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## **Provider Portal User Guide**



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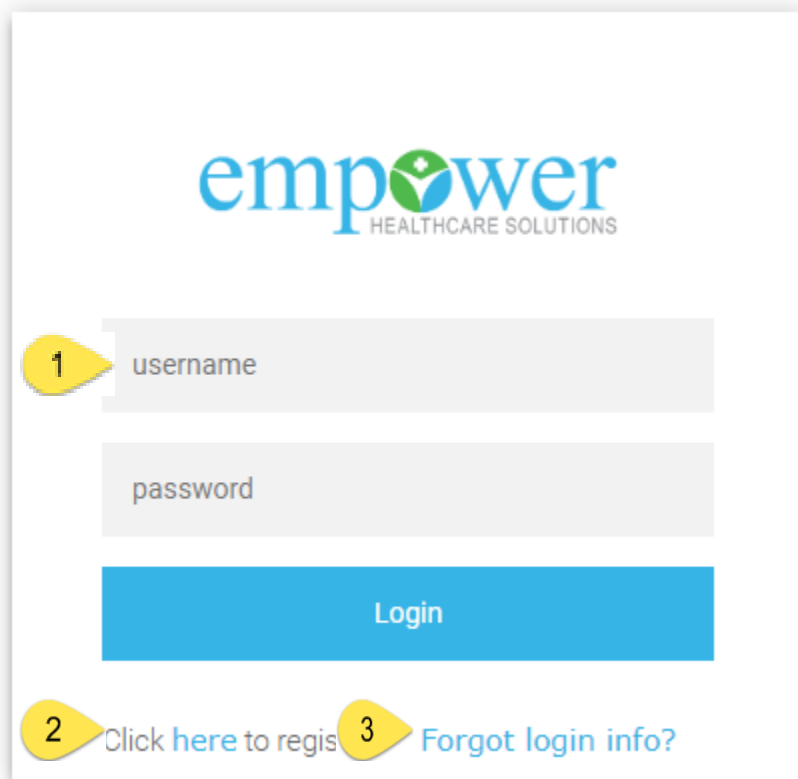
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# 1. Login Page



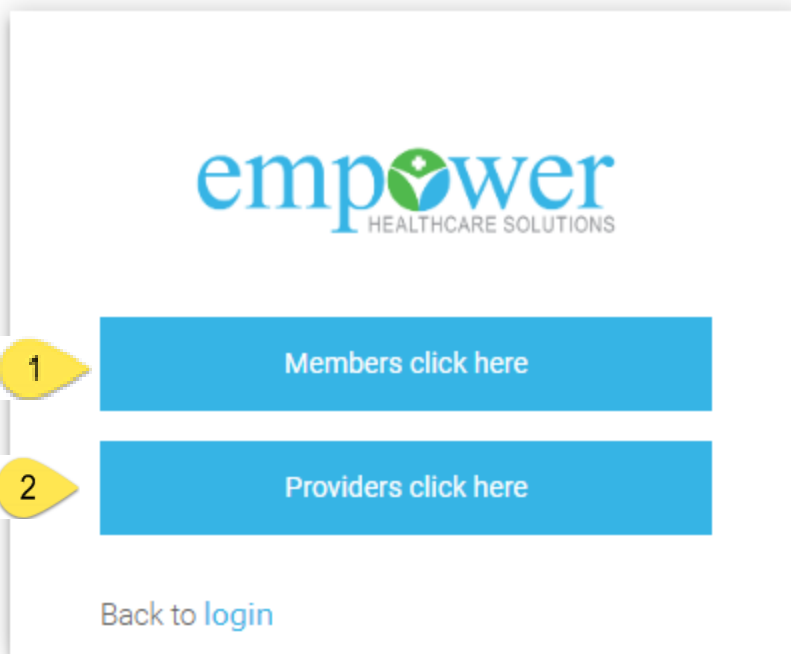
- 1 Username and password text boxes
- 2 "Click here to register" link will take you to available self-registration options (see the [Click here to register section](#) of this user guide for more information).
- 3 "Forgot login info?" link will take you to forgot username and/or password self service features (see the [Forgot login info section](#) of this user guide for more information).

### **Please Note:**

If you have not done so already (or you require additional access) follow the process within the ["Click here to register link"](#) to create a portal user account request.



## 1.1 "Click here to register" link



- 1 Select this button to complete the provider portal self-registration process.
- 2 "Back to login" link will return you to the login page where you will find the username and password text boxes.

### **Please Note:**

If you do not already have a user account then you can self-register through the "Providers click here" button.

After selecting the button you will be directed to the portals terms and conditions.

To continue with the self-registration process you will need to agree with the statement supplied.



### 1.1.1 "Providers click here" button (Provider Self-Registration) "Provider Information" page

## Provider Information

To register for an account please fill out the required information.

\*Required Fields

### How may we contact you?

\* Last Name  ?

\* First Name  ?

\* Phone  ?

\* Email  ?

\* Tax ID Number

### Enter Your Registration Code

\* Business Unit ID

Next >    Cancel

The fields above will need to be completed with your information to locate your provider office record in the portal. Once all required fields (noted with a red \*) are completed, select the "Next" button to continue with the self-registration process.

If you need assistance determining your "Business Unit ID" please contact your provider relations specialist



## "User Information" page

### User Information

Complete the below fields to establish a user account that will allow you to access the portal  
\*Required Fields

#### Enter User Information

\* First Name  ?

\* Last Name  ?

Middle Initial  ?

\* Username  ?

\* Password  ?

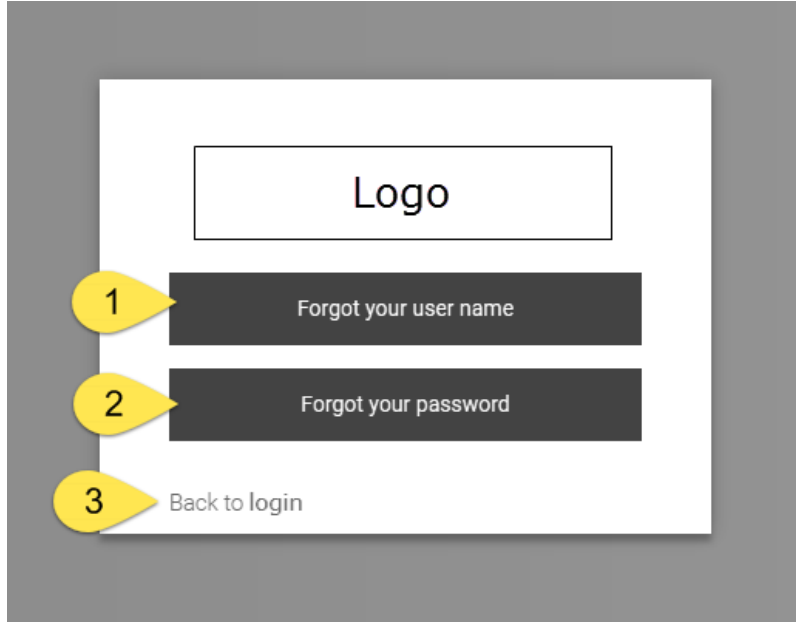
\* Confirm Password  ?

Once the portal has located your provider office record you will be directed to the page above. Please complete all required fields to create a portal user account. Once all required fields (noted with a red \*) are completed select the "Submit" button to complete the self-registration process.

If your plan requires manual approval processing your registration request will initially pend. Once approved you will receive confirmation via email notification.



## 1.2 "Forgot login info" link

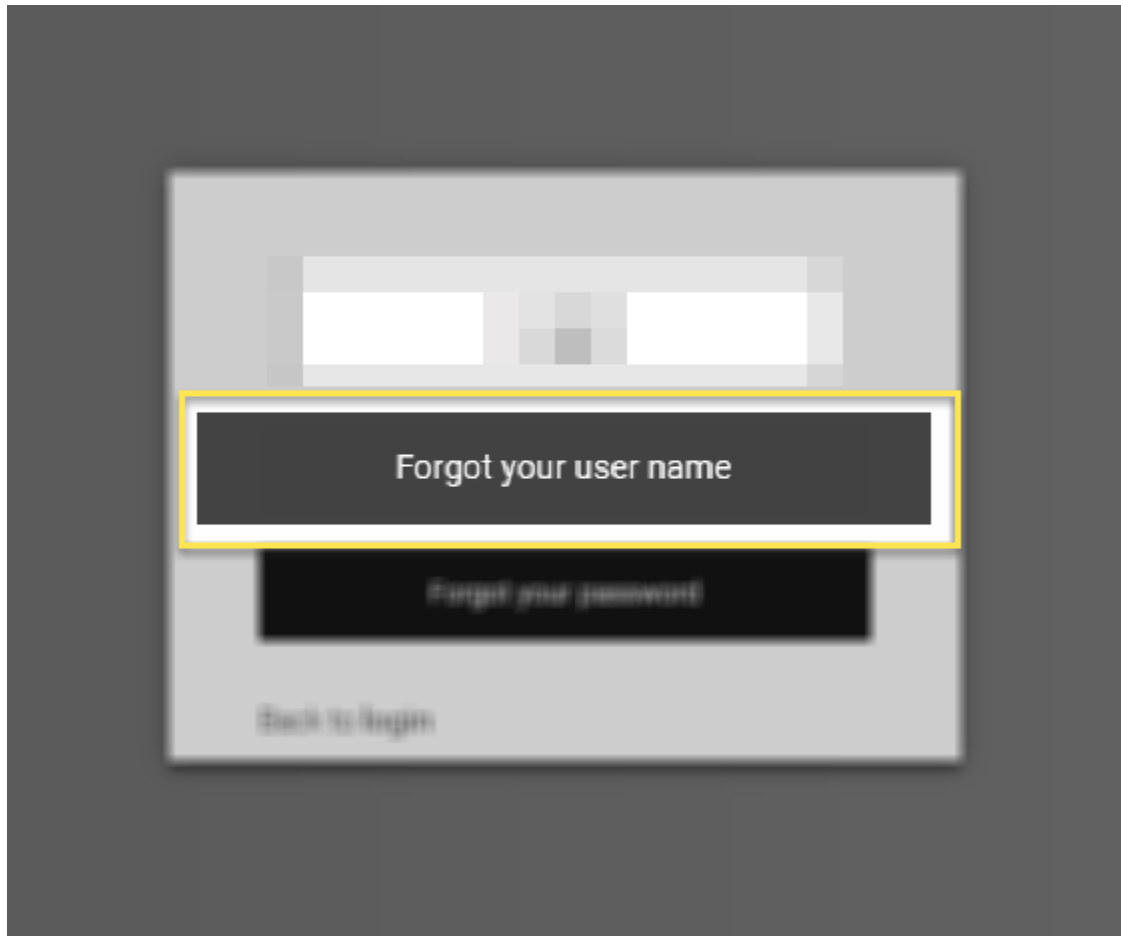


- 1 "Forgot your user name" button will take you through the process of retrieving your username.
- 2 "Forgot your password" button will take you through the process of retrieving a temporary password.
- 3 "Back to login" link will return you to the login page where you will find the username and password text boxes.





## 1.2.1 Forgot your username



If you forgot or misplaced your username you can submit a request through the "Forgot your user name" button (identified on the screenshot on the left). The portal will send an email with your username to the email address you currently have established with your portal account. After selecting the "Forgot your user name" button you will be directed to the "User Name Request" page.



## "User Name Request" page

Logo

### User Name Request

\*Required Fields

**User Name Request**

\***Email**

\***First Name**  ?

\***Last Name**  ?

The portal will now need to locate your portal account by checking on three elements.

1. Email associated with your user account
2. First Name associated with your user account
3. Last Name associated with your user account

Once all fields are completed select the "Next" button to continue with the forgot your username process.

### **Please Note:**

You will need to ensure all fields match the current information associated with your portal user account.



## "Security questions to retrieve username" page

Logo

### Security questions to retrieve username

\*Required Fields

**Identity Verification**

What is your mother's maiden name?

\***Password Answer 1**

Next >Cancel

After the portal locates your account (by searching the information on the previous page of this user guide) you will be required to answer the password question(s) you setup with your portal user account. Once you complete the Password Answer field(s) select the "Next" button.



## "User Name Request" page

Logo

### User Name Request

User Name for

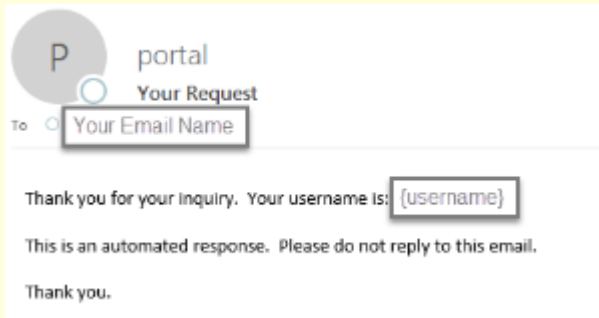
Send UserNameCancel

After selecting the "Next" button you will be navigated to the User Name Request page. To complete your request and have the system send your user name via email select the "Send Username" button.

### **Please Note:**

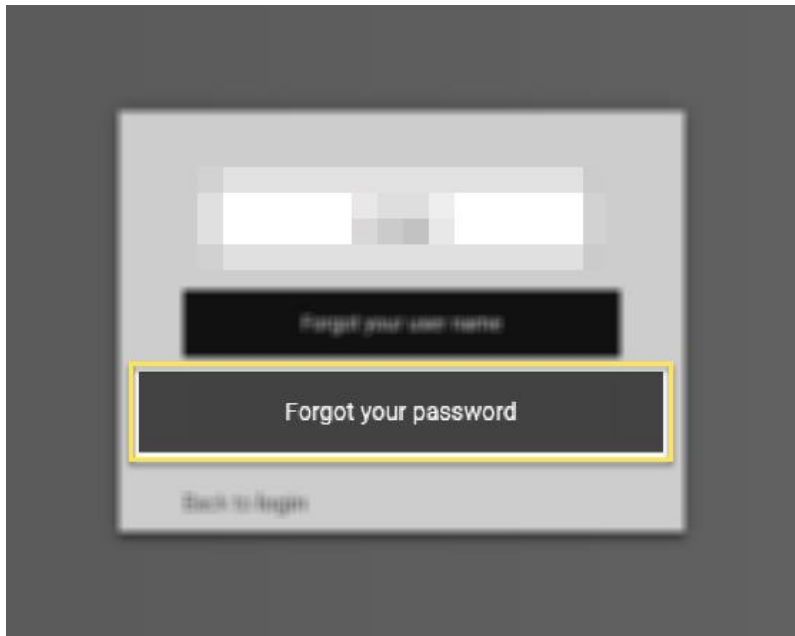
The "Send Username" button will re-direct you to the Login page. You will now want to check the email you have setup with this portal user account.

This is an example of the email you will receive.





## 1.2.2 Forgot your password



If you forgot your password you can request a temporary password through the Forgot your password button (identified on the screenshot above). The portal will send an email with a temporary password to the email address you currently have established with your portal account. After selecting the Forgot your password button you will be directed to the "Request Password" page.



## "Request Password" page

Logo

### Request Password

\*Required Fields

**Password Request**

\*  
\*\* Username

\*  
\*\* First Name  ?

\*  
\*\* Last Name  ?

Next >Cancel

The portal will now need to locate your portal account by checking on three elements. Once all fields are completed select the "Next" button to continue with the forgot your password process.

### **Please Note:**

You will need to know your username in order to complete a request for a temporary password. You will also need to ensure all fields above match the current information on your portal user account information.



## "Security questions to retrieve password" page

Logo

### Security questions to retrieve password

\*Required Fields

**Identity Verification**

What is your mother's maiden name?

\*  
\*\* Password Answer 1

Next > Cancel

After the system locates your account (by searching the information on the previous page of this user guide) you will be required to answer the password question(s) you selected when you initially setup your user account. Once you complete the Password Answer field(s) select the "Next" button.



## "Request Password Response" page

Logo

### Request Password Response

Password Request for

Send Password

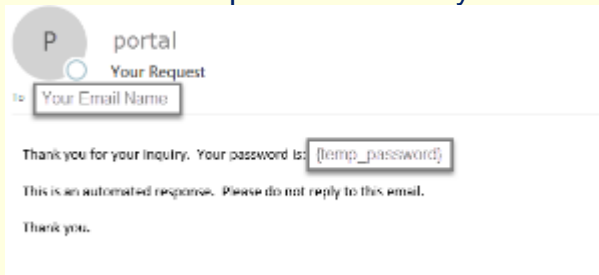
Cancel

After selecting the "Next" button you will be navigated to the page below. To complete the request and have the website send a temporary password select the "Send Password" button.

### Please Note:

The "Send Password" button will re-direct you to the Log In page. You will now want to check the email account you have setup with the user name. Please see below for an example of the email you will receive.

This is an example of the email you will receive.







## "Password Expired" page

Logo

### Password Expired

This page indicates that your password has expired. Please enter information as indicated to get a new password.

Enter Your New Password

**Password**  ?

**Confirm Password**  ?


SubmitCancel

Upon your first log in after using the temporary password you will be directed to a "Password Expired" page. The password you received via email has now expired and the website is requiring you to setup a new password.

Enter your new password in the "Password" and "Confirm Password" text boxes and select the "Submit" button.

After selecting the "Submit" button you will be directed to your home page and have now completed the Forgot your password process.

### Please Note:

Password requirements will be identified in the  icon to the right of the text box. Click or hover your mouse arrow over the icon and a text box will appear identifying the requirements.



## 2. Getting Around

### 2.1 Menu Bar



The Menu Bar, located at the top of the page, is your main point of navigation throughout the portal.

#### 2.1.1 Menu Bar options

Below is a listing of Menu Bar options, as well as descriptions of what is available at each destination page.

Drop-Down	Feature	Description
N/A	Home	Select this menu bar option to return to your portal Home Page
Claims	Claim Status List	Go here to search and review the status of claims we have on file associated with your security rights
Claims	Remittance Advice Search	Go here to search and review Remittance Advice (Explanation of Payments) we have on file associated with your security rights
Patient	Member Eligibility Search	Go here to search the network for active and ineligible members. After selecting the Member name you can review the Member's detail page where you will be able to review: <ul style="list-style-type: none"> <li>The members current benefit information</li> <li>Status Indicators (suspension/disenrollment indicators and/or lock-in indicator)</li> <li>Primary Care Physician assignment (PCP)</li> <li>Contacts on file (to include Care Management team and lock-in locations if applicable)</li> <li>Other Coverage / Coordination of Benefits</li> </ul> Any Pending / Open Requests
Tools Resources	& Document List	Go here to search for available documents
Tools Resources	& Diagnosis List	Go here to search ICD9/ICD10 codes
Tools Resources	& Procedure List	Go here to search procedure codes
Tools Resources	& Provider List	Go here to review all provider records associated with your security rights
Office Administration	Request List	When available, go here to review any pended portal self-registration requests associated with your security rights
Office Administration	User List	When available, go here to administer portal user accounts for your office. Within the User List you can: <ul style="list-style-type: none"> <li>Search for current portal user accounts</li> </ul>



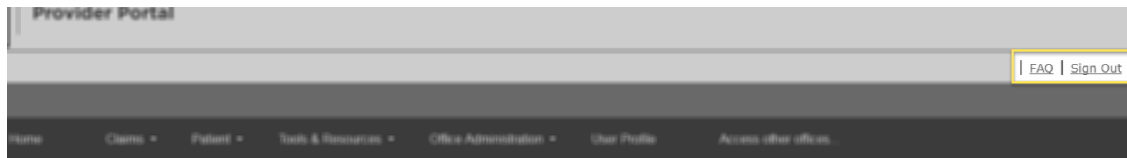
Drop-Down	Feature	Description
		<ul style="list-style-type: none"><li>• Reset a users password</li><li>• Unlock a users account</li><li>• Delete a users account</li></ul> Create a user account
N/A	User Profile	Go here to update information associated with this portal user account



## 2.2 Bread Crumbs

In Addition to your Menu Bar you will find a trail of links (or bread crumbs) just below the Menu Bar. This will supply you quick links back to a previous page you visited as you navigate further through the portal.

## 2.3 FAQ and Sign Out



Within all header content you will find quick links to view all available Frequently Asked Questions (FAQ) and a Sign Out link.

**Please Note:**

The "FAQ" link will open all available Frequently Asked Questions on the "View FAQ" page.

The "Sign Out" link will return you to the [Login page](#).



## 2.4 Home Page

Logo | Provider Portal

Welcome Office: [Redacted] | [FAQ](#) | [Sign Out](#)

Member Lock +

Home | Claims ▾ | Patient ▾ | Tools & Resources ▾ | Office Administration ▾ | User Profile | Access other offices

**Welcome**  
Welcome Message

**Plan Messages**  
» When available, this is an example of where a plan message from the Health Plan will appear.

Above is your home page. This is the page you will first navigate to upon every sign on.

### **Please Note:**

If at any time you would like to return to this page, simply select the "Home" option from your [Menu Bar](#).

### 2.4.1 Messages

**Plan Messages**  
» When available, this is an example of where a plan message from the Health Plan will appear.

**Plan News**  
» When available, this is an example of where health plan news from the Health Plan will appear.

» [Event Calendar](#)  
» [Related Documents](#)

Any messages/news we would like to relay to you will be found in the "Plan Messages" and "Plan News" sections (in-between the Welcome and My Health Tools / Resources sections of your home page).

### **Please Note:**

These sections will only populate when we have active messages/news to relay to you.



## 2.4.2 My Health Tools / Resources

» When available, this is an example of where health plan news from the Health Plan

### **My Health Tools / Resources**

Test Application Link

The Health Plan will include helpful links in this section

The My Health Tools / Resources section will include links we feel will be beneficial to the administration of your account. The available link will open in a new internet browser window (popup window)

**Please Note:**

These sections will only populate when we have active Tools / Resources to relay.



### 2.4.3 Contact

Test Application Link

The Health Plan will include helpful links in this section

## Contact

Contact Information

## Message Center

The Contact section on your Home page will identify customer service information should you need to contact us.



## 2.4.4 Message Center

### Contact Information

#### Message Center

From	Subject
[Redacted]	<a href="#"><u>Test Message 2</u></a>
[Redacted]	<a href="#"><u>Test Message 1</u></a>

The Message Center is the location in your portal where you can find any available secure messages.

**Please Note:**

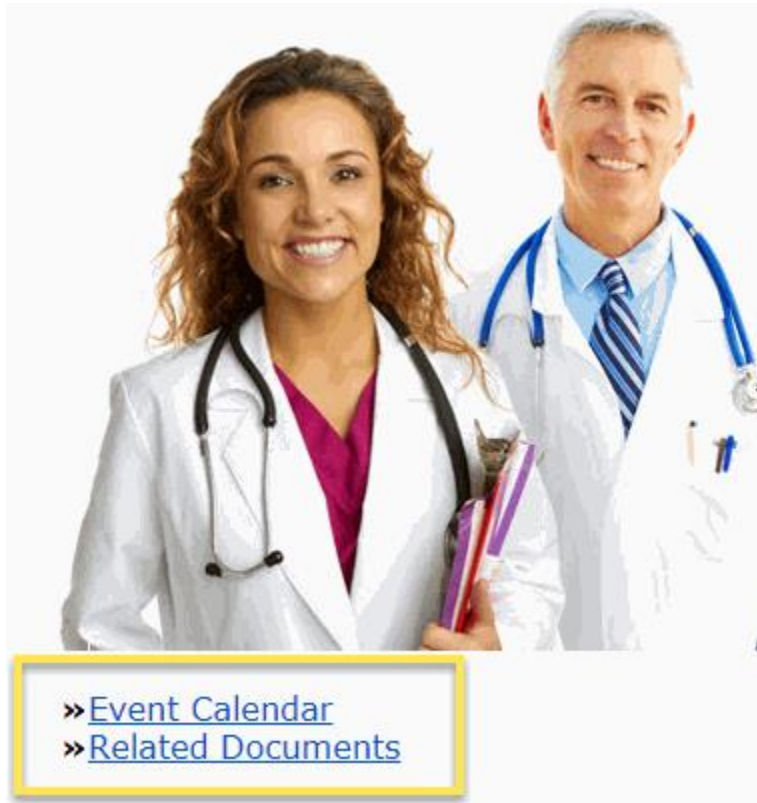
The "Message Center" section on your home page will always display your three most recent secure messages. Select the "Inbox" link from the Message Center header or through your Menu Bar to view all secure messages.

The "Subject" link will open the "View Message" page where you can view additional information for that secure message.





## 2.4.5 "Event Calendar" link



On the right side of the Home page you will find the "Event Calendar" link just below the image of two doctors.



### 2.4.5.1 "Event Calendar" page

**Event Calendar**  
page displays all events defined for your user type.

< Previous Month   **March, 2017**   Next Month >

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15 - New Event	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

When you select the "Event Calendar" link from your home page you will be directed to the "Event Calendar" page.  
The box for the day will have the title of the event. If you wish to see more detail on the event select the date (in the example above it is the "15").

**Please Note:**

All events we would like to make you aware of will appear in this calendar. In this user guide we will review the day highlighted more closely.



### 2.4.5.1.1 "Day Events" page

## Day Events

### Wednesday, March 15

This page displays the event detail for the day.

#### New Event

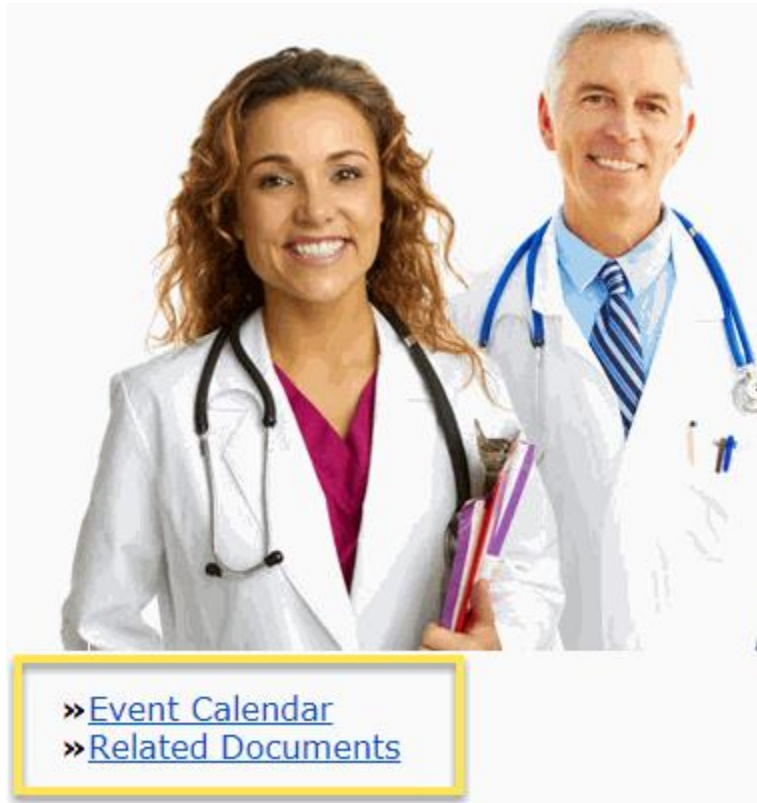
<b>Subject</b>	New Event
<b>Location</b>	Location ABC
<b>Organizer</b>	Health Plan
<b>Start Date</b>	03/15/2017
<b>End Date</b>	03/15/2017
<b>Description</b>	Come join us for this event



After selecting the date you will be directed to the "Day Events" page where you will find more specifics on the event (location, organizer, start date, end date, and a short description of the event).



## 2.4.6 "Related Documents" link



On the right side of the Home page you will find the "Related Documents" link just below the image of two doctors.



### 2.4.6.1 "Document List" page

## Document List

This page allows you to access the documents related to your user type. You can sort the list by document name

**Search**

**Title**  ?

**Description**  ?

**File Detail Category**  ▼

When you select the "Related Documents" link from your home page you will be directed to the "Document List" page.

**Please Note:**

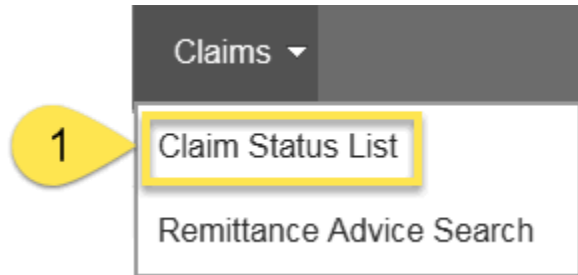
You can also access the "Document List" page through your Menu Bar. [Click here](#) to review the Document List page functionality in this user guide.



## 3. Claims Drop-down

### 3.1 Claim Status List feature

This feature will allow you to search/view submitted claims associated with your portal user account security rights.



#### Step 1

From the Claims drop-down of the menu bar, select the Claim Status List option



### 3.1.1 Claim Status List page

#### 3.1.1.1 Claims Status List page - Search section

**Claim Status List**

This page displays a list of claims submitted for a specific patient/subscriber according to the search criteria. Click on the Claim EOB link to view benefit information for a claim. Click on the member name to view member detail information. Click on the pro a remittance advice search, or Submit a New Claim to begin a claim submission process. Click Search Again to initiate a new se

**2** Search

**Patient/Subscriber Information** **1**

First Name  ?

Last Name  ?

Health Plan ID#  ? (123456)

Medicaid ID#

DOB   ? (mm/dd/yyyy)

Gender

**Claim Information** **2**

Servicing Provider Name

#### Step 2

Complete a search for claims by:

- 1** Patient Information
- 2** Claim Information

#### Please Note:

This page does **not** pre-populate all available claims. You will need to input search criteria before you will be returned Results.



### 3.1.1.2 "Claim Status List" page - Results section

Results							
Claim #	Claim type	Member	Health Plan ID#	Medicaid ID#	Svc date	Provider	
<a href="#">View EOB</a>	Professional				05/19/2017		

Data from your search request will produce at the bottom of the page in the "Results" section

**Please Note:**

The "[Download File](#)" link found above the Results section will export the content listed to an excel spreadsheet.

### "Claim Status List" page - Results section - View EOB link

Results							
Claim #	Claim type	Member	Health Plan ID#	Medicaid ID#	Svc date	Provider	
<a href="#">View EOB</a>	Professional				05/19/2017		

1

**Step 3**

When available, select the "[View EOB](#)" link from your claims results section to open a copy of the Explanation of Benefits associated with that claim.

**Please Note:**

Explanation of Benefits (EOB) are a rendered version of the EOB with appropriate content displaying on the rendered form. The EOB that displays is not a PDF of what was mailed.





### 3.1.1.2.1 "EOB Detail" page

**EOB Detail**

This page displays EOB detail for the selected claim.

**Information** Printer Friendly Format

<b>Payer</b>	<b>Payee</b>
<b>Name:</b> [REDACTED]	<b>Member:</b> [REDACTED]
<b>Address:</b> [REDACTED]	<b>Health Plan ID#:</b> [REDACTED]
<b>Address 2:</b> [REDACTED]	<b>Medicaid ID#:</b> [REDACTED]
<b>City:</b> [REDACTED]	<b>Group Or Policy No.:</b> [REDACTED]
<b>State:</b> [REDACTED]	<b>Claim #:</b> [REDACTED]
<b>Zip Code:</b> [REDACTED]	<b>Svc date:</b> [REDACTED]
<b>Contact Name:</b> [REDACTED]	<b>Provider:</b> [REDACTED]
<b>Contact Phone:</b> [REDACTED]	

**Details**

Svc date	Procedure	Diagnosis Code 1	Quantity	Line Item Control No.	Charge Amt	Allowed Amount	Non Covered Charge Amt	Deductible	Copay	CoInsurance	3rd Party	Payment	Member Payment Amt	Remarks
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

After selecting the "View EOB" link you will be directed to the "EOB Detail" page. Payer and Payee information is located near the top with service line details found at the bottom.

#### Please Note:

The "Printer Friendly Format" link found above the Payer/Payee Information section will open a new browser window with the content on the page in a printer friendly version.

### "Claim Status List" page - Results section - Claim # link

**Results** Download File

Claim #	Claim type	Member	Health Plan ID#	Medicaid ID#	Svc date	Provider	Claim status	Charge amt	Patient resp	Payment
<a href="#">3</a>	Professional	[REDACTED]	[REDACTED]	[REDACTED]	05/19/2017	[REDACTED]	Finalized/Payment	[REDACTED]	[REDACTED]	[REDACTED]

1

#### Step 3

Select the "Claim #" link from your claims results section to open additional detail for that claim.



### 3.1.1.2.2 "Claim Status Detail" page

#### Claim Status Detail

This page displays the selected claim's detail.

##### Patient Information

[Printer Friendly Format](#) [View EOB](#) [Reconsider Claim](#)

**Member** [REDACTED]  
**Health Plan ID#** [REDACTED]  
**DOB** [REDACTED]  
**Gender** [REDACTED]

##### Servicing Provider Information

**Provider** [REDACTED]  
**Provider No** [REDACTED]  
**Provider TIN** [REDACTED]  
**Provider NPI** [REDACTED]

##### Claim Information

**Claim #** [REDACTED]  
**Claim type** Professional

After selecting the "Claim #" link you will be directed to the "Claims Status Detail" page. On this page you will find additional detail regarding

- Patient Information
- Servicing Provider Information
- Claim Information
- Payment Information
- Service Line Information



## "Claim Status Detail" page - Patient Information section

**Patient Information** [Printer Friendly Format](#) [View EOB](#) [Reconsider Claim](#)

**Member** [Redacted]

**Health Plan ID#** [Redacted]

**DOB** [Redacted]

**Gender** [Redacted]

The Patient Information section will supply high level content for the member this claim was submitted for. You will find the members Name, Health Plan / Medicaid ID#, DOB, and Gender.

### **Please Note:**

The "Printer Friendly Format" link will open a new browser window with the content on the page in a printer friendly version.  
 When available, the "View EOB" link will open the EOB Detail page for this claim.  
 When available, the "Reconsider Claim" link will allow you to submit a request a claim appeal for this claim.

## "Claim Status Detail" page - Servicing Provider Information section

**Servicing Provider Information**

**Provider** [Redacted]

**Provider No** [Redacted]

**Provider TIN** [Redacted]

**Provider NPI** [Redacted]

The Servicing Provider Information section will supply high level content for the servicing provider this claim was submitted with. You will find the providers Name, Provider # (payer assigned #), Provider TIN, and Provider NPI.



## "Claim Status Detail" page - Claim Information section

Claim Information	
Claim #	[Redacted]
Claim type	[Redacted]
Claim status	[Redacted]
Svc date	[Redacted]
Claim Status Code	[Redacted]
Charge amt	[Redacted]
Patient resp	[Redacted]
Payment	[Redacted]
Claim Received Date	[Redacted]
Adjudication Date	[Redacted]

The Claim Information section will supply additional detail for this claim.

## "Claim Status Detail" page - Payment Information section

Payment Information	
Check or EFT Trace No	Check Issue Or Eft Date
100000000	06/29/2017

The Payment Information section will supply a process trail for the payment(s) and recoupment(s) that occurred on this claim. A recoupment dollar amount will show as a negative "Claim Payment Amount" on a separate line from the initial payment. Each time the claim was included in a system check run you will find a new line in the Payment Information section.

### Please Note:

The "View Payments" link will navigate you to the "[Remittance Advice Search](#)" page with this claim # already filled into the "Payer Claim Control No" search field. Your results on that page will return only "Check or EFT Trace No" that this claim was included on.



## "Claim Status Detail" page - Service Line Information section

Service Line Information														
Line Counter	Service Date	Service Id Qualifier	Procedure	Procedure Modifier	Diagnosis Code 1	Revenue Code	Quantity	Claim Status Cat Code	Claim Status Code	Search by ICN	Service Line ICN	Charge Amt	Patient Responsibility Amt	Payme
1	05/19/2017 - 05/19/2017	CPT/HCPCS					1	Finalized/Payment				\$52.00	\$ 0.00	\$23.
2	05/19/2017 - 05/19/2017	CPT/HCPCS					1	Finalized/Payment				\$45.00	\$ 0.00	\$14.
3	05/19/2017 - 05/19/2017	CPT/HCPCS					1	Finalized/Payment				\$15.00	\$ 0.00	\$.

Claim Status Code Legend	
Code	Description

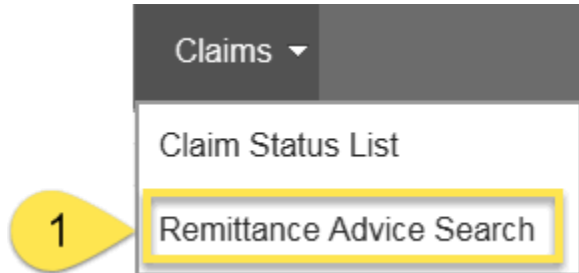
The Service Line Information section will return additional details of each service line submitted with this claim.

**Please Note:**  
You can hover over the Claim Status Code to see the Claim Status Code description or you can also find the descriptions in the Claim Status Code Legend.  
You can also hover over the Procedure and Diagnosis code(s) to display the code description.



### 3.2 Remittance Advice Search feature

This feature will allow you to search/view Explanation of Payments (EOPs) associated with your portal user account security rights.



#### Step 1

From the Claims drop-down of the menu bar, select the Remittance Advice Search option.



### 3.2.1 "Remittance Advice Search" page

#### 3.2.1.1 "Remittance Advice Search" page - Search section

### Remittance Advice Search

This page allows you to search for claim payment information. You can access all claims by clicking Search; desired. If no results are found, widen your search criteria.

**2** Search

**Payee Member**

**Remittance Advice No**

**Search Date Type**  Service Date  
 Payment Date

**Time Frame**

-OR-

**Single Date**   (mm/dd/yyyy)

#### Step 2

Search for the Explanation of Payment you need to review.

#### Please Note:

The results section will pre-populate with all available data, complete appropriate search criteria to narrow your results.



### 3.2.1.2 "Remittance Advice Search" page - Results section

Results		
Check or EFT Trace No	Payer Name	Payee Name
<u>10000000</u>		

Data from your search request will produce at the bottom of the page in the "Results" section.

**Please Note:**

The "Download File" link found above the Results section will export the content listed to an excel spreadsheet.





## "Remittance Advice Search" page - Results section - Check or EFT Trace No link

Results			
Check or EFT Trace No	Payer Name	Payee Name	Check Issue Or Eft Date
10000000			06/29/2017
			1

### Step 3

Select the "Check or EFT Trace #" link from your results section to open additional detail for that Explanation of Payment.

### Please Note:

Explanation of Payments (EOP) are a rendered version of the EOP with appropriate content displaying on the rendered form. The EOP that displays is **not** a PDF of what was mailed.

### 3.2.1.2.1 "Remittance Advice Detail" page

**Remittance Advice Detail**

**Remittance Advice No**

This page allows you to view detailed payment information on a selected claim. You can print a copy of the i Expand All icon and to minimize the information, click the Collapse All icon.

Payment Information	
<input type="text"/>	
Payee	<input type="text"/>
Memo	<input type="text"/> Contact

Search

After selecting the "Check or EFT Trace #" link you will be directed to the "Remittance Advice Detail" page. On this page you will find additional detail regarding:

- Payment Information
- Provider Information
- Contractual Adjustments
- Claim Information



## "Remittance Advice Detail" page - Payment Information

**Payment Information**

[Redacted]

Payee [Redacted]

Memo [Redacted]

In the Payment Information section you will find payer and payee content as well as check #, check date, and total payment amount. The layout will look similar to that of a check.

### **Please Note:**

The "Printer Friendly Format" link will open a new browser window with the content on the page in a printer friendly version.

The "Expand All" link will expand all collapsed Provider and Claim information sections.

The "Collapse All" link will collapse all expanded Provider and Claim information sections.

## "Remittance Advice Detail" page - Search section

**Search**

Health Plan ID#

Medicaid ID#

Patient Last Name

Render Prov Last Name

Payer Claim Control No

Use the search section on this page to narrow the return of Providers and/or claims that are returning on this particular Explanation of Payment.



## "Remittance Advice Detail" page - Provider Information section

### Provider Summary

#### Claims 1

**Total Charged** \$112.00

The Provider Information / Provider Summary section will return a high level overview of the claims included on this Explanation of Payment for this particular provider.

**Please Note:**

The "Expand/Collapse" link will expand or collapse all Claim Information on this EOP associated with this provider.

## "Remittance Advice Detail" page - Contractual Adjustments section

### Contractual Adjustments

Amount	Reason Code	Identifier
\$.90	Interest Owed	

The Contractual Adjustments section will show appropriate adjustments that were made for this provider via this Explanation of Payment (for example, Interest Owed or IRS withhold).



## "Remittance Advice Detail" page - Claim Information section

Claim Information					
Patient Name					
				Medicaid ID#	
Subscriber ID			Payer Claim Control No		
Patient Responsibility			Claim Start Date		
Dates of Service	Service Payment No	Revenue / Procedure Code	Charged	Allowed	Contractual Adjustments

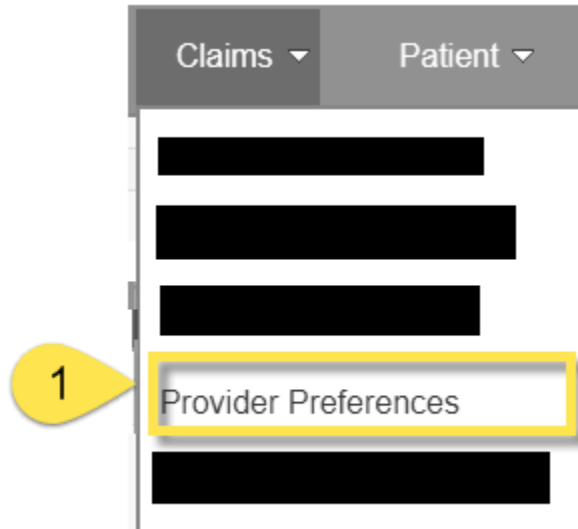
In the Claim Information section you will find additional detail for the Patient at the top and each line with paid amount identified at the bottom.

**Please Note:**  
The "Expand/Collapse" link will expand or collapse this specific Claim Information section on this EOP associated with this provider.  
The "Payer Claim Control No" will take you to the "[Claim Status Detail](#)" page



### 3.3 Claim Submission Feature

This feature will allow you to submit professional claims associated with your portal user account security rights.



#### Step 1

Prior to submitting your first claim, you will need to set your Provider Preferences. You will only need to do this once but can change your preferences at any time. From the claims drop-down of the menu bar select the Provider Preferences option



### 3.3.1 “Provider Preferences” page

#### Provider Preferences

\*Required Fields

Provider Preferences	
Preference	Value
Patient or Guardian Signature	Yes ▾
Place of Treatment	Office ▾
Subscriber Signature	Yes ▾
Treating Dentist or Provider Signature	Yes ▾
Accept Assignment	Assigned ▾
EPSDT	No ▾
Emergency	No ▾

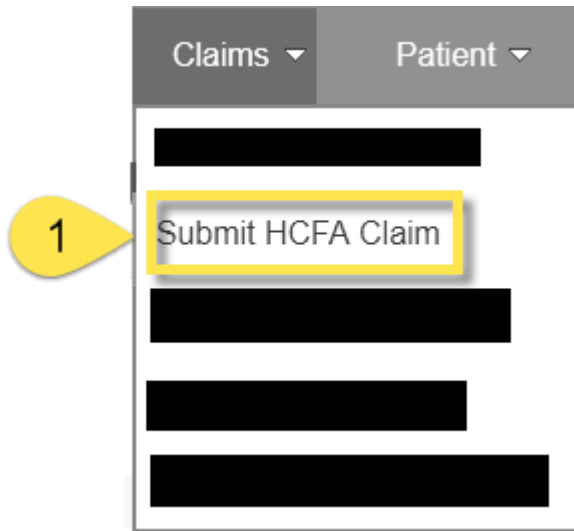
Each provider has a set of ‘preferences’ related to Claim Submission. The purpose of setting these defaults is to save time when submitting claims, so that a provider does not have to type the same information over and over on each claim. The items set up as defaults are typically required by the HCFA claim submission form and its electronic file equivalent, the 837p, and are fields that seldom vary from one claim to another. The default settings below are set initially by each Healthplan. Subsequently, each provider can accept these defaults ‘as is’, or change one or more for their own use in claim submission.

#### Fields:

- **Patient or Guardian Signature** and **Subscriber Signature** (Yes/No): Provider has patient’s consent to release medical information.
- **Place of Treatment/Facility Type Code**: The facility where the treatment or service occurred. Note, this preference simply sets a provider’s default choice. A provider has the option to select another choice at the time of each claim submission.
- **Treating Dentist or Provider Signature** (Yes/No): Yes indicates that a Provider’s Signature is on file.
- **Accept Assignment** (Assigned, Not Assigned, Patient refuses to assign benefits, or Assignment accepted on clinical lab services only)
- **EPSDT** (Yes/No): EPSDT stands for Early and Periodic Screening, Diagnosis and Treatment. EPSDT is a child health program in Medicaid. It is designed to help the physical, mental, and developmental health needs of children.
- **Emergency** (Yes/No): Indicates if the claim is for treatment of emergency services.



### 3.3.2 “Submit HCFA Claim” page



#### Step 1

From the Claims drop-down of the menu bar, select the Submit HCFA Claim option



### 3.3.2.1 Submit HCFA Claim” page – submission requirements

**Submit HCFA Claim**

To update your preferences navigate to the Claims drop down and click the menu item Provider Preferences. -Required Fields

**Member Information**

Patient Id Code=  1  
Patient Last Name=   
Patient First Name=   
Patient DOB=

**Provider Information**

Billing Provider Name=  2  
Location=   
Other Identifier=   
 Treating Same As Billing  
Treating Provider Name=   
Location=

**Diagnosis Codes - Enter up to 12 from either ICD9 or ICD10 code set**

Code Set List

Diagnosis Code 1=  3      Diagnosis Code 2=         Diagnosis Code 3=         Diagnosis Code 4=

**Claim Information**

Claim type=

**Service Line(s)**

From Service Date*	To Service Date*	Facility Type Code*	Procedure*	NDC's	Procedure Modifiers	Diagnosis Pointers**	Quantity**	Charge Amt**
<input type="text"/>	<input type="text"/>	<input type="text" value="Office"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>

**Other Claim Information - Click on a checkbox to expand a section for entry**

Enter Other Coverage       Enter Patient Related Causes       Enter Illness/Injury/Pregnancy/Ability to Work  
 Enter Referring Provider       Hospitalization Dates Related to Current Services       Enter Unable to Work in Current Occupation Dates  
 Enter File Attachments       Outside Lab       Enter Medicaid Resubmission

#### Step 2

##### Enter Claim Information

1. Patient Information
2. Provider Information
3. Diagnosis Information
4. Service Information
5. Other Claim Information (As applicable)

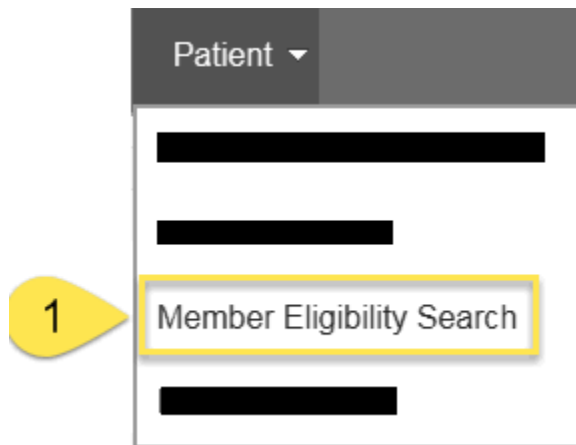




## 4. Patient Drop-down

### 4.1 Member Eligibility Search feature

Follow the steps (and review the information) below to search and view member eligibility and other information.



#### Step 1

From the Patient drop-down of the menu bar, select the Member Eligibility Search option



## 4.1.1 "Member Eligibility Search" page

### Member Eligibility Search

This page allows you to enter search criteria for a member. Health plans designate these criteria. Per HIPAA regulations, no more than four data elements can be required for a search. If you wish to search for ineligible members, select yes from the dropdown menu.

\*Required F

Search							<a href="#">Add Member</a>
Eligible as of Date	DOB **	SSN **	Health Plan ID#	Medicaid ID#	First Name	Last Name **	
1	08/16/2017 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Delete</a>
2	08/16/2017 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Delete</a>
3	08/16/2017 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Delete</a>
4	08/16/2017 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Delete</a>
5	08/16/2017 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Delete</a>

[Include Ineligible \(v\)](#)

### Step 2

Search for the member. After entering appropriate required fields select the "Search" button

### Please Note:

Required fields are DOB and Last Name OR Health Plan ID#. You can search for multiple members at one time. Initially you will find 5 rows available (to search for 5 members)

If you need to search for more than 5 members select the "[Add Member](#)" link (to a max of 30 rows)



#### 4.1.1.1 "Member Eligibility List" page

**Member Eligibility List**

This page displays the members meeting the search criteria. You can conduct another search by clicking search again, view member detail by clicking a member name link, view benefit plan information by clicking a plan number link, and display results in a form suitable for printing.

\*Required Fields

**Active** Download File Printer Friendly Format

Order Entered	Eligible as of Date	Health Plan ID#	Medicaid ID#	DOB	Member	Lock-In	SSN	Effective Dates	Policy Benefit Name	Benefit	Group No	Coverage Type Code	Network Name	Provider	Provider Effective Date
1															
2															
3															

**Ineligible** Download File

Order Entered	Eligible as of Date	Eligibility Member No.	Medicaid ID#	DOB	Member	Lock-In	SSN	Group No	Eligibility Effective Date	Eligibility Expiration Date	Benefit Information
3											

**Not Found**

Order Entered	Health Plan ID#	Medicaid ID#	DOB	First Name	Last Name	SSN	Error Message
4							Unable to identify member. You can search again with additional information or contact the health plan.

Note: If you wish to search again, the information you originally entered for these members will be retained allowing you to correct any information you previously entered.

After completing a valid search you will be directed to the Member Eligibility List page

On this page the members information will be routed into one of three sections/queues

**Active** (identified in **GREEN** in the image above) - Member currently has an active eligibility segment

**Ineligible** (identified in **YELLOW** in the image above) - Member has an eligibility segment, but that eligibility is currently terminated

**Not Found** (identified in **RED** in the image above) - Member was not found from the data entered on the Member Eligibility Search screen

**Please Note:**

Not Found section will only display when a member that was searched was not found in the system.



#### 4.1.1.1.1 "Member Eligibility List" page - Active section

Active											
Order Entered	Eligible as of Date ?	Health Plan ID# ?	Medicaid ID#	DOB ?	Member	Lock-In ?	SSN ?	Effective Dates	Policy Benefit Name ?	Benefit	Group
1										<a href="#">Usage</a>	
2										<a href="#">Usage</a>	
3										<a href="#">Usage</a>	

Each member in the "Active" section of the "Member Eligibility List" page will have a few links available

The Member name link will navigate you to the Member Detail page where you can find additional information regarding that member

The Policy Benefit Name link will navigate you to the Summary of Benefits page. On this page you can review any benefit plan specific documentation

The Benefit/Usage link will navigate you to the members Benefit Accumulators page

#### **Please Note:**

The "[Download File](#)" link found above the Active section will export the content listed to an excel spreadsheet.

The "[Printer Friendly Format](#)" link found above the Active section will open a new browser window with the content on the page in a printer friendly version.



## "Member Eligibility List" page - Active section - Member name link

Active								
Order Entered	Eligible as of Date ?	Health Plan ID# ?	Medicaid ID#	DOB ?	Member	Lock-In ?	SSN ?	Effective Dates
1				3				
2								
3								

**Step 3**  
Select the Member name link



#### 4.1.1.1.1 "Member Detail" page

**Member Detail**

This page displays member-specific information. The drill-down options may vary depending on permissions set up by the health plan. Among options for members are the ability to edit their PCPs, view their eligibility history, and others. If a user account has been defined, its information will be displayed. Members may also elect to share information with family or the subscriber.

**Search**

\*Eligible as of Date  (mm/dd/yyyy)

**Employer Label**

**Family**

Member	Lock-In ?	Relationship	Health Plan ID# ?

[View Accumulators](#) [View](#)

**Subscriber Name**

**Health Plan ID#**

**Medicaid ID#**

After selecting the Member Name link from the "Member Eligibility List" page you will be directed to that members detail page where you can find additional information regarding that member

The Member Detail page may include some (or all) of the sections below

**Family section** - In this section you will see all members currently active on the benefit plan during the "Eligible as of Date" you have selected (or identified at the top of the Member Detail page)

**Member Information section** - In this section you will find the member information for the current member you have selected (click [here](#) to see more information regarding selecting a member in the family section)

**Eligibility Information section** - In this section is the current eligibility information based on the "Eligible as of Date" that you selected (you will find this date identified at the top of the Member Detail page)

**Member Status Indicators section** - In this section you will find any status indicators assigned to the members record (for example Lock-In and/or suspension/disenrollment indicators)

**Primary Care Physician section** - In this section you will find the members current PCP assignment. This record will return real time from the eligibility system, so you can be sure the PCP listed is the members most current PCP assignment

**Member Contacts section** - In this section you will find any contacts assigned to the members record (for example care coordinator, pharmacy location lock-in, controlled substance provider lock-in, emergency room location lock-in)

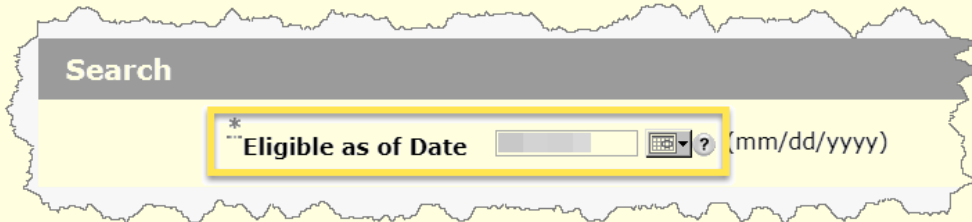
**Other Coverage section** - In this section we will store any other health/dental/vision coverage or Coordination of Benefits (COB) information

**Pending/Open Request section** - In this section we will store any requests for the member that are currently pending review/approval



**Please Note:**

The "Eligible as of Date", found at the top of the Member Detail page, will change the data being reflected on the member detail page. If you are trying to view information that is in the past or future please be sure to change the "Eligible as of Date" to a date in that time frame.





## "Member Detail" page - Family Section

Family			
Member	Lock-In ?	Relationship	Health Plan ID# ?
▶			

As mentioned previously, in the "Family" section you will see all members currently active on the benefit plan during the "[Eligible as of Date](#)" you have selected (or identified at the top of the Member Detail page)

Selecting the Member Name link will update the content in the Member Information Section with the member selected (click [here](#) to read more on the Member Information Section)

### **Please Note:**

For policies with more than one member, the member you are currently viewing will be identified with a highlighted bar and an arrow to the left of their name.





## "Member Detail" page - Member Information section

View Accumulators View Claims View Provider Directory

Subscriber Name [REDACTED]

Health Plan ID# [REDACTED]

Medicaid ID# [REDACTED]

Medicare ID# [REDACTED]

SSN [REDACTED]

DOB [REDACTED]

Gender [REDACTED]

Marital Status Code [REDACTED]

Address [REDACTED]

Home Phone [REDACTED]

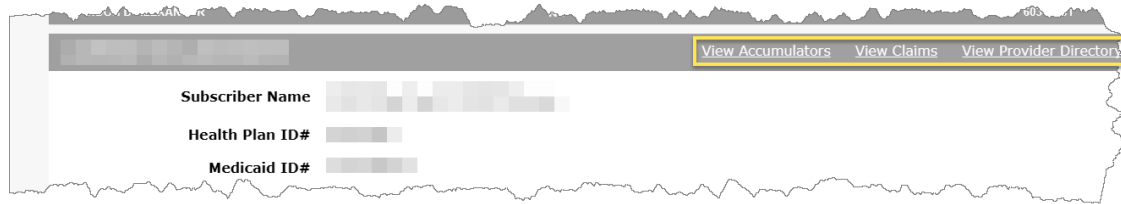
Work Phone [REDACTED]

Fax [REDACTED]

As mentioned previously, in the "Member Information" section you will find the member information for the current member you have selected (click [here](#) to see more information regarding selecting a member in the family section)  
The selected members name will appear in the section title



## "Member Detail" page - Member Information section links



You will find a few links just above the members information section on the "Member Detail" page

**[View Accumulators](#)** - this link will take you to the members Benefit Accumulators page. When applicable, a real time return of the members accumulators (for example in/out of network deductible or out of pocket) will be available

**[View Claims](#)** - this link will take you to the members Claim Status List page. On this page you will have access to any claim(s) this member currently has that are associated with your security rights

The "View Claims" page which was opened from the Member Detail page will only reference claims for the currently selected member, if you would like to search for all claims associated with your security rights select the Claims Status List option from the menu bar (you can read more about that feature [here](#)). You can also read more about the View EOB link [here](#) and the claim no link [here](#).



## "Member Detail" page - Eligibility Information section

Policy Benefit Name	Coverage Type Code	Coverage Level Code	Effective Date	Expiration Date
	Medical	Individual	02/09/2017	12/31/2199

As mentioned previously, in the "Eligibility Information" section you will find the current eligibility information based on the "Eligible as of Date" that you selected (you will find this date identified at the top of the Member Detail page)

The Policy Benefit Name will identify the members benefit plan. The name is also a link that will take you to the Summary of Benefits page where you can review any benefit plan specific documentation that is available

Once at the Summary of Benefits page selecting any available document link(s) will open a PDF in a new internet browser window

The Cancel button (or bread crumb trail) will navigate you back to the Member Detail page

### Please Note:

The "View Eligibility History" link found above the Eligibility Information section will take you to the "Member Eligibility History" page. Here you can review all historical eligibility segments

The "View Detail" link in the Eligibility History section will allow you to quickly navigate to a previous or future eligibility segment

Benefit Plan	Health Plan ID#	Group	Group No	Effective Date	Expiration Date
				02/09/2017	12/31/2199
				02/01/2017	02/08/2017



## "Member Detail" page - Member Status Indicators section

Status	Effective Date	Expiration Date	Alert Message
No Results Found			

As mentioned previously, in the "Member Status Indicators" section you will find any status indicators assigned to the members record (for example Lock-In and/or suspension/disenrollment indicators)

### **Please Note:**

The "[View History](#)" link found above the Member Status Indicators section will take you to the "Historical Member Status Indicators" page  
Here you can review all historical Member Status Indicators that were once active on the members record but are now in a terminated status

## "Member Detail" page - Primary Care Physician section

Care Management Type	Provider	Coverage Type Code	Provider Type	Network Name
Primary Care Physician			Physician	

As mentioned previously, in the "Primary Care Physician" section you will find the members current PCP assignment. This record will return real time from the eligibility system, so you can be sure the PCP listed is the members most current PCP assignment

The "Provider" name link will open the Provider Detail page where you can review additional detailed information for the members PCP

The last two columns of this section will identify the effective and termination date of the members PCP assignment



## "Member Detail" page - Member Contacts section

Member Contacts					<a href="#">View Historical Contacts</a>
Contact Type	Contact Name	Phone	Effective Date	Expiration Date	
No Results Found					

As mentioned previously, in the "Member Contacts" section you will find any contacts assigned to the members record (for example care coordinator, pharmacy location lock-in, controlled substance provider lock-in, emergency room location lock-in)

### **Please Note:**

The "[View Historical Contacts](#)" link found above the Member Contacts section will take you to the "Historical Member Contacts" page  
Here you can review all historical Member Contacts that were once active on the members record but are now in a terminated status

## "Member Detail" page - Other Coverage section

Other Coverage				
LOB Coverage Type	COB Code	Effective Dates	Insurer Name	Insurer Payment Order
No Results Found				

As mentioned previously, in the "Other Coverage" section you will find any other health/dental/vision coverage or Coordination of Benefits (COB) information

## "Member Detail" page - Pending/Open Request section

Pending/Open Request			
Request ID	Enrollment Request Type	Date Submitted	Current Reviewer
No Results Found			

As mentioned previously, in the "Pending/Open Request" section you will find any requests for the member that are currently pending review/approval



#### 4.1.1.1.2 "Member Eligibility List" page - Ineligible section

Ineligible								
Order Entered	Eligible as of Date ?	Eligibility Member No ?	Medicaid ID#	DOB	Member	Lock-In ?	SSN ?	Group No
3								

Each member in the "Ineligible" section of the "Member Eligibility List" page will have one link available  
The Member name link will navigate you to the Member Detail page

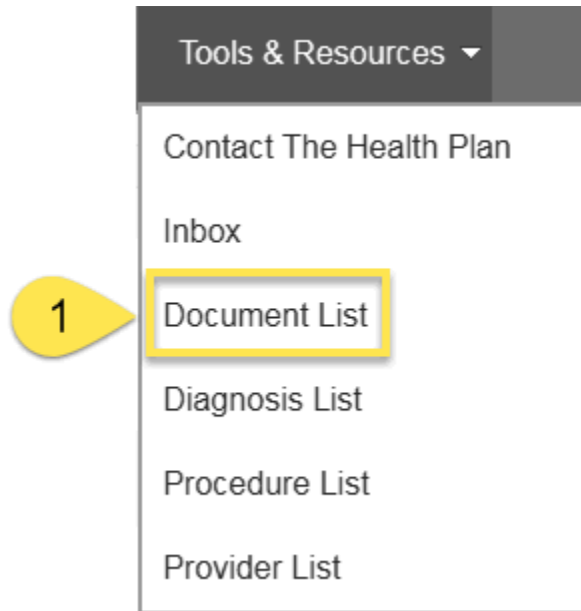
**Please Note:**

The "[Download File](#)" link found above the Ineligible section will export the content listed to an excel spreadsheet.



## 5. Tools & Resources Drop-down

### 5.1 Document List feature



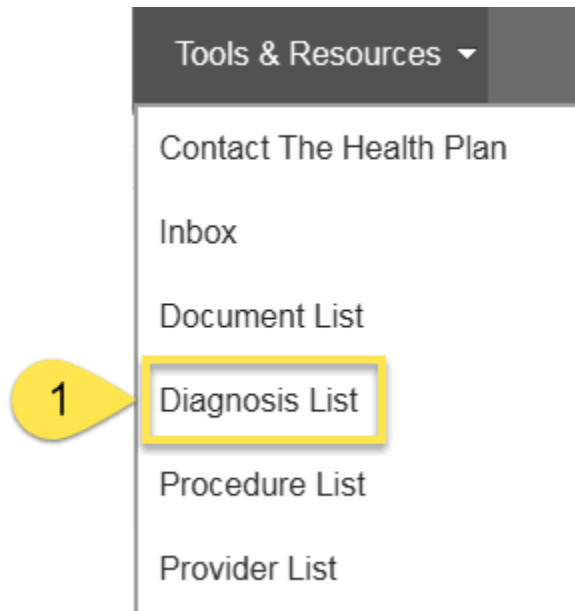
#### **Step 1**

From the Tools & Resources drop-down of the menu bar, select the Document List option



## 5.2 Diagnosis List feature

The Diagnosis List feature will allow you to search/view diagnosis codes.



### Step 1

From the Tools & Resources drop-down of the menu bar, select the Diagnosis List option





## 5.2.1 "Diagnosis List" page

### 5.2.1.1 "Diagnosis List" page - Search section

**Diagnosis List**

This page enables you to search for ICD9 categories and review ICD9 details. Enter the code or a part of its description. ICD9 details for the selected code.

**2** Search

Code Set  ?

Description  ?

Code  ?

Search

#### Step 2

Search for a diagnosis code by the code description or the code  
Select the "Search" button or enter key on your keyboard



### 5.2.1.2 "Diagnosis List" page - Results section

Results			<a href="#">Download File</a>
Code	Code Set <a href="#">?</a>	Description	
A000	ICD10	Cholera due to Vibrio cholerae 01, biovar cholerae	
A001	ICD10	Cholera due to Vibrio cholerae 01, biovar eltor	

1

Data from your search request will produce at the bottom of the page in the "Results" section

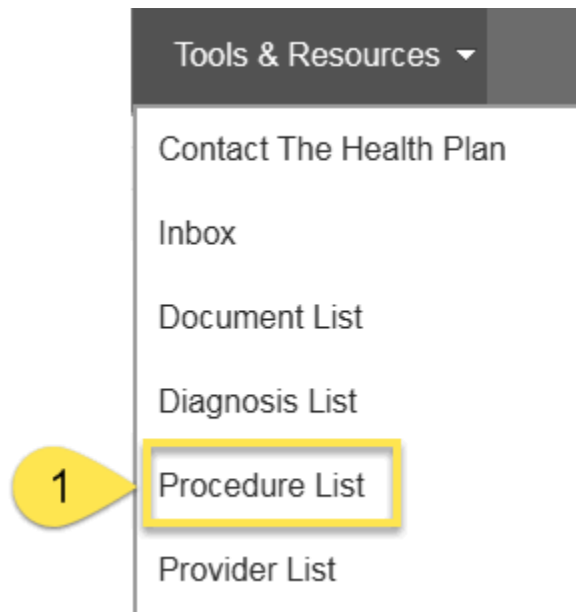
**Please Note:**

The "Download File" link found above the Results section will export the content listed to an excel spreadsheet.



### 5.3 Procedure List feature

The Procedure List feature will allow you to search/view procedure codes.



#### Step 1

From the Tools & Resources drop-down of the menu bar, select the Procedure List option



## 5.3.1 "Procedure List" page

### 5.3.1.1 "Procedure List" page - Search section

**Procedure List**

This page allows you to list the procedure codes and descriptions. You can narrow the list by entering a search criteria.

**2** Search

Code  ?

Procedure Code Description  ?

Code List Qualifier Code  ▼

Code Set  ▼ ?

Search

#### Step 2

Search for a procedure code by the available search fields  
Select the "Search" button or enter key on your keyboard



### 5.3.1.2 "Procedure List" page - Results section

Results <span style="float: right;">Download File</span>		
Code	Procedure Code Description	Code Set
0022	SKILLED NURSING FACILITY - PPS	
0550	HOME HEALTH - SKILLED NURSING GENERAL CLASSIFICATI	
0551	HOME HEALTH - SKILLED NURSING VISIT CHARGE	
0552	HOME HEALTH - SKILLED NURSING HOURLY CHARGE	
0559	HOME HEALTH - SKILLED NURSING OTHER	

1

Data from your search request will produce at the bottom of the page in the "Results" section

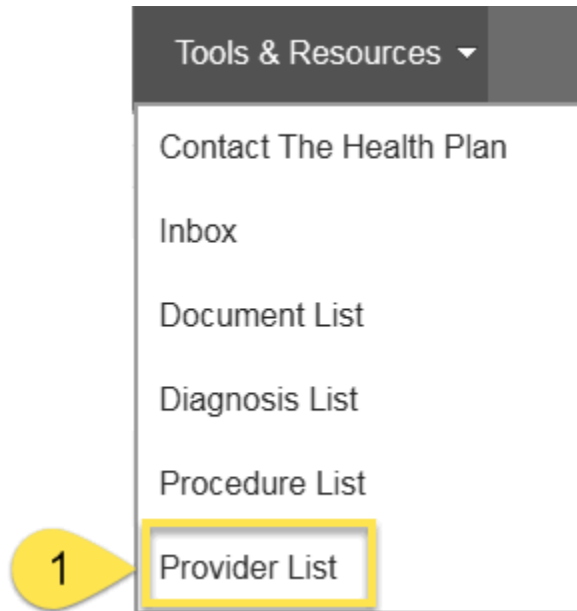
**Please Note:**

The "Download File" link found above the Results section will export the content listed to an excel spreadsheet.



## 5.4 Provider List feature

The Provider List feature will allow you to search/view individual providers, hospitals/facilities, and groups associated with your security rights



### Step 1

From the Tools & Resources drop-down of the menu bar, select the Provider List option



## 5.4.1 "Provider List" page

### 5.4.1.1 "Provider List" page - Search section

## Provider List

This page allows you to search for and select a service provider. By default all providers are listed. To narrow next to the provider number selects that provider. Clicking the provider name displays detailed information for

**2** Search

**Provider Last Name**  ?

**First Name**  ?

**Provider No**

**Provider Type**

**Specialty**

**Network Name**

**Affiliation Type**

**Par Code**

**In Directory**

**City**  ?

**State**  ?

**Contact Phone**

Search

#### Step 2

Search for a provider (individual, hospital/facility, or group) by the available search fields

Select the "Search" button or enter key on your keyboard

#### Please Note:

The results section will pre-populate with all available data, complete appropriate search criteria to narrow your results

The "Download File" link found above the Results section will export the content listed to an excel spreadsheet

The "Printer Friendly Format" link found above the Results section will open a new browser window with the content on the page in a printer friendly version



### 5.4.1.2 "Provider List" page - Results section

Results							
Provider No	Provider NPI	Provider	Provider Type	Specialty	Network Name	Address	Contact Phone
[REDACTED]	[REDACTED]	[REDACTED]	Physician		[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	Physician		[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	Physician		[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	Physician	Multi-Specialty - Multi-Specialty Pediatrics - Adolescent Medicine Clinic/Center - Rural Health Nurse Practitioner - Pediatrics	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	Physician	Multi-Specialty - Multi-Specialty Pediatrics - Adolescent Medicine Clinic/Center - Rural Health Nurse Practitioner - Pediatrics	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	Physician	Multi-Specialty - Multi-Specialty Pediatrics - Adolescent Medicine Clinic/Center - Rural Health Nurse Practitioner - Pediatrics	[REDACTED]	[REDACTED]	[REDACTED]

1

Data from your search request will produce at the bottom of the page in the "Results" section





## "Provider List" page - Results section - Provider name link

Provider No	Provider NPI	Provider	Provider Type	Specialty	Network Name	Address ?	Contact Phone
[REDACTED]	[REDACTED]	[REDACTED]	Physician		[REDACTED]		
[REDACTED]	[REDACTED]	[REDACTED]	Physician		[REDACTED]		
[REDACTED]	[REDACTED]	[REDACTED]	Physician		[REDACTED]		

### Step 3

Select the Provider name link to view more detail information for that record

#### 5.4.1.2.1 "Provider Detail" page

**Provider Detail**

This page allows you to view/edit information for the selected provider. Clicking the edit link allows you to change general information for this provider as PCP. Click any add links to add additional information for subject area, or click any existing links to edit information.

**General Information** [View Panel Roster](#)

Provider Last Name [REDACTED]

First Name [REDACTED]

On the Provider Detail page you can review additional information for that provider. This may include additional general information, other identifiers (TIN/NPI), other languages spoken, available taxonomies and certifications, accreditation(s), locations, network affiliations, affiliations, and patient restrictions.

#### Please Note:

What data is available to display may differ by provider.



## 6 Office Administration Drop-down

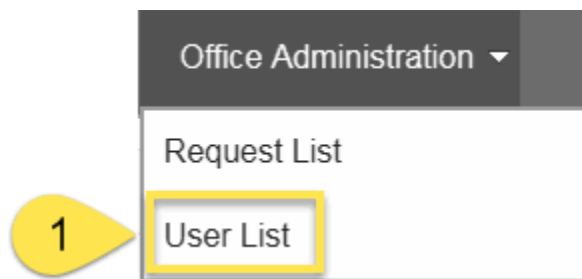
### 6.1 User List feature

**Please Note:**

This feature is only available for Provider Administrator users

The User List feature will allow you to maintain the user accounts for associates at your office. Within the User List functionality you can:

1. Add a user
2. Edit existing user accounts
3. Delete existing user accounts
4. Send a user a temporary password
5. Unlock a user account



**Step 1**

From the Office Administration drop-down of the menu bar, select the User List option



## 6.1.1 "User List" page

### 6.1.1.1 "User List" page - Search section

**User List**

This page lists all the users defined for your system. To narrow the list, you can sort the list by list link to the user's detail page from where you can edit the user information, reset the user's

**2** Search

First Name  ?

Last Name  ?

Username  ?

User Role  ▼

Office

Locked  ?

Deleted  ?

Search

#### Step 2

Search for the user account

#### Please Note:

If you are unable to find a user account one of a few things could be happening

1. The user may not have access at this time, go here to follow the steps for creating a new user account
2. The user may have locked their user account, to see all locked user accounts change the "Locked" drop-down from No to Yes
3. The user may have a deleted user account, to see all deleted user accounts change the "Deleted" drop-down from No to Yes
4. The user account is not associated with this particular security rights you are currently viewing, go here to review the process of logging in to linked accounts (you will see the current security association for this user account just above the menu bar)



### 6.1.1.2 User List page - Results section

Name	Username	Office	Role	Locked	Lockout Time	Deleted	
			Provider - Self Registration User	N		N	<a href="#">Delete</a>

Data from your search request will produce at the bottom of the page in the "Results" section

#### Please Note:

The "[Download File](#)" link found above the Results section will export the content listed to an excel spreadsheet.

#### 6.1.1.2.1 Add a user account

Name	Username	Office	Role	Locked	Lockout Time	Deleted	
			Provider - Self Registration User	N		N	<a href="#">Delete</a>

#### Step 3

Select the "Add User" link found just above the "Results" section



## "User Type" page

User Information

\*  
User Type Provider

4 Next >

**Step 4**  
Select the "Next" button

**Please Note:**  
You should only have the "User Type" of Provider and the option should already be selected.

## "Provider Employee List" page

Provider Employee List

This page allows you to select the provider employee from a list of eligible employers when creating a new provider employee user. ..Required Field

Search

5 Last Name Smith

Search

Results

Select	Name	Role	Title/Pos	Phone
No Results Found				

6 Add Employee

**Step 5**  
Search for the employee by their Last Name

**Step 6**  
If you are unable to find an existing employee record select the "Add Employee" link

**Please Note:**  
If you are able to find an employee record validate again that a user account does not already exist. If a user account does not exist click the "select" link to the left of the employee Name field and review next steps here.



## "Add Provider Employee" page

### Add Provider Employee

**Provider Name:**

This page allows you to view the provider's employee information. If adding, enter employee first and last name. submit saves the information.

#### Provider Type

**7** \* Last Name

\* First Name

Middle Initial

Prov Employee No

Telephone

Fax

Email Address

Title/Position

### Step 7

Enter Required records and select the "Submit" button

### Please Note:

Required elements are marked with a **red \***



## "Provider Employee List" page - select link

Results	
Select	Name
<a href="#">select</a>	Smith, Test

You will now be returned to the "Provider Employee List" page

### Step 8

Search for the employee record you added and click the [select](#) link to the left of the employee "Name"



## "Add User" page

### User Information

9

\*  
Last Name  ?

\*  
First Name  ?

Middle Name  ?

\*  
User Role  ▼

\*  
Username  ?

\*  
Password  ?

\*  
Confirm Password  ?

Password Question 1  ▼

Password Answer 1

\*  
Email  ?

### Step 9

Enter Required records and select the "Submit" button

### Step 10

User account has now been created but the portal does not currently send any automated emails with sign on credentials. You will now need to send the user the portal URL, their username, and a temporary password (click here to see the process of sending temporary passwords).

### Please Note:

Required elements are marked with a **red \***

### Also Note:

User Roles:

**Provider - Clerical User** - access to eligibility

**Provider - Claims User** - access to claims/EOPs/eligibility

**Provider - Administrator** - access to claims/EOPs/eligibility plus office administrator rights

**Provider - Self Registration User** - default role, access is identical to the Provider - Claims User role





### 6.1.1.2.2 Editing an existing user account

Results							Download File	Add User
Name	Username	Office	Role	Locked	Lockout Time	Deleted		
<a href="#">Name</a>			Provider - Self Registration User	N		N	Delete	
1								

**Step 3**  
Select the "Name" link

### User Detail page

**User Detail**

This page allows you to view details for the selected user. You can edit or delete the user and reset the user's password.

User Information		Reset P	4	Edit User	Delete User
Name					
Username					
Role					
Password Question 1					
Password Answer 1					
Email					

**Step 4**  
Select the "Edit User" link



## Edit User page

### Edit User

This page allows you to change a user's name, email address, preference, role and verbose level. C

#### User Information

5

<b>* ***</b> First Name	<input type="text"/>	?
<b>Middle Name</b>	<input type="text"/>	?
<b>* ***</b> Last Name	<input type="text"/>	?
<b>Username</b>	<input type="text"/>	
<b>* ***</b> User Role	Provider - Self Registration User	▼
<b>Password Question 1</b>	What is your favorite color?	▼
<b>Password Answer 1</b>	GREEN	
<b>* ***</b> Email	<input type="text"/>	?
<b>Office</b>	<input type="text"/>	
<b>* ***</b> Locked	No	▼ ?
<b>* ***</b> Deleted	No	▼ ?
<b>Verbose Level</b>	None	

#### Phone

<b>Mobile Carrier</b>	<input type="text"/>	▼
<b>Mobile Phone Number</b>	<input type="text"/>	?

### Step 5

Make appropriate adjustments to the "User Information", "Phone", or "Preferences" section and click the "Submit" button at the bottom of the page



### 6.1.1.2.3 Deleting an existing user account

Results							Download File	Add User
Name	Username	Office	Role	Locked	Lockout Time	Deleted		
			Provider - Self Registration User	N		N	<b>3</b> <a href="#">Delete</a>	
1								

**Step 3**  
Select the "Delete" link



## "Delete User" page

**Delete User**

This page allows Health Plan users to remove a user from the database; the user will no longer be able to use the system operation. Members with active benefits cannot be removed, and you cannot delete your own user account.

**User Information**

Name [Redacted]  
Username [Redacted]  
Role [Redacted]  
Password Question 1 [Redacted]  
Password Answer 1 [Redacted]  
Email [Redacted]  
Office [Redacted]  
Locked [Redacted]  
Deleted [Redacted]  
Verbose Level [Redacted]

**Phone**

Mobile Carrier [Redacted]  
Mobile Phone Number [Redacted] ?  
Primary Phone Number [Redacted] ?

4

### Step 4

Select the "Delete" button found near the bottom of the page

### Please Note:

The user account is now logically deleted. To review this deleted user account ensure the "Deleted" drop-down box on the User List page is set to Yes.



#### 6.1.1.2.4 Send a user a temporary password

Name	Username	Office	Role	Locked	Logout Time	Deleted
			Provider - Self Registration User	N	N	Delete
1						

**Step 3**  
Select the "Name" link

#### "User Detail" page

**User Detail**

This page allows you to view details for the selected user. You can edit or delete the user and reset the user's password.

**User Information**      [Reset Password](#)   [Edit User](#)   [Delete User](#)

**Name** [Redacted]  
**Username** [Redacted]  
**Role** [Redacted]  
**Password Question 1** [Redacted]  
**Password Answer 1** [Redacted]  
**Email** [Redacted]

**Step 4**  
Select the "Reset Password" link



## "Reset User Password" page - Reset Password button

**Reset User Password**

This page allows health plan users to reset a user's password. If granted permission, provider employees and employers current password remains in effect if you click cancel.

**Password Information**

**Password Question 1** What is your favorite color?  
**Password Answer 1** GREEN

**Password Question 2**  
**Password Answer 2**

**Password Question 3**  
**Password Answer 3**

**5** **Reset Password**

**New Password** ?

**Submit** **Cancel**

### Step 5

Select the "Reset Password" button

### Please Note:

You should now see a system generated temporary password generate next to the "New Password" field



## "Reset User Password" page - Submit button

Password Answer 3

Reset Password

New Password ij8WL7

6 Submit Cancel

### Step 6

Select the "Submit" button

#### Please Note:

A system generated password has now been sent to the email associated with the users account.

### 6.1.1.2.5 Unlocking an existing user account

Results							Download File	Add User
Name	Username	Office	Role	Locked	Lockout Time	Deleted		
			Provider - Self Registration User	Y	08/21/2017 02:55:30 PM	N	Delete	
1								

### Step 3

Select the "Name" link

#### Please Note:

To locate a locked user account please make sure the search field "Locked" is set to Yes.



## User Detail page

**User Detail**

This page allows you to view details for the selected user. You can edit or delete the user and reset the user's password.

**User Information** [Reset P](#) **4** [Unlock](#) [Edit User](#) [Delete User](#)

**Name** [Redacted]

**Username** [Redacted]

**Role** [Redacted]

**Password Question 1** [Redacted]

**Password Answer 1** [Redacted]

**Email** [Redacted]

### Step 4

Select the "Unlock" link

#### **Please Note:**

The users account is now unlocked.

If the user has also forgot their password you can quickly submit a temporary password by selecting the "Reset Password" link after unlocking the users account.

[Click here](#) to read more.





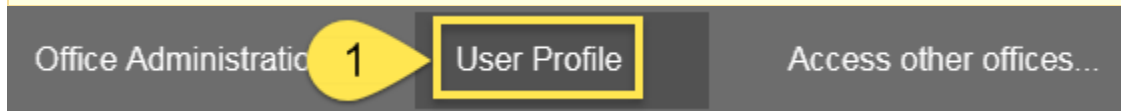
## 7 User Profile Feature

The User Profile feature holds information pertaining to your portal user account. The data elements updated on this page will only update the information stored for your portal user account.

**Please Note:**

From this page you can update the below information associated with your portal user account:

- First / Middle / Last Name
- Password
- Email Address
- Security Question(s)
- Phone Number (Mobile Carrier and Mobile Phone Number are used for text message notifications)
- Preferences (for example email and text message notification)



**Step 1**

From your menu bar, select the User Profile option



## 7.1 "User Profile" page

**User Profile**

This page displays information associated with the currently logged-in user and permits that user to make name, password, and the Home Page.

**Personal Information**

2 \* First Name  ?

Middle Name  ?

\* Last Name  ?

**Change Password**

If no text is entered in this section, your password will remain unchanged.

Old Password

### Step 2

Update appropriate text boxes with new content

### "User Profile" page - Submit button

Preference

Accept Email Notification

Accept Text Message Notification

Receive Notification For Child Affiliation Remittance Advice

Receive Notification For Remittance Advice

3

### Step 3

Select the "Submit" button

#### Please Note:

Values for your portal user account have now been updated in the database. For some fields (like First Name and Last Name) you will need to log out and back in before you see updates throughout the portal (for example the name currently displaying in the page header).