

Universal Credentialing

Process Guide for the Behavioral Health (BH) CRM

Contents

Process Contact Information	1
Getting Established & Starting the Credentialing Process.....	2
Create New Credentialing Profile	2
Staff Credentialing	2
Credentialing Contacts for Organizational/Practitioner Profiles	3
Complete and Submit Application (Provider Users)	3
Reviewing and Completing Application	4
Primary Source Verification	4
Subscription	4
Re-Credentialing	4
CVO Specific Information	5
Other Helpful Information	5
Chatter	5
Automated Emails.....	6
Reporting.....	6
Application Statuses.....	7
Subscription Statuses.....	7
Navigating to Credentialing Profiles & List Views.....	6
Credentialing Admins’ Lists.....	6
Universal Credentialing Provider Lists	6
Job Aids	7
Training Videos.....	8
PIHP/CMHSP Credentialing Admins.....	8
Organizational Providers, Staff Providers, and Individual Practitioners.....	9
Other Documents related to Universal Credentialing	9
Key Terms & Definitions.....	10

Process Contact Information

MDHHS-BH-CRM@michigan.gov – BH CRM team inbox. Utilize for technical issues, single sign-on errors, provider/account additions, contact changes, or anything related to the BH CRM system.

MDHHS-Universalcredentialing@michigan.gov – Universal Credentialing team inbox for process related questions or support. RCC changes also need to be coordinated through this inbox.

Getting Established & Starting the Credentialing Process

[Job Aid: IT System Administrators – Add New User to Contact List \(PIHP & CMHSP Staff Credentialing\)](#)

[Job Aid: IT System Administrators - Grant Existing Users Credentialing Admin Permission](#)

[Job Aid: BH CRM Partner Access](#)

[Job Aid: Navigating to and Viewing a Credentialing Profile](#)

- PIHP/CMHSPs are responsible with identifying Individual Practitioners or Organizational Providers accounts that need to be added into the system. PIHP/CMHSPs will utilize the **Provider Entity Templates** to submit any individual practitioners or organizational providers missing from the system to the [MDHHS BH CRM team](#). You will receive an email confirmation once the locations on the template have been added. Please follow the job aid for [How to Search for Providers](#) to utilize the universal search in the system or you can search as you create credentialing profiles using [Job Aid: Create New Credentialing Profile](#).
- For internal staff credentialing, PIHP/CMHSPs will work with their IT system administrators to set up their internal staff that needs to be credentialed in the system.

Create New Credentialing Profile

[Job Aid: Create New Credentialing Profile](#)

1. The PIHP/CMHSP user navigates to the “Credentialing Profile” section and selects “Create New Credentialing Profile”



2. PIHP/CMHSP selects type of profile:
 - a. Organization/Practitioner Credentialing Profile
 - b. PIHP/CMHSP Staff Credentialing Profile
 - i. If the PIHP/CMHSP is utilizing a CVO to complete the credentialing process, select the “CVO Credentialing Profile” checkbox.
3. PIHP/CMHSP searches for the provider entity account in the system and selects account.
 - a. If a profile does not exist for this provider, the PIHP/CMHSP will be able to confirm and create the new credentialing profile. At this point, the profile has been created and the user will move on to add credentialing contacts.
 - b. If a credentialing profile already exists in the system for this provider, a message will appear notifying the user and will not create a duplicate profile. If you utilize this provider, you will want to subscribe to the existing. If you believe you should be the RCC (the home location falls within your region), then you will need to coordinate with the current RCC and MDHHS-Universalcredentialing@michigan.gov to update. See job aid: [Re-Assign a Responsible Credentialing Coordinator](#).

Staff Credentialing

[Job Aid: IT System Administrators – Add New User to Contact List \(PIHP & CMHSP Staff Credentialing\)](#)

[Job Aid: Create a New PIHP or CMHSP Staff Credentialing Profile](#)

The CMHSP/PIHP user will select from the list of staff contacts in the system to create their staff credentialing profile. This list will include all staff contacts in the system, so there may be users that work on other processes in the BH CRM system and are not providers.

Credentialing Contacts for Organizational/Practitioner Profiles

[Job Aid: Editing Credentialing Contacts](#)

Once selecting the account, the PIHP/CMHSP will either add new user(s) or select an existing contact from the contact list to grant access to before continuing to the application. The contacts you grant access to will receive an email with directions on how to gain access to the system to complete their application.

Create Credentialing Profile

Please select the users from this Account that will need access to access to their Credentialing Profile. If the user doesn't currently exist in the list below, then create a new contact for that individual.

6 of 6 items - 1 item selected

<input type="checkbox"/>	Full Name	Email	Universal Credentialing Provider	Active
<input type="checkbox"/>	test tester	longj18+ucdeploy@michigan.gov.invalid	✓	
<input type="checkbox"/>	15984Test Contact	15984fake@fake.com.invalid	✓	
<input type="checkbox"/>	21217 Test	mcelroyd1+21217test@michigan.gov.invalid		
<input checked="" type="checkbox"/>	21216 Test	mcelroyd1+21216@michigan.gov.invalid		
<input type="checkbox"/>	Sarah Sparks	s.sparks@test.org.invalid	✓	✓
<input type="checkbox"/>	Jane Doe	janedoe@test.test.org.invalid	✓	✓

* Please Select An Option Below

Create a New User

Grant Access to Users Selected Above

Activate Users Selected Above

Remove Access For Selected Users

Continue to Credentialing Profile

Next

1. **Create new user** – enter name and email address, this grants them access to the profile and sends an email notification
 - a. New Users will receive an email notification and are to follow the [MiLogin Registration and Login to the CRM Instructions](#) job aid in requesting access to the system.
 - b. When adding contacts to credentialing profiles, please verify that the name and email you have is correct and will match their MiLogin information. When new users request access to the BH CRM system via MiLogin, their **MiLogin email must match what we have in the BH CRM**. If a user requests access using a different email than what you registered them under, then their access request will be denied.
2. **Grant Access** to Users Selected Above (for existing users) – once hitting next, it sends an email notification and gives access to the users selected.
3. **Activate Users** – this will help users who are inactive in the system be able to log in.
4. **Remove Access** – this allows for removing a user's access to the credentialing profile.

Complete and Submit Application (Provider Users)

[Job Aid: Editing a Credentialing Profile \(Organizational Provider\)](#)

[Job Aid: Editing a Credentialing Profile \(Individual Practitioner\)](#)

1. Credentialing provider user will log into the system and go under the "Credentialing Profile" section by selecting it from the top banner.

2. This will show a list of either “Recently Viewed” or “My Credentialing Profiles”.
3. Click into the Credentialing Profile Name
4. Click “Actions” and select “Edit Application”
5. **Complete all sections**, including uploading documentation, which will show on the “Documents” tab of the application.
6. When application is complete and ready to submit, click “Actions” and select “Submit”
7. This updates the application status to submitted.

Reviewing and Completing Application

[Job Aid: Submitted Credentialing Profile - Complete Application](#)

[Job Aid: Submitted Credentialing Profile - Request Revisions](#)

RCC must review the application and verify all information is valid, before selecting the Actions button to either “request revisions” or “complete application”. There is the option to edit the universal credentialing contacts if necessary.

1. **Request Revisions** – RCC must provide a comment on what revisions should be made and an email will be sent to user to update their application. Status = Pending Provider Edits.
2. **Complete Application** – provide consent and status changes to complete.

Primary Source Verification

[Job Aid: Creating a New Primary Source Verification](#)

[Job Aid: Navigating to and Viewing a Primary Source Verification](#)

1. Once credentialing profile is in “Complete” status, the RCC can create the PSV by clicking “Actions” and selecting “Create Primary Source Verification”
2. They then select the Accrediting Organization, and documents are required but can be uploaded at a later time.
3. Once documentation is uploaded, the RCC can click “Actions” on the PSV and select “Complete PSV”.
 - a. Other CMHSPs/PIHPs can then go to the PSV and click on actions to “subscribe”.

Subscription

[Job Aid: Navigating to and Viewing a Subscription](#)

[Job Aid: Creating or Completing a New Subscription](#)

- Once the PSV is in “Complete” status, a subscription is automatically created for the RCC to complete. Once the RCC finalizes the subscription (approved/denied), the decision and expiration dates are generated, a decision letter is generated and emailed, and the process is then fully completed.
- Any CMHSPs/PIHP can subscribe to a primary source verification (PSV) that is in “complete” status on credentialing profiles for providers they also contract with.
- When creating a subscription for a provider that you previously credentialed outside of the system, utilize the ‘Previously Credentialed?’ checkbox and ‘Prior Credentialing Date’ field when you are completing the Subscription. Once the Subscription is completed, you cannot edit these fields.
- All subscriptions that are approved or denied will send an email with a decision letter to the provider.

Re-Credentialing

The Universal Re-Credentialing process begins with the CRM sending a notification to the CMHSP/PIHP and Provider/Organization 90 days prior to recredentialing. The CRM checks if the Provider user login or Organization’s login is active in the system. After the login is activated in the system, the CRM sends the Provider/Organization the link to the Universal Credentialing application. When the Provider/Organization receives the link to the Universal Credentialing application, the Provider/Organization should proceed with completing the Universal Credentialing application by

entering all the necessary information in the required fields and uploading/attaching documents. The Provider can move forward with finalizing and submitting the credentialing application to the CMHSP/PIHP.

The CMHSP/PIHP receives the complete Universal Credentialing application from the Provider/Organization. The CMHSP/PIHP decides if the Universal Credentialing is complete, and if application is not complete, the CMHSP/PIHP will send a request to the Provider/Organization for additional information. The Provider/Organization will receive the request and complete and returns the additional information to the CMHSP/PIHP. The CMHSP/PIHP will proceed with reviewing the application. Once the application is reviewed, the CMHSP/PIHP will proceed with the primary source verification and enter the primary source verified information. If the Provider/Organization was not privileged, the CMHSP/PIHP will be able to enter the denial information and send the denial letter. When the Provider receives the denial letter, the Provider/Organization can decide to appeal the decision and the CMHSP/PIHP can enter the Appeals decision. Once the Provider/Organization is privileged, the CMHSP/PIHP can enter approval information then send the approval letter to the Provider/Organization.

CVO Specific Information

[Job Aid: Create New Credentialing Profile \(CVO\)](#)

[Job Aid: Create a New PIHP or CMHSP Staff Credentialing Profile \(CVO\)](#)

[Job Aid: Finalizing a Credentialing Profile \(CVO\)](#)

1. When the CVO Requestor (PIHP) is creating the credentialing profile, they need to make sure that they select “CVO Credentialing Profile”.
2. The PIHP is responsible for determining the process outside of the BH CRM with their CVO and communicating the CRM Credentialing Profile ID # to them.
3. The CVO system will handle the steps following up until they conduct and send PSV and credentialing profile results to the CRM.
4. When the CVO sends the information back to the CRM, a new PSV record is created off the provider’s credentialing profile and the profile details are populated.
5. The RCC from the CVO Requestor will receive a notification of the submitted credentialing profile and the PSV. A subscription record is created on the PSV for the CVO Requestor. The RCC will upload a Quality checklist that documents sign off approval, completing the subscription.
6. The system generates an approval letter, but the PIHP is responsible for delivering the letter to the provider.

Other Helpful Information

Chatter

Any partner user, whether it be the PIHP/CMHSP UC admin or the provider contact, can utilize Chatter on a credentialing profile to communicate with each other. Whoever has access to the credentialing profile will be able to see the chatter messages. The provider or PIHP/CMHSP users can tag other users by typing @name of who they want to notify of the message. By tagging a user, it will send a notification and an email to that user.

Automated Emails

1. **New Contact/New Credentialing Profile Email:** When the RCC adds users to a new or existing credentialing profile or grants a user access, an automated email will be sent to the email address of that contact letting them know there is a credentialing profile for them to fill out with instructions on how to gain access to the system.
2. **Credentialing Profile Submitted:** when a credentialing profile has been submitted, the RCC account users that have UC Admin permissions will receive an email notifying them of the submitted profile.
3. **Approval or Denial:** when a subscription has been approved/denied, the provider and the CMHSP/PIHP admins will receive an email with the decision letter.
4. **Expired Documentation or Provider edits needed:** providers will receive notification emails when the RCC requests revisions or when documentation has expired on their credentialing profile.
5. **Profile approaching expiration date:** when a credentialing profile is nearing expiration and a recredentialing profile is opened in draft, the providers and RCC users will receive email notifications to complete recredentialing prior to expiration.

Navigating to Credentialing Profiles & List Views

All Universal Credentialing users will navigate to “Credentialing Profile” to access the appropriate profile(s) via list views that are dependent on their permission level. Users with both permissions will be able to see all lists. Users can search these lists for providers to find existing credentialing profiles. See below for specifics.

Credentialing Admins’ Lists

All Credentialing Profiles – this includes all profiles in all statuses

All Completed Credentialing Profiles – this includes all profiles in the status of “Complete”

All Draft Credentialing Profiles – this includes all profiles in the status of “Draft”

All Submitted Credentialing Profiles - this includes all profiles in the status of “Submitted”

My Responsible Credentialing Profiles – this includes all profiles that a PIHP/CMHSP is the Responsible Credentialing Coordinator. This list will be most helpful to Credentialing Admins for processing their own profiles.

Staff Credentialing Profiles – this will include all staff credentialing that falls under either a CMHSP or PIHP. For PIHP users, this will include all of their CMHSP’s staff credentialing records.

Recently Viewed – a list of profiles that user has recently viewed.

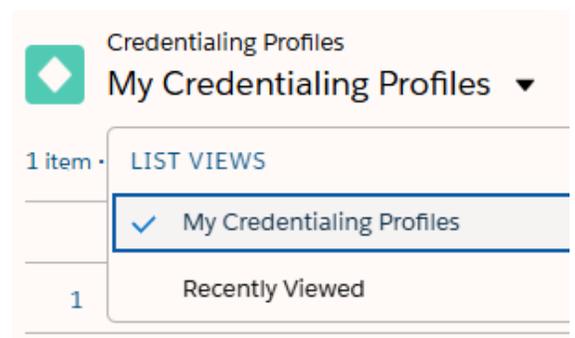
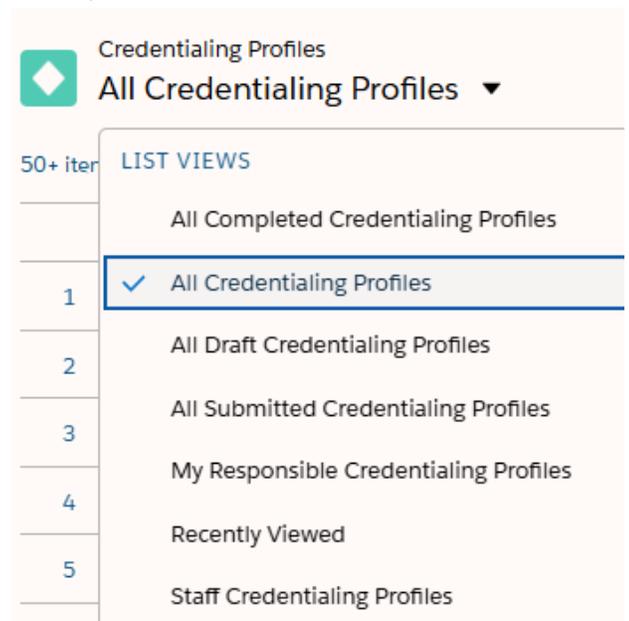
Universal Credentialing Provider Lists

My Credentialing Profiles – this will show the UC provider user any profiles they are responsible to complete, whether it be staff credentialing, organizational or practitioner.

Recently Viewed – a list of profiles that user has recently viewed.

Reporting

By navigating to “Reports”, you can find a “Universal Credentialing” folder with reports you can export from the system.



Application Statuses

1. Draft – Credentialing Profile created and ready for application to be filled out by Practitioner/Provider
2. Submitted - provider/practitioner has submitted application
3. Revisions Requested – PIHP/CMHSP requested of provider/practitioner
4. Complete – PIHP/CMHSP has reviewed the application and accepted/PSV also completed
5. Expired Documentation – one or more uploaded documents have expired
6. Expired – Credentialing Profile is locked, contact MDHHS-BH-CRM@michigan.gov
7. Pending Provider Edits – waiting for Provider/practitioner to make edits
8. Edits Pending Approval – waiting for RCC to view/approve Provider/practitioner edits

Subscription Statuses

1. In Progress – RCC has not gone in to complete the subscription
2. Complete – PIHP/CMHSP has uploaded everything required, marked as completed
3. Approved – Actions Tab (approve or deny provider/practitioner) letter is then generated and emailed out

Job Aids

You can navigate to the job aids listed below by going to 'Files' > 'Libraries' > 'Job Aids – Partners' > Universal Credentialing.

Category	Job Aid Name	Purpose	Audience
General	Navigating to and Viewing a Credentialing Profile	Instructs users on how to locate and open a Credentialing Profile	PIHPs, CMHSPs, & Practitioners
General	Create New Credentialing Profile	Instructs users on how to create a new Credentialing Profile	PIHP/CMHSP Admin
General	Editing Credentialing Contacts	Instructs users on how to create new users, grant access to existing users, activate users or remove user access.	PIHP/CMHSP Admin
General	IT System Administrators - Grant Existing Users Credentialing Admin Permission	Guides IT System Administrators on how to add the Credentialing Admin Permission to existing user profiles. This permission set is needed to access Universal Credentialing	PIHP & CMHSP IT System Administrators
PSV	Creating a New Primary Source Verification	How to create a new Primary Source Verification for both Organizational Providers & Individual Practitioners	PIHP/CMHSP Admin
PSV	Navigating to and Viewing a Primary Source Verification	How to navigate to and view a Primary Source Verification	PIHP/CMHSP Admin
Subscription	Navigating to and Viewing a Subscription	Instructs users on how to locate and open a Subscription	PIHP/CMHSP Admin
Subscription	Creating or Completing a New Subscription	How to create a new Subscription on a Primary Source Verification	PIHP/CMHSP Admin
Complete Application	Submitted Credentialing Profile - Complete Application	How to complete the application for a submitted credentialing profile	PIHP/CMHSP Admin
Request Revisions	Submitted Credentialing Profile - Request Revisions	How to request revisions for a submitted credentialing profile	PIHP/CMHSP Admin

Expired Documentation	Expired Documentation	How to remediate expired documentation on a Credentialing Profile	PIHP/CMHSP Admin
Open Profile for Edits	Expired Documentation - Open Credentialing Profile for Provider Edits	How to open a provider profile for edits when documentation is expired	PIHP/CMHSP Admin
General	Completing Requested Revisions	How to complete requested revisions	Practitioners
RCC Assignment	Re-Assign a Responsible Credentialing Coordinator	Explains what actions need to be taken by the PIHP/CMHSP to have a Responsible Credentialing Coordinator (RCC) re-assigned	PIHP/CMHSP Admin
Organizational Providers	Editing a Credentialing Profile (Organizational Provider)	How to edit an Organizational Provider credentialing profile	Practitioners (Organizational Providers)
Organizational Providers	Editing a Credentialing Profile - Credentialing Contacts (Organizational Provider)	How to edit Credentialing Contacts on a profile	PIHP/CMHSP Admin
Service Locations	Service Locations (Organizational Provider)	How to add Service Locations	PIHP/CMHSP Admin
Individual Practitioners	Editing a Credentialing Profile (Individual Practitioner)	How to edit an Individual Practitioner credentialing profile	Practitioners (Individual Practitioners)
Individual Practitioners	Requesting Revisions	How to request revisions for a submitted credentialing profile	PIHP/CMHSP Admin
CVO	Create New Credentialing Profile (CVO)	Instructs users on how to create a new Credentialing Profile for Organizational Providers & Individual Practitioners	PIHP/CMHSP Admin
CVO	Create a New PIHP or CMHSP Staff Credentialing Profile (CVO)	Instructs users on how to create a new Staff Credentialing Profile	PIHP/CMHSP Admin
CVO	Finalizing a Credentialing Profile (CVO)	How to complete a CVO credentialing profile	PIHP/CMHSP Admin
Staff Credentialing	Create a New PIHP or CMHSP Staff Credentialing Profile	How to create a PIHP/CMHSP Staff Credentialing Profile	PIHP/CMHSP Admin
Staff Credentialing	Editing a Staff Credentialing Profile	Instructs PIHP & CMHSP staff who are being credentialed how to fill out their credentialing application	PIHP & CMHSP Credentialed Staff

Training Videos

PIHP/CMHSP Credentialing Admins

Subject	Content	Video Link
General System Navigation	Navigating to Job Aids	https://youtu.be/JFGwZkb0K0s
	Navigating to a Credentialing Profile	https://youtu.be/CmAW5VUpcAA
	Navigating to and Viewing a Primary Source Verification	https://youtu.be/WS0K2W44e4w
	Navigating to and Viewing a Subscription	https://youtu.be/n-NU9M1IZBI
	Submitting a Provider Entity Form	https://youtu.be/HCJ5aav_-Bc

Creating a Staff Credentialing Profile	Creating a Staff Credentialing Profile	https://youtu.be/5rrH1ajNLU8
Creating a Credentialing Profile	Creating a New Credentialing Profile	https://youtu.be/fJFyOZn52ds
Submitted Credentialing Profiles	Complete a Submitted Application	https://youtu.be/5Cf8njfaHjE
	Request Revisions	https://youtu.be/MGoEneNINs0
Primary Source Verification	Creating a New Primary Source Verification	https://youtu.be/YesFvpfO770
Subscriptions	Creating or Completing a New Subscription	https://youtu.be/wMP-LlphMz0
Site Visit	Creating a Credentialing Site Visit	https://youtu.be/ZNJ9rA8oPXo

Organizational Providers, Staff Providers, and Individual Practitioners

Subject	Content/Lessons	Video Link
General Navigation	Navigating to Job Aids	https://youtu.be/JFGwZkb0K0s
	Navigating to your Credentialing Profile	https://youtu.be/4lrZuJOIGcg
Editing and Submitting Your Credentialing Profile	Completing a Credentialing Profile (Organizational Provider)	https://youtu.be/EmXQR0UykiU
	Completing a Credentialing Profile (Individual Practitioner)	https://youtu.be/DxHCmV1axKU
	Completing a Credentialing Profile (Staff Provider)	https://youtu.be/5Cf8njfaHjE
Completing Requested Revisions	Completing revisions when they have been requested	https://youtu.be/2Hi7Vxi8Qh4

Other Documents related to Universal Credentialing

Document Name	Purpose	Audience
How to Search for Providers	Use the universal search in the system to verify providers or organizations are not in the system	PIHPs & CMHSPs
Universal Credentialing Provider Entity Template (Service Locations)	Template for adding Service Locations	Organizational Providers
Universal Credentialing Provider Entity Template (Organizational Provider)	Template for adding Organizational Providers	PIHPs & CMHSPs
Universal Credentialing Provider Entity Template (Individual Practitioner)	Template for adding Individual Practitioners	PIHPs & CMHSPs
Universal Credentialing FAQs	Universal Credentialing frequently asked questions	PIHPs, CMHSPs, & Practitioners
Universal Credentialing Process Flow	Process flow for the Universal Credentialing process	PIHPs, CMHSPs, & Practitioners
Universal Credentialing CVO Process Design (1-8-2024)	Process flow for the Universal Credentialing CVO process	PIHPs, CMHSPs, & Practitioners
Quality Checklist	Required when completing a Subscription	PIHPs & CMHSPs

Key Terms & Definitions

Credentialing Profile - A service provider's record in the MDHHS BH CRM containing all information and documentation required to become credentialed. All information is entered/uploaded by the provider as part of their application process. Credentialing Profiles come in two separate types with a different set of required fields and documentation – one for Organizational Providers, and one for Individual Practitioners. All Credentialing Profiles are visible by all PIHP or CMHSP Credentialing Admin users throughout Michigan. Each provider can only ever have one active Credentialing Profile.

Responsible Credentialing Coordinator (RCC) – The PIHP or CMHSP organization that has been identified as being responsible for overseeing a provider's Credentialing Profile application process and maintenance of the provider's Credentialing Profile after its completion. The RCC role is automatically assigned to the PIHP or CMHSP that first creates a Credentialing Profile application for a provider. Each provider will always have one RCC assigned to them. RCC's can be re-assigned as needed by MDHHS under circumstances that require a change in assignment (i.e., the incumbent RCC is no longer contracting services from the provider).

Organizational Provider - Also called Organization: an entity that directly employ and/or contract with individuals to provide health care services. Examples of Organizational Providers include, but are not limited to, Community Mental Health Services Programs (CMHSPs); hospitals; nursing homes; homes for the aged; psychiatric hospitals, units, and partial hospitalization programs; substance abuse programs; and home health agencies.

Individual Practitioner - Also called Individual Provider: an individual who is engaged in the delivery of healthcare services and is legally authorized to do so by the State in which he/she delivers the services.

Primary Source Verifications (PSV) - A record completed by a PIHP or CMHSP containing the resulting data and documentation from a completed Primary Source Verification – which is primarily comprised of various background checks. Multiple PSVs can be created off a completed Credentialing Profile, by any PIHP or CMHSP Credentialing Admins interested in credentialing the associated provider.

Credentialing Verification Organization (CVO) - Credentialing Verification Organizations are external organizations that work with PIHPs (primarily for the larger regions – Detroit Wayne, Macomb, Oakland) to handle the completion Primary Source Verifications.

