

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 Training 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.

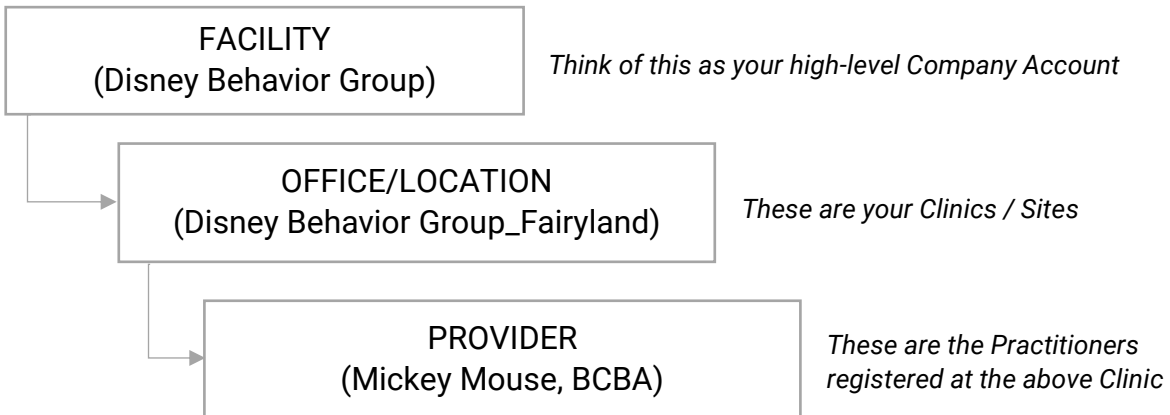
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Verity Definitions

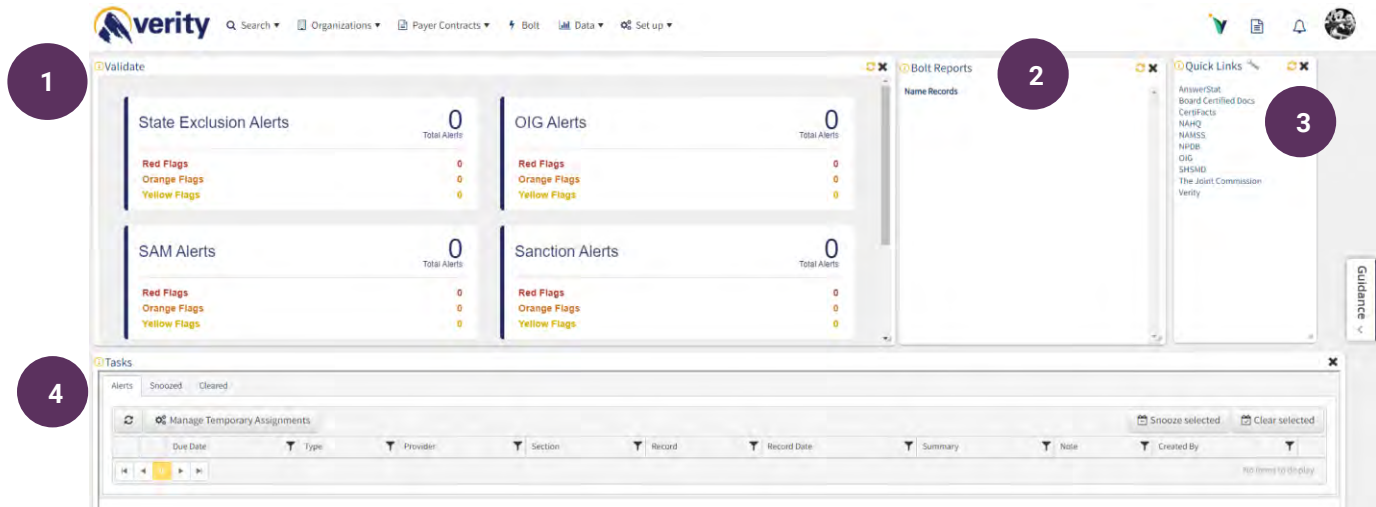
Verity Term	BHPN/Common Term	Example
Facility	BHPN Provider Company Account	Disney Behavior Group
Office/Location	Provider's Clinic	Disney Behavior Group_Disneyland
Provider	Practitioner	Mickey Mouse, BCBA

Verity Provider/Clinic/Practitioner Structure:



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.



1: Validate Box:

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.

2: Bolt Reports Box:

This box will give you quick access to pre-created reports on your Practitioners. See the Section on Bolt Reports for additional information.

3: Quick Links Box:

This box gives you quick links to industry websites, such as the BACB and OIG.

4: Tasks/Alerts Box:

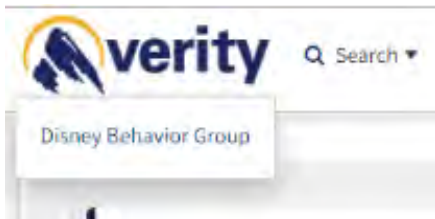
This box gives you quick access to all tasks or alerts assigned to you. See the section on Tasks for additional information.

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.

Change Facility

Search Options:

Search by code

OR

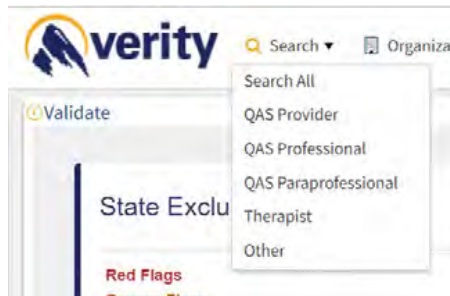
Search by text

Fac Code	Fac Name	Misc.
DBG	Disney Behavior Group	Edit

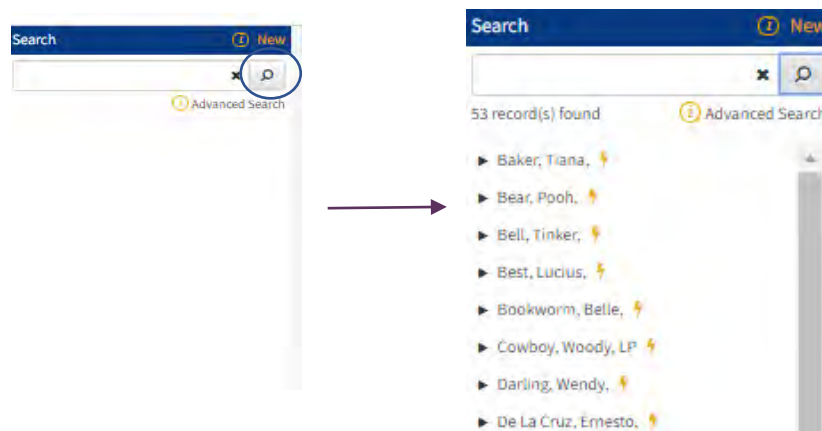
- d. Your environment will then be updated, and it may take a few seconds. You should see the screen refresh. Hover over the Verity logo in the upper left-hand corner to confirm you are now in the correct environment.

2. Accessing Practitioner Profiles

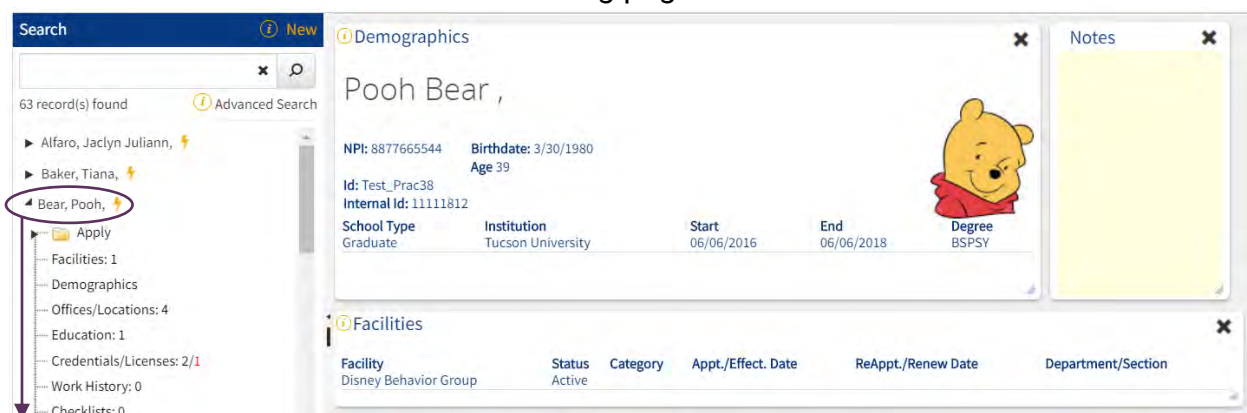
- Select "Search" triangle drop down icon in the top row toolbar and select "Search All"
- On the left, you should see a Search bar appear.



- 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.



- 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

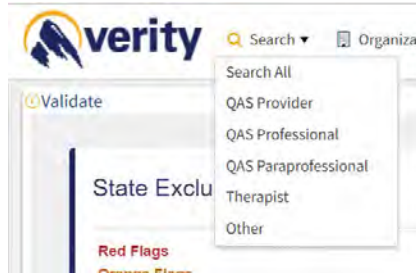
Each Practitioner's Profile has subfolders for various areas. Below is the list of folders, their purpose, and key information that is contained within each subfolder.

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 clinic assignments with the Provider	Status (Active/Inactive) Start date with Provider for Clinic End Date with Provider for Clinic
Education	Practitioner's educational history	Educational Institute attended Dates of attendance
Credentials/ Licenses	Practitioner's Licenses and Credentials	Type of License/Certification Effective Date & Expiration Date
Work History	Practitioner's work history (for experience requirements)	Work History- location, dates
Communications	Copies of communications sent to Practitioners by Providers	Email alerting practitioner of missing information in application
Health Status	Copies of health records indicating compliance with BHPN Practitioner requirements	TB Test Result Immunization Records
Monitor	List of exclusion lists that the practitioner will be run against, ongoing	OIG SAMs
Expertise	Areas of Expertise for the Practitioner	ABA, ST, OT Child/Adolescent, Adult, Geriatrics
Alert History	History of all alerts for the Practitioner on exclusion and license checks	Exclusion Identified Date/Time of Identification
Verifications	History of all primary source verifications for the practitioner	Date/Time of Verification Result of Verification
Workflows	History of all audits/reviews of the practitioner file	Result of Action/Workflow
Apply	Record of online application submitted (if applicable)	Submitted applications
Online Forms Login	Log of times practitioner has logged into access online forms (using APPLY)	Date/Time of login
Verity Connect Logs	Log of times practitioner has logged into complete applications (using APPLY)	Date/Time of login
Login Info	Practitioner's Login Information (not password)	Login Email/ID Most recent Date logged into Verity
Application Review	Log of submitted applications (using APPLY) by the practitioner	Applications Submitted Status of Applications Submitted
Signed Documents	List of APPLY applications signed by the Practitioner	Documents Signed Date Documents Signed

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 to APPLICANT

A screenshot of the "Add New QAS Provider" form. The form is titled "Add New QAS Provider" and has a blue header. Below the header, there is a section for "Enter Details" with a button labeled "Import From VVP". The form contains several input fields: "Last Name" (Thebes), "First Name" (Megara), "Birth Date" (12/1/1965), "SSN", "E-Mail", "Type" (QAS Provider), "Facility" (Disney Behavior Group), and "Record Status" (Applicant). There is a green "Add New" button at the bottom. A notice at the bottom states: "Notice: Record is not added to system until it is saved on the next screen."

- The next screen will require the remainder of the Practitioner’s demographic information (DEMOGRAPHIC folder).
 - The ID field must be left blank. The BHPN Practitioner ID will be populated in this 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.

Name Information

Last Name: Thebes

First Name: Megara

Middle Name: M

Suffix: ...

Salutation: ...

Gender: Female

Birth Date: 12/01/1965

Death Date:

ID:

Identification Numbers

CAQH ID: 0

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
ID	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)

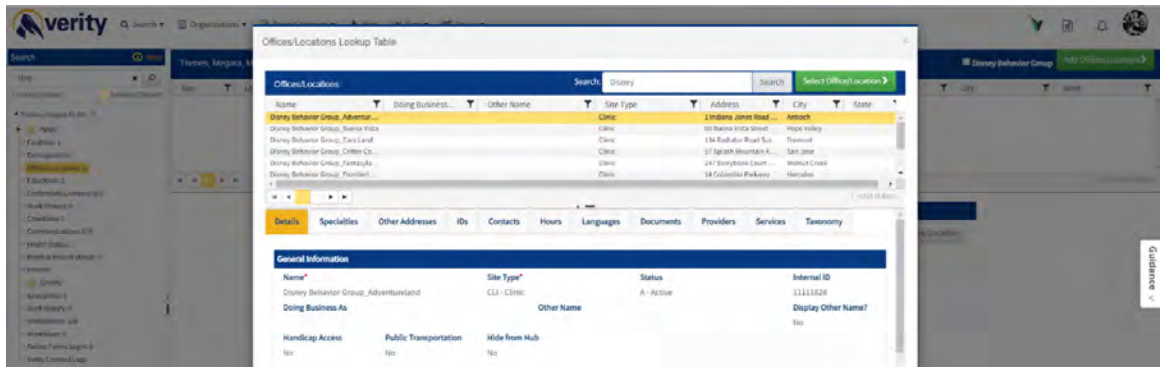
- Select Facilities and complete the information on the Practitioner's relationship with your Organization. Select "Save" in the bottom right corner when complete.

The fields required in FACILITIES are as follows:

Field	Definition	Notes
Status	Status with your organization	Should be "APPLICANT" if you are registering them to BHPN for your organization.
From [date]	Date of hire/start date with BHPN Clients	This is the "Hire Date" field from the Prac Workbook
To [date]	Date of separation/end date with BHPN Clients.	This is the "Separation Date" field from the Prac Workbook (only applies at time of separation)
Authorization to Disclose PHI	Authorization to Disclose PHI (medical screening) to BHPN	Upload the authorization form to this field by selecting the "..." icon.
Date DOJ Cleared	This is the date that your organization received DOJ clearance results for this practitioner.	By entering the date here, you are attesting that the practitioner complies with BHPN DOJ background requirements.
Employee ID	Employee ID number for your organization	Not required by BHPN; here for individual provider use, if desired.

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

- Select Offices/Locations from the left-hand navigation, under the Practitioner's Profile.
- 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(s) that the practitioner works at and select "Select Office/Location"
- Complete the details for this Clinic (see grid below)
- Click Save in the bottom right corner
- If the practitioner works at multiple clinics, repeat steps b-f 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 Practitioner's time spent doing homebased care.	Enter a whole number between 1 and 100
Percentage of Time at CLINIC	The percentage of the Practitioner's time that is spent at this Clinic.	Enter a whole number between 1 and 100

4. Add the Practitioner's Education Record

**This is only required for QAS Professionals*

- 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.

The fields required in this section are as follows:

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

5. Add the Practitioner's Work History

**This is only required for QAS Professionals*

- 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.

General Information

Type*

...

Name

Primary Activity

Facility

...

Disney Behavior Group

Position

...

From

To

Sequence

The fields required in this section are as follows:

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.	

6. 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.

- Add each of the following **Assessment/Procedures**:
 - Fit for Duty (Proof of Capability to Perform Services)
 - Measles, Mumps, and Rubella (MMR)
 - Varicella
 - Hepatitis B (Declination acceptable)
 - Tdap (Pertussis) (Declination acceptable)
 - TB

**If you have all of the above on one form or in one file, please select "Fit for Duty" as the Assessment/Procedure; you do not need to upload the same file for each of the above listed assessment/procedures.*

- For each of the above, 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.

7. 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 (results are at the bottom in the grey box).

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 Practitioners
Provider Type	The category of 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

8. 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. BHPN will review the results as part of their review & registration process; proceed to the next step.

9. Submit the Practitioner for BHPN Review & Registration

- Select “Workflows” from the left-hand navigation, under the Practitioner’s Profile, and select “Add Workflow” in the upper right corner.
- Select the Workflow titled “INIT: BHPN Prac Registration” from the Workflow dropdown
- Select “Current” as the Status
- Select your Facility as the Facility
- Select “Save” in the bottom right corner

The screenshot displays the BHPN-Verity system interface. On the left is a navigation menu for the practitioner 'Bear I, Pooh', listing various categories and counts: Apply, Facilities: 1, Demographics, Offices/Locations: 2, Education: 1, Credentials/Licenses: 2/2, Work History: 0, Checklists: 0, Communications: 32/32, Expertises: 1, Health Status: 1/0, Monitor, Quality, Specialties: 0, Alert History: 0, Verifications: 21/0, Workflows: 0 (highlighted in yellow), and VerityStream Connect Logs. The main content area shows the 'Workflow' configuration page with the following fields:

- Workflow:** A dropdown menu currently showing 'BHPN Prac Registration'.
- Status:** A dropdown menu currently showing 'Current'.
- Facility:** A dropdown menu currently showing 'Disney Behavior Group'.
- Contract:** A dropdown menu currently showing an empty field.

Verifications

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

1. Verifying Licenses & certifications:

- When you add the Credentials/License folder, select "VerifyNow" at the bottom of the screen. This will conduct the initial Verification of the License/Certification.
- The License/Certification will then be scheduled for verification based on the expiration date. Your Expirables Alerts box on your Verity Dashboard will alert you when any of the following have/are occurring:
 - **Expired License:** License/Certification has expired and does not have an updated renewal.
 - **License Expiring <90 Days:** License/Certification has an expiration date coming up in the next 90-days

2. Verifying against the Exclusion Lists:

- When BHPN activates your practitioner, BHPN adds Exclusion & Sanction List monitoring to the Practitioner's Profile (viewable in the Monitoring folder).
- Any time Verity finds a hit, or a potential hit, on one 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

Bolt Reports

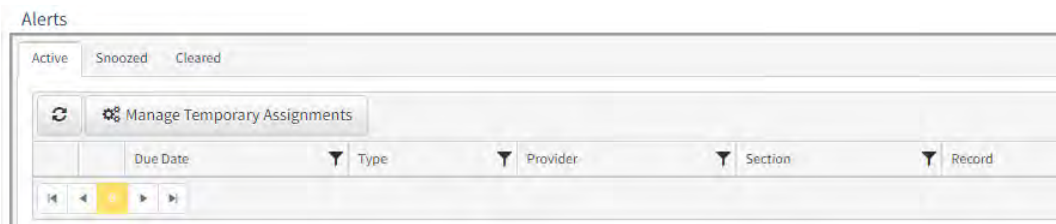
The following reports are available via your Bolt Box on your Dashboard. To run any of these reports just click on the name of the report you'd like to run. The report will open a new browser tab and download as an excel file.

Below are the reports available:

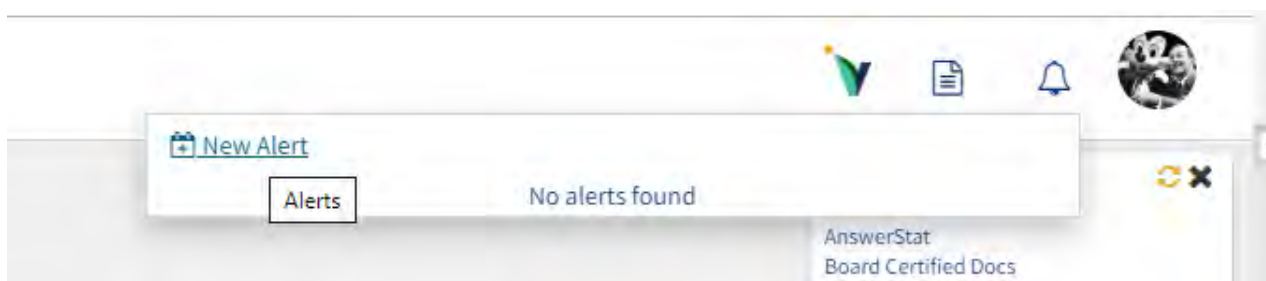
Report Name	Report Includes:
Active Practitioner Roster	List and details of all Practitioners that are Active with your organization/Facility.
Applicant Practitioner Roster	List of Practitioners in Applicant Status
All Practitioner Roster	Includes all practitioners ever registered with Provider organization/Facility (Active and Inactive)

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 "Francesca Reyes"
- 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
ID	BHPN Practitioner ID	Demographics
Last Name	Practitioner's Legal Last Name	Demographics
First Name	Practitioner's Legal First Name	Demographics
Middle Name (or initial)	Practitioner's Legal Middle Name/Initial	Demographics
Gender	Practitioner's identified gender	Demographics
Type	QAS Role (Prov, Prof, Para)	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
Gender	Practitioner's identified gender	Demographics
Languages	Languages spoken by Practitioner	Demographics
Facility	Your Organization	Facility
Status	Status with your organization APPLICANT to register; 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
Date DOJ Cleared	This is the date that your organization received DOJ clearance results for this practitioner.	Facility
Specialty	Specialty (ABA, ST, OT)	Facility
Expertise	Population Expertise (Child, Adult, Geriatric)	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	Education
Type	Type of Degree/Education	Education

Institution	The Institution that the Practitioner attended	Education
From/To	The start (from) and end (to) dates of the work experience at this workplace.	Work History
Education Degree	Type of Degree issued by the Institution	Education
Program Completed	Indicate whether (Y) or not (N) the Practitioner completed the Program, resulting in a degree being issued.	Education
Facility	Your Organization	Work History
Work History Type	Workplace type	Work History
Name	Name of the workplace	Work History
Position	The position held by the practitioner at the workplace	Work History
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
Provider Type	Type of 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