Provider Update policies v2 6/24/15

This document notes the specific rules that need to be followed when updating Harmony I&R providers.

- You'll need the **role that provides permissions** for provider updates.
  o Your agency admin can set you up with it.

- **Provider names must be unique**
  o If there's a collision with an existing SAMS provider, work with Dick Laverty to find a unique name
  o If the provider collides with an I&R provider, choose a unique name – often done by appending the town of the provider's location.

- The **Provider's Long Description** field contains the following information. Maintain the formatting for readability. (Going forward, these could be moved into respective Harmony fields where possible.)
  o Agency Description
  o Site Information
    ▪ Description
    ▪ Hours
  o Program name (one section for each program)
    ▪ Description
    ▪ Hours
    ▪ Fees
    ▪ Application Process
    ▪ Relevant Notes

- **Telephone number types** must be chosen from Harmony's pick list, using the closest match.

- **Services are named with their taxonomy terms**
  o They start with "z_ " to keep them separate from SAMS services
  o The taxonomy term corresponding to the taxonomy code is used for the service name.
  o Multiple taxonomy codes generate multiple services
    ▪ Note on Y and other codes used as modifiers of the main code: these can be created as separate services; searches will then find the provider. You may choose to add them to the main service to capture that modifier relationship.
  o To see the Taxonomy Term Description, do a Search for either the term or the code. The search results show the descriptions.
  o In rare cases, when you enter the taxonomy code you won't find it in the Harmony version of the taxonomy, if the code comes from a more recent version. You can use [211Taxonomy.org Search by Taxonomy Code](#) to look up

the code to find its taxonomy term, then search in the Harmony Taxonomy area to find the nearest code.

- **Taxonomy updates**
    - o When **Harmony updates their taxonomy** version, corresponding changes will need to be made in providers
    - o Agencies may need to coordinate with Harmony on this, and obtain the 211Taxonomy documents describing the changes
    - o VT 211 may be able to provide guidance
    - o The "TaxonomyUpdateGuidelines.pdf" on the 211Taxonomy.org site may help