Texas Department of Family and Protective Services

Provider Portal Job Aid

1/10/2025

Version 8.00

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Introduction

Overview

From the Provider Portal, providers can manage their administrator and caregiver information, see caregivers training status, and manage Attachment A certification process for GRO providers. GRO caregivers will use the Provider Portal to acknowledge and certify an Attachment A document.

Purpose

The purpose of this job aid is to outline the process to login, create accounts, and manage an organization's administrators and caregivers. For GRO Providers, excluding Child Specific Contracts placements, this job aid details how to assign children to caregivers and how to electronically provide caregivers an Attachment A document.

Scope

The scope of this **Provider Portal Job Aid** is to explain how to navigate the Provider Portal. Specifically, the job aid focuses on the process of creating and manage profiles for administrators and caregivers and how to review course completion activities. Additionally, for GRO providers (excluding Child Specific Contracts placements with a GRO), the job aid details how to assign a caregiver to a child and monitor the process for the status of the Attachment A certification process. This job aid will review the **Home**, **Administrators**, **Caregivers**, **View Children**, **Course Completions Statuses**, and **Details tabs**. The document will also provide answers to frequently asked questions.

Definition

For the purposes of the Provider Portal, "Providers" are defined as General Residential Operations (GROs), Child Placing Agencies (CPAs), childcare providers contracted with Single Source Continuum Contractors (SSCCs), Foster and Adoptive Home Development (FAD) homes, State Supplemental Caregivers, and caseworkers entering on behalf unlicensed kin.

Registration and Login

Provider Registration

Provider accounts and Provider Portal Primary Administrators (Primary Administrators) are registered into the Provider Portal by the Department of Family and Protective Services (DFPS) staff. Primary Administrators are responsible for managing their organization's account and profiles, which includes creating new administrator and caregiver profiles, inactivating profiles, and ensuring data quality for their organization.

Each Provider may have only one Primary Administrator and is strongly encouraged to designate one or more Secondary Administrators. Secondary Administrators are registered into the Provider Portal by the provider's Primary Administrator. One administrator, either primary or secondary, should have the indicator of Provider Training Compliance POC selected in their profile.

Primary and Secondary Administrator Login

When a primary or secondary administrator has a profile created in the portal, a "Welcome to the Provider Portal" email is automatically forwarded to the administrator. The email contains a link to the Provider Portal and the administrator's **username**. If you are registered with multiple provider accounts, your username is different for each account.

Follow the steps below to login to the Provider Portal for the first time:

1. Open the "Welcome to the Provider Portal" email that includes the link to the Provider Portal and your username.
   - **Important**: Please make note of your username.

2. Copy the link in the email, then paste it into a Microsoft Edge, Google Chrome, Firefox, or Safari browser. Do NOT use Internet Explorer. For a better user experience, Chrome is preferred.

3. The Change Your Password page displays. Enter a new password into the **New Password** field, re-enter the password into the **Confirm New Password** field, then select **Change Password**.

   - **Note**: Passwords are case sensitive.

4. The Provider Portal Home page displays. Bookmark the website or add the website to your Favorites (recommended.)

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How to Add a New Secondary Administrator

Only primary administrators can add secondary administrators to the system. Follow the steps below to add a new secondary administrator to the system:

1. From the Provider Portal Home, select the **Administrators tab**.

2. The Administrators list opens. Use the **Search bar** or read the **Administrator list** to confirm the person you are adding does **NOT** have a profile already.
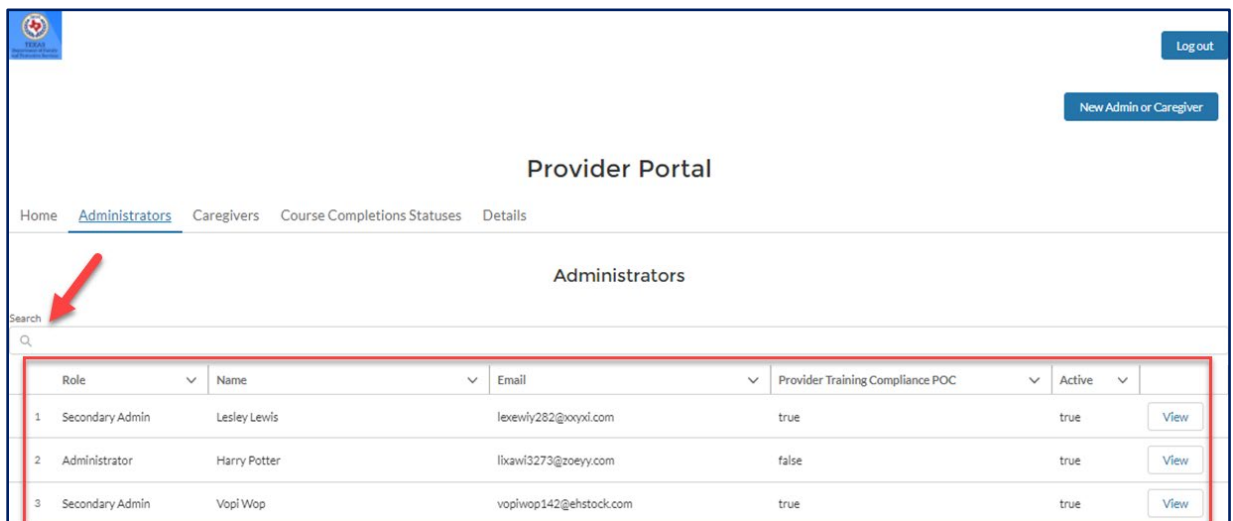
3. Select the **New Admin or Caregiver** button in the top right corner of the page.

4. The Select Action options display. Select **New Secondary Admin**, then select **Create**.

5. The New Secondary Admin page displays. Enter the new secondary administrator's **profile information** into the fields, then select **Next**.

- **Note:** Required fields have an asterisk (*) shown next to field name.

6. A message displays, confirming that the secondary administrator was created. Select **Finish**.
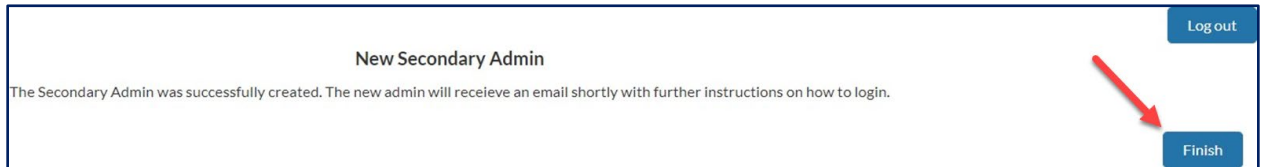
After you select **Finish**, the newly created Secondary Administrator will receive an email with further instructions.

Note: If the message displayed states "Your request cannot be processed at this time. The site administrator has been alerted," this indicates the email is already in use by another DFPS application within the Salesforce platform, such as Awake Check. Use another email address or contact the Help Desk for assistance. The Help Desk contact information is in the last section of this job aid.

How to Add a New Caregiver

Primary and secondary administrators can add new caregivers to the system. Follow the steps below to add a new caregiver to the system:

1. From the Provider Portal Homepage:
   - If you are a **primary administrator**, select the **New Admin or Caregiver** button in the top right corner of the page.
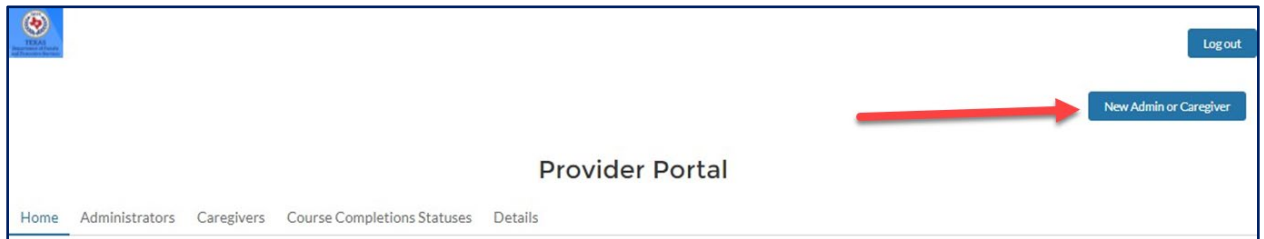
   - If you are a **secondary administrator**, select the **New Caregiver** button in the top right corner of the page.
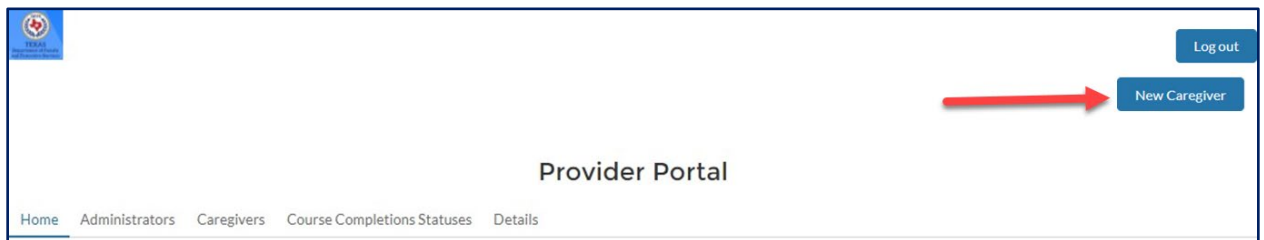
2. The Select Action options display. Select **New Caregiver**, then select **Create**.

3. The New Caregiver page opens. Enter the new caregiver's **SSN/ITIN** (Social Security Number/Individual Taxpayer Identification Number) using XXX-XX-XXXX format (with the dashes included) into the search field, then select **Search**.

- If the **SSN/ITIN does not exist**, skip to **Step 6**.
- If the **SSN/ITIN** already **exists** in the system, proceed to **Step 4.**

4. The Caregiver Info displays. Enter the caregiver's **start date** at your Provider organization into the **Date Started as Caregiver** field.

- **Date Started as Caregiver** is the prospective date the Caregiver will begin caring for child(ren).
- **NOTE:**
    - To attain compliance, the **Date Started as Caregiver** must be after the date when the Caregiver will take the training.
    - **No caregiver should be allowed to care for children without first completing required training.**
        - For **CPS/CPI Staff as Caregivers**, use the date the individual staff begins as a Caregiver.
        - For **Other DFPS Staff as Caregivers**, use the date the individual staff begins as a Caregiver.
        - For **KIN Caregivers**, use the most current KIN placement start date.
        - For **FAD/ICPC Caregivers**, use the most current FAD/ICPC placement start date.
        - For **CPA Caregivers**, use the CLASS verification start date.
        - For **GRO Caregivers**, use the date after Caregiver training is completed or the actual date the individual staff is scheduled to begin work as a caregiver.

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5. Select **Add to Provider**. Skip to **Step 11**.

6. If the SSN/ITIN does not exist in the system, you will have the option to select Create a new Caregiver or Enter a different SSN/ITIN. Select **Create a new Caregiver**, then select **Next**.

7. The New Caregiver page displays. Enter the new caregiver's **Legal First Name**, **Legal Last Name**, **Legal Middle Name**, **Birthdate**, **Email Address**, and **Date Started as Caregiver** at your Provider organization into the respective fields. *Email Address required only for GRO Caregivers.*

Note:

- o When entering new Caregivers, use the prospective date the Caregiver will begin caring for child(ren) as the **Date Started as Caregiver**.
- o To achieve compliance, the **Date Started as Caregiver** must be after the date when the Caregiver will take the training.
- o **No caregiver should be allowed to care for children without having first completed the training.**
  - ▪ For **CPS/CPI Staff as Caregivers**, use the date the individual staff begins as a Caregiver.
  - ▪ For **other DFPS Staff as Caregivers**, use the date the individual staff begins as a Caregiver.
  - ▪ For **KIN Caregivers**, use the most current KIN placement start date.

- For **FAD/ICPC Caregivers**, use the most current FAD/ICPC placement start date.
- For **CPA Caregivers**, use the CLASS verification start date.
- For **GRO Caregivers**, use the date after Caregiver training is completed or the actual date the individual staff is scheduled to begin work as a caregiver.

8. Select **Add to Provider**.

9. A message displays stating that the individual must take the required training course. Select **Proceed**.

10. A message displays stating that the Caregiver was successfully added to the current Provider. Select **Finish**.

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11. After a caregiver has been added to the Provider organization, the Provider may inform the Caregiver that they should complete the required training course in the Caregiver Training Hub.

How to Assign a Caregiver to a Child

Primary and secondary administrators for GRO provider accounts can assign a caregiver to a child so an Attachment A form can be emailed to and acknowledged by the caregiver(s). This feature is not available for children placed via a Child Specific Contract. Follow the steps below to associate a child to a caregiver:

1. From the **View Children** tab, select the PID hyperlink for the child who a caregiver will be assigned.

2. The **Children Details** page will open in a new window keeping the current tab open.

3. Click the **Assign Caregivers** button in the upper right-hand corner of the screen to assign a new caregiver on the **Assign New Caregiver** page.

4. Click the box located before the caregiver's name to select one or more caregivers from the list of all qualified caregivers (i.e., are active and completed mandatory training). If the person of interest is not listed, click the **Back** button in the upper-left-hand corner of the screen to cancel.

5. Click the **Assign Selected Caregivers** button in the upper right-hand corner of the screen to assign the selected person(s) to the child.

6. Once caregivers are assigned to a child, an email notification will be sent to the caregiver requesting they acknowledge and certify having read the Attachment A document.

Sandbox: A new Child has been assigned to you

Caregiver Notification

Tuesday, June 11, 2024 1:42:48 PM

You have been assigned as a caregiver for a child in care in the DFPS Provider Portal for a child who has a history of sexual aggression, sexual victimization, or a sexual behavior problem.

Before you may be responsible for a child in care, you must read each child's Attachment A if a child has a history of sexual aggression, sexual victimization or a sexual behavior problem. As proof of this notification, you must acknowledge having read Attachment A in the DFPS Provider Portal.

Please use the link below to read and acknowledge the Attachment A for the child whom you have been assigned as the caregiver:

Click here

Please contact the operation if you are no longer working or temporarily not available and still receiving email notifications

Provider Portal Overview

Home Tab

After logging into the Provider Portal, you will be taken to the **Home** tab. There are two sections on this page - Provider Info and Your Info (Administrator). All the administrators can view the **Provider Info** section; however, the ability to **Edit** the **Provider Info** is limited to the provider's Primary Administrator. When entering or editing information, the required fields are marked with an asterisk (*).

How to Edit Provider Info

Only Primary Administrators can edit the Provider Info section. Follow the steps below to edit this section:

1. Select the **Edit** button on the right side of the Provider Info section. The screen will open in a view that allows for changes to be made.

2. Modify the values as needed, then select **Update** to save changes. Select **Cancel** to discard changes without saving.

How to Edit Your Info (Administrator)

The **Your Info (Administrator)** section contains information specifically for the person logged into the Provide Portal. All users have an **Edit** button and can make modifications as needed. The **Email** field is not editable.

Follow the steps below to edit the Your Info section:

1. Select the **Edit** button on the right side of the Your Info section. The screen will open in a view that allows you to edit the applicable fields.

2. Modify the values as needed, then select **Update**. Select **Cancel** to cancel the edit and discard changes.

Note: The information icon is shown when in edit mode for some fields. Place your cursor on the icon to display helpful information pertaining to that field. (Example: **Provider Training Compliance POC?**).

Figure 1: Information icon.

Administrators Tab

The Administrators tab is a list of all the administrators associated with a provider account. The Administrators tab displays the **Role**, **Name**, **Email**, **Provider Training Compliance POC**, and **Active** fields. Additionally, there is a **View** button next to each row. When the View button is selected, the selected profile will open in the Details tab.

The following are **Administrators tab** functionalities:

- **Search**: Enter a value to limit the number of profiles displayed.
- **Sort**: Select a row header to sort by that field (ascending or descending). If the list is sorted an arrow, pointing up/ascending or down/descending, will appear next to the header row name.
- **Wrap Text or Clip Text**: Select the down-arrow on the right side of a column heading to select either to Wrap Text or Clip Text.
  - **Wrap Text** allows for the entire data in a field to be viewed.
  - **Clip Text** fits the data to the space allotted; thus, if information is cut off, leader dots will be displayed to indicate more information is available.
- **View**: Select the **View** button to display profile information for a specific administrator. Selecting the View button will open the selected profile on the **Details** tab.

Caregivers Tab

The **Caregivers** tab provides a listing of all caregivers associated with a provider account. The Caregivers tab displays **Name**, **Birthdate**, **Created by Admin Name**, and **Active** fields. Additionally, there is a **View** button next to each row. When the View button is selected, the selected profile will open in the **Details** tab.
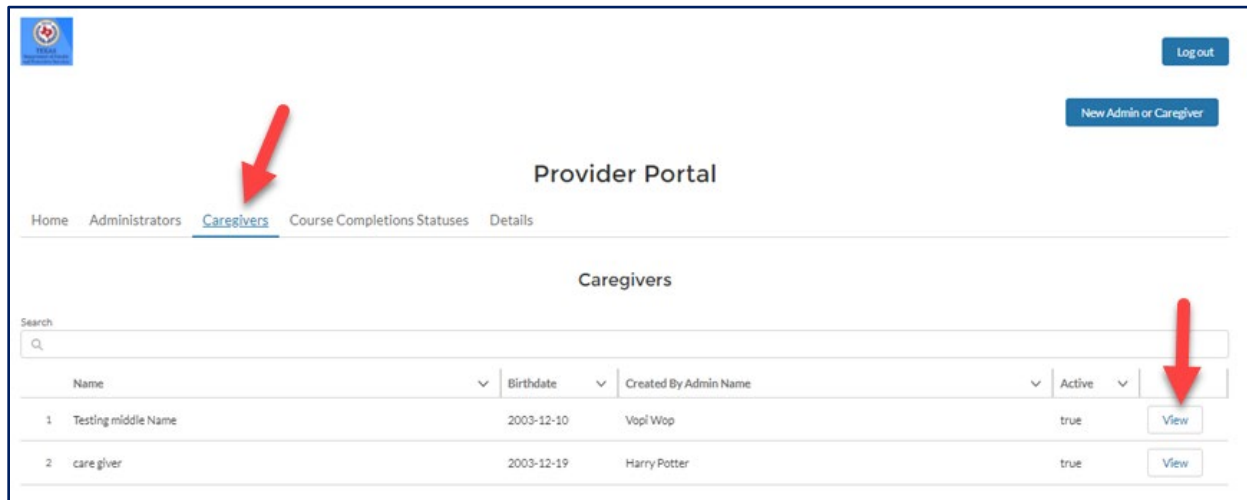

The following are **Caregivers tab** functionalities:

- **Search**: Enter a value to limit the number of profiles displayed.
- **Sort**: Select a row header to sort by that field (ascending or descending). If the list is sorted an arrow, pointing up/ascending or down/descending, will appear next to the header row name.
- **Wrap Text or Clip Text**: Select the down-arrow on the right side of a column heading to select either to Wrap Text or Clip Text.
  - **Wrap Text** allows for the entire data in a field to be viewed.
  - **Clip Text** fits the data to the space allotted; thus, if information is cut off, leader dots will be displayed to indicate more information is available.
- **View**: Select the **View** button to display profile information for a specific caregiver. Selecting the View button will open the selected profile on the **Details** tab.

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How to Update an Existing Caregiver Profile

1. Select the **Caregivers** tab then click the **View** button next to the Caregiver that you want to view or edit. The selected record will open on the **Details** tab.

2. Select the **Edit** button for the **Caregiver Information** section to edit the information as needed.

3. Select **Update** button to save the changes. Select **Cancel** button to close the record without saving the changes.

4. Select the **Edit** button for the **Provider Relation Status** section and edit the information.

   - **Note**: All active GRO caregivers must have an email address entered into the Provider Portal.

5. If the Caregiver leaves the Provider organization, enter the **Date Separated** and the **Caregiver Deactivation Reason**.
   - **Note**: The Active checkbox will automatically be unchecked after the **Date Separated** passes.

6. Select **Update** button to save the changes. Select **Cancel** button to close the record without saving the changes.

How to Resend an Email Notification to GRO Caregiver

GRO Caregivers receives an email when administrators create a profile for the caregiver (Welcome Email) and anytime there is an Attachment A which requires their acknowledgement. In the event the caregiver needs the email sent to them again, the administrator can do so by accessing's the caregiver profile and selecting to Resend Emails.

1. Select the **Caregivers** tab then click the **View** button next to the Caregiver that you want to resend an email notification. The selected record will open on the **Details** tab.

2. Select the **Resend Emails** button for the **Caregiver Information** section to edit the information as needed.

3. Select the dropdown **arrow** to select which type of email (Attachment A or Welcome Email) needs to be redistributed then select the **Next** button.

4. Select the radio button next to document(s) that should be resent then click **Send Email** button.

View Children Tab

The View Children tab is a list of all children associated with a provider account. The View Children tab displays the **PID**, **First Name**, **Last Name**, **Status** and **Document Received Date** fields. Additionally, there is a **Search** button above the list of children. The PID is a hyperlink. When a PID is selected, it will open to a **Children Details** page in a new window.
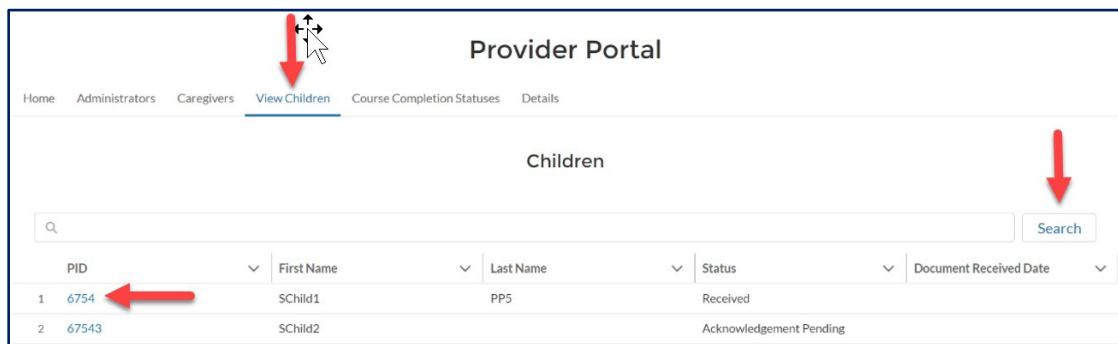
The following are **View Children tab** functionalities:

- **Search**: Enter data to limit the display of children records.
- **PID**: Click on the desired PID to view a child's details.
- **Sort**: Select a row header to sort by that field (ascending or descending). If the list is sorted an arrow, pointing up/ascending or down/descending, will appear next to the header row name.
- **Wrap Text or Clip Text**: Select the down-arrow on the right side of a column heading to select either to Wrap Text or Clip Text.
    - **Wrap Text** allows for the entire data in a field to be viewed.
    - **Clip Text** fits the data to the space allotted; thus, if information is cut off, leader dots will be displayed to indicate more information is available.
- Status field is an indication of the state for an Attachment A form.

Status	Meaning	Action Required
Received	A new document was received.	**Provider** must immediately assign caregivers to child.
Acknowledgment Pending	There is an existing "child-document" record forwarded to a child's assigned caregivers. One or more	All assigned **caregivers** must read
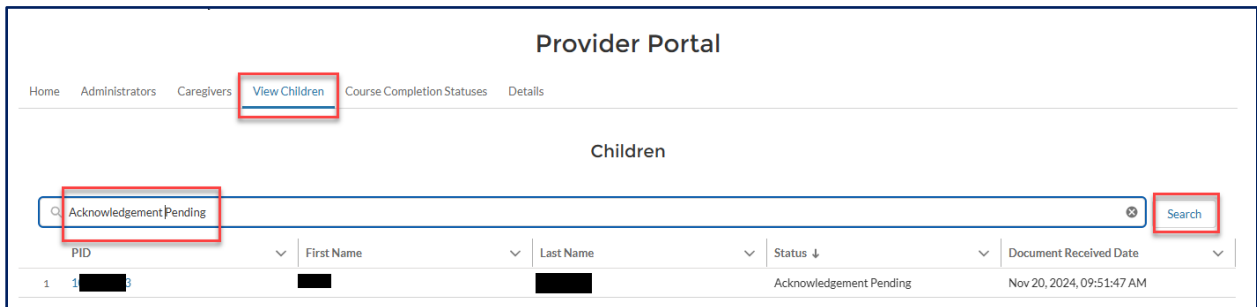
	caregiver(s) has not yet completed the acknowledgement process.	and acknowledge receipt of document.
Acknowledged	All the caregiver(s) assigned to a child have completed acknowledgment.	No further action is required.
Expired	This status will prevent an outdated child document from being assigned or acknowledged. Expired status occurs when a child document has a status of "Received" and a new document for the same child is received, this changes the existing record from "Received" to "Expired".	No action can be taken for on this Attachment A document when status is "Expired".

How to Manage Attachment A Acknowledgements

The primary and secondary administrators for GRO accounts are required to manage and monitor the acknowledgement request process. Follow the steps below to monitor the document acknowledgement status:

In the **Search** box located on the View Children tab, type the word "**Acknowledgment Pending**" then click **Search**. The list displayed will be limited to the desired cases only.
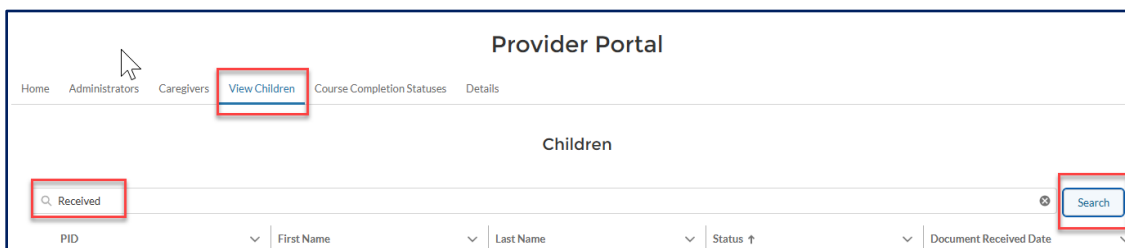

How to Identify Children Needing a Caregiver Assigned

If a provider receives a document from DFPS and a caregiver is not assigned to a child, the status of **Received** will be displayed next to a child's name on the **View Children** tab. To limit the list of children shown on the View Children tab where the provider has received an Attachment A document, but no caregiver is assigned to the child, do the following:

In the **Search** box located on the View Children tab, type the word "**Received**" then click **Search**. The list displayed will be limited to the desired cases only.

A different way to achieve the same result is to sort the list of children shown. Click on the word **Status** in column header on the View Children tab. An arrow will appear next to the word **Status**. An up arrow means the list is

sorted in ascending order. A down arrow means the list is sorted in descending order. Then scroll to view all records with a status of **Received**.

How to Remove an Assigned Caregiver

If a person is no longer a child's caregiver, the Primary or Secondary Administrator can remove this individual from the **Assigned Caregiver Details** list for a child. From the **View Children** tab,

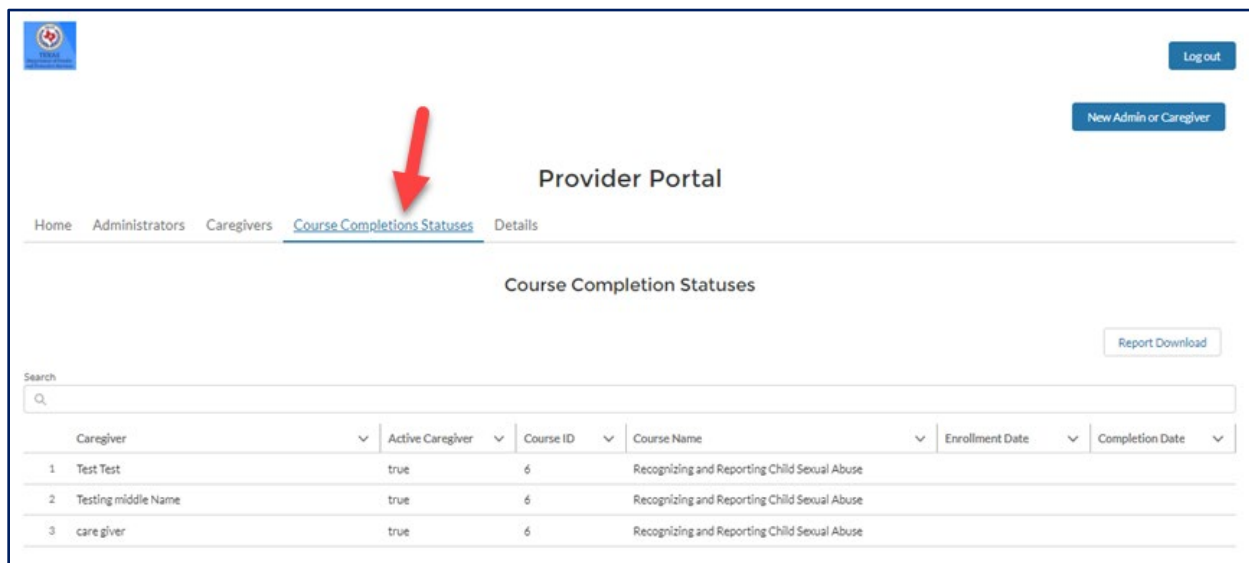1. Select the PID hyperlink for the child whose caregiver will be removed.

2. Identify the caregiver which you wish to remove then click the **Delete** button on the same line as the caregiver's name.

Course Completions Statuses Tab

The Course Completions Statuses tab will display the courses completed by caregivers in your organization. There is a **Report Download** button that allows you to download the **Course Completions Statuses** for all Caregivers under your Provider Organization.
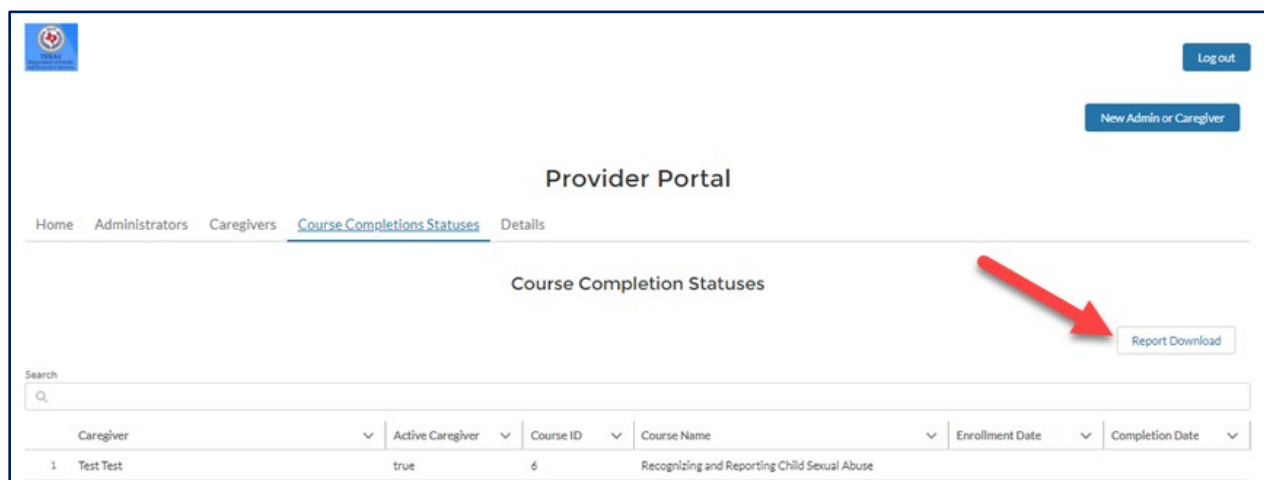
How to Download a Course Completion Statuses Report

Follow the steps below to download a course completion statuses report:

1. In the Course Completion Statuses tab, select the **Report Download** button.

2. The Choose Contact Course window opens. Select one or multiple **courses** for which to download the report by selecting the **checkbox on each course row**. Select the header row checkbox to select or deselect all of the course rows.

3. Select **OK**.

The report downloads as an Excel file. Open the file to access the report information.

Note: After a caregiver completes a course, it might take up to one hour for the course completion information to be displayed in the Provider Portal.

Details Tab

The **Details** tab displays the details associated with last administrator or caregiver profile selected to view. If there is no information displayed on the tab, then the user has never viewed a profile for an administrator or caregiver. Information only populates the **Details** tab when the **View** button on the **Administrators** or **Caregivers** tabs is selected.

- **Note:**
  - The **Email** field is not editable.
  - When a Primary Admin views the Details for a Secondary Admin, the **Activate/Deactivate** and **Promote to Admin** buttons are visible.
  - A provider can only have one primary administrator; thus, if you promote a secondary administrator to a primary administrator, the previous primary administrator will now be a secondary administrator.

Logout

The **Log out** button is always accessible in the upper right-hand corner of the Provider Portal. This button will log you out of the system properly.
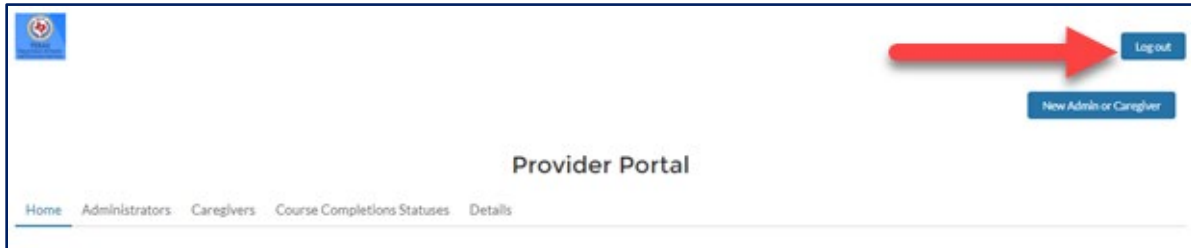
Helpful Tips

1. Effective January 10, 2025, caregivers associated with GRO Providers must electronically acknowledge and certify they have read the Attachment A document in the Provider Portal. A physical Form K908-2279b will continue to be used for children placed in a GRO via a Child Specific Contract and other non-GRO facilities.

2. Effective December 6, 2024, GRO Providers are required to maintain current and unique email addresses for all caregivers. Caregivers are not permitted to share an email account.

3. Effective January 10, 2025, when there is a pending Attachment A awaiting a GRO caregiver's acknowledgement and certification, an email will be sent to the email account provided in the caregiver's profile.

4. If a GRO caregiver has not completed an Attachment A certification process, a reminder email will be sent each day for three consecutive days and a final reminder on the fifth day.

5. Effective February 1, 2024, Providers are no longer allowed to create a Provider account for themselves.

6. As of June 23, 2022, Recognizing and Reporting Child Sexual Abuse has been replaced with Preventing and Recognizing Youth Sexual Abuse. New Caregivers after June 23, 2022, will only have to take Preventing and Recognizing Youth Sexual Abuse.

7. Trauma Informed Care is an optional course.

8. Administering Psychotropic Medication training is only required if the Caregiver states Yes to administering psychotropic medication to youth.

9. The SSN/ITIN and Date of Birth listed in the Provider Portal must match to what is in Caregiver Training Hub for each Caregiver, otherwise when the Caregiver registers in the Training Hub, the authentication/validation will fail when it goes to lookup the Caregiver record created in your Provider Portal account. Between you and the Caregiver, please make sure the data is entered accurately within both systems before contacting the Help Desk.

10. If you need to reset the password, select **Forgot your password?**

11. When entering passwords, if you enter an incorrect password five times, you will be locked out of your account. If you get locked out,

you will not be able to use the **Forgot your password?** link to reset your password. To have your account unlocked:

- **Non-DFPS Staff**: Please contact the DFPS Help Desk at 877-642- 4777, Press *, and then Option 6-Other to reach a Help Desk Representative.
- **DFPS Staff**: Please contact the DFPS Help Desk at 877-642-4777, input your Employee ID, then Option 6-Others to reach a Help Desk Representative.

12. The link in the "Welcome to the Provider Portal" email expires 36 hours from receipt. If do not set up your password within 36 hours from receipt of email, the account will be locked. If locked, you are required to call to the help desk to unlock your account.

Help Desk

- **Non-DFPS Staff:** Please contact the DFPS Help Desk at 877-642-4777, Press *, and then Option 6-Other to reach a Help Desk Representative.
- **DFPS Staff:** Please contact the DFPS Help Desk at 877-642-4777, input your Employee ID, then Option 6-Others to reach a Help Desk Representative.

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Revision History

Version	Date	Name	Description
1.00	12/30/21	DFPS	Initial version
2.00	1/5/22	DFPS	Updated instructions for how Secondary Administrators login. Updated instructions on Unique Provider Identifier.
3.0	6/8/22	DFPS	Removed caregiver training email address. Added help desk contact info, added link expiration verbiage. Added what to do if Provider is unable to add a secondary admin.
4.0	6/17/22	DFPS	Changed how to download a caregiver status report. Added troubleshooting section.
5.0	7/5/22	DFPS	Remediated accessibility issues. Added retrieving user's course completion status and view progress within user's dashboard sections.
6.0	7/26/22	DFPS	Removed retrieving user's course completion statute and view progress within user's dashboard sections.
7.0	2/2/24	DFPS	Total publication reorganization and update.
8.0	1/10/25	DFPS	Modified to job aid include caregiver email address, assigning caregivers to children, and managing online Attachment A certification process.