



# CONNECTIONS Tip Sheet

## Resources: Adding a Non-FAD Provider


revised July 2021

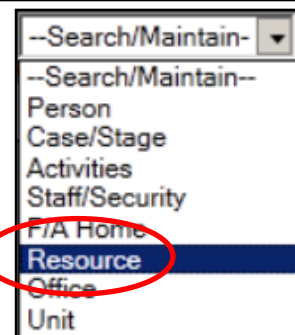
The CONNECTIONS Resource Directory contains information about agencies, facilities, providers, helplines, law enforcement agencies and schools throughout New York State. Entities such as foster homes, service providers, stores and other vendors are added in order to write Purchase of Services (POS) lines in the Welfare Management System (WMS) and to create the commodity codes needed in the Benefits Issuance and Control System (BICS) to both pay for services and to correctly and efficiently categorize purchases so that the maximum amount of federal reimbursement for services purchased can be claimed.

Foster and Adoptive (FAD) homes and Supervised Independent Living Programs (SILPs), which are entered in the Resource Directory through the process of creating a foster care setting, are not covered by this tip sheet. This tip sheet is for staff responsible for entering all other, non-FAD, resources in the Resource Directory.

### The CONNECTIONS Resource Directory

All CONNECTIONS users have view access to the Resource Directory through the **Resource** link on the **Search/Maintain** menu.

 **Only district or OCFS staff assigned the Maintain Resources business function can add non-FAD providers to the Resource Directory.**



The Resource Directory contains several different types of resources, as noted in the chart below:

Type	Description	Can be Added By
<b>Agency:</b>	A Local Department of Social Services (LDSS) or voluntary agency (VA).	OCFS
<b>Facility:</b>	A location that provides professional child welfare services: <ul style="list-style-type: none"> <li>Foster and Adoptive homes</li> </ul>	LDSS or VA for foster homes they certify/license
	<ul style="list-style-type: none"> <li>Supervised Independent Living Programs (SILPs)</li> </ul>	Voluntary Agencies
	<ul style="list-style-type: none"> <li>OCFS congregate care facilities, such as institutions and group homes</li> <li>OCFS, OMH and OMRDD facilities</li> <li>OCFS preventive</li> </ul>	OCFS

Type	Description	Can be Added By
<b>Provider:</b>	<p>An organization or individual that provides services for the local district. For example:</p> <ul style="list-style-type: none"> <li>• Day care</li> <li>• Housing (Preventive)</li> <li>• Foster care</li> <li>• Adoption</li> <li>• Stores</li> <li>• Legal services</li> </ul>	<p>LDSS</p> <p>OCFS (for Preventive programs)</p>
<b>Hotline/Helpline and Law Enforcement:</b>	The Hotline/Helpline and Law Enforcement Resource Types are functional, but may not always be consistently maintained in every local district.	LDSS
<b>School</b>	Includes both public and private schools.	OCFS, LDSS

**Vendor IDs and Provider Resources**

Each district must enter their **own** providers in the Resource Directory, with their **own** Vendor ID, in order to pay for the services/goods they wish to purchase. Even if more than one district wishes to purchase services/goods from the **same** provider, each district will need to enter that provider in the Resource Directory with a unique Vendor ID, for their own district's use. Thus, there are multiple listings in the Resource Directory that look similar:

Resource Name	VID	Resource ID ▲	Facility Type/LOC	Status	Auth By	Main
K-Mart	123644	131366		Active		A06
K-Mart Corp. 7065	0850	131775		Active		A07
K Mart Dept Store		132836		Inactive		A09
Kmart	D765	133358		Active		A11
Kmart	KMART	133829		Active		A12
Kmart	KMART2	134070		Active		A12

Once a provider has been entered for a particular district, the same Vendor ID may then be used for a variety of purchase types. These are entered in the Services by Areas tab for that provider.

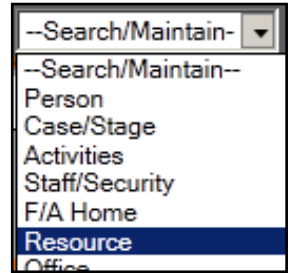
Category	Service	C	County	P	INC	State
Foster Care	School Expenses		DELAWARE			NY
Foster Care	Initial Clothing		DELAWARE			NY
Foster Care	Special Attire		DELAWARE			NY

## Step-by-Step: Recording a New Non-FAD Provider Resource

1. Select **Resource** from the **Search/Maintain** drop-down menu.

*The Resource Search window displays with Phonetic Name as the default Search Type.*

When trying to locate a known resource, it is also possible to search by Phonetic Address or by an Exact/Directory Search such as a Resource ID, Vendor ID or Case ID.



2. Enter the name of the provider/resource you want to add in the **Resource Name** field.

The screenshot shows the 'Resource Search Criteria' form. The 'Search Type' is set to 'Phonetic Name'. The 'Resource Name' field is highlighted with a red circle. A dropdown menu is open below the 'Phonetic Name' field, showing options: Phonetic Name (selected), Phonetic Address, and Exact/Directory. Other fields include Resource Type, Facility Type/LOC, Services, Area Served/Location, and Identifiers.

3. Click the **Search** button.

*The Resource Search List displays with search results (if any).*

The screenshot shows the 'Resource Search List' table. At the bottom of the table, the message 'No match found for the criteria entered' is displayed and circled in red.

If no results match the search criteria, the message "No match found for the criteria entered." displays at the bottom of the Resource Search List. Continue with step 5.

4. Review the search results carefully, scrolling as necessary, to verify that the provider/resource you need is not already entered **for your district** in CONNECTIONS.

Resource Name	VID	Resource ID	Facility Type/LOC	Status	Auth B	Maintainer
Walmart	WALMARTV	20171954		Active		A12
Wal Mart	07897	20081593		Active		A30
Walmart	9999250	20065364		Active		A18
Wal-Mart	5938	20063932		Active		A48
Walmart	20055970	20055970		Active		A29

If your search returns many results, enter your district code in the filter bar for the Maintainer column to easily find your district's entries.

The screenshot shows the 'Detail' tab of the Resource form. The 'Legal Name' field contains 'WALMART' and the 'Resource Name' field contains 'Walmart'. A padlock icon is visible next to the 'Detail' tab.

You cannot use a provider entered by another district. If you select one, both the Detail tab and the Services by Area tab will display with a padlock icon, indicating the windows are view-only.

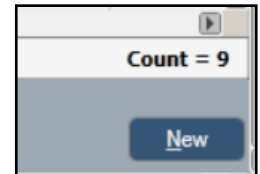
If a record already exists for a provider with your district, **DO NOT** add a new provider. Refer to the section on page 6 of this tip sheet on entering a new Service by Area.

**Be sure to search thoroughly as CONNECTIONS will not prevent you from creating a duplicate of a resource already listed in the database for your district.**

Resource Name	VID	Resource ID	Facility Type/LOC	Status	Auth By	Maintainer
Walmart-2581		21089503		Active		A31
Walmart-2581	017162	20110353		Active		A31
Wal-Mart Stores	009453	143832		Inactive		A31
Wal-Mart Community Brc	016244	20084727		Inactive		A31

5. If the resource does not already exist, click the **New** button to the lower right of the search results grid..

*The Resource Detail tab opens.*



6. Complete the following required fields:

- **Legal Name** - Enter the full legal name of the resource
- **Resource Name** - Enter the resource's name,
- **Resource Type** - Select "Provider" from the Resource Type drop-down menu.
- **Resource Status** - Select "Active" from the Resource Status drop-down menu.
- **Primary Address** - Enter the street and city. Click the **Validate** button. The system will supply the county and zip code. Click the **Accept** button if the address is correct.
- **Primary Phone** - enter the area code and phone number



**Note:** All fields with a red asterisk (\*) require completion in order for the **Save & Close** and **Save** buttons to enable.

7. Enter additional information as desired.

*In order to enable the Tax ID field, a selection must first be made from the 1099 Status drop-down menu.*

8. Click the **Save** button to continue adding information or **Save & Close** button to exit the window entirely.

*Additional information can now be entered in the Resource Tabs.*

The screenshot shows a software interface with a tabbed menu at the top: **Detail**, Address, Phone, Services by Area, Relationships. The **Detail** tab is selected. Below the tabs are several input fields:

- Legal Name: [text input] \*
- Resource Name: [text input] \*
- Resource Type: [dropdown menu] \*
- Resource ID: [text input]
- Agency ID: [text input]
- Maintainer: **AST**

A red bracket is drawn above the tabs, and red asterisks are placed to the right of the Legal Name, Resource Name, and Resource Type fields.

## Address Tab

The address already entered on the Detail tab will display as Primary. There can be only one Primary address. There must also be a designated Business Address, which is the address to which the VID is attached and payments are sent. It may be the same or different from the Primary address.

### To add an additional address:

1. Use the **Type** drop-down menu to select the kind of address to be added.
2. Enter the street and city.
3. Click the **Validate** button. The system will supply the county and zip code.
4. Click the **Accept** button on the validation pop-up window if the address is correct.
5. Click the **Add** button.

Type	Vendor ID	Street	PO Box/Apt #	Attn	City	State	Zip	County	CD	Sch Dist Name
Primary		3657 W GENESEE ST			CAMILLUS	NY	13031	ONONDAGA		
Business	987654	3657 W GENESEE ST			CAMILLUS	NY	13031	ONONDAGA		

*The entered address now displays in the grid.*

6. Repeat steps 1 - 5 to enter any additional addresses needed.
7. When all addresses have been entered, click the **Save** button to continue adding Resource information or **Save & Close** button to exit the window entirely.

## Phone tab

The phone number already entered on the Detail tab will display as Primary. There can be only one Primary phone number.

### To add additional phone numbers:

1. Use the **Phone Type** drop-down menu to select the kind of phone number to be added.

Phone Type	Phone	Ext	Phone Comments
Primary	(315) 233-0600		

- In the **Number** field, enter the phone number, including the area code. Complete any additional fields, if needed.
- Click the **Add** button.  
*The entered phone number now displays in the grid.*
- Repeat steps 1 - 3 to enter any additional phone numbers needed.
- When all phone numbers have been entered, click the **Save** button to continue adding Resource information or **Save & Close** button to exit the window entirely.

## **Services by Area**

This tab is used to record the specific type of service(s) a district is purchasing from a Provider. Each district must enter their own provider even if other districts use the same one since each district's Vendor ID must be associated to the provider for payment purposes..(e.g., two districts may wish to issue payments to the same day care center, but each must enter the day care as a provider for their own district.). Multiple districts can use the same FAD resource if it was entered by OCFS (e.g., congregate care facilities.)

It is important to select the correct Category and Service choices so the correct commodity code is transmitted to your districts BICS file. An incorrect code will result in a BICS error when you add the Purchase of Services (POS) line in WMS.

### **To add a Service:**

- Use the **Category** drop-down menu to select the category of the service being added.

*The Service field enables.*

- The **State** field defaults to "NY". If entering an out of state provider, use the drop-down menu to select the correct state.

- Use the **Services** drop-down menu to select the specific service being added.

- Select a county from the **County** drop-down menu.
- Click the **Add** button.

*The entered service and county now display in the grid.*

- Repeat steps 1 - 5 to enter additional services.

Category	Service	C	County	P	INC	State
Day Care	Day Care-Center-FT		ONONDAGA			NY

Count = 1

**Service Detail** Population

Category: \*

State: \*

County: \*

Service: \*

All Counties

Partial Counties

Income Based

Add Modify Delete Clear

Save & Close Save Reset

- When all services have been entered, click the **Save** button to continue adding Resource information or **Save & Close** button to exit the window entirely.

## Relationships



This tab is only used by **OCFS staff** when entering Preventive service providers such as community residences. **All other Non-OCFS staff can ignore this tab.**

### To add a Relationship:

- In the **Rsrc ID** field, enter the Resource ID number.

Resource Name	Link Type	Facility Type/LOC	F/A Home Status	Setting	Service	Resource ID
Child And Family Services	V. Agency/Facility	Preventive				1955
Child Fam Svcs Conners Rtf	V. Agency/Facility	Residential Treat Fac				3535
Child Fam Lee Randall Jones Res	V. Agency/Facility	Vol Comm Residence				2061705

- Select the correct relationship from the Link Type drop-down menu.
- Select the correct service from the **Service** drop-down menu
- Click the **Add** button
- Click the **Save** button to continue adding Relationship information or **Save & Close** button to exit the window entirely.

## Resources

- CONNECTIONS Job Aids and Tip Sheets: <http://ocfs.state.nyenet/connect/jobaides/jobaides.asp>
- CONNECTIONS Regional Implementation Staff: <http://ocfs.state.nyenet/connect/contact.asp>
- CONNECTIONS Application Help Mailbox: [ocfs.sm.conn\\_app@ocfs.state.ny.us](mailto:ocfs.sm.conn_app@ocfs.state.ny.us)

(NOTE: address contains an underline)

A Helpdesk ticket is now required before sending requests to the Triage Unit. This can be acquired by emailing **FixIt@its.ny.gov**.

ITS Enterprise Service Desk  
1-844-891-1786