

Adding a New Resource

TIPS:

1. Resource Maintainers need to be set up for statewide access.
2. During start-up in SHINES, adding new resource when requested is high priority.
3. When searching for a resource in SHINES, remember to check for state. System defaults to Georgia, and an out-of-state resource has to have their state selected.
4. Resources that are made “inactive” and the resource ID is not known, the resource can only be found when selecting inactive in the Advance Search section.
5. Relative Care providers can be added to SHINES by RA Resource/contract Maintainer in emergency situations.
6. When validating a new resource address that has a P.O. Box #, and SHINES changes the address when validating, do not validate after entering address. Save the resource page, and select “CANCEL” or “NO” when prompt to validate address. This will not change the P.O. Box address.
7. For addresses with apartment #, and SHINES changes the address when validating, follow instructions in tip #4.
8. As an alternative to using the mouse and clicking on each field on a SHINES page, use the Tab button. For Identification Number field, type R and it will show Resource and will avoid accidentally clicking Contract. Hitting the Enter key will do the Search instead of clicking on the Search button with mouse.
9. On Service by Area page, when viewing the services added and there are several pages and you do not want view every page, double click on page number, enter in new number and hit enter button, not “next”.

Index:

- A. Search for Resource
- B. Making an incorrect or duplicate resource Inactive.
- C. Making an Inactive Provider Resource Active in SHINES

SHINES Financial Training
Adding a New Resource

Revised August 2010

A. Search for Resource

Note 1: Add new Resource (Accounting will only add NEW service providers for the following programs: 511, 513, 518, 521, 531, 551, 573, 772, 773, 774, 783, 784, 873, 874, 883, 884. ILP, Unusual Medical or Dental and Burials for Foster Children).

Note 2: Before adding a new resource, a search for the resource must be completed.)

- Search the SMILE system in Vendor files. Search by last name and first name in SMILE. If vendor has a Resource ID, then search by the Resource ID. IF vendor is found without a Resource ID, then continue Search on SHINES.
- Click on Resource Tab → Resource Search

- Enter Last Name in Resource Name Field

Note: You can use part of name, Resource ID, Resource Type and other criteria. Also check state of provider, search is automatically for Georgia.

- Click on SEARCH button. The new Resource should not be listed in the Search Results.

SHINES Financial Training

Adding a New Resource

Revised August 2010

- e. Enter the First Name in the Resource Name Field
- f. Click on the SEARCH button. The new Resource should not be listed in the Search Results.
- g. Click Add button

The screenshot shows the 'Add Resource' form in the SHINES system. The form is titled 'Add Resource' and includes a 'Resource Detail' section with various input fields and dropdown menus. The fields include Resource Name, Legal Name, Resource Type, Status, Ownership, Facility Type, National Provider Number, Web Address, School Type, Payment Method, and Comments. There is also a 'Primary Address Detail' section below. The browser's address bar shows 'https://shines.dhr.state.ga.us/resource/ResourceSearch/results'.

- h. Enter Resource name
 - a. Person – last name, first name (Smith, John)
 - b. Couple – Last name, Husband **OR** Wife (Smith, John or Mary)
 - c. Business – Name on W9
- i. Enter Resource Legal name (most cases will be the same as Resource name).
(NOTE: This is the resource name that will transfer to SMILE and will be the Payee name on the checks.)
- j. Enter Resource Type – Accounting will use “Provider” for service providers. NOTE: Other resource types will be added by Non-Accounting staff (Caseworkers, Resource Developers, Rev Max, etc.)
 - a. Home/Other Facility (Family Foster Care, Relative Care, and RBWO)
 - b. Others - unpaid resources
- k. Leave Status at “Active”
- l. Select Maintainer Region (your region or statewide if for Programs 511 and 518) If known, enter:
 - a. Contact name
 - b. Contact Title
 - c. Facility Type

SHINES Financial Training Adding a New Resource

Revised August 2010

- d. E-mail address
- e. Web site address

The screenshot displays the 'Add Resource' web application interface. The browser window title is 'Add Resource - Microsoft Internet Explorer'. The address bar shows the URL: <https://shines.dhr.state.ga.us/resource/ResourceSearch/results>. The page content is divided into two main sections:

- Primary Address Detail:**
 - * Type: Primary (dropdown)
 - Vendor ID: [text input]
 - Attention: [text input]
 - * Address Ln 1: [text input]
 - Address Ln 2: [text input]
 - State: Georgia (dropdown)
 - * City: [text input]
 - * Zip: [text input] - [text input] [Validate button]
 - * County: [dropdown]
 - Comments: [text area]
- Primary Phone Detail:**
 - * Type: Primary (dropdown)
 - * Phone: [text input]
 - Ext: [text input]
 - Comments: [text area]

The Windows taskbar at the bottom shows the Start button, several open applications (Novell GroupWise, Mail From: Sylvia, Resource Contrac..., status: Connecte..., Add Resource - Mi...), and the system tray with the time 11:45 AM.

m. Open Primary Address Detail Section

- a. Should show Primary as Type
- b. Vendor ID will added when interfaced with SMILE, leave blank
- c. Enter Attention text space if known
- d. Enter Address #1 (Street Address)
- e. Enter Address #2 (if additional space is needed)
- f. Enter City
- g. Select state if not Georgia
- h. Enter Zip Code
- i. Select County
- j. Click on Validate button. System will check to see if address is a correct address. If shown as not validated, click OK to continue.

n. Open Primary Phone Detail Section

- a. Should show Primary as Type
- b. Enter Phone Number, a temporary number can be used to add the resource and then updated later when correct number is known (you must enter something in this box)
- c. Enter Extension number, if known
- d. Enter comments if needed.

SHINES Financial Training
Adding a New Resource

Revised August 2010

- o. Save. This will take you back to the Resource Search Page.
- p. If you need to add additional Phone numbers (Work, Home, Cell, School, etc.)
 - a. Enter Last Name on Resource Name
 - b. Click on SEARCH button and scroll down for Search Results.
 - c. Click on Resource Hyperlink to take you to Resource Detail Page
 - d. Open Phone List
 - e. Click on ADD
 - f. Select Type (if you select Contact, it will add the information entered to the top of the Resource Detail page)Enter phone number
 - g. Enter Extension number, if knownEnter comments, if needed.
- q. Save

Note: The night the Resource has been entered in SHINES the information will go over to SMILE through an interface. The next day the new Resource should be approved by Regional Accounting and will be assigned a vendor number. The vendor number will be interfaced back over to SHINES the night the Resource has been approved. The next day the vendor number will be linked to the Resource in SHINES.

SHINES Financial Training Adding a New Resource

Revised August 2010

B. Making an incorrect or duplicate resource Inactive.

NOTE: Once a resource is made inactive, it cannot be used in SHINES. To find an inactive resource in SHINES, enter the resource ID or select 'Inactive' as part of the Advance Search.

1. Search for the resource.
2. On the Resource Detail Page, click on Status drop-down menu and select Inactive.
3. Save.

The screenshot shows the 'Add Resource' form in the SHINES application. The form is titled 'Add Resource' and includes a 'Resource Detail' section. The form is displayed in a Microsoft Internet Explorer browser window. The address bar shows the URL: https://shines.dhr.state.ga.us/resource/ResourceSearch/results. The browser window title is 'Add Resource - Microsoft Internet Explorer'. The form includes the following fields:

- Resource Name:
- Legal Name:
- Resource Type:
- Maintainer:
- Status:
- Contact Name:
- Ownership:
- Contact Title:
- Facility Type:
- National Provider Number:
- Email Address:
- Web Address:
- School Type:
- School District:
- Payment Method:
- Transportation Provided
- Comments:

The form also includes a 'Primary Address Detail' section. The browser window shows the 'Log Off' button and the 'IDS' and 'GHP' buttons. The taskbar at the bottom shows the Start button, several open applications, and the system tray with the time 7:34 AM.

SHINES Financial Training
Adding a New Resource

Revised August 2010

C. Making an Inactive Provider Resource Active in SHINES.

1. Search on Resource

- a. Use either the Resource Name or Resource ID
- b. Go to Advance Search Field. Click Drop Down Box to choose Blank.

The screenshot shows the 'Resource Search' form in the SHINES system. At the top, there are two tabs: 'Resource Search' (selected) and 'ORS Resource Search'. The main heading is 'Resource Search' with a note that some fields are 'conditionally required'. The form is organized into several sections:

- Resource Details:** Includes fields for Resource Type, Identification Number, Category, Resource Name, Program, and Service.
- Location/Area Served:** Includes radio buttons for Location, Area Served, and Proximity. Fields include Region, Address Ln1, City, Zip Code, Proximity Range (miles), County, and State (pre-set to Georgia).
- Advanced Search:** A collapsed section containing:
 - Resource Status:** Resource Status and Contract Status dropdowns.
 - Home/Facility Information:** Type dropdown and an 'Available After Hours' checkbox.
 - Client Characteristics:** Age, Gender, and Characteristics dropdowns.

A 'Search' button is located at the bottom right of the form.

- c. Click Search → Resource Search Results

SHINES Financial Training Adding a New Resource

Revised August 2010

Resource Search Results

[Resource Search](#) | [ORS Resource Search](#)

Scroll for more information -->

Resource Name ▼	Resource ID	Status	Distance C ▼	Resource Type ▼	Type	Dispstn	R
<input type="checkbox"/> A-1 Tent And Party Rentals	8544406	Inactive	0.0	Provider			

2. Click on the Name Hyperlink → Resource Detail

Resource Detail

Resource Name: A-1 Tent And Party Rentals
Resource ID: 8544406

Resource Detail * required field

[Expand All](#) [Collapse All](#)

Resource Detail

* Resource Name: Resource ID: 8544406

* Legal Name:

Resource Type: * Maintainer:

Status: Contact Name:

Ownership:

Facility Type:

Contact Title:

Contact Phone:

National Provider Number:

Email Address:

Web Address:

School Type:

School District:

Payment Method:

Transportation Provided Prime Sub

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3. Click on the Status Drop Down Box Choose Active

4. Click Save.

5. Check to make sure Contract is active. If not you will need to add a new contract version.