How do I…Provider

How Do I…?	Selections	Tips & Guidelines

Create a Person Provider Inquiry Search	▪ From the Desktop menu, select *Create* > *Provider Inquiry* > *Person*. The Search Person page displays.
	▪ Enter Search criteria, and then click **Search**.
	▪ If there is a match, *select* the desired Person(s) in the Persons Returned group box.
	  ▪ Click **Add Participant**.
	  ▪ Click **Continue** to return to the Person Provider Inquiry page populated with the participant information, or click **Close** to end the Search process.
	▪ If there is not a match, click **Close** on the message.
	▪ Click **Create**. The Create Person page displays.
		To create a new person provider, you must first search to verify the provider does not already exist in FSFN. This avoids duplication of providers and person records in FSFN.
		
		Click the Expando to enter additional search criteria.
		
		Use the Search Precision feature to refine (High setting) or expand (Low setting) your search. Remember, High equals an exact match.

Create Person Provider Member	▪ Complete a Person Provider Inquiry search for the participant. ▪ For no matching search results, click **Create**. The Create Person page displays. ▪ Enter applicable person information, address (including zip code), and Home Phone. ▪ Click **Continue**. The Address Normalization page displays. ▪ Select a Radio Button and then click **Continue**. The Search page displays. ▪ The Person Provider Inquiry page displays. ▪ If there are more adults in this Provider Home, enter the name, search, and select/create as above. ▪ When all adults are searched and in the Participants box, click **Continue**.	*To open an existing Person Provider Inquiry, click the Intake Expando icon on the Desktop to display pending Person Provider Inquiry.*
Complete the Member tab	▪ Select the Member tab. ▪ Select a *Role* for each household member.	*At least one member must have the role, Caregiver 1.*
Complete the Basic tab	▪ Select the Basic tab. ▪ From the Home Information group box, select the *Language* and *Marital Status* for Caregiver 1, if they were not pre-filled. ▪ From the Inquiry Information group box, select the *Inquiry Type*, Placement. ▪ From the Worker group box, verify the status as **Pending**. ▪ Click **Save**, and then click **Close**.	*Only while the status is Pending will the provider information display under Intakes on your Desktop.* *After the inquiry is performed, a decision is made to either accept or not accept the potential provider.*
Approve the Person Provider Inquiry	▪ From the Desktop, click the **Intakes** expando icon and then click the **My Intakes** expando. ▪ Click the *Person Provider Inquiry* hyperlink requiring completion. The Person Provider Inquiry page displays. ▪ From the Basic tab/ Workers group box, make selection: **Accept** or **Not Accept**. ▪ *Select* a Reason. ▪ Click **Save**, and then click **Close**. ▪ Close **Intakes** expando.	*If the status change is "Approved", the system places the Person Provider under the Desktop Provider expando.* *Note: After Approving the Inquiry, you must complete the Home and resource tabs of the person provider.*

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Complete the Home tab	▪ From the **Providers** expando, select the provider name. ▪ The Home tab is displayed. ▪ Select a *Lcns.Type* and a *Lcns. Agency* from the Basic group box. ▪ From the Alternate Contact Information group box, if applicable, enter the Alternate Contact's name. ▪ Enter the Alternate Contact's phone number and additional information, including additional contacts, where applicable.	*Selecting the Delete hyperlink deletes an existing Provider ICWSIS ID record.* *A notification message displays asking if you want to delete the record.*
Complete the Members tab	▪ Select the Members tab. ▪ Use the case name hyperlink to update the household member's Person Management Record, if needed. ▪ Use the Remove hyperlink to delete a household member from the Person Provider page. ▪ Use **Insert** to add a new member to the household. This displays the Person Search page. Enter Search criteria. ▪ If a match is found, click **Continue**. ▪ If no match is found, click **Create** to open a new Person Management Record, including the address. Select the *Address Normalization* radio button and click **Continue**. ▪ Click **Continue** at the bottom of the page to add the member.	*Use the Delete hyperlink to delete a person mistakenly added to the household before saving the Person Provider page.*
Complete the Resources tab	▪ Select the Resource Types tab. ▪ To add a Resource Type, select from Possible Values, and click Add. This will transfer the Possible Value to the Selected Values. ▪ To remove a Resource Type, select from Selected Values, and click Remove. This will remove the value from the Selected Value box. ▪ You may Add All values or Remove All values. ▪ Hold down the Ctrl Key to multi-select values. ▪ Click **Save**, and then click **Close**.	
Update, Reactivate, or Remove a Person Provider Name	▪ From the Members Tab, click the modify hyperlink next to the appropriate person's name in the Home Members group box. ▪ Select the *Reason* for the action. ▪ Enter the Effective Date. ▪ Click **Save**, and then click **Close**. ▪ **Save** and **Close** the Person Provider Page.	

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Create an Organization Provider	▪ From the Desktop, select *Create* > *Provider Inquiry* > *Organization Provider*. The Organization Provider page displays. ▪ From the Basic *group* box, select the provider Type. ▪ Select the *License type*. ▪ Select the *License agency*.	*For updates, the Organization Provider page can be accessed through the Providers expando on the Desktop by selecting the Provider Name hyperlink.*

Provider Tab	▪ From the Provider tab, allow the *Person* radio button or select the *Business* radio button.
	▪ Click the Search hyperlink. .
	▪ Enter the Search information. Click **Search**.
	▪ Enter applicable person information, address (including zip code), and Home Phone.
	▪ Click **Continue**. The Address Normalization page displays.
	▪ Select a Radio Button and then click **Continue**. The Search page displays.
	▪ The Person Provider Inquiry page displays.
	▪ If there are more adults in this Provider Home, enter the name, search, and select/create as above.
	▪ When all adults are searched and in the Participants box, click **Continue**. .
	▪ If there is a match, *select* the desired Person(s) in the Persons Returned group box.
	  ▪ Click **Add Participant**.
	  ▪ Click **Continue** to return to the Person Provider Inquiry page populated with the participant information, or click **Close** to end the Search process.
	▪ To insert an ICWSIS ID, if applicable.
	  ▪ Click **Insert**.
	  ▪ Select the *ICWSIS District*, and then enter the *ICWSIS ID*.
	  ▪ To delete an ICWSIS ID, click the Delete link.
	▪ From the Further Information group box, check the appropriate check box. If defaulted to EFT, do not make a selection.
	▪ Select the appropriate Tax ID Number radio button, If applicable, and then enter the provider's *FEIN* or *SSN*. If not, check N/A indicating that a Tax ID number is not applicable.
	▪ Enter applicable *Contact Information*.	

Resources Types Tab	▪ From the Resource Types tab, add or remove selected *Possible Values* to *Selected Values*. ▪ To add a Resource Type, select from Possible Values, and click Add. This will transfer the Possible Value to the Selected Values. ▪ To remove a Resource Type, select from Selected Values, and click Remove. This will remove the value from the Selected Value box. ▪ You may Add All values or Remove All values. ▪ Hold down the Ctrl Key to multi-select values. ▪ Click **Save**, select the Suggested Address radio button and click **Continue.** ▪ Click **Close**.	*You may Add All values or Remove All values.*

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Create a Physical Address	▪ From the Desktop Menu, select *Provider Work*. The Create Provider Work page displays. ▪ From the Maintenance dropdown list, select *Create Physical Address*. ▪ Select the Provider from the Provider group box. ▪ Click **Create**. The Create Physical Address pop-up page displays. ▪ From the Current Physical Address group box, enter the address information. ▪ Click **Save**, select the Suggested Address radio button and click **Continue.** ▪ Click **Close**.	*Use the vertical scroll bar on the right side of the page to view and complete all the address information.*
Maintain Physical Address	▪ From the Desktop Menu, select *Provider Work*. The Create Provider Work page displays. From the Maintenance dropdown list, select *Maintain Physical Address.* ▪ Select the *Provider* from the Provider group box. ▪ Click **Create**. The Maintain Physical Address pop-up page displays with pre-filled information in the Previous Physical Address group box. ▪ From the Current Physical Address group box, enter the updated information. ▪ Click **Save**, select the Suggested Address radio button and click **Continue.** ▪ Click **Close**.	
Create a Mailing Address	▪ From the Desktop Menu, select *Create* > *Provider Work*. The Create Provider Work page displays. From the Maintenance dropdown list, select *Mailing Address*. ▪ Select the Provider from the Provider group box, and then click **Create**. The Create Mailing Address pop-up page displays. ▪ From the Current Mailing Address group box, enter the new mailing address. ▪ Click **Save**, select the Suggested Address radio button and click **Continue.** ▪ Click **Close**.	*Use the vertical scroll bar on the right side of the page to view and complete all the address information.*
Maintain Mailing Address	▪ From the **Provider** Expando, click the selected Provider icon and then expand the Basic icon. ▪ Click the Provider Address hyperlink. The Maintain Mailing Address pop-up page displays with pre-filled information in the Previous Mailing Address group box. ▪ From the Current Mailing Address group box, enter the updated information. ▪ Click **Save**, select the Suggested Address radio button and click **Continue.** ▪ Click **Close**.	

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Create a Provider Note	▪ From the Desktop, click the Provider Expando icon. ▪ Click the Actions hyperlink next to the Provider's name. The Actions pop-up page displays. ▪ Select the *Create Provider Note* radio button, and then click **Continue**. The Provider Note page displays. ▪ Enter the Contact Begin Date/Time and Contact End Date if applicable. ▪ Select the Category. ▪ Select the Type. ▪ Enter the narrative. ▪ Click **Create** to add another narrative, if applicable. Click **Yes** to save changes. ▪ Click **Save**, and then click **Close**. ▪ Refresh the Provider Icon by collapsing it. ▪ Click on the Provider Icon again. Note that there is a Narrative Icon now. ▪ Click on the Icon. The type of Note and date created will display.	
Search for a Provider Note	▪ From the Desktop, click the Provider expando icon, and then click the Actions hyperlink next to the selected Provider's name. The Actions page displays. ▪ Select the *Provider Note Criteria Search* radio button, and then click **Continue**. The Provider Note Criteria Search page displays. ▪ Enter the Start and End Dates in the Note Criteria Group Box. ▪ From the Category and Type group box, select a category from the Categories list and then click the **Add** button to copy your selection to the Selected Categories list. ▪ Use the CTRL key to multi-select categories and then click the Add All button. This copies your selections to the Selected Categories list. ▪ If applicable, select *Remove* or *Remove All* from the Selected Categories list. ▪ Select a type from the Types list. ▪ Click **Search**. The Provider Note Search Results page returns with the search results.	*This is not working in UAT on 3/1. A Fatal Application Error is being displayed at Search. Incident written.*
Provider Note Search Results	▪ Search for a Provider Note. ▪ Select a worker's name from the Worker Creating Note dropdown to narrow your search results. ▪ Select the View hyperlink to view the Provider note or select the Print hyperlink to print the selected Provider note. ▪ If applicable, you can print all the search results. ▪ Select *View All Notes* from the **Options** dropdown list, and then click the **Go** button. ▪ If applicable, click **New Search** to start a new search. The Case Note Search Criteria page displays. ▪ Click **Close**.	