

HOW-TO: COMPLETE AN ELIGIBILITY, ANNUAL, OR RENEWAL

FOR: Applicants (Primary Contacts and Organizational Directors)

DESCRIPTION: The process for completing an Eligibility Application, Annual Report, or Renewal Report. All functionality available within these applications are available within Compliance Applications.

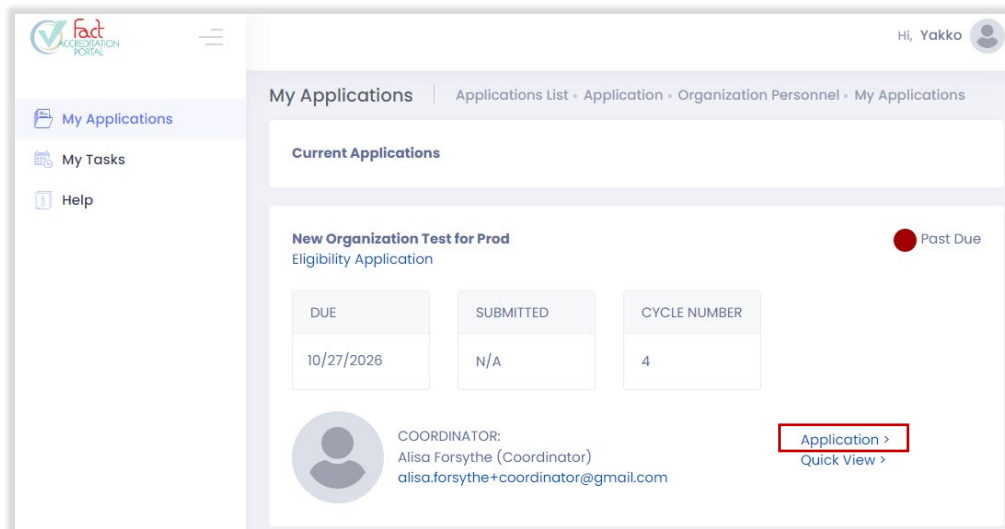
DEFINITIONS: NA

PREREQUISITES:

- [How-To: Navigate the Portal \(Applicant\)](#), IT.GDE.8.004
- [How-To: Navigate the Application \(Applicant\)](#), IT.GDE.8.005
- [How-To: Respond to an RFI](#), IT.GDE.8.023
- [How-To: Submit a Compliance Application](#), IT.GDE.8.008

PROCESS:

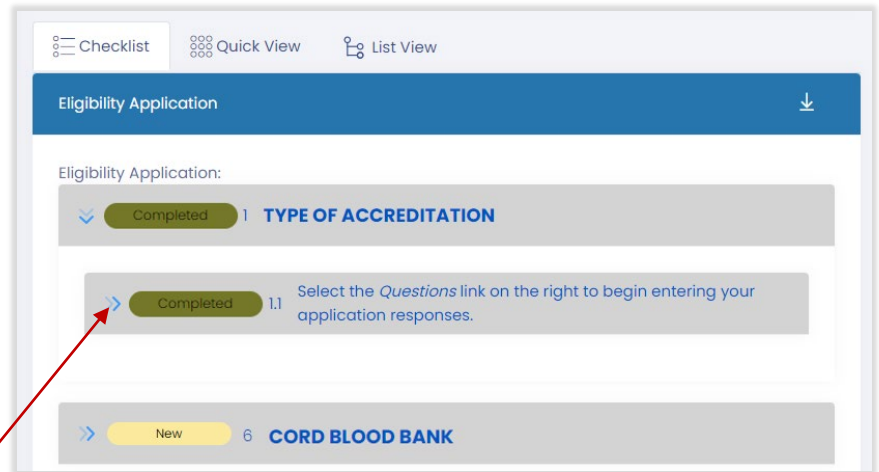
1. From the *My Applications* homepage, select **Application** on the application tile.



2. The *Site Checklist* page displays.

3. The checklists are developed using logic to enable or disable questions based on the responses provided, therefore, it is recommended to complete the sections from top to bottom. For example:

a. In this example, the organization indicates they perform Cord Blood Bank processes only. After responding to all the questions in Part 1 of the *Eligibility Application*, the site checklist adapts to the responses, and filters out sections that are not applicable.



b. Part 1.1 is now complete, and the status icon changes to dark green.
 c. Parts 2, 3, 4, and 5 do not display in the application.

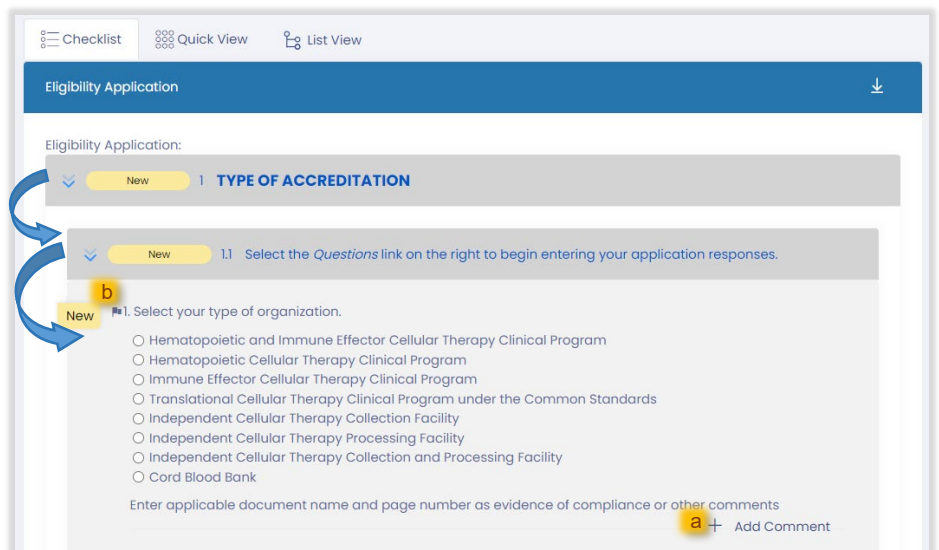
4. Select a section header to view the subsections within. Continue expanding to the lowest level until all questions display.

a. Use *Question Level Comments* to add evidence and document how your program demonstrates compliance to the question by selecting **+Add Comment**.

Example: refer to HCT Administration Policy, HCT.1.001, page 4, steps 6.3-6.8.

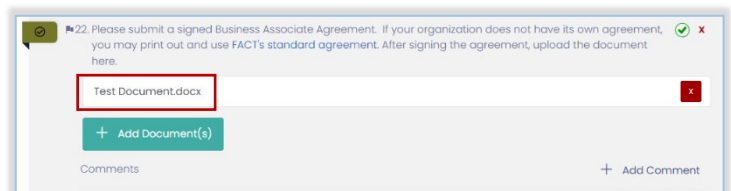
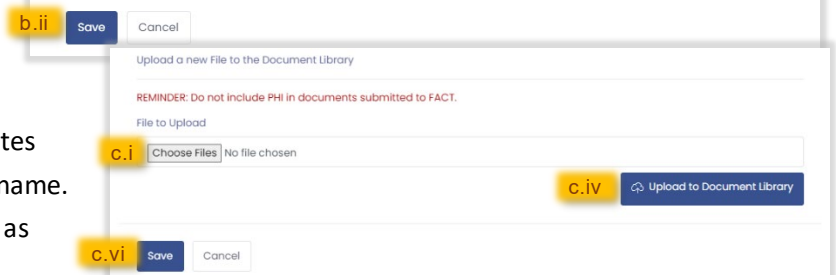
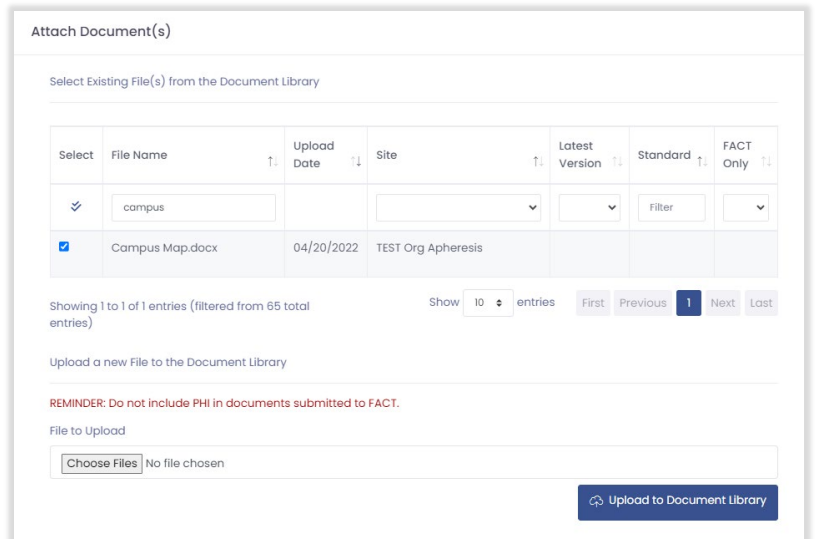
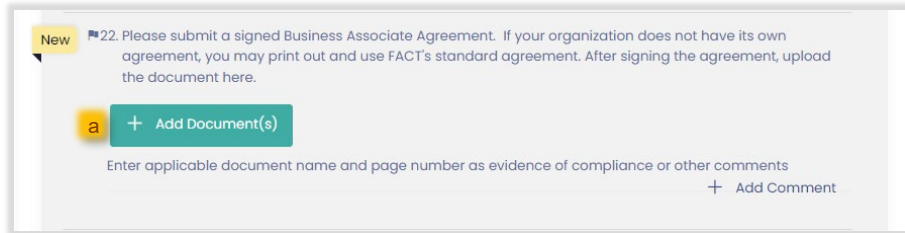
Comments are visible to FACT Staff during the review process.

b. Use *Question Level Flagging* to identify questions for review later by selecting the flag icon. All flags must be cleared to submit the application.



Document Uploads

5. For questions that require a document response, a document must be selected to complete the question.
 - a. Select the **+ Add Document(s)** button.
 - b. To select an existing file from the document library:
 - i. Select the Document Name to link the existing file to the question. The selected document's row is highlighted.
 - ii. Select **Save**.
 - c. To upload a new document:
 - i. Select **Choose Files**. Select the file or files to add to the library.
 - ii. Select **Open**.
 - iii. The File Name field automatically populates with the existing file name. Modify the file name as needed to reflect the document's content.
 - iv. Select **Upload to Document Library** to begin the upload process.
 - v. The file is automatically selected, and the row is highlighted.
 - vi. Select **Save**.
 - vii. The document name displays below the original question text and is hyperlinked to the document within the document library.



Submitting the Application or Report

6. When all questions within the application are complete, the *Review Director(s) and Send for Approval* button displays.
 - a. Select **Review Director(s) and Send for Approval**.



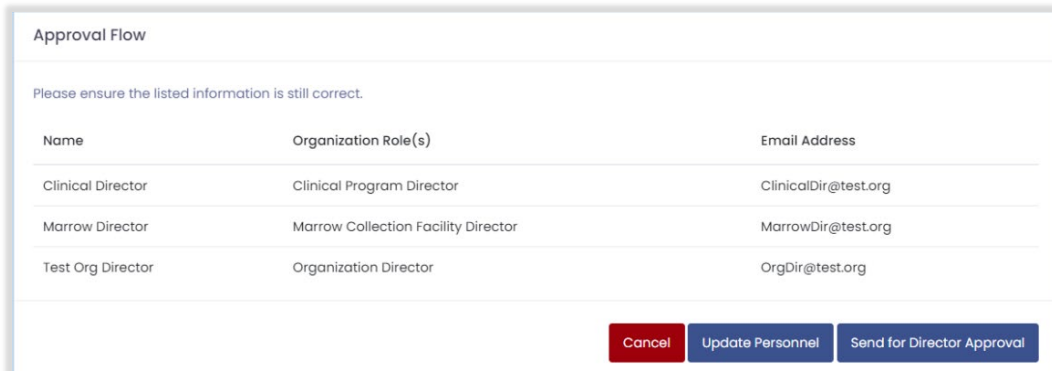
Application

FACT Demonstration Bone Marrow and Stem Cell Transplantation Program - TRAINING ORG
Eligibility Application , 2.0 In Progress

SUBMITTED	DUE	ACCRED. DATE	ACCRED. EXP.	
N/A	07/10/2022	N/A	N/A	Alisa Forsythe (Coordinator) alisa.forsythe+coordinator@gmail.com

Review Director(s) and Send for Approval

- b. An *Approval Flow* window displays to review the Director(s) information.
 - c. Review the personnel listed and if an update is required select **Update Personnel**. If updates are not required, proceed to the next step.



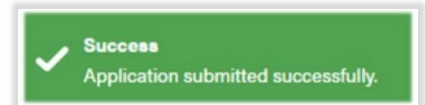
Approval Flow

Please ensure the listed information is still correct.

Name	Organization Role(s)	Email Address
Clinical Director	Clinical Program Director	ClinicalDir@test.org
Marrow Director	Marrow Collection Facility Director	MarrowDir@test.org
Test Org Director	Organization Director	OrgDir@test.org

Cancel Update Personnel Send for Director Approval

- d. Select **Send for Director Approval**.
 - e. An automated email is sent to the director of each listed facility.
 - f. Each director must use their unique link provided in the email to approve the application.
 - g. Each director must select **Approve** within the portal.
 - h. The *Application Approval Status* table displays the approval status for each director.
Note: All facility directors must approve the application. The Organization Director approves after the facility directors.
 - i. The application is submitted to FACT.
7. Once the application is submitted successfully, a green confirmation notification displays at the top right corner of the screen and a confirmation email is sent.



After Submission

8. FACT reviews the information provided in the application or report.
9. If there are questions or missing information, a Request for Information (RFI) is created within the application and returned to the organization for response.



10. When an RFI is issued, an automated email is sent to the organization. For more information on this process, refer to the [How-To: Respond to an RFI](#).

11. If submitting an:

a. Eligibility Application:

- i. FACT reviews the RFI Responses and determines if responses are sufficient.
- ii. After it is determined the program is eligible to proceed with FACT accreditation, an email notification is sent indicating the Eligibility Application is approved.
- iii. The assigned Accreditation Coordinator generates the Compliance Application and sends an email notifying the organization that the Organization Director needs to review and approve the accreditation goal and sites to be inspected.
- iv. If the Organization Director requests revisions to the accreditation goal or sites to be inspected, the comments are sent to FACT and an RFI is created to address the comments.
- v. Once the accreditation goal and inspection sites are approved by the Organization Director, the Compliance Application becomes available for completion. For more information on the Compliance Application process, refer to How-To Guide on [How-To: Submit a Compliance Application](#).

b. Annual Report:

- i. FACT reviews responses to RFIs and any required Tasks, and determines if responses are sufficient.
- ii. After all responses to RFIs and applicable Tasks are sufficient, an email notification is sent indicating that the FACT Annual Report is approved.
- iii. If additional documentation is required at the time of the Renewal Report, a Task will be created and the organization notified.

c. Renewal Report:

- i. FACT reviews responses to RFIs and any required Tasks, and determines if responses are sufficient.
- ii. After all responses to RFIs and applicable Tasks are sufficient, an email notification is sent indicating that the Renewal Report is approved.
- iii. The assigned Accreditation Coordinator generates the Compliance Application and sends an email notifying the organization that the Organization Director needs to review and approve the accreditation goal and sites to be inspected.
- iv. If the Organization Director requests revisions to the accreditation goal or sites to be inspected, the comments are sent to FACT and an RFI is created to address the comments.
- v. Once the accreditation goal and inspection sites are approved by the Organization Director, the Compliance Application becomes available for completion. For more information on the Compliance Application process, refer to How-To Guide on [How-To: Submit a Compliance Application](#).