

MEDICAID PORTAL USER GUIDE

OVERVIEW

The South Dakota Provider Medicaid Portal has been a collaborative effort with providers to ensure a result that will be fully utilized by and directly beneficial to, South Dakota Medicaid Providers. The Portal allows a user to access various recipient and provider Billing National Provider Identifier (BNPI) based information.

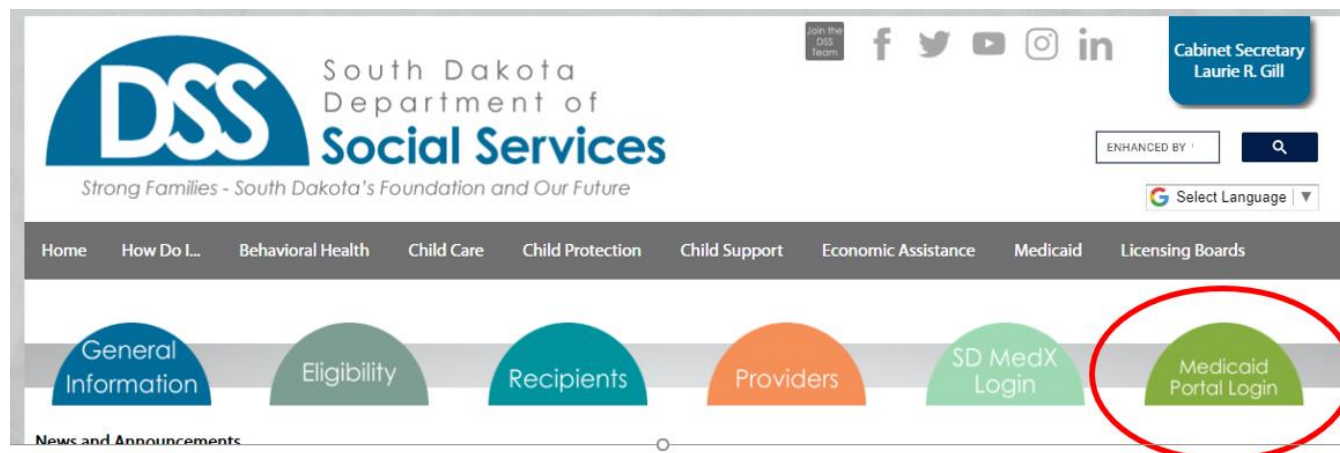
PROVIDER PORTAL WEBPAGE

The DSS Medicaid Portal webpage can be accessed via the following URL:

<https://dss.sd.gov/medicaid/portal.aspx>

The Portal webpage is updated periodically with User Documents, FAQs, and Portal related announcements from the Medicaid Portal Team.

A provider may also access the Portal via the drop-down under the Medicaid Tab of the <https://dss.sd.gov> website.



NEW REGISTRATION

The Medicaid Portal registration process accepts registration requests for one or multiple Billing NPI(s) and is not limited to the number of Billing NPIs which can be requested at one time. The organization's account administrator will assume responsibility for the oversight and administration of all additional Portal user accounts within their Billing NPIs they control. Administration includes adding users within their Billing NPI(s) and receiving requests for Portal accounts from users within their Billing NPIs. They can delegate oversight to additional Provider Admins for one or more of their Billing NPIs to help establish the appropriate levels of hierarchical access and permissions to their organization's users.

To submit a New Registration form, users must complete all required fields, add at least one Billing NPI as “requested” and check the important message acknowledgment regarding paper remittance advice. A valid combination of the following three data elements is required for a Billing NPI to be requested. The unique combination of these three values is verified against our database for accuracy before users can “ADD” a requested Billing NPI:

- The seven (7) digit SD MEDX ID – SD MEDX is the SD Medicaid Provider Enrollment system, for which your organization’s Provider Enrollment Credentialing Specialist has login credentials.
 - If you do not know the SD MEDX ID for your Billing NPI(s), please contact your organization’s Provider Enrollment Credentialing Specialist to request this information.
 - The enrollment specialist will be able to search for one or more of your organization’s Tax ID’s and provide you with a list of each unique SDMEDX ID & Billing NPI combination.
 - If the SDMEDX ID & Billing NPI combination is NOT entered correctly for each Billing NPI, the user will receive an error that “This combination is not valid.”
- Nine (9) digit Tax ID - Federal Employer Tax ID Number (FEIN or TIN) for which an organization is enrolled with SD Medicaid.
 - If you do not have a FEIN, you may be enrolled with SD Medicaid as sole ownership. In such instances, your FEIN could be your Social Security Number (SSN).
- Ten (10) digit Billing NPI – Billing National Provider Identification number(s) enrolled with SD Medicaid.
 - If enrolled with SD Medicaid as sole ownership, your “Billing” NPI could be your Type 1, Servicing NPI.

Medicaid Portal

New Registration for Provider Administration (you can request access to one or more Billing NPI's)

* Indicates required fields

Contact First Name * Contact Last Name * SDMEDX ID *

Contact Phone * Ext Tax Id *

Contact Email * Billing NPI * + ADD

Confirm Contact Email *

Contact Address * **Billing NPI's that you are requesting access to:**

State * Enter Billing NPI to search from the list below. 🔍

City * [Search Results Area]

Zip * [Search Results Area]

✓ Submit ✗ Cancel

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New Registration Contact form field information should be populated with the Requestor's business contact information. The New Registration Form Contact Email address entered will become the Requestor's Username. If the system identifies that an account has already been requested, or approved for an email address, the Requestor will receive an error that the email already exists and will not be able to submit the New Registration form. If the Requestor does not receive a submission confirmation email at the Contact Email address listed in their registration form, they may have typed their email incorrectly. If this occurs, please send an email to DSSOnlinePortal@state.sd.us regarding the email address being entered incorrectly on the pending registration request.

The Contact form fields do have some built-in functionality in place that is important to note:

- **Help Text** - When populating the Contact details, users can hover their mouse pointer over the "?" icon to display help text. Help Text defines the expected value or input, for that field.
- Asterisk (*) – Each required field is indicated with an asterisk (*) symbol. Screens containing required input fields will also display an information message that "** indicates required fields"
- **Contact Phone** – This field is formatted to only accept numeric values and to automatically populate () and – as the user types. Users will not be able to delete or modify the format in place for this field.
- **Ext.** – The extension field allows up to seven (7) numeric-only values. This is not a required field.
- **Contact Email** – The email address can only be validated for format accuracy. If users do not type in their email address correctly (i.e. misspell a word) in both email fields, they will only be aware of the error, if they do not receive an email confirmation at the expected email address they entered, within a short timeframe of submitting their request.
- **State, City & Zip** – These fields are dynamic and require users to select them in the order in which they are displayed on the screen. Once the user selects State, the City dropdown allows users to select the list of cities specific to that State. After selecting the appropriate City, the user can select the appropriate Zip code value. If the City/Zip dropdowns do not automatically populate after State is selected, the Portal may be querying the address database. Please wait a few additional seconds and try again if this occurs.
- **SDMEDX ID, Tax ID & Billing NPI** – These fields will only accept numeric values. If any combination of the three cannot be validated against the database and are incorrect, the user will receive "This combination is not valid" error, when attempting to click the "ADD" button.
- **Important Message Checkbox** – This acknowledgment must be checked to submit a New Registration request. If the user clicks "Submit" before checking the acknowledgment box, they will receive an error and their form will not be submitted.

New Registration for Provider Administration (you can request access to one or more Billing NPI's)

* indicates required fields

Contact First Name * Contact Last Name *

Please enter Contact First Name Please enter Contact Last Name

(Ext)

Please enter a valid Contact Phone Number

Contact Email *

Please enter a valid Contact Email

Confirm Contact Email *

Confirm Contact Email

Contact Address *

Contact Address is required

|

State *

City *

Please select a valid City

Zip *

Please select a valid Zip

SDMEDX ID *

SDMEDX Id is required

123 *

Tax Id is invalid

2345 *

Billing NPI is invalid + ADD

Billing NPI's that you are requesting access to:

Enter Billing NPI to search from the list below. Q


IMPORTANT: Once you are registered within this Portal your organization will no longer receive paper remittance advices. Remittance advices will be accessible immediately upon logging in.

Submit Cancel

After submitting a New Registration request, the Requestor will be directed back to the Login screen and receive a “Success” message notifying them that their request was submitted for approval. The user will also receive a confirmation email at the email address listed in their New Registration form that their request was submitted for approval.

Success

Your registration was submitted to your Administrator. You will receive an email notification upon approval.



Welcome to the DSS Online Portal
Use a valid username and password to gain access to the portal
For assistance with username and password, contact your administrator.
For more help contact the State at DSSOnlinePortal@state.sd.us

LOGIN

Username
(Note: This is your login email)

Password

Login Register Forgot Password

New Registration requests will be received by a State reviewer and will remain pending until Approved/Rejected. If there are any questions concerning the Registration request, the Requestor may be contacted directly by the State reviewer via phone or email. Incomplete or invalid registration forms will not be submitted for review. If the Reviewer cannot validate the form or confirm details in a question, the Requestor will receive an email notification that their registration request has been Rejected.

Administration Reports

Work Queue

+ Add User

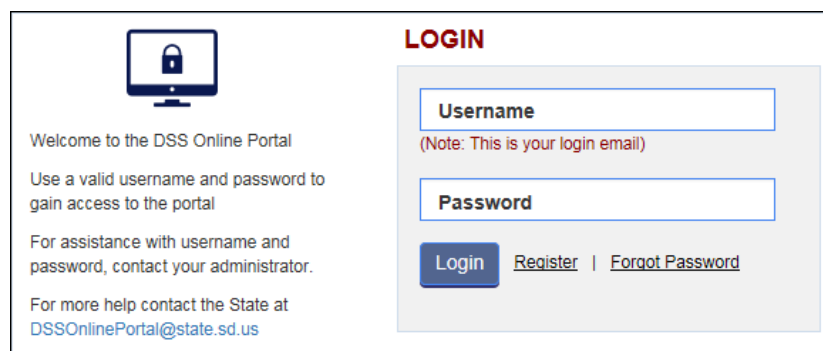
Contact Email	Contact Last Name	Contact First Name	Submit Date/Time	Provider Name	Billing NPI	Tax Id	Action
PendingRegistration@WorkQueue.com	WorkQueue	ProviderAdmin	01/25/2017	Fairview Southdale Hospital	1770663031	410991680	Accept / Reject

<< < 1 > >> Go to page: 1 Row count: 10 Showing 1-1 of 1

Once approved, the Requestor will receive an approval email confirmation with temporary login credentials and details. The initial login process must be completed within 3 days (72 hours) or the password will expire. If the request is rejected, the Requestor will receive a rejection email notification.

Login

The first time a user logs into the Medicaid Portal, they will need to log in using the Temporary Password, they received in their Portal account approval email notification. The Username for Login will always be the user's email address, for which they registered their Portal account. Temporary Passwords are only valid for 3 days (72 hours) after receipt of the approval confirmation email notification. If a user forgets or loses their password, they can select "Forgot Password" to complete the steps as outlined in the Forgot Password section.



Welcome to the DSS Online Portal

Use a valid username and password to gain access to the portal

For assistance with username and password, contact your administrator.

For more help contact the State at DSSOnlinePortal@state.sd.us

LOGIN

Username
(Note: This is your login email)

Password

Login Register | Forgot Password

When logging in for the first time, users will be prompted to enter their Login Username and temporary password. After successful login, users will be directed to the Change Password form where they will need to complete the following:

- Re-enter Temporary Password - The password received via email.
- Type in a New Password - Please note the State Password Security Standards, below.
- Retype New Password - The New Password entered and the Retype New Password to confirm. If the new password and re-typed password do not match, the user will receive an error.
- Select three Security Questions and Responses - These Security Questions and Responses will be used for the "Forgot Password" functionality.
- Username - The Username field is grayed out on the "Change Password" form. The Contact Email Address submitted on the Registration form or when the user account was added, becomes the unique account Username.
 - Email addresses cannot be duplicated, and users will not be able to have two Active accounts for the same Username.
 - If a User's email address changes, their Portal Provider Admin will need to update the user's account to "Inactive" status and create a new Account for them under their new email address.

The screenshot shows the 'Change Password' page in the Medicaid Portal. At the top left is the 'Medicaid Portal' logo. At the top right, it says 'You are logged in as [username]'. Below that are links for 'User Guide' and 'FAQ'. The main heading is 'Change Password'. A note indicates that an asterisk (*) denotes required fields. The form contains the following fields and instructions:

- Username:** A text input field with a red asterisk. A note below it says '(Note: This is your login email)'. A red asterisk is also present to the right of the field.
- Old Password:** A text input field with a red asterisk.
- New Password:** A text input field with a red asterisk. A note below it says '(Note: Password should be 8 to 15 characters)'. A red asterisk is also present to the right of the field.
- Retype New Password:** A text input field with a red asterisk.
- Security Questions:** A section titled 'Please select security questions and provide answers. Each security question should be unique.' It contains a dropdown menu with '--Select--' and a text input field, both with red asterisks.

At the bottom of the form are 'Submit' and 'Cancel' buttons. The footer contains the following text: '© 2016 - 2021 State of South Dakota MMIS, All Rights Reserved.' and a navigation menu with links for 'Home', 'State Home Page', 'Disclaimer', 'Accessibility', 'Privacy Policy', 'Contact Us', and 'HIPAA'. Below the navigation menu is the address '700 Governors Drive | Pierre, SD 57501' and the phone number '605.773.3495'.

State Password Requirements & Security Standards

The following are State Standards for Passwords, including those used in the Portal. When considering your Portal password, please review and apply these standards to ensure compliance with State Security Standards:

- Must be changed every ninety days;
- Must be at least eight characters;
- Must contain at least three of the following four-character groups:
 - English uppercase characters (A through Z);
 - English lowercase characters (a through z);
 - Numerals (0 through 9);
 - Non-alphabetic characters (!, \$, #, %)
- Must not be one of the six most recent passwords;
- Must not have been changed within the last seven days;
- Does not contain your account or full name that exceeds two consecutive characters.

PROVIDER ADMIN

Provider Admin accounts will be responsible for Medicaid Portal oversight and management of, all User Administrative functions within the Portal, for their Billing NPI(s). The Provider Admin will be granted all available Permissions by default, including Administration permissions.

Administration Permissions

Administration Permissions are only available to the Provider Admin User Role. The Administration Menu includes a subset menu for performing additional administrative functions. The available sub-menu options are Audit Trail, User Maintenance, Work Queue. The Provider Admin role will have the ability to perform all Administration functionality by default. The Provider User role cannot be assigned to Administration functionality.

Audit Trail

Administrative Audit Trail allows the Provider Admin to see what a Provider User is accessing during a time period.

Administrative Audit Trail

Searches for report types "All", "Claim Submission", and "PCP forms" are limited to 1 month at a time. The remaining searches are limited to 6 months at a time. Audit information is available for 7 years from today's date.

Type, From and To dates are required. Additionally one of the following are required: Email, Billing NPI or Servicing NPI

Type: [v] From: [calendar] To: [calendar] Email: [v] Billing NPI: [input] Servicing NPI: [input]

Select One: [1234567890] [1122334455] [Add] [Reset]

User Maintenance

The User Maintenance menu is in the Administration sub-menu. By navigating to Administration and clicking User Maintenance, the Provider Admin will be able to: Add User, view user list, search, filter, reset user list to the default view, and export their list of users. From this menu, the Provider Admin can also Update a user account by selecting "Update" in the Action column for that user. The default view for Users will populate with Active user accounts although the admin can select to view "All" or "Inactive" status users, from the Status dropdown filter, then click "Search" to view all active and inactive users. The Export Users functionality allows Provider Admins to export their user list to Excel. This export functionality will automatically export and open a list of users in Excel, for the admin to perform any additional user maintenance or necessary filtering.

Users Maintenance

+ Add User [Export Users]

Email: [input] Billing NPI: [input] Tax Id: [input] Contact Name: [input] Roles: [v] Status: [v] [Search] [Reset]

Contact Email	Contact Last Name	Contact First Name	Role	Accept Date	Status	Action
+ jane.doe@provider.demo	Doe	Jane	Provider Admin	11/29/2016	Active	[Update]
+ joseph.smith@provider.demo	Smith	Joseph	Provider User	11/22/2016	Active	[Update]

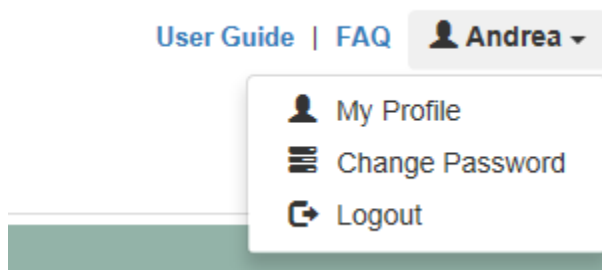
The Users list will be displayed in a collapsed view, by default. When collapsed, the user list displays each user's Contact Email, Contact Last Name, Contact First Name, Role, Status, and Update information in the collapsed view. When a user's account detail is expanded, the Provider Admin can also see the individual user's account access, including Billing Provider Name, Billing NPI, Tax ID, Servicing Provider Name, and Service NPI. To expand or collapse a user's account, click the '+' sign located to the left of the user's Contact Email. When expanded, the '+' sign becomes a '-' sign which can be clicked to collapse the user's account details.

In the expanded user detail view, the admin will be able to see the user's name and access details, differentiated by a different color scheme to indicate which specific user and access, the admin is viewing. If the admin wishes to update that user's access, they can click Update for the individual user's account, whether expanded or collapsed.

Add User General Information

Provider Admin users can add additional Provider Admin and Provider User types within their Medicaid Portal account structure for the appropriate access. It is recommended that the primary Provider Admin user create an additional Provider Admin user to assist with registration requests and Medicaid Portal account maintenance for their organization, in the event of their absence. The eventual addition of new functionality, addition of reports and other abilities, may also mean that the creation of admin users within various business lines of an organization (i.e. Managed Care, Health Home, Medicaid, etc.) to facilitate the appropriate addition of users which will require access and permissions for their relevant reports and information.

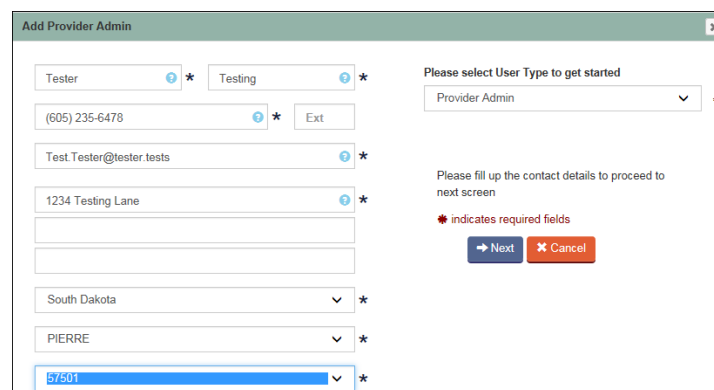
Provider Admins can "Add User" accounts for any of the Billing NPIs that their Portal account controls. To review a list of NPI's which a user controls or has access to; users can navigate to their "My Profile" screen. This option is available within all account types and can be located by, navigating to your Account Profile, clicking the down arrow, and then selecting My Profile from the sub-menu. The My Profile screen will display a list box populated with the Billing NPIs available to a Provider Admin account profile. The Billing NPIs listed for a Provider Admin account are those that Admin user account has permissions to add, update and approve/reject, Provider Admin or Provider User accounts for.



Add Provider Admin

The Provider Admin can create accounts for multiple Provider Admins to aid in establishing and delegating the desired account hierarchy within an organization. These additional Admin users will have the ability to create and update and manage users within the Billing NPI(s) assigned to their account. These additional administrative users will also receive email notifications, generated as a result of New Registration requests from additional Provider Admin users within their Billing NPIs for review and approval/rejection.

- Add a Provider Admin user account
 - Hover the mouse over Administration
 - Select User Maintenance from the sub-menu
 - Select the Add User Button
 - Select “Provider Admin” from the User Type dropdown list
 - Enter Contact information into required Add Provider Admin contact fields



- Click Next to proceed to the second Add Provider Admin screen
- Provider Admin accounts must have at least one Billing NPI populated in the Billing NPI's list box that you are granting access to.
 - Select the Billing NPI value, or list of Billing NPI values for the user's account access, displayed in the Billing NPI list
 - Users can select Billing NPIs one at a time by checking individual Billing NPI boxes
 - Select multiple Billing NPIs by checking Select All checkbox above the Billing NPI list
 - Search for a Billing NPI by entering it into the search box and clicking the search icon to search for and locate an individual NPI in a list
 - Click Add to populate Billing NPI(s) in the Billing NPI's list box, that you are granting access to.
 - Add one Billing NPI at a time, or select multiple Billing NPIs to add at once
 - The Add button will only populate a Billing NPI into the user's BNPI access list if the Billing NPI value has not already been added.
 - If the user selects a Billing NPI and clicks Add, the Billing NPI will only be added into the access requested list box, if it has not already been added. This is to prevent duplicates

- If a Billing NPI is added in error, the user can click the red 'x' next to that Billing NPI in the Billing NPI's that you are granting access to list box to remove it
- Users will be able to populate a value into the "Enter Billing NPI to search from the list below" search box, to locate a Billing NPI from a large list of assigned Billing NPIs
- When located, the Billing NPI value will be displayed in red

The screenshot shows the 'Add Provider User' interface. It features four main sections for data entry:

- Billing NPI:** A search box and a list of NPIs. One NPI, 1234567890, is selected with a checkmark.
- Billing NPI - Servicing NPI:** A search box and a list of NPI pairs. Two pairs are shown: 1234567890 - 1234567890 and 1234567890 - 1233344445. An 'Add' button is located to the right of this list.
- Billing NPI's that you are granting access to:** A search box with the placeholder text 'Enter Billing NPI to search from the list below' and a large empty list area.
- Permissions Available:** A list of permissions including 'Adjudicated Claims Listing', 'Census Status Report', 'Claim Submission', 'Claim Submission View', 'Communications Modify', 'Communications View Only', 'Eligibility', 'H.Home - Case Load', and 'U.Home - Claims Paid'.
- Permissions Selected:** A search box and a large empty list area.

Navigation buttons at the bottom right include 'Back', 'Add', and 'Cancel'.

- The user will receive confirmation that the Billing NPI has been added successfully. Click "OK" to proceed
- After selecting the desired Billing NPI(s) for that user's account Billing NPI access, the final step is to review the user's Permissions Selected
 - Provider Admin users will be assigned all available Permissions Selected, by default.
 - To modify a user's Permissions Selected options, click on the Permission name
 - If selected, the Permission will be highlighted in orange for the user
 - To remove the selected Permission, click the left arrow
 - The Permission Available box will contain the removed Permission
- Click green Add button between the "Back" and "Cancel" buttons
 - User will receive a popup window notification, prompting them to confirm they wish to proceed
 - By clicking "Ok" the Add User form will be submitted
 - By clicking "Cancel" the Add User form will not be submitted, allowing the user to make changes before submitting the form
- The newly added Provider Admin user account will now populate into the Users list

Add Provider User

The Provider Admin user type is the only user type that can create a Provider User account. The main differentiation between adding a Provider User and Provider Admin is the functionality to assign user access and permissions, at the Servicing NPI level. The Provider User's access can be restricted by the Servicing NPI(s) associated with a single Billing NPI that they can access. A Provider Admin user has all Servicing NPI(s) associated with all Billing NPI(s) they control, by default. The Provider User account permissions will not contain Administration. This user type will not have the ability to perform user maintenance or other administrative functions, in the Portal. This user type should be considered "read-only" although they will have access to generate, view, save and print Reports as well as the future capabilities of Eligibility Status Inquiries if granted by their Provider Admin.

- Add a Provider User account (this is like adding a Provider Admin)
- Click Administration
- Select Add User sub-menu option
- Select "Provider User" from the User Type dropdown list
- Enter Contact information into required Add Provider User contact information fields

The screenshot shows a web form titled "Add Provider User". On the left side, there are several input fields, each with an asterisk indicating it is required. The fields are: "Name" (containing "Sam"), "TestName", "Phone" (containing "(654) 987-1230" and an "Ext" field), "Email" (containing "sam.testname@test.test"), "Address" (containing "1235 Testing Way"), "State" (a dropdown menu set to "South Dakota"), "City" (a dropdown menu set to "PIERRE"), and "Zip" (a dropdown menu set to "57501"). On the right side, there is a dropdown menu for "User Type" set to "Provider User". Below this, there is a message: "Please fill up the contact details to proceed to next screen" and a legend: "* indicates required fields". At the bottom right, there are two buttons: "Next" (with a right arrow) and "Cancel".

- Continue following the Add Provider instructions above
- After selecting and adding all required Billing NPI(s) – Servicing NPI(s) for that user's account access, the final step is to review the user's Permissions Selected
 - To remove a Permission Selected or add a Permission Available
 - Click on the Permission name to select it
 - "selected" permission will be highlighted to indicate it has been selected
 - Click the left arrow button to move a selected Permission into the Permissions Available list
 - Click the right arrow to move a selected Permission into the Permissions Selected list
 - Users can select multiple checkboxes to move multiple Permissions, simultaneously

- Click green Add button between the “Back” and “Cancel” buttons
 - User will receive a popup window notification, prompting them to confirm they wish to proceed
 - By clicking “Ok” the Add User form will be submitted
 - By clicking “Cancel” the Add User form will not be submitted, allowing the user to make changes before submitting the form
- The newly added Provider User account will now populate into the Users list

Work Queue

Provider Admin users must check their Work Queue regularly for pending Registration requests. If a Provider Admin has a pending request in their Work Queue that has not been approved or rejected within three days of the user submitting their Registration form, the Provider Admin user will receive an email notification regarding the awaiting request. Provider Admin users will only receive a Registration Request in their Work Queue when the Requestor has included the Billing NPI(s) which are administered and controlled by their Provider Admin account access. If the Requestor submits a request that includes more Billing NPIs or a combination of Billing NPIs for which the Provider Admin does not already administer access to, the Registration Request will not go into that Provider Admin’s Work Queue. If the Requestor submits a request for access to one or more of the Billing NPIs that the Provider Admin currently administers access to, that request will be sent to the Provider Admin’s Work Queue.

Contact Email	Contact Last Name	Contact First Name	Submit Date/Time	Provider Name	Billing NPI	Tax Id	Action
123provider@office.com	Doe	Jane	11/03/2019	123 Health	1234567819	444555666	Accept / Reject
test123@gmail.com	Smith	Jack	11/15/2019	Health 1	1122334455	455466477	Accept / Reject

Accept/Reject Provider Admin Registration Request

Provider Admins will receive all registration requests for any Billing NPIs they control, in their Work Queue. The admin must click Accept/Reject in the Action column to open that user's registration request. The Accept/Reject registration request window will then open and display the user's contact information in the first Accept/Reject screen.

To Accept/Reject a User's Registration Request:

1. In the Work Queue, click "Accept/Reject" from the Action column
2. The Accept/Reject Provider Admin screen will open to the user's Contact form details
 - a. The Provider Admin will not be able to update or modify the contact details within a registration request
 1. Once submitted, the Contact form field details cannot be modified
 2. If the user did not complete the form appropriately, the Admin should reject the request.

Accept / Reject Provider Admin

ProviderAdmin * WorkQueue *

(123) 456-7890 * Ext

PendingRegistration@WorkQueue.com *

1234 Registration Request *

South Dakota *

PIERRE *

57501 *

Please select User Type to get started

Provider Admin

Please fill up the contact details to proceed to next screen

* indicates required fields

Next Cancel

3. Click Next to proceed to the second Accept/Reject Provider Admin screen
4. The Provider Admin should review the user's requested Billing NPI access
 - a. The Provider Admin should confirm that the Billing NPIs being granted to that user are legitimate and that there are no obvious Billing NPIs omitted from their request, in error
5. Confirm that the user should have all listed Permissions Selected values and remove any unnecessary Permissions (if any)
 - a. To remove a permission, click on the Permission to select it
 - b. Click the left arrow to move it into the Permissions Available list
6. Click Accept to approve the user's registration request or
7. Click Reject to Deny the user's registration request.
8. User must click "OK" or "Cancel" on the confirmation to proceed message window
 - a. Clicking "Cancel" will return the user to the Accept/Reject screen to make additional changes if necessary
 - b. Clicking "OK" will proceed with the approval or rejection email generation process
9. Approved users will be added into the Provider Admin's Users list

Update Provider Admin

An organization's Provider Admin users can update User profile information, including changing a user's contact information, resetting their password, inactivating a user, adding/removing Billing NPI access, and adding/removing Permissions. To perform an Update, the administrator must navigate to their Users list. Within the list of Users, the administrator will then need to select Update from the Action column to make the necessary modifications to the user's existing account profile.

Contact Email	Contact Last Name	Contact First Name	Role	Status	Action
+ sam.test@testing.test	Tester	Sam	Provider Admin	Active	Update
+ tester.testerson@testers.test	Testerson	Tester	Provider User	Active	Update
+ tester.testname@tests.test	TestName	Tester	Provider Admin	Active	Update
+ atestertests@testing tests	Tester	Testing	Provider Admin	Active	Update

To Update Provider Admin user account details:

1. Click Update from the Action column, for the user which is being modified
2. The first Update Provider Admin screen will be displayed, allowing the administrator to make necessary changes to the user's contact information
 - a. The user's Email field cannot be updated. If a user's email address changes, the administrator must first Inactivate that user's account and create a new account
 - b. If the user is being made "Inactive" the administrator must click the "Inactive" checkbox and click Next
 1. Click the Update button in second Update Provider Admin screen
 2. Click "OK" on the prompt to proceed with the update to submit the changes
 3. Click "Cancel" on the prompt to proceed with the update to cancel the changes and return to the Update Provider Admin screen
 - c. To perform a "Reset Password" the administrator must click "RESET PASSWORD" then
 1. Click "OK" to confirm the process to reset the user's password
 2. Click "Cancel" to return to Update Provider Admin screen, canceling the password reset

3. Click Next to proceed to the second Update Provider Admin screen
4. Perform any necessary updates to the user's Billing NPI access
 - a. To remove a Billing NPI, click the red 'x' for the Billing NPI populated in the Billing NPI granted access list
 - b. To add a Billing NPI to the user's existing permissions, perform the Add Billing NPI steps as defined in the Add Provider Admin screen 2 steps.
5. Perform any necessary updates to the user's Permissions by selecting and moving the desired permissions into the appropriate list
 - a. Permissions *NOT* assigned to a user profile will be displayed in the Permissions Available list
 - b. Permissions currently assigned to a user profile will be displayed in the Permissions Selected list
6. Click the Update button to complete and save the changes
 - a. Click "OK" to confirm you wish to proceed with making the updates to this user's account
 - b. Click "Cancel" to return to the Update Provider Admin screen and made additional changes

After performing updates to a user's account, the changes to their account will be available for review in the user's account details in their My Profile sub-menu

The screenshot shows the 'Update Provider User' interface. It features four main sections for configuration:

- Billing NPI:** A search bar and a list of NPIs. One NPI, 123456789, is selected with a checkmark.
- Billing NPI - Servicing NPI:** A search bar and a list of NPIs. One NPI, 1234567891 - 1234567899, is selected with a checkmark.
- Billing NPI's that you are granting access to:** A search bar and a list of NPIs. One NPI, 1234567891 - 1234567899, is selected with a checkmark.
- Permissions Available:** A list of permissions with checkboxes. Selected permissions include 'Adjudicated Claims Listing', 'Census Status Report', 'Communications Modify', 'Communications View Only', 'H.Home - Case Load', 'H.Home - Claims Paid', 'H.Home - Core Services', and 'H.Home - RA'.
- Permissions Selected:** A list of permissions with checkboxes. Selected permissions include 'Claim Submission', 'Claim Submission View', 'Eligibility', 'Medicaid Remit Advice', and 'Claim Submission View'.

At the bottom right, there are three buttons: 'Back' (blue), 'Update' (green), and 'Cancel' (red).

Update Provider User

The process to update a Provider User account will be like the Update Provider Admin process, apart from choosing to modify that user's Billing NPI – Servicing NPI account access and the inability to add administrative Permissions to their account. In the Update Provider User screen one, the administrator will be able to perform the same updates to a Provider User's contact details, inactivate their account, and reset their password as described in the Update Provider Admin process above.

To Update Provider User account details:

1. Locate the user's account in your Users list and click Update
2. Perform all necessary updates to the user's contact information
 - a. Click the inactive checkbox to inactivate the user's account, then click Next to complete the process of inactivating a user

- b. Click RESET PASSWORD button to create a new system-generated, temporary password to be sent to the user's email address

Update Provider User

Tester * Testerson *

(605) 773-1234 * Ext

testerson@testerson.test *

1234 Testing Lane *

South Dakota *

PIERRE *

57501 *

Please select User Type to get started

Provider User

InActive

RESET PASSWORD

Please fill up the contact details to proceed to next screen

* indicates required fields

Next Cancel

3. Click Next to proceed to the second Update Provider User screen
4. Perform any necessary updates to the user's Billing NPI – Servicing NPI access
 - a. To remove a Billing NPI – Servicing NPI combination, click the red 'x' next to that value in the Billing NPI granted access to list
 - b. To add a Billing NPI – Servicing NPI combination to the user's existing access, perform the Add Billing NPI – Servicing NPI steps as defined in the Add Provider User screen 2 steps.
5. Perform any necessary updates to the user's Permissions by selecting and moving the desired permissions into the appropriate list
 - a. Permissions *NOT* assigned to a user profile will be displayed in the Permissions Available list
 - b. Permissions currently assigned to a user profile will be displayed in the Permissions Selected list
6. Click the Update button to complete and save the changes
 - a. Click "OK" to confirm you wish to proceed with making the updates to this user's account
 - b. Click "Cancel" to return to the Update Provider Admin screen and made additional changes
7. After performing updates to a user's account, the changes to their account will be available for review in the user's account details in their My Profile sub-menu