



## **Provider Portal 3.0 Manual**

### **Health Axis 3.0 Provider Portal User Guide**

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# Health Axis 3.0 Provider Portal



## Provider Portal 3.0

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 and Payment status as well as a member's benefits and eligibility.

### How to Access the Provider Portal

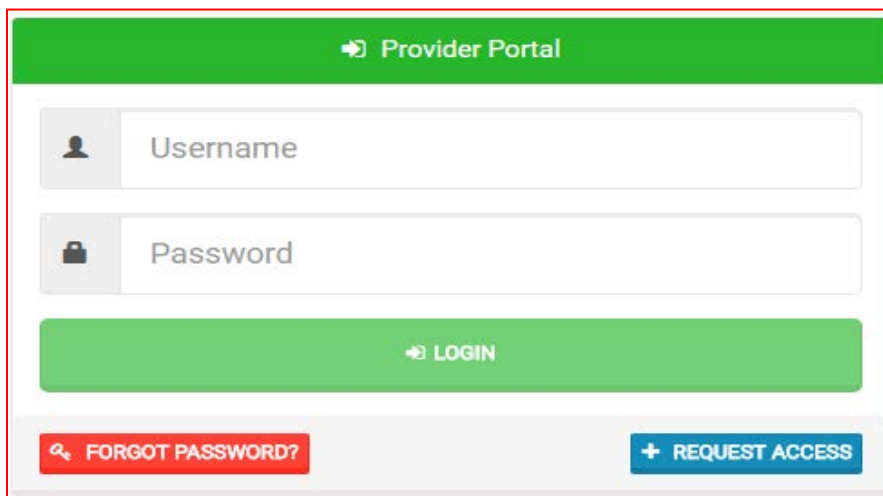
Enter the following link.

**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.**

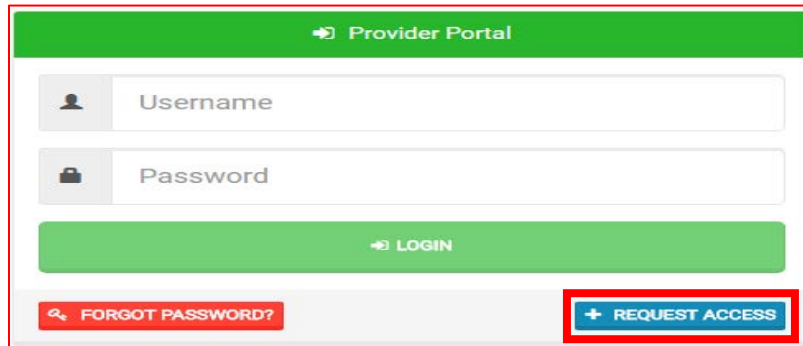


The screenshot shows the Provider Portal login interface. At the top, there is a green header with a home icon and the text "Provider Portal". Below the header are two input fields: "Username" with a person icon and "Password" with a lock icon. A green "LOGIN" button is positioned below the password field. At the bottom, there are two buttons: a red "FORGOT PASSWORD?" button with a magnifying glass icon and a blue "+ REQUEST ACCESS" button.

#### Login credentials:

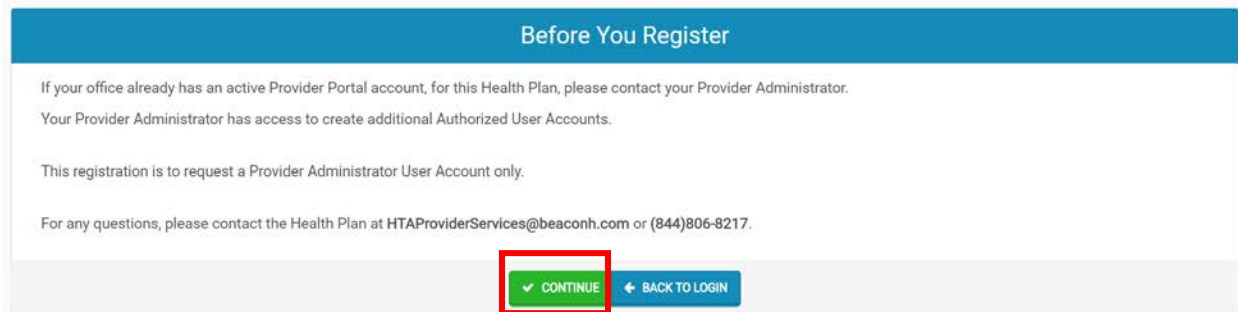
Should be emailed to you or provided by your supervisor or Systems Administrator

## How to Request Access to the Provider Portal



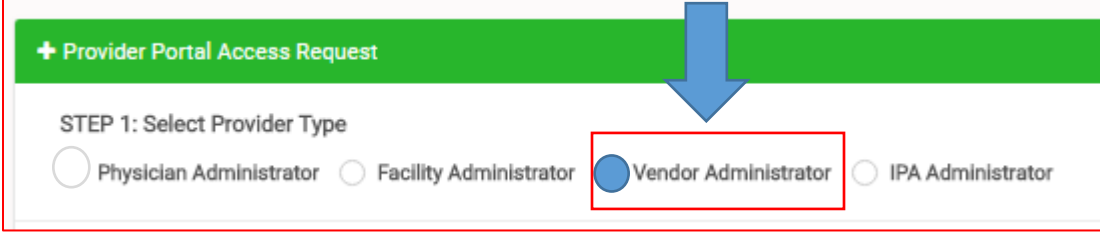

Click the “Request Access” button and the screen below will be displayed. Select “Continue” to proceed. Selecting “Back to Login” will return to the log-in page.

- **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
	
<p>Vendor Administrator/Group Administrator</p>	<p>The <b>Vendor Administrator</b> 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.</p>
<p>Facility Administrator</p>	<p>The <b>Facility Administrator</b> radio button should be selected for Facility/Hospital Administrator level access.</p>
<p>Physician Administrator</p>	<p><b>Physician Administrator</b> 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.</p>
<p>IPA Administrator</p>	<p>The <b>IPA Administrator</b> radio button should be selected for IPA Administrator level access.</p>
Field Names	Enter Tax ID or NPI Section – Field Descriptions
	
<p>Tax ID</p>	<p>In the <b>Tax ID</b> 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.”</p>
<p>NPI</p>	<p>In the <b>NPI</b> field, enter the appropriate NPI (National Provider Identifier) number; this field is displayed for Physician Administrators and Facility Administrators only.</p>

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**

STEP 3: Create a User Name & Password

<b>User Name</b>	<b>Password</b>	<b>Re-Enter Password</b>
<input type="text" value="User Name"/>	<input type="text" value="Password"/>	<input type="text" value="Re-Enter Password"/>
<b>Required</b>	<b>Required</b>	<b>Required</b>

**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**

STEP 4: Enter Demographic Information

<b>Salutation</b>	<b>First Name</b>	<b>Last Name</b>	<b>Middle Initial</b>	
<input type="text" value="Select an Option"/>	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="MI"/>	
	<b>Required</b>	<b>Required</b>		
<b>Date of Birth</b>	<b>Email</b>	<b>Phone Number</b>	<b>Ext</b>	
<input type="text" value="Select Date"/>	<input type="text" value="Email"/>	<input type="text" value="( ) - -"/>	<input type="text" value="Ext"/>	
	<b>Required</b>	<b>Required</b>		
<b>Address 1</b>	<b>Address 2</b>	<b>City</b>	<b>State</b>	<b>Zip Code</b>
<input type="text" value="Address 1"/>	<input type="text" value="Address 2"/>	<input type="text" value="City"/>	<input type="text" value="Select an ..."/>	<input type="text" value="Zip Code"/>
<b>Required</b>		<b>Required</b>	<b>Required</b>	<b>Required</b>
<b>Organization Name</b>	<b>Role/Title</b>			
<input type="text" value="Organization Name"/>	<input type="text" value="Role/Title"/>			
<b>Required</b>	<b>Required</b>			

**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 <b>Middle Initial</b> of the user, if applicable.
Date of Birth	The <b>Date of Birth</b> 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 <b>Email Address</b> for the user. Note: Required field.
Phone Number	Enter a <b>Phone Number</b> for the user. Note: Required field.
Ext	Enter an extension for the user's phone number, if applicable.
Address 1	Enter the user's <b>Address</b> . Note: Required field.
Address 2	Continue entering <b>Address</b> from Address 1 field, if applicable.
City	Enter the <b>City</b> into the field. Note: Required field.
State	Select the <b>State</b> from the drop-down list. Note: Required field.
Zip Code	Enter a valid <b>Zip Code</b> . Note: Required field.
Organization Name	Enter the <b>Organization Name</b> into this field. Note: Required field.
Role/Title	Enter the user's <b>Role</b> or <b>Title</b> into this field. Note: Required field.
Submit	Select <b>Submit</b> when all required fields are completed.
Reset	Select <b>Reset</b> 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.

The screenshot displays the HealthAxis dashboard with the following components:

- Navigation Bar:** HealthAxis logo, Members, Claims, Providers, Maintenance, Administration, and a Welcome message.
- Announcements:** A table with columns Date, Message, and Action. It shows "No data available in table."
- Messages:** A table with columns From, Category, Subject, Status, Priority, and Date. It shows "No data available in table."
- Recent Attachments:** A link to view recent attachments.
- Referral Highlights:** A section titled "Authorization By Status" with a table:
 

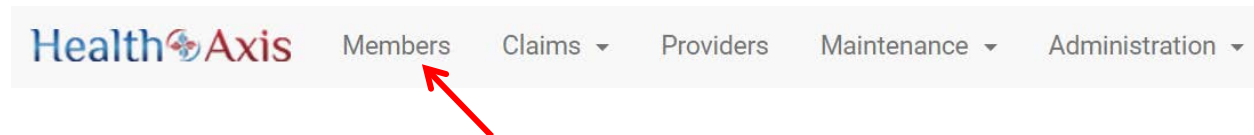
Approved	0
Denied	0
In Process	0
Void	0
<b>Total</b>	<b>0</b>
- Hospital Census Data:** A link to view hospital census data.
- Footer:** © HealthAxis 2018, Version - 3.0.8.1, and a note: "Double click on table row with icon to view more detail or select."

## 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.

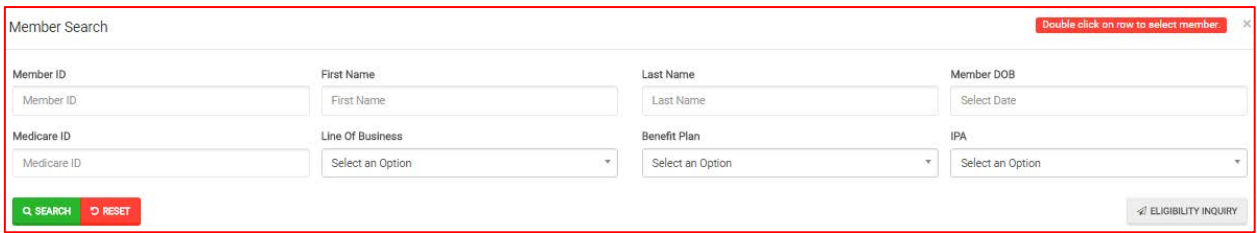


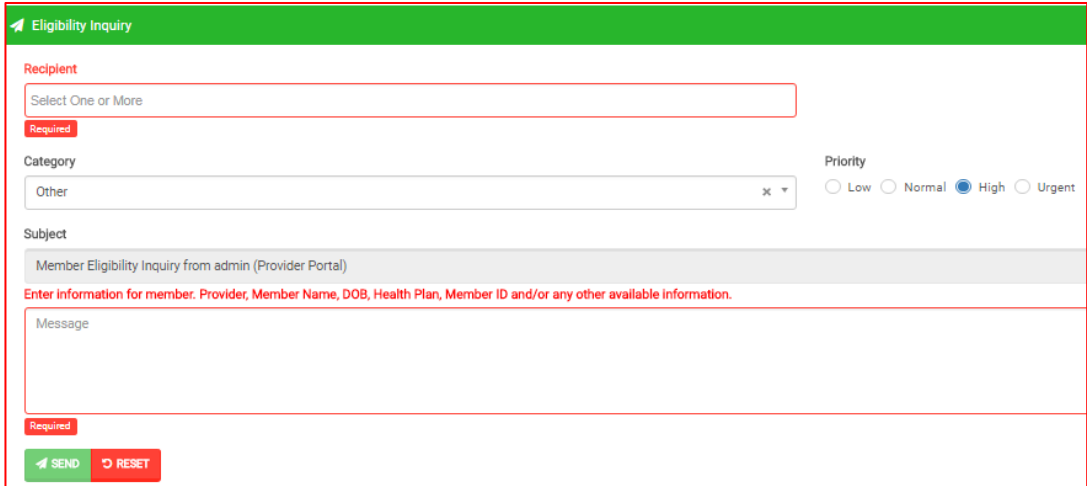
### Member Search

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.

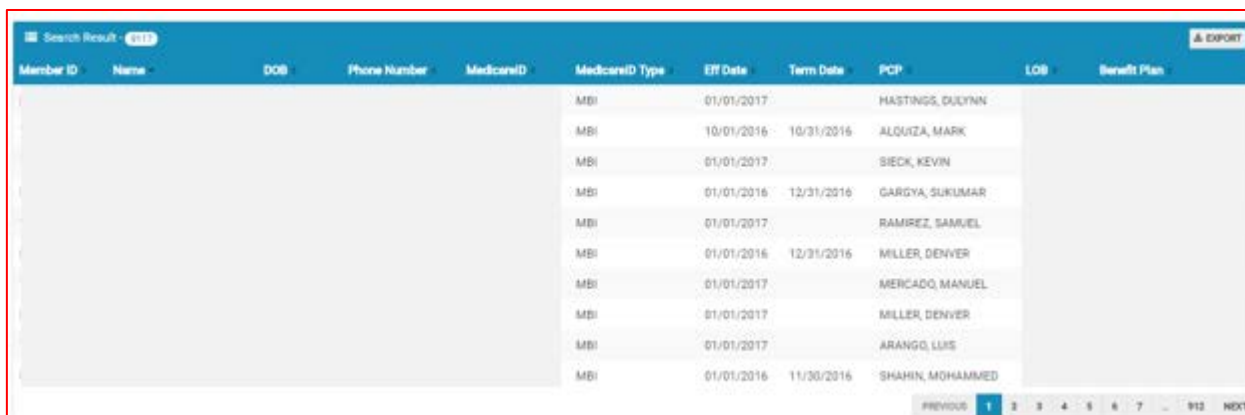
Member Screen	
Field Names	Member Search Section – Field Descriptions
	
Member ID	The <b>Member ID</b> allows users to enter the Member’s ID number.
First Name	The <b>First Name</b> field allows users to enter the member’s First Name.
Last Name	The <b>Last Name</b> field allows users to enter the member’s Last Name.
Member DOB	The <b>Member DOB</b> 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 <b>Medicare ID</b> field allows users to enter the Medicare Beneficiary Identifier (MBI) as part of the search criteria.

Line of Business	The <b>Line of Business</b> field allows users to narrow the member search by selecting a line of business from the dropdown list.
Benefit Plan	The <b>Benefit Plan</b> field allows users to narrow the member search by selecting a benefit plan from the dropdown list.
IPA	The <b>IPA</b> field allows users to narrow the member search by selecting an IPA from the dropdown list.
Search	The <b>Search</b> button allows users to launch the search functionality, based on criteria selected. The results will populate below the search section.
Reset	The <b>Reset</b> button allows users to clear all data from the fields prior to saving.
Eligibility Inquiry	<p>The <b>Eligibility Inquiry</b> 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:</p>  <p>Users can enter the recipient, category, priority and message. Upon clicking the send button, the inquiry will be sent to the recipient entered.</p>

## Member Search Screen

### Field Names

### Member Results Section – Field Descriptions



Member ID	Name	DOB	Phone Number	MedicareID	MedicareID Type	Eff Date	Term Date	PCP	LOB	Benefit Plan
						01/01/2017		HASTINGS, DUDYNN		
						10/01/2016	10/31/2016	ALDUZA, MARK		
						01/01/2017		SIECK, KEVIN		
						01/01/2016	12/31/2016	GARGYA, SUKUMAR		
						01/01/2017		RAMIREZ, SAMUEL		
						01/01/2016	12/31/2016	MILLER, DENVER		
						01/01/2017		MERCADO, MANUEL		
						01/01/2017		MILLER, DENVER		
						01/01/2017		ARANGO, LUIS		
						01/01/2016	11/30/2016	SHAHN, MOHAMMED		

Search Results	The <b>“Search Results”</b> heading tells the users how many records are displayed in the results table.
Export	The <b>Export</b> button allows the user to export the results data into an Excel format.
Results Table	The <b>Results Table</b> 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 <b>Member ID</b> 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**

**Member Information**

Name	Date Of Birth	Phone
Status	Age	Email Address
Member ID	Gender	Address
Medicare ID	Marital Status	Emergency Contact
Primary Language	Employment	Emergency Phone

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**

**Current Coverage**

Health Plan	PCP	Benefit Plan Description
Line Of Business	PCP Ethnicity	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>
Benefit Plan	PCP Location	
IPA	PCP Phone	
Effective Date	PCP Fax	
Termination Date	Primary Lab	

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

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

#### IPA/PCP History Section

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



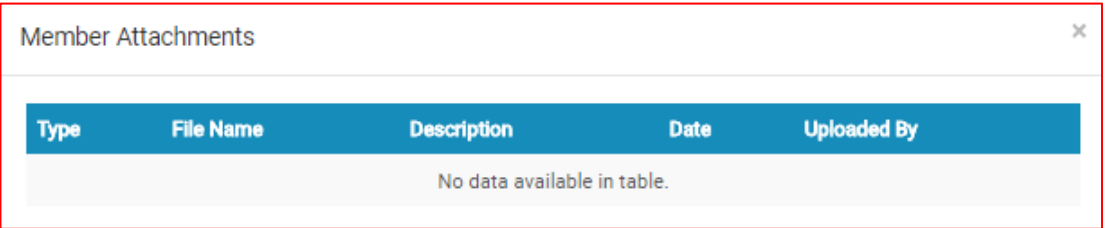
#### Coordination of Benefits Section

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.

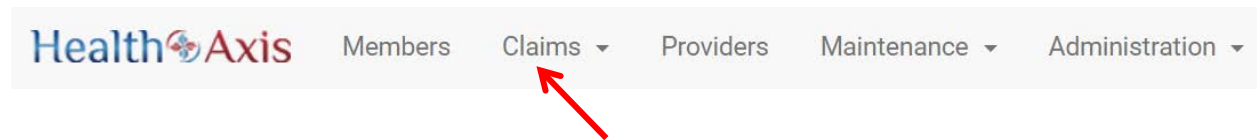
Member Information Screen	
Field Names	Action Buttons – Field Descriptions
	
Claim	<p>The <b>Claim</b> button allows users to view all claims tied to the selected member. Choices are:</p> 
Attachments	<p>The <b>Attachments</b> button allows users to view/download all attachments tied to the selected member. Upon clicking the attachment button, the following popup window will appear.</p> 
HCC/Star	Future enhancement.
Outreach	Future enhancement.
Print	The <b>Print</b> button allows users to print the member information screen.

## Claims Module

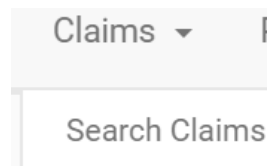
The Claims Module allows users to search claims using specific search criteria.

### 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 <b>Claim Number</b> field allows the user to enter the claim number as part of the search criteria.
Claims Status	The <b>Claims Status</b> dropdown list allows users to select the claim status from the dropdown list as part of the search criteria.
DOS From	The <b>DOS From</b> 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

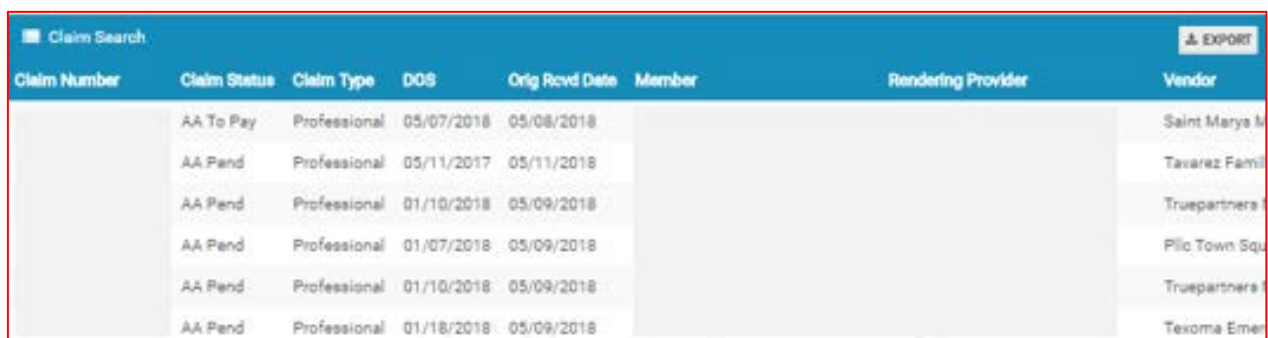


DOS To	The <b>DOS To</b> field allows users to select the date of service to using the calendar feature or by manually keying the date in as follows: MM/DD/YYYY
Member	 The <b>Member</b> field allows the user to enter the member’s name (Last Name, First Name) or click the Find button (shown to the left) to select the member from the Member Search popup window as part of the search criteria.
Rendering Provider	 The <b>Rendering Provider</b> 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 <b>LOB</b> dropdown list allows users to select the LOB as part of the search criteria.
IPA	The <b>IPA</b> dropdown list allows users to select the IPA as part of the search criteria.
Institutional Claim	The <b>Institutional Claim</b> check box allows users to select only institutional claims as part of the search criteria.
Professional Claim	The <b>Professional Claim</b> check box allows users to select only professional claims as part of the search criteria.
Search	The <b>Search</b> 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. <b>Note: Clicking Search with no search criteria will return all results.</b>
Reset	The <b>Reset</b> button allows users to clear all data from the fields prior to saving.

### Claim Screen

#### Field Names

#### Claims Results Section – Field Descriptions



Claim Number	Claim Status	Claim Type	DOS	Orig Rcvd Date	Member	Rendering Provider	Vendor
	AA To Pay	Professional	05/07/2018	05/08/2018			Saint Marys
	AA Pend	Professional	05/11/2017	05/11/2018			Tavarez Famil
	AA Pend	Professional	01/10/2018	05/09/2018			Truepartners
	AA Pend	Professional	01/07/2018	05/09/2018			Plic Town Squ
	AA Pend	Professional	01/10/2018	05/09/2018			Truepartners
	AA Pend	Professional	01/18/2018	05/09/2018			Texoma Emer

Export	The <b>Export</b> button allows the user to export the results data into an excel format.
Results Table	The <b>Results Table</b> 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 <b>Claim Number</b> 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**

Claim - 2017061200045817

Member Information
▼

Salutation	Last Name	First Name	Middle Name	Suffix	Status
	Star	Indian		Jr.	M01 - Active Member
Member ID	CIN Number	Date of Birth	Age	Gender	Marital Status
AH0003	655555555555555576565	01/01/2012	5	Female	Single
Phone	Home Phone	Work Phone	Cell Phone	Fax	Email Address
(546)576-9877	(767)676-7676	(346)433-3356	(566)666-6666	(454)545-4545	
Primary Language	Employment	Emergency Contact	Emergency Phone	Address	
English	Full Time	Star Father	454-545-4545	Hillsborough road, tampa, FL 33626	

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

**Claims Review Screen**

**Current Coverage Section**

**Current Coverage**

<b>Health Plan</b> Access dental plan	<b>Line Of Business</b> Alliedhealth	<b>Benefit Plan</b> AP2017	<b>BP Effective Date</b> 01/01/2017	<b>BP Term Date</b> 12/31/2020
<b>IPA</b> Allied IPA	<b>IPA Effective Date</b> 01/01/2017	<b>IPA Term Date</b> 12/31/2020		
<b>PCP Number</b> P00002076	<b>PCP Name</b> Kumar, Saroj	<b>PCP Effective Date</b> 01/01/2017	<b>PCP Term Date</b> 12/31/2020	<b>PCP Location</b> 657 link road Miami Gardens, FL 33056
<b>Gender</b> Female	<b>Ethnicity</b>	<b>PCP Phone</b> (765) 887-9879	<b>PCP Extension</b>	<b>PCP Fax</b> (678) 989-8989
<b>Benefit Plan Description</b> Benefit Detail Health plan- Access Dental Plan Product- Participating		<b>Primary Lab</b>		

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

## Claims Review Screen

### Claim Header Section

**Claim Header**

Medicare (Medicare #)
  Medicaid (Medicaid #)
  Incare (ID#000#)
  CHAMPVA (Member ID #)
  Group Health Plan (ID #)
  FLCA BLK LINS (ID#)
  Other (ID #)

<b>Claim Number</b> 2017061200045817	<b>Status</b> Paid	<b>Claim Type</b> Professional	<b>Header Level Pend</b>
<b>Encounter</b> No	<b>Batch</b>	<b>Page</b>	<b>External ID</b>
<b>Received Type</b> Paper Claim	<b>First Date Of Service</b> 06/12/2017	<b>Original Received Date</b> 06/12/2017	<b>Total Charges</b> \$50.00
			<b>Received Date</b> 06/12/2017

**Claim Member Information**

Is Patient Insured Person?

<b>Member Number</b> AH0003	<b>First Name</b> Indian	<b>Last Name</b> Star	<b>Middle Initial</b>	<b>Date of Birth</b> 01/01/2012	<b>Gender</b> Female
<b>Address Line #1</b> Hillsborough road	<b>Address Line #2 (Suit/Apt.)</b> Suit 23	<b>City</b> tampa	<b>State</b> FL	<b>Zip Code</b> 33626	<b>Country</b> USA
<b>Province</b>	<b>County</b> Hillsborough	<b>Health Plan</b> Access dental plan	<b>Line of Business</b> Alliedhealth	<b>Product</b> Participating	<b>IPA</b> Allied IPA
<b>Network</b> Allied Network	<b>Group Name</b>	<b>Group ID</b>	<b>Benefit Plan</b> AP2017	<b>Effective From</b> 01/01/2017	<b>Effective To</b> 12/31/2020

**Claim Member PCP Information**

<b>PCP Plan ID</b> P00002076	<b>PCP Name</b> Kumar, Saroj mn M.D.	<b>PCP NPI</b> 04/20/1970	<b>PCP TIN</b> 01/07/1970	<b>Taxonomy</b> 03/04/1970
<b>Address Line #1</b> 657 link road	<b>Address Line #2 (Suit/Apt.)</b>	<b>City</b> Miami Gardens	<b>State</b> FL	<b>Zip Code</b> 33056

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**

**Provider or Facility Information**

<b>Rendering Provider:</b>		<b>Billing Vendor:</b>		<b>Service Facility</b>	
<b>Provider Number</b>	<b>Name</b>	<b>Vendor Number</b>	<b>Pay to Name</b>	<b>Location:</b>	
P00009288	KIM, SHIN	V10000001	SAINT MARYS MEL	<b>Provider Number</b>	<b>Name</b>
<b>Provider NPI</b>	<b>TIN</b>	<b>NPI</b>	<b>TIN</b>	P00009288	KIM, SHIN
1821199068		1538424239	455557052	<b>Provider NPI</b>	<b>TIN</b>
<b>IPA</b>	<b>Specialty</b>	<b>Address 1</b>	<b>City</b>	1821199068	
		FILE 1463	PASADENA	<b>IPA</b>	<b>Specialty</b>
<b>Address 1</b>	<b>City</b>	<b>State</b>	<b>Zip Code</b>	<b>Address 1</b>	<b>City</b>
645 N ARLINGTON	RENO	CA	91199-1463	18653 WEDGE PKV	RENO
<b>State</b>	<b>Zip Code</b>			<b>State</b>	<b>Zip Code</b>
NV	89503			NV	89511

**Referring Provider**

<b>Provider Number</b>	<b>Name</b>	<b>Degree</b>	<b>NPI</b>	<b>TIN</b>

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**

**Claim Line Items**

Status	Svc From	Svc To	CPT	Mod1	Mod2	Mod3	Mod4	POS	ICD Dx	QTY	Freq Type	Billed	Allowed	Adjusted	Print
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													
<b>Total</b>												\$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

**Claim Details**

Is Patient's Condition Related To:

Employment Accident?	Auto Accident?	Dates Patient Unable to work in current occupation	
<input type="text" value="No"/>	<input type="text" value="No"/>	From:	To:
<input type="text" value="No"/>	<input type="text" value="No"/>	<input type="text"/>	<input type="text"/>
Other Accident?	Asg Ben:	Hospitalization dates related to current services	
<input type="text" value="No"/>	<input type="text" value="Yes"/>	From:	To:
<input type="text" value="No"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>
Patient Account Number	Patient Status	Outside Lab?	Lab Charges:
<input type="text"/>	<input type="text"/>	<input type="text" value="No"/>	<input type="text" value="\$0.00"/>
Reserved For NUCC Use	Additional Claim Info+	Resubmission Code	Original Ref No.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Reserved For Local Use	Date of Current Illness, Injury, or Pregnancy (LMP)		
<input type="text"/>	<input type="text"/>		

**Claim Codes 0**

**Dx Codes 3**

ICD 9  ICD 10

<b>DX A</b>	<b>DX B</b>	<b>DX C</b>
<input type="text" value="Z12.31 - Encounter for screeni"/>	<input type="text" value="M85.9 - Disorder of bone dens"/>	<input type="text" value="Z13.820 - Encounter for screen"/>

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

Coordination of Benefits												
Other Health Plan	Other Health Plan	Prior Payment	Balance Due	EST Amount Due	Primary Allowed Amount	Primary Paid Amount	Primary Deductible Amount	Primary Coinsurance Amount	Primary CoPay Amount	Primary Not Covered Amount	Primary With-Hold Amount	Primary Adjusted Amount
Line	Name	Policy/GroupNumber										
No data available in table.												

The **Coordination of Benefits** section allows users to view COB's on the member's claim.

Claims Review Screen

Authorization Information Section

Authorization Information					
Authorization Number	Referral Date	Approved Date	Effective Date	Expiration Date	Authorization Override
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="No"/>

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

Claims Review Screen

Anesthesia Section

Anesthesia				
Anesthesia Time Type	Start Date	Start Time	End Date	End Time
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

### Claims Review Screen

### Ambulance Section

Ambulance

Pick-Up Details			Drop-off Details			
Facility	NPI		Facility	NPI		
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>		
Address Line #1	Address Line #2 (Suit/Apt.)		Address Line #1	Address Line #2 (Suit/Apt.)		
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>		
City	State	Zip Code	City	State	Zip Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Begin Miles	End Miles	Total Miles	Round Trip Description	Transport Reason	Patient Weight(lb)	Stretcher Description
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

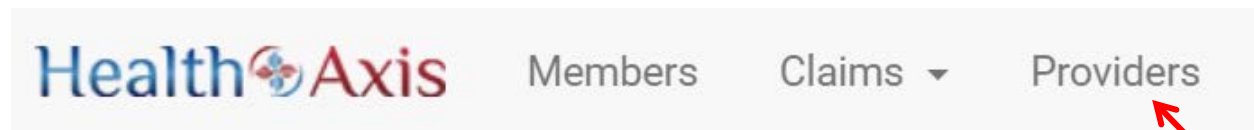
The **Ambulance** section allows users to view ambulance information on the member's claim.

## Providers Module

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

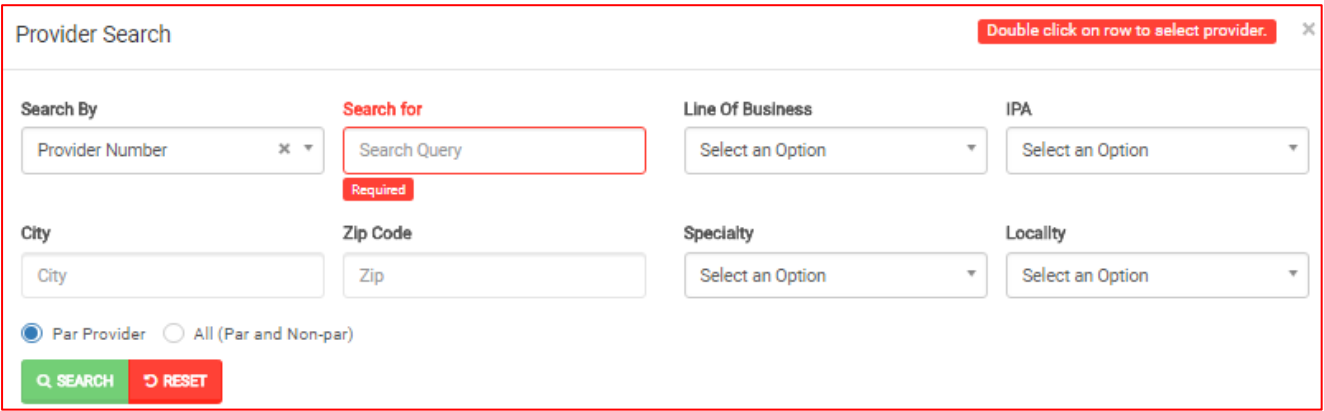
### Accessing the Providers Module

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 <b>Search By</b> 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 <b>Search For</b> fields corresponds to the selection chosen in the <i>Search By</i> field. <b>EX: Smith</b> <b>NOTE: An entry is required in this field, if a selection is made in the “Search By” field.</b>
Line of Business	The <b>Line of Business</b> dropdown list allows users to select a LOB as part of the search criteria.
IPA	The <b>IPA</b> dropdown list allows users to select an IPA as part of the search criteria.
City	The <b>City</b> field allows users to enter the city as part of the search criteria.
Zip Code	The <b>Zip</b> Code field allows users to enter the zip code as part of the search criteria.



Specialty	The <b>Specialty</b> dropdown list allows users to select a specialty as part of the search criteria.
Locality	The <b>Locality</b> dropdown list allows users to select a locality as part of the search criteria.
Par Provider	The <b>Par Provider</b> radio button allows users to select only Par providers as part of the search criteria.
All (Par and Non-par)	The <b>All</b> radio button allows users to select both Par and Non-Par providers as part of the search criteria.
Search	The <b>Search</b> 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. <b>Note: Clicking Search with no search criteria will return all results.</b>
Reset	The <b>Reset</b> button allows users to clear all data from the fields prior to saving.

### Provider Search Screen

#### Field Names Provider Results Section – Field Descriptions

Par	Number	Name	LOB	Network	Specialty	Address
Yes	P00001204	Smith, David	HTAMCR	HTA_PAR	INTERNAL MEDICINE	1200 N. Elm St., Greensboro, NC 27401
Yes	P00001284	Smith, Christopher	HTAMCR	HTA_PAR	CHIROPRACTIC	300 Virginia Rd, Edenton, NC 27932
Yes	P00001580	Smith, Rebecca	HTAMCR	HTA_PAR	PEDIATRIC MEDICINE	1200 N. Elm St., Greensboro, NC 27401
Yes	P00001621	Smith, Steven	HTAMCR	HTA_PAR	CHIROPRACTIC	256 Third Ave. NW, Hickory, NC 28601
Yes	P00001761	Smith, Esther	HTAMCR	HTA_PAR	PEDIATRIC MEDICINE	301 E. Wendover Ave., Greensboro, NC 27401
Yes	P00001899	Smith, Roosevelt	HTAMCR	HTA_PAR	CHIROPRACTIC	4518 W Market St, Greensboro, NC 27407
Yes	P00001912	Smith, Alexis	HTAMCR	HTA_PAR	PULMONARY DISEASE	520 N. Elam Ave., Greensboro, NC 27403
Yes	P00001962	Smith, Tracey	HTAMCR	HTA_PAR	CHIROPRACTIC	1623 York Ave., High Point, NC 27265
Yes	P00002033	Smith, Virginia	HTAMCR	HTA_PAR	MIDWIFE	801 Green Valley Rd., Greensboro, NC 27408
Yes	P00002304	Smith, Leslie	HTAMCR	HTA_PAR	PEDIATRIC MEDICINE	861 Old Winston Rd., Kernersville, NC 27284
Yes	P00002483	Smith, James	HTAMCR	HTA_PAR	CHIROPRACTIC	2113 Glenburnie S Rd, New Bern, NC 28562

Search Results	The <b>Search Results</b> heading tells the users how many records are displayed in the results table.
Export	The <b>Export</b> button allows the user to export the results data into an excel format.
Results Table	The <b>Results Table</b> 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 <b>Previous</b> button allows user to return to the previous page of the search results.
Next	The <b>Next</b> button allows user to skip to the next page of the search results.
Edit Pencil	The <b>Edit (Blue) Pencil</b> 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
PA201804300842123832118	HTAMCR		HTA_PAR				01/01/2016		Active

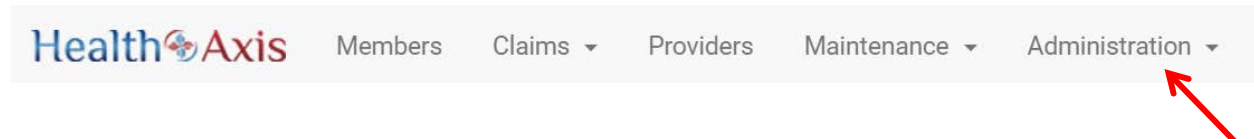
The Provider Assignment section allows users to view the provider assignment plans.

## Administration

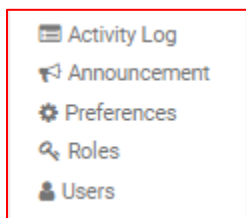
The administration module allows users with administrative privileges to manage user accounts in the Provider Portal. The user will have access to create, terminate or update a user level account details.

### 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 <b>Role Area</b> dropdown list allows users to select the module or section of the provider portal to include as part of the search criteria.
Action	The <b>Action</b> dropdown list allows users to select the type of action to include as part of the search criteria.
User name	The <b>User Name</b> field allows users to enter a username as part of the search criteria.

First Name	The <b>First Name</b> button allows users to enter the user’s first name as part of the search criteria.
Last Name	The <b>Last Name</b> button allows users to enter the user’s last name as part of the search criteria.
From Date	The <b>From Date</b> 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 <b>To Date</b> 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**

User Name	Action Type	Area Name	Message	Log Date	User Status
jortiz	Search	Maintenance ICD Code	ICD Code action search is performed by jortiz with search criteria ICD Type: ICD 10.	05/02/2018 11:33 AM	Active
jortiz	Search	Maintenance ICD Code	ICD Code action search is performed by jortiz with search criteria ICD Type: ICD 10.	05/02/2018 11:33 AM	Active
jortiz	Create	Maintenance Worklist	Worklist Test worklist1 has been create by jortiz.	05/02/2018 11:01 AM	Active
jortiz	Search	Maintenance Worklist	Worklist data has been viewed by jortiz.	05/02/2018 10:59 AM	Active

Search Results	The <b>Search Results</b> heading tells the users how many records are displayed in the results table.
Results Table	The <b>Results Table</b> 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**

<b>Field Names</b>	<b>Announcement Section – Field Descriptions</b>
--------------------	--

Distribution List
MANAGE

**Recipient(s)**

Required

**Announcement Message**

Message

Required

SEND
RESET

Distribution List	The <b>Distribution List</b> dropdown list allows users to select from already created lists to send the announcement message to.
Manage	Selecting the <b>Manage</b> button opens a Manage Distribution List popup window, which allows users to create distribution lists by entering a <b>Name</b> for the list and assigning corresponding <b>Users</b> .

Manage Distribution List
✕

<p><b>Name</b></p> <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Distribution List Name"/> <p style="background-color: #e91e63; color: white; padding: 2px 5px; border-radius: 3px;">Required</p>	<p><b>Users</b></p> <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Select One or More"/> <p style="background-color: #e91e63; color: white; padding: 2px 5px; border-radius: 3px;">Required</p>
---	--

SAVE
RESET

	Name	Users	Last Modified By	Last Modified Date
✕ ✎	Test1	jortiz	jortiz	05/02/2018 11:47:22 AM

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 <b>Recipient(s)</b> field allows users to enter one or more recipient names to send a message. Note: Required field
Announcement Message	The <b>Announcement Message</b> field allows users to enter the details of the message being sent. Note: Required field
Send	The <b>Send</b> button allows users to send the message to the entered recipient(s).
Reset	The <b>Reset</b> button allows users to clear all data from the fields prior to saving.

### Administration Announcement Screen

<b>Field Names</b>	<b>Announcement Results Section – Field Descriptions</b>
--------------------	--

Is Deactivate?	Message	Recipients	Last Modified By	Last Modified Date
<input type="checkbox"/>	test123	jortiz	jortiz	05/02/2018 11:47:53 AM

Is Deactivate?	The <b>Is Deactivate?</b> checkbox allows users to deactivate the message so that it is no longer displayed for the indicated recipients.
Results Table	The <b>Results Table</b> 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

Q Search Role
+ ADD NEW ROLE

Name	Description	Add Date	Add By	Last Modified Date	Last Modified By
Vendor Admin	Vendor administrator default permissions	04/18/2018 8:55:20 AM	Admin, Super	04/18/2018 8:55:20 AM	Admin, Super
Facility Admin	Facility administrator default permissions	04/18/2018 8:54:43 AM	Admin, Super	04/18/2018 8:54:43 AM	Admin, Super
Physician Admin	Physician administrator default permissions	04/18/2018 8:51:59 AM	Admin, Super	04/18/2018 8:51:59 AM	Admin, Super
Admin	Base Admin Account	01/22/2018 3:47:39 PM			

Add New Role	The <b>Add New Role</b> button allows specific users to create new roles. The fields will be described in the following table.
Name	The <b>Name</b> field allows users to narrow down the search criteria by entering a name.
Description	The <b>Description</b> field allows users to narrow down the search criteria by entering a description of the role.
Add Date	The <b>Add Date</b> field allows users to narrow down the search criteria by entering a date.
Add By	The <b>Add By</b> field allows users to narrow down the search criteria by entering a date.
Last Modified Date	The <b>Last Modified Date</b> field allows users to narrow down the search criteria by entering a date.
Last Modified By	The <b>Last Modified By</b> fields allows users to narrow down the search criteria by entering a user name.
Delete Icon	The <b>Delete Icon</b> (red trash can) allows specific users to delete the selected user role.
Edit Icon	The <b>Edit Icon</b> (blue pencil) allows specific users to edit/update the selected user role.

**Administration Roles Screen**

Field Names
Add Roles Section – Field Descriptions

**Create New Role**

**Name**  **Description**

Required Required

**Select Permissions**

Activity Log	READ
Claim	READ EXPORT/PRINT ALL
Member	READ EXPORT/PRINT ALL
Provider	READ EXPORT/PRINT ALL
Role	READ CREATE UPDATE DELETE ALL
User	READ CREATE UPDATE DELETE ALL

**SUBMIT** **RESET**

Name	The <b>Name</b> field allows users to enter a name for the role.
Description	The <b>Description</b> field allows users to enter a description for the role.
Select Permissions	The <b>Select Permission</b> 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 <b>Submit</b> button allows users to submit the changes to the role.
Reset	The <b>Reset</b> 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.

Provider Access Request													
	User Name	First Name	Last Name	Middle Name	Access Level	Email	Phone Number	Extension	User Type	NPI	Tax ID	Company Name	Requested Date
	CenCal	Cencal	Test		Authorization, Claim	cencal@healthaxis.com			Provider	1861722134			05/22/2017 2:49 PM
	admin.test	Test	Test		Authorization, Claim				Provider	1811176480			04/26/2017 3:29 PM

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.

### Create User From Request

Salutation Select an Option	First Name Test	Last Name User	Middle Initial MI	
Date of Birth Select Date	Email jortiz@beaconh.com	Phone Number (813)555-5555	Ext Ext	
Organization Name Testing Provider Portal Request	Role/Title Test Role			
Address 1 5415 Mariner St	Address 2 Ste 215	City Tampa	State Florida	Zip Code 33612
User Type Physician Administrator	NPI 1003006503	Line Of Business HTAMCR		
User Name testingadmin	Role Name Select an Option <small>Required</small>	Password Password	Re-Enter Password Re-Enter Password	
Provider(s) Available	Provider(s) Included P00001001 - Jegede, Olugbemiga			