



# Change Request

## Provider Staff Updates

## Change Request Provider Staff Updates

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CE Providers can change provider staff in the roles of primary contact, CE director and social work consultant through a change request.

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The following provider information is required for each contact role:

- name
- job title
- start date in the role
- email address
- phone number
- resume (required for CE director and social work consultant)
- license information (required for social work consultant; required for CE director, if licensed)

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A new provider agreement must be signed by the CE director, social work consultant and CEO/ department head when the roles change.

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Change requests are categorized by the change type.

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Change requests must be submitted in the application portal.

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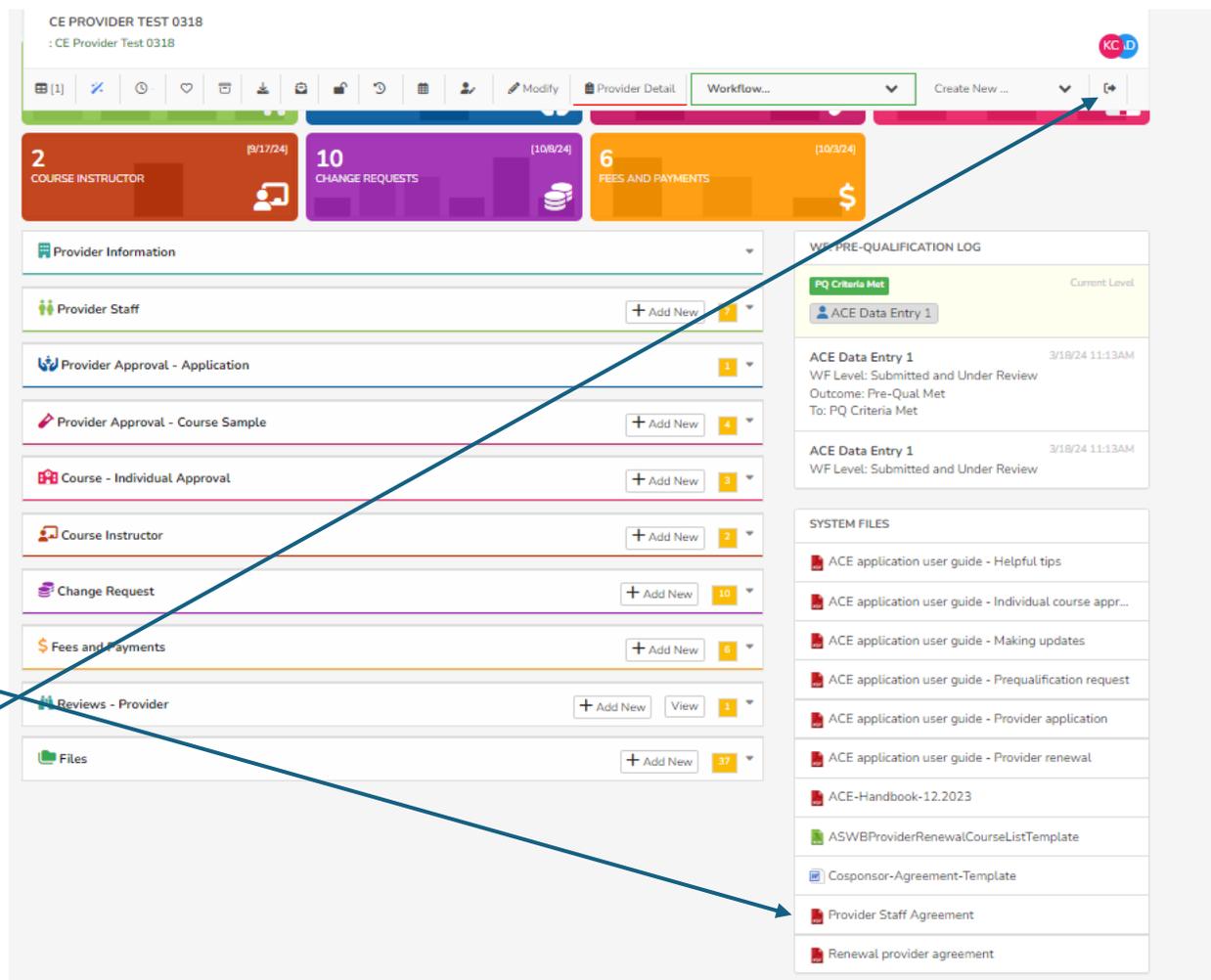
Change requests to update provider staff can take up to 30 days for approval.

# Provider Staff Agreement

If the provider staff roles of CE director and/or social work consultant are changing, signatures must be obtained on the provider staff agreement in advance of submitting a change request.

Access the provider staff agreement in the system files section of the provider record.

Expand the right sidebar for access to system files.

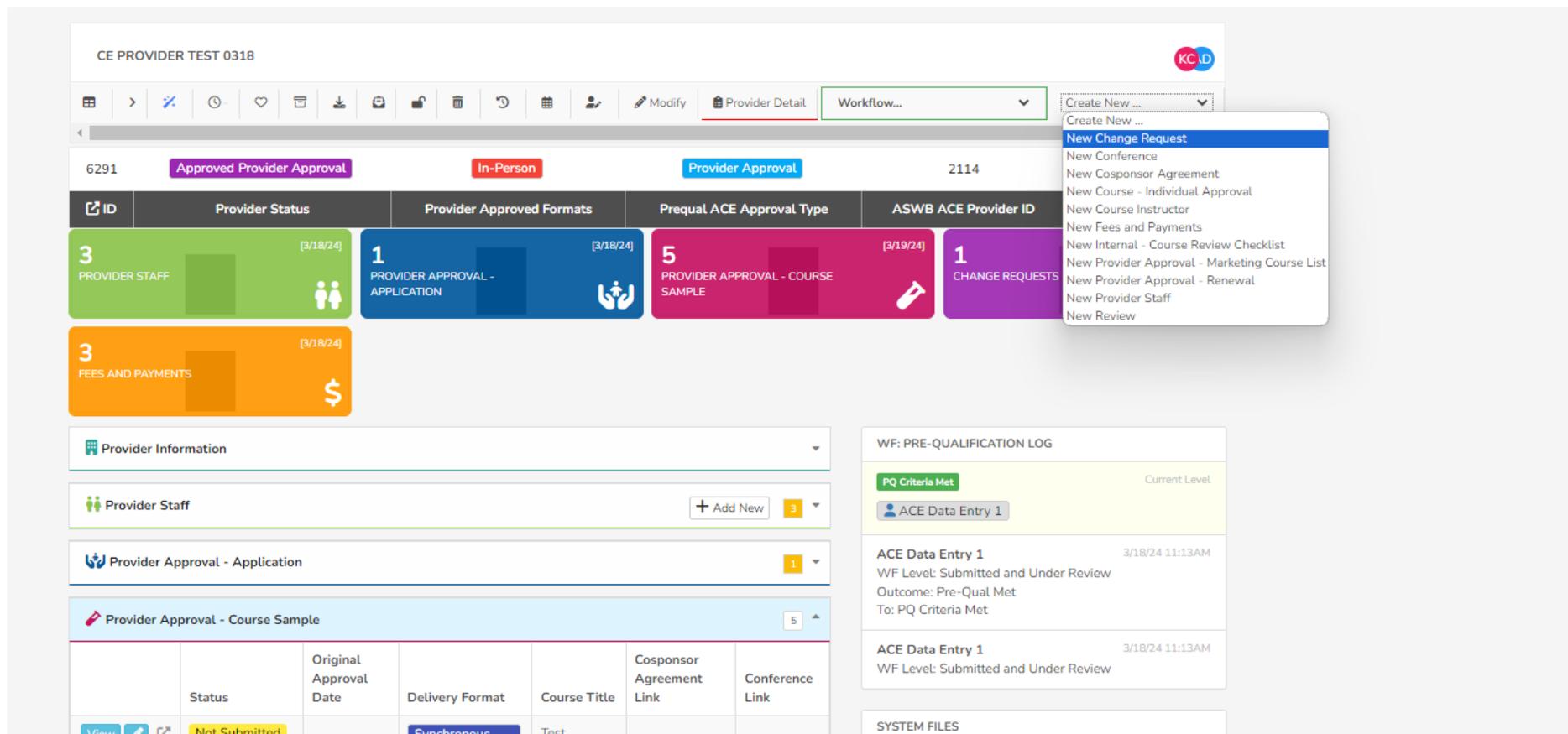


The screenshot displays the 'CE PROVIDER TEST 0318' interface. At the top, there are three summary cards: '2 COURSE INSTRUCTOR' (due 9/17/24), '10 CHANGE REQUESTS' (due 10/8/24), and '6 FEES AND PAYMENTS' (due 10/23/24). Below these is a list of provider-related sections with '+ Add New' buttons and counts: 'Provider Staff' (7), 'Provider Approval - Application' (1), 'Provider Approval - Course Sample' (4), 'Course - Individual Approval' (3), 'Course Instructor' (2), 'Change Request' (10), 'Fees and Payments' (6), 'Reviews - Provider' (1), and 'Files' (37). On the right, the 'SYSTEM FILES' section is expanded, showing a list of files including 'Provider Staff Agreement' and 'Renewal provider agreement'. A red 'KC ID' badge is visible in the top right corner of the interface.

# Entering a New Change Request

Access the provider record in the portal and click the “Create New” dropdown.

From the dropdown list, click New Change Request.



The screenshot shows the ACE provider portal interface for 'CE PROVIDER TEST 0318'. The top navigation bar includes 'Provider Detail' and 'Workflow...'. A 'Create New ...' dropdown menu is open, listing various options, with 'New Change Request' highlighted. The main content area displays provider information for ID 6291, including 'Approved Provider Approval', 'In-Person' format, and 'Provider Approval' status. A table below shows provider staff, fees and payments, and provider approval applications. A 'WF: PRE-QUALIFICATION LOG' section shows 'ACE Data Entry 1' with a status of 'Submitted and Under Review'.

ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID
3	PROVIDER STAFF	1	5	1
3	FEEES AND PAYMENTS			

Status	Original Approval Date	Delivery Format	Course Title	Cosponsor Agreement Link	Conference Link
Not Submitted		Synchronous	Test		

# Change Request Entry Staff Changes

When the change request opens, populate the change effective date.

Select staff changes as the change type.

Select the staff role requiring the change.

Select choose file to upload the signed provider agreement. This is required for CE director and social work consultant role changes.

Click the dropdown in the staff to change field and select the name of the individual vacating the role.

Click the add new staff button and complete the fields when the add new staff screen appears. Click save entry when complete.

Complete the required signature fields at the bottom of the change request and click save entry.

CE PROVIDER TEST 0318  
Change Request

**Provider Details**

More Information Needed  
 Approved  
 Denied

Request Date \*

Change Effective Date \* This is the date that the change should be effective. For instance, if you are closing the business, this would be the closure date.

Change Type \*
  Provider Changes
  Staff Changes
  Provider Level Format Changes
  Major Course Change
  Minor Course Change

**Staff Changes**

Staff Changes \*
  Licensed Social Work Consultant  
 CE Director  
 Primary Contact

Provider agreement \* For organizations with provider level approval, when the CE director or social work consultant changes, a new provider agreement must be signed by all parties and uploaded to the change request.  
Access the provider agreement here.

Staff to Change \*

Add New Provider Staff \*

**Billing**

Number of Course Changes - Minor  auto-calculated

Total Cost \$  auto-calculated

# Change Request Submission

Click "Submit"

CE PROVIDER TEST 0318  
Staff Changes - Primary Contact KC

Provider Details | Modify Entry | Delete Entry | **Submit** |  | 

6291	1468	Approved Provider Approval	Synchronous distance learning	Provider Approval	2114
 ID	Entry ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID

 Change Request 11

 Files + Add New 37

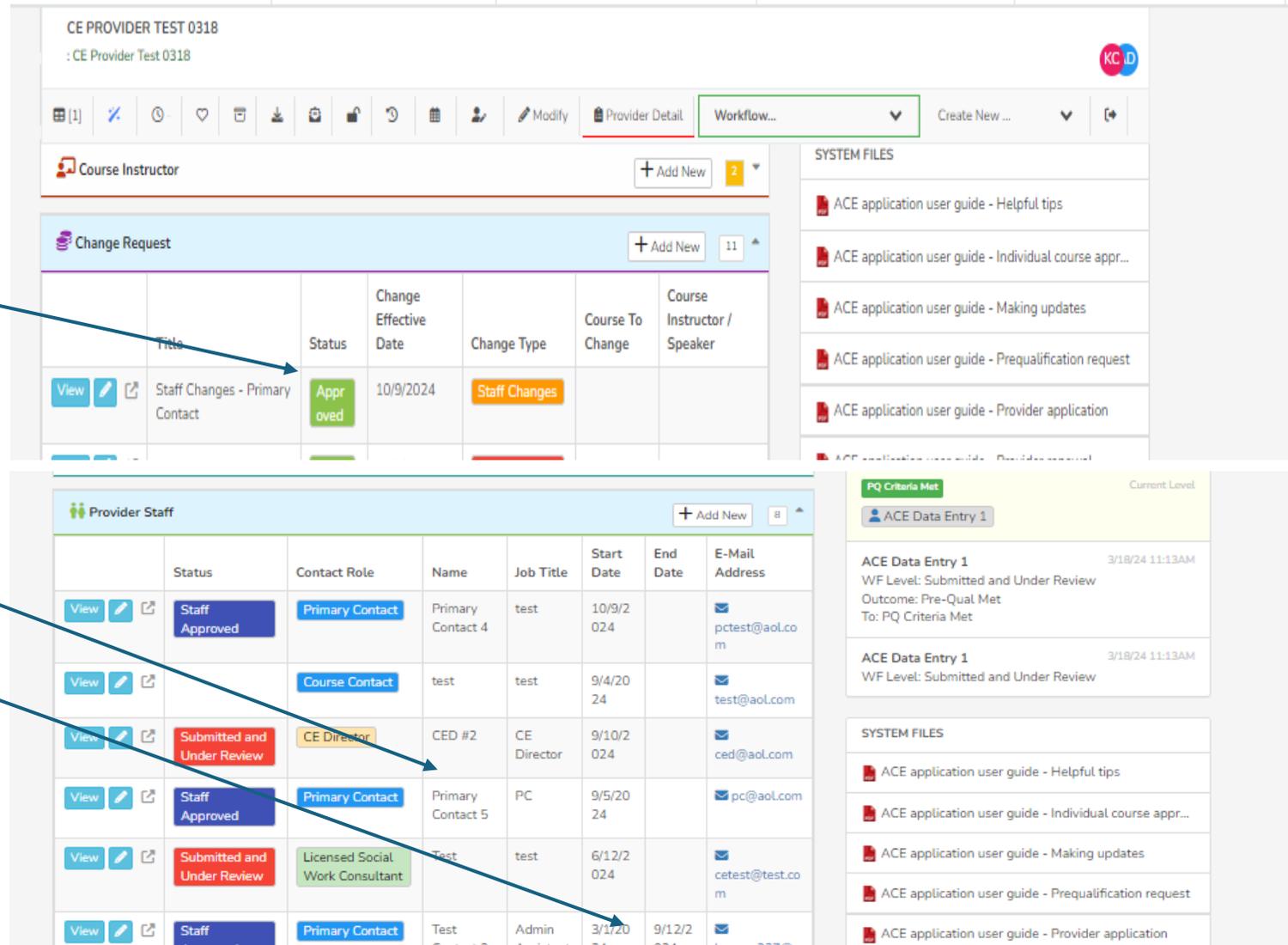
 Notes + Add New 1

# Change Request Approval

Once the change request is approved by ACE the status will reflect approved.

The new contact will be reflected in the provider staff section.

The prior contact will remain listed however an end date for their role will be listed.



The screenshot displays the ACE system interface for 'CE PROVIDER TEST 0318'. It features a top navigation bar with a 'Workflow...' dropdown menu. Below this, there are two main sections: 'Change Request' and 'Provider Staff'. The 'Change Request' section contains a table with columns for Title, Status, Change Effective Date, Change Type, Course To Change, and Course Instructor / Speaker. The 'Provider Staff' section contains a table with columns for Status, Contact Role, Name, Job Title, Start Date, End Date, and E-Mail Address. A 'PQ Criteria Met' section is also visible on the right side of the interface.

Title	Status	Change Effective Date	Change Type	Course To Change	Course Instructor / Speaker
Staff Changes - Primary Contact	Approved	10/9/2024	Staff Changes		

Status	Contact Role	Name	Job Title	Start Date	End Date	E-Mail Address
Staff Approved	Primary Contact	Primary Contact 4	test	10/9/2024		pctest@aol.com
Submitted and Under Review	Course Contact	test	test	9/4/2024		test@aol.com
Submitted and Under Review	CE Director	CE #2	CE Director	9/10/2024		ced@aol.com
Staff Approved	Primary Contact	Primary Contact 5	PC	9/5/2024		pc@aol.com
Submitted and Under Review	Licensed Social Work Consultant	Test	test	6/12/2024		cetest@test.com
Staff Approved	Primary Contact	Test Contact 3	Admin Assistant	3/1/2024	9/12/2024	krwma327@aol.com