

How to Find and View Provider Records

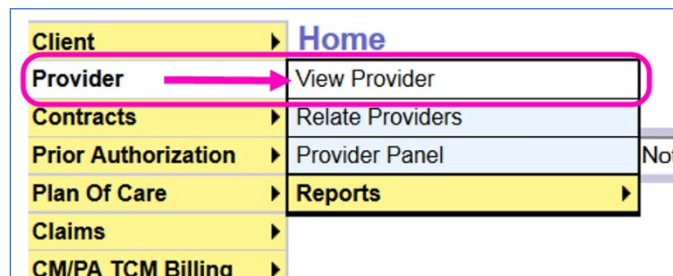
Case Management Entity (CME) may need to search eXPRS to find provider records, such as when trying to determine if a PSW has active credentials or adding an agency provider's Service Location to their Provider Panel.

A CME user will need one of the following roles associated with their CME to view provider records:

- **Provider Viewer**
- **Provider Panel Manager**

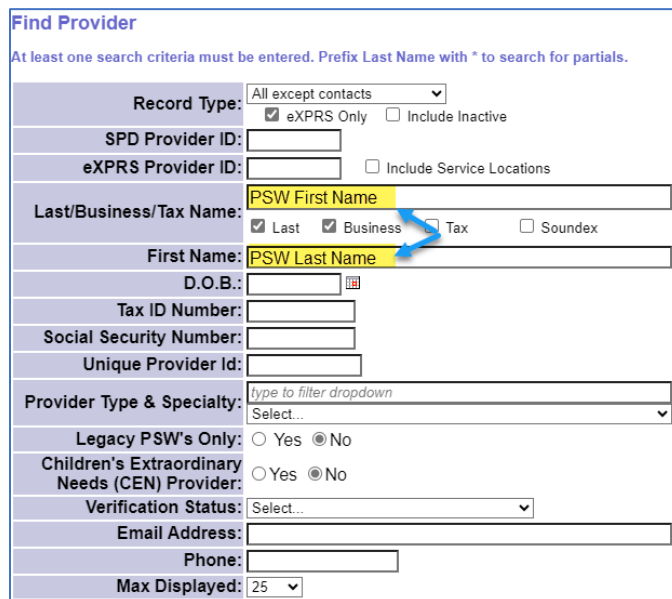
How to Find and View PSW Provider Records:

1) Login to eXPRS¹ and Select **Provider > View Provider**



Client	Home
Provider	View Provider
Contracts	Relate Providers
Prior Authorization	Provider Panel
Plan Of Care	Reports
Claims	
CM/PA TCM Billing	

2) On the **Find Provider** page, enter at least one search criteria (e.g. Names, IDs etc.) and select **Find**.



Find Provider
At least one search criteria must be entered. Prefix Last Name with * to search for partials.

Record Type:	All except contacts <input checked="" type="checkbox"/> eXPRS Only <input type="checkbox"/> Include Inactive
SPD Provider ID:	<input type="text"/>
eXPRS Provider ID:	<input type="text"/> <input type="checkbox"/> Include Service Locations
Last/Business/Tax Name:	PSW First Name <input checked="" type="checkbox"/> Last <input checked="" type="checkbox"/> Business <input type="checkbox"/> Tax <input type="checkbox"/> Soundex
First Name:	PSW Last Name
D.O.B.:	<input type="text"/>
Tax ID Number:	<input type="text"/>
Social Security Number:	<input type="text"/>
Unique Provider Id:	<input type="text"/>
Provider Type & Specialty:	type to filter dropdown Select...
Legacy PSW's Only:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Children's Extraordinary Needs (CEN) Provider:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Verification Status:	Select...
Email Address:	<input type="text"/>
Phone:	<input type="text"/>
Max Displayed:	25

¹ If users have multiple login options, use the Local Authority (for CDDPs), Contractor (for Brokerage), or State for (State Kids)

TIP: Some common tips when searching are to use the **Provider Type & Specialty** field to search by a specific Provider Type & Specialty. For example, enter a name in the Last/Business/Tax Name field and then add a Provider Type & Specialty by highlighting the appropriate option from the dropdown. The results list will only include providers that match those two criteria.

Find Provider
 At least one search criteria must be entered. Prefix Last Name with * to search for partials.

Record Type: All except contacts
 eXPRS Only Include Inactive

SPD Provider ID:

eXPRS Provider ID: Include Service Locations

Last/Business/Tax Name:
 Last Business Tax Soundex

First Name: *Community

D.O.B.:

Provider Type & Specialty: 87-732
 Select...
 DD Employment & Inclusion
 87-732 DD Facility Based Employment

Additionally, you can use an asterisk (*) as the first character in the **Last/Business/Tax Name** field to search for records where the name following the asterisk appears anywhere in the name. For example, searching by “community” will only return records with names that start with the word “community”. However, searching by “*community”, will return records that contain the word “community” anywhere in the record name.

Find Provider
 At least one search criteria must be entered. Prefix Last Name with * to search for partials.

Record Type: All except contacts
 eXPRS Only Include Inactive

SPD Provider ID:

eXPRS Provider ID: Include Service Locations

Last/Business/Tax Name: *Community
 Last Business Tax Soundex

First Name:

D.O.B.:

- 3) From the results list, select the **Display Name** hyperlink to view a provider record. Remember that some providers have multiple records with different “types”, so select correct record.

Type	eXPRS Prov ID	SPD Prov ID	Display Name	Prov Type & Specialty	Verification	Beds	Program Start	Program End
Service Location			Work EMP SE54 ALL	DD Employment & Inclusion - DD Community Inclusion Services	OMAP Number Issued		7/1/2020	12/31/2021
Service Location			Employment SE56	DD Allotment - DD Rent Subsidy	OMAP Number Issued		6/1/2021	12/31/2021

Agency Provider

eXPRS Prov ID	SPD Prov ID	Display Name	Prov Type & Specialty	Verification
5****0	7****5	PSW Last, First name (same as below)	Personal Support Worker - In-Home Personal Care Attendant CILS	
5****4	7****3	PSW Last, First name (same as above)	Personal Support Worker - DD Personal Support Worker	

PSW

TIP: Right-click the link to open it in a new tab or window. This allows users to view results without losing the search result list.

- 4) On the **View Provider** page, expand the subsections to view more information on the provider record. See **Appendix A** for more information.

View Provider

Provider ID: 7****9

Record Type: Provider

Business Type: Individual

Tax Name: PSW Last, First

Personal Name: PSW Last, First

Date of Birth: mm/dd/yyyy

- ▶ **Contact Information**
- ▶ **PSW Weekly Hours/Rates**
- ▶ **Specialties**
- ▶ **Credentials**
- ▶ **Relationships**
- ▶ **Employment Relationship**

Click on each header to expand & view information in that section.

Appendix A: View Provider Section Overview

The information below describes all the sections found on the Provider Page. However, not all sections display for each provider type. Additionally, some sections are restricted by User Permissions.

- **Contact Information** – Contains contact information (address, phone, etc.).

▼ **Contact Information**

▼ **Addresses**

Pay To:	
Corporate Office:	123 Any Street
Physical:	City, OR 97***
Home Office:	County
Medical Records:	
Mail To:	

▼ **Phones**

Phone:	(541) ***-*****
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▼ **Emails**

Primary Email:	emailaddress@email.xxx
Secondary Email:	

- **PSW Weekly Hours/Rates** – The weekly hours cap total that the PSW is approved to work in a work week (Sun – Sat). This is informational only. There are no billing validations connected with this information at this time.

▼ PSW Weekly Hours/Rates						
Weekly Hours	Client Prime	Start	End	Exception Reason	Entered By User	Per CME

- **EVV Exceptions** – Any exceptions that the client has to using EVV. The staff that created the exception, when it was updated, start/end dates and other information specific to the exception will display.

▼ EVV Exceptions						
Created	Updated	ODDS Approval	Start	End	Client	Level

- **Specialties** – The Provider Type & Specialties associated with this record.

▼ **Specialties**

Provider Type: 84 Personal Support Worker

Provider Specialties: 84-803 DD Personal Support Worker
1/1/1900 — 12/31/9999

TIP: Provider Types & Specialties are formatted as ##-####. The first 2 digits designates the Provider Type. The next 3 digits designate the provider’s Specialty (e.g. the DD PSW Personal Support Worker number is 84-803).

- 5) **Credentials** – Criminal History Check (CHC) dates, Provider Enrollment Application and Agreement (PEAA) dates, Training Requirements, Provider Type and Specialty Status, and the active/effective dates of that specialty.

▼ **Credentials**

SPD Provider ID: 7****6

Application Date: 9/15/2014

Verification: OMAP Number Issued on 6/10/2016

IRS Verified: Pass on 6/10/2016

OIG Verified: Pass on 6/10/2016

SAM Verified: Pass on 6/10/2016

DMF Verified: Pass on 6/10/2016

ACA validation check information is here.

▼ **Criminal History**

Type	Start Date	End Date
Child	5/13/2016	5/31/2018
Child	6/27/2014	6/30/2016

▼ **Enrollment Agreements**

Start Date	End Date
5/21/2016	5/31/2018
9/15/2014	9/30/2016

▼ **Program - SPDST - SPD DD Provider**

Enrollment Status	Program	Start Date	End Date
Active	Active	9/15/2014	12/31/9999

View the dates the provider is approved to work as a PSW here.

803 - DD Personal Support Worker

Type	Status	Start	End
▶ Personal Support Worker, DD	Approved To Work	7/1/2016	5/31/2018
▶ Personal Support Worker, DD	Approved To Work	9/15/2014	6/30/2016

Shown above, this provider is “**approved to work**” as an **803 – DD Personal Support Worker** from 7/1/2016 to 5/31/2018.

TIP: Reading this section can be complicated. Information on each specialty a provider has will be listed under the **Program** subsection.

- **Payment Information** – A section containing subsections for the PSW’s **Steps** (including Legacy Provider information), **Union Membership History** and **Share Payroll History**

▼ **Payment Information**

▼ **Steps**

Legacy Provider: Yes No

Step	Base Rate	Rate Effective Date	Rate End Date	Hours Worked From	Hours Worked To	Calculation Date	Calculated Hours	Implemented Hours	Notes	Status
4	23.00	1/1/2025	12/31/9999	1/1/2023	6/30/2024	07/10/2024 01:06 PM PDT	3000.000	6000.000	Legacy Step Integration	Accepted
4	22.50	7/1/2024	12/31/2024	1/1/2023	6/30/2024	07/10/2024 01:06 PM PDT	3000.000	6000.000	Legacy Step Integration	Accepted

▶ **Union Membership History**

▶ **Share Payroll History**

For more details, see the guide: **How eXPRS Assigns and Displays a PSW’s Pay Step, and How PSW Fixed Rates and Differentials Work.**

- **Relationships** – A section containing other subsections including **Employment Relationships**, **Provider Panel Member**, and **Parent Information**.

▼ **Relationships**

▼ **Employment Relationships**

▼ **Provider Panel Member**

Export options: [CSV](#) | [Excel](#) | [PDF](#) | [RTF](#)

SPD ID	eXPRS ID	Provider	Provider Specialty	Start Date	End Date
				7/1/2014	12/31/9999
				5/8/2014	12/31/2018
				8/1/2016	3/10/2023
				3/1/2015	12/31/9999
				8/4/2014	9/29/2017
				5/4/2015	12/31/9999

No child relationships found to display

- **Review** – A section used to indicate whether or not an Agency Provider’s Service Delivered Billings must be reviewed prior to approval.

▼ **Review**

Provider Billing Review: Yes No

Notes

- **Employment Relationship** - Lists the I/DD individuals that this PSW has an employment relationship association with, for the purposes of facilitating payment to the PSW from the FMAS payroll vendor.

▼ **Employment Relationship**

Client Prime	Client Name	Expires	Payment Provider
aaa0000a	A: First Last	12/31/2016	TNT Fiscal Intermediary Services Inc
bbb1111b	B: First Last	12/31/2016	TNT Fiscal Intermediary Services Inc
aaa0000a	A: First Last		Public Partnerships LLC FMAS
bbb1111b	B: First Last		Public Partnerships LLC FMAS
ccc2222c	C: First Last	3/31/2017	Public Partnerships LLC FMAS

- **Client Prime:** The prime number for the I/DD individual whose employer has a confirmed relationship association with the PSW.
- **Client Name:** The name of the I/DD individual whose employer has a confirmed relationship association with the PSW.
- **Expires:** The date the association relationship enrollment with the listed FMAS payroll vendor expires or ends. For example, if the **Expires** date is 3/31/2017, that relationship was valid as part of the payment contingency period. If the field is blank or no date is listed, that association/payroll vendor enrollment is current and ongoing.
- **Payment Provider:** The name of the FMAS payroll vendor that issues payment to the PSWs for dates of that vendor's enrollment.

Appendix B: PSW Provider Types/Specialty Code List

A PSW may have a single record with multiple PSW specialties within in it, or have separate records/numbers.

Provider Type/Specialty Number	Official Provider Type/Specialty Name	Common Name
84-800	Personal Support Worker – In-Home Personal Care Attendant DD	DD SPPC/PC20 PSW
84-801	Personal Support Worker – In-Home Personal Care Attendant CIIS	CIIS PSW
84-803	Personal Support Worker – DD Personal Support Worker	DD PSW or DE PSW
84-806	Personal Support Worker - DD PSW Enhanced Skills	DD PSW Enhanced Skills
84-807	Personal Support Worker - DD PSW Exceptional Skills	DD PSW Exceptional Skills
84-818	Personal Support Worker - DD PSW Differential	DD PSW Differential
84-809	Personal Support Worker - DD PSW Employment Job Coach	DD PSW Employment Job Coach

Appendix C: Common Provider Types & Specialties for Agency Providers (not an exhaustive list)

Provider Type/Specialty Number	Common Service Type Name
87-732	DD Facility Based Employment
87-733	DD Non-Facility Employment Crew/Enclave
87-735	DD Supported Employment
87-738	DD Community Inclusion Services
89-819	DD Community Living Supports (CLS) - Employer Agency
89-821	DD Community Living Supports (CLS) - Standard Agency
89-835	Supported Living DD
89-825	Residential Care DD Adult GH
89-826	Residential Care DD Child GH
70-701	Foster Care – Adult DD
71-703	Foster Care – Child DCR
71-704	Foster Care – Child DCW
93-710	DD Agency Behavior Consultant

72-717	DD Non-Medical Transportation – DD Provider Agency/Org
70-837	Adult FC Respite/Relief Care Svcs
71-837	Child FC Respite/Relief Care Svcs
78-725	DD Service – APD Adult Day Service Provider
78-930	DD Service – APD In-Home Care Agency Provider
93-943	DD Comprehensive Service Agency

Note that agency providers may have an overall Agency record for the entire organization (a.k.a. the parent record) and Service Location records (a.k.a. the child records).

Appendix D: Provider Search Result Set Definitions

From the result list, view the basic information available. Each column identified in the screenshot is defined in **Appendix C**.

1 Type	2 eXPRS Prov ID	3 SPD Prov ID	4 Display Name	5 Prov Type & Specialty	Verification	Beds	Program Start	Program End	Program Status	Primary Email
Provider				Personal Support Worker - DD Personal Support Worker	OMAP Number Issued	0	4/17/2019	12/31/9999	A	
Provider				Personal Support Worker - DD Personal Support Worker	OMAP Number Issued	0	7/31/2013	12/31/9999	A	

- 1) **TYPE** - The Provider Record Type.
- 2) **eXPRS Prov ID** - The Provider Record’s eXPRS ID number. For PSW records, this number is informational to the system only; it is the provider’s “official” provider number.
- 3) **SPD Prov ID** – The Provider Record’s credentialed provider number. It is the number used for provider authorization and billing/claims activity in eXPRS. If this column is blank, the provider record has a preliminary provider record in the database, but the record has not been activated and an SPD provider ID number has not yet been assigned.
- 4) **Display Name** - The Provider Record’s name. This will be displayed on authorizations, billings and claims in eXPRS. This is often the provider’s official tax name.

- 5) **Prov Type & Specialty** – The Provider Record’s primary Provider Type and Specialty. Provider Records can have multiple specialties. Open the record to determine if the provider has multiple specialties, and if they have the specialty needed.

Appendix E: Search Criteria Definitions

Find Provider

At least one search criteria must be entered. Prefix Last Name with * to search for partials.

Record Type:	All except contacts <input checked="" type="checkbox"/> eXPRS Only <input type="checkbox"/> Include Inactive
SPD Provider ID:	<input type="text"/>
eXPRS Provider ID:	<input type="text"/> <input type="checkbox"/> Include Service Locations
Last/Business/Tax Name:	<input type="text"/> <input checked="" type="checkbox"/> Last <input checked="" type="checkbox"/> Business <input type="checkbox"/> Tax <input type="checkbox"/> Soundex
First Name:	<input type="text"/>
D.O.B.:	<input type="text"/>
Tax ID Number:	<input type="text"/>
Social Security Number:	<input type="text"/>
Unique Provider ID:	<input type="text"/>
Provider Type & Specialty:	type to filter dropdown Select...
Legacy PSW's Only:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Children's Extraordinary Needs (CEN) Provider:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Verification Status:	Select...
Email Address:	<input type="text"/>
Phone:	<input type="text"/>
Max Displayed:	25

- **Record Type:** Limits the results based on the type of provider selected.
- **eXPRS Only:** Limits results to only eXPRS Records when checked.
- **Include Inactive:** Includes inactive providers in the results list when checked.
- **SPD Provider ID:** Limits the results to only the SPD Provider ID entered.
- **eXPRS Provider ID:** Limits the results to only the eXPRS Provider ID entered.
- **Last/Business/Tax Name and Associated Checkboxes:** Limits the results to only those that match the name entered. Checkboxes are available to include those fields in the search.
- **First Name:** Limits the results to only those that match the name entered.
- **D.O.B.:** Limits the results to only those that match the date of birth entered.
- **Tax ID Number:** Limits the results to only those that match the Tax ID entered.
- **Social Security Number:** Limits the results to only those that match the Social Security Number entered.
- **Unique Provider ID:** Limits the results to only those that match the Unique Provider ID Number entered.
- **Provider Type and Specialty:** Limits the Results to only those that match the Provider Type and Speciality entered.
- **Legacy PSW's Only:** Limits the results to Legacy PSWs only.

- **Children’s Extraordinary Needs (CEN) Provider:** Limits the results to Legacy PSWs only.
- **Verification Status:** Limits the results to those with the verification status selected in the dropdown.
- **Email Address:** Limits the results to only those that match the email address entered.
- **Phone:** Limits the results to only those that match the phone number entered.
- **Max Displayed:** Controls how many results display on a single page.