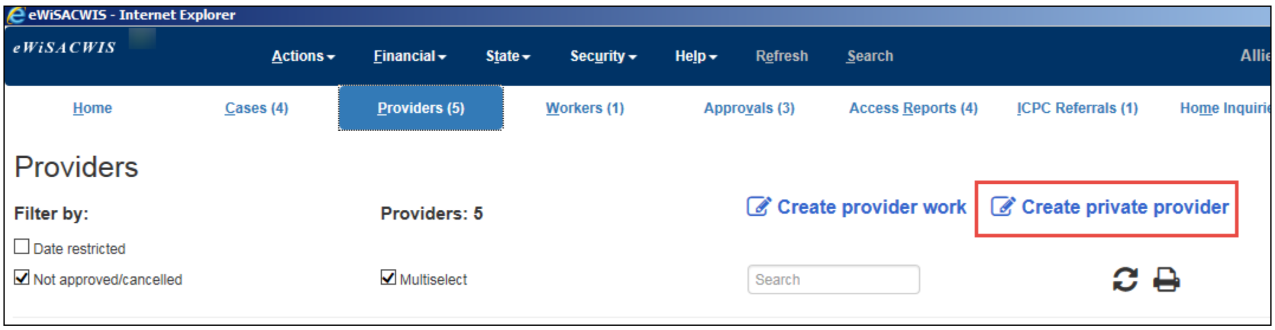
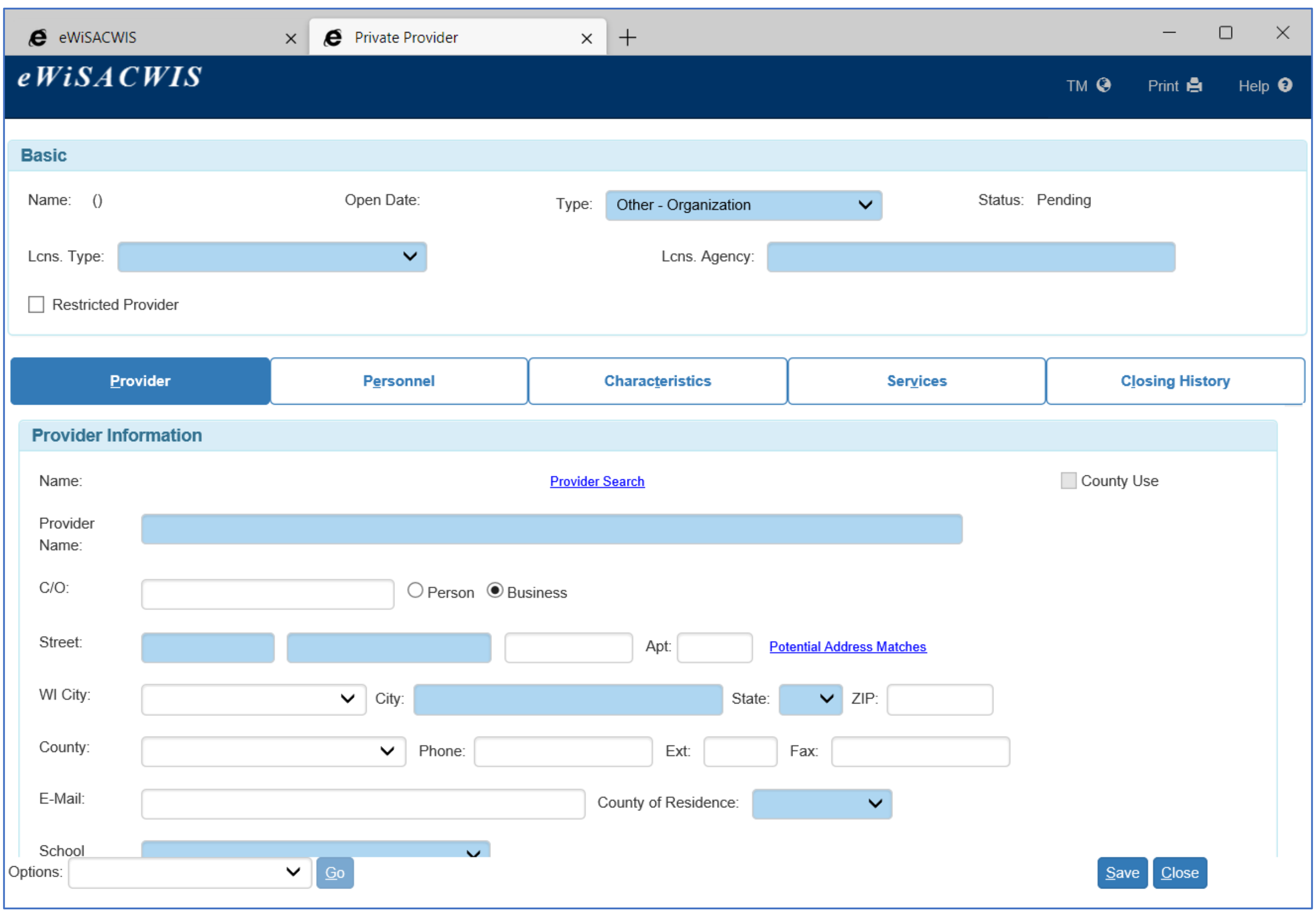
Creating and Maintaining a Private Provider

Note: Private Provider records for in and out of state group homes, residential care centers, child placing agencies, and shelters are created and maintained by State provider contacts. For all other private provider records and out of state facilities, send an email to CBCProject@wisconsin.gov to have the provider created. For out-of-state facilities please include the facility name, the license, the FEIN (Federal Employer Identification Number), and a contact for the facility. For all other private providers, include the name and address of the provider.

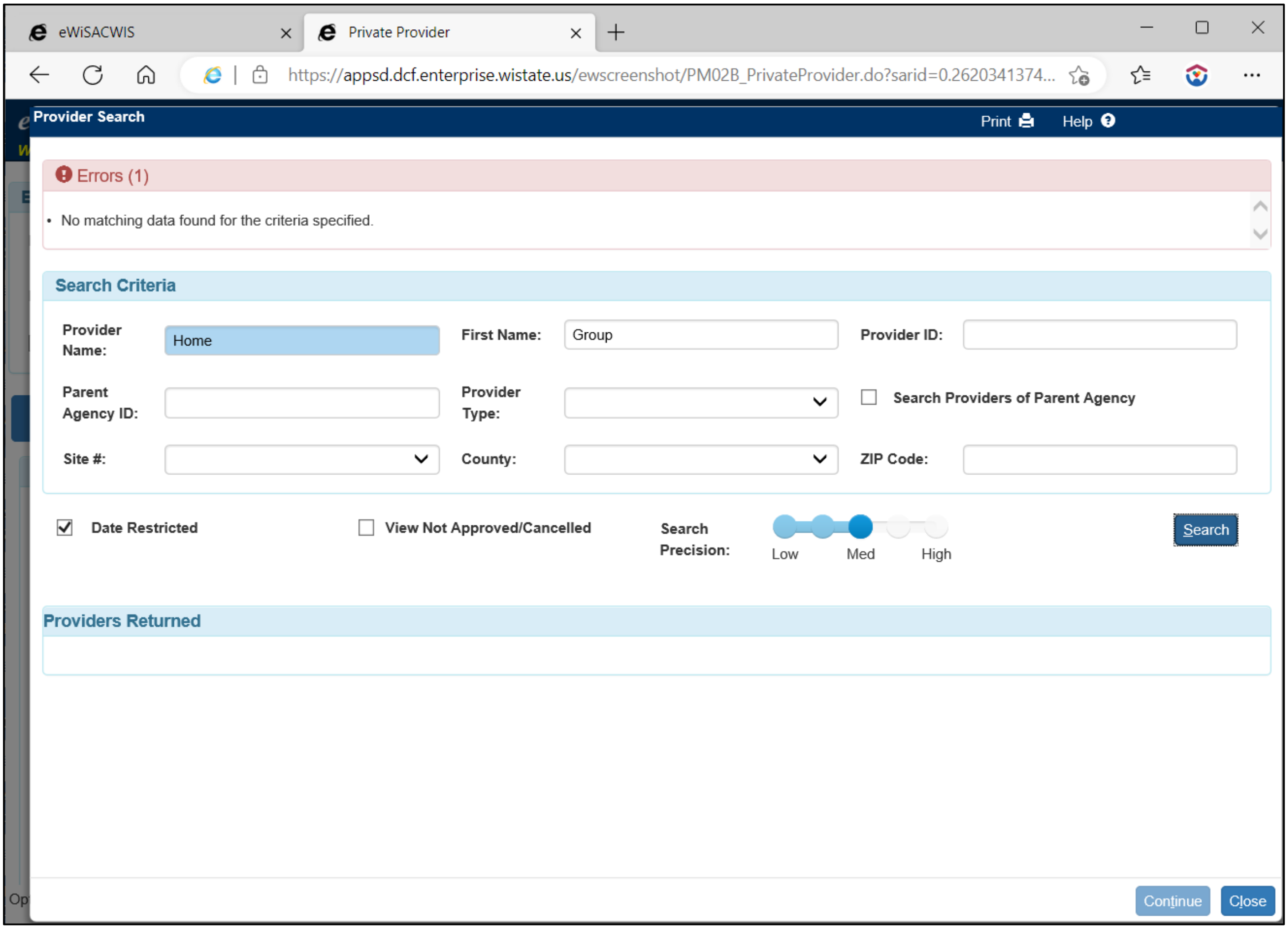
1. From the desktop, go up to the Provider tab and click on the **Create private provider** hyperlink



2. This will open the Private Provider page.



3. From the Type drop-down, select the applicable option. Select an option from the Lcns. Type drop-down and enter the Lcns. Agency. Depending upon the Type option chosen, there will be either a Provider Search or Person Search hyperlink. Click the associated search hyperlink.



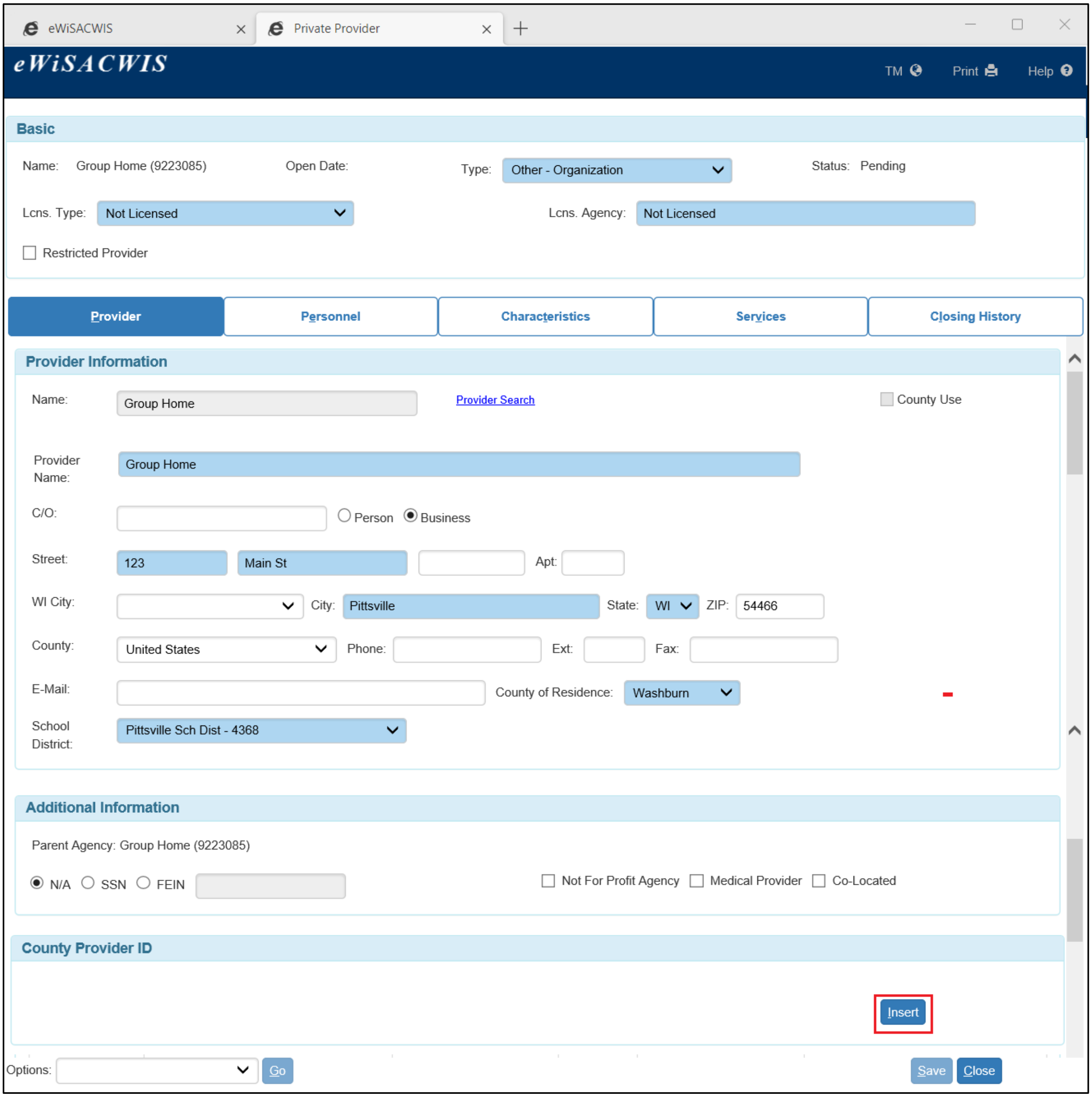
4. On the Provider Search page, enter the name of the provider and click Search. When the provider is not returned, click the Close button on the Provider Search page to return the provider's name to the Private Provider page.

> **Note:** If the provider is returned, then the provider record already exists. Select the radio button for the returned provider and click Continue. If the provider is not returned, click the Close button and return to the Private Provider page. The Name and Provider Name fields will pre-fill with the searched name.

> **Note:** If the provider is an individual, the Person Search page will appear. If the person is returned, click the radio button for the person and click Continue. If the person is not returned, click the Create button to create the person.

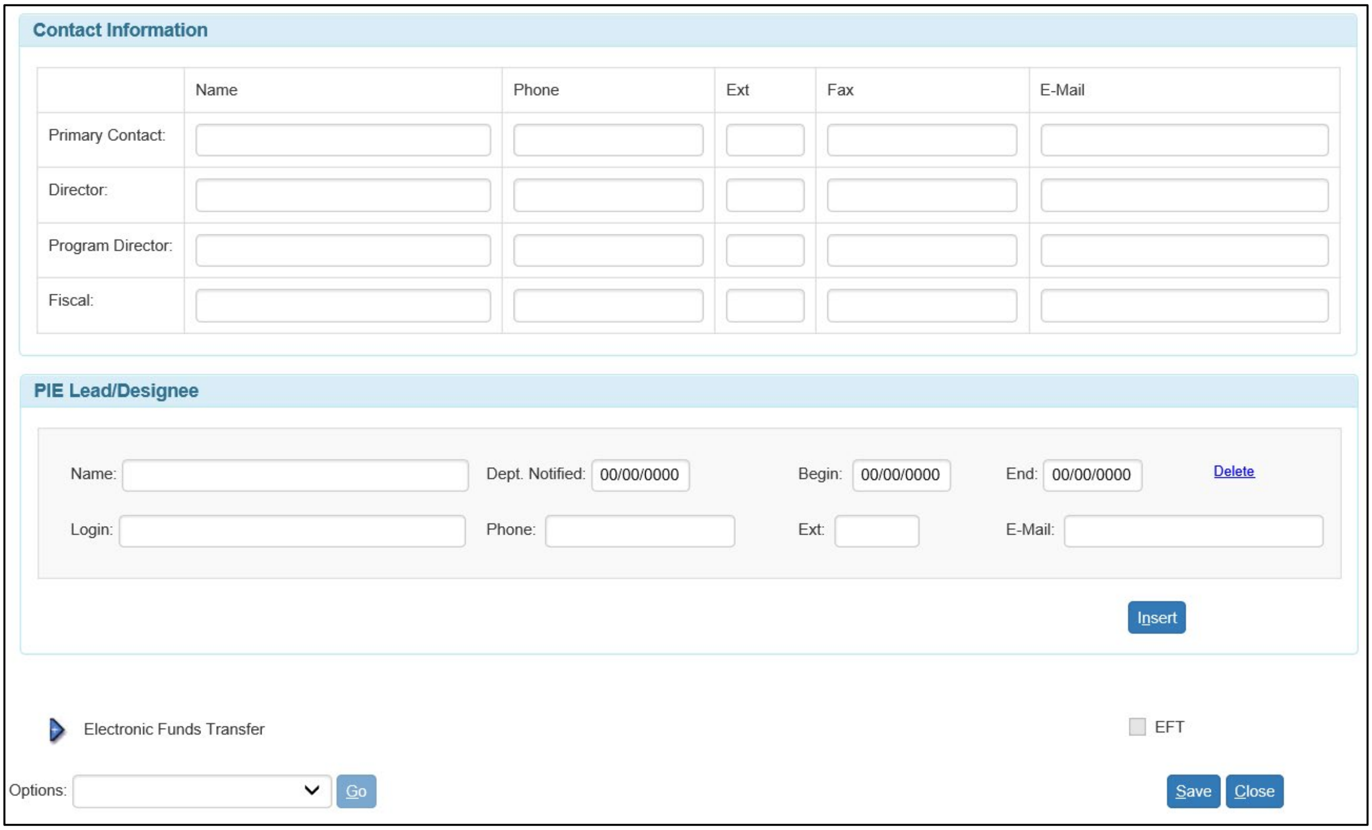
5. On the Private Provider page, add the address, phone, e-mail, county of residence, and School District information.

6. In the Additional Information group box, add the SSN or FEIN, if applicable. Select the applicable checkboxes for nonprofit agency, medical provider, or a co-located facility (for detention and shelter facilities that are located in the same building).
   Note: Checkboxes displayed can be different based on the Type selected in the Basic group box.
7. The County Provider ID group box allows you to enter your internal provider number by selecting the Insert button which is enabled after the initial save. Enter your internal provider ID in the Provider ID field. The Check Display field defaults the name of the provider but can be updated. The Delete hyperlink allows you to delete the county provider name and ID.



8. The Contact Information group box is user entered. Enter any applicable information.

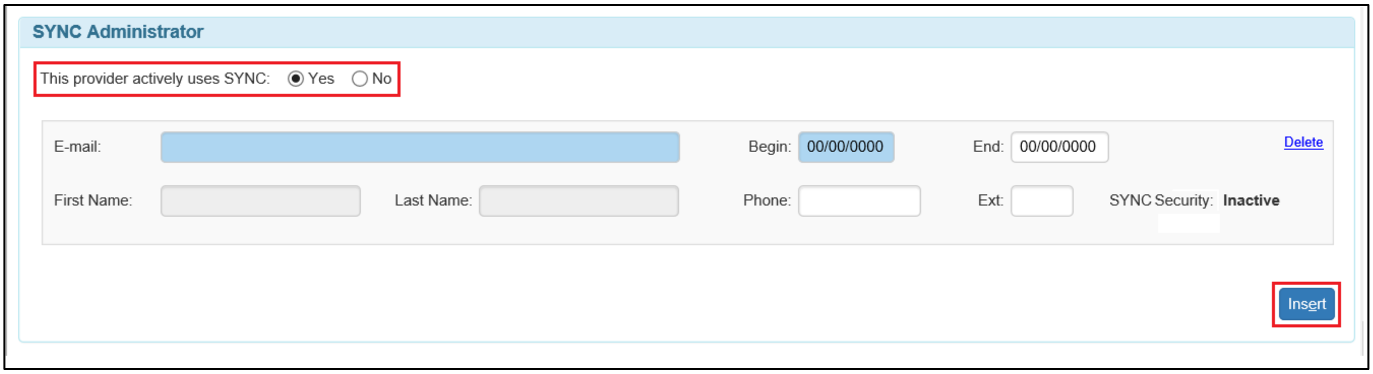
9. The PIE Lead/Designee group box is used by the Child Welfare Licensing Section to document information for child placing agencies, group homes, residential care centers, and shelters. The Electronic Funds Transfer expando is not available for county use at this time.



10. The SYNC Administrator group box is used to document a SYNC Administrator for the Congregate Care Provider or Child Placing Agency and controls whether SYNC users have access to eWiSACWIS child specific information. Selecting the ‘Yes’ radio button enables the Insert button allowing user to document an administrator. Once the page is saved, the SYNC Administrator should have access to their location within the SYNC portal. They can assign users with various roles to receive and respond to referrals. At anytime a SYNC Administrator can have their access revoked individually by entering an End Date on the row with the SYNC Administrator and saving the page.

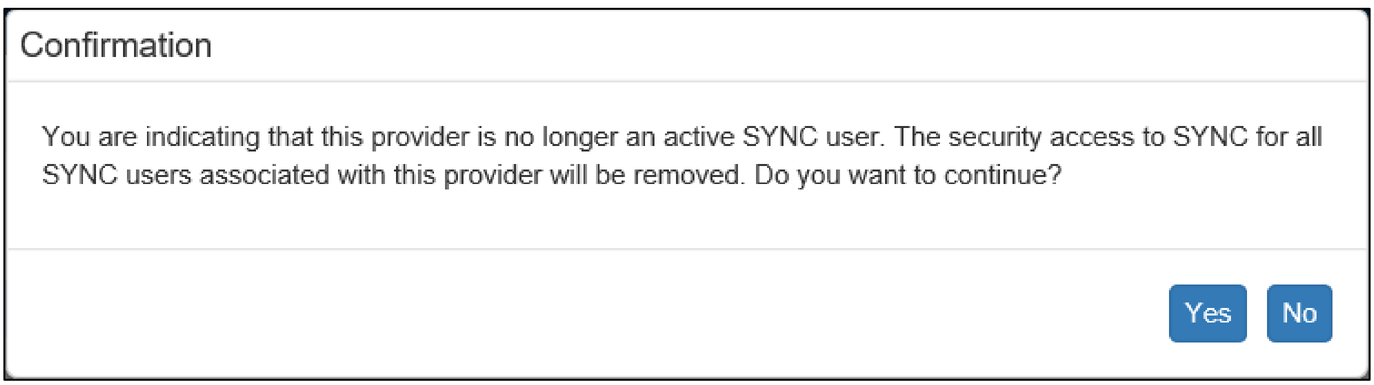
11. For Congregate Care providers, this also allow the use of the ‘Share Documents with SYNC’ option from the provider’s open Out of Home placement(s) to search and select specific documents and/or images from the Document Sharing page to be shared with the Congregate Care Provider.

    Note: the ‘Share Documents with SYNC’ option also displays on closed placements if the system date is within 14 days from the placement ending approval date. See the SYNC user guide for additional information.



12. When a Private Provider closes, it is important to deactivate the SYNC access for the provider. This will also revoke all SYNC Administrator(s) access as well. To do this, switch the radio button for the question “This provider actively uses SYNC” from Yes to No and today’s date is entered automatically into the ‘End’ date field for all active SYNC Administrators, then save the page.

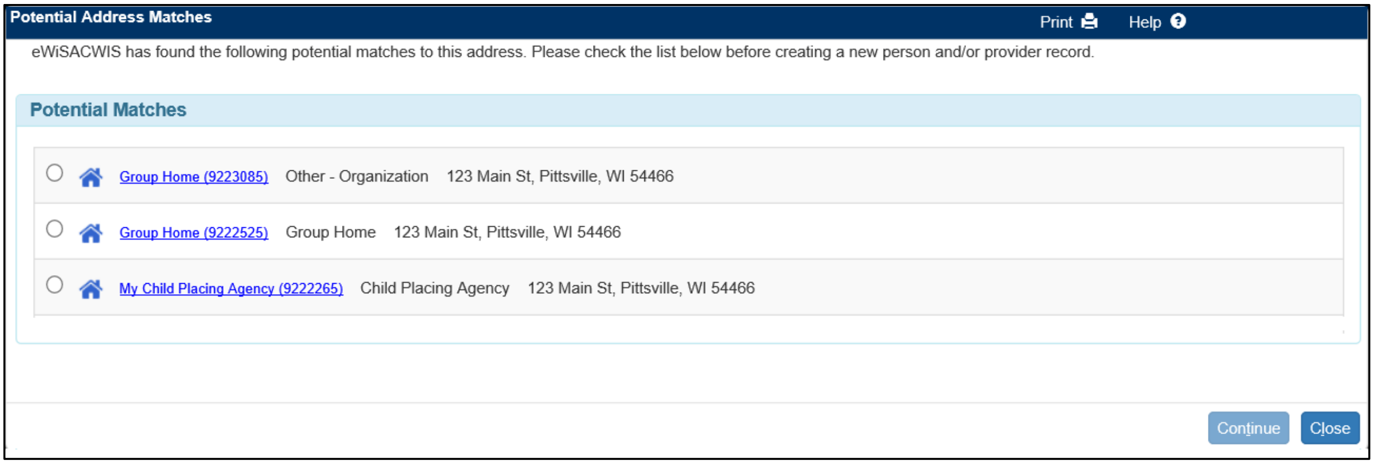
13. Note: changing the Yes selection to No displays the following pop up:



14. Select Yes to continue to deactivate the access to SYNC. Within 5 minutes, all former SYNC users for that provider will also have their access removed. OHC Placement Referrals will no longer be able to be made to this specific provider.

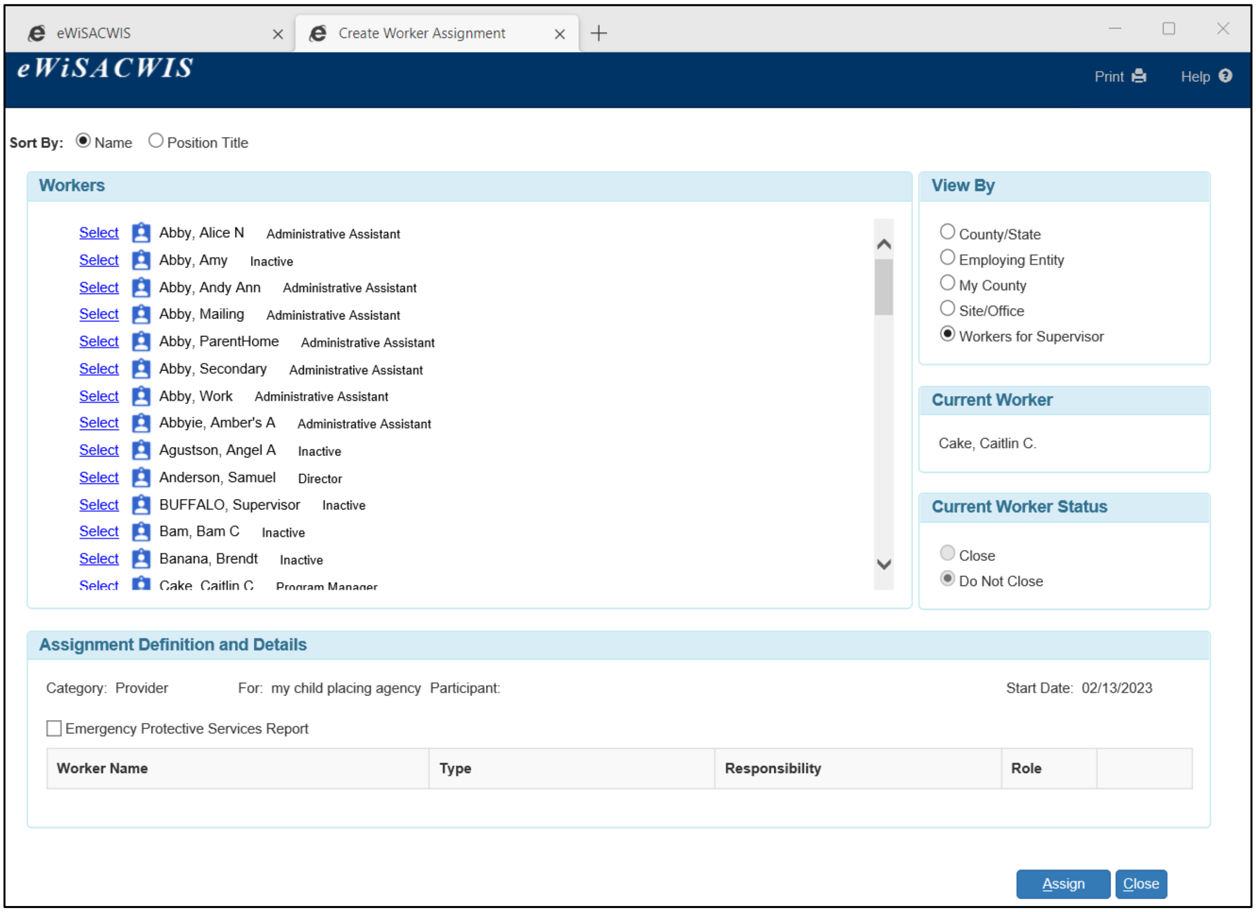
15. Under the Options drop-down, is the ability to maintain the Parent Agency History and Provider Repayment Method. Select Provider Repayment Method from the Options drop-down and click Go to open the page.

16. On Save, a potential match of address will occur. Worker may or may not be presented with a Potential Address Matches page if a provider (or person) record already exists that matches the address you entered on the Provider tab.

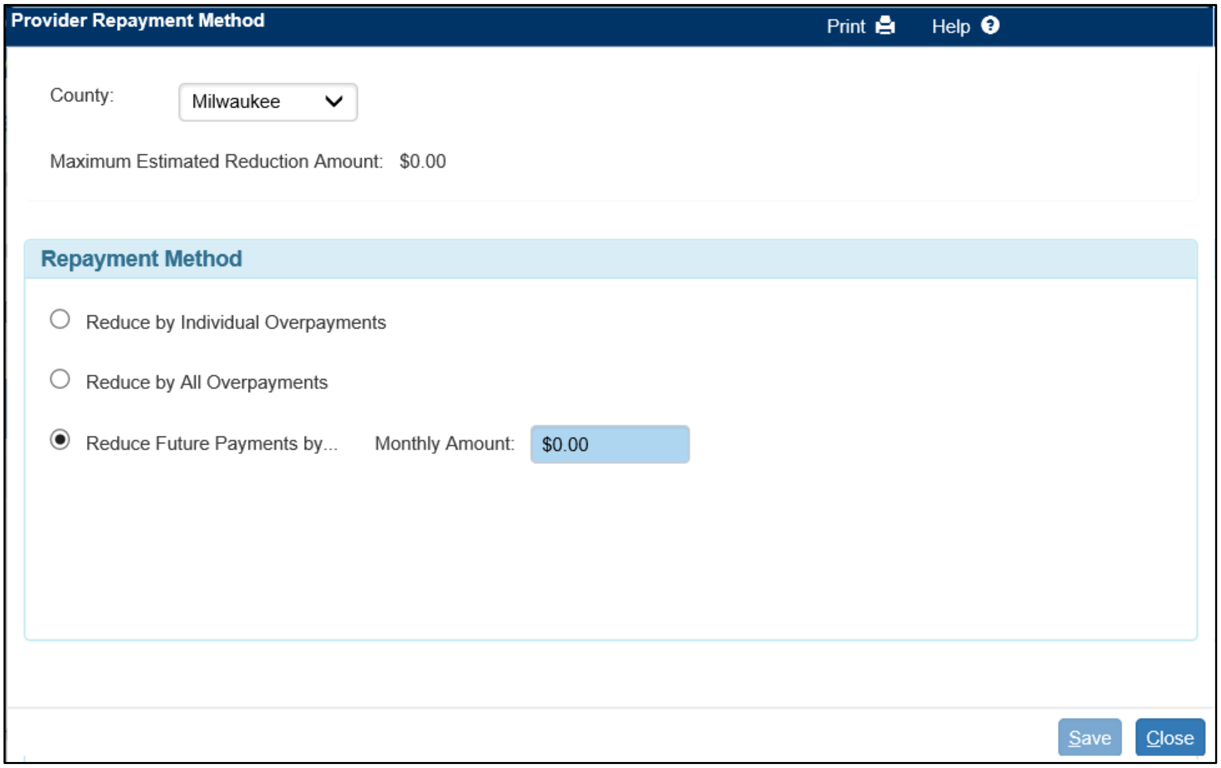

Potential Address Matches
Print
Help
eWiSACWIS has found the following potential matches to this address. Please check the list below before creating a new person and/or provider record.
Potential Matches
Group Home (9223085) Other - Organization 123 Main St, Pittsville, WI 54466
Group Home (9222525) Group Home 123 Main St, Pittsville, WI 54466
My Child Placing Agency (9222265) Child Placing Agency 123 Main St, Pittsville, WI 54466
Continue
Close

17. On the Potential Address Matches page, if the potential matches for this address do not match the provider you are creating, click the Close button to continue creating the provider. This will return you to the Private Provider page.

18. If there is a match of the provider you are trying to create, select the radio button next to the provider and click Continue. If the provider record is open, you will be presented with the Create Worker Assignment page. If the provider record is closed, you will be presented with the Private Provider page. To reopen the closed provider, click Save on the Private Provider page.

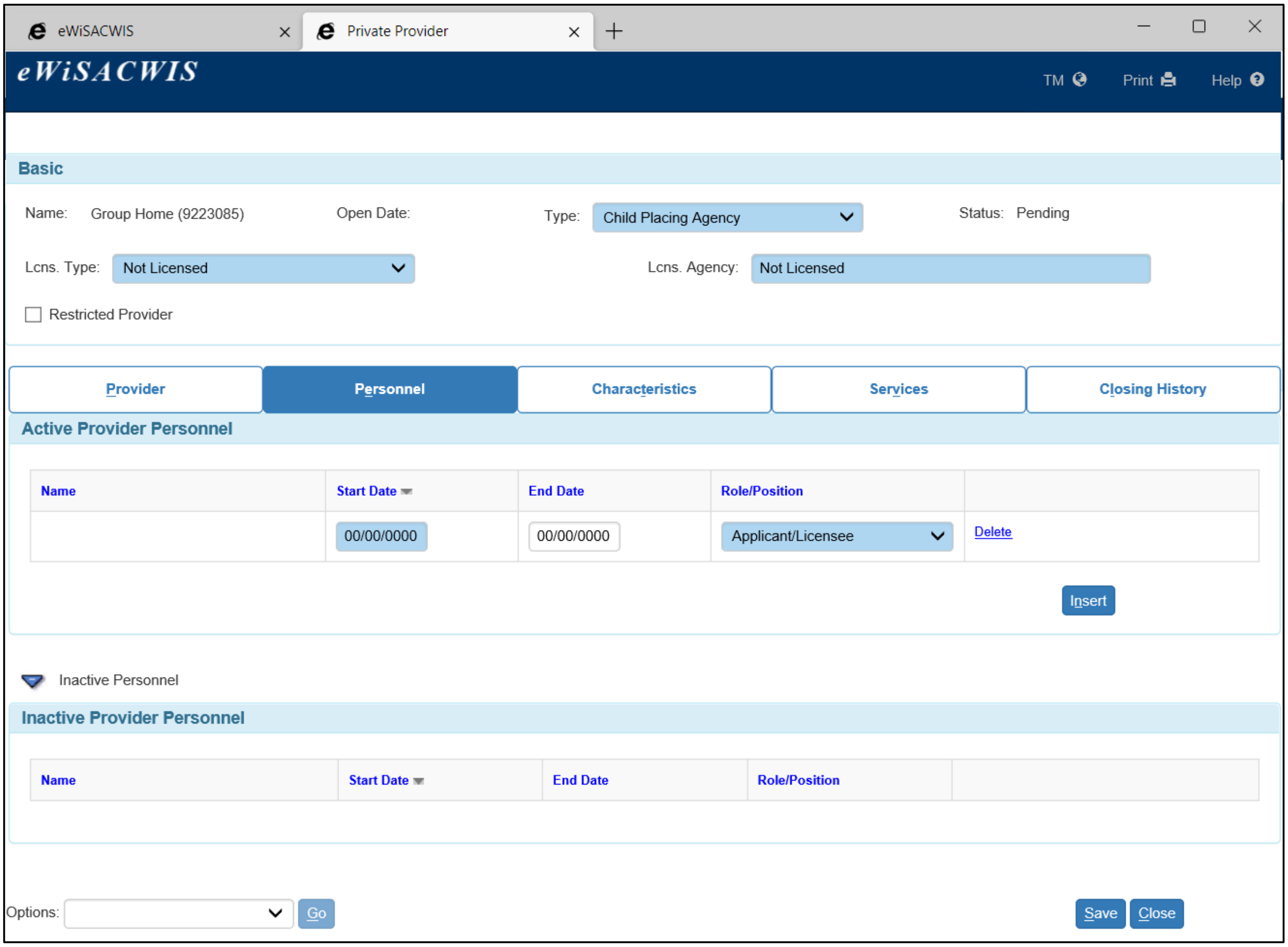


19. Reselect the value of Provider Repayment Method from the Options drop-down and click Go. The Provider Repayment Method is used to specify the method used to recoup any overpayments made to this provider. The Provider Repayment Method pop-up page appears. The county field is the county that is collecting an overpayment. Select from one of the three options for recovering the overpayment:
    - Reduce by Individual Overpayments – This option indicates that the repayment method for this provider/county is being handled at the individual overpayment level.
    - Reduce by All Overpayments – This option designates that the total of all overpayments made to this provider in this county should be removed from the provider's next check from this county.
    - Reduce Future Payments by… -- This option designates that the amount entered in the Monthly Amount field should be removed from the provider's next check from this county.

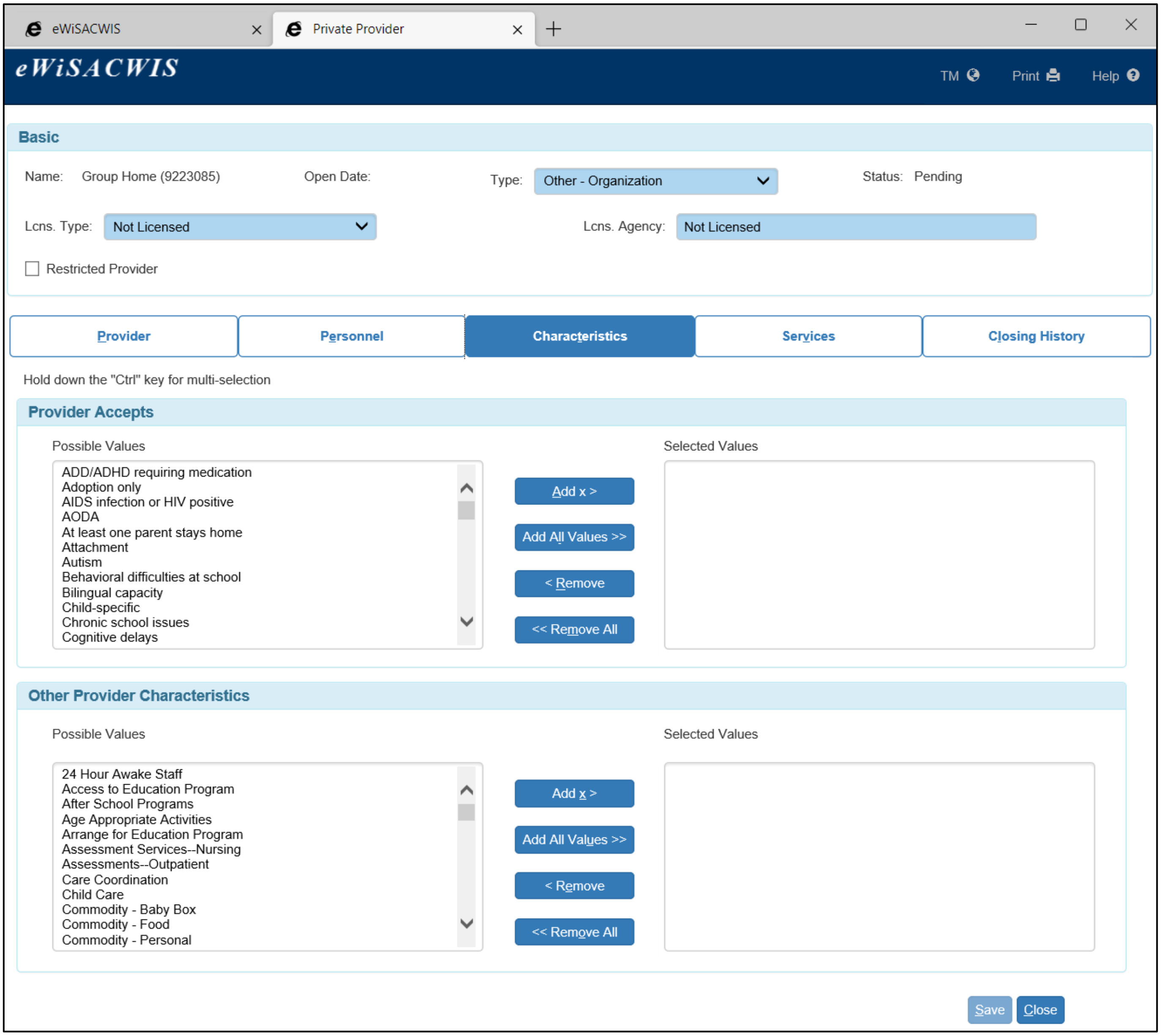


Click Save and Close to return to the Private Provider page.

20. The Personnel tab is used to document the Employee, Volunteer/Student Intern for the business type private provider and Applicant/Licensee and Household Member/Occupant for the person type private provider. Selecting a Role/Position of Applicant/Licensee from the drop down launches the Person Search page. Selecting any of the other values for Role/Position launches the Provider Personnel Search page.



21. The Characteristics tab allows you to record information that assists a worker when making placement decisions for a child. In the Provider Accepts group box, you can select one or multiple values by using the CTRL key on the keyboard and selecting the Add button. This will move the selected values to the Selected Values box. The same process is used to remove Selected Values and using the Remove button. Follow the same process for the Other Provider Characteristics group box. Private Providers (Congregate Care providers) accessing the Support Children aNd Youth (SYNC) application also can update their Other Provider Characteristics within the SYNC application. If updates are made from SYNC, the name of the SYNC provider will appear with (SYNC) behind the name, along with a date and timestamp. Child Placing Agencies in SYNC do not have this ability.



22. The Services tab maintains current information about the specific services offered by the provider.

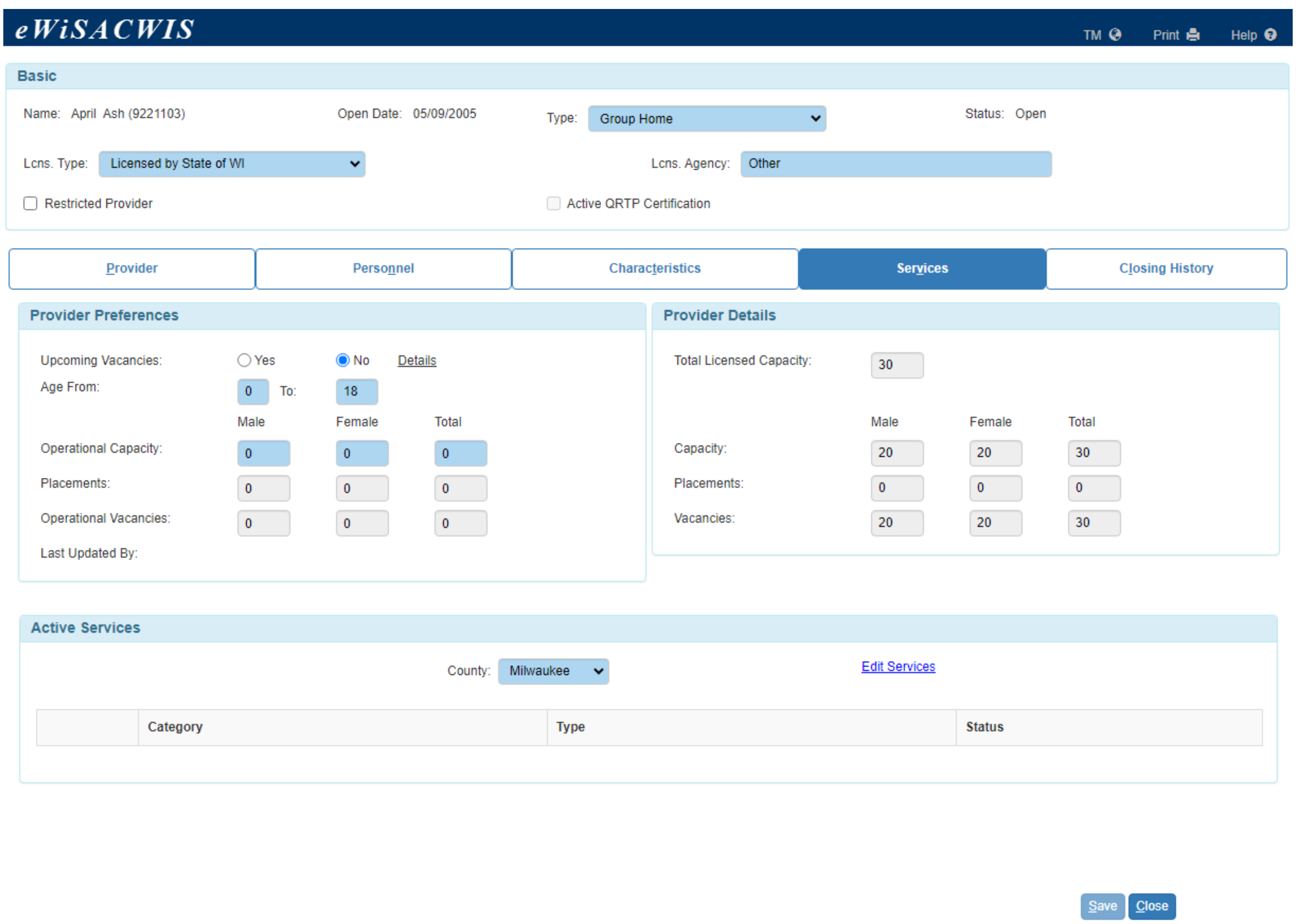
   - The SYNC Congregate Care Providers will also select Upcoming Vacancies within the SYNC application, depending on their anticipated capacity. When this page is opened, the Upcoming Vacancies radio button will default to blank. If updates are needed for the page and no selection has been made, select No by default and Save. SYNC providers can then change the information within the SYNC application if needed. Child Placing Agencies cannot update this information in SYNC.

   - The Age From and Age To fields are editable but Age From cannot be less than the Age From field on the most recent active license, and the Age To cannot exceed the Age Through field on the most recent active license. SYNC Providers are also able to update these fields (within what they are licensed for), to provide a better match when Child Welfare Professionals are using the Congregate Care Referral and seeking Provider Matches. Child Placing Agencies cannot update this information in SYNC.

- The Provider Preferences group box is user entered. Operational Capacity fields are used by Private Providers accessing the Support Children aNd Youth (SYNC) application. The total of Operational Capacity for Males, Operational Capacity for Females, and Operational Capacity Total cannot exceed the Total Licensed Capacity. When the Total Licensed Capacity is entered in the Provider Details group box, it will pre-fill the Operational Capacity for Males and Operational Capacity for Females. The Total Licensed Capacity documents the number of children the provider is licensed to accept. Child Placing Agencies cannot update this information in SYNC.

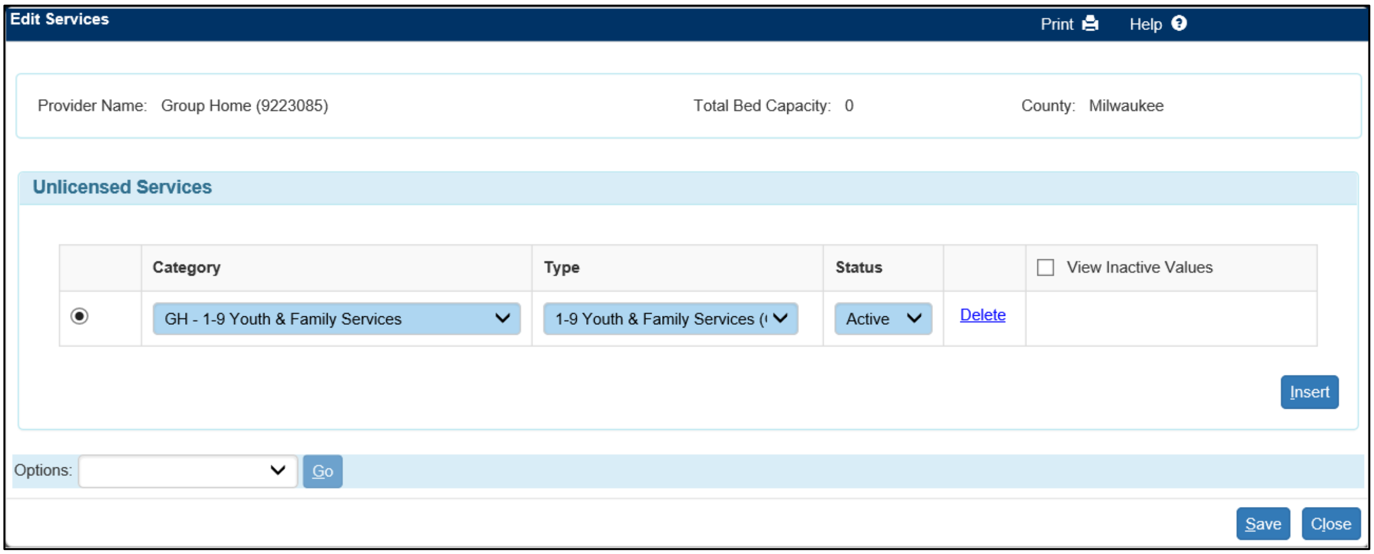
- Of note, Operational Capacity will be updated from SYNC Providers within the SYNC application. When this is updated, the page will display their name followed by (SYNC) with a date and time stamp of the update. Operational Vacancies fields document the number of children the provider has available space for using the Operational Capacity fields and subtracting the Placements which are system derived. These values are used on the Congregate Care Referral page to help direct Child Welfare Professionals on availability when sending out referrals. Child Placing Agencies cannot update this information in SYNC.

- In the Provider Details group box, Capacity documents the number of children the provider is licensed to accept, and the Placements and Reservations boxes are system derived.

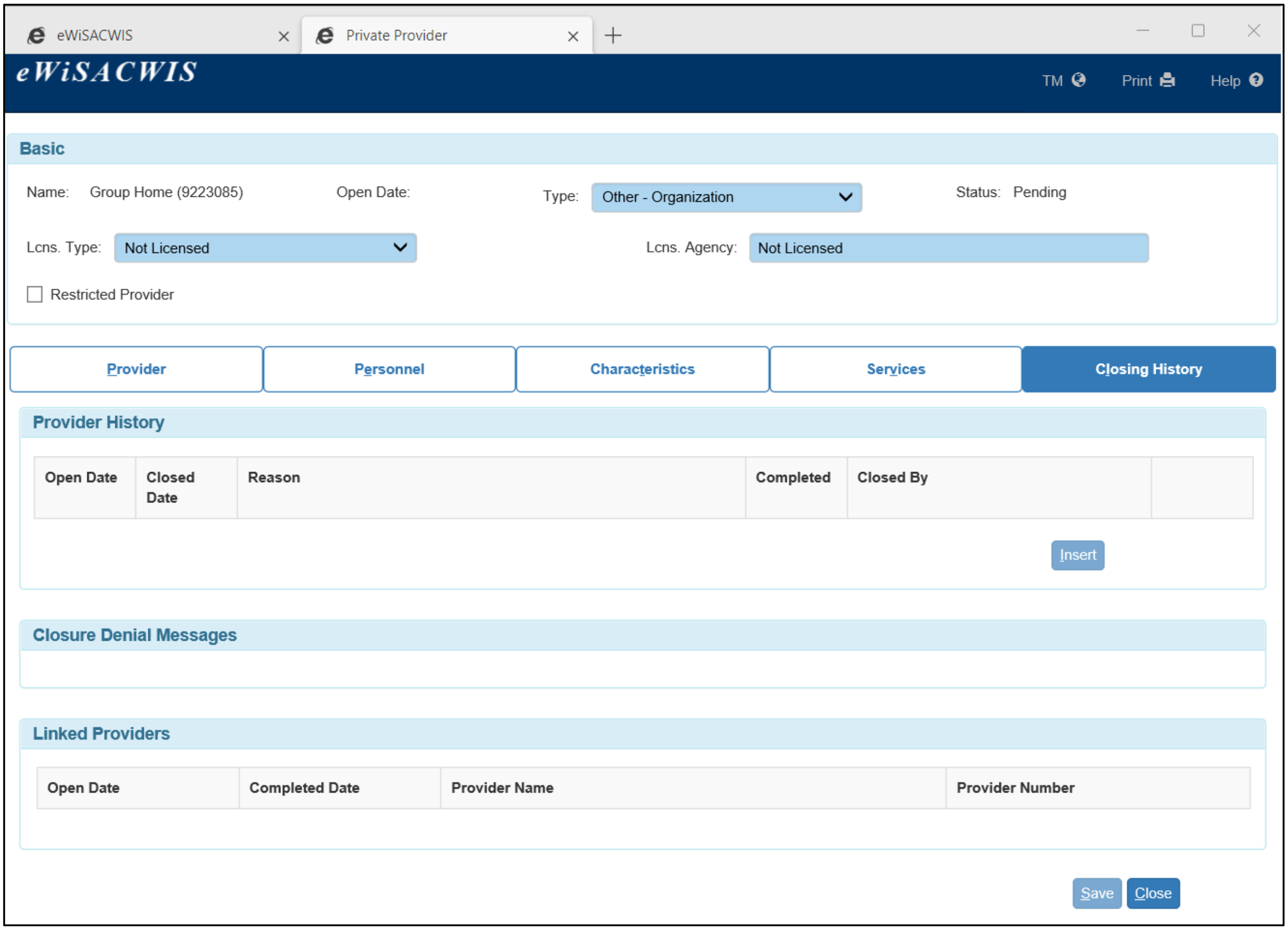


23. The Active Services group box shows active services for the provider. To add an unlicensed service, select the Edit Services hyperlink to open the Edit Services page. If you have not yet saved, you will receive the message ‘Please save the changes before you continue.’. Click Save on the Private Provider page.

24. On the Edit Services page, the Unlicensed Services group box contains the Category, Type and Status. Select the appropriate values from the drop-downs. Remember to change the Status to Active. The Delete hyperlink will allow the row to be deleted from the record. Click Save and Close.



25. The final tab is the Closing History tab. the Closing History tab displays information about each time the provider record is closed in the Provider History group box. Each row displays the open and closed dates, the reason for closure, and the name of the worker who completed the closure.

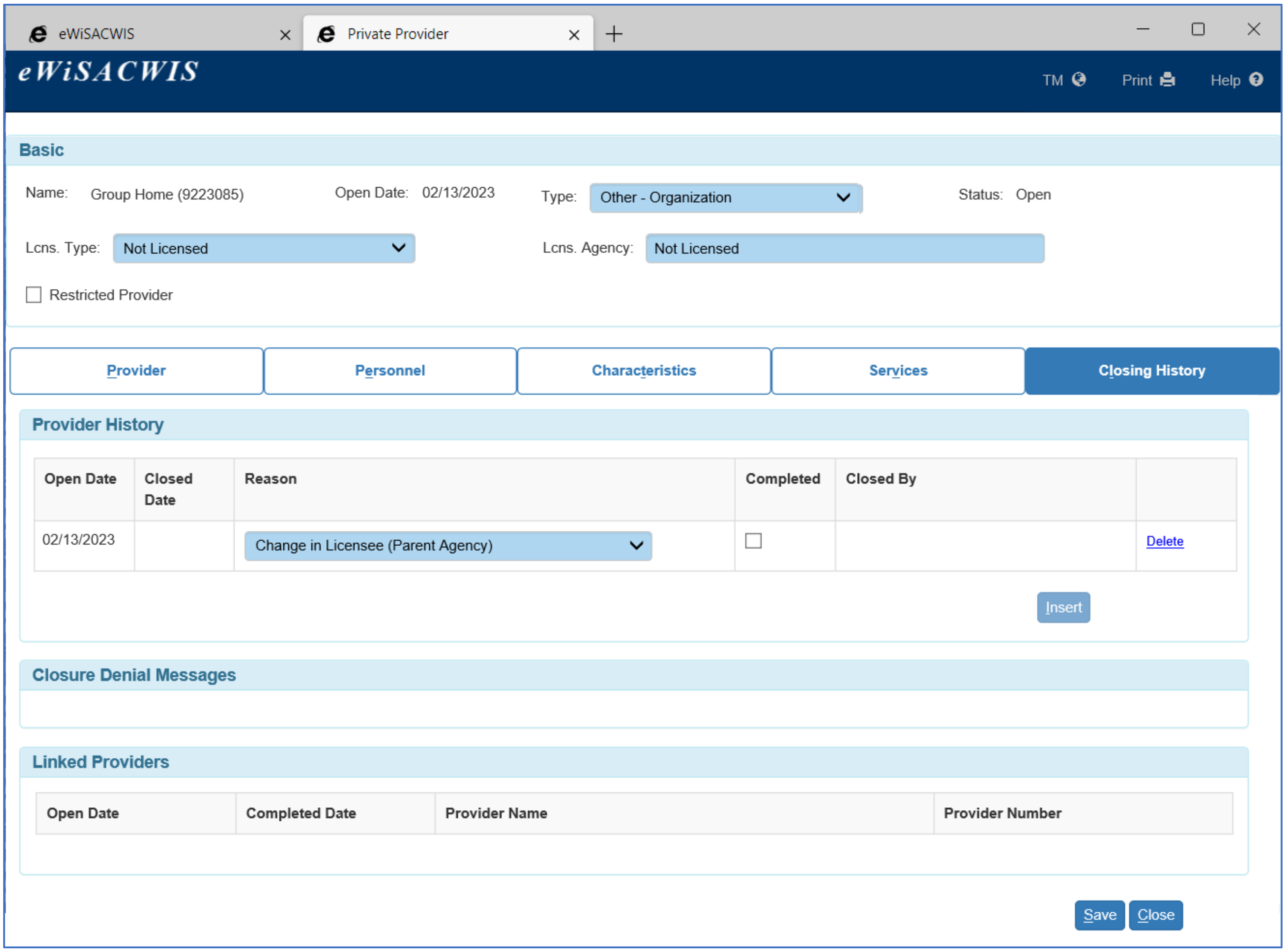


26. To approve the provider record, click on the Provider tab and select approval from the Options drop-down and click Go. To On the Approval History page, click the Approve radio button and click Continue. Back on the Private Provider page, click the Save button.

<u>Closing the private provider record:</u>

Note: Before closing a Private Provider record, please be sure to revoke any SYNC Administrator(s) who have access to the application. See pages 4-5 for details.

1. For a provider record that is final approved, click the Insert button in the Provider History group box to start the closure process. The Open Date will pre-fill based on when the provider record was opened or reopened. The Closed Date will pre-fill when the closure has been accepted. The Reason drop-down is a user-selected field. The Completed checkbox allows the user to submit the provider for closure. If this checkbox is not checked, the provider record will remain open and the closure denial messages will not be validated. The Closed By field will pre-fill with the name of the worker who completed and saved the closure.



2. If the provider is denied closure, see the Closure Denial Messages group box. Once all messages have been corrected, select the Completed checkbox and click Save. Verify there are no other denial messages. If the page has become frozen, the closure was successful. If the page remains enabled, view the closure denial messages and fix the errors. See the Closing a Provider Record User Guide for additional information.