

# Module 8 Chapter 4

## Business Organization Search

### Overview

Business Organizations are entities with which workers have regular involvement to support work with children and families.

Your agency's Business Organization database is like a rolodex where you enter, edit, search for and bring organizations into workgroups, placements, education records and employment records. This search also helps you locate organizations to arrange service agreements and payments.

### Business Organization Search

In SSIS Business Organizations are classified as vendors or non-vendors:

- Vendors are organizations or agencies that provide services to clients and are paid and/or licensed by a county or the state.
- Non-vendors are organizations, agencies or individuals that offer services to clients but are not paid or licensed by a county or the state.

Within these two types, business organizations can be further categorized as:

- Law Enforcement
- Medical
- Mental Health
- Schools
- Other.

This Training focuses on searching for and bringing in existing Business Organizations to complete placement records, school records, employment records, or service arrangements and does not cover how to add or edit Business Organizations.

### Access

Business Organization Search can be accessed in one of four ways:

- From the Windows toolbar under Searches/Logs
- From the Application toolbar
- From the Task Panel
- From within a placement, education, or employment record, or service arrangement entry.

To add a Business Organization to a placement, school or education record, or to a service arrangement, you must access Business Organization Search from within that particular screen.

Let's look at the Business Organization Search Screen which includes three search tabs:

- General
- License, Status, & Service
- Individual Provider & Professional Collateral.

A search can be conducted using any of these tabs, by entering or selecting information on any fields of the tabs, or by leaving the fields blank. To avoid lengthy search results, use at least one search field.

### **General Tab**

First let's look at the search options on the General tab. Click on each field to find out more about how that field helps you conduct Business Organization Searches.

Use the **Name** field to search using the full name or the first letter(s) of the Business Organization.

The **Include** field is a drop-down menu with the following selections:

- Vendors – business organizations that are entered as foster care providers or day care providers as well as other providers who will be paid.
- Non Vendors – all other business organizations.

The **Type** field is primarily used for non-vendor searches. The drop-down menu more narrowly focuses the results of business organization. Selections are:

- Law Enforcement
- Medical
- Mental Health
- Other
- Placement provider
- School.

Note that if type was not indicated during the business organization entry, results will not display these records.

Use the **SSIS Bus. Org. #** field to search for either a vendor or non-vendor by the SSIS #.

Use the **MMIS Provider #** field to search for a vendor by the MMIS Provider #.

Use the **County Vendor** field to search for a vendor by the County Vendor #.

Use the **City** field to search for either a vendor or non-vendor by the name of the city.

Use the **Federal Tax ID** field to search for a vendor by the federal tax identification #.

Check the “Include ONLY Business Organizations that have missing AFCARS/ESEA information” box to narrow the search to vendor Business Organizations that have missing AFCARS or ESEA information.

The “Return payment address, phone, and fax” checkbox defaults to checked, meaning the results display the payment address, phone and fax. When you do not want to view this information, uncheck the box.

The “Active only” checkbox defaults to checked, meaning the results display only active business organizations. When you want to display inactive business organizations, uncheck the box.

### **License, Status, & Service Tab**

Let’s look at search options on the License, Status, & Service tab. Searches using the fields of this tab are for licensed vendors only. Click on each field to learn more.

Use the **License Type** field to search for a vendor by specific type of license, for example Child Foster Care. The drop-down menu contains the text description of each license type.

Use the **License Status** field to search for a vendor by the status of the license, for example Granted, Revoked, Closed, etc.

The **Service** field drop-down menu allows a search by either the BRASS service code (number) or service description.

Clicking on the **Code Toggle** button located at the end of the Service field switches the view of the selection in the Service field to display the code number first, then description or vice versa.

### **Individual Provider & Professional Collateral tab**

And finally, the Individual Provider & Professional Collateral tab allows searching for individual providers or professional collaterals by First Name, Last Name or SSIS Person #.

### **Search Results**

After search criteria is entered, click the Search button to display results.

If no results display:

- Double check your search options and change accordingly.
- Check your spellings and correct any errors.
- Click the Clear button to clear the fields on each of the tabs to start your search over.

If the business organization cannot be located, a new organization may need to be added. Vendors must be added to the accounting system and imported into SSIS. Check with your supervisor or SSIS mentor or coordinator to determine your agency’s protocol for adding new business organizations.

When you locate a provider, results appear in a screen with a grid. Multiple results display in alphabetical order.

### **Preview Panel**

When you select an entry in the grid, a preview panel displays. Depending on the type of entry, up to three tabs may display.

For non-vendor records, two preview panel tabs may display:

- General Information, identifying information for all Business Organizations
- Parent / Payee Bus Orgs, displaying the parent or payee business organizations entered for the selected record. When no parent/payee organization is entered, only General Information displays.

For vendor records, three tabs may display on the preview panel:

- General Information
- Foster Care / Day Care Provider
- Parent / Payee Bus Orgs, if applicable.

### **General Information tab**

**Name** as entered into the SSIS Business Organization database.

**Bus. Org. Status** displays the status of a vendor, Active or Inactive.

**Effective** displays the effective date of the most recent license status entry for vendors.

**Voucher Method** – used for vendors, either No Pre-Printed Voucher or Pre-printed Voucher.

**Default 1099** displays whether a vendor's 1099 record defaults, does not default or if the 1099 status is undetermined.

**Type** displays the type of Business Organization, if used.

**County Vendor #** displays the imported ID number from the county accounting system.

**SSIS Bus. Org. #** displays the system-assigned number.

**MMIS Provider #** displays the imported system-assigned number from the county accounting system.

**Federal Tax ID #** displays the imported tax ID number for vendors from the county accounting system.

**NPI** is the National Provider Identifier for vendors, the imported number that will be used in future from the county accounting system.

### **Foster Care / Day Care Provider tab**

The Foster Care / Day Care Provider tab displays information specific to foster care and day care vendors. Click on the fields on this tab to learn more.

**SSIS Provider #** displays the system assigned number.

The **“IV-E Eligible”** checkbox indicates the foster care provider is IV-E eligible.

**Foster Family Setting** displays the setting choice for foster care.

**School district** displays the school district in which the vendor is located.

**Family structure** displays the family structure of a foster care provider.

The **“Registered Child Care Provider”** checkbox indicates that this is a Registered Child Care Provider.

### **Parent/Payee Bus Orgs Tab**

A parent business organization is the main or central business office. A payee business organization is the agency, company or office that receives payment for a service from the county or tribal agency. This may or may not be the parent business organization.

If there is a parent or payee business organization, it displays in a grid on this tab.

The columns are:

- Description: whether the organization is a parent or payee.
- Bus. Org Name: the name of the parent and/or payee business organization.
- SSIS Bus. Org. #
- County Vendor #.

By selecting the business organization in the Parent/Payee Bus Org grid and expanding the Tree View, you can view more information specific to the business organization.

The **Individual Providers** folder is used only for resource family providers. It lists providers in the household and includes basic demographic information.

The **Parent/Payee Bus Org** folder displays only when a parent or payee business organization exists.

The **Address/Phone/Email** folder displays contact detail.

**Client Will Serve Preferences** - This folder helps you determine whether the selected placement provider provides care to children or adults of specific age, gender, or disability.

The **Licenses** folder displays license information, including the status and when it was granted. The license number is needed for Title IV-E. The Site / Facility tab includes information regarding the type of IV-E facility.

The **Services Offered** folder lists services the business organization can offer.

The **Professional Collaterals** folder includes collaterals that manage this facility, such as a treatment foster home case worker who works with a resource family.

**Fiscal Details** includes service arrangements and payments made to the business organization.

Let's say you have located the correct provider and you want to add them to a placement. First, check that the Bus Org Status is active.

Next, click the Select button to bring the business organization into the record you are entering.

## Business Organization Search FAQ

I am trying to enter a business organization into a placement, education, or employment record or service arrangement but can't select it.

If you don't see a Select button in the lower right-hand corner, you have not opened Business Organization Search correctly. Close your current Business Organization Search and look for the Business Organization Search button within the entry you are currently making.

Also, when entering service arrangements, a vendor must be active and have a county vendor number for the select button to be enabled.

There are some errors on the business organization that I located. What do I do?

When you see errors on a business organization entry, talk with your supervisor, SSIS mentor or coordinator to find out who edits business organization entries in your agency.

I am trying to locate a business organization but I cannot locate it.

When you have difficulty locating a business organization, you have several options. First, try adjusting your search criteria. If that doesn't work, click the Clear button and start over. This will clear all of the entries on any search tab, which may be affecting your search. If you still can't find the business organization, talk with your supervisor, SSIS mentor or coordinator for assistance. A new entry may need to be made.

I want to find out if a placement provider has certain placement preferences. Where do I look?

To discover the placement provider's preferences, locate the provider and then look at the Client Will Serve Preferences folder.

I want to know if the placement provider already has children placed with them.

Talk with your licensing staff or directly with the placement provider to discover whether a provider already has children placed. SSIS does not track this information by provider.

## Summary

You will use Business Organization search regularly in your work. Key elements in SSIS include:

- The organization's status as a vendor or non-vendor
- Whether the organization is active or inactive
- Whether the organization has separate entries for Parent and Payee listings.

You will want to become familiar with information provided in folders available from the Tree View.

## Next Steps

From the Attachments tab, print the Business Organization Search transcript.

Handouts are available on the SSIS website. Print handouts that may be helpful in your work, or bookmark the page for future reference. A list of these handouts is available from the Attachments tab.

Complete the Module Post-Test and print your results.

When you are ready, begin Module 9.