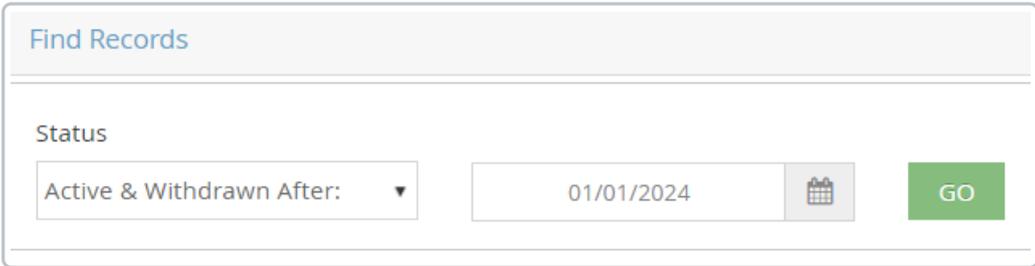


List Providers

Last Modified on 06/13/2024 1:39 pm
CDT

The List Providers window provides a list of all providers in your system that meet the criteria you specify. Note that any provider with a status of Wizard Incomplete does not display in this window, regardless of the filters you set.

1. From the menu to the left, click **Provider Management**.
2. Select **List Providers**. The List Providers window opens.
3. In the **Find Records** section, click the **Status** drop-down menu and choose from the following:
 - **Active:** List providers who are currently enrolled and claiming with your sponsorship. Providers set to Hold status also appear in the resulting list.
 - **Active and Withdrawn After:** List active providers and those who have been withdrawn after a certain date. If you select this option, click the corresponding Date box and enter the date (MM/DD/YYYY). This option also adds a Removal Date column to the resulting provider list.
 - **All:** List all providers, regardless of status. If you select this option, a Removal Date column is added to the resulting provider list.
 - **Hold:** List only those providers whose current status is Hold.
 - **Pending:** List only those providers whose current status is Pending.
 - **Withdrawn Before:** List only providers who have been withdrawn before a certain date. If you select this option, click the corresponding Date box and enter the date (MM/DD/YYYY). This option also adds a Removal Date column to the resulting provider list.



The screenshot shows a section titled "Find Records". Below the title, there is a "Status" label. Underneath, there is a dropdown menu currently displaying "Active & Withdrawn After:". To the right of the dropdown is a date input field containing "01/01/2024", followed by a calendar icon. To the far right is a green button with the text "GO".

4. Click **Go** and the list updates based on the status chosen.
5. To set additional filters, use the blank boxes at the top of each column. Click each box and enter the information by which to limit. The columns update automatically.

Number	Name	Status	Tier	Monitor
				JS
6454	Adams, Amy	Hold	1	JS
7902	Benson, Claudia	Active	1	JS
6383	Caster, Julie	Active	2	JS
6111	Espinoza, Ricardo	Active	1	JS
7900	Harrison, Xavier	Active	1	JS
8880	Johnson, Brooke Test	Active	1	JS
7903	Lambert, Phyllis	Active	2	JS
0607	Peters, Jay A	Active	1	JS

6. Click the  in the #, Name, Status, Tier, or Monitor column to sort information in ascending or descending order by that column. For example, if you click the Name column, the providers are sorted alphabetically by Name.

Number	Name	Status	Tier	Monitor	Removal Date
6454	Adams, Amy	Hold	1	JS	

7. You can do the following in this window:
- Click **Print** to generate and print the List Providers Report.
 - Click **Put On Hold/Take Off Hold** to change the provider's hold status.
 - Click **Remove** to remove the provider.
 - Click **Reactivate** to reactivate a removed provider.

Place Providers on Hold

If you place a provider on hold, each claim received for that provider is automatically placed on hold when the claim is processed. Providers and claims can be placed on hold independently of each other. For more information about claim holds, see [Claim Holds](#).

Note: Only those claims that have not already been processed are automatically placed on hold.

Placing Providers on Hold

1. From the **List Providers** screen, select your filters and click **Go**.

Number	Name	Status	Tier	Monitor	Removal Date	Actions
				JS		
6454	Adams, Amy	Hold	1	JS		<input type="button" value="Take Off Hold"/> <input type="button" value="Remove"/>
7902	Benson, Claudia	Removed	1	JS	06/13/2024	<input type="button" value="Reactivate"/> <input type="button" value="Remove"/>
6383	Caster, Julie	Active	2	JS		<input type="button" value="Put On Hold"/> <input type="button" value="Remove"/>
6111	Espinoza, Ricardo	Active	1	JS		<input type="button" value="Put On Hold"/> <input type="button" value="Remove"/>
7900	Harrison, Xavier	Active	1	JS		<input type="button" value="Put On Hold"/> <input type="button" value="Remove"/>

2. Click **Put On Hold** next to the provider to place on hold. The Place Provider On Hold dialog box opens.
3. Click the **Put On Hold Reason** box and enter the reason you are placing this provider on hold.

Place Provider On Hold ✕

Caster, Julie #6383

You have chosen to place this Provider on Hold. Doing so means that any claims being processed for this Provider will automatically be placed on Submission and Payment Hold, so that the Claim will be neither submitted to the state nor paid. When you wish to submit or pay that Claim, you will need to take the Claim and or the Provider off hold.

Note: Only claims that have NOT already been processed will be automatically be placed on hold, as above. To put a claim that has already been processed on hold, go to Claim >> Manage On Hold Claims.

If you wish to continue placing this Provider on Hold, please supply the following information and click Save below.

Put On Hold Reason

Provider will be closed for 2 months

Cancel
Save

4. Click **Save**.

Removing Providers From Hold

1. From the **List Providers**, click the **Status** drop-down menu and select **Hold**.
2. Click **Go**.
3. Click **Take Off Hold** next to the provider to remove from hold. The Remove Hold From Provider dialog box opens.

Number	Name	Status	Tier	Monitor	Removal Date	Actions
6454	Adams, Amy	Hold	1	JS		Take Off Hold Remove

4. Click **Yes**. The hold is removed.

Remove Providers

When your agency no longer services a provider, you must remove them. For example, you would remove those providers you've terminated or that have voluntarily discontinued the Food Program. Removing a provider retains data for that provider, but prevents them from logging in and submitting claims. All children for the removed provider are withdrawn effective the same date as the provider's removal date. You can always reactivate removed providers later.

Note: You can delete providers, but we recommend that you only do so if you've enrolled a provider in error. Deleting providers completely erases them (and their data) from your database forever. If a provider has recorded meals, you cannot delete them. For more information, see [Delete Providers](#).

To remove providers:

1. From the **List Providers**, use the **Status** drop-down and the blank boxes at the top of each column to filter and find the provider to be removed.
2. Click **Remove** next to the provider to remove. The Remove Provider dialog box opens.

Number	Name	Status	Tier	Monitor	Removal Date	Actions
				JS		
6454	Adams, Amy	Hold	1	JS		Take Off Hold Remove
7902	Benson, Claudia	Removed	1	JS	06/13/2024	Reactivate
6383	Caster, Julie	Active	2	JS		Put On Hold Remove
6111	Espinoza, Ricardo	Active	1	JS		Put On Hold Remove

3. Click the **Effective Date** box and enter the effective removal date.
4. Click the **Removal Reason** drop-down menu and select the reason why you are removing this provider. This list is populated by reasons you create. For more information, see [Manage Removed From System Reasons](#).
5. If you select Other Reason or do not select a removal reason, click the **Other Explanation** box and enter additional details about this removal.

Remove Provider ✕

Caster, Julie #6383

You have chosen to remove this provider. Doing so means that you are no longer this provider's Sponsor, and therefore will receive no further claims from this provider.

If you wish to continue removing this provider from your system, please supply the following fields.

Effective Date 📅

Removal Reason ▼

Other Explanation

6. Click **Save**.

Note: You can also remove providers in the Provider Information window. To do so, click **View** next to the provider in the List Providers window. The Provider Information window opens. Click **Remove**.

Reactivate Providers

If you have removed providers, you can reactivate them again later. When you reactivate removed providers, you also have the option to reactivate all of the provider's children who were withdrawn when you removed the provider. You can also reset the provider's original CACFP start date. This determines whether the provider shows up as a newly added provider on the Provider's Added report (and the California Change Request report).

To reactivate a provider:

1. From the **List Providers**, click the **Status** drop-down menu and select **Active & Withdrawn After** or **Withdrawn Before**.
2. Click the corresponding **Date** box and enter the date before or after which the provider was withdrawn.

Status

Withdrawn Before: 06/14/2024 📅 GO

3. Click **Go**.
4. Click **Reactivate** next to the provider you are reactivating. The Reactivate Provider dialog box opens.

Number	Name	Status	Tier	Monitor	Removal Date	Actions
7902	Benson, Claudia	Removed	1	JS	06/13/2024	Reactivate

5. Click the **Effective Date** box and update the provider's original CACFP start date, if needed. This will replace the value in the Original CACFP Start Date box in the Provider Information window.
6. Check the **Reactivate Children Withdrawn with Provider** box to reactivate all of the provider's withdrawn children when you reactivate the provider.

Reactivate Provider ✕

Benson, Claudia #7902

You have chosen to reactivate the provider. Doing so means that you will once again be processing claim information for this provider.

If you wish to continue reactivate this provider, please click continue. Otherwise, click Cancel.

Effective Date 10/01/2023 📅

Note: the date you choose here will be assigned to the Provider's Original CACFP StartDate, replacing the value currently in that field.

Reactivate children withdrawn with Provider

Cancel
Continue

7. Click **Continue**.
8. Click **OK** at the confirmation prompt.