

# How to use the Provider Directory

## APPLICANTS & SERVICE PROVIDERS

**Created by the Department of  
Developmental Services for Service  
Providers**

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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

A callout box with a grey arrow pointing to the word 'Action' inside an orange box.

Action

= Action to be taken

A callout box with a grey arrow pointing to the word 'Information' inside a purple box.

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 <b>without</b> 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 <b>PD Provider Admin*</b> 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.

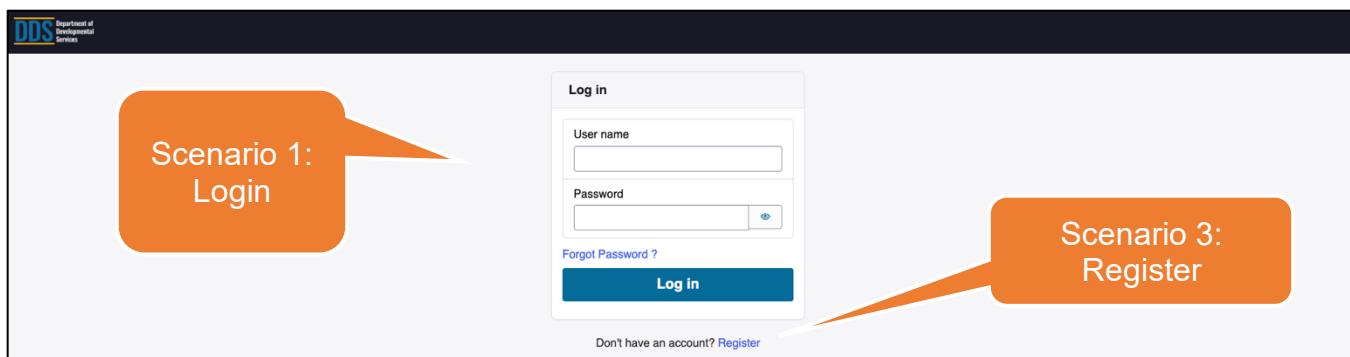
- a. You will be directed to the Vendor Self Registration form (Figure 1.1)
  - i. Enter your name, email and phone number.
  - ii. Review the Privacy Policy and Terms and Conditions and click the checkbox to agree.
  - iii. Click the “Sign Up” button at the bottom of the page.
- b. A confirmation message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



The image shows the 'Vendor Self Registration form' with several fields and buttons highlighted by orange callout boxes:

- A callout box labeled "Fill in all required fields" points to the "First name", "Last name", "Email", and "Phone Number" fields, which are marked with an asterisk (\*) indicating they are required.
- A callout box labeled "Click button" points to the "Phone Number" field.
- A callout box labeled "Click Sign Up" points to the "Sign Up" button at the bottom of the form.
- Other visible elements include a "Save as Draft" button, a "Privacy Policy and Terms and Conditions" checkbox, and a "Forgot Password?" link.

Figure 1.1: Vendor Self Registration Form



The image shows the 'Log in' page with two callout boxes:

- A callout box labeled "Scenario 1: Login" points to the "Log in" button.
- A callout box labeled "Scenario 3: Register" points to the "Register" link located below the "Forgot Password?" link.

Figure 1.2: Log in page

## 1:2 Set up a New Password

1. You will receive an email from [caddsprod@servicenowservices.com](mailto: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".

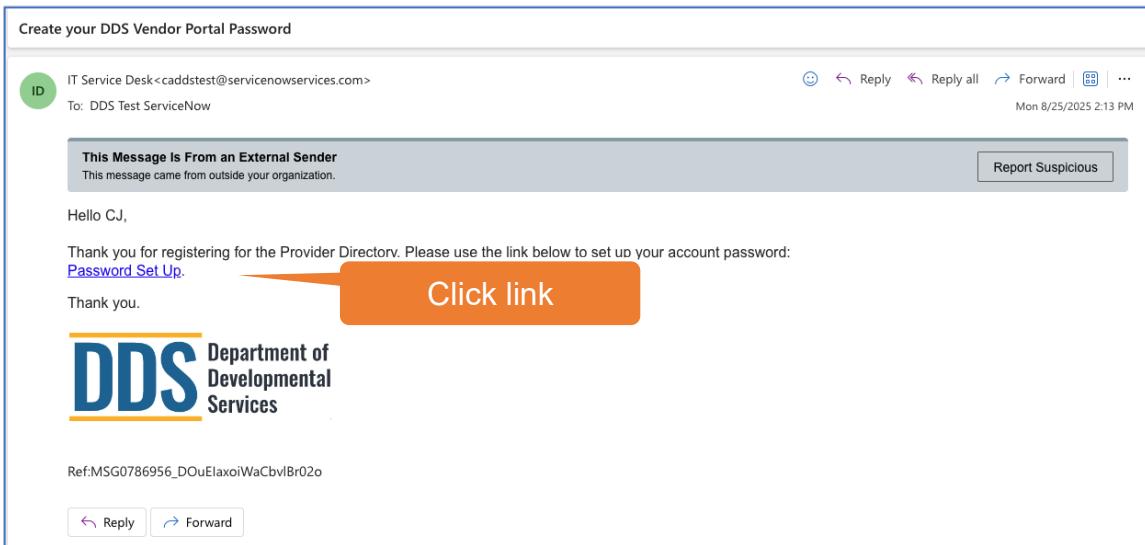


Figure 1.3: Registration Confirmation and Set Up Password Link Email

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.

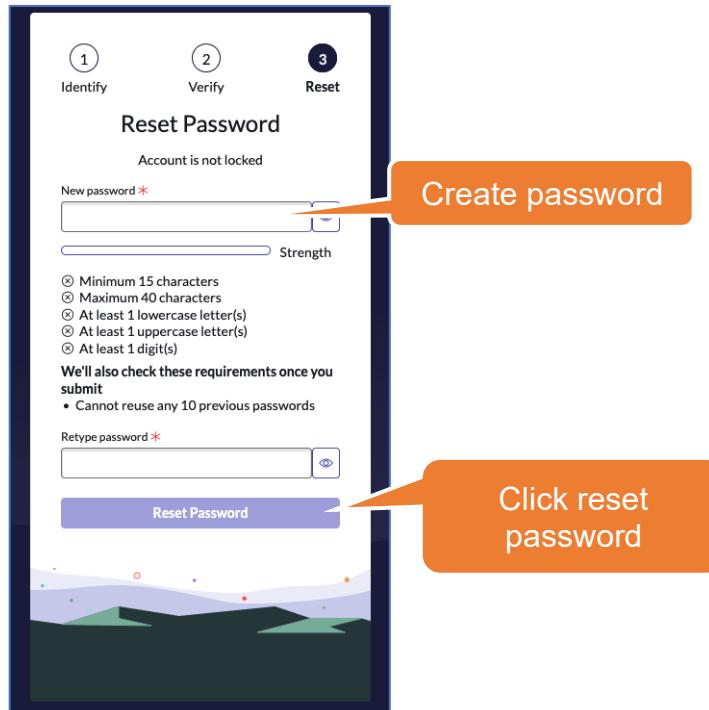


Figure 1.4: Reset Password Screen

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., john Doe@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".

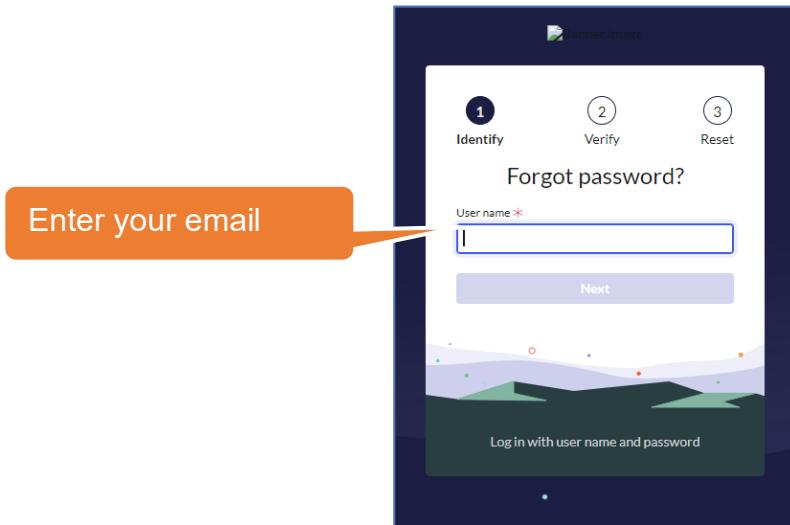


Figure 1.5: Forgot Password Screen

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.

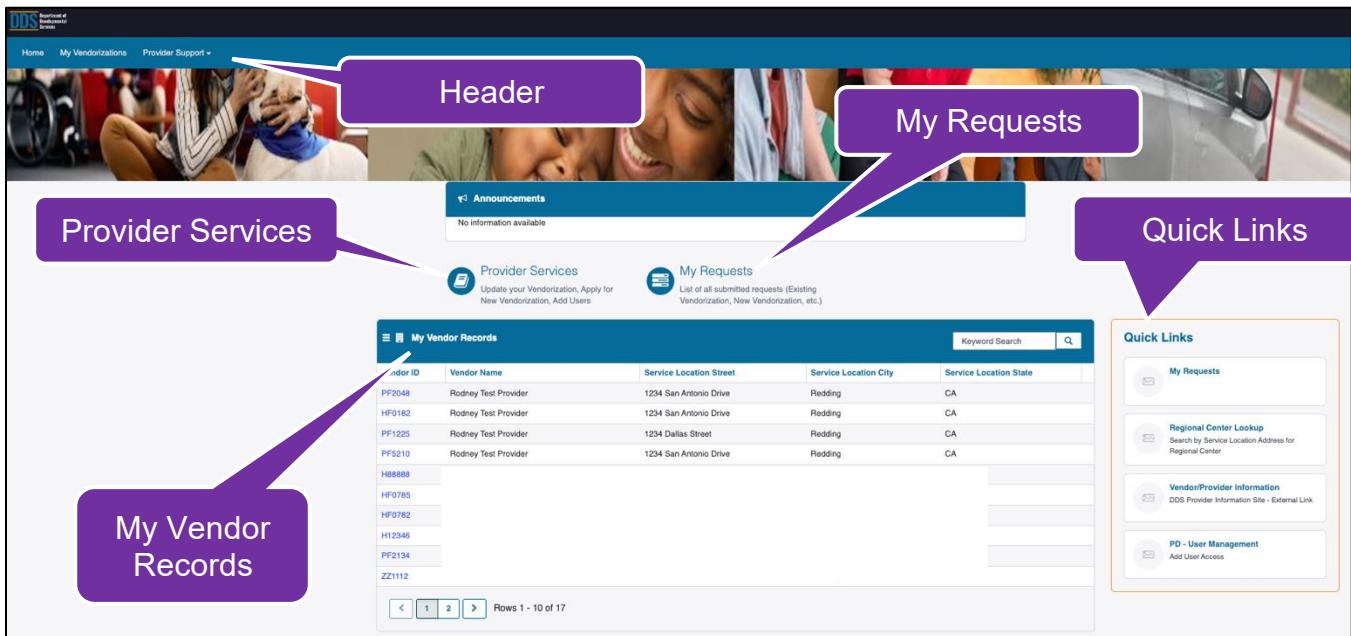


Figure 2.1: Provider Directory homepage

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).



My Vendor Records		Service Location Street			Service Location City		Service Location State	
Vendor ID	Vendor Name	Service Location Street			Service Location City		Service Location State	
H00323	Rodney Test Vendor	1234 San Antonio Dr			Redding		CA	
PF2048	Rodney Test Provider	1234 San Antonio Drive			Redding		CA	

Figure 3.1: My Vendor Records

**Rodney Test Provider**

Vendor ID H00323	Organization Type -	Parent Vendor Name Rodney Test Provider	Service Location Street 1234 San Antonio Dr
Service Location City Redding	Service Location State CA	Service Location Zip Code 96003	Service Location County -
Service Location Email Address rodney@test.com	Service Location Phone Number (555) 555-5555	Point of Contact Rodney Tester	RC Response -
Vendoring Regional Center Far Northern Regional Center	Request Status Not Started	Languages of Services Delivered -	

**≡ Service Codes**

Service Code	Service Code Description	User Regional Center	Approved	Vendoring Regional Center	E
851	Child Day Care		07-30-2025 11:01	Far Northern Regional Center	
010	Equestrian Therapy		11-03-2025 17:26	Far Northern Regional Center	

<
>
Rows 1 - 2 of 2

**Provider Directory**  
**Details**

- Provider Requests
- Provider Cases

**≡ All Submitted Records**

Number	Short description	Requesting Service Organization	Opened	Closed
NWVN0005623	Rodney Tester   Rodney Test Vendor   Rodney Test Vendor I Day Services	Rodney Test Provider	10-31-2025 07:57	11-03-2025 17:26
EXVN0001566	View or Update Vendor Record	Rodney Test Provider	10-15-2025 22:00	11-03-2025 17:00

<
>
Rows 1 - 2 of 2

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:

		<b>When applies</b>	<b>When applies</b>
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)

880-Transportation - Additional Component

**Service Code Relationship**

\* Service Code Description: 880-Transportation - Additional Component

\* Provider: Rodney Test Provider

**Compliance**

EVV Status: -- None --

HCBS Status: -- None --

CAP

Sanction

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 Name	Service Location Street	Service Location City	Service Location State	Case Number	Request Status
HB9765	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

Attachments

**Vendor Data**

**Attachments**

[Maria Rodriguez DRAFT DS1891.pdf](#) [Maria Rodriguez DRAFT DS1891.pdf](#) [Maria Rodriguez DRAFT DS1891.pdf](#)  
[\[DEMO USE ONLY\] New Agreement\\_signed.pdf](#) [Maria Rodriguez DRAFT DS1891.pdf](#) [Prof license.docx](#)  
[Maria Rodriguez DRAFT DS1891.pdf](#) [Lic.jpg](#) [Maria Rodriguez DRAFT DS1891.pdf](#) [\[DEMO USE ONLY\] New Agreement\\_signed.pdf](#)

**Vendor Information**

Vendor ID: COREY1

Tax ID / SSN: 123456789

\*Vendor Name: Maria Rodriguez

Service Location Email Address: test1@test.com

Parent Vendor Name: Rodriguez Speech Therapy

Point of Contact: Maria Rodriguez

Organization Type: Corporation

Service Location Phone Number: 123-456-7890

Vending Regional Center: San Diego Regional Center

Website: [www.website.com](#)

**Address Information**

Service Location Street: 123 Main St

Mailing Street: 123 Main St

Service Location City: El Centro

Mailing City: El Centro

Service Location State: California

Mailing State: California

Service Location County: Imperial County

Mailing County: Imperial County

Service Location Zip Code: 92243

Mailing Zip Code: 92243

**Additional Information**

Name of Governing Body: Rodriguez Speech Therapy

Applicant (Owner or Exec): Maria Rodriguez

Name Registered with Secretary of State: Rodriguez Speech Therapy

Preferred Name/DBA:

Consultant, Subcontractor & Community Resource Types to be Used by Vendor: N/A

NPI: N/A

License and Certification: Lic Prof lic

Facility Capacity: N/A

Click to update or submit

Update Vendorization
Submit with no changes

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
<b>Vendorization</b>	Attachments are automatically moved from the case to the vendor record, following the approval of the vendorization application.
<b>Change request</b>	Attachments are automatically moved from the case to the vendor record, following the approval of the change request.
<b>User vendorization</b>	Attachments are automatically moved from the case to the vendor record, following the close of the process.
<b>Regional center action</b>	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 statuses.

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)

View or Update Vendor Record

Existing Service Provider and need to update your information? Start here.

Submit a Case to Regional Center for updating Business Location information

\* Indicates required

Please choose the vendor record you would like to update

**Vendor Information**

Vendor Number	Parent Vendor Name
PF5210	Rodney Test Provider
Vendor Name	Vendoring Regional Center
Rodney Test Prov	Far Northern Regional Center
Comments	Service Codes
<input type="button" value="Un-editable field"/>	625-Counseling Services (Family Counselor, S)
Tax ID / SSN	* Change Tax ID / SSN
123456789	123456789
Organization Type	* Change Organization Type
Limited Liability Company (LLC)	Limited Liability Company (LLC)
Designated Point of Contact	* Change Point of Contact
Rodney Test	Rodney Test

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

10. Make edits and complete all required fields (\*). **If a required 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 with 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.

Case summary

Your request has been submitted

Major changes

Click

Rodney Tester  
11-18-2025 11:41 • Additional comments  
Field Name  
Original Value | New Value  
Change Organization Type  
| Non-Profit Organization (NPO)  
Change Service Location Street  
123 Main St | 1950 California St  
Change Service Location Zip  
96003 | 96001  
Change Name of Governing Body  
| Rodney Benavides Foundation  
Change Applicant (Owner or Executive)  
| Rodney Benavides  
Change Name Registered with Secretary of State  
| Rodney Tester  
Change License and Certification  
| Speech path  
Change Facility Capacity  
| 12

Number EXVN0001  
817  
State Open  
Priority 4 - Low  
Created 1m ago  
Updated 1m ago  
Options

Attachments  
Test document.docx (12.8 KB)  
4m ago

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, your 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
<b>Not started</b>	<ul style="list-style-type: none"><li>• Awaiting service provider review and submission</li></ul>	Yes
<b>Approved</b>	<ul style="list-style-type: none"><li>• Service provider submitted "submit with no changes"</li><li>• Service provider submitted <u>only</u> minor or insignificant change(s) and system approved request automatically</li><li>• Service provider submitted major change(s) and regional center approved request</li></ul>	Yes
<b>Pending approval</b>	<ul style="list-style-type: none"><li>• Service provider submitted major change(s) and is awaiting regional center review and approval or rejection decision</li></ul>	No - Locked until decision
<b>Rejected - Resubmit</b>	<ul style="list-style-type: none"><li>• Service provider submitted major change(s) and regional center rejected it and requested corrections with resubmission</li></ul>	Yes
<b>Rejected - Closed</b>	<ul style="list-style-type: none"><li>• Service provider submitted major change(s) and regional center rejected it and asked for service provider to contact the regional center</li></ul>	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)

The screenshot shows the Provider Services interface. At the top, there is an 'Announcements' section with a message: 'No information available'. Below it is a 'Provider Services' section with a link to 'Update your Vendorization, Apply for New Vendorization, Add Users'. To the right is the 'My Requests' section, which includes a 'List of all submitted requests (Existing Vendorization, New Vendorization, etc.)' and a 'Keyword Search' bar. Below this is a table titled 'My Vendor Records' with columns for Vendor ID, Vendor Name, Service Location, and Service Location State. The table contains 17 rows of data. At the bottom of the table are navigation buttons for 'Rows 1 - 10 of 17'. To the right of the table is a 'Quick Links' sidebar with four items: 'My Requests', 'Regional Center Lookup', 'Vendor/Provider Information', and 'PD - User Management'. Two orange arrows point to the 'My Requests' link in the header and the 'Click' button on the 'My Requests' page.

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.

My requests				
Request	Opened	Stage	State	Updated
<a href="#">NWVN0005046</a> Lucy's Daycare Lucy's Daycare   Lucy's Daycare   Lucy's Daycare   Residential Services New Vendorization New Service or New Location Alta California Regional Center	10-13-2025 15:22	Requirements	New	⌚ 3d ago
<a href="#">EXVN0001445</a> View or Update Vendor Record Update Vendorization Major Change Far Northern Regional Center	03-07-2025 12:05	Review	Open	⌚ 5mo ago
<a href="#">NWVN0001036</a> New Vendorization Standard	04-24-2025 08:58		Draft	⌚ 6mo ago

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.

Number  
EXVN0001729

Created  
20m ago

Updated  
20m ago

State  
Open

**View or Update Vendor Record**

Priority  
4 - Low

Requesting Service Org...  
Rodney Test Prov...

**Activity** **Attachments**

Add attachments

Add comments

Activity Stream

Click to apply

Send

**Rodney Tester**

Field Name  
Original Value | New Value

Change Mailing Street  
I 1234 San Antonio Drive

Change Mailing State  
I CA

Change Mailing City  
I Redding

Change Mailing Zip Code  
I 96003

Change Mailing County  
I Shasta

Major Change Submitted

20m ago • Additional comments

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.

The screenshot shows a web-based case management system. At the top, a purple bar contains the text 'Short description'. Below it, a purple box labeled 'Case ID' contains the number 'NWVN0005046'. To the right, a status bar shows 'Created 7d ago', 'Updated 7d ago', and 'State New'. A blue header bar displays the text 'Lucy's Daycare | Lucy's Daycare | Lucy's Daycare | Residential Services' and an 'Action' button. Below the header, a purple box labeled 'Stage' contains 'Select Vendoring Region...' and 'Alta California Requirements'. A purple box labeled 'State' shows the status as 'New'. At the bottom, a purple box labeled 'Case Details' contains a text input field 'Type your message here...', a 'Post' button, and a paperclip icon. The 'Activity' tab is selected. The 'Activity Stream' section shows three entries from 'Rodney Tester': 1. 'Attachment made.' (7d ago). 2. 'Test document for DDS Training Video demo.docx 13.0 KB' (7d ago). 3. 'NWVN0005046 Created' (7d ago). A green circle with 'Start' is at the bottom left of the stream. A purple box labeled 'Activity Stream' points to the bottom of the stream area.

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	<ul style="list-style-type: none"> <li>The application has been processed, and a decision was rendered</li> <li>The case was closed by the applicant</li> <li>The case was closed by the regional center</li> </ul>

3. **Stage** – See Figure 5.1 for an overview of the stages.

4. **Case details** - Three tabs at the top of the page:

- Activity (a.k.a., Activity Stream) – This tab includes a vertical, visual tracker of activities, messages and attachments.
- Attachments – This tab lists documents uploaded by you or the regional center.
- 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.

**Rodney Tester**

Vendor ID H98765	Organization Type Limited Liability Company (LLC)	Parent Vendor Name Rodney Test Provider	Service Location Street 13683 Antonio Dr
Service Location Zip Code 96003	Service Location Email Address rodeny@test.com	Service Location City Redding	Service Location State CA
RC Response Approved with no modifications	Service Location Phone Number 555-555-5555	Request Status Approved	Point of Contact Rodney Tester
Vendoring Regional Center Far Northern Regional Center			

**Service Codes**

Service Code	Service Code Description	User Regional Center	Approved	Vendoring Regional Center
006	Foster Grandparent Program		10-27-2025 10:12	Far Northern Regional Center
068	Therapeutic Play Program	Far Northern Regional Center	10-23-2025 18:59	Far Northern Regional Center

Rows 1 - 2 of 2

**RITM cases**

i **Provider Directory**  
Details

e **Provider Requests**

c **Provider Cases**

s **All Submitted Records**

s **Keyword Search**

s

Number	Short description	Requesting Service Organization	Opened	Closed
NWVN0005188	Rodney Tester   Rodney Test Vendor   Rodney Test Vendor   Other Services	Rodney Tester	10-23-2025 16:59	10-23-2025 18:59
NWVN0005215	I Rodney Tester   Rodney Tester   Rodney Tester	Rodney Tester	10-27-2025 10:06	10-27-2025 10:12
EXVN0001693	View or Update Vendor Record	Rodney Tester	11-05-2025 08:27	11-05-2025 08:54
EXVN0001692	View or Update Vendor Record	Rodney Tester	11-05-2025 07:49	11-05-2025 07:59

Rows 1 - 4 of 4

**EXVN and  
NWVN cases**

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.

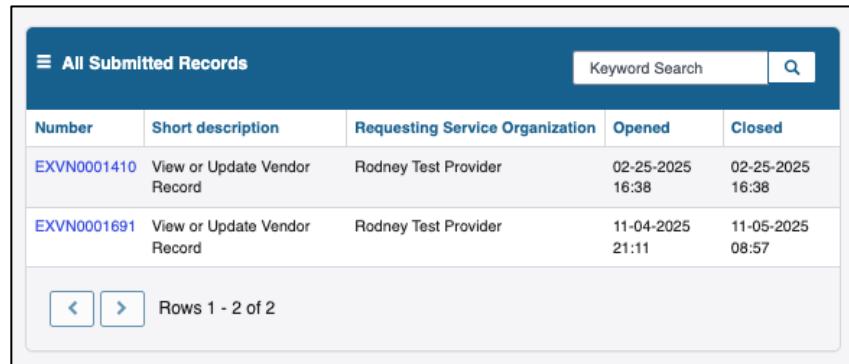


My Vendorizations						Keyword Search
Vendor ID	Vendor Name	Service Location Street	Service Location City	Service Location State	Case Number	Request Status
PF2048	Rodney Test Provider	1234 San Antonio Drive	Redding	CA	EXVN0001681	Rejected - Resubmit
HF182	Rodney Test Provider	1234 San Antonio Drive	Redding	CA		Rejected - Resubmit
PF1225	Rodney Test Provider	1234 Dallas Street	Redding	CA	EXVN0001444	Rejected - Resubmit
PF6210	Rodney Test Provider	1234 San Antonio Drive	Redding	CA	EXVN0001729	Pending Approval
H88888	Moly Smith	4108 57th St	Sacramento	California	EXVN0001751	Pending Approval
HF0795	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

Number  
EXVN0001822

Created 6m ago Updated 1m ago State Closed

### View or Update Vendor Record

Priority 4 - Low Requesting Service Org... Rodney Test Prov...

Activity Attachments

**Tammy Trialuser** Reject comment 1m ago • Additional comments

Approval Comments:  
This address is the city's chamber of commerce address. Please resubmit and attach proof that this is your business address.

**Tammy Trialuser** 3m ago • Additional comments

This address is the city's chamber of commerce address. Please provide paperwork that proves this is your business address.

**Rodney Tester** 8m ago • Additional comments

Field Name  
Original Value | New Value  
Change Organization Type  
| Sole Proprietor  
Change Service Location Street  
1234 San Antonio Drive | 1321 Butte Street Suite 100  
Change Service Location Zip  
96003 | 96001  
Change Name of Governing Body  
| n/a  
Change Applicant (Owner or Executive)  
| n/a  
Change Name Registered with Secretary of State  
| Rodney Test Provider

**Change Request**

The screenshot shows a vendor record update interface. At the top, it displays the vendor number (EXVN0001822), creation and update times (6m ago, 1m ago), and a 'Closed' status. Below this is a header 'View or Update Vendor Record' with sub-sections for 'Priority' (4 - Low) and 'Requesting Service Org...' (Rodney Test Prov...). A navigation bar at the bottom includes 'Activity' and 'Attachments'. The main content area shows a comment from 'Tammy Trialuser' rejecting a comment, followed by another from 'Tammy Trialuser' with a similar message. Below these, a large orange box highlights a list of changes for 'Rodney Tester', including address updates, organization type, service location, zip code, governing body, applicant, and name registered with the state. An orange speech bubble labeled 'Change Request' points to this list of changes.

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).

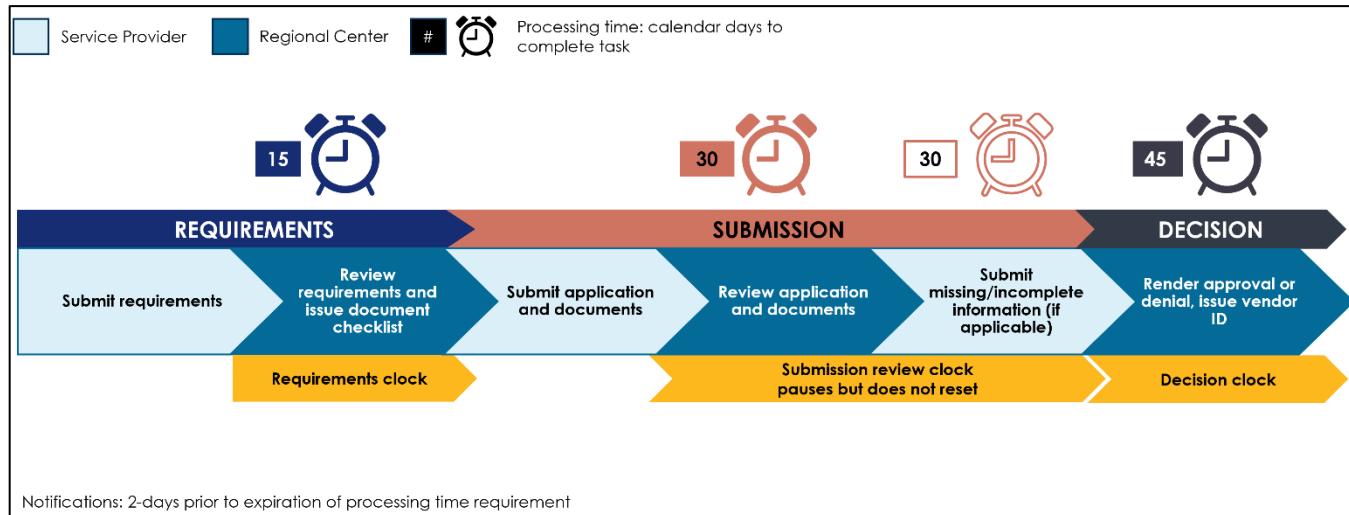


Figure 5.1: Vendorization Process & Response Time Requirements



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)

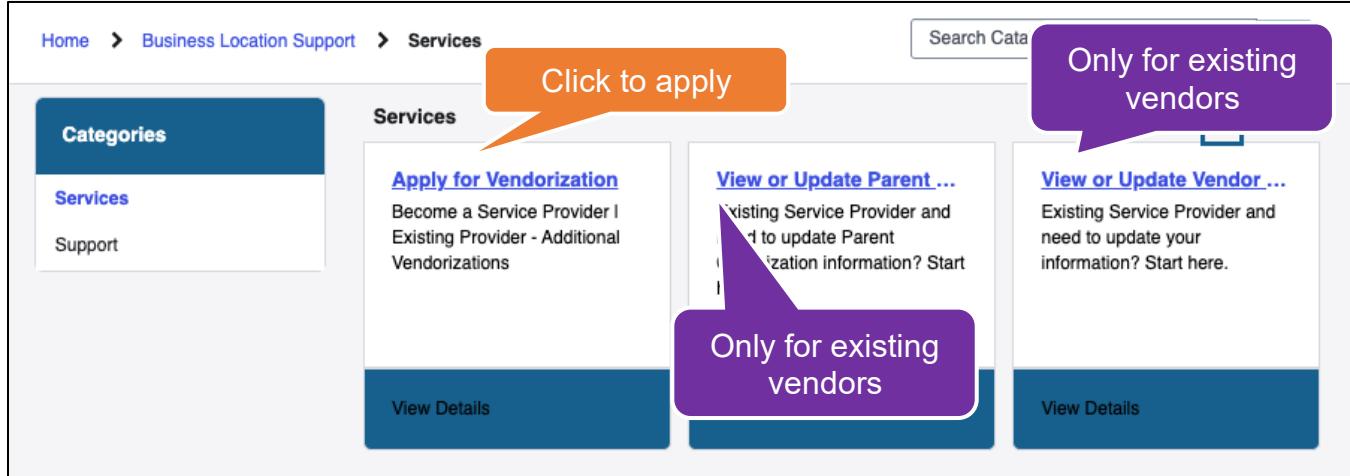


Figure 5.2: Provider Services

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.”

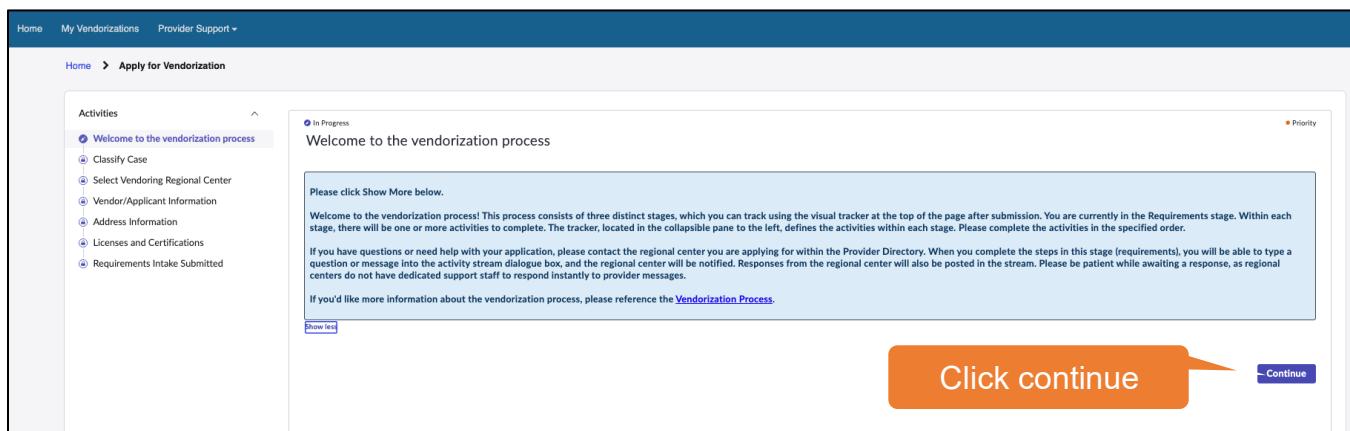


Figure 5.3: Welcome - New



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 <b>same</b> 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.

Home > Apply for Vendorization

**Activities**

- >Welcome to the vendorization process
- Classify Case
- Select Vendoring Regional Center
- Vendor/Applicant Information
- Address Information
- Licenses and Certifications
- Requirements Intake Submitted

**In Progress**

### Welcome to the vendorization process

Please click Show More below.

Welcome to the vendorization process! This process consists of three distinct stages, which you can track using the visual tracker at the top of the page after submission. You are currently in the Requirements stage. Within each stage, there will be one or more activities to complete. The tracker, located in the collapsible pane to the left, defines the activities within each stage. Please complete the activities in the specified order.

If you have questions or need help with your application, please contact the regional center you are applying for within the Provider Directory. When you complete the steps in this stage (requirements), you will be able to type a question or message into the activity stream dialogue box, and the regional center will be notified. Responses from the regional center will also be posted in the stream. Please be patient while awaiting a response, as regional centers do not have dedicated support staff to respond instantly to provider messages.

If you'd like more information about the vendorization process, please reference the [Vendorization Process](#).

Show less

What type of vendorization are you requesting? \*

-- None --

✓ -- None --

New service

New location, same catchment area

New location, different catchment area

**Click continue**

Continue

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.”

Home > Apply for Vendorization

**Activities**

- >Welcome to the vendorization process
- Classify Case
- Select Vendoring Regional Center
- Vendor/Applicant Information
- Address Information
- Licenses and Certifications
- Requirements Intake Submitted

**In Progress**

### Welcome to the vendorization process

Please click Show More below.

Welcome to the vendorization process! This process consists of three distinct stages, which you can track using the visual tracker at the top of the page after submission. You are currently in the Requirements stage. Within each stage, there will be one or more activities to complete. The tracker, located in the collapsible pane to the left, defines the activities within each stage. Please complete the activities in the specified order.

If you have questions or need help with your application, please contact the regional center you are applying for within the Provider Directory. When you complete the steps in this stage (requirements), you will be able to type a question or message into the activity stream dialogue box, and the regional center will be notified. Responses from the regional center will also be posted in the stream. Please be patient while awaiting a response, as regional centers do not have dedicated support staff to respond instantly to provider messages.

If you'd like more information about the vendorization process, please reference the [Vendorization Process](#).

Show less

What type of vendorization are you requesting? \*

New service

If you would you like to pre-fill your data from an existing vendorization

**Click magnifying glass**

**Click continue**

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, your 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."

Home > Apply for Vendorization

Activities

- Welcome to the vendorization process
- Select Vendoring Regional Center**
- Vendor/Applicant Information
- Address Information
- Licenses and Certifications
- Requirements Intake Submitted

In Progress

Select Vendoring Regional Center

Regional Center Lookup Tool

To find your vendoring regional center, enter your primary office or operating location address in the Regional Center Lookup tool.

California has 21 regional centers with more than 40 offices located throughout the state. Both geographic accessibility and population density were considered when selecting locations for the 21 regional centers. The catchment area boundaries for the regional centers conform to county boundaries or groups of counties, except in Los Angeles County, which is by health districts and not by county.

Service Street  
1234 San Antonio Dr

Service City  
Redding

Service State  
CA

Service Zip  
96003

Select Vendoring Regional Center  
Far Northern Regional Center

Mark Complete   Update   Verify Regional Center

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.”

The screenshot shows a web-based application for vendor application. On the left, a sidebar lists 'Activities' with several steps: 'Welcome to the vendorization process', 'Select Vendoring Regional Center', 'Vendor/Applicant Information' (which is currently selected and highlighted in blue), 'Address Information', 'Licenses and Certifications', and 'Requirements Intake Submitted'. The main content area is titled 'Apply for Vendorization'. It contains several input fields and dropdown menus:

- Name registered with California Secretary of State, if any: 'Rodney Test Provider'
- Telephone Number: '555-555-5555'
- Website: (empty field)
- Ensure to enter http:// or https:// or www. for a fully validated URL: (empty field)
- Entity Type: A dropdown menu showing 'Non-Profit Organization (NPO)' is selected.
- Federal Tax ID or Social Security Number (SSN): '123456789'
- Federal Employer Identification Number (EIN) and/or Social Security Number (SSN), if any: (empty field)
- National Provider Identifier (NPI), if any: 'N/A'
- Type of Service to be Provided: (empty field)
- Describe in detail the service(s) you would like to provide: (empty field)
- Category of Service: A dropdown menu showing '-- None --' is selected.

At the bottom right of the form, there are two buttons: 'Mark Complete' (highlighted in orange) and 'Update'.

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 different than service address, enter mailing street, city, state, zip and county.
    - ii. If mailing address is the same 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.

Make selection

Click verify address

Use improved Service Address format?

New format found:  
1830 9th St Sacramento California 95811 Sacramento County

Old address:  
1830 9th St Sacramento CA 95811 unknown

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”.

Activities

- Welcome to the vendorization process
- Select Vending Regional Center
- Vendor/Applicant Information
- Address Information
- Licenses and Certifications**
- Requirements Intake Submitted

In Progress

### Licenses and Certifications

Next, the vending regional center will review your submission. You will be notified whether you meet the minimum requirements for the service you are applying for. The vendorization process will review your submission and submit all necessary documents to verify that you meet all of the requirements and standards specified in regulations. Once you click "Mark Complete" you will proceed to the next stage - Submission - where you will fill out additional information and submit your application.

Have you registered or obtained necessary licenses with the State of California?

Please list licenses/registrations and their IDs provided by the state:

CA state Bar license

Do you hold professional licenses or certifications?

Attachments [+ Add file](#)

CA state bar license.docx 12.8 KB

Click when applicable

Click mark complete

Mark Complete Update

Figure 5.9: Licenses and Certifications

Home > Apply for Vendorization

Activities

- Welcome to the vendorization process
- Select Vending Regional Center
- Vendor/Applicant Information
- Address Information
- Licenses and Certifications**
- Requirements Intake Submitted

In Progress

### Licenses and Certifications

Next, the vending regional center will review your submission. You will be notified whether you meet the minimum requirements for the service you are applying for. The vendorization process will review your submission and submit all necessary documents to verify that you meet all of the requirements and standards specified in regulations. Once you click "Mark Complete" you will proceed to the next stage - Submission - where you will fill out additional information and submit your application.

Have you registered or obtained necessary licenses with the State of California?

Please list licenses/registrations and their IDs provided by the state:

CA state Bar license

Attachments [+ Add file](#)

[Optional] Rename file

Upload a file

Title: test document.docx

Cancel Upload

Click upload

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 vending 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.

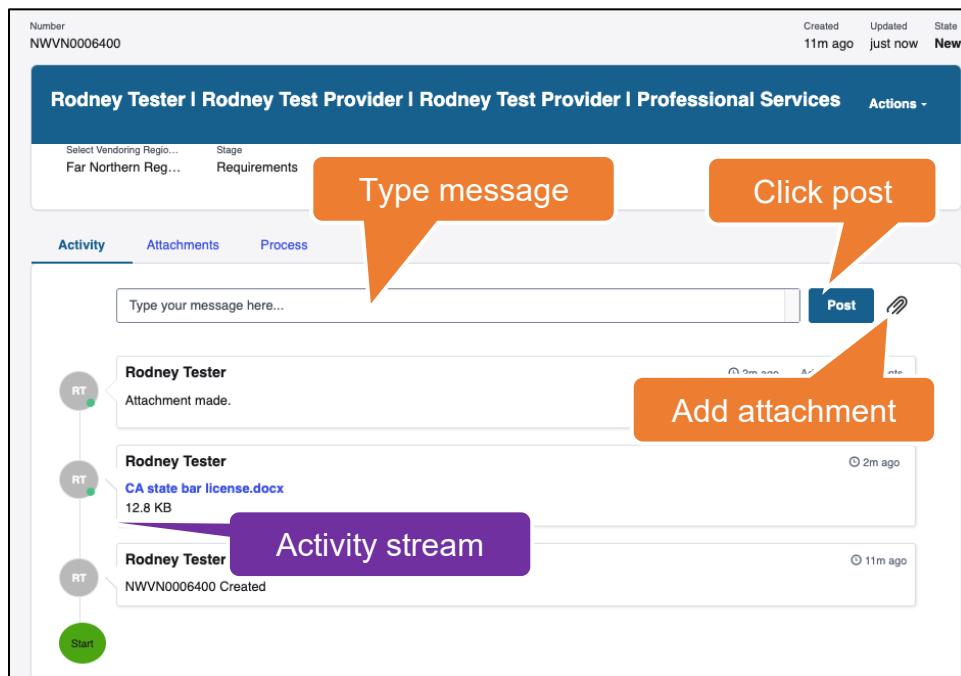


Figure 5.11: Case Summary

## 5:2 Submission Stage

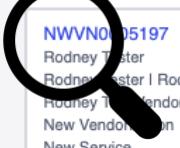
If you met Requirements eligibility you will receive an email from the vendoring regional center informing you of their decision. Your case will progress to the Submission stage.



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.



Request	Opened	Stage	State	Updated
<a href="#">NWWN0005197</a> Rodney Tester Rodney Tester I Rodney Test Vendor I Rodney Test Vendor I New Vendoration New Service Far Northern Regional Center	10-24-2025 13:18	Submission	Awaiting Info	⌚ 15m ago
<a href="#">NWWN0005198</a> Hulk Hogan Hulk Hogan I BRAVO PROGRAM I BRAVO PROGRAM I Personal Supports and Training Services New Vendoration New Service Far Northern Regional Center	10-23-2025 13:01	Requirements	New	⌚ 4d ago
<a href="#">NWWN0005161</a> Corey trying to replicate Lucy's Daycare	10-21-2025 08:30	Submission	Awaiting Info	⌚ 7d ago

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.”

Home > My Request - NWVN0001845

Number NWVN0001845

Created 17m ago Updated 5m ago State Awaiting Info

**Speak to me !!! Personal Supports and Training Services**

Select Vending Regio... Stage Far Northern Reg... Submission

**Process tab**

Activity Attachments **Process**

✓ Requirements > **Submission** > **Decision**

**Submission stage**

Activities

- Submission Stage
- Additional Information**
- Generate Draft PDF
- Vendorization Checklist
- Packet Review

**Additional Information**

In Progress

NW Assigned to Noelle Ward

Facility Capacity 0

Consultant, Subcontractor & Community Resource Types to be Used by Vendor 0

Date of Birth (DOB) 1945-10-30

Languages of Services Delivered American Sign Language

**Click mark complete**

Mark Complete Update

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.

Activity    Attachments    **Process**

Case details

Requirements    Submission    Decision

Activities

- Submission Stage
- Additional Information
- Generate Draft PDF
- Vendorization Checklist**

**Click after attached**

**Select "Yes"**

**Click +Add file**

**Click mark complete**

**In Progress**    **Priority**

**Vendorization Checklist**

Assigned to Belinda Vang

Please review the checklist below & upload all necessary documents. Once completed, you will need to change the "Packet Complete" dropdown to "Yes" confirming: I have uploaded and signed all documents required to be evaluated for the service I am applying for. I understand that my application will not be reviewed until all required materials are submitted, and that missing or incomplete documents may delay or prevent my vendorization.

Vendor Application (Form DS 1890) (System Generated & E-signed)  
 Applicant/Vendor Disclosure Statement (Form DS 1891) (System Generated & E-signed)  
 Vendor Agreement

Vendorization Packet Complete \*

None --

Attachments [+ Add file](#)

Donna Moss DRAFT DS18... 62.2 KB

Donna Moss DR DS18... 85.6 KB

**Mark Complete**    **Update**

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.

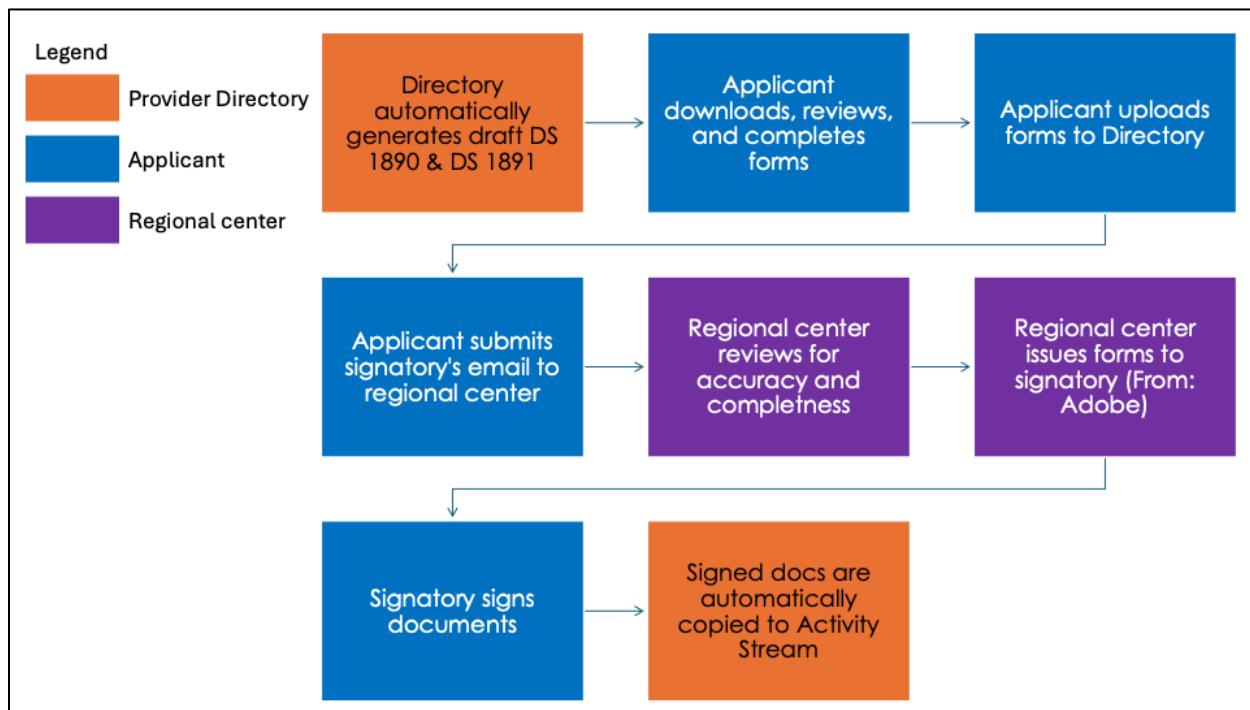


Figure 5.15: E-sign Process

### 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.

Home > My Request - NWVN0005623

Number: NWVN0005623

Created: 7h ago Updated: 5m ago State: Awaiting Info

**Rodney Tester | Rodney Test Vendor | Rodney Test Vendor | Day Services**

Select Vendoring Regio... Stage: Submission

Far Northern Reg...

Activity   **Attachments**   Process

Attachments tab

Click to add

Rodney Tester DRAFT DS1890.pdf (62.3 KB)

Rodney Tester DRAFT DS1891.pdf (85.5 KB)

Test document.docx (12.8 KB)

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

Name of Governing Body or Management Organization: Rodney Test Vendor

Mailing Address: 2323 Churn Creek Rd Redding California 96002

Service Address: 13663 Antonio Dr Redding California 96003

Type of Service to be Provided: Day Services

**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: ►

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.

<b>PLEASE FILL OUT</b>			<b>Save Form</b>	<b>Reset Form</b>
<b>Part 1. Applicant/Vendor Information</b>				
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 best describes the structure of the applicant or vendor individual, business entity, agency, facility or organization: Check <b>SSN</b> or <b>EIN</b>				
<input type="radio"/> Parent or Consumer for <b>SSN</b> <input type="radio"/> Sole Proprietor for <b>EIN</b> <b>or</b> <input type="radio"/> Business Entity for <b>EIN</b> 1 above and Part 3 on page 3, then proceed to <b>Applicant/Vendor Signature</b> on page 4 to sign and date).				
<input checked="" type="radio"/> Sole Proprietor (Unincorporated)				
<input type="radio"/> General Partnership <input type="radio"/> Limited Partnership <input type="radio"/> Limited Liability Partnership				
<input type="radio"/> Limited Liability Company: State of formation: _____				
<input type="radio"/> Governmental				
<input type="radio"/> Corporation: Corporate number: _____ State incorporated: _____				
<input type="radio"/> Nonprofit – Check One: <input type="radio"/> Unincorporated Association <input type="radio"/> Religious/Charitable				
<input type="radio"/> Corporation <input type="radio"/> 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

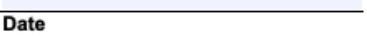
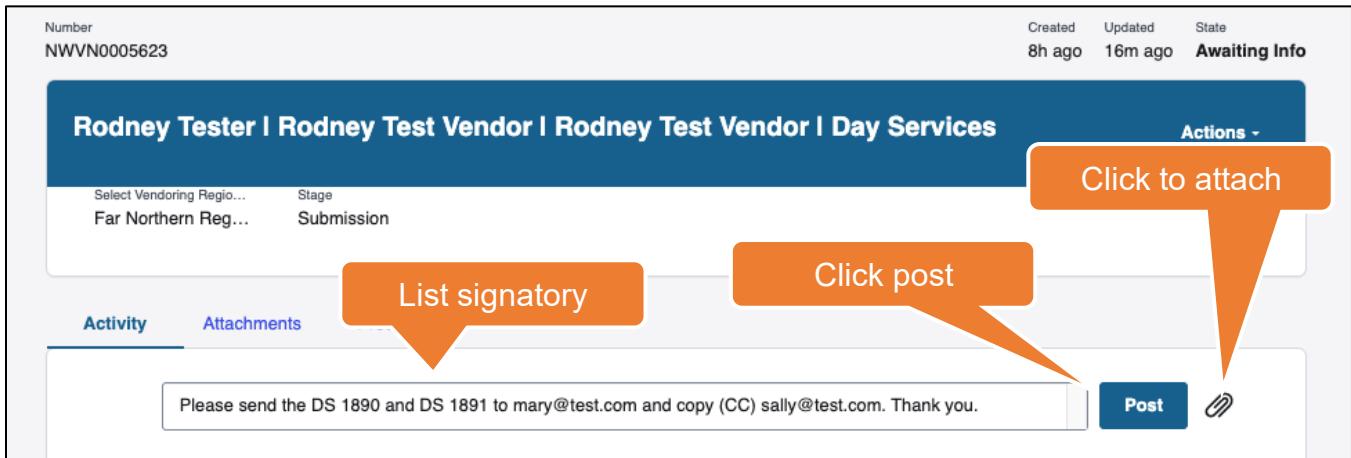
State of California—Health and Human Services Agency DS 1891 (7/2011)		Department of Developmental Services
<b><u>APPLICANT/VENDOR SIGNATURE</u></b>		
<p>Knowingly and willfully failing to fully and accurately disclose the information requested may result in denial of a request to become vendorized, or if the service provider already is vendorized, a termination of its vendorization.</p> <p>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 vendorizing Regional Center, in writing, within 30 days of any changes or if additional information becomes available.</p>		
<b>Name of Applicant/Vendor or Authorized Representative</b>		<b>Title</b> 
<b>Signature</b>		<b>Date</b> 

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 vendorizing 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 vendorizing 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.



Number  
NWVN0005623

Created 8h ago   Updated 16m ago   State Awaiting Info

**Rodney Tester | Rodney Test Vendor | Rodney Test Vendor | Day Services**

Select Vendoring Regio...   Stage  
Far Northern Reg...   Submission

Activity   Attachments

Please send the DS 1890 and DS 1891 to mary@test.com and copy (CC) sally@test.com. Thank you.

Click to attach

List signatory

Click post

Post

Figure 5.21: Activity: Signatory

Note: Your vendorization checklist is not complete until the vendorizing 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](mailto: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](mailto: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.

The screenshot shows a process tab for a vendor application. At the top, the navigation bar includes 'Home' and 'My Request - NWVN0005046'. Below the navigation, the request number 'NWVN0005046' is displayed along with 'Created 10d ago', 'Updated 17m ago', and 'State Open'. The main title of the process is 'Lucy's Daycare | Lucy's Daycare | Lucy's Daycare | Residential Services'. A purple callout bubble points to the word 'Stage' in the navigation bar. The navigation bar also includes 'Activity', 'Attachments', and 'Process'. Below the navigation, a progress bar shows 'Requirements' (green), 'Submission' (green), and 'Decision' (blue, highlighted). The 'Decision' stage is currently active. On the left, an 'Activities' sidebar lists 'Decision Stage' and 'Vendor Issuance Approval' (both marked with a blue circle). The main content area displays a table titled 'Vendor Issuance Approval' with the status 'In Progress'. It shows an assignment to 'Belinda' and a note: 'Approval for this request has been requested 3'. The table has columns for 'State', 'Name', 'Comments', and 'Created'. Three rows are listed, all marked as 'Requested' with a creation date of '10-22-2025 15:30'.

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.

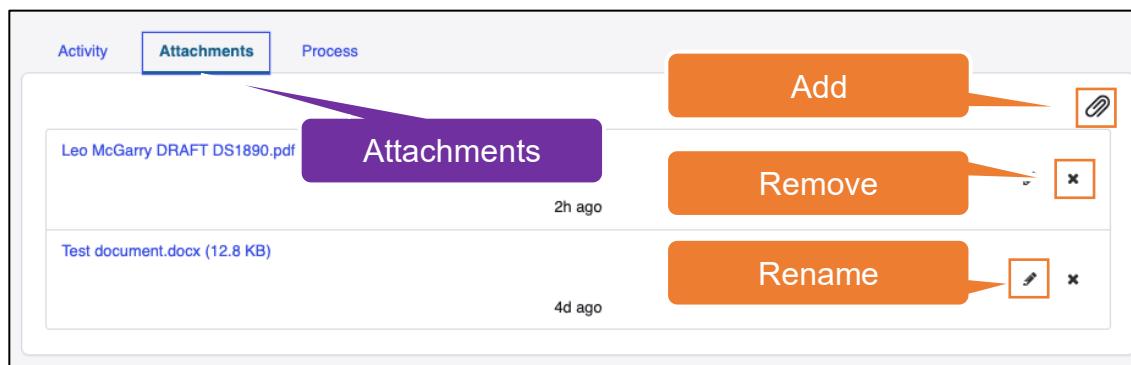


Figure 5.23: Attachments Tab: Add, Remove, Rename

## 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.

My requests				
Request	Opened	Stage	State	Updated
<a href="#">NWVN0005179</a> underlined New Vendorization New Service or New Location Far Northern Regional Center	10-23-2025 13:01	Profile	Draft	3h ago

Figure 5.24: My Requests: Draft Status

Activity	Attachments	Process
		<a href="#">Requirements</a>
<b>Activities</b>		
^		
<input checked="" type="checkbox"/> Welcome to the vendorization process		
<input checked="" type="checkbox"/> New Location or Service		
<input checked="" type="checkbox"/> Classify Case		
<input checked="" type="checkbox"/> Select Vendoring Regional Center		
<input checked="" type="checkbox"/> Vendor/Applicant Information		
<input type="checkbox"/> Address Information		
<input type="checkbox"/> Licenses and Certifications		
<input type="checkbox"/> Requirements Intake Submitted		

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](mailto: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.

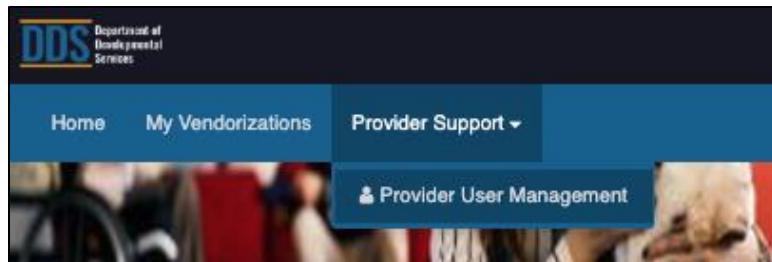


Figure 6.1: Provider User Management

### 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.

**PD - User Management**

Add User Access

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

My Vendor Organization

Rodney Test Provider

PD Group Membership

Access Role Group	Current Members	Maximum Members
PD Provider Admin	2	2
PD Read Only	0	10
PD Change Requestors	0	15

**Add**

**Add** **Remove All**

Actions	Add, Keep, or Remove?	User ID	First name	Last name	Access Role Group	Orgar
	Keep Access	Rodney Tester	Rodney	Tester	PD Provider Admin	
	Keep Access	Josh Lyman	Josh	Lyman	PD Provider Admin	

**Remove**

Add attachments

Submit

Click

Remove

Figure 6.2: PD - User Management

**Add Row**

Add, Keep, or Remove?

Add Access

User ID

User Acc

er Acc

is fo

er Adm

or Or

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up Me

cess F

Provic

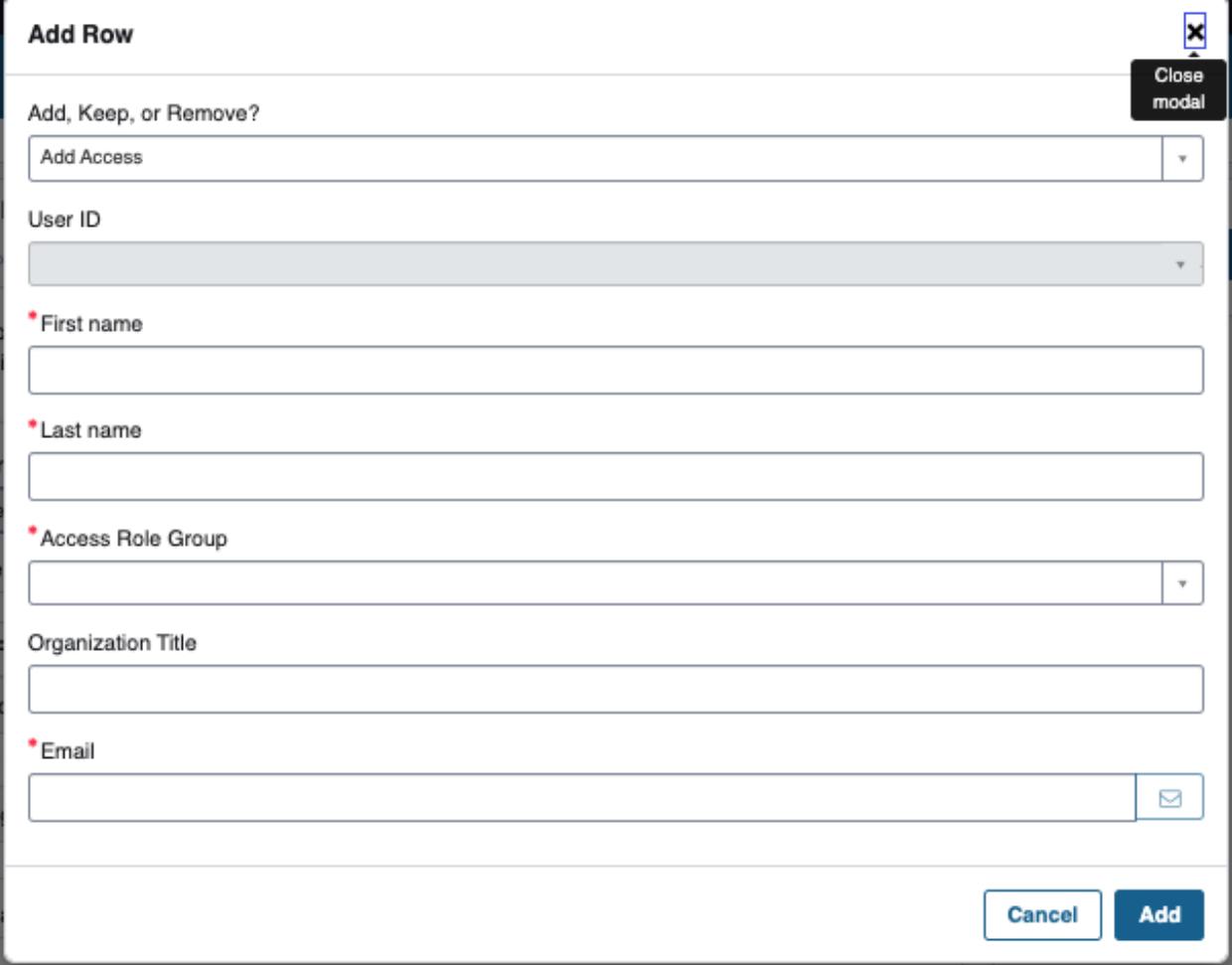
Read

Chanc

er Man

Cancel

Add



This modal window is titled 'Add Row' and contains a question 'Add, Keep, or Remove?'. Below the question is a dropdown menu labeled 'Add Access'. The main body of the modal is a form for adding a user, with fields for 'User ID' (a dropdown menu), 'First name' (text input), 'Last name' (text input), 'Access Role Group' (dropdown menu), 'Organization Title' (text input), 'Email' (text input with an envelope icon), and 'Phone' (text input). At the bottom are 'Cancel' and 'Add' buttons.

Figure 6.3: PD User Management – Add User

Are you sure you want to delete the row?

Close modal

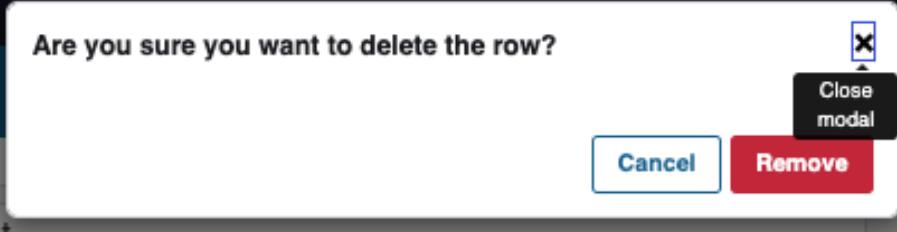
Cancel

Remove

PD - User Management

Add User Access

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



This modal window is titled 'Are you sure you want to delete the row?'. It contains 'Cancel' and 'Remove' buttons. The background of the main window shows the 'PD - User Management' title and an 'Add User Access' section. A descriptive text at the bottom states: 'This form is for Provider Directory user administration by the provider administrator to delegate access. A Provider Administrator can 'Add' access for their organizational contacts.'

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.

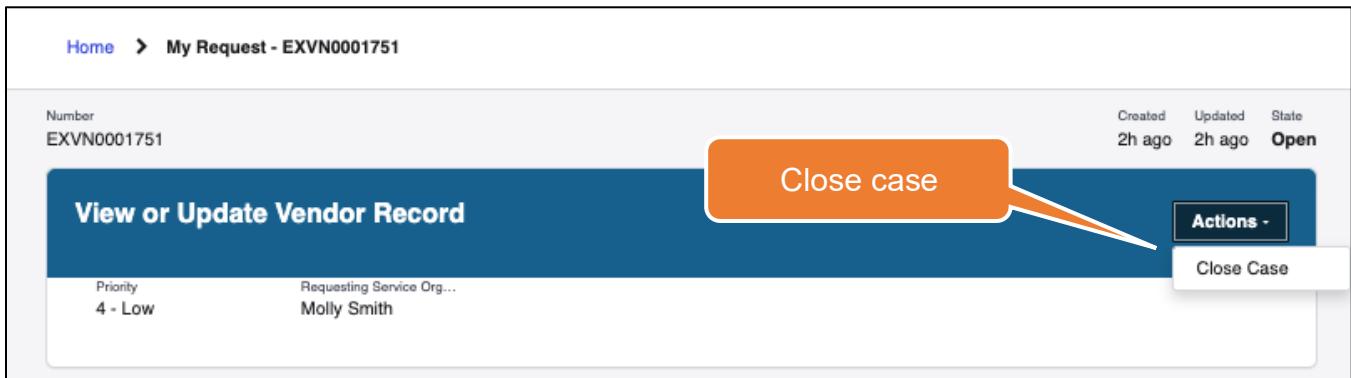


Figure 7.1: View of Update Vendor Record – Close Case

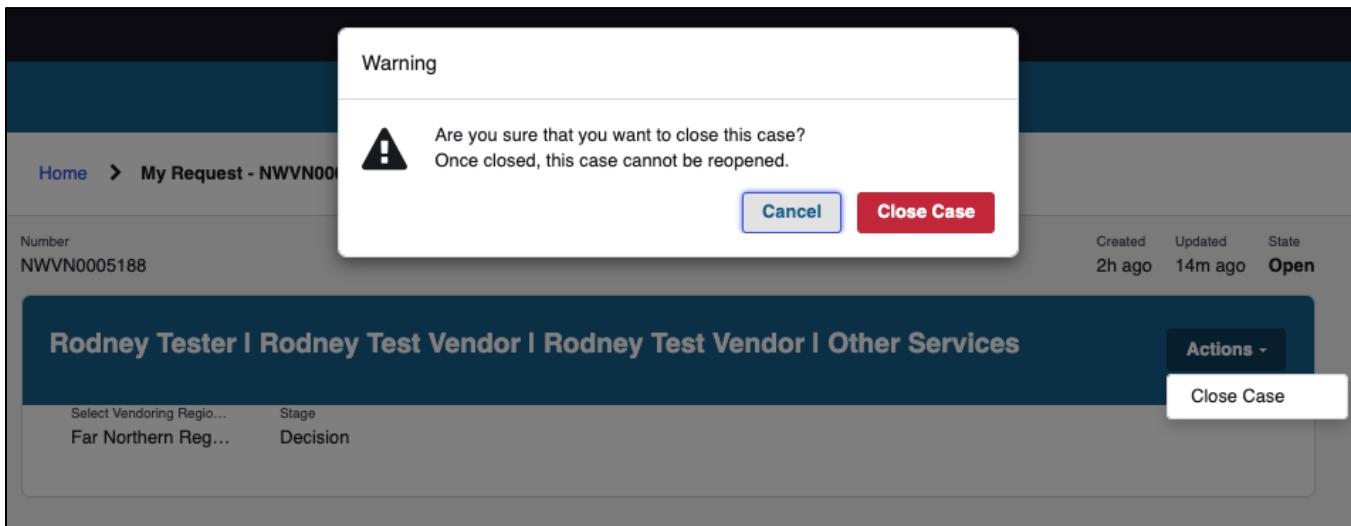


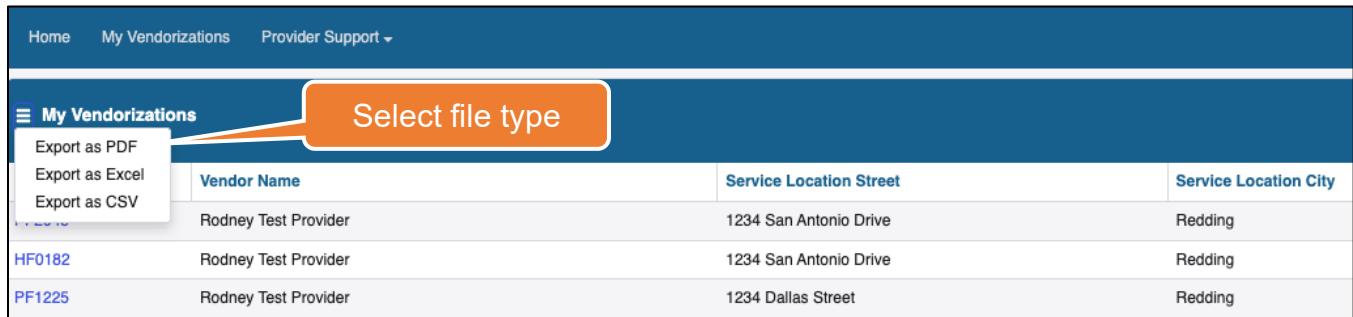
Figure 7.2: My Request: Close Case

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.



My Vendorizations			
	Vendor Name	Service Location Street	Service Location City
1234	Rodney Test Provider	1234 San Antonio Drive	Redding
HF0182	Rodney Test Provider	1234 San Antonio Drive	Redding
PF1225	Rodney Test Provider	1234 Dallas Street	Redding

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).

A screenshot of a web-based provider services dashboard. At the top, there is a navigation bar with 'Home', 'Business Location Support', 'Services', a search bar, and a magnifying glass icon. Below the navigation, there is a sidebar titled 'Categories' with 'Services' and 'Support' options. The main content area is titled 'Services' and contains three service cards. The first card is 'Apply for Vendorization' with a description 'Become a Service Provider | Existing Provider - Additional Vendorizations' and a 'View Details' button. The second card is 'View or Update Parent...' with a description 'Existing Service Provider and need to update Parent Organization information? Start here' and a 'View Details' button. The third card is 'View or Update Vendor...' with a description 'Existing Service Provider and need to update your information? Start here.' and a 'View Details' button. An orange callout bubble with the text 'Click' points to the 'View or Update Parent...' card.

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.

View or Update Parent Organization Information

Existing Service Provider and need to update Parent Organization information? Start here

\* Indicates required

Parent Organization you would like to update

Rodney Test Provider

**Vendor Information**

Parent Vendor Name

Rodney Test Provider

Tax ID / SSN

123456789

Point of Contact

Rodney Test

Service Location Phone Number

(555) 555-5555

Service Location Email Address

rodney@test.com

**Service Address Information**

Service Location Street

1234 San Antonio Dr

Service Location City

Redding

Service Location State

CA

Service Location Zip Code

96003

Service Location County

Mailing Street

Mailing City

Mailing State

Mailing Zip Code

Mailing County

Comments

\* Change Parent Vendor Name

Rodney Test Provider

\* Change Tax ID / SSN

123456789

\* Change Point of Contact

Rodney Test

\* Change Service Location Phone Number

(555) 555-5555

\* Change Service Location Email Address

rodney@test.com

\* Change Service Location Street

1234 San Antonio Dr

\* Change Service Location City

Redding

\* Change Service Location State

CA

\* Change Service Location Zip Code

96003

\* Change Service Location County

\* Change Mailing Street

\* Change Mailing City

\* Change Mailing State

\* Change Mailing Zip Code

\* Change Mailing County

Submit

Click

Change as needed

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.
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#### *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](mailto:ProviderDirectory@dds.ca.gov).