



Texas Department of  
**Family and Protective Services**

## Provider Portal Job Aid

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7/26/2022

Version 6.00



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## Introduction

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### Purpose

The purpose of this job aid is to describe the steps that will need to be taken by Providers to login and manage their organization's information, administrators, and caregivers in the Provider Portal.

### Scope

The scope of this **Provider Portal Job Aid** is to show Providers how to login to the system and manage the information on the Provider Portal tabs (**Home, Administrators, Caregivers, Course Completions Statuses, and Details**).

### 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, and caseworkers entering on behalf unlicensed kin.



## Registration and Login

### Primary Administrator Registration

The individual whom a Provider designates as their Provider Portal Primary Administrator will first need to access the Registration site, then complete the account setup. After they have completed the account setup, they will be able to proceed to the login site.

Additional Provider Portal administrators are called Secondary Administrators and will follow different steps to login. See the next section of this job aid.

### Registration and Account Setup Steps:

1. Go to the Registration site. For security reasons, please see the URL sent to you via email from "DFPS Residential Contracts".
2. The Registration site displays. Enter your **First Name**, **Last Name**, and **Email**. Then, create and confirm your **Password**.

3. Select **Sign Up**.
  - **Note:** If you already have an account and you are directed to the Sign-Up page, select **Already have an account?** to display the login page.



4. The Provider Admin Registration page displays. Enter the following information into its corresponding fields in the Provider Info section:

The screenshot shows a form titled "Provider Admin Registration" with a section labeled "Provider Info". The fields are as follows:

- \* Provider Name
- \* Provider Main Address Street
- \* Provider Main Address City
- \* Provider Main Address State
- \* Provider Main Address Zip
- \* Provider Main Contact Name
- \* Provider Main Contact Phone
- \* Provider Main Contact Email
- \* Unique Provider Identifier Type (dropdown menu with "--None--" selected)
- \* Unique Provider Identifier (with an information icon)

- Provider Name
- Provider Main Address Street
- Provider Main Address City
- Provider Main Address State
- Provider Main Address Zip
- Provider Main Contact Name
- Provider Main Contact Phone
- Provider Main Contact Email
- **Unique Provider Identifier Type. Choose one of the following types:**
  - **Contract ID:** GRO and CPA Providers (also known as contract number).
  - **IMPACT Resource ID:** SSCC Subcontracts or have no DFPS Residential Contract.
  - **CLASS Operation ID:** Choose if you do not know your Contract ID or IMPACT Resource ID, but know your CLASS Operation ID.
  - **IMPACT Person ID:** Choose if you do not know your Contract ID, IMPACT Resource ID, or CLASS Operation ID, but know your IMPACT Person ID.
- **Unique Provider Identifier Number:**
  - **Contract ID** field has a max length of 16 characters, which can be letters and numbers. Please do not include dashes or any other special characters. Example: HHS123456789123.



- **IMPACT Resource ID** field has a max length of 16 characters, which can be letters and numbers. Please do not include dashes or any other special characters. Example: 87654321.
  - **CLASS Operation ID** field has a max length of 16 characters, which can be letters and numbers. Please do not include dashes or any other special characters. Example: 1234567890.
  - **IMPACT Person ID** field has a max length of 16 characters, which can be letters and numbers. Please do not include dashes or any other special characters. Example: 654321.
5. Enter the following information into its corresponding fields in the **Additional User Info** section:

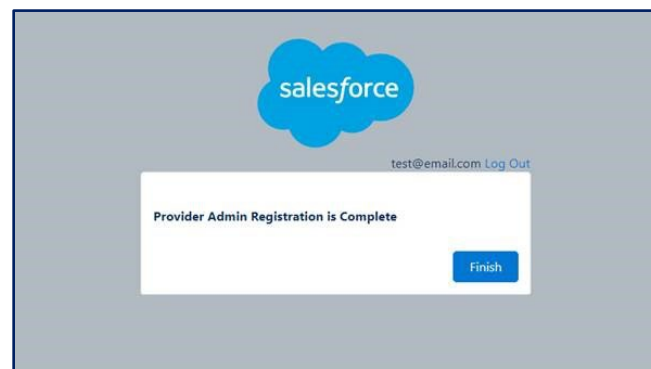
Additional User Info

Phone Number

Provider Training Compliance Point of Contact

Next

- Phone Number (your phone number)
  - Provider Training Compliance Point of Contact (select this box if you are the point of contact for training compliance for you Provider)
6. Select **Next**.
7. You will receive a confirmation message on the screen and a Welcome message via email.



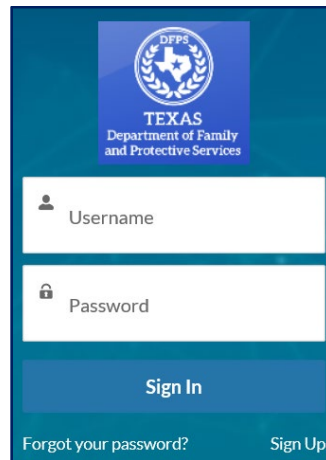


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## Primary Administrator Login

After a Primary Administrator has completed the registration process as described above, they can Sign Into the system using the account information that they specified in the registration process. **Note:** sometimes, depending on timing, it may not make you sign in again but take you directly to the Provider info page.

1. Go to Provider Portal Sign In site (sent to you via email from "DFPS Residential Contracts").
2. The Provider Portal Sign In page will display.



- **Note:** If you get this screen and you do not yet have an account (have not gone through the registration process), select **Sign Up** to display the registration screen depicted above in the Registration section.
  - **Note:** If you need to reset the password, select **Forgot your password?**
  - **Note:** 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.
3. Enter your **Username** (your Username is your email address that you provided during the registration process).



4. Enter your **Password** (the password that you created during the registration process).
5. Select **Log in**.

## Secondary Administrator Login

A Primary Administrator may designate Secondary Administrators to assist with Caregiver entry and maintenance. A later section of this job aid instructs Primary Administrators on how to add Secondary Administrators.

Secondary Administrators use these steps to login to the Provider Portal.

1. The newly created Secondary Administrator receives a "Welcome to the Provider Portal" email welcoming them to the Provider Portal. The email contains a **one-time link** to get them started. This link will expire in 36 hours from receipt. If your password is not set, the account will be locked, which will require a call to the help desk to unlock your account.
2. Copy the link in the email and paste the link into a Microsoft Edge, Google Chrome, Firefox, or Safari browser. Internet Explorer is not recommended.
3. You will be prompted to change your password. Enter the **New Password** and **Confirm New Password**.

4. Select **Change Password**. You will then be taken to the Provider Portal.





5. If you are not automatically redirected to the Provider Portal, go to your “Welcome to the Provider Portal” email and use the main Provider Portal link to login.
  - **Note:** This is a handy link to bookmark in the browser of your choice.

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## Provider Portal

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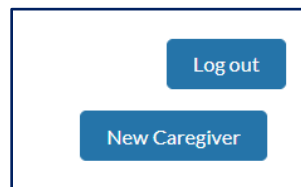
### Overview

From the Provider Portal, providers can manage their administrator and caregiver information, and see caregiver training status.

When you sign into the Provider Portal application, you will be taken to the **Home** tab.

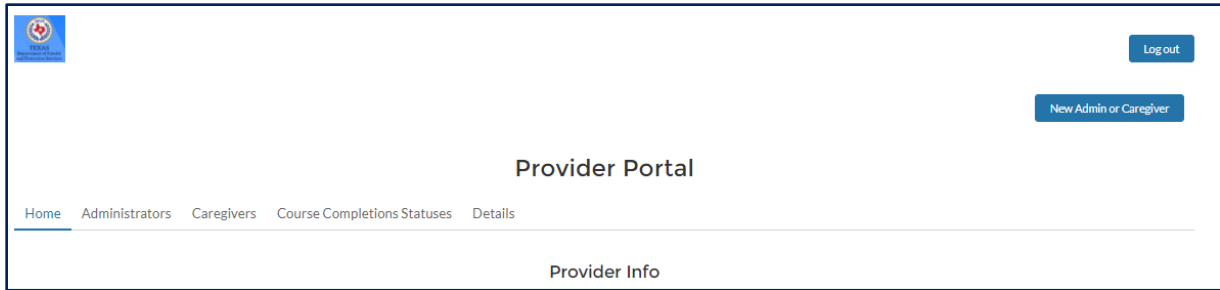
### Tabs and Buttons available in the Provider Portal

1. **Log out** button. This button will log you out of the system.
2. **New Admin or Caregiver** button. This button will start the process for creating a new administrator or a caregiver.
  - **Note:** You will see the **New Admin or Caregiver** button if you are logged in as a primary administrator. Only primary administrators can create additional administrators. If you are logged in as a secondary administrator, you will see the **New Caregiver** button instead of the **New Admin or Caregiver** button.





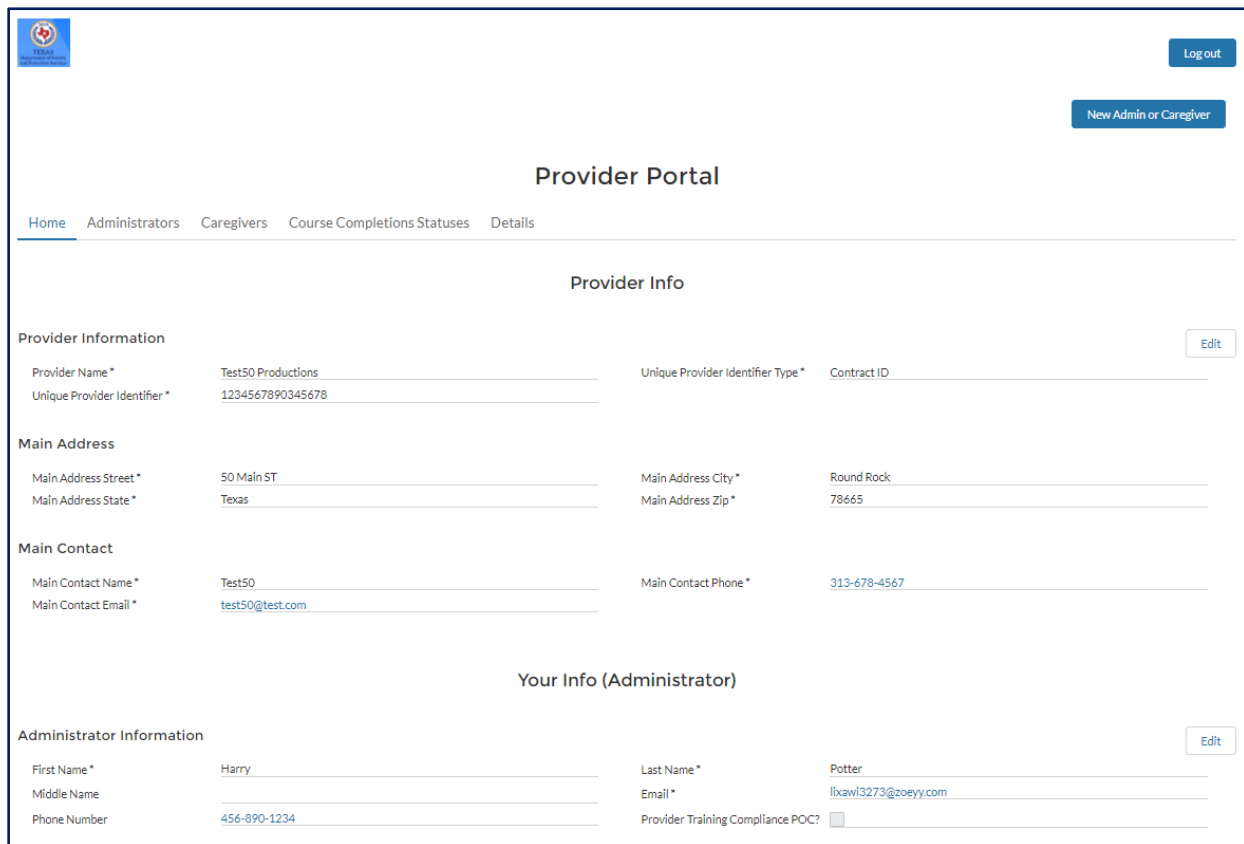
- **Note:** The process to create a new administrator or create a new caregiver will be covered in an upcoming section.



- The next sections will discuss each of the tabs and associated functionality in more detail.

## Home Tab

When you login to the Provider Portal, you will be taken to the **Home** tab. From the **Home** tab, you can view and edit the **Provider Info** and **Your Info (Administrator)**.





## Steps to Edit Provider Info or Your Info (Administrator)

1. Select the **Edit** button on the right side of the section. The screen will open in a view that allows you to edit the applicable fields.
  - **Note:** You must be the Primary Administrator to edit the **Provider Info** section.
2. Edit the field values as needed, then select **Update**.
  - **Note:** Select **Cancel** to cancel the edit and discard any changes.

**Provider Portal**

Home Administrators Caregivers Course Completions Statuses Details

**Provider Info**

**Provider Information**

Provider Name \*  Unique Provider Identifier Type \*

Unique Provider Identifier \*

**Main Address**

Main Address Street \*  Main Address City \*

Main Address State \*  Main Address Zip \*

**Main Contact**

Main Contact Name \*  Main Contact Phone \*

Main Contact Email \*

**Figure 1: Edit Provider Info Section**

**Your Info (Administrator)**

**Administrator Information**

First Name \*  Last Name \*

Middle Name

Phone Number  Email \*

Provider Training Compliance POC?

**Figure 2: Your Info (Administrator) Editing Page**

- **Note:** The **Email** field is not editable, since that is your Username.
- **Note:** When entering or editing field values, the required fields are marked with an asterisk (\*).
- **Note:** Some fields have an **Information** icon next to the field (such as next to the **Unique Provider Identifier Type** field). Select the **Information** icon to display helpful information about that field.



## Administrators Tab

From the **Administrators** tab, you can manage provider administrators. A **primary administrator** can enter organizational provider information and can add secondary administrators. A provider can have only one primary administrator and multiple secondary administrators. Both primary and secondary administrators can manage caregivers.

The **Administrators** tab is present for both an Administrator and two Secondary Admins. The Administrator tab displays the **Role, Name, Email, Provider Training Compliance POC**, and **Active** fields. Additionally, there is a **View** button next to each row. Select the **View** button to view and the information for each administrator.

The screenshot shows the 'Provider Portal' interface. At the top right, there are 'Log out' and 'New Admin or Caregiver' buttons. The main navigation bar includes 'Home', 'Administrators' (which is highlighted), 'Caregivers', 'Course Completions', 'Statuses', and 'Details'. Below the navigation is a search bar and a table titled 'Administrators'. The table has the following columns: Role, Name, Email, Provider Training Compliance POC, and Active. There are three rows of data, each with a 'View' button to its right.

	Role	Name	Email	Provider Training Compliance POC	Active	
1	Secondary Admin	Lesley Lewis	lexewly282@oxyxi.com	true	true	<a href="#">View</a>
2	Administrator	Harry Potter	lixaw3273@zoeyy.com	false	true	<a href="#">View</a>
3	Secondary Admin	Vopi Wop	voplwop142@ehstock.com	true	true	<a href="#">View</a>

Following are some basic **Administrator** tab functionalities (**Note:** the same will apply to other tabs as well):

- **Search.** Enter a search value to narrow down the amount of information displayed.
- **Sort.** Select a row header to sort by that field (ascending or descending).
- **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**.



## Steps to View and Edit Administrator Details

1. Select the **View** button next to a row.

Provider Portal

Home [Administrators](#) Caregivers Course Completions Statuses Details

Administrators

Search

	Role	Name	Email	Provider Training Compliance POC	Active	
1	Secondary Admin	Lesley Lewis	lexewiy282@oxyxl.com	true	true	<a href="#">View</a>
2	Administrator	Harry Potter	lxawi3273@zoeyy.com	false	true	<a href="#">View</a>
3	Secondary Admin	Vopi Wop	vopiwop142@ehstock.com	true	true	<a href="#">View</a>

2. Select the **Details** tab to access the selected **Administrator Details**, and select **Edit** to open the **Administrator Details** edit screen.

Provider Portal

Home Administrators Caregivers Course Completions Statuses [Details](#)

Administrator Details

Administrator Information

First Name\* Harry  
Middle Name  
Phone Number 456-890-1234

Last Name\* Potter  
Email\* lxawi3273@zoeyy.com  
Provider Training Compliance POC?

Provider Relation Status

Active

[Edit](#)



3. The **Administrator Details** edit screen displays.

Provider Portal

Home Administrators Caregivers Course Completions Statuses Details

Administrator Details

Administrator Information

First Name\* Harry Last Name\* Potter

Middle Name Email\* lixawi3273@zoeyy.com

Phone Number 456-890-1234 Provider Training Compliance POC?

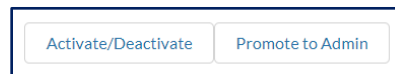
Cancel Update

Provider Relation Status

Active

4. Edit field values as necessary, then select **Update**.

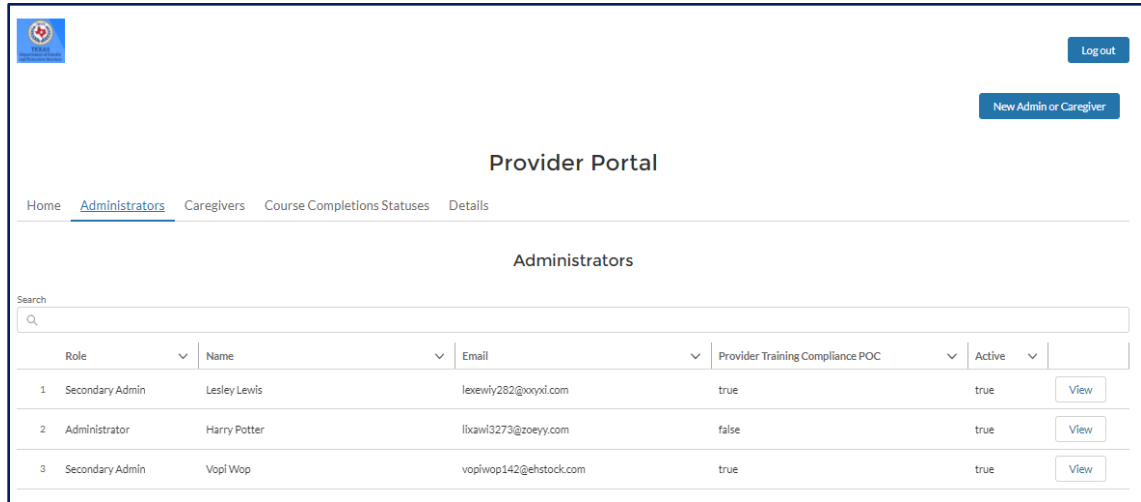
- **Note:** The **Email** field is not editable because it is the Administrator's Username.
- **Note:** When a Primary Admin views a Secondary Admin, they will be able to access the **Activate/Deactivate** and **Promote to Admin** buttons. A provider can only have one primary administrator; thus, if you promote a secondary administrator to a primary administrator, the previous primary administrator will now be a secondary administrator.



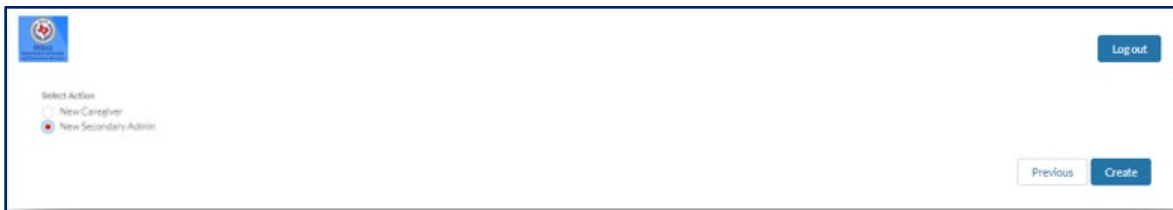


## Steps to Add a Secondary Administrator

1. Select the **Administrators** tab to view the current administrators.
  - **Note:** Only Primary Administrators can add Secondary Administrators. Both Primary and Secondary Administrators can add Caregivers.



2. Select the **New Admin** or **Caregiver** button.
  - **Note:** You can select the **New Admin or Caregiver** button from any window, but you will typically click on the **Administrators** tab to view the current administrators first.
3. Select **New Secondary Admin**, then select **Create**.





4. Enter the Secondary Admin Information, then select **Next**.

- **Note:** If you receive the error “Your request cannot be processed at this time. The site administrator has been alerted”, this indicates the email is already in use by another 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.

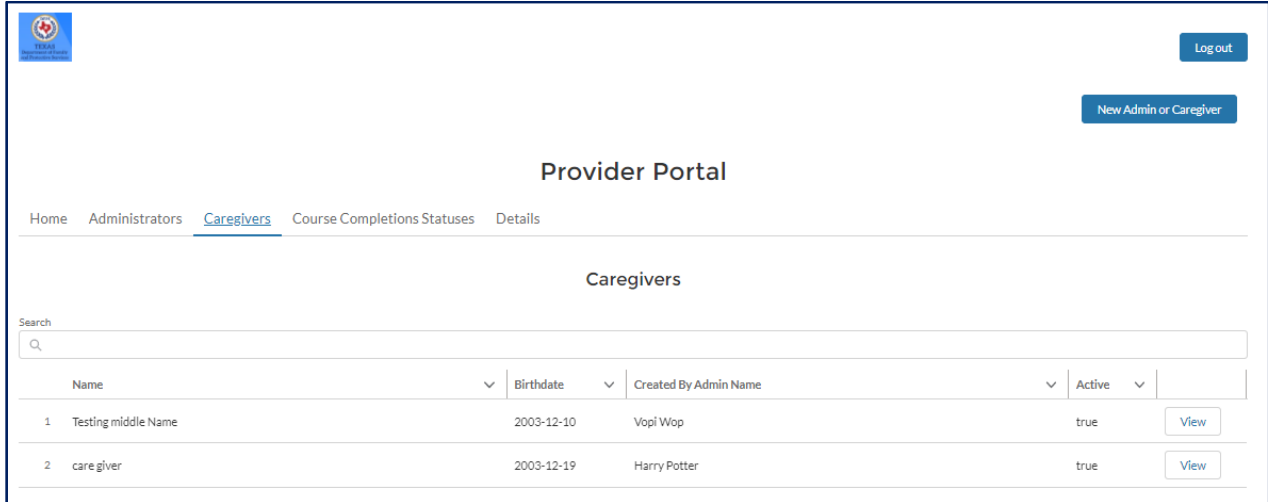
5. A message will display stating “The Secondary Admin was successfully created...”. Select **Finish**.

6. After you select **Finish**, the newly created Secondary Administrator will receive an email with further instructions. See Section 2.2 for Secondary Administrator login instructions.



## Caregivers Tab

The image below depicts the **Caregivers** tab. Select the **View** button to access and edit caregiver information.



Provider Portal

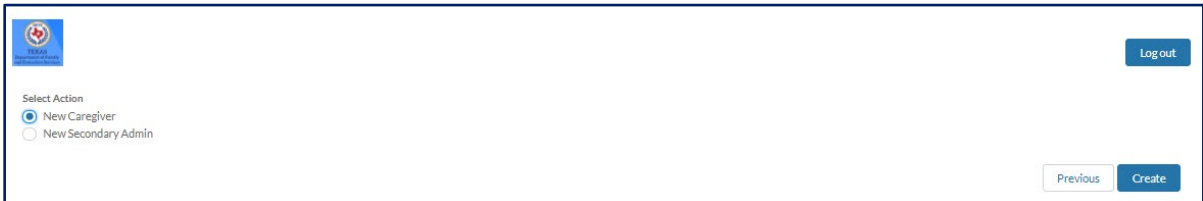
Home Administrators Caregivers Course Completions Statuses Details

Search

Name	Birthdate	Created By Admin Name	Active	
1 Testing middle Name	2003-12-10	Vopi Wop	true	<a href="#">View</a>
2 care giver	2003-12-19	Harry Potter	true	<a href="#">View</a>

## Steps to Add a New Caregiver

1. Select the **New Admin** or **Caregiver** button.
2. Select **New Caregiver**, then select **Create**.

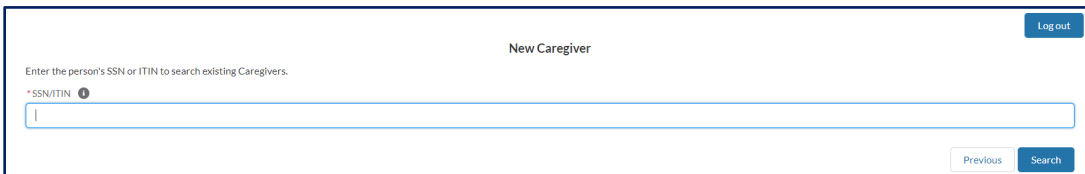


Select Action

New Caregiver  
 New Secondary Admin

[Previous](#) [Create](#)

3. Enter the **SSN/ITIN (Social Security Number/Individual Taxpayer Identification Number)**, then select **Search** to search existing Caregivers.



New Caregiver

Enter the person's SSN or ITIN to search existing Caregivers.

\*SSN/ITIN ⓘ

[Previous](#) [Search](#)

- **Note:** Enter the **SSN** using XXX-XX-XXXX format (with the dashes included).



- If the SSN/ITIN already exists within the system, the Caregiver Info will display. Enter the **Date Started as Caregiver** at your Provider organization.

The screenshot shows a web form titled "New Caregiver". At the top right is a "Logout" button. Below the title, a message states: "An existing Caregiver was found. Please verify their details and make updates as necessary." The form is divided into two sections: "Caregiver Info" and "Caregiver Provider Information".

**Caregiver Info**

SSN/ITIN:  
111-11-1111

Legal First Name:  
Ronald

Legal Last Name:  
McDonald

Legal Middle Name:  
M

Birthdate:  
September 18, 1991

**Caregiver Provider Information**

\* Date Started as Caregiver

[Red outlined input field]

Complete this field.

At the bottom right are "Previous" and "Add to Provider" buttons.

- **Starting 1/1/2022 and after**, when entering new Caregivers, use the prospective date the Caregiver will begin caring for child(ren) as the **Date Started as Caregiver**.
- **Note:** In order to show 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 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.

- Select **Add to Provider**.



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

7. To create a new Caregiver, select **Create a new Caregiver**, then select **Next**.

8. Enter the **Legal First Name**, **Legal Last Name**, **Legal Middle Name**, **Birthdate**, and **Date Started as Caregiver** at your Provider organization.

- **Starting 1/1/2022 and after**, when entering new Caregivers, use the prospective date the Caregiver will begin caring for child(ren) as the **Date Started as Caregiver**.
- **Note:** In order to show 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 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.

9. Select **Add to Provider**.

10. A message will display stating that the individual must take the training course. Select **Proceed**.

New Caregiver

Note

The individual must take Recognizing and Reporting Sexual Abuse, Including Child-On-Child Sexual Abuse training prior to starting as a Caregiver who provides direct care to a child/youth in care. If the individual has previously taken the training, the Caregiver must retake the training in the Training Hub by the annual due date or by February 1, 2022, whichever is sooner.

Previous Proceed

11. The message will display stating that the Caregiver was successfully added to the current Provider. Select **Finish**.

New Caregiver

Caregiver was successfully added to the current Provider.

Finish

- **Note:** After a caregiver has been added to the Provider organization, the Provider may inform the Caregiver that they can complete the required training course in the Training Hub.



## Steps to View and Edit Caregiver Details

1. Select the **View** button next to the Caregiver that you want to view or edit.

Provider Portal

Home Administrators **Caregivers** Course Completions Statuses Details

Caregivers

Search

Name	Birthdate	Created By Admin Name	Active	
1 Testing middle Name	2003-12-10	Vopl Wop	true	<a href="#">View</a>
2 care giver	2003-12-19	Harry Potter	true	<a href="#">View</a>

2. Select the **Details** tab to access the selected **Caregiver Details**. There is an **Edit** button to edit the **Caregiver Information** and an **Edit** button to edit the **Provider Relation Status**.

Provider Portal

Home Administrators Caregivers Course Completions Statuses **Details**

Caregiver Details

Caregiver Information [Edit](#)

Legal First Name \* Testing  
 Legal Middle Name middle  
 SSN/ITIN \* XXXXXXX4567  
 Legal Last Name \* Name  
 Birthdate \* 12/10/2003

Provider Relation Status [Edit](#)

Active   
 Date Separated  
 Date Started as Caregiver \* 1/4/2022

Caregiver Course Completions

Course ID	Course Name	Course Enrollment Date	Course Completion Date
-----------	-------------	------------------------	------------------------



3. Select the **Edit** button for the **Caregiver Information** section to edit the information as needed, then select **Update**.

Caregiver Details

Caregiver Information

Legal First Name \* Testing      Legal Last Name \* Name

Legal Middle Name middle      Birthdate \* Dec 10, 2003

SSN/ITIN \* XXXXXXXX4567

Cancel Update

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

Caregiver Details

Caregiver Information Edit

Legal First Name \* Testing      Legal Last Name \* Name

Legal Middle Name middle      Birthdate \* 12/10/2003

SSN/ITIN \* XXXXXXXX4567

Provider Relation Status

Active       Date Started as Caregiver \* Jan 4, 2022

Date Separated

Cancel Update

5. If the Caregiver leaves the Provider organization, enter the separation date in **Date Separated**.
  - **Note:** The Active checkbox will become unchecked once the **Date Separated** passes.
6. Select **Update**.



## Course Completions Statuses Tab

1. Select the **Course Completions Statuses** tab within your Provider’s Organization account.
2. In the search field, search for the Caregiver in question to access their enrollment and course completion information.
3. You can also select **Report Download** to download the **Course Completions Statuses** for all Caregivers under your Provider Organization.

The screenshot displays the 'Provider Portal' interface for 'Course Completion Statuses'. At the top right, there are 'Log out' and 'New Admin or Caregiver' buttons. A navigation bar includes 'Home', 'Administrators', 'Caregivers', 'Course Completions Statuses' (highlighted), and 'Details'. Below the navigation is a 'Report Download' button and a search bar. The main content is a table with the following data:

	Caregiver	Active Caregiver	Course ID	Course Name	Enrollment Date	Completion Date
1	Test Test	true	6	Recognizing and Reporting Child Sexual Abuse		
2	Testing middle Name	true	6	Recognizing and Reporting Child Sexual Abuse		
3	care giver	true	6	Recognizing and Reporting Child Sexual Abuse		

- **Note:** After a Caregiver completes a course, it can take up to one hour for the completion to be displayed in the Provider Portal.



## Details Tab

The **Details** tab displays Administrator or Caregiver Details information as explained in previous sections of this Job Aid. Select **View** from the **Administrators** or **Caregivers** tabs to access the details in the **Details** tab.

**Provider Portal**

Home Administrators Caregivers Course Completions Statuses Details

### Caregiver Details

**Caregiver Information** Edit

Legal First Name *	Testing	Legal Last Name *	Name
Legal Middle Name	middle	Birthdate *	12/10/2003
SSN/ITIN *	XXXXXXXX4567		

**Provider Relation Status** Edit

Active	<input checked="" type="checkbox"/>	Date Started as Caregiver *	1/4/2022
Date Separated			

**Caregiver Course Completions**

Course ID	Course Name	Course Enrollment Date	Course Completion Date
▼		▼	▼





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## Helpful Tips

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1. After a Caregiver completes a course, it can take up to one hour for the completion to be displayed in the Provider Portal.
2. As of 6/23/22 Recognizing and Reporting Child Sexual Abuse has been replaced with Preventing and Recognizing Youth Sexual Abuse. New Caregivers after 6/23/22 will only have to take Preventing and Recognizing Youth Sexual Abuse.
3. Trauma Informed Care is an optional course.
4. Administering Psychotropic Medication is only required if the Caregiver states Yes to administering psychotropic medication to youth.
5. The SSN/ITIN and Date of Birth must match between the Provider Portal and 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 you've 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.

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## Help Desk

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- **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

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<b>Version</b>	<b>Date</b>	<b>Name</b>	<b>Description</b>
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.