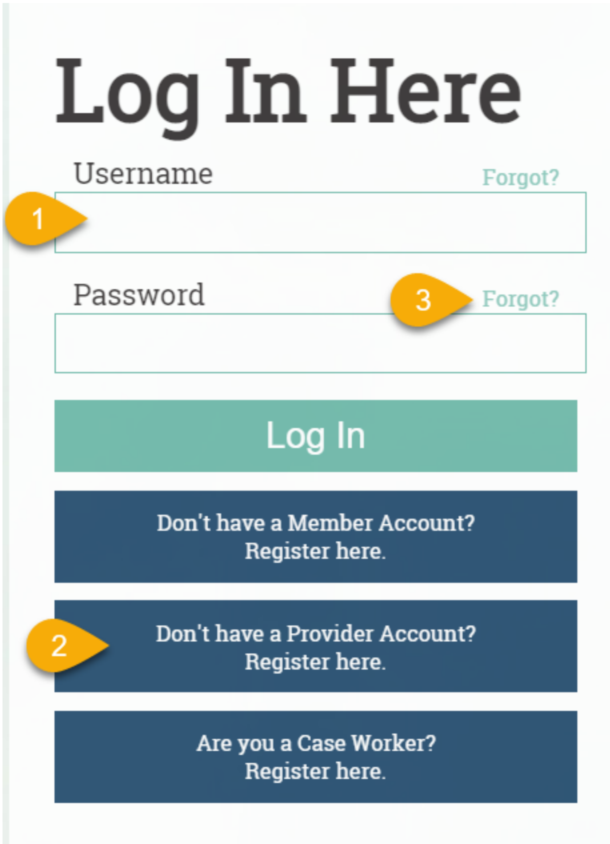
Provider Portal User Guide

Table of Contents

1. Login Page

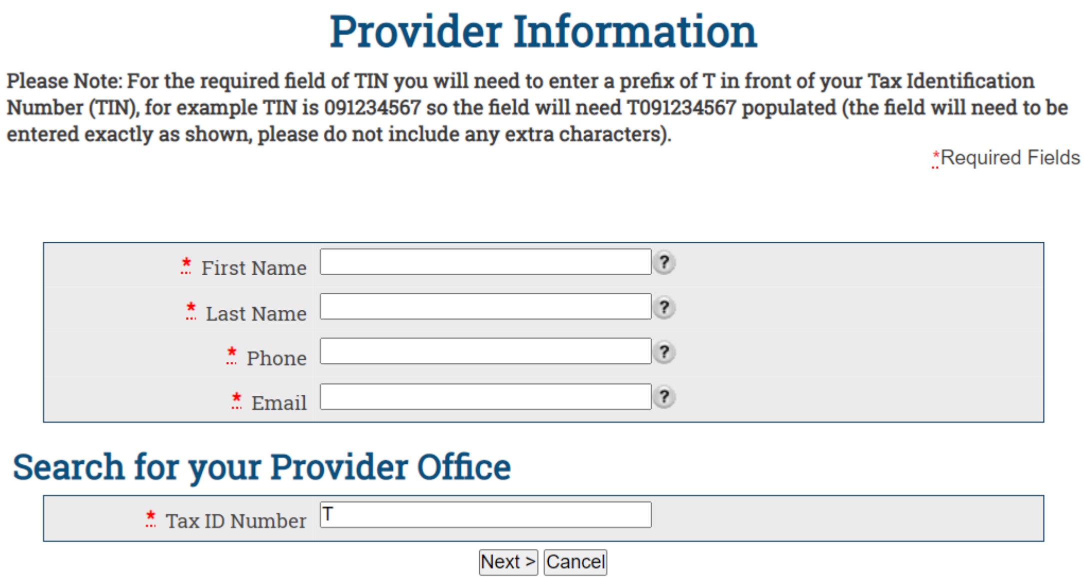


Please Note:
If you have not done so already (or you require additional access) follow the process within the ""Don’t have a Provider Account? Register here " to create a portal user account request.

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)



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

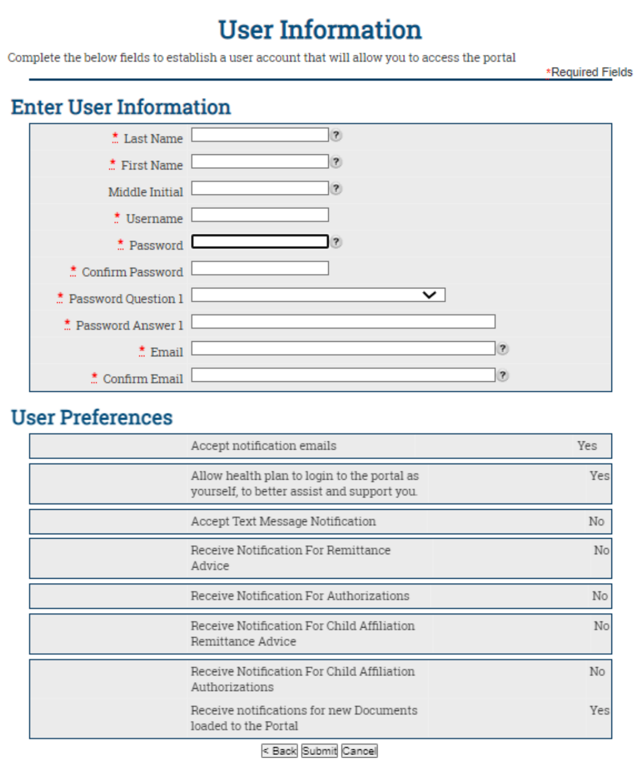
< Back | Next > | Cancel

© 2023 Evolent Health LLC. All rights reserved.

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

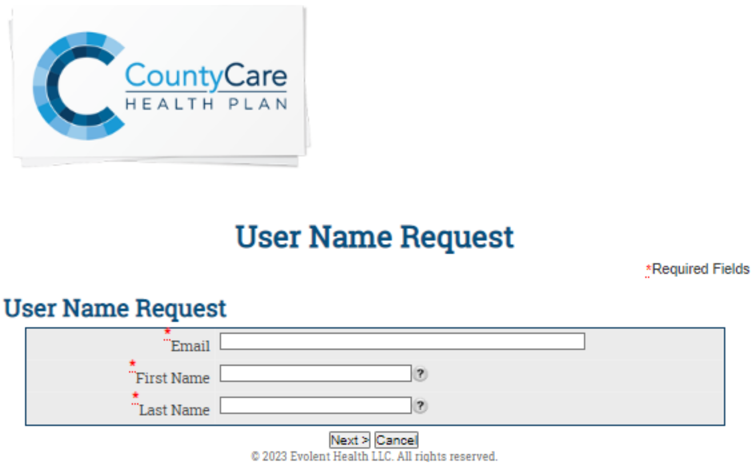
1.2 "Forgot?" link

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



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

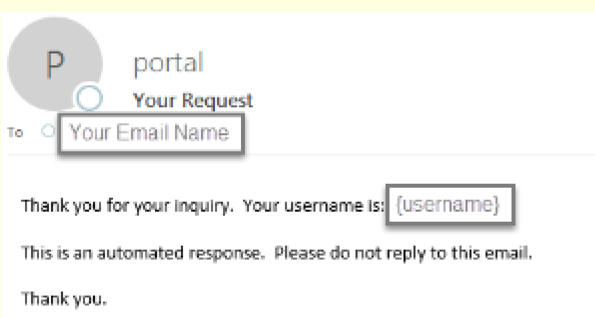
Once all fields are completed select the "Next" button to continue with the forgot your username process.

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

"User Name Request" page

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.

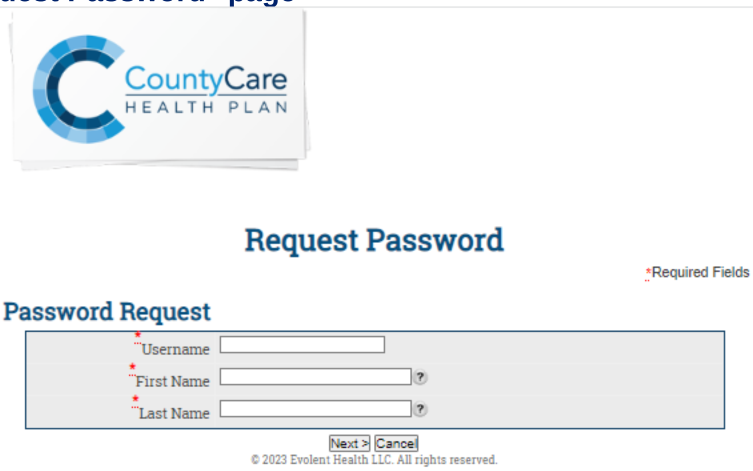
Please Note:
The "Send Username" button will re-direct you to the Login page. You will now want to check the email you have setup with this portal user account.
This is an example of the email you will receive.



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.

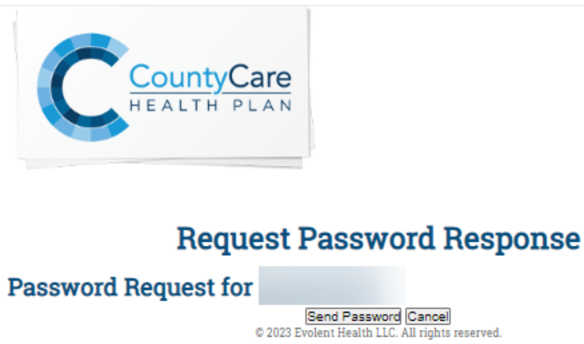
"Request Password" page



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.

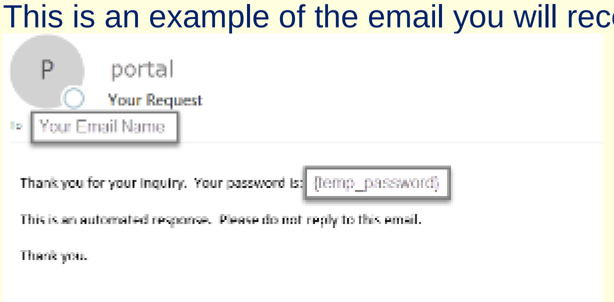
Please Note:
You will need to know your username in order to complete a request for a temporary password. You will also need to ensure all fields above match the current information on your portal user account information.

"Request Password Response" page

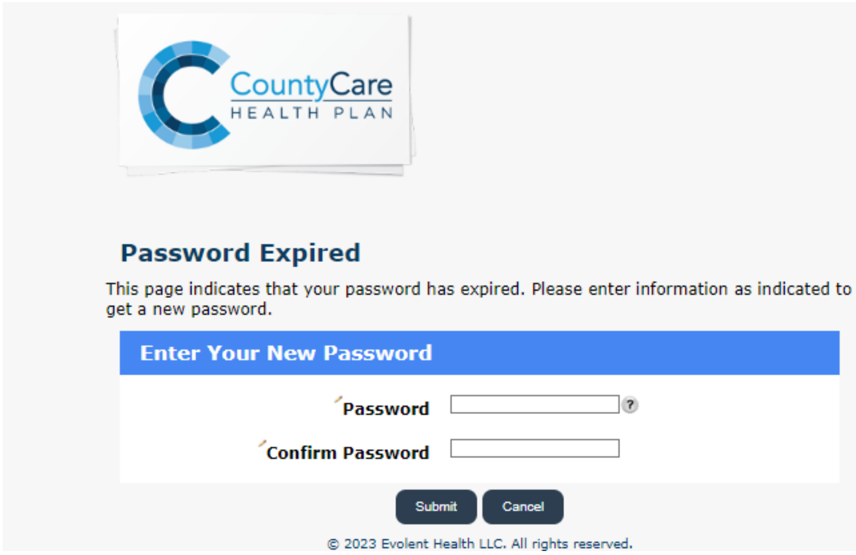


After selecting the "Next" button you will be navigated to the page below. To complete the request and have the website send a temporary password select the "Send Password" button.

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



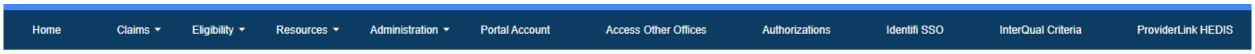
Upon your first log in after using the temporary password you will be directed to a "Password Expired" page. The password you received via email has now expired and the website is requiring you to setup a new password.
Enter your new password in the "Password" and "Confirm Password" text boxes and select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



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.

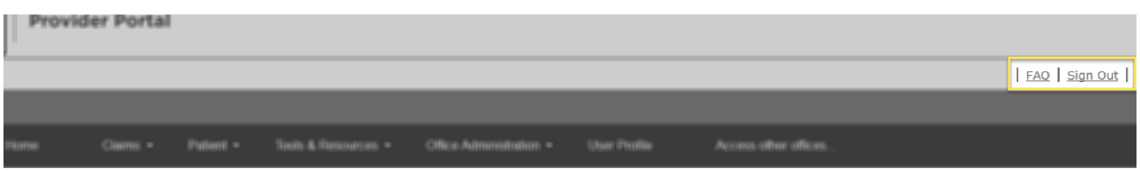
Drop-Down	Feature	Description
N/A	Home	Select this menu bar option to return to your portal Home Page
Claims	Claim Status List	Go here to search and review the status of claims we have on file associated with your security rights
Claims	Remittance Advice Search	Go here to search and review Remittance 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: • The members current benefit information • Status Indicators (suspension/disenrollment indicators and/or lock-in indicator) • Primary Care Physician assignment (PCP) • Contacts on file (to include Care Management team and lock-in locations if applicable) • Other Coverage / Coordination of Benefits • Redetermination Date • A/B Indicator • Risk Score • Risk Level Any Pending / Open Requests
Eligibility	Panel Roster	Go here to search and review your current panel roster / member assignments
Resources	Contact the Health Plan	• When available, go here to submit a secure message
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: • Search for current portal user accounts • Reset a users password • Unlock a users account • Delete a users account 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. • If you need additional NPI(s) associated to your account please contact your provider relations representative.
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.

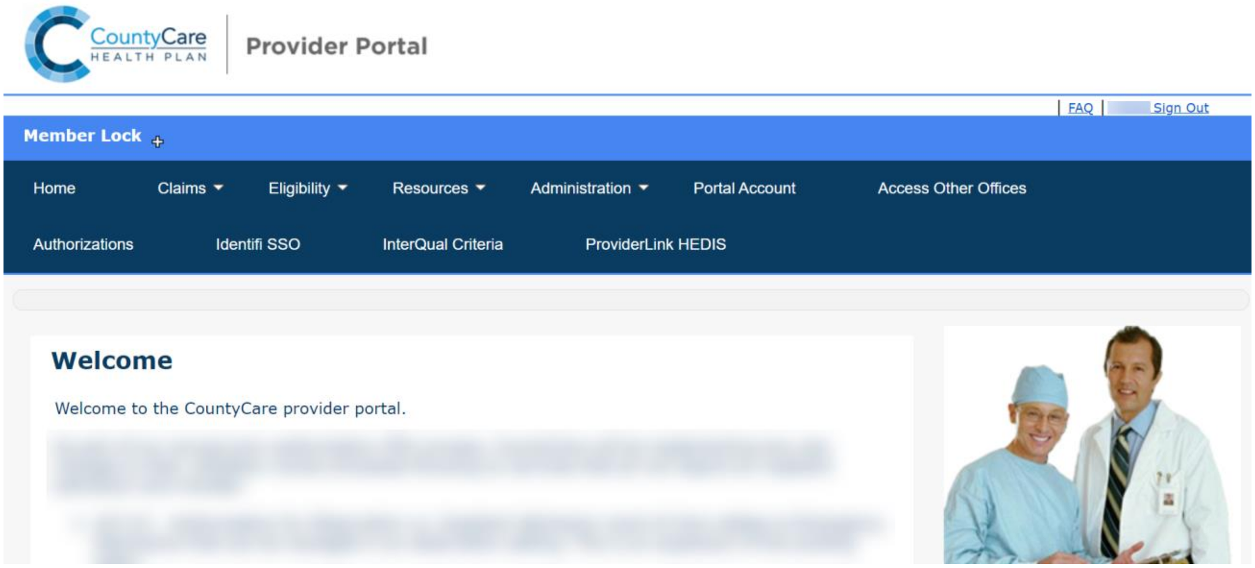
2.3 FAQ and Sign Out



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.

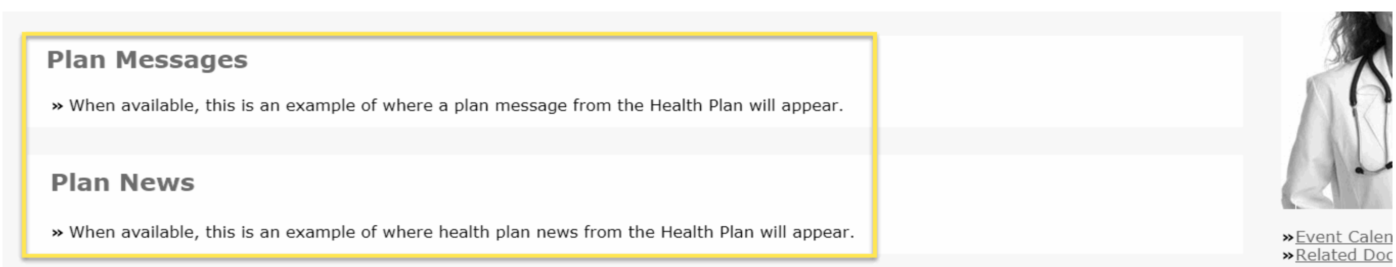
3. Home Page



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

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

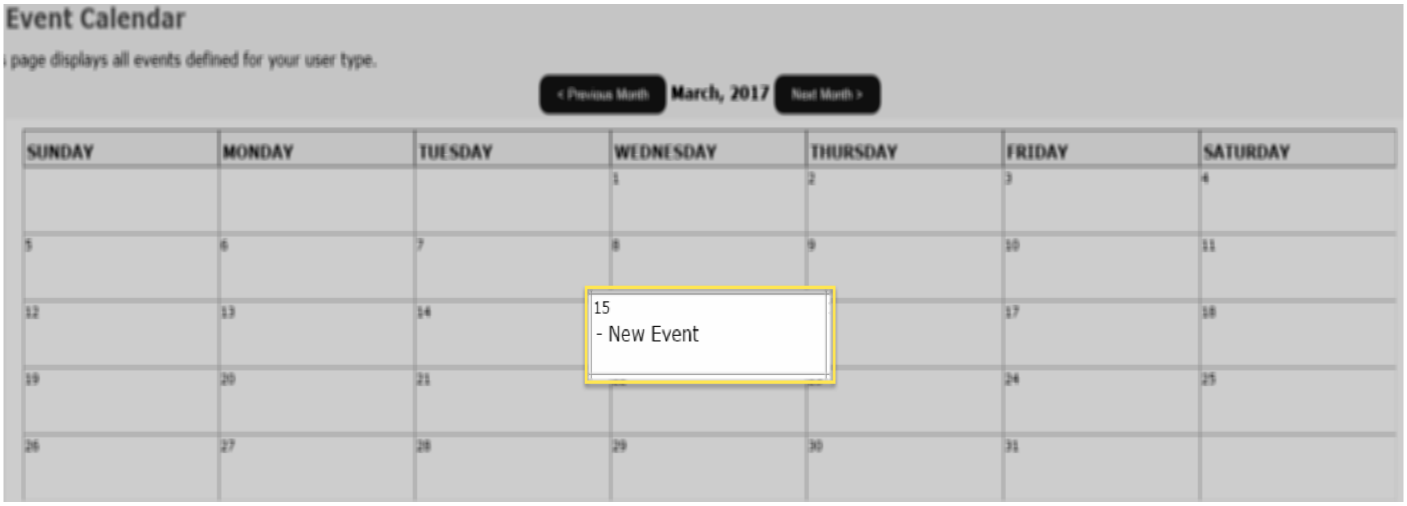
The Contact section on your Home page will identify customer service information should you need to contact us.

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.

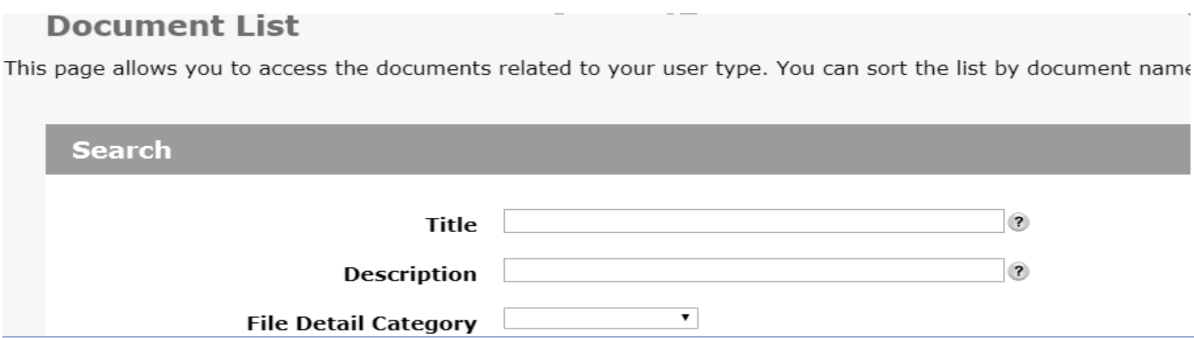
"Day Events" page

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



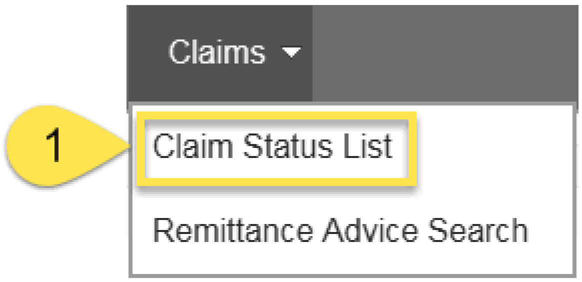
When you select the "Related Documents" link from your home page you will be directed to the "Document List" page.

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

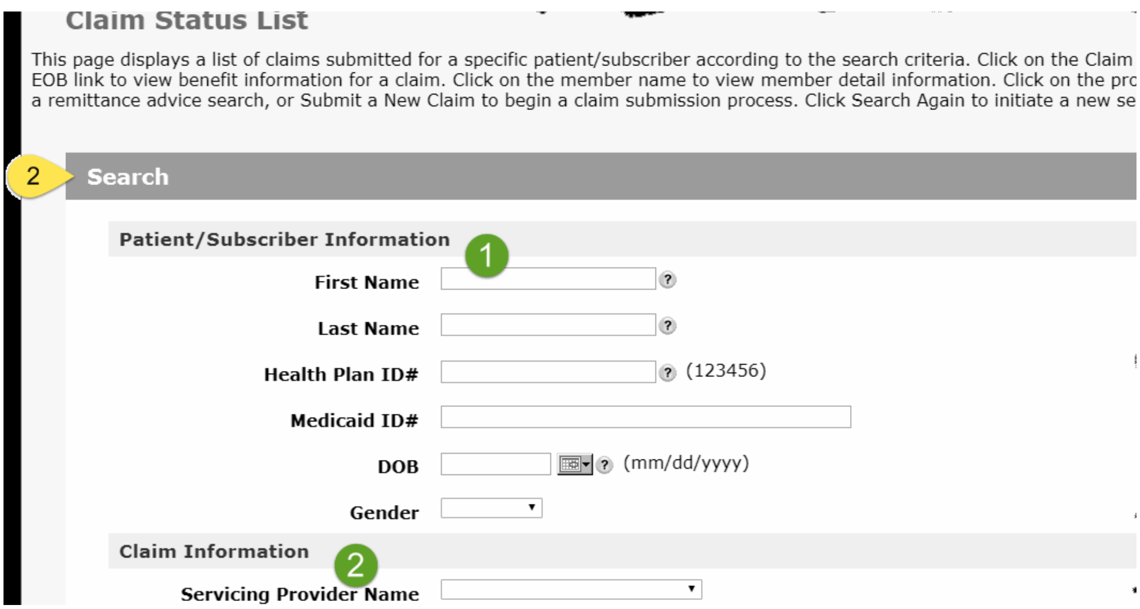
4.1 Claim Status List

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



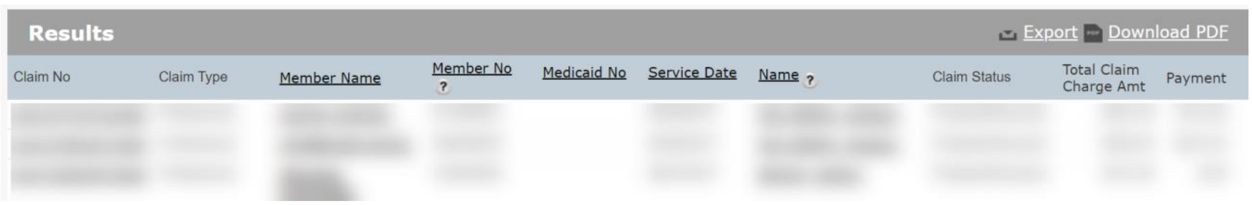
Step 2
Complete a search for claims by:

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.

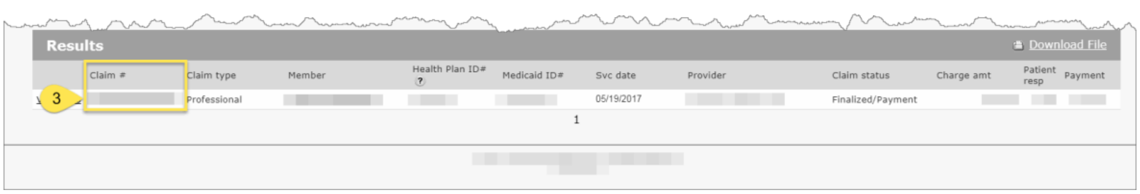
"Claim Status List" page - Results Section



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

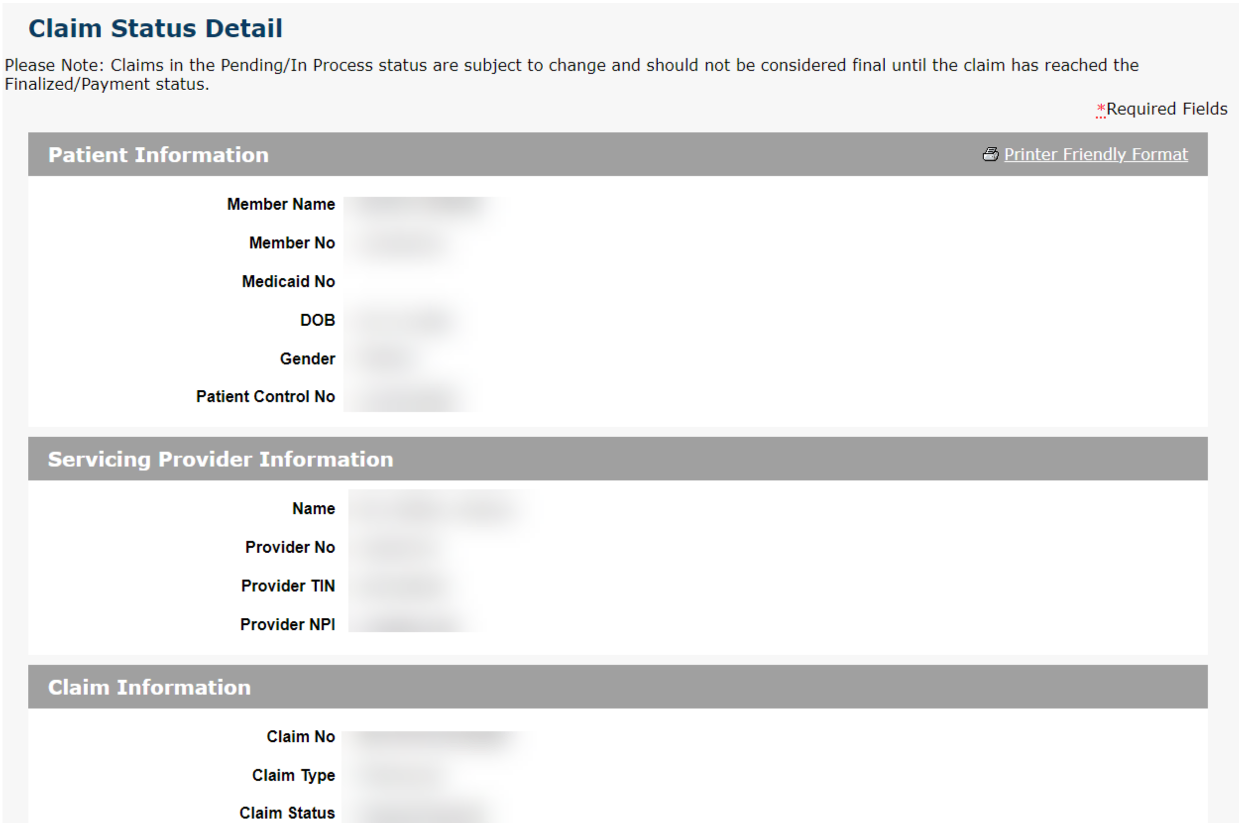
Please Note:
The "Download File" link found above the Results section will export the content listed to an excel spreadsheet.

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



Step 3
Select the "Claim #" link from your claims results section to open additional detail for that claim.

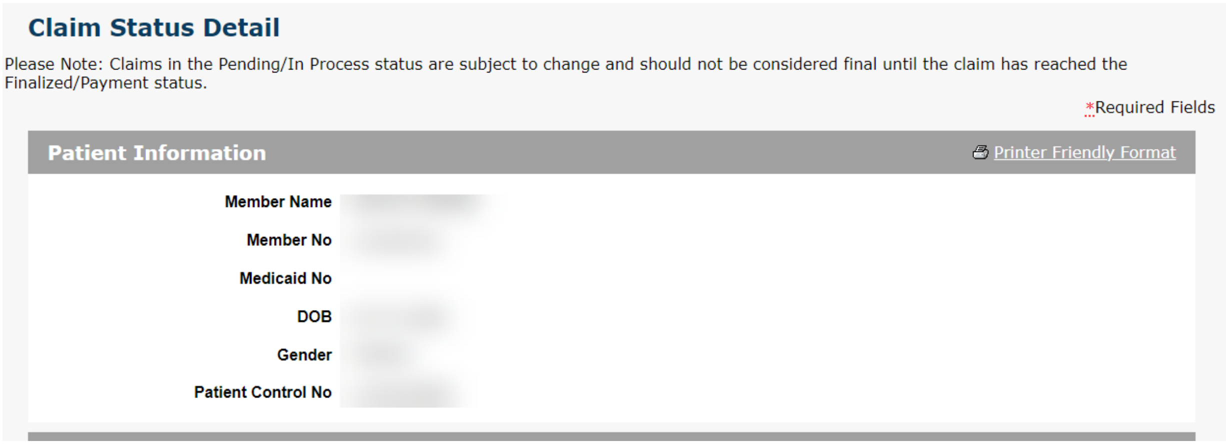
"Claim Status Detail" page



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

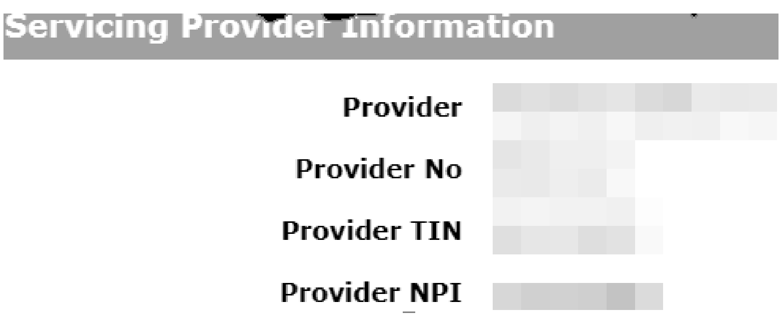
"Claim Status Detail" page - Patient Information section



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



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

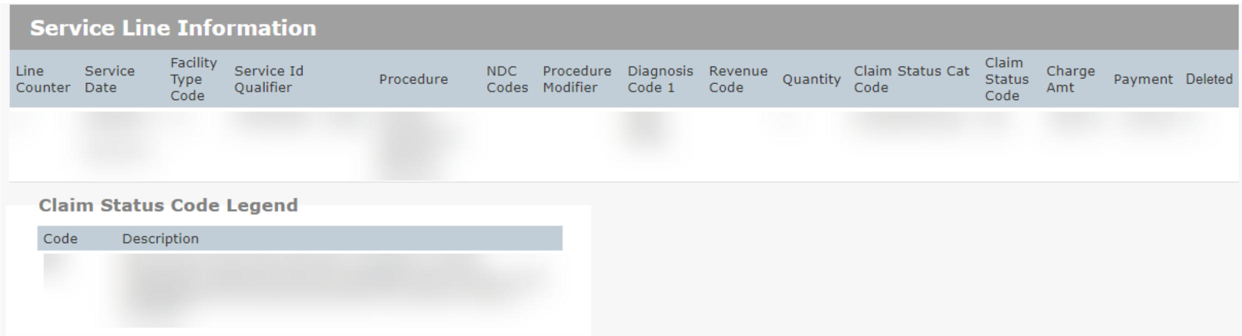
Payment Information View Payments

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

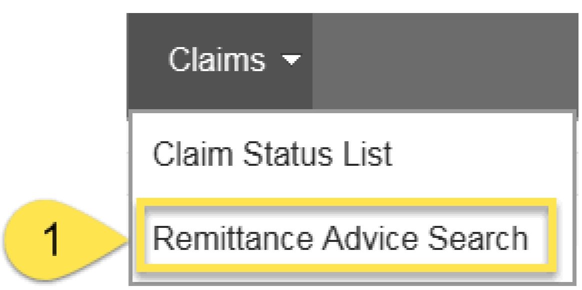


The Service Line Information section will return additional details of each service line submitted with this claim.

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.

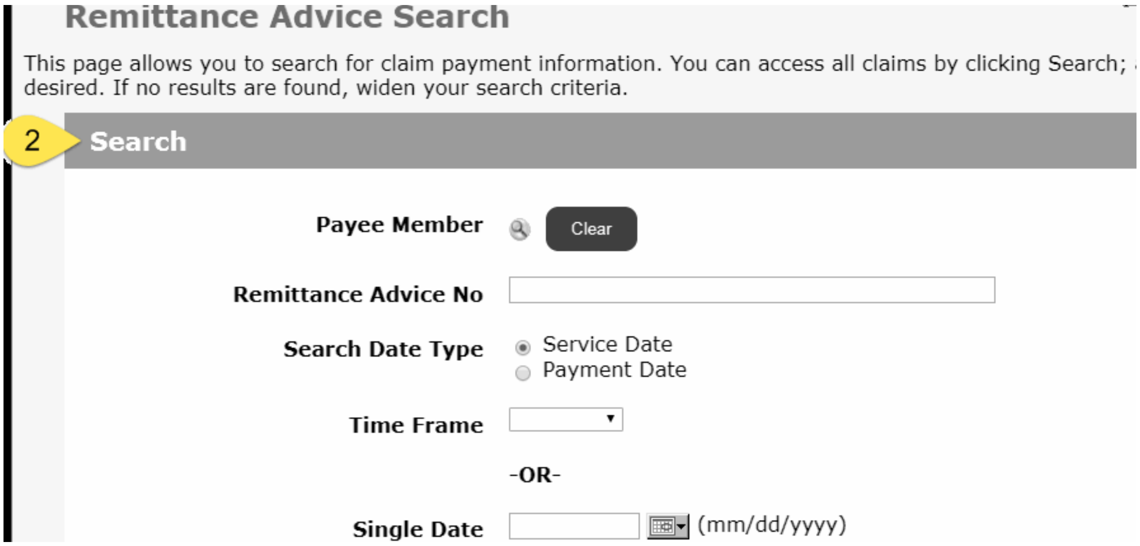
4.2 Remittance Advice Search feature

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.

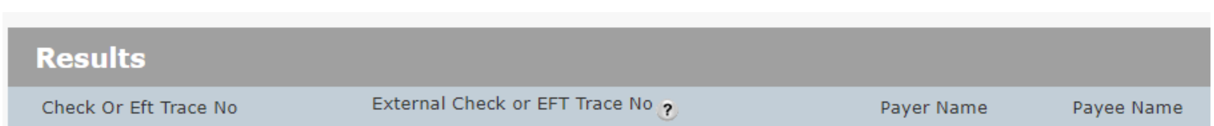
"Remittance Advice Search" page - Search section



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.

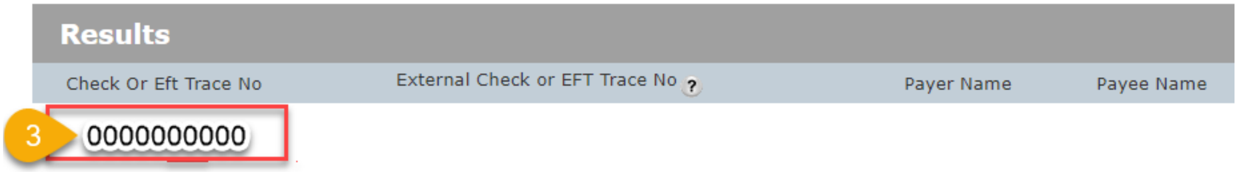
"Remittance Advice Search" page - Results section



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.

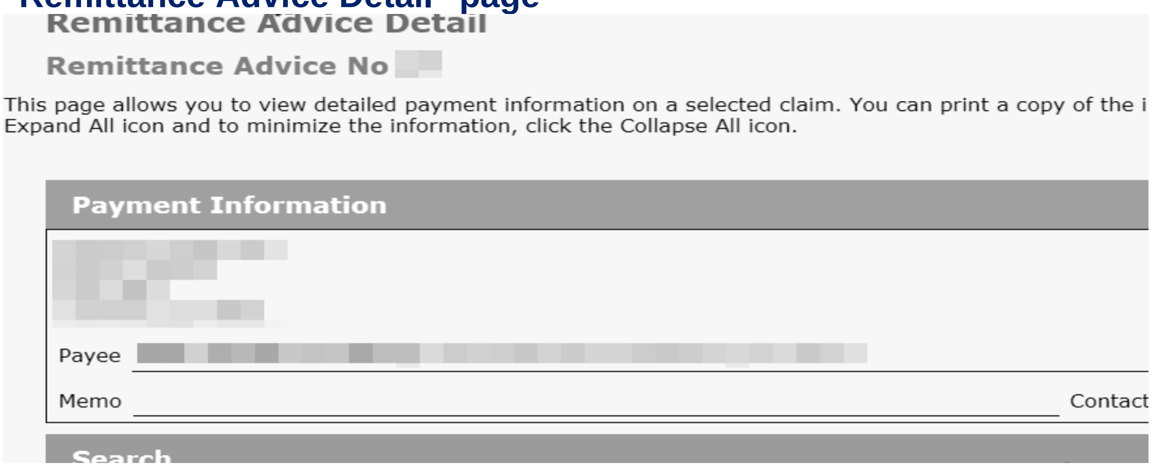
"Remittance Advice Search" page - Results section - Check or EFT Trace No link



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.

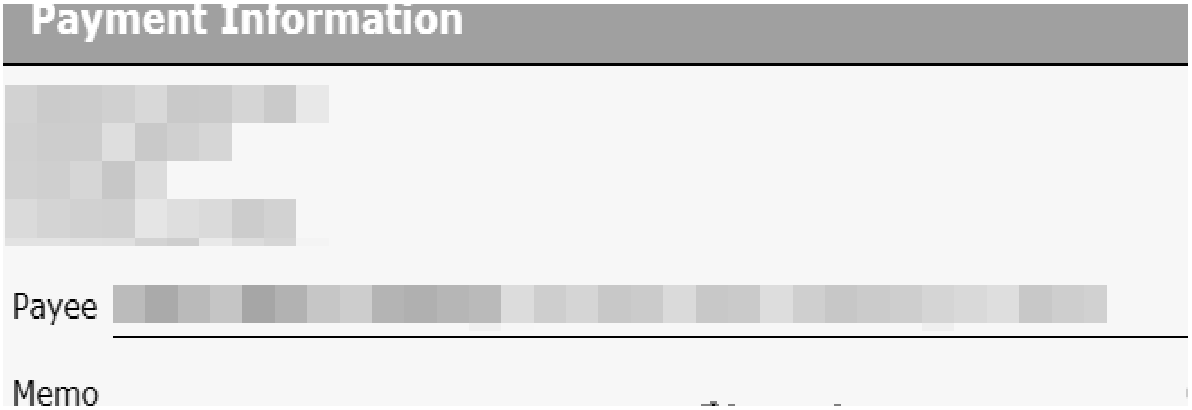
"Remittance Advice Detail" page



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

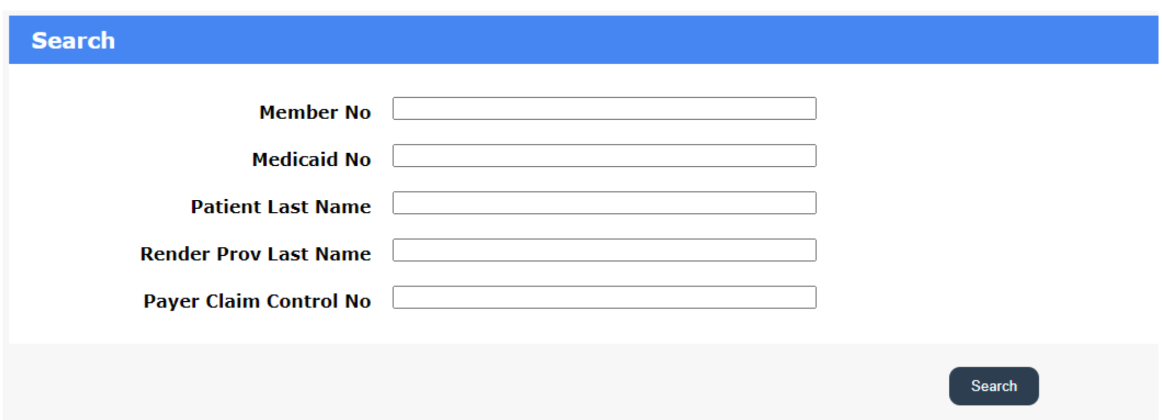
"Remittance Advice Detail" page - Payment Information



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.

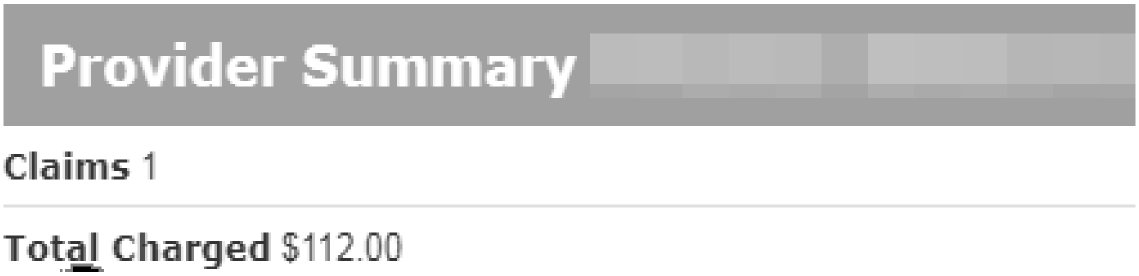
Please Note:
The "Printer Friendly Format" link will open a new browser window with the content on the page in a printer friendly version.
The "Expand All" link will expand all collapsed Provider and Claim information sections.
The "Collapse All" link will collapse all expanded Provider and Claim information sections.

"Remittance Advice Detail" page - Search section



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



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 - Claim Information section

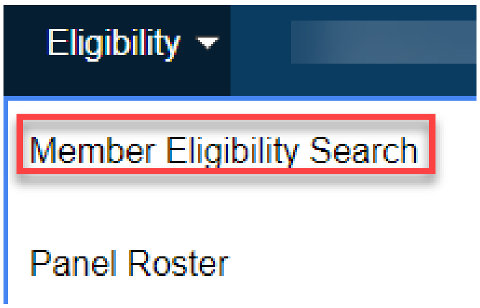
In the Claim Information section you will find additional detail for the Patient at the top and each line with paid amount identified at the bottom.

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

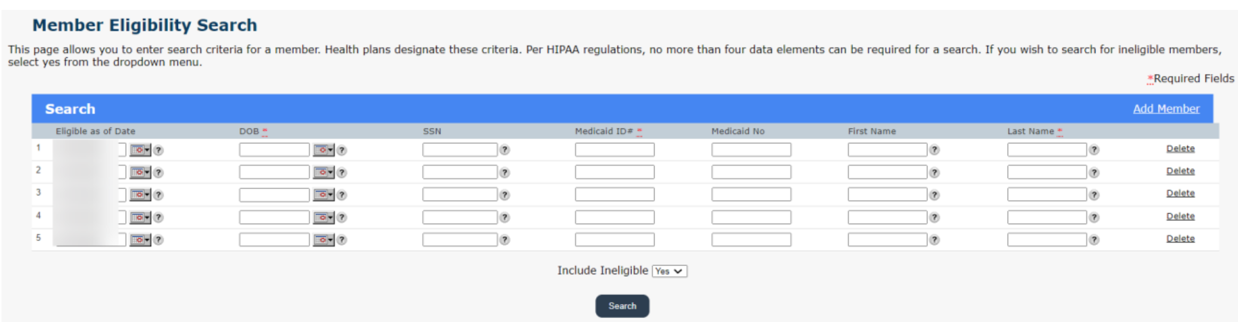
5.1 Member Eligibility Search feature

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

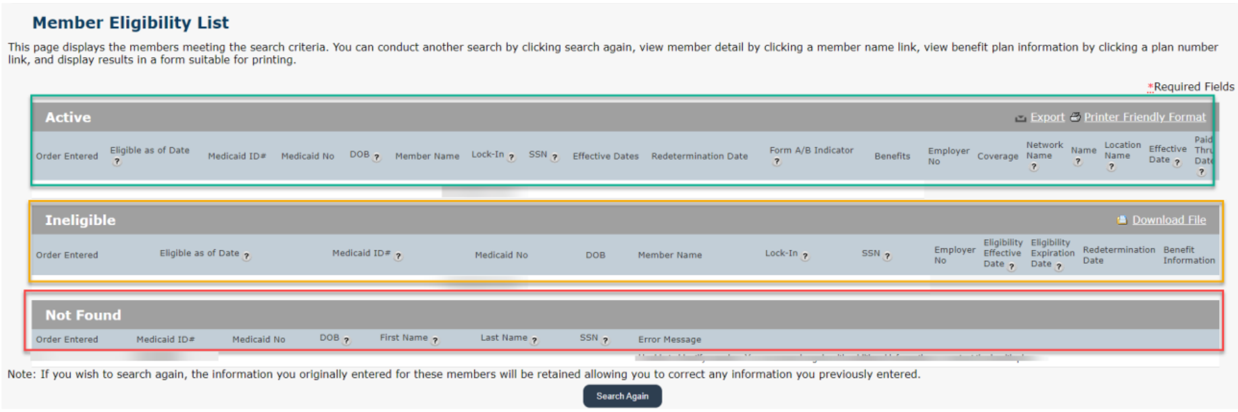
"Member Eligibility Search" page



Step 2
Search for the member. After entering appropriate required fields select the "Search" button

Please Note:
Required fields are DOB and Last Name <u>OR</u> 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 "<u>Add Member</u>" link (to a max of 30 rows)

"Member Eligibility List" page



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

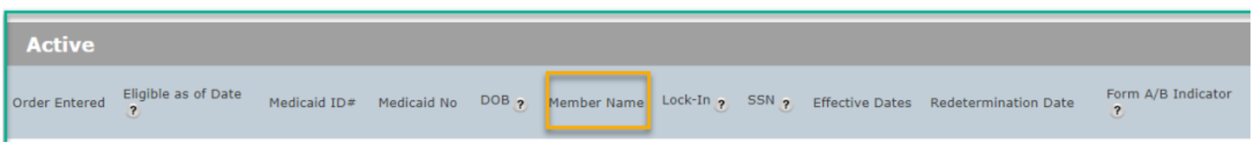
Please Note:
Not Found section will only display when a member that was searched was not found in the system.

"Member Eligibility List" page - Active section

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



Step 3
Select the Member name link

Member Detail

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)

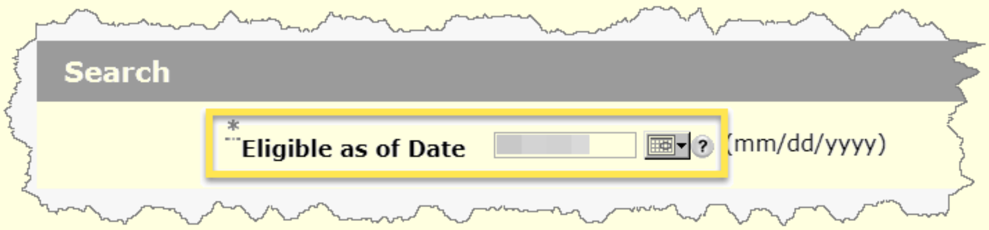
Primary Care Physician section - In this section you will find the members current PCP assignment. This record will return real time from the eligibility system, so you can be sure the PCP listed is the members most current PCP assignment

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)

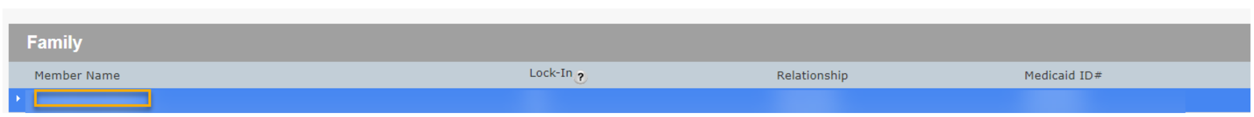
Other Coverage section - In this section we will store any other health/dental/vision coverage or Coordination of Benefits (COB) information

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.



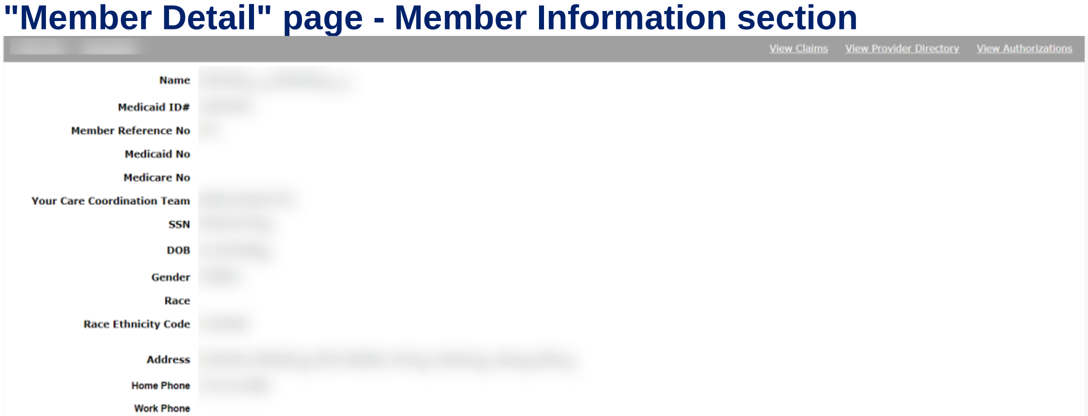
"Member Detail" page - Family Section



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



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

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.

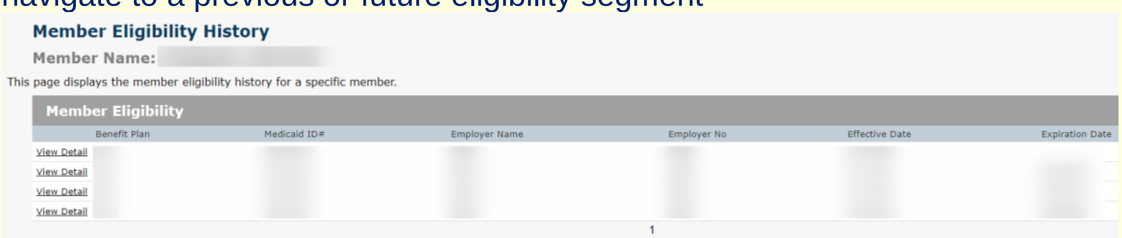
You will find a few links just above the members information section on the "Member Detail" page

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

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 Detail" page - Primary Care Physician section

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				View Historical Contacts
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

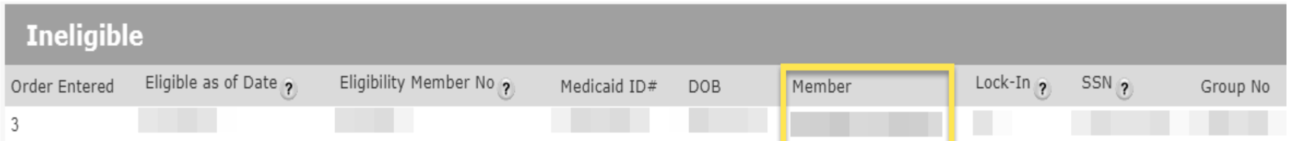
As mentioned previously, in the "Other Coverage" section you will find any other health/dental/vision coverage or Coordination of Benefits (COB) information

"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

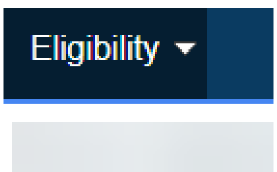


Each member in the "Ineligible" section of the "Member Eligibility List" page will have one link available
The Member name link will navigate you to the Member Detail page

Please Note:
The "Download File" link found above the Ineligible section will export the content listed to an excel spreadsheet.

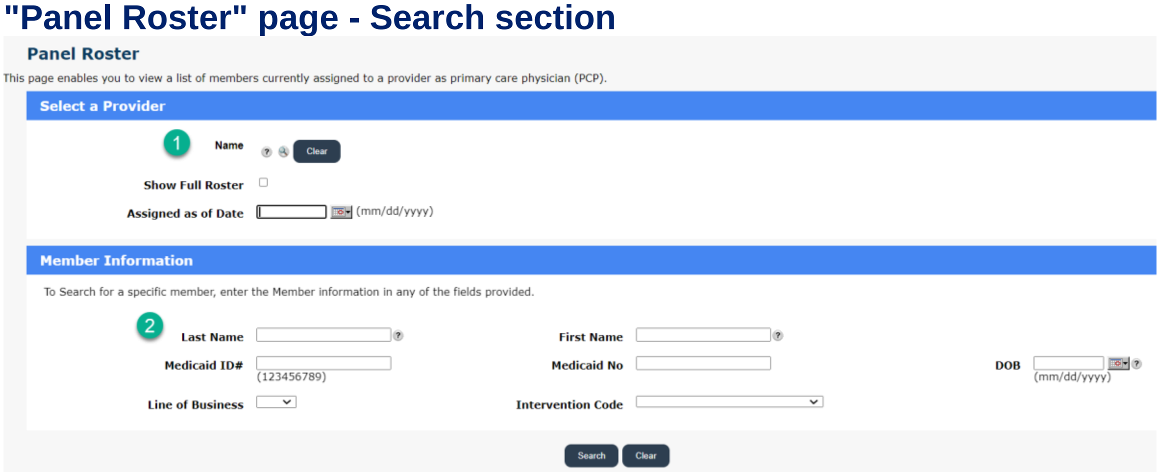
5.2 Panel Roster feature

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



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

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

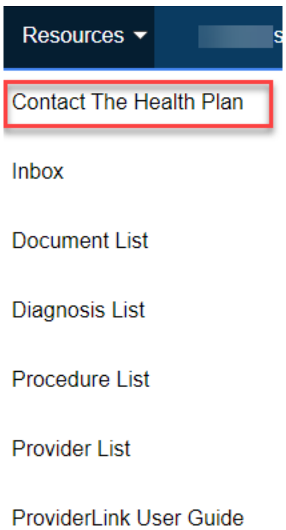
The Member name link will take you to that members "Member Detail" page where you can find additional information regarding that member
The Location Name link will take you to Provider Location Detail

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

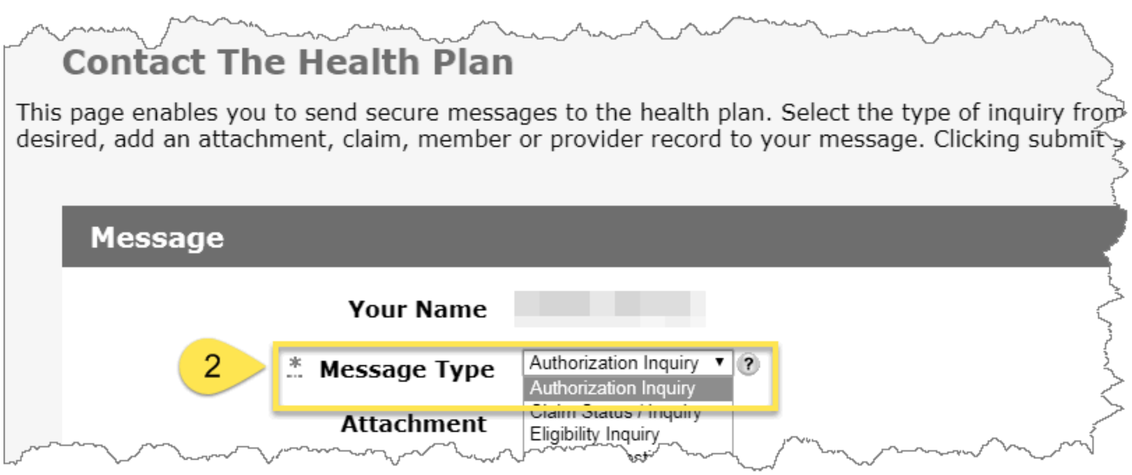
6.1 Contact the Health Plan feature

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.



Step 1
From the Resources drop-down of the menu bar, select the Contact the Health Plan option

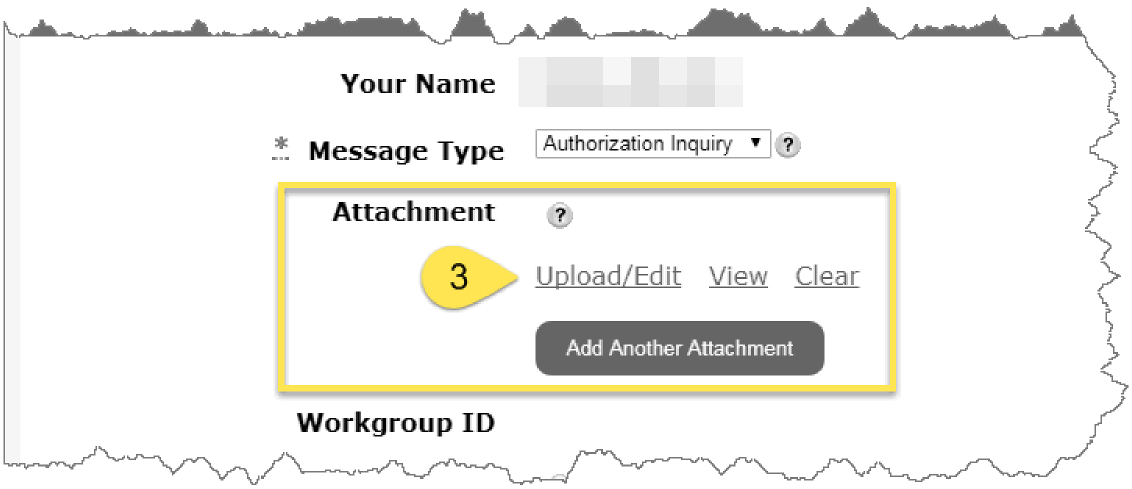
"Contact The Health Plan" page - Message Type



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



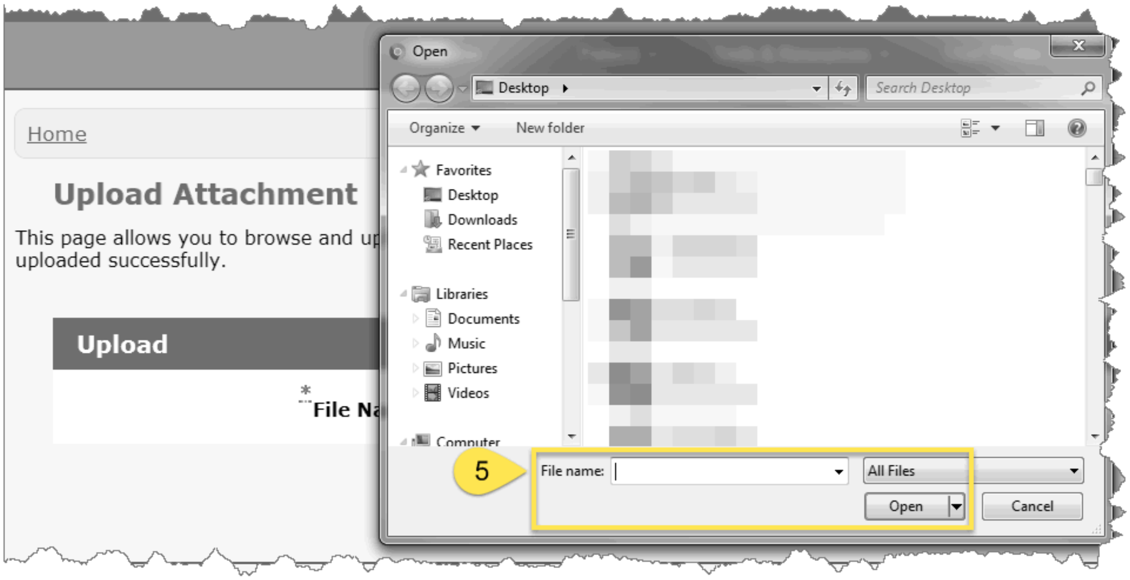
Step 3
If you need to include attachments, select the Upload/Edit link
If no attachments are necessary skip to step 7

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

Step 4
Select the Choose File button to search for the appropriate attachment on your computer

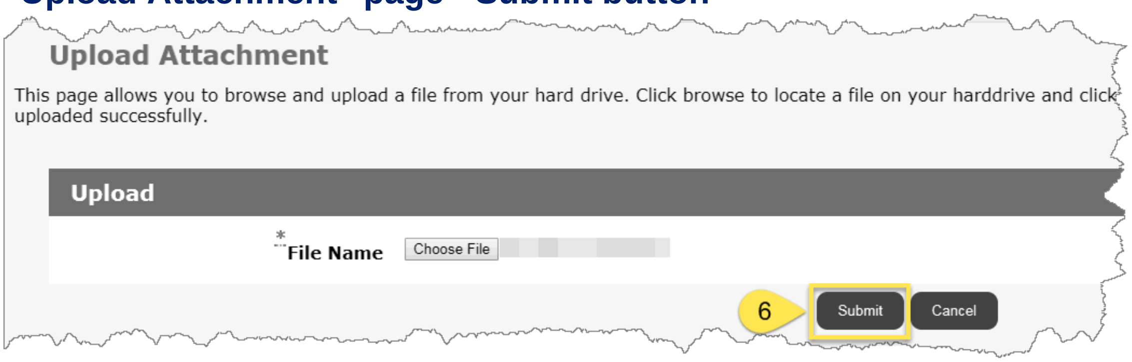
"Upload Attachment" page - Windows Explorer popup



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



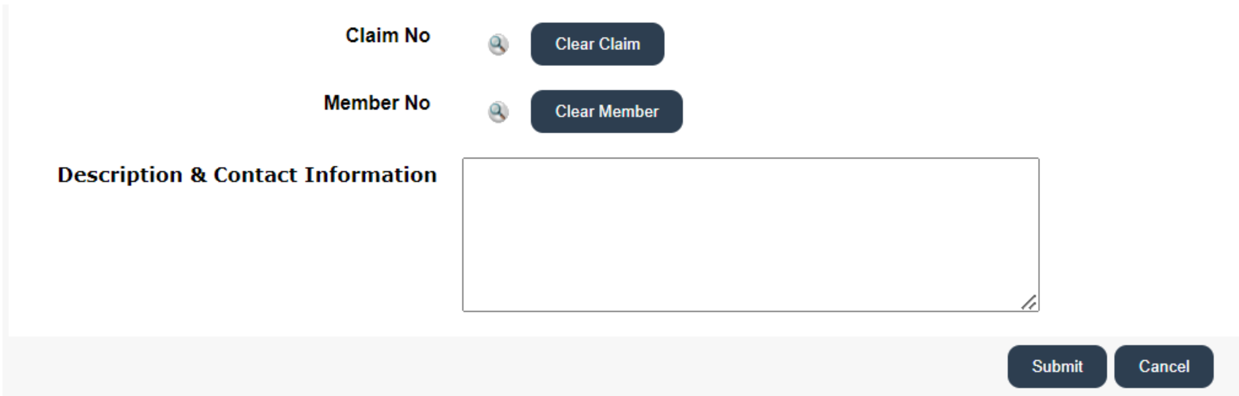
The selected document should now appear to the right of the "Choose File" button

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



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

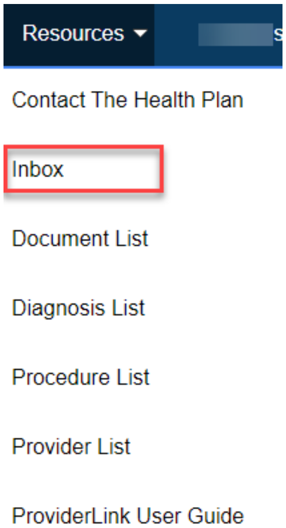
Step 8
Enter appropriate description for your question/issue in the "Description & Contact Information" text box, please be as detailed as possible

"Contact The Health Plan" page - Submit button

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.



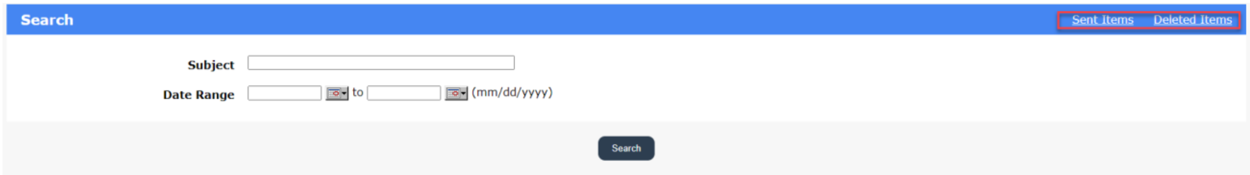
Step 1
From the Tools & Resources drop-down of the menu bar, select the Inbox option

"Inbox" page - Search section

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

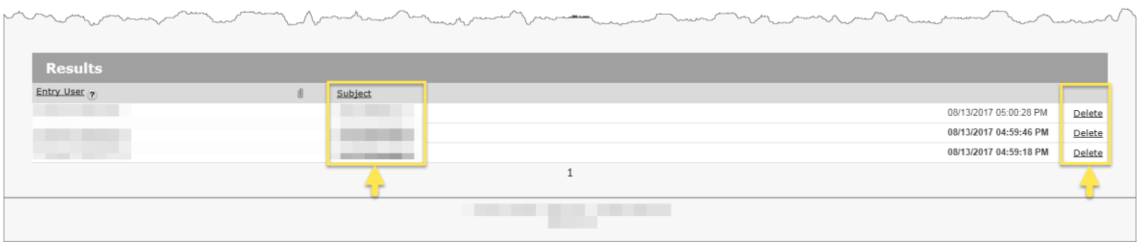
Please Note:
When initially navigating to the "Inbox" page your results will show all current/active messages (read or unread), use the quick links below to review deleted or sent secure messages.

"Inbox" page - Search section links



"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



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

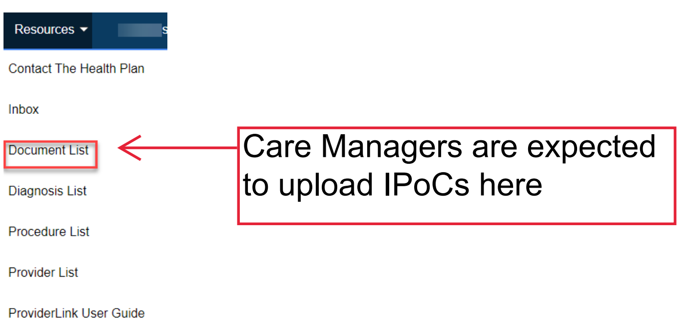
Please Note:
If you ever want to return a "Deleted" item to your inbox view you can complete that through the "Deleted Items" page. On the "Deleted" page you will find a Back To Inbox link.
Deleting a secure message that is on the "Deleted" page will permanently delete the message and you will no longer be able to retrieve this secure message.

"View Message" page

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

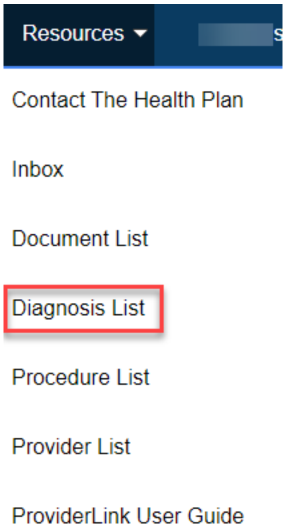
6.3 Document List feature



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

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

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 Export

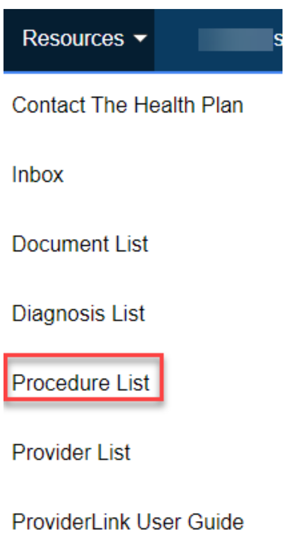
Code	Code Set	Description
A000	ICD10	Cholera due to Vibrio cholerae 01, biovar cholerae
A001	ICD10	Cholera due to Vibrio cholerae 01, biovar eltor
A009	ICD10	Cholera, unspecified
A0100	ICD10	Typhoid fever, unspecified
A0101	ICD10	Typhoid meningitis

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.

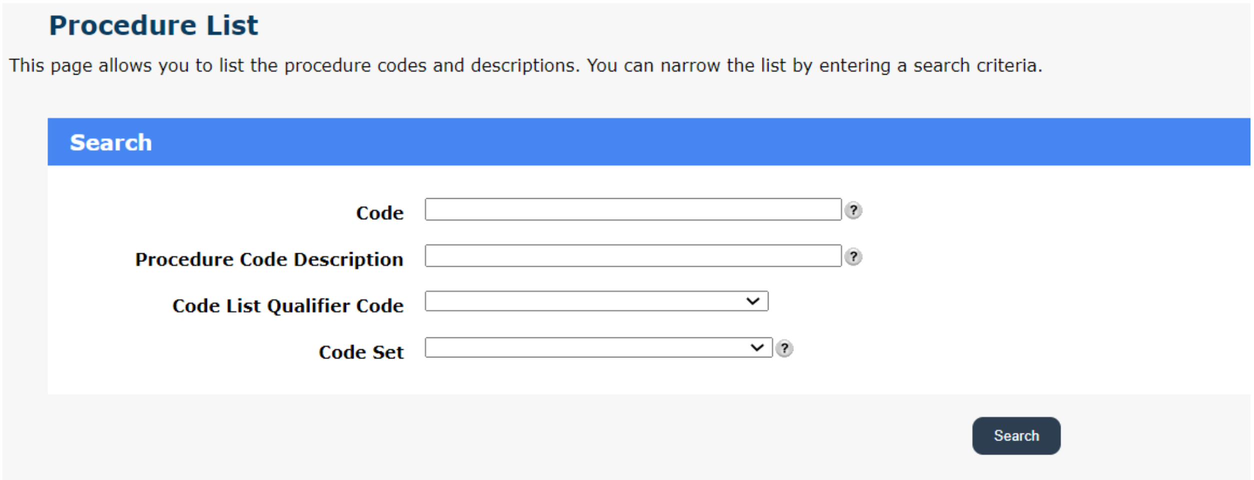
6.5 Procedure List feature

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



Step 1
From the Resources drop-down of the menu bar, select the Procedure List option

"Procedure List" page - Search section



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 — Export

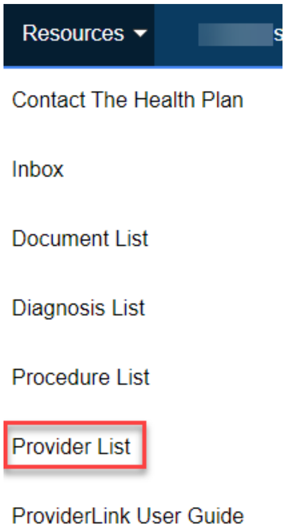
Code	Procedure Code Description	Code Set
0001	TOTAL CHARGES	
0001A	Immunization administration by intramuscular injection of severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) (Coronavirus disease [COVID-19]) vaccine, mRNA-LNP, spike protein, preservative free, 30 mcg/0.3mL dosage, diluent 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.

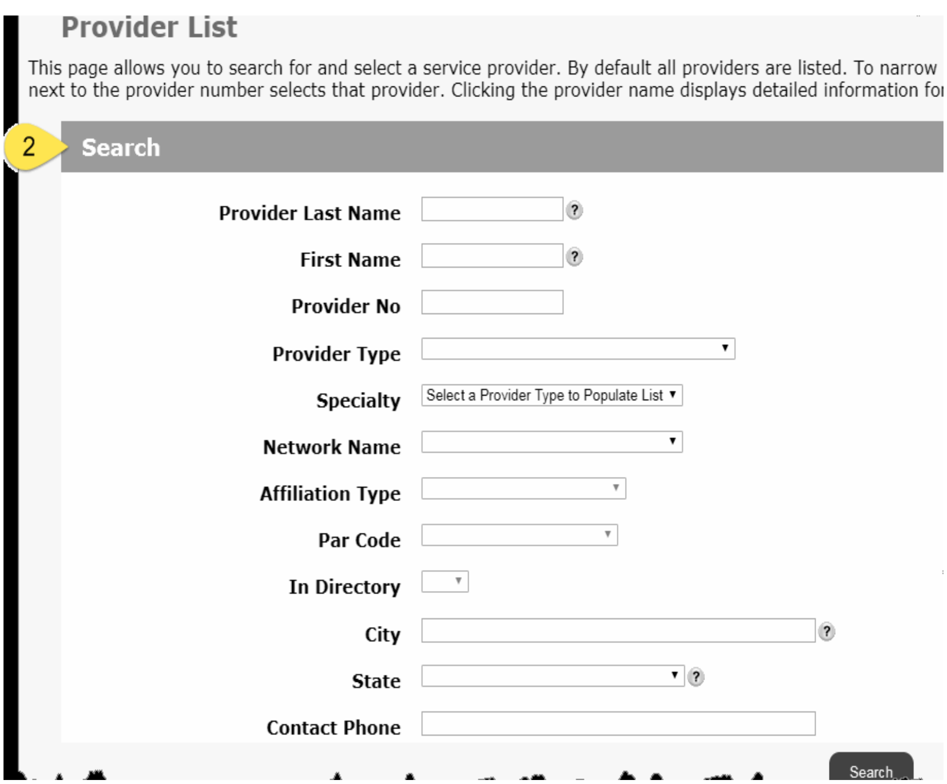
6.6 Provider List feature

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

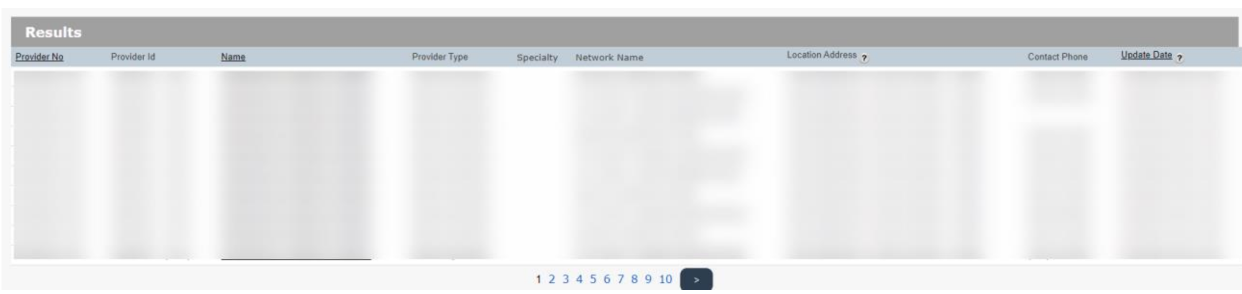
"Provider List" page - Search section



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 "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

"Provider List" page - Results section

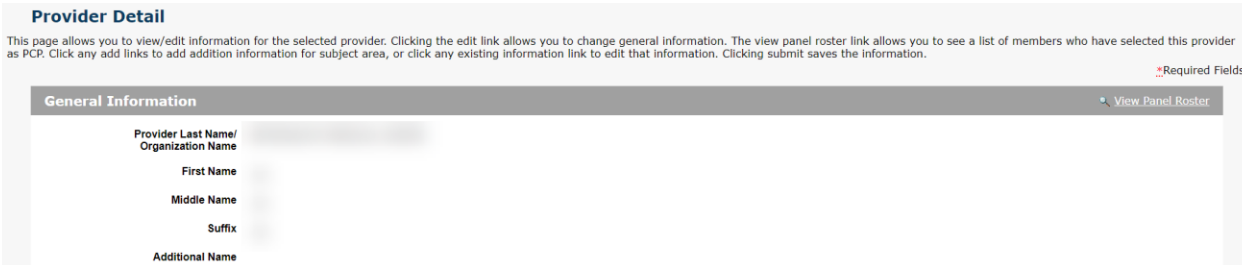


Data from your search request will produce at the bottom of the page in the "Results" section

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

Step 3
Select the Provider name link to view more detail information for that record

"Provider Detail" page



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.

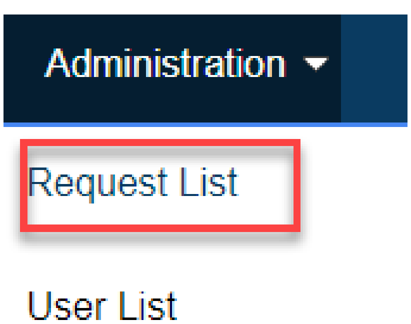
Please Note:
What data is available to display may differ by provider.

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.



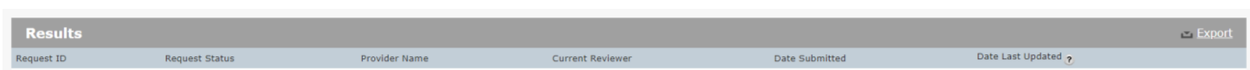
Step 1
From the Administration drop-down of the menu bar, select the Request List option

"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

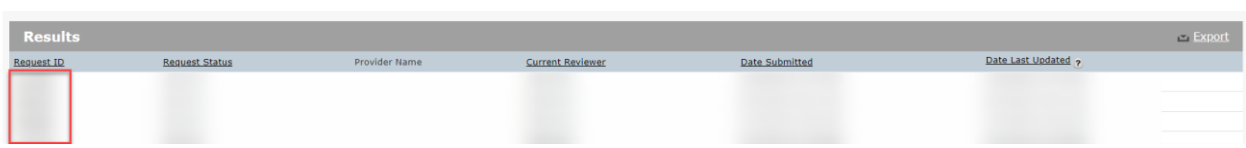
Please Note:
The results section will pre-populate with all available data, since there are some pre-filters set for Request Status of "Pending - New" and Current Reviewer "Provider"

"Request List" page - Results section

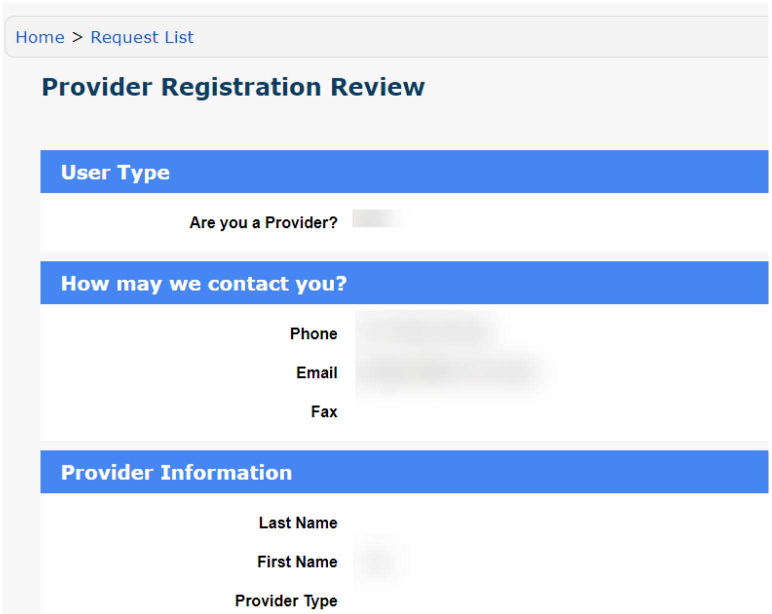


Data from your search request will produce at the bottom of the page in the "Results" section

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



Step 3
Select the "Request ID" link to view Provider Registration Review.

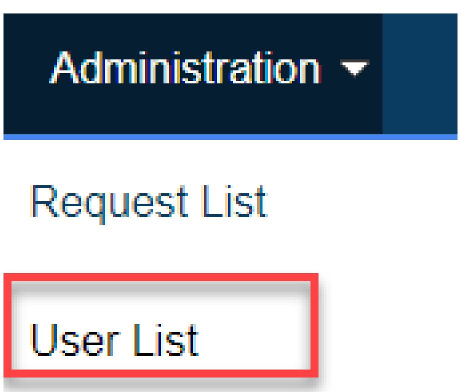


7.2 User List feature

Please Note:
This feature is only available for Provider Administrator users

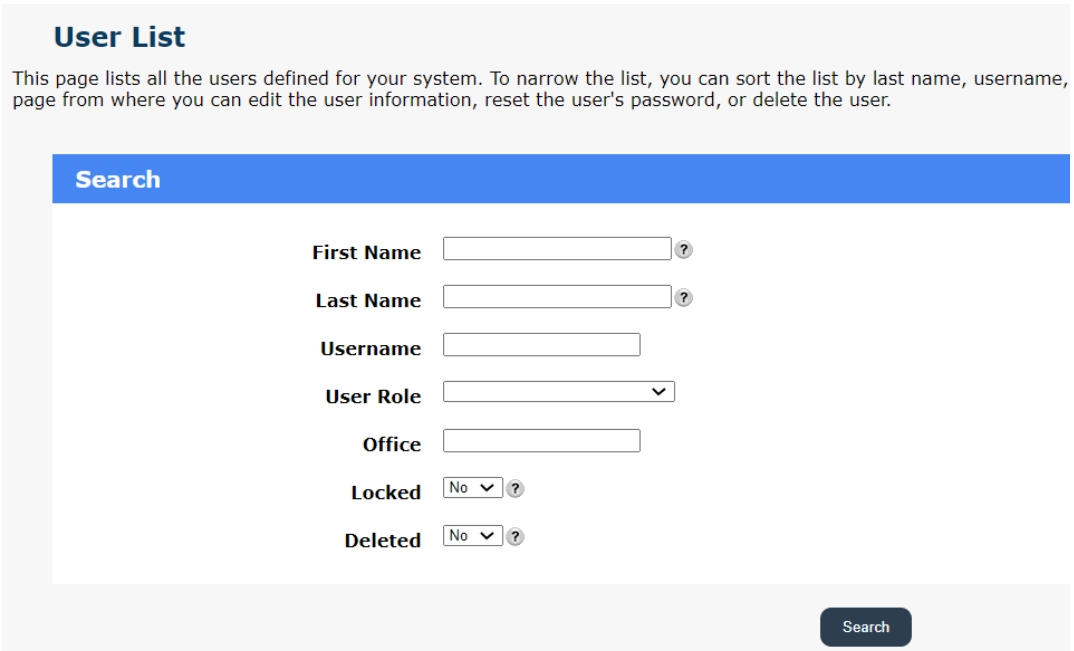
The User List feature will allow you to maintain the user accounts for associates at your office. Within the User List functionality you can:

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



Step 1
From the Administration drop-down of the menu bar, select the User List option

"User List" page - Search section



Step 2
Search for the user account

Please Note:
If you are unable to find a user account one of a few things could 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 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

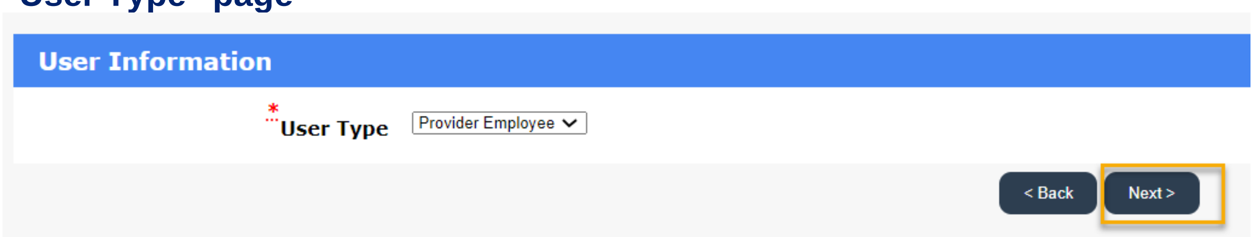
Data from your search request will produce at the bottom of the page in the "Results" section

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

Add a user account

Step 3
Select the "Add User" link found just above the "Results" section

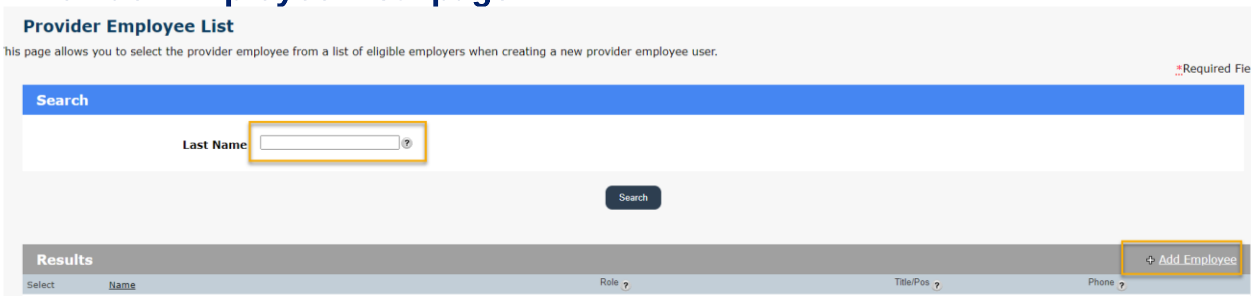
"User Type" page



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

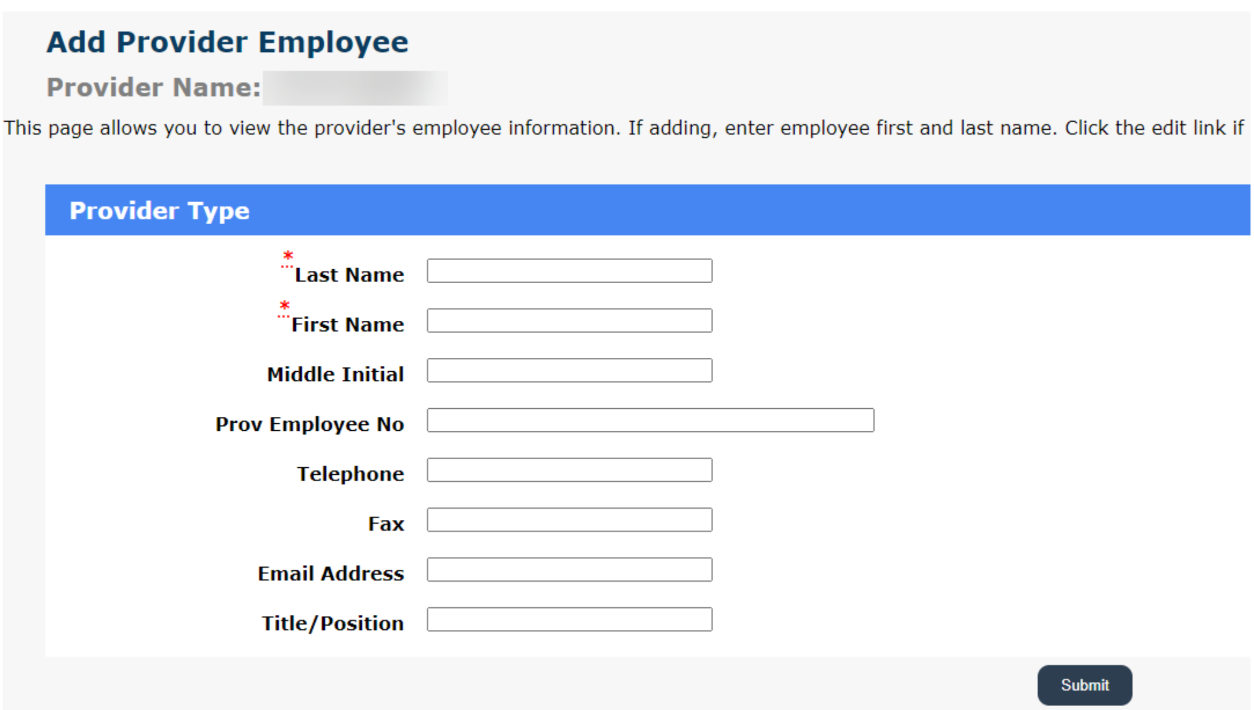


Step 5
Search for the employee by their Last Name

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.

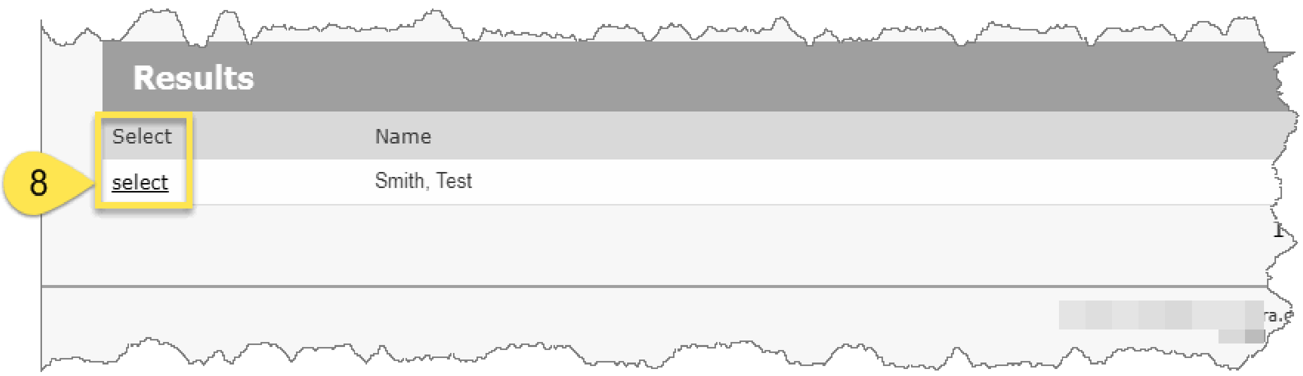
"Add Provider Employee" page



Step 7
Enter Required records and select the "Submit" button

Please Note:
Required elements are marked with a **red ***

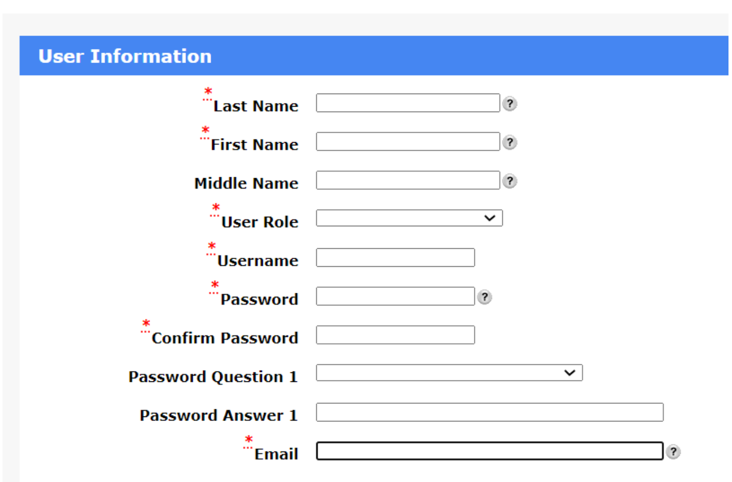
"Provider Employee List" page - select link



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



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 ***

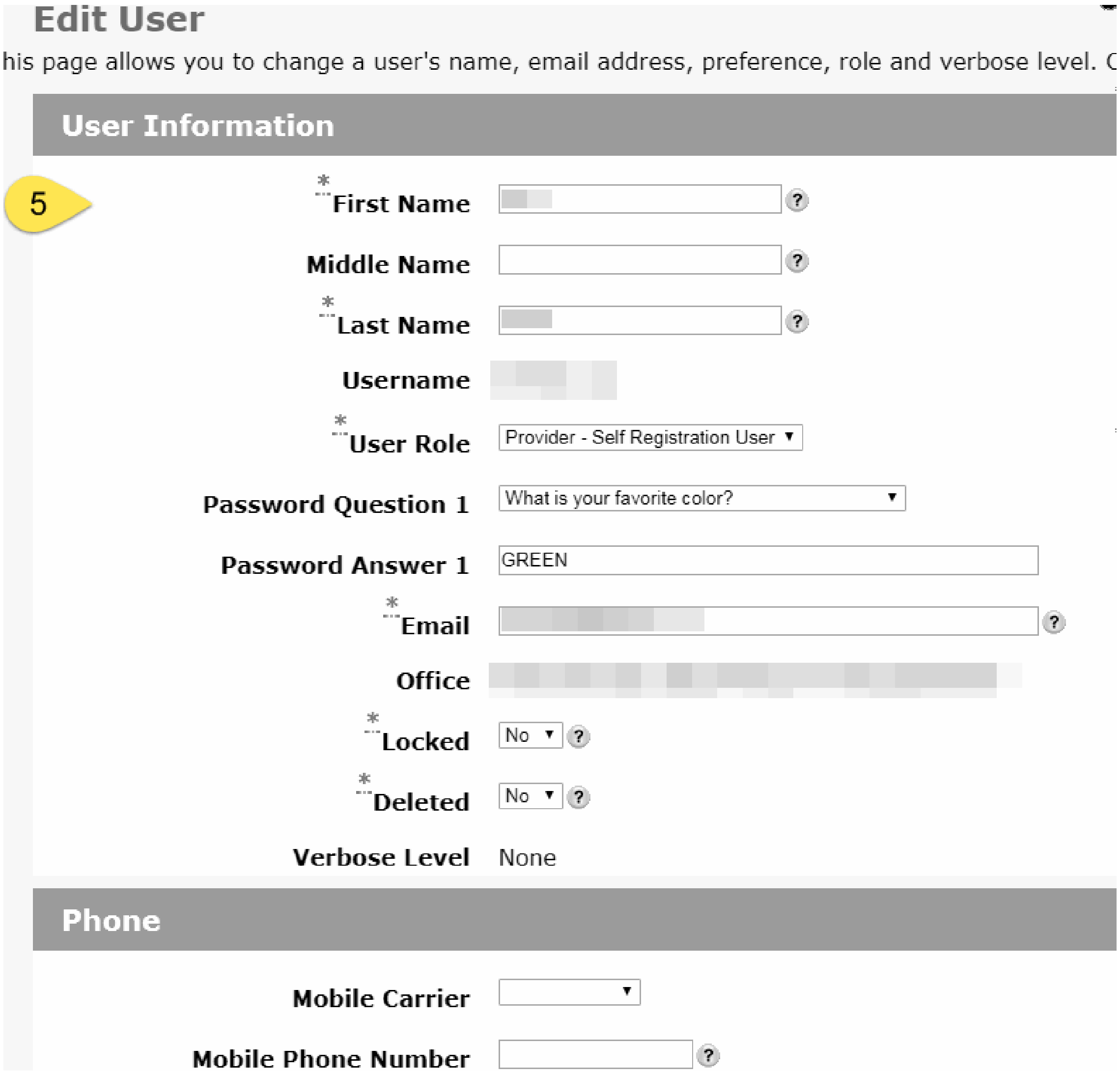
Editing an existing user account

Step 3
Select the "Username" link

User Detail page

Step 4
Select the "Edit User" link

Edit User page

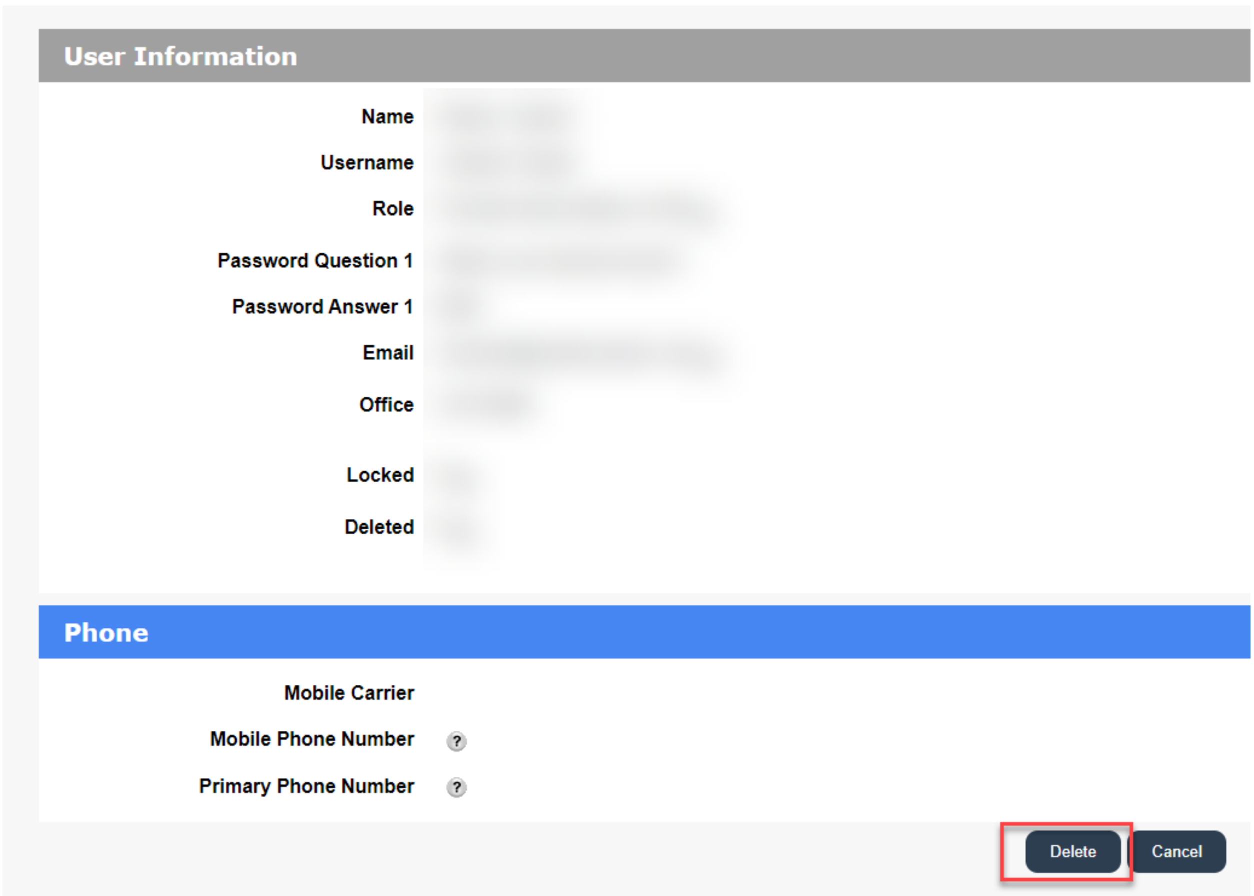


Step 5
Make appropriate adjustments to the "User Information", "Phone", or "Preferences" section and click the "Submit" button at the bottom of the page

Deleting an existing user account

Step 3
Select the "Delete" link

"Delete User" page



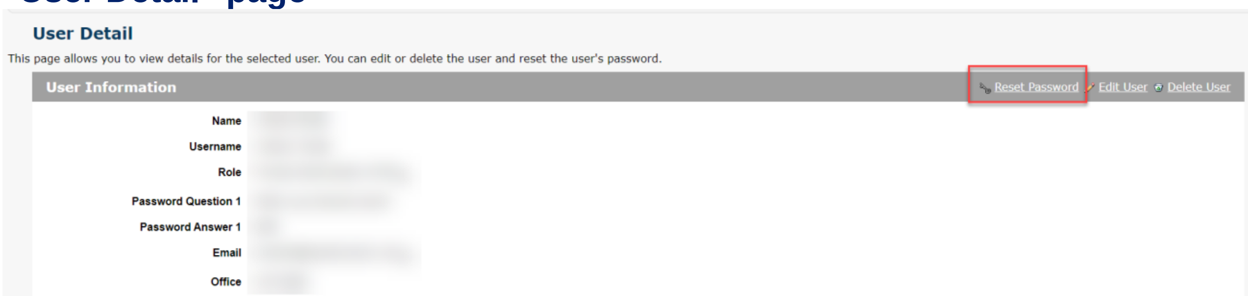
Step 4
Select the "Delete" button found near the bottom of the page

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

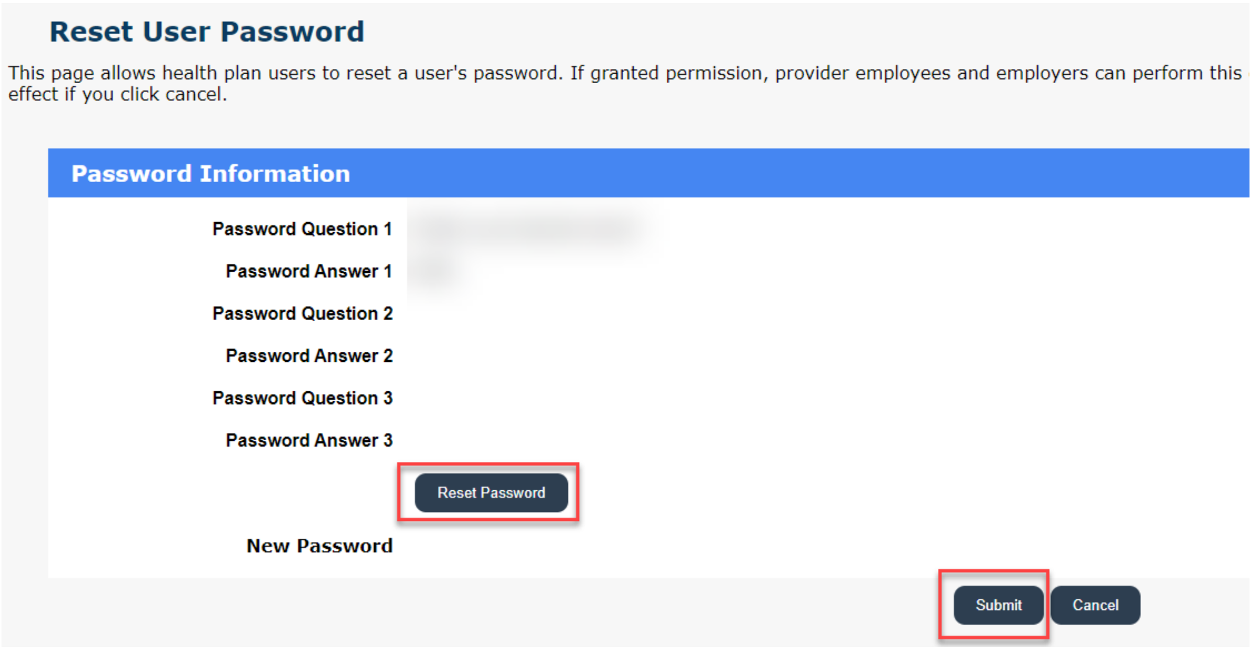
Step 3
Select the "Username" link

"User Detail" page



Step 4
Select the "Reset Password" link

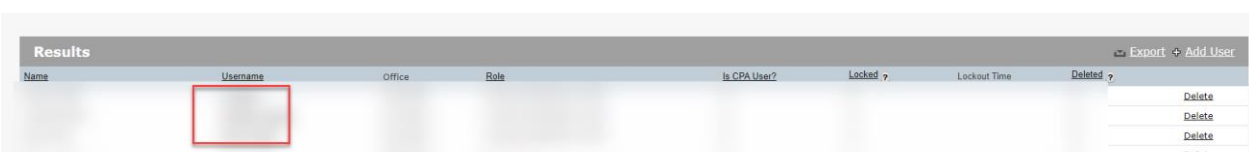
"Reset User Password" page - Reset Password button



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



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

Step 4
Select the "Unlock" link

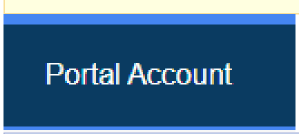
Please Note:
The users account is now unlocked.
If the user has also forgot their password you can quickly submit a temporary password by selecting the "Reset Password" link after unlocking the users account.
Click here to read more.

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.

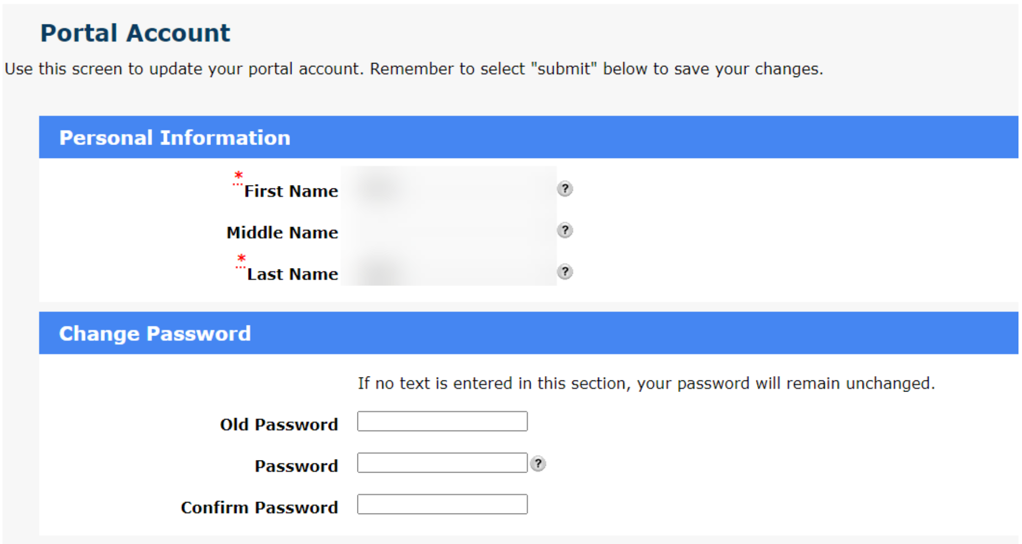
Please Note:
From this page you can update the below information associated with your portal user account:

- 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)



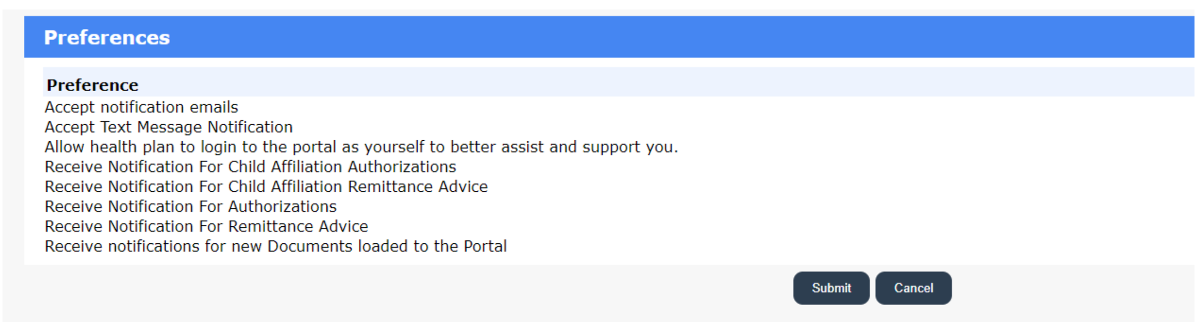
Step 1
From your menu bar, select the Portal Account option

"User Profile" page



Step 2
Update appropriate text boxes with new content

"User Profile" page - Submit button



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).