How to use the Provider Directory

APPLICANTS & SERVICE PROVIDERS

Created by the Department of Developmental Services for Service Providers

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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 log in to Provider Directory. 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

= Callout = Look here

Colored callouts

Action = Action to be taken

Information = Information

APPLICANTS & SERVICE PROVIDERS

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

Module 1 – Access Provider Directory

This module will walk you through how to register and log in to the Provider Directory.

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 Register and Log In

Determine which of the following scenarios best describes your situation. Follow the appropriate next step.

	Scenario 1	Scenario 2	Scenario 3	Scenario 3
I am a(n)…	Existing provider in PD with PD account	Existing provider in PD **without** a PD account	Existing provider not yet in PD	New, potential provider
My next step is…	Login with email and password	Contact your organization's **PD Provider Admin*** to request invite to register	Register	Register

**See Module 6 for definition of PD Provider Admin.*

Scenario 1: Login

Open a browser and go to: https://caddsprod.servicenowservices.com/spd by pasting into the search bar. You will be taken to the Log in page (Figure 1.2). Enter your username and password and click Log in.

a. Your user name is the email that received your invitation to register.
b. Your password was created by you. If you forgot your password, click the "Forgot Password?" link to reset it. Detailed password reset instruction can be found in Module 2 of this guide.

Scenario 2: Request Registration Invite from PD Admin

When you receive email invite, skip to 1:2 - Set Up a New Password.

Scenario 3: Register

Open a browser and go to https://caddsprod.servicenowservices.com/spd. You will be taken to the Log in page (Figure 1). Bookmark this page. Click the "Register" link under the log in button.

a. You will be directed to the Vendor Self Registration form (Figure 1.1)
   i. Enter your name, email and phone number.
   ii. Review the Privacy Policy and Terms and Conditions and click the checkbox to agree.
   iii. Click the "Sign Up" button at the bottom of the page.
b. A confirmation message will appear, "Thank you for signing up! Please check your registered email for login instructions."

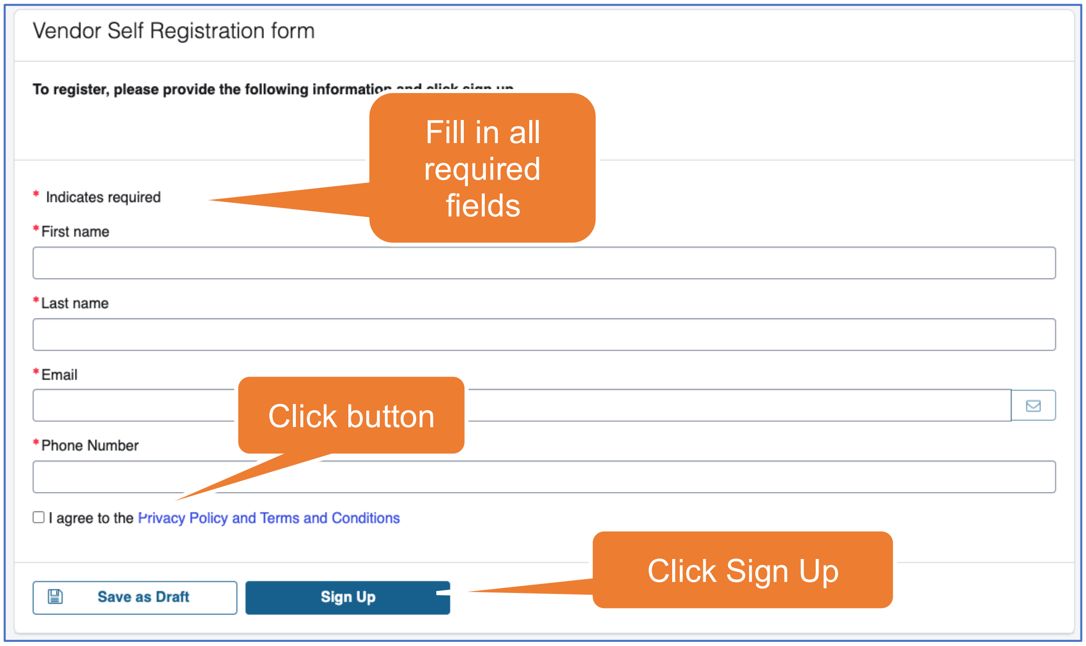


Figure 1.1: Vendor Self Registration Form

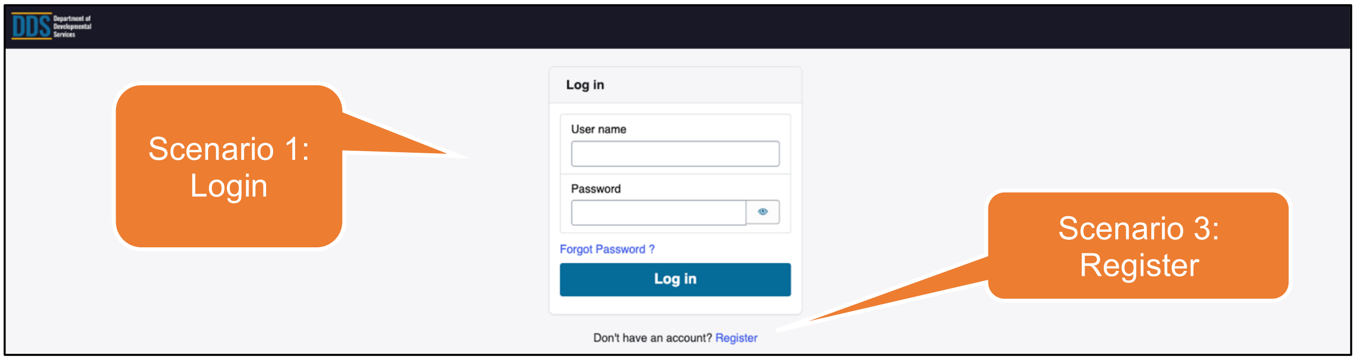


Figure 1.2: Log in page

1:2 Set up a New Password

1. You will receive an email from caddsprod@servicenowservices.com with the subject "Create your DDS Vendor Portal Password" (Figure 1.3).
2. Open the email and click the link titled “Password Set Up”.

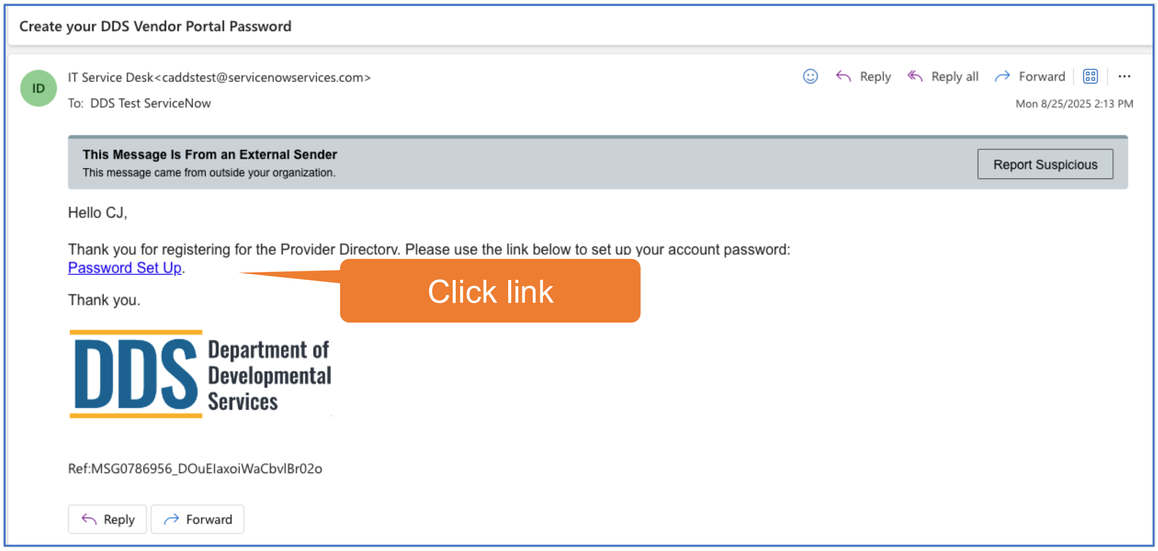


Figure 1.3: Registration Confirmation and Set Up Password Link Email

3. You will be directed to the reset password screen (Figure 1.4).
   a. Create a password that meets requirements
   b. Click “Reset Password” button to create your password.

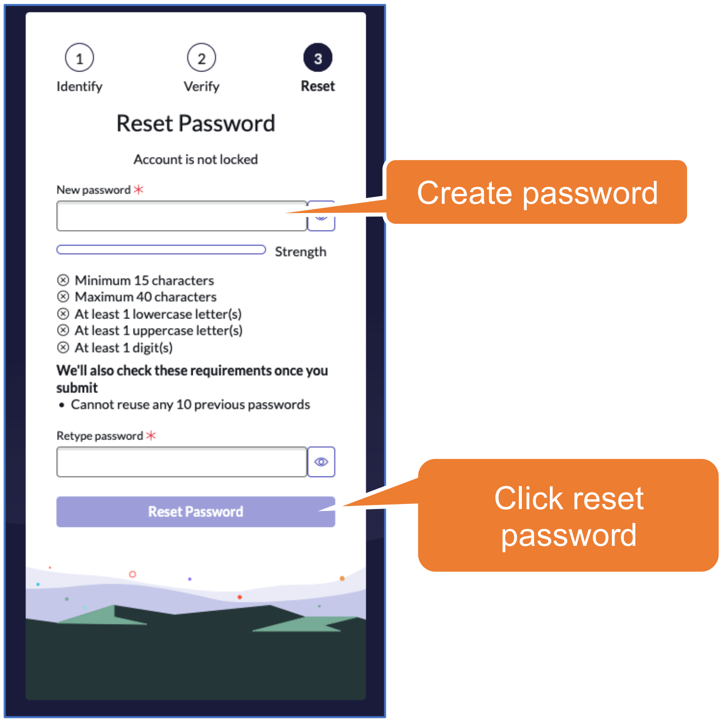


Figure 1.4: Reset Password Screen

4. You will view a Password Reset Success message. Click “Done” button.
5. You will receive an email with the subject line, “Welcome to the Provider Directory – Account Successfully Created.”
6. Click the link in the email - or - copy and paste https://caddsprod.servicenowservices.com/spd into a browser. You will be directed to the Provider Directory Login screen (Figure 1.1). Bookmark this page.
    a. Enter your email (e.g., johndoe@gmail.com) in the User Name field and the password that you created in the Password field.
    b. Click “Log in” button.

1:3 Reset 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 log in page (Figure 1.1).
2. Click on the "Forgot Password?" link. You will be directed to forgot password screen (Figure 1.5).
    a. Step 1: Identify: Enter your account email into the user name field and click “Next”
    b. Step 2: Verify: Enter your account email, the email that you registered with, into the email field and click “Next”.

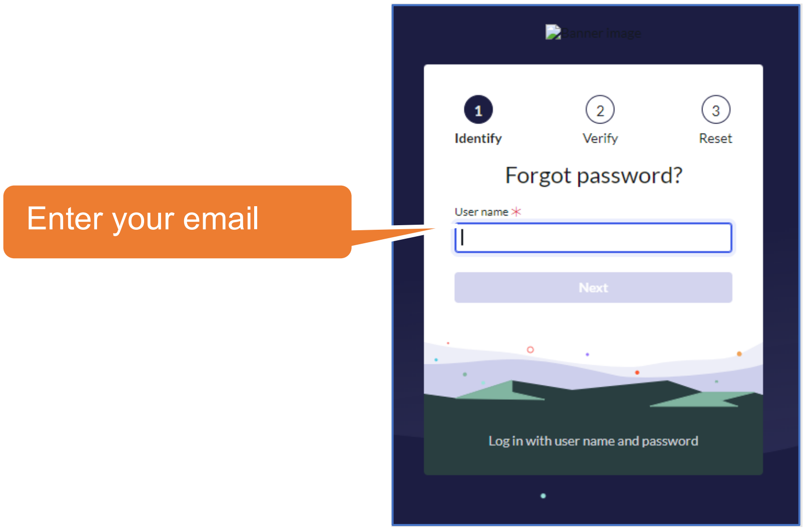


Figure 1.5: Forgot Password Screen

3. You will receive an email with a Password Reset link. Click on the link in the email.
4. You will be directed to the reset password screen (Figure 1.4).
    a. Create a password that meets requirements.
    b. Click “Reset Password” button.
7. You will view a Password Reset Success message. Click “Done” button.
8. You will be directed to the Provider Directory Login screen (Figure 1.1).
    c. Enter your email and the password that you created
    c. Click “Log in” button.

Module 2 – Homepage Introduction

This module will introduce you to the homepage and highlight key activities that begin on the homepage.

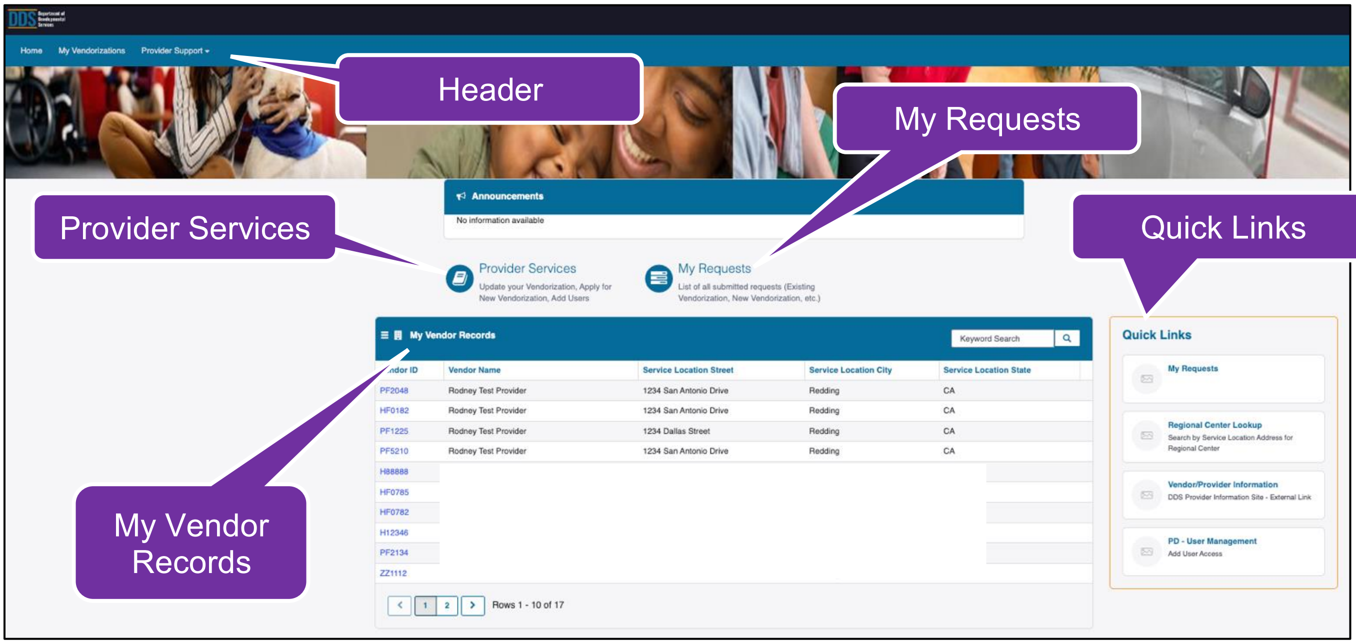


Figure 2.1: Provider Directory homepage

The Provider Directory homepage (Figure 2.1) offers multiple ways to access the information and tools that you need.

Want to view a vendor record?

- **My Vendorizations** tab, in the header, houses a table of all vendor records for the parent organization and includes the most recent case associated with each record, as applicable.
- **My Vendor Records**, in the middle of the homepage, is a table of all vendor records for the parent organization.

Want to submit a change to a vendor record?

- **Provider Services,** in the center of the dashboard, is the starting point for submitting record changes.

Want to view a case?

- **My Requests**, in the center of the dashboard and in Quick Links, lists all open cases and some information about each case. Closed cases can be accessed by selecting "closed requests" in the pull down.

Want to apply for vendorization?

- **Provider Services,** in the center of the dashboard, is the starting point for applying for vendorization.

Want to invite a user to register for your organization?

- **Provider/PD-User Management** can be accessed from the Provider Support tab in the header, Quick Links section, and from Support tab within Provider Services.

Want information to become a vendor/provider or maintain your vendorization?

- Vendor/provider information in Quick Links directs you to the DDS website where you can get more information about becoming a service provider and maintaining your vendorization.
- Regional center lookup in Quick Links directs you to DDS website where you can search catchment area boundaries for the 21 regional centers.

Module 3 – View and Submit Vendor Record

This module will introduce you to a vendor record and show how to submit a change.

A **Vendor record** contains information about the vendor pertinent to DDS.

3:1 View Record

To view a vendor record, navigate to one of two views:

1. Business location details page (Figure 3.2) – It consists of three sections and provides a summary of select vendor details and a list of all cases.
2. Vendor Data (Figure 3.4) – It is the entire vendor record and access to submit a record change.

View 1 – Business Location Detail

1. Login to Provider Directory.
2. Navigate to the My Vendor Records table on the homepage. (Figure 3.1)
3. Click the vendor ID in the first column.
4. You will be directed to the business location details page (Figure 3.2).

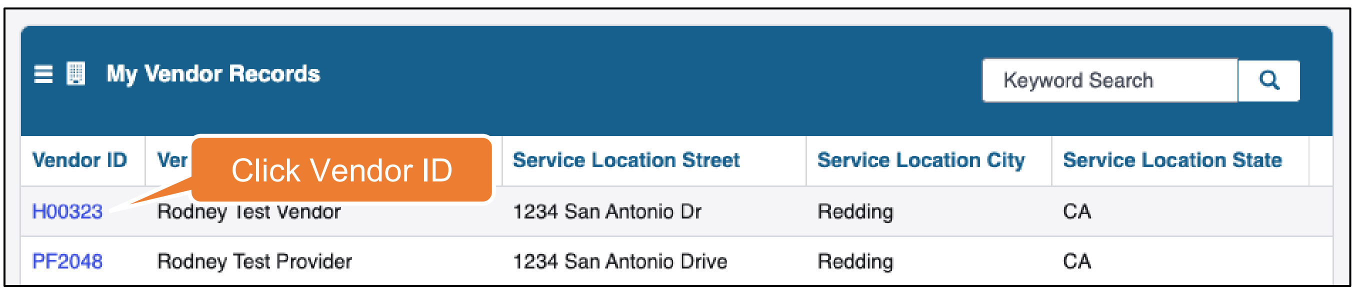


Figure 3.1: My Vendor Records

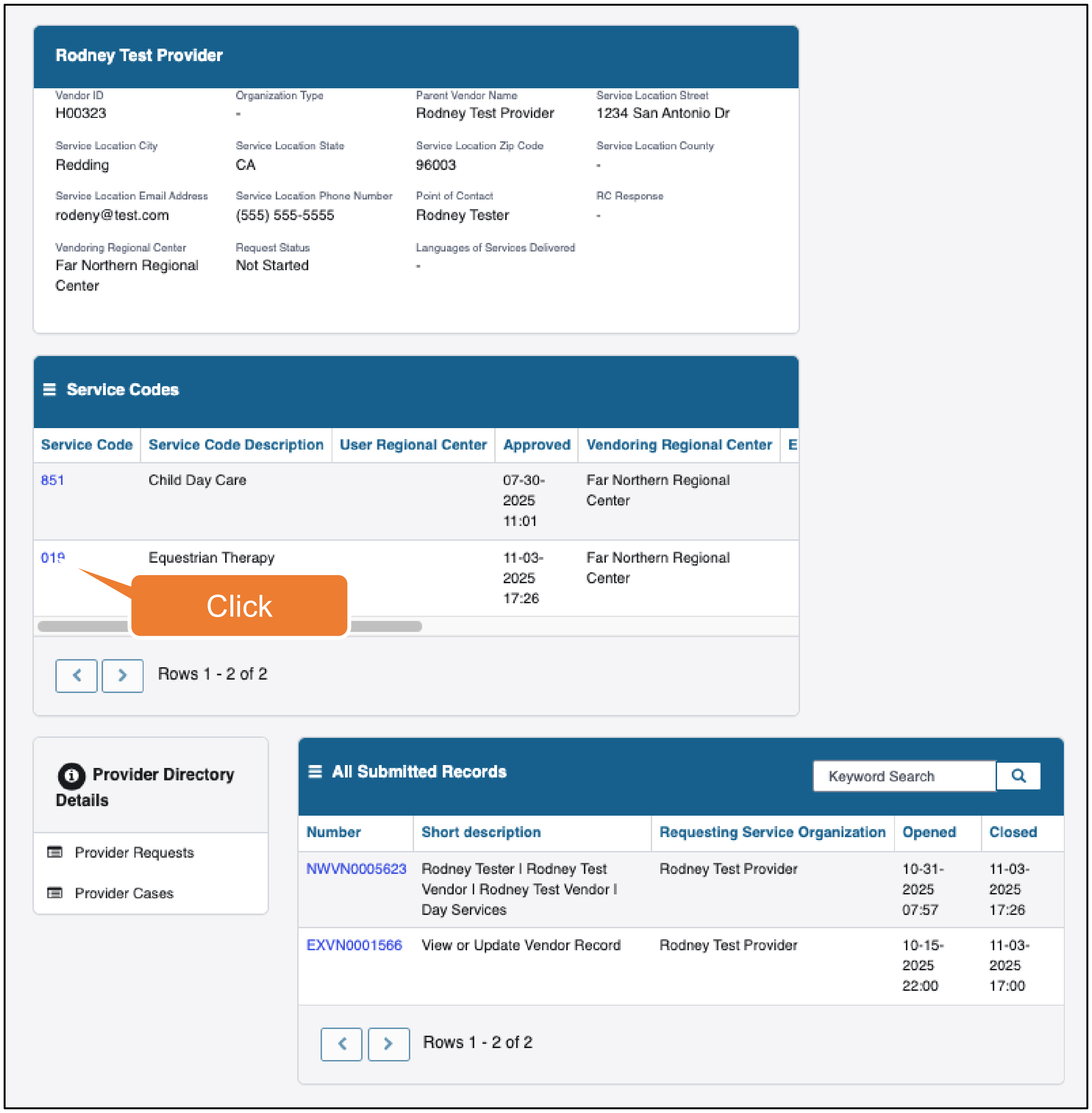


Figure 3.2: Business Location Details page

The Business Location Details page is grouped into three sections:

Top

This section displays key vendor information. Fields marked with a dash (–) indicate data that has not yet been submitted.

Middle

This section displays vendor details organized by service code. For each service code, there may be one or more rows - each representing a unique combination of service code and user regional center. The “approved” date represents the date the application for vendorization was approved or the user vendorization was completed. The vendoring regional center is responsible for reporting and maintaining all other fields within each row. They are summarized below:

		When applies	When applies
Field	Options	Figure 3.2	Figure 3.3
EVV Status	Self-registered, Fully compliant, Exempt, Non compliant, Not applicable	Self-registered or Fully compliant or Exempt or Non compliant	Self-registered or Fully compliant or Exempt or Non compliant
CAP	Applicable or not	True	Check in checkbox
CAP Date	When applicable, date of most recent CAP	Date	Date
Sanction	Applicable or not	True	Check in checkbox
Sanction Date	When applicable, date of most recent Sanction	Date	Date
HCBS Status	Applies or Does not apply	Applies	Applies
HCBS Settings Rule Compliant	When applicable, checkbox	Check in checkbox	Check in checkbox

Bottom

This section lists all cases and provides quick access to a case's activity and attachments tabs. For EXVN cases, you can also access the process tab. Note: This same information is available via My Requests table which is filtered for open and closed cases.

Clicking on the service code link (Figure 3.2) directs you to a summary page of the information contained in each row. (Figure 3.3)

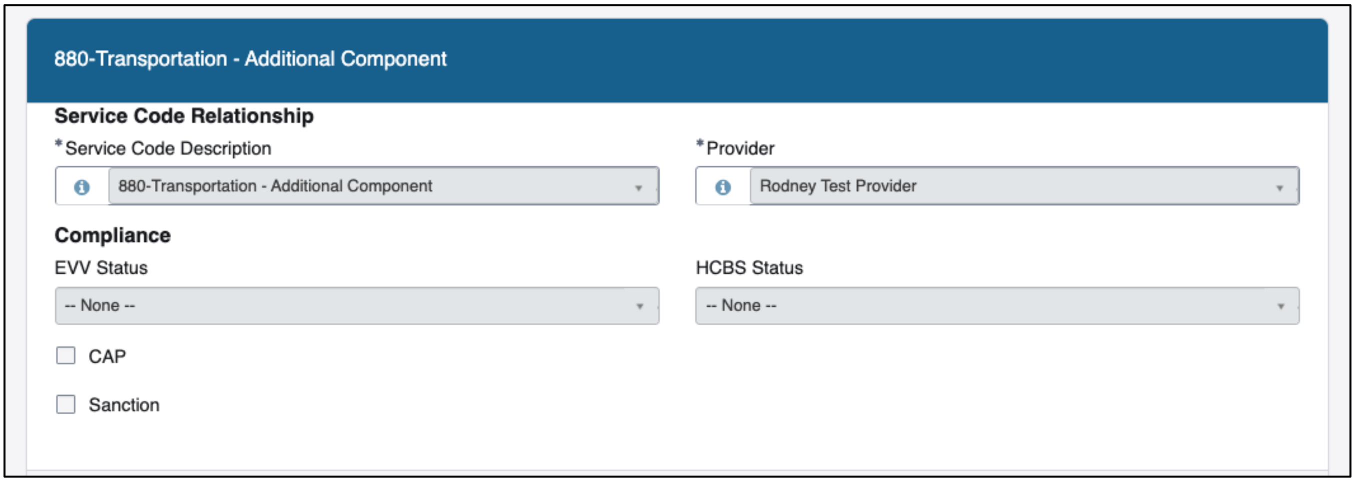
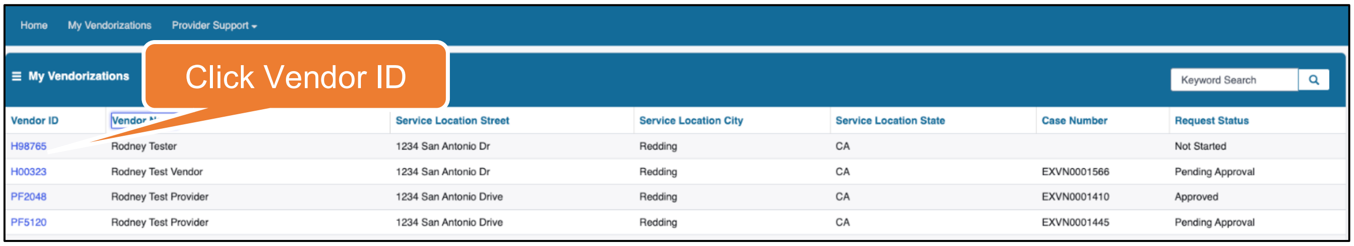


Figure 3.3: Business location details page

View 2 – Vendor Data Record

The Vendor Data page displays the vendor’s current information and attachments in the Provider Directory and is the gateway to submit record changes.

1. Login to Provider Directory.
2. Click the My Vendorizations tab in the header. (Figure 2.1).
3. You will be directed to the My Vendorizations table (Figure 3.4)
4. Click the vendor ID in the first column.
5. You will be directed to the Vendor Data page (Figure 3.5).



Vendor ID	Vendor N	Service Location Street	Service Location City	Service Location State	Case Number	Request Status
H98765	Rodney Tester	1234 San Antonio Dr	Redding	CA		Not Started
H00323	Rodney Test Vendor	1234 San Antonio Dr	Redding	CA	EXVN0001566	Pending Approval
PF2048	Rodney Test Provider	1234 San Antonio Drive	Redding	CA	EXVN0001410	Approved
PF5120	Rodney Test Provider	1234 San Antonio Drive	Redding	CA	EXVN0001445	Pending Approval

Figure 3.4: My Vendorizations

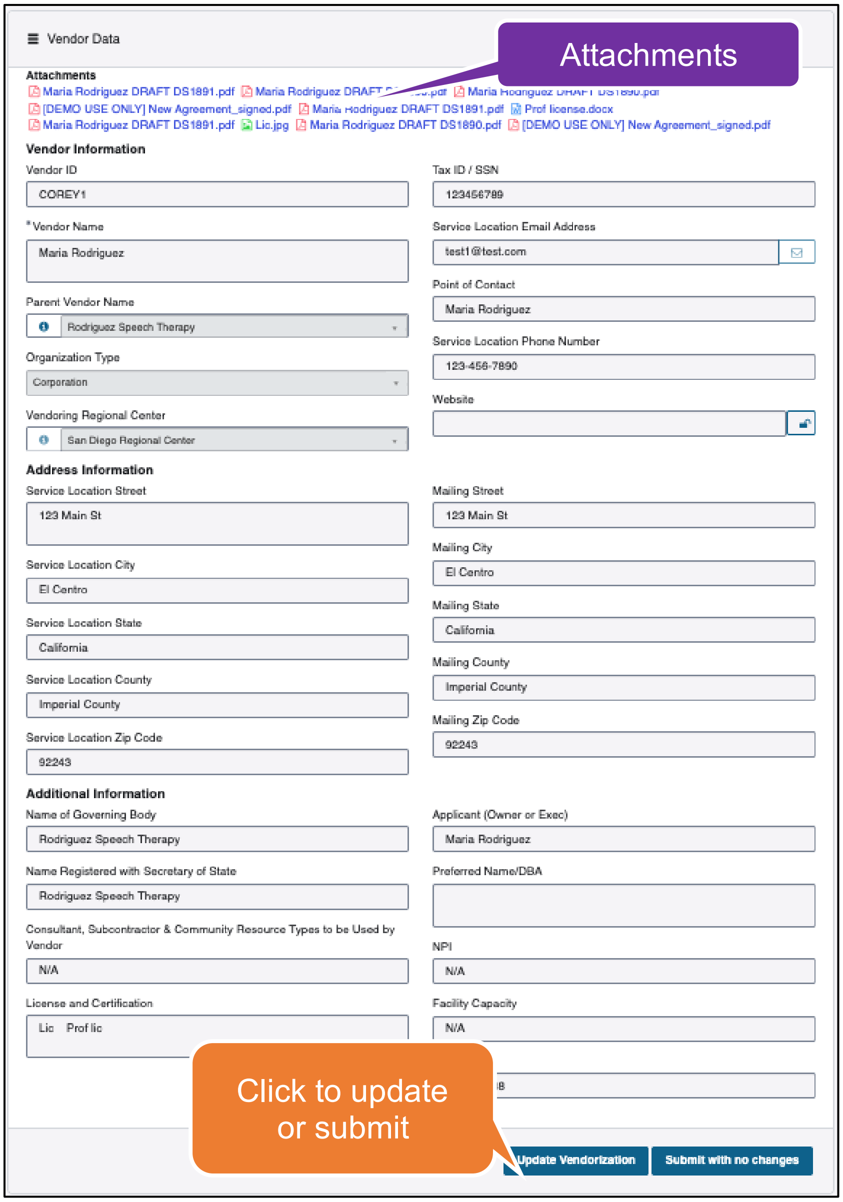


Figure 3.5: Vendor Data

Attachments are visible and accessible on the vendor data record (Figure 3.4). The following summarizes processes that populate attachments to the vendor record.

Process	Scenario
Vendorization	Attachments are automatically moved from the case to the vendor record, following the approval of the vendorization application.
Change request	Attachments are automatically moved from the case to the vendor record, following the approval of the change request.
User vendorization	Attachments are automatically moved from the case to the vendor record, following the close of the process.
Regional center action	Attachments can be uploaded by the regional center.

3:2 Submit Record

This module will walk you through how to submit no change (a.k.a., validate your record) and submit a change.

> **!** A change cannot be submitted to a record in a Request Status of Pending Approval (Figure 3.5). This request status is active when a record has been submitted and is awaiting a regional center decision. See section 3:4 for other change request statues.

Request status

Service Location State	Case Number	Request Status
CA		Not Started
CA		Not Started
CA	EXVN0001410	Approved
CA	EXVN0001445	Pending Approval
CA	EXVN0001606	Pending Approval
CA		Rejected - Resubmit

Figure 3.5: Request Status

Submit Record - No Change

1. Login to Provider Directory.
2. Click the My Vendorizations tab in the header. (Figure 2.1).
3. You will be directed to the My Vendorizations table (Figure 3.4)
4. Click the vendor ID in the first column.
5. You will be directed to the Vendor Data page (Figure 3.5).
6. Review the information.
7. If the information is accurate and complete, click the "Submit with no changes" button. If the vendor record is missing information, the button will not appear. You will be required to submit changes.

A pop-up message will appear thanking you for the submission. See 3.3 Change Requests for what to expect next.

Submit Record - Change(s)

1. Login to Provider Directory.
2. Click the My Vendorizations tab in the header. (Figure 2.1).
3. You will be directed to the My Vendorizations table (Figure 3.4)
4. Click the vendor ID in the first column.
5. You will be directed to the Vendor Data page (Figure 3.5).

6. If the record is missing required information, you will see a red banner at the top of the page, that will say, " Error Some fields are incomplete: [field name].

7. Scroll down and click the Update Vendorization button.
8. If no buttons are on the page, your vendor record is locked awaiting a regional center decision. Note: Users with Read Only access cannot make edits so no buttons will appear.
9. You will be directed to the View or Update Vendorization Record page. (Figure 3.7)

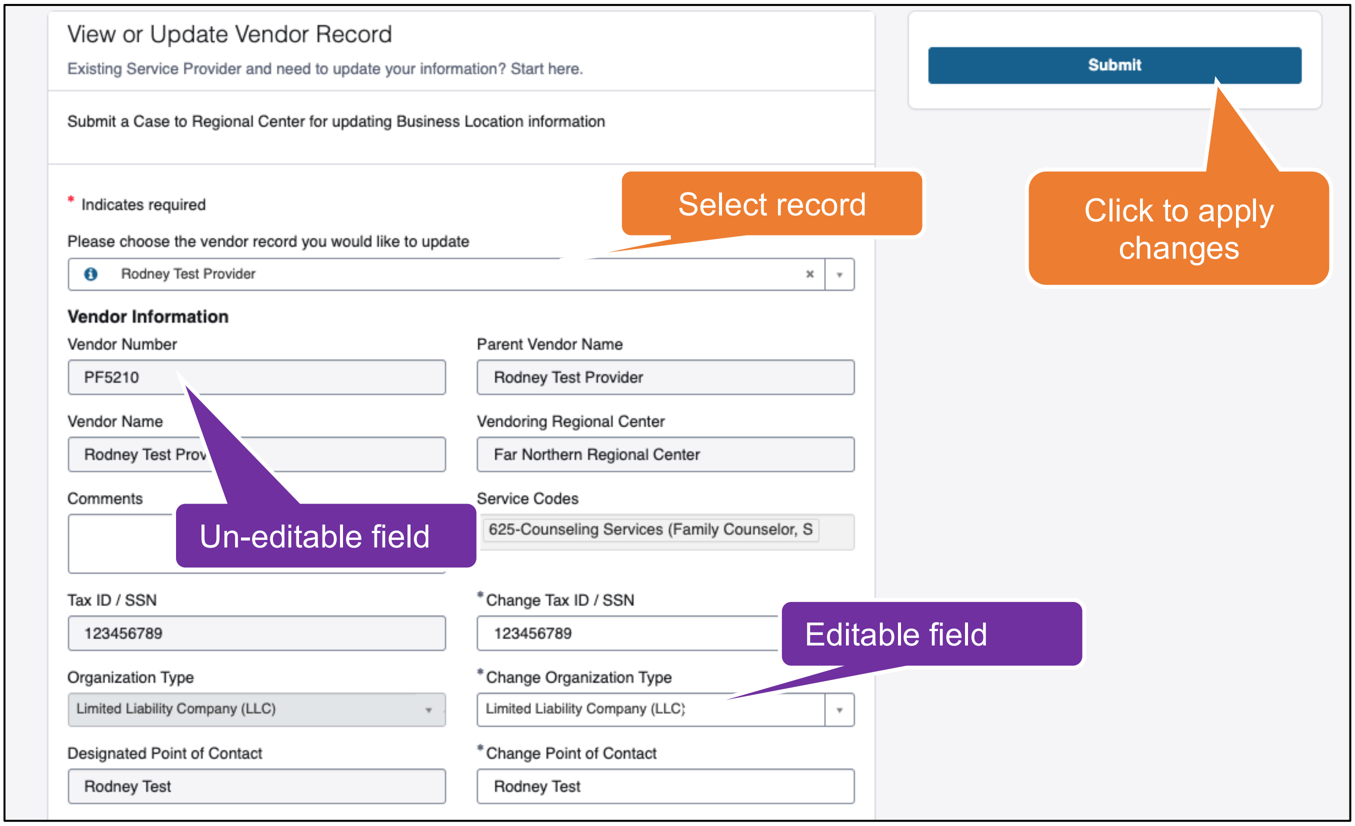


Figure 3.7: View or Update Vendor Record – Top half of page

10. Make edits and complete all required fields (*). **If a <u>required</u> field does not apply to your vendorization, enter "n/a."** The following are tips that may help you complete the fields:
    a. Most editable fields are in the right column, start with the name "change," and have a white background. They will be pre-populated with existing information, when available, and can be edited. Fields will grey background are not editable.
    b. The Comments field is also editable.
    c. Un-editable fields are in the left column and have a grey background. A circle with a slash through it appears when hovering over an un-editable field.
    d. Incomplete required fields have a red asterisk (*). Complete required fields have a grey asterisk (*).
    e. If you completed your vendorization outside the Provider Directory, - typically through a legacy process - you will be required to complete additional fields that are required in the Directory. Refer to your vendorization to know what information to report in the vendor data fields.
    f. The date of birth entered should reflect that of the applicant (owner/executive).
    g. When reporting languages served, English is assumed. Please select any additional languages that apply.

h. When applicable, enter the name of licenses and certifications that apply to your business. To upload a copy of a license or certificate, click the paperclip at the bottom of the page and follow the steps.

11. Click “Submit” button to apply the changes.

A pop-up message will appear thanking you for the submission.

A case number will be assigned. You will be directed to the View or Update Vendor Record page. The **major** changes will be reported in the activity stream. To view **all** changes, navigate to the case summary section and click the Options link to expand the record to show all fields.

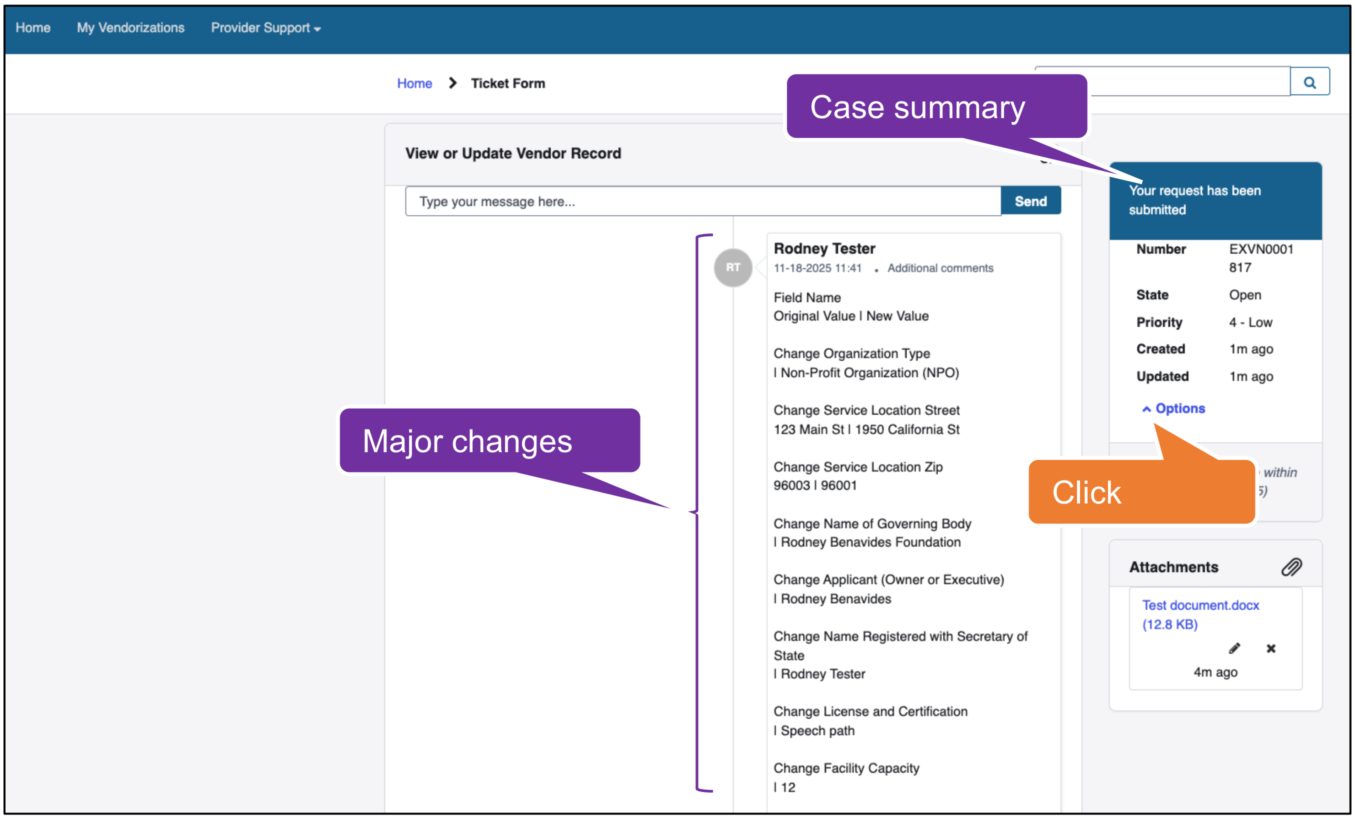


Figure 3.8 View or Update Vendor Record – After submission

Subsequent actions are dependent on type of change. See 3:3 Change Requests for what to expect next.

"Service Location" is referred to as "Service Address" in the Vendor Application (DS 1890) and "Business Address" in the Applicant/Vendor Disclosure Form (DS 1891). For site-based services, your service location is the location where you provide your service. For non-site-based services, you service location is your primary office or operating location within the regional center's catchment area.

3:3 Change Requests - Insignificant vs Major

Excluding no change, change requests are grouped into two types: minor and major. Each type has its own approval process.

"Minor" changes include edits to any or all the following fields:

- Service Location Phone Number
- Service Location Email Address
- Point of Contact
- NPI
- Consultant, Subcontractor & Community Resource Types to be Used by Vendor
- Date of birth
- Website
- Preferred name/DBA
- Languages served

If a service provider **only** makes "**Minor**" change(s), the Provider Directory will send an email confirmation of the submission. The request is automatically approved, and the case is closed. The vendor record's Request Status will change to "Approved." The vendoring regional center will not be notified, but the case will be added to their completed "minor or insignificant" cases list view.

"Major" changes are those that include changes to any or all the below fields and need to be reviewed by the regional center:

- Vendor Name
- Applicant (Owner or Executive)
- Name of Governing Body
- Name Registered w/Secretary of State
- Organization Type
- Federal Tax ID / SSN
- Service Location Street, City, State, Zip Code, County
- Mailing Street, City, State, Zip Code, County
- License and Certification
- Facility Capacity

If a service provider makes a **"Major"** change, the Provider Directory will send an email notification with a confirmation of the submission and the vendor record's Request Status will change to "Pending Approval." 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. The email notification will provide the specific regional center response. Please view it for any additional actions to be taken.

3:4 Change Request Status

Each vendor record has a status. My Vendorizations table (Figure 3.4) lists all your vendor records that are associated with your parent organization and includes each record's request status. A record's request status can impact your ability to submit additional edits.

"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.

Request Status	Scenario(s)	Ability to edit and submit change
Not started	• Awaiting service provider review and submission	Yes
Approved	• Service provider submitted "submit with 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	Yes
Pending approval	• Service provider submitted major change(s) and is awaiting regional center review and approval or rejection decision	No - Locked until decision
Rejected - Resubmit	• Service provider submitted major change(s) and regional center rejected it and requested corrections with resubmission	Yes
Rejected - Closed	• Service provider submitted major change(s) and regional center rejected it and asked for service provider to contact the regional center	No

Module 4 – View and Manage Case

This module will walk you through how to view and manage your case.

A **Case** (EXVN or NWVN) is a record that captures all details of a vendor's request to facilitate tracking from creation to resolution.

- EXVN is used for vendor record changes.
- NWVN is used for vendorizations.

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

4:1 Select a Case

1. Navigate to My Requests and click. (Figure 4.1)

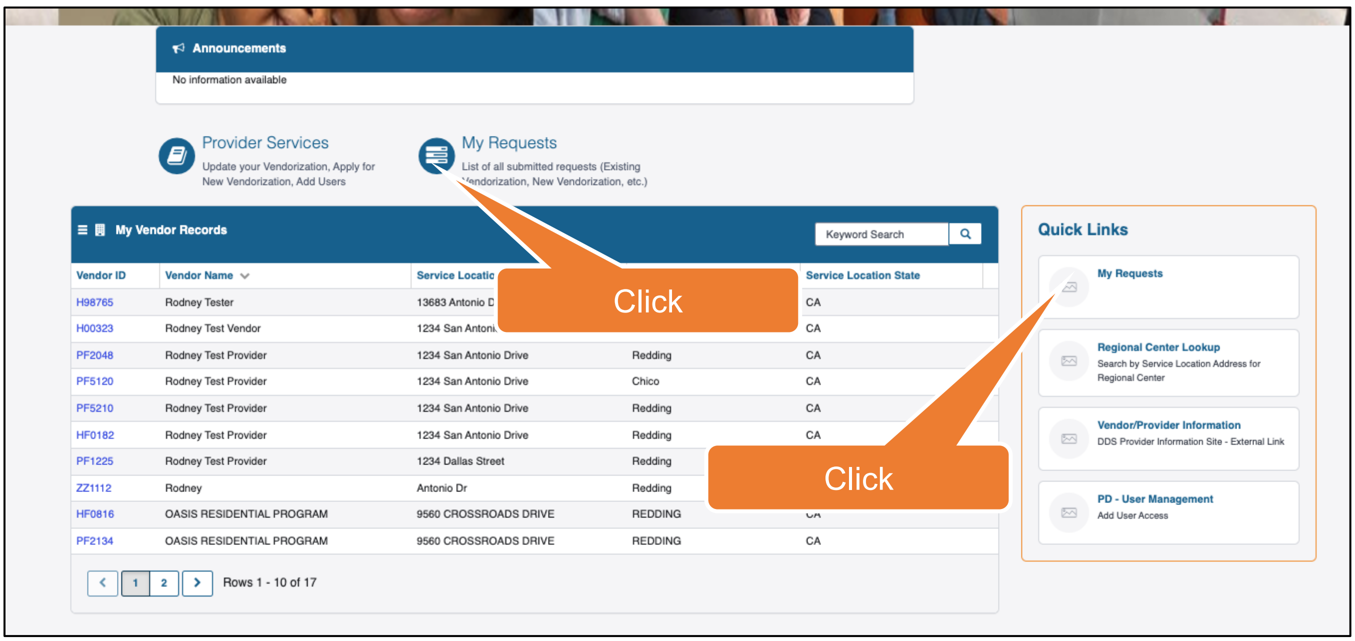


Figure 4.1: My Requests

2. You will land on the My Request table. (Figure 4.2).
    a. The default view is open requests.
    b. Click the dropdown to switch to closed requests.
3. Locate your desired case and click the case ID.
4. You will be directed to:
    a. EXVN - View or Update Vendor Record page (Figure 4.3)
    b. NWVN – Case summary (Figure 4.4)
5. Review the information in the activity stream. If the request is open, you may add comments and attachments in the activity stream.

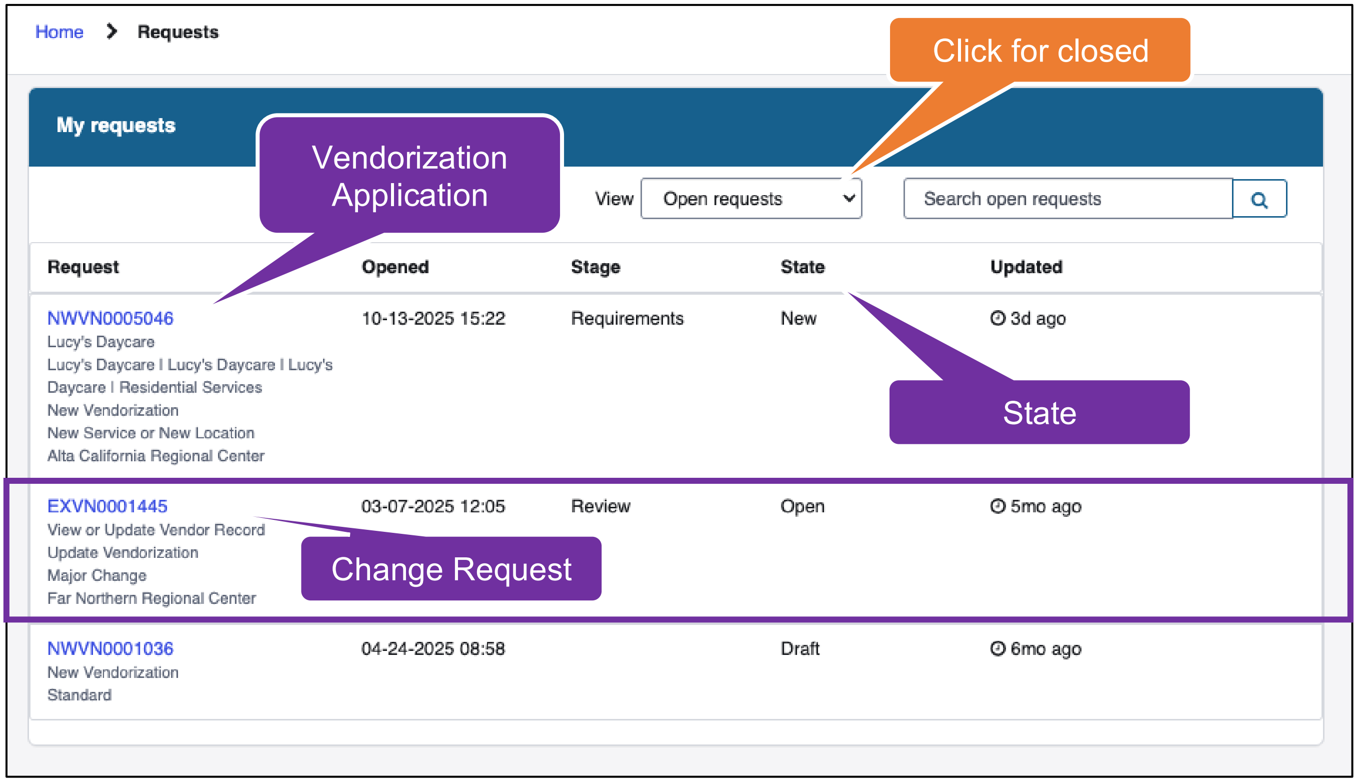


Figure 4.2: My Requests - Open

4:2 View Change Request (EXVN)

The case summary page contains information about the case and tools to communicate with the vendoring regional center.

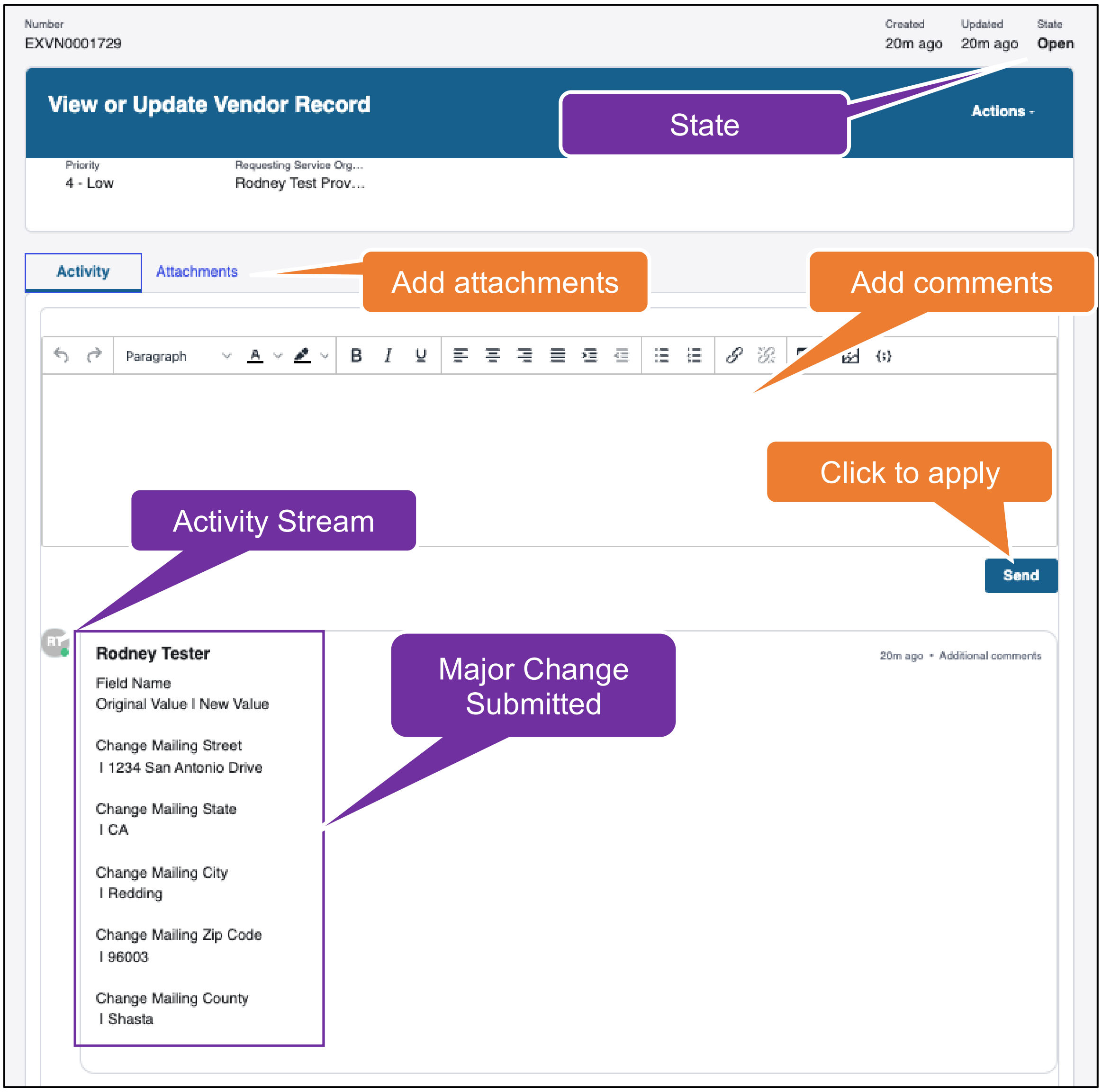


Figure 4.3: View or Update Vendor record (EXVN)

The following are states and statuses of Change Requests (**EXVN**):

State	Request Status	Description	Ability to edit case
Open	Pending Approval	Open requests are requests submitted and awaiting review and approval or rejection by the regional center.	No
Closed	Approved, Rejected-Resubmit or Rejected-Cancelled	Closed requests are requests submitted by the service provider, including cancelled, with an approved or rejected status.	No

4:3 View Vendorization (NWVN)

The case summary page contains information about the case and tools to communicate with the vendoring regional center.

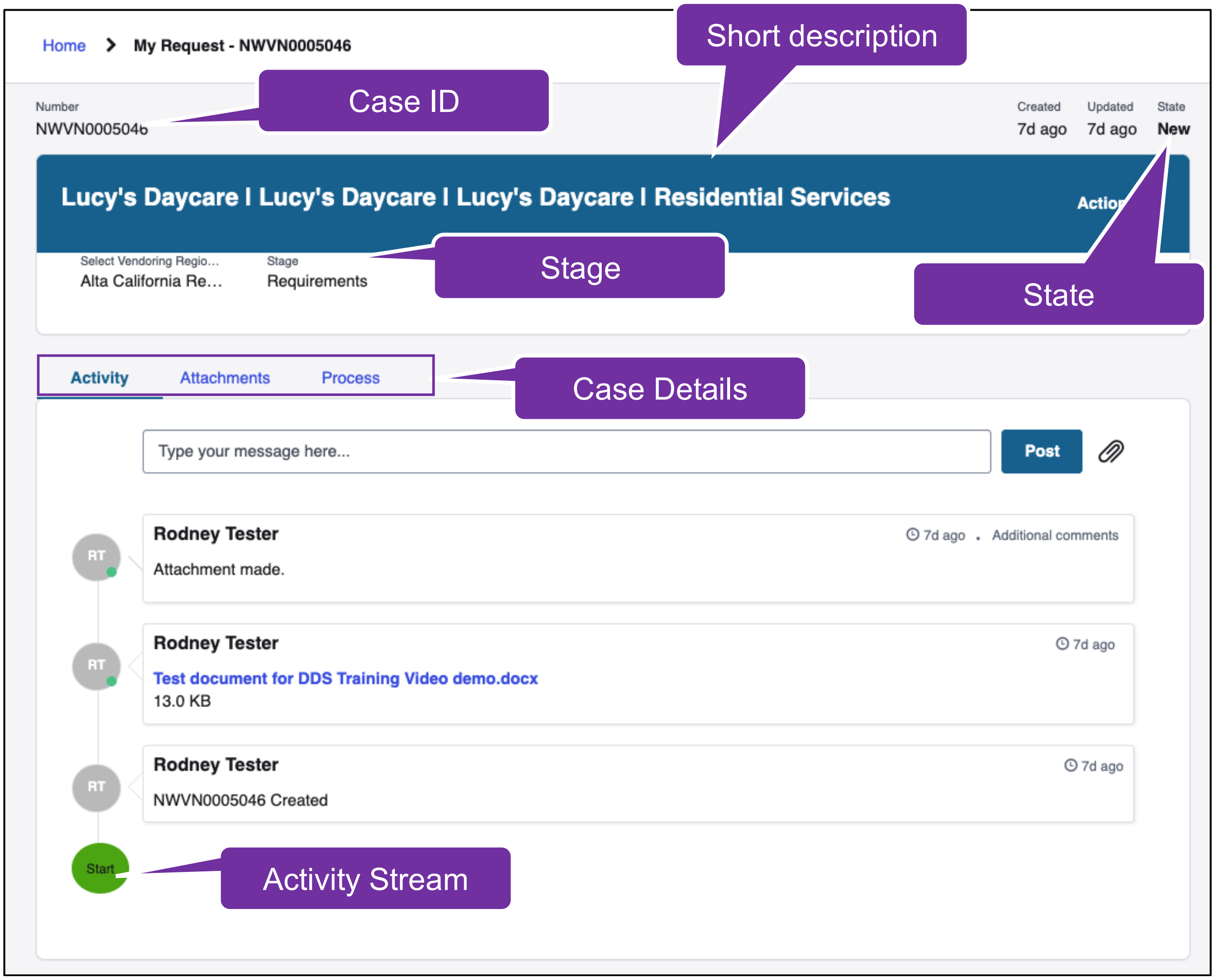


Figure 4.4: Case Summary - EXVN

1. **Short description** is comprised of the following fields, based on what you submitted: applicant name, name of governing body or management organization, name registered with the CA Secretary of State and category of service selected. This short name helps the regional center distinguish your application from others.

2. **State** – As the case moves through the application process, its state will change. This table lists case states and when they are applicable.

State	Scenario
Draft	The application has been started but not yet submitted.
New	The application has been submitted but not yet assigned to a regional center staff member
Open	The application has been opened and is being worked by a regional center staff member
Awaiting info	The regional center is awaiting a response from the applicant
Closed	• The application has been processed, and a decision was rendered • The case was closed by the applicant • The case was closed by the regional center

3. **Stage** – See Figure 5.1 for an overview of the stages.
4. **Case details** - Three tabs at the top of the page:
    a. Activity (a.k.a., Activity Stream) – This tab includes a vertical, visual tracker of activities, messages and attachments.
    b. Attachments – This tab lists documents uploaded by you or the regional center.
    c. Process – This tab displays your status in the vendorization process. In this example (Figure 4.5), the check mark next to Requirements stage, at the top of the page, indicates that stage is complete. Green check marks in the Activities list show which tasks are complete.

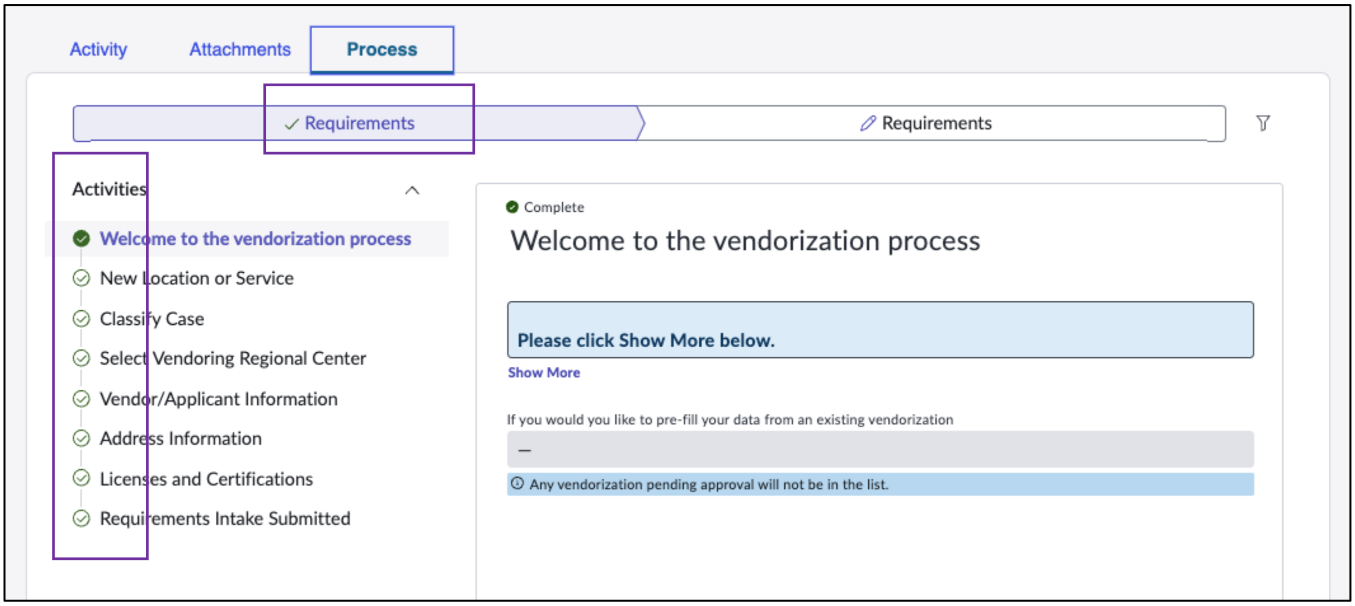


Figure 4.5: Process Tab: Requirements Stage Complete

! Once you have completed the activities in a stage, the information submitted in activities can be viewed but not edited. If you need to make a change, contact the vendoring regional center to determine the next best step.

Alternatively, cases can be accessed from the vendor's business location details page—but only if the page exists. This page is automatically created when the first vendorization is approved. (Figure 4.5). This is a great option when you are looking for information specific to your vendor record.

1. Navigate to My Vendor Records. (Figure 4.1)
2. Click on the desired vendor ID link.
3. You will be directed to the business location details page. (Figure 4.6)
4. Scroll down to All Submitted Records.
5. Select a Case ID link.

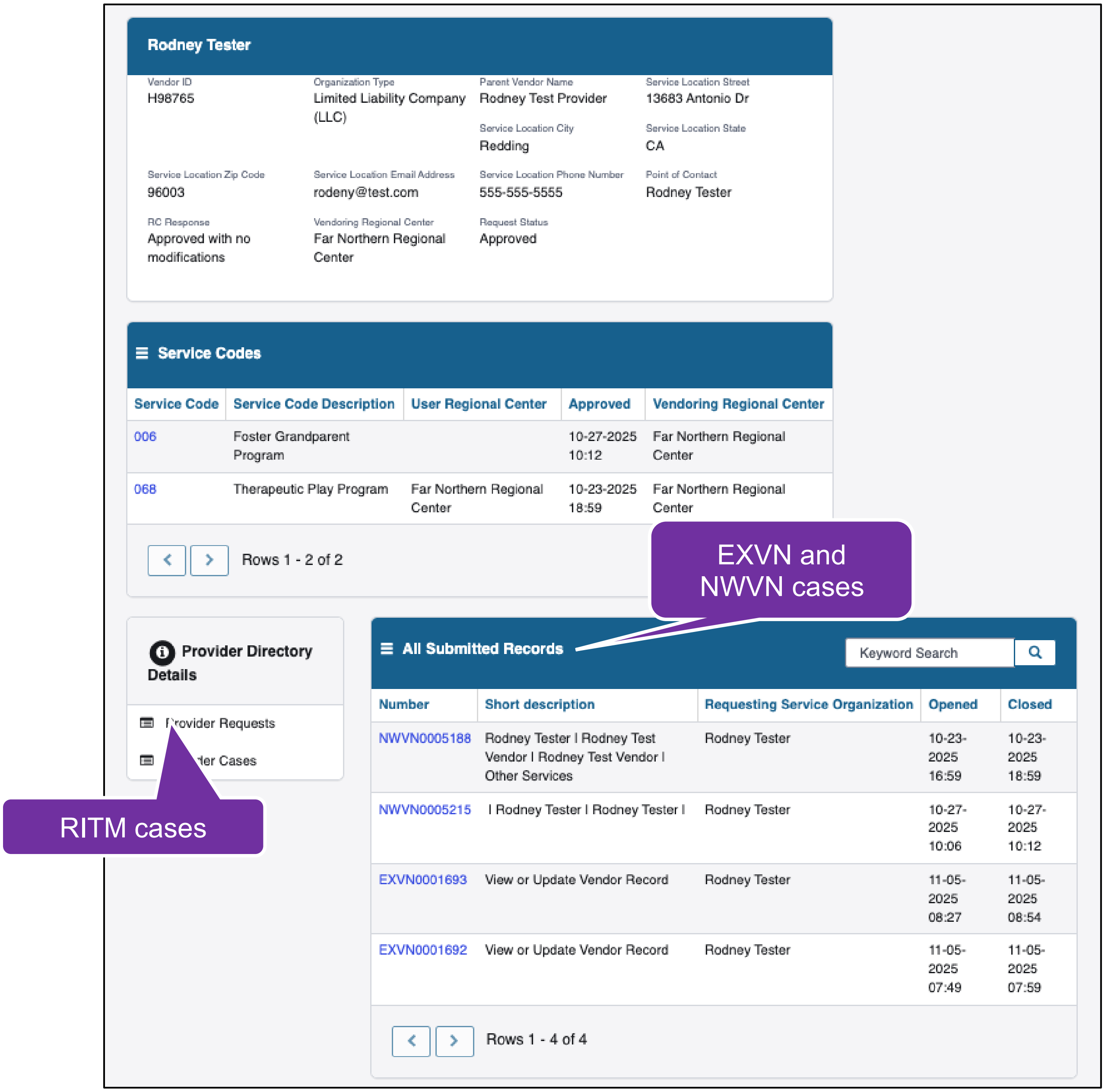


Figure 4.6: Business Location Table - Submitted Records

4:4 Manage a Rejected Change Request (EXVN)

If your change request is rejected, you will receive an email with a link to your case, your vendor ID, and the comments to support the rejection. Click the link to be directed to the Provider Directory login page. After logging in, you will be directed to the View or Update Vendor Record view of your case (Figure 4.7).

The regional center has two reject options: resubmit and closed. You will need to know which one applies to determine your next step.

1. Click the My Vendorizations tab.
2. On the My Vendorizations table (Figure 4.7), locate the Vendor ID that was listed in your email.
3. Check the Request Status column.
    a. Reject – **Resubmit** closes the case. You can submit a new change request.
    b. Reject – **Closed** closes the case and the vendor ID. Contact the regional center to take an action outside of the Provider Directory following existing regional center procedures.

≡ My Vendorizations

Keyword Search

Vendor ID	Vendor Name	Service Location Street	Service Location City	Service Location State	Case Number	Request Status
PF2048	Rodney Test Provider	1234 San Antonio Drive	Redding	CA	EXVN0001691	Rejected - Resubmit
HF0182	Rodney Test Provider	1234 San Antonio Drive	Redding	CA		Rejected - Resubmit
PF1225	Rodney Test Provider	1234 Dallas Street	Redding	CA	EXVN0001444	Rejected - Resubmit
PF5210	Rodney Test Provider	1234 San Antonio Drive	Redding	CA	EXVN0001729	Pending Approval
H88888	Molly Smith	4108 57th St	Sacramento	California	EXVN0001751	Pending Approval
HF0785	BRAVO PROGRAM	9560 CROSSROADS DRIVE	REDDING	CA		Not Started

Figure 4.7: My Vendorizations

To view the case's comments and/or attachments, follow these steps.

1. Navigate to the My Vendor Records Table.
2. Click the vendor ID link.
3. You will be directed to the business location details page.
4. Navigate to the All Submitted Records section and locate the case ID. (Figure 4.8)
5. Click the case ID link.
6. You will be directed to the View or Update Vendor Record page.
7. Review the activity stream for regional center activity. (Figure 4.9)

≡ All Submitted Records

Keyword Search

Number	Short description	Requesting Service Organization	Opened	Closed
EXVN0001410	View or Update Vendor Record	Rodney Test Provider	02-25-2025 16:38	02-25-2025 16:38
EXVN0001691	View or Update Vendor Record	Rodney Test Provider	11-04-2025 21:11	11-05-2025 08:57

Rows 1 - 2 of 2

Figure 4.8: All Submitted Record

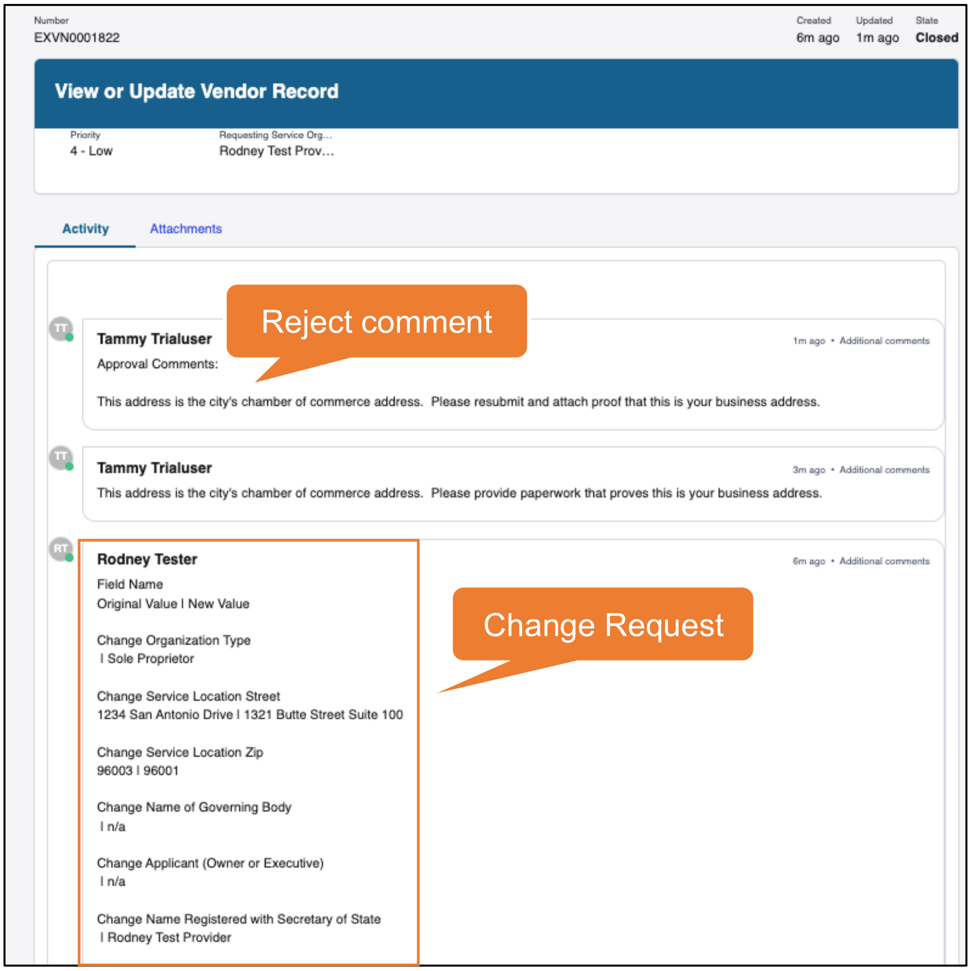


Figure 4.9: View or Update Vendor Record – Reject Comments

Module 5 – Apply for Vendorization

This module will walk you through the process of applying for vendorization in the Provider Directory.

The vendorization process has three stages: Requirements, Submission and Decision. The process, including responsibilities of the applicant/service provider and regional center, and associated response time requirements are outlined below (Figure 11).

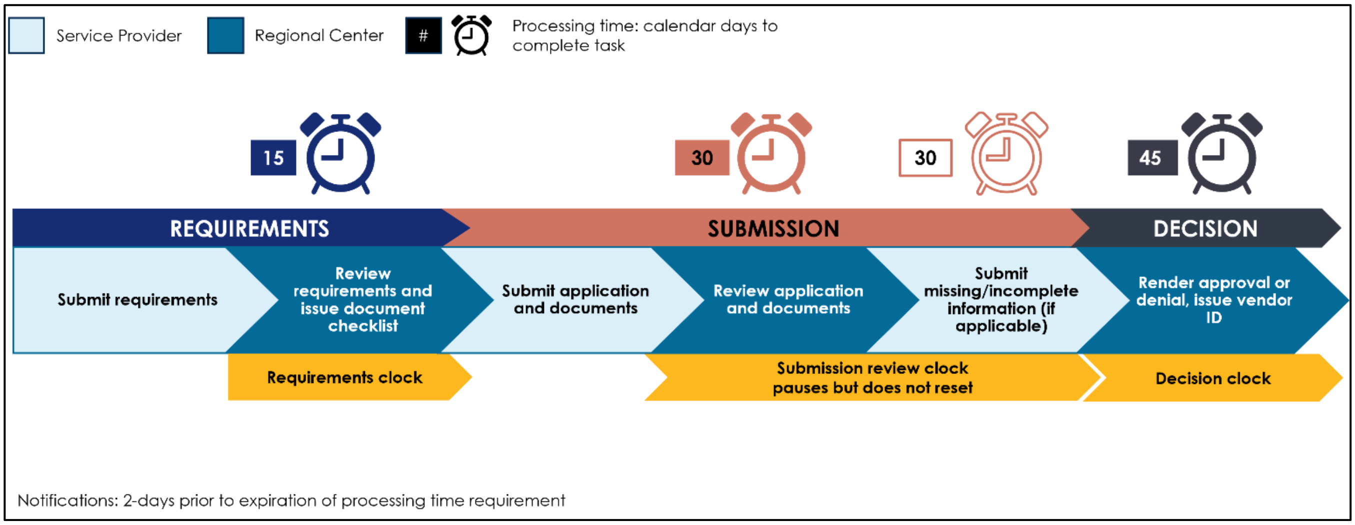


Figure 5.1: Vendorization Process & Response Time Requirements

! The Provider Directory does not automatically route or validate applications based on service type or service code. It's up to the applicant and the regional center to ensure the correct selections are made during the vendorization process.

5:1 Requirement Stage

The process begins with the applicant submitting select information to support they currently have the minimum requirements to apply for vendorization.

Start the Application – New Applicant

1. Log in to the Provider Directory. See Module 1 to register or reset your password.
2. On the home page, click “Provider Services.” (Figure 2.1)
3. Click “Apply for Vendorization” (Figure 5.2)

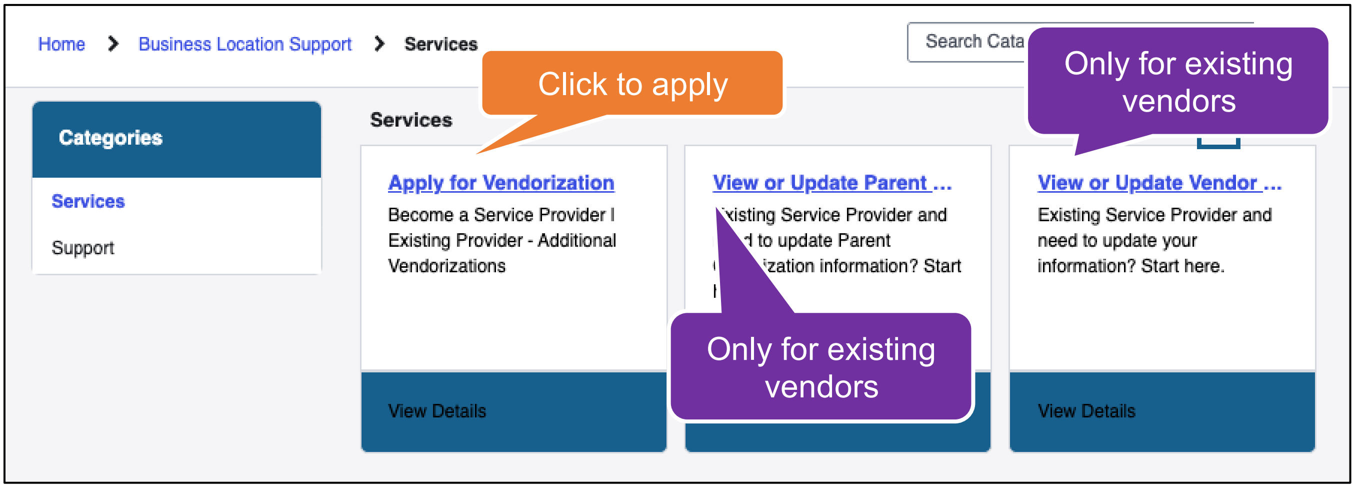


Figure 5.2: Provider Services

4. On the Welcome screen (Figure 5.3), click “Show More” to expand the introduction and read the overview of the process. *Existing providers will have an additional step. Scroll down and read the section titled, Start the Application – Existing Service Provider (Only)*.
5. Click “Continue.”

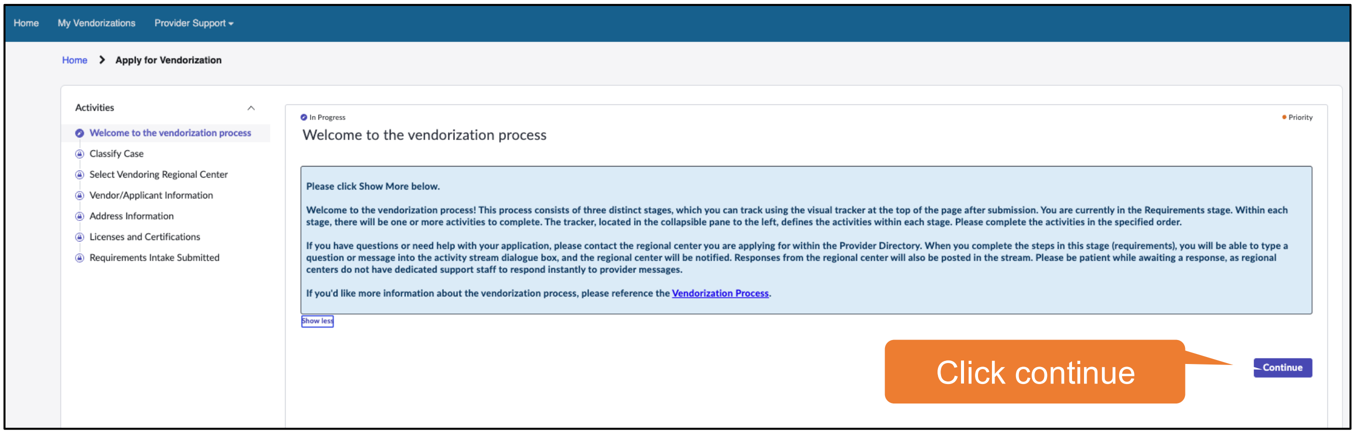


Figure 5.3: Welcome - New

Through the vendorization process you will be asked to click **Continue**, **Update** or **Mark Complete.** Their outcomes are as follows:

- Continue moves you forward.
- Update saves your progress but does not advance you to the next step.
- Mark Complete saves and moves you forward.

Start the Application – Existing Service Provider (Only)

1. On the home page, click “Provider Services.” (Figure 2.1)
2. Click “Apply for Vendorization” (Figure 5.2)
3. On the Welcome screen (Figure 5.4), click “Show More” to expand the introduction and read the overview of the process.
4. Click the field labeled, “What type of vendorization are you requesting?” to open the drop-down menu. (Figure 5.4) Select the best option. See scenarios below to determine the best fit for the application.

Type of vendorization	**Scenario**
New service	Application for new service using the **same** information as the existing vendorization.
New location, same catchment area	Application with a new service address in the same vendoring regional center catchment.
New location, different catchment area	Application with a service address in a different regional center catchment.

Catchment refers to the geographic boundaries defining the 21 regional centers.

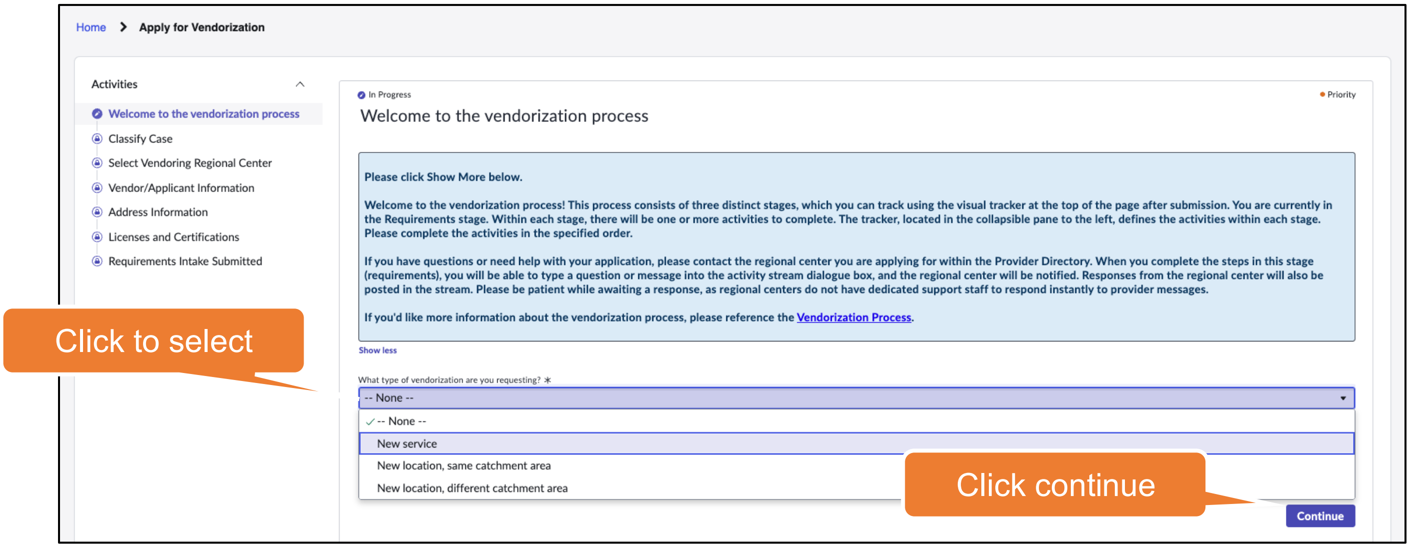


Figure 5.4: Welcome - Existing Service Provider –Type of vendorization

5. [Optional] You may pre-fill data from an existing vendorization. (Figure 5.5)
    a. Click the magnifying glass. A pop-up window will appear with a list of approved vendorizations.
    b. Select a vendorization. Information from this vendorization will populate to your application and be editable in subsequent steps.
6. Click "Continue."

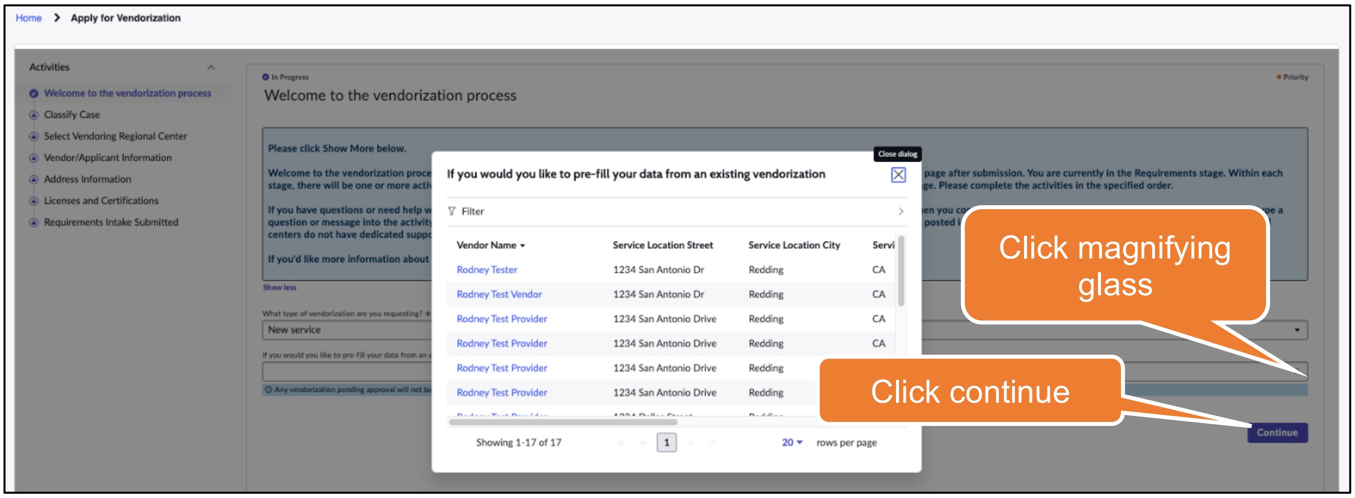


Figure 5.5: Welcome - Existing Service Provider – Pre-fill

> Vendoring regional center is determined by the service address you provide. For site-based services, your service address is the location where you provide your service. For non-site-based services, you service address is your primary office or operating location within the regional center's catchment area.

Select Vendoring Regional Center

1. If the fields are blank, complete the following steps. Otherwise, proceed to step 2.
    a. Enter your Service Street, City, State, and Zip Code. (Figure 5.6)
    b. Leave “Select Vendoring Regional Center” blank.
    c. Skip to step 3.
2. Review pre-populated fields. If any fields are incomplete or inaccurate, make change(s).
3. Click “Verify Regional Center”.
4. A pop-up will display the assigned Regional Center based on your address.
5. Click “OK” to confirm.
6. The Regional Center will auto-populate to the field labeled, “Select Your Vendoring Regional Center.”
7. Click “Mark Complete.”

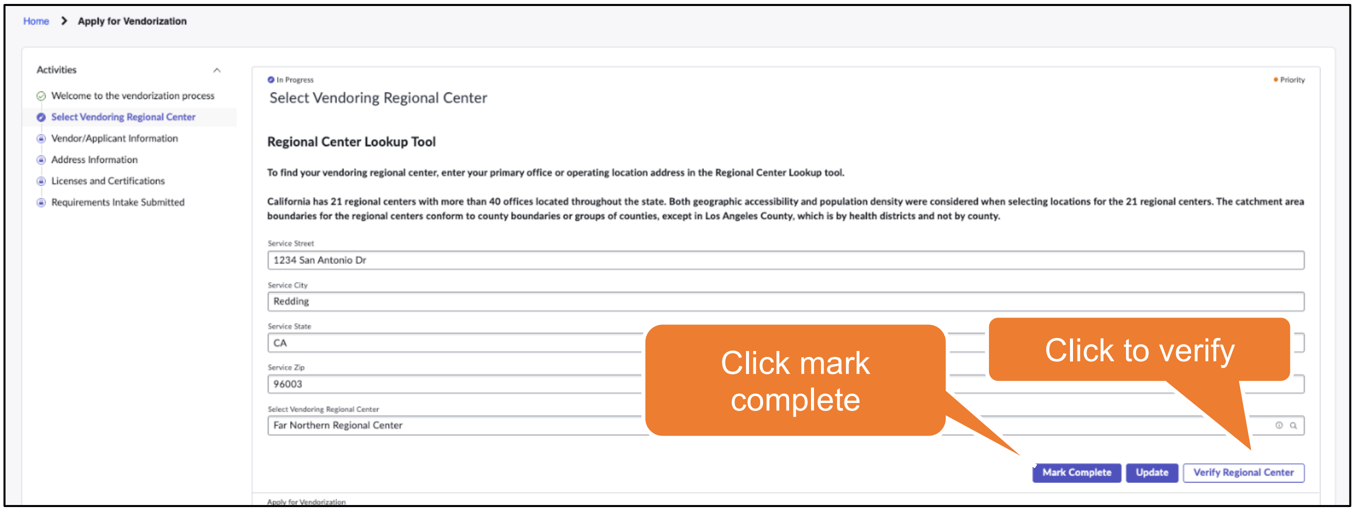


Figure 5.6: Select Vendoring Center

Complete Vendor/Applicant Information

1. **Complete all fields that apply to you and your business**, including required fields. Required fields are marked with an asterisk (*). Guidance is offered for some fields:
    a. Entity type: Use the pull-down list to select the entity type that matches your organization. Scroll down to see all available options.
        i. If you select "Parent or consumers for voucher participant-directed services or purchase reimbursements" one or more additional required fields will appear.
            1. Use the pull-down list to select the option that best matches your relationship to the individual served.
            2. If "family," "friend," or "other" are selected, you will be required to enter the individual's UCI. It is typically a 7-digit number.
    b. Type of Service: Provide an explanation of the service you intend to provide. You may provide the proposed service code in this description.
    c. Category of service: Select the one that best matches your business. This may help the vendoring regional center understand what service you want to provide.
2. Click "Mark Complete."

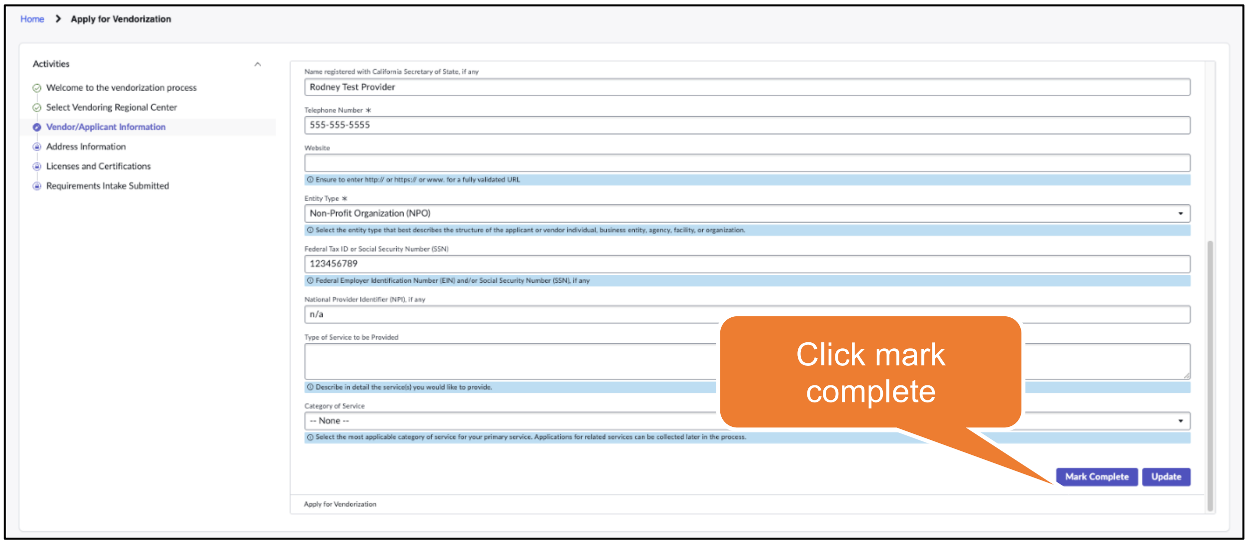


Figure 5.7: Vendor/Applicant Information

Complete Address Information

1. The service address you entered or selected during the “Select Vendoring Regional Center” step will auto-populate.
2. Fill in all remaining required fields:
    a. Service Location County – If you do not know the county, type “unknown.” The correct county will be auto populated during the verify address step (#3).
    b. Service Location Email Address
    c. Mailing address
        i. If mailing address is <u>different</u> than service address, enter mailing street, city, state, zip and county.
        ii. If mailing address is the <u>same</u> as service address, click the button for “service address same as mailing address.”
3. Click “Verify Address”.
4. A pop-up screen will appear with two addresses.
    a. Click “Use New” button to accept the USPS-validated address or click “Keep Old” to keep the information as you entered it.
    b. If your service and mailing addresses are different, you will verify each address separately and in succession.
5. Click “Mark Complete.” This button will not appear until you have verified at least one address.

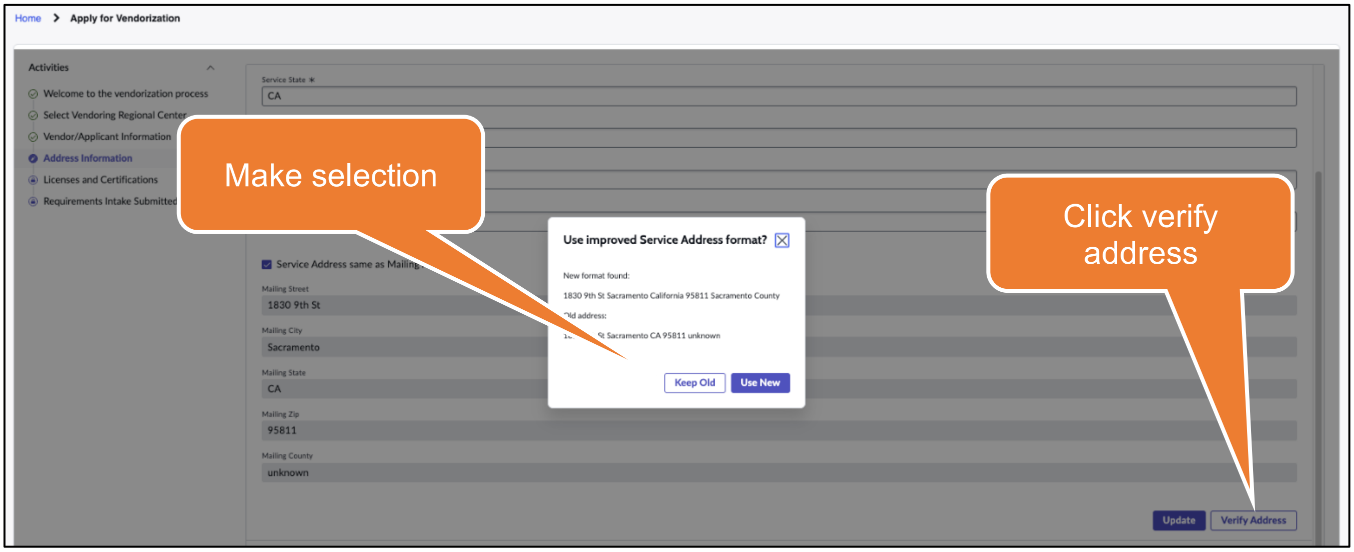


Figure 5.8: Address Information

Licenses and Certifications

1. Review the two questions on the screen and click the box to indicate agreement (Figure 5.9). If they do not apply, leave box(s) unchecked and skip to Step 5.
2. For each checked box, enter document names in the provided fields.
3. Click "+Add file" link and follow steps to upload document(s).
    a. A pop-up will appear with the name of the file in the Title field. You may edit the file name. Preserve the file extension (e.g., .doc). (Figure 5.10)
    b. Click Upload.
4. Once uploaded, the file will appear on the page and be uploaded to Attachments.
5. Click "Mark Complete".

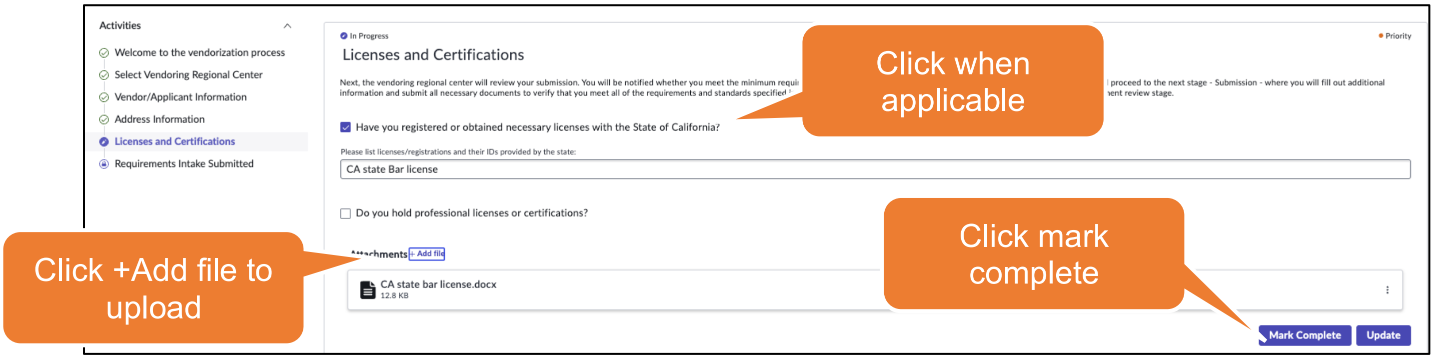


Figure 5.9: Licenses and Certifications

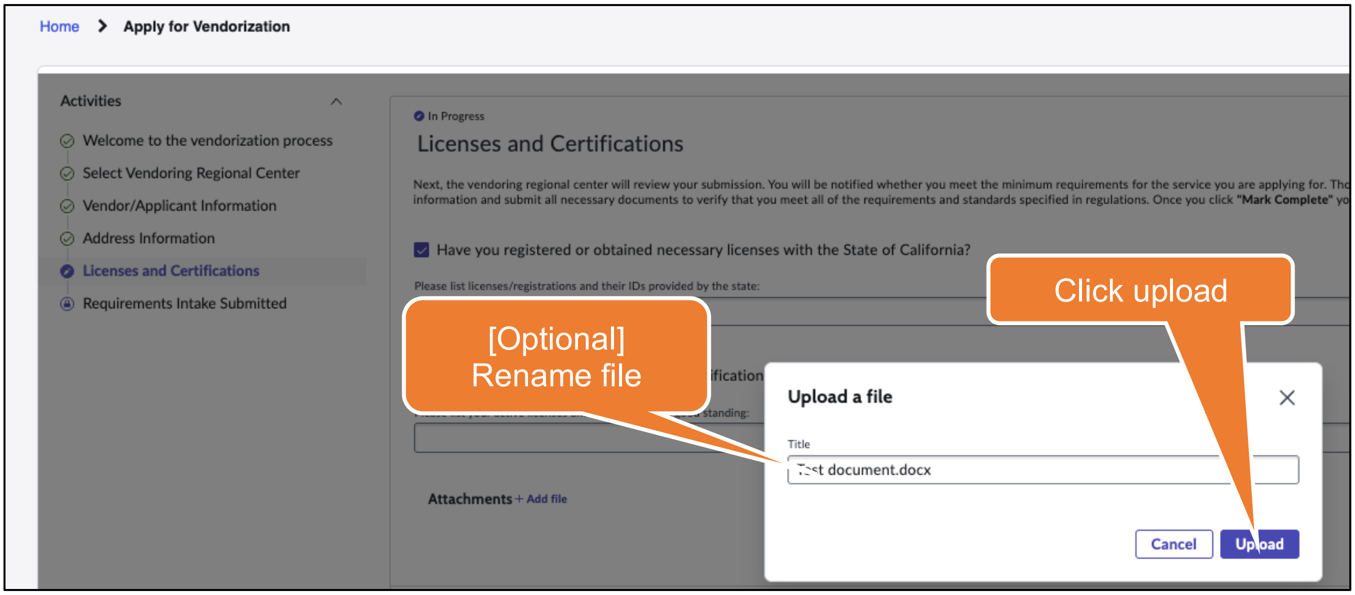


Figure 5.10: Licenses and Certifications: Upload file

The Provider Directory accepts the following file formats: .doc, .docx, .pdf, .xls. .xlsx, .jpeg, .jpg, .png, .ico, .zip, .msg, .csv, .dxf, .dwg, .pbix.

Requirement Stage Decision

After completing all required activities in the Requirements Stage, you'll land on the Case Summary. See Section 4.3 View New Vendorization (NVWN) for an overview of the Case Summary page.

The regional center will review your case and determine whether you currently have the minimum requirements to proceed with the full application.

- If eligible, you will receive an automated email notification, and your case will proceed to the Submission stage.
- If ineligible, you will receive an automated email notification, and your case will be closed.

Missing Information or Documents – Requirement Stage

The vendoring regional center **may** request information or documents from you. Typically, a request will be the result of blank fields or missing attachments that are required for the service you want to provide.

Notification

Your regional center will either:

- Post a comment in activity stream of the case summary, which will send an automated email notification.
- Send you an email requesting information or documents needed.

Next step

1. Navigate to the case summary. (Figure 5.11) Review Activity stream.
2. Type response in the message box. Click Post button.
3. To submit a document, click the paperclip and follow the steps.

Your prompt response to their request for missing information or documents is imperative to enable the regional center to render a decision within the processing time requirements.

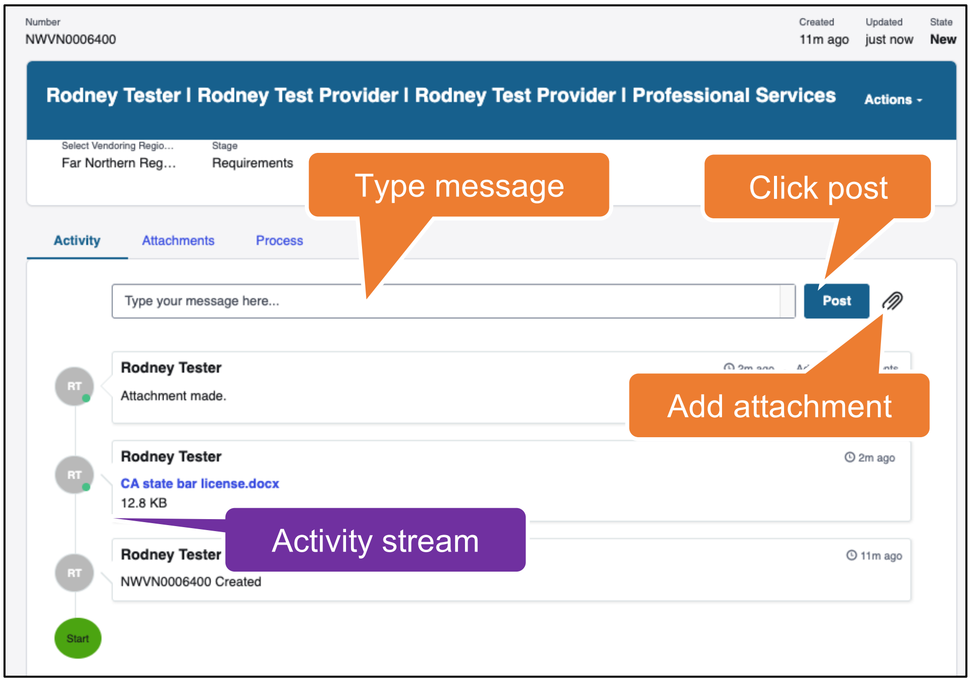


Figure 5.11: Case Summary

5:2 Submission Stage

If you met Requirements eligibility you will receive an email from the vendoring regional center informing you of their decision. Your case will progress to the Submission stage.

> Each time that you click on a case that is in a state of “Awaiting Info,” a green banner will appear at the top of the page that reads, “This case requires additional information from you.”

Additional Information

1. Log in to Provider Directory.
2. On the homepage, select My Requests.
3. Locate the case on the list (Figure 5.12). The case will be in Submission Stage and Awaiting Info State.

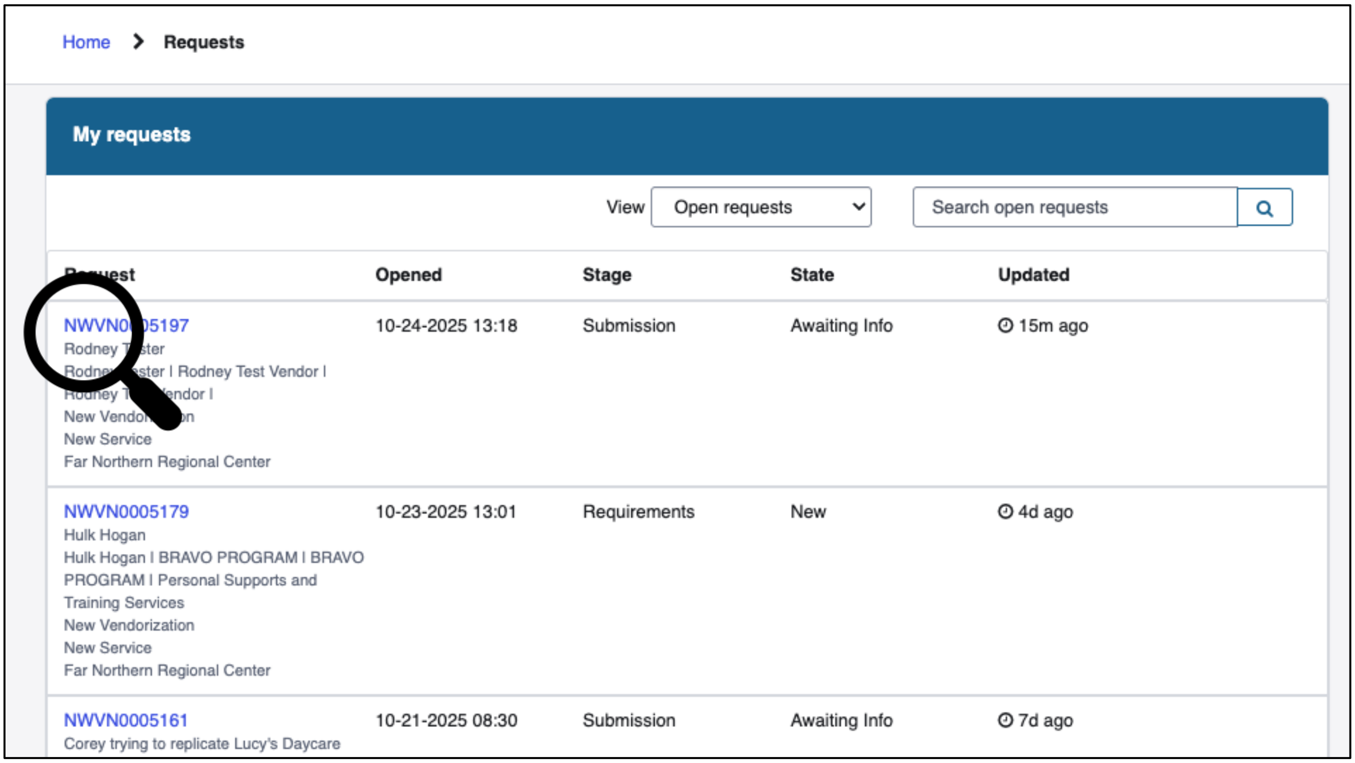


Figure 5.12: My Requests: Open Requests

4. Click on the case ID link. You will land on the Case Summary and Activity Stream.

5. Click the Process tab. You will note the stage has changed to “Submission” in the visual tracker at the top of the page. (Figure 5.13)
6. Complete **all** fields in Additional Information.
    a. **If the field does not apply, type “n/a.”**
    b. Date of Birth (DOB): To complete you can type either type the date, in the required format, or select the date from the calendar and click “Ok.” Tip: If your birth year is not available in the calendar, chose any year, click ok, and then manually update.
    c. Languages of service delivered: Click the field. A list of 91 languages will appear. Scroll down and click each applicable language. To remove one, click the “x” at the end of the language bubble. Note: “English” is not on the list. This list is intended to report additional languages served.
7. Click “Mark Complete.”

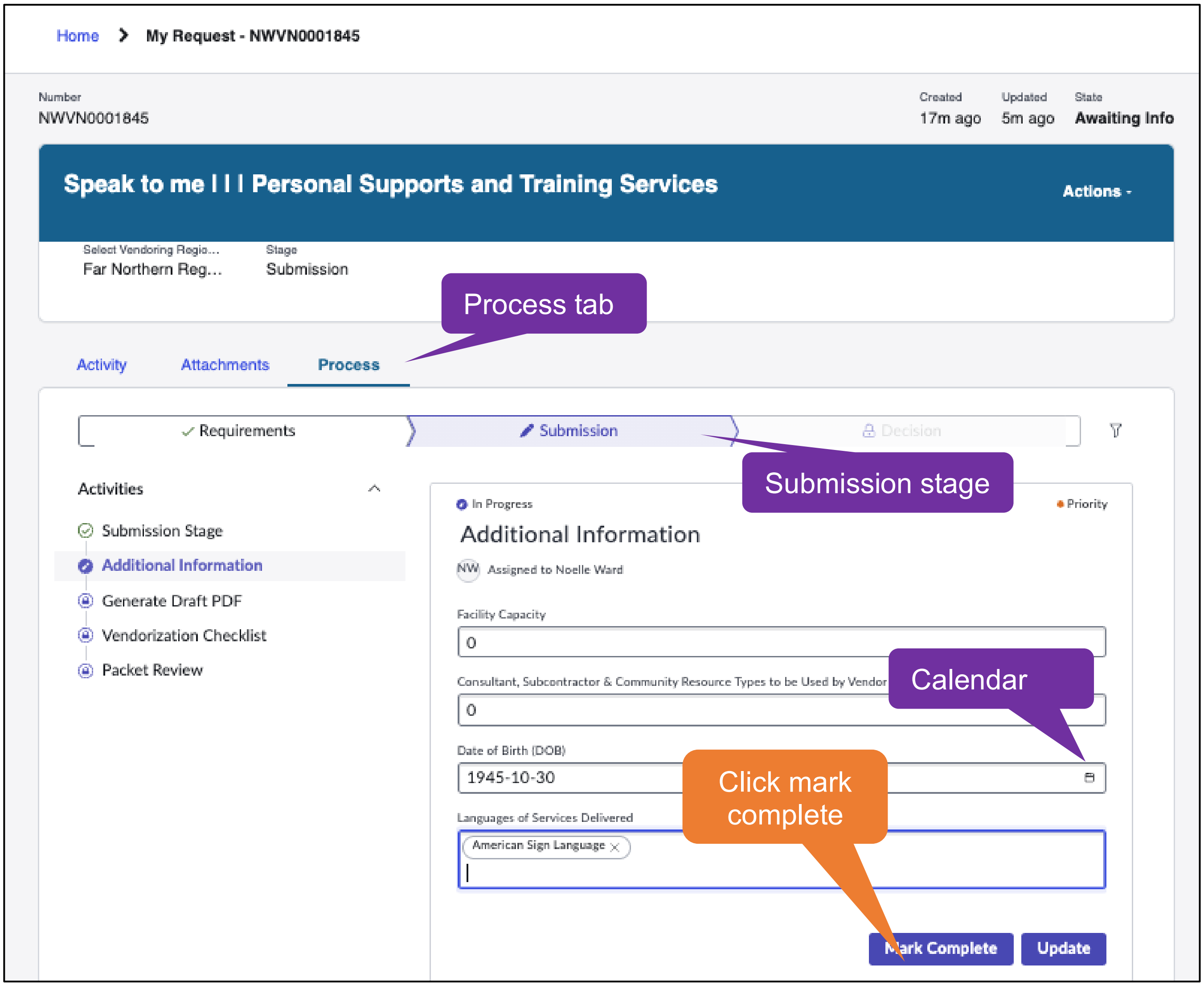


Figure 5.13: Process Tab: Additional Information

Following the vendoring regional center’s “meets requirements” selection, the regional center will issue a checklist of documents to submit for the service you would like to vendor for. This step is part of their 15-day processing time requirement.

Drafts of the Vendor Application (DS 1890) and Applicant/Vendor Disclosure Statement (DS 1891) will be generated from the information that you submitted. The documents will be populated to Attachments.

Vendorization Checklist

1. Login to Provider Directory and click “My Request” on the home page.
2. Locate your case on the My Requests table and click the case link.
3. Click the Process tab (Figure 5.14).
4. Review the vendorization checklist. If any of the required forms are unfamiliar or you’re unsure where to locate the fillable template, **contact your vendoring Regional Center for guidance** before proceeding..
5. Do not request Vendor Application (DS 1890) and Applicant/Vendor Disclosure Statement (DS 1891) from the vendoring regional center. Instead, these will be generated and signed as part of the vendorization process. Scroll down to “e-sign DS 1890 and DS 1891” section for steps to complete these forms.
6. When a document is complete, scanned and ready for upload, navigate to any of the tabs in case details to upload a form:
    a. Activity tab: Click the paper clip and follow the steps. (Figure 5.11)
    b. Attachments tab: Click the paper clip and follow the steps. (Figure 5.16)
    c. Process Tab: Scroll down to bottom of the page and click “+Add File” and follow the steps. Note: Using this option allows you to rename the file before you upload it. (Figure 5.14)
7. After an attachment has been uploaded, mark the checkbox on the list. Note: The regional center can view checklist activity in real time, allowing for immediate visibility into progress.
8. Repeat steps 5 and 6 for each item on the checklist.

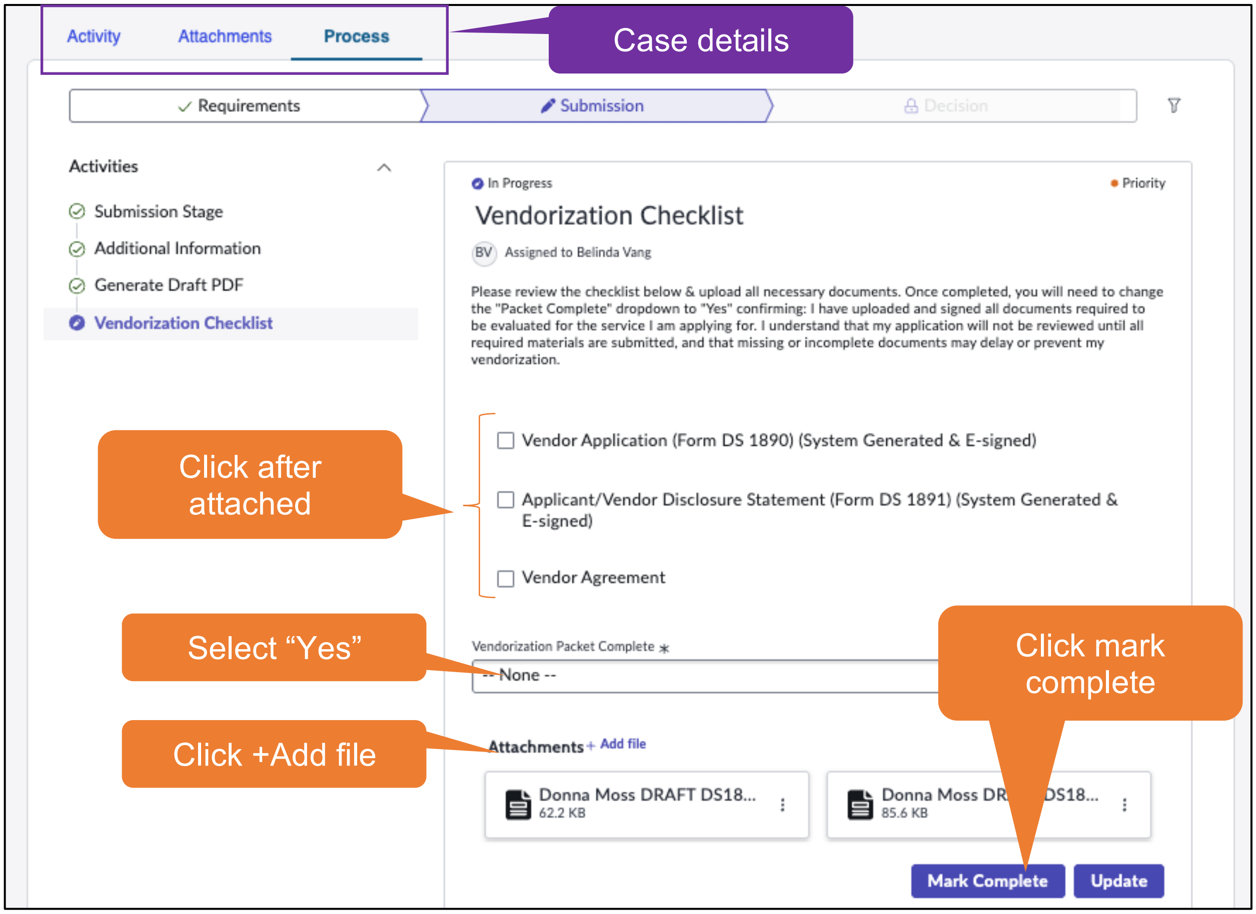


Figure 5.14: Process Tab: Example Checklist

E-sign DS 1890 and DS 1891

The process to complete and sign Vendor Application (DS 1890) and Applicant/Vendor Disclosure Statement (DS 1891) consists of several steps, some automated and some manual. The following diagram represents all the steps. Applicant's steps are listed in text below the visual.

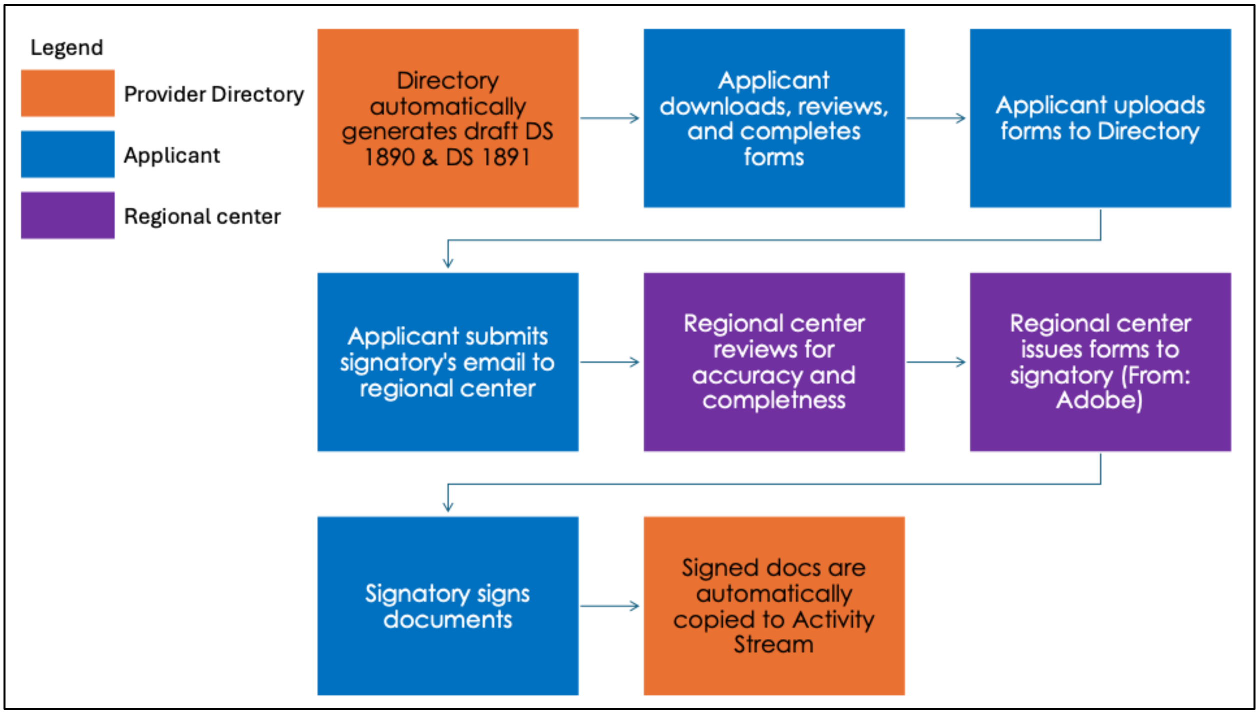


Figure 5.15: E-sign Process

Prepare for Signature

The draft Vendor Application (DS 1890) and Applicant/Vendor Disclosure Statement (DS 1891) are automatically generated and loaded into Attachments. The forms are populated with information you provided in the digital application. In this activity, you will prepare the documents for signature but not yet sign them.

1. Login and click “My Request” on the home page.
2. Locate your case on the My Requests table and click the case ID link.
3. Click the Attachments tab. (Figure 5.16).
4. Locate the draft versions of the DS 1890 and DS 1891, as indicated by the word “DRAFT” in the title. Click each one to download them to your computer.
5. Locate the downloaded files.

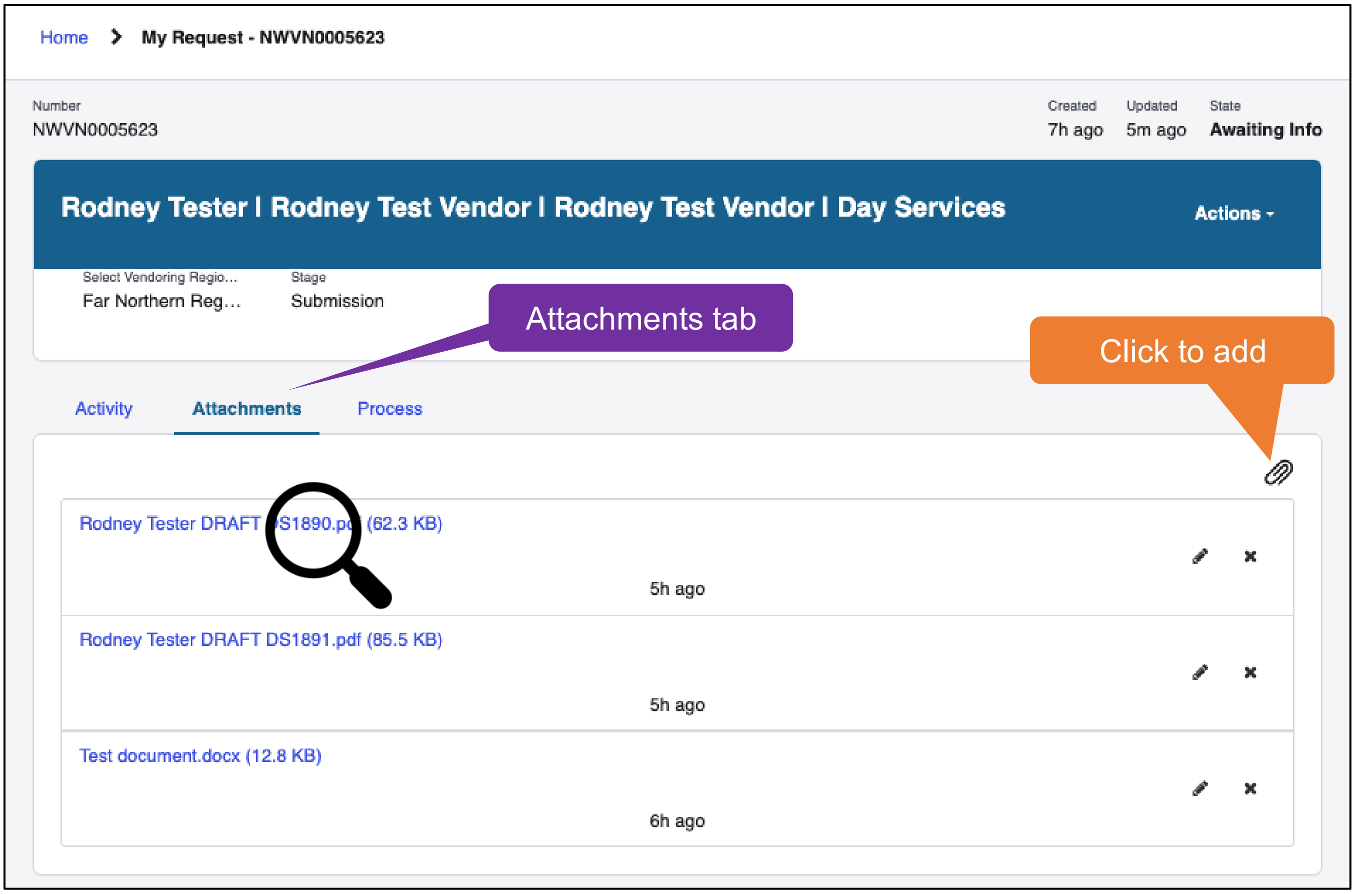
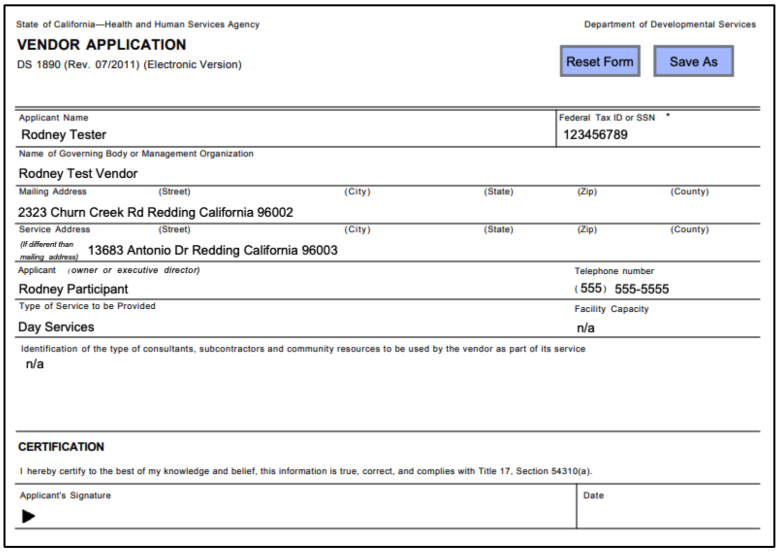


Figure 5.16: Attachments Tab: DS 1890 and DS 1891

6. Open the DS 1890 (Figure 5.17) and review it to ensure it is accurate and complete. If is incorrect, contact the regional center for next best action.



State of California—Health and Human Services Agency

Department of Developmental Services

VENDOR APPLICATION

DS 1890 (Rev. 07/2011) (Electronic Version)

Reset Form | Save As

Applicant Name Rodney Tester	Federal Tax ID or SSN * 123456789
Name of Governing Body or Management Organization Rodney Test Vendor	
Mailing Address (Street) (City) (State) (Zip) (County) 2323 Churn Creek Rd Redding California 96002	
Service Address (Street) (City) (State) (Zip) (County) (If different than mailing address) 13683 Antonio Dr Redding California 96003	
Applicant (owner or executive director) Rodney Participant	Telephone number (555) 555-5555
Type of Service to be Provided Day Services	Facility Capacity n/a
Identification of the type of consultants, subcontractors and community resources to be used by the vendor as part of its service n/a	

CERTIFICATION

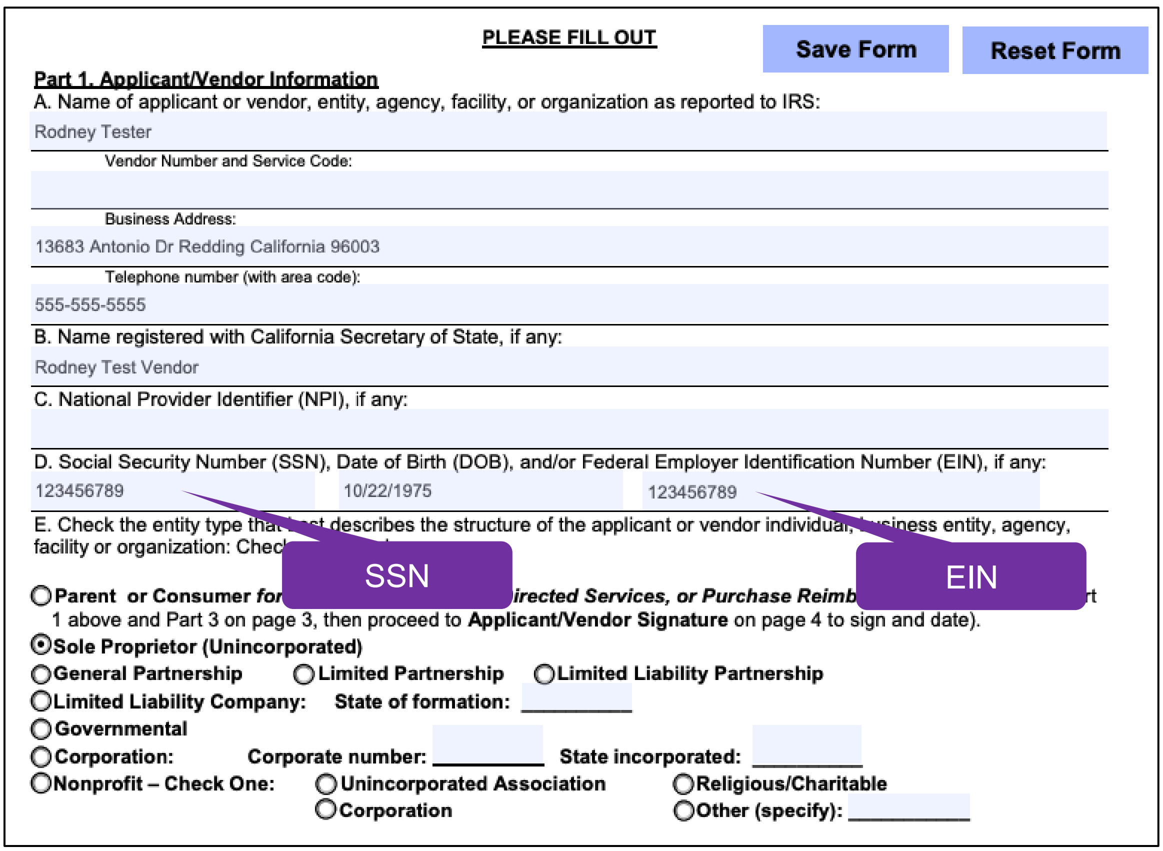
I hereby certify to the best of my knowledge and belief, this information is true, correct, and complies with Title 17, Section 54310(a).

Applicant's Signature ▶	Date

Figure 5.17: DS 1890

7. Open the DS 1891:
    a. Review it to ensure Part 1 (Figure 5.18) is accurate and complete. If needed, fill in or correct any information. You can only update grey-blue fields. The number you entered for “Federal Tax ID or Social Security Number (SSN)” in the application will automatically populate both the “Social Security Number (SSN)” and “Employer Identification Number (EIN), if any” fields in the DS 1891 form.
    Review both fields and delete the one that does not apply.
    b. As applicable, complete Part 2-4 (Figure 5.19) by filling in the grey-blue boxes. If you require more space than the form allows, record the additional information in a spreadsheet document and upload that file via attachments. Tip: Use DS 1891 in the file name.
    c. Complete the Applicant/Vendor Signature Section (Figure 5.20), but do not attempt to sign it. Signatures will be collected after the vendoring regional center has reviewed both forms.

> **!** Changes made to DS 1891 do not auto-populate to your case. Inform your regional center of changes and submit a change request after the application has been approved and the vendor record has been created in Provider Directory.



PLEASE FILL OUT

Save Form | Reset Form

Part 1. Applicant/Vendor Information

A. Name of applicant or vendor, entity, agency, facility, or organization as reported to IRS:
Rodney Tester

Vendor Number and Service Code:

Business Address:
13683 Antonio Dr Redding California 96003

Telephone number (with area code):
555-555-5555

B. Name registered with California Secretary of State, if any:
Rodney Test Vendor

C. National Provider Identifier (NPI), if any:

D. Social Security Number (SSN), Date of Birth (DOB), and/or Federal Employer Identification Number (EIN), if any:
123456789 | 10/22/1975 | 123456789

E. Check the entity type that ... describes the structure of the applicant or vendor individual, ...siness entity, agency, facility or organization: Check ...

○ **Parent or Consumer for** ... ***irected Services, or Purchase Reimb*** ... rt 1 above and Part 3 on page 3, then proceed to **Applicant/Vendor Signature** on page 4 to sign and date).
◉ **Sole Proprietor (Unincorporated)**
○ **General Partnership** ○ **Limited Partnership** ○ **Limited Liability Partnership**
○ **Limited Liability Company: State of formation:** ________
○ **Governmental**
○ **Corporation: Corporate number:** ________ **State incorporated:** ________
○ **Nonprofit – Check One:** ○ **Unincorporated Association** ○ **Religious/Charitable**
○ **Corporation** ○ **Other (specify):** ________

Figure 5.18: DS 1891: Part 1

Part 2. Ownership, indirect ownership, and managing employee interests (If not applicable, please indicate.)

A. List the name(s), title(s), address(es), SSNs, and DOBs of individuals for organizations having direct or indirect ownership interests, and/or managing employees in the applicant/vendor (see instructions for definitions). Also list all members of a group practice. Attach additional pages as necessary to list all officers, owners, management and ownership individuals and entities.

Name	Title	Address	SSN	DOB

B. List those persons named in **'A'** above or **'Part 4. A'** below, that are related to each other as spouse, parent, child, or sibling.

Name	Relationship	Address

C. List the name, address, vendor number and service code, SSN, NPI and/or EIN of any other applicant or vendor in which a person with an ownership or controlling interest in the applicant or vendor also has an ownership or control interest of at least 5 percent or more. For example: Are any owners of the applicant or vendor also owners of Medicare or Medicaid facilities? (Example: sole proprietor, partnership or members of Board of Directors.)

Name	Address	Vendor Number and Service Code	SSN, NPI and/or EIN

Part 3. Excluded Individuals or Entities (If not applicable, please indicate.)

List the name, title, and address of any person, as applicant or vendor, or entity with an ownership or control interest, any agent, director, officer, or managing employee of the applicant or vendor who is an excluded individual or entity, as defined on page 2.

Name	Title	Address

Part 4. Subcontractor (If not applicable, please indicate.)

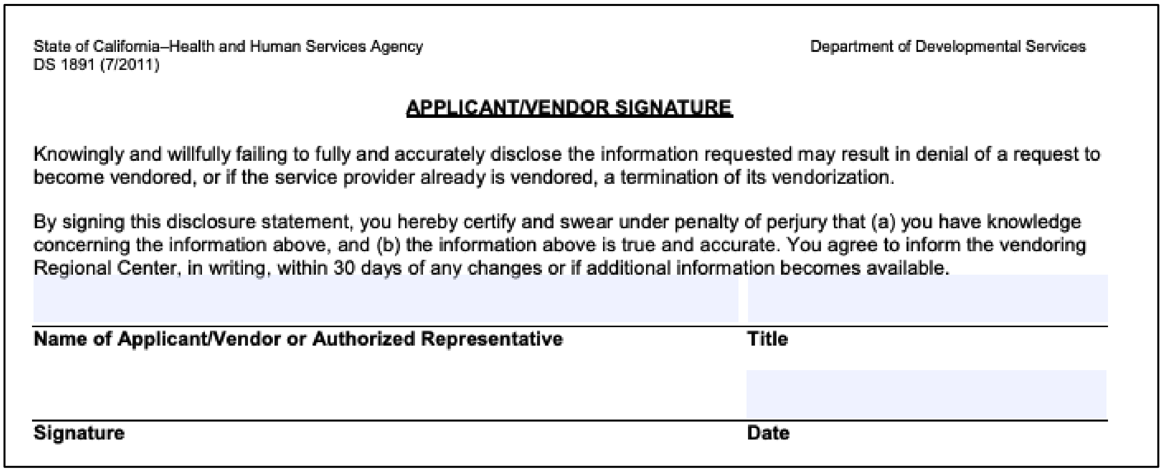
A. List the name, title, address, SSN, NPI and/or EIN of each person or entity with an ownership or control interest **in any subcontractor** in which the applicant or vendor has direct or indirect ownership of 5 percent or more. State percentage.

Name	Title	Address	Percentage	SSN, NPI and/or EIN

B. List the name, title, address, SSN, NPI and/or EIN of each **subcontractor or wholly owned supplier** in which the applicant or vendor has had any significant business transactions within 5 years of the application or request.

Name	Title	Address	SSN, NPI, and/or EIN

Figure 5.19: DS 1891: Part 2



State of California–Health and Human Services Agency
DS 1891 (7/2011)

Department of Developmental Services

APPLICANT/VENDOR SIGNATURE

Knowingly and willfully failing to fully and accurately disclose the information requested may result in denial of a request to become vendored, or if the service provider already is vendored, a termination of its vendorization.

By signing this disclosure statement, you hereby certify and swear under penalty of perjury that (a) you have knowledge concerning the information above, and (b) the information above is true and accurate. You agree to inform the vendoring Regional Center, in writing, within 30 days of any changes or if additional information becomes available.

Name of Applicant/Vendor or Authorized Representative	**Title**
Signature	**Date**

Figure 5.20: DS 1891: Applicant/Vendor Signature

8. Locate the finalized forms on your computer.
9. Rename the file, removing “DRAFT” from the title. This will help the vendoring regional center know which version to send for signature.
10. Upload both documents via either method:
    a. Activity tab: Click the paper clip and follow the steps.
    b. Attachments tab: Click the paper clip and follow the steps.
11. Navigate to Activity tab (Figure 5.21). In the dialogue box, type a message to your vendoring regional center informing them of the email of the authorized signer of the DS 1890 and DS 1891, and click “Post”.
12. [Optional] You may include email(s) of those who you’d like copied.

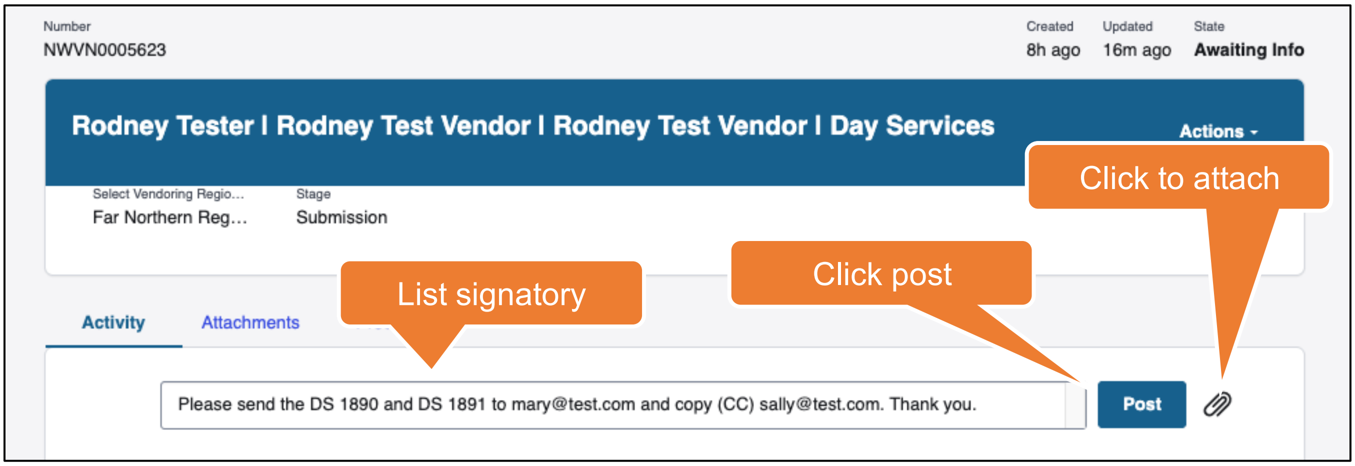


Figure 5.21: Activity: Signatory

Note: Your vendorization checklist is not complete until the vendoring regional center receives your signed DS 1890 and DS 1891. **Scroll down to “Electronic Signature” section for steps for signatory.**

Electronic Signature

The designated signatory will receive an email from adobesign@adobesign.us with a subject line, “Signature requested on ‘New Agreement’.” The following are steps for the signatory.

1. Click the “Review and sign” blue bubble in the email.
2. Click “Continue” to agree to the Terms of Use, Consumer Disclosures and use of electronic signatures.
3. Review **all** information in the DS 1890 and DS 1891 to ensure they are complete and accurate.
    a. If the information in both documents is accurate and complete, proceed to step 4.
    b. If the information in either document needs correction, **do not sign.** Make edits to the modified form(s) and upload updated attachment. Notify the regional center.
4. Complete the required fields, sign and click “Apply.” The form will guide you to required fields and signatures.
5. Click “Submit.”

The signed (i.e., final) DS 1890 and DS 1891 will be automatically uploaded, as one document, to the case and visible in the activity stream. Adobe will also email a signed copy to the signatory. The case State will change from “Awaiting Info” to “Open.”

Electronic Copy

The individual(s) who were identified to receive copies will receive two emails from adobesign@adobesign.us:

- When the documents are generated for signature. The subject line says, “ServiceNow AdobeSign API has copied you on New Agreement,”.
- After the documents are signed. The subject line says, “You signed: ‘New Agreement’.”

Changes needed to DS 1890 or DS 1891

The DS 1890 and DS 1891 are populated with information reported by the applicant in the Requirements Stage and the additional information activity in the Submission stage. Once the regional center determines whether an applicant Meets Requirements or Does Not Meet Requirements, the data is locked. This action precedes the automated creation of the forms.

- The DS 1890 **cannot** be edited. Contact the regional center to learn next best action.
- The DS 1891, however, can be edited. If the signatory cannot sign it in its current state, we recommend editing the modified DS 1891 and uploading the updated version for the regional center to re-issue to the signatory. Tip: Rename the file to designate it is different than draft and modified versions.

Complete Vendorization Checklist

1. When all documents have been uploaded, the DS 1890 and DS 1891 have been signed, and the checkboxes have been marked, select the pull down to Vendorization Packet Complete and select “Yes.”
2. Click “Mark Complete.”

Missing Information or Documents – Submission Stage – 30 Days to Respond

If your submission is incomplete, the vendoring regional center will request information or documents from you. They will notify you. **You have 30 calendar days to provide the information they request.** You will receive an email reminder 2 calendar days before your processing time requirement expires.

Notification

Your regional center will either:

- Post a comment in activity stream of the case summary, which will send an automated email notification.
- Send you an email requesting information or documents needed

Next step

1. Navigate to the case summary. (Figure 5.11) Review Activity stream.
2. Type response in the message box. Click Post button.
3. To submit a document, click the paperclip and follow the steps.

The case will be in the Awaiting Info state until the regional center indicates that they received the requested information from you.

5:3 Decision Stage

Your application has reached the Decision stage, as shown below (Figure 5.22).

The regional center will review all documents submitted and make one of two decisions:

1. Approve – If approved:
   a. You will receive an approval notice via email which will include your vendor number and other key information about your vendorization.
   b. The case will be closed and a vendor record will be created in the Provider Directory.
   c. Your vendorization documents will be moved to your vendor record and accessible by regional center staff.

2. Deny – If denied:
   a. You will receive a denial notice via email with rights to appeal the decision.
   b. The case will be closed.
   c. Your vendorization documents will remain attached to your closed case. You can access your closed case in My Requests.

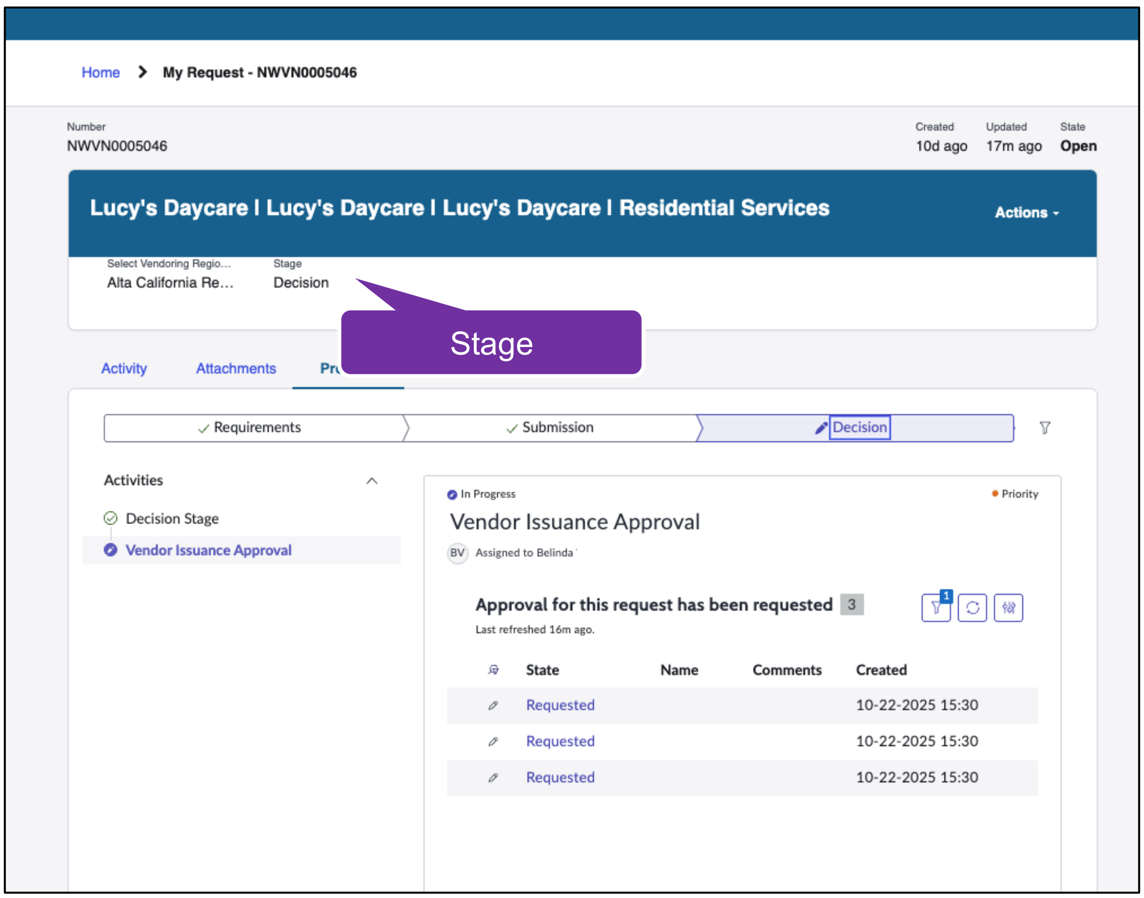


Figure 5.22: Process Tab: Decision Stage

> The number of rows in the table labeled, "Approval for this request has been requested," represents the number of regional center staff that can act on your case.

5:4 Vendorization Maintenance & Troubleshooting Tips

Document Maintenance

At any time, you can add, remove, or rename a document in your case. Importantly, a complete and accurate file is needed for a vendoring regional center to process the application. While the system logs activity, entries for removed and renamed attachments do not include the file name. Inform the vendoring regional center of any changes you've made.

1. Log in. Click My Requests.
2. On the My Requests table locate your case.
3. Click the case ID link.
4. Click the Attachments tab (Figure 5.23)
5. To **add** a document:
    a. Click the paperclip and follow the onscreen steps to choose a file or drag and drop.
    b. A green banner will appear at the top of the page, "[name of document] attached." The system will record, two entries in the activity stream:
        i. "[person] [file name]"
        ii. "[person] added attachment"
6. To **remove** a document:
    a. Click the "x" on the right of the screen for the attachment listed.
    b. A pop-up will appear that says, "Delete Attachment?" Click Ok.
    c. A green banner will appear at the top of the page, "Attachment deleted successfully." In the activity stream, the system will record, "[person] deleted attachment." Note: it does not inform which attachment was deleted.
7. To **rename** a document:
    a. Click the pencil icon.
    b. The file name will change into an editable text box. Make the edit. Click outside the text box for the change to apply.
    c. A green banner will appear at the top of the page, "Attachment renamed successfully." In the activity stream, the system will record, "[person] renamed an attachment." Note: it does not inform which attachment was renamed.

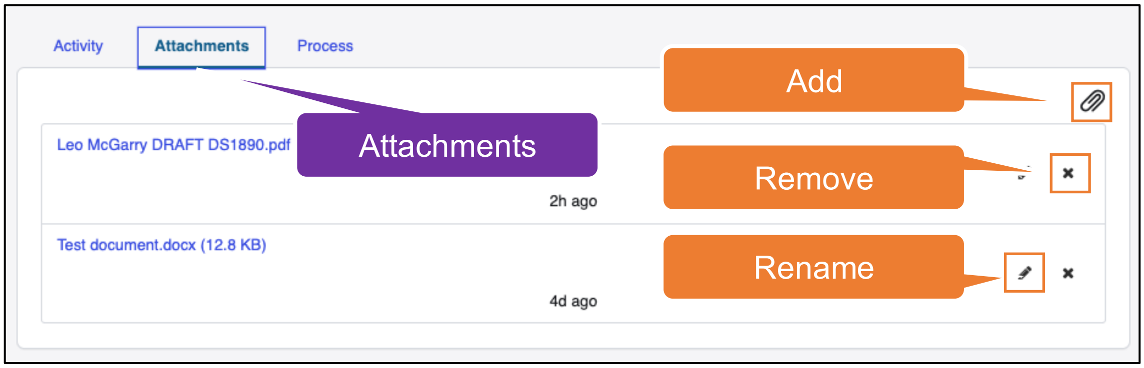


Figure 5.23: Attachments Tab: Add, Remove, Rename

Automatically Logged Out

The Provider Directory will log you out after **30 minutes** of inactivity. If you were working, please follow these steps to resume your work.

1. Log in.
2. Click My Requests
3. On the My Requests table, locate your case. (Figure 5.24)
4. Click the case ID link.
5. Click the Process tab and pick up where you left off. Look for the activity just below the last green checkbox. (Figure 5.25). That is your next step.
6. Note: If you have not yet completed the Requirements stage submission. Your case will be in the Profile Stage and in a Draft State, which precedes Requirements Stage.

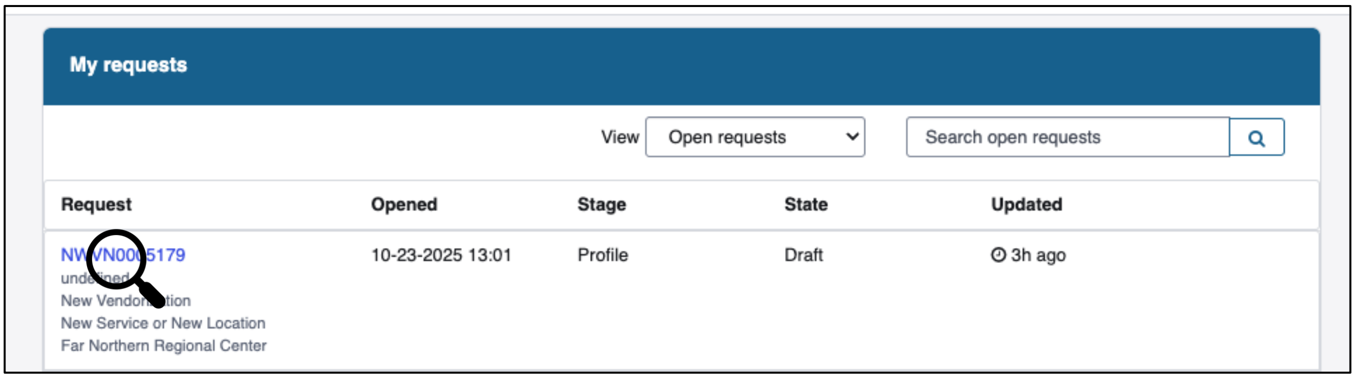


Figure 5.24: My Requests: Draft Status

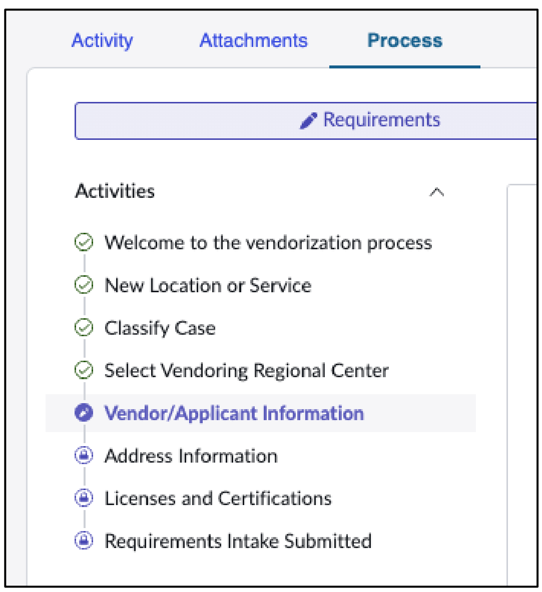


Figure 5.25: My Requests: Incomplete Activities

Module 6 – 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**.

Access to Provider User Management, is accessible to users with the PD Provider Admin role and accessible via 1) Provider Support tab, 2) Quick Links, and 3) Support Category within Provider Services. You will be directed to the PD - User Management table (Figure 6.1). User management is only available to an organization once a minimum of one approved vendorization is in Provider Directory.

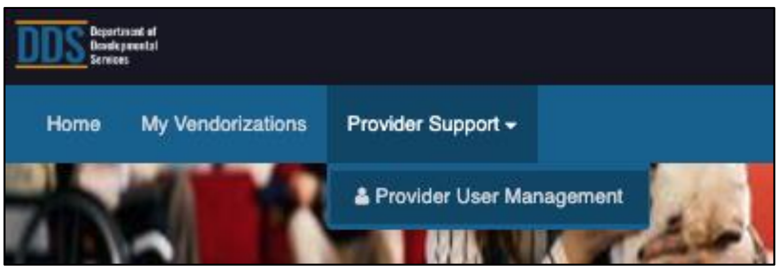


Figure 6.1: Provider User Management

6:1 Add user

1. Click add button (Figure 6.2).
2. In the pop-up window (Figure 6.3), complete all required fields (marked with red *) and click the "Add" button.
3. Click **Submit** in the top right corner on the subsequent page (Figure 6.2) to add the user. Note: 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.

6:2 Remove user

1. Select the "x" next to the user's name in the actions column.
2. When prompted to delete the row (Figure 6.4), click "Remove."
3. You will see the user removed on the refreshed screen.
4. Click **Submit** in the top right corner on the subsequent page (Figure 6.2) to remove the user. Note: 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.

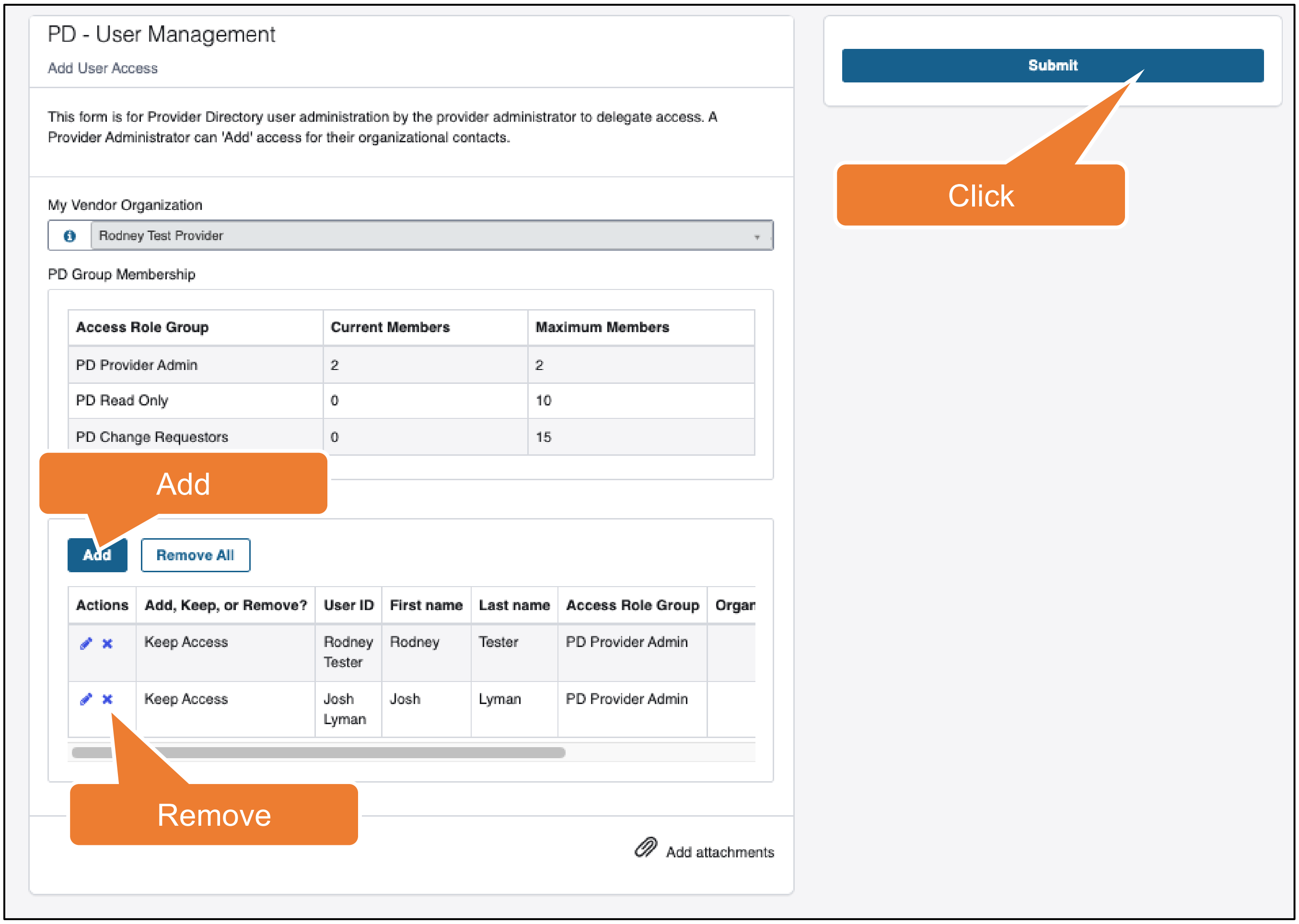


Figure 6.2: PD - User Management

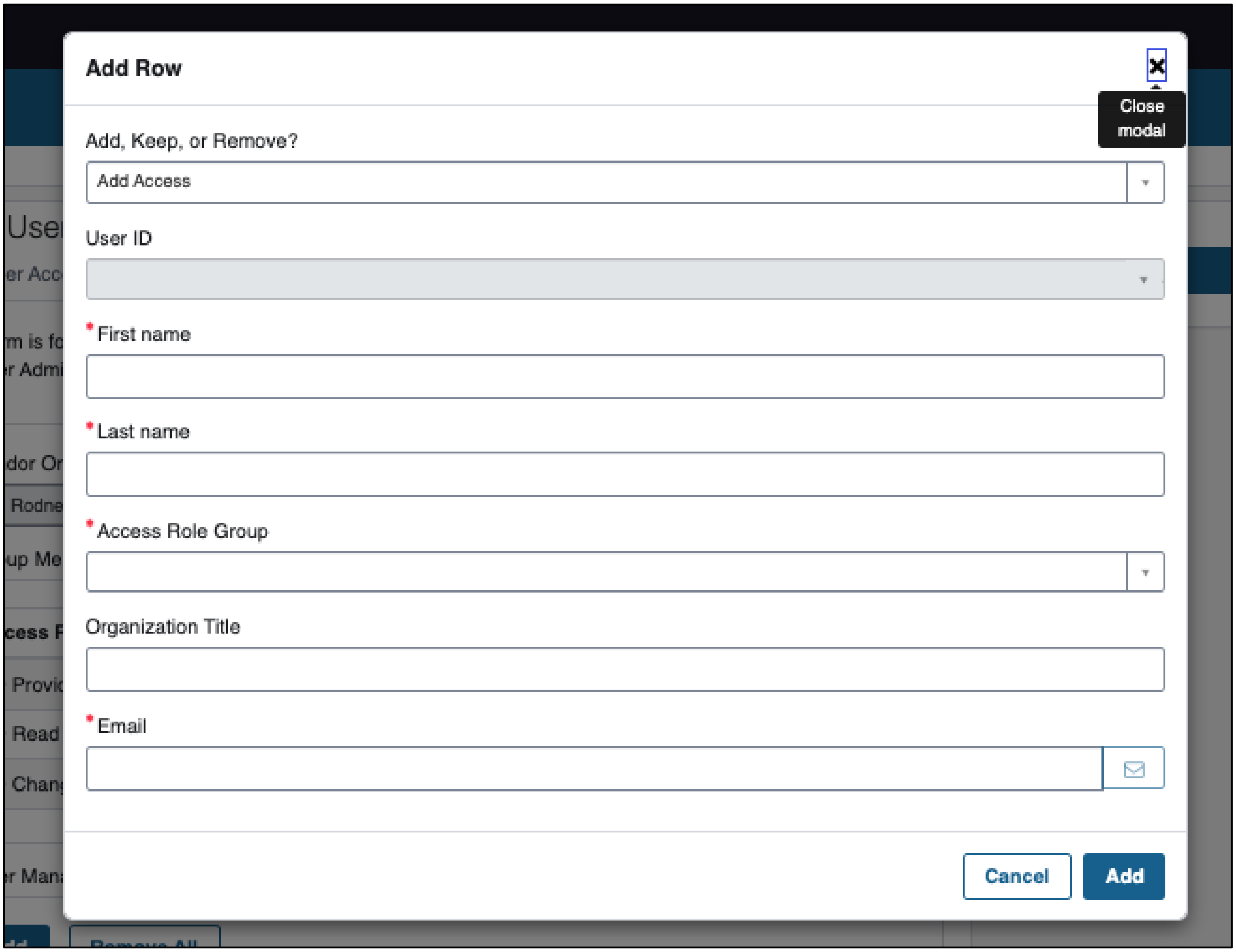


Figure 6.3: PD User Management – Add User

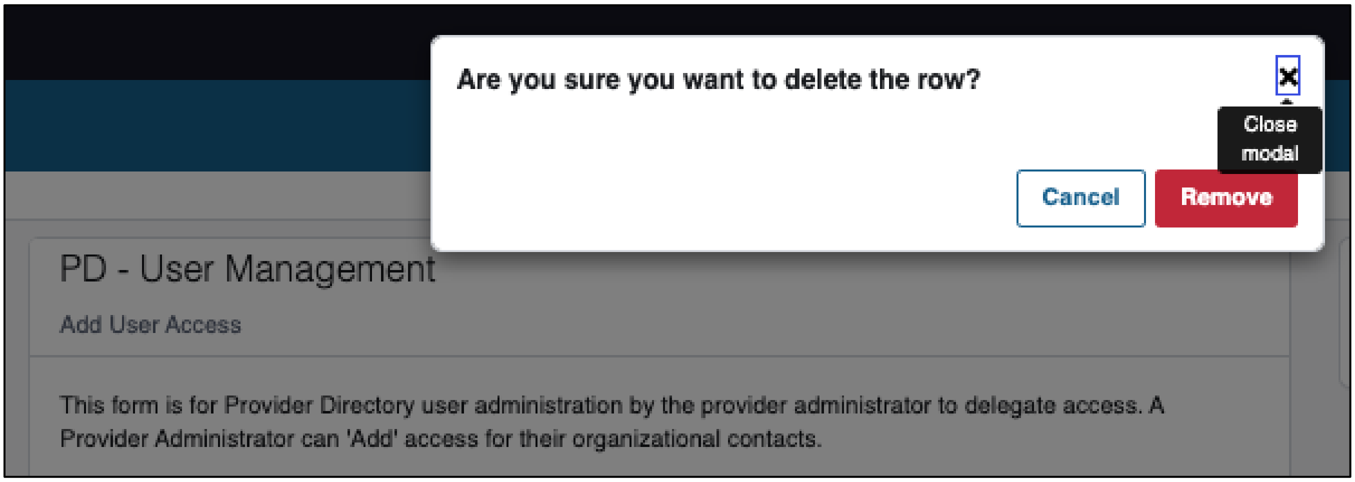


Figure 6.4: PD User Management – Remove User

Module 7 – Close Case

This module will walk you through how to close a case.

1. Click My Requests on home page.
2. On the My Request table, locate your case and click the case ID link.
3. Depending on case type, you will be directed to the View or Update Vendor Record page (Figure 7.1) or My Request page (Figure 7.2).
4. Click the actions button and select "Close Case."
5. A pop-up message will appear asking you to confirm that you want to close this case.
6. Click "close case" button.

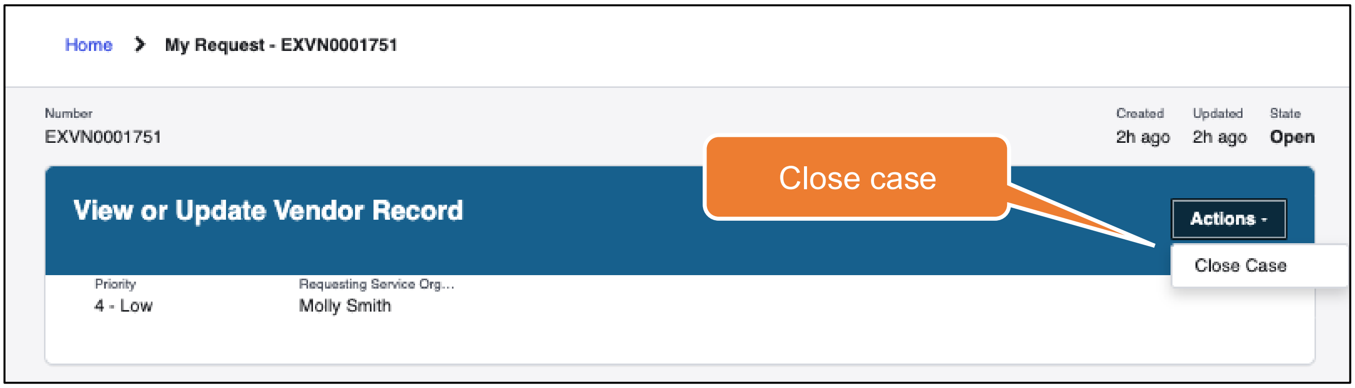


Figure 7.1: View of Update Vendor Record – Close Case

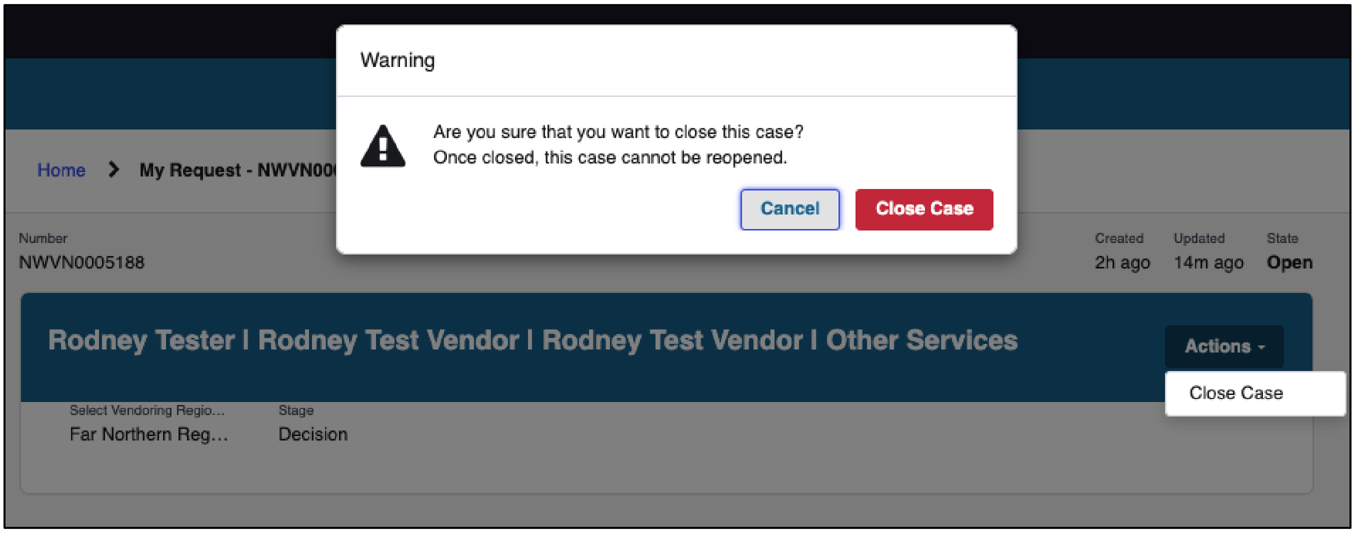


Figure 7:2: My Request: Close Case

The case's State will change to Closed and a message will be added to the activity stream, "Closed by customer." The case is closed and will appear in closed case in My Requests table. If it was a vendor record change case (EXVN), the record's request status will change to "not started," allowing the record to be resubmitted.

Module 8 - Export

Most tables can be exported in an Excel or CSV file format.

1. Select applicable table: My Vendorizations, My Vendor Records, [vendor] Service Codes, [vendor] All Submitted Records.
2. Click on the hamburger icon in the top left corner of the table. (Figure 8.1)
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.

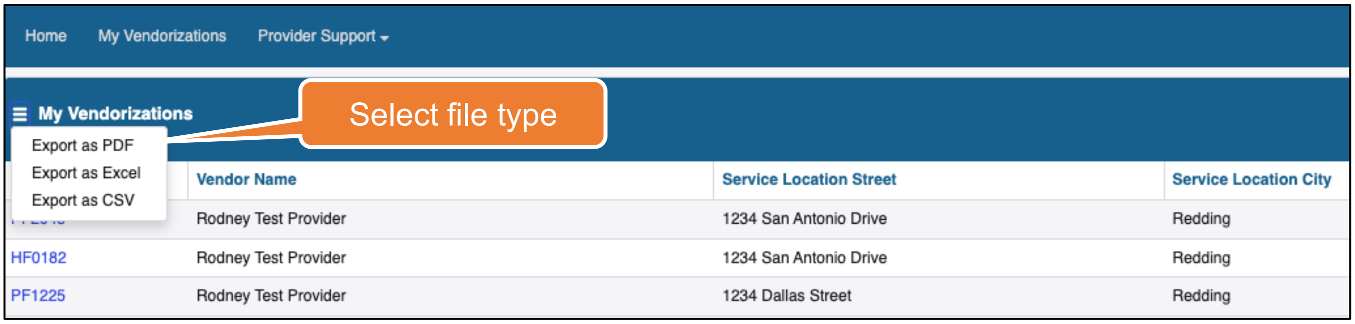


Figure 8.1: My Vendorizations.- Export

Module 9 – View or Update Parent Organization Information

"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.

The parent record is created at or alongside the creation of the child record. To view the child record see Module 2. If there is a change to the parent organization information, you can submit a change request.

9:1 View Information

1. From the dashboard, click Provider Services.
2. Click the widget labeled, "View or Update **Parent**…" (Figure 9.1)
3. Review the parent organization information. (Figure 9.2).

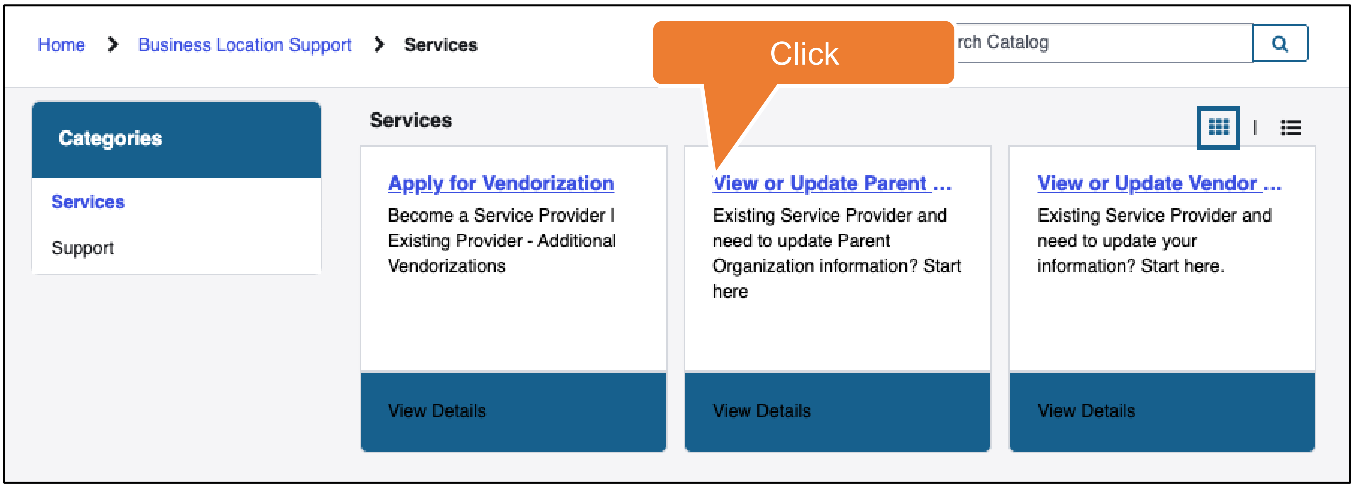


Figure 9.1: Provider Services

9:2 Submit Change

1. Make edits. Editable fields begin with the word "change" and have a white background. You can also submit a comment.
2. Click Submit button.

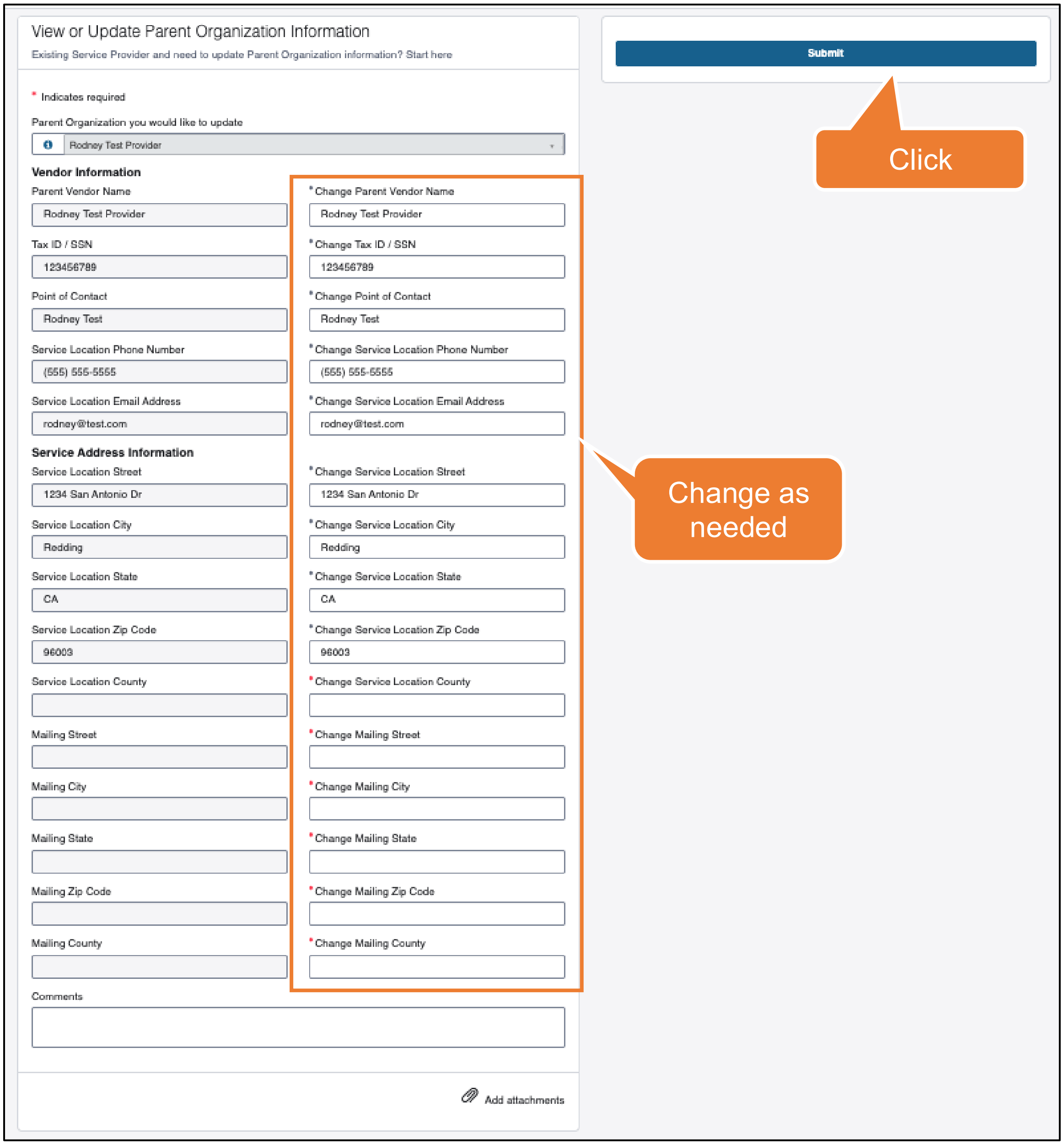


Figure 9.2: Parent Organization Information

9:3 Approval Process

The parent organization information approval process is very similar to the vendor record change process, but the request is processed by DDS Provider Directory staff, as opposed to regional center staff, and there are just three possible responses.

DDS Response Option	Service Provider Response
Approved with no modifications	Approved. No action to take.
Approved with modifications	Approved. Review comments to learn next steps. Resubmit.

Rejected with corrections needed	Rejected. Review comments to understand the reason for the rejection and learn next steps. Resubmit.

Email notifications

You will receive one or more email notifications during the approval process:

- One following case creation. Note: The email says your case will be reviewed by the regional center. Your request will be processed **by DDS**.
- One following approval or denial of request. If your case is rejected, the reason will be included in the email.
- If applicable, when regional center posts a comment.

Questions?

If you have questions about the vendorization process, please contact your vendoring regional center. If you have technical questions, please contact ProviderDirectory@dds.ca.gov.