Provider Portal Manual

for

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Provider Portal 3.0

The Provider Portal, powered by HealthAxis is used by Beacon Health Solutions, the third-party administrator for Care n' Care of North Carolina's products: HealthTeam Advantage and Teal Premier.

This portal is a quick resource that allows Providers convenient access to member benefits and eligiblilty details and claim information.

How to Access the Provider Portal

Enter the following link.

Link:

https://htaprovider.prod.healthaxis.net/login

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

- **ONLY the provider/practice/vendor administrator should request access. Individual staff members will be provided access by their provider/practice/vendor administrator. Any individual staff members that request access individually, will be denied.**

Login credentials:

Should be emailed to you or provided by your supervisor or Systems Administrator

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: **ONLY the provider/practice/vendor administrator should request access. Individual staff members will be provided access by their provider/practice/vendor administrator. Any individual staff members that request access individually, will be denied.**

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, but vendor administrator is the option you should choose.

Provider Portal Access Request Screen

Field Names	Select Provider Type Section – Field Descriptions
Vendor Administrator/Group 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. This user can also determine roles within the practice, and create/update/manage all portal users at their practice.
Facility Administrator	**Do Not Use: Facility Administrator** radio button should be selected for Facility/Hospital Administrator level access.
Physician Administrator	**Do Not Use: Physician Administrator** radio button should be selected for setting up an individual provider their own level access. This user type will have access to information limited to their members only.
IPA Administrator	**Do Not Use: 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.
First Name	Enter **First Name** of the user. Note: Required field.
Last Name	Enter **Last Name** of the user. Note: Required field.
Middle Initial	Enter **Middle Initial** of the user, if applicable.
Date of Birth	The **Date of Birth** allows the user to enter the correct birth date by either using the calendar, or manually entering the date in the following format: MM/DD/YYYY.
Email	Enter an **Email Address** for the user. 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.
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.
Submit	Select **Submit** when all required fields are completed.
Reset	Select **Reset** to clear the fields and re-start the form.

Once the 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.

** Be sure to check that this notification did not go into a junk/spam email folder.**
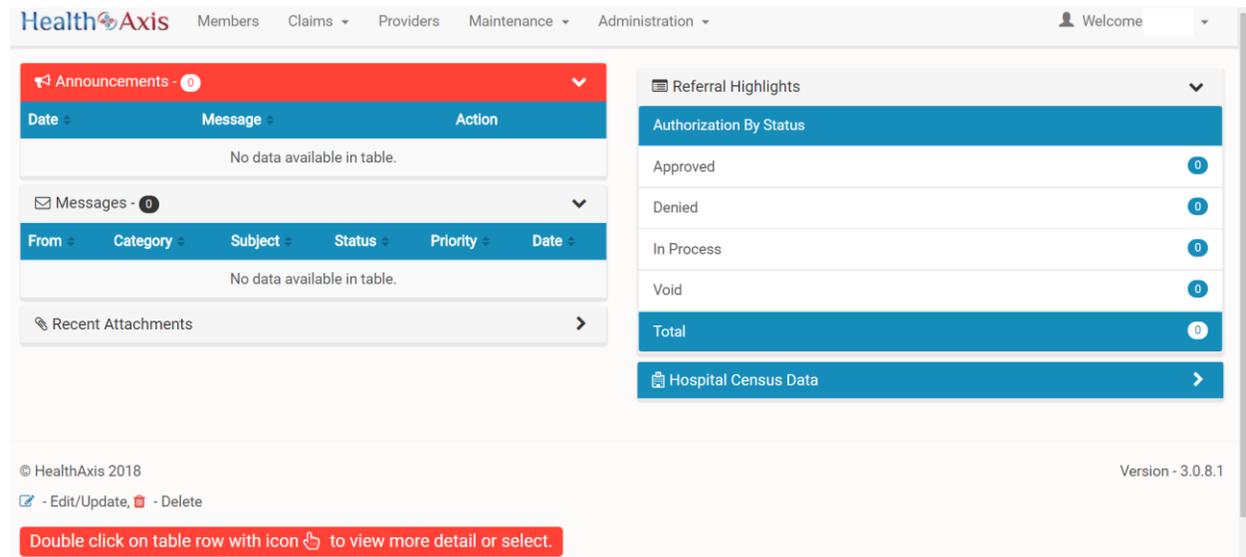
User Types Hierarchy

1. **Administrator (Vendor Administrator is for a practice, provider, facility or ancillary provider)** – There can only be one (1) Administrator per NPI/Tax ID. Only the Administrator can complete the Request Access Form (login screen).

2. **Provider Authorized Users (can be set up for billing staff, front office staff, providers, etc.)** – These are individual staff members that the administrator creates and approves access for.

Dashboard

The Dashboard is the landing page displayed once the user logs into the portal. The dashboard gives the user an overview of Announcements, Messages, and Recent Attachments.

Please note screenshots provided may show additional portal functions that are not active at this time.

Members Module

The Member Module allows users with specific access to search and view member details for benefits, eligibility and claims level details.

Accessing the Member Module

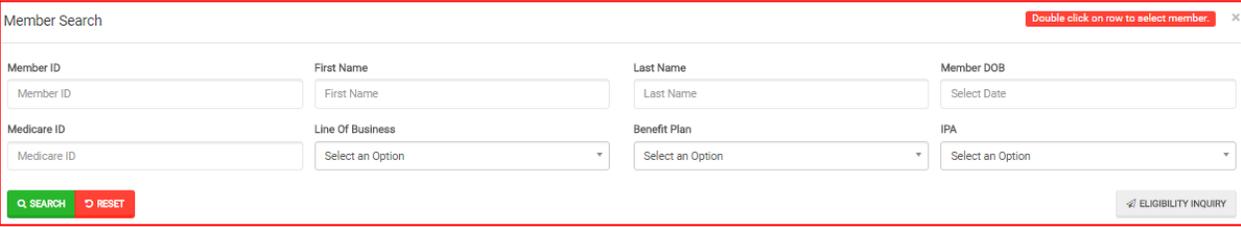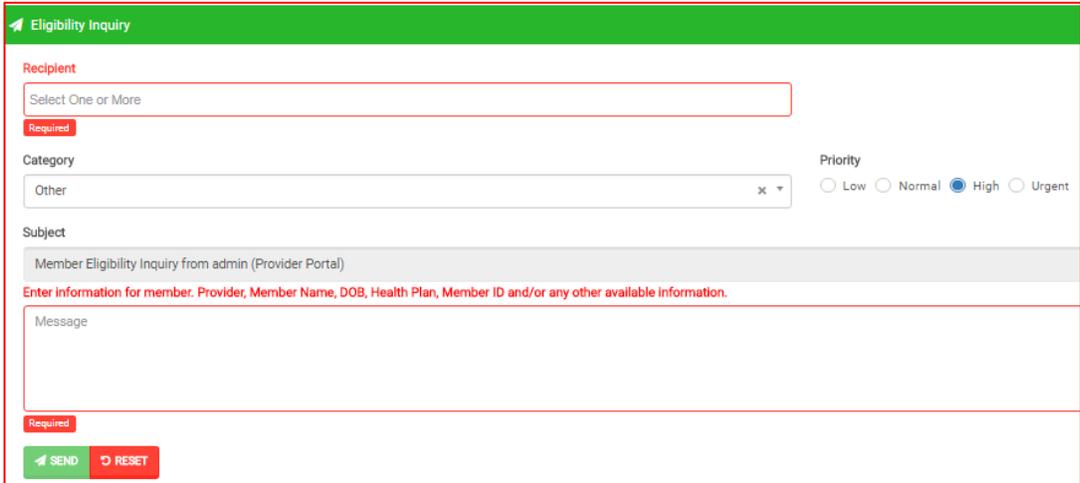Once logged into the system, select Members from the dashboard.
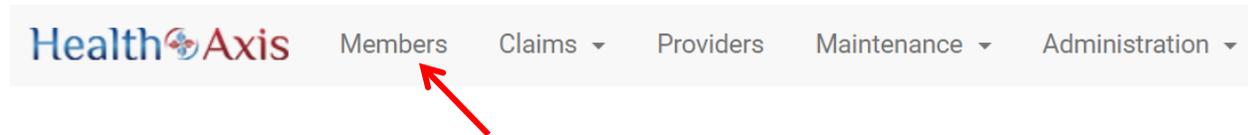
Member Search

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 view members that are tied to the PCP or can search by Member ID and other available criteria.
- User – Facility/Vendor: Can search for all members but will need to enter Member ID and DOB or Medicare ID number.
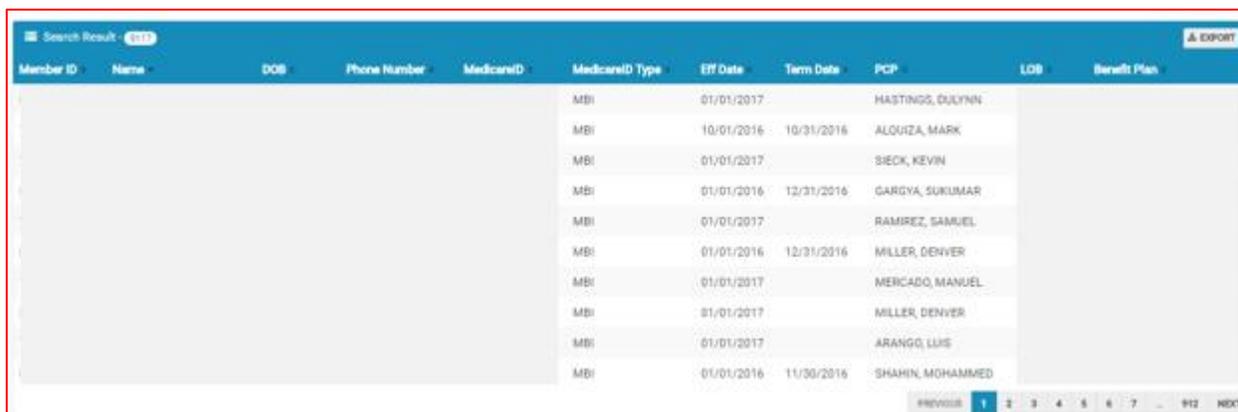
Member Screen	
Field Names	**Member Search Section – Field Descriptions**
Member ID	The **Member ID** allows users to enter the Member's ID number.
First Name	The **First Name** field allows users to enter the member's First Name.
Last Name	The **Last Name** field allows users to enter the member's Last 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.
Eligibility Inquiry	The **Eligibility Inquiry** button allows users to send an inquiry requiring a member's eligibility. Upon clicking the eligibility inquiry button, the eligibility inquiry screen will appear as seen below: Users can enter the recipient, category, priority and message. Upon clicking the send button, the inquiry will be sent to the recipient entered.

Member Search Screen

Field Names	Member 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.
Member ID	The **Member ID** hyperlink allows the user to open and view the Member Details.

Member Information

Upon double 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.

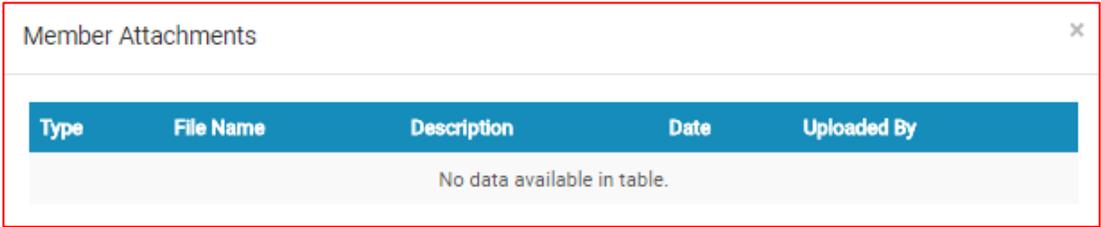| **Member Information Screen** |
|---|
| **Current Coverage Section** |
| |
| The **Current Coverage** section allows users with specific access to view all active members' coverage. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited. |

Member Information Screen

<table>
<tr><td></td><td align="center">Coverage History Section</td></tr>
</table>

Coverage History						
Health Plan	Line Of Business	Benefit Plan	Benefit Plan ID	Effective Date	Term Date	Status
				01/01/2017		Activated
				01/01/2016	12/31/2016	History
				01/01/2015	12/31/2015	History

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

<table>
<tr><td></td><td align="center">IPA/PCP History Section</td></tr>
</table>

IPAPCP History							
IPA Eff Date	IPA Term Date	IPA	PCP Eff Date	PCP Term Date	PCP ID	PCP Name	Status
			01/01/2015			HASTINGS, DULYNN	Activated

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

<table>
<tr><td></td><td align="center">Coordination of Benefits Section</td></tr>
</table>

Coordination of Benefits							
Policy Number	Plan Name	Type	Plan Group	Eff Date	Term Date	Verified	MSP Code
			No data available in table.				

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**
Claim	The **Claim** button allows users to view all claims tied to the selected member. Choices are:
Attachments	The **Attachments** button allows users to view/download all attachments tied to the selected member. Upon clicking the attachment button, the following popup window will appear.
HCC/Star	Future enhancement.
Outreach	Future enhancement.
Print	The **Print** button allows users to print the member information screen.

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.
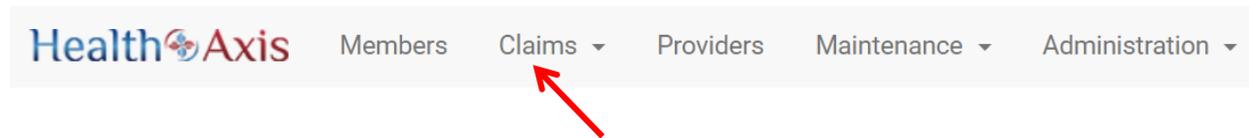
The dropdown list for the Claims Module contains the following selections:
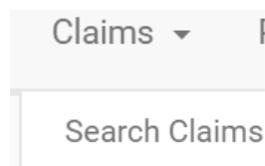
Search Claims

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

Claim Screen	
Field Names	**Search Claim Section – Field Descriptions**
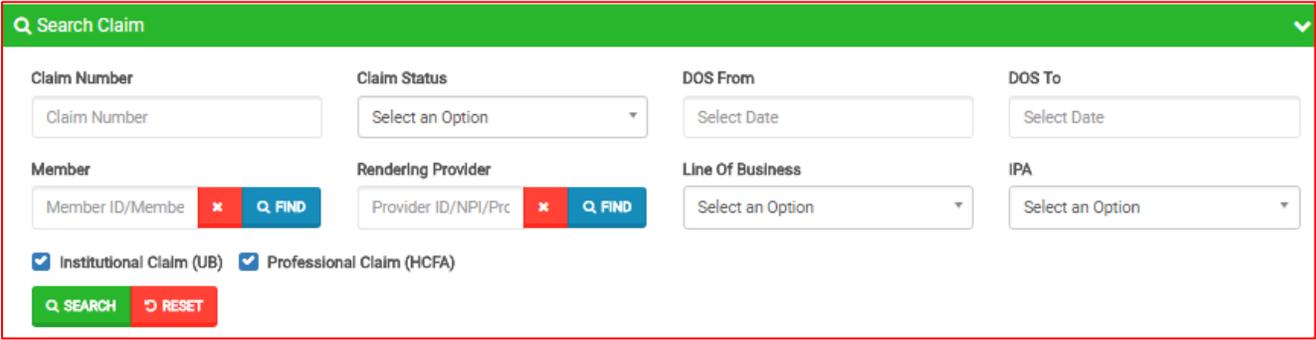
Claim Number	The **Claim Number** field allows the user to enter the claim number as part of the search criteria.
Claims Status	The **Claims Status** dropdown list allows users to select the claim status from the dropdown list as part of the search criteria.
DOS From	The **DOS From** field allows users 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	**Q FIND** 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	**Q FIND** 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
LOB	The **LOB** 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	
	Member Information Section

The member information section allows users to view the member's demographic information.

Claims Review Screen

Current Coverage Section

The Current Coverage Section allows users to view the member's current coverage details.

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

	Status	Svc From	Svc To	CPT	Mod1	Mod2	Mod3	Mod4	POS	ICD Dx	QTY	Freq Type	Billed	Allowed	Adjusted	Prim
1	Approved	05/07/2018	05/07/2018	77067	TC				49	A	1	Unit	$311.50	$103.21	$0.00	$0.0
Reason		F0001 - PAYMENT BASED ON FEE SCHEDULE														
2	Approved	05/07/2018	05/07/2018	77080	TC				49	B,C	1	Unit	$127.00	$32.91	$0.00	$0.0
Reason		F0001 - PAYMENT BASED ON FEE SCHEDULE														
												Total	$438.50	$136.12	$0.00	$0.0

The **Claim Line Items** section allows the users to view the details of a processed claim.

Claims Review Screen

Claim Details Section

The **Claim Details** section contains two sub sections: Claim Codes and DX Codes. The Claim Details 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

	Authorization Information Section

The **Authorization Information** section allows users to view authorization information on the member's claim.

Claims Review Screen

	Anesthesia Section

The **Anesthesia** section allows users to view anesthesia information on the member's claim.

Claims Review Screen

	Ambulance Section

The **Ambulance** section allows users to view ambulance information on the member's claim.

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.
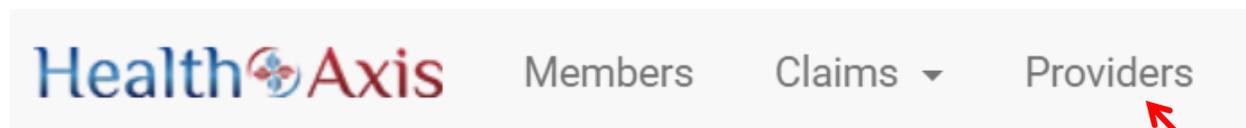
Provider Search

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.
Locality	The **Locality** dropdown list allows users to select a locality 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

Provider Information					
Provider ID	P00001204	Address 1	1200 N. Elm St.	National Provider ID	1053429373
Degree	NP	Address 2		Taxonomy ID	
Name	Smith, David J	City	Greensboro	Language	
Gender		State	NC	Phone	(336) 832-8040
Organization Name		Zip Code		Fax	(336) 832-8099

The Provider Information section allows the users to view the demographics of the Provider.

Provider Information Screen
Provider Assignment Section

| Provider Assignment									
Assignment Plan ID	Line of Business	IPA	Network	Billing Address	City, State & Zip	Type	Effective Date	Term Date	Status
PA2018043008421238832118	HTAMCR		HTA_PAR				01/01/2016		Active

The Provider Assignment section allows users to view the provider assignment plans.
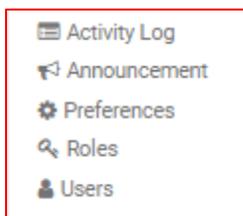
Administration

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.

Accessing the Administration Module

Once logged into the system, select Administration dropdown list from the dashboard.
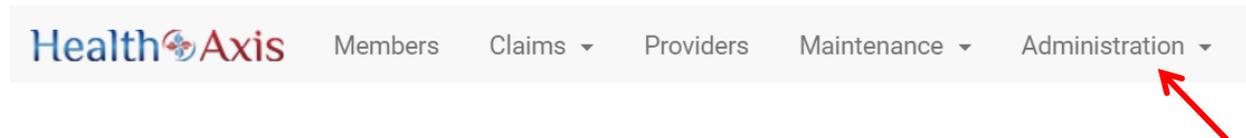
The dropdown list for Administration Module contains the following selections:

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.

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.

Announcements

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

Administration Announcement 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
Announcement Message	The **Announcement 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?	Message	Recipients	Last Modified By ⇕	Last Modified Date ▾
☐	test123	jortiz	jortiz	05/02/2018 11:47:53 AM

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.
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.

Field Names	Add Roles Section – Field Descriptions
Administration Roles Screen	

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.