How to use the Provider Directory Portal

SERVICE PROVIDERS

Created by the Department of Developmental Services for Service Providers

October 18, 2024

Department of Developmental Services

TABLE OF CONTENTS

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 caddsprod@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.

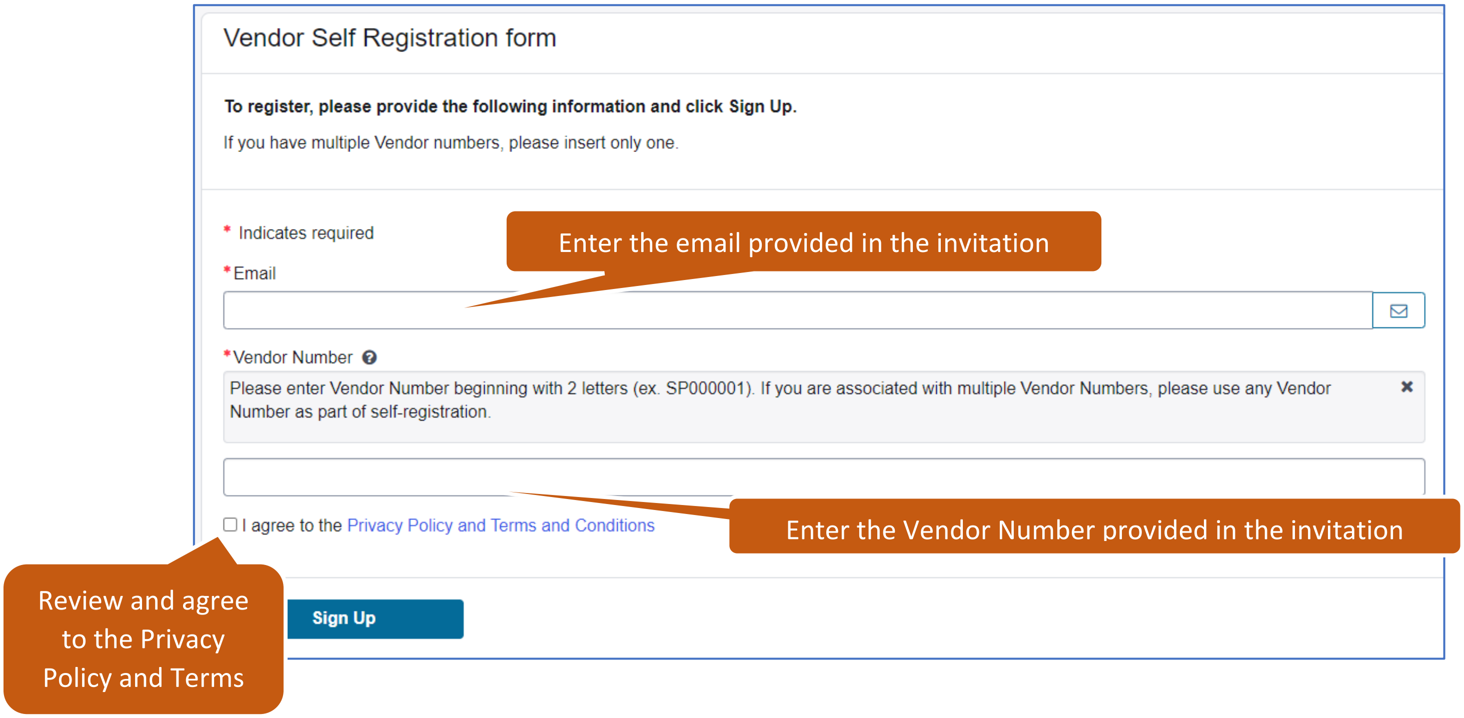
Self-Registration

Thank you.

DDS Department of Developmental Services

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.


Vendor Self Registration form

To register, please provide the following information and click Sign Up.

If you have multiple Vendor numbers, please insert only one.

* Indicates required

*Email

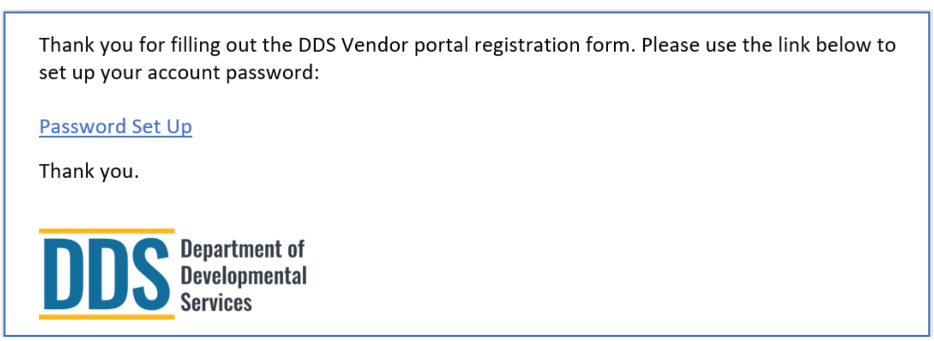
*Vendor Number

Please enter Vendor Number beginning with 2 letters (ex. SP000001). If you are associated with multiple Vendor Numbers, please use any Vendor Number as part of self-registration.

I agree to the Privacy Policy and Terms and Conditions

Sign Up

Figure 2: Vendor Self Registration Form


Thank you for filling out the DDS Vendor portal registration form. Please use the link below to set up your account password:

Password Set Up

Thank you.

DDS 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.

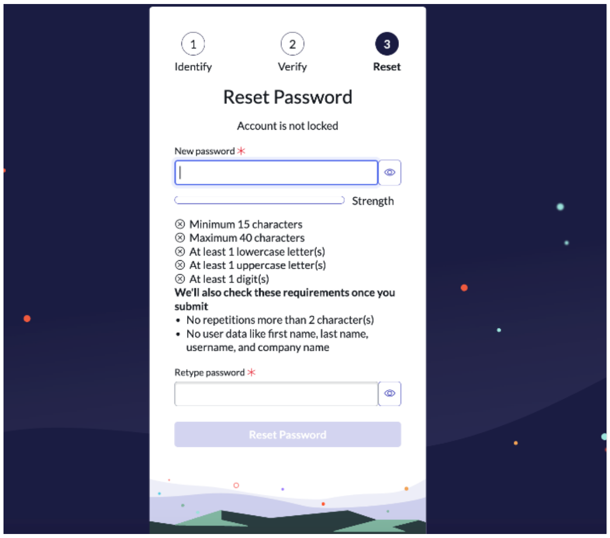


Figure 4: Password Set Up Screen

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.”

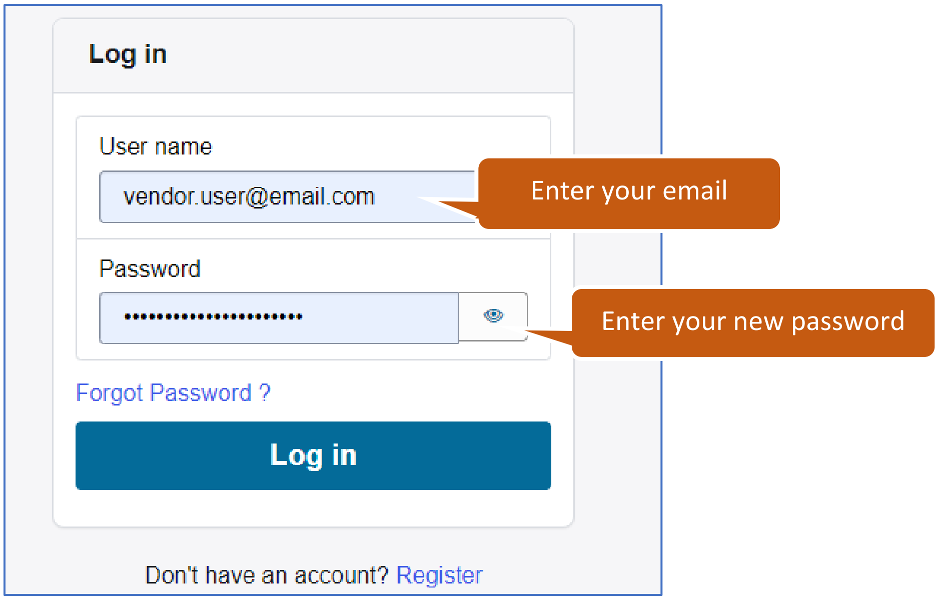


Figure 5: Provider Directory Login Screen

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.

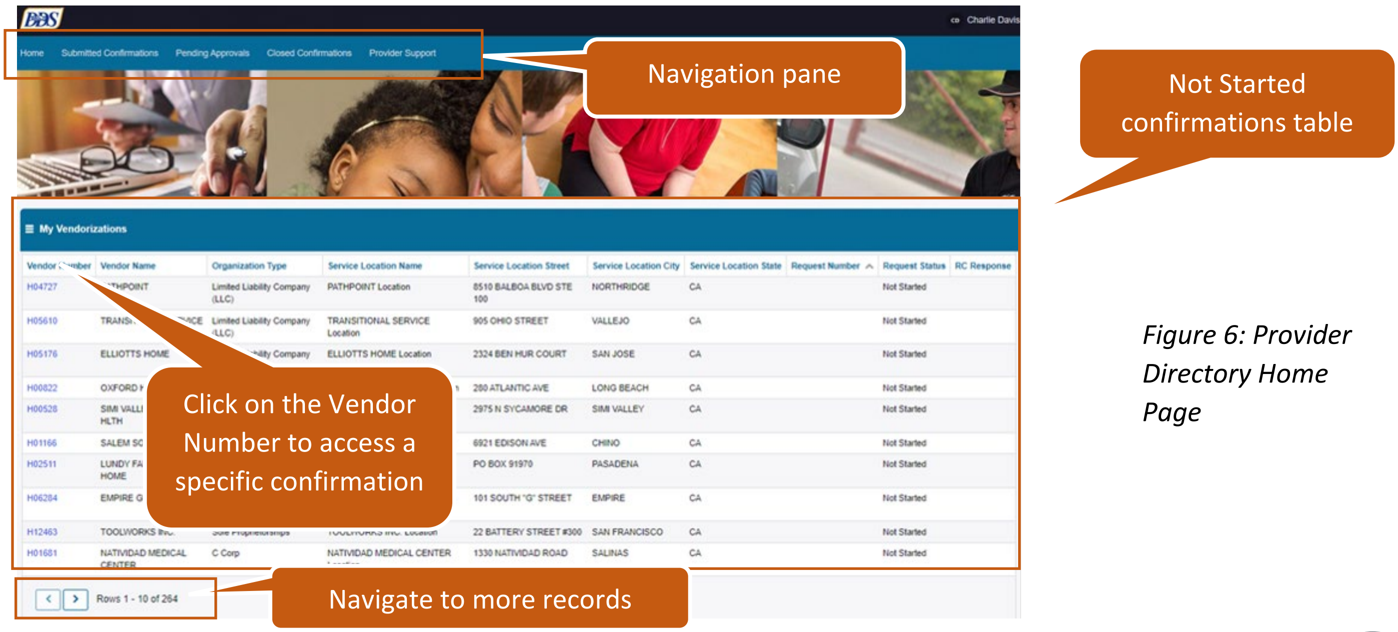


Figure 6: Provider Directory Home Page

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.

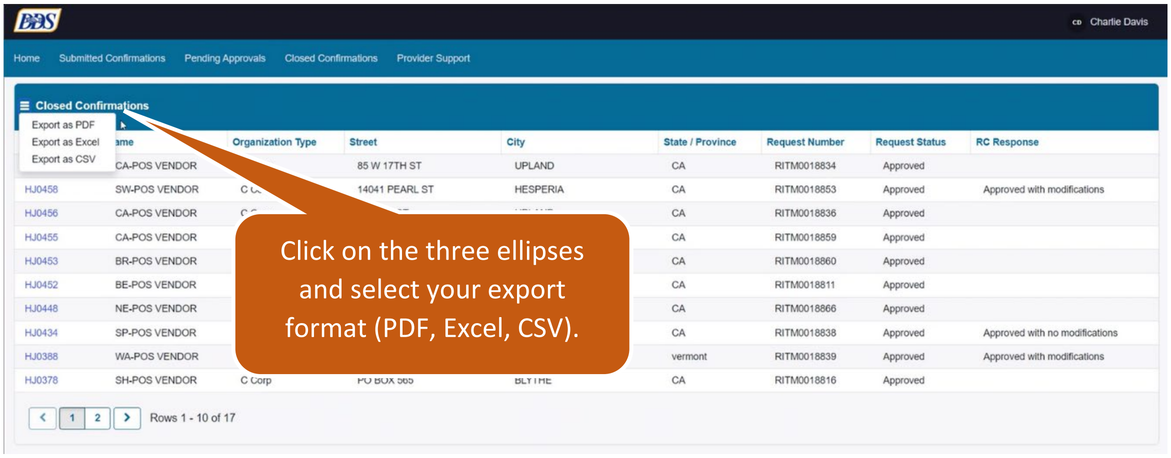


Figure 6.1: Export Confirmations

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).

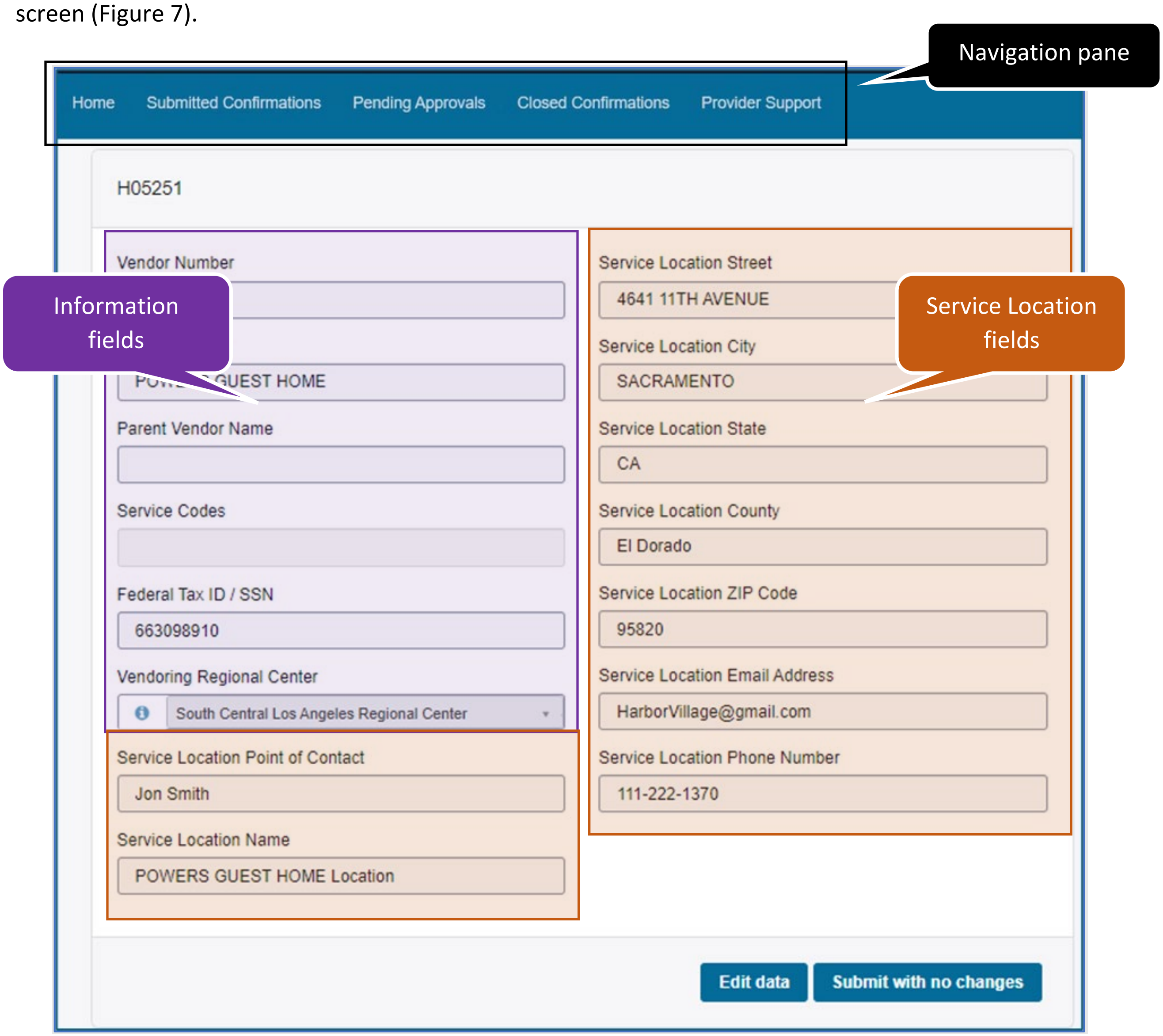


Figure 7: Confirmation Information Screen

3. Review the information provided in the information and service location fields.
4. If edits are needed, please seen 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.

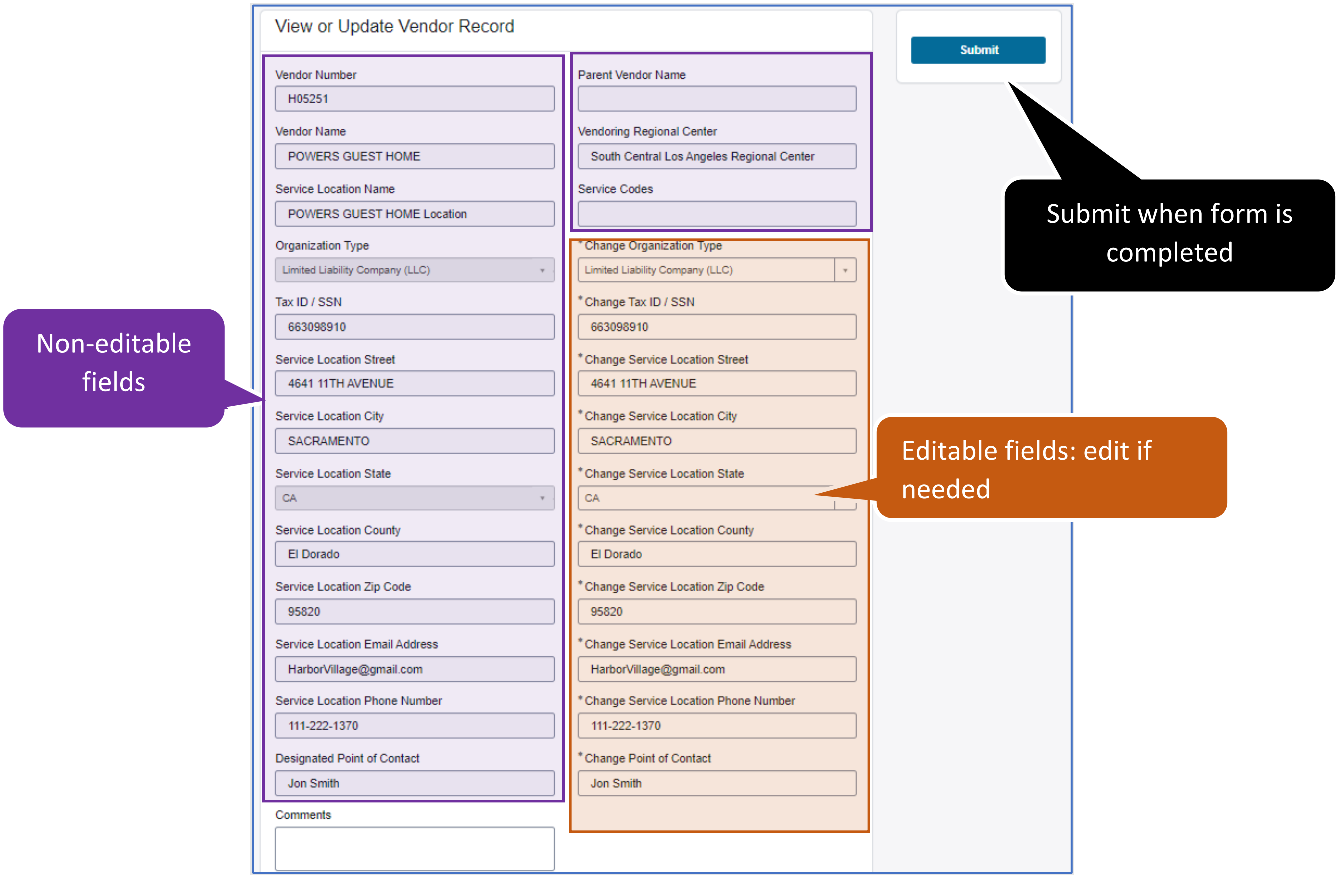


Figure 8: Update Vendor Record screen

Module 3 - Tracking a Change Request

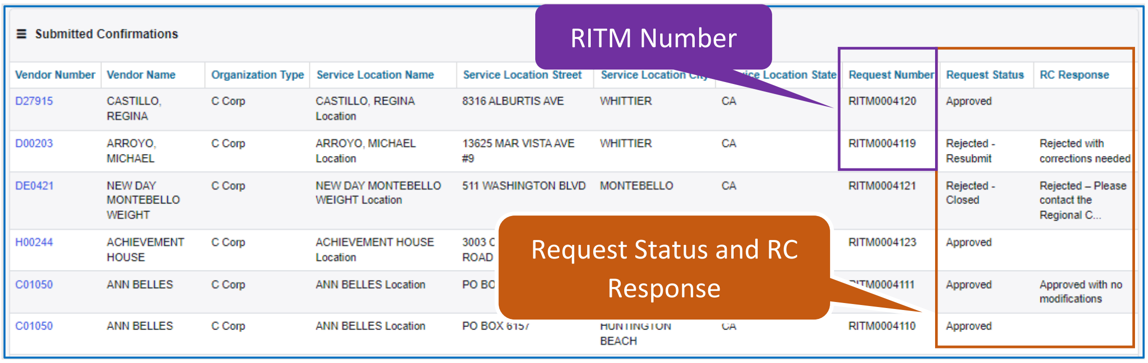
This module will walk you through how to view the status of your requests and cancel a pending change request that has been submitted by you.

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	Request 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 BC			TM0004111	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.

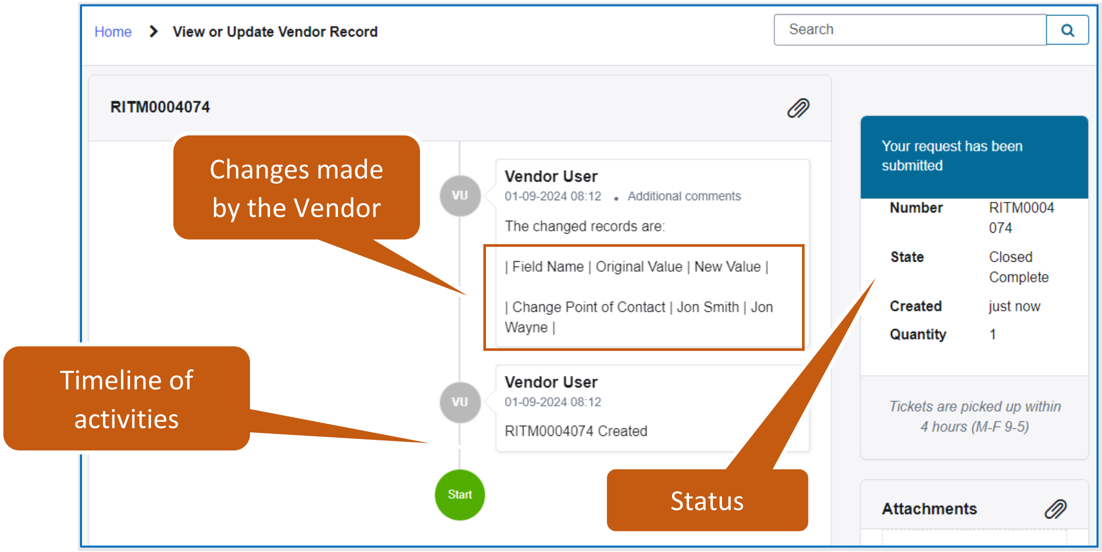


Figure 10: View or Update Vendor Record Screen

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.

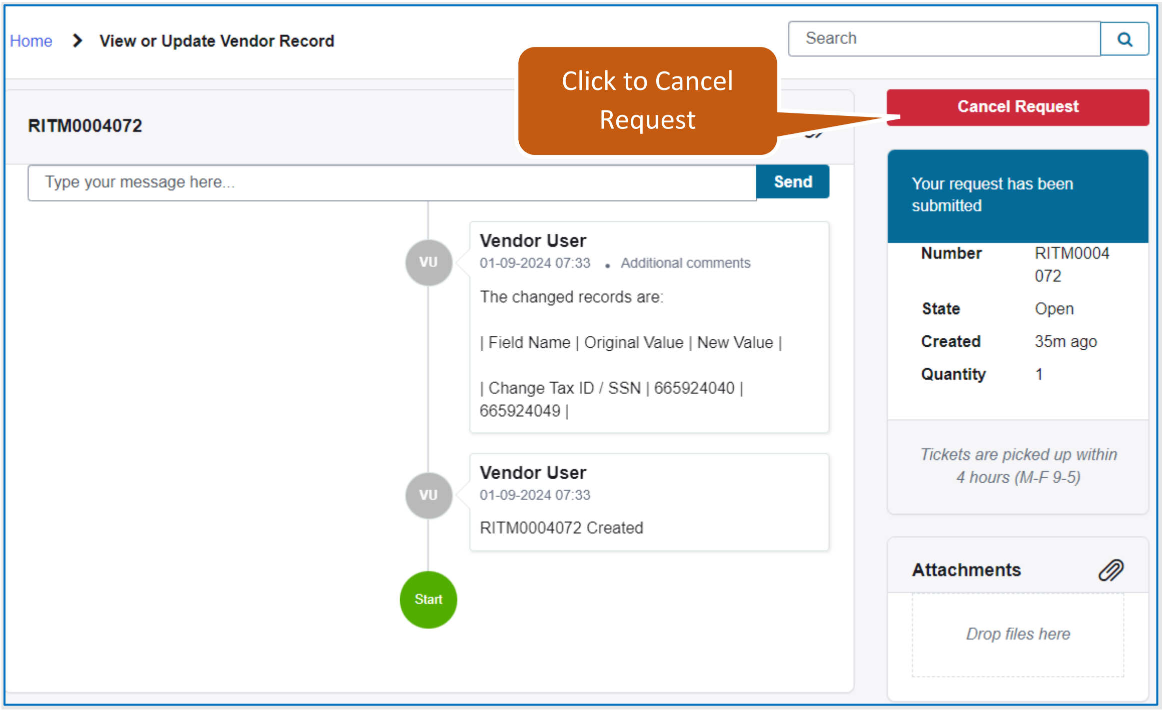


Figure 11: View or Update Vendor Record Screen with an Option to Cancel

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.

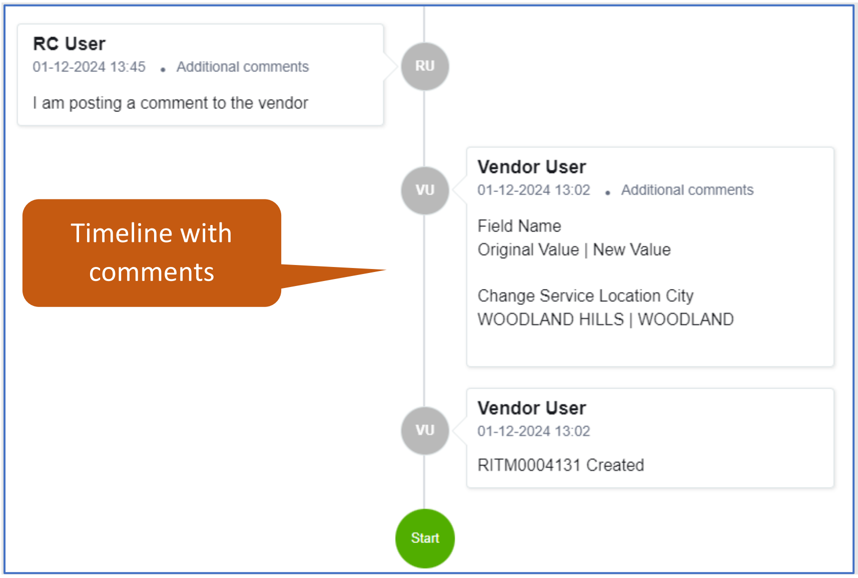


Figure 12: View or Update Vendor Record Screen Timeline

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.

<u>Module 5 Adding Comments and Attachments</u>

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.

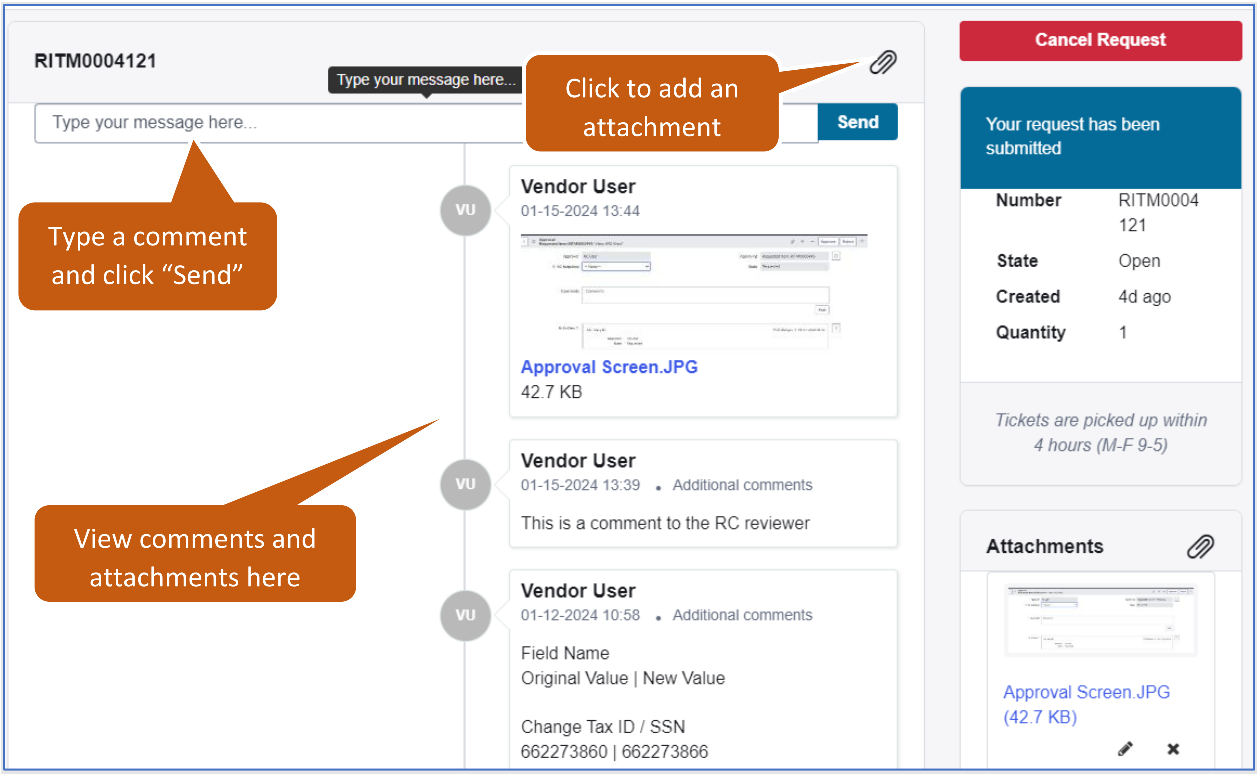


Figure 13: Adding Comments or Attachments

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”.

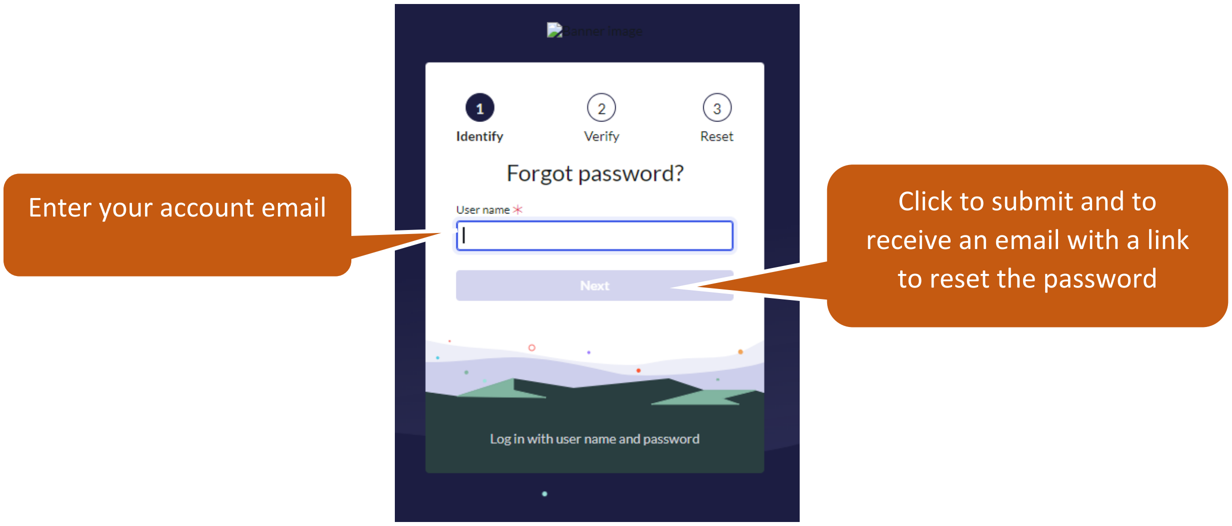


Figure 14: Reset Password Screen

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** 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)

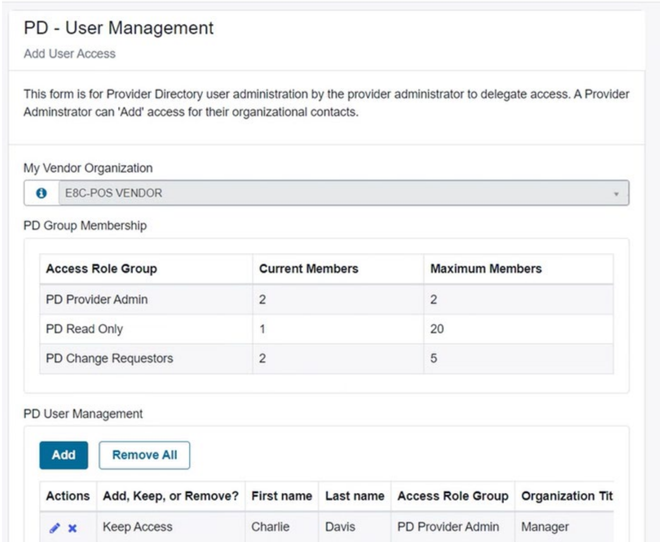


Figure 15: PD User Management

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.

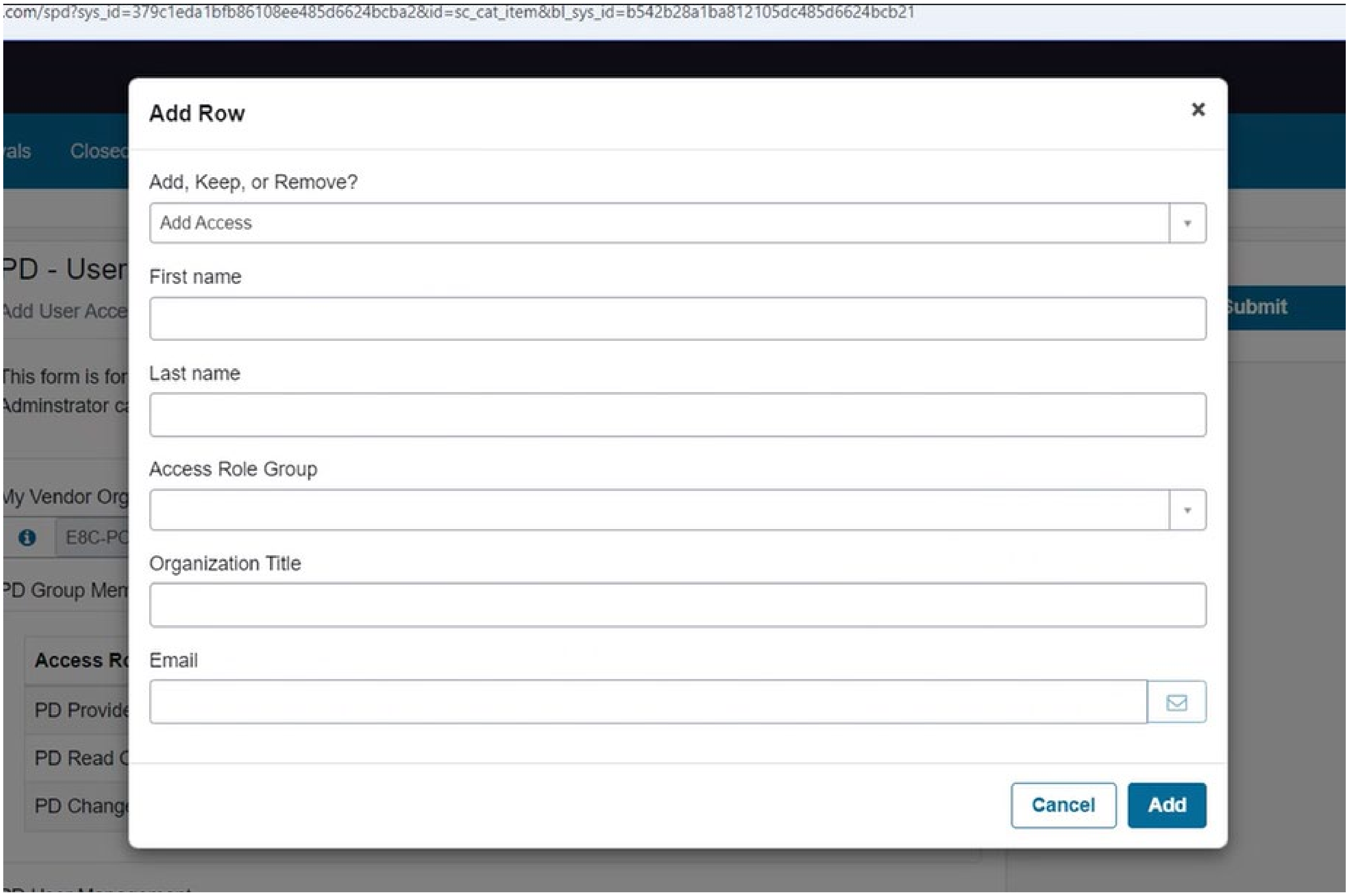


Figure 16: Adding a user

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.

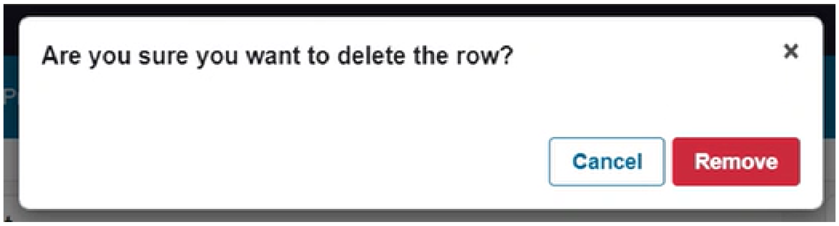
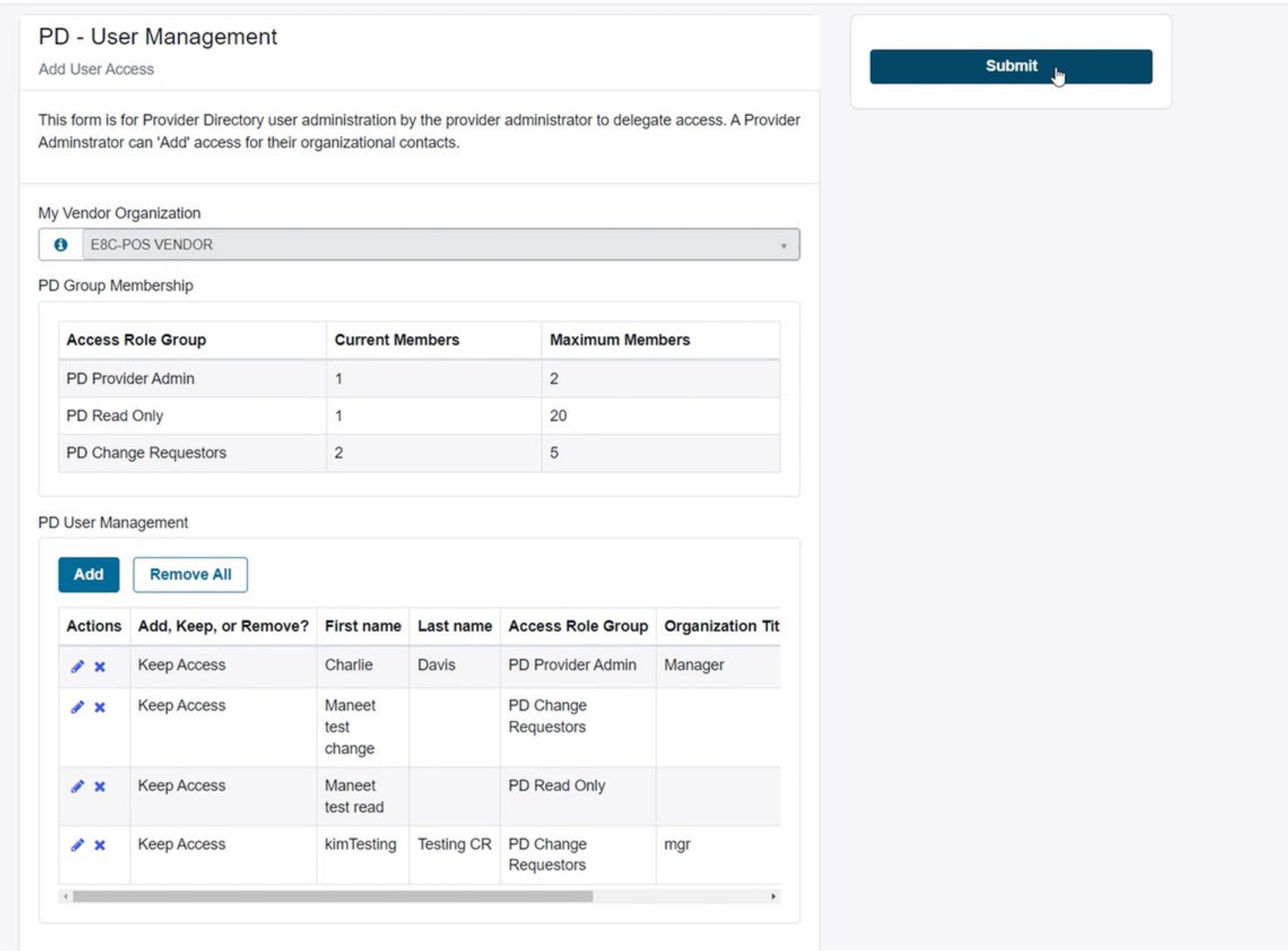


Figure 17: Remove a user



PD - User Management

Add User Access

This form is for Provider Directory user administration by the provider administrator to delegate access. A Provider Adminstrator 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

Add Remove 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?

Email: ProviderDirectory@dds.ca.gov