5. Date Last Updated** this is the date on which the request was last modified.
- **6. Completed By** the name of the individual who completed the activity.



NHSC Site Administrator Portal User Guide

NEED ASSISTANCE?

The Need Assistance section provides the site administrator with tools to help manage their account and sites. In this section is also the number to call for support, common activities the site administrator can perform and a list of all open requests for that site administrator.



Submit a New NHSC Site Application – see pg. 11

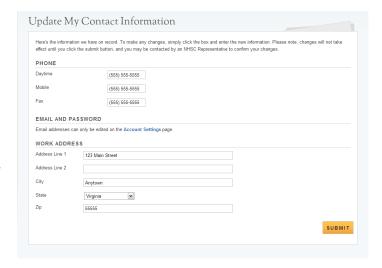
The table includes the following information about pending applications:

- 1. Request ID# this is the unique ID number for the application.
- 2. Request Type the type of request (i.e. Site Application, Site Recertification, Question, etc...).
- **3. Site Name** This is the name of the site which the request is associated with.
- **4. Date Last Updated** this is the date on which the request was last modified.
- 5. Status this is the current status of the request, available statuses vary based on the request.

UPDATE MY CONTACT INFORMATION

Selecting Update My Contact Information opens the form to the right. Here the site administrator can update the following information about themselves:

- 1. Phone Numbers Daytime, Mobile and Fax numbers.
- 2. Email and Password are handled through the Account Settings page (pg. 5).
- 3. Work Address the address at which the site administrator works.

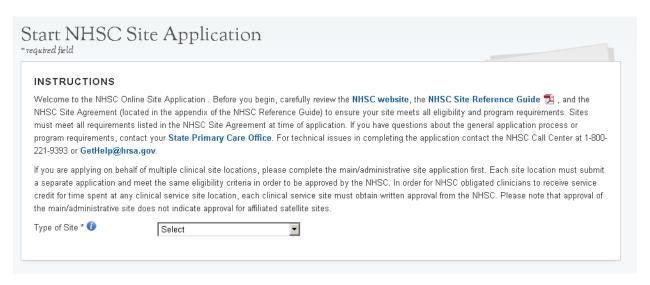




NHSC Site Administrator Portal User Guide

APPLYING FOR A NEW NHSC SITE

The site administrator portal allows site administrators to apply for new sites to become part of the NHSC. A site administrator can begin a new application by either selecting the "Apply for a New NHSC Site" button from the landing page, or by selecting the "Submit a New NHSC Site Application" in the Need Assistance Section. Only sites that have never been part of the NHSC at one time should initiate a new site application.



When starting a new application, the site administrator must first select the type of site they are applying for from a list in the drop down menu. If the type of site selected has a Site Subtype, they are also required to select the subtype from another drop down menu list before continuing to the NHSC Site Eligibility Questions.



If the selected site type or subtype (if applicable) is auto-approved or ineligible to apply, a message informing the site administrator will be displayed.

The Site is Ineligible to Apply:

Due to the type of facility of your site, this location is not an eligible service site for the National Health Service Corps (NHSC). A listing of eligible site types is available on the **NHSC** website. If you have additional questions, please contact your **State Primary Care Office** or the NHSC Call Center at 1-800-221-9393 or **GetHelp@hrsa.gov**

The Site is Auto-Approved:

Please Note: If your site is 1) a Federally Qualified Health Center funded under Section 330 of the Public Health Service Act, 2) an Indian Health Service Site funded through IHS, or 3) a Federal Prison, you do not need to submit a site application as your site may receive automatic approval through the National Health Service Corps (NHSC). If you cannot see this site in the "NHSC Approved Sites" section of the portal, please contact us at 1-800-221-9393 or GetHelp@hrsa.gov.

^{**}If your site is an auto-approved site type, please contact the NHSC indicating your interest in joining.**



NHSC Site Administrator Portal User Guide

NHSC SITE ELIGIBILITY QUESTIONS

After selecting a Site Type and Site Subtype (if applicable), the site administrator must answer the NHSC Site Eligibility Questions to ensure their facility is eligible to participate in the National Health Service Corps (NHSC).

NHSC SITE ELIGIBILITY QUESTIONS As an official representative of the applying site, please answer each of the following questions. For more information on NHSC member site eligibility requirements, please visit the NHSC Sites website. As an official representative of the applying site, have you read the NHSC Site Reference Guide 🔁 and do you understand the program requirements as listed in the NHSC Site Agreement included at the end of the Reference Guide? O Yes O No Is your site physically located in and does it serve the population of a Health Professional Shortage Area (HPSA) which corresponds to the services provided at the site? O Yes O No Is your site a Primary Care Outpatient Facility, as defined below, or a CMS-certified Critical Access Hospital? 🕡 Does your site utilize a qualified discounted/sliding fee schedule and has it been in place for at least 12 months? 0 O Yes O No Does your site deny services to an individual based on inability to pay or enrollment in Medicare, Medicaid or your state's Children's Health Insurance Program (CHIP)? C Yes C No Does your site utilize a credentialing process which, at a minimum, includes reference review, licensure verification, and a query of the National Practitioner Data Bank (NPDB)? C Yes C No Does your site prominently display a statement in common areas (and on site's Web site if applicable) that explicitly states that 1) no one will be denied access to services due to inability to pay and 2) there is a discounted/sliding fee schedule available? Examples of acceptable sign and website language are located in the Downloadable Resources section of the NHSC website under "Site Policy Poster". O Yes O No CONTINUE

The "Continue" button will not be enabled until each question is answered. Upon selecting "Continue," the General Information Page will be displayed or the Site Administrator will be notified the site is ineligible to apply based on the previous answers (Image located below).

Eligibility Information Based on responses to the above questions, this site is not eligible for participation in the National Health Service Corps (NHSC). For more information on NHSC site eligibility and program requirements, please review our website and the NHSC Site Reference Guide 1. If you have additional questions, please contact your State Primary Care Office or the NHSC Call Center at 1-800-221-9393 or GetHelp@hrsa.gov.



NHSC Site Administrator Portal User Guide

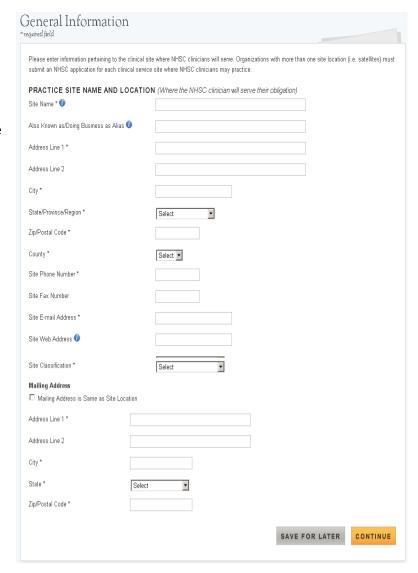
GENERAL SITE INFORMATION (1/6)

The first page of the site application captures the contact information for the site applying to become part of the NHSC.

The site administrator completes the fields on the form. All fields marked with an asterisk (*) are required fields. Move mouse over tooltip icons (①) to view additional information about the field.

Important Notes:

- Practice Site Name and Location this is the physical address of the site. There are separate fields for mailing address.
- 2. Also Known as/Doing Business as this is an alternate name the facility may be referenced as. The name entered in the Site Name field is how the record will appear in the system.
- 3. Check the box under "Mailing Address" to indicate that the physical address and the mailing address for the site are the same.
- 4. Upon completion of this page, the appropriate State PCO Member is notified that the site has initiated an application.



The site administrator may select to "Save for Later" to save the information and return to the landing page only when all the required fields have been entered. Selecting "Home" in the navigation banner located at the top of every page, will return the site administrator to the landing page without saving the information. Only selecting "Continue" or "Save for Later" will save the information that has been entered on the page.

APPLICATION POINTS OF CONTACT (2/6)

This section of the application has identical functionality to the Manage Points of Contact tool discussed as part of Site Self Service (pg. 26).

NOTE: All sites except those classified as Solo Private Non-Profit or Solo Private For Profit are required to list a minimum of 2 points of contact.



NHSC Site Administrator Portal User Guide

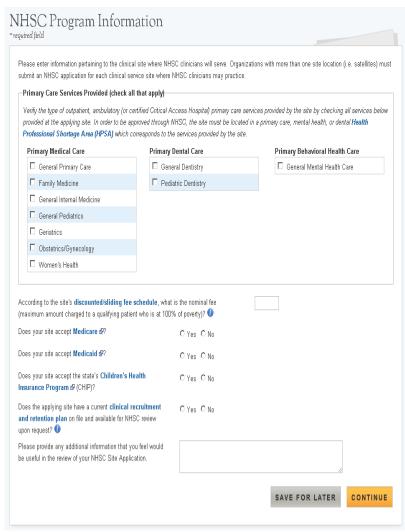
NHSC INFORMATION (3/6)

The third page of the site application captures the NHSC Program information for the site applying to become part of the NHSC.

All fields marked with an asterisk (*) are required fields. Move mouse over tooltip icons (•) to view additional information about the field.

Important Notes:

- The Site Administrator is required to select at least one service that is provided at the site.
- 2. The Site Administrator is required to enter the corresponding insurance number if selecting "Yes" to the Medicaid, Medicare or State Children's Health Insurance questions. If "No" is selected for any of those questions, the Site Administrator is required to enter a reason for not accepting that particular program.
- 3. The Site Administrator has the ability to enter any additional information that may be useful in the review of the application.



When the site administrator has finished entering the required NHSC Program Information, selecting "Continue" will navigate to the next page of the application.



NHSC Site Administrator Portal User Guide

HPSA SCORE SUGGESTION (4/6)

The HPSA Score Suggestion page allows the Site Administrator to suggest HPSAs appropriate for the site using the HPSA Find Tool. HPSA suggestion is not required to submit an application. Only HPSAs that match the primary care services (Primary Medical, Primary Dental, or Primary Behavioral Health Care) selected on the NHSC Program Information page may be suggested.

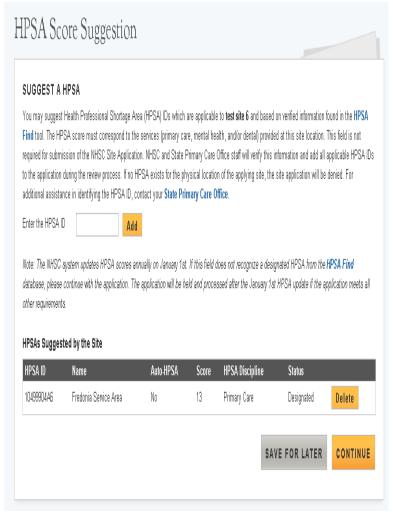
Steps for Suggesting a HPSA:

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

HPSA Rules:

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

unless one of the HPSAs is an Auto-HPSA.



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

The HPSAs Suggested by the Site table displays the following information:

- **1. HPSA ID** the ID assigned to the HPSA.
- 2. Name- the name of the HPSA.
- 3. Auto HPSA- Yes/No indication if the HPSA is auto-approved
- 4. Score- the current score of the HPSA.
- 5. HPSA Discipline- the discipline of the HPSA. Options include Primary Care, Mental Health, or Dental.
- 6. Status- the current status of the HPSA.

The site administrator may remove HPSAs that have been suggested by selecting "Delete" on the row of the HPSA to be deleted.



NHSC Site Administrator Portal User Guide

APPLICATION SUPPORTING DOCUMENTS (5/6)

The fifth page of the site application allows the site administrator to digitally upload supporting documents required to prove NHSC eligibility.

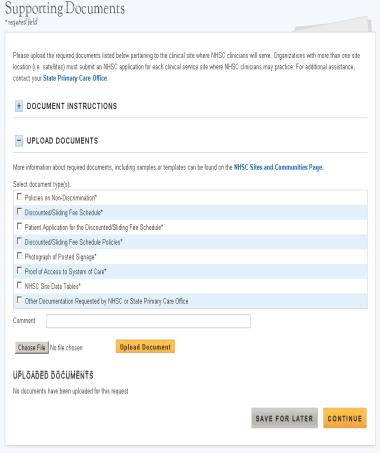
The documents that appear in the Selected Document Types table are required. Instructions, site agreement requirements, and other information regarding each type of document listed can be found by expanding the Document Instructions accordion. Comments are optional, unless "Other Documentation Requested by NHSC or State Primary Care Office" is selected.

When the site administrator is finished uploading documents, selecting "Continue" will navigate to the next page of the application.

Uploading a Document (File Size Limit: 5 MB)

- Select one or more document types for the document. A single document may contain several document types (e.g. a single PDF file may have a Discounted Sliding Fee Schedule and NHSC Site Data Tables in one document).
- 2. Select "Choose File" and browse and select the appropriate file.
- 3. Select "Upload Document."

Deleting a Document – In the Uploaded Documents table, select "Delete" in the row of the particular document to remove it.





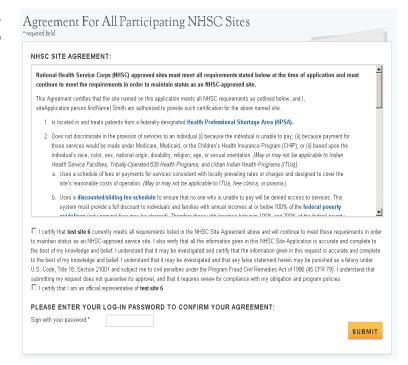
NHSC Site Administrator Portal User Guide

APPLICATION SITE AGREEMENT (6/6)

The final page of the site application is where the site administrator agrees to the NHSC Site Agreement.

Agreement and Submission

- Read the NHSC Site Agreement.
- Check the box certifying that the site meets and will continue to meet NHSC site requirements.
- Check the box certifying you are an official representative of the site.
- Digitally sign the application by entering the site administrator's password.
- 5. Select "Submit."



What Happens Now?

Upon submission, the application is sent to the appropriate analyst at the Division of Regional Operations (DRO) for review as well as the appropriate State Primary Care Office (PCO) staff member for additional comments and a recommendation. When a final decision has been made on the application, the site administrator will be notified of the decision via a portal message and the information for the site will be updated in the system accordingly.



NHSC Site Administrator Portal User Guide

SITE INFORMATION LANDING PAGE (OVERVIEW)

The Site Information Page provides, at a glance, all the tools the site administrator needs to manage their site. The Site Information Page is broken into three sections:

1. Site Information (pg. 19)

This section includes all the information about the site. The sections are expandable and include the contact information for a site, additional NHSC site information and the site's

main/administrative site's basic information (if available).



2. Self-Service (pg. 21)

This section provides tools for managing the site.

3. Need Assistance? (pg. 34)

Additional tools and functionality for helping the site administrator solve problems.

Each of these sections is examined in more detail below.



NHSC Site Administrator Portal User Guide

SITE INFORMATION

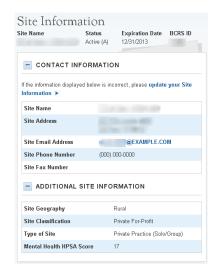
At a glance, the Site Information section of the Site Information page displays the site's name, status, expiration date and BCRS ID. This section also includes the following tools to help the site administrator:

1. Contact Information (pg. 20)

This tool allows the site administrator to view and update the site's information.

2. Additional Site Information (pg. 20)

This tool allows the site administrator to view additional NHSC information for the site.

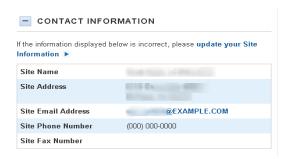




NHSC Site Administrator Portal User Guide

CONTACT INFORMATION

At a glance, the Contact Information section displays the site's name, address, email, and phone and fax numbers for the site. Selecting "Update your Site Information" has identical functionality to the Manage Site Profile tool discussed as part of Site Self Service (pg. 29).

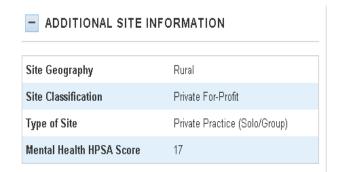


The Contact Information section displays the following information:

- 1. Site Name this is the name of the site.
- 2. Site Address this is the physical address for the site (mailing address is stored separately).
- 3. Site Email Address- the email address of the site.
- **4. Site Phone Number** the phone number of the site.
- 5. Site Fax Number- the fax number of the site.

ADDITIONAL SITE INFORMATION

The Additional Site Information section displays NHSC information for the site in a read only format.



The Additional Site Information section displays the following information:

- **1. Site Geography** the type of geography associated with the site (e.g. Rural, Frontier, or Urban).
- 2. Site Classification the classification of the site.
- **3. Type of Site** the site type of the facility.
- **4. (Type of HPSA) HPSA Score** the type and current score of the HPSA(s) assigned to the site.



NHSC Site Administrator Portal User Guide

SELF-SERVICE

The Self-Service section of the Site Information Page includes the following tools to help the site administrator:

1. Manage Current Job Openings (pg. 22)

This tool allows the site administrator to create new job postings that will appear on the Job Opportunities List (JOL).



2. View Clinician Roster (pg. 25) (only available for sites with clinicians in service)

This tool allows the site administrator to view all the clinicians currently serving obligations at the site.

3. Manage Points of Contact (pg. 26)

This tool allows the site administrator to update the points of contact (POCs) for this site.

4. Manage Site Profile (pg. 29)

This tool allows the site administrator to update basic contact information as well as the site profile for the site.

5. Site Visits (p. 33)

This tool allows the site administrator to view past and upcoming site visits.



NHSC Site Administrator Portal User Guide

RECRUITMENT MANAGEMENT (MANAGE CURRENT JOB OPENINGS)

This tool allows the site administrator to manage the positions posted to the Job Opportunities List (JOL). Here the site administrator can create new open job postings, update current job postings and close non-valid job postings. A complete Site Profile is required before creating or updating existing positions



The Open Positions table shows all the current job postings for that site. The table displays the following information:

- 1. ID the unique ID number for the positions.
- 2. **Discipline** the discipline associated with the position.
- 3. Specialty the specialty associated with the discipline.
- **4. Allocation** either "Full-Time" or "Part-Time."
- 5. Eligible For the NHSC participant program that this position is eligible for, either "Loan Repayment Program" or "Loan Repayment or Scholar Program."
- 6. Posting Expiration when the job posting will stop posting on the JOL (extendable by the site administrator).
- 7. Last Updated the date the position was last edited.

From this page the site administrator can:

- 1. Create a New Position.
- 2. View/Edit Existing Open Positions.
- **3.** View a History of Positions.



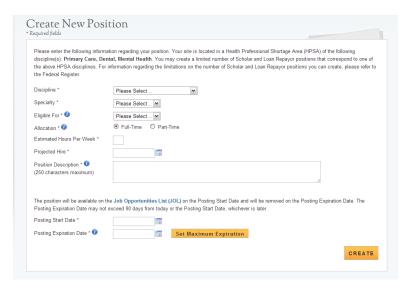
^{**}The History of Positions will display a list of all vacancies that closed or expired after September 7, 2011.**

NHSC Site Administrator Portal User Guide

CREATE A NEW POSITION

The Create New Position screen allows the site administrator to create a new open job posting for the Job Opportunities List (JOL). The screen will only allow the site administrator to create position postings that correspond to the Health Professional Shortage Areas (HPSAs) designated to the site. The paragraph at the top of the page indicates which HPSA types are designated for the site (Primary Care, Dental and/or Mental Health).

When creating a new position posting, the site administrator enters the following information (all fields are required):



- 1. Discipline The discipline for the position; filtered by the HPSAs designated for the site.
- 2. Specialty The specialty for the position; filtered by the Discipline selected.
- **Each position is assigned to a HPSA based on the Discipline and Specialty combination selected.**
 - 3. Eligible For The NHSC participant program for which service credit can be gained.

 This field is filtered by the score of the HPSA assigned to the position from the discipline and specialty combination and the currently enforced program limits as defined in the Federal Register (http://nhsc.hrsa.gov/communities/apply.htm).
 - **4. Allocations** The full-time or part-time designation for the position.
 - 5. Estimated Hours The number of hours per week the position is to fill.
 - 6. Projected Hire The date by which the site administrator is targeting the position to be filled.
 - **7. Position Description** A brief description of the position outlining the important functions of the position.

Each position must have a Posting Start Date and Posting Expiration Date.

Posting Start Date – The date on which the position posting should first appear on the JOL (new positions may take **up to 24 hours** from creation to appear on the JOL); cannot be before the current date.

Posting Expiration Date – The date on which the position posting should be removed from the JOL if not filled or closed beforehand. Posting Expiration Date can initially be a *maximum* of 90 days past the posting start date. The Set Maximum Expiration Button (

Set Maximum Expiration) can be used to automatically calculate and enter the maximum expiration date for the position posting.



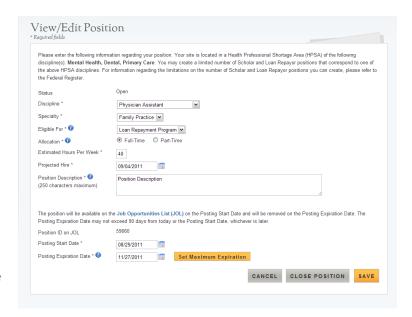
NHSC Site Administrator Portal User Guide

VIEW/EDIT A POSITION

The View/Edit Position Screen for open positions allows the site administrator to edit the attributes of the position.

All the same rules for the fields apply as when creating the position. For a description of the fields and rules, please refer to the Create New Position Section (pg. 23).

Adjusting Posting Expiration Date - the site administrator can change the posting expiration date. The new date can be set to a *maximum* of 90 days past the current date or 90 days past the Posting Start Date (only if the Posting Start Date is in the future).



CLOSING A POSITION

To close an open postion, on the View/Edit Position Screen, select the "Close Position" (CLOSE POSITION) button. A confirmation screen will appear. The site administrator must provide a reason for closing the vacancy. The current available reasons are:

- **Position is Filled** the position has been filled outside the NHSC (when an NHSC position is matched to an open position at a site the status of the position will update automatically).
- No Longer an Open Position the position is not being offered any longer.



Only after a reason for closure has been entered can the position be closed.



NHSC Site Administrator Portal User Guide

CLINICIAN ROSTER (VIEW CLINICIAN ROSTER)

The site administrator has the ability to view a list of NHSC clinicians currently serving a service obligation at their site. If a site has one or more NHSC clinicians in service, the "View Clinician Roster" tool will be available under "Self-Service" on the Site Information Page.

The clinician roster lists all NHSC clinicians who are currently fulfilling their service obligation at your site. Clinicians which are not part of the NHSC will not be shown here.

CLINICIAN ROSTER

Clinician	Discipline	Specialty	Program	Allocation	Start Date	Obligation End Date
	Certified Nurse Midwife	None	Loan Repayment Program	Full-Time	4/26/2011	12/9/2012

The Clinician Roster includes the following information:

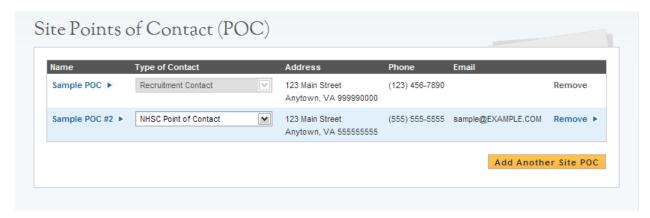
- 1. Clinician the name of the clinician in service.
- **2. Discipline** the discipline of the clinician.
- **3. Specialty** the specialty of the clinician.
- 4. Program the NHSC program for the clinician; either Loan Repayment or Scholar Program.
- **5. Allocation** full-time or part-time.
- **6. Start Date** the initial date the clinician began fulfilling service obligation at the site.
- **7. Obligation End Date** the current date the clinician will fulfill their service obligation.



NHSC Site Administrator Portal User Guide

MANAGE POINTS OF CONTACT (POC)

The Site Point of Contacts (POC) table shows, at a glance, all the POCs currently associated with the site.



The Site Points of Contact table provides the following information:

1. Name – the name of the POC.

If the name is in blue, then the POC is confirmed for that site and is editable by the site administrator, if the name is gray, then the POC is unconfirmed and is not editable by the site administrator. For more information on confirming POCs, see the Adding Points of Contact Section (pg. 27).

2. Type of Contact – the type of POC.

A minimum of one Recruitment Contact is required for each site; this is the POC that is sent to the Opportunities List with open position postings.

- 3. Address the work address of the POC.
- 4. Phone the primary phone number for the POC.
- 5. Email the primary email address for the POC.

From this screen the site administrator can:

- 1. Remove a POC.
- 2. Add a POC.
- 3. Edit a POC.

REMOVING A POC

To remove a POC from the site, select the "Remove" link on the row of the POC to be removed. If the remove option is gray, then the POC cannot be removed.

A POC may not be removed in the following conditions:

- 1. The POC is the site administrator currently viewing the table.
- 2. The POC is the only Recruitment Contact for the site.

To remove a POC designated as the only Recruitment Contact for a site, you must assign another POC listed the Recruitment Contact role. The first POC is now removable.



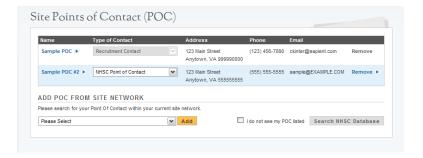
NHSC Site Administrator Portal User Guide

ADDING A POC

When adding a new POC to the site, the system provides three separate ways to locate and add a POC. Each method must be performed in the order listed.

1. Adding a POC from Within the Site's Network

The first method for adding a new POC is using the in-network dropdown menu. An "in-network" POC is an individual who serves as a POC as another site that is affiliated with the current site and the affiliation is on file with the NHSC. If the site has no other in-network sites or innetwork POCs on record, the system will skip this method.



To add a POC from within the site network, select the POC from the dropdown and select "Add". POCs added using this method are automatically confirmed and their information is automatically editable in the Site POC Table.

If the desired POC is not listed, check the box next to "I do not see my POC listed" and select "Search NHSC Database" to continue to the next search method.

2. Searching the NHSC Database

The second method for adding a POC is searching for an existing POC in the NHSC database.

To search for a POC enter any criteria in the search fields and select "Search". The POCs listed are POCs at other existing NHSC sites and are outside the



current site's network. In the list of search results, select a POC. Only POCs at other sites are displayed through this search method. If the desired POC is also an NHSC clinician, please contact the NHSC for assistance.

When adding a POC using this method, the POC will be added as "unconfirmed" and will not be editable from the Site POC table. An email confirmation is sent to the newly added POC asking them to confirm the association. Once the POC confirms via the email, they will become editable in the Site POC Table.

If the desired POC is not found via search, check the box next to "No, my POC is not listed in these matches" and select "Enter New POC".

NOTE: Only Points of Contact are displayed through this search method. If the desired POC is an NHSC clinician, please contact the NHSC for assistance.



NHSC Site Administrator Portal User Guide

3. Entering New POC Information

The third and final option for adding a new POC to a site is to manually enter the POC information. All required fields are marked with an asterisk (*).

When entering an email address, use the work email address of the POC, not a personal email address. The email address must be unique for each POC across the NHSC.

Upon saving the information the system will search for potential matches in the system. If matches are located, the site administrator will be prompted to either select a match or save the newly entered information.

POCs created using this method are automatically confirmed for the site and are immediately editable in the Site POC Table.



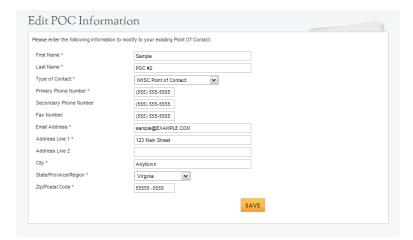
EDITING A POC

Selecting an editable POC in the Site POC Table opens the Edit POC Information screen.

Here the site administrator can update the POC information as appropriate and select "Save". All required fields are marked with an asterisk (*).

Updating Your Own Information

When site administrators update their own records, they cannot update their name or



email address from this page. In order to change their name, site administrators need to contact BCRS. To change their email address, site administrators need to use the Account Settings tool (pg. 5).

Updating Other POCs Information

Site administrators have the ability to update the information for other POCs at their site(s). If the POC the site administrator wishes to edit has registered a portal account, the site administrator will *not* be able to change their name or email address. If the POC the site administrator wishes to edit has not registered a portal account, the site administrator will be able to edit all fields.

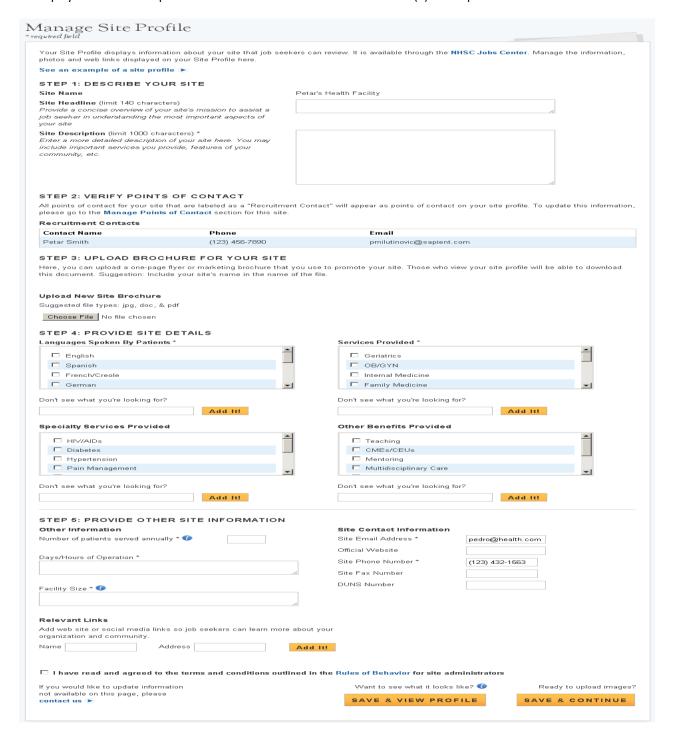
Whenever POC information is changed, the POC whose record was changed will receive an email notifying them of the change.



NHSC Site Administrator Portal User Guide

MANAGE SITE PROFILE

The first page displayed for the Site Administrator upon selecting "Manage Site Profile" from the Self Service section or selecting "Update your Site Information" from the Contact Information section is the Manage Site Profile Page. The information that the site administrator can update directly on the portal is limited to information that does not affect NHSC eligibility or Health Professional Shortage Area (HPSA) designation. This information will be displayed on the site's profile on the Jobs Center. Fields marked with (*) are required fields.





NHSC Site Administrator Portal User Guide

To update the information, the site administer enters the new information into the appropriate field, selects the checkbox agreeing to the terms and conditions and selects "Save and Continue". Selecting "Save & View Profile" will display how the information will appear on the Jobs Center. The information that a site administrator can update is as follows:

- 1. Step 1: Describe your site (pg. 30) a description of the site.
- 2. Step 2: Verify Points of Contact (pg. 30) the point(s) of contact for the site. Please refer to p.23 (Manage Points of Contacts) for more information.
- 3. Step 3: Upload a Brochure for your Site (pg.31) the ability for the site to upload their brochure.
- **4. Step 4: Provide Site Details (pg. 31)** a list of options such services the site provides, languages spoken, any other benefits the site may choose.
- 5. Step 5: Provide Other Site Information (pg. 32) other information the site provides.
- **6. Step 6: Manage Site Profile Images (pg. 32)** images the site may upload to be displayed on the Jobs Center.

If the site administrator needs to update any other information about the site (i.e. site name, address, site type, etc...), please contact NHSC using the "Contact Us" link at the top of the page as this information may affect NHSC eligibility.

DESCRIBE YOUR SITE

When describing the site, the system allows the site administrator to enter the site's headline as well as a short description.

Site Name	Petar's Health Facility
Site Headline (limit 140 characters) Provide a concise overview of your site's mission to assist a job seeker in understanding the most important aspects of your site	
Site Description (limit 1000 characters) * Enter a more detailed description of your site here. You may include important services you provide, features of your community, etc.	

- 1. Site Headline- a concise overview of the site's mission.
- **2. Site Description** a detailed description of the site.

VERIFY POINTS OF CONTACT

This section of the application has identical functionality to the Manage Points of Contact tool discussed as part of Site Self Service (pg. 26).

STEP 2: VERIFY POINTS OF CONTACT All points of contact for your site that are labeled as a "Recruitment Contact" will appear as points of contact on your site profile. To update this information, please go to the Manage Points of Contact section for this site. Recruitment Contacts

Contact Name	Phone	Email
Petar Smith	(123) 456-7890	pmilutinovic@sapient.com



NHSC Site Administrator Portal User Guide

UPLOAD BROCHURE FOR YOUR SITE

This section allows the site administrator to upload a brochure to promote the site.

STEP 3: UPLOAD BROCHURE FOR YOUR SITE

Here, you can upload a one-page flyer or marketing brochure that you use to promote your site. Those who view your site profile will be able to download this document. Suggestion: Include your site's name in the name of the file.

Upload New Site Brochure

Suggested file types: jpg, doc, & pdf

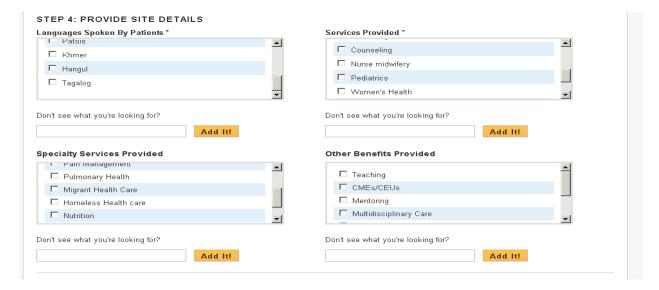
Choose File | No file chosen

Uploading a Document (File Size Limit: 5 MB)

- 1. Select a document to upload.
- 2. Select "Choose File" and browse and select the appropriate file.

PROVIDE SITE DETAILS

This section allows the site administrator to select details about the site. If the site administrator cannot find the specific item that is listed, they may add the item by entering it in the data field located below that specific section and selecting "Add It!"



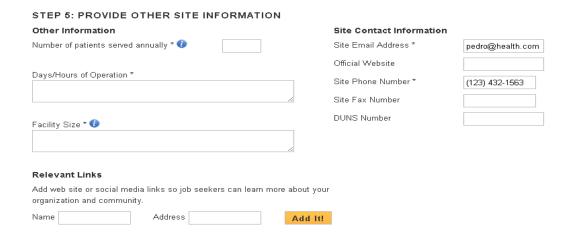
- **1. Languages Spoken By Patients** allows the site administrator to select the various languages spoken by patients of the site.
- **2. Services Provided** allows the site administrator to select the various services that are provided at the site.
- **3. Specialty Services Provided** allows the site administrator to select the various specialty services that are provided at the site.
- 4. Other Benefits Provided allows the site administrator to select other benefits that the site provides.



NHSC Site Administrator Portal User Guide

PROVIDE OTHER SITE INFORMATION

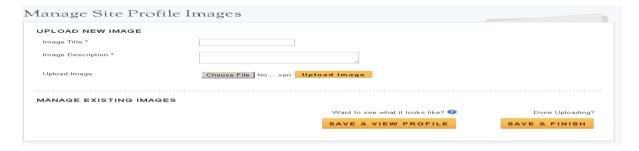
This section allows the site administrator to provide further details about the site as well as update the site's contact information.



- 1. Number of patients served annually- this is the number of patients the site treats in a calendar year.
- 2. Days/Hours of Operation- the days of operation and the business hours of the site.
- 3. Facility Size- the total number of exam rooms/examination chairs the site has.
- 4. Relevant Links- additional links the site has added.
- 5. Site Contact Information- the contact information and DUNS Number associated with the site.

MANAGE SITE PROFILE IMAGES

Upon selecting "Save and Continue" on the Manage Site Profile page, the site administrator is navigated to the Manage Site Profile Images page. On this page, the site administrator has the ability enter a description and upload images that will be displayed on the site's profile on the Jobs Center as well as manage existing images.



Uploading an Image (File Size Limit: 5 MB)

- 1. Select "Choose File" and browse and select the appropriate file.
- 2. Select "Upload Image."

When the Site Administrator has finished uploading images, selecting "Save and finish" will save the information that has been entered and return the site administrator to the Site Information Landing page.



NHSC Site Administrator Portal User Guide

SITE VISITS

The Site Visit table displays all pending site visits as well as site visits that have already been performed.



The Pending Visits table and the Past Visits table provide the following information:

- **1. Type** the type of visit scheduled.
- **2. Scheduled Date** the date and time the visit is scheduled for.
- 3. Status- the current status of the visit.



NHSC Site Administrator Portal User Guide

NEED ASSISTANCE? (SITE INFORMATION PAGE)

The Need Assistance section of the Site Information Page allows the site administrator to perform four actions:

1. View Submitted Requests (pg. 34)

Recent requests submitted for the site will appear in the table with older requests in the "View All Requests" link.

2. Recertify (pg. 35)

Submit a recertification for the site when it is about to expire.

- 3. Reapply (pg. 41) (not pictured) Resubmit an application after the previous attempt was rejected.
- 4. Ask a Question (pg. 42) Ask BCRS a question using the inquiry feature.



VIEWING REQUESTS

The "All Requests" table on the Site Information page includes requests with action in the past 30 days. To view older requests, the "View All Requests" link will display tables for all "open" requests and a history of all "closed" requests for the site. Selecting a request from either of the tables will open a page with the request details and any actions the site administrator can perform. The information in the tables includes:

- 1. **Request Type** identifies the type of request.
- 2. **Date Submitted** the date the request was first submitted.
- 3. **Date Last Updated** the date the request was last modified or action was taken.
- 4. Status status of the request, either "Submitted", "Open" or "Closed" for an inquiry or "Submitted-Pending Decision", "Canceled", "Rejected", "Pending Site Visit" or "Approved" for an application.



NHSC Site Administrator Portal User Guide

SITE RECERTIFICATION

The "Recertify" link will appear when a site is able to recertify. NHSC sites are required to recertify every three (3) years in order to maintain eligibility. A portal message containing instructions will be sent to the site administrator when the recertification cycle opens notifying him/her that their site needs to submit a recertification. In order to initiate a recertification the site must:

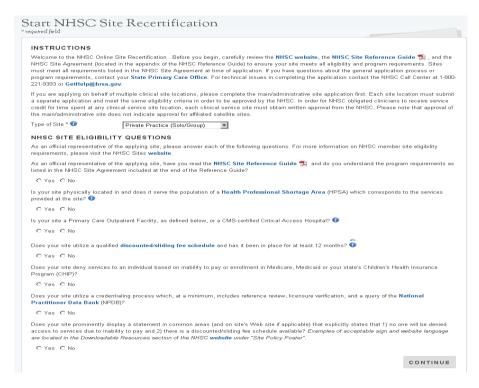
- Have an approved site application on file.
- Not have an existing site recertification in progress.
- Not have an existing site recertification pending a site visit.
- Not be in "Terminated" status.
- Not receive funding through the Bureau of Primary Health Care (BPHC) (recertification not required).
- Not be a "federal" site (IHS, ICE, Federal BOP, etc...) (recertification not required).

The recertification follows the same process as the site application, but is prepopulated with the current site information found in the system.

NHSC SITE ELIGIBILTY QUESTIONS

The first page of the site recertification is the NHSC Site Eligibility Page. The Site Administrator must correctly answer the eligibility questions to recertify.

The "Continue" button will not be enabled until each question is answered. Upon selecting "Continue," the General Information Page will be displayed or the Site Administrator will be notified the site is ineligible to apply based on the previous answers. (Image located below)



Eligibility Information

Based on responses to the above questions, this site is not eligible for participation in the National Health Service Corps (NHSC). For more information on NHSC site eligibility and program requirements, please review our **website** and the **NHSC Site Reference Guide** [2]. If you have additional questions, please contact your **State Primary Care Office** or the NHSC Call Center at 1-800-221-9393 or **GetHelp@hrsa.gov**.

BACK TO PORTAL



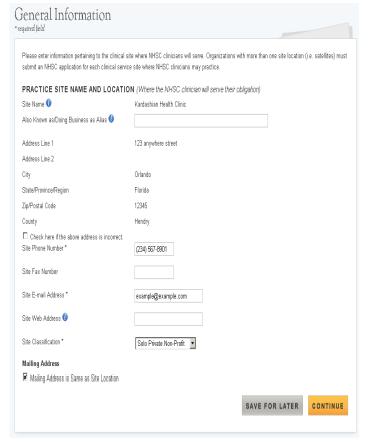
NHSC Site Administrator Portal User Guide

GENERAL INFORMATON (1/6)

The first page of the site recertification is the General Information page. The entire site's contact information is included on this page. The site's address information on this page is read only. If the Site Administrator needs to make changes to the address information, they should select the checkbox indicating the current information is not correct. On review, a DRO Analyst will be alerted that the current information is not correct and contact the site.

Fields which are editable:

- 1. Also Known as/Doing Business as Alias
- 2. Site Phone Number
- 3. Site Fax Number
- 4. Site E-mail Address
- 5. Site Web Address
- 6. Site Classification
- 7. Mailing Address



All fields marked with an asterisk (*) are required fields. Move mouse over tooltip icons (•) to view additional information about the field.

At any time during the recertification process, the Site Administrator can select "Save for Later" to save the information and complete the recertification later. Selecting "Home" in the navigation banner located at the top of every page, will return the site administrator to the landing page without saving the information. Only selecting "Continue" or "Save for Later" will save the information that has been entered on the page. Upon completion of this page, the appropriate State PCO Member is notified that the site has initiated a recertification.

NOTE: If the site has changed names or addresses, please contact your DRO state lead or the BCRS Customer Care Center at **1-800-221-9393**.

POINTS OF CONTACT (2/6)

This section of the application has identical functionality to the Manage Points of Contact tool discussed as part of Site Self Service (pg. 26).

NOTE: All sites except those classified as Solo Private Non-Profit or Solo Private For Profit are required to list a minimum of 2 points of contact.



NHSC Site Administrator Portal User Guide

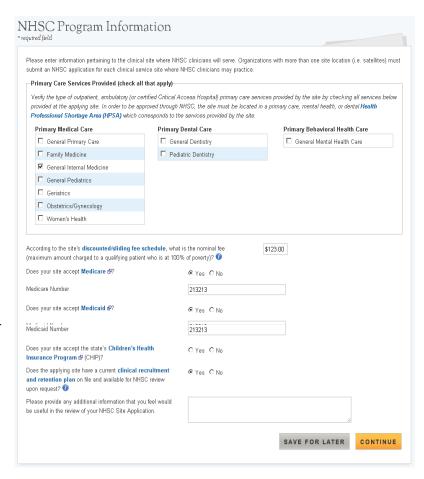
NHSC PROGRAM INFORMATION (3/6)

The third page of the site recertification displays the NHSC Program information for the site. All fields are prepopulated and editable.

All fields marked with an asterisk (*) are required fields. Move mouse over tooltip icons (0) to view additional information about the field.

Important Notes:

- 1. The Site Administrator is required to select at least one service that is provided at the site.
- 2. The Site Administrator is required to enter the corresponding insurance number if selecting "Yes" to the Medicaid, Medicare or State Children's Health Insurance questions. If "No" is selected for any of those questions, the Site Administrator is required to enter a reason for not accepting that particular program.
- 3. The Site Administrator has the ability to enter any additional information that may be useful in the review of the application.



When the site administrator has finished entering the required NHSC Program Information, selecting "Continue" will navigate to the next page of the recertification.

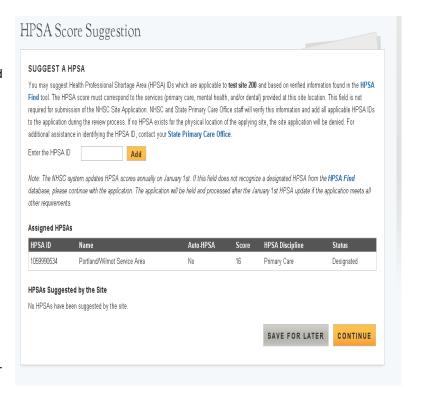


HPSA SCORE SUGGESTION (4/6)

The HPSA Score Suggestion page allows the Site Administrator to suggest HPSAs appropriate for the site using the HPSA Find Tool. HPSA suggestion is not required to submit a recertification. Only HPSAs that match the primary care services (Primary Medical, Primary Dental, or Primary Behavioral Health Care) selected on the NHSC Program Information page may be suggested. HPSAs that are currently assigned to the site will also be displayed.

Steps for Suggesting a HPSA:

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



HPSA Rules:

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

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

The HPSAs Suggested by the Site table and the Assigned HPSAs displays the following information:

- 1. **HPSA ID** the ID assigned to the HPSA.
- 2. Name- the name of the HPSA.
- 3. Auto HPSA- Yes/No indication if the HPSA is auto-approved
- **4. Score** the current score of the HPSA.
- 5. HPSA Discipline- the discipline of the HPSA. Options include Primary Care, Mental Health, or Dental.
- 6. Status- the current status of the HPSA.

The site administrator may remove HPSAs that have been suggested by selecting "Delete" on the row of the HPSA to be deleted.



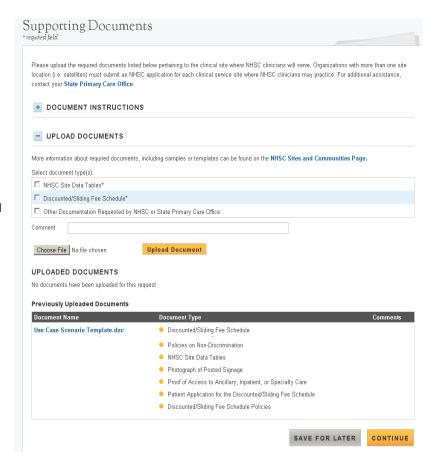
NHSC Site Administrator Portal User Guide

SUPPORTING DOCUMENTS (5/6)

The fifth page of the site recertification allows the site administrator to digitally upload supporting documents required for recertification. Documents which were uploaded with the initial approved site application will also be listed and eligible to be opened to view.

The documents that appear in the Selected Document Type(s) table are required. Instructions, requirements, and other information can be found by expanding the Document Instructions accordion. Comments are optional, unless "Other Documentation Requested by NHSC or State Primary Care Office" is selected.

When the site administrator is finished uploading documents, selecting "Continue" will navigate to the next page of the recertification.



Uploading a Document (File Size Limit: 5 MB)

- **4.** Select one or more document types for the document. A single document may contain several document types (e.g. a single PDF file may have a Sliding Fee Schedule and Proof of Practice in one document).
- **5.** Select "Choose File" and browse and select the appropriate file.
- 6. Select "Upload Document."

Deleting a Document – In the uploaded documents table, select "Delete" in the row of the document to remove that document.



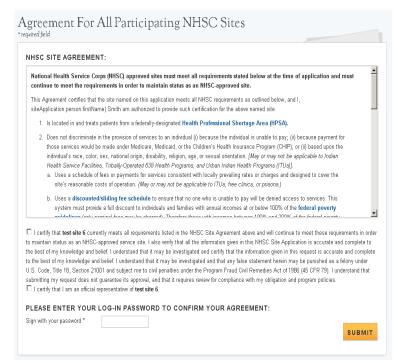
NHSC Site Administrator Portal User Guide

SITE AGREEMENT (6/6)

The final page of the site recertification is where the site administrator agrees to the NHSC Site Agreement.

Agreement and Submission

- **1.** Read the NHSC Site Agreement.
- Check the box certifying that the site meets and will continue to meet NHSC site requirements.
- Check the box certifying you are an official representative of the site.
- Digitally sign the recertification by entering the site administrator's password.
- 5. Select "Submit."



What Happens Now?

Upon submission, the recertification is sent to the appropriate analyst at the Division of Regional Operations (DRO) for review as well as the appropriate State Primary Care Office (PCO) Member for additional comments and recommendations. When a final decision has been made on the recertification, the site administrator will be notified of the decision via portal message and the information for the site will be updated in the system accordingly.



NHSC Site Administrator Portal User Guide

REAPPLY

The "Reapply" link will appear when a site application has been rejected. A reapplication follows the same process as the initial site application, but is populated with the previously entered site information until the user reaches the NHSC Program Information page. All data fields are editable.



In order to reapply the site must:

- Have a rejected site application on file.
- Not have an existing application in progress.
- Not have an existing approved application.
- Not have an existing application that is pending a site visit.
- Not receive funding through the Bureau of Primary Health Care (BPHC) (recertification not required).
- Not be a "federal" site (IHS, ICE, Federal BOP, etc...) (recertification not required).



NHSC Site Administrator Portal User Guide

ASK A QUESTION

The Ask a Question tool allows a site administrator to ask a question to BCRS.

The Ask a Question page provides a section for the site administrator to enter a message and a place to upload any documents to help BCRS understand the issue.

Contact Us – enter a message for BCRS in the space provided. The message can be a question, comment or correction that needs to be made.

Upload Document (File Size Limit: 5MB) – the site

administrator may upload any documents to help BCRS understand the issue. Any uploaded documents can be viewed in the Your Uploaded Documents section.

To upload a document:

- 1. Select "Choose File" browse for and select a file
- 2. Enter a Description a brief description of the file being uploaded; this is required
- 3. Select "Upload Document"

What Happens Now?

After the site administrator selects "Send" the message is sent a BCRS intake team who will begin to work on answering the question or correcting the issue. BCRS may contact the site administrator with follow up messages as appropriate.

