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Provider Web Portal Quick User Guide

Introduction

The Provider Web Portal from ikaSystems lets you take charge of your interactions with the health plan. The Portal allows providers to perform processes that both minimize their (and the health plans') administrative burden and facilitate participation in more proactive, preventive care plans.

This Provider Web Portal Quick User Guide is designed to let you take advantage of the Portal’s functionality quickly.

Portal Tips

1. A field with a colored background indicates that it is a field that presents a list of choices as you type. Make a selection from the list presented. In the example below, three of the fields are of this type while Authorization No. requires you to type the entry.

   | Authorized Prov. | Authorized Prof. |
   | Authorized No.   | Authorized Prof. |

2. If you have started a search and the system seems to be taking a long time to present the results, check the top right corner of the Portal window. An indicator lets you know what the system is doing currently. In this case it is processing your request so you shouldn’t try to re-enter your search.

Registration

Registration Process Overview

- Register a Provider in the Provider Portal using an NPI or TAX ID. Registration requires the Provider ID number assigned by the ikaSystems. Providers can get their ID number by contacting the health plan.
- Once registered, retrieve the auto-generated email that provides you with a Provider username and password.
- Log into the Provider Portal to add/edit/remove users and check eligibility, view claims and view referrals/authorizations for providers and professionals.

Registering as a Provider

1. Go to the Provider Portal.
2. Below the Login block, click the Here link in New User? Register Here as shown below. The User Registration window appears.
3. Select **Providers** and click **Next**.

4. In the **Select Type** area, choose one of the three types available:
   - Primary Care Physician Office
   - Other Physician Office / Specialist Office
   - Ancillary Provider / Contract Administrator / Payee / Other

   **Note:** You require an ikaSystems ID to register. This number is provided by the health plan and is entered in the **Physician or Provider ID** box.

   i. If you choose **Primary Care Physician Office** or **Other Physician Office / Specialist Office** type an **Individual NPI** or **Tax ID** in the appropriate box and click **Search**.

   **Note:** If you register using an NPI, then only one Professional will be seen in your account. If you register using a TAX ID, then all the providers who share that TAX ID will be seen in your account. Additionally, all the Professionals contracted by the Providers with that TAX ID [Provider Contracts] will be seen in your account.
ii. If you choose Ancillary Provider / Contract Administrator / Payee / Other, type a TAX ID in the TAX ID box and click Search.

Note: If you register using a TAX ID, then all the providers who share that TAX ID will be seen in your account. Additionally, all the Professionals contracted by the Providers with that TAX ID [Provider Contracts] will be seen your account.

5. From the List of available providers displayed in the left pane, select a user and click the ➤ arrow to move your selection to the List of selected providers. If you move the wrong provider accidently, select that provider and click the ◀ arrow to move the wrong provider out of your list.

Tip: To narrow the displayed list of providers, type a Provider ID, Facility Name or name of a provider in last name, first name order and then click Filter.

6. When you have finished adding your selected providers, click Next.

7. On the User Registration window, follow the password requirements listed and provide the requested information. When done, click Finish to complete the registration process.

Using the Portal

Logging In

1. Type your Login ID and Password and then click Login. A forgotten password can be retrieved by clicking Forgot your Password? and then following the onscreen instructions.

Note: The Login ID must be entered in capital letters. For more information about your Login ID and Password, contact the System Administrator your respective health plan.

2. Click I Agree to accept the Terms of Use and complete your login.

Note: Clicking I Disagree automatically logs you out of the portal.

3. After a successful login, a menu bar appears at the top of the window. Select an option from those presented

If you have Portal User rights in the system, you will see this menu:

<table>
<thead>
<tr>
<th>Eligibility</th>
<th>My Members</th>
<th>Referral Search</th>
<th>Claims</th>
<th>Provider Search</th>
<th>Manage User</th>
<th>My Account</th>
<th>Documents</th>
</tr>
</thead>
</table>

If you have Portal Administrator rights in the system, you will see this menu which contains additional items:

<table>
<thead>
<tr>
<th>Eligibility</th>
<th>My Members</th>
<th>Authorization</th>
<th>Claims</th>
<th>Provider Search</th>
<th>Manage User</th>
<th>Reset User</th>
<th>My Account</th>
<th>Reports</th>
<th>Alerts</th>
<th>Documents</th>
</tr>
</thead>
</table>

Options available to you are as follows: (Note: Options available only to Portal Administrators are italicized):

- Eligibility: A Provider can view any Member’s eligibility.
• **My Members:** A Provider can view the eligibility of all of their Members. *(Note: This option is available only for a PCP account since PCE accounts the only ones with assigned members.)*

• **Referral Search:** Providers can search and view all the Referrals created by or referred to them.

• **Authorization:** Providers can search and view all the Referrals / Authorizations created by them or referred to them.

• **Claims:** Providers can view the details their own claims and EOPs.

• **Provider Search:** Providers can search for any Provider or Professional in their network.

• **Manage User:** Providers can manage any Users that were created by them in the **Create User** button. The **Create User** feature is available after clicking Manage User. The **Portal Administrator** user can create any user.

  ▪ **Create User:** Providers can create User Names for Professionals and Staff. This feature is available based on the role of the users.

• **My Account:** If needed, Providers can view their account information and reset their Passwords.

**Checking Member Eligibility**

You can check the eligibility of all members in the network. You can verify the eligibility of a member even if a particular member is not under that Provider.

1. On the menu bar, click **Eligibility.** The **Search Eligibility** window opens.
2. In the appropriate boxes, type *either* the **Subscriber ID / Other ID** or member demographics and then click **Search.**
   
   *(Note: The **Effective Date** defaults to today's date and can be changed prior to clicking Search to see a member's status for other effective dates.)*

3. From the search results presented, click a member to view the eligibility details.
4. To return to the search results screen click the **Back** button. Your previous search results will still be available.

**Checking My Members Eligibility**

You can verify the eligibility of members under the Provider / Professional who logs into the portal. *(Note: This option is available only for a PCP account since PCE accounts the only ones with assigned members.)*

1. On the menu bar, click **My Members.** The **Search Member Eligibility** window opens.
2. In the appropriate boxes, type *at least one* of the search fields requested and click **Search.**
   
   *(Note: The **Effective Date** defaults to today’s date and can be changed prior to clicking Search to see a member’s status for other effective dates.)*
a member’s status for other effective dates.

3. From the search results presented, click a member to view the eligibility details.
4. After a member’s eligibility details are presented onscreen, additional options become available at the bottom of the window. Clicking an option will take you to the appropriate window. Information about these options are described later in this document:
   - Authorization
   - UB Claim
   - HCFA Claim
5. To return to the search results screen click the Back button. Your previous search results will still be available.

**About the Authorization Entry Window**

The Authorization Entry window is used to create a Direct Referral or a Pre-Authorization Request for Treatment.

Patient / Insured Information, Ordering Providers, Authorized Providers, Diagnosis Information, Authorization Services, and Comments sections of the Authorization Entry window are the same for all types of Entries: Direct Referral, Pre-Authorization Request for Treatment for Inpatient, and Outpatient. Physician / Provider Information will be automatically populated based on login.
An example window is shown below.

Creating an Authorization Entry

To create an Authorization Entry, follow these steps to complete all the sections:
1. After selecting a Member from the search window, click Authorization. In the window that opens, complete each section presented as follows.

2. **Authorization Entry:** The **Authorization Entry** area contains a number of automatically populated fields, including Patient / Insured Information.
   **Note:** When only the Insured ID is entered, Patient information is not automatically populated.

   *Insured ID is the ID of the Primary Subscriber.*
3. **Ordering Providers:** This section is divided into two areas: Physician info and Provider info.

<table>
<thead>
<tr>
<th>Ordering Providers</th>
<th>ID</th>
<th>Name</th>
<th>Tax ID</th>
<th>NPI</th>
<th>Taxonomy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physician info</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provider info</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. **Physician info:** This information is automatically populated based on your login. If your login is associated with multiple physicians, the associated physicians are listed in the dropdown menu for Physician ID. Choosing a physician from the menu populates the rest of the information in the ordering provider section.

b. **Provider info:** If the ordering is associated with more than one Provider, then the details are reflected in the drop down menu and choosing the required Provider ID, the system populates the remaining details.

4. **Authorized Providers:** Completing this section is mandatory if the Ordering Provider is not the PCP of the Member OR Service Type = Other and Other (Provider). All fields are automatically populated based on information you type.

<table>
<thead>
<tr>
<th>Authorized Providers</th>
<th>ID</th>
<th>Name</th>
<th>Coverage Pool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physician info</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provider info</td>
<td></td>
<td>OR</td>
<td></td>
</tr>
<tr>
<td>Facility info</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. **Physician info:** Type the ID or physician name in the ID field.

b. **Provider info:** Type the ID or the first few letters of the last name of the Provider. If a physician is associated with more than one Provider, the drop-down menu lists all the associated Providers. Selecting a Provider auto-populates the remaining fields.

c. **Facility Info:** Type the ID or facility name. Select an ID from the list presented to auto-populate the remaining fields.

5. **Diagnosis Information:** Type the diagnosis codes. Codes are automatically suggested as you type a code.

<table>
<thead>
<tr>
<th>Diagnosis Information</th>
<th>Primary Diag.</th>
<th>ICD Version</th>
<th>ICD9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Diag.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ICD9 Proc. Codes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Proc. Codes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. **Primary Diag:** Type the Primary Diagnosis code.

b. **Other Diag:** Type any Other Diag, ICD9 Proc. Code, and Other Proc. codes as needed. These are disease codes identified by the professional / physician.

6. **Authorization Services:** This area lists the services and service dates for services that have been authorized. At the Service line level, Service/CPT Code and the Modifier (Mod) are auto-suggest fields. These are the fields available:

<table>
<thead>
<tr>
<th>Authorization Services</th>
<th>No.</th>
<th>Svc. From</th>
<th>Svc. To</th>
<th>Svc./CPT Code</th>
<th>Mod.</th>
<th>Unit Type</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
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<td>3</td>
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<td>4</td>
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<tr>
<td>5</td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

a. **Svc. From (Service From):** Date when service started.

b. **Svc. To (Service To):** Date to when service has been performed.

c. **Svc./CPT Code (Service Code):** CTP or HCPCS code for authorization.

d. **Mod. (Modifier):** Service code modifier for selected Service Code.

e. **Unit Type:** Code that represents the unit type for the selected service code. For example: Per Visit, Per Minute, Per Day.

f. **Units:** Type the number of units that can be authorized for this Service Code.
7. **Comments:** Type any comments for this Authorization Entry. Click **Add New** to save your comments. You can add additional comments by clicking Add New after every comment. Below the comments block the Comments block displays the number of comments entered and the number of the current comment you are viewing. You can view all the comments for this Authorization in a single window by clicking the magnifying glass in the top right corner of the comments window.

**About the Ordering Professional / Provider on the Authorization Screen**

<table>
<thead>
<tr>
<th>Ordering Providers</th>
<th>ID</th>
<th>Name</th>
<th>Tax ID</th>
<th>NPI</th>
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<td></td>
</tr>
<tr>
<td>Provider info</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Ordering Professionals**

The only Professionals that appear in the **Physician info** menu are those that are in a Provider’s **List of Selected Providers**, found under the **My Account** tab. These Professionals would be seen because they have a contract with the Provider.

**Ordering Providers**

The Ordering Provider is selected based on two different criteria:
- **Provider - Professional Contract screen:** The provider should have a contract with the selected Ordering Professional.
- Provider Groups: The groups associated with the Provider.

**Searching**

You can search for Referrals or Pre-Authorizations.

**Searching for Referrals / Pre-Authorizations**

1. Click the **Search Authorization** button on the menu bar.

2. You can search by any of the available fields. Click **Search** after entering your search criteria.
3. Sort the displayed results by clicking a column heading. **Tip:** You can search for all Referral/Authorizations by clicking Search without any search criteria.
4. To view an Authorization from the search list, click the relevant Authorization and scroll to the bottom of the page to see the **Decision Information**.

**Searching For, Viewing, and Printing Claims**

1. From the menu bar, click **Claims**.
2. Type the search criteria to locate a member and click **Search**.
3. From the list presented, check the **Status/EOP** column for the status of a claim. You can only view claims that have the status **Processed**.
4. To view the claim, click the applicable **Processed** link. An **Explanation of Payment** appears.
5. To print the claim, right-click anywhere in the Explanation of Payment and select **Print** from the menu presented.
About Users and User Roles

Depending on what has been assigned to you, you may have more or less visibility into the system than other users.

Hierarchy of the Provider Portal Roles

To understand how the Portal roles work, look at the diagram below. At the top level the Portal Administrator has complete access to the system. The roles that follow show, in descending order, the amount of access users have to the system and if they can create users below them in the hierarchy.

Managing Users

A User can search for any users they have created and any users below them in the hierarchy.

1. From the menu bar, click Manage User. The Manage Users window opens.
2. Type the search criteria and click Search.
3. From the results that appear, click a Username. The View / Edit User Details window opens.
4. You can make any needed edits including resetting the password for the user or forcing the user to reset their password when they next log in.
   Note: Users are notified by email if there is a password change.

Creating Users

You can create a new user from within the Manage Users window.

1. From the menu bar, click Manage User. The Manage Users window opens.
2. Click Create User. The User Registration window opens.
3. Complete the information required. You can only create users up to the Maximum limit shown at the top of the window.
4. Selecting Create Privilege allows you to enable the User you are registering to also create users up to the User Limit you specify.
5. Choose a role for this user from the list presented.
6. You can assign Providers from the **List of Available Providers** to the Provider you are registering. The Provider you are registering can see all Claims, Members, and other relevant information of the Providers you add to the **List of selected providers**.

7. Set the **Password Option**. **Auto** provides a password created by the system and is emailed to the user. **Manual** allows you to create a password for the user as you create the new User account. You can also use this function to reset a User password.

8. Click **Create** to complete the User registration process.

**Resetting a User**

A Portal Administrator has the ability to reset a User password for all users. If you are not an Administrator you can only reset a User password for the users you have created. See the **Creating Users** section above for instructions on how to change a User you manage.

1. From the menu bar, click **Manage User**. The Reset User Password window opens.
2. Type the Login ID for the User who needs their password reset.
3. Make a selection for the Password Option. **Auto** provides a password created by the system and is emailed to the user. **Manual** allows you to create a password for the user.
4. Click **Reset** to save the password change.

**My Account**

The My Account option lets you change details about your account, change your password, and change the security question presented when you are challenged by the system to confirm your password.

1. From the menu bar, click **My Account**.
2. Select any of the tabs where you need to make a change and follow the onscreen instructions.
3. Click **Update** to save any changes.