MyTDEC Forms Application: Consultants – How to Review a Form

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Version 1.1
Consultants – How to Review a Form

Overview

The following document will provide step-by-step guidance on how to successfully review a form as a consultant on MyTDEC Forms application. With MyTDEC Forms, submissions may be shared with other users to support collaborative data entry and review, such as a consultant. Consultants can initiate submissions but cannot sign and submit them unless they are designated as an Electronic Signatory in MyTDEC Forms. Consultants may also collaborate on submissions if the submission is shared with them. The steps listed below will explore all the possible actions consultants can take.

Step-by-Step Guide

**Step 1- Login to your Account**

1.1 Selecting Sign In

Begin by navigating to [https://forms.tdec.tn.gov/](https://forms.tdec.tn.gov/). Once you see the screen below, find and click on “Sign In” from the list of options at the top of the page.

![Figure 1 Login Page](image)
Step 1 – Login to your Account

1.2 Sign In with Credentials

After selecting sign in, please fill in the “User ID” and “Password” fields. If you forgot your password, please select “Forgot Password” and follow the subsequent steps to reset that information. Once you have entered your User ID and Password into the appropriate fields, please select “OK” to complete the log in process.

![Sign In Window](image-url)
Step 2 – Consultant Actions

2.1 List of Actions Available for Consultants

The following are a list of actions that a consultant may take when using MyTDEC Forms. The subsequent steps will outline how to accomplish each of these actions.

1. Begin a submission
2. View a submission summary
3. Edit a draft submission
4. Revise submitted form
5. View and address correction requests
6. Print a submission
7. View users with access to submission
Step 3 – Beginning a Form

3.1 Form Finder Options

As demonstrated in the image below, there are 2 easy ways to find the form you need. Click on either the “Finder” link located in the header, or the “Form Finder” button located at the bottom of the home page. Both will take you to a search tool where you can enter the name of the form or permit application you are looking for. If you do not know the exact name of the form or application, enter specific key words in the search bar to find the form you need. The results will appear in a list below the search tool under the Recommended Forms heading. Click on the title of the form or application you would like to submit.

Figure 3 Form Finder Options

Figure 4 Form Search Tool Bar
Step 3 – Beginning a Form

3.2 Alternative Search by Organization

You can also return to the home page and find a form by selecting an organization. Below the Organizations header, click “Select an Organization” from the drop-down menu. You will be linked to a page that lists all forms associated with that organization. Scroll through the list to find the form you need.

Figure 5 Selecting Organizations from the Drop-Down Menu
### Step 3 – Beginning a Form

#### 3.3 Select Begin Form Entry

After selecting the form that you need, you will be taken to a form instructions page. Scroll to the bottom and select **“Begin Form Entry”**. As mentioned above, since a consultant cannot sign unless they are an Electronic Signatory, be sure to enter the appropriate contact information for those parties who will sign off on a submission after all relevant information has been entered. This will notify the Electronic Signatory when the submission is ready for review, signature, and submittal.

![Figure 6 Selecting Begin Form Entry from Form Instructions Page](image-url)
Step 4 – View a Submission Summary

4.1 Accessing Submission History Dashboard

To find your forms, simply click on the “History” tab from your dashboard. You will be redirected to your Submission History dashboard. Within the History dashboard, you will see a historical list of all of your form submissions that were created and/or submitted through the portal. You will also see forms that have been shared with you by an Electronic Signatory for you to complete or revise. You can view the status of any submission, submit and/or delete draft submissions, and revise and/or view previously submitted forms. You can also print the list of submissions, if needed.

Figure 7 Selecting your History

Figure 8 Form History Dashboard
Step 4 – View Submission Summary

4.2 Select Magnifying Glass Icon

To view a submission, select the magnifying glass icon at the far right of the screen. Once you select this button, you will be taken to the submission summary, as shown in figure 10.

Figure 9 Finding Magnifying Glass

Figure 10 Submission Overview Page
Step 5 – Edit a Draft Submission

As noted above, within the Submission History page, you will be able to see all forms that you have created, submitted, collaborated on, among other actions. To edit draft submissions, find the forms that have Draft status from the Status column, as highlighted below. Then, select the pencil icon to begin editing the draft.

Figure 11 Editing Draft Submission
**Step 6 – Revise a Submitted Form**

Similarly, if a form is still in submission status, it can be revised. From the Submission History page, select the magnifying glass icon next to the form with the status Submitted, as shown in figure 12. You will be redirected to the Submission Overview page, where you will be able to select “Revise Submission” as shown in figure 13.

![Figure 12 Submitted Status of the Form](image1)

![Figure 13 Selecting Revise Submission](image2)
**Step 7 – View and address correction requests**

**7.1 Email Confirmation**

When a form is going through the review process, TDEC staff can create correction requests if they find an error on the form. As the submitter, you will receive an email letting you know that a correction has been requested. An example of the email is shown below in figure 14. Follow the link provided in the email to access MyTDEC Forms.

![Image of email notification for correction request]

**Figure 14 Correction Request Notification Email**
Step 7 – View and address correction requests

7.2 Ways to Address Correction Request

Once back at the Submission Overview page, you will notice that there are 3 orange buttons, “View Form”, “Revise Submission” and “Action Required”. All three of these buttons will allow you to make the requested corrections. Regardless of which button you select, you will have to revise the submission, and confirm that you want to revise, as shown in figure 16. Select “OK” to continue.

Figure 15 Ways to Revise and Correct Requests

forms.tdec.tn.gov says

Are you sure you want to revise and edit this form? Please note that this form will not receive further review until you have completed the submission process for this revised version of the form. If you do not submit this revised version, it will not be processed and will eventually be deleted from the system.

Figure 16 Confirming Revise and Edit Action
Step 7 – View and address correction requests

7.3 Making Changes and Resubmitting

Next the form will be open for editing, and the correction request will appear next to the erroneous section, as shown below in figure 17. The field that needs to be changed will be highlighted in orange. Enter the new, correct information, then scroll down through all other sections. **You will be asked to re-assign signatures and re-submit at the end.**

![Figure 17 Addressing a Correction Request](image-url)
Step 9 – Print a Submission

If you would like to print a submission, first locate the form on the Submission Dashboard. Select the magnifying glass icon, as shown in Figure 18. Now from the Submission Overview, select either “Print”, “Download/Export”, or “View Confirmation” based on the action you wish to perform.

![Figure 18 Selecting Magnifying Glass Icon to View Submission](image)

![Figure 19 Print, Download Options](image)
**Step 10 – View users with access to submission**

To view which parties have access to the submission, start on the **Submission Overview** page. Scroll down to the end of the overview, and the list of those with access will be at the bottom right, as highlighted below.

![Parties with Access to a Submission](image-url)

*Figure 20 Parties with Access to a Submission*