T3C Credentialing Platform Provider Job Aid

Contents

Introduction

The T3C Credential Platform is the online SharePoint-based platform that will be used initially to allow providers to submit their Credential application and supporting documents all together for review and feedback from DFPS Credentialing staff and YFT staff.

The first time a provider goes to use the T3C Credential Platform, you will need to start by registering. The provider will need to identify a single primary email address that will serve as their log-on name, as well as a single individual to serve as the primary point of contact for T3C Credentialing and utilizing the Platform, who needs consistent access to that email. The provider will also need to identify an alternate back-up contact, for all T3C Credentialing communication. Some relevant information regarding the email and contacts:

- The provider can utilize an individual's email address, or a group mailbox address that multiple staff can access.
- The provider can utilize either a company-based email address or an email address from a common email service, like gmail. However either way, you may need to have access to a cell phone on which you can download the Microsoft Authenticator app, which the Platform will send a code number, and you will need to enter that authentication code to gain access. This means that for group email address boxes, one of the individuals with access may need to have the Microsoft Authenticator app on their cell phone, and any staff sharing access to the Platform will need to communicate with that individual to get their code to log in. If you use a common email service, the

Platform will send a verification email with an authentication code that you need to enter any time you try to gain access.

- Each HHSC licensed entity **has to have** a separate, distinct email address. Providers holding multiple licenses (such as a GRO and a CPA, or two+ GROs) *can* have the same alternate contact email, but the primary contact email *must* be different for each license.

Web Address to Self-Register a licensed entity:

https://t3ccredentialreg.dfps.texas.gov

The primary contact will be the only individual that needs to utilize the above link, and will only use it the first time, when they initially register for the Platform.

Web Address for Subsequent Use:

https://dfpstx.sharepoint.com/sites/T3CCS/T3C%20Applications/Forms/My%20Docs.aspx

Self-Registering Process

Before the primary contact begins the registration process, it is *highly recommended that you **log out*** of all email systems except for the one that you will be using as your primary email for communication related to T3C Credentialing.

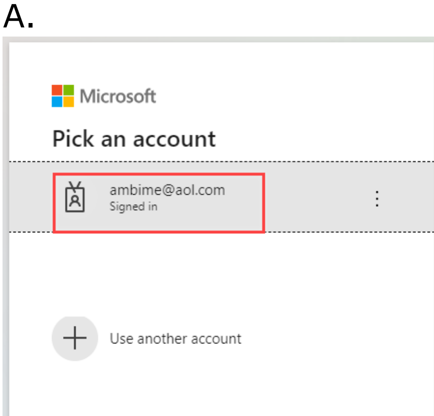
Go to this web address:

https://t3ccredentialreg.dfps.texas.gov

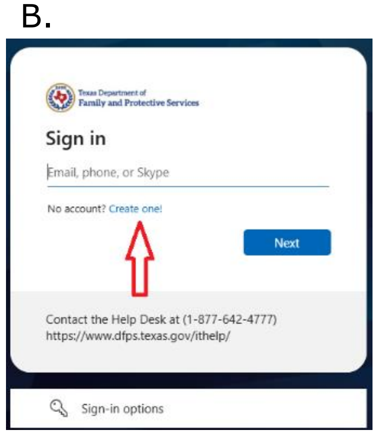
Step 1) The provider will see one of these three pop-up screens, depending on the type of email address that you are using and whether you are signed in at the time of navigating to the hyperlink.

For Form A below, select the correct email to be attached to the Primary Contact.
For Form B below, click the blue hyperlink that says "Create one!"
For Form C below, enter the Primary Contact email, then click "Next".

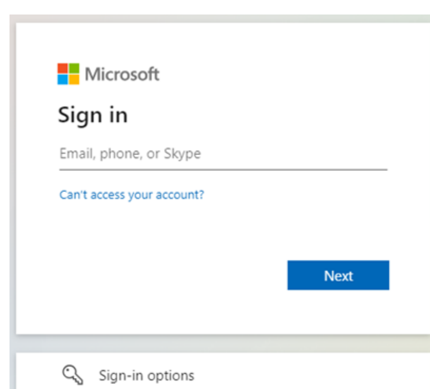
A.



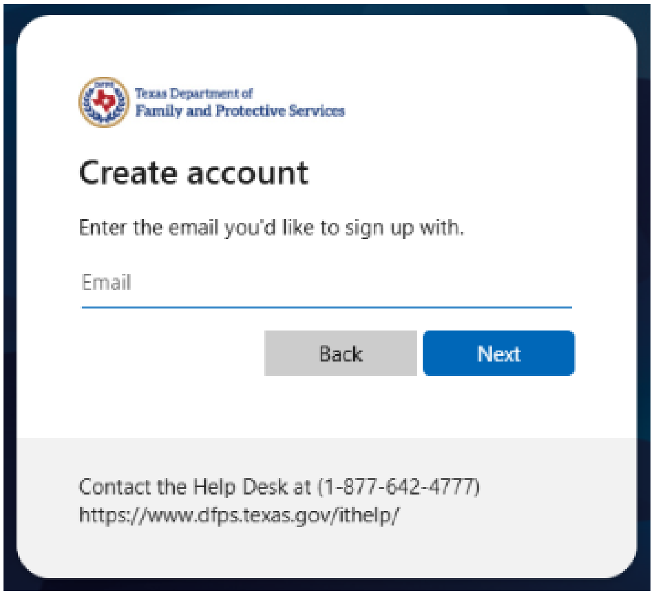
B.



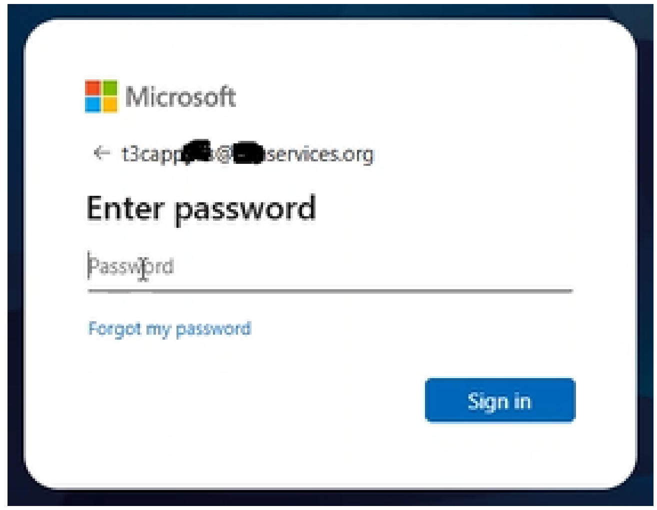
C.



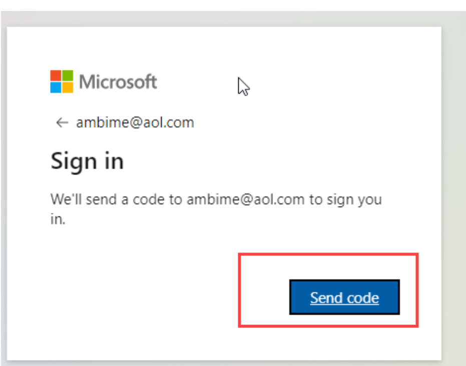
If you are presented with option B, you will be taken to a subsequent pop-up screen that prompts you to enter the email to be attached to the Primary Contact. Be sure to enter the email address correctly before clicking “Next”.



If you are presented with option C, you will be taken to a subsequent pop-up screen that prompts you to enter your internal network password to access the Primary Email Address. Be sure to double check your email address before clicking “Sign In”.

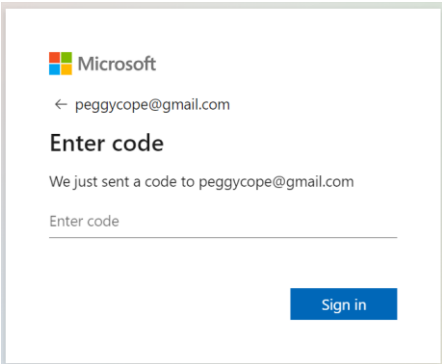


Step 2) Click the “Send code” button on the popup screen to have a unique code sent to the primary email account that you selected or entered:

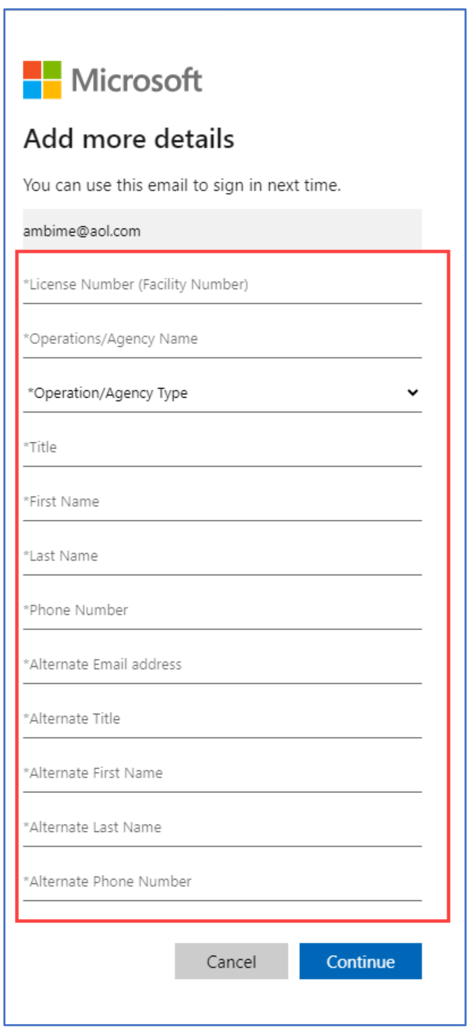


Be sure to check your spam folder in case you don’t see the code email in your inbox. The subject line will be “Your DFPS account verification code”.

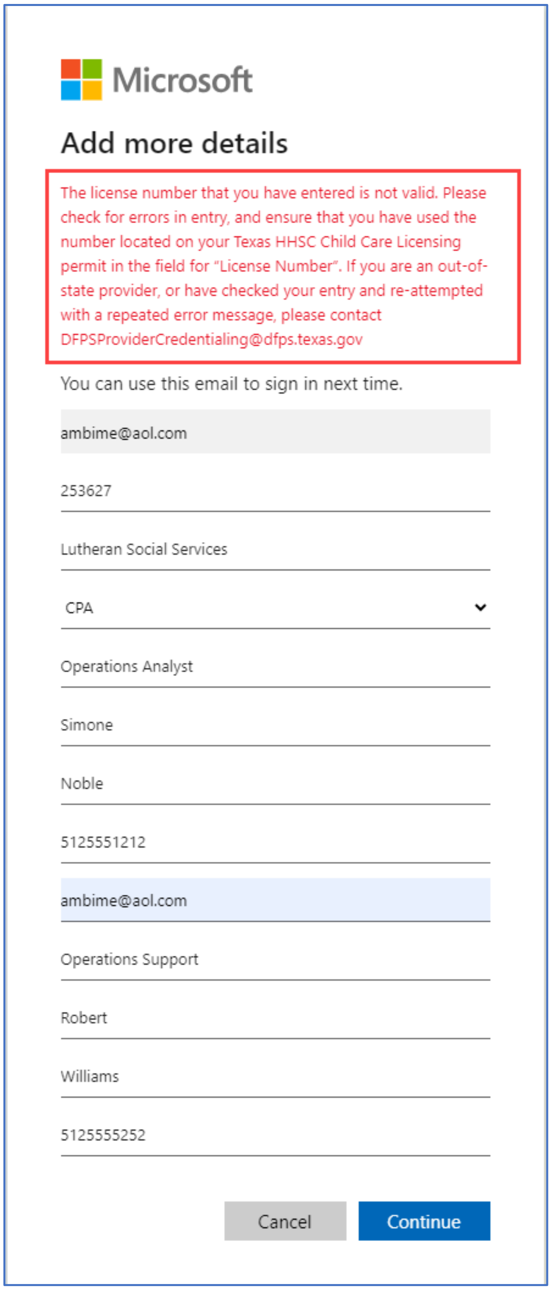
Step 3) Retrieve the unique code from the primary email and enter it in the popup screen. You must complete this step within 10 minutes of generating the code.



Step 4) You will be taken to the Self-Registration page, where you will need to complete every field on the page. **<u>Double check that you have entered all data correctly</u>** – if you click the "Continue" button with incorrect information displayed, you will need to contact the DFPS Help Desk to have the information corrected.



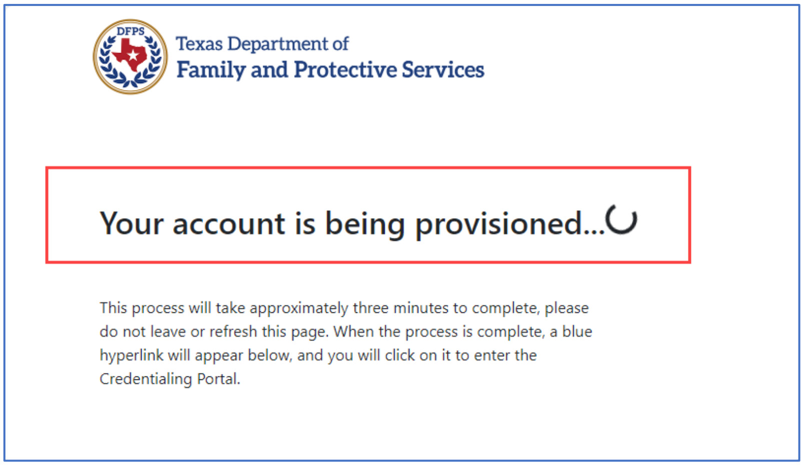
There will be an error message that displays when the "Continue" button is clicked if the provider does not enter a valid License number:



Similar error messages to the one pictured on the left will be generated if the provider enters:

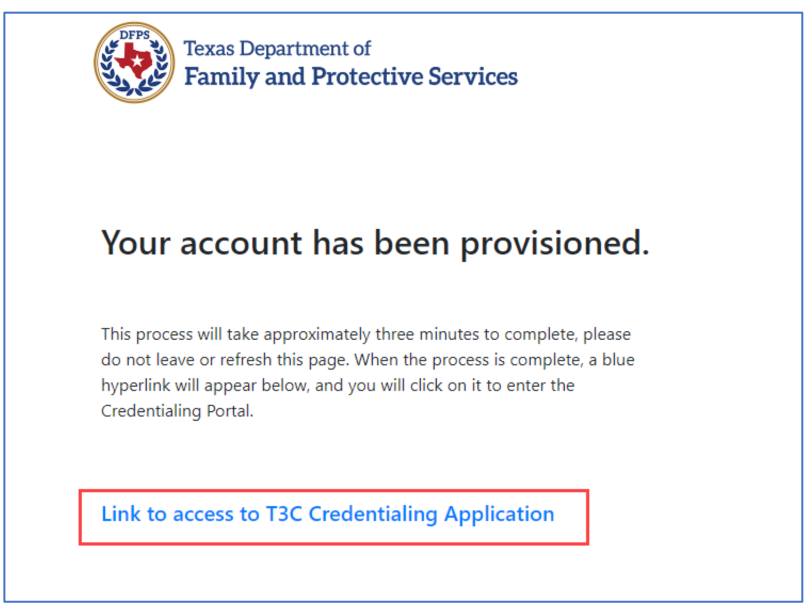
- A duplicate primary contact name or phone number
- A duplicate license number (you can only register once)

Step 5) After you have double checked your data entries and clicked the "Continue" button, you will see the following screen while your account is being set up:



Please be patient while the system validates the information that you have entered – **do not exit or refresh the page** while it is processing.

When the process is complete, the screen will change to include the hyperlink to the Credentialing Platform:



If the screen *does not* change to include the hyperlink within 5 minutes of clicking the "Continue" button on the Self-Registration page, please reach out to the DFPSProviderCredentialing@dfps.texas.gov and include the following information:

- Primary Contact Name
- Phone Number
- Email Address used to attempt self-registry
- HHSC License number
- Description of Issue or Error Message language

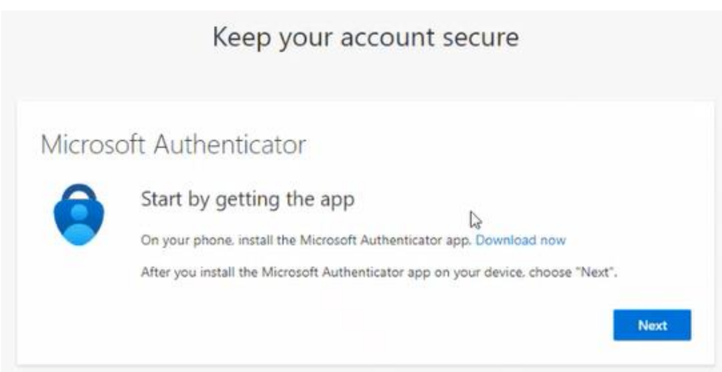
You have now completed the Self-Registration process.

All subsequent log-ons to the Platform can be achieved by clicking on:

https://dfpstx.sharepoint.com/sites/T3CCS/T3C%20Applications/Forms/My%20Docs.aspx
You should not attempt to register again.

Establishing Multi-Factor Authentication (MFA)

There may be some instances where the current configuration of the Platform will prompt the Provider to establish Multi-Factor Authentication (MFA) following a successful provisioning process, to "Keep your account secure" via the Microsoft Authenticator app, with a pop-up similar to this.

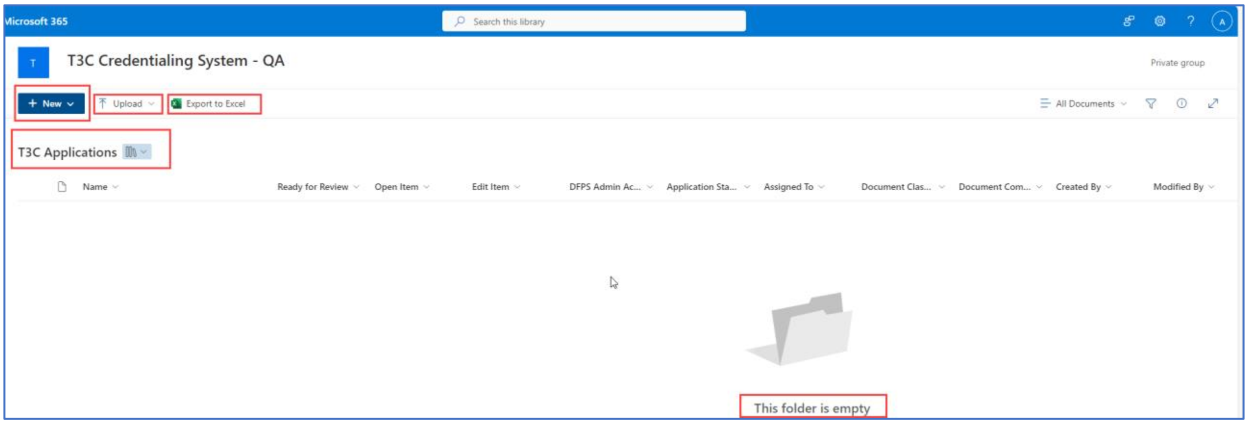


Clicking on the "Download now" hyperlink, a new browser tab opens to walk the Provider through a series of screens to complete the process of downloading the app on your cell phone. Once that is complete, the Provider would close the second browser window and return to this page to click "Next" and go through the process of connecting the App to the Platform, or it will result in only temporary access to the Platform.

In a future configuration of the Platform, this action may be more widely required, and more in-depth instructions would be provided when those updates are rolled out.

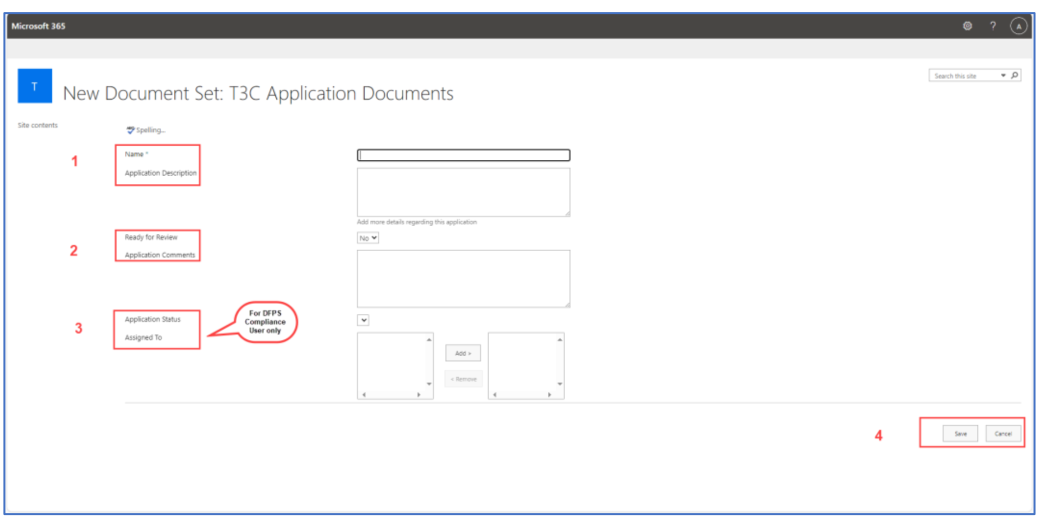
Setting Up The Application Folder

Step 1) Upon logging into the Credentialing Platform, this is the initial page that the provider will see the first time before taking any action. Click the blue 'New' button near the top left corner of the page, and select "T3C Application Document" from the dropdown. This is the *only* time that you will use the 'New' button, unless you submit a subsequent application for additional Service Packages or Add-On Services later on.



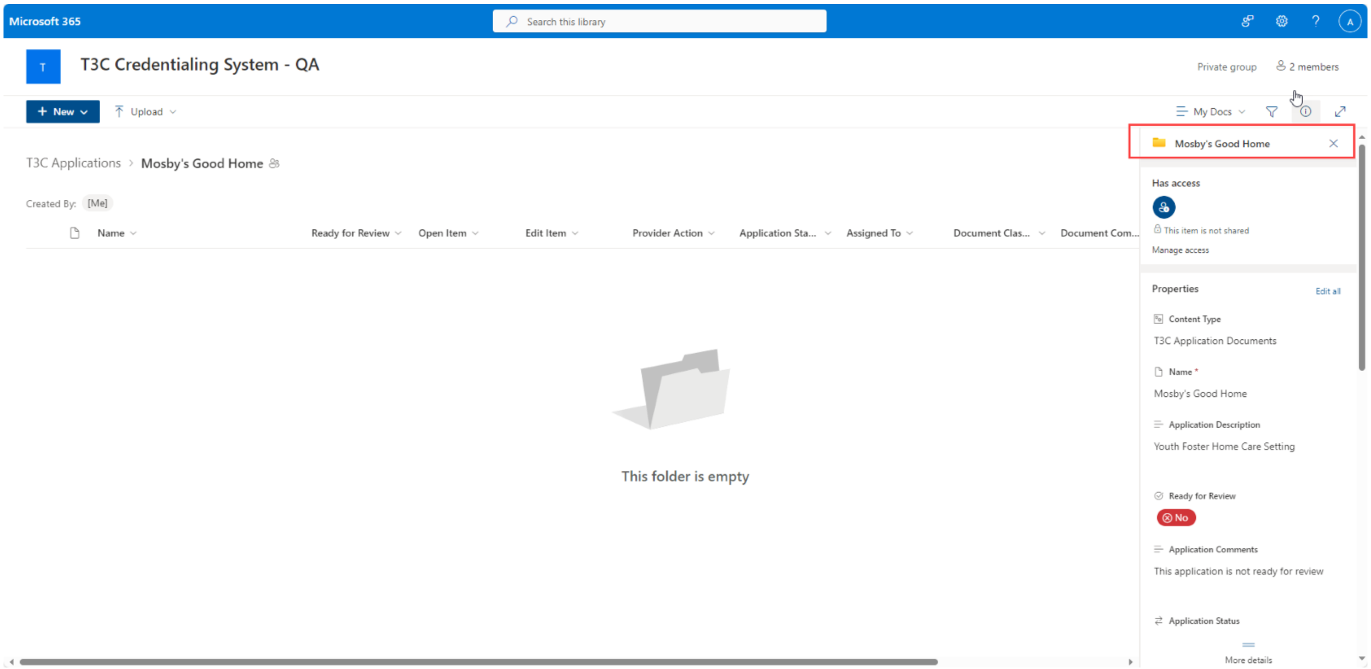
Step 2) Name your 'New Document Set' (essentially creating a new folder), by entering the name of the licensed entity in the "Name" field (1 below). Then click the "Save" button at the bottom right on the screen (4 below):

Note for providers holding multiple licenses, be sure to enter the name of each licensed entity in a way that will distinguish them from each other.

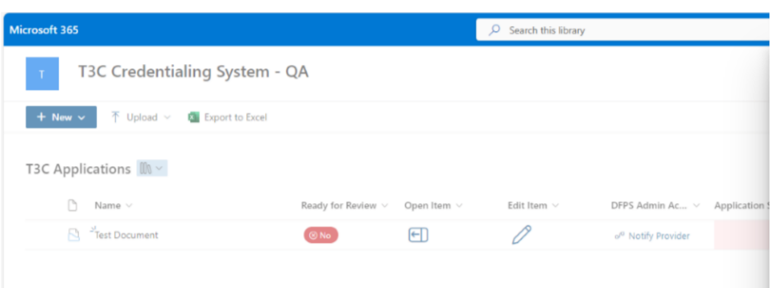


You can enter a description in the "Application Description" field, but it is not required. You should not try to change the "Ready for Review" drop-down.

After clicking the "Save" button, you will see your empty folder, and may or may not see an informational sidebar on the right side of the screen (with your folder name where the red box below is). You can click the "X" in the top right corner of the informational sidebar to remove it.



After you generate your Application folder, when you subsequently log into the platform, you will first arrive to the Application-view level, where you are viewing your "Document Set" (your application folder). The are two ways to navigate into your "Document Set" folder to start uploading documents. You can either click on the name of your folder under the 'Name' column to enter it, or you can click on the icon of opening an envelope under the 'Open Item' column.



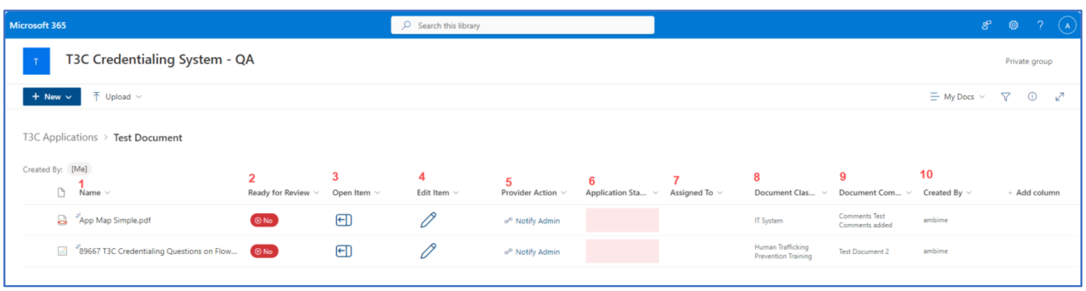
Any time that you log out and then return to the Platform later, be sure to navigate down into your Document Set, from the Application-view level down to the Document-view level, prior to uploading any documents. You may need to change your view (see the Navigating the Uploaded Documents section of this document).

Uploading A Document

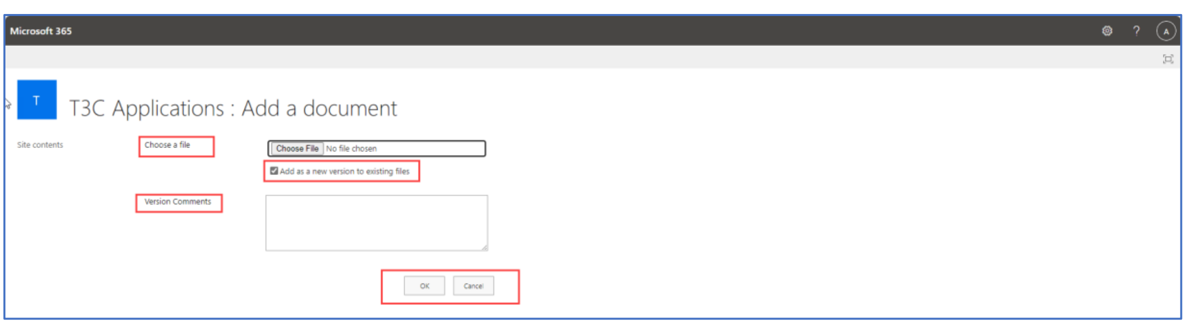
The Provider will be able to upload files up to 2 gigabytes in the following file types: Adobe portable document format (.pdf), Microsoft office documents (such as .doc; .docx; .xls; or .ppt), and images (such as .bmp; .gif; .jpg; .jpeg; .png; and .tif). Files created in other operating systems besides Microsoft and not saved as .pdf *will not* be able to be reviewed. File names should be no more than 50 characters total in length.

Step 1) To make sure that you are inside your folder (aka Document Set) when you upload your documents, look at the label near the top left corner of the page beneath the blue "New" button. In the below example screenshot, the label is "T3C Applications > Test Document". Your current location is what is to the right of the ">", so this example shows the document contents of the 'Test Document' folder that was created in the prior step.

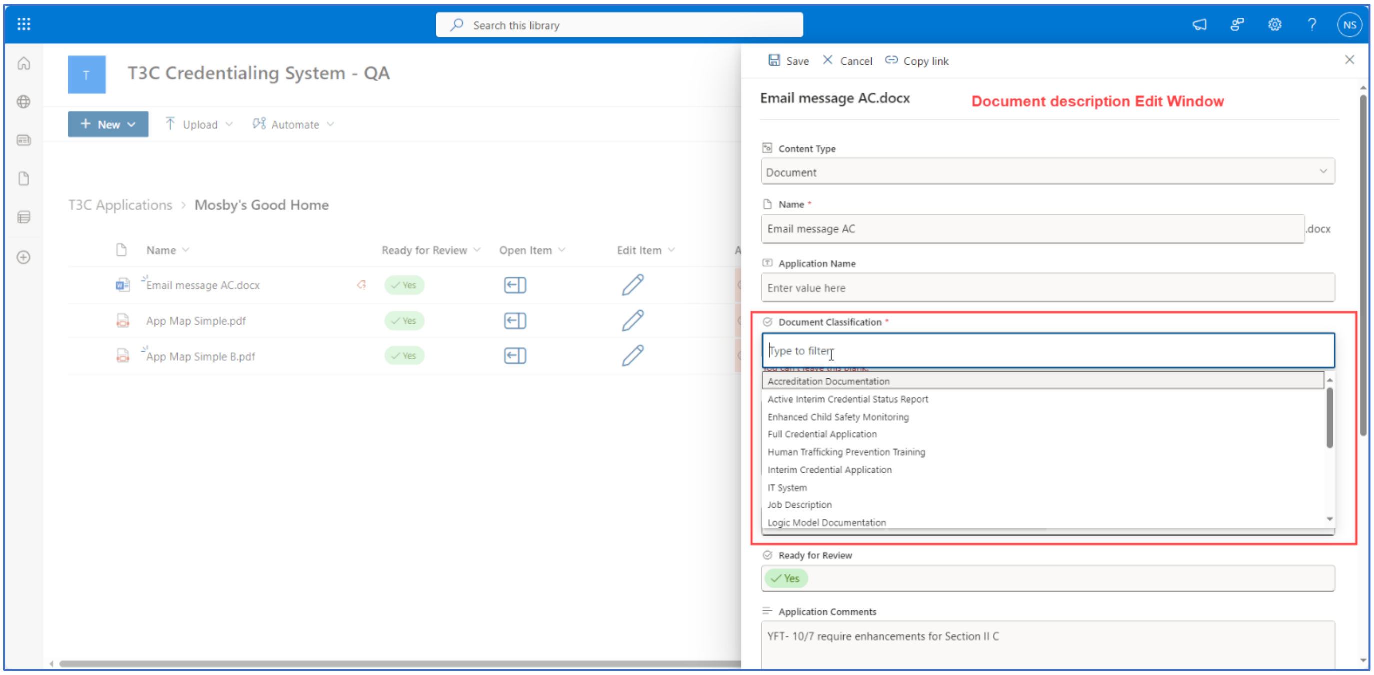
While inside your folder, look to the right of the blue "New" button near the top left corner of the page, where it says "Upload" with a blue arrow pointing up to a line to the left of it. "Upload" will take a gray shade when you hover over it with your curser and a single drop-down, "Files", will appear beneath it. Click on the "Files" option to start the document upload process.



Step 2) Click the gray "Choose File" button, and navigate to select one or more files to upload. For uploading the initial version of a document, make sure that the checkbox for "Add a new version to existing file" ***is not*** checked. Then click "OK".



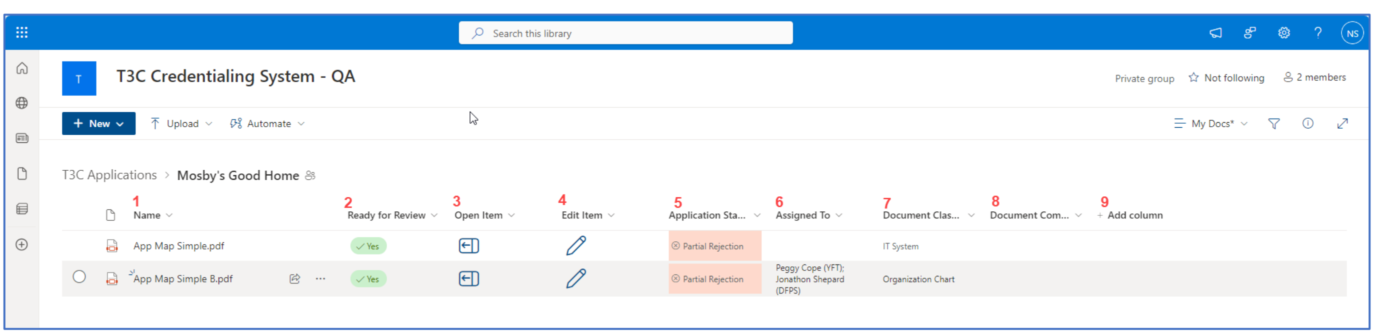
Step 3) The 'Document Description Edit Window' will appear.



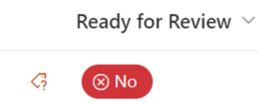
If you selected multiple files to upload at once, you will need to uncheck the radio button to the left of all but one of the files before proceeding.

At the top of the Document Description Edit Window, the 'Content Type' field and 'Name' field of your single selected file will pre-fill based on the file name, but further down, you will be required to select an option from the "Document Classification*" field, which is a dropdown that appears when you click on the field. This is to further assist the reviewers in navigating your documents. You have the option to put a description of what the document contains in the "Document Description" field, but it is not required. Then you can scroll to the bottom and click the blue "Save" button.

You will need to subsequently return to any files that were uploaded simultaneously to identify the Document Classification* for each. To enter the Document Description Edit Window for a single file, click on the pencil icon on the file's row under the column labeled 'Edit Item', labeled below with the number 4.



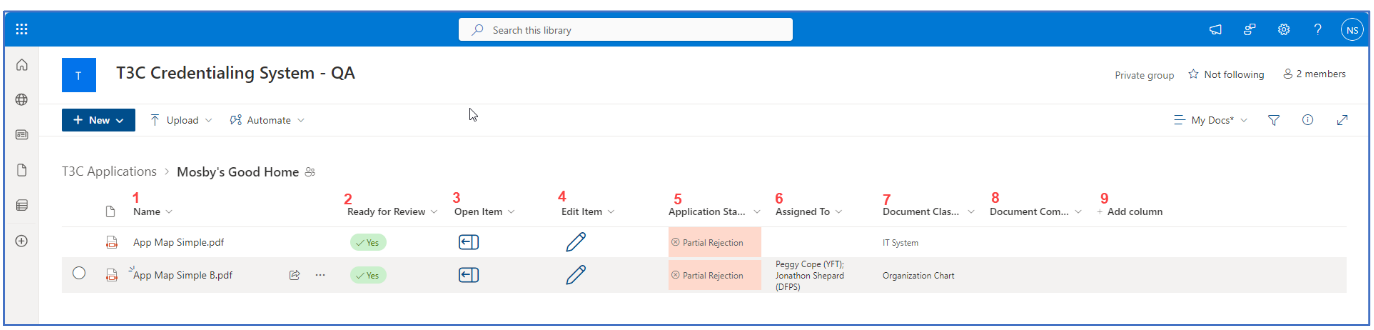
To verify whether a file has had a Document Classification assigned, look to the right of the file name, almost under the next column. If there is an icon of a red ID tag with a question mark, like that pictured below, then the file needs to have a Document Classification assigned.



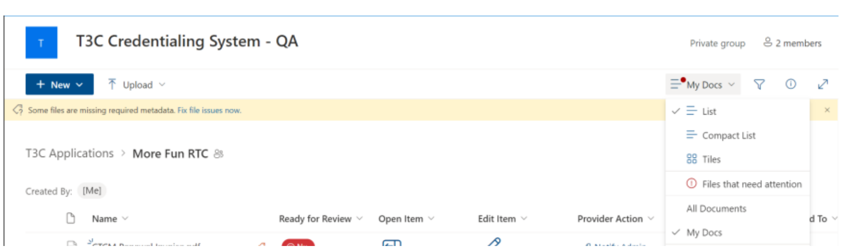
Remember that DFPS and YFT will not review any of your uploaded documents until you have uploaded all of your documents and complete the "Ready for Review" process identified below.

Navigating the Uploaded Documents

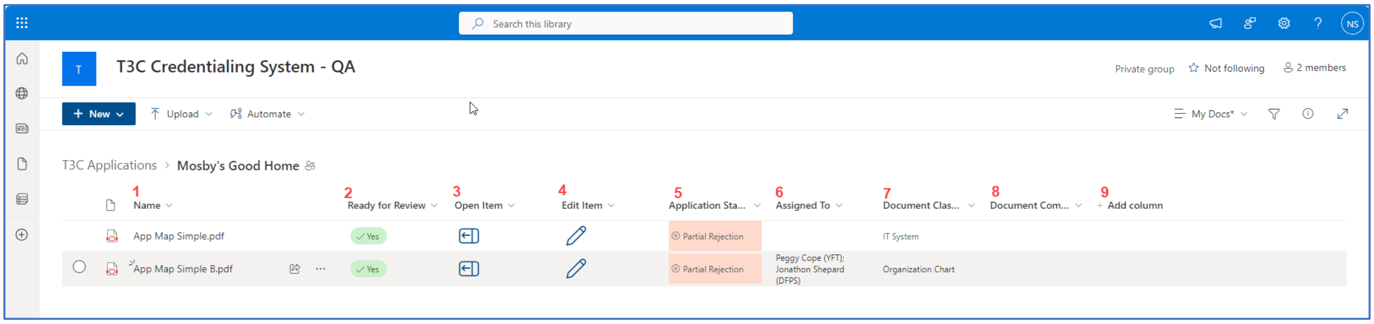
Step 1) If you don't see documents in your Folder that were previously uploaded, and you have not yet identified your Application as 'Ready for Review', you may need to adjust the view. Towards the upper right-hand corner of the screen, you may see three horizontal lines to the left of a 'My Docs' button that has a drop-down arrow to it's right.



When you click on the 'My Docs' button, there will be options in the drop-down list including "All Documents" and "My Docs". If there is a checkmark next to "My Docs", click on "All Documents". This should force all uploaded files in the Folder to be visible once more.



Step 2) When the provider is in the Folder, and has uploaded documents, there are columns with various pieces of useful information that can be quickly viewed. The columns can be expanded and compacted by hovering in the space between the column headers so that a dual-ended arrow ⟷ appears allowing you to adjust the column sizing.



The numbers below correspond to the numbered columns in the screenshot above.

1. "Name" – the document name
2. "Ready for Review" button – the provider clicks this button to turn it to green when a document is ready for review.
3. "Open Item" button – used to open the selected document.
4. "Edit Item" button – used to open the "Document Description Edit Window" for the selected document, allowing the provider to update selections, descriptions, and review/enter comments.
5. Application Status – displays the current review status of the applicant, as indicated by the Reviewers.
6. Assigned To – displays the Reviewers whom the applicant has been primarily assigned to (although they may not be the only Reviewers to work with the application).
7. Document Classification – displays the classification that the provider has assigned to the selected document.
8. Document Comments – displays any comments added to the selected document, by the provider or the Reviewers.

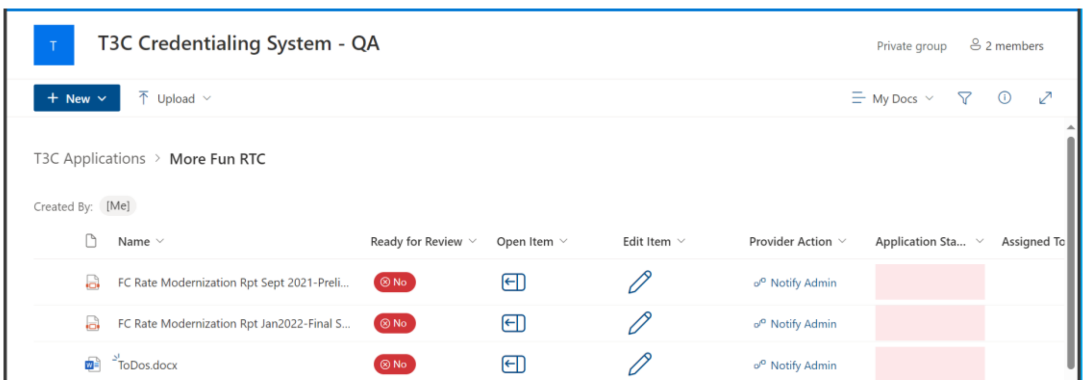
You may also see a column for 'Created By' which displays the email "name" of the primary contact who uploaded the document.

The provider can open and view an uploaded file by clicking on the name of your document under the column labeled 'Name', or you can click on the icon of opening an envelope under the 'Open Item' column.

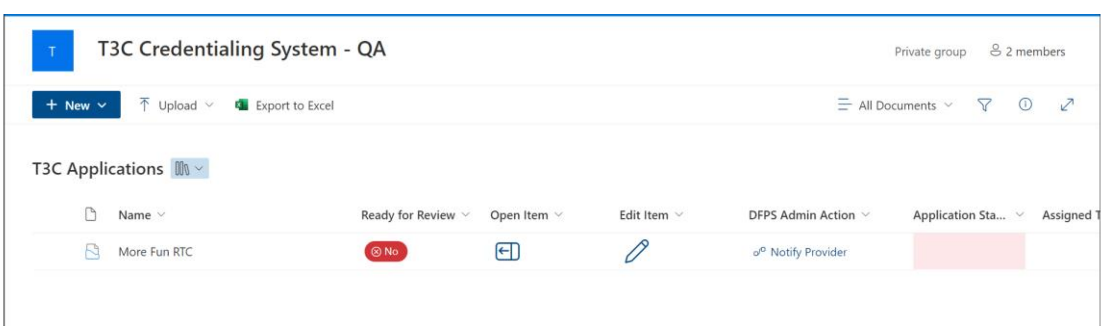
Ready For Review

When all documents – including the signed Interim Credential Application document, as well as all supporting documentation noted throughout the Application – have been uploaded, *no further edits need to be made*, and all files have the required Document Classification selected so that there are no error messages, then the provider may be ready to move on. The provider should review the documents present in the folder a final time – the entirety of all of the documents must be ready, or the provider is not ready to indicate that the documents are 'Ready for Review'.

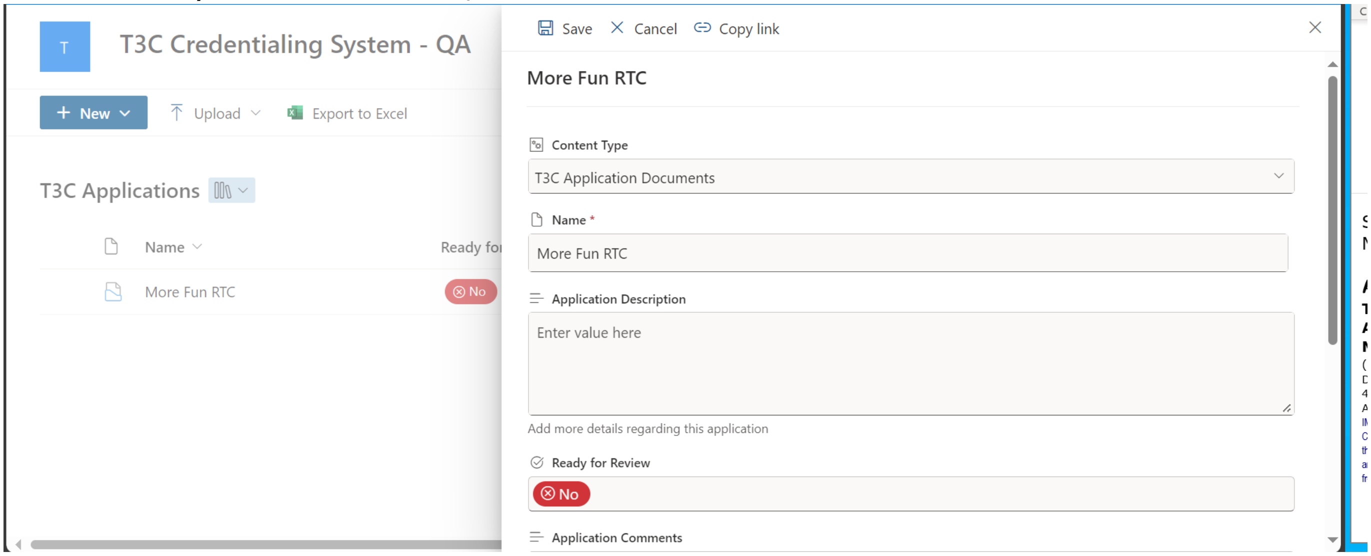
Step 1) First the provider needs to navigate up a level, from within their Folder where they can see the list of uploaded documents, to the Application Folder view. Look at the label near the top left corner of the page, beneath the blue "New" button, which is "T3C Applications > More Fun RTC" in the below example screenshot. Remember that your current location is what is to the right of the ">", so you are currently within your folder. To go up a level, click on what is to the left of ">", so "T3C Applications" in the below example.



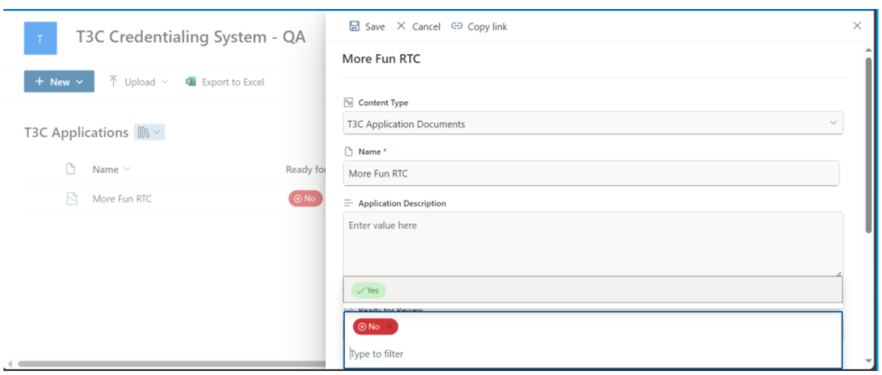
Step 2) Now that you are on the Application Folder Level view, navigate to the 'Application Description Edit Window' by clicking on the pencil icon under the 'Edit Item' column.



Step 3) In the Application Description Edit Window, scroll down to the 'Ready for Review' field. Since this is your initial submission of your documents for review, this will currently be either blank, or colored red and set to "No".



Click on the button, and select the green "Yes" version of the button. Then you can scroll to the bottom of the window and click the blue "Save" button.



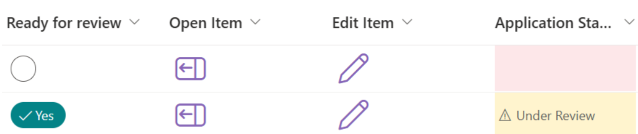
After the Application Folder has been set to 'Yes' for the "Ready for Review" status, once you log out, upon your next log-in, all of the documents within the Application Folder will also convert to 'Yes' for "Ready for Review" status.

Note: Once the Application Folder has been set to 'Yes' for the "Ready for Review" status, the provider is *not to make any edits or add documents* until after the review is complete and the provider receives instructions to their primary email address on next steps. The Credentialing Platform does have a viewable record of changes made, and failure of the provider to refrain from making changes after setting the "Ready for Review" status to 'Yes' could result in Rejection of the provider's current Application.

Application Status

When the Provider changes the 'Ready for Review' button to "Yes", the application will be queued for the Interim Credential eligibility review. The provider will know that their eligibility review has begun when the primary contact email receives an auto-generated notification with the Subject Line "Review Initiated of T3C Application". The Provider does not need to take any action in response to this email, it is for informational purposes only.

If the Provider does log in to the Platform before receiving an email notification with a request for enhancements from DFPSProviderCredentialing@dfps.texas.gov, you will find that you can no longer view your uploaded documents, as they have been moved to a separate folder for review to ensure version control. However, the Provider would see that the 'Application Status' field now reflects a status of "Under Review".

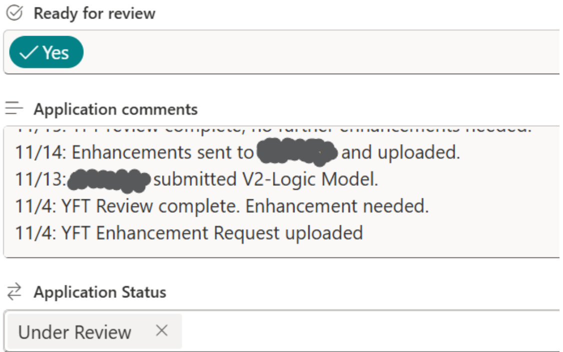


If the Provider receives an auto-notification email with an Application Status specified in the Subject Line, such as "An Application has been Approved" or "An Application has been Rejected", they will also receive an email providing details on the determination and next steps.

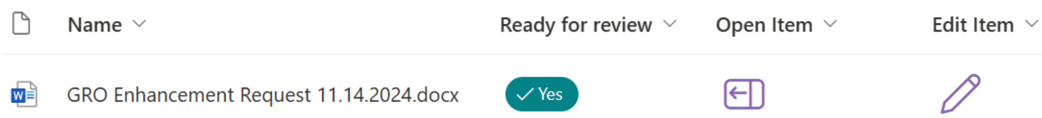
Viewing Feedback From Reviewers

Upon receiving an instructional email to the primary contact email address from DFPS or YFT to log in to the Credentialing Platform to review feedback and any requests for enhancements, which will have a ***limited time frame to be completed***, the provider should immediately log in.

On the Application Folder level, the Provider should access the 'Application Description Edit Window', by clicking on the pencil icon under the column labeled "Edit Item", their "Application Comments" field will display the start of a running log of the key touchpoints in the review process by DFPS and YFT. The most recent actions will be at the top.



Step 1) The Provider should navigate into their Application Folder. There should be one or more documents uploaded by the reviewers, DFPS and YFT. The documents will have a label in the 'Document Classification' column, identifying them as either "DFPS-Provider Feedback" or "YFT-Provider Feedback".



Step 2) The Provider should open the document/s and review the Technical Assistance provided and address requests for enhancements, ensuring that they understand the deadline for completion. The provider does not need to enter any response.

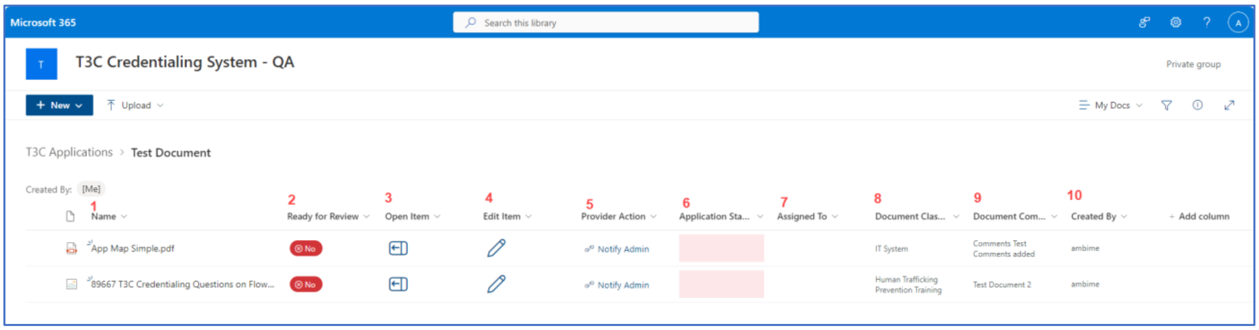
Step 3) The Provider should promptly make all edits to address all of the requested enhancements to the document outside of the Credentialing Platform. The Provider should save the edited file with a new file name as indicated by the request for enhancements, ensuring that it includes a date of upload at the end. When all updates are complete, upload the new versions of any files, as well as any new additional supporting documentation into your folder in the Credentialing Platform, and send an email to DFPSProviderCredentialing@dfps.texas.gov with the subject line "{Provider Name} Enhancements Ready" by the deadline indicated.

Note: Failure to meet the deadline, failure to address all areas of Technical Assistance with enhancements, or a lack of good faith effort resulting in a lack of significant progress over time *can result in Rejection of the Application*.

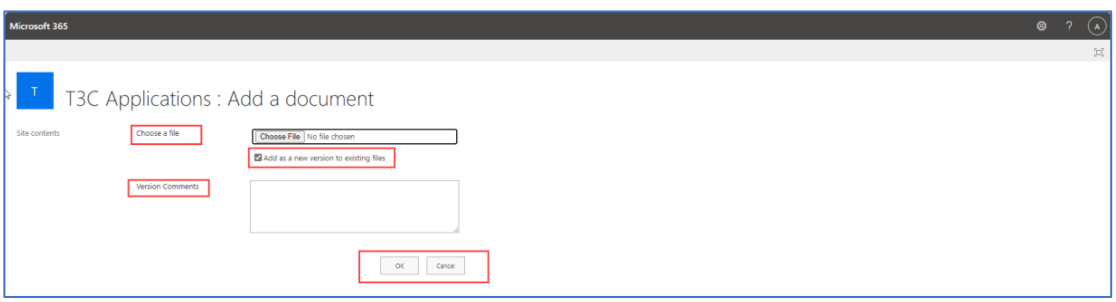
Document File Versioning

To assist providers in ensuring that they are utilizing the necessary version control, the Platform has been outfitted with the ability to identify a new document version at the time of upload.

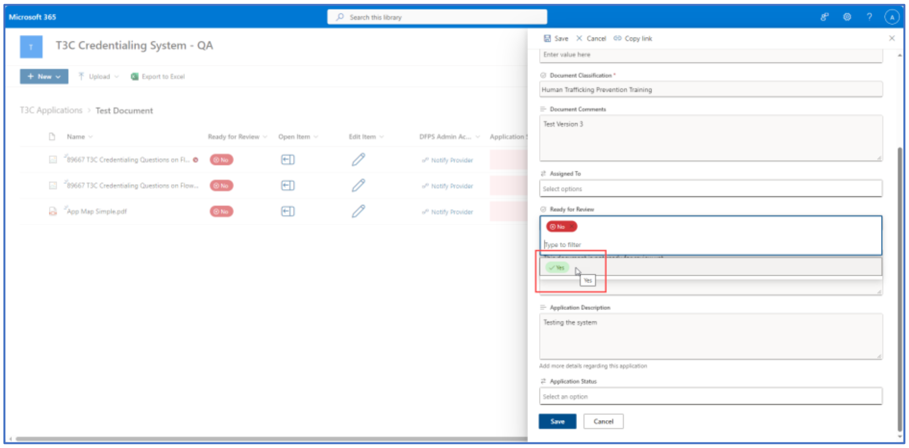
Step 1) While in the Application Folder, the provider moves the curser near the top left corner to select the "Upload" button and the "Files" drop-down that appears beneath it.



Step 2) Click the gray "Choose File" button, and navigate to select the updated/ enhanced version of the currently uploaded file. Since the provider is uploading the updated/enhanced version of a document, make sure that the checkbox for "Add a new version to existing file" ***is*** checked, and that comments regarding the new version are entered in the "Version Comments" field. Then click "OK".



Step 3) The Document Description Edit Window will appear. You will need to identify the "Document Classification*" of the updated/enhanced document, which should be the same as what was selected for the prior version of the document. You should ensure that your comments entered regarding the new version appear in the "Document Comments" field. Then you can scroll to the bottom and click the blue "Save" button.


Microsoft 365
Search this library
T3C Credentialing System - QA
New
Upload
Export to Excel
T3C Applications > Test Document
Name
Ready for Review
Open Item
Edit Item
DFPS Admin Ac...
89667 T3C Credentialing Questions on Fl...
89667 T3C Credentialing Questions on Flow...
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Document Classification
Human Trafficking Prevention Training
Document Comments
Test Version 3
Assigned To
Select options
Ready for Review
No
Type to filter
Yes
Application Description
Testing the system
Add more details regarding this application
Application Status
Select an option
Save
Cancel