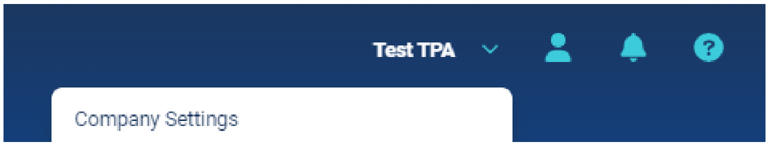
TPS Alert TPA Quick Guide

Company Settings



- To view your company settings, in the right corner of the screen select the drop-down arrow under your company name and select the Company Settings link. This displays the user administrator information as well as users in your account.
  - ***Tip:*** If you need to add TPA employee access, add users in this area. Please note that only the User Administrator can add, remove or edit employee access.

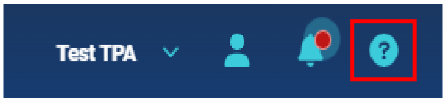
User Profile

- To find your individual user information, select the User Profile icon in the upper right corner of the screen and select Profile. This contains your contact information, notification preferences, credit card information and password preferences.
  - ***Tip:*** Notifications for new enrollments, lost client enrollments and new contractor audits are off by default. If you want to turn these on, make updates in this area.

Announcements

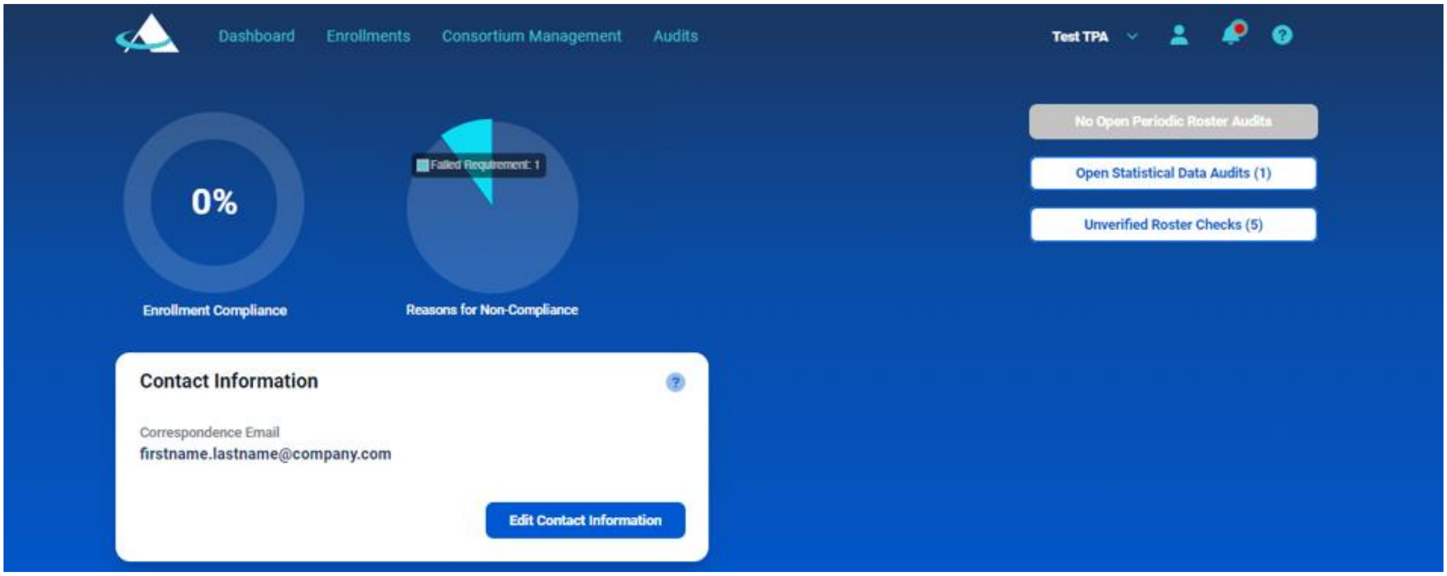
- The announcement icon will reflect a flashing red circle when there are new announcements. Once this icon is selected, announcements will display in a right collapsible window.

Chat



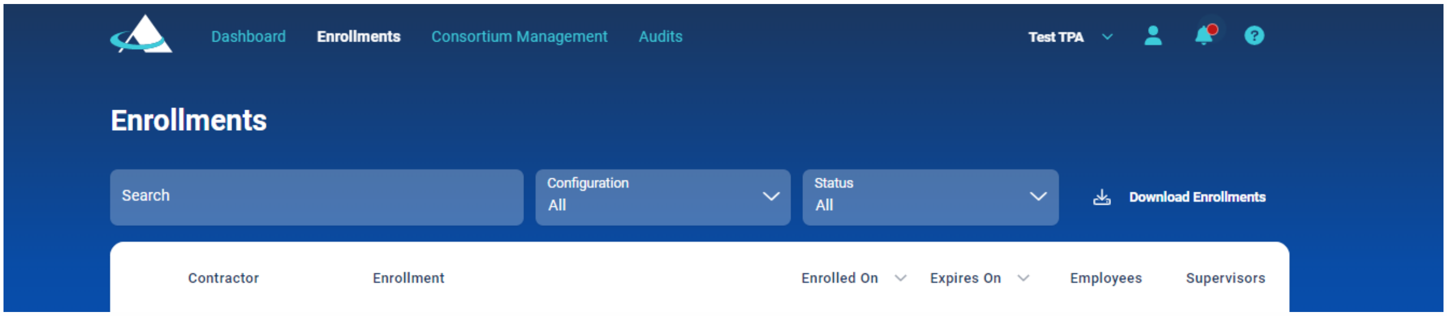
The built-in Chat feature is a quick and convenient way to Chat with TPS Alert's Customer Excellence Team, review Frequently Asked Questions, or review articles in the How-To area.

Dashboard



- The initial landing page, or Dashboard, of TPS Alert, contains compliance graphs, any open audits, unverified roster checks and your company's contact information.

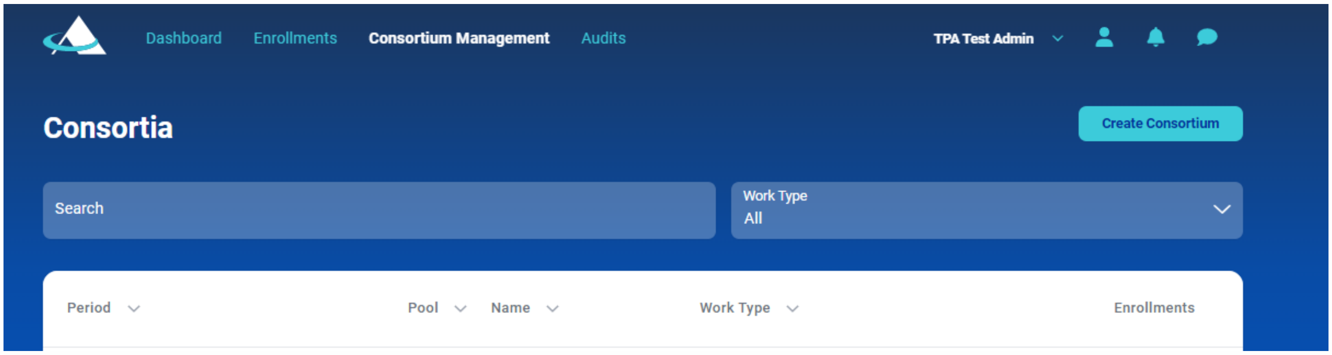
Enrollments



- The Enrollments menu item displays all contractors including their company information and statuses. Use the search field and filters to quickly narrow your search.
    - ***Tip:*** If you do not see Contractors that you should have access to, they will have to log into the new TPS Alert, set you as their TPA and grant all needed access.
- Select any contractor to view specific information about them including any action items, company information, program details, PHMSA management (if applicable), roster and statistical data.
    - Work within these areas to update action items, manage employee rosters and add statistical data.
    - ***Tip:*** For any action items that require a signed addendum or policies for which you do not have permission to, you will need to notify the Contractor so they can sign the appropriate paperwork within the new TPS Alert.

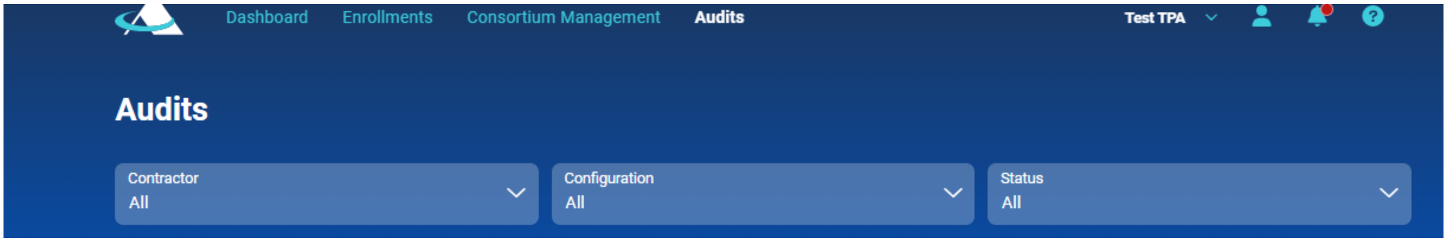
- *__Tip__*: If you are adding employees to a Contractor's roster and the first/last name is entered incorrectly, please contact TEAM via the Chat function. To maintain data integrity, TEAM will be glad to correct this information for you.
- *__Tip__*: For additional information about adding employees individually or via our upload feature, use the available articles in our How-To area within our Chat feature.

__Consortium Management__



- To view and manage any consortium, select the Consortium Management menu item.
  - Use the Create Consortium button to add a new consortium.
  - For existing Consortia data, click on the pencil icon to view the summary and then select View Reports to view the Testing Results for the Consortium.

__Audits__



- The Audits menu option displays any Roster Audits or any Statistical Data Audits for your clients.
  - Use the Contact Auditing button to send an email to our Auditing team. This will create a confirmation email with a ticket number. The Auditing team will be in contact with you to resolve any issues and/or answer any questions.
  - For Roster Audits, select the Forms (clipboard) icon to view any requested forms. Any audit that is closed as satisfactory will not allow you to upload documents.
  - For Statistical audits, select the Audit Feedback (clipboard icon) – select this icon to add and/or view explanations for the audit. Any explanations create a ticket that will be reviewed by our auditing team.