Organization Provider How Do I … Guide

December 15, 2013

The Florida Safe Families Network (FSFN) How Do I Guide helps you understand the steps to complete your work in the FSFN system. It is a desk reference and companion document to other supporting resources such as, User Guides and Online Help. Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for additional resources.

How Do I…

Create an Organization Provider

How Do I…?	Selections	Tips & Guidelines
Create an Organization Provider	• From Desktop, select **Create** > **Provider Inquiry** > **Organization Provider**. **Organization Provider** page displays. • From **Basic** group box, select Provider Type drop down.	*For updates, the Organization Provider page can be accessed through the Providers expando on the Desktop by selecting the Provider Name hyperlink.*
Complete the Provider tab	• From **Provider** tab, enter demographic information. • From **Further Information** group box, select appropriate check box. • Select the **Tax ID Number** radio button, If applicable. • Enter provider's **FEIN** or **SSN**. Or, select **N/A** indicating that a Tax ID number is not applicable. • Enter applicable **Contact Information**.	*The Director field under the Contact Information expando is derived from a Person Search.*
Complete the Characteristic tab	• Use this to associate characteristics with provider for use in searching for provider	*You may Add All values or Remove All values.*

Document Information on the Basic Tab

How Do I…?	Selections	Tips & Guidelines
Document information in Schools/Child Care group box	• Within **Schools/Child Care** group box, click **Insert**, if applicable. • A new row is inserted. • Enter text in **Schools/Child Care** group box.	*This field allows users to associate one or more schools/child care facilities with a provider.*

Document Information on the Basic Tab		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information in Vendor ID group box	• Within **Vendor ID** group box, click **Insert**, if applicable. • Enter value in **Fiscal Agency** field. • Enter value in **Vendor ID** field. • Click **Delete** hyperlink, if applicable.	*Fiscal Agency field is used in combination with the Vendor ID field to store a provider's Vendor ID number with a Fiscal Agency.* *The Fiscal Agency field is not required unless the Insert button is clicked.* *The Delete hyperlink is conditionally displayed and enabled when the Insert button is clicked.*
Document information in Operational Hours group box	• Enter text in **Operational Hours** group box (No label).	*The field allows the user to maintain information about the hours of operation for the resource.*
Search and retrieve the Director name under Contact Information expando	• Under **Contact Information** expando, click on **Search** hyperlink. • Conduct Person Search. • Selected person's name is added to **Director** field.	*Selected person's name is added to the Director field.*

Document Information on the Characteristics Tab		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on Characteristics tab	• From **Provider Accepts** and **Other Provider Characteristics** group boxes, add or remove selected **Possible Values** to **Selected Values**. – Hold down Ctrl key to multi-select values.	*The Characteristics tab allows the recording of helpful information that assists the user when making placement decisions for a child.* *The Characteristics tab includes what the Provider Accepts and Other Provider Characteristics the provider have.* *This tab is displayed in view-mode when accessed by users without an assignment to the provider.* *The user can select one, none, many, or all values.*

Document Information on the Services Tab		
How Do I…?	**Selections**	**Tips & Guidelines**

Document information on Services tab	• Within **Provider Capacity** group box, enter a value in **Total Bed Capacity** field.
	• Within **Clients by gender** group box, enter a value in **Preferences** field for number of children by gender.
	• Within **Clients by gender** group box, review value in **Placements** field for number of children by gender.
	• Within **Clients by gender** group box, review value in **Reservations** field for number of slots currently being reserved for children with provider.
	• Within **Clients by Age** group box, review value in **Members** field for number of household members currently in household who are under age of 2.
	  – This field is disabled in Organization Provider and have no significance.
	• Within **Clients by Age** group box, review value in **Placements** field for number of placements currently in household for children who are under age of 2 years old.
	• Within **Clients by Age** group box, review value in **Reservations field** for number of bed reservations currently being held for slots in household for children who are under age of 2 years old.
	• Within **Clients by Age** group box, enter a value in **Preferred Age** field for range of potential placements.
	  – If Preferred Age fields are not between 0 and 17 inclusive, on save processing user will receive an error message stating "Invalid Family Preferred Age."
	• In **Service Specifics** group box, select **All Fiscal Agencies** radio button, if applicable.
	• In Service Specifics group box, select
		This tab maintains current information about the specific services offered by an Organization Provider. It has the following major features:
		• *Allows the user to associate multiple non-licensed services to a given family, which can be viewed in the Service Specifics group box (licensed services are assigned to a provider via the License page.)*
		• *Displays the capacity, number of placements, number of reservations and current vacancies with the home for each out of home service type.*
		• *Displays the active non-licensed and licensed services in the Service Specifics group box. Services with a status of Inactive will not be displayed on this tab.*
		• *Within the Clients by gender group box, the Preferences field is required.*
		• *Within the Clients by gender group box, the Placement and Reservations fields are system derived numeric fields. These fields default to '0'.*
		• *Within the Clients by Age group box, the Members, Placements, and Reservations fields are system derived numeric fields. These fields default to '0'.*
		• *Within the Clients by Age group box, the Preferred Age field, defaults to '0' and '17' for the From and To fields, respectively.*
		
		When the Fiscal Agency specific radio button is selected in the Service Specifics group box, only the non-licensed and licensed services for the selected Fiscal Agency will be visible in the Service Specifics group box.
		
		When the Fiscal Agency specific radio button is selected in the Service Specifics group box, the Edit Other Services hyperlink is available for selection for Fiscal Agency users assigned to the provider record.
		
		The Service Details group box shows the details for the selected row in the Service Specifics group box. To select a row, the user selects the radio button to the left of the appropriate record in the Service Specifics group box. The corresponding information is visible in the Service Details group box. The fields in the Service Details group box are disabled.
		
		To update capacity information for a non-licensed service, the user must navigate to the Edit Other Services page, accessed from the Services tab. Capacity information for licensed

Document Information on the Services Tab		
How Do I…?	**Selections**	**Tips & Guidelines**
	value from Fiscal Agency specific drop down, if applicable. • Within **Other Services and Licensed Services** group box, review **Fiscal Agency** field. • Within **Other Services and Licensed Services** group box, review **Category** field. • Within **Other Services and Licensed Services** group box, review **Type** field. • Within **Other Services and Licensed Services** group box, review **Status** field. • Within **Service Details** group box, review **Capacity** field. • Within **Service Details** group box, review **Placements** field. • Within **Service Details** group box, review **Reservations** field. • Within **Service Details** group box, review **Vacancies** field. • Within **Service Details** group box, select a radio button for **a non-licensed** or **licensed** service record. • From **Service Specific** group box, access **Bed Reservation** page for selected service record, if applicable • From **Service Specific** group box, access **Provider Service Rate** page for selected service record, if applicable • From **Service Specific** group box, access **Service Rate** page for selected service record, if applicable • Click **Save**. • Click **Close**.	*services cannot be updated through the Services tab or associated pages.* *Only non-licensed services with a status of Active will appear in the Other Services group box.* *Licensed services will appear in the Licensed Services group box when there is a currently active license for the provider.* *When a radio button is selected for a non-licensed or licensed service record, the Service type is present, the Service rate is not present, and the Service Rate value is available for selection in the Options drop down.* *When a radio button is selected for a non-licensed or licensed service record service type and the service rates are available, the Provider Service Rate value is available for selection in the Options drop down.* *When a radio button is selected for a non-licensed or licensed service record and the Bed Reservation value is selected in the Options drop down, the page opens in edit mode for users with an assignment to the provider.* *If a user wants licensed services added/maintained, an offline process must occur between that user and the Fiscal Agency user, with the appropriate security, associated with that provider.* *The Fiscal Agency users, with the appropriate security, associated with that provider would then make the needed service changes on the License page, which then pre-fills to the Licensed Services group box on the Services tab.* *Fiscal agency users add Other Services by selecting their Fiscal Agency in the Fiscal Agency drop down and clicking the Edit Other Services hyperlink.*

Document Information on the Provider Repayment Method pop-up page		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on the Provider Repayment Method pop-up page	• Access **Provider** tab. • From **Options** menu, select ***Provider Repayment*** to access **Provider Repayment Method** pop-up page. • Click **Go** button. • Review **Fiscal Agency** field. • **Fiscal Agency** field is enabled if user is a Fiscal Worker. – If user has only one Fiscal Agency based on their log-in, field defaults to that Fiscal Agency. – If user is associated with more than one Fiscal Agency, field displays list of these Fiscal Agencies. • Select radio button next to **Reduce by Total Payments Amount –Allow Negative invoices** field, if applicable. • Within **Repayment Method** group box, select radio button next to **Reduce Future Payments by Monthly Amount-Do Not Allow Negative Invoice**, if applicable. • Within **Repayment Method** group box, select radio button next to **Reduce Future Payments by Monthly Amount**, if applicable. • Select **Override** checkbox, if applicable. • Click **Save**. • Click **Close**.	*This page can only be accessed by a user from a Fiscal Agency associated with the provider.* *If selected Fiscal Agency has not been designated a Repayment Method for this Provider, following edit message will be displayed: "There is no Repayment Method for this Fiscal Agency for this Provider."* *Fiscal Agencies use this page to manage the provider repayment method at the Fiscal Agency level. This means that each Fiscal Agency can maintain a repayment method for each provider. Users can also indicate that the repayment method for a Fiscal Agency will be handled at the individual payment level.* *Reduce By Total Overpayment Amount - Allow Negative Invoice field designates that the total overpayment amount (less any existing adjustments) should be removed from the provider's next check from this Fiscal Agency, regardless of if it results in a negative invoice.* *Reduce By Total Overpayment Amount - Do Not Allow Negative Invoice field designates that the total overpayment amount (less any existing adjustments) should be removed from the provider's next check from this Fiscal Agency, but not allowing this to result in a negative invoice* *Reduce Future Payments by monthly amount field designates that the amount entered in the Monthly Amount field should be removed from the provider's next check from this Fiscal Agency. This option is the default selection for new providers.*

Document Information on the Bed Reservation pop-up page		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on the Bed Reservation pop-up page	• On **Services** tab, within **Specifics** group box, select radio button to left of desired service row. • From **Options** drop down, select **Bed Reservation** to access **Bed Reservation** pop-up page. • Click **Go** button. • Use **Expiration** field to review expiration date of reservation. • Select **Release Bed** check box, if applicable to release a reserved bed if it is no longer needed.	*The pop-up page allows the user to view the status of the bed reservations with regard to both the Child and the Worker involved.* *The Child, Worker, and Expiration fields are pre-filled based on any current reservations associated with the provider.*

Document Information on the Provider Background Screening pop-up page		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on the Provider Background Screening pop-up page	• Access **Provider** tab. • From **Options** drop down select ***Background Screening***. • Click **Go** button. • Click **Insert** to add a new record to **Screened Records** group box • Document **Expiration Date** of background screening for following agencies: Local Law Enforcement; Florida Department of Law Enforcement (FDLE); Federal Bureau of Investigation (FBI); and Florida Abuse Registry. • Request a State **Abuse Registry check** for Director of an Organization Provider. • Click **Save**. • Click **Close**.	*The Provider Background Screening page is used by licensing and caseworkers to record and manage background screenings done on the Director of an Organization Provider.* *This is critical to track background screening of agency directors because expired background screenings affect the provider license, as well as potentially affect IV-E eligibility for children in placement.* *On the Provider Background Screening page, the user documents the expiration date of the background screening for the following agencies: Local Law Enforcement; Florida Department of Law Enforcement (FDLE); the Federal Bureau of Investigation (FBI); and Florida Abuse Registry.* *Additionally, the user must request an Other State Abuse Registry check for each state where the Director of an Organization Provider has resided in the last five years if not in Florida.* *In most circumstances, each agency request has different expiration dates. A Local law Enforcement record check is valid for one year, a FDLE record check is valid for five years, and an FBI record check is done once at initial licensure. A Florida Abuse Registry record check is done at initial licensure and each re-licensure.* *The exception to these timeframes occurs if there is a 90-day break in service for the provider. New background screenings must be done.*

Document Information on the Provider Service Rate pop-up page		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on Provider Service Rate pop-up page	• Access **Provider** page and click **Services** tab. • From **Options** drop down, select ***Provider Service Rate***. • Click **Go**. • **Provider Service Rate** pop-up page displays. • Click **Insert**. • Enter relevant information in **Effective Date**, **Contract ID**, **Contract Capacity**, **Rate Period**, **Rate** and **Over-Capacity Rate**, if applicable.	*Contract Capacity and Over-Capacity Rate fields are enabled and required if selected service type is Fixed Price on the Service Type page.* *Effective Date, Rate Period, and Rate are required fields.* *If Fixed Priced check box is selected on the Service Type page and no value is entered into the Contract Capacity or Over-Capacity Rate text boxes on the Provider Service Rate page, the user will receive an error message "You must input a value for Contract Capacity and Over Capacity Service Rate page for Fixed Priced service types".* *If Multiple is selected on the Service Type page, choosing the Select radio button enables the Insert button in the Multiple Rate Categories group box where the fiscal user can enter one to many reporting categories and associated rates.* *The Provider Service Rate pop-up page can only be accessed by a user from a specific Fiscal Agency associated with the provider.*

Document Information on the Edit Other Services pop-up page

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<tr><th>How Do I…?</th><th>Selections</th><th>Tips & Guidelines</th></tr>
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<td>Document information on the Edit Other Services pop-up page</td>
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Access Services tab.
From Service Specifics group box, select appropriate Fiscal Agency from Fiscal Agency specific drop down box.
Click Edit Other Services hyperlink.
Edit Other Services page will display for selected Fiscal Agency and Fiscal Agency’s name will be displayed in header information on this page.
Click Insert button. This inserts a new service record to Other Service group box.
Edit Category, Type, Total Capacity, and Contract ID fields, if applicable.
Click on Delete hyperlink. A notification message stating “Are you sure you want to delete currently selected information?” is displayed. Select Yes, if applicable.
Service type record is removed from Other Services group box and user is returned to Edit Other Services page.
If capacity information on Services tab has been updated but not saved, a notification message stating, “This action will save the Organization Provider information. Do you want to continue?” is displayed.
Click Yes, if applicable. Capacity information is saved and user is navigated to Edit Other Services page.

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The header information on the Edit Other Services page fills with the values from the Organization Provider page.
The Fiscal Agency users, with the appropriate security, associated with a provider can only make the needed service changes on the Edit Other Services Pop-up page.
The Edit Other Services page is used to record non-licensed service types for an Organization Provider.
For in-home Services, the Total Capacity field is disabled.
Assigned Fiscal User with appropriate security can only edit the information in this page.
The Edit Other Services page is the area in which service capacities and statuses can be updated.
These properties cannot be updated on the Services tab.
When a new record is added to the Other Services group box, the Category values are filtered based on the Fiscal Agency selected on the Services tab. This same Fiscal Agency is displayed on the header of the Edit Other Services page.
On selecting a Category value for a new service record, the Type field becomes enabled and required. The values in the Type field are filtered based on the value selected in the Category field.
The Delete hyperlink is enabled when a service record is newly added to the Other Services group box and initial save processing has not been triggered
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