HOW TO ADD A PROVIDER
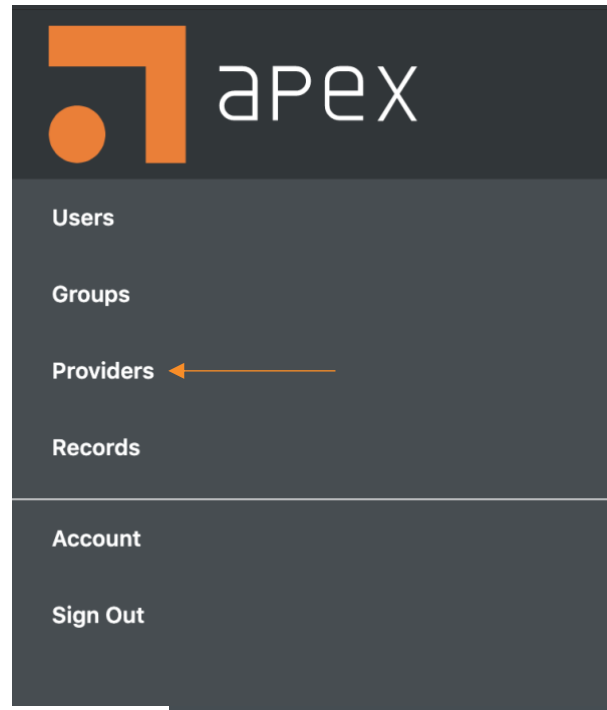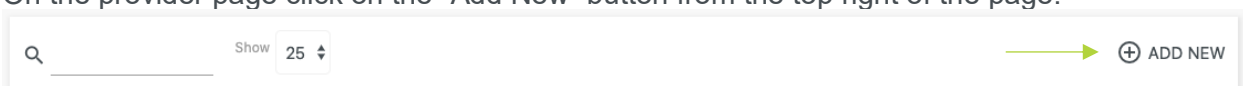
We have a video walkthrough of this process also that you can find by following this link:
https://youtu.be/bnh0TGVAT3E

Login to the Data Hub, and from the options on the left click on the "Providers" option:

On the provider page click on the "Add New" button from the top right of the page:

This is where you will add your provider information and schedule. The first fields you see are related to the type of provider you are adding:

CREATE A PROVIDER

Provider type

Provider sub type

Do you have a license number? ○ Yes ○ No

☐ Sub-contractor   ☐ Designated healthcare provider

Once you have gone through the fields above you will be asked to link an account. This should **always** be left blank unless you are adding yourself as a provider. This should only ever be used to link your user account to your provider profile when you are adding your own provider details.

Linked User Account

* Select a user account to link this provider to

[⬍]

Below the option to link a provider and user account you will find the Contact Information section for the provider being added. You will need to click the small down arrows to the right of each option in order to expand that section and enter information:

Contact Information

Names   ⌄

Phones Numbers   ⌄

Email Addresses   ⌄

Once expanded you will see the option to enter the information for your provider. You will want to expand each option even if you do not have information you are going to enter in each field. If there is a field, you have no information for click the circle and minus icon ⊖ to the right to remove the field. Otherwise enter the relevant information and check the box for "Primary" even if you are not entering any alternate information for that field:

Contact Information

Names ⌃

| First name | Middle name | Last name | ☐ Primary | ⊖ |

⊕ Add Name

Phones Numbers ⌃

| Phone number | * Phone type ⬍ | ☐ Primary | ⊖ |

⊕ Add Phone Number

Email Addresses ⌃

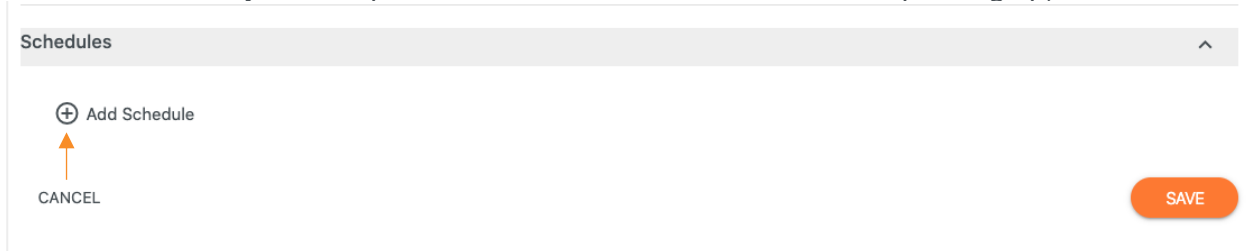| Email address | * Email type ⬍ | ☐ Primary | ⊖ |

⊕ Add Email Address

Once you have the contact information entered you will move on to selecting the group for your provider. The group is the same as selecting your parent sponsor for your sites. When selecting the group for your provider do not select the site the provider will be working at (this will be done later), select the sponsor for this field. You will notice it highlight when you click the sponsor (your highlight color may be different than what is shown below):

Groups

* Select group(s) to assign this provider to

Pretend Sponsor
Pretend site
Test Site Colorado
Test Site DEF
Test Sponsor ABC
Test State SBHC

Once you have your sponsor selected from the main groups list you will move on the last section, which is adding the providers schedule. This is where you will select the specific site(s) that the provider will be working. To get started click on the small down arrow to the right of "Schedules" and then click the "+" icon to add a new schedule (in the image below the schedule section has already been expanded. You will notice the arrow is now pointing up):

When you click the option to add a schedule you will be given the option to select a group. Here is where you will select the site the provider will be working. Just click on the empty field to get a list of the sites related to your parent sponsor (if you are entering information for a provider that will float between multiple sites, and it is not set when they will be at each site select the sponsor again when choosing your group):
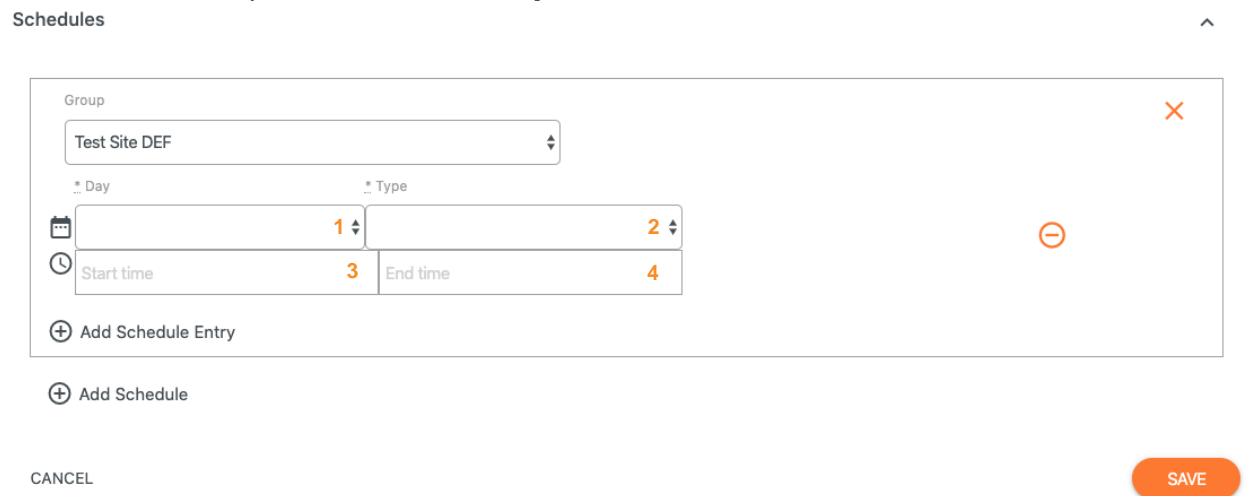

With your group/site selected click the "+" icon to add schedule for the provider. Click the empty fields to get the options to enter the information for the schedule. You have four fields that need to be completed to add the schedule:
Field 1 – Day of the week
Field 2 – Frequency the provider works on that day
Field 3 – Time the provider starts their day
Field 4 – Time the provider ends their day

When adding the time for the provider schedule you will be given a popup window with the time on the left, and an analog style clock on the right. The clock on the right is used to select the time, and you will see the changes reflected by the time on the left. You can click and hold to drag the green circle around to select the time, or you can click directly on the desired time. After selecting the hours, the clock on the right will change to allow you to select minutes (If you need to go back to the hours option click on the hour option on the left to switch back to the hour selection). You will also notice under the time on the left options for AM and PM. The option that is highlighted in white is what is active for the time you are selecting. In the example below the time you would get after clicking "OK" would be 9:00AM:
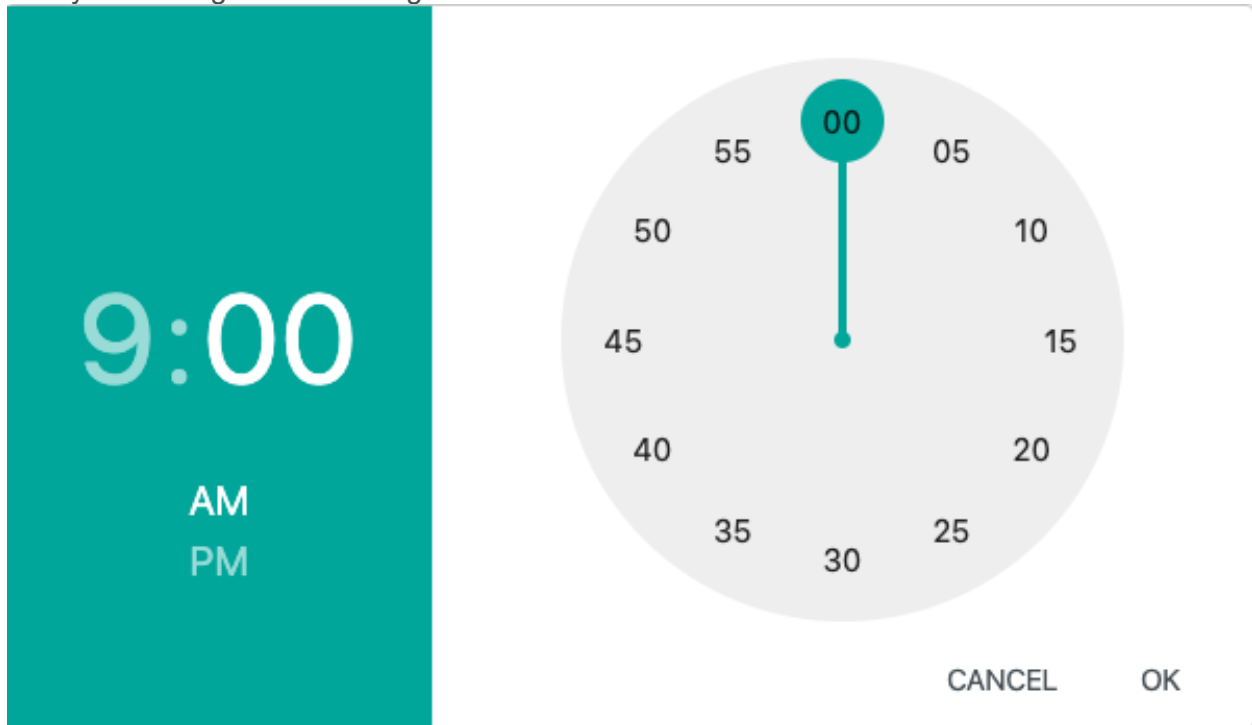
Once you have the schedule for that day entered you will repeat the schedule steps for each day the provider will be working. A filled-out schedule for a day at a site is shown in the image below:
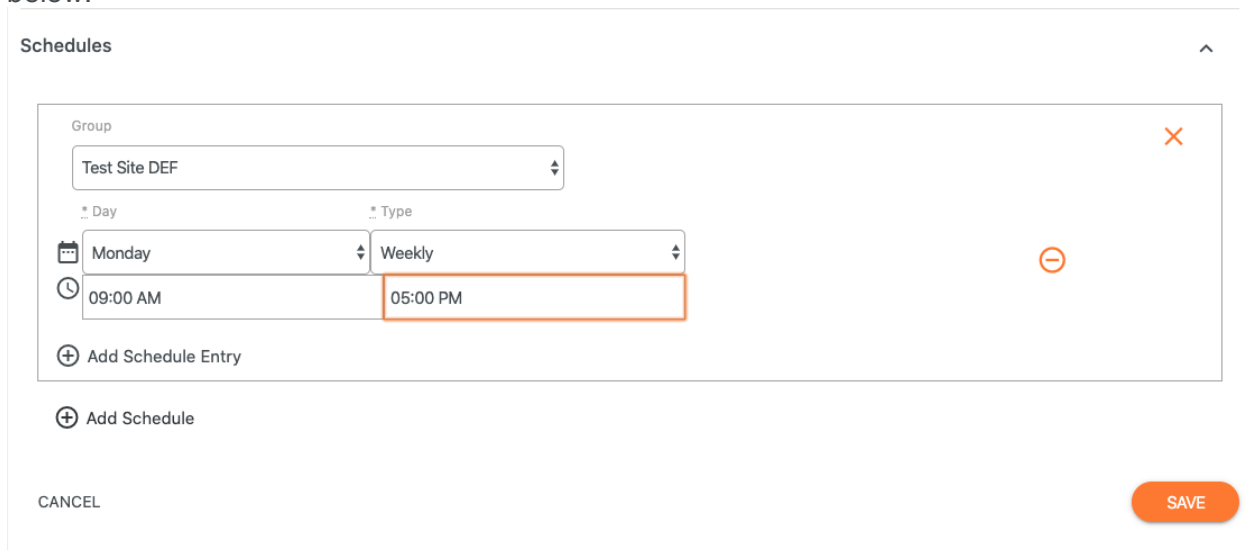
To enter the next day, you would click the "+" icon next to "Add Schedule Entry" and to add a schedule for an additional site you would click the "+" icon next to "Add Schedule". Below is an example of what it looks like to have a schedule entered in for two separate sites:

Once you have entered all of the information you can then click the orange "SAVE" button at the bottom right of the page.