How to use the Provider Directory Portal

REGIONAL CENTERS

Created by the Department of Developmental Services for Regional Centers

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DDS Department of Developmental Services

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How to Use this Guide

This guide provides step-by-step instructions to help you review and respond to a vendor change request, as well as tips to help you work smart.

Through the guide, you’ll find icons and callouts highlighting important and helpful information. To help you navigate this guide, here are the icons and what they signify:

Icons

! = Important Notes

= Helpful Hints

= Definitions

Colored callouts

Action = Action to be taken

Information = Information

REGIONAL CENTERS

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

"PD-qualified service providers" refers to service providers that are currently included in the Provider Directory. The current definition can be viewed in the General FAQ document on the Provider Directory website at https://www.dds.ca.gov/initiatives/provider-directory/.

Module 1 – Log In and Home Page Orientation

This module will walk you through logging in and homepage orientation.

DDS recommends using Google Chrome or Microsoft Edge to access the Provider Directory. 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 Log In

1. Open a browser and copy and paste https://caddsprod.servicenowservices.com/ into the search bar.
2. You will be automatically logged in.

1:2 Homepage Orientation

Upon login, you will be directed to the Pending Approvals table (Figure 1). At the top of the page, is the navigation page. It contains six tabs.

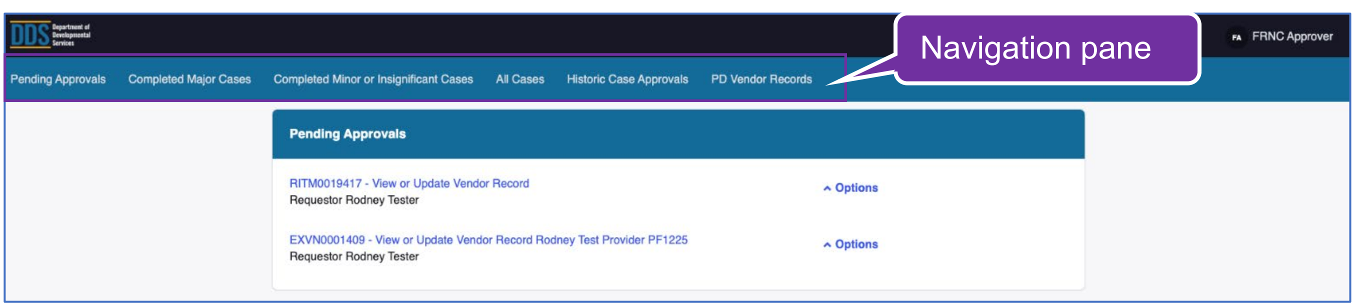


Figure 1: Pending Approvals table

The six tabs across the top of the page provide you with the most important tables for your role in the Provider Directory.

The first five tables display data exclusive to your vendorizing regional center. In contrast, the sixth table lists all Provider Directory-qualified, service providers, across all regional centers. The following is a **brief** description of each tables' contents:

Table	Description
Pending Approvals	This table displays a list of all submitted cases or request items with major changes that require the regional center to either approve or reject the case or request item.
Completed Major Cases	This table displays a list of cases submitted with major changes and processed by the regional center.
Completed Minor or Insignificant Cases	This table displays a list of cases submitted with minor or insignificant changes. This case type is automatically approved. There is no action for the regional center to take in the Provider Directory.
All Cases	This table displays a list of all cases, inclusive of all approval states (e.g., requested).
Historic Case Approvals	This table displays a list of all cases with a status of closed, which results from a service provider submitting a minor or no change case or a regional center approving or rejecting a case.
PD Vendor Records	This table shows a list of all vendors from the 21 Regional Centers who were invited to register for the Provider Directory. Request items that were closed before the transition to case, can be viewed in a vendor's record, accessible via this tab.

The accuracy of each vendor record listed in the PD Vendor Records tab depends on how well the provider maintains their information, including the original submission.

!

A service provider can cancel a pending major request when the case state is "open". A cancelled case will appear in completed major cases, all cases, and historic case approval tables with an approval status of "rejected."

The following table details the case* change types and statues summarized in the prior table, providing more specifics about what is included in each table. It also prescribes the action to be taken by the regional center.

For change type definitions, see 2:1.

Table	No change	Minor change	Major change	Case cancelled by SP	Case state	Approval State	RC Action Needed
Pending Approvals	No	No	Yes	No	Open	Requested	Review and approve or reject
Completed Major Cases	No	No	Yes	Yes	Approved, Cancelled	Approved, Rejected	None
Completed Minor or Insignificant Cases	Yes	Yes	No	No	Closed	Approved	None - Case was automatically approved
All Cases	Yes	Yes	Yes	Yes	Open, Closed, Cancelled	Approved, Rejected, Requested	Review and approve or reject requested case
Historic Case Approvals	Yes	Yes	Yes	Yes	Closed, Cancelled	Approved, Rejected	None

* ”Case,” in this table, refers to Case (EXVN) or request item (RITM). For case type definitions, see 2:2.

Module 2 – Change Review and Case Tracking

This module outlines service provider change request classifications and case tracking.

- In the Service Provider portal, a vendor record is referred to as a **Confirmation**.
- Each submitted confirmation is categorized: no change, minor change or major change.
- Each submitted confirmation generates an ID.
- A submitted confirmation is also referred to as a change request.

<u>2:1 Minor or Insignificant vs. Major Change Requests</u>

A service provider can submit a confirmation with no changes or make changes and then submit. Changes are classified as 1) Minor or Insignificant or 2) Major. "**Minor**" changes include edits to any or all the following fields:

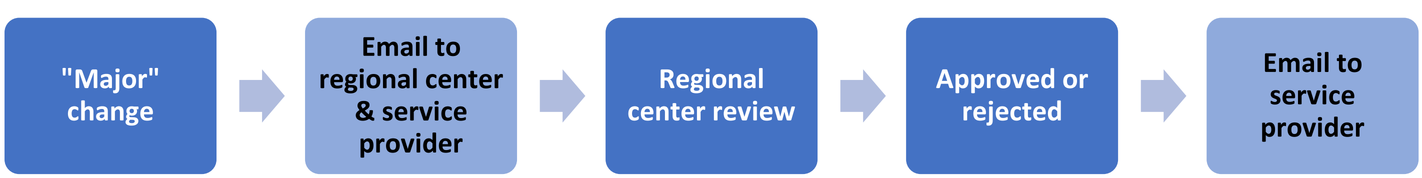
- Organization Type
- Service Location Phone Number
- Service Location Email Address
- Designated Point of Contact

If a service provider makes a "**Minor**" change and submits, the change is <u>automatically approved</u>, and the Provider Directory sends an email confirmation to the service provider. No action is needed from the regional center.

"**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
- Service Location Street
- Service Location City
- Service Location State
- Service Location Zip Code

If a service provider makes a "**Major**" change, the <u>request will go to the vendorizing regional center</u> for review and approval or rejection. The Provider Directory sends email notifications to the regional and the service provider. When the regional center approves or rejects the vendor record, the Provider Directory sends an email confirmation to the service provider.



2:2 Case Tracking

An ID is assigned to each submitted confirmation. There are two possible IDs:

- A **Case Number** (EXVN) is used to track submitted vendor confirmations, including change requests.
- A **Request Item Number** (RITM) was used to track submitted vendor confirmations, including change requests. Provider Directory transitioned from Request Item Number to Case Number. RITMs may be part of a vendor's historical record, depending on the date that the vendor began submitting confirmations.

Module 3 – Review and Accept or Reject a Change Request

This module will walk you through how to access, review, and accept or reject a service provider change request. It will also cover how to view comments and attachments, as well as add them.

3:1 Access a Change Request

Each time you login to the Provider Directory, you will land on the Pending Approvals (Figure 2) table. Pending Approvals are the "major" change requests that are awaiting your decision.

1. To view a summary of the vendor's record and change request, click the Options link.
2. To view a summary of the vendor's record and change request AND reject or approve the change request, click the Case (EXVN) or Request Item (RITM) link.

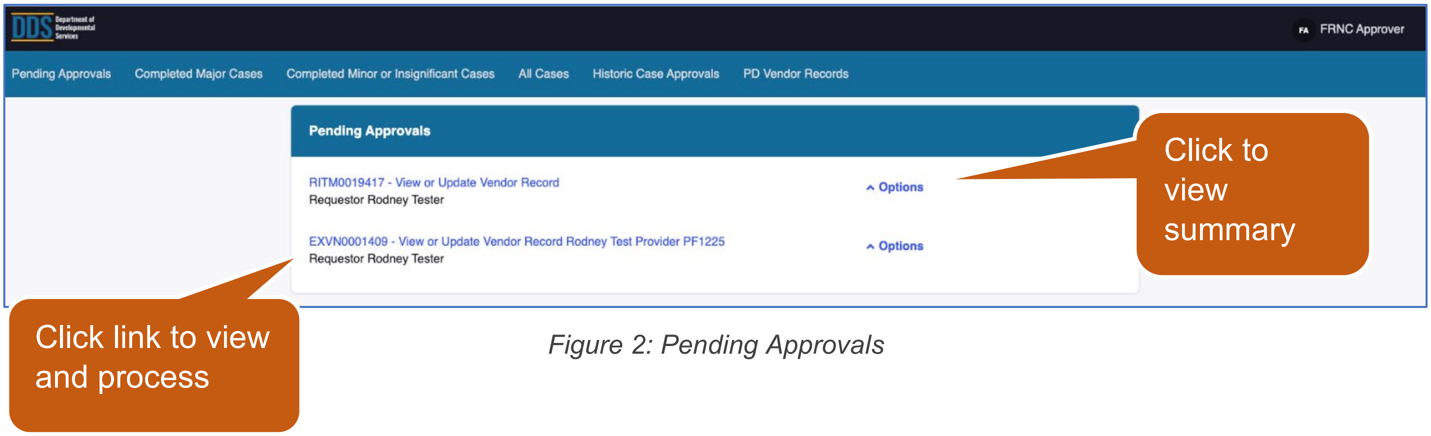


Figure 2: Pending Approvals

3:2 Review Change Request

After clicking the case (EXVN) or request item (RITM) link, you will be directed to the Approval Request Screen (Figure 3). The case screen is organized into four segments. The screen for Request item has 3 segments, as it excludes the change summary segment.

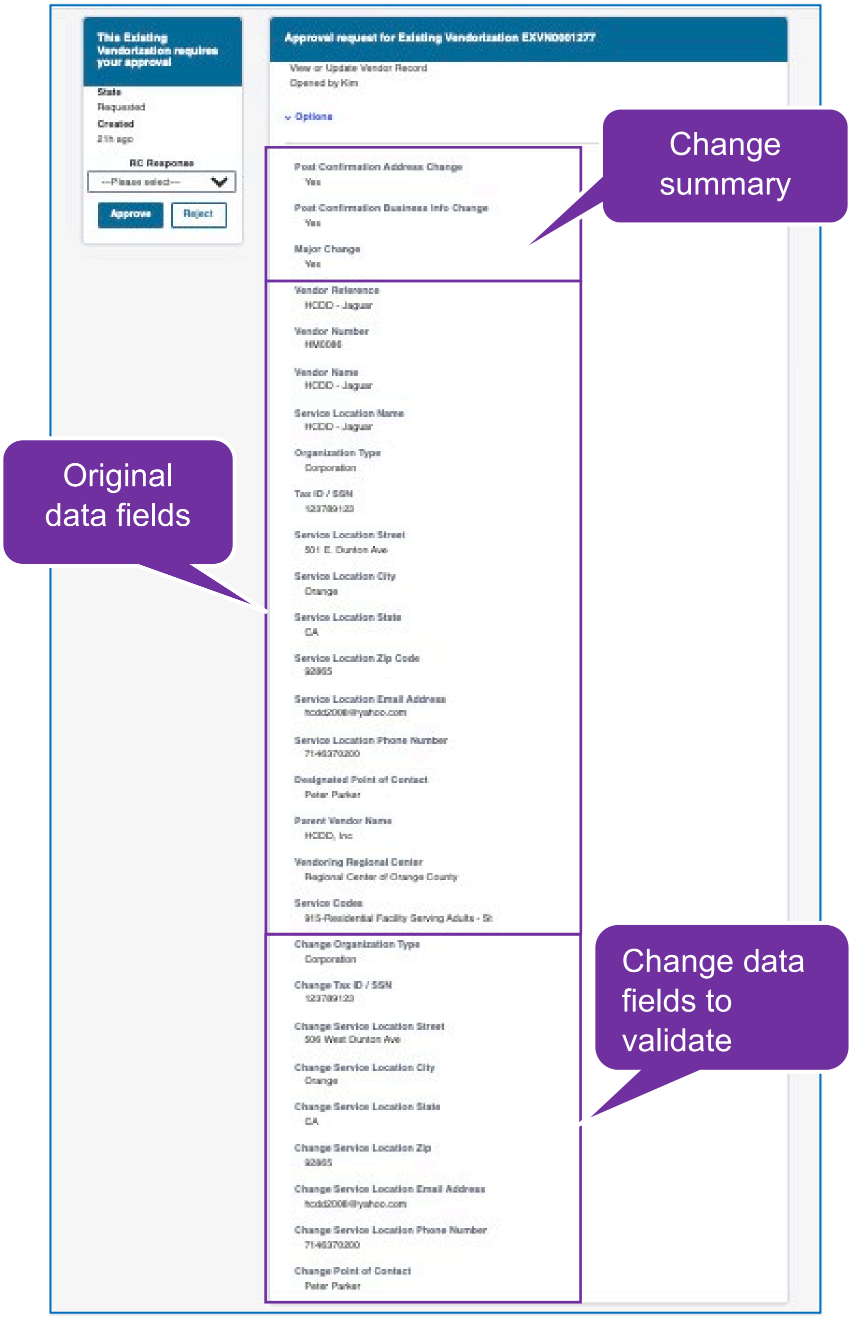


Figure 3: Approval Request Screen (Top section of the Approval Requested Screen)

Approval Request – Change Summary

In the top segment of the screen, above the original data fields, are three fields that provide a short summary of the case. After the original confirmation (first submission in the Provider Directory) is submitted and the case or request item is closed, these fields report changes made in the active case.

Post confirmation type	Fields in post confirmation type	Yes	No
Address change	Service Location Street, City, State and/or Zip code	A change was made to one or more of the fields in this post confirmation type	No changes were made to any of the fields in this post confirmation type
Business info change	Organization Type, Service Location Phone Number, Service Location Email Address, Designated Point of Contact, Tax ID		
Major change	Tax ID, Service Location Street, City, State, Zip Code		

The Approval Request screen for a Request item (RITM) does not include these 3 fields. This information only applies to case (EXVN).

Approval Request – Original and Change Fields

Below the change summary segment are the original and change data fields (Figure 3). The change data fields, indicated by the word "change" in the title of the field, are pre-populated and will differ from the original data fields only when the service provider made a change to an editable field. To quickly identify which major field(s) changed, view the timeline in the Activity Stream (Figure 4).

Approval Request – Activity Stream

Below the information fields is the Activity Stream (Figure 4).

1. You can access the Activity Stream by scrolling down the page.
2. Alternatively, you can click the “Options” link near the top of the screen. The top section of the screen will be hidden.

In the Activity Stream, you can view major changes. Both the original and new values are displayed.

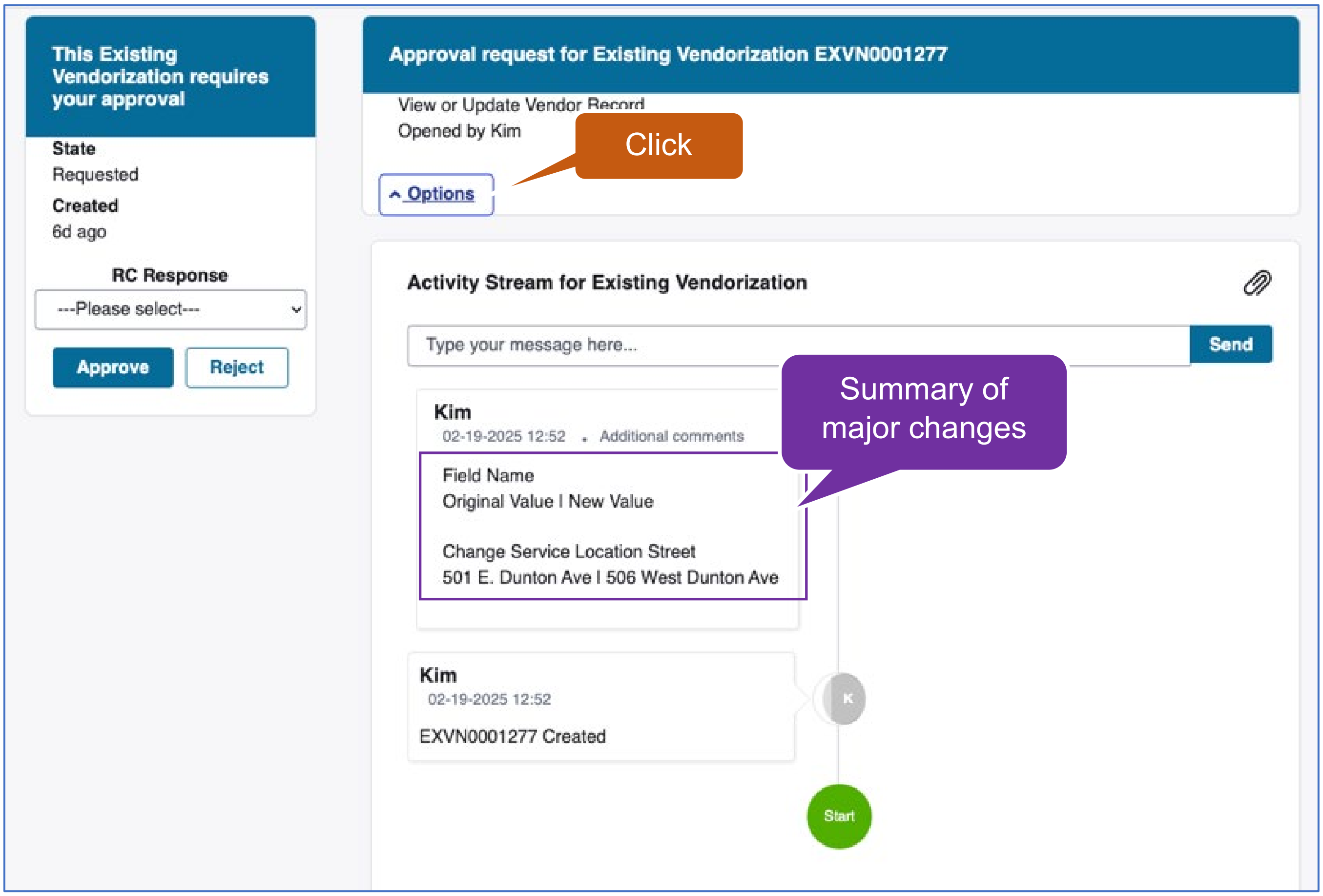


Figure 4: Activity Stream (Bottom section of the Approval Request Screen)

> “Minor” change details do not display in the Activity Stream, but they can be viewed in change data fields within the Approval Request screen in the top section of the page (Figure 3).

3:3 Regional Center Response Scenarios

Once you review the change data fields, you have four response options to choose from.

The following is a suggested use and scenario for each regional center response option available in the RC Response screen (Figure 5).

Regional center response option	**Suggested use**	**Example scenarios**
Approved with no modifications	Approve major change as submitted	Major change can be approved
Approved with modifications	Approve major change as submitted but tasks outside of the Provider Directory may be required	Major change may impact provider's record (e.g., program director, administrator, staffing credentials/licenses) and follow up is needed
Rejected with corrections needed	Reject major change as submitted and prescribe changes to be made using comments within the Provider Directory	Major change signals information or changes needed (e.g., information does not match records on file, such as disclosure, contract amendment, program design)
Rejected – please contact the Regional Center* ***Warning** – when this response option is used, the data record will be locked, and no additional changes can be submitted by the service provider. **Please use this option only if locking the record is required.**	Reject major change	Change request impacts vendorization

3:4 Approve or Reject a Request

Considering the best response option for the change request (See 3:3), proceed with recording an approval or rejection decision.

1. At the top left corner of the requested item information screen (Figure 3), locate a box labeled “This existing vendorization requires your approval” (Figure 5).
2. Click the RC Response option box to open the list. Select the appropriate RC Response from the four options.

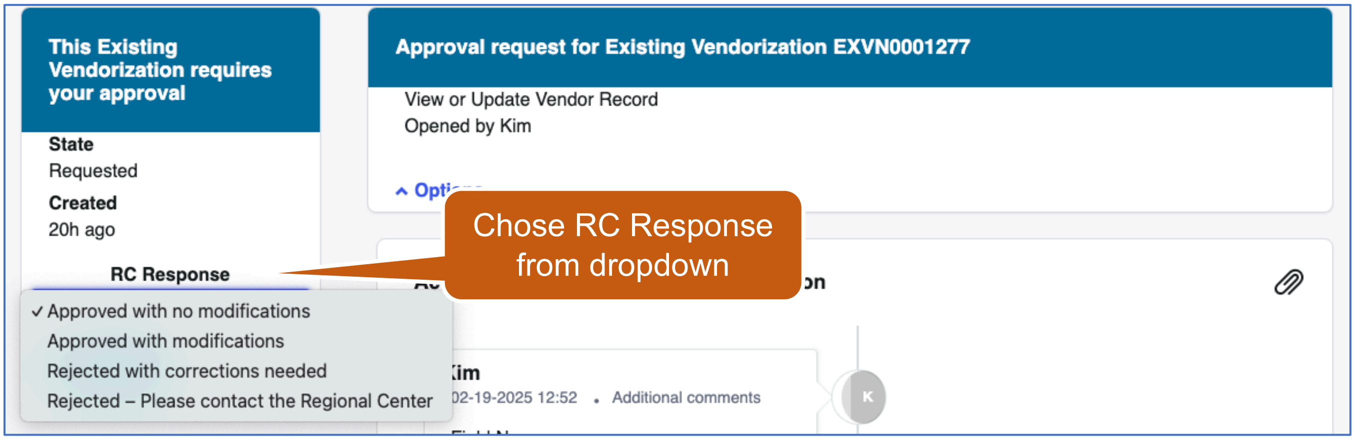


Figure 5: RC Response (Top left corner of the Approval Request for Existing Vendorization screen)

After making the selection, click the appropriate “approve” or “reject” button.

3. If you choose either of the two reject options, you MUST include comments in the comments box (Figure 6).
    a. To access the reject comment box, click the “reject” button. A red warning sign will appear at the top of the page and the comment box will appear.
    b. Make a comment and click the “reject” button.

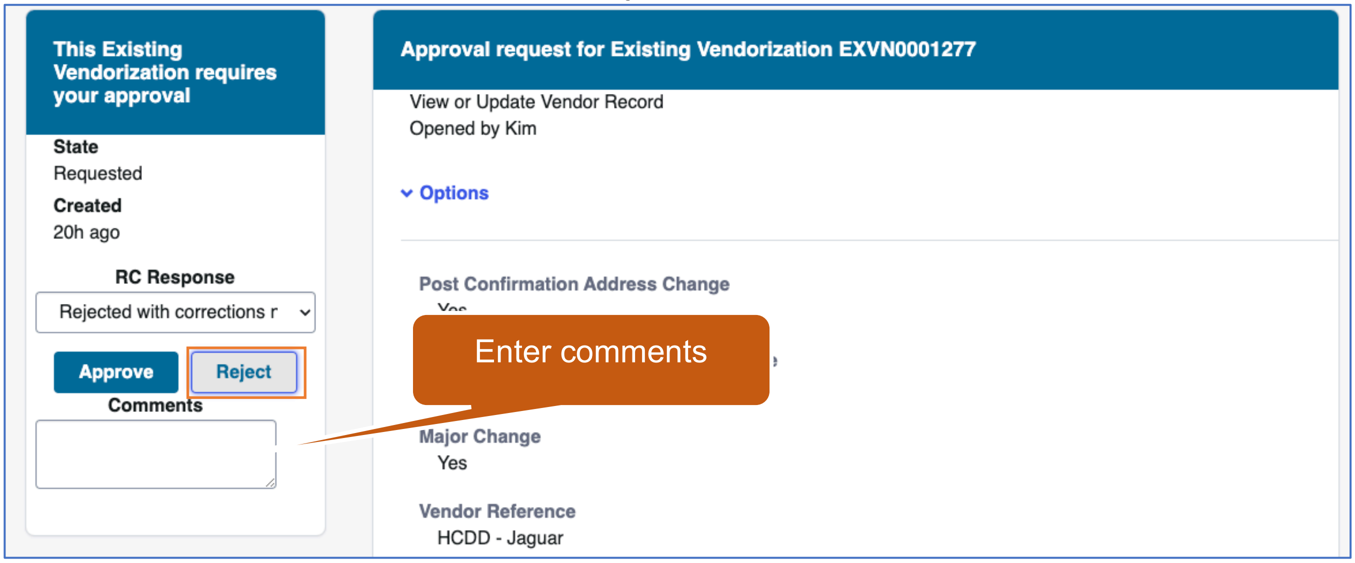


Figure 6: Reject (below RC Response pulldown)

3:5 Add Comments and Attachments

> !
>
> Comments and attachments enable the service provider and regional center to communicate and exchange information within the Provider Directory. There are no limits on the number of comments per case.
>
> If the service provider cancels their request, all comments and attachments will remain with the closed case.
>
> Adding comments to **closed** cases is discouraged if you aim to initiate an active dialogue, as no notification emails are generated for closed cases. Comments can be used for record-keeping purposes.

1. To add comments or attachments, click the desired case link from the appropriate tab.
    a. If opening a case on the Pending Approvals tab, the Approval Request Screen (Figure 3) will open. Scroll down the screen to the Activity Stream for Existing Vendorization (Figure 7) segment.
    b. If opening a case in another tab, the View or Update Vendor Record screen (Figure 8) will open.
2. To add a comment, type your message in the box that says, “Type your message here…” and click the “Send” button. The comment will appear in the stream.
3. To add an attachment, click on the paper clip icon and choose a file to attach. The attachment will be listed in the stream.

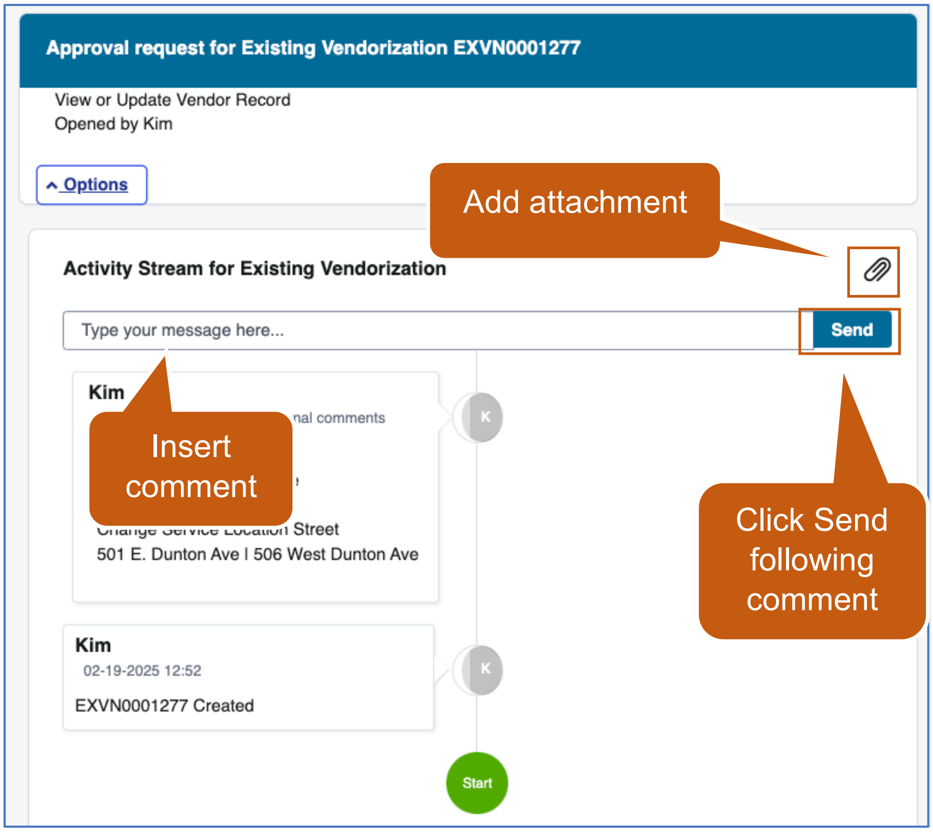


Figure 7: Activity Stream for Existing Vendorization: Pending Approval table

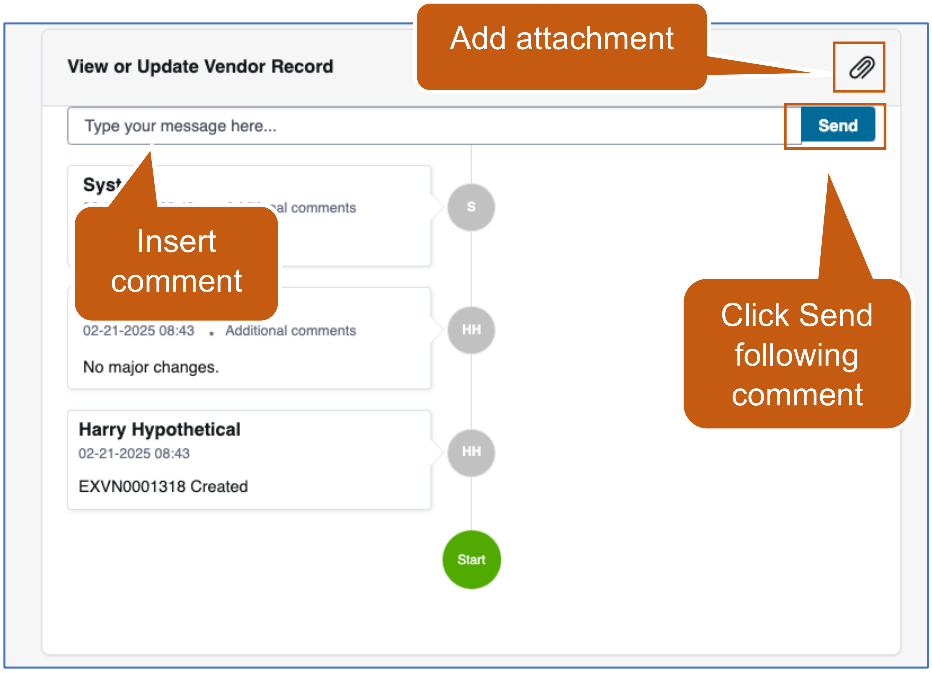


Figure 8: View or Update Vendor Record: [other] table

Module 4 – Search and Export Techniques

This module will walk you through how to search, sort and export data in the Provider Directory.

4:1 Search

Keyword search is a powerful tool. This tool is included in all Provider Directory tables except Pending Approvals.

You can search by field type (e.g., vendor ID) as well as field contents (e,g., 24 Hour Home Care, “Approved)”. You can also combine search conditions, such as “24 Hour Home Care and Approved.” Enter the complete search term, such as “PL1997,” as opposed to “1997.”

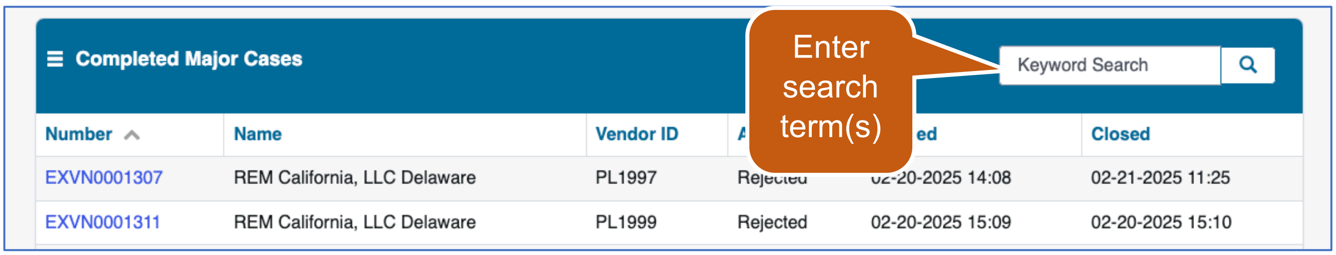


Figure 9: Keyword Search: Table

You can also use keyword search within submitted records for a single vendor. This view is accessible via PD Vendor Records tab.

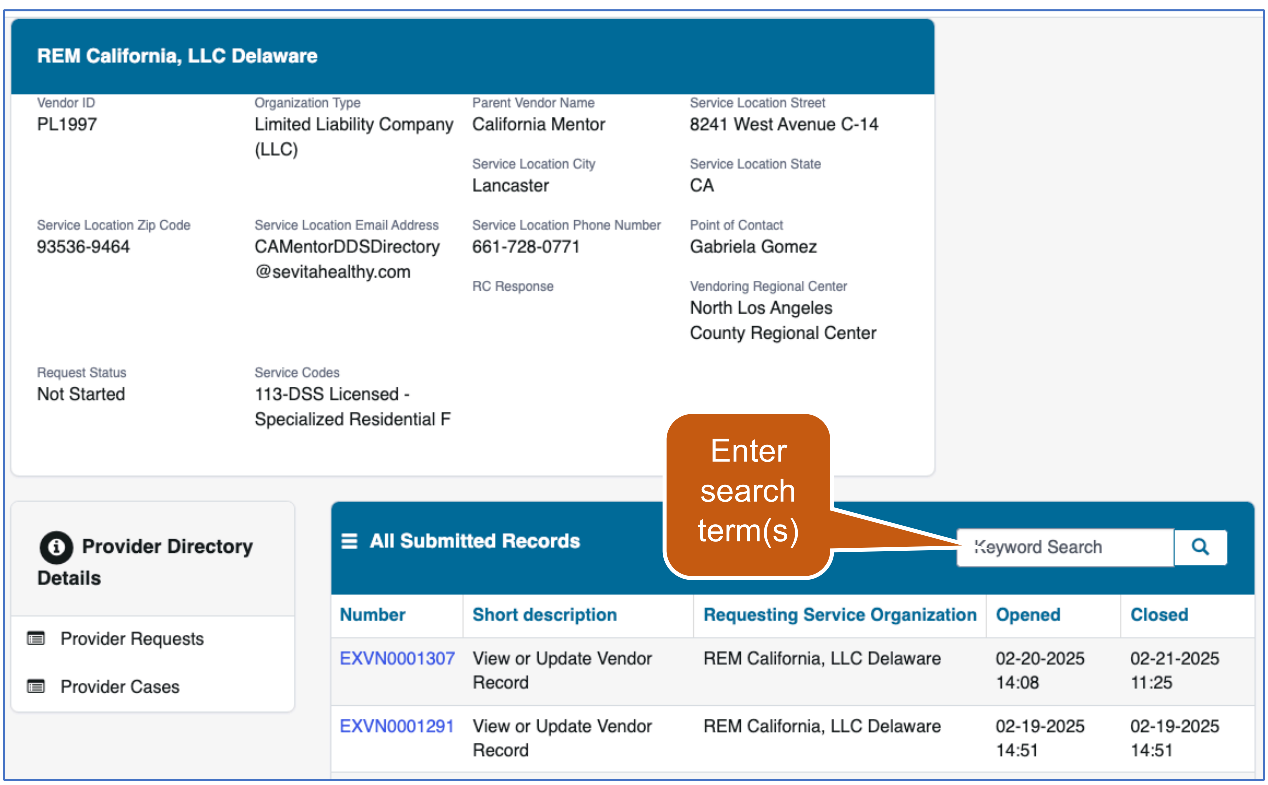


Figure 10: Keyword Search: Vendor Record

4:2 Sort

Each column on a table can be sorted.

1. Click the column label for contents to be sorted ascending or descending. Sort order is indicated by the carrot (^) next to the column label. “^” signals ascending sorting.
2. Click the column label again to reverse sort order.

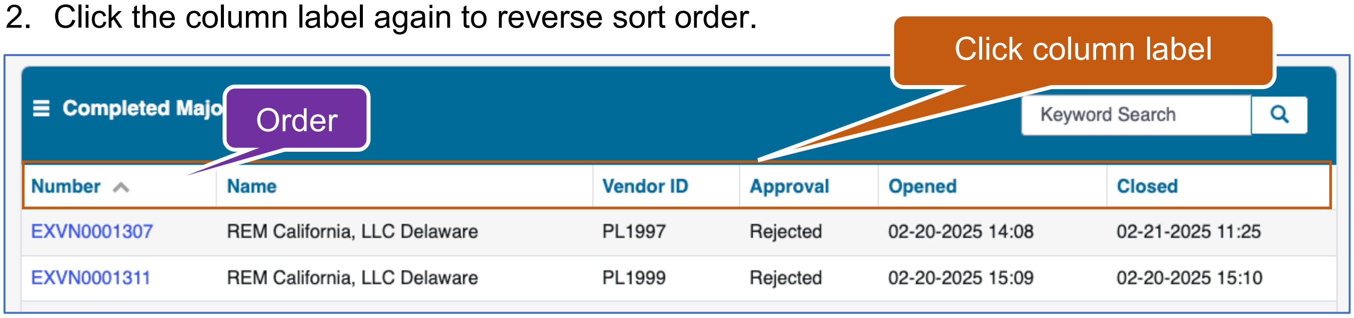


Figure 11: Sort & order

> In the PD Vendor Records table, sorting the Service Code column will produce inconsistent results because the field is a list of values, as opposed to a single value. Sorting this column is, therefore, not recommended.

4:3 Export Data

Data contained in a table can be exported. Chose a table from the navigation page. Locate the hamburger icon in the top left corner of the blue bar, next to the table’s title, and click it to expose file format options (Figure 12).

Click on a file export option. The file will download automatically.

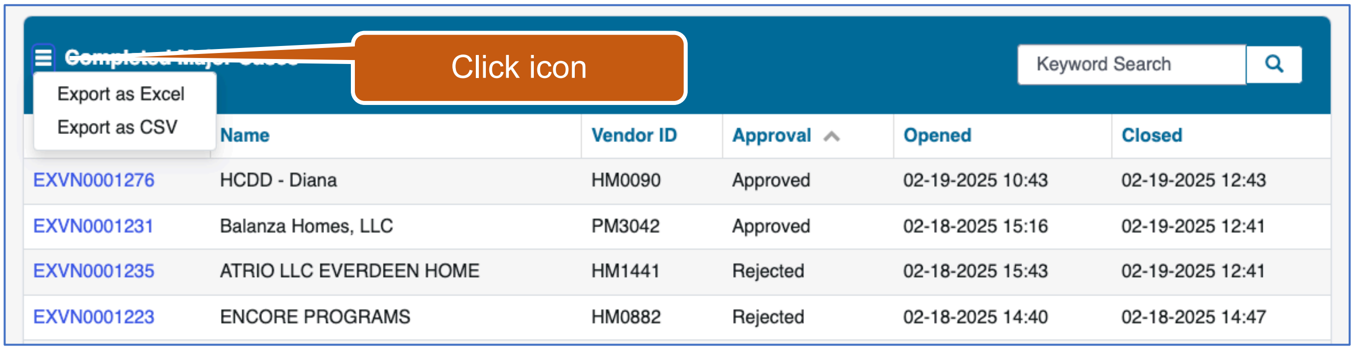


Figure 12: Export data

4:4 Filter and Sort Techniques – PD Vendor Records only

The PD Vendor Records table has additional sort and filter conditions, enabling you to customize to meet your personal preferences. When customizing filter and sort conditions, you will see all available fields on the table, regardless of their application to the Provider Directory.

Create Custom Filter – PD Vendor Records only

1. To add or remove a filter condition, click the filter icon at the top left corner of the table (Figure 13). A grey box will open and display the filter options.

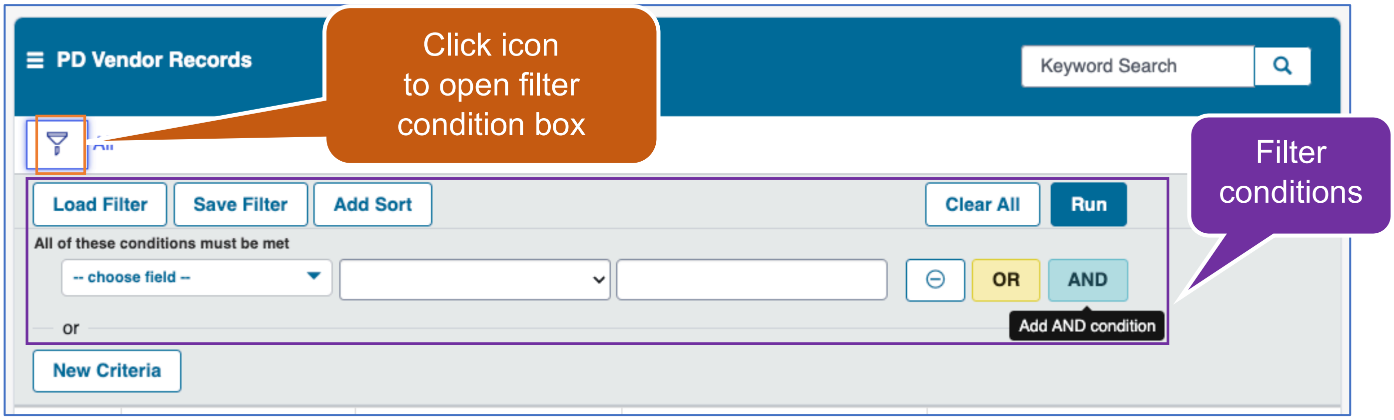


Figure 13: Open Filter and Sort Options

2. To **add** a filter condition, select a field from the pull down, select an operator, and add the desired filter condition (Figure 14).
   a. To add <u>another</u> filter condition, click "or" or "and" to open the filter conditions and add the conditions. When hovering over either "and" or "or" conditions, a black popup box will appear in accordance with the option (e.g., "Add AND condition").
   b. To <u>add an alternate</u> filter condition, click New Criteria button and complete the required fields.
3. Click the "Run" button to apply the filters.

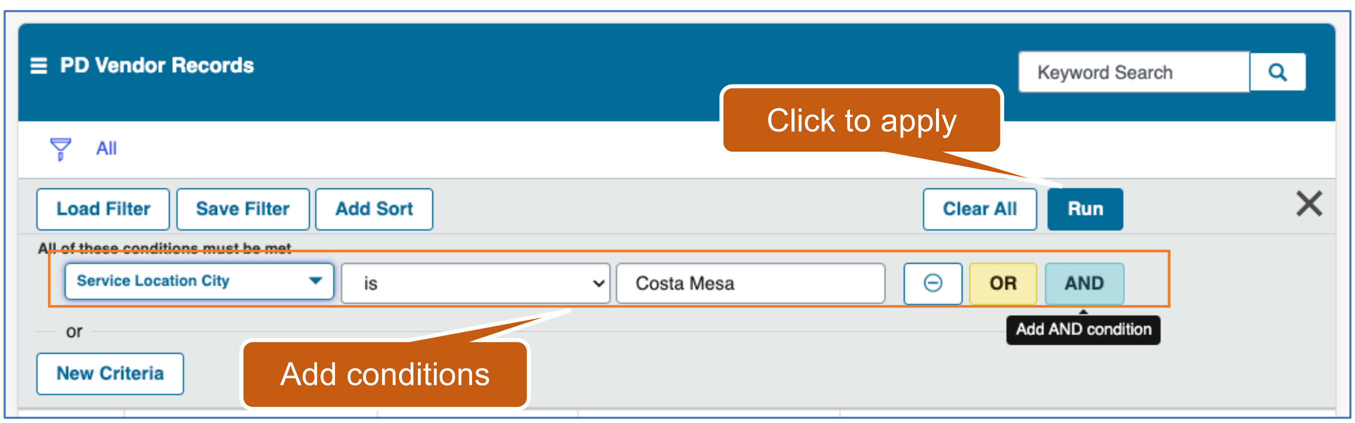


Figure 14: Add filter conditions

1. To **remove** a filter condition, hover over the circle with a slash in the middle. The box turns red and a black box popup appears that says, "Remove this condition" (Figure 15). Click the box to remove the filter condition.
2. Click the "Run" button to apply the change.

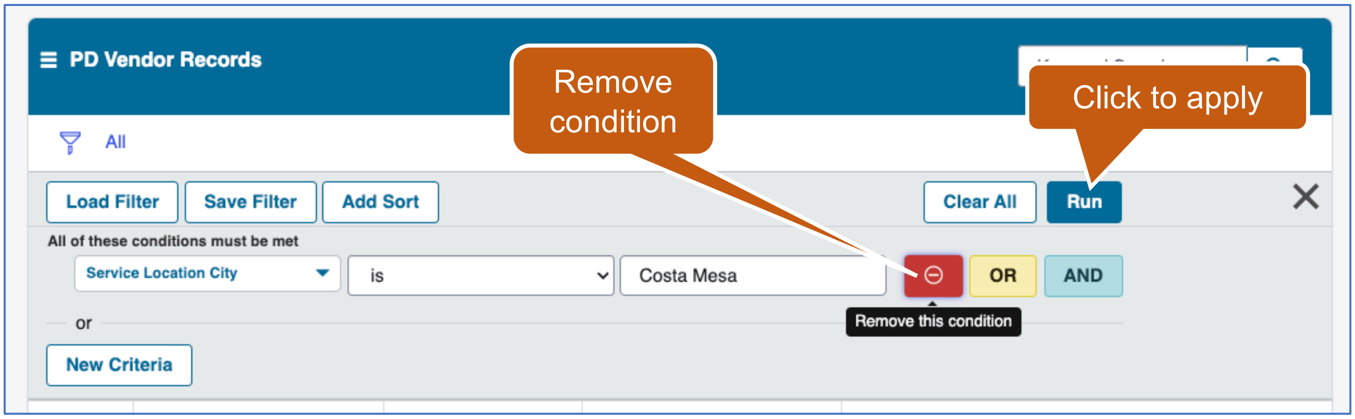


Figure 15: Remove filter condition

Save and Load Custom Filter – PD Vendor Records only

Save Custom Filter

Each time you create a custom filter and then switch to another tab, the table reverts to its original filters. You can save a custom filter to quickly return to your personalized view.

1. After creating a custom filter (see steps above in this module), click the filter icon again to open the filter conditions box (Figure 13).
2. Click “Save Filter” button (Figure 16).
3. Provide a filter name (Figure 17).
4. Click “Submit”.

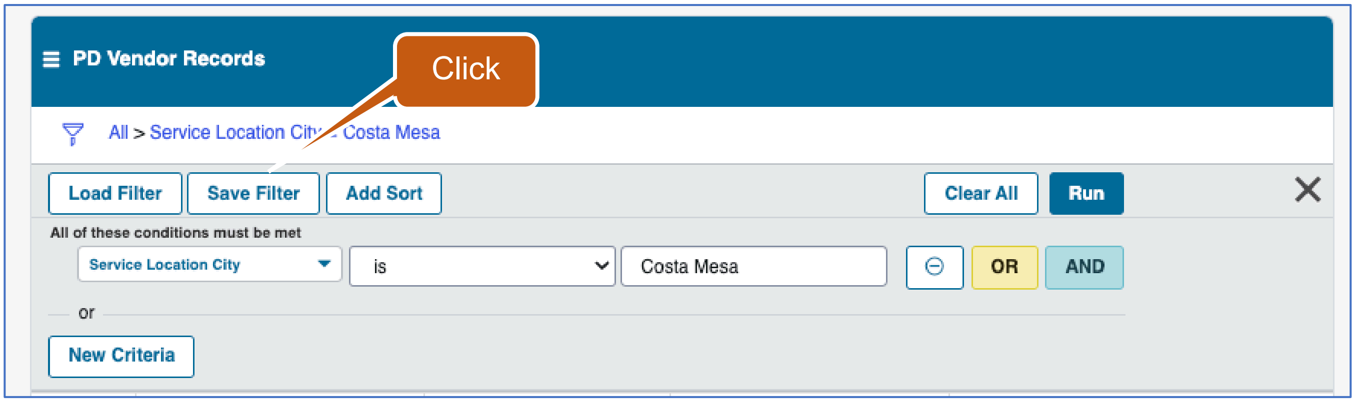


Figure 16: Save custom filter

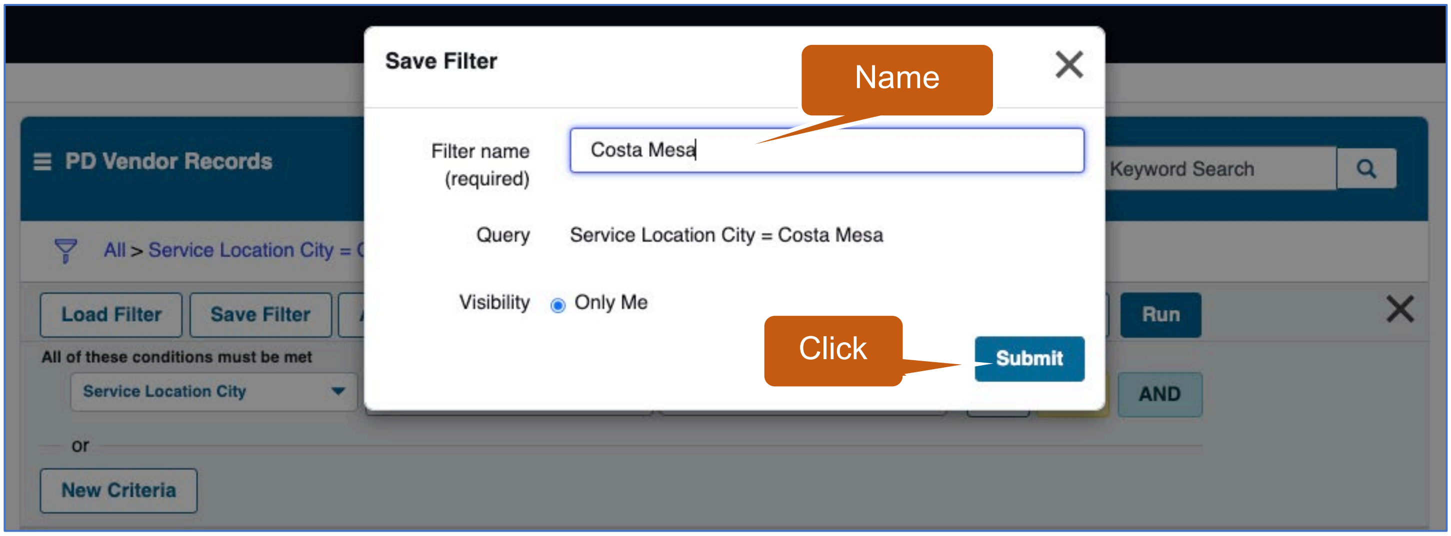


Figure 17: Save custom filter

Load Custom Filter

1. Select the PD Vendor Records tab.
2. Click the filter icon to open the filter condition box (Figure 13).
3. Click “Load Filter” button.
4. Select custom filter from the list (Figure 18) and the filtered list appears.

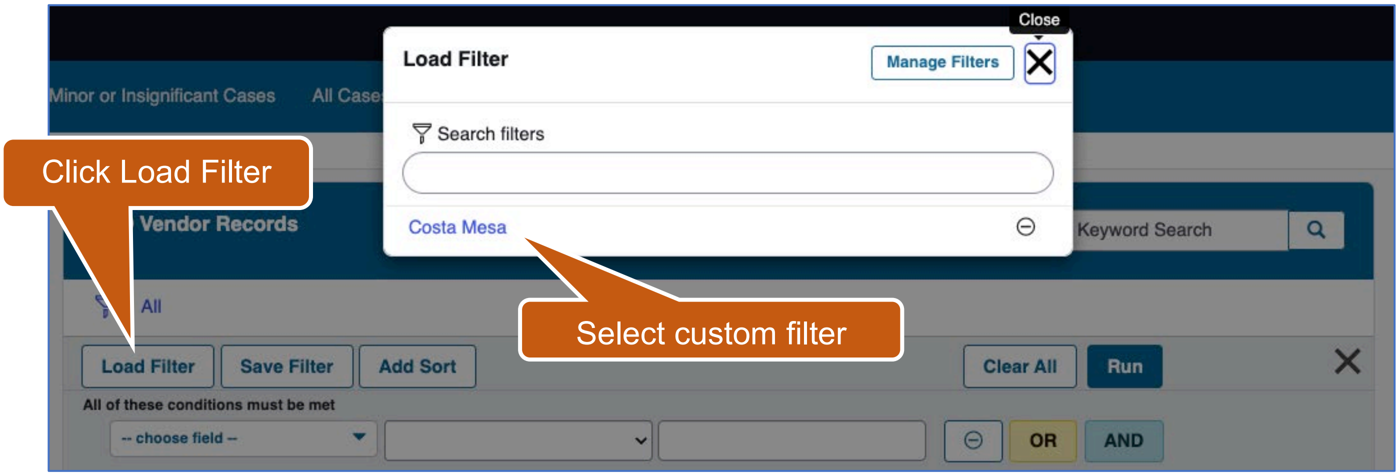


Figure 18: Load custom filter

Create Custom Sort – PD Vendor Records only

1. Select the PD Vendor Records tab.
2. Click the filter icon to open the filter condition box (Figure 11).
3. Click the “Add Sort” button. The Add Sort pop up window will appear (Figure 19). Select your desired field from the pull down.
4. Select an order option: “a to z” (ascending, oldest to newest) or “z to a” (descending, newest to oldest).
5. To add another sort condition, click the “+” (plus) button and repeat the process.
6. To remove a sort condition, click “**-**“ (minus) button.
7. Click the “Save” button to apply the change.

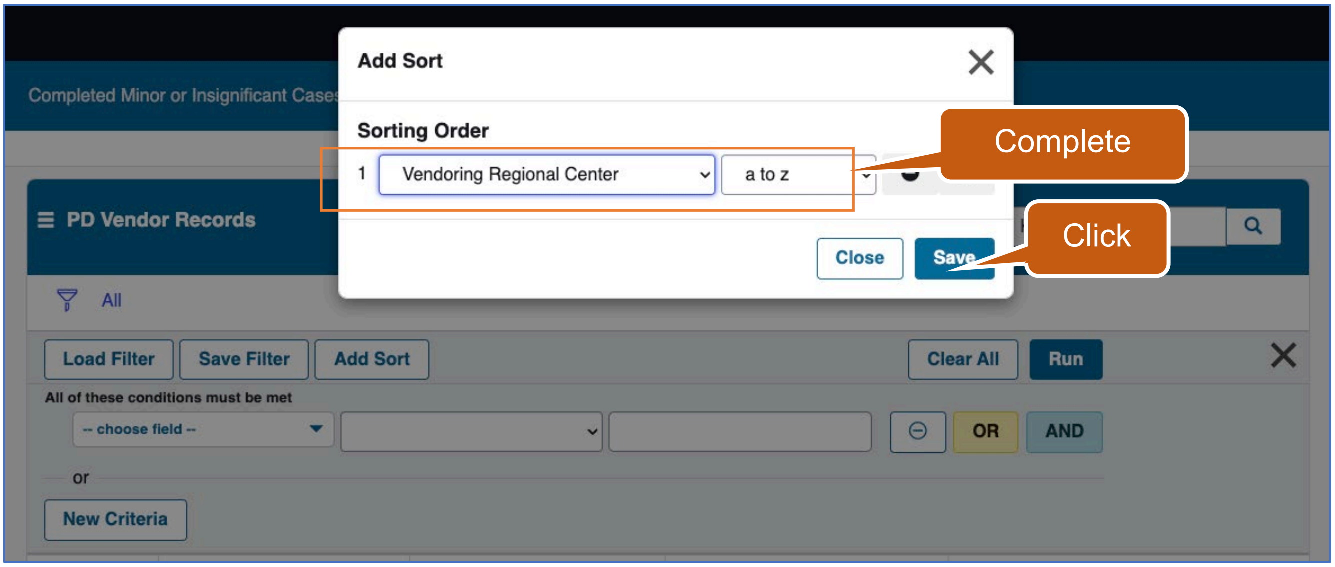


Figure 19: Add sorting condition(s)

QUESTIONS?

Email: ProviderDirectory@dds.ca.gov