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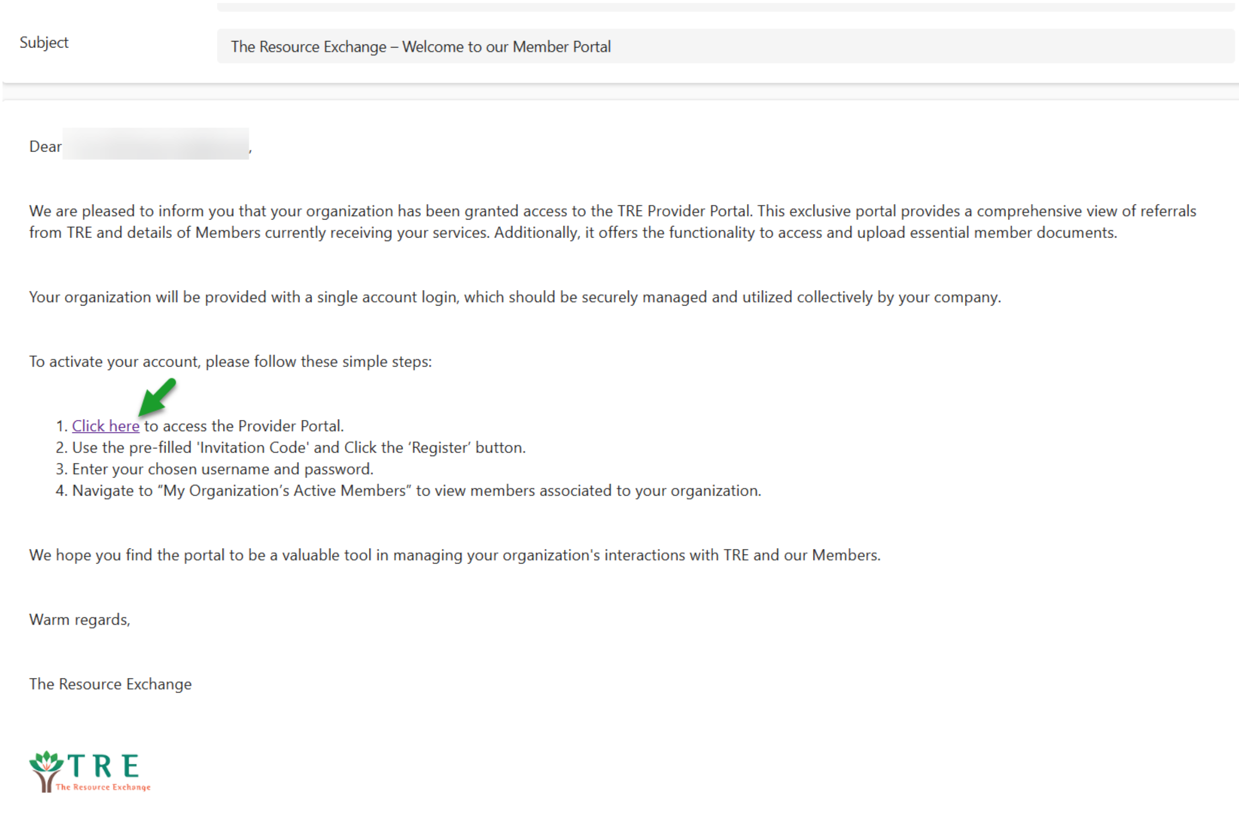
(Hover over the link and use “ctrl + click” to navigate to the needed section)

How to Login to Your Provider Portal

1. You will receive an invite from the Resource Exchange (TRE) to access the Provider Portal
2. In the invite, there will be a link “Click here”
    a. Click the link and you will be re-directed to the registration page



Subject The Resource Exchange – Welcome to our Member Portal

Dear ,

We are pleased to inform you that your organization has been granted access to the TRE Provider Portal. This exclusive portal provides a comprehensive view of referrals from TRE and details of Members currently receiving your services. Additionally, it offers the functionality to access and upload essential member documents.

Your organization will be provided with a single account login, which should be securely managed and utilized collectively by your company.

To activate your account, please follow these simple steps:

1. Click here to access the Provider Portal.
2. Use the pre-filled 'Invitation Code' and Click the ‘Register’ button.
3. Enter your chosen username and password.
4. Navigate to “My Organization’s Active Members” to view members associated to your organization.

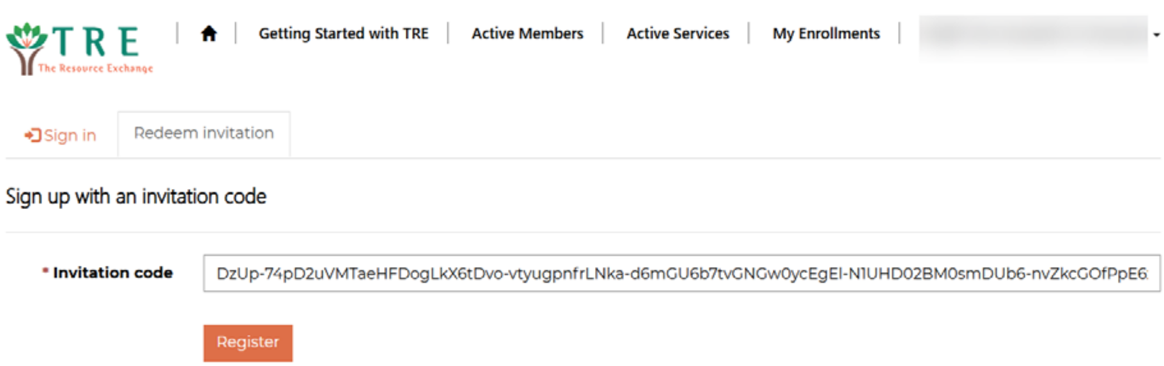
We hope you find the portal to be a valuable tool in managing your organization's interactions with TRE and our Members.

Warm regards,

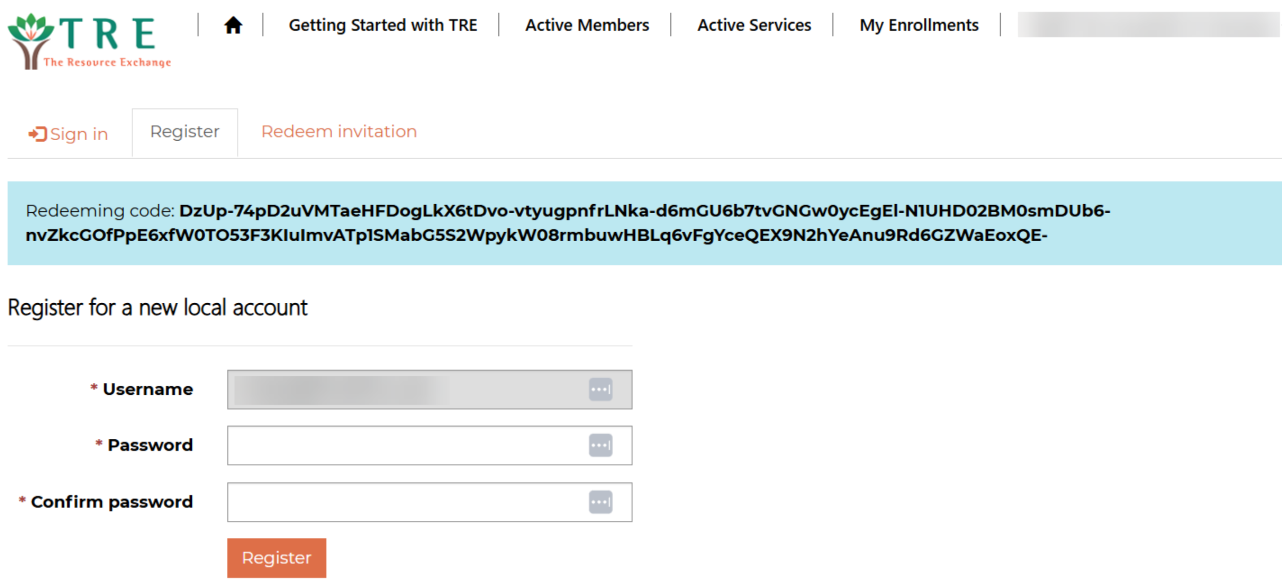
The Resource Exchange

TRE The Resource Exchange

3. On this page, a unique code will auto-populate in the “Invitation Code” box
    a. Leave this code as-is
    b. Continue by clicking, “Register”

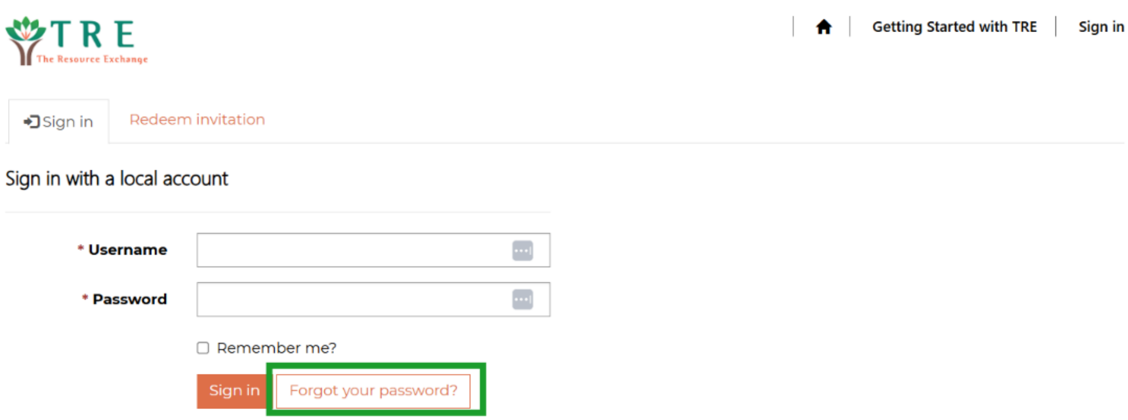


4. You will be brought to the next page where you will see your username and password
    a. Your username will default to the email address that received the invitation
    b. This cannot be changed/updated
        - Any change would be made by contact Laura Thomas llthomas@tre.org
5. Enter your password and confirm it
6. Click "Register" to complete your registration

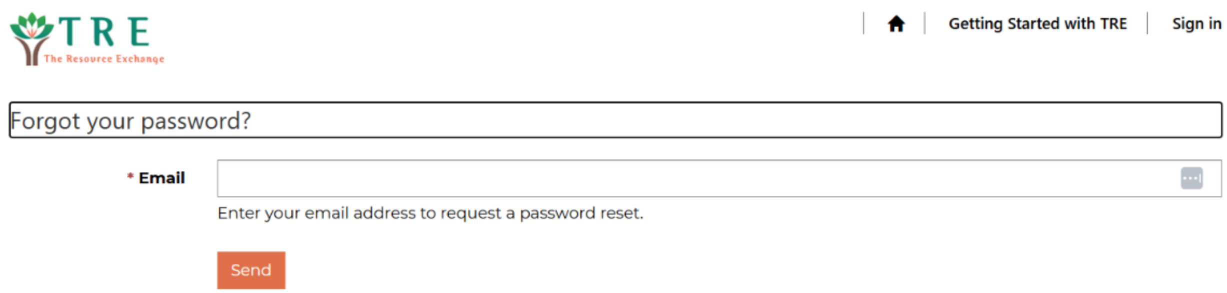


How to Reset Your Password

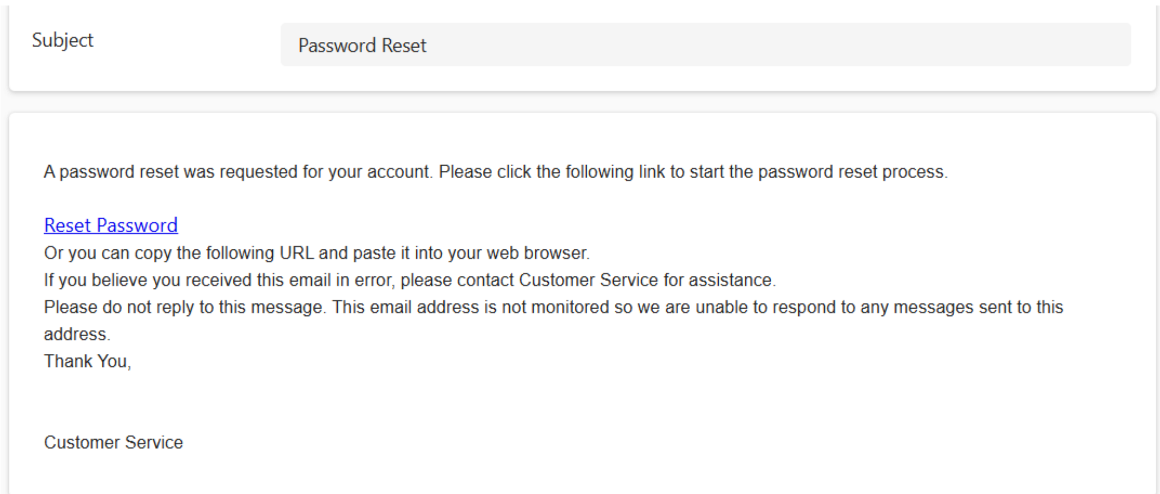
1. If you forget your password when signing in, click "Forget Password"



2. You will be required to enter the email you registered with.

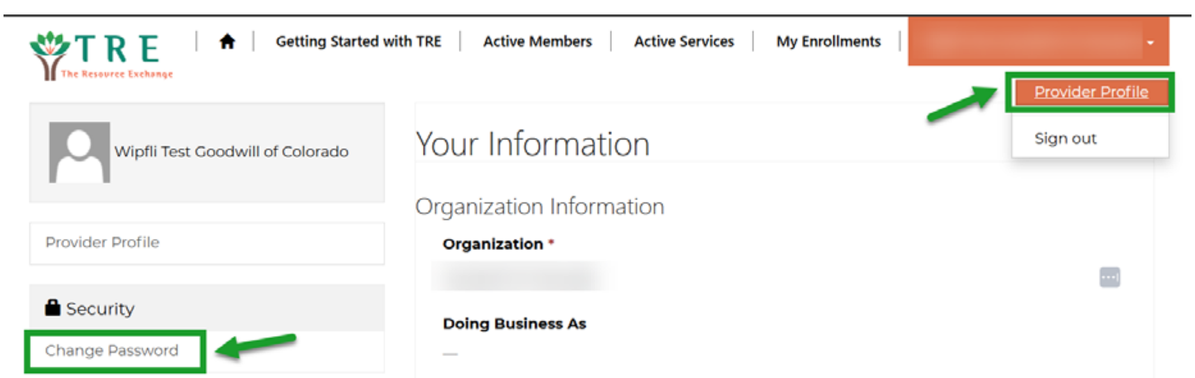


3. After you click "Send", you will receive an email with instructions on to reset your password



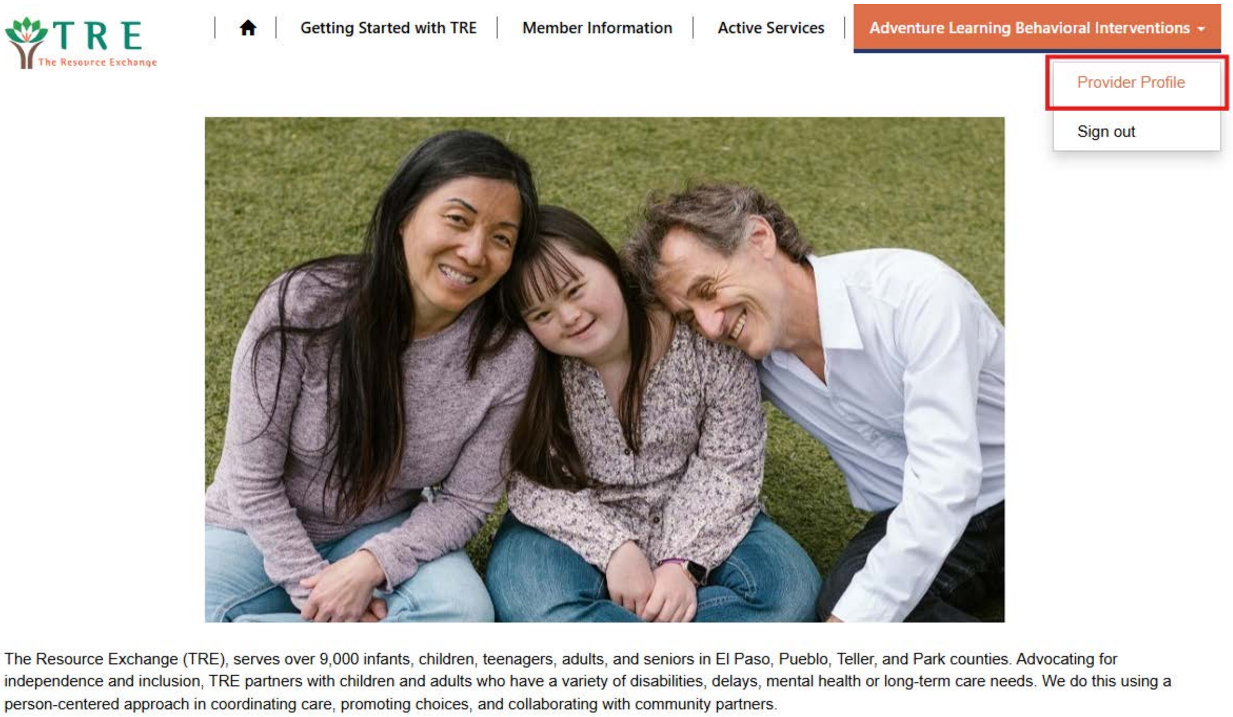
4. Enter your new password and click "Reset"

5. If at any time you need to reset your password while you're logged in, you can navigate to your Provider Profile to reset it

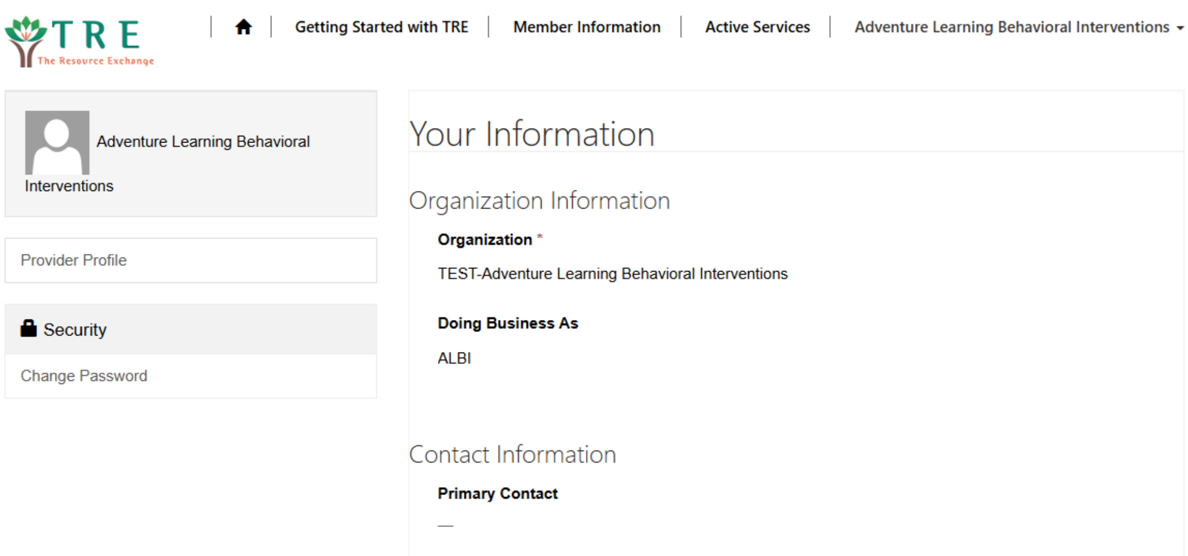


Navigating the Provider Profile

1. In the upper right-hand corner click the carrot down button next to the Provider name
2. Click "Provider Profile"



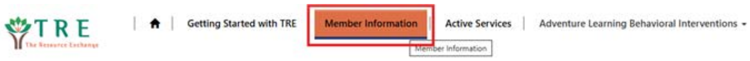
3. Here you will find your agency's information
4. You can edit Contact Information
5. Contact Laura Thomas if you need to change any of the locked fields



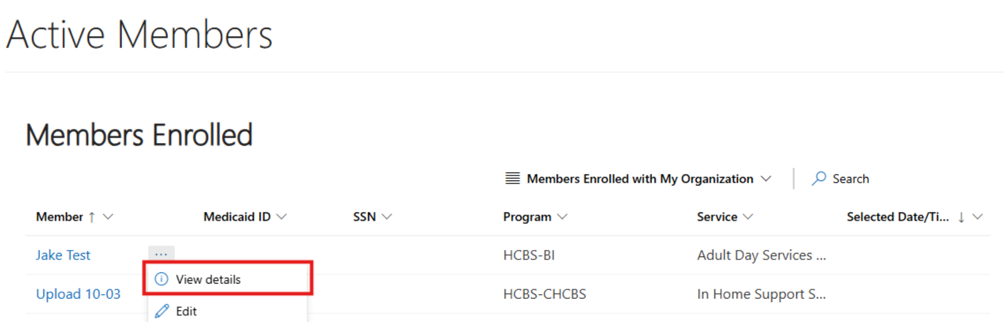
Member Information

Active Members

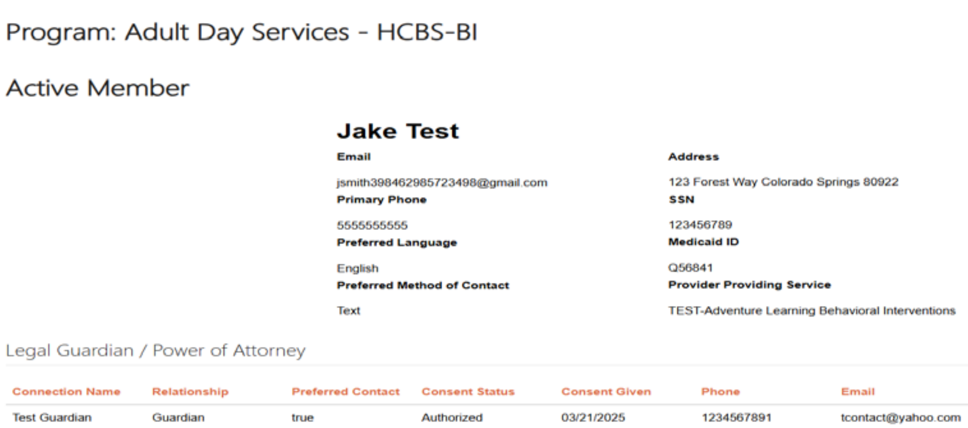
1. Active Members are members that have selected you as an agency to provide a specified service *note – Even though a member may show in this section, you are not authorized to provide services prior to receiving an active PAR*
2. Click the Member Information Tab located at the top toolbar of the Provider Portal



3. To view the details of the member, click the three dots to the right of their name, then "view details“or single-clicking the member’s name



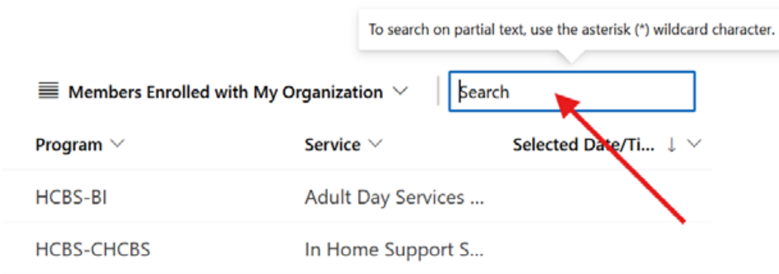
4. This page will show you the details on that active member
5. This page includes demographic information, Guardian/POA, associated TRE documents, and the contact information of TRE staff supporting this individual
6. You are also able to contact TRE staff through this page



Options to Navigation a List of Members

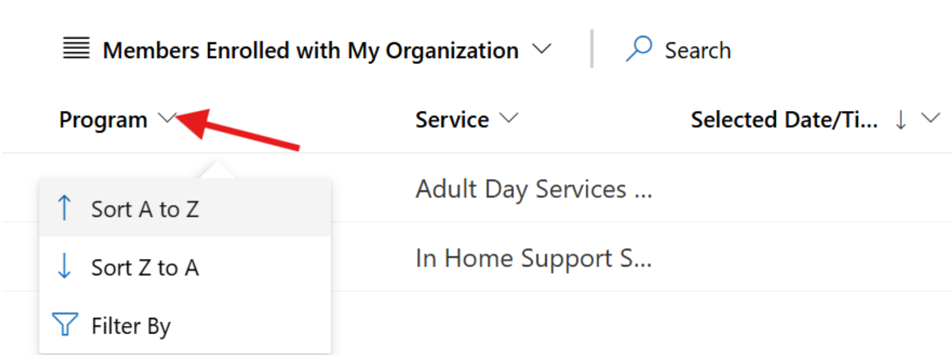
Searching

1. When searching any list of members you can find them by clicking in the search bar at the top right of the list
2. If you would like to search partial text you can use an asterisk (*) before entering into the field



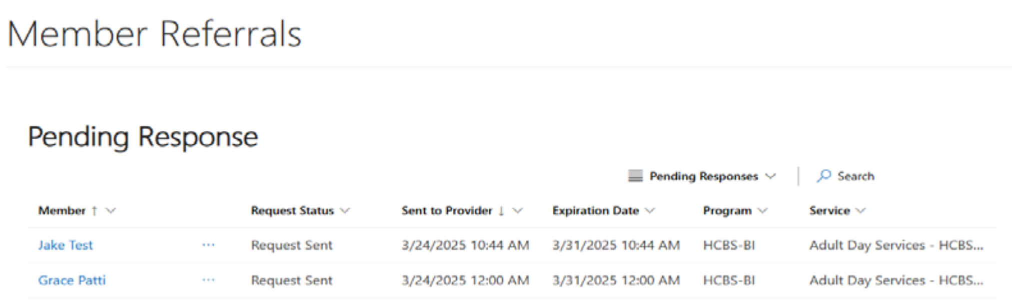
Sorting and Filtering

1. You can also sort and filter any column within the list by clicking the caret next to the column title
2. Sorting allows you to organize the data alphabetically or numerically in descending or ascending order

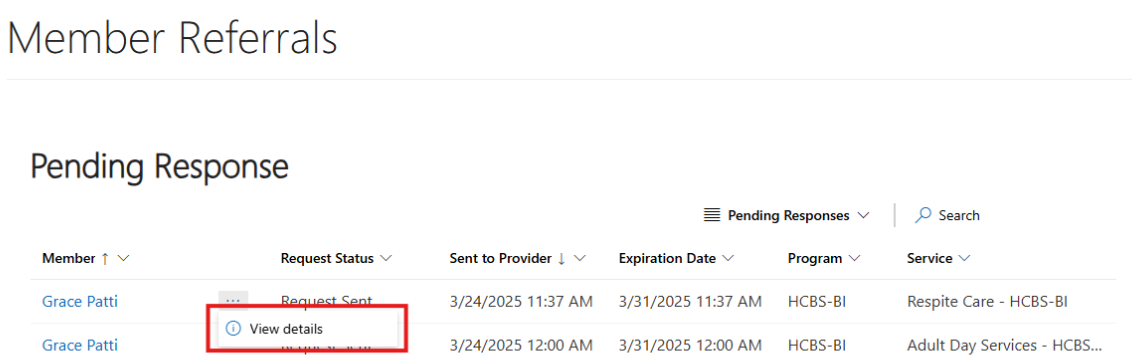


Pending Response Section

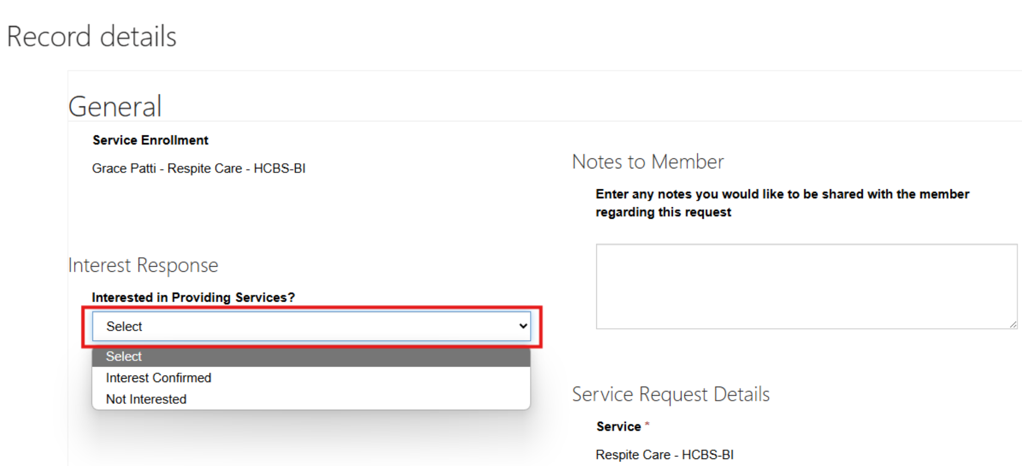
1. These are members who have sent a Service Request to your agency in the last 5 business days that you have not yet responded to.
2. Scroll down to Member Referrals



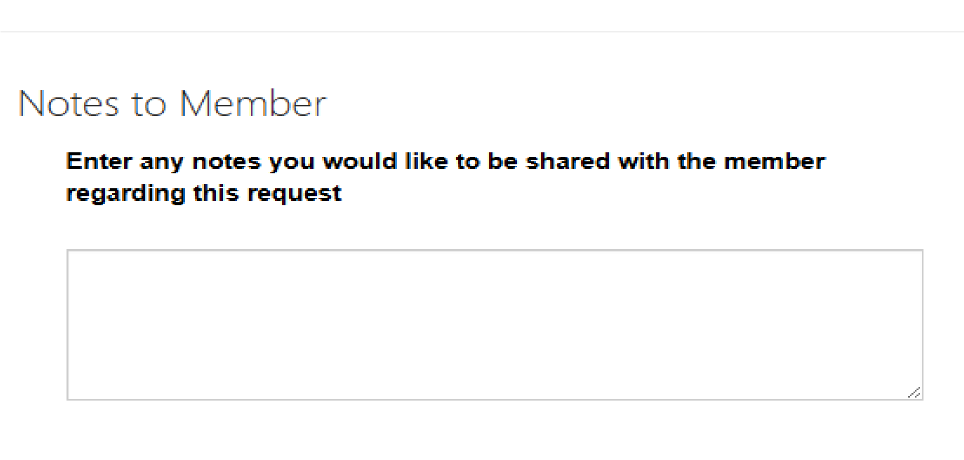
3. To view the details of the Service Request, click the three dots next to their name then "view details"



4. Respond directly to Service Requests on this page
5. Click the drop down to select if you are interested in providing Services or not
6. Click submit after the Service Request has been reviewed and you have made the decision of if you would like to move forward with the process

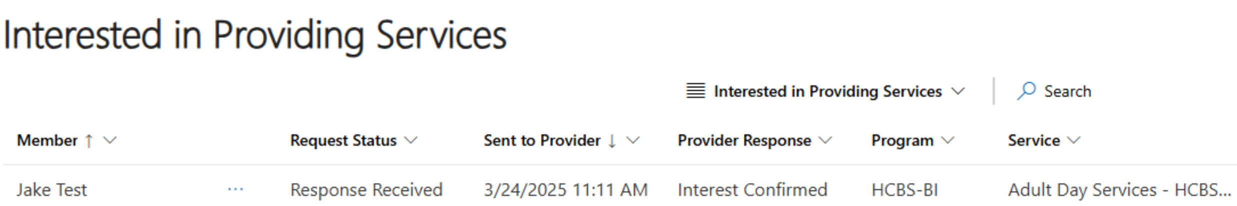


7. Here is where you can provide any additional information to the member, such as a note about why someone should select your agency
8. Please include the best email and/or phone number for the member to respond to
9. This information will be shared with the member by the Service Coordinator after the 5 days for the request have concluded



Interested in Providing Services Section

1. Here is the list of members you have identified and responded to stating that you are interested in moving forward with the Service Request process



2. To edit your response in providing services, click the three dots next to their name, then edit
   - You can edit whether or not you are still interested in providing services here

Not Selected to Provide Services

- Here you can find a list of the members that did not select you as a provider.

Not Selected to Provide Services

Not Selected to Provide Services | Search

Member	Request Status	Sent to Provider	Provider Response	Accept/Reject Email Sent ...	Program	Service
Romeo Doubs	Provider Not Select...	3/24/2025 11:48 AM	Not Interested	3/24/2025 11:50 AM	HCBS-BI	Respite Care - H

Expired Requests

- Service Requests that have exceeded the five business days to respond to and you are no longer able to respond. These will fall off after 30 days.

Expired Requests

Expired Requests | Search

Member	Request Status	Sent to Provider	Program	Service

No records to show

Managing Member Documents

How to Manage Member Documentation

1. To access member documents, you can single-click on their name in the “Members Enrolled” section under the “Member Information” tab on the top toolbar
2. A member will be noted here once they have selected your agency
    - This DOES NOT necessarily mean they have an approved PAR

Active Members

Members Enrolled

Members Enrolled

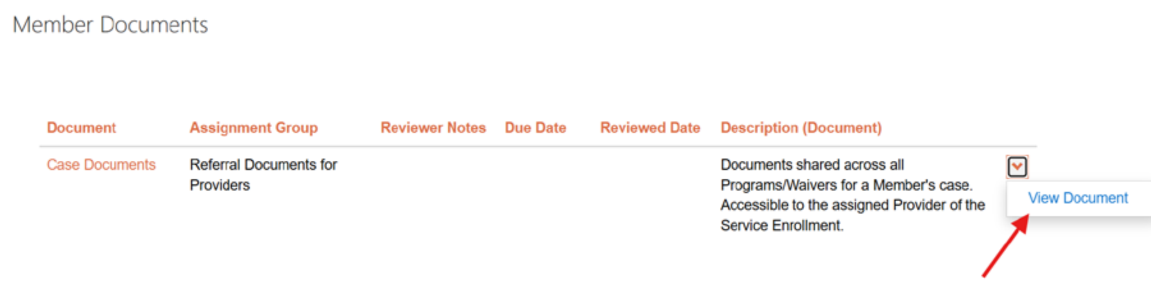
Member		Medicaid ID	SSN	Program
Jake Test	···	Q56841	123456789	HCBS-BI
Upload 10-03	···			HCBS-CHCBS

Downloading Member Documents from TRE

1. To view any documents that TRE has connected to that member’s profile you will go to the “Member Documents” section and click the caret next to any document you would like to view and click “View Document”

2. It is your agency’s responsibility to pull any documents from this area and save them as needed as this will be the way that TRE is sharing this documentation

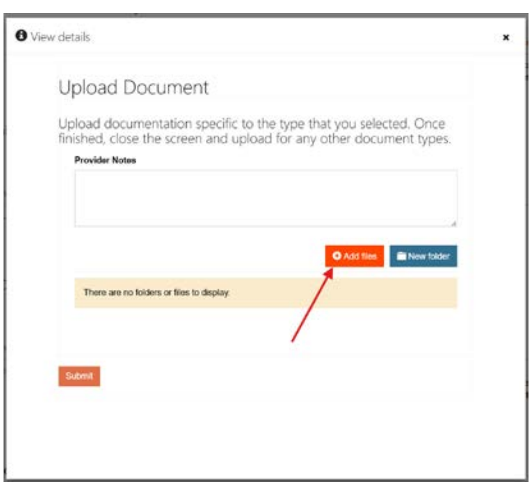
3. Once a member is disconnected from your agency in the Vault, you will **no longer have access to download this documentation**



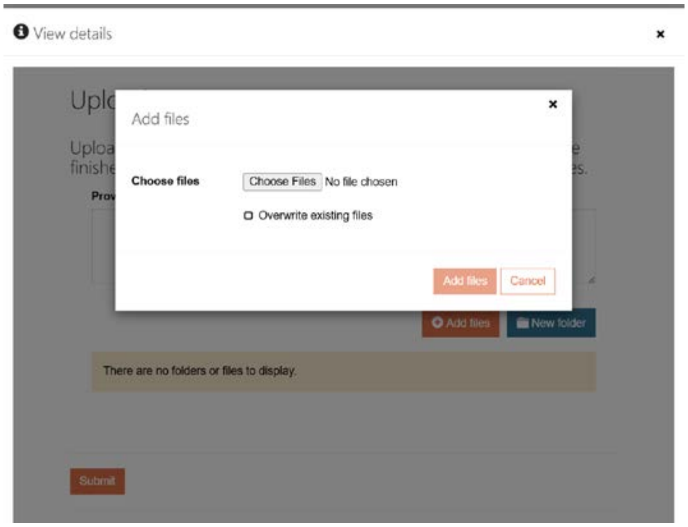
How to Upload Documents to Share with TRE

1. To upload any documents that you would like to share with TRE, go to the “My Organization’s Document Uploads” section and click the caret at the end of the row and select “Add Documents”

2. A pop-up window will appear to upload the document, please enter any necessary notes and select “Add Files”



3. You can then upload any documents from your device by selecting the "Choose Files" option
4. Upload any documents using the naming format of "Document Name, mm.dd.yyyy, Member Last Name, Member First Name"
5. Click "Add files" to attach the documents
6. Finish the process by clicking "Submit"



Examples of Documents that You May Upload

- Behavior Assessments and Behavior Plans
- Plans of Care
- IHSS Shared Responsibility Form
- Informed consents
- Rights Modification Forms
- PMIP
- Protocols
- Residential or Day skills assessment
- Health and Safety Assessments
- Medical forms
- Court orders

Managing Your Agency's Active Services

1. You can view what services you are approved to provide by clicking the "Active Services" tab in the top toolbar

2. If there are any services that do not appear to be accurate, please contact Laura Thomas llthomas@tre.org to address any concerns