# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIST OF FIGURES</td>
<td>3</td>
</tr>
<tr>
<td>1 Definitions, Abbreviations, &amp; Acronyms</td>
<td>4</td>
</tr>
<tr>
<td>2 Introduction</td>
<td>5</td>
</tr>
<tr>
<td>3 PEDI Administration</td>
<td>6</td>
</tr>
<tr>
<td>4 Organization Management</td>
<td>8</td>
</tr>
<tr>
<td>4.1 Update Organization</td>
<td>8</td>
</tr>
<tr>
<td>5 Request to be an eSAR Trading Partner</td>
<td>9</td>
</tr>
<tr>
<td>5.1 Add Trading Partner</td>
<td>9</td>
</tr>
<tr>
<td>5.2 View Trading Partner Details</td>
<td>10</td>
</tr>
<tr>
<td>6 User Management</td>
<td>12</td>
</tr>
<tr>
<td>6.1 Add User</td>
<td>12</td>
</tr>
<tr>
<td>6.2 Filter the records (Find User)</td>
<td>13</td>
</tr>
<tr>
<td>6.3 Deactivate User</td>
<td>13</td>
</tr>
<tr>
<td>6.4 Reactivate Deactivated User</td>
<td>13</td>
</tr>
<tr>
<td>6.5 Reset Password</td>
<td>14</td>
</tr>
<tr>
<td>6.6 Reset Security Questions</td>
<td>14</td>
</tr>
<tr>
<td>7 Manage Providers/Special Care Centers or Plans</td>
<td>15</td>
</tr>
<tr>
<td>7.1 Providers/SCC</td>
<td>15</td>
</tr>
<tr>
<td>7.1.1 Add Provider NPI/SCC</td>
<td>15</td>
</tr>
<tr>
<td>7.1.2 Filter the records (Find Provider)</td>
<td>16</td>
</tr>
<tr>
<td>7.1.3 Inactive Provider</td>
<td>17</td>
</tr>
<tr>
<td>7.1.4 Reactivate an Inactive Provider</td>
<td>17</td>
</tr>
<tr>
<td>7.2 Plans</td>
<td>17</td>
</tr>
<tr>
<td>7.2.1 Add Plan</td>
<td>17</td>
</tr>
<tr>
<td>7.2.2 Filter the records (Find Plan)</td>
<td>18</td>
</tr>
<tr>
<td>7.2.3 Inactive Plan</td>
<td>19</td>
</tr>
<tr>
<td>7.2.4 Reactivate an Inactive Plan</td>
<td>19</td>
</tr>
</tbody>
</table>
LIST OF FIGURES

Figure 3-1, Admin Link .................................................................................................... 6
Figure 3-2, Organization Selection .................................................................................. 6
Figure 3-3, Organization Maintenance ............................................................................ 7
Figure 3-4, Organization Maintenance Sections ............................................................. 7
Figure 4-1, Organization Management ............................................................................ 8
Figure 5-1, Trading Partner Section .............................................................................. 9
Figure 5-2, Add Trading Partner Information ................................................................. 9
Figure 5-3, Add Trading Partner Contact Information .................................................... 10
Figure 5-4, View Trading Partner .................................................................................. 11
Figure 6-1, User Management Section ......................................................................... 12
Figure 6-2, Add User ..................................................................................................... 12
Figure 6-3, Filter the Records ....................................................................................... 13
Figure 6-4, Deactivate User .......................................................................................... 13
Figure 6-5, Reactivate User .......................................................................................... 14
Figure 7-1, Provider Section .......................................................................................... 15
Figure 7-2, Add Provider ............................................................................................... 15
Figure 7-3, Adding NPI Request for Approval ............................................................... 15
Figure 7-4, Pending Count NPI Request for Approval .................................................... 16
Figure 7-5, Filter the Records ....................................................................................... 16
Figure 7-6, Deactivate Provider ..................................................................................... 17
Figure 7-7, Reactivate an Inactive Provider .................................................................. 17
Figure 7-8, Plan Section ................................................................................................. 17
Figure 7-9, Add Plan ..................................................................................................... 18
Figure 7-10, Plan Status ................................................................................................. 18
Figure 7-11, Filter the Records ..................................................................................... 18
Figure 7-12, Deactivate Plan ........................................................................................ 19
Figure 7-13, Reactivate an Inactive Plan ...................................................................... 19
# 1 Definitions, Abbreviations, & Acronyms

The following terms, abbreviations, and acronyms may be used in this document:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCS</td>
<td>California Children’s Services</td>
</tr>
<tr>
<td>CMS</td>
<td>Children’s Medical Services</td>
</tr>
<tr>
<td>CMS Net</td>
<td>CMS Case Management System</td>
</tr>
<tr>
<td>CMS Net Help Desk</td>
<td>CMS Net and PEDI Technical Help</td>
</tr>
<tr>
<td>DHCS</td>
<td>Department of Health Care Services</td>
</tr>
<tr>
<td>MCP</td>
<td>Managed Care Plan</td>
</tr>
<tr>
<td>MEDS</td>
<td>Medi-Cal Eligibility Data System</td>
</tr>
<tr>
<td>NPI</td>
<td>National Provider Identifier</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format</td>
</tr>
<tr>
<td>PEDI</td>
<td>Provider Electronic Data Exchange</td>
</tr>
<tr>
<td>SAR</td>
<td>Service Authorization Request</td>
</tr>
<tr>
<td>SCC</td>
<td>Special Care Center</td>
</tr>
</tbody>
</table>
INTRODUCTION

This guide is for Provider Electronic Data Interchange (PEDI) liaisons only.

After reviewing this guide, you will be able to:

- Update your organization information
- Request to be an eSAR and/or SAR file Trading Partner
- Manage user accounts
- Manage providers in your organization

CMS Net Help Desk approval is required for the following updates:

- Approve eSAR and/or SAR file Trading Partners
- Approve liaisons
- Approve providers in your organization
- Approve plans in your organization
Liaisons have an Admin link at the top of the PEDI screen.

![Admin Link](image)

**Figure 3-1, Admin Link**

Liaisons for two or more organizations will see an organization selection screen when clicking the Admin button. You will get a list of all your organizations. Select the organization you want to edit/modify. The system will take you to the Organization Maintenance screen.

![Organization Selection](image)

**Figure 3-2, Organization Selection**

Liaisons for one organization will go directly to the Organization Maintenance screen after clicking the Admin button. This screen has sections to manage the administrative tasks for your PEDI organization.
Organization Maintenance has four sections:

- **Organization Management** – The primary PEDI organization contact.
- **Trading Partner** – Trading partners can create eSARs and transfer SAR files.
- **User Management** – Manage the users that have access to your organization.
- **Provider** – Manage the NPIs/SCCs/Plans in your organization.
## ORGANIZATION MANAGEMENT

### 4.1 Update Organization

Change the address of your main office. This information is for PEDI only and does not reflect on any SARs. Update this information when your primary address changes.

![Organization Management Form](image)

**Figure 4-1, Organization Management**
5 REQUEST TO BE AN eSAR TRADING PARTNER

Organizations with a trading partner account can create eSARs for any NPI in their organization. An organization only needs one trading partner account. You can request to become a trading partner if you do not already have one.

Managed Care Plans cannot be trading partners.

Click on the “+” to expand the Trading Partner section.

5.1 Add Trading Partner

Click the “Add Trading Partner” button to request the ability to create eSARs.
Admin User Guide

The first section asks for information on your organization. PEDI automatically fills in the Trading Partner Name and address from Organization Management.

1. Select your practice type, Identification Code Qualifier (most organizations will choose “National Provider Identifier”, and Identification Code (most organizations will enter a NPI they are responsible for).

![Image of Primary Contact Information]

**Primary Contact Information**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Electronic mail

| Telephone | Ext | | |
|-----------|----|---|
|           |    |   |

**IT Contact Information**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Electronic mail

<table>
<thead>
<tr>
<th>Telephone</th>
<th>Ext</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save

2. The Primary Contact and IT Contact information are used as points of contact for eSAR-related issues. Fill in the contact information.

3. Save the request. The request will be marked as pending until the CMS Net Help Desk takes action on your request.

5.2 View Trading Partner Details

Click the “greater than” symbol to view the trading partner details.
### Admin User Guide

**Request to be an eSAR Trading Partner**

**3/12/2020**

**Figure 5-4, View Trading Partner**

<table>
<thead>
<tr>
<th>Trading Partner ID</th>
<th>Name and Address</th>
<th>Primary Contact</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>STREET ORGANIZATION</td>
<td>Tester,Another</td>
<td>Pending</td>
</tr>
</tbody>
</table>

- **Individual**
- **Name**: STREET ORGANIZATION
- **Practice Type**: Facility
- **Identification Code Qualifier**: 1234567890
- **Identification Code**: 1000011122
- **Street Nr**: 21
- **Street Name**: Fair Oaks
- **Street Type**: Boulevard
- **Unit**: 22
- **City**: Fair Oaks
- **State**: CA
- **Zip**: 95638

---

---
6 USER MANAGEMENT

The user management header lists the number of total users and active users in your organization.

Click the “+” icon on User Management to expand the User Management section.

![Figure 6-1, User Management Section](image)

Click the “greater than” symbol to view user details.

6.1 Add User

Click the “Add User” button to add a user to your organization.

![Figure 6-2, Add User](image)

1. Enter the user’s information.
2. If the user is already in another organization, the system will validate based on the electronic mail field.
3. Click the check box (if visible) to allow the user to create eSARs for your organization.
4. Save the request. The user will receive an email with login instructions.
6.2 Filter the records (Find User)

You can filter the user records to find a specific user in the list. You can use the filter to search by name, role, status, or any of the other fields.

![Filter the records](image)

**Figure 6-3, Filter the Records**

6.3 Deactivate User

Liaisons can deactivate users that leave the organization.

Click the “greater than” symbol to view the user details.

![Deactivate User](image)

**Figure 6-4, Deactivate User**

1. Select the Deactivation Reason if known, and then click the Deactivate button.
2. Users with role of “User” will be deactivated. Users with role of “Liaison” will be set as Request Deactivation. The CMS Net Help Desk will finish the deactivation process.

6.4 Reactivate Deactivated User

Liaisons can reactivate users that return to the organization.

Click the “greater than” symbol to view the user details.
1. Click the Activate button to reactivate the user.

6.5 Reset Password

Liaisons can reset passwords. Click the lock at the end of the user list to reset the user’s password.

This icon will be grey (disabled) if you cannot reset the password.

6.6 Reset Security Questions

Liaisons can reset the user’s security questions. Click the question mark at the end of the user list to reset the user’s security question.

This icon will be grey (disabled) if you cannot reset the security questions.
7 MANAGE PROVIDERS/SPECIAL CARE CENTERS OR PLANS

7.1 Providers/SCC

Click on the “+” icon on Provider to expand the Provider section.

![Figure 7-1, Provider Section](image)

7.1.1 Add Provider NPI/SCC

1. Enter the Provider Number in the Search Provider Number field and hit enter.
2. System populates the provider onto the page when it’s a one to one result. However, when a provider’s NPI/SCC is associated with multiple provider types, search results displays all provider types/locations for user to view. Clicking on any of the selection will input all provider types found and associated with the NPI on the screen.
   If NPI has a legacy Medi-Cal number associated to it, the legacy number will also populate onto screen.
3. Once user selects the provider from the search result list, system populates it onto the screen as “Pending” status.

Note:
- Status- will be pending, as it requires approval from the State Administrator.
- A provider can be removed by clicking on the red “X” icon as long as it is in the Pending Status.

![Figure 7-3, Adding NPI Request for Approval](image)
Admin User Guide

Once Approved/Rejected by the State Administrator, the request liaison will receive an email from CMS Net Help Desk of the request status.

- If the Help desk approves the request, the status changes from Pending to Active.
- If the Help desk rejects the request, the provider status changes from Pending to Rejected.

The PEDI Liaison can view the pending NPI number count on the home page for all NPIs submitted for review and approval.

![Figure 7-4, Pending Count NPI Request for Approval]

7.1.2 Filter the records (Find Provider)

“Filter the records” is used to search for the Provider by the NPI/SCC Number or Name. This allows users to filter for the NPI/SCC that are already listed in the organization or to verify if it already exists in organization.

You can filter the user records to find a specific NPI/SCC in the list. You can use the filter to search by name, NPI/SCC Number, Type, or any of the other fields.

![Figure 7-5, Filter the Records]
7.1.3 Inactive Provider

If a provider leaves an organization, liaison can make that NPI inactive.

<table>
<thead>
<tr>
<th>NPI</th>
<th>Name</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tanaka, Richard MD</td>
<td>Physician</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Oksider, Albert MD</td>
<td>Physician</td>
<td>Inactive</td>
</tr>
<tr>
<td></td>
<td>Catan, Daniel MD</td>
<td>Physician</td>
<td>Active</td>
</tr>
</tbody>
</table>

Figure 7-6, Deactivate Provider

1. Select the provider that needs to be made ‘inactive’.
2. Click on the red “X” icon
3. Provider NPI status changes from “Active” to “Inactive”

7.1.4 Reactivate an Inactive Provider

If a provider leaves an organization and later returns, liaison can request for the reactivation by making that NPI status as ‘Pending’.

<table>
<thead>
<tr>
<th>NPI</th>
<th>Name</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Tanaka, Richard MD</td>
<td>Physician</td>
<td>Pending</td>
</tr>
<tr>
<td></td>
<td>Oksider, Albert MD</td>
<td>Physician</td>
<td>Pending</td>
</tr>
<tr>
<td></td>
<td>Catan, Daniel MD</td>
<td>Physician</td>
<td>Pending</td>
</tr>
</tbody>
</table>

Figure 7-7, Reactivate an Inactive Provider

1. Select the provider that needs reactivation to the organization.
2. Click on “check” icon.
3. Provider NPI status changes from “Inactive” to “Pending”

7.2 Plans

Click on the “+” icon on Plan to expand the Plan section on the Organization Management Page.

Figure 7-8, Plan Section

7.2.1 Add Plan

To add a new plan, enter the Plan Number in the Plan Number text box.
If the Plan exists in the CMS NET system, it will be displayed under the NPI/Plan List section. The status of the plan is set as pending, as it will need to be approved by the State Administrator.

<table>
<thead>
<tr>
<th>NPI / Plan Number</th>
<th>Name</th>
<th>Type</th>
<th>Paneled / Approved Status</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>052</td>
<td>Attuned Senior BuenaCare</td>
<td>Managed Care</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>404</td>
<td>Care 1st Health Plan Dental</td>
<td>Managed Care</td>
<td>Pending</td>
<td></td>
</tr>
</tbody>
</table>

The request to add new Plan is sent to State Administrator who determines if the request is to be approved or rejected.

The Liaison will receive an email from the CMS Net Help Desk about the status of the request. It will either be rejected or approved.

- Once approved, the plan’s status will change from Pending to Active.
- If rejected, the CMS Net Help Desk will provide a denial reason.

7.2.2 Filter the records (Find Plan)

Filter the records” is used to search for the Plan by the Plan Number or Name. This allows user to filter for the Plan that are already listed in the organization or to verify if it already exists in organization.

You can filter the user records to find a specific Plan in the list. You can use the filter to search by name, Plan Number, Type, or any of the other fields.
7.2.3 Inactive Plan

On the Plan section, select the plan to be inactivate and click on the red “x” icon status changes from “Active” to “Inactive”.

![Figure 7-12, Deactivate Plan](image)

1. Select the plan that needs to be made ‘inactive’.
2. Click on the red “X” icon.
3. Plan status changes from “Active” to “Inactive”

7.2.4 Reactivate an Inactive Plan

In order to reactivate an inactive plan, the liaison has to click on the “check” icon to change the status of the plan from “Inactive” to “Pending”

1. Select the provider that needs reactivation to the organization.
2. Click on “check” icon.
3. Provider NPI status changes from “Inactive” to “Pending”

The CMS Net Help Desk will contact the liaison of approval or rejection.

![Figure 7-13, Reactivate an Inactive Plan](image)