Budget Workbook for Agencies Job Aid

The process flow below outlines the steps which need to be completed in order for the Budget Definition to become a Budget Workbook.

Agency

Provider

\*Provider Entity is not specifically tied to the Budget Workbook; the **Provider** completes this when they have access to the Supplier Portal.

# Provider Entity Information Update

The following shows how to update Provider Entity Information.

The Provider Entity Information is not specifically tied to the Budget Workbook

However this is information the Provider completes when they have access to the Supplier Portal and can be viewed by the Agencies.

The Provider or the Agency can update information through Find an Existing Value Tab.

**Navigation:** Supplier Contracts > Budgeting > Provider Entity Information

The Entity Provider Information page will display.

Enter the **Supplier ID**, (or use the magnifying glass) or enter the **Name** of the Provider then click **Search**



The Provider Entity Page is broken down into three tabs.

On the first tab (**Provider Entity Information)**

Enter the **DUNS #**

Enter the **Provider Fiscal Year End** (Month)

Enterthe **SAM (CAGE) No.** and the **SAM (CAGE) No. Expiration Date**

Answer Yes/No for the **80 percent** field

Answer Yes/No for the **$25,000,000** field

Answer Yes/No for the **Litigation Pending** field. If Yes, the Comment field is required to be filled out.

Enter **Accreditation List**

Click **Save** 

Click on the **Entity Contacts** tab

This will display a list of the current contacts and their information that have been setup by the Provider.

If changes need to be made, the Provider Administrator will have the Supplier Change Request Link available.



Click on the **Entity Certifications** tab

Select the **Certification Type**

Enter an **ID Number** and an **Expiration Date**

Click the **+ sign** to add additional certifications

There are three links to other websites to assist with this section

(Biznet, The Office of Secretary of the State, or License Lookup)



Click **Add Attachment** to attach copy of the certificate

Click **Browse** and select the file that is to be uploaded



Click **Upload**

Click **View Attachment**



At the bottom of the screen, click **Open** to view the attachment.

Click **Save**

