Gold Coast Health Plan℠
A Public Entity

Enterprise Transformation Project

i-Transact Provider Portal User Guide

2021

i-Transact Provider Portal User Guide

Purpose:
The purpose of this document is to provide information on how to register for the new i-Transact Provider Portal (Portal) for the first time. It includes step-by-step instructions for creating a user account and information on how to navigate the functions of the new Portal.

Background Information:
On May 3, 2021, Gold Coast Health Plan (GCHP) will implement a new provider portal system to better serve our providers. The new portal is called i-Transact. This new Portal will offer providers immediate access to member eligibility information, the ability to enter authorization requests, pull membership lists for PCP providers, along with new features such as the ability to submit claims and attach documents to authorization requests and claims.

Definitions:
Access Code: A unique, one-time use, number that is assigned to an entity which grants access to the Superuser to create a Portal account for the first time.

Office / Provider / Vendor Number: A unique number assigned to each entity, that will vary based on location. This number will distinguish the type of account you will create, which each vary in function.

Primary Web Account: A portal role that functions as the Superuser / Administrator who can create and manage additional staff accounts.

Superuser: An identified person that has been designated the access to create an initial Portal account for your office or entity. Superusers can create and manage accounts.

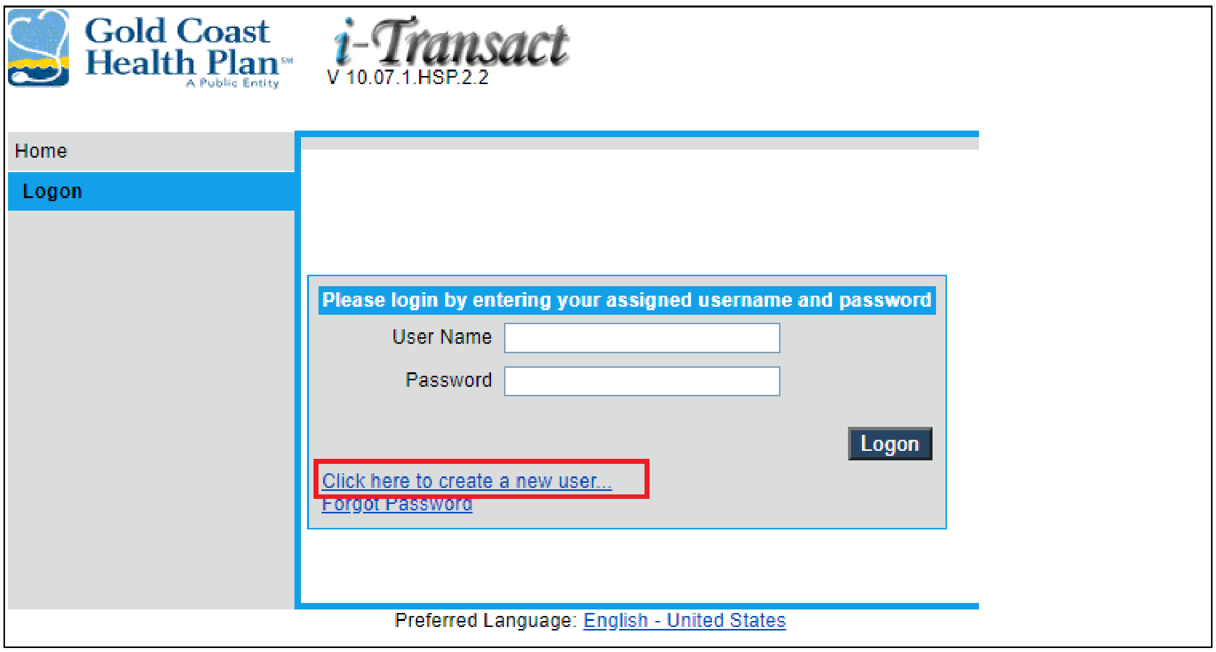
Web Role: A portal role that functions as a child account, does not have ability to create or manage accounts. This role still has ability to perform all other Portal activities within their account type. Depending on account type you may see WebProvider, WebOffice or WebVendor.

Accessing the Portal:
For initial Portal access, users will need to visit the website for i-Transact and create a profile. Access to the Portal is restricted to authorized users only.

GCHP has identified initial Portal access to "Superusers." Only superusers will be provided with their entity's unique Number and Access Code, a set of information required for initial account set-up. Superusers must obtain this information by contacting GCHP's Customer Service Department at 1-888-301-1228.

Superusers will have the ability to create and manage accounts within the Portal and may also designate an Administrative user with role permissions to create and manage accounts for their office.

How to create an account:
On the i-Transact Portal login screen, the Superuser or Administrative user will click on the “Click here to create a new user” link. This will move the user to the “Create an Account” screen.

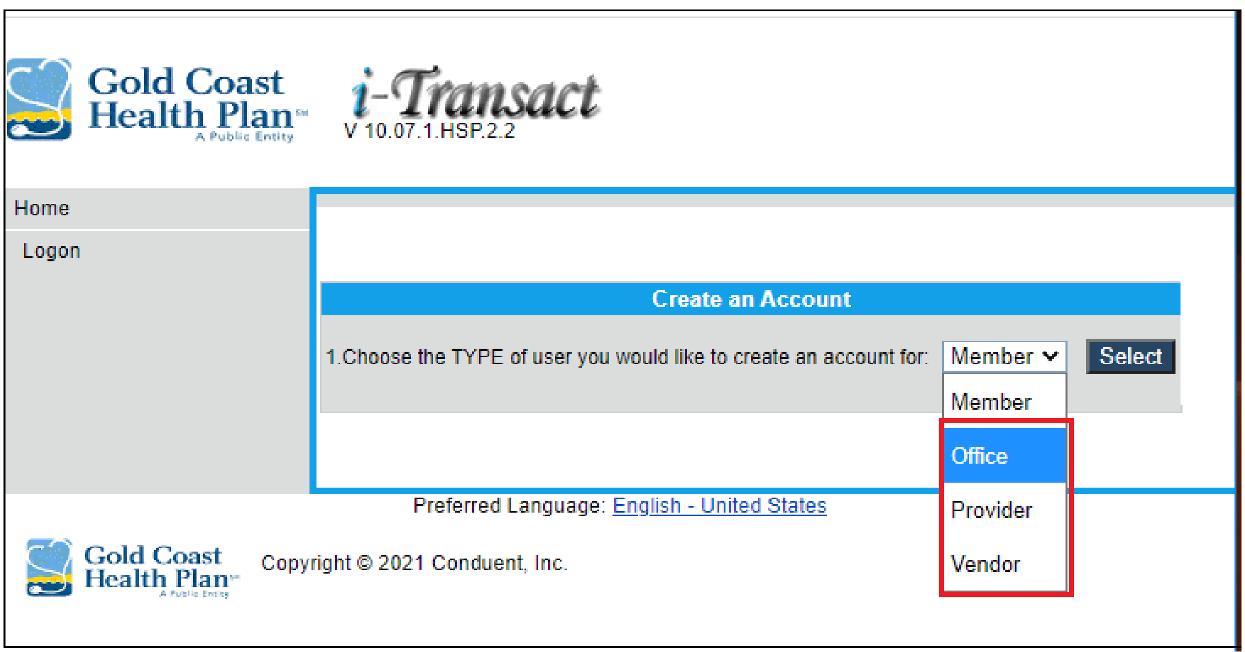


On the “Create an Account” screen, the user will have to choose the type of account they would like to create.

Vendor registration (GCHP recommended):
The Vendor account allows the user to submit claims on behalf of the vendor (entity). The function of submitting an authorization differs from the Office and Provider account type, with still having ability to check member eligibility, check claim status, and print remittance advice. For entities with multiple offices, a separate account is required for each office.

Office registration:
For offices with multiple practitioners, the user can submit authorizations and claims on behalf of each of the practitioners at that office and distinguish who is the ordering practitioner on the submission. For entities with multiple offices, a separate account is required for each office.

Provider registration:
For Facility or Ancillary providers and solo practitioner-practices, the “Provider” user account type is recommended. The user can submit authorizations and claims for their entity. For entities with multiple offices, a separate account is required for each office.



The login credentials vary for each user account type. Each entity will have their unique fields and Access Code that will need to be filled out to complete the set-up process.

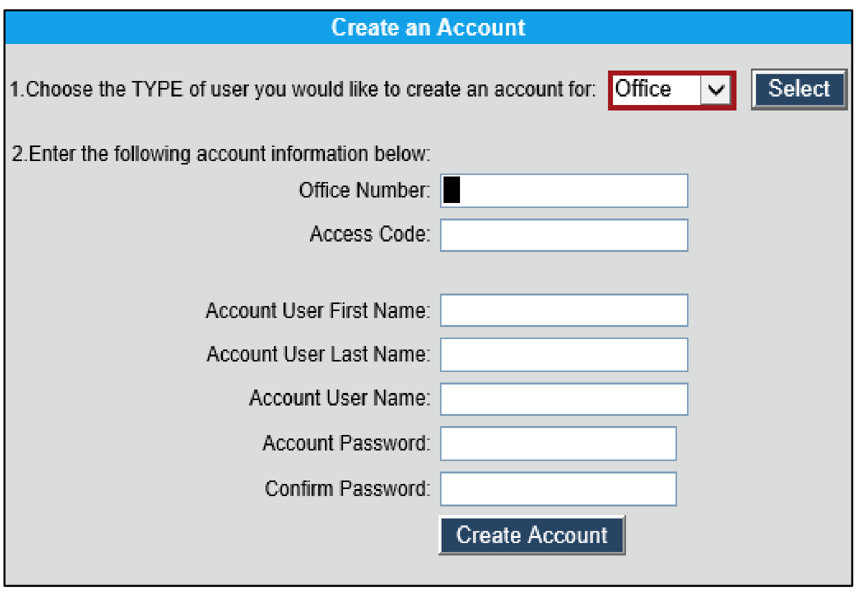
Account Username:

- Cannot be duplicated
- Has no upper / lowercase letter or character requirements

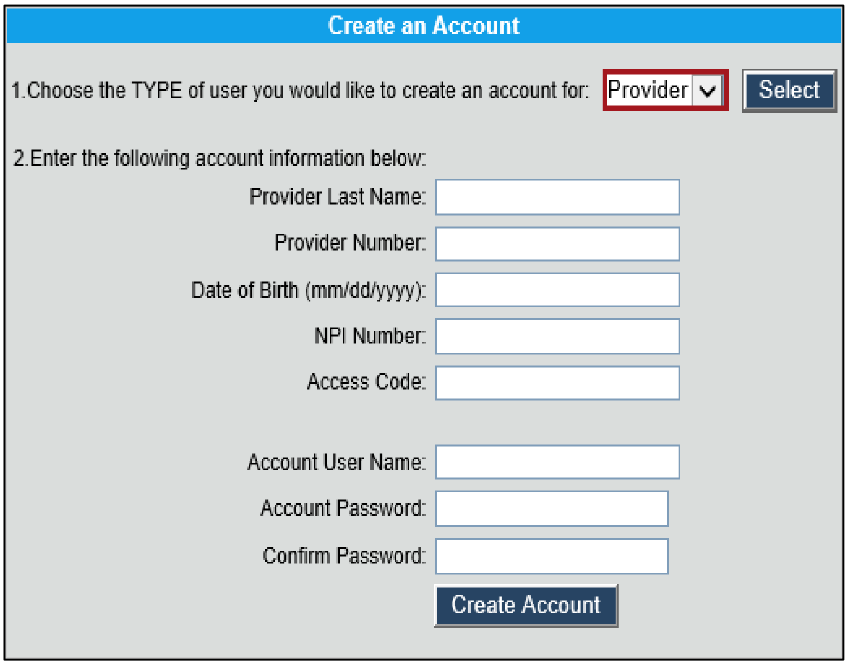
Password:

- Minimum of 10 characters
- 1 Uppercase letter
- 1 Lowercase letter
- 1 Special character (e.g., @!#$)
- Minimum of 1-digit number

The example below reflects an **Office's** login criteria:



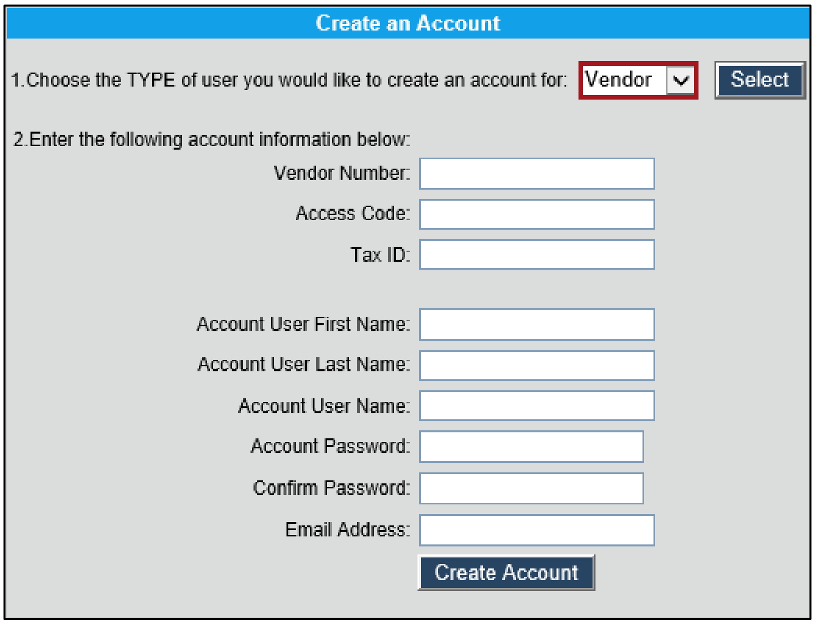
The example below reflects a **Provider's** login criteria:



Provider Last Name: The name must match exactly as it is listed for GCHP (including spelling, hyphens and abbreviations).

Date of Birth: Can be any set of random numbers for a Facility or Ancillary provider.

The example below reflects a **Vendor's** login criteria:


Create an Account

1.Choose the TYPE of user you would like to create an account for: Vendor Select

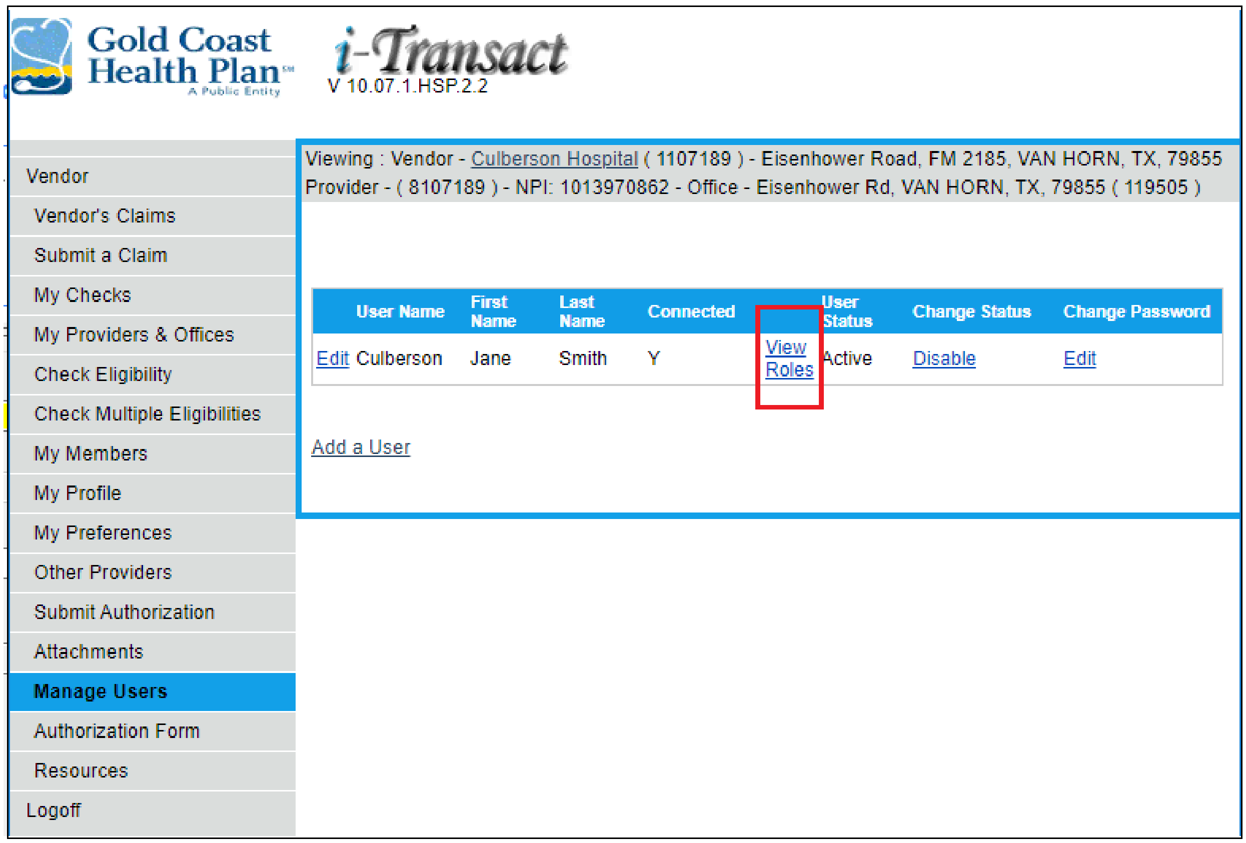
2.Enter the following account information below:

Vendor Number:
Access Code:
Tax ID:

Account User First Name:
Account User Last Name:
Account User Name:
Account Password:
Confirm Password:
Email Address:

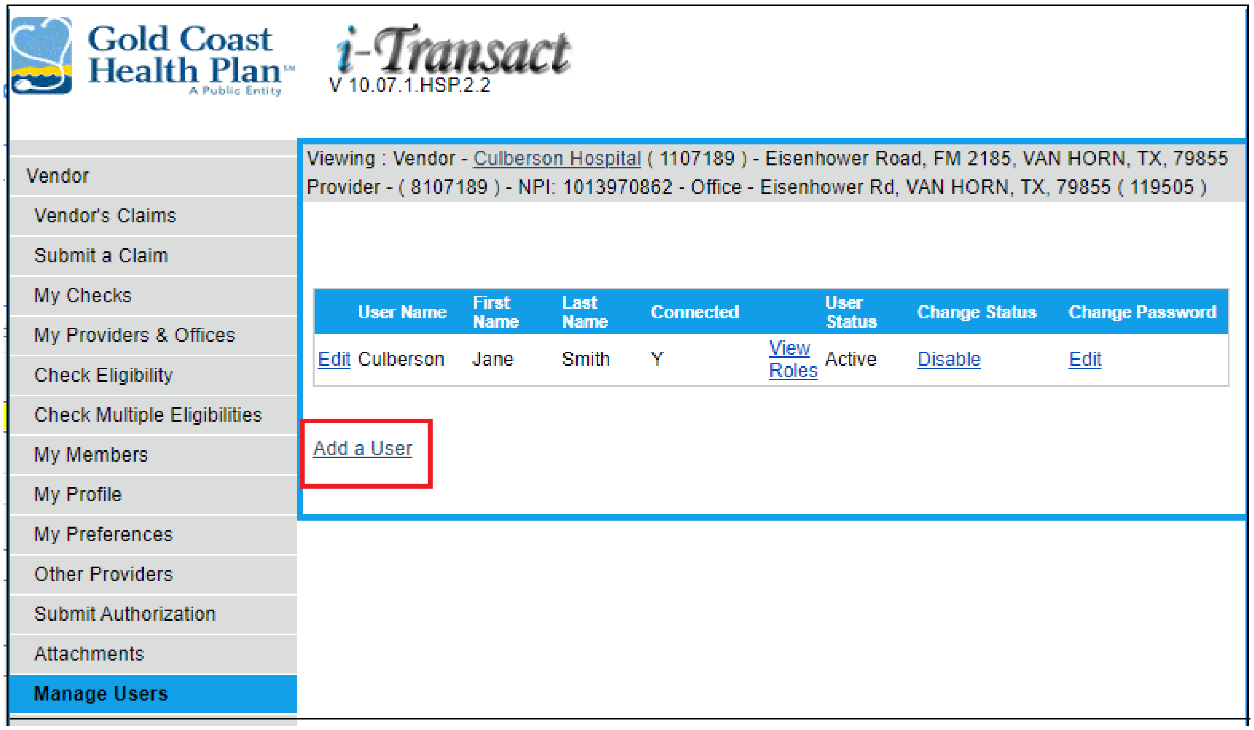
Create Account

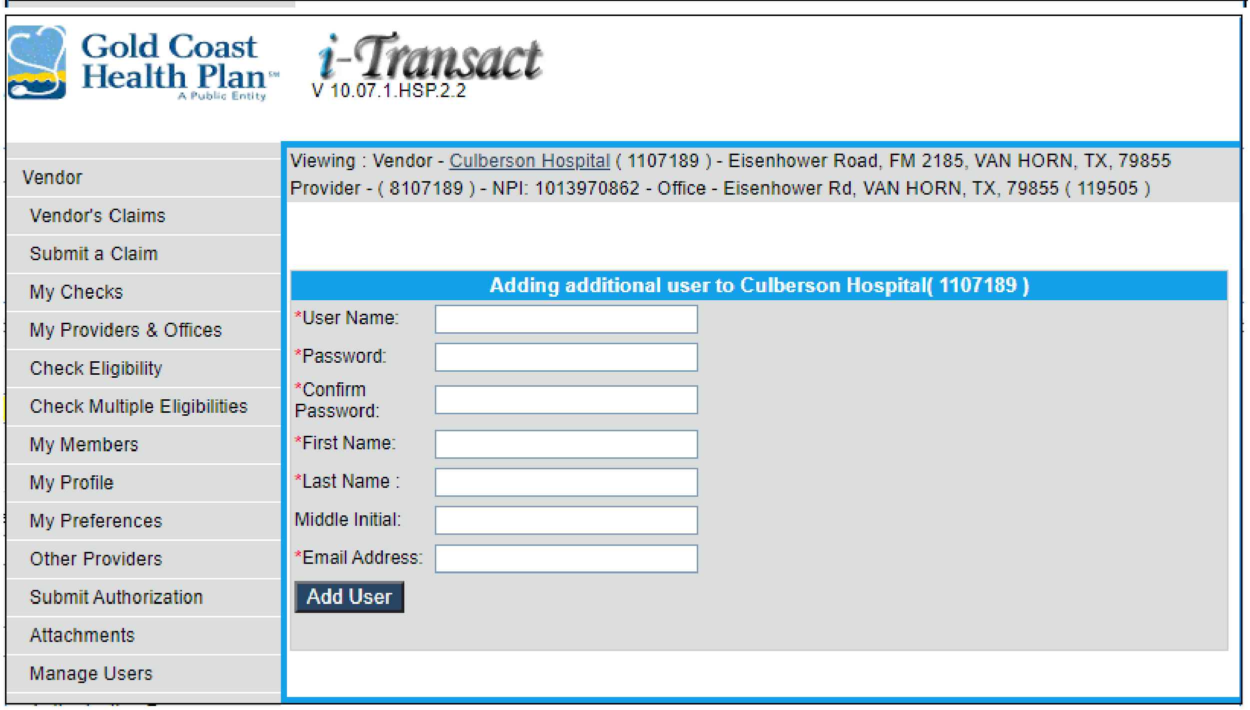
Once the Superuser or Administrative user is successfully logged in, their role as **Primary Web Account** will be selected. This is reflected in the “Manage Users” tab by clicking on **View Roles**.



Superusers or Administrative users will be responsible for adding new users, setting roles, managing all added accounts, as well as resetting passwords and disabling accounts that are no longer active.

To create a new staff account, click “**Add a User”** in the “Manage Users” tab.





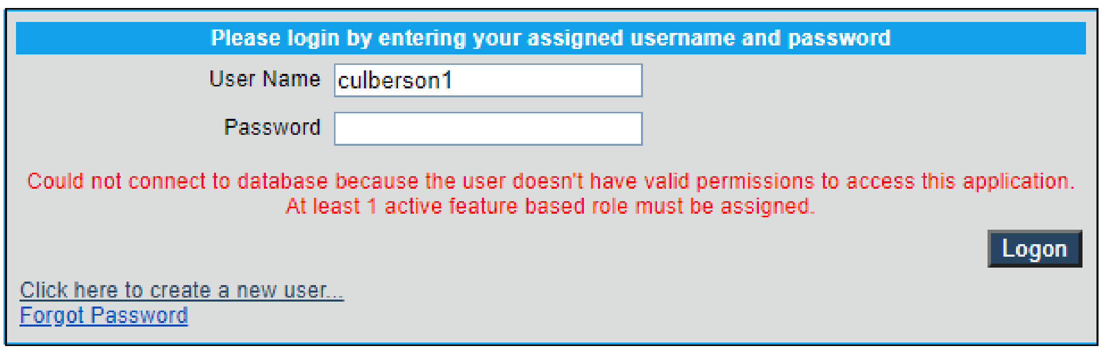
The Superuser or Administrator user will complete all required fields in the “Add User” screen.

They will then provide the newly created username and password to their staff member. Upon the staff member's initial log-in to the Portal, they will be prompted to create their own password. The username is specific to individual users and should not be shared with anyone. The username cannot be duplicated, and the initial password only works as a temporary password.

For users that need access for multiple office locations, a separate user account is required for each location.

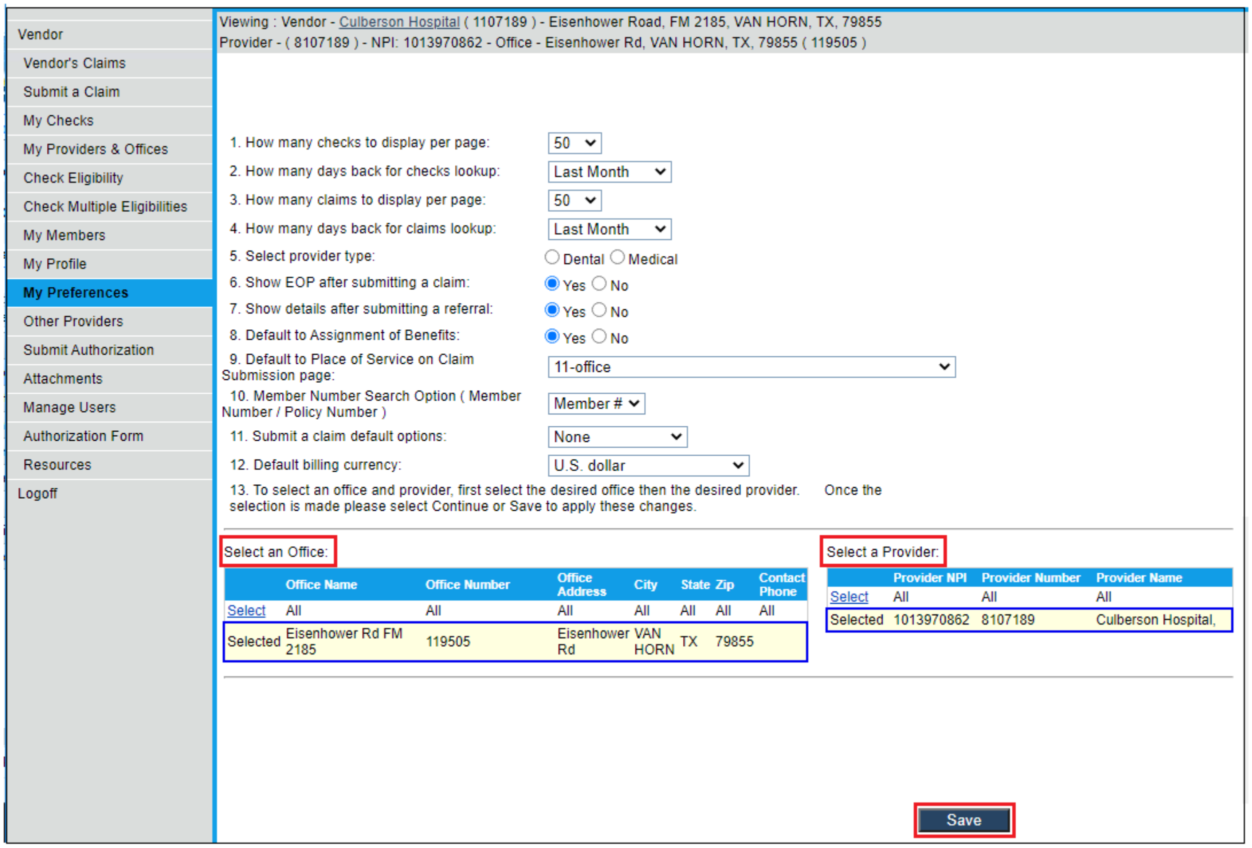
Please note: A Role must be selected for the newly created staff account.

If no role is selected for a new account, the user will receive the following error message:

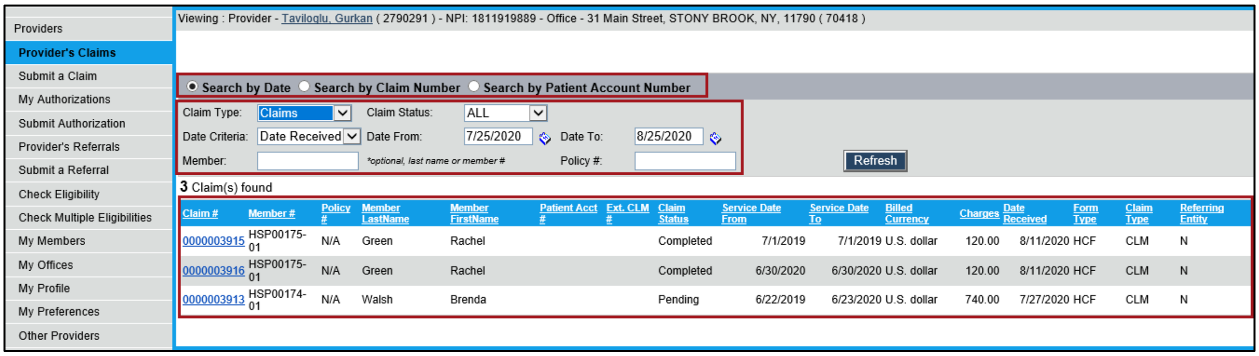


Navigating the Portal:
Upon initial login, all users will land on the "My Preferences" tab. This is a required step before moving on to the remainder of the portal functions. You must click "Save" to save your preferences and proceed. Preferences can be changed at any time thereafter.

My Preferences



Provider's (Vendor's) Claims

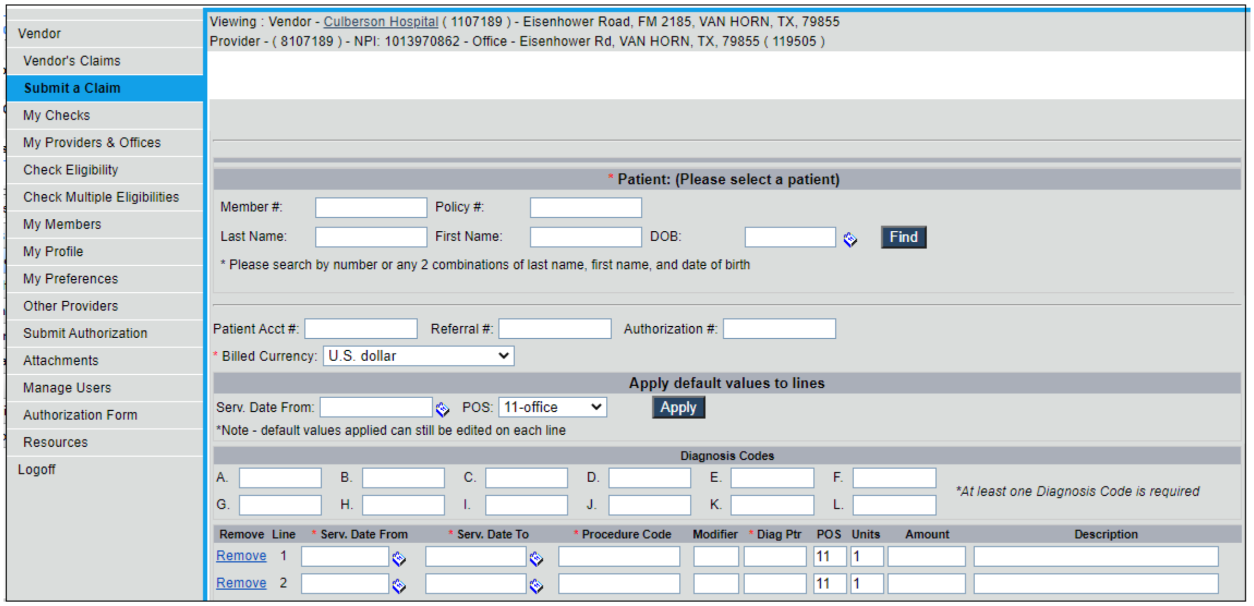


The Provider's (Vendor's) Claims tab allows you to view claims submitted by the Provider for the currently selected office. To view other claims or search for a specific claim, use the fields at the top of the screen. The user can search by any combination of criteria.

To search for a claim:

- Search by Date: Claim Type, Claim Status, Date Criteria (Date of Service or Date Received), or Member's last name
- Search by Claim Number
- Search by Patient Account Number

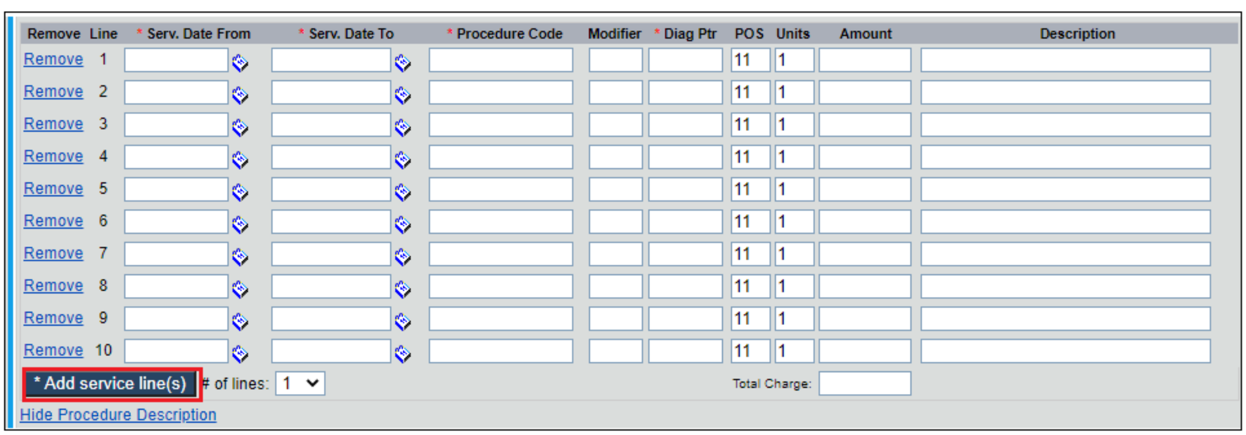
Submit a Claim



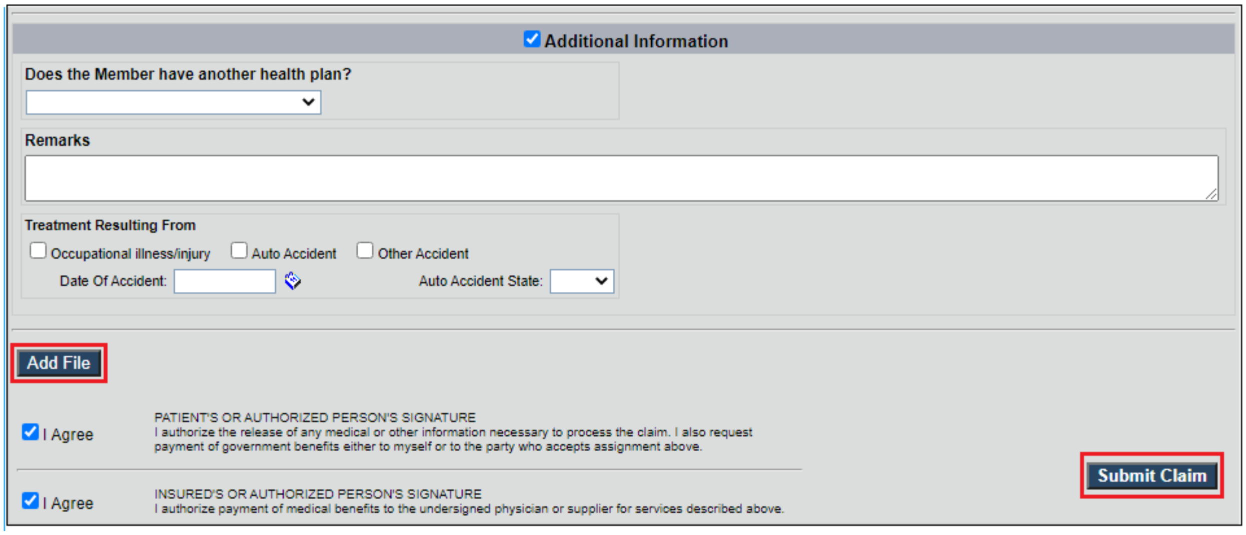
The “Submit a Claim” tab allows a provider to submit a claim and attach documents (e.g., clinical notes) to the claim.

At this time, only Professional Claims (HCFA) are being accepted through the Portal. UBs must continue to be submitted via paper claims or electronically through EDI Direct.

Additional lines can be added or removed by clicking the “Remove” function or the “Add service line(s)” option.



Modifiers: Multiple modifiers can be populated but must be separated with a coma.



Additional Information

Does the Member have another health plan?

Remarks

Treatment Resulting From

Occupational illness/injury Auto Accident Other Accident

Date Of Accident: Auto Accident State:

Add File

I Agree

PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE
I authorize the release of any medical or other information necessary to process the claim. I also request payment of government benefits either to myself or to the party who accepts assignment above.

I Agree

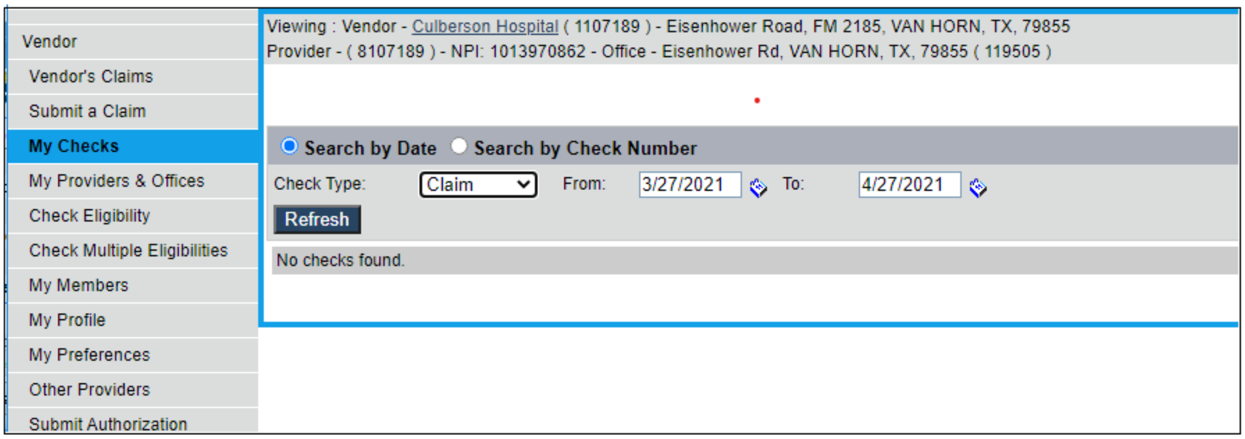
INSURED'S OR AUTHORIZED PERSON'S SIGNATURE
I authorize payment of medical benefits to the undersigned physician or supplier for services described above.

Submit Claim

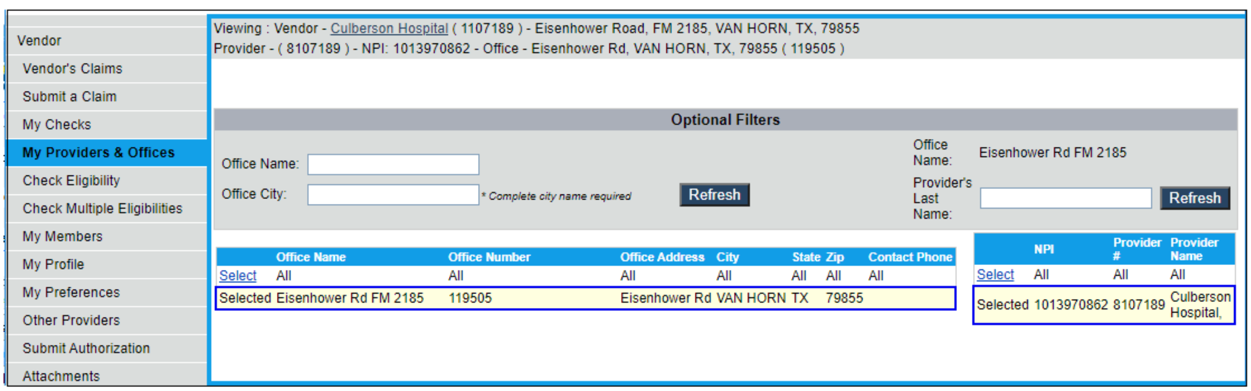
Clicking “Add File” allows you to attach documents to the claim. Any type of image is acceptable.

Select “**Submit Claim”** to complete the process.

My Checks

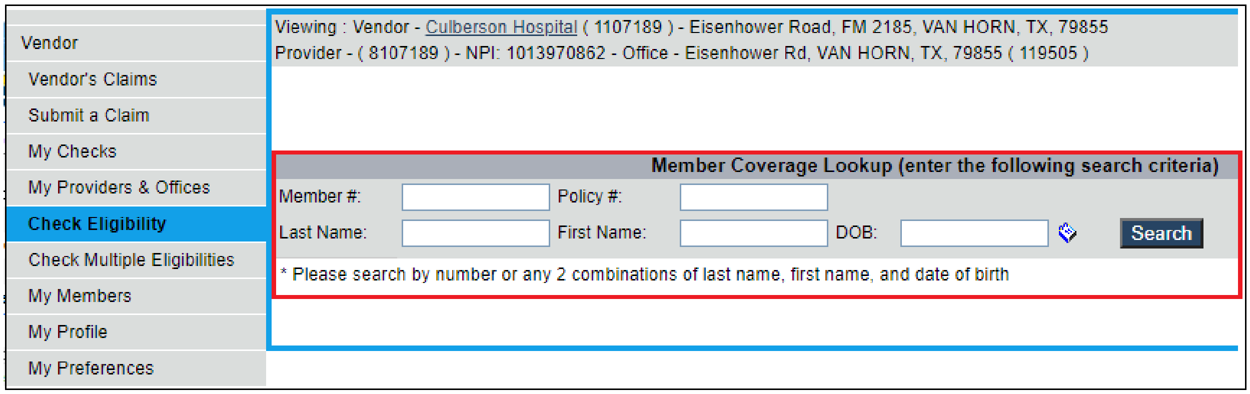


My Providers & Offices



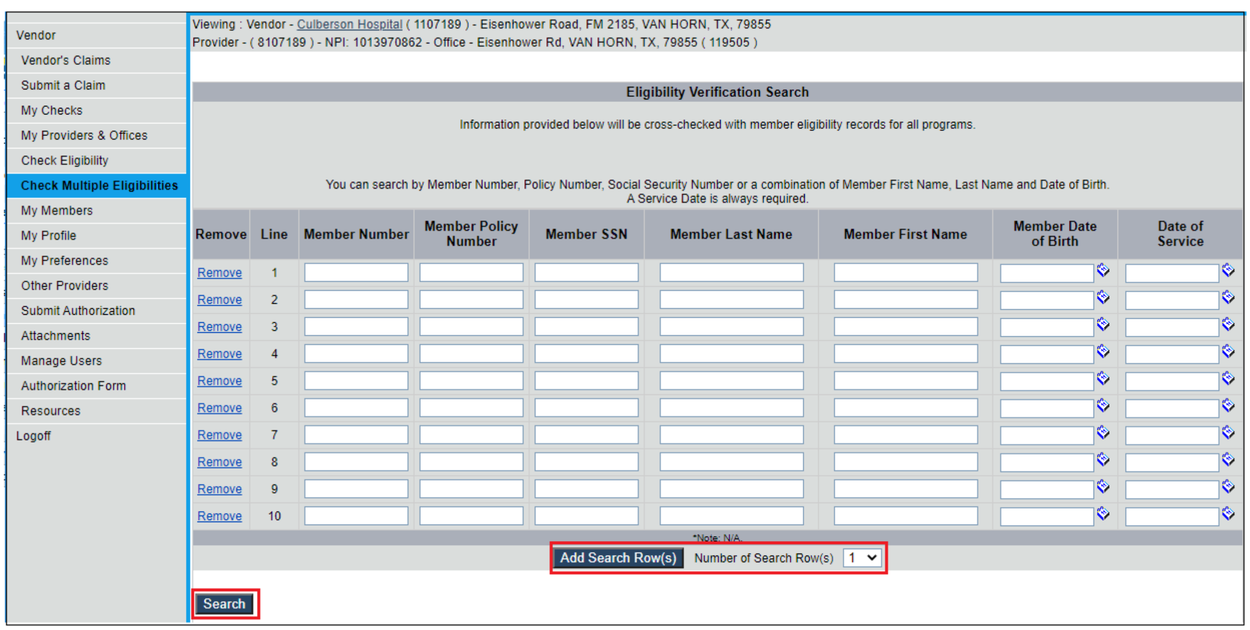
Check Eligibility

The "Check Eligibility" tab allows the provider to verify that a (single) member is currently enrolled. Please search by first and last name, or any combination of member number, policy number, or date of birth.



Check Multiple Eligibilities

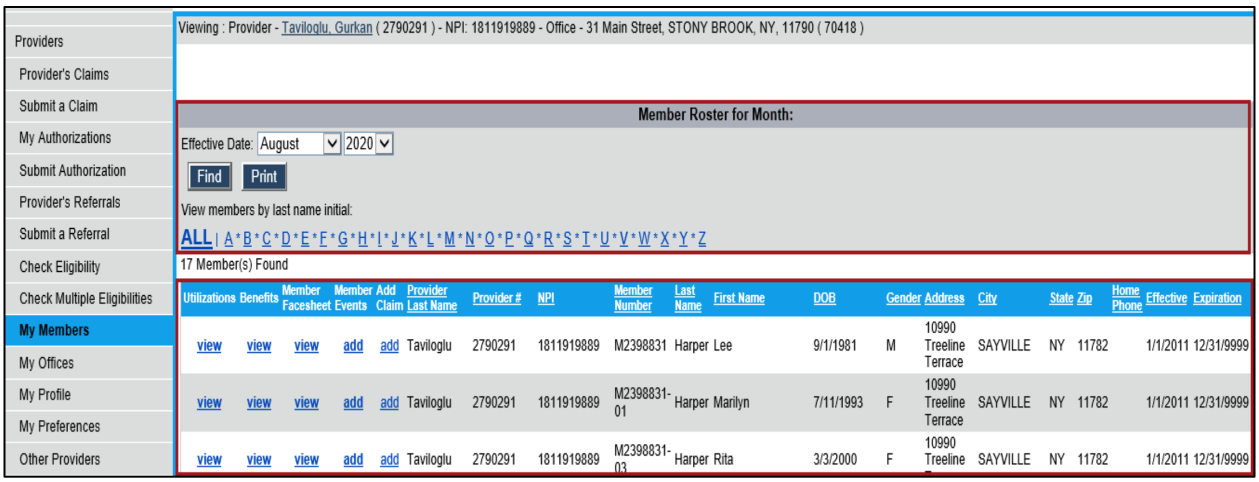
The "Check Multiple Eligibilities" tab allows the user to verify eligibility status for up to 10 members at once, with the option to add additional search rows. The minimum requirements to check multiple eligibilities is the member number and date of service or any combination of member last name, first name, and date of birth along with the date of service.



My Members

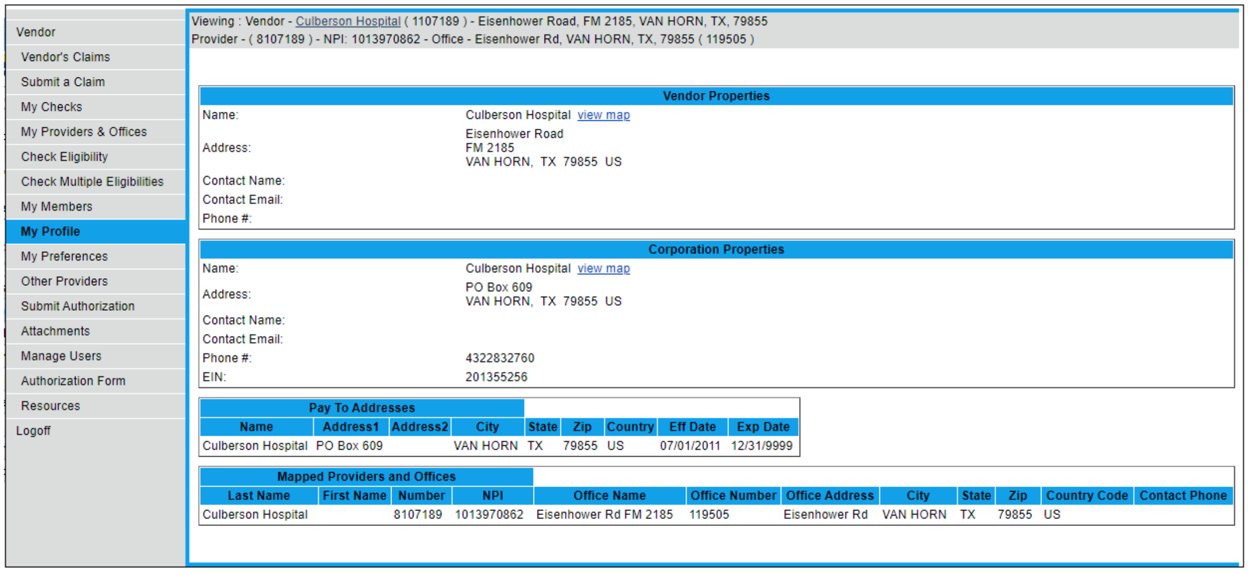
The “My Members” tab allows the user to view all the members assigned to the Primary Care Clinic for a specific month. The provider can also access and utilize the functions listed below:

- View Utilization Benefits (members utilization of liabilities)
- View Benefits (Summary of Benefits)
- View Member Facesheet (member’s medical history)
- Add a Claim



My Profile

The “My Profile” tab allows the user to view their information as it exists in the GCHP system, including Personal Information, Identification Numbers, Office Addresses, Contact Information, Office Hours, and Languages.


Vendor
Vendor's Claims
Submit a Claim
My Checks
My Providers & Offices
Check Eligibility
Check Multiple Eligibilities
My Members
My Profile
My Preferences
Other Providers
Submit Authorization
Attachments
Manage Users
Authorization Form
Resources
Logoff

Viewing : Vendor - Culberson Hospital (1107189) - Eisenhower Road, FM 2185, VAN HORN, TX, 79855
Provider - (8107189) - NPI: 1013970862 - Office - Eisenhower Rd, VAN HORN, TX, 79855 (119505)

Vendor Properties	
Name:	Culberson Hospital view map
Address:	Eisenhower Road FM 2185 VAN HORN, TX 79855 US
Contact Name:	
Contact Email:	
Phone #:	

Corporation Properties	
Name:	Culberson Hospital view map
Address:	PO Box 609 VAN HORN, TX 79855 US
Contact Name:	
Contact Email:	
Phone #:	4322832760
EIN:	201355256

Pay To Addresses

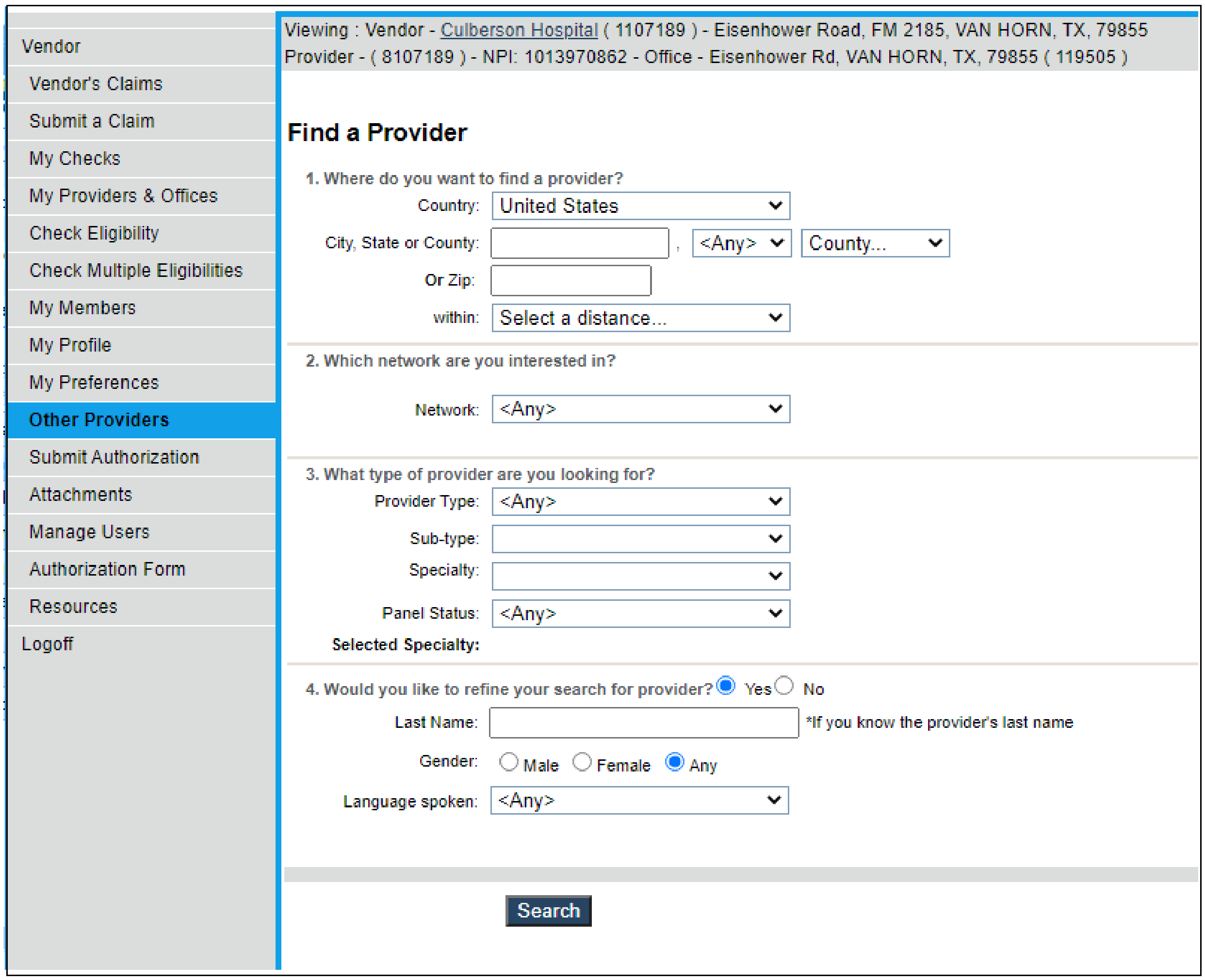
Name	Address1	Address2	City	State	Zip	Country	Eff Date	Exp Date
Culberson Hospital	PO Box 609		VAN HORN	TX	79855	US	07/01/2011	12/31/9999

Mapped Providers and Offices

Last Name	First Name	Number	NPI	Office Name	Office Number	Office Address	City	State	Zip	Country Code	Contact Phone
Culberson Hospital		8107189	1013970862	Eisenhower Rd FM 2185	119505	Eisenhower Rd	VAN HORN	TX	79855	US	

Other Providers

The “Other Providers” tab will open a search form through which the user is able to search for other providers in the system.



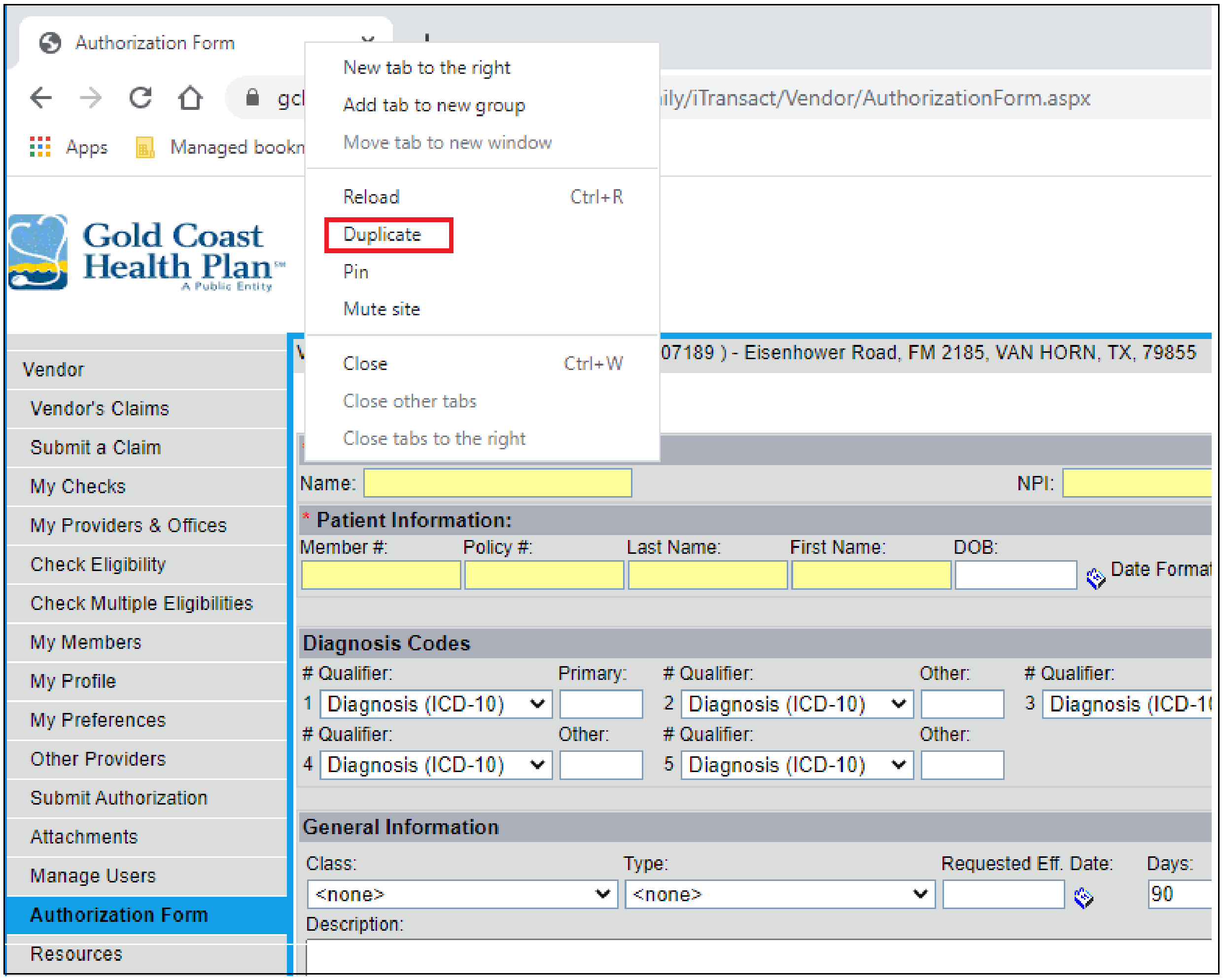
Authorization Form
To submit an authorization, start at the "Authorization Form" tab. This is considered the first step of the authorization submission process.

- At this time, only outpatient authorization requests are being accepted in the Portal.
- Inpatient authorization requests must continue to be submitted via fax.

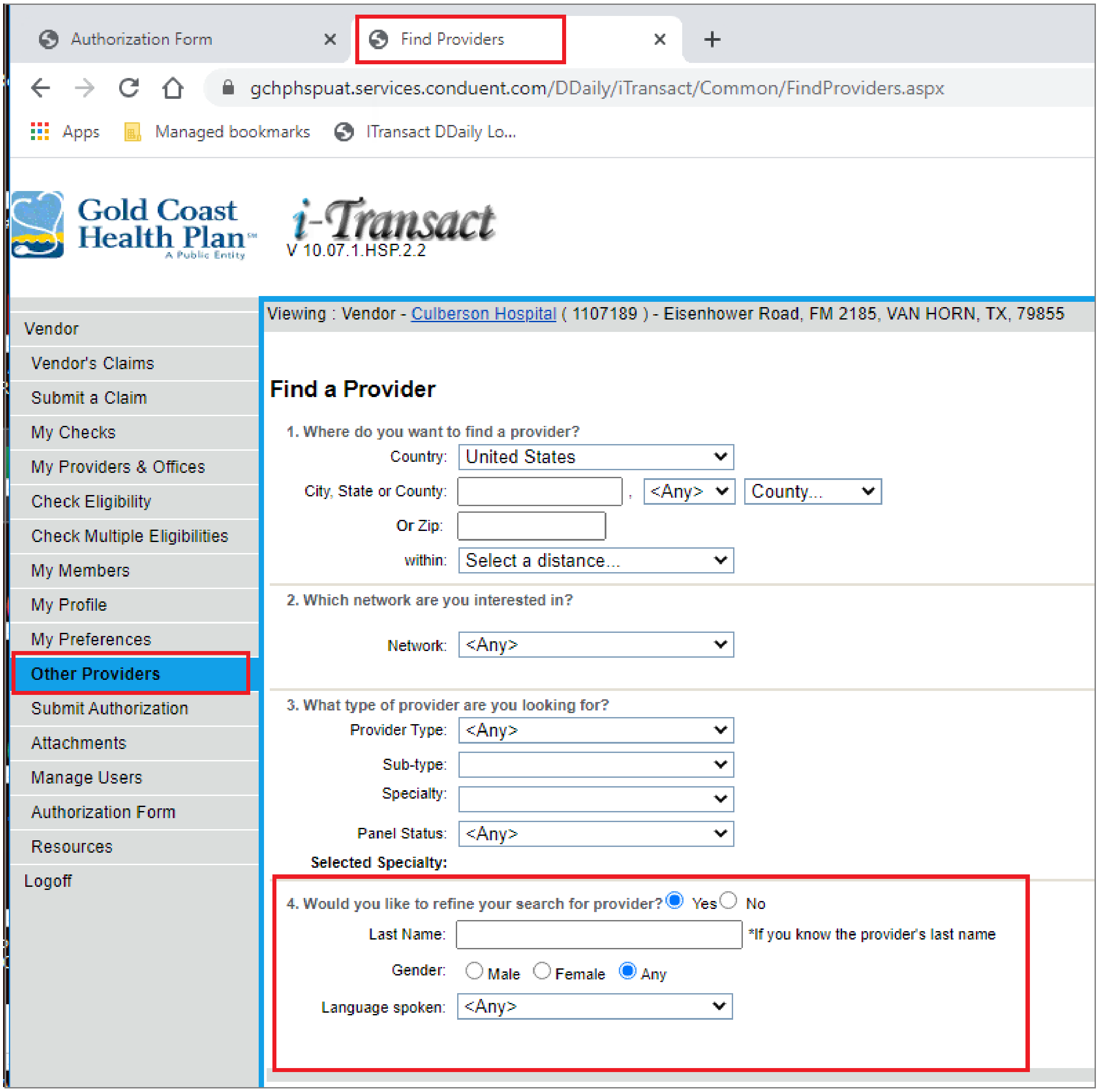
In the "Authorization Form" tab, you will be required to complete all applicable fields. Please note that these fields are free text and are not linked to the system. It is vital that the information entered manually is accurate to avoid delays in processing.

When entering a Facility or Servicing provider, an NPI is required. To assist you in locating the correct NPI, you will need to open a second tab on your web browser, which will allow you to have two sessions open to search for an NPI in the "Other Providers" tab.

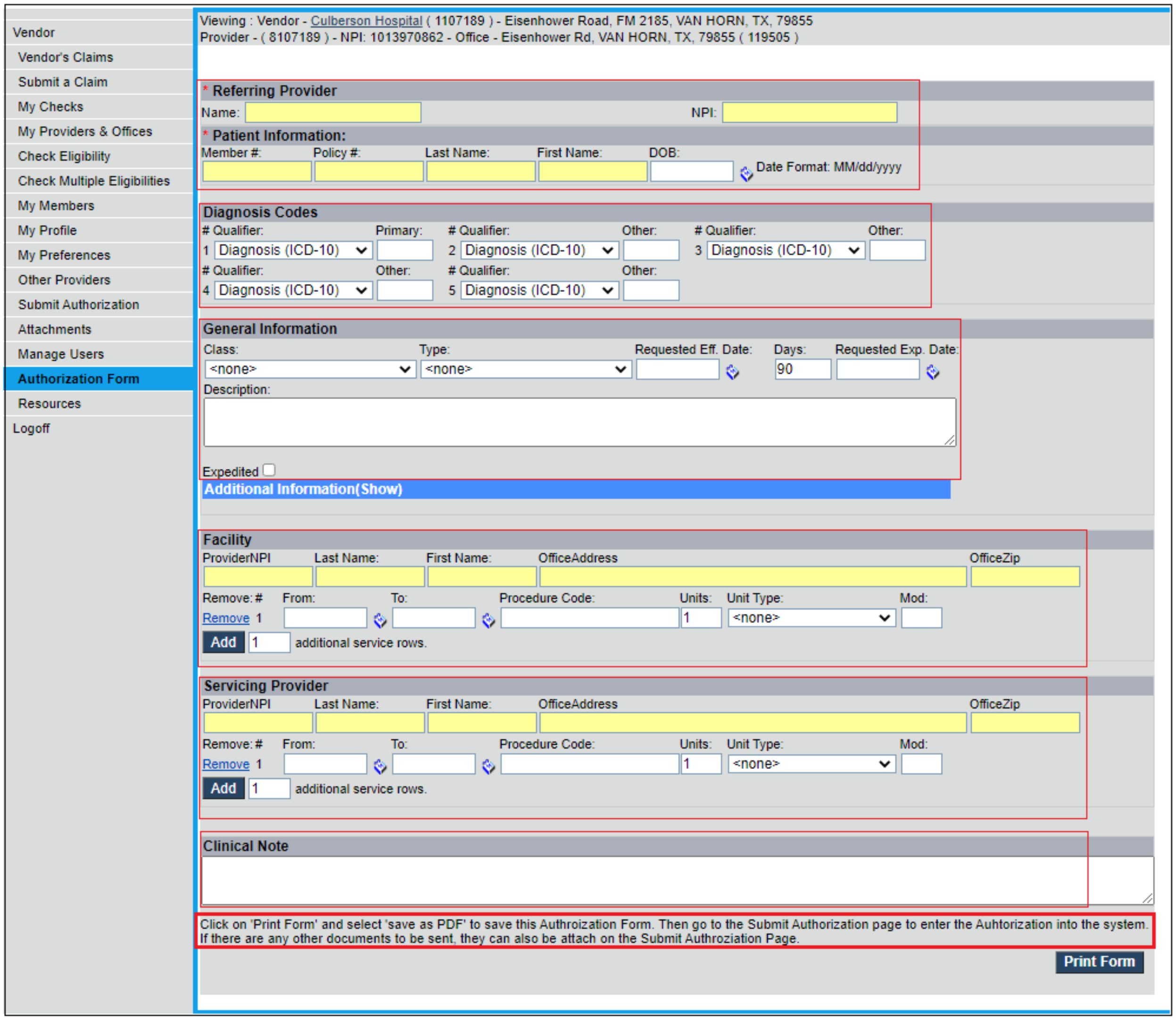
Right click on your portal session tab, then select Duplicate.



This will open a second tab where you will navigate to the **Other Provider's** tab. In Section 4, enter the name of the Facility or the Provider's last name. From the search results, you may select the appropriate facility / provider to obtain their NPI.



The NPI must then be entered into the Authorization Form in your first portal session tab. If you are certain no additional authorization submissions will be submitted, you may close the tab with the second portal session.

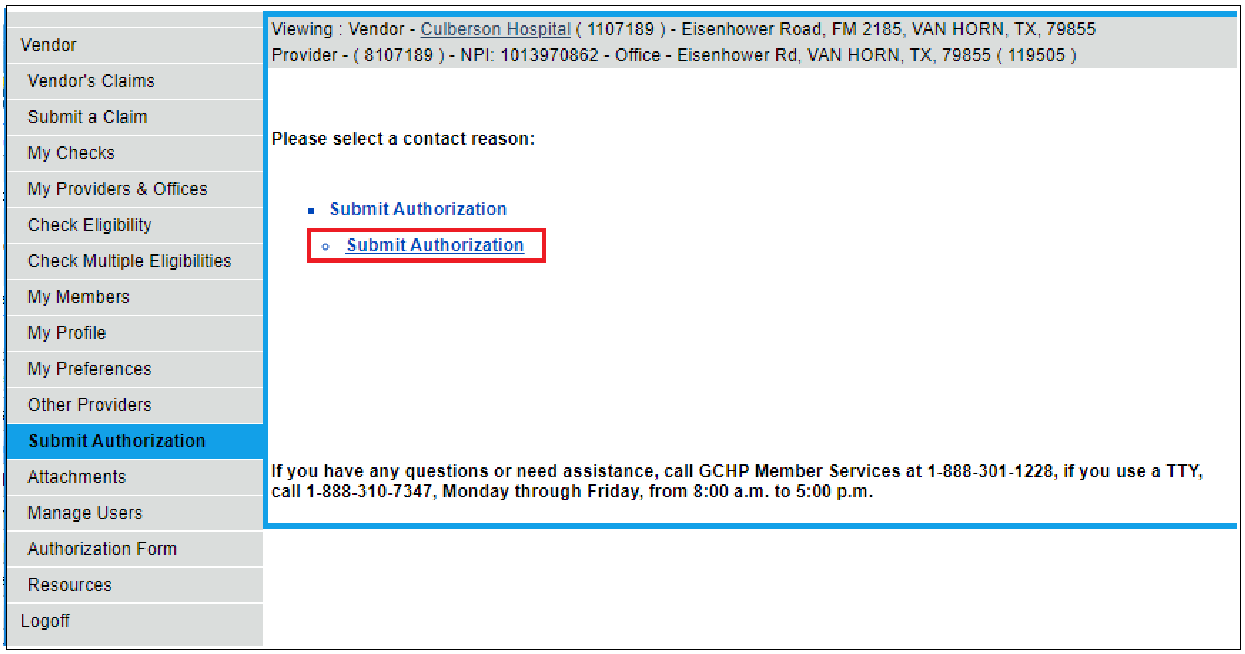


After completion of the authorization form, click “Print Form” and select “Save as PDF”. Then go the **Submit Authorization** tab to upload your Authorization Form into the system. If there are any other documents to be sent, they can also be attached on the *Submit Authorization* tab.

- The description field accommodates a maximum of 250 characters.

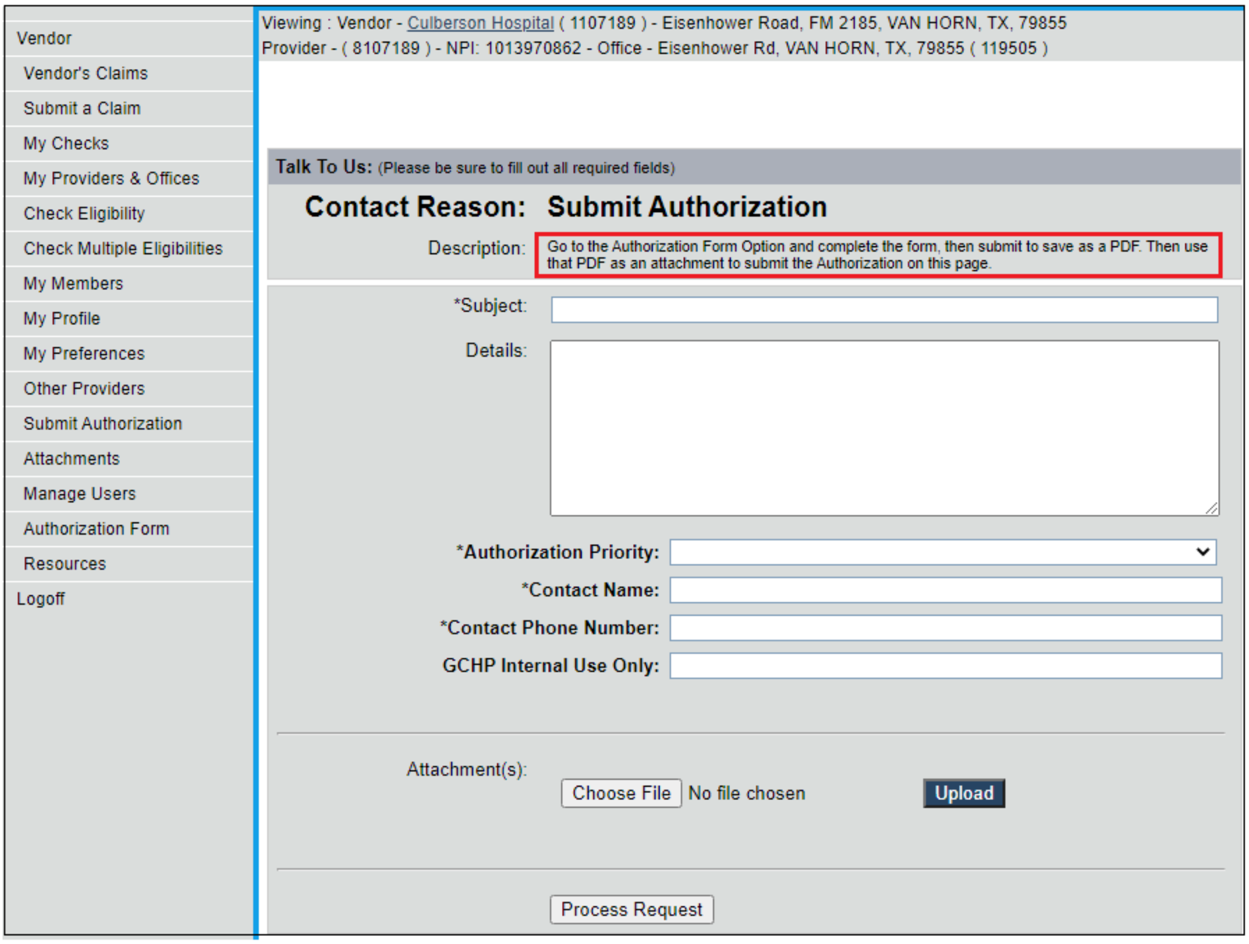
Submit Authorization

This is step two of the authorization submission process. After you save your Authorization Form as a PDF, you will upload your form in the “Submit Authorization” tab, by clicking on “Submit Authorization”.



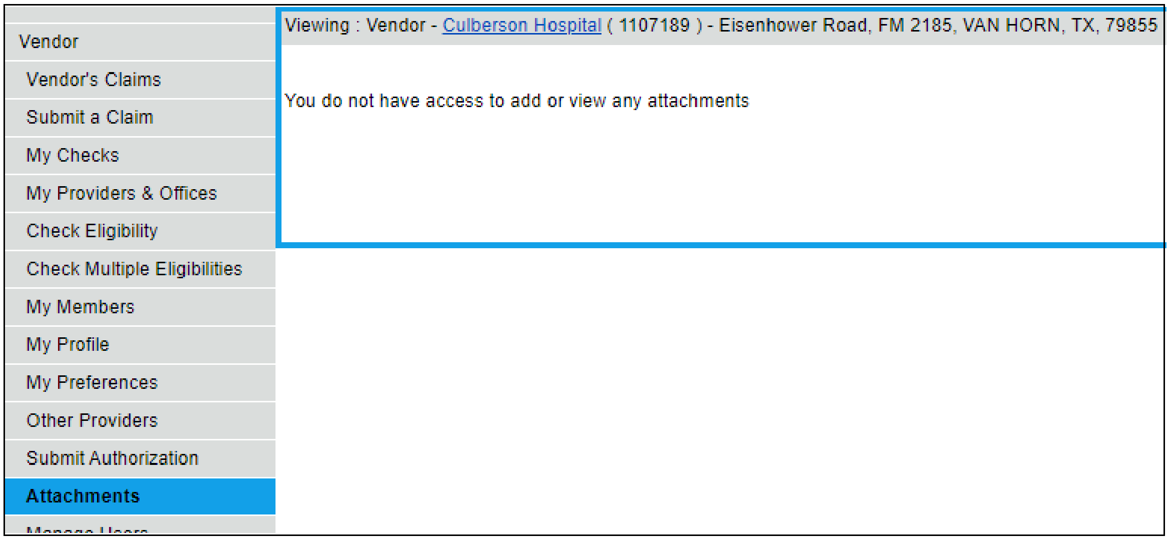
In the final step, you will complete the “**Contact Reason: Submit Authorization”** page. This works as a cover letter accompanied with your Authorization Form submission.

Please note that contact information is required as it will assist with any communication that may be required for the handling of your Authorization Form.



To check the status of your authorization submission, you must contact GCHP’s Customer Service Department at 1-888-301-1228. Currently, authorization view status is not a function of the portal.

Attachments: Currently, the "Attachments" tab is not a functioning feature.



Manage Users

The Manage Users tab allows the user to change their password and create additional user logins to allow others to access their account online.

The edit and disable hyperlinks allow the user to update the following:

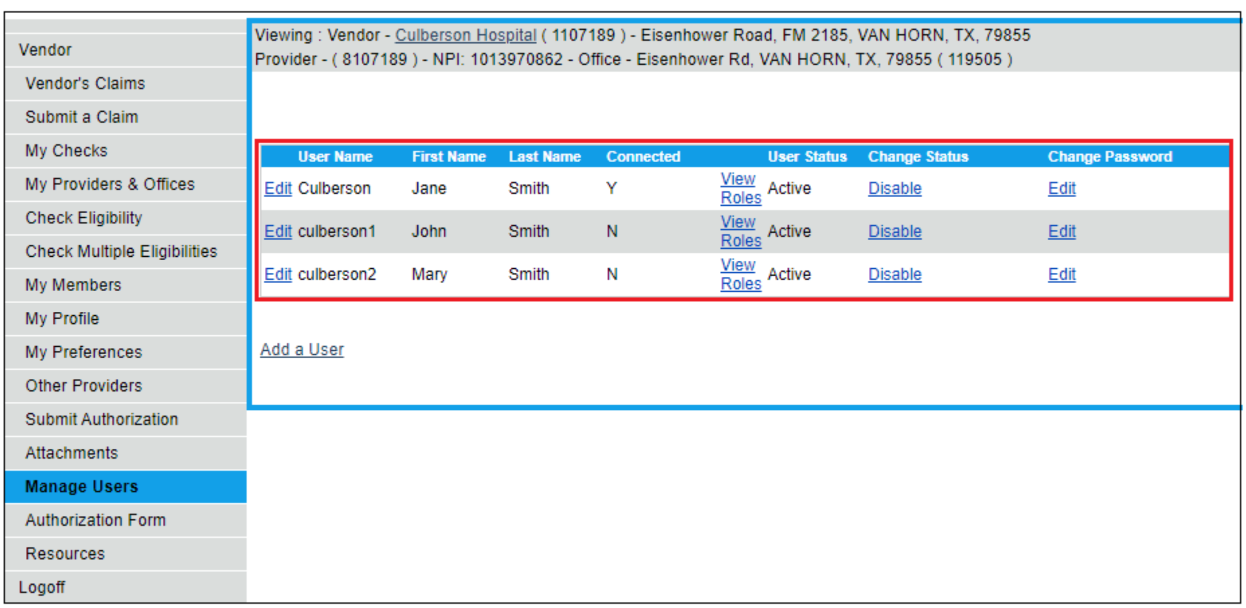
- First or last name
- Status
- Change password

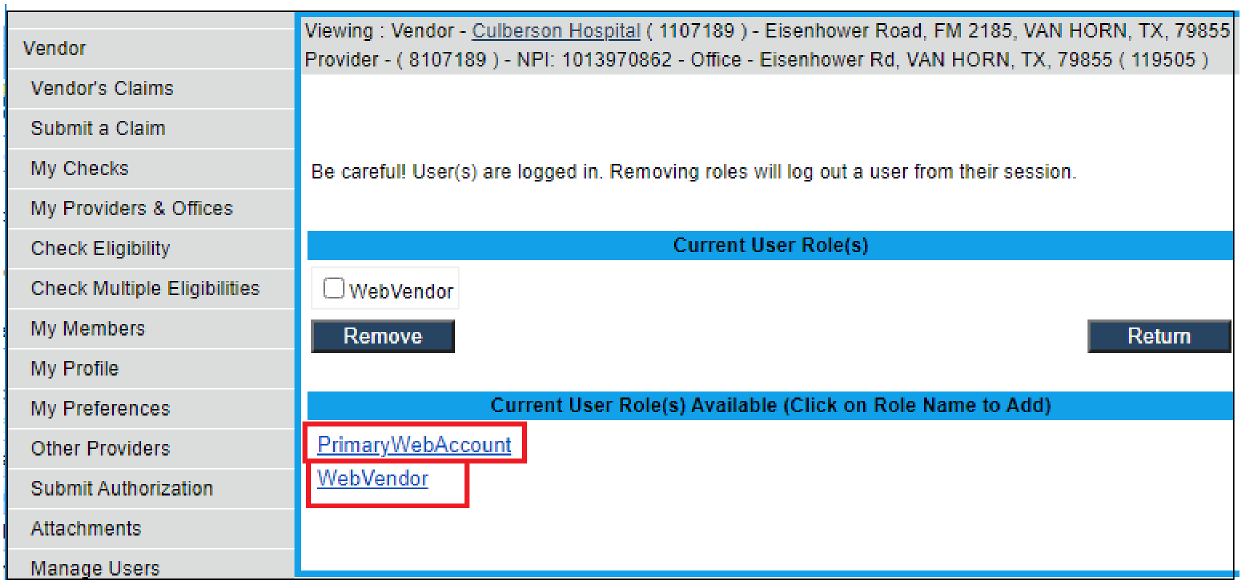
Administrative users are responsible for deactivating the accounts of staff who no longer work within your organization.

There are two Account Roles available:

Primary Web Account: This role functions as the Superuser / Administrator; can create and manage accounts.

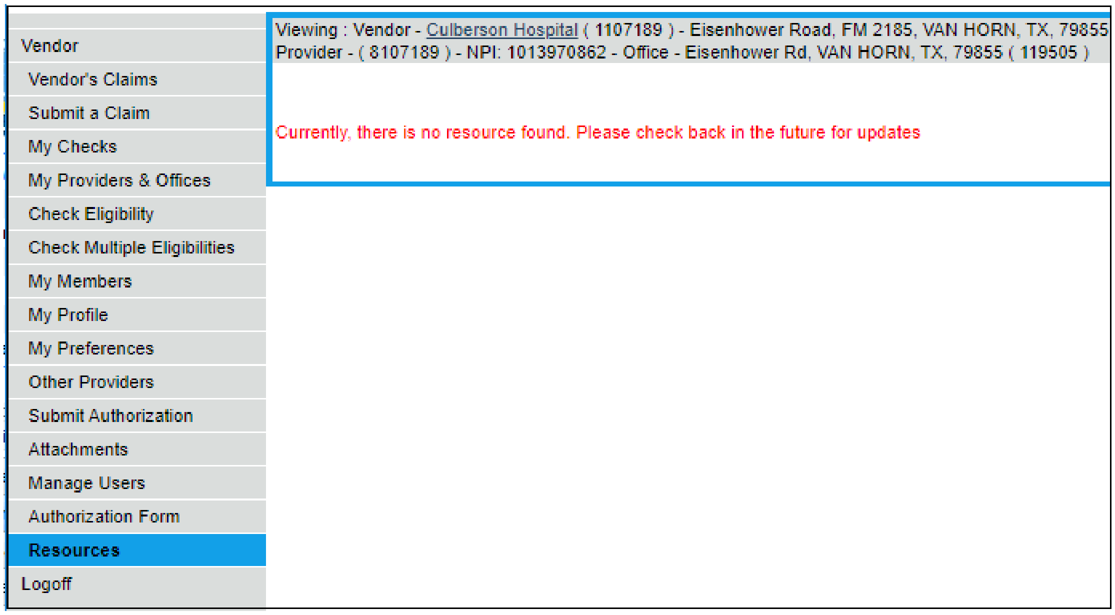
Web Role: This role functions as a child account; does not have ability to create or manage accounts. The user still can use all other Portal features within their account type. Depending on the account type, you may see this role title as WebProvider, WebOffice or WebVendor.




Vendor
Vendor's Claims
Submit a Claim
My Checks
My Providers & Offices
Check Eligibility
Check Multiple Eligibilities
My Members
My Profile
My Preferences
Other Providers
Submit Authorization
Attachments
Manage Users
Viewing : Vendor - Culberson Hospital (1107189) - Eisenhower Road, FM 2185, VAN HORN, TX, 79855
Provider - (8107189) - NPI: 1013970862 - Office - Eisenhower Rd, VAN HORN, TX, 79855 (119505)
Be careful! User(s) are logged in. Removing roles will log out a user from their session.
Current User Role(s)
WebVendor
Remove
Return
Current User Role(s) Available (Click on Role Name to Add)
PrimaryWebAccount
WebVendor

Resources

The "Resources" tab is an area that contains important news and information which pertains to our providers.



Change / Forgot Password

The Superuser or Administrative user will have the ability to change passwords in the "Manage Users" tab. This new password acts as a temporary password. The staff user will then be prompted to create their own individual password upon their log in attempt.

- Active users will be prompted to reset their password every 90 days.
- Portal sessions are logged out after the portal detects inactivity for 10 minutes.

Troubleshooting:

If you encounter technical issues, please follow these steps:

1. Assure that you are using the latest version of Google Chrome. Internet Explorer is not compatible.
2. Clear the cache in your web browser, which can be found in the Tools Options.
3. Contact your tech support to ensure you're not running into screen blocker issues.
4. Contact GCHP at 1-888-301-1228 and be prepared with a screenshot of your issue.

If you need help with the Portal, please contact GCHP's Customer Service Department at 1-888-301-1228.

Gold Coast Health Plan
A Public Entity

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