

# How to use the Provider Directory Portal

## SERVICE PROVIDERS

Created by the Department of Developmental  
Services for Service Providers

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# SERVICE PROVIDERS

**Disclaimer:** All screenshots contain test data and do not reflect actual provider data.

## **Module 1 - Registration and Log In**

This module will walk you through how to register, log in, and gain access to the application home page.



The Provider Directory is powered by Service Now. Service Now recommends Chrome and Safari browsers. TIP: If you are having issues accessing or viewing the Provider Directory in your browser, try clearing your browsing data (this clears your history, cookies, cache, etc.).

### 1:1 Registration and Log In

#### 1. Email Invitation:

- You will receive an email invitation from [caddspod@servicenowservices.com](mailto:caddspod@servicenowservices.com) to register with the subject "Registration Request for the DDS Vendor Portal" (Figure 1):
- It will contain the Vendor number that the user is associated with and an email address that was used to register.

A vendor you are affiliated with has been imported into the DDS Vendor portal. The vendor details are below:

- Vendor Name: Company Inc.
- Vendor Number: H04250
- Vendor Contact email: vendor@email.com

Please click on the link to register and validate your information.

[Self-Registration](#)

Thank you.



Figure 1: Registration Request Email

2. Access the Registration Form and Register:

- Click on the Self Registration Link provided in the email and you will be taken to the Self Registration Form (Figure 2).
- Once in the Self Registration form, enter the email and vendor number provided in the invitation email.
- Review the Privacy Policy and Terms and Conditions and check the radio button to agree.
- Click on “Sign Up” at the bottom of the page once you have completed all of the fields in the form.

The screenshot shows the 'Vendor Self Registration form' interface. At the top, it says 'Vendor Self Registration form'. Below that, instructions state: 'To register, please provide the following information and click Sign Up. If you have multiple Vendor numbers, please insert only one.' The form contains two main input fields: an 'Email' field and a 'Vendor Number' field. The 'Email' field has a callout bubble pointing to it that says 'Enter the email provided in the invitation'. The 'Vendor Number' field has a callout bubble pointing to it that says 'Enter the Vendor Number provided in the invitation'. Below the 'Vendor Number' field, there is a checkbox labeled 'I agree to the Privacy Policy and Terms and Conditions' with a callout bubble pointing to it that says 'Review and agree to the Privacy Policy and Terms'. At the bottom of the form is a blue 'Sign Up' button.

Figure 2: Vendor Self Registration Form

The screenshot shows an email confirmation message. It starts with 'Thank you for filling out the DDS Vendor portal registration form. Please use the link below to set up your account password:'. Below this is a blue hyperlink labeled 'Password Set Up'. The message continues with 'Thank you.' and ends with the DDS logo and the text 'Department of Developmental Services'.

Figure 3: Registration Confirmation and Set Up Password Link Email

### 3. Set up a New Password

- A second email will be received (Figure 3) once steps 1 and 2 are successful. Click on the link provided in the second confirmation email titled “Password Set Up.”
- You will be taken to the password set up screen (Figure 4). Once there, create a password that meets DDS requirements.

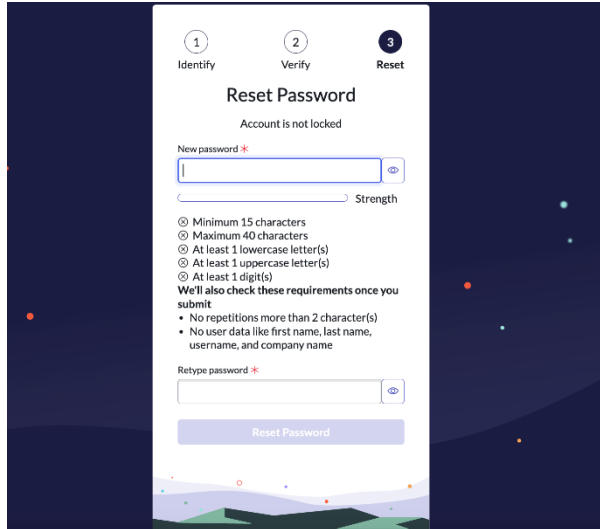


Figure 4: Password Set Up Screen

### 4. Log in with your new password:

- After your new password is set up, you will be directed to the Provider Directory Login screen (Figure 5)
- Enter your email and new password and click “Log in.”

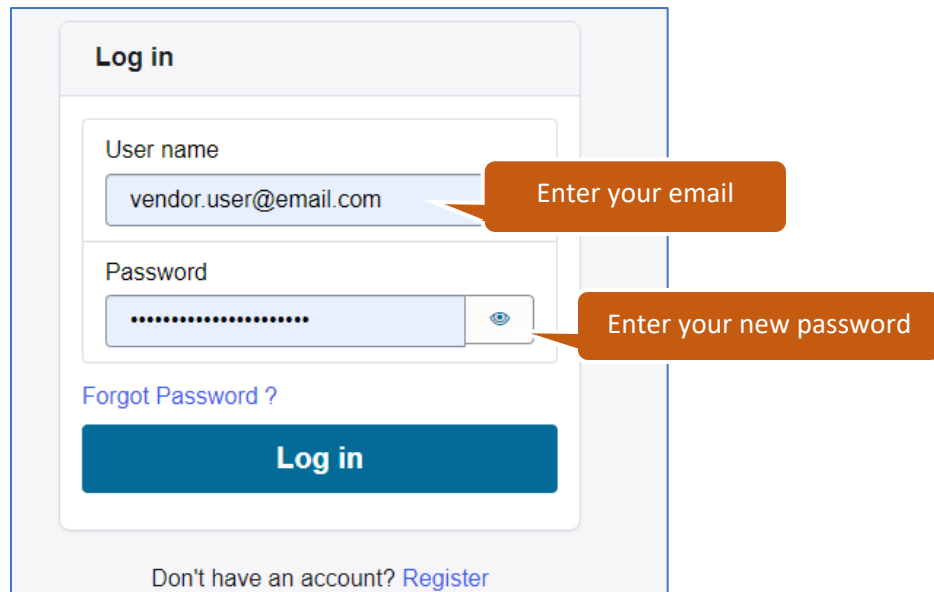


Figure 5: Provider Directory Login Screen

## Module 2 - Viewing, Reviewing, and Submitting Confirmations

This module will walk you through how to log in to the Provider Directory and view open, submitted, pending, and closed confirmations. It will also cover how to review, edit, and submit a confirmation to a regional center for review.

### 2:1 Accessing Confirmations



**Confirmations** are vendor records that contain information about the vendor relevant to DDS. To keep this data relevant and up to date, DDS has created a process that allows service providers to edit, verify, and confirm it. When a service provider completes their record's verification process, this data is passed back into the Provider Directory, keeping information about the service provider current.

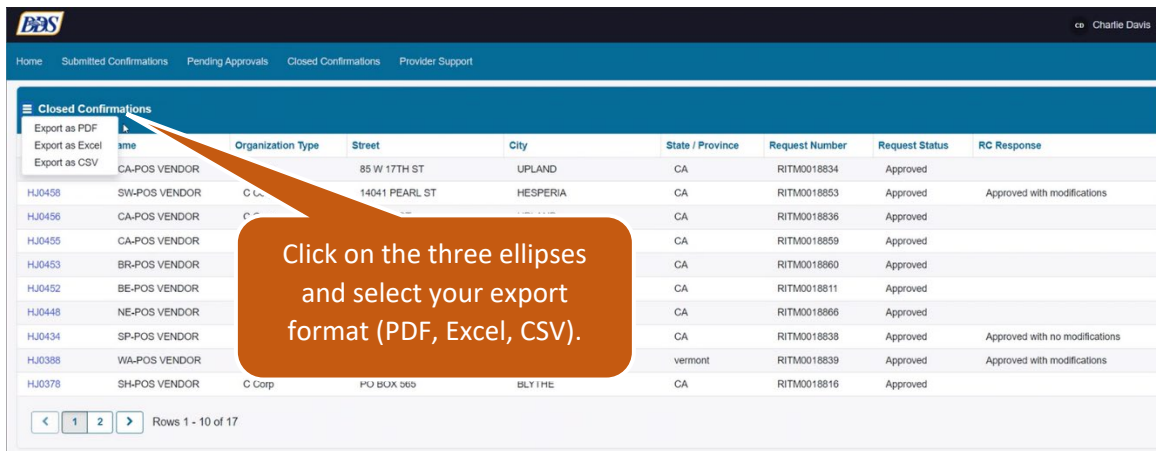
1. Access the Provider Directory login page and log in:
  - Use the link provided in the invitation email or copy and paste <https://caddsprod.servicenowservices.com/spd> into your browser.
  - Log in with your email and password. You will be directed to the Provider Directory home page (Figure 6).
2. Navigation of the Provider Directory Home Page:
  - Once on the Provider Directory Home page, you will see the following elements:
    - Navigation pane at the top of the page including links to submitted confirmations, pending approvals, and closed confirmations
    - Table of all confirmations that need to be submitted with information about each (Vendor Number, Vendor Name, etc.)
3. View Confirmations:
  - You can view not started confirmations on the Home page.
  - You can view Submitted Confirmations, Pending Approvals, or Closed confirmations by clicking on the relevant navigation links in the navigation pane.

Vendor Number	Vendor Name	Organization Type	Service Location Name	Service Location Street	Service Location City	Service Location State	Request Number	Request Status	RC Response
H04727	PATHPOINT	Limited Liability Company (LLC)	PATHPOINT Location	5510 BALBOA BLVD STE 100	NORTHridge	CA		Not Started	
H05610	TRANSITIONAL SERVICE	Limited Liability Company (LLC)	TRANSITIONAL SERVICE Location	905 OHIO STREET	VALLEJO	CA		Not Started	
H05176	ELLIOTT'S HOME	City Company	ELLIOTT'S HOME Location	2324 BEN HUR COURT	SAN JOSE	CA		Not Started	
H00822	OXFORD F			280 ATLANTIC AVE	LONG BEACH	CA		Not Started	
H00528	SIM VALLI HLTH			2975 N SYCAMORE DR	SIM VALLEY	CA		Not Started	
H01166	SALEM SC			6921 EDISON AVE	CHINO	CA		Not Started	
H02511	LUNDY FA HOME			PO BOX 91970	PASADENA	CA		Not Started	
H06284	EMPIRE G			101 SOUTH "G" STREET	EMPIRE	CA		Not Started	
H12463	TOOLWORKS INC.	Joint Proprietorship	TOOLWORKS INC. Location	22 BATTERY STREET #300	SAN FRANCISCO	CA		Not Started	
H01681	NATIVIDAD MEDICAL CENTER	C Corp	NATIVIDAD MEDICAL CENTER	1330 NATIVIDAD ROAD	SALINAS	CA		Not Started	

Figure 6: Provider Directory Home Page

#### 4. Export Confirmations:

- Select “Closed Confirmations” from the navigation bar.
- Click on the three ellipses, or hamburger, in the top left corner in the Closed Confirmations table.
- Select your desired format to export closed confirmations.
- The exported report will appear in your downloaded files, or wherever your downloads are stored.



Name	Organization Type	Street	City	State / Province	Request Number	Request Status	RC Response
CA-POS VENDOR		85 W 17TH ST	UPLAND	CA	RIITM0018834	Approved	
HJ0458	SW-POS VENDOR	14041 PEARL ST	HESPERIA	CA	RIITM0018853	Approved	Approved with modifications
HJ0456	CA-POS VENDOR			CA	RIITM0018836	Approved	
HJ0455	CA-POS VENDOR			CA	RIITM0018859	Approved	
HJ0453	BR-POS VENDOR			CA	RIITM0018860	Approved	
HJ0452	BE-POS VENDOR			CA	RIITM0018811	Approved	
HJ0448	NE-POS VENDOR			CA	RIITM0018866	Approved	
HJ0434	SP-POS VENDOR			CA	RIITM0018838	Approved	Approved with no modifications
HJ0388	WA-POS VENDOR			vermont	RIITM0018839	Approved	Approved with modifications
HJ0378	SH-POS VENDOR	PO BOX 969	BLYTHE	CA	RIITM0018816	Approved	

Figure 6.1: Export Confirmations

## 2:2 Confirmation Types and Statuses



Confirmations are divided into the following categories in the Provider Directory:

- **Not Started** confirmations are yet to be confirmed or edited by the service provider.
- **Submitted** confirmations are all those that have been submitted by the service provider.
- **Pending** confirmations have been submitted, but not approved or rejected by the regional center.
- **Closed** confirmations have been submitted by the service provider and approved or rejected by the regional center. These cannot be resubmitted.

Additionally, a confirmation, once submitted, can have the following statuses:

- **Pending Approval** – submitted by the service provider, but not yet reviewed by the regional center
- **Approved** – submitted by the service provider and closed
- **Rejected – Resubmit** -- submitted by the service provider and rejected by the regional center because a modification and resubmission of the confirmation is required
- **Rejected – Closed** are considered closed and cannot be resubmitted

Below is a table that shows the status flow:

Vendor record status before action is taken	Action taken	Vendor record after action is taken
Not Started	A. Submitted with no changes, or with Insignificant changes	A. Approved
	B. Submitted Major changes	B. Pending Approval
Pending Approval	A. Regional center approved the request	A. Approved
	B. Regional center rejected the request to resubmit	B. Rejected - Resubmit
	C. Regional center rejected the request, can't resubmit	C. Rejected - Closed
	D. Vendor cancelled the request	D. Not Started
Rejected - Resubmit	A. Submitted Major changes	A. Pending Approval
	B. Submitted with no changes, or Insignificant changes	B. Approved



## 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, automatically approving the change and this record will move from not started confirmations to closed confirmations with an Approved status. You can find the record by navigating to Closed Confirmations table using the navigation pane (see Figure 6).

If a service provider makes a Major change, the Provider Directory will send an email notification with a confirmation of the Major change request. An email notification will also be sent when the regional center accepts or rejects the major change request or makes a comment on the request.

## 2:4 Review and Submit with No Edits

1. Access the Provider Directory Home page (Figure 6).
2. Access a confirmation that has not been started from the home page (look for “Not Started” in the “Request Status” column in the My Vendorizations table):
  - Click on the associated Vendor Number in the first column. This will take you to a confirmation information screen (Figure 7).

Navigation pane

Information fields

Service Location fields

Home Submitted Confirmations Pending Approvals Closed Confirmations Provider Support

H05251

Vendor Number

POWERS GUEST HOME

Parent Vendor Name

Service Codes

Federal Tax ID / SSN

663098910

Vendoring Regional Center

South Central Los Angeles Regional Center

Service Location Point of Contact

Jon Smith

Service Location Name

POWERS GUEST HOME Location

Service Location Street

4641 11TH AVENUE

Service Location City

SACRAMENTO

Service Location State

CA

Service Location County

El Dorado

Service Location ZIP Code

95820

Service Location Email Address

HarborVillage@gmail.com

Service Location Phone Number

111-222-1370

Edit data Submit with no changes

Figure 7: Confirmation Information Screen

3. Review the information provided in the information and service location fields.
4. If edits are needed, please see instructions in 2:5. If the information is accurate and complete (no blank fields), click on “Submit with no changes” button.
5. A pop-up message will appear thanking you for the submission. The Provider Directory will submit the confirmation to the Vendoring regional center and remove this record from the “My Vendorizations” table on

your Home page. You will now see it in the closed or submitted confirmations list (by navigating to either Closed Confirmation or Submitted Confirmations in the Navigation Pane at the top of the screen). The Request Status of the submission will now be switched to “Approved”.

## 2:5 Submit with Edits

1. Access the Provider Directory Home page.
2. Access a confirmation that has not been started from the home page.
3. Navigate to the Confirmation Information screen (Figure 7).
4. If any information is incomplete, a banner at the top of page will appear - “All fields are required. Some fields have issues. Please update d
5. Click on the “Edit data” button and you will be taken to the Update Vendor Record screen (Figure 8).
6. You will see populated editable and non-editable fields. They are distinguishable by their white (editable) or grey (non-editable) background.
7. The editable fields have an asterisk “\*” in their title and are pre-populated with the original data values. Edit, if needed, and be sure all these fields have information (this is required for successful submission).
8. Click “Submit” when completed.
9. A pop-up message will appear thanking you for the submission. Subsequent actions are dependent on type of change.
  - If the change is Insignificant, the Provider Directory approves the submission automatically, sends an email notification confirming the submission, and removes this record from the not Started Confirmations list. You will now see it in the Closed or Submitted Confirmations list (by navigating to either Closed Confirmation or Submitted Confirmations).
  - If the change is Major, you will receive an email notification confirming your submission, and the change request will appear in the Pending Approvals list (by navigating to Pending Approvals using the navigation pane) with a Pending Approval status.

View or Update Vendor Record

Vendor Number: H05251

Vendor Name: POWERS GUEST HOME

Service Location Name: POWERS GUEST HOME Location

Organization Type: Limited Liability Company (LLC)

Tax ID / SSN: 663098910

Service Location Street: 4641 11TH AVENUE

Service Location City: SACRAMENTO

Service Location State: CA

Service Location County: El Dorado

Service Location Zip Code: 95820

Service Location Email Address: HarborVillage@gmail.com

Service Location Phone Number: 111-222-1370

Designated Point of Contact: Jon Smith

Comments:

Parent Vendor Name:

Vendoring Regional Center: South Central Los Angeles Regional Center

Service Codes:

\* Change Organization Type: Limited Liability Company (LLC)

\* Change Tax ID / SSN: 663098910

\* Change Service Location Street: 4641 11TH AVENUE

\* Change Service Location City: SACRAMENTO

\* Change Service Location State: CA

\* Change Service Location County: El Dorado

\* Change Service Location Zip Code: 95820

\* Change Service Location Email Address: HarborVillage@gmail.com

\* Change Service Location Phone Number: 111-222-1370

\* Change Point of Contact: Jon Smith

Submit

Non-editable fields

Editable fields: edit if needed

Submit when form is completed

Figure 8: Update Vendor Record screen

### Module 3 - Tracking a Change Request

This module will walk you through how to view the status of your requests and cancel a pending change request that has been submitted by you.



A **Request Item (RITM) Number** is assigned to each vendor record that is submitted by a service provider. This ID is key to managing change requests and enables regional centers to look up and view the provider's approval request(s).

To locate your RITM, navigate to the "Submitted Confirmations" list view from the navigation pane at the top of your screen and look for your RITM under the "Request Number" column.

#### 3:1 View Submitted Requests

1. Navigate to the Provider Directory Home page (Figure 6).
2. Click on "Submitted Confirmations" using the navigation pane at the top of the page.
3. In the Submitted Confirmations table (Figure 9), you will be able to see the status in the "Request Status" column of each record and a note in the "RC Response" column.

Submitted Confirmations									
Vendor Number	Vendor Name	Organization Type	Service Location Name	Service Location Street	Service Location City	Service Location State	RITM Number	Request Status	RC Response
D27915	CASTILLO, REGINA	C Corp	CASTILLO, REGINA Location	8316 ALBURTIS AVE	WHITTIER	CA	RITM0004120	Approved	
D00203	ARROYO, MICHAEL	C Corp	ARROYO, MICHAEL Location	13625 MAR VISTA AVE #9	WHITTIER	CA	RITM0004119	Rejected - Resubmit	Rejected with corrections needed
DE0421	NEW DAY MONTEBELLO WEIGHT	C Corp	NEW DAY MONTEBELLO WEIGHT Location	511 WASHINGTON BLVD	MONTEBELLO	CA	RITM0004121	Rejected - Closed	Rejected - Please contact the Regional C...
H00244	ACHIEVEMENT HOUSE	C Corp	ACHIEVEMENT HOUSE Location	3003 C ROAD			RITM0004123	Approved	
C01050	ANN BELLES	C Corp	ANN BELLES Location	PO BOX 6157	HUNTINGTON BEACH	CA	RITM0004111	Approved	Approved with no modifications
C01050	ANN BELLES	C Corp	ANN BELLES Location	PO BOX 6157	HUNTINGTON BEACH	CA	RITM0004110	Approved	

Figure 9: Submitted Confirmations Table

4. For further information, you can click on the Vendor Number and you will be directed to the View or Update Vendor Record Screen (Figure 10). This screen will contain:
- Changes to the Vendor Record, including service provider approval or changes submitted
  - Status (state) of the request
  - Timeline with comments and activities related to the request.

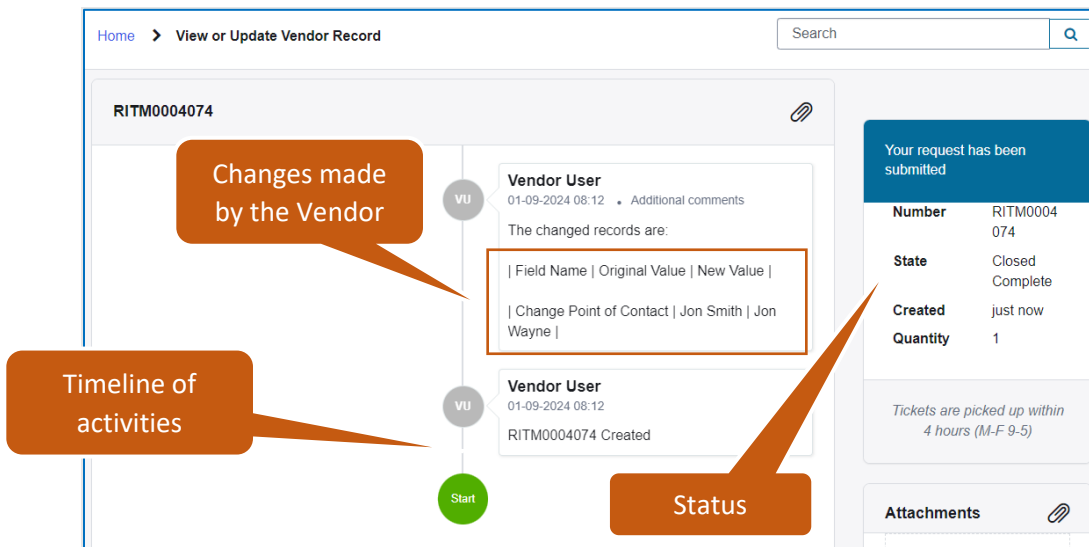


Figure 10: View or Update Vendor Record Screen

### 3:2 Cancelling a Pending Change Request



A request is pending only when the change was Major and the state is "open." Requests cannot be cancelled if they were submitted with no change, or submitted with changes that were Insignificant. **Only pending Major requests in the "Open" state can be canceled.**

1. Navigate to the Provider Directory Home page (Figure 6).
2. Click on the "Pending Approvals" using the navigation pane.
3. Select the pending change request by clicking on the Vendor Number. You will be taken to the View or Update Vendor Record Screen where there will be an option to cancel (Figure 11).
4. Click on the "Cancel Request" button.
5. You will see a pop-up confirmation message indicating the request has been successfully cancelled. The RITM will be closed. You will then be directed to the Home page to resubmit the confirmation. The new submission will create a new RITM.

Home > View or Update Vendor Record

Search

RITM0004072

Type your message here... Send

Click to Cancel Request

Cancel Request

Your request has been submitted

Number	RITM0004072
State	Open
Created	35m ago
Quantity	1

Tickets are picked up within 4 hours (M-F 9-5)

Attachments

Drop files here

Vendor User

01-09-2024 07:33 Additional comments

The changed records are:

Field Name	Original Value	New Value
Change Tax ID / SSN	665924040	665924049

Vendor User

01-09-2024 07:33

RITM0004072 Created

Start

Figure 11: View or Update Vendor Record Screen with an Option to Cancel

## **Module 4 Resolving Rejected Submissions**

This module will walk you through how to view and resolve a submission rejected by regional centers.

### 4:1 Viewing Rejection Type

1. Navigate to the Provider Directory Home page (Figure 6).
2. Click on "Submitted Approvals" using the navigation pane.
3. Find the request with the rejected status by looking at the "Request Status" column (Figure 9). You will see one of two possible reject statuses:

Request Status	Regional Center (RC) Response	Next steps
1. Reject – Closed	Rejected – Please contact the regional center	The RITM is now locked. Please contact the regional center to take an action outside of the Provider Directory following existing regional center procedures.
2. Rejected – Resubmit	Rejected with corrections needed	The RITM has been closed. Locate the RITM in the Closed Confirmations and review comments and attachments to understand what corrections are needed. Return to the Home page, locate the confirmation and restart submission.

## 4:2 Resubmitting a Rejected Request

1. When a request is rejected, a comment providing information on why the request was rejected will be posted by the regional center on the “View or Update Vendor Record Screen” timeline (Figure 12). It will also be emailed to the owner's email.

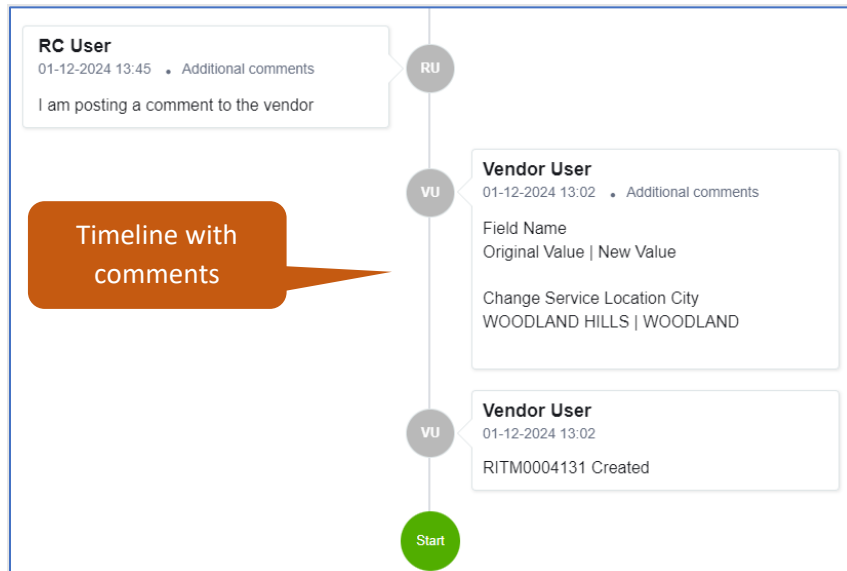


Figure 12: View or Update Vendor Record Screen Timeline

2. If request status is “Rejected - Closed,” please contact the regional center with your RITM number.
3. If request status is “Rejected – Resubmit” your RITM will be closed and your confirmation will be populated to the Home page.  
**TIP:** You can group the records by status by clicking on the “Request Status” column title and continuing to click on the column title until the records with the status you want appear at the top of the table.
4. To view comments, click “Submitted Confirmations” from the navigation pane. Locate the RITM in the table and click the link to open the record and view the comment(s).
5. To submit a change, navigate back to the Home page, click on the Vendor Number of that confirmation to edit the data and resubmit.



## Module 5 Adding Comments and Attachments

This module will walk you through how to add a comment and an attachment to a request that is pending approval.

### 5:1 Adding a Comment or Attachment

1. Navigate to the Provider Directory Home page (Figure 6).
2. Click on the "Submitted Confirmation" using the navigation pane.
3. Click on the Vendor Number of the record you want to open.
4. You will be taken to the View or Update Vendor Record screen
1. You can make a comment by typing a message in the dialog box at the top of the screen and clicking "Send" (Figure 13). You can add an attachment by clicking on the paper clip icon (Figure 13).
5. The comment and/or attachment will be posted in the timeline.

The screenshot displays the 'Vendor User' record for RITM0004121. At the top, there is a text input field labeled 'Type your message here...' with a 'Send' button next to it. An orange callout bubble points to this field with the text 'Type a comment and click "Send"'. To the right of the input field is a paper clip icon, with an orange callout bubble pointing to it that says 'Click to add an attachment'. Below the input field is a timeline of comments and attachments. The first entry is from 'Vendor User' on 01-15-2024 at 13:44, showing a screenshot of an 'Approval Screen.JPG' (42.7 KB). The second entry is from 'Vendor User' on 01-15-2024 at 13:39, with the text 'This is a comment to the RC reviewer'. The third entry is from 'Vendor User' on 01-12-2024 at 10:58, showing a table with 'Field Name', 'Original Value', and 'New Value' for 'Change Tax ID / SSN'. An orange callout bubble points to the timeline with the text 'View comments and attachments here'. On the right side of the page, there is a 'Cancel Request' button, a status box saying 'Your request has been submitted', and a table with request details: Number (RITM0004121), State (Open), Created (4d ago), and Quantity (1). Below this is a note: 'Tickets are picked up within 4 hours (M-F 9-5)'. At the bottom right, there is an 'Attachments' section showing the 'Approval Screen.JPG' (42.7 KB) with edit and delete icons.

Field Name	Original Value	New Value
Change Tax ID / SSN	662273860	662273866

Number	State	Created	Quantity
RITM0004121	Open	4d ago	1

Figure 13: Adding Comments or Attachments

## Module 6 Password Resets

This module will walk you through how to reset your password.

### 6:1 Password Reset



The Provider Directory automatically requests a **password change** 180 days after the last password was set. The service provider will get an email notifying them of the necessity to reset the password with a link that takes them to the password reset page. In addition, the Vendor is able to reset the password if forgotten by using the steps below. If you enter the password incorrectly more than 5 times, the Provider Directory will lock you out for 60 minutes, after which you can either log in with the correct password or reset it using the steps described in the section below.

1. Navigate to the Provider Directory login page (Figure 5).
2. Click on the "Forgot my Password" link. This will take you to the reset password screen (Figure 14)
3. In the reset password screen, enter your account email into the username field under step 1 "Identify" and click "Next". Enter your account email into the email field once you are in step 2 "Verify" and click "Next".

Figure 14: Reset Password Screen

4. You will receive an email with a Password Reset link.
5. Click on the link in the email and enter new password on the password reset page. You will be taken to the Provider Directory Login page.
6. Login to the Provider Directory with the new password.

## Module 7 Adding / Removing Users and Roles

This module will walk you through how to add or remove a user. Please note only PD Provider Admin users may add or remove a user. Contact your admin or email [ProviderDirectory@dds.ca.gov](mailto:ProviderDirectory@dds.ca.gov) to find your administrator if you're not sure.

### 7:1 Add or remove users and roles



PD Provider Admins can edit permission to allow users to manage one of three roles:

- C. PD Provider Admin: Admin users can add and remove other users, as well as update and confirm vendor data.
- D. PD Change Requestor: User can update and confirm vendor data.
- E. PD Read Only: User can review data.

1. Click on the "Provider Support" tab. This will take you to the PD User Management table (Figure 15)

Access Role Group	Current Members	Maximum Members
PD Provider Admin	2	2
PD Read Only	1	20
PD Change Requestors	2	5

Actions	Add, Keep, or Remove?	First name	Last name	Access Role Group	Organization Title
	Keep Access	Charlie	Davis	PD Provider Admin	Manager

Figure 15: PD User Management

2. In the PD User Management table, you can add or remove a user.
3. To add a user, click add. In the popup window (Figure 16), complete as many fields as possible and no less than the email and appropriate access role group and click the add button. Once you select the permissions below, make sure to

click **submit** in the top right corner of the page (Figure 18) to add the user.

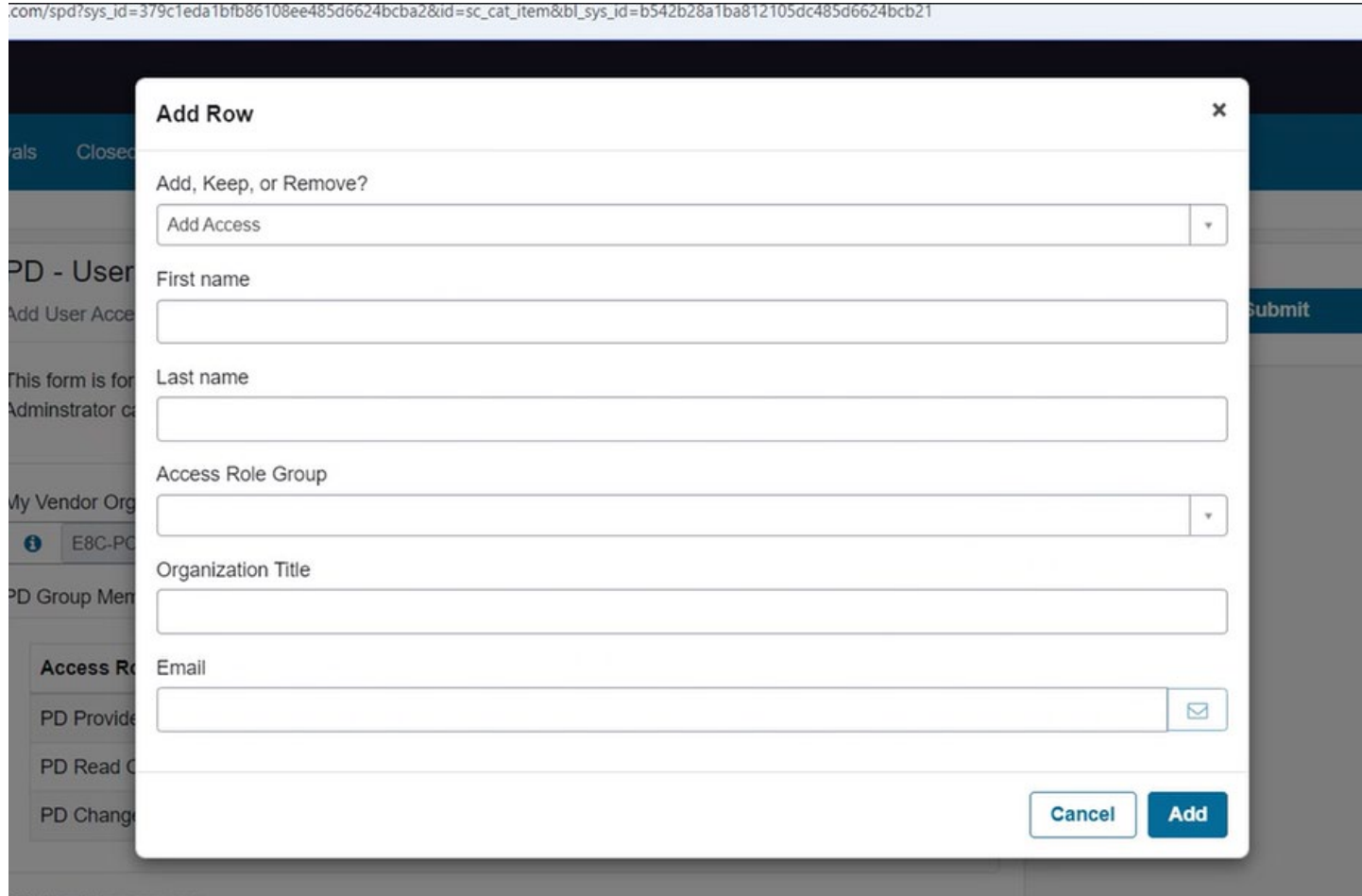
The image shows a web browser window with a URL bar at the top. A modal window titled "Add Row" is open in the center. The modal has a close button (X) in the top right corner. Inside the modal, there is a dropdown menu labeled "Add, Keep, or Remove?" with "Add Access" selected. Below this are input fields for "First name", "Last name", "Access Role Group" (a dropdown), "Organization Title", and "Email" (with an email icon). At the bottom right of the modal are "Cancel" and "Add" buttons. The background shows a blurred view of the main application interface with various menu items and a "Submit" button.

Figure 16: Adding a user

4. To remove a user, you can select the x next to the user's name in the actions table. When you're prompted to delete the row (Figure 17). You will see the user removed on the refreshed screen. Click **submit** in the top right corner to finish removing the user (Figure 18). Please note if you do not hit submit, this action is not complete.

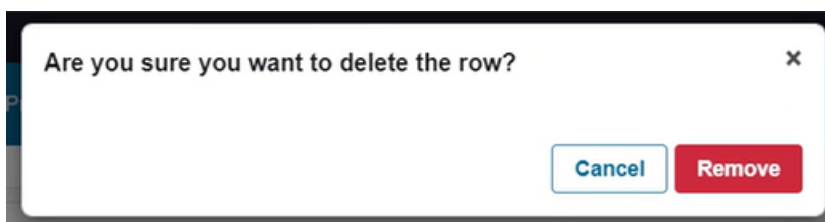
The image shows a small modal window with the title "Are you sure you want to delete the row?". It has a close button (X) in the top right corner. At the bottom right, there are two buttons: "Cancel" and "Remove". The "Remove" button is highlighted in red.

Figure 17: Remove a user

PD - User Management

Add User Access

This form is for Provider Directory user administration by the provider administrator to delegate access. A Provider Administrator can 'Add' access for their organizational contacts.

My Vendor Organization

E8C-POS VENDOR

PD Group Membership

Access Role Group	Current Members	Maximum Members
PD Provider Admin	1	2
PD Read Only	1	20
PD Change Requestors	2	5

PD User Management

AddRemove All

Actions	Add, Keep, or Remove?	First name	Last name	Access Role Group	Organization Tit
	Keep Access	Charlie	Davis	PD Provider Admin	Manager
	Keep Access	Maneet test change		PD Change Requestors	
	Keep Access	Maneet test read		PD Read Only	
	Keep Access	kimTesting	Testing CR	PD Change Requestors	mgr

Submit

Figure 18: Submitting a change

# QUESTIONS?

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