

Individual Provider Contracts in the Agency Contracts Database

IP Contracting Process Changes & Best Practices

Changes to Process & Best Practices

This PowerPoint presentation will describe and detail changes to the Individual Provider contracting process, with the release of the Individual ProviderOne (IPOne) system on January 1, 2016.

Changes in the ACD will be made at the same time, to support the new interface between the ACD and IPOne.

Topics in this presentation are:

- **Best Practices**
 - Using the Provider/Contractor Legal Name
 - Search for Provider/Contractors by the Tax ID
 - Owner Records with Dates of Birth and SSN
 - Editing Addresses
- **IP Contracting Process**
 - Create New Contractor
 - Safety & Orientation Check
 - Start New IP Contract
 - Contract Details – End Dates
 - Review Taxonomies
 - Select Dba Name
 - Approve & Sign
 - System Assigns IPOne ID

Best Practice

- Using the Provider/Contractor Legal Name:

It is imperative that we use the legal name the provider has established with the IRS, for reporting and paying taxes. And it's especially important that if the provider is a sole proprietor, they're using their First, Middle and Last names. Many providers get confused about business types, and will try to insist that we use a "Doing Business As" (Dba) name, like *John's Residential Services*. But they may have never actually formed a business, other than their sole proprietorship. And IPs are ***always*** doing business as themselves, under their own legal name.

Best Practice

- Search for Provider/Contractors by the Tax ID:

With so many contractors now in the ACD (well over 175,000), it is common to find people with the similar or even identical names. Please always search using the SSN or EIN. Even though SSNs are masked in the ACD to show the last 4 digits only, the whole SSN is in the ACD and can be searched. Using that 9-digit number for an exact match (without any “dashes”) is the best way to find someone in the ACD. We have many times recently had to fix contracts for people who have written them for the wrong “John Doe” or “Mary Smith.”

Presumably when a contractor comes into an office to renew their contract, they have their SSN card with them, and the entire number can be used to search, preventing these kinds of mistakes.

Best Practice

- Owner Records for Dates of Birth and SSN:

Many people have been putting in extra owner records for sole proprietors, even though the sole proprietor has an automatic Owner/Staff record setup by the ACD. This doesn't solve the issue of having to input Date of Birth and Tax ID for each owner, since the original Owner record is still there and will require the DOB and SSN also. Please just edit the sole proprietor's Owner/Staff record, along with any other additional owners, to put in the DOB and SSN.

Also, for sole proprietors where there is a name change, please do not add another staff record with the new name.

Email the ACD Help Desk (eadhelp@dshs.wa.gov) and we'll update the name for you right away.

Best Practice

If your IP has an address change, DO NOT EDIT OVER THE EXISTING ADDRESS in the ACD. The IP needs to contact Individual ProviderOne themselves to update his or her address. That is critical, as all the IPs demographic records, union info and payments will flow through that system, after the initial contract is done.

After the IP gets their address updated in IPOne, ACD Contract Staff can also update the address in the ACD, but it will be done automatically through the Interface the day after IPOne is updated. But, to update the address in the ACD, follow these steps (DO NOT EDIT OVER THE EXISTING ADDRESS):

Address Updates

- Go to the Contractor Address screen
- Click “New” to add a new address
- Type in the new one, choosing “Default” as the address type
- Save the new address – The ACD will then ask you if you want to use the new address as the new Default, and set the old address to Historic
- Click Yes

That’s it. Then you’ve got the new Default address set, and the old address is still there as Historic.

Start by Searching on ACD Contractor Search

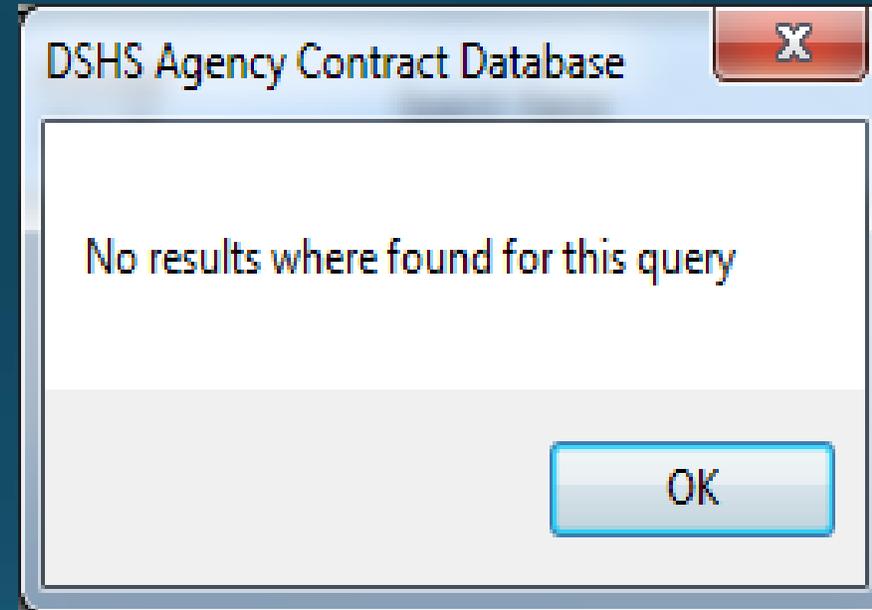
- The preferred method is to use the Tax ID/SSN.
- Searching by name can be done as well, but using SSN ensures finding the correct provider.

The screenshot shows a software window titled "ACD: Contractor" with a menu bar containing "New Contractor", "Save", "Edit", "Cancel", "Delete", "Reports", "Export Data", and "Exit". Below the menu bar are four tabs: "DSHS Index", "DSHS Contractor", "Business Type", and "Contractor Status". The "Contractor Search" section contains several input fields: "DSHS Index" (checkbox), "Tax ID Number" (checkbox, checked), "SSN EIN" (text box with "123456789"), "UBI Number" (checkbox), "Provider One Id" (checkbox), "Search Name" (checkbox), and "Begin" (checkbox). A yellow "Run Query" button is present, along with an "Include Inactive Records" checkbox and a "Total Records (Max: 3500)" display showing "0". Below this is a table with the following columns: "Flags" (sub-columns D, C, A, T), "Status", "Source System", "DSHS Index", "Provider One ID", "Search Name", "Identification", "Business Type", and "UBI Number". The table body is currently empty. At the bottom of the window, it says "Current Database: ACD Production".

Search Results

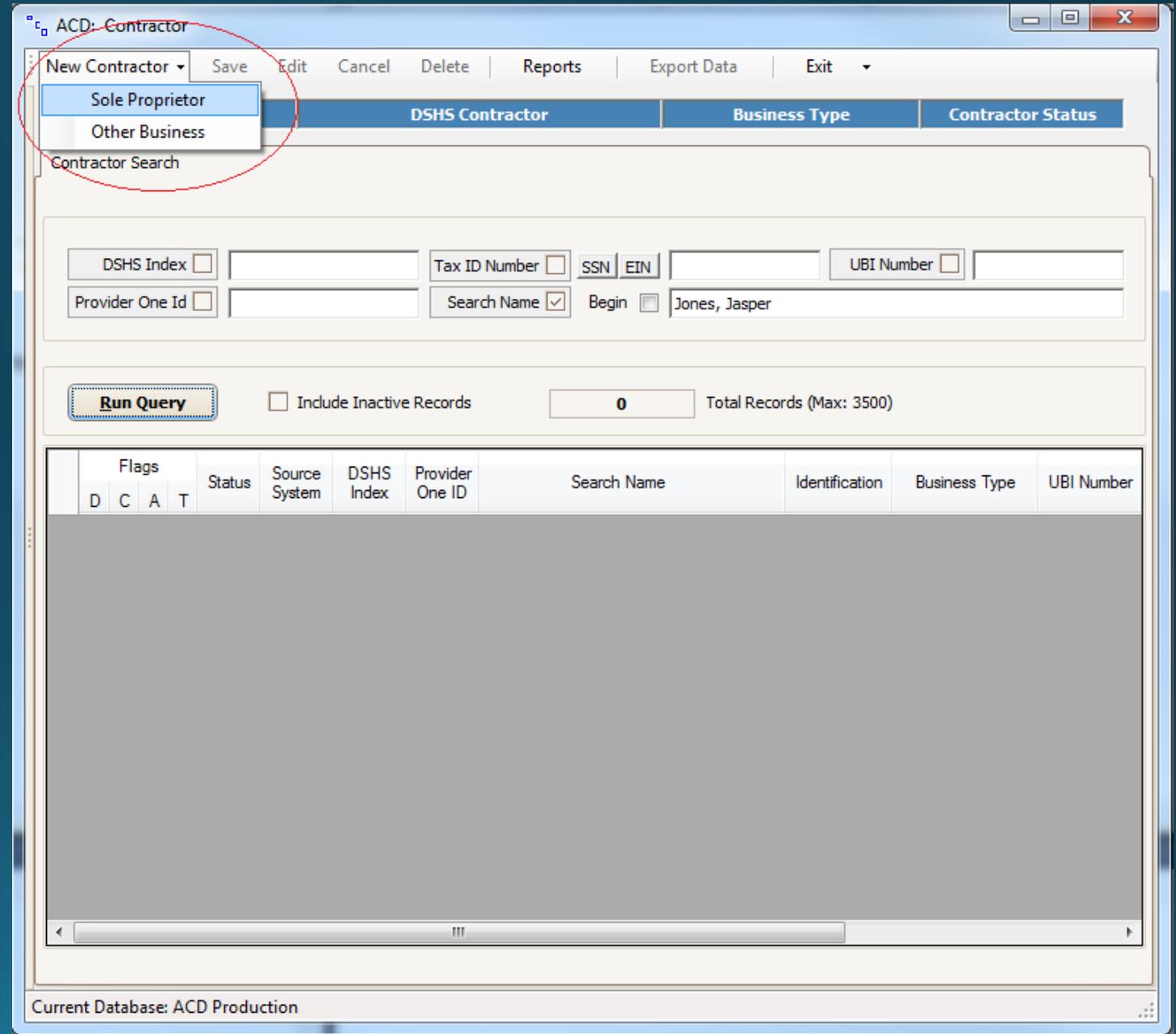
If the contractor is not found, the ACD will tell you that:

Click OK



Create New Contractor

After clicking OK on the Search Results notice, click the New Contractor drop-down, and choose Sole Proprietor:



Complete all fields:

Type in name, SSN, and address, and make sure to select the Preferred Primary Language field just under the First Name field:

ACD: Contractor

New Contractor Save Edit Cancel Delete Reports Export Data Exit

Contractor Search Contractor Detail

Last Name	Jones	First Name	Jasper
Middle Name	Jenkins	Suffix	
Preferred Primary Language	English		
Contractor Type	Sole Proprietor	SSN/EIN	123555123
SSN			
Default Reported		Fiscal End Date	12/31
Status	Active		
UBI Number	P1 Id	Intake Form Date	7/31/2015
Ethnicity		Referral	

Contractor Default Address

Address Line 1	1234 12th Ave NW	Address Description	
Address Line 2	Apt. 101	Country	United States of America
City	Kalama	State/Province	WA
Zip Code	98222-2222		
Email Address	jasper@someemail.com	County	Cowlitz
Region	3		
Phone Number	(360) 555-1212	Ext.	
Contractor Fax			

Contractor Ownership

Disabled Owned		Certification Number	
Woman Owned		Certification Number	
Minority Owned		Certification Number	
Veteran Owned		Certification Number	
Community Based			

Contractor Contact Person

Contact Name		Contact Email	
Contact Phone		Contact Fax	

Sub-Information Summary

Display All Sub-Screens

Staff		Address		Check		Correspondence		DBA	
Contact		Mailing		Comment		Insurance		Contract	
Signatory		Billing		Audit		License		History	
		Facility							

Current Database: ACD Production

Fill-in Date of Birth

Go to the Staff sub-screen/Tab, and fill in the Date of Birth.

To do this, Click Edit, then click into the field, and use the arrow keys to navigate between the Month, Day and Year:

Then click Save.

The screenshot shows the 'ACD: Contractor' application window. The menu bar includes 'New Contractor', 'Save', 'Edit', 'Cancel', 'Delete', 'Reports', 'Export Data', and 'Exit'. The main header displays '166330', 'Jones, Jasper Jenkins', 'Sole Proprietor', and 'Active'. Below this, there are tabs for 'Contractor Search', 'Contractor Detail', and 'Staff'. The 'Staff' tab is active, showing a form for 'Jasper Jones', 'Owner'. The 'Date of Birth' field is highlighted with a red circle and contains '1/31/1970'. Other fields include 'SSN: 123555123', 'Phone: (360) 555-1212', 'Email: jasper@someemail.com', and 'Managing Employee / BOD: No'. To the right, there is a 'Staff Authority Information' section with radio buttons for 'Signatory Person?' and 'Contact Person?'. At the bottom, a table lists staff members:

Staff Title	First Name	Last Name	DOB	Tax Id	Ownership Percent	SG	Phone	Phone Ext	Pager
Owner	Jasper	Jones		123555123		Y	(360) 555-1212		

Current Database: ACD Production

Safety & Orientation Training Exemption

For new IPs only, if the IP is exempt from Safety & Orientation Training, add a Check screen entry to that effect – as shown in this screen shot.

Remember these conditions:

- Add this check ONLY for New Providers when exempt
- Do not add the check for a renewal
- Do not add the check when NOT exempt

The screenshot shows the 'ACD: Contractor' application window. The title bar indicates the contractor ID is 146185, the name is Jones, Graham, the role is Sole Proprietor, and the status is Active. The menu bar includes options like New Contractor, Save, Edit, Cancel, Delete, Reports, Export Data, and Exit. The main form is divided into sections: Contractor Search, Contractor Detail, and Check. The Contractor Detail section includes fields for Administration (EXEC), Division (OSSD), and Staff Person (Mark Tyler). The Check section includes fields for Contract Number (All Contracts), Date Completed (12/4/2015), Total Time, Type of Check (Combined IP Orientation and Safety Training), and Purpose of Check. A Comments field is also present. At the bottom, a table lists the check entries with columns for Contract No, Check Type, Check Purpose, Date, Time, Staff, Admin, Division, and Comments. The current database is identified as ACD Training.

Contract No	Check Type	Check Purpose	Date	Time	Staff	Admin	Division	Comments
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Start New IP Contract

Close the Staff screen and go to the Contract Sub-screen/Tab to start the new IP contract.

Click New on that screen:

The screenshot shows the 'ACD: Contractor' application window. The title bar reads 'ACD: Contractor'. The menu bar includes 'New Contractor', 'Save', 'Edit', 'Cancel', 'Delete', 'Reports', 'Export Data', and 'Exit'. The main content area is divided into three tabs: 'Contractor Search', 'Contractor Detail', and 'Contract'. The 'Contract' tab is active, displaying a form with the following fields:

- Contract Type (dropdown)
- Contract Code (dropdown)
- Service Description (text)
- Document Location (dropdown)
- Start Date (dropdown) and End Date (dropdown) with an Amount of **\$0.00**
- Contact Name (dropdown)
- Contract Address (dropdown)

A 'View Contract Detail' button is located to the right of the form. On the left side of the form, there is a vertical toolbar with buttons for 'New', 'Save', 'Edit', 'Cancel', 'Delete', and 'Close'. The 'New' button is highlighted with a red circle. Below the form is a table with the following columns: Status, Contract #, Amend #, Search Name, Amount, Total Amend, Current Max, Start Date, and Current End. The table is currently empty. At the bottom of the window, it says 'Current Database: ACD Production'.

Complete Contract Details

Complete all the yellow required fields.

NEW DETAIL: For Renewal contracts, please make sure the Start Date is the *First day* of the month; For all contracts, please make sure the End Date is the *Last day* of the month four years later:

The screenshot shows the 'ACD: Contractor' application window. The top menu bar includes 'New Contractor', 'Save', 'Edit', 'Cancel', 'Delete', 'Reports', 'Export Data', and 'Exit'. Below the menu, a header bar displays the contractor ID '166330', name 'Jones, Jasper Jenkins', business type 'Sole Proprietor', and status 'Active'. The main interface has three tabs: 'Contractor Search', 'Contractor Detail', and 'Contract'. The 'Contract' tab is active, showing a form with the following fields:

- Contract Type: 12 - Client Service Contract not competitively proc
- Contract Code: 1059XP-12 Individual Provider Services
- Service Description: Individual Provider Services
- Document Location: ADSA HCS Yakima Region 1
- Start Date: 8/1/2015
- End Date: 7/31/2019
- Amount: \$0.00
- Contact Name: Jasper Jones
- Contract Address: 1234 12th Ave NW Apt. 101, Kalama, WA, 98222-2222

A red circle highlights the Start Date and End Date fields. Below the form is a table with the following columns: Status, Contract #, Amend #, Search Name, Amount, Total Amend, Current Max, Start Date, and Current End. The table is currently empty. At the bottom of the window, it says 'Current Database: ACD Production'.

Save & Go To Contracts Module

Click Save to save the contract, and then click View Contract Detail to switch to the Contracts Module:

(Click Yes on the prompt that asks if you really want to leave the Contractor module.)

The screenshot shows the 'ACD: Contractor' application window. The top menu bar includes 'New Contractor', 'Save', 'Edit', 'Cancel', 'Delete', 'Reports', 'Export Data', and 'Exit'. Below the menu, a header bar displays the contractor's ID '166330', name 'Jones, Jasper Jenkins', business type 'Sole Proprietor', and status 'Active'. The main interface is divided into 'Contractor Search' and 'Contractor Detail' tabs. On the left, a vertical toolbar contains buttons for 'New', 'Save', 'Edit', 'Cancel', 'Delete', and 'Close'. The 'Contractor Detail' tab shows a form with the following fields: Contract Type (12 - Client Service Contract not competitively proc), Contract Code (1059XP-12), Service Description (Individual Provider Services), Document Location (ADSA HCS Yakima Region 1), Start Date (8/1/2015), End Date (7/31/2019), Amount (\$0.00), Contact Name (Jasper Jones), and Contract Address (1234 12th Ave NW Apt. 101, Kalama, WA, 98222-2222). A yellow button labeled 'View Contract Detail' is circled in red. At the bottom, a table lists contract details:

Status	Contract #	Amend #	Search Name	Amount	Total Amend	Current Max	Start Date	Current End
Pending	1512-22088		Jones, Jasper Jenkins	\$0.00	\$0.00	\$0.00	08/01/2015	07/31/2019

The status bar at the bottom indicates 'Current Database: ACD Production'.

Review Details; Check Taxonomies

On Contract Detail Page 1, review all of the data to make sure it's all correct, including the Start and End Dates, and the spelling of the name. Edit the dates if need be, and/or email the ACD Help Desk (eacdhelp@dshs.wa.gov), if the name needs to be corrected.

NEW PROCESS: Double-check the auto-selection of the "Taxonomies" by clicking Edit, then Select Taxonomy (*ALL taxonomy lines/check boxes should be selected*):

The screenshot shows the 'ACD: Contract' application window. The top menu bar includes 'New Contract', 'Save', 'Edit', 'Cancel', 'Delete', 'Reports', 'Export Data', 'Admin Tools', and 'Exit'. The main header displays contract information: 'Pending', '1512-22088', 'Contract (0)', '1059XP-12', '166330', and 'Jones, Jasper Jenkins'. Below this are tabs for 'Contract Search', 'Contract Detail (page 1)', and 'Contract Detail (page 2)'. The left sidebar contains various action buttons like 'Quick Approve', 'Open Document', 'Regenerate', 'Refresh Contract', and 'Insurance (0)'. The main content area is titled 'Contract Specification' and contains several sections: 'Contract Information' (Contract Name: Jones, Jasper Jenkins; Superseded Number; Procurement Number; Contract Start: 8/1/2015; Contract End: 7/31/2019; Current End: 07/31/2019; Contract Code: 1059XP-12 Individual Provider Services; Original Amount: \$0.00; Total Amendments: \$0.00; Current Maximum: \$0.00; Service Description: Individual Provider Services), 'Contract Reason' (with a red circle around the 'Select Taxonomy' dropdown), 'Contract Funding' (Percentage selected; Federal, State, and Other Funding all at \$0.00), 'Contract Contact Person' (Jasper Jones, Owner, Phone: (360) 555-1212), and 'Contract Address' (1234 12th Ave NW Apt. 101, Kalama, WA, 98222-2222). The status bar at the bottom indicates 'Current Database: ACD Production'.

Select Dba Name

NEW PROCESS: Make sure to select the provider's name in the Dba Name field:

The screenshot shows the 'ACD: Contract' application window. The top menu bar includes 'New Contract', 'Save', 'Edit', 'Cancel', 'Delete', 'Reports', 'Export Data', 'Admin Tools', and 'Exit'. Below the menu is a header bar with contract details: 'Pending', '1512-22088', 'Contract (0)', '1059XP-12', '166330', and 'Jones, Jasper Jenkins'. The main content area is divided into several sections:

- Contract Specification:** Includes fields for Contractor Name (Jones, Jasper Jenkins), Superseded Number, Procurement Number, Contract Start (8/1/2015), Contract End (7/31/2019), Current End (07/31/2019), Contract Code (1059XP-12 Individual Provider Services), and Service Description (Individual Provider Services). A red circle highlights the 'dba Name' dropdown menu, which is currently set to 'Jones, Jasper Jenkins'.
- Contract Funding:** Includes a table for funding sources and a section for 'Contract Funding' with radio buttons for 'Percentage' and 'Dollar Amount'. The table shows Federal, State, and Other funding, all at \$0.00.
- Contractor Contact Person (for this contract):** Includes fields for Contact Name (Jasper Jones), Contact Position (Owner), Email Address (jasper@someemail.com), and Phone Number ((360) 555-1212).
- Contractor Address (for this contract):** Includes fields for Primary Address (1234 12th Ave NW Apt. 101, Kalama, WA, 98222-2222), Facility Address, and Alternate Address.

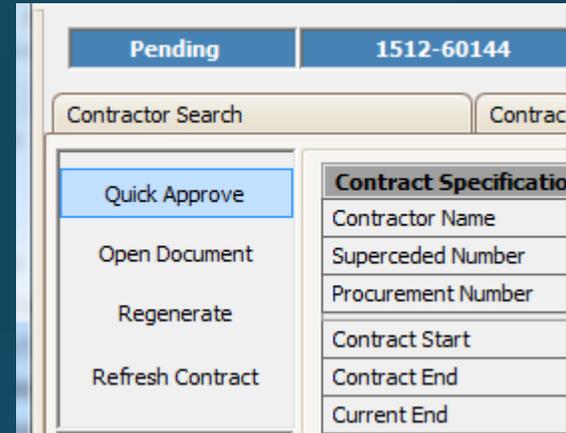
On the left side of the window, there is a sidebar with various options: Quick Approve, Open Document, Regenerate, Refresh Contract, Insurance (0), License (0), Correspondence (0), History (0), Audit (0), Perf. County (0), Document Mgmt (0), Payment System (0), Account Fund (0), Monitoring (0), Comment (0), PB Factors (5), Contractor Detail, and a 'Show All Tabs' checkbox.

At the bottom of the window, it says 'Current Database: ACD Production'.

Approve & Sign Contract

Approve the contract like normal – I recommend using Quick Approve so that the Approval and Open Document process is combined into one easy step. The Quick Approve button is on Contract Detail Page 1, in the upper left.

Once the contract is Approved, printed and signed by the IP, and DSHS or the AAA representative, then it must be put into Signed status in the ACD. The Signature button on Contract Detail Page 2 is used for those actions.



ProviderOne ID Assignment

When the DSHS Signature is added and Saved in the ACD, the contract is put into Signed status, and the provider and contract are sent over to ProviderOne. A ProviderOne ID is assigned, a W2 Location is created, and that information is returned to the ACD.

Once that is done, the ProviderOne ID and W2 Location number can be seen in the dba Name field on Contract Detail Page 1.

Click Refresh Contract, and the screen is refreshed to include the update just received from ProviderOne.

TIP: If the Dba Name is long, the ProviderOne ID may not be fully visible in the field. The user can click into that field, and use the keyboard arrows, or the End Key, to move the cursor in that field all the way to the right. Then the whole P1 ID and Location will be displayed, as shown in this screen shot.

The screenshot shows the 'ACD: Contract' application window. The 'Contract Specification' section is expanded, showing various contract details. The 'dba Name' field is highlighted with a red circle, displaying 'nes, Jasper Jenkins, P1 W2L: 204367301'. The 'Refresh Contract' button in the left sidebar is also highlighted with a red circle. The 'Contract Funding' section shows Federal, State, and Local funding amounts, all at \$0.00. The 'Contractor Contact Person' section shows Jasper Jones as the Owner with phone number (360) 555-1212. The 'Contractor Address' section shows the primary address as 1234 12th Ave NW Apt. 101, Kalama, WA, 98222-2222.

Contract Specification			
Contractor Name	Jones, Jasper Jenkins		
Superseded Number		dba Name	nes, Jasper Jenkins, P1 W2L: 204367301
Procurement Number		Contract Type	12 - Client Service Contract not competitivel...
Contract Start	8/1/2015	Original Amount	\$0.00
Contract End	7/31/2019	Total Amendments	\$0.00
Current End	07/31/2019	Current Maximum	\$0.00
Contract Code	1059XP-12	Service Description	Individual Provider Services
Select Subcode	<input checked="" type="checkbox"/> 3747P1801X : Pers Care Individual Provider : AL TSA : 106455 - Respite Care <input checked="" type="checkbox"/> 3747P1801X : Pers Care Individual Provider : DDA : 106455 - Respite Care <input checked="" type="checkbox"/> 3747R0000L : Respite Individual Provider : AL TSA : 106755 - Personal Care <input checked="" type="checkbox"/> 3747R0000L : Respite Individual Provider : DDA : 106755 - Personal Care		
Select Taxonomy			
Contract Reason			
Institution		Program Number	
Document Location	ADSA HCS Yakima Region 1	Program Code	
Contract Funding			
Percentage <input type="radio"/> Dollar Amount <input checked="" type="radio"/>			
Federal Funding % \$	0 \$0.00	Local Funding % \$	0 \$0.00
State Funding % \$	0 \$0.00	Other Funding % \$	0 \$0.00
Payment Method	FFS No Maximum	Subrecipient	No
Payment System		Available CFDA #'s	
		Selected CFDA #'s	
Contractor Contact Person (for this contract)			
Contact Name	Jasper Jones	Phone Number	(360) 555-1212 Ext.
Contact Position	Owner	Cell Number	
Email Address	jasper@someemail.com	Fax Number	
Contractor Address (for this contract)			
Primary Address	1234 12th Ave NW Apt. 101, Kalama, WA, 98222-2222		
Facility Address			
Alternate Address			

That's It – You're Done!

- Once the contract is in Signed Status, and the ProviderOne ID is assigned, the process is complete.
- Please email the ACD Help Desk at: eacdhelp@dshs.wa.gov if any error messages are received.

Additional possible scenario: The next series of screens show how to Import a provider from ProviderOne if there is no Contractor record yet in the ACD, but the provider does exist in ProviderOne.

Import Provider from ProviderOne

If your new contractor is found in ProviderOne, he or she can be imported into the ACD. The search below is looking for someone named James Jones, and was done with the search parameter of "Jones, Jam" – there are no ACD Source System records, but the provider does exist in ProviderOne. Note the highlighted row – verify the last four digits of the SSN:

The screenshot shows the 'ACD: Contractor' application window. At the top, there is a menu bar with options: New Contractor, Save, Edit, Cancel, Delete, Reports, Export Data, and Exit. Below the menu, a header bar displays 'JONES, James' and 'Active'. The main area is titled 'Contractor Search' and contains several input fields: 'DSHS Index', 'Tax ID Number', 'SSN', 'EIN', 'UBI Number', and 'Provider One Id'. The 'Search Name' field is checked and contains 'jones, jam'. Below the search fields, there is a 'Run Query' button, an 'Include Inactive Records' checkbox, and a 'Total Records (Max: 3500)' indicator showing '7' records.

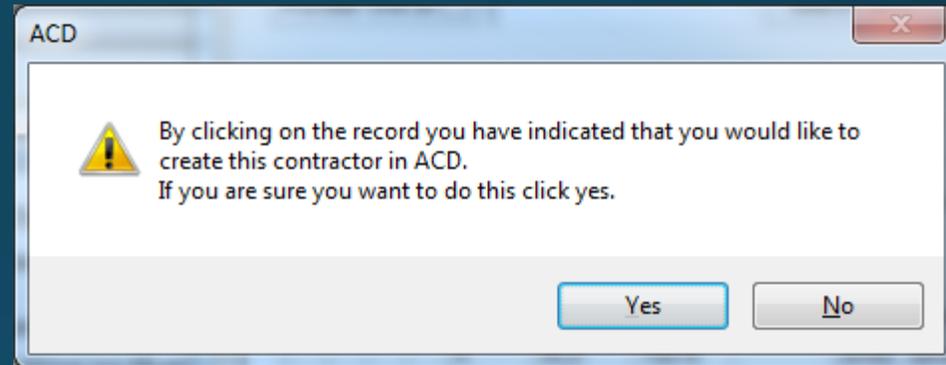
Flags				Status	Source System	DSHS Index	Provider One ID	Search Name	Identification	Business Type	UBI Number
D	C	A	T								
				A	ACD	32228		Jones, Jamina	7377	Sole Proprietor	
				A	ACD	75876		Jones, James D	9525	Sole Proprietor	
				A	ACD	122531		JONES, Jamey	0440	Sole Proprietor	
				A	ACD	132322		Jones, James A	1825	Sole Proprietor	
				I	Provider One		1032798	JONES, JAMES	9132		
				A	Provider One		1021426	JONES, James	2645		
				A	Provider One		2039838	JONES, JAMES	5403		

Current Database: ACD Production

Import Process

NOTE: The second and third James Jones are Active in ProviderOne, but the first is not. The Inactive record CANNOT be imported, and Provider Enrollment will have to be contacted to resolve the status issue in that system.

If one of the records matches on the last four digits of the Tax ID, then the provider can be imported into the ACD by double-clicking on that record. A message box pops up:



Click Yes to import that contractor into the ACD.

IMPORTANT NOTE: If the Import fails, either because the provider is Inactive in P1, or the provider is "Servicing Only" proceed with creating a New Contractor record just as if no search results were found (as shown on slides 3 thru 6 above).

Import Cont'd

The Contractor Detail screen will be filled in with data imported from ProviderOne:

Double-check the address, phone and email, and complete the Intake Form Date.

Click Save to save the new contractor record. Then proceed with adding the staff DOB, creating, editing, approving and signing the contract as with the normal process.

ACD: Contractor

New Contractor | Save | Edit | Cancel | Delete | Reports | Export Data | Exit

Contractor Search | Contractor Detail

Last Name	Jones		First Name	James	
Middle Name		Suffix	Preferred Primary Language		
Contractor Type	Sole Proprietor		SSN/EIN	000002645	SSN
Default Reported		Fiscal End Date	12/31	Status	Active
UBI Number		P1 Id	Intake Form Date		
Ethnicity		Referral			
Contractor Default Address					
Address Line 1	1234 12th Ave NE		Address Description		
Address Line 2			Country	United States of America	
City	Hadlock		State/Province	WA	Zip Code 98222-2222
Email Address			County	Jefferson	Region 3
Phone Number	(360) 555-1212	Ext.	Contractor Fax		
Contractor Ownership					
Disabled Owned		Certification Number			
Woman Owned		Certification Number			
Minority Owned		Certification Number			
Veteran Owned		Certification Number			
Community Based					
Contractor Contact Person					
Contact Name			Contact Email		
Contact Phone			Contact Fax		
Sub-Information Summary					
<input type="checkbox"/> Display All Sub-Screens	Staff	Address	Check	Correspondence	DBA
	Contact	Mailing	Comment	Insurance	Contract
	Signatory	Billing	Audit	License	History
		Facility			

Current Database: ACD Production

Renewals

To process contract renewals, the process is much the same, but starting with checking on the Owner Staff record to make sure the Date of Birth has been entered.

The renewal contract can be started from the Contracts Module though, by starting with a search on the old contract.

If the IP needs an address update, **DO NOT EDIT OVER THE EXISTING ADDRESS** in the ACD. Go back to Slide 6 to review the address change process.

The screenshot shows the 'ACD: Contract' application window. The title bar includes 'New Contract', 'Save', 'Edit', 'Cancel', 'Delete', navigation arrows, 'Reports', 'Export Data', 'Admin Tools', and 'Exit'. The main area contains search filters and a results table. A red circle highlights the 'Contract Number' field with the value '1212-60134'. The results table below shows one record for contract 1212-60134.

Status	Contract No	Amend No	Contractor Name	dba Name	Orig Amount	Amend Amount	Total Amend Amo...	Current Max	Start Date
Completed	1212-60134		Jones, Grant K.		\$0.00	\$0.00	\$0.00	\$0.00	11/01/2012

Current Database: ACD Training

Start New Contract

After finding the old contract that must be renewed, from the Contract Detail Page 1 screen, click on the New Contract drop-down, and then click on New DSHS Contract:

The screenshot shows the 'ACD: Contract' application window. The 'New Contract' dropdown menu is open, with 'New DSHS contract' highlighted. The background displays the 'Contract Specification' and 'Contract Funding' sections for a contract.

Contract Specification

Contractor Name	Jones, Grant K.		
Superseded Number		dba Name	
Procurement Number		Contract Type	12 - Client Service Contract not competitivel...
Contract Start	11/1/2012	Original Amount	\$0.00
Contract End	10/31/2015	Total Amendments	\$0.00
Current End	10/31/2015	Current Maximum	\$0.00
Contract Code	1022XP-12	Service Description	HCS Individual Provider Services
<input checked="" type="radio"/> Select Subcode			
<input type="radio"/> Select Taxonomy			
Contract Reason			
Institution		Program Number	
Document Location	ADSA HCS Tacoma Region 3	Program Code	

Contract Funding Percentage Dollar Amount

Federal Funding	% \$	0	\$0.00	Local Funding	% \$	0	\$0.00
State Funding	% \$	0	\$0.00	Other Funding	% \$	0	\$0.00
Payment Method	FFS No Maximum		Subrecipient	No			
Payment System	SSPS, id=123456		Available CFDA #'s	Add CFDA			
Selected CFDA #'s							

Contractor Contact Person (for this contract)

Contact Name	Grant Jones	Phone Number	(360) 555-1212	Ext.	
Contact Position	Owner	Cell Number			
Email Address	grant@email	Fax Number			

Contractor Address (for this contract)

Primary Address	1234 Hampton Court SW , Olalla, WA, 98333-3333				
Facility Address					
Alternate Address					

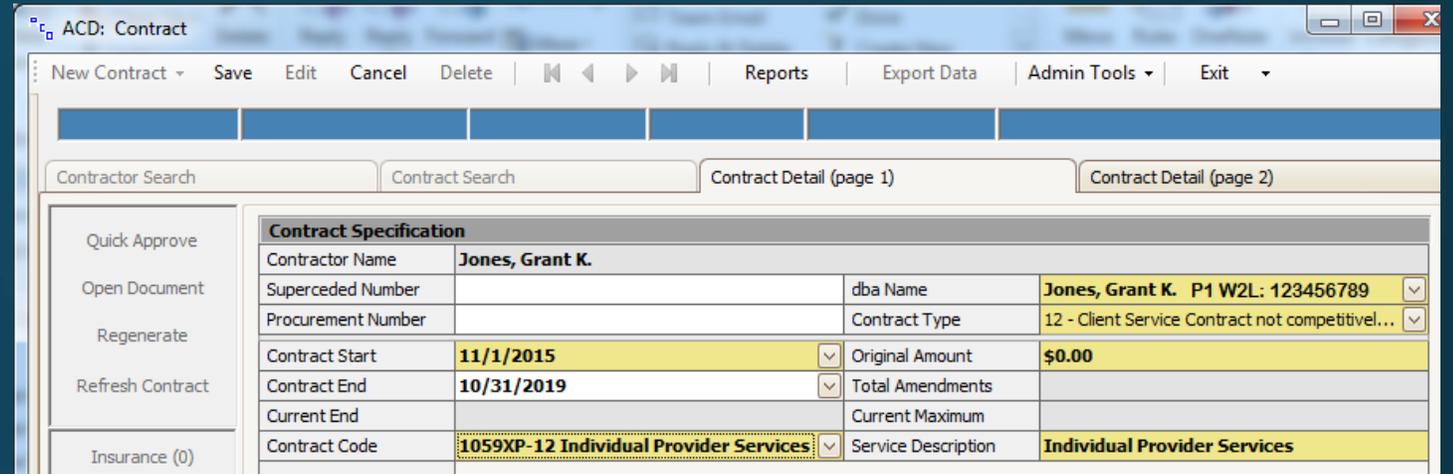
Current Database: ACD Training

Contract Details

Select the Dba Name with the W2L ProviderOne ID set, and select the usual Contract Type 12, Contract Code 1059XP-12, and set the Start and End Dates (End of the month after 4 years!).

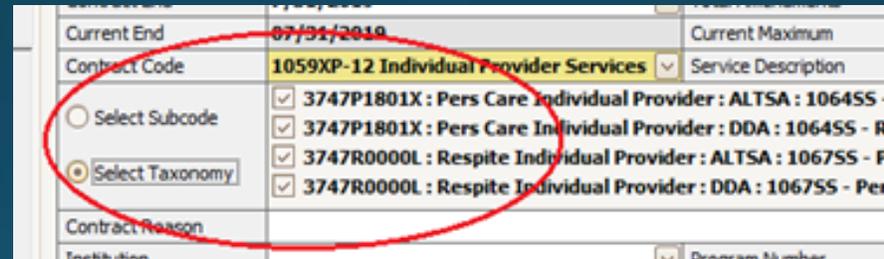
Also make sure ALL the Taxonomy boxes are checked. Then click Save.

After saving the new contract, proceed with Approval and Signatures, just like before. But watch for any errors when setting the DSHS Signature Date, and contact the ACD Help Desk if one occurs.



The screenshot shows the 'ACD: Contract' application window. The 'Contract Specification' section is visible, containing the following data:

Contract Specification			
Contractor Name	Jones, Grant K.		
Superceded Number		dba Name	Jones, Grant K. P1 W2L: 123456789
Procurement Number		Contract Type	12 - Client Service Contract not competitivel...
Contract Start	11/1/2015	Original Amount	\$0.00
Contract End	10/31/2019	Total Amendments	
Current End		Current Maximum	
Contract Code	1059XP-12 Individual Provider Services	Service Description	Individual Provider Services



This close-up screenshot shows the 'Select Taxonomy' section of the application. The 'Select Taxonomy' radio button is selected and circled in red. Below it, four taxonomy items are listed with checked checkboxes:

- 3747P1801X : Pers Care Individual Provider : AL TSA : 106455 - P
- 3747P1801X : Pers Care Individual Provider : DDA : 106455 - Re
- 3747R0000L : Respite Individual Provider : AL TSA : 106755 - Pe
- 3747R0000L : Respite Individual Provider : DDA : 106755 - Pers