



# Resource – Access and View Provider Details Job Aid



## User

- Resource Worker.
- Resource workers with internal profiles of DCW Provider Read-Only and CW Provider Read-Only will have read only access to the Provider Details.

## Process

This Job Aid table describes the actions needed to search for a provider and view the Provider Details for a selected provider.

Refer to the Job Aids listed below for details on completing the individual sections contained in the Provider Details page:

- *TM Resource: Manage Individual/Family Provider Summary*
- *TM Resource: Manage Agency/Facility Provider Summary*
- *TM Resource: Manage Provider Household Members*
- *TM Resource: Manage Provider Agency/Facility Representatives*
- *TM Resource: Manage Provider Inquiries*
- *TM Resource: Manage Provider Services*
- *TM Resource: Manage Provider Certifications, Licenses, and Approvals*
- *TM Resource: Manage Provider Contacts/Visits, Notes, and Frameworks*
- *TM Resource: Manage Provider Incidents*
- *TM Resource: Manage Provider Referrals*
- *TM Resource: Manage Provider Placements*
- *TM Resource: Manage Provider Rates*
- *TM Resource: Manage Provider Contracts*

## Introduction

- The Provider Details page will be editable for certain profiles and read-only for other profiles.

## Table of Contents

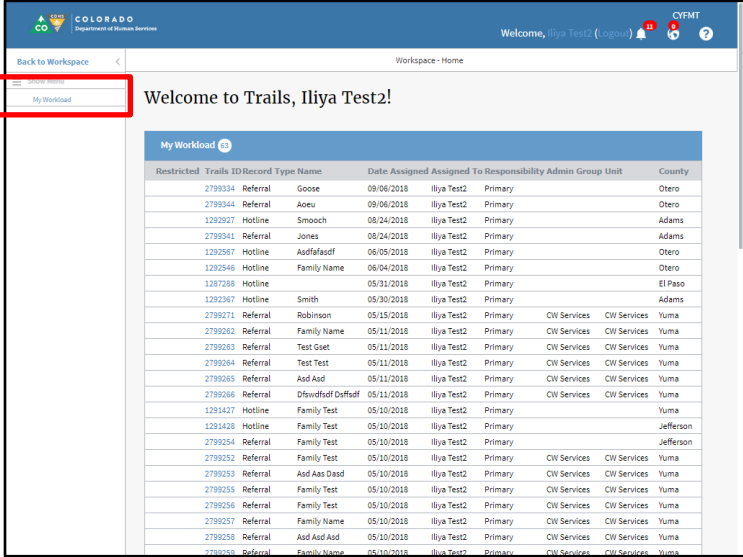
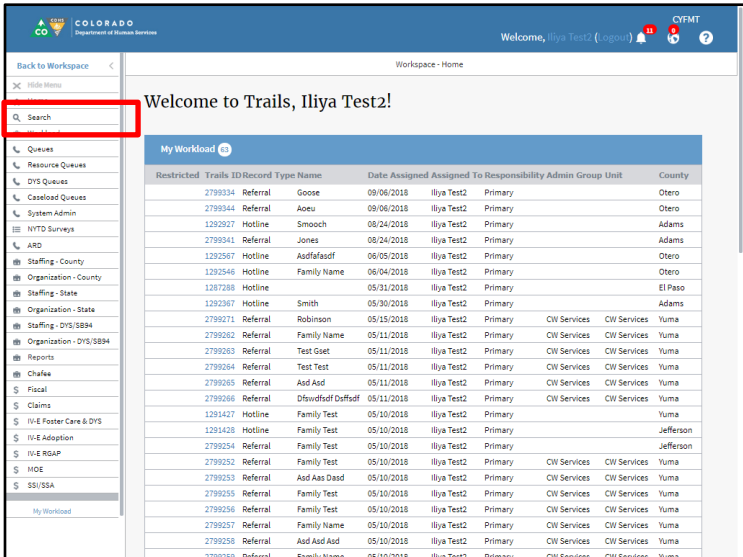
Provider Search ..... 2



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## Provider Search

Steps/Output	Screenshot
<p>In the <i>Left Navigation</i> panel.</p> <ol style="list-style-type: none"> <li>Click <b>Show Menu</b>.</li> </ol> <p>This expands the <i>Left Navigation</i> panel.</p> <p><b>Note:</b> The menu items displayed in the <i>Left Navigation</i> panel are dependent upon your security profile.</p>	 <p>The screenshot shows the user interface for 'Trails, Iliya Test2!'. The left navigation panel is expanded, and the 'Show Menu' button is highlighted with a red box. The main content area displays a 'My Workload' table with columns: Restricted, Trails ID, Record Type, Name, Date Assigned, Assigned To, Responsibility, Admin Group, Unit, and County. The table contains 20 rows of data.</p>
<p>In the <i>Left Navigation</i> panel.</p> <ol style="list-style-type: none"> <li>Click the <b>Search</b> menu item.</li> <li>Click the <b>Provider Search</b> menu item.</li> </ol>	 <p>The screenshot shows the same user interface as the previous one, but the 'Search' menu item is highlighted with a red box. The 'Provider Search' menu item is also visible in the expanded left navigation panel. The main content area remains the same, displaying the 'My Workload' table.</p>



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The *Provider Search* page displays.

In the *Search Queries* section:

4. Click in the **Provider ID** field.
5. Enter the **Provider ID** or other identifying information for the provider.

The screenshot shows the 'Provider Search' interface. The 'Search Queries' section contains several input fields: 'Provider Name' (with a sub-field 'Enter Name'), 'Address' (with '123 Elm st'), 'City' (with 'Denver'), 'ZIP' (with '80132'), 'Provider ID' (with '555555'), and 'Provider Phone Number' (with '555-555-5555'). There are also toggle switches for 'Soundex' and 'Exact Name Matching', both currently set to 'Off'. At the bottom of the search section are 'Clear' and 'Search' buttons. A red rectangular box highlights the 'Provider ID' input field.

6. Click **Search**.

This screenshot is identical to the one above, showing the 'Provider Search' interface with the same search criteria. In this view, a red rectangular box highlights the 'Search' button at the bottom of the search section.

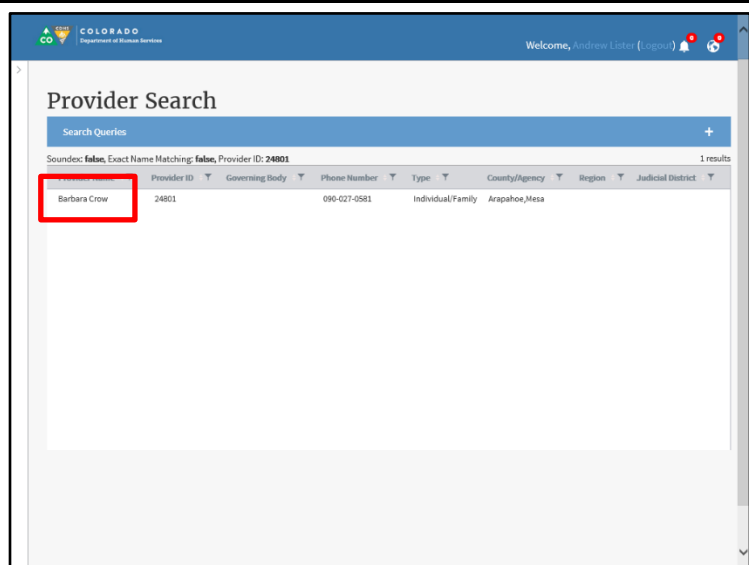


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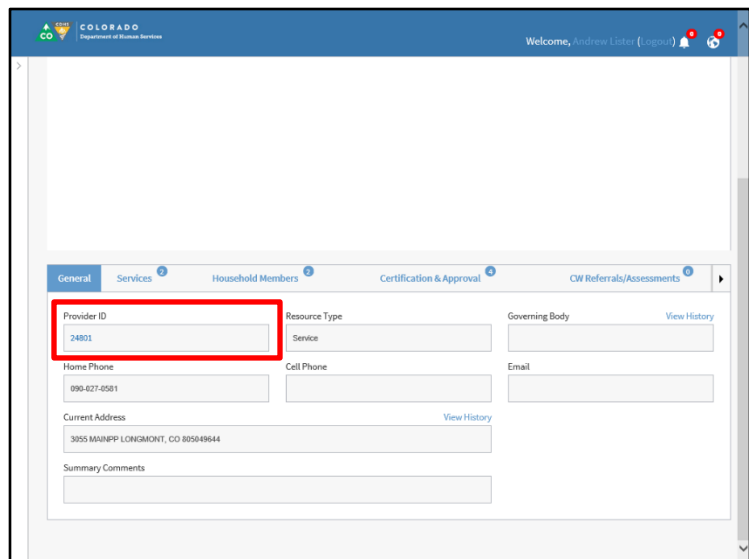
The filtered *Search Queries* list displays.

7. Click the **Provider Name** to display the *Provider Details Tabs*.



The *Provider Details Tabs* display below the *Search Queries* list.

8. In the *General Tab*, click the **Provider ID** link in the *Provider ID* field.





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The *Provider Details* page displays.

Phone Type	Country Code	Phone Number	Phone Ext.	Start Date	Household Member	Primary (Y/N)
Home Phone Number		970-535-0240		03/24/1998		Y
Home Phone		980-927-0081		03/24/1998		N

In the *Provider Details* page:

9. Navigate through the *Provider Details* page by clicking the links in the left navigation panel or using the scroll bar at the right of the page.

**Note:** Refer to the Job Aids listed in the **Process** section on Page 1, for information on the individual sections contained in the *Provider Details* page.

Phone Type	Country Code	Phone Number	Phone Ext.	Start Date	Household Member	Primary (Y/N)
Home Phone Number		970-535-0240		03/24/1998		Y
Home Phone		980-927-0081		03/24/1998		N