

How to Add an Agency or Foster Care Provider to a POC Provider Panel

(updated 5/31/2018)

As an element of eXPRS Plan of Care (POC) functionality, each Case Management Entity (CME) (such as a CDDP, Brokerage or CIIS Program) will have a **Provider Panel** associated with their agency. This provider panel is a list of the all providers (agencies, PSWs, Foster Care providers, consultants, etc.) who are to be authorized to provide services to I/DD individuals via an eXPRS POC. The CME's provider panel establishes the relationship between the provider and the CME for POC authorized services. The panel populates the provider drop-down menus for the CME when they authorize services in an eXPRS POC. In order to select and authorize a provider in a Service Prior Authorization (SPA) a Plan of Care, that provider's record ***must first be listed*** on the CME's provider panel.

To manage a CME's Provider Panel (add/remove or update listings), users must have one of the following eXPRS user roles:

- **Local Auth Provider Panel Manager** (for CDDPs)
- **Brokerage Provider Panel Manager** (for Brokerages)
- **State Kids Services Panel Manager** (CIIS/State Kids Res)


To add an Agency provider record to a CME Provider Panel:

1. Login to eXPRS. If users have more than one organization login option, use the Local Authority (for CDDPs)

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the Production environment

Login Name:	<input type="text" value="userID"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="County (Local Authority)"/> 


[Forgot your password?](#)

or Contractor (for Brokerages).

Login

Password accepted. Choose your organization and/or program area for this session.

You are in the Production environment

Login Name:	<input type="text" value="userID"/>
Password:	<input type="password" value="....."/>
Organization/Program Area:	<input type="text" value="Brokerage (Contractor)"/> 

[Forgot your password?](#)

- From the left-hand yellow navigational menu, click on **PROVIDER** → **PROVIDER PANEL** to view your agency's provider panel.




- Now in the **Provider Panel Members** page, click on the link "Provider Panel Members" on the page to expand that section to see the panel details.

Provider Panel Members

Provider ID:	****
Record Type:	Organization
Business Type:	Corporation
Business Name:	County
Tax Name:	County

▶ **Provider Panel Member for**

▶ **Provider Panel Members** 

4. Once expanded, users will see the providers currently listed on your panel. These are the providers who will be available for use in eXPRS POC for your agency.

→ **NEW FEATURE as of June 2018:** The primary provider type/specialty for the provider's record is now displayed on the panel. This will hopefully make it easier to identify records to ensure the correct record needed is listed.

Provider Panel Members

Provider ID:
Record Type: Organization
Business Type: Corporation
Business Name: County
Tax Name: County

▶ **Provider Panel Member for**

▼ **Provider Panel Members**

Report options: CSV | Excel | PDF | RTF

SPD ID	eXPRS ID	Provider	Provider Specialty	Start Date	End Date
*****	*****	Provider Name	DD Comprehensive Service Agency	1/1/2018	12/31/9999
*****	*****	Provider Name	DD Personal Support Worker	1/1/2014	12/31/9999
*****	*****	Provider Name	Foster Care - Child DCR	1/1/2018	11/20/2018
*****	*****	Provider Name	DD Personal Support Worker	1/1/2018	12/31/9999
*****	*****	Provider Name	DD Supported Living	8/17/2016	12/31/9999
*****	*****	Provider Name	DD Personal Support Worker	6/22/2016	12/31/9999
*****	*****	Provider Name	DD Non-Medical Transportation Organization	1/1/2018	12/31/9999
*****	*****	Provider Name	Foster Care - Adult DD	1/1/2018	12/31/9999
*****	*****	Provider Name	DD Personal Support Worker	12/2/2016	11/30/2018

[Edit Provider Panel](#) [View Provider](#)

5. To add an Agency or Foster Care provider to your panel, click on the **Edit Provider Panel** button at the bottom of the panel list.

*****	*****	Provider Name	Transportation Organization	1/1/2018	12/31/9999
*****	*****	Provider Name	Foster Care - Adult DD	1/1/2018	12/31/9999
*****	*****	Provider Name	DD Personal Support Worker	12/2/2016	11/30/2018

[Edit Provider Panel](#) [View Provider](#)

- The provider panel list is now open for editing and show a section called **New Provider Panel Member** at the bottom of the page. Use this section to search for and add a provider.

New Provider Panel Member (Enter Provider ID or Search)

SPD Provider ID:

Provider Name:

Dates: —

- If the provider is active and you know their **SPD Provider ID** number, enter it in the corresponding field, enter the dates the provider will be active on your panel, and click **Save Panel Members**.

If you do not know their SPD provider ID number, you can search for the agency provider using the binocs next to the **Provider Name** field.

New Provider Panel Member (Enter Provider ID or Search)

SPD Provider ID:

Provider Name:

Dates: —

- Clicking the binocs will take you to the **Find Provider** page, where you can search for the provider you wish to add. **Be sure to search/add the correct provider record for the service to be authorized.** Many providers have multiple records.
- For AGENCY or Foster Care providers**, enter the provider’s name in the **Last/Business/Tax Name** field, and click **FIND**.
→ **PRO TIP:** Using an asterisk (*) as the first character then the name following will search for records where that name appears anywhere in the record name.

For example: If you search by just entering “community”, then the system will only search records with names that **start exactly** with the word “community”. If you search by entering “*community”,

then the system will search for records that just contain the word “community” anywhere in the record name, not just starting.

Find Provider

At least one search criteria must be entered. Prefix Last Name with * to search for partials.

Record Type:	All except contacts	<input checked="" type="checkbox"/> eXPRS Only	<input type="checkbox"/> Include Inactive
SPD Provider ID:			
eXPRS Provider ID:		<input type="checkbox"/> Include Service Locations	
Last/Business/Tax Name:	*community		
	<input checked="" type="checkbox"/> Last	<input checked="" type="checkbox"/> Business	<input type="checkbox"/> Tax <input type="checkbox"/> Soundex
First Name:			
D.O.B.:			
Provider Type & Specialty:	type to filter dropdown		
	Select...		
Verification Status:	Select...		
Max Displayed:	25		

Find **Reset**

10. From the results list returned, select the record the provider **for the service** they will be authorized.

→ **Please Note** - this can be tricky, as providers can often have multiple provider records.

→ **For Agency Providers:** select the Agency’s service location (child) record for **the type of service** the agency is providing. You may need to add multiple agency records.

→ **For Foster Care Providers:** select the FC provider record for the home/site the individual resides/receives services. If a FC provider has multiple homes, you may need to add each needed record separately.

It is often helpful to include the **provider type/specialty** to the search criteria when searching for records (example shown on the next page).

**** Information on the different provider type/specialties for Agency & Foster Care providers is listed in a table at the end of this assistance guide.**

Find Provider

At least one search criteria must be entered. Prefix Last Name with * to search for partials.

Record Type: All except contacts eXPRS Only Include Inactive

SPD Provider ID:

eXPRS Provider ID: Include Service Locations

Last/Business/Tax Name: *community
 Last Business Tax Soundex

First Name:

D.O.B.:

89-819

Provider Type & Specialty: DD Living Facilities
89-819 DD Community Living Supports

Verification Status:

Max Displayed: All

Find Reset

Export options: CSV | Excel | PDF | RTF

Type	eXPRS Prov ID	SPD Prov ID	Display Name	Prov Type & Specialty	Verification	Beds	Program Start	Program End	Program Status	Primary Email
EXL	*****	*****	Amies Community CLS	DD Living Facilities - DD Community Living Supports	DMAP Number Issued		11/3/2016	12/31/9999	A	
EXL	*****	*****	Assisted Community CLS	DD Living Facilities - DD Community Living Supports	DMAP Number Issued		1/8/2018	12/31/9999	A	

- To add a record, click on the blue **Display Name** hyperlink for the provider record you wish to add. You will be returned to your panel list with that provider's information auto populated.

Providers

New Provider Panel Member (Enter Provider ID or Search)

SPD Provider ID: *****

Provider Name: Amies Community CLS

Dates: 1/1/2018 — 12/31/9999

Save Panel Members View Provider Panel

Enter the date range the provider's record is to be active on your panel in the corresponding **Dates** fields, then click **Save Panel Members** to save this record to your panel. For an ongoing, infinity date range, use 12/31/9999 as the end date.

12. Repeat steps #5 – 11, to add additional Agency records to your panel.

Common Agency & Foster Care provider types/specialties that will likely be used for in-home or community services for Plan of Care are listed below.

This is not an exhaustive list.

Provider Type/Specialty Number	Common Service Type Name
87-732	DD Employment – Facility based services
87-733	DD Employment – Non-Facility based Crew/Enclave services
87-735	DD Employment – Supported Employment
87-738	DD Employment – Community Inclusion services
89-819	DD Community Living Supports – In Home services
89-835	DD Supported Living – residential services
93-710	DD Agency Behavior Consultant
93-942	DD Brokerage Certified Service Agency Provider Org
93-943	DD Comprehensive Services Agency (parent agency record)
72-717	DD Non-Medical Transportation – DD Provider Agency/Org
70-701	Foster Care – Adult DD
70-837	Adult FC – Respite Services
71-703	Foster Care = Child DCR (DD certified)
71-704	Foster Care – Child DCW (CW certified)
71-837	Child FC – Respite Services
78-725	DD Service – APD Adult Day Service Provider
78-930	DD Service – APD In-Home Care Agency Provider