



# Resource – Access & View Provider Certifications, Licenses and Approvals Job Aid



## User

- Resource Worker.

## Process

This Job Aid table describes the actions needed to access and view the Approval records for the Service(s) added to the selected Provider.

## **Related Job Aids:**

- *TM Resource: Access and View Provider Details*
- *TM Resource: Manage Provider Service Approvals*

## Introduction

- There will be a list of all Approval records for all Services for the Provider, with the default sort by Pending, then Open, then Closed, and then most recent Date Initiated.
- You will be able to filter the list of Approval records by **Service Type** (with the default being All), **Service Category** (with the default being All), and **Approval Status** (with the default being Open and Pending).

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## Access & View Service Approvals

Steps/Output	Screenshot																					
<p>Refer to the <i>TM Resource: Provider Details – Access and View Provider Details Job Aid</i> for details on locating the desired Provider.</p> <ol style="list-style-type: none"> <li>Navigate to the <i>Certifications, Licenses, Approvals</i> page by clicking the links in the left navigation panel or using the scroll bar at the right of the page.</li> </ol>																						
<p>In the <i>Certifications / Licenses / Approvals</i> section:</p> <ul style="list-style-type: none"> <li>The total number of Approval records in the list displays in the header banner.</li> </ul>	<table border="1"> <thead> <tr> <th>Date Initiated</th> <th>Service Category</th> <th>Service Type</th> <th>Approval Status</th> <th>County/Agency</th> <th>Approval Type</th> <th>License</th> </tr> </thead> <tbody> <tr> <td>10/14/2019</td> <td>Out of Home</td> <td>Secured Residential Treatment Center</td> <td>Pending</td> <td>DCW Placement Services</td> <td>License</td> <td>Permi</td> </tr> <tr> <td>3/15/2019</td> <td>Out of Home</td> <td>Secured Residential Treatment Center</td> <td>Open</td> <td>DCW Placement Services</td> <td>License</td> <td>Permi</td> </tr> </tbody> </table>	Date Initiated	Service Category	Service Type	Approval Status	County/Agency	Approval Type	License	10/14/2019	Out of Home	Secured Residential Treatment Center	Pending	DCW Placement Services	License	Permi	3/15/2019	Out of Home	Secured Residential Treatment Center	Open	DCW Placement Services	License	Permi
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To filter the list in the table by the *Service Category*, *Service Type*, and/or *Approval Status*:

- Use the drop-down arrows and select the appropriate option(s) from the lists.

**Note:** The *Service Category*, *Service Type*, and *Approval Status* filters are multi-select fields, so more than one choice for each can be selected.

The screenshot shows the top of a web application interface. At the top, there is a header 'Certifications/Licenses/Approvals' with a search icon and an 'Actions' dropdown. Below the header are three filter fields: 'Service Category', 'Service Type', and 'Approval Status'. Each field has a multi-select dropdown menu with a funnel icon and a '1' indicator. The 'Approval Status' field also has 'Open X' and 'Pending X' buttons. Below the filters is a table with columns: Date Initiated, Service Category, Service Type, Approval Status, County/Agency, Approval Type, and License. Two rows of data are visible.

Date Initiated	Service Category	Service Type	Approval Status	County/Agency	Approval Type	License
10/14/2019	Out of Home	Secured Residential Treatment Center	Pending	DCW Placement Services	License	Permane
3/15/2019	Out of Home	Secured Residential Treatment Center	Open	DCW Placement Services	License	Permane

To sort and filter by the table columns:

- Use the double-headed arrow and funnel icons to the right of each column heading to sort or filter the list respectively.

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

This screenshot is similar to the one above but highlights the column headers of the table. The 'Date Initiated' column has a double-headed arrow icon, and the other columns have funnel icons. The table data is the same as in the previous screenshot.

Date Initiated	Service Category	Service Type	Approval Status	County/Agency	Approval Type	License
10/14/2019	Out of Home	Secured Residential Treatment Center	Pending	DCW Placement Services	License	Permane
3/15/2019	Out of Home	Secured Residential Treatment Center	Open	DCW Placement Services	License	Permane