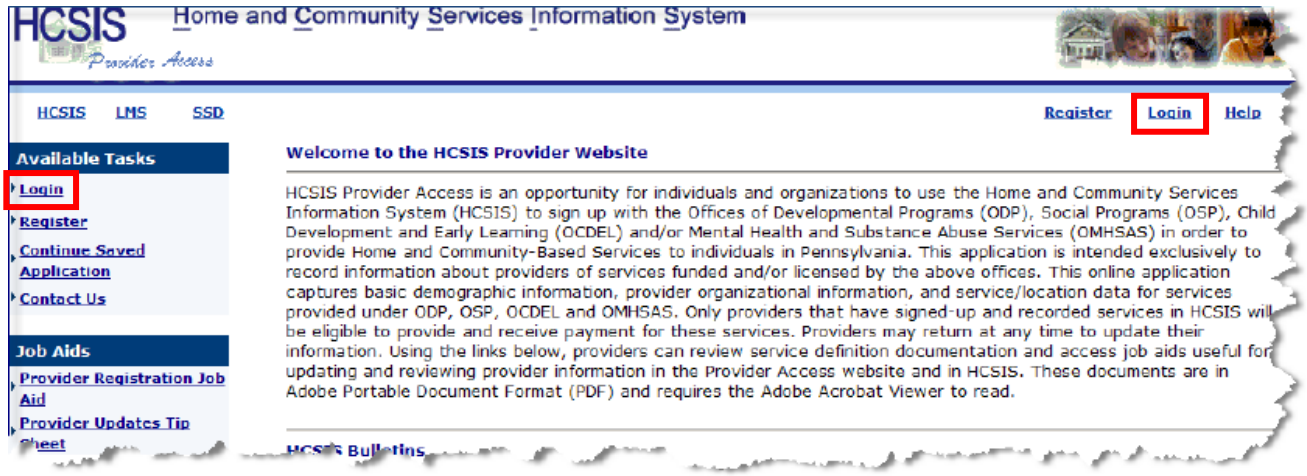
ACCESSING THE CERTIFICATION AND LICENSING SYSTEM THROUGH HCSIS

Providers will access the Certification and Licensing System (CLS) through the Provider Access portal on the Home and Community Services Information System (HCSIS). This job aid is designed to assist new providers in obtaining a Certificate of Compliance by submitting an application in CLS through HCSIS access.

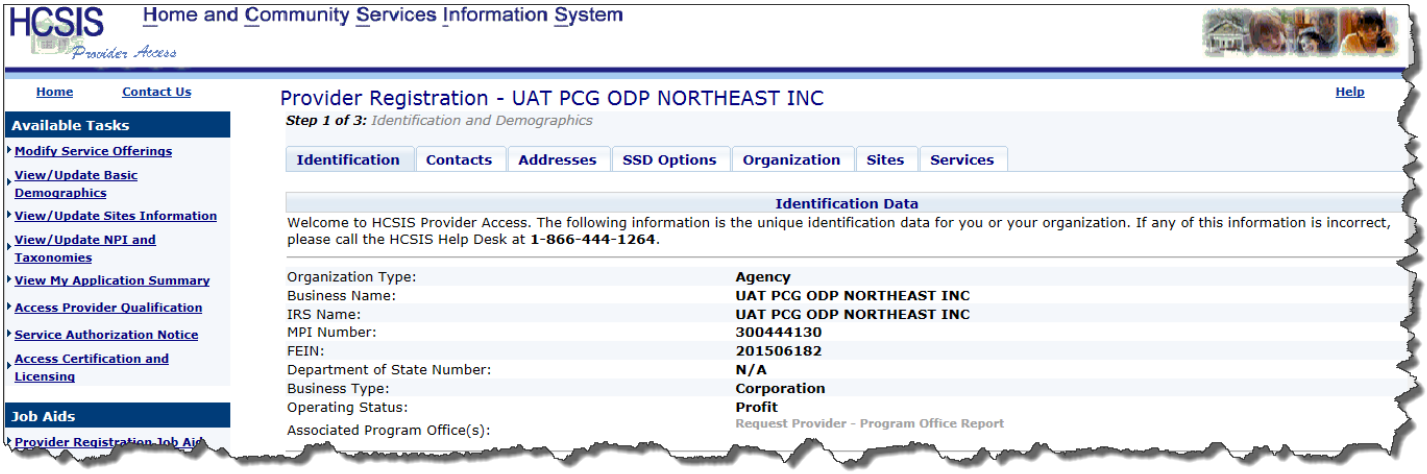
1. Navigate your internet web browser to the HCSIS case management system at: https://www.hcsis.state.pa.us
2. The *HCSIS Landing* screen appears.
3. Click [Provider Access].

4. The *HCSIS Provider Access Home* screen appears.
5. Click Login from the **Available Tasks** menu on the left, or from the Main Menu on the top right.



6. The *Keystone Key Login* screen appears.
7. Enter your HCSIS User ID (Username) and Password, and then click [LOGIN].

8. *The Provider Registration* screen appears and displays the name and basic demographic information about your provider organization.



VERIFYING/UPDATING HCSIS DATA AND CLS DATA

Before logging into CLS to complete any licensing activity, users must confirm that all of their HCSIS legal entity and sites/services/contact information is correct.

From the Provider Access *Provider Registration* screen:

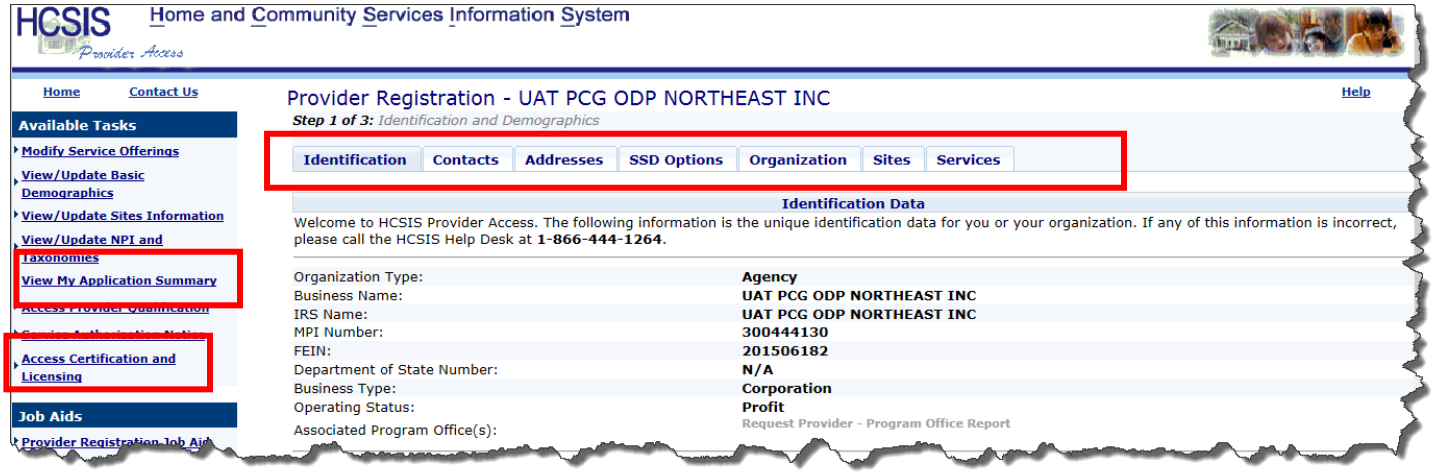
a. Click View My Application Summary to review your legal entity and service location information stored in HCSIS.

b. Use the 7 individual tabs across the top of the Provider Access screen to edit and save changes* to any incorrect HCSIS information associated with each tab**.

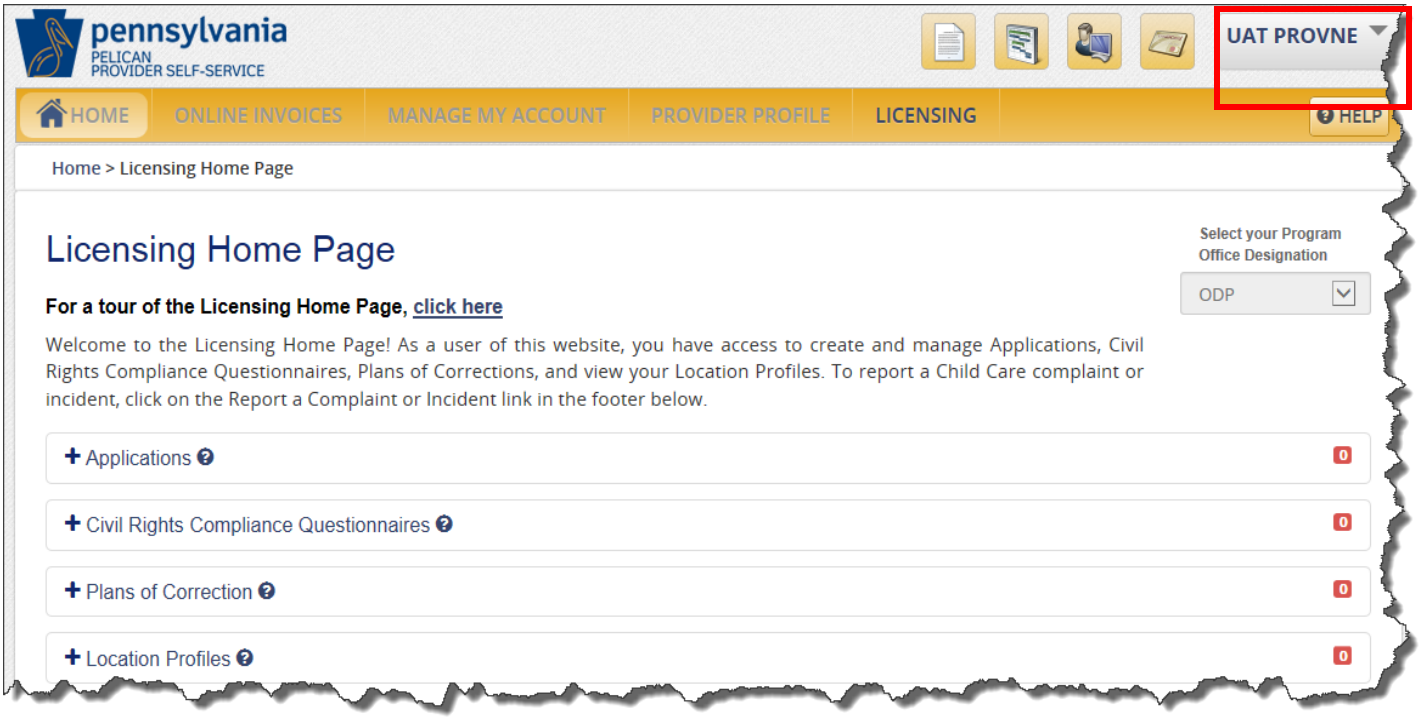
***Note:** *The provider should coordinate with the person who is responsible for maintaining the agency's HCSIS data to perform updates in Provider Access. Please reference the HCSIS Provider Updates Tip Sheet Job Aid on updating information in Provider Access. This tip sheet is available under the Job Aids section of the Provider Registration Screen.*

****Note:** *Once changes are made, the changes will update with a verification pending status. At this time, the provider should submit a verification letter on their agency's letterhead to the HCSIS Help Desk. Once this letter is received, the changes requested will be reviewed and accepted by the Provider Enrollment Unit. After changes have been approved, the status will be updated and will reflect 'Verified'.*

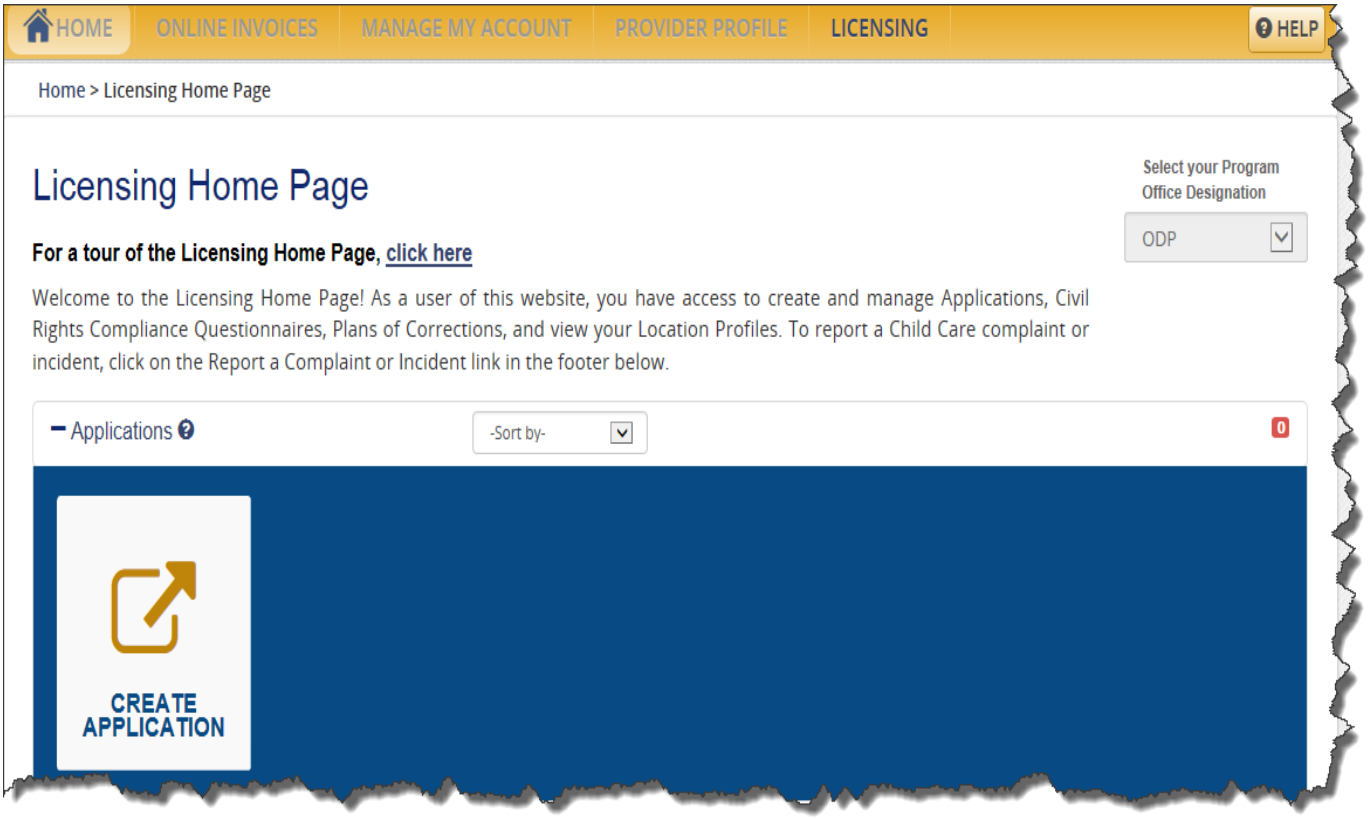
c. When all of the HCSIS information is correct, users can log into CLS by clicking Access Certification and Licensing from the left sidebar menu. The CLS site will open to the Provider Self-Service Licensing Home Page in a new window. Your User Name will display in the top left corner.



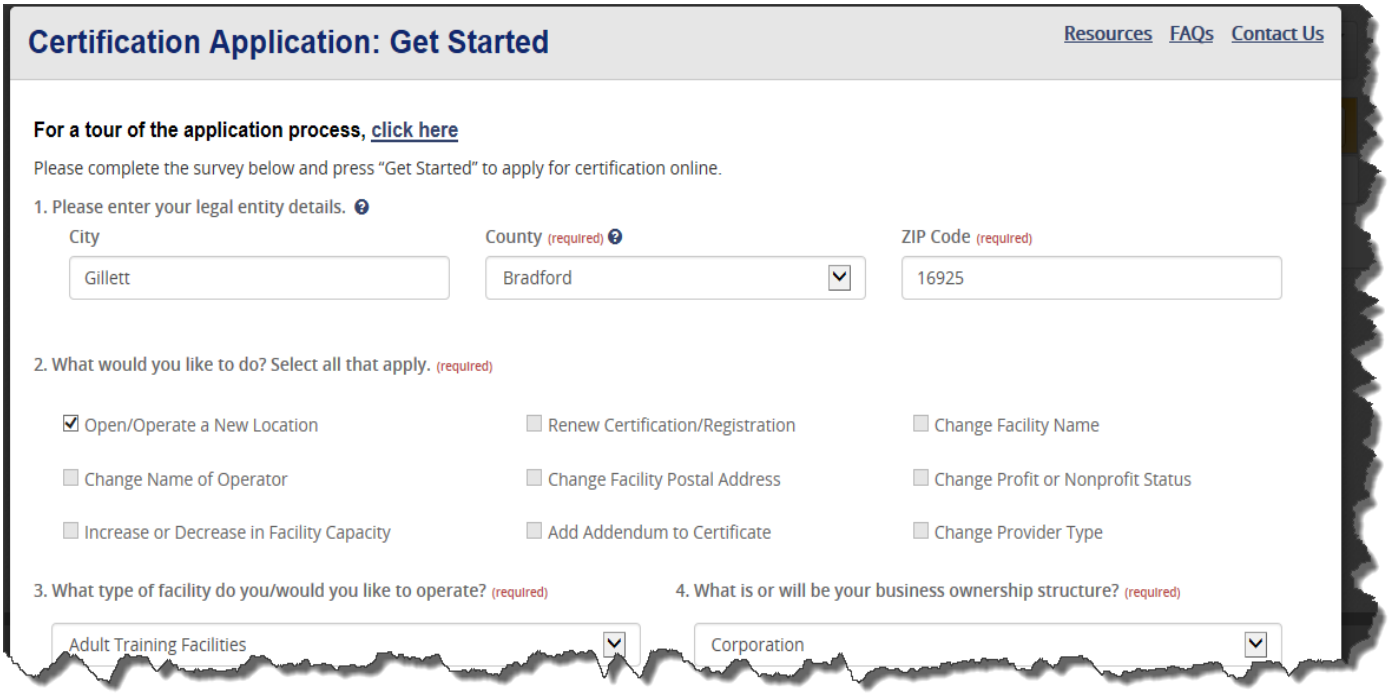
COMPLETING AND SUBMITTING THE APPLICATION



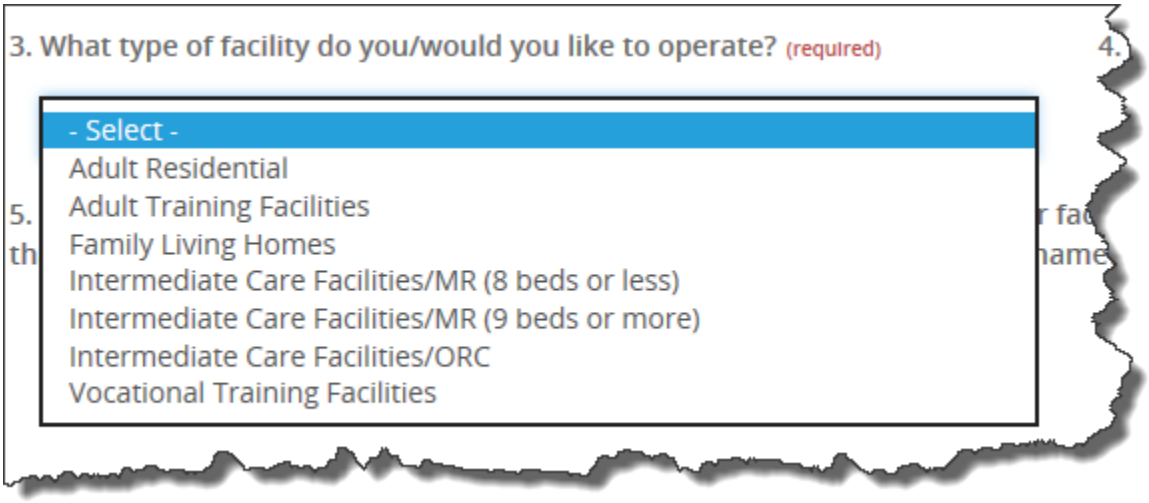
9. Click on Applications and then on Create Application to begin creating your new application.



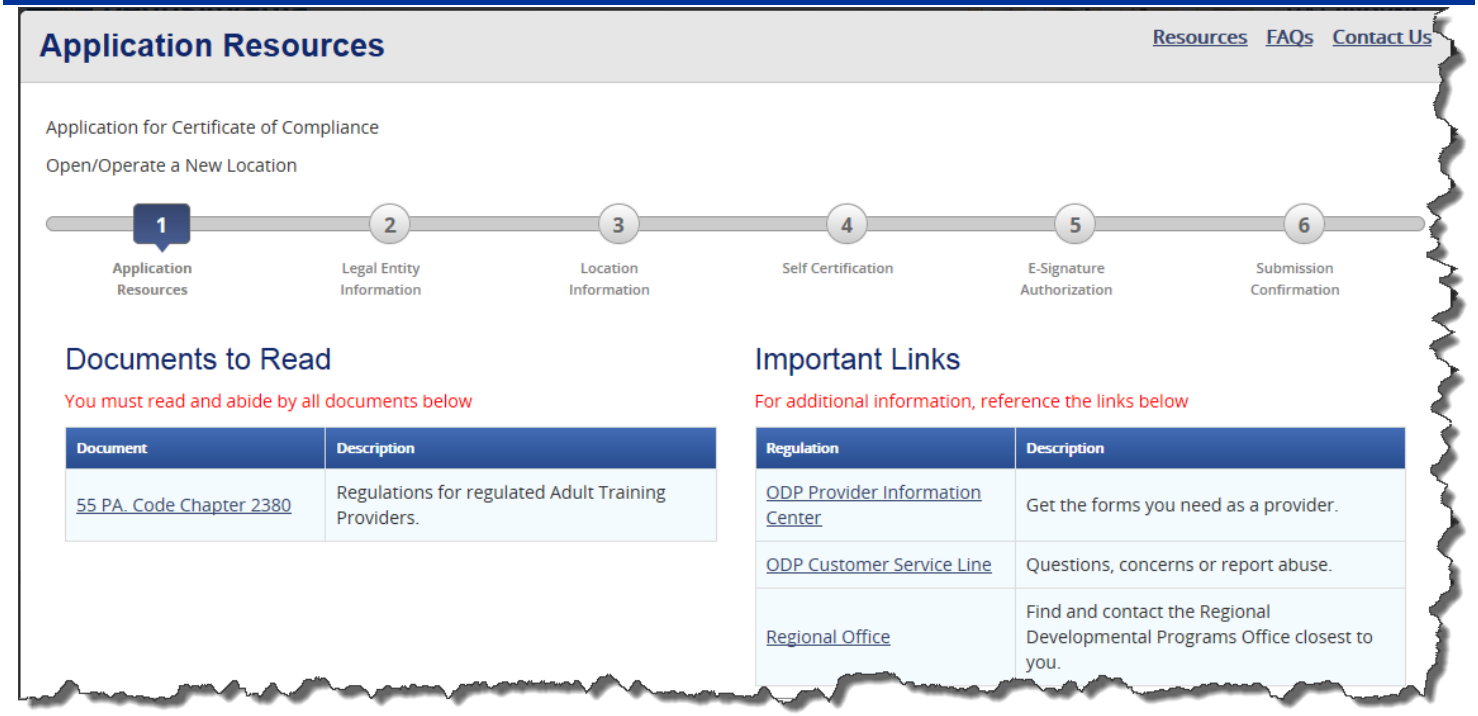
10. Complete the Get Started questions on the screen, entering the information as requested. When you have answered all the questions, click on Get Started in the lower right corner of the screen.



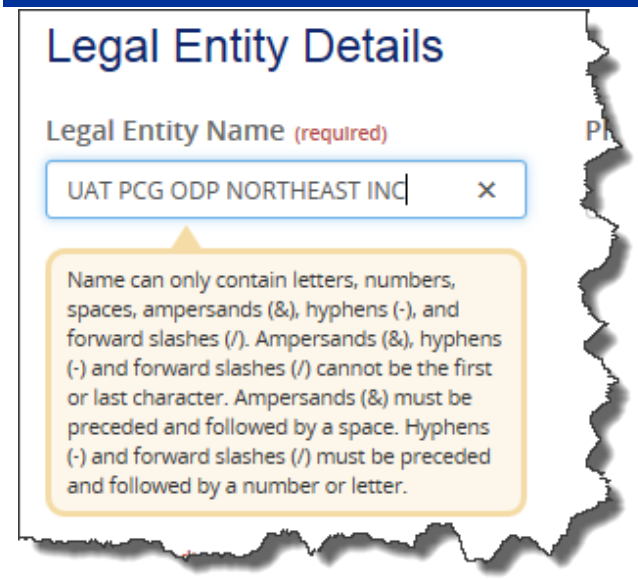
Note: Click on the down arrow to find all of the acceptable selections for that data field.



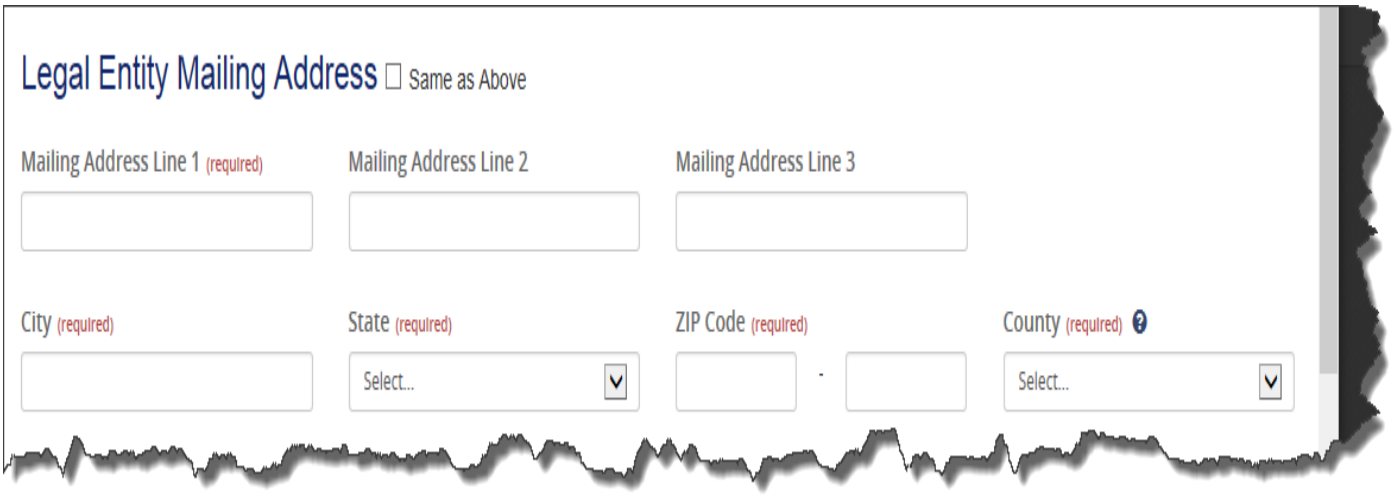
11. The Application Resources page displays, indicating documents you should read that pertain to your facility type and providing important links for future reference. Click on NEXT in the lower right corner to proceed to the application.

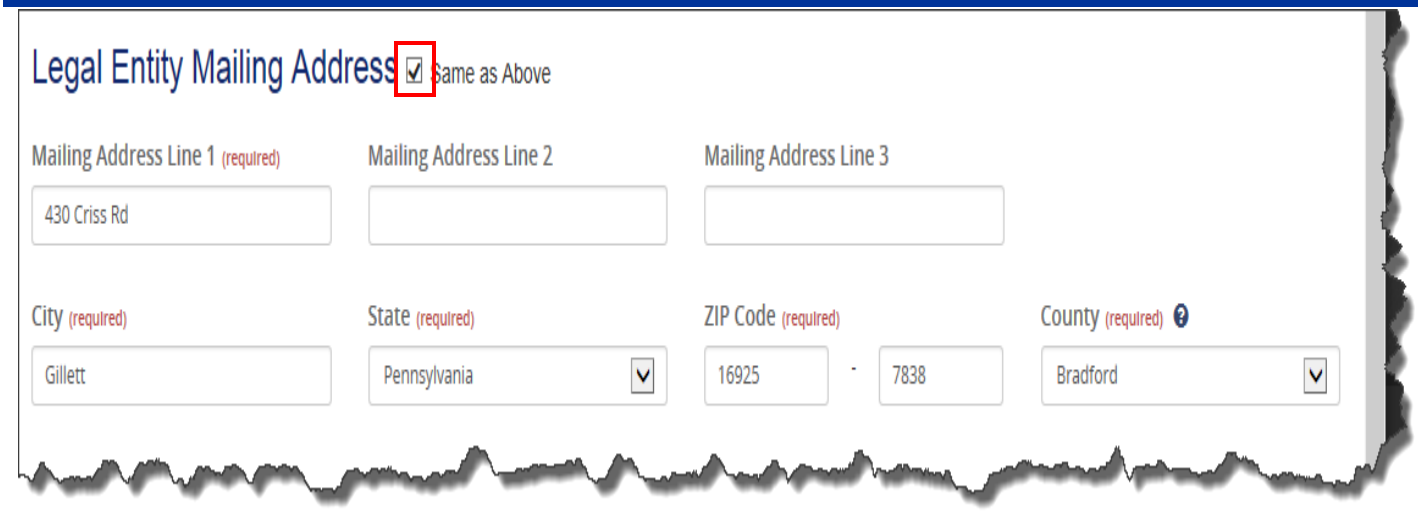


12. Enter the Legal Entity Details for the provider. Helpful hints for completing various fields on the application will appear when you click in the box to enter the information.

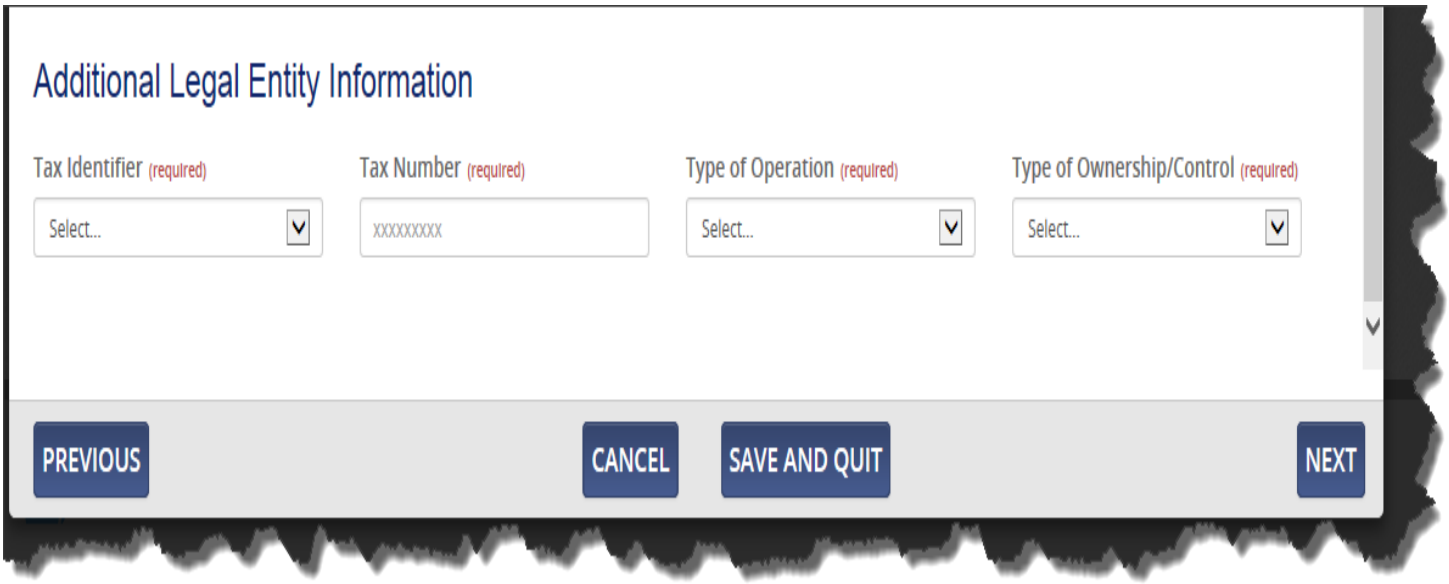


13. Continue to add the remaining Legal Entity information as requested. If the Legal Entity Mailing Address is the same as the Legal Entity information entered above, just click on the box beside Same as Above to have the information automatically entered.

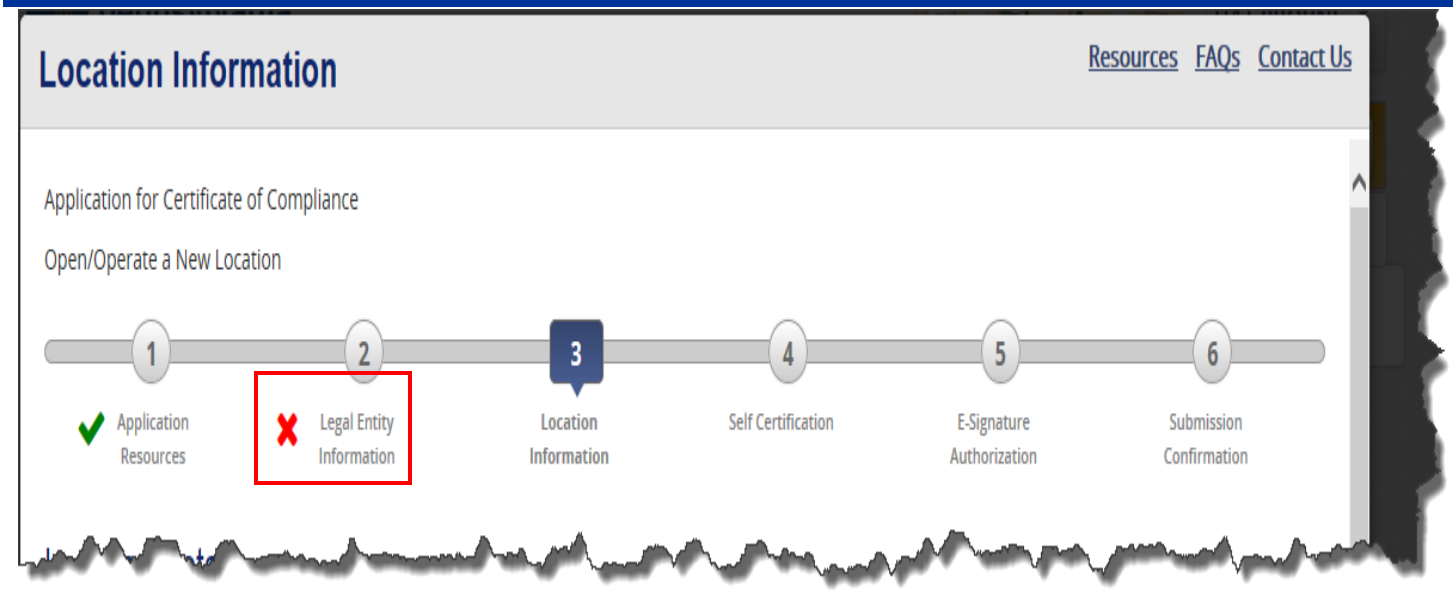




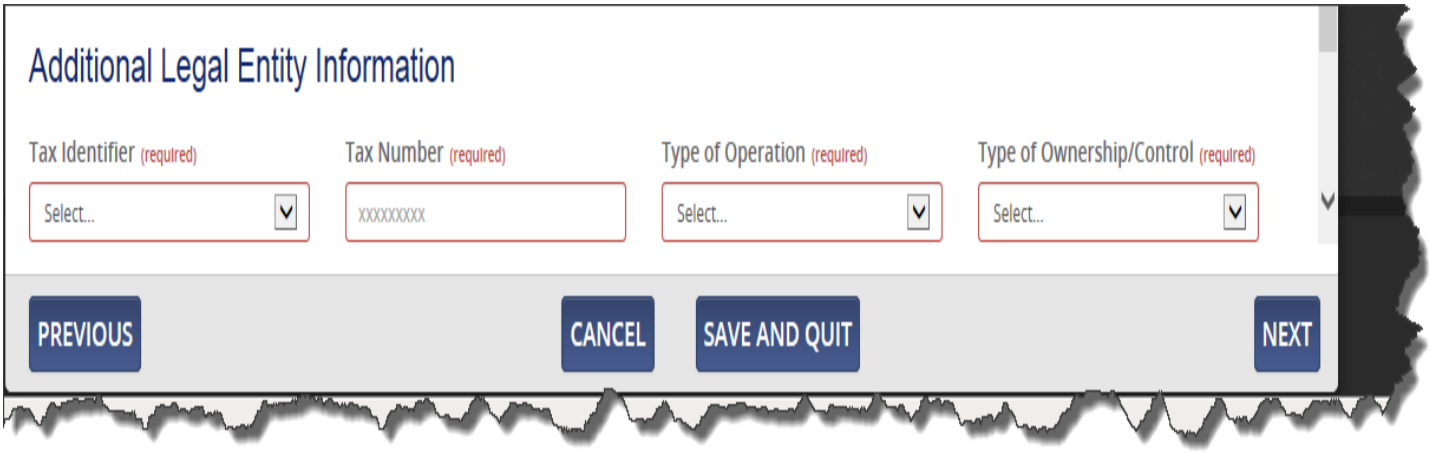
14. Enter the Additional Legal Entity Information at the bottom of the screen, then click on Next to proceed to the next screen.



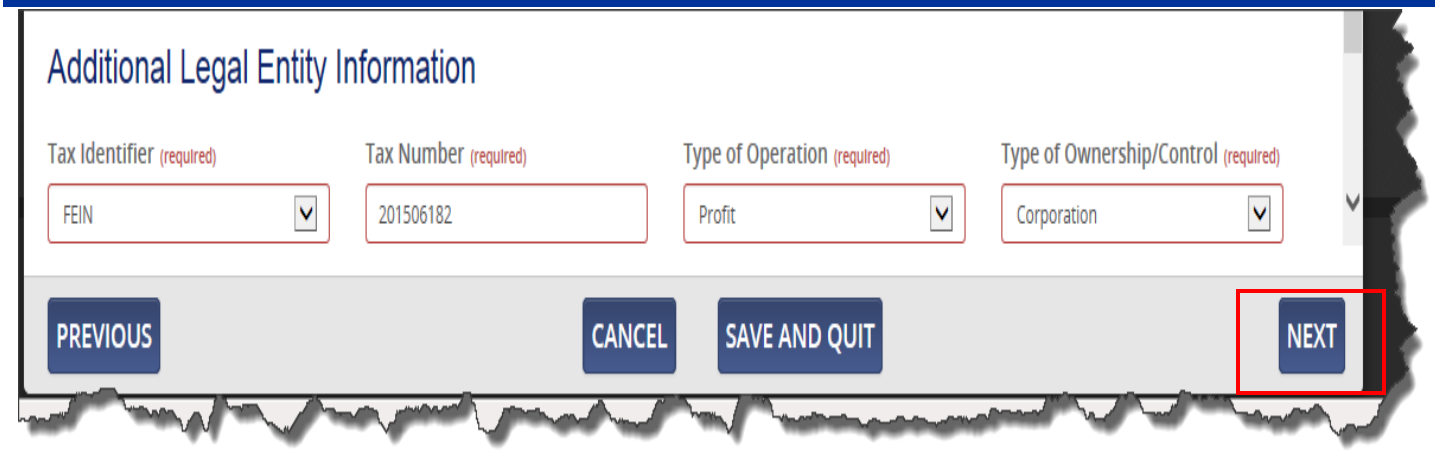
NOTE: If you neglect to enter any of the required information for the Legal Entity and then click Next, you will see a red X in the task bar at the top of the next screen. This indicates an error on that task. You can proceed with completing the application, but you will not be able to submit the application until all errors are corrected or missing data is entered. For this example, the Additional Legal Entity Information fields were completely skipped.

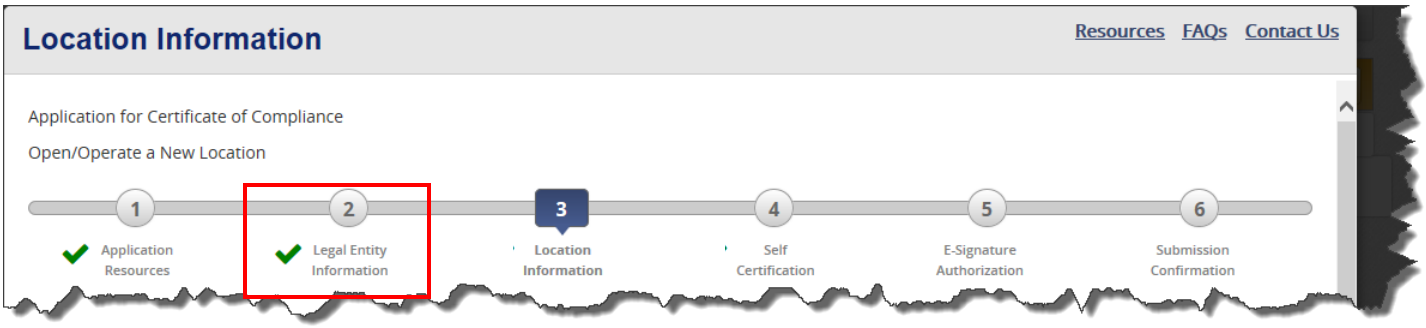


15. When errors are present on a task, you can correct them at any time in the application process, prior to actual submission of the application. Click on the task in error to be returned to the appropriate screen. In the example below, each field with missing information is outlined in red.



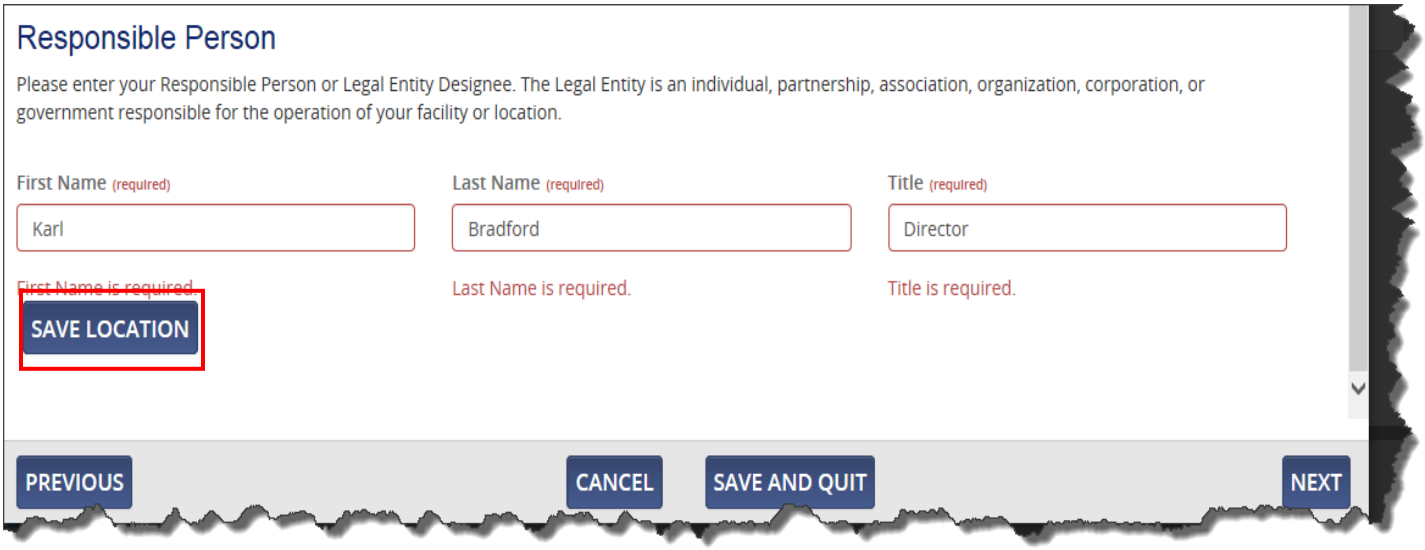
16. Enter the missing information or correct the wrong information and click NEXT when you are done. The red X will now be a green checkmark, indicating the page is complete.



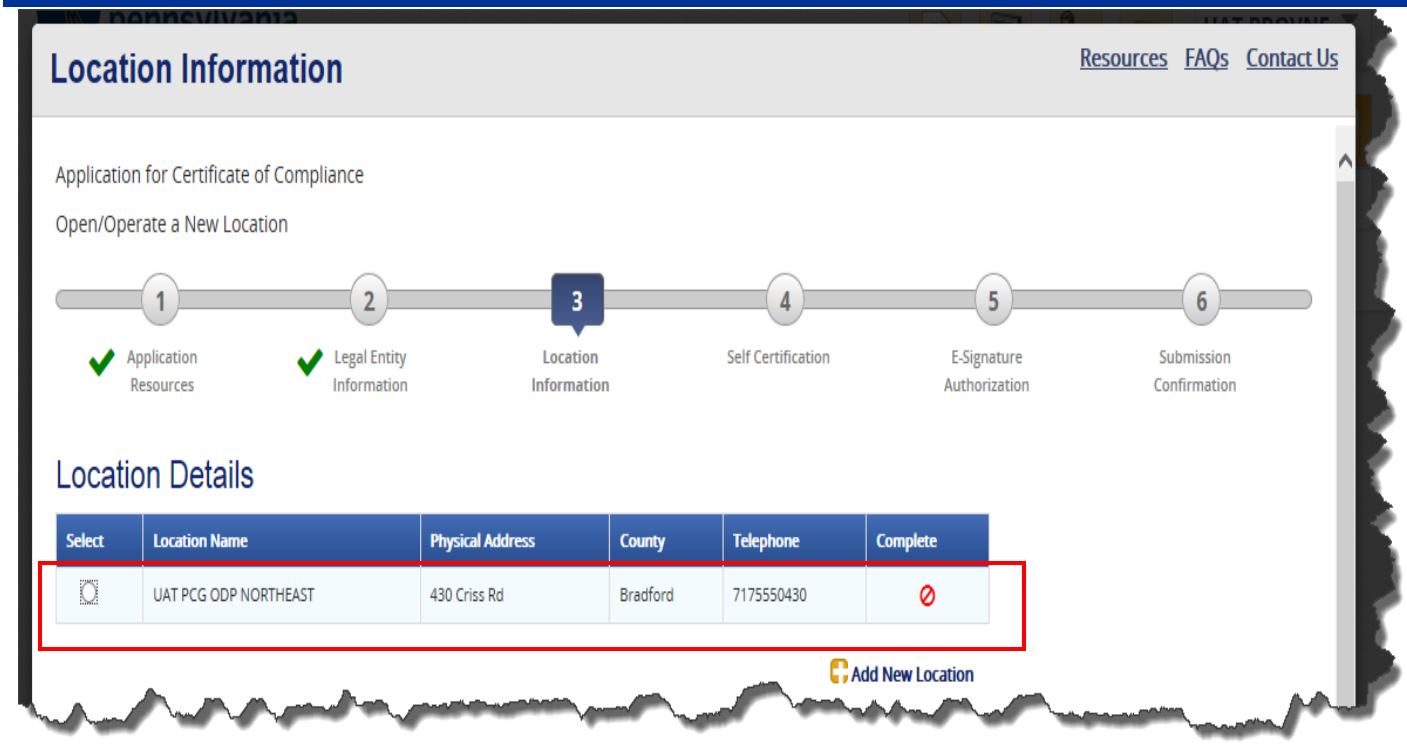


17. Enter the Location Information on the next screen, scrolling down as necessary to complete all fields. The same as for Legal Entity, you can click on Same as Above for the system to automatically enter the Location Mailing Address, if it is the same as the Location Address.
18. When all information is entered for this location, click on SAVE LOCATION.

Note: If you click on any other button at the bottom of the screen, the location information just entered will NOT be saved.

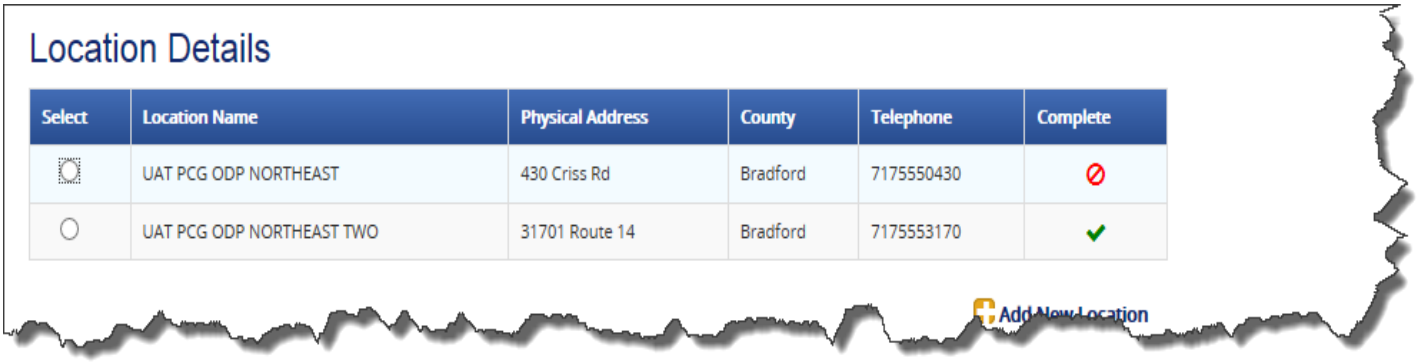


19. The location you just added will display in a table at the top of the Location Information screen.

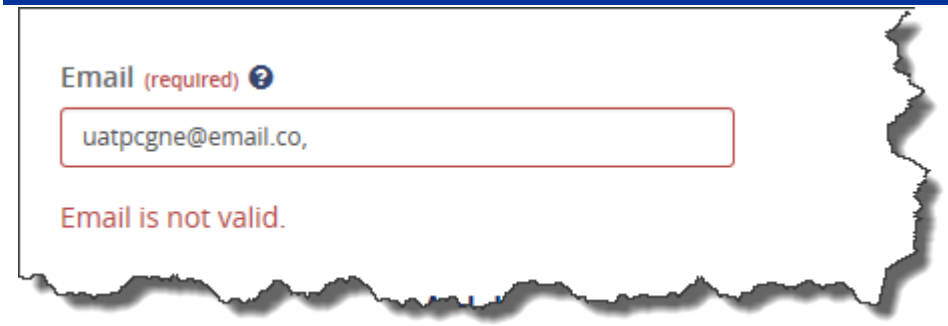


NOTE: If no errors exist in the information added for a specific location, a green checkmark will appear in the "Complete" column of the Location Details table. If errors exist for one or more locations, a red circle with a line through it will display.

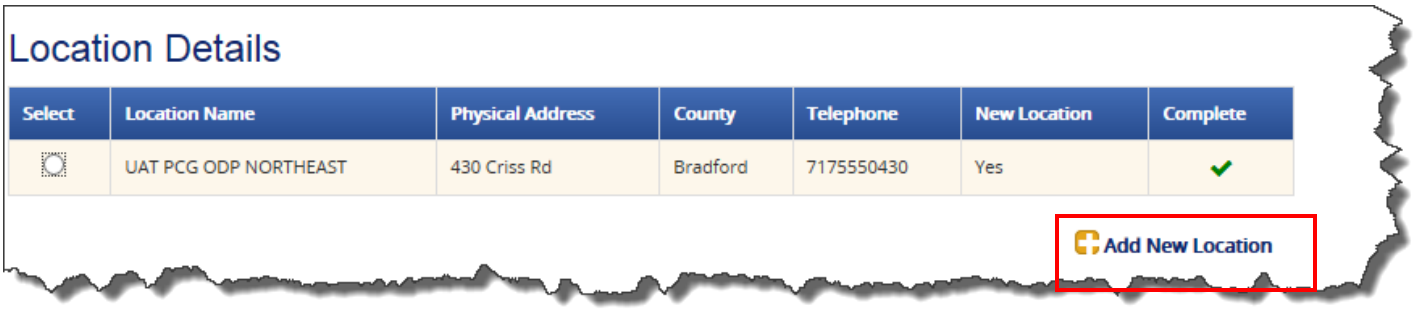
20. In this example, there is an error in the first location information. Click on the radio button for the row in error to be taken back to the information for the location.



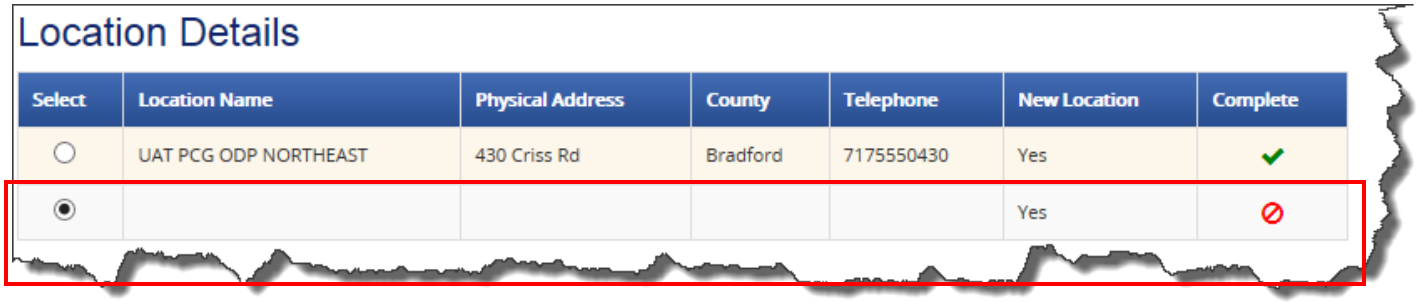
21. An error message tells you what needs to be corrected. Make the correction and then click on Save Location.

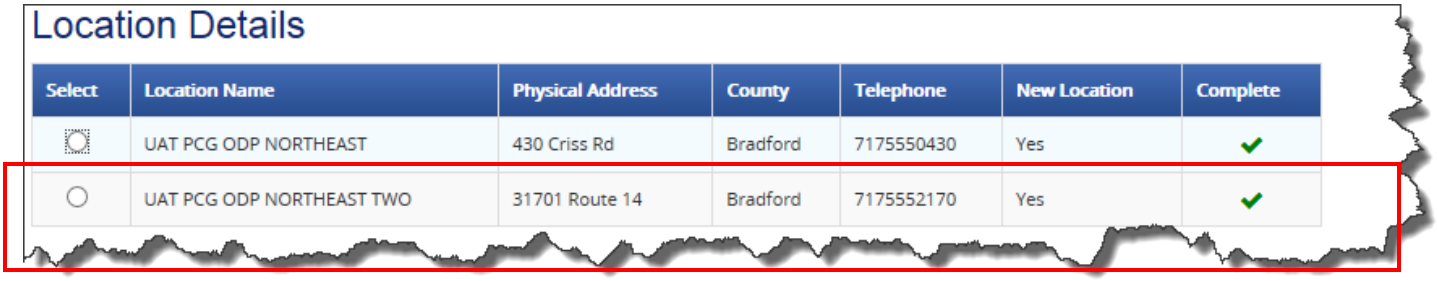


22. The location information is now correct.
23. Click on Add New Location.



Note: A blank row appears in the table. After you enter and save the new location, the information will be added to the table.



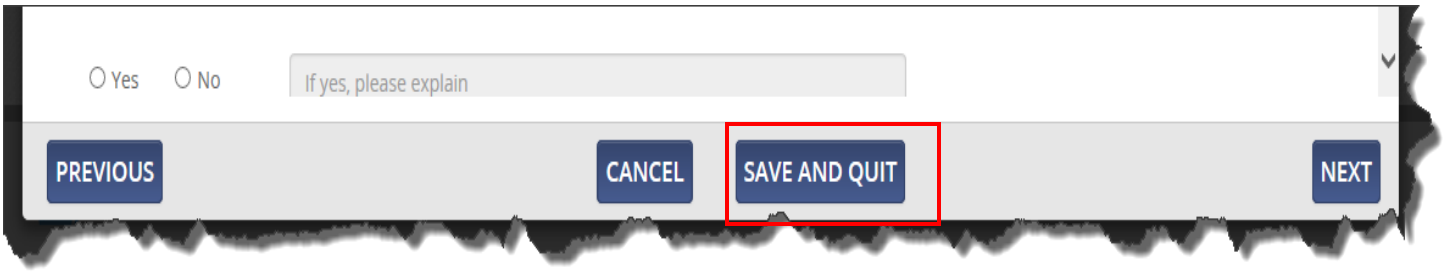


24. Repeat steps 17 through 23 until all locations are added, remembering to click on SAVE LOCATION each time. Then click on NEXT to proceed to the next task in the application process.

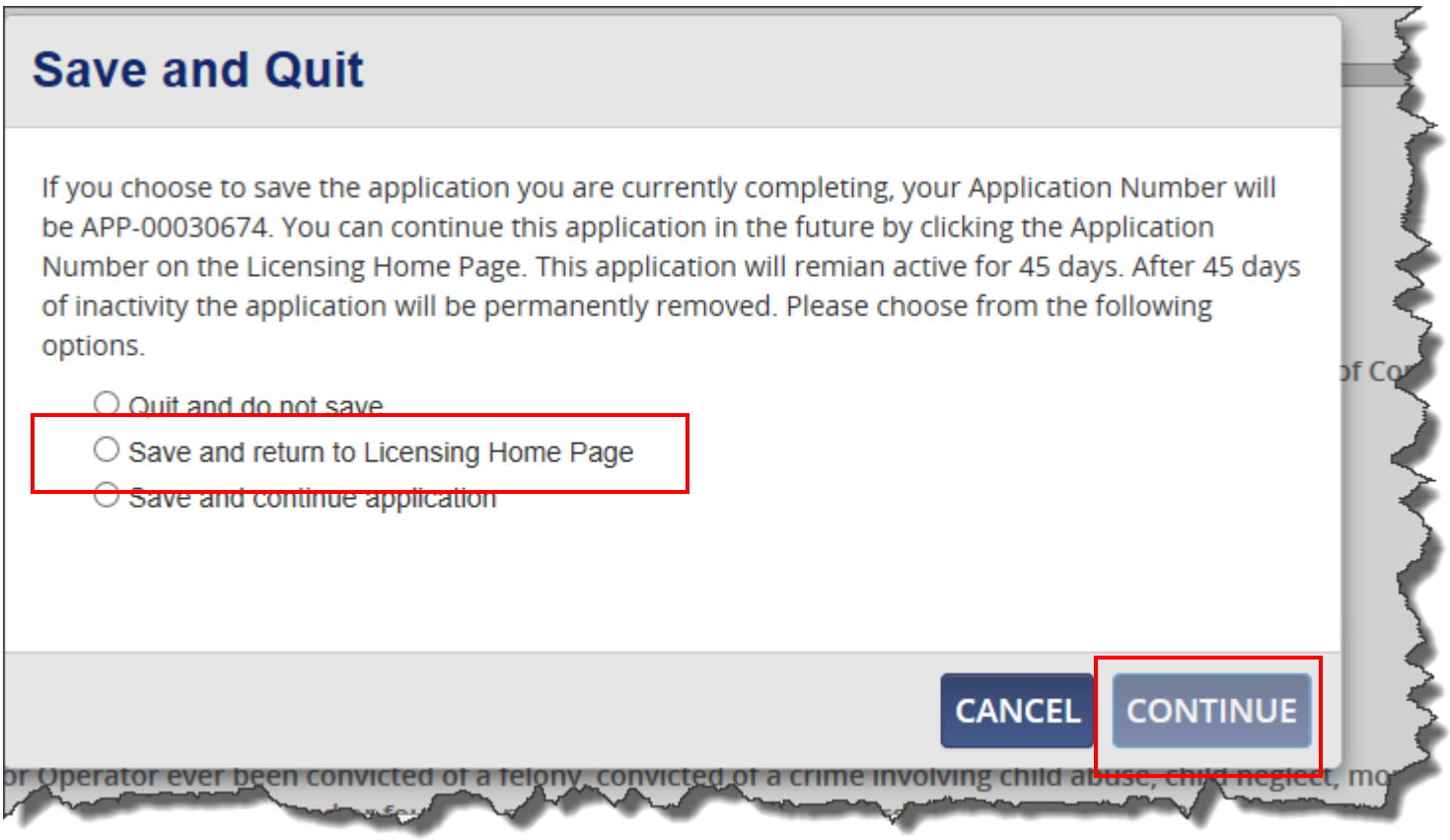
25. Complete the Self Certification information as required on this task.

Note: At any time in the application process prior to Task 6, Submission Confirmation, you can decide to save the entered information and return to it at a later time.

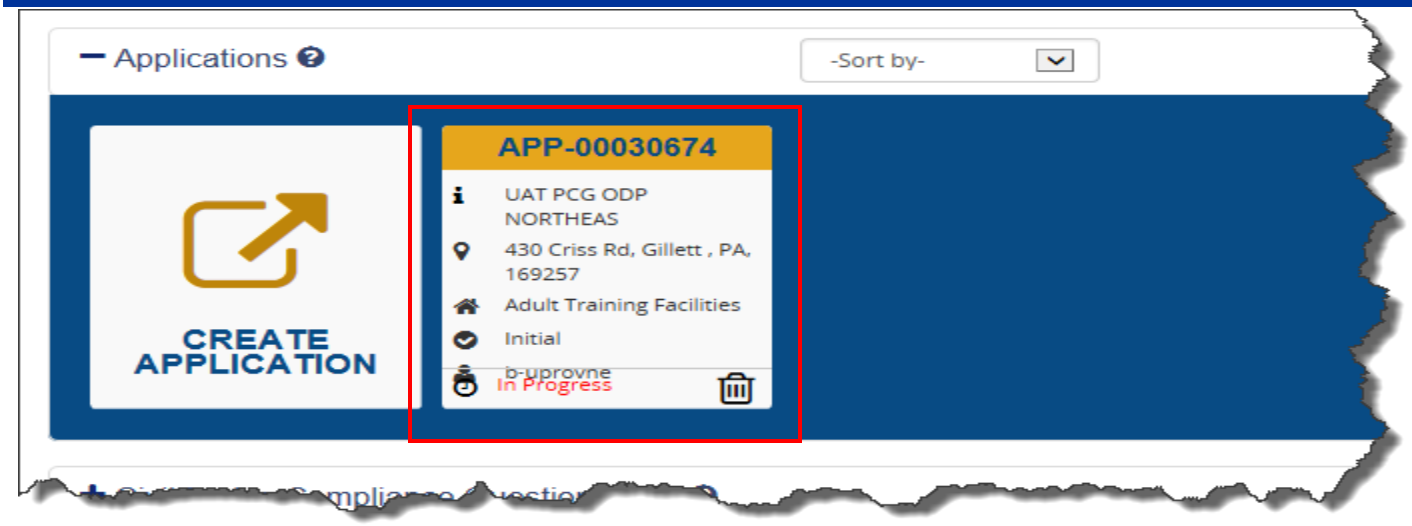
- Scroll to the bottom of the screen and click on SAVE AND QUIT.

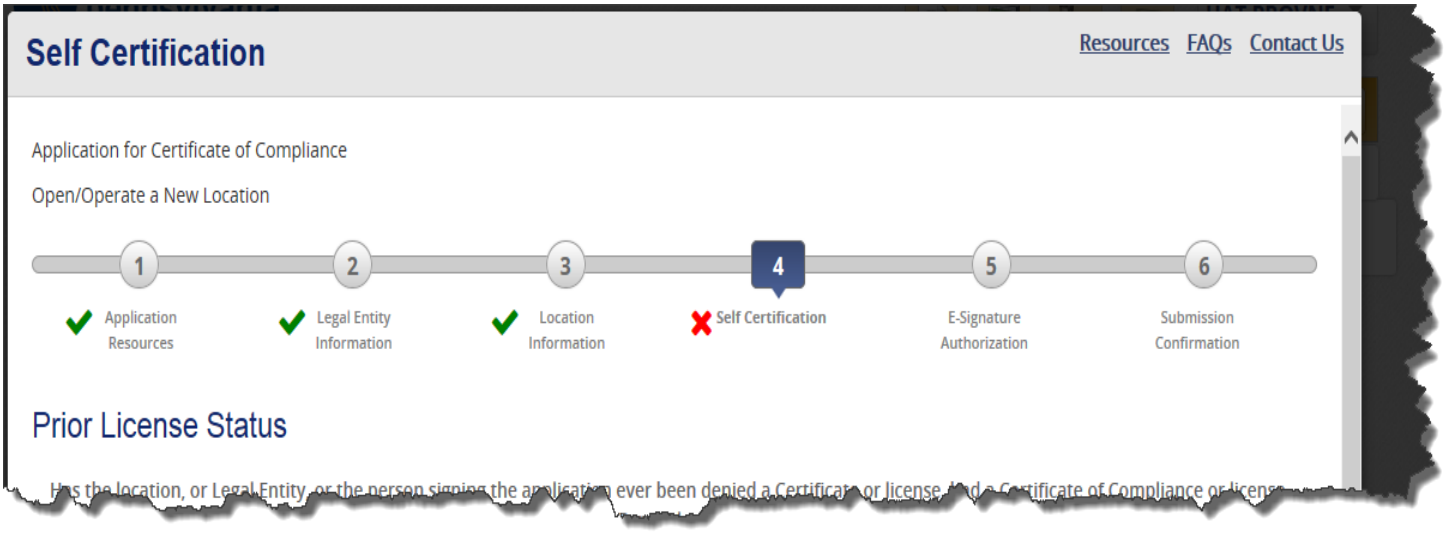


- A Save and Quit pop-up box appears, asking you to confirm what you are trying to do at this point. Be sure to make the right selection so that your work is saved. Note that an application number has been generated for this application, even though it is incomplete. Make note of the application number so that you can select it when you're ready to finish it.

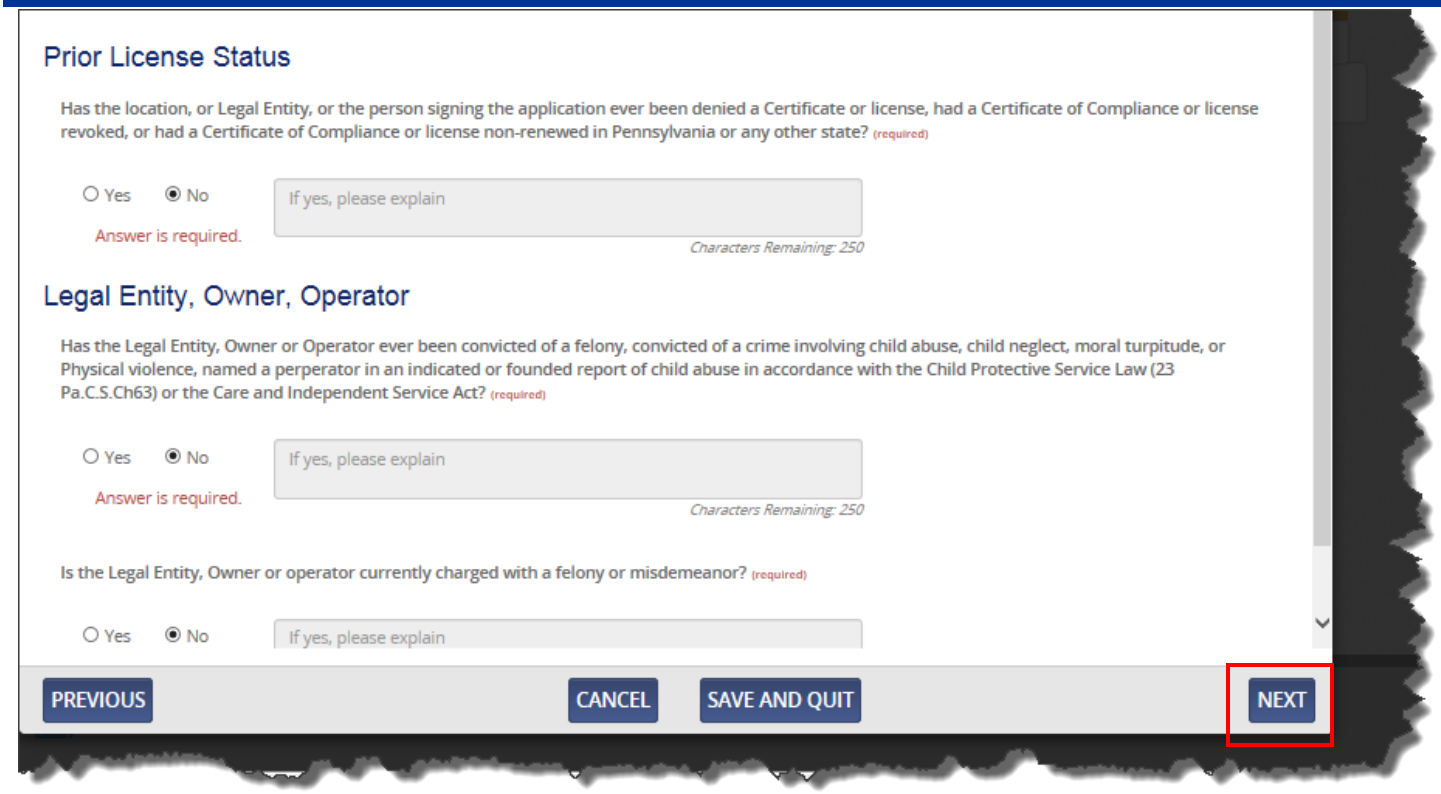


- In this example, we will Save and return to the Licensing Home Page. Click the radio button and then click CONTINUE.
- You are returned to the Licensing Home Page. When you are ready to continue working on the saved application, click on Applications, and then click on the application you started earlier. You will be taken to the screen for the first incomplete task. In this example, the Self Certification screen.

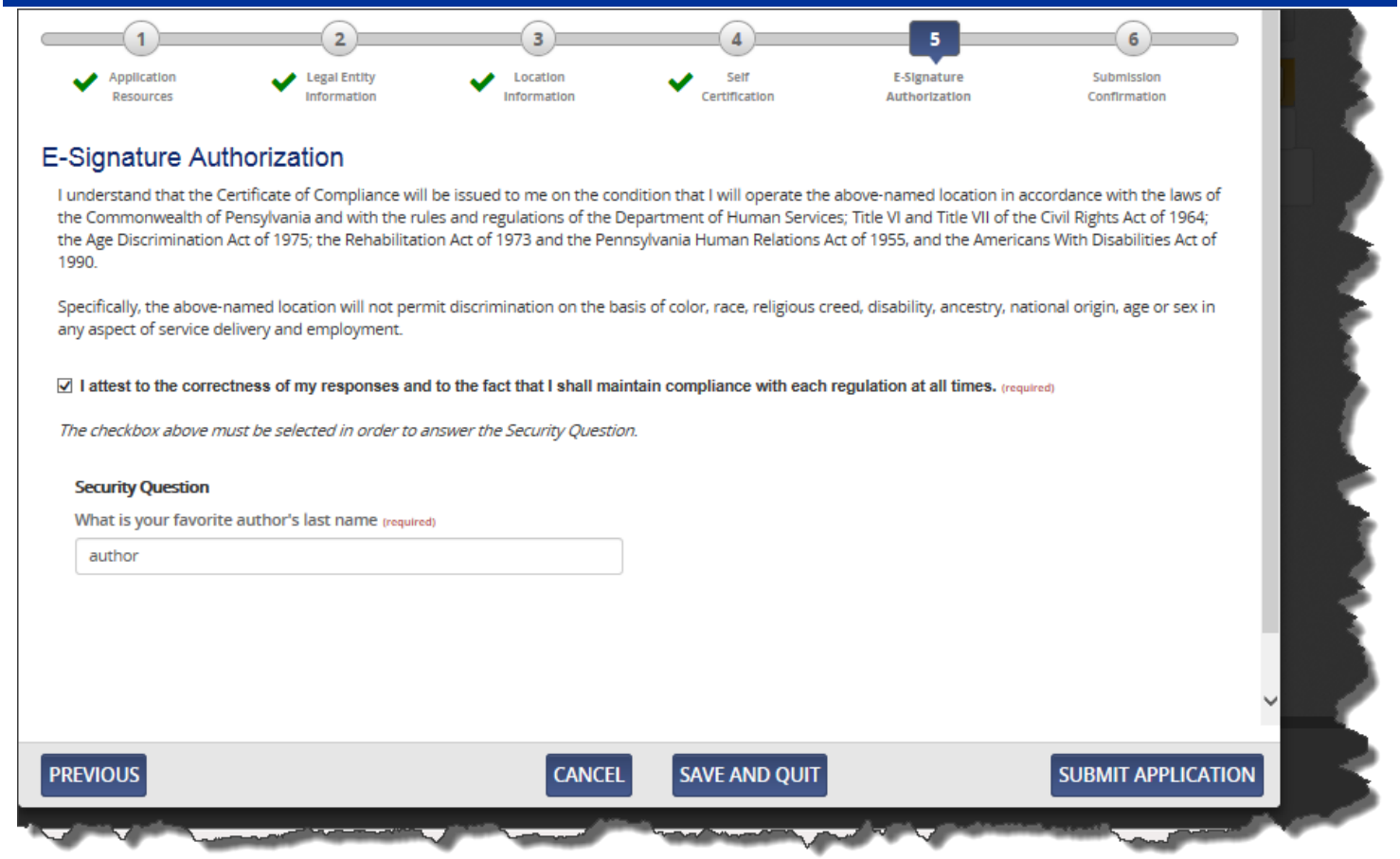




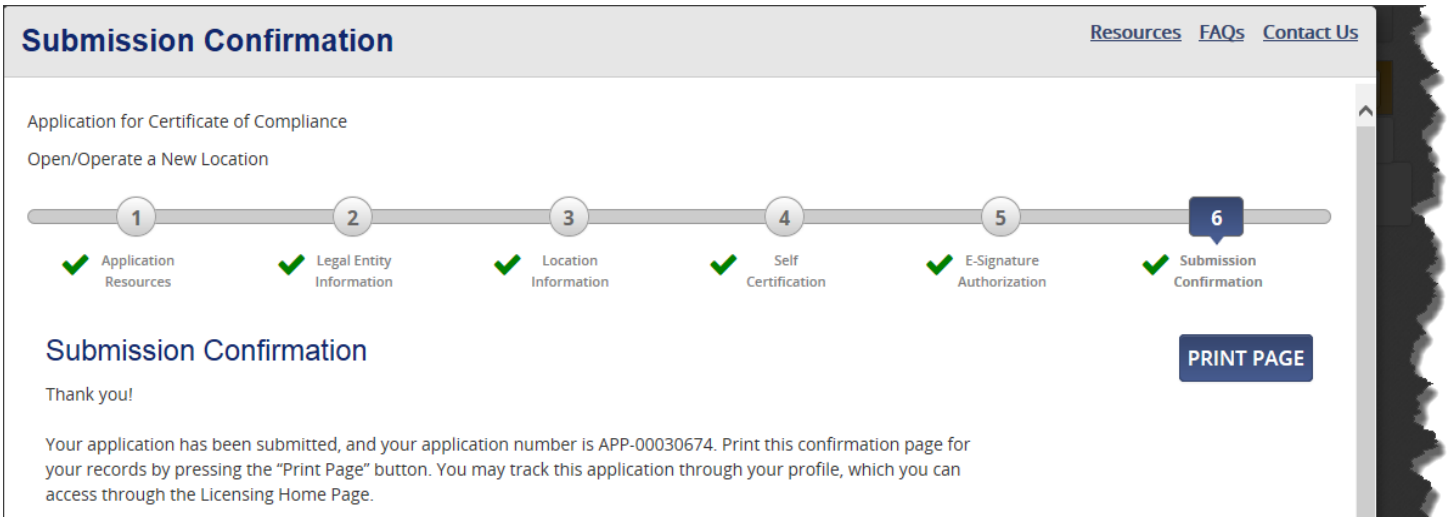
26. Answer the questions, providing explanations for any "yes" answers. When finished, click NEXT to continue.



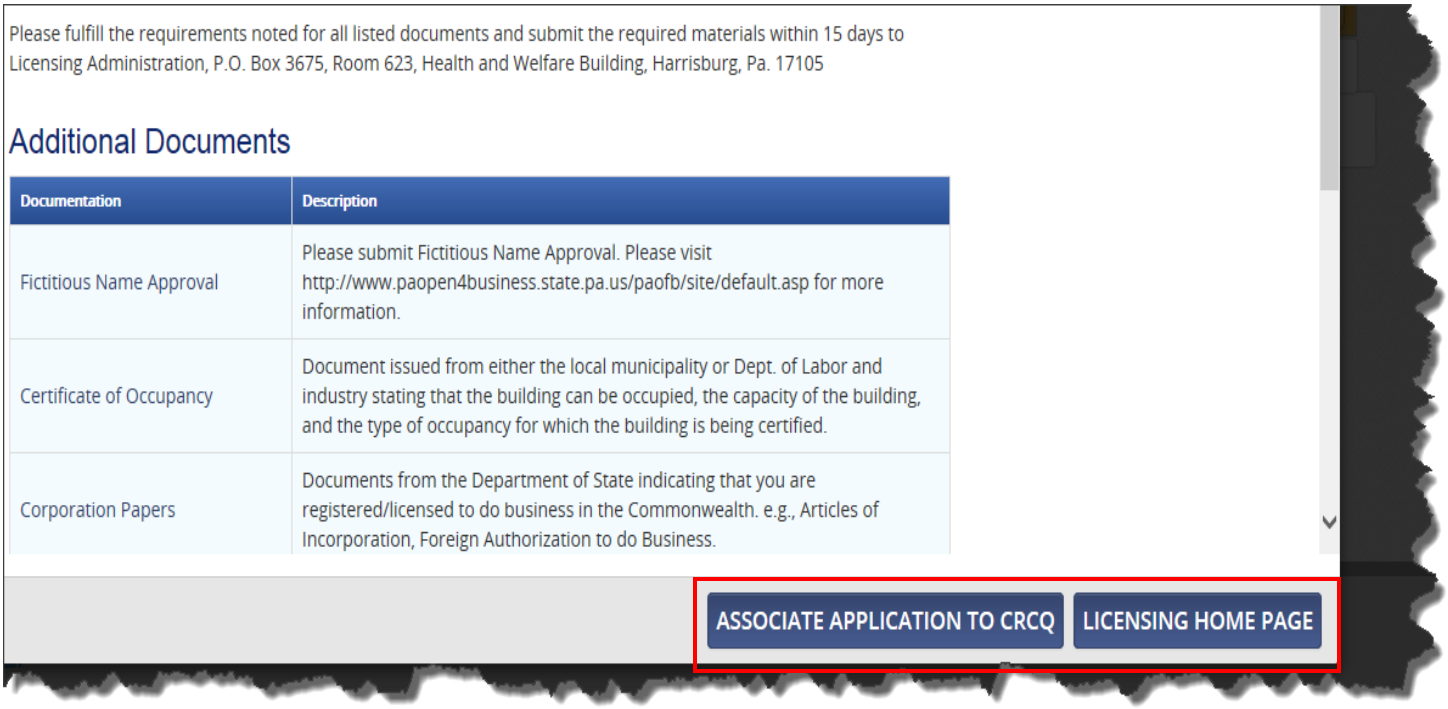
27. Complete the E-Signature Authorization page to allow electronic submission of your application. You must check the attestation box before the Security Question response field is available for entry.



28. Before clicking on Submit Application, make sure no tasks are marked with a red X. If there are any incomplete tasks, correct them as indicated earlier in this job aid. When tasks 1 through 4 each have a green checkmark, you are ready to submit your application. Click on SUBMIT APPLICATION in the lower right corner.
29. The Submission Confirmation page displays, again including your application number. You may print the page by clicking on the PRINT PAGE button.



30. In the lower half of the screen, in the Additional Documents section, you will find a list documents you must provide to complete the certification process.



Please fulfill the requirements noted for all listed documents and submit the required materials within 15 days to Licensing Administration, P.O. Box 3675, Room 623, Health and Welfare Building, Harrisburg, Pa. 17105

Additional Documents

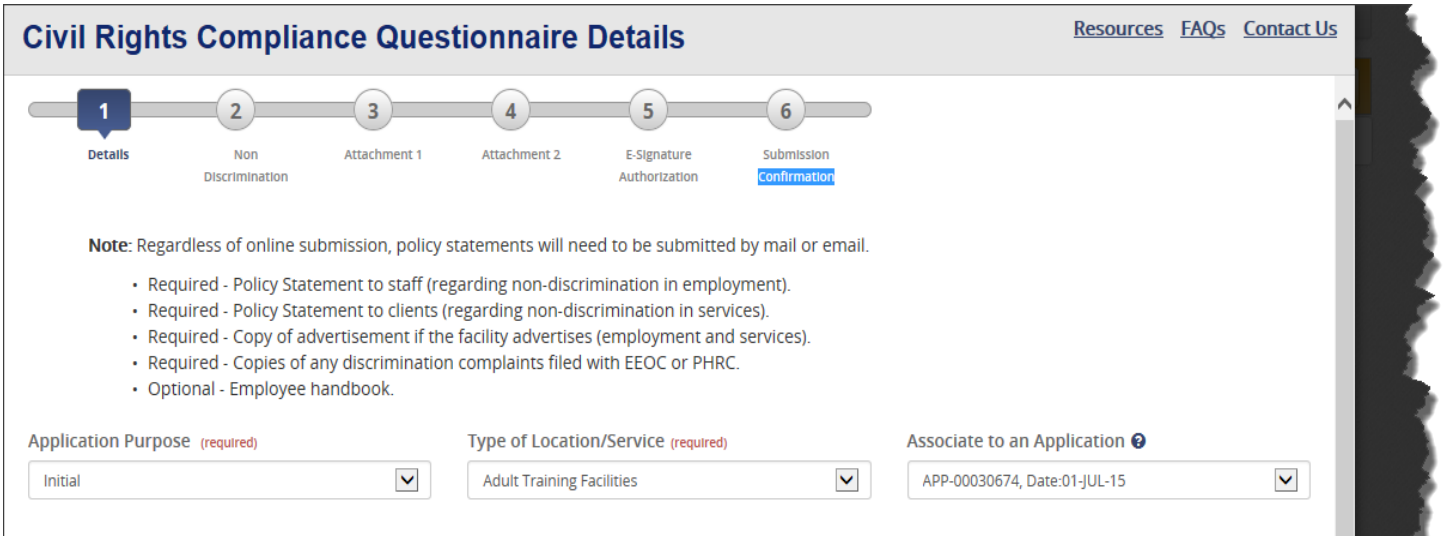
Documentation	Description
Fictitious Name Approval	Please submit Fictitious Name Approval. Please visit http://www.paopen4business.state.pa.us/paofb/site/default.asp for more information.
Certificate of Occupancy	Document issued from either the local municipality or Dept. of Labor and industry stating that the building can be occupied, the capacity of the building, and the type of occupancy for which the building is being certified.
Corporation Papers	Documents from the Department of State indicating that you are registered/licensed to do business in the Commonwealth. e.g., Articles of Incorporation, Foreign Authorization to do Business.

ASSOCIATE APPLICATION TO CRCQ | LICENSING HOME PAGE

31. From this screen, you can associate the Civil Rights Compliance Questionnaire (CRCQ) to your submitted application. If you wish to do so, proceed to the next section of this Job Aid. If you do not wish to associate the CRCQ to your application at this time, click on LICENSING HOME PAGE.

ASSOCIATING AN APPLICATION TO A CRCQ

1. Click on ASSOCIATE APPLICATION TO CRCG at the bottom of the Submission Confirmation screen. You will be directed to the Civil Rights Compliance Questionnaire Details. The application purpose, type of location and application number, as well as the Legal Entity Information is automatically completed from the application information.



Civil Rights Compliance Questionnaire Details

Resources FAQs Contact Us

1 Details | 2 Non Discrimination | 3 Attachment 1 | 4 Attachment 2 | 5 E-Signature Authorization | 6 Submission Confirmation

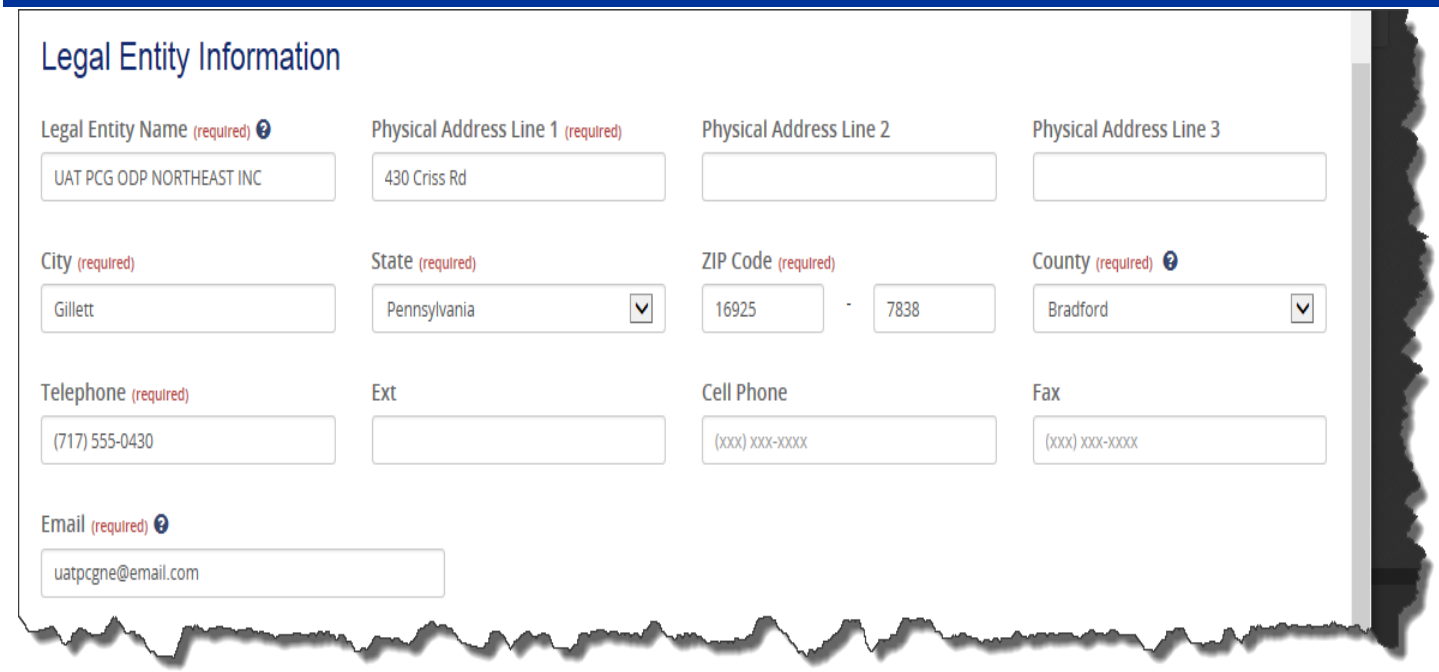
Note: Regardless of online submission, policy statements will need to be submitted by mail or email.

- Required - Policy Statement to staff (regarding non-discrimination in employment).
- Required - Policy Statement to clients (regarding non-discrimination in services).
- Required - Copy of advertisement if the facility advertises (employment and services).
- Required - Copies of any discrimination complaints filed with EEOC or PHRC.
- Optional - Employee handbook.

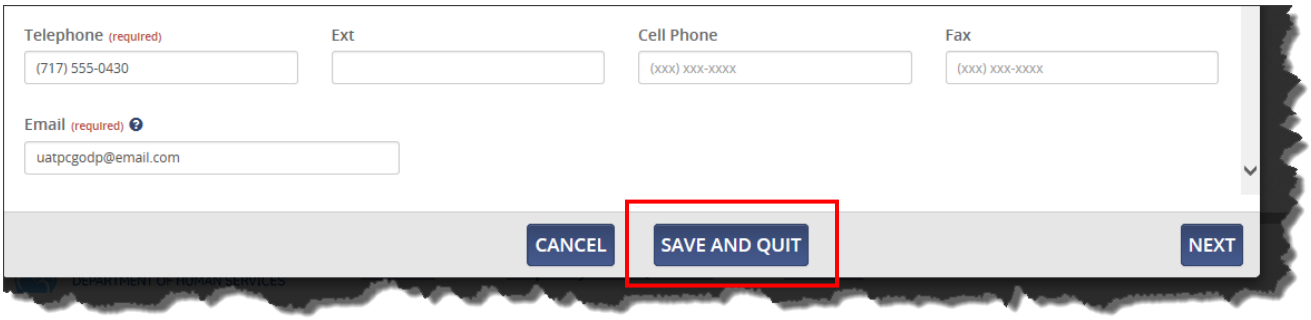
Application Purpose (required): Initial

Type of Location/Service (required): Adult Training Facilities

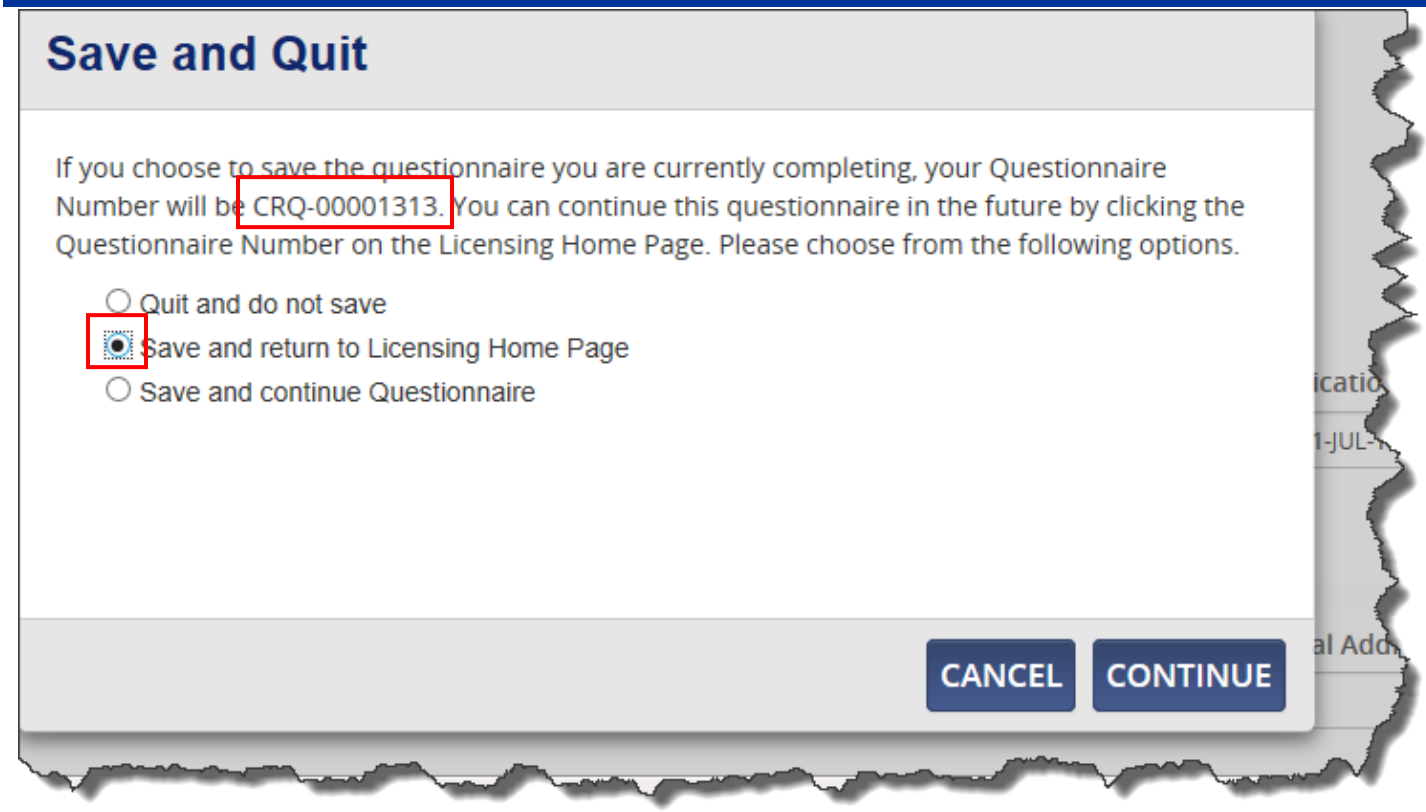
Associate to an Application: APP-00030674, Date:01-JUL-15



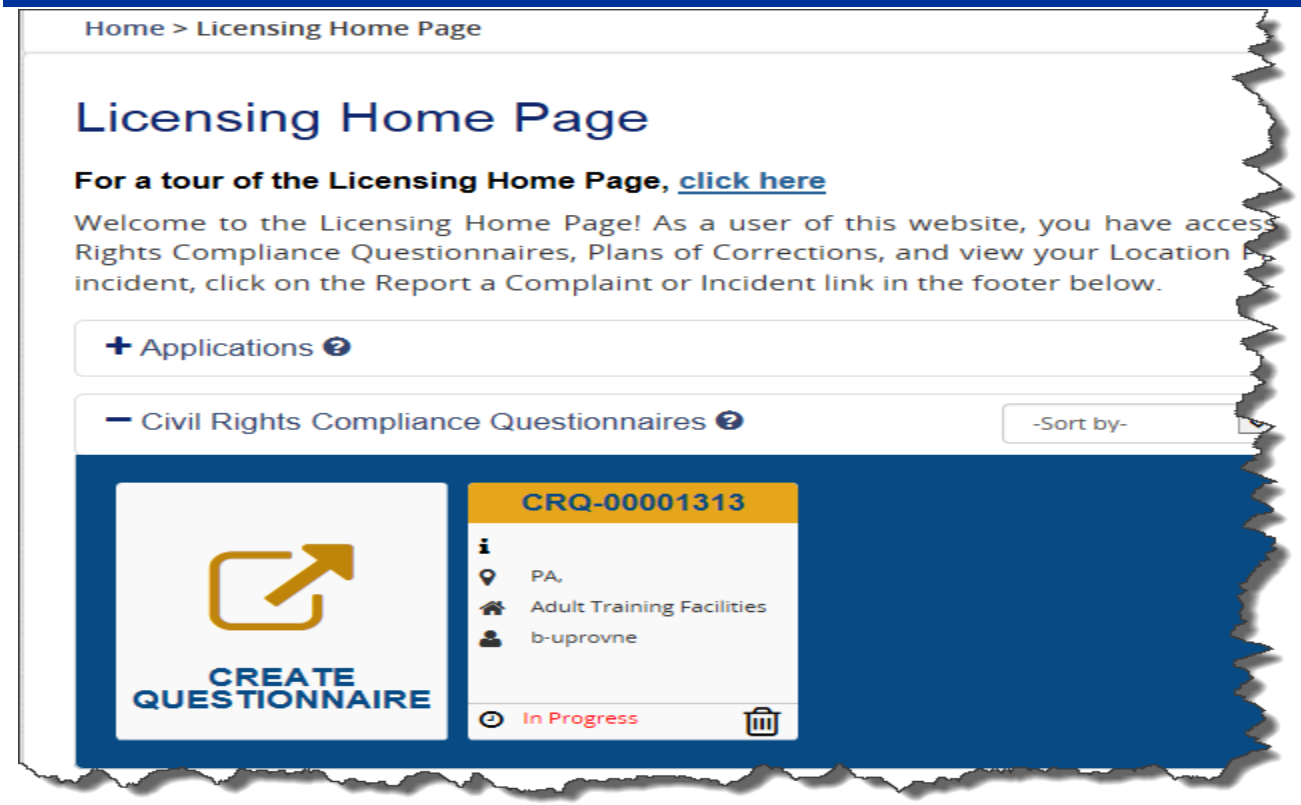
2. Scroll to the bottom of the page and click on SAVE AND QUIT to save this CRCQ, so that it can be completed at a later time. A pop-up box will appear, asking you to select to save or not save the questionnaire.



3. Select the radio button for Save and return to Licensing Home Page. Notice that a reference number has been assigned to the CRCQ, for later use.



4. Click on CONTINUE.
5. The Licensing Home Page displays. In the Civil Rights Compliance Questionnaires section, the number "1" displays on the right, indicating that there is an incomplete CRCQ.
6. Click on Civil Rights Compliance Questionnaires to open the display area. Notice that the incomplete CRCQ is listed as In Progress.



7. Refer to the Job Aid "Submitting CRCQs in Provider Access" to complete the CRCQ application.

Note: If you are done working in CLS, you can log out by clicking on the down arrow by your User Name in the top right corner, then on Logout.