Business Organization in SSIS Worker

Table of Contents

Introduction

Federal SACWIS requirements mandate that Social Service Information System (SSIS) include the ability to make payments for child welfare services. In order to make accurate payments, report AFCARS data and/or other state required data, the system needs accurate information about the business organization.

Business organizations may provide a service to a client, may be an employer of a client, employer of a professional collateral, or may be a parent organization for a service provider.

Business organizations are described from a variety of perspectives and any one business organization could be characterized in multiple ways:

- Vendor/ Non-Vendor
- Licensed/ Non-Licensed
- Employer
- Parent/ Sub-Organization
- Payee/ Service Organization
- Foster Care Provider/Daycare Providers
- School
- Law Enforcement.

Business organizations are either paid or not paid by the agency. Business organizations that receive payment from the agency are vendors. Examples of a vendor include foster parents and agency contracted service providers (i.e., in-home service, home and community based service, interpreter service, psychological assessment, chemical dependency assessment, parenting assessment). A non-vendor is a business organization that does not receive payment from the agency and does not have a vendor number. Examples include schools, local businesses that employ clients and/or other professional collaterals, Law Enforcement, etc.

Hints:

- *Counties enter vendors and payees in the County Accounting System and the vendor import process sends information to SSIS. The imported information is not editable in SSIS.*
- *Tribes create vendors by creating new Business Organizations and assigning the vendor number directly in SSIS.*

Some business organizations are part of a larger organization, e.g., Food Shelf East and Food Shelf West are both under the county food shelf. SSIS allows entry of the hierarchy of organizations by using the parent organizations and sub-business organizations. For example, Saint Paul Public School District is the parent organization and the various schools within the district are entered as sub-business organizations.

Security

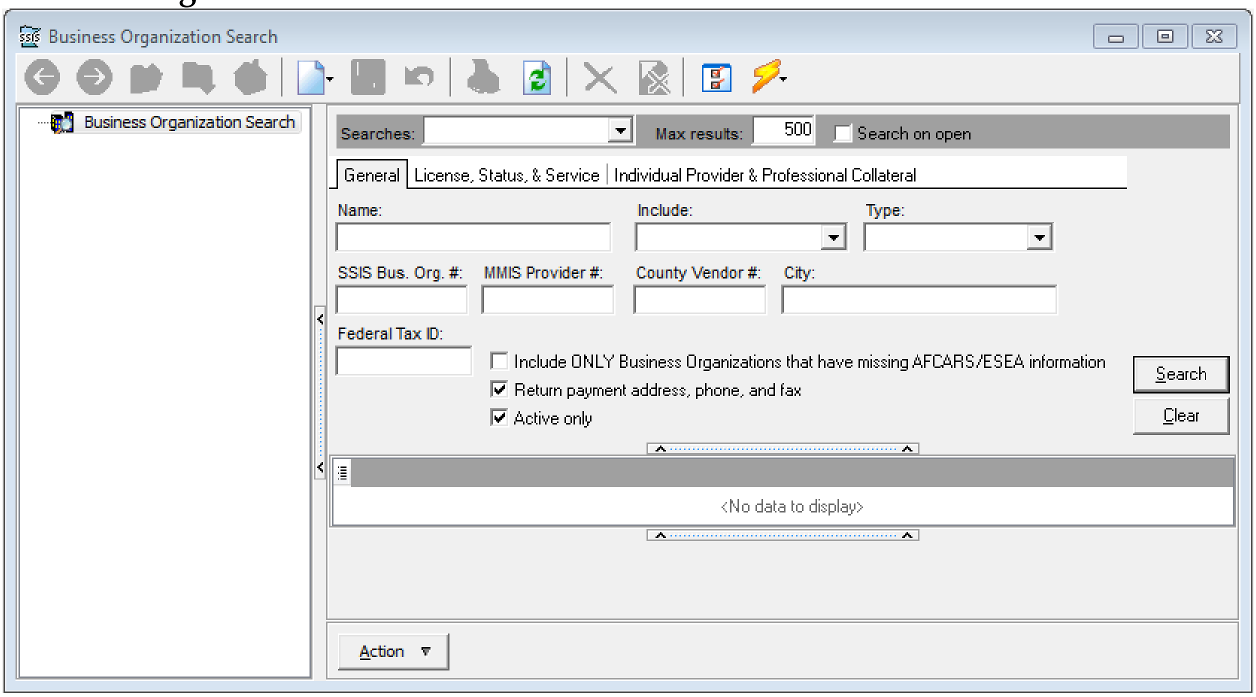
At a minimum, to be able to add a business organization or edit information, the assigned Security Administrative roles must include Create Provider, Create Bus Org and/or Create Bus Org Services.

Warning: Always first search for a business organization before creating a new one to make sure the business organization does not already exist in SSIS and prevent creating a duplicate.

Business Organization Search

Use Business Organization Search to locate business organizations using any combination of the search fields and tabs. To avoid duplicate entries, search for the Business Organization before entering a new record.

Business Organization Search



To use the Business organization Search, select one of the following three tabs:

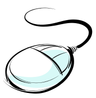
- General
- License, Status & Service
- Individual provider & Professional Collateral.

The Business Organization Search icon is available from many additional access points, allowing workers to open the search screen and select a business organization. The Business Organization Search icon displays beside the corresponding fields on the screens listed below:

- Merge Bus Org
- Placement
- Payment
- Payment Search
- Service Arrangement
- Service Arrangement Search

- Service Arrangement Group
- Service Arrangement Group Search
- Service Agreement
- Service Agreement Search
- Facility Information
- Adult Maltreatment Report
- Employment
- Education.

To Access Business Organization Search:

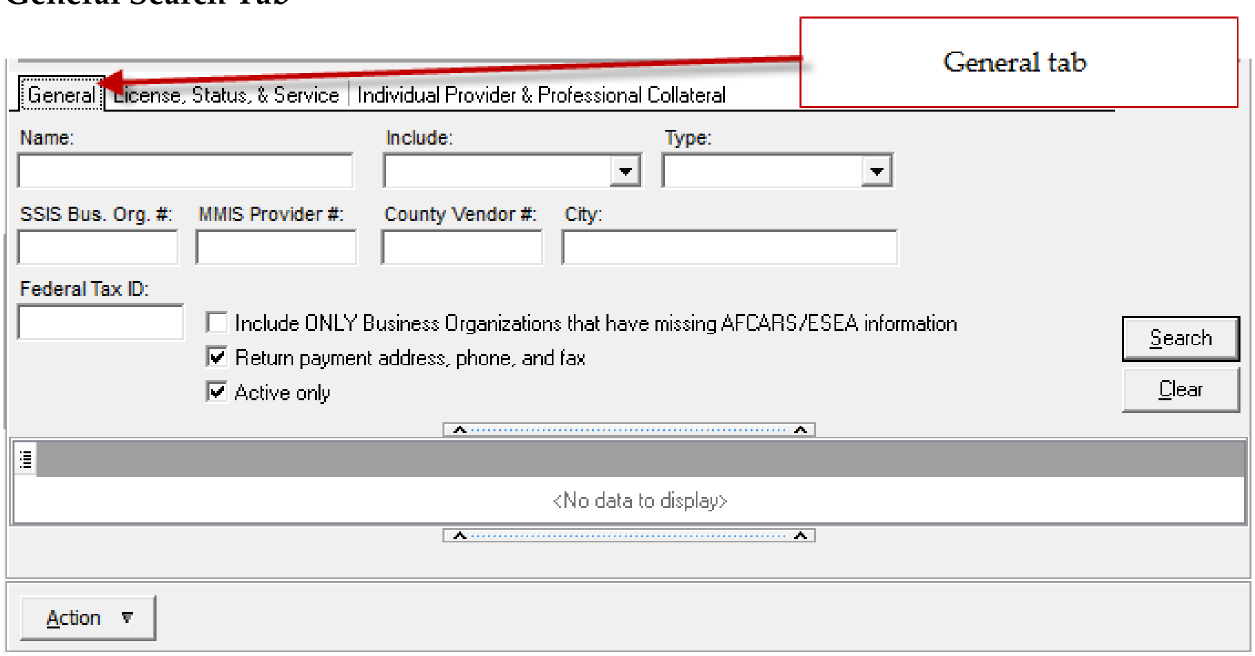


1. Access **Business Organization Search** on the:
    - **SSIS Application** toolbar. Click the **Business Organization Search** button.
    - **Task Panel.** Select **Searches>Business Organization Search**.
2. The **General** tab displays as default search.

Business Organization Search-General

Use the General Search if you know the business organization name, business category, type, city or business organization specific numbers.

General Search Tab



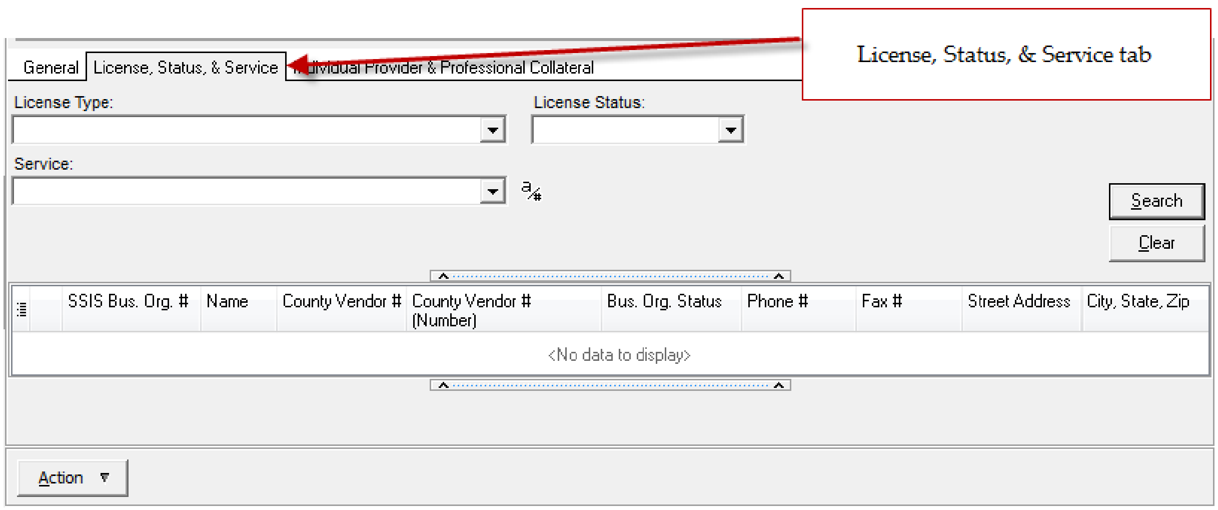
To Search for a Business Organization using the General tab:

1. From the **Business Organization Search** node in the Tree View, enter or select search options available from the drop-down menus.
2. Click the **Search** button.
3. Search results display in the grid.

Business Organization Search- License, Status, & Service

Users can search for business organizations associated with specific licenses, license status or services provided. Searches using fields of this tab are for licensed vendors only, e.g., Foster Care or Day Care providers.

License, Status, & Service Search tab



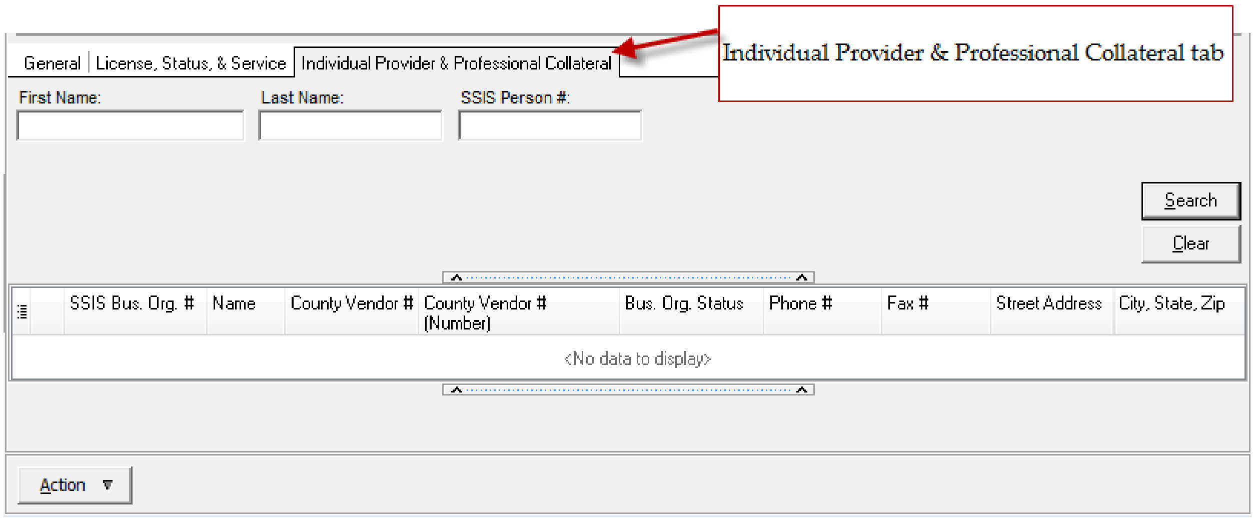
To Search for a Business Organization using the License, Status, & Service tab:

1. From the **Business Organization Search** node in the Tree View, click **License> Status, & Service** tab.
2. Select search options available from the drop-down menus and click the **Search** button.

Hint: The Service drop-down menu can be sorted by code (BRASS Service #) or Service Description by clicking the code toggle button to the right of the field.

Business Organization Search- Individual Provider & Professional Collateral
Use the Individual Provider & Professional Collateral search to look for individuals associated with a business organization. An individual provider is a foster parent and a professional collateral is a person who provides services and/or serves as a resource to a family and/or a client.

Individual Provider & Professional Collateral Search tab



To Search for a Business Organization using the Individual Provider & Professional Collateral tab:

1. From the **Business Organization Search** node in the Tree View, click on the **Individual Provider & Professional Collateral** tab.
2. Enter search criteria and click the **Search** button.

Create a New Business Organization

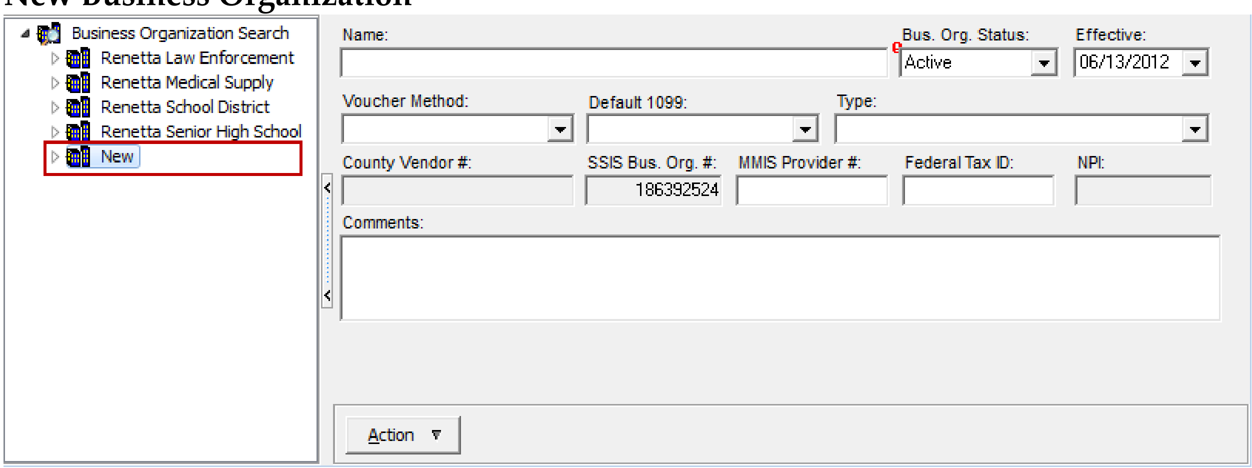
Enter non-vendor business organizations directly into SSIS. Enter vendors into County Accounting Systems, and then import this information utilizing the vendor import process. Tribes enter all vendors as business organizations into SSIS without importing from their accounting system.

The General Information tab provides an overview of the identifying information for the business organization. The Business Organization screen may display a combination of tabs.

- Foster Care/ Day Care Provider tab- displays when a foster care/day care provider entry is added to the business organization.
- Parent/Payee Bus Orgs tab- displays if the selected business organization has a parent organization association.
- Service Bus. Orgs/Sub Bus. Orgs. tabs- display if the selected business organization has a sub/service organization association.

If vendor import is used, the County Vendor #, MMIS Provider #, Federal Tax ID and NPI fields are not editable.

New Business Organization



To Create a New Business Organization:

1. Search for the business organization to make sure it does not already exist in SSIS.
    - If the business organization is found, review the business organization record to determine if it is the same business organization and/or make updates or changes as needed.
    - If the business organization is not found, continue to step 2.

2. From the **Business Organization Search** node in the Tree View, access the **Action** menu and select **New Business Organization**.
3. Enter the name of the business organization in the **Name** field on the **General information** tab.
4. Select the status from the **Bus. Org. Status** drop-down menu.
5. Enter the effective date in the **Effective** field.
6. Select the voucher method from the **Voucher Method** drop-down menu, if a vendor.
7. Select the default 1099 from the **Default 1099** drop-down menu.
8. Select the type of business organization from the **Type** drop-down menu.
9. If a vendor, enter the **MMIS Provider #** and the **Federal tax ID**, if applicable.
10. Enter notes or description in the **Comments** field, if applicable.
11. Click **Save**.

Hints:

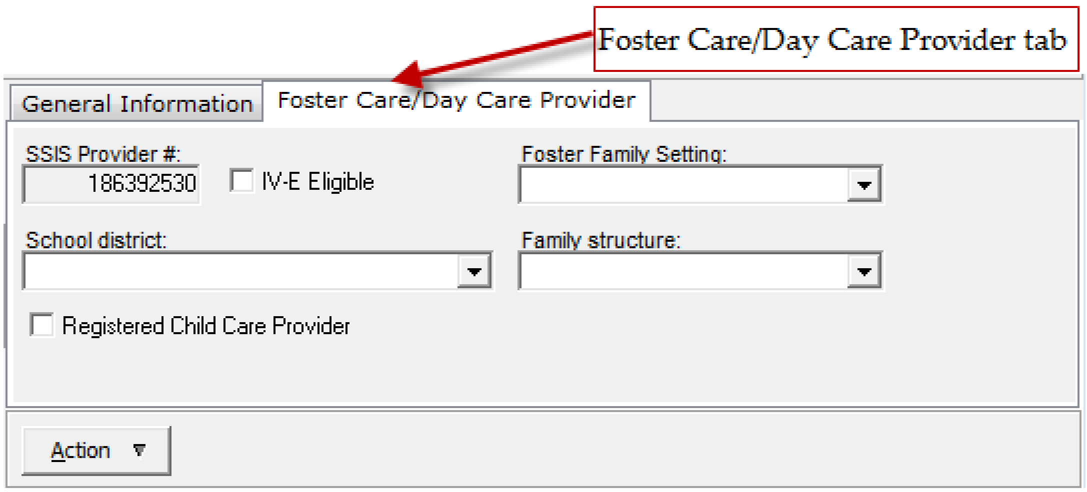
- *Tribes enter County Vendor #'s.*
- *The local agency determines a standard naming convention for naming Business Organizations, e.g., Burgess Family Foster Care*
- *If the Bus. Org. Status for an imported vendor is incorrect, the user must change the status in the County Accounting System and reimport.*

STOP *Warning: When creating a new business organization, do not use 'The' at the beginning of a Business Organization's name. Search results display the names as entered, i.e., enter Burgess Family Foster Care instead of The Burgess Family Foster Care.*

Create a New Foster Care/Day Care Provider

The Foster Care/Day Care Provider tab displays information specific to foster care and day care business organizations. To complete AFCARS elements the worker must create the Foster Care/Day Care Provider information.

Foster Care/Day Care Provider Tab



To Create a New Foster Care/Day Care Provider:

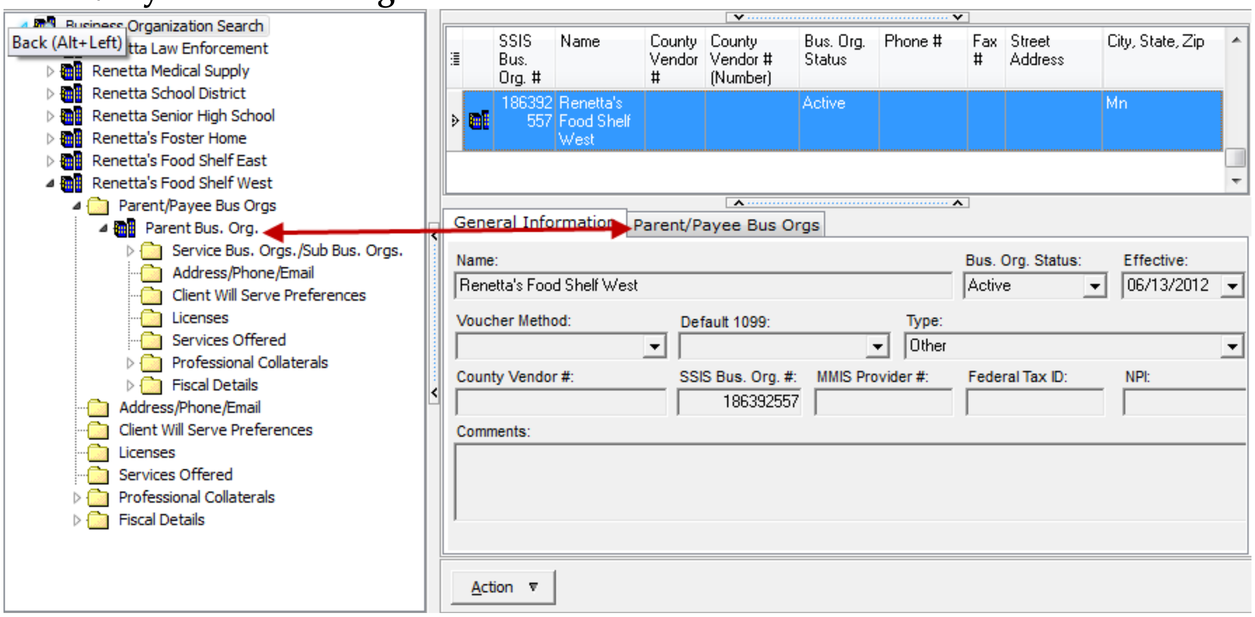
1. Select the **Business Organization** from the Tree View, access the **Action** menu, and select **New Foster Care/Day Care Provider**.
2. Check the **IV-E Eligible** field, if qualified for IV-E.
3. Select the type of foster care/day care setting from the **Foster Family Setting** drop-down menu.
4. Select a school district from the **School District** drop-down menu.
5. Select the family marital status from the **Family Structure** drop-down menu.
6. Check **Registered Child Care Provider** field, if applicable.
7. Click **Save.**

Hint: Social Workers may view this tab prior to placing children to determine the placement provider's school district and/or whether the placement provider is IV-E eligible.

Parent Business Organizations

A parent business organization is an organization that owns or controls other business organizations. Users can designate an existing business organization as a parent business organization or create a new parent business organization. In the previous example, a county food shelf has two locations: Food Shelf East and Food Shelf West; both are under the county food shelf umbrella.

Parent/Payee Business Organization Association



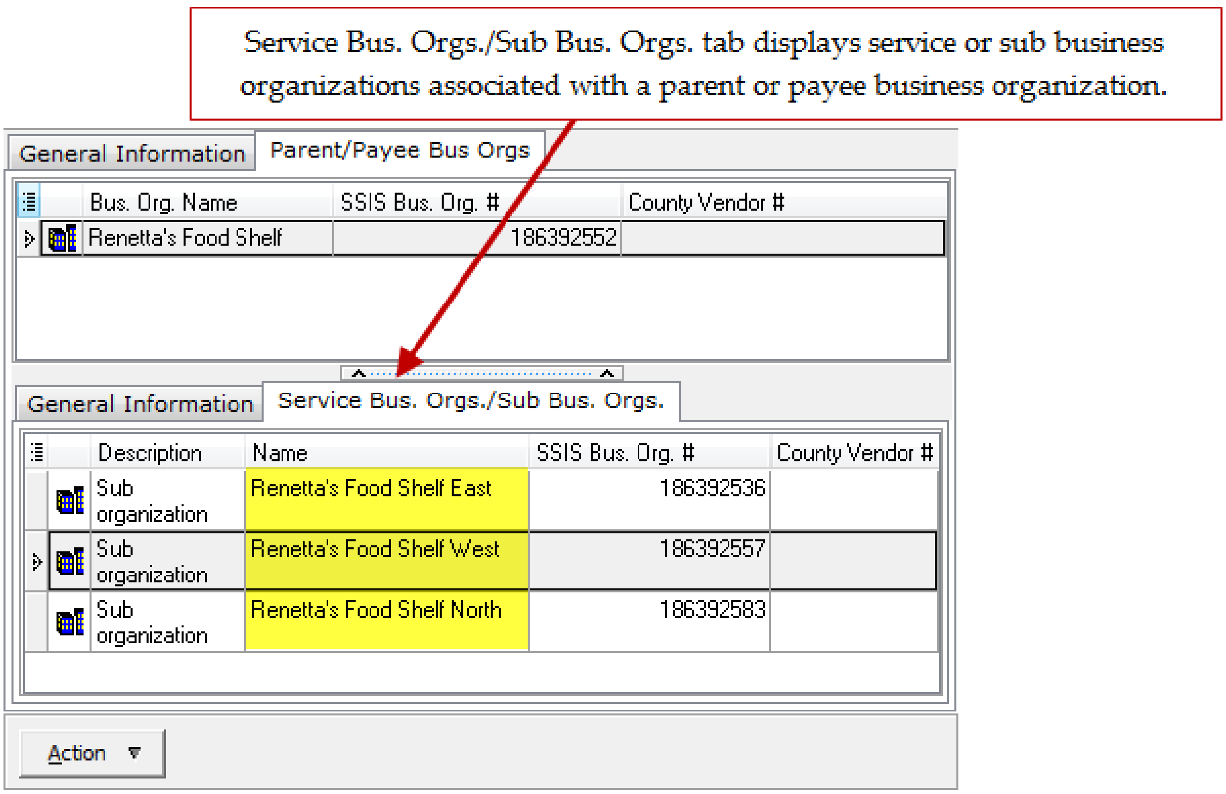
To Create a New Parent Business Organization:

1. Highlight the business organization in the Tree View, access the **Action** menu, and select **New Parent Bus. Org.**
2. Enter the parent business organization's name in the **Name** field.
3. Select the business organization's status from the **Bus. Org. Status** drop-down menu.
4. Enter application information in the remaining fields.
5. Click **Save**.
6. The new parent business organization is now associated to the business organization and displays on the **Parent/Payee Bus Orgs** tab.

To Associate an Existing Parent Business Organization to a Business Organization Record:

1. Highlight the business organization in the Tree View, access the **Action** menu, and select **Add Existing Parent Bus. Org.**
2. Complete the **Business Organization Search** to find the existing parent business organization.
3. Highlight the existing parent business organization in the grid or Tree View and click the **Select** button.
4. The existing parent business organization is now associated with a business organization and displays on the **Parent/Payee Bus Org** tab.

Service Bus. Orgs./Sub Bus. Orgs. Tab:

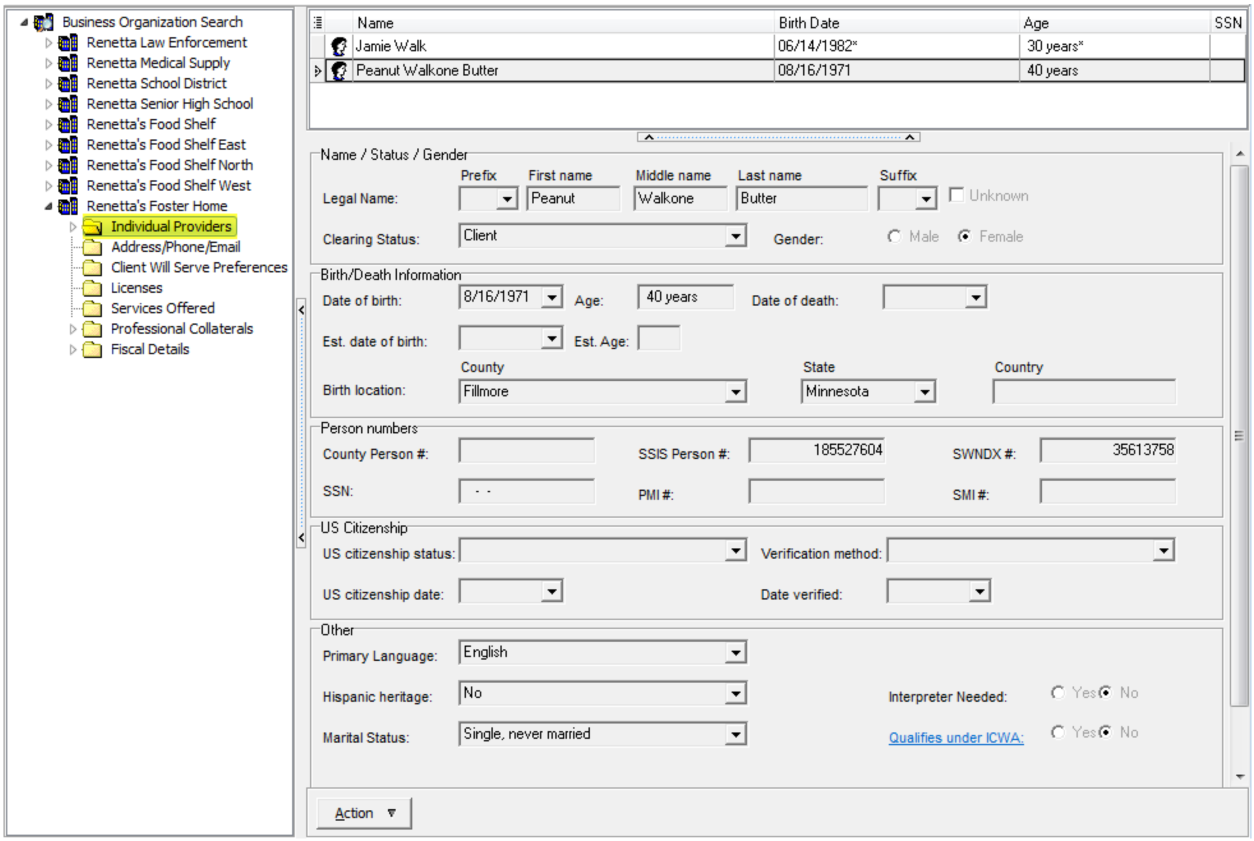


If this business organization is a parent or payee business organization, then this tab displays a grid of all its service or sub business organizations. The Service Bus. Orgs./Sub Bus. Orgs. tab allows the user to see the associated business organizations, known as a service or sub-organization, of the parent business organization or payee business organization.

Individual Providers

The Individual Providers folder displays in the Tree View for child foster care parents.

Individual Providers



To Create New Individual Providers for a Business Organization:

1. After creating a new Foster Care/Day Care provider, select the **Individual Providers** folder in the Tree View (under the appropriate foster care business organization) and access the **Action** menu.
2. Select **New Individual Provider** and enter the required information.
3. Click **Save**.
4. Repeat steps 1-3 as needed.

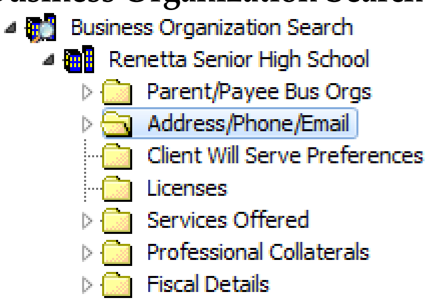
To Add Existing Individual Providers to a Business Organization:

1. From the **Individual Providers** folder (under the appropriate foster care business organization) in the Tree View, access the **Action** menu and select Add **Existing Individual Provider**.
2. Enter search information on the **Person Search** screen and click **Search**.
3. Select individual provider in the search results grid.
4. Click **Select** button.
5. Repeat steps 1-4 as needed.

Add or Edit Address/Phone/Email

Add address, phones and emails for the business organization in the Address\Phone\Email folder in the Tree View. To add or edit non-imported information, select one of the folders under the business organization's node on the Tree View.

Business Organization Search Tree View



Best Practice: Enter the business organization's physical location and work phone numbers.

Hints:

- *For counties: Imported addresses, phones or emails are not editable. Additional entries can be made, but Type cannot be Payment. If Payment type address, phones or emails are incorrect, fix in the County Accounting System.*
- *Tribes may enter or edit Payment type address, phones, emails in SSIS.*

Existing Address, Phone and/or Email

Users can add an address, phone and/or email to a business organization from an address, phone or email that is already associated with that business organization, parent business organization or another business organization. For example, if the business organization's physical location address is the same as the mailing address, and the user would like to have both types of addresses entered, then the user can select an existing address on the menu. The information will autofill and the user should then change the Type field to the appropriate address type.

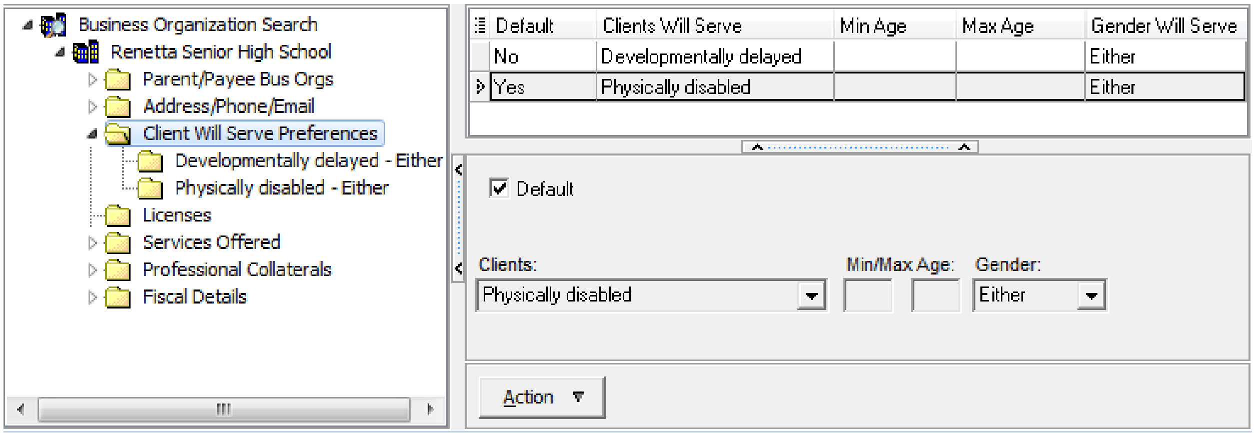
Hints:

- *Use caution when selecting the appropriate existing address, phone and/or email since this functionality creates associations with existing records.*
- *Do not overwrite the original address/phone/email screen. Instead, create a new or add existing address/phone/email to generate a chronological history.*
- *To edit the business organization's existing information, select the Address/Phone/Email folder in the Tree View. Click in the screen and make necessary update(s), e.g., add an end date to an address and enter a new address.*
- *Users can add an existing client and/or collateral to the selected address/phone/email record. Select the Address/Phone/Email folder in the Tree View, access the Action menu and select Add Existing Client or Add Existing Collateral. Complete the Person search and highlight the appropriate client or collateral and then click the Select button.*
- *On the Business Organization Search screen, check the 'Return payment address, phone and fax' box to display all addresses in the search results grid.*

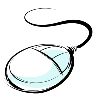
Client Will Serve Preferences

Use the Client Will Serve Preferences folder to enter details about business organizations preferred clients, if any, e.g., age and/or gender of the clients the business organization serves.

Client Will Serve Preferences Screen



To Enter New Client Will Serve Preferences:



1. From the **Client Will Serve Preferences** folder, access **Action** menu.
2. Select **New Client Will Serve Preference**.
3. Check the **Default** box, if applicable, when the current entry is the business organization's preference when multiple **Clients Will Serve** entries exist.
4. Select the type of clients from the **Clients** drop-down menu.
5. Enter the preferred age range in the **Min/Max Age** field.
6. Select the preferred gender from the **Gender** drop-down menu.
7. Click **Save**.

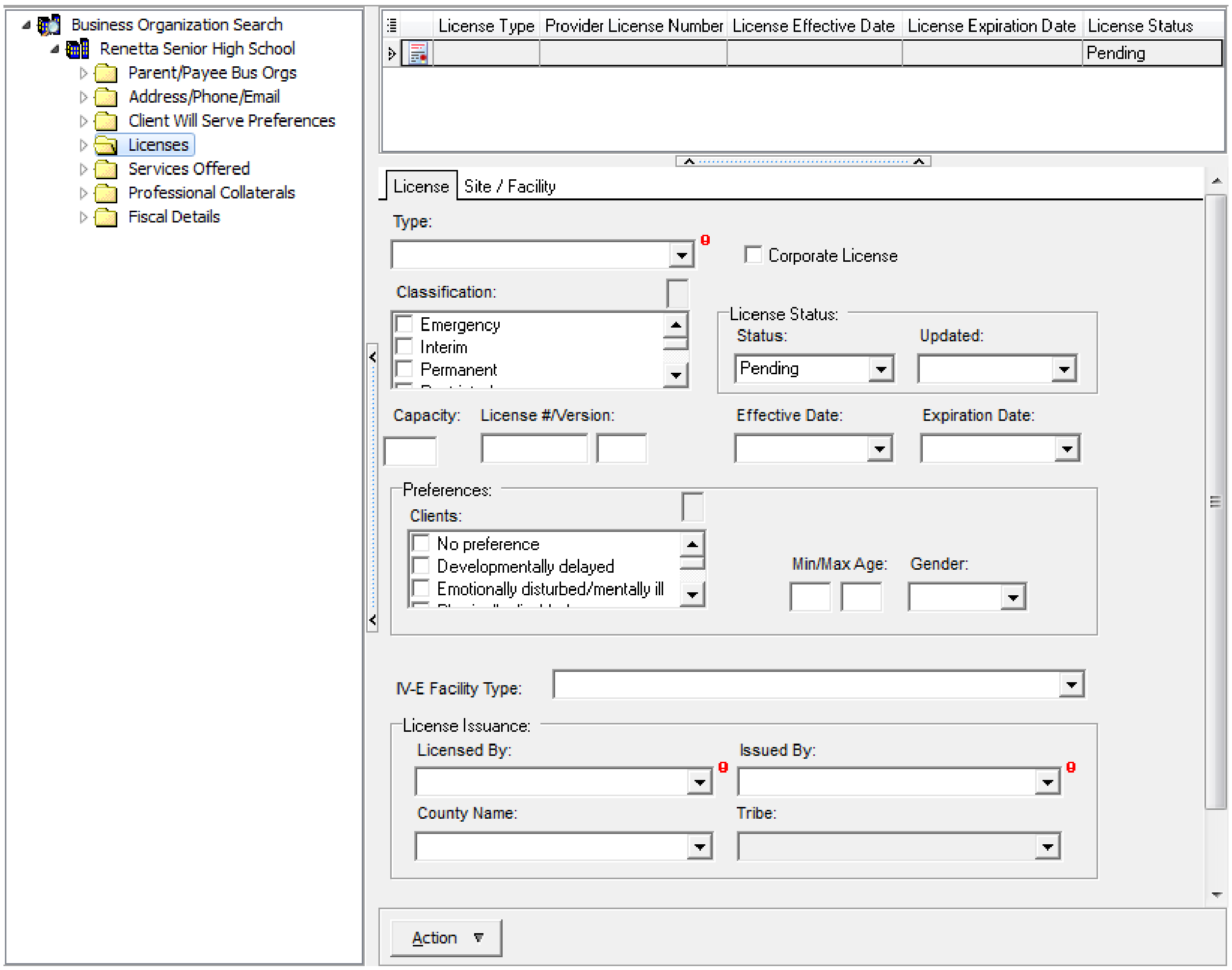
 *Best Practice: Social Workers should review the Client Will Serve Preferences screen prior to placing a child to minimize the need for relocating the child's placement.*

 *Hint: If more than one set of preferences exist for the Business Organization, enter each as a new preference, e.g., Emotionally disturbed/mentally ill and Physical disabled.*

Licenses Folder

License entry can be completed by using the licensing folder under the appropriate Business Organization for Business Organizations not licensed by your agency, e.g., Department of Human Services (DHS), Department of Corrections (DOC), and Department of Health (MDH). If the organization or foster care home is licensed by your agency, enter a Licensing workgroup.

License Screen



To Enter New License Information:

1. Select the **Licenses** folder and access the **Action** menu.
2. Select **New License**.
3. Complete all necessary and applicable fields.
4. Click **Save**.

Hints:

- *If your agency does not use a licensing workgroup for childcare licensing, enter license information here.*
- *If negative action was taken against a business organization (e.g., license suspended, revoked), that business organization must be inactivated once the last payment is paid. This ensures that no additional placement entries are made for the business organization. The counties use vendor import to inactivate business organizations, while tribes enter this information directly in SSIS.*
- *The Classification field is no longer valid and agencies are instructed to leave this field blank.*
- *Users can create a duplicate license to save time if the business organization has multiple licenses, e.g., a provider is licensed as both a child and adult foster home. Highlight the appropriate License under the Licenses folder, access the Action menu and Select Create Duplicate. Make necessary changes to the copied license and click Save.*

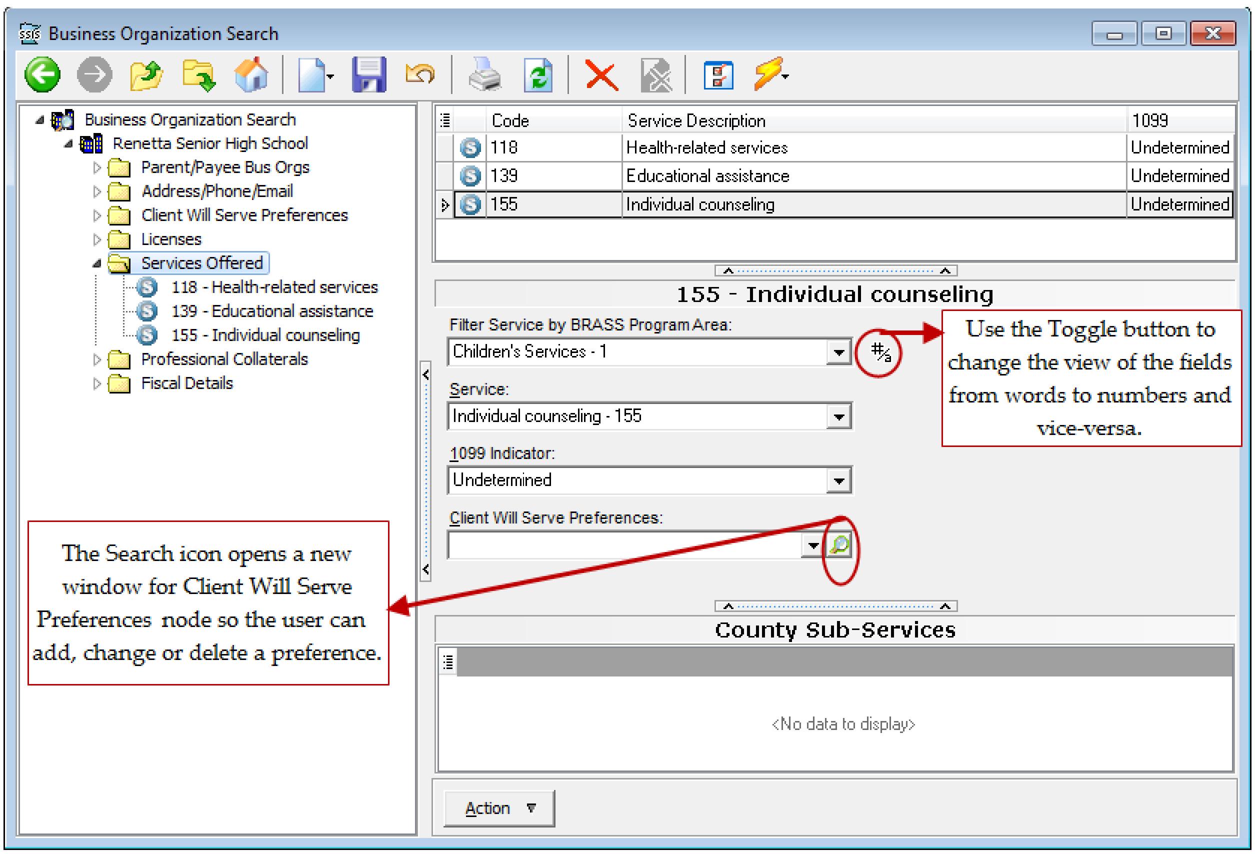
Reference: For Vendor Title IV-E Per Diem license entry and Title IV-E Per Diems for Group Facilities search, refer to the Fiscal New Worker Training Handout titled New Vendor in SSIS: Additional Entry.

Services Offered

Use the Services Offered folder to designate which services a business organization will provide. For example, users can:

- Enter 1099 information at the service level if the 1099 information on the business organization's record is not specific enough.
- Enter a business organization's preference on clients it is willing to serve at the service level by selecting an existing business organization Client Will Serve Preferences from the drop-down menu or create a new preference.
- Select a County Sub Service when the Service requires a County sub-service.

Services Offered



To Enter New Services Offered:

1. From the **Services Offered** folder, access the **Action** menu and select **New Services Offered**.
2. Enter a **Filter Service by BRASS Program Area** from the drop-down menu, if applicable.

3. Select the type of service from the **Service** drop-down menu.
4. Select the 1099 indicator from the **1099 Indicator** drop-down menu.
5. The **Client Will Service Preferences** drop-down menu displays the existing preferences entered. Click **Save**.

Hints:

- *For non-vendors, select No for the 1099 Indicator.*
- *If this warning message displays: "Warning! One or more County Sub-Services is required before this service can be used on payment or service arrangement," consult your SSIS Mentor/Coordinator to check SSIS Admin, Programs and Services to see if the County Sub-Service required field is set to yes for the BRASS service code, in error.*

Professional Collaterals Folder

From the Professional Collaterals folder, users can create new professional collaterals or associate existing professional collaterals.

Hint: When adding a new professional collateral from Business Organization node, employment entry and information is automatically created. Add detail information by clicking on Education/Employment information tab.

Reference: For additional information, see the Professional Collateral module.

Fiscal Details Folder

The Fiscal Details folder displays any existing service arrangements, service agreements, service arrangement groups, and payments associated with the business organization.

Reference: For additional information on Fiscal Details folder, see the Service Agreement, Service Arrangement, Service Arrangement Groups, and Payments tutorials, job aids, references and/or presentations.

Merge Business Organizations

Use the business organization merge function to combine duplicate business organization records into one record. Since there is no business organization clearing log that would capture potential duplicate records, workers must use standard search functions and enhanced grid features to recognize a potential duplicate business organization to merge. Once a duplicate has been identified, select the business organization entry to keep in the Tree View or grid and complete the merge process. Users responsible for merging business organizations must also have the Security Administration function of Merge Vendor.

Merge Screen

To Merge Business Organizations:

1. From **Business Organization** node the worker wants to keep, access the **Action** menu and select **Merge**.
2. The business organization selected displays in **Bus Org 1 (Keep)** field.
3. Click the **Search** button to the right of the **Bus Org 2 (Delete)** field and search for and select the business organization to delete.
4. Click the **Select** button to populate the **Bus Org 2 (Delete)** field.
5. Click the **Merge** button.
6. The **Business Organization Merge** dialog box displays listing changes/additions that will be made to the business organization.
7. Click **OK** to continue with the merge, or click **Cancel** to prevent the merge process.

Hint: The result of merging two vendor records into one record is that:

- *The Bus Org 2 is deleted.*
- *Addresses from the deleted business organization are added to Bus Org 1 as Other/Unknown.*
- *Phone numbers from the deleted business organization are added to Bus Org 1 as Other.*

- *Email addresses from the deleted business organization are added to Bus Org 1 as Work.*
- *If Bus Org 1 does not have a record for Foster Care/Day Care Provider, Client Will Serve Preferences, Services Offered, Person Work, Person School, Placement, Maltreatment Facility, Case, Contact Activity, License, Sub Bus. Org., etc., the record will be moved to Bus Org 1. If both business organizations have these records, the Bus Org 2 records may be deleted.*
- *If an imported vendor is selected as Bus Org 2 (Delete), that vendor cannot be eliminated using merge. If the vendor is "kept" (Bus Org 1), business organization can merge with non-vendor record.*
- *If a business organization was created in error, access the Action menu and select Delete.*
- *If a business organization is associated to any other records, then it cannot be deleted.*

Best Practice: Once merged, review the updated information to verify the changes are correct, e.g., the user should edit the record to reflect the appropriate type such as Mailing address instead of Other/Unknown.

Business Organization Detail Report

The Business Organization Detail report captures all related information on an individual business organization and is available for printing.

Business Organization Detail Report

Business Organization Detail

Business Organization Information		
Name: Renetta Senior High School		
Type: School	**County Vendor #:**	**MMIS Provider #:** 88777
Federal Tax ID: 445551	**Status:** Active	**Status Date:** 10/13/2009
Comments:		

No Individual Provider Information...

Phone(es)		
Phone Type	**Phone #**	**Comment**
Payment	(651) 222-2111	

E-mail(s)		
E-mail Type	**E-mail Address**	**Comment**
Work	RSHS@email.com	

Address(es)			
Type	**Effective Date**	**End Date**	**In Care Of**
Physical location	10/13/2009		
Address: 123 Main St N, Lakeland, MN 55511			
Directions/Comments:			

Professional Collaterals		
Name: Lucy Brown	**Field of Practice:** Audiologist	
Employment status:	**Description:**	
Schedule:	**Effective date:**	**End date:**
Name: Martha J	**Field of Practice:**	
Employment status:	**Description:**	
Schedule:	**Effective date:**	**End date:**
Name: Renetta Jo	**Field of Practice:** Therapist	
Employment status: Full time	**Description:**	
Schedule:	**Effective date:**	**End date:**
Name: Renetta Lolita	**Field of Practice:**	

To Print the Business Organization Detail Report:

1. From the business organization node in the Tree View, access the **Action** menu and select **Print Detail Report**.
2. Click the **Print** button.
3. Click the **X** to close the report and return to the business organization detail screen.

Resources

IV-E Group Facilities License Entry
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_136688.pdf

Licensed Provider (LNDX) Search
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_163947.pdf

Licensing
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008048

Participant Entry
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008068

Person Search
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008069

Professional Collateral Module
http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_008032

Payments Module
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_163447.pdf

Service Agreements
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_155911.pdf

Service Arrangements:

Advance Service Arrangement Search
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_163452.pdf

Service Arrangement Required Fields
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_155906.pdf

Service Arrangement Amendment
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_155910.pdf

Service Arrangement Groups
http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_155909.pdf

Vendor Records:

Changes to Vendor Import Settings

http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_059824

New Vendor Entry

http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_155907.pdf

Vendor Import Ongoing Maintenance

http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_FILE&RevisionSelectionMethod=LatestReleased&Rendition=Primary&allowInterrupt=1&noSaveAs=1&dDocName=dhs_id_054502

Vendor Entry

http://www.dhs.state.mn.us/main/groups/agencywide/documents/pub/dhs16_136687.pdf