

# Adding a Provider/Resource to CONNECTIONS

# Adding a Provider to CONNECTIONS



From the CONNECTIONS Toolbar

Click on 'Maintain'

From the Drop Down Menu

Select 'Resource'

# Adding a Provider to CONNECTIONS

PSEUDO15 - CONNECTIONS Toolbar - Sodher, Cynthia

Intake Options Maintain Search Help

TO-DO WORK UNIT PCRS CASE RSRC STAFF RPTS

**Resource Search Criteria**

File Edit Help

Search Type: **Phonetic Name** Resource Name: **Maxie's taxi**

Type

Resource Type:  NYC Sub-Agency:

Facility Type/LOC:  Agency ID:

**Services**

Category:  Service:  Contract Status:

**Population**

Age:  Sex:  Characteristics:

**Attributes**

Transportation  
 Inactive

**Area Served/Location**

Street 1:   
Street 2:  City:   
County: **ERIE** State: **NY** CD:   
Zip:   Area Served **Validate**

**Identifiers**

Resource ID:   
Case ID:   
Vendor ID:

**Search...** **Clear** **Cancel**

‘Resource Search Criteria’ window will open .

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In ‘Resource Name’ Box, type in Resource Name.

Click on ‘Search’ button.

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# Adding a Provider to CONNECTIONS

The screenshot shows the 'Resource List' window in the PSEUDO15 - CONNECTIONS software. The window has a menu bar with 'File', 'Options', 'Sort', and 'Help'. Below the menu bar is a toolbar with icons for 'TO-DO', 'WORK', 'UNIT', 'PCRS', 'CASE', 'RSRC', 'STAFF', and 'RPTS'. The main area contains a table with the following columns: Resource Name, VID, Facility Type/LOC, Status, Auth By, and M. The table lists various foster homes and their details.

Resource Name	VID	Facility Type/LOC	Status	Auth By	M
Ma e	00 72	Certified Foster Home	Inactive	OCFS	
Ma a	S/ 14	Adoptive Home	Active	OCFS	
Ma	00 74	Certified Foster Home	Inactive	OCFS	
Ma nna J	4 5		Active		
Ma a	00 44	Certified Foster Home	Inactive	OCFS	
Ma e			Inactive		
Ma i	00 43	Approved Relative Fost	Inactive	OCFS	
Ma a	S/ 14	Adoptive Home	Inactive		
Ma e	00 85	Certified Foster Home	Inactive	OCFS	
Ma se	00 68	Certified Foster Home	Inactive	OCFS	
Ma e	00 51	Approved Relative Fost	Inactive	OCFS	
Ma e	00 81	Approved Relative Fost	Inactive	OCFS	
Ma e	00 90	Certified Foster Home	Inactive	OCFS	
Ma se	00 68	Foster/Adoptive Home	Active		
Ma y S			Active		
Ma ce	00 28	Approved Relative Fost	Active	OCFS	
Ma se			Inactive		
Ma se		Certified Foster Home	Inactive		

At the bottom of the window, there are buttons for 'Detail...', 'New', 'Rsrc Search', 'OK', and 'Close'.

This is the return of the first search.

You must Scroll all the way to the Bottom to make sure the Provider does not already exist.

# Adding a Provider to CONNECTIONS

The screenshot shows the 'CONNECTIONS' software interface. At the top is a toolbar with icons for TO-DO, WORK, UNIT, PCRS, CASE, RSRC, STAFF, and RPTS. Below the toolbar is the 'Resource List' window, which contains a table of resources. An error message dialog box is overlaid on the table, stating 'Listbox is full. Please narrow search criteria before adding new resources.' The dialog has 'OK' and 'Help' buttons. An arrow points to the 'OK' button. At the bottom of the 'Resource List' window are buttons for 'Detail...', 'New', 'Rsrc Search', 'OK', and 'Close'.

Resource Name	VID	Facility Type/LOC	Status	Auth By	M
Ma...ge	01	72 Certified Foster Home	Inactive	OCFS	
Ma...da	S	4 Adoptive Home	Active	OCFS	
Ma...	01	74 Certified Foster Home	Inactive	OCFS	
Ma...anna J					
Ma...da					
Ma...se					
Ma...n					
Ma...da					
Ma...ie					
Ma...se					
Ma...ie	01	71 Approved Relative Fost	Inactive	OCFS	
Ma...ie	01	71 Approved Relative Fost	Inactive	OCFS	
Ma...ie	01	70 Certified Foster Home	Inactive	OCFS	
Ma...se	01	68 Foster/Adoptive Home	Active		
Ma...y S			Active		
Ma...ice	01	78 Approved Relative Fost	Active	OCFS	
Ma...se			Inactive		
Ma...ise			Inactive		

# Adding a Provider to CONNECTIONS

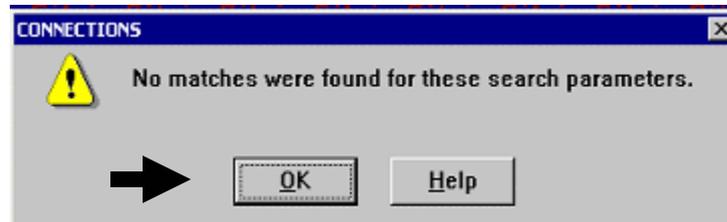
The screenshot shows the 'Resource Search Criteria' dialog box with the following fields and values:

- Search Type:** Exact/Directory (indicated by a black arrow)
- Resource Name:** Maxie's taxi
- Resource Type:** Provider
- Facility Type/LOC:** (empty)
- NYC Sub-Agency:** (empty)
- Agency ID:** (empty)
- Services:**
  - Category: (empty)
  - Service: (empty)
  - Contract Status: (empty)
- Population:**
  - Age: (empty)
  - Sex: (empty)
  - Characteristics: (empty)
- Attributes:**
  - Transportation
  - Inactive
- Area Served/Location:**
  - Street 1: (empty)
  - Street 2: (empty)
  - City: (empty)
  - County: ERIE
  - State: NY
  - CD: (empty)
  - Zip: (empty)
  - Area Served
  - Validate** button
- Identifiers:**
  - Resource ID: (empty)
  - Case ID: (empty)
  - Vendor ID: (empty)

Buttons at the bottom: **Search...**, **Clear**, **Cancel**

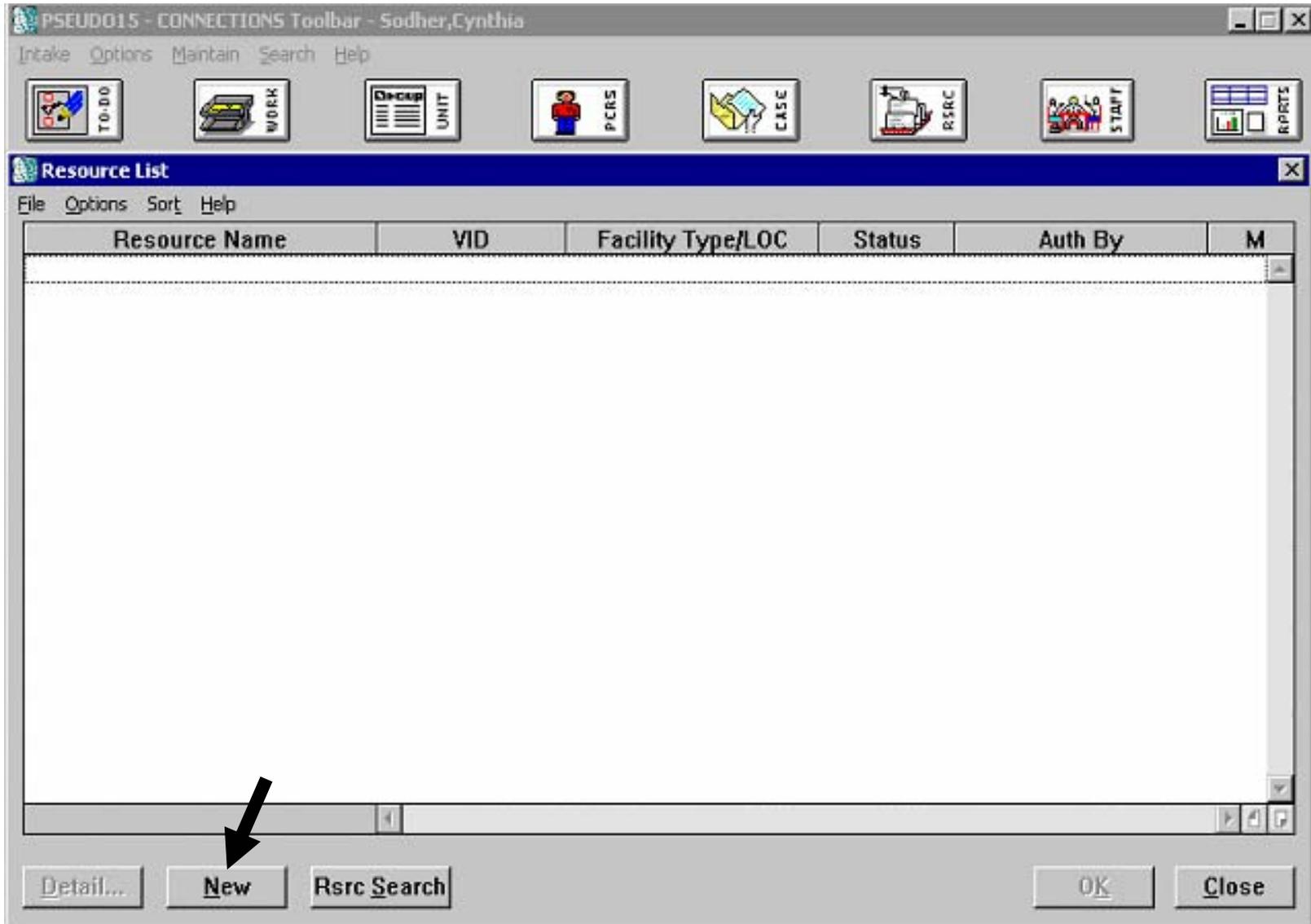
You can narrow your Search by selecting Exact/Directory in the “Search Type:” Box.

# Adding a Provider to CONNECTIONS



If Resource is not known to CONNECTIONS the above pop up window will appear. Click OK and a Blank Resource List will appear.

# Adding a Provider to CONNECTIONS



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When the CONNECTIONS blank 'Resource List Window' opens,  
Click on 'New' button.

# Adding a Provider to CONNECTIONS

Legal Name: Maxie's Taxi

Resource Name: Maxie's Taxi

Resource Type: Provider

Resource Status: Active

Hrs. of Oper.:

Ownership: Proprietary

1099 Status: 1099/SSN required

Contact:

Tax ID: 111-11-1111

Prime  Sub  Auth for Clear  Transportation  Resource Lien Filed

Last Update Date: 02/27/2004 Last Update By: Sodher,Cynthia

Save Cancel

Resource Detail-New' window will open

In 'Legal Name' area type in the Legal Name of the Resource.

In 'Resource Name' area type in Name of Resource.

In 'Resource Type' area select 'Provider' from the drop down menu.

In 'Resource Status' area select 'Active' from the drop down menu.

In 'Hrs of Oper' area enter Resource Operating Hours (if available).

In 'Contact' area type in Name of Contact Person at the Resource (if available).

In 'Ownership' area select 'Proprietary' (For Profit), 'Public' or 'Not for Profit' from the drop down menu.

In '1099 Status' area select one of the following from the drop down menu:

'1099 required – SSN' (can be selected when 'Ownership' has been designated as "Proprietary" or "Public").

'1099 – Employer ID required' (can be selected when 'Ownership' has been designated as "Proprietary" or "Public").

No 1099 required (can be selected when 'Ownership' has been designated as "Not for Profit" or "Public").

In 'Tax ID' field enter the Resource Tax Identification Number (TIN) or Social Security Number (SSN) of the Resource. A TIN or SSN is required in this field when 1099 status has been selected as '1099 Required'. ***If the TIN/SSN is not recorded in CONNECTIONS, the vendor will not be updated in BICS.***

If the Resource provides transportation – click in check box next to 'Transportation'.

# Adding a Provider to CONNECTIONS

Connections PSEUDO Desktop 95% - Citrix ICA Client

PSEUDO15 - CONNECTIONS Toolbar - Sodher,Cynthia

Intake Options Maintain Search Help

TO-DO WORK UNIT PCRS CASE RESC STAFF RPTS

Resource Detail - Maxie's Taxi - R:20165256

File Edit Options Help

Legal Name: Maxie's Taxi

Resource Name: Maxie's Taxi

Resource Type: Provider

Resource Status: Active

Fac. Type/LOC:

Contact:

Sub-Agency:

School Dist:

Vendor ID:

Agency ID:

Maintainer: AST

Hrs. of Oper.:

Ownership: Proprietary

1099 Status: No 1099 Required

Resource 1099 Name:

Tax ID: 111-11-1111

Address...

Phone...

Prime  Sub  Auth for Clear  Transportation  Resource Lien Filed

Update Information

Last Update Date: 03/09/2004 Last Update By: Sodher,Cynthia

Facility... Svc Area... Comments...  Comments Save Cancel

Click on 'address' and the 'Resource Address Detail' window will open.

# Adding a Provider to CONNECTIONS

Resource Address Detail - Maxie's Taxi

File Edit Help

Type	Vendor ID	Street	PO Box/Apt#
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Address Information

Type: Primary Vendor ID:

Comments:

Street: 97 franklin

PO Bx/Apt:

Attn:

City: buffalo State: NY Zip:

County: ERIE CD:  Sch Dist:

Validate Add Modify Delete Clear

OK Cancel

In **'Type'** area select **'Primary'** from drop down menu.

Fill in address fields – street, city, county, state

and any other fields that apply.

# Adding a Provider to CONNECTIONS

PSEUDO15 - CONNECTIONS Toolbar - Sodher,Cynthia

Intake Options Maintain Search Help

TO-DO WORK UNIT PERS CASE RSRC STAFF PARTS

Resource Address Detail - Maxie's Taxi

File Edit Help

Type	Vendor ID	Street	PO Box/Apt#

Address Information

Type: Primary Vendor ID:

Street: 97 franklin

PO Bx/Apt:

Attn:

City: buffalo State: NY Zip:

County: ERIE CD: Sch Dist:

Validate Add Modify Delete Clear

OK Cancel

Replace with CODE-1 validated address?

97 FRANKLIN

97 FRANKLIN

BUFFALO NY

14202-9209

ERIE

Yes No

Click 'Validate', the system will validate the address.

If the address is correct click 'yes' and address will be replaced with validated address. Click 'Add'

# Adding a Provider to CONNECTIONS

Resource Address Detail - Maxie's Taxi

File Edit Help

Type	Vendor ID	Street	PO Box/Apt#
Business	1556TX	97 FRANKLIN	
Primary		97 FRANKLIN	

Address Information

Type: Business Vendor ID: 1556TX

Street: 97 FRANKLIN

PO Bx/Apt:

Attn:

City: BUFFALO State: NY Zip: 14202-9209

County: ERIE CD: Sch Dist:

Validate Add Modify Delete Clear

OK Cancel

If business address is the same as primary address, as entered above – type in District assigned ‘Vendor Id’, Select Business from the ‘Type’ and click on ‘Add’.

If business address is different from primary address, as entered above, make changes to address fields and type in District assigned Vendor ID Number and click on ‘Add’.

# Adding a Provider to CONNECTIONS

Connections PSEUDO Desktop 95% - Citrix ICA Client

PSEUDO15 - CONNECTIONS Toolbar - Sodher,Cynthia

Intake Options Maintain Search Help

TODD WORK UNIT PERS CASE RESC STAFF RPTS

Resource Detail - Maxie's Taxi - R:20165256

File Edit Options Help

Legal Name: Maxie's Taxi

Resource Name: Maxie's Taxi

Resource Type: Provider

Resource Status: Active

Fac. Type/LOC:

Contact:

Sub-Agency:

School Dist:

Vendor ID: 1556TX

Agency ID: Maintainer: AST

Hrs. of Oper.:

Ownership: Proprietary

1099 Status: No 1099 Required

Resource 1099 Name:

Tax ID: 111-11-1111

Address...

Phone...

Prime  Sub  Auth for Clear  Transportation  Resource Lien Filed

Update Information

Last Update Date: 03/09/2004 Last Update By: Sodher,Cynthia

Facility... Svc Area... Comments...  Comments Save Cancel

Click on 'Phone' button.

# Adding a Provider to CONNECTIONS

Resource Phone Detail - Maxie's Taxie

File Edit Help

Phone Type	Phone	Ext.	Phone Comments
Business	(555) 555-1234		
Primary	(555) 555-1212		

Phone Information

Phone Type: Business

Number: (555) 555-1234

Extension:

Comments:

Add Modify Delete Clear

OK Cancel

Resource Phone Detail' window will open.

In 'Phone Type' area select 'Primary' from drop down menu.

In 'Number' area type in telephone number with area code Click on 'Add' button.

In 'Phone Type' area select 'Business' from drop down menu.

In 'Number' area, if business number is different from primary, type in telephone number with area code. 15

Click on 'Add' button.

Click on 'Ok' button .

# Adding a Provider to CONNECTIONS

Resource Detail - Maxie's Taxi - R:20165256

File Edit Options Help

Legal Name:	Maxie's Taxi		
Resource Name:	Maxie's Taxi	Vendor ID:	1556TX
Resource Type:	Provider	Agency ID:	Maintainer: AST
Resource Status:	Active	Hrs. of Oper.:	
Fac. Type/LOC:		Ownership:	Proprietary
Contact:		1099 Status:	No 1099 Required
Sub-Agency:		Resource 1099 Name:	
School Dist:		Tax ID:	111-11-1111

Prime    Sub    Auth for Clear    Transportation    Resource Lien Filed

Address...  
Phone...

Update Information

Last Update Date: 03/09/2004   Last Update By: Sodher,Cynthia

→ Svc Area...   Comments...    Comments   Save   Cancel

'Resource Detail' window will reopen.  
Click on 'SVC Area' button.

# Adding a Provider to CONNECTIONS

PSEUDO15 - CONNECTIONS Toolbar - Sodher, Cynthia

Intake Options Maintain Search Help

TO-DO WORK UNIT PERS CASE RSRC STAFF RPTS

Resource Detail - Maxie's Taxi - R:20165256

File Edit Options Help

Legal Name: Maxie's Taxi

Resource Name: Maxie's Taxi Vendor ID: 1556TX

Resource Type: Provider Agency ID: Maintainer: AST

Resource Status: Active

Fac. Type/LOC:

Contact:

Sub-Agency:

School Dist: Tax ID: 111-11-1111 Address... Phone...

Prime  Sub  Auth for Clear  Transportation  Resource Lien Filed

Update Information

Last Update Date: 03/09/2004 Last Update By: Sodher, Cynthia

Facility... Svc Area... Comments...  Comments Save Cancel

**CONNECTIONS**

? Navigating to Svc by Area requires saving Resource Detail data. Save?

Yes No Help

Dialogue box will appear and ask “Navigating to SVC by Area requires saving Resource Detail Data. Save?”. Click on ‘Yes’.

# Adding a Provider to CONNECTIONS

Services by Area - Maxie's Taxi

File Edit Options Help

Services Provided: All

Category	Service	C	County	P	Inc	State
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Services

Category: Foster Care → Service: Transportation - Regular

State: NY → County: ERIE

All Counties  
 Partial County  
 Income Based

Populat... → Add Modify Delete Clear

Save Cancel

'Services by Area' window will open.

In 'Category' area select applicable category from drop down menu.

In 'Service' area, select applicable services from drop down menu.

In 'State' area, select from drop down menu the State where the Resource is located.

In 'County' area, select from drop down menu the County where the Resource is located.

Click on 'Add'.

# Adding a Provider to CONNECTIONS

Services by Area - Maxie's Taxi

File Edit Options Help

Services Provided: All

Category	Service	C	County	P	Inc	State
Foster Care	Transportation - Regular	N	ERIE	N	N	NY

Services

Category: Foster Care Service: Transportation - Regular

State: NY County: ERIE

All Counties  
 Partial County  
 Income Based

Populat... Add Modify Delete Clear

Save Cancel



Click on 'Save'.

# Adding a Provider to CONNECTIONS

**PSEUDO15 - CONNECTIONS Toolbar - Sodher,Cynthia**

Intake Options Maintain Search Help

TO-DO WORK UNIT PEKS CASE RS&C STAFF RPTS

**Resource Detail - Maxie's Taxi - R:20161973**

File Edit Options Help

Legal Name: Maxie's Taxi

Resource Name: Maxie's Taxi

Resource Type: Provider

Resource Status: Active

Fac. Type/LOC:

Contact:

Sub-Agency:

School Dist:

Vendor ID: 1556TX

Agency ID: Maintainer: AST

Hrs. of Oper.:

Ownership: Proprietary

1099 Status: 1099/SSN required

Resource 1099 Name:

Tax ID: 111-11-1111

Prime  Sub  Auth for Clear  Transportation  Resource Lien Filed

Update Information

Last Update Date: 02/27/2004 Last Update By: Sodher,Cynthia

Facility... Svc Area... Comments...  Comments

Address... Phone...

Cancel

'Resource Detail Window' will reopen.  
Click on 'Cancel'.

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**FINISHED**

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