

# Bulk Provider Update

Last Modified on 10/29/2019 2:02 pm CDT

Use the Bulk Provider Update function to update information for multiple providers at a time. For example, you can update tier eligibility or CACFP agreement dates.

1. Click the **Administration** menu and select **Bulk Provider Update**. The Provider Filter window opens.
2. Set filters for the providers to include in the change. Check the **Choose Providers From List** box to select specific providers from a list.
3. Click Continue. If you did not check the Choose Providers From List box, the Bulk Provider Update window opens. Go to **Step 5**.
4. If you choose to select providers in **Step 2**, the Choose Providers dialog box opens. Check the box next to each provider and click **Continue**. The Bulk Provider Update window opens.
5. Check the box next to each item to update. You can update the following: Claim Source, Provider Status, CACFP Agreement Date, Income Eligibility, License Start Date, License End Date, or Census Eligibility.

The screenshot shows the 'Bulk Provider Update' window. At the top, there are several filter sections, each with a checkbox and radio buttons for 'Update' or 'Filter':

- Claim Source:** Update (selected), Filter. Dropdown: --Select--
- Provider Status:** Update (selected), Filter. Dropdown: --Select--
- CACFP Agreement Date:** Update (selected), Filter. Date field: / /
- CACFP Expiration Date:** Update (selected), Filter. Date field: / /
- Income Eligibility:** Update (selected), Filter. Start Date: / /, End Date: / /. Includes checkbox: Remove Income Dates for Tier 2/M Providers.
- License Start Date:** Update (selected), Filter. Date field: / /
- License End Date:** Update (selected), Filter. Date field: / /
- Census Eligibility:** Update (selected), Filter. Start Date: / /, End Date: / /. Includes checkbox: Remove Census Dates for Tier 2/M Providers.

Below the filters, it says 'Provider Filter: Active & Hold'. There are buttons for 'Click Refresh List to apply filters', 'Clear Options', and 'Refresh List'.

| Select                   | Done                     | #    | Provider Name               | Tier | Data Src | CacfpAgree | CacfpExpire | IncomeStart | IncomeEnd | CensusStart | CensusEnd | LicenseStart | LicenseEnd | Pt |
|--------------------------|--------------------------|------|-----------------------------|------|----------|------------|-------------|-------------|-----------|-------------|-----------|--------------|------------|----|
| <input type="checkbox"/> | <input type="checkbox"/> | View | 654987                      | 2    | SF       |            |             |             |           |             |           | 01/01/17     | 01/01/18   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 005463 AA, AAA z            | 2    | SF       |            |             |             |           | 01/01/17    | 12/31/21  | 01/01/17     | 03/18/20   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 131313 AccountLuman, TestC  | 2    | WEB      |            |             |             |           |             |           | 01/01/18     | 01/01/20   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 005464 adfadf, fadsf a      | 2    | WEB      |            |             |             |           |             |           | 01/01/17     | 01/01/19   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 998899 Aldrichs, Jessica    | M    | WEB      |            |             |             |           |             |           | 07/01/19     | 12/31/50   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 111222 BB, AA               | 2    | WEB      | 10/01/19   |             |             |           |             |           | 10/01/19     | 10/02/19   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 001240 Brady, Alicee        | 2    | WEB      |            |             |             |           |             |           | 11/01/17     | 12/31/50   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 231678 changedtest, modtes  | 2    | WEB      |            |             |             |           |             |           | 01/01/17     | 12/31/50   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 001239 Cordova, Anna        | 2    | WEB      |            |             |             |           |             |           | 08/15/17     | 12/31/50   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 002409 Dalton, Jennifer     | 1    | WEB      |            |             |             |           |             |           | 06/03/19     | 06/03/20   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 998885 Dough U, John        | 1    | WEB      | 05/08/18   | 05/08/18    |             |           |             |           | 05/01/18     | 10/08/20   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 008585 DTest, Jennifer      | 2    | WEB      |            |             |             |           |             |           | 07/01/17     | 09/30/20   | A  |
| <input type="checkbox"/> | <input type="checkbox"/> | View | 000052 Email Test, Jennifer | 1    | WEB      |            |             |             |           |             |           | 01/01/18     | 12/31/18   | A  |

At the bottom, it shows 'Provider Count: 63', 'Providers Selected: 0', and 'Providers Updated: 0'. There are buttons for 'Select All', 'Deselect All', 'Print', 'Cancel', 'Save', and 'Close'. The 'Print' button has a dropdown menu with 'Selected', 'Done', and 'ALL' options.

6. Set new dates, as needed.
7. Check the box next to each provider to which to apply these changes.
8. Before saving your changes, click **Print** to print a report that lists all providers you

are updating and their current information. Review this report carefully and confirm that you have selected the correct providers. You cannot reverse this process once its complete.

9. Click **Save**.