

STAAND Technical User Guide for Provider



Version 2.0 - 2.6 Enhancements
Feb 2026





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General Navigation



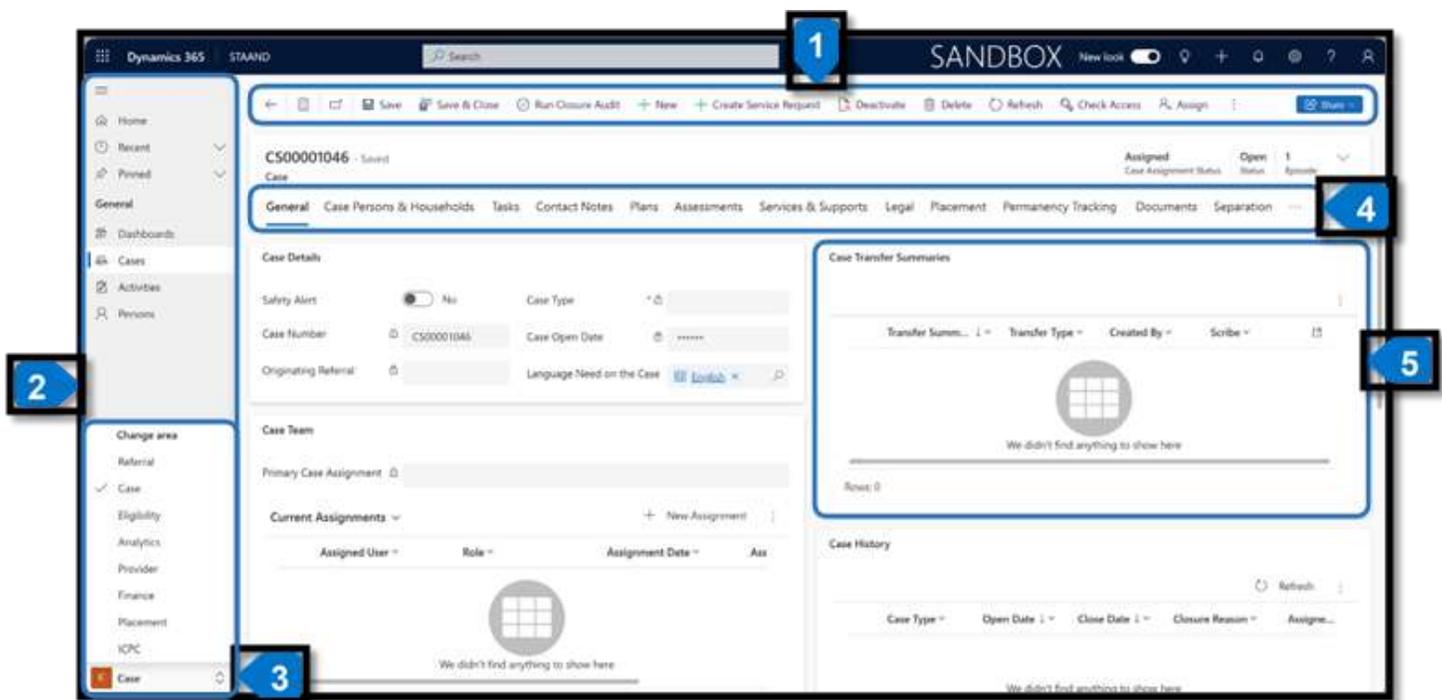
Key Navigational Features

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 shows a web application interface for a provider record. At the top left, there is a user profile for 'Joe Shmoe' with a 'Saved' status and a 'Provider main form' dropdown. On the top right, there are fields for 'Joe Shmoe' (Provider Name) and '---' (Last Placement Date). Below this is a horizontal 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 columns: 'Provider Information', 'Availability', and 'Contact Information'. The 'Provider Information' column contains 'Provider Name' (Joe Shmoe) and 'Provider ID' (P-0100000394). The 'Availability' column contains 'Available' (No) and 'Provider Status'. The 'Contact Information' column contains 'Primary Contact' and 'Secondary Contact', both with search icons.

Provider Records

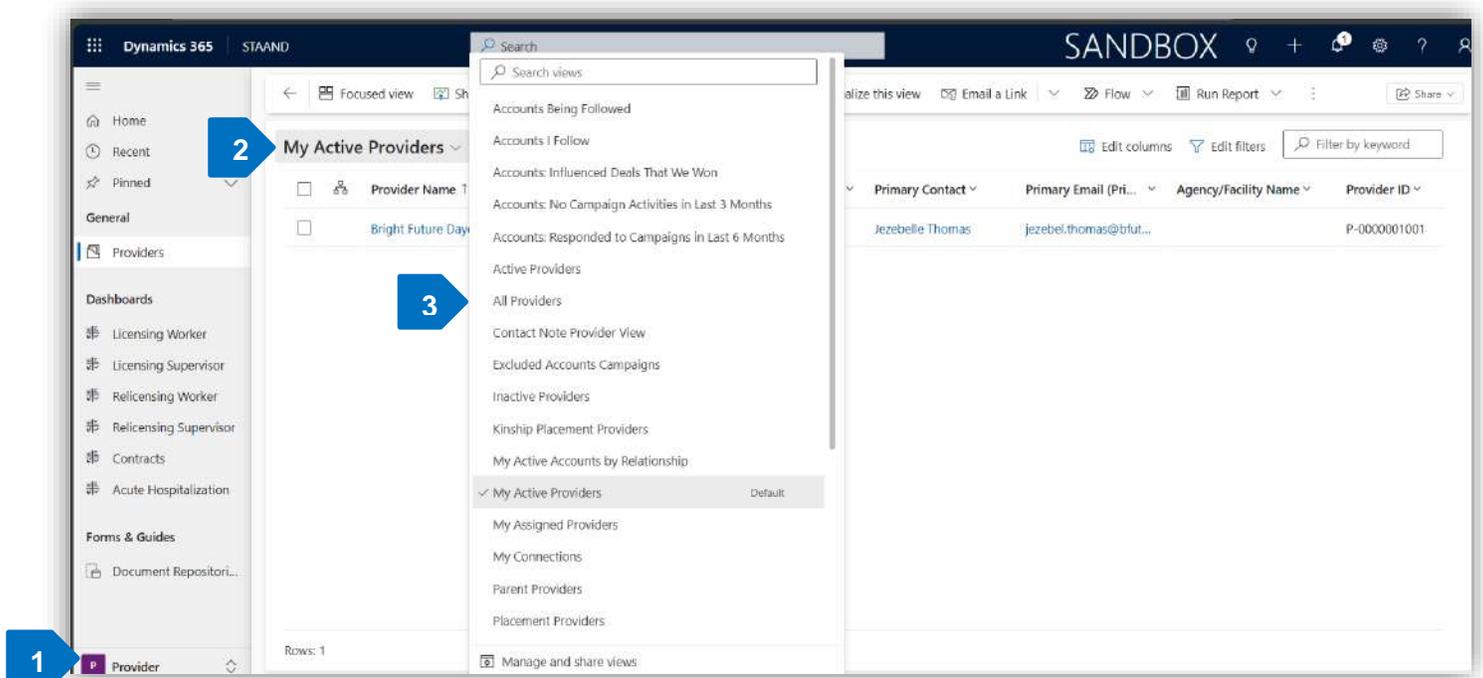


Conducting a Provider Person Search



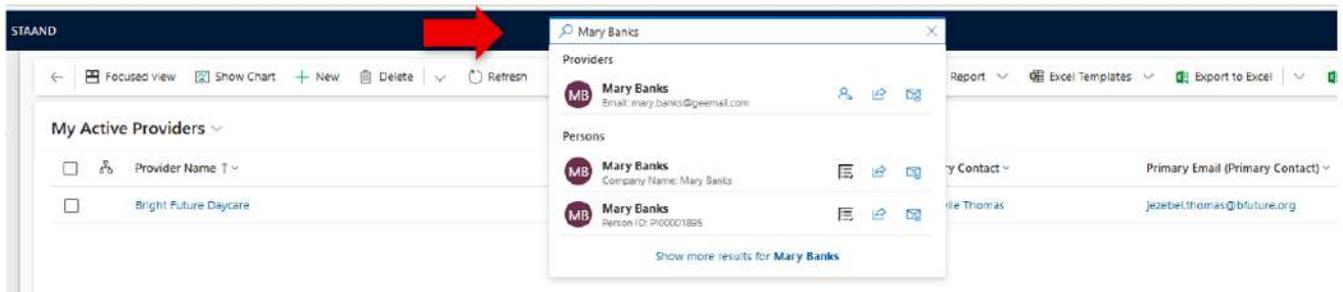
Provider Dashboard

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 contains the text 'Mary Banks'. A callout box next to the search bar lists the columns affected by the filter: Account Number, Email, Main Phone, Other Phone, Provider ID, and Provider Name. A red box also highlights the 'Provider' dropdown menu in the left-hand navigation pane, which is marked with a '1'. The table below shows a list of providers with columns for Provider Name, Main Phone, Address (City), Primary Contact, Primary Email, Status, Agency/Facility Name, and Provider ID. The first row is highlighted in blue.

Provider Name	Main Phone	Address (City)	Primary Contact	Primary Email (Primary Contact)	Status	Agency/Facility Name	Provider ID
CPSA - Placement Provider			CPSA Placement Provider		Active		
Mary Banks			Mary Banks	mary.banks@gmail.com	Active	CPSA - Placement Provider	
Classy Clothing Store			Classy Clothing	classyclothing@gmail.com	Active		
Working Together Group Home			Working Together Group Home W...	workingt@gmail.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	gregnewton@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	cewilliams@gmail.com	Active	CPSA - Placement Provider	PR-NC-01025
Substance Abuse Services			Judy Richards	judyrichards@gmail.com	Active		PR-NC-01026
TestProvider_8612			Jgpps_8071 Maib135	Jgpps_8071@gm.com	Active		P-0000001002
BVT_Testing_2352			Balakrishnan A	Balakrishnan.A.mst@egovicton...	Active		P-0000001001
Automation Testing_2859			Balakrishnan A	Balakrishnan.A.mst@egovicton...	Active		P-0000001000
Bright Future Daycare		Washington	Isabelle Thomas	isabelle.thomas@ofuture.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' and a search icon. The table below shows the search results, with the first row highlighted in blue. A callout box with a '3' indicates that the provider's name 'Mary Banks' has populated in the 'Provider Name' column.

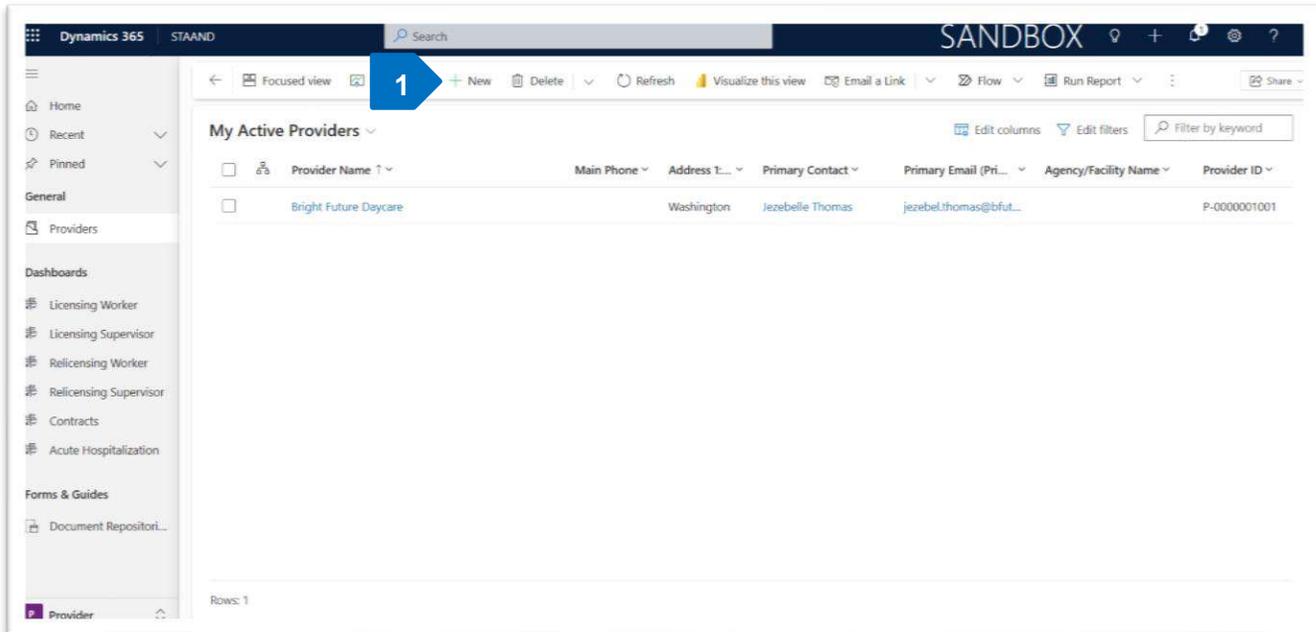
Provider Name	Main Phone	Address (City)	Primary Contact	Primary Email (Primary Contact)	Status	Agency/Facility Name	Provider ID
Mary Banks			Mary Banks	mary.banks@gmail.com	Active	CPSA - Placement Provider	PR-NC-01014

Creating Providers



How To: Create a Service Provider

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



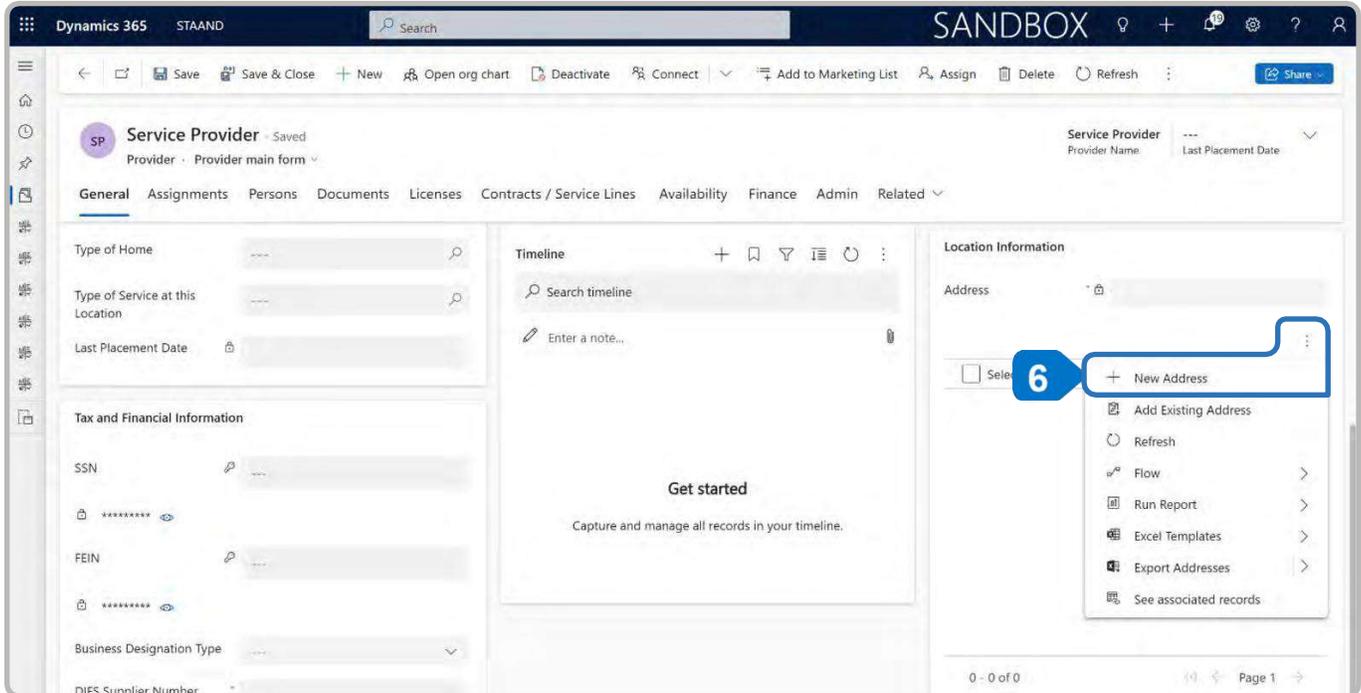
2. Complete all fields, including Provider Name, Type, and Class.
3. Select Service Provider for the Provider Category field.
4. Enter a Primary Contact within the Contact information sub-grid (secondary contact can be added as needed).
5. Select Save.

The screenshot shows the Dynamics 365 'New Provider' form. 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 includes 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 includes fields for Available (set to 'No'), Provider Status, Unavailability Reason, Total Provider Capacity, Children in Placement, and Current Availability. The 'Contact Information' section includes fields for Primary Contact (with callout 4) and Secondary Contact. The 'Location Information' section includes fields for Address, Main Phone, Other Phone Number, Email, Extension, and Distance. The form is set in 'SANDBOX' mode. Callout 5 is located in the top left corner of the Dynamics 365 interface.

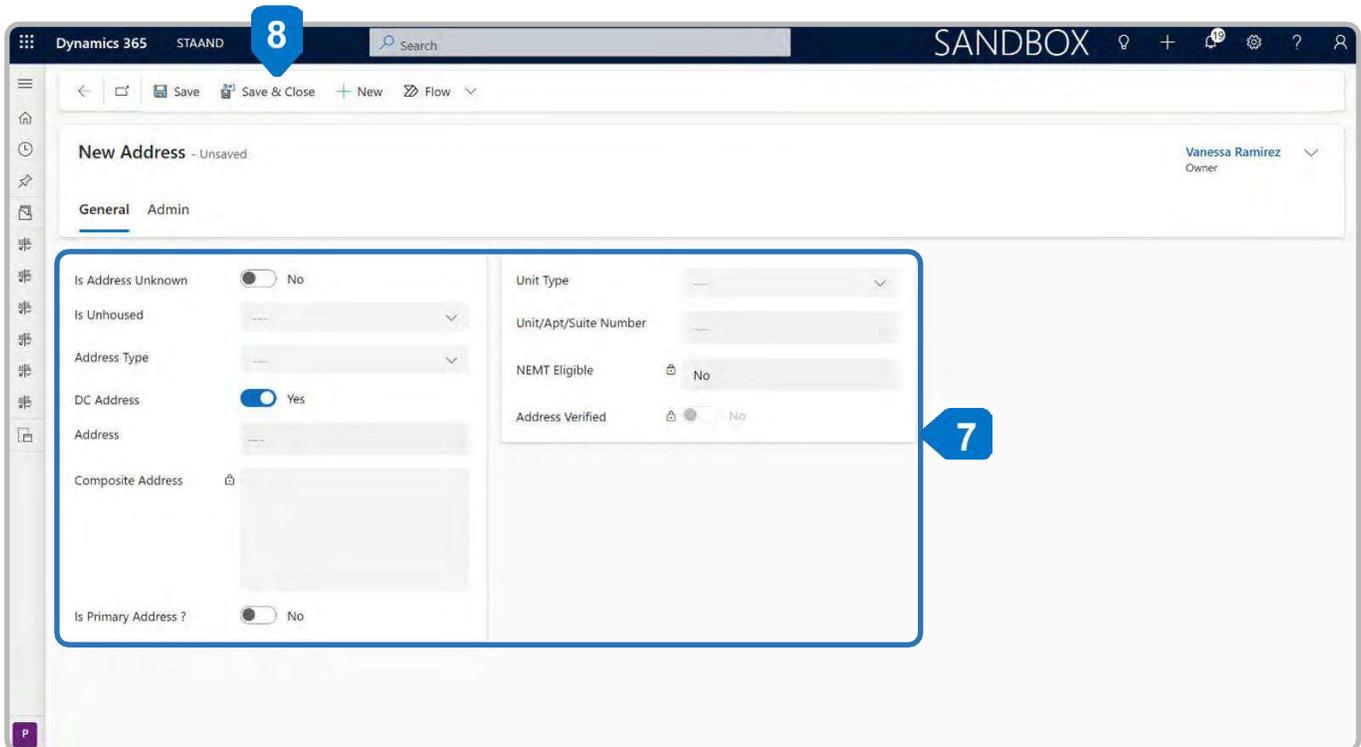
Note:

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

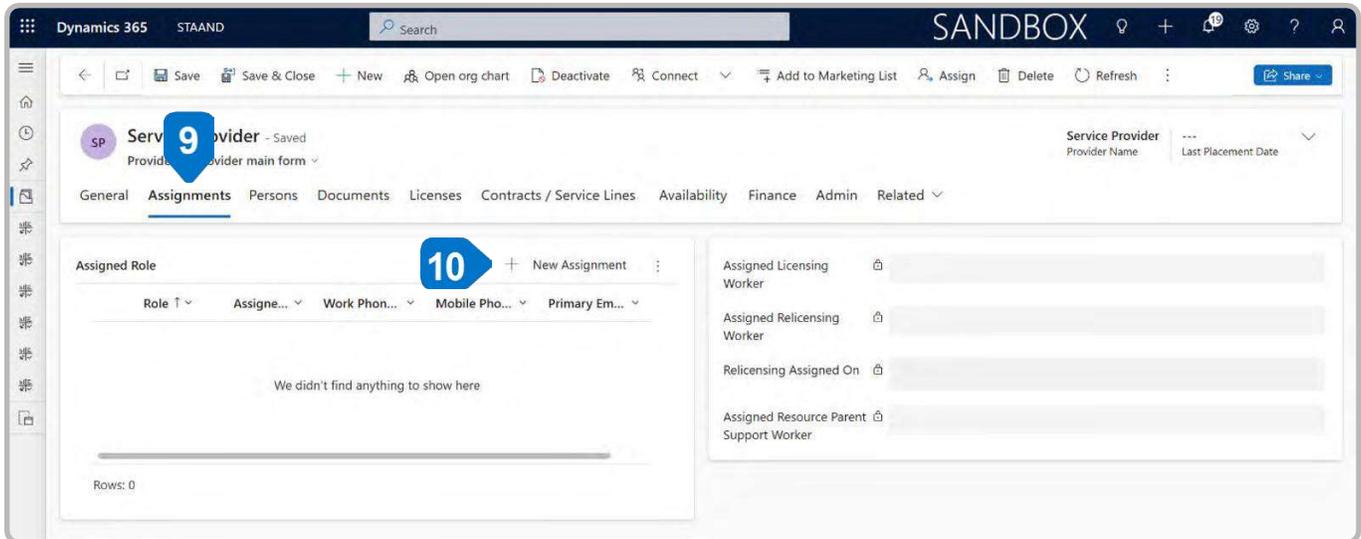
- From the Location Information sub-grid, select + New Address. If not visible, select the more commands icon to view more options:



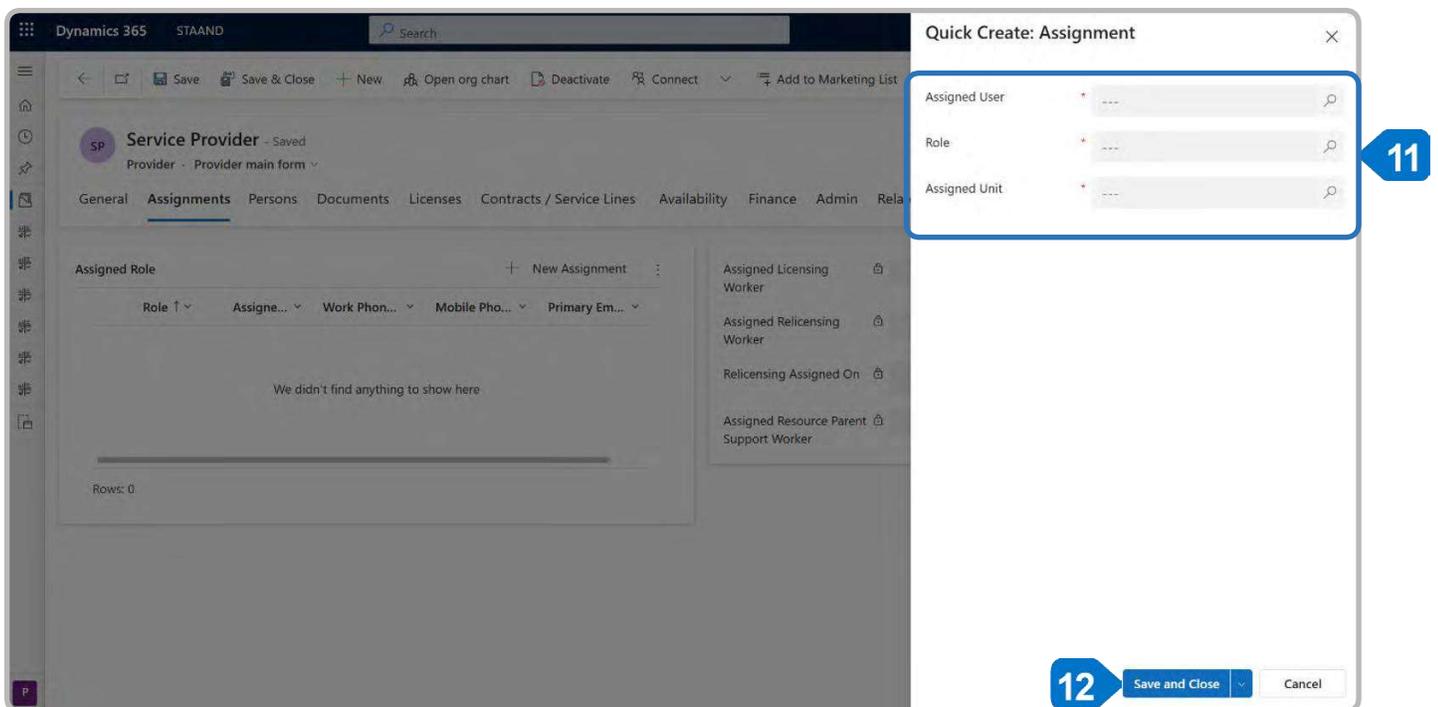
- Complete all fields.
- Select Save & Close.



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 shows 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 'Service Provider' with 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 is visible, featuring 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. The 'Active Person Relationships' section is also visible with 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.

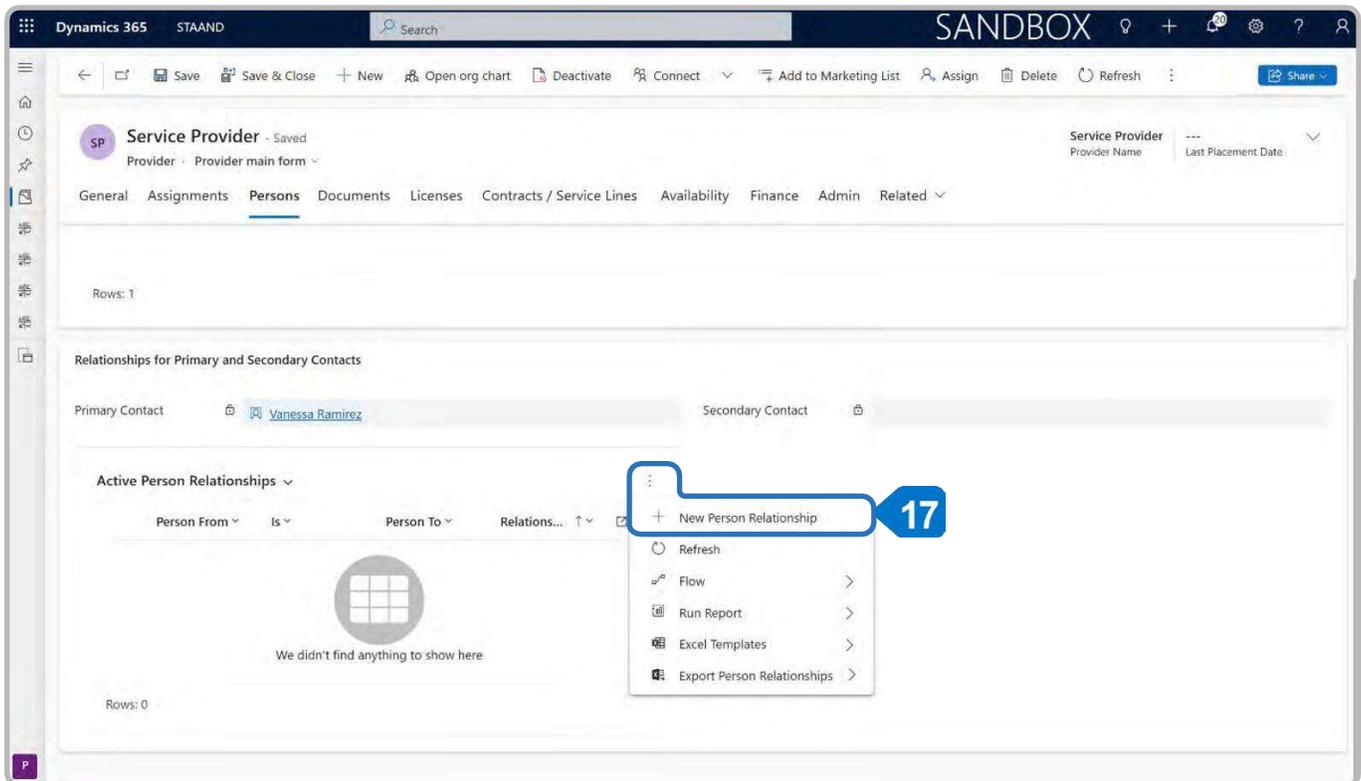
The screenshot shows the Dynamics 365 interface for a 'Service Provider' record. A 'Quick Create: Provider Person' window is open, allowing for the addition of a new person to the provider. The window contains the following fields:

- Provider: Service Provider
- Person: ---
- Member Type: Adult Household Member
- Start Date: ---
- End Date: ---

A blue callout box with the number 15 is positioned to the right of the Member Type dropdown. At the bottom of the window, a blue callout box with the number 16 points to the 'Save and Close' 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.

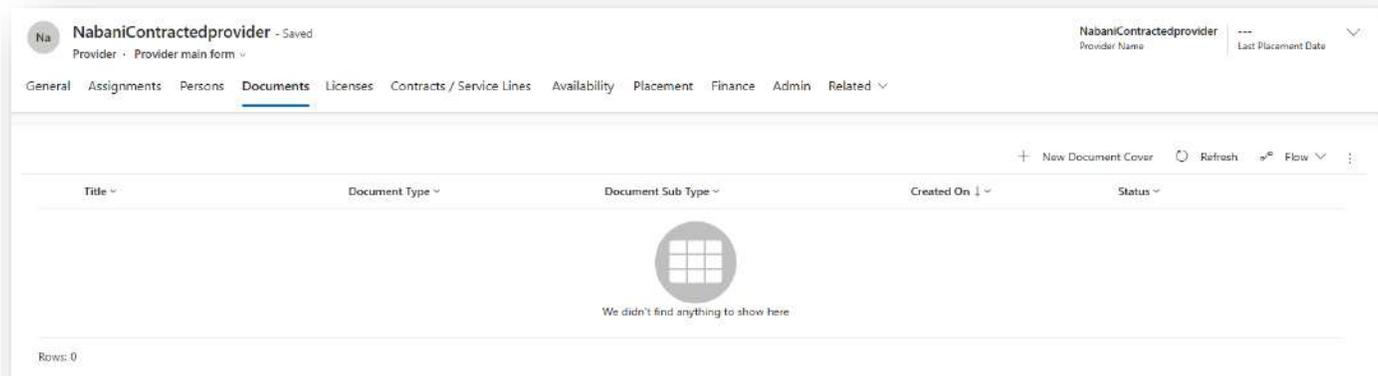
17. To create a New Person Relationship, from the Active Persons Relationships sub-grid, select + New Person Relationship. If not visible, select the more commands option to view more options.



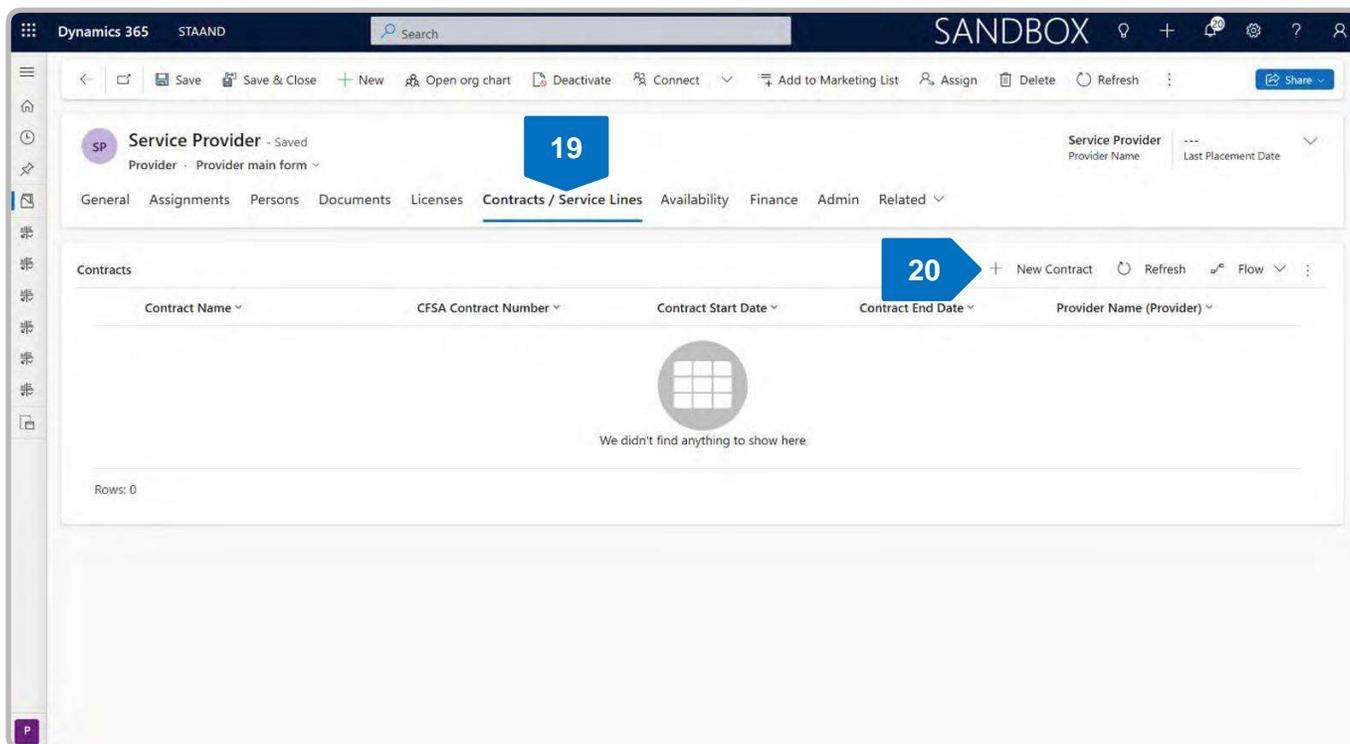
Important Tip:

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 shows the Dynamics 365 interface for creating a new contract. The top navigation bar includes 'Dynamics 365', 'STAAN', a search bar, and 'SANDBOX'. The form title is 'New Contract' and it is categorized as 'Contract - Provider Contract'. The 'General' tab is active. The form contains several required fields: Provider (with a 'Service Provider' link), Contract, CFSA Contract Number, Industry ID, Payment Type (set to 'Regular Paid'), Aggregate Contract Amount, Calculated Contract Amount, Contract Amount, Contract Date, Contract Start Date, Contract End Date, and Status (set to 'Active'). A 'Contract / Service Lines' sub-grid is located at the bottom of the form. A blue callout box with the number '21' is positioned over the top navigation bar, and another blue callout box with the number '22' is positioned over the 'Save' button in the top right corner of the form area.

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.

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: ---

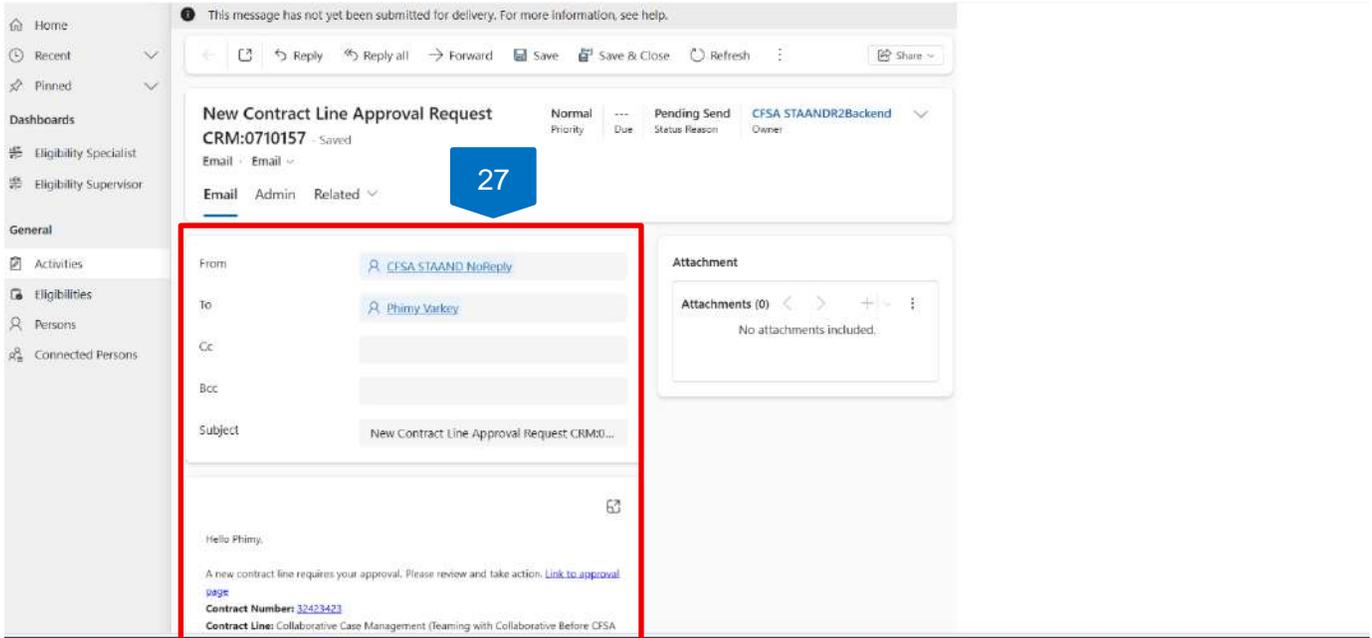
Facility Rate / R & B Amount: --- Remaining Balance: --- 30,000.00

Case Management Rate: --- Comments: ---

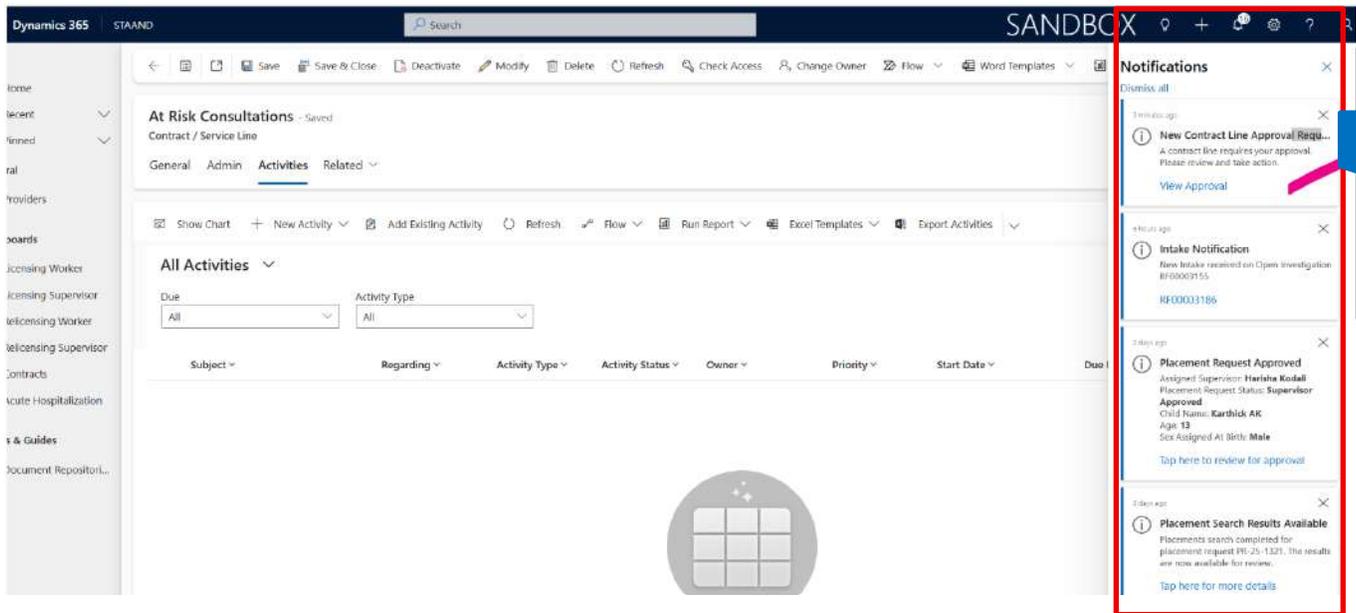
Contracted Capacity: ---

Medicaid Eligible: No

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

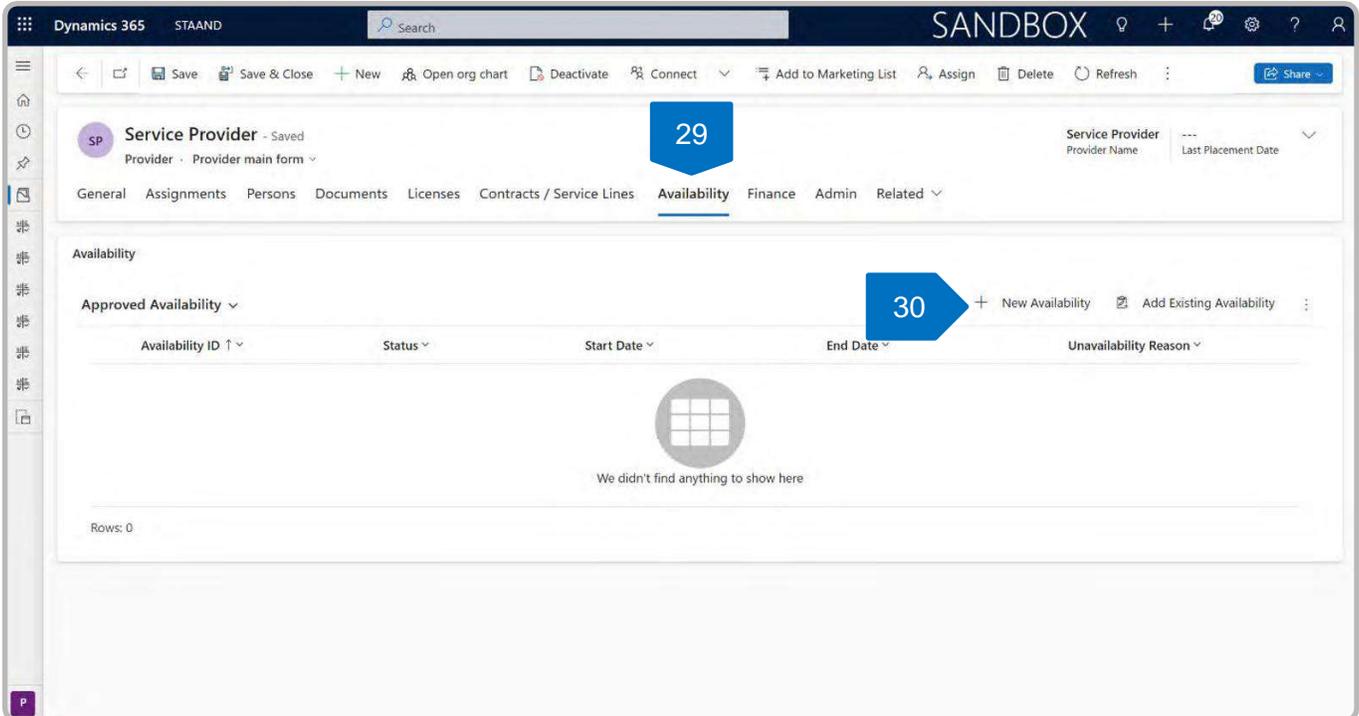


28. The approver will receive a system generated notification and an email notification.



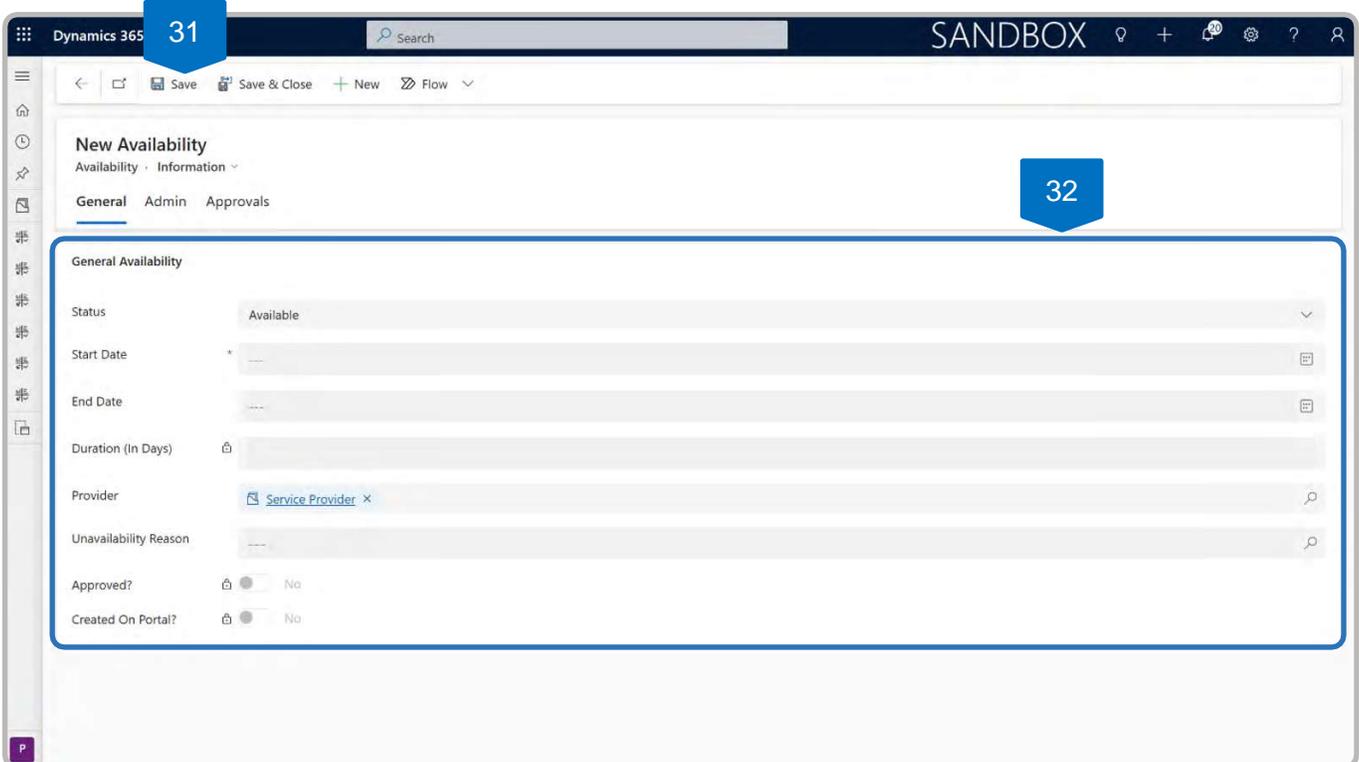
29. To Add New Availability, select the Availability tab.

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.

The screenshot displays the Dynamics 365 user interface for record AV-001399. The top navigation bar shows 'Dynamics 365', 'STAAAN', and '33' in a blue box. The right side of the header includes 'SANDBOX', a search bar, and various utility icons. Below the header is an action toolbar with buttons for Save, Submit, Save & Close, New, Deactivate, Delete, Refresh, Check Access, Change Owner, Flow, and Share. The main content area is titled 'AV-001399 - Saved' and shows the 'General Availability' form. The form has tabs for 'General', 'Admin', 'Approvals', and 'Related'. The 'General Availability' section contains the following fields:

- Status: Available (dropdown)
- Start Date: 5/15/2025 (calendar icon)
- End Date: --- (calendar icon)
- Duration (In Days): [empty field]
- Provider: Service Provider (lookup icon)
- Unavailability Reason: --- (lookup icon)
- Approved?: No (toggle switch)
- Created On Portal?: No (toggle switch)

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 contains one row 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 the row.

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

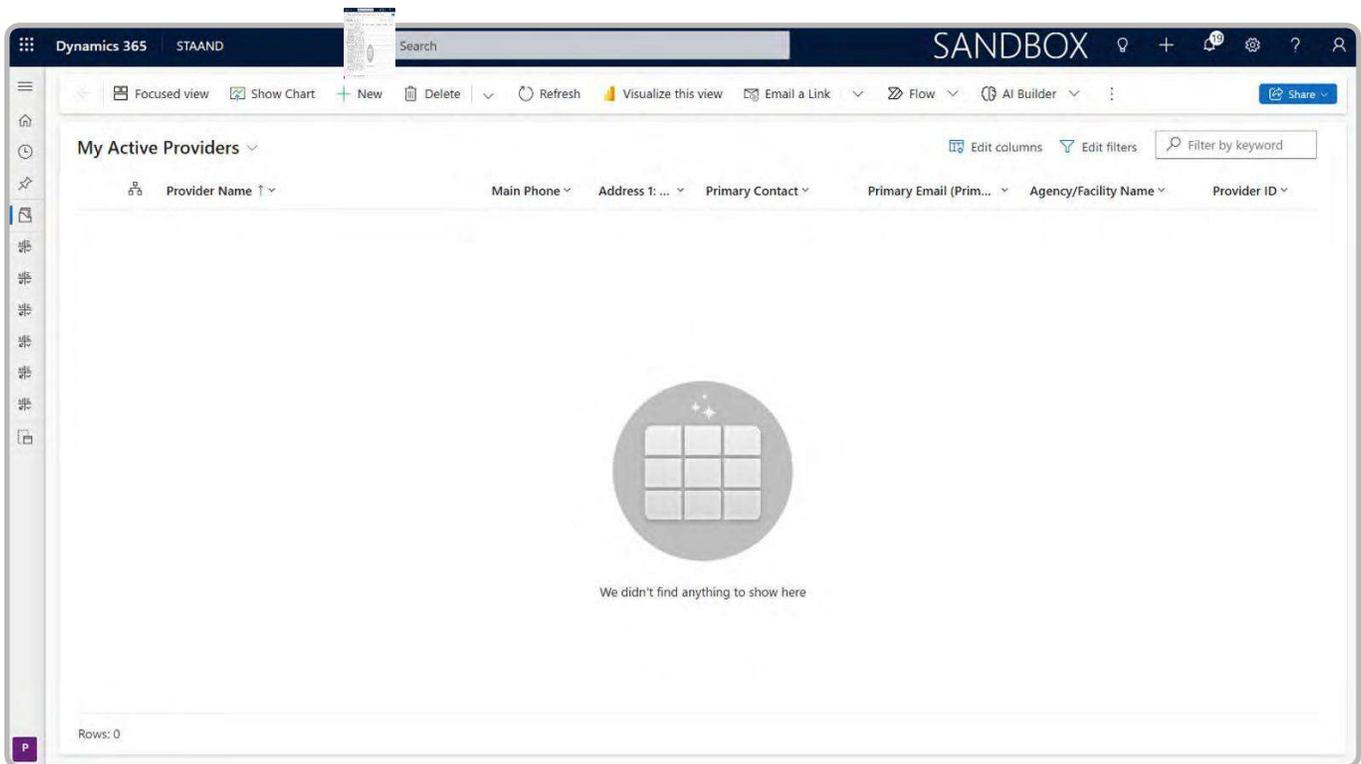
The screenshot shows the Microsoft Dynamics 365 interface for a 'Parent Agency Provider' record. The record is titled 'Parent Agency Provider - Saved' and has a '37' badge. The 'Finance' tab is selected, showing two empty tables: 'Episodic Service Logs' and 'Invoices'. Both tables have columns for various fields but contain no data, with a message 'We didn't find anything to show here' and 'Rows: 0' displayed below each table header.

Episodic Service Logs Table Columns: Entry ID, Assigned Agency, Provider, Child, Start Date, End Date, Contract (Contract/...), Contract/Service ..., Service Type (C...), Created On.

Invoices Table Columns: Invoice Nu..., Agency/Prov..., Service Type, Invoice Amo..., Invoice Approved Am..., Invoice Paid Amo..., Invoice Submite..., Invoice Sta..., 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.

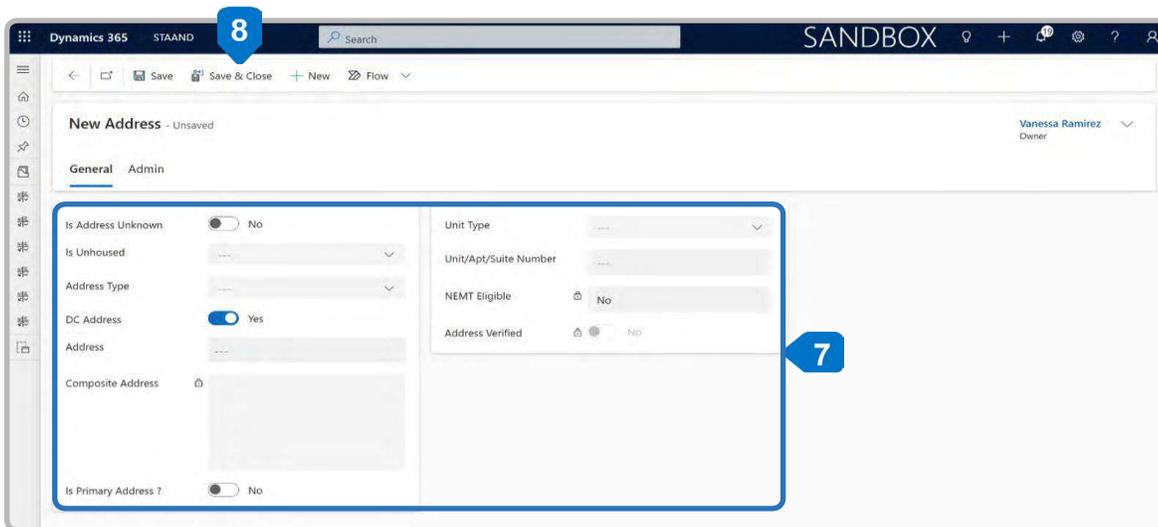
The screenshot shows the 'New Provider' form in Dynamics 365. The form is divided into several sections: 'Provider Information', 'Availability', 'Contact Information', and 'Location Information'. Callout 2 points to the 'Provider Category' dropdown menu. Callout 3 points to the 'In Placement' dropdown menu. Callout 4 points to the 'Primary Contact' field in the 'Contact Information' section. The form also includes fields for 'Provider Name', 'Provider ID', 'Provider Type', 'Provider Class', 'Is Agency', 'Agency/Facility Name', 'Is Facility', 'Type of Home', 'Type of Service at this Location', 'Last Placement Date', 'Total Provider Capacity', 'Last updated', 'Current Availability', 'Timeline', 'Address', 'Main Phone', 'Other Phone Number', 'Email', 'Extension', and 'Distance'. The top navigation bar shows 'Dynamics 365' and 'SANDBOX'.

Note:

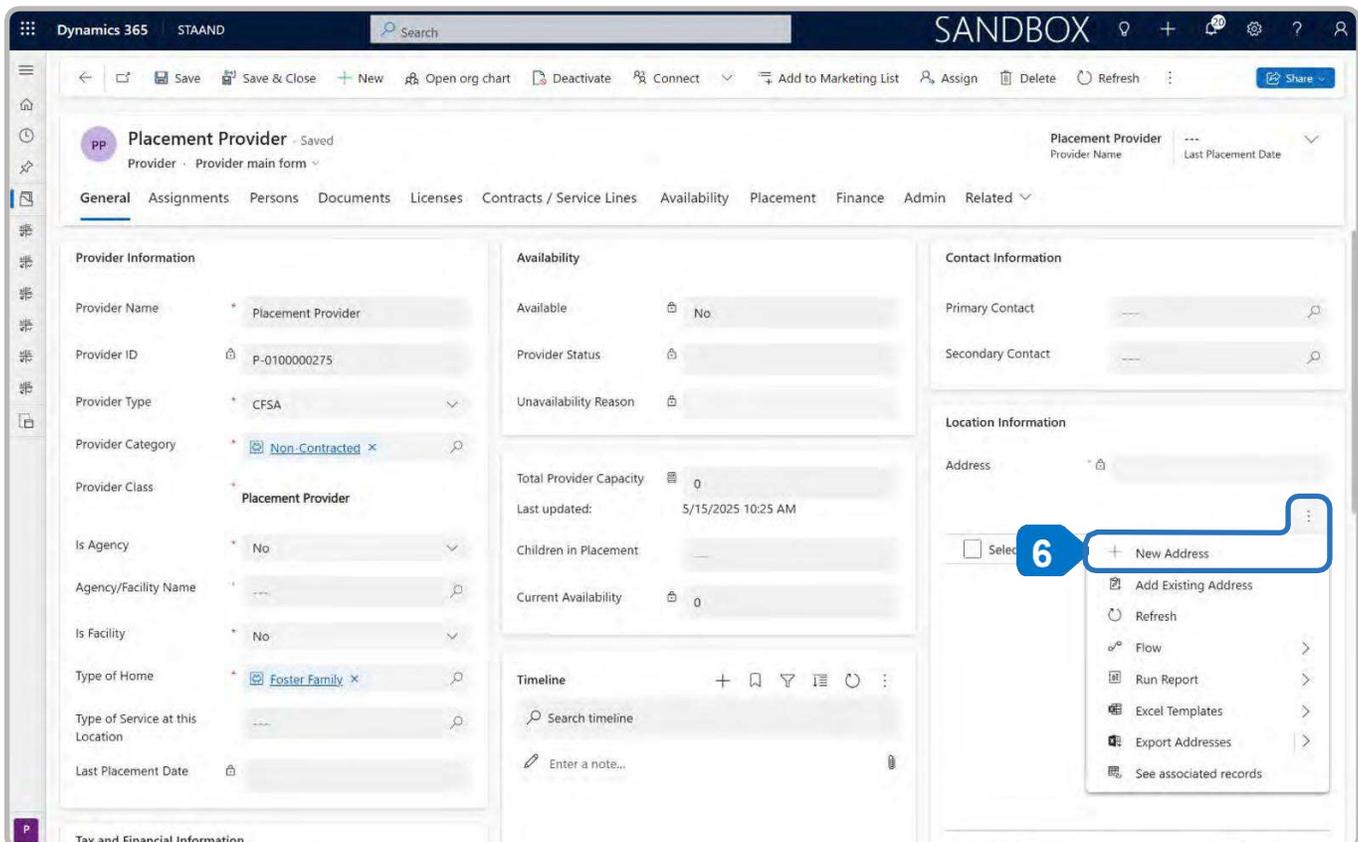
When selecting a Provider Category, a Provider can be classified as Contracted, Non-Contracted or both.

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.

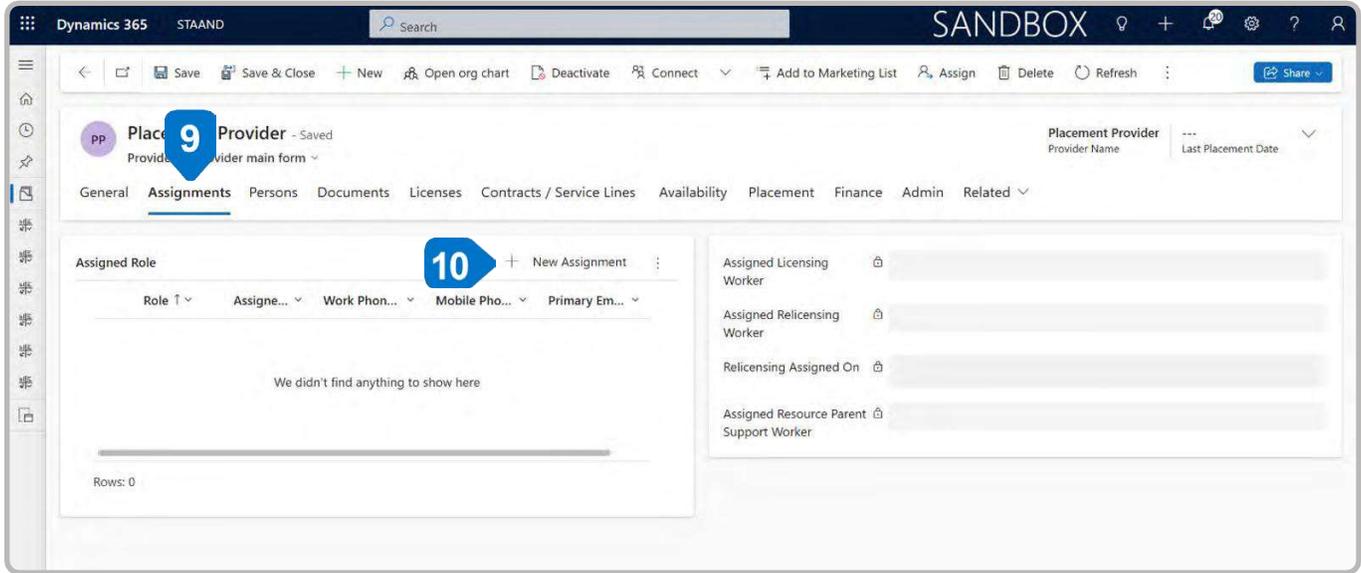


- From the Location Information subgrid, select + New Address or Add Existing Address (if you added it to the person record already in step 4). If not visible, select the more commands icon to view more options.

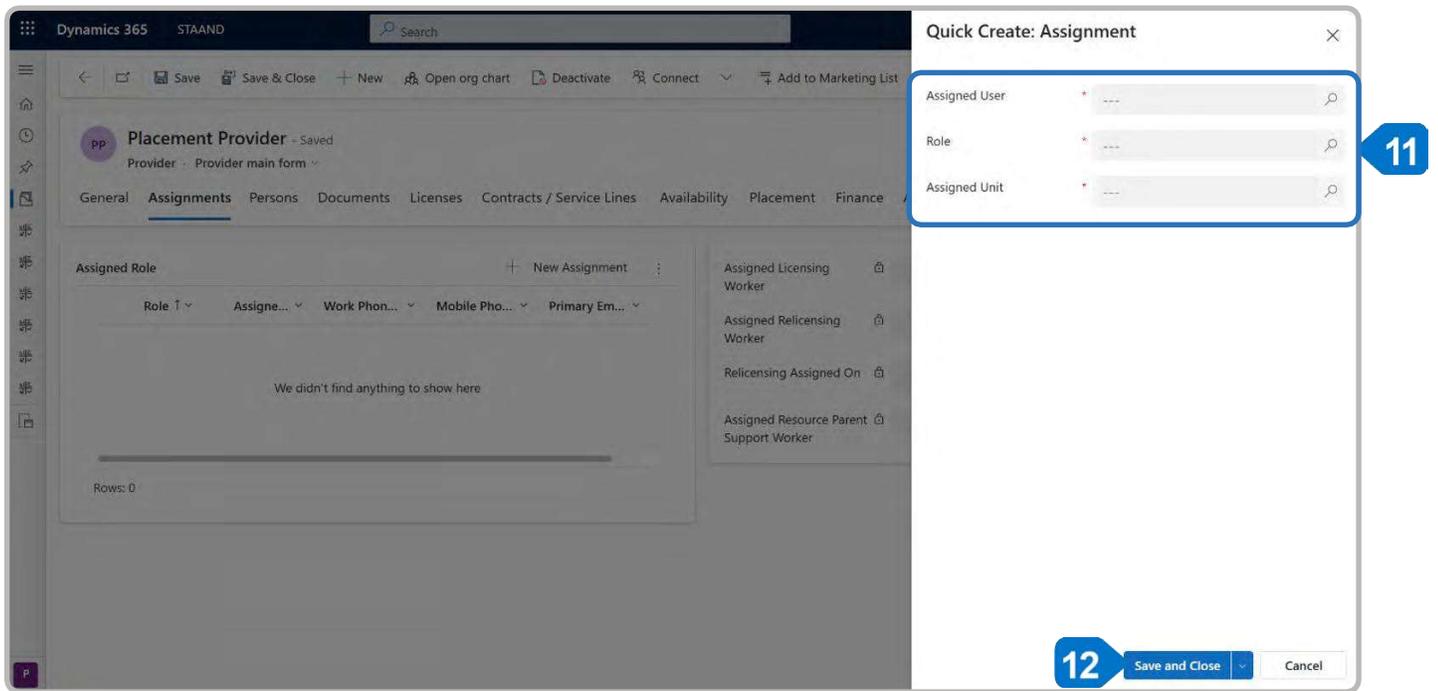


- Complete all fields.
- Select Save & Close. Note: addresses are verified via an integration with a database in real time and you are encouraged to refrain from adding unverified addresses to STAAND.

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



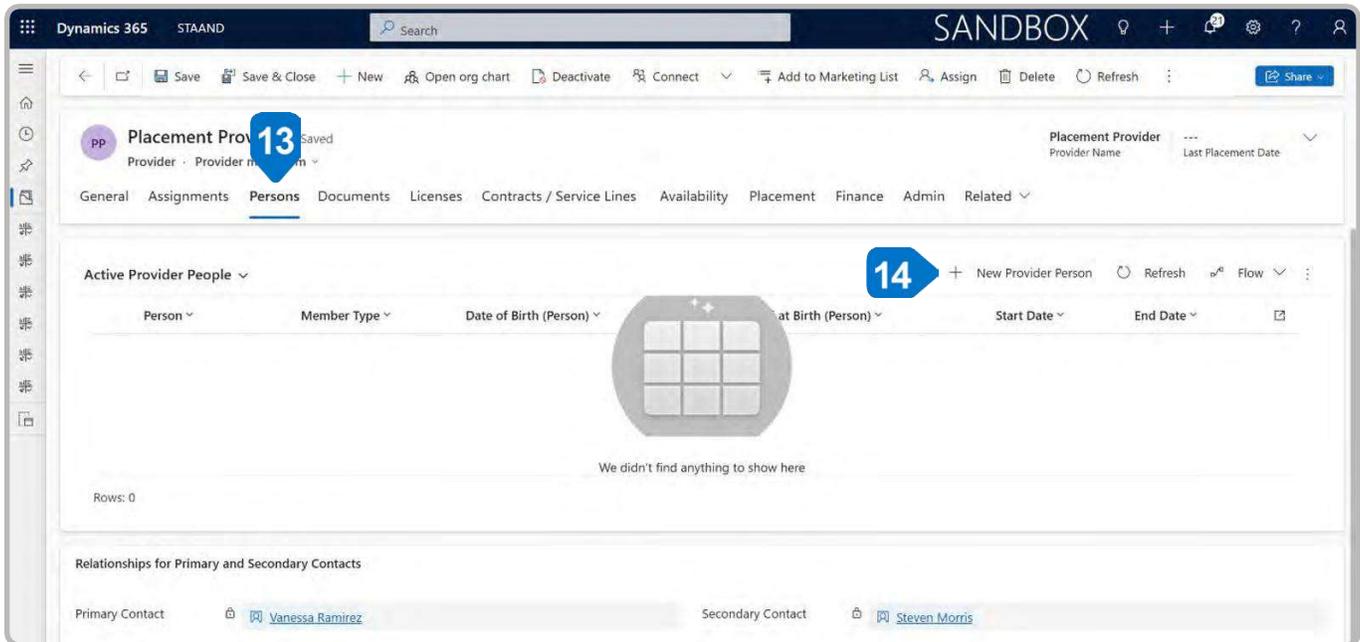
11. Complete all fields within the Quick Create: Assignment window.
12. Select Save and Close.



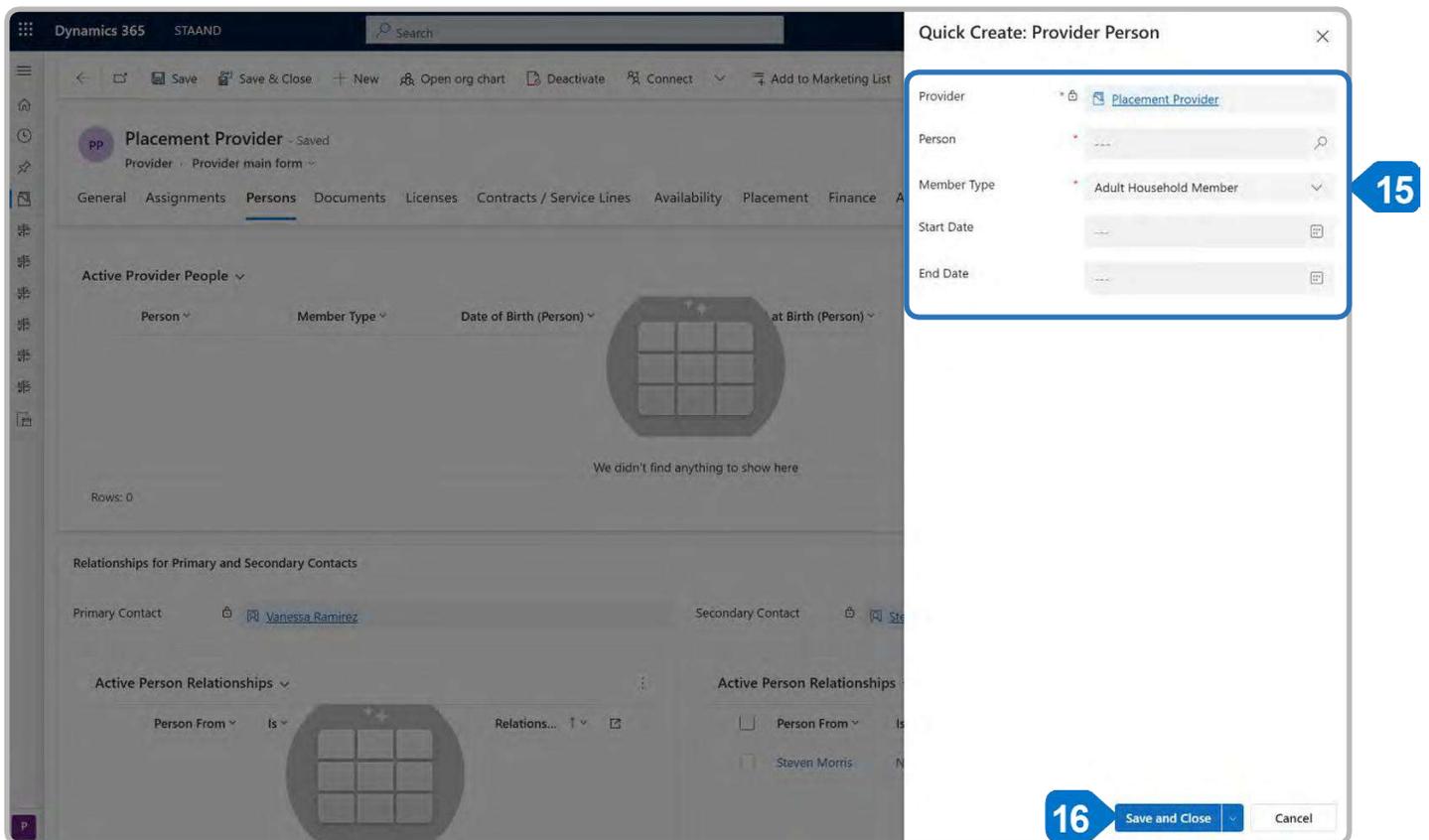
Important Tip:

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.

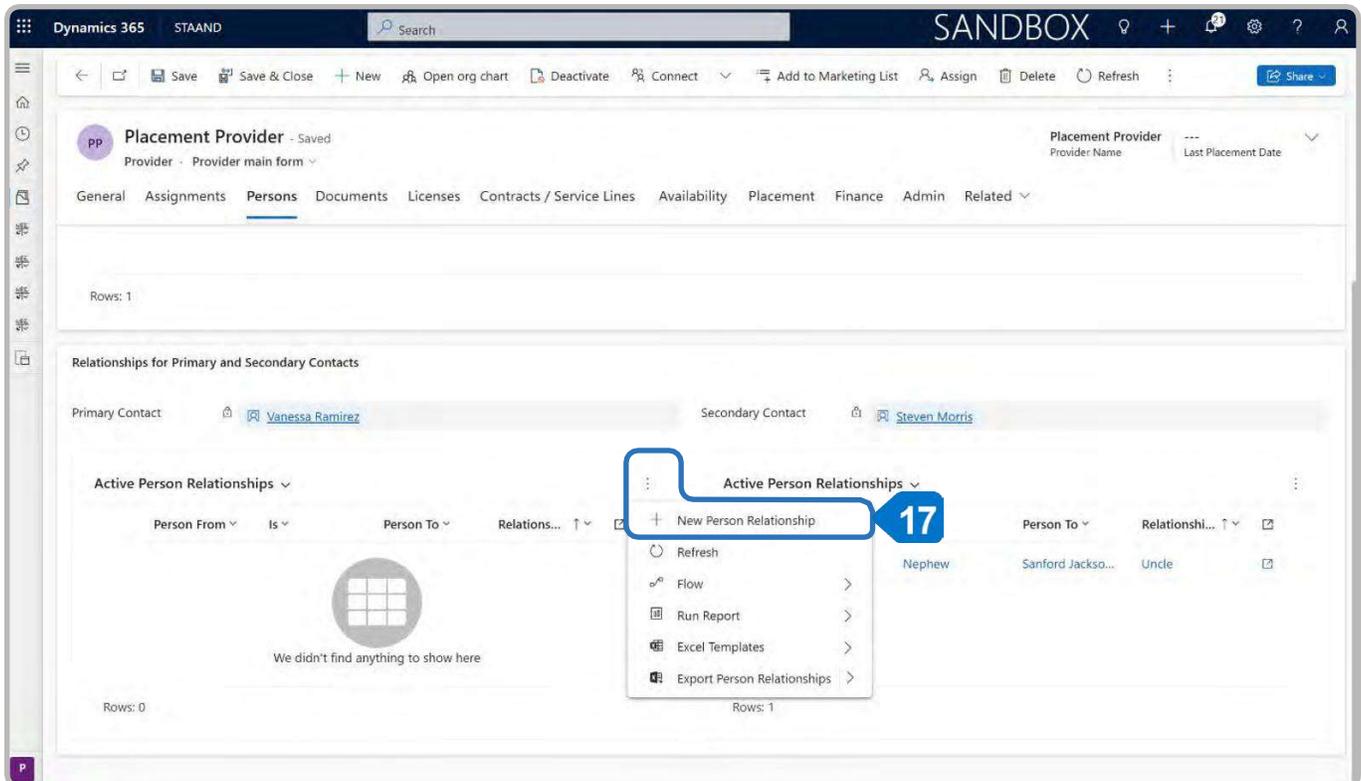


15. Complete all fields within the Quick Create: Provider Person window.
16. Select Save and Close.



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.

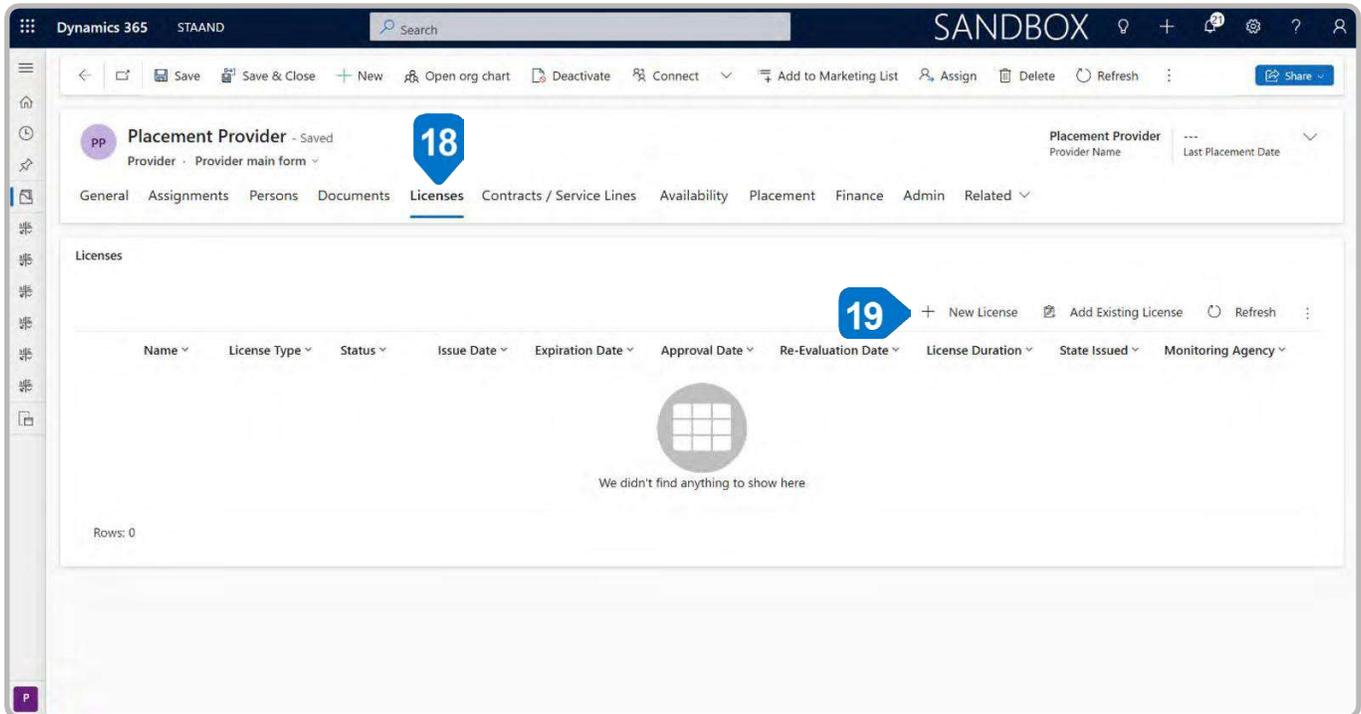


Important Tip:

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.



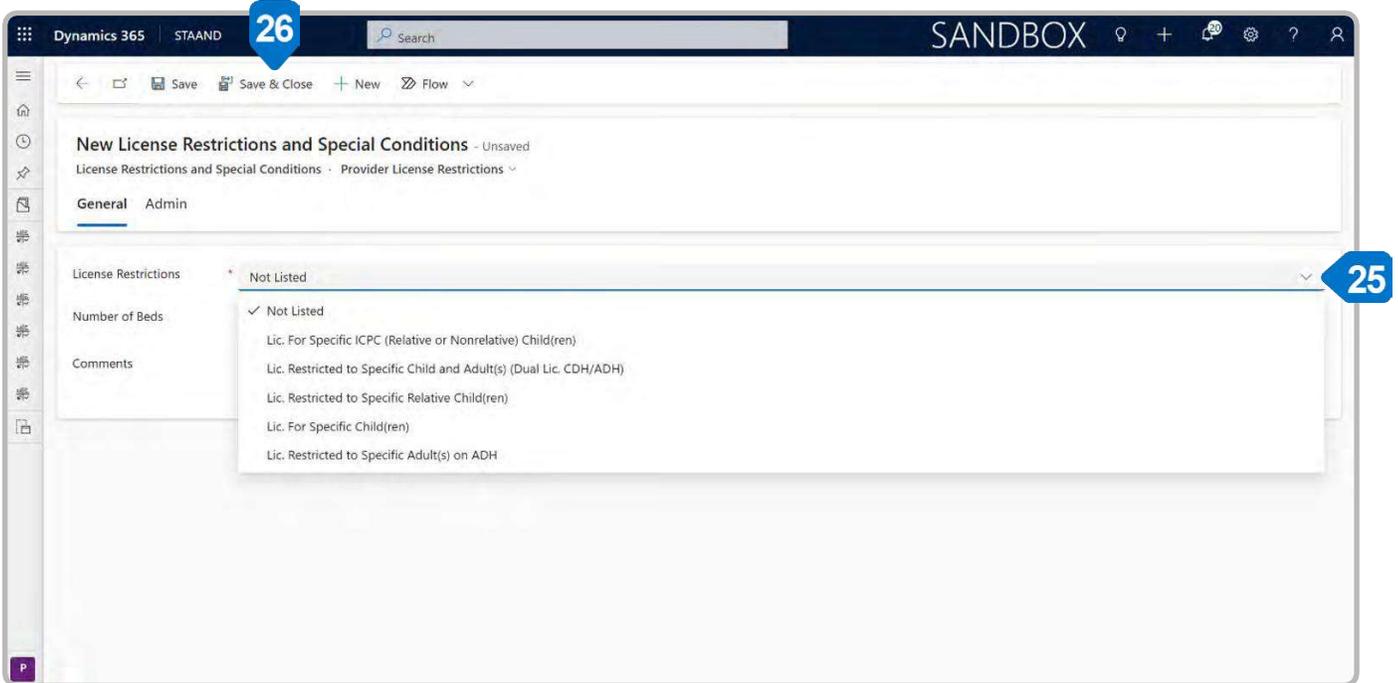
20. Select appropriate value for the Application Type field.
21. Complete all remaining fields.
22. Select Save.

The screenshot shows the 'New License' form in Dynamics 365. The 'General' tab is active. The 'Application Type' dropdown is highlighted with a blue callout box containing the number 20. The 'Agency' field is populated with 'Placement Provider'. The 'Licensee 1' and 'Licensee 2' fields are populated with 'Vanessa Ramirez' and 'Steven Morris' respectively. A blue callout box with the number 21 is positioned on the right side of the form.

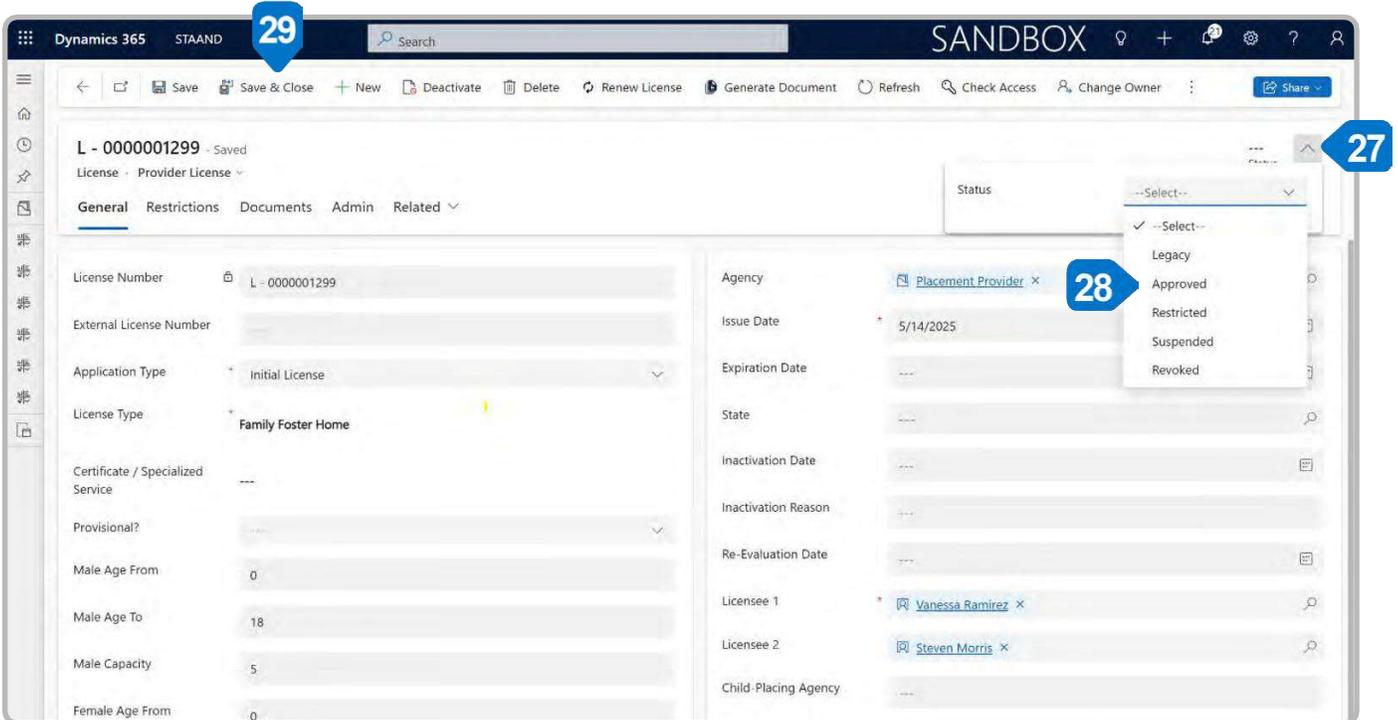
23. To add license restrictions, select the Restrictions tab.
24. Select + New License Restrictions to add any restrictions, if applicable.

The screenshot shows the 'New License' form in Dynamics 365, now in the 'Restrictions' tab. The 'License Restrictions and Special Conditions' section is visible, showing a table with columns for 'License Restrictions' and 'Number of Beds'. A blue callout box with the number 24 is positioned over the '+ New License Restriction...' button.

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

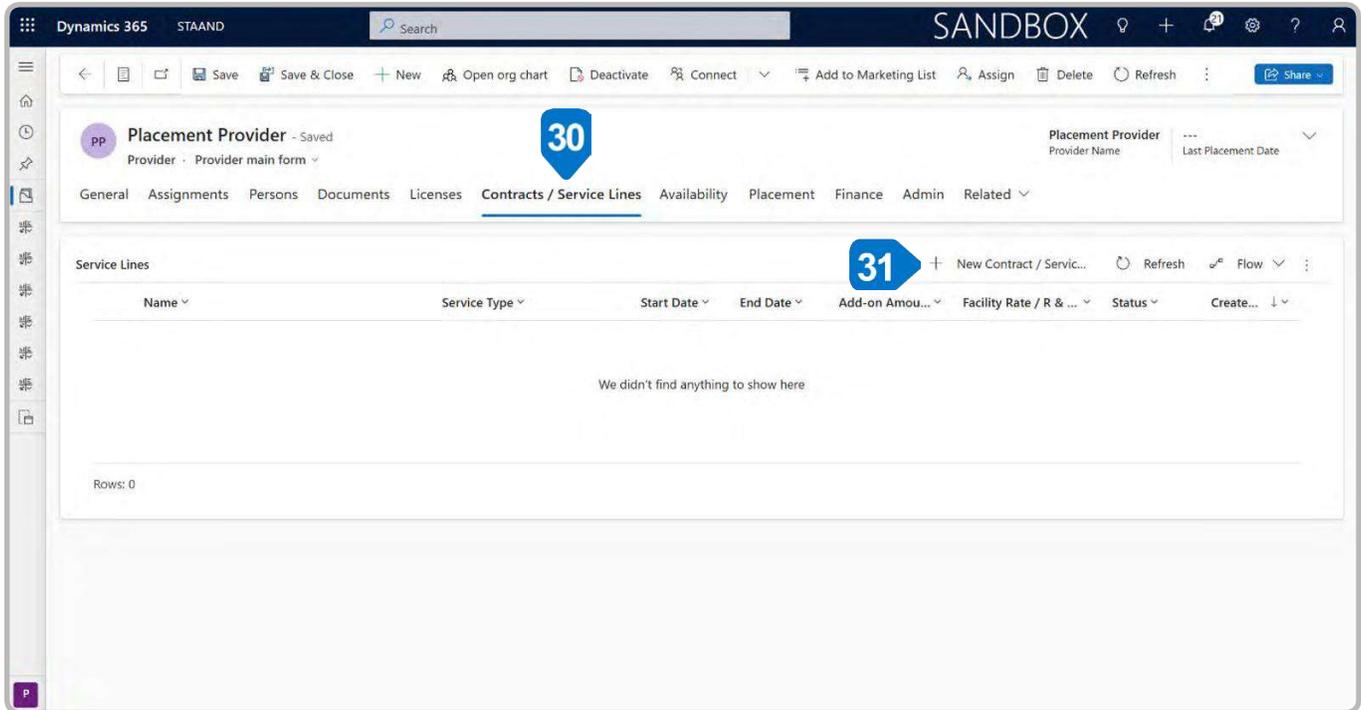


27. Select the caret to populate the status dropdown menu.
28. Select Approved from the dropdown menu in the top right corner.
29. Select Save & Close to return to the Provider record.



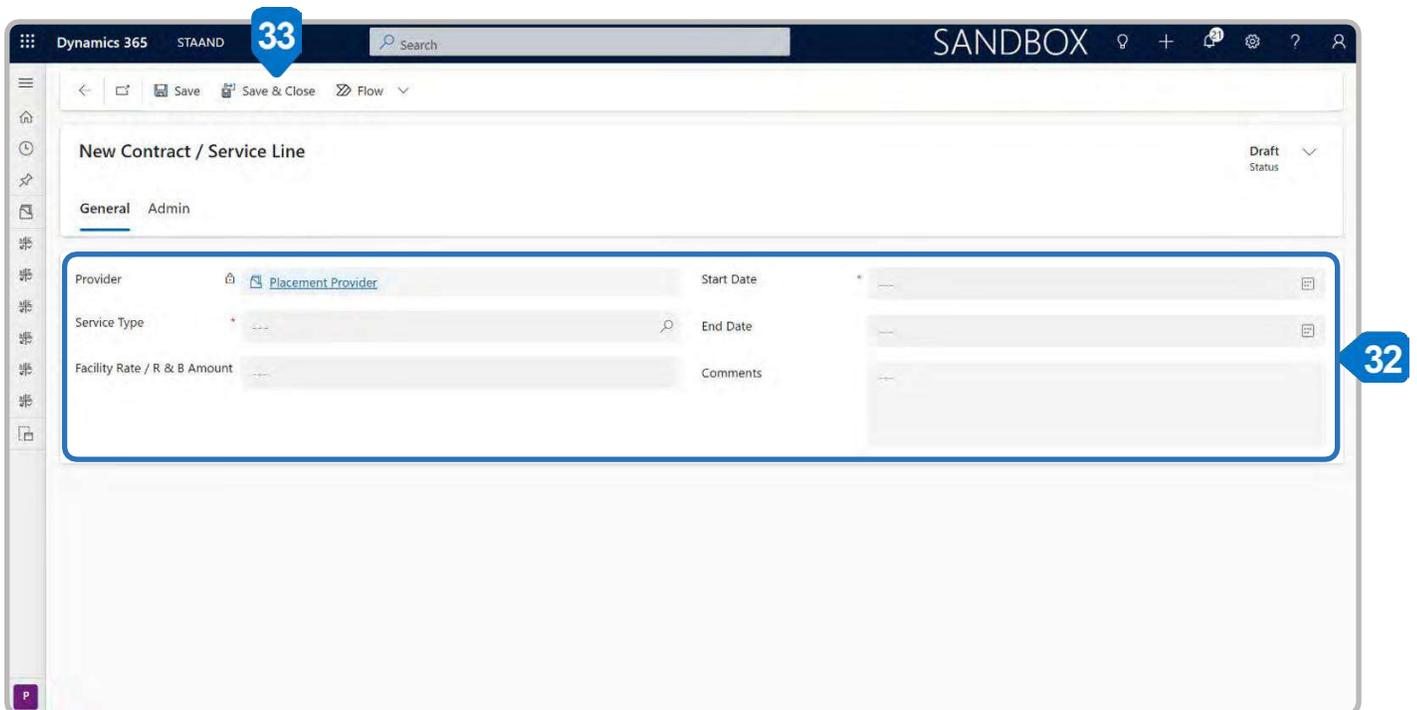
30. To add **Contracts/Services information**, select the **Contracts/Service Lines** tab.

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



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

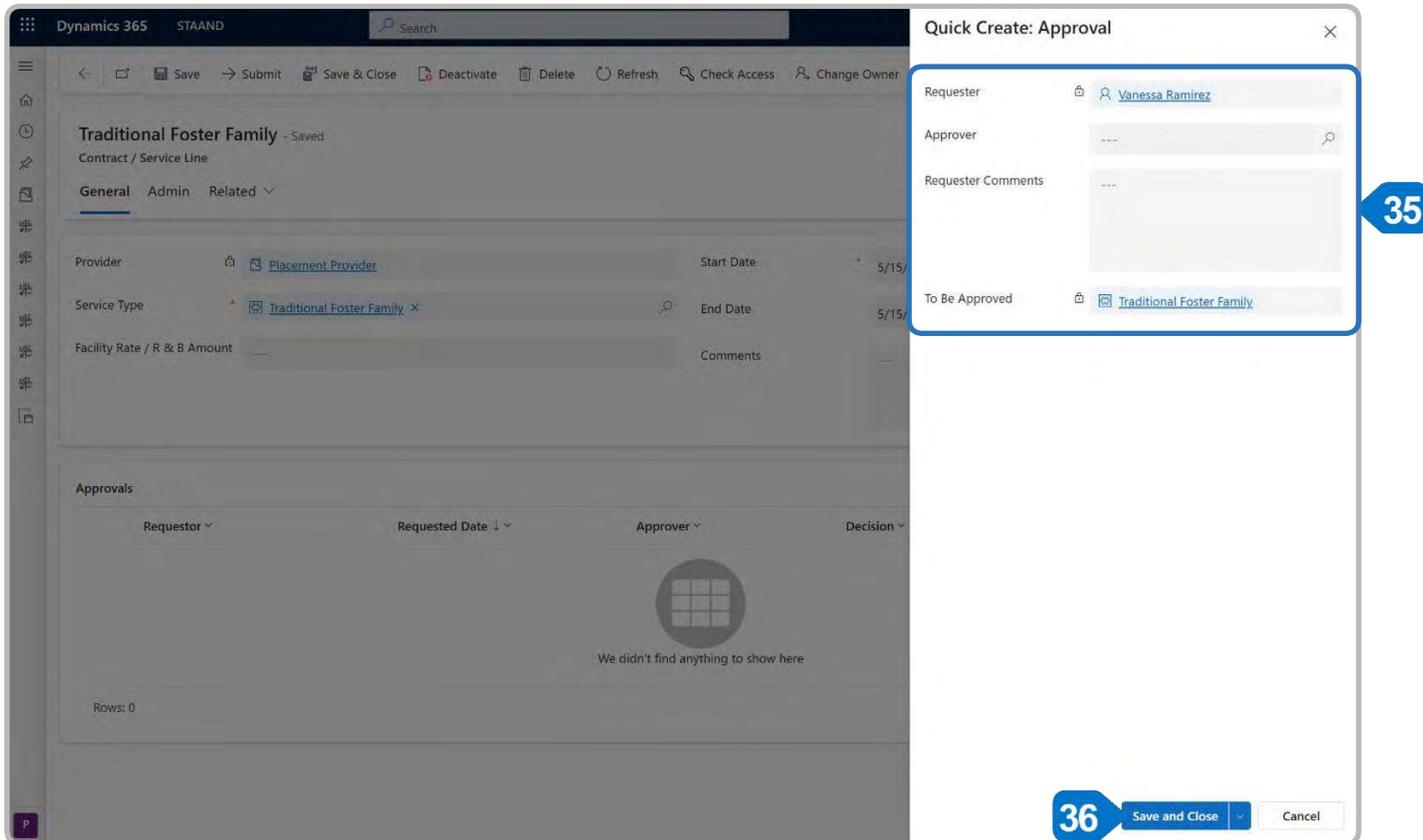
33. Select **Save & Close**.



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 form is an "Approvals" table with 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" and "Rows: 0". The top navigation bar shows "Dynamics 365 STAAND" and "SANDBOX". A blue shield icon with the number "34" is overlaid on the top left of the interface.

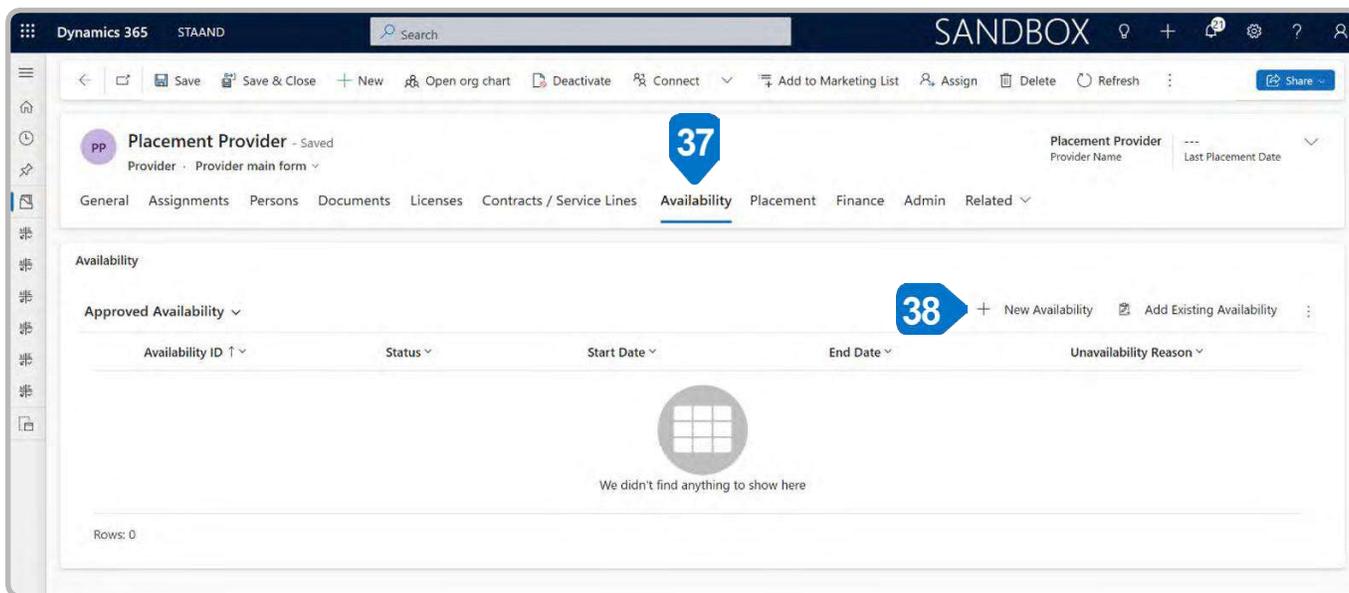
35. Complete all fields within the Quick Create: Approval window.
36. Select Save and Close.



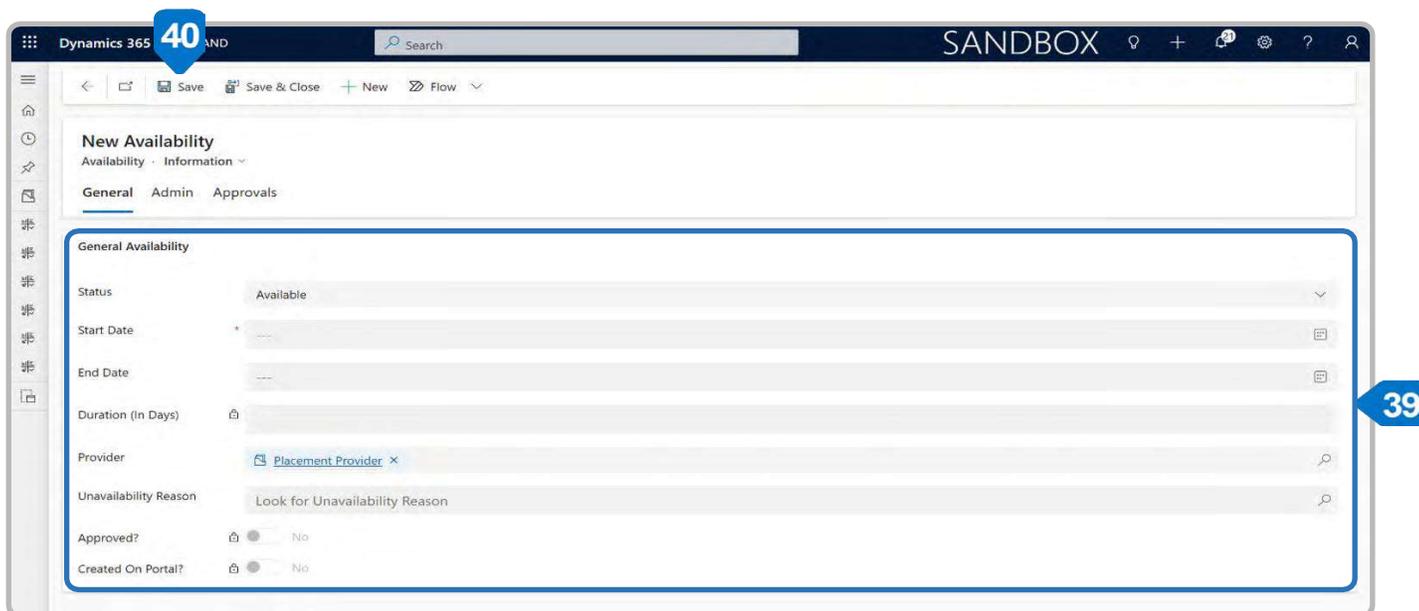
Note:

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.



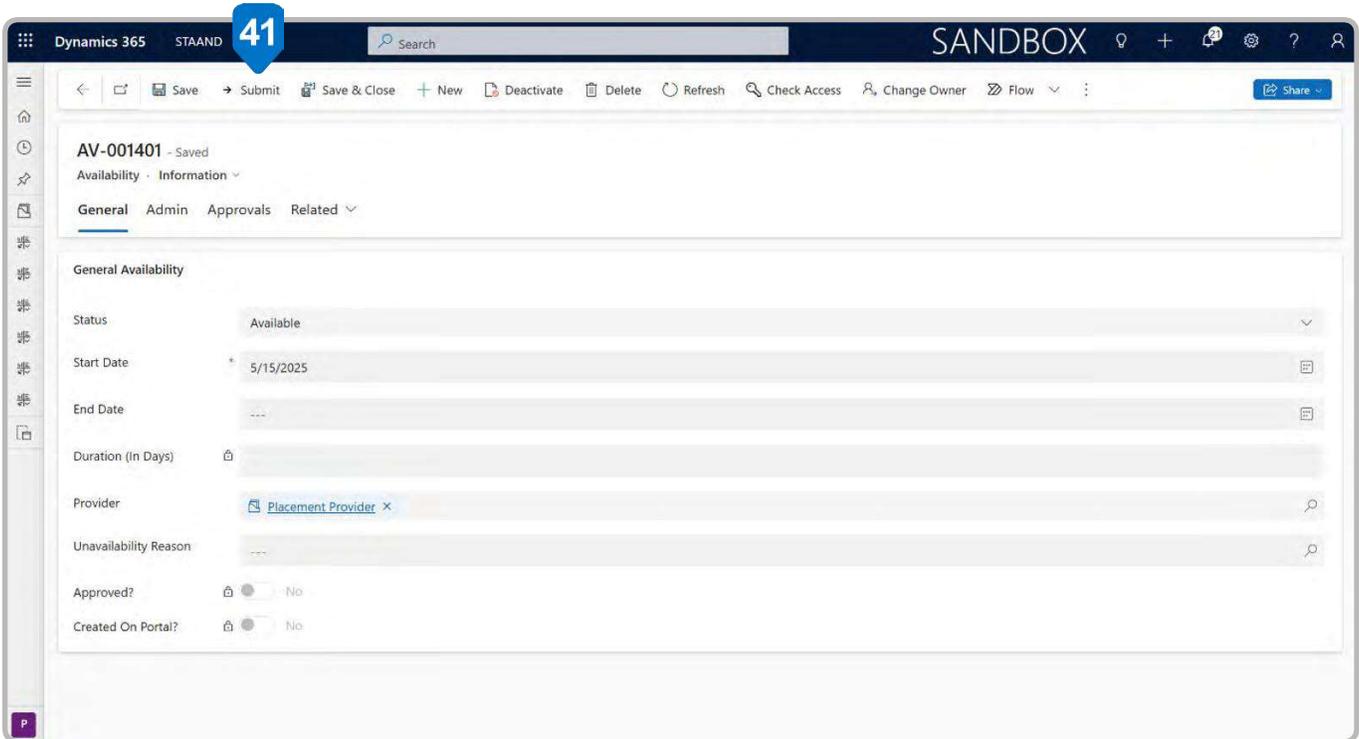
39. Complete all fields including Status and Start Date.
40. Select Save.



Note:

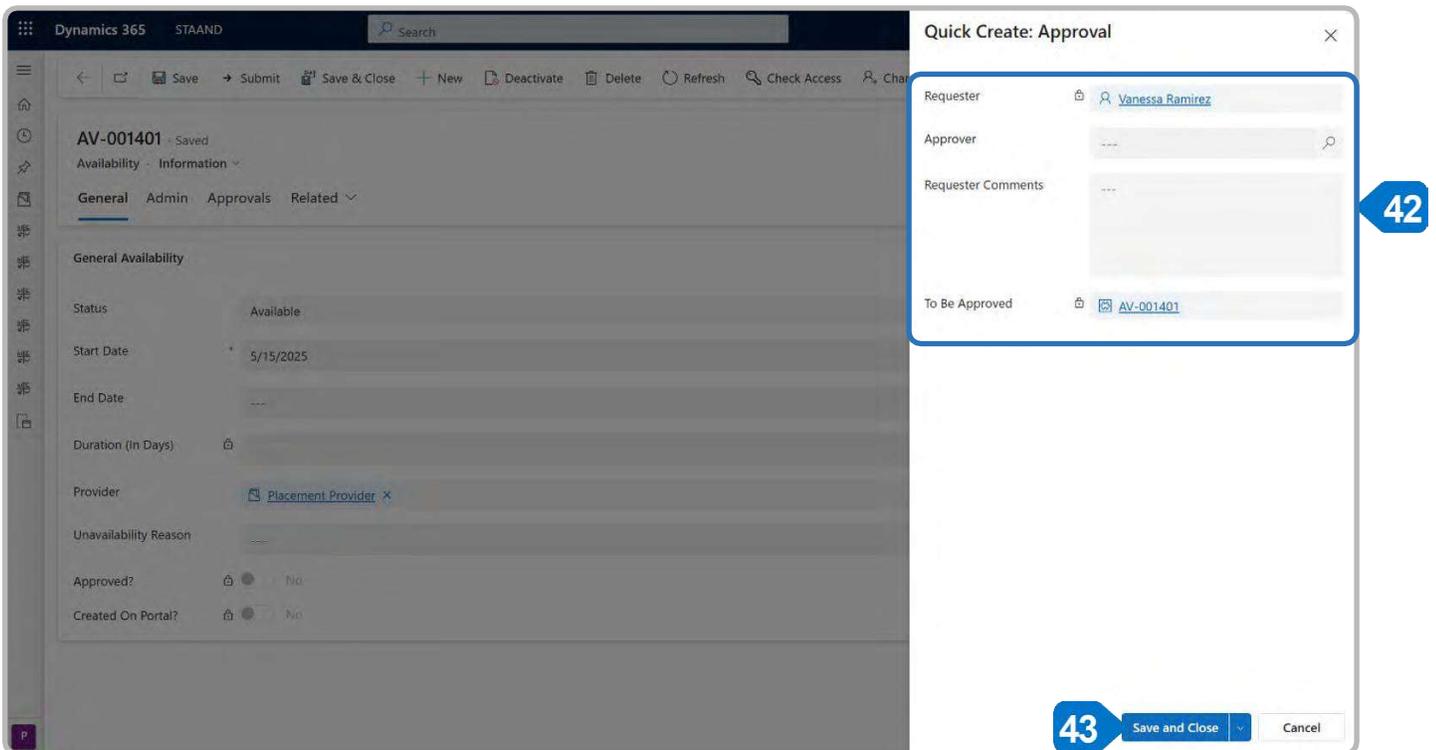
If an End Date is selected, the User will then need to select an Unavailability Reason from the dropdown menu.

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.

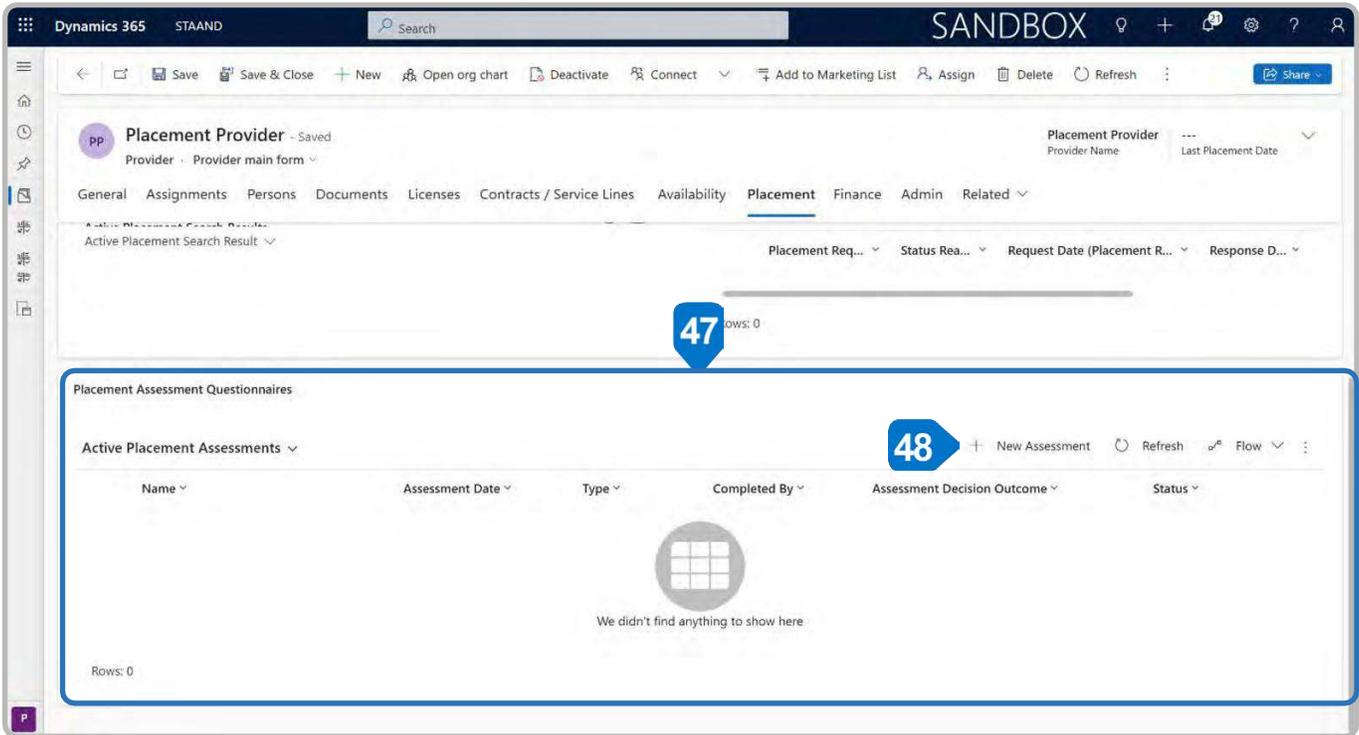
44. Select the Approvals tab.
45. Once the Provider availability is approved, it will populate in the approvals subgrid.
46. Select Save & Close.

The screenshot shows the Dynamics 365 interface for an Availability record (AV-001401). The 'Approvals' tab is selected, displaying a subgrid with the following data:

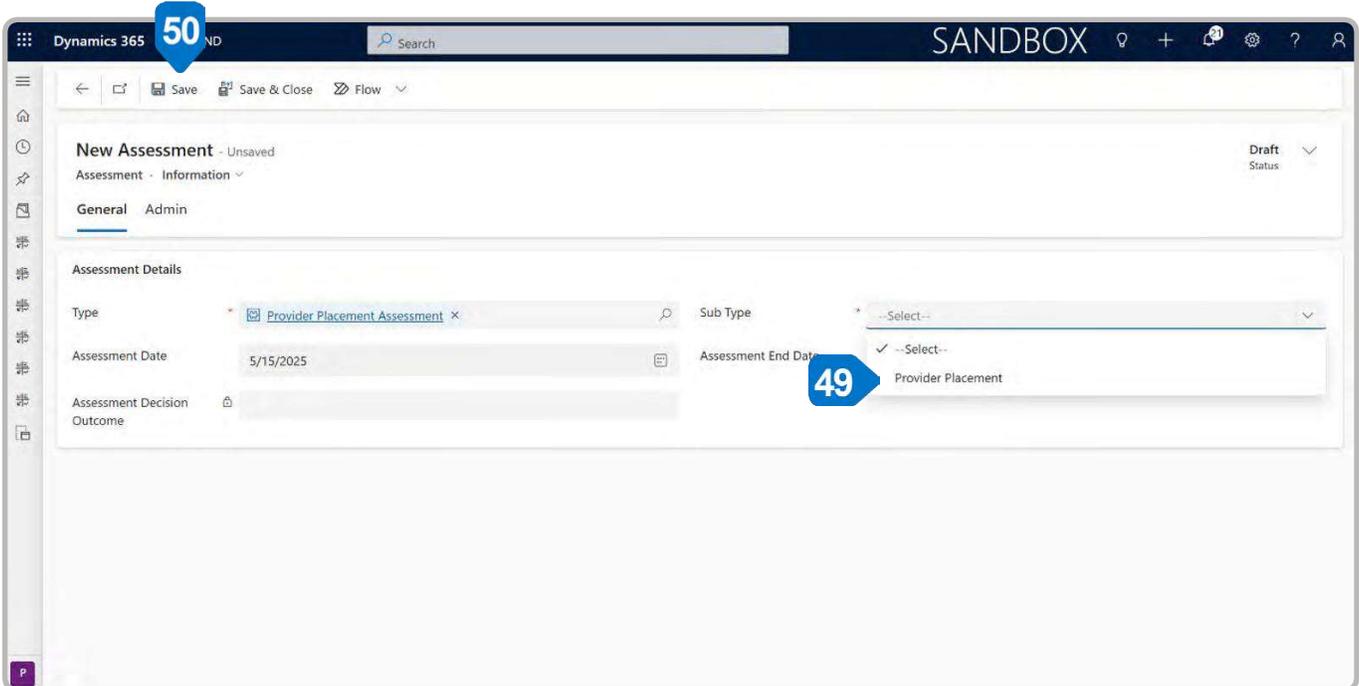
Requestor	Requested Date	Approver	Decision	Decision Date
Vanessa Ramirez	5/15/2025 11:18 AM	Vanessa Ramirez	Approved	5/15/2025 4:19 PM

Annotations: A blue callout '44' points to the 'Approvals' tab, and another blue callout '45' points to the 'Approver' column in the subgrid. The top of the interface shows 'Dynamics 365 STAAND' and 'SANDBOX'.

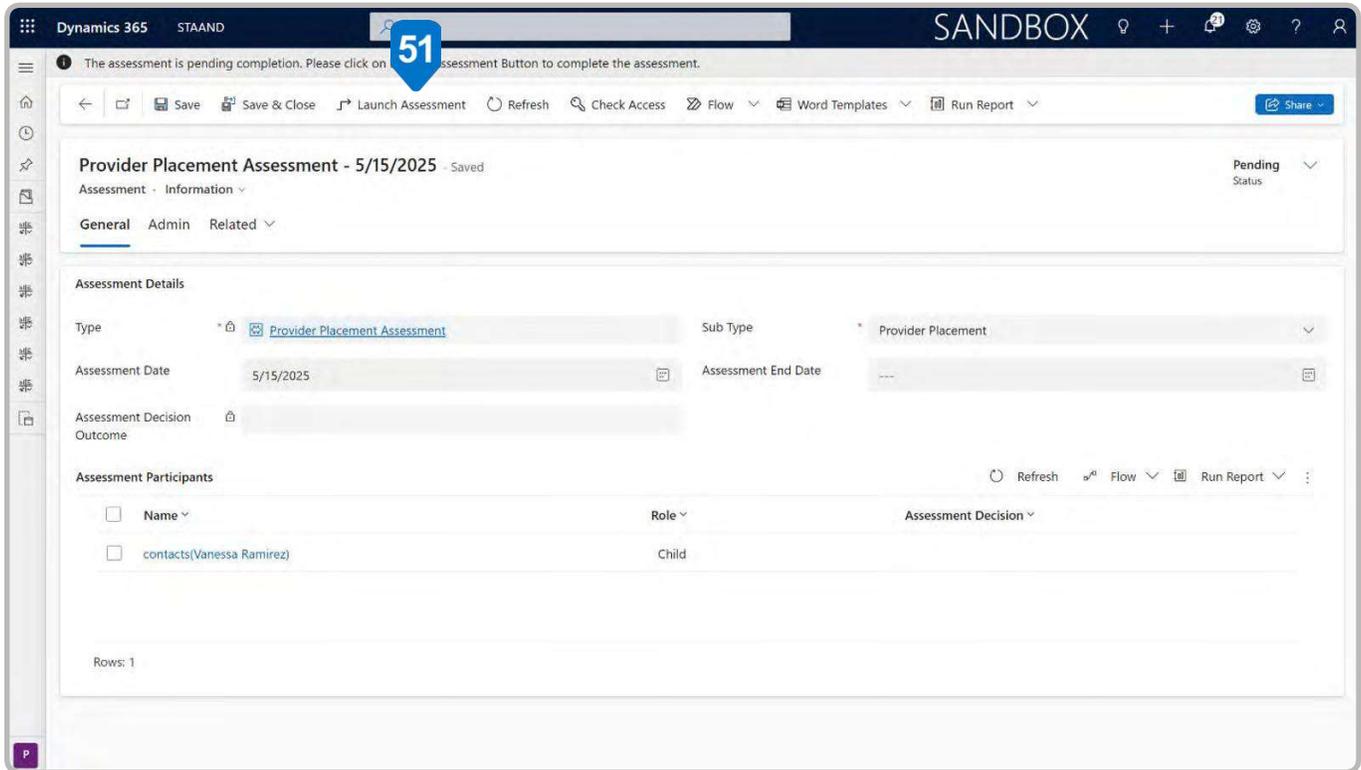
47. To add a new **Provider Questionnaire** that is used to match placement providers with children in need of a placement, from the Provider record, navigate to the Placement Assessment Questionnaires subgrid within the Placement tab.
48. Select + New Assessment.



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

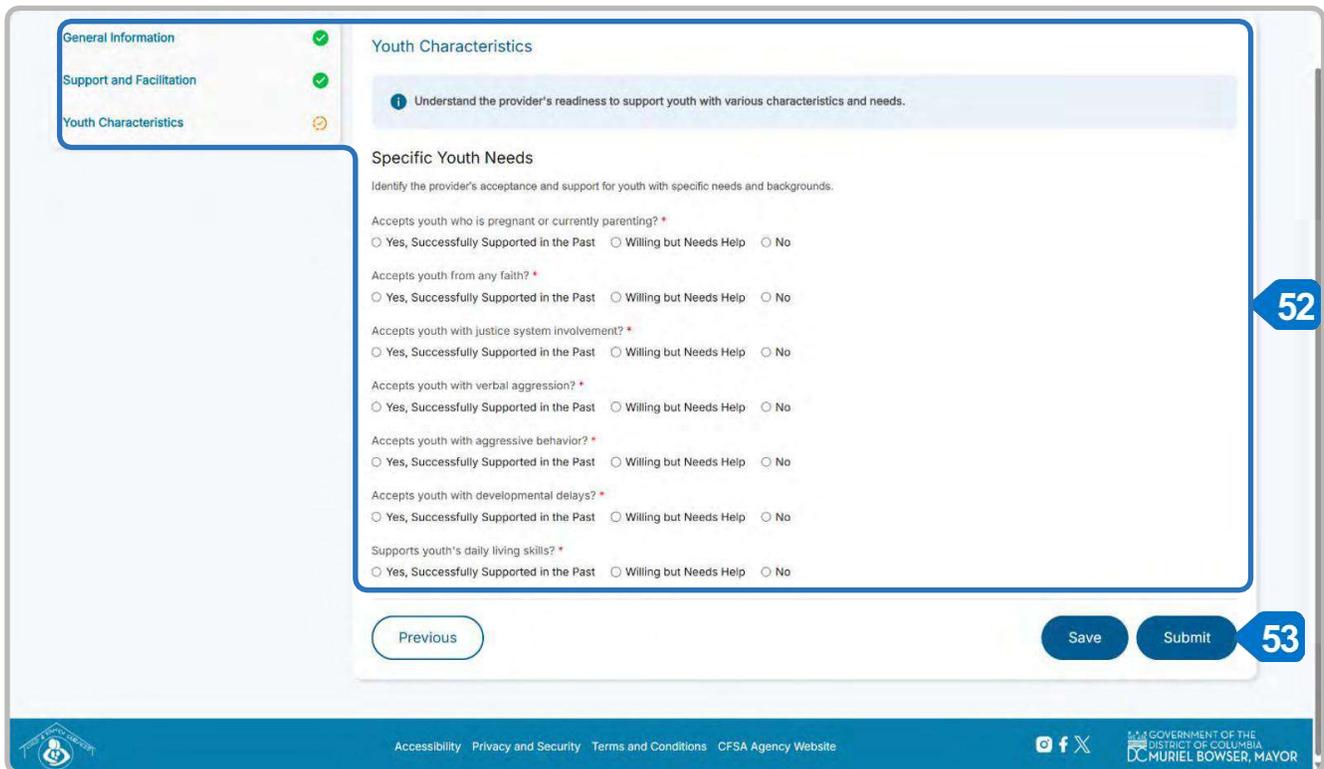


- Select Launch Assessment. Note: if the Launch Assessment button does not show immediately, save or refresh the page.

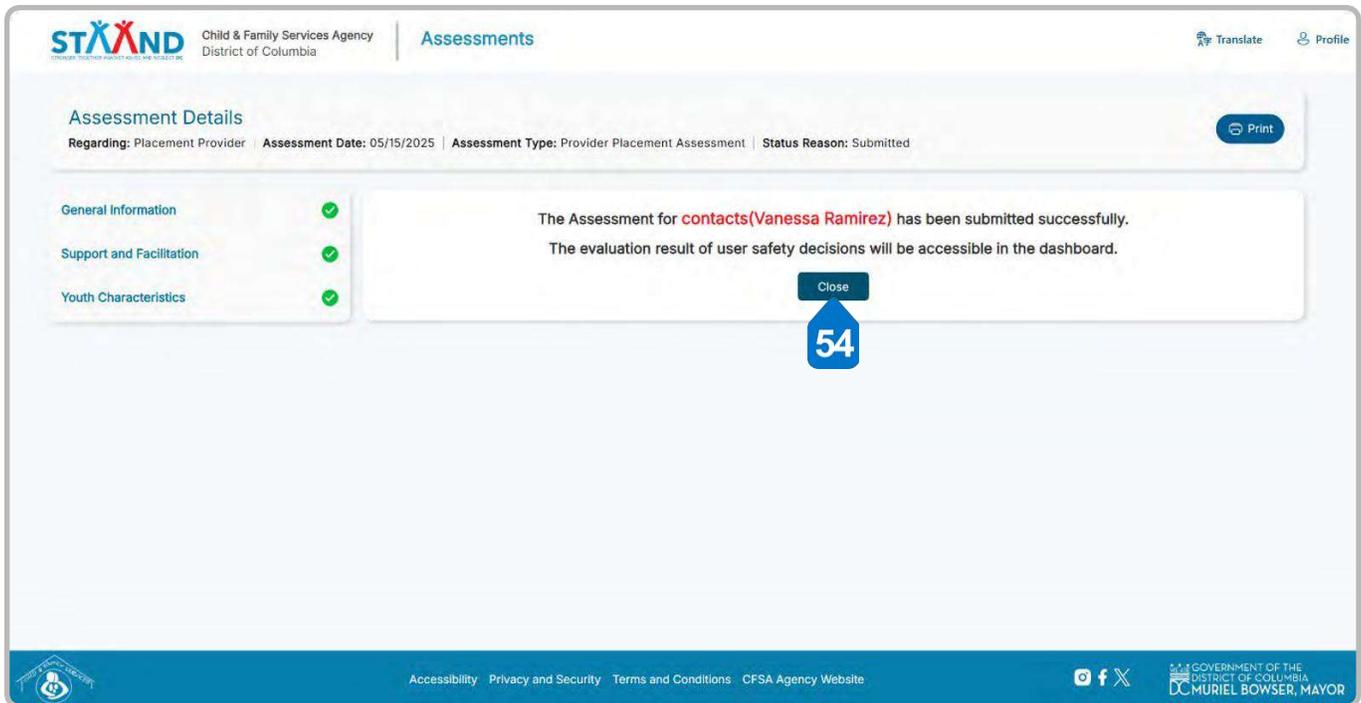


- Answer all questions within the questionnaire.

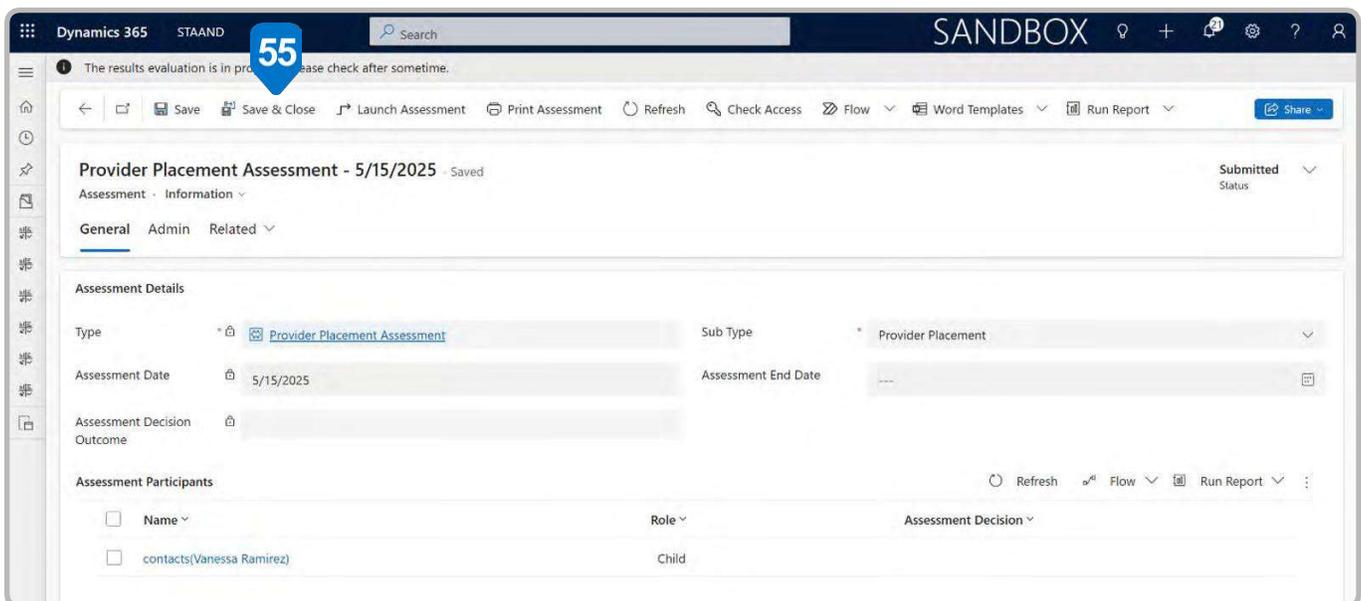
- Once completed select Submit.



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

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									

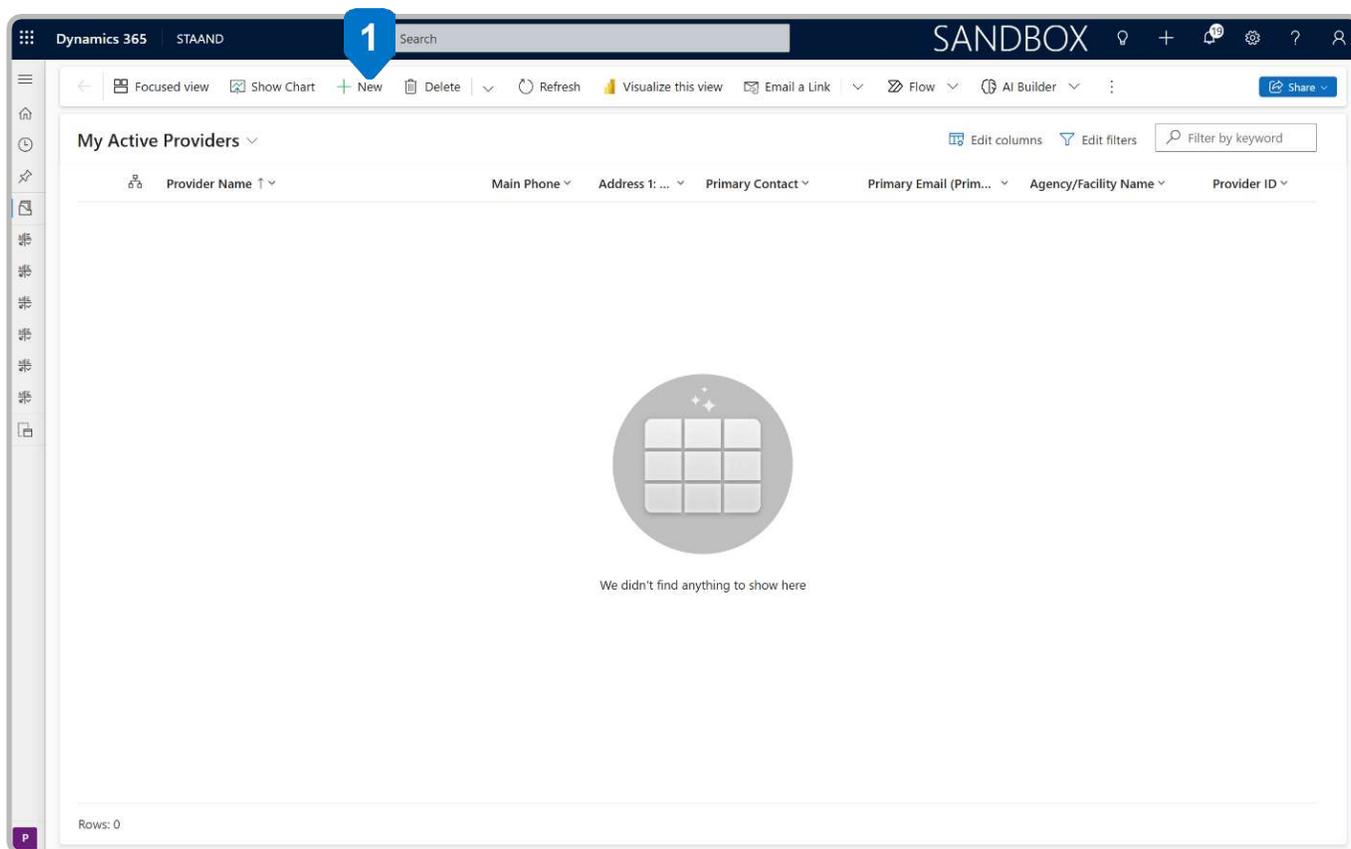
Invoices + New Invoice Refresh Flow

Invoice Nu...	Agency/Prov...	Service Type	Invoice Amo...	Invoice Approved Am...	Invoice Paid Amo...	Invoice Submitt...	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.



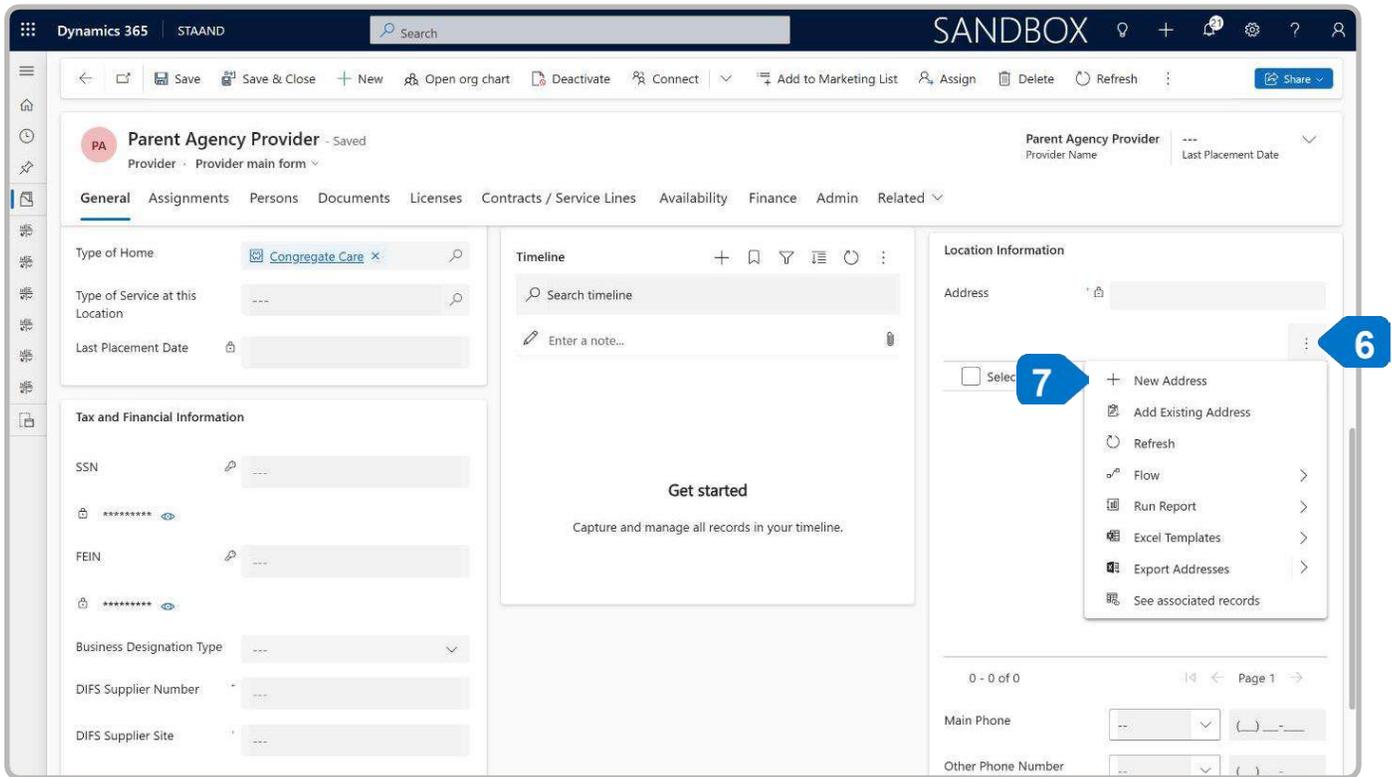
2. Complete all fields including, Provider Category, and Provider Class.
3. Select Yes in the “Is Agency” field.
4. Enter a Primary Contact, within the Contact Information subgrid.
5. Select Save.

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', and 'Location 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 'Provider Information' section includes fields for Provider Name, Provider ID, Provider Type (set to CFSA), Provider Category, 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 includes fields for Available (set to No), Provider Status, Unavailability Reason, Provider Capacity, Last updated: (set to Not Available), Children in Placement, and Current Availability. The 'Contact Information' section includes fields for Primary Contact, Secondary Contact, Address, Main Phone, Other Phone Number, Email, Extension, and Distance. The 'Location Information' section includes fields for Address, Main Phone, Other Phone Number, Email, Extension, and Distance. The bottom of the form shows 'Tax and Financial Information' and a 'Timeline' section with the text 'Almost there' and 'Select Save to see your timeline.'

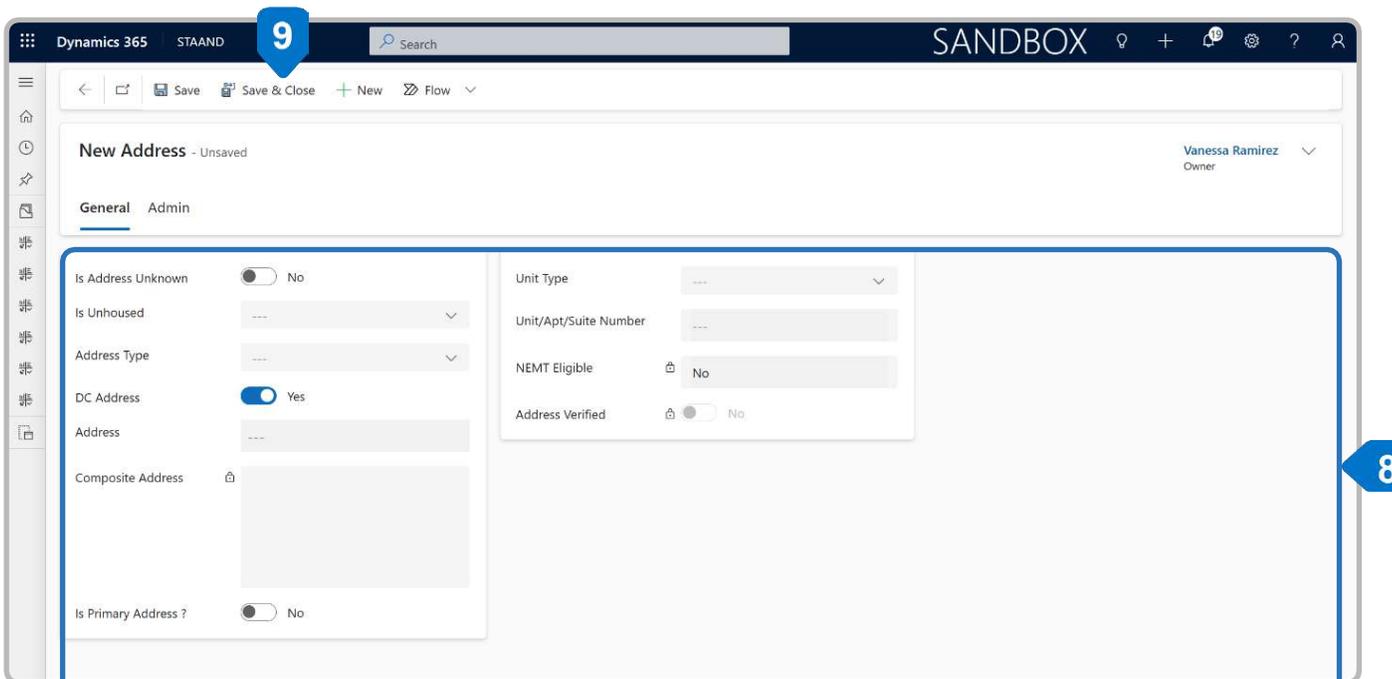
Note:

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

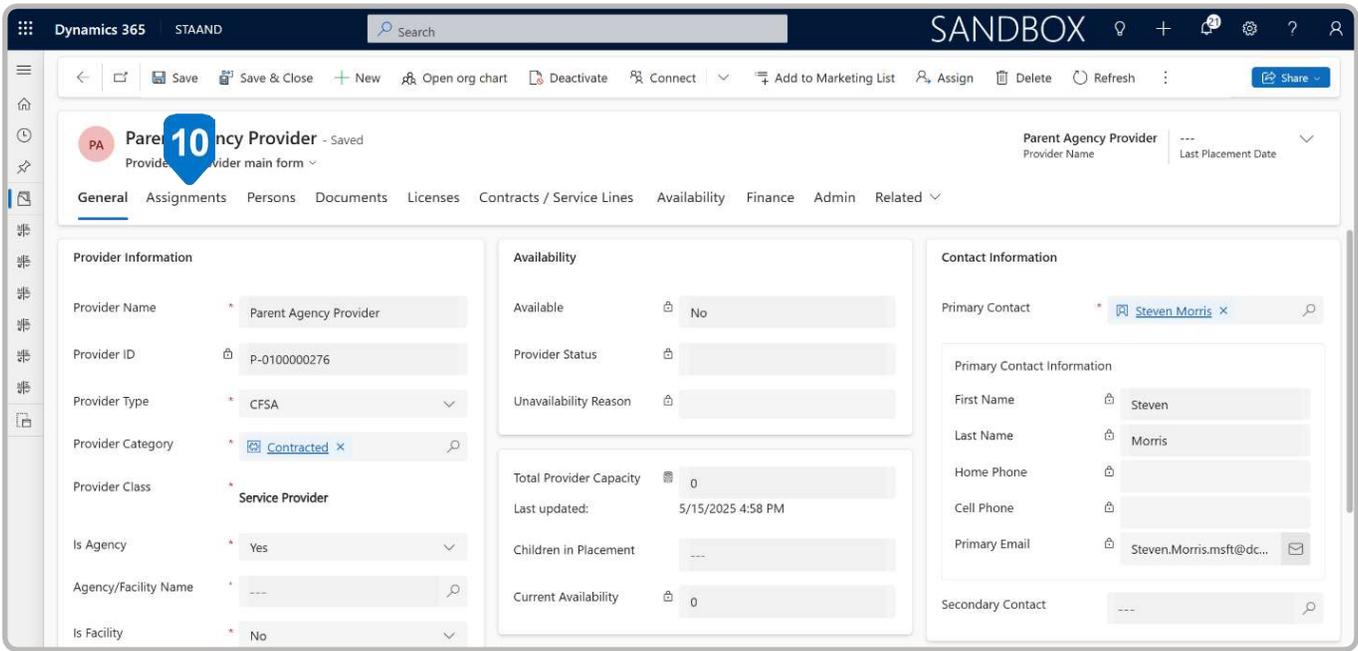
- From the Location Information sub-grid, select the more commands icon.
- Select + New Address.



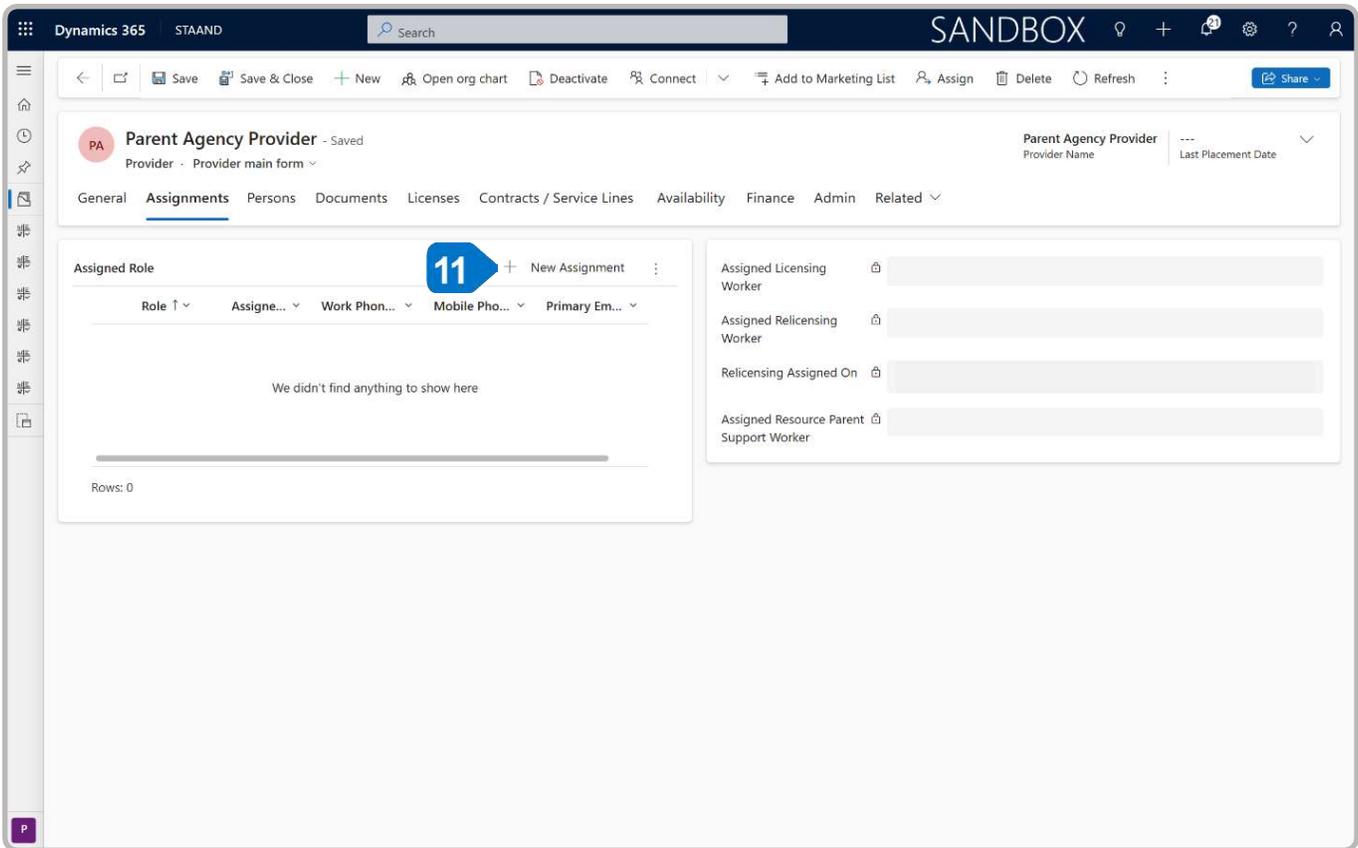
- Complete all fields.
- Select Save & Close.



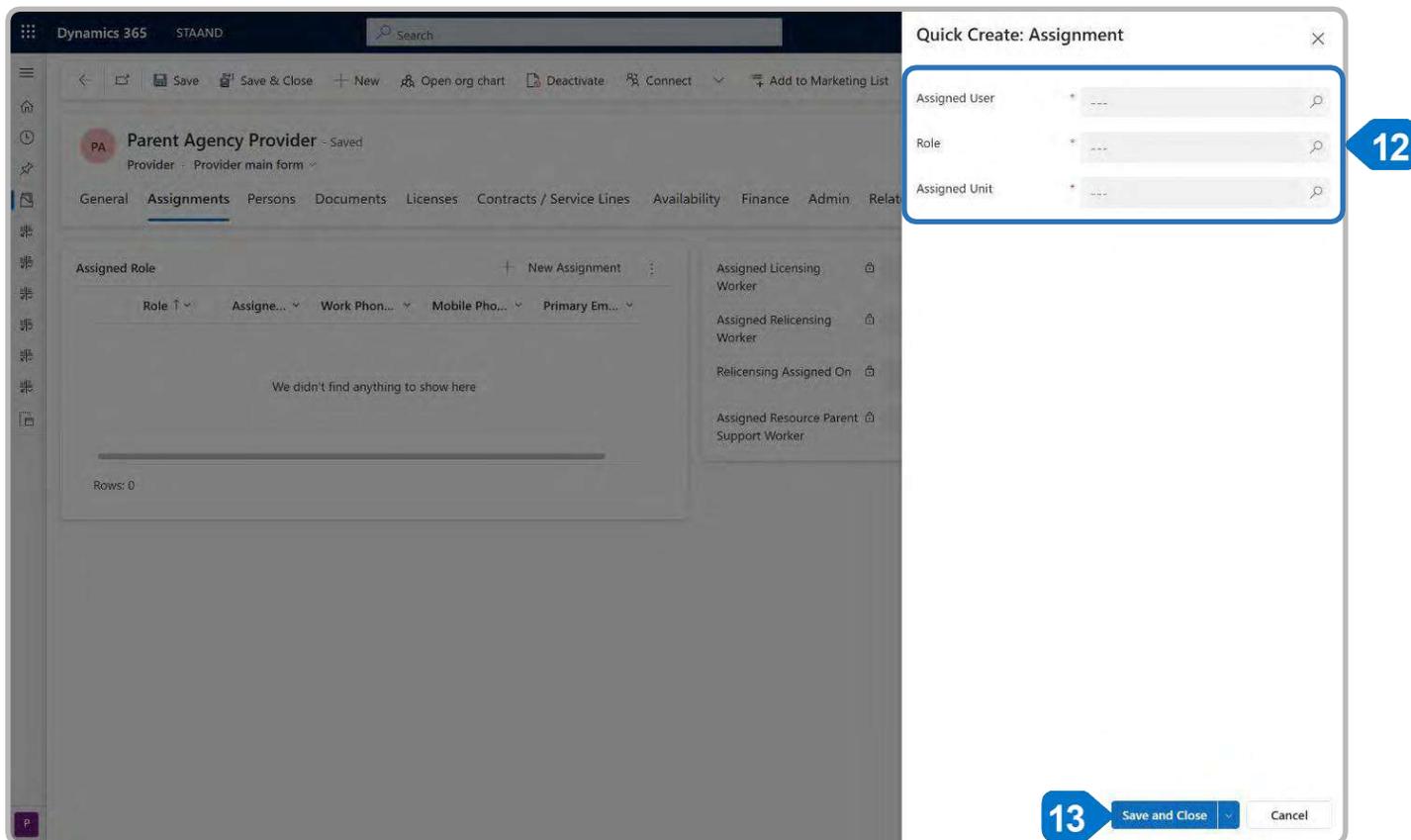
10. To assign the Provider record, select the Assignments tab.



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.

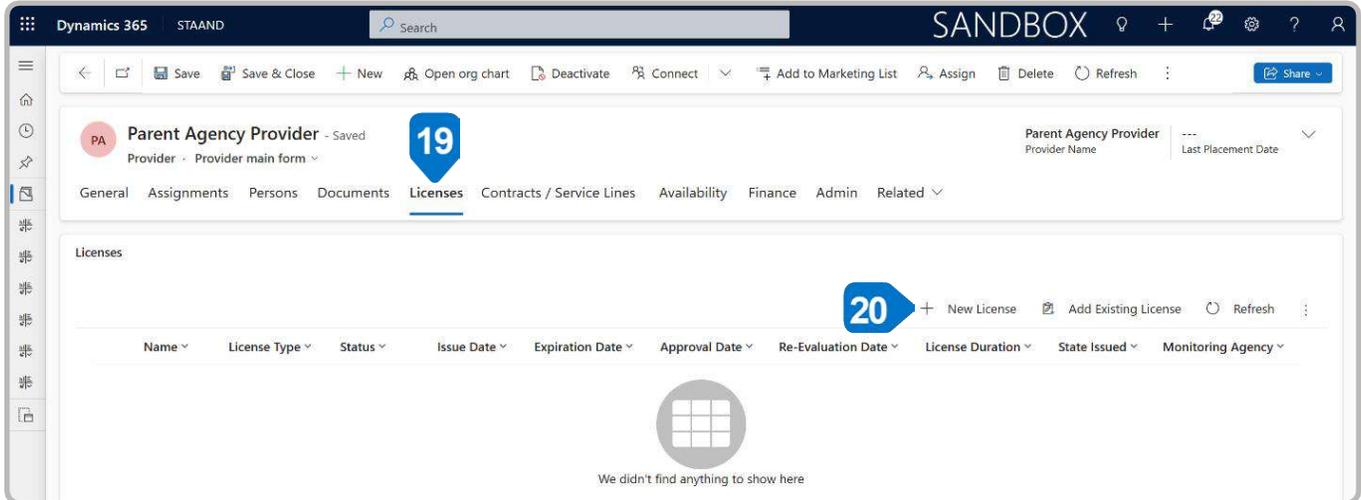


Important Tip:

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

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

15. Select +New License.

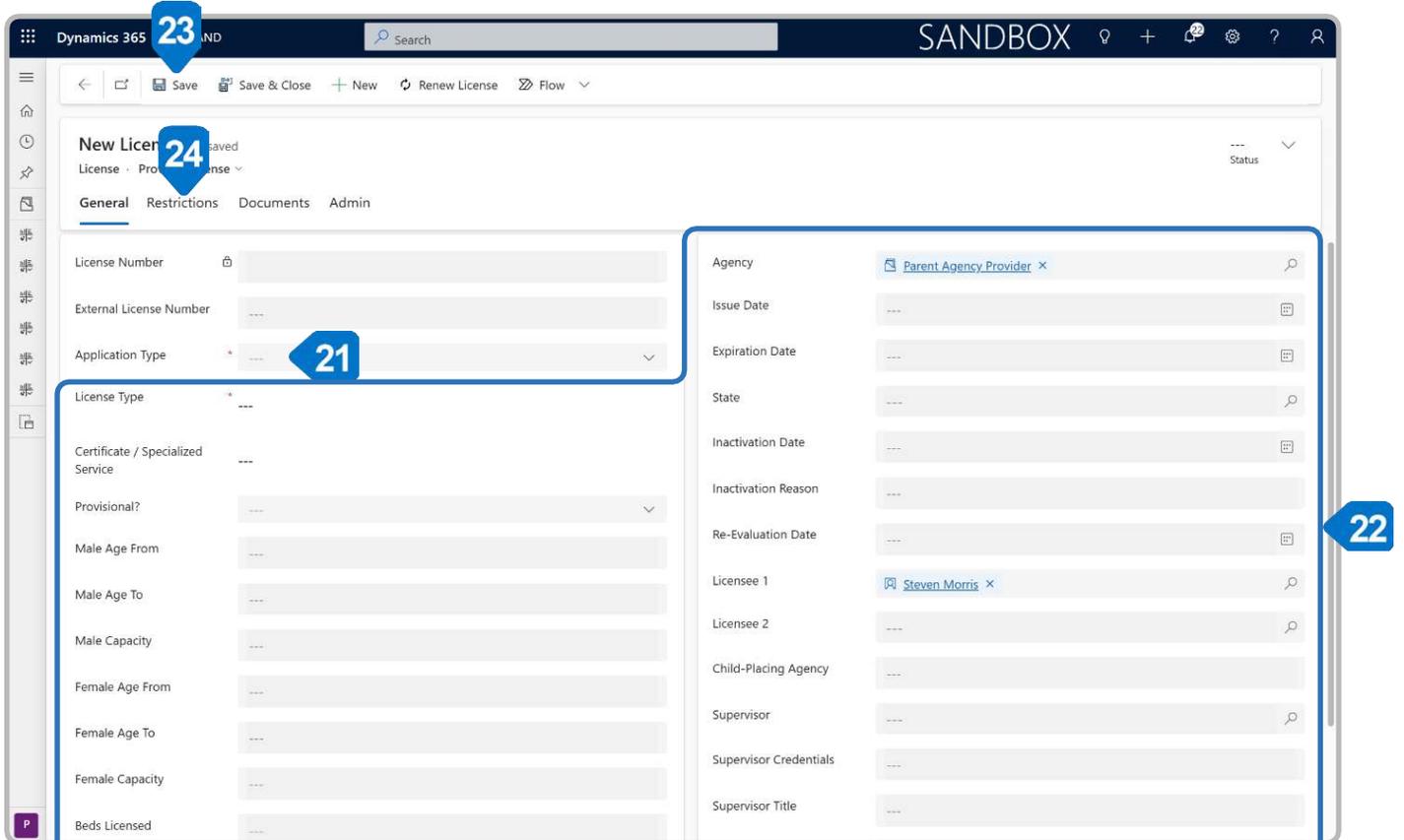


16. Select fields as applicable.

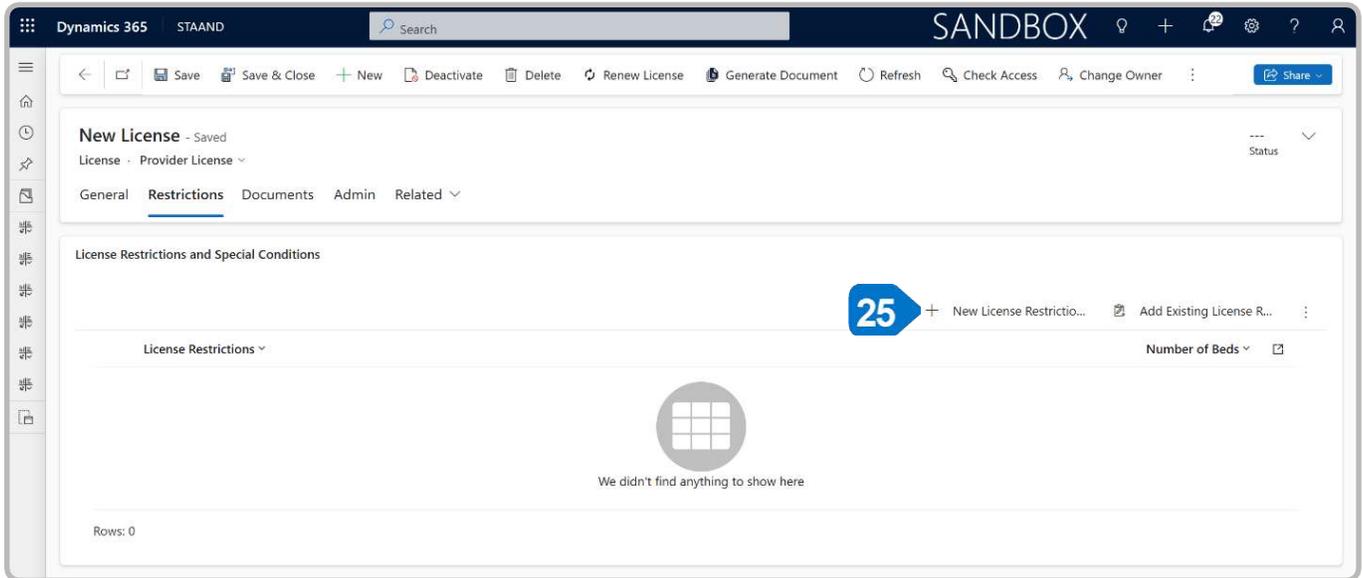
17. Complete all fields.

18. Select Save.

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

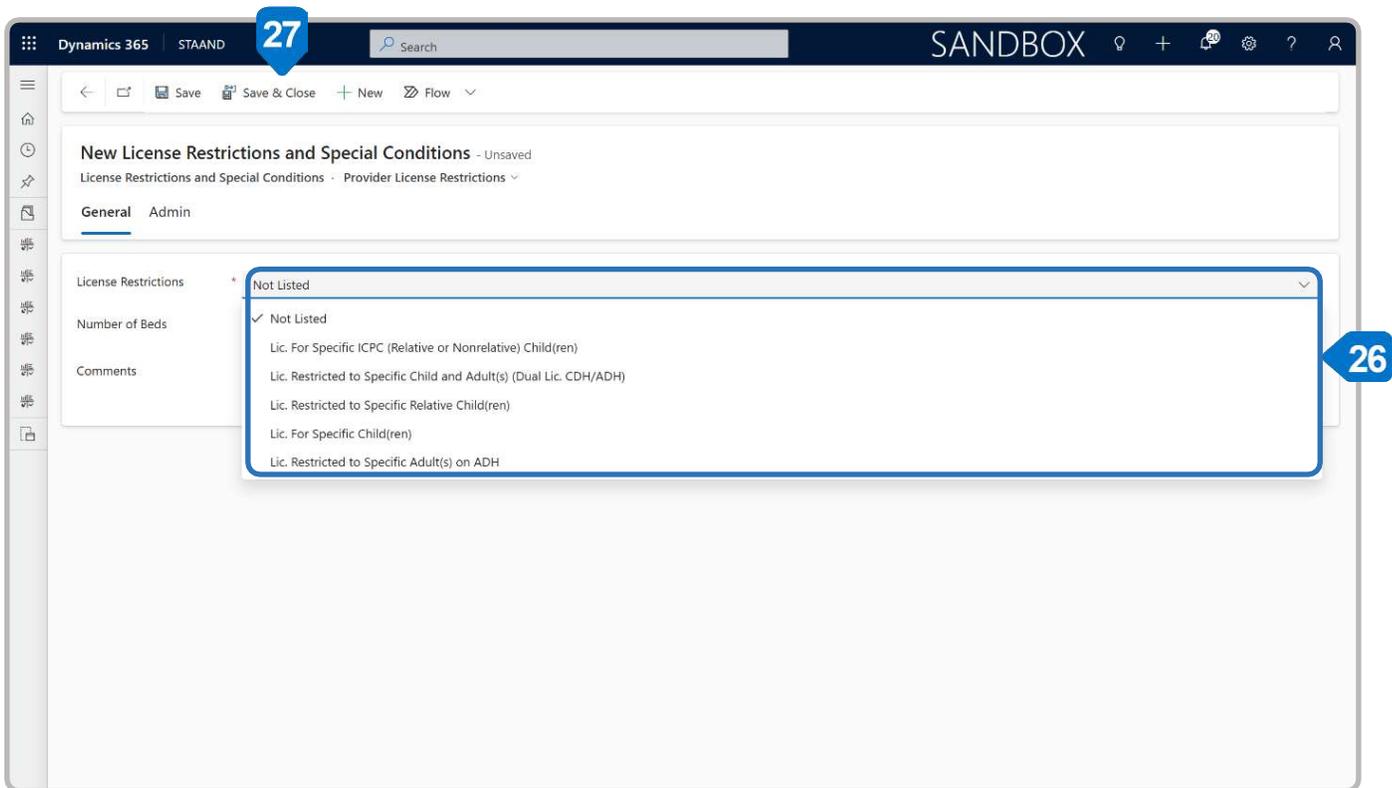


20. Select + New License Restrictions:

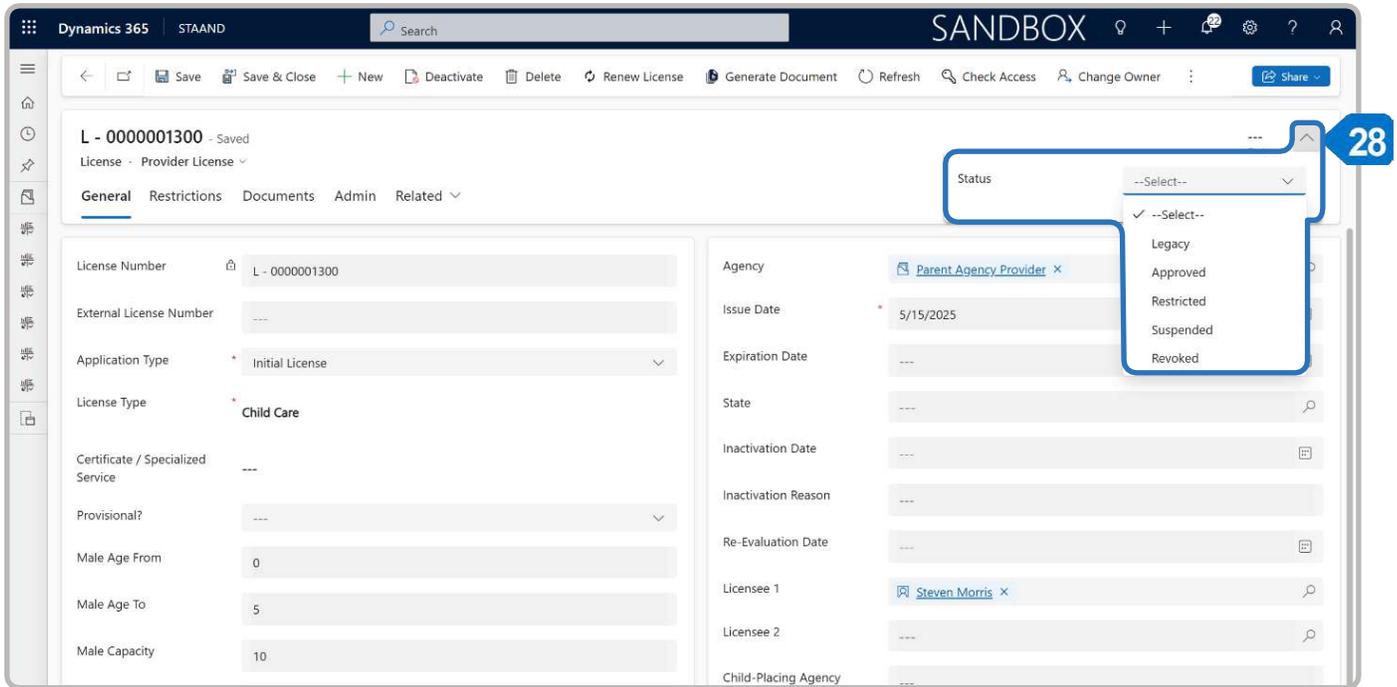


21. Select the License Restrictions from the dropdown menu and complete all necessary information.

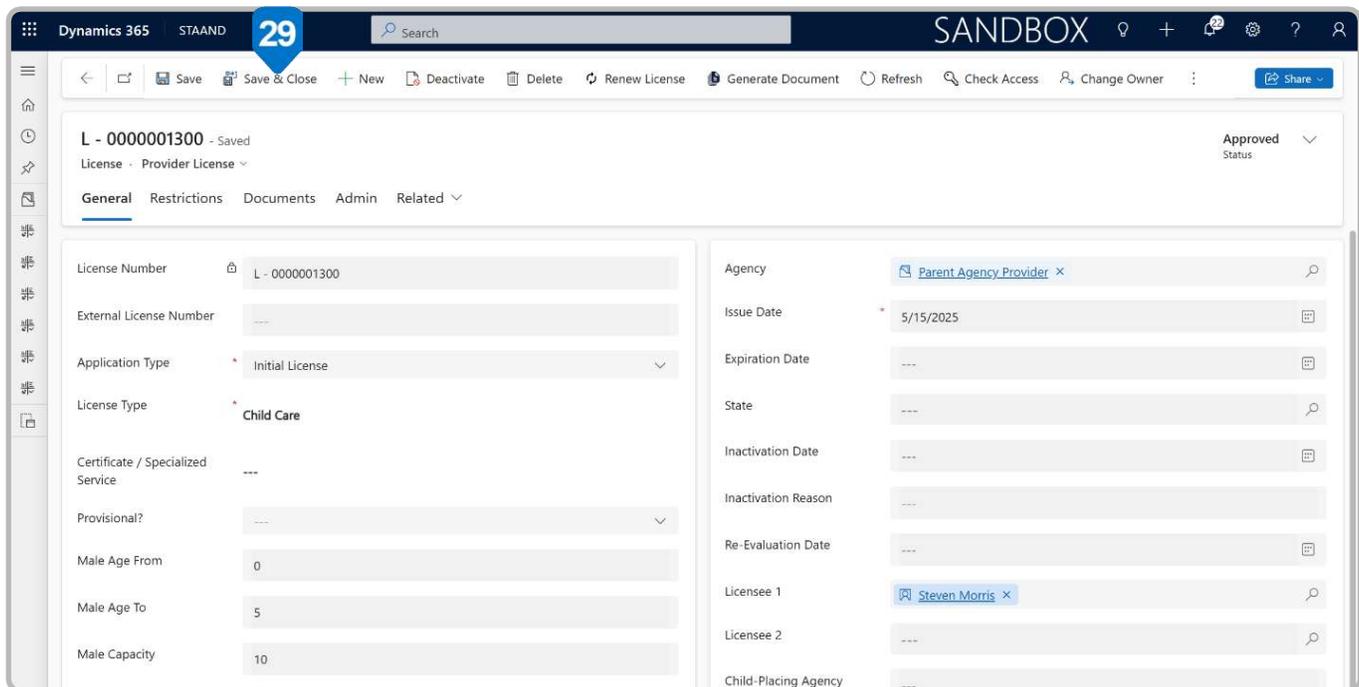
22. Select Save & Close.



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

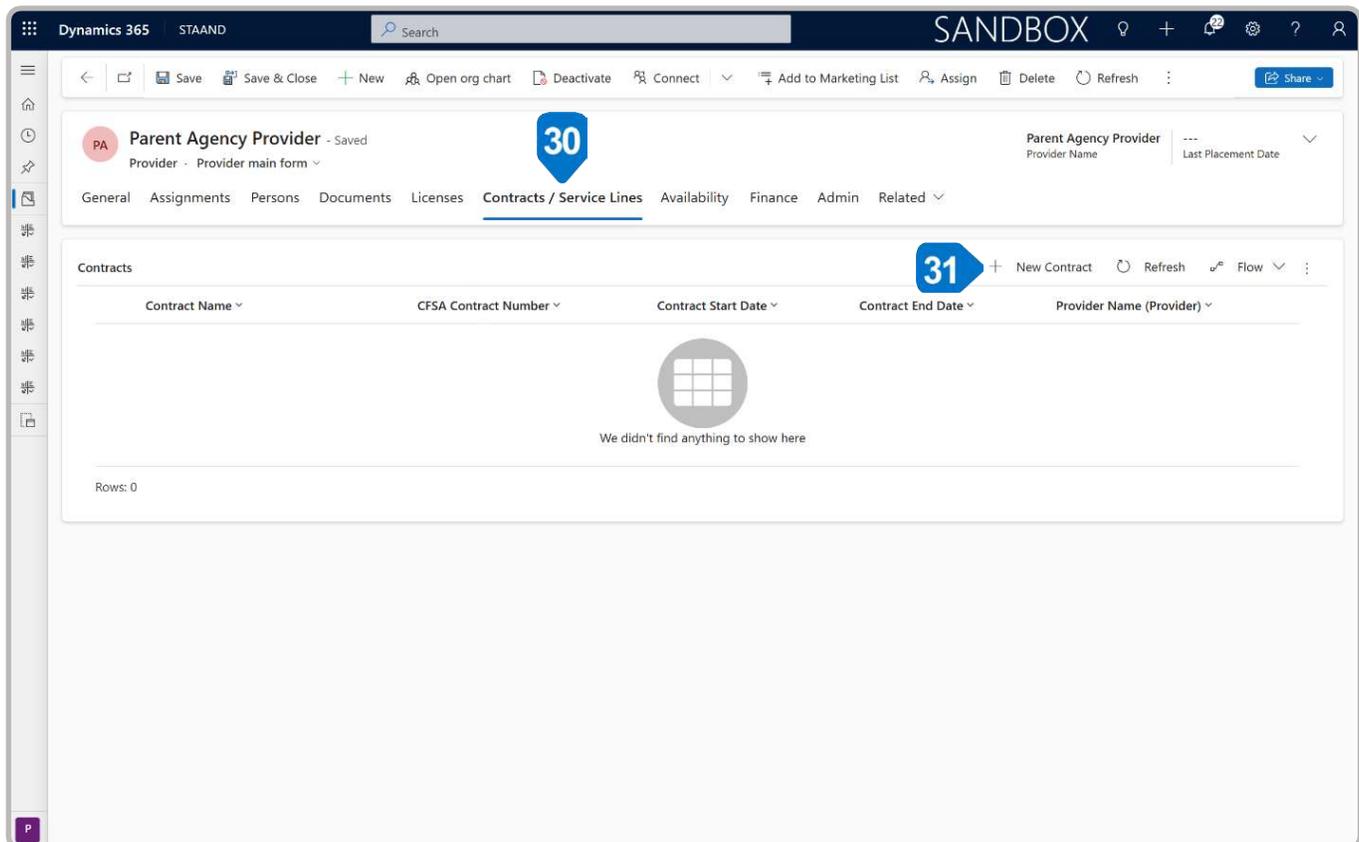


24. Select Save & Close to return to the Provider record.

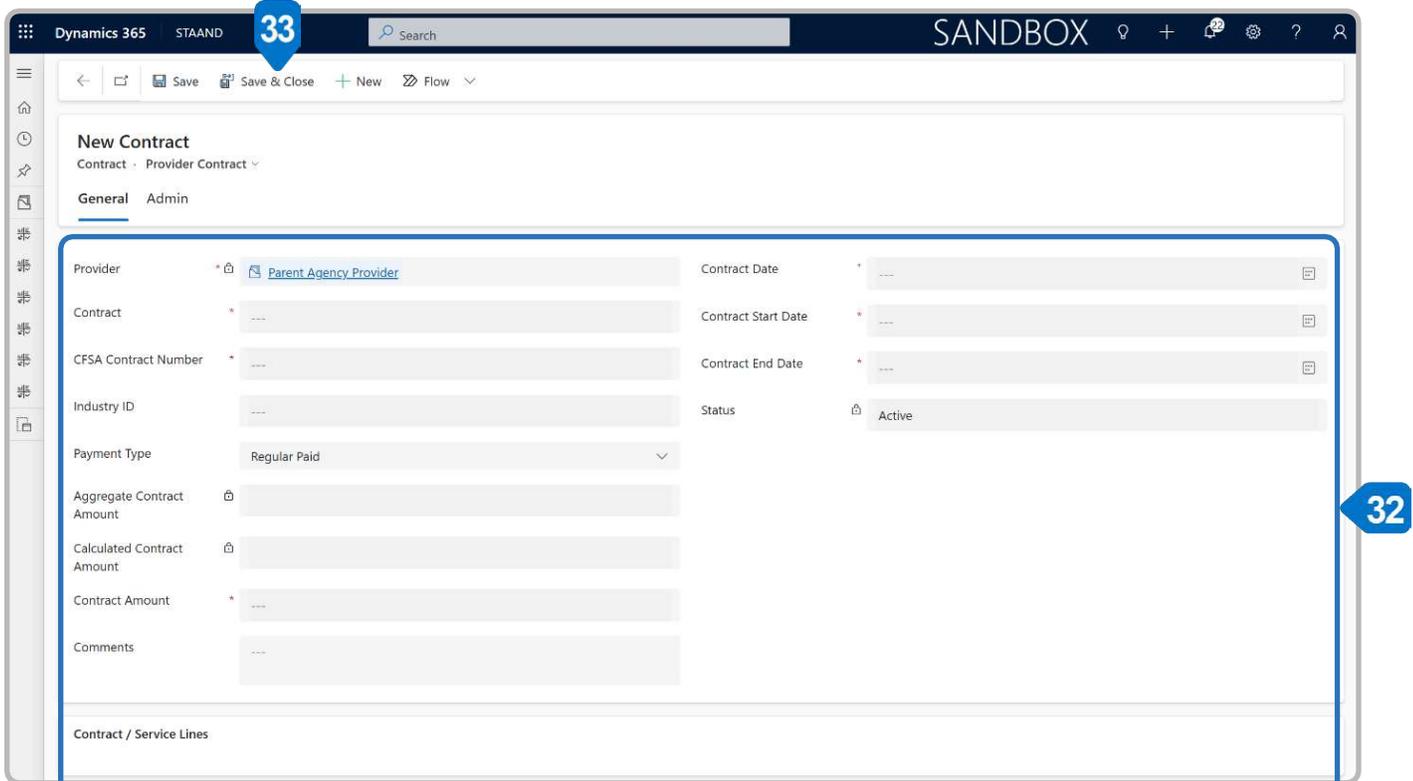


25. To add a Contract to an Agency Provider, select the Contracts/Service Lines tab.

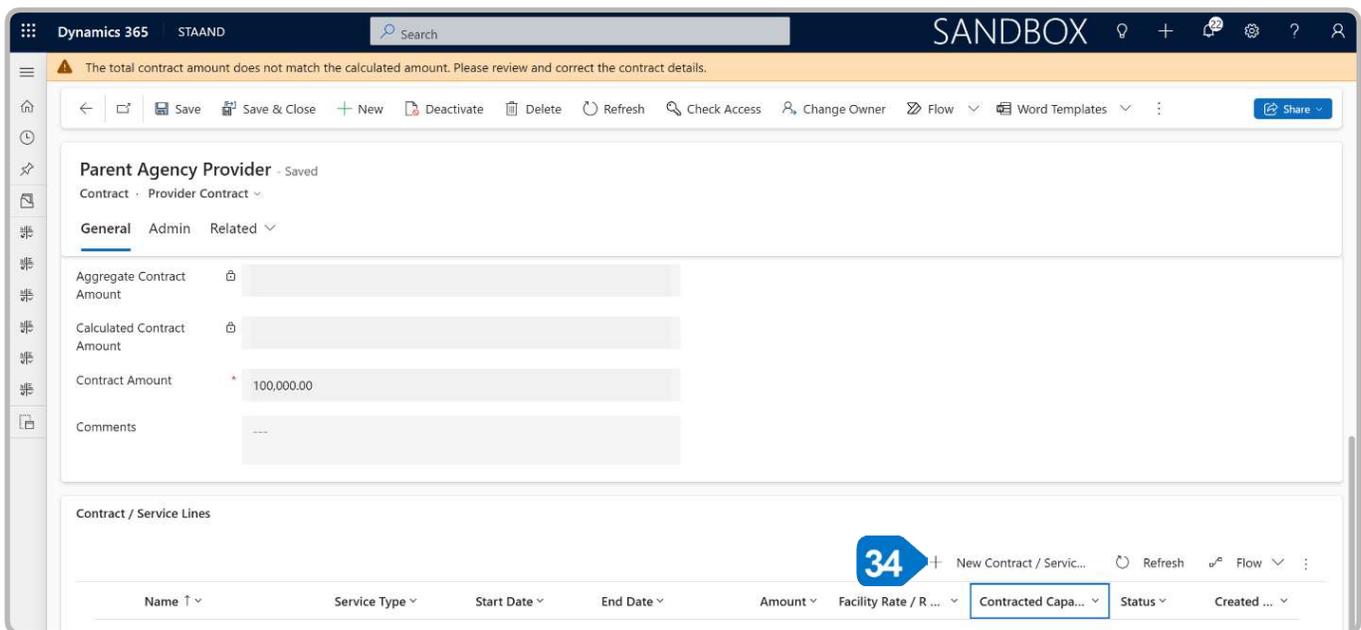
26. Select + New Contract.



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.

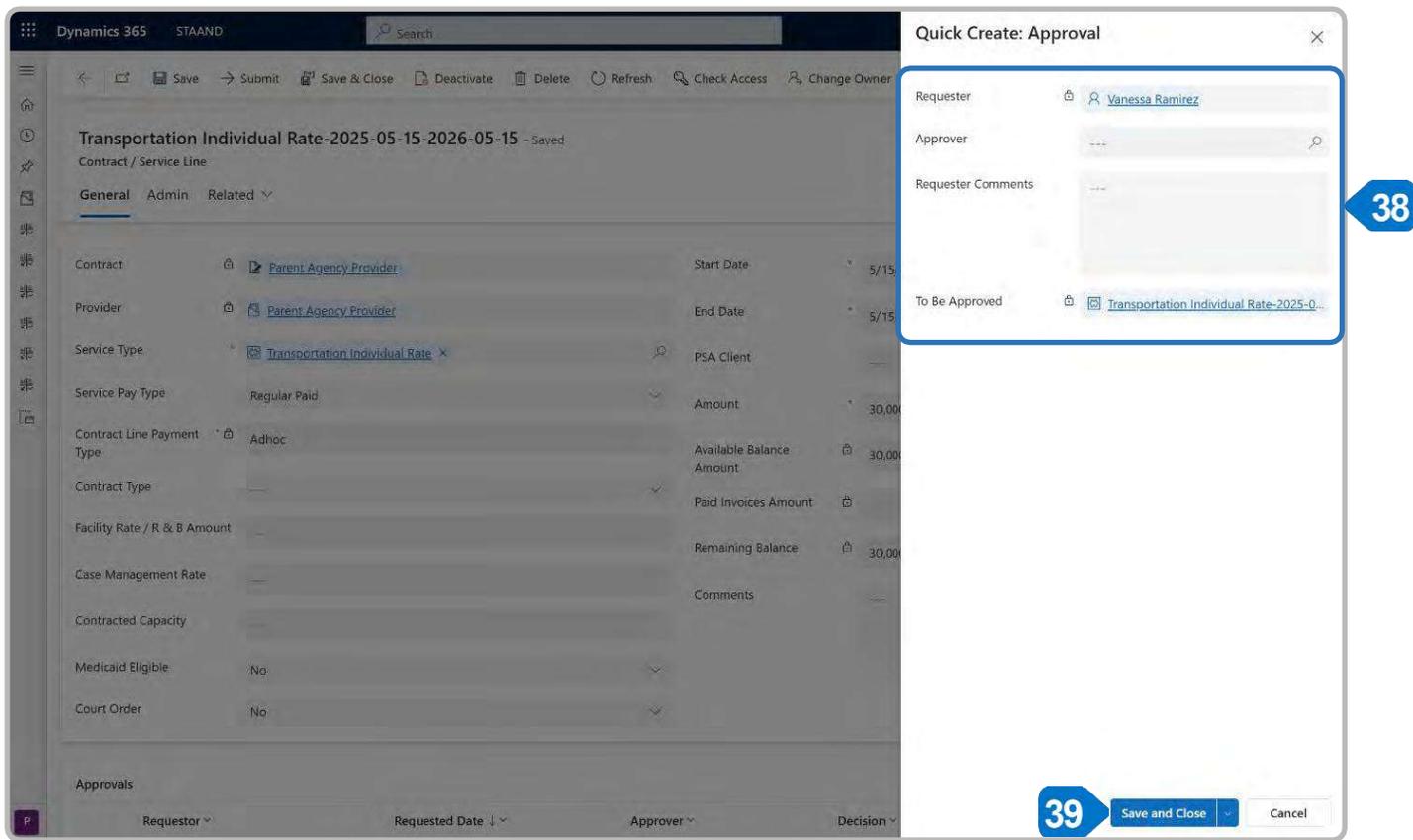
36

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.



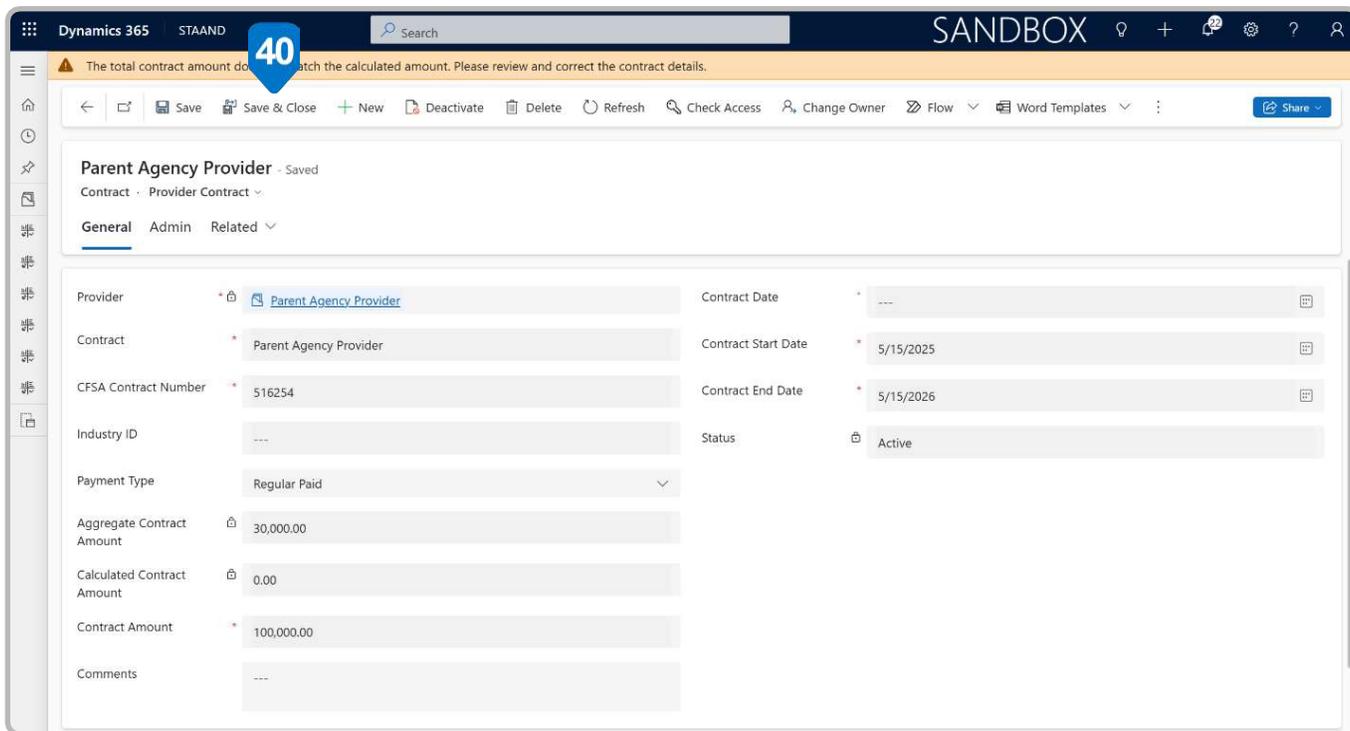
Important Tip:

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

Note:

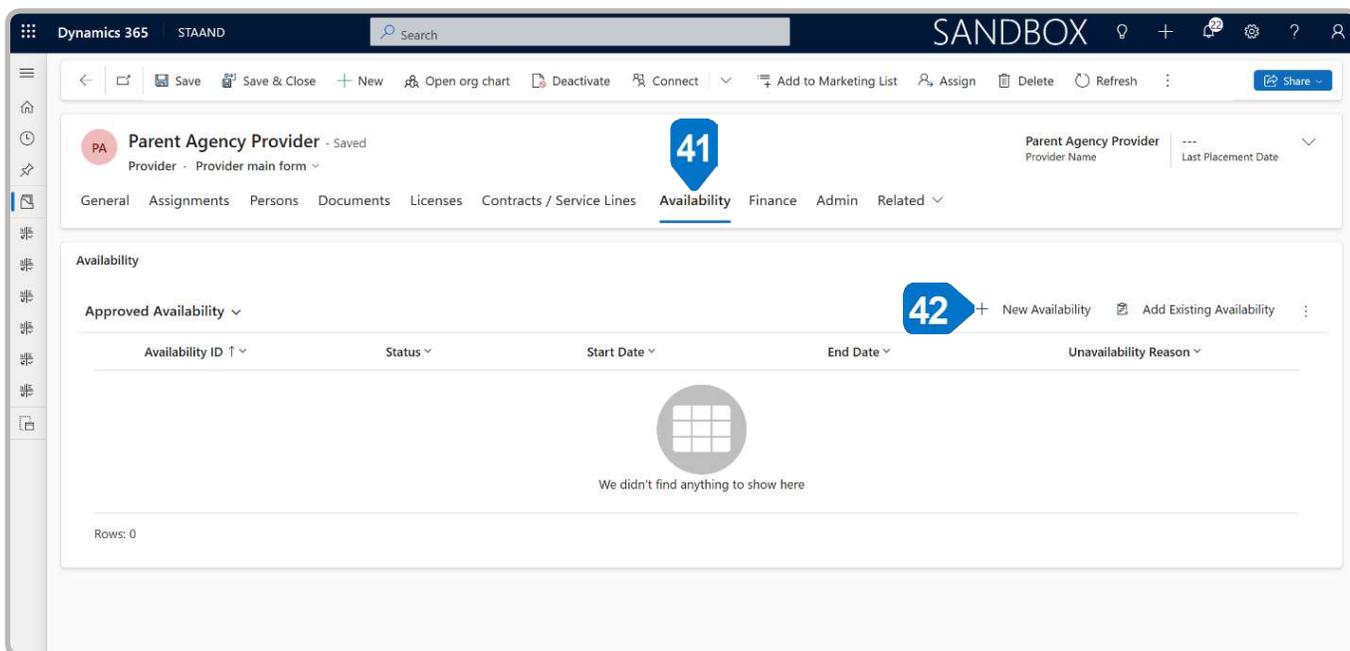
To approve, please refer to [How To: Approve Provider Records](#) on page 61.

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', a search bar, and 'SANDBOX'. Below the navigation bar, there are buttons for 'Save', 'Save & Close', '+ New', and 'Flow'. The main content area is titled 'New Availability' and has tabs for 'General', 'Admin', and 'Approvals'. A blue callout box with the number '44' in the top-left corner and '43' in the bottom-right corner highlights the 'General Availability' section. This section contains the following fields:

- Status: Available (dropdown menu)
- Start Date: --- (calendar icon)
- End Date: --- (calendar icon)
- Duration (In Days): --- (calendar icon)
- Provider: Parent Agency Provider (dropdown menu)
- Unavailability Reason: --- (dropdown menu)
- Approved?: No (toggle switch)
- Created On Portal?: No (toggle switch)

Note:

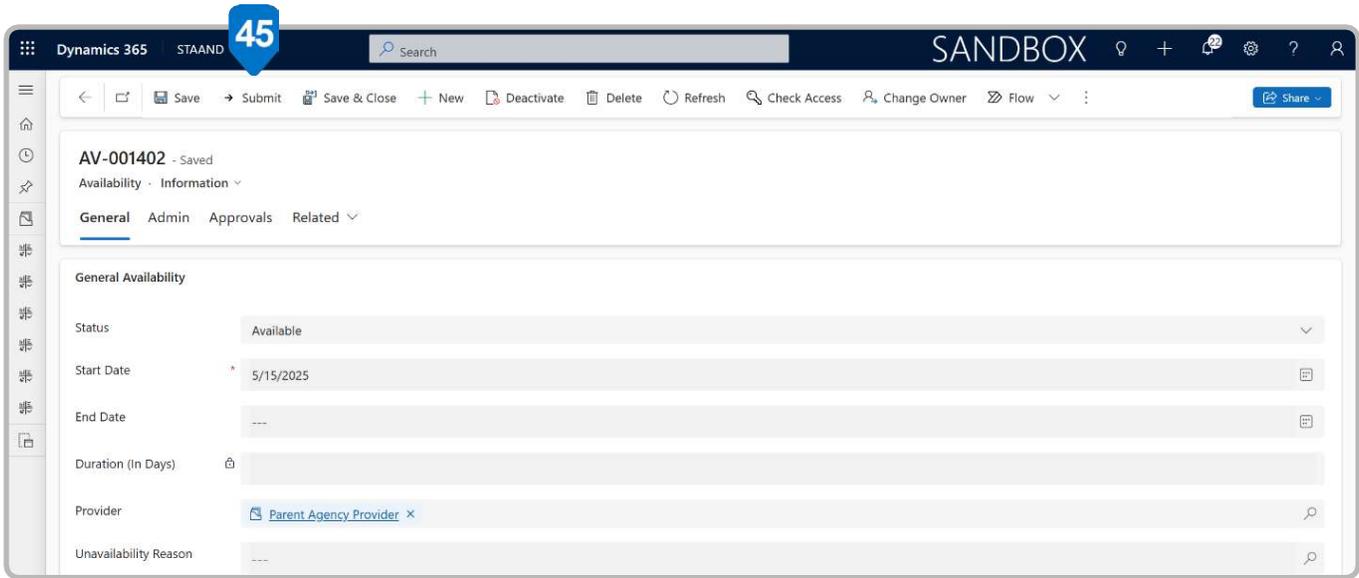
If an End Date is selected, the User will need to select an Unavailability Reason from the dropdown menu.

The screenshot shows the Dynamics 365 interface for creating a new availability record. The top navigation bar includes 'Dynamics 365', a search bar, and 'SANDBOX'. Below the navigation bar, there are buttons for 'Save', 'Save & Close', '+ New', and 'Flow'. The main content area is titled 'New Availability - Unsaved' and has tabs for 'General', 'Admin', and 'Approvals'. A green callout box highlights the 'Unavailability Reason' dropdown menu. The dropdown menu is open, showing the following options:

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

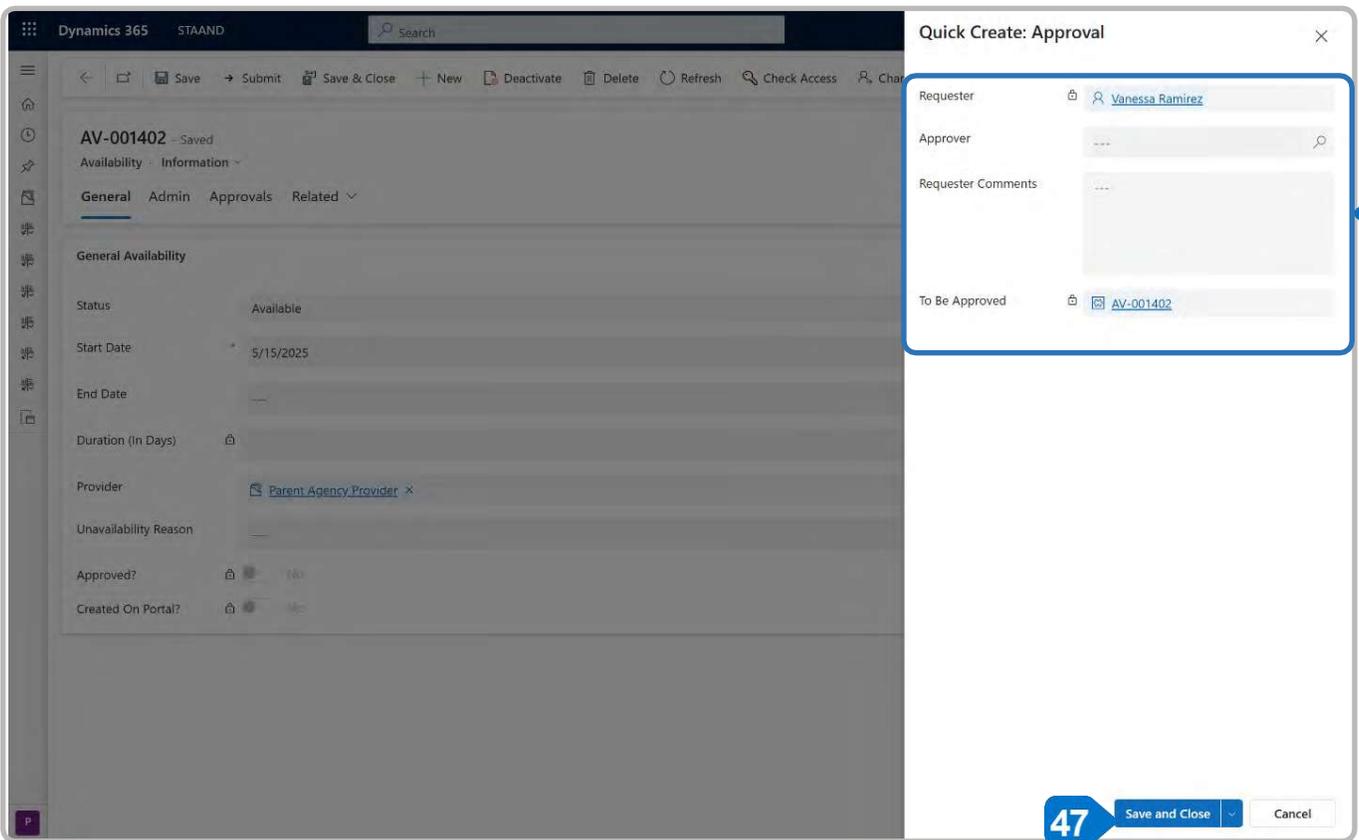
At the bottom of the dropdown menu, there is a search bar with the text 'Look for Unavailability Reason' and an 'Advanced lookup' link.

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.

The screenshot shows the Dynamics 365 interface for record AV-001402. The 'Approvals' tab is selected, displaying a table with the following data:

Requestor	Requested Date	Approver	Decision	Decision Date
<input type="checkbox"/> Vanessa Ramirez	5/15/2025 12:33 PM	Vanessa Ramirez	Approved	5/15/2025 5:34 PM

A blue callout bubble with the number 48 is positioned to the right of the table.

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

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

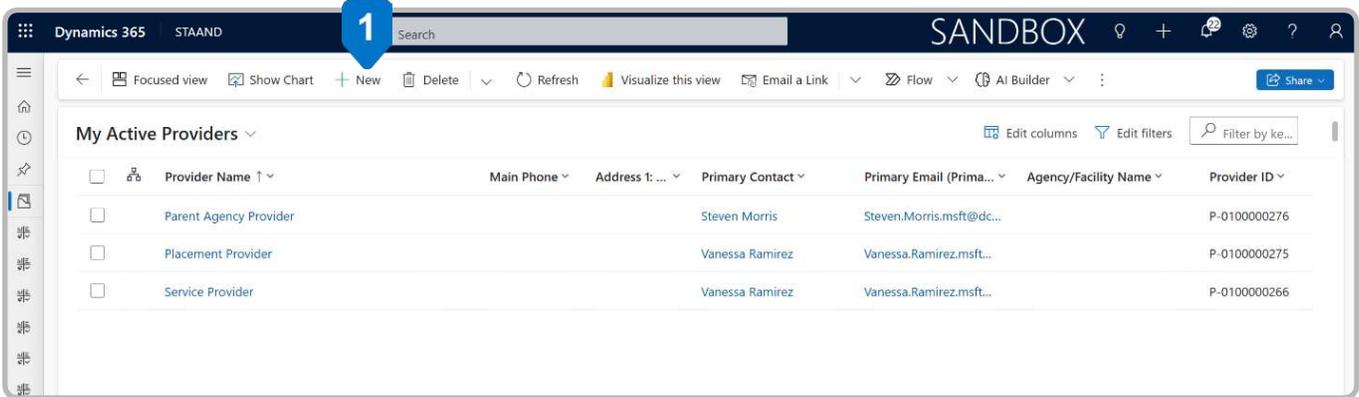
The screenshot shows the Dynamics 365 interface for record 'Parent Agency Provider'. The 'Finance' tab is selected, displaying two subgrids:

- Episodic Service Logs:** A table with columns: Entry ID, Assigned Agency, Provider, Child, Start Date, End Date, Contract (Contract/...), Contract/Service ..., Service Type (C...), and Created On. The table is empty, showing a message: "We didn't find anything to show here".
- Invoices:** A table with columns: Invoice Nu..., Agency/Prov..., Service Type, Invoice Amo..., Invoice Approved Am..., Invoice Paid Amo..., Invoice Submite..., Invoice Sta..., and Approval ST... The table is empty, showing a message: "We didn't find anything to show here".

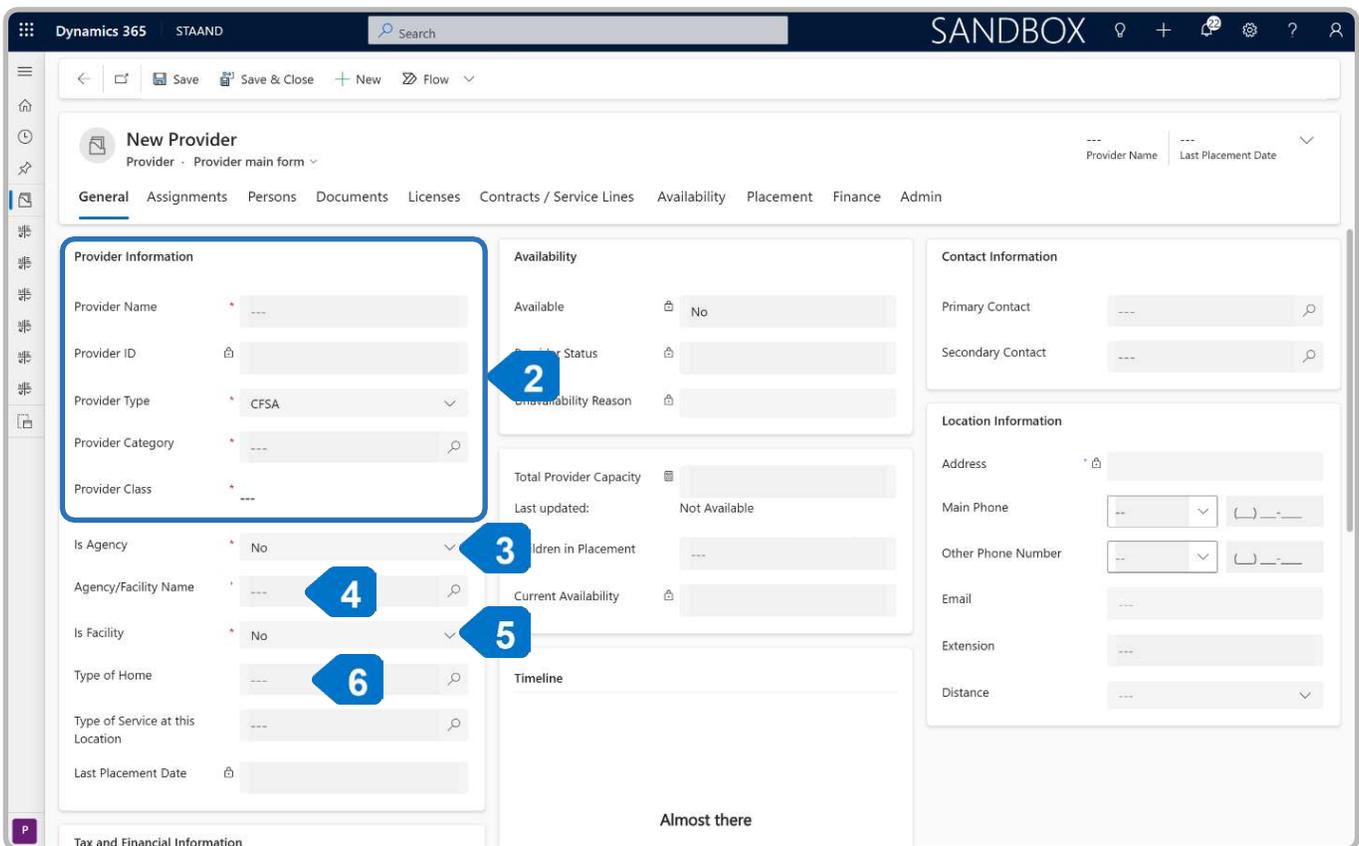
A blue callout bubble with the number 50 is positioned to the right of the Invoices subgrid.

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.

The screenshot displays the Dynamics 365 interface for a 'Facility Provider' record. The top navigation bar includes 'Dynamics 365', a search bar, and the 'SANDBOX' environment. The main header shows the record name 'Facility Provider - Saved' and a dropdown menu for 'Facility Provider' with options for 'Provider Name' and 'Last Placement Date'. Below the header is a tabbed interface with 'General' selected. The 'General' tab contains several sections:

- Provider Information:** Fields for 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, and Last Placement Date.
- Availability:** Fields for Available (No), Provider Status, Unavailability Reason, Total Provider Capacity (0), Last updated (5/15/2025 12:43 PM), Children in Placement, and Current Availability (0).
- Contact Information:** Fields for Primary Contact and Secondary Contact.
- Location Information:** Field for Address and a 'Select all' button.
- Timeline:** A section for adding notes with a search bar and an 'Enter a note...' field.

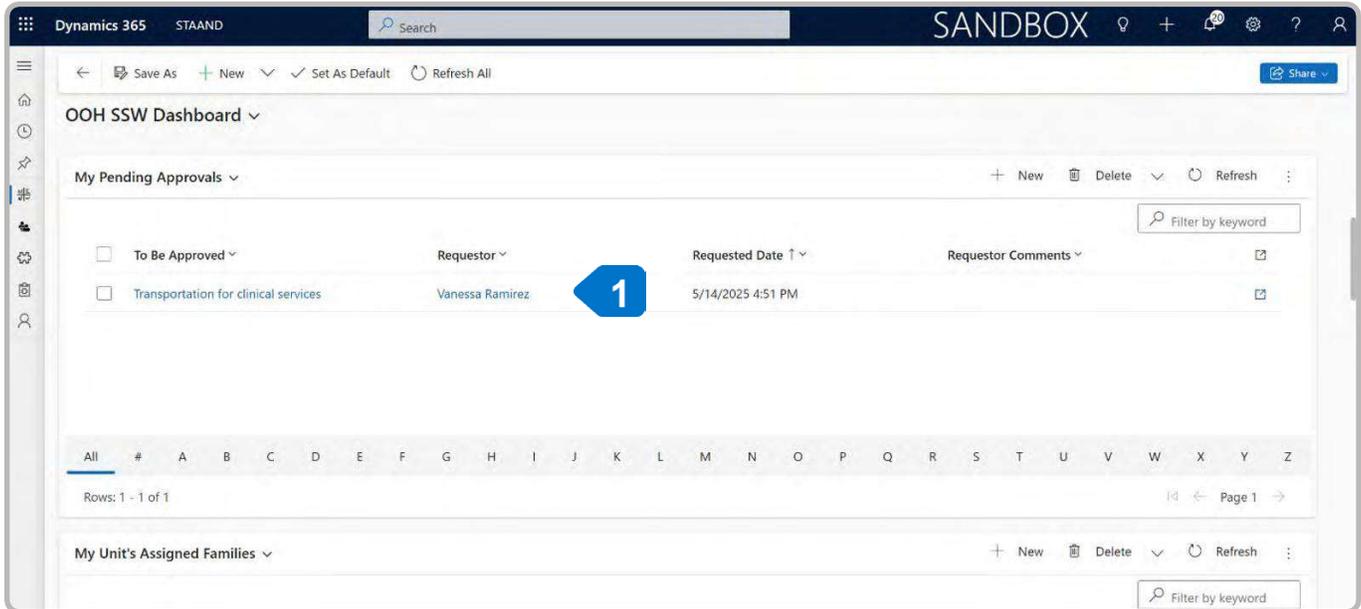
At the bottom of the form, a 'Tax and Financial Information' section is partially visible.

Approving Provider Records

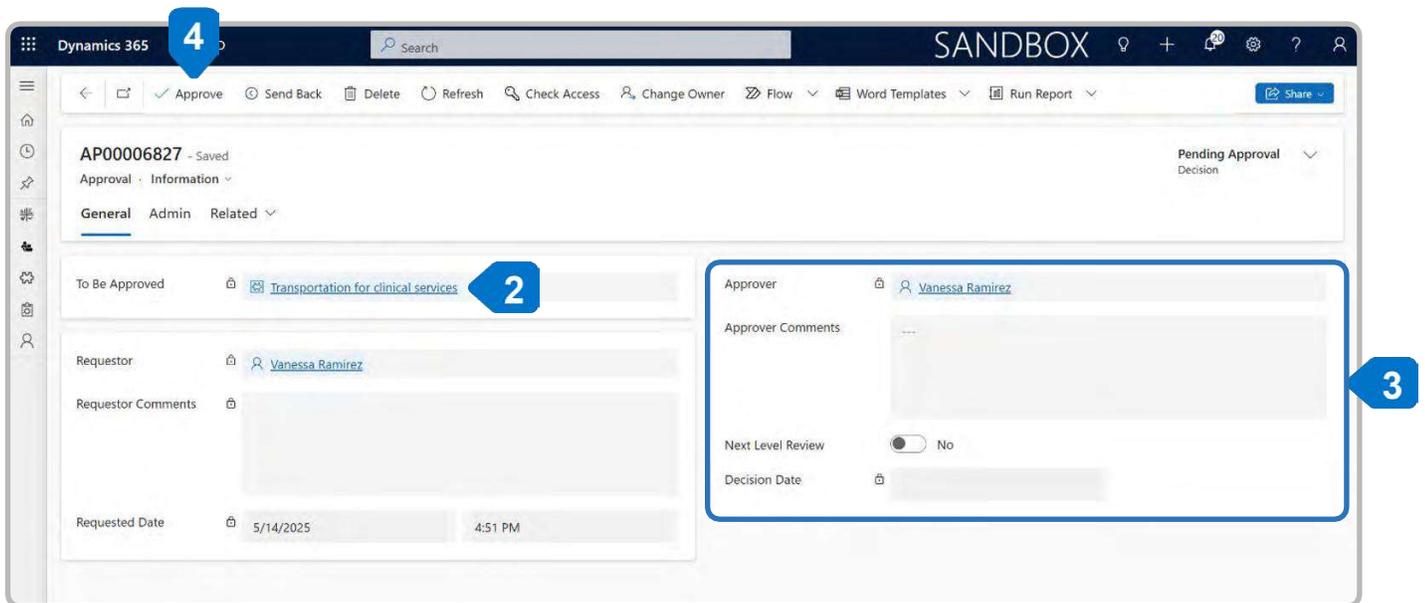


How To: Approve Provider Records

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.



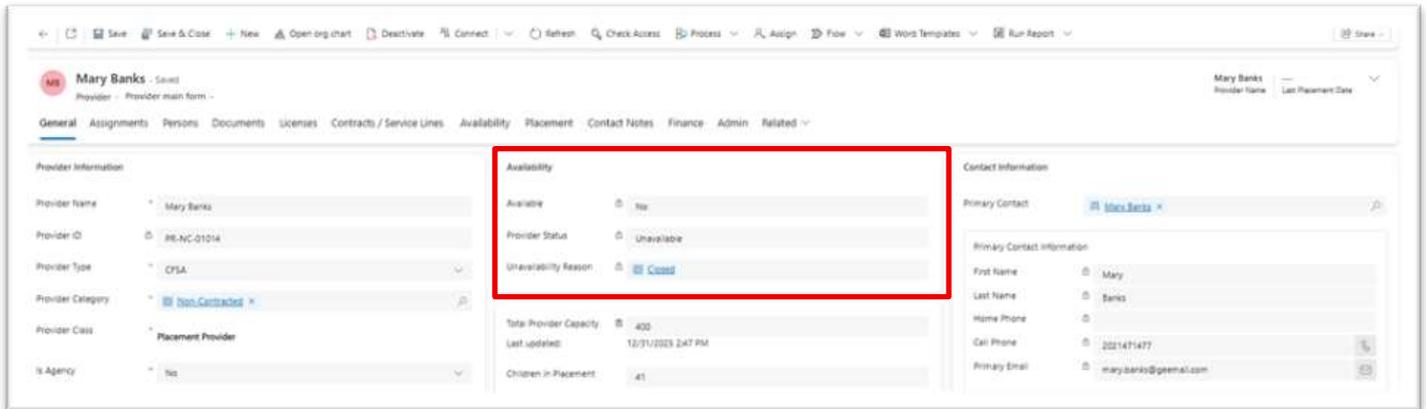
Checking Provider Availability



How To: Check Provider Availability

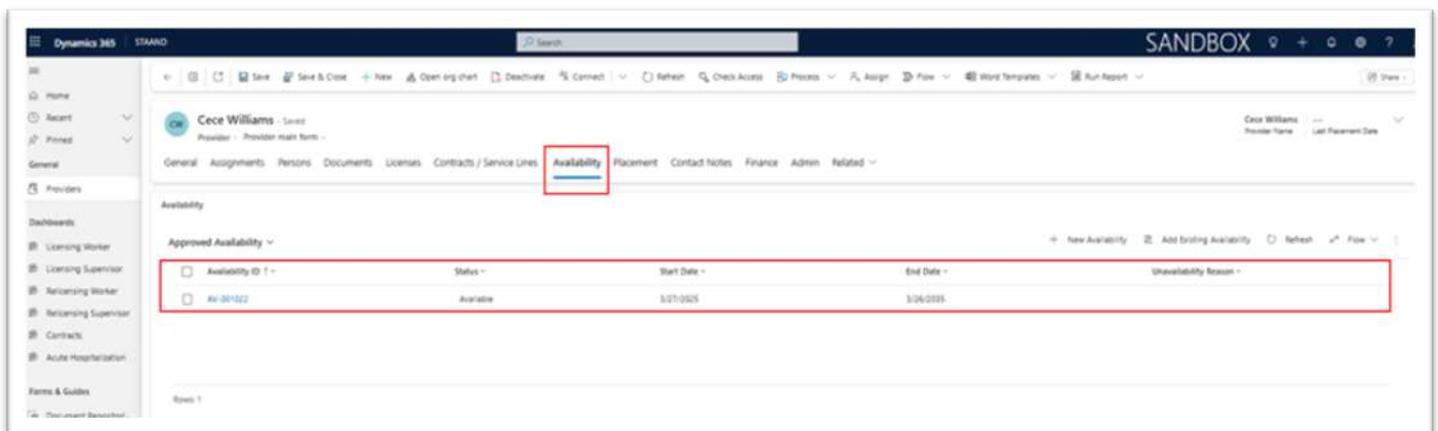
The availability of the provider is in two areas of STAAND; under the General and Availability tabs of the Provider record.

General Tab

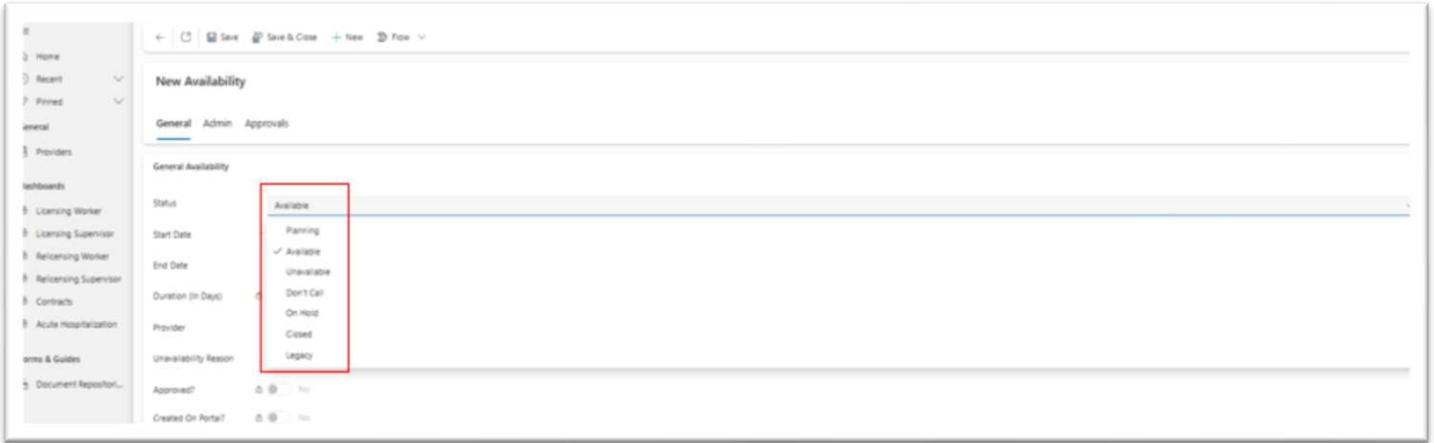


Availability Tab

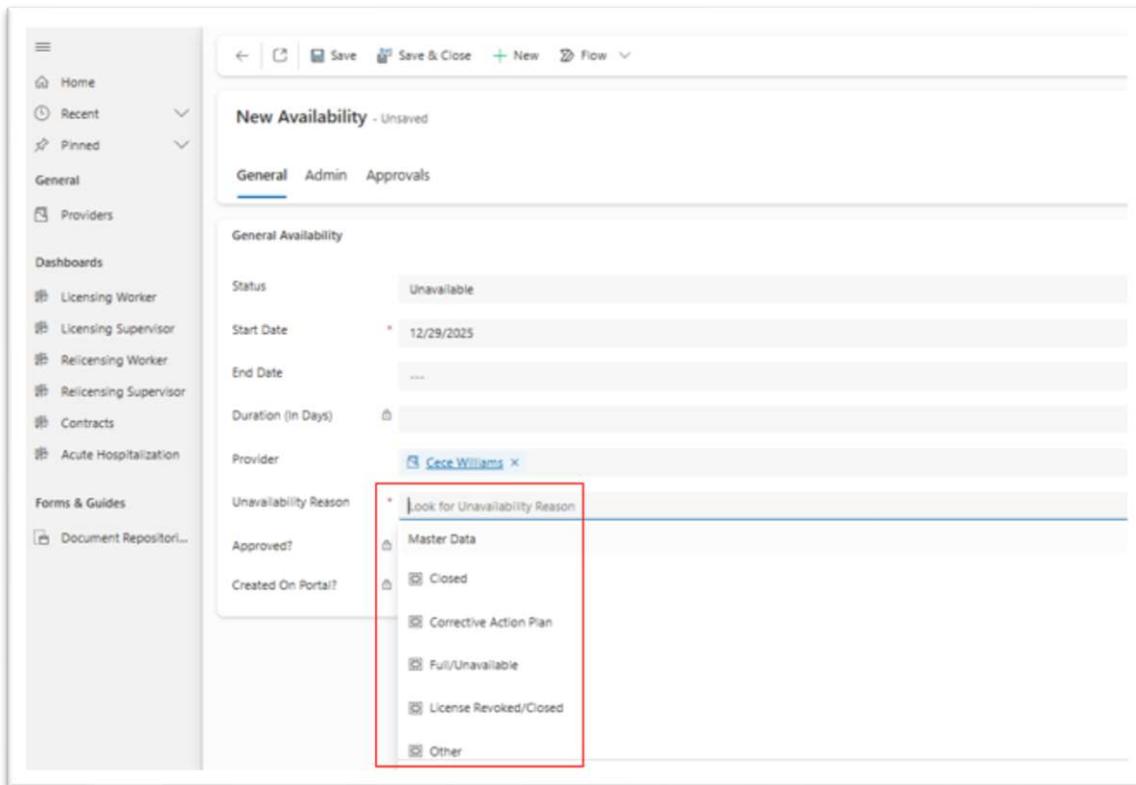
1. This Availability tab reveals the Availability ID, Status of the provider and the Start and End dates and the Unavailability Reason.



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.



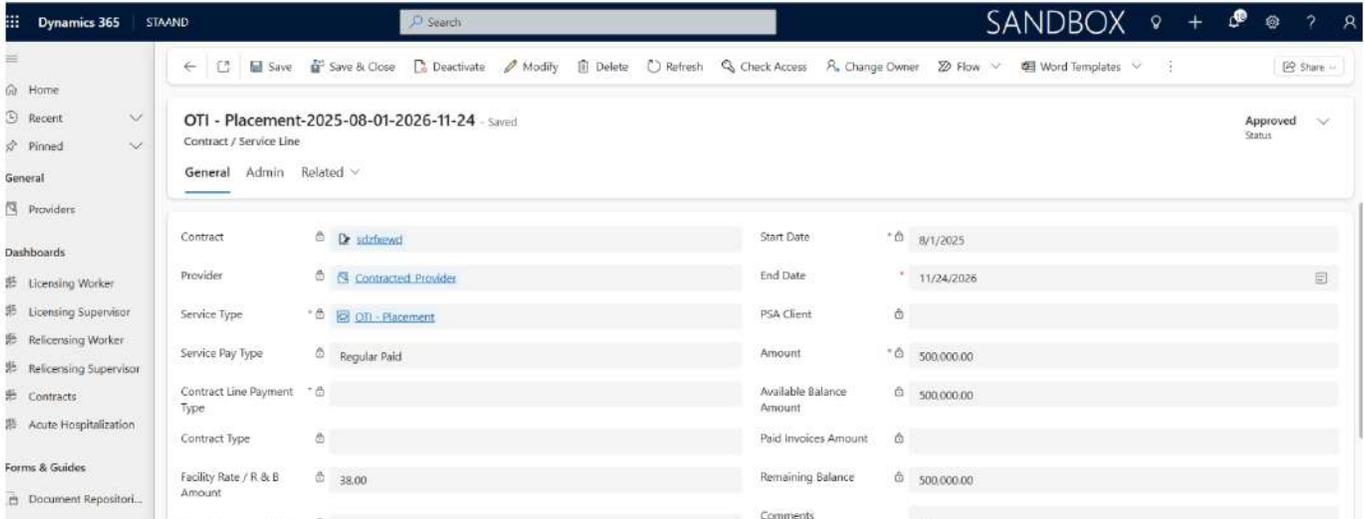
4. Enter the Start Date (required field) and End Date (if available).
5. Select the Unavailability Reason from the dropdown options. If Other is selected, type the reason in the narrative box.



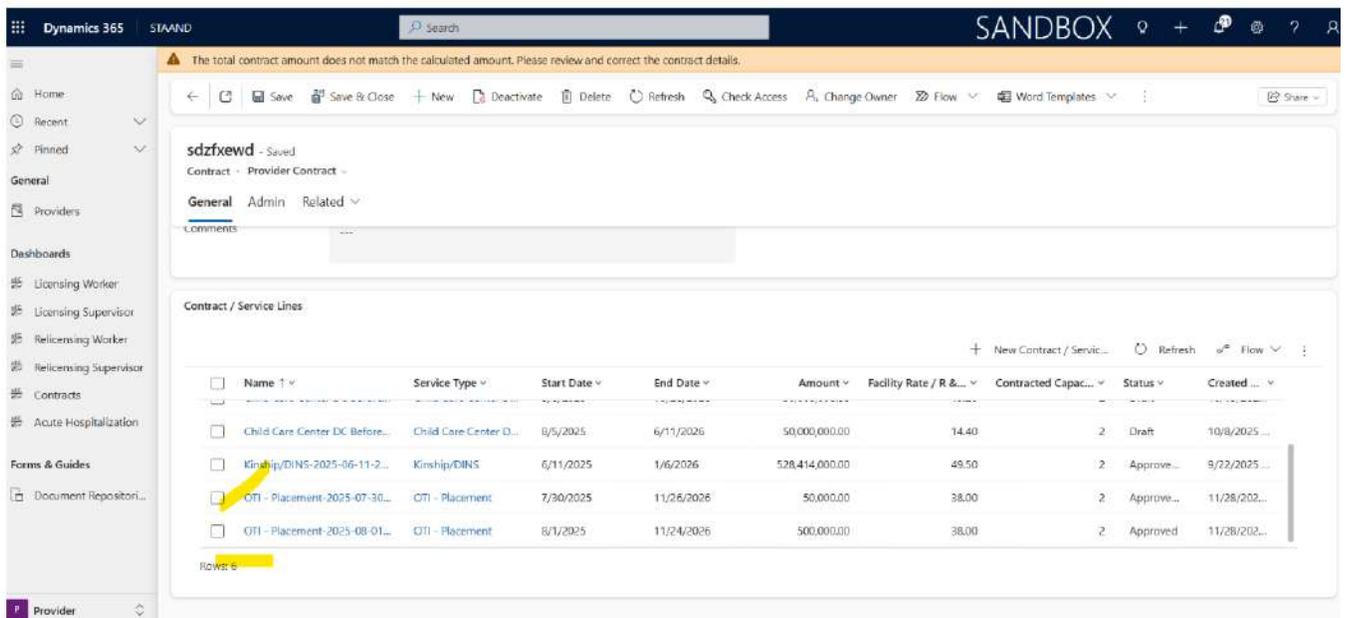
6. Save and Close.

How To: Transfer Service Logs and Provider Assignments

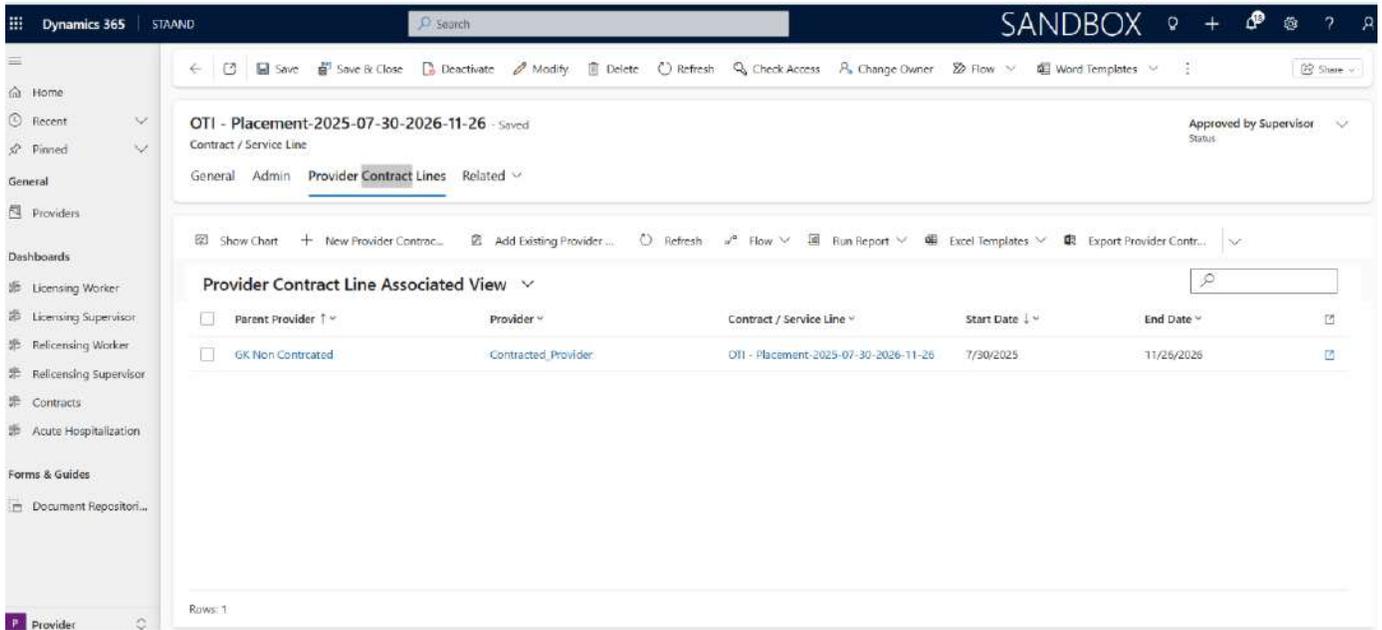
1. Open the Provider record.
2. Navigate to the Contract/ Service line.



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.

