Person Provider How Do I … Guide

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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…

Complete the Home tab

How Do I…?	Selections	Tips & Guidelines
Document information in Basic Group box	• From **Providers** expando, click provider name. • **Home** tab displays. • **Person Provider** page consists of following tabs: – Home – Members – Characteristics – Services – Training – Merge/Name History • Within **Basic** group box, review **Type** field. • Within **Basic** group box, review **Status** field. • Within **Home Information** group box, select a **Primary Language**. • Select a **Marital Status** value. • Within **Alternate Contact Information** group box, enter **Alternate Contact Name**, **Alternate Contact Phone** number, and any additional information, including additional contacts, if applicable. • Within **Further Information** group box, select appropriate tax identification radio button. • Within **Further Information** group box, enter provider's **FEIN** or **SSN**. • Click **Insert** to add a row, If applicable. • Select **ICWSIS District** and **ICWSIS ID** from respective drop downs. • Click **Save**.	*The Person Provider page is used to document the attributes of Person Providers.*
Document information in Schools/Child Care group box	• Within **Schools/Child Care** group box, click **Insert**, if applicable. • Enter text in **Schools/Child Care** group box.	*This field allows users to associate one or more schools/child care facilities with a provider.*

Complete the Home 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. • Within **Vendor ID** group box, 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 is optional unless the Insert button is clicked.* *Note: 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.	*Notice that the Parent Agency field is pre-filled with the Parent Agency of the provider (if applicable).* *The field allows the user to maintain information about the hours of operation for the resource.* *This field is system-derived from the Parent Agency History page, is not user modifiable, and defaults to the name of the home member identified as Caregiver 1 during the Person Provider Inquiry.*

Complete the Members tab

How Do I…?	Selections	Tips & Guidelines
Complete the Members tab	• Click **Members** tab. • From **Household Members** group box, select role of ***Caregiver 1***. This information pre-fills Home tab. Designation of Caregiver1 role is required. • Click case name hyperlink to update household member's Person Management Record. • Click **Remove** hyperlink to delete a household member from Person Provider page. • Click **Insert** to add a new member to household. • **Person Search** page displays. • Enter search criteria. • If a match is found, click **Continue**. • If no match is found, click **Create** to open a new Person Management Record. • Click **Continue** after record is created and saved. • From **Non-Household Members** group box, select role and description for non-household members. • Click case name hyperlink to update non-household member's Person Management Record. • Click **Remove** hyperlink to delete a household member from Person Provider page. • Click **Insert** to add a new member to non-household group box. • **Person Search** page displays. • Enter search criteria. • If a match is found, click **Continue**. • If no match is found, click **Create** to open a new Person Management Record. • Click **Continue** after record is created and	*Use the Delete hyperlink to delete a person mistakenly added to the household before saving the Person Provider page.* *When searching for a person using the SSN field then the following guidelines need to be used.* *You cannot enter a SSN with the following:* • *The first three digits of 000, 666, 900 series.* • *The second two digits of 00 or the last four digits of 0000.* • *The sequential numbers, 123-45-6789 will not be allowed, and numbers that are all the same, such as all 1s, 2s, etc.* *The system will identify and make visible (via bolded text) any duplicated social security numbers.* *When creating or updating a person in the Provider record, if you try to update or create a person determined by the system to have a duplicate SSN, the Potential Person match page will open. You will have to review every duplicate displayed on the Potential Person Match page before the system will allow the duplicate SSN. Once viewed, the person's record will display the Viewed icon with a check mark. After the duplicate records have been viewed, the Allow Duplicate SSN button will be enabled.* *If the role of a provider member is changed to Caregiver 1, resulting in a change to the provider's name, the previous provider name is saved as an additional name with a type of Previously Known As.* *The rows for Caregiver 1 and 2 are disabled for a Licensed Provider unless the user accesses this page from the License page.*

Complete the Members tab		
How Do I…?	**Selections**	**Tips & Guidelines**
	saved.	
Update, reactivate, or remove a Person Provider Name	• From **Members** tab within **Home Members** group box, click **Modify** hyperlink next to the appropriate person's name. • From **Reason** drop down, select a reason for action. • Enter **Effective Date**. • Click **Save**. • Click **Close**. • For non-household members, click **Delete** hyperlink to remove participant. • Click **Save**. • Click **Close**.	*If the user clicks the Delete hyperlink, the following validation message displays, "This option will delete the non-household member. Do you want to complete?"*

Complete the Characteristics tab		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on the Characteristics tab	• Within **Family Accepts** group box, use CTRL key to select multiple values from **Possible Values** list. • Click **Add**, **Add All Values**, **Remove**, or **Remove All Values** button, whichever is applicable. • Within **Other Family Characteristics** group box, use CTRL key to select multiple values from **Possible Values** list. • Click **Add**, **Add All Values**, **Remove**, or **Remove All Values** button, whichever is applicable. • Click **Save**. • Click **Close**.	*The Characteristics tab allows the recording of helpful information that assists the user when making placement decisions for a child.* *The Characteristics tab documents what the Family Accepts and what Other Family Characteristics the providers 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.*

Complete the Services tab

How Do I…?	Selections	Tips & Guidelines
Document information in Services tab	• Enter a value for **Provider Capacity**. • From **Clients by Gender** group box, enter a value in **Preferences** field for number of children by gender; document Male, Female, and Total. • Within **Clients by Gender** group box, review value in **Placements** field for number of children by gender; review Male, Female, and Total values. • Within **Clients by Gender** group box, review value in **Reservations** field for number of slots currently being reserved for children with provider; review for Male, Female, and Total. • 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 years old. • 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. • Within **Service Specifics** group box, select **All Fiscal Agencies** radio button if applicable. • Within **Service Specifics** group box, select a 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** and **Status** field. • Within **Service Details** group box, review	*This tab maintains current information about the specific services offered by a Person Provider. It has the following major features:* *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.* *Preferences field within Clients by Gender group box is required.* *Placement field and Reservations field within Clients by Gender group box are system derived numeric fields. These fields default to 0.* *Within Clients by Age group box, the Members field, Placements field, and Reservations field are system derived numeric fields. These fields default to 0.* *Within Clients by Age group box, the Preferred Age field defaults to 0 and 17 for the From and To fields, respectively. These fields are documented as a From and To range.* *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 link 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 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*

Complete the Services tab		
How Do I…?	**Selections**	**Tips & Guidelines**
	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. • Select a radio button for a **non-licensed** or **licensed** service record.	*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, and the Service rate is not present, the Service Rate value is available for selection in the Actions list box.* *When a radio button is selected for a non-licensed or licensed service record service type and service rates are available, Provider Service Rate value is available for selection in the Actions list box.* *When a radio button is selected for a non-licensed or licensed service record and the Bed Reservation is selected from the Actions list box, 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 would then pre-fill to the Licensed Services group box on the Services tab.*

Complete the Services tab		
How Do I…?	**Selections**	**Tips & Guidelines**
Edit/view Provider Service Rate pop-up page	• Click **Services** tab. • From **Options** drop down, choose a **Provider Service Rate**. • Click **Go**. • **Provider Service Rate** pop-up page displays. • Within **Provider Services** group box, enter applicable **Effective Date** for Service Rate. • From **Rate Period** drop down, select ***Monthly***, if applicable. • Enter applicable daily or monthly Rate. • Select **Select** radio button to select one row. • Click **Delete** hyperlink to delete associated row. • Within **Multiple Rate Categories** group box, select a category from **Reporting Category** drop down. • In associated **Rate** numeric field, enter rate. • Click **Delete** hyperlink to delete associated row. • Click **Continue** - if multiple rates or updates are entered, the total of reporting category rates equals rate on associated provider service rate row. • Click **Close**. • **Person Provider** page displays.	*The Rate field defaults to Daily.* *It is possible to break down the provider rate into multiple reporting categories.* *Reporting categories appear in the drop down only if the reporting category effective date on the Other Cost Accumulator page is on or before the provider rate effective date.* *The reporting category inactive date on the Other Cost Accumulator page must be blank or on or after the provider rate effective date.* *If the reporting category was previously saved and is now inactive, it displays with "Inactive" and the inactive date in parentheses "(mm/yyyy)" appended to the description.*
Document information in the Bed Reservation pop-up page	• From **Person Provider** page within **Actions List Box**, click **Bed Reservation** hyperlink. • View expiration date of reservation in **Expiration** field. • Select **Release Bed** check box 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.*

Complete the Services tab

How Do I…?	Selections	Tips & Guidelines
Document information on the Edit Other Services pop-up page	• Click **Services** tab. • Within **Service Specifics** group box, select appropriate Fiscal Agency from **Fiscal Agency** drop down. • Click **Edit Other Services** hyperlink. • **Edit Other Services** page displays for selected Fiscal Agency and Fiscal Agency's name will display in header information on this page. • Header information on **Edit Other Services** page pre-fills with values from **Person Provider** page. • Click **Insert** to insert a new service record to **Other Service** group box. • Select reference values for **Category** and **Type** fields. • Click **Delete** hyperlink. • 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. • Select **Yes**, if applicable. • Capacity information is saved and user is returned to **Edit Other Services** page.	*The Status field defaults to Inactive.* *Only the Fiscal Agency users, with the appropriate security, associated with a provider can 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 a Person Provider.* *For in-home Services, the Total Capacity field is disabled.* *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.* *When selecting Category and Type reference values, if the three conditions are met, the user receives a message that states 'Statewide rates exist for this service type and provider. After saving your changes, please review the copied over rates.* *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.* *After clicking the Delete hyperlink, the user receives a notification message stating "Are you sure you want to delete currently selected information?" If the user selects Yes, the service type record is removed from the Other Services group box and the user is returned to the Edit Other Services page.*

Complete the Training tab		
How Do I…?	**Selections**	**Tips & Guidelines**
Document Information on the Training tab	• Click **Insert** button to add a new record to **Course Listing** group box. • Select a value from **Member** drop down. • Select a value from **Training Type** drop down. • Select a value from **Pre-Service/In-Service Courses** drop down, other than ***Other Course***. • From **Pre-Service/In-Service Courses** drop down, select ***Other Course*** • Enter a value in **Other Course** field. • Enter date in **Start Date** field in MM/DD/YYYY format. • Enter date in **Date Complete** field, if applicable. • Click **Delete** hyperlink next to a Training record, if applicable.	*Users with an assignment to the provider are able to add and maintain training classes on the provider's record.* *The Delete hyperlink, located to the right of each training record, is enabled when an Insert button is clicked, and a new record is added to the Course Listing group box.* *If a new Caregiver 1 or Caregiver 2 is inserted into the Members tab, they will not display in the Member drop down until the Person Provider record is saved.* *The Member drop down is a required field.* *Training Type drop down is a required field. The selection from this drop down drives the selections displayed within the Pre-Service/In-Service Courses drop down.* *Other Course field is conditionally required if Other Course value is selected in the Pre-Service/In-Service Courses dropdown.* *Only if the Pre-Service/In-Service Courses drop down value is Other Course, is the Other Course text box enabled and required. For all other values in the Pre-Service/In-Service Courses drop down, the Other Course text box is not required.* *If the value in the Pre-Service/In-Service Course drop down changes from Other Course to any other value, any text in the Other Course text box is erased.* *When a Delete hyperlink is selected, the user receives a notification message stating "Are you sure you want to delete currently selected information?" If the user selects Yes, the training record is removed from the Course Listings group box and the user is returned to the Training tab.* *The sorting order of the list is based on the completion date of the course. This will display the most current training history first.* *The Start Date field is required.* *The Delete hyperlink is not available for users without an assignment to the provider.*

Document Merge/Name History tab

How Do I…?	Selections	Tips & Guidelines
Document information on the Merge/Name History tab	• Review Provider Merge History. • Review Additional Names. • Click **Save**. • Click **Close**.	*The Merge/Name History tab maintains a history of the removed providers merged into the current Person Provider.*

Create Unified Home Study/Background Checks

How Do I…?	Selections	Tips & Guidelines
Create a Unified Home Study	• From **Person Provider** page within **Actions List Box**, click Unified Home Study hyperlink. • On **Unified Home Study** pop-up page, click **Create**. • Fill in appropriate fields on **Unified Home Study** page. • Launch Unified Home Study template and fill in appropriate values. • Click **Close and Return to FSFN** button. • Approve the Home Study record. • Click **Save**. • Click **Close**.	*The Unified Home Study is used to document information about the person provider as determined by examining the home.* *The Unified Home Study template was modified. If a new Unified Home Study is produced using the copy-over function and selecting a UHS created prior to today's date, the template will contain language that is out of compliance with Florida Statutes and departmental policy.*

Create Unified Home Study/Background Checks		
Request Background Checks	• From **Person Provider** page within **Actions List Box**, click **Unified Home Study** hyperlink. • On **Unified Home Study** page, click **Create**. • Click **Background Check Information** tab. • On **Background Check Information** tab select **Background Check?** check box next to participant's name. • On **Background Check Information** tab select radio button to note if Fingerprints results have been received. • On **Background Check Information** tab enter date fingerprint results were received. • On **Background Check Information** tab Select a fingerprint status from drop down. • Click **Request Background Check** button.	*Users may request background checks from the Unified Home Study page if the request type is Planned or Emergency Placement. In order to save the UHS prior to requesting the background checks, the user must complete the Type and Person Conducting the Search. For approval of the UHS, all required fields must be completed.*

Document Parent Agency History

How Do I…?	Selections	Tips & Guidelines
Document Information on Parent Agency History pop-up page	• From **Person Provider** page within **Actions List Box**, click **Parent Agency History** hyperlink. • **Scenario 1**: Enter a **Start Date** that is greater than current system date, and click **Continue**. • Note that an error message, "*Start Date cannot be greater than Today's date.*" is displayed. • **Scenario 2**: Do not enter an **End Date** for old parent agency record, and click **Continue**. • Observe that an error message, "*Please enter the End Date for the last Parent Agency.*" is displayed. • **Start Date** of new Parent Agency must be equal to or greater than **End Date** of previous Parent Agency. • Enter an end date for old parent agency. This date is same as start date for new parent agency.	*The Parent Agency History pop-up page is used to document the provider's Parent Agency history.* *If the entered information passes all business validations, the Parent Agency History page is closed and the user is returned to the Home tab on the Person Provider page.* *When a new provider is returned to the Parent Agency History page and clicks the Continue button, the user will receive an error message, "Please enter Start Date for the New Parent Agency."* *If a user has returned a new provider to the Parent Agency History page, enters a Start Date that is greater than the current system date, and clicks the Continue button, the user will receive an error message "Start Date cannot be greater than Today's date."* *If a user has returned a new provider to the Parent Agency History page, does not enter an End Date for the old parent agency record, and clicks the Continue button, the user will receive an error message, "Please enter the End Date for the last Parent Agency."* *If a user has returned a new provider to the Parent Agency History page, enters an End Date that is less than the Start Date for the old parent agency record, and clicks the Continue button, the user will receive an error message, "The End Date should be greater than or equal to the Start Date for the Previous Parent Agency."* *There cannot be a gap in the End Date of the previous Parent Agency and the Start Date of the new Parent Agency.*

Document Provider Repayment Method

How Do I…?	Selections	Tips & Guidelines
Document information on the Provider Repayment Method pop-up page	• From **Person Provider** page within **Actions List Box**, click **Provider Repayment Method** hyperlink. • **Provider Repayment Method** pop-up page displays. • Review **Fiscal Agency** field. • If a repayment method record exists, **Fiscal Agency** equals Worker's Fiscal Agency. • If repayment method record does not exist, record is created when worker clicks **Save**. • **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. • 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.*" • Within **Repayment Method** group box, 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** field, if applicable. • Within **Repayment Method** group box, select radio button next to **Reduce Future Payments by Monthly Amount**, if applicable. The monthly Amount field is **enabled** and **required.** • Click **Save**. • Click **Close**.	*This page can only be accessed by a user from a Fiscal Agency associated with the provider.* *It can only be viewed by the Licensing Specialist assigned to the 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.* *Selecting the radio button next to the Reduce by Total Payments Amount –Allow Negative invoices field clears and disables the monthly amount field.* *Selecting the radio button next to the Reduce Future Payments by Monthly Amount-Do Not Allow Negative Invoice field clears and disables the monthly amount field.* *Selecting the radio button next to the Reduce Future Payments by Monthly Amount field enables and makes the field mandatory.*

Document Provider Background Screening		
How Do I…?	**Selections**	**Tips & Guidelines**
Document information on the Provider Background Screening pop-up page	• From **Person Provider** page within **Actions List Box**, click **Background Screening** hyperlink. • Click **Insert**. A new record is added 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 each state where provider and household members have resided in last five years. • Click **Save**. • Click **Close**.	*For each member of the provider's household, age 12 and above, a background screening must be done prior to licensing the provider. The length of time the background screening is valid depends on the agency that sent the request.* *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 at each re-licensure.*

View Active Child Placement Agreements		
How Do I…?	**Selections**	**Tips & Guidelines**
View an active Child Placement Agreement from an existing Person Provider record	• From **Person Provider** page , **Members** Tab, **Child in Placement** Group Box, Select either **Behavior Management Plan** or **Care Precautions** hyperlink. • Click **Close**.	*The Child Placement Agreement column displays to the left of the characteristics column.* *If the child that is currently placed with the Person Provider has an active Behavior Management Plan, the Behavior Management Plan hyperlink displays.* *If the child that is currently placed with the Person Provider has an active Care Precautions plan, the Care Precautions hyperlink displays.* *If the child that is currently placed with the Person Provider has no active Child Placement Agreement, No will display.* *If the Person Provider page was accessed from Desktop and user has security access rights, the select Child Placement Agreement will launch in Edit Mode.*