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'

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'**Resource Search Criteria'** window will open .

In **'Resource Name'** Box, type in Resource Name.

Click on 'Search' button.

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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.

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If you get this message box you must narrow your Search criteria before adding a new Provider. Click on 'OK'.

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You can narrow your Search by selecting Exact/Directory

in the "**Search Type:"** Box.

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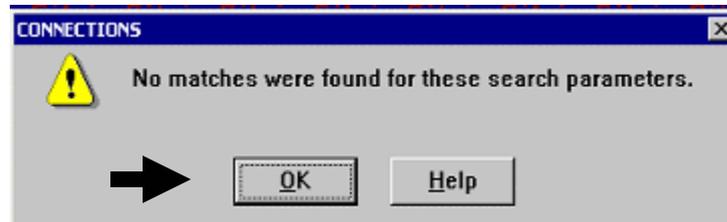
If Resource is not known to CONNECTIONS the above pop up window will appear. Click OK and a Blank Resource List will appear.

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When the CONNECTIONS blank 'Resource List Window' opens,

Click on 'New' button.

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Resource Detail-New' window will open

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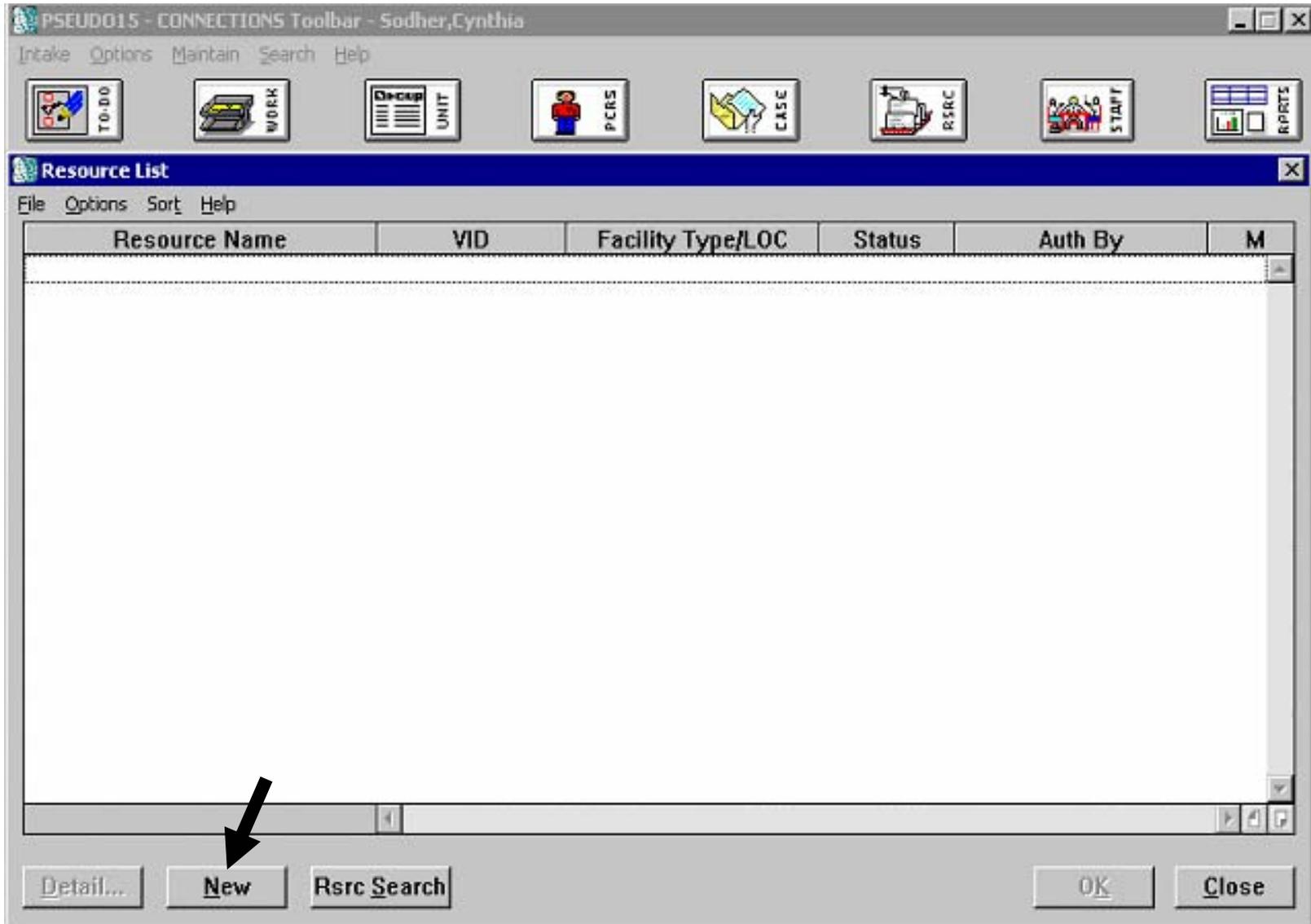
In **'Resource Name'** area type in Name of Resource.

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'.**

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

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

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

and any other fields that apply.

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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"

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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**'.

Click on '**Ok**' the 'Resource Detail' window will reopen.

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Click on 'Phone' button.

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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.
Click on '**Add**' button.
Click on '**Ok**' button .

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

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Dialogue box will appear and ask "Navigating to SVC by Area requires saving Resource Detail Data. Save?". Click on '**Yes'.**

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'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'.**

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Click on **'Save'.**

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

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