

Provider Portal 3.0 Manual

Health Axis 3.0 Provider Portal User Guide

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# Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version/Release** | **Date** | **Description of Revisions** | **Author** |
| V1.0 | 03/29/2019 | Initial User Guide | Jasmine Mack |
| V1.1 | 10/30/2020 | Update made for screen changes. | Jasmine Mack |
|  |  |  |  |
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**Health Axis 3.0 Provider Portal**

[](http://www.google.com/imgres?imgurl=http://www.itqwest.com/style/images/art/system-integration.png&imgrefurl=http://www.itqwest.com/&h=270&w=440&tbnid=CHG_NZzPbyFFqM:&docid=Uj2E4UatAgKTcM&hl=en&ei=ozitVcamN4GeNqz5p_gK&tbm=isch&ved=0CD4QMyg7MDs4ZGoVChMIhoSMrKbqxgIVAY8NCh2s_Amv)

# **Provider Portal**

The Provider Portal is a quick resource that allows Providers convenient access to member and claim information. The portal is designed to provide access to: Claim status, Member’s Eligibility, and Authorizations.

# **Key Features**

* Plug in for specific users
* Allows Providers to communicate to the 2.5/IPA portals

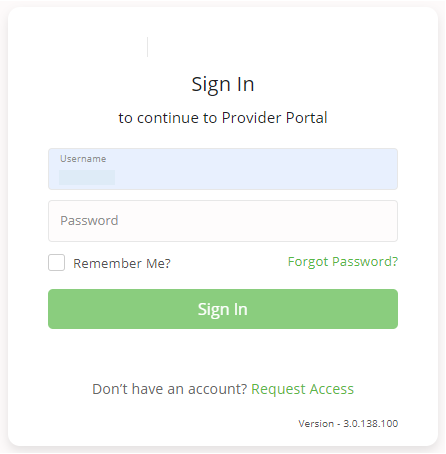
# **How to Access the Provider Portal**

Enter the URL links for the Test and Production environments, which are specific to each client:

**Link:** <https://[healthplan]provider.test.healthaxis.net/login>

<https://[healthplan]provider.prod.healthaxis.net/login>

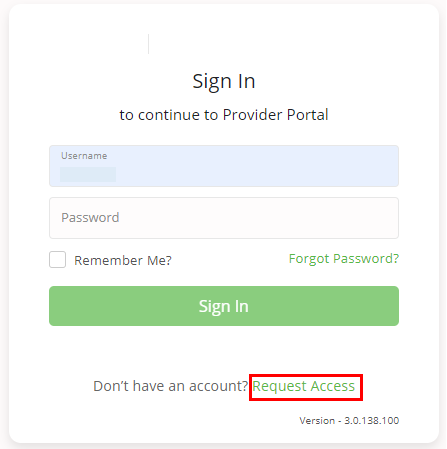
**Note: The Provider Portal cannot be accessed through Internet Explorer, users must use Chrome.**



## **How to login:**

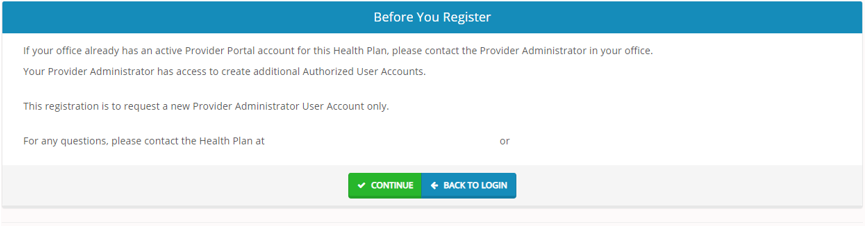
|  |  |
| --- | --- |
| **Steps** | **User Actions** |
| **1** | Enter your Health Axis Provider Portal user name in the **Username** field. |
| **2** | Enter your password into the **Password** field.  **NOTE: Your password will be encrypted.** |
| **3** | Click the **Sign In** button. |
| **4** | When the **Remember my ID on this computer** flag is checked, the username auto populates when next signing in. |
| **5** | When the **Forgot Password** button is selected, users will be taken to the Account Recovery screen. |

# **How to Request Access to the Provider Portal**



Click the “Request Access” button and the screen below will be displayed. Select “Continue” to proceed. Selecting “Back to Login” will return to the log-in page.

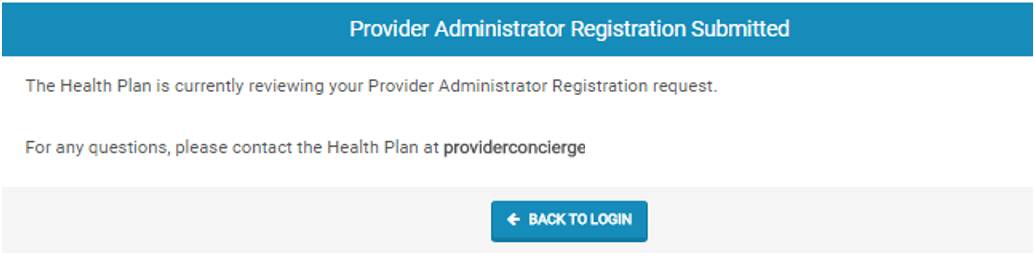
**NOTE: New Provider Portal users should request access by contacting the Provider Administrator.**



Selecting “Continue” will display the Provider Portal Access Request Form. New provider admin users should request access to the Provider Portal using this form. Fill all the details in the form and submit request to plan administrator. Each of the provider admins will have ability to create “User” accounts. NOTE: There are four possible user types: Physician Admin, Facility Admin, Vendor Admin, and IPA Admin.

|  |  |
| --- | --- |
| **Provider Portal Access Request Screen** | |
| **Field Names** | **Select Provider Type Section – Field Descriptions** |
|  | |
| Physician Administrator | The **Physician Administrator** radio button should be selected for Physician Administrator level access. This user type will have access to information limited to their members only. |
| Facility Administrator | The **Facility Administrator** radio button should be selected for Facility/Hospital Administrator level access. |
| Vendor Administrator | The **Vendor Administrator** radio button should be selected for Vendor Group/Physician Group Practice Administrator level access. This user type will have access to all member information associated with all the physicians under the group practice. |
| IPA Administrator | The **IPA Administrator** radio button should be selected for IPA Administrator level access. |
| **Field Names** | **Enter Tax ID or NPI Section – Field Descriptions** |
|  | |
| Tax ID | In the **Tax ID** field, enter the appropriate Tax Identification Number; this field is displayed for Vendor Administrators or IPA Administrators only.  Note: System will validate the TIN is in HAX system. If not found, it will display notification: “Tax ID doesn’t exist in the system. |
| NPI | In the **NPI** field, enter the appropriate NPI (National Provider Identifier) number; this field is displayed for Physician Administrators and Facility Administrators only.  Note: System will validate the NPI is in HAX system. If not found, it will display notification: “NPI doesn’t exist in the system.” |
| **Field Names** | **Create a User Name & Password Section – Field Descriptions** |
|  | |
| User Name | In the **User Name** field, create a user name, containing five or more alphanumeric characters.  Note: System will trigger notification “Enter different User Name” if the user name entered is already in use. |
| Password | In the **Password** field, create a password containing a minimum of six characters to include: 1 Uppercase, 1 Lowercase, 1 Numeric, and 1 Special Character. |
| Re-Enter Password | In the **Re-Enter Password** field, type in the password exactly as it was entered in the password field. Note: System will trigger notification “Value should match password” if there is a discrepancy between the two password fields. |
| **Field Names** | **Enter Demographic Information Section – Field Descriptions** |
|  | |
| Salutation | Select an optional **Salutation** for the user from the drop-down list values. |
| Email | Enter an **Email Address** for the user. Note: Required field. |
| First Name | Enter **First Name** of the user. Note: Required field. |
| Last Name | Enter **Last Name** of the user. Note: Required field. |
| Organization Name | Enter the **Organization Name** into this field. Note: Required field. |
| Role/Title | Enter the user’s **Role** or **Title** into this field. Note: Required field. |
| Phone Number | Enter a **Phone Number** for the user. Note: Required field. |
| Ext | Enter an extension for the user’s phone number, if applicable. |
| Address 1 | Enter the user’s **Address**. Note: Required field. |
| Address 2 | Continue entering **Address** from Address 1 field, if applicable. |
| City | Enter the **City** into the field. Note: Required field. |
| State | Select the **State** from the drop-down list. Note: Required field. |
| Zip Code | Enter a valid **Zip Code**. Note: Required field. |
| Submit | Select **Submit** when all required fields are completed. |
| Reset | Select **Reset** to clear the fields and re-start the form. |

Once the Provider Administrator submits a request a popup window as shown below will be displayed stating that your request has been submitted. The user will receive an email notification, once the Administrator approves their User Access.

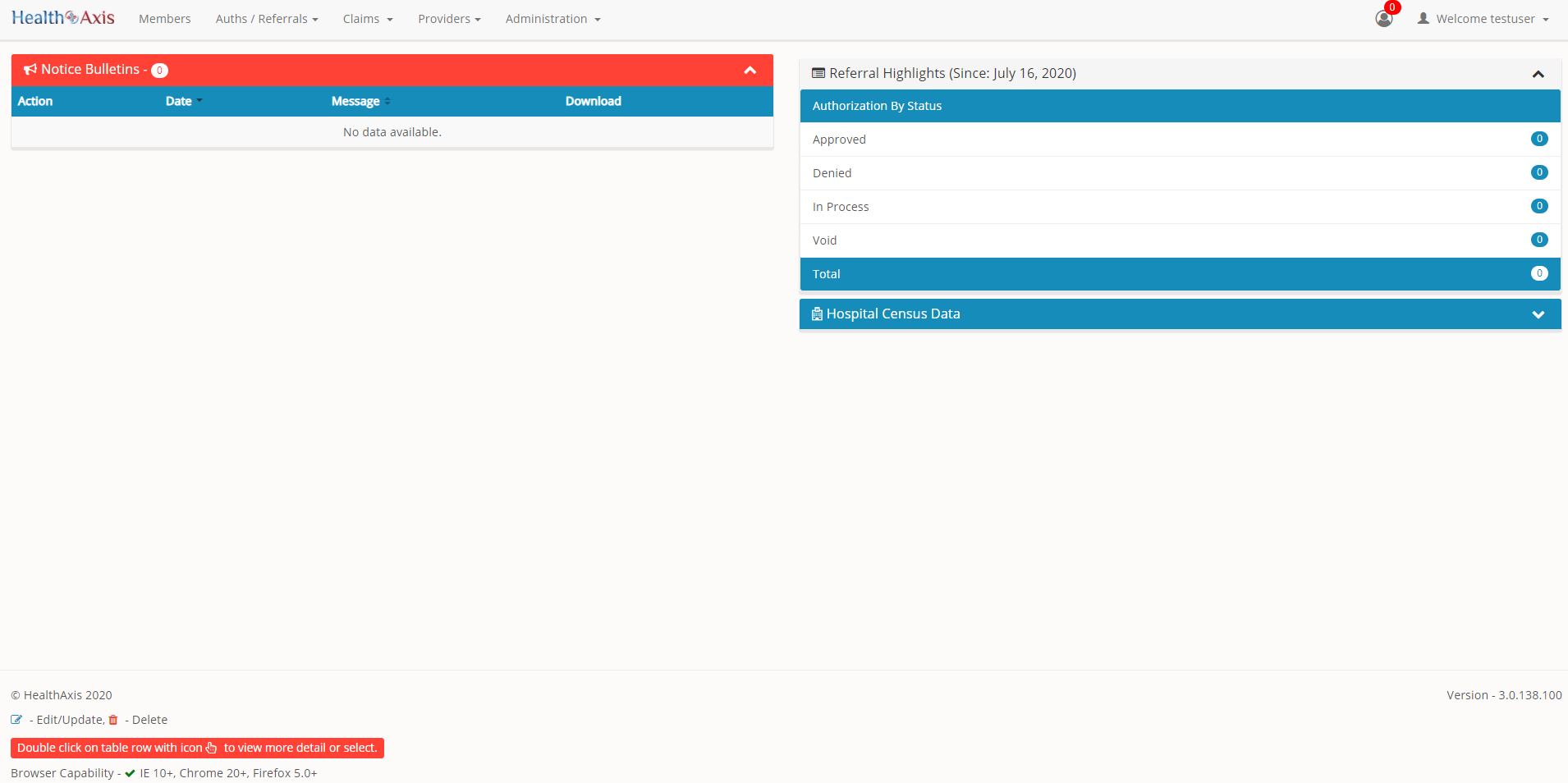


## **User Types Hierarchy**

1. **System Administrator** – Only System Administrators can Approve/Deny a Provider Administrator’s Access Request Form or they can go to Create User Screen, to create a Provider Administrator.
2. **Provider Administrator (Physician Administrator, Facility Administrator, Vendor Administrator, or IPA Administrator)** – There can only be one (1) Provider Administrator per NPI/Tax ID. Only the Provider Administrator can complete the Request Access Form (login screen).
3. **Provider Authorized Users (Physician Auth. User, Facility Auth. User, Vendor Auth. User, and IPA Auth. User)** – Only the Provider Administrators can create a Provider Authorization User account, for their respective NPI/Tax ID. A Provider Authorized User would need to reach out to their designated Provider Administrator to request a user account.

# **Dashboard**

The Dashboard is the landing page displayed once the user logs into the portal. The dashboard gives the user an overview of authorizations by status, Hospital Census Data and Notice Bulletins.



# **Members Module**

The Member Module allows users with specific access to search and view member details.

## **Accessing the Member Module**

Once logged into the system, select Members from the dashboard.



## **Member Search**

Upon selecting “Members,” the Member Search popup window will display. Users may search for members based on the filters provided in the following table.

However, the member search results are dependent on the user roles:

* User – Admin: Can view all active members
* User – Provider: Can only view members that are tied to the PCP
* User – Facility/Vendor: Can search for all members but will need to enter Member ID and DOB or Medicare ID number.

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| --- | --- | --- | --- |
| **Member Screen** | | | |
| **Field Names** | | **Member Search Section – Field Descriptions** | |
|  | | | |
| Member ID | | | The **Member ID** allows users to enter the Member’s ID number. |
| First Name | | | The **First Name** field allows users to enter the member’s First Name. |
| Last Name | | | The **Last Name** field allows users to enter the member’s Last Name. |
| Member DOB | | | The **Member DOB** date field allows users to select the Member’s DOB using the calendar feature or by manually keying the member’s DOB in as follows: MM/DD/YYYY |
| Medicare ID | | | The **Medicare ID** field allows users to enter the Medicare Beneficiary Identifier (MBI) as part of the search criteria. |
| Line of Business | | | The **Line of Business** field allows users to narrow the member search by selecting a line of business from the dropdown list. |
| Benefit Plan | | | The **Benefit Plan** field allows users to narrow the member search by selecting a benefit plan from the dropdown list. |
| IPA | | | The **IPA** field allows users to narrow the member search by selecting an IPA from the dropdown list. |
| Search | | | The **Search** button allows users to launch the search functionality, based on criteria selected. The results will populate below the search section. |
| Reset | | | The **Reset** button allows users to clear all data from the fields prior to saving. |
| **Member Search Screen** | | | |
| **Field Names** | | **Member Results Section – Field Descriptions** | |
|  | | | |
| Back | The **Back** button will display the member search field to allow users to enter search criteria. | | |
| Search Results | The **“Search Results”** heading tells the users how many records are displayed in the results table. | | |
| Export | The **Export** button allows the user to export the results data into an Excel format. | | |
| Results Table | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. | | |
| Member ID | The **Member ID** hyperlink allows the user to open and view the Member Details. | | |

## **Member Information**

Upon clicking on the selected member from the grid, the member information will populate into the member information screen. The user can now view the Member’s Information, Current Coverage, Coverage History, IPA/PCP Information, and Coordination of Benefits.

|  |  |
| --- | --- |
| **Member Information Screen** | |
|  | **Member Information Section** |
| The **Member Information** section allows users with specific access to view all active members’ demographic information. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited. | |
| **Member Information Screen** | |
|  | **Current Coverage Section** |
| The **Current Coverage** section allows users with specific access to view all active members’ coverage. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited. | |

|  |  |
| --- | --- |
| **Member Information Screen** | |
|  | **Coverage History Section** |
| The **Coverage History** section allows users with specific access to view all active members’ coverage history. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited. | |
| **Member Information Screen** | |
|  | **IPA/PCP History Section** |
| The **IPAPCP History** section allows users with specific access to view all active members’ IPA/PCP history. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited. | |
| **Member Information Screen** | |
|  | **Coordination of Benefits Section** |
| The **Coordination of Benefits** section allows users with specific access to view all active members’ COBs. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited. | |

**Action Buttons**

The Action Buttons at the top of the Member Information screen allows users to perform various tasks within the member information screen.

|  |  |  |
| --- | --- | --- |
| **Member Information Screen** | | |
| **Field Names** | | **Action Buttons – Field Descriptions** |
|  | | |
| Authorization | The **Authorization** button allows users to view all authorizations tied to the selected member or create an authorization for the selected member.  Choices are: | |
| Claim | The **Claim** button allows users to view all claims tied to the selected member. | |
| Problems | The **Problems** button allows users to view or manual create a new problem for selected member. Problems will display all ICD codes submitted on a claim or authorization for the member. Problems can be viewed by Date of Service, by ICD code and by the Provider. Use the error located on each collapsible section to expand. Upon clicking the Problems button, the following screen will appear. | |
| Print | The **Print** button allows users to print the member information screen. | |

# **Authorizations / Referrals Module**

The Authorization / Referrals Module allows users with specific access to search, view and submit an authorization or referral request.

## **Accessing the Authorizations/Referrals Module**

Once logged into the system, select Authorizations / Referrals from the dashboard.



The dropdown list for the Authorizations/Referrals Module contains the following selections:



## **Search Authorization**

The Search Authorizations screen will allow users to search for authorizations and referrals based on the filters provided in the following tables.

However, the authorization search results are dependent on the user roles:

* User – Admin: Can view all authorizations and/or referrals for active members.
* User – Provider: Can only view all authorizations and/or referrals of members that are tied to the PCP.
* User – Facility: Can search for all auth of members where authorizations and/or referrals have their facility.
* User – Vendor: Can search for all authorizations and/or referrals of members where vendor is tied to the providers in the authorization or referral.

**Hospital Census Data**

Upon clicking the Authorization Module, the Hospital Census Data will display. (If it is collapsed, click the arrow on the right to expand).

|  |  |
| --- | --- |
| **Authorization Screen** | |
|  | **Hospital Census Data Section** |
| **The Hospital Census Data section allows the users to view the number of admissions, total days, and average length of stay for admitted members.** | |

**Search Authorization**

Upon clicking the Authorization Module, the Search Authorization screen will display. (If it is collapsed, click the arrow on the right to expand).

|  |  |
| --- | --- |
| **Authorization Screen** | |
| **Field Names** | **Search Authorization Section – Field Descriptions** |
|  | |
| Authorization / Referral Number | The **Authorization / Referral Number** field allows users to enter an authorization number as part of the search criteria. |
| Authorization / Referral Status | The **Authorization / Referral Status** field allows users to select the appropriate Authorization Status from the dropdown list as part of the search criteria. |
| Received Date From | The **Received Date From** field allows users to select the “received date from” as part of the search criteria, by either using the calendar, or manually entering the date in the following format: MM/DD/YYYY |
| Received Date To | The **Received Date To** field allows users to select the “received date” (to) as part of the search criteria, by either using the calendar, or manually entering the date in the following format: MM/DD/YYYY |
| Member | The **Member** field allows the user to enter the member’s name (Last Name, First Name) or click the Find button (shown to the left) to select the member from the Member Search popup window as part of the search criteria. |
| Type | The **Type** field allows users to narrow an authorization search by selecting the authorization type from the dropdown list. |
| Place of Service | The **Place of Service** field allows users to narrow an authorization search by selecting the service location from the dropdown list. |
| Authorization / Referral Type | The **Authorization / Referral Type** field allows users to select the appropriate Authorization / Referral Type from the dropdown list. |
| Ordering Provider | The **Ordering Provider** field allows users to enter the name of the ordering provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria. |
| Requested Provider | The **Requested Provider** field allows users to enter the name of the requested provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria. |
| Line of Business | The **Line of Business** field allows users to select a LOB from the dropdown list as part of the search criteria. |
| IPA | The **IPA** field allows users to select an IPA (or Network) from the dropdown list as part of the search criteria. |
| Authorization Submission | The **Authorization Submission** flag allows users to select Authorization Submissions only as part of the search criteria. |
| Referral Submission | The **Referral Submission** flag allows users to select Referral Submissions only as part of the search criteria. |
| Search | The **Search** button allows users to launch the Search Authorization functionality based on the criteria selected. The results will populate below the search section. |
| Reset | The **Reset** button allows users to clear all data from the fields prior to saving. |

|  |  |  |
| --- | --- | --- |
| **Authorization Screen** | | |
| **Field Names** | | **Authorization Results Section – Field Descriptions** |
|  | | |
| Export | The **Export** button allows the user to export the results data into an excel format. | |
| Results Table | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. | |
| Auth / Referral Number | The **Auth/Referral Number** hyperlink allows the user to open and view the Auth Details. | |

## **Authorization Information**

**Authorization Review Screen**

Upon clicking on the selected authorization from the results grid, the authorization review screen will display. The user can view the details of the member’s authorization selected. The authorization review screen consists of the following collapsible sections: member’s information, member’s current coverage, authorization summary, ordering provider, requested facility, requested services, decision and routing information, attachments, notifications (letters), and inpatient tracking log.

***Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.***

|  |  |
| --- | --- |
| **Authorization Review Screen** | |
|  | **Member Information Section** |
| The **Member Information** section allows users to view the member’s demographic information. | |
| **Authorizations Review Screen** | |
|  | **Authorization Summary Section** |
| The **Authorization Summary** section allows users to view the summary details of the member’s authorization. | |

|  |  |
| --- | --- |
| **Authorization Review Screen** | |
|  | **Ordering Provider Section** |
| The **Ordering Provider** section allows users to view the ordering provider’s details. | |
| **Authorization Review Screen** | |
|  | **Requested Provider Section** |
| The **Requested Provider** section allows users to view the requested provider’s details. | |

|  |  |
| --- | --- |
| **Authorization Review Screen** | |
|  | **Requested Facility Section** |
| The **Requested Facility** section allows users to view the requested facility’s details. | |
| **Authorization Review Screen** | |
|  | **Requested Services Section** |
| The **Requested Services** section allows users to view the requested services of the member’s authorization. | |

|  |  |
| --- | --- |
| **Authorization Review Screen** | |
|  | **Decision and Routing Information Section** |
| The **Decision and Routing Information** section allows users to view the decision and routing details of the member’s authorization. | |

## **Submit Authorization / Referrals**

The Submit New Authorization / Referral screen will allow users to generate an authorization or referral submission in the system by searching for the member and completing the required fields.

|  |  |
| --- | --- |
| **Submit Authorization Screen** | |
| **Field Names** | **Member Information Section – Field Descriptions** |
| The **Member Information** section allows users to view the member’s demographic information. | |
| **Submit Authorization Screen** | |
| **Field Names** | **Current Coverage Section – Field Descriptions** |
| The **Current Coverage** section allows users with specific access to view all active members’ coverage. | |

|  |  |
| --- | --- |
| **Submit Authorization Screen** | |
| **Field Names** | **Authorization Section – Field Descriptions** |
|  | |
| Submit Authorization / Submit Referral | The **Submit Authorization / Submit Referral** radio buttons allows the user to classify the submission as either an authorization or referral request. |
| Type | The **Type** field allows the user to select the priority of the request from the drop-down list. Available options are: Standard and Expedited. |
| Place of Service | The **Place of Service** field allows the user to select the place of service from the drop-down list. |
| Authorization Type | The **Authorization Type** field allows the user to select the type of authorization from the drop-down list.  Note: The available options depend on the selections in the Type and Place of Service fields. |
| Start Date | The **Start Date** field allows the user to select the Authorization / Referral Start date from the calendar or by entering the date in MM/DD/YYYY format.  ***Note: This field defaults to the current date of submission.*** |
| Expiration Date | The **Expiration Date** field allows the user to select the Authorization / Referral Expiration date from the calendar or by entering the date in MM/DD/YYYY format.  ***Note: This field defaults to 90 days from the current date of submission.*** |
| Admit Date | The **Admit Date** field allows the user to select the Admission date from the calendar or by entering the date in MM/DD/YYYY format.  Note: This field is only available when specific facilities (i.e. Inpatient Hospital, SNF) are selected in the Place of Service field. |
| Admit Time | The **Admit Time** field allows the user to select the Admission time from a drop-down list or enter it in HH:mm format.  Note: This field is only available when specific facilities (i.e. Inpatient Hospital, SNF) are selected in the Place of Service field. |

|  |  |
| --- | --- |
| **Submit Authorization Screen** | |
| **Field Names** | **Ordering Provider Section – Field Descriptions** |
|  | |
| Select Provider | The **Select Provider** button allows users to perform a provider search and select the appropriate provider record. |
| Clear | The **Clear** button removes the select provider information. |
| Provider # | The **Provider #** field auto-populates based on the provider record that is selected. |

|  |  |
| --- | --- |
| **Submit Authorization Screen** | |
| **Field Names** | **Requested Provider Section – Field Descriptions** |
|  | |
| Select Provider | The **Select Provider** button allows users to perform a provider search and select the appropriate provider record. |
| Clear | The **Clear** button removes the select provider information. |
| Provider # | The **Provider #** field auto-populates based on the provider record that is selected. |

|  |  |
| --- | --- |
| **Submit Authorization Screen** | |
| **Field Names** | **Requested Facility Section – Field Descriptions** |
|  | |
| Select Facility | The **Select Facility** button allows users to perform a facility search and select the appropriate facility record. |
| Clear | The **Clear** button removes the select provider information. |
| Provider # | The **Provider #** field auto-populates based on the facility record that is selected. |
| Working Location | The **Working Location** field allows the user to select the facility location from the drop-down list. |

|  |  |
| --- | --- |
| **Submit Authorization Screen** | |
| **Field Names** | **Requested Services Section – Field Descriptions** |
|  | |
| Select Favorites | The **Select Favorites** drop-down list allows users to select from previously created Favorite templates, that may include DxCodes, ICD Proc Codes, and/or Line Items. |
| Add / Manage Favorites | The **Add/Manage** favorites section allows users to add or remove elements from the Favorites drop-down list. To create a favorite, the user must enter a Name, Select the corresponding DxCode, ICD Proc Codes, and/or Line item codes and select Add Favorite. |
| ICD 9 / ICD 10 | The **ICD 9 / ICD 10** radio buttons allow the user to specify if the codes that will be entered in the following section are ICD 9 or ICD 10 codes. |
| DX # 1 - 8 | The **DX #** fields allow the user to enter up to eight Diagnosis Codes.  Note: Users can enter the code directly into the field or select the magnifying glass to perform a search of all diagnosis codes. |
| ICD Proc 1 - 4 | The **ICD Proc** fields allow the user to enter up to four ICD Procedure Codes.  Note: Users can enter the code directly into the field or select the magnifying glass to perform a search of all ICD procedure codes. |
| Svc From | The **Svc From** field allows the user to select the Service from Date from a calendar or enter the date in MM/DD/YYYY format. |
| Svc To | The **Svc To** field allows the user to select the Service to Date from a calendar or enter the date in MM/DD/YYYY format. |
| Procedure | The **Procedure** field allows users to enter the Procedure Code.  Note: Users can enter the code directly into the field or select the magnifying glass to perform a search of all procedure codes. |
| Mod 1 - 2 | The **Mod 1 - 2** fields allow the user to enter up to two Modifiers.  Note: Users can enter the code directly into the field or select the magnifying glass to perform a search of all modifiers. |
| Qty | The **Qty** field allow the user to enter the quantity amount. |
| Add Line Item | The **Add Line Item** button allows the user to add the selection to the results table. |
| Reset | The **Reset** fields removes all information from the Requested Services field prior to saving. |
| **Submit Authorization Screen** | |
| **Field Names** | **Attachments/ Clinical Information Section – Field Descriptions** |
|  | |
| Does Requesting Provider support approval of this request? | The **Does Requesting Provider support approval of this request?** Radio button allows the user to select if the provider submitting the authorization or referral request is in approval of the services being requested. |
| Clinical Information to Support Your Request (or reason for disagreement) | The **Clinical Information to Support Your Request** fields allow the user to enter the clinical information that supports or provides a disagreement reason for the authorization request.  Note: This is a required field for authorization submissions and optional for referrals. |
| Attachment | The **Attachment-1** field allows users to choose a file to be attached by clicking the “choose file” button (shown above). Once a file has been selected it will be displayed in the attachment field.  The red X (shown left) will clear the selected file. |
| Submit | The **Submit** button allow the user to submit the Authorization / Referral request. |
| Reset | The **Reset** button removes all information entered for the Authorization / Referral request, prior to saving. |

# **Claims Module**

The Claims Module allows users to search claims using specific search criteria.

## **Accessing the Claims Module**

Once logged into the system, select Claims from the dashboard.



The dropdown list for the Claims Module contains the following selection:



## **Search Claims**

Upon clicking the Claims Module, the Search Claim Popup Window will appear.

|  |  |  |  |
| --- | --- | --- | --- |
| **Claim Screen** | | | |
| **Field Names** | **Search Claim Section – Field Descriptions** | | |
|  | | | |
| Claim Number | | | The **Claim Number** field allows the user to enter the claim number as part of the search criteria. |
| Claims Status | | | The **Claims** **Status** dropdown list allows users to select the claim status from the dropdown list as part of the search criteria. |
| DOS From | | | The **DOS From** field allows users to select the date of service from using the calendar feature or by manually keying the date in as follows: MM/DD/YYYY |
| DOS To | | | The **DOS To** field allows users to select the date of service to using the calendar feature or by manually keying the date in as follows: MM/DD/YYYY |
| Member | | | The **Member** field allows the user to enter the member’s name (Last Name, First Name) or click the Find button (shown to the left) to select the member from the Member Search popup window as part of the search criteria. |
| Rendering Provider | | | The **Rendering Provider** field allows users to enter the name of the rendering provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria |
| Line Of Business | | | The **Line Of Business** dropdown list allows users to select the LOB as part of the search criteria. |
| IPA | | | The **IPA** dropdown list allows users to select the IPA as part of the search criteria. |
| Institutional Claim | | | The **Institutional Claim** check box allows users to select only institutional claims as part of the search criteria. |
| Professional Claim | | | The **Professional Claim** check box allows users to select only professional claims as part of the search criteria. |
| Search | | | The **Search** button allows users to launch the Claim Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected.  **Note: Clicking Search with no search criteria will return all results.** |
| Reset | | | The **Reset** button allows users to clear all data from the fields prior to saving. |
| **Claim Screen** | | | |
| **Field Names** | **Claims Results Section – Field Descriptions** | | |
|  | | | |
| Export | | The **Export** button allows the user to export the results data into an excel format. | |
| Results Table | | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. | |
| Claim Number | | The **Claim Number** hyperlink allows the user to open and view the claim details. | |

## Claims Information

**Claims Review Screen**

Upon double clicking on the selected claim from the grid, the claim review screen will be displayed. The user will be allowed to view the details of the member’s claim selected.

The claims review screen consists of the following collapsible sections: member’s information, member’s current coverage, claim header, provider or facility information, claim process detail, claim details, coordination of benefits, attachments, authorization information, anesthesia, ambulance, and check details.

**Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.**

|  |  |
| --- | --- |
| **Claims Review Screen** | |
|  | **Claim Header Section** |
| The **Claim Header** section allows the users to view the Claim Member’s Summary, the Claim Member’s Information, and the Claim Member’s PCP Information. | |

|  |  |
| --- | --- |
| **Claims Review Screen** | |
|  | **Provider or Facility Information Section** |
| The **Provider or Facility Information** section allows users to view the rendering and referring provider/facility information of the member’s claim. | |
| **Claims Review Screen** | |
|  | **Claim Process Detail Section** |
| The **Claim Line Items** section allows the users to view the details of a processed claim. | |

|  |  |
| --- | --- |
| **Claims Review Screen** | |
|  | **Claim Details Section** |
| The **Claim Codes** section contains Claim Codes and DX Codes. The Claim Codes section allows users to view the member’s claim detail information, along with the claim codes and dx codes on the claim. | |

|  |  |  |
| --- | --- | --- |
| **Claims Review Screen** | | |
|  | | **Coordination of Benefits Section** |
| The **Coordination of Benefits** section allows users to view COB’s on the member’s claim. | | |
| **Claims Review Screen** | | |
|  | **Check Details Section** | |
| The **Check Details** section allows users to view the check details on the member’s claim. This section will be present for all finalized claims. | | |

# **Providers Module**

The Provider Module allows users search providers using specific search criteria.

## **Accessing the Providers Module**

Once logged into the system, select Providers from the dashboard.



The dropdown list for the Providers Module contains the following selections:



## **Provider Search**

Upon clicking the Provider Module, the Provider Search Popup Window will appear.

|  |  |  |
| --- | --- | --- |
| **Provider Search Screen** | | |
| **Field Names** | **Provider Search Section – Field Descriptions** | |
|  | | |
| Search By | | The **Search By** field contains a dropdown list that can be utilized to narrow down a search to only display providers with specific criteria. Choices are: Any Name, Last Name, First Name, TIN, NPI, Provider Number and Organization Name. |
| Search For | | The **Search For** fields corresponds to the selection chosen in the *Search By* field.  **EX: Smith**  ***NOTE: An entry is required in this field, if a selection is made in the “Search By” field.*** |
| Line of Business | | The **Line of Business** dropdown list allows users to select a LOB as part of the search criteria. |
| IPA | | The **IPA** dropdown list allows users to select an IPA as part of the search criteria. |
| City | | The **City** field allows users to enter the city as part of the search criteria. |
| Zip Code | | The **Zip** Code field allows users to enter the zip code as part of the search criteria. |
| Specialty | | The **Specialty** dropdown list allows users to select a specialty as part of the search criteria. |
| Contract Status | | The **Contract Status** dropdown list allows users to select the contract status for the provider as part of the search criteria. |
| Par Provider | | The **Par Provider** radio button allows users to select only Par providers as part of the search criteria. |
| All (Par and Non-par) | | The **All** radio button allows users to select both Par and Non-Par providers as part of the search criteria. |
| Search | | The **Search** button allows users to launch the Provider Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected.  ***Note: Clicking Search with no search criteria will return all results.*** |
| Reset | | The **Reset** button allows users to clear all data from the fields prior to saving. |
| **Provider Search Screen** | | |
| **Field Names** | **Provider Results Section – Field Descriptions** | |
|  | | |
| Search Results | | The **Search Results** heading tells the users how many records are displayed in the results table. |
| Export | | The **Export** button allows the user to export the results data into an excel format. |
| Results Table | | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. |
| Previous | | The **Previous** button allows user to return to the previous page of the search results. |
| Next | | The **Next** button allows user to skip to the next page of the search results. |
| Edit Pencil | | The **Edit (Blue) Pencil** allows the user to open and view the message details. |

## **Provider Information**

**Provider Information Screen**

Upon double clicking on the selected provider from the grid, the provider information will populate into the provider information screen. The user can now view the Provider Information and the Provider Assignment Details.

***Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.***

|  |  |
| --- | --- |
| **Provider Information Screen** | |
|  | **Provider Information Section** |
| The Provider Information section allows the users to view the demographics of the Provider. | |
| **Provider Information Screen** | |
|  | **Provider Assignment Section** |
| The Provider Assignment section allows users to view the provider assignment plans. | |

## **Provider Notices Bulletins**

Provider Notices/Announcements allows users to search for notices and announcements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Search Announcements Screen** | | | |
| **Field Names** | **Announcement Section – Field Descriptions** | | |
|  | | | |
| Message | | | The **Message** field allows users to search by the message entered. |
| Search | | | The **Search** button allows the user to launch the Provider Notices/Announcements search based on the criteria selected/entered. The results table will be populated below with the respective data fields selected.  ***Note: Clicking Search with no search criteria will return all results.*** |
| Reset | | | The **Reset** button allows users to clear all data from the fields prior to saving. |
| **Provider Notices/ Announcements Screen** | | | |
| **Field Names** | **Provider Notices/Announcements Results Section – Field Descriptions** | | |
|  | | | |
| Results Table | | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. | |

# **Administration**

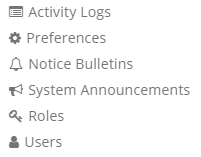
The administration module allows users with administrative privileges to manage user accounts in the Provider Portal. The user will have access to create, terminate or update a user level account details. The user will have access to view the activity log and set up the system’s preferences.

## **Accessing the Administration Module**

Once logged into the system, select Administration dropdown list from the dashboard.



The dropdown list for Administration Module contains the following selections:



## **Activity Log**

Administrators have full access to view activities through the Activity Log feature.

|  |  |  |
| --- | --- | --- |
| **Administration Activity Log Screen** | | |
| **Field Names** | **Activity Log Search Section – Field Descriptions** | |
|  | | |
| Role Area | | The **Role Area** dropdown list allows users to select the module or section of the provider portal to include as part of the search criteria. |
| Action | | The **Action** dropdown list allows users to select the type of action to include as part of the search criteria. |
| User Name | | The **User Name** field allows users to enter a username as part of the search criteria. |
| First Name | | The **First Name** button allows users to enter the user’s first name as part of the search criteria. |
| Last Name | | The **Last Name** button allows users to enter the user’s last name as part of the search criteria. |
| From Date | | The **From Date** field allows users to select the “from date” of the activity log as part of the search criteria, by either using the calendar, or manually entering the date in the following format: MM/DD/YYYY. |
| To Date | | The **To Date** field automatically defaults to the current date in the MM/DD/YYYY format. |
| Search | | The **Search** button allows users to launch the Activity Log Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected.  **Note: Clicking Search with no search criteria will return all results.** |
| Reset | | The **Reset** button allows users to clear all data from the fields prior to saving. |
| DB LOGS | | The **DB LOGS** button allows users to view the database logs. |
| **Administration Activity Log Screen** | | |
| **Field Names** | **Activity Log Search Results Section – Field Descriptions** | |
|  | | |
| Search Results | | The **Search Results** heading tells the users how many records are displayed in the results table. |
| Results Table | | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. |

## Preferences

Preferences allows specific users to edit the system settings, such as the site theme, health plan logo, authorization and claim guidelines, privacy policy, terms of use, and grace periods.

### ***Account***

Account allows users to update the health plan logo, change the site theme, provide the contact information, and create login announcements.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Account Section – Field Descriptions** | |
|  | | |
| Account Name | | The **Account Name** field displays the health plan and site name. |
| Theme | | The **Theme** drop-down list allows users to select and update the site’s theme. |
| Health Plan Logo | | The **Health Plan Logo** section allows users to select and upload a logo image file, which will be displayed in the **Preview Logo** section of the screen. |
| Contact Email | | The **Contact Email** field allows users to enter the contact email for portal support. |
| Contact Phone | | The **Contact Phone** field allows users to enter the contact phone number for portal support. |
| Login Announcement | | The **Login Announcement** field allows users to enter an announcement that will be viewed each time that a user logs into the portal. |

### ***Auth: Request Guidelines***

The Auth: Request Guidelines sections allow users to enter the guidelines for authorization submissions.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Auth: Request Guidelines Section – Field Descriptions** | |
|  | | |
| Submission Guidelines for Authorization Appeal | | The **Submission Guidelines for Authorization Appeal** field allows users to enter the guidelines for submitting authorization appeals. |
| Submission Guidelines for Authorization Extension Request | | The **Submission Guidelines for Authorization Extension Request** field allows users to enter the guidelines for submitting authorization extensions. |
| Submission Guidelines for Authorization Modification Request | | The **Submission Guidelines for Authorization Modification Request** field allows users to enter the guidelines for submitting authorization modifications. |
| Submit | | The **Submit** button allows users to submit changes to the Auth: Request Guidelines fields. |
| Reset | | The **Reset** button allows users to clear all data from the fields prior to saving. |

### ***Auth: Pick One for Me***

The Auth: Pick One for me section allows users to specify the “Pick one for me” options.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Auth: Pick One for Me Section – Field Descriptions** | |
|  | | |
| Pick One for Me (Requested Provider/ Facility) | | The **Pick One for Me (Requested Provider / Facility)** checkbox allows users to select if the system will pick a requested provider or facility. |
| Submit | | The **Submit** button allows users to submit changes to the Auth: Pick One for Me checkbox. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Auth: Ordering Provider Degrees***

The Ordering Provider Degrees allow users to specify the ordering provider’s degree.

***Note: Used for vendor users.***

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Auth: Ordering Provider Degrees Section – Field Descriptions** | |
|  | | |
| Ordering Provider Degrees (For Vendor User) | | The **Ordering Provider Degrees (For Vendor User)** allows users to select one or more provider degrees. |
| Submit | | The **Submit** button allows users to submit changes to the Auth: Pick One for Me checkbox. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Authorization Submission***

The Authorization Submission section allows users to specify if authorizations can only be submitted by the Member’s Primary Care Physician (PCP).

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Auth: Pick One for Me Section – Field Descriptions** | |
|  | | |
| Only Allow PCP To Submit Authorization | | The **Only Allow PCP To Submit Authorization** checkbox allows users to select if authorizations can only be submitted by the Member’s Primary Care Physician (PCP). |
| Submit | | The **Submit** button allows users to submit changes to the Auth: Pick One for Me checkbox. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Claim: Request Guidelines***

The Claim: Request Guidelines section allows users to enter claim submission guidelines.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Claim: Request Guidelines Section – Field Descriptions** | |
|  | | |
| Submission Guidelines for Claim Appeal | | The **Submission Guidelines for Claim Appeal** field allows users to enter the guidelines for submitting claims appeals. |
| Submit | | The **Submit** button allows users to submit changes to the submission guidelines field. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Member PCP Search***

The Member PCP Search functionality grants specific access to Member Search results for the selected user types.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Member PCP Search Section – Field Descriptions** | |
|  | | |
| Physician User, Facility User, Vendor User, IPA User | | The **Physician User, Facility User, Vendor User and IPA User** checkboxes allow selected user types to view any member from Member Search with either Member ID number OR the Member’s First Name, Last Name, DOB, and Medicare ID# as search criteria.  Deselected checkboxes prevent user types from viewing members in search with either Member ID number OR the Member’s Name, DOB, and Medicare ID # entered, unless the user is a System Administrator of a Physician Admin with a Physician/Provider assigned to the logged in user that is a PCP. |
| Submit | | The **Submit** button allows users to submit changes to the submission guidelines field. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Privacy Policy***

The Privacy Policy section allows users to enter the text for the Privacy Policy.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Privacy Policy Section – Field Descriptions** | |
|  | | |
| Privacy Policy | | The **Privacy Policy** field allows users to enter the Privacy Policy for the portal. |
| Submit | | The **Submit** button allows users to submit changes to the Privacy Policy field. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Provider Grace Period***

The Provider Grace Period section allows users to specify the number of days in which a provider will be able to view member, claim, and authorization information.

For example: Grace period = 30.

Member – Effective date: 03/01/2017; Termination Date: 03/31/2017; Today’s date: 04/15/2017.

In this case, the system will consider the termination date to be 04/30/2017. User will be able to submit and view authorizations even though the member has been terminated. If today’s date was 05/15/2017, then provider won’t be able to view and submit the Member’s authorization.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Provider Grace Period Section – Field Descriptions** | |
|  | | |
| Provider Grace Period | | The **Provider Grace Period** field allows users to select the total number of days from the drop-down list. |
| Submit | | The **Submit** button allows users to submit changes to the grace period. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***Terms of Use***

The Terms of Use text entered will be prompted to the user after successfully logging into the portal.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Terms of Use Section – Field Descriptions** | |
|  | | |
| Terms of Use | | The **Terms of Use** field allows users to enter the Terms of Use text that will be displayed to portal users. |
| Submit | | The **Submit** button allows users to submit changes to the Terms of Use field. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***User Denial Reason***

The User Denial Reason section allows the user to configure the reason(s) the user was denied access to the system.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Provider Grace Period Section – Field Descriptions** | |
|  | | |
| Reason | | The **Reason** field allows users to enter the specific denial reason for access. |
| Add | | The **Add** button adds the reason to the Reason results. |
| Submit | | The **Submit** button allows users to submit changes to the grace period. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

### ***User Grace Period***

The User Grace Period section allows the user to specify the number of days given for an Authorized User’s grace period.

|  |  |  |
| --- | --- | --- |
| **Administration Preferences Screen** | | |
| **Field Names** | **Provider Grace Period Section – Field Descriptions** | |
|  | | |
| Authorized User Grace Period | | The **Authorized User Grace Period** field allows users to select the total number of days from the drop-down list. |
| Submit | | The **Submit** button allows users to submit changes to the grace period. |
| Reset | | The **Reset** button allows users to clear changes prior to saving. |

## **Notices/Announcements**

Notices/Announcements allows users to create announcement messages and send them to select user recipients or create and manage distribution lists.

|  |  |  |  |
| --- | --- | --- | --- |
| **Create Notices / Announcements Screen** | | | |
| **Field Names** | **Announcement Section – Field Descriptions** | | |
|  | | | |
| Distribution List | | | The **Distribution List** dropdown list allows users to select from already created lists to send the announcement message to. |
| Manage | | | Selecting the **Manage** button opens a Manage Distribution List popup window, which allows users to create distribution lists by entering a **Name** for the list and assigning corresponding **Users.**    Select **Save** to create the distribution lists with the completed required fields.  Select **Reset** to clear the values from the fields prior to saving. |
| Recipient(s) | | | The **Recipient(s)** field allows users to enter one or more recipient names to send a message.  Note: Required field |
| Tags | | | The **Tags** field allows users to enter a tag on the notice/announcement. |
| Message | | | The **Message** field allows users to enter the details of the message being sent.  ***Note: Required field*** |
| Send | | | The **Send** button allows users to send the message to the entered recipient(s). |
| Reset | | | The **Reset** button allows users to clear all data from the fields prior to saving. |
| **Administration Announcement Screen** | | | |
| **Field Names** | **Announcement Results Section – Field Descriptions** | | |
|  | | | |
| Is Deactivate? | | The **Is Deactivate?** checkbox allows users to deactivate the message so that it is no longer displayed for the indicated recipients. | |
| Results Table | | The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header. | |

## **Roles**

User can add a new role or choose the existing roles. Roles are tied to permissions which allows the users to navigate through the portal.

|  |  |  |
| --- | --- | --- |
| **Administration Roles Screen** | | |
| **Field Names** | **Search Roles Section – Field Descriptions** | |
|  | | |
| Add New Role | | The **Add New Role** button allows specific users to create new roles. The fields will be described in the following table. |
| Name | | The **Name** field allows users to narrow down the search criteria by entering a name. |
| Description | | The **Description** field allows users to narrow down the search criteria by entering a description of the role. |
| Number of Users | | The **Number of Users** field allows displays the number of users assigned to the role. |
| Add Date | | The **Add Date** field allows users to narrow down the search criteria by entering a date. |
| Add By | | The **Add By** field allows users to narrow down the search criteria by entering a date. |
| Last Modified Date | | The **Last Modified Date** field allows users to narrow down the search criteria by entering a date. |
| Last Modified By | | The **Last Modified By** fields allows users to narrow down the search criteria by entering a user name. |
| Delete Icon | | The **Delete Icon** (red trash can) allows specific users to delete the selected user role. |
| Edit Icon | | The **Edit Icon** (blue pencil) allows specific users to edit/update the selected user role. |

### ***Add New Role***

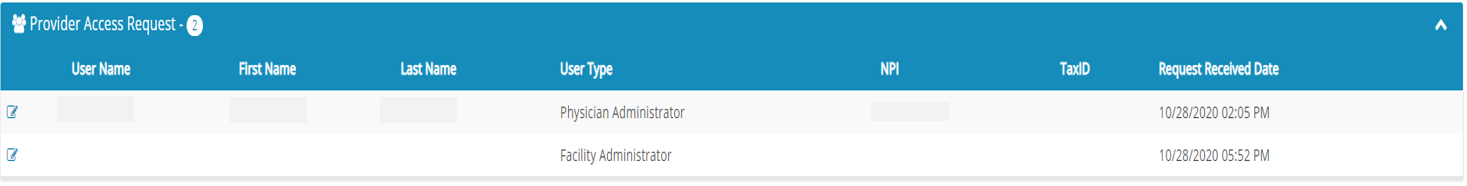
The Add New Role allows the user to create a new role. The user will need to enter the Role Name, the Role description and select the permissions needed for the role.

|  |  |  |
| --- | --- | --- |
| **Administration Roles Screen** | | |
| **Field Names** | **Add Roles Section – Field Descriptions** | |
|  | | |
| Name | | The **Name** field allows users to enter a name for the role. |
| Description | | The **Description** field allows users to enter a description for the role. |
| Select Permissions | | The **Select Permission** section allows users to select the user’s access within each module and section of the Provider Portal. User Roles are created with specific accesses that include: Read only, Create, Update, Delete, or ALL, among others settings per the corresponding modules. |
| Submit | | The **Submit** button allows users to submit the changes to the role. |
| Reset | | The **Reset** button allows users to clear all data from the fields prior to saving. |

## **Users**

When a new user is creating an account in Provider Portal, then the user needs to request access, as described in the “How to Request Access to the Provider Portal” section.

Admin will be able to see the list of users requesting access under the ‘Provider Access Request’ section.



Admin can select the Edit Icon (Blue pencil) to open the request and will now be able to assign a ‘Role’ to the user from the “Role Name” dropdown list. Proceed to hit “Approve” if the request is valid or select “Deny” if invalid.

Note: The user requesting access to the provider portal will receive an email confirmation.

