

How to Add a PSW or Other Individual 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. The provider panel is a list of the 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 a PSW or other Individual provider 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**

Export 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 Home	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

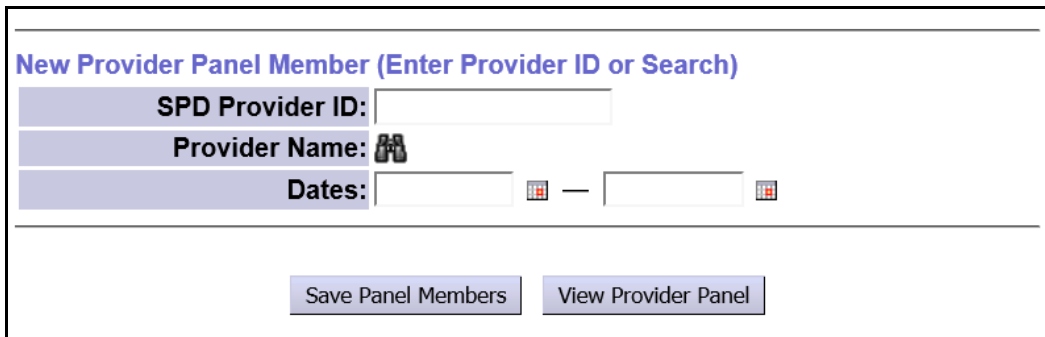
[Edit Provider Panel](#) [View Provider](#)

5. To add an PSW or other individual 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](#)

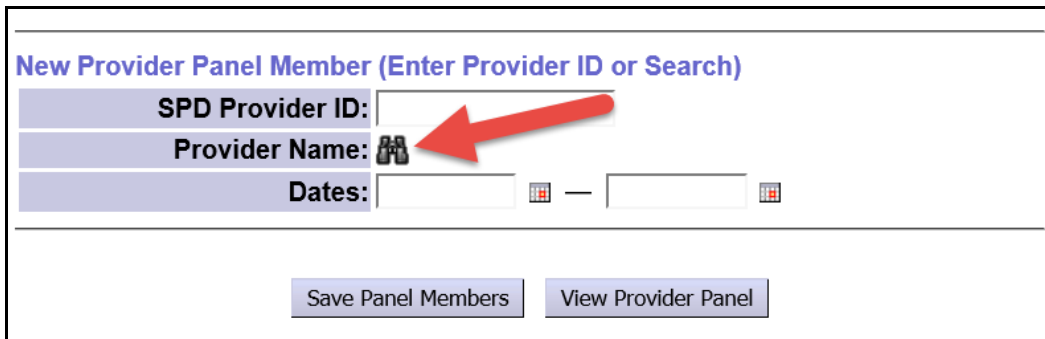
- The **New Provider Panel Member** section will open at the bottom of the page. Use this section to search for and add a provider.



The screenshot shows a form titled "New Provider Panel Member (Enter Provider ID or Search)". It contains three input fields: "SPD Provider ID:" with a text box, "Provider Name:" with a text box and a binoculars icon, and "Dates:" with two date pickers separated by a minus sign. Below the form are two buttons: "Save Panel Members" and "View Provider Panel".

- If you know their **SPD Provider ID** number, you may 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 provider using the binocs next to the **Provider Name** field.



This screenshot is identical to the one above, but a red arrow points to the binoculars icon next to the "Provider Name" field, highlighting it as the search tool.

- 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.
- In the **Find Provider** page, enter the provider's **Last Name** and **First Name** in the corresponding fields, and click **FIND** to search.

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: Last Last Business Tax Soundex

First Name: First

D.O.B.:

Provider Type & Specialty: type to filter dropdown
Select...

Verification Status: Select...

Max Displayed: 25

10. From the results list (if any returned), click on the blue **Display Name** for the provider you wish to add to your panel.

Verification Status: Select...
Max Displayed: 25

Export options:

Type	eXPRS Prov ID	SPD Prov ID	Display Name	Prov Type & Specialty	Verification	Beds	Program Start	Program End	Program Status	Primary Email
EXP	12****9	7****0	Last, First A	Personal Support Worker - DD Personal Support Worker	OMAP Number Issued		3/2/2016	12/31/9999	A	

→ WARNING – SELECT RECORDS CAREFULLY!!

Some individual providers will have multiple records. Review the the **Provider Type/Specialty** listed & the **Prov ID** numbers for the providers in the results list to sure you are selecting the correct record needed.

**** Information on the different provider type/specialties is listed in a table at the end of this assistance guide.**

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

New Provider Panel Member (Enter Provider ID or Search)

SPD Provider ID: 79***0

Provider Name: Last, First A

Dates: 1/1/2018 — 12/31/9999

Save Panel Members View Provider Panel

Enter the date range the provider 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 – 12, to add additional PSW or other individual providers, such as Behavior Consultants to your panel.
13. You may also search for and add agency provider records as well (such as a DD supported living or employment agency), if needed. Please see the assistance guide [How to Add Agency & Foster Care Providers to POC Provider Panel](#) for specific instructions.

DD PSW & other Individual Provider Provider Type/Specialty Code List

Provider Type/Specialty Number	Official Provider Type/Specialty Name	Common Name
84-800	Personal Support Worker – In-Home Personal Care Attendant DD	DD SPPC/PC20 PSW
84-801	Personal Support Worker – In-Home Personal Care Attendant CIIS	DD CIIS PSW
84-803	Personal Support Worker – DD Personal Support Worker	DD PSW (fka: domestic employees)
84-809	Personal Support Worker – DD PSW Employment Job Coach	DD PSW Job Coach
74-749	Client Support Services, Commercial – DD Employment Development/Discover Specialist (<i>new</i>)	DD Employment/Discovery Specialist
83-710	Behavioral Consultant – Behavioral Consultant	Behavior Consultant

→ **Please note:** that a separate SPD Provider ID number must be assigned for different provider TYPES (the first 2-digit code).

For example: A provider can have records for both type/specialty of **84-803** and **74-749**, but will have a separate SPD provider ID number for each, since they are different provider types - first 2-digit code numbers are different.