

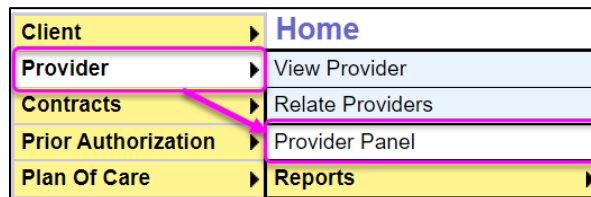
# Adding a Provider Record to a Case Management Entity's Provider Panel

Each Case Management Entity (CME) has a Provider Panel, which is a list of all the providers who can be authorized by that CME in a Plan of Care. The panel list populates the provider dropdown menu for the CME when they create Service Prior Authorizations.

To manage Provider Panel entries, a CME user must have the **Provider Panel Manager** role.

## Adding a Provider to the CME Provider Panel

- 1) Login to eXPRS under the role that allows you to work in the Plan of Care, and select **Provider > Provider Panel**.







- 2) On the **Provider Panel Members** page, click the **Provider Panel Members** section.

**Provider Panel Members**

Provider ID:   
 Record Type: Organization   
 Business Type: Corporation   
 Business Name: CME ONE   
 Tax Name:   
 Business Name: **Historical**

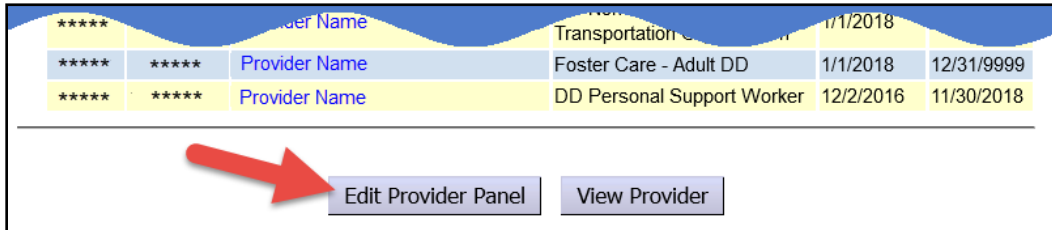
▶ **Provider Panel Member for**

▼ **Provider Panel Members**

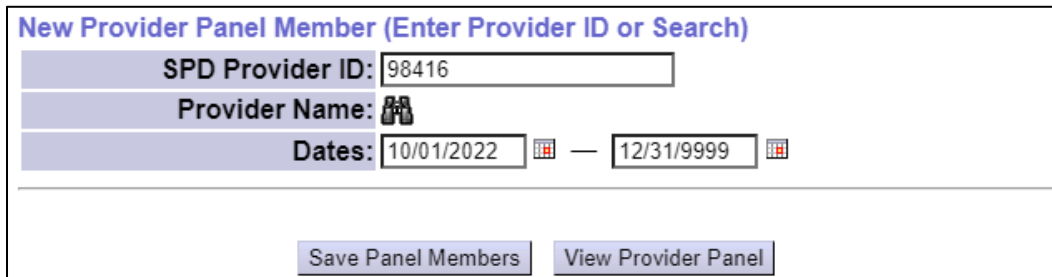
Export options:  CSV |  Excel |  PDF |  RTF

SPD ID	eXPRS ID	Provider	Provider Specialty	Start Date	End Date	Termination
1	65	Provider Name	DD Comprehensive Service Agency	7/1/2018	12/31/9999	
7	12	Provider Name	DD Personal Support Worker	6/19/2017	12/31/9999	
8	18	Provider Name	DD Personal Support Worker	2/9/2017	3/31/2018	
7	67	Provider Name	DD Personal Support Worker	10/1/2016	11/30/2017	

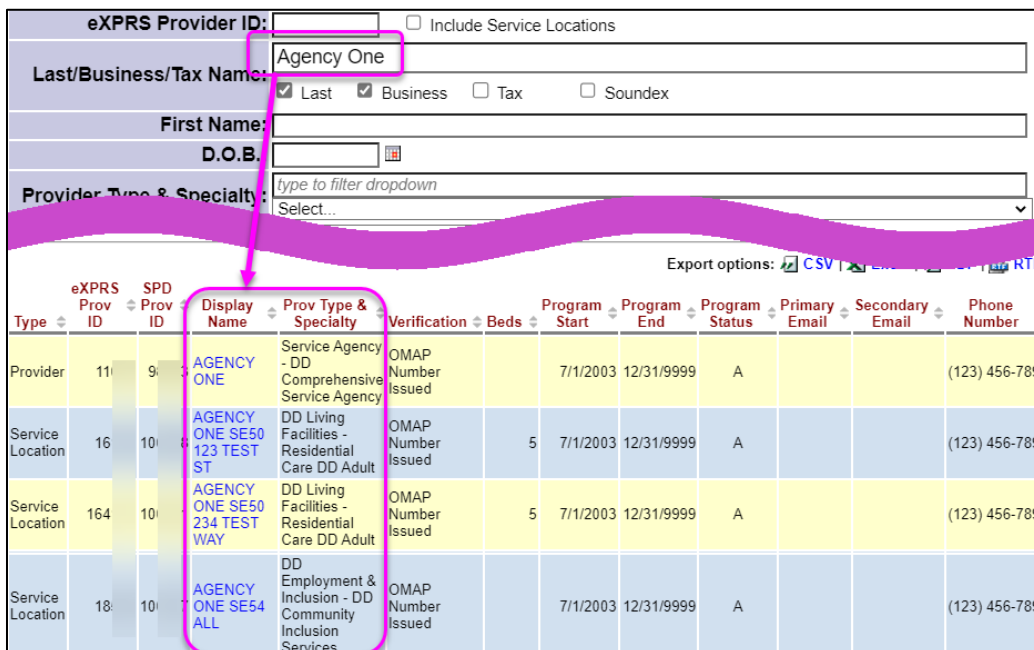
3) To add a Provider, select the **Edit Provider Panel** button at the bottom.



4) In the **New Provider Panel Member** section, enter the **SPD Provider ID** or use the binoculars to search for a provider. Then enter the dates the provider will be active on your panel. For ongoing providers, use 12/31/9999 as the end date.



**Required tip:** Be sure to add the correct provider record for the service being authorized, and that the provider record is credentialed to deliver services in your county! Many providers have multiple records or Residential sites, or may be authorized to only deliver services in a specific county. See **Appendix A** below for more information.



5) Select the **Save Panel Members** button to add the Provider Record to the panel.

## Appendix A: Reminders for adding Supported Living or Employment Providers to a Provider Panel

Service Location records for Supported Living or Employment Services are endorsed and credentialed to provide services only in specific counties. When adding these Service Location records to your CME's Provider Panel, remember to confirm that the provider is credentialed to deliver services in your CME's County. You can check this by:

- 1) Search for the Supported Living or Employment Service Location record and open it.
- 2) Open the **Credentials > County Limits** section.

**View Provider**

Provider ID:  
Record Type:  
Business Type:  
Business Name:  
Tax Name:

▶ Contact Information

▶ Specialties

▼ Credentials

SPD Provider ID:  
Application Date:  
Verification:  
IRS Verified:  
OIG Verified:  
SAM Verified:  
DMF Verified:

▼ Program - SPDST - SPD DD Provider

Enrollment Status	Program Status	Start	End
Active	Active	1/11/2021	12/31/9999

738 - DD Community Inclusion Services  
732 - DD Facility Based Employment  
733 - DD Non-facility Based Employment Crew/Enclave  
735 - DD Supported Employment

Type	Status	Start	End
▶ DD Employment & Community Inclusion	Approved To Work	1/11/2021	1/11/2024
▶ DD Employment & Community Inclusion	Approved To Work	1/11/2021	1/11/2024
▶ DD Employment & Community Inclusion	Approved To Work	1/11/2021	1/11/2024
▶ DD Employment & Community Inclusion	Approved To Work	1/11/2021	1/11/2024

▼ County Limits

County	Dates
Crook	3/12/2021 — 12/31/9999
Jefferson	3/12/2021 — 12/31/9999
Klamath	3/12/2021 — 12/31/9999

As shown here, DD Licensing has endorsed this provider to deliver services only in Crook, Jefferson, and Klamath County. They should only be added to the Provider Panel of CMEs serving those geographic areas.

## Appendix B: Reminders for adding entries to the Provider Panel

It is not necessary to add the same provider record to the panel multiple times (e.g. For PSWs to align with their credential date ranges).

SPD ID	eXPRS ID	Provider	Role	Start Date	End Date	Action
8****8	4*****0	Provider 1	DD Personal Support Worker	7/1/2021	12/31/9999	Edit
7****0	4*****6	Provider 2	DD Personal Support Worker	7/1/2021	12/31/9999	Edit
8****6	1*****8	Provider 3	DD Personal Support Worker	7/1/2021	11/30/2021	Edit
8****6	1*****8	Provider 3	DD Personal Support Worker	12/1/2021	11/30/2023	Edit
7****7	1*****6	Provider 4	DD Personal Support Worker	7/1/2021	12/31/9999	Edit

*Note: A red callout bubble with the text "This is unnecessary." points to the second record for Provider 3, which has overlapping start and end dates with the first record for Provider 3.*

eXPRS will give an error when the same provider record is added to the panel with overlapping start & end dates. If the same provider record is listed on the panel with overlapping panel date ranges, one of those records should be removed.

## Appendix C: Common provider types and specialties

<b>Provider Type/Specialty Number</b>	<b>Common Service Type Name</b>
87-732	DD Facility Based Employment
87-733	DD Non-Facility Employment Crew/Enclave
87-735	DD Supported Employment
87-738	DD Community Inclusion Services
89-707	Residential Care Facility – Host Homes
89-819	DD Community Living Supports (CLS) - Employer Agency
89-821	DD Community Living Supports (CLS) - Standard Agency
89-835	Supported Living DD
89-825	Residential Care DD Adult GH
89-826	Residential Care DD Child GH
70-701	Foster Care – Adult DD
71-703	Foster Care – Child DCR
71-704	Foster Care – Child DCW
93-710	DD Agency Behavior Consultant
72-717	DD Non-Medical Transportation – DD Provider Agency/Org
70-837	Adult FC Respite/Relief Care Svcs
71-837	Child FC Respite/Relief Care Svcs
78-725	DD Service – APD Adult Day Service Provider
78-930	DD Service – APD In-Home Care Agency Provider
93-943	DD Comprehensive Service Agency