

STAAND Technical User Guide for Provider



Version 2.7 Enhancements
April 2026





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General Navigation



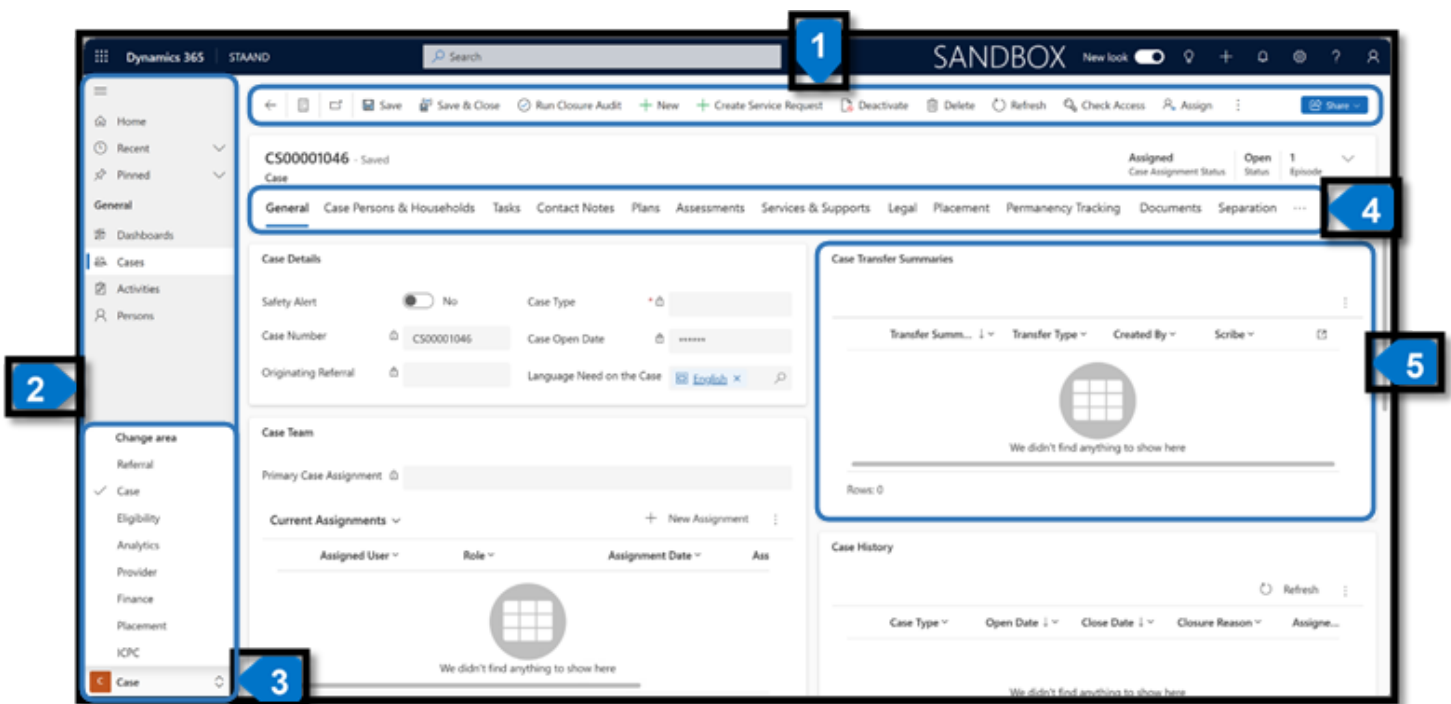
Key Navigational Features

The key elements of any STAAND page include the following:

1. **Action Toolbar:** is always visible, but the options change based on the current page or the save status of the record. Selecting Save can alter the available options.
2. **Site Map:** is located on the left side of the page and helps navigate the Work area.
3. **Site Map Work Area Selector:** is a dropdown menu at the bottom of the Site Map that displays different work areas in STAAND.

The key elements of a record (such as Case or Provider records) will include:

4. **Tabs:** shows different groups of information related to that record.
5. **Subgrid:** is a section of information on the page. It can be formatted as a table, or contain fields that require manual input.



The key elements of a record (such as Case or Provider records) will include:

- 6. Tabs:** shows different groups of information related to that record.
- 7. Subgrid:** is a section of information on the page. It can be formatted as a table, or contain fields that require manual input.

The screenshot displays a user interface for a provider record. At the top, the user's name 'Joe Shmoe' is shown with a 'Saved' status and a dropdown menu for 'Provider main form'. Below this is a navigation bar with tabs: 'General', 'Assignments', 'Persons', 'Documents', 'Licenses', 'Contracts / Service Lines', 'Availability', 'Finance', 'Admin', and 'Related'. The 'General' tab is selected. The main content area is divided into three sections: 'Provider Information', 'Availability', and 'Contact Information'. The 'Provider Information' section contains 'Provider Name' (Joe Shmoe) and 'Provider ID' (P-0100000394). The 'Availability' section contains 'Available' (No) and 'Provider Status'. The 'Contact Information' section contains 'Primary Contact' and 'Secondary Contact', both with search icons.

Provider Records

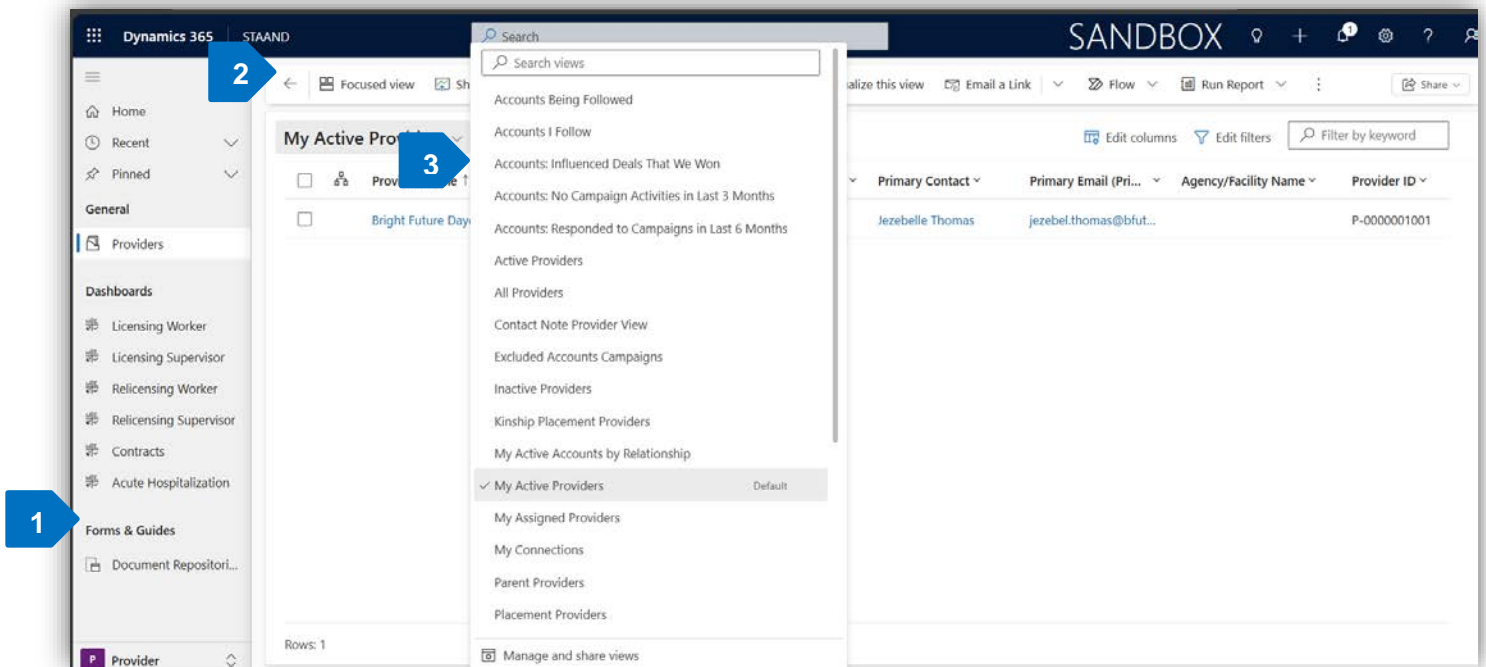


Conducting a Provider Person Search



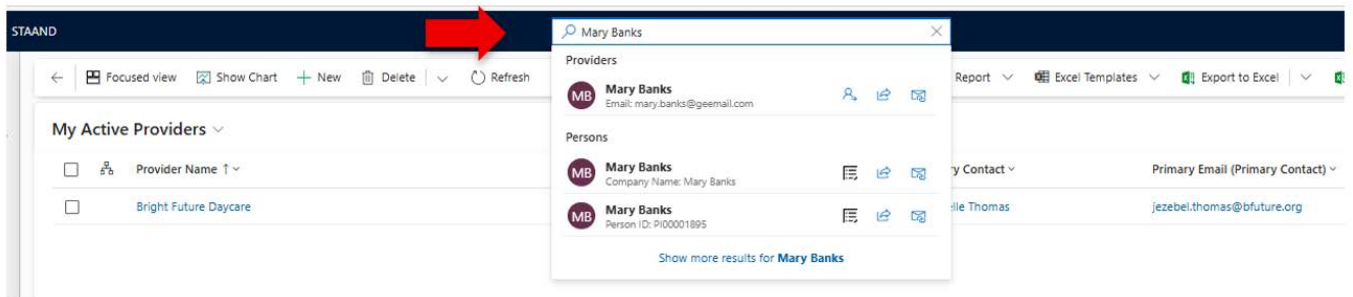
Provider Dashboard

1. Ensure the Site Work Selector is on Provider module.
2. The default dashboard is the My Active Providers dashboard. The default dashboard can be changed by selecting the Set as default view option at the bottom of the list.
3. Click the dashboard dropdown carat and select the needed dashboard, i.e., All Providers, Active Providers, Inactive Providers, etc.



Global Search

1. Enter the name of the provider in the Global search bar. The Provider record and Person records are revealed. Select the appropriate record as needed.



Wildcard Search

At the All Providers dashboard, a search can be conducted in the search bar located on the right-side of the screen.

1. Ensure the Work Selector Area is **Provider**.
2. Enter the provider's name in the search field then **Enter**.

The screenshot shows the Dynamics 365 interface for the 'All Providers' dashboard. A search bar on the right side of the table is highlighted with a red box and a circled '2', containing the text 'Mary Bank'. A tooltip is visible over the search bar, indicating the filter is applied to the 'Provider Name' column. On the left-hand navigation pane, the 'Providers' section is highlighted with a red box and a circled '1'.

Provider Name	Main Phone	Address 1: City	Primary Contact	Primary Email (Primary Contact)	Status	Agency/Facility Name	Provider ID
CPSA - Placement Provider			CPSA Placement Provider		Active		
Mary Banks			Mary Banks	marybanks@gmail.com	Active	CPSA - Placement Provider	PR-NC-01014
Classy Clothing Store			Classy Clothing	classyclothing@gmail.com	Active		
Working Together Group Home			Working Together Group Home W...	working@geemail.com	Active	CPSA - Placement Provider	PR-NC-01019
Tasha Jackson			Tasha Jackson	tashajackson@gmail.com	Active	CPSA - Placement Provider	PR-NC-01016
Newton's Tutoring Services			Greg Newton	greg.newton@gmail.com	Active		PR-NC-01020
Domestic Violence Services					Active		PR-NC-01021
Private Partners Placement Agency			Hill Harp	hillharp@gmail.com	Active		PR-C-01022
Johnny Goode			Johnny Goode	jgoode@gmail.com	Active	Private Partners Placement Agency	PR-C-01023
Sarah Middleton			Sarah Middleton	sarahm@gmail.com	Active	Private Partners Placement Agency	PR-C-01024
Cece Williams			Cece Williams	cwilliams@gmail.com	Active	CPSA - Placement Provider	PR-NC-01025
Substance Abuse Services			Judy Richards	judyrichards@gmail.com	Active		PR-NC-01026
TestProvider_3612			Jiggs_6071 Maok153	jiggs_6071@gm.com	Active		P-0000001002
BVT_Testing_2352			Balakrishnan A	Balakrishnan.A.mst@goviction...	Active		P-0000001001
Automation Testing_2889			Balakrishnan A	Balakrishnan.A.mst@goviction...	Active		P-0000001000
Bright Future Daycare	Washington		Jezabelle Thomas	jezabelle.thomas@future.org	Active		P-0000001001

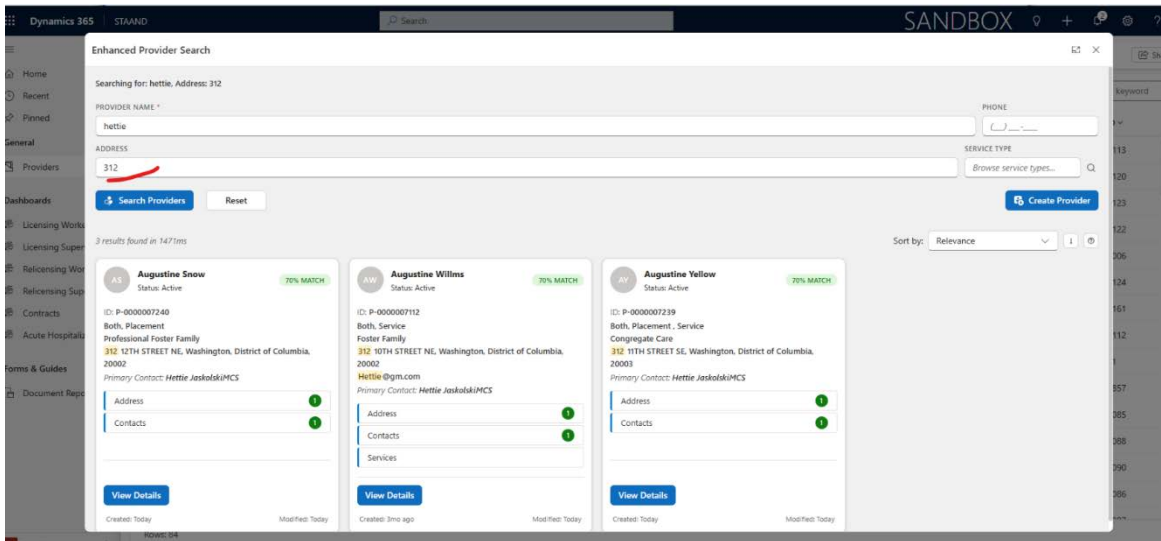
3. The provider's name will populate in the **All Providers** screen.

The screenshot shows the 'All Providers' dashboard after a search for 'Mary Banks'. The search bar on the right now contains 'mary ba'. The table displays a single result for 'Mary Banks', which is highlighted with a red box and a circled '3'.

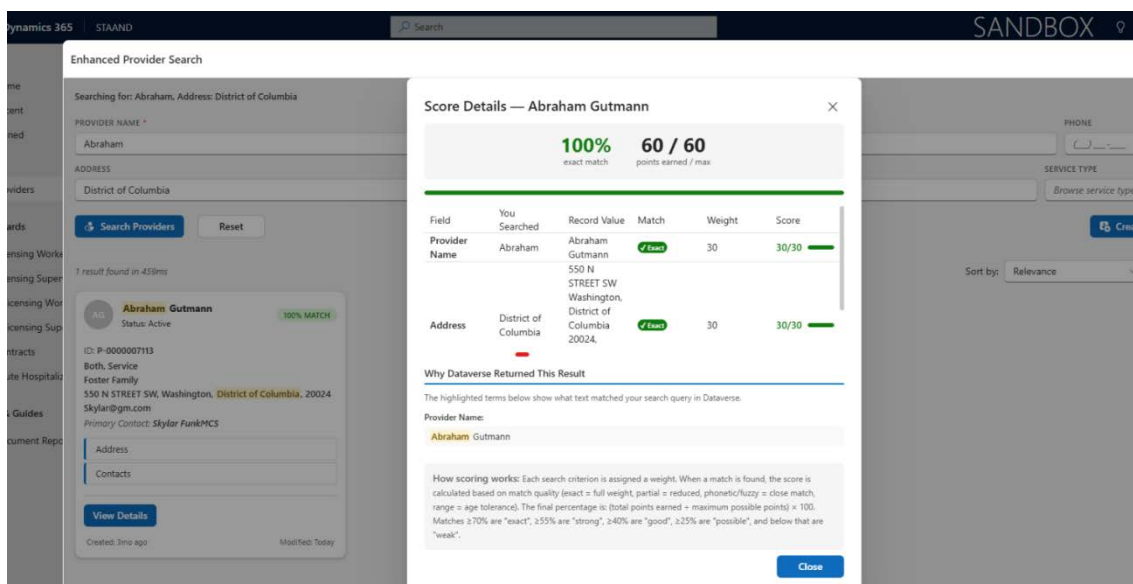
Provider Name	Main Phone	Address 1: City	Primary Contact	Primary Email (Primary Contact)	Status	Agency/Facility Name	Provider ID
Mary Banks			Mary Banks	marybanks@gmail.com	Active	CPSA - Placement Provider	PR-NC-01014

Enhanced Search – By Address

1. Select the Provider Entity
2. Click on Provider Search on the ribbon bar
3. Enter the Provider name or the Primary Contact name
4. Enter the full address - Match should be exact
5. Enter the Door number or street address - match should be partial
6. Enter the State
7. Enter the Country

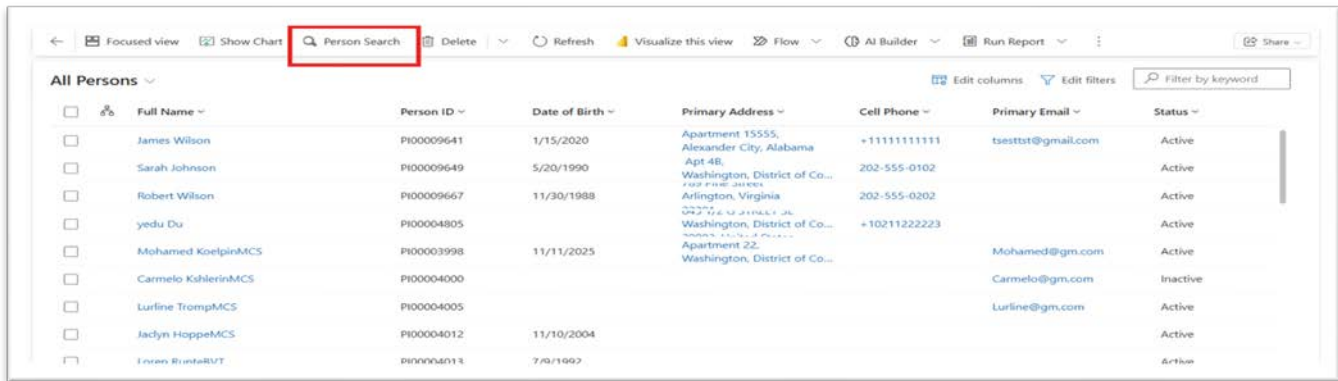


8. The Provider(s) which satisfies the search conditions will be reflected in the Provider Search results.

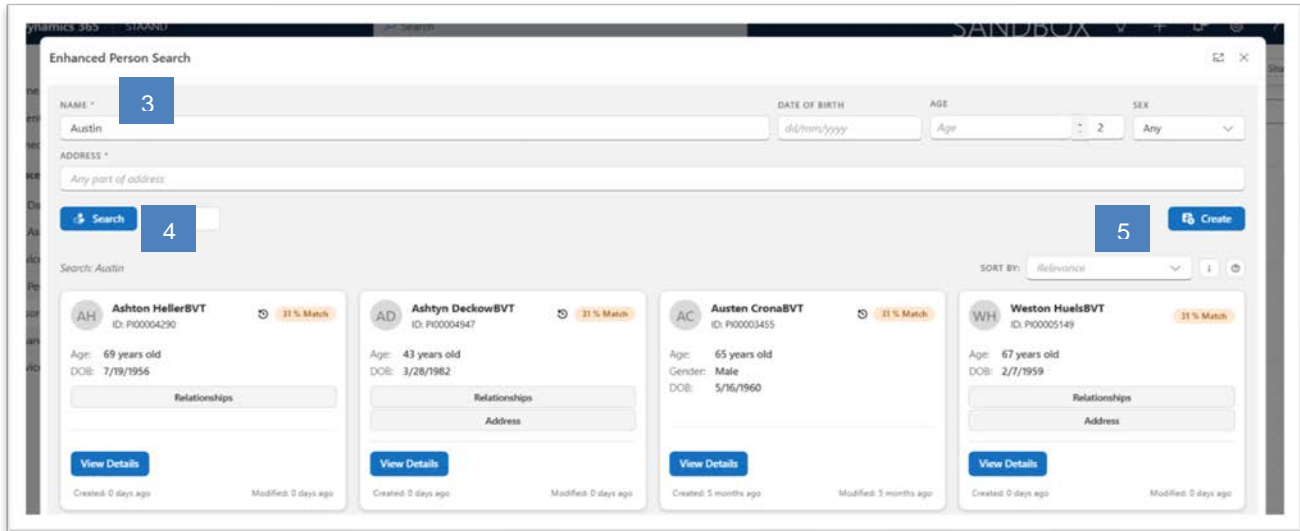


Person Search on Persons View

1. Select Referral Entity -> Persons Sub area
2. The Person Search button is available in the command bar



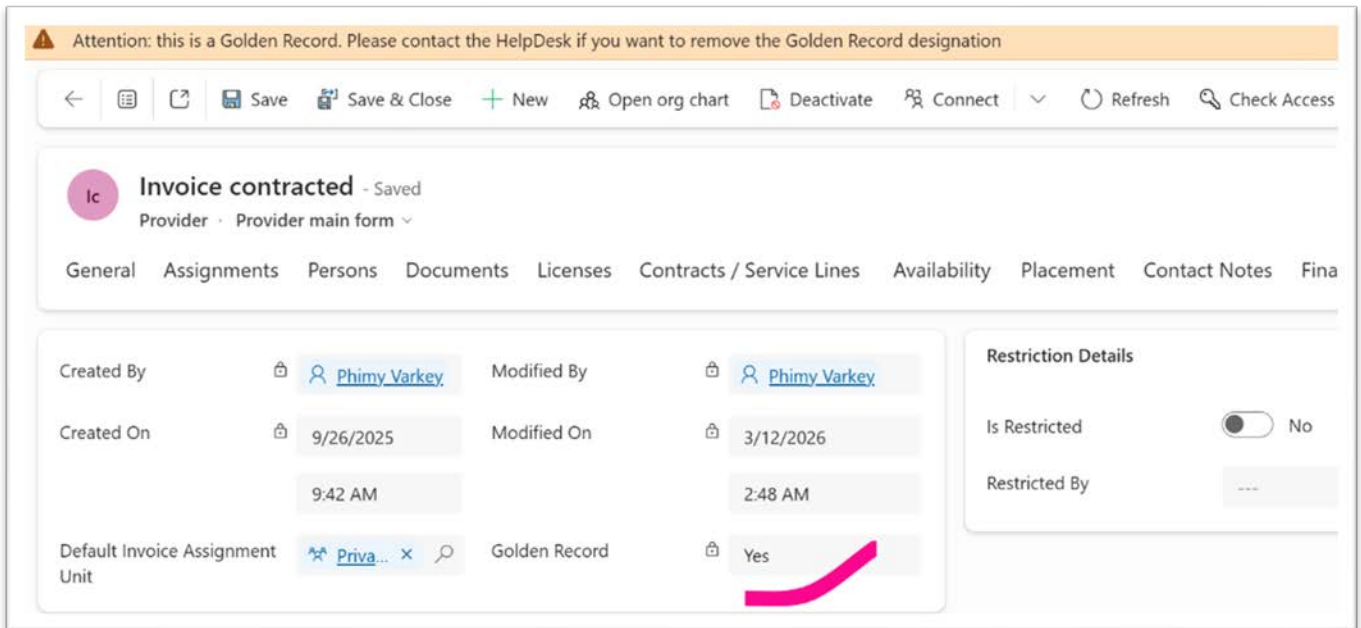
3. Enter the Name, DOB, Age, Address whichever required
4. Click on Search to see the results
5. Click on Create-to Create New Person



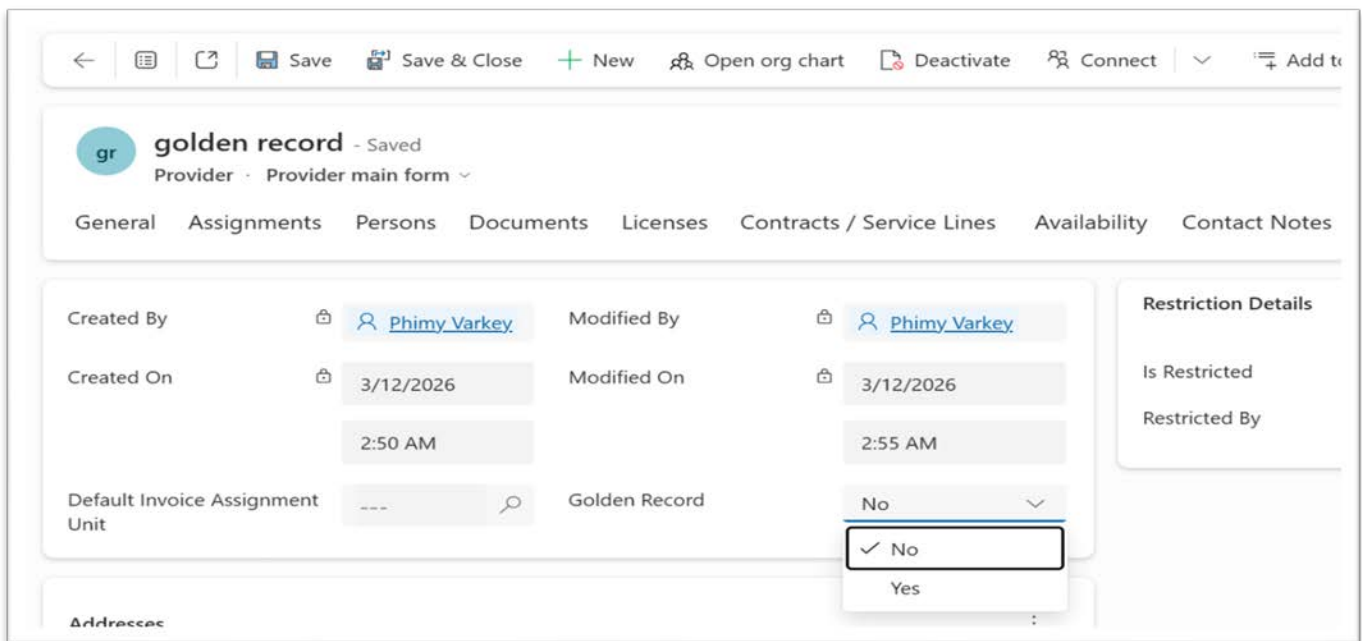
Golden Record

Golden Record is a verified master record, a trusted source of truth, and a record that should not be deleted or removed during de-duplication or merging for person and provider records.

A banner will show at the top of the screen to confirm the Golden Record.



Default value is No for all existing and new Provider records unless explicitly updated by a certain set of users (Admin permissions).





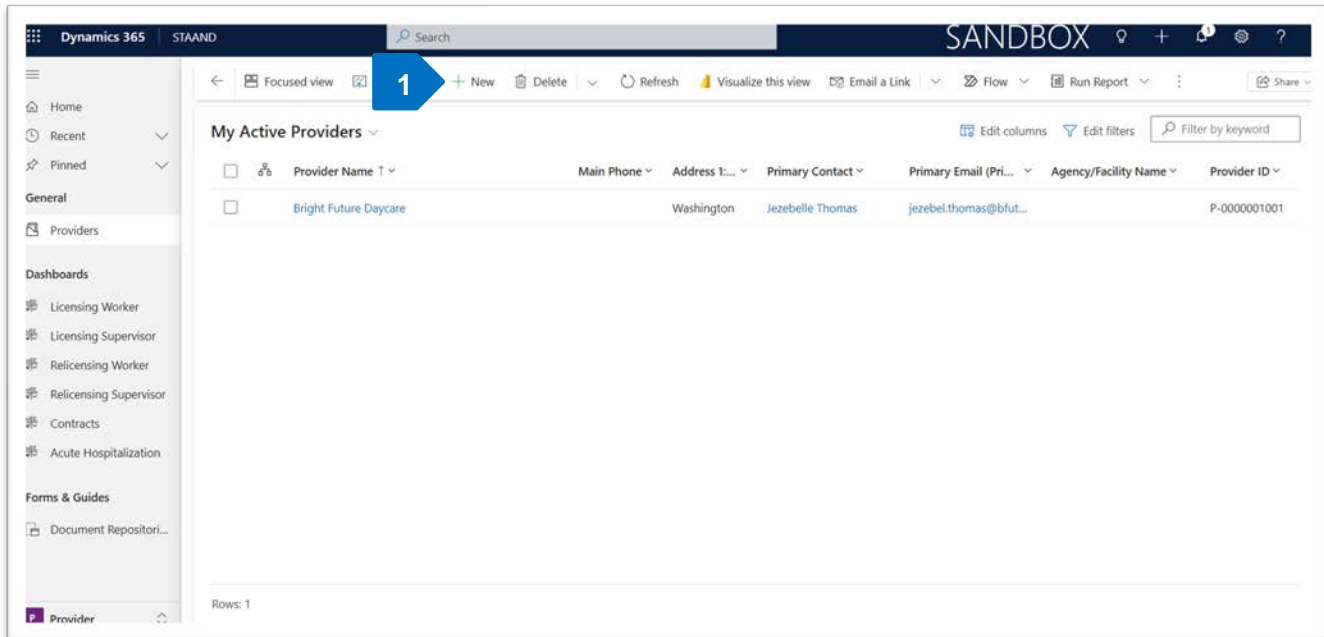
Note:

- When set to Yes, the Provider record is identified as a Golden Record.
- The record should not be deleted during merge or cleanup processes. Once labeled a Golden Record, the record cannot be inactivated by any user other than the Admin.



How To: Create a Service Provider

1. From the Provider work area, select + New from the Action Toolbar:



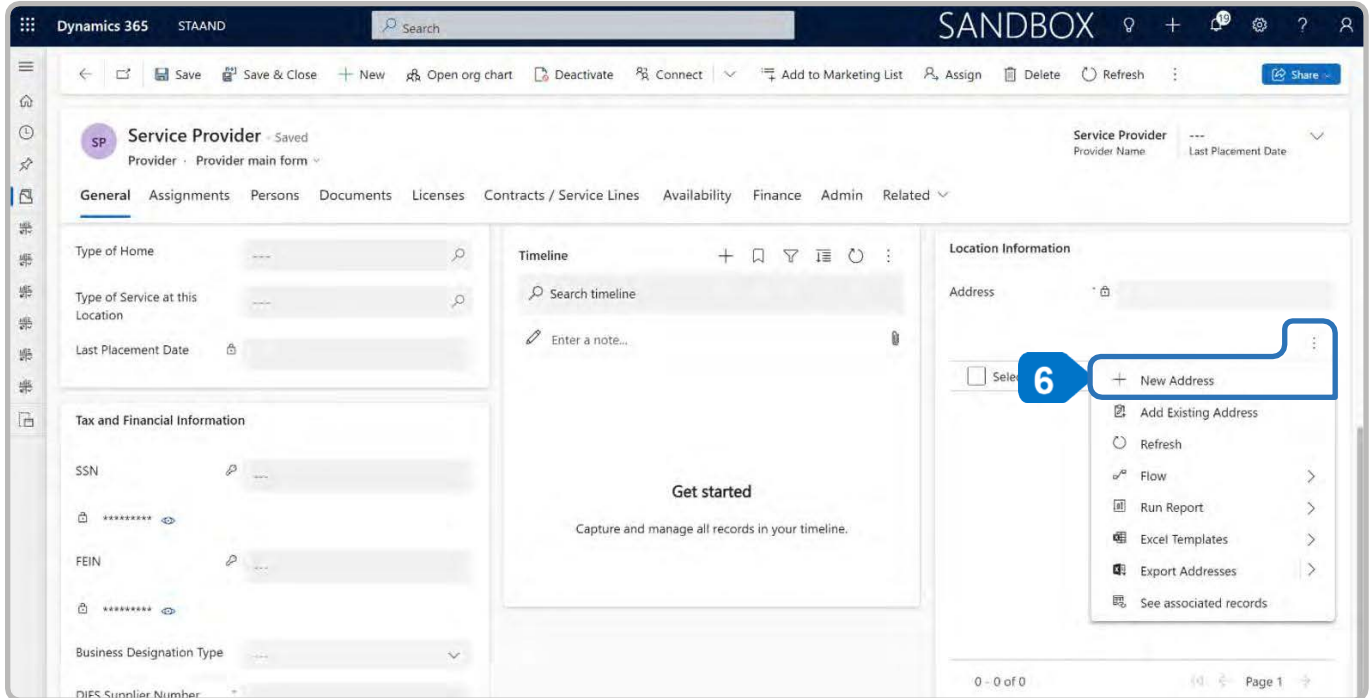
2. Complete all fields, including Provider Name, Type, and Class.
3. Select Service Provider for the Provider Category field.
4. Enter a Primary Contact within the Contact information sub-grid (secondary contact can be added as needed).
5. Select Save.

The screenshot shows the 'New Provider' form in Dynamics 365. The form is titled 'New Provider' and has a 'Provider main form' sub-grid. The form is divided into several sections: 'Provider Information', 'Availability', 'Contact Information', and 'Location Information'. The 'Provider Information' section contains fields for Provider Name, Provider ID, Provider Type (set to 'CFSA'), Provider Category (with callout 3), Provider Class, Is Agency (set to 'No'), Agency/Facility Name, Is Facility (set to 'No'), Type of Home, Type of Service at this Location, and Last Placement Date. The 'Availability' section contains fields for Available (set to 'No'), Provider Status, Unavailability Reason, Total Provider Capacity, Children in Placement, and Current Availability. The 'Contact Information' section contains fields for Primary Contact (with callout 4) and Secondary Contact. The 'Location Information' section contains fields for Address, Main Phone, Other Phone Number, Email, Extension, and Distance. The form is set to 'SANDBOX' mode. Callout 2 points to the 'Children in Placement' field, callout 3 points to the 'Provider Category' field, and callout 4 points to the 'Primary Contact' field.

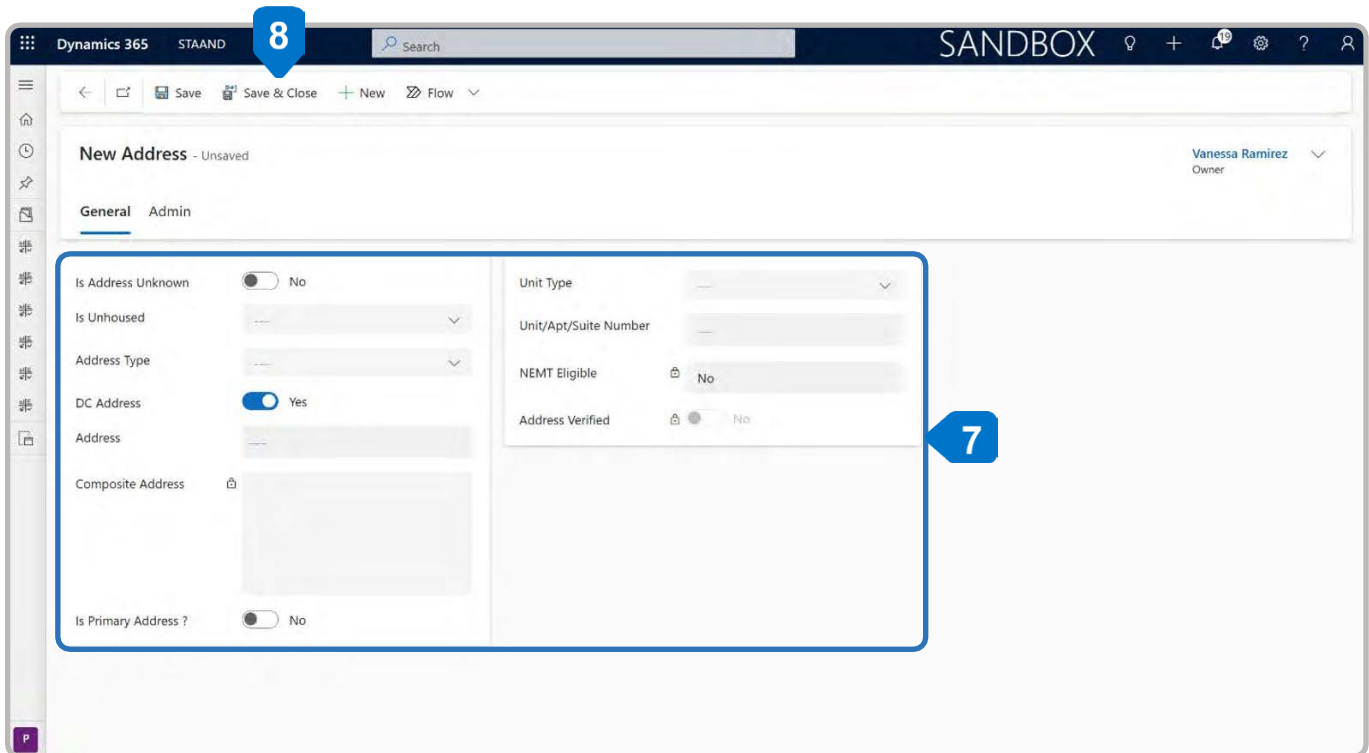
Note:

When selecting a Provider Category, a Provider can be classified as Contracted, Non-Contracted or both.

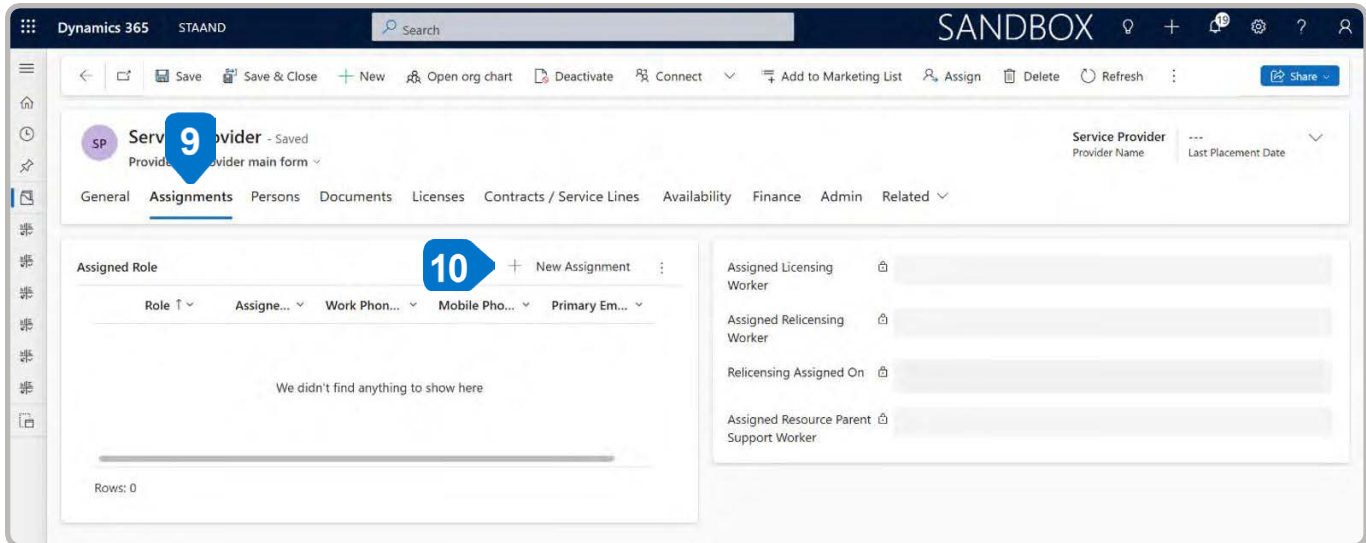
- From the Location Information sub-grid, select + New Address. If not visible, select the more commands icon to view more options:



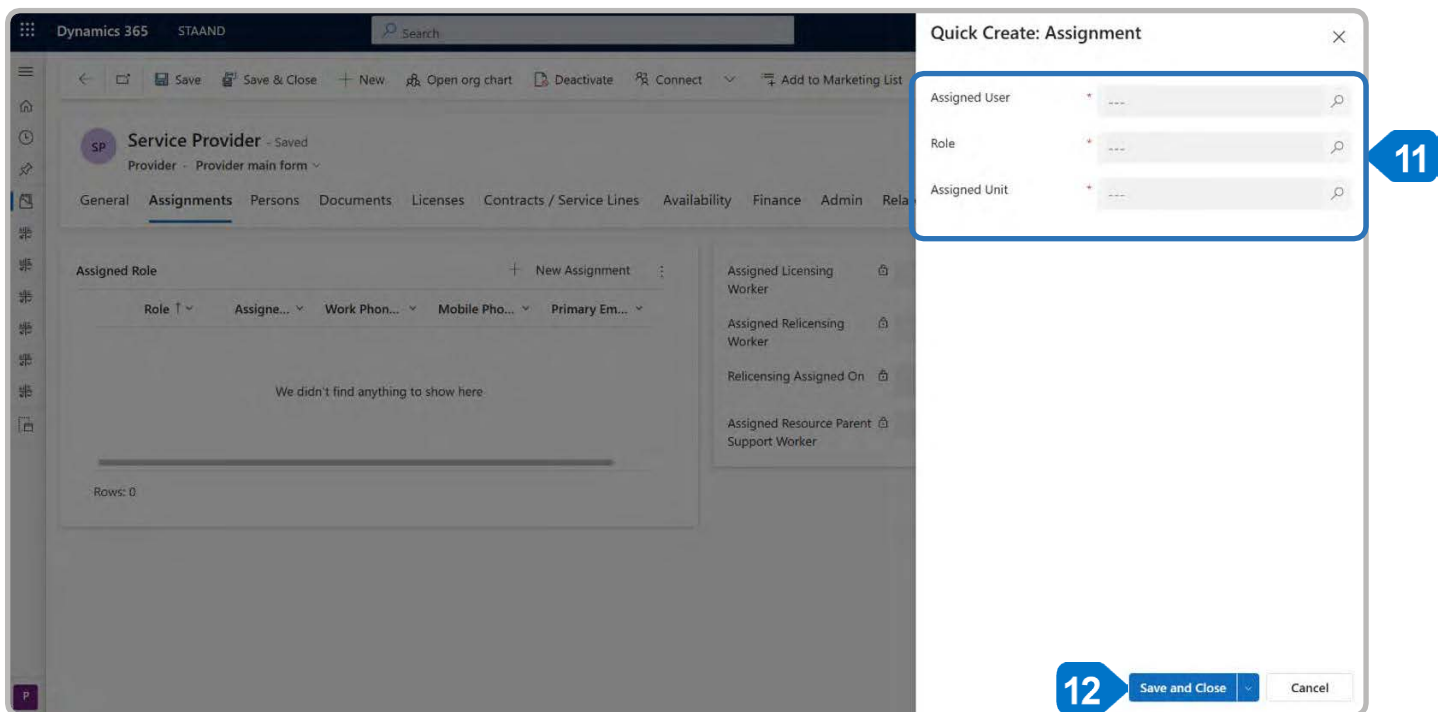
- Complete all fields.
- Select Save & Close.



9. To assign a Provider record to a STAAND user, select the Assignments tab.
10. Select + New Assignment to create a new assignment role.



11. Complete all fields within the Quick Create: Assignment window.
12. Select Save and Close.



Important Tip:

User can create multiple assignments by repeating steps 9-12.

13. To Create a new Provider Person, select the Persons tab.

14. Select + New Provider Person.

The screenshot displays the Dynamics 365 interface for a Service Provider record. The top navigation bar includes 'Dynamics 365', 'STAAND', a search bar, and 'SANDBOX'. The main header shows the record name 'Service Provider' and a 'Persons' tab selected. Below the header, there are tabs for 'General', 'Assignments', 'Persons', 'Documents', 'Licenses', 'Contracts / Service Lines', 'Availability', 'Finance', 'Admin', and 'Related'. The 'Active Provider People' section contains a table with columns: 'Person', 'Member Type', 'Date of Birth (Person)', 'Sex Assigned at Birth (Person)', 'Start Date', and 'End Date'. A '+ New Provider Person' button is highlighted with a blue callout '14'. Below the table, a message states 'We didn't find anything to show here' with 'Rows: 0'. The 'Relationships for Primary and Secondary Contacts' section shows 'Primary Contact' as 'Vanessa Ramirez' and 'Secondary Contact' as an empty field. Below this, the 'Active Person Relationships' section has columns for 'Person From', 'Is', 'Person To', and 'Relations...'. A blue callout '13' points to the 'Persons' tab in the header.

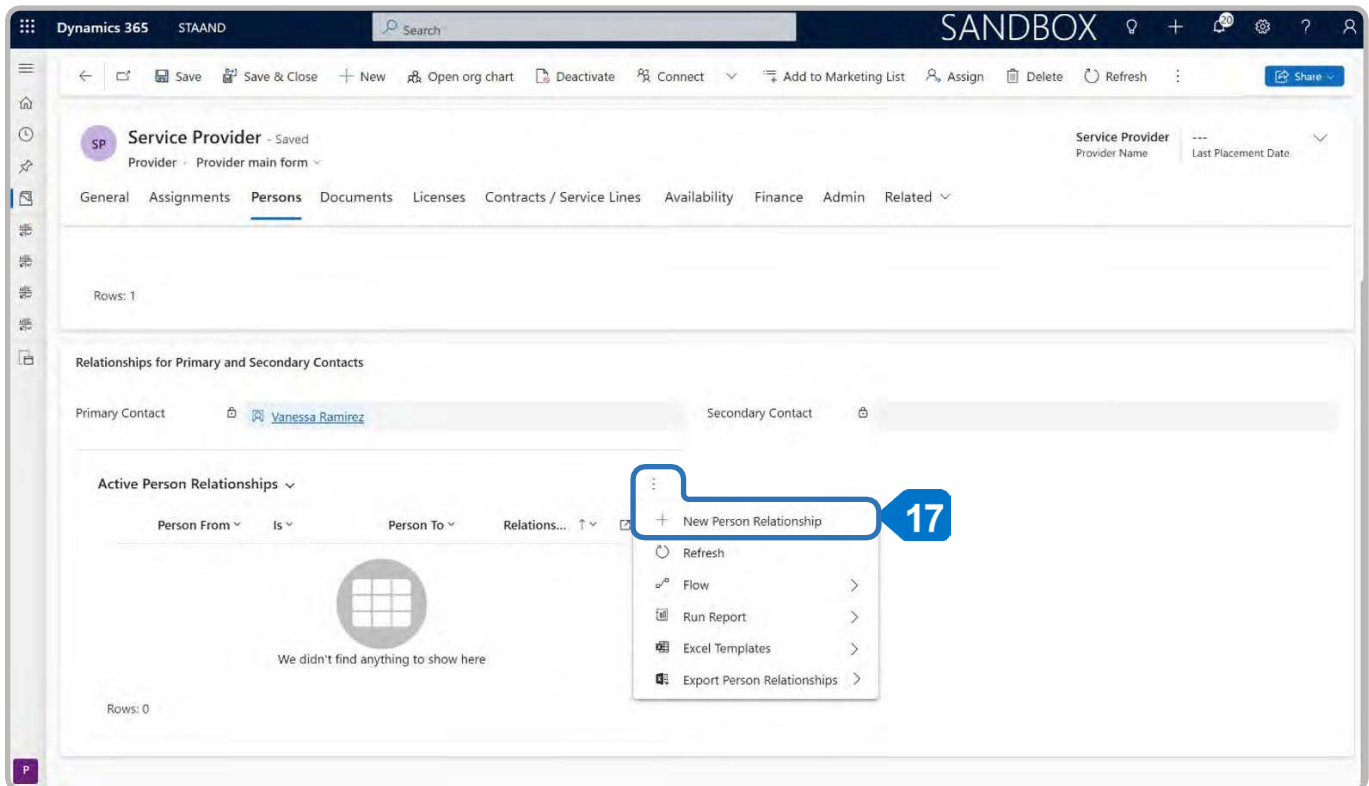
15. Complete all fields within the Quick Create: Provider Person window.

16. Select Save and Close.

The screenshot shows the Dynamics 365 interface for creating a Provider Person. The main window displays the 'Service Provider' record with tabs for General, Assignments, Persons, Documents, Licenses, Contracts / Service Lines, Availability, Finance, Admin, and Relationships. The 'Persons' tab is active, showing a table for 'Active Provider People' with columns for Person, Member Type, Date of Birth (Person), and Sex Assigned at Birth (Person). Below this is a section for 'Relationships for Primary and Secondary Contacts' with a primary contact 'Vanessa Ramirez'. The 'Quick Create: Provider Person' window is overlaid on the right, with fields for Provider (Service Provider), Person (---), Member Type (Adult Household Member), Start Date (---), and End Date (---). A blue callout box with the number 15 points to the Member Type dropdown. At the bottom of the window, there is a 'Save and Close' button with a blue callout box containing the number 16, and a 'Cancel' button.

Note: When adding Persons, please ensure that a Person Search is completed to ensure data quality and prevent creation of duplicate records in STAAND.

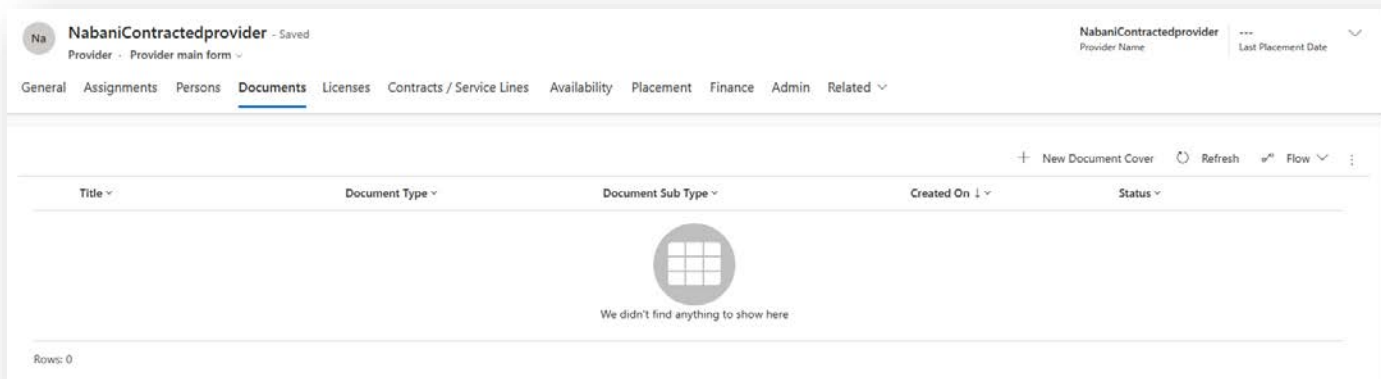
17. To create a New Person Relationship, from the Active Persons Relationships sub-grid, select + New Person Relationship. If not visible, select the more commands option to view more options.



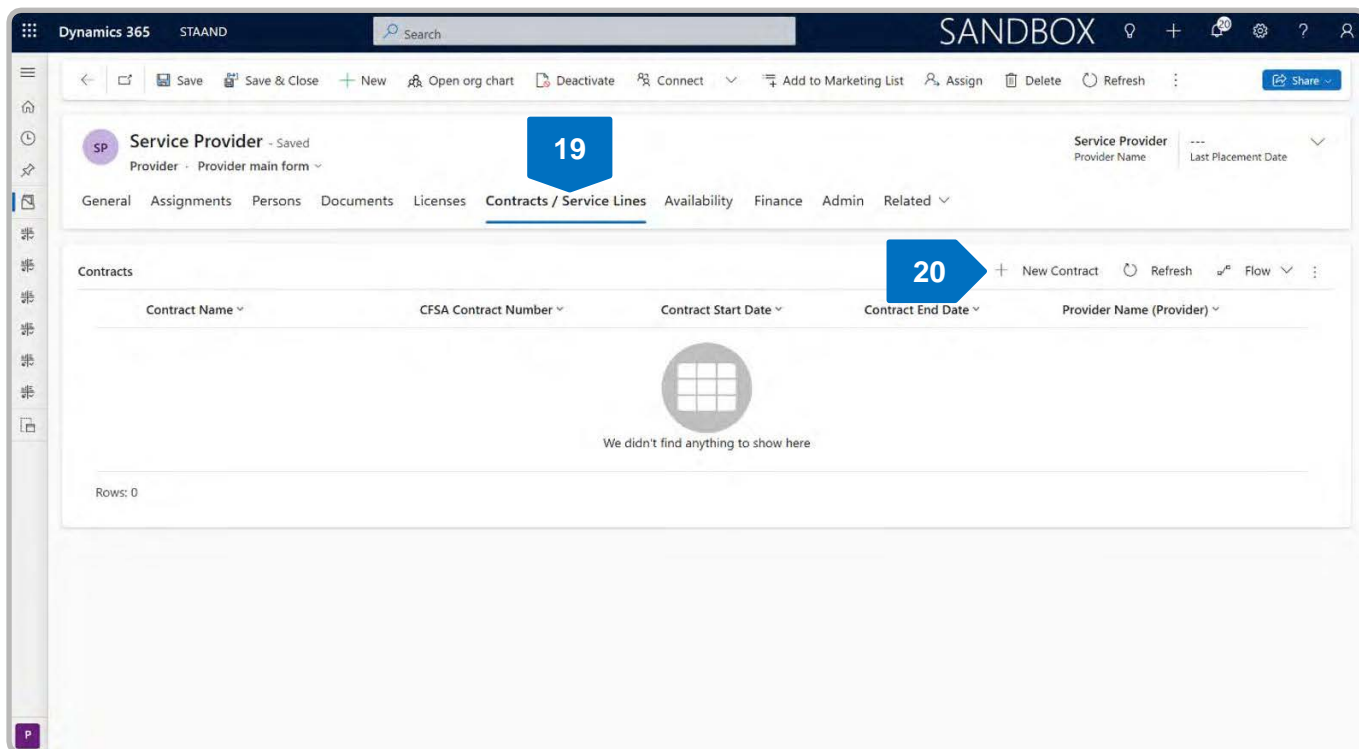
Important Tip:

Adding a relationship for Primary and Secondary Contacts is not required and is at the discretion of User.

18. Provider licenses can be added on the Licenses TAB; however, most service providers will NOT require a license record to be created in STAAND. If a provider, such as a daycare center provisions a copy of their license to the CFSA, then it can be uploaded to the Documents tab on the Provider record.



19. To add a Contract or a Service Line, select the Contracts/Service Lines tab.
20. For new Contract: Select + New Contract.



21. Complete all fields including Contract Name, CFSA Contract Number, Contract Amount, Contract Date, and Contract Start and End Date.

22. Select Save.

The screenshot displays the Dynamics 365 user interface for creating a new contract. The top navigation bar includes the Dynamics 365 logo, the user name 'STAAN', and the environment name 'SANDBOX'. The main header shows 'New Contract' and 'Contract - Provider Contract'. The 'General' tab is selected. The form fields are organized into two columns. The left column includes 'Provider' (with a link to 'Service Provider'), 'Contract', 'CFSA Contract Number', 'Industry ID', 'Payment Type' (set to 'Regular Paid'), 'Aggregate Contract Amount', 'Calculated Contract Amount', 'Contract Amount', and 'Comments'. The right column includes 'Contract Date', 'Contract Start Date', 'Contract End Date', and 'Status' (set to 'Active'). A blue callout box with the number '21' is located at the top left of the form area, and another blue callout box with the number '22' is located at the top right. The bottom section of the form is titled 'Contract / Service Lines'.

23. To add a new Contract Line or Service Line, from the Contract/Services Lines sub-grid, select + New Contract/Services.

Dynamics 365 STAAND SANDBOX

Warning: The total contract amount does not match the calculated amount. Please review and correct the contract details.

← Save Save & Close + New Deactivate Delete Refresh Check Access Change Owner Flow Word Templates Share

Service Provider Test Saved

Contract - Provider Contract

General Admin Related

Aggregate Contract Amount

Calculated Contract Amount

Contract Amount * 100,000.00

Comments

Contract / Service Lines

23 + New Contract / Servic... Refresh Flow

Name	Service Type	Start Date	End Date	Amount	Facility Rate / R ...	Contracted Capa...	Status	Created ...

24. Complete all fields including Service Type, Start Date, End Date and Amount.

25. Select Save.

Dynamics 365 STAAND 25 SEARCH SANDBOX

New Contract / Service Line Draft Status

General Admin

Contract: Service Provider Test Start Date: *

Provider: Service Provider End Date: *

Service Type: * PSA Client

Service Pay Type: Regular Paid Amount: *

Contract Line Payment Type: Available Balance Amount

Contract Type: Paid Invoices Amount

Facility Rate / R & B Amount: Remaining Balance

Case Management Rate: Comments

Contracted Capacity:

Medicaid Eligible: No

Court Order: No

26. Select Submit from the Action Toolbar to submit for approval.

Dynamics 365 STAAND 26 SEARCH SANDBOX

Transportation for clinical services-2025-05-14-2026-05-14 - Saved Draft Status

Contract / Service Line

General Admin Related

Contract: Service Provider Test Start Date: * 5/14/2025

Provider: Service Provider End Date: * 5/14/2026

Service Type: * Transportation for clinical services x PSA Client

Service Pay Type: Regular Paid Amount: * 30,000.00

Contract Line Payment Type: Adhoc Available Balance Amount: 30,000.00

Contract Type: Paid Invoices Amount

Facility Rate / R & B Amount: Remaining Balance: 30,000.00

Case Management Rate: Comments

Contracted Capacity:

Medicaid Eligible: No

27. The contract line is submitted to a Supervisor or Program Manager for approval.

This message has not yet been submitted for delivery. For more information, see help.

← Reply Reply all → Forward Save Save & Close Refresh Share

New Contract Line Approval Request Normal Priority Pending Send Status Reason CFSA STAANDR2Backend Owner

CRM:0710157 - Saved
Email · Email

Email Admin Related

27

From: CFSA STAAND NoReply
To: Phimy Varkey
Cc:
Bcc:
Subject: New Contract Line Approval Request CRM:0...

Attachment: Attachments (0) No attachments included.

Hello Phimy,

A new contract line requires your approval. Please review and take action. [Link to approval page](#)
Contract Number: 32423423
Contract Line: Collaborative Case Management (Teaming with Collaborative Before CFSA)

28. The approver will receive a system generated notification and an email notification.

Dynamics 365 STAAND SANDBOX

At Risk Consultations - Saved
Contract / Service Line
General Admin Activities Related

All Activities

Due: All Activity Type: All

Subject	Regarding	Activity Type	Activity Status	Owner	Priority	Start Date	Due
---------	-----------	---------------	-----------------	-------	----------	------------	-----

Notifications

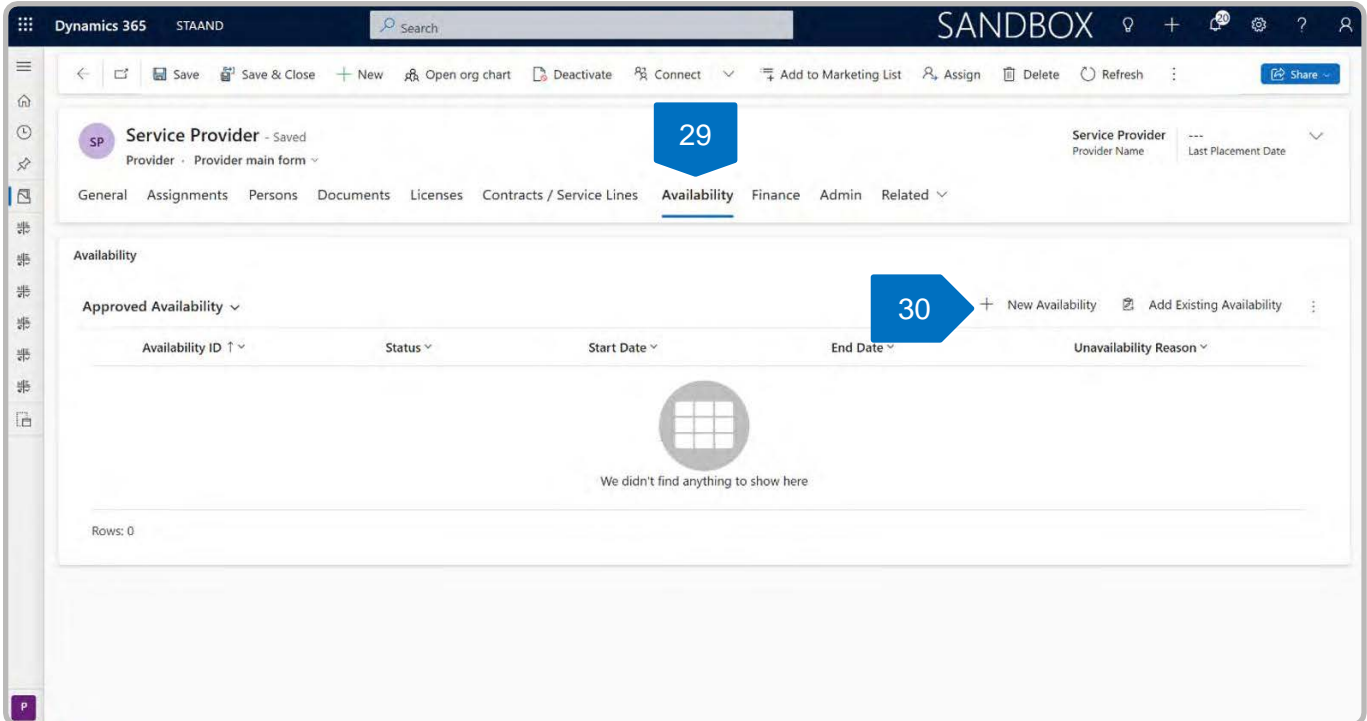
Dismiss all

- 2 minutes ago: **New Contract Line Approval Request**
A contract line requires your approval. Please review and take action.
[View Approval](#)
- 8 hours ago: **Intake Notification**
New intake received on Open Investigation #F00001155
#F00003106
- 7 days ago: **Placement Request Approved**
Assigned Supervisor: Harshita Kodali
Placement Request Status: Supervisor Approved
Child Name: Karthick AK
Age: 13
Sex Assigned At Birth: Male
[Tap here to review for approval](#)
- 2 days ago: **Placement Search Results Available**
Placement search completed for placement request #9-20-1321. The results are now available for review.
[Tap here for more details](#)

28

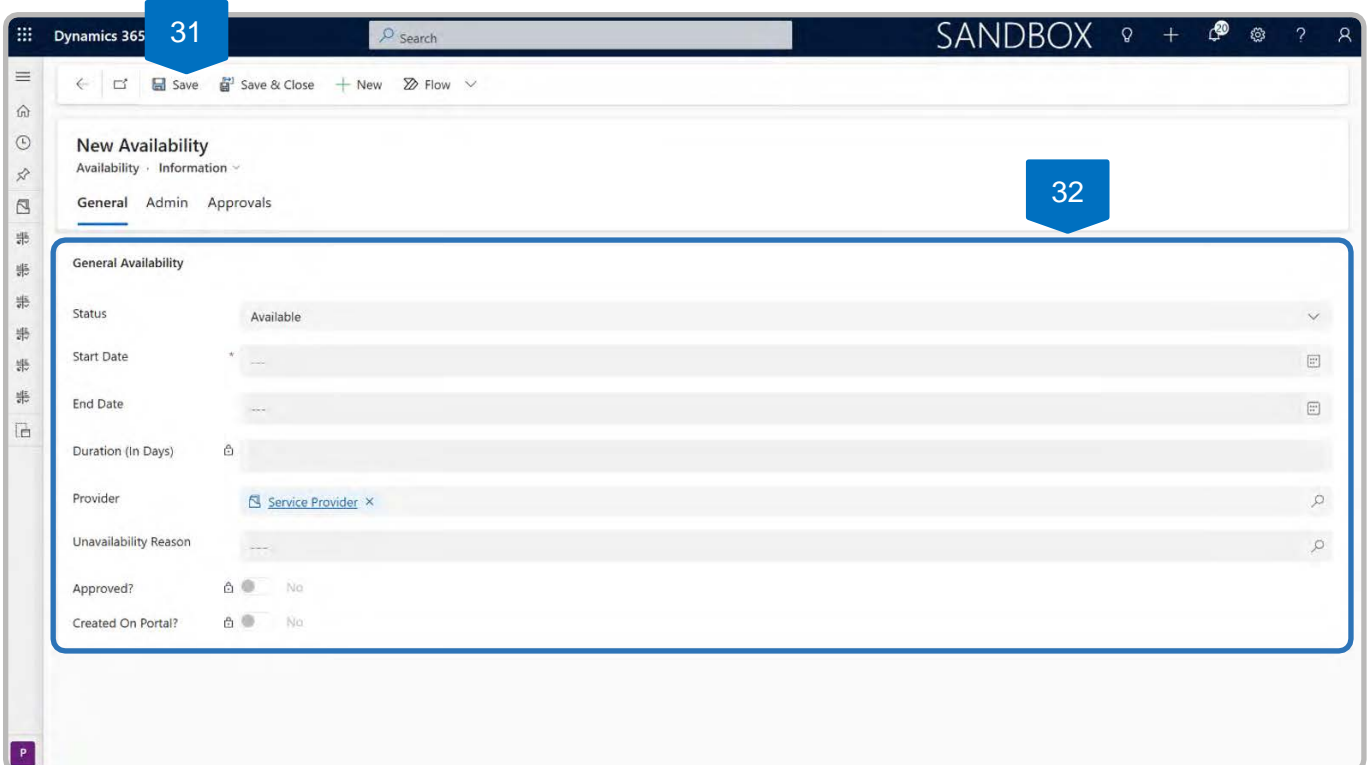
29. To Add New Availability, select the Availability tab.

30. Select + New Availability.



31. Complete all fields including Status and Start Date.

32. Select Save.



Note:

If an End Date is selected, the User will then need to select an Unavailability Reason from the dropdown menu.

33. Select Submit from the Action Toolbar to send for approval.

The screenshot displays the Dynamics 365 interface for an Availability record (AV-001399). The record is saved and currently in the 'Information' view. The 'General Availability' section shows the following fields:

- Status: Available
- Start Date: 5/15/2025
- End Date: ---
- Duration (In Days): ---
- Provider: Service Provider
- Unavailability Reason: ---
- Approved?: No
- Created On Portal?: No

The action toolbar at the top of the record view includes buttons for Save, Submit, Save & Close, New, Deactivate, Delete, Refresh, Check Access, Change Owner, Flow, and Share. The 'Submit' button is highlighted with a blue callout box containing the number 33.

34. Complete all fields within the Quick Create: Approval window.

35. Select Save and Close. Once approved, availability will become active.

The screenshot shows the Dynamics 365 interface with a 'Quick Create: Approval' dialog box open. The dialog contains the following fields:

- Requester: Vanessa Ramirez
- Approver: (empty)
- Requester Comments: (empty)
- To Be Approved: AV-001399

A blue arrow labeled '34' points to the Approver field. At the bottom of the dialog, a blue arrow labeled '35' points to the 'Save and Close' button.

36. Once the Provider availability is approved, it will populate in the Approvals subgrid.

The screenshot shows the Dynamics 365 interface with the 'Approvals' subgrid populated. The subgrid has the following columns:

- Requestor
- Requested Date
- Approver
- Decision
- Decision Date

A single row is visible with the following data:

Requestor	Requested Date	Approver	Decision	Decision Date
Vanessa Ramirez	5/14/2025 4:03 PM	Vanessa Ramirez	Approved	5/14/2025 9:04 PM

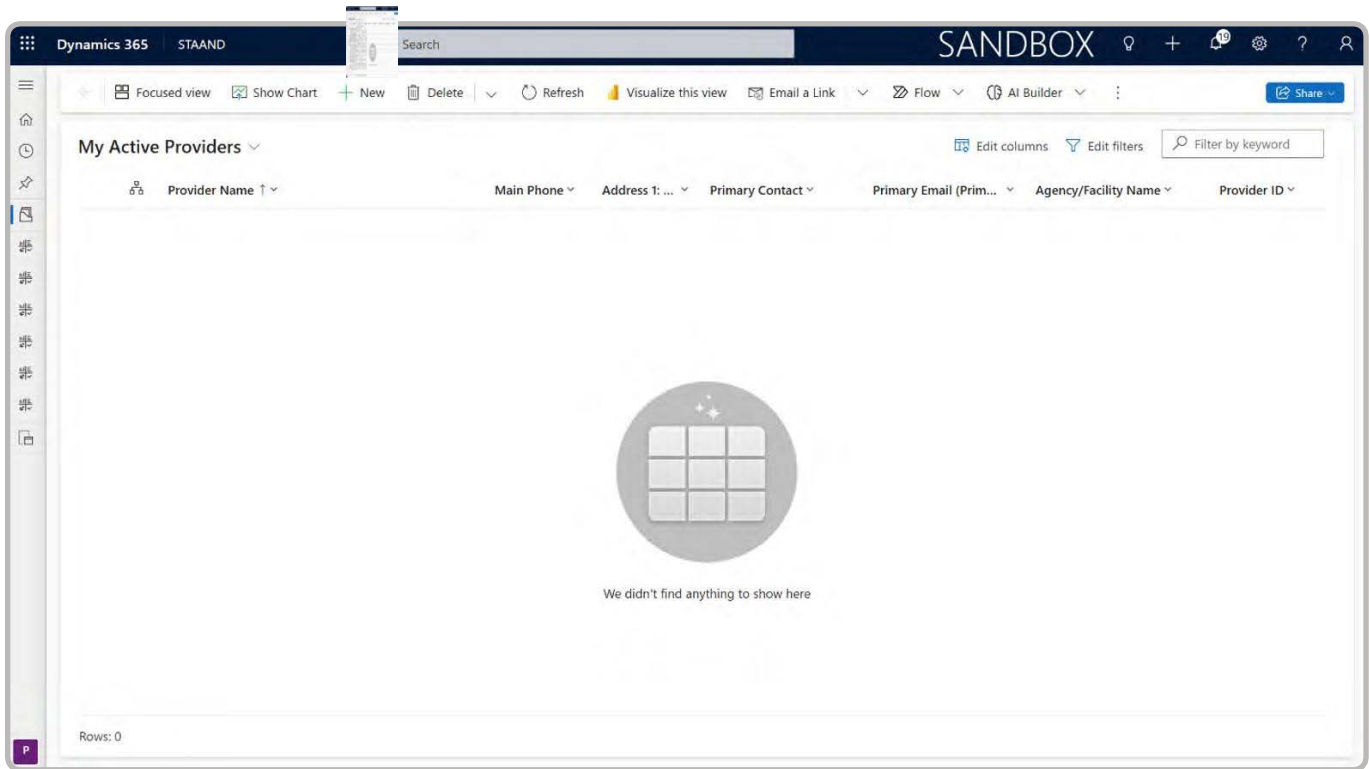
A blue arrow labeled '36' points to this row.

37. Any Invoices related to the Provider will populate in the Finance tab.

The screenshot shows the Microsoft Dynamics 365 interface for a 'Parent Agency Provider' record. The top navigation bar includes 'Dynamics 365', 'STAAND', a search bar, and 'SANDBOX'. The record name 'Parent Agency Provider' is displayed with a '37' badge. The 'Finance' tab is selected, showing two empty tables: 'Episodic Service Logs' and 'Invoices'. Both tables have headers with various columns and a message: 'We didn't find anything to show here'. The 'Episodic Service Logs' table has columns: Entry ID, Assigned Agency, Provider, Child, Start Date, End Date, Contract (Contract/...), Contract/Service ..., Service Type (C...), and Created On. The 'Invoices' table has columns: Invoice Nu..., Agency/Prov..., Service Type, Invoice Amo..., Invoice Approved Am..., Invoice Paid Amo..., Invoice Submitte..., Invoice Sta..., and Approval St....

How To: Create a Placement Provider

1. From the Provider work area, select + New from the Action Toolbar:



2. Select Placement Provider for the Provider Category field.
3. Complete all fields including Provider Class, and Type of Home.
4. Enter a Primary Contact, within the Contact Information subgrid. If needed, add secondary contact (ex., for Licensee 2).
5. Select Save.

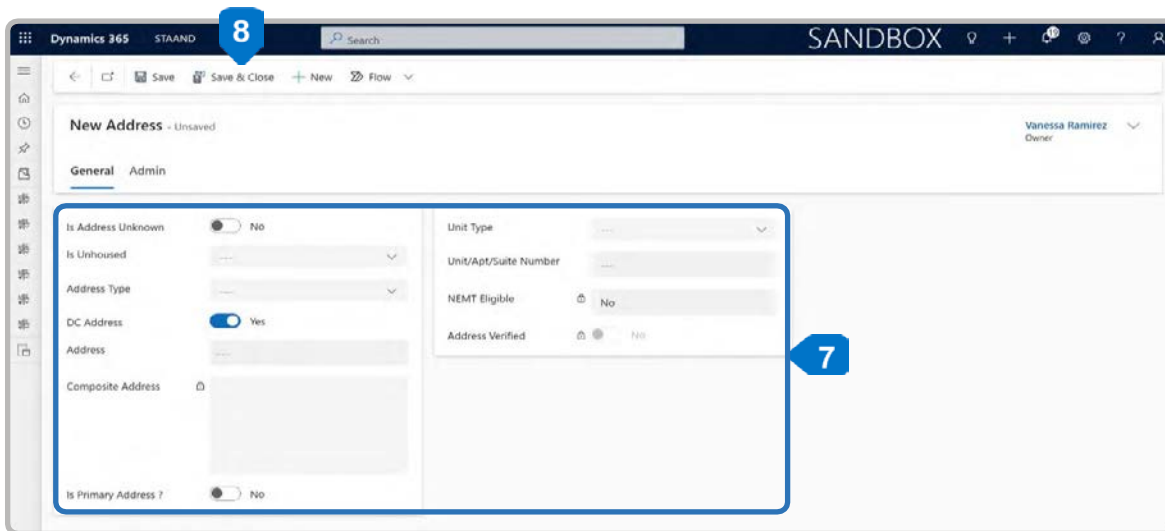
The screenshot shows the 'New Provider' form in Dynamics 365. The form is divided into several sections: Provider Information, Availability, Contact Information, Location Information, and Tax and Financial Information. The 'Provider Information' section contains fields for Provider Name, ID, Type, Category, Class, Agency, Facility, Type of Home, and Service at this Location. The 'Availability' section includes fields for Available status, Provider Status, Unavailability Reason, Total Provider Capacity, Last updated, and Current Availability. The 'Contact Information' section has fields for Primary and Secondary Contact. The 'Location Information' section includes Address, Main Phone, Other Phone Number, Email, Extension, and Distance. A 'Timeline' section is at the bottom with the text 'Almost there' and 'Select Save to see your timeline.' Blue callout boxes with numbers 2, 3, 4, and 5 are overlaid on the form. Callout 2 points to the Provider Category field, callout 3 points to the Provider Class field, callout 4 points to the Primary Contact field, and callout 5 points to the Save button in the top navigation bar.

Note:

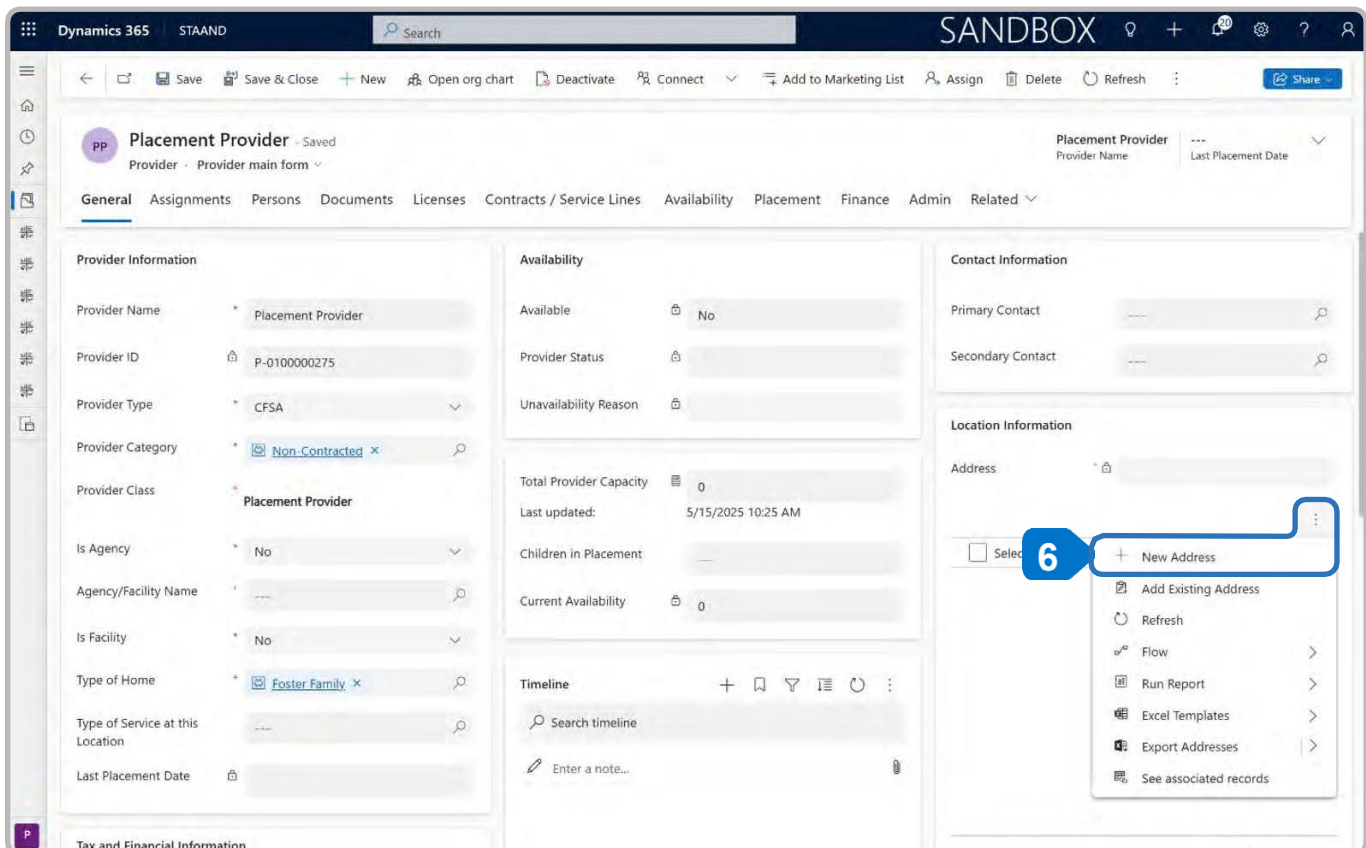
When selecting a Provider Category, a Provider can be classified as Contracted, Non-Contracted or both.

Note:

When adding the Primary Contact, search to see if the person record already exist first. If it does not exist, create the person record. Then edit the person record to add their date of birth, primary address, sex assigned at birth and preferred notification method.

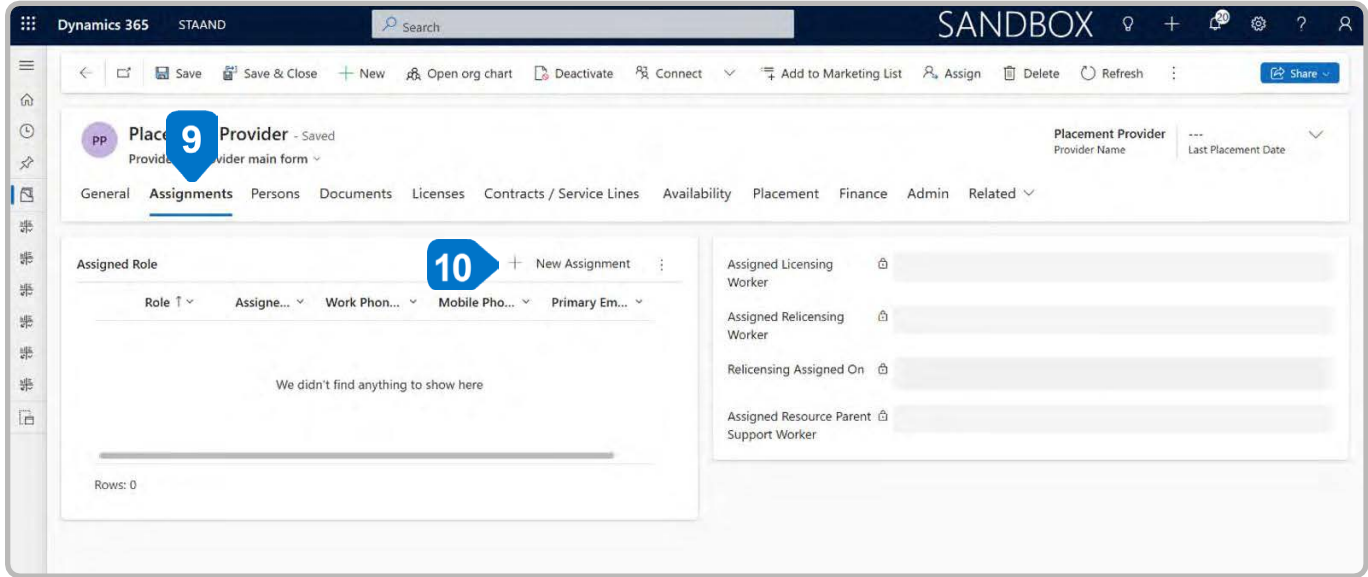


- From the Location Information subgrid, select + New Address or Add Existing Address (if you added it to the person record already in step 4). If not visible, select the more commands icon to view more options.

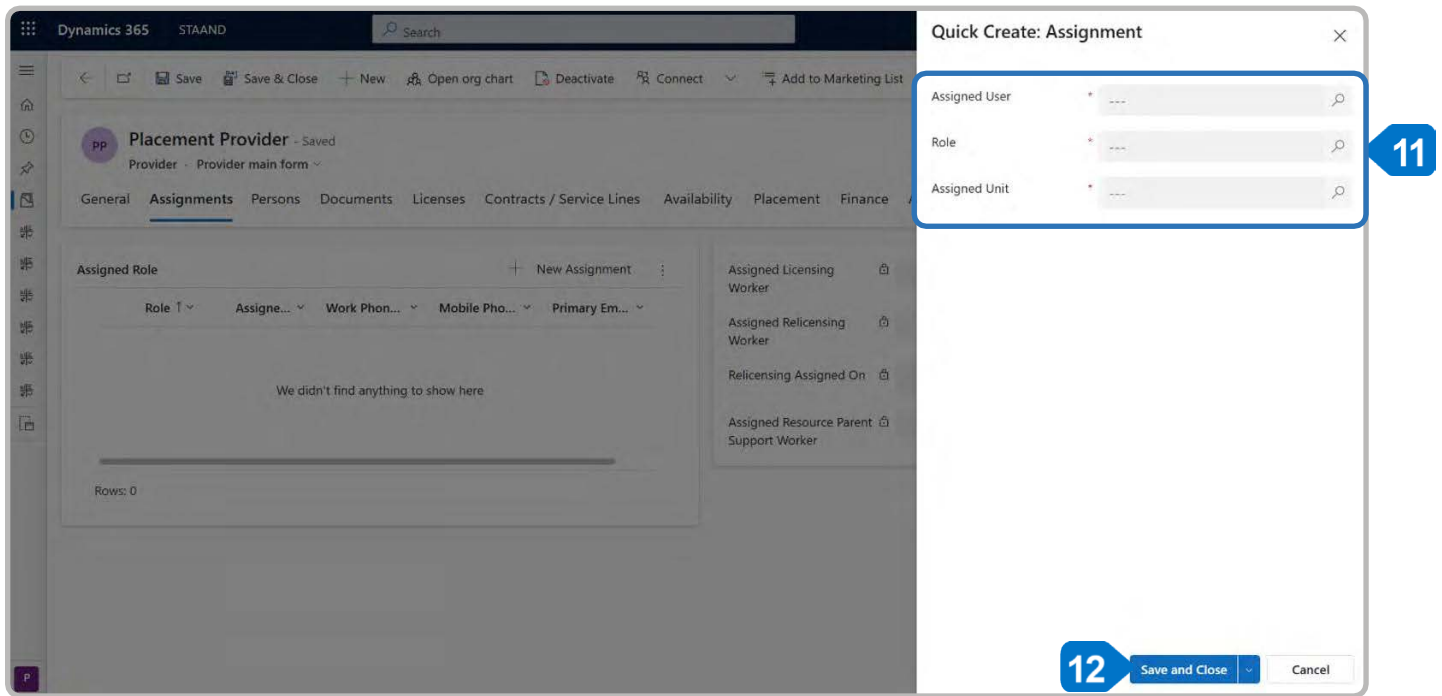


- Complete all fields.
- Select Save & Close. Note: addresses are verified via an integration with a database in real time and you are encouraged to refrain from adding unverified addresses to STAAND.

9. To assign a Provider record to a STAAND user, select the Assignments tab.
10. Select + New Assignment to create a new assignment role.



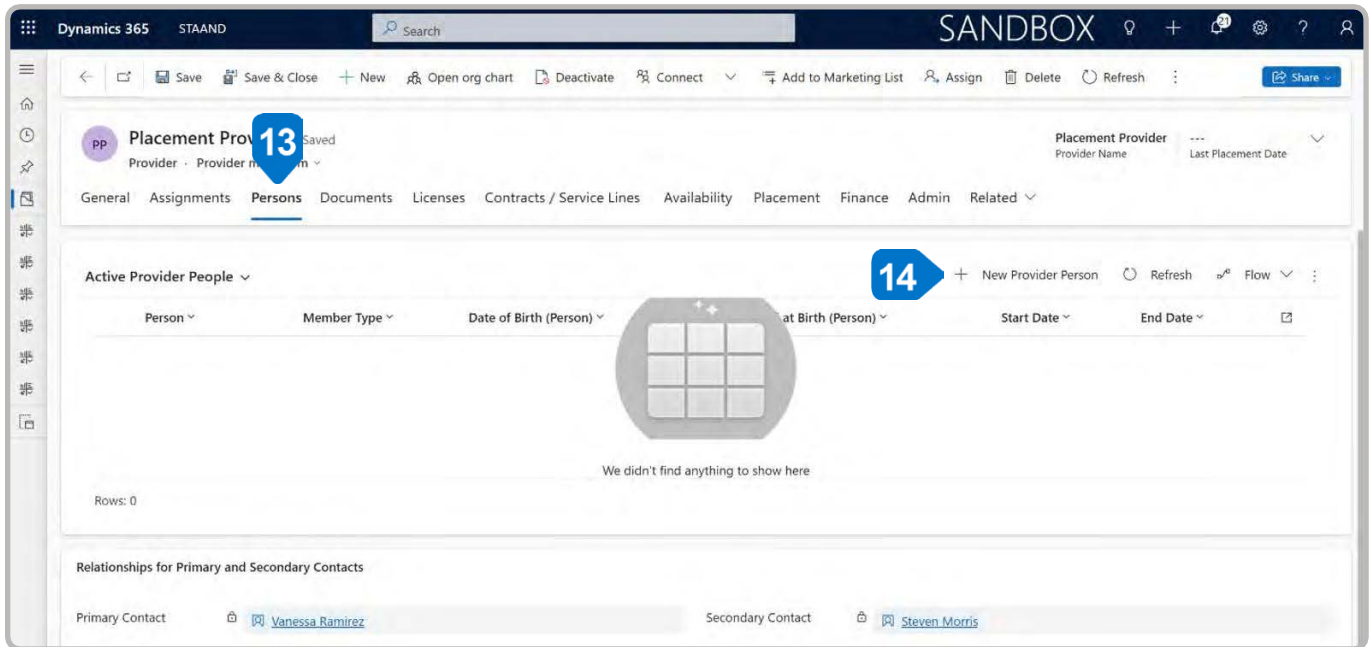
11. Complete all fields within the Quick Create: Assignment window.
12. Select Save and Close.



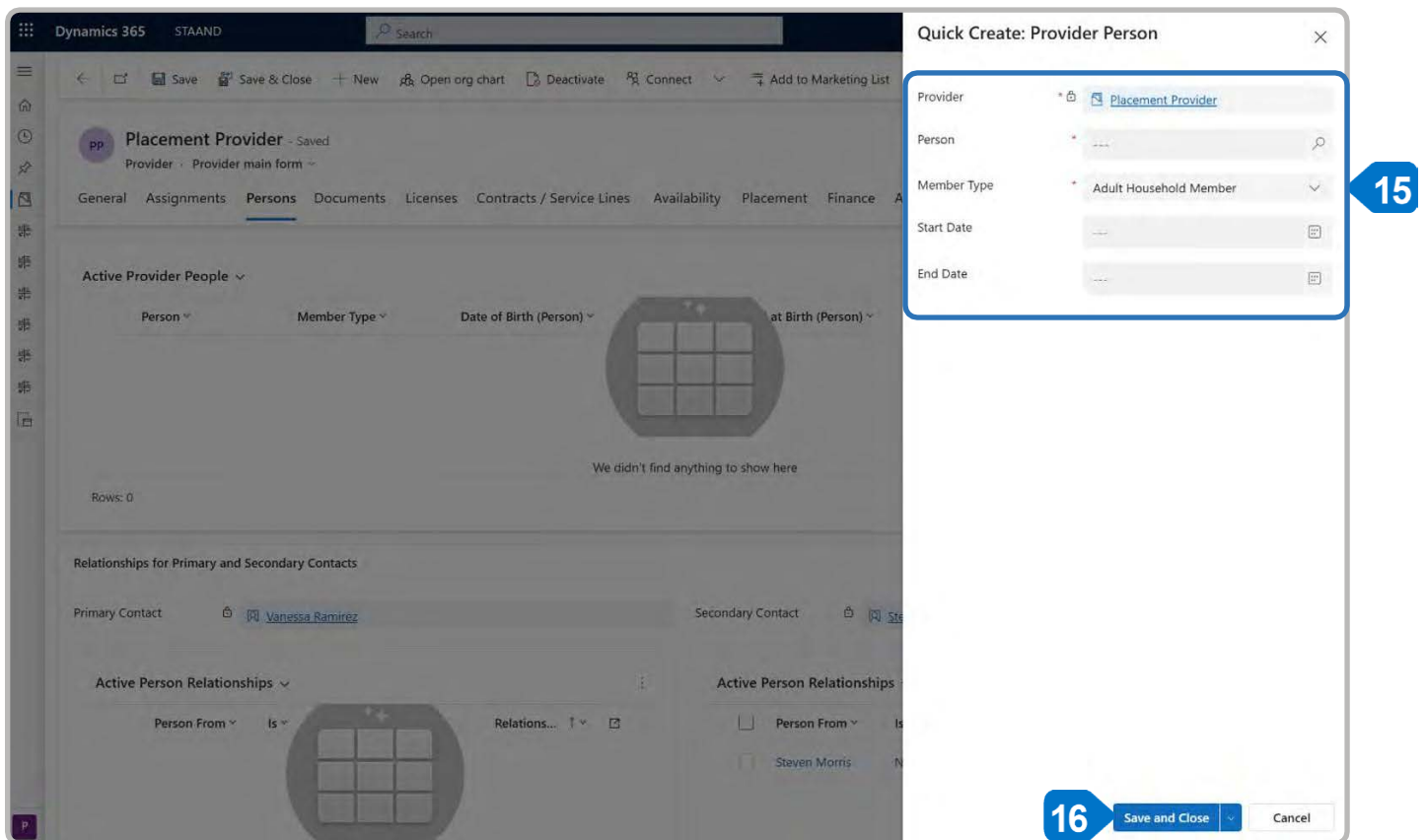
Important Tip:

User can create multiple assignments by repeating steps 10-12.

13. To add Persons (ex. Back-up caregiver, household member, etc.) to a Provider record, select the Persons tab.
14. Select + New Provider Person.

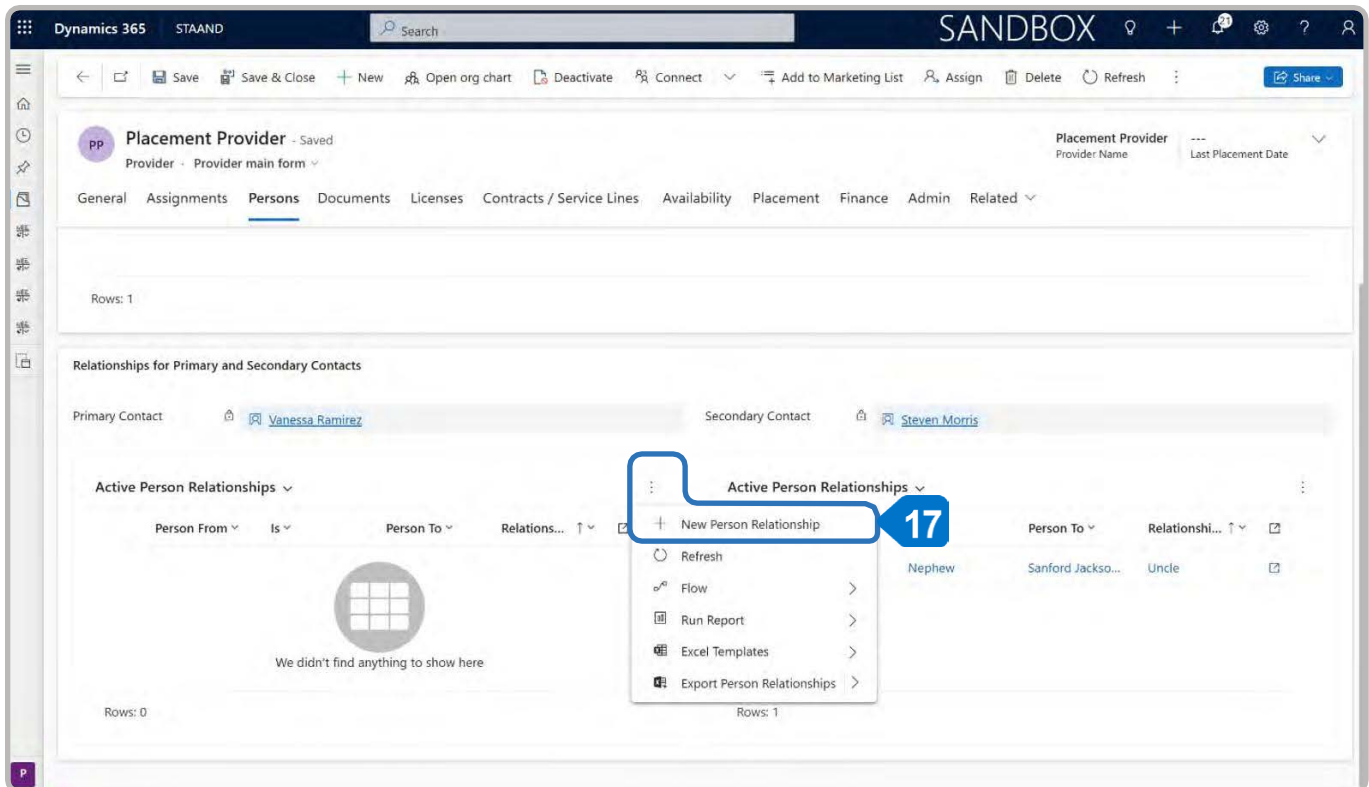


15. Complete all fields within the Quick Create: Provider Person window.
16. Select Save and Close.



Note: When adding Persons, please ensure that a Person Search is completed to ensure data quality and prevent creation of duplicate records in STAAND.

- 17. To add a New Person Relationship,** from the Active Persons Relationships subgrid, select + New Person Relationship. If not visible, select the more commands icon to view more options.

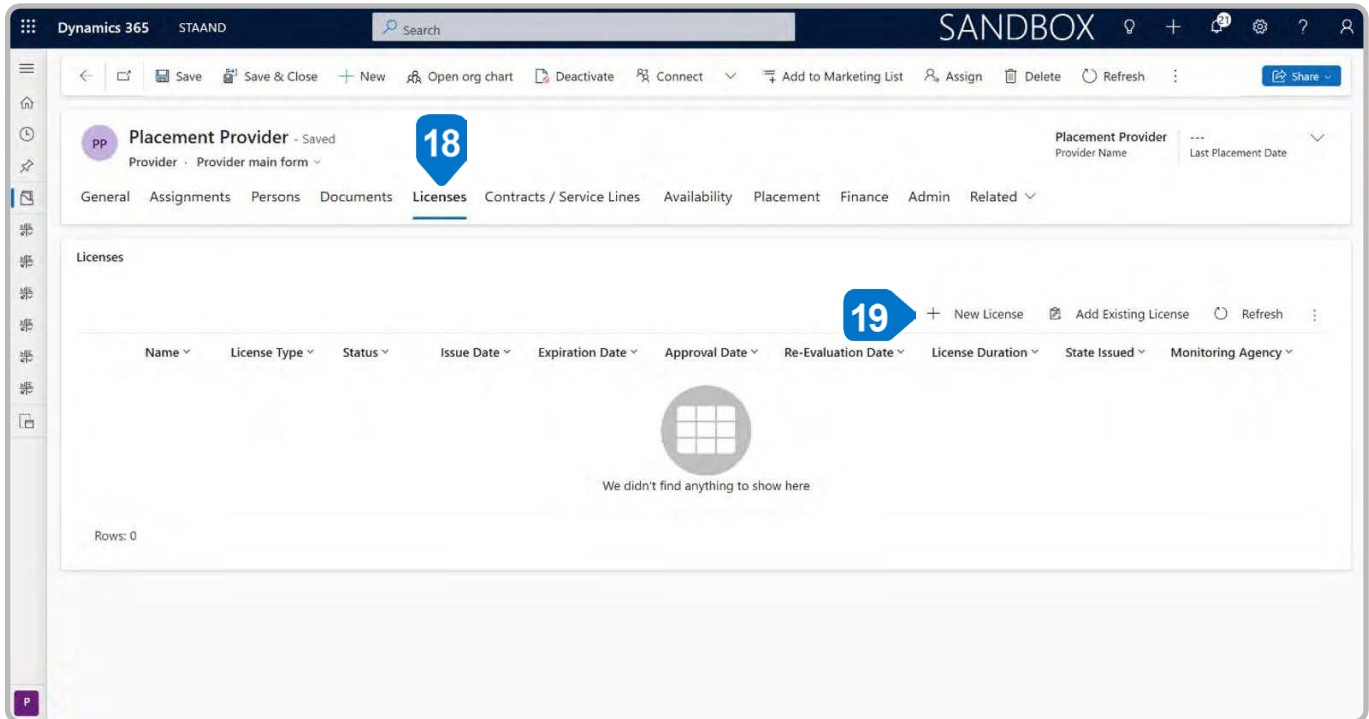


Important Tip:

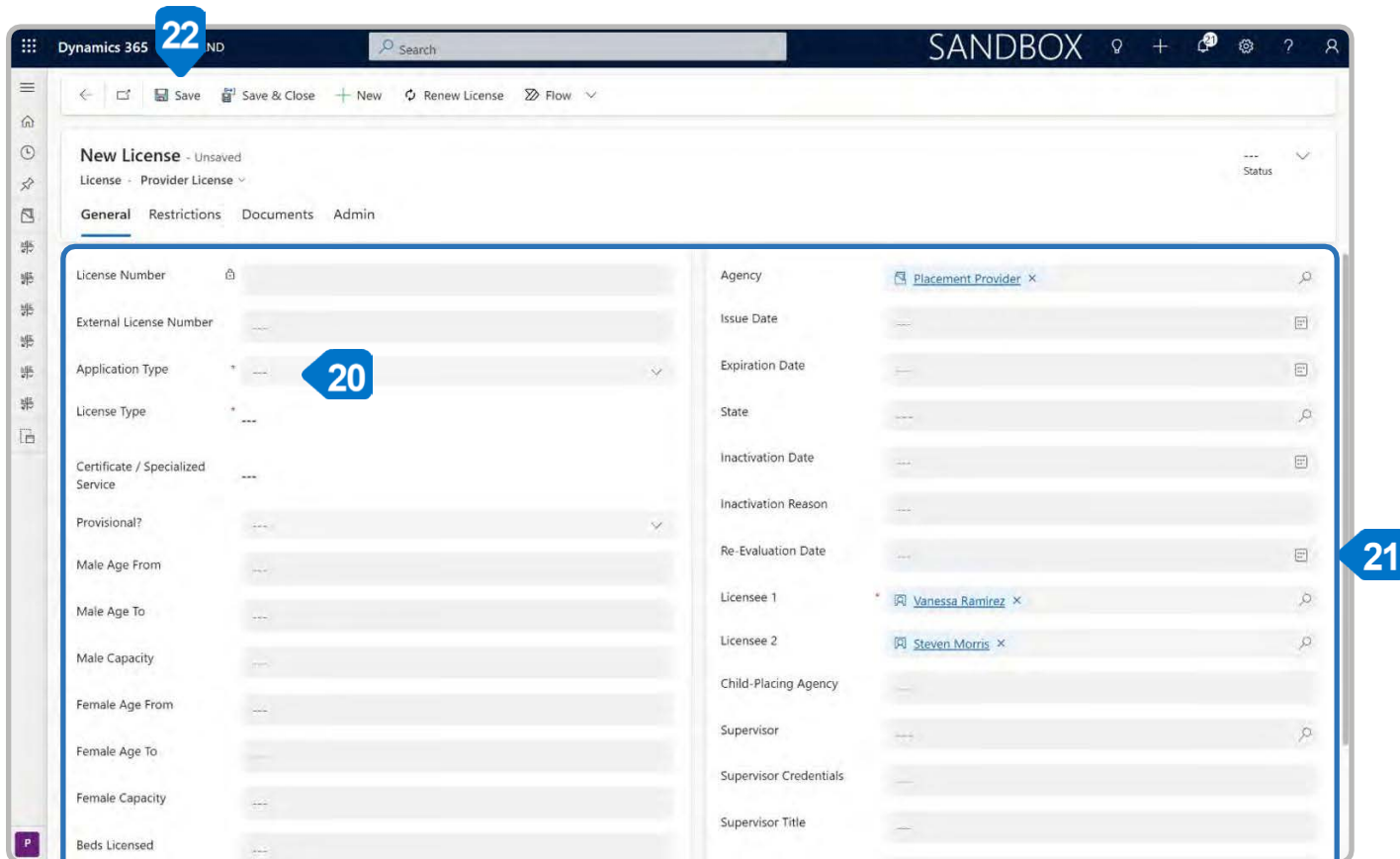
Adding a relationship for Primary and Secondary Contacts is not required and is at the discretion of User.

18. To add license information, select the Licenses tab.

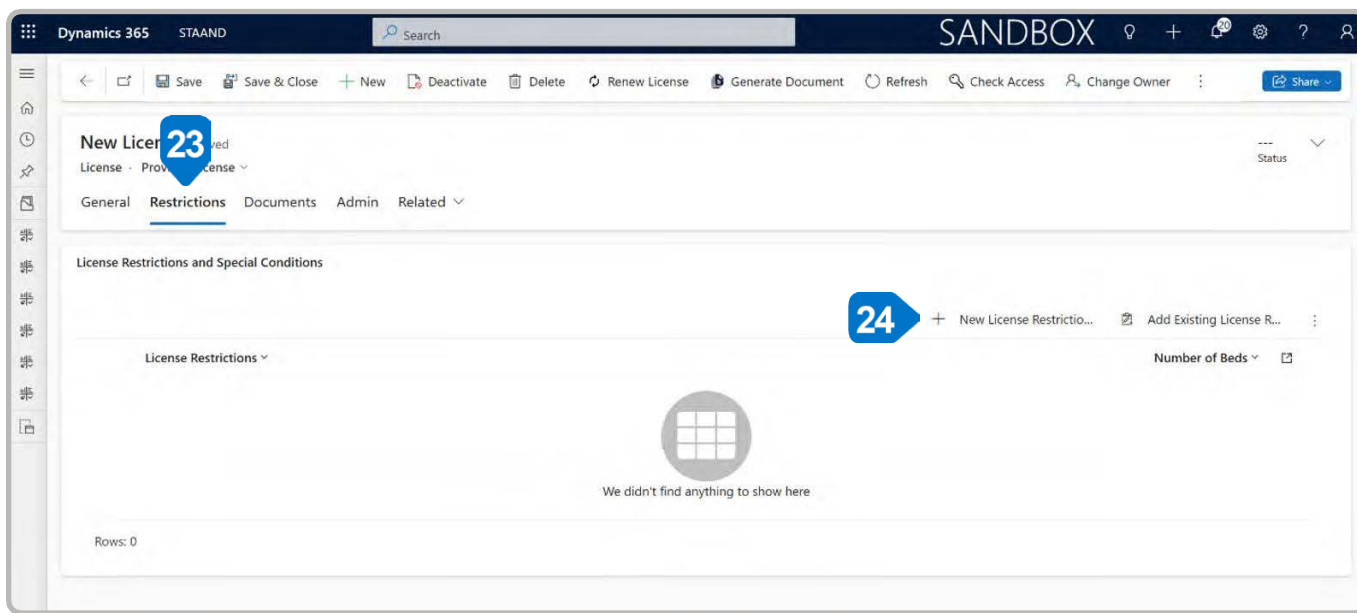
19. Select + New License.



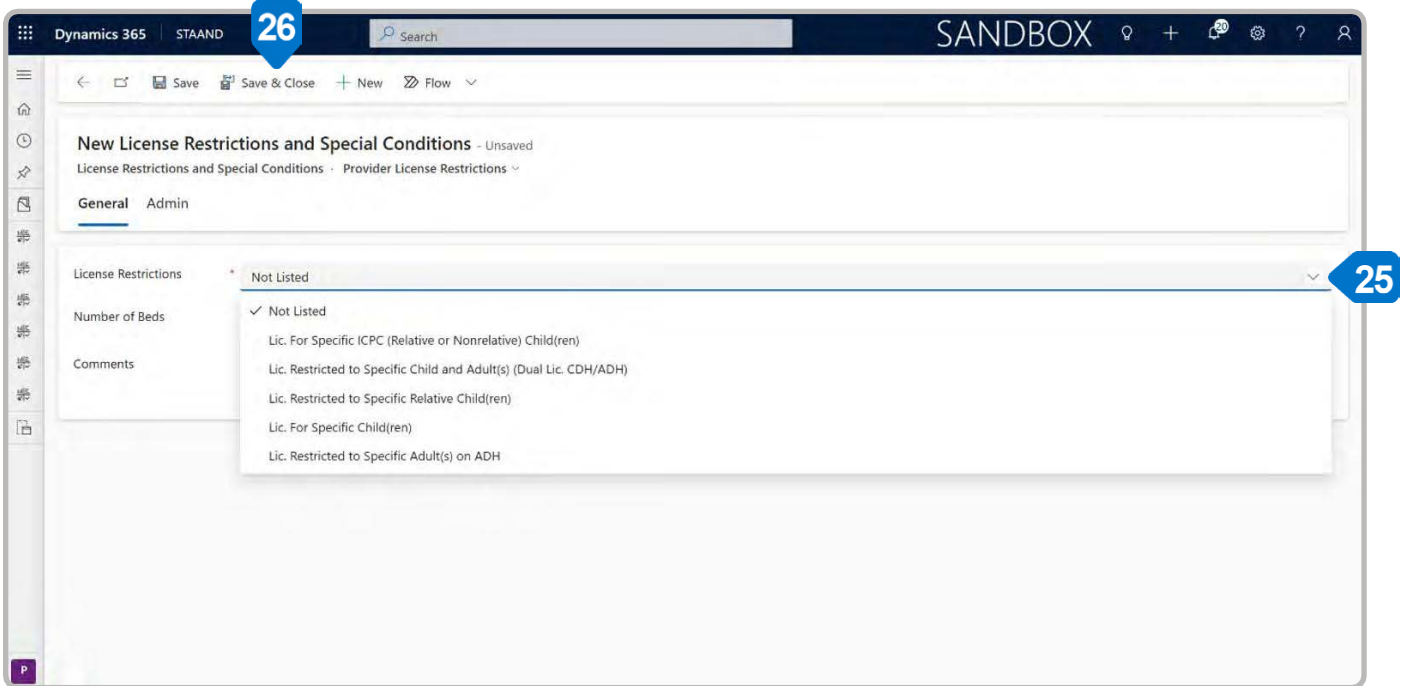
20. Select appropriate value for the Application Type field.
21. Complete all remaining fields.
22. Select Save.



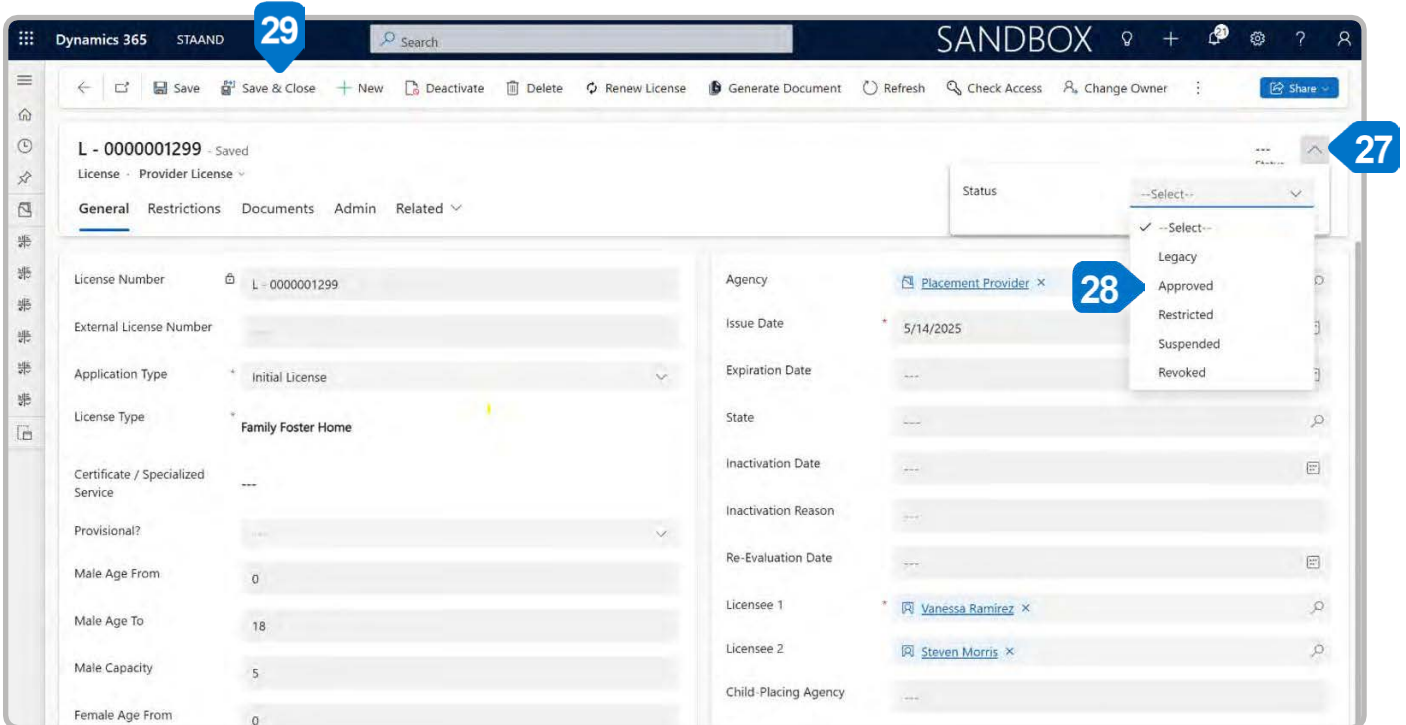
23. To add license restrictions, select the Restrictions tab.
24. Select + New License Restrictions to add any restrictions, if applicable.



25. Select the License Restrictions from the dropdown menu and complete all necessary information.
26. Select Save & Close.

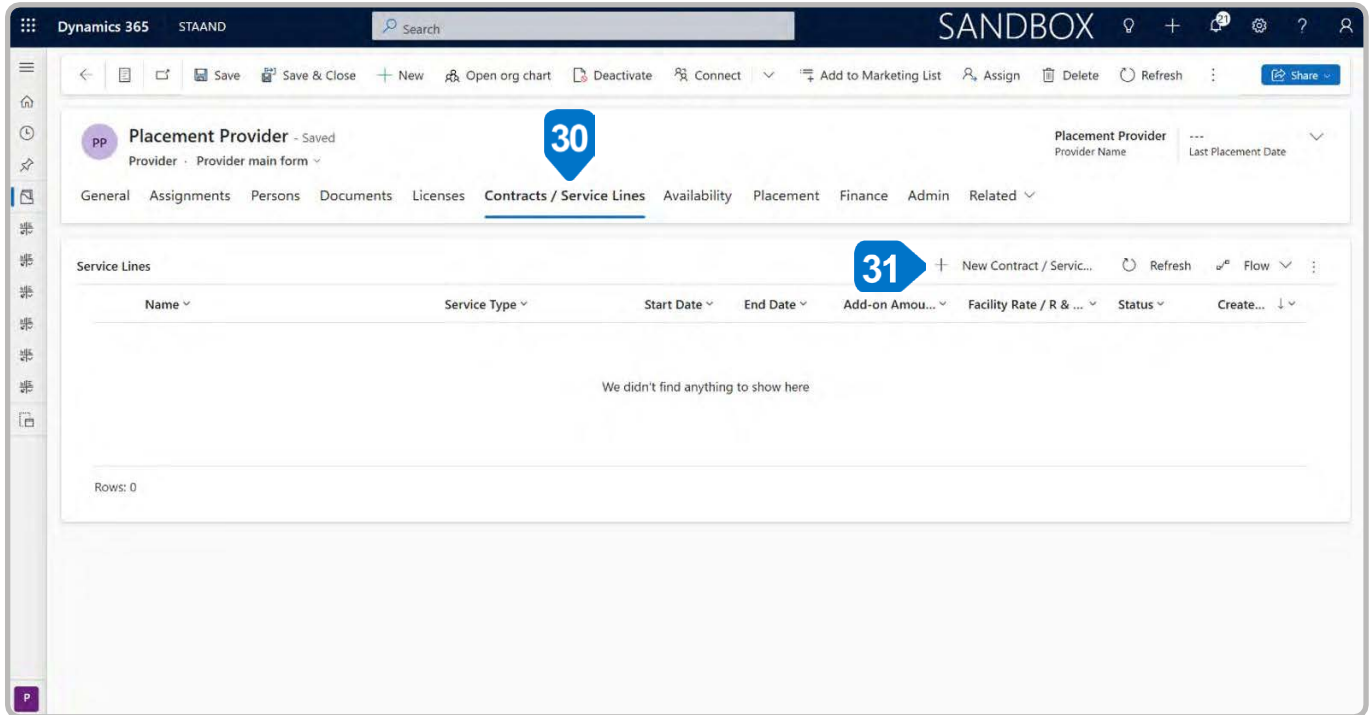


27. Select the caret to populate the status dropdown menu.
28. Select Approved from the dropdown menu in the top right corner.
29. Select Save & Close to return to the Provider record.



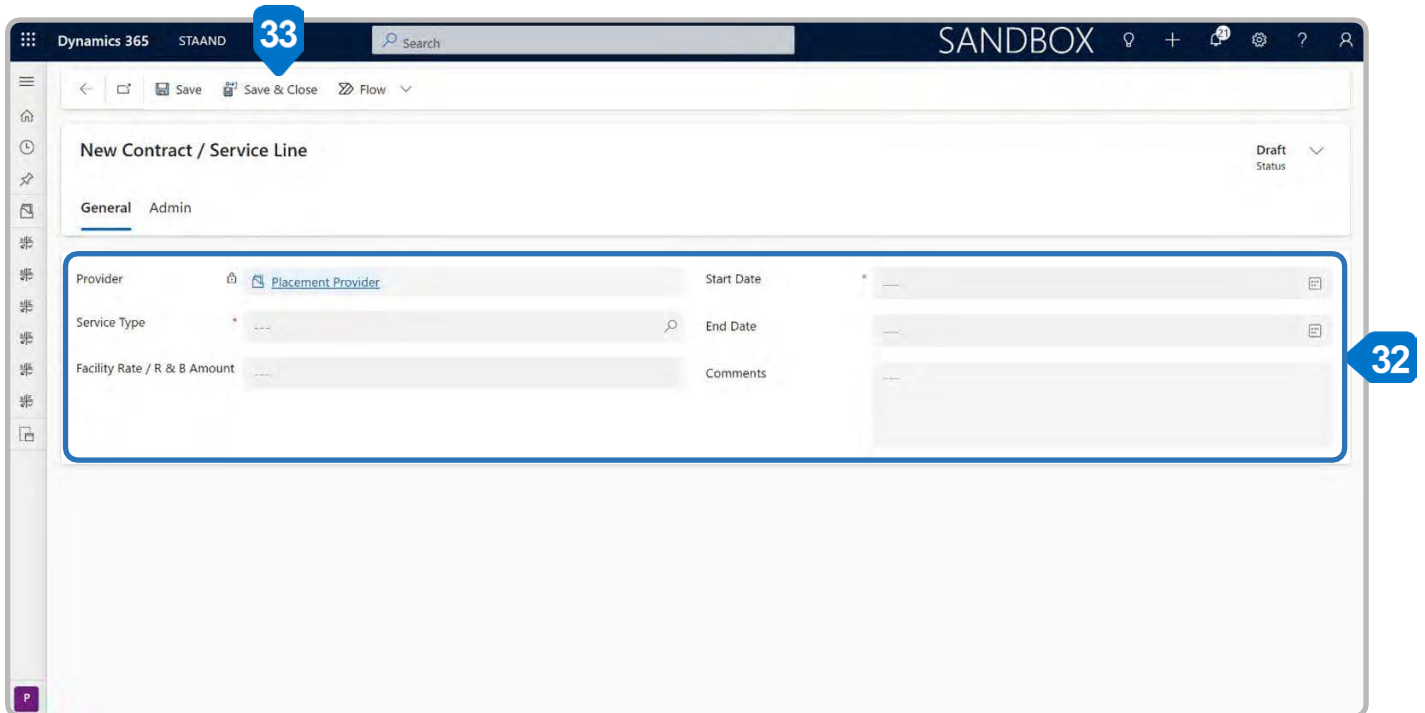
30. To add Contracts/Services information, select the Contracts/Service Lines tab.

31. To add a new contract, select + New Contract.



32. Complete all fields including Service Type, Start Date and End Date.

33. Select Save & Close.



34. Select Submit to submit the record for approval.

The screenshot displays the Dynamics 365 interface for a record titled "Traditional Foster Family" (Contract / Service Line). The record is in a "Draft" status. The main form includes fields for "Provider" (Placement Provider), "Start Date" (5/15/2025), "Service Type" (Traditional Foster Family), "End Date" (5/15/2026), and "Facility Rate / R & B Amount".

Below the main form is an "Approvals" section with a table. The table has columns for "Requestor", "Requested Date", "Approver", "Decision", and "Decision Date". The table is currently empty, displaying a message: "We didn't find anything to show here".

Requestor	Requested Date	Approver	Decision	Decision Date
We didn't find anything to show here				

Rows: 0

35. Complete all fields within the Quick Create: Approval window.
36. Select Save and Close.

The screenshot shows the Dynamics 365 interface for a 'Traditional Foster Family' record. The 'Quick Create: Approval' window is open, displaying the following fields:

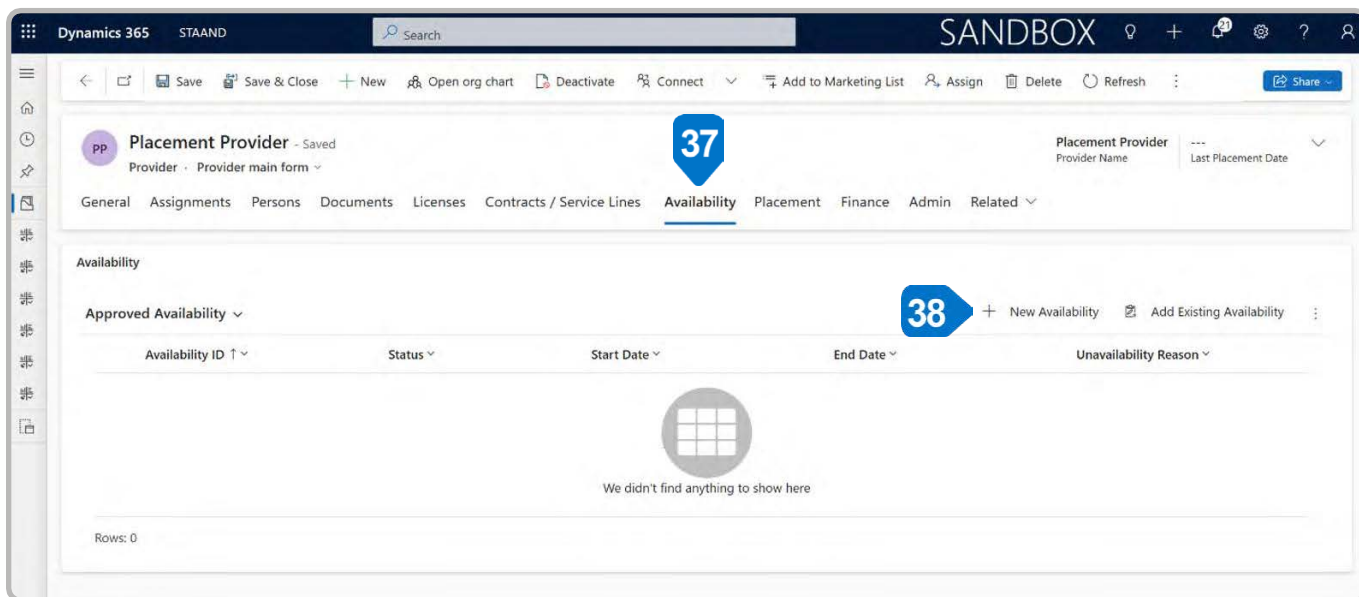
- Requester:** Vanessa Ramirez
- Approver:** ---
- Requester Comments:** ---
- To Be Approved:** Traditional Foster Family

A blue callout box with the number 35 points to the 'Requester' field. At the bottom of the window, a blue callout box with the number 36 points to the 'Save and Close' button.

Note:

To approve, please refer to [How To: Approve Provider Records](#) on page 61.

37. After approval, select the Availability tab within the Provider record to add new availability.
38. Select + New Availability.



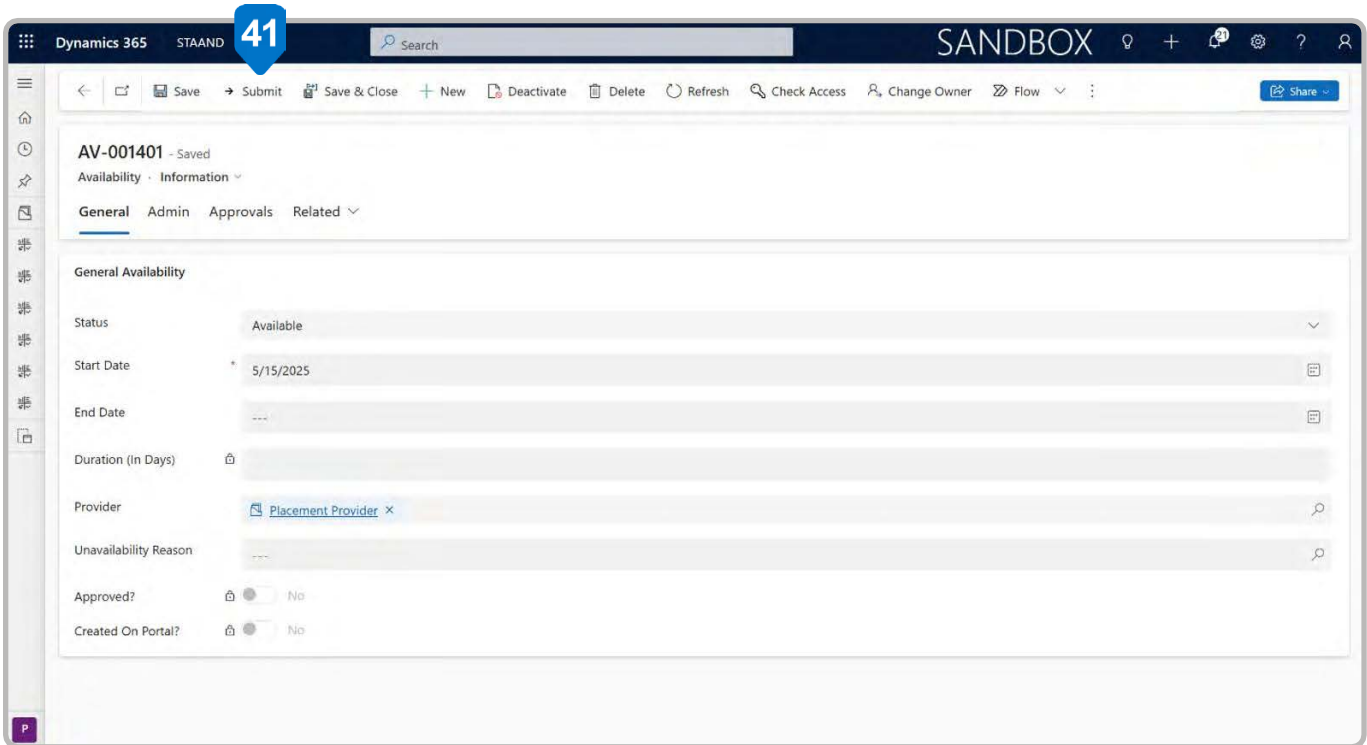
39. Complete all fields including Status and Start Date.
40. Select Save.



Note:

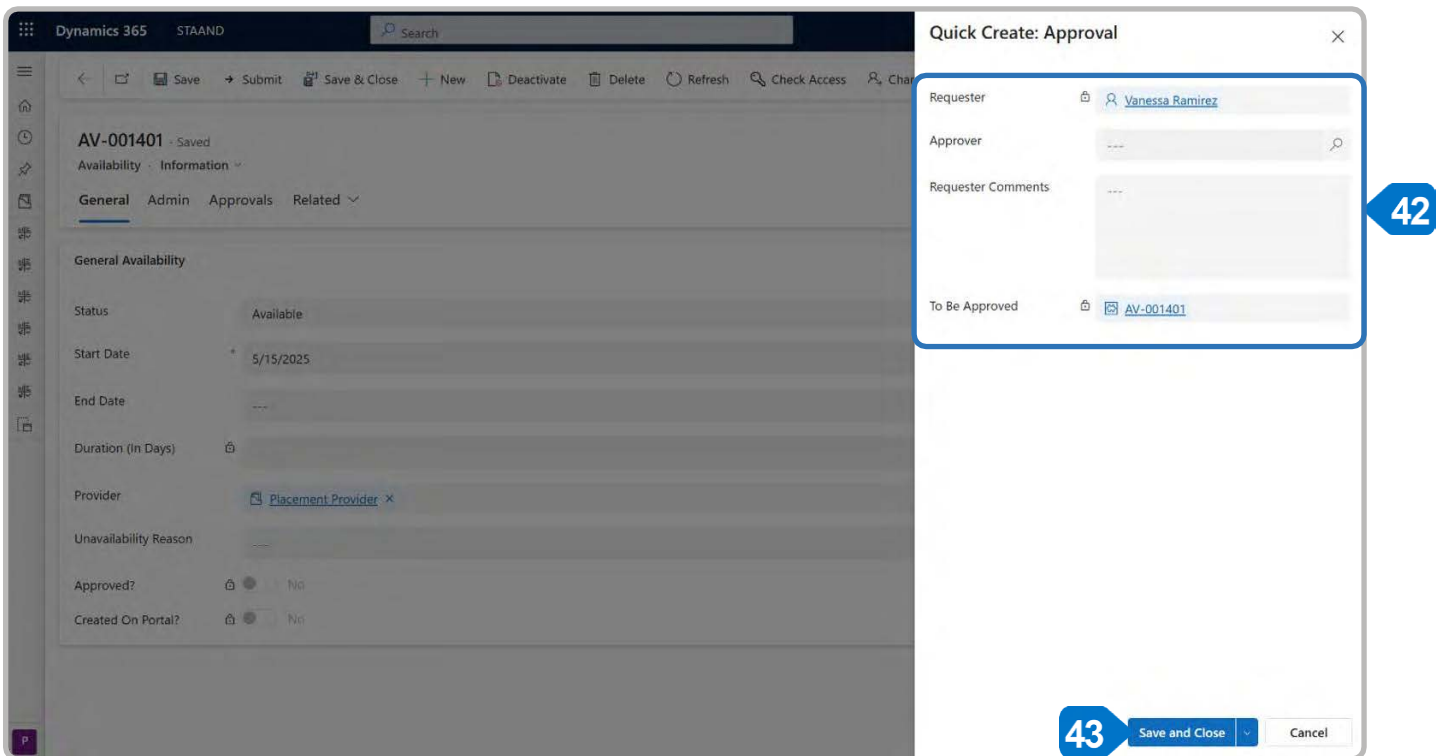
If an End Date is selected, the User will then need to select an Unavailability Reason from the dropdown menu.

41. Select Submit from the Action Toolbar to submit the record for approval.



42. Complete all fields within the Quick Create: Approval window.

43. Select Save and Close.



Note:

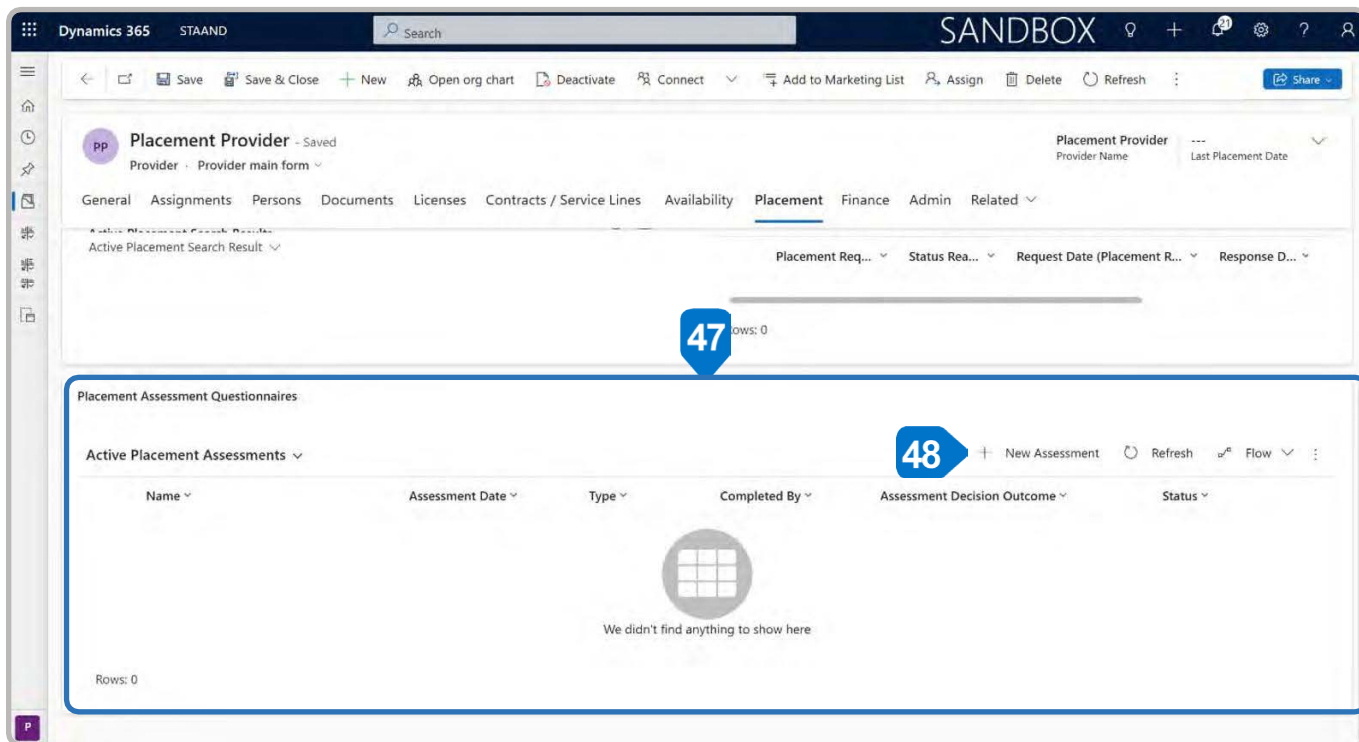
To approve, please refer to [How To: Approve Provider Records](#) on page 61.

44. Select the Approvals tab.
45. Once the Provider availability is approved, it will populate in the approvals subgrid.
46. Select Save & Close.

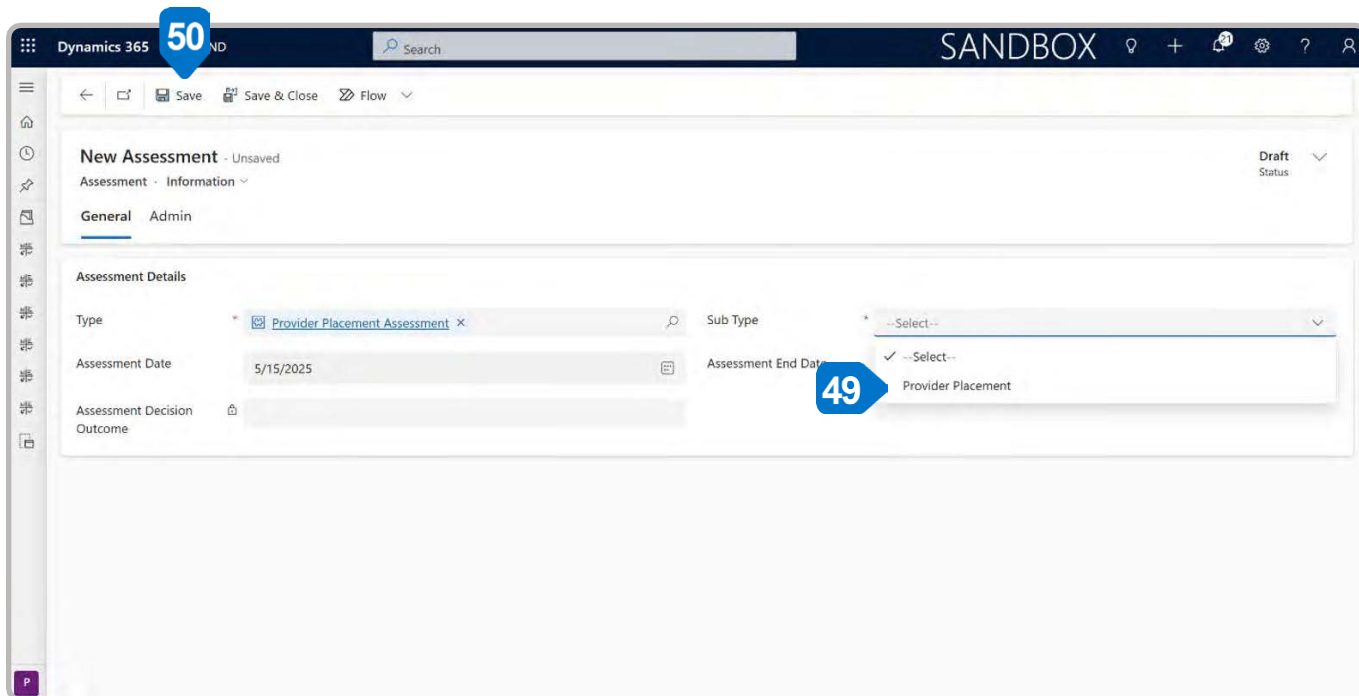
The screenshot displays the Dynamics 365 interface for an Availability record (AV-001401). The 'Approvals' tab is selected, showing a subgrid with one approval entry. The subgrid has columns for Requestor, Requested Date, Approver, Decision, and Decision Date. The entry shows that Vanessa Ramirez requested the approval on 5/15/2025 at 11:18 AM, and it was approved by Vanessa Ramirez on 5/15/2025 at 4:19 PM. The interface includes a top navigation bar with 'Dynamics 365', 'STAAND', and 'SANDBOX' labels, and a left-hand navigation pane. Callout boxes with numbers 44 and 45 highlight the 'Approvals' tab and the approval entry, respectively.

Requestor	Requested Date	Approver	Decision	Decision Date
Vanessa Ramirez	5/15/2025 11:18 AM	Vanessa Ramirez	Approved	5/15/2025 4:19 PM

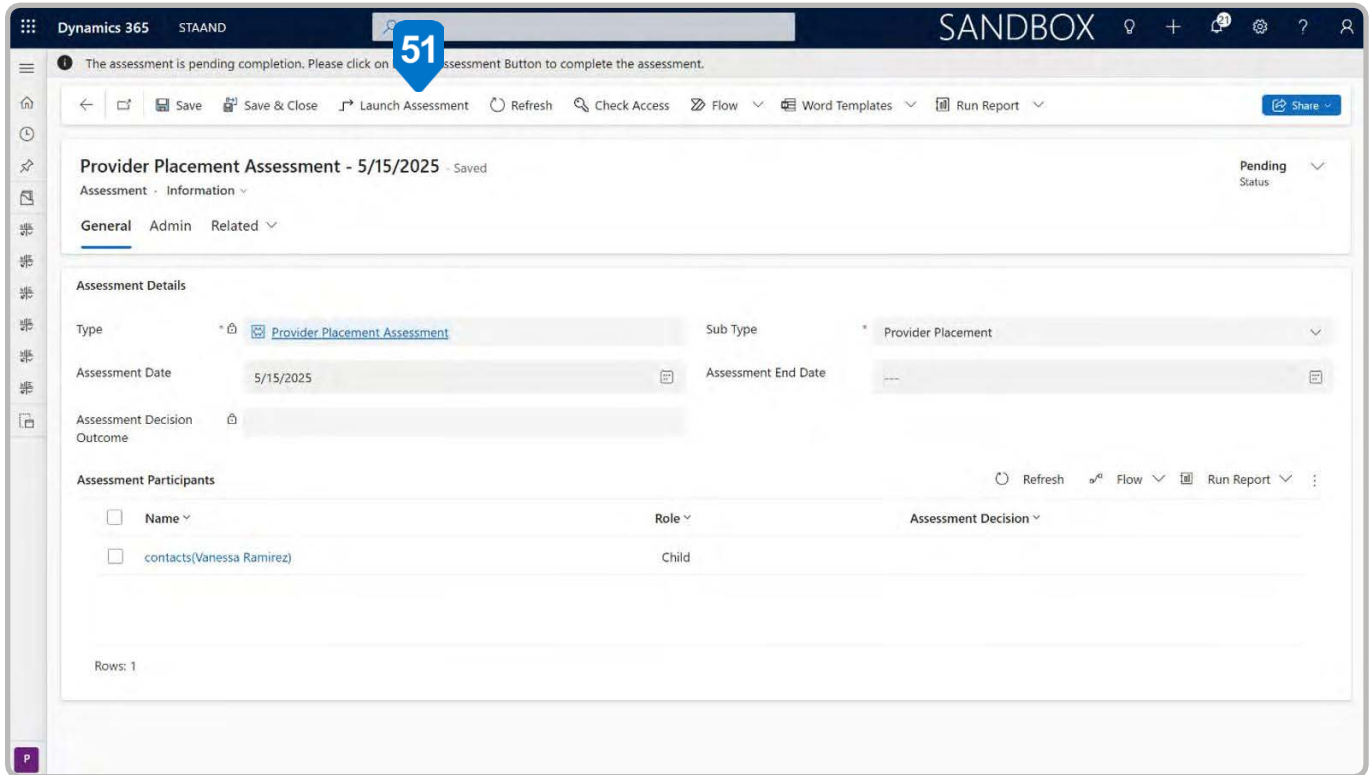
47. To add a new **Provider Questionnaire** that is used to match placement providers with children in need of a placement, from the Provider record, navigate to the Placement Assessment Questionnaires subgrid within the Placement tab.
48. Select + New Assessment.



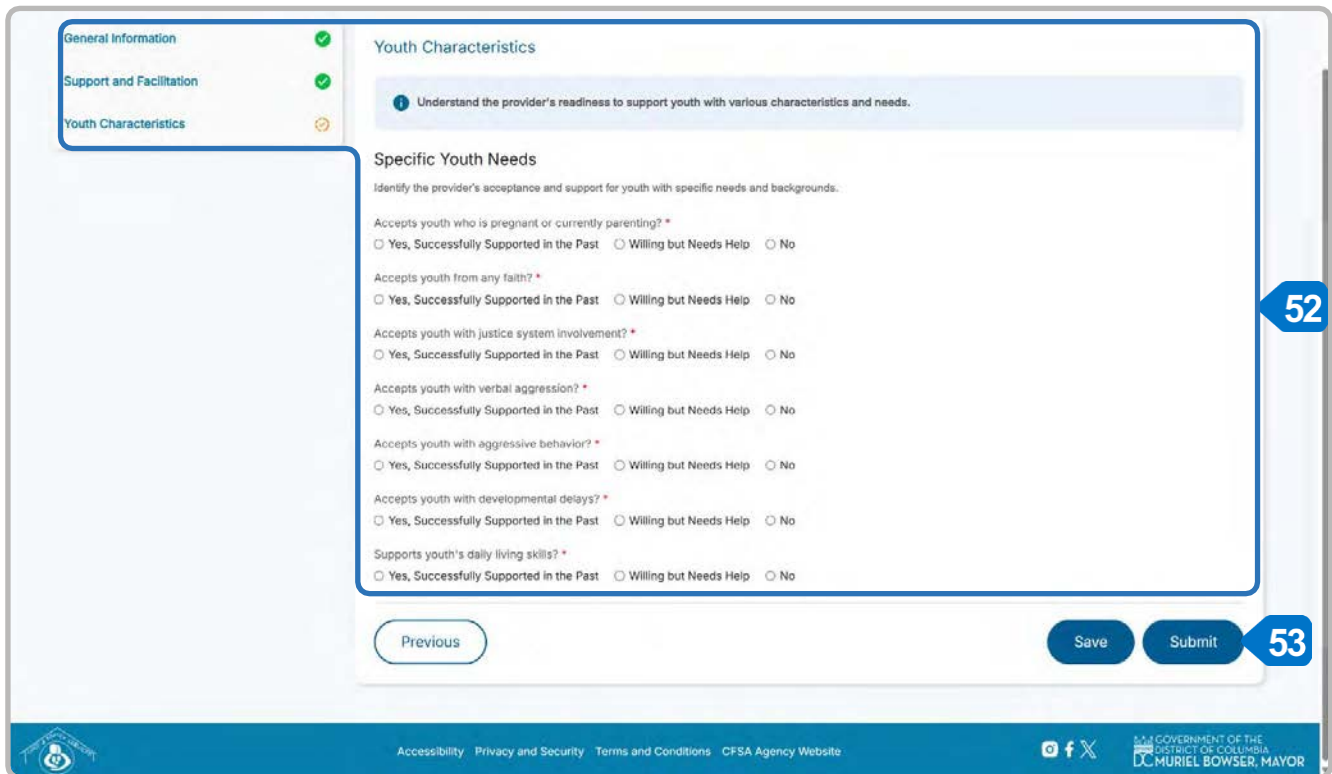
49. Select Provider Placement for the Sub Type.
50. Select Save.



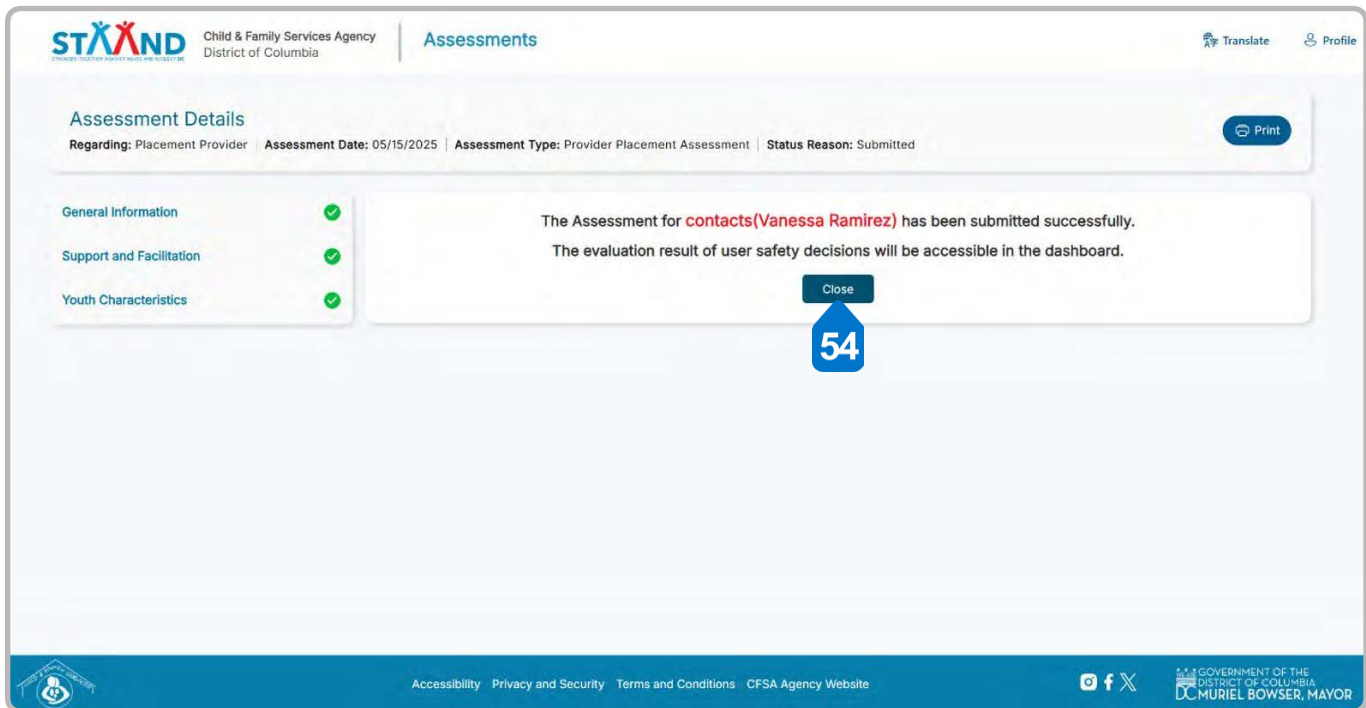
51. Select Launch Assessment. Note: if the Launch Assessment button does not show immediately, save or refresh the page.



52. Answer all questions within the questionnaire.
53. Once completed select Submit.

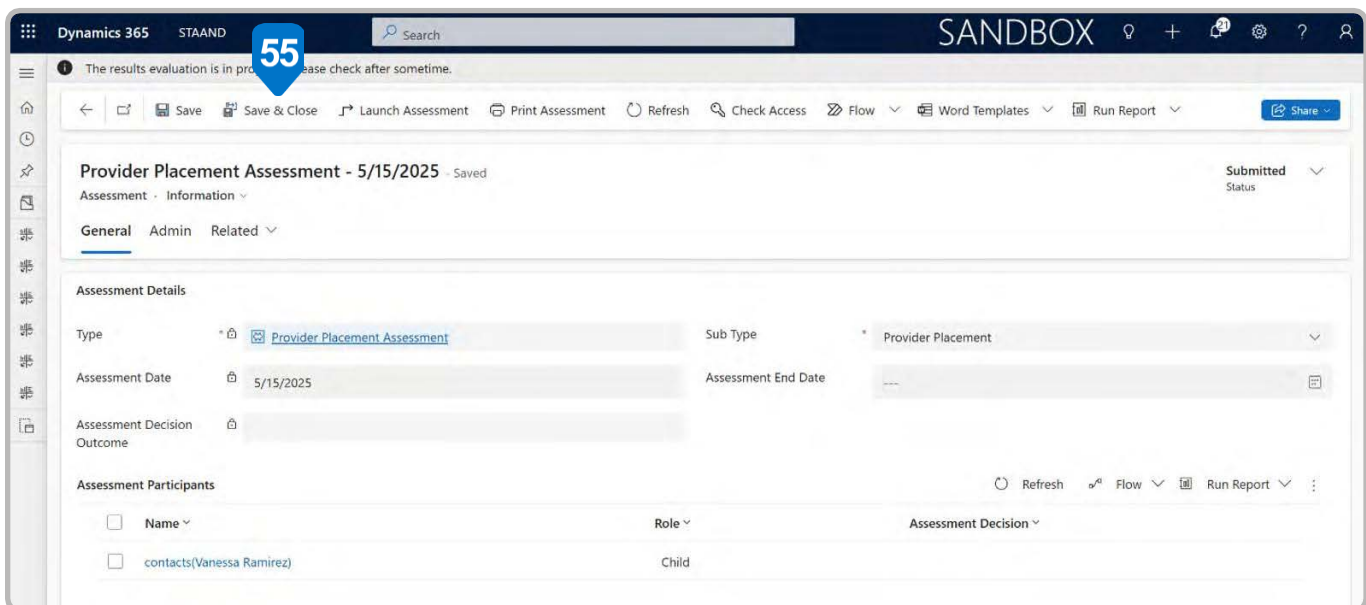


54. Select Close to return to the STAAND application.



The screenshot shows the STAAND Assessments page. The header includes the STAAND logo, "Child & Family Services Agency District of Columbia", and "Assessments". The main content area displays "Assessment Details" with a "Print" button. Below this, there are three sections: "General Information", "Support and Facilitation", and "Youth Characteristics", each with a green checkmark. A central message states: "The Assessment for **contacts(Vanessa Ramirez)** has been submitted successfully. The evaluation result of user safety decisions will be accessible in the dashboard." A blue "Close" button is highlighted with a blue circle containing the number "54". The footer contains links for Accessibility, Privacy and Security, Terms and Conditions, and CFS Agency Website, along with social media icons and the DC Government logo.

55. Select Save & Close.



The screenshot shows the Dynamics 365 STAAND interface. The top navigation bar includes "Dynamics 365", "STAAND", a search bar, and "SANDBOX". A blue circle with the number "55" points to the "Save & Close" button in the top toolbar. The main content area displays "Provider Placement Assessment - 5/15/2025 - Saved" with a "Submitted Status" dropdown. Below this, there are tabs for "General", "Admin", and "Related". The "Assessment Details" section shows fields for "Type" (Provider Placement Assessment), "Sub Type" (Provider Placement), "Assessment Date" (5/15/2025), and "Assessment End Date". The "Assessment Decision Outcome" field is empty. The "Assessment Participants" section shows a table with columns for "Name", "Role", and "Assessment Decision". The table contains one row: "contacts(Vanessa Ramirez)" with the role "Child".

56. Any Invoices related to the Provider will populate in the Finance tab.

Dynamics 365 STAAND Search SANDBOX

Save Save & Close + New Open org chart Deactivate Connect Add to Marketing List Assign Delete Refresh Share

PA Parent Agency Provider - Saved 56 Parent Agency Provider Provider Name Last Placement Date

General Assignments Persons Documents Licenses Contracts / Service Lines Availability Finance Admin Related

Episodic Service Logs Add Existing Service L... Direct Placement

Entry ID	Assigned Agency	Provider	Child	Start Date	End Date	Contract (Contract/...	Contract/Service ...	Service Type (C...	Created On
We didn't find anything to show here									
Rows: 0									

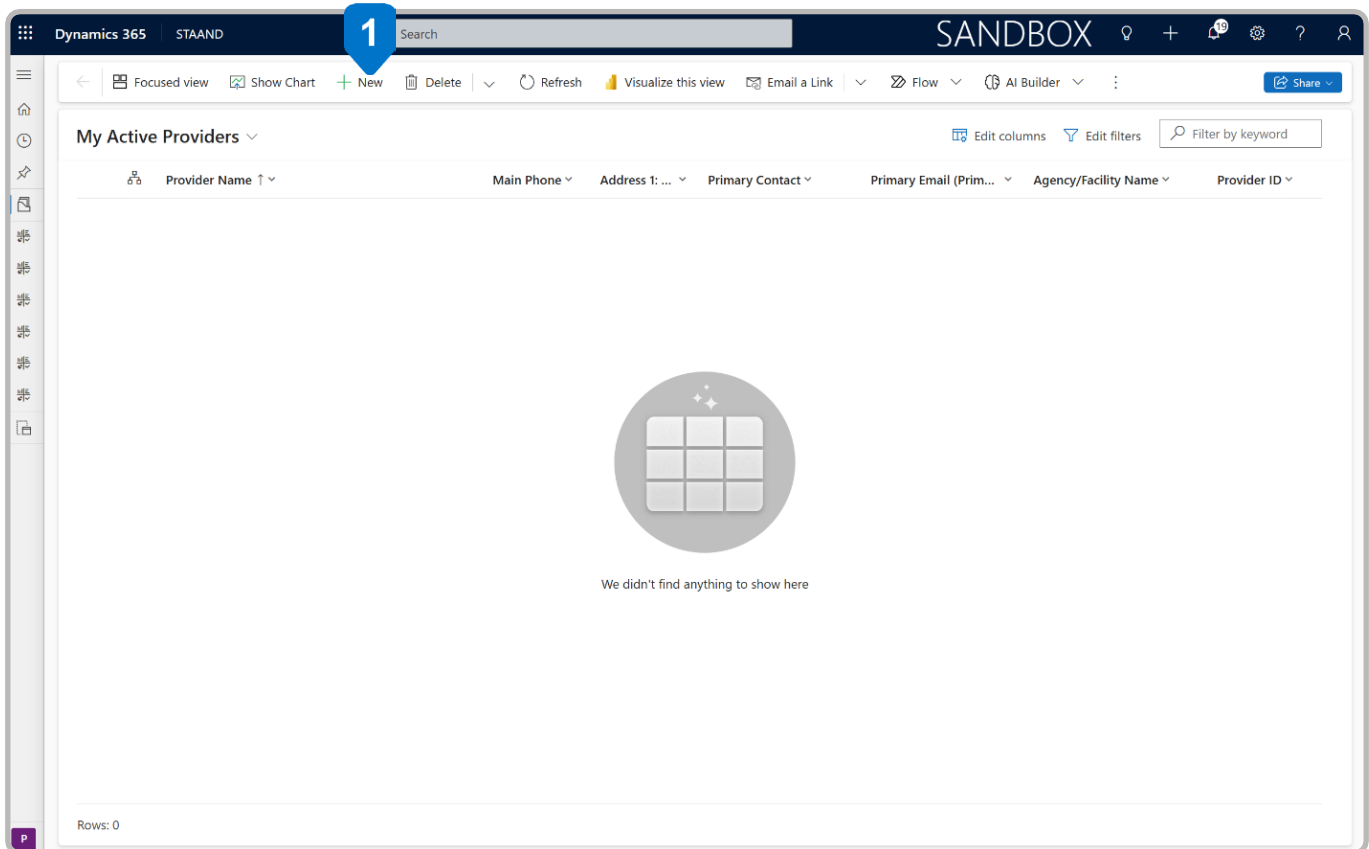
Invoices + New Invoice Refresh Flow

Invoice Nu...	Agency/Prov...	Service Type	Invoice Amo...	Invoice Approved Am...	Invoice Paid Amo...	Invoice Submitte...	Invoice Sta...	Approval St...
We didn't find anything to show here								
Rows: 0								

How To: Create an Agency Provider

An agency is generally a third-party provider, with the parent agency overseeing multiple associated facilities.

1. From the Provider work area, select + New from the Action Toolbar.



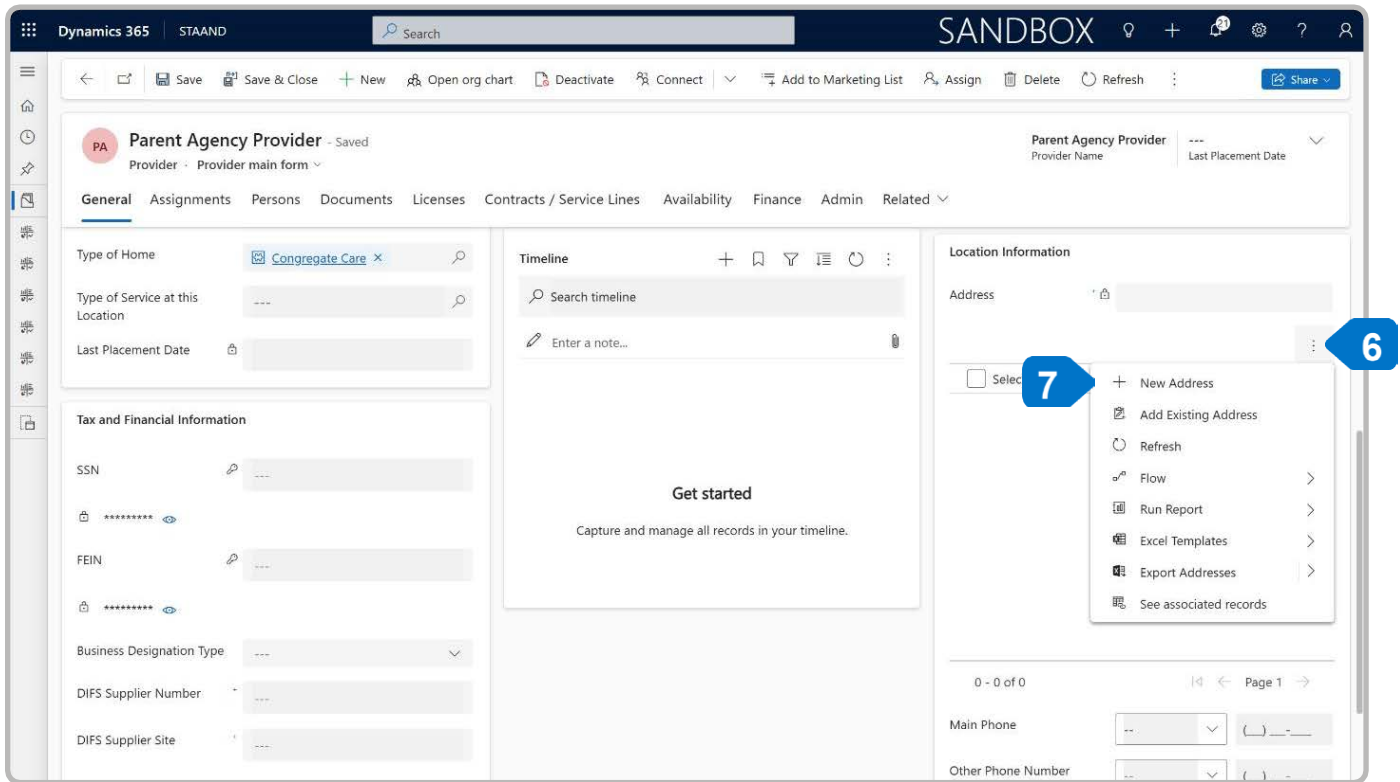
2. Complete all fields including, Provider Category, and Provider Class.
3. Select Yes in the “Is Agency” field.
4. Enter a Primary Contact, within the Contact Information subgrid.
5. Select Save.

The screenshot shows the Dynamics 365 'New Provider' form in a 'SANDBOX' environment. The form is divided into several sections: 'Provider Information', 'Availability', 'Contact Information', 'Location Information', and 'Tax and Financial Information'. A blue callout '5' is positioned at the top left of the form. A blue callout '2' points to the 'Provider Category' field in the 'Provider Information' section. A blue callout '3' points to the 'Is Agency' dropdown menu in the 'Provider Information' section. A blue callout '4' points to the 'Primary Contact' field in the 'Contact Information' section. The 'Availability' section includes fields for 'Available' (set to 'No'), 'Provider Status', and 'Unavailability Reason'. The 'Location Information' section includes fields for 'Address', 'Main Phone', 'Other Phone Number', 'Email', 'Extension', and 'Distance'. The 'Tax and Financial Information' section is partially visible at the bottom left. The form is titled 'New Provider' and includes a search bar at the top.

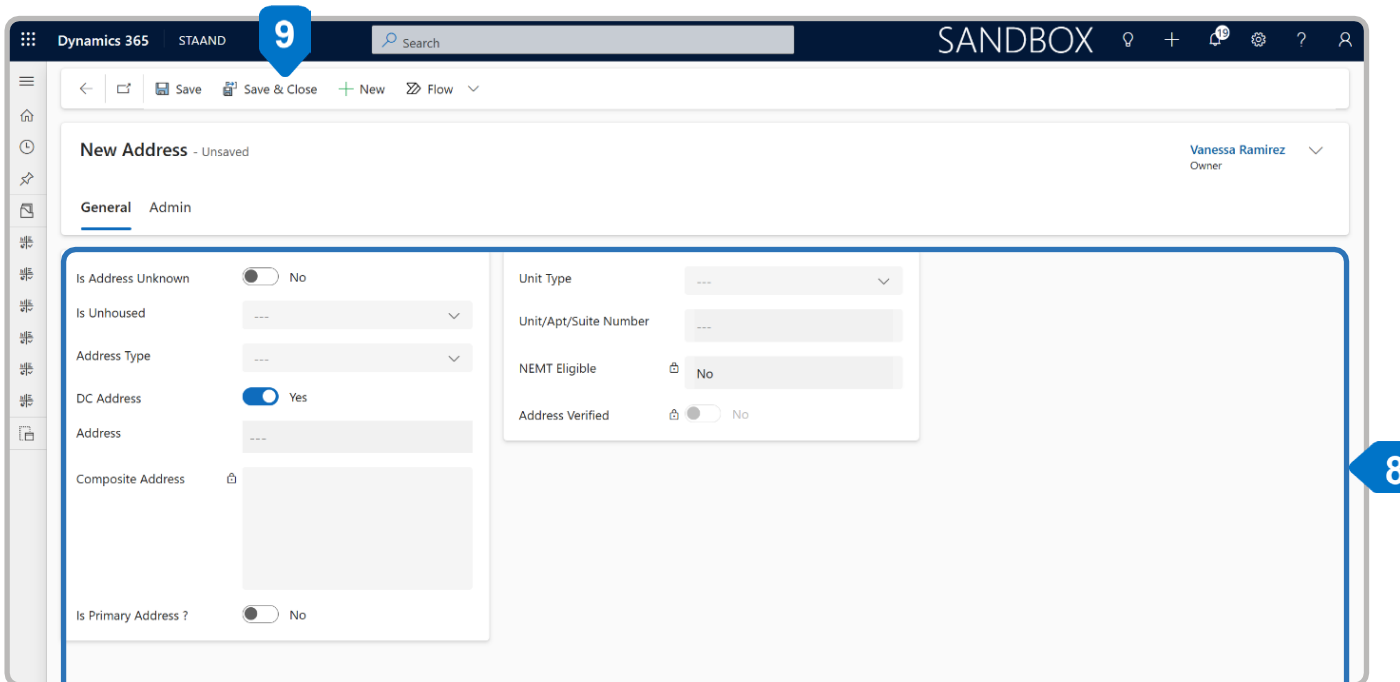
Note:

When selecting a Provider Category, a Provider can be classified as Contracted, Non-Contracted, or both.

6. From the Location Information sub-grid, select the more commands icon.
7. Select + New Address.



8. Complete all fields.
9. Select Save & Close.



10. To assign the Provider record, select the Assignments tab.

The screenshot shows the Dynamics 365 interface for a 'Parent Agency Provider' record. The 'Assignments' tab is selected, and a blue callout box with the number '10' points to it. The record details are as follows:

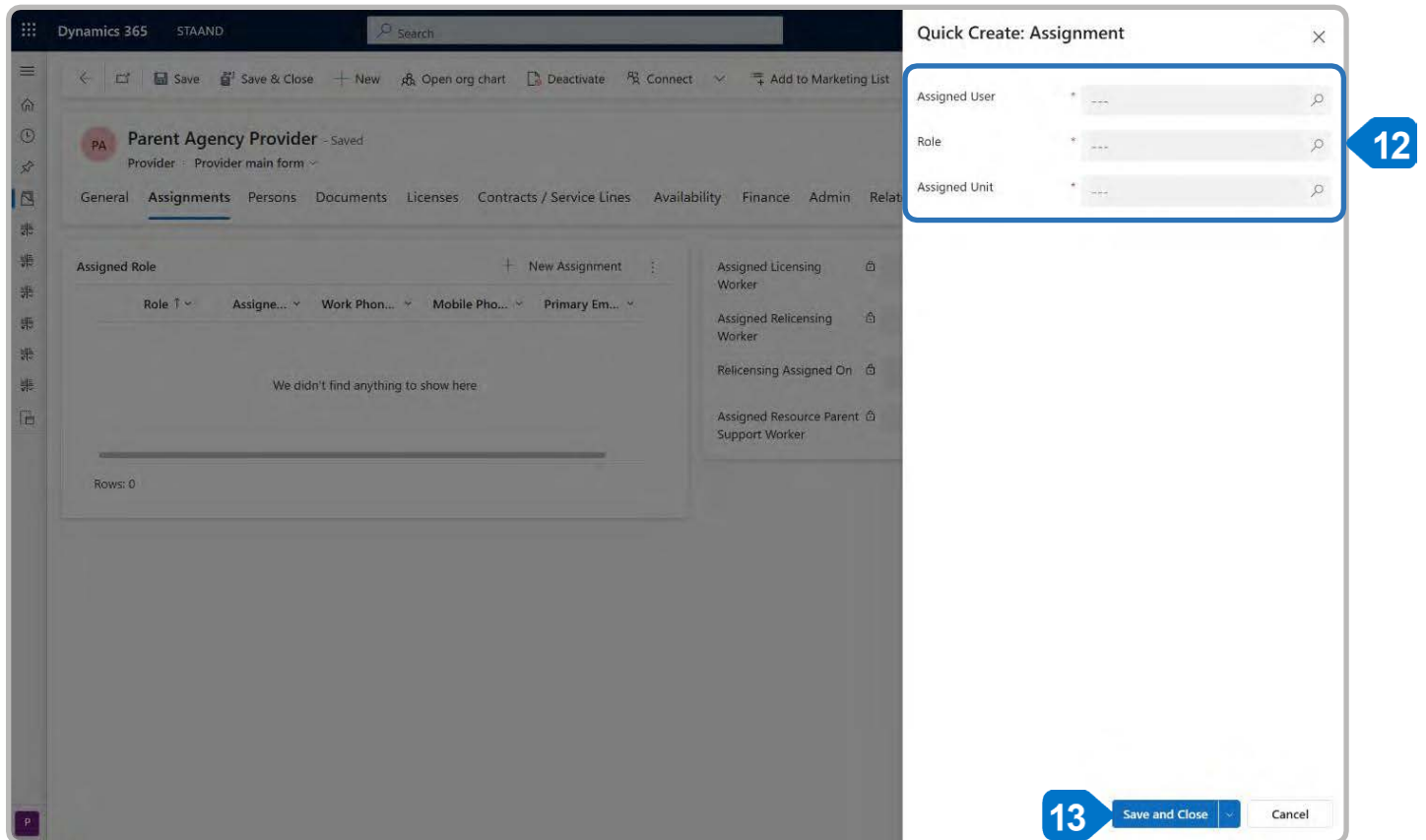
Section	Field	Value	
Provider Information	Provider Name	Parent Agency Provider	
	Provider ID	P-0100000276	
	Provider Type	CFSA	
	Provider Category	Contracted	
	Provider Class	Service Provider	
	Is Agency	Yes	
	Agency/Facility Name	---	
	Is Facility	No	
Availability	Available	No	
	Provider Status	---	
	Unavailability Reason	---	
	Total Provider Capacity	0	
Last updated:		5/15/2025 4:58 PM	
Children in Placement	---		
Current Availability	0		
Contact Information	Primary Contact	Steven Morris	
	Primary Contact Information		
	First Name	Steven	
	Last Name	Morris	
	Home Phone	---	
	Cell Phone	---	
	Primary Email	Steven.Morris.msft@dc...	
Secondary Contact	---		

11. Select + New Assignment to create a new assignment role.

The screenshot shows the Dynamics 365 interface for a 'Parent Agency Provider' record. The 'Assignments' tab is selected, and a blue callout box with the number '11' points to the '+ New Assignment' button. The record details are as follows:

Section	Field	Value	
Assigned Role	Role	---	
	Assignee	---	
	Work Phone	---	
	Mobile Phone	---	
	Primary Email	---	
	We didn't find anything to show here		
	Rows: 0		
	+ New Assignment		
Assigned Licensing Worker	Assigned Licensing Worker	---	
	Assigned Relicensing Worker	---	
	Relicensing Assigned On	---	
	Assigned Resource Parent Support Worker	---	

12. Complete all fields within the Quick Create: Assignment window.
13. Select Save and Close.

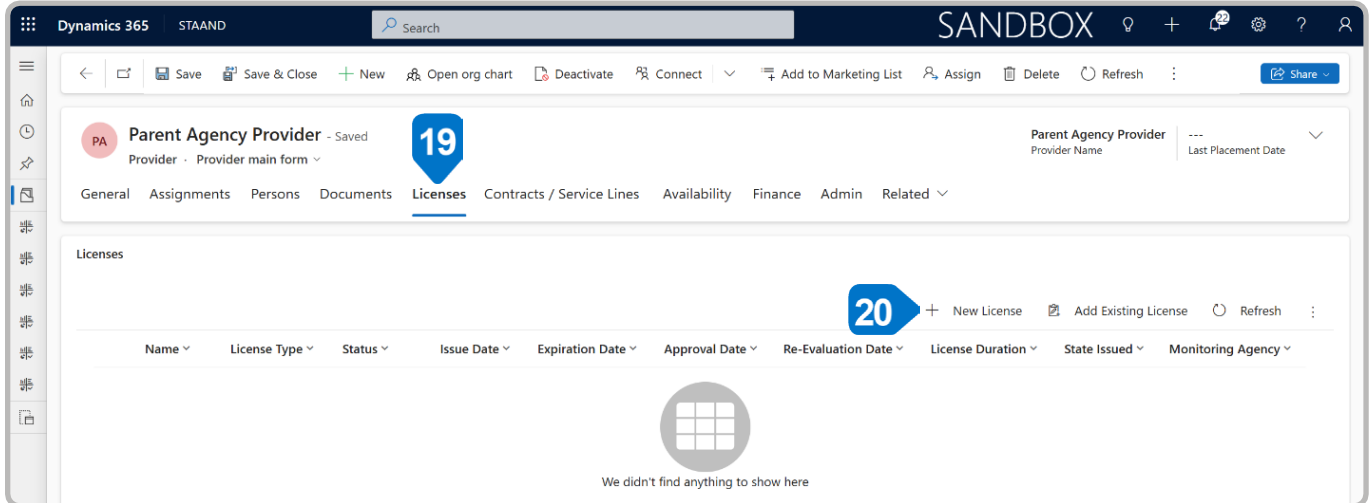


Important Tip:

User can create multiple assignments by repeating steps 9-13.

14. To add information on Agency Provider's license, select the Licenses tab.

15. Select +New License.

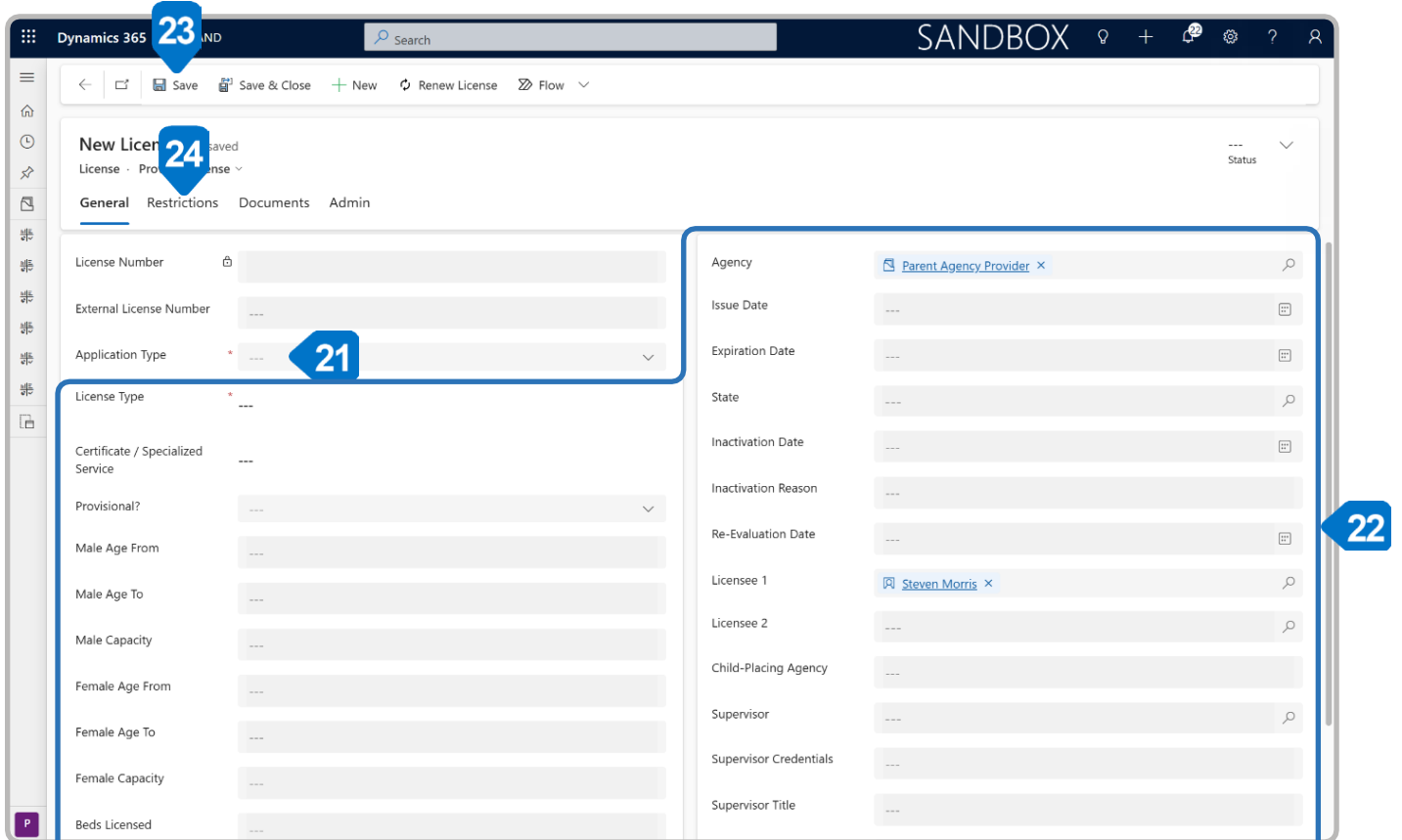


16. Select fields as applicable.

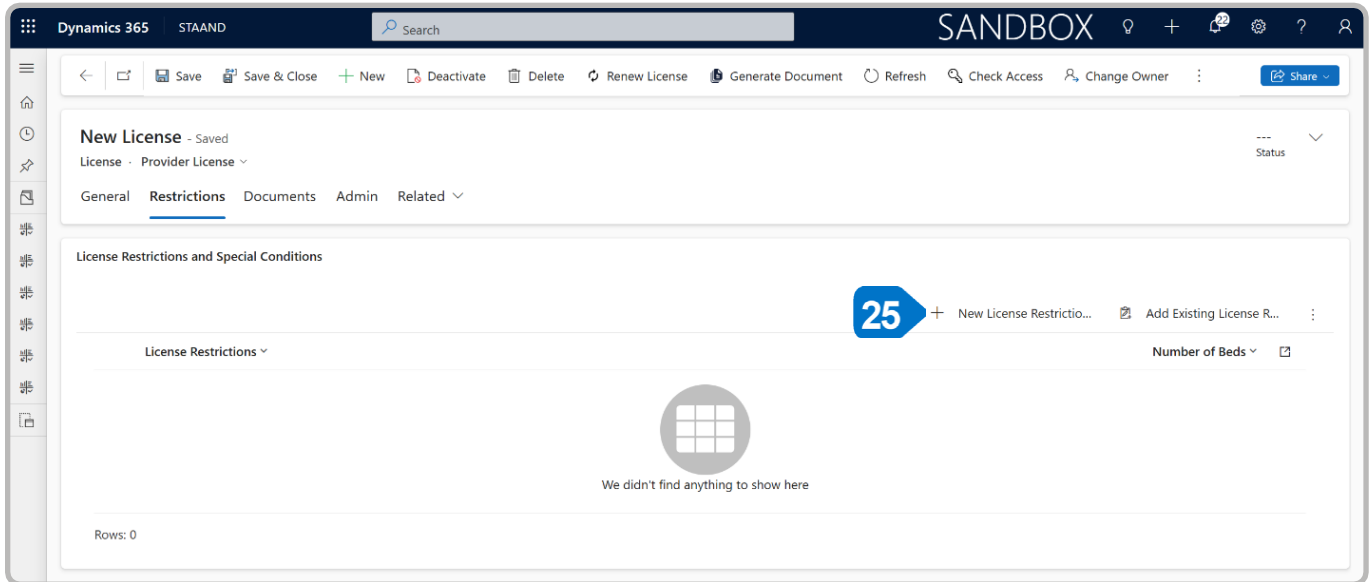
17. Complete all fields.

18. Select Save.

19. If the Agency Provider License has a restriction, select the Restrictions tab.

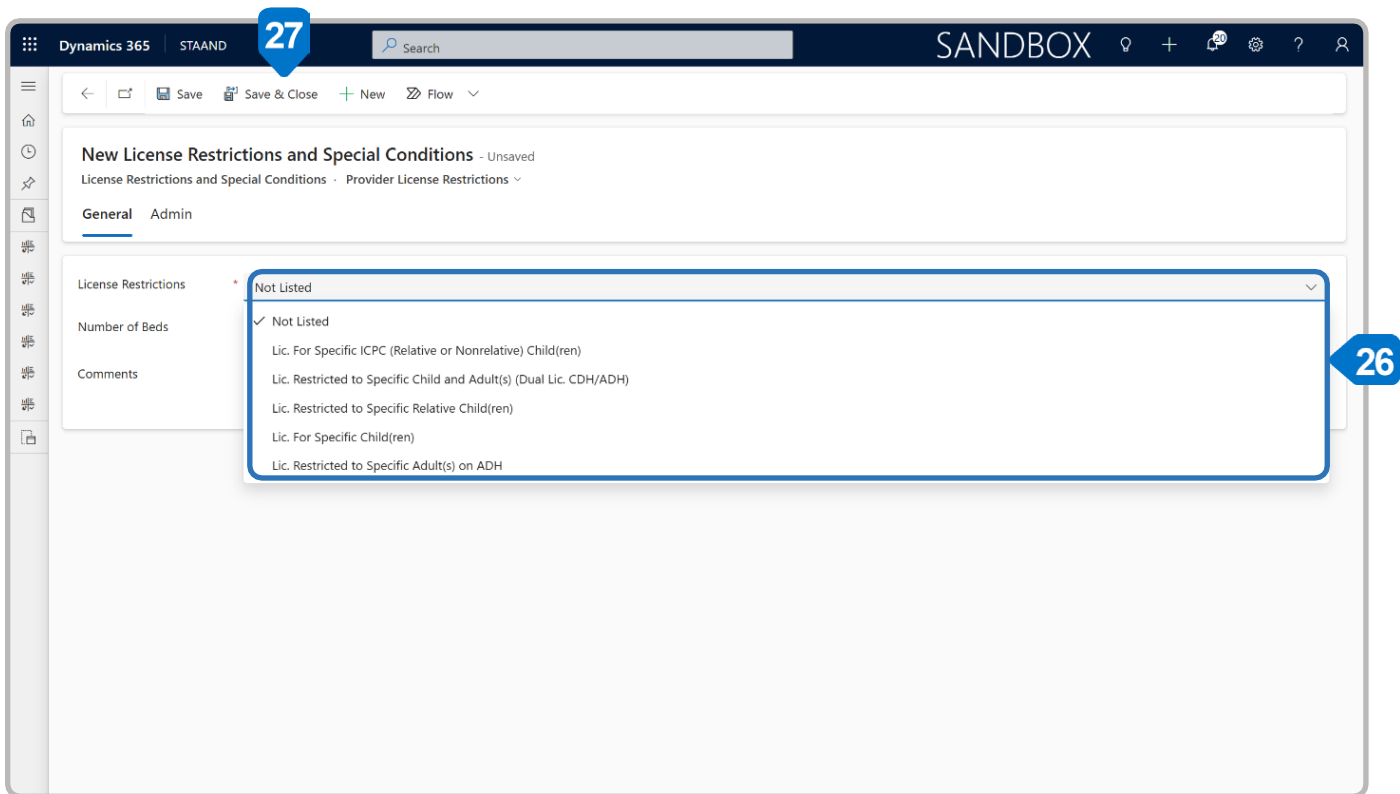


20. Select + New License Restrictions:

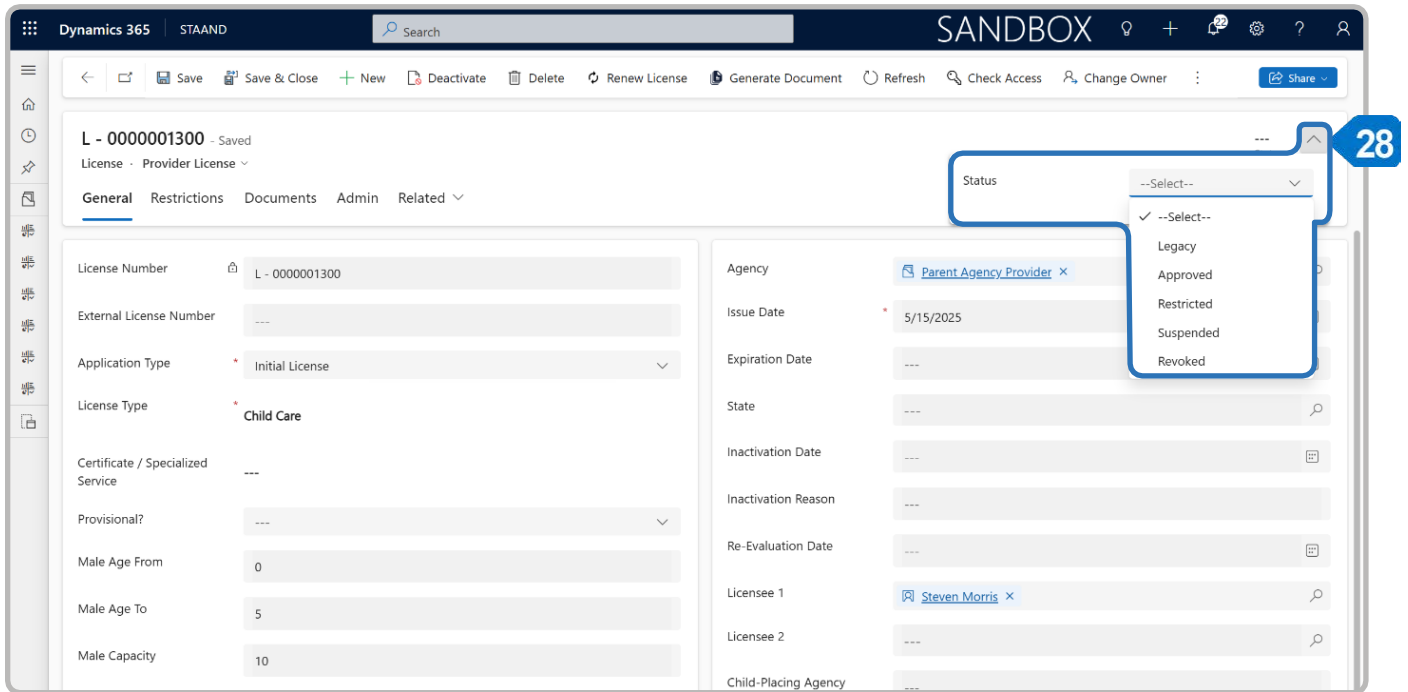


21. Select the License Restrictions from the dropdown menu and complete all necessary information.

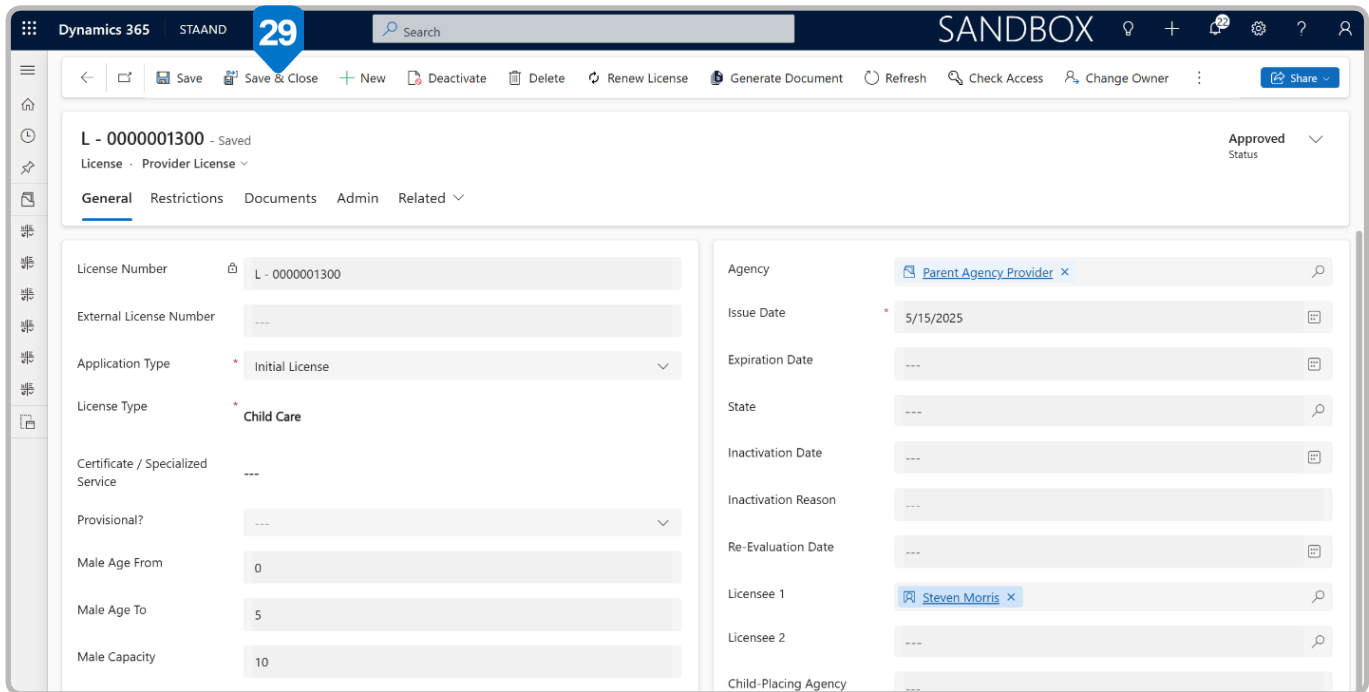
22. Select Save & Close.



23. Select Approved for the Status at the top right-hand corner of the page.

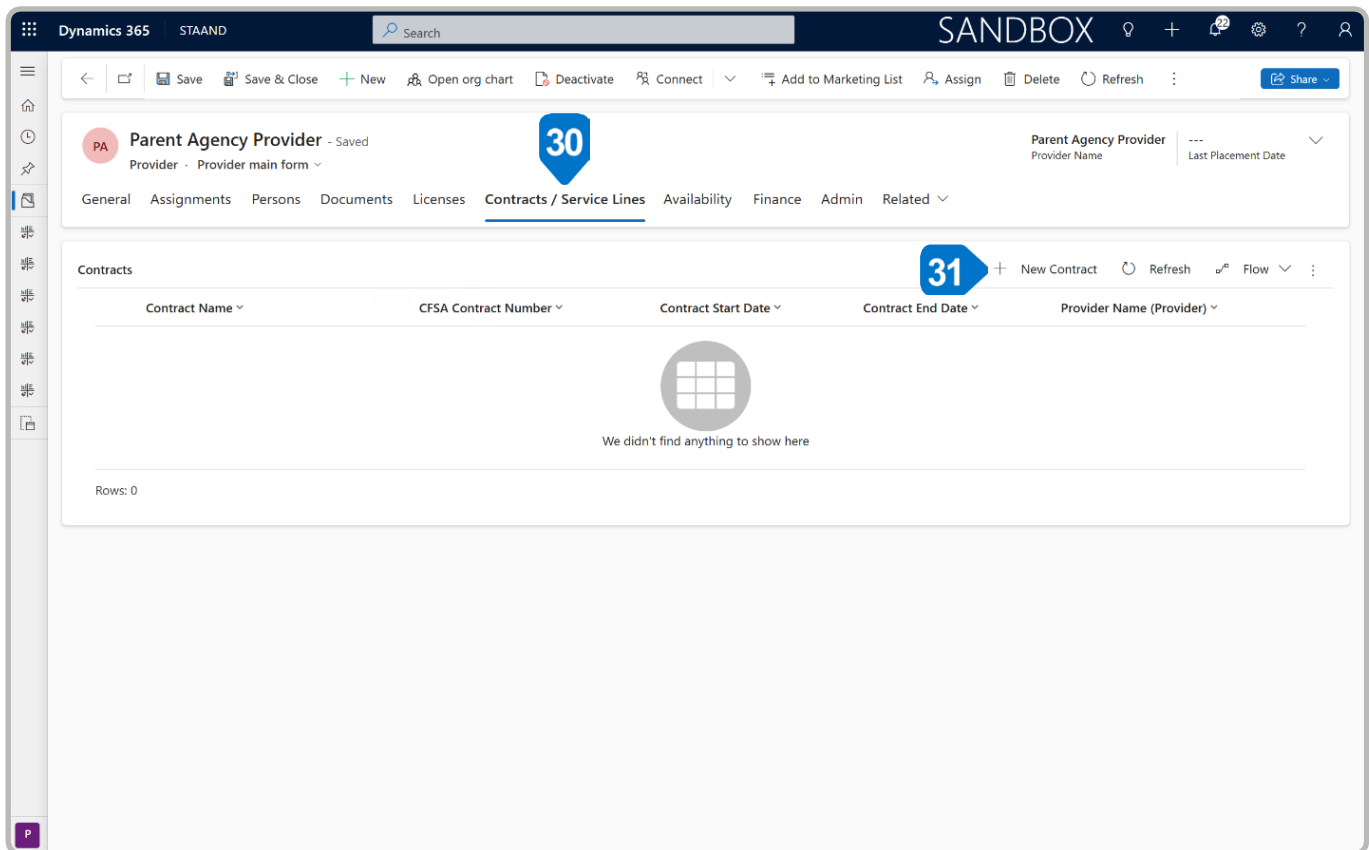


24. Select Save & Close to return to the Provider record.

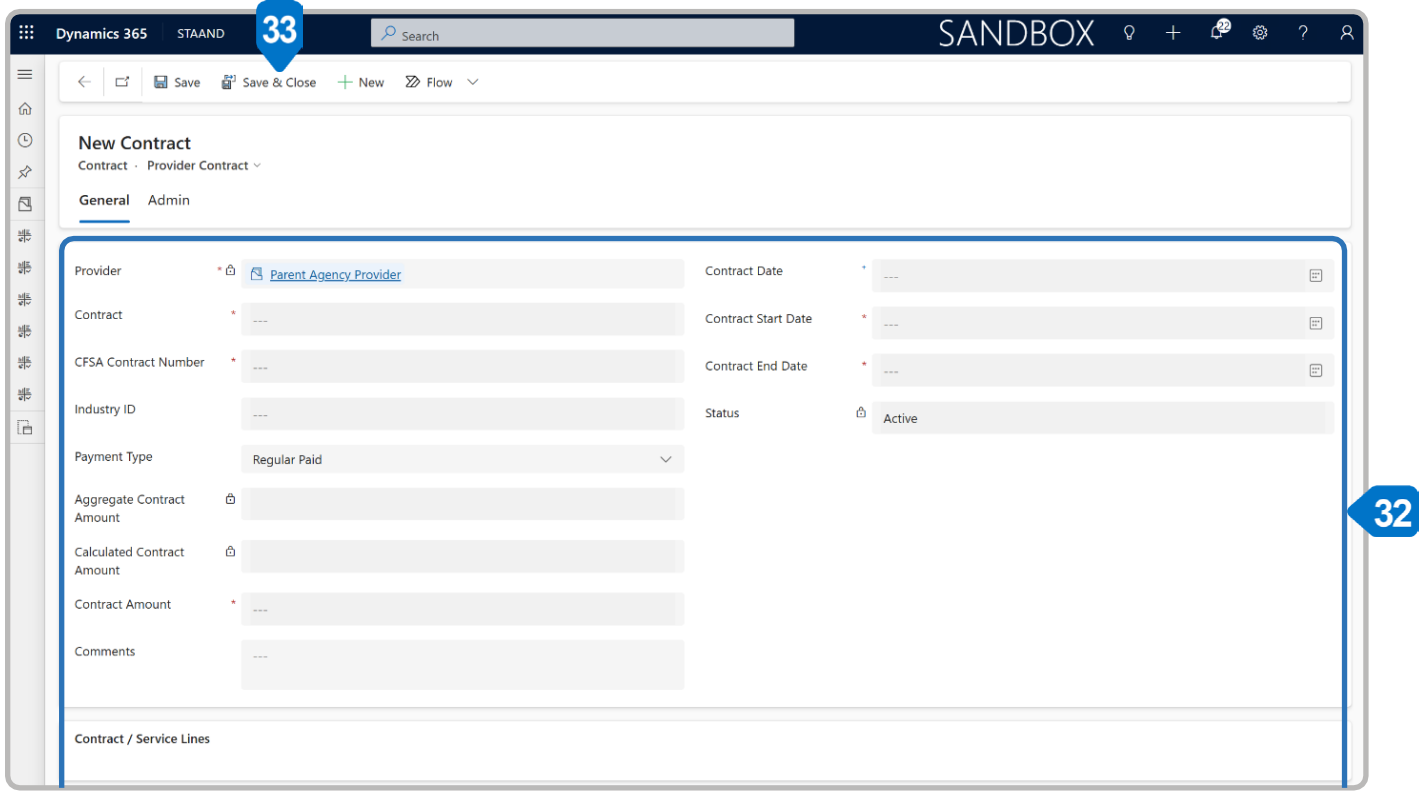


25. To add a Contract to an Agency Provider, select the Contracts/Service Lines tab.

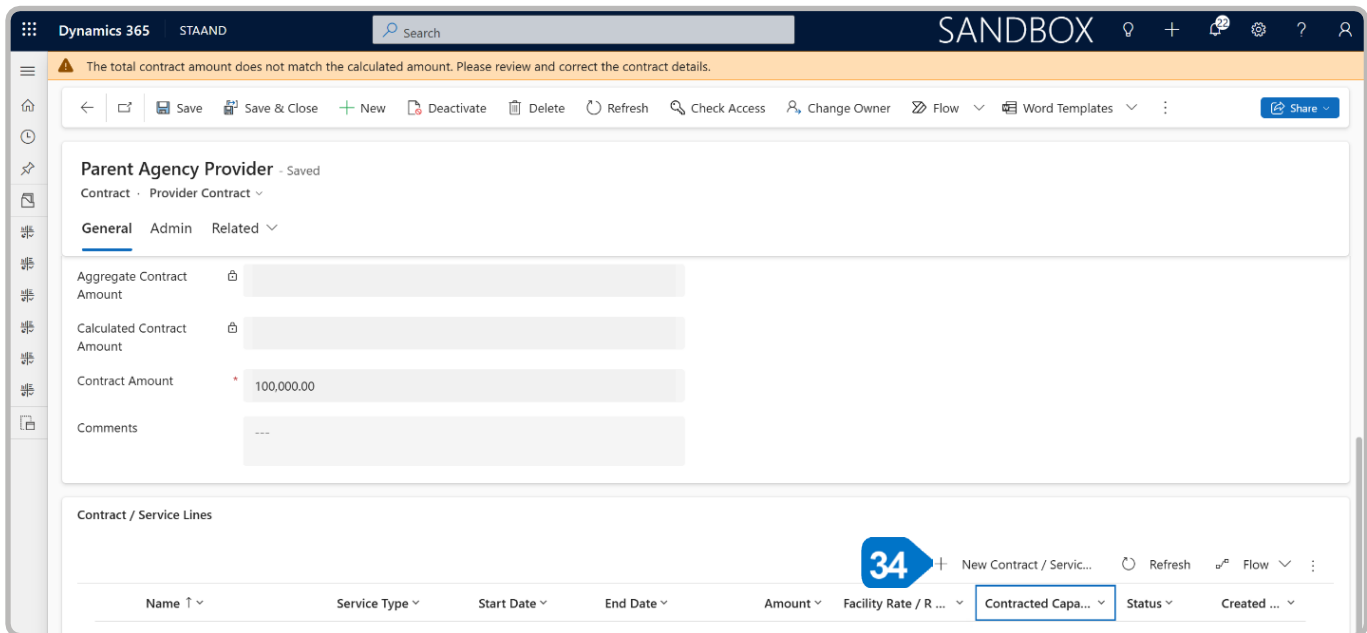
26. Select + New Contract.



27. Complete all fields including Contract, CFSA Contract Number, Contract Amount, Contract Start Date, and Contract End Date.
28. Select Save.



29. Select + New Contract/Service Line.



30. Complete all fields including Service Type, Start Date, End Date, and Amount.

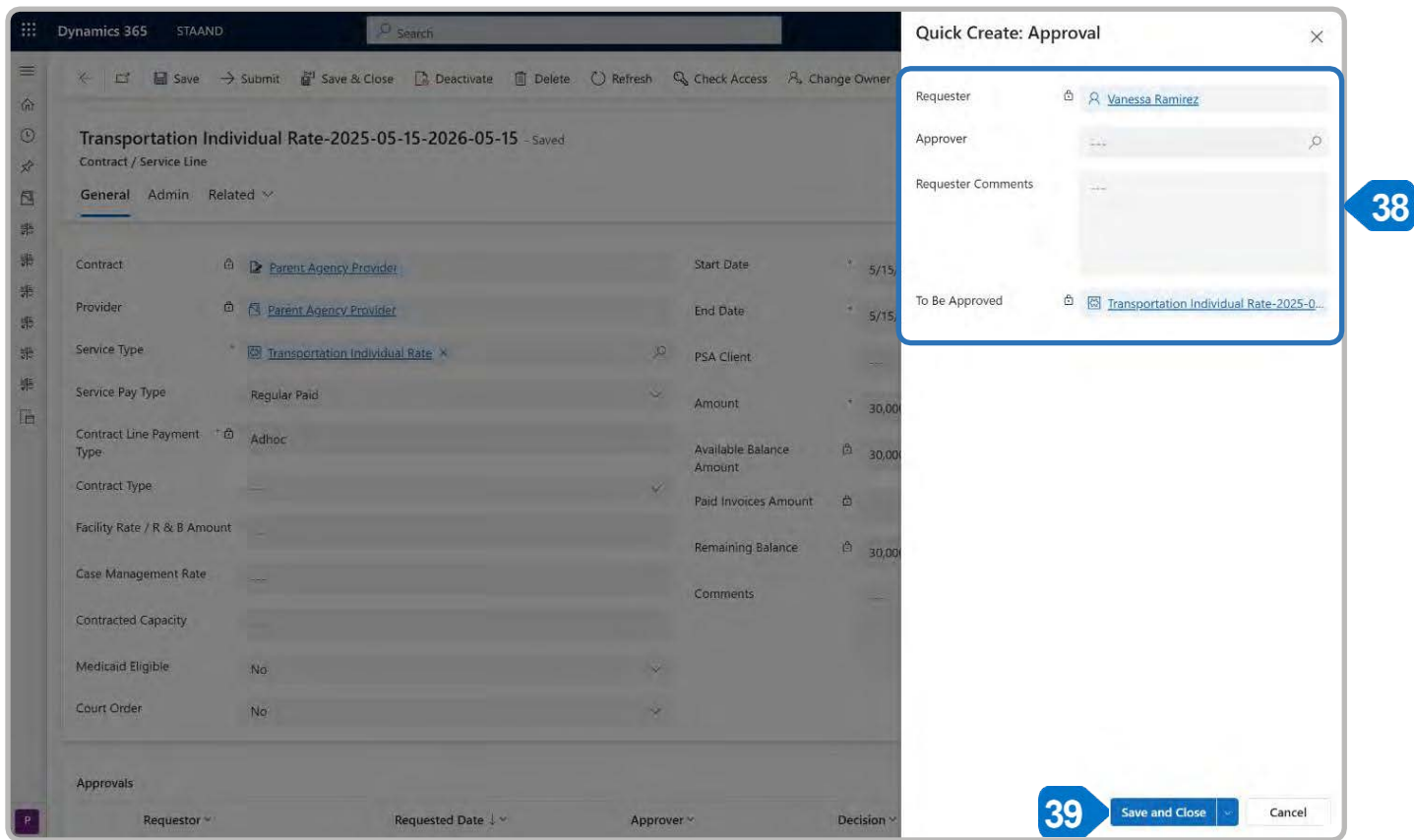
31. Select Save.

35

32. Select Submit to submit the record for approval.

37

- 33. Complete all fields within the Quick Create: Approval window.
- 34. Select Save and Close.



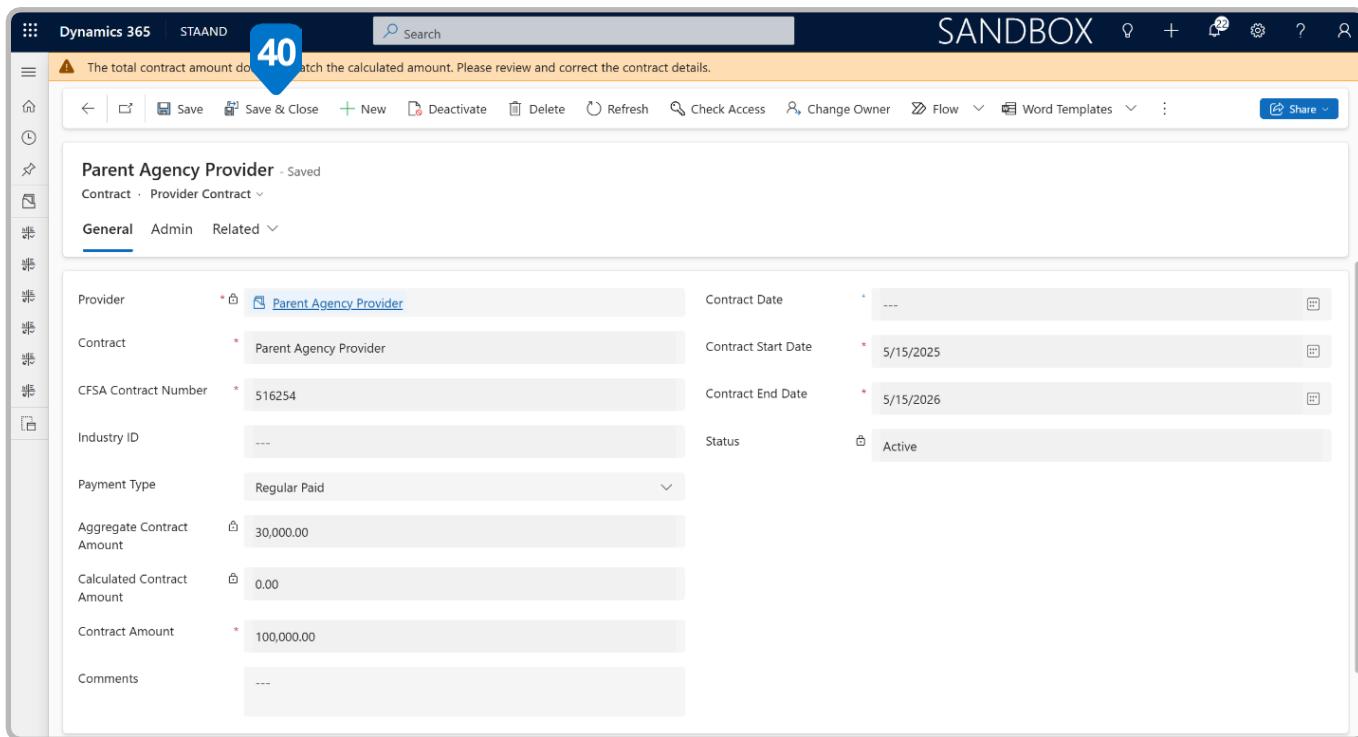
Important Tip:

If more than one service line is needed, the User can follow steps 25-34 until all service lines have been added.

Note:

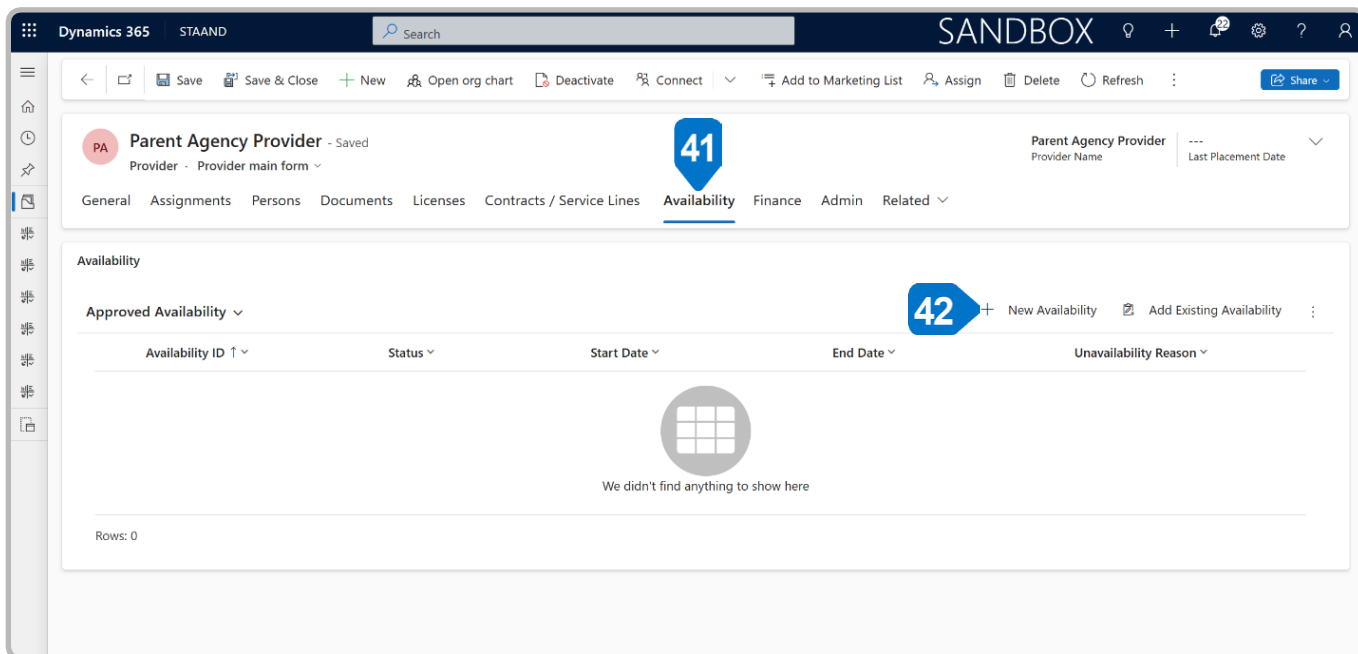
To approve, please refer to [How To: Approve Provider Records](#) on page 61.

35. Select Save & Close to return to the Provider record.



36. To record Provider availability, select the Availability tab.

37. Select + New Availability.



38. Complete all fields including Status and Start Date.

39. Select Save.

The screenshot shows the Dynamics 365 interface for creating a new availability record. The top navigation bar includes 'Dynamics 365', 'STAAND', a search bar, and 'SANDBOX'. The main header shows 'New Availability' and 'Availability · Information'. The 'General' tab is active, displaying the 'General Availability' section. A blue callout box with the number '44' points to the 'Save' button in the top toolbar. Another blue callout box with the number '43' points to the 'Unavailability Reason' field. The form fields are as follows:

Field	Value
Status	Available
Start Date	---
End Date	---
Duration (In Days)	---
Provider	Parent Agency Provider
Unavailability Reason	---
Approved?	<input type="radio"/> No
Created On Portal?	<input type="radio"/> No

Note:

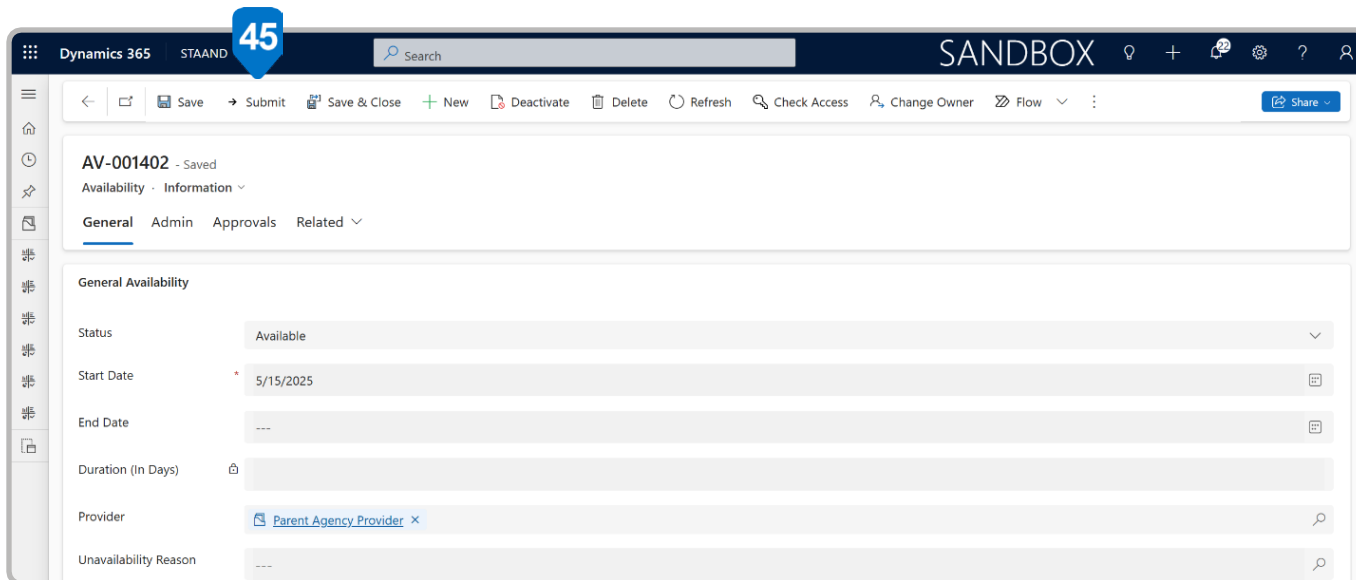
If an End Date is selected, the User will need to select an Unavailability Reason from the dropdown menu.

The screenshot shows the Dynamics 365 interface for creating a new availability record. The top navigation bar includes 'Dynamics 365', 'STAAND', a search bar, and 'SANDBOX'. The main header shows 'New Availability - Unsaved' and 'Availability · Information'. The 'General' tab is active, displaying the 'General Availability' section. A green callout box highlights the 'Unavailability Reason' dropdown menu, which is open and showing the following options:

- Closed
- Corrective Action Plan
- Full/Unavailable
- License Revoked/Closed
- Other
- + New Master Data

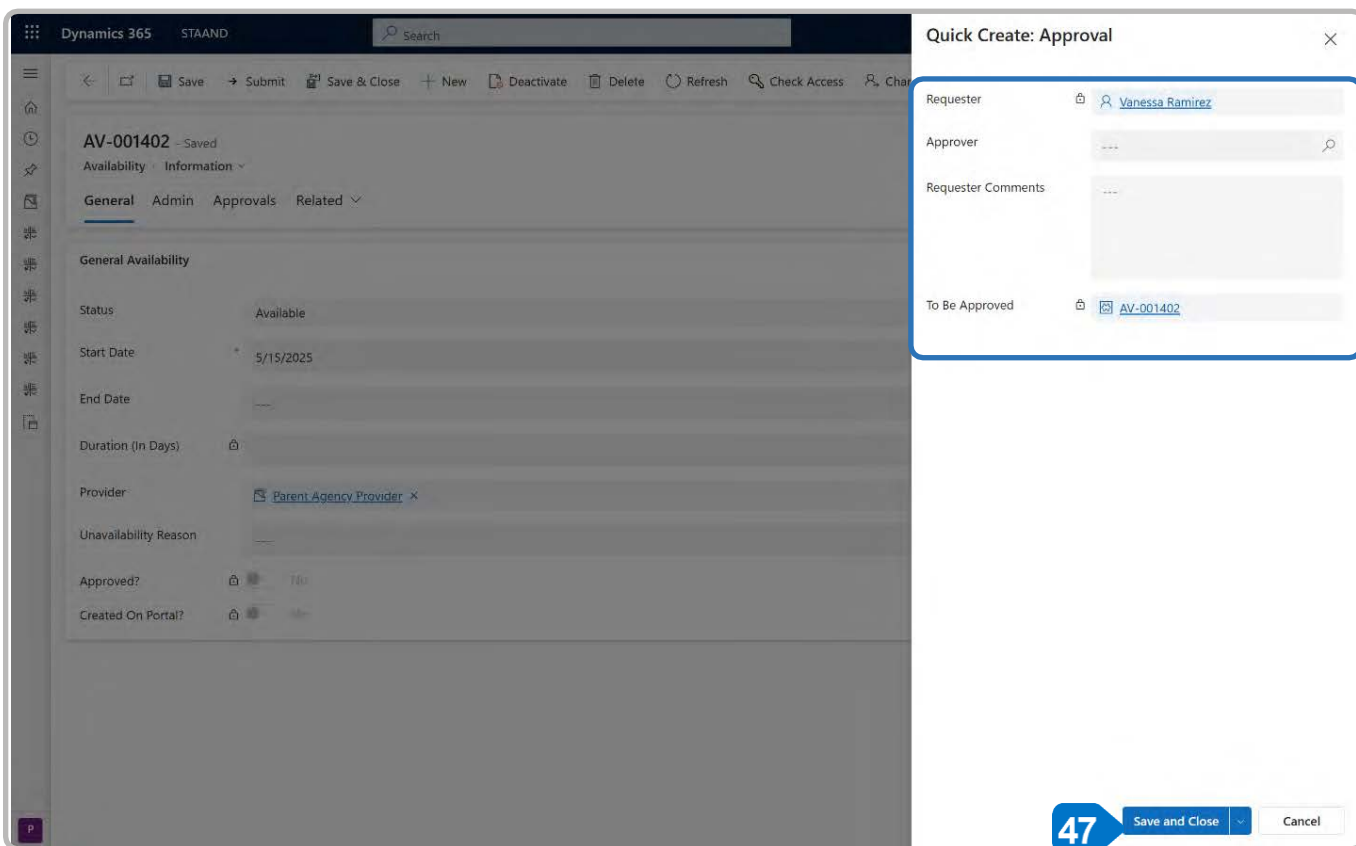
The dropdown menu also includes a search bar with the text 'Look for Unavailability Reason' and an 'Advanced lookup' link.

40. Select Submit to submit for approval.



41. Complete all fields within the Quick Create: Approval window.

42. Select Save and Close.



43. Once the Provider availability is approved, it will populate in the Approvals subgrid.

AV-001402 - Saved
Availability - Information

General Admin **Approvals** Related

Requestor	Requested Date	Approver	Decision	Decision Date
Vanessa Ramirez	5/15/2025 12:33 PM	Vanessa Ramirez	Approved	5/15/2025 5:34 PM

Rows: 1

44. To view or generate Provider invoices, select the Finance tab.

45. Any Invoices related to the Provider will populate in the Finance tab.

Parent Agency Provider - Saved
Provider - Provider main form

General Assignments Persons Documents Licenses Contracts / Service Lines Availability **Finance** Admin Related

Episodic Service Logs

We didn't find anything to show here

Rows: 0

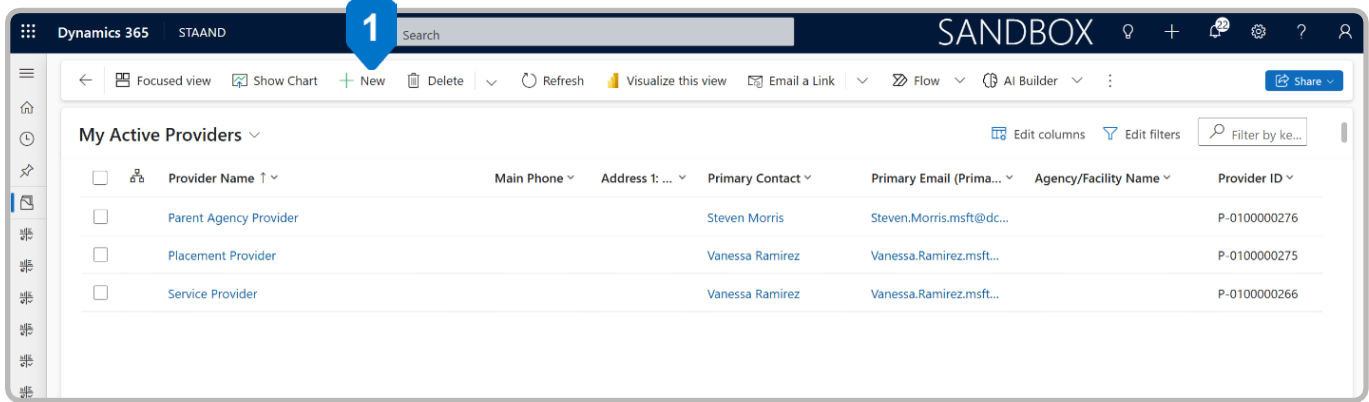
Invoices

We didn't find anything to show here

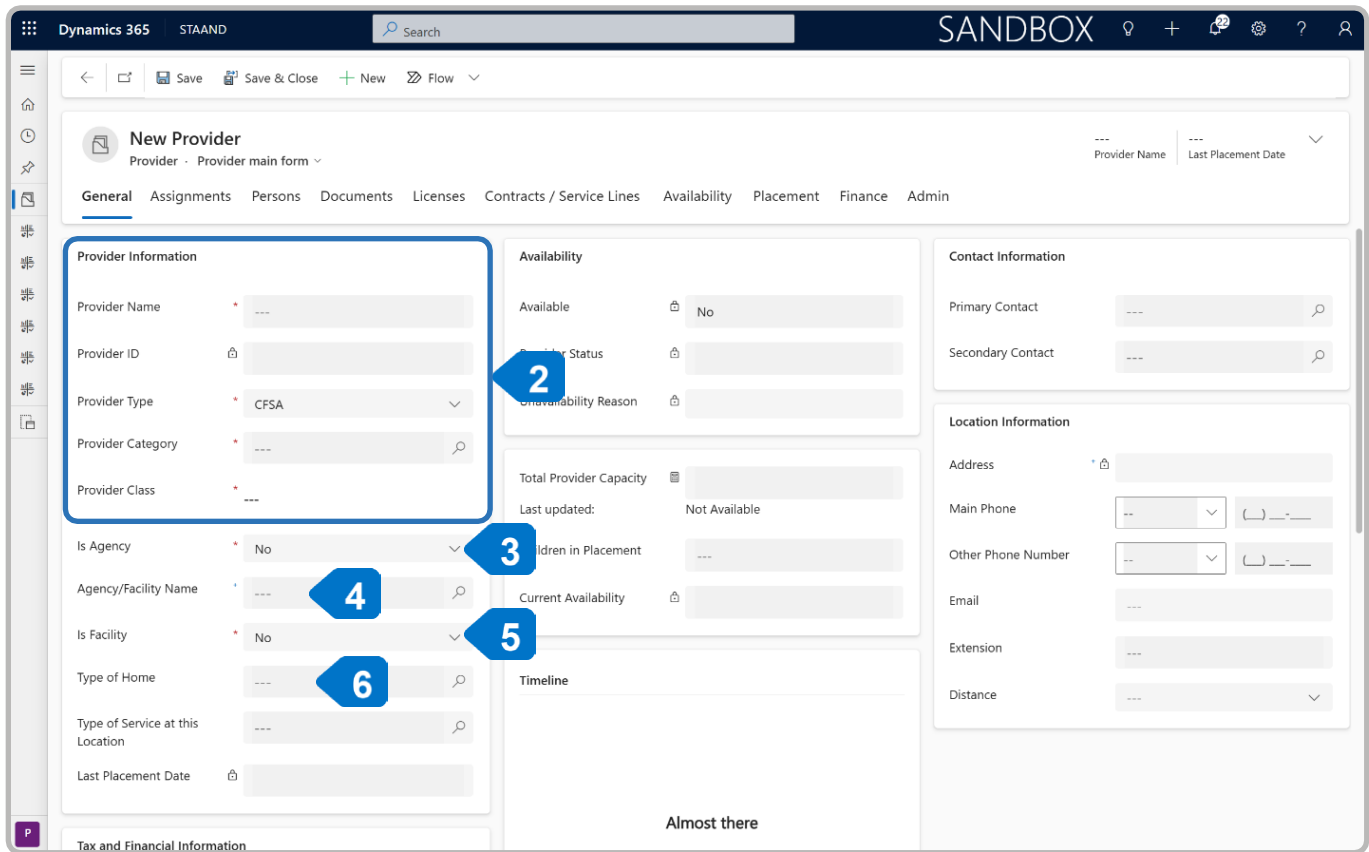
Rows: 0

How To: Link a Facility to a Parent Agency

1. From the Provider work area, select + New from the Action Toolbar.



2. Complete all fields including Provider Name, Provider Category, and Provider Class.
3. Select Yes in the "Is Agency?" field.
4. Select the Look up icon to select Agency/Facility Name field.
5. Select Yes in the "Is Facility?" field
6. Select Type of Home, if applicable.



7. Select Save. The Facility Provider is now linked to the Parent Agency Provider.

Facility Provider - Saved

Provider - Provider main form

Facility Provider
Provider Name | Last Placement Date

General | Assignments | Persons | Documents | Licenses | Contracts / Service Lines | Availability | Placement | Finance | Admin | Related

Provider Information

Provider Name * Facility Provider

Provider ID P-010000277

Provider Type * CFSA

Provider Category * Non-Contracted

Provider Class * Placement Provider, Service Provider

Is Agency * Yes

Agency/Facility Name * Parent Agency Provider

Is Facility * Yes

Type of Home * Congregate Care

Type of Service at this Location

Last Placement Date

Availability

Available No

Provider Status

Unavailability Reason

Total Provider Capacity 0

Last updated: 5/15/2025 12:43 PM

Children in Placement

Current Availability 0

Contact Information

Primary Contact

Secondary Contact

Location Information

Address

Select all

No data available

Timeline

Search timeline

Enter a note...

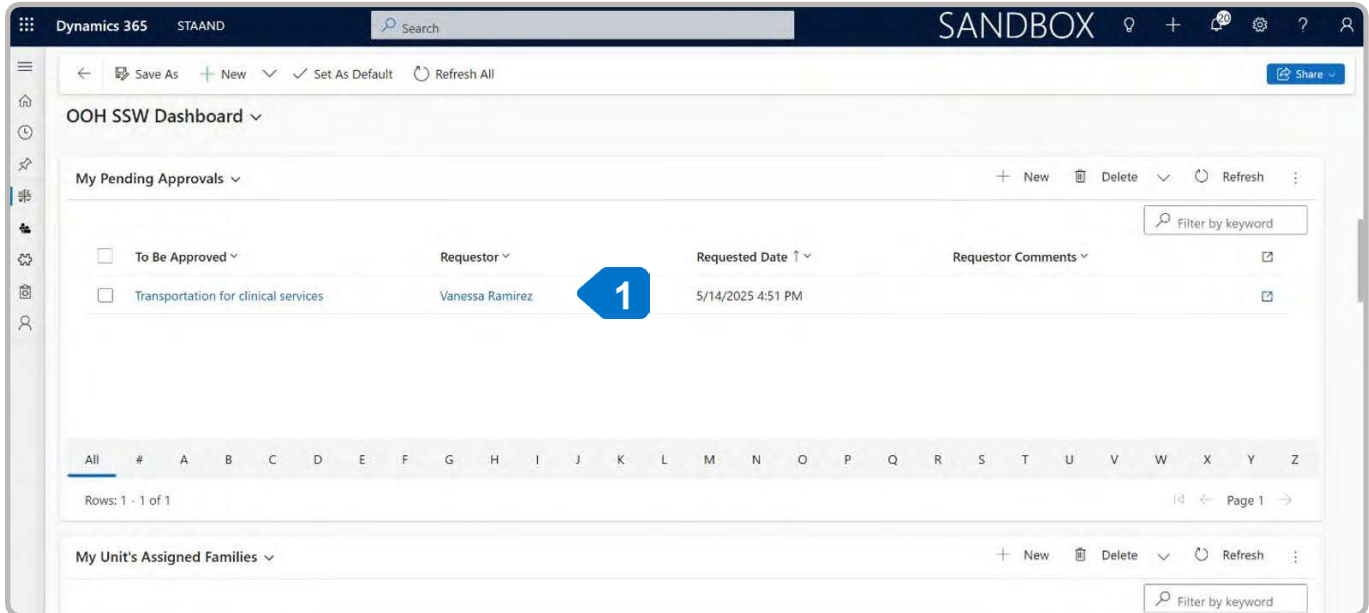
Tax and Financial Information

Approving Provider Records

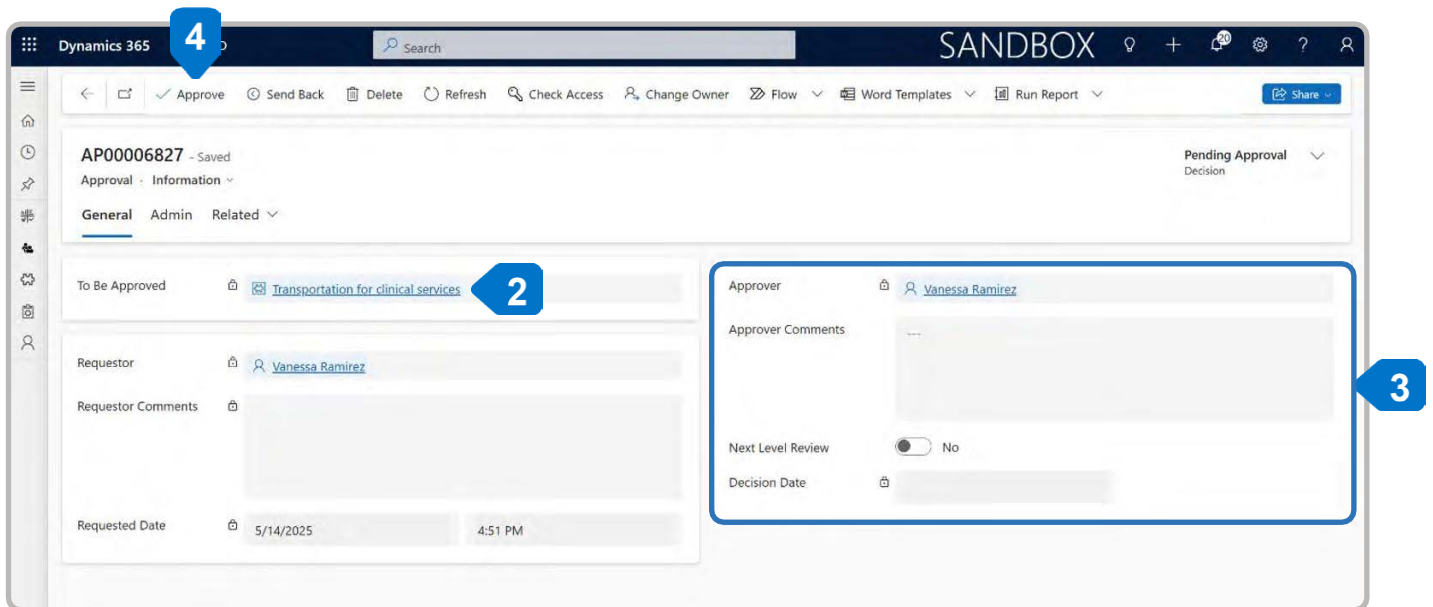


How To: Approve Provider Records

1. Navigate to the Supervisor dashboard and select the Provider needing an approval.



2. Select the hyperlink in the To Be Approved to review the record.
3. Add any Approver Comments if necessary.
4. Select Approve from the Action Toolbar.



Checking Provider Availability



How To: Check Provider Availability

The availability of the provider is in two areas of STAAND; under the General and Availability tabs of the Provider record.

General Tab

The screenshot shows the 'General' tab of a provider record for 'Mary Banks'. The 'Availability' section is highlighted with a red box and contains the following information:

Available	No
Provider Status	Unavailable
Unavailability Reason	Closed
Total Provider Capacity	400
Last updated	12/31/2025 2:47 PM
Children in Placement	41

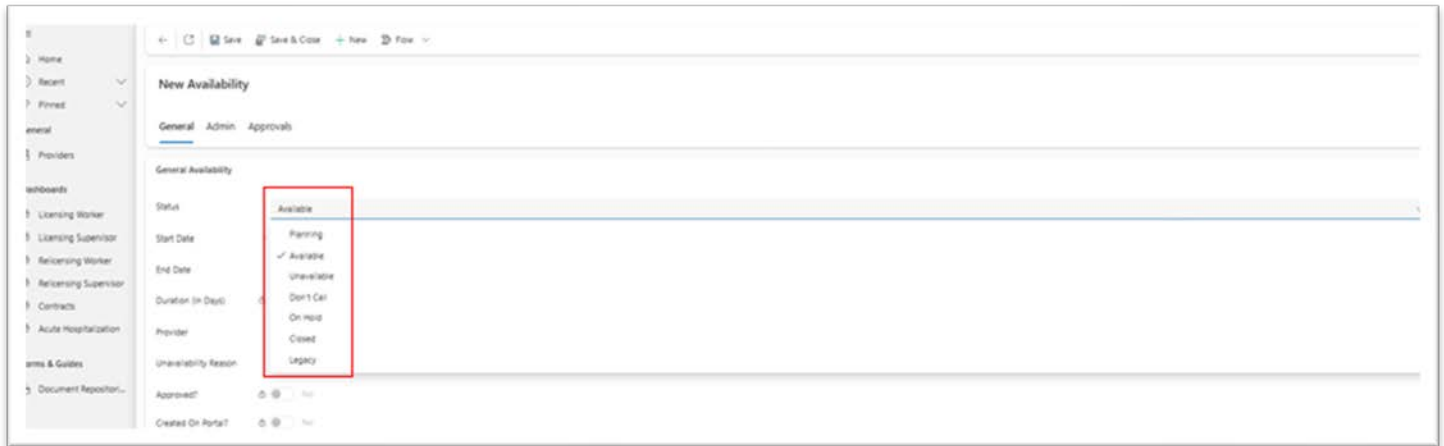
Availability Tab

1. This Availability tab reveals the Availability ID, Status of the provider and the Start and End dates and the Unavailability Reason.

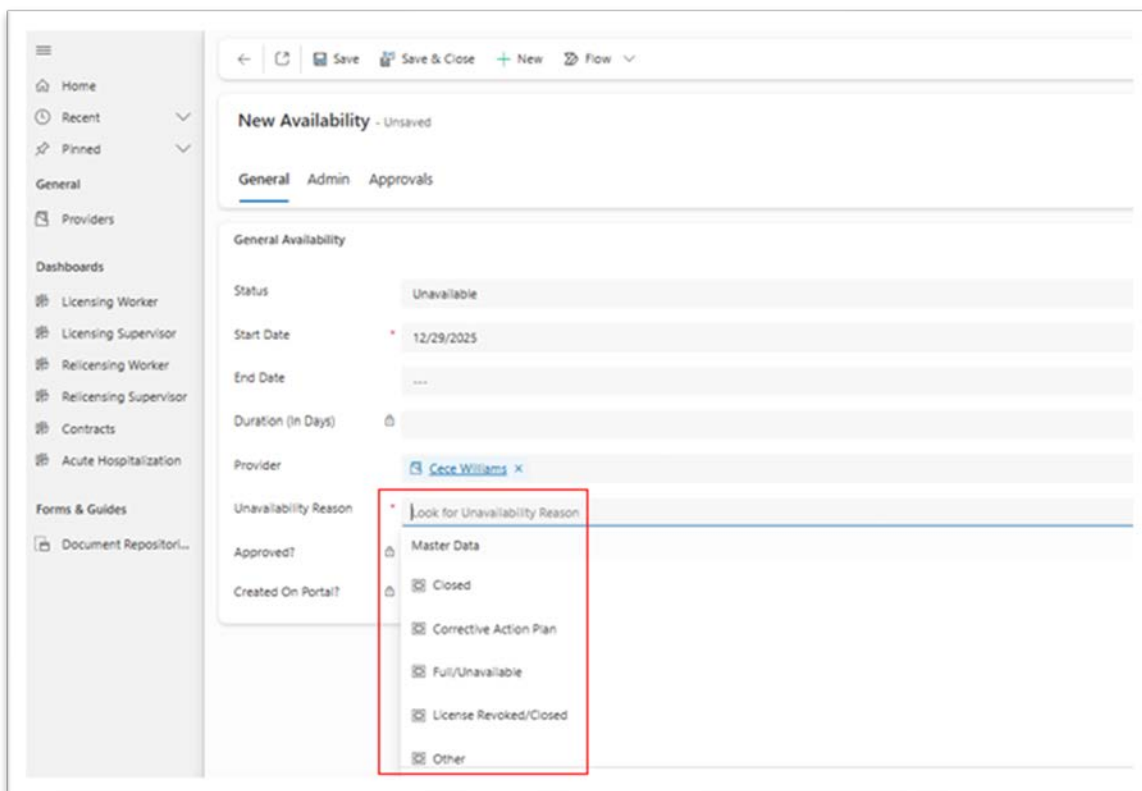
The screenshot shows the 'Availability' tab of a provider record for 'Cece Williams'. The 'Availability' section is highlighted with a red box and contains the following table:

Availability ID	Status	Start Date	End Date	Unavailability Reason
AV-001022	Available	3/27/2025	3/26/2025	

2. The Provider availability information can be changed/updated by clicking on +New Availability.
3. Change/update the status from availability to one of the options in the dropdown list.



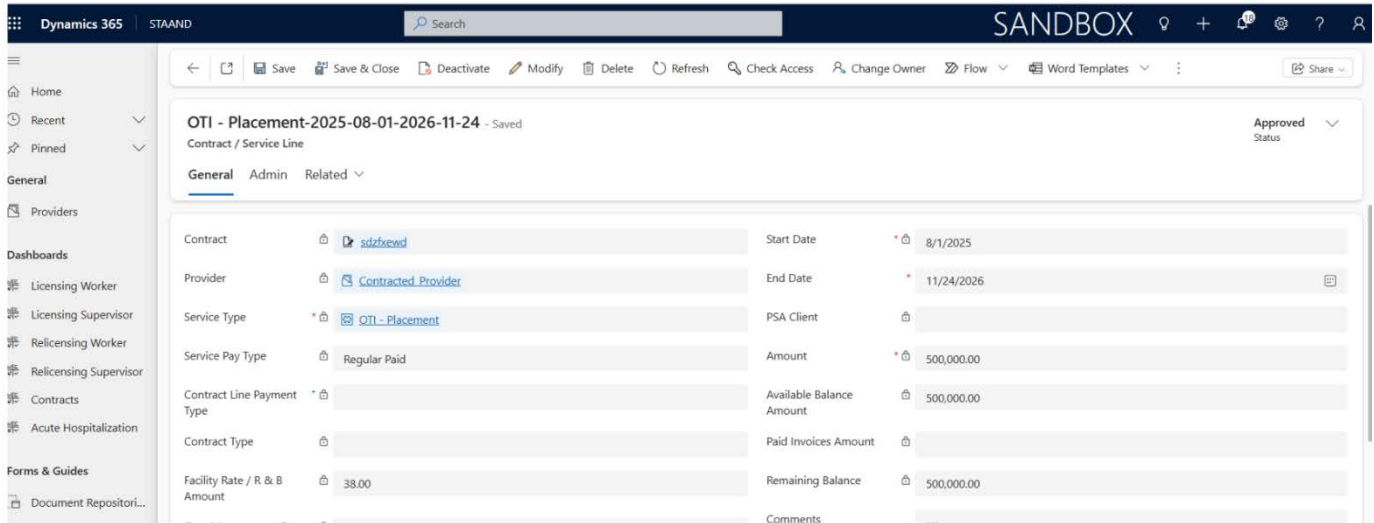
4. Enter the Start Date (required field) and End Date (if available).
5. Select the Unavailability Reason from the dropdown options. If Other is selected, type the reason in the narrative box.



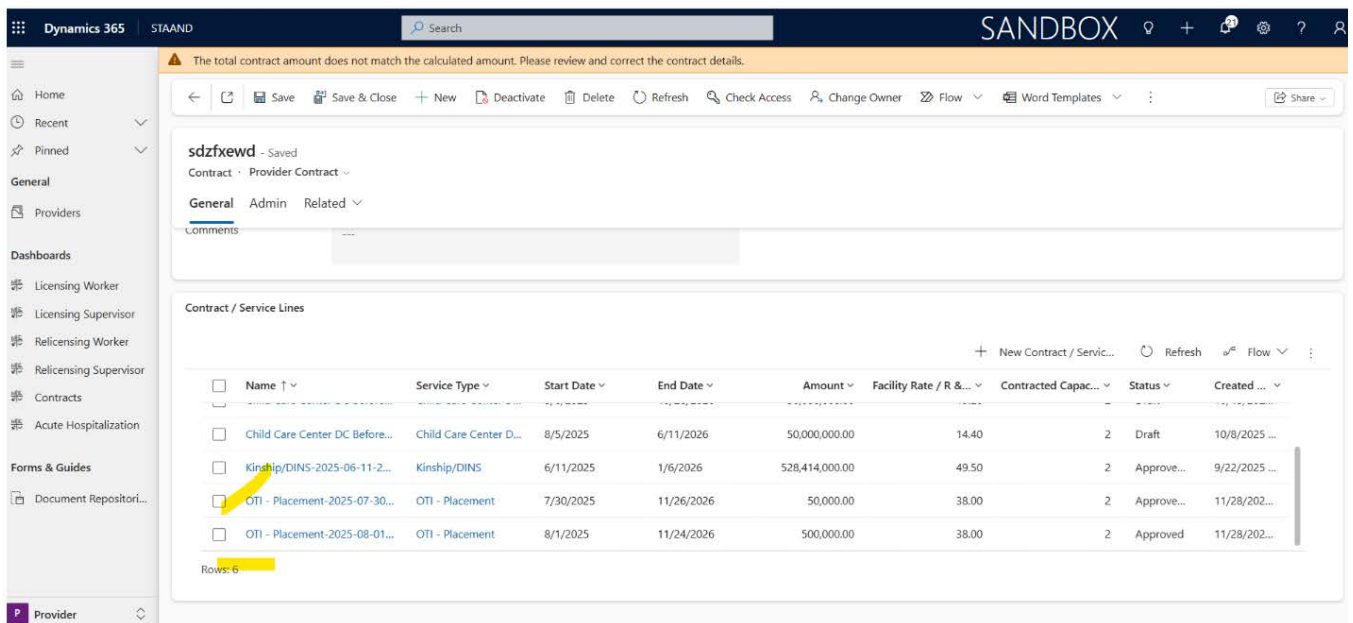
6. Save and Close.

How To: Transfer Service Logs and Provider Assignments

1. Open the Provider record.
2. Navigate to the Contract/ Service line.



3. Create Service Line with Provider Contract Line And Service Log.



4. Create another service line with same service type with existing record with mid dates.

The screenshot shows the Dynamics 365 interface for a record titled "OTI - Placement-2025-07-30-2026-11-26 - Saved". The record is of type "Contract / Service Line" and is "Approved by Supervisor". The "Contract Lines" tab is active, displaying a table titled "Provider Contract Line Associated View".

Parent Provider	Provider	Contract / Service Line	Start Date	End Date
GK Non Contracted	Contracted_Provider	OTI - Placement-2025-07-30-2026-11-26	7/30/2025	11/26/2026

Rows: 1

5. Verify the created Service Line is Supervisor approved the records Service Log and Provider Contract Line should copy to the new records.

The screenshot shows the Dynamics 365 interface for the same record, now viewed under the "Service Logs" tab. The "Service Log Entry Associated View" table displays two entries, with a yellow highlight under the first row.

Parent Service ...	Entry ID	Child	Entry Ty...	Service Type	Contract/Service L...	Provider	Start Date	End Date	Status R...	Created On
	SL-00002484	Karthick AK	Placem...	OTI - Placement	OTI - Placement-20...	Contracted_Provi...	8/1/2025		Confir...	11/28/2025
SL-00002484	SL-00002486	Karthick AK	Placem...	OTI - Placement	OTI - Placement-20...	Contracted_Provi...	7/30/2025		Confir...	11/28/2025

Rows: 2

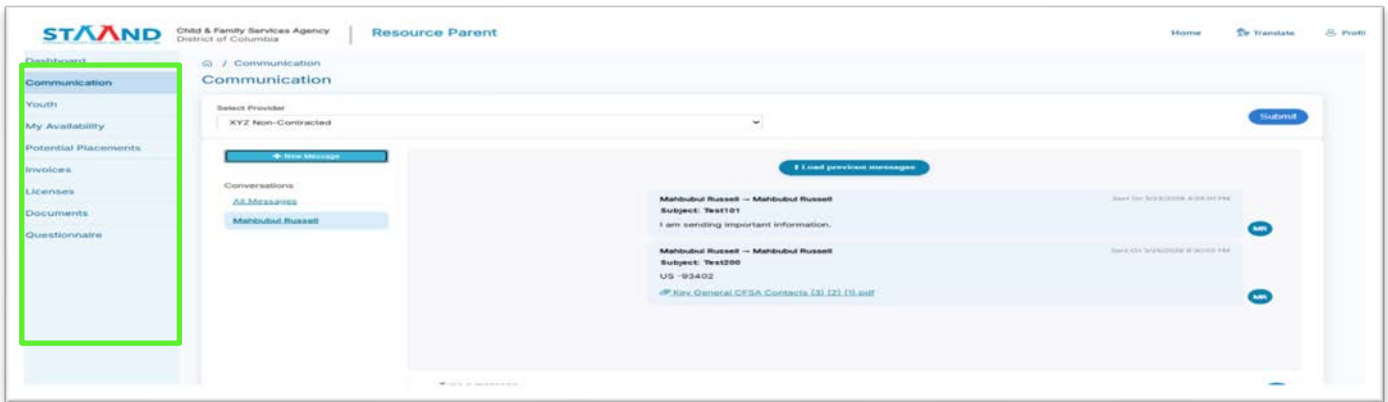
Portal Communications



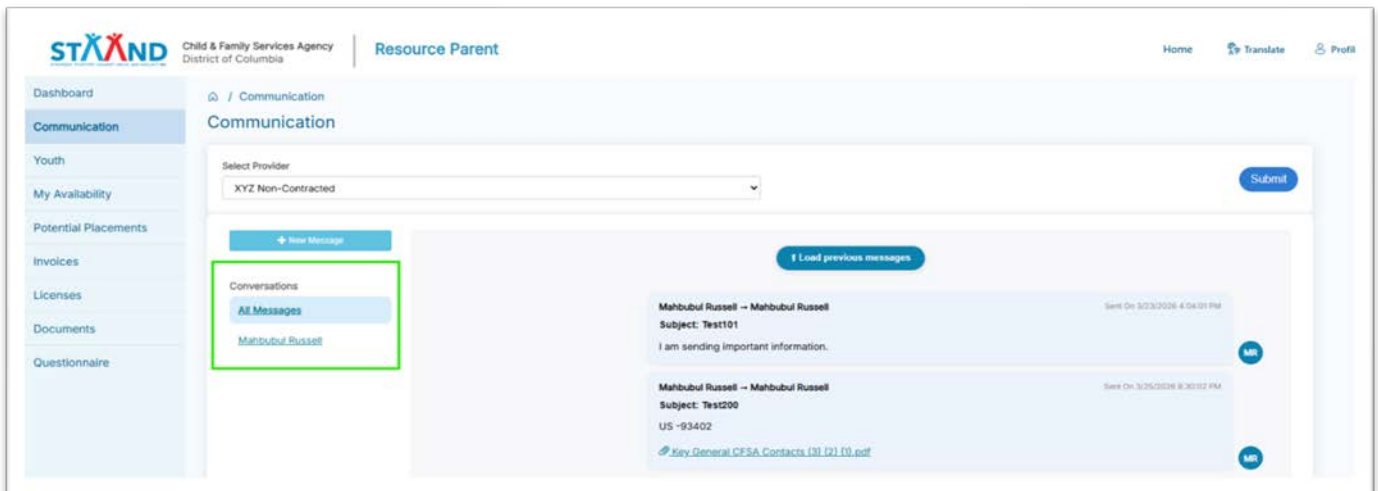
Portal Communications

As a Resource Parent or Provider, you can use the portal's messaging feature to communicate more easily and efficiently. This functionality allows you to send, receive, and acknowledge messages directly within the system, helping streamline interactions and reduce the need for support calls. Through the messaging tools, you can select recipients assigned to your provider, attach files, receive both in-app and email notifications, and view organized message history with sorting, filtering, and read/unread indicators.

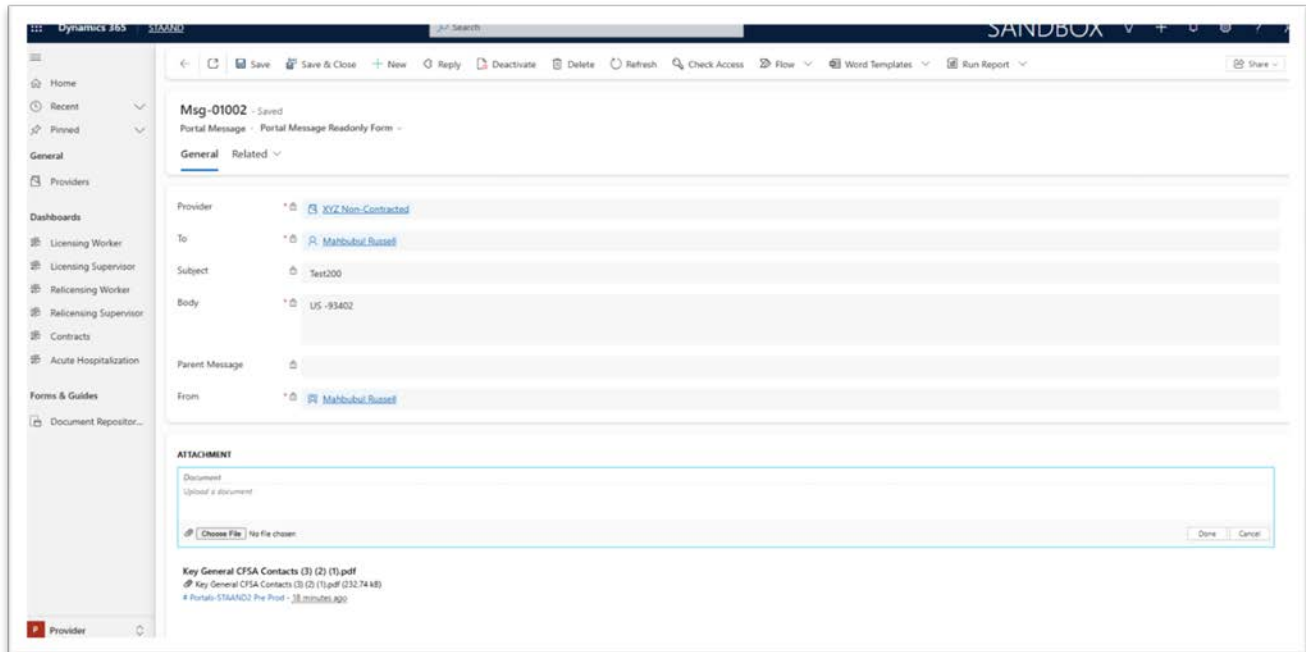
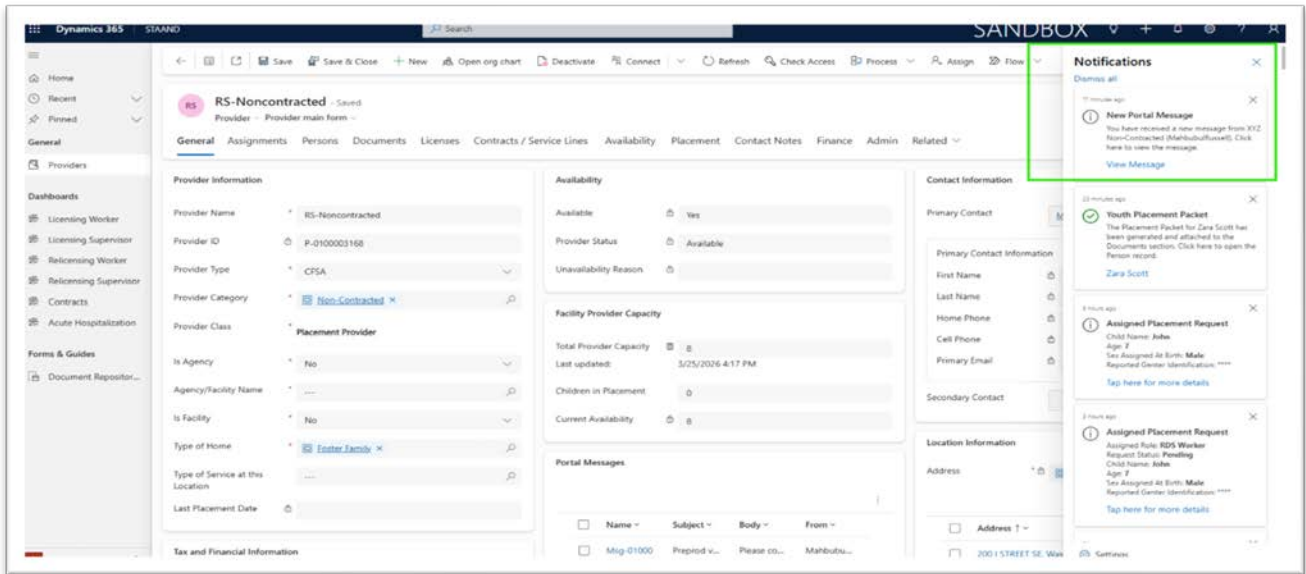
1. Log into Portal as Resource parent.
2. Click on the Communication panel on the left side of the screen.
3. Verify the User can see the list of messages with (Sender, Recipients, Timestamp, Message Body, Attachments (if applicable), An unread indicator for new messages.



4. Messages can be filtered with Read and Unread notification.

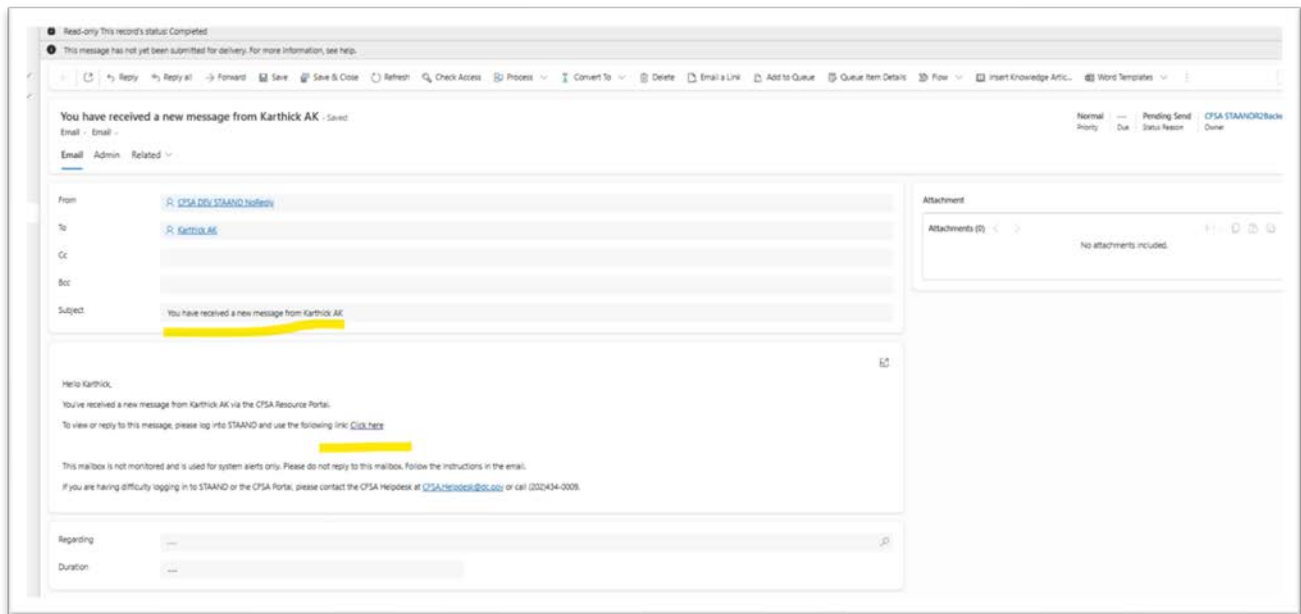


5. The message notification appears on the right side of the screen.

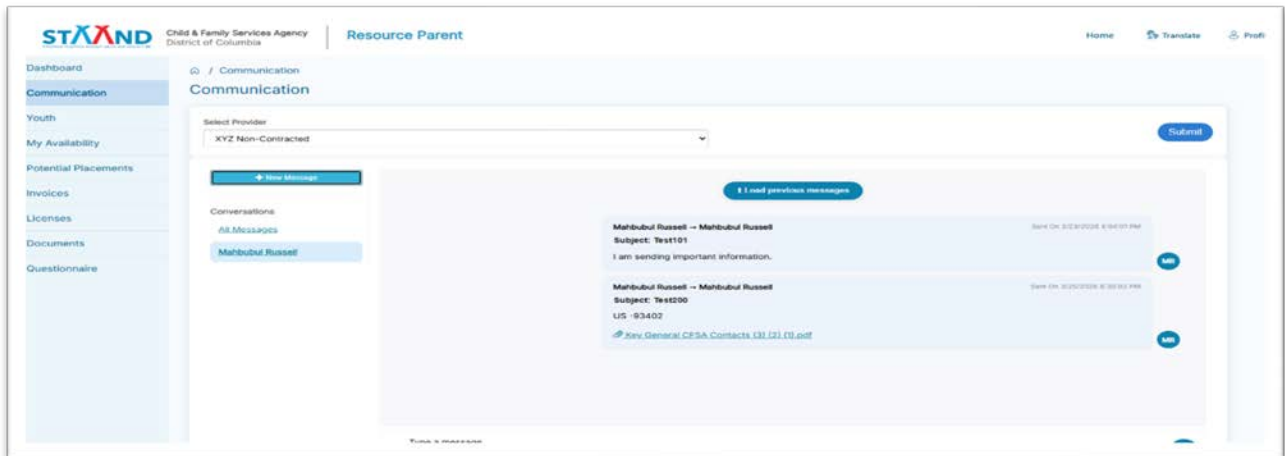


6. The user receives an email with a hyperlink to the record.

New Task is created on Romos-Willings	CFSA.STAAND2 donot...	# STAANDDataVerseP...	Romos-...	Normal	Pending Send	3/25/2026 4:46 PM
You have received a new message from ...	CFSA.STAAND2 donot...	Mahbulul Russell		Normal	Pending Send	3/25/2026 4:30 PM
New Related Intake Referral ID # RF010...	CFSA.STAAND2 donot...	Khandkar Amin		Normal	Pending Send	3/25/2026 3:46 PM



7. Click the New Message button to send a message.



Create an Invoice and Invoice Line



Adhoc Invoice:

1. Navigate to Contract/Service Line screen.
2. Create a New Invoice Line.
3. Create an Invoice and Invoice line.
4. Update the Service End Date to Back Date.

New Invoice Line - Saved
Invoice Line - Information -
2026003767 Invoice

General Admin Related

Agency * Contract/Service Line *
Provider Service/ Goods rendered
Child Service Type
Service Start Date * Service Log
Service End Date * No. of Units *
Rate *
Invoiced Amount * Reason Sent Back
Approved Amount Comments
Net Amount Recoup Amount
Error Description

Contract/Service Line Details

Available Balance
Remaining Balance
Start Date *
End Date
Facility Rate / R&B Rate /
Daily Rate / Hourly Rate
Contract

Payment Adjustments

Offset Adjusted Amount
Addon Adjusted Amount

Episodic Invoice

1. Navigate to Contract/Service Line screen.
2. Create a New Invoice Line.
3. Create an Invoice and Invoice line.
4. Update the Service End Date to Back Date.

New Invoice Line - Saved
Invoice Line - Information -
2026003767 Invoice

General Admin Related

Agency * Contract/Service Line *
Provider Service/ Goods rendered
Child Service Type
Service Start Date * Service Log
Service End Date * No. of Units *
Rate *
Invoiced Amount * Reason Sent Back
Approved Amount Comments
Net Amount Recoup Amount
Error Description

Contract/Service Line Details

Available Balance
Remaining Balance
Start Date *
End Date
Facility Rate / R&B Rate /
Daily Rate / Hourly Rate
Contract

Payment Adjustments

Offset Adjusted Amount
Addon Adjusted Amount

