How to use the Provider Directory Portal

SERVICE PROVIDERS

Created by the Department of Developmental Services for Service Providers

Version 2
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Department of Developmental Services

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How to Use this Guide

This guide provides step-by-step instructions to help you review, submit and track your vendor information. 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

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 Provider Directory home page.

> 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 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 your affiliated vendor name and contact email.

Hello ,

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

- Vendor Organization : Fabricated Services, Inc. - TEST TEST
- Vendor Contact Email : FredFaker2@fakeemail.com

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

Thank you.

DDS Department of Developmental Services

Unsubscribe | Notification Preferences

Figure 1: Registration Request Email

1:2 Access the Registration Form and Register

1. Click on the Self Registration link (Figure 1) in the email and you will be taken to the Vendor Self Registration form (Figure 2).
2. Once on the Vendor Self Registration form, enter the email listed in the invitation email.
3. “My Vendor Organization” will auto populate based on the email entered in step 2.
4. Review the Privacy Policy and Terms and Conditions and check the radio button to agree.
5. Click on “Sign Up” at the bottom of the page.

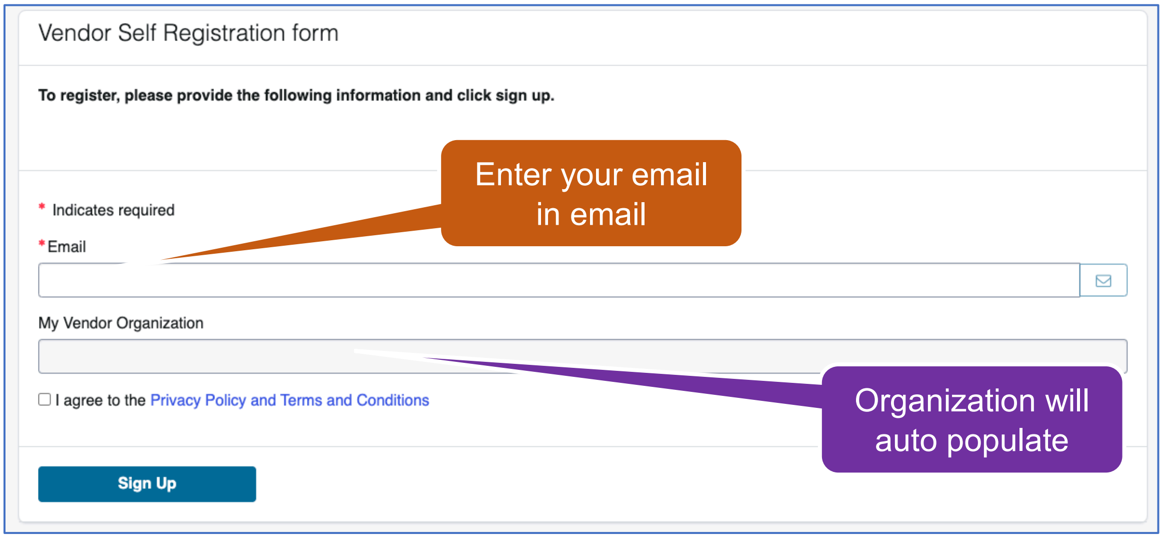


Figure 2: Vendor Self Registration Form

1:3 Set up a New Password

1. Following registration, you will receive a second email (Figure 3). Click on the link titled “DDS Vendor Portal”.
2. You will be directed to the reset password screen (Figure 4). Create a password that meets requirements.
3. Click “Reset Password” button.

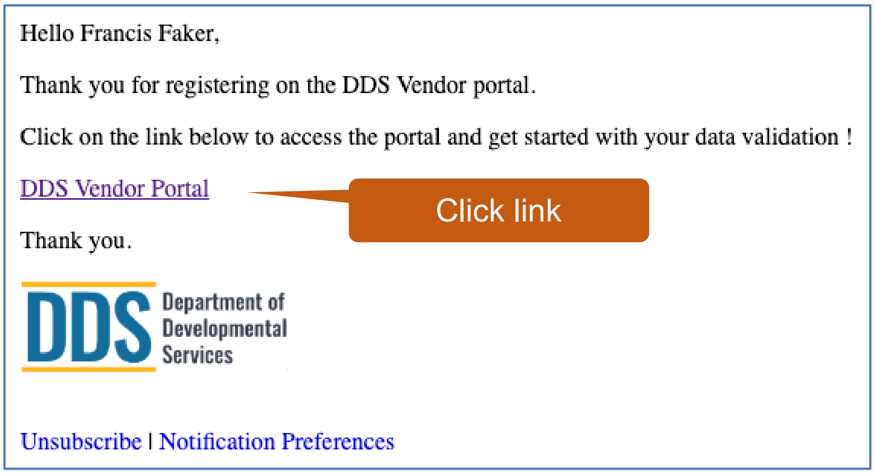


Figure 3: Registration Confirmation and Set Up Password Link Email

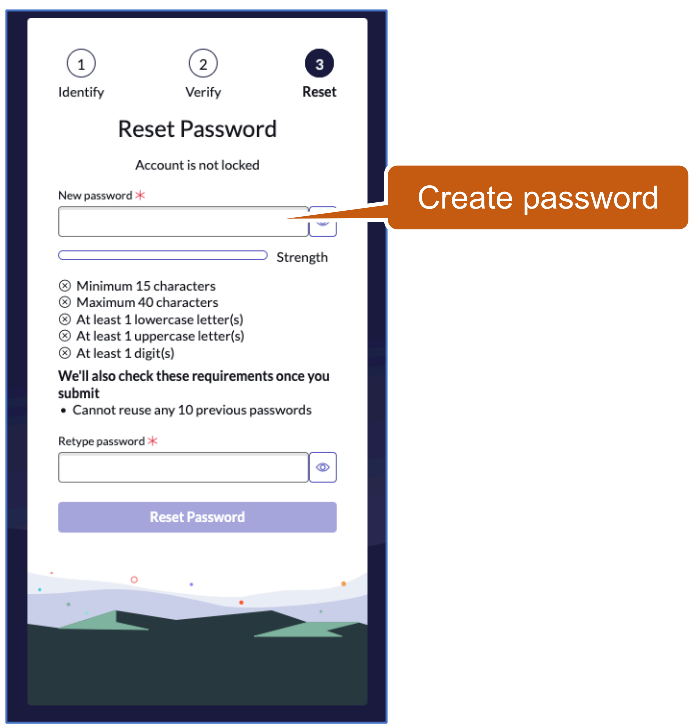


Figure 4: Password Set Up Screen

1:4 Log In

1. After your new password is set up, you will be directed to the Provider Directory Login screen (Figure 5).
2. Enter your email and the password that you created.
3. Click “Log in” button.

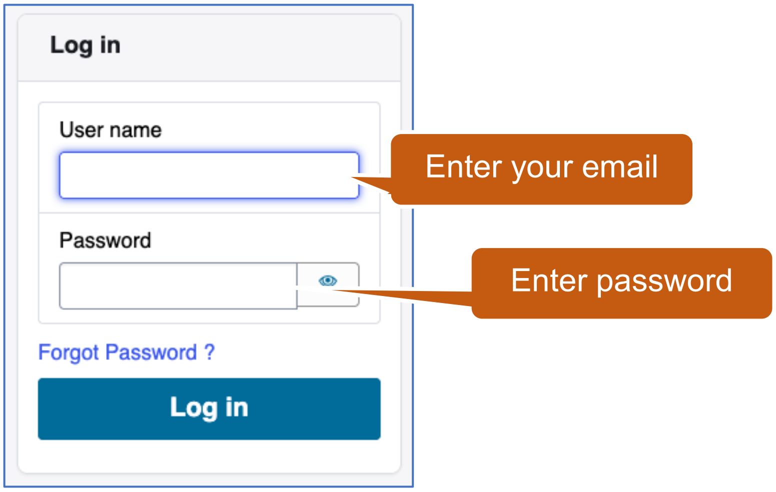


Figure 5: Provider Directory Login Screen

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

This module will walk you through logging into the Provider Directory and viewing confirmations and cases. It will also cover how to review, edit, and submit a case to a regional center for assessment.

2:1 Accessing Confirmations and Cases

A **Confirmation** contains information about the vendor pertinent to DDS. To keep this record relevant and up-to-date, service providers are empowered to view, edit, verify, and confirm it via the Provider Directory. Each record submission generates a case.

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. See 3:2 for information on viewing a pending request item.

Access the Provider Directory login page and log in:

1. Use the link provided in the invitation email or copy and paste https://caddsprod.servicenowservices.com/spd into your browser.
2. Log in with your email and password. You will be directed to "My Vendorizations," also referred to as the Provider Directory home page (Figure 6).

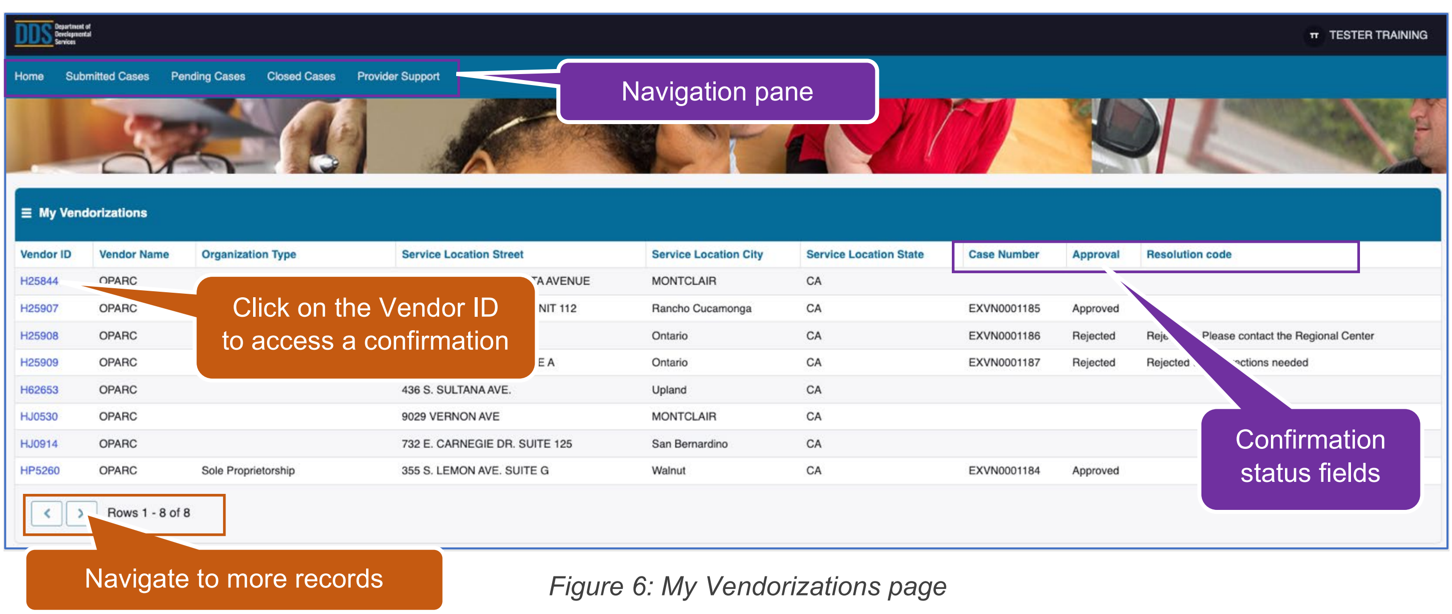


Figure 6: My Vendorizations page

Navigate and View Confirmations and Cases:

The Provider Directory includes several tables to help make your work in the Directory easy. The contents of each table are summarized below.

Table Name	Contents of Table
Home/My Vendorizations	All vendor records (a.k.a., confirmations) that belong to a parent organization.
Submitted Cases	Cases submitted by the service provider, including cancelled cases.
Pending Cases	Cases and Requests Items, as applicable, submitted and awaiting review and approval or rejection by the regional center.
Closed Cases	Cases submitted by the service provider, including cancelled, with an approved or rejected status.
Provider Support	Tools to manage Provider Directory user access.

1. Select the desired tab from the navigation pane at the top of the My Vendorizations page (Figure 6).
2. To view an individual confirmation, click the vendor number link in the first column. The window that opens will differ based on which tab you were on when you clicked the link.

“**Parent organization**” is defined as the owning entity of one or more vendorizations. Parent organization is also the data custodian and is responsible for maintaining accurate vendor data.

2:2 Confirmation Statuses

!

My Vendorizations table lists all your vendor records, referred to as confirmations, that are associated with your parent organization.

Each confirmation has a status, which can be viewed in the Approval column shown in Figure 6. Most confirmations without an approval status (i.e., blank) are awaiting submission by the service provider. Confirmations with a pending request item (RITM) will also be blank. All other confirmations were previously submitted, assigned a case number, and are open, closed or locked to further editing.

Approval status	**Scenario(s)**	**Ability to edit and submit change**
(Blank)	• Awaiting service provider review and submission • Pending RITM awaiting regional center review	Open Locked
Approved	• Service provider submitted no changes • Service provider submitted only minor or insignificant change(s) and system approved request automatically • Service provider submitted major change(s) and regional center approved request	Open
Requested	• Service provider submitted major change(s) and is awaiting regional center review and approval or rejection	Locked until regional center decision
Rejected with corrections needed	• Service provider submitted major change(s) and regional center rejected it and requested corrections with resubmission	Open
Rejected – Please contact the regional center	• Service provider submitted major change(s) and regional center rejected it and asked for service provider to contact the regional center	Closed – cannot resubmit

To make searching for a record easier, use the sort feature. To sort by approval status, click on Approval column title. Confirmations or cases will be sorted alphabetically (A to Z). Click the title again to reverse the sort condition (Z to A).

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 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 **only** makes “Minor” change(s) and submits, the change is automatically approved. This confirmation’s approval status will change from blank to “approved” on the My Vendorizations page and will be recorded in the Closed Cases page.

“Major” changes are those that include changes to any or all 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 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 Submit with No Changes

1. Navigate to the My Vendorizations table (Figure 6).
2. Identify an editable confirmation by reviewing the confirmation status fields (Figure 7) - exclude confirmations with an Approval status of “requested” or “rejected – please contact the regional center.” Note: Confirmations with a pending request (RITM) will be blank and cannot be edited.

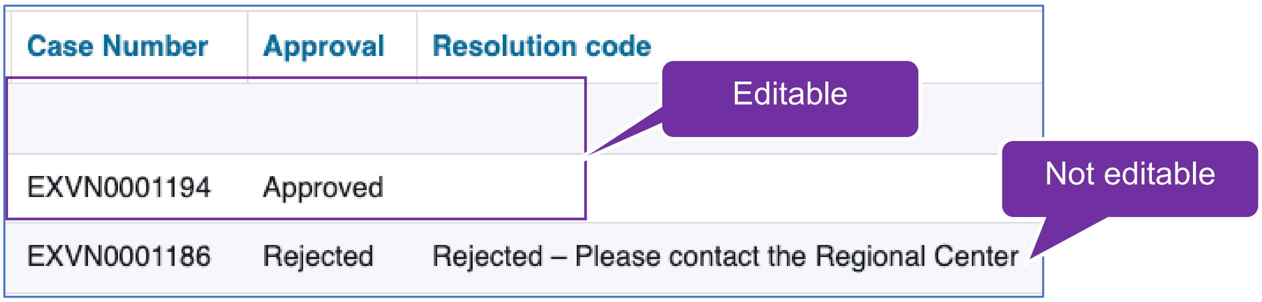


Figure 7: Confirmation Status Fields

3. Click the associated vendor ID link in the first column. This will take you to a Vendor Data screen (Figure 8).

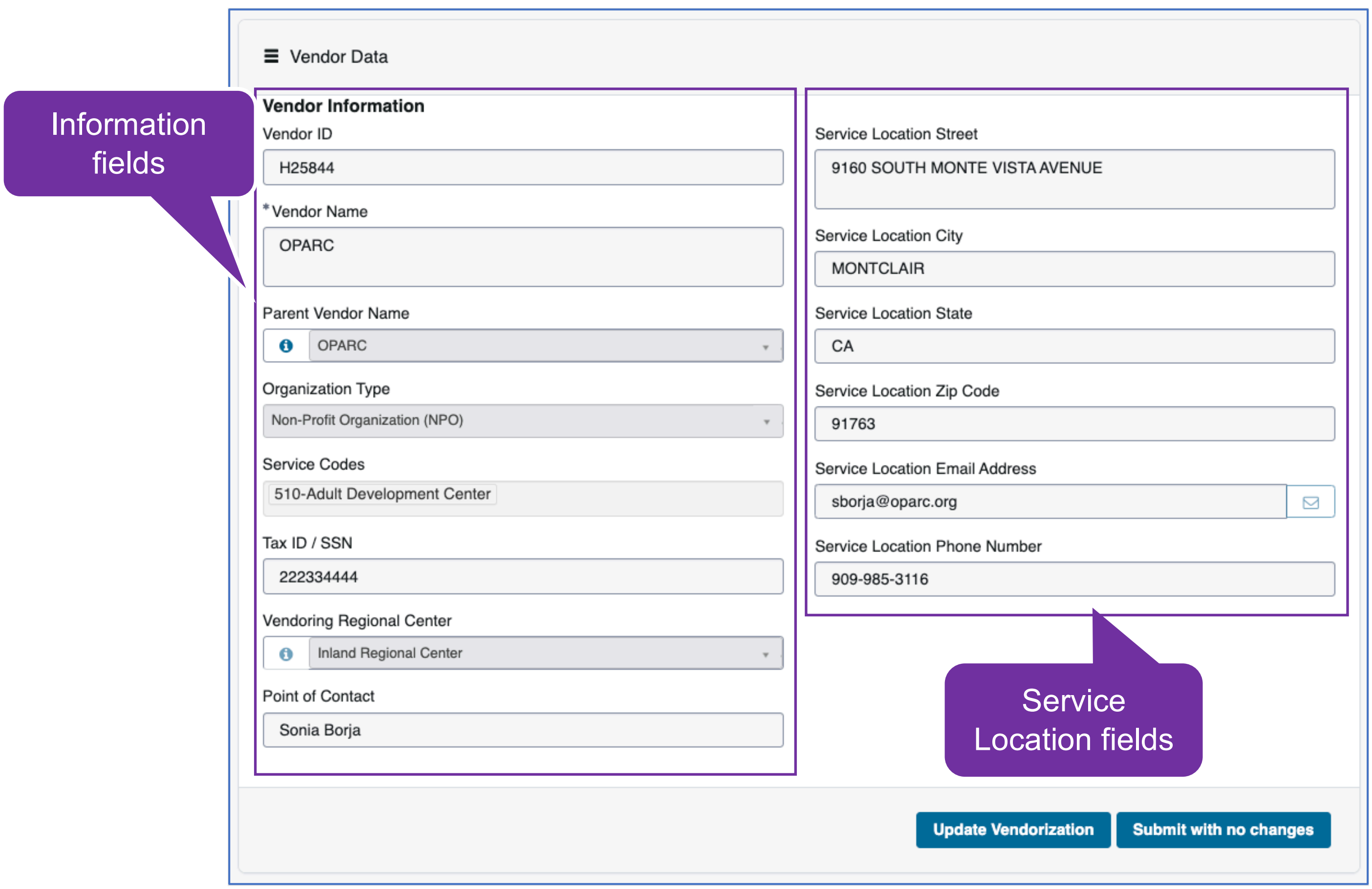


Figure 8: Vendor Data Screen

4. Review the information provided.
5. If the information is accurate and complete, click the “Submit with no changes” button. (If inaccurate or incomplete, see section 2:5)

A pop-up message will appear thanking you for the submission. On the My Vendorizations page, a case number will be added to the record and the status will change to “Approved.” The case will also be listed on the Submitted Cases and Closed Cases tables.

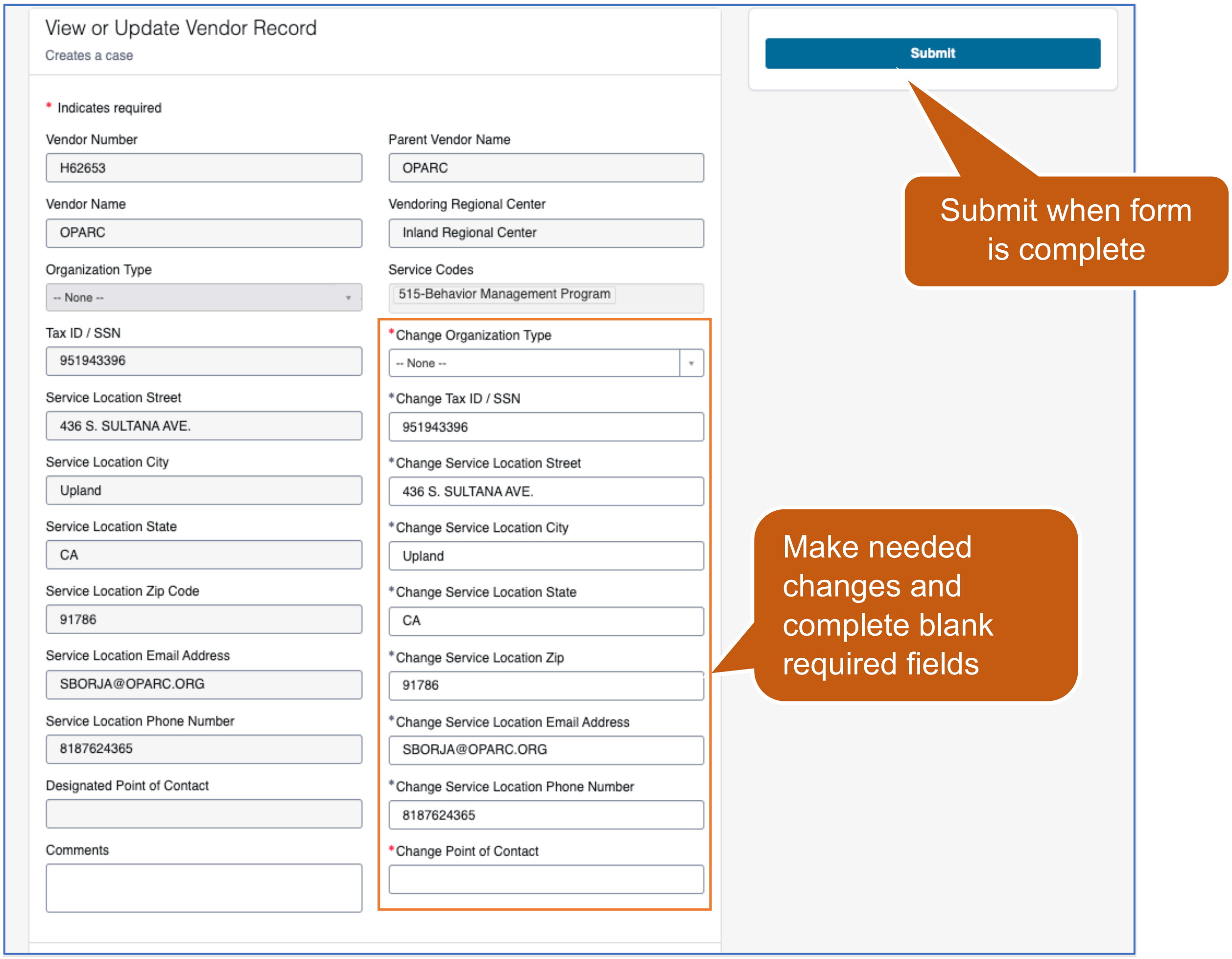
Note: The Vendoring regional center will not be notified, but the case will be added to their completed “minor or insignificant” cases table.

2:5 Submit with Changes

1. Navigate to the My Vendorizations table (Figure 6).
2. Identify an editable confirmation by reviewing the confirmation status fields (Figure 7) - exclude confirmations with an Approval status of “requested” or “rejected – please contact the regional center.” Note: Confirmations with a pending request (RITM) will be blank and cannot be edited.
3. Click the associated Vendor ID link in the first column. This will take you to a Vendor Data screen (Figure 8). If any information is incomplete, a banner at the top of page will appear - “All fields are required. Some fields have issues. Please update vendorization.”
4. Click on the “Update Vendorization” button and you will be taken to the Update Vendor Record screen (Figure 9). You will see populated editable and non-editable fields:
    a. Non-editable fields have a grey background.
    b. Editable fields have a white background. Required fields are pre-populated with the original data values.
5. Make any needed changes to the editable fields and populate any blank required fields (marked with an asterisk “*”).
6. Click “Submit” when completed.

A pop-up message will appear thanking you for the submission. Subsequent actions are dependent on type of change.

- If the change request is “Minor,” the Provider Directory approves the submission automatically and sends an email notification confirming the submission.
- If the change request is “Major”, you will receive an email notification confirming your submission, a case number will be assigned, the approval status will change to “Requested.”



View or Update Vendor Record

Creates a case

* Indicates required

Vendor Number	H62653	Parent Vendor Name	OPARC
Vendor Name	OPARC	Vendoring Regional Center	Inland Regional Center
Organization Type	-- None --	Service Codes	515-Behavior Management Program
Tax ID / SSN	951943396	*Change Organization Type	-- None --
Service Location Street	436 S. SULTANA AVE.	*Change Tax ID / SSN	951943396
Service Location City	Upland	*Change Service Location Street	436 S. SULTANA AVE.
Service Location State	CA	*Change Service Location City	Upland
Service Location Zip Code	91786	*Change Service Location State	CA
Service Location Email Address	SBORJA@OPARC.ORG	*Change Service Location Zip	91786
Service Location Phone Number	8187624365	*Change Service Location Email Address	SBORJA@OPARC.ORG
Designated Point of Contact		*Change Service Location Phone Number	8187624365
Comments		*Change Point of Contact	

Submit

Figure9: 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.

3:1 View Submitted Requests

1. Navigate to the Provider Directory Home page (Figure 6).
2. Click on "Submitted Cases" tab from the navigation pane at the top of the page.
3. In the Submitted Cases table (Figure 10), view the request's approval status in the "Approval" column. "Resolution code" may provide additional information about the regional center response.

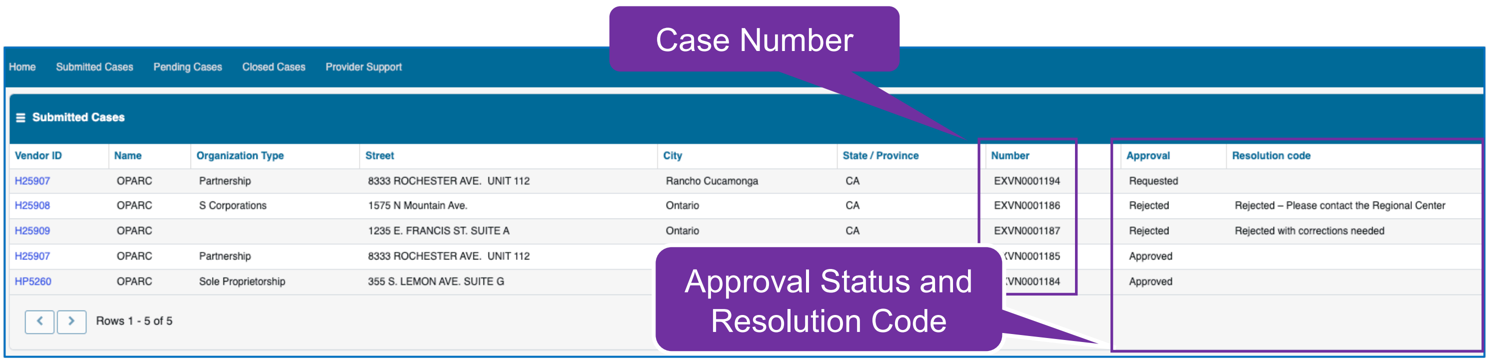


Figure 10: Submitted Confirmations Table

4. For further information, click on the Vendor ID link in the first column to be directed to the View or Update Vendor Record screen (Figure 11).

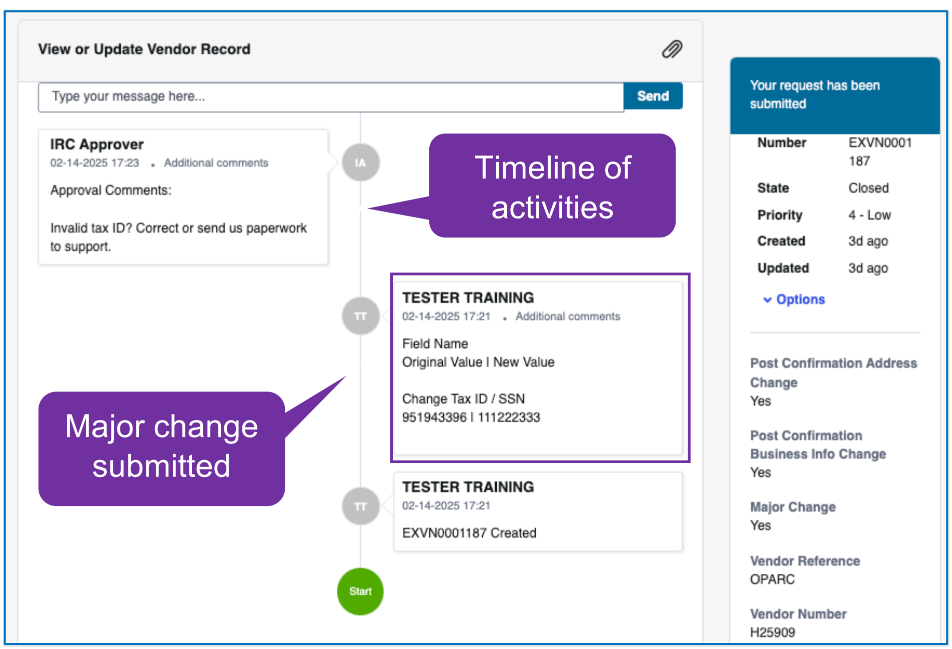


Figure 11: View or Update Vendor Record Screen

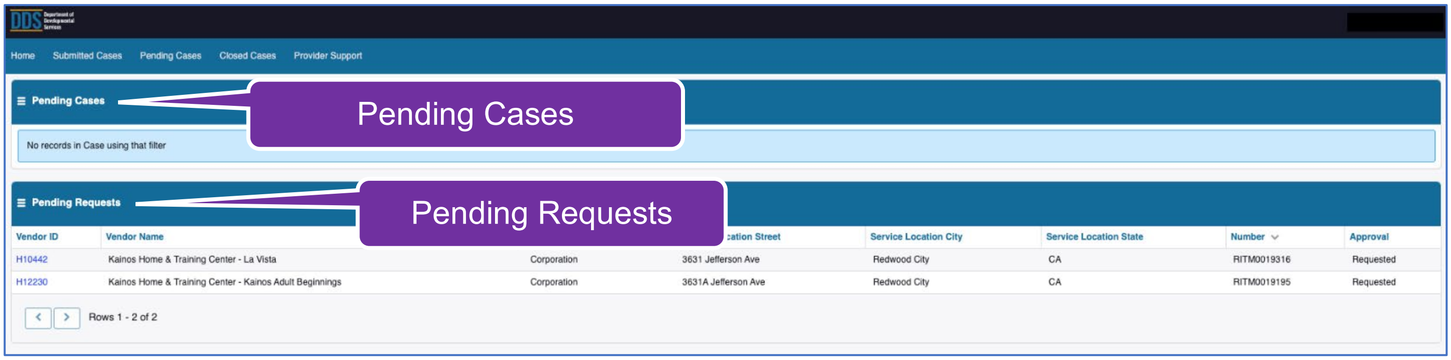
3:2 View Pending Case or Request Item

A pending case (EXVN) and request item (RITM) is a service provider request awaiting a regional center decision.

Pending cases can be found on both the submitted case and pending case tabs. On the Pending case table, they will be listed in the top table, labeled “Pending Cases.”

Pending request item (RITM), can only be found on the Pending Cases tab. If applicable, a pending request will be shown in the bottom table, labeled “Pending Requests” and have a RITM number in the column labeled “Number.”

1. Navigate to the My Vendorization page (Figure 6).
2. Click on the "Pending Cases" tab using the navigation pane.
3. Scroll down to applicable table to locate record awaiting regional center decision.
4. Click Vendor ID link in the first column to open record.



3:3 Cancelling a Pending Change Request

> **!** A change request can only be cancelled when the request is "Major" and the state is "open."

1. Navigate to the My Vendorization page (Figure 6).
2. Click on the "Pending Cases" tab using the navigation pane. Note: Although you can access the requested confirmation from the My Vendorizations page, you cannot access the view or update vendor record screen from that view. You must open the case from the Pending Cases tab.
3. Select the pending change request by clicking on the Vendor ID link in the first column. You will be taken to the View or Update Vendor Record screen (Figure 12).
4. Click on the "Cancel Case" button.

You will see a pop-up confirmation message indicating the request has been successfully cancelled. The case is closed and will appear in submitted and closed case tables with an approval status of rejected. The confirmation can be resubmitted from My Vendorization page.

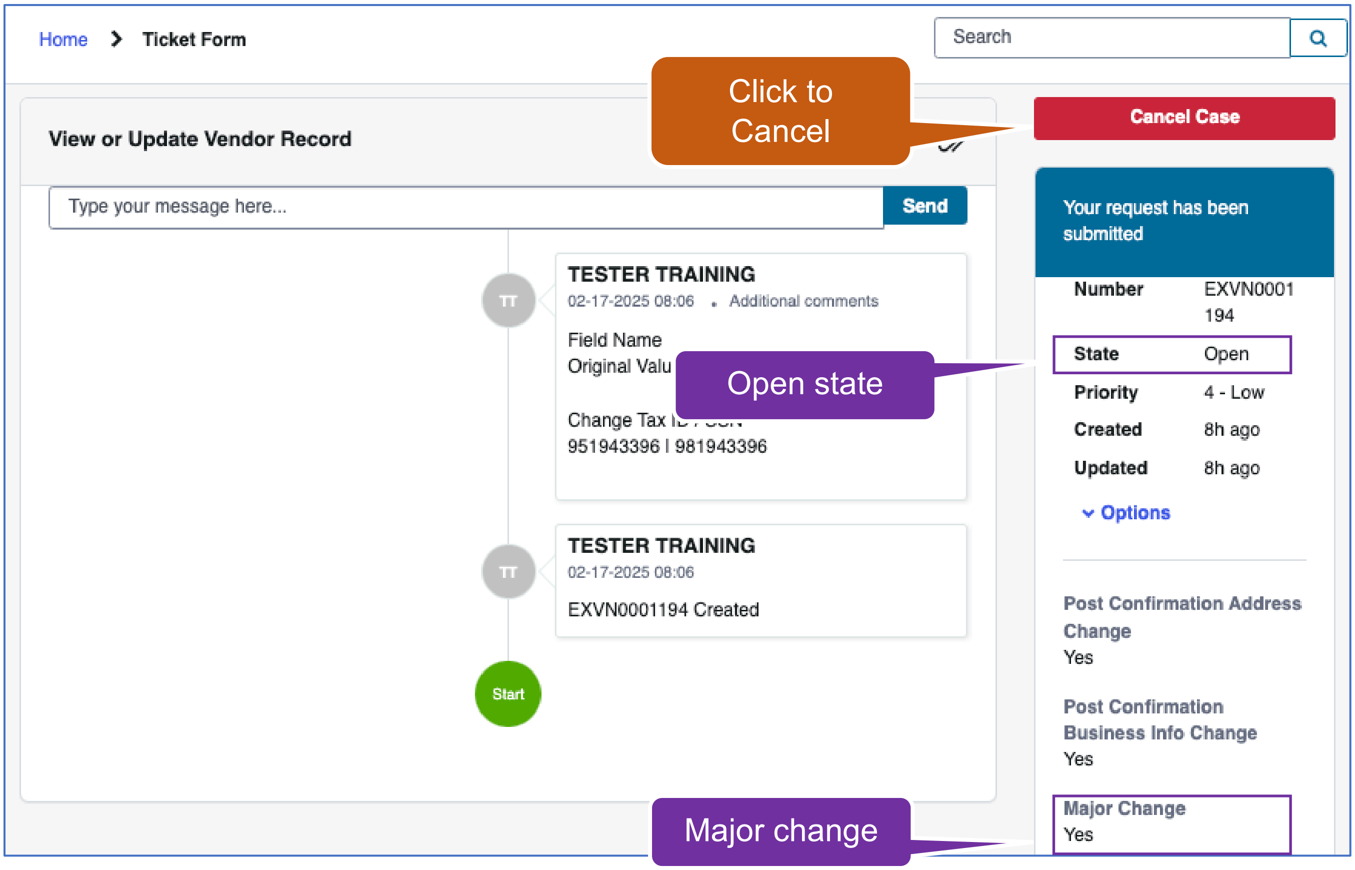


Figure 12: View or Update Vendor Record Screen with an Option to Cancel

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

When a request is rejected, an email notification will be sent to the service provider and information on why the request was rejected will be posted in the timeline of the View or Update Vendor Record screen (Figure 13).

1. Navigate to the My Vendorizations table (Figure 6).
2. Click on "Submitted Cases" tab using the navigation pane.
3. Locate the request with the rejected status by looking at the "Approval" column (Figure 9). You will see three possible reject statuses:
    a. Rejected – Please contact the regional center
    b. Rejected – (no resolution code)
    c. Rejected – Rejected with corrections needed
4. For the rejected request, click the Vendor ID link in the first column to be directed to the View or Update Vendor Record screen.

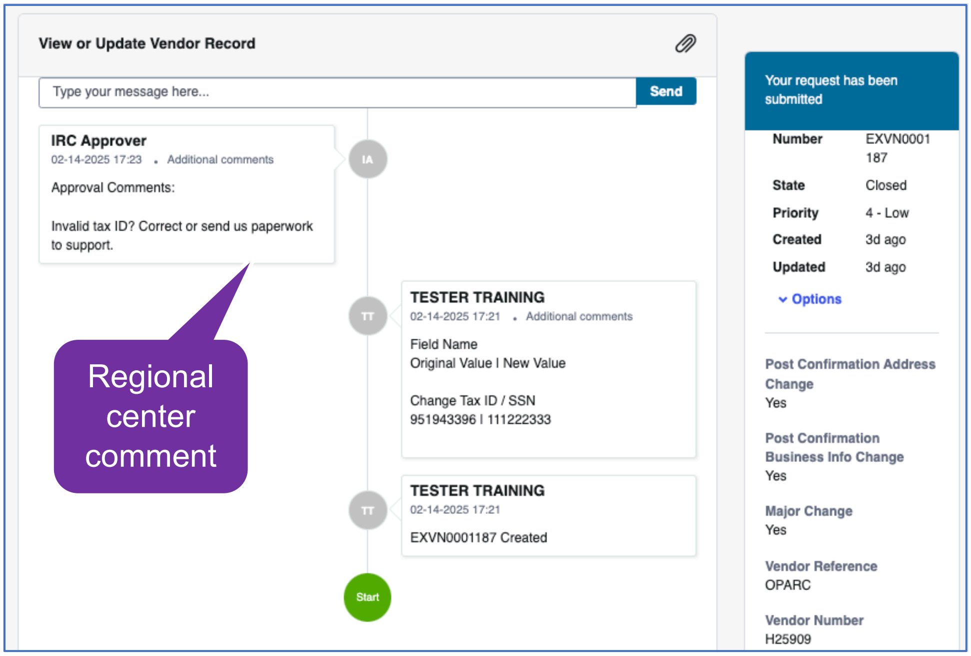


Figure 13: View or Update Vendor Record Screen Timeline

4:2 Resubmitting a Rejected Request

1. If the resolution code is "Rejected with corrections needed" the case is closed.
    a. Select the case in the Closed Cases table and review comments and/or attachments (Figure 13) to know what corrections the regional center requests.
    b. Navigate to My Vendorizations page and locate the associated vendor ID.
    c. Click the Vendor ID link and follow steps in section 2.5 to submit with changes.
2. If there is no resolution code (blank), the case is closed. It was cancelled by the provider before it could be reviewed by the regional center. The comment will be "case was cancelled by the provider."
    a. Navigate to My Vendorizations page and locate the associated vendor ID.
    b. Click the Vendor ID link and follow steps in section 2.5 to submit.
3. If the resolution code is "Rejected – Please contact the regional center" the case and confirmation are closed. No edits can be made.
    a. Select the case in the Closed Cases table and review comments and/or attachments (Figure 13) to view the regional center's explanation.
    b. Contact the regional center to take an action outside of the Provider Directory following existing regional center procedures.

Module 5 - Add Comments and Attachments

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

1. Navigate to the My Vendorizations page (Figure 6).
2. Click on "Submitted Cases" tab using the navigation pane.
3. Click on the Vendor ID link for the case you want to add comments or attachments to. You will be taken to the View or Update Vendor Record screen (Figure 14).
4. To add a message, type in the dialog box at the top of the screen and click "Send." To add an attachment, click on the paper clip icon and follow the steps.
5. The comment and/or attachment will be posted in the timeline.

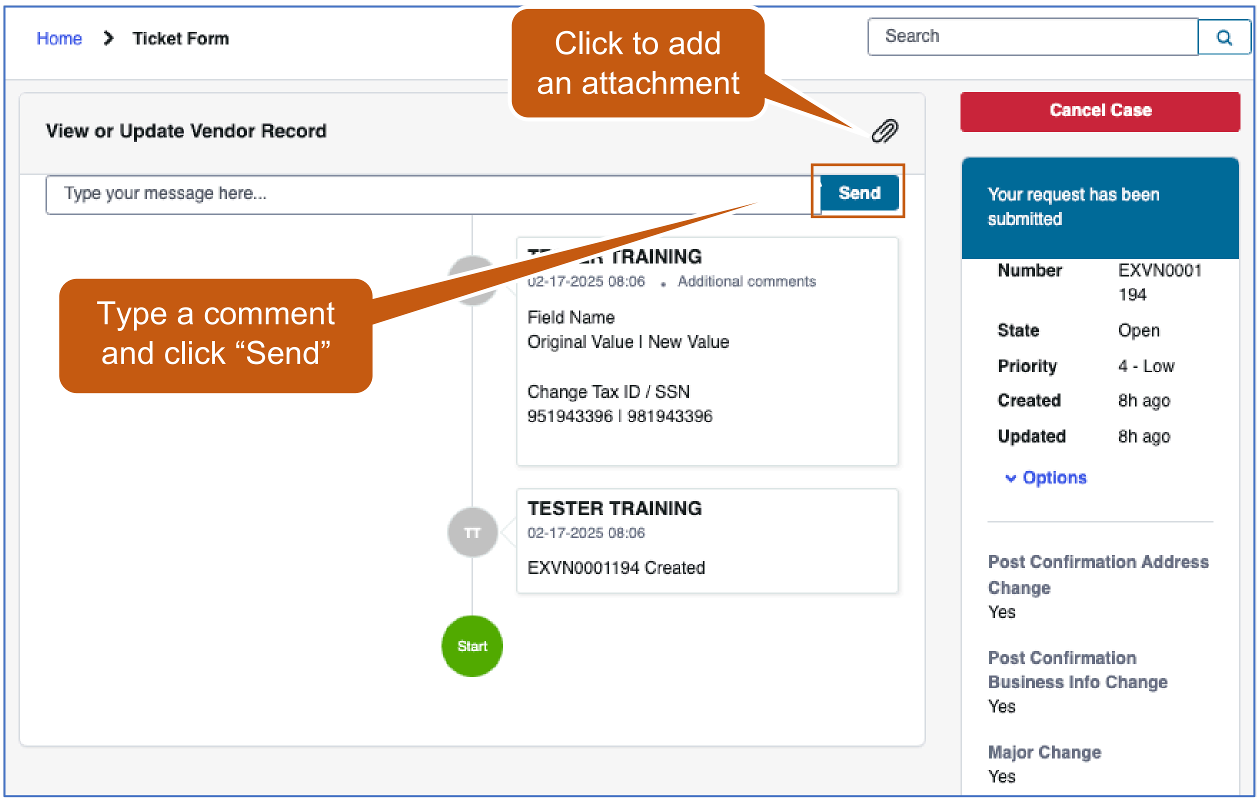
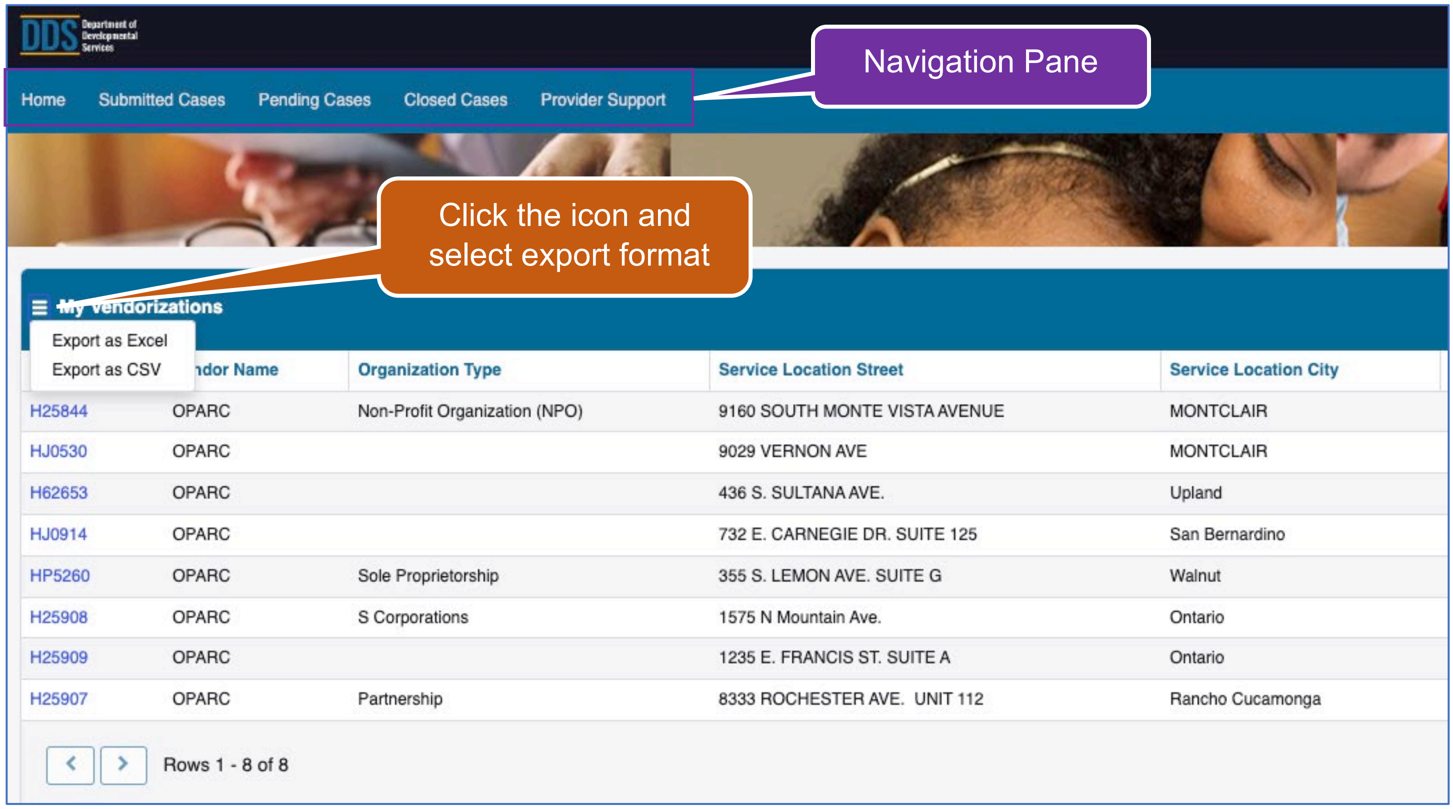


Figure 14: Add Comments or Attachments

Module 6 - Export Data

Each table can be exported in an Excel or CSV file format.

1. Select a table from the navigation pane.
2. Click on the hamburger icon in the top left corner of the table. (Figure 15)
3. Select your desired export format: Excel or CSV.
4. The exported report will appear in your downloaded files, or wherever your downloads are stored.



	ndor Name	Organization Type	Service Location Street	Service Location City
H25844	OPARC	Non-Profit Organization (NPO)	9160 SOUTH MONTE VISTA AVENUE	MONTCLAIR
HJ0530	OPARC		9029 VERNON AVE	MONTCLAIR
H62653	OPARC		436 S. SULTANA AVE.	Upland
HJ0914	OPARC		732 E. CARNEGIE DR. SUITE 125	San Bernardino
HP5260	OPARC	Sole Proprietorship	355 S. LEMON AVE. SUITE G	Walnut
H25908	OPARC	S Corporations	1575 N Mountain Ave.	Ontario
H25909	OPARC		1235 E. FRANCIS ST. SUITE A	Ontario
H25907	OPARC	Partnership	8333 ROCHESTER AVE. UNIT 112	Rancho Cucamonga

Figure 15: Export Table

Module 7 - Password Reset

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

> **!** The Provider Directory automatically requests a **password change** 180 days after the last password was created. 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.

1. Navigate to the Provider Directory login page (Figure 5).
2. Click on the "Forgot Password?" link. This will take you to the reset password screen (Figure 16).
3. On 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”.

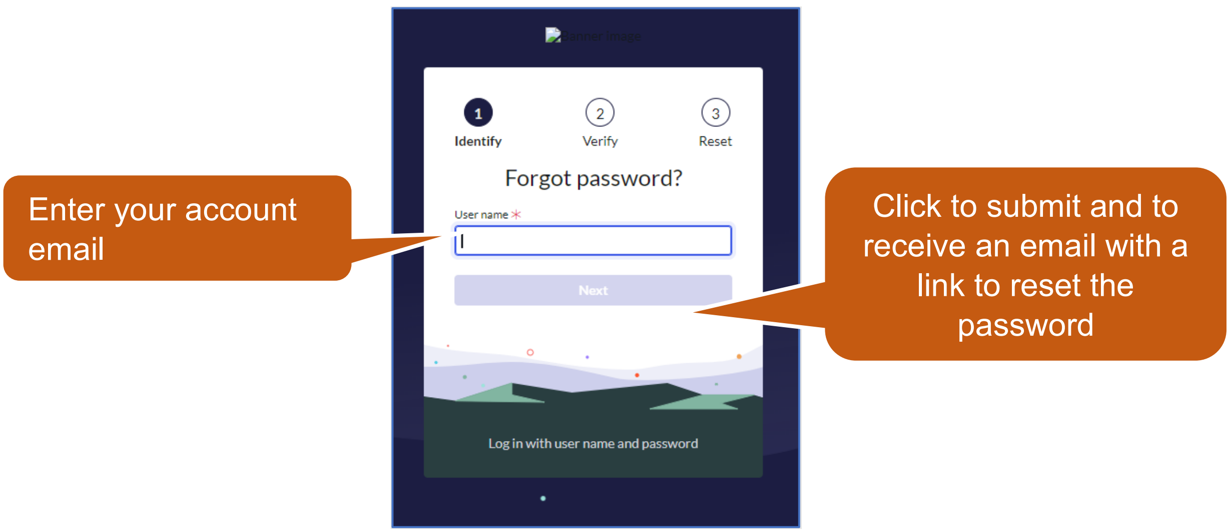


Figure 16: Reset Password Screen

1. You will receive an email with a Password Reset link.
2. Click on the link in the email and enter new password on the password reset page (Figure 4). You will be directed to the Provider Directory Login page.
3. Login to the Provider Directory with the new password.

Module 8 - User Management

This module will walk you through how to add or remove users and assign roles.

> PD Provider Admin can assign users one of three roles:
>
> 1. PD Provider Admin: Can add and remove other users, as well as update and confirm vendor data.
> 2. PD Change Requestor: Can update and confirm vendor data.
> 3. PD Read Only: Can view data.
>
> If you're unsure who has been assigned a PD Provider Admin role, contact your admin or email **ProviderDirectory@dds.ca.gov**.

1. Click on the "Provider Support" tab. This will take you to the PD - User Management table (Figure 17).

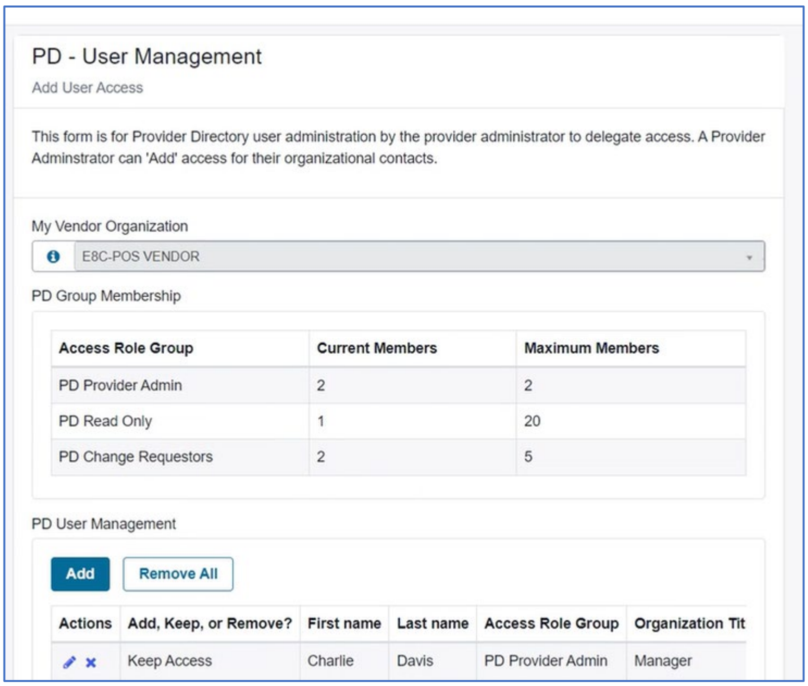


Figure 17: PD - User Management

2. In the PD - User Management table, you can add or remove a user.
    a. To add a user, click add button (Figure 17). In the popup window (Figure 18), complete all required fields (marked with red *) and click the "Add" button. Click **Submit** in the top right corner on the subsequent page (Figure 20) to add the user. If you forget to submit, you will be prompted to cancel your action or leave the page. If you leave, the change will be not applied.

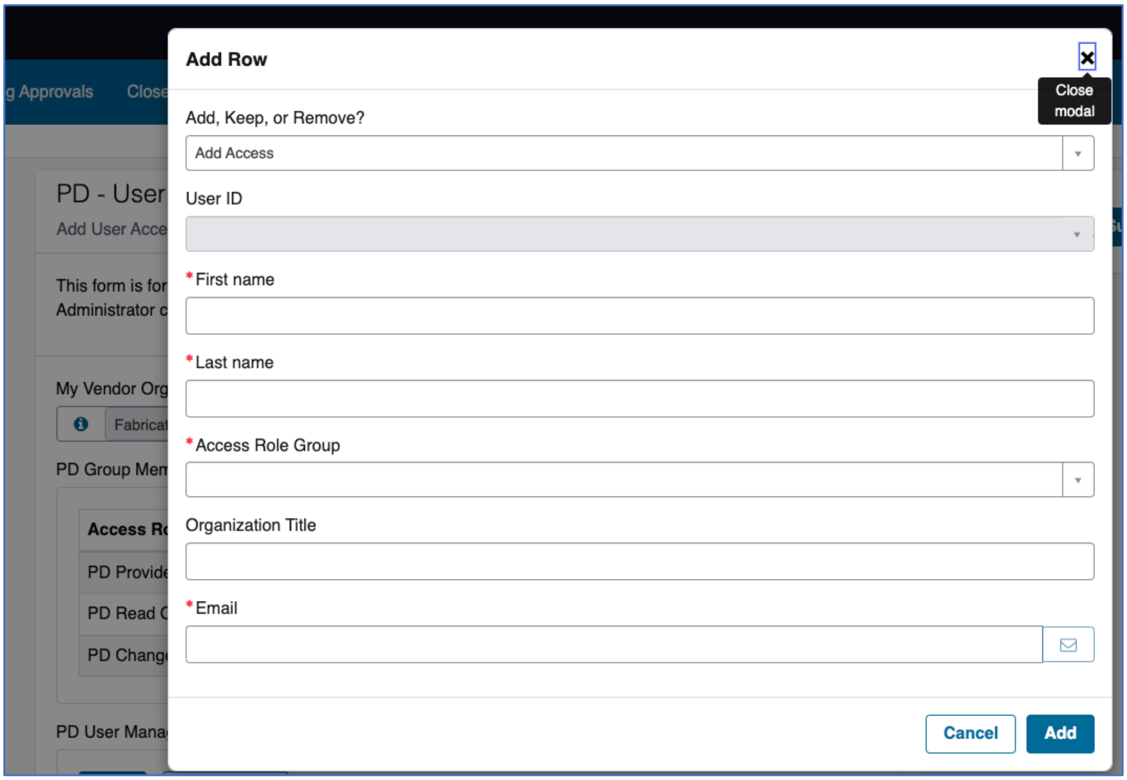


Figure 18: Add a user

    b. 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 on the subsequent page (Figure 20) to remove the user. If you forget to submit, you will be prompted to cancel your action or leave the page. If you leave, the change will be not applied.

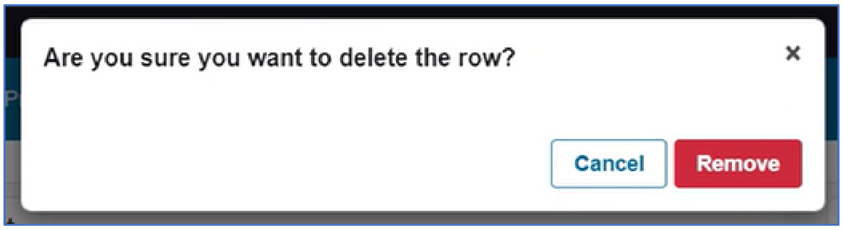


Figure 19: Remove a user

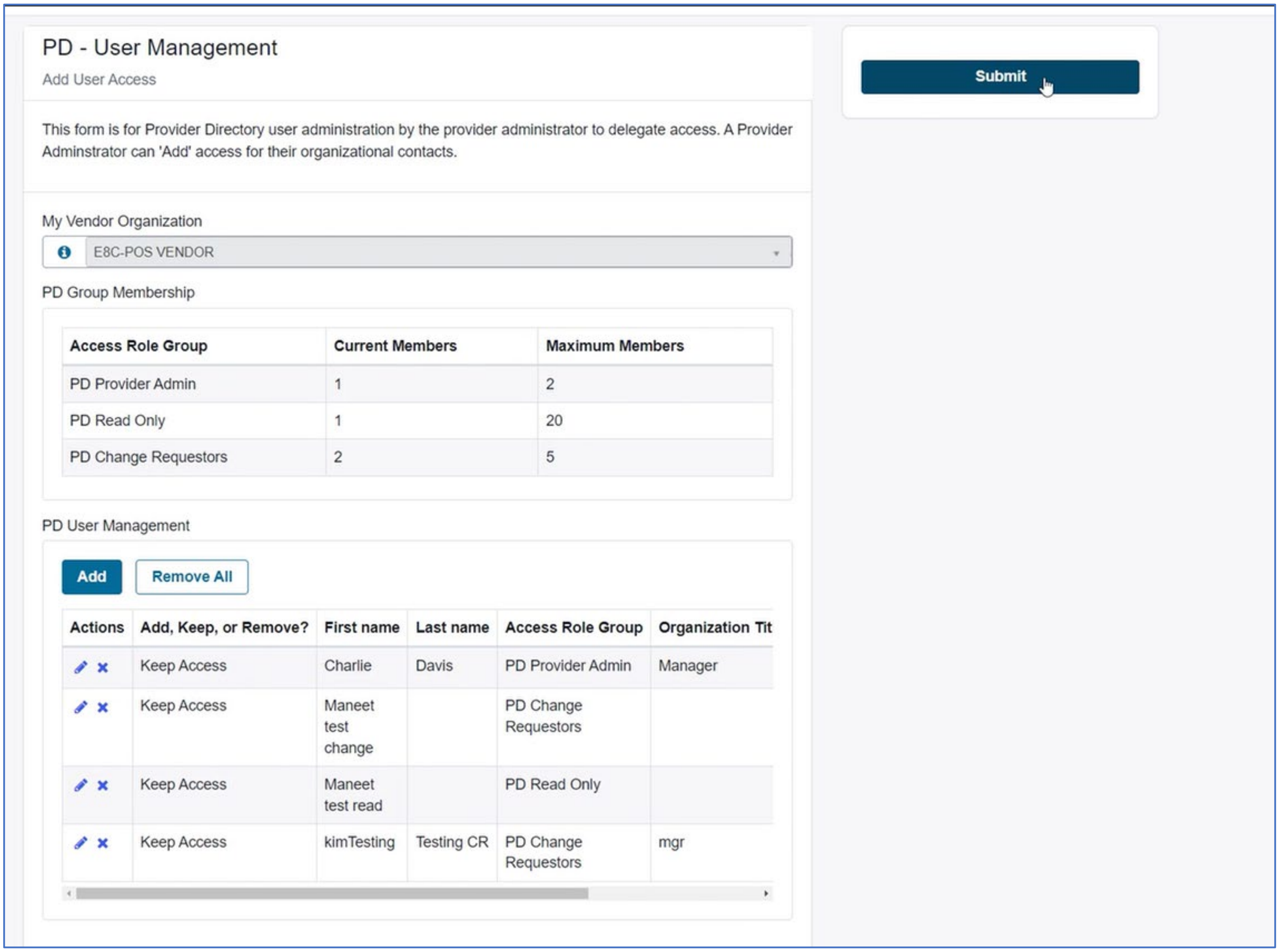


Figure 20: Submit a PD User change

There may be a delay between submission and viewing the change. Please wait and/or refresh the screen before re-submitting.

QUESTIONS?

Email: ProviderDirectory@dds.ca.gov