



# Provider Portal User Guide

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## 1. Login Page

The screenshot shows a login page titled "Log In Here". It features a "Username" field with a "Forgot?" link, a "Password" field with a "Forgot?" link, a "Log In" button, and three registration links: "Don't have a Member Account? Register here.", "Don't have a Provider Account? Register here.", and "Are you a Case Worker? Register here.". Numbered callouts are present: 1 points to the Username field, 2 points to the "Don't have a Provider Account? Register here." link, and 3 points to the Password field.

**Log In Here**

Username [Forgot?](#)

1

Password [Forgot?](#)

3

**Log In**

Don't have a Member Account?  
Register here.

2

Don't have a Provider Account?  
Register here.

Are you a Case Worker?  
Register here.

### Please Note:

If you have not done so already (or you require additional access) follow the process within the "Don't have a Provider Account? Register here " to create a portal user account request.

## 1.1 "Don't have a Provider Account? Register here." link

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

### "Provider Information" page (Provider Self-Registration)

## Provider Information

Please Note: For the required field of TIN you will need to enter a prefix of T in front of your Tax Identification Number (TIN), for example TIN is 091234567 so the field will need T091234567 populated (the field will need to be entered exactly as shown, please do not include any extra characters).

\*Required Fields

* First Name	<input type="text"/>	?
* Last Name	<input type="text"/>	?
* Phone	<input type="text"/>	?
* Email	<input type="text"/>	?

### Search for your Provider Office

* Tax ID Number	<input type="text" value="T"/>
-----------------	--------------------------------

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 "Tax ID Number" please contact your provider relations specialist

## "Provider Employee Information" page

**Provider Employee Information**

Please complete your information in the fields below.

\*Required Fields

**Enter Provider Employee Information**

\* Last Name

\* First Name

Middle Initial

Title/Position

< Back Next > Cancel

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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 "Next" button. Complete all required fields and select the "Submit" button to complete the registration.

## "User Information" page

Complete all required fields and select the "Submit" button to complete the registration.

**User Information**

Complete the below fields to establish a user account that will allow you to access the portal

\*Required Fields

**Enter User Information**

\* Last Name

\* First Name

Middle Initial

\* Username

\* Password

\* Confirm Password

\* Password Question 1

\* Password Answer 1

\* Email

\* Confirm Email

**User Preferences**

Accept notification emails	Yes
Allow health plan to login to the portal as yourself, to better assist and support you.	Yes
Accept Text Message Notification	No
Receive Notification For Remittance Advice	No
Receive Notification For Authorizations	No
Receive Notification For Child Affiliation Remittance Advice	No
Receive Notification For Child Affiliation Authorizations	No
Receive notifications for new Documents loaded to the Portal	Yes

< Back Submit Cancel

## 1.2 "Forgot?" link

**Log In Here**

Username 1 [Forgot?](#)

Password 2 [Forgot?](#)

**Log In**

Don't have a Member Account?  
Register here.

Don't have a Provider Account?  
Register here.

Are you a Case Worker?  
Register here.

- 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.

### Forgot your username

If you forgot or misplaced your username you can submit a request through the "Forgot?" button

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?" button you will be directed to the "User Name Request" page.

## "User Name Request" page



### User Name Request

\*Required Fields

#### User Name Request

*	Email	<input type="text"/>
*	First Name	<input type="text"/> ?
*	Last Name	<input type="text"/> ?

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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.



## "User Name Request" page



### User Name Request

User Name for

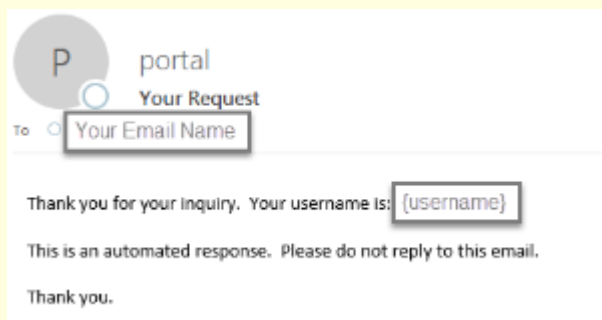
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After selecting the "Next" button you will be navigated to the User Name Request page. To complete your request and have the system send your user name via email select the "Send Username" button.

#### 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.



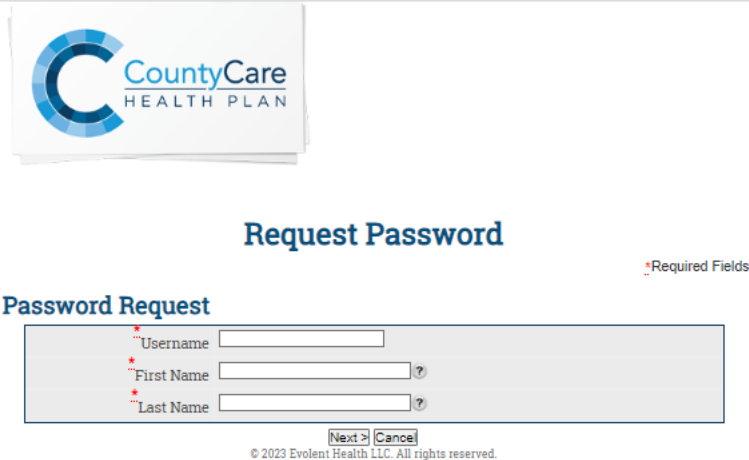
## Forgot your password

If you forgot your password you can request a temporary password through the "Forgot?" button.

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?" button you will be directed to the "Request Password" page.

### "Request Password" page



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.

## "Request Password Response" page



### Request Password Response

Password Request for [redacted]

[Send Password](#) [Cancel](#)

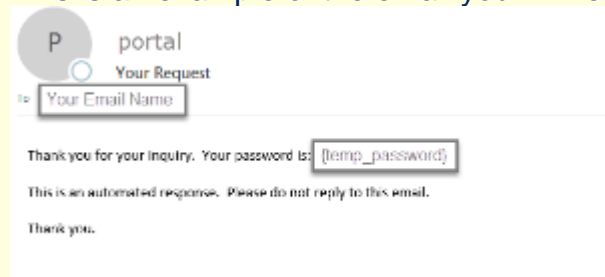
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After selecting the "Next" button you will be navigated to the page below. To complete the request and have the website send a temporary password select the "Send Password" button.

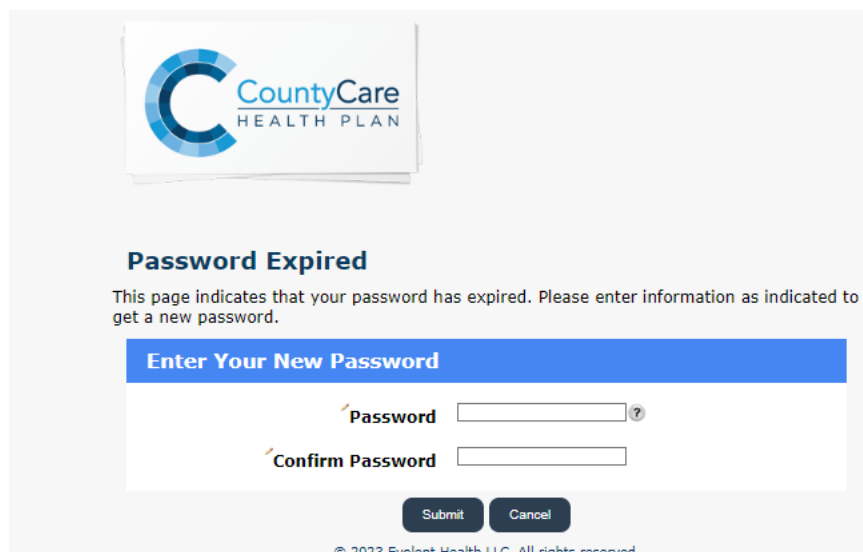
#### Please Note:

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




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

Home	Claims ▾	Eligibility ▾	Resources ▾	Administration ▾	Portal Account	Access Other Offices	Authorizations	Identifi SSO	InterQual Criteria	ProviderLink HEDIS
------	----------	---------------	-------------	------------------	----------------	----------------------	----------------	--------------	--------------------	--------------------

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
Eligibility	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><li>• Redetermination Date</li><li>• A/B Indicator</li><li>• Risk Score</li><li>• Risk Level</li></ul> Any Pending / Open Requests
Eligibility	Panel Roster	Go here to search and review your current panel roster / member assignments
Resources	Contact the Health Plan	<ul style="list-style-type: none"><li>• When available, go here to submit a secure message</li></ul>
Resources	Inbox	Go here to review all available secure messages
Resources	Document List	Go here to search for available documents
Resources	Diagnosis List	Go here to search ICD9/ICD10 codes
Resources	Procedure List	Go here to search procedure codes

Drop-Down	Feature	Description
Resources	Provider List	Go here to review all provider records associated with your security rights
Resources	ProviderLink User Guide	Go here to view ProviderLink User Guide
Administration	Request List	When available, go here to review any pended portal self-registration requests associated with your security rights
Administration	User List	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> <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	Portal Account	Go here to update information associated with this portal user account
N/A	Access other offices	When available, go here to access any other offices available within your rights. <ul style="list-style-type: none"> <li>• If you need additional NPI(s) associated to your account please contact your provider relations representative.</li> </ul>
N/A	Authorizations	Go here to go to Authorizations
N/A	Identifi SSO	Go here to go to Identifi SSO
N/A	InterQual Criteria	Go here to go to InterQual Criteria
N/A	ProviderLink HEDIS	Go here to go to ProviderLink HEDIS

## 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



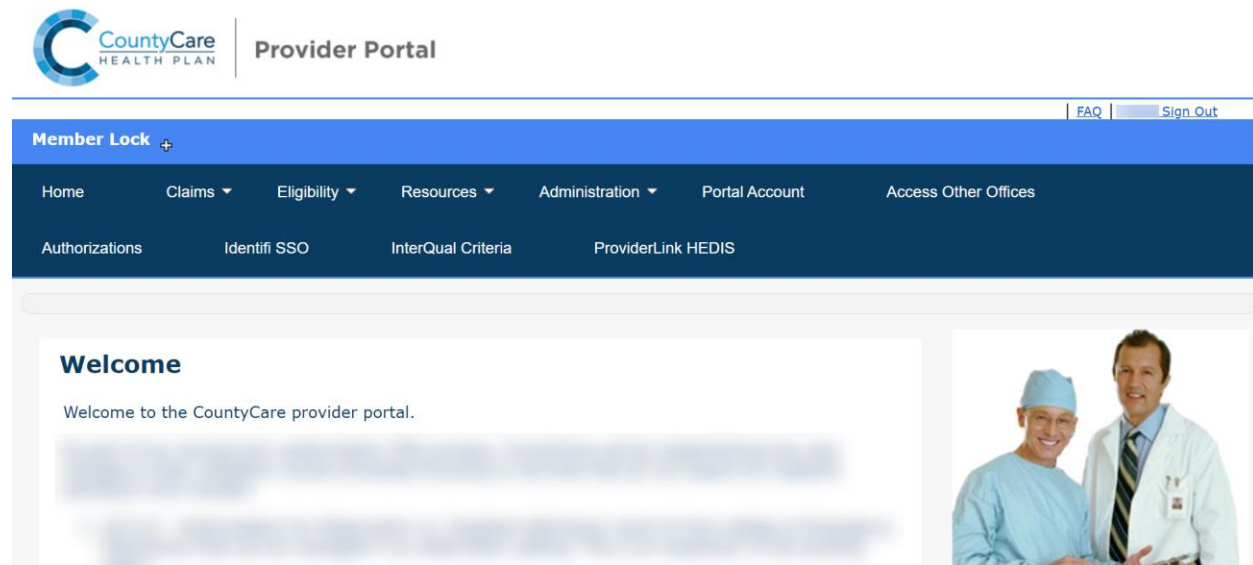
Within all header content you will find quick links to view all available Frequently Asked Questions (FAQ) and a Sign Out link.

**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](#).

### 3. Home Page

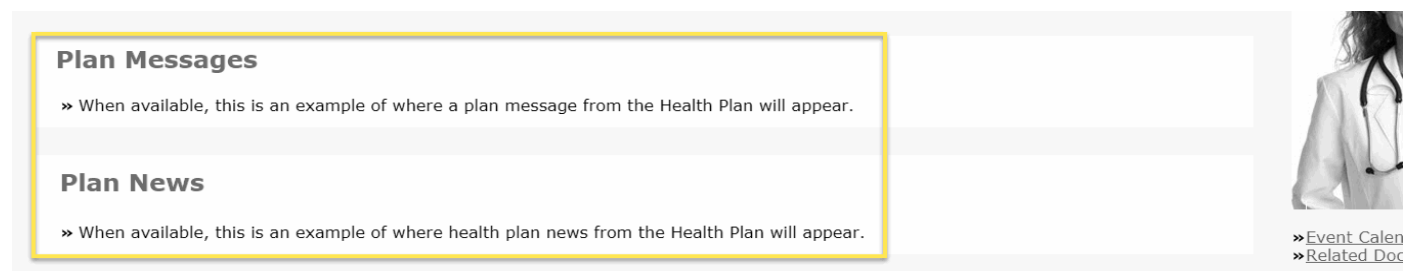


Above is your home page. This is the page you will first navigate to upon every sign on.

#### **Please Note:**

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

### 3.1 Messages



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.



## 3.2 Contact

### Contact

Call us at : [REDACTED]

Have a question? Contact your Provider Relations Representative or email us:  
[REDACTED]

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

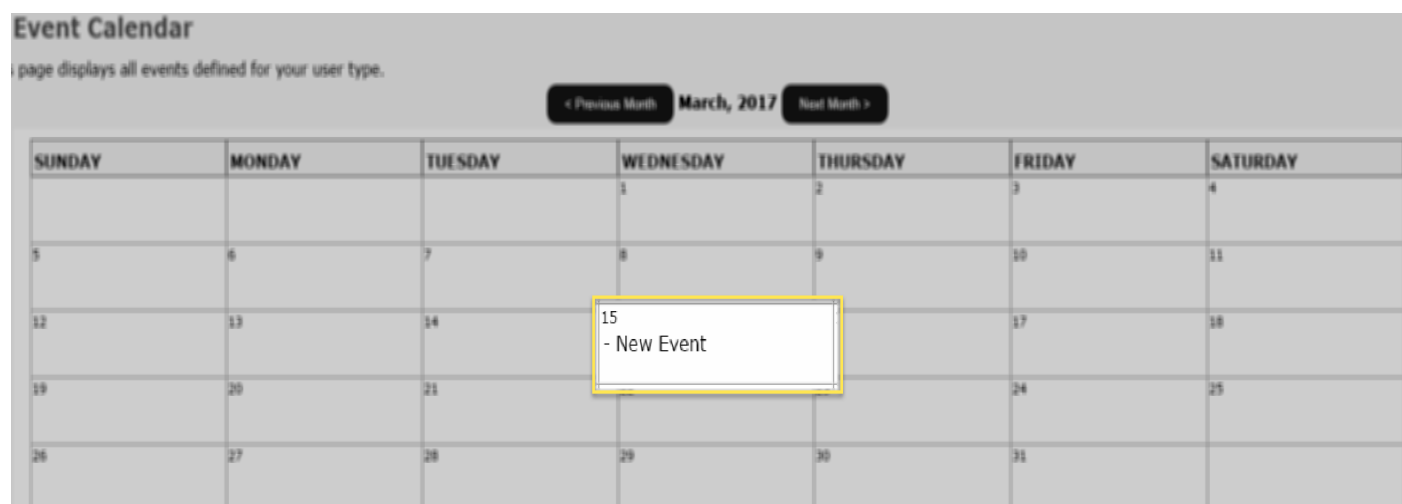
## 3.3 "Event Calendar" link



»Event Calendar  
»Related Documents

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

## "Event Calendar" page



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.

## "Day Events" page



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).

### 3.4 "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.

### "Related Document" 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.

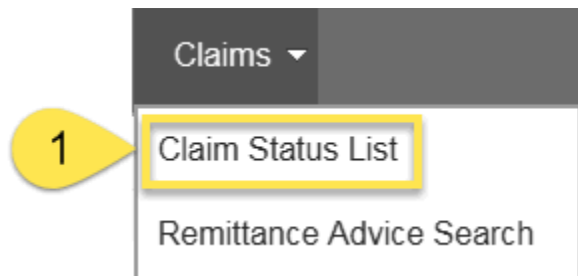
#### Please Note:

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.

## 4. Claims Drop-down

### 4.1 Claim Status List

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

### Claim Status List page

A screenshot of the 'Claim Status List' page. At the top, the title 'Claim Status List' is followed by a paragraph of instructions: '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 proc a remittance advice search, or Submit a New Claim to begin a claim submission process. Click Search Again to initiate a new se'. Below this is a 'Search' section with a grey header. Under the header, there are two main sections: 'Patient/Subsriber Information' and 'Claim Information'. The 'Patient/Subsriber Information' section contains fields for 'First Name', 'Last Name', 'Health Plan ID#' (with a sample value '(123456)'), 'Medicaid ID#', 'DOB' (with a date format '(mm/dd/yyyy)' and a calendar icon), and 'Gender'. The 'Claim Information' section contains a 'Servicing Provider Name' dropdown menu. A yellow callout bubble with the number '2' points to the 'Search' header. A green callout bubble with the number '1' points to the 'First Name' field. Another green callout bubble with the number '2' points to the 'Claim Information' section header.

#### 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.

## "Claim Status List" page - Results Section

Results										Export	Download PDF
Claim No	Claim Type	Member Name	Member No	Medicaid No	Service Date	Name	?	Claim Status	Total Claim Charge Amt	Payment	

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 - Claim # link

Results											Download File
Claim #	Claim type	Member	Health Plan ID#	Medicaid ID#	Svc date	Provider	Claim status	Charge amt	Patient resp	Payment	
3	Professional				05/19/2017		Finalized/Payment				
1											

### Step 3

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


## "Claim Status Detail" page

### Claim Status Detail

Please Note: Claims in the Pending/In Process status are subject to change and should not be considered final until the claim has reached the Finalized/Payment status.

\*Required Fields

#### Patient Information

 [Printer Friendly Format](#)

Member Name  
Member No  
Medicaid No  
DOB  
Gender  
Patient Control No

#### Servicing Provider Information

Name  
Provider No  
Provider TIN  
Provider NPI

#### Claim Information

Claim No  
Claim Type  
Claim Status

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

### Claim Status Detail

Please Note: Claims in the Pending/In Process status are subject to change and should not be considered final until the claim has reached the Finalized/Payment status.

\*Required Fields

#### Patient Information

 [Printer Friendly Format](#)

Member Name  
Member No  
Medicaid No  
DOB  
Gender  
Patient Control No

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 "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  
Provider No  
Provider TIN  
Provider NPI

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 No	
Claim Type	
Claim Status	
Calculated DRG	
Service Date	
Claim Status Code	
Total Claim Charge Amt	
Payment	
Claim Received Date	

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

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

Payment Information <a href="#">View Payments</a>			
Check Or Eft Trace No	External Check or EFT Trace No ?	Check Issue Or Eft Date	Claim Payment Amount

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	Facility Type Code	Service Id Qualifier	Procedure	NDC Codes	Procedure Modifier	Diagnosis Code 1	Revenue Code	Quantity	Claim Status Cat Code	Claim Status Code	Charge Amt	Payment	Deleted

Claim Status Code Legend

Code	Description

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

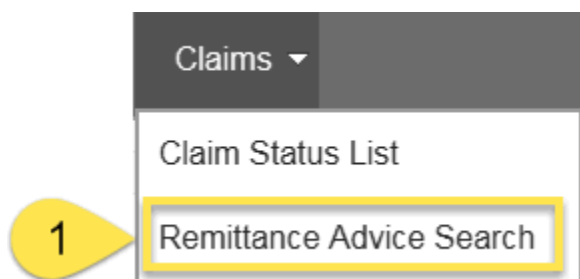
### Please Note:

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.

## 4.2 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.

## "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  Clear

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.

## "Remittance Advice Search" page - Results section

Results			
Check Or Eft Trace No	External Check or EFT Trace No ?	Payer Name	Payee Name

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	External Check or EFT Trace No ?	Payer Name	Payee Name
3	0000000000		

### 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.

## "Remittance Advice Detail" page

### Remittance Advice Detail

#### Remittance Advice No [REDACTED]



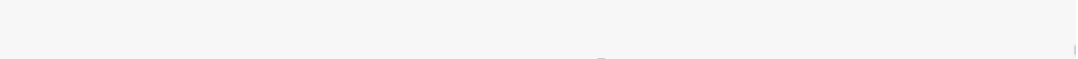
This page allows you to view detailed payment information on a selected claim. You can print a copy of the i Expand All icon and to minimize the information, click the Collapse All icon.

Payment Information	
[REDACTED]	
Payee	[REDACTED]
Memo	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	
	
Payee	
Memo	

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	
Member No	<input type="text"/>
Medicaid No	<input type="text"/>
Patient Last Name	<input type="text"/>
Render Prov Last Name	<input type="text"/>
Payer Claim Control No	<input type="text"/>
<input type="button" value="Search"/>	

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.

## Provider Summary

**Total Charged \$112.00**

### Please Note:

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

Claim Information										<a href="#">Expand/Collapse</a>	
Patient Name			Medicaid No.			Patient Control No.			Subscriber Name		
Member No.			Payer Claim Control No.			Claim Payment Status					
Subscriber ID			Claim Start Date			# Service Lines					
Patient Responsibility											
Dates of Service	Service Payment No.	Revenue / Procedure Code	Charged	Allowed	Contractual Adjustments	Remarks	Non Covered	Deductible	Copay	Coinsurance	Paid

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:

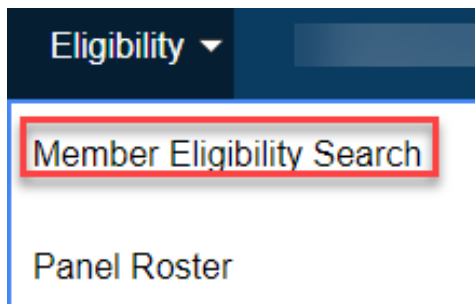
The "Expand/Collapse" link will expand or collapse this specific Claim Information section on this EOP associated with this provider.

The "Payer Claim Control No" will take you to the "Claim Status Detail" page

## 5. Patient Drop-down

### 5.1 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 Eligibility drop-down of the menu bar, select the Member Eligibility Search option

### "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 Fields

Search								Add Member
Eligible as of Date	DOB *	SSN	Medicaid ID# *	Medicaid No	First Name	Last Name *		
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete	
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete	
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete	
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete	
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete	

Include Ineligible Yes

#### 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)



## "Member Eligibility List" page - Active section

Required Fields

Active

Export

Printer Friendly Format

Order Entered	Eligible as of Date	Medicaid ID#	Medicaid No	DOB	Member Name	Lock-In	SSN	Effective Dates	Redetermination Date	Form A/B Indicator	Benefits	Employer No	Coverage	Network Name	Name	Location Name	Effective Date	Paid Thru Date

1

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 location name link will navigate you to the Provider Location Detail page

### Please Note:

The ["Export"](#) 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	Medicaid ID#	Medicaid No	DOB	Member Name	Lock-In	SSN	Effective Dates	Redetermination Date	Form A/B Indicator	

### Step 3

Select the Member name link



## Member Detail

The screenshot shows a web interface for 'Member Detail'. At the top right, there are links: 'View Claims', 'View Provider Directory', and 'View Authorizations'. The main content area lists various fields for member information, each followed by a redacted value (represented by a grey box). The fields are: Name, Medicaid ID#, Member Reference No, Medicaid No, Medicare No, Your Care Coordination Team, SSN, DOB, Gender, Race, Race Ethnicity Code, Address, Home Phone, Work Phone, Language 1, Language 2, Preferred Language, Email, Risk Score, and Risk Level.

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)

**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

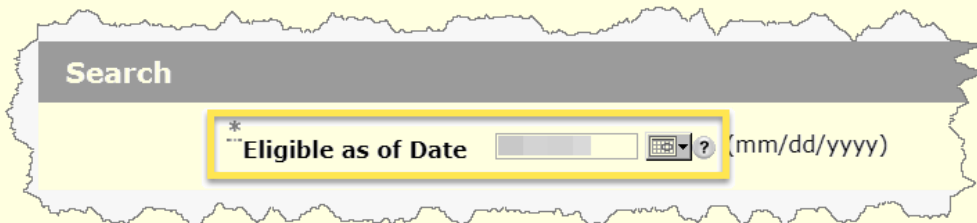
**Member Contacts section** - In this section you will find any contacts assigned to the members record (for example care coordinator, pharmacy location lock-in, controlled substance provider lock-in, emergency room location lock-in)

**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.

A screenshot of a web interface showing a search bar with the word "Search" in a grey box. Below it, a date selection field is highlighted with a yellow border. The field contains the text "Eligible as of Date" followed by a calendar icon, a dropdown arrow, and a question mark icon. To the right of the field is a placeholder text "(mm/dd/yyyy)".

## "Member Detail" page - Family Section

Family			
Member Name	Lock-In ?	Relationship	Medicaid ID#
▶ [Redacted]			

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)

### 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

	<a href="#">View Claims</a>	<a href="#">View Provider Directory</a>	<a href="#">View Authorizations</a>
Name	[Redacted]		
Medicaid ID#	[Redacted]		
Member Reference No	[Redacted]		
Medicaid No	[Redacted]		
Medicare No	[Redacted]		
Your Care Coordination Team	[Redacted]		
SSN	[Redacted]		
DOB	[Redacted]		
Gender	[Redacted]		
Race	[Redacted]		
Race Ethnicity Code	[Redacted]		
Address	[Redacted]		
Home Phone	[Redacted]		
Work Phone	[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

		<a href="#">View Claims</a>	<a href="#">View Provider Directory</a>	<a href="#">View Authorizations</a>
Name				
Medicaid ID#				
Member Reference No				
Medicaid No				

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](#).

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

**[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

**[View Provider Directory](#)** - this link will take you to the Provider Directory

**[View Authorizations](#)**- this link will take you to the members Prior Authorizations page

## "Member Detail" page - Eligibility Information section

Eligibility Information							<a href="#">View Eligibility History</a>
Benefits	Policy Benefit No	Coverage	Effective Date	Expiration Date	Redetermination Date	Form A/B Indicator	Paid Thru Date

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 Benefits will identify the members benefit plan.

### 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

Member Eligibility History						
Member Name: <input type="text"/>						
This page displays the member eligibility history for a specific member.						
Member Eligibility						
Benefit Plan	Medical ID#	Employer Name	Employer No	Effective Date	Expiration Date	
<a href="#">View Detail</a>						
<a href="#">View Detail</a>						
<a href="#">View Detail</a>						
<a href="#">View Detail</a>						

1

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

Primary Care Physician							
Care Management Type	Name	Location Name	Coverage	Provider Type	Network Name	Effective Date	Expiration Date

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 ▾	
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	Employee ID No	Policy No
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
As mentioned previously, in the "Pending/Open Request" section you will find any requests for the member that are currently pending review/approval			

## "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									

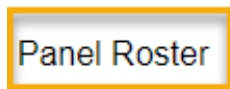
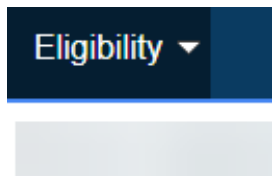
Each member in the "Ineligible" section of the "Member Eligibility List" page will have one link available  
The Member name link will navigate you to the Member Detail page

### Please Note:

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

## 5.2 Panel Roster feature

Follow the steps below to search and view your current Panel Roster/report.



### Step 1

From the Eligibility drop-down of the menu bar, select the Panel Roster option

## "Panel Roster" page - Search section

### Panel Roster

This page enables you to view a list of members currently assigned to a provider as primary care physician (PCP).

**Select a Provider**

1

Name

Show Full Roster ☐

Assigned as of Date  (mm/dd/yyyy)

**Member Information**

To Search for a specific member, enter the Member information in any of the fields provided.

2

Last Name

First Name

Medicaid ID#  (123456789)

Medicaid No

Line of Business

Intervention Code

DOB  (mm/dd/yyyy)

## Step 2

Search for member assignments

- 1 By provider assignment information and/or
- 2 Narrowing your return of information by the specific member

## "Panel Roster" page - Results section

Member(s) as of																	Export	Download PDF	
Name ?	PCP Effective Dates	Location Name ?	Redetermination Date	Form A/B Indicator ?	Member Name	Medicaid ID#	Medicaid No	Line Of Business Name ?	SSN ?	DOB ?	Gender	Relationship	Benefits	Language Code	Address	Home Phone	Other Coverage	Risk Score	Risk Level

After entering appropriate search criteria your results will return at the bottom of the "Panel Roster" page

The Member name link will take you to that members "[Member Detail](#)" page where you can find additional information regarding that member  
The Location Name link will take you to Provider Location Detail

### Please Note:

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

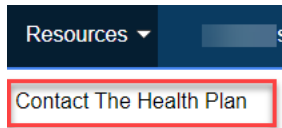
The "[Download PDF](#)" link found above the Results section will open a new browser window with the content on the page in a printer friendly version.

The Results page will show 10 results per page, to review other pages from your results (if applicable) select the page number link found below the results section.

## 6. Resources Drop-down

### 6.1 Contact the Health Plan feature

The "Contact the Health Plan" feature will allow you to submit a secure message to customer service. Follow the steps below to complete this process.



Inbox

Document List

Diagnosis List

Procedure List

Provider List

ProviderLink User Guide

#### Step 1

From the Resources drop-down of the menu bar, select the Contact the Health Plan option

### "Contact The Health Plan" page - Message Type

A screenshot of the 'Contact The Health Plan' page. The page has a light gray background with a dark gray header bar containing the title 'Contact The Health Plan'. Below the header, there is a paragraph of text: 'This page enables you to send secure messages to the health plan. Select the type of inquiry from desired, add an attachment, claim, member or provider record to your message. Clicking submit'. Below this text is a form section titled 'Message' in a dark gray box. The form contains several fields: 'Your Name' with a text input field, 'Message Type' with a dropdown menu, and 'Attachment' with a text input field. A yellow callout bubble with the number '2' points to the 'Message Type' dropdown. The dropdown menu is open, showing a list of options: 'Authorization Inquiry', 'Authorization Inquiry', 'Claim Status / Inquiry', and 'Eligibility Inquiry'. The first two options are highlighted in gray.

#### Step 2



Select the most appropriate Message Type, this will help ensure your message will be routed to the appropriate team to help with resolution

## "Contact The Health Plan" page - Attachment section

Your Name [Redacted]

\* Message Type Authorization Inquiry ▼ ?

**Attachment** ?

3 [Upload/Edit](#) [View](#) [Clear](#)

[Add Another Attachment](#)

Workgroup ID

### Step 3

If you need to include attachments, select the Upload/Edit link  
If no attachments are necessary skip to step 7

### Please Note:

If you need to add multiple attachments select the "Add Another Attachment" button to add additional Attachment section(s) to Upload additional attachments

## "Upload Attachment" page - Choose File button

**Upload Attachment**

This page allows you to browse and upload a file from your hard drive. Click browse to locate & upload successfully.

**Upload**

4 **File Name** Choose File No file chosen

### Step 4

Select the Choose File button to search for the appropriate attachment on your computer

## "Upload Attachment" page - Windows Explorer popup

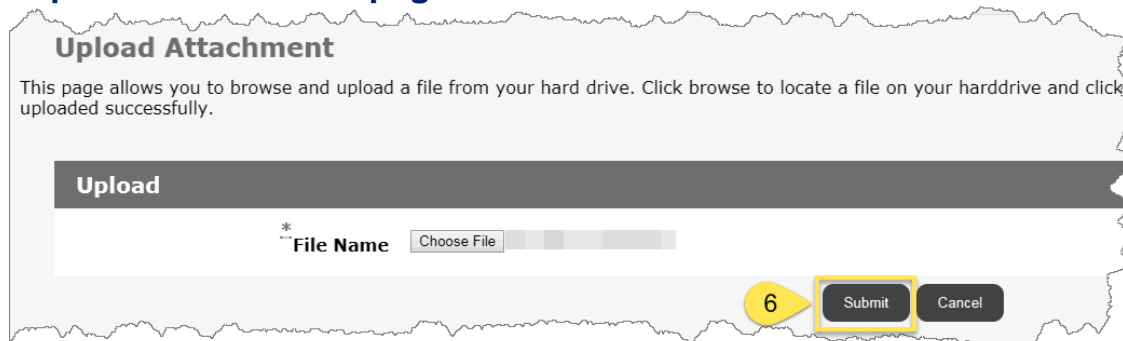


A windows browser window will pop-up on your desktop

### Step 5

Search for the appropriate attachment and select the "Open" button

## "Upload Attachment" page - Submit button



The selected document should now appear to the right of the "Choose File" button


### Step 6


Select the "Submit" button

**Please Note:**

You will now be returned to the Contact the Health Plan secure message form and should see the attachment name included in the Attachment section  
If additional attachments are necessary select the "Add Another Attachment" button and repeat steps 3-6 from the new Attachment field added

## "Contact The Health Plan" page - Additional Content section

Claim No  [Clear Claim](#)

Member No  [Clear Member](#)

Description & Contact Information

[Submit](#) [Cancel](#)

### Step 7

Add additional content like Claim #, Member ID#, and/or Provider ID# if applicable

**Claim No** magnifying glass icon will open the "Claims Status List"

**Member No** magnifying glass icon will open the "Member Eligibility Search" page

### Please Note:

After selecting one of the magnifying glass Icons you will be navigated to a "List" or "Search" page to find the appropriate record to link to this secure message.

Once you have searched for the appropriate record choose the "Select" link to associate the record to your secure message. After selecting the appropriate record you will be navigated back to the Contact the Health Plan page where you can complete any other required fields before submitting your secure message.

## "Contact The Health Plan" page - Description section

Description & Contact Information

Submit

Cancel

### Step 8

Enter appropriate description for your question/issue in the "Description & Contact Information" text box, please be as detailed as possible

## "Contact The Health Plan" page - Submit button

Description & Contact Information

Submit

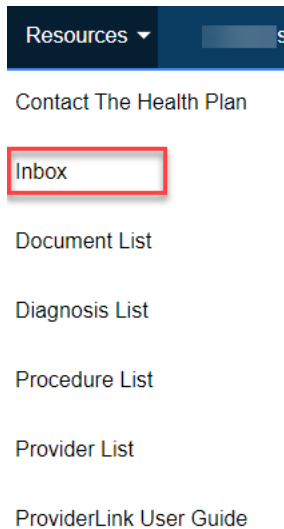
Cancel

### Step 9

Select the "Submit" button

## 6.2 Inbox feature

The Inbox feature will allow you to see all available secure messages. You will find all active/deleted and sent messages associated with your user account.



### Step 1

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

## "Inbox" page - Search section

A screenshot of the 'Inbox' page's search section. The page has a light gray background. At the top left, the word 'Inbox' is displayed. Below it, a paragraph of text explains the page's functionality: 'This page allows you to view a list of messages in your inbox. Click the message subject link to display the actual message. To narrow the list, enter a subject and/or date range and click search. To view a list of sent messages, click the sent messages link. To view a list of deleted messages, click the deleted messages link. To create a new message, click the new message link. To view the list of defined contacts, click the view contacts link. To delete a message click its delete link.' To the right of this text is a small link that says '\*Required Fields'. Below the text is a search bar with a dark gray header containing the word 'Search' and two links: 'Sent Items' and 'Deleted Items'. The search bar has two input fields: 'Subject' and 'Date Range'. The 'Date Range' field includes a date picker icon and a 'to' label. Below the input fields is a 'Search' button.

You will now find yourself on the Inbox page

The top of the page will have available search fields you can use to narrow the return of results

### Please Note:

When initially navigating to the "Inbox" page your results will show all current/active messages (read or unread), use the quick links below to review deleted or sent secure messages.

## "Inbox" page - Search section links

Search

Sent Items Deleted Items

Subject

Date Range  to  (mm/dd/yyyy)

Search

"Sent Items" link will navigate you to the "Sent" page where you can search/view all sent secure messages

"Deleted Items" link will navigate you to the "Deleted" page where you can search/view all deleted secure messages

## "Inbox" page - Results section

Results			
Entry	User	Subject	
			08/13/2017 05:00:28 PM Delete
			08/13/2017 04:59:46 PM Delete
			08/13/2017 04:59:18 PM Delete

### Subject link

Select the message "Subject" link to open the "View Message" page and review additional detail for this secure message

Select the "Delete" link to delete the secure message from your inbox view, the message will now only be available from the "Deleted Items" view

### Please Note:

If you ever want to return a "Deleted" item to your inbox view you can complete that through the "Deleted Items" page. On the "Deleted" page you will find a Back To Inbox link.

Deleting a secure message that is on the "Deleted" page will permanently delete the message and you will no longer be able to retrieve this secure message.

## "View Message" page

**View Message**

This page allows you to view the message and reply to its sender. Click reply all to reply to everyone the message was sent to. Click forward to send the message to another party. Click delete to remove the message from the Inbox list. To view any message attachments, click the view attachment link.

Required Fields

**Subject Information**

From  
To  
Date  
Subject  
Message

**Attachments**

File Name	Download
	Delete

After selecting the "Subject" link from the Inbox/Sent/Deleted pages you will be navigated to the "View Message" page. Review additional detail from the secure message (and retrieve any attachments) from this page.

### Please Note:

You can select the "Delete" button to delete the secure message or select the Inbox/Sent/Deleted link in the bread crumbs to return to the previous page

## 6.3 Document List feature

Resources

Contact The Health Plan

Inbox

Document List

Diagnosis List

Procedure List

Provider List

ProviderLink User Guide

Care Managers are expected to upload IPoCs here

### Step 1

From the Tools & Resources drop-down of the menu bar, select the Document List option, select search, and click on paper icon.

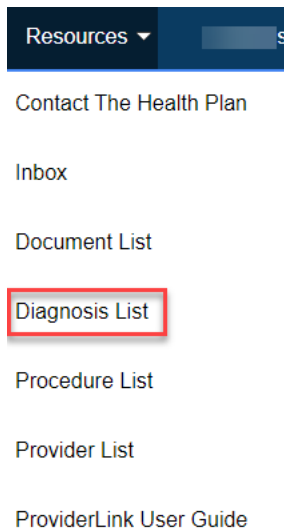
Note: you can enter field then select search to narrow down the results

**Results**

Title	Filename /URL	Date	File Detail Category	Description	Location Name	State

## 6.4 Diagnosis List feature

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



### Step 1

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

## "Diagnosis List" page - Search section

A screenshot of the 'Diagnosis List' search section. It features a blue header bar with the word 'Search' in white. Below the header, there are three input fields: 'Code Set' (a dropdown menu), 'Description' (a text box), and 'Code' (a text box). Each input field has a small question mark icon to its right. At the bottom right of the section, there is a dark blue button with the word 'Search' in white.

### Step 2

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



## "Diagnosis List" page - Results section

Results <span>Export</span>		
Code	Code Set	Description
A000	ICD10	Cholera due to <i>Vibrio cholerae</i> 01, biovar <i>cholerae</i>
A001	ICD10	Cholera due to <i>Vibrio cholerae</i> 01, biovar <i>eltor</i>
A009	ICD10	Cholera, unspecified
A0100	ICD10	Typhoid fever, unspecified
A0101	ICD10	Typhoid meningitis

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

### Please Note:

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

## 6.5 Procedure List feature

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



Contact The Health Plan

Inbox

Document List

Diagnosis List

Procedure List

Provider List

ProviderLink User Guide

### Step 1

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

## "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.

#### 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

## "Procedure List" page - Results section

Results <span>Export</span>		
Code ▼	Procedure Code Description	Code Set
0001	TOTAL CHARGES	
0001A	Immunization administration by intramuscular injection of severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) (Coronavirus disease [COVID-19]) vaccine, mRNA-LNP, spike protein, preservative free, 30 mcg/0.3mL dosage, diluent reconstituted, first dose	
0001F	HEART FAILURE ASSESSED	
0001T	ENDOVASCULAR REPAIR, INFRARENAL ABDOMINAL AORTIC A	
0001U	Red blood cell antigen typing, DNA, human erythrocyte antigen gene analysis of 35 antigens from 11 blood groups, utilizing whole blood, common RBC alleles reported	

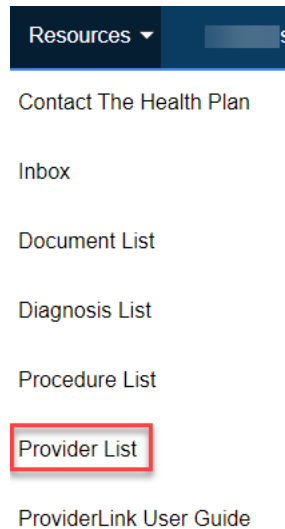
Data from your search request will produce at the bottom of the page in the "Results" section

### Please Note:

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

## 6.6 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 Resources drop-down of the menu bar, select the Provider List option

## "Provider List" page - Search section

The screenshot shows the 'Provider List' page. At the top, the title 'Provider List' is displayed. Below the title, a paragraph explains the page's function: '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'. Below this text is a search section with a grey header bar containing the word 'Search' in white. A yellow callout bubble with the number '2' points to this header. The search section contains several input fields and dropdown menus, each with a label and a question mark icon for help: 'Provider Last Name', 'First Name', 'Provider No', 'Provider Type', 'Specialty' (with a dropdown menu showing 'Select a Provider Type to Populate List'), 'Network Name', 'Affiliation Type', 'Par Code', 'In Directory', 'City', 'State', and 'Contact Phone'. A 'Search' button is located at the bottom right of the search section.

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

### Please Note:

The "Export" 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

Results								
Provider No	Provider Id	Name	Provider Type	Specialty	Network Name	Location Address	Contact Phone	Update Date

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

Results								
Provider No	Provider Id	Name	Provider Type	Specialty	Network Name	Location Address	Contact Phone	Update Date

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

## "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. The view panel roster link allows you to see a list of members who have selected this provider as PCP. Click any add links to add additional information for subject area, or click any existing information link to edit that information. Clicking submit saves the information. \*Required Fields

General Information		<a href="#">View Panel Roster</a>
Provider Last Name/ Organization Name		
First Name		
Middle Name		
Suffix		
Additional Name		

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.

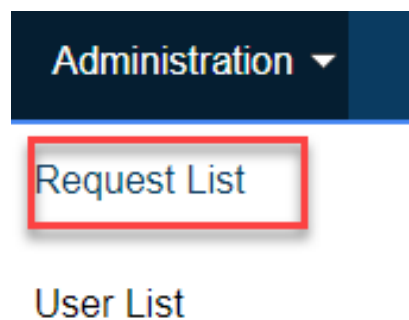
## 7. Administration Drop-down

### 7.1 Request List feature

**Please Note:**

This feature is only available for Provider Administrator users

The Request List feature will allow you to review (and approve/deny) portal self-registration requests. When available, self-registration requests will queue into this location based on your security rights.



### Step 1

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

## "Request List" page - Search section

### Step 2

If necessary search for a specific request 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, since there are some pre-filters set for Request Status of "Pending - New" and Current Reviewer "Provider"

## "Request List" page - Results section

Results						Export
Request ID	Request Status	Provider Name	Current Reviewer	Date Submitted	Date Last Updated	

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

## "Request List" page - Results section - Request ID link

Results						Export
Request ID	Request Status	Provider Name	Current Reviewer	Date Submitted	Date Last Updated	

### Step 3

Select the "Request ID" link to view Provider Registration Review.

Home > Request List

### Provider Registration Review

**User Type**

Are you a Provider? ☐

**How may we contact you?**

Phone

Email

Fax

**Provider Information**

Last Name

First Name

Provider Type

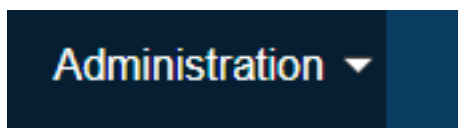
## 7.2 User List feature

### Please Note:

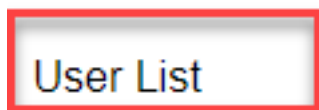
This feature is only available for Provider Administrator users

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



Request List



## Step 1

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

## "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 last name, username, page from where you can edit the user information, reset the user's password, or delete the user.

#### Search

First Name  ?

Last Name  ?

Username

User Role

Office

Locked  No ?

Deleted  No ?

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 happen

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 account 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)



## User List page - Results section

Results								Export	Add User
Name	Username	Office	Role	Is CPA User?	Locked	Lockout Time	Deleted		

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

### Please Note:

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

## Add a user account

Results								Export	Add User
Name	Username	Office	Role	Is CPA User?	Locked	Lockout Time	Deleted		

### Step 3

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

## "User Type" page

### User Information

\* User Type

< Back

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**

Last Name

Search

**Results**

Select	Name	Role	Title/Pos	Phone

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. Click the edit link if

**Provider Type**

\*

Last Name

\*

First Name

Middle Initial

Prov Employee No

Telephone

Fax

Email Address

Title/Position

Submit

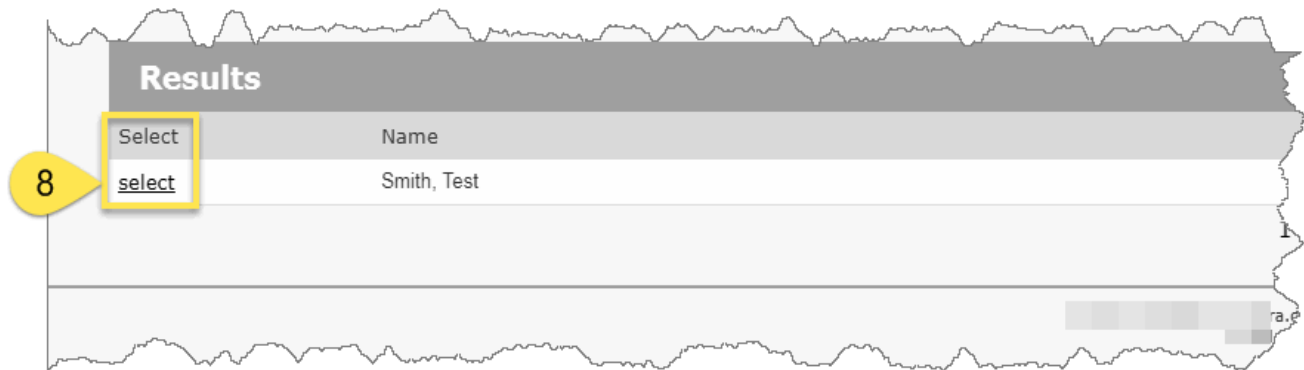
### Step 7

Enter Required records and select the "Submit" button

### Please Note:

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

### "Provider Employee List" page - select link



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

The screenshot shows a form titled "User Information" with a blue header. The form contains the following fields, each with a red asterisk indicating it is required:

- Last Name (text input)
- First Name (text input)
- Middle Name (text input)
- User Role (dropdown menu)
- Username (text input)
- Password (text input with a help icon)
- Confirm Password (text input)
- Password Question 1 (dropdown menu)
- Password Answer 1 (text input)
- Email (text input with a help icon)

### 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 \***

## Editing an existing user account

Results							
<a href="#">Export</a> <a href="#">Add User</a>							
Name	Username	Office	Role	Is CPA User?	Locked	Logout Time	Deleted

### Step 3

Select the "Username" 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	<a href="#">Reset Password</a> <a href="#">Edit User</a> <a href="#">Delete User</a>
Name	
Username	
Role	
Password Question 1	
Password Answer 1	

### 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

\*  
\*\*\* First Name  ?

Middle Name  ?

\*  
\*\*\* Last Name  ?

Username

\*  
\*\*\* User Role

Password Question 1

Password Answer 1

\*  
\*\*\* Email  ?

Office

\*  
\*\*\* Locked  ?

\*  
\*\*\* Deleted  ?

Verbose Level

#### Phone

Mobile Carrier

Mobile Phone Number  ?

### Step 5

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

## Deleting an existing user account

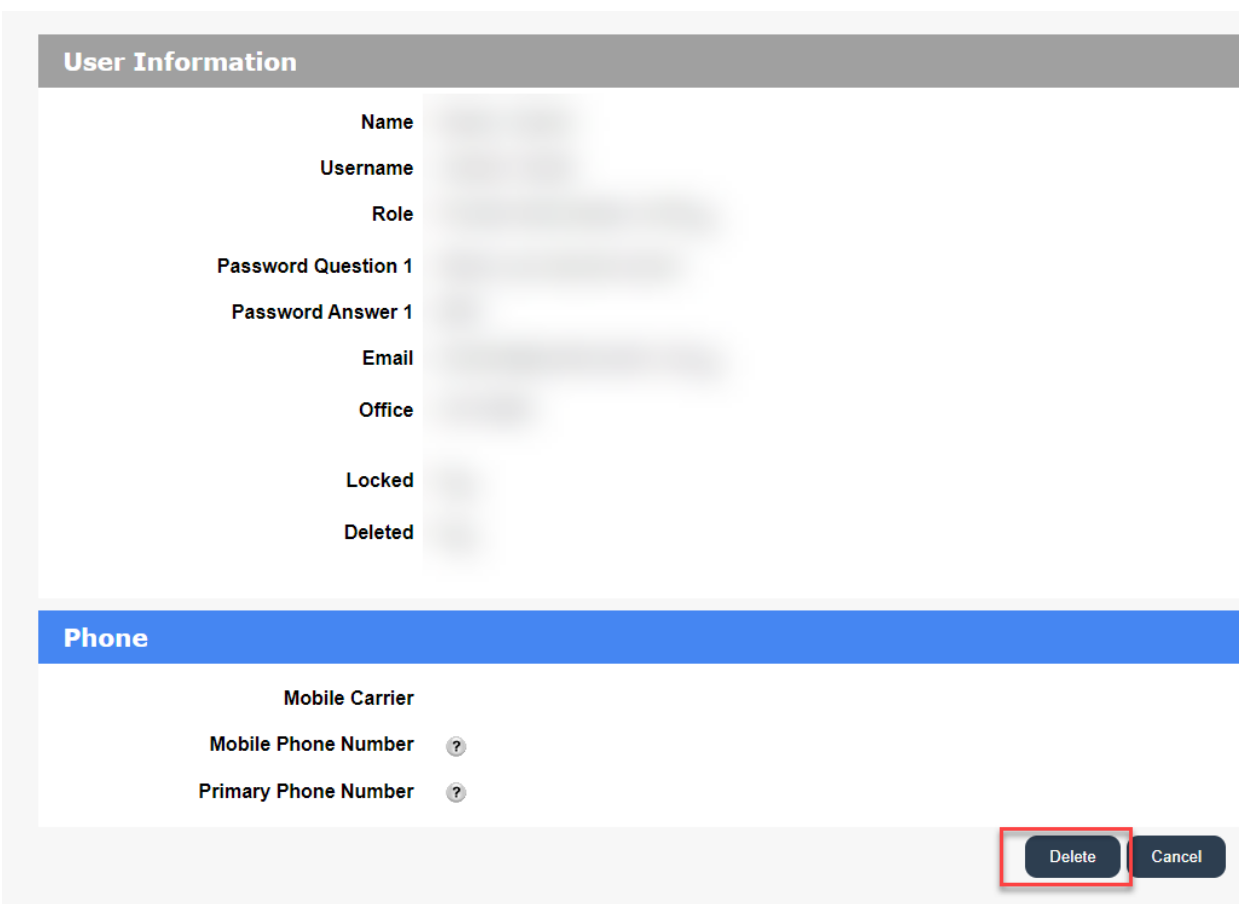


Results								Export	Add User
Name	Username	Office	Role	Is CPA User?	Locked	Lockout Time	Deleted		
							Deleted	Delete	
							Deleted	Delete	
							Deleted	Delete	

### Step 3

Select the "Delete" link

## "Delete User" page



### User Information

Name

Username

Role

Password Question 1

Password Answer 1

Email

Office

Locked

Deleted

### Phone

Mobile Carrier

Mobile Phone Number ?

Primary Phone Number ?

Delete Cancel

### 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.

## Send a user a temporary password

Results							
Name	Username	Office	Role	Is CPA User?	Locked	Logout Time	Deleted

### Step 3

Select the "Username" 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				
Username				
Role				
Password Question 1				
Password Answer 1				
Email				
Office				

### 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 can perform this effect if you click cancel.

#### Password Information

Password Question 1

Password Answer 1

Password Question 2

Password Answer 2

Password Question 3

Password Answer 3

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

## Unlocking an existing user account

Results								Export	Add User
Name	Username	Office	Role	is CPA User?	Locked	Lockout Time	Deleted		
								Delete	
								Delete	
								Delete	
								...	

### Step 3

Select the "Username" 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 Password	Unlock	Edit User	Delete User
Name /				
Username /				
Role /				
Password Question 1 /				
Password Answer 1 /				

### 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.

## 8. Account Portal 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)

Portal Account

### Step 1

From your menu bar, select the Portal Account option

## "User Profile" page

### Portal Account

Use this screen to update your portal account. Remember to select "submit" below to save your changes.

#### Personal Information

\* First Name  ?  
Middle Name  ?  
\* Last Name  ?

#### Change Password

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

Old Password   
Password  ?  
Confirm Password

### Step 2

Update appropriate text boxes with new content

## "User Profile" page - Submit button

### Preferences

#### Preference

Accept notification emails  
Accept Text Message Notification  
Allow health plan to login to the portal as yourself to better assist and support you.  
Receive Notification For Child Affiliation Authorizations  
Receive Notification For Child Affiliation Remittance Advice  
Receive Notification For Authorizations  
Receive Notification For Remittance Advice  
Receive notifications for new Documents loaded to the Portal

Submit

Cancel

### 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).