

# CENTRAL REGISTRY PROCEDURE MANUAL

<b>Subject: Documenting Notes in the License Mini Panel</b>	<b>Number: 650-86</b>
<b>Effective Date: 4/26/19</b>	

## **PURPOSE:**

To provide instructions on when and how to document clear, concise notes in the License mini panel under the Licensee Edit module of the Central Registry for reference on a certification update or correction. This is used by EMSA billing, BLS Coordinator and by other certifying entities for clarification purposes.

## **REFERENCE:**

- Procedure 650-58 Renewing an EMT Certification
- Procedure 650-68 Reinstating an Expired EMT Certification

## **GUIDANCE:**

When to document notes in the License mini panel:

- Erroneous expiration date - an expiration or effective date may have been entered incorrectly before July 1, 2017, when certifying entities had access to change date fields. If this affects their certification, employment or EMT card, notes will assist with clarification. The certifying entity that issued incorrect dates will need to document notes as to what occurred for reference and clarification to EMSA and other certifying entities who may work with the certification in the future.
- Renewal back dating – if an EMT met all requirements before their expiration date, but the certifying entity did not enter the certification into the Registry until after the expiration date (but within the 14 days required in regulation). The certifying entity will choose the “reinstate” tab to process the certification even though it is a renewal, send a helpdesk request to EMSA with date correction needed, document notes in the license mini-panel explaining that requirements were met on time for the renewal, but entry to the registry was delayed. This will assist when other staff or certifying entities see the License mini panel that will display the reason changed to “reinstatement” and an inaccurate checklist history.
- Non-entry to the Registry – if an EMT was processed and issued an EMT card by a certifying entity, but the certification was not documented in the Central Registry. The EMSA BLS Coordinator will need to be contacted to assist with the missing cycle and date corrections. The certifying entity will need to document notes as to what occurred for reference and clarification to EMSA billing staff, the BLS Coordinator, other certifying entities who may work with the certification in the future.

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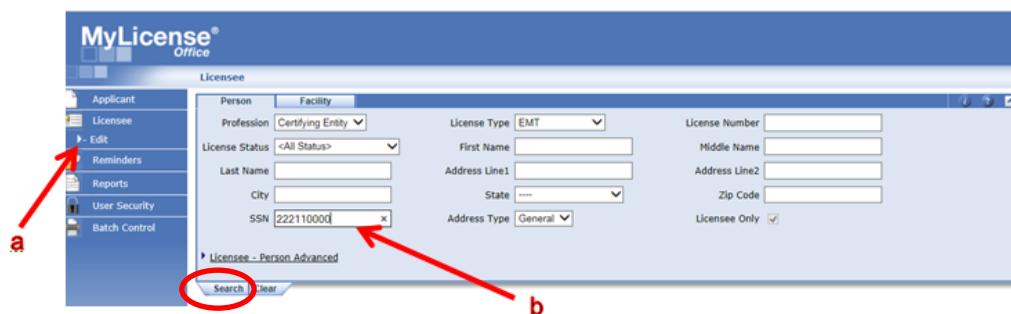
- Certification on the wrong EMT profile – when certification staff accidentally process a renewal or reinstatement on the wrong EMT profile. This may occur due to not cross-checking the name with the SSN, DOB, address, etc. The certifying entity will need to contact the EMSA BLS Coordinator to assist with revising the profile back to the proper prerequisite relationship, dates and status. The agency will need to document notes as to what occurred for reference and clarification to EMSA billing staff and the certifying entity in which the EMT is currently certified as the checklist history cannot be changed and will not reflect an accurate history.
- Withdrawn/Abandoned applications – when an EMT submits an application, it is entered to the Registry but left incomplete (pending) due to missing requirements or the EMT does not complete the process. The certifying entity will remove (withdraw) the application and choose the reason. Documenting notes in the license panel will assist other certifying entities when the EMT applies elsewhere and will assist EMSA billing.

## PROCEDURE:

Ensure that your notes are clear, concise and factual.

How to document notes/remarks in the License mini panel:

1. In the left column of the Central Registry under Licensee, click >Edit (a) and enter the SSN (b) for the person record/certification that you wish to search. You may also search by last name or E#.



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2. This is the window that will open. Here you will see the whole EMT profile.

The screenshot displays the 'Licensee' profile window. At the top, there are tabs for 'Person' and 'Facility'. Below is a search bar with 'Search' and 'Clear' buttons. The main section is titled 'Search Results' and shows a table with one entry for 'Contrary, Mary Jo Orange' (EMT) with license number E129359, issued on 06/28/2017, and expires on 07/31/2019. Below this is a section 'All Licenses held by - Contrary, Mary Jo Orange' showing two EMT licenses, one active and one archived. The bottom half of the window contains several detail panels: 'Person' (Name: Mary Jo Orange, DOB: 06/01/1975, SSN: 222110000), 'License' (Type: EMT, Number: E129359, Status: Active, Issue Date: 06/28/2017), 'Prerequisites' (Sacramento County EMS Assoc., Certified By, Active), and 'Background Check' (Requested By: Sacramento County EMS Agency, Date of CORI or Verif Letter: 05/01/2017, ATI Number: Vary contrary).

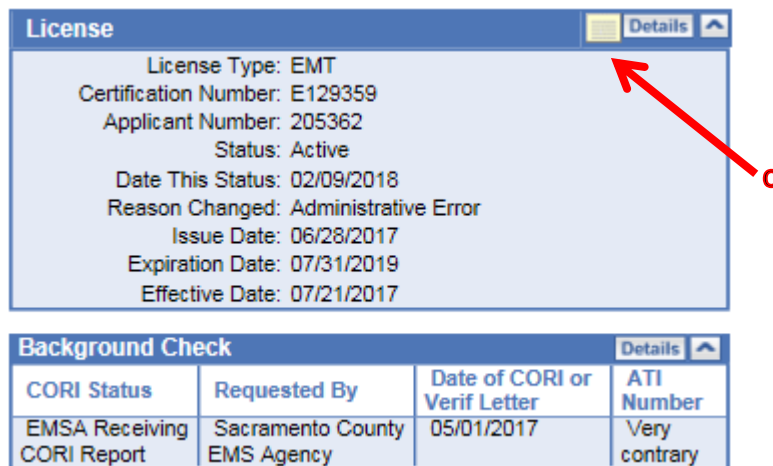
3. Scroll down to the License mini panel (a) and click on the yellow notepad (b) in the top right corner of the panel.

This image is a close-up of the 'License' mini panel. A red arrow labeled 'a' points to the 'License' title bar at the top left. Another red arrow labeled 'b' points to a yellow notepad icon in the top right corner of the panel. The panel content includes: License Type: EMT, Certification Number: E129359, Applicant Number: 205362, Status: Active, Date This Status: 02/09/2018, Reason Changed: Administrative Error, Issue Date: 06/28/2017, Expiration Date: 07/31/2019, and Effective Date: 07/21/2017.

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You will see lines on the notepad if a prior note exists on this profile as shown below (c):



**License** Details

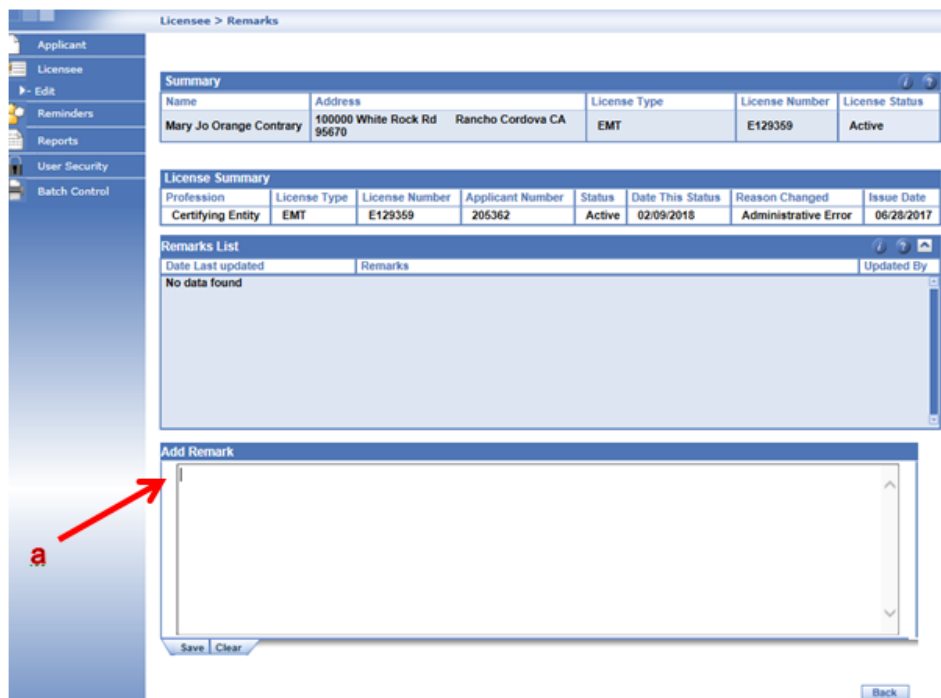
License Type: EMT  
Certification Number: E129359  
Applicant Number: 205362  
Status: Active  
Date This Status: 02/09/2018  
Reason Changed: Administrative Error  
Issue Date: 06/28/2017  
Expiration Date: 07/31/2019  
Effective Date: 07/21/2017

**Background Check** Details

CORI Status	Requested By	Date of CORI or Verif Letter	ATI Number
EMSA Receiving CORI Report	Sacramento County EMS Agency	05/01/2017	Very contrary

4. You will see one of two options to ADD a note or remark. See the examples of these two possibilities in the screenshots below:

- **Add a new remark** if there is no prior note (a). **See Step #5 for instructions.**



Licensee > Remarks

Summary

Name	Address	License Type	License Number	License Status
Mary Jo Orange Contrary	100000 White Rock Rd 95670 Rancho Cordova CA	EMT	E129359	Active

License Summary

Profession	License Type	License Number	Applicant Number	Status	Date This Status	Reason Changed	Issue Date
Certifying Entity	EMT	E129359	205362	Active	02/09/2018	Administrative Error	06/28/2017

Remarks List

Date Last updated	Remarks	Updated By
No data found		

Add Remark

Save Clear

Back

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OR

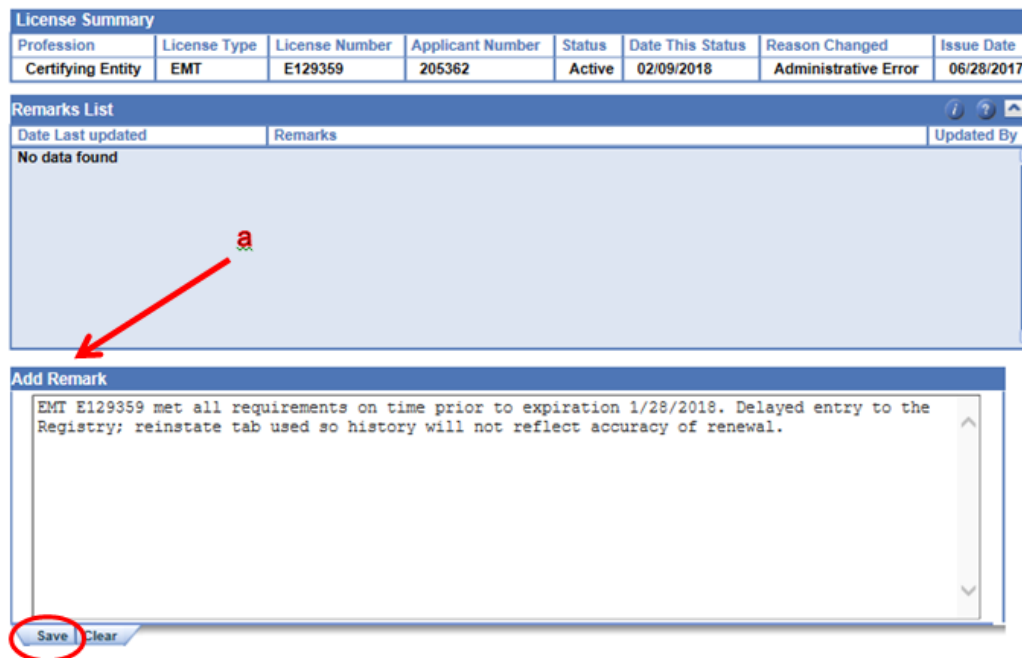
- **Add to an existing remark.** This is used if any previous remark/notes exist. It may be a new scenario, but you will still follow the procedure to open an existing remark (b). **See Step #7 for instructions.**



Date Last updated	Remarks	Updated By
08/11/2011 10:32:59 AM	8/11/11-mnt view fd	ivaldez

**b**

5. **To add a new remark**, start typing in the “Add Remark” (a) and then click SAVE.



Profession	License Type	License Number	Applicant Number	Status	Date This Status	Reason Changed	Issue Date
Certifying Entity	E129359	E129359	205362	Active	02/09/2018	Administrative Error	06/28/2017

Date Last updated	Remarks	Updated By
No data found		

**a**

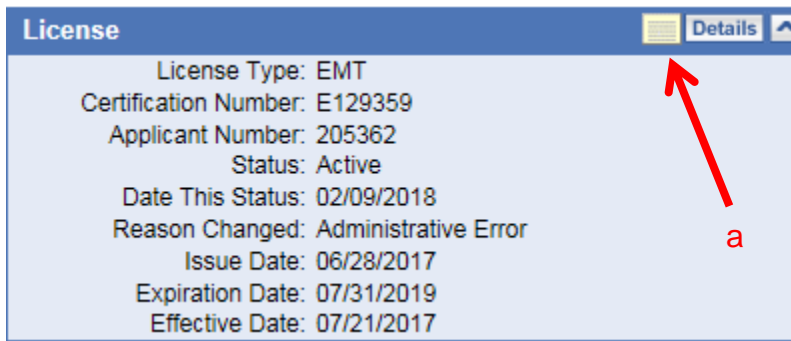
EMT E129359 met all requirements on time prior to expiration 1/28/2018. Delayed entry to the Registry; reinstate tab used so history will not reflect accuracy of renewal.

**Save** Clear

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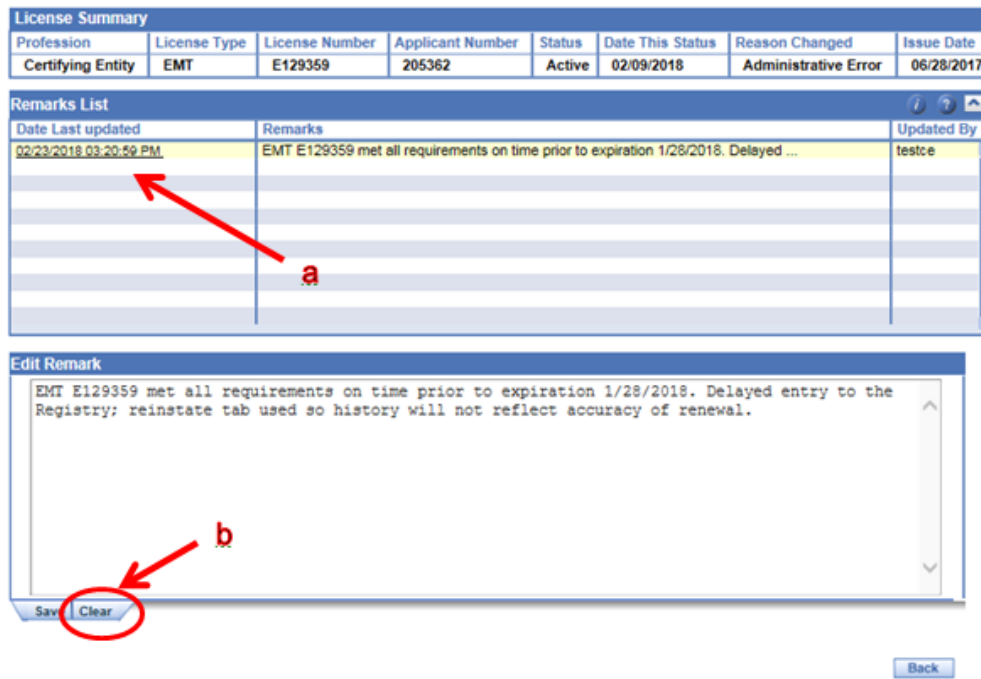
6. This will bring you back to the License mini panel and will show that there are remarks in the yellow notepad (a).



**License** Details

License Type: EMT  
Certification Number: E129359  
Applicant Number: 205362  
Status: Active  
Date This Status: 02/09/2018  
Reason Changed: Administrative Error  
Issue Date: 06/28/2017  
Expiration Date: 07/31/2019  
Effective Date: 07/21/2017

7. **To add a remark to a profile that has an existing remark:**
- Click on a prior note to add more or the most recent underlined note (a) to add a new one.
  - Then click the Clear tab (b) and type a new note. Clicking on clear does not delete the prior note, but removes it temporarily to add a new one. Once you save the note, both (or all) notes remain in the history. If you do not click "Clear," then the notes will duplicate and appear redundant.



**License Summary**

Profession	License Type	License Number	Applicant Number	Status	Date This Status	Reason Changed	Issue Date
Certifying Entity	EMT	E129359	205362	Active	02/09/2018	Administrative Error	06/28/2017

**Remarks List**

Date Last updated	Remarks	Updated By
02/23/2018 03:20:59 PM	EMT E129359 met all requirements on time prior to expiration 1/28/2018. Delayed ...	testce

**Edit Remark**

EMT E129359 met all requirements on time prior to expiration 1/28/2018. Delayed entry to the Registry; reinstate tab used so history will not reflect accuracy of renewal.

Save Clear Back

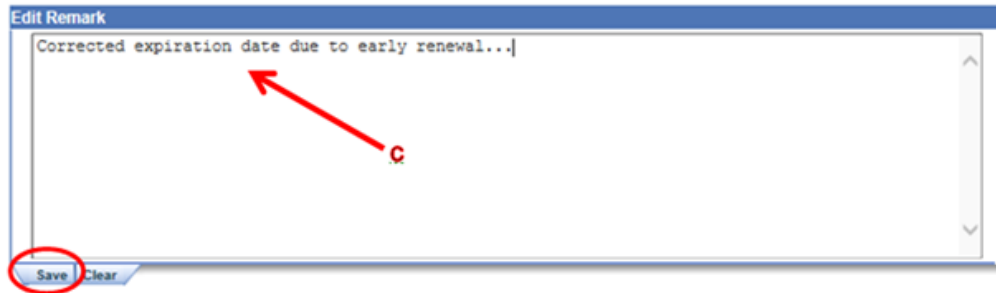
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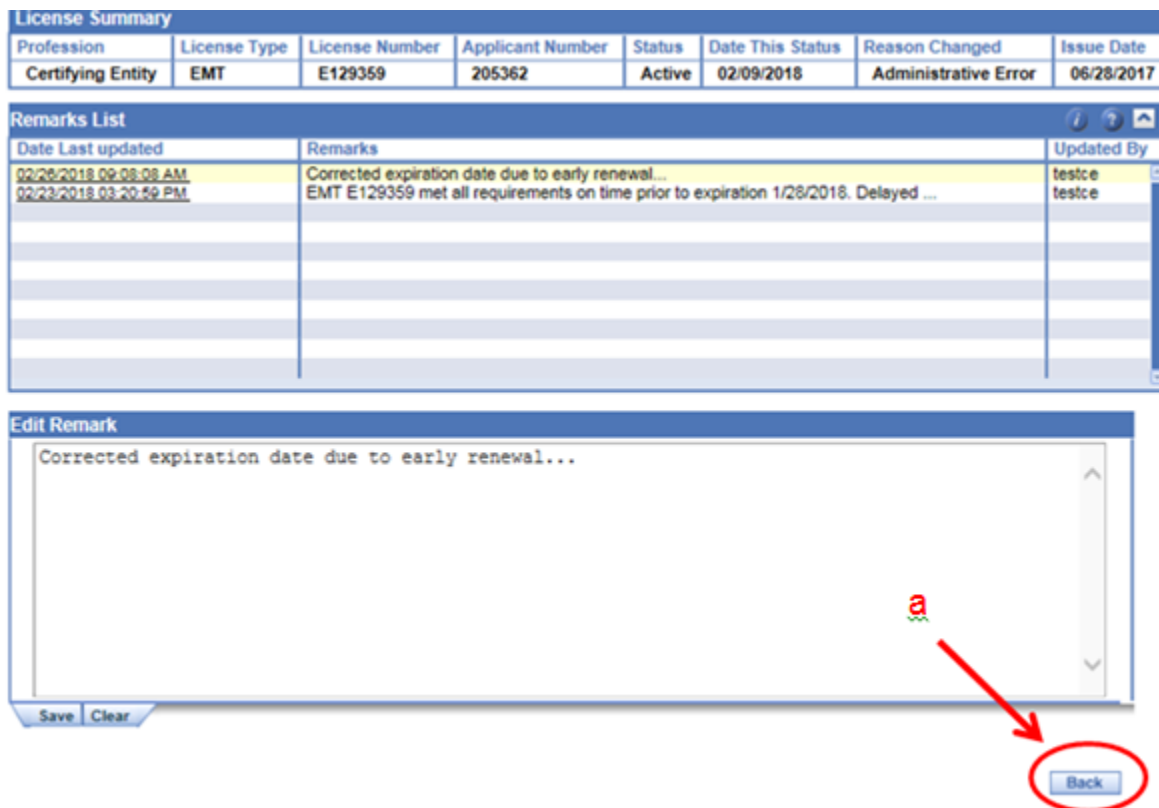
- Start typing the new note (c) and once finished, click on SAVE.



Corrected expiration date due to early renewal...]

Save Clear

8. The final screen you will see when adding to an existing remark is the following which shows both remarks added. Once you are done, click BACK (a) to complete the process and return to the full profile in Licensee Edit.



Profession	License Type	License Number	Applicant Number	Status	Date This Status	Reason Changed	Issue Date
Certifying Entity	EMT	E129359	205362	Active	02/09/2018	Administrative Error	06/28/2017

Date Last updated	Remarks	Updated By
02/20/2018 09:08:08 AM	Corrected expiration date due to early renewal...	testce
02/23/2018 03:20:59 PM	EMT E129359 met all requirements on time prior to expiration 1/28/2018. Delayed ...	testce

Corrected expiration date due to early renewal...

Save Clear

Back