

## How to Update or Remove an Entry on a Case Management Entity's Provider Panel

It is important for Case Management Entity (CME) staff to manage their Provider Panel. By updating and removing provider records from the Provider Panel, the Plan of Care Provider dropdown will be easier to use.

When managing the Provider Panel, ***NEVER*** select the **Terminate** button on an entry. This completely disables the provider from being used on your panel and from entering valid SD billing entries, even for dates valid on SPAs in the past.

**Update Provider Panel Members**

**Provider ID:**  
**Record Type:** Organization  
**Business Type:** Corporation  
**Business Name:** CME ONE  
 ▶ **Historical**  
**Tax Name:**

▼ **Provider Panel Members**

SPD ID	eXPRS ID	Provider	Provider Specialty	Start Date	End Date	Termination
101			DD Comprehensive Service Agency	7/1/2018	12/31/9999	<input type="button" value="Terminate"/> <input type="button" value="Remove"/>
795			DD Personal Support Worker	6/19/2017	12/31/9999	<input type="button" value="Edit"/>

To update or remove an entry on the Provider Panel, a CME user must have one of the following eXPRS user roles:

- **Local Auth Provider Panel Manager** (for CDDPs)
- **Brokerage Provider Panel Manager** (for Brokerages)
- **State Kids Services Panel Manager** (CIIS/State Kids Res)

To Update/Remove a provider record on your POC Provider Panel:

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

The image shows three sequential screenshots of a login form. Each form has fields for 'Login Name' (containing 'userID'), 'Password' (masked with dots), and 'Organization/Program Area'. In the first screenshot, the dropdown menu is set to 'County (Local Authority)'. In the second, it is 'Brokerage (Contractor)'. In the third, it is 'State Kids (State)'. A red arrow in each screenshot points to the dropdown arrow.

- 2) Select **Provider > Provider Panel**.

A screenshot of a navigation menu with the following items: Client, Home, Provider, View Provider, Contracts, Relate Providers, Prior Authorization, Provider Panel, Plan Of Care, Reports. The 'Provider' and 'Provider Panel' items are highlighted with a pink box. A red arrow points from the 'Provider' item to the 'Provider Panel' item.

- 3) On the **Provider Panel Members** page, click the **Edit Provider Panel** button.

A screenshot of a table with the following data:

****	****	Provider Name	Transportation	1/1/2018	
****	****	Provider Name	Foster Care - Adult DD	1/1/2018	12/31/9999
****	****	Provider Name	DD Personal Support Worker	12/2/2016	11/30/2018

Below the table are two buttons: 'Edit Provider Panel' and 'View Provider'. A red arrow points to the 'Edit Provider Panel' button.

- 4) On the **Update Provider Panel Members** page, click the **Provider Panel Members** section to see the **Edit** button associated with each entry.

**Update Provider Panel Members**

Provider ID:

Record Type: Organization

Business Type: Corporation

Business Name: CME ONE

Tax Name:

Historical

▼ **Provider Panel Members**

SPD ID	eXPRS ID	Provider	Provider Specialty	Start Date	End Date	Termination	
10	656		DD Comprehensive Service Agency	7/1/2018	12/31/9999		Edit
79	126		DD Personal Support Worker	6/19/2017	12/31/9999		Edit
80	187		DD Personal Support Worker	2/9/2017	3/31/2018		Edit
76	674		DD Personal Support Worker	10/1/2016	11/30/2017		Edit

- 5) Select the **Edit** button to open a specific entry and modify either the Start/End Date or **Remove** it.

**Update Provider Panel Members**

Provider ID:

Record Type: Organization

Business Type: Corporation

Business Name: CME ONE

Tax Name:

Historical

▼ **Provider Panel Members**

SPD ID	eXPRS ID	Provider	Provider Specialty	Start Date	End Date	Termination	
101			DD Comprehensive Service Agency	7/1/2018	12/31/9999		Terminate Remove
795			DD Personal Support Worker	6/19/2017	12/31/9999		Edit

**TIP:** It is best practice to enter an end date rather than select the **Remove** button for provider panel entries. See **Appendix A** below for more details.

- 6) Make any other necessary updates, and then select the **Save Panel Members** button to save the changes.

7****3	5****6	Provider Name 74	DD Support Worker	7/1/2021	12/31/9999	Edit
8****1	2****3	Provider Name 75	DD Personal Support Worker	7/1/2021	12/31/9999	Edit

**New Provider Panel Member (Enter Provider ID or Search)**

SPD Provider ID:

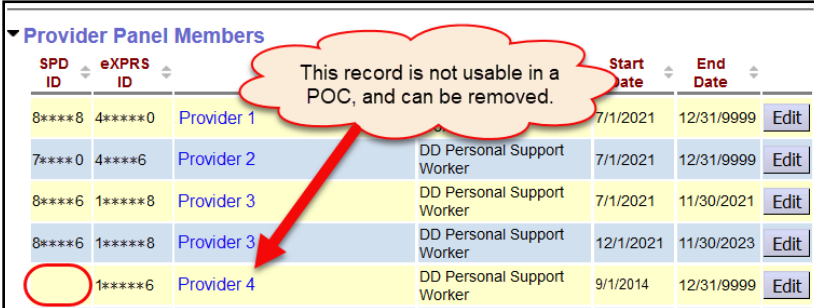
Provider Name:

Dates:  —

**Save Panel Members** **View Provider Panel**

## APPENDIX A: Reminders for Updating or Removing Entries on a Panel

- **DO NOT** remove a provider from the panel if they have ever been used on an **Accepted** SPA created by the CME. If they are removed, the provider cannot successfully bill for dates they provided services.
  - E.g. - A CME may try to 'clean up' their Provider Panel by removing a PSW who no longer works for an individual. However, if the PSW has valid SPAs and they are removed from the panel, there can be unexpected errors that:
    - Prevent updates to valid SPA(s) for the PSW (e.g. rate changes)
    - Prevent the PSW from billing successfully for valid dates worked
    - Prevent the PSW from being authorized/billing for other individuals they may still be working with for the CME.
- Providers on your panel that do not have an **SPD ID** number can be removed; they are not credentialed providers and cannot be used in eXPRS POC.



The screenshot shows a table titled "Provider Panel Members" with columns for SPD ID, eXPRS ID, Provider Name, Role, Start Date, End Date, and an Edit button. A red callout box with a cloud-like border points to the "SPD ID" field of the record for "Provider 4". The callout text reads: "This record is not usable in a POC, and can be removed." The "SPD ID" field for "Provider 4" is circled in red.

SPD ID	eXPRS ID	Provider	Role	Start Date	End Date	Edit
8****8	4****0	Provider 1		7/1/2021	12/31/9999	Edit
7****0	4****6	Provider 2	DD Personal Support Worker	7/1/2021	12/31/9999	Edit
8****6	1****8	Provider 3	DD Personal Support Worker	7/1/2021	11/30/2021	Edit
8****6	1****8	Provider 3	DD Personal Support Worker	12/1/2021	11/30/2023	Edit
1****6	1****6	Provider 4	DD Personal Support Worker	9/1/2014	12/31/9999	Edit

- If the same provider record is listed on the panel with overlapping panel date ranges, one of those records should be removed.