

HOW TO CHANGE YOUR TAXONOMY CODE

CONTENTS

What is a Taxonomy Code?	1
Why does it need to be accurate?	1
Overview of Procedure for Updating Taxonomy Code.....	2
START HERE TO CHANGE YOUR TAXONOMY CODE ↓	4
STEP 1: Log Into the NPPES Website.....	4
STEP 2: Update Your Provider Profile	4
STEP 3: Update Address Information.....	6
STEP 4: Endpoint for Exchanging Healthcare Information (optional).....	6
STEP 5: Other Identifiers (optional)	7
STEP 6: Change Taxonomy	7
STEP 7: Update Contact Info	9
STEP 8: Error Check Page	9
STEP 9: Submission Page.....	10
STEP 10: Confirmation Page.....	10
APPENDIX 1: CalAIM Implementation and Taxonomy codes	11
APPENDIX 2: Common Taxonomy codes for BH Providers.....	11
APPENDIX 3: About NPI Numbers and Taxonomy Codes	13
APPENDIX 4: How to Check Your Taxonomy Code in Avatar	14

What is a Taxonomy Code?

A taxonomy code is a unique 10-character code that designates your classification and specialization. You will use this code when applying for a National Provider Identifier, commonly referred to as an NPI. For more information about NPI number and taxonomy codes, see Appendix 3.

Why does it need to be accurate?

CalAIM implementation requires updating and maintaining practitioner credentials. These are verified through the National Plan and Provider Enumeration System (NPPES) website. Clinicians and agencies use this website to assign NPI numbers and Taxonomy codes.

HOW TO CHANGE YOUR TAXONOMY CODE

If your Taxonomy code needs updating, see the information below. For more information about this topic, see **Appendix 1** at the end of this document.

Overview of Procedure for Updating Taxonomy Code

CHECK BEFORE YOU START: Check your taxonomy code on the NPPES website and in Avatar.

STATUS	What to do
If NPPES is correct, i.e., your taxonomy code matches your license.	You are done!
If NPPES is not correct.	Update your Taxonomy code and send a message to askqi@santacruzcounty.us to report you have updated.

OVERVIEW (STEPS):

1. Login to the NPPES website. <https://nppes.cms.hhs.gov>
2. Navigate the website to the area where you can modify (or add) your taxonomy code.
3. Click Select Add Taxonomy to add a new taxonomy, or click the pencil icon to edit.
4. Enter/Update your license information, and other information, if needed.
5. Click Save
6. Go to the Submission Page. Read through and then check the Certification Statement box at the bottom of the page.
7. Send a message to askqi@santacruzcounty.us letting them know you have made a change to your taxonomy code.

Check Your Taxonomy Code on the NPPES Verification Website

If your taxonomy code is correct on the NPPES verification website (different than the main website), then you do not need to update it. Follow the steps below to check.

STEPS:

1. Navigate to the NPPES NPI lookup page. <https://npiregistry.cms.hhs.gov/search>
2. Enter your name and click SEARCH.

HOW TO CHANGE YOUR TAXONOMY CODE

Search NPI Records

Enter name

NPI Number <input type="text"/>	NPI Type Any <input type="button" value="v"/>	Taxonomy Description <input type="text"/>		
<small>for individuals</small>				
Provider First Name Nancy <input type="text"/>	Provider Last Name Mast <input type="text"/>			
<small>for organizations</small>				
Organization Name (LBN, DBA, Former LBN or Other Name) <input type="text"/>	Authorized Official First Name <input type="text"/>	Authorized Official Last Name <input type="text"/>		
City <input type="text"/>	State Any <input type="button" value="v"/>	Country Any <input type="button" value="v"/>	Postal Code <input type="text"/>	Address Type Any <input type="button" value="v"/>
<input type="checkbox"/> Check this box to search for Exact Matches only !				
<small>** This search page is by default set to return similar and close results to your search keywords. You can check the box above if you only want the exact matches for your keywords to be returned in the search results.</small>				
<small>Note: The NPI Registry limits searches to the first 2100 results. If you cannot find the NPI that you are looking for, please refine the search.</small>				
<input type="button" value="Clear"/>	<input type="button" value="Search"/>	Then click search		

3. Look at the taxonomy code at the bottom of the page. It should match your license/registration.

Taxonomy	Primary Taxonomy	Selected Taxonomy
	Yes	106H00000X - Marriage & Family Therapist

If you are not sure what your Taxonomy code should be, see **Appendix 2** at the end of this document.

If you are still not sure, talk to your supervisor, or send a message to askqi@santacruzcountyca.gov.

HOW TO CHANGE YOUR TAXONOMY CODE

START HERE TO CHANGE YOUR TAXONOMY CODE



STEP 1: Log Into the NPPES Website

NOTE: If you do not know your username or password for the NPPES website, you will have to retrieve the username and reset the password, which can take some time.

1. Go to <https://nppes.cms.hhs.gov/#/>
2. Type in your User ID and Password, and then click "SIGN IN."

NPPES
National Plan & Provider Enumeration System

Registered User Sign In

Log in to view/update your National Provider Identifier (NPI) record.

User ID ⓘ
I&A User ID, used to access NPPES, EHR & PE

Password

SIGN IN

FORGOT USER ID or PASSWORD?

STEP 2: Update Your Provider Profile

1. From the Main Page, scroll down to the to the Manage Provider Information section.






Manage Provider Information

You currently have access to the NPIs associated with the providers listed below. Click the expand icon to expand the provider and view all NPIs associated with the provider.

New If you would like to upload documentation related to an NPI associated with a provider, click the upload icon.

Please scroll to the right using the scroll bar at the bottom of the table.

Filter... ⓘ

Action	NPI	Type ▲	TIN
   	1013112515		XXX-XX-5519

HOW TO CHANGE YOUR TAXONOMY CODE

2. Click on the Pencil Icon to edit.



NPPES
National Plan & Provider Enumeration System

SEARCH NPI REGISTRY HELP

Sign Out


Please scroll to the right using the scroll bar at the bottom of this table to see all available columns and actions

Click the pencil icon to edit.

Action	NPI	Type	TIN	Legal Business Name	Primary
				Kilgariff, Karen	San

3. Fill in all of the required questions (red *).

Provider Profile

* Indicates Required fields.
Note: Fields with  icon will NOT be publicly available

Provider Name Information:

Prefix: * First: Middle: * Last:

Credential(s):(MD, DO, etc.)
MFT

Other Name:(If applicable)

Prefix: First: Middle: Last:

Type of Other Name: Credential(s):(MD, DO, etc.)

Other Identifying Information:

* Date of Birth: * Social Security Number(SSN):

* State of Birth:(If U.S.) Country of Birth:

CA - CALIFORNIA US - United States

4. Confirm your answers.

HOW TO CHANGE YOUR TAXONOMY CODE

5. At the bottom of the page, click the NEXT button to save and go to the next page.

NEXT >

STEP 3: Update Address Information

1. Navigate to the Address page
2. In the Practice Location section, click the pencil icon to edit.



Address

This information will be used to contact the provider if we have questions about the NPI application.

Business Mailing Address (Correspondence Address)

This is the address (can be a Post Office Box) where we can contact you directly to resolve any issues that may arise during our re



United States


Phone: (831) 454-5179

EDIT BUSINESS MAILING ADDRESS

Practice Location (only one required)

This is the physical address (cannot be a Post Office Box) where services are rendered. Multiple locations can be entered, but onl

Please scroll to the right using the scroll bar at the bottom of this table to see all available column

Actions	Primary Location	Address	City	State/Province/Region	Country	Office
	<input checked="" type="checkbox"/>	1400 Emeline Ave Bldg K	Santa Cruz	CA	US	

3. In the Business Practice Location section, update as needed.
4. At the bottom of the page, click the NEXT button to save and go to the next page.

NEXT >

STEP 4: Endpoint for Exchanging Healthcare Information (optional)

This page is optional. Click NEXT to skip.

NEXT >

HOW TO CHANGE YOUR TAXONOMY CODE

STEP 5: Other Identifiers (optional)

NEXT >

This page is optional. Click NEXT to skip.

STEP 6: Change Taxonomy

Look near the bottom of the page, for your current Taxonomy code(s).

Taxonomy

Provider's Taxonomy Information.

INFO: Taxonomy
The taxonomy fields have been cleared.

* Indicates Required fields.

You are required to identify at least one taxonomy to associate with your NPI. If you identify more than one, you must identify which one is the primary taxonomy. Provider Taxonomy code [National Uniform Claim Committee Website](#).

To enter a taxonomy code, start by entering either the taxonomy code, classification code, or specialty in the Choose Taxonomy Filter box. All taxonomies containing the data you enter will allow you to select the appropriate one. Once you have selected the appropriate Taxonomy code, the corresponding fields below the search box will be populated.

Choose Taxonomy Filter: **Q**

Filter by Taxonomy name or Taxonomy code.

* Choose Taxonomy:
Choose Taxonomy

* Classification Name/Specialization: License Number: State Issued:

Please scroll to the right using the scroll bar at the bottom of this table to see all available columns and actions

Primary Taxonomy	Taxonomy Code	Taxonomy Type	Group Type	License Number	State
<input checked="" type="checkbox"/>	106H00000X	Marriage & Family Therapist		36494	CA

HOW TO CHANGE YOUR TAXONOMY CODE

STEPS:

1. Type a few words to describe your license/registration.
2. Click the desired code from the list.
3. Click SAVE.

The screenshot shows the 'Taxonomy' section of a provider's information page. It includes a search filter, a dropdown menu of taxonomy codes, and 'CLEAR' and 'SAVE' buttons. Three blue callout boxes with numbered steps are overlaid on the interface:

- 1** Type a few words that describe your license or registration, e.g. "social work" (points to the search filter).
- 2** Click the desired taxonomy code to enter. (points to the dropdown menu).
- 3** Click SAVE. (points to the green 'SAVE' button).

4. If you have more than one Taxonomy code, select a "Primary Taxonomy" by clicking the check box of the row with the correct Taxonomy.

Please scroll to the right using the scroll bar at the bottom of this table to see all available columns and actions

The screenshot shows a table with a filter box at the top. A blue callout box points to the first row of the table, containing the text: "Make sure that your current Taxonomy code is checked before saving." The checkbox in the 'Primary Taxonomy' column for the first row is checked and circled in red.

Primary Taxonomy	Taxonomy Code	Taxonomy Type	Group Type	License
<input checked="" type="checkbox"/>	106H00000X	Marriage & Family Therapist		36494
<input type="checkbox"/>	101YM0800X	Counselor - Mental Health		

5. At the bottom of the page, click the NEXT button to save and go to the next page.



HOW TO CHANGE YOUR TAXONOMY CODE

STEP 7: Update Contact Info

ERROR: Contact Information
First Name is a required field.

Contact Information

All NPI notifications will be sent to the Primary Contact Person Email provided.

Contact Information (only one required)
This is the Contact Information. Multiple contact information can be entered.

Filter...

Actions	Primary Contact	Name	Credential(s)	Title/Position	Telephone Number	Contact Person Email
	<input checked="" type="checkbox"/>	Nancy Mast	MFT		8314544170	nancy.mast@health.co.santa-cruz.ca.us

Make sure your phone number and email are accurate. NPPES will send a confirmation email to the email listed here. Your phone number may be required if you forget your login information.

This is YOUR information, not someone else's.

After verifying that your contact information is correct, click NEXT to go to the next page.

STEP 8: Error Check Page

Look for any red sections. Correct as needed and then click NEXT at the bottom of the page. This will take you to the Submission page. (If there is an error, the light green areas below will be red.)

INTRODUCTION PROFILE ADDRESS HEALTH INFORMATION EXCHANGE OTHER IDENTIFIERS TAXONOMY CONTACT INFO **7 ERROR CHECK** SUBMISSION

100% application completed

Error Check

Note: Please click the NEXT button to submit your application.

New Please click the VIEW button to review which details of this information will be public after you submit. [VIEW](#)

Click review her to confirm the information in each section is correct.

Step 1: Provider Profile

✓ COMPLETED: Profile
No Errors Found [REVIEW](#)

Step 2: Address

✓ COMPLETED: Address [REVIEW](#)

HOW TO CHANGE YOUR TAXONOMY CODE

STEP 9: Submission Page

1. Read the disclaimer and then click the checkbox at the bottom of the page to certify that you are the person who updated this information.

Submission Certification

After reading the terms and conditions listed below, check the box at the bottom of this page then click "Submit" to submit your application.

* Indicates Required fields.

- I have read the contents of the application and the information contained herein is true, correct and complete. If I become aware that any information in this application is not true, correct, or complete, I agree to notify the [NPI Enumerator](#) of this fact immediately.
- I authorize the [NPI Enumerator](#) to verify the information contained herein. I agree to keep the NPPES updated with any changes to data listed on this application form within 30 days of the effective date of the change.
- I have read and understand the [Privacy Act Statement](#).
- I have read and understand the **Penalties for Falsifying Information** on the [NPI Application / Update Form](#) as stated in this application. I am aware that falsifying information will result in fines and/or imprisonment.

Penalties for Falsifying Information:

18 U.S.C. 1001 authorizes criminal penalties against an individual who in any matter within the jurisdiction of any department or agency of the United States knowingly or willfully falsifies, omits, conceals or substitutes information or documents, or who in any matter within the jurisdiction of any department or agency of the United States or device a material fact, or makes any false, fictitious or fraudulent statements or representations, or makes any false, fictitious or fraudulent statements or entries, or who causes to be prepared, presented or made to contain any false, fictitious or fraudulent statement or entry. Individual offenders are subject to fines up to \$500,000, or five years imprisonment, or both, and organizations are subject to fines of up to \$500,000.

18 U.S.C. 3571(d) also authorizes a fine of not more than double the amount authorized by the offender if it is greater than the amount specifically authorized by the sentencing statute.

certify that this form is being completed by, or on behalf of, a health care provider as defined at [45 CFR § 160.103](#).

2. Click the blue SUBMIT, to go to the Confirmation page.

STEP 10: Confirmation Page

You may print a copy of this page for your records, or at least note the tracking number. NPPES will also send an email confirming your update(s).

Submission Confirmation

Thank you. Your application will be processed. Your Tracking number

You have successfully submitted your Change Request to the NPI application.

An Email confirmation has been sent to the contact person(s) listed on this application. Please be sure to check the "junk" folder.

If you have any questions regarding this application or if a designated contact person doesn't receive the provider's NPI via email within 15 working days, please refer to the [FAQ Menu](#).

If the submitted NPI application contains no errors or additional verifications, the provider's NPI will be updated within the next 24 hours. If additional verification is required, processing may take up to 30 days.

Provider Name:
Contact Person:
Primary Practice: Santa Cruz County Behavioral Health, 1400 Emeline Ave Bldg K, Santa Cruz CA 95060-1976, US
SSN: XXX-XX-
Date Submitted:
Contact Email: nancy.mast@health.co.santa-cruz.ca.us

To print this page for your reference, click:

HOW TO CHANGE YOUR TAXONOMY CODE

APPENDIX 1: CalAIM Implementation and Taxonomy codes

CalAIM implementation (state regulation) requires updating and maintaining practitioner credentials so that they are accurate.

On the state side, the California DHCS (Department of Health Care Services) uses NPPES to verify active NPI numbers and taxonomy. The information found on NPPES (taxonomy, license) is self-reported (updated and maintained by the provider) and is critical for assigning discipline and category (MHRS, LMFT, CADC, etc...) for coverage in County systems.

The importance of this data accuracy is multi-fold. Accurate credentials are required to identify and confirm practitioners' training and status. Practitioner disciplines are used within the County Avatar system to populate the service choices available to practitioners (what service codes you can use). Also, practitioner taxonomy is the basis for billing rate and DHCS claim approval (how we get paid).

Of particular concern is DHCS' split of the 101Y taxonomy. 101Y comprises a range of practitioners generally representing a high level of training and education. DHCS has separated out 101YA (breaking from the planned use of only the first 4 characters of the taxonomy code) into a different discipline, AOD counselors, rather than the related discipline LPCC (Licensed Professional Clinical Counselors). There is a specific rate difference and service code availability between these 2 disciplines. The descriptions for the 101Y range overlap and can easily be interchanged. It is vital that we are able to accurately report practitioner taxonomy in the Avatar system so that the full range of appropriate service codes are available to practitioners.

APPENDIX 2: Common Taxonomy codes for BH Providers

This list is not exclusive. If you find another taxonomy code that you think applies, check with the County QI Dept to see if it will work.

PSYCHIATRY	
Description	Number
Addiction Medicine	2084A0401X
Addiction Psychiatry	2084P0802X
Forensic Psychiatry	2084F0202X
Geriatric Psychiatry	2084P0805X
Psychiatry	2084P0800X
DO/Family Medicine	207Q00000X

NURSE PRACTITIONER, RN, MA	
Description	Number
Registered Nurse	163W00000X
Addiction Reg Nurse	163WA0400X
Lic. Vocational Nurse	164X00000X
Lic. Psychiatric Tech	1647G00000X
Psychiatric MH Nurse	163WP0808X
Nurse Practitioner	363L00000X

HOW TO CHANGE YOUR TAXONOMY CODE

		Medical Assistant - Certified	101Y99993L
--	--	-------------------------------	------------

OTHER LICENSED CLINICAL STAFF		
Description	Number	Definition
Marriage and Family Therapist	106H00000X	Use for LMFT and AMFT
Clinical Social Worker	1041C0700X	Use for ASW and LCSW
Social Worker	104100000X	Use for ASW and LCSW
Professional Clinical Counselor	101YP2500X	Use for APCC and LPCC
Psychologist	103T00000X	
Addiction Psychologist	103TA0400X	
Clinical Psychologist	103TC0700X	
Counseling Psychologist	103TC1900X	
Occupational Therapist	225XM0800X	

COUNSELOR CODES		
Type of Counselor	Preferred Taxonomy Code	Also Acceptable as the Taxonomy Code (but not preferred)*
CADC (SUD Counselor)	101YA0400X - Addiction (Substance Use Disorder) Counselor	171M00000X - Case Manager/Care Coordinator
Other SUD counselors (e.g. SUDRC, RATC)	171M00000X - Case Manager/Care Coordinator	101YA0400X - Addiction (Substance Use Disorder) Counselor
Unlicensed MH counselors who do not have an MHRS (not for SUD counselors)	172V00000X (Other Service Providers - Community Health Worker)	172V00000X (Other Service Providers - Community Health Worker)
MHRS	171M00000X - Case Manager/Care Coordinator	171M00000X - Case Manager/Care Coordinator
Certified Peer Specialists	175T00000X (Peer Specialist) (Must have certificate)	175T00000X (Peer Specialist) (Must have certificate)
	Note: Do not use 101Y00000X – Counselor, or 101Y0800X which are reserved for certain masters level licenses.	*If the clinician already has a taxonomy code in this column, you do not have to change it, but if this is a new code, use the code in the Preferred Taxonomy Code column.

HOW TO CHANGE YOUR TAXONOMY CODE

APPENDIX 3: About NPI Numbers and Taxonomy Codes

The NPI (National Provider Identifier) number and its associated Taxonomy Code are required for all users who are practitioners. In addition, the Taxonomy code must accurately represent the clinician's license or registration. CalAIM requires us to make sure the Taxonomy code is accurate.

A taxonomy code is a unique 10-character code that designates your classification and specialization. You will use this code when applying for an NPI number.

As practitioners move through their careers, taxonomy codes might change. For example, a user might have a "counselor" taxonomy code initially. The user then goes to school and becomes an associate, at which point the NPI registration will need to be updated to reflect the new license.

This link provides more information about NPI numbers. <https://www.cms.gov/Regulations-and-Guidance/Administrative-Simplification/NationalProvidentStand>

This link provides more information about taxonomy codes. <https://www.cms.gov/Medicare/Provider-Enrollment-and-Certification/MedicareProviderSupEnroll/Taxonomy>

NPPES
National Plan & Provider Enumeration System

SEARCH NPI REGISTER

Registered User Sign In

Log in to view/update your National Provider Identifier (NPI) record.

User ID ⓘ
I&A User ID, used to access NPPES, EHR & PECOS

Password


SIGN IN

FORGOT USER ID or PASSWORD?

*If your User ID is associated with a large number of providers, you could experience a small delay while the application retrieves all NPPES profile related information


Create or Manage an Account

You need an Identity & Access Management System (I&A) account to lo



Individual Providers or Users Working on Behalf of a Provider or Organization

If you don't have an I&A account, or you need to update your existing I account, then select the "CREATE or MANAGE AN ACCOUNT" button below to go to I&A.



After successfully creating your I&A account, return to NPPES and use your I&A User ID and Password to log in. This is where you can create a maintain NPI data that you are associated with.

CREATE or MANAGE AN ACCOUNT

To learn more about Multi-Factor Authentication (MFA) [click here](#)

To learn more about how to apply for an NPI [click here](#)

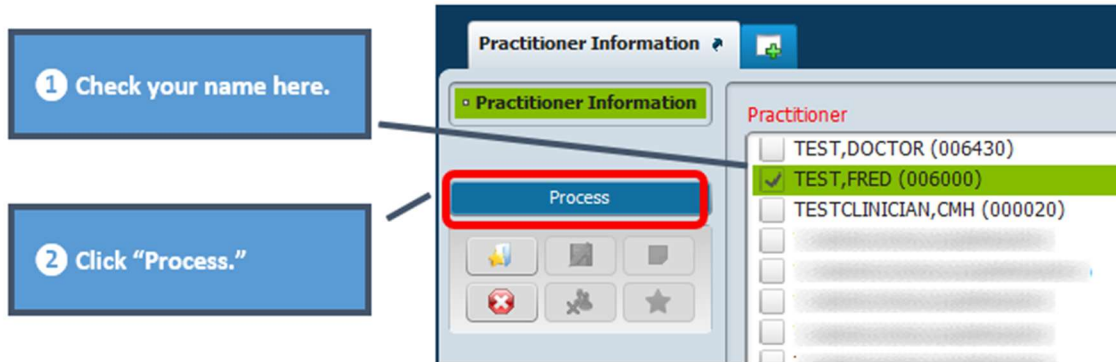
HOW TO CHANGE YOUR TAXONOMY CODE

xAPPENDIX 4: How to Check Your Taxonomy Code in Avatar

Avatar must have the correct Taxonomy code. It must match the NPPES primary Taxonomy code.

Behind the scenes, the IT department is working on these updates, comparing what is in Avatar to what is on the NPPES website, but if you want to check for yourself, here's how to do that.

Use the **Practitioner Information report** to see what Taxonomy Code is in Avatar, and whether or not it matches NPPES.



3 Is the highlighted information (below) correct? ↓

Staff ID	Staff Name	Practitioner Category	Discipline	Category	Taxonomy	Practitioner Credentials	NPI
001885	JENNIFER,JASON	17	LMFT	07	MFT	18 Lic Marriage and Fam Ther (L	106H00000X 25 LMFT 1234567890

If NPPES is correct, but the Taxonomy code in Avatar does not match, send a message to askqi@santacruzcounty.us to request an update.