

PROVIDER DATA MANAGEMENT USER GUIDE



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COMMONWEALTH OF MASSACHUSETTS

The Executive Office of Health and Human Services

INFORMATION TECHNOLOGY (IT) VIRTUAL GATEWAY (VG)

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Chapter 1: Virtual Gateway's Provider Data Management (PDM) System

OVERVIEW

The Virtual Gateway is an Internet portal designed by the Executive Office of Health and Human Services (EOHHS) to provide the general public, medical providers, community-based organizations, and EOHHS staff with online access to health and human services. By consolidating information and online services in a single location on the Internet, the Virtual Gateway simplifies the process of connecting people to critical health and human services programs and information.

Provider Data Management is a web-based service that gives Purchase of Service (POS) providers and EOHHS agencies a single place to view and edit information commonly requested by Health and Human Services agencies. The Provider Data Management System is a web based EOHHS application that supports:

1. State agencies within the Executive Office of Health and Human Services through a centralized location to view provider information required for contracting monitoring.
2. Provider organizations with whom EOHHS agencies contract by hosting a central repository of all Purchase of Service (POS) contracts, service data, forms and reports, and organizational profiles.
3. Annual Provider Qualification review process aimed at minimizing financial and administrative risk to the Commonwealth and the people served through the Purchase of Service system.
4. Creation of specialized reports and service directories designed to meet federal funding requirements and assist general public in identifying service providers.
5. Special initiatives undertaken by the EHS to meet legislative directives.

The PDM Business Service is intended to serve as a well-organized, 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.

PDM is an application built to manage providers servicing the Purchase of Service (POS) provider population. This enhanced functionality will support enrolling provider agencies and individual providers to provide different waiver program services.

Provider Management allows individual providers and provider agencies access to update their demographic information; and manage their services and qualifications in the system. Certain business rules apply in order to modify service related information especially when they are part of an existing plan and are currently providing services to consumers. Provider initiated service modifications and additions go through a review and approval process by the reviewers.

The Provider Data Management system has four primary pages.

- **Information:** The Information page stores information about a Provider such as Corporate Contact Information, Provider’s PDM Contact, Executive Contact, and general corporate information (Mission Statement and Corporate Description).
 - **Service Directory:** Service Directory (SD) is a tool developed by the Massachusetts Department of Developmental Services (DDS) to assist individuals, families, support brokers, and clinical staff to locate services and service providers in the Commonwealth of Massachusetts. The SD helps clients to locate particular service providers, search for services and supports provided in their community and provide information about specific services funded by the Department of Developmental Services (DDS) under the Home and Community - Based Services Waivers.
 - Service Directory will appear as a link on the Information page to Providers who have contracts/services with the Department of Developmental Services (DDS).
 - Visit the Service Directory page to find services and supports for clients and/or their family member. (<https://service.hhs.state.ma.us/pdm4public/ssdHome.jsp>)
- **Qualification:** The Qualification page stores information about the POS Provider’s qualifications such as Principle Purchasing Agency (PPA), Qualification Status, UFR Filing Period reviewed, Date UFR Received by OSD, Date Qualification Status Last Updated, Concerns/Issues, and Comments. The Qualification Page has two links:
 - **Financial Ratios:** The Financial Ratios page assists 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 Ratios 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.
 - **Corrective Measures:** The Corrective Measures page displays, by PQ Fiscal Year, the UFR Audit Findings, the Corrective Action Plan, and Audit Records (OSA Audit).
- **Contract Detail:** The Contract Detail page stores information about the POS Provider’s contracts for the current fiscal year such as Activity Code, Activity Name, Doc ID, Object Code, Maximum Contract Obligation, Expended to Date, and Unexpended Amount. For Release 5.0 PDM will only display contracts with Object Codes MM3 and M03.

Note: The information found under the Contract Details tab is sourced from the Commonwealth’s Information Warehouse. Information about services offered, but not contracted through EOHHS is entered by the provider.
- **Surplus Revenue:** The Surplus Revenue page is primarily used by the Principal Purchasing Agency (PPA) to record and retain an account of the surplus revenue liability based on the Annual SSR of 5% limit.

Security roles determine what a user can view and edit in PDM. Refer to **Appendix B: PDM Security Matrix** for a listing of security roles.

More information about PDM can be found via the EOHHS Virtual Gateway: www.mass.gov/vg/pdm.

SYSTEM 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 the following.

- Windows (2000 or XP Professional)
- Internet Explorer 7.0 or 8.0
- 1280x960 screen resolution
- 300MHz CPU and 128MB RAM

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

- Windows XP Professional
- 1440x900 screen resolution
- 500MHz CPU and 256MB RAM

Acceptable Alternatives:

- Browsers: Firefox
- Compatible with Dragon and JAWS

Note: Java Script is required and must be enabled to use the PDM application. To enable JAVA Script, follow the steps below.

Enable JAVA scripting on IE 7.0, IE 8.0

- From the **Tools** menu, or the **Tools** drop-down in the upper right, choose Internet options.
- Click the **Security** tab, and then click **Custom Level**.
- Scroll to the “**Scripting**” section of the list. For “**Active Scripting**,” click **Enable**.
- Click **OK**, and confirm if prompted.
- Close and restart your browser.

Enable JAVA scripting on Firefox

- From the **Tools** menu, select **Options**.
- Click **Content**.
- Check or uncheck **Enable Java Script** and **Enable Java**.

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

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

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Chapter 2: Getting Started

ACCESSING PDM ON THE VIRTUAL GATEWAY (VG)

Select the link: [Virtual Gateway Login Assistance Page](#) for more information on accessing the Virtual Gateway.

1. To use the Virtual Gateway's PDM system, users must log on to the Virtual Gateway at <https://gateway.hhs.state.ma.us/authn/login.do>.

Welcome to the Virtual Gateway

Login

Username

Password (Case sensitive)

[Forgot Password](#)

Virtual Gateway Customer Service

Monday through Friday
8:30 am to 5:00 pm
800-421-0938 (Voice)
617-847-6578 (TTY for the deaf and hard of hearing)

Important Messages

When logging in, you may be required to change your password and update your user profile.
For assistance with logging in, please visit www.mass.gov/vg/loginassistance.

Figure 1: Welcome to the Virtual Gateway page.

From the **Welcome to the Virtual Gateway** page:

2. Enter your VG Username and Password.

From the **VG Business Service** page:

3. Select the **Provider Data Management** link.

Figure 2: Virtual Gateway Business Service page.

Notes:

- If logging on for the first time, refer to your New User Email for Username and temporary password.
- Refer to the [Virtual Gateway Login Assistance \(http://www.mass.gov/eohhs/provider/training-and-edu/vg/login-help-for-providers-and-state-agency-staff.html\)](http://www.mass.gov/eohhs/provider/training-and-edu/vg/login-help-for-providers-and-state-agency-staff.html) page for additional guidance on logging on to the Virtual Gateway and account maintenance.

PDM Welcome Page

The **Welcome to the Provider Data Management Information System** page appears.

Figure 3: Welcome to the Provider Data Management Information System page.

The options available from the PDM Home Page are briefly described in the table below:

Menu Option	Description
Manage Provider	This option will redirect the user to the applicable page based on the assigned security role of the user and allow user to view qualified provider information about the current services that are being provided.
Help	This option will redirect the user to the PDM User Guide documentation. This documentation is available in Word and PDF format.
Logoff	Exits PDM and redirects the user to the Virtual Gateway Home Page.

Virtual Gateway Customer Service

The Virtual Gateway Customer Service provides login and technical assistance to providers and state Agency staff.

If you have questions on accessing PDM on the Virtual Gateway, contact Virtual Gateway Customer Service for assistance.

- 800-421-0938 (Voice)
- 617-847-6578 (TTY for people who are deaf, hard of hearing, or speech disabled)
- Monday through Friday (8:30 a.m. to 5:00 p.m.)

Questions about the PDM Program

If you have any questions regarding PDM or this application please contact the PDM project office via EHS-DL-PDMITeam@MassMail.State.MA.US.

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Chapter 3: Principal Purchasing Agency (PPA) and Agency Observer Roles

OVERVIEW

Principal Purchasing Agency (PPA): The Principal Purchasing Agency (PPA) role allows agency staff to edit and view provider information. This role can also enter information that supports the POS provider evaluation and annual prequalification process; and access predefined agency reports.

Agency Observer: This role allows designated agency staff to view only Provider information and access predefined reports.

PDM Role	Information	Qualifications (Including Financial Ratio and Corrective Measures)	Contract Detail	Surplus Revenue
Principal Purchasing Agency (PPA)	View	View/Edit	View	View/Edit
Agency Observer	View	View	View	View

Reminders When Using PDM:

- All fields denoted with an asterisk (*) are required fields and must be completed in order to save the record.
- Do not save a record until all sections are completed. If the user tries to save before completing all required fields within each section, the user will receive error messages at the top of the page listing the missing data.
- If you attempt to navigate to another page while in **Edit** mode without first saving you will receive a warning message (different text depending on the web browser you are working in) such as:
 - **Firefox:** "This page is asking you to confirm that you want to leave – data you have entered may not be saved."
 - **Internet Explorer:** "Are you sure you want to navigate away from this page? This page is asking you to confirm that you want to leave – data you have entered may not be saved. Press OK to continue, or Cancel to stay on the current page."

For guidance on using JAWS with PDM, refer to **Appendix B: JAWS Commands**.

PROVIDER SEARCH

The Principal Purchasing Agency (PPA) and Agency Observer both have the ability to search for providers. It is important to know how to search for providers within the database. The search page allows the user to search for an existing Provider in order to manage or view (dependent on role) an existing provider who is active for the current PQ year and who has had a contract with the Commonwealth in the past five years.

Using a name, FEIN or an alphabetical listing the search engine conducts a search of the database to display a provider's profile.

The Search page is accessed by selecting Manage Provider from the Navigation menu.

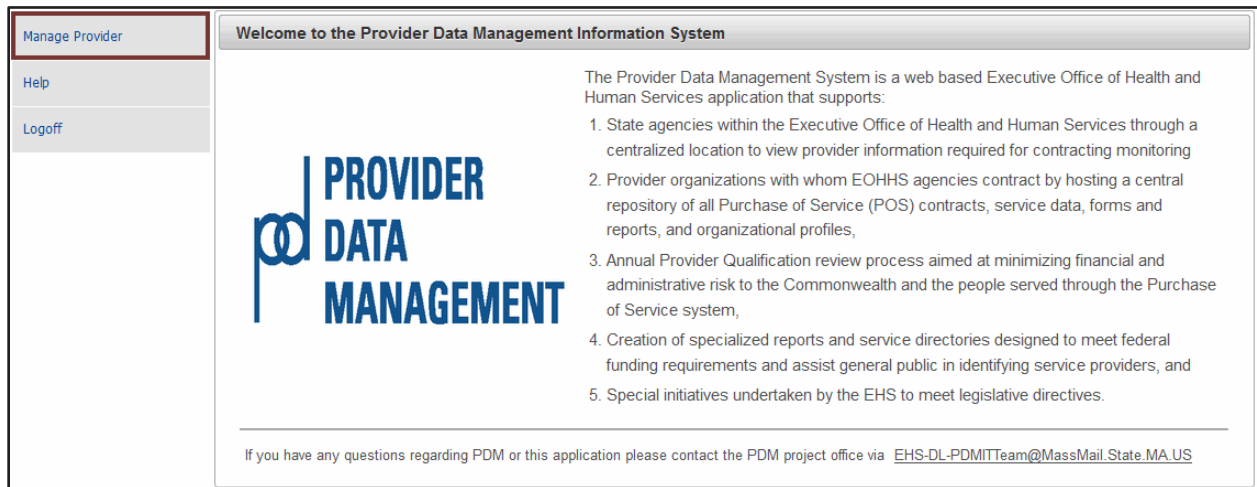


Figure 4: Welcome to the Provider Data Management System page.

The **Provider Search** page allows users to search for entries in two ways:

- **Search By Provider**
- **Search Alphabetically**

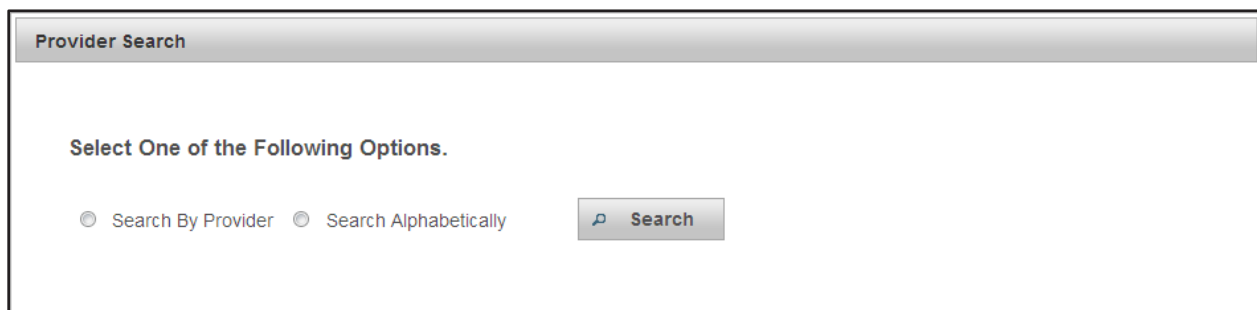


Figure 5: Provider Search page.

Search By Provider

1. Select the **Search By Provider** radio button.
2. Select the **Search** button.

Provider Search

Select One of the Following Options.

Search By Provider Search Alphabetically

Figure 6: Searching by Provider option.

Note: The **Provider Search** page allows users to search for records in three ways. Users can search by using one option or a combination of options.

- **FEIN** (Federal Employment Identification Number)
- **Name** (Provider Name)
- **PPA** (Principal Purchasing Agency)

1. Type the **Name**. (Full or Partial name).

There are three buttons under the **Provider Search** section:

- **Search:** To conduct a search per entered criteria.
- **Clear:** To clear criteria from fields.
- **Return:** To return to the Search option page.

2. Select the **Search button**

The Provider Search page returns with results based off of entered criteria.

Provider Search

FEIN

NAME

PPA

Provider Search

Select provider below

Name	FEIN	PPA
Catherine E. Key	900174165	DCF
Key Program, Inc.	042539878	DPH

Figure 7: Provider Search page returns with results based off of entered criteria.

Note: Wildcard Search, the * (asterisk) can be used as a wildcard in the name field to search for a provider. If you are unsure of the full name of the provider, or want to see all the options using a portion of a name, use the wild card to search. (i.e. ***key** will produce *Catherine Key*, **Berkshire*** will produce *Berkshire Community Center* etc., ***education*** will produce any provider who has the word *education* in their organization name.)

3. Select record to view. The user will be redirected to the **PDM Information** page.

Search Alphabetically

1. Select **Search Alphabetically** radio button.
2. Select the **Search** button.

The screenshot shows a web form titled "Provider Search". Below the title, it says "Select One of the Following Options." There are two radio buttons: "Search By Provider" (which is unselected) and "Search Alphabetically" (which is selected). To the right of these buttons is a "Search" button with a magnifying glass icon.

Figure 8: Provider Search - Search Alphabetically.

3. Select the **Select** drop down menu to select the corresponding letter for the Provider Name.
4. Select the **Search** button.

The screenshot shows the "Provider Search" form with the "Select" dropdown menu open. The menu lists letters from H to O. The "Search" and "Return" buttons are visible. At the bottom of the page, there are several links: "EOHHS Accessibility Policy", "EOHHS Web Feedback", "EOHHS Site Policies", "Contact Us", and "About This Website".

Figure 9: Provider Search - Search Alphabetically by Provider Name.

The Provider Search page returns with results based off of entered criteria.

Select provider below	
Name	FEIN
Kennedy-Donovan Center, Inc.	042519028
Kenney Enterprises, LLC	161625282
Key Program, Inc.	042539878
Kids Are People Elementary	043201225
KIT Clark Senior Services, Inc.	460516856

Figure 10: Search Alphabetically - The Provider Search page returns with results based off of entered criteria.

5. Select record to view. The user will be redirected to the **PDM Information** page.

PDM Information Page

The PDM Information page contains demographic information about the selected provider and displays the following information:

- Corporate Contact Information
- Provider's PDM Contact
- Executive Contacts
- General Corporate Information

Users assigned the Principal Purchasing Agency (PPA) and Agency Observer roles have View only rights on the Information page.

The Information page has the following button located at the bottom of the page:

- **Return to Search:** Returns user to the Provider Search page.

Provider Name: ABC Organization, Inc.		FEIN: XXXXXXXXX	Last Updated from CIW/OSD: 09/04/2015
Information	Qualification	Contract Detail	Surplus Revenue
Corporate Contact Information			
Legal Address (sourced from CIW)	1250 ANY STREET, SUITE A ANYTOWN MASSACHUSETTS USA 00000	Alternate Address	1250 Any Street Suite A Anytown Massachusetts USA 00000
Phone		Phone	(555) 555-1212 x1234
		Fax	(555) 555-1414
		Email	
		Website	http://www.abcorganization.com
Provider's PDM Contact			
Name	Jane Provider	Phone	(555) 555-1515 x9876
Email	Jane.Provider@organization.com	Fax	(555) 555-1414
Executive Contacts			
CEO/Executive Director			
CEO/Executive Director	William Provider		
Phone	(555) 555-1717 x2587	Email	William.Provider@organization.com
Chief Financial Officer			
Chief Financial Officer	Ronald Provider		
Phone	(555) 555-1818 x5478	Email	Ronald.Provider@organziation.com
General Corporate Information			
Mission Statement	ABC Organization's mission is to assist troubled youth and their families with developing positive life skills and life experiences so that they may pursue productive and rewarding lives.		
Corporate Description	The ABC Organization Inc is a private, non-profit, tax-exempt agency that provides youth and family services throughout Massachusetts and Rhode Island. Grounded in a strength-based philosophy, ABC focuses on unlocking the potential of youth and families. Through a variety of residential and non-residential program models and settings, ABC provides direct services each day to over 600 adolescents from the child welfare, mental health, juvenile justice, and educational systems. We create opportunities for those in our various programs to learn new skills and approaches to problem solving.		
Return to search			

Figure 11: PDM Information page.

PDM Qualification Page

The PDM Qualification page is populated when the EOHHS Principal Purchasing Agency (PPA) Provider Qualification Officer (PQO) completes the review process. The PDM system calculates these fields using data from Provider's UFR filing from OSD data feed and cannot be edited.

A user assigned the **Principal Purchasing Agency (PPA)** role can edit specific data fields on this page.

A user assigned the **Agency Observer** role has View only rights.

Provider Name: Key Program, Inc.		FEIN: 042539878	Last Updated from CIW/OSD: 08/05/2015				
Information	Qualification	Contract Detail	Surplus Revenue				
		Financial Ratios	Corrective Measures				
Qualification							
PQ Year	2011	<input type="button" value="Update"/>	PPA	DCF			
For Profit	N		MEP Status	Contracting Child / Affiliate			
Parent/Child/Affiliate Providers							
Name	FEIN	PPA	UFR Filer	MEP Status	FY 2009 POS Total Expenditure		
Key Program, Inc.	042539878		Y	CC	\$27,055,071.72		
Alternatives for Youth, Inc.	043276173		N	NC			
Status							
Qualification Status	Unconditional	Date Qualification status Last Updated:	2010-03-12				
UFR Fiscal Year End date	2009-06-30	UFR Original Submission Date	2009-11-16				
Going Concern	N	A-133 Submitted	UFR-A133				
Internal Control Finding		Compliance Finding					
Exemption Type							
Concerns/Issues							
<input checked="" type="checkbox"/>	Financial Ratios	<input checked="" type="checkbox"/>	Management letter	<input checked="" type="checkbox"/>	Notes To Financial	<input checked="" type="checkbox"/>	Other
Comments							
Comments							
Comments	Commented By	Commented On					
Type comment or issue here!!!	pdmposprogoper	10/05/2015					
other comments	pdmposprogoper	10/05/2015					
Notes to Financial	pdmposprogoper	10/05/2015					
Management Letter comment	pdmposprogoper	10/05/2015					
Financial ration comment	pdmposprogoper	10/05/2015					
<input type="button" value="Edit"/>		<input type="button" value="Return to search"/>					

Figure 12: PDM Qualification page.

Qualification – Viewing PQ Year

PDM maintains the current PQ year along with previous years. The Qualifications page defaults to the current PQ Year. To view a prior year,

1. Select the **PQ Year** drop down arrow and select the **Year** to be viewed.
2. Select the **Update** button.

The screenshot shows the 'Qualification' section of a web application. It includes a 'PQ Year' dropdown menu currently set to 2011, with a list of years (2011-2016) visible. An 'Update' button is highlighted with a red box. Below the dropdown, there is a 'Parent/Child/Affiliate Provider' dropdown menu also showing 2011. Other fields include 'For Profit' (N), 'PPA', 'MEP Status', and 'DCF'.

Figure 13: Under the Qualifications page, changing the PQ Year to 2011 and selecting the Update button.

Note: Each time the PQ Year is selected it must be followed by selecting the update button to ensure all data is up to date per the selection.

A user with the Principal Purchasing Agency (PPA) role can edit the following sections on the Qualifications page:

- **Qualification Status**
- **Concerns / Issues**
- **Comments**

1. Select the **Edit** button at the bottom of the page.

The screenshot shows the 'Qualification' page with various sections. At the top, there are tabs for 'Financial ratios' and 'Corrective Measures'. The 'Qualification' section shows 'PQ Year' set to 2011 and an 'Update' button. Below this is the 'Parent/Child/Affiliate Providers' table:

Name	FEIN	PPA	UFR Filer	MEP Status	FY 2009 POS Total Expenditure
Key Program, Inc.	042539878		Y	CP	\$27,055,071.72
Alternatives for Youth, Inc.	043276173		N	NC	

Below the table is the 'Status' section with fields for 'Qualification Status' (Unconditional), 'UFR Fiscal Year End date' (2009-06-30), 'Going Concern' (N), 'Internal Control Finding', and 'Exemption Type'. The 'Concerns/Issues' section has checkboxes for 'Financial ratios', 'Management letter', 'Notes To Financial', and 'Other'. At the bottom, the 'Edit' button is highlighted with a red box, along with a 'Return to search' button.

Figure 14: Selecting the Edit button on the Qualification page.

Parent/Child/Affiliate Providers

The Parent/Child/Affiliate Providers section allows the Principal Purchasing Agency (PPA) and Agency Observer to view the other providers associated to this provider.

Note: Parent/Child/Affiliate Providers information will only be visible if the Provider has Child or Affiliate Providers.

Parent/Child/Affiliate Providers					
Name	FEIN	PPA	UFR Filer	MEP Status	FY 2009 POS Total Expenditure
Key Program, Inc.	042539878		Y	CP	\$27,055,071.72
Alternatives for Youth, Inc.	043276173		N	NC	\$0.00

Figure 15: Parent/Child/Affiliate Providers section under the Qualification page.

1. Select record to view. The user will be redirected to the **PDM Information** page for that provider organization.

Status

The Status section allows the PPA to update the Qualification Status.

To update the Qualification Status field,

1. Select the **Qualification Status** drop down arrow and select one of the following options:
 - Conditional
 - Limited
 - No POS Business
 - Pending
 - Provisional
 - Public Entity
 - Qualification with CAP
 - Rejected
 - Unconditional
2. Select the **Save** button.

Status	
Qualification Status	No POS Business <input type="button" value="v"/>
UFR Fiscal Year End date	Conditional
Going Concern	Limited
Internal Control Finding	No POS Business
Exemption Type	Pending
	Provisional
	Public Entity
	Qualification with CAP
	Rejected
	Unconditional
Date Qualification status Last Updated:	2014-11-26
UFR Original Submission Date	2014-07-01
A-133 Submitted	UFR-A133
Compliance Finding	

Figure 16: Status section under the Qualification page.

Concerns/Issues

A user with the Principal Purchasing Agency (PPA) role can edit the Concerns/Issues section. If a checkmark is placed in any one of the checkboxes, the user will need to add an explanation on the Corrective Measures page. Refer to the Corrective Measures in this chapter for more information.

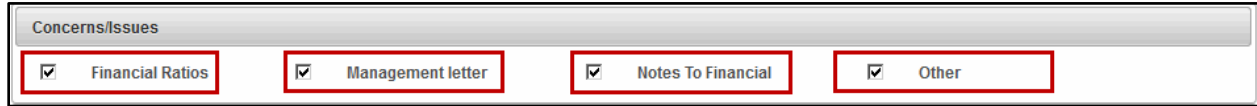


Figure 17: Concerns/Issues section on the Qualification page.

Comments

A user with the Principal Purchasing Agency (PPA) role can add /delete comments in this section.

To Add a Comment:

1. Type the Comments you desire in the **Comment** field.
2. Select the **Save** button.

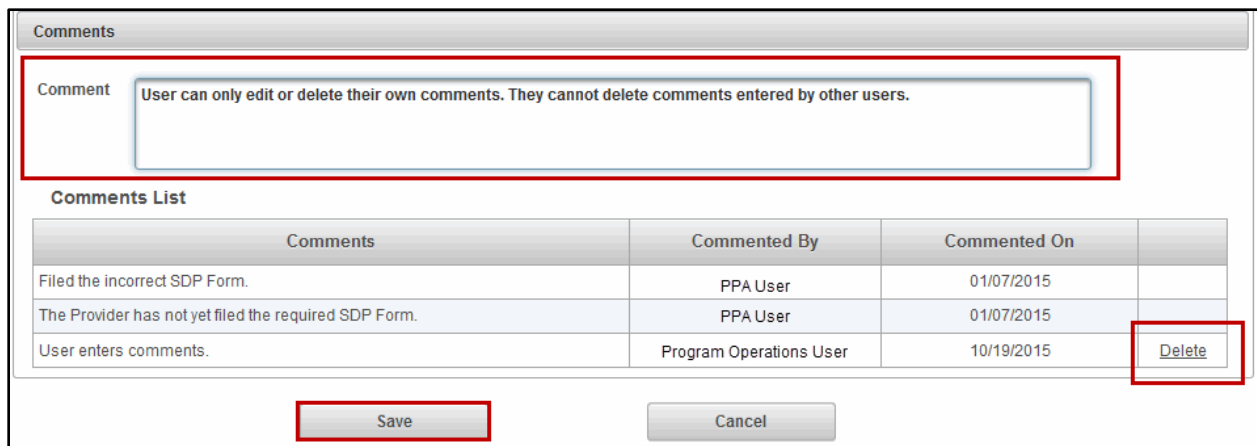
The comment will display in the comments dialog box.

To Delete a Comment:

1. Select the **Delete** link.
2. Select the **Save** button.

Note: Only the author can edit and/or delete his or her own comments.

The graphic below represents comments added along with highlighting the Delete option.



Comments	Commented By	Commented On	
Filed the incorrect SDP Form.	PPA User	01/07/2015	
The Provider has not yet filed the required SDP Form.	PPA User	01/07/2015	
User enters comments.	Program Operations User	10/19/2015	Delete

Figure 18: Comments section on the Qualification page.

Note: A reminder that if you navigate away from any page while in Edit mode without saving, PDM will prompt a Warning screen.

PDM Qualification – Financial Ratios

The Financial Ratios page contains vital financial ratios for current and past two years.

1. Select the **Financial Ratios** link

Provider Name: ABC Organization, Inc		FEIN: XXXXXXXXX	Last Updated from CIW/OSD: 09/04/2015	
Information	Qualification	Contract Detail	Surplus Revenue	
PQ Year: 2016	PPA: DPH	Financial Ratios	Corrective Measures	
Financial Ratios from UFR				
Financial Ratios	2013	2014	2015	Threshold Variance
Qualification Status	No POS Business	No POS Business	No POS Business	N/A
Current Ratio	1.42	1.39	0	>= 1
Days in Working Capital	25.42	25.18	0	>= 10
Total Margin	0.05	0.06	0	>= -5%
Days in Cash	46.30	53.86	0	>= 10
Days in Receivable	41.99	38.06	0	<= 90
Days in Payables	60.54	64.80	0	<= 60
Debt Ratio	0.22	0.22	0	> 50%

Figure 19: Highlighting the Financial Ratios page from the Qualification page.

The Financial Ratios page displays the last 3 fiscal years prior to the PQ year selected.

1. Select any one of the **links** in the first column to open the Financial Ratios Definitions page.

Information	Qualification	Contract Detail	Surplus Revenue
PQ Year: 2011	PPA: DCF	Financial ratios	Corrective Measures
Current Ratio	This ratio is a liquidity ratio and is an indicator of how well an organization can meet its current obligations, payroll, accounts payable, etc. A higher ratio indicates a liquid organization able to meet these current obligations. Like all liquidity ratios, one should also look at the non-liquid assets and liabilities, to see if they might have an effect on this ratio. Example, an organization may have a bad ratio here, but have sizeable amounts of money in Investments, that is not a factor in determining this ratio. Formula: Total Current Assets (Sop Line 11) / Total Current Liabilities (Sop Line 26)		
Days in Working Capital	The days in working capital is an indication of how much of the short-term financial resources will be left over if all of the organization's short-term financial obligations are paid off. Generally, the more days in working capital, the better. Formula: Total Current Assets (Line 11, SOP) less Total Current Liabilities (Line 26, SOP) * 365 / Total Expenses (Line 17, SOA) less Total Depreciation of Buildings and Equipment (Line 7, SFE)		
Total Margin	The total margin ratio is the percentage calculated by dividing the excess of revenues less expenses, or Change in Net Assets (Net Income) by total revenues. The total margin provides a measure of an organization overall profitability utilizing its net income or loss. The higher the percentage the more profitable the organization is while a negative percentage indicates that the organization is losing assets and if this trend continues indicates the possible failure of this organization in surviving. Formula: = (Total Revenue (Soa Line 13)- Total Expense (Soa Line 19)) / Total Revenue (Soa Line 13)		
Days in Cash	The days' cash is the number of days the organization can continue in operation if cash inflow stops. The more days in cash the better this organization is. Formula: (Total Cash (Sop Line 1) * 365) / (Total Expense (Soa Line 1) - Total Depreciation (Sfe Line 7))		
Days in Receivable	Days in receivables are how long it takes an organization to receive the money for the services it sells. This is useful for determining how efficient the company is at receiving whatever short-term payments it is owed. Lower is better! Formula: Days In Receivables = (Net Accounts Receivable, Program Services (Sop Line 4) * 365) / Program Service Fees (Soa Line 4)		
Days in Payables	Days in payables are how long it takes an organization to pay its bills. This is useful for determining how efficient the company is in paying its bills. Lower is better! While higher is generally not better, an organization able to delay payments to its vendors this without incurring penalties for late payments is financing its operations through its creditors willing to accept these late payments, a good thing. Formula: Days In Payables = (Total Current Liabilities (Sop Line 26) – Deferred Revenues (Sop Line 14) * 365) / (Total Expense (Soa Line 19) - Total Depreciation (Sfe Line 7))		
Debt Ratio	This ratio provides an indication of how much of the organization assets are financed by debt. It also provides an indicator of how much of the organizations assets would be available to pay off debt in the event of liquidation. The lower this ratio indicates a healthy organization capable of assuming more debt to finance its operations. The downside of this ratio is that it relies on values of assets that may have been acquired at an earlier date and therefore their value as of the taking of this ratio may not be accurate. Formula: Total Liabilities (Sop Line 30) / Total Assets (Sop Line 18)		
Back		Return to search	

Figure 20: Financial Ratios page which is under Qualification.

2. Select **Back** to open the **Financial Ratios** page or select **Return to search** to open the Provider Search page.

PDM Qualification – Corrective Measures

The Corrective Measures page is part of Provider Profile and contains corrective measures.

Under the UFR Audit Findings section, if the Status field has a 'YES' this indicates that a checkmark was entered selected under the Qualification page for the Internal Control, Compliance, Financial Ratios, Management Letter, Notes to Financials, or Other. While an optional field, it is recommended that the PPA enter an explanation under UFR Audit Findings when the status is 'YES'.

1. Select **Edit** at the bottom of the page.

Concerns/Issues	Status	If Yes, Explanation Required
Internal Control	No	
Compliance	No	
Financial Ratios	Yes	
Management Letter	Yes	
Notes to Financials	No	
Other	No	

Figure 21: Corrective Measures page highlighting the Concerns/Issues section which requires explanation when "Yes" is displayed.

2. Type an explanation for each Concerns/Issues with a 'Yes' in the **Status** field.
3. Select the **Save** button.

Concerns/Issues	Status	If Yes, Explanation Required
Internal Control	No	
Compliance	No	
Financial Ratios	Yes	Enter Explanation for Financial Ratios
Management Letter	Yes	Enter Explanation for Management Letter
Notes to Financials	No	

Financial Audit Findings: Please Select

Buttons: Add Audit Record, Undo, Save, Cancel

Figure 22: Completed Concerns/Issues section under Corrective Measures page.

The **Corrective Action Plan** is updated by data on the UFR and by OSD/CIW. This is a View only section.

Corrective Action Plan	
CAP Filed with UFR	Yes
CAP Due Date	01/01/1900
Date CAP Received by OSD/CIW	01/01/1900

Figure 23: Corrective Action Plan section under the Corrective Measures page.

The **Audit Records (OSA AUDIT)** section can be updated by the PPA.

1. Type the **Audit Number**.
2. Type the **Issue Date**. (Format: DD/MM/YYYY or
3. Select the **CAP Status**. (Options: Open or Close)
4. Type the **Audit Resolution Summary**.
5. Select **Financial Audit Findings**. (Options: Yes or No)
6. Select the **Add Audit Record**.

Audit Records (OSA AUDIT)	
Audit Number *	<input type="text" value="1231231231"/>
Issue Date *	<input type="text" value="10/01/2015"/> <input type="button" value="📅"/> *Issue date must be within PQ Year
CAP Status	<input type="text" value="Close"/>
Audit Resolution Summary *	<input type="text" value="Summary"/>
Financial Audit Findings	<input type="text" value="Yes"/>
<input type="button" value="Add Audit Record"/> <input type="button" value="Undo"/>	

Figure 24: Audit Records (OSA Audit) section under the Corrective Measures page.

PDM CONTRACT DETAILS

The Contract Detail page stores information about the POS Provider's contracts for the current fiscal year such as Activity Code, Activity Name, Doc ID, Object Code, Maximum Contract Obligation, Expended to Date, and Unexpended Amount. For Release 5.0 PDM will only display contracts with Object Codes MM3 and M03.

The Principal Purchasing Agency (PPA) and Agency Observer roles allow designated staff from within the organization to view this page. These roles **do not** have Edit rights on this page.

Note: The information found under Contract Details is sourced from the Commonwealth's Information Warehouse. Information about services offered, but not contracted through EOHHS is entered by the provider.

This page provides the Purchasing Agency (PPA) and Agency Observer with a snapshot of all of current year contracts, by EOHHS agency.

Provider Name: ABC Organization, INC		FEIN: XXXXXXXXX		Last Updated from CIW/OSD:MM/DD/YYYY		
Information	Qualification	Contract Detail		Surplus Revenue		
POS PROVIDER CONTRACT DETAIL (Sourced From The CIW)				Current Year - 2015		
DMH						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
3062	STABILIZATION, ASSESSMENT AND RAPID INTERGRATION	MMDMH12100151255KEY1	MM3	\$60,000.00	\$16,449.00	\$43,550.00
<i>Total</i>				<i>\$60,000.00</i>	<i>\$16,449.00</i>	<i>\$43,550.00</i>
DSS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
FNSS	Fam Networks Supp & Stab	INTF0000009951520320	M03	\$95,675.00	\$72,981.00	\$22,693.00
DVCB	DV Community Based	INTF0000009950720102	M03	\$78,723.00	\$65,042.00	\$13,680.00
FNST	Fam Networks STARR	INTF0000051901519892	M03	\$97,000.00	\$91,786.00	\$5,213.00
<i>Total</i>				<i>\$229,809.00</i>	<i>\$229,809.00</i>	<i>\$41,586.00</i>
DSS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
FNSS	Fam Networks Supp & Stab	INTF0000009951520320	M03	\$95,675.00	\$72,981.00	\$22,693.00
DVCB	DV Community Based	INTF0000009950720102	M03	\$78,723.00	\$65,042.00	\$13,680.00
FNST	Fam Networks STARR	INTF0000051901519892	M03	\$97,000.00	\$91,786.00	\$5,213.00
<i>Total</i>				<i>\$229,809.00</i>	<i>\$229,809.00</i>	<i>\$41,586.00</i>
DYS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
2507	Alternative lock - Up	SCDYS964021209063014	M03	\$2,029,507.00	\$1,833,333.00	\$196,173.00
2522	Staff Secure Detention	SCDYS920513120663016	M03	\$822,232.00	\$437,871.00	\$384,361.00
2501	Hardware Secure Detention	SCDYS920513120663016	M03	\$520,531.00	\$520,531.00	\$0.00
2503	Staff Secure Treatment	SCDYS910813120363016	M03	\$1,520,922.00	\$1,466,122.00	\$54,800.00
<i>Total</i>				<i>\$4,257,857.00</i>	<i>\$4,257,857.00</i>	<i>\$635,334.00</i>

Figure 25: Contract Detail page lists all contracts a provider has with EOHHS agencies.

PDM SURPLUS REVENUE

The Surplus Revenue page is primarily used by the Principal Purchasing Agency (PPA) to record and retain an account of the surplus revenue liability based on the Annual SSR of 5% limit. If an excess 5% Surplus Revenue Liability exists, the Principal Purchasing Agency utilizes the corresponding fields below to provide an accounting of the negotiation with the Provider to satisfy the liability owed the Commonwealth.

Information	Qualification	Contract Detail	Surplus Revenue
Surplus Revenue			
Last updated from OSD:		06/23/2015	
PQ Year		2011	<input type="button" value="update"/>
SRR Summary for FY		2009	
Organization Type		Not for profit	
PPA Agency		DMR	
Liability based on Annual SRR 5 % Limit		\$44,497.29	
Date of Agency/Provider Agreement		10/07/2015	
Provider will reimburse the commonwealth by			
Cash Reimbursement		\$0.00	
Free Care		\$44,497.29	
Adjusted Unit rate Contract		\$0.00	
Other(*notes in comments)		\$0.00	
Costs Offset Refiled UFR		\$1.00	
Estimated Date Reimbursement will be completed		06/30/2011	
Date Reimbursement completed			
5 % Excess SRR Grand Total Planed Agency Recoveries		-1.0	
<input type="button" value="Edit"/>		<input type="button" value="Return to search"/>	

Figure 26: PDM Surplus Revenue page.

The Principal Purchasing Agency (PPA) can edit the following fields on the Surplus Revenue page:

- Date of Agency/Provider Agreement
- Cash Reimbursement
- Free Care
- Adjusted Unit Rate Contract
- Other (*notes in comments)
- Costs Offset Refiled UFR
- Estimated Date Reimbursement will be completed
- Date Reimbursement completed
- Comments

After entering in the information, the PPA selects the **Save** button.

Provider Name: ABC Organization, Inc. **FEIN:** XXXXXXXXX **Last Updated from CIW:** 06/11/2010

Information	Qualification	Contract Detail	Surplus Revenue
Surplus Revenue			
Last updated from OSD:	06/23/2015		
PQ Year	2011		
SRR Summary for FY	2009		
Organization Type	Not for profit		
PPA Agency	DMR		
Liability based on Annual SRR 5 % Limit	44497.29		
Date of Agency/Provider Agreement *	10/07/2015 <input type="button" value="🗓"/>		
Provider will reimburse the commonwealth by			
Cash Reimbursement	<input type="text" value="0.0"/>		
Free Care	<input type="text" value="44497.29"/>		
Adjusted Unit rate Contract	<input type="text" value="0.0"/>		
Other(*notes in comments)	<input type="text" value="0.0"/>		
Costs Offset Refiled UFR	<input type="text" value="1.0"/>		
Estimated Date Reimbursement will be completed *	06/30/2011 <input type="button" value="🗓"/>		
Date Reimbursement completed	<input type="text" value=""/> <input type="button" value="🗓"/>		
5 % Excess SRR Grand Total Planed Agency Recoveries	-1.0		
Comments			
Comment	<input type="text"/>		
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>	

Figure 27: PDM Surplus Revenue page in Edit mode.

Chapter 4: POS Program Operations Role

OVERVIEW

This role allows POS Operations staff to Add and Manage Providers in the system. This role also has access to edit capability and the ability to assign PPAs. In addition this role has access to the reports menu.

POS Program Operations This role allows POS Program Operations access the provider PDM records. POS Program Operations with this access have the capability to edit and update information.

PDM Role	Information	Qualifications (Including Financial Ratio and Corrective Measures)	Contract Detail	Surplus Revenue
POS Program Operations	View/Edit	View/Edit	View	View/Edit

Reminders When Using PDM:

- All fields denoted with an asterisk (*) are required fields and must be completed in order to save the record.
- Do not save a record until all sections are completed. If the user tries to save before completing all required fields within each section, the user will receive error messages at the top of the page listing the missing data.
- If you attempt to navigate to another page while in **Edit** mode without first saving you will receive a warning message (different text depending on the web browser you are working in) such as:
 - **Firefox:** “This page is asking you to confirm that you want to leave – data you have entered may not be saved.”
 - **Internet Explorer:** “Are you sure you want to navigate away from this page? This page is asking you to confirm that you want to leave – data you have entered may not be saved. Press OK to continue, or Cancel to stay on the current page.”

For guidance on using JAWS with PDM, refer to **Appendix B: JAWS Commands**.

PROVIDER SEARCH

A user with the POS Program Operations role has the ability to search for providers. It is important to know how to search for providers within the database. The search page allows the user to search for an existing Provider in order to manage or view (dependent on role) an existing provider who is active for the current PQ year and who has had a contract with the Commonwealth in the past five years.

Using a name, a portion of a name or an alphabetical listing the search engine conducts a search of the database to display a provider's profile.

The Search page is accessed by selecting Manage Provider from the Navigation menu.

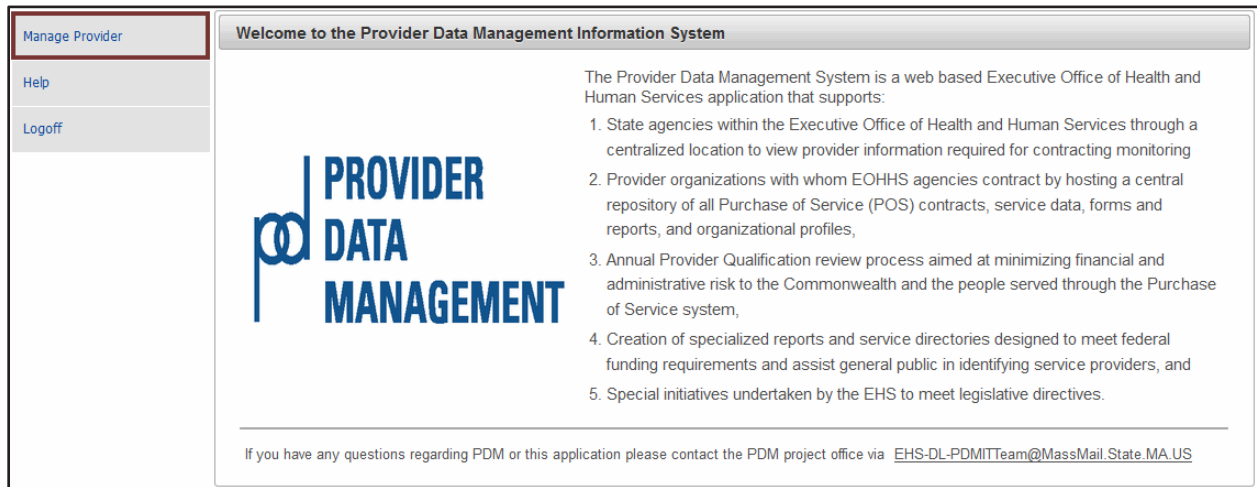


Figure 28: Welcome to the Provider Data Management Information System page.

The **Provider Search** page allows users to search for entries in two ways:

- **Search By Provider**
- **Search Alphabetically**

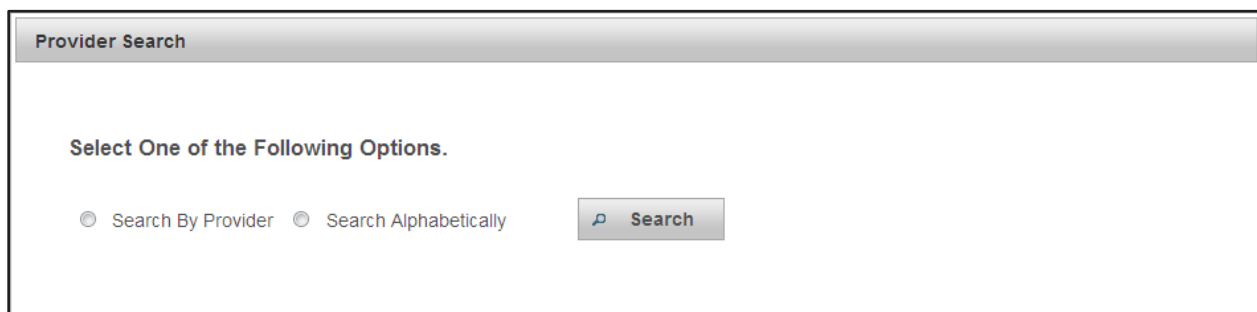


Figure 29: Provider Search page

Search By Provider

1. Select the **Search By Provider** radio button.
2. Select the **Search** button.

Provider Search

Select One of the Following Options.

Search By Provider Search Alphabetically

Figure 30: Searching by Provider option.

Note: The **Provider Search** page allows users to search for records in three ways. Users can search by using one option or a combination of options.

- **FEIN #** (Federal Employment Identification Number)
- **Name** (Provider Name)
- **PPA** (Principal Purchase Agency)

3. Type the **Name**. (Full or Partial name).

There are three buttons under the **Provider Search** section:

- **Search:** To conduct a search per entered criteria.
- **Clear:** To clear criteria from fields.
- **Return:** To return to the Search option page.

4. Select the **Search** button.

The search results page open.

Provider Search

FEIN

NAME

PPA

Provider Search

Select provider below

Name	FEIN	PPA
Catherine E. Key	900174165	DCF
Key Program, Inc.	042539878	DPH

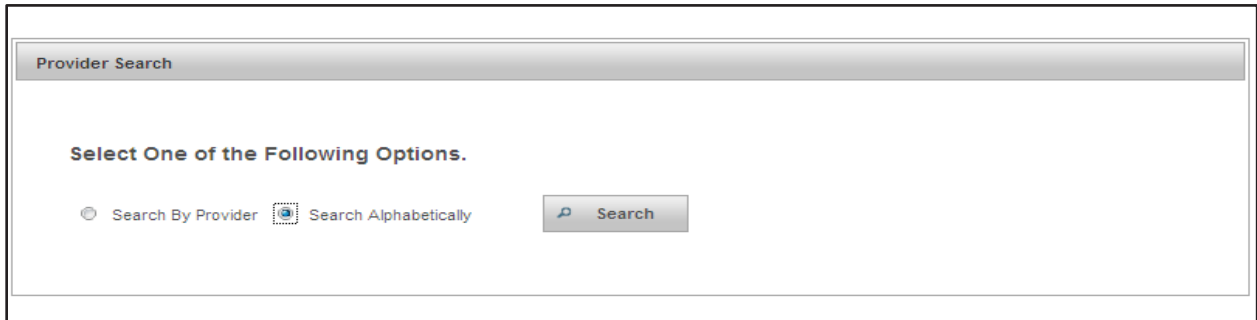
Figure 31: Provider Search page returns with results based off of entered criteria

5. Select record to view. The user will be redirected to the **PDM Information** page.

Note: Wildcard Search, the * (asterisk) can be used as a wildcard in the name field to search for a provider. If you are unsure of the full name of the provider, or want to see all the options using a portion of a name, use the wild card to search. (i.e. ***key** will produce *Catherine Key*, **Berkshire*** will produce *Berkshire Community Center* etc., ***education*** will produce any provider who has the word *education* in their organization name.)

Search Alphabetically

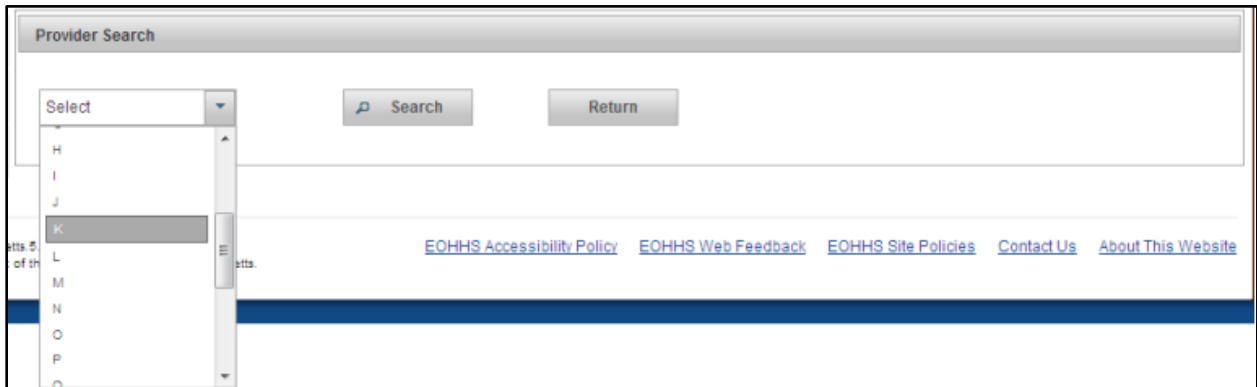
1. Select **Search Alphabetically** radio button.
2. Select the **Search** button.



The screenshot shows a web form titled "Provider Search". Below the title, it says "Select One of the Following Options." There are two radio buttons: "Search By Provider" (which is unselected) and "Search Alphabetically" (which is selected). To the right of these buttons is a "Search" button with a magnifying glass icon.

Figure 32: Provider Search - Search Alphabetically

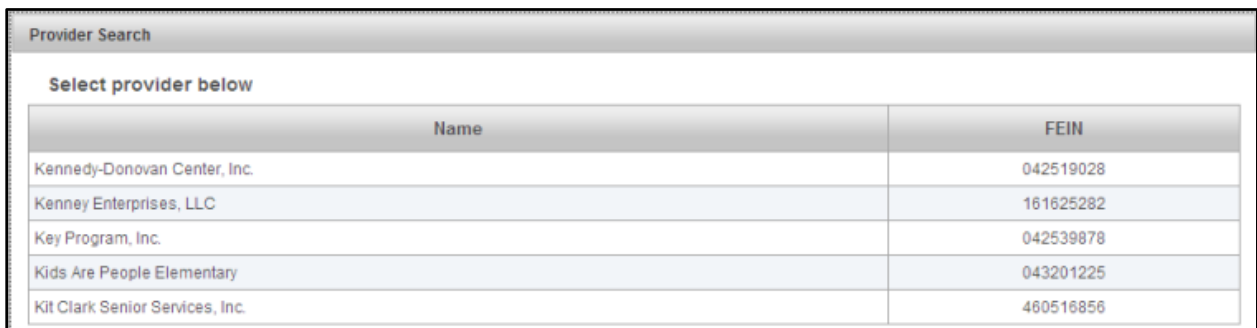
3. Select the **Select** drop down menu to select the corresponding letter for the Provider Name.
4. Select the **Search** button.



The screenshot shows the "Provider Search" form with the "Select" dropdown menu open. The dropdown menu lists letters from H to O. The "Search" button is visible to the right of the dropdown. Below the search area, there are several links: "EOHHS Accessibility Policy", "EOHHS Web Feedback", "EOHHS Site Policies", "Contact Us", and "About This Website".

Figure 33: Provider Search - Search Alphabetically by Provider Name.

The Provider Search page returns with results based off of entered criteria.



Select provider below	
Name	FEIN
Kennedy-Donovan Center, Inc.	042519028
Kenney Enterprises, LLC	161625282
Key Program, Inc.	042539878
Kids Are People Elementary	043201225
Kit Clark Senior Services, Inc.	460516856

Figure 34: Search Alphabetically - The Provider Search page returns with results based off of entered criteria.

5. Select record to view. The user will be redirected to the PDM Information page.

PDM INFORMATION

The Information page stores demographic information about a Provider such as Corporate Contact Information, Provider's PDM Contact, Executive Contact, and General Corporate Information (Mission Statement and Corporate Description).

After a user with the POS Program Operation role searches for and selects a provider record they are redirected to the PDM Information page.

Users assigned the POS Program Operations role have View and Edit rights on the Information page.

The Information page has two buttons located at the bottom of the page:

- **Edit:** The Edit button will appear for users with the PDM Contracted Providers Operations role.
- **Return to Search:** Returns user to the Provider Search page.

Provider Name: ABC Organization, Inc.		FEIN: XXXXXXXX	Last Updated from CIW/OSD: 09/04/2015
Information	Qualification	Contract Detail	Surplus Revenue
Corporate Contact Information			
Legal Address (sourced from CIW)	1250 ANY STREET, SUITE A ANYTOWN MASSACHUSETTS USA 00000	Alternate Address	1250 Any Street Suite A Anytown Massachusetts USA 00000
Phone		Phone	(555) 555-1212 x1234
		Fax	(555) 555-1414
		Email	
		Website	http://www.abcorganization.com
Provider's PDM Contact			
Name	Jane Provider	Phone	(555) 555-1515 x9876
Email	Jane.Provider@organization.com	Fax	(555) 555-1414
Executive Contacts			
CEO/Executive Director			
CEO/Executive Director	William Provider		
Phone	(555) 555-1717 x2587	Email	William.Provider@organization.com
Chief Financial Officer			
Chief Financial Officer	Ronald Provider		
Phone	(555) 555-1818 x5478	Email	Ronald.Provider@organization.com
General Corporate Information			
Mission Statement	ABC Organization's mission is to assist troubled youth and their families with developing positive life skills and life experiences so that they may pursue productive and rewarding lives.		
Corporate Description	The ABC Organization Inc is a private, non-profit, tax-exempt agency that provides youth and family services throughout Massachusetts and Rhode Island. Grounded in a strength-based philosophy, ABC focuses on unlocking the potential of youth and families. Through a variety of residential and non-residential program models and settings, ABC provides direct services each day to over 600 adolescents from the child welfare, mental health, juvenile justice, and educational systems. We create opportunities for those in our various programs to learn new skills and approaches to problem solving.		
<input type="button" value="Edit"/>		<input type="button" value="Return to search"/>	

Figure 35: PDM Information page.

Corporate Contact Information

Under **Corporate Contact Information** the following fields can be edited by a user with the POS Program Operation role:

- Alternate Address
- Phone, Fax
- Email, Website

Note: The Provider Name, FEIN and Legal Address fields are not editable. This data comes from the Commonwealth's Information Warehouse (CIW).

The screenshot shows a web form titled "Corporate Contact Information". At the top, it displays "Provider Name: ABC Organization, Inc.", "FEIN: XXXXXXXX", and "Last Updated from CIW/OSD: 09/04/2015". The form is divided into two main sections. The left section contains "Legal Address (sourced from CIW)" with the value "1250 ANY STREET, SUITE A ANYTOWN MASSACHUSETTS USA 00000" and a "Phone" field. The right section, highlighted with a red border, contains "Alternate Address" with the value "1250 Any Street", "Address Line 2" with "Suite A", "City" with "Anytown", "State" with a dropdown menu showing "MA", "Zip" with "00000", "Phone" with "(555) 555-1212 x12345", "Fax" with "(555) 555-1414", "Email" with an empty field, and "Website" with "http://www.abctorganization.i".

Figure 36: Fields that can be updated on Information > Corporate Contact Information section of the Information page.

If only updates to the **Corporate Contact Information** section are needed, select the **Save** button at the bottom of the page.

Provider's PDM Contact

Under Provider's PDM Contact the following fields can be edited by a user with the POS Program Operation role:

- First, Middle, and Last
- Phone, Email, Fax

The screenshot shows a web form titled "Provider's PDM Contact". The form is divided into two rows of fields. The first row contains "First" with the value "Jane", "MI" with an empty field, and "Last" with the value "Provider". The second row contains "Phone" with "(555) 555-1515 x98765", "Email" with "Jane.Provider@organization", and "Fax" with "(555) 555-1414". The entire form area is highlighted with a red border.

Figure 37: Fields that can be updated on Information > Provider's PDM Contact section of the Information page.

If only updates to the Provider's PDM Contact section are needed, select the **Save** button at the bottom of page.

Executive Contacts

Under **Executive Contacts > CEO/Executive Director** the following fields can be edited by a user with the POS Program Operation role:

- First, Middle, and Last
- Phone, Email

Under **Executive Contacts > Chief Financial Officer** the following fields can be edited by a user with the POS Program Operation role:

- First, Middle, and Last
- Phone, Email

The screenshot shows a web form titled "Executive Contacts". It contains two sections: "CEO/Executive Director" and "Chief Financial Officer". Each section has input fields for First, Middle (MI), Last, Phone, and Email. The CEO/Executive Director fields are: First: William, MI: (empty), Last: Provider, Phone: (555) 555-1717 x25874, Email: William.Provider@organizati. The Chief Financial Officer fields are: First: Ronald, MI: (empty), Last: Provider, Phone: (555) 555-1818 x54789, Email: Ronald.Provider@organizati.

Figure 38: Fields that can be updated on Information > Executive Contacts section of the Information page.

If only updates to the **Executive Contacts** section are needed, select the **Save** button at the bottom of page.

General Corporate Information/ Mission Statement

Under **General Corporate Information** the following field can be edited by a user with the POS Program Operation role:

- Mission Statement
- Corporate Description

The screenshot shows a web form titled "General Corporate Information". It contains two text areas: "Mission Statement" and "Corporate Description". The Mission Statement text is: "ABC Organization's mission is to assist troubled youth and their families with developing positive life skills and life experiences so that they may pursue productive and rewarding lives." The Corporate Description text is: "The ABC Organization Inc is a private, non-profit, tax-exempt agency that provides youth and family services throughout Massachusetts and Rhode Island. Grounded in a strength-based philosophy, ABC focuses on unlocking the potential of youth and families. Through a variety of residential and non-residential program models and settings, ABC provides direct services each day to over 600 adolescents". At the bottom of the form, there are "Save" and "Cancel" buttons.

Figure 39: Fields that can be updated on Information > General Corporate Information section on the Information page.

If only updates to the General Corporate Information section are needed, select the **Save** button at the bottom of page.

PDM Qualification

The PDM Qualification page is populated when the EOHHS Principal Purchasing Agency (PPA) Provider Qualification Officer (PQO) completes the review process. The PDM system calculates the financial ratios field using data from Provider’s UFR filing from OSD data feed and cannot be edited.

Provider Name: ABC Organization, Inc		FEIN: XXXXXXXXX	Last Updated from CIW/OSD: 09/04/2015
Information	Qualification	Contract Detail	Surplus Revenue
		<u>Financial Ratios</u>	<u>Corrective Measures</u>
Qualification			
PQ Year	2016	<input type="button" value="Update"/>	PPA DPH
For Profit	N	MEP Status	Single Entity
UFR Filer		FY 2014 POS Total Expenditure	\$26,156,389.83
Status			
Qualification Status	No POS Business	Date Qualification status Last Updated:	2014-11-26
UFR Fiscal Year End date	2014-06-30	UFR Original Submission Date	2014-07-01
Going Concern	N	A-133 Submitted	UFR-A133
Internal Control Finding		Compliance Finding	
Exemption Type			
Concerns/Issues			
<input checked="" type="checkbox"/> Financial Ratios	<input checked="" type="checkbox"/> Management letter	<input checked="" type="checkbox"/> Notes To Financial	<input checked="" type="checkbox"/> Other
Comments			
Comments			
Comments		Commented By	Commented On
Comments on financial ratio.		DPH Agency Staff	10/02/2015
team is making audit review at this time - will update...		DPH Agency Staff	09/14/2015
No SDP form submitted with FY2014 UFR filing. Excess 20% SRR Liability waiver requested for \$1,296,976.		DPH Agency Staff	11/26/2014

Figure 40: PDM Qualification page.

Qualification – Viewing PQ Year

PDM maintains the current PQ year along with previous years. The Qualifications page defaults to the current PQ Year.

To view a prior PQ Year,

1. Select the **PQ Year** drop down arrow and select the **Year** to be viewed.
2. Select the **Update** button.

Qualification

PQ Year: 2011 (dropdown menu open with 2011 selected)

Update (button highlighted with a red box)

PPA: DCF

For Profit: MEP Status: Contracting Parent

Parent/Child/Affiliate Provider: 2011 (dropdown menu open with 2011 selected)

Figure 41: Under the Qualifications page, changing the PQ Year to 2011 and selecting the Update button.

Note: Each time the PQ Year is selected it must be followed by selecting the update button to ensure all data is up to date per the selection.

The Qualification page now displays the data corresponding to PQ Year 2011.

A user assigned the **POS Program Operation** role can update the following fields:

- PPA, MEP Status, Qualification Status
- Concerns / Issues, Comments

3. Select the **Edit** button at the bottom of the page.

Financial ratios Corrective Measures

Qualification

PQ Year: 2011 (dropdown menu)

Update (button)

PPA: DCF

For Profit: N MEP Status: Contracting Parent

Parent/Child/Affiliate Providers

Name	FEIN	PPA	UFR Filer	MEP Status	FY 2009 POS Total Expenditure
ABC Organization, Inc.			Y	CP	\$27,055,071.72
Training Organization, Inc.			N	NC	

Status

Qualification Status: Unconditional Date Qualification status Last Updated: 2010-03-12

UFR Fiscal Year End date: 2009-06-30 UFR Original Submission Date: 2009-11-16

Going Concern: N A-133 Submitted: UFR-A133

Internal Control Finding: Compliance Finding

Exemption Type:

Concerns/Issues

Financial ratios Management letter Notes To Financial Other

Edit (button highlighted with a red box) Return to search (button)

Figure 42: Selecting the Edit button on the Qualification page.

Qualification

Under the Qualification section, a user with the POS Program Operation role can edit and update the following fields:

- PPA (Principal Purchasing Agent)
- MEP Status (Multiply Entity Provider)
- Qualification Status
- Concerns/Issues/Comments

Note: The PPA field displays the agency associated to the contract in PDM. Contracts feed over from the CIW with DMR, DSS and WEL associated with the contract, but those department names have changed. For prequalification purposes DMR contracts need to be associated with DDS contract, DSS contracts with DCF; and WEL contracts with DTA.

1. Select the **PPA** drop down arrow and select correct agency code.
2. Select the **Save** button.

The screenshot shows the Qualification page with the PPA dropdown menu open. The menu lists the following options: DPH, DCF, DDS, DMH, DPH (highlighted), DTA, DYS, EHS, ELD, MCB, MCD, MRC, ORI, VET, and WEL. The background table shows the following data:

Name	FEIN	PPA	UFR	MEP Status	FY 2014 POS Total Expenditure
Key Program, Inc.	042539878			CC	\$26,156,389.83
Alternatives for Youth, Inc.	043276173			NC	

Figure 43: Selecting the PPA on the Qualification page.

The **MEP Status** field can be updated.

3. Select the **MEP Status** drop down arrow and select the MEP Status.

MEP Status field has the following options:

- Contracting Child/Affiliate
- Contracting Parent
- Non Contracting Child/Affiliate
- Non Contracting Parent
- Single Entity

4. Select the **Save** button.

The screenshot shows the Qualification page with the MEP Status dropdown menu open. The menu lists the following options: Contracting Child / Affiliate (highlighted), Contracting Parent, Non Contracting Child / Affiliate, Non Contracting Parent, and Single Entity. The background table is the same as in Figure 43.

Figure 44: Selecting the MEP Status on the Qualification page.

Parent/Child/Affiliate Providers

The Parent/Child/Affiliate Providers section allows the POS Program Operation staff person to view and update, if needed, the other providers associated to this provider.

Note: Parent/Child/Affiliate Providers information will only be visible if the Provider has Child or Affiliate Providers.

Parent/Child/Affiliate Providers					
Name	FEIN	PPA	UFR Filer	MEP Status	FY 2009 POS Total Expenditure
Key Program, Inc.	042539878		Y	CP	\$27,055,071.72
Alternatives for Youth, Inc.	043276173		N	NC	\$0.00

Figure 45: Parent/Child/Affiliate Providers section under the Qualification page.

5. Select record to view. The user will be redirected to the **PDM Information** page for that provider organization.

Status

The Status section allows the POS Program Operation staff person to update the Qualification Status.

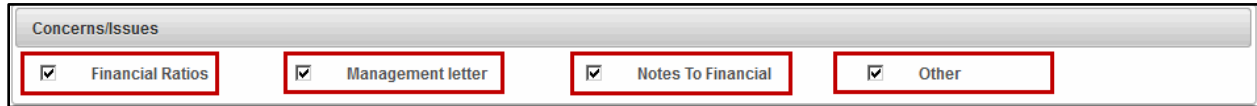
6. Select the **Qualification Status** drop down arrow and select one of the following options:
 - Conditional
 - Limited
 - No POS Business
 - Pending
 - Provisional
 - Public Entity
 - Qualification with CAP
 - Rejected
 - Unconditional
7. Select the **Save** button.

Status	
Qualification Status	No POS Business
UFR Fiscal Year End date	Conditional
Going Concern	Limited
Internal Control Finding	No POS Business
Exemption Type	Pending
	Provisional
	Public Entity
	Qualification with CAP
	Rejected
	Unconditional
Date Qualification status Last Updated:	2014-11-26
UFR Original Submission Date	2014-07-01
A-133 Submitted	UFR-A133
Compliance Finding	

Figure 46: Status section under the Qualification page.

Concerns/Issues

A user with the Principal Purchasing Agency (PPA) role can edit the Concerns/Issues section. If a checkmark is placed in any one of the checkboxes, the user will need to add an explanation on the Corrective Measures page. Refer to the Corrective Measures in this chapter for more information.



The screenshot shows a header bar labeled "Concerns/Issues" with four checkboxes below it, each enclosed in a red box. The checkboxes are: "Financial Ratios" (checked), "Management letter" (checked), "Notes To Financial" (checked), and "Other" (checked).

Figure 47: Concerns/Issues section under the Qualification page.

Comments

A user with the Principal Purchasing Agency (PPA) role can add /delete comments in this section.

To Add a Comment:

1. Type the Comments you desire in the **Comment** field.
2. Select the **Save** button.

The comment will display in the comments dialog box.

To Delete a Comment:

3. Select the **Delete** link.
4. Select the **Save** button.

Note: Only the author can edit and/or delete his or her own comments.

The graphic below represents comments added along with highlighting the Delete option.



The screenshot shows a "Comments" dialog box. At the top is a text input field labeled "Comment" containing the text: "User can only edit or delete their own comments. They cannot delete comments entered by other users." Below this is a "Comments List" table with three columns: "Comments", "Commented By", and "Commented On". The table contains three rows of data. At the bottom of the dialog are "Save" and "Cancel" buttons. A red box highlights the "Delete" link in the third row of the table.

Comments	Commented By	Commented On	
Filed the incorrect SDP Form.	PPA User	01/07/2015	
The Provider has not yet filed the required SDP Form.	PPA User	01/07/2015	
User enters comments.	Program Operations User	10/19/2015	Delete

Figure 48: Comments section under the Qualification page.

Note: A reminder that if you navigate away from any page while in Edit mode without saving, PDM will prompt a Warning screen.

PDM Qualification – Financial Ratios

The Financial Ratios tab contains vital financial ratios for current and previous two fiscal years.

1. Select the **Financial Ratios** link.

Provider Name: ABC Organization, Inc FEIN: XXXXXXXXX Last Updated from CIW/OSD: 09/04/2015

Information **Qualification** Contract Detail Surplus Revenue

PQ Year: 2016 PPA: DPH **Financial Ratios** Corrective Measures

Financial Ratios from UFR

Financial Ratios	2013	2014	2015	Threshold Variance
<u>Qualification Status</u>	No POS Business	No POS Business	No POS Business	N/A
<u>Current Ratio</u>	1.42	1.39	0	>= 1
<u>Days in Working Capital</u>	25.42	25.18	0	>= 10
<u>Total Margin</u>	0.05	0.06	0	>= -5%
<u>Days in Cash</u>	46.30	53.86	0	>= 10
<u>Days in Receivable</u>	41.99	38.06	0	<= 90
<u>Days in Payables</u>	60.54	64.80	0	<= 60
<u>Debt Ratio</u>	0.22	0.22	0	> 50%

Figure 49: Highlighting the Financial Ratios page from the Qualification page.

2. Select any of the **links** in the first column to open the definitions page.

Information Qualification Contract Detail Surplus Revenue

PQ Year: 2016 PPA: DCF **Financial Ratios** Corrective Measures

Current Ratio	This ratio is a liquidity ratio and is an indicator of how well an organization can meet its current obligations, payroll, accounts payable, etc. A higher ratio indicates a liquid organization able to meet these current obligations. Like all liquidity ratios, one should also look at the non-liquid assets and liabilities, to see if they might have an effect on this ratio. Example, an organization may have a bad ratio here, but have sizeable amounts of money in Investments, that is not a factor in determining this ratio. Formula: Total Current Assets (Sop Line 11) / Total Current Liabilities (Sop Line 26)
Days in Working Capital	The days in working capital is an indication of how much of the short-term financial resources will be left over if all of the organization's short-term financial obligations are paid off. Generally, the more days in working capital, the better. Formula: Total Current Assets (Line 11, SOP) less Total Current Liabilities (Line 26, SOP) * 365 / Total Expenses (Line 17, SOA) less Total Depreciation of Buildings and Equipment (Line 7, SFE)
Total Margin	The total margin ratio is the percentage calculated by dividing the excess of revenues less expenses, or Change in Net Assets (Net Income) by total revenues. The total margin provides a measure of an organization overall profitability utilizing its net income or loss. The higher the percentage the more profitable the organization is while a negative percentage indicates that the organization is losing assets and if this trend continues indicates the possible failure of this organization in surviving. Formula: = (Total Revenue (Soa Line 13)- Total Expense (Soa Line 19)) / Total Revenue (Soa Line 13)
Days in Cash	The days' cash is the number of days the organization can continue in operation if cash inflow stops. The more days in cash the better this organization is. Formula: (Total Cash (Sop Line 1) * 365) / (Total Expense (Soa Line 1) - Total Depreciation (Sfe Line 7))
Days in Receivable	Days in receivables are how long it takes an organization to receive the money for the services it sells. This is useful for determining how efficient the company is at receiving whatever short-term payments it is owed. Lower is better! Formula: Days In Receivables = (Net Accounts Receivable, Program Services (Sop Line 4) * 365) / Program Service Fees (Soa Line 4)
Days in Payables	Days in payables are how long it takes an organization to pay its bills. This is useful for determining how efficient the company is in paying its bills. Lower is better! While higher is generally not better, an organization able to delay payments to its vendors this without incurring penalties for late payments is financing its operations through its creditors willing to accept these late payments, a good thing. Formula: Days In Payables = (Total Current Liabilities (Sop Line 26) – Deferred Revenues (Sop Line 14) * 365) / (Total Expense (Soa Line 19) - Total Depreciation (Sfe Line 7))
Debt Ratio	This ratio provides an indication of how much of the organization assets are financed by debt. It also provides an indicator of how much of the organizations assets would be available to pay off debt in the event of liquidation. The lower this ratio indicates a healthy organization capable of assuming more debt to finance its operations. The downside of this ratio is that it relies on values of assets that may have been acquired at an earlier date and therefore their value as of the taking of this ratio may not be accurate. Formula: Total Liabilities (Sop Line 30) / Total Assets (Sop Line 18)

Figure 50: Financial Ratios page which is under Qualification.

3. Select **Back** to return to the main **Qualification** page or select **Return to search** to open the search page.

PDM Qualification – Corrective Measures

The Corrective Measures page is part of Provider Profile and contains Corrective measures along with comments.

Under the UFR Audit Findings section, if the Status field has a 'YES' this indicates that a checkmark was entered selected under the Qualification page for the Financial Ratios, Management Letter, Notes to Financials, or Other. While an optional field, it is recommended that the PPA enter an explanation under UFR Audit Findings when the status is 'YES'. Select **Edit** at the bottom of the page

Concerns/Issues	Status	If Yes, Explanation Required
Internal Control	No	
Compliance	No	
Financial Ratios	Yes	
Management Letter	Yes	
Notes to Financials	No	
Other	No	

Figure 51: Corrective Measures page highlighting the Concerns/Issues which requires explanation when "Yes" is displayed.

1. Type an explanation for each Concerns/Issues with a 'Yes' in the Status field.
2. Select the **Save** button.

Concerns/Issues	Status	If Yes, Explanation Required
Internal Control	No	
Compliance	No	
Financial Ratios	Yes	Enter Explanation for Financial Ratios
Management Letter	Yes	Enter Explanation for Management Letter
Notes to Financials	No	

Financial Audit Findings:

Figure 52: Completed Concerns/Issues section under Corrective Measures page.

The **Corrective Action Plan** is updated by data on the UFR and by OSD/CIW. This is a View only section.

Corrective Action Plan	
CAP Filed with UFR	Yes
CAP Due Date	01/01/1900
Date CAP Received by OSD/CIW	01/01/1900

Figure 53: Corrective Action Plan section under the Corrective Measures page.

The **Audit Records (OSA AUDIT)** section can be updated by the PPA.

1. Type the **Audit Number**.
2. Type the **Issue Date**. (Format: DD/MM/YYYY or
3. Select the **CAP Status**. (Options: Open or Close)
4. Type the **Audit Resolution Summary**.
5. Select **Financial Audit Findings**. (Options: Yes or No)
6. Select the **Add Audit Record**.

Audit Records (OSA AUDIT)	
Audit Number *	<input type="text" value="1231231231"/>
Issue Date *	<input type="text" value="10/01/2015"/> <input type="button" value="📅"/> *Issue date must be within PQ Year
CAP Status	<input type="text" value="Close"/>
Audit Resolution Summary *	<input type="text" value="Summary"/>
Financial Audit Findings	<input type="text" value="Yes"/>
<input type="button" value="Add Audit Record"/> <input type="button" value="Undo"/>	

Figure 54: Audit Records (OSA Audit) section under the Corrective Measures page.

PDM CONTRACT DETAILS

The Contract Detail page stores information about the POS Provider's contracts for the current fiscal year such as Activity Code, Activity Name, Doc ID, Object Code, Maximum Contract Obligation, Expended to Date, and Unexpended Amount. For Release 5.0 PDM will only display contracts with Object Codes MM3 and M03. The POS Program Operation role allows designated staff from within the organization to view this page. This role **does not** have Edit rights on this page.

Note: The information found under Contract Details is sourced from the Commonwealth's Information Warehouse. Information about services offered, but not contracted through EOHHS is entered by the provider.

This page provides the POS Program Operations staff with a snapshot of all of current year contracts, by EOHHS agency.

Provider Name: ABC Organization, INC		FEIN: XXXXXXXX		Last Updated from CIW/OSD:MM/DD/YYYY		
Information		Qualification		Contract Detail		Surplus Revenue
POS PROVIDER CONTRACT DETAIL (Sourced From The CIW)				Current Year - 2015		
DMH						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
3062	STABILIZATION, ASSESSMENT AND RAPID INTERGRATION	MMDMH12100151255KEYI	MM3	\$60,000.00	\$16,449.00	\$43,550.00
<i>Total</i>				<i>\$60,000.00</i>	<i>\$16,449.00</i>	<i>\$43,550.00</i>
DSS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
FNSS	Fam Networks Supp & Stab	INTF0000009951520320	M03	\$95,675.00	\$72,981.00	\$22,693.00
DVCB	DV Community Based	INTF0000009950720102	M03	\$78,723.00	\$65,042.00	\$13,680.00
FNST	Fam Networks STARR	INTF0000051901519892	M03	\$97,000.00	\$91,786.00	\$5,213.00
<i>Total</i>				<i>\$229,809.00</i>	<i>\$229,809.00</i>	<i>\$41,586.00</i>
DSS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
FNSS	Fam Networks Supp & Stab	INTF0000009951520320	M03	\$95,675.00	\$72,981.00	\$22,693.00
DVCB	DV Community Based	INTF0000009950720102	M03	\$78,723.00	\$65,042.00	\$13,680.00
FNST	Fam Networks STARR	INTF0000051901519892	M03	\$97,000.00	\$91,786.00	\$5,213.00
<i>Total</i>				<i>\$229,809.00</i>	<i>\$229,809.00</i>	<i>\$41,586.00</i>
DYS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
2507	Alternative lock - Up	SCDYS964021209063014	M03	\$2,029,507.00	\$1,833,333.00	\$196,173.00
2522	Staff Secure Detention	SCDYS920513120663016	M03	\$822,232.00	\$437,871.00	\$384,361.00
2501	Hardware Secure Detention	SCDYS920513120663016	M03	\$520,531.00	\$520,531.00	\$0.00
2503	Staff Secure Treatment	SCDYS910813120363016	M03	\$1,520,922.00	\$1,466,122.00	\$54,800.00
<i>Total</i>				<i>\$4,257,857.00</i>	<i>\$4,257,857.00</i>	<i>\$635,334.00</i>

Figure 55: Contract Detail page lists all contracts a provider has with EOHHS agencies.

PDM SURPLUS REVENUE

The Surplus Revenue page is primarily used by the Principal Purchasing Agency (PPA) to record and retain an account of the surplus revenue liability based on the Annual SSR of 5% limit. If an excess 5% Surplus Revenue Liability exists, the Principal Purchasing Agency utilizes the corresponding fields below to provide an accounting of the negotiation with the Provider to satisfy the liability owed the Commonwealth.

Information	Qualification	Contract Detail	Surplus Revenue
Surplus Revenue			
Last updated from OSD:		06/23/2015	
PQ Year	2011	<input type="button" value="update"/>	
SRR Summary for FY		2009	
Organization Type		Not for profit	
PPA Agency		DMR	
Liability based on Annual SRR 5 % Limit		\$44,497.29	
Date of Agency/Provider Agreement		10/07/2015	
Provider will reimburse the commonwealth by			
Cash Reimbursement		\$0.00	
Free Care		\$44,497.29	
Adjusted Unit rate Contract		\$0.00	
Other(*notes in comments)		\$0.00	
Costs Offset Refiled UFR		\$1.00	
Estimated Date Reimbursement will be completed		06/30/2011	
Date Reimbursement completed			
5 % Excess SRR Grand Total Planed Agency Recoveries		-1.0	
<input type="button" value="Edit"/>		<input type="button" value="Return to search"/>	

Figure 56: PDM Surplus Revenue page.

A user assigned the POS Program Operation role can edit the following fields on the Surplus Revenue page:

- Date of Agency/Provider Agreement
- Cash Reimbursement
- Free Care
- Adjusted Unit Rate Contract
- Other (*notes in comments)
- Costs Offset Refiled UFR
- Estimated Date Reimbursement will be completed
- Date Reimbursement completed
- Comments

After entering in the information, the PPA selects the **Save** button.

Provider Name: ABC Organization, Inc.		FEIN: XXXXXXXXX	Last Updated from CIW: 06/11/2010
Information	Qualification	Contract Detail	Surplus Revenue
Surplus Revenue			
Last updated from OSD:	06/23/2015		
PQ Year	2011		
SRR Summary for FY	2009		
Organization Type	Not for profit		
PPA Agency	DMR		
Liability based on Annual SRR 5 % Limit	44497.29		
Date of Agency/Provider Agreement *	<input type="text" value="10/07/2015"/> <input type="button" value="📅"/>		
Provider will reimburse the commonwealth by			
Cash Reimbursement	<input type="text" value="0.0"/>		
Free Care	<input type="text" value="44497.29"/>		
Adjusted Unit rate Contract	<input type="text" value="0.0"/>		
Other(*notes in comments)	<input type="text" value="0.0"/>		
Costs Offset Refiled UFR	<input type="text" value="1.0"/>		
Estimated Date Reimbursement will be completed *	<input type="text" value="06/30/2011"/> <input type="button" value="📅"/>		
Date Reimbursement completed	<input type="text"/> <input type="button" value="📅"/>		
5 % Excess SRR Grand Total Planed Agency Recoveries	-1.0		
Comments			
Comment	<input type="text"/>		
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>	

Figure 57: PDM Surplus Revenue page in Edit mode.

This page is intentionally left blank

Chapter 5: DDS Program Operations and DDS Operations Observer Roles

OVERVIEW

The DDS Program Operations and DDS Operations Observer have access to and maintain the Service Directory in PDM. The Service Directory is a tool for consumers, their families, and circle of support to search for services and service providers in the Commonwealth of Massachusetts. The data in the Service Directory is maintained in PDM by users assigned the DDS Program Operations role and they have the ability to add, modify and delete data in the Service Directory pending approval from appropriate source within DDS. Clients looking for provider services in their area can be referred to the Service Directory website at <https://service.hhs.state.ma.us/pdm4public/ssdHome.jsp>.

DDS Program Operations: This role allows designated DDS Program staff access to the Providers associated to DDS waivers and services. These users will have access to add and manage providers, as well as waiver services. In addition they will have the capability to manage the Providers Service Directory Profile. Finally, they will have access to reports menu.

DDS Operations Observer: This role allows designated DDS staff to view only Provider information and predefined reports.

PDM Security Role	Service Directory
DDS Program Operations	Add/Edit/Delete/View
DDS Operations Observer	View

Reminders When Using PDM:

- All fields denoted with an asterisk (*) are required fields and must be completed in order to save the record.
- Do not save a record until all sections are completed. If the user tries to save before completing all required fields within each section, the user will receive error messages at the top of the page listing the missing data.
- If you attempt to navigate to another page while in **Edit** mode without saving, you will receive a warning message (different text depending on the web browser you are working in) such as:
 - **Firefox:** "This page is asking you to confirm that you want to leave – data you have entered may not be saved."
 - **Internet Explorer:** "Are you sure you want to navigate away from this page? This page is asking you to confirm that you want to leave – data you have entered may not be saved. Press OK to continue, or Cancel to stay on the current page."

For guidance on using JAWS with PDM, refer to **Appendix B: JAWS Commands**.

PROVIDER SEARCH

The DDS Program Operations and DDS Operations Observer both have the ability to search for providers. In order to view provider records in PDM a search is required. The Search page is accessed by selecting Manage Provider from the Navigation menu.

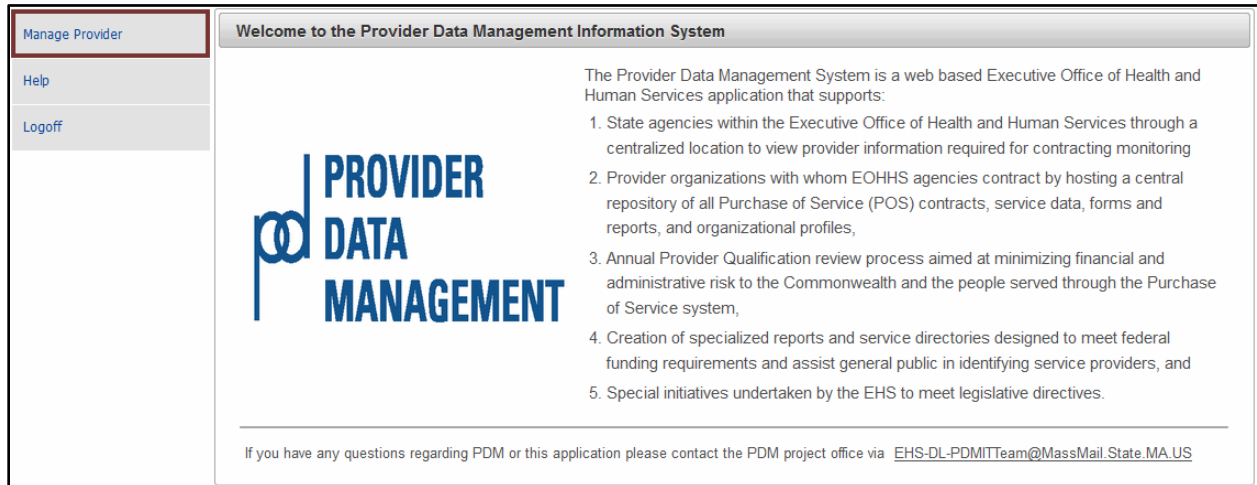


Figure 58: Welcome to the Provider Data Management Information System page.

The **Provider Search** page allows users to search for entries in three ways:

1. FEIN (Federal Employee Identification Number)
2. Name (Provider Name)
3. Waiver Program (Specific DDS program)

The screenshot shows the 'Provider Search' page. It has a header 'Provider Search'. Below the header are three input fields: 'FEIN' with an empty text box, 'NAME' with an empty text box, and 'Waiver Program' with a dropdown menu showing 'ALL'. Below the input fields are two buttons: 'Search' and 'Clear'.

Figure 59: Provider Search page.

Search by FEIN:

1. Type in **FEIN**. (9-digits in length)
2. Select the **Search** button.

The screenshot shows the 'Provider Search' interface. The search criteria are: FEIN: XXXXXXXXX, NAME: (empty), Waiver Program: ALL. The search results table is as follows:

Name	FEIN	Waiver Program
Training Consortium, Inc.	XXXXXXXXXX	Adults Services

Figure 60: Provider Search page returns with results based off of entered criteria - FEIN.

Search by Name:

1. Type in **Name** (Full or Partial name).

Note: Wildcard Search, the * (asterisk) can be used as a wildcard in the name field to search for a provider. If you are unsure of the full name of the provider, or want to see all the options using a portion of a name, use the wild card to search. (i.e. ***key** will produce *Catherine Key*, **Berkshire*** will produce *Berkshire Community Center* etc., ***education*** will produce any provider who has the word *education* in their organization name.)

2. Select the **Search** button.

The screenshot shows the 'Provider Search' interface. The search criteria are: FEIN: (empty), NAME: valley, Waiver Program: ALL. The search results table is as follows:

Name	FEIN	Waiver Program
Valley Education Inc	XXXXXXXXXX	Adults Services
Valley Regional Services Inc	XXXXXXXXXX	Adults Services

Figure 61: Provider Search page returns with results based off of entered criteria - Name.

Search by Waiver:

1. Select the **Waiver Program** drop down menu.

Available Programs:

- ALL (Default)
- Adults Services
- Autism Spectrum Services

2. Select the **Search** button.

The screenshot shows two instances of the 'Provider Search' form. The top instance shows the search criteria: FEIN and NAME fields are empty, the 'Waiver Program' dropdown is set to 'Autism Spectrum Service', and the 'Search' button is highlighted. The bottom instance shows the search results table.

Name	FEIN	Waiver Program
ABC Organization, Inc.	XXXXXXXXXX	Autism Spectrum Services
Family Assistance, Inc.	XXXXXXXXXX	Autism Spectrum Services
Help, Inc.	XXXXXXXXXX	Autism Spectrum Services
Making Strives, Inc.	XXXXXXXXXX	Autism Spectrum Services

Figure 62: Provider Search page returns with results based off of entered criteria - Waiver Program.

SERVICE DIRECTORY

Once the Provider Search is executed and requested results are displayed, the user selects the Provider record by clicking in the row which redirects the user to the Service Directory page.

The Service Directory page lists the following information:

- Provider's Details
- Other Contact Information
- Service Information

Users assigned the DDS Program Operations role have Read rights access along with add/modify in the Service Directory. The DDS Observer has Read rights only.

Based on assigned role, the Service Directory page will display the following buttons at the bottom of the page:

- **DDS Program Operations:** Edit and Return to Search
- **DDS Observer:** Return to Search

Service Directory

Provider's Details

Name	ABC Organization, Inc.
FEIN	XXXXXXXX
Address	1250 Anytown Street Anytown, MA 00000-0000
Phone and Ext	(555) 555-1212
Website	www.abcorganization.com
Email	Jane.Provider@organization.com

Other Contact Information

Name	Jane Provider
Phone and Ext	(555) 555-1212
Email	Jane.Provider@organization.com

Service Information

Service(s)
Displaying Page 1 of 2

First	Previous	1	2	Next	Last
-----------------------	--------------------------	-------------------	-------------------	----------------------	----------------------

Program Name	Service Name	Service Type	Start Date
Adults Services	Adult Companion - SD	Support	2015-09-01
Adults Services	Assistive Technology Contract	Support	2015-09-19
Adults Services	Chore - SD	Support	2015-09-18
Adults Services	Community/Residential Peer Supports	Support	2010-06-30
Adults Services	Emergency Stabilization Residence	Residential	2015-09-02
Autism Spectrum Services	Expanded Habilitation Services - Education-Therapist	Support	2015-09-23
Adults Services	Family Support Navigation	Support	2010-06-30
Autism Spectrum Services	Family Training	Support	2015-09-17
Adults Services	Homemaker	Support	2010-06-30
Adults Services	Individual Home Supports	Support	2010-06-30

Languages(s) Albanian, American Sign Language, Armenian, Bosnian, Creole Haitian, Dutch, English

City/Town(s) Abington, Acton, Acushnet, Adams, Agawam, Alford, Allston, Amherst, Ashburnham, Ashby, Ashfield, Ashland, Assonet, Athol, Attleboro, Auburn, Avon, Ayer, Baldwinville, Barnstable, Barre, Beacon Hill, Becket, Belchertown, Bellingham, Belmont, Berkley, Berlin, Bernardston, Blackstone, Blandford, Bolton, Boston, Bourne, Boylston, Braintree, Brewster, Bridgewater, Brighton, Brimfield, Brockton, Brookfield, Brookline, Buckland, Cambridge, Canton, Carver, Charlemont, Charlestown, Charlton, Chatham, Chelsea, Cherryvalley, Cheshire, Chester, Chesterfield, Chestnut Hill, Chicopee, Chilmak, Chinatown, Clarksburg, Clinton, Cohasset, Colrain, Conway, Cummington, Dalton, Dartmouth, Dedham, Deerfield, Dennis, Dighton, Dorchester, Douglas, Dover, Downtown Crossing, Dudley, Duxbury, East Boston, East Bridgewater, East Brookfield, East Douglas, East Longmeadow, East Princeton, East Templeton, Easthampton, Easton, Edgartown, Egremont, Erving, Fairhaven, Fall River, Falmouth, Fitchburg, Florida, Foxboro, Framingham, Franklin, Freetown, Gardner, Gay Head, Gilbertville, Gill, Goshen, Gosnold, Grafton, Granby, Granville, Great Barrington, Greenfield, Groton, Hadley, Halifax, Hampden, Hancock, Hanover, Hanson, Hardwick, Harvard, Harwich, Hatfield, Hawley, Heath, Hingham, Hinsdale, Holbrook, Holden, Holland, Holliston, Holyoke, Hopedale, Hopkinton, Hubbardston, Hudson, Hull, Huntington, Hyannis, Hyde Park, Jamaica Plain, Jefferson, Kingston, Lakeville, Lancaster, Lanesboro, Lee, Leicester, Lenox, Leominster, Leverett, Leyden, Linwood, Longmeadow, Ludlow, Lunenburg, Mansfield, Marion, Marlborough, Marshfield, Mashpee, Mattapan, Mattapoisett, Medfield, Medway, Mendon, Middleboro, Middlefield, Milford, Millbury, Miller's Falls, Millis, Millville, Milton, Monroe, Monson, Montague, Montgomery, Mount Washington, Nantucket, Natick, Needham, New Ashford, New Bedford, New Braintree, New Marlboro, New Salem, Newton, Norfolk, North Adams, North Attleboro, North Brookfield, North End, Northampton, Northborough, Northbridge, Northfield, Norton, Norwell, Norwood, Oak Bluffs, Oakham, Orange, Orleans, Otis, Oxford, Palmer, Paxton, Pelham, Pembroke, Pepperell, Peru, Petersham, Phillipston, Pittsfield, Plainfield, Plainville, Plymouth, Plympton, Princeton, Provincetown, Quincy, Randolph, Raynham, Rehoboth, Revere, Richmond, Rochdale, Rochester, Rockland, Roslindale, Rowe, Roxbury, Royalston, Russell, Rutland, Sandisfield, Sandwich, Savoy, Scituate, Seekonk, Sharon, Sheffield, Shelburne, Sherborn, Shirley, Shrewsbury, Shutesbury, Somerset, Somerville, South Barre, South Boston, South Hadley, South Lancaster, Southampton, Southborough, Southbridge, Southwick, Spencer, Springfield, Sterling, Still River, Stockbridge, Stoughton, Sturbridge, Sudbury, Sunderland, Sutton, Swansea, Taunton, Templeton, Tisbury, Tolland, Townsend, Truro, Turners Falls, Tyringham, Upton, Uxbridge, Wales, Walpole, Waltham, Ware, Wareham, Warren, Warwick, Washington, Watertown, Wayland, Webster, Wellesley, Wellfleet, Wendell, West Boylston, West Bridgewater, West Brookfield, West Roxbury, West Springfield, West Stockbridge, West Tisbury, West Townsend, Westborough, Westfield, Westhampton, Westminster, Weston, Westport, Westwood, Weymouth, Whately, Whitinsville, Whitman, Wilbraham, Williamsburg, Williamstown, Winchendon, Windsor, Winthrop, Worcester, Worthington, Wrentham, Yarmouth

Edit

Return to search

Figure 63: Service Directory page with Edit button highlighted.

UPDATE SERVICE DIRECTORY

A user with the DDS Program Operations role has the access rights to add/modify/delete information on the Service Directory page.

Provider's Details

Note: The Name and FEIN fields are not editable. The data comes from the Commonwealth's Information Warehouse (CIW).

Under **Provider's Detail** the following fields can be edited by a user with the DDS Program Operations role:

- Address Line 1 *, Address Line 2
- City *, State *, Zip *
- Phone and Ext *
- Website, Email

If only updates to the **Provider's Detail** section are needed,

- Select the **Edit** button.
- Update information as needed.
- Select the **Save** button.

Other Contact Information

Under **Other Contact Information** the following fields can be edited by a user with the DDS Program Operations role:

- First *, Last *
- Phone and Ext *
- Email

If only updates to the **Other Contact Information** section are needed,

- Select the **Edit** button.
- Update information as needed.
- Select the **Save** button.

Service Directory			
Provider's Details			
Name	ABC Organization, INC	FEIN	XXXXXXXX
Address Line 1 *	<input type="text" value="1250 Anytown Street"/>	Address Line 2	<input type="text" value="Suite A"/>
City *	<input type="text" value="Anytown"/>	State *	<input type="text" value="MA"/>
Zip *	<input type="text" value="00000"/>	Phone and Ext *	<input type="text" value="(555) 555-1212"/>
Website	<input type="text" value="www.abctorganization.com"/>	Email	<input type="text" value="Jane.Provider@organization.com"/>
Other Contact Information			
First *	<input type="text" value="Jane"/>	MI	<input type="text"/>
Last *	<input type="text" value="Provider"/>	Phone and Ext *	<input type="text" value="(555) 555-1212"/>
Email	<input type="text" value="Jane.Provider@organization.com"/>		

Figure 64: Service Directory page with Provider's Details and Other Contact Information displayed.

Service Information

The Service Information section (when in Edit mode) allows a user to add/modify/delete service information.

Searching for an Existing Service

The **Select Service** section in the Service Directory displays 10 records at a time on the page. If more than 10 records exist the user should use the link **First Previous 1 2 Next Last** to navigate and locate the record.

There are two buttons under the Service Information section:

- **Add/Modify Service:** To save or modify a record in Service Directory.
- **Delete Service:** To delete a record in Service Directory.

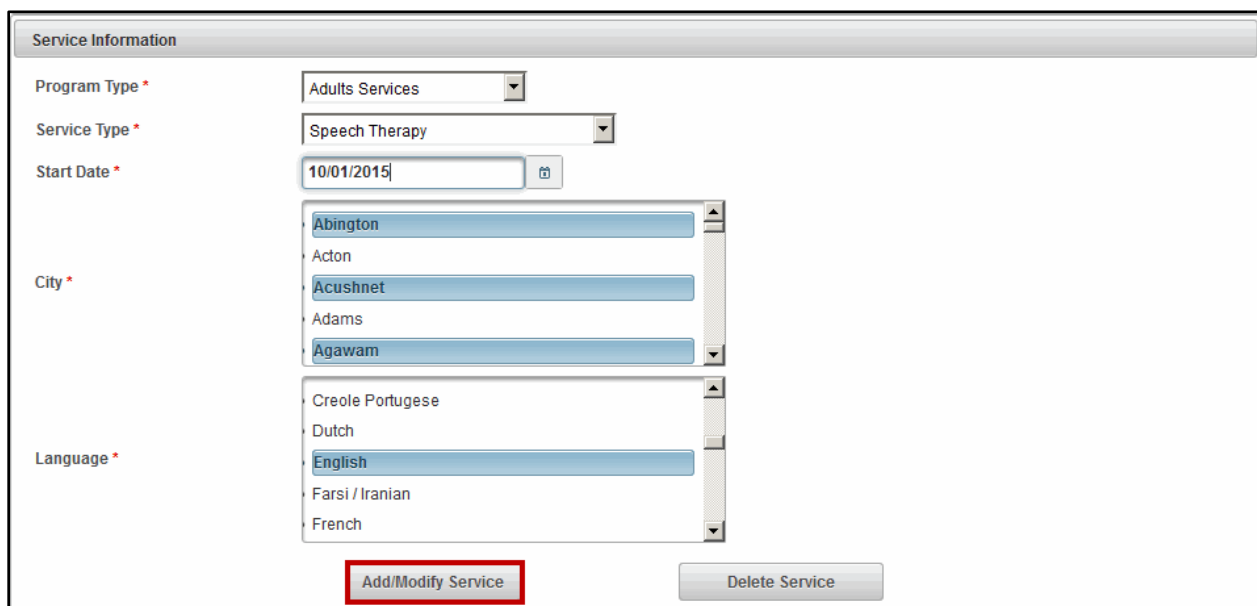
Select Service		Displaying Page 1 of 2	
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="Next"/> <input type="button" value="Last"/>			
Program Name	Service Name	Service Type	Start Date
Adults Services	Adult Companion - SD	Support	2015-09-01
Adults Services	Assistive Technology Contract	Support	2015-09-19
Adults Services	Chore - SD	Support	2015-09-18
Adults Services	Community/Residential Peer Supports	Support	2010-06-30
Adults Services	Emergency Stabilization Residence	Residential	2015-09-02
Autism Spectrum Services	Expanded Habilitation Services - Education-Therapist	Support	2015-09-23
Adults Services	Family Support Navigation	Support	2010-06-30
Autism Spectrum Services	Family Training	Support	2015-09-17
Adults Services	Homemaker	Support	2010-06-30
Adults Services	Individual Home Supports	Support	2010-06-30
<input type="button" value="Add/Modify Service"/>		<input type="button" value="Delete Service"/>	

Figure 65: Service Directory page displayed with highlight around First Previous Next Last navigation links and the Add/Modify Service and Delete buttons.

ADD SERVICE

When a new service needs to be added a user with the DDS Program Operations role can add the service to the Service Directory.

1. Search and select Provider from the **Provider Search** page.
2. Select the **Edit** button from the **Service Directory** page.
3. Select the **Program Type *** from the drop down menu.
4. Select the **Service Type *** from the drop down menu.
5. Type in the **Start Date *** (Format: MM/DD/YYYY or select the Calendar icon to select the date)
6. Select the **City *** (To select multiple cities use Shift + click).
7. Select the **Language *** (To select multiple languages use Shift + click).
8. Select the **Add/Modify Service** button.



The screenshot shows a web form titled "Service Information". It contains several fields with dropdown menus and a date picker. The "Program Type" dropdown is set to "Adults Services". The "Service Type" dropdown is set to "Speech Therapy". The "Start Date" field contains "10/01/2015" and has a calendar icon. The "City" field is a multi-select dropdown with "Abington", "Acton", "Acushnet", "Adams", and "Agawam" selected. The "Language" field is a multi-select dropdown with "Creole Portugese", "Dutch", "English", "Farsi / Iranian", and "French" selected. At the bottom of the form, there are two buttons: "Add/Modify Service" (highlighted with a red box) and "Delete Service".

Figure 66: Service Directory page displayed with highlight around Add/Modify Service button.

PDM will return the validation message **"Service added successfully."**

MODIFY SERVICE

If a service needs to be modified due to a change in the Start Date or when an additional City or Language needs to be added a user with the DDS Program Operations role can modify an existing service on the Service Directory.

1. Search and select Provider from the **Provider Search** page.
2. Select the **Edit** button.
3. Locate and select service to be modified from the **Select Service** section.

Note: The Program Type and Service Type fields are not editable when modifying a service.

4. Update the **Start Date *** field, if needed (Format: MM/DD/YYYY or select the Calendar icon to select the date)
5. Update the **City *** field, if needed (To select multiple cities use Shift + click).
6. Update the **Language *** field, if needed (To select multiple languages use Shift + click).

7. Select the **Add/Modify Service** button.

The screenshot displays the 'Service Information' form with the following fields:

- Program Type * : Autism Spectrum Services
- Service Type * : Select Service
- Start Date * : 09/28/2015
- City * : Agawam
- Language * : Bosnian

Buttons: Add/Modify Service (highlighted), Delete Service

Select Service | Displaying Page 1 of 2

Program Name	Service Name	Service Type	Start Date
Adults Services	Adult Companion - SD	Support	2015-09-01
Adults Services	Assistive Technology Contract	Support	2015-09-19
Adults Services	Chore - SD	Support	2015-09-18
Adults Services	Community/Residential Peer Supports	Support	2010-06-30
Adults Services	Emergency Stabilization Residence	Residential	2015-09-02
Autism Spectrum Services	Expanded Habilitation Services - Education-Therapist	Support	2015-09-23
Adults Services	Family Support Navigation	Support	2010-06-30
Autism Spectrum Services	Family Training	Support	2015-09-17
Adults Services	Homemaker	Support	2010-06-30
Adults Services	Individual Home Supports	Support	2010-06-30

Figure 67: Service Directory page displayed with highlights around Add/Modify Service fields.

PDM will return the validation message **“Service modified successfully.”**

DELETE SERVICE

If a service needs to be deleted a user with the DDS Program Operations role has the access to delete a service from the Service Directory.

1. Search and select the provider from Provide Search page.
2. Under Service Information, locate and select the service to be deleted from the **Select Service** listing.
3. Select the **Delete Service** button.

Service Information

Program Type *

Service Type *

Start Date *

City *

Language *

Select Service Displaying Page 2 of 2

Program Name	Service Name	Service Type	Start Date
Adults Services	Occupational Therapy - SD	Support	2015-09-02
Adults Services	Placement Services T-2	Residential	2010-06-30
Adults Services	Residential Habilitation	Residential	2010-06-30
Adults Services	Respite - Adult - In recipient's home	Support	2010-06-30
Adults Services	Respite - Adult - Site-based	Support	2010-06-30
Adults Services	Respite - Adult - in caregiver's home	Support	2010-06-30
Adults Services	Speech Therapy	Support	2015-10-01

Figure 68: Service Directory page displayed with highlights around the Delete Service fields.

PDM will return the validation message: **“Service deleted successfully.”**

Note: All fields denoted with an asterisk (*) are required fields and must be completed in order to save the record.

Chapter 6: PDM Contracted Providers Operations and Observer Provider Roles

OVERVIEW

The PDM Contracted Providers Operations and PDM Observer Provider roles allow designated staff from within their organization to view and edit information in PDM.

PDM Contracted Providers Operations: This role allows providers access to their PDM record only. Providers with this access have the capability to edit and update company profile information. Access will include the ability to upload and replace required documents. This role will also have access to provider specific reports. (May have access to Salary Reserve functionality - to follow in later release).

PDM Observer Provider: This role allows providers access to VIEW only the provider's PDM company profile information. This role will have access to designated reports specific to the provider's company business with EOHHS.

PDM Role	Information	Qualifications (Including Financial Ratio and Corrective Measures)	Contract Detail	Surplus Revenue
PDM Contracted Providers Operations	View/Edit	View	View	View
PDM Observer Provider	View	View	View	View

Reminders When Using PDM:

- All fields denoted with an asterisk (*) are required fields and must be completed in order to save the record.
- Do not save a record until all sections are completed. If the user tries to save before completing all required fields within each section, the user will receive error messages at the top of the page listing the missing data.
- If you attempt to navigate to another page while in **Edit** mode without first saving you will receive a warning message (different text depending on the web browser you are working in) such as:
 - **Firefox:** "This page is asking you to confirm that you want to leave – data you have entered may not be saved."
 - **Internet Explorer:** "Are you sure you want to navigate away from this page? This page is asking you to confirm that you want to leave – data you have entered may not be saved. Press OK to continue, or Cancel to stay on the current page."

For guidance on using JAWS with PDM, refer to **Appendix B: JAWS Commands**.

PDM INFORMATION

The Information tab stores information about a Provider such as Corporate Contact Information, Provider's PDM Contact, Executive Contact, and General Corporate Information (Mission Statement and Corporate Description).

When a provider selects the 'Manage Provider' from the Welcome page they are automatically redirected to the Provider page (no search is required) and defaults to the Information page.

Users assigned the PDM Contracted Providers Operations role have Edit and Read rights on the Information page. The PDM Observer Provider has View rights only.

The Information page has the following button located at the bottom of the page:

- **Edit:** The Edit button will appear for users with the PDM Contracted Providers Operations role.
- No button will display for users with the PDM Observer Provider role.

Provider Name: ABC Organization, Inc.		FEIN: XXXXXXXXX	Last Updated from CIW/OSD: 09/04/2015
Information	Qualification	Contract Detail	Surplus Revenue
Corporate Contact Information			
Legal Address (sourced from CIW)	1250 ANY STREET, SUITE A ANYTOWN MASSACHUSETTS USA 00000	Alternate Address	1250 Any Street Suite A Anytown Massachusetts USA 00000
Phone		Phone	(555) 555-1212 x1234
		Fax	(555) 555-1414
		Email	
		Website	http://www.abctorganization.com
Provider's PDM Contact			
Name	Jane Provider	Phone	(555) 555-1515 x9876
Email	Jane.Provider@organization.com	Fax	(555) 555-1414
Executive Contacts			
CEO/Executive Director			
CEO/Executive Director	William Provider		
Phone	(555) 555-1717 x2587	Email	William.Provider@organization.com
Chief Financial Officer			
Chief Financial Officer	Ronald Provider		
Phone	(555) 555-1818 x5478	Email	Ronald.Provider@organziation.com
General Corporate Information			
Mission Statement	ABC Organization's mission is to assist troubled youth and their families with developing positive life skills and life experiences so that they may pursue productive and rewarding lives.		
Corporate Description	The ABC Organization Inc is a private, non-profit, tax-exempt agency that provides youth and family services throughout Massachusetts and Rhode Island. Grounded in a strength-based philosophy, ABC focuses on unlocking the potential of youth and families. Through a variety of residential and non-residential program models and settings, ABC provides direct services each day to over 600 adolescents from the child welfare, mental health, juvenile justice, and educational systems. We create opportunities for those in our various programs to learn new skills and approaches to problem solving.		
Edit			

Figure 69: PDM Information page with Edit button highlighted.

Corporate Contact Information

Under **Corporate Contact Information** the following fields can be edited by a user with the PDM Contracted Providers Operations role:

- Alternate Address
- Phone, Fax
- Email, Website

Note: The Provider Name, FEIN and Legal Address fields are not editable. This data comes from the Commonwealth's Information Warehouse (CIW).

The screenshot shows a web form titled "Corporate Contact Information". At the top, it displays "Provider Name: ABC Organization, Inc.", "FEIN: XXXXXXXXX", and "Last Updated from CIW/OSD: 09/04/2015". The form is divided into two main sections. The left section contains "Legal Address (sourced from CIW)" with the value "1250 ANY STREET, SUITE A ANYTOWN MASSACHUSETTS USA 00000" and a "Phone" field. The right section, highlighted with a red border, contains several input fields: "Alternate Address" (1250 Any Street), "Address Line 2" (Suite A), "City" (Anytown), "State" (MA), "Zip" (00000), "Phone" ((555) 555-1212 x12345), "Fax" ((555) 555-1414), "Email" (empty), and "Website" (http://www.abcorganization.).

Figure 70: Fields that can be updated on Information > Corporate Contact Information section of the Information page.

If only updates to the **Corporate Contact Information** section are needed, select the **Save** button at the bottom of the page.

Provider's PDM Contact

Under Provider's PDM Contact the following fields can be edited by a user with the PDM Contracted Providers Operations role:

- First, Middle, and Last
- Phone, Email, Fax

The screenshot shows a web form titled "Provider's PDM Contact". It contains several input fields arranged in two rows. The first row includes "First" (Jane), "MI" (empty), and "Last" (Provider). The second row includes "Phone" ((555) 555-1515 x98765), "Email" (Jane.Provider@organization), and "Fax" ((555) 555-1414). A red border highlights the entire form area.

Figure 71: Fields that can be updated on Information > Provider's PDM Contact section of the Information page.

If only updates to the Provider's PDM Contact section are needed, select the **Save** button at the bottom of page.

Executive Contacts

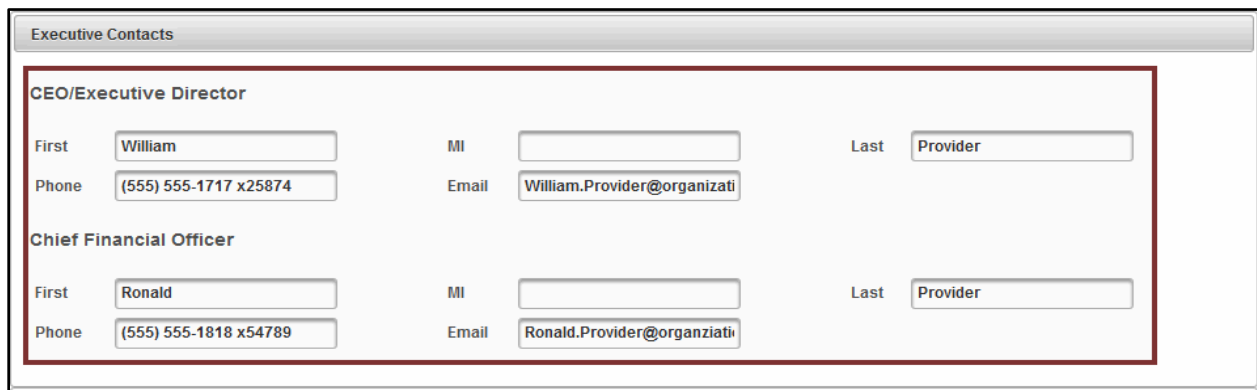
Under **Executive Contacts** > CEO/Executive Director the following fields can be edited by a user with the PDM Contracted Providers Operations role:

- First, Middle, and Last
- Phone, Email

Under **Executive Contacts** > Chief Financial Officer the following fields can be edited by a user with the PDM Contracted Providers Operations role:

- First, Middle, and Last
- Phone, Email

If only updates to the **Executive Contacts** section are needed, select the **Save** button at the bottom of page.



The screenshot shows a web form titled "Executive Contacts". It contains two sections: "CEO/Executive Director" and "Chief Financial Officer". Each section has input fields for "First", "MI", "Last", "Phone", and "Email". The CEO/Executive Director fields are: First: William, MI: (empty), Last: Provider, Phone: (555) 555-1717 x25874, Email: William.Provider@organizati. The Chief Financial Officer fields are: First: Ronald, MI: (empty), Last: Provider, Phone: (555) 555-1818 x54789, Email: Ronald.Provider@organizati.

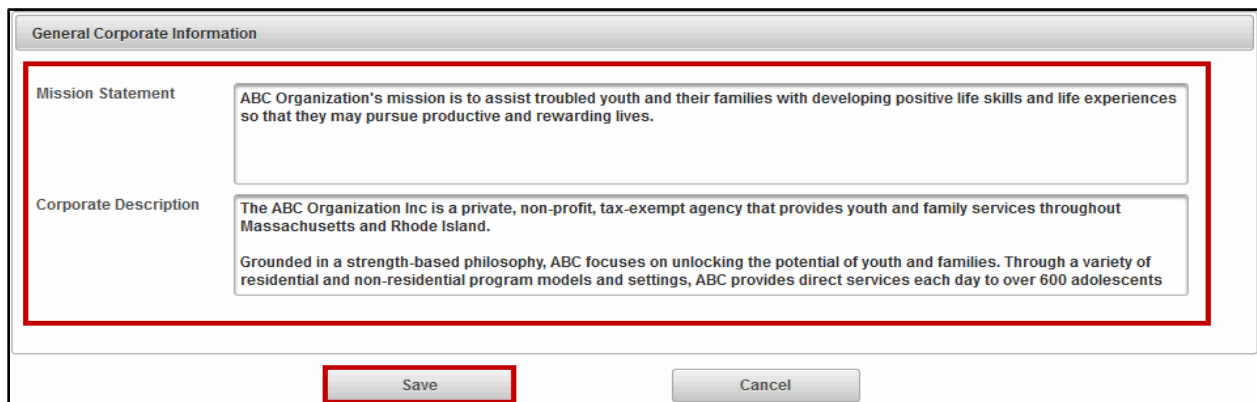
Figure 72: Fields that can be updated on Information > Executive Contacts section of the Information page.

General Corporate Information

Under **General Corporate Information** the following field can be edited by a user with the PDM Contracted Providers Operations role:

- Mission Statement
- Corporate Description

If only updates to the General Corporate Information section are needed, select the **Save** button at the bottom of page.



The screenshot shows a web form titled "General Corporate Information". It contains two text areas: "Mission Statement" and "Corporate Description". The Mission Statement text is: "ABC Organization's mission is to assist troubled youth and their families with developing positive life skills and life experiences so that they may pursue productive and rewarding lives." The Corporate Description text is: "The ABC Organization Inc is a private, non-profit, tax-exempt agency that provides youth and family services throughout Massachusetts and Rhode Island. Grounded in a strength-based philosophy, ABC focuses on unlocking the potential of youth and families. Through a variety of residential and non-residential program models and settings, ABC provides direct services each day to over 600 adolescents". At the bottom of the form, there are two buttons: "Save" and "Cancel".

Figure 73: Fields that can be updated on Information > General Corporate Information section on the Information page.

SERVICE DIRECTORY

Note: Only provider organizations that have contracts with DDS will see the Service Directory link under the Information page.

Once the Provider Search is executed and requested results are displayed, the user selects the Provider record by clicking in the row to display the Corporate Information page. To the right of the information page is the Service Directory link.

1. Select the **Service Directory** link.

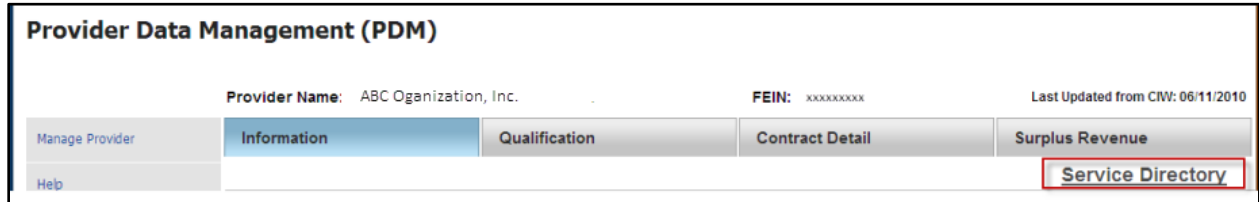


Figure 74: Service Directory link on the Information page.

The Service Directory page lists the following information:

- Provider’s Details
- Other Contact Information
- Service Information

The Provider Organization with DDS contracts has Read rights only to this information.

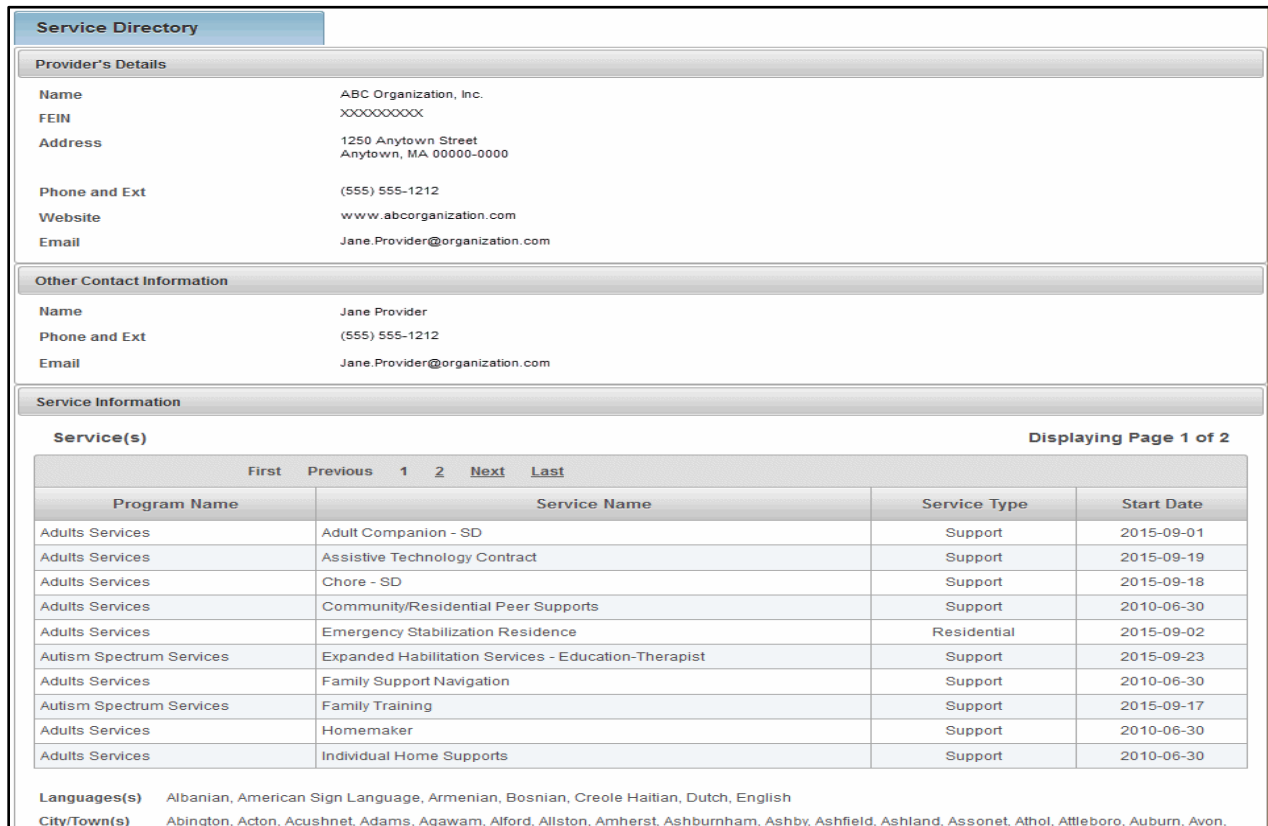


Figure 75: Service Directory page (view only).

Searching for an Existing Service

The **Select Service** section in the Service Directory displays 10 records at a time on the page. If more than 10 records exist the user should use the link **First Previous 1 2 Next Last** to navigate and locate the record.

Select Service		Displaying Page 1 of 2	
First Previous 1 2 Next Last			
Program Name	Service Name	Service Type	Start Date
Adults Services	Adult Companion - SD	Support	2015-09-01
Adults Services	Assistive Technology Contract	Support	2015-09-19
Adults Services	Chore - SD	Support	2015-09-18
Adults Services	Community/Residential Peer Supports	Support	2010-06-30
Adults Services	Emergency Stabilization Residence	Residential	2015-09-02
Autism Spectrum Services	Expanded Habilitation Services - Education-Therapist	Support	2015-09-23
Adults Services	Family Support Navigation	Support	2010-06-30
Autism Spectrum Services	Family Training	Support	2015-09-17
Adults Services	Homemaker	Support	2010-06-30
Adults Services	Individual Home Supports	Support	2010-06-30

Figure 76: Service Directory page displayed with highlight around First Previous Next Last navigation links.

PDM QUALIFICATION

The PDM Qualification page is populated when the EOHS Principal Purchasing Agency (PPA) Provider Qualification Officer (PQO) completes the review process. The PDM system calculates the financial ratios field using data from Provider's UFR filing from OSD data feed and cannot be edited.

Users assigned the PDM Contracted Providers Operations role and PDM Observer Provider have View rights only to the Qualification page and associated links.

Provider Name: ABC Organization, Inc		FEIN: XXXXXXXX	Last Updated from CIW/OSD: 09/04/2015	
Information		Qualification	Contract Detail	
		Surplus Revenue		
		<u>Financial Ratios</u>		<u>Corrective Measures</u>
Qualification				
PQ Year	2016	<input type="button" value="Update"/>	PPA	DPH
For Profit	N		MEP Status	Single Entity
UFR Filer			FY 2014 POS Total Expenditure	\$26,156,389.83
Status				
Qualification Status	No POS Business	Date Qualification status Last Updated:	2014-11-26	
UFR Fiscal Year End date	2014-06-30	UFR Original Submission Date	2014-07-01	
Going Concern	N	A-133 Submitted	UFR-A133	
Internal Control Finding		Compliance Finding		
Exemption Type				
Concerns/Issues				
<input checked="" type="checkbox"/>	Financial Ratios	<input checked="" type="checkbox"/>	Management letter	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Notes To Financial	<input checked="" type="checkbox"/>	Other	
Comments				
Comments				
Comments			Commented By	Commented On
Comments on financial ratio.			DPH Agency Staff	10/02/2015
team is making audit review at this time - will update...			DPH Agency Staff	09/14/2015
No SDP form submitted with FY2014 UFR filing. Excess 20% SRR Liability waiver requested for \$1,296,976.			DPH Agency Staff	11/26/2014

Figure 77: PDM Qualification page.

Qualification – Viewing PQ Year

PDM maintains the current PQ year along with previous years. The Qualifications page defaults to the current PQ Year.

To view a prior PQ Year,

1. Select the **PQ Year** drop down arrow and select the **Year** to be viewed. (This example will select **2011**).
2. Select the **Update** button.

The screenshot shows a web interface for the 'Qualification' page. It features a dropdown menu for 'PQ Year' with options from 2010 to 2016, where 2011 is selected. To the right of the dropdown is an 'Update' button. Below these are several fields: 'PPA', 'DCF', 'For Profit', 'MEP Status', and 'Contracting Parent'. At the bottom, there is a section for 'Parent/Child/Affiliate Providers' with a dropdown menu also showing 2011 as the selected year.

Figure 78: Under the Qualifications page, changing the PQ Year to 2011 and selecting the Update button.

Note: Each time the PQ Year is selected it must be followed by selecting the update button to ensure all data is up to date per the selection.

Parent/Child/Affiliate Providers

The Parent/Child/Affiliate Providers section allows the user to view the other provider organizations associated to this provider.

Note: Parent/Child/Affiliate Providers information will only be visible if the Provider has Child or Affiliate Providers.

Parent/Child/Affiliate Providers					
Name	FEIN	PPA	UFR Filer	MEP Status	FY 2009 POS Total Expenditure
Key Program, Inc.	042539878		Y	CP	\$27,055,071.72
Alternatives for Youth, Inc.	043276173		N	NC	\$0.00

Figure 79: Parent/Child/Affiliate Providers section under the Qualification page.

3. Select record to view. The user will be redirected to the **PDM Information** page for that provider organization.

PDM Qualification - Financial Ratios

The Financial Ratios page assists 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 Ratios 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 PDM Contracted Providers Operations and PDM Observer Provider roles allow designated staff from within the organization to view this page. This page is View only for all associated roles.

1. Select the **Financial Ratios** link

Provider Name: ABC Organization, Inc **FEIN:** XXXXXXXXX **Last Updated from CIW/OSD:** 09/04/2015

Information	Qualification	Contract Detail	Surplus Revenue
-------------	----------------------	-----------------	-----------------

PQ Year: 2016 PPA: DPH **Financial Ratios** Corrective Measures

Financial Ratios from UFR

Financial Ratios	2013	2014	2015	Threshold Variance
<u>Qualification Status</u>	No POS Business	No POS Business	No POS Business	N/A
<u>Current Ratio</u>	1.42	1.39	0	>= 1
<u>Days in Working Capital</u>	25.42	25.18	0	>= 10
<u>Total Margin</u>	0.05	0.06	0	>= -5%
<u>Days in Cash</u>	46.30	53.86	0	>= 10
<u>Days in Receivable</u>	41.99	38.06	0	<= 90
<u>Days in Payables</u>	60.54	64.80	0	<= 60
<u>Debt Ratio</u>	0.22	0.22	0	> 50%

Figure 80: Highlighting the Financial Ratios link on the Qualification page.

The Financial Ratio page displays the last 3 fiscal years prior to the PQ year selected.

2. Select any one of the **links** in the first column to open the Financial Ratios Definitions page.

Information	Qualification	Contract Detail	Surplus Revenue
PQ Year: 2016	PPA: DCF	Financial Ratios	<u>Corrective Measures</u>
Current Ratio	<p>This ratio is a liquidity ratio and is an indicator of how well an organization can meet its current obligations, payroll, accounts payable, etc. A higher ratio indicates a liquid organization able to meet these current obligations. Like all liquidity ratios, one should also look at the non-liquid assets and liabilities, to see if they might have an effect on this ratio. Example, an organization may have a bad ratio here, but have sizeable amounts of money in Investments, that is not a factor in determining this ratio.</p> <p>Formula: Total Current Assets (Sop Line 11) / Total Current Liabilities (Sop Line 26)</p>		
Days in Working Capital	<p>The days in working capital is an indication of how much of the short-term financial resources will be left over if all of the organization's short-term financial obligations are paid off. Generally, the more days in working capital, the better.</p> <p>Formula: Total Current Assets (Line 11, SOP) less Total Current Liabilities (Line 26, SOP) * 365 / Total Expenses (Line17, SOA) less Total Depreciation of Buildings and Equipment (Line 7, SFE)</p>		
Total Margin	<p>The total margin ratio is the percentage calculated by dividing the excess of revenues less expenses, or Change in Net Assets (Net Income) by total revenues. The total margin provides a measure of an organization overall profitability utilizing its net income or loss. The higher the percentage the more profitable the organization is while a negative percentage indicates that the organization is losing assets and if this trend continues indicates the possible failure of this organization in surviving.</p> <p>Formula: = (Total Revenue (Soa Line 13)- Total Expense (Soa Line 19)) / Total Revenue (Soa Line 13)</p>		
Days in Cash	<p>The days' cash is the number of days the organization can continue in operation if cash inflow stops. The more days in cash the better this organization is.</p> <p>Formula: (Total Cash (Sop Line 1) * 365)/(Total Expense (Soa Line 1) - Total Depreciation (Sfe Line 7))</p>		
Days in Receivable	<p>Days in receivables are how long it takes an organization to receive the money for the services it sells. This is useful for determining how efficient the company is at receiving whatever short-term payments it is owed. Lower is better!</p> <p>Formula: Days In Receivables = (Net Accounts Receivable, Program Services (Sop Line 4) * 365) / Program Service Fees (Soa Line 4)</p>		
Days in Payables	<p>Days in payables are how long it takes an organization to pay its bills. This is useful for determining how efficient the company is in paying its bills. Lower is better! While higher is generally not better, an organization able to delay payments to its vendors this without incurring penalties for late payments is financing its operations through its creditors willing to accept these late payments, a good thing.</p> <p>Formula: Days In Payables = (Total Current Liabilities (Sop Line 26) – Deferred Revenues (Sop Line 14) * 365) / (Total Expense (Soa Line 19) - Total Depreciation (Sfe Line 7))</p>		
Debt Ratio	<p>This ratio provides an indication of how much of the organization assets are financed by debt. It also provides an indicator of how much of the organizations assets would be available to pay off debt in the event of liquidation. The lower this ratio indicates a healthy organization capable of assuming more debt to finance its operations. The downside of this ratio is that it relies on values of assets that may have been acquired at an earlier date and therefore their value as of the taking of this ratio may not be accurate.</p> <p>Formula: Total Liabilities (Sop Line 30) / Total Assets (Sop Line 18)</p>		
<input type="button" value="Back"/>			

Figure 81: Financial Ratios page which is located under the Qualification page.

3. Select **Back** to return to the **Financial Ratio** page.

PDM Qualification - Corrective Measures

The Corrective Measures page displays, by PQ Fiscal Year, the UFR Audit Findings, the Corrective Action Plan, and Audit Records (OSA Audit).

The PDM Contracted Providers Operations and PDM Observer Provider roles allow designated staff from within the organization to view this page. This page is View only for all associated roles.

Provider Name: ABC Organization, Inc **FEIN:** XXXXXXXXXX **Last Updated from CIW/OSD:** 09/04/2015

Information
Qualification
Contract Detail
Surplus Revenue

Financial Ratios
Corrective Measures

PQ Year: PPA: DPH

UFR Audit Findings

Concerns/Issues	Status	If Yes, Explanation Required
Internal Control	No	
Compliance	No	
Financial Ratios	Yes	
Management Letter	Yes	
Notes to Financials	Yes	
Other	Yes	

Corrective Action Plan

CAP Filed with UFR	No
CAP Due Date	01/01/1900
Date CAP Received by OSD/CIW	01/01/1900

Audit Records (OSA AUDIT)

Audit Record(s)

Audit Number	Issue Date	CAP Status	Audit Resolution Summary	Financial Audit Findings	Financial Audit Findings
2323	09/01/2015	Open	5555	Yes	Yes

Figure 82: Corrective Measures page.

Qualification – Viewing PQ Year

PDM maintains the current PQ year along with previous years. The Qualifications page defaults to the current PQ Year.

To view a prior PQ Year,

1. Select the **PQ Year** drop down arrow and select the **Year** to be viewed.
2. Select the **Update** button.

Provider Name: ABC Organization, Inc FEIN: XXXXXXXXX Last Updated from CIW/OSD: 09/04/2015

Information	Qualification	Contract Detail	Surplus Revenue
PQ Year: 2016		Update	PPA: DPH
<u>Financial Ratios</u>			Corrective Measures

Figure 83: Corrective Measures page with the PQ Year highlighted.

Note: Each time the PQ Year is selected it must be followed by selecting the update button to ensure all data is up to date per the selection.

PDM CONTRACT DETAILS

The Contract Detail page stores information about the POS Provider's contracts for the current fiscal year such as Activity Code, Activity Name, Doc ID, Object Code, Maximum Contract Obligation, Expended to Date, and Unexpended Amount. For Release 5.0 PDM will only display contracts with Object Codes MM3 and M03.

The PDM Contracted Providers Operations and PDM Observer Provider roles allow designated staff from within the organization to view this page. These roles **do not** have Edit rights on this page.

Note: The information found under Contract Details is sourced from the Commonwealth's Information Warehouse. Information about services offered, but not contracted through EOHHS is entered by the provider.

This page provides the Provider with a snapshot of all of current year contracts, by EOHHS agency.

Provider Name: ABC Organization, INC		FEIN: XXXXXXXX		Last Updated from CIW/OSD:MM/DD/YYYY		
Information		Qualification		Contract Detail		Surplus Revenue
POS PROVIDER CONTRACT DETAIL (Sourced From The CIW)						
Current Year - 2015						
DMH						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
3062	STABILIZATION, ASSESSMENT AND RAPID INTERGRATION	MMDMH12100151255KEYI	MM3	\$60,000.00	\$16,449.00	\$43,550.00
<i>Total</i>				<i>\$60,000.00</i>	<i>\$16,449.00</i>	<i>\$43,550.00</i>
DSS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
FNSS	Fam Networks Supp & Stab	INTF0000009951520320	M03	\$95,675.00	\$72,981.00	\$22,693.00
DVCB	DV Community Based	INTF0000009950720102	M03	\$78,723.00	\$65,042.00	\$13,680.00
FNST	Fam Networks STARR	INTF0000051901519892	M03	\$97,000.00	\$91,786.00	\$5,213.00
<i>Total</i>				<i>\$229,809.00</i>	<i>\$229,809.00</i>	<i>\$41,586.00</i>
DSS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
FNSS	Fam Networks Supp & Stab	INTF0000009951520320	M03	\$95,675.00	\$72,981.00	\$22,693.00
DVCB	DV Community Based	INTF0000009950720102	M03	\$78,723.00	\$65,042.00	\$13,680.00
FNST	Fam Networks STARR	INTF0000051901519892	M03	\$97,000.00	\$91,786.00	\$5,213.00
<i>Total</i>				<i>\$229,809.00</i>	<i>\$229,809.00</i>	<i>\$41,586.00</i>
DYS						
Activity Code	Activity Name	Doc ID	Object Code	Maximum Contract Obligation	Expended To Date	Unexpended Amount
2507	Alternative lock - Up	SCDYS964021209063014	M03	\$2,029,507.00	\$1,833,333.00	\$196,173.00
2522	Staff Secure Detention	SCDYS920513120663016	M03	\$822,232.00	\$437,871.00	\$384,361.00
2501	Hardware Secure Detention	SCDYS920513120663016	M03	\$520,531.00	\$520,531.00	\$0.00
2503	Staff Secure Treatment	SCDYS910813120363016	M03	\$1,520,922.00	\$1,466,122.00	\$54,800.00
<i>Total</i>				<i>\$4,257,857.00</i>	<i>\$4,257,857.00</i>	<i>\$635,334.00</i>

Figure 84: Contract Detail page lists all contracts a provider has with EOHS agencies.

PDM SURPLUS REVENUE

The Surplus Revenue page is primarily used by the Principal Purchasing Agency (PPA) to record and retain an account of the surplus revenue liability based on the Annual SSR of 5% limit. If an excess 5% Surplus Revenue Liability exists, the Principal Purchasing Agency utilizes the corresponding fields below to provide an accounting of the negotiation with the Provider to satisfy the liability owed the Commonwealth.

Provider Name: ABC Organization, Inc.		FEIN: XXXXXXXXX	Last Updated from CIW: 06/11/2010
Information	Qualification	Contract Detail	Surplus Revenue
Surplus Revenue			
Last updated from OSD:		06/23/2015	
PQ Year	2011	<input type="button" value="update"/>	
SRR Summary for FY	2009		
Organization Type	Not for profit		
PPA Agency	DMR		
Liability based on Annual SRR 5 % Limit	\$44,497.29		
Date of Agency/Provider Agreement	10/07/2015		
Provider will reimburse the commonwealth by			
Cash Reimbursement	\$0.00		
Free Care	\$44,497.29		
Adjusted Unit rate Contract	\$0.00		
Other(*notes in comments)	\$0.00		
Costs Offset Refiled UFR	\$1.00		
Estimated Date Reimbursement will be completed	06/30/2011		
Date Reimbursement completed			
5 % Excess SRR Grand Total Planed Agency Recoveries	-1.0		
<input type="button" value="Return to search"/>			

Figure 85: PDM Surplus Revenue page.

Appendix A: PDM Security Matrix

Provider Data Management (PDM)							
PDM Roles	Information	Qualifications	Financial Ratios	Correction Measures	Contract Detail	Surplus Revenue	Service Directory
Principle Purchasing Agency	View	Edit Update	View	Edit Update	View	Edit Update	NA
State Agency Observer	View	View	View	View	View	View	NA
POS Program Operations	Edit Update	Edit Update	View	Edit Update	View	Edit Update	NA
DDS Program Operations	NA	NA	Na	NA	NA	NA	Add Edit Update
DDS Operations Observer	NA	NA	NA	NA	NA	NA	View
PDM Contracted Providers Operations	Edit Update	View	View	View	View	View	View
PDM Provider Observer	View	View	View	View	View	View	View

This page is intentionally left blank

Appendix B: JAWS COMMANDS

READING TEXT

Command	Description
	Say Prior Character
	Say Next Character
Num Pad 5	Say Character
Num Pad 5 twice quickly	Say Character Phonetically
Insert +	Say Prior Word
Insert +	Say Next Word
Insert + Num Pad 5	Say Word
Insert + Num Pad 5 twice quickly	Spell Word
	Say Prior Line
	Say Next Line
Insert +	Say Current Line
Insert + twice quickly	Spell Current Line
Alt +	Say Prior Sentence
Alt +	Say Next Sentence
Alt + Num Pad 5	Say Current Sentence
Insert + Home	Say to Cursor
Insert + Page Up	Say from Cursor
Insert + Home twice quickly	Spell to Cursor
Insert + Page Up twice quickly	Spell from Cursor
Insert +	Say All
	Fast Forward during a Say All
	Rewind during a Say All
Insert + 5	Say Color
Num Pad 5 three times quickly	Say ASCII or Hexadecimal Value
Insert + F, twice quickly	Say Font
Ctrl + Insert +	Start Skim Reading
Ctrl + Insert + Shift +	Skim Reading dialog box
Insert + Windows Key +	Display Skim Reading Summary

Voice Rate

Command	Description
Ctrl + Alt + Page Down	Decrease Voice Rate

Command	Description
Ctrl + Alt + Page Up	Increase Voice Rate
Page Down	Decrease Voice Rate (when using SayAll)
Page Up	Increase Voice Rate (when using SayAll)

Headings and Lists

Command	Description
H	Headings Quick Key
1-6	Headings level 1-6
Insert + F6	List of Headings
L	List Quick Key
I	List Item Quick Key

Tables

Moving within Tables

Command	Description
T	Table Quick Key
Ctrl + Alt + →	Cell to Right
Ctrl + Alt + ←	Cell to Left
Ctrl + Alt + ↓	Cell Below
Ctrl + Alt + ↑	Cell Above
Ctrl + Alt + Home	First Cell
Ctrl + Alt + END	Last Cell
Ctrl + Alt + Shift + ↑	First Cell in Column
Ctrl + Alt + Shift + ↓	Last Cell in Column
Ctrl + Alt + Shift + ←	First Cell in Row
Ctrl + Alt + Shift + →	Last Cell in Row

Table Reading

Command	Description
Ctrl + Alt + Num Pad 5	Say Current Cell
Insert + Shift + ↑	Read Current Row
Insert + Shift + Home	Read from Start of Row
Insert + Shift + Page Up	Read to End of Row
Insert + Shift + Num Pad 5	Read Current Column
Insert + Shift + End	Read from Top of Column
Insert + Shift + Page Down	Read to Bottom of Column

Forms

Command	Description
F	Form Quick Key
B	Button Quick Key
R	Radio Button
Enter (in a form element)	Enter Forms Mode
Tab	Navigate to Next Form Control
Shift + Tab	Navigate to Previous Form Control
Spacebar	Select and Deselect Checkboxes
Alt + ↓	Open Combo Box/Jump Menu
Ctrl + Shift or Ctrl + Spacebar	Select Multiple List Items
Ctrl + \	Unselect All But Current
↑ / ↓	Select Radio Button
↑ / ↓ or the First letter	Select Element in Combo Box
Enter (in forms mode)	Submit Form
+ key	Exit Forms Mode
Insert + F5	List of Form Elements

Links

Command	Description
Tab	Jump from link/Form element next one
Shift + Tab	Jump from link/Form element next previous one
Ins + F7	Bring up a list of links within the page
U	Unvisited Link Quick Key
V	Visited Link Quick Key

Frames

Command	Description
Ctrl + Tab	Move from one frame to the next frame within the page.
Ctrl + Shift + Tab	Move from one frame to the previous frame within the page.
Ins + F9	Bring up a list of frames that are present within the page

Other Commands

Command	Description
Ctrl + F	Search for a word or a phrase
Ins + Esc	Refresh Screen, i.e. repaint all the currently displayed items on the screen

Command	Description
Ins + F5	Reformat documents, i.e. reformat multiple column pages to be more readable with speech
Insert + F1	Help with current element
Shift + Tab and press ↓	To read error message for “New” Search page
Shift + Tab and press ↓ and again press ↓	To read error message for “Manage” Search page

JAWS commands to open the document:

- ‘Alt’ button will display shortcut keys.
- Use ‘Alt + O’ to open the document.
- ‘.doc’ or Word documents by default open in ‘Non-editable’ mode.
- ‘Alt +S’ will enable the document to ‘Save’, displays message ‘Enable Saving’.
 - Clicking on ‘Enable Saving’ will open the document in edit mode.
 - Clicking on ‘Cancel’, will let the user remain on the same page in non-editable mode.

Service Directory:

To read and select multi select combo box:

- Keyboard users can press the Internet Explorer keystroke **SHIFT+F8** to turn on extended selection mode. While this mode is on, move up or down the list of choices and press **SPACEBAR** to select as many items as desired. To unselect a previously selected item, press **SPACEBAR** again on the item.

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