STAAND Technical User Guide for Provider

Version 2.7 Enhancements
April 2026

STAAND
STRONGER TOGETHER AGAINST ABUSE AND NEGLECT DC
DC Child & Family Services Agency

Table of Contents

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General Navigation

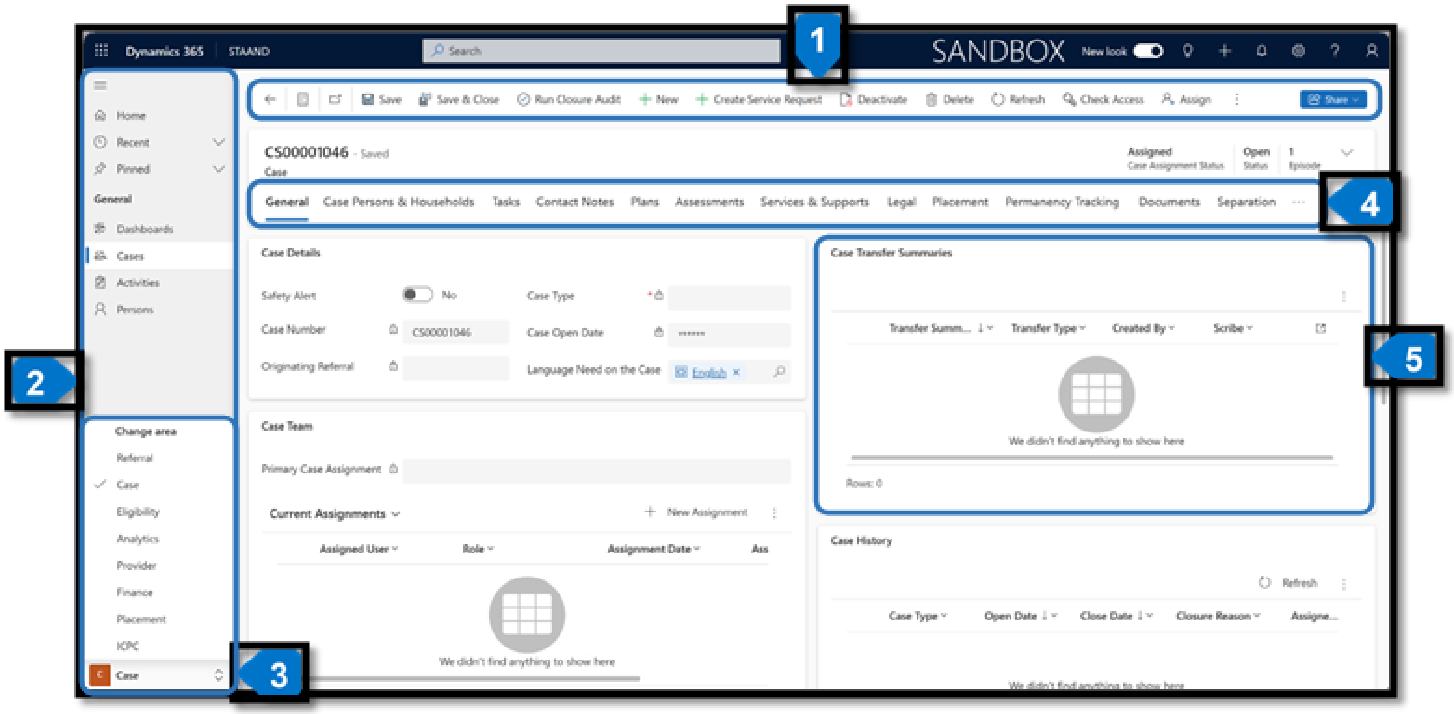
Key Navigational Features

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.



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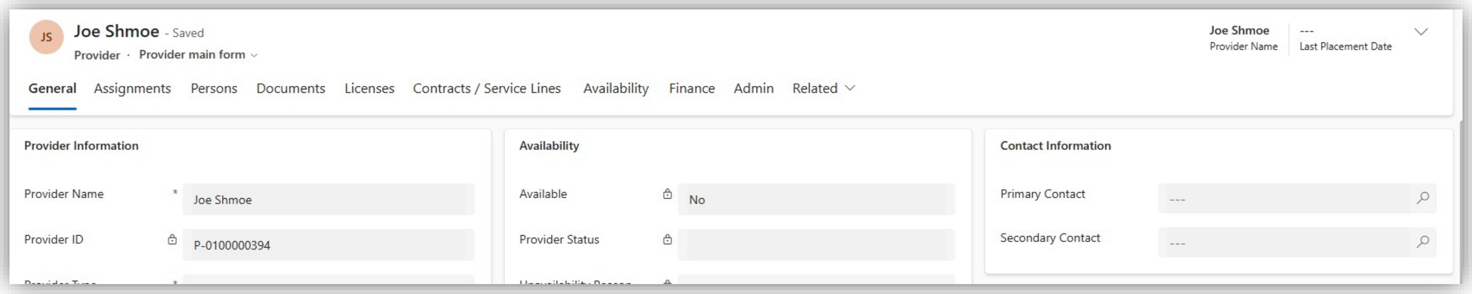
6. **Tabs:** shows different groups of information related to that record.
7. **Subgrid:** is a section of information on the page. It can be formatted as a table, or contain fields that require manual input.

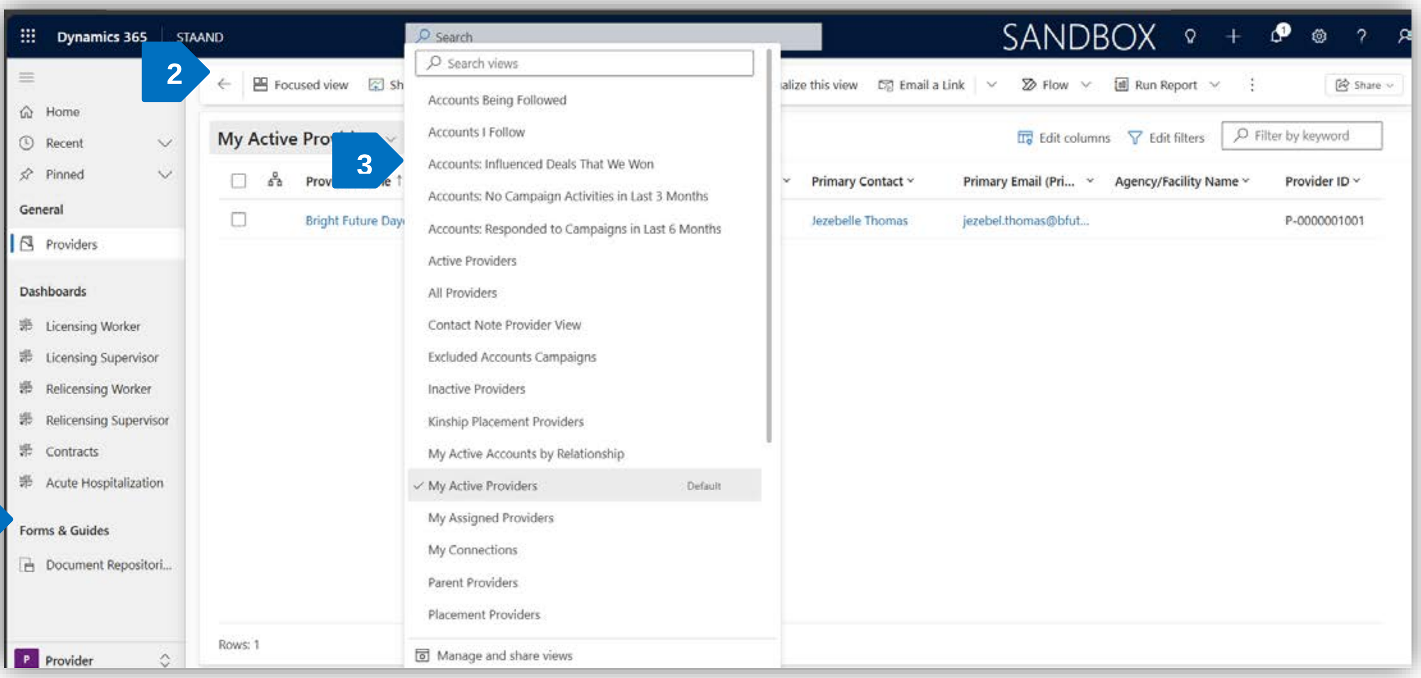


Provider Records

Conducting a Provider Person Search

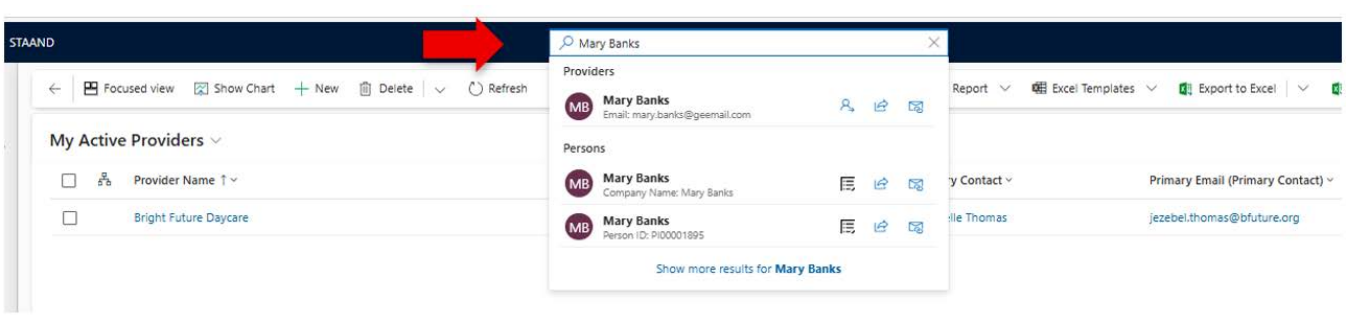
Provider Dashboard

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

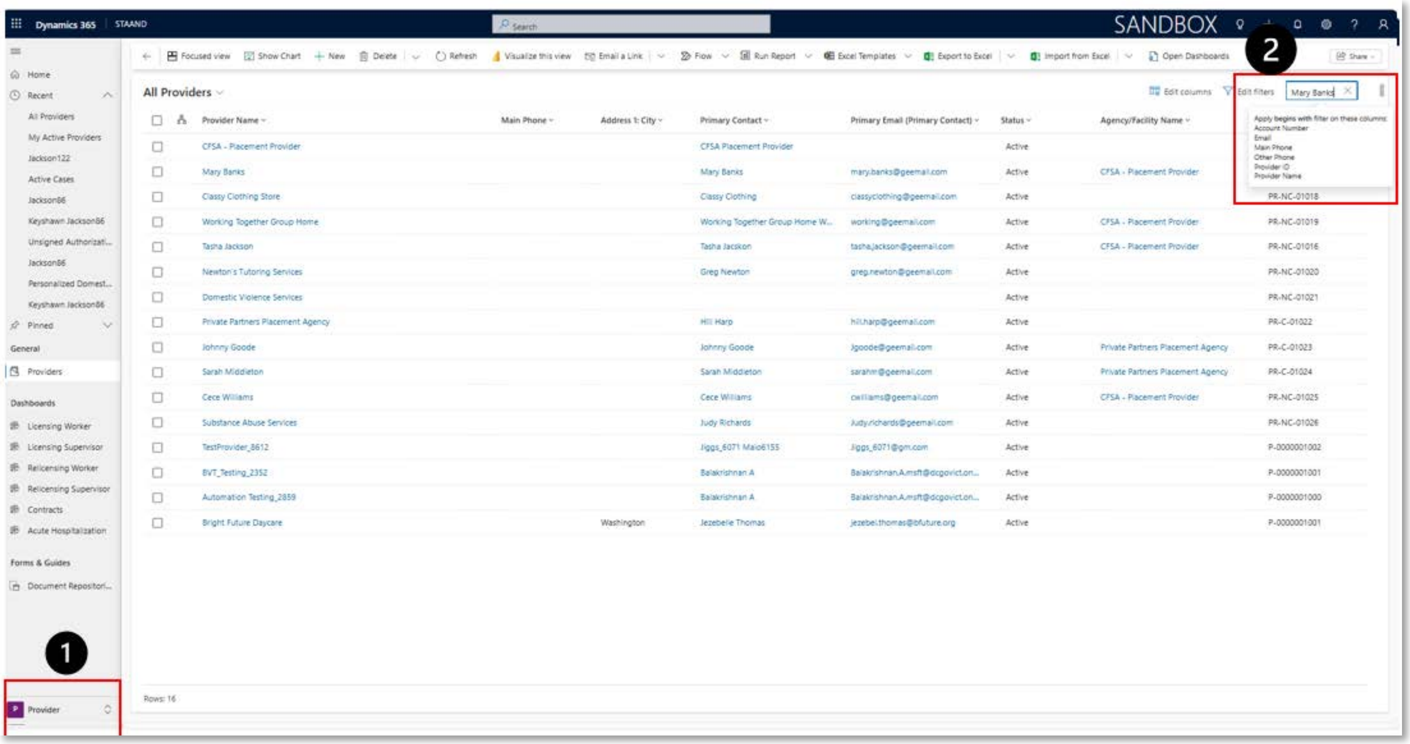
1. Enter the name of the provider in the Global search bar. The Provider record and Person records are revealed. Select the appropriate record as needed.



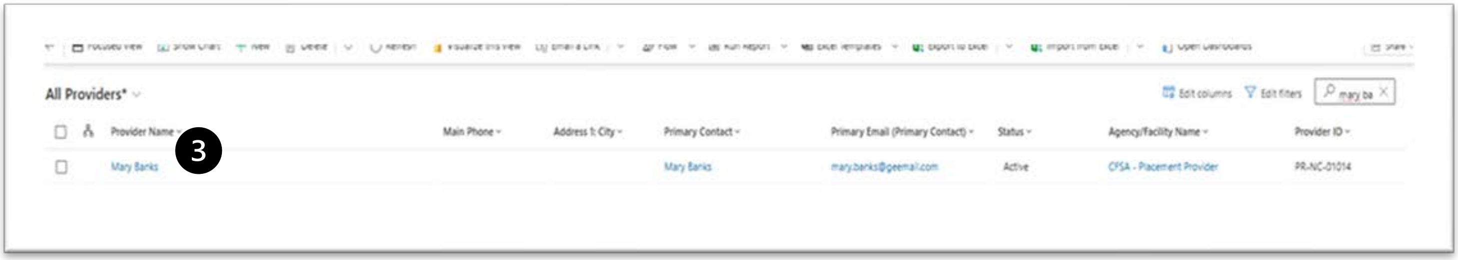
Wildcard Search

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**.

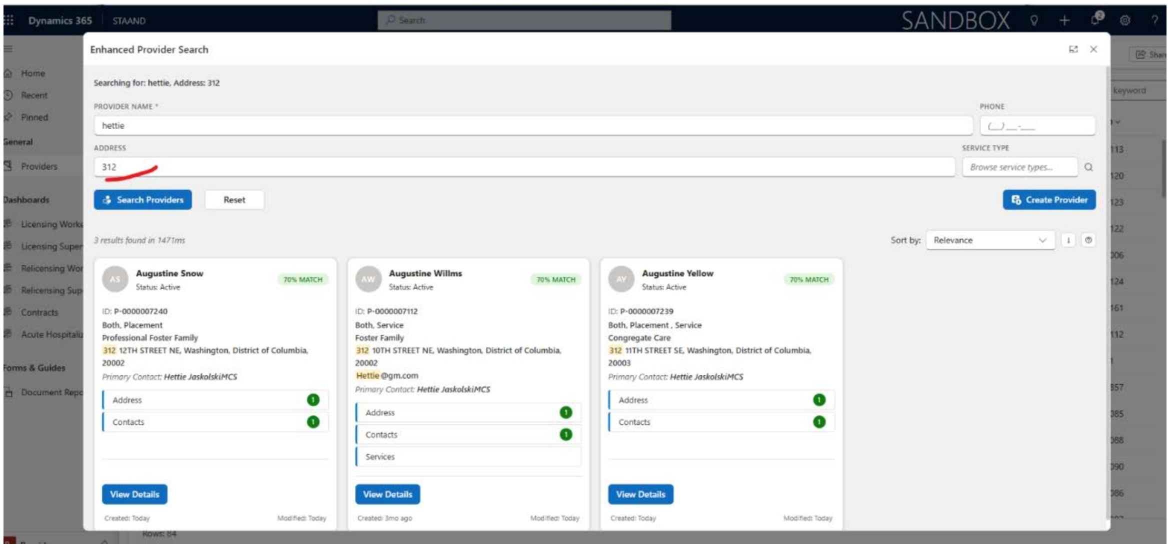


3. The provider's name will populate in the **All Providers** screen.

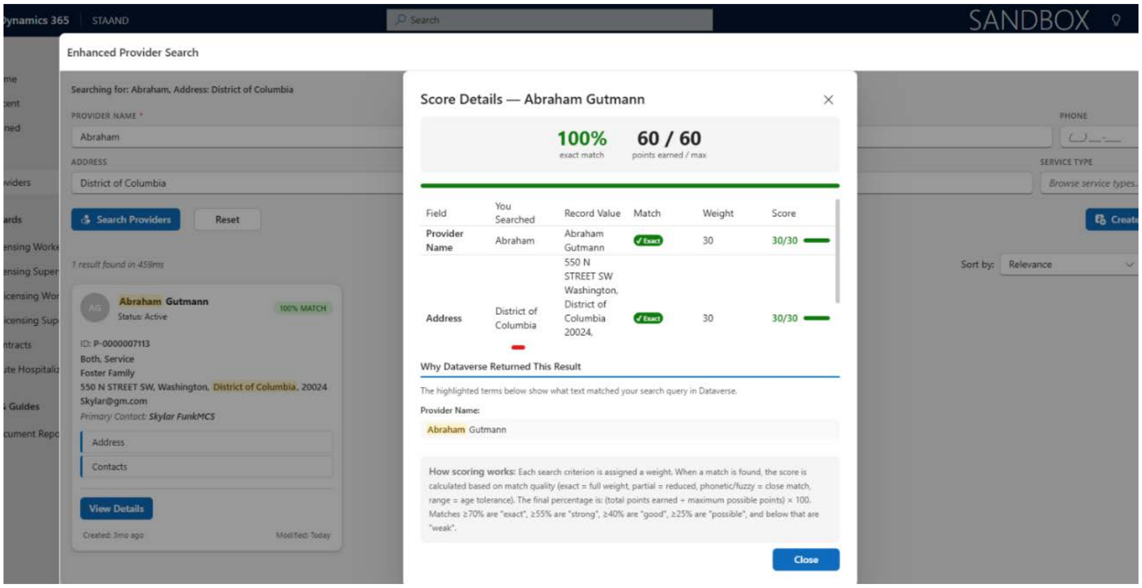


Enhanced Search – By Address

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

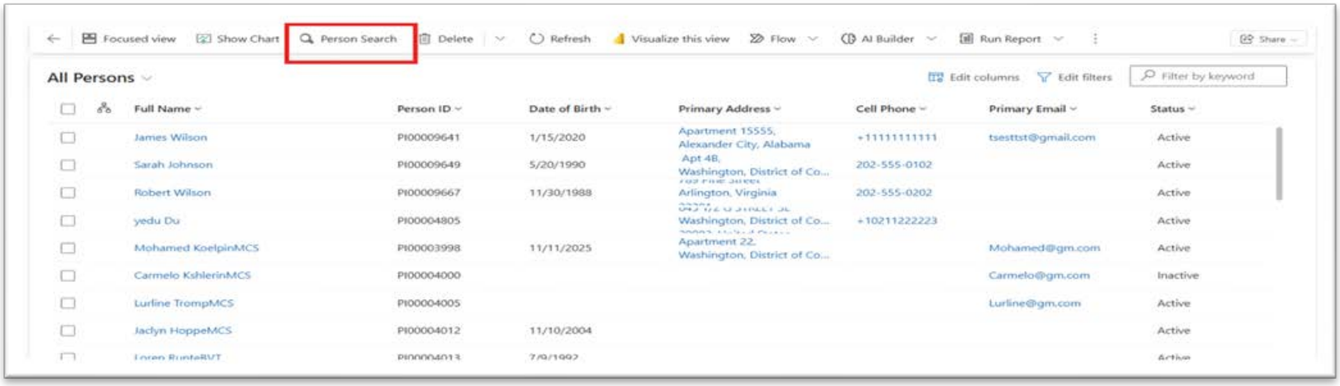


8. The Provider(s) which satisfies the search conditions will be reflected in the Provider Search results.

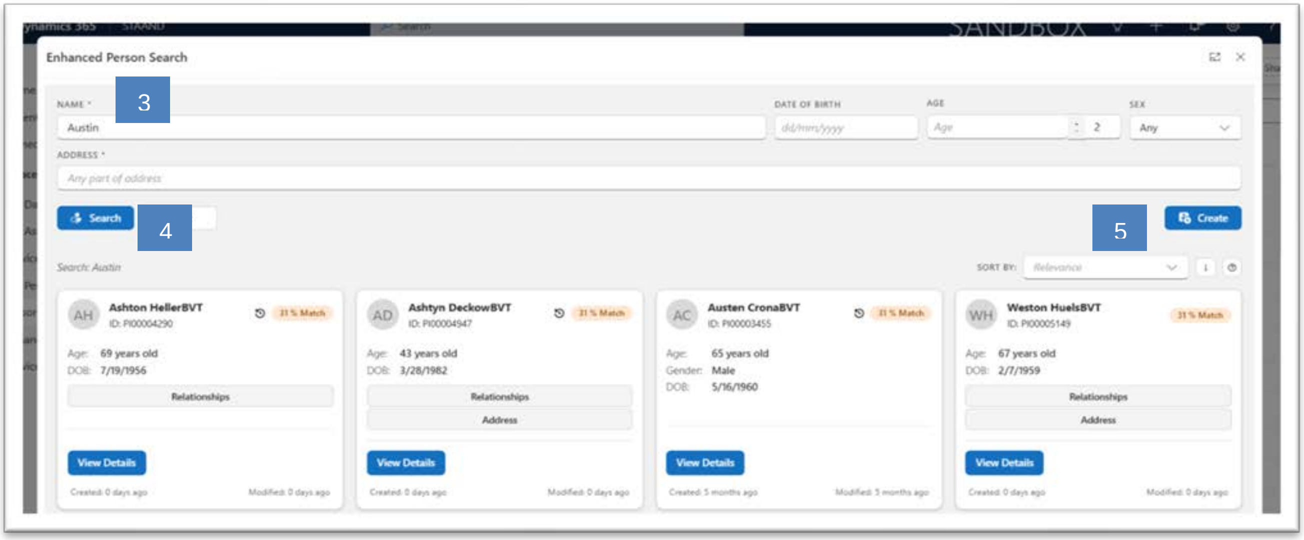


Person Search on Persons View

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



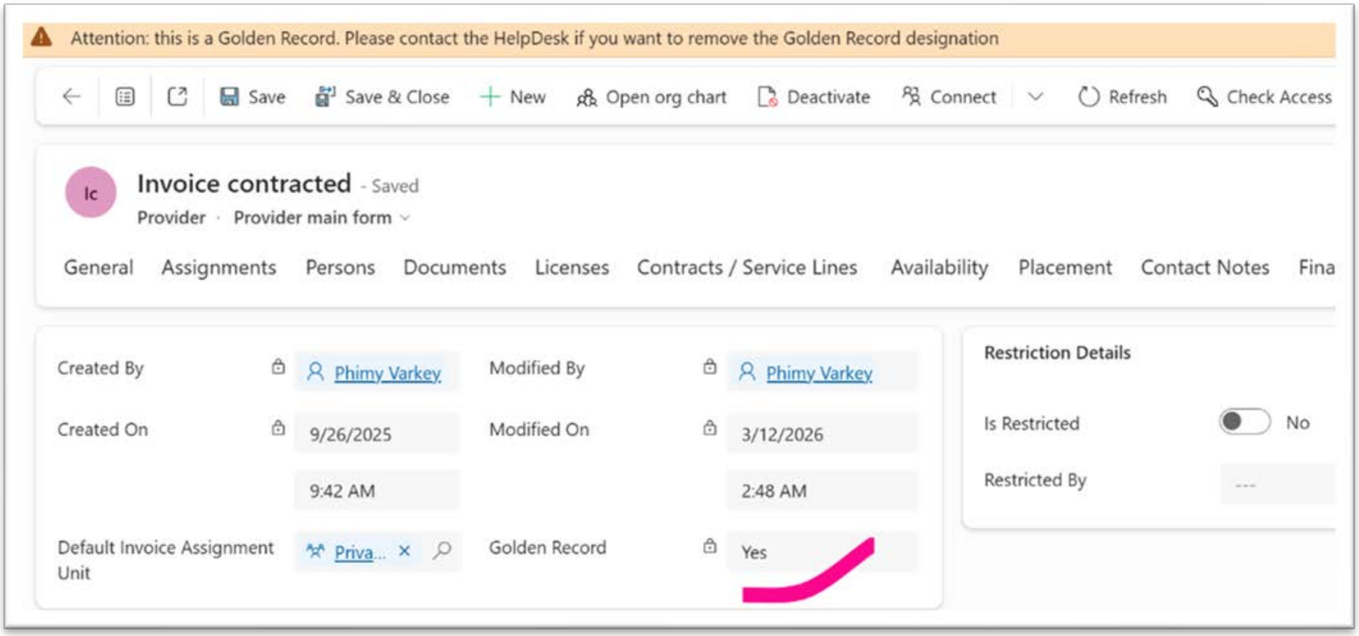
3. Enter the Name, DOB, Age, Address whichever required
4. Click on Search to see the results
5. Click on Create-to-Create New Person



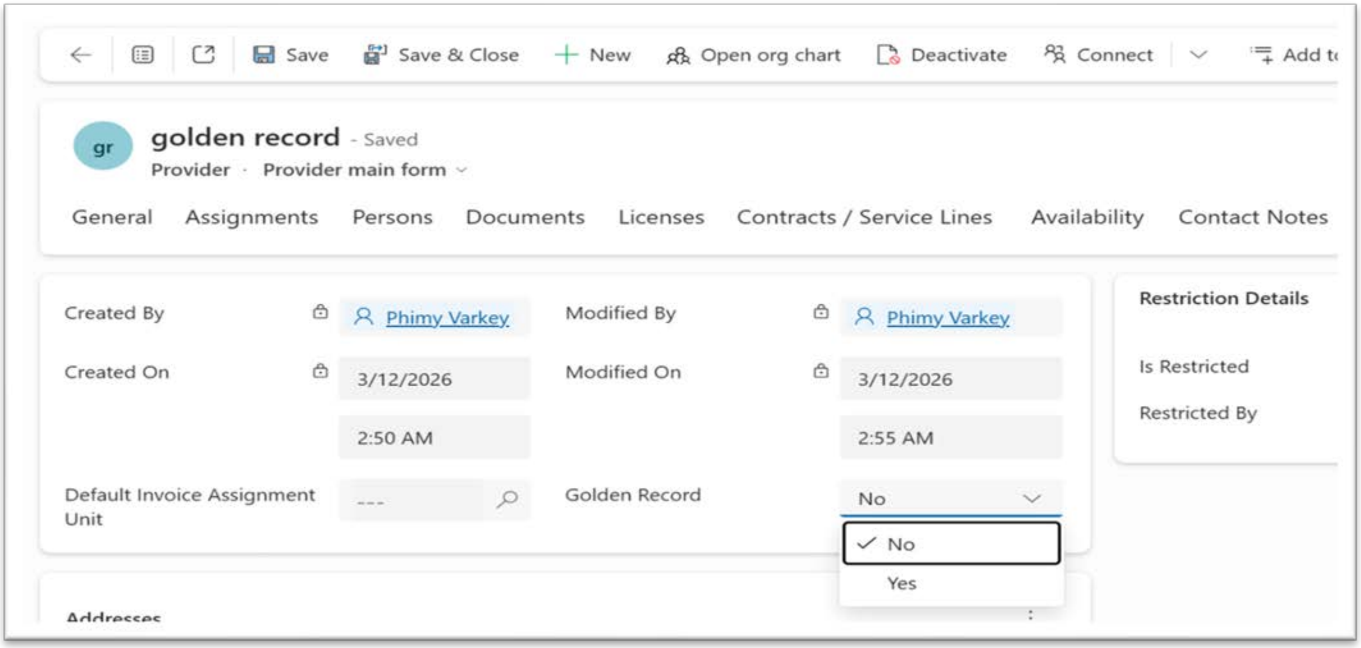
Golden Record

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).

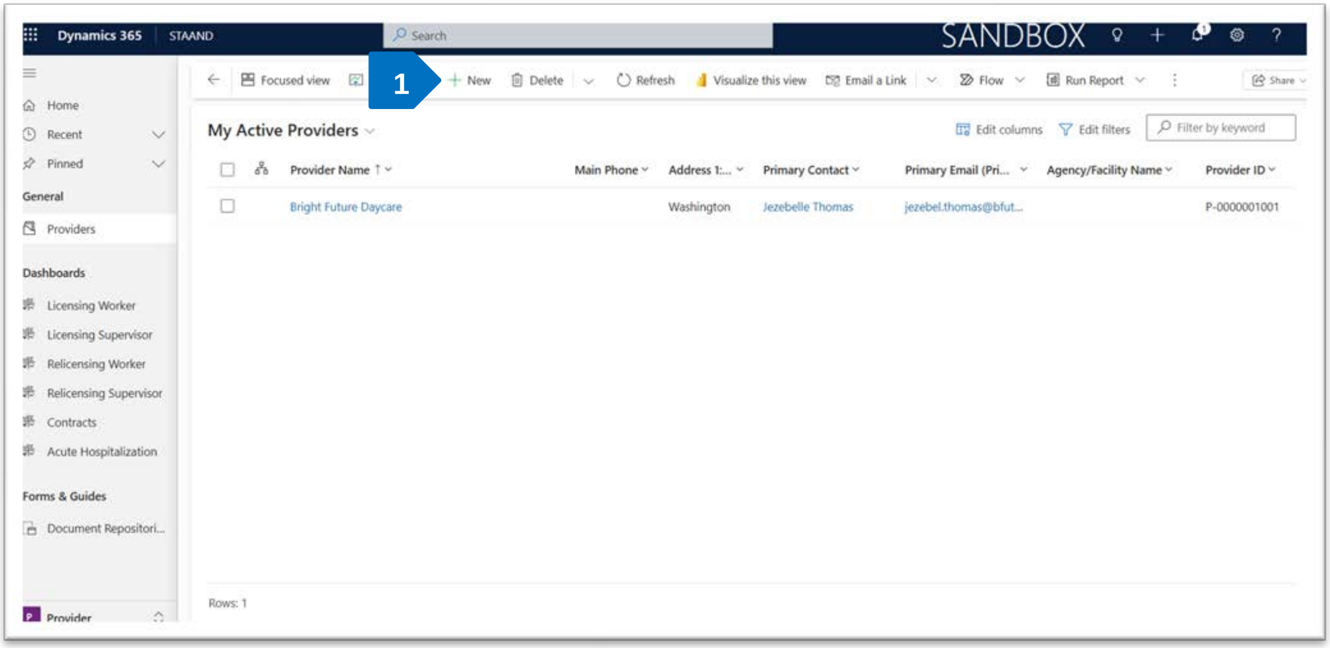


Note:

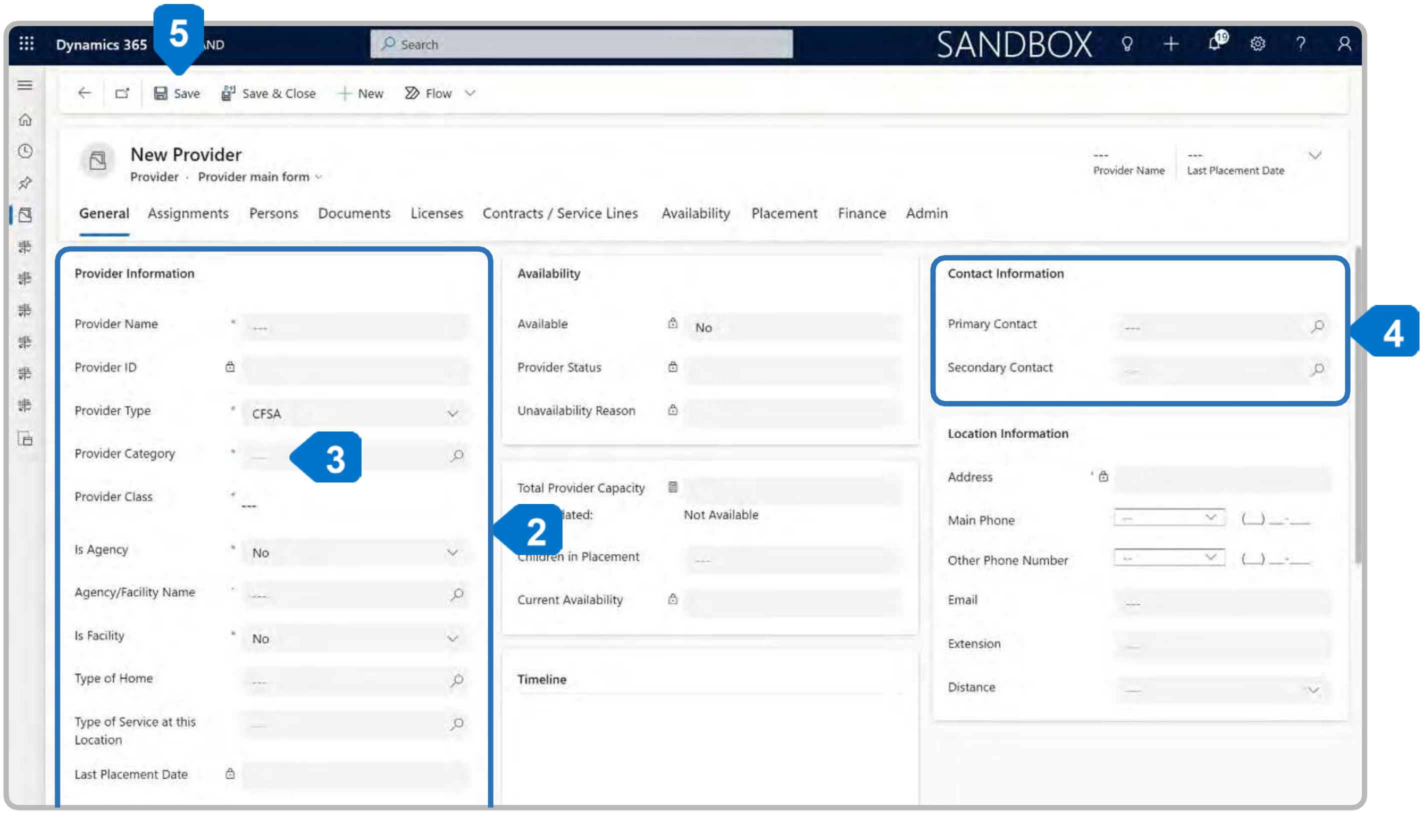
- When set to Yes, the Provider record is identified as a Golden Record.
- The record should not be deleted during merge or cleanup processes.
  Once labeled a Golden Record, the record cannot be inactivated by any user other than the Admin.

How To: Create a Service Provider

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



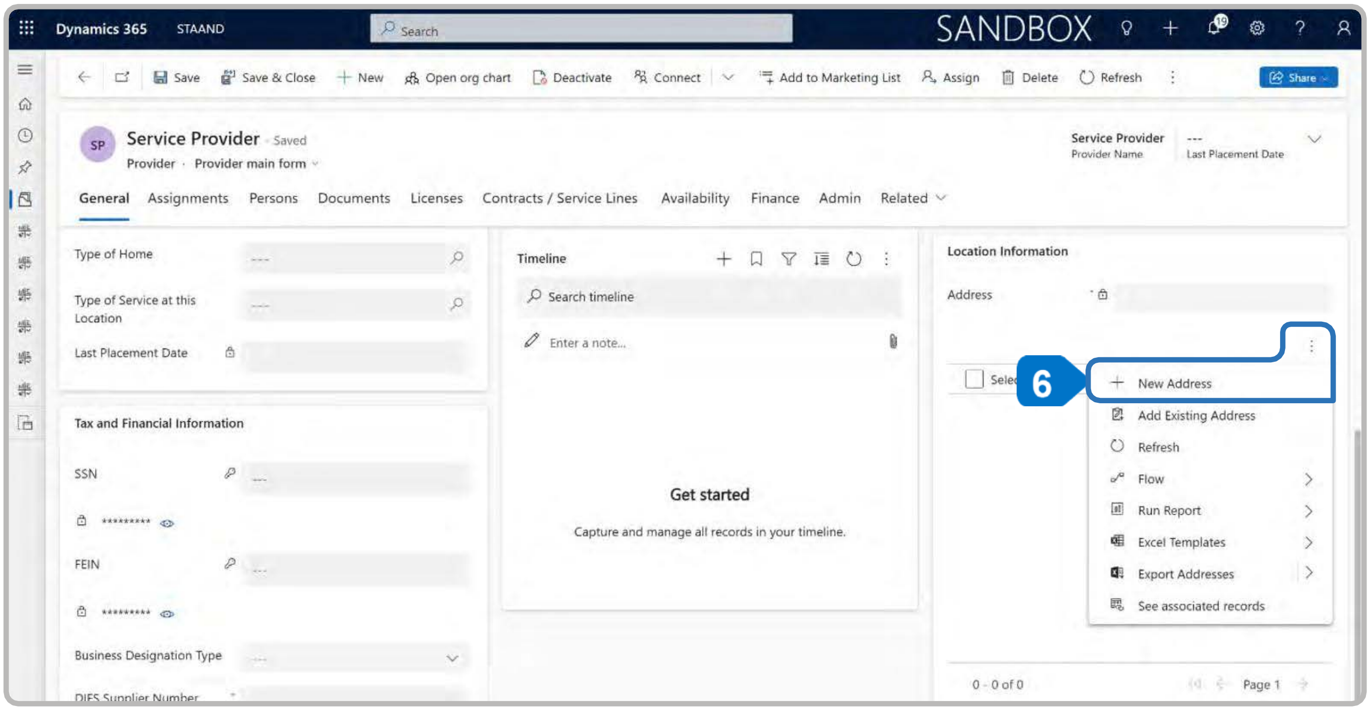
2. Complete all fields, including Provider Name, Type, and Class.
3. Select Service Provider for the Provider Category field.
4. Enter a Primary Contact within the Contact information sub-grid (secondary contact can be added as needed).
5. Select Save.



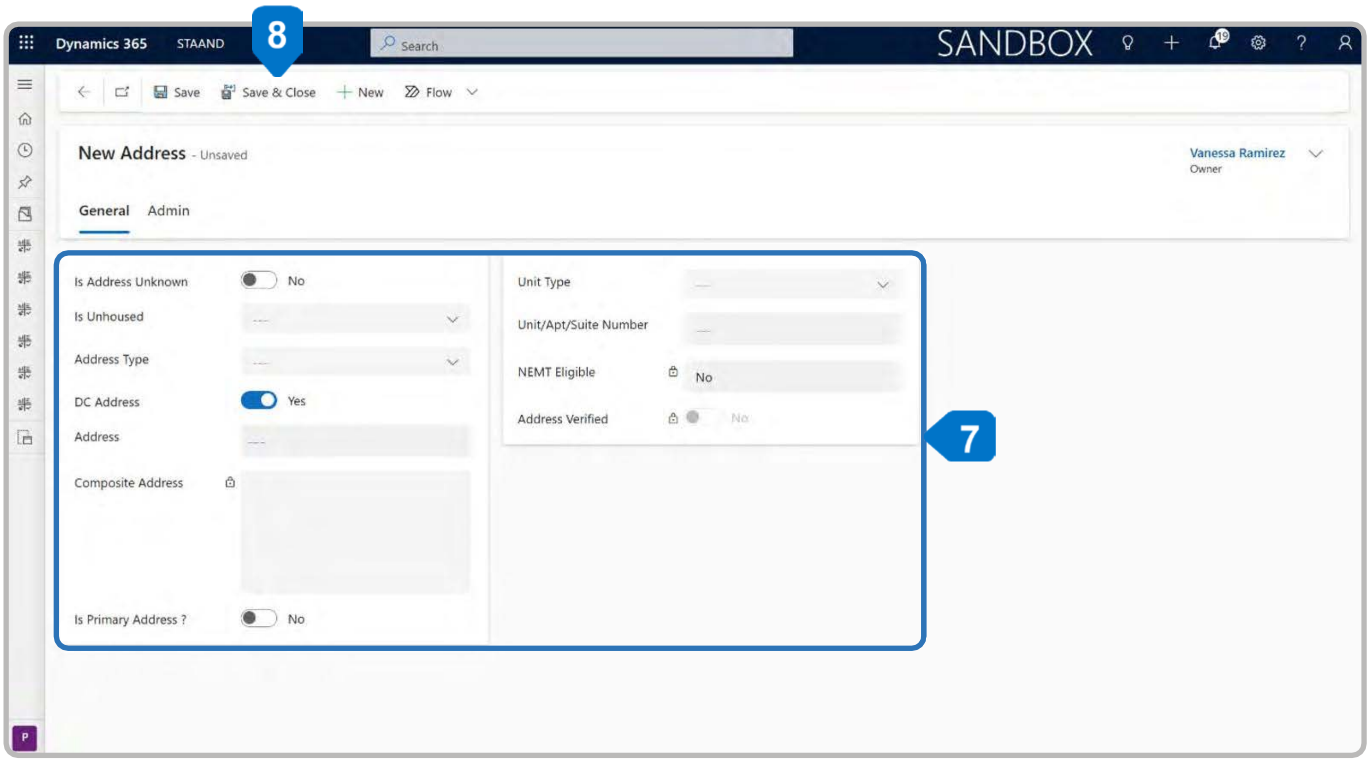
Note:

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

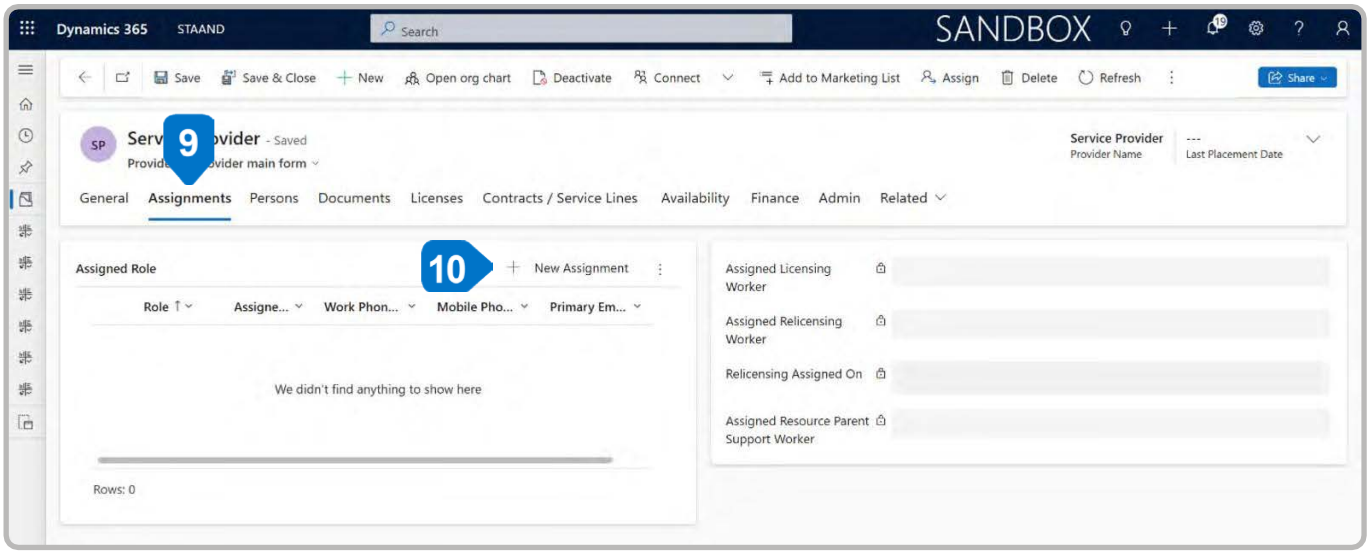
6. From the Location Information sub-grid, select + New Address If not visible, select the more commands icon to view more options:



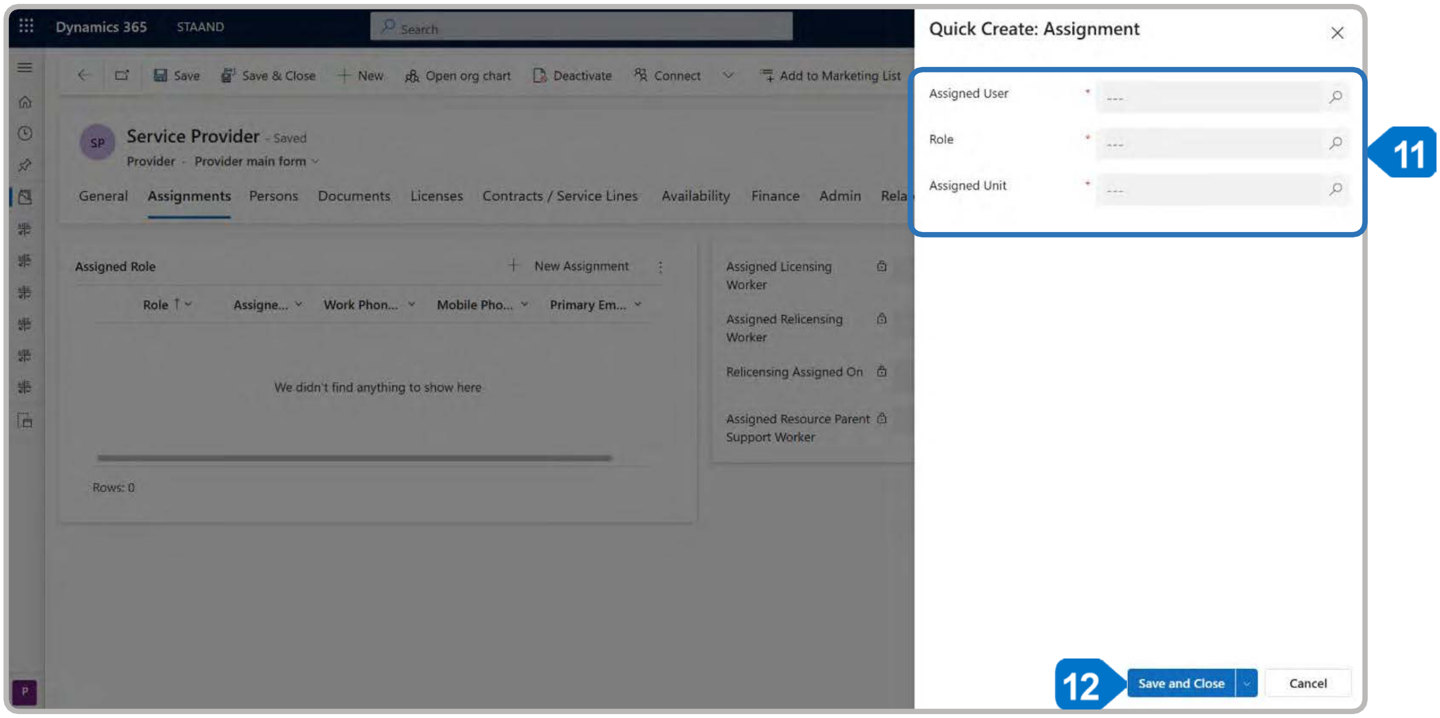
7. Complete all fields.
8. Select Save & Close.



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.

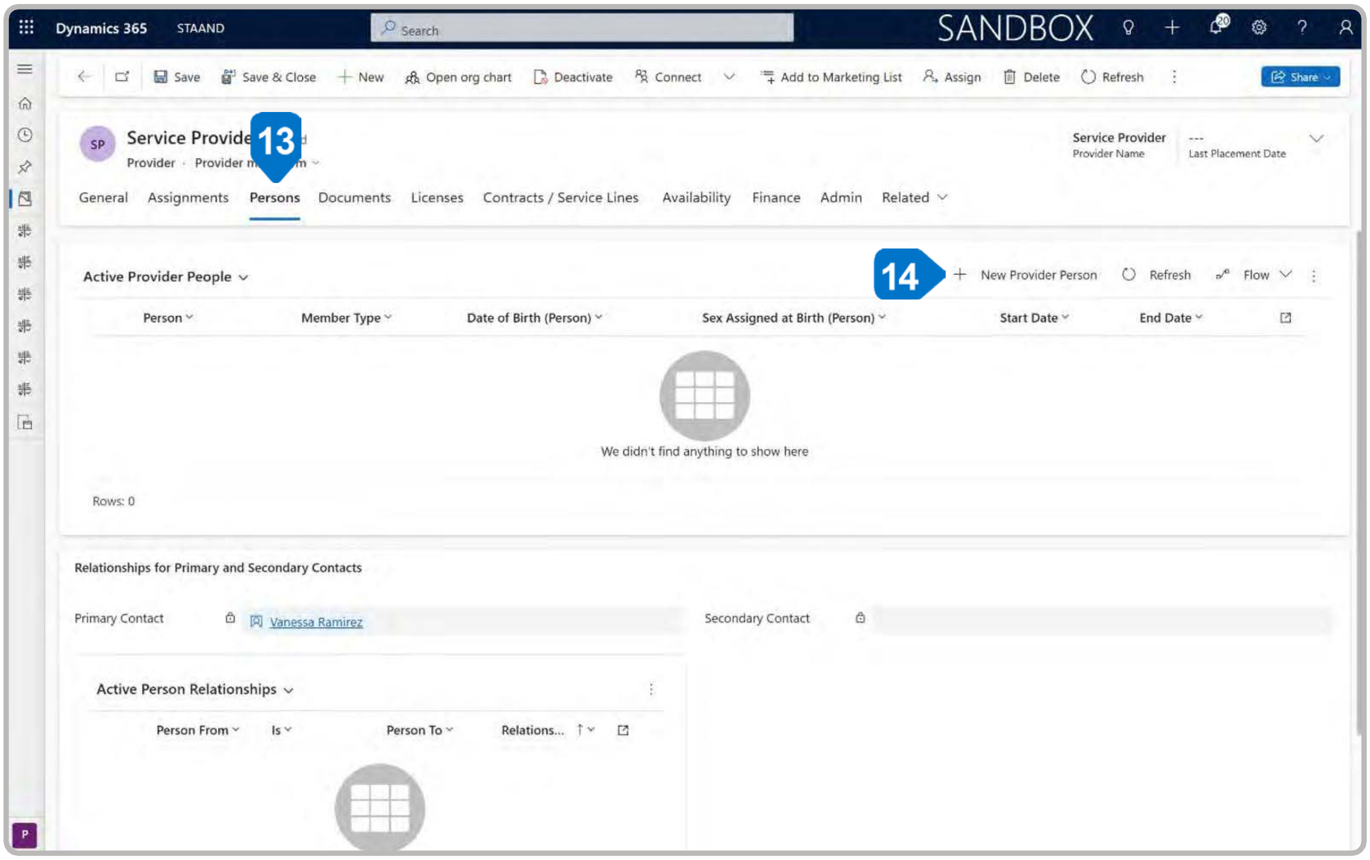


Important Tip:

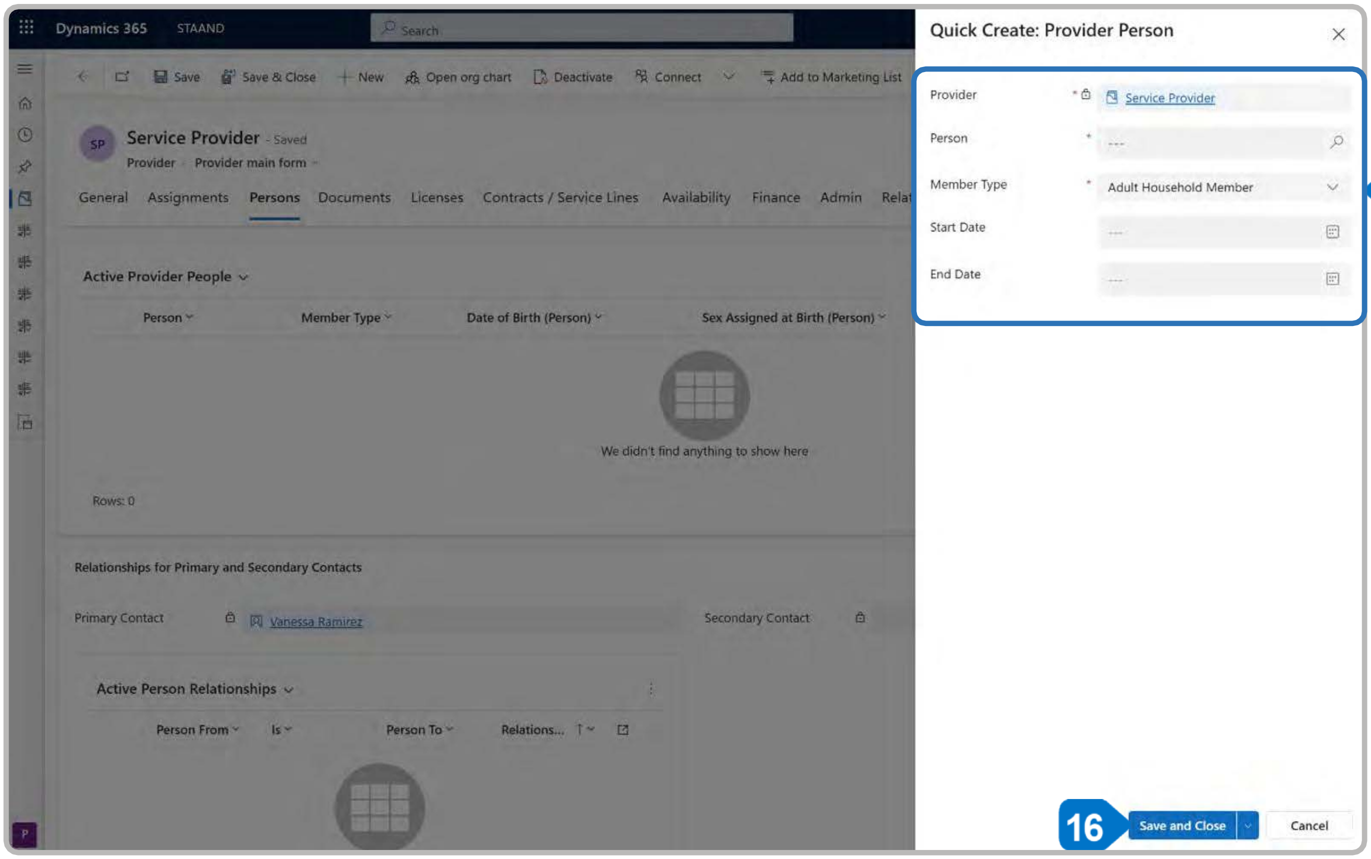
User can create multiple assignments by repeating steps 9-12.

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

14. Select + New Provider Person.

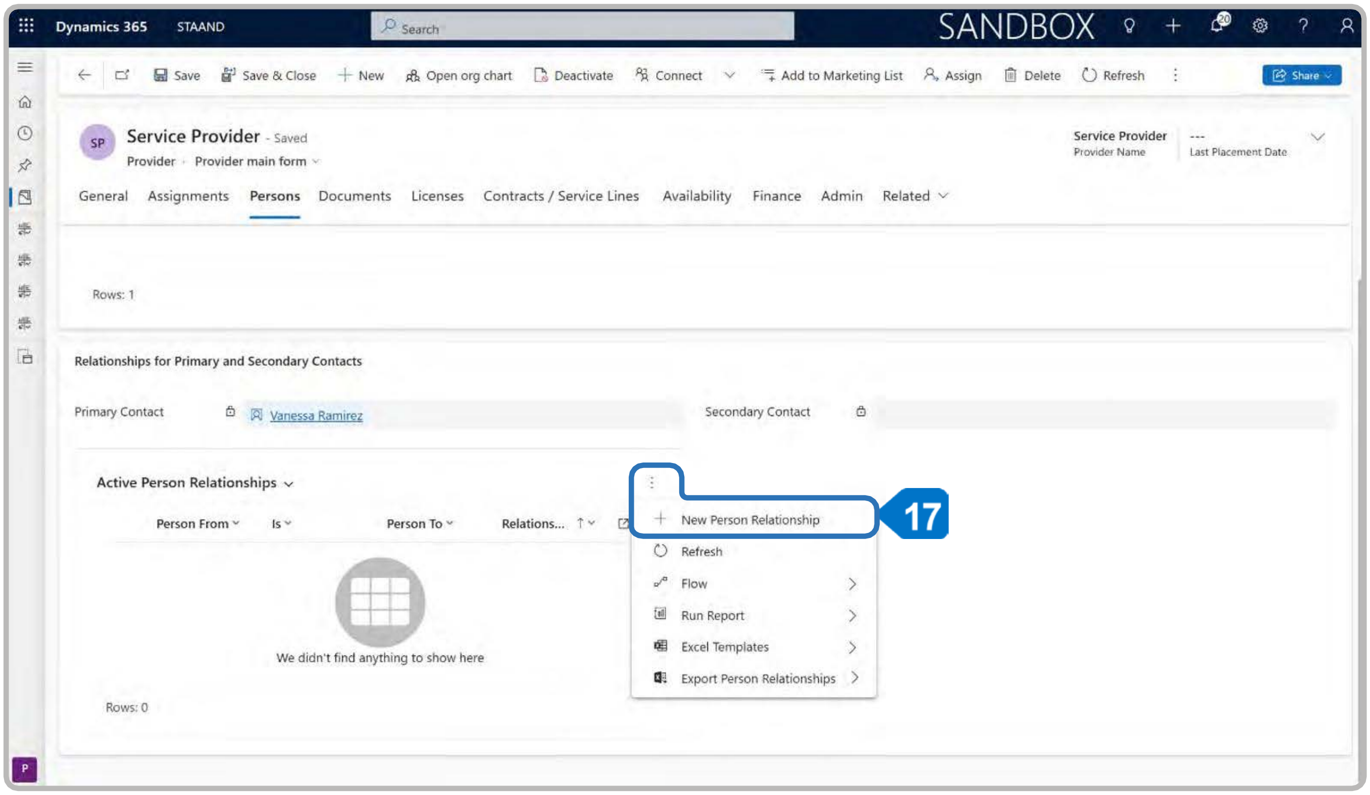


15. Complete all fields within the Quick Create: Provider Person window.
16. Select Save and Close.



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

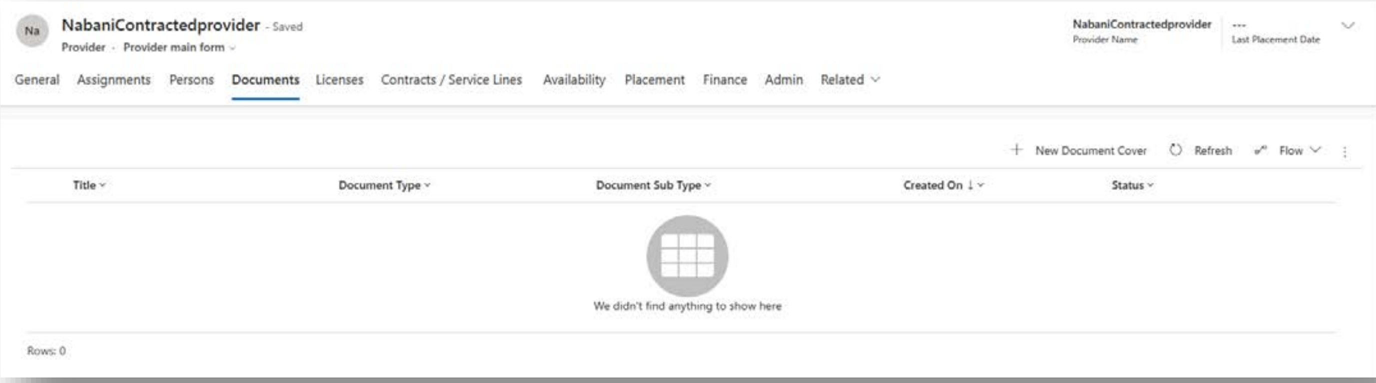
17. To create a New Person Relationship, from the Active Persons Relationships sub-grid, select + New Person Relationship. If not visible, select the more commands option to view more options.



Important Tip:

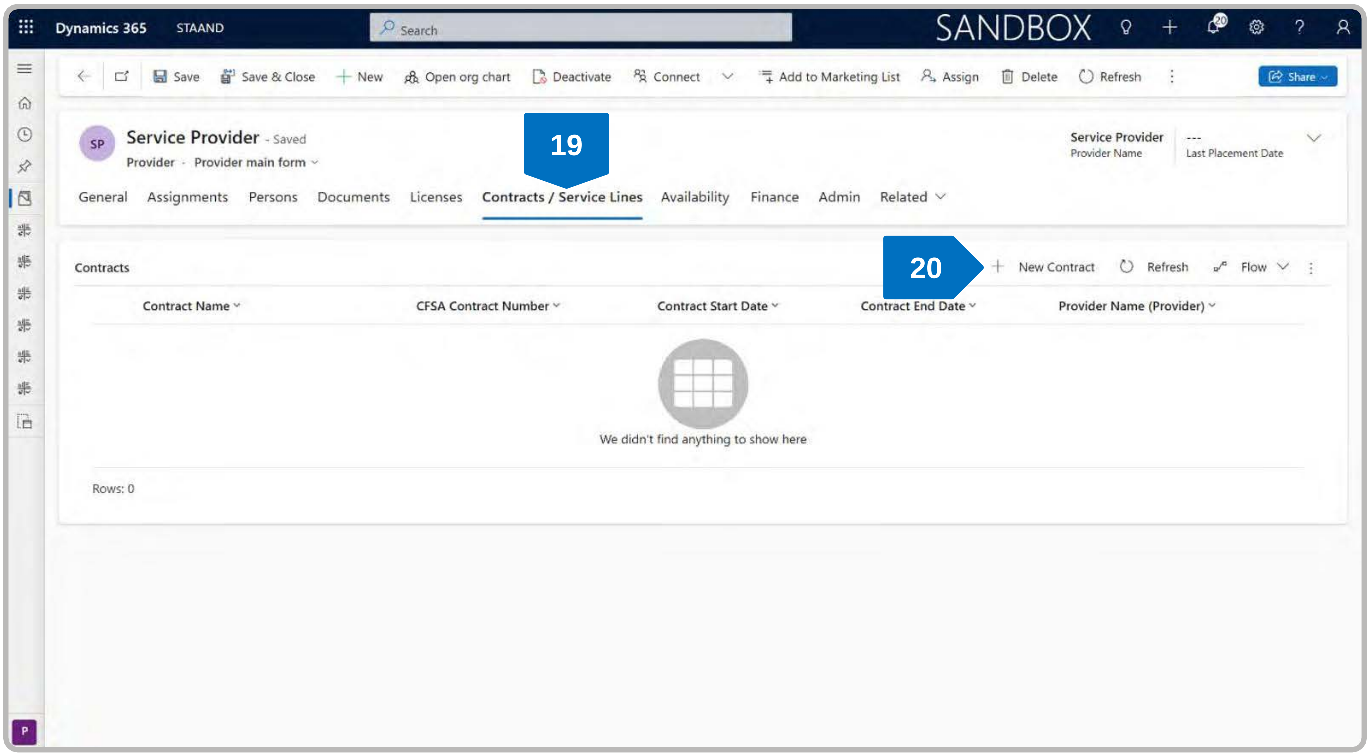
Adding a relationship for Primary and Secondary Contacts is not required and is at the discretion of User.

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.



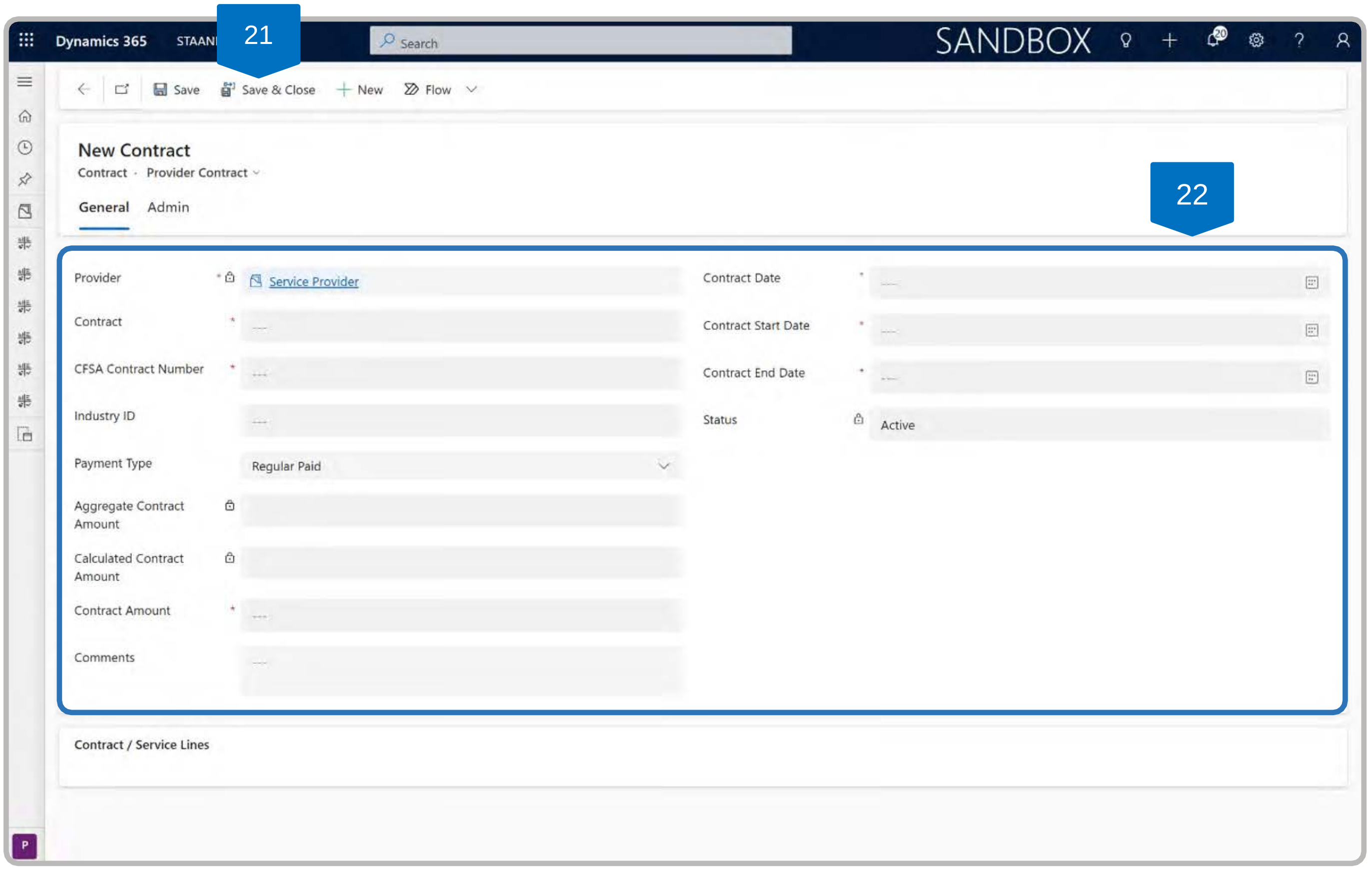
19. To add a Contract or a Service Line, select the Contracts/Service Lines tab.

20. For new Contract: Select + New Contract.

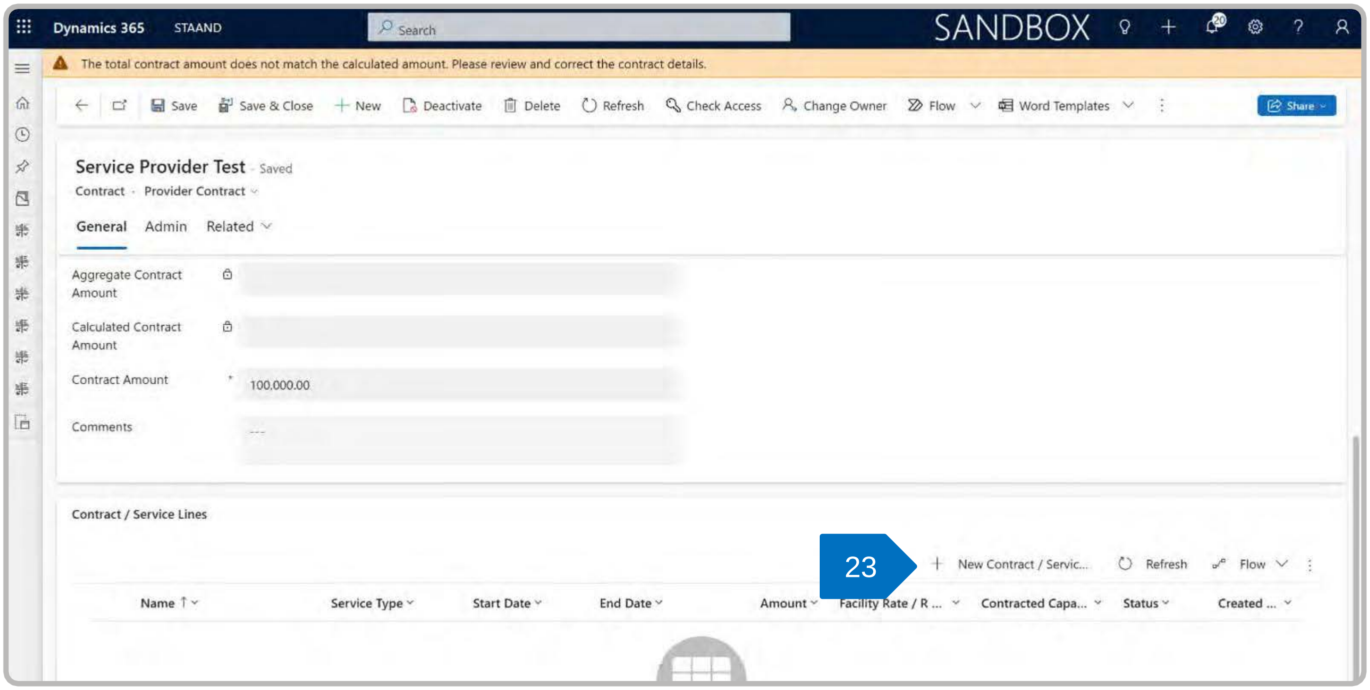


21. Complete all fields including Contract Name, CFSA Contract Number, Contract Amount, Contract Date, and Contract Start and End Date.

22. Select Save.



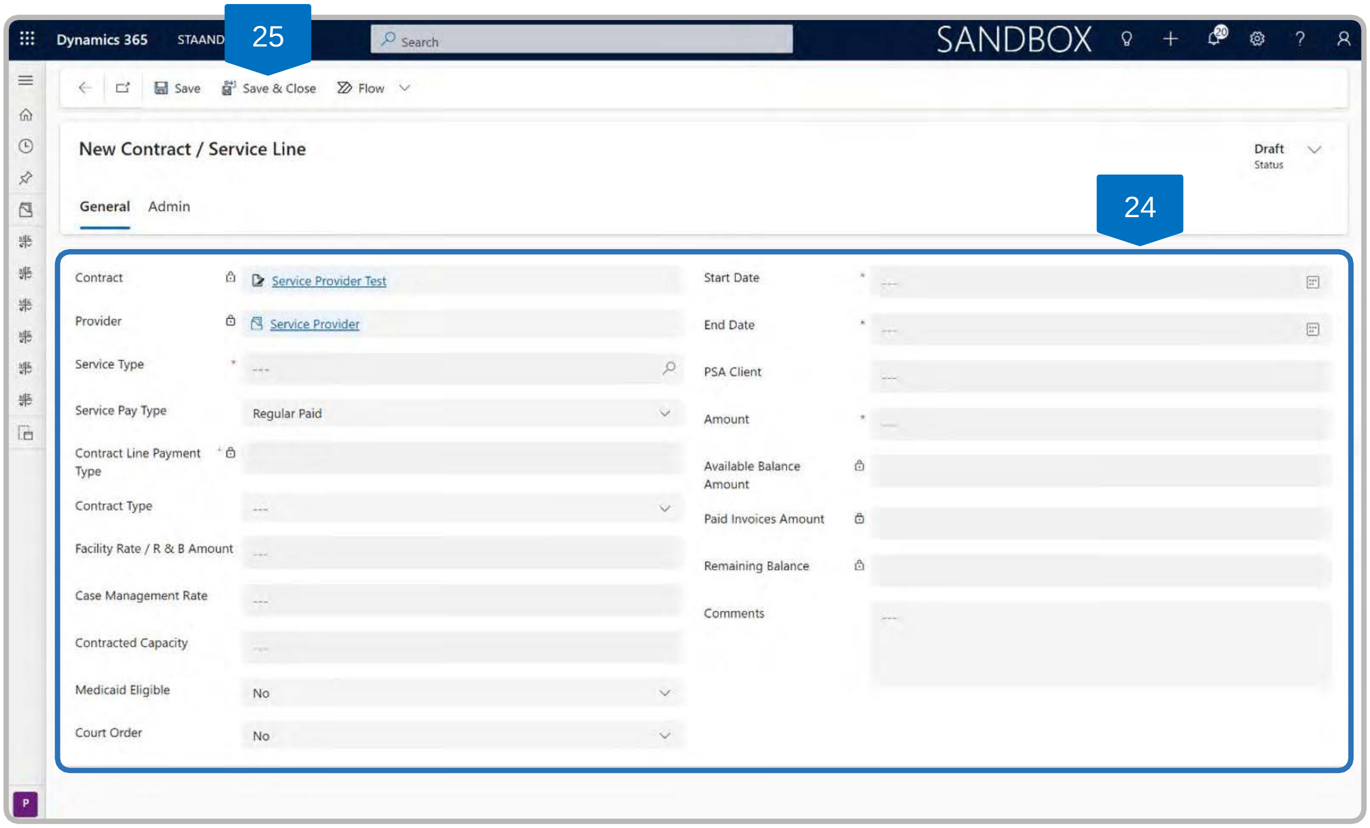
23. To add a new Contract Line or Service Line, from the Contract/Services Lines sub-grid, select + New Contract/Services.


Dynamics 365
STAAND
Search
SANDBOX
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

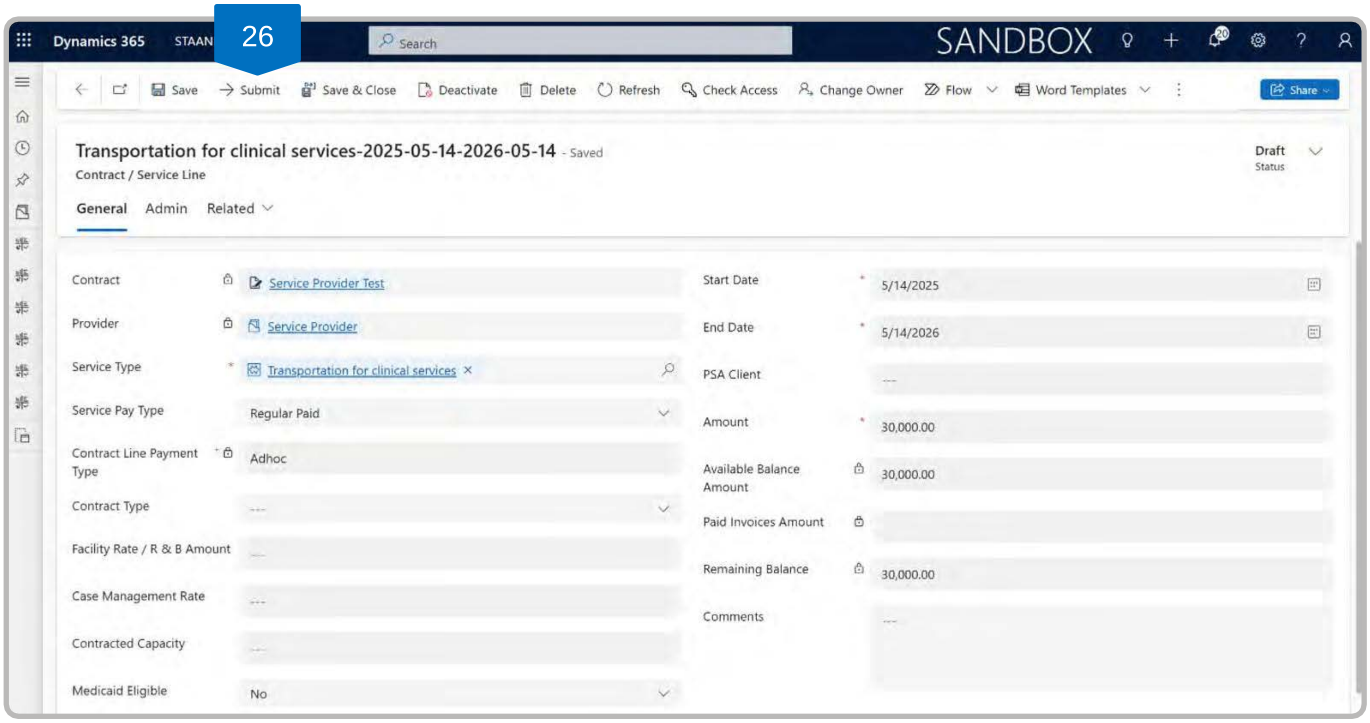
Contract / Service Lines
23
New Contract / Servic...
Refresh
Flow
Name
Service Type
Start Date
End Date
Amount
Facility Rate / R ...
Contracted Capa...
Status
Created ...

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

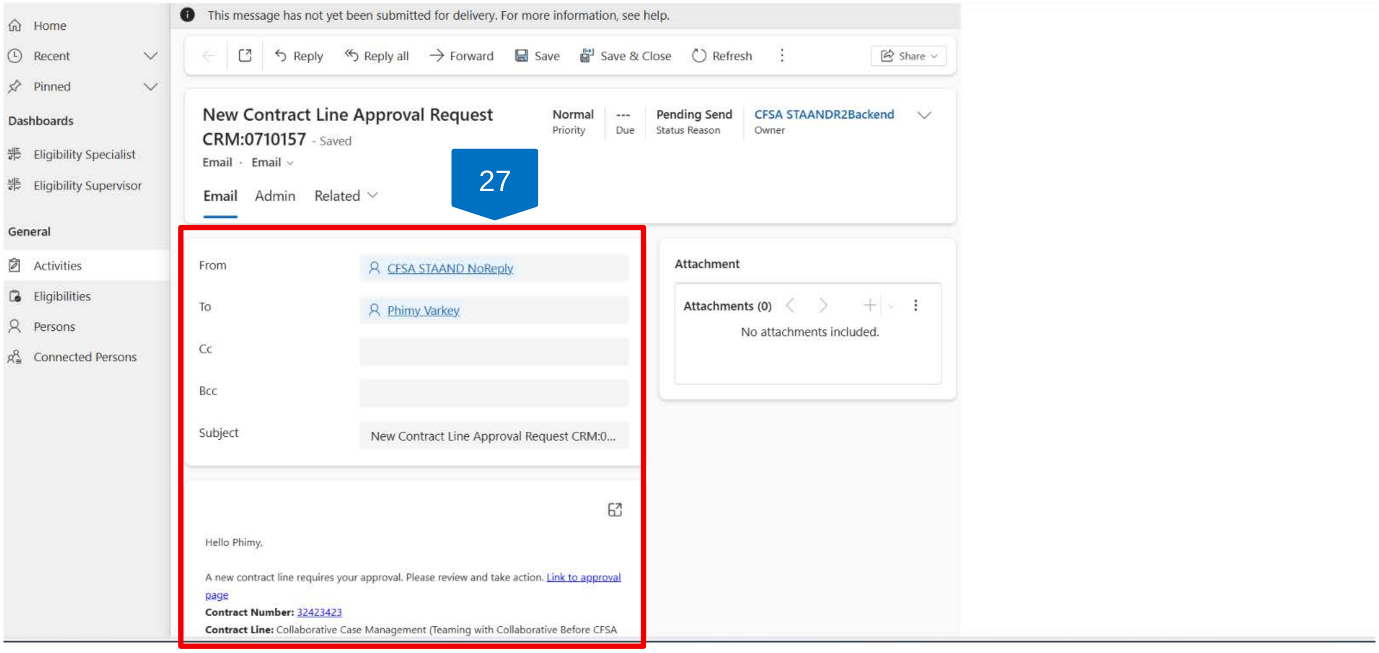
25. Select Save.



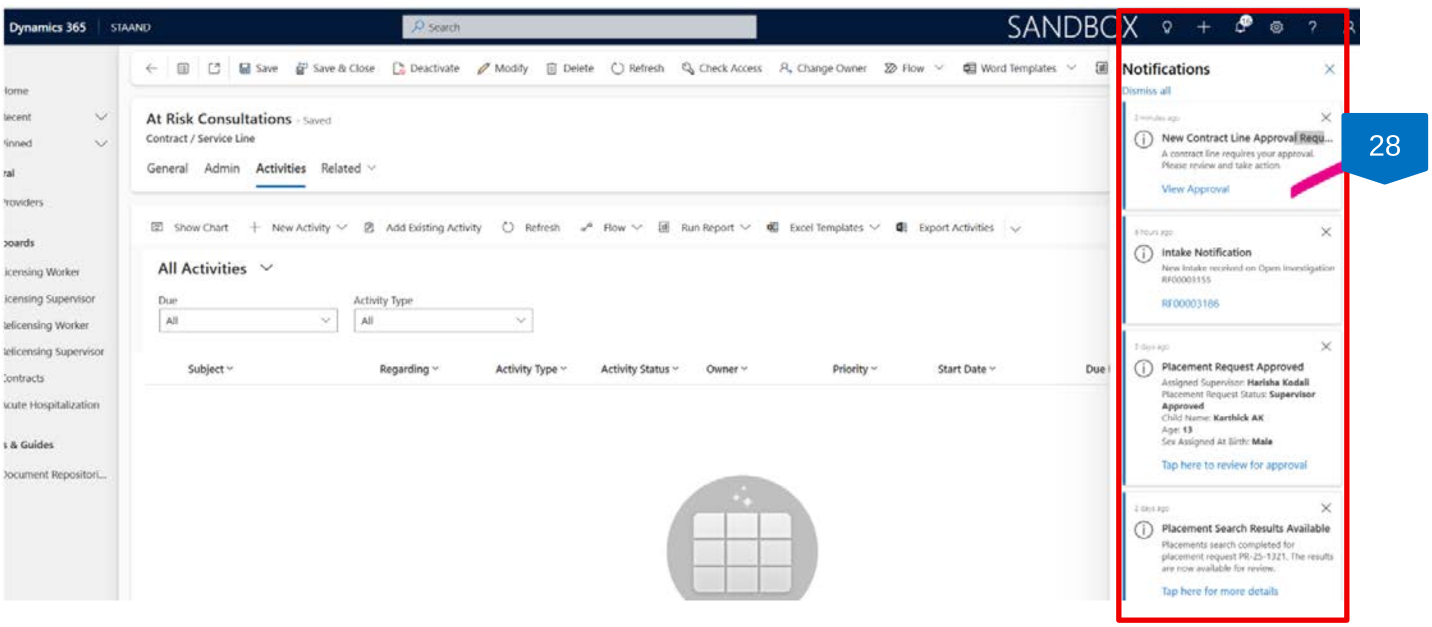
26. Select Submit from the Action Toolbar to submit for approval.



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

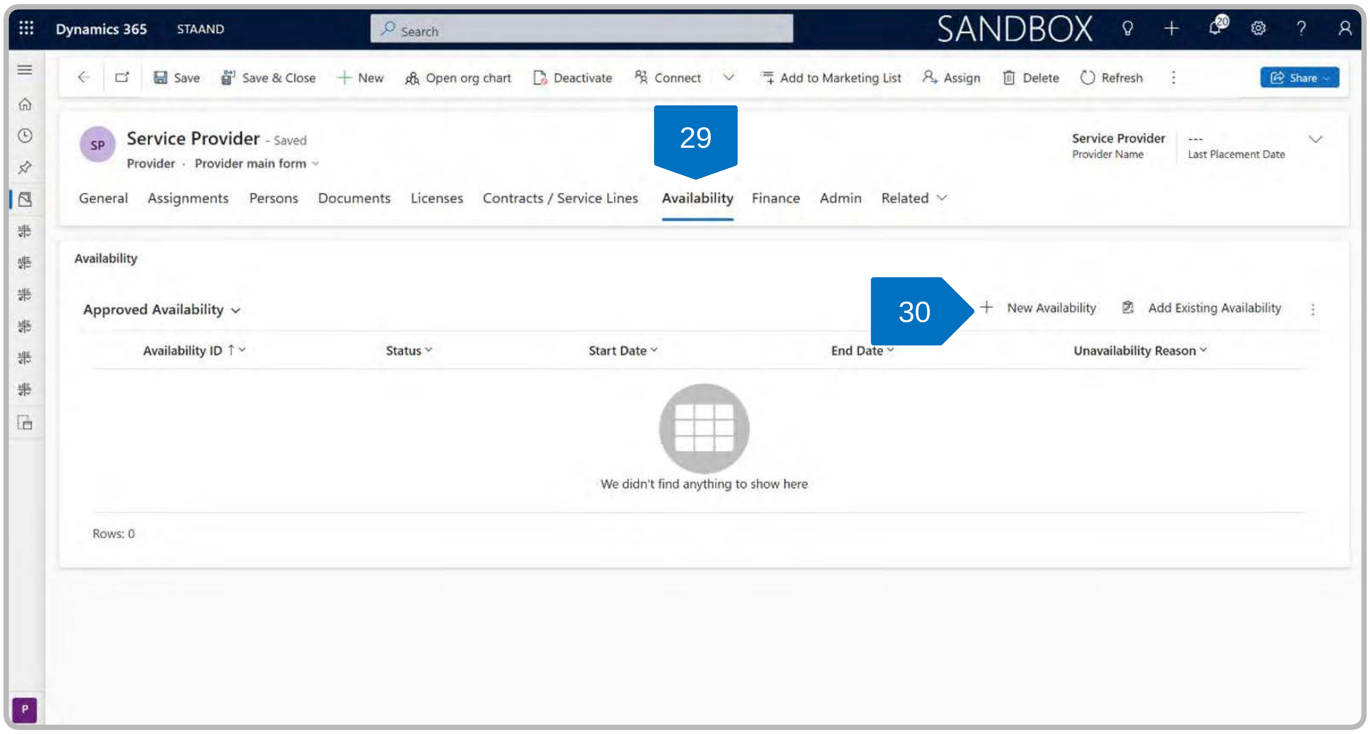


28. The approver will receive a system generated notification and an email notification.



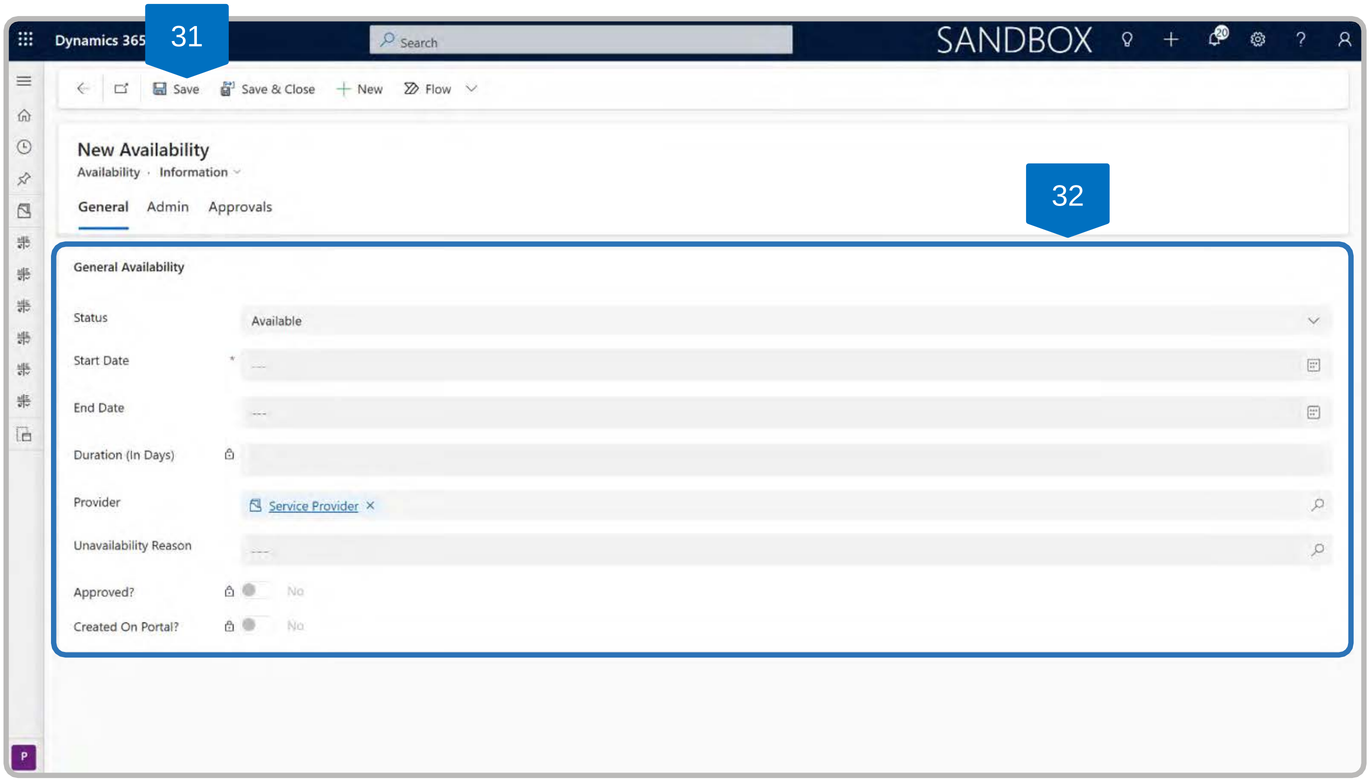
29. To Add New Availability, select the Availability tab.

30. Select + New Availability.



31. Complete all fields including Status and Start Date.

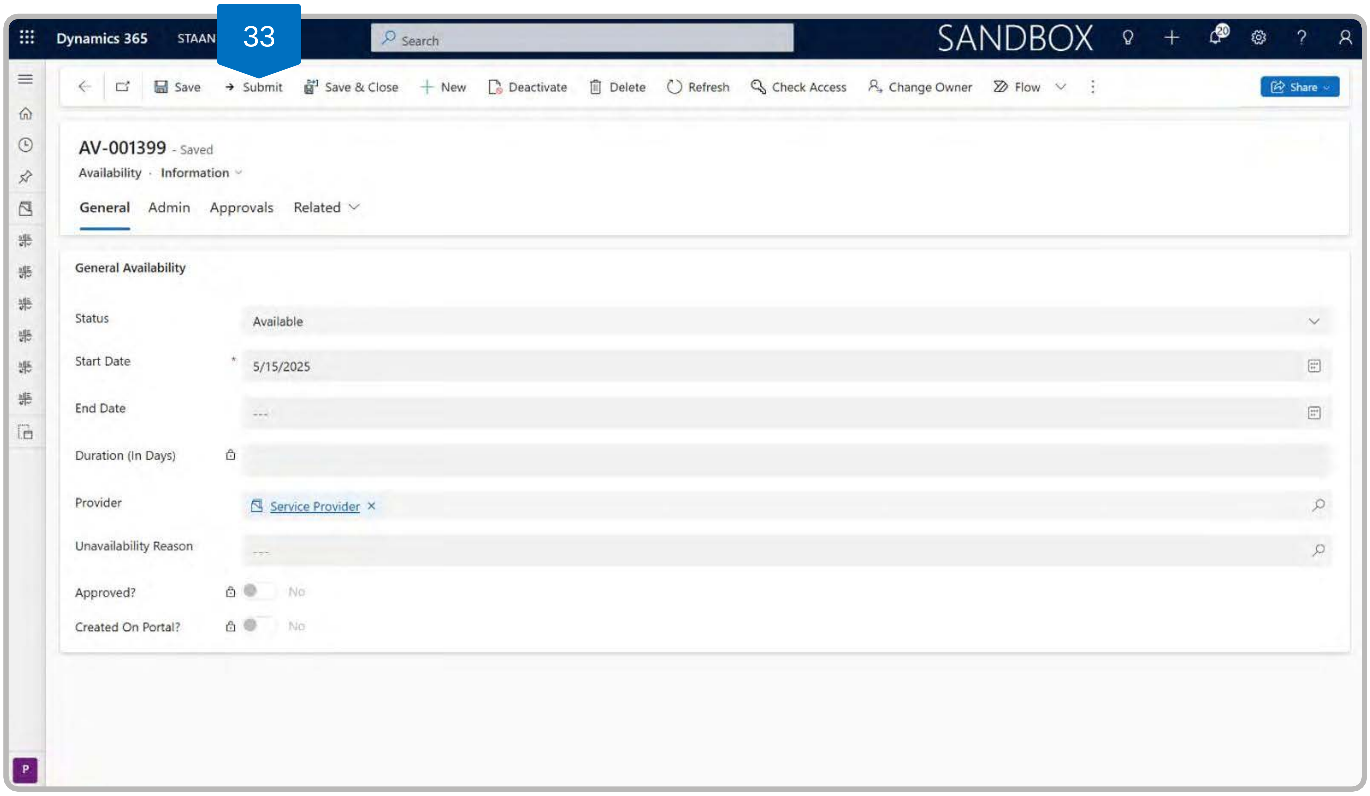
32. Select Save.



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.



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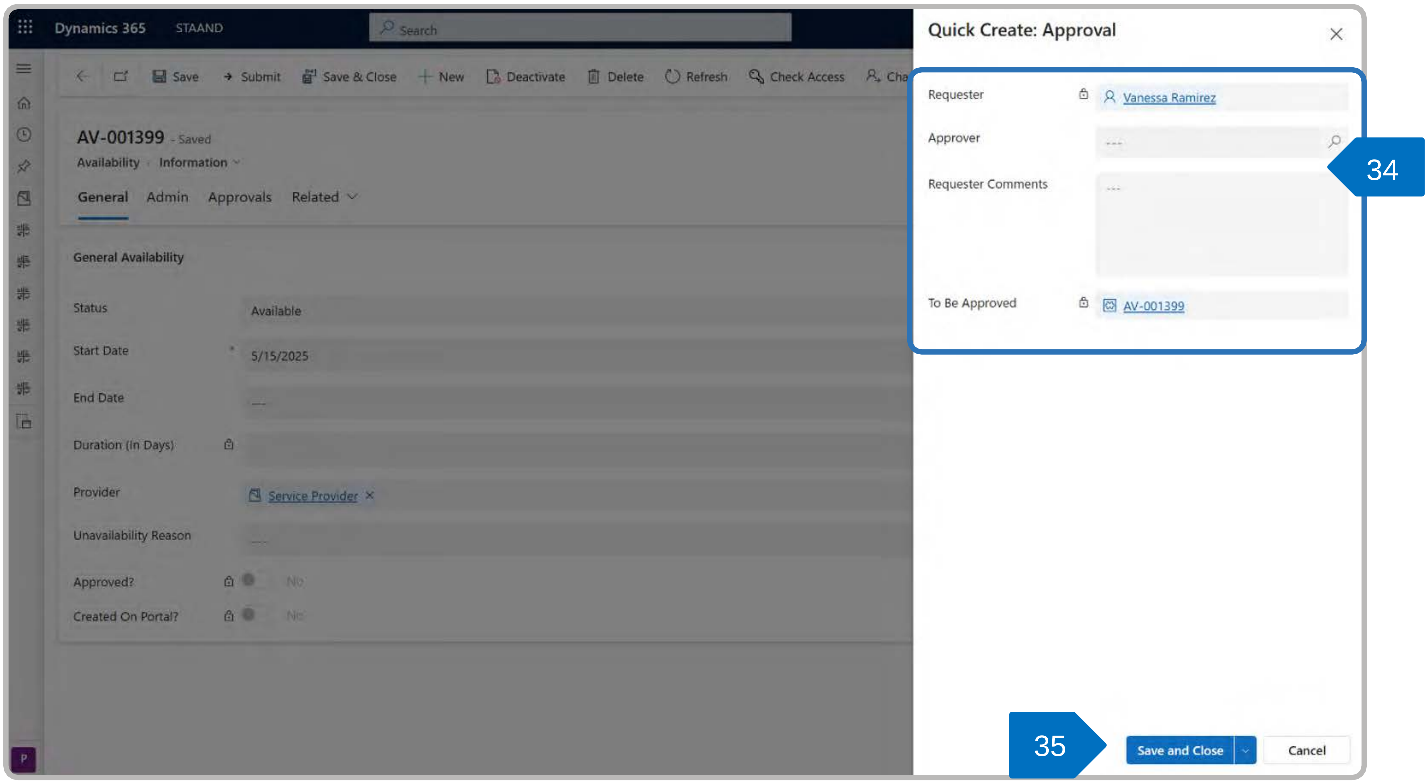
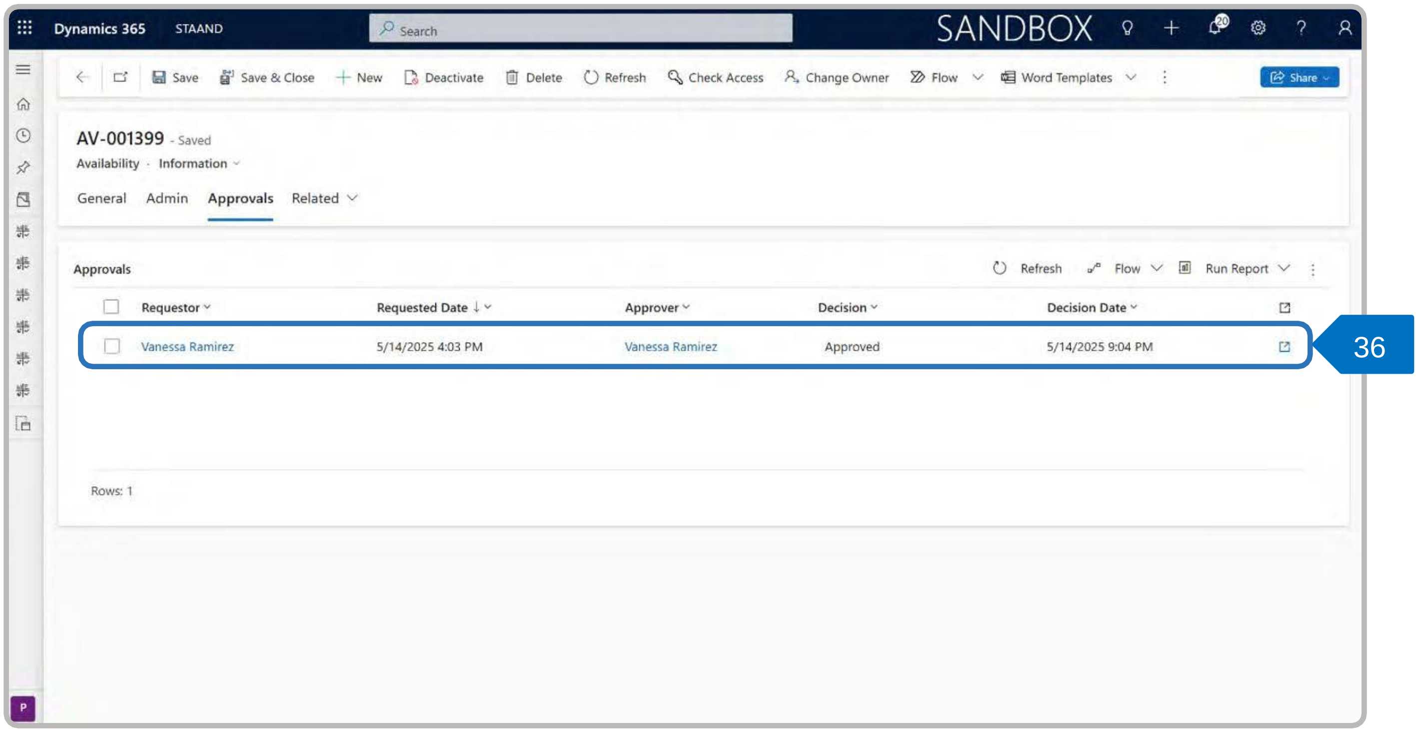
34. Complete all fields within the Quick Create: Approval window.

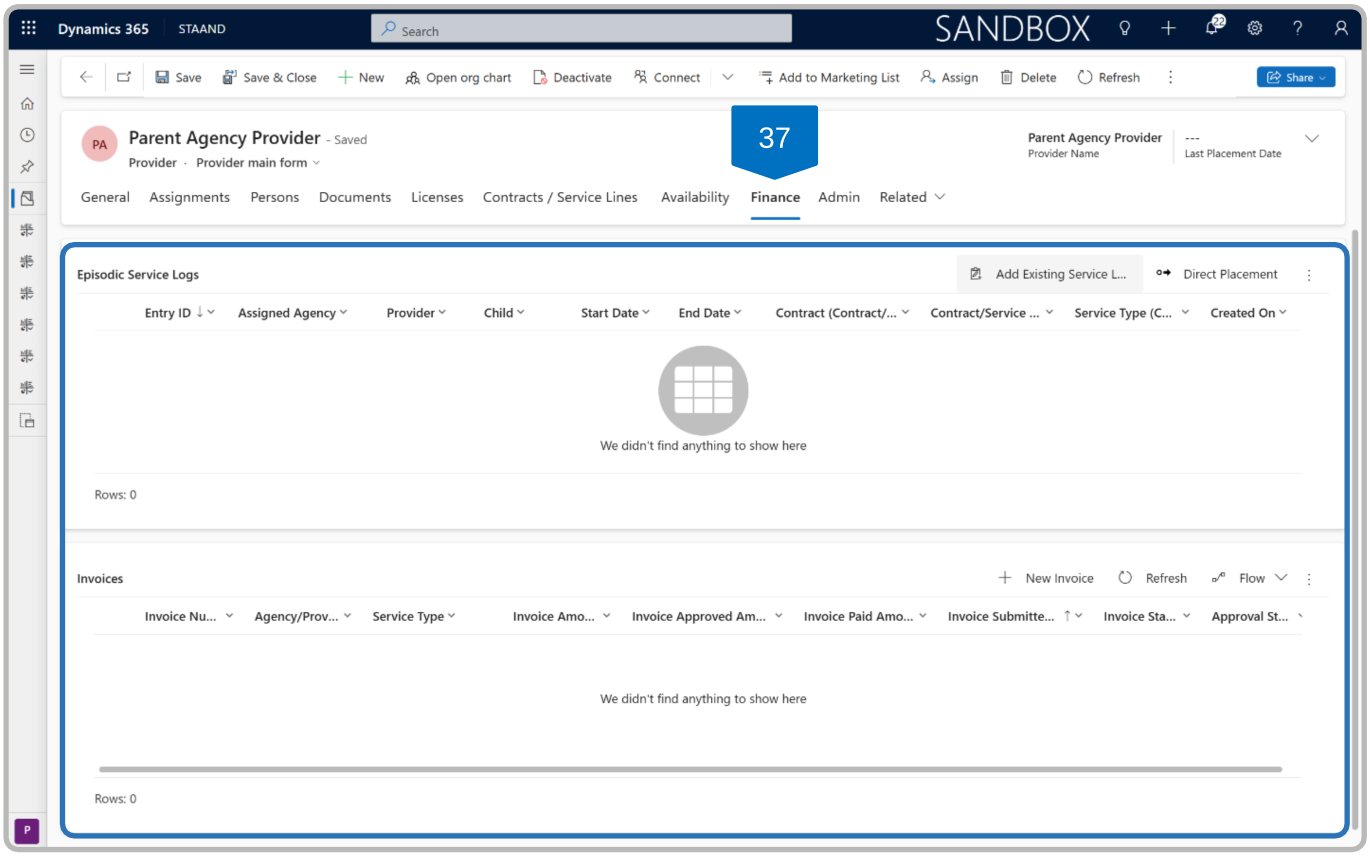
35. Select Save and Close. Once approved, availability will become active.



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

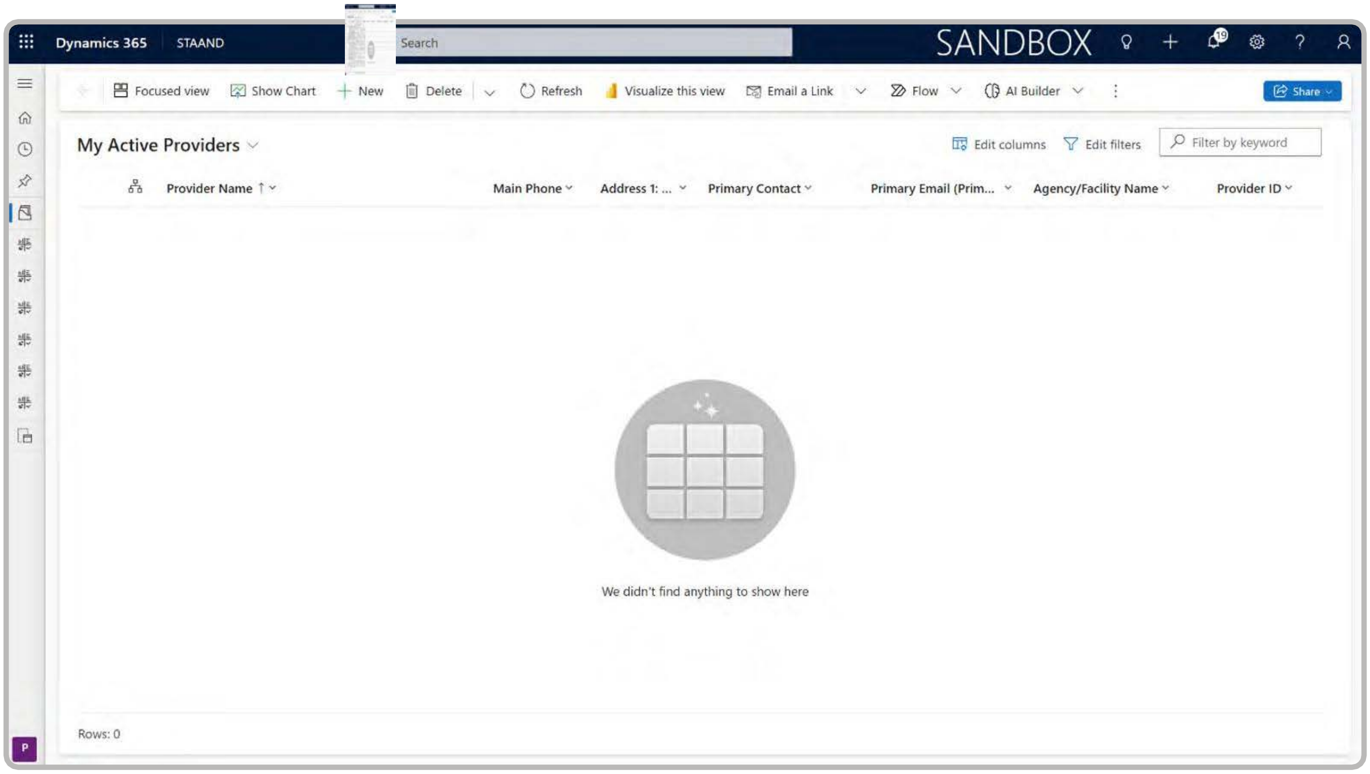


37. Any Invoices related to the Provider will populate in the Finance tab.

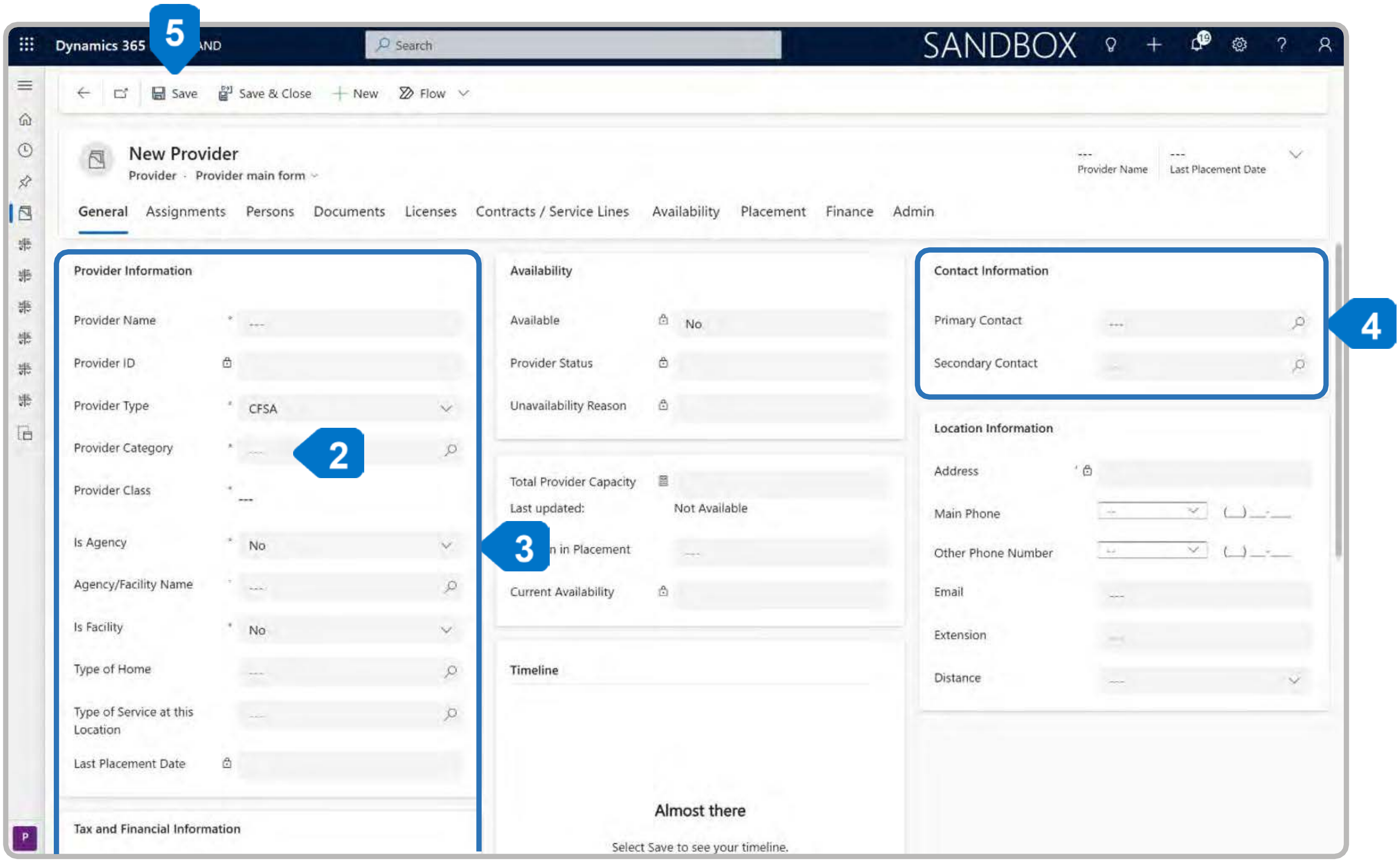


How To: Create a Placement Provider

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.

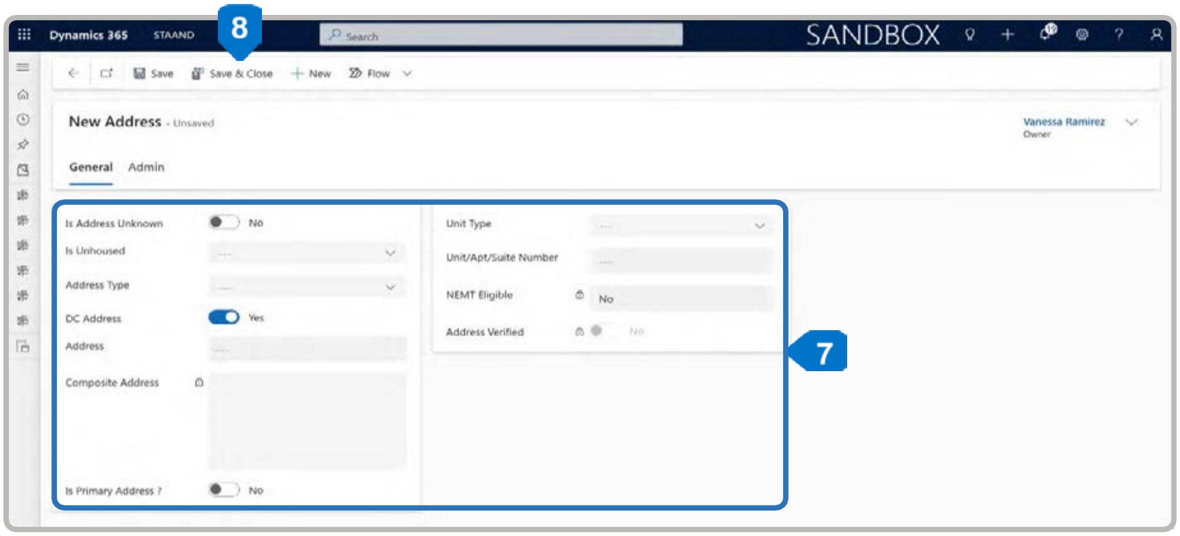


Note:

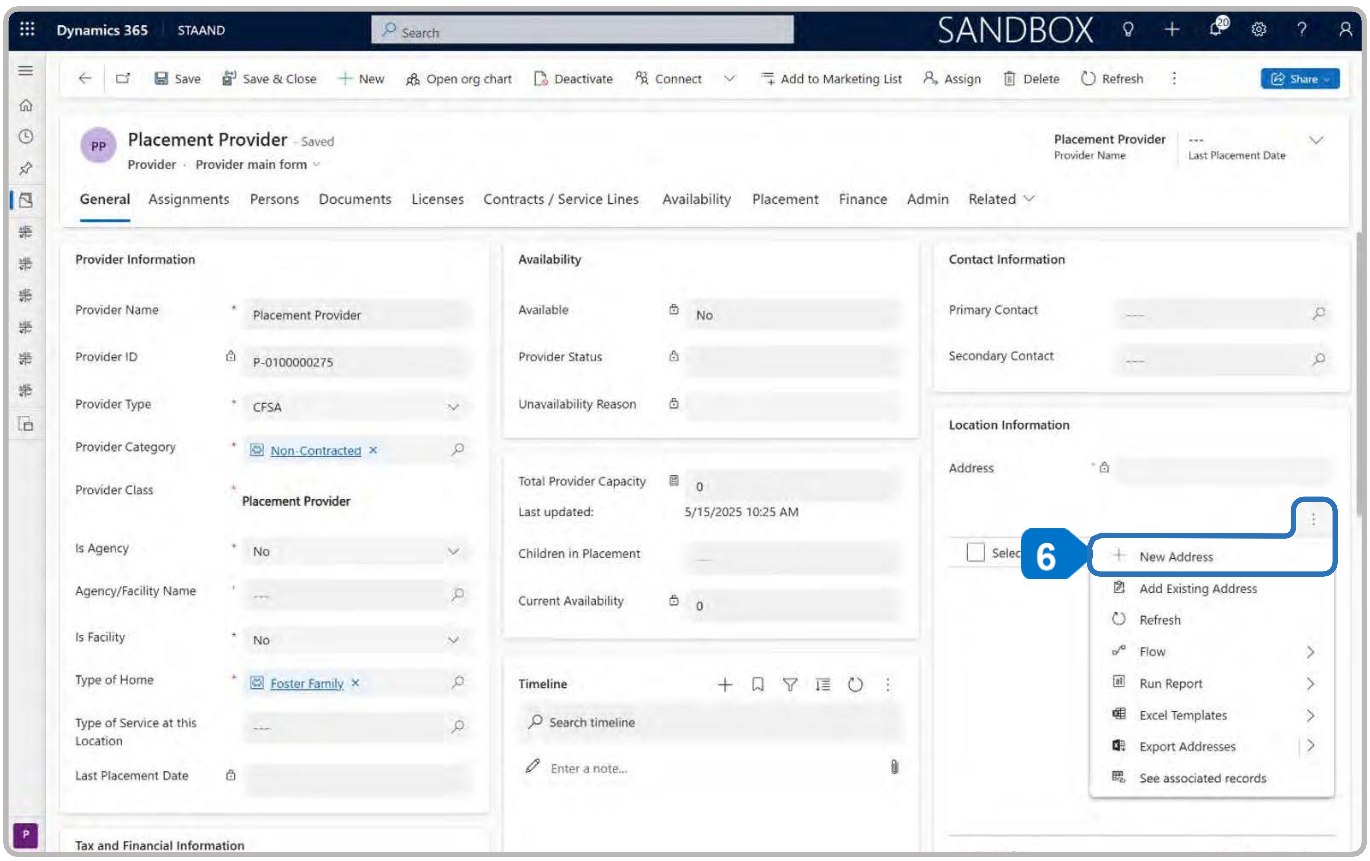
When selecting a Provider Category, a Provider can be classified as Contracted, Non-Contracted or both.

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.



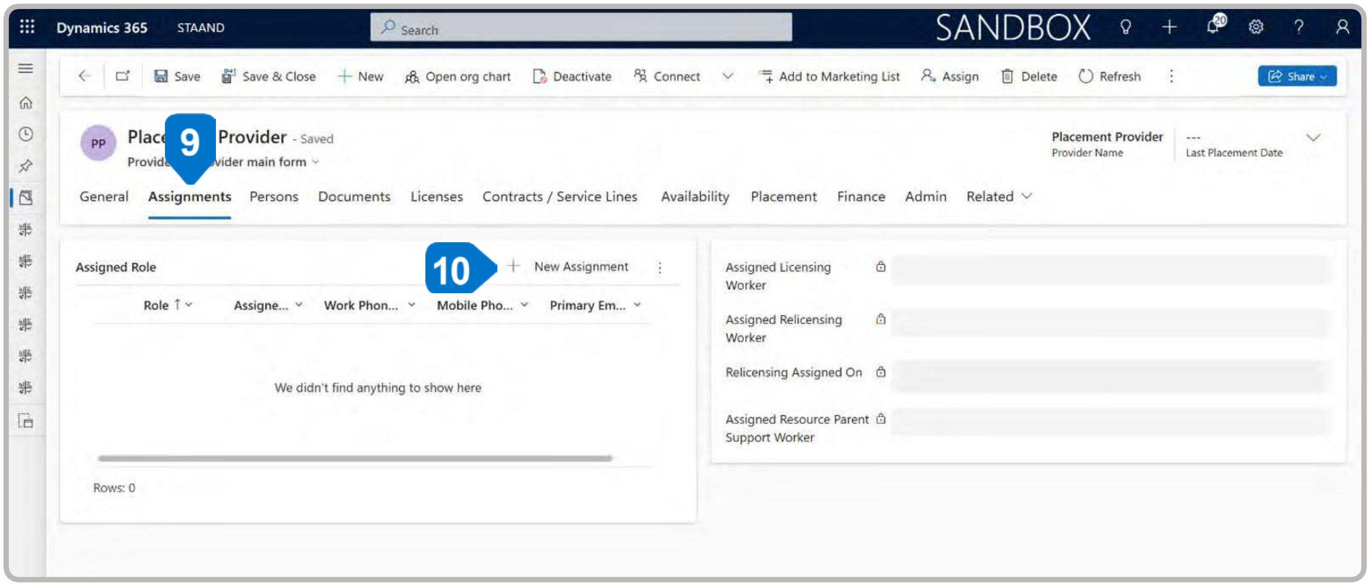
6. From the Location Information subgrid, select + New Address or Add Existing Address (if you added it to the person record already in step 4). If not visible, select the more commands icon to view more options.



7. Complete all fields.
8. 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.

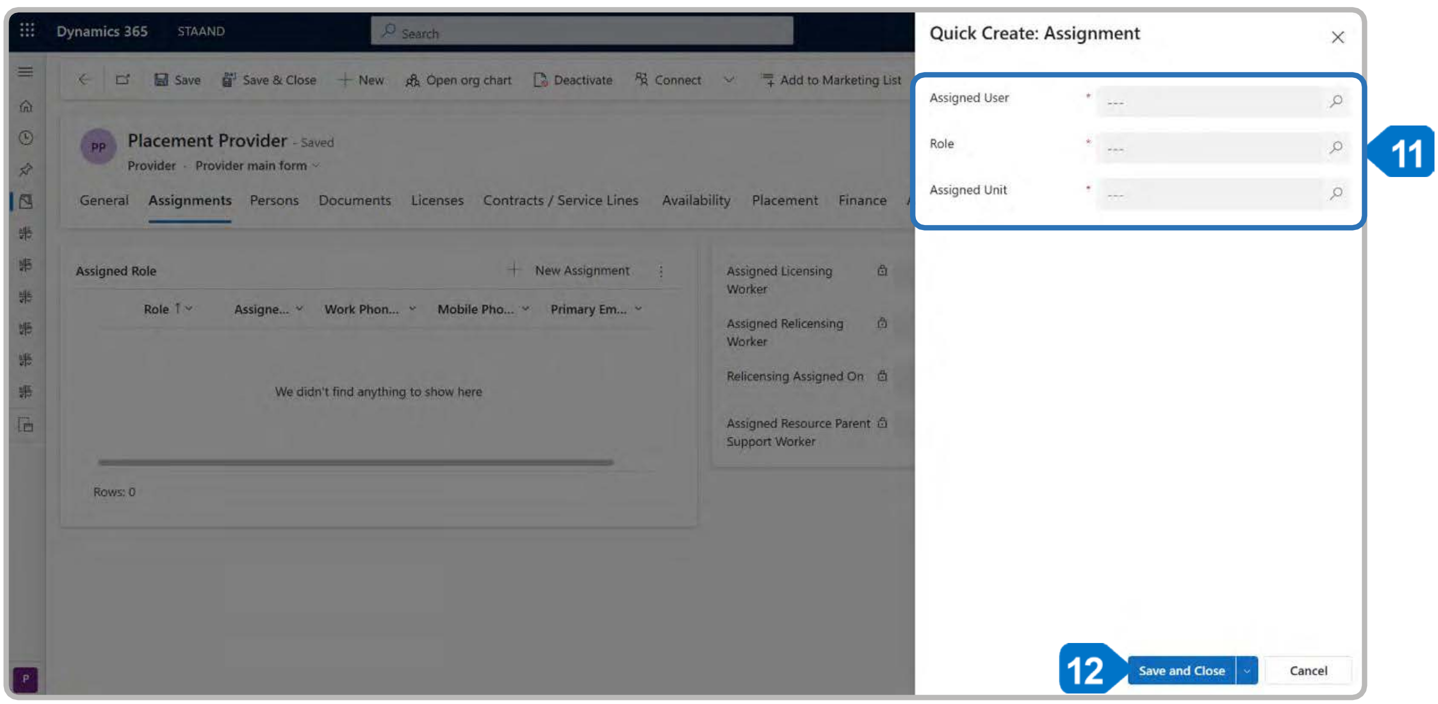
9. **To assign a Provider record to a STAAND user,** select the Assignments tab.

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.

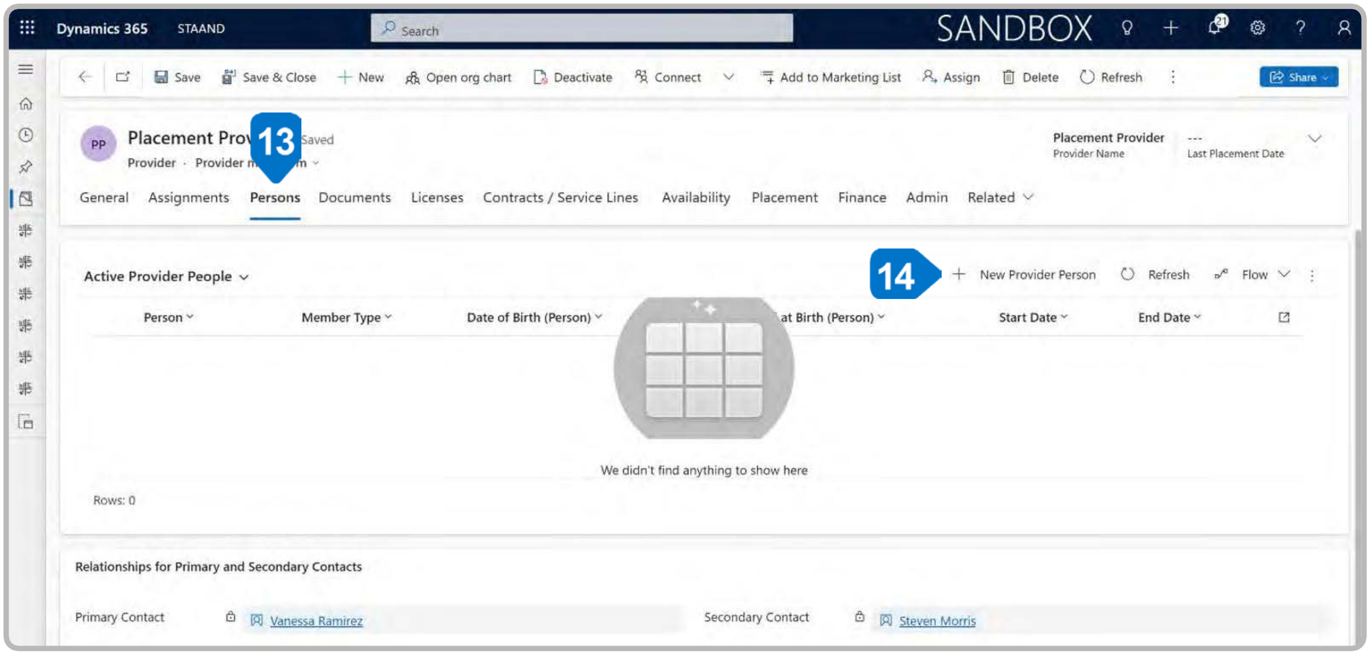


Important Tip:

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

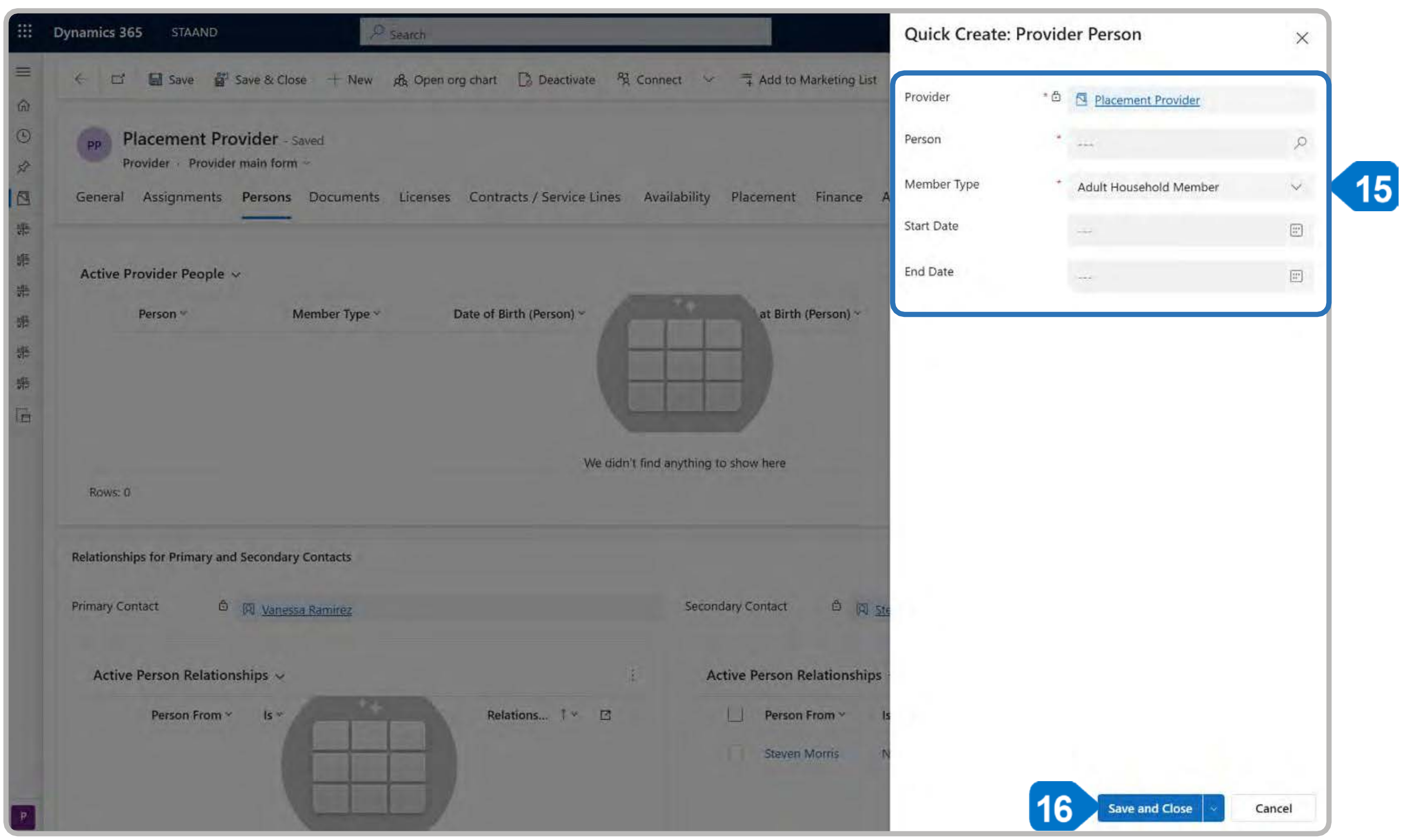
13. **To add Persons (ex. Back-up caregiver, household member, etc.) to a Provider record**, select the Persons tab.

14. Select + New Provider Person.



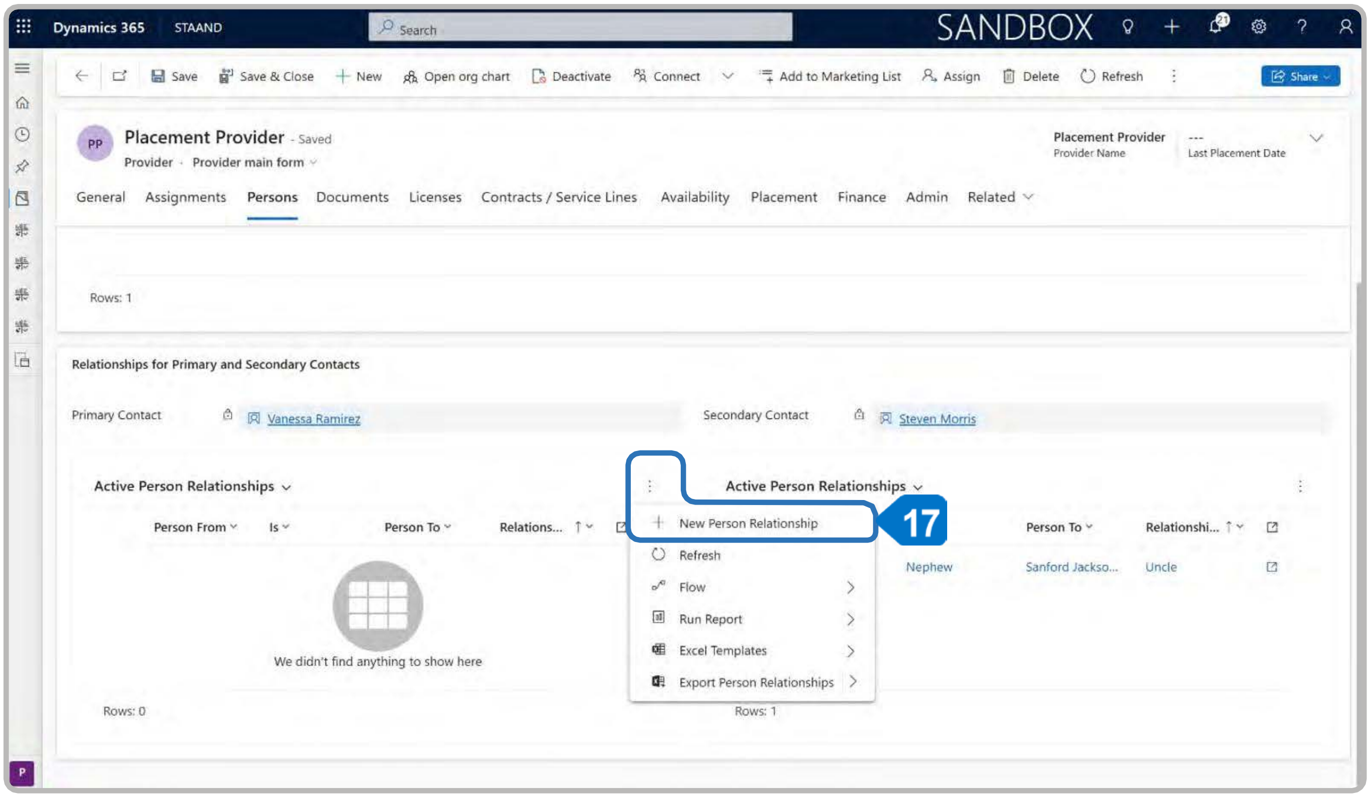
15. Complete all fields within the Quick Create: Provider Person window.

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.

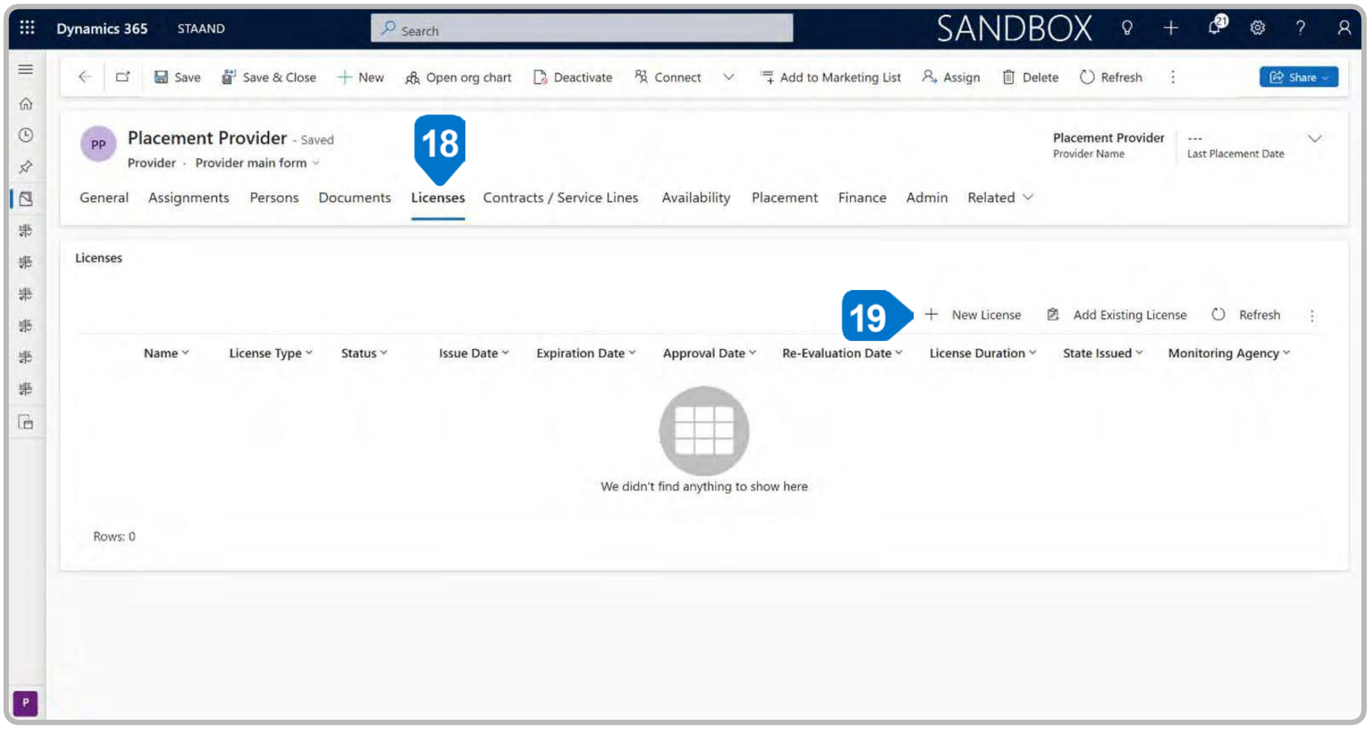


Important Tip:

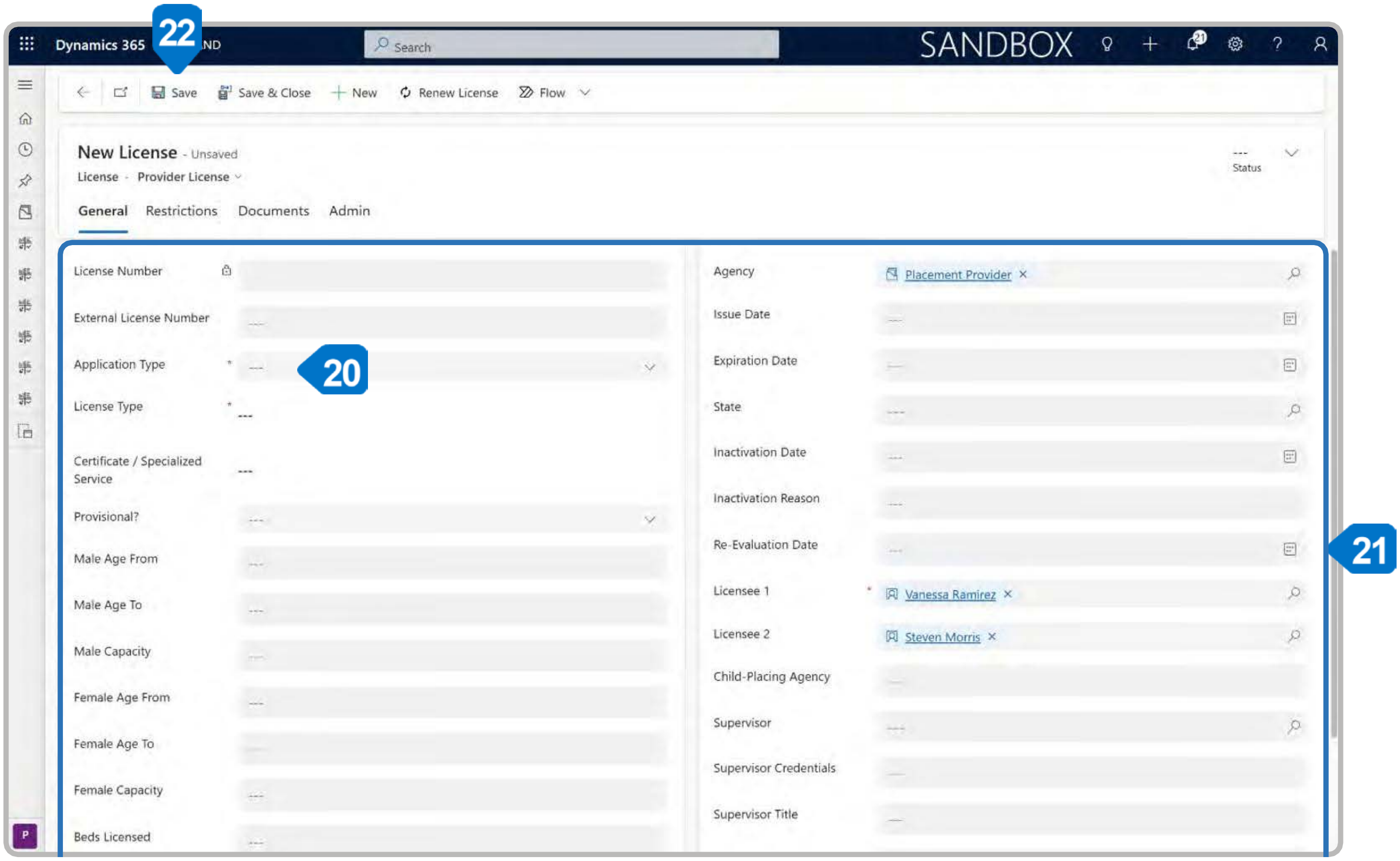
Adding a relationship for Primary and Secondary Contacts is not required and is at the discretion of User.

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

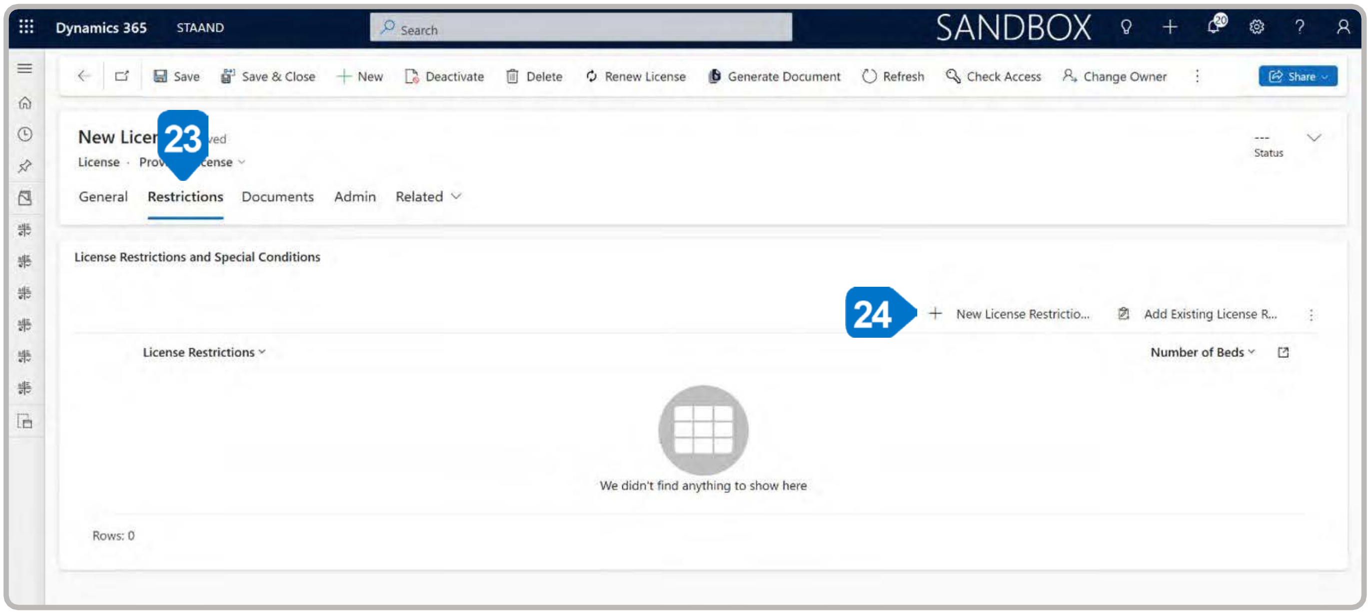
19. Select + New License.



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.



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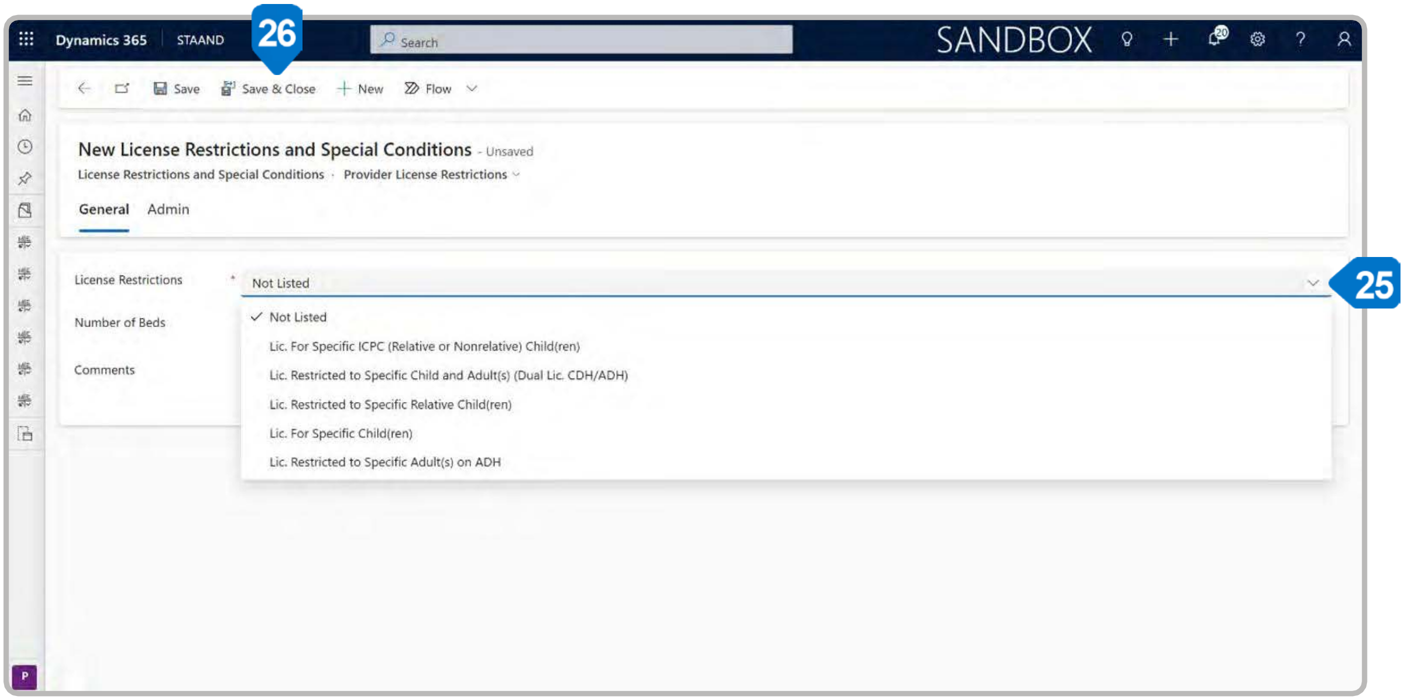
25. Select the License Restrictions from the dropdown menu and complete all necessary information.

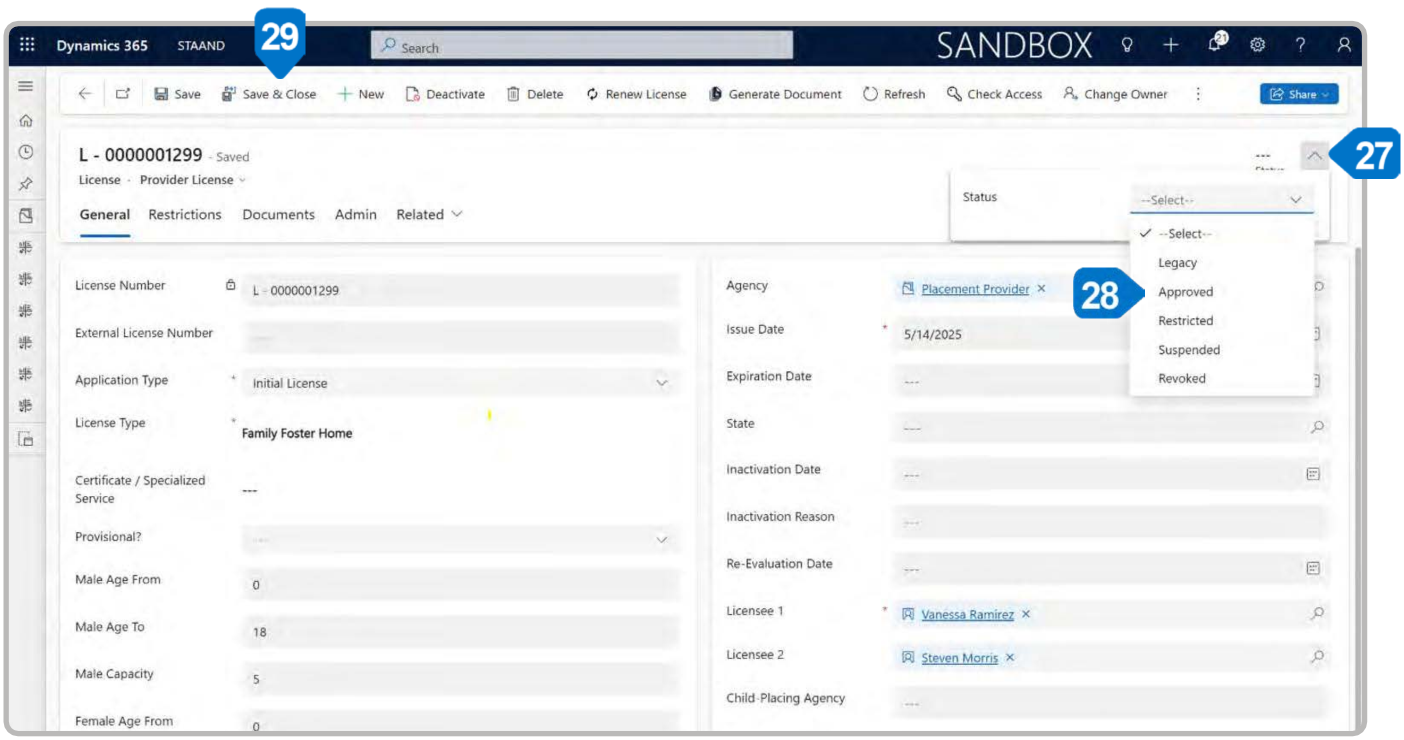
26. Select Save & Close.



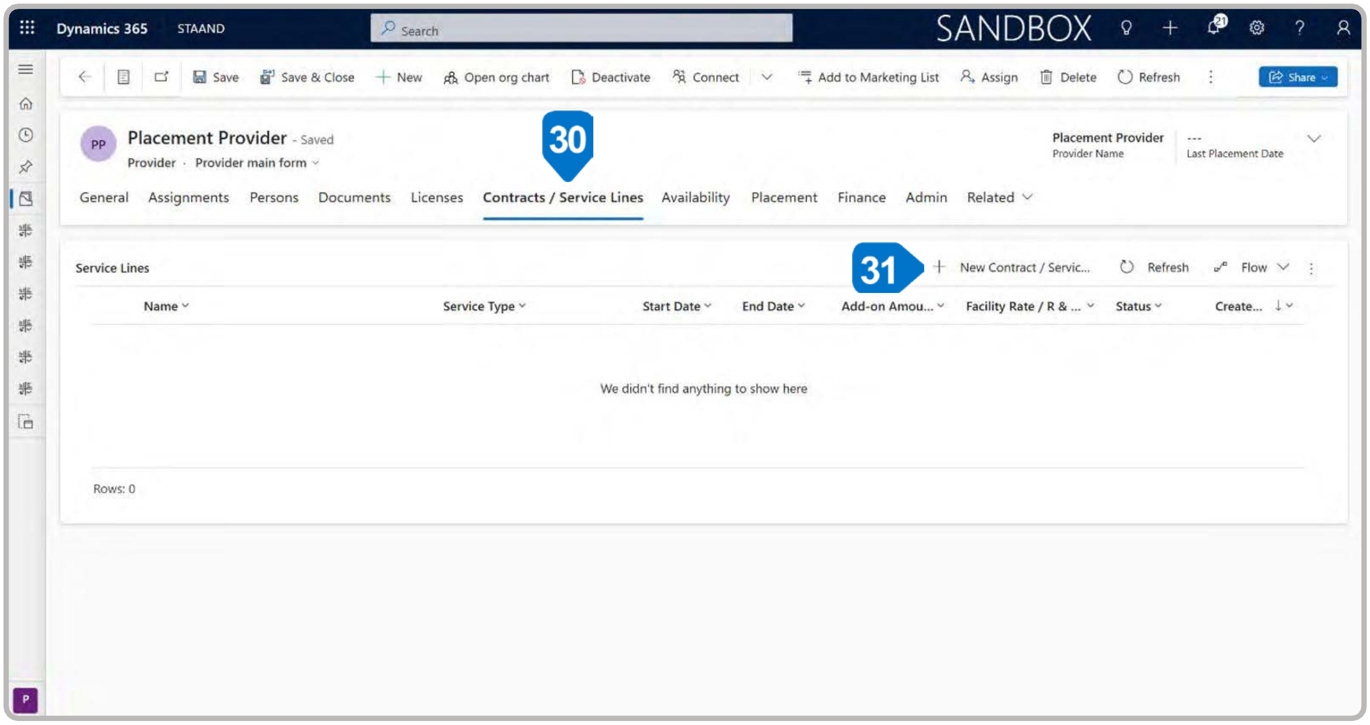
27. Select the caret to populate the status dropdown menu.

28. Select Approved from the dropdown menu in the top right corner.

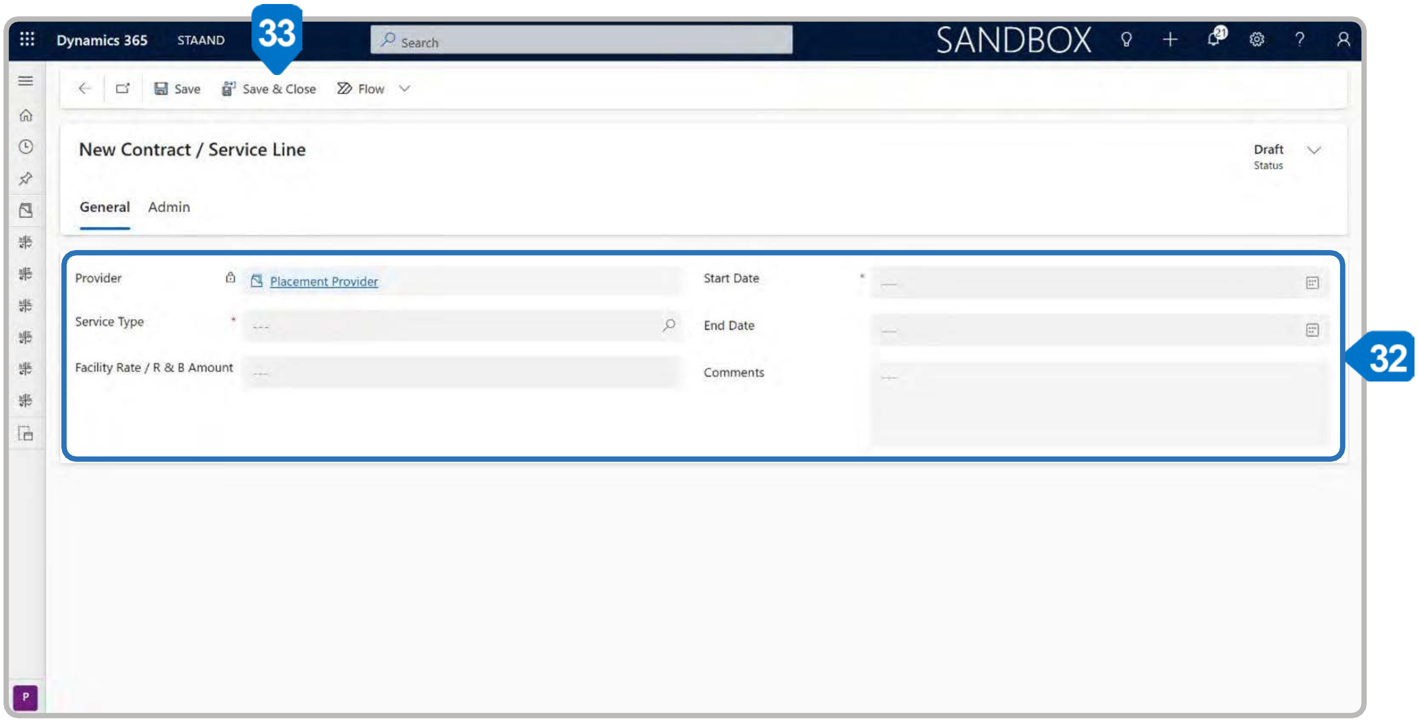
29. Select Save & Close to return to the Provider record.



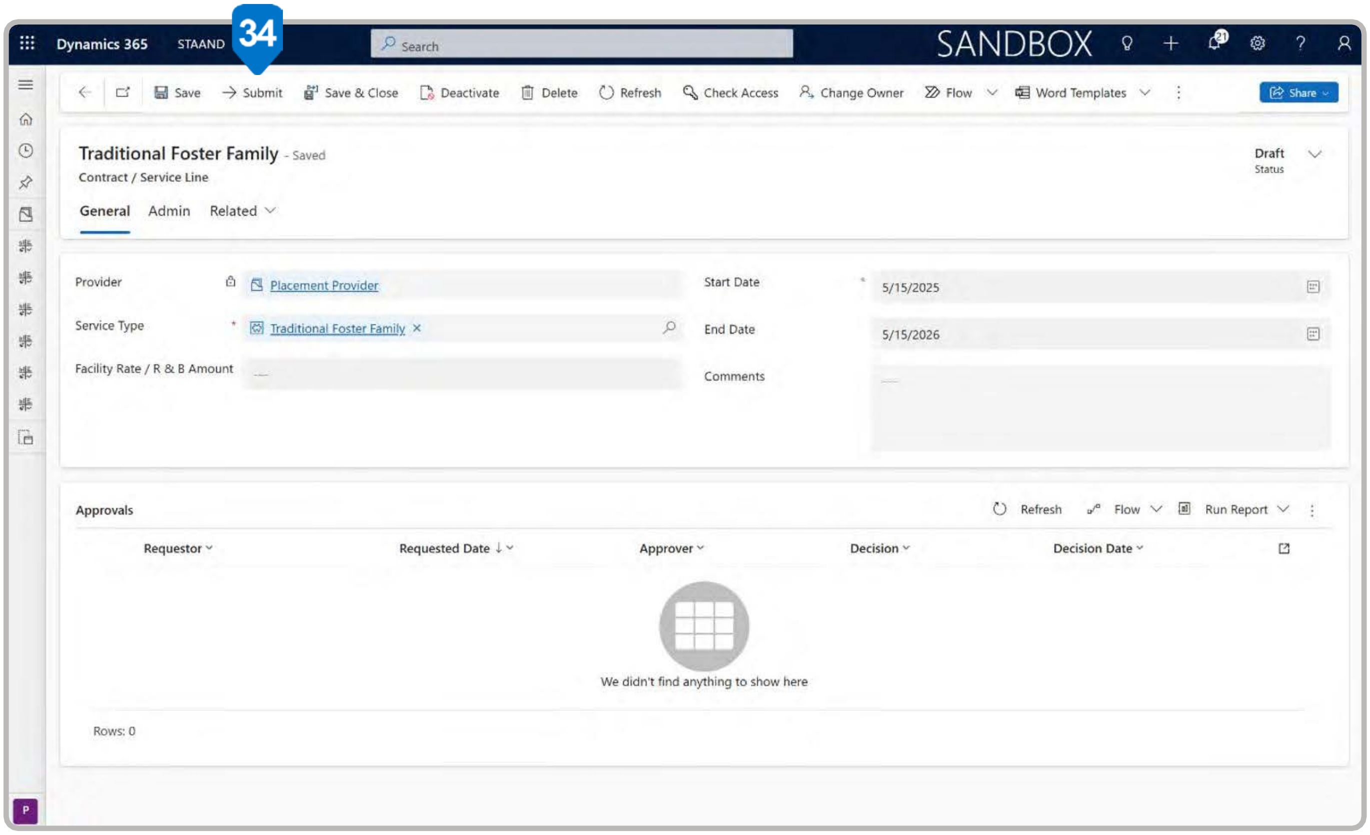
30. **To add Contracts/Services information**, select the Contracts/Service Lines tab.
31. To add a new contract, select + New Contract.



32. Complete all fields including Service Type, Start Date and End Date.
33. Select Save & Close.

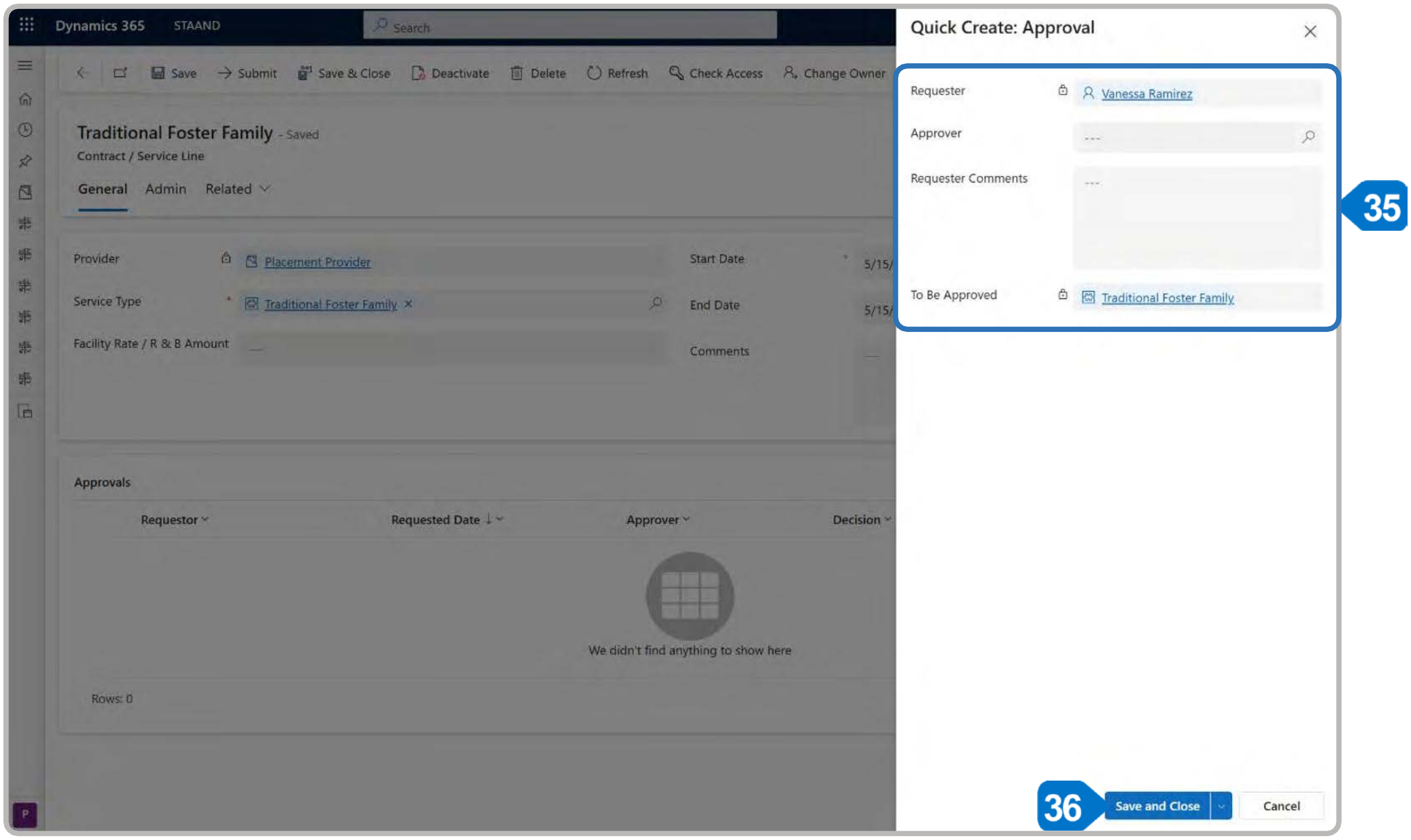


34. Select Submit to submit the record for approval.



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

36. Select Save and Close.

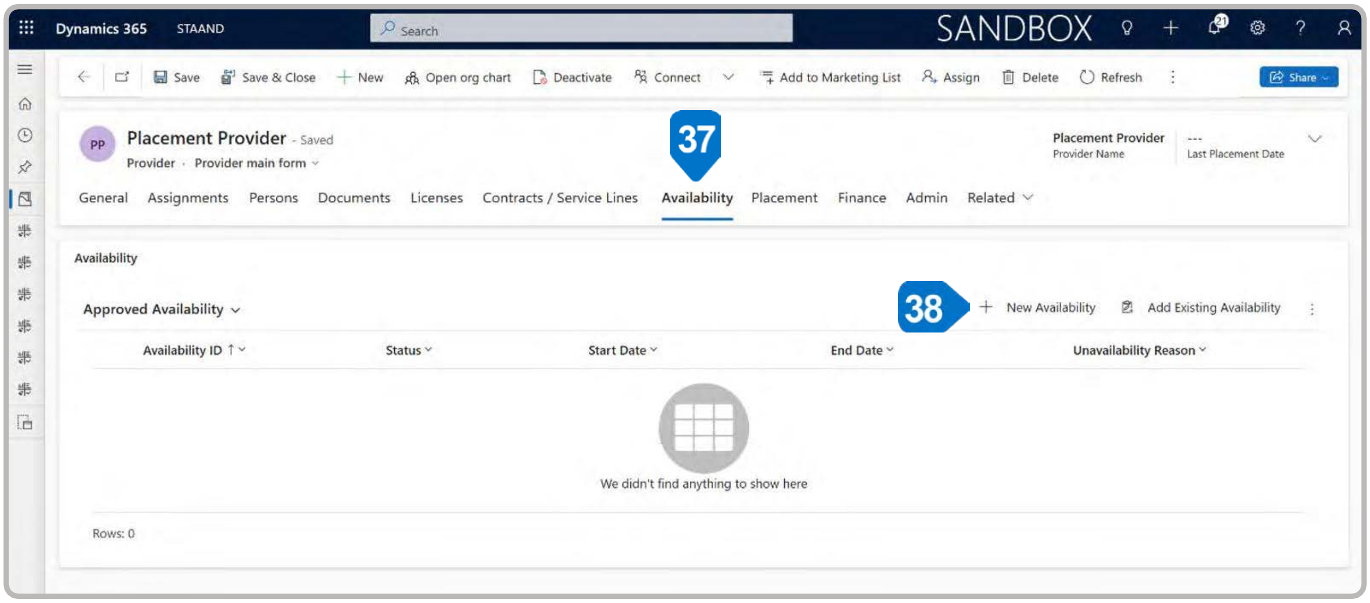


Note:

To approve, please refer to **How To: Approve Provider Records** on page 61.

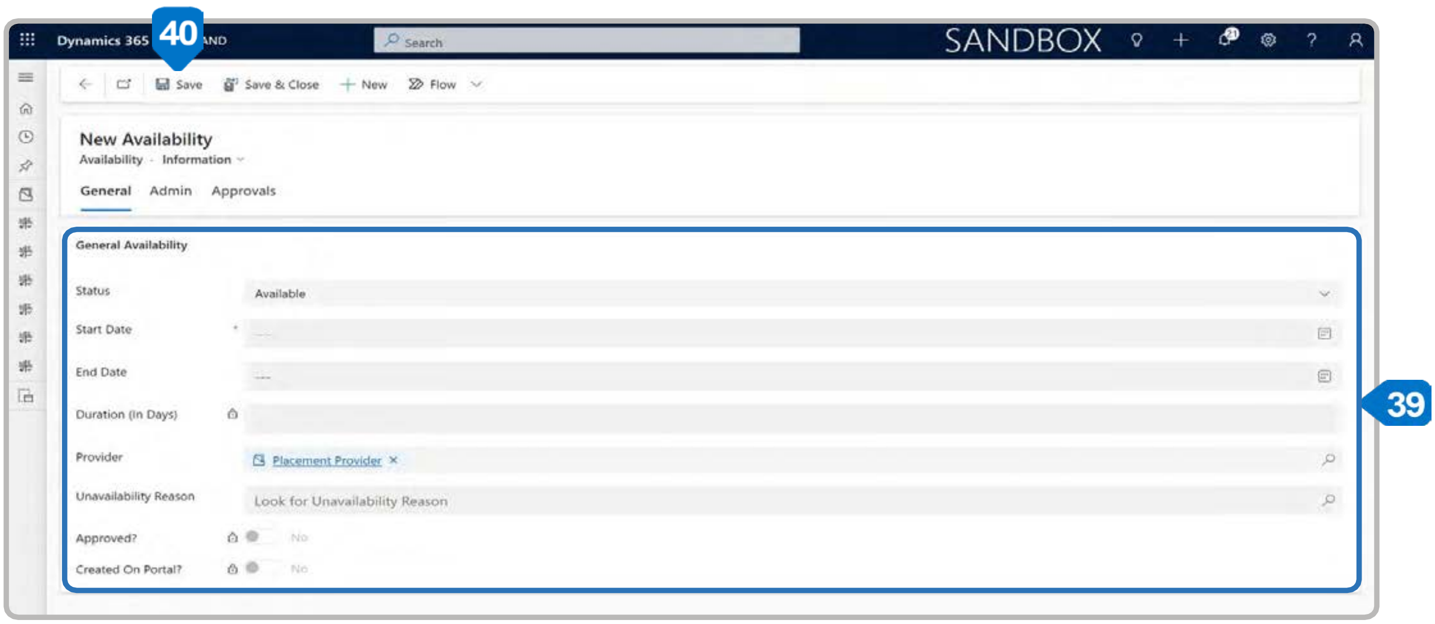
37. After approval, select the Availability tab within the Provider record to add new availability.

38. Select + New Availability.



39. Complete all fields including Status and Start Date.

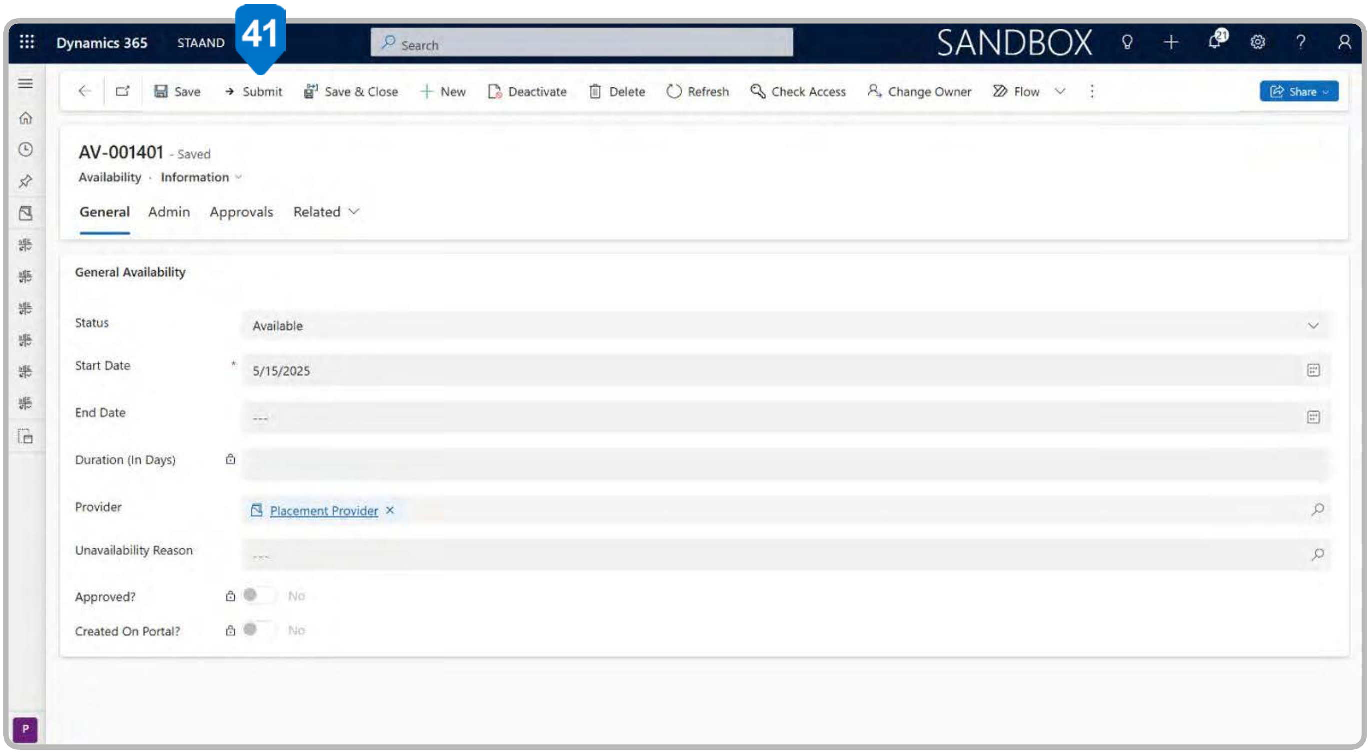
40. Select Save.



Note:

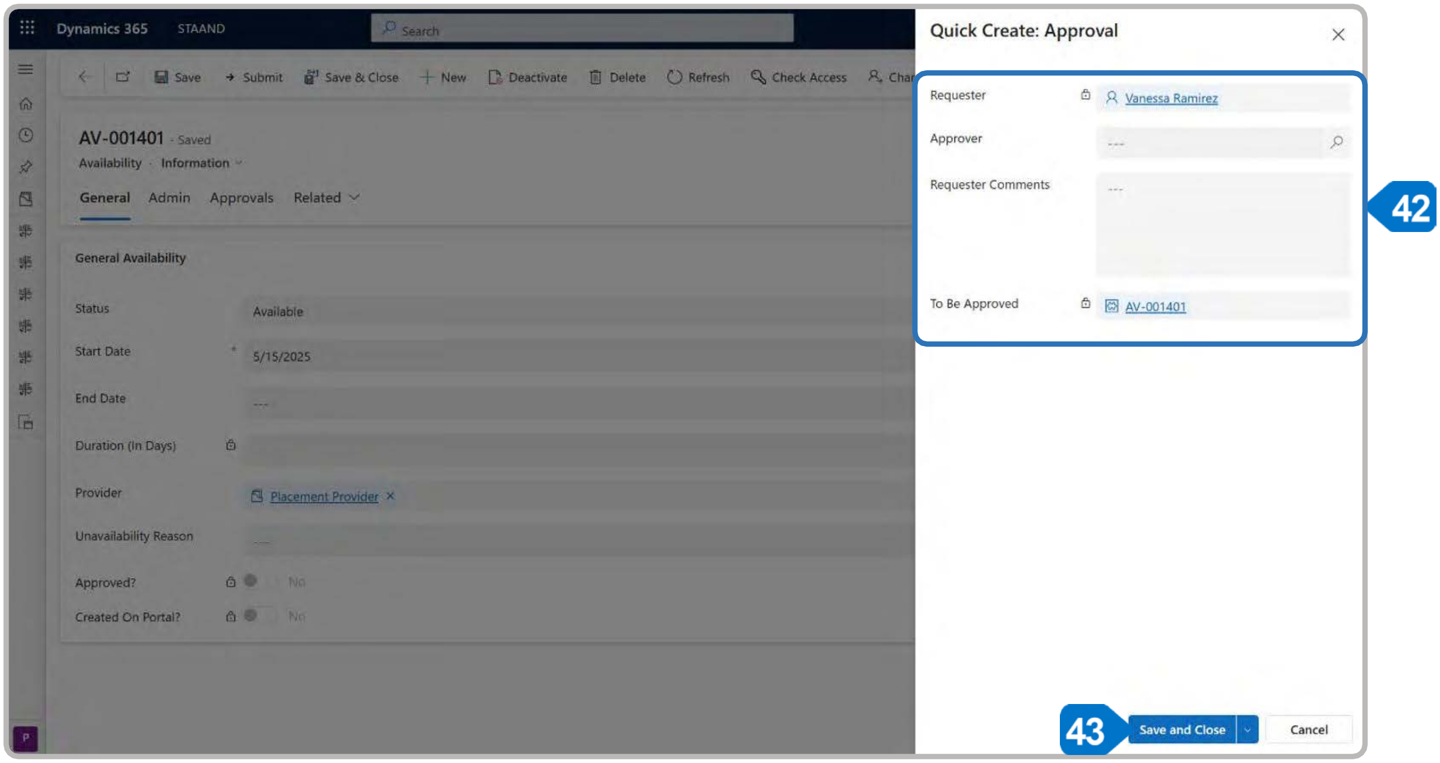
If an End Date is selected, the User will then need to select an Unavailability Reason from the dropdown menu.

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



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

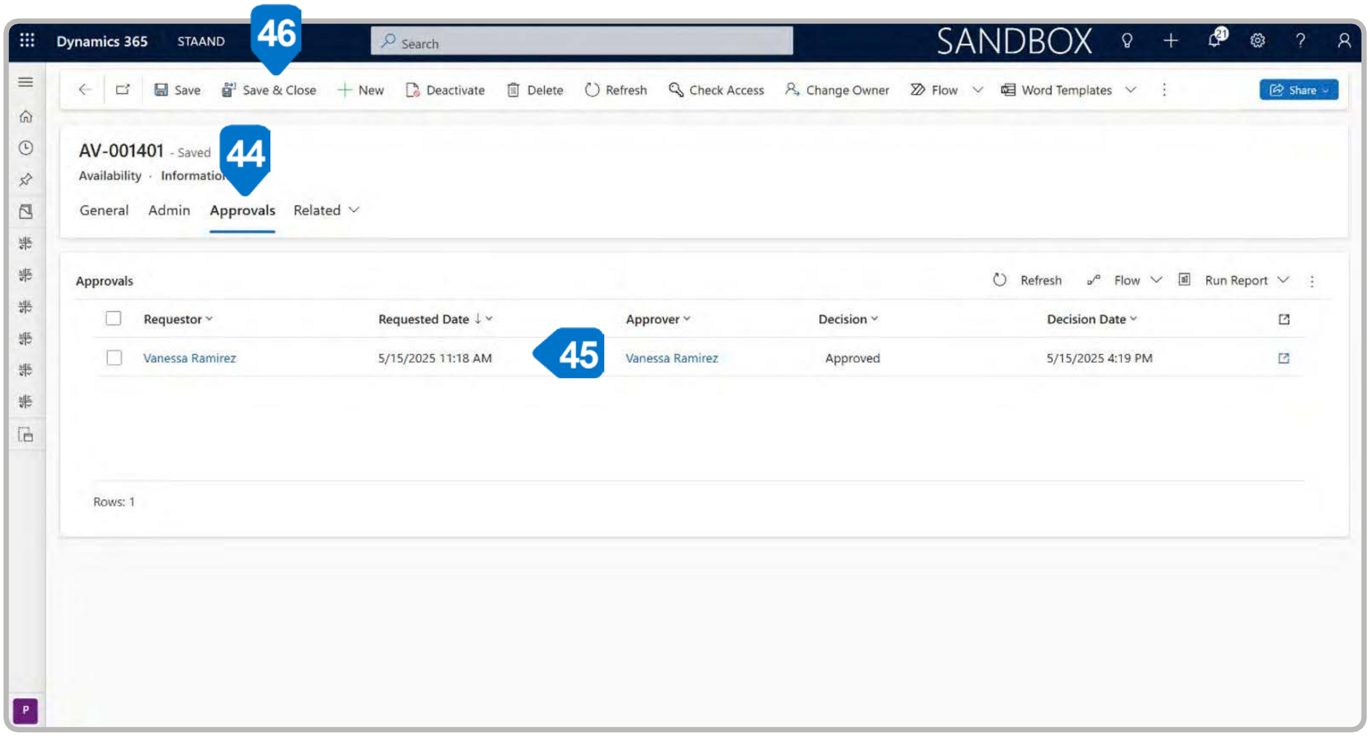
43. Select Save and Close.



Note:

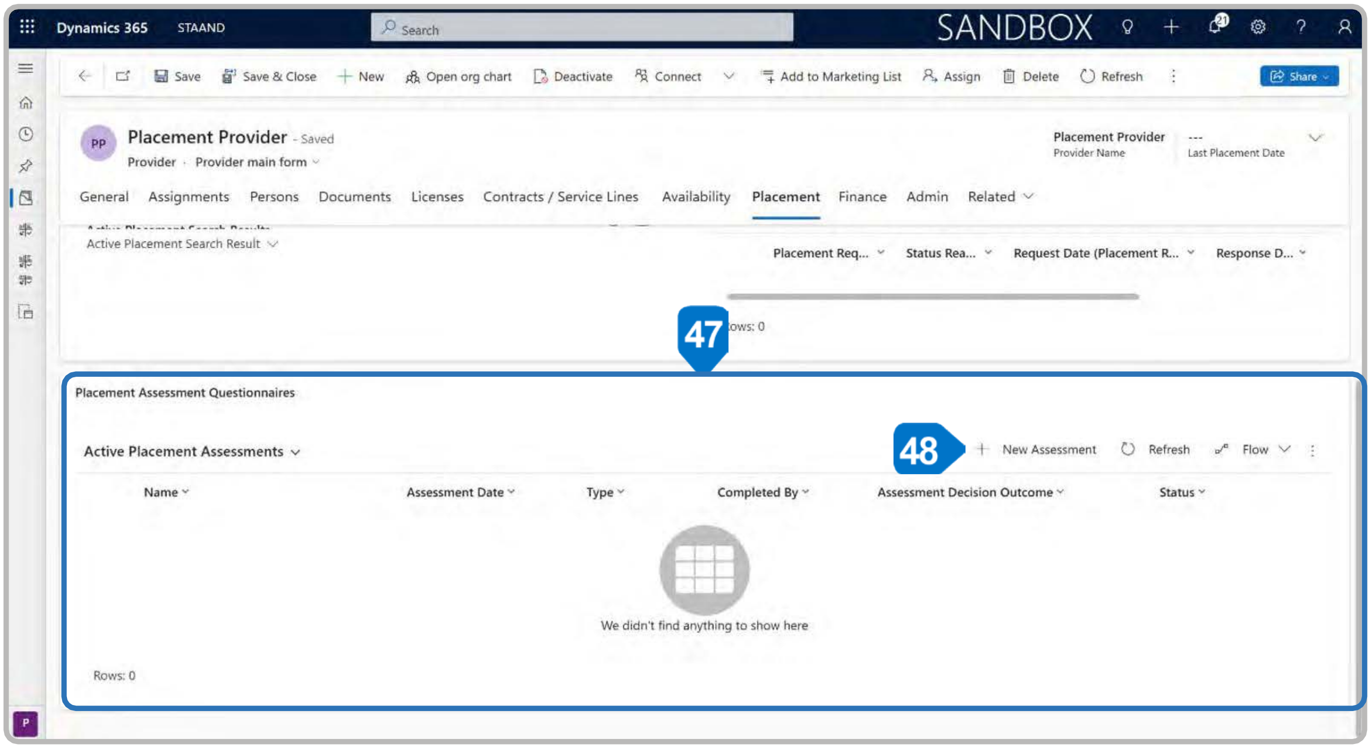
To approve, please refer to **How To: Approve Provider Records** on page 61.

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



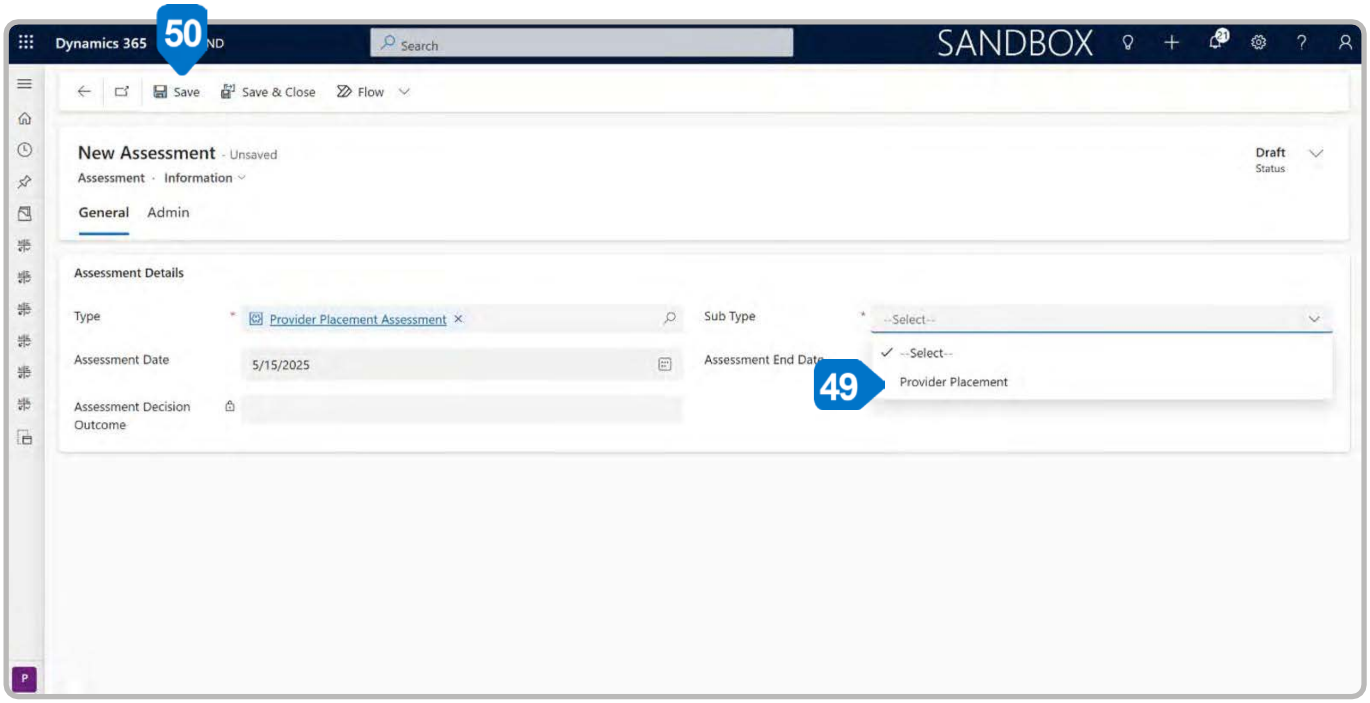
47. **To add a new Provider Questionnaire** that is used to match placement providers with children in need of a placement, from the Provider record, navigate to the Placement Assessment Questionnaires subgrid within the Placement tab.

48. Select + New Assessment.

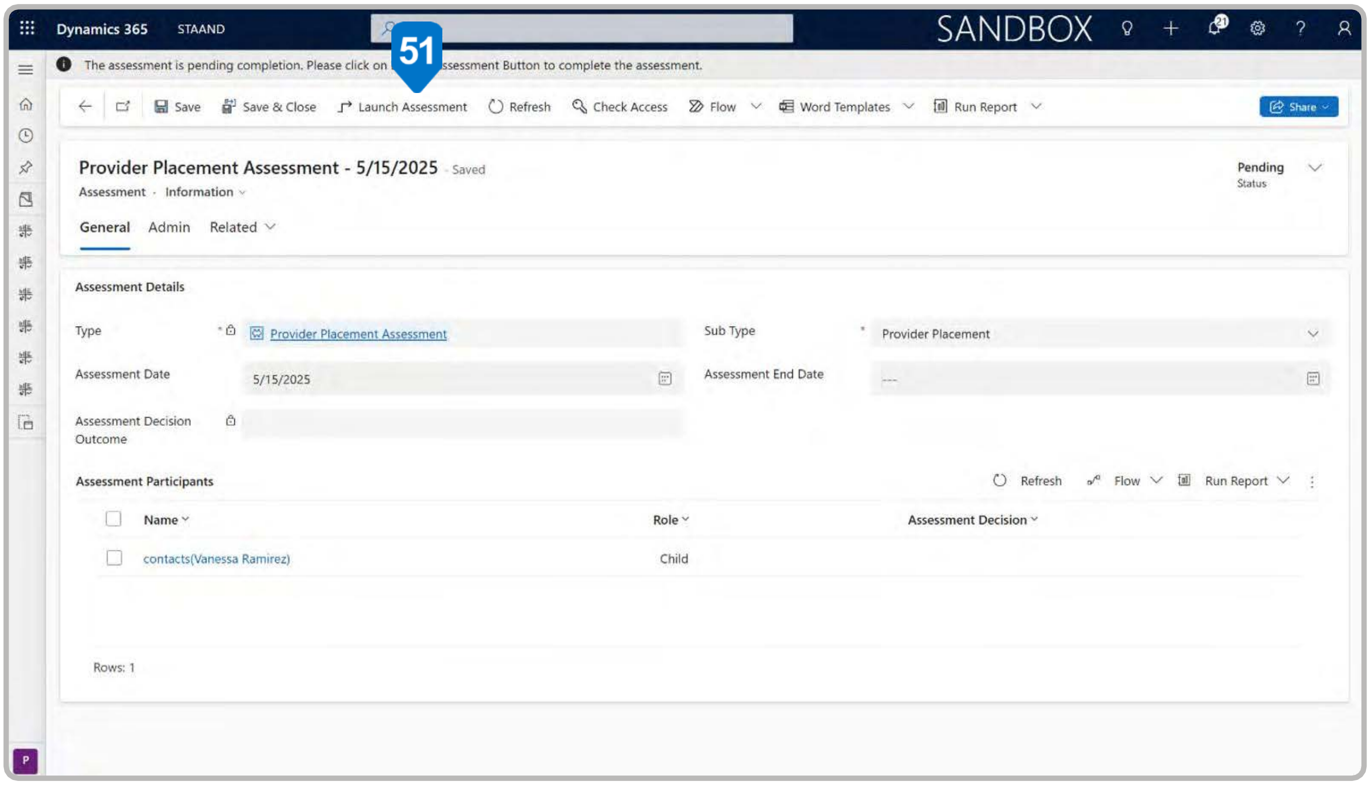


49. Select Provider Placement for the Sub Type.

50. Select Save.

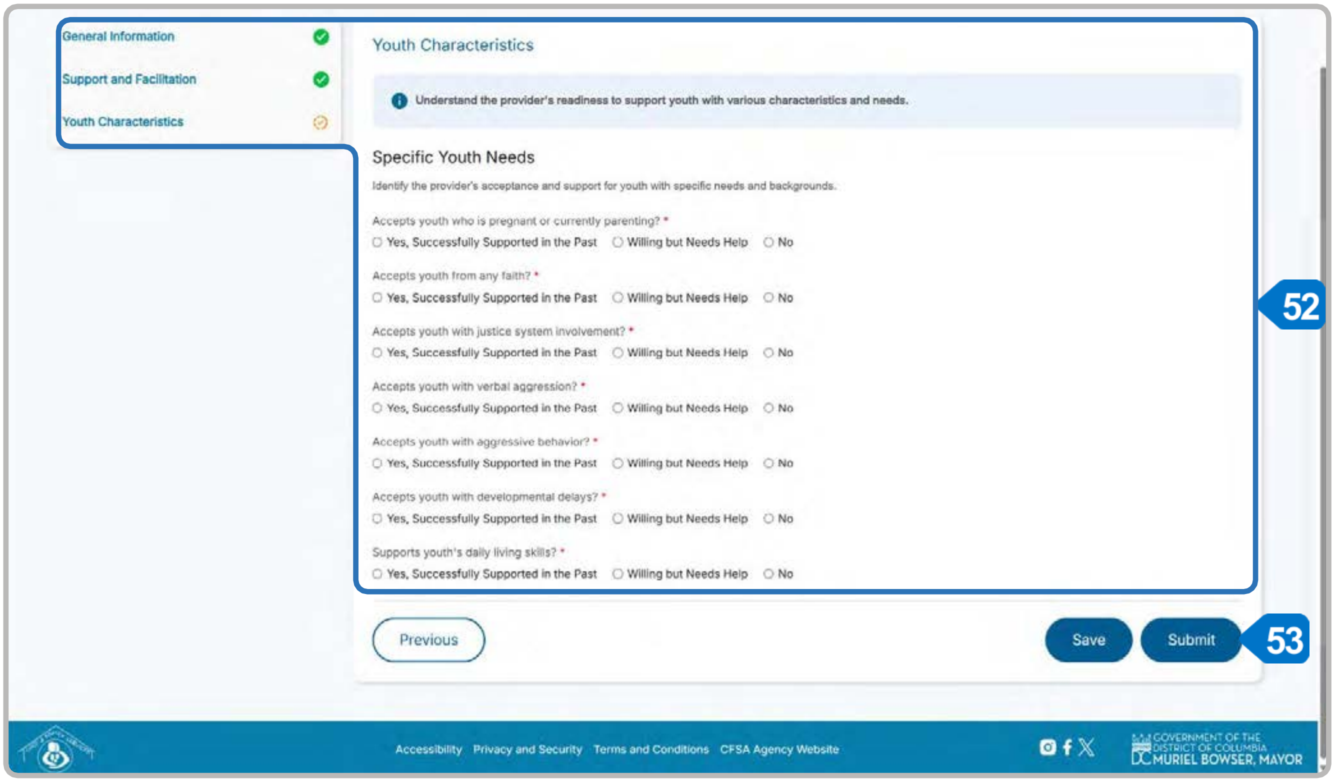


51. Select Launch Assessment. Note: if the Launch Assessment button does not show immediately, save or refresh the page.

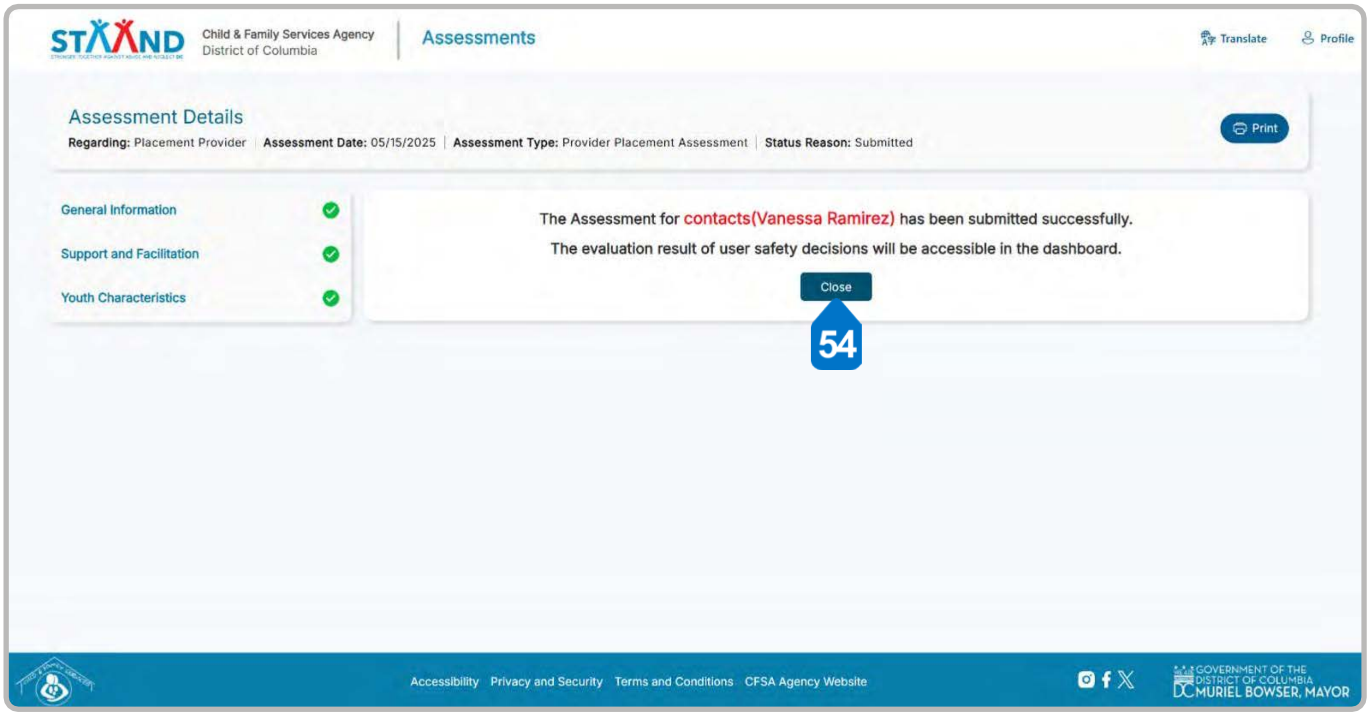


52. Answer all questions within the questionnaire.

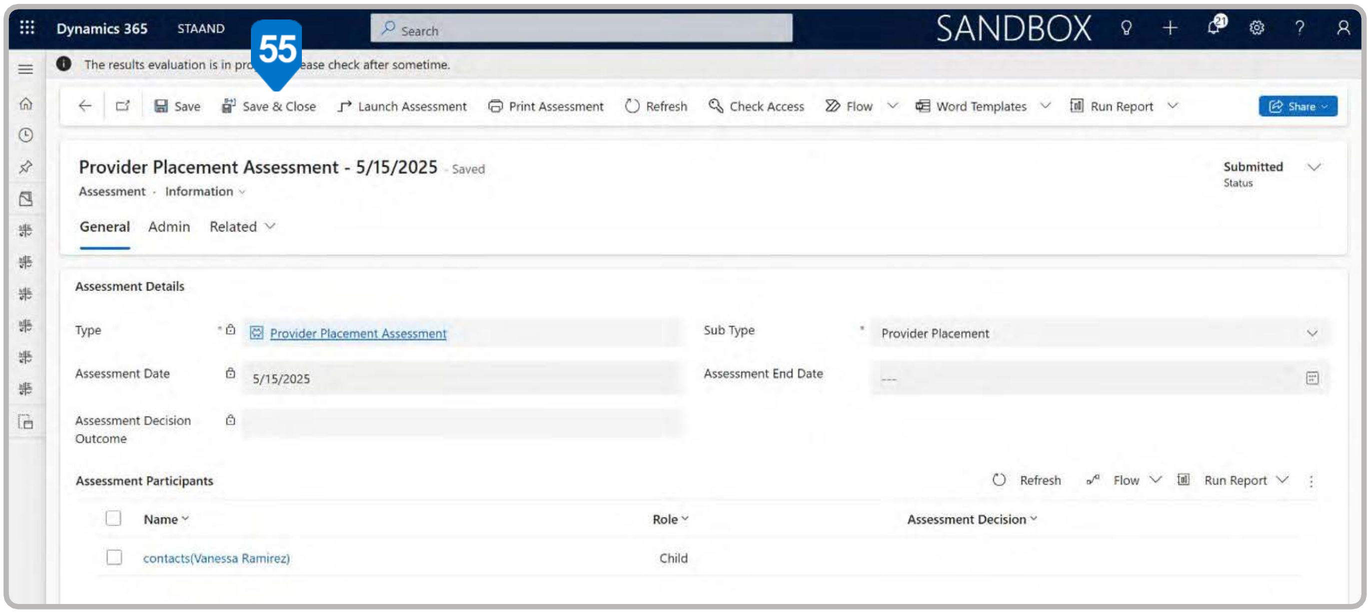
53. Once completed select Submit.



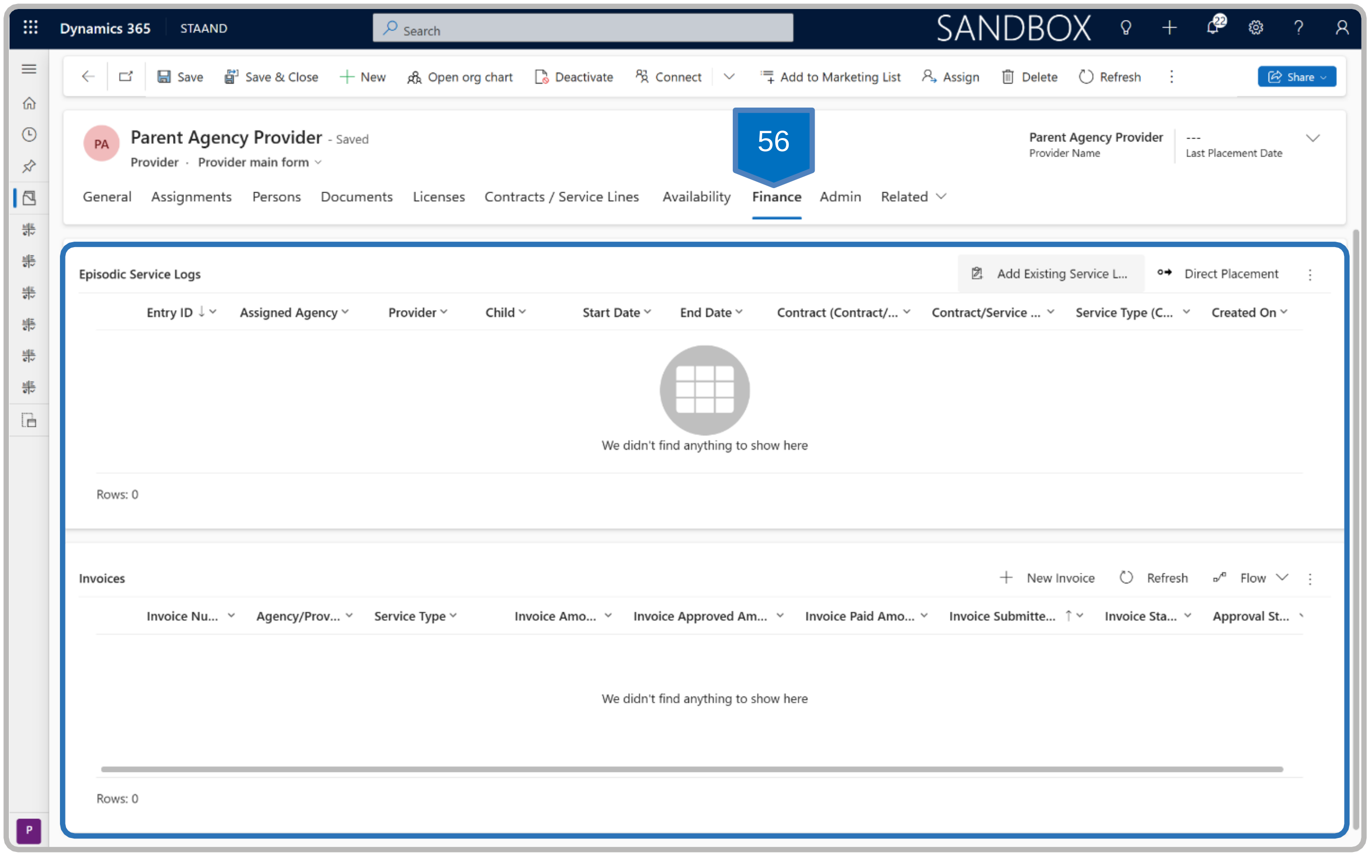
54. Select Close to return to the STAAND application.



55. Select Save & Close.



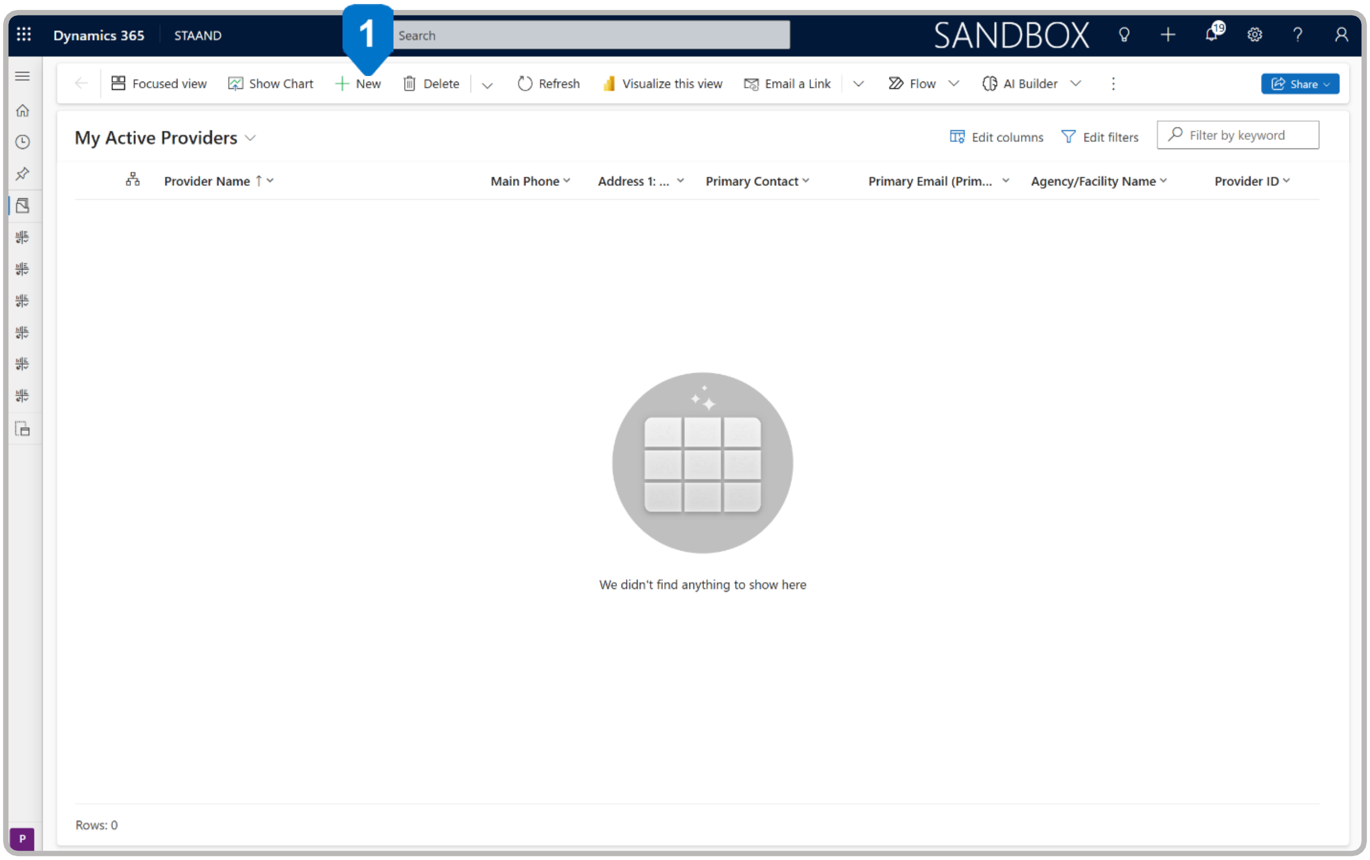
56. Any Invoices related to the Provider will populate in the Finance tab.


Dynamics 365
STAAND
Search
SANDBOX
Save
Save & Close
New
Open org chart
Deactivate
Connect
Add to Marketing List
Assign
Delete
Refresh
Share
Parent Agency Provider - Saved
Provider · Provider main form
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

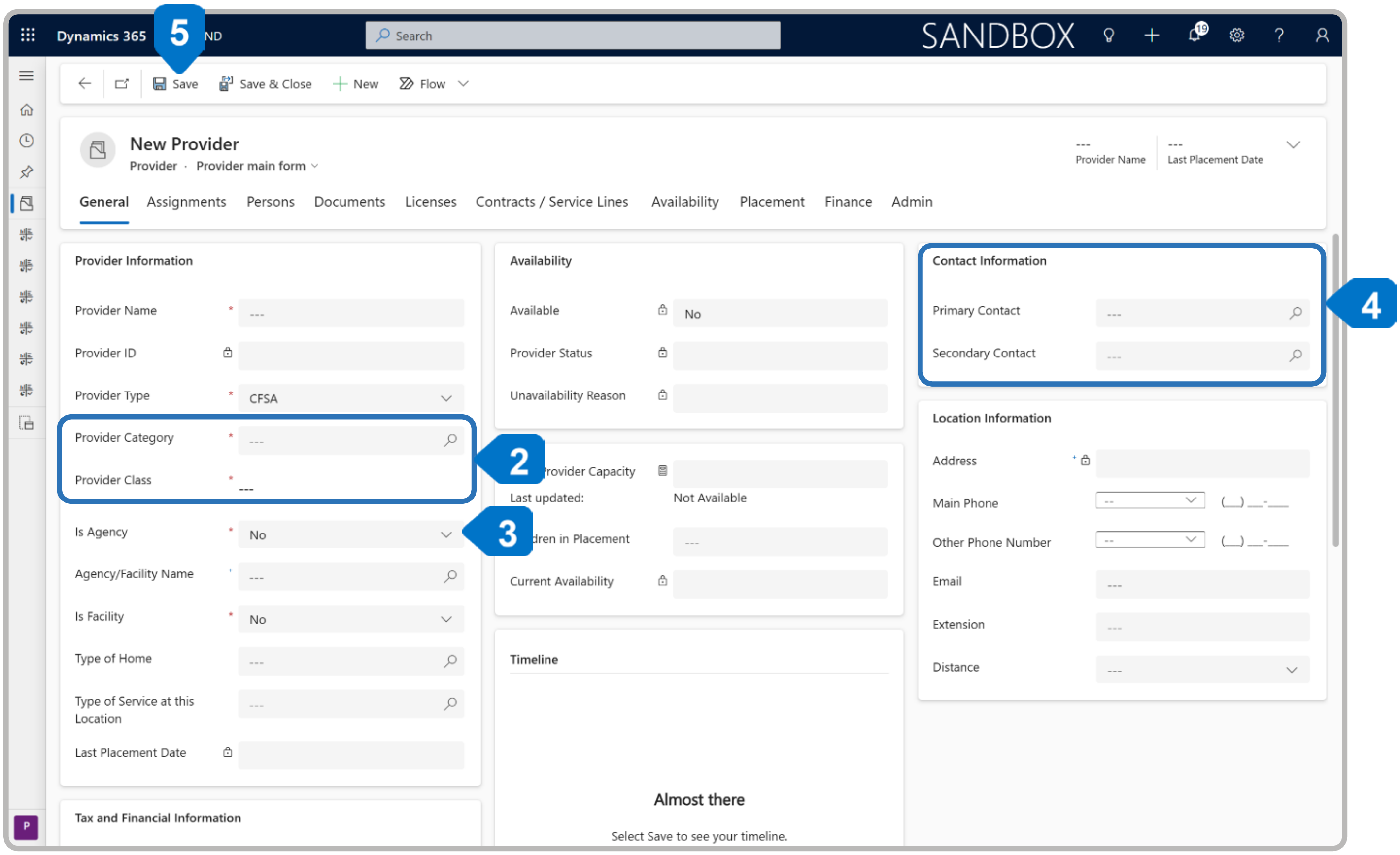
How To: Create an Agency Provider

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.

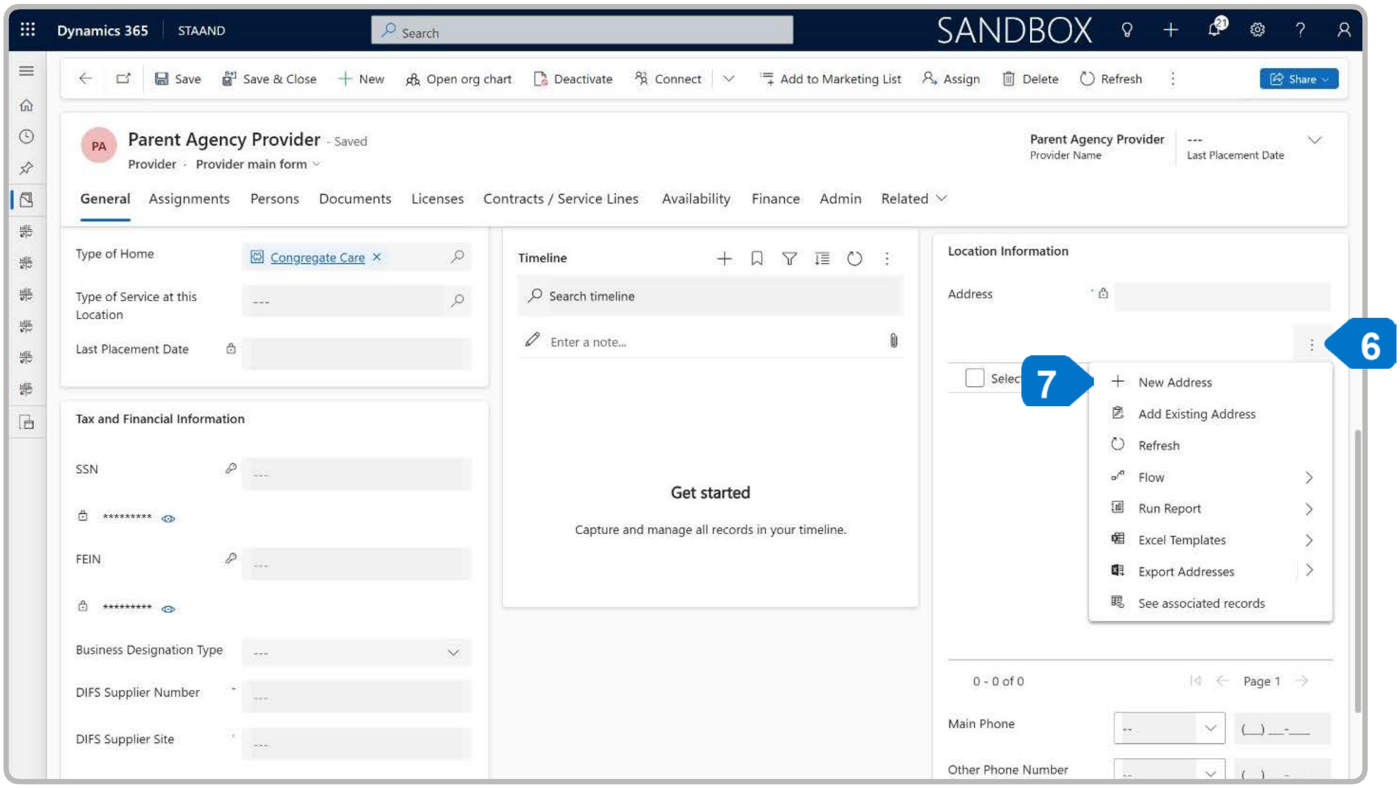


2. Complete all fields including, Provider Category, and Provider Class.
3. Select Yes in the “Is Agency” field.
4. Enter a Primary Contact, within the Contact Information subgrid.
5. Select Save.

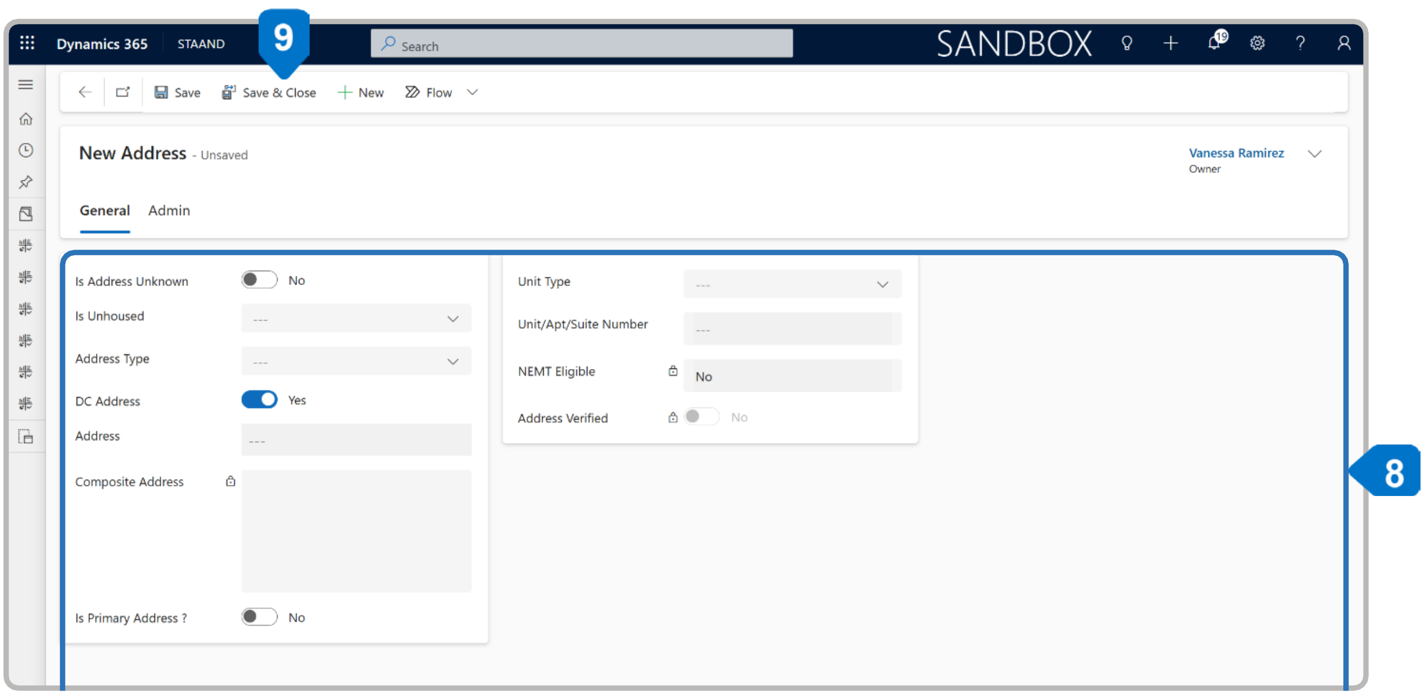


Note:
When selecting a Provider Category, a Provider can be classified as Contracted, Non-Contracted, or both.

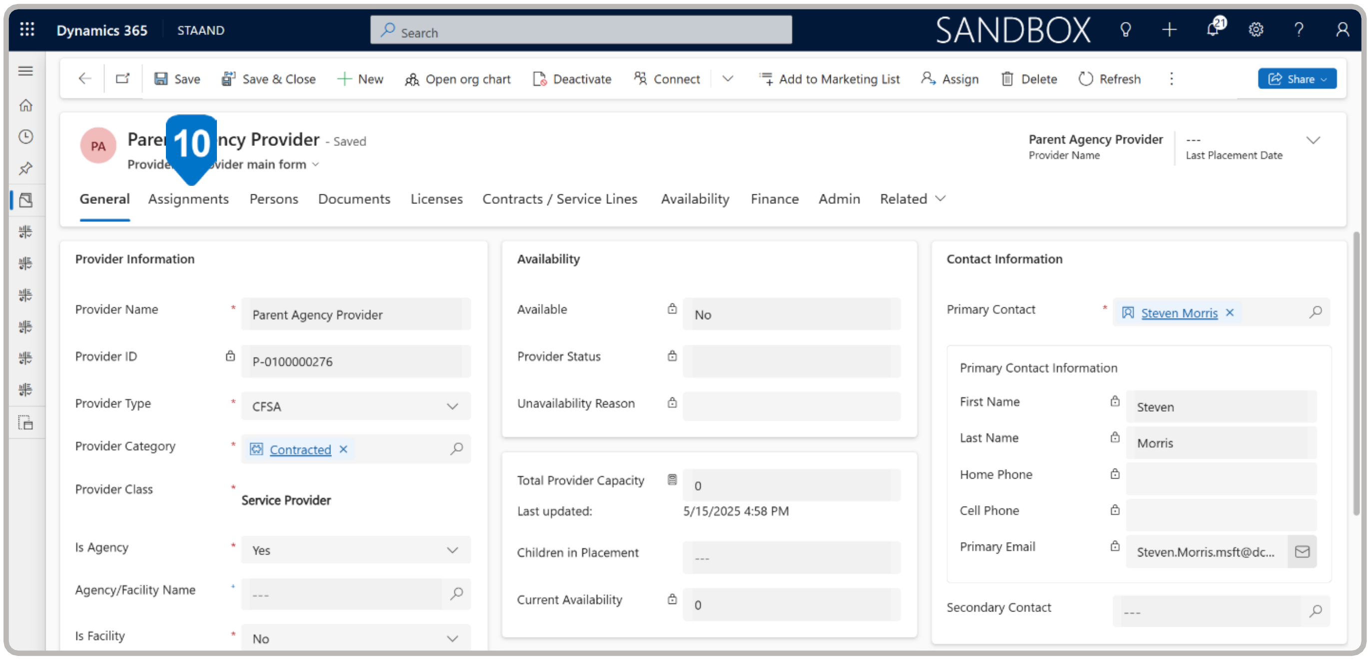
6. From the Location Information sub-grid, select the more commands icon.
7. Select + New Address.



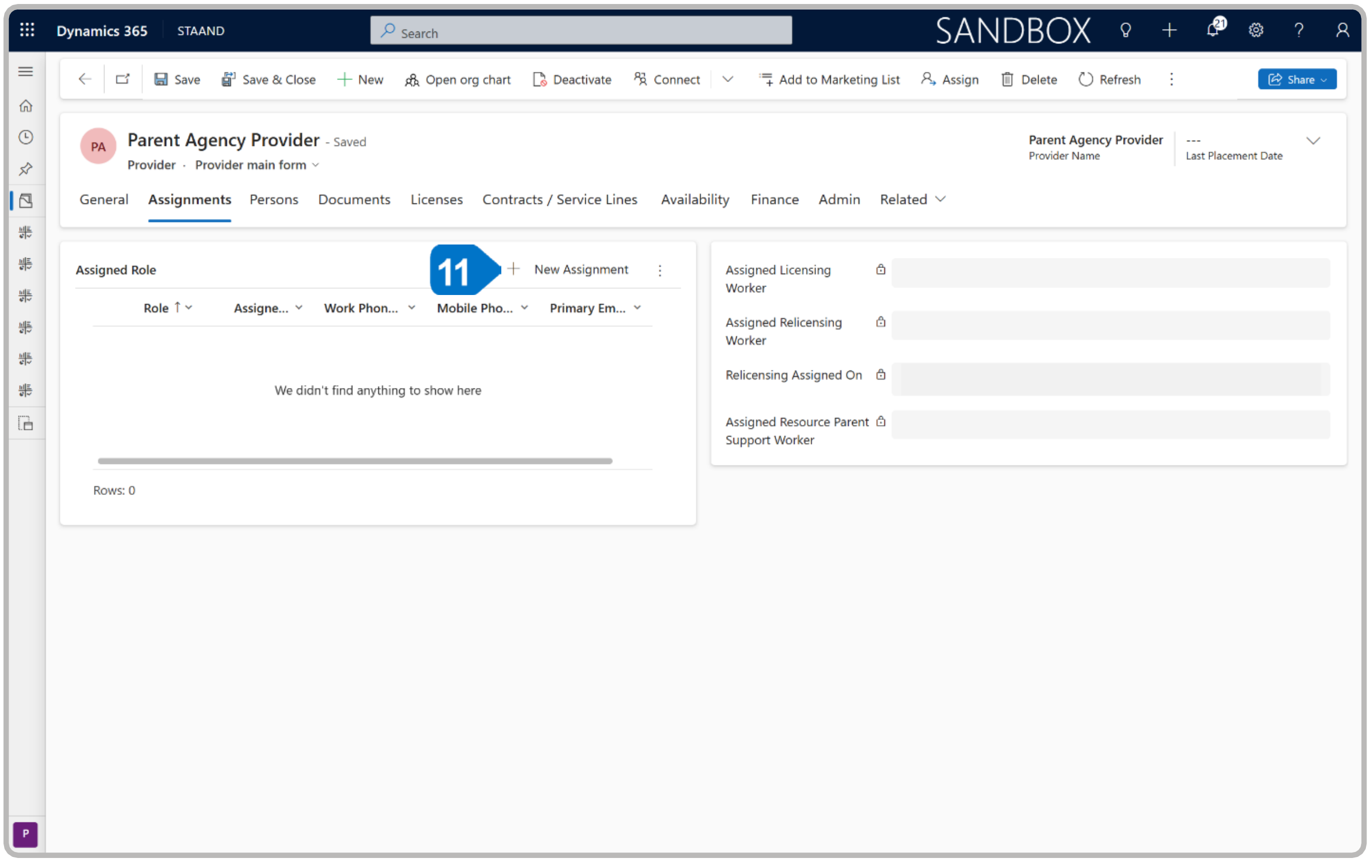
8. Complete all fields.
9. Select Save & Close.



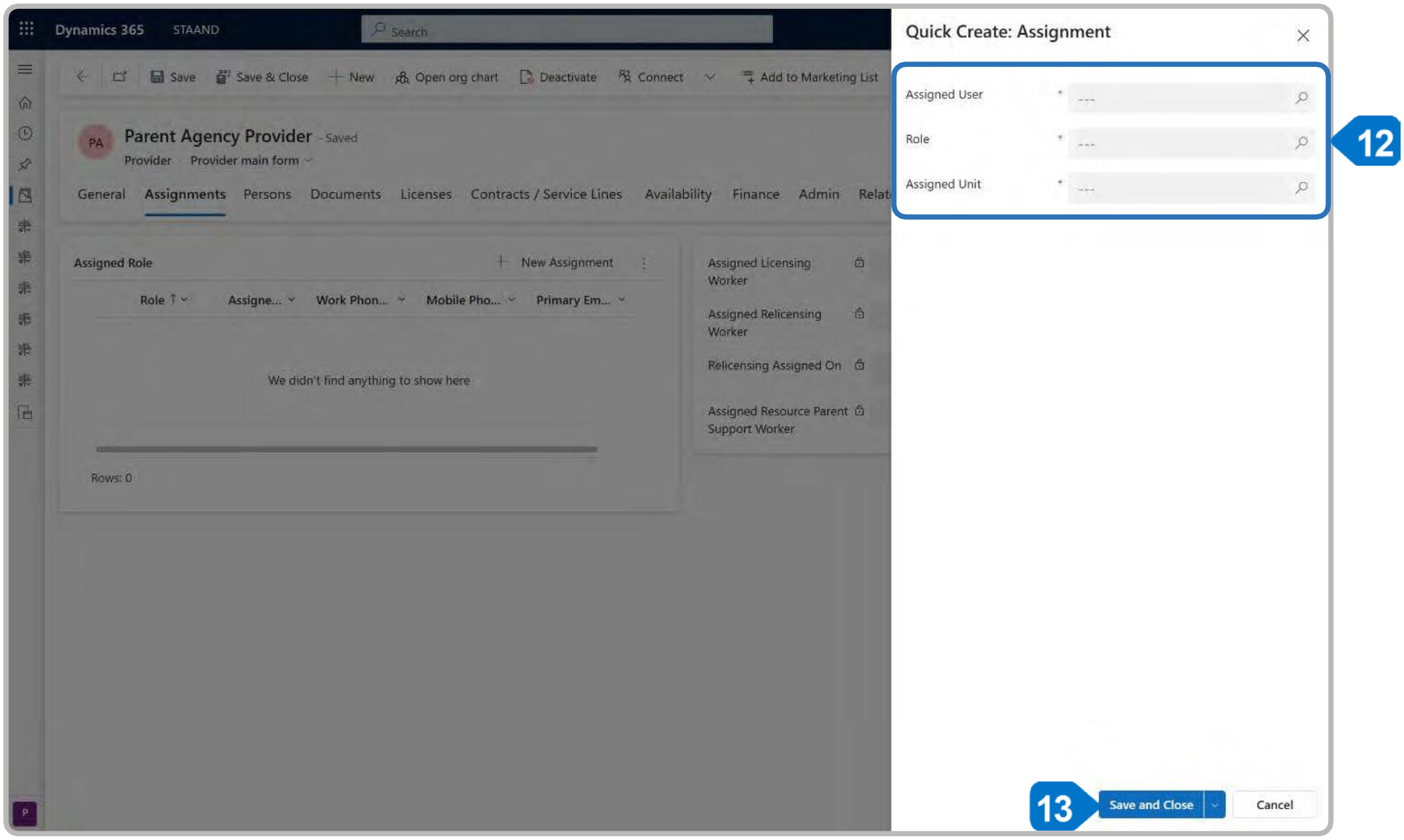
10. To assign the Provider record, select the Assignments tab.



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



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.

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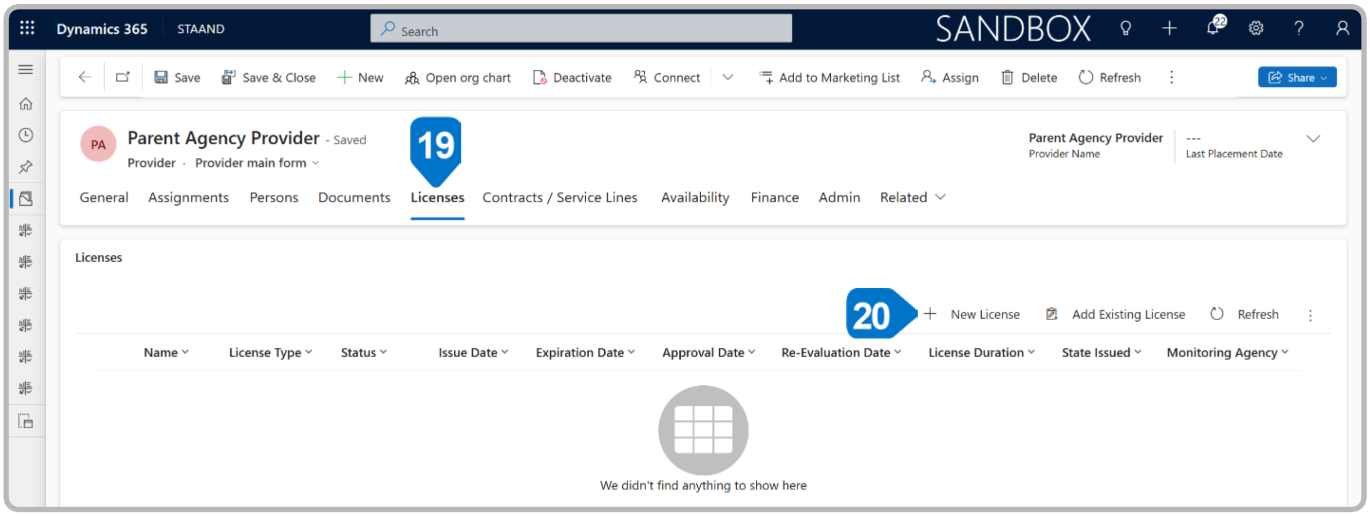
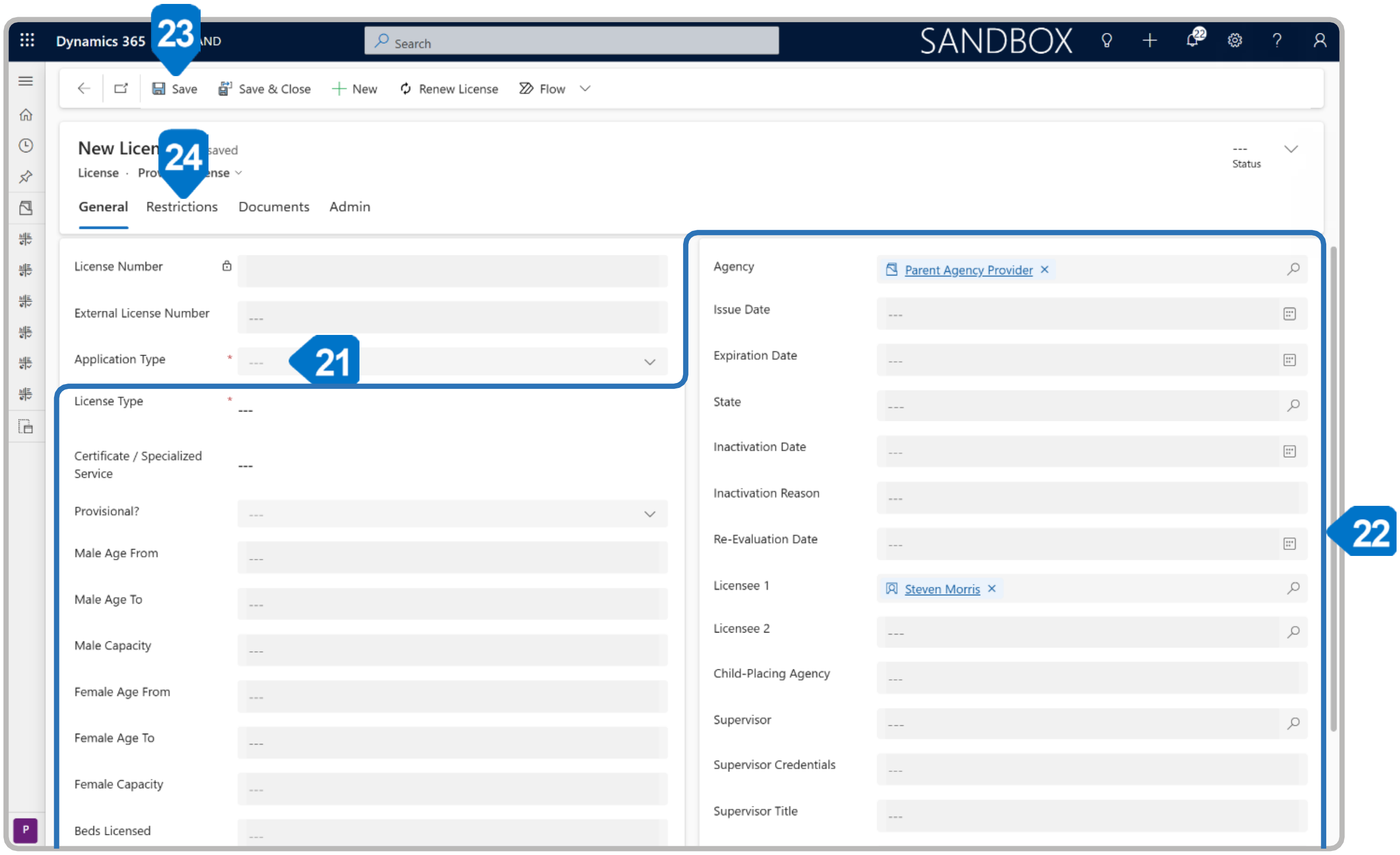
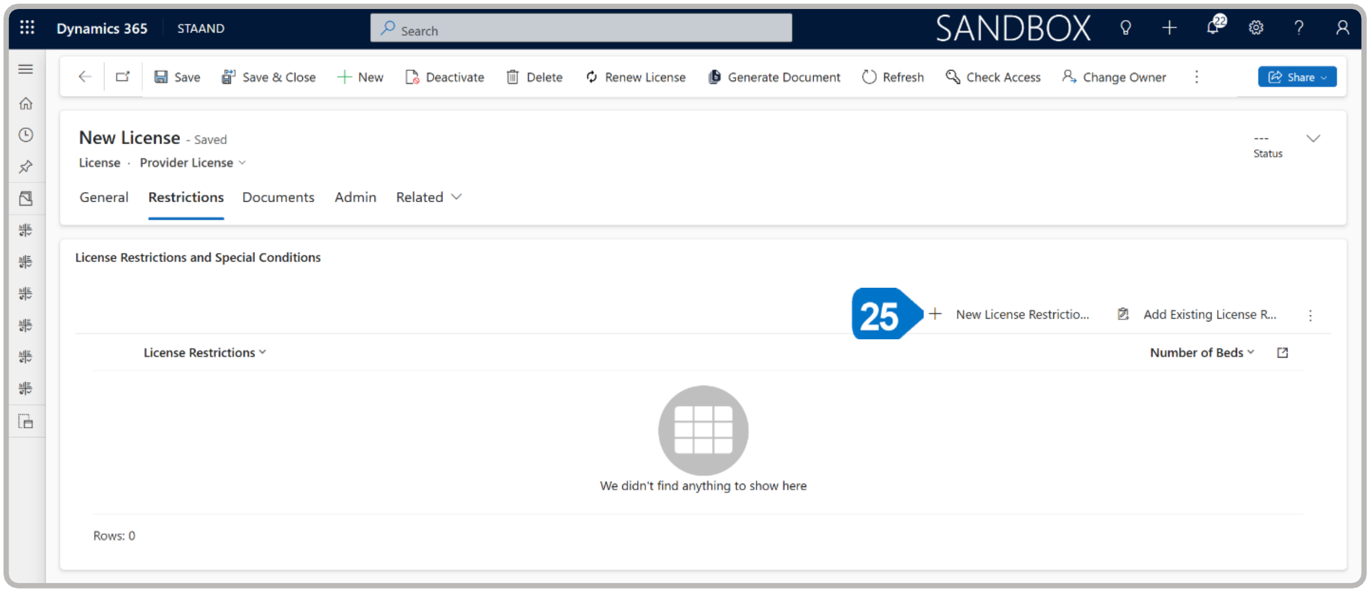
14. **To add information on Agency Provider's license,** select the Licenses tab.
15. Select +New License.



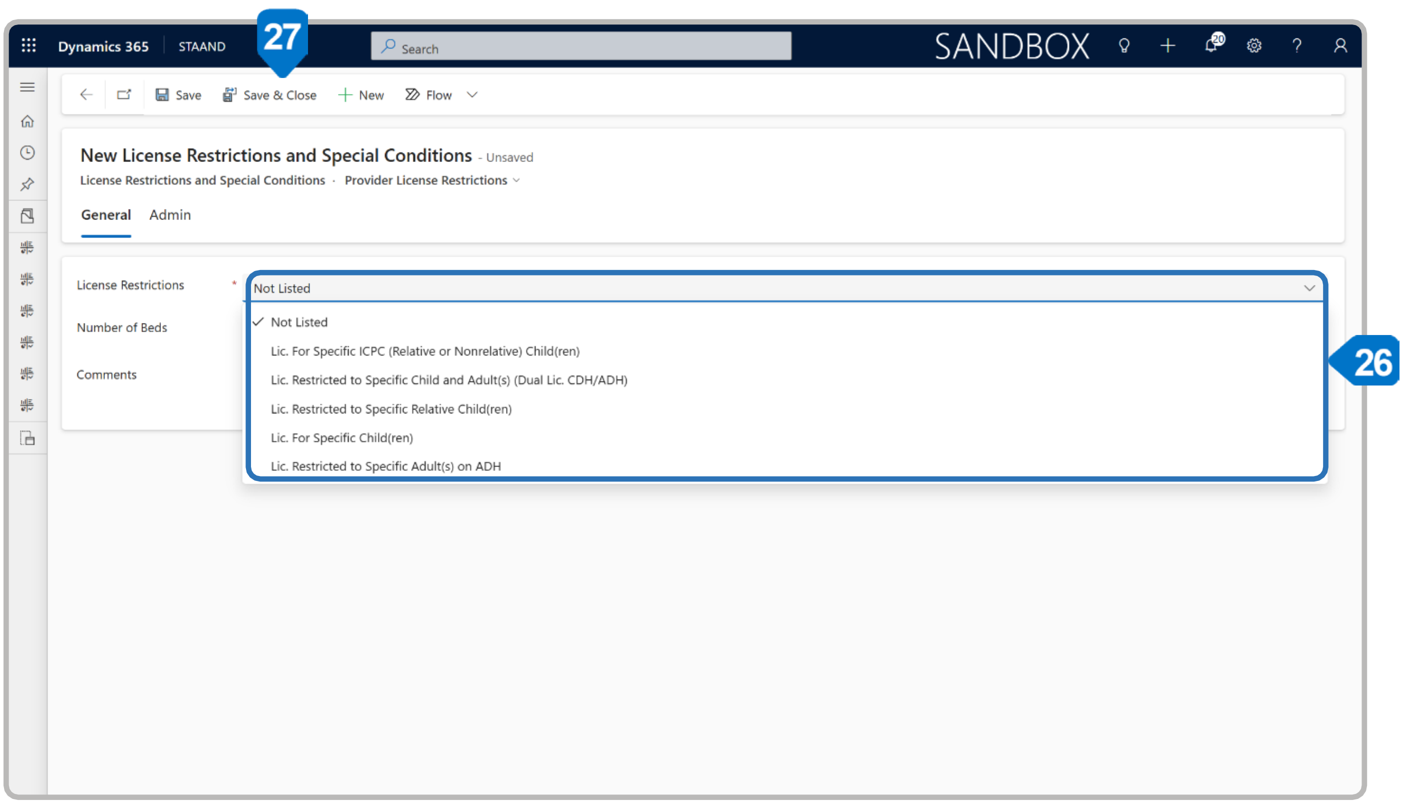
16. Select fields as applicable.
17. Complete all fields.
18. Select Save.
19. If the Agency Provider License has a restriction, select the Restrictions tab.



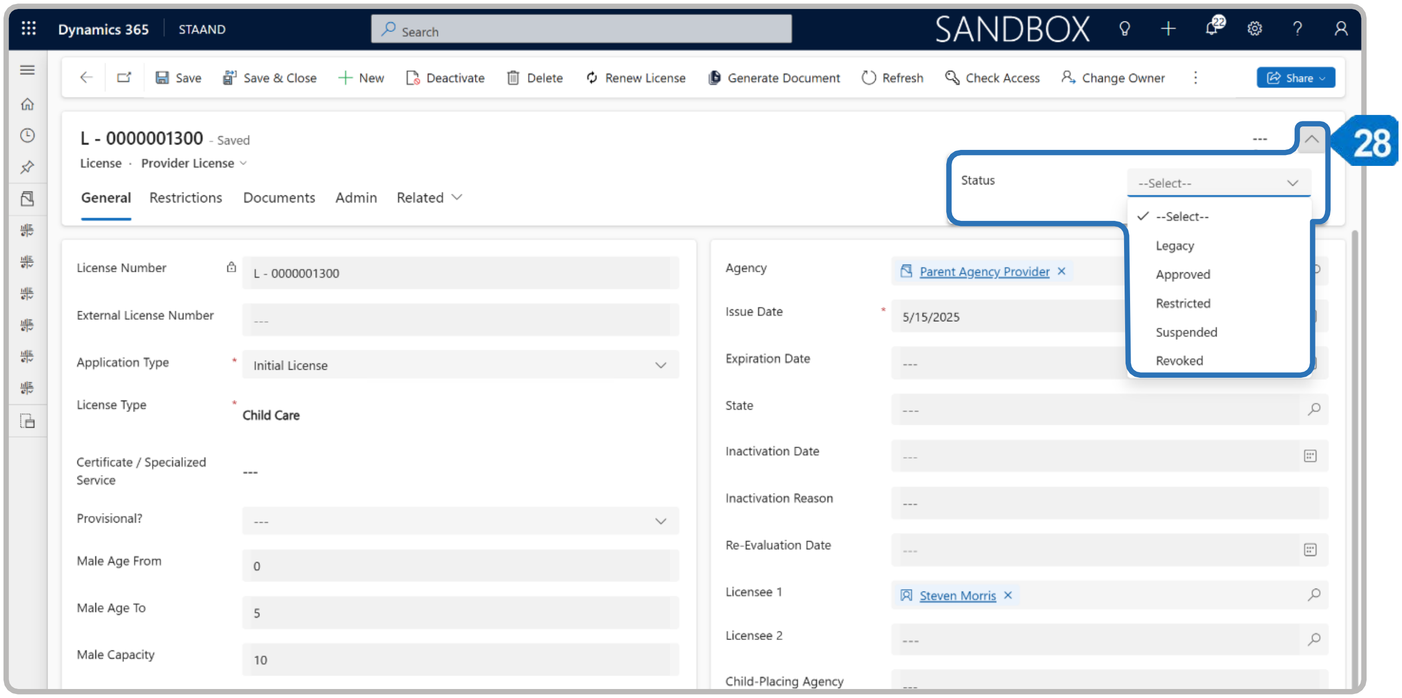
20. Select + New License Restrictions:



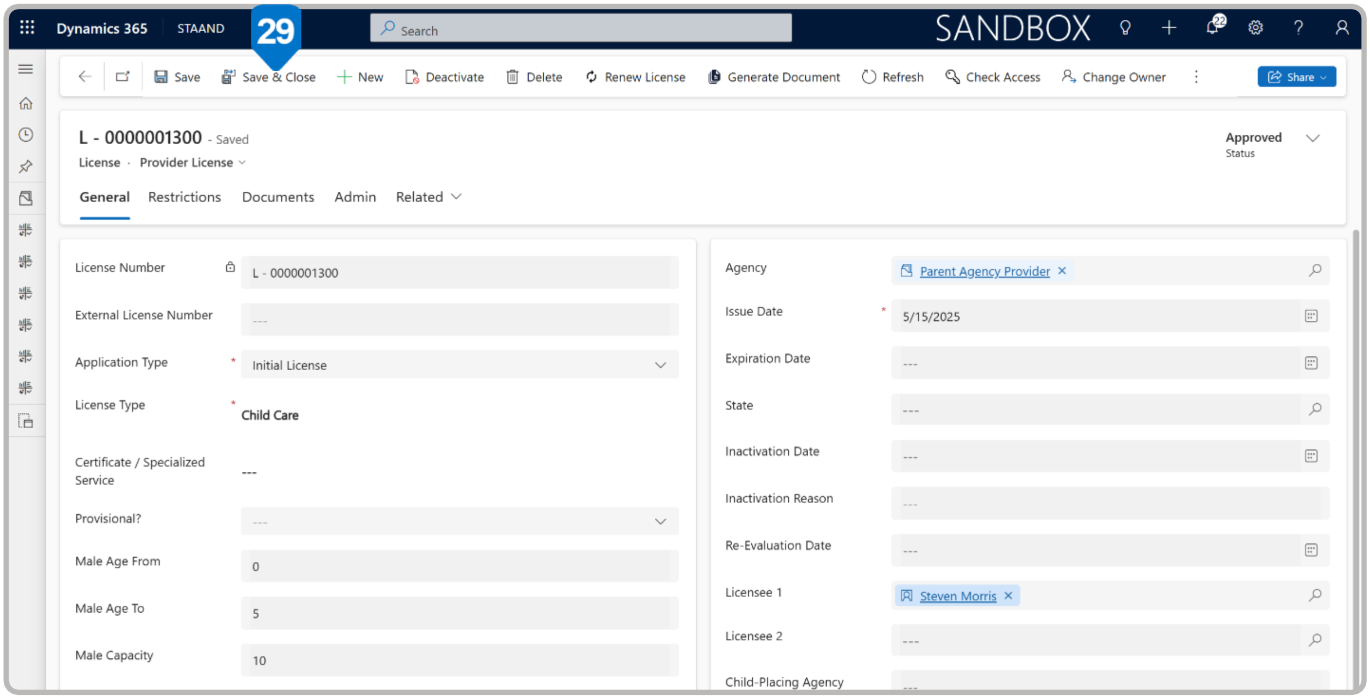
21. Select the License Restrictions from the dropdown menu and complete all necessary information.
22. Select Save & Close.



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

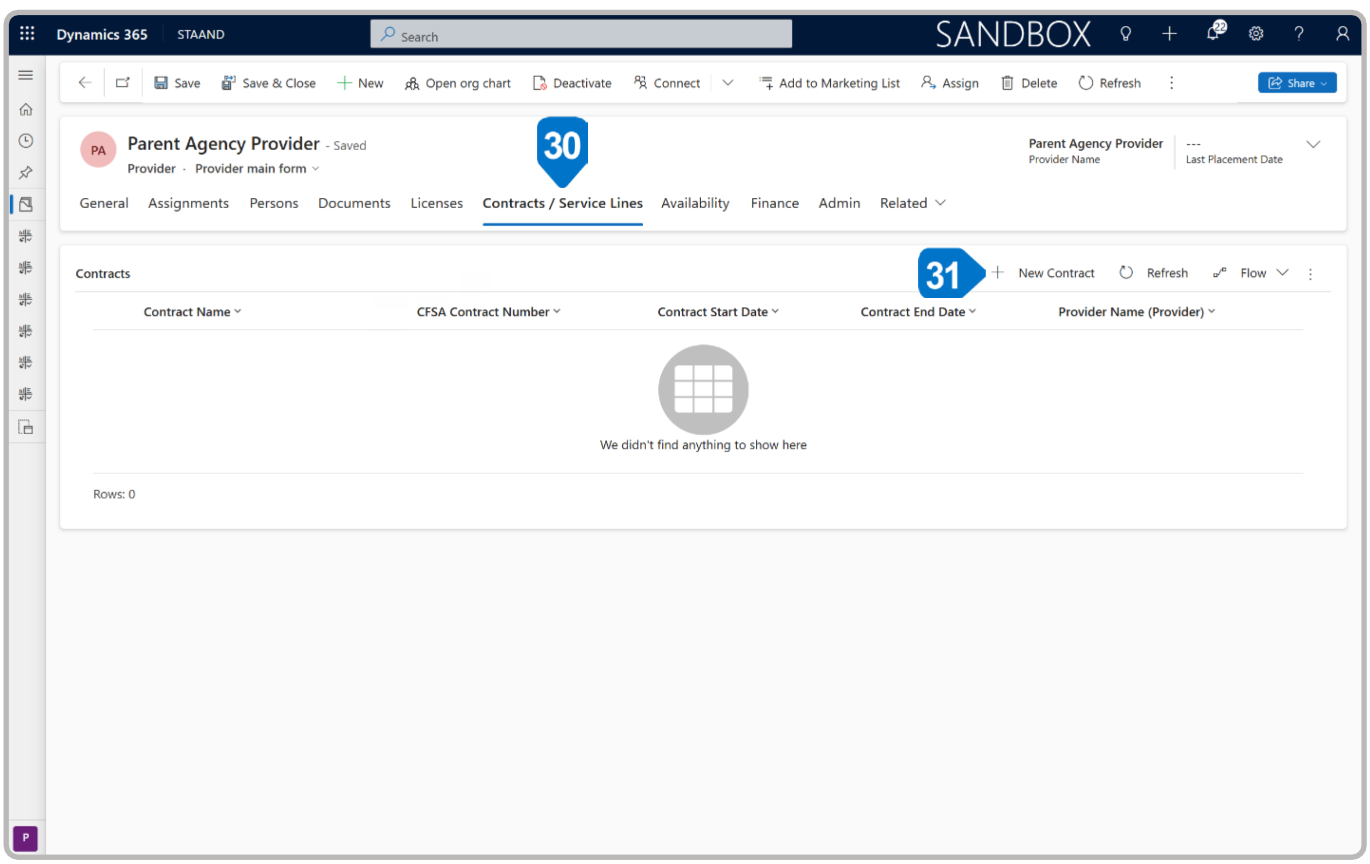


24. Select Save & Close to return to the Provider record.



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

26. Select + New Contract.



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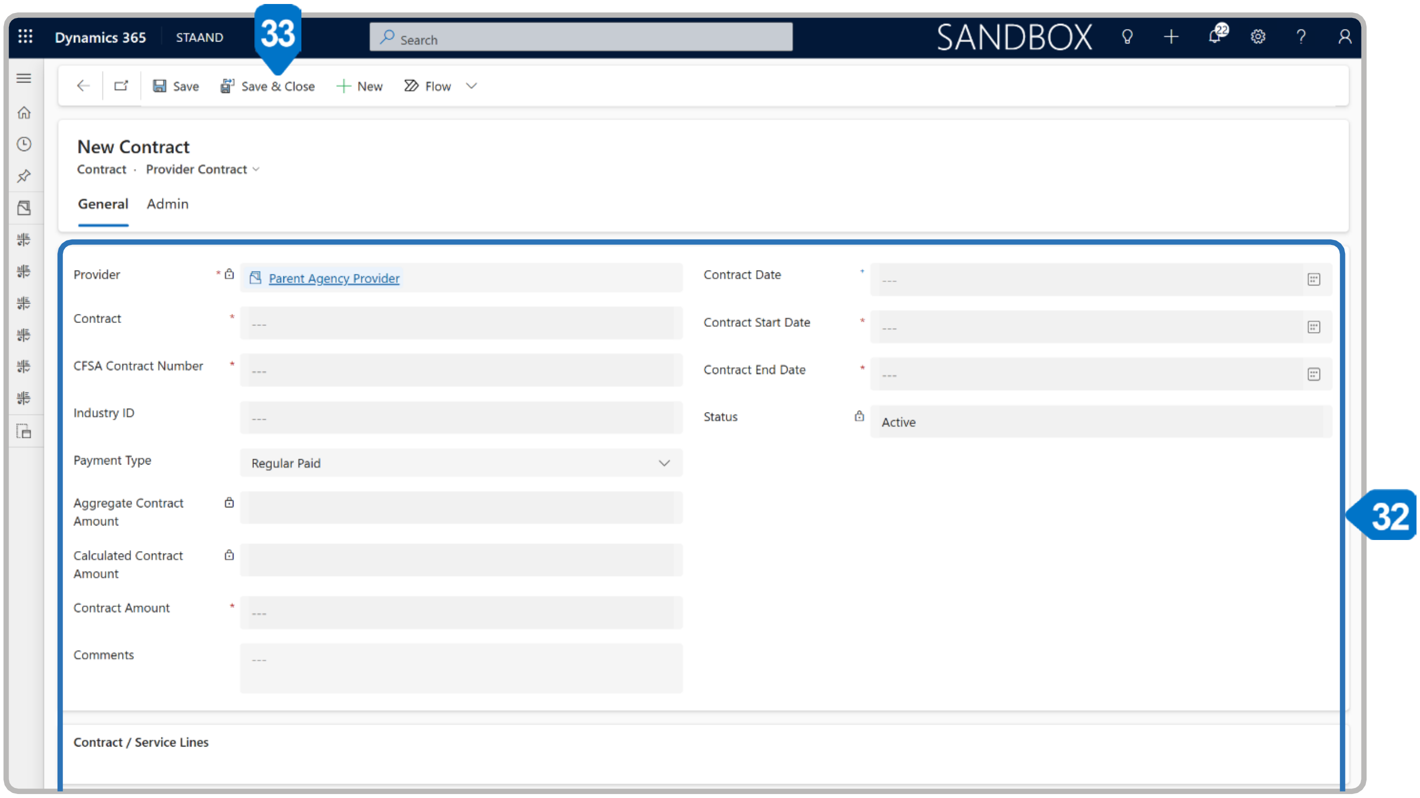
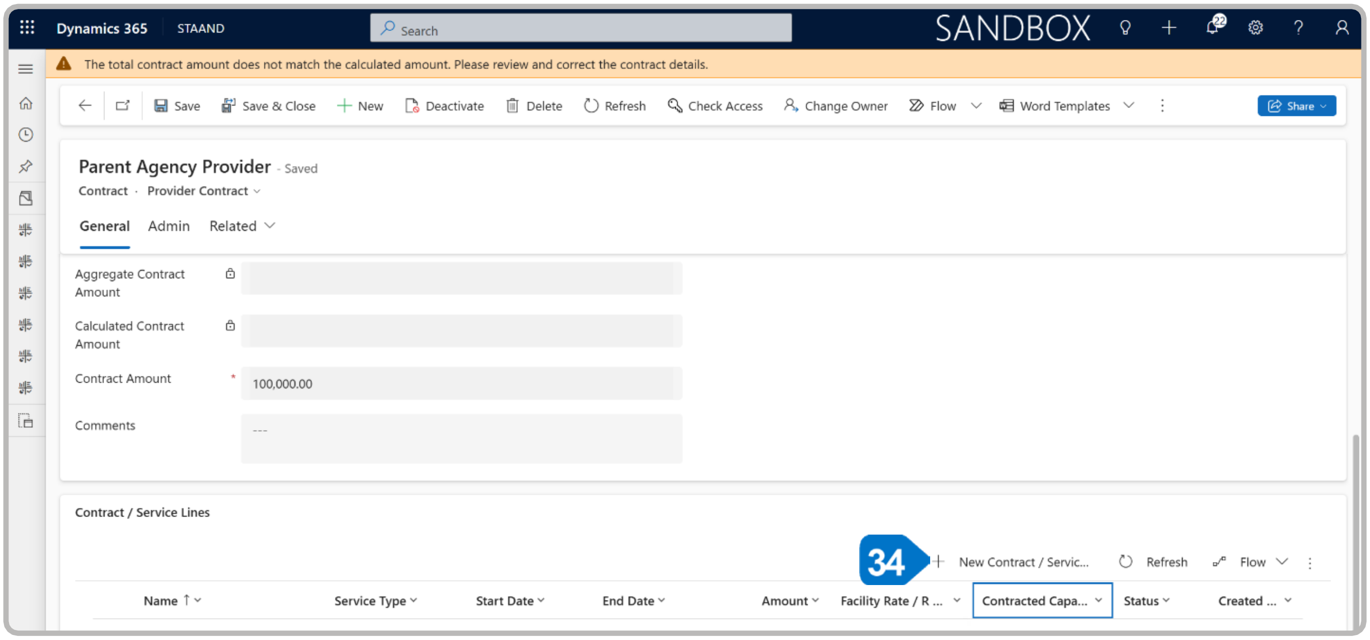
27. Complete all fields including Contract, CFSA Contract Number, Contract Amount, Contract Start Date, and Contract End Date.

28. Select Save.

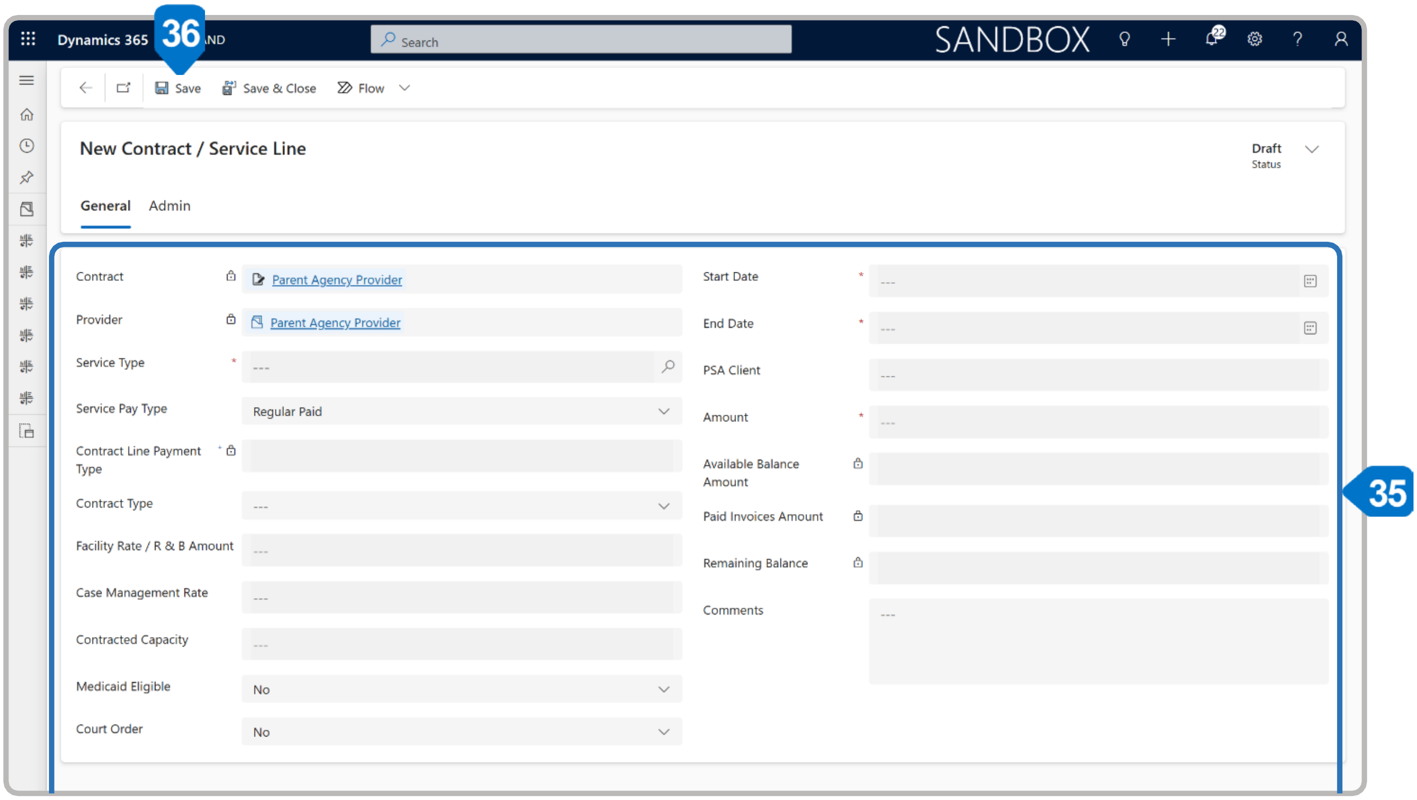


29. Select + New Contract/Service Line.

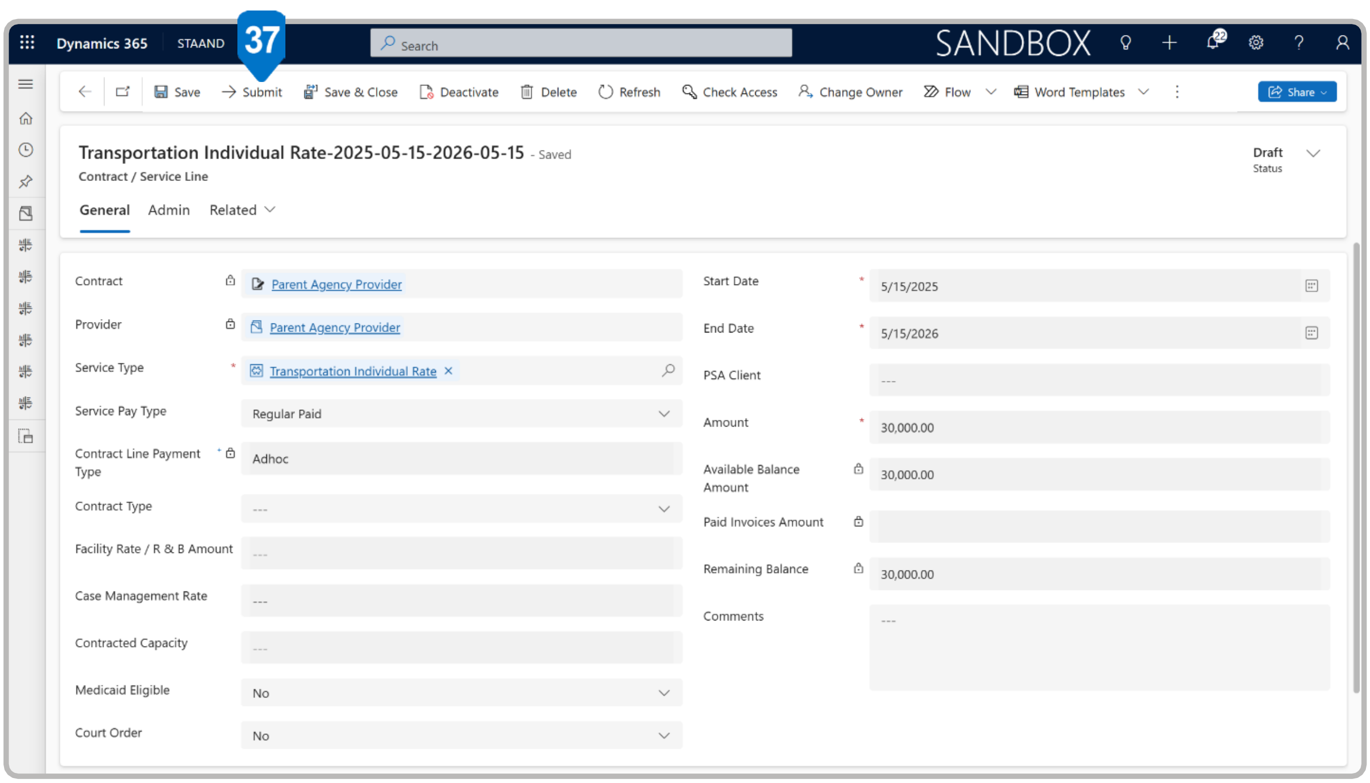


30. Complete all fields including Service Type, Start Date, End Date, and Amount.

31. Select Save.

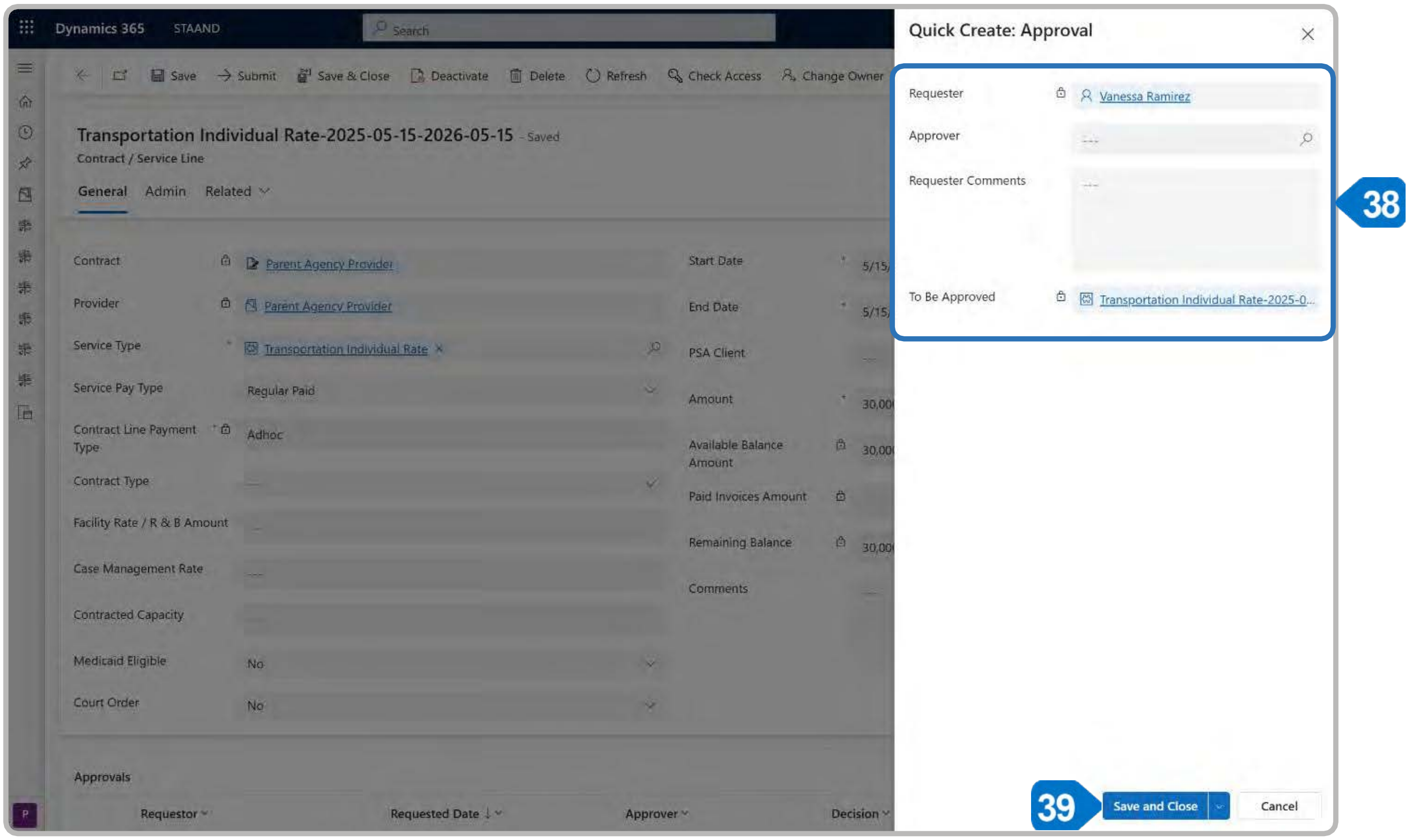


32. Select Submit to submit the record for approval.



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

34. Select Save and Close.



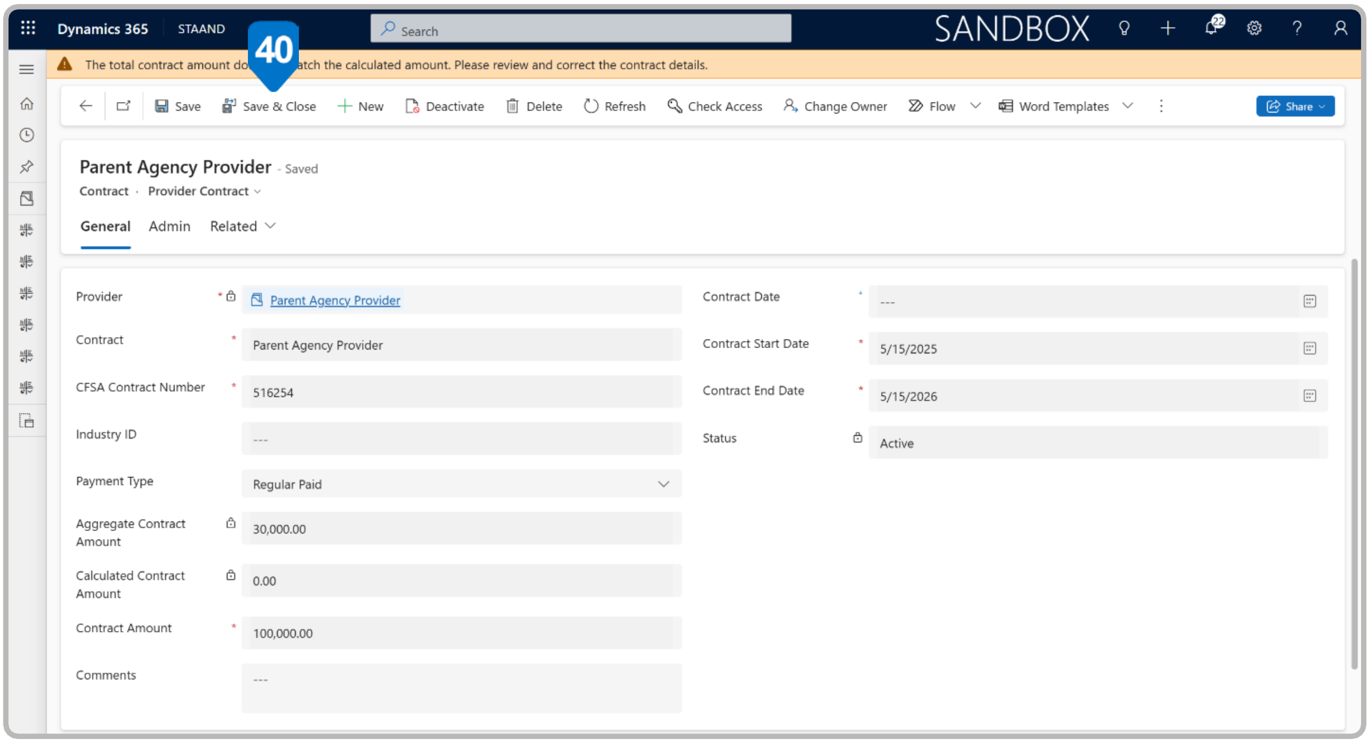
Important Tip:

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

Note:

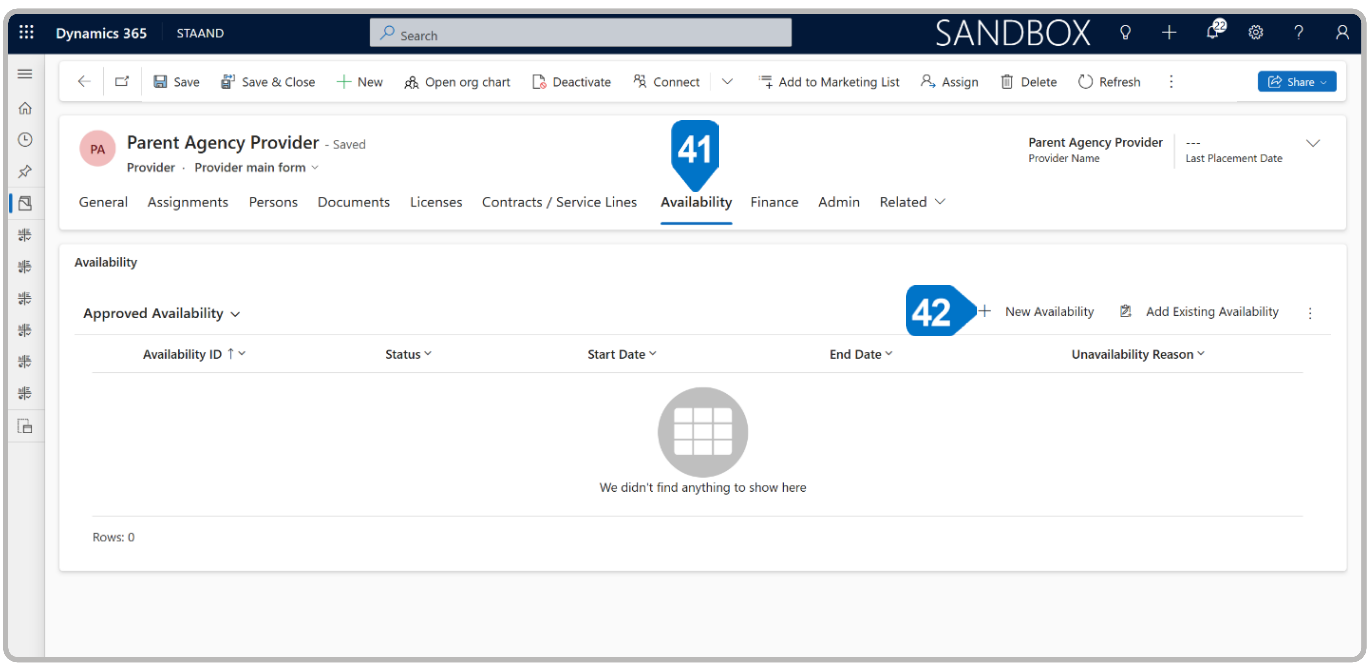
To approve, please refer to **How To: Approve Provider Records** on page 61.

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



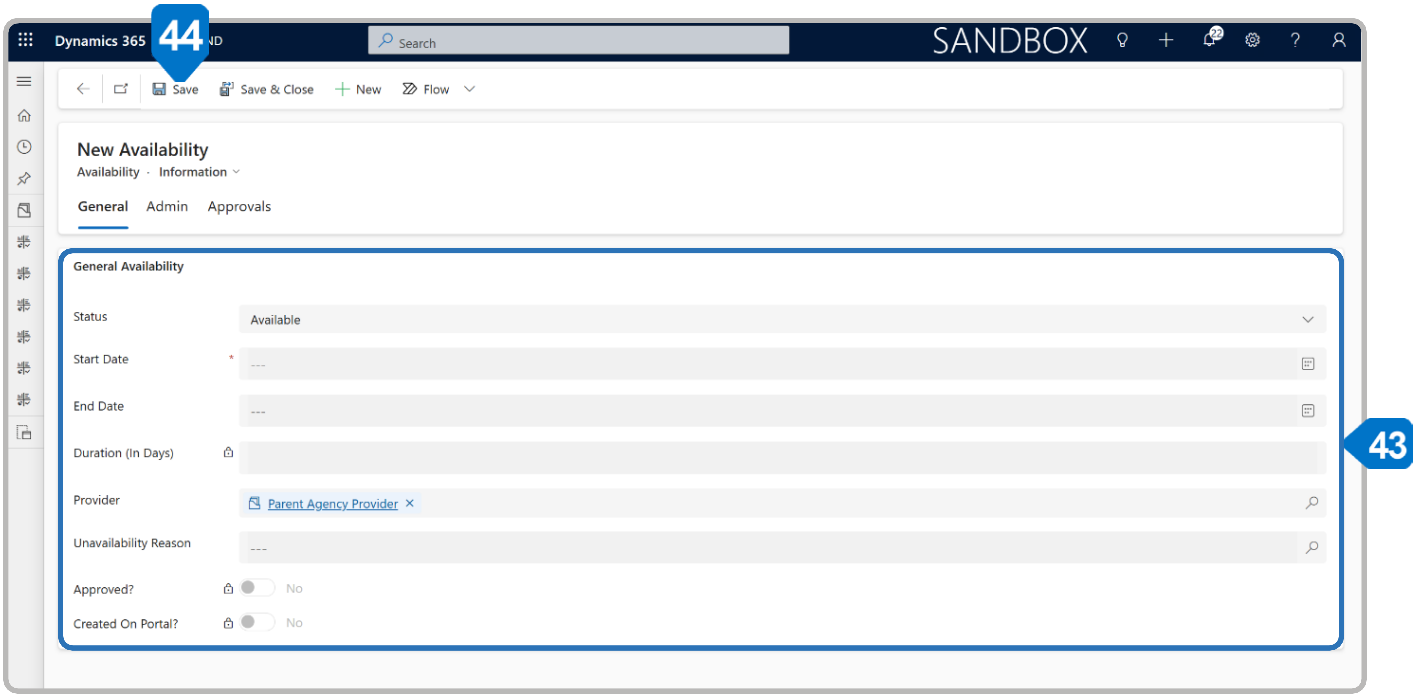
36. To record Provider availability, select the Availability tab.

37. Select + New Availability.



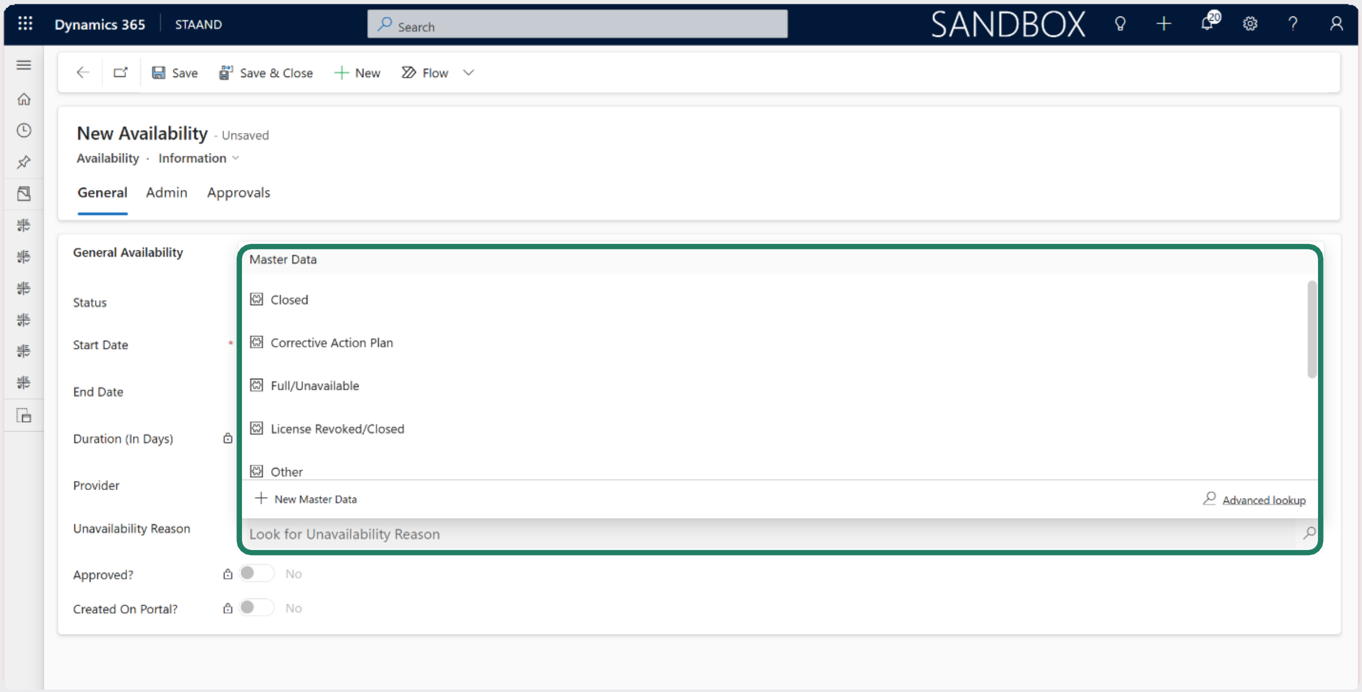
38. Complete all fields including Status and Start Date.

39. Select Save.

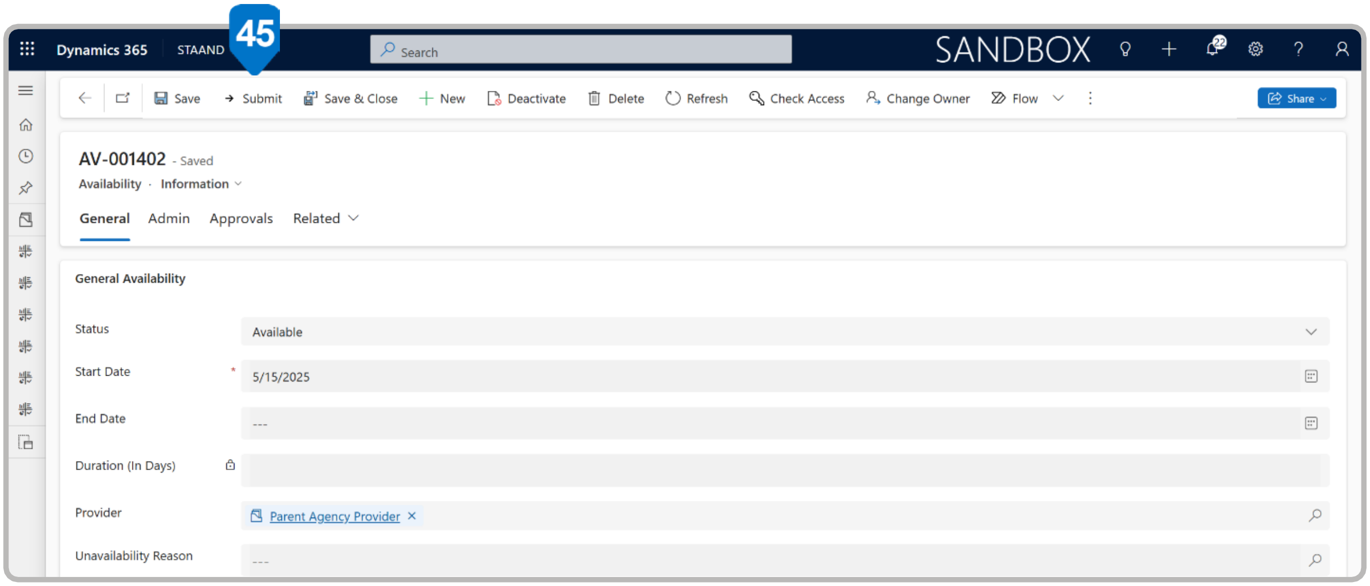


Note:

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

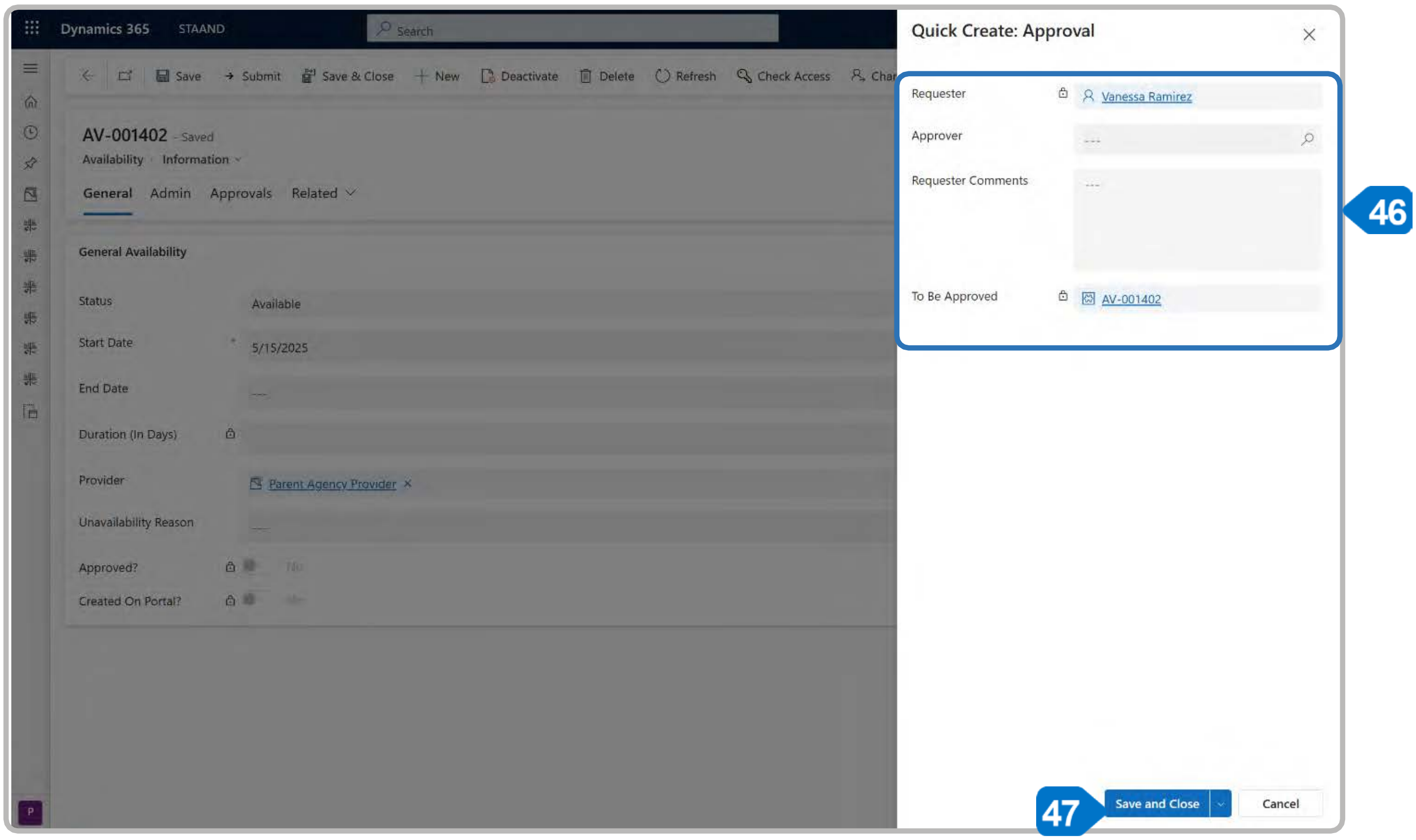


40. Select Submit to submit for approval.

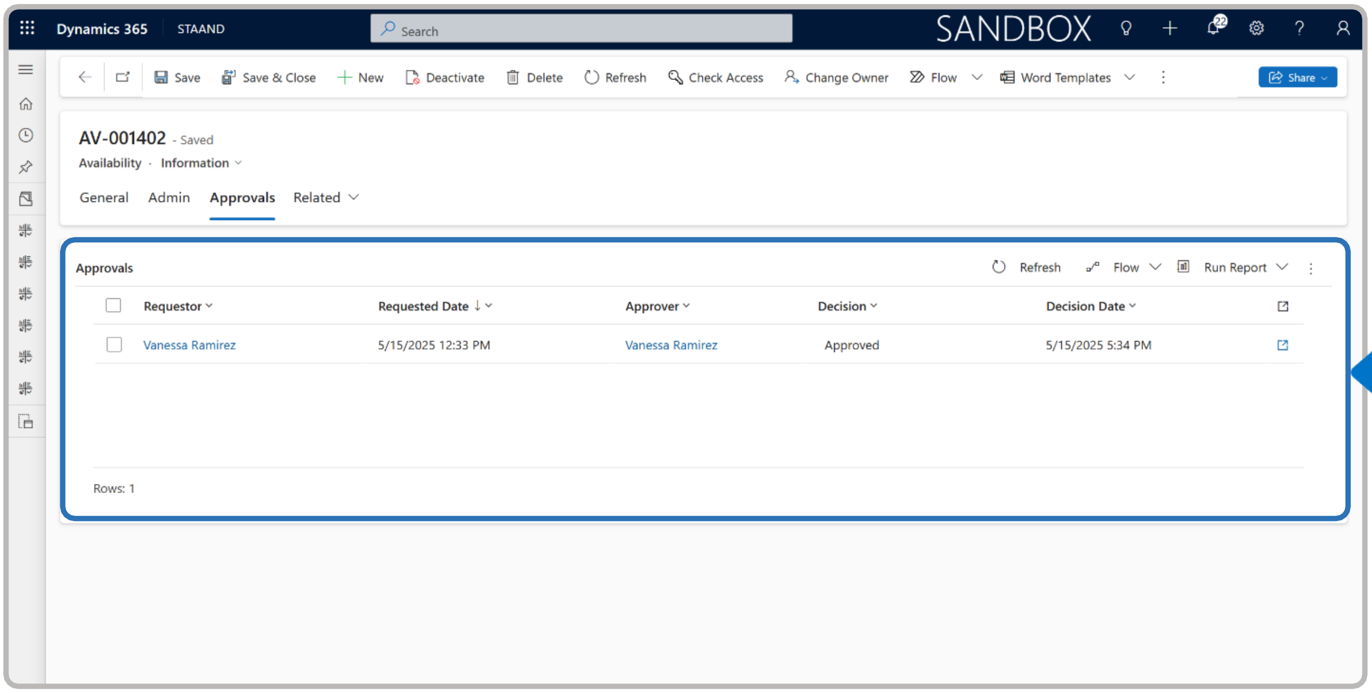


41. Complete all fields within the Quick Create: Approval window.

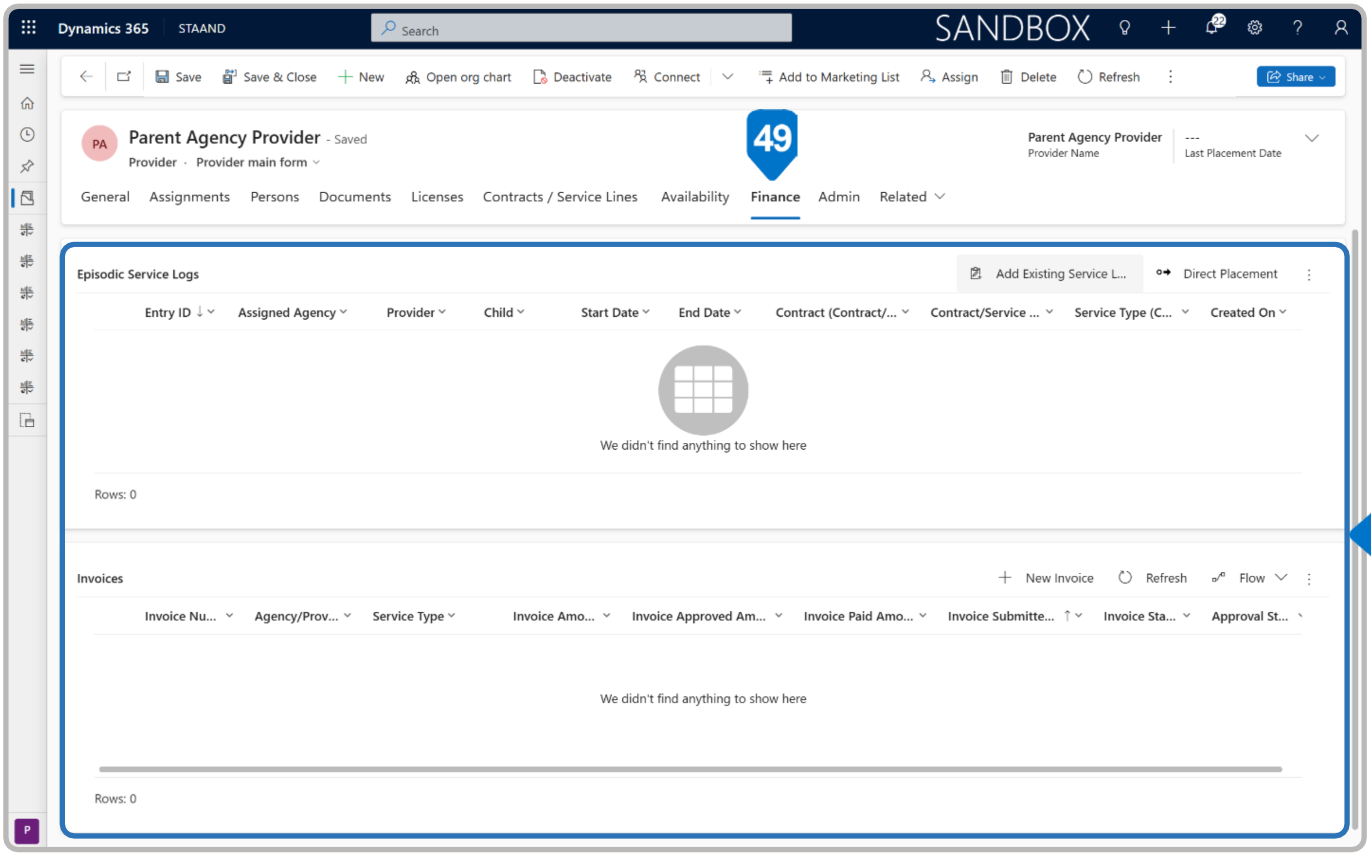
42. Select Save and Close.



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

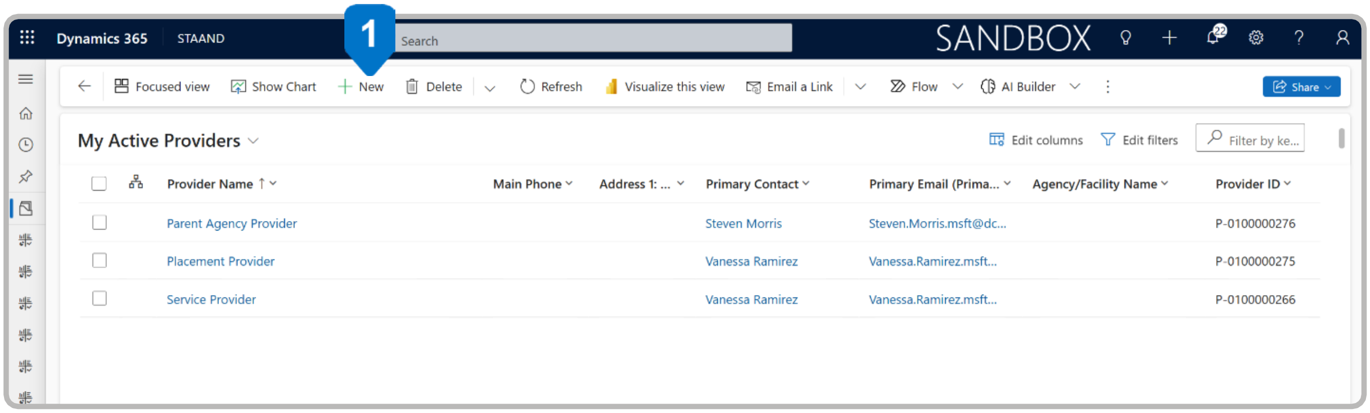


44. To view or generate Provider invoices, select the Finance tab.
45. Any Invoices related to the Provider will populate in the Finance tab.

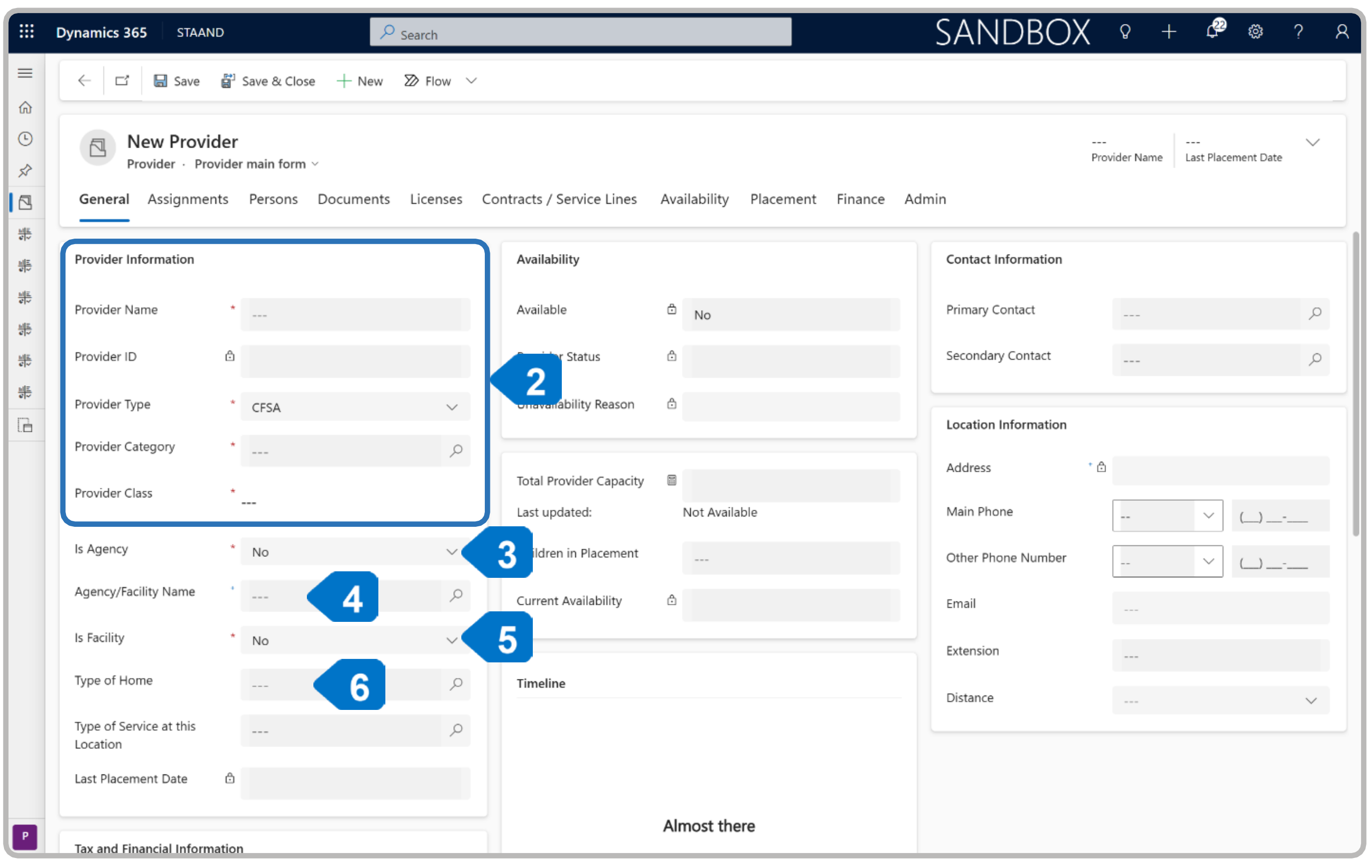


How To: Link a Facility to a Parent Agency

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.



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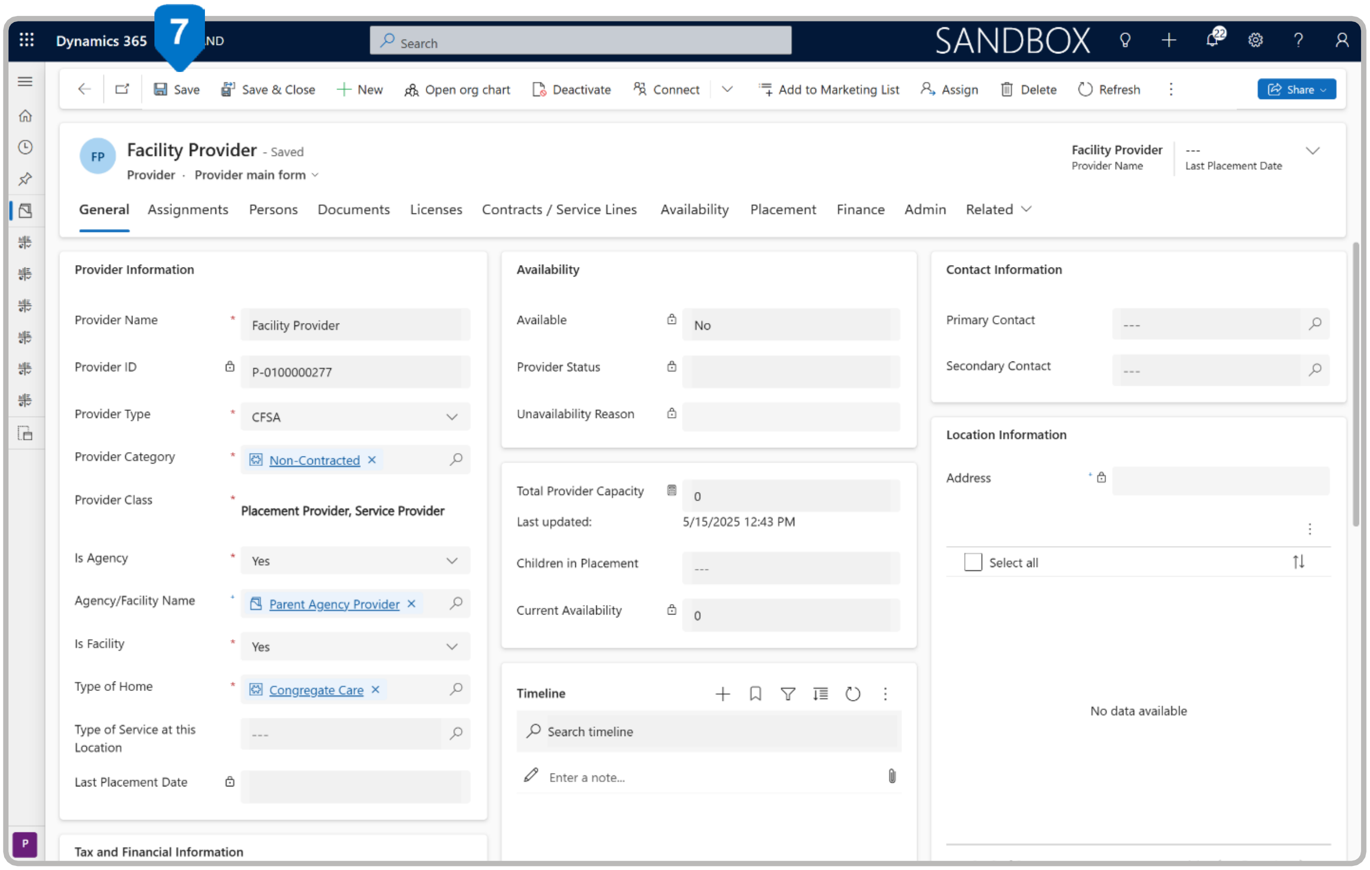
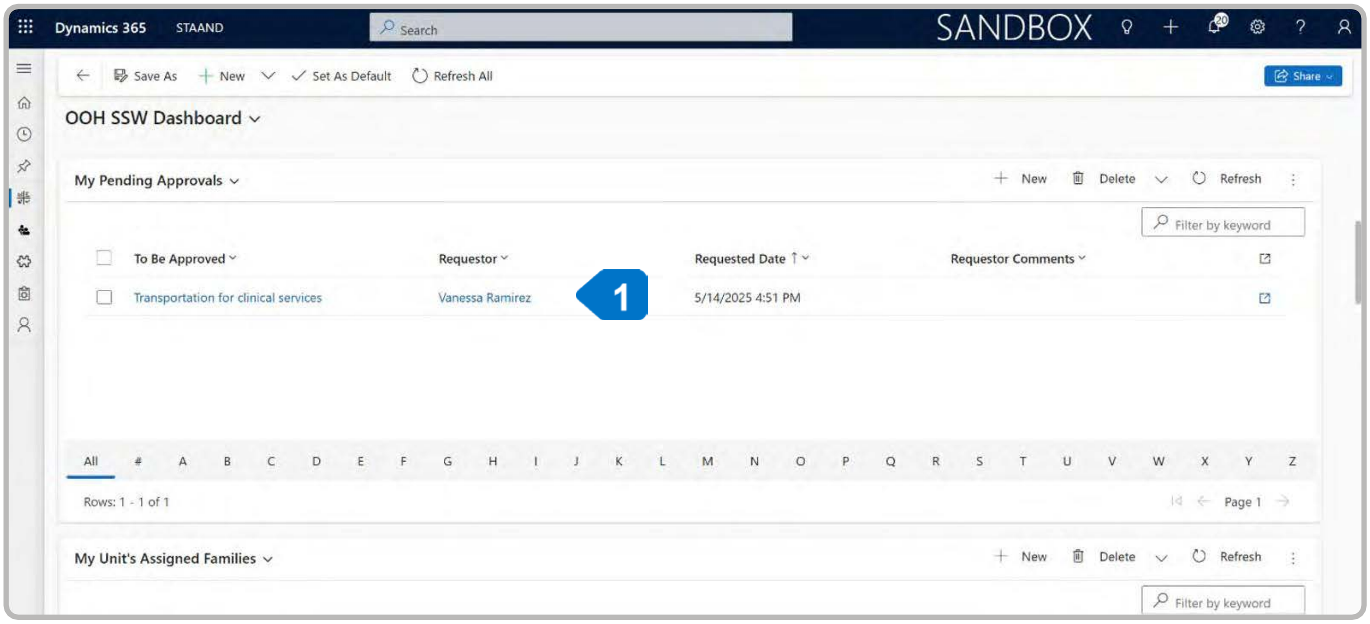
7. Select Save. The Facility Provider is now linked to the Parent Agency Provider.



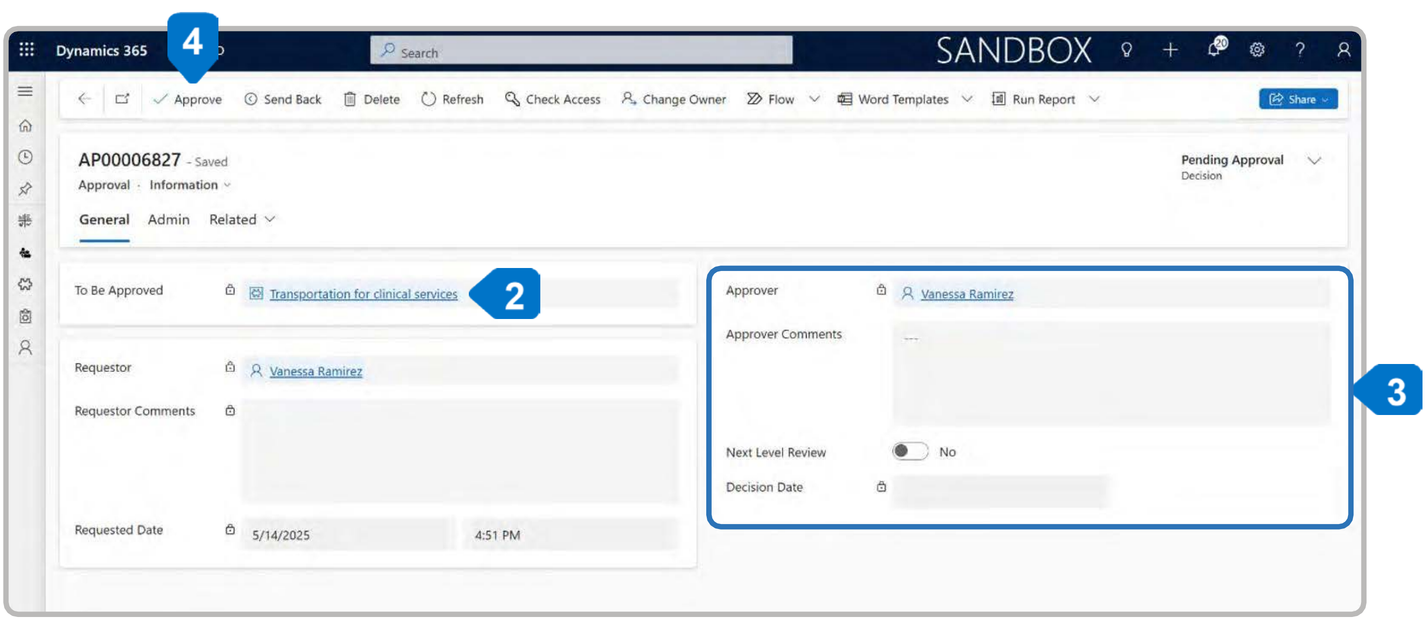
Approving Provider Records

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.

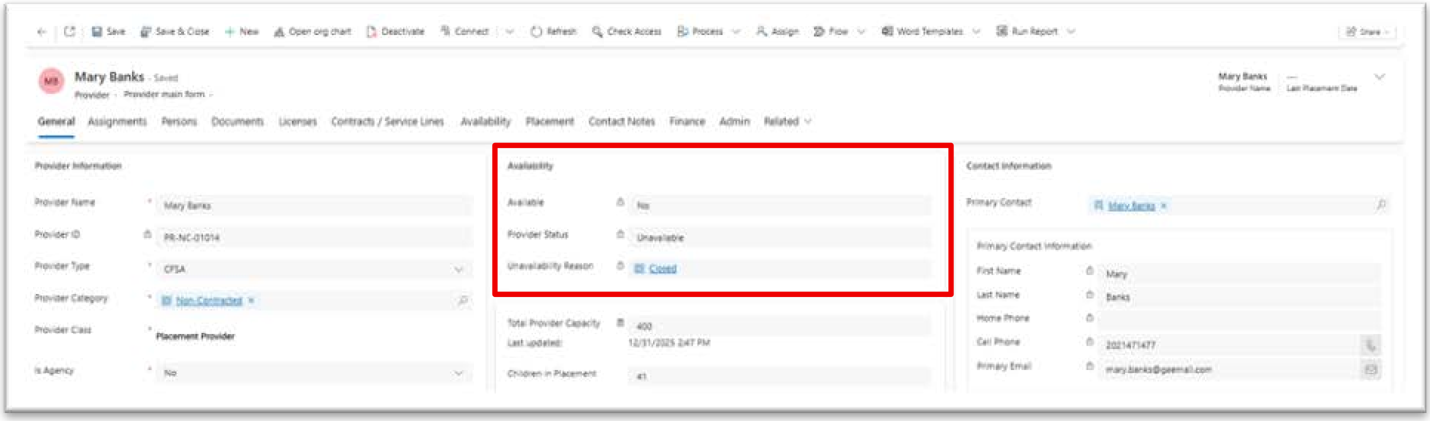


Checking Provider Availability

How To: Check Provider Availability

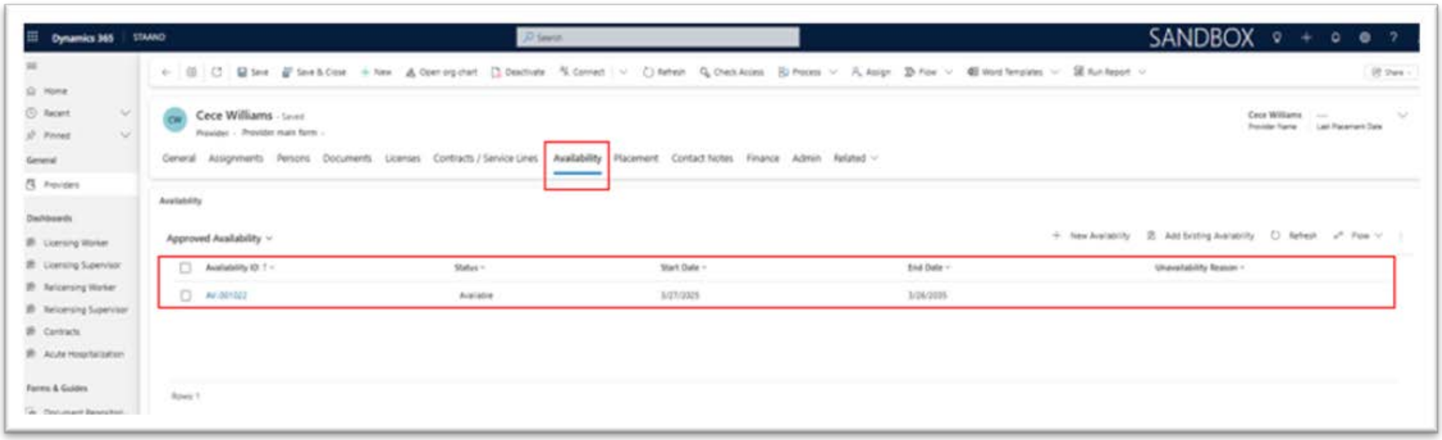
The availability of the provider is in two areas of STAAND; under the General and Availability tabs of the Provider record.

General Tab

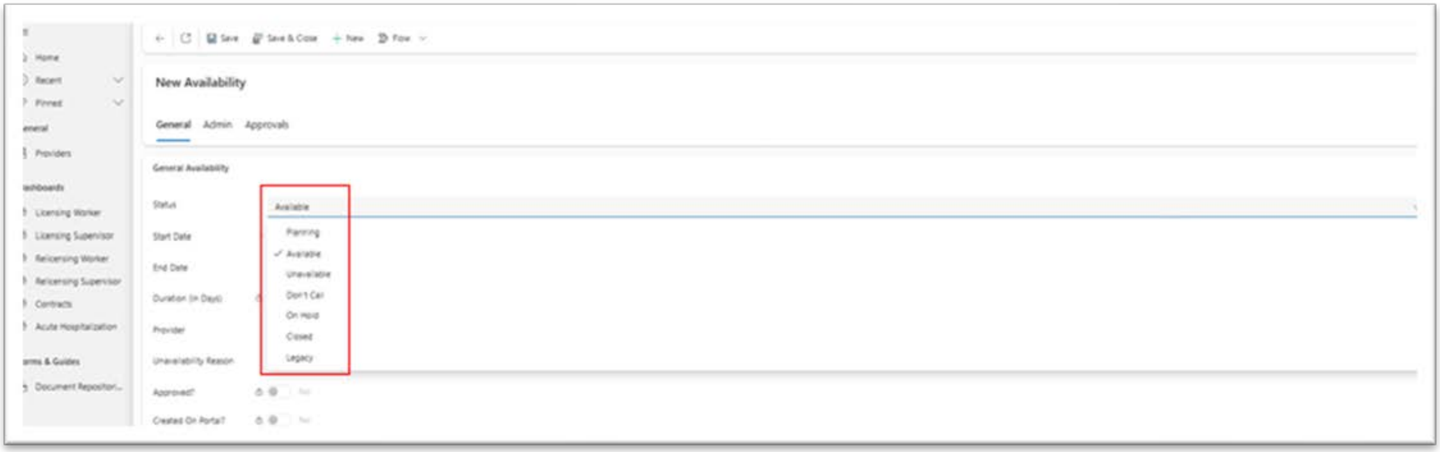


Availability Tab

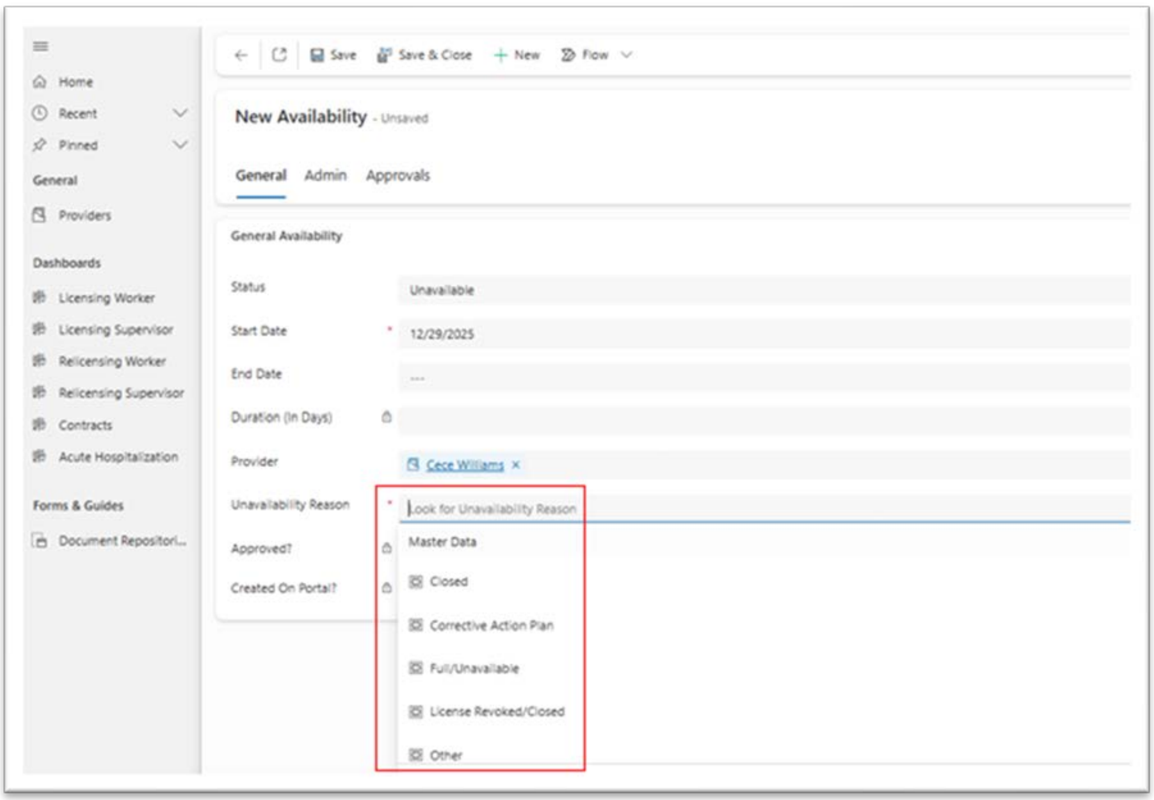
1. This Availability tab reveals the Availability ID, Status of the provider and the Start and End dates and the Unavailability Reason.



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.



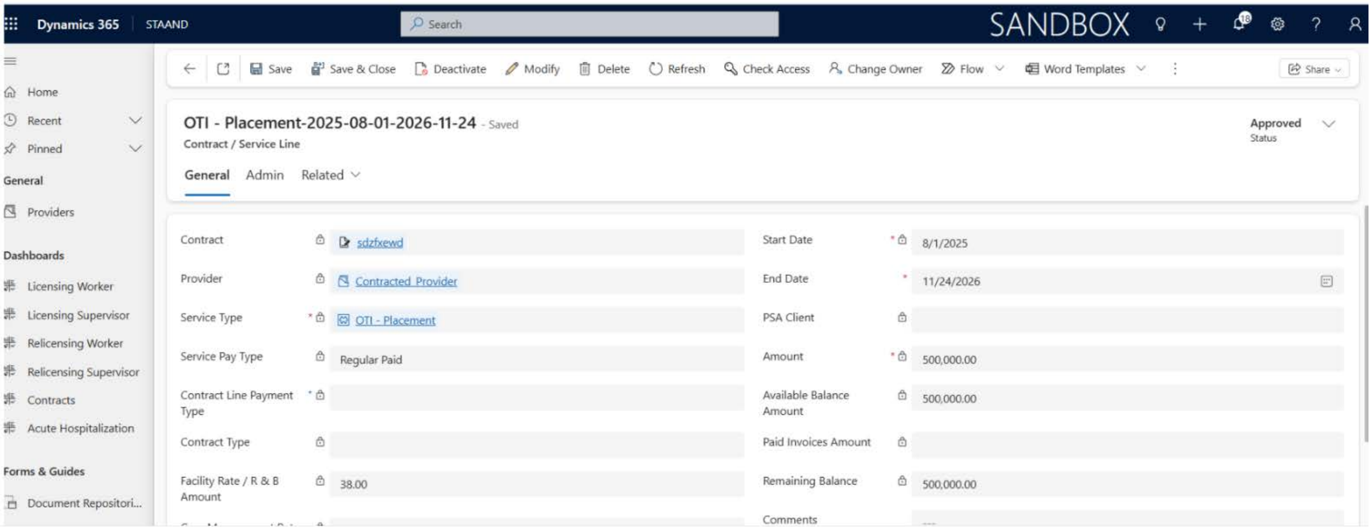
4. Enter the Start Date (required field) and End Date (if available).
5. Select the Unavailability Reason from the dropdown options. If Other is selected, type the reason in the narrative box.



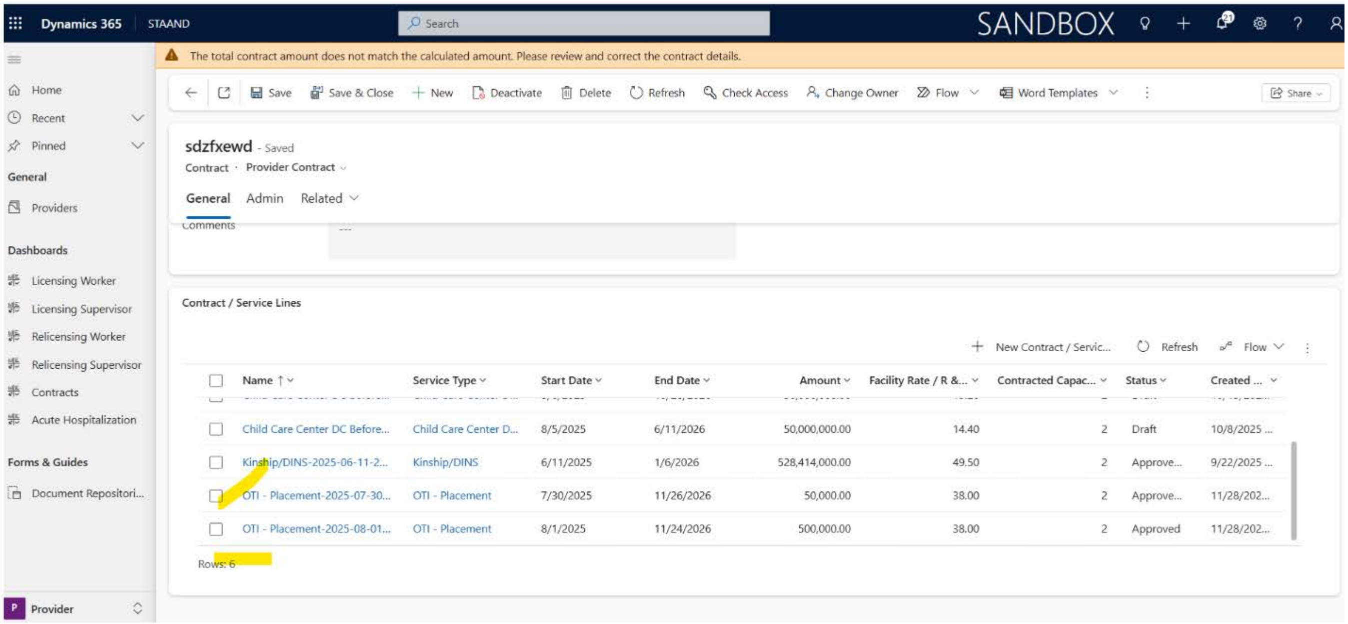
6. Save and Close.

How To: Transfer Service Logs and Provider Assignments

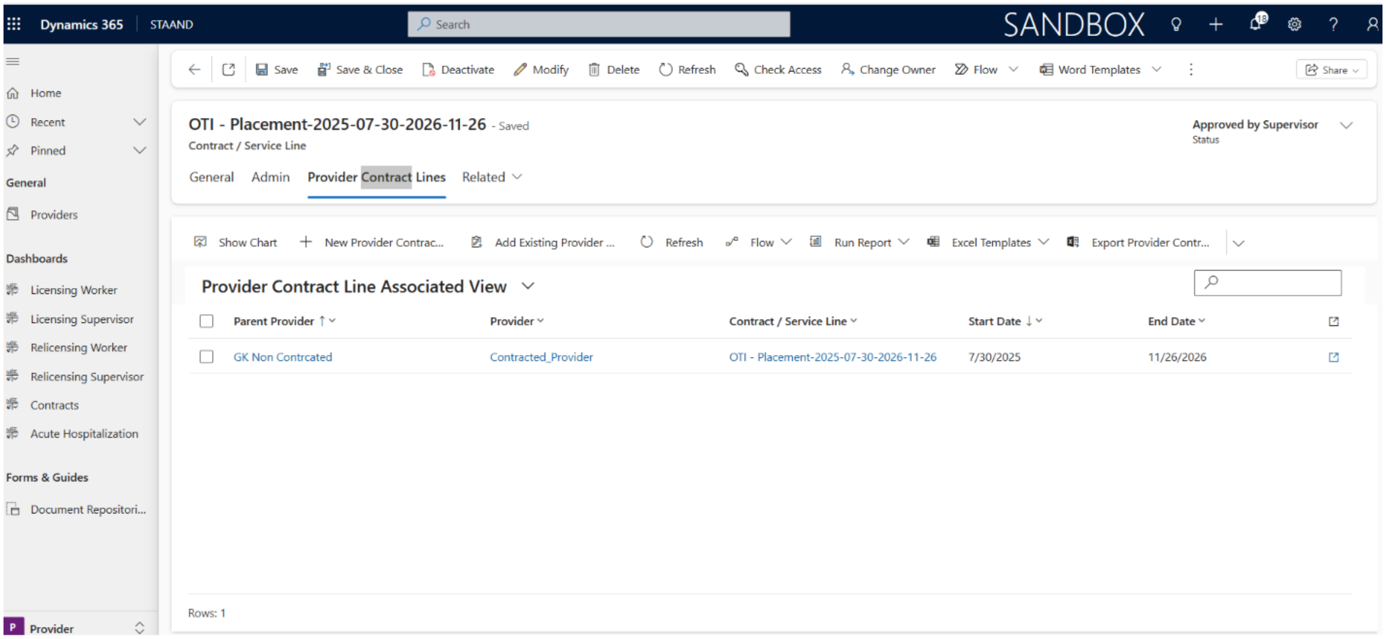
1. Open the Provider record.
2. Navigate to the Contract/ Service line.



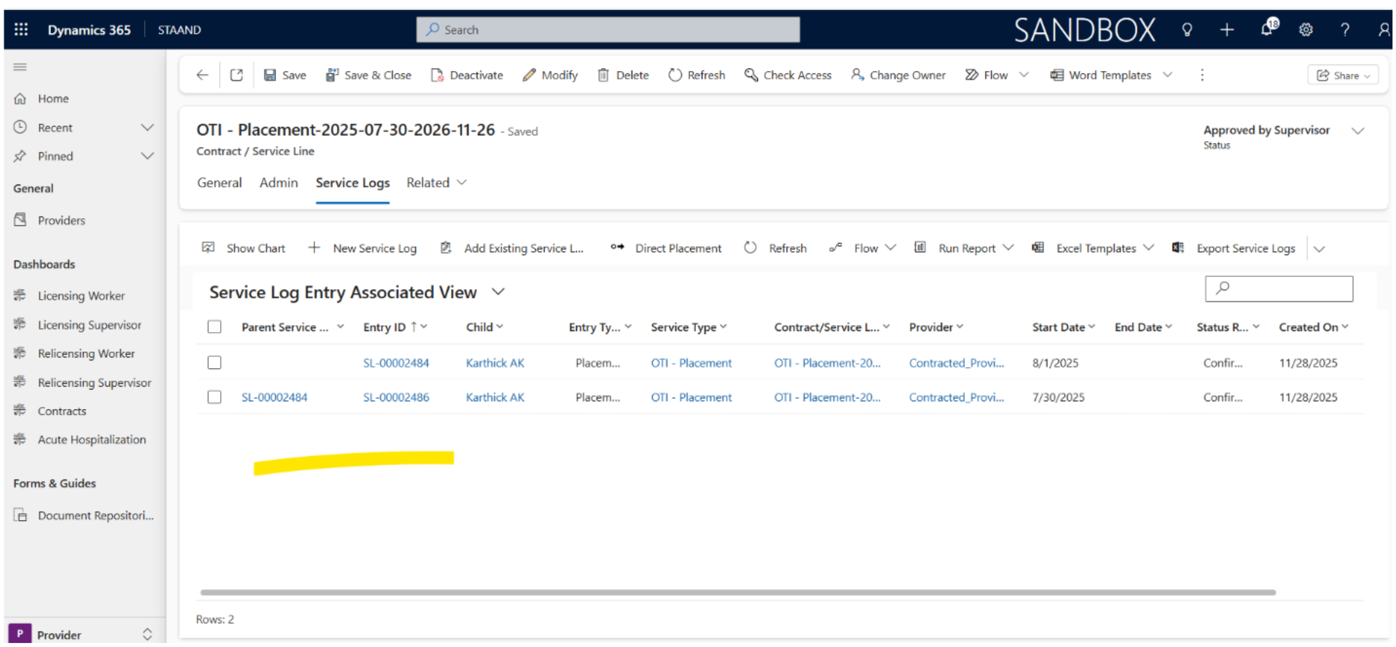
3. Create Service Line with Provider Contract Line And Service Log.



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



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

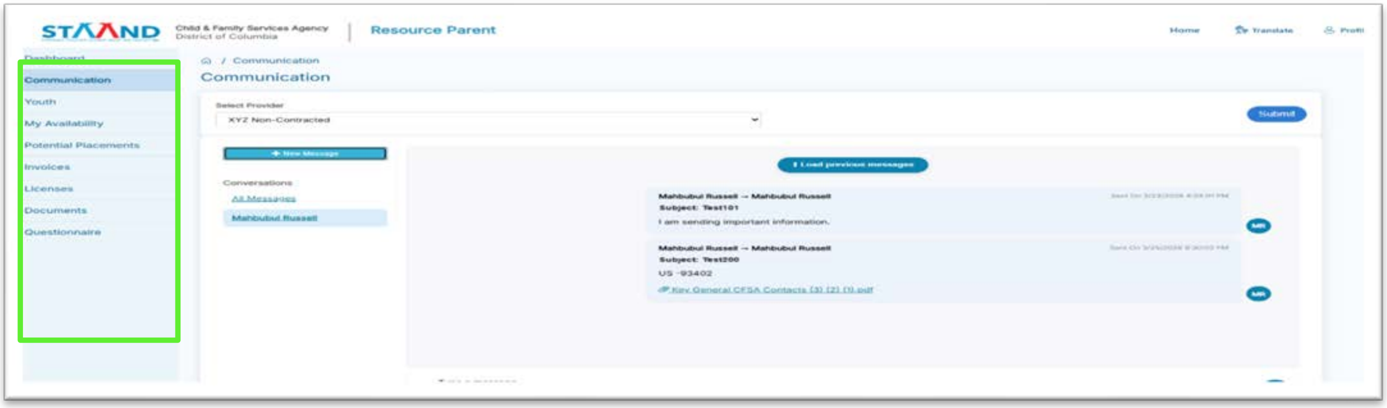


Portal Communications

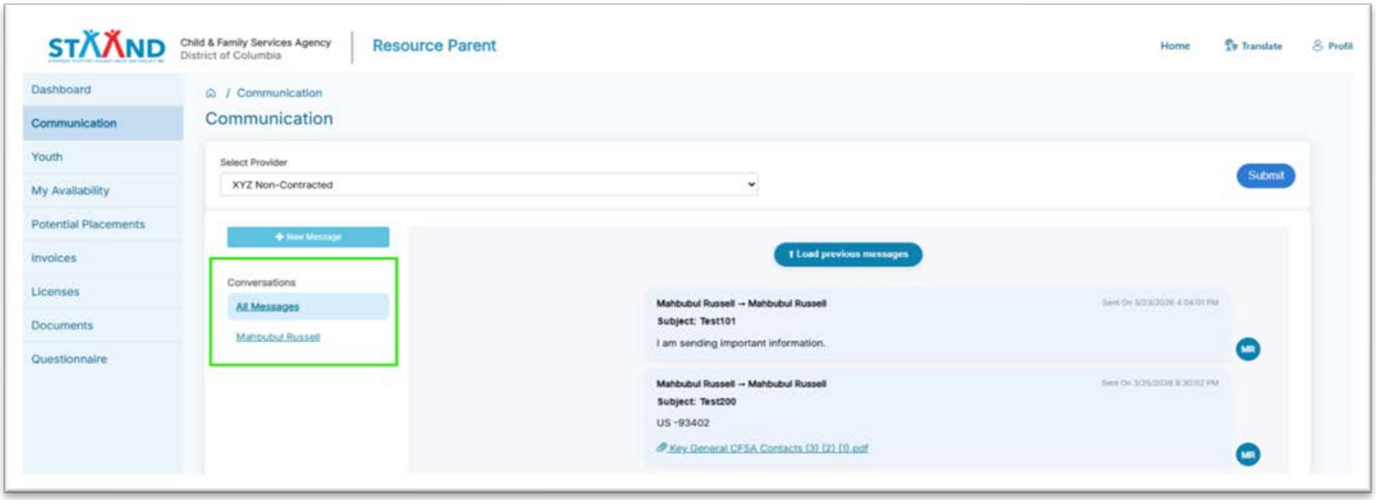
Portal Communications

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.

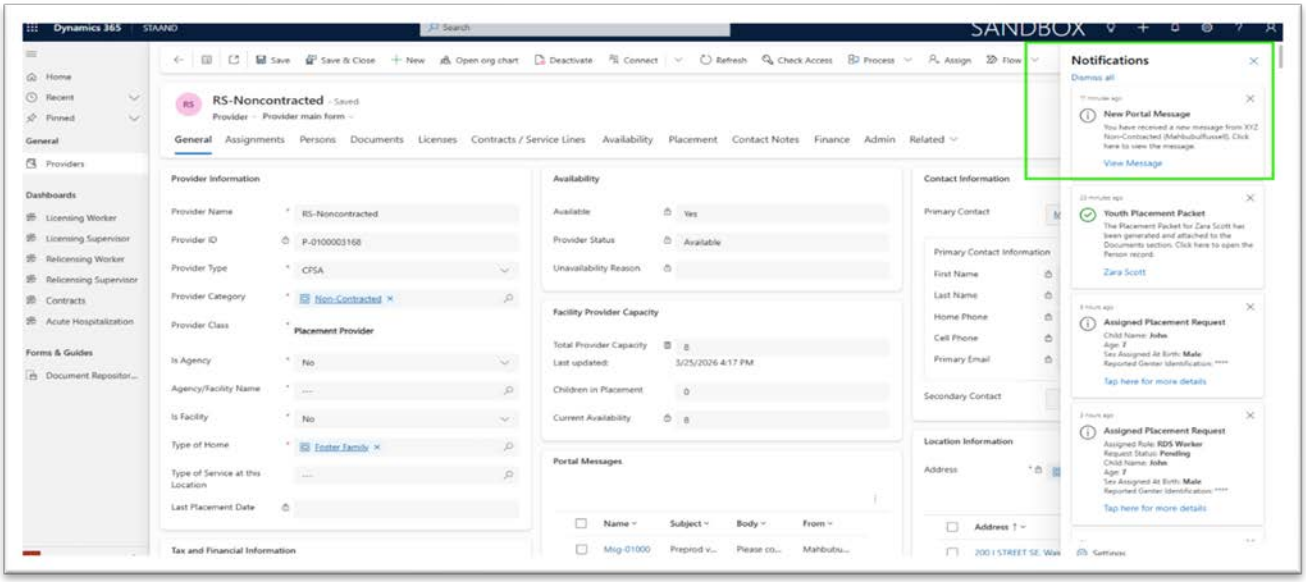
1. Log into Portal as Resource parent.
2. Click on the Communication panel on the left side of the screen.
3. Verify the User can see the list of messages with (Sender, Recipients, Timestamp, Message Body, Attachments (if applicable), An unread indicator for new messages.

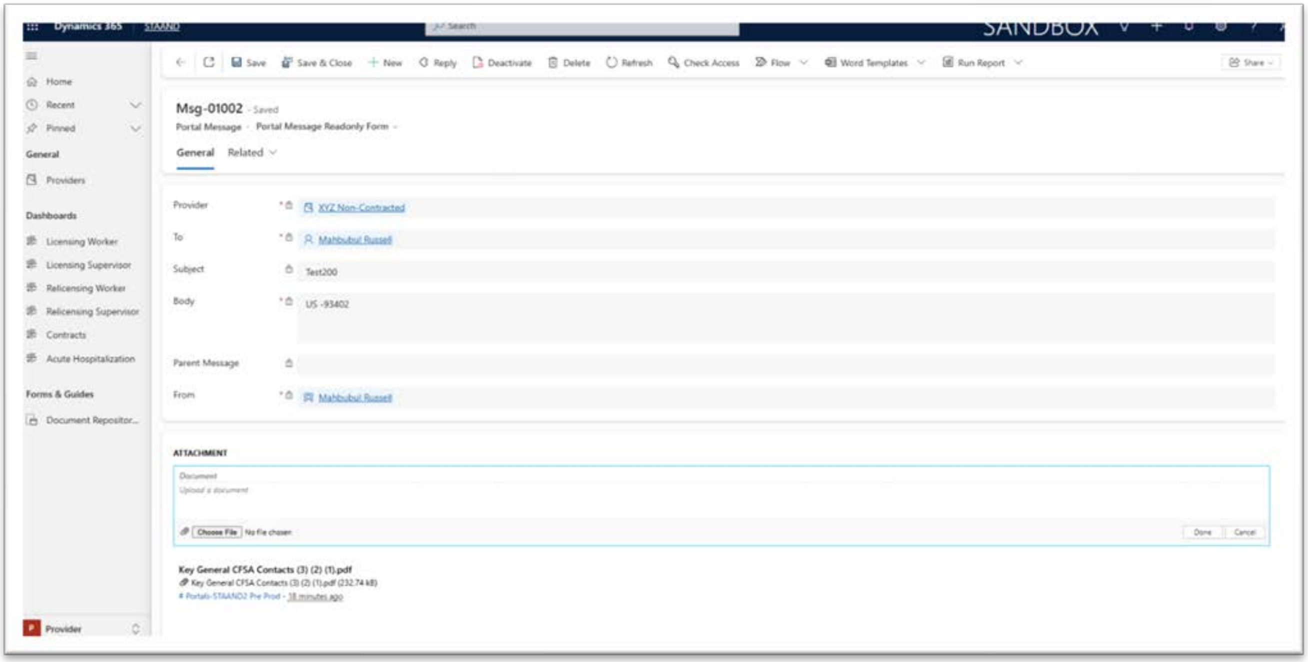


4. Messages can be filtered with Read and Unread notification.

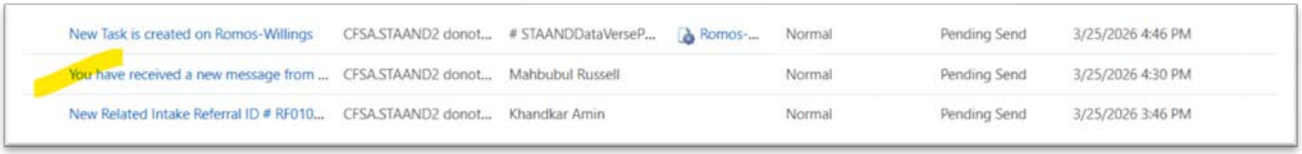


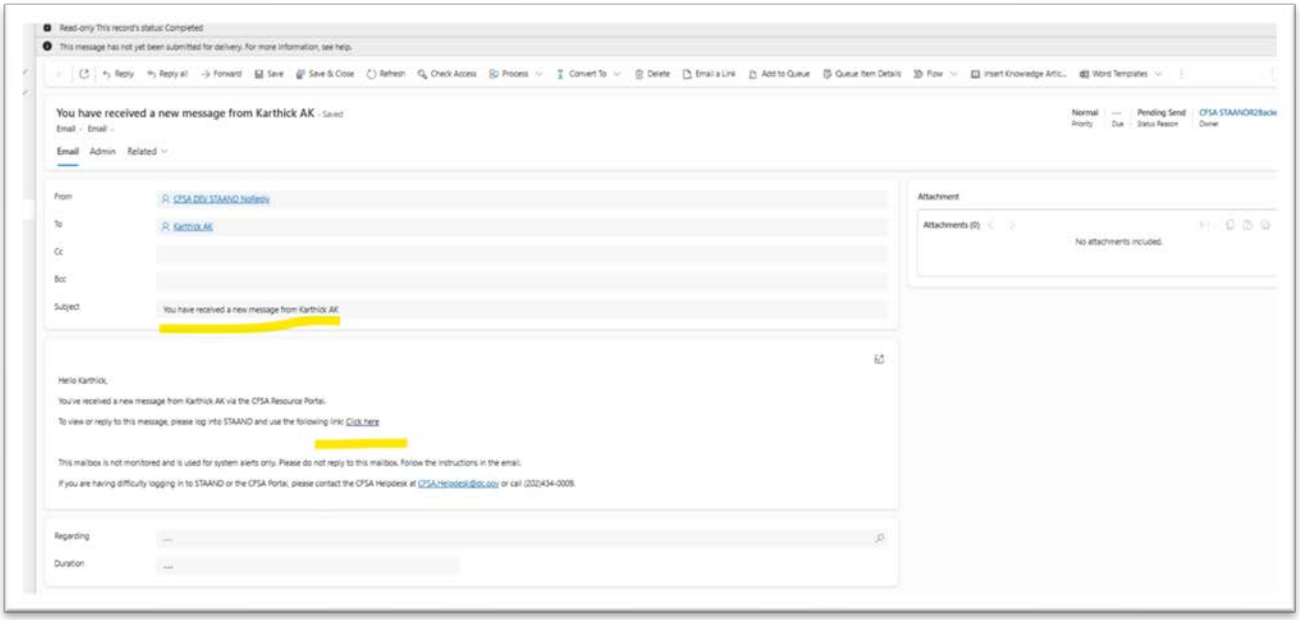
5. The message notification appears on the right side of the screen.



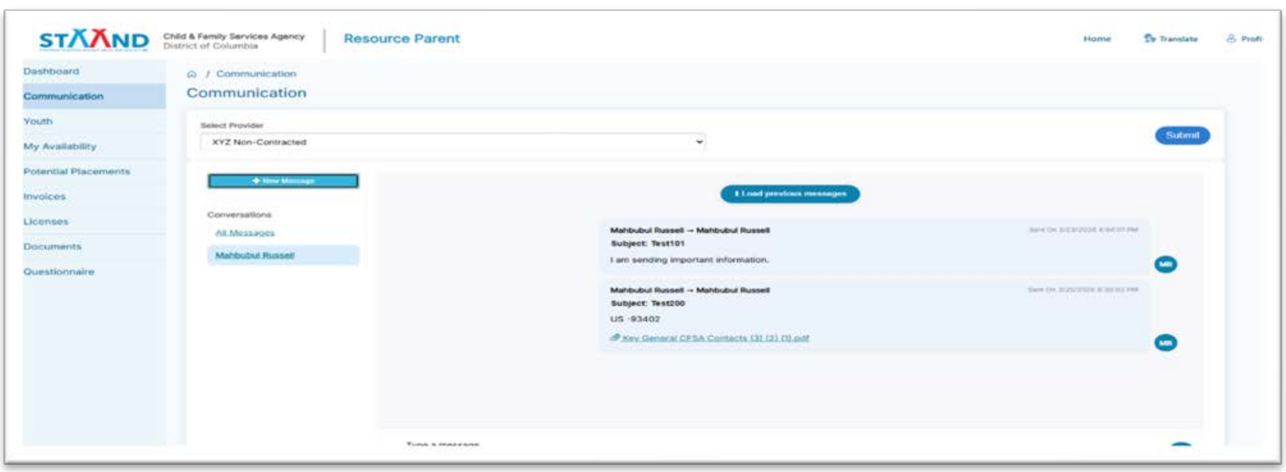


6. The user receives an email with a hyperlink to the record.





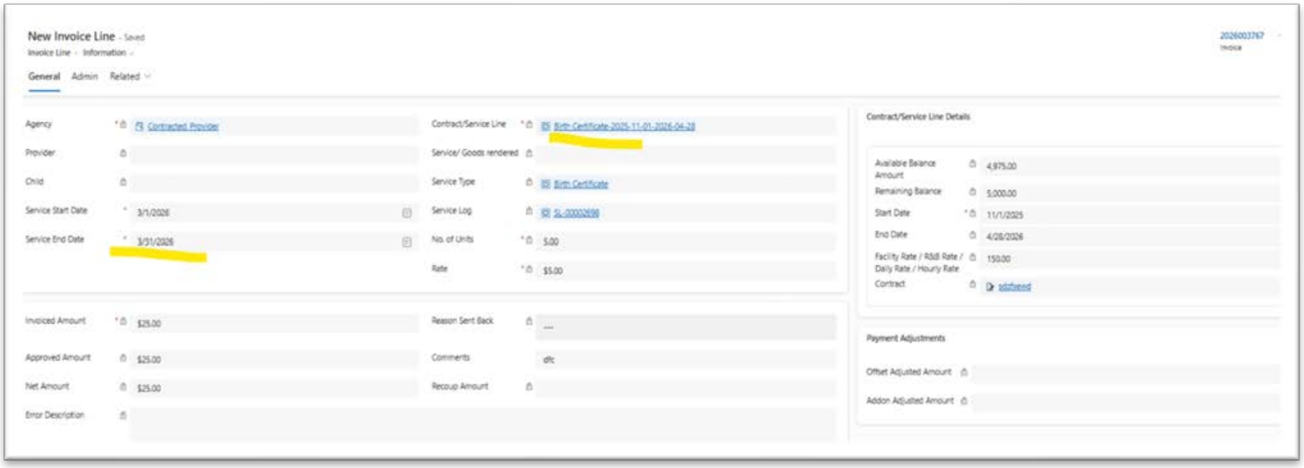
7. Click the New Message button to send a message.



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.



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.