

Table of Contents

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

How to Login to Your Provider Portal..... 2

How to Reset Your Password ..... 3

Navigating the Provider Profile ..... 5

Member Information ..... 6

    Active Members ..... 6

    Options to Navigation a List of Members..... 7

        Searching ..... 7

        Sorting and Filtering..... 7

    Pending Response Section ..... 8

    Interested in Providing Services Section ..... 9

    Not Selected to Provide Services..... 10

    Expired Requests ..... 10

Managing Member Documents..... 10

    How to Manage Member Documentation..... 10

    Downloading Member Documents from TRE ..... 11

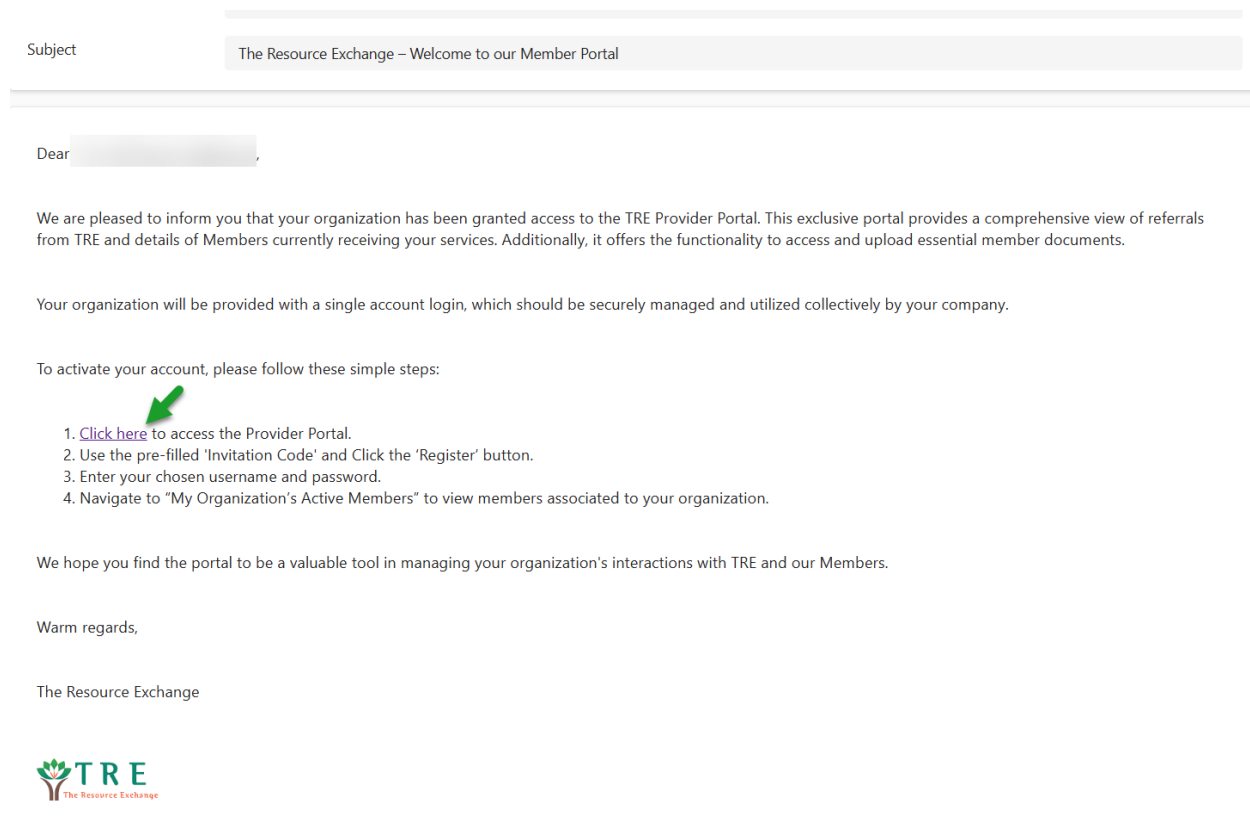
    How to Upload Documents to Share with TRE ..... 11

    Examples of Documents that You May Upload ..... 12

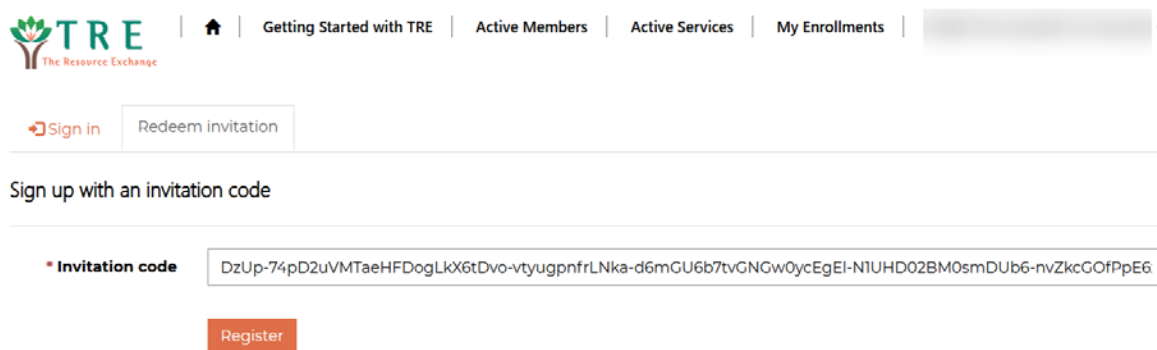
Managing Your Agency’s Active Services ..... 13

# 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



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](mailto:llthomas@tre.org)
5. Enter your password and confirm it
6. Click “Register” to complete your registration

 |  | [Getting Started with TRE](#) | [Active Members](#) | [Active Services](#) | [My Enrollments](#) | 

[Sign in](#) | [Register](#) | [Redeem invitation](#)

**Redeeming code: DzUp-74pD2uVMTaeHFDogLkX6tDvo-vtyugpnfrLNka-d6mGU6b7tvGNGw0ycEgEI-N1UHD02BM0smDUB6-nvZkcGOfPpE6xfW0T053F3KIulmvATpISMabG5S2WpykW08rmbuwHBLq6vFgYceQEX9N2hYeAnu9Rd6GZWaEoxQE-**

Register for a new local account

\* Username



\* Password

\* Confirm password

Register

## How to Reset Your Password

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

 |  | [Getting Started with TRE](#) | [Sign in](#)

[Sign in](#) | [Redeem invitation](#)

Sign in with a local account

\* Username

\* Password

☐ Remember me?

Sign in

Forgot your password?

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

[Getting Started with TRE](#)[Sign in](#)

Forgot your password?

\* Email

Enter your email address to request a password reset.

Send

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

Subject

Password Reset

A password reset was requested for your account. Please click the following link to start the password reset process.

[Reset Password](#)

Or you can copy the following URL and paste it into your web browser.

If you believe you received this email in error, please contact Customer Service for assistance.

Please do not reply to this message. This email address is not monitored so we are unable to respond to any messages sent to this address.

Thank You,

Customer Service

4. Enter your new password and click "Reset"

[Getting Started with TRE](#)[Sign in](#)

Reset password

New password

Confirm new password

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

[Getting Started with TRE](#)[Active Members](#)[Active Services](#)[My Enrollments](#)

Wipfli Test Goodwill of Colorado

Provider Profile

Security

Change Password

Your Information

Organization Information

Organization \*

Doing Business As

Provider Profile

Sign out

# 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"

[Getting Started with TRE](#)[Member Information](#)[Active Services](#)[Adventure Learning Behavioral Interventions ▾](#)[Provider Profile](#)[Sign out](#)

The Resource Exchange (TRE), serves over 9,000 infants, children, teenagers, adults, and seniors in El Paso, Pueblo, Teller, and Park counties. Advocating for independence and inclusion, TRE partners with children and adults who have a variety of disabilities, delays, mental health or long-term care needs. We do this using a person-centered approach in coordinating care, promoting choices, and collaborating with community partners.

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

[Getting Started with TRE](#)[Member Information](#)[Active Services](#)[Adventure Learning Behavioral Interventions ▾](#)

Adventure Learning Behavioral  
Interventions

[Provider Profile](#) **Security**[Change Password](#)

## Your Information

### Organization Information

**Organization \***

TEST-Adventure Learning Behavioral Interventions

**Doing Business As**

ALBI

### Contact Information

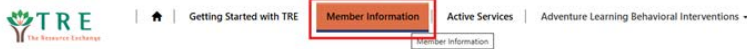
**Primary Contact**

—

# 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

## Active Members

### Members Enrolled

Members Enrolled with My Organization ▾   🔍 Search					
Member ▴ ▾	Medicaid ID ▾	SSN ▾	Program ▾	Service ▾	Selected Date/Ti... ▴ ▾
Jake Test			HCBS-BI	Adult Day Services ...	
Upload 10-03	<div>⋮ View details</div> <div>Edit</div>		HCBS-CHCBS	In Home Support S...	

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

Program: Adult Day Services - HCBS-BI

### Active Member

#### Jake Test

##### Email

jsmith398462985723498@gmail.com

##### Primary Phone

5555555555

##### Preferred Language

English

##### Preferred Method of Contact

Text

##### Address

123 Forest Way Colorado Springs 80922

##### SSN

123456789

##### Medicaid ID

Q56941

##### Provider Providing Service

TEST-Adventure Learning Behavioral Interventions

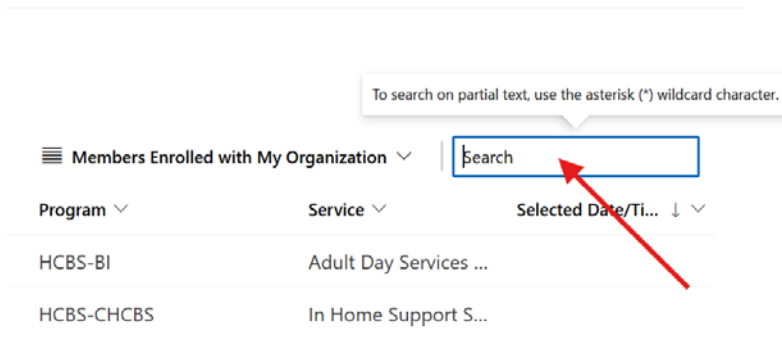
### Legal Guardian / Power of Attorney

Connection Name	Relationship	Preferred Contact	Consent Status	Consent Given	Phone	Email
Test Guardian	Guardian	true	Authorized	03/21/2025	1234567891	tcontact@yahoo.com

## Options to Navigation a List of Members

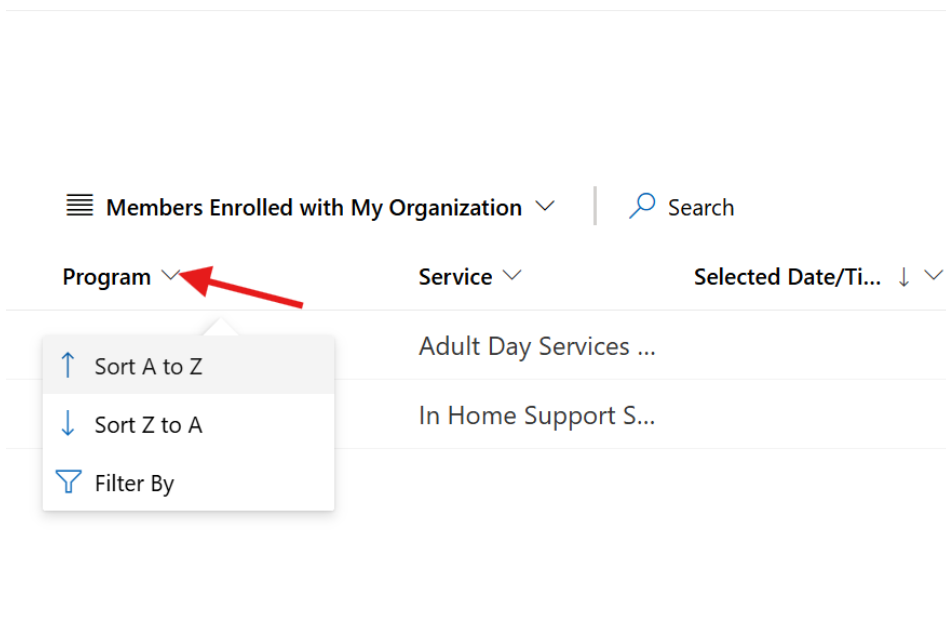
### Searching

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

## Member Referrals

### Pending Response

⌵ Pending Responses ⌵

🔍 Search

Member ⌵		Request Status ⌵	Sent to Provider ⌵	Expiration Date ⌵	Program ⌵	Service ⌵
Jake Test	⋮	Request Sent	3/24/2025 10:44 AM	3/31/2025 10:44 AM	HCBS-BI	Adult Day Services - HCBS...
Grace Patti	⋮	Request Sent	3/24/2025 12:00 AM	3/31/2025 12:00 AM	HCBS-BI	Adult Day Services - HCBS...

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

## Member Referrals

### Pending Response

⌵ Pending Responses ⌵

🔍 Search

Member ⌵		Request Status ⌵	Sent to Provider ⌵	Expiration Date ⌵	Program ⌵	Service ⌵
Grace Patti	⋮	Request Sent	3/24/2025 11:37 AM	3/31/2025 11:37 AM	HCBS-BI	Respite Care - HCBS-BI
Grace Patti	⋮	Request Sent	3/24/2025 12:00 AM	3/31/2025 12:00 AM	HCBS-BI	Adult Day Services - HCBS...

- 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

## Record details

General

Service Enrollment

Grace Patti - Respite Care - HCBS-BI

Notes to Member

Enter any notes you would like to be shared with the member regarding this request

Interest Response

Interested in Providing Services?

Select

Select

Interest Confirmed

Not Interested

Service Request Details

Service \*

Respite Care - HCBS-BI



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

## Notes to Member

**Enter any notes you would like to be shared with the member regarding this request**

## 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

### Interested in Providing Services

Interested in Providing Services ▾   🔍 Search						
Member ↑ ▾		Request Status ▾	Sent to Provider ↓ ▾	Provider Response ▾	Program ▾	Service ▾
Jake Test	...	Response Received	3/24/2025 11:11 AM	Interest Confirmed	HCBS-BI	Adult Day Services - HCBS...

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

### Interested in Providing Services

Member ↑ ▾	Request Status ▾	Sent to Prov	Interest Response
Jake Test	<div>...</div> <div>Response Received</div> <div>3/24/2025</div> <div>  Edit           </div>		<div>Interested in Providing Services?</div> <div>Interest Confirmed ▾</div> <div>Response needed by:</div> <div>—</div>



## 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 ▾
<div></div> <div>No records to show</div>				

## Managing Member Documents

### How to Manage Member Documentation

- 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
- 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**

### Member Documents

Document	Assignment Group	Reviewer Notes	Due Date	Reviewed Date	Description (Document)	
Case Documents	Referral Documents for Providers				Documents shared across all Programs/Waivers for a Member's case. Accessible to the assigned Provider of the Service Enrollment.	<div><input checked="" type="checkbox"/> View Document</div>

## 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"

### My Organization's Document Uploads

Document	Description	Provider Notes	
Provider Uploads	Documents uploaded by the Provider.		<div><input checked="" type="checkbox"/> Add Documents</div>

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

View details

Upload Document

Upload documentation specific to the type that you selected. Once finished, close the screen and upload for any other document types.

Provider Notes

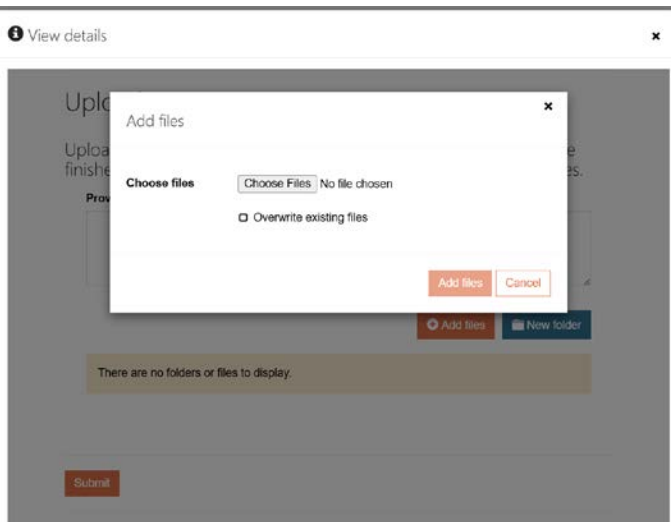
Add Files

New Folder

There are no folders or files to display.

Submit

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](mailto:llthomas@tre.org) to address any concerns



[Home](#) | [Getting Started with TRE](#) | [Member Information](#) | **Active Services** | [Adventure Learning Behavioral Interventions](#) ▾

Home > Active Services

## Active Services

☰ Provider Service Associated View ▾

Provider Service Name ↑ ▾		Program ▾	Service ▾	Provider ▾
<a href="#">HCBS-BI - Adult Day Services - HCBS-BI ...</a>	...	HCBS-BI	Adult Day Services - HCBS-BI	TEST-Adventu
<a href="#">HCBS-BI - Respite Care - HCBS-BI - TEST...</a>	...	HCBS-BI	Respite Care - HCBS-BI	TEST-Adventu