Welcome to Verity!

Verity is the platform used by theBHPN to manage practitioners working with BHPN clients, and to conduct due diligence on each of those Practitioners. This User Guide is designed to walk you through the common uses of Verity by a BHPN Provider. If you have any questions or would like additional support, please do not hesitate to contact us at Quality@theBHPN.org.

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Verity Definitions

Verity Term	BHPN/Common Term	Example
Facility	BHPN Provider Company Account	Disney Behavior Group
Office/Location	Provider's Office or Location	Disney Behavior Group_Disneyland
Provider	Practitioner	Mickey Mouse, BCBA

Verity Provider/Clinic/Practitioner Structure

FACILITY
(Disney Behavior Group)

Think of this as your high-level Company Account

OFFICE/LOCATION
(Disney Behavior Group_Fairyland)

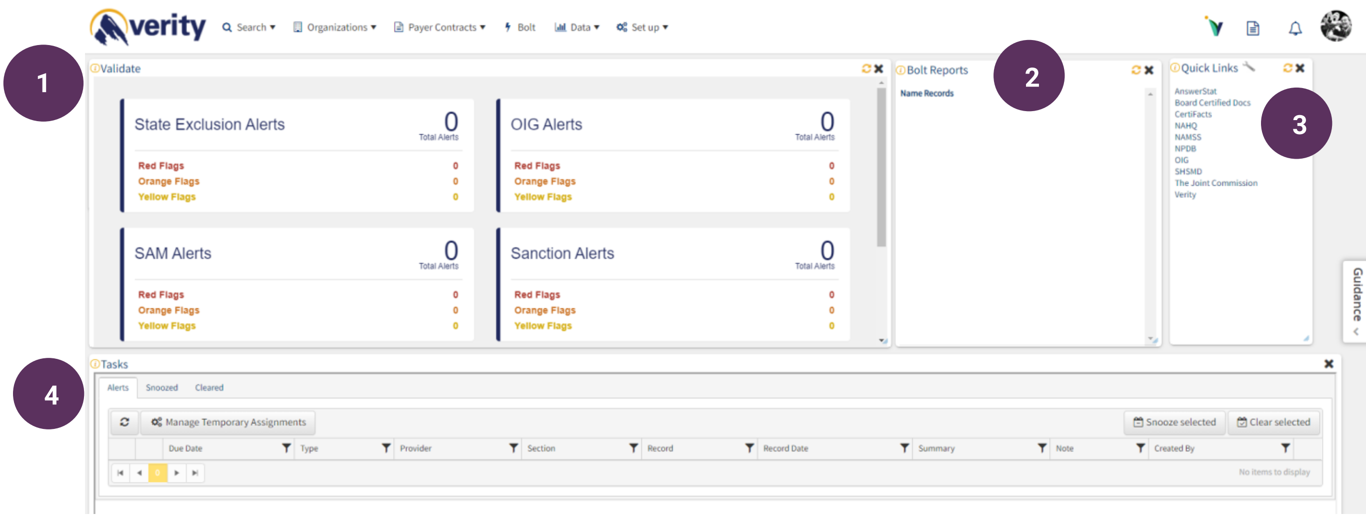
These are your Clinics / Sites

PROVIDER
(Mickey Mouse, BCBA)

These are the Practitioners registered at the above Clinic

Dashboard

Your Dashboard is what you will see as your homepage each time you log in and can help you quickly identify areas that need your attention.



<u>1: Validate Box:</u>
This box will show you any Practitioners registered with your organization, who is appearing on, or potentially appearing on, an Exclusion List. See the Section on Verifications for additional information.

<u>2: Bolt Reports Box:</u>
This box will give you quick access to pre-created reports on your Practitioners. See the Section on Bolt Reports for additional information.

<u>3: Quick Links Box:</u>
This box gives you quick links to industry websites, such as the BACB and OIG.

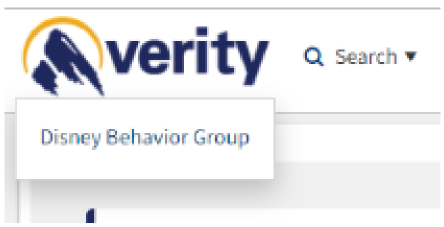
<u>4: Tasks/Alerts Box:</u>
This box gives you quick access to all tasks or alerts assigned to you. See the section on Tasks for additional information.

Navigating Verity

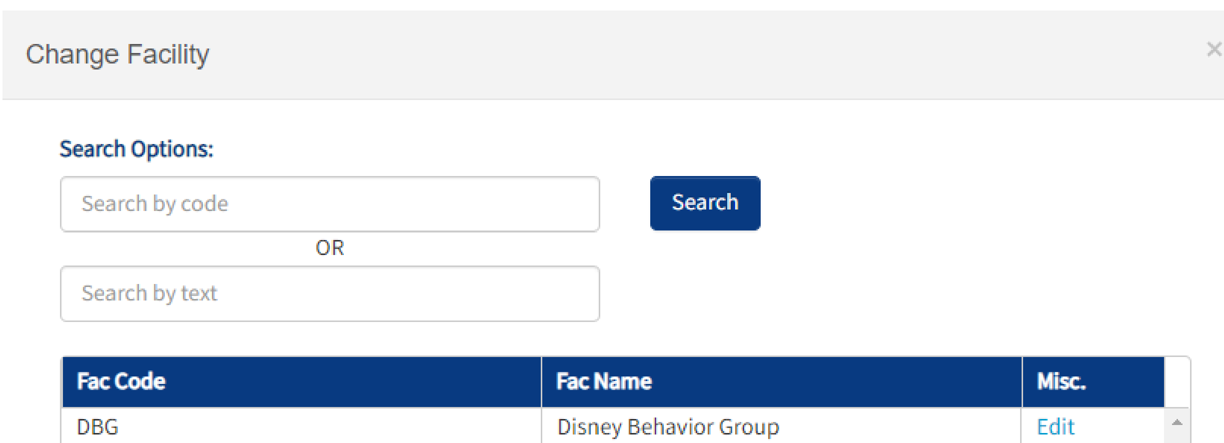
The upper left Verity logo is where you can change the organization you are working in. All BHPN Providers will have access to Disney Behavior Group and to their Organization. Disney Behavior Group can be used as a Sandbox environment to learn the system.

1. **Accessing your Organization**
   a. Hover mouse over the Verity icon on the left upper corner.

   b. The organization that you are currently in, will appear. To change the organization, select the text box that displays the name of the organization you are in.



   c. The “Change Facility” box will appear; select the organization you want to switch to.

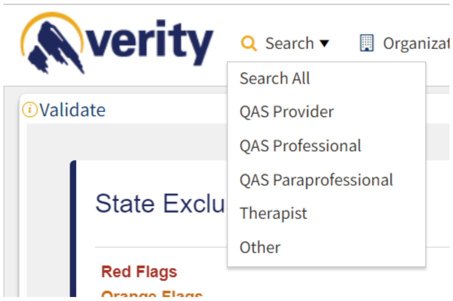


   d. Your environment will then be updated, and it may take a few seconds. You should see the screen refresh. Hover over the Verity logo in the upper left-hand corner to confirm you are now in the correct environment.

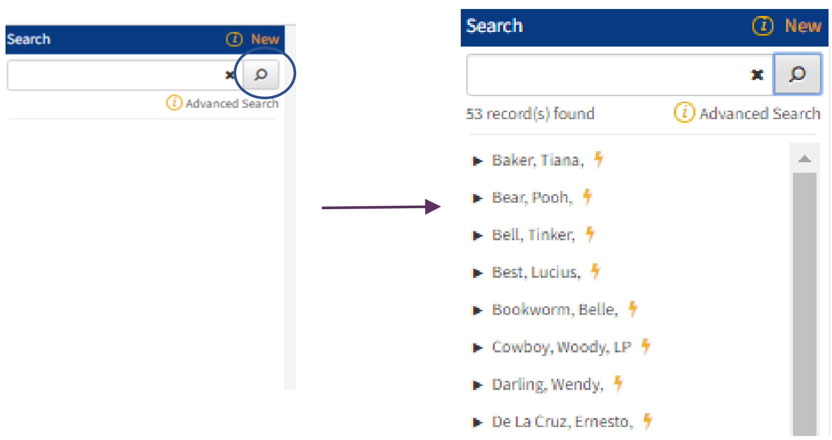
2. Accessing Practitioner Profiles

a. Select “Search” triangle drop down icon in the top row toolbar and select “Search All”

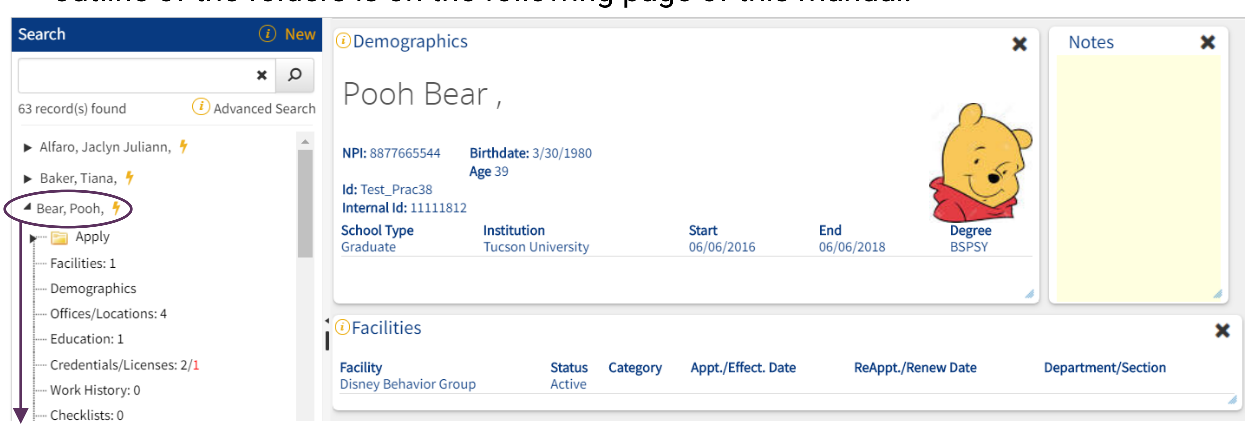
b. On the left, you should see a Search bar appear.



c. You can enter a name, part of a name, or a BHPN Practitioner ID to search for a specific practitioner, or you can leave the search box blank and select the magnifying glass to see all practitioners.



d. By clicking the side triangles besides each name, a drop down of folders will appear and a high-level overview of the profile will appear in the main screen. A detailed outline of the folders is on the following page of this manual.



Overview of a Practitioner Profile & Folders

Each Practitioner's Profile has subfolders for various areas. Below is the list of folders, their purpose, and key information that is contained within each subfolder.

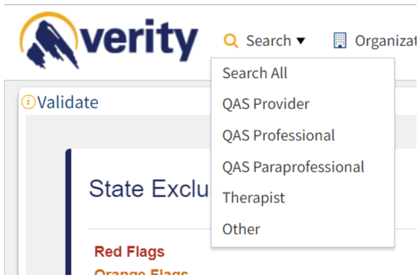
Subfolder	Description of subfolder	Examples of fields in subfolder
Demographics	Pertinent information on the practitioner	Name Birth Date NPI
Facilities	Provider's high-level relationship with the Practitioner	Status (Active/Inactive) Date of Hire Date of Separation
Offices/ Locations	Practitioner's office/location assignments with the Provider	Status (Active/Inactive) Start date with Provider for Clinic End Date with Provider for Clinic
Credentials/ Licenses	Practitioner's Licenses and Credentials	Type of License/Certification Effective Date & Expiration Date
Monitor	List of exclusion lists that the practitioner will be run against, ongoing	OIG SAMs
Verifications	History of all primary source verifications for the practitioner	Date/Time of Verification Result of Verification
Education*	Practitioner's educational history to track education requirements	Educational Institute attended Dates of attendance
Work History*	Practitioner's work history to track experience requirements	Work History- location, dates
Health Status*	Health records indicating compliance with requirements	TB Test Result Immunization Records

*Indicates Optional use of Verity

Registering a new Practitioner with theBHPN

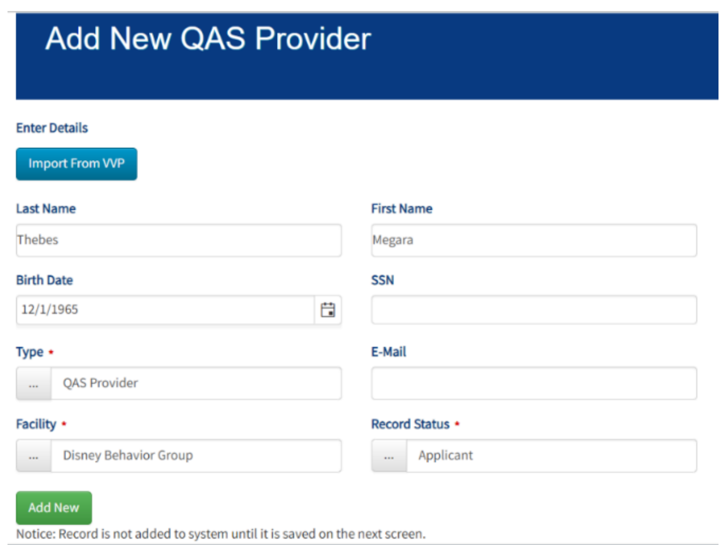
1. Create a New Practitioner Account (DEMOGRAPHICS)

- Select "Search" triangle drop down icon in the top row toolbar and select "Search All"



- On the left, you should see a Search bar appear. Select "New" above the magnifying glass.

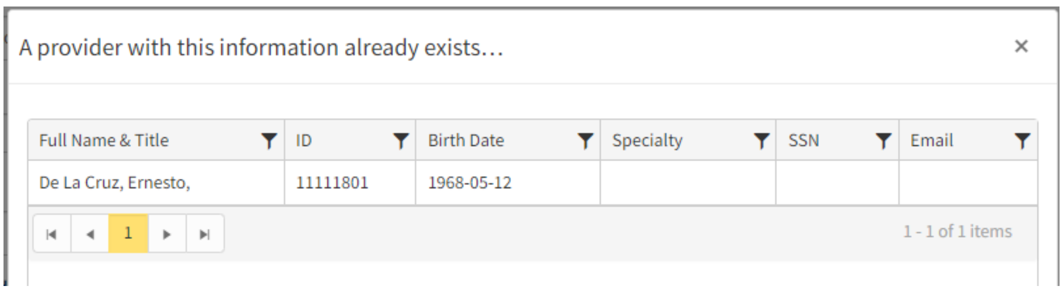
- The Add New window will appear on the right. Complete all fields (except SSN) and select "Add New".



- Select the ellipsis and the drop-down options will appear.
- Select the appropriate drop-down option and the value will be added to the form.
- Email is an optional field; all other fields are required.
- Set Record Status, as follows:
  - APPLICANT while conducting screenings and onboarding
  - ACTIVE once the prac fully meets BHPN requirements.
  - INACTIVE when the prac leaves your organization or is no longer seeing BHPN clients.

- The next screen will require the remainder of the Practitioner's demographic information (DEMOGRAPHIC folder).
    - The BHPN Practitioner ID will be populated in the "BHPN PracID" field as soon as it is issued by BHPN.
    - Don't forget to scroll all the way to the bottom and complete all required fields!
- Select "Save" in the bottom right corner when complete.
- You should now see the Practitioner's Profile.

If you receive a pop-up box stating the Practitioner already exists in the system, please email Quality@theBHPN.org and we will add your Facility to the Practitioner's record. Once this is complete, you will be able to continue with the following steps.

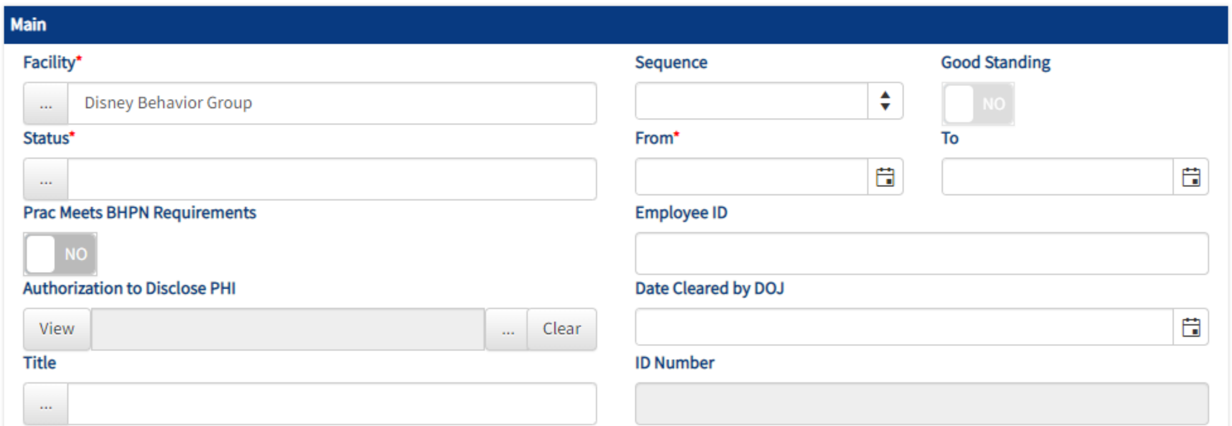


The fields required in DEMOGRAPHICS are as follows:

Field	Definition	Notes
Last Name	Practitioner's Legal Last Name	
First Name	Practitioner's Legal First Name	
Middle Name (or initial)	Practitioner's Legal Middle Name/Initial	
Gender	Practitioner's identified gender	
Type	QAS Role (Prov, Prof, Para)	
NPI	Practitioner's NPI registered with NPPES	
Specialty	The primary service that the practitioner provides	Ex: ABA, ST, OT
Expertise	The primary area of expertise for age groups served.	Ex: Children, Adults, Geriatrics
CAQH ID	CAQH ID number for practitioner	QAS Providers only
BHPN PracID	This is where the BHPN Practitioner ID will populate.	ID will populate when practitioner has been activated by BHPN.

2. Assign the Practitioner to your Organization (FACILITY)

- Select Facilities and complete the information on the Practitioner's relationship with your Organization. Select "Save" in the bottom right corner when complete.

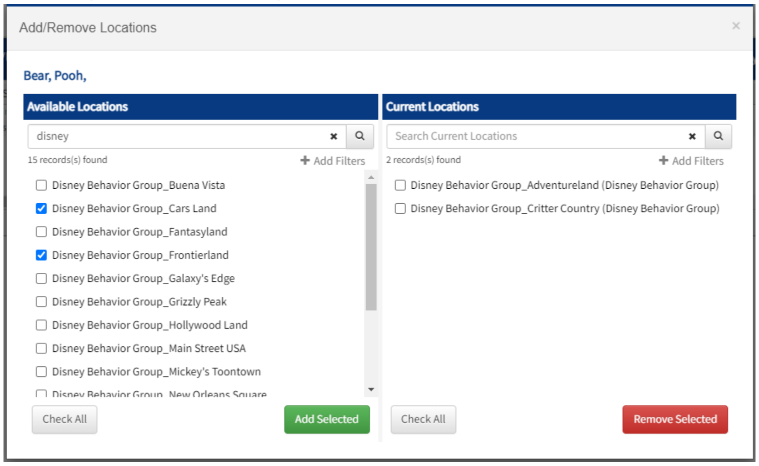


The fields required in FACILITIES are as follows:

Field	Definition	Notes
Status	Status with your organization	Must be set to ACTIVE if the prac is currently seeing BHPN Clients.
From [date]	Date of hire/start date with BHPN Clients	Required field. Should not be before the prac has met all BHPN Requirements.
To [date]	Date of separation/end date with BHPN Clients.	Only to be completed at time of separation or making the prac inactive with BHPN.
Prac Meets BHPN Requirements	Yes/No Toggle bar to indicate whether Prac meets all Prac Requirements as outlined in the BHPN Provider Manual.	Only Pracs marked as YES for this field will be registered with theBHPN.
Employee ID	*Employee ID number for your organization*	*Not required by BHPN*
Authorization to Disclose PHI	Authorization to Disclose PHI (medical screening) to BHPN	*Not required by BHPN*
Date DOJ Cleared	This is the date that your organization received DOJ clearance results for this practitioner.	*Not required by BHPN* *This should always be prior to the practitioner's start date.*

3. Assign the Practitioner to the appropriate Clinics (OFFICES/LOCATIONS)

- Select Offices/Locations from the left-hand navigation
- Select "Add Office/Location" (the green button in the upper right corner of the screen). The box of Offices & Locations will appear.
- **Enter your company name in the Search Box and select "Search"**



- Select your Clinic that the practitioner works at and select "Add Selected"
- Complete the details for this Clinic (see grid below)
- Click Save in the bottom right corner
- If the practitioner works at multiple clinics, repeat the above steps for all clinics that the Practitioner works at.

The fields required in OFFICE/LOCATION are as follows:

Field	Definition	Notes
Facility	Your Organization/Company	Please select your Company.
Status	The status of the practitioner with this clinic (Active or Inactive)	Please Select Active if registering a new Practitioner.
Effective Date	Start date of the practitioner at this Clinic.	
Termination Date	Last date practitioner worked at this clinic	Only enter a date here when the practitioner leaves your organization and/or is no longer working at this clinic.
Accepting New Members	Yes/No whether the Practitioner has capacity for any new clients.	Yes/No switch button
Full Time Equivalent	Yes/No whether the Practitioner works at this Clinic Full-Time	Yes/No switch button
Percentage of Time at HOME	The percentage of the Prac's time doing homebased care.	Enter a whole number between 1 and 100 for each. The sum of Home & Clinic should equal 100.
Percentage of Time at CLINIC	The percentage of the Prac's time doing Clinic-based care.	

4. **Add the Practitioner's Certificate(s) & License(s) (CREDENTIALS/LICENSES)**
   - Select "Credentials/Licenses" from the left-hand navigation, under the Practitioner's Profile, and select "Add Credentials/Licenses" in the upper right corner.
   - Complete the required fields (noted below)
   - Select Save.
   - Scroll to the bottom of the screen, select "Normal" as the VerifyNow Mode, and select "Verify Now"
   - A new box will pop-up with the results of the Verification.
   - Review the results of the Verification (at the bottom in the grey box)
   - Based on the review of the results, update the following fields:
     - Tickler Status: the results of your review
       - Verified = License/Credential meets all requirements and has been successfully validated with the Primary Source
       - No Matches Found = No record of the License/Credential with the Primary Source (Prac is unable to work in BHPN until resolved)
       - Red Flag = License or Credential has a sanction or limitation (Prac is unable to work in BHPN until resolved)
     - Tickler Date: the date you reviewed the results

The fields required in this section are as follows:

Field	Definition	Notes
License and Certification Types	Whether the credential is a License or a Certificate.	Cert Ex: BCBA Lic Ex: MFT
Facility	Your Organization	Ex: Disney Behavior Group
Institution	The Board that issued the Certification or License	ex: BACB, BBS, etc
Certificate/License #	Practitioner's License/Certificate Number, as issued by the Board	
Certificate/License Status	Status of the License/Certificate with the Issuing Board	Active or Inactive
State (of Issue)	State that issued the License/Certificate	Should be CA for all BHPN Pracs
Certification/Provider Type	The category of Certification/License	
Issue Date	Date the Issuing Board issued the original License/Certificate	
Expiration Date	Current Expiration date of the License/Certificate	
Active?	Whether the License/Certificate is Active	Active or Inactive

5. **Submit the Practitioner for Exclusion & Screening Monitoring (MONITOR)**
   - Select All checkboxes on the Monitoring Tab
   - Select "Send"
   - The results can take anywhere from 10-minutes to a couple of hours to process.

6. **Confirm the Practitioner's Exclusion & Screening Statuses (VERIFICATIONS)**
   - Go to the Verifications tab and review the results of the Exclusion & Screening Monitoring Results as outlined in the Verifications section of this Guide.

Verifications

One of the primary functions of Verity is to Verify each Practitioner's Licenses, Certifications, and sanctions.

1. Verification Timelines

- Verity will automatically run each practitioner's license/credential against the Primary Source/ Issuing Board every month to verify their status.
- Verity will run each Practitioner against all exclusion lists and the NPI registry monthly to verify their status and eligibility to participate in the BHPN.

2. Verification Notifications

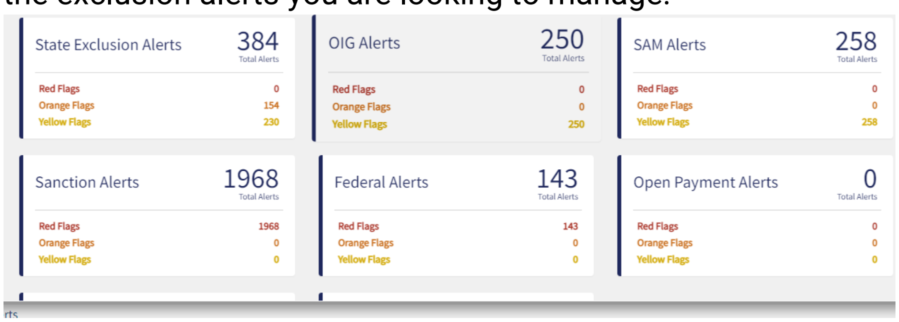
Any time Verity finds a hit, or a potential hit, on any of the lists, you will be alerted via the "Validate" box on your Verity Dashboard. They will appear in the following categories:

- Red Flags: Identical match between practitioner data in Verity and information on an Exclusion list; Exclusion Identified
- Orange Flags: Commonalities identified between practitioner data in Verity and information on Exclusion list; likely Exclusion identified
- Yellow Flags: Potential commonalities identified between practitioner data in Verity and information on Exclusion list; possible Exclusion identified

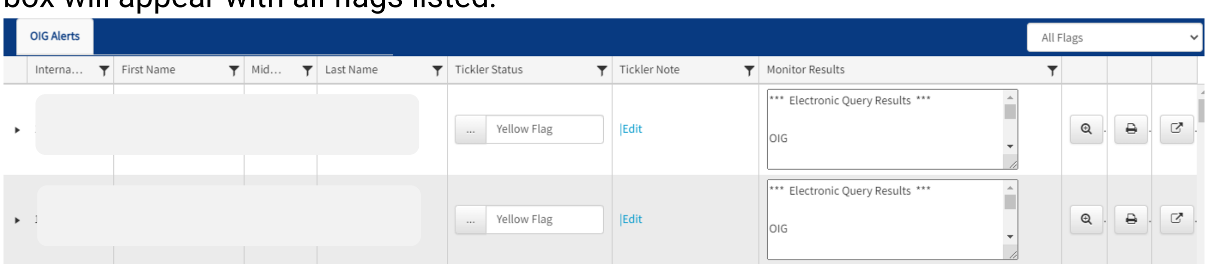
3. Managing Verifications:

All Flags must be reviewed by the Provider and updated in Verity, as follows:

- Select the exclusion alerts you are looking to manage:



- A new box will appear with all flags listed:



- Scroll through the "Monitor Results" for that individual to review the results of the verification.

- Review the results to identify if the verification result is for the same individual, checking the following:
    - Full Name
    - Any former names used by the individual (maiden name, previous married name, etc.)
    - Date of Birth
    - Past workplaces
    - Past residents

- If the individual found on the Exclusion list is the same individual as the practitioner, the individual does not qualify to provide services in the BHPN. Update the Tickler Status to Flag Reviewed and alert BHPN Quality of the exclusion immediately.

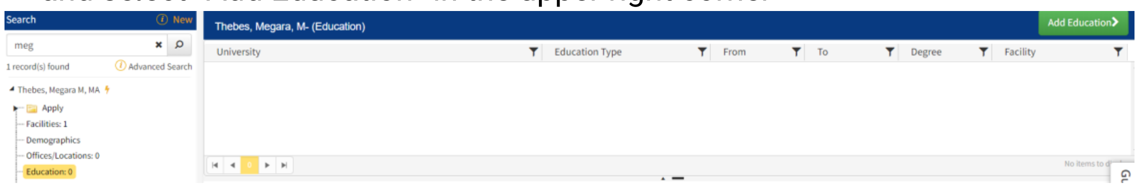
- If the individual found on the Exclusion list is not the same individual as the practitioner, update the Ticket Status to False Positive.

Optional Verity Resources

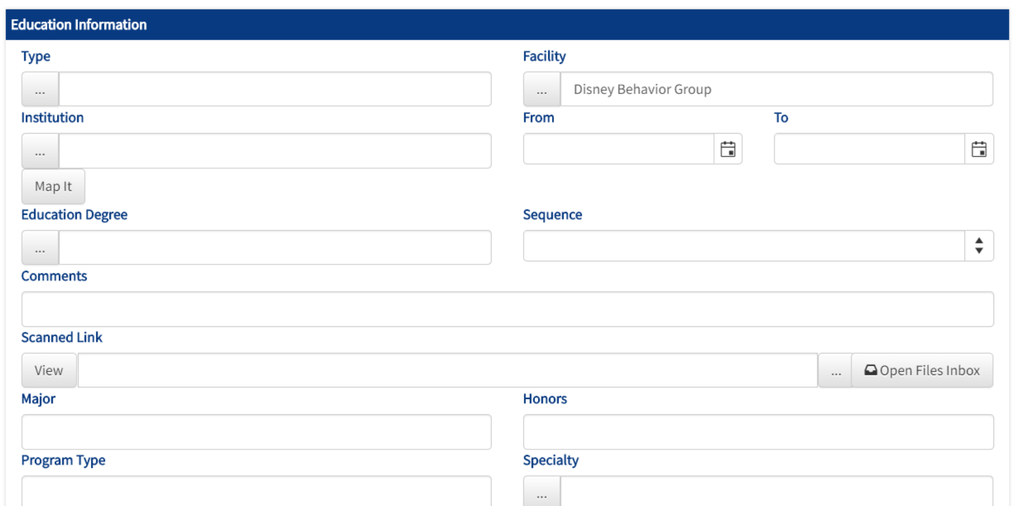
The following steps are optional if the Provider would like to utilize Verity as a resource to track and manage practitioner requirements and documentation.

1. Add the Practitioner's Education Record (EDUCATION)

- Select Education from the left-hand navigation, under the Practitioner's Profile, and select "Add Education" in the upper right corner



- Complete the Education Information for the highest degree held by the Practitioner and click Save in the bottom right corner.

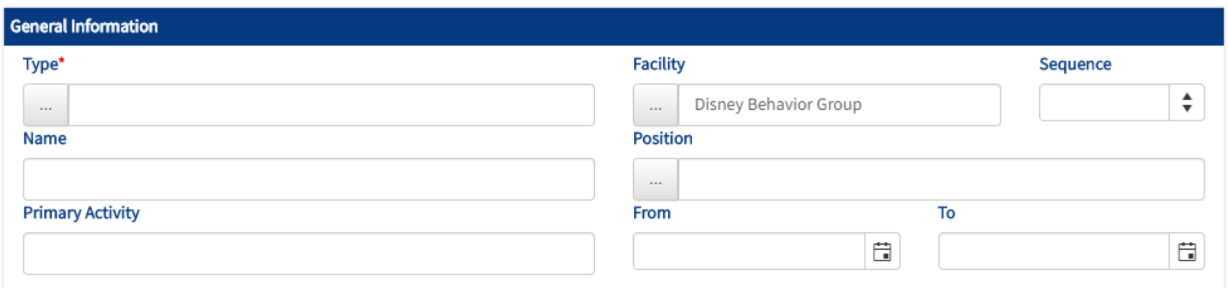


Helpful fields in this section:

Field	Definition	Notes
Facility	Your Organization	Ex: Disney Behavior Group
Type	Type of Degree/Education	Ex: Undergraduate
Institution	The Institution that the Practitioner attended	ex: UC Davis
Education Degree	Type of Degree issued by the Institution	Ex: Master of Arts (MA)
Program Completed	Indicate whether (Y) or not (N) the Practitioner completed the Program, resulting in a degree being issued.	Y/N

2. Add the Practitioner’s Work History (WORK HISTORY)

- Select Work History from the left-hand navigation, under the Practitioner’s Profile, and select “Add Work History” in the upper right corner.
- Ensure that the Facility is your Organization (this does not mean that the experience is with/at your Facility)
- Complete all fields
- Click save in the bottom right hand corner.
- Continue to add Work History records until the work history entered meets the experience requirements for the role that the Practitioner is being registered as.

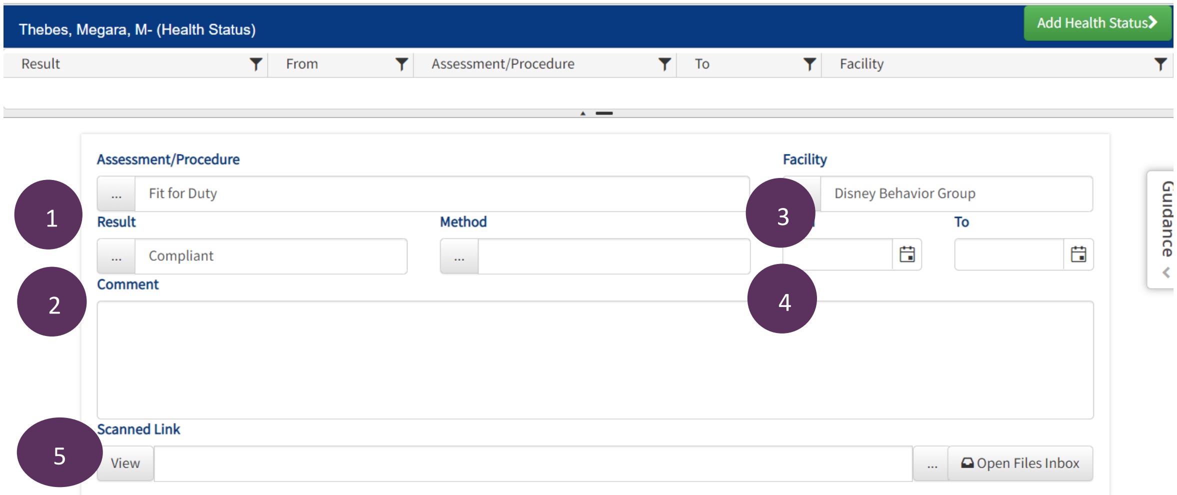


Helpful fields in this section:

Field	Definition	Notes
Work History Type	Workplace type	Use Work History
Facility	Your Organization	Ex: Disney Behavior Group
Name	Name of the workplace	ex: Pixar Behavior Group
Position	The position held by the practitioner at the workplace	Ex: Clinician
From/To	The start (from) and end (to) dates of the work experience at this workplace.	

3. Add the Practitioner's Health Screening (HEALTH STATUS)

- Select "Health Status" from the left-hand navigation, under the Practitioner's Profile, and select "Add Health Status" in the upper right corner.



- Indicate the **Result** of the immunization/immunity/titer:
    - Compliant (cleared proof of capability / proof of immunity via vaccination)
    - Immune by Titer (if titer conducted and showed immunity)
    - Decline (for HepB and Tdap if declined by practitioner)

- Ensure that the **Facility** is set to your organization
- Complete the "**From**" field with the date that the assessment/procedure was completed.
- Upload the documentation of the assessment/procedure via "**Scanned Link**". Click the ellipsis ("…") to access your documents
- Select Save in the bottom right corner.

Bolt Reports

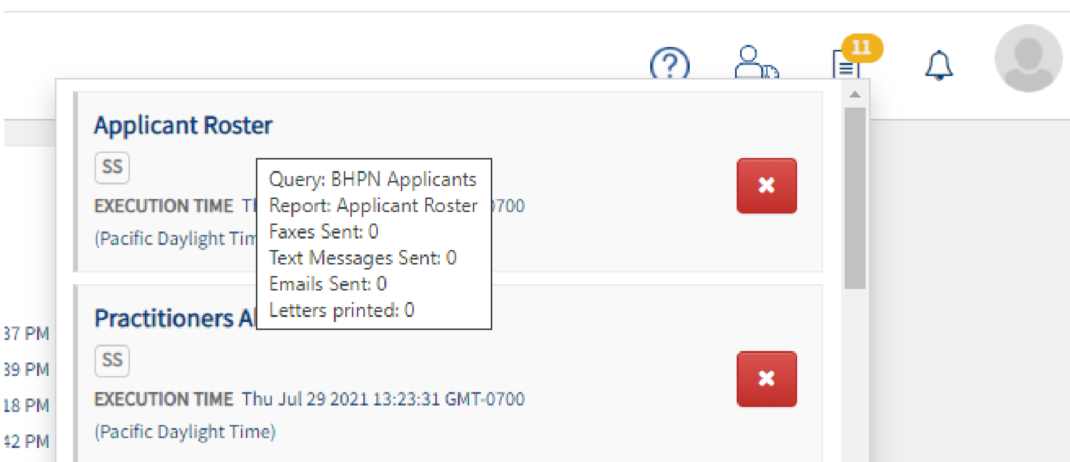
The following reports are available via your Bolt Box on your Dashboard. To run any of these reports just click on the name of the report you'd like to run. The report will open a new browser tab and download as an excel file.

Below are the reports available:

Report Name	Report Includes:
BHPN Applicant Roster	List of Practitioners in Applicant Status with Provider
Current Practitioner (Active)	List and details of all Practitioners that are Active with Provider
Pracs Needing BHPN PracID	List of Pracs that are noted as meeting all BHPN requirements, and do not have a BHPN PracID
Practitioner Status Report	List of all Practitioners tied to Provider Facility with their Status
Practitioners All-Time	Includes all Applicant, Active, and Inactive pracs

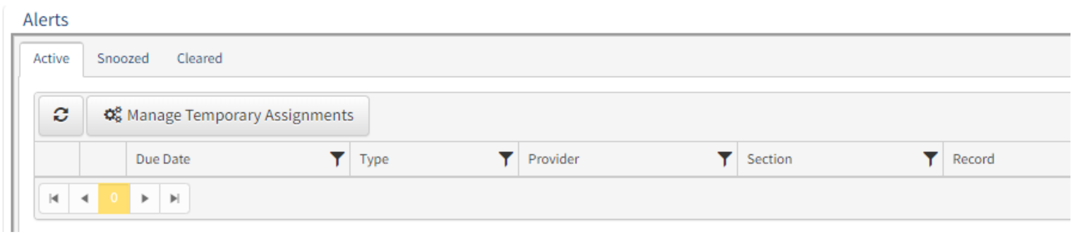
To run a BOLT report:

- From your homepage dashboard, go to the BOLT Reports widget
- Select the Name of the report you want to run.
- A pop-up will appear letting you know that the report is generating. Click OK
- Select your Notifications Icon in the upper right corner of your screen
- The Notification Icon looks like a notepad/piece of paper and is directly to the left of the bell icon along your top right navigation
- All reports you've run will appear in a drop-down box.
- Select the name of the report to open the report.
- The repot will download into an excel file that you will need to open from the downloads box, or in the bottom left part of your internet browser.

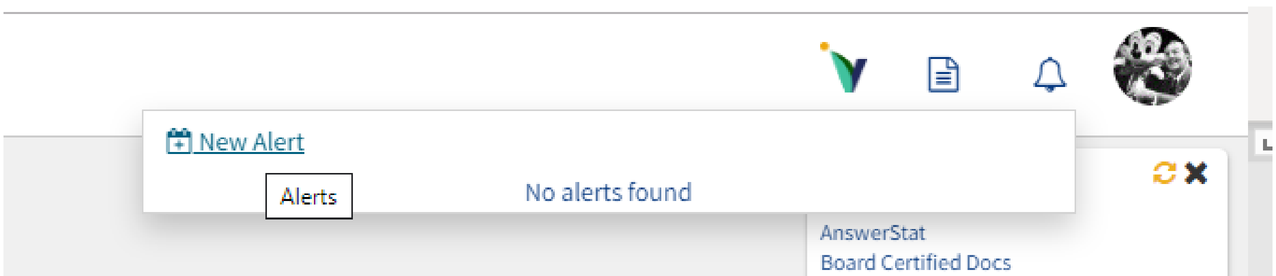


Tasks

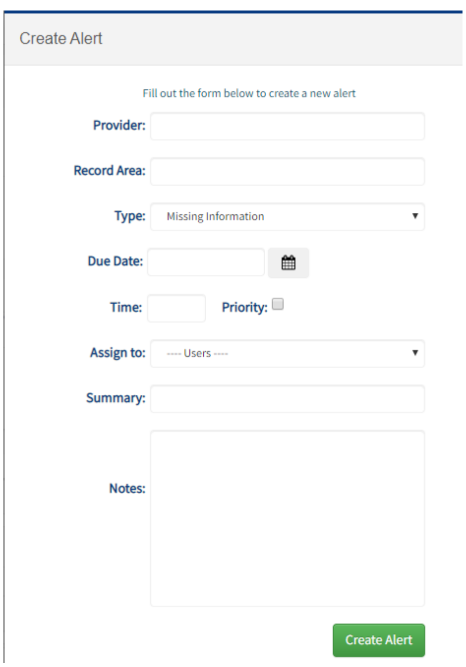
- Your Alerts box will show you any Tasks or Alerts assigned to you.



- To Assign a new task, select your Alerts icon (the bell to left of your profile image)



- Select "New Alert", complete the fields, and select "Create Alert"



- Provider = the Practitioner record the task is related to
- Record Area = the folder of the Practitioner the task is related to
- Type = Select the category that best matches your task
- Due-Date = If assigning to someone at BHPN, please set the due-date for 2-business days from the date of the task assignment.
- Assign To: Select the individual you're assigning the ticket to. If assigning to BHPN please select your BHPN QA Manager.
- Summary = brief description of your request/task
- Notes = details related to your request/task

Appendix: List of all Fields Required by Folder

Field	Definition	Folder
BHPN PracID	BHPN Practitioner ID	Demographics
Last Name	Practitioner's Legal Last Name	Demographics
First Name	Practitioner's Legal First Name	Demographics
Middle Name	Practitioner's Legal Middle Name/Initial	Demographics
Gender	Practitioner's identified gender	Demographics
Type	QAS Role (Prov, Prof, Para)	Demographics
Specialty	Specialty (ABA, ST, OT)	Demographics
Expertise	Population Expertise (Child, Adult, Geriatric)	Demographics
NPI	Practitioner's NPI registered with NPPES	Demographics
CAQH ID	CAQH ID number for practitioner	Demographics
Birth Date	Date of Birth of Practitioner	Demographics
Languages	Languages spoken by Practitioner	Demographics
Facility	Your Organization	Facility
Status	Status with your organization APPLICANT while you're working on conducting all screenings and onboarding ACTIVE once the prac fully meets BHPN requirements. INACTIVE when they leave your organization.	Facility
From [date]	Date of hire/start date with BHPN Clients (and your Organization)	Facility
To [date]	Date of separation/end date with BHPN Clients (and your Organization)	Facility
Prac Meets BHPN Requirements	Yes/No Toggle bar to indicate whether Prac meets all Prac Requirements as outlined in the BHPN Provider Manual. Only Pracs marked as YES for this field will be registered with theBHPN.	Facility
Facility	Your Organization	Office/Locations
Status	The status of the practitioner with this clinic (Active or Inactive)	Office/Locations
Effective Date	Start date of the practitioner at this Clinic.	Office/Locations
Termination Date	Last date practitioner worked at this clinic	Office/Locations
Accepting New Patients	Yes/No whether the Practitioner has capacity for any new clients.	Office/Locations
Percentage of Time at CLINIC	The percentage of the Practitioner's time that is spent at this Clinic.	Office/Locations
Percentage of Time at HOME	The percentage of the Practitioner's time that is spent providing home-based services.	Office/Locations
Full Time Equivalent	Yes/No whether the Practitioner works at this Clinic Full-Time	Office/Locations

Facility	Your Organization	Credentials/licenses
License and Certification Types	Whether the credential is a License or a Certificate.	Credentials/licenses
Institution	The Board that issued the Certification or License	Credentials/licenses
Certificate/License #	Practitioner's License/Certificate Number, as issued by the Board	Credentials/licenses
Certificate/License Status	Status of the License/Certificate with the Issuing Board	Credentials/licenses
Certification/Provider Type	Type of Certification/License (MFT, LCSW, PsyD, etc.)	Credentials/licenses
State (of Issue)	State that issued the License/Certificate	Credentials/licenses
Issue Date	Date the Issuing Board issued the original License/Certificate	Credentials/licenses
Expiration Date	Current Expiration date of the License/Certificate	Credentials/licenses
Active?	Whether the License/Certificate is Active	Credentials/licenses