How to use the Provider Directory Portal

REGIONAL CENTERS

Created by the Department of Developmental Services for Regional Centers

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Department of Developmental Services

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Module 1 – Logging in and Reviewing Dashboards

This module will walk you through how to access and view the dashboard relevant to your Regional Center.

1:1 Viewing Dashboards

1. Navigate to this URL: https://caddstest.servicenowservices.com/spd and you will be automatically logged in with your DDS email, Single Sign On (SSO), login credentials.
    a. When you log in to the Provider Directory for the very first time, you will land on the Dashboards Overview page (Figure 1). In future logins, you will land on the last dashboard you visited.
    b. Click on the "SPD - Regional Center Dashboard."

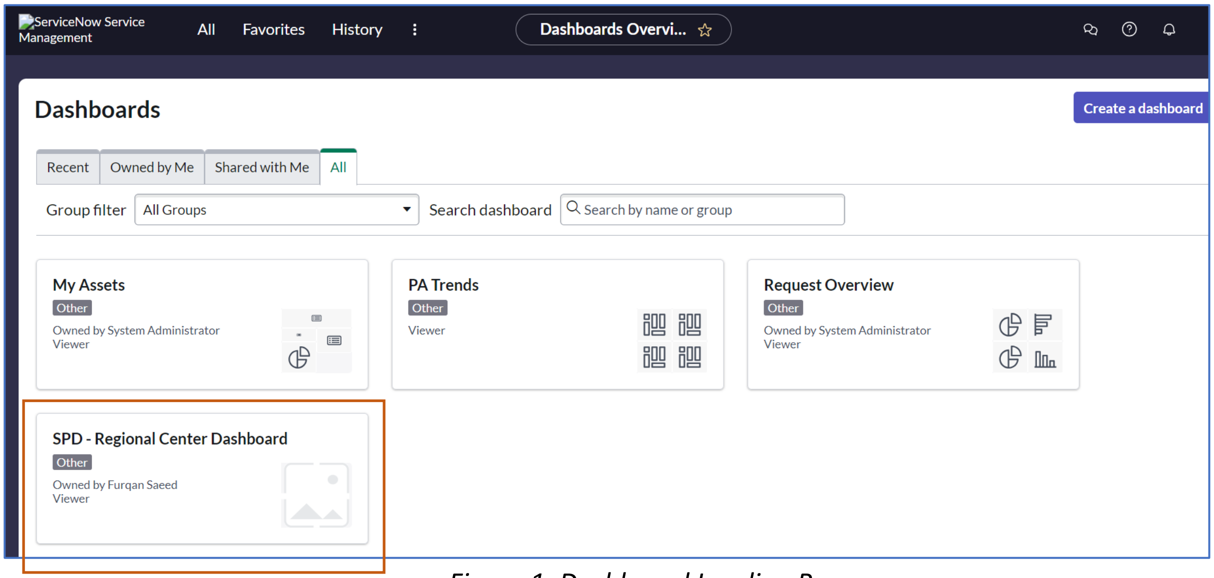

Figure 1: Dashboard Landing Page

2. Once in the RC dashboard (Figure 2), you will see:
    - Minor or insignificant requests by week
    - Major requests by week
    - Major requests approved and rejected
    - Major requests raised per regional center (all Major requests relevant only to Regional Center that the RC user is assigned to)
    - Pending Approvals (these approvals are only related to the individual who logs in)
    - Approved or Rejected this week by RC Response

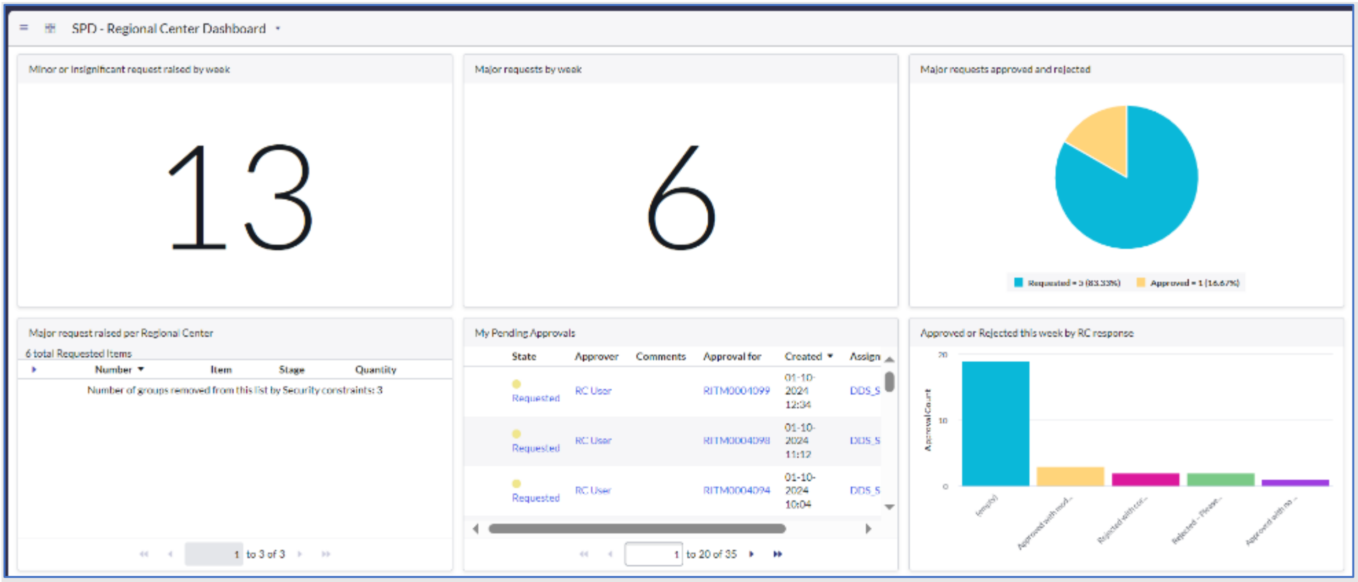

Figure 2: RC Dashboard

3. You can navigate to the RC dashboard from any other window in the Provider Directory by clicking on “All” in the top navigation panel, clicking on “RC Application Window” in the drop-down menu, and then clicking on “SPD – Regional Center Dashboard” (Figure 3).

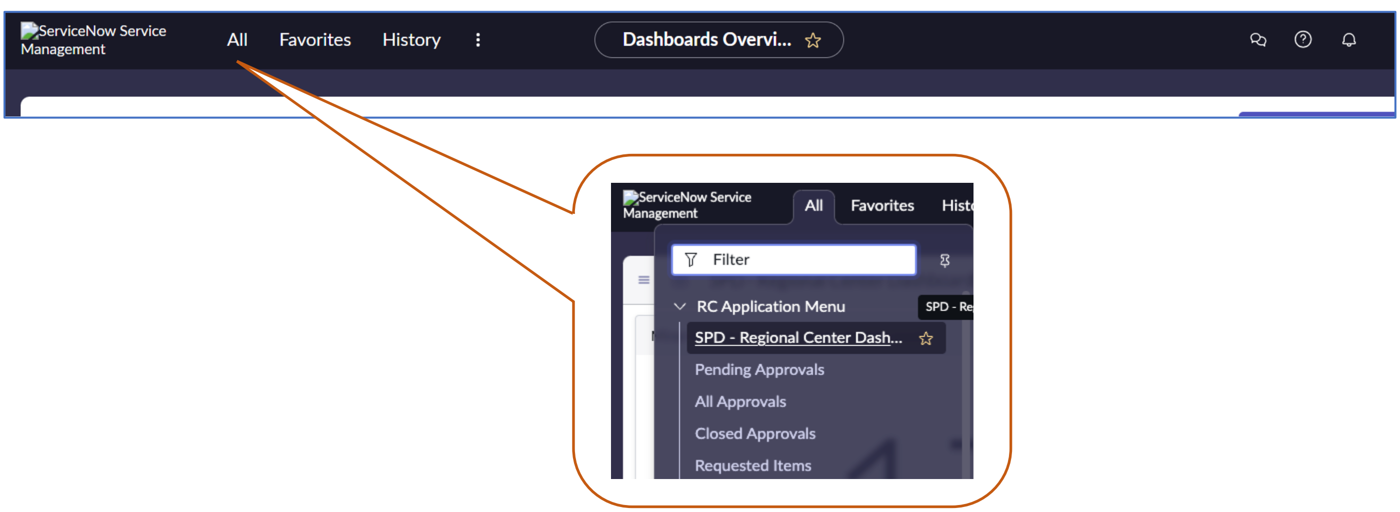

Figure 3: Navigating to the SPD – Regional Center Dashboard

Module 2 - Review and Accept or Reject a Change Request

This module will walk you through how to access, review, accept, or reject a change request from a Vendor. It will also cover how to make comments and add attachments to the requests and how to view the attachments and comments from the Service Provider.

2:1 Viewing Change Requests

1. Once you are logged into the Provider Directory, find “Pending Approvals” under the All in the navigation pane and select it.
2. This will bring up the open change requests screen (Figure 4)
3. Select the RITM from the “Approval for” column to access a specific change request.

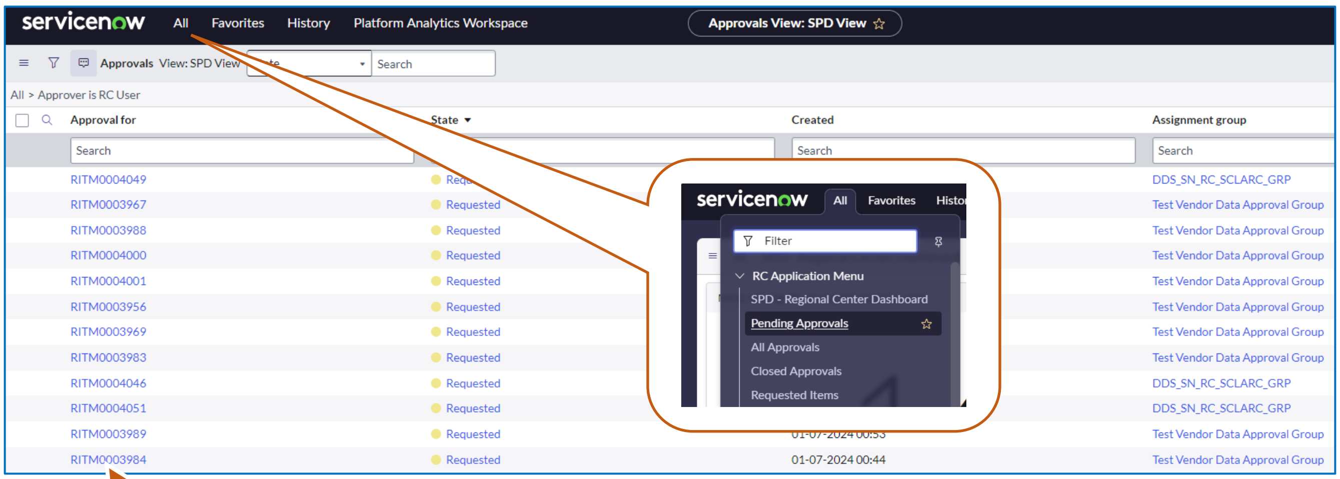

Figure 14: Open Change Requests Screen

2:2 Reviewing Change Requests

1. Once you click on the RITM number to open a specific request, you will see the requested item information screen (Figure 5). The screen includes the original and change (indicated by the asterisk "*" and word "change" in the title of the field) data fields. The change data fields are pre-populated and will differ from the original data fields only when the Service Provider made a change to an editable field.

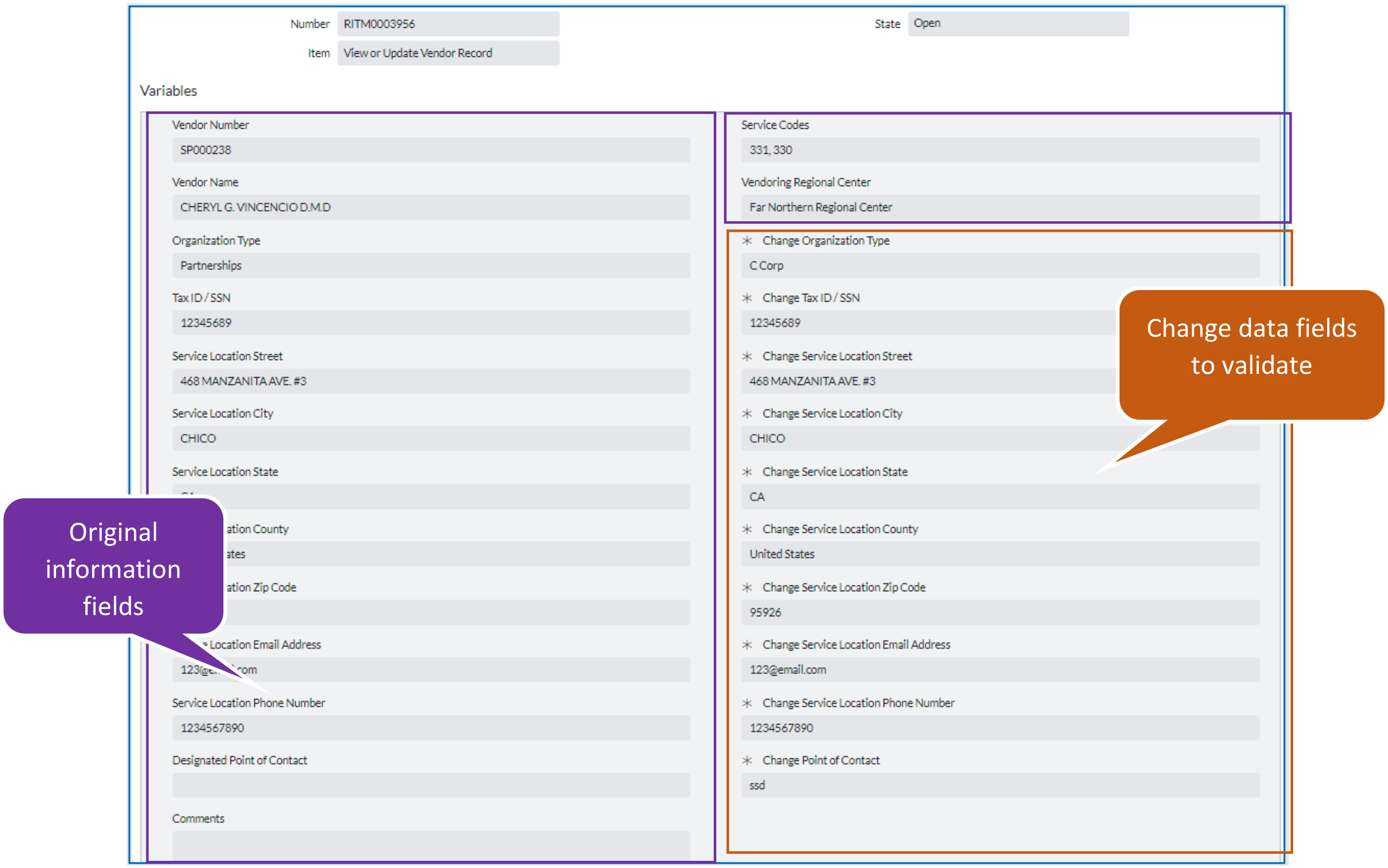

Figure 5: Requested Item Information Screen (Top of the Screen)

2. A quick way to review which field(s) changed is to view the history and timeline of the request that is right below the information fields (Figure 6).

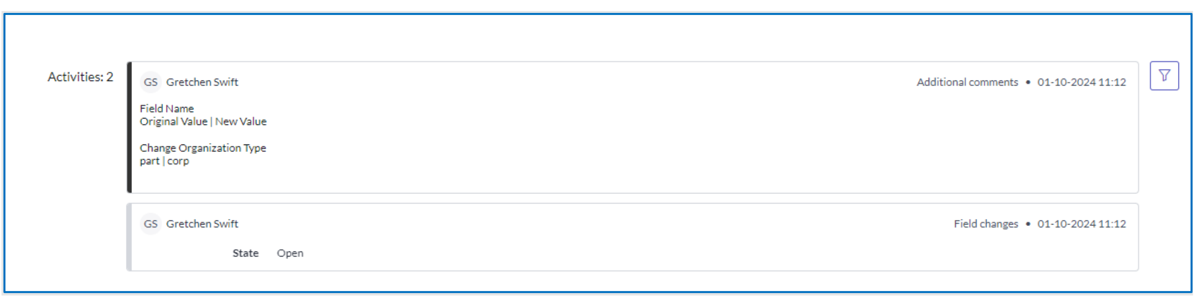

Figure 6: Request History and Timeline ***(Middle of the Requested Item Information Screen)***

2:3 Insignificant vs. Major Change Requests

A Service Provider user can submit with no changes or make changes and then submit. Changes can be **Insignificant** or **Major**. Insignificant changes are automatically approved when submitted and include edits to any or all of the following fields:

- Service Location Phone Number
- Service Location Email Address
- Designated Point of Contact

Major changes are those that include changes to any or all of the below fields and need to be reviewed by the Regional Center:

- Federal Tax ID
- Organization Type
- Service Location Street
- Service Location City
- Service Location State
- Service Location County
- Service Location Zip Code

If a Service Provider makes an Insignificant change and submits, the Provider Directory will send an email confirmation to the SP, automatically approving the change. No action is needed from the Regional Center.

2:4 Approving or Rejecting a Request

1. Once you review the change data fields, you have the choice to approve or reject the request.
2. At the very bottom of the requested item information screen (Figure 5), there is a section with two tabs. Click on the Approvers tab (Figure 7).
3. Locate the row that lists your name in the "Approver" column and click the "Requested" link (to the left) in that same row. Note: If you click any other approver name outside of your own, you will be unable to take an action.

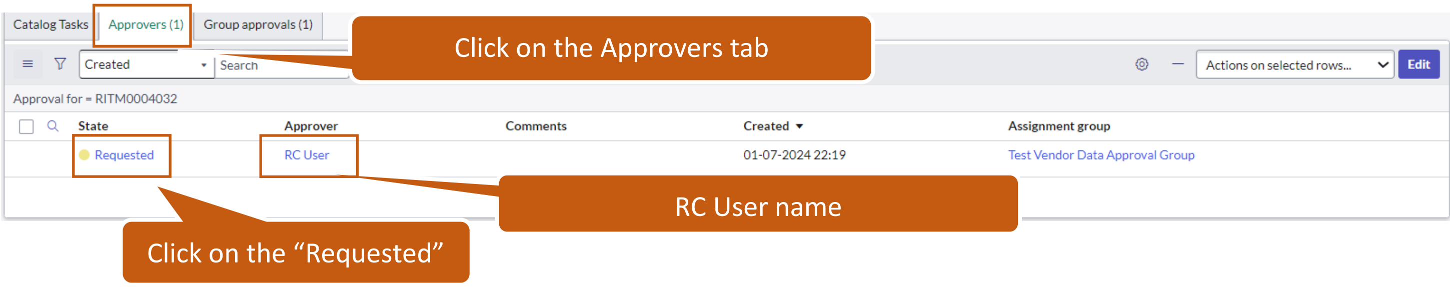

Figure 7: Approvers tab (Bottom of the Requested Item Information Screen)

4. Once you select the "Requested" link, you will be taken to the Approval screen (Figure 8). It contains:
   - RC Response dropdown
   - Action buttons (Approve and Reject)
   - Comments section
   - Attachment button

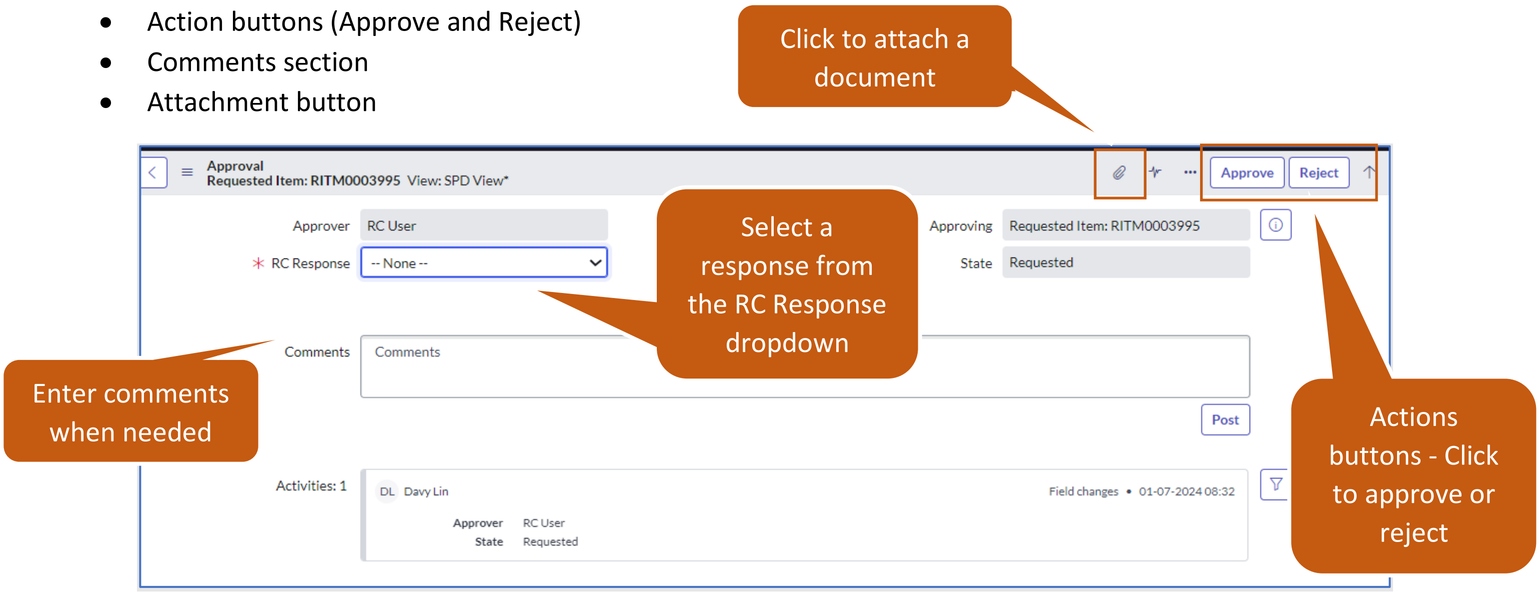

Figure 8: Approval screen

5. Using the RC Response dropdown, select one of the four appropriate fields:
   - Approved with no modifications
   - Approved with modifications
   - Rejected with corrections needed
   - Rejected – please contact the Regional Center

6. Then click on the appropriate button: Approve or Reject. Be sure to add comments if you are rejecting, as they are required with a rejection.

2:5 RC Response Scenarios

The following is a suggested use and scenario for each RC response option available in the approval screen (Figure 8).

RC response option	**Suggested use**
Approved with no modifications	Approve major change as submitted
Approved with modifications	Approve major change as submitted **and** request information from the SP needed to support a business process
Rejected with corrections needed	Reject major change as submitted **and** prescribe changes to be made
Rejected – please contact the Regional Center	Reject major change

2:6 Adding Comments to a Request

1. To make a comment, navigate to the Approval screen (Figure8).
2. Once you are on the Approval screen (Figure 8), make a comment in the Comments field and click the “Post” button. This comment will now show up at the bottom of the Approval screen (Figure 9). When the Service Provider makes a comment, you can also see yours and their comments in the request history and timeline below the information fields (Figure 6). You can make as many comments as you like.
    a. Notes: 1) You are not required to add a comment to the request; 2) You can make comments without having to make an approval or rejection decision and 3) If the SP cancels their request, all comments and attachments will be lost. They will start the approval process over with a new RITM.

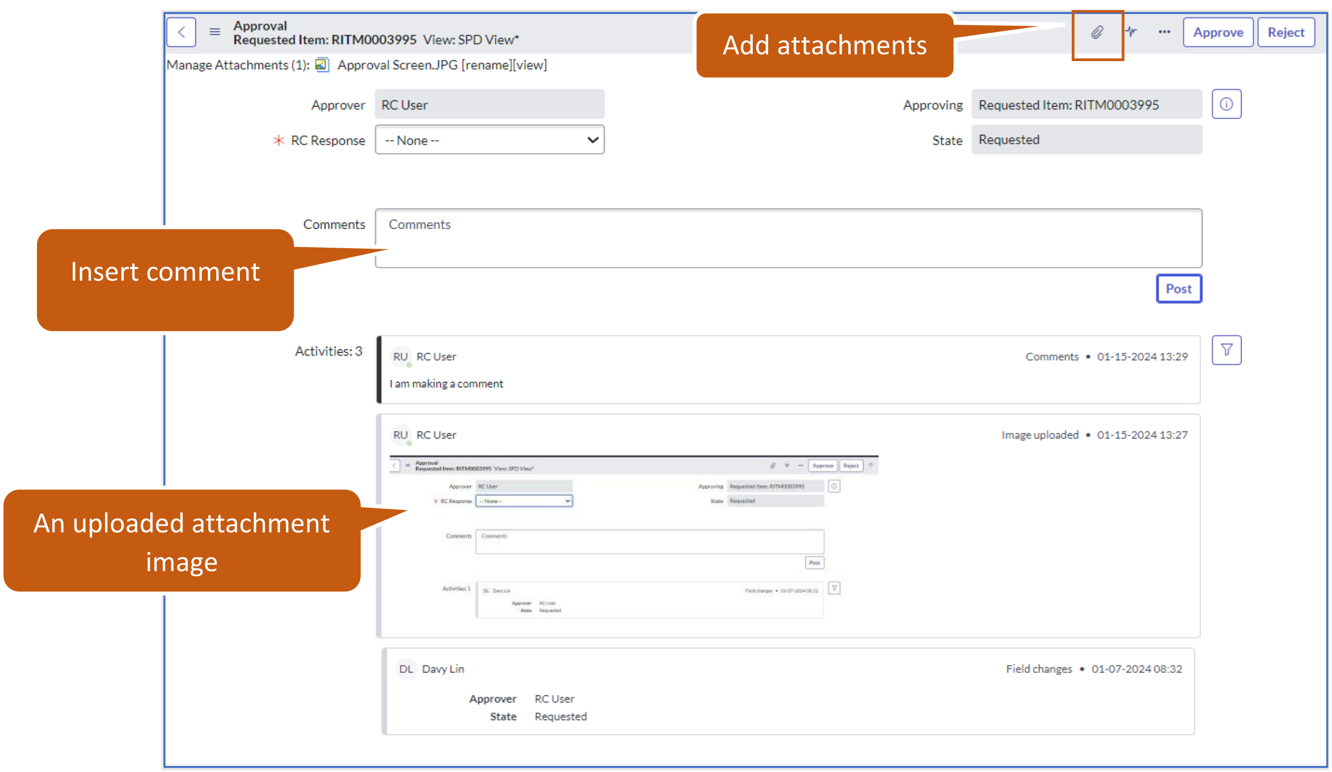

Figure 9: Request Comments and Attachments

2:7 Adding Attachments to Requests

1. To add an attachment, navigate to the Approval screen (Figure 8) by clicking on the Requested link in the Approvers tab (Figure 7).
2. Once you are on the Approval screen, click on the paper clip icon and choose a file to attach. The attachment will be listed in the activities section at the bottom of the screen. When the Service Provider adds an attachment, you can also see yours and their attachments in the request history below the information fields (Figure 6). You can add as many attachments as you like. Note: if the SP cancels their request, all comments and attachments will be lost. They will start the approval process over with a new RITM.
3. Note: you are not required to add a screenshot to the request.

2:8 Customize / Export Tables

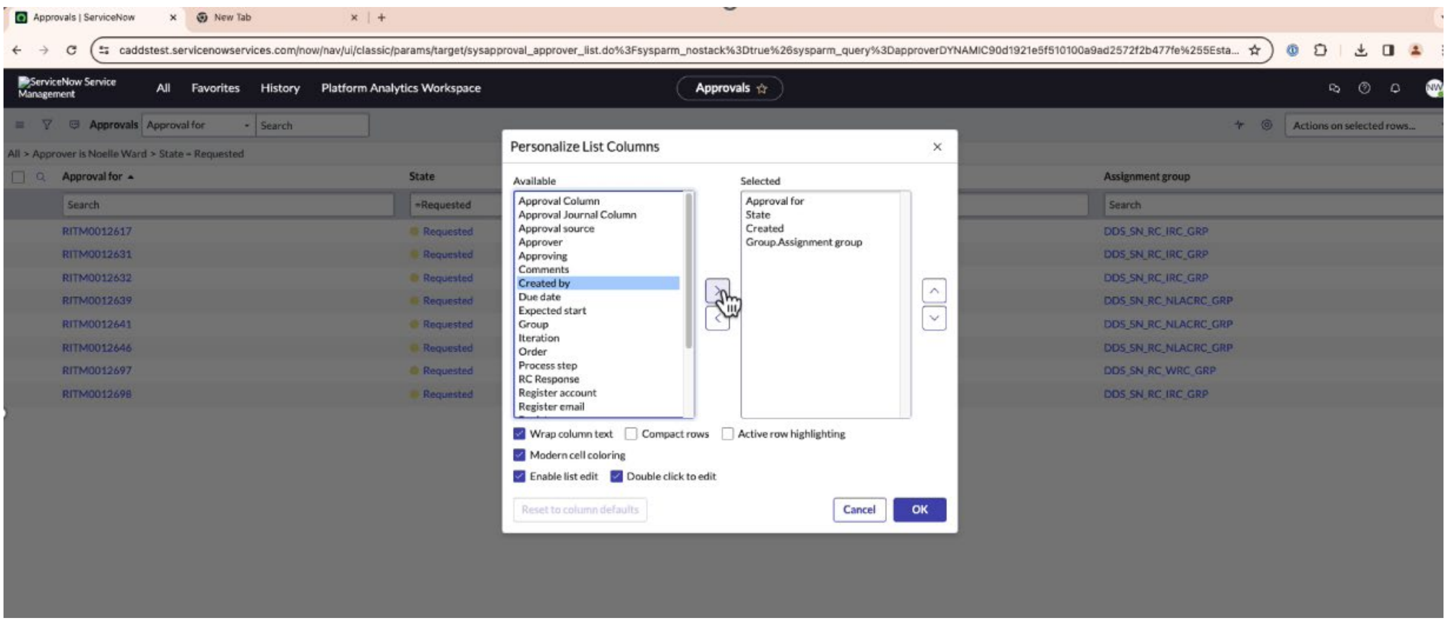

Figure 10: Customize Tables

1. To customize a table in the provider directory, navigate to the setting wheel at the top right corner of your screen. When you click on it, you'll get two boxes, Selected and Available.
2. Selected represents the columns you see on your table in the original view and Available provides additional content that you could add to your view. You can make additional edits, including returning to the default by clicking Reset to Column Defaults.

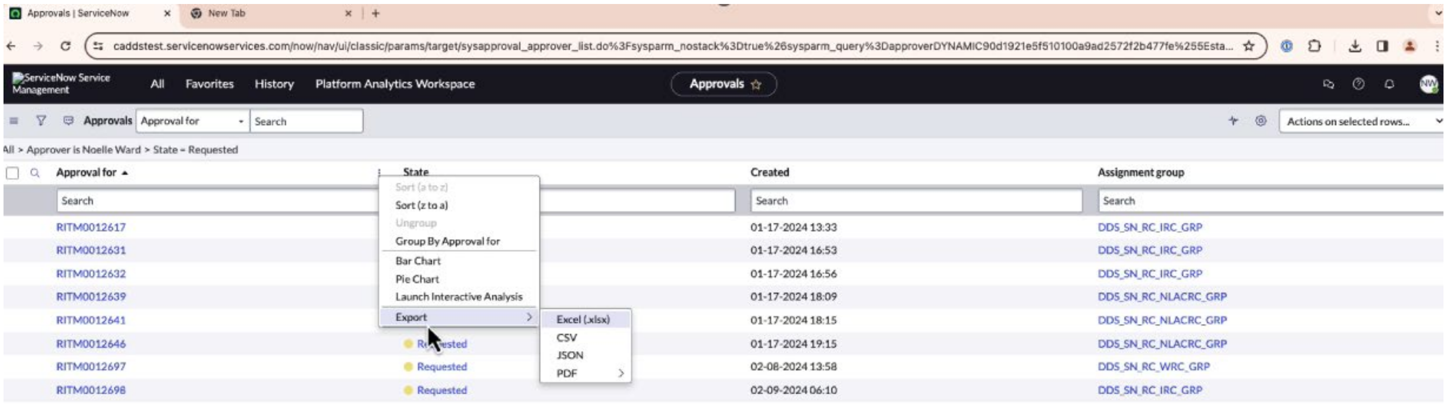

Figure 11: Exporting Table

3. You can export your table view contents. To do so, go to approval for, click the three dots and you will get a dialogue box. You can choose Excel or CSV. It starts in export progress and when it's complete, you can click download and it will be downloaded to your machine.

QUESTIONS?

Email: ProviderDirectory@dds.ca.gov