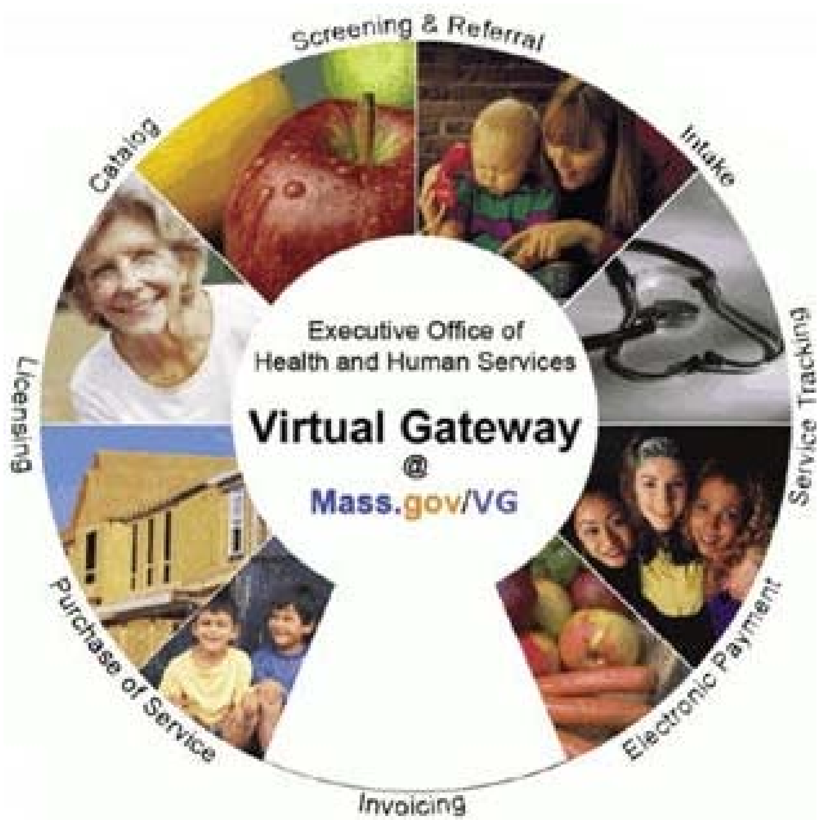
Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway



Purchase of Service (POS) Provider Data Management Provider User Manual

Release3.0

November 2008

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Chapter 1: Introduction and Overview to the Virtual Gateway

Introduction

Provider Data Management is an online service that gives *Purchase of Service (POS)* providers a single place to view, upload and edit information commonly requested by Health and Human Services agencies. The service also provides EOHHS agencies with a single place to view provider information (login required).

This module discusses the following topics:

- What is the Virtual Gateway
- System Requirements
- Accessing the Virtual Gateway
- Password management
- Accessing agency services

What is the Virtual Gateway?

The Virtual Gateway is a single point on the internet for accessing programs and services offered by the Executive Office of Health and Human Services (EOHHS).

The ultimate goal of the Virtual Gateway is to streamline service access and coordinate service delivery. It serves three important groups:

- Internal Health and Human Services staff
- Service provider staff
- Consumers

In addition to PDM, the Virtual Gateway also offers:

- **Catalog:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.
- **Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.
- **Common Intake:** A single, online data collection tool for registered providers to create applications for multiple

programs and services.

- **Enterprise Invoice Management/Enterprise System Management (EIM/ESM):** A web-based billing and service delivery-reporting system for Purchase of Service (POS) providers and is one of the many services offered through the Virtual Gateway. Use of specific EIM/ESM modules is discussed in later modules.
- **Transitional Assistance Gateway:** An online inquiry tool for registered agencies to view secure case management information for various transitional assistance programs, including Food Stamps, financial assistance, and homeless services (login required).
- **Service and Transition Planning:** An online tool for registered EOHHS staff and providers to support collaborative treatment planning and referral services for certain clients served by EOHHS (login required).
- **IRIS Services for Deaf and Hard of Hearing Consumers:** An online service for providers to request ASL interpreter or CART services on behalf of consumers; for ASL interpreters and CART reporters to post availability schedules, review and apply for open jobs (login required).
- **Homeless Management Information Systems:** The *Homeless Management Information Systems (HMIS)* perform data collection to capture information about citizens who experience homelessness (login required).
- **Mental Retardation Quality Management Reporting (HCSIS):** A service for POS providers, Department of Mental Retardation (DMR) staff, human rights coordinators, and others to file clinical information and reports on incidents, medication, restraints, and investigations for DMR clients (login required).
- **Senior Information Management System (SIMS):** An online data collection, case management, and reporting tool for Executive Office of Elderly Affairs (EOEA) agencies and providers. It enables users to track various programs for elders, including intake and referral, home care, nutrition, clinical assessments, and more (login required).

System

System Requirements for the Virtual Gateway

Requirements

All computers used to access the Virtual Gateway require Internet Explorer 6.0 or higher.

For the PDM application, the minimum system requirements are:

- Windows (98, 2000 or XP Business)
- Internet Explorer 6.0 or higher
- 800x600 screen resolution
- 300MHz CPU and 128MB RAM

Additionally, the preferred system features to enhance the performance of PDM are:

- Windows XP (Business Class)
- 1024x768 screen resolution
- 500MHz CPU and 256MB RAM

Acceptable Alternatives:

- Operating System
    - Mac OS X
- Browsers:
    - Safari (Mac)
    - Firefox
    - Netscape

Note: Testing on the PDM application has not been conducted on these alternative platforms therefore compatibility issues may result.

Tip: If a lower screen resolution is selected, then the user needs to select the “Smaller” text size.

1. Select the View menu from the Internet Explorer browser.
2. Select **Text Size>>Smaller**.

Notes:

Chapter 2: Getting Started

Introduction

This chapter provides information about the following topics:

- Accessing Provider Data Management (PDM) through the Virtual Gateway as POS Provider.
- Password Management
- Navigation Basics

Accessing PDM through the Virtual Gateway

Access to PDM is through Virtual Gateway Provider Services.

1. Access the Virtual Gateway home page at www.mass.gov/vg and click the Logon link:

2. From the ***Welcome Virtual Gateway User*** page, enter your Virtual Gateway Username (user ID) and Password.

If you are an ***existing*** user, enter your ***current*** password.

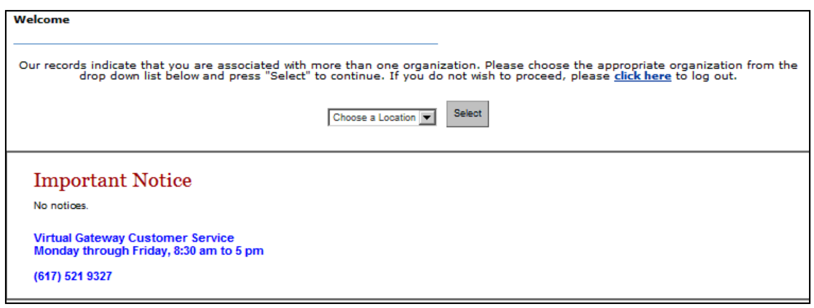
If you are a ***new user***, enter the ***temporary*** password you received from the Virtual Gateway in your New User email.

3. Click the [**Submit**] button.

If you do not need to change your password, the following *Business Service* page will appear; it provides you access to your specific business service(s). **

Business services you have access to will display here.

** If you are associated with more than one organization, you may be directed to the following page prior to the *Business Service* page:



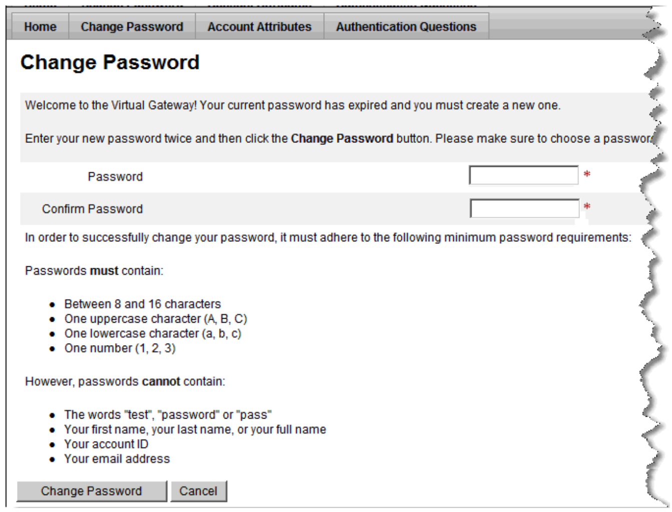
Click the appropriate organization from the drop down list and click [**Select**] to continue. You will be directed to the appropriate business service page.

Changing your password and answering security questions

The *Change Password* page automatically appears ***if*** you are a new user or your password has expired.

Please read and follow the password requirements on the *Change Password* page to successfully change your password. The Virtual Gateway Customer Service team is available to help if you have any questions or run into problems (see contact information on the last page).

4. Read the password requirements on the *Change Password* page. *The format for your password must match the minimum password requirements listed on this page.*
5. Enter and confirm your new password in the required fields (see Password Notes and Tips below).



***Note*:** In order to successfully change your password, you must adhere to the minimum password requirements listed on this page.

Tip: Do not enter passwords that you have recently used.

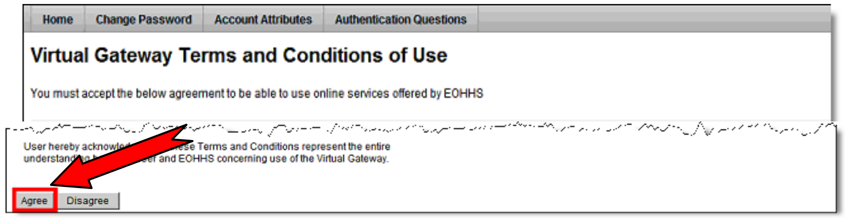
6. Click the [**Change Password**] button.

Once you have successfully changed your password:

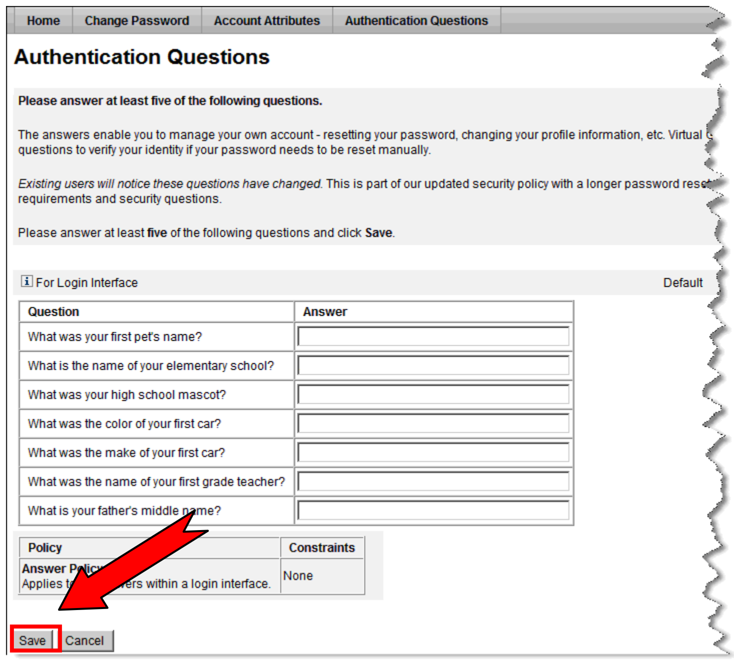
- ***New Users***: The *Virtual Gateway Terms and Conditions of Use* page appears
- ***Existing Users***: The *Business Services* page appears

7. [New Users] Read the Terms and Conditions of Use and click the [**Agree**] button to continue.

***Note*:** Users are required to agree to the Virtual Gateway Terms and Conditions of Use upon first login. If you choose to select Disagree, you will not be able to access the Virtual Gateway.



The *Authentication Questions* page appears.



8. Answer 5 of the 7 of the security questions (they are not case sensitive). Select responses that will be easy for you to remember.
9. Click the **[Save]** button to save your responses.

- The *Business Services* page appears for new users or if your password expired
- The *Manage My Profile* page reappears if you selected this link from the Business Services Page (Click the **[Business Services Page]** button to exit Manage My Profile.)

Password and Security Notes and Tips

- Any time you change your password, forget your password, or call Virtual Gateway Customer Service with a password question, you will need to answer some of the seven authentication questions or provide other security information as verification. Questions are chosen at random.

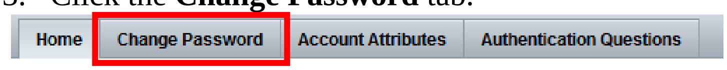
- Use passwords and responses that you are likely to remember, and be sure to ***not*** post this information where others can access it.
- If you feel your password has been compromised, change your password immediately.
- If you receive the error message “Invalid user name & password. Please try again,” retype your Username and Password and click Submit. If after several attempts you still receive this message, call Virtual Gateway Customer Service for assistance.
- You cannot reuse recently used passwords.

Maintaining Account Information

Note: When your password expires, you will automatically be directed to the *Change Password* page to update you password.

~~ Changing your password *before* the expiration date ~~

1. Log in to the Gateway. The *Business Services* page will display.
2. Click the Manage My Profile link in the **[Account Management]** section on the right side of the page.
3. Click the **Change Password** tab.

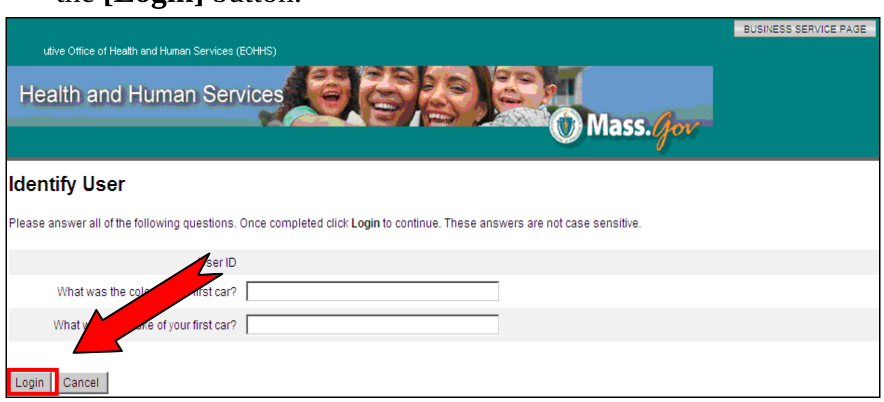


4. Update your password and click Change Password.

   The *Business Services* page will display.

Forgot your password?

1. From the *Welcome Virtual Gateway User* login page, click the Forgot Password? link.
2. Enter your Username and click the **[Submit]** button.
3. Enter the answers to the security authentication questions and click the **[Login]** button.



4. Enter and verify your ***new*** password and click the **[Change Password]** button.

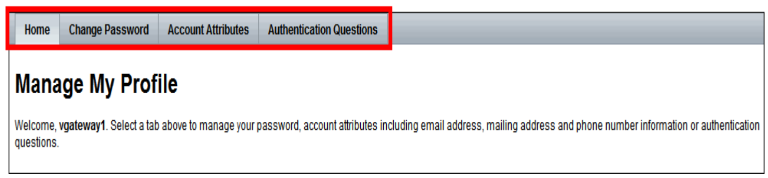
The *Welcome to Virtual Gateway User* page appears.

5. Log in using your Username and new Password.

~~ MANAGING OR CHANGING YOUR ACCOUNT INFORMATION ~~

1. Log in to the Virtual Gateway using your Username and Password.
2. Click the Manage My Profile link in the **[Account Management]** section on the right side of the page.

The Manage My Profile *page appears.*



Under the **Manage My Profile**, you can manage or change your:

- Password (**Change Password** tab)
- Phone Number or Email Address (**Account Attributes** tab)
- Security Questions (**Authentication Questions** tab)

3. Select the appropriate tab located at the top of the page to change your account information. Follow all instructions provided.
4. Click the**[Save]** button to save any changes.
5. Click the **[Business Services Page]** button to return to the *Business Services* page.

Virtual Gateway Customer Service Information

The Virtual Gateway Customer Service is available to assist with:

- General questions regarding the Virtual Gateway
- Technical questions or system issues
- Questions regarding how to use PDM

- Password resets

Please be prepared to provide the following:

- Name, organization, phone number, email address
- Module/page/field you were working on (if applicable)
- Description of the issue or error message
- Perceived criticality

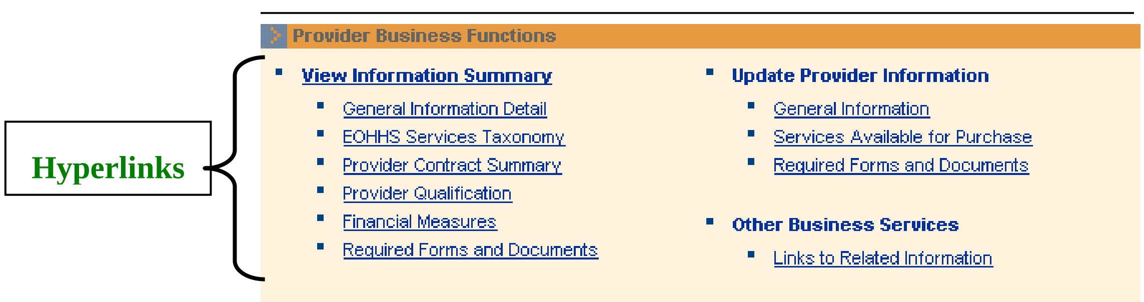
You can reach the Virtual Gateway Customer Service at 1-(800)-421-0938 from 8:30 a.m. to 5 p.m. Please leave a message if calling after hours.

Navigation Basics

Breadcrumbs are a roadmap of how you navigated from one place to the next in *PDM*. They provide you with a map of where you started, the next step in that workflow, and what page you are currently working on.

The following is an example of a breadcrumb.

Using the hyperlinks provided allows you to navigate to other pages within *PDM*.

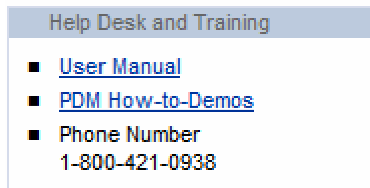


Navigating to other pages to view more detailed information about a provider can also be performed by using the **Go To Details** link available on the **Provider Summary Information** page.

Customer Service and Training

Having trouble with navigating and procedures within *PDM* or understanding business process behind the procedure? This section describes how to get help right from within *PDM*.

The following is a sample of *PDM's* help section which links to the Training and Assistance Materials page accessible through the Virtual Gateway. The Virtual Gateway Customer Service phone number is also provided below.



Online Help Links

You can use these page links to navigate and view help information.

Function	Action
To view *PDM* User Manual Information	Click the **User Manual** link. ***Result:*** *The* ***Provider Data Management Training and Assistance Materials*** *page appears.*
To view movie demonstrations of how to navigate *PDM* Business Services	Click the **PDM How-to Demos** link. ***Result:*** *The* ***Provider Data Management Training and Assistance Materials*** *page appears; scroll to bottom of the page.*

Notes:

Chapter 3: Purchase of Service (POS) Provider Data Management

Introduction

Welcome to the Provider Data Management (PDM) Business Service.

PDM Business Service is web-based, secretariat wide service, where Purchase of Service providers will be able to store standard forms and documents, view contract information, maintain and update their organizational profile, and view the pre-populated financial assessment measures.

Overview

The *PDM* Business Service is intended to serve as a well-organized, user-friendly, easily navigated "filing system" of provider data.

It is important to note that the application requires both web-based data entry and population of the *PDM* data from external source systems.

It will store basic organizational information, standard completed forms and applications either completed on-line in *PDM* or in other source systems, such as the Uniform Financial Report (UFR) from the OSD eFiling website, and the Commonwealth Information Warehouse (CIW).

Weekly data pulls from MMARS, the Commonwealth's management accounting and reporting system, maintains current contract encumbrance and expenditure data for each provider. Hyperlinks to other Commonwealth websites, such as the Corporations Division of the Secretary of State's Office (SEC), the Operational Services Division (OSD), and the Office of the State Comptroller (OSC) will permit easy access to general information for all users of *PDM*.

Provider Benefits

Provider benefits will include:

- Reduction of duplicative data entry and form submission, copying, distribution and storage by providers which is part of the re-contracting and licensing activities
- The ability to view and update their own organizational information through the *PDM* service

- The ability to view data supplied by other systems of record, such as MMARS

Key Functionality

There are three main business functions to the *PDM* workflow. These business functions include:

- View data
- Perform ad hoc reporting on one or more providers using the Enterprise Reporting Tool
- Update data

Target Audience

While the *PDM* Service focuses on three key business functions, some functions are unavailable depending on your role. *PDM* focuses on the following four roles:

- All Providers will be able to view information.
- Some Providers will be able to update information (depending on access level).
- State Agencies will be able view and print standard reports and create ad hoc reports.
- EOHHS Provider Qualification Staff will have the capability to post provider qualification information and corrective measures based on a review of the following documents:
    - CPA prepared Uniform Financial Statements and Independent Auditor's Report (UFR)
    - Office of the State Auditor (OSA) audit reports
    - EOHHS Financial Reviews
    - EOHHS Agency Financial Reviews
    - Surplus Revenue Retention (SRR) Summary

Notes:

Chapter 4: Viewing Provider Business Functions

Introduction

From the Provider Business Functions page, you can access additional *PDM* pages where you can:

- View a quick summary of provider information
- View detailed information about the provider
    - EOHHS Service Taxonomy
    - Contract Summary
    - Qualification Data
    - Financial Measures
- Update provider information
- View a list of links to other related information
- Exit *PDM*

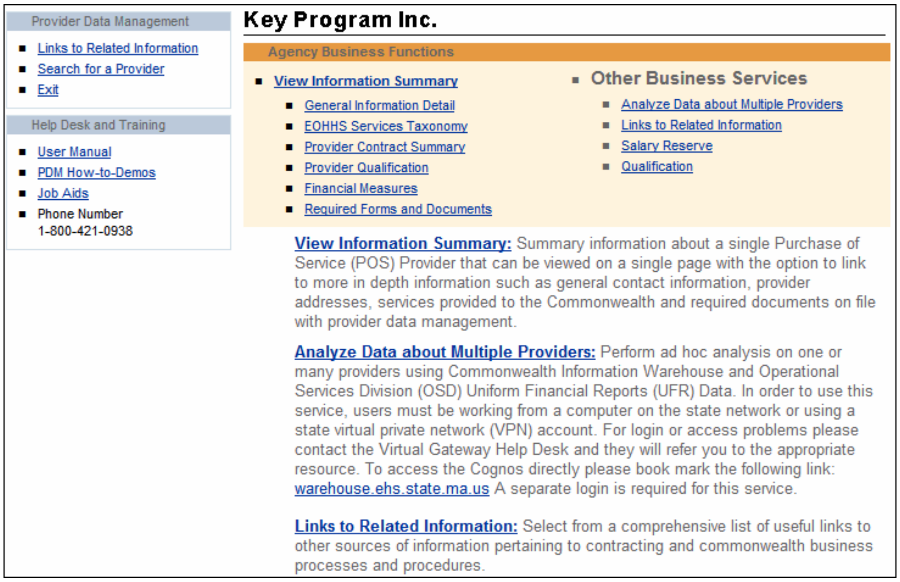
Important: The **Provider Business Functions** pages view varies depending on the user's role.

Users with a **view** role can access links to view information.

Users with an **update** role can access links to view and update information.

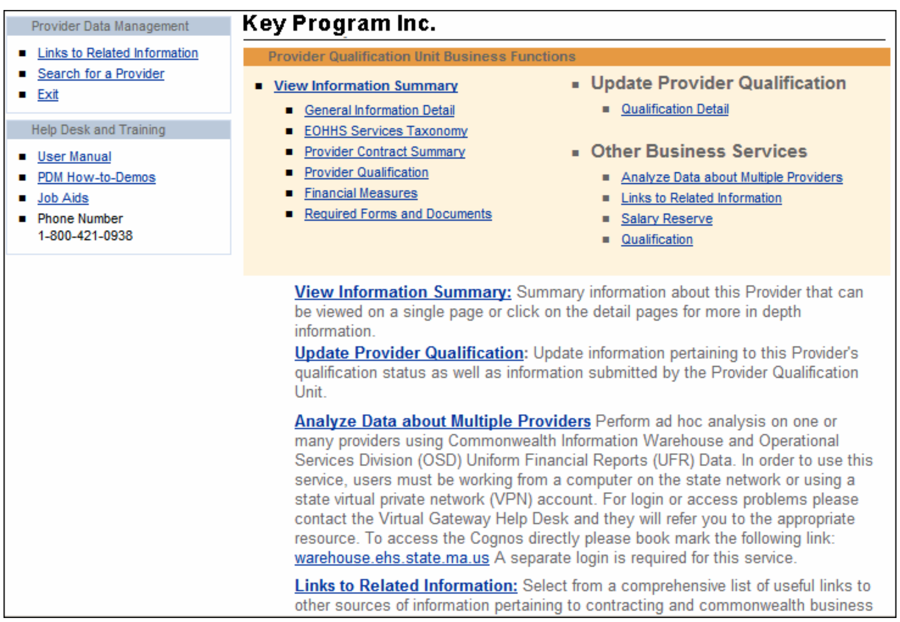
Viewing Provider Business Functions Page (View Role)

The following is an example of the **Provider Business Functions** page (view role).



Viewing Provider Business Functions Page (Update Role)

The following is an example of the **Provider Business Functions** page (update role).



Provider Business Functions (View Role)

The following table lists the functions and actions of the **Provider Business Functions** page.

From this page, you can navigate to view the following Provider information.

Function	Action
To view a quick summary of important information about a Provider	Click the **View Information Summary** link. ***Result:*** *The **Provider Summary Information** page appears.*
To view contact and general corporate information	Click the **General Information Detail** link. ***Result:*** *The **General Information Detail** page appears.*
To view information on available services, both contracted and non-contracted through EOHHS	Click the **EOHHS Services Taxonomy** link. ***Result:*** *The **Other Services Provided Detail** page appears.*
To view a Provider's Contract information	Click the **Provider Contract Summary** link. ***Result:*** *The **POS Provider Contract Detail** page appears.*

Function	Action
To view a Provider's Qualification information	Click the **Provider Qualification** link. ***Result:*** *The* ***Provider Qualification*** *page appears.*
To view Financial Measures and the Uniform Financial Report (UFR) filing status	Click the **Financial Measures** link. *Result: The* ***Detail Financial Measures*** *page appears.*
To View Required Forms and Documents	Click the **Required Forms** and **Documents** link. ***Result:*** *The* ***View Required Forms and Documents*** *page appears.*
To view a comprehensive list of related information	Click the **Links to Related Information** link. ***Result:*** *The* ***Related Links*** *page appears.*
To exit *PDM*	Click the **Exit** link located at the top left corner of the page under **>Provider Data Management**. ***Result:*** *The PDM window closes. The user remains logged into the Virtual Gateway Business Services.*

Provider Business Functions (Update Role)

You can use these functions to navigate to update information.

Function	Action
To update a Provider's contact and general corporate information	Click the **Update Provider Information** link. **OR** Click the **General Information** link under the **Update Provider Information** bullet. ***Result:*** *The* ***Update General Information*** *page appears.* ***Result:*** *The* ***Update General Information*** *page appears.*
To update Provider services not currently provided to EOHHS	Click the **Services Available for Purchase** link. ***Result:*** *The* ***Update Services Provided*** *page appears.*
To update a Provider's Required Forms and Documents	Click the **Required Forms and Documents** link under the **Update Provider Information** bullet. ***Result:*** *The* ***Update Required Forms and Documents page*** *appears.*

Notes:

Chapter 5: Viewing Provider Data Management Information

Introduction

PDM allows you to view information in two ways:

- View summary information
- Access more detailed information with links to other pages

Note: The majority of the data for the Provider Data Management Business Services is sourced from the Commonwealth Information Warehouse (CIW), OSD UFR database, EOHHS agencies, and the remaining information is submitted by the providers.

Overview

Use the **Provider Summary Information** page to view the following summary information about a Provider. Check for current content

- Contact Information
- Executive Contacts
- General Corporate Information
- Services Provided to Commonwealth
- Provider's EOHHS POS Contract Summary
- Provider's Commonwealth Revenue
- Provider Qualification
- Financial Measures
- Required Forms and Documents on File

Purchase of Service (POS) Integrity Unit

The Purchase of Service (POS) Integrity Unit:

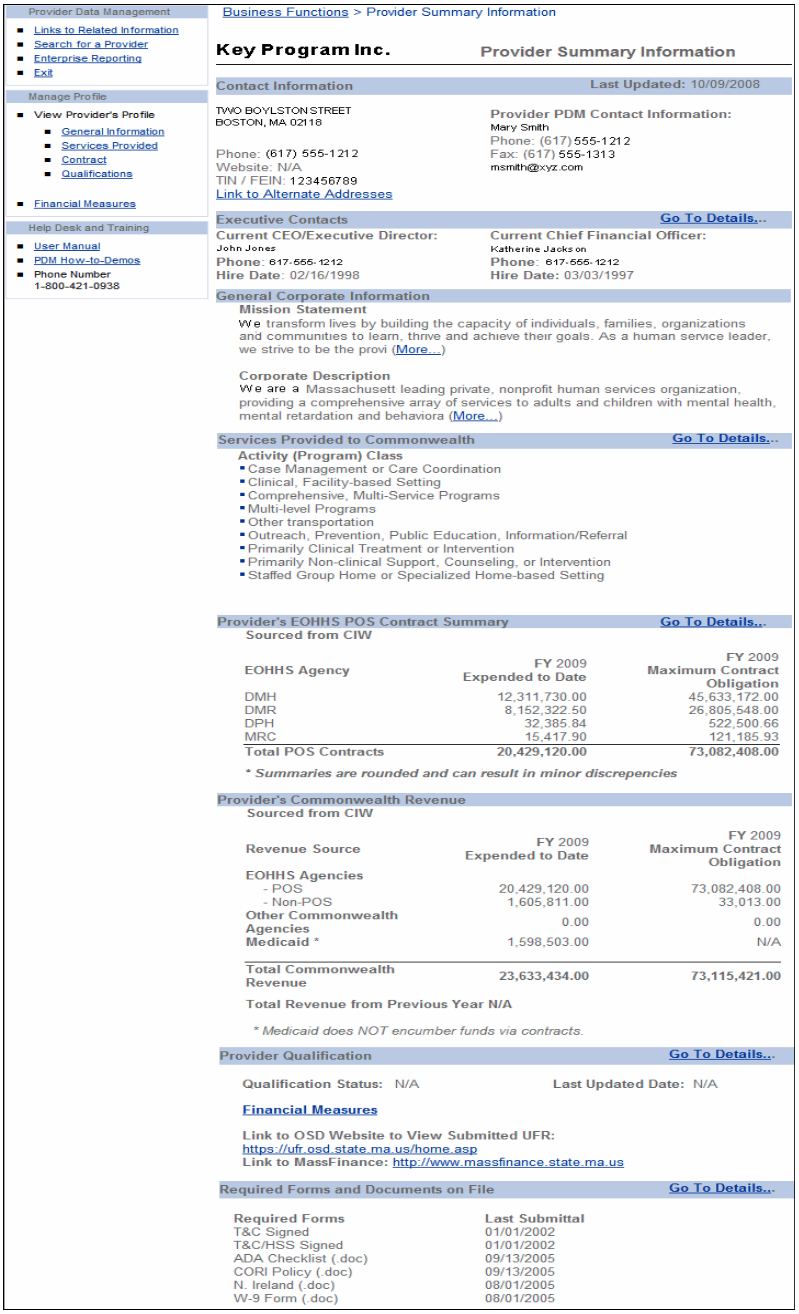
- Develops policies and procedures to qualify all providers.
- Standardizes the Financial Assessment Measures and establishes benchmarks. The Financial Measures assist EOHHS agencies in assessing the financial stability of a provider, and are pre- populated in PDM when the Operational Services Division (OSD) receives a Provider's annual Uniform Financial Report (UFR) and parses the information into the OSD database.
- Coordinates external audit report responses in conjunction with the appropriate agencies.

Note: This unit is responsible for monitoring the update of a provider's annual qualification status and, if necessary, entering comments about the provider using the **Provider Qualification** page.

Provider Summary Information Page

Access the **Provider Summary Information** page by clicking the **View Information Summary** link from the **Business Functions** page.

The following is an example of the **Provider Summary Information** page.



Provider Data Management
- Links to Related Information
- Search for a Provider
- Enterprise Reporting
- Exit

Manage Profile
- View Provider's Profile
  - General Information
  - Services Provided
  - Contract
  - Qualifications
- Financial Measures

Help Desk and Training
- User Manual
- PDM How-to-Demos
- Phone Number 1-800-421-0938

Business Functions > Provider Summary Information

Key Program Inc. — **Provider Summary Information**

Contact Information — Last Updated: 10/09/2008

TWO BOYLSTON STREET
BOSTON, MA 02118

Phone: (617) 555-1212
Website: N/A
TIN / FEIN: 123456789
Link to Alternate Addresses

Provider PDM Contact Information:
Mary Smith
Phone: (617) 555-1212
Fax: (617) 555-1313
msmith@xyz.com

Executive Contacts — Go To Details...

Current CEO/Executive Director:
John Jones
Phone: 617-555-1212
Hire Date: 02/16/1998

Current Chief Financial Officer:
Katherine Jackson
Phone: 617-555-1212
Hire Date: 03/03/1997

General Corporate Information

Mission Statement
We transform lives by building the capacity of individuals, families, organizations and communities to learn, thrive and achieve their goals. As a human service leader, we strive to be the provi (More...)

Corporate Description
We are a Massachusett leading private, nonprofit human services organization, providing a comprehensive array of services to adults and children with mental health, mental retardation and behaviora (More...)

Services Provided to Commonwealth — Go To Details...

Activity (Program) Class
- Case Management or Care Coordination
- Clinical, Facility-based Setting
- Comprehensive, Multi-Service Programs
- Multi-level Programs
- Other transportation
- Outreach, Prevention, Public Education, Information/Referral
- Primarily Clinical Treatment or Intervention
- Primarily Non-clinical Support, Counseling, or Intervention
- Staffed Group Home or Specialized Home-based Setting

Provider's EOHHS POS Contract Summary — Go To Details...
Sourced from CIW

EOHHS Agency	FY 2009 Expended to Date	FY 2009 Maximum Contract Obligation
DMH	12,311,730.00	45,633,172.00
DMR	8,152,322.50	26,805,548.00
DPH	32,385.84	522,500.66
MRC	15,417.90	121,185.93
Total POS Contracts	**20,429,120.00**	**73,082,408.00**

** Summaries are rounded and can result in minor discrepencies*

Provider's Commonwealth Revenue
Sourced from CIW

Revenue Source	FY 2009 Expended to Date	FY 2009 Maximum Contract Obligation
EOHHS Agencies		
- POS	20,429,120.00	73,082,408.00
- Non-POS	1,605,811.00	33,013.00
Other Commonwealth Agencies	0.00	0.00
Medicaid *	1,598,503.00	N/A
Total Commonwealth Revenue	**23,633,434.00**	**73,115,421.00**

Total Revenue from Previous Year N/A

** Medicaid does NOT encumber funds via contracts.*

Provider Qualification — Go To Details...

Qualification Status: N/A   **Last Updated Date:** N/A

Financial Measures

Link to OSD Website to View Submitted UFR:
https://ufr.osd.state.ma.us/home.asp
Link to MassFinance: http://www.massfinance.state.ma.us

Required Forms and Documents on File — Go To Details...

Required Forms	Last Submittal
T&C Signed	01/01/2002
T&C/HSS Signed	01/01/2002
ADA Checklist (.doc)	09/13/2005
CORI Policy (.doc)	09/13/2005
N. Ireland (.doc)	08/01/2005
W-9 Form (.doc)	08/01/2005

Provider Information Summary Functions

You can use the following links to navigate to more detailed information for a POS Provider's organization.

Tip: After viewing information on additional PDM pages, click the browser **Back** button to return to the **Provider Summary Information** page.

Function	Action
To view the POS Provider's Alternate Mailing address	Click **Link to Alternate Addresses**. ***Result:*** *The **General Information Detail** page appears.*
To e-mail the Provider PDM contact	Click the Provider PDM Contact e-mail address located within the **Contact Information** section of the page. ***Result:*** *A blank Outlook e-mail message page appears.*
To view more information about mission statement and corporate description	At the end of the paragraph, click **(More…)**. ***Result:*** *The **General Information Detail** page appears.*
To view more information about services provided	Next to the **Services Provided to the Commonwealth** heading, click **Go To Details…**. ***Result:*** *The **Other Services Provided Detail** page appears.*
To view more information about contracts	Next to the **Provider's EOHHS POS Contract Summary** heading, click **Go To Details…**. ***Result:*** *The **POS Provider Contract Detail** page appears.*

Function	Action
To view more information about the provider's qualifications	Next to the **Provider Qualification** heading, click **Go To Details…** ***Result:*** *The **Provider Qualification** page appears.*
To view more information about Financial Measures and the Uniform Financial Report (UFR) filing status	Click the **Financial Measures** link. *Result: The **Detail Financial Measures** page appears.*
To view submitted UFR from the OSD website	Click the following link: https://ufr.osd.state.ma.us/home.asp
To view information from the MassFinance website	Click the following link: http://www.massfinance.state.ma.us
To view a specific form on file	Next to the **Required Forms and Documents on File** heading, click **Go To Details…** ***Result:*** *The **View Required Forms and Documents** page appears.*
To return to the top of the page	Click the **Top** link.
To return to the **Business Functions** page	Click the **Business Functions** link located at the top of the page. Business Functions > Provider Summary Information

Viewing General Information Detail

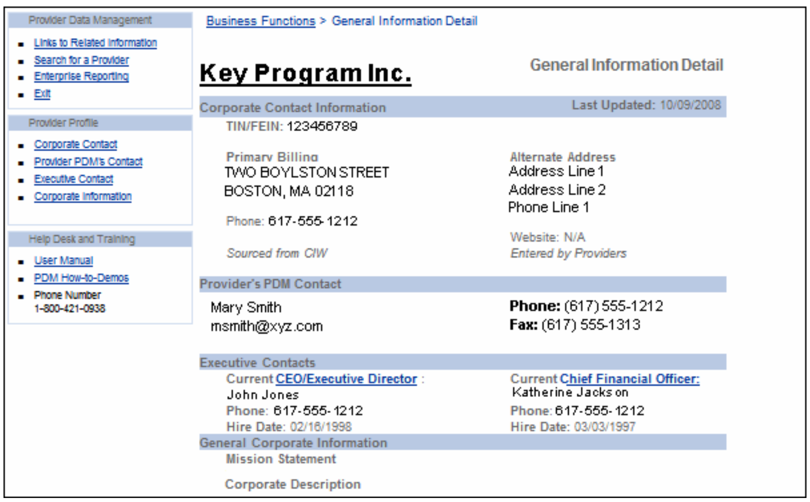
Use the **General Information Detail** page to view the following information about a Provider.

- Corporate Contact Information
- Provider's PDM Contact
- Executive Contacts
- General Corporate Information
  - Mission Statement
  - Corporate Description

General Information Detail Page

Access the **General Information Detail** page by clicking the **General Information Detail** link from the **Business Functions** page.

The following is an example of the **General Information Detail** page.



General Information Detail Functions

You can use the following links to navigate to more detailed information for a POS Provider's organization.

Function	Action
To view the Provider history information	Click the **Provider's** name hyperlink. ***Result:*** *The* ***Provider Audit Trail*** *page appears.* Click **Back** to return to the **General Information Detail**.
To go to the Provider Organization's website	Click the Provider's website address located within the **Corporate Contact** section of the page. ***Result:*** *Internet Explorer opens to the Provider's website.*
To e-mail the Provider PDM Contact	Click the Provider's PDM Contact e-mail address located within the **Provider's PDM Contact** section of the page. ***Result:*** *A blank Outlook e-mail message page appears.*
To view CEO/Executive Director hire information for the POS Provider's organization	Click the **CEO/Executive Director** link. ***Result:*** *The* ***CEO Audit Trail*** *page appears.* Click **Back** to return to the **General Information Detail**.
To view Chief Financial Officer hire information for the POS Provider's organization	Click the **Chief Financial Officer** link. ***Result:*** *The* ***CFO Audit Trail*** *page appears.* Click **Back** to return to the **General Information Detail**.

Tip: To return to the **Business Functions** page, click the **Business Functions** link at the top of the page.

Viewing EOHHS Services Taxonomy

Use the **Other Services Provided Detail** page to view the following information about a Provider.

- Current services contracted through EOHHS
- Other services offered by the Provider but not contracted through EOHHS

Note: The current services provided data is sourced from the contract information in the Commonwealth Information Warehouse (CIW). Information about services offered but not contracted through EOHHS is entered by the provider.

Services Provided Detail Page

Access the **Other Services Provided Detail** page by clicking the **EOHHS Services Taxonomy** link from the **Business Functions** page.

The following is an example of the **Other Services Provided Detail** page.

Viewing Provider Contract Summary

Use the **POS Provider Contract Detail** page to view the following information about the POS Provider's contracts for the current fiscal year:

- Activity Code
- Activity Name
- Doc ID
- Object Code
- Annual Contract Amount
- Expended to Date
- Unexpended Amount
- Totals and Grand Totals for Annual Contract Amount, Expended to Date and Unexpended Amount

POS Provider Contract Detail Page

Access the **POS Provider Contract Detail** page by clicking the **Provider Contract Summary** link from the **Business Functions** page.

The following is an example of the **POS Provider Contract Detail** page.

Business Functions > POS Provider Contract Detail

Key Program Inc. POS Provider Contract Detail

Agency: DMH

Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended to Date	Unexpended Amount
3013	REHAB TREATMENT IN THE COMMUNITY	SCDMH335050031170000	MM3	680,359.94	144,862.92	535,497.06
3031	PROGRAM OF ASSERTIVE COMMUNITY TREATMENT	SCDMH332050030810000	MM3	912,806.38	47,815.26	864,991.12
3031	PROGRAM OF ASSERTIVE COMMUNITY TREATMENT	SCDMH535070051320000	MM3	0.00	0.00	0.00
3031	PROGRAM OF ASSERTIVE COMMUNITY TREATMENT	SCDMH535070051340000	MM3	1,011,431.00	53,224.49	958,206.50
3034	CLUBHOUSE SERVICES	SCDMH633050061080000	MM3	808,588.12	236,672.94	571,915.25
3037	DAY REHABILITATION	SCDMH431050040290000	MM3	6,828.90	1,138.15	5,690.75
3037	DAY REHABILITATION	SCDMH633050061160000	MM3	809,740.62	230,551.48	579,189.12
3039	HOMELESS SUPPORT SERVICES	SCDMH635050061240000	MM3	443,235.56	0.00	443,235.56
3049	ADULT RESIDENTIAL SERVICES	SCDMH321050031740000	MM3	622,075.58	168,708.84	453,366.75
3049	ADULT RESIDENTIAL SERVICES	SCDMH332050031710000	MM3	3,382,520.00	1,116,623.38	2,265,896.75
3049	ADULT RESIDENTIAL SERVICES	SCDMH434050041000000	MM3	3,706,125.00	1,159,598.88	2,546,526.00
3049	ADULT RESIDENTIAL SERVICES	SCDMH534050050940000	MM3	3,057,136.25	933,441.94	2,123,694.25
3049	ADULT RESIDENTIAL SERVICES	SCDMH631050061360000	MM3	5,534,531.59	1,715,509.88	3,819,021.75
3049	ADULT RESIDENTIAL SERVICES	SCDMH631080061420000	MM3	2,783,808.00	848,742.00	1,935,066.00
3049	ADULT RESIDENTIAL SERVICES	SCDMH633050061300000	MM3	6,335,235.00	1,907,571.00	4,427,664.00
3049	ADULT RESIDENTIAL SERVICES	SCDMH635050061240000	MM3	4,566,867.00	1,289,034.00	3,277,833.25
3059	COMMUNITY REHABILITATIVE SUPPO	SCDMH535050050670000	MM3	236,965.42	67,637.76	169,327.66
3059	COMMUNITY REHABILITATIVE SUPPO	SCDMH631080060900000	MM3	986,720.12	203,222.77	783,497.38
3059	COMMUNITY REHABILITATIVE SUPPO	SCDMH633050060400000	MM3	929,538.81	198,840.23	730,698.56
3066	INDIVIDUAL SUPPORT (BLANKET)	SCDMH321060033350000	MM3	961,459.62	45,933.96	915,525.62
3146	COMPREHENSIVE PSYCH SERVICES - CLINIC	SCDMH633070061170000	M2M	2,559,646.25	136,237.23	2,423,409.00
3036	SERVICE FOR EDUCATION & EMPLOYMENT	SCDMH632070060800000	MM3	467,818.88	118,226.88	349,592.00
			Total	45,633,172.00	12,311,730.00	33,321,442.00

Agency: DMR

Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended to Date	Unexpended Amount
3150	Placement Services Tier 2	926009601301DMR00000	MM3	41,487.30	12,797.46	28,689.84
3170	CLINICAL TEAM	926909690336DMR00000	M03	28,904.00	551.60	28,352.40
3176	FAMILY SUPPORT	923409340389DMR00000	MM3	141,269.31	6,949.40	134,319.92
3176	FAMILY SUPPORT	923409340789DMR00000	MM3	24,400.00	2,411.62	21,988.38
3176	FAMILY SUPPORT	926009600390DMR00000	MM3	483,134.06	71,600.58	411,533.47
3176	FAMILY SUPPORT	926009600790DMR00000	MM3	53,585.24	3,535.44	50,049.80
3177	INDIVIDUAL SUPPORT - MH	926209620502DMR00000	MM3	288,774.00	93,754.80	195,019.20
3153	24 HOUR RESIDENTIAL SERVICES	921409140327DMR00000	MM3	3,389,587.25	948,630.81	2,440,956.50
3285	DAY HABILITATION SUPPLEMENT	926909690417DMR00000	M03	571,455.00	204,921.86	366,533.12
3286	COMMUNITY HABILITATION SUPPORT	926009602301DMR00000	MM3	570,619.44	178,002.38	392,617.09
3286	COMMUNITY HABILITATION SUPPORT	926909691312DMR00000	M03	97,510.50	31,685.10	65,825.40
			Total	26,805,548.00	8,152,322.50	18,653,224.00

Agency: DPH

Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended to Date	Unexpended Amount
4725	Tobacco Control Contract Mgt	INTF2900M03703711006	M03	50,169.24	8,289.33	41,879.91
4917	HIV/AIDS Residentail Support Services	INTF4929MM3600614093	MM3	522,500.66	32,385.84	490,114.81
			Total	522,500.66	32,385.84	490,114.81

Agency: MRC

Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended to Date	Unexpended Amount
3286	SUPPORT	926009602301DMR00000	MM3	570,619.44	178,002.38	392,617.09
3286	COMMUNITY HABILITATION SUPPORT	926909691312DMR00000	M03	97,510.50	31,685.10	65,825.40
			Total	26,805,548.00	8,152,322.50	18,653,224.00

Agency: DPH

Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended to Date	Unexpended Amount
4725	Tobacco Control Contract Mgt	INTF2900M03703711006	M03	50,169.24	8,289.33	41,879.91
4917	HIV/AIDS Residentail Support Services	INTF4929MM3600614093	MM3	522,500.66	32,385.84	490,114.81
			Total	522,500.66	32,385.84	490,114.81

Agency: MRC

Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended to Date	Unexpended Amount
2201	VOCATIONAL SERVICES	SCMRC20075004243000A	M03	69,777.40	10,574.70	59,202.70
2205	EXTENDED EMPLOYMENT	SCMRC20075031096000A	M03	15,406.25	2,682.50	12,723.75
2207	VR CHAPTER 688	SCMRC200760310870000	M03	23,038.08	0.00	23,038.08
2225	STATEWIDE HEAD INJURY PROG	SCMRC200760310870000	M03	12,964.20	2,160.70	10,803.50
			Total	121,185.93	15,417.90	105,768.03
			Grand Total	73,082,408.00	20,429,120.00	52,653,288.00

Tip: To return to the **Business Functions** page, click the **Business Functions** link located at the top of the page.

Viewing Provider Qualification

Use the **Provider Qualification** page to view the following results about a POS Provider's qualification:

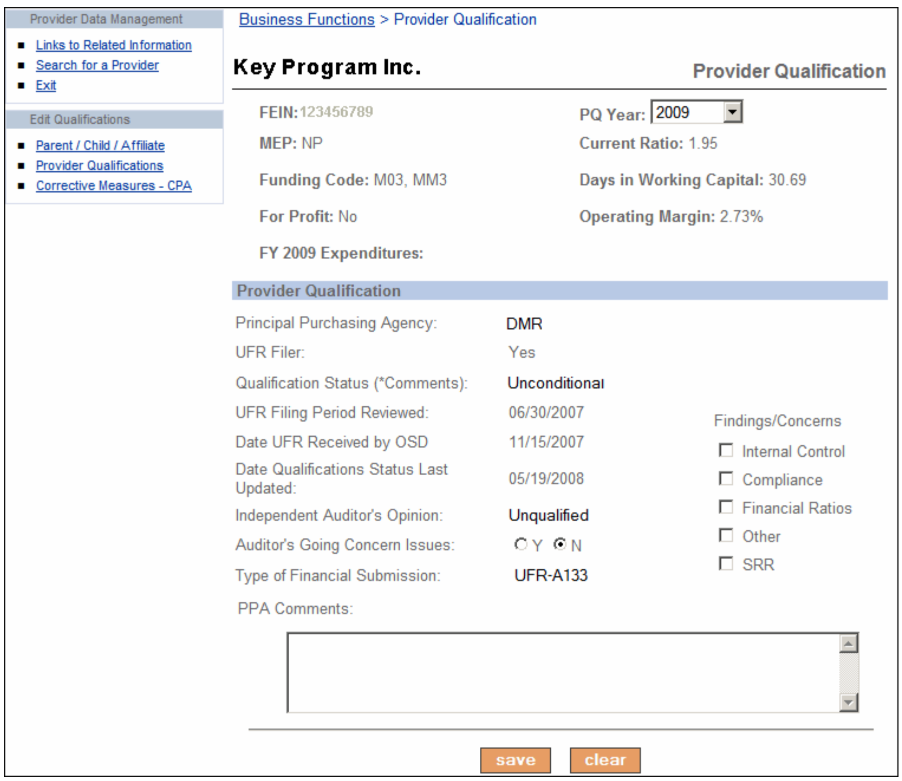
- Principal Purchasing Agency (PPA)
- UFR Filer
- Qualification Status
- UFR Filing Period Reviewed
- Date UFR Received by OSD
- Date Qualification Status Last Updated
- Independent Auditor's Opinion
- Auditor's Going Concern Issues
- Type of Financial Submission
- Findings / Concerns
- PPA Comments

Provider Qualification Page

To access the **Provider Qualification** page, from the **Provider's Business Functions** page, click on the **Qualification** link located under the **Other Business Services** bullet. Then from the **Organization Expenditure Summary** page, go to the left Navigation panel and click on the **Provider Qualification** bullet under the **Edit Qualification** section.

Important: These sections of the **Provider Qualification** page will be populated when the EOHHS Principal Purchasing Agency (PPA) Provider Qualification Officer (PQO) completes the review process.

The following is an *example* of the **Provider Qualification** page.



Tip: To return to the **Business Functions** page, click the **Business Functions** link located at the top of the page.

Viewing Provider (Organizational) Information

Important information to view on this page about the parent provider includes the affiliated organizations and respective funding.

This page identifies the parent organization and all affiliated organizations and respective funding.

Note: The Qualification Status, PPA, and Financial Measure fields will be updated when the parent provider data changes.

Provider Qualifications Page

The following is an *example* of the **Provider Qualification** page.

The **PQ Year** field defaults to the current fiscal year. You can edit the last three fiscal years data or view the last five fiscal years data by selecting the year from the drop down box.

Provider Correspondence

The provider will receive an annual letter by email of the organization's current qualification status and a subsequent letter each time there is a qualification status change.

Editing Provider Qualifications

The PPA Provider Qualification Officer completes the information on this page except for the PPA and UFR Filer status fields. These two fields can *only* be edited by the POS Integrity Unit.

Follow these steps to update new data for **Provider Qualification** information.

1. Enter information in appropriate fields
2. Click the **[Save]** button.

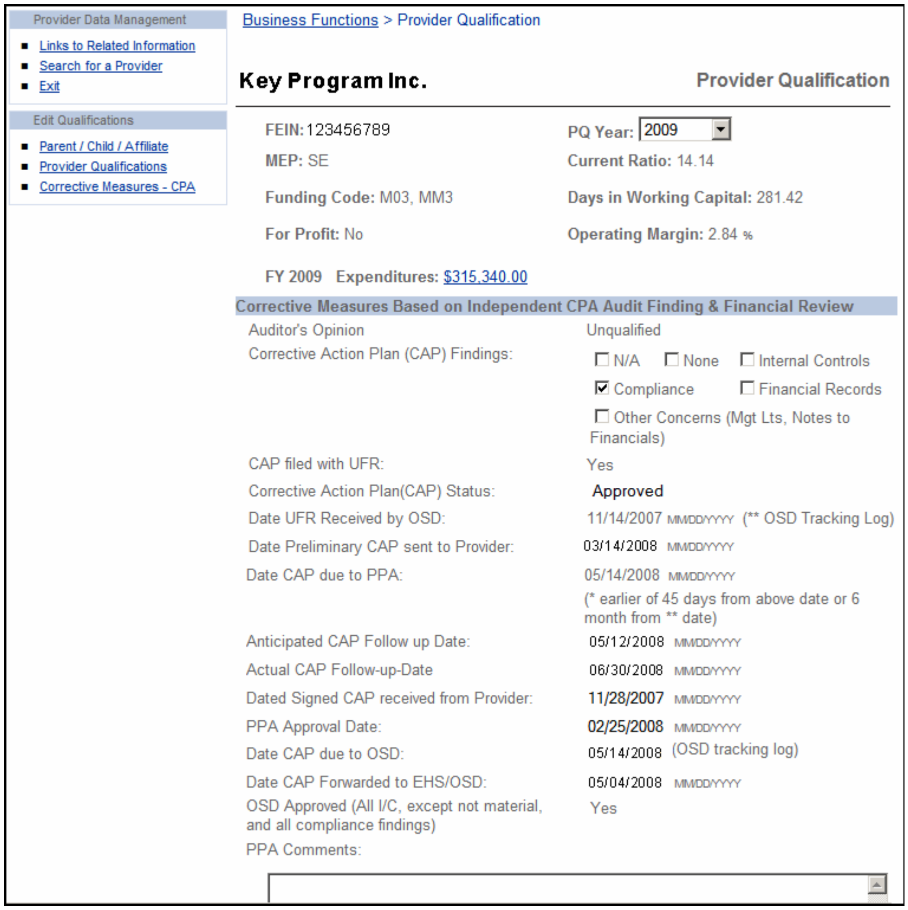
Tips:

- When you click the **Clear** button the modified information is cleared out and the fields are repopulated back to the data that was last saved.
- Be aware that all comments entered can be viewed by the provider.

To return to the **Business Function** page, click the **Business Functions** link located at the top of the page.

Corrective Measures Based on Independent CPA Audit

The following is an *example* of the **Corrective Measures Based on Independent CPA Audit Findings** page.



Provider Data Management
- Links to Related Information
- Search for a Provider
- Exit

Edit Qualifications
- Parent / Child / Affiliate
- Provider Qualifications
- Corrective Measures - CPA

Business Functions > Provider Qualification

Key Program Inc. Provider Qualification

FEIN: 123456789	PQ Year: 2009
MEP: SE	Current Ratio: 14.14
Funding Code: M03, MM3	Days in Working Capital: 281.42
For Profit: No	Operating Margin: 2.84 %

FY 2009 Expenditures: $315,340.00

Corrective Measures Based on Independent CPA Audit Finding & Financial Review

Auditor's Opinion	Unqualified
Corrective Action Plan (CAP) Findings:	☐ N/A ☐ None ☐ Internal Controls ☑ Compliance ☐ Financial Records ☐ Other Concerns (Mgt Lts, Notes to Financials)
CAP filed with UFR:	Yes
Corrective Action Plan(CAP) Status:	Approved
Date UFR Received by OSD:	11/14/2007 MM/DD/YYYY (** OSD Tracking Log)
Date Preliminary CAP sent to Provider:	03/14/2008 MM/DD/YYYY
Date CAP due to PPA:	05/14/2008 MM/DD/YYYY (* earlier of 45 days from above date or 6 month from ** date)
Anticipated CAP Follow up Date:	05/12/2008 MM/DD/YYYY
Actual CAP Follow-up-Date	06/30/2008 MM/DD/YYYY
Dated Signed CAP received from Provider:	11/28/2007 MM/DD/YYYY
PPA Approval Date:	02/25/2008 MM/DD/YYYY
Date CAP due to OSD:	05/14/2008 (OSD tracking log)
Date CAP Forwarded to EHS/OSD:	05/04/2008 MM/DD/YYYY
OSD Approved (All I/C, except not material, and all compliance findings)	Yes
PPA Comments:	

Viewing Financial Measures

The Financial Measures assist agencies in assessing the financial stability of a provider.

The EOHHS Purchase of Service (POS) Integrity Unit established the standard Financial Assessment Measures and benchmarks.

The **Financial Measures** page is pre-populated when the Operational Services Division (OSD) receives a Provider's annual Uniform Financial Report (UFR) and parses the information into the OSD database.

The PPA PQO completes information on this page.

Follow theses steps to update, enter new data for **Corrective Measures Based on Independent CPA Audit Findings** information.

1. Enter information in appropriate fields.
2. Click the **[Save]** button.

Tips:

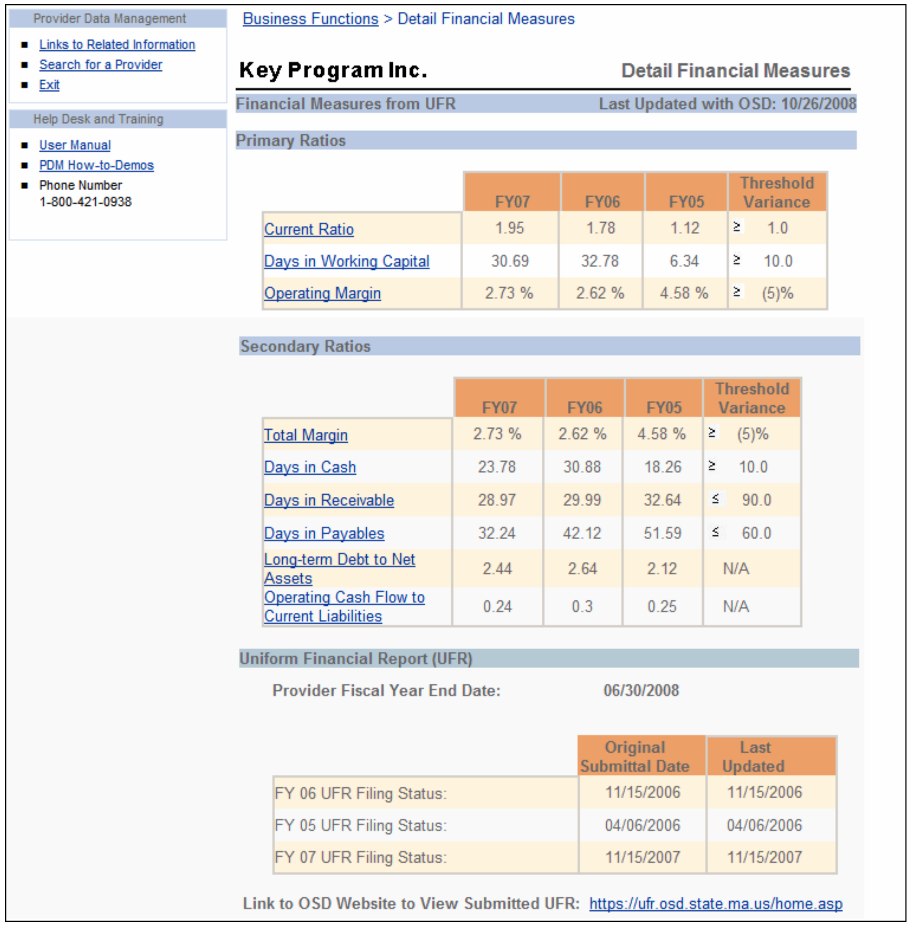
- When you click the **Clear** button the modified information is cleared out and the fields are repopulated back to the data that was last saved.
- Be aware that all comments entered can be viewed by the provider.

To return to the **Business Function** page, click the **Business Functions** link located at the top of the page.

Detail Financial Measures page

Access the **Detail Financial Measures** page by clicking the **Financial Measures** link from the **Business Functions** page. The following is an *example* of the **Detail Financial Measures** page.

Note: The last three fiscal years data displays in PDM.



Provider Data Management

- Links to Related Information
- Search for a Provider
- Exit

Help Desk and Training

- User Manual
- PDM How-to-Demos
- Phone Number 1-800-421-0938

Business Functions > Detail Financial Measures

Key Program Inc. Detail Financial Measures

Financial Measures from UFR Last Updated with OSD: 10/26/2008

Primary Ratios

	FY07	FY06	FY05	Threshold Variance
Current Ratio	1.95	1.78	1.12	≥ 1.0
Days in Working Capital	30.69	32.78	6.34	≥ 10.0
Operating Margin	2.73 %	2.62 %	4.58 %	≥ (5)%

Secondary Ratios

	FY07	FY06	FY05	Threshold Variance
Total Margin	2.73 %	2.62 %	4.58 %	≥ (5)%
Days in Cash	23.78	30.88	18.26	≥ 10.0
Days in Receivable	28.97	29.99	32.64	≤ 90.0
Days in Payables	32.24	42.12	51.59	≤ 60.0
Long-term Debt to Net Assets	2.44	2.64	2.12	N/A
Operating Cash Flow to Current Liabilities	0.24	0.3	0.25	N/A

Uniform Financial Report (UFR)

Provider Fiscal Year End Date: 06/30/2008

	Original Submittal Date	Last Updated
FY 06 UFR Filing Status:	11/15/2006	11/15/2006
FY 05 UFR Filing Status:	04/06/2006	04/06/2006
FY 07 UFR Filing Status:	11/15/2007	11/15/2007

Link to OSD Website to View Submitted UFR: https://ufr.osd.state.ma.us/home.asp

Tip: To return to the **Business Functions** page, click the **Business Functions** link located at the top of the page.

Notes:

Chapter 6: Updating Provider Information

Introduction

PDM allows Providers to update information. The following information can be updated within *PDM*:

- Provider General Information
- Existing Services your organization provides
- Services offered but not contracted through EOHHS

Overview

Use the **Update General Information** page to enter or update information about your organization.

You can enter or edit the following information:

- Alternate Corporate Mailing Address information
- Executive Contact Information
- Contact Information
- Provider Data Management Contact Information
- General Corporate Information
    - Mission Statement
    - Corporate Description

Updating General Information

Note: All fields with a red asterisk are required.

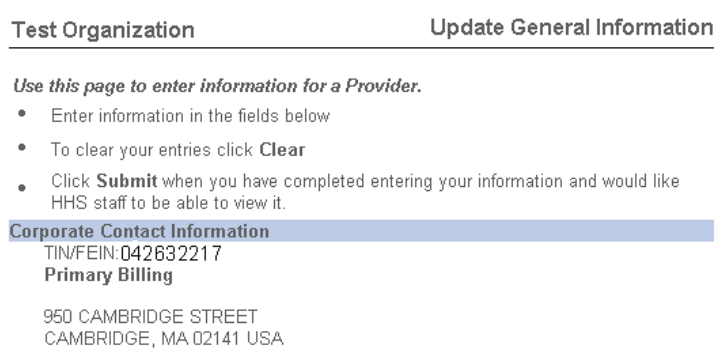
Tip: The Primary Address is pre-populated and sourced directly from the Commonwealth Information Warehouse.

Follow these steps to update provider general information.

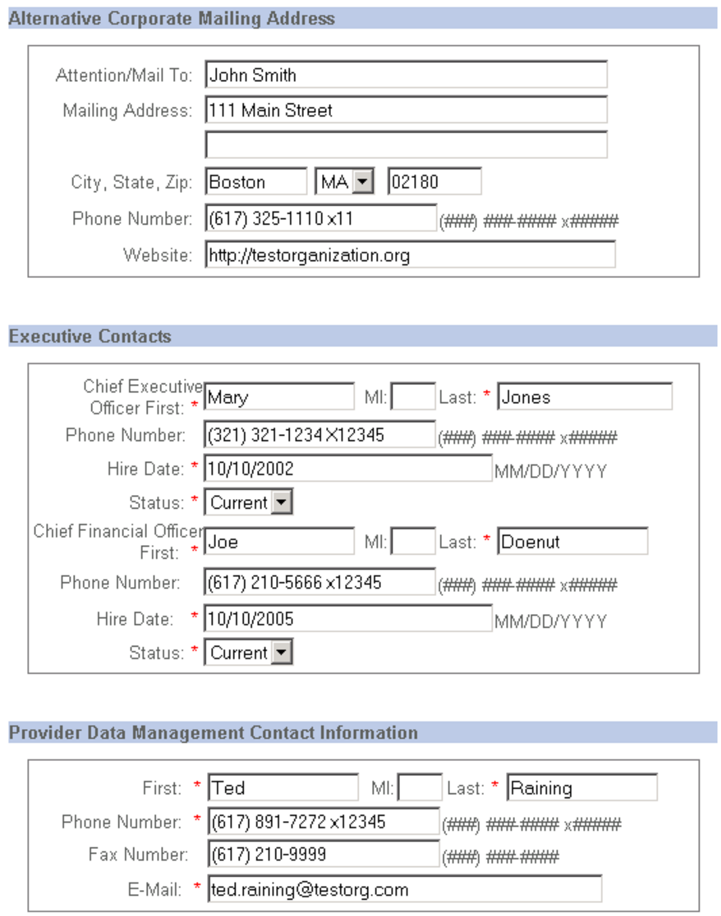
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

From the **Provider Business Functions** page, click the **General Information** link located under the **Update Provider Information** bullet.

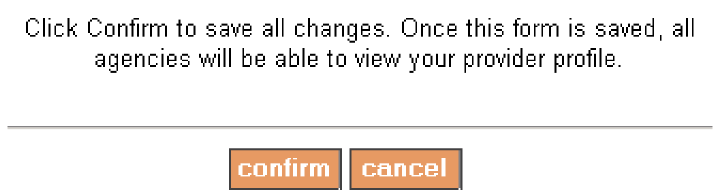
Result: *The* ***Update General Information*** *page appears.*



</td></tr>
</table>

Step	Action
2	To update, enter new information in the appropriate fields. ***Tip:*** Hints display next to the phone number and hire date fields to guide you in entering the data correctly. 

Note: When the CEO or CFO Hire Date or Status information is updated the *PDM* Contact and the Agencies that are contracted with this provider will be notified by e-mail.

Step	Action
3	If you click **Clear**  , the new information is cleared out and the page repopulates with the data that was last saved. **OR** To upload entered or updated information to *PDM*, click **Submit**.  If there is required information that is missing or incomplete a message pop-up message appears.  Click **OK**. You will be directed to the field you are missing information to complete. **OR** The **Confirmation** page appears.  Click the **Confirm** button to save all changes. ***Result:*** *The session is saved and updated provider general information is stored in PDM. Once this form is saved, it will become immediately viewable in PDM to all users.* *After clicking confirm, you are redirected to the* ***General Information Detail*** *page to the section of the information that was just updated or entered for the first time.*

Step	Action
3	**OR** If you click **Cancel**  you are returned to the **Update General Information** form with the changes displayed on the page. No data has been saved and is not available at all to view. ***Tip:*** To return to the Provider Business Functions page, click the Business Functions link at the top of the page.

Updating Provider Services Available for Purchase

You can use the **Update Services Provided** page to:

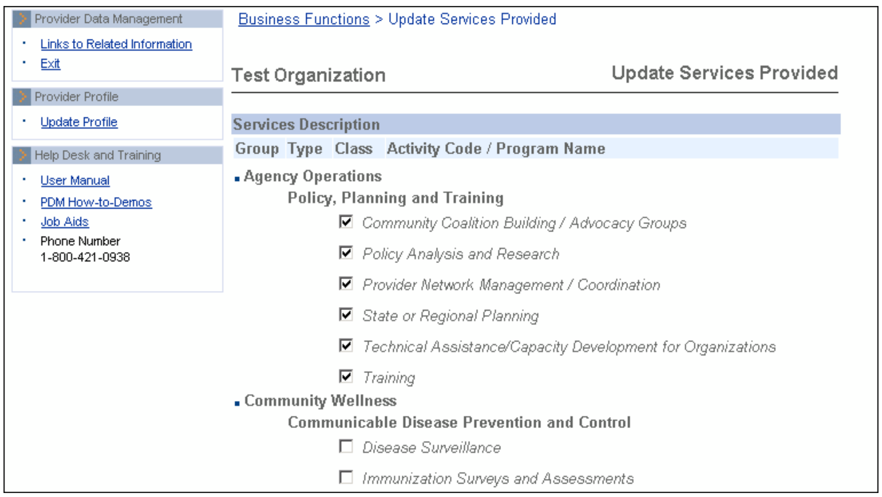
- Update existing services your organization provides
- Update services that you may provide but do not have an active contract with EOHHS for these services.

Note: A way to think of the **Update Services Provided** page is as an advertisement section to market your services to EOHHS agencies.

Update Services Provided Page

This is an example of the **Update Services Provided** page.

- SAMPLE -



Updating Services Provided

Note: The Update Services Not Currently Provided to the Commonwealth page is not required to be completed by the provider.

Follow these steps to update provider services.

Step	Action
1	From the **Provider Business Functions** page, click the **Services Available for Purchase** link located under the **Update Provider Information** bullet.
2	Click the check boxes to update existing services provided or to indicate new services provided.
3	Click **Save**. save ***Result:*** *The taxonomy information is updated in PDM. After clicking* ***Save*** *you are redirected to the* ***View Services Provided Detail*** *page.* **OR** If you click **Clear** clear, the new information is cleared out and the page repopulates with the data that was last saved. ***Tip:*** To return to the Provider Business Functions page, click the Business Functions link at the top of the page.

Notes:

Chapter 7: Required Forms and Documents

Introduction

Both Provider and Agency users can use the view required forms and documents on file.

Providers will now be able to submit required forms and documents to EOHHS by using the *PDM* service.

This chapter contains the following topics:

- Accessing Required Forms and Documents page
- Viewing Information
- Available Forms and Documents
- Downloading Templates
- Completing Required Forms and Documents
- Saving and Naming the Completed Document
- Accessing the Update Required Forms and Documents page
- Uploading Required Forms and Documents
- Updating Required Forms and Documents
- Deleting Required Forms and Documents

Accessing the View Required Forms and Documents Page

Use the **View Required Forms and Documents** page to see which forms and documents are on file.

You can access the **View Required Forms and Documents** page from the **Provider Business Functions** page.

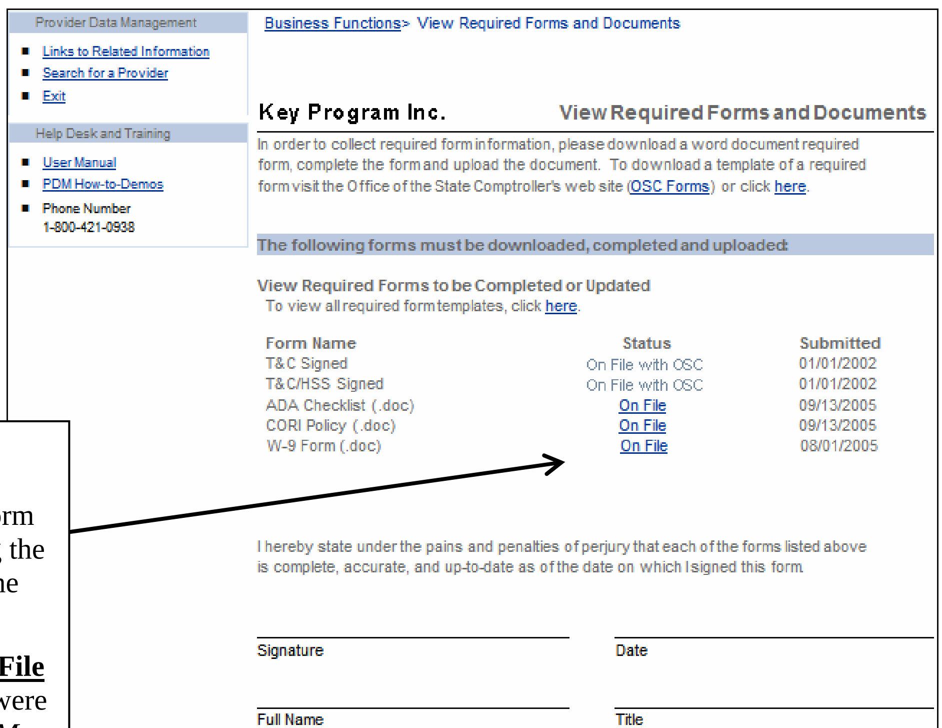
User Role	Link
Provider User – View Only	Click **Required Forms and Documents** under **Other Business Services**. 

<table>
<tr><th>User Role</th><th>Link</th></tr>
<tr><td>Provider User – Update</td><td>Click Required Forms and Documents under View Information Summary.


</td></tr>
</table>

Required Forms and Documents Page

The following is an ***example*** of the **View Required Forms and Documents** page.



Screen Tip

View a specific form on file by clicking the **On File** link for the Status

The status of **On File** means the forms were uploaded to *PDM*.

Tip: The **Go to Update Required Forms** link will only appear if you have update access. This link directs users with update access to the

	Update Required Forms and Documents page.
Viewing Information	All uploaded forms can be viewed online; both the Commonwealth Terms and Conditions and the Health and Human Services Terms and Conditions only have available their status and the date of submission. These fields are sourced from MMARS – CIW.

Function	Action
To view the information about a form unavailable online	Review the Status column on **View Required Forms and Documents** page.
To view a form or document available online	Click the link next to the form or document you want to review.

Note: This page includes a signature section that will be used by providers to confirm that all forms uploaded to *PDM* are up to date. When specified in a Request for Response (RFR), this page can be printed, signed, and submitted as part of the new RFR process. Refer to RFR document for specific submittal requirements.

Available Forms and Documents

The following table lists the blank forms and documents that are available to view and download on *PDM.*

Standard Forms and Documents	Availability on PDM
T & C form	Status and date only
ADA Checklist	View form/document
Standard Forms and Documents	**Availability on PDM**
Affirmative Action Plan	View form/document
Business Reference Form	View form/document
CORI Policy	View form/document
Disciplinary Policy	View form/document

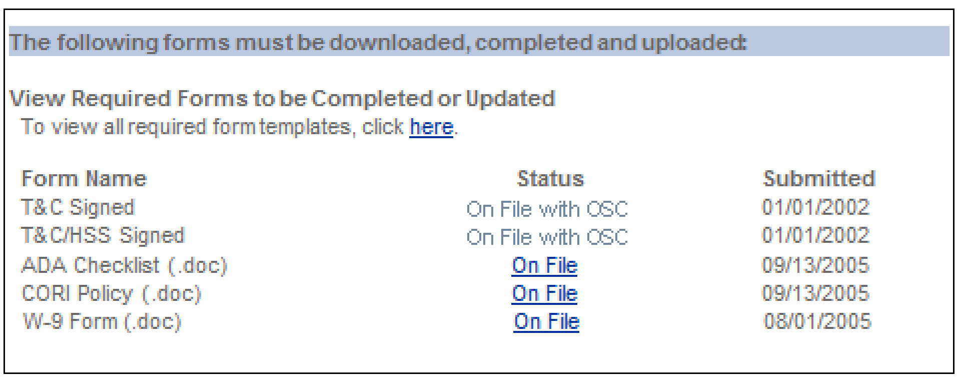
Human Rights Policy	View form/document
Personnel Policy	View form/document
Provider's Training Policy	View form/document
Massachusetts Substitute W-9 Form	View form/document

Downloading Templates

Templates for most required forms and documents can be downloaded from *PDM* **Required Forms List** page. Other templates are available through links to pages at OSC and OSD websites.

Access the Required Forms list page by clicking the **here** link.

- SAMPLE -



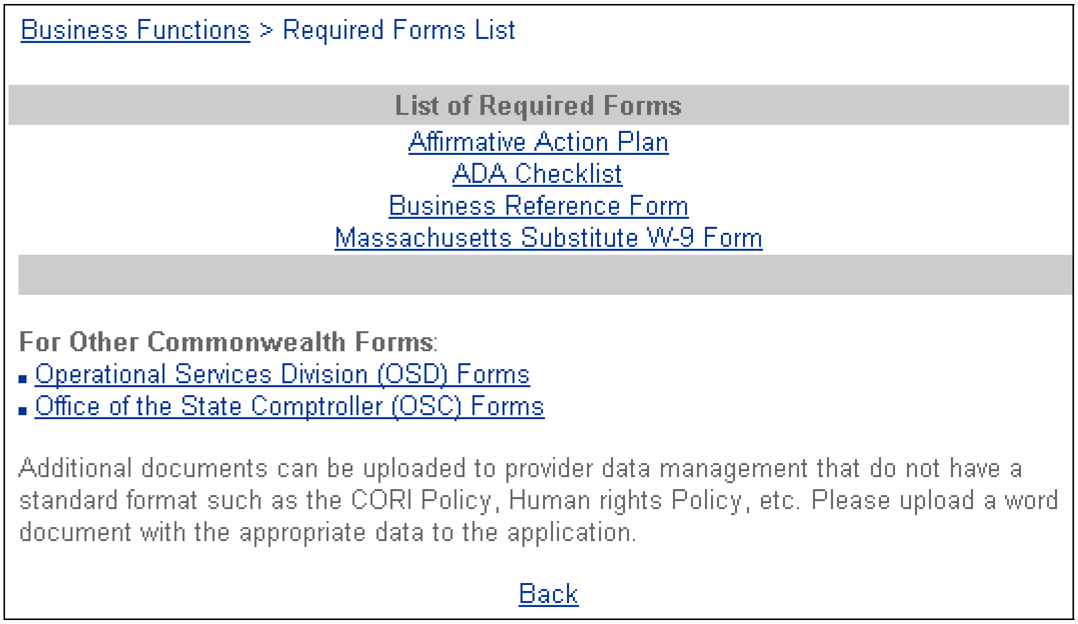
The following forms must be downloaded, completed and uploaded:

View Required Forms to be Completed or Updated

To view all required form templates, click here.

Form Name	Status	Submitted
T&C Signed	On File with OSC	01/01/2002
T&C/HSS Signed	On File with OSC	01/01/2002
ADA Checklist (.doc)	On File	09/13/2005
CORI Policy (.doc)	On File	09/13/2005
W-9 Form (.doc)	On File	08/01/2005

The following is a sample of the **Required Forms List** page, from which you can download most templates.



Business Functions > Required Forms List

List of Required Forms

Affirmative Action Plan
ADA Checklist
Business Reference Form
Massachusetts Substitute W-9 Form

For Other Commonwealth Forms:

- Operational Services Division (OSD) Forms
- Office of the State Comptroller (OSC) Forms

Additional documents can be uploaded to provider data management that do not have a standard format such as the CORI Policy, Human rights Policy, etc. Please upload a word document with the appropriate data to the application.

Back

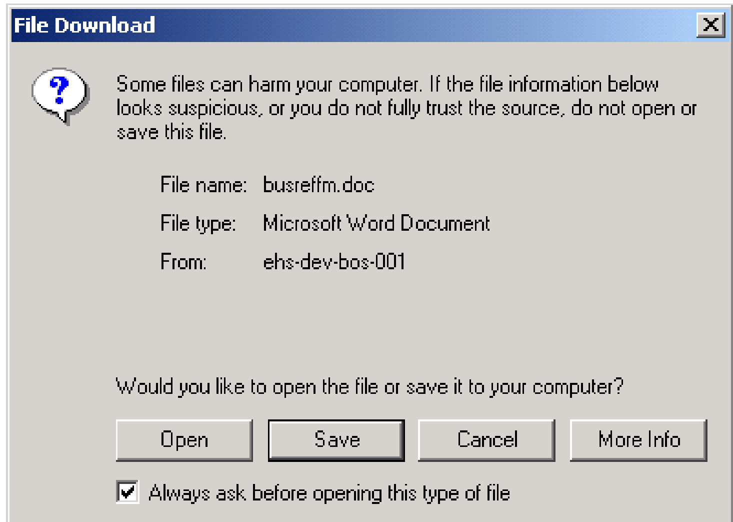
Following is a list of the templates available and the site from which they can be downloaded.

Template	Download from….
Affirmative Action Plan	PDM
ADA Checklist	PDM
Business Reference Form	PDM
Massachusetts Substitute W-9	PDM

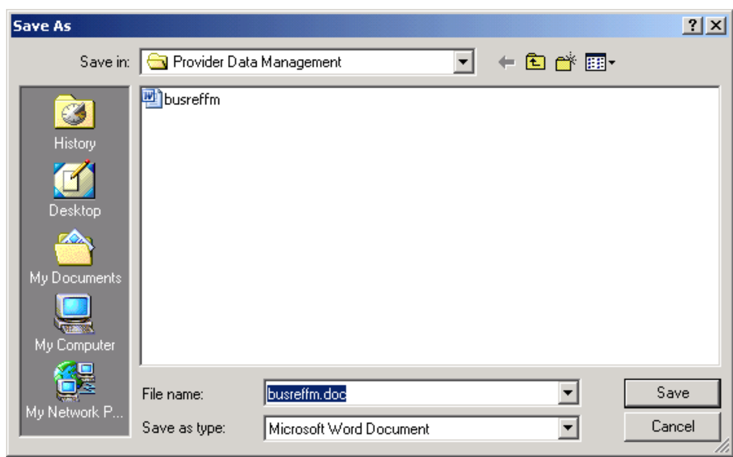
Follow these steps to download a template.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the name of the required form.

Result: A dialog box appears, asking whether you want to Open or Save the file.

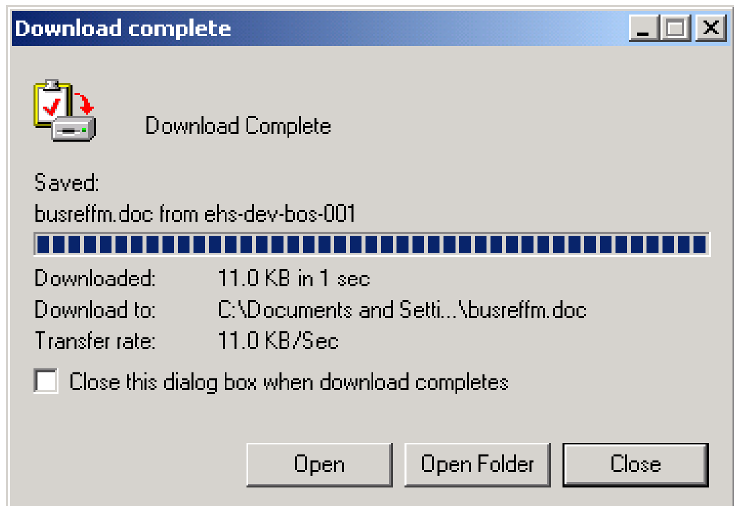

</td></tr>
<tr><td>2</td><td>Click Save.

Result: A Save As…dialog box appears.


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Type the file name and navigate to the location where you want the file. Click Save.

Result: After a moment, a Download Complete dialog box appears.


</td></tr>
<tr><td>4</td><td>Click Close to close the Download dialog box.

Result: The file has been saved onto your computer.</td></tr>
</table>

Completing Required forms and Documents

Once the templates for required forms and documents are saved onto your computer, you can complete them for your organization using Microsoft Word.

When completed and saved, users with update access can upload forms and documents to *PDM*. (see next section).

Saving and Naming the Completed Document

Save the documents as PDF or Microsoft Word files.

Use the following naming conventions before uploading.

Document	Name
Affirmative Action Plan	aaplan.doc or aaplan.pdf
ADA Checklist	ada checklist.doc or ada checklist.pdf
Business Reference Form	busreffm.doc or busreffm.pdf
CORI Policy	cori_policy.doc or cori_policy.pdf
Disaster Plan	disaster.doc or disaster.pdf
Disciplinary Policy	disc_policy.doc or disc_policy.pdf
Human Rights Policy	human_rights.doc or human_rights.pdf
Personnel Policy	personnel.doc or personnel.pdf
Provider's Training Policy	training.doc or training.pdf
W-9	w-9.doc or w-9.pdf

Uploading Required Forms and Documents Introduction

Important: The upload functionality is only available to Provider users with update access.

Once a form or document is completed, you can upload it to *PDM*.

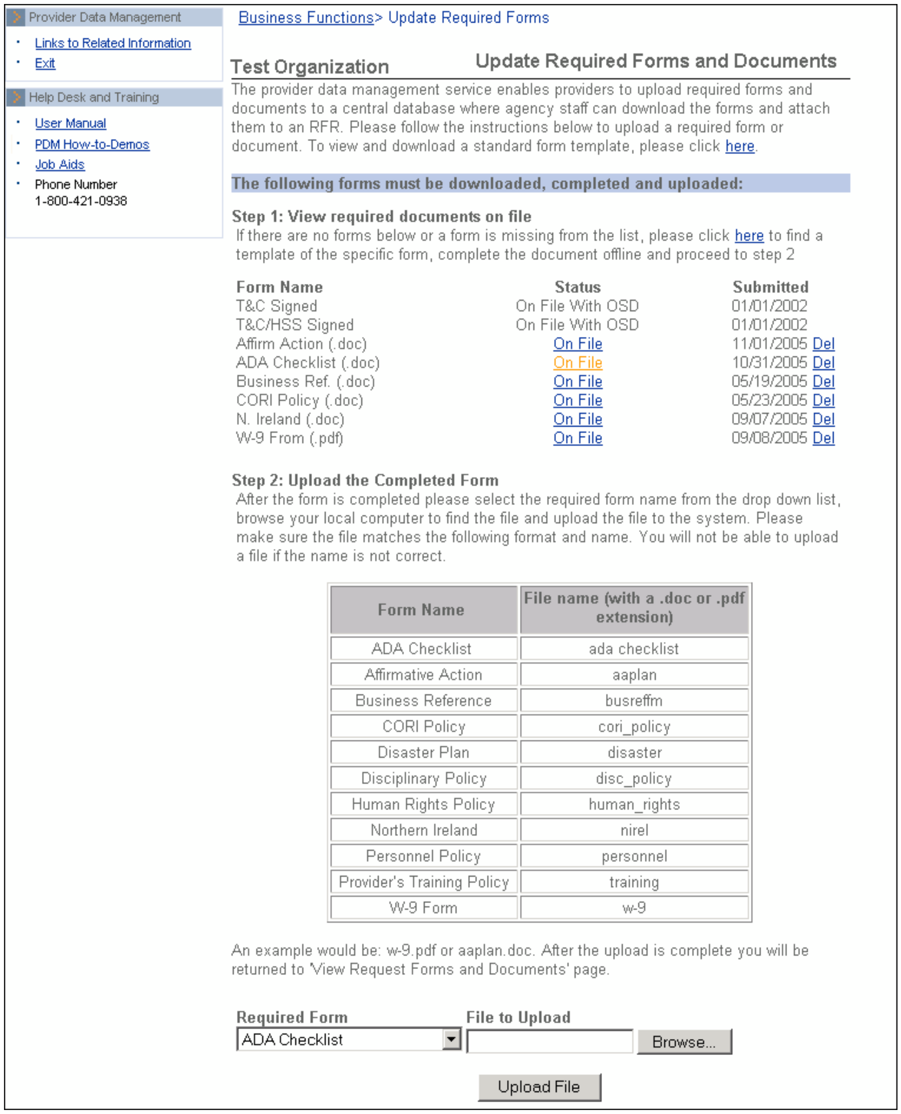
Note: Make sure the file is a Microsoft Word or PDF document, named according to the conventions in the last section.

Accessing the Update Required Forms and Documents Page

To access the **Update Required Forms and Documents** page, from the **Provider Business Functions** page, under **Update Provider Information**, click **Required Forms and Documents** link.

Update Required Forms and Documents Page

The following is an example of the **Update Required Forms and Documents** page.



Provider Data Management
- Links to Related Information
- Exit

Help Desk and Training
- User Manual
- PDM How-to-Demos
- Job Aids
- Phone Number 1-800-421-0938

Business Functions> Update Required Forms

Test Organization — Update Required Forms and Documents

The provider data management service enables providers to upload required forms and documents to a central database where agency staff can download the forms and attach them to an RFR. Please follow the instructions below to upload a required form or document. To view and download a standard form template, please click here.

The following forms must be downloaded, completed and uploaded:

Step 1: View required documents on file
If there are no forms below or a form is missing from the list, please click here to find a template of the specific form, complete the document offline and proceed to step 2

Form Name	Status	Submitted
T&C Signed	On File With OSD	01/01/2002
T&C/HSS Signed	On File With OSD	01/01/2002
Affirm Action (.doc)	On File	11/01/2005 Del
ADA Checklist (.doc)	On File	10/31/2005 Del
Business Ref. (.doc)	On File	05/19/2005 Del
CORI Policy (.doc)	On File	05/23/2005 Del
N. Ireland (.doc)	On File	09/07/2005 Del
W-9 From (.pdf)	On File	09/08/2005 Del

Step 2: Upload the Completed Form
After the form is completed please select the required form name from the drop down list, browse your local computer to find the file and upload the file to the system. Please make sure the file matches the following format and name. You will not be able to upload a file if the name is not correct.

Form Name	File name (with a .doc or .pdf extension)
ADA Checklist	ada checklist
Affirmative Action	aaplan
Business Reference	busreffm
CORI Policy	cori_policy
Disaster Plan	disaster
Disciplinary Policy	disc_policy
Human Rights Policy	human_rights
Northern Ireland	nirel
Personnel Policy	personnel
Provider's Training Policy	training
W-9 Form	w-9

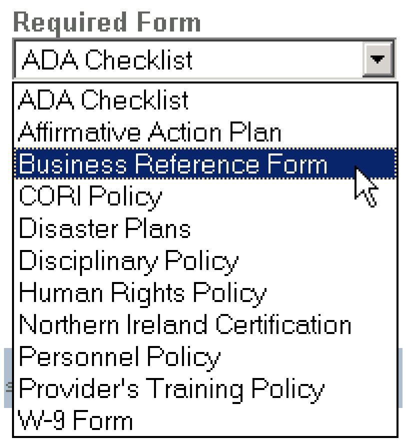
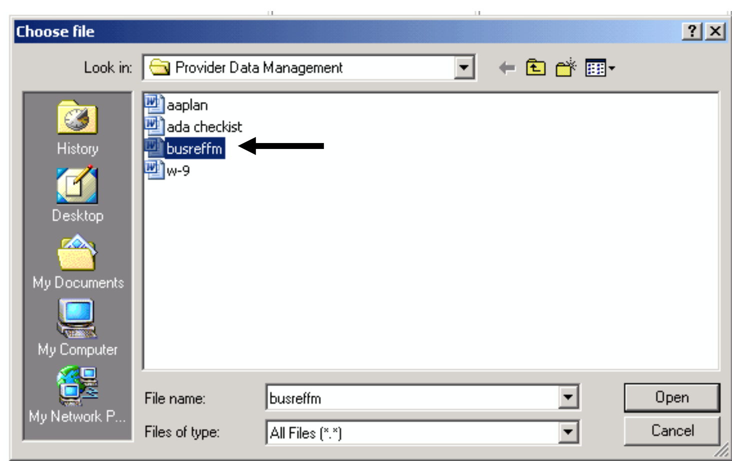
An example would be: w-9.pdf or aaplan.doc. After the upload is complete you will be returned to 'View Request Forms and Documents' page.

Required Form: ADA Checklist
File to Upload: Browse...

Upload File

Uploading Required Forms and Documents

Follow these steps to upload a document.

Step	Action
1	Select correct form from the Required Form drop-down list. 
2	Click **Browse…**button to locate file on your computer.  ***Result:*** *A* ***Choose File*** *dialog box appears.* 

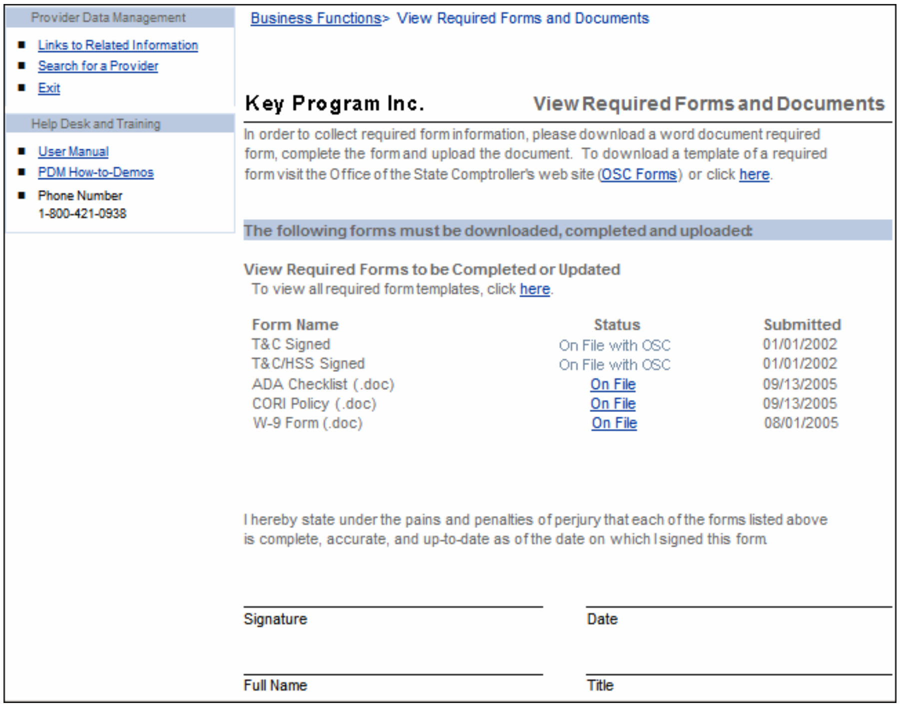
Step	Action
3	Locate and select the file. Click **Open**.
4	Click **Upload**.  ***Result:*** *The* ***View Required Forms and Documents*** *page is displayed.*

Important: The upload functionality is only available to Provider users with update access. Other users can download and update required forms, but cannot upload them to *PDM*.

Use the following steps to update required forms and documents that you have previously uploaded to *PDM*.

Step	Action
1	Access existing file. If you have saved a copy on your Computer, you can use that file. You can also download the file from PDM.
2	Update and edit file. When saving, refer to naming conventions in this chapter **Completing Forms and Documents**.
3	Upload to *PDM*; refer to the procedure in this chapter **Uploading Required Forms and Documents**. ***Result:*** *The new uploaded file replaces the existing file and you are redirected to the* ***View Required Forms and Documents*** *page with the updated form listed.*

Deleting Required Forms and Documents



Step	Action
1	Choose a file.
2	Click the Delete hyperlink **<u>Del</u>** located next to the required form that is to be deleted. ***Result:*** *The form is removed from the database and you are redirected to the* ***View Required Forms and Documents*** *page with the deleted form no longer listed.*

Notes: