

## How to Access/Use the Provider Status Report in eXPRS

(CDDPs/Brokerages)

*(updated 9/12/16)*

There is a report available in eXPRS to assist CDDP and Brokerage users to track the credential status of their PSW providers listed on their POC Provider Panel. This report contains more detail than the **CHC & PEAA Expire** report, including the provider's emails addresses (provider record and eXPRS user account), the status of their provider record, what credential information they have or is missing, and when the PSW has last accessed eXPRS with their eXPRS User Account.

In addition, the report can be pulled in an Excel file format, so using emails for mass emailing is much easier. See page 8 of this guide for instructions on how to pull using the Excel file format.

CDDP and Brokerage users who have permissions to access the CHC/PEAA Expire report will also have permissions to access to the **Provider Status report**.

### To Access and Use the Provider Status Report:

1. Login in to eXPRS. If users have more than one organization login option, they will need to be logged in under the **Local Authority** (for CDDPs shown below)

**Login**

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

You are in the User Acceptance environment

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

[Forgot your password?](#)

or **Contractor** (for Brokerages) Organization role.

**Login**

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

You are in the User Acceptance environment

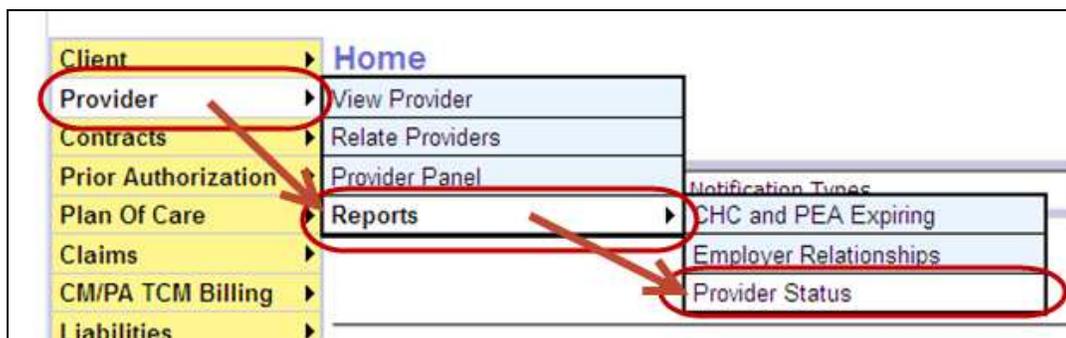
**Login Name:**

**Password:**

**Organization/Program Area:**

[Forgot your password?](#)

2. From the left hand, yellow menu click on **Provider** → **Reports** → **Provider Status**.



3. In the **Provider Status** report search criteria page, enter the criteria needed for the report data desired.
  - A report **End Date** is required and will default to the last day of the current month. Users can change this date, as desired.

The **End Date** is the date the system uses to determine which provider records are considered “Invalid” as of that date.

**For example:** If the **End Date** entered = **10/31/2015**, the report will return as **INVALID** those provider records that have no “approved to work” status as of that date, or their “approved to work” status has or will expire on or before that date. Searching using future end dates will assist in tracking who has credentials that will expire in the near future.

- It is recommended that users also run the report using **Provider Type & Specialty** criteria to get information for a specific type of provider, such as just for the PSW providers from the agency's POC panel. ***\*\*Doing this may require that users run the report more than once.***

The PSW **Provider Type & Specialty for PSWs** are defined as:

- 84-803 = DD PSW Providers
- 84-801 = CIIS PSW Providers
- 84-809 = DD PSW Employment Job Coach

- It's also recommended to also check **Show Valid**, to include all VALID (non-expiring) records for that provider type from your panel in the report as well.

When **Show Valid** is checked, the report will return with data in 2 sections: **Invalid** and then **Valid** records.

**Provider Status**

Shows the name, SPD ID, eXPRS ID, email, type and specialties, user login, and course status of all credential related pieces for all accessible providers. (If Show Valid is selected), then by provider type. Dates will filter what time became invalid. Selecting one or more specialties will also filter respectively to show all accessible providers in another group. Check Show Organizations to show non-type providers in the Valid group, but only if no specialty has been selected.

Start Date:

End Date: 10/31/2015

eXPRS ID:

84-803  
**Personal Support Worker**  
 84-803 DD Personal Support Worker

Provider Type & Specialty:

Show Valid:

Show Organizations and/or Contacts:

Format: HTML

Submit Close

**Callouts:**

- The report will return all **INVALID** records listed on your panel as of this date.
- Search for a specific **Provider Type & Specialty**, and then highlight to select.
- Check the **Show Valid** box to include the **VALID** providers from your panel on the report as well.

4. With the search criteria desired entered click **SUBMIT** to run the report.

5. When the report returns, you will see many columns of provider record detail. The columns/data are defined as shown in the below examples.

**Provider Status**

Name	SPD ID	eXPRS ID	Email	Specialty	ACA or SSA/MF	CHC	PEA	Credential	User Login	EOR
<a href="#">PSW #1 Name</a>		5*****3	email_#1@email.xxx	003		08/31/2014	Missing	Incomplete	8/15/2015	<a href="#">1</a>
<a href="#">PSW #2 Name</a>		1*****9	email_#2@email.xxx	803	Missing	Missing	06/30/2018	Missing	1	<a href="#">2</a>
<a href="#">PSW #3 Name</a>	7 *****1	0*****3	email_#3@email.xxx	003		10/31/2015	09/30/2016	10/31/2015	9/7/2016	<a href="#">1</a>
<a href="#">PSW #4 Name</a>		1*****0	email_#4@email.xxx	803	Missing	Missing	06/30/2018	Missing	1	<a href="#">1</a>
<a href="#">PSW #5 Name</a>		1*****9	email_#5@email.xxx	003	Missing	Missing	06/30/2010	Missing	1	<a href="#">1</a>
<a href="#">PSW #6 Name</a>	7*****2	4*****6	email_#6@email.xxx	803		12/31/2016	06/30/2015	06/30/2015	1	<a href="#">1</a>

**Provider Name Column:** In the HTML format, the provider’s [name](#) is a hyperlink, and will take the user to that provider’s record if clicked.

**Hyperlinks open the provider's record**

Name	SPD ID	eXPRS ID
<a href="#">PSW #1 Name</a>		5*****3
<a href="#">PSW #2 Name</a>		1*****9
<a href="#">PSW #3 Name</a>	7 *****1	8*****3
<a href="#">PSW #4 Name</a>		1*****0
<a href="#">PSW #5 Name</a>		1*****9
<a href="#">PSW #6 Name</a>	7*****2	4*****6

**Provider Email Column:** shows the email from the provider’s credentialed record. Click the email address to show other/additional emails (including from the PSW’s eXPRS user account).

**Provider**

Click to view other emails for PSW.

SPD ID	eXPRS ID	Email
	5*****3	<a href="#">email #1@email.xxx</a>
	1*****9	<a href="#">email #2@email.xxx</a>
7 *****1	8*****3	<a href="#">email #3@email.xxx</a>
	1*****0	<a href="#">email #4@email.xxx</a>
	1*****9	<a href="#">email #5@email.xxx</a>
7*****2	4*****6	<a href="#">email #6@email.xxx</a>

**Email Sub-report:** shows additional emails for PSW.



**Provider E**

For PSW

Type	
User	<a href="#">email from user account@email.xxx</a>
Provider Secondary	
Provider Primary	<a href="#">email #2@email.xxx</a>

**Credential Details Columns:**

Specialty	ACA or SSA/MF	CHC	PEA	Credential	Use
		08/31/2014	Missing	Incomplete	
	Missing	Missing	06/30/2018	Missing	
		10/31/2015	09/30/2016	10/31/2015	
	Missing	Missing	06/30/2018	Missing	
	Missing	Missing	06/30/2018	Missing	
		12/31/2016	06/30/2015	06/30/2015	

For columns, if the field:

**has a date** = the expiration date of that information

**missing** = the date/data is missing from the provider record

**incomplete** = the credential is not finalized and not in "approved to work" status

### Provider's eXPRS User Account Login Details Column

**blank** = no eXPRS user acct  
**1** = has eXPRS user account & login  
**date** = last date logged in

Credential	User Login	EOR
ng Incomplete	8/15/2016	<u>1</u>
18 Missing	1	<u>2</u>
16 10/31/2015	9/7/2016	
18 Missing	1	<u>1</u>
18 Missing	1	<u>1</u>
15 06/30/2015		<u>1</u>

### Provider-Client EOR Link Details Column

**blank** = no Employers  
**a number** = # of client/employers

Credential	User Login	EOR
Incomplete	8/15/2016	<u>1</u>
Missing	1	<u>2</u>
2015	9/7/2016	
Missing	1	<u>1</u>
Missing	1	<u>1</u>
2015		<u>1</u>
	09/20/2016	<u>1</u>

## Pulling the Provider Status report in Excel file format:

1. To get the Provider Status report in an Excel spreadsheet format (for example: so email addresses can be easily used for mass emailing), select **Excel** from the **Format** dropdown in the search criteria page.

**Provider Status**

Shows the name, SPD ID, eXPRS ID, email, type and specialties, user login date, EORs and of course status of all credential related pieces for all accessible providers. Groups by validity (if Show Valid is selected), then by provider type. Dates will filter what time period the provider became invalid. Selecting one or more specialties will also filter respectively. Check Show Valid to show all accessible providers in another group. Check Show Organizations and/or Contacts to show non-type providers in the Valid group, but only if no specialty has been selected.

Start Date:

End Date: 10/31/2015

eXPRS ID:

84-803

Personal Support Worker

84-803 DD Personal Support Worker

Provider Type & Specialty:

Show Valid:

Show Organizations and/or Contacts:

Format: Excel

Excel

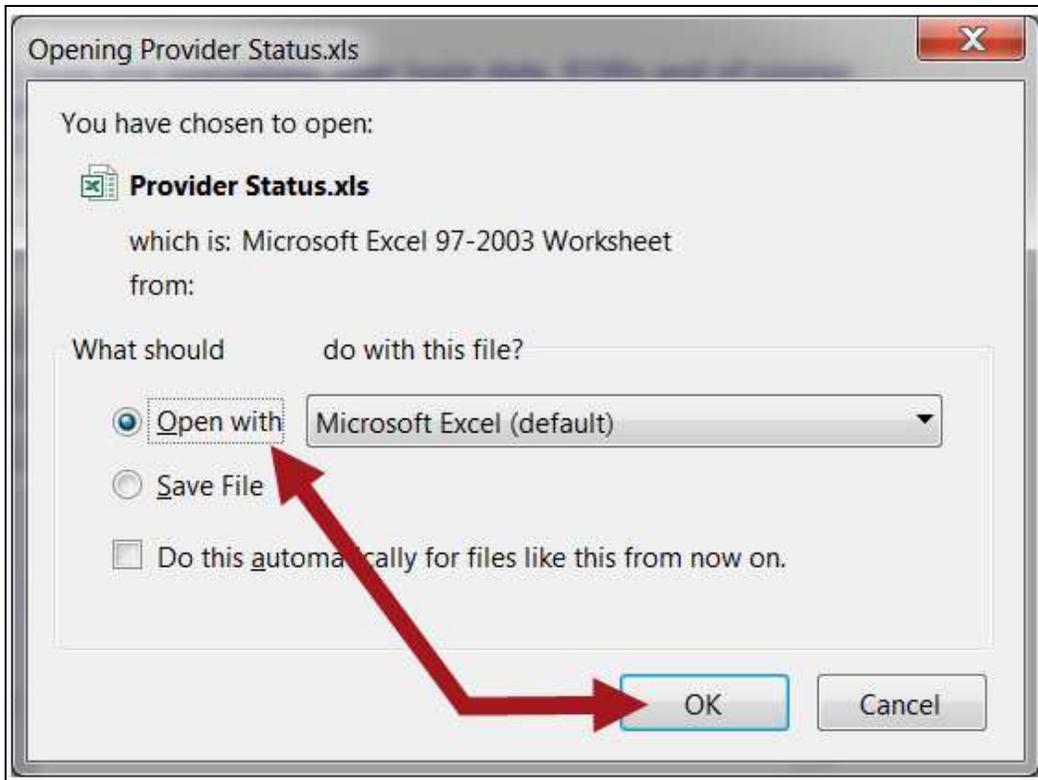
HTML

PDF

RTF/Word

To get this report in an Excel spreadsheet format, select "Excel" from the Format dropdown.

2. After processing, users will receive a pop-up window, asking to open file in an Excel format. Click **OK** to have report data opened in that file format.



3. The report data will then open in the Excel spreadsheet format. Users can save the file, and use the data as they wish.

Name	SPD ID	eXPRS ID	Provider Email(s)	User Email(s)	Type	Specialty	ACA or SSA/MF	CHC	PEA	Credential	User Login	EOR
PSW #1 Name		5****3	email_#1@email.xxx		84	803		08/31/2014	Missing	Incomplete	8/15/2016	1
PSW #2 Name		1*****9	email_#2@email.xxx	email from user account@email.xxx	84	803	Missing	Missing	06/30/2018	Missing	1	2
PSW #3 Name	7****1	8****3	email_#3@email.xxx		84	803		10/31/2015	09/30/2016	10/31/2015	9/7/2016	
PSW #4 Name		1*****0	email_#4@email.xxx		84	803	Missing	Missing	06/30/2018	Missing	1	1
PSW #5 Name		1*****9	email_#5@email.xxx		84	803		Missing	06/30/2018	Missing		1
PSW #6 Name	7****2	4****6	email_#6@email.xxx		84	803		12/31/2016	06/30/2015	06/30/2015		1