YouTube Video Training: HCBS SETS Provider Portal Provider Self Assessments PSA (5:10)

SETS Provider Portal Self-Assessments (PSAs)

Notice: It is important to note that Providers will only add Settings to the Provider Portal when:

a. They initially gain access to the Provider Portal.
b. If they build/add a new Setting associated with their provider.

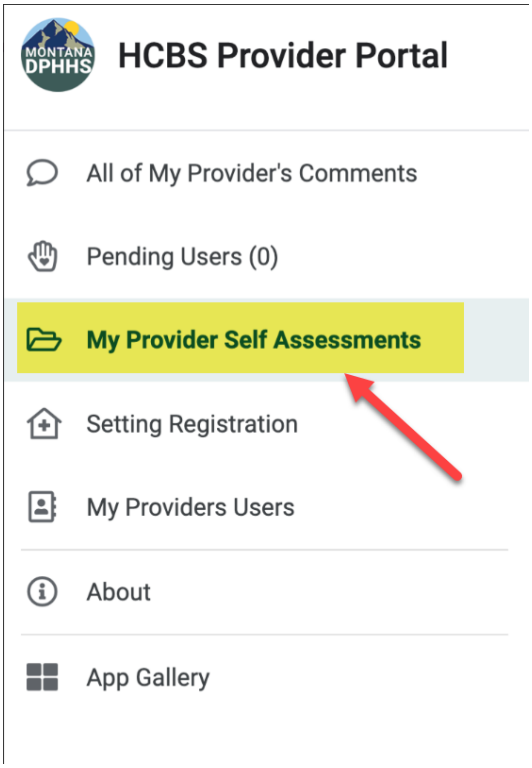
*Once a Setting is established in the Provider Portal, that is where a provider will complete Provider Self-Assessments. There is no need to create a new Setting when completing a new Provider Self-Assessment.

Viewing a List of PSAs

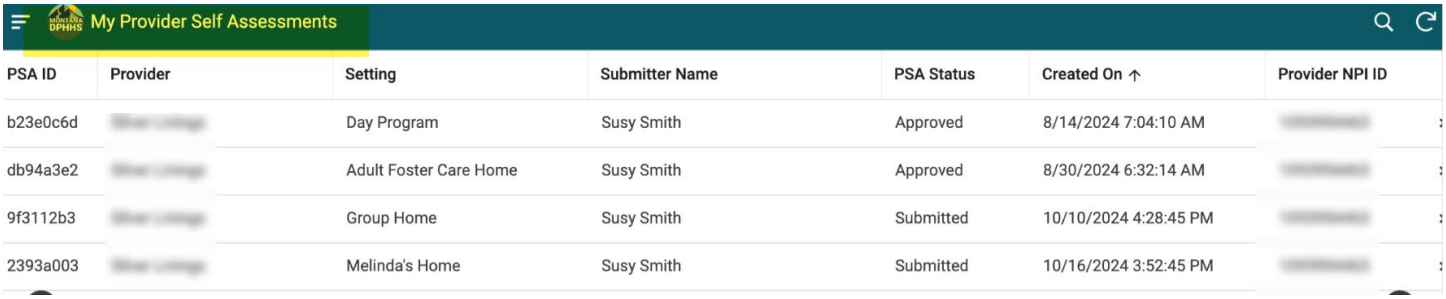
All PSAs (including those in Draft) for all of a Provider's Settings can be viewed from the My Provider Self Assessments list.

1. Click the Main Menu on any page.

2. Locate the My Provider Self Assessments list from the item list.

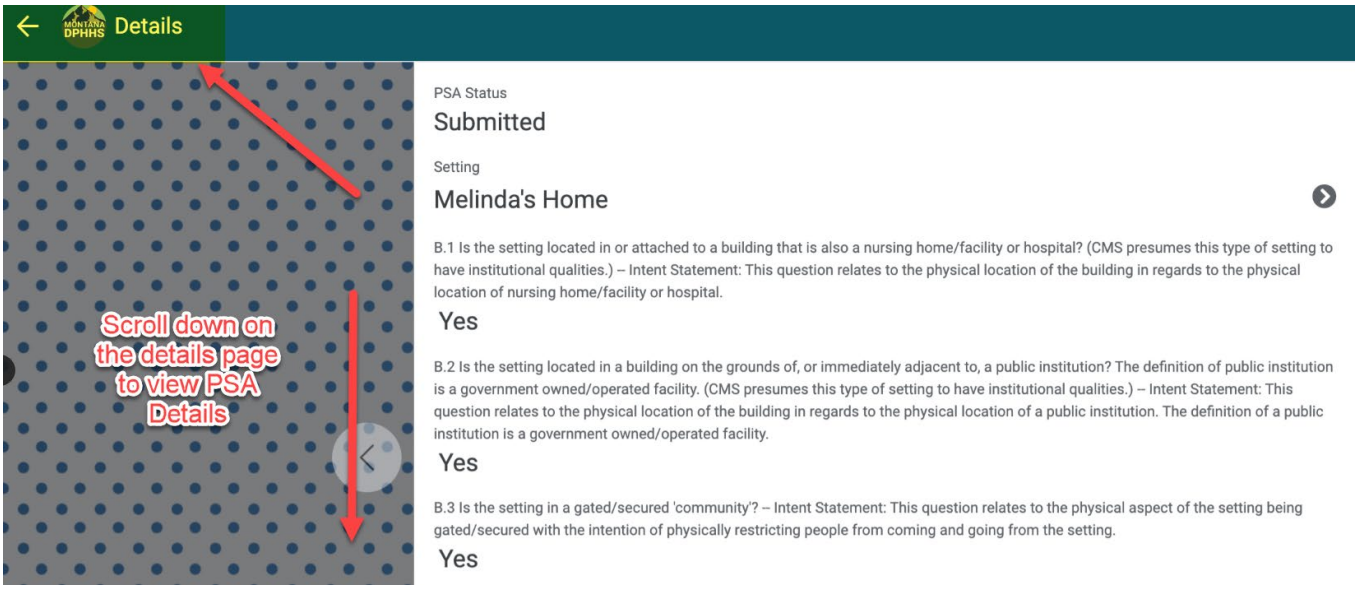


3. The list displays info for all PSAs, including those in Draft status.



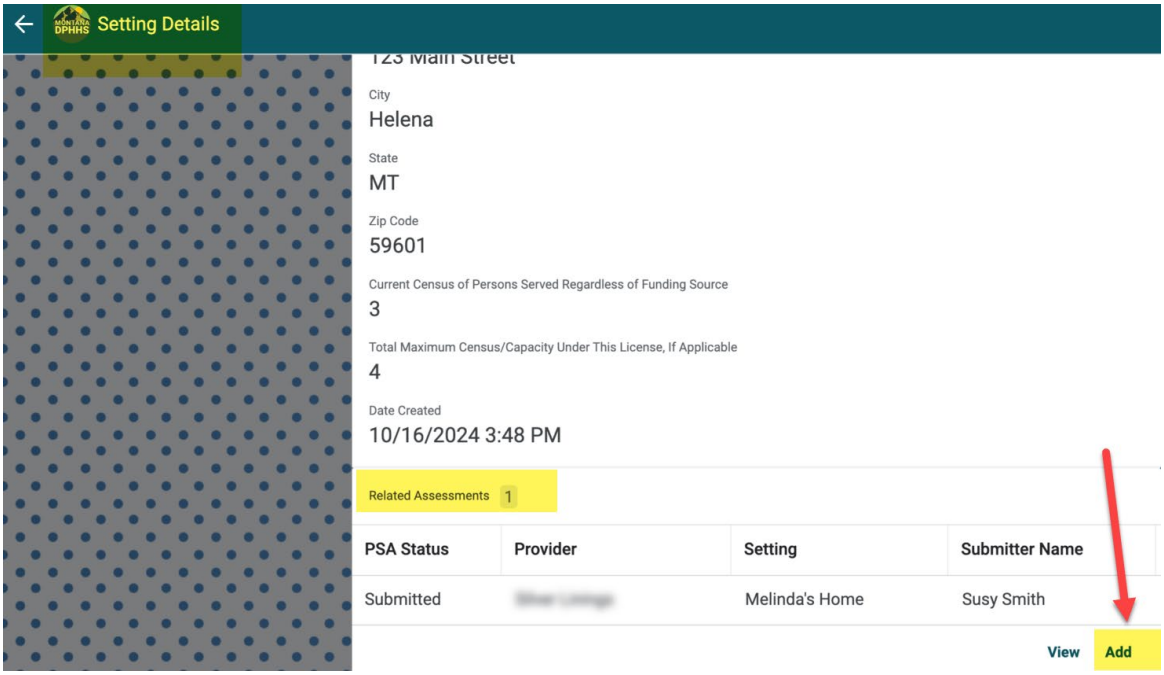
PSA ID	Provider	Setting	Submitter Name	PSA Status	Created On ↑	Provider NPI ID
b23e0c6d	[redacted]	Day Program	Susy Smith	Approved	8/14/2024 7:04:10 AM	[redacted]
db94a3e2	[redacted]	Adult Foster Care Home	Susy Smith	Approved	8/30/2024 6:32:14 AM	[redacted]
9f3112b3	[redacted]	Group Home	Susy Smith	Submitted	10/10/2024 4:28:45 PM	[redacted]
2393a003	[redacted]	Melinda's Home	Susy Smith	Submitted	10/16/2024 3:52:45 PM	[redacted]

4. Access the PSA Details page by clicking on the PSA record in the list. The PSA Details page is long (scroll down to view all contents).



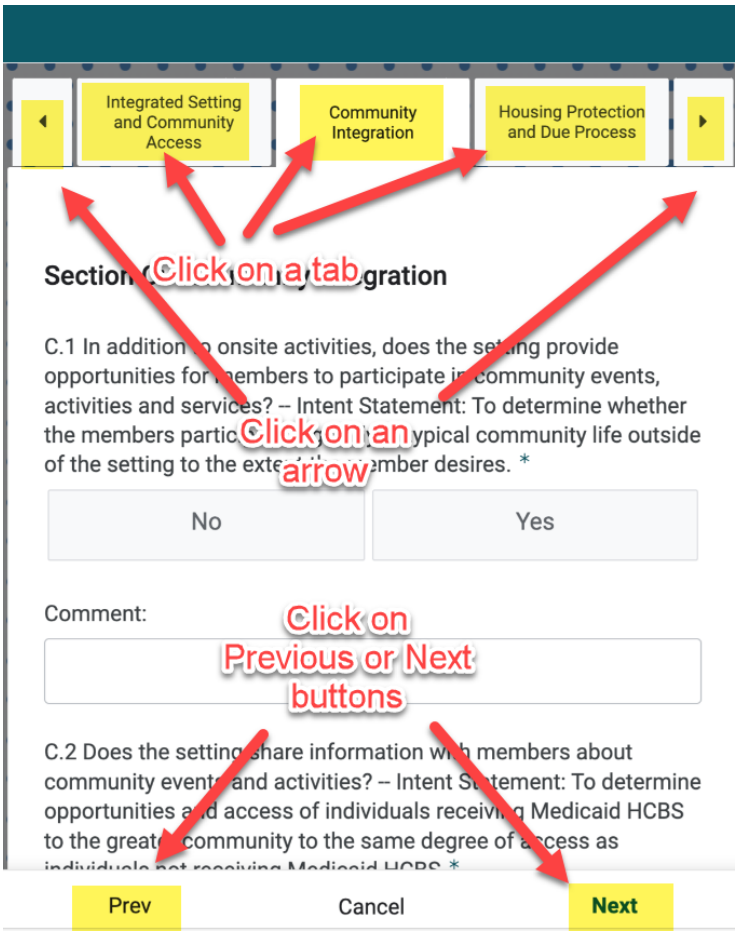
Starting a PSA

1. Navigate to the Setting Details of the Setting for which you wish to submit a PSA.
2. Scroll down to the Related Assessments area.
3. Click the Add text.

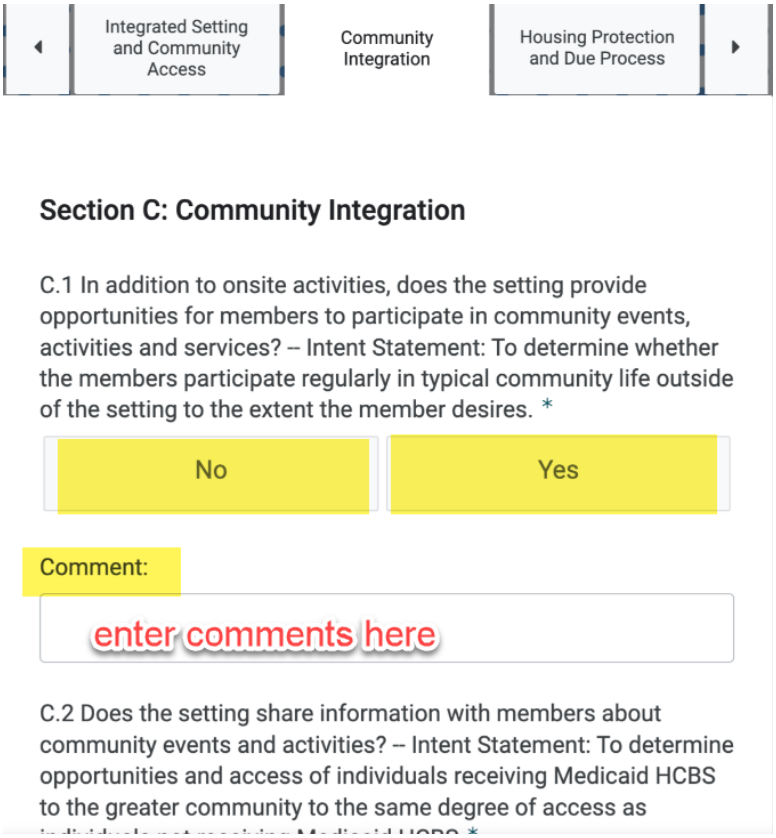


Completing the PSA

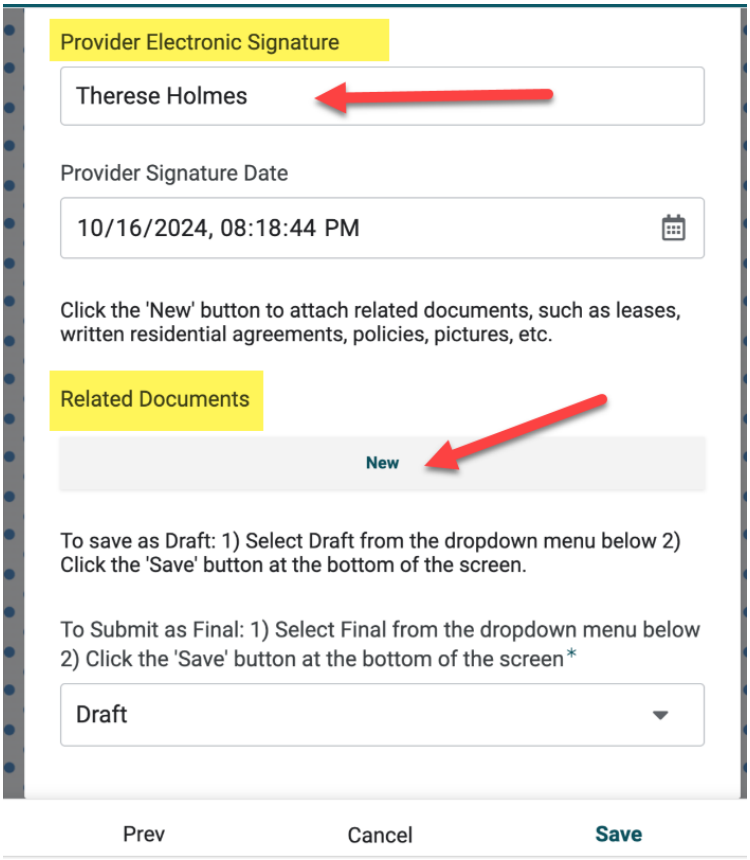
All PSA questions appear on applicable tables across the tops of the PSA. Click on a tab, use the arrow at the top, or use the Next and Prev buttons at the bottom of the screen to navigate through the PSA tabs.



1. Answer questions by clicking the question's No or Yes button. All questions are required.
2. Provide additional Comments for each question if desired. Comments are optional.



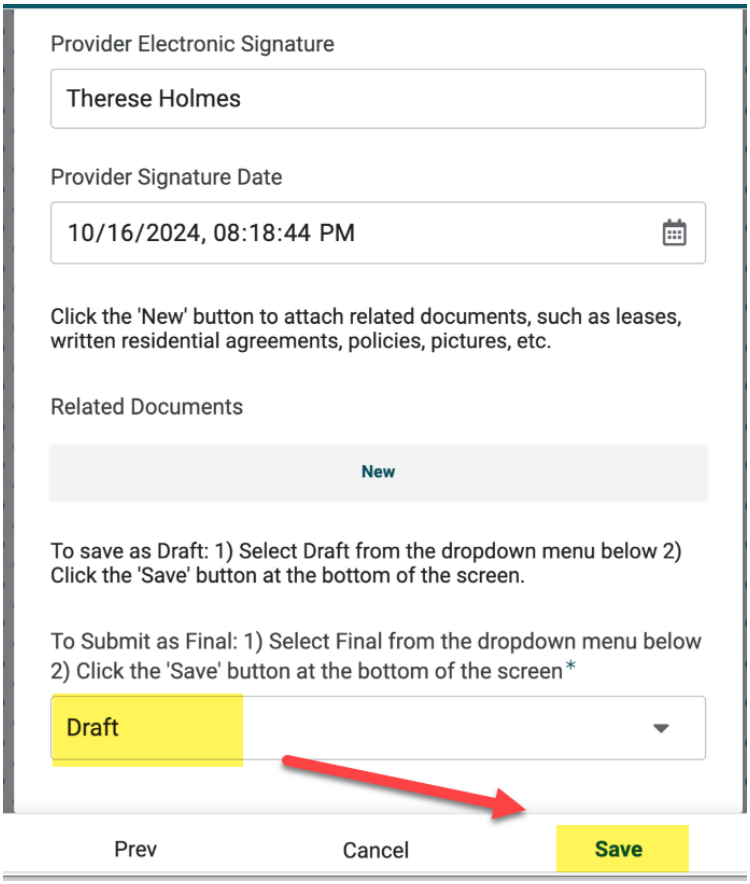
3. You must attest to your answers by typing your name in the Provider Electronic Signature text box on the Attestation tab.
4. Optionally, you may add Related Documents by clicking the New button on the Attestation tab and following the prompts.



Saving a Draft versus Submitting a Final PSA

You may save a Draft PSA, allowing you to return, complete, and submit it later. Or, you may choose to save a Final PSA, which submits the PSA to HCBS staff. Final PSAs cannot be edited.

1. Select the desired Save type from the drop-down list (either Draft or Final).
2. Click the Save text at the bottom of the screen.



If you've saved a Draft PSA you can return to it later.

If you've saved a Final PSA, both you and HCBS staff will receive an email confirmation confirming your submission.

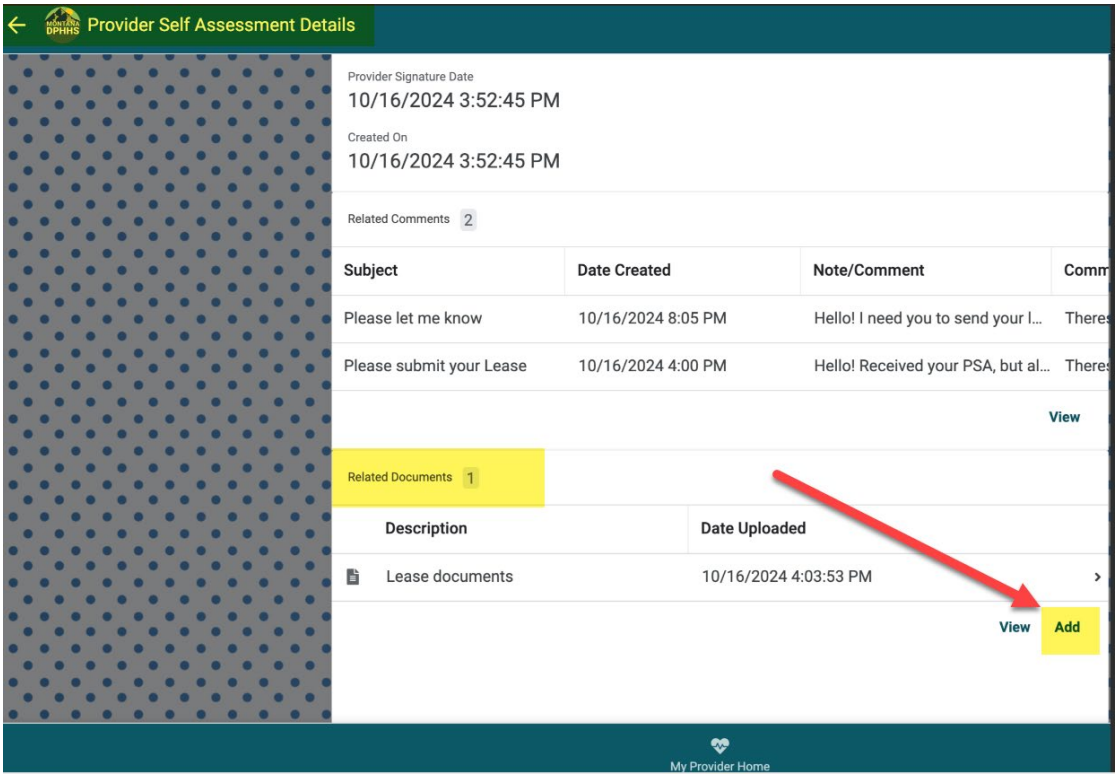
Managing a PSA

Locating/Adding PSA Related Documents

The PSA's Related Documents area is where any attachments added to the PSA by a Provider User (you)* or by HCBS are stored.

*Provider Users can add documents to a PSA record from the Provider Portal at any time. HCBS staff will not receive notification of an added document so you should contact HCBS staff outside of the system when adding additional documents to the PSA Related Documents area.

1. Navigate to the PSA Details page of a Setting's PSA.
2. Locate the Related Documents area.
3. Add a Related PSA Document by clicking the Add text and following the prompts.
4. View a Related PSA document that has been uploaded by clicking on it in the list. Note, you may have to click View to access the full list.



Receiving External Comments on a PSA

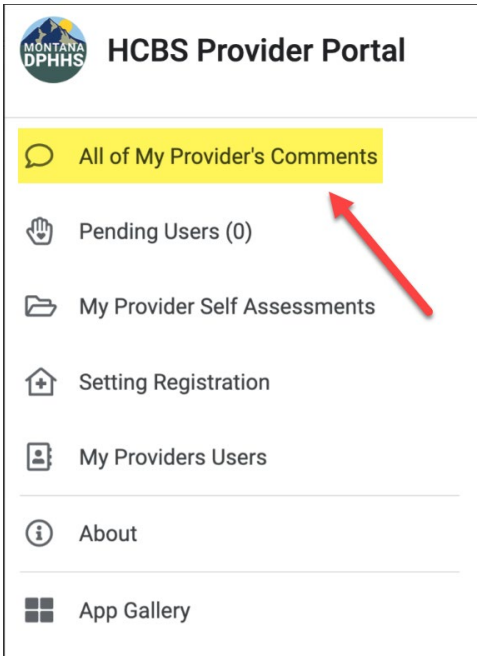
HCBS may add a comment or ask a question on a PSA by Adding one or more Related Comments.

Whenever HCBS staff Adds a Related Comment to a PSA, the Provider user who submitted the PSA receives an email notification instructing them to review the comment/question on the Provider Portal and provide an answer if applicable.

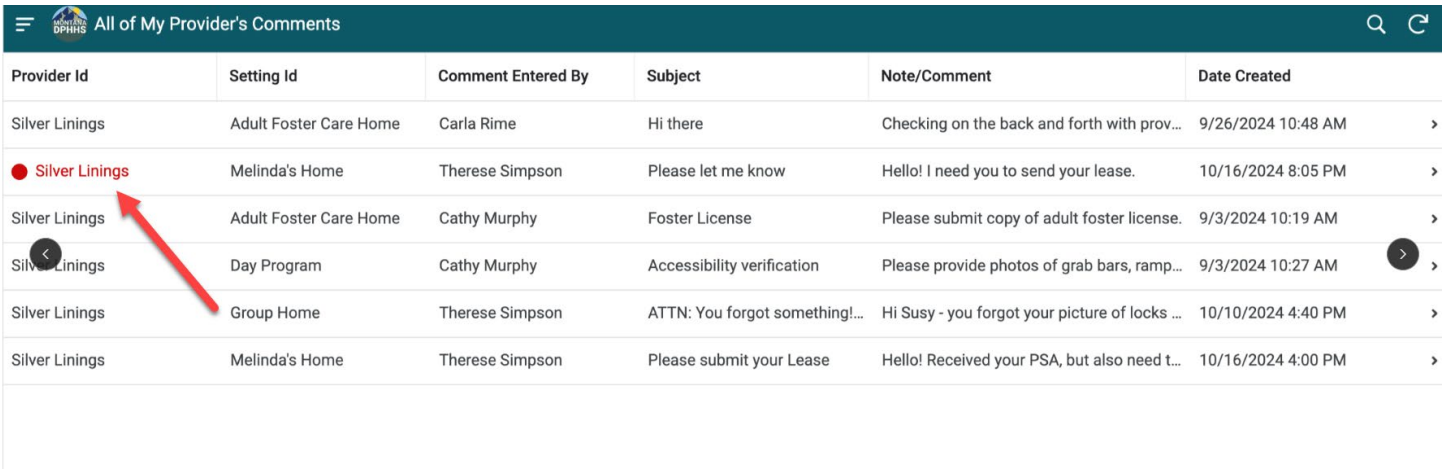
Adding (Responding To) External Comments on a PSA

Any Provider User may respond to an External Comment on a PSA. Note, Provider Users cannot initiate an External Comment on a PSA, they can only respond to an External Comment sent from HCBS.

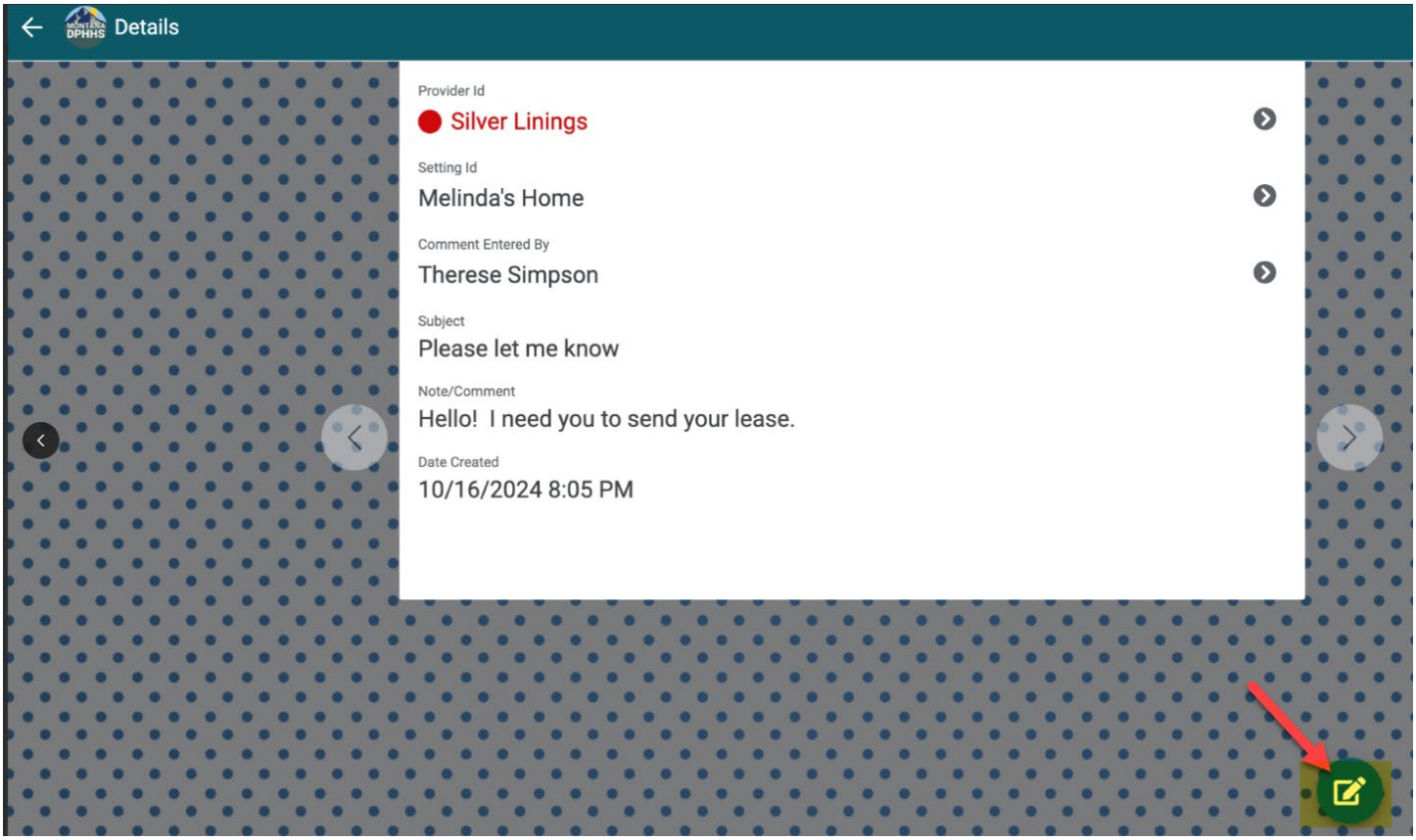
1. Navigate to the All of My Provider's Comments list from the Main Menu.



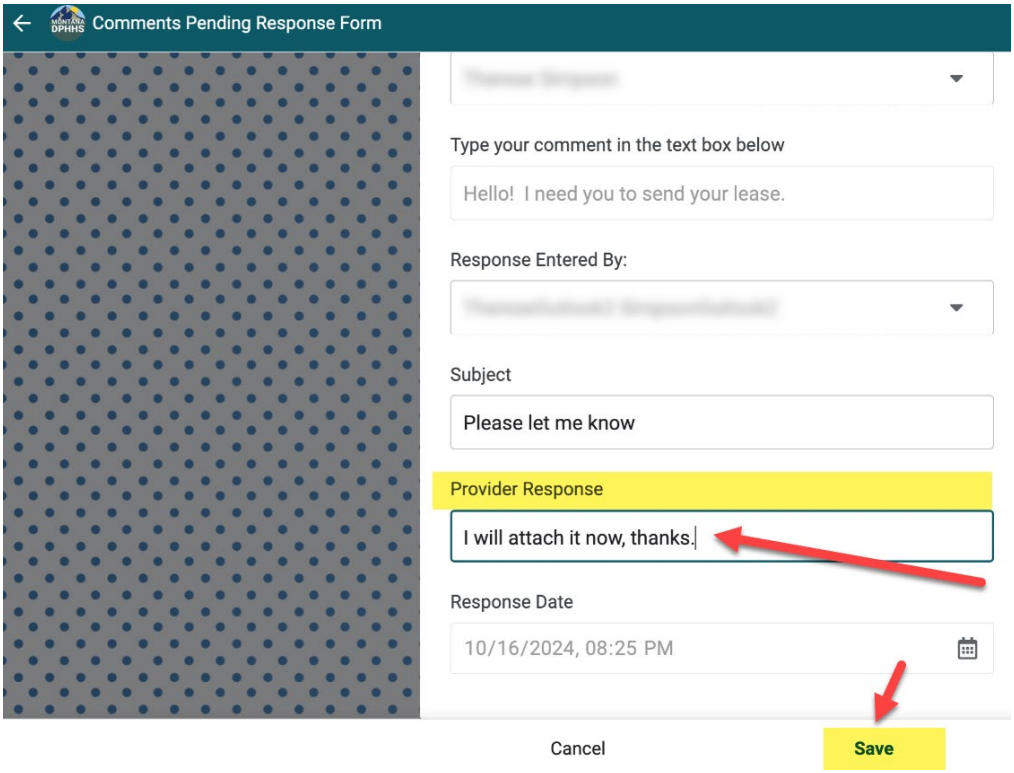
2. Any unanswered Comments appear with a round red circle under the Provider id column.



3. Click on the record to open it.
4. Click the Edit button.

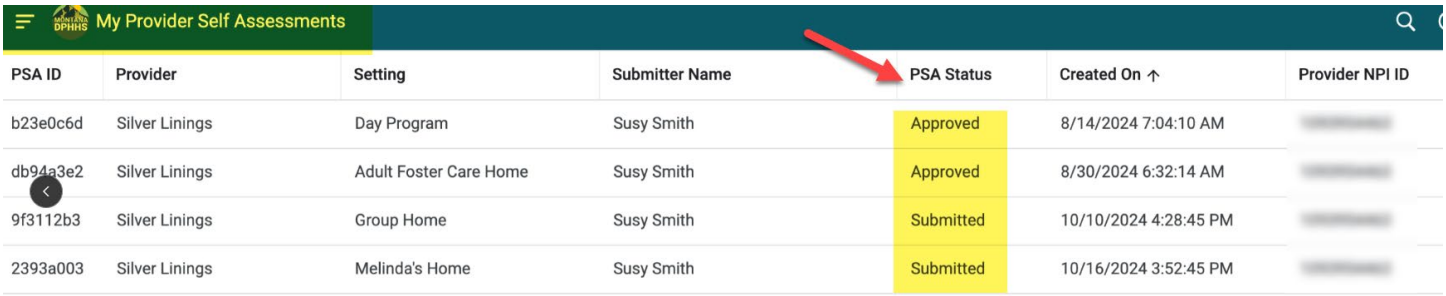


5. Type your response in the Provider Response field.
6. Click the Save text at the bottom of the page.



You can also respond to an External Comment from the Related Comments section of the PSA's Details page.

Whenever a Provider User Responds to a Related Comment to a PSA, HCBS staff receives an email notification.

Checking the PSA Status

Locate the current status of the PSA in the PSA Status field, either from the PSA's Details page, or from the My Provider Self Assessments List view.