MASSACHUSETTS
Department of
Early Education and Care

Licensing and Education Analytic Database - LEAD

Phase 3 Launch Guidance Manual

Version 1 – Released 7/24/2018

Purpose of this Manual

The purpose of this Launch Guidance Manual is to provide licensing and administrative staff with information regarding commonly-used features in LEAD. This guide will not be all-encompassing of every transaction in LEAD, but is intended to hit the general points to assist EEC staff with processing transactions and other activities within LEAD for the launch of Phase 3.

This manual is a living document, meaning that the LEAD team will continue to add sections during and after the Phase 3 rollout. This way, we can add additional guidance in response to user feedback obtained through interfacing with LEAD Phase 3.

Overview

LEAD is EEC's cloud-based licensing database, built on the Salesforce.com platform. Salesforce is a global web-based software and cloud computing company. Available to EEC staff members and licensed providers, LEAD is a cloud computing platform that will house all of EEC's licensing data, and will be the system of record for all licensing data. LEAD Phase 3 will allow providers to apply for licenses and complete licensing transactions online through the EEC LEAD Provider Portal ("LEAD Portal").

LEAD will allow licensors to access all licensing information at any time in any location. LEAD will also allow Field Operations leadership access to timely information regarding licensing activity. LEAD will continue to evolve to keep up with regulatory and procedural changes to licensing and oversight. LEAD will sync with other EEC applications to ensure that all EEC applications have current and up-to-date information regarding licensed programs. LEAD will be instrumental in achieving the goal of ensuring that all data is integrated to better inform decision-making and licensure activities.

Table of Contents:

This Phase 3 Launch Guidance Manual currently covers the following topics:

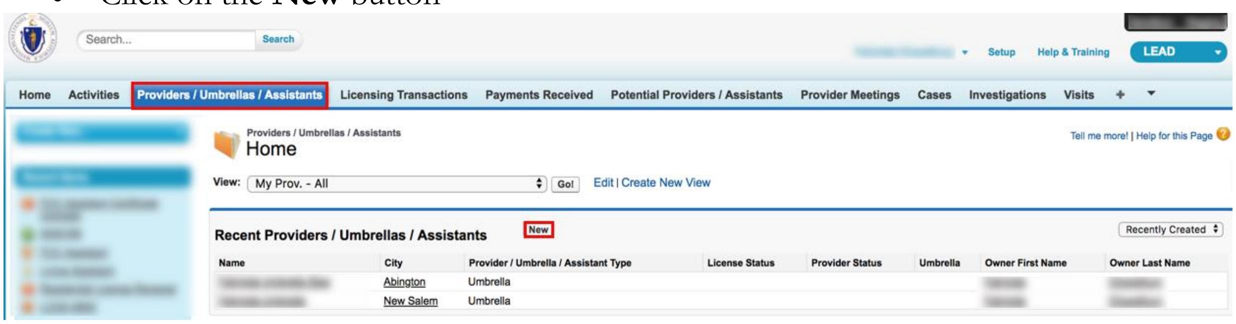
I. Creating a New Provider Record

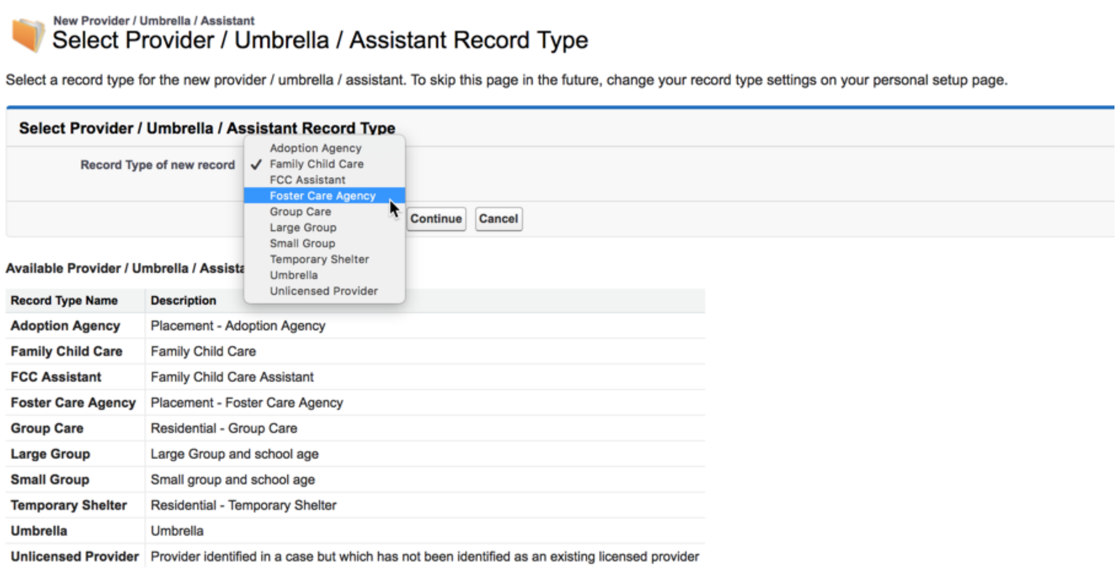
Note: This section does not apply to unlicensed FCC providers and new FCC license applicants who signed up for a Potential Provider Meeting ("PPM") through LEAD. For FCC providers who signed up for a PPM through LEAD, refer to the "Provider Meetings" section.

EEC staff should search for existing provider information in LEAD before creating a new record in order to ensure data quality and avoid duplicate records. As the system continues to progress, additional guard rails will be in place to guide the users to avoid duplicate data quality issues. The global search at the top of the LEAD application can be utilized to search for existing records. If, after searching for the provider record, it is determined that a new provider is needed, follow the steps below:

Ensure you are on the LEAD application which is indicated in the upper right corner.

- Navigate to the **Provider/Umbrella/Assistants** tab
- Click on the **New** button



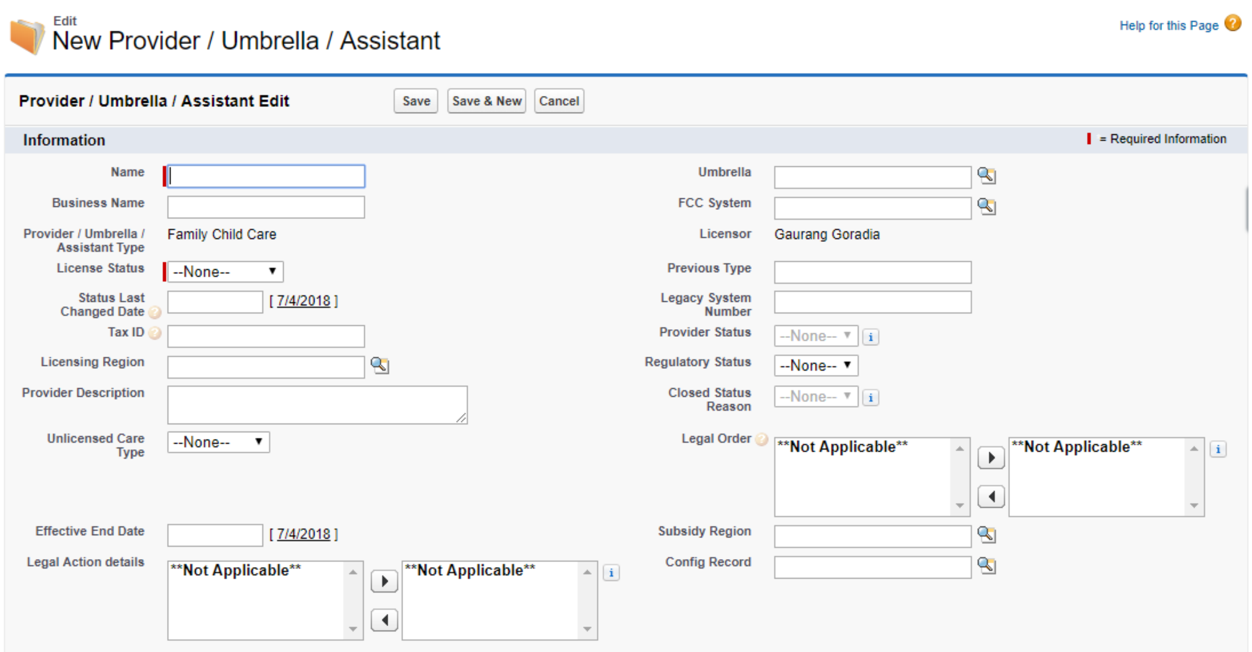


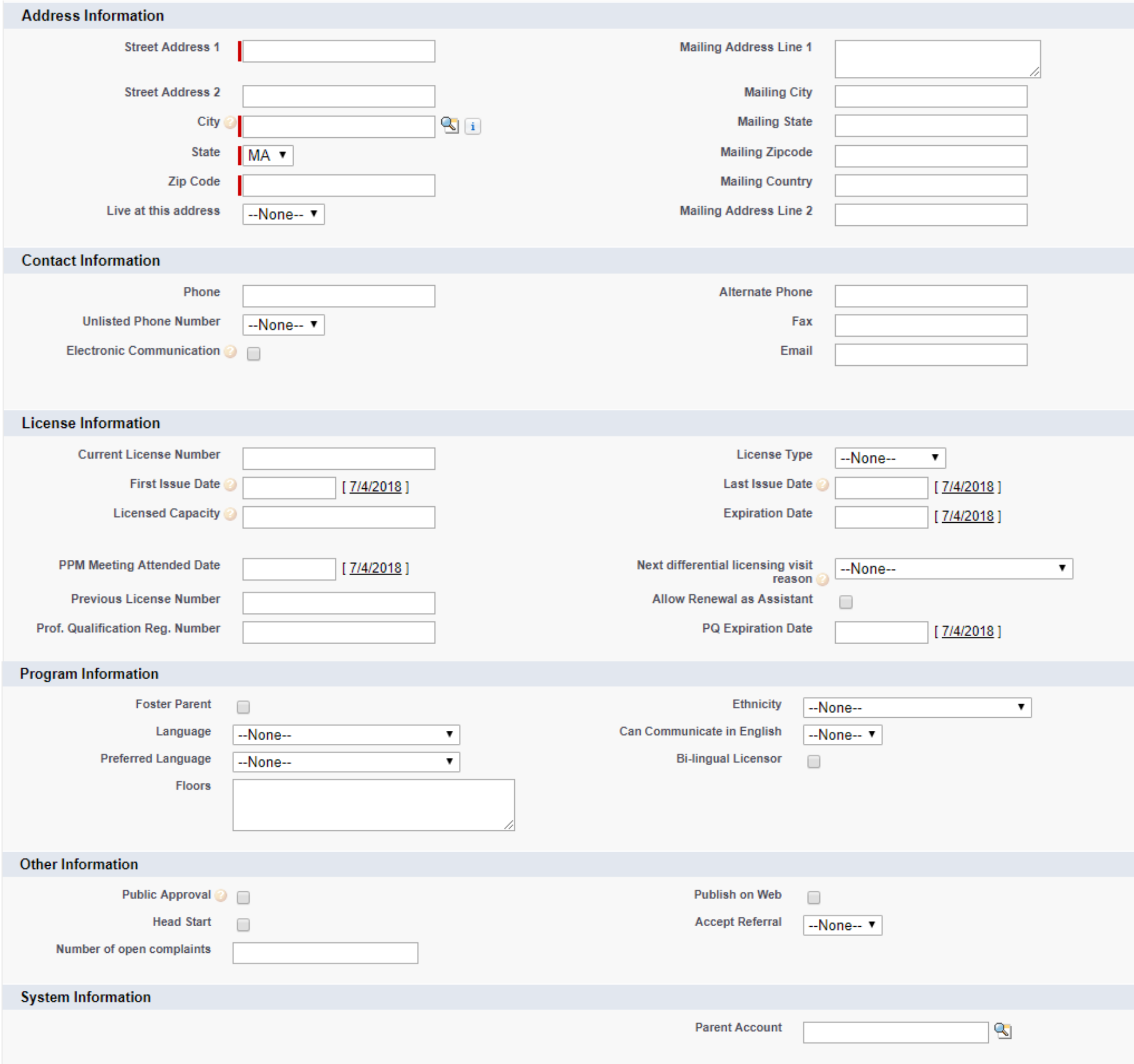
- Select a record type that fits your desired program type, then click **Continue**
- Populate all the required fields for each section

Available Provider / Umbrella / Assistant Record Types

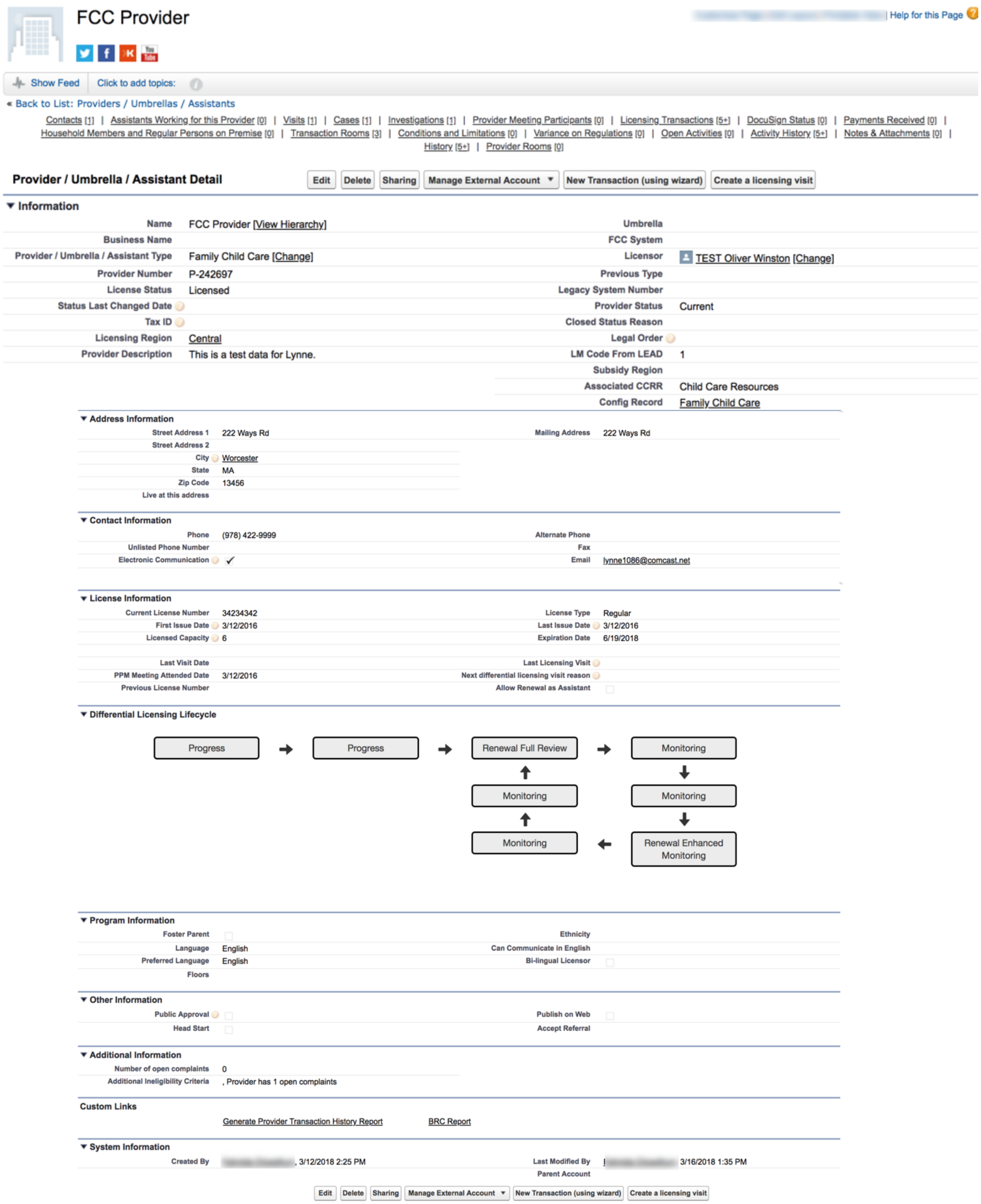
Record Type Name	Description
Adoption Agency	Placement - Adoption Agency
Family Child Care	Family Child Care
FCC Assistant	Family Child Care Assistant
Foster Care Agency	Placement - Foster Care Agency
Group Care	Residential - Group Care
Large Group	Large Group and school age
Small Group	Small group and school age
Temporary Shelter	Residential - Temporary Shelter
Umbrella	Umbrella
Unlicensed Provider	Provider identified in a case but which has not been identified as an existing licensed provider

Note: Depending on the record type the user chooses to create, the page may look different and may have different fields. Any field highlighted in red is a required field.





- Once done populating all the required fields, click **Save** at top of the page to create the record. Upon saving the record, you will be redirected to the provider record as shown below. Please note that "licensor" field will default to the person creating the record. This will likely need to be changed if an admin or person other than the licensor is creating the record.



FCC Provider

Help for this Page

Show Feed | Click to add topics:

« Back to List: Providers / Umbrellas / Assistants

Contacts [1] | Assistants Working for this Provider [0] | Visits [1] | Cases [1] | Investigations [1] | Provider Meeting Participants [0] | Licensing Transactions [5+] | DocuSign Status [0] | Payments Received [0] | Household Members and Regular Persons on Premise [0] | Transaction Rooms [3] | Conditions and Limitations [0] | Variance on Regulations [0] | Open Activities [0] | Activity History [5+] | Notes & Attachments [0] | History [5+] | Provider Rooms [0]

Provider / Umbrella / Assistant Detail — Edit | Delete | Sharing | Manage External Account | New Transaction (using wizard) | Create a licensing visit

Information

Name	FCC Provider [View Hierarchy]	Umbrella	
Business Name		FCC System	
Provider / Umbrella / Assistant Type	Family Child Care [Change]	Licensor	TEST Oliver Winston [Change]
Provider Number	P-242697	Previous Type	
License Status	Licensed	Legacy System Number	
Status Last Changed Date		Provider Status	Current
Tax ID		Closed Status Reason	
Licensing Region	Central	Legal Order	
Provider Description	This is a test data for Lynne.	LM Code From LEAD	1
		Subsidy Region	
		Associated CCRR	Child Care Resources
		Config Record	Family Child Care

Address Information

Street Address 1	222 Ways Rd	Mailing Address	222 Ways Rd
Street Address 2			
City	Worcester		
State	MA		
Zip Code	13456		
Live at this address			

Contact Information

Phone	(978) 422-9999	Alternate Phone	
Unlisted Phone Number		Fax	
Electronic Communication	✓	Email	lynne1086@comcast.net

License Information

Current License Number	34234342	License Type	Regular
First Issue Date	3/12/2016	Last Issue Date	3/12/2016
Licensed Capacity	6	Expiration Date	6/19/2018
Last Visit Date		Last Licensing Visit	
PPM Meeting Attended Date	3/12/2016	Next differential licensing visit reason	
Previous License Number		Allow Renewal as Assistant	

Differential Licensing Lifecycle

Progress → Progress → Renewal Full Review → Monitoring

Monitoring → Monitoring → Renewal Enhanced Monitoring → Monitoring → Monitoring → Renewal Full Review

Program Information

Foster Parent		Ethnicity	
Language	English	Can Communicate in English	
Preferred Language	English	Bi-lingual Licensor	
Floors			

Other Information

Public Approval		Publish on Web	
Head Start		Accept Referral	

Additional Information

Number of open complaints	0
Additional Ineligibility Criteria	, Provider has 1 open complaints

Custom Links

Generate Provider Transaction History Report | BRC Report

System Information

Created By	[redacted], 3/12/2018 2:25 PM	Last Modified By	[redacted] 3/16/2018 1:35 PM
		Parent Account	

Edit | Delete | Sharing | Manage External Account | New Transaction (using wizard) | Create a licensing visit

II. Creating a New Program Contact

There are two primary reasons to create and update contacts in LEAD:

1. Giving someone portal access for the first time; and
2. Updating contacts for a currently-licensed program outside of a transaction.

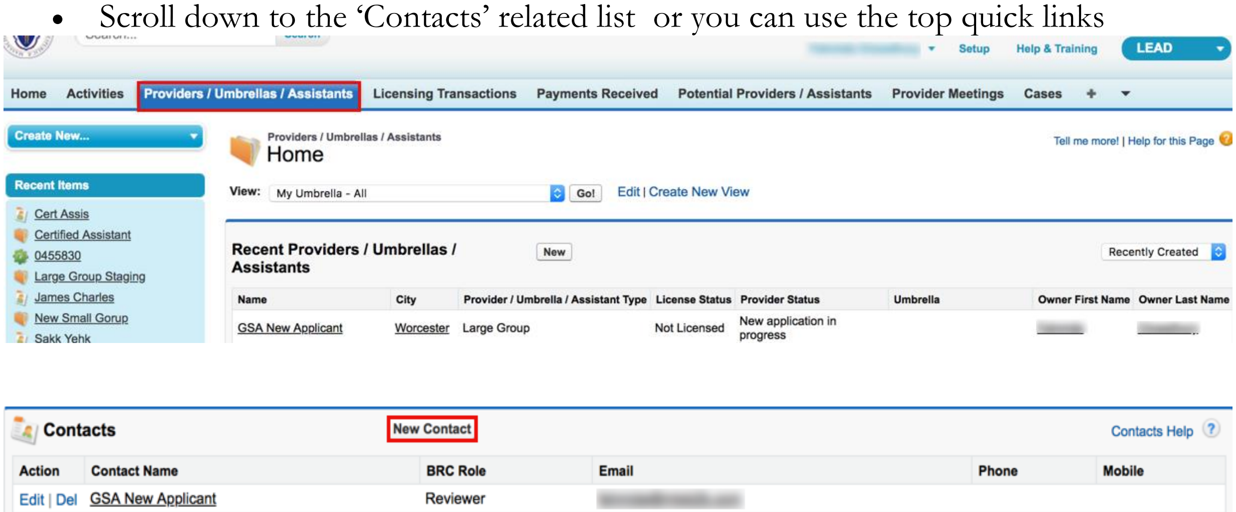
Programs will be responsible for creating and managing all other contacts by submitting a transaction through the LEAD Portal. For Family Child Care, a new contact would be created by the provider for background record check purposes: addition of a new household member or person regularly on the premises. For Group and School Age and Residential and Placement Programs, the program can create a new contact through the "apply for background check" transaction or "change in administrative authority" transaction.

To create a new contact record for a provider, the user must locate the provider record using any one of these methods:

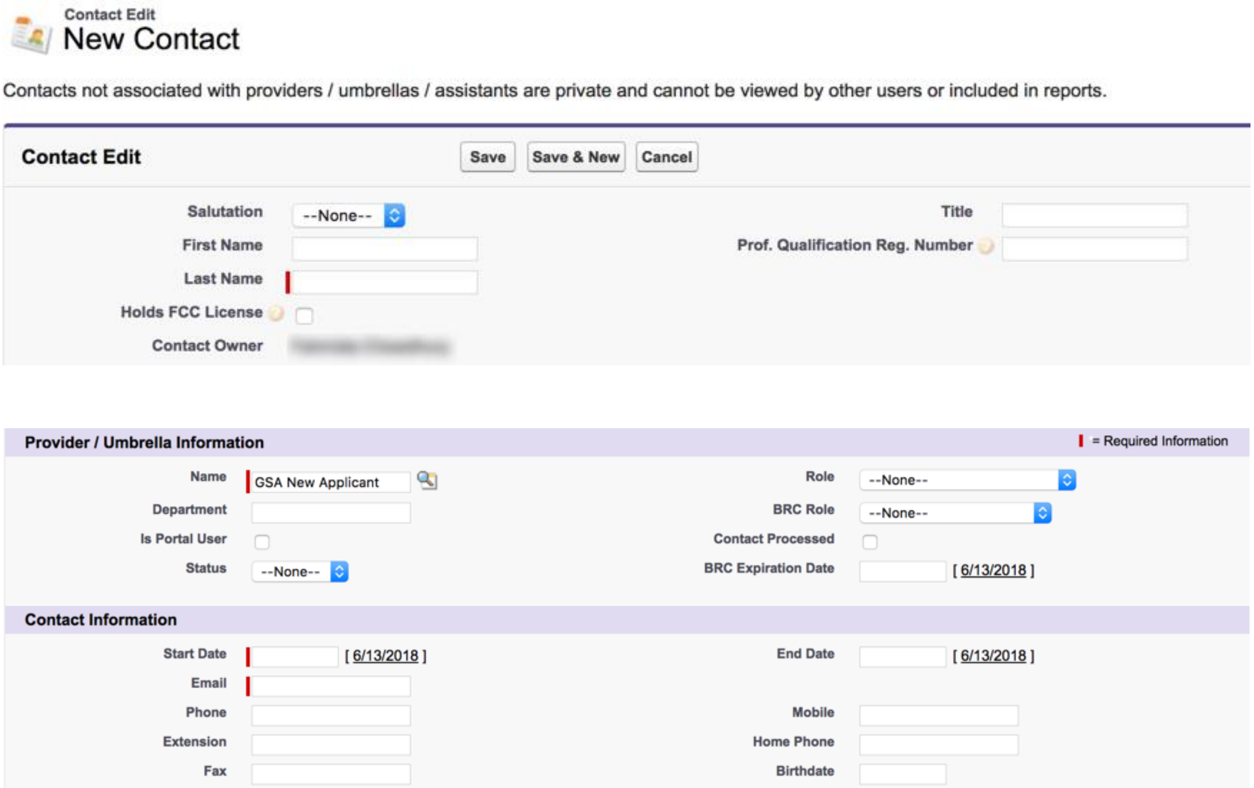
- Global search at the top of the LEAD application
- List view in **Provider/Umbrella/Assistants** tab
- Recently visited records in **Provider/Umbrella/Assistants** tab
- Reports

Once you have located the provider record, follow the instruction below to add a new contact.

- Scroll down to the 'Contacts' related list or you can use the top quick links



- Click on New Contact button that will bring up the contact data entry form.
- Enter all of the required contact information

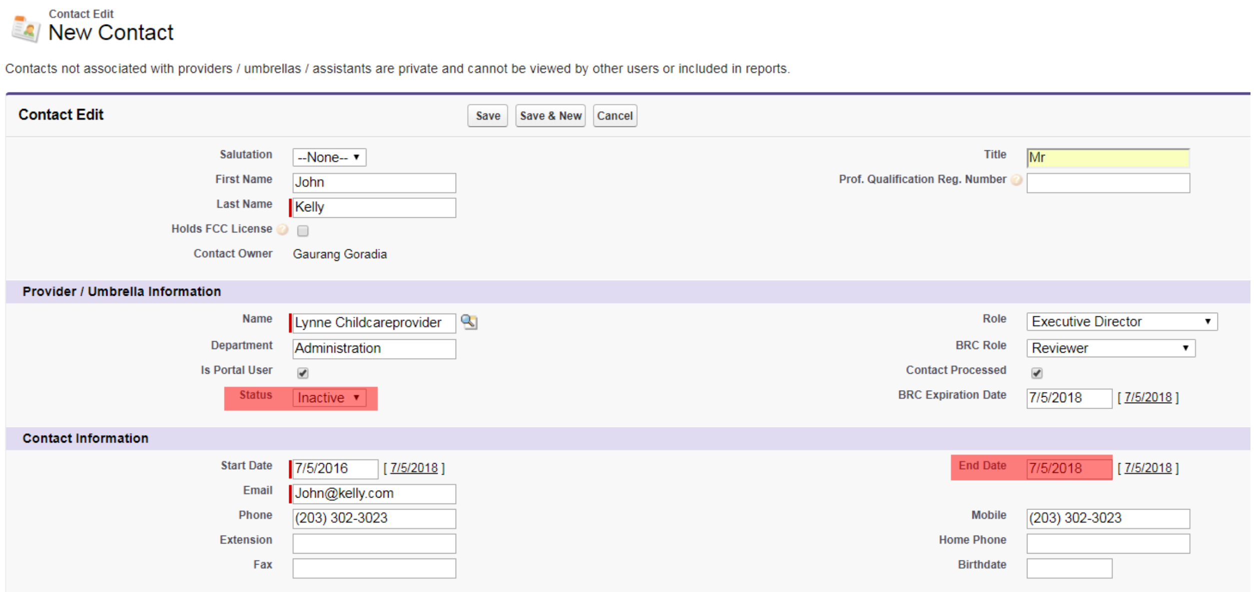


The user will be asked to provide data for the following fields:

- First Name
- Last Name
- Provider Name
- Start Date
- End Date: Populate this field with the appropriate date if you need to terminate a contact from the program after a set period of time.
- Email
- Status: Contacts created internally must have a status of 'Active' selected to receive BRC Consent forms during transactions.
- Role: Select the applicable role of that contact on that program
- BRC Role: Select the BRC role of the contact on that program. BRC Consent Forms will be triggered based on the BRC role selection.

III. <u>Marking a Contact "Inactive"</u>

You can mark a program contact inactive when you learn the contact is no longer actively involved with the program. In order to mark a contact as inactive, you will need to input an end date on the contact record and select the "inactive" value for the "status" field.

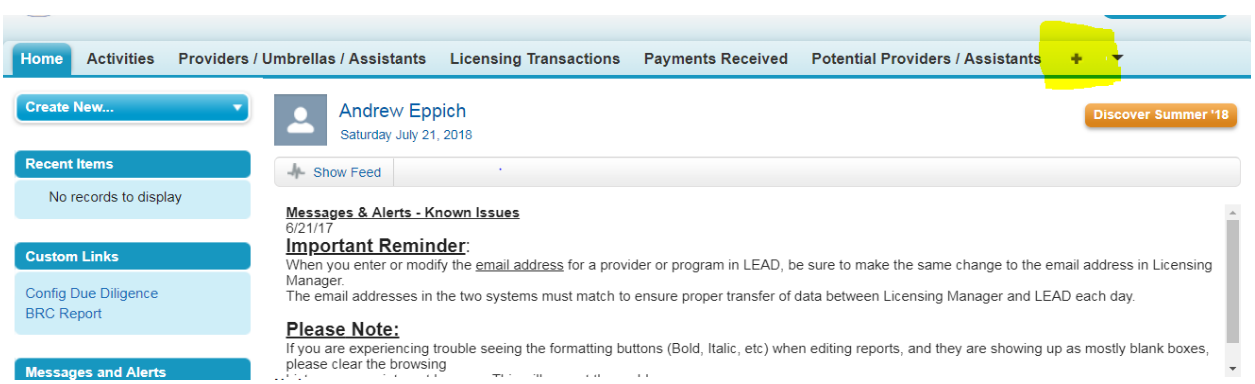


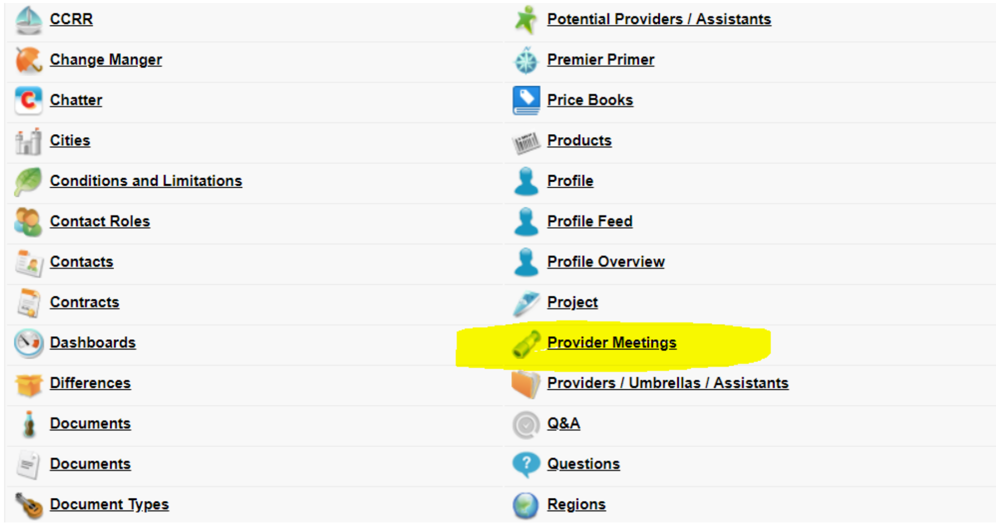
IV. Provider Meetings – FCC Potential Provider Meetings and GSA Renewal Meetings

A prospective family child care provider must attend a Potential Provider Meeting ("PPM") before they can be granted LEAD Portal access and submit an application for a family child care license. In addition, EEC staff can manage GSA Renewal Meetings through LEAD.

To create a new Provider Meeting:

1. Navigate to the "Provider Meetings" tab. If you cannot locate the "Provider Meetings" tab, click on the "+" sign on the top bar and locate the "Provider Meetings" field on the next screen:





2. Once on the Provider Meetings screen, click "New"
3. On the New Provider Meeting screen, add all of the required fields and save.
4. To add Provider Meeting participants:
   - From the 'Provider Meeting Participants' related list, click on the 'New Provider Meeting Participant' button.
   - To Add a Participant, search to see if the provider or contact already exist in LEAD by searching in the Keyword field. The search can also be filtered down by License Status and Provider Status.
     - Helpful hints:
       1. If you are searching for a Family Child Care PPM participant, search for the provider by name. If you find a FCC Assistant who is already in the LEAD system who is attending a PPM in order to become a provider, please follow the instructions below and create a new contact for him or her, in order to create a Provider record in LEAD. Do not add him or her to the PPM using her assistant record.
       2. If you are searching to add a participant to a GSA Renewal meeting, search for the Program name, not the contact name. When the Program is found in LEAD, you will be able to see all the contacts and choose a person to register for the meeting.
   - Click on the 'Search' button for the results to get listed under the 'Provider with Contacts' section. The result of the search will show existing Providers in LEAD.
   - To reset the search, click on the 'Reset Button'
   - After the first search, users will see the option to 'Create a new Contact' above the 'Provider with Contacts' section.
     - If the Participant does not exist in LEAD, click on 'Create a new Contact' and enter the required information
   - Once saved, the contact will be added as a participant of the PPM
   - To add an existing contact, select a provider from the list, click on the Provider to expand, and click on 'Add Participant' to add the contact to the PPM.
   - If the listed contacts has already been added, they will be marked as 'Registered for Meeting'

- To go back to the Provider Meeting page, please click on the blue 'Back To Provider Meeting' link from the top of the page.

V. Managing Transactions in LEAD and the Due Diligence Checklist

LEAD Phase 3 will allow licensors and administrative staff to manage all licensing transactions within LEAD. LEAD will allow providers to submit transactions through the LEAD Portal, including:

Family Child Care:

- New Application
- Renewal Application
- Change of Address
- Change of Provider Name
- Change of Household Composition
- Change of Licensed Room
- Inactive Request
- Re-active Request
- License Upgrade
- License Downgrade
- FCC Assistant New Application
- FCC Assistant Renewal Application
- FCC Assistant Certification Upgrade
- Variance Request

Group and School Age Child Care:

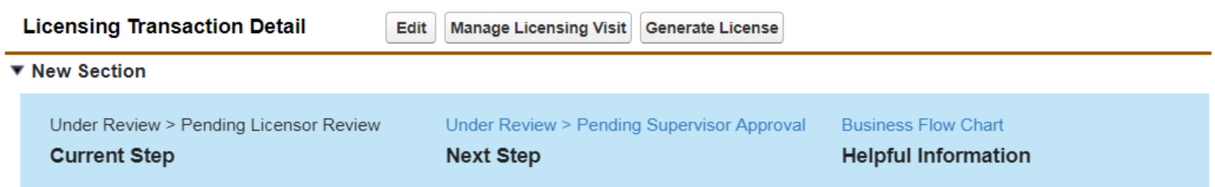
- New Application
- Renewal Application
- Move
- License Change, including Change in Capacity or Change in Groupings
- Change in Administrative Authority
- Variance Request

Residential and Placement Programs:

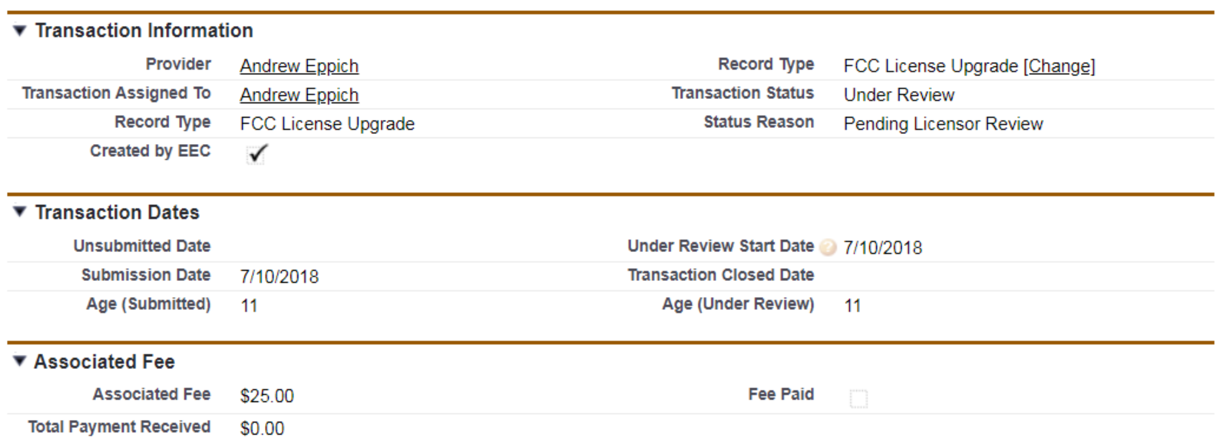
- New Application
- Renewal Application
- Move
- License Change, including Capacity Change or Change in Program Characteristics

- Change in Administrative Authority
- Variance Request

The Licensing Transaction screen has a wealth of information for each transaction and is simple to use. At the top of each Licensing Transaction Detail screen, a user can easily locate the status of the current transaction, as well as the next step to be completed:



In addition, transaction information can be located at the top of the page as well:



The heart of managing transactions in LEAD is the Due Diligence Checklist. In essence, the Due Diligence Checklist sets forth all of the required tasks to be completed by the licensee, administrative staff, licensor, and supervisor in order to complete the transactions. Each transaction will have a different Due Diligence Checklist, as there are different requirements for each transaction.

A typical Due Diligence Checklist will look something like this:

Due Diligence Checklist

Automated | Help Text | Video Instruction

Edit

Checklist Item	Responsible Party	Status	Completion Date	Completed By
Submit Tax Certification form	Provider	Completed	7/10/2018 3:13 PM	Andrew Eppich
Submit application fee payment	Provider	Completed	7/10/2018 3:13 PM	Andrew Eppich
Review and enter application fee payment [Alert: Expected payment is not reflected.]	Admin	Not Applicable	7/10/2018 3:13 PM	Andrew Eppich
Return check back to provider (if applicable)	Admin	Completed	7/10/2018 3:13 PM	Andrew Eppich
Review all documents	Licensor	Completed	7/10/2018 3:13 PM	Andrew Eppich
Visit association to this transaction	Licensor	Completed	7/10/2018 3:24 PM	Andrew Eppich
Review Indoor/outdoor space, safe and sufficient square footage	Licensor	Pending		

Notice there are a number of icons that are associated with each item:

- The **blue** icon indicates that the item is automated. Once the responsible party completes the task within LEAD, these checklist items will be marked as **'Completed'** automatically.
- The **orange question mark** icon indicates the checklist items has help text. Help text will appear when you hover your mouse over the icon.
- The **red video** icon indicates the checklist item will have a video link for more instructions.

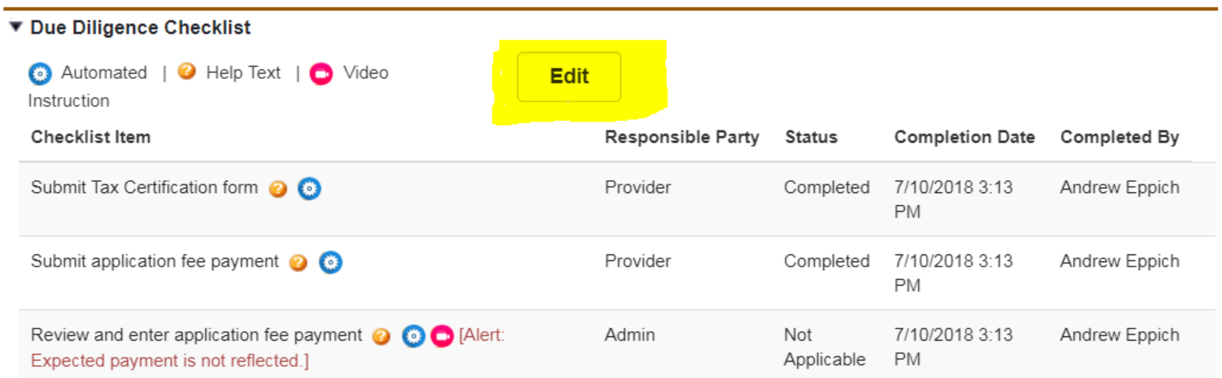
The column headers on the Due Diligence Checklist represent the following:

- **Checklist Item:** Describes the due diligence item to be completed
- **Responsible Party:** Describes which party is responsible for completing the due diligence item. The possible responsible parties are:
  - **Provider:** The provider is responsible for completion of this item though the LEAD Portal.
  - **Admin:** The EEC Administrative Staff is responsible for completion of this item.
  - **Licensor:** The licensor is responsible for completion of this item.
  - **Supervisor:** The licensor's supervisor is responsible for completion of this item.
- **Status:** Displays the current status of the due diligence item. Possible statuses are:
  - **Completed:** The due diligence item is complete.
  - **Pending:** The due diligence item is incomplete.
  - **Not applicable:** The due diligence item does not need to be completed and is not applicable for this particular transaction. Not applicable is unavailable for certain due diligence items.

- **Completion Date:** Displays the completion date of the due diligence item and is automatically updated.
- **Completed By:** Displays the person that completed the due diligence item.

In order to process a transaction, you must locate the transaction in the Licensing Transactions on the provider record. Clicking on the licensing transaction number will bring you to the Licensing Transaction Detail page.

In order to update an item on the Due Diligence Checklist, click on the "edit" button at the top of the checklist:

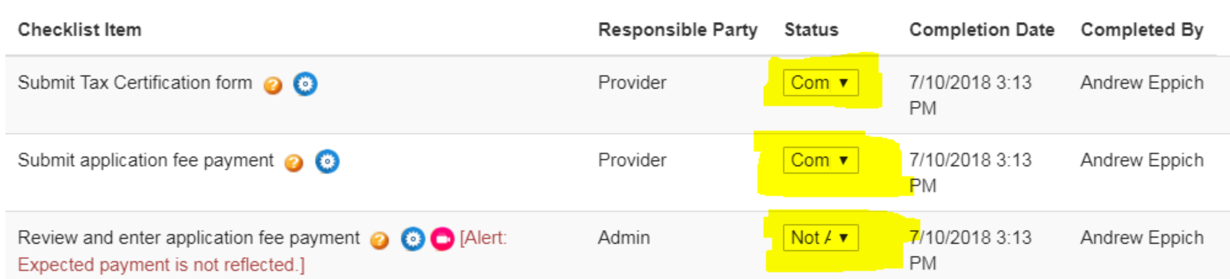

▼ Due Diligence Checklist

Automated | Help Text | Video Instruction

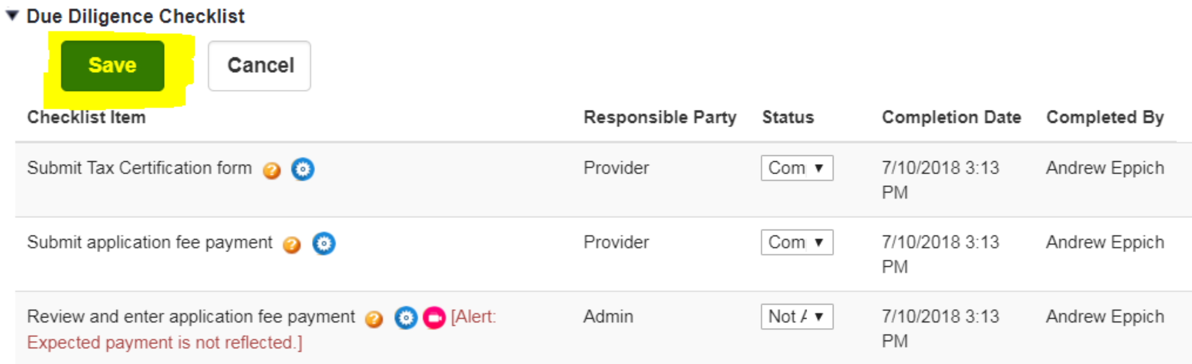
Edit

Checklist Item	Responsible Party	Status	Completion Date	Completed By
Submit Tax Certification form	Provider	Completed	7/10/2018 3:13 PM	Andrew Eppich
Submit application fee payment	Provider	Completed	7/10/2018 3:13 PM	Andrew Eppich
Review and enter application fee payment [Alert: Expected payment is not reflected.]	Admin	Not Applicable	7/10/2018 3:13 PM	Andrew Eppich

After clicking "edit", the Status fields will become drop-down menus:


Checklist Item	Responsible Party	Status	Completion Date	Completed By
Submit Tax Certification form	Provider	Com ▾	7/10/2018 3:13 PM	Andrew Eppich
Submit application fee payment	Provider	Com ▾	7/10/2018 3:13 PM	Andrew Eppich
Review and enter application fee payment [Alert: Expected payment is not reflected.]	Admin	Not / ▾	7/10/2018 3:13 PM	Andrew Eppich

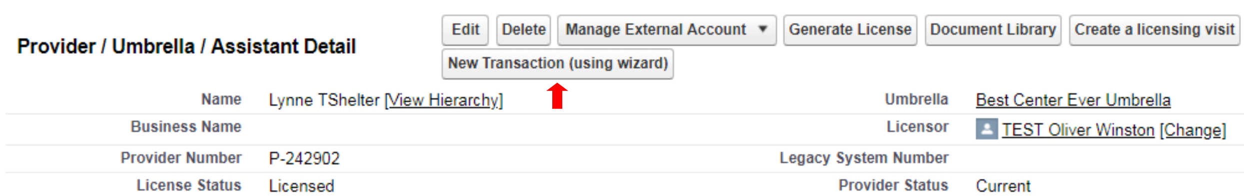
The status of the due diligence item can then be updated. Make sure to click save after updating due diligence items:



VI. Adding Transactions Using the Wizard

When a provider has been granted an accommodation[1] from using the LEAD Portal to submit transactions to EEC, paper applications need to be entered into LEAD by EEC admin staff. These applications and transactions will be added using a feature called the "Wizard."

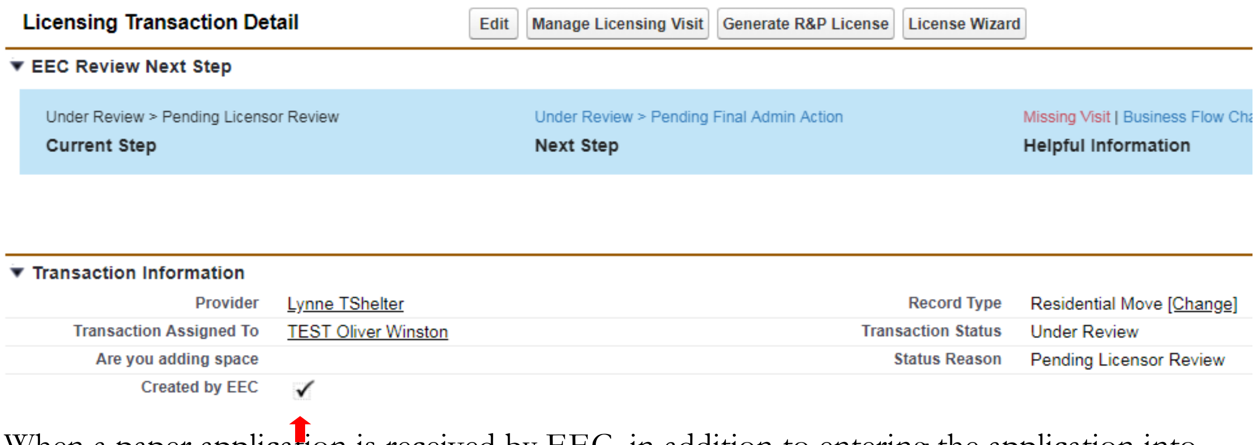
To add a paper application to a provider's record, navigate to the Provider's record in LEAD. At the top of the screen, find the button named "New Transaction (using wizard)".



Clicking on this button will bring you to a page that looks identical to the LEAD Portal page for submission of a transaction. From here, you can begin any transaction that is available to this provider. The new paper applications match the LEAD transaction screens almost exactly, so you will be able to navigate your way through the paper application and the LEAD transaction screens with ease.

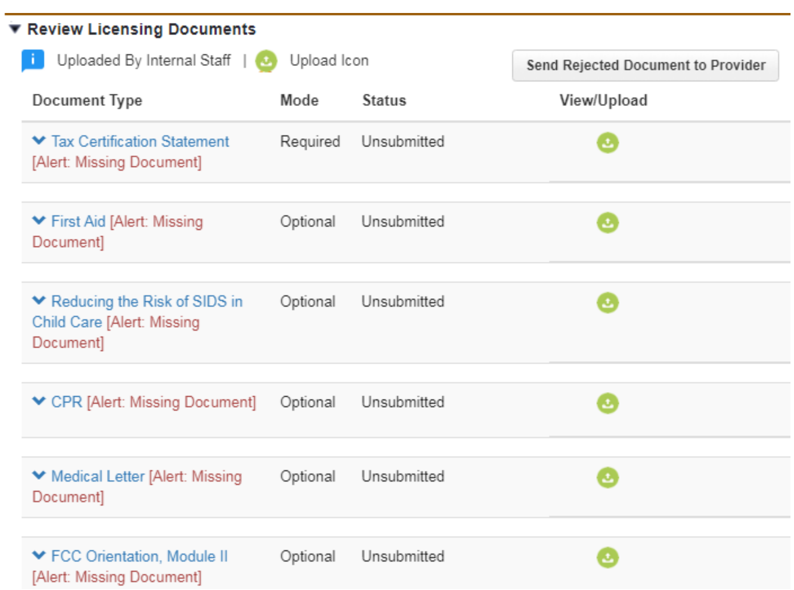
When you are done entering the transaction and click Submit, the transaction will be marked in LEAD as having been "Entered by EEC". This will differentiate the transaction from others that have been entered by a provider from the LEAD Portal.

[1] See Licensing Procedure LPRO-18-005.



When a paper application is received by EEC, in addition to entering the application into LEAD using the Wizard, any required documents related to the transaction that are submitted by the provider will also need to be entered into LEAD. This will include items such as training certificates, medical forms, tax certification documents, BRC forms, etc.

For FCC providers and assistants, the required documents can be found on the transaction page, in the "Review Transaction Document" section of the transaction. Each required document needs to be scanned and uploaded individually into its proper area:

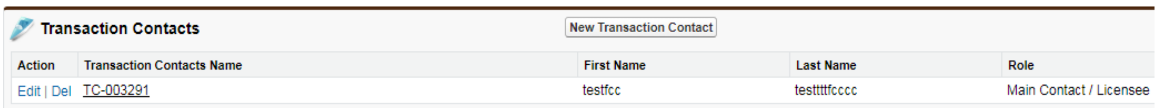


For GSA and R&P providers, each document will need to be scanned and uploaded into the provider's document library, on behalf of the provider.

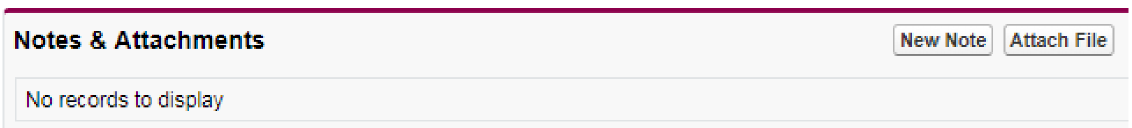
The BRC forms for transactions processed using the Wizard need to be scanned and uploaded. It is recommended to scan and upload each BRC form individually.

Locate the "Transaction Contacts" section on the transaction page for the transaction you are processing through the Wizard. For FCC, you will see a line for the provider and each of his or her household members and persons regularly on the premises. For GSA and R&P programs, you will see each program contact.

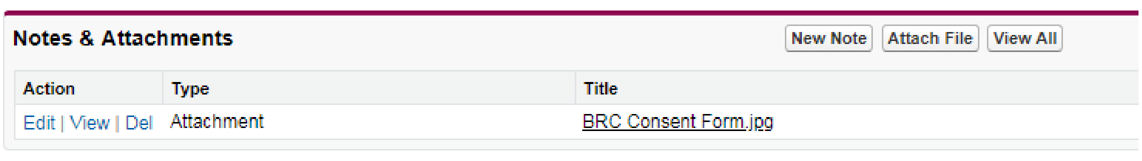
For each person who is required to submit a BRC form, click on the link in the Transaction Contacts Name column:



Scroll to the "Notes & Attachments" section, click "Attach File", and follow the steps to attach and upload the scanned BRC consent form for this contact:



When you are done, you will be able to see the file in the Notes and Attachments section:

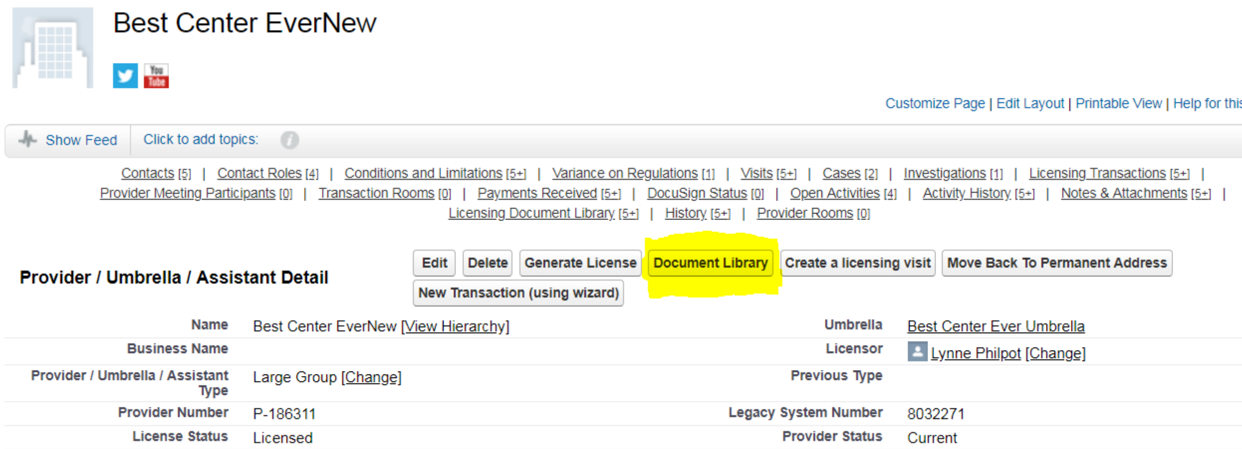


When the BRC forms for all of the contacts have been uploaded, the Provider's BRC Due Diligence item will be automatically marked as Completed.

VII. Using the Document Library (GSA and R&P Only)

LEAD Phase 3 now features the Document Library for Group and School Age and Residential and Placement programs. Using the Document Library, EEC staff will be able to view and approve documents submitted by the provider.

EEC staff can view a program's document library within the provider record by clicking on the Document Library button at the top of a GSA or R&P program's provider page:



Best Center EverNew

Customize Page | Edit Layout | Printable View | Help for this

Show Feed | Click to add topics:

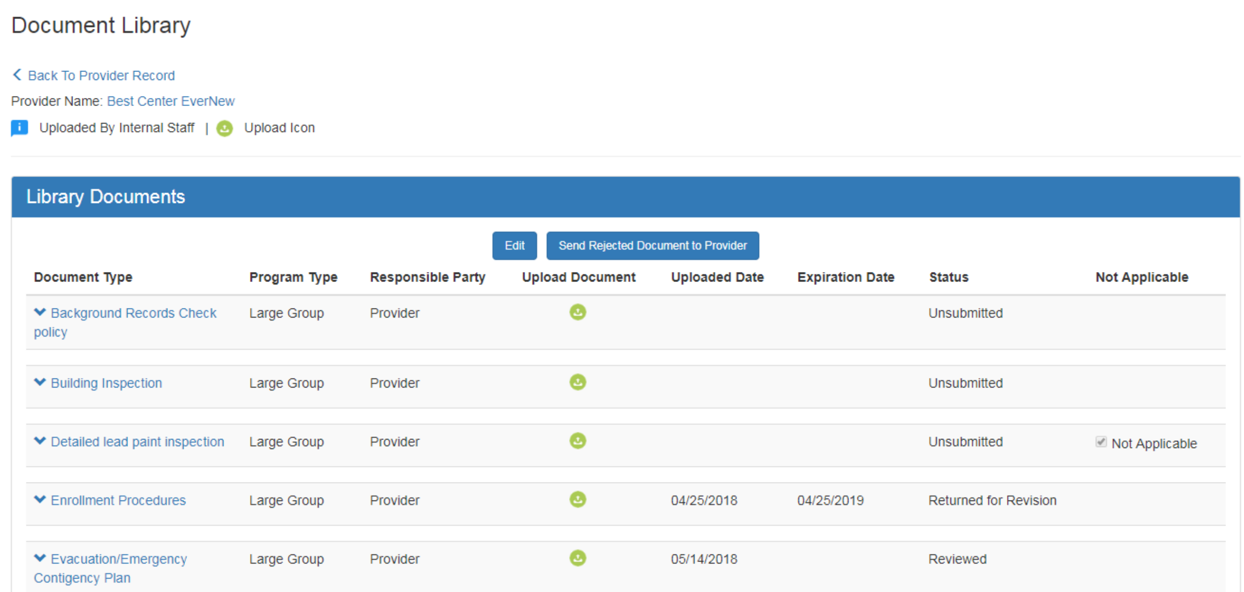
Contacts [5] | Contact Roles [4] | Conditions and Limitations [5+] | Variance on Regulations [1] | Visits [5+] | Cases [2] | Investigations [1] | Licensing Transactions [5+] | Provider Meeting Participants [0] | Transaction Rooms [0] | Payments Received [5+] | DocuSign Status [0] | Open Activities [4] | Activity History [5+] | Notes & Attachments [5+] | Licensing Document Library [5+] | History [5+] | Provider Rooms [0]

Provider / Umbrella / Assistant Detail

Edit | Delete | Generate License | Document Library | Create a licensing visit | Move Back To Permanent Address | New Transaction (using wizard)

Name	Best Center EverNew [View Hierarchy]	Umbrella	Best Center Ever Umbrella
Business Name		Licensor	Lynne Philpot [Change]
Provider / Umbrella / Assistant Type	Large Group [Change]	Previous Type	
Provider Number	P-186311	Legacy System Number	8032271
License Status	Licensed	Provider Status	Current

The Document Library displays a list of documents that are expected to be managed by the programs:



Document Library

Back To Provider Record

Provider Name: Best Center EverNew

Uploaded By Internal Staff | Upload Icon

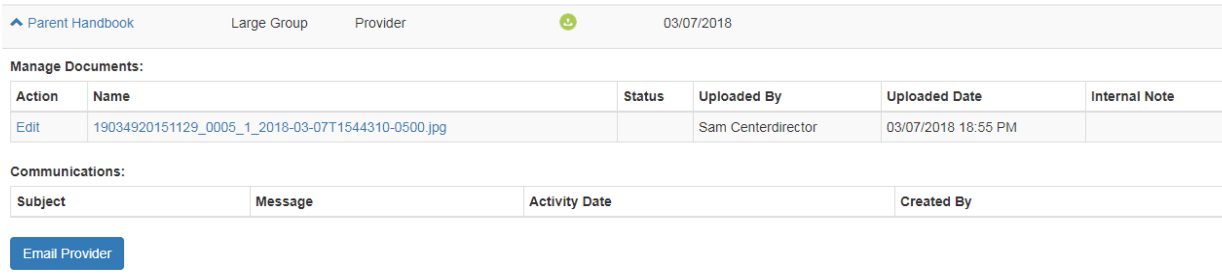
Library Documents

Edit | Send Rejected Document to Provider

Document Type	Program Type	Responsible Party	Upload Document	Uploaded Date	Expiration Date	Status	Not Applicable
Background Records Check policy	Large Group	Provider				Unsubmitted	
Building Inspection	Large Group	Provider				Unsubmitted	
Detailed lead paint inspection	Large Group	Provider				Unsubmitted	Not Applicable
Enrollment Procedures	Large Group	Provider		04/25/2018	04/25/2019	Returned for Revision	
Evacuation/Emergency Contigency Plan	Large Group	Provider		05/14/2018		Reviewed	

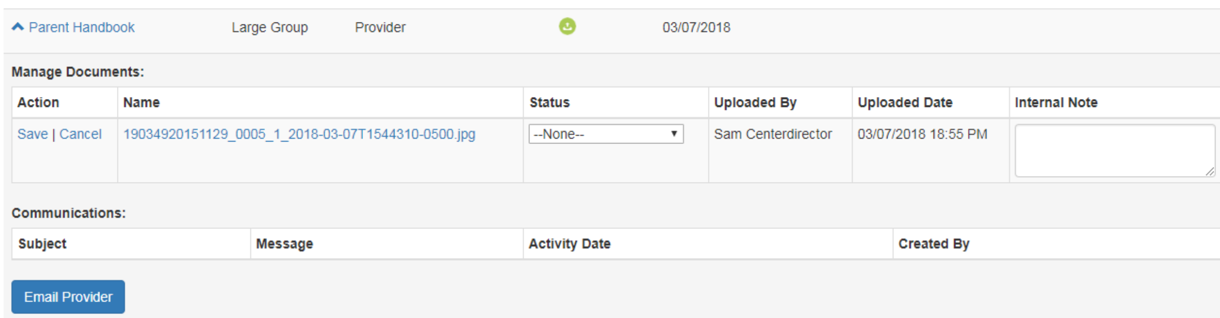
As you can see, the Document Library categorizes all of the different kinds of documents that a provider will submit. Providers will be able to upload documents to the Document Library using the LEAD Portal. For Providers who are not using the LEAD Portal, EEC staff can upload documents on the program's behalf by clicking on the "Upload Document" icon for the relevant document to be uploaded.

EEC staff can view the uploaded documents by clicking on the name of the document type, which will then create a new window displaying the document filename:



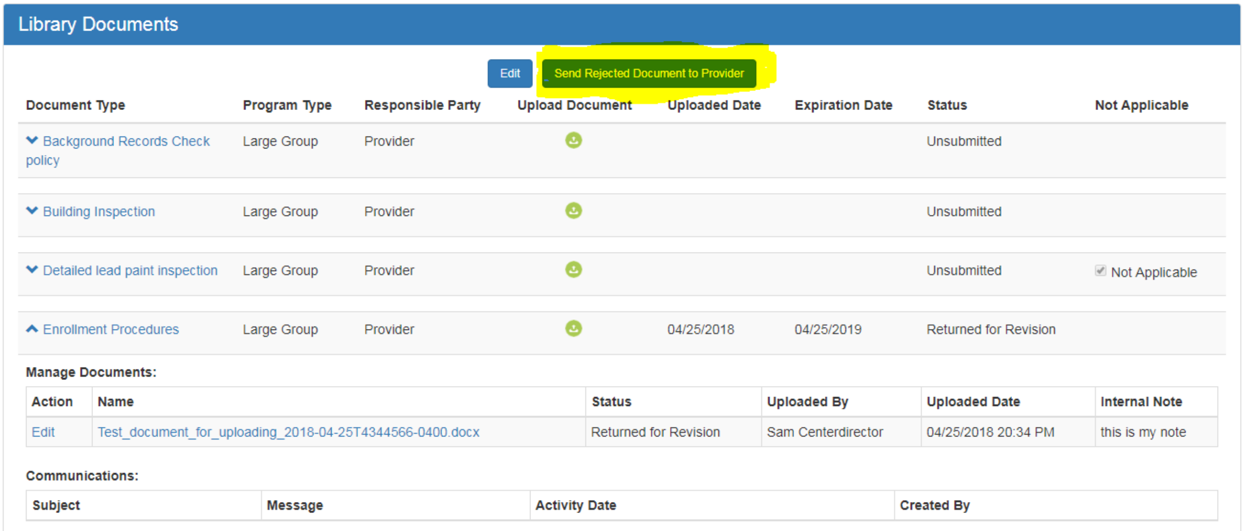
Clicking on the document name will open the uploaded document into a new window.

EEC staff can also approve or reject a submitted document on this screen. By clicking on the "edit" action, EEC staff can change the document status and leave internal notes about the document:



In addition, an e-mail can be sent about the document directly to the provider using this screen. When communicating with a provider about a document, EEC staff should use the "Email Provider" feature within the Document Library, so that the correspondence about the document can be logged for future reference.

Submitted documents can also be rejected using the Document Library by updating the status of the document to "Returned for Revision" and then clicking the "Send Rejected Document to Provider button at the top or bottom of the Document Library:

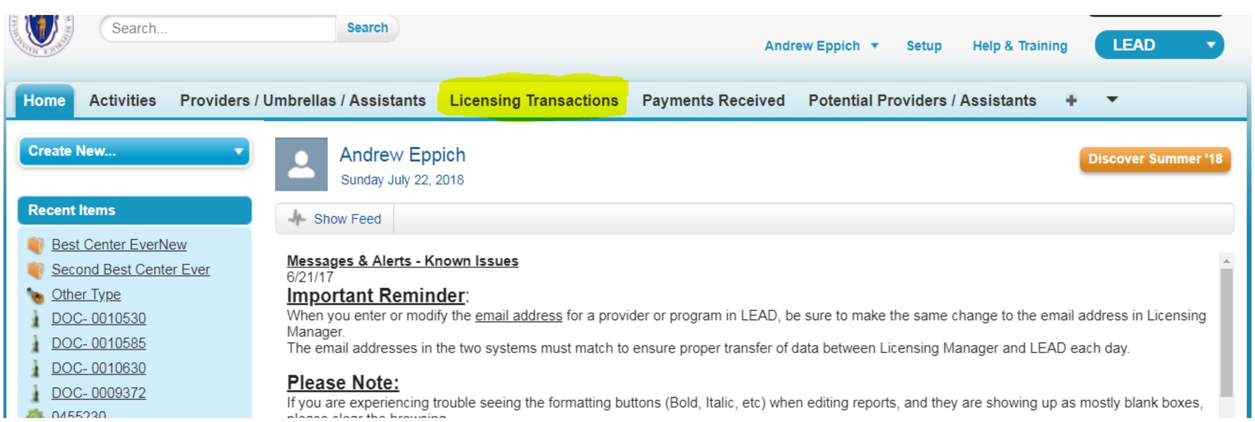


Umbrella level LEAD Portal users can choose to manage documents at the umbrella level, rather than at the individual program level. For any documents that an umbrella designates as an umbrella-managed document, the documents will be found by going to the umbrella record and clicking on the Document Library button there. When a document is designated as an umbrella level document, it applies to all programs of that particular type under that umbrella.

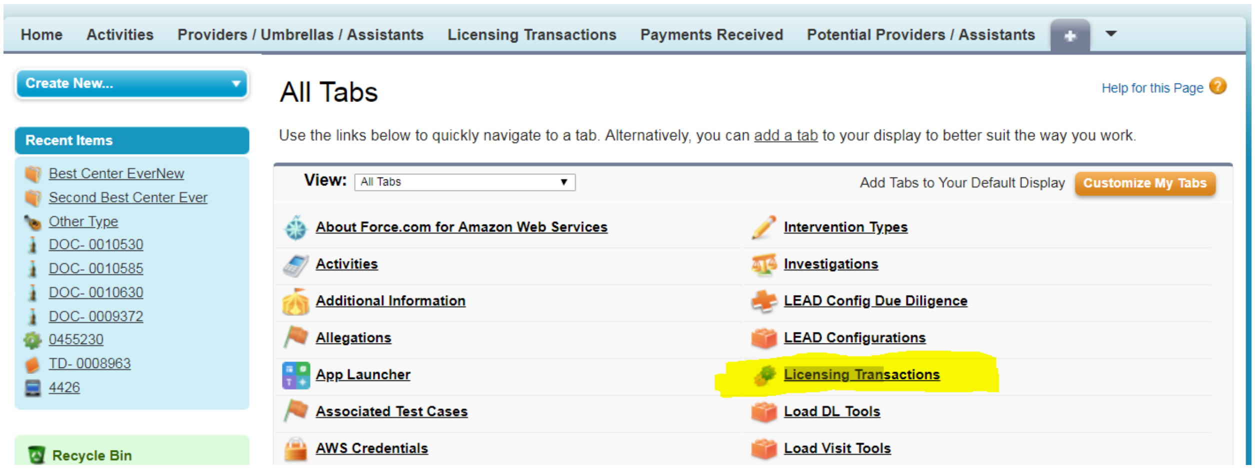
VIII. Using Views to Search for Transactions

EEC staff can use views to easily search for transactions that are ready for their attention. This way, a licensor, administrator, or supervisor does not have to track down a specific provider when searching for transactions to process. Instead, a LEAD view will generate a list of transactions ready for processing or review.

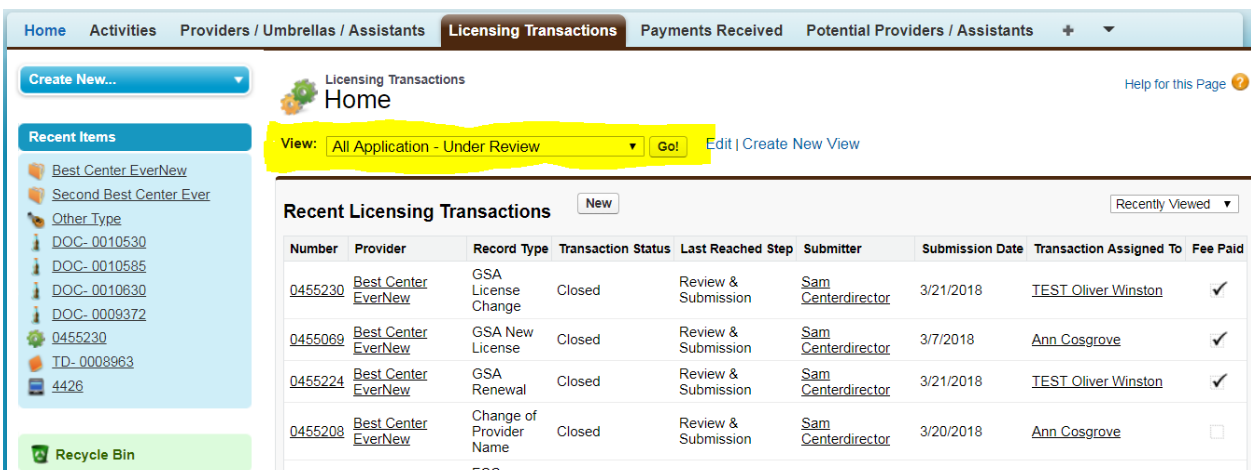
On the LEAD homepage, look for the “Licensing Transactions” tab on the top bar:



If you do not see the “Licensing Transactions” tab, click on the “+” on the top bar and search for “Licensing Transactions” on the next screen:



On the Licensing Transaction screen, you will see the View dropdown near the top:

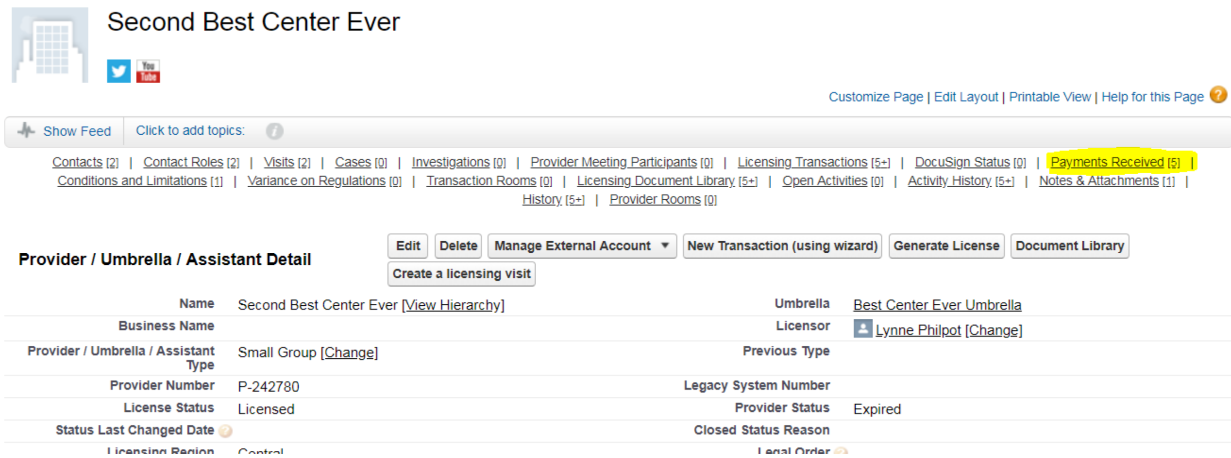


Clicking on the View dropdown arrow will display a number of pre-made views for your use. Using these views, you can narrow down your search and display only transactions that fit a certain criteria, such as “under review” or “pending supervisor approval.” In addition, you have the ability to create a new view by clicking on the “Create New View” link next to the view dropdown.

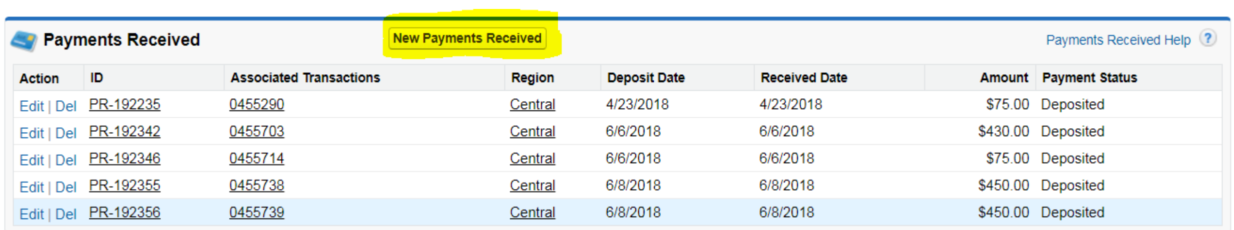
Views are extremely customizable, and you are encouraged to explore all of the views and to ask the LEAD team for assistance in creating a new view that will meet your needs.

IX. <u>Processing Payments in LEAD</u>

LEAD will allow EEC staff to process payments and fees quickly and easily. First, locate the provider in LEAD and click on the "Payments Received" link at the top of the page:

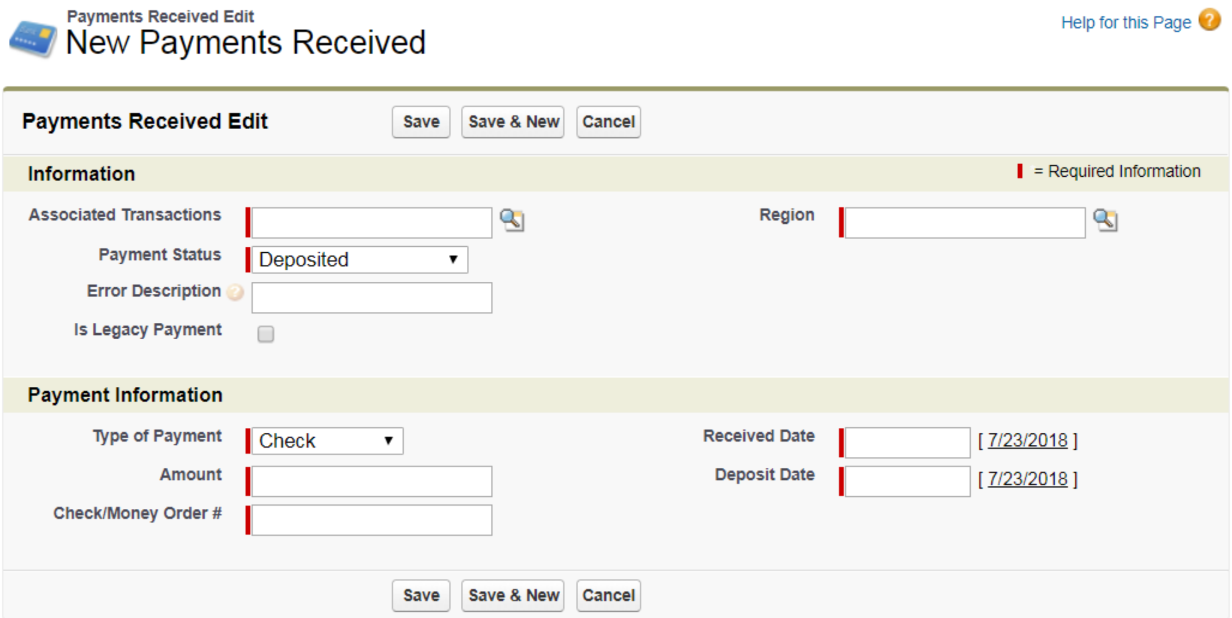


Once located, click on the "New Payments Received" button on top:

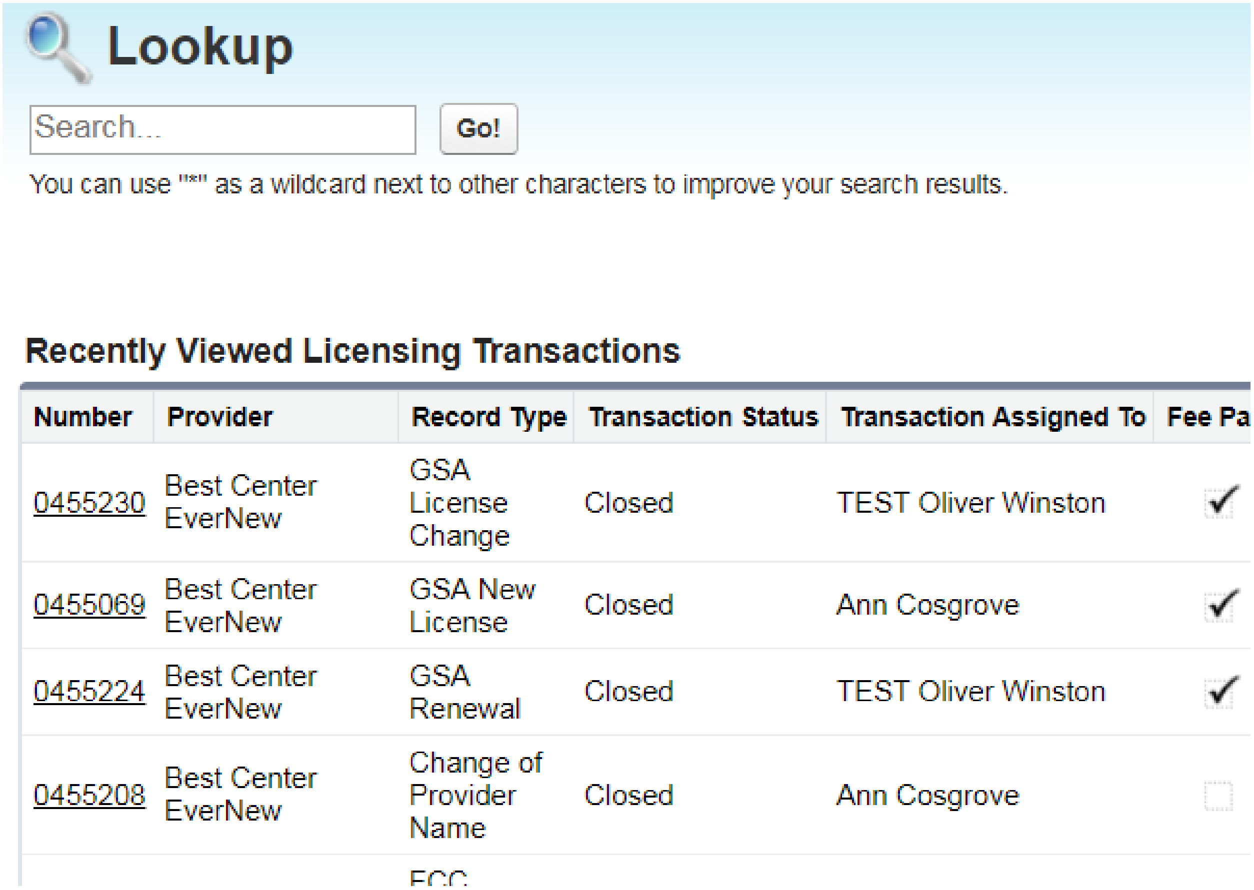


Action	ID	Associated Transactions	Region	Deposit Date	Received Date	Amount	Payment Status
Edit | Del	PR-192235	0455290	Central	4/23/2018	4/23/2018	$75.00	Deposited
Edit | Del	PR-192342	0455703	Central	6/6/2018	6/6/2018	$430.00	Deposited
Edit | Del	PR-192346	0455714	Central	6/6/2018	6/6/2018	$75.00	Deposited
Edit | Del	PR-192355	0455738	Central	6/8/2018	6/8/2018	$450.00	Deposited
Edit | Del	PR-192356	0455739	Central	6/8/2018	6/8/2018	$450.00	Deposited

This will bring you to the "New Payments Received" screen. Required fields are marked in red:



Keep in mind that you will be required to link the payment with an associated transaction. If you know the transaction number, you can type it into the "Associated Transactions" field. Otherwise, click on the magnifying glass icon next to the field to bring up a transaction search window. This window will also show your most recently viedwed licensing transactions:



Lookup

Search...

Go!

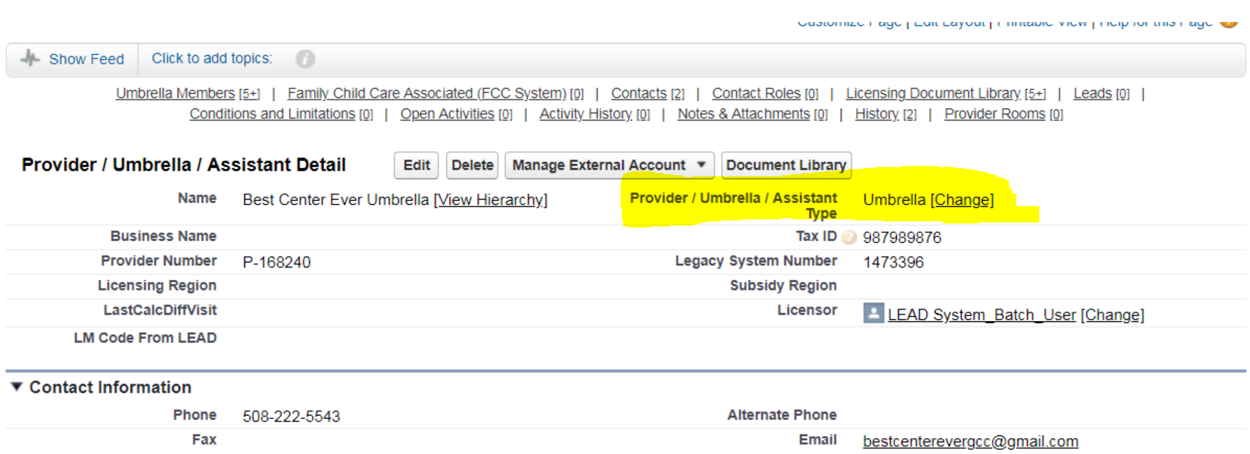
You can use "*" as a wildcard next to other characters to improve your search results.

Recently Viewed Licensing Transactions

Number	Provider	Record Type	Transaction Status	Transaction Assigned To	Fee Pa
0455230	Best Center EverNew	GSA License Change	Closed	TEST Oliver Winston	✓
0455069	Best Center EverNew	GSA New License	Closed	Ann Cosgrove	✓
0455224	Best Center EverNew	GSA Renewal	Closed	TEST Oliver Winston	✓
0455208	Best Center EverNew	Change of Provider Name	Closed	Ann Cosgrove	
		FCC			

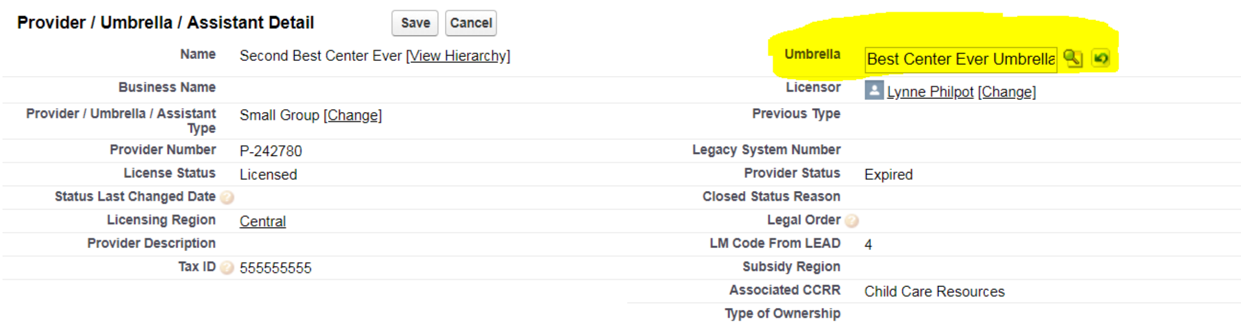
X. Umbrella Organizations

Umbrella Organizations are maintained and managed within LEAD. The Umbrella Detail screen is similar to a provider detail screen, but it is marked as a "Umbrella" on the top of the screen:

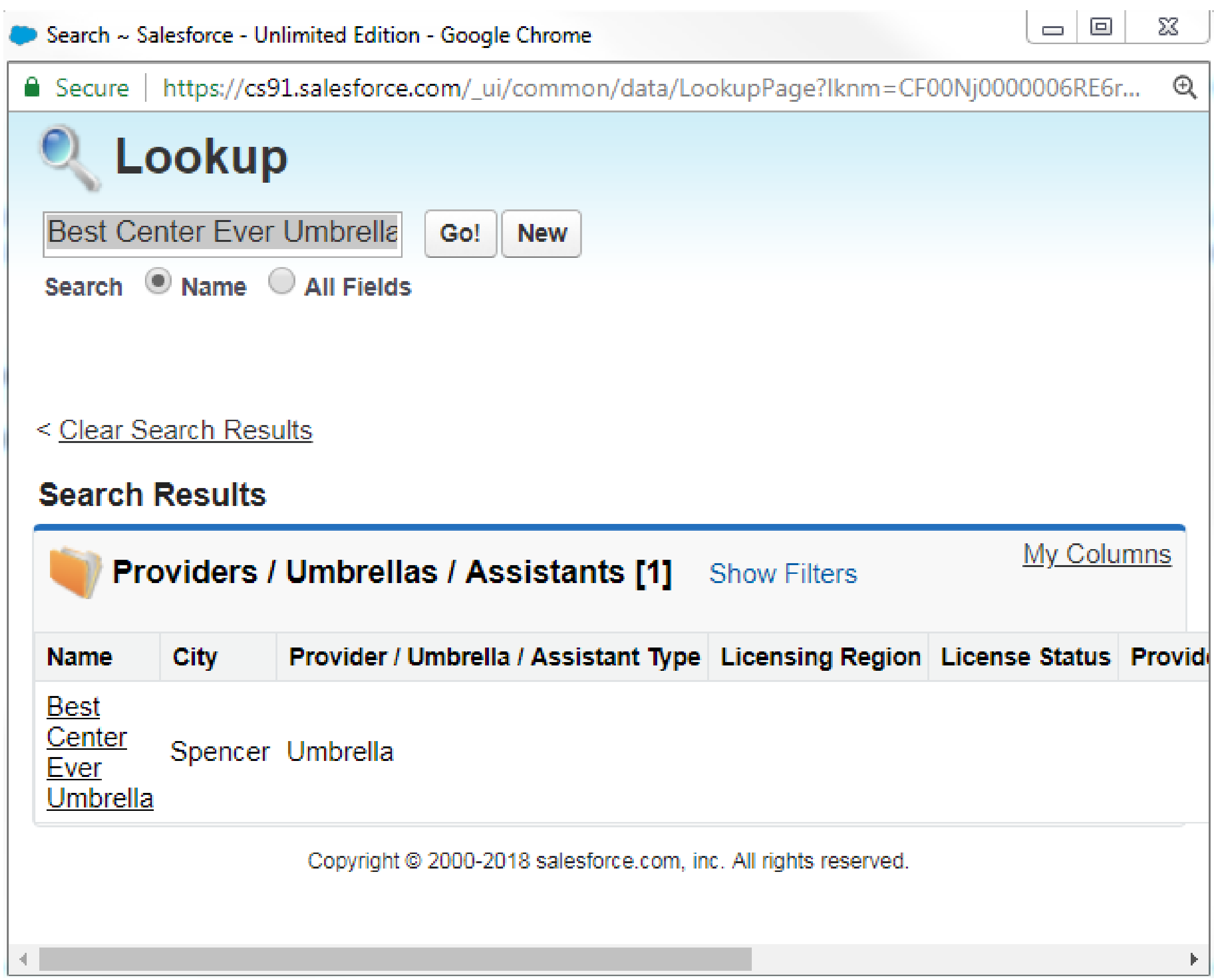


A couple of important notes about umbrellas:

A new GSA and R&P program *must* be associated with an umbrella. If the umbrella already exists within LEAD, the GSA or R&P program can be linked to the umbrella by updating the "Umbrella" field on the Provider Detail page:



The Umbrella field also allows you to search for the umbrella using the magnifying glass icon next to the field. This will bring launch the umbrella search in a different window:



Programs affiliated with an umbrella can be viewed and managed on the Umbrella Members section of the umbrella details screen:

Umbrella Members New Provider / Umbrella / Assistant Umbrella Members Help

Action	Name	Provider / Umbrella / Assistant Type	City	Phone	Licensing Region	License Status	Provider Status	Licensor Full Name	Expiration Date
Edit | Del	Second Best Center Ever	Small Group	Shrewsbury	(999) 888-9999	Central	Licensed	Expired	Lynne Philpot	6/29/2018
Edit | Del	Another Great Center	Large Group	Assonet	(666) 777-8888	Central	Licensed	Current	TEST Oliver Winston	6/29/2019
Edit | Del	Lynne TShelter	Temporary Shelter	East Bridgewater	(666) 333-4444	Central	Licensed	Current	TEST Oliver Winston	5/26/2020
Edit | Del	Temp. Shelter Provider	Temporary Shelter	Boston	(432) 555-6666	Western	Licensed	Current	Fahmida Chowdhury	1/17/2019
Edit | Del	Foster Care	Foster Care Agency	Salem	(432) 555-6666	Western	Licensed	Current	Fahmida Chowdhury	10/30/2021

Show 5 more » | Go to list (10) »