

JOB AID

Viewing and Updating Taxonomies on the Provider Profile in NCTracks

OVERVIEW

This Job Aid provides step-by-step instructions for viewing and updating taxonomy codes for NCTracks provider profiles via a Manage Change Request application. Only authorized users can view or update provider taxonomies in NCTracks.

Note: Adding a new taxonomy code via a Manage Change Request is not an immediate process and can take several weeks to complete, as licensing and accreditation must be reviewed by CSRA and approved by the State.

Note: The taxonomy code on a provider’s claim or prior approval request must match the taxonomy code on the provider’s record, or the claim will deny.

LOGGING INTO THE PROVIDER PORTAL

1. Navigate to www.nctracks.nc.gov.
2. The **NCTracks Home** page displays. Select the **Providers** tab at the top of the page.

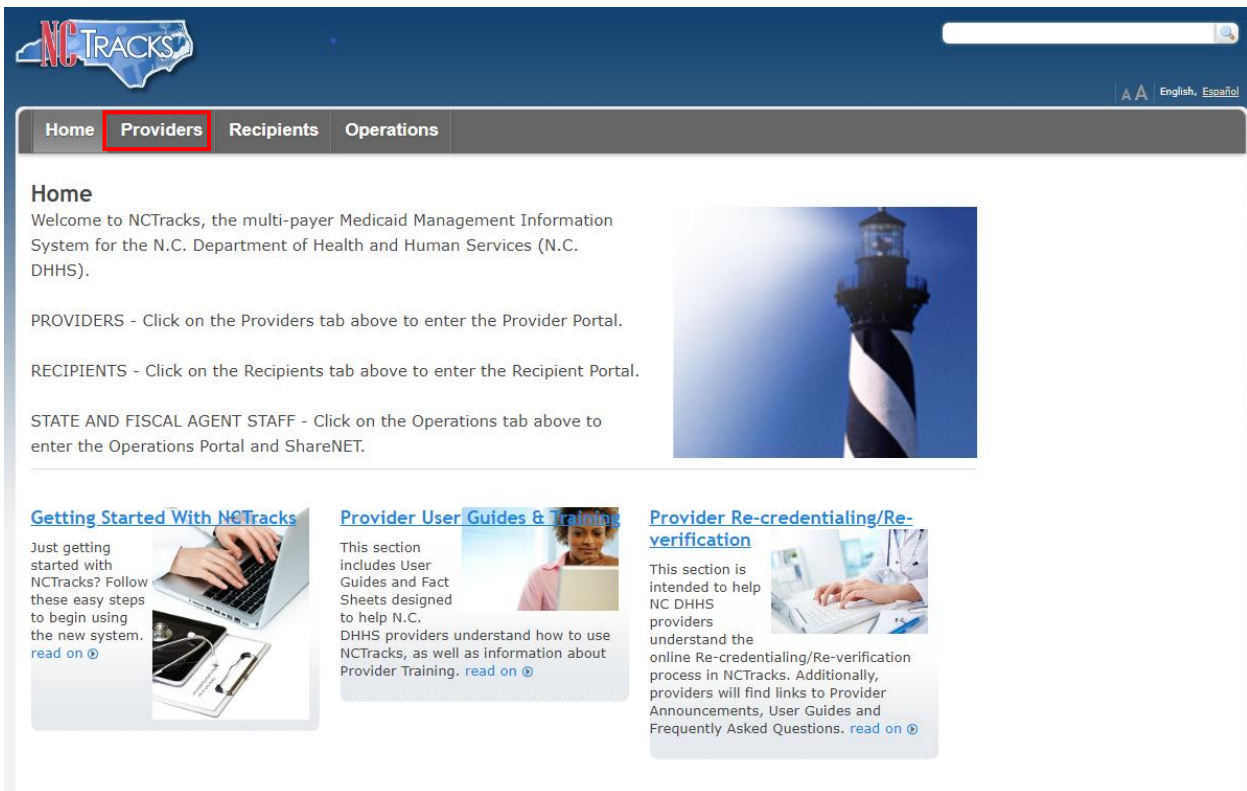


Exhibit 1. NCTracks Home Page

3. The public **Providers** page displays. Select the **NCTracks Secure Portal** icon.

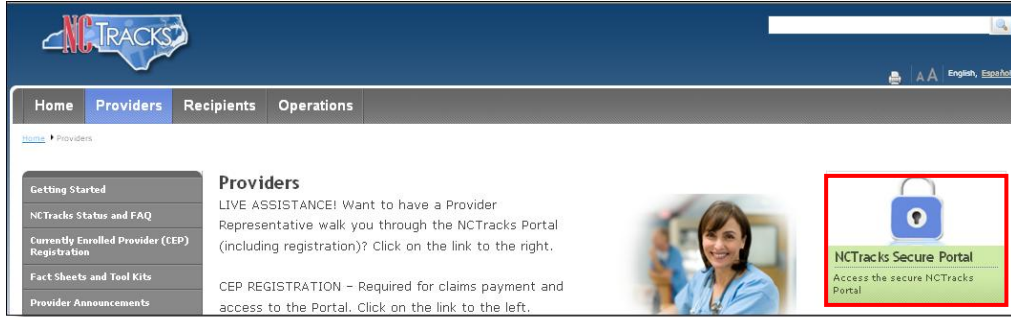


Exhibit 2. Providers Page

4. The **Provider Portal Login** page displays. Enter the **NCID** and **Password** and select the **Log In** button.

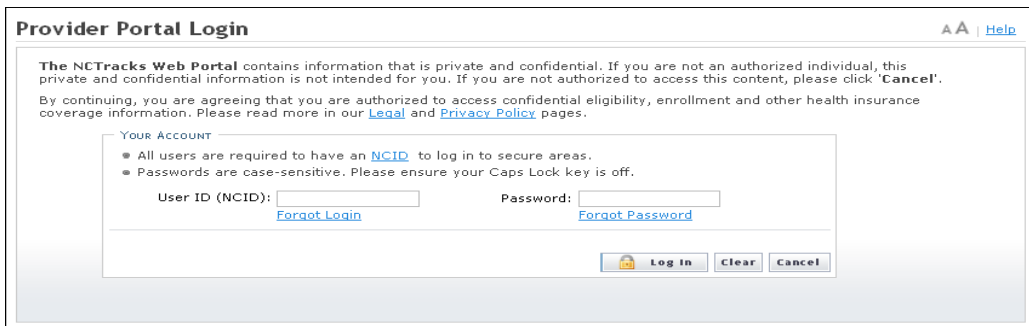


Exhibit 3. Provider Portal Login Page

ACCESSING THE MANAGE CHANGE REQUEST APPLICATION

1. The secure **Provider Portal Home** page displays. Select the **Status and Management** button.

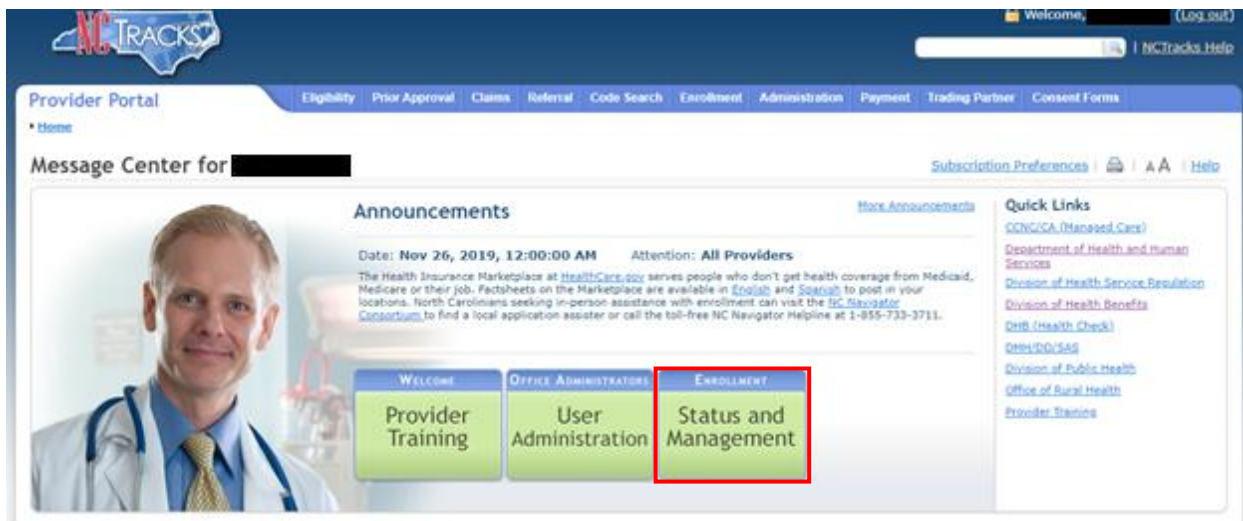


Exhibit 4. Secure Provider Portal Home Page

The **Status and Management** page displays.

Provider Portal

Home > Status and Management

Eligibility | Prior Approval | Claims | Referral | Code Search | **Enrollment** | Administration | Payment | Trading Partner | Consent Forms

Contact Information

If you have any questions regarding completion of Provider Enrollment, please contact CSRA Call Center.
 Phone: 800-688-6696
 Fax: 855-710-1965
 Email: NCTracksprovider@nctracks.com

Quick Links

- Online Application
- Advanced Medical Home Tier Attestation
- Health Information Exchange (HIE) Status
- Provider Enrollment Home
- PE Supporting Information
- PE Terms and Conditions
- Reassign Existing Draft Applications
- Sign Pending Agreement

Status and Management

Welcome to Provider Enrollment Status and Management
 Please choose from the options below to manage your enrollment status.

SUBMITTED APPLICATIONS

Below is the status of applications you have submitted.
 If status is Payment Pending, we have received initial confirmation from Paypoint that your payment was confirmed; it may take up to 48 hours to verify the payment. If status is Pay Now, your NC Application Fee payment was not made or failed; click Pay Now to make payment.
 If status of the application is in Payment Pending, Returned, or In Review, you can upload supporting documentation by clicking the Upload Documents hyperlink.

+ RECORD RESULTS

RE-ENROLL

NO DATA FOUND

MANAGE CHANGE REQUEST

If you are a behavioral health provider contracted with a Local Management Entity/Managed Care Organization (LME/MCO) and you update your data in a NCTracks Manage Change Request application, please ensure your LME/MCO has the same updated data on file.
 The following provider accounts associated with your NCID are active. Please select the account with which you would like to submit a Manage Change Request, then click 'Update'.

+ RECORD RESULTS

Update

RE-VERIFICATION

NO DATA FOUND

MAINTAIN ELIGIBILITY

NO DATA FOUND

FINGERPRINTING REQUIRED

NO DATA FOUND

Exhibit 5. Status and Management Page

Status and Management Page Sections

The **Status and Management** page contains the following sections:

- **Submitted Applications:** Displays a list of applications that have been previously submitted.
- **Saved Applications:** Displays a list of applications that have been started but not yet submitted. Please remember that your application must be submitted to the State within 90 days of the date it was created. If not completed within 90 days, the incomplete application will be deleted. It will also be deleted if Fiscal Agent Operations (CSRA) makes a change to the provider record. If this occurs, you will receive a notification message when attempting to resume the application.
- **Re-enroll:** Lists provider accounts associated with the user's NCID that have been terminated. The user can select an account to re-enroll, then select **Submit**.
- **Manage Change Request:** Allows the user to submit a Manage Change Request application for an active provider enrollment account.
- **Re-verification:** Allows the user to submit a required Re-verification application for a provider enrollment account.
- **Maintain Eligibility:** Allows the user to submit a required Maintain Eligibility application for a provider enrollment account.

- **Enrollment Specialist Applications:** Lists applications (Enrollment, Re-enrollment, Manage Change Request, Re-verification, and Maintain Eligibility) that the Office Administrator (OA) assigned to an Enrollment Specialist to complete.
 - **Fingerprinting Required:** Allows the user to submit a Fingerprinting Required application for a provider enrollment account.
2. To begin a new Manage Change Request, under the **Manage Change Request** section, select the radio button next to the NPI/Atypical ID to be changed and then select the **Update** button.

Note: If the **Manage Change Request** section reads 'No Data to Display', it is possible that a Manage Change Request has already been created and/or submitted, but not yet approved. Check the **Submitted Applications** and **Saved Applications** sections for a Manage Change Request/Enrollment that is already in process.

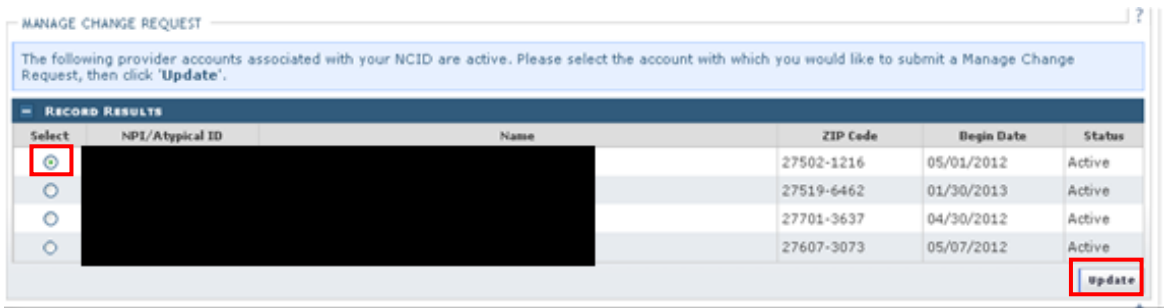


Exhibit 6. Manage Change Request Section

3. The **Requested Manage Change Request Type** page displays. Select the **MANAGE CHANGE REQUEST: Complete multiple changes or review your complete provider record** option and then select the **Next** button.

Note: You will see different options on this page depending on your security role and/or provider type.

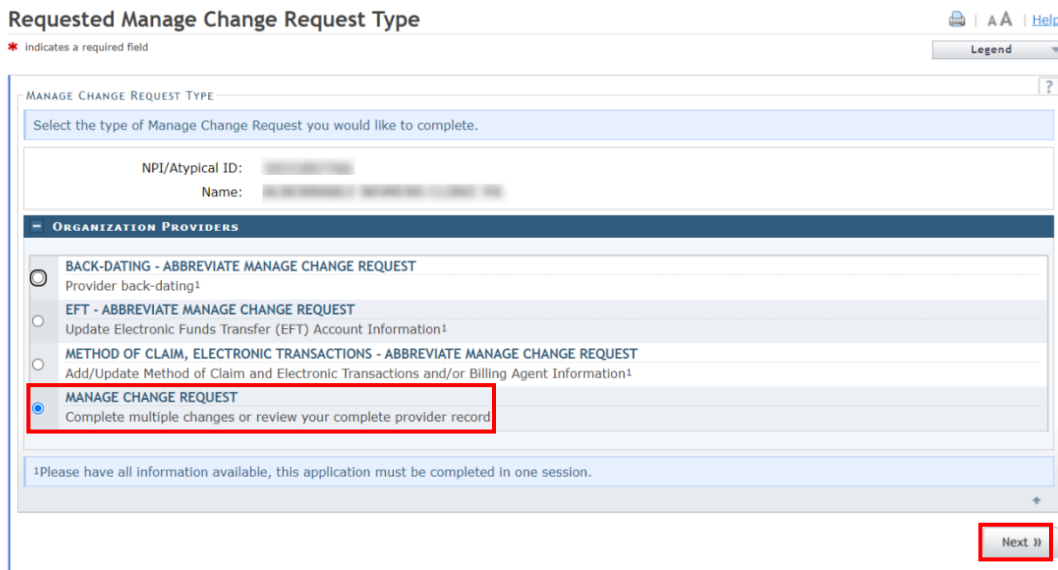


Exhibit 7. Requested Manage Change Request Type Page

Navigating Within the Manage Change Request Application

1. Depending on your enrollment, either the **Organization Basic Information** or **Individual Basic Information** page displays. Scroll down to the bottom of this page and select the **Next** button to continue to the **Terms and Conditions** page.

Important: Do NOT select the hyperlinks on the left side of the page to advance to the next page, as each page must be accessed/reviewed before the Manage Change Request can be submitted. Instead, select the **Next** button in the bottom right corner of each page to navigate through the pages.

Exhibit 8. Organization Basic Information Page – Select Next to Navigate

Note: Selecting the **Save Draft** button will only save your progress and will not submit the Manage Change Request for processing.

2. On the **Terms and Conditions** page, to attest and accept Medicaid Terms and Agreements, select the **Attestation** checkbox. Select the **Next** button.

Exhibit 9. Attestation Statement

3. Continue to select the **Next** button through the Manage Change Request application until you reach the **Taxonomy Classification** page.

Viewing Taxonomy Details

1. The **Taxonomy Classification** page displays active, suspended, and terminated taxonomy codes as well as a section to add new taxonomy codes. The taxonomy codes are listed on the dark blue bars, as shown in the following exhibit. To view the details of a taxonomy code, select the + (plus) sign to expand the view.

Note: Applicants must meet all program requirements and qualifications for which they are seeking enrollment before they can be enrolled as DHHS providers. Specific qualifications for each provider type are listed in the Provider Permission Matrix on the NCTracks [Provider Enrollment page](#) under the topic **Quick Links**.

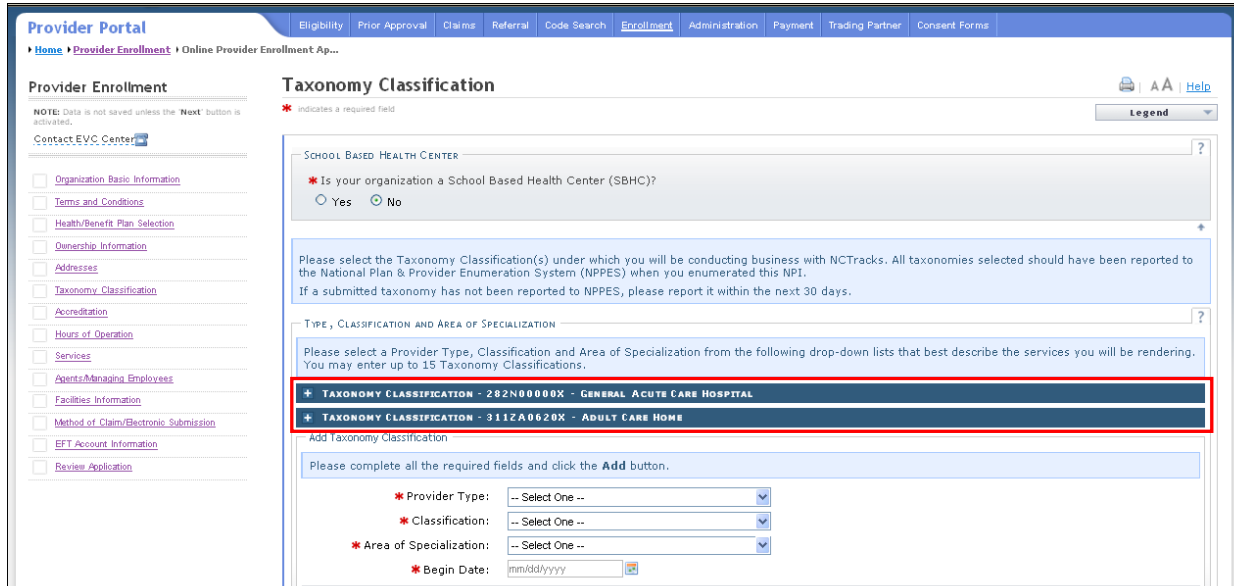


Exhibit 10. Expand Taxonomy Sections

2. The Taxonomy Classification details view displays the Provider Type (Level 1), Classification (Level 2), and Area of Specialization (Level 3), along with the Status and Begin Date. The **Edit** button is used to end-date existing taxonomies.

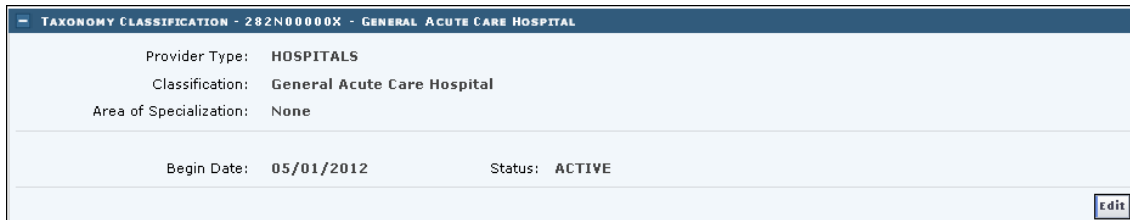


Exhibit 11. Taxonomy Classification

Adding a New Taxonomy Code

1. To add a new taxonomy, under the **Add Taxonomy Classification** section, complete the following steps:
 - a. Select the **Provider Type**.
 - b. Select the **Classification** (if available).
 - c. Select the **Area of Specialization** (if available).

- d. Enter or select the **Begin Date**.
- e. Select the **Add** button.

Exhibit 12. Taxonomy Classification

The **Provider Type** selection determines the available options for **Classification**. The **Classification** selection determines the available options for **Area of Specialization**. In the following example, no options are available under **Area of Specialization** because the **Provider Type** or **Classification** has not been selected.

Exhibit 13. Taxonomy Menu Selection Options

Group providers will select a **Provider Type** of Group, with a **Classification** of either Multi-Specialty or Single-Specialty. This taxonomy combination (as well as others) does not have an **Area of Specialization** option. See the following example.

Exhibit 14. Taxonomy Combinations

- 2. The new taxonomy will be added at the bottom of the list with **NEWLY ADDED** indicated next to the header.

+ TAXONOMY CLASSIFICATION - 282N00000X - GENERAL ACUTE CARE HOSPITAL
+ TAXONOMY CLASSIFICATION - 311ZA0620X - ADULT CARE HOME
+ TAXONOMY CLASSIFICATION - 193200000X - MULTI-SPECIALTY --- NEWLY ADDED
Add Taxonomy Classification

Exhibit 15. Newly Added Taxonomy

- Continue to select the **Next** button through the Manage Change Request application until you reach the **Accreditation** page.

Please be sure to complete all required fields with valid content.

Next »

Exhibit 16. Select Next to Continue

Adding Accreditation, Licensing, or Certification Information

- The **Accreditation** page contains three sections: **Accreditations**, **Certifications**, and **Licenses**. Not all sections are required. To determine the required sections, scroll down and identify the light blue sections that display your taxonomies.

Accreditation

* indicates a required field

Legend

ACCREDITATIONS

Add Accreditation

Select an accreditation type from the drop down list and provide the accreditation number.

Accreditation Type: -- Select One --

Accreditation #:

Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Add Clear

CERTIFICATIONS

Taxonomy **364SP0810X - Psychiatric/Mental Health, Child & Family** requires the following Certification Type:

- Advanced Practice Psychiatric Clinical Nurse Specialist (CNS) By American Psychiatric Nurses Association (APNA) , OR
- Advanced Practice Psychiatric Clinical Nurse Specialist (CNS) By American Nurse Credentialing Center (ANCC)

Add Certification

In addition to certifications required for a taxonomy code, enter all additional board certifications. Select a certification type from the drop down list and provide the certifying entity and certification number.

Certification Type: -- Select One --

Certifying Entity: -- Select One --

State: NORTH CAROLINA

Certification #:

Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Add Clear

LICENSES

Taxonomy **1041C0700X - Clinical** requires the following License Type:

- LICENSED CLINICAL SOCIAL WORKER (LCSW) By STATE SOCIAL WORK CERTIFICATION & LICENSURE BOARD

Taxonomy **364SP0810X - Psychiatric/Mental Health, Child & Family** requires the following License Type:

- CLINICAL NURSE SPECIALIST By STATE BOARD OF NURSING

Add License

Select a license type from the drop down list and provide the license number.

License Agency: -- Select One --

License Type: -- Select One --

State: NORTH CAROLINA

License #:

Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Add Clear

Previous

Please be sure to complete all required fields with valid content.

Next

Save Draft Delete Draft

Exhibit 17. Accreditation Page

Note: If an invalid taxonomy is listed on this page and requires an accreditation that the provider does not have, the invalid taxonomy must be end-dated.

The licenses and certifications listed directly below the taxonomy in the light blue section are required.

In the following example, this provider has one taxonomy listed under **Certifications** that requires one of the two certifications.

Accreditation

* indicates a required field

Legend

ACCREDITATIONS

Add Accreditation

Select an accreditation type from the drop down list and provide the accreditation number.

Accreditation Type: -- Select One --

Accreditation #:

Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Add Clear

CERTIFICATIONS

Taxonomy **364SP0810X - Psychiatric/Mental Health, Child & Family** requires the following Certification Type:

- Advanced Practice Psychiatric Clinical Nurse Specialist (CNS) By American Psychiatric Nurses Association (APNA) , OR
- Advanced Practice Psychiatric Clinical Nurse Specialist (CNS) By American Nurse Credentialing Center (ANCC)

Add Certification

In addition to certifications required for a taxonomy code, enter all additional board certifications.

Select a certification type from the drop down list and provide the certifying entity and certification number.

Certification Type: -- Select One --

Certifying Entity: -- Select One --

State: NORTH CAROLIA

Certification #:

Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Add Clear

Exhibit 18. Accreditation Example 1

In the following example, this provider has two different taxonomies, which require two different licenses.

LICENSES

Taxonomy **1041C0700X - Clinical** requires the following License Type:

- LICENSED CLINICAL SOCIAL WORKER (LCSW) By STATE SOCIAL WORK CERTIFICATION & LICENSURE BOARD

Taxonomy **364SP0810X - Psychiatric/Mental Health, Child & Family** requires the following License Type:

- CLINICAL NURSE SPECIALIST By STATE BOARD OF NURSING

Add License

Select a license type from the drop down list and provide the license number.

License Agency: -- Select One --

License Type: -- Select One --

State: NORTH CAROLIA

License #:

Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

Add Clear

Previous

Please be sure to complete all required fields with valid content.

Next

Save Draft Delete Draft

Exhibit 19. Accreditation Example 2

2. To add a certification, accreditation, or license, complete the following steps. (This example is for a certification, but the steps are similar for accreditations and licenses.)
 - a. Select the **License Agency/Certifying Entity**.
 - b. Select the **License Type/Certification Type/Accreditation Type**.
 - c. Select the **State**.
 - d. Enter the **License/Accreditation/Certification number**.
 - e. Enter or select the **Effective Date**.
 - f. Enter or select the **Expiration Date**.
 - g. Select the **Save** button.

Exhibit 20. Add Certifications, Accreditations, or Licenses

3. To update an existing certification, accreditation, or license, complete the following steps. (This example is for a certification, but the steps are similar for accreditations and licenses.)
 - a. Expand the existing certification, accreditation, or license by selecting the plus sign in the blue bar. This will show you the details of what is on file in NCTracks.
 - b. Select the **Edit** button.

Exhibit 21. Accreditation

- c. Update the **License/Accreditation/Certification number** if applicable.
- d. Update the **Effective Date** if applicable by entering or selecting the date.

- e. Update the **Expiration Date** if applicable by entering or selecting the date.
- f. Select the **Save** button.

Note: When adding or updating accreditations to more than one service location, remember to select the **Save Location** button at the bottom of the page.

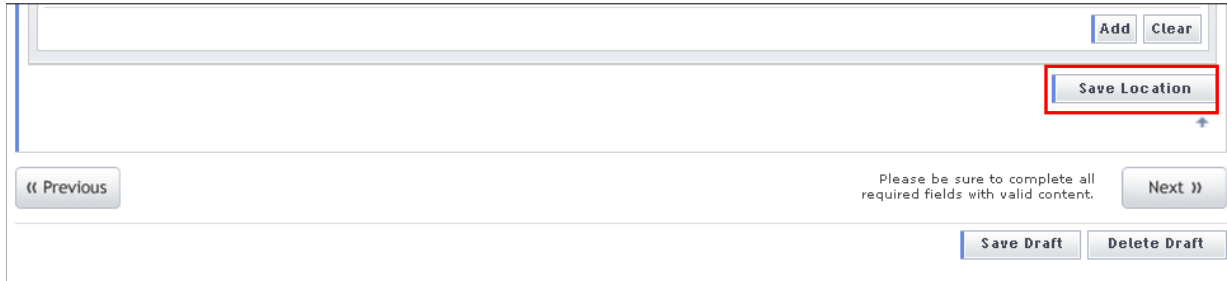


Exhibit 22. Save Location

- 4. As long as one of the required licenses and accreditations for each taxonomy has been added, you may select the **Next** button at the bottom of the page to proceed to the **Review Application** page.

Clearing Optional Accreditations

Although some accreditation sections may NOT be required, if you inadvertently select the **Accreditation Type** from the drop-down menu, the entire section becomes required. Select the **Clear** button to clear all fields.

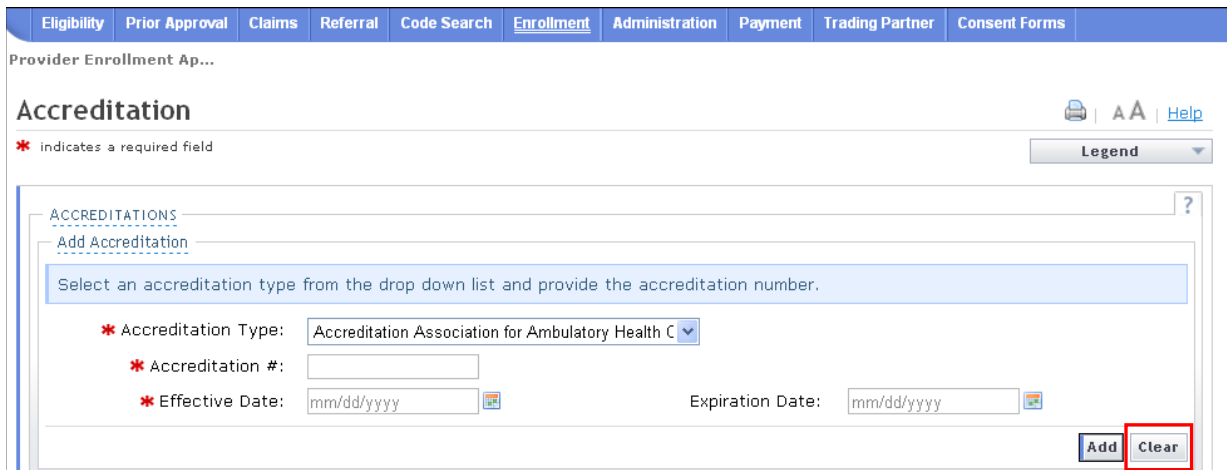


Exhibit 23. Clearing Optional Accreditations

REVIEWING, SIGNING, AND SUBMITTING THE MANAGE CHANGE REQUEST

- 1. On the left side of the **Review Application** page, verify that all application pages (hyperlinks) have a green check mark. In addition, verify the contact email address listed on the page. This can be updated on the **Basic Information** page.
- 2. To review the application in Adobe PDF format, select the **Review Application** button. If you have successfully completed all required information for your provider enrollment application and are satisfied the information is complete and accurate, select the **Next** button to proceed to the **Attachments/Submit Electronic Application** page.

Exhibit 24. Review Application Page

3. The **Sign and Submit Electronic Application** page displays. Enter the NCID and password as well as the PIN, and select the **Submit Now** button.

Exhibit 25. Sign and Submit Electronic Application Page

Tips for Navigating the Manage Change Request Application

All pages must be reviewed prior to continuing. If you receive the following error, select the application pages that do not have check marks next to the hyperlinks and select **Next** through those pages.

Error Summary

Please fix the following errors before you proceed.

- Please complete all pages in this application before proceeding.

Exhibit 26. Error – Complete All Pages in the Application

Provider Portal | Eligibility | Prior Approval | Claims | Referral | Code Search | **Enrollment** | Administration | Payment | Trading Partner | Consent Forms

Home > Provider Enrollment > Online Provider Enrollment Ap...

Provider Enrollment

NOTE: Data is not saved unless the 'Next' button is activated.

Contact EVC Center

- Organization Basic Information
- Terms and Conditions
- Health/Benefit Plan Selection
- Ownership Information
- Addresses
- Taxonomy Classification
- Accreditation
- CCNC/CA
- Physician Extender Participation
- Hours of Operation
- Services
- Agents/Managing Employees
- Facilities Information
- Method of Claim/Electronic Submission
- EFT Account Information
- Review Application

Review Application

* indicates a required field

Legend

ELECTRONIC SIGNATURE - EMAIL CONFIRMATION

- Please confirm that the email address below is correct. If you don't already have one, an Electronic Signature PIN will be sent to this address upon submitting the next page. You will need access to this email address to retrieve/reset your PIN and complete this Online Application.
- If the email below is incorrect, you may now navigate back to the [Basic Information page](#) to update it. (Remember to click Next on the [Basic Information page](#) to store your changes.)

Contact Email: CAMERONSMITHTRAIN@GMAIL.COM

REVIEW APPLICATION

To review your application in Adobe PDF format, click 'Review Application' below. If you have successfully completed all required information for your provider enrollment application and are satisfied the information is complete and accurate, you may proceed to the Attachments/Submit Electronic Application page by clicking 'Next'.

Review Application

Previous Next

Please be sure to complete all required fields with valid content.

Save Draft Cancel Enrollment

PDF documents on this page require the free [Adobe Reader](#) to view and print.

Exhibit 27. Review Application – Incomplete Pages

OTHER TAXONOMY RESOURCES

Taxonomy codes are a national code set managed by the National Uniform Claim Committee (NUCC). Many of the new taxonomy codes are different from the previous codes. Providers may visit the [NUCC website](#) to view NUCC taxonomy code options.