Hewlett Packard
Enterprise

RI Medicaid Healthcare Portal

Registering to use the HCP – for Enrolled Trading Partners

November, 2015

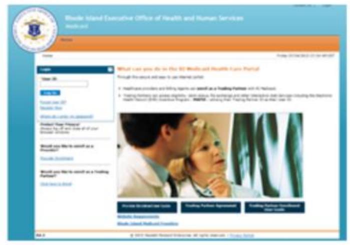
PR0053 V1.3 11.01.2015

EXECUTIVE OFFICE OF
HEALTH & HUMAN SERVICES
STATE OF RHODE ISLAND

What is the Healthcare Portal?

- The Healthcare Portal provides access to verification of eligibility, claim status, remittance advice, and other business functions.
- All enrolled Trading Partners need to register to use the portal
- Trading Partners need their existing Trading Partner ID, tax ID (FEIN), and their Trading Partner name as originally enrolled to complete the registration process
- Access the Healthcare Portal through this link:

  www.riproviderportal.org



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Healthcare Portal Registration

How to use this guide:

- Each page will walk you through the steps to register to use the Healthcare Portal
- The top of the page will show what you will see on the screen, and highlight important parts
- The bottom of the page gives more detailed instructions
- Print a copy of this guide to have on hand as you complete the registration process.

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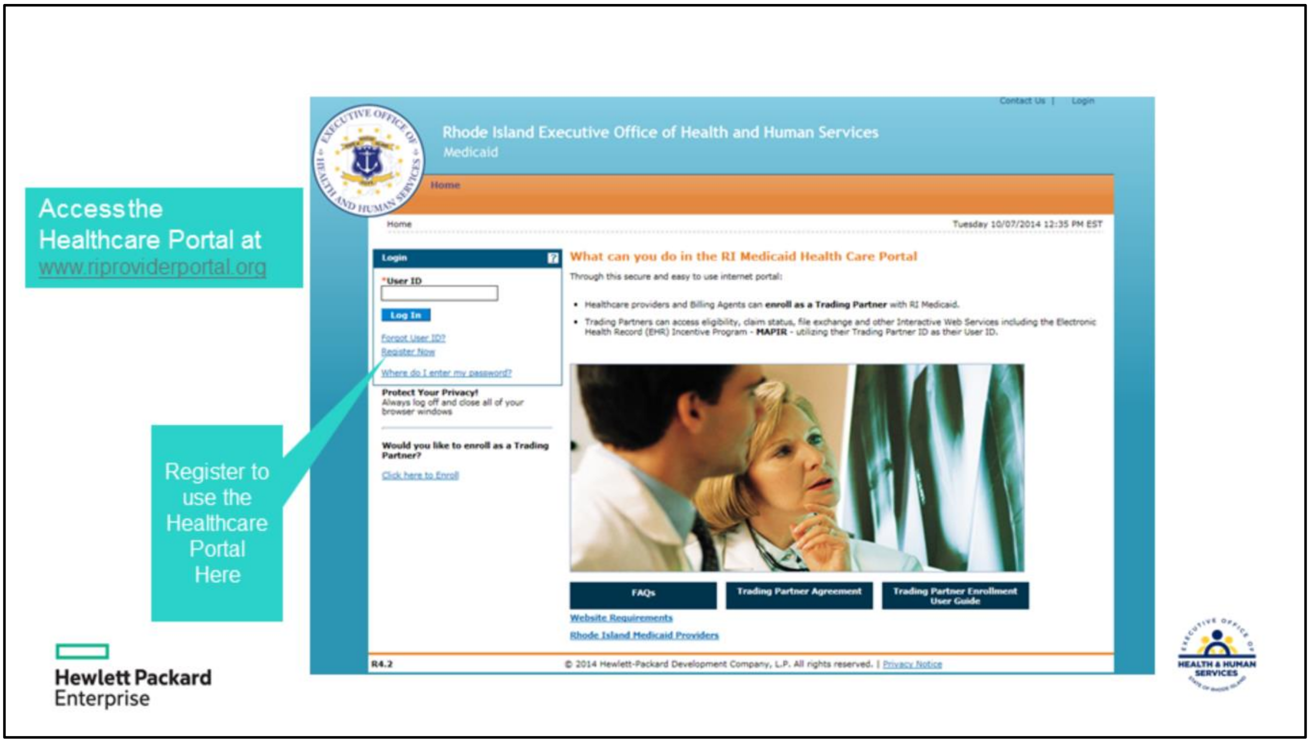
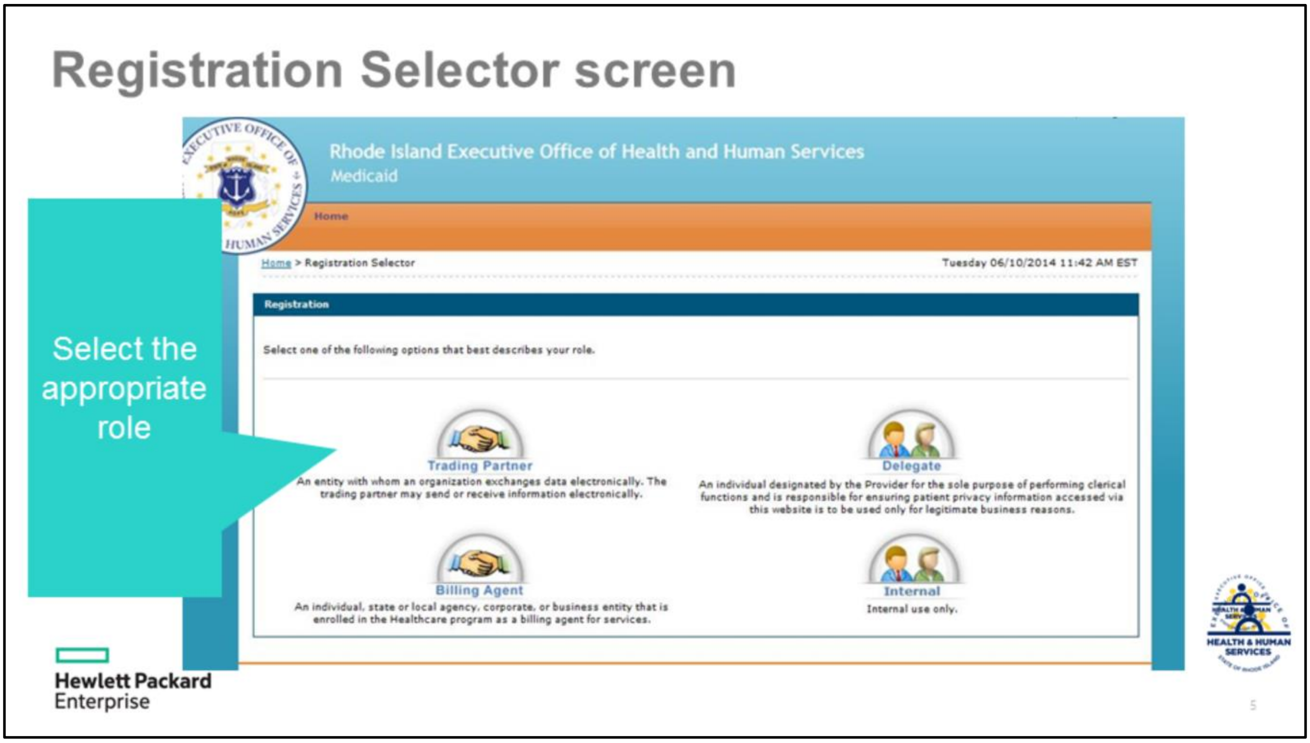
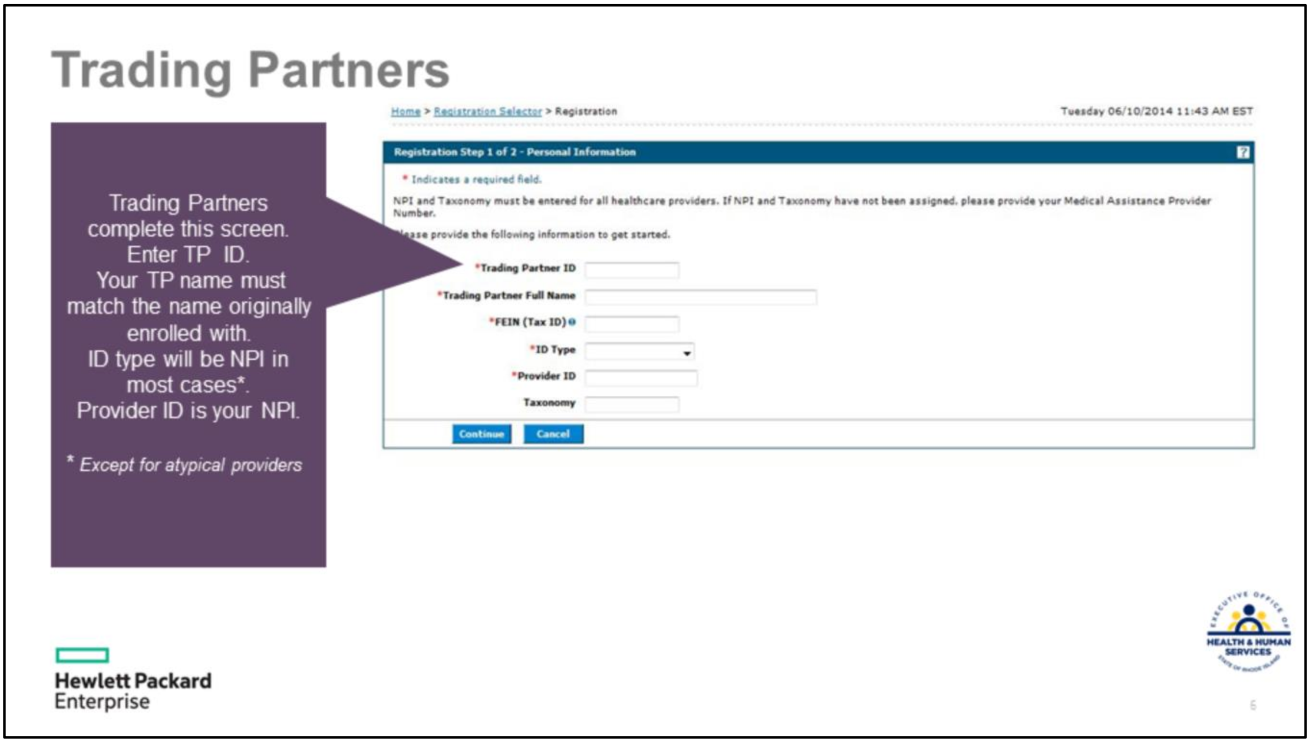
Healthcare Portal Registration



- Registration for the Healthcare Portal is accessed from the Provider Welcome Page of the Healthcare Portal.
- The arrow shows where Trading Partners will click to **register** to use the portal

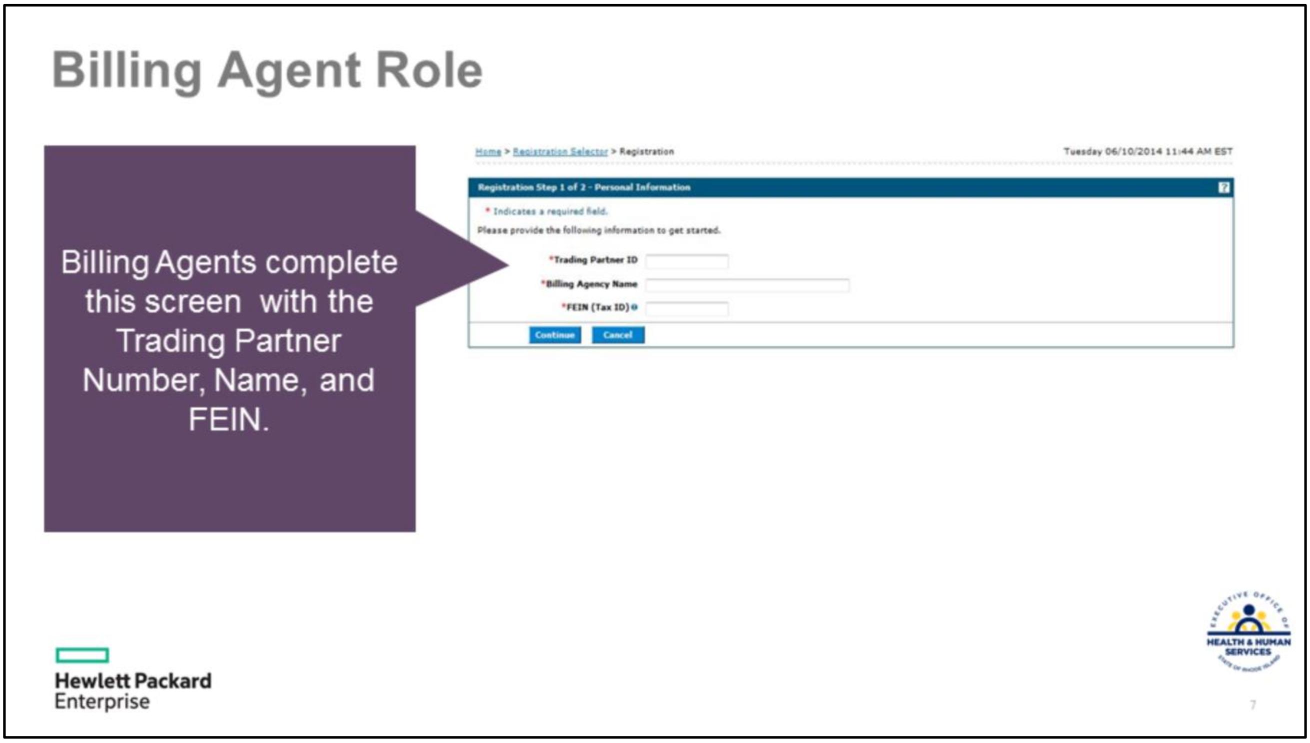


- When you click **Register Now**, this screen will appear.
- On this screen, you must select the option that best describes your role.
- **Providers** will click on **Trading Partners**.
- **Billing agents and Clearinghouses** click on **Billing Agent**.
- **Subordinate** users will need to click on **Delegate** – the new terminology.
- **Delegates cannot register until the Trading Partner registers**. This will be described later in this guide.



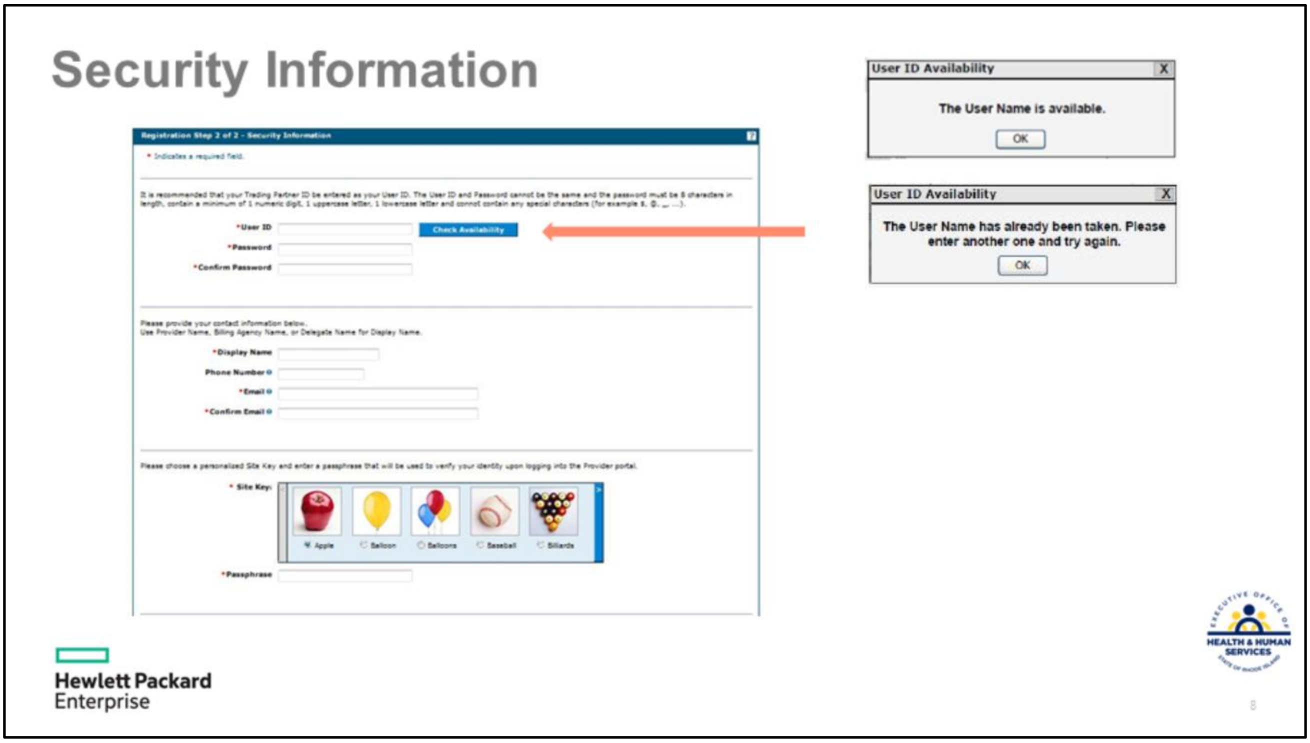
TRADING PARTNER ROLE

- If Trading Partner is selected by a provider, the user will be brought to this screen and will need to enter all of this information.
- Users will enter their Trading Partner ID (the number that begins with 60 or 71) and the Trading Partner name.
- Remember the name must match the name you enrolled with originally.
- Tax ID must then be entered.
- ID type will be NPI for most Trading Partners, or Medicaid ID for atypical providers who do not qualify for an NPI.
- The ID number will then be entered on the Provider ID line. If the provider has an NPI – **the NPI must be put here** and not the Medicaid ID. That will error back to you.
- Do not enter taxonomy
- Click continue



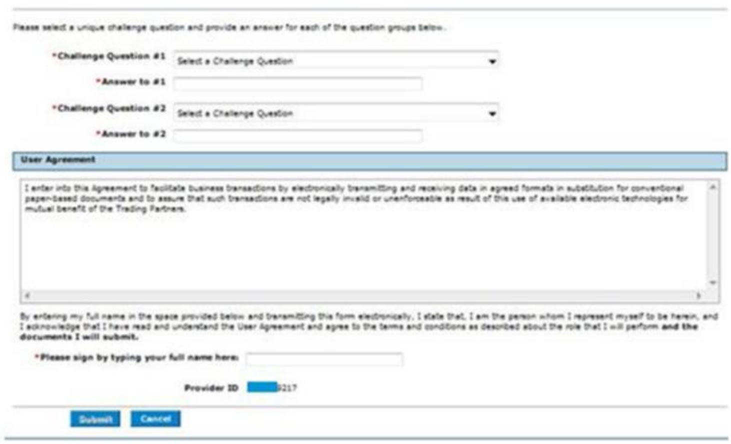
BILLING AGENT ROLE

- If Billing agent is selected, you will be brought to this screen
- You are still considered a trading partner but within the portal we make the distinction between billing agents and providers.
- Enter the Billing Agency name and the Tax ID.
- Click continue



- Trading Partners and Billing Agents are both brought to this security screen.
- The first step is to select your user name. **The user name should be your Trading Partner number** as before. If you click on the check availability box, it should return that it is available, since you are the only one with that number. If you get an error that it is in use, be sure to verify that you are using the correct Trading Partner number.
- Then you will choose a password, following guidelines on top of the page. (8 characters, minimum of 1 number, 1 uppercase letter, 1 lower case, no special characters)
- The display name is how your user name will appear – You might want display name to be your facility/company name, example: XXX Medical Associates, or XXX Medical Billing Co. or you can use your trading partner number again.
- Complete the phone number, and email address fields
- Select a site key of your choice and a passphrase for security. The passphrase is **not** the password. The passphrase is one more level of security. It should be something known to you....like *iloveicecream* or describe your selected site key (ex. turtle) (20 character limit)

Security – part 2


Please select a unique challenge question and provide an answer for each of the question groups below.

*Challenge Question #1 Select a Challenge Question
*Answer to #1
*Challenge Question #2 Select a Challenge Question
*Answer to #2

User Agreement

I enter into this Agreement to facilitate business transactions by electronically transmitting and receiving data in agreed formats in substitution for conventional paper-based documents and to assure that such transactions are not legally invalid or unenforceable as result of this use of available electronic technologies for mutual benefit of the Trading Partners.

By entering my full name in the space provided below and transmitting this form electronically, I state that, I am the person whom I represent myself to be herein, and I acknowledge that I have read and understand the User Agreement and agree to the terms and conditions as described about the role that I will perform **and the documents I will submit.**

*Please sign by typing your full name here:

Provider ID [redacted]217

Submit Cancel

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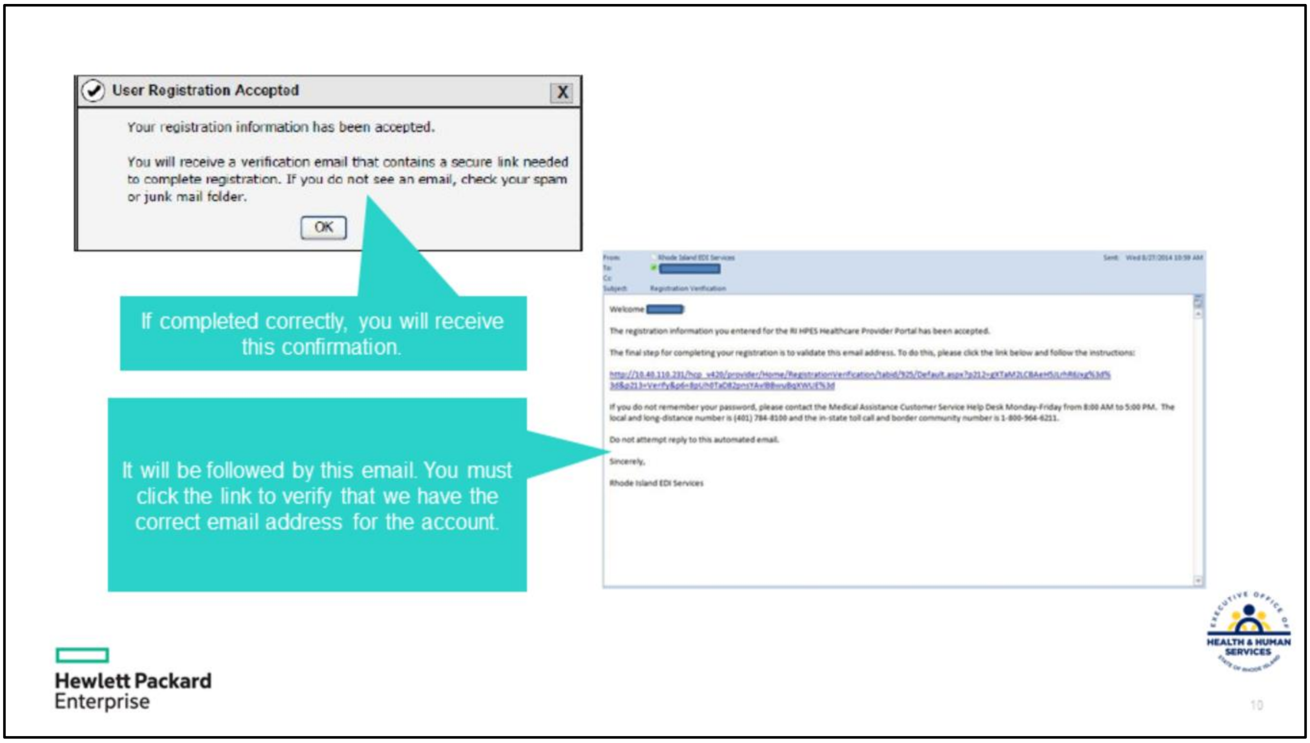
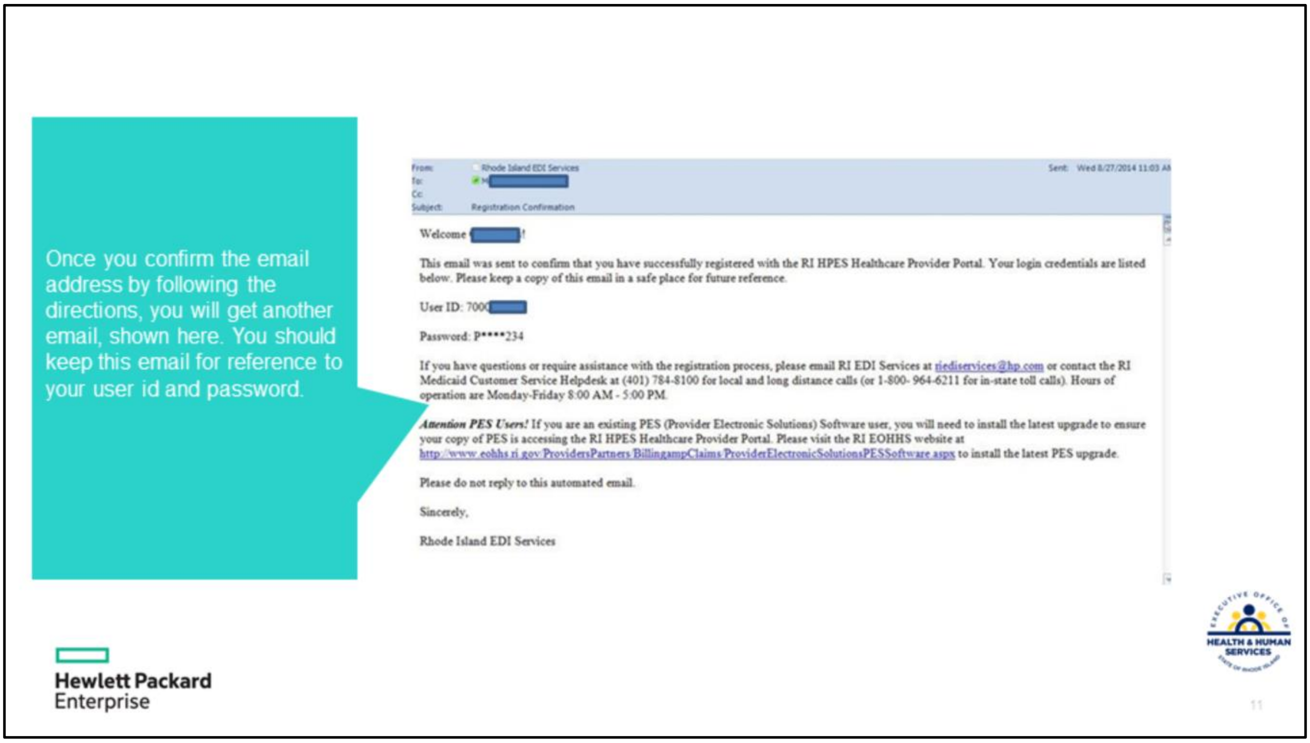
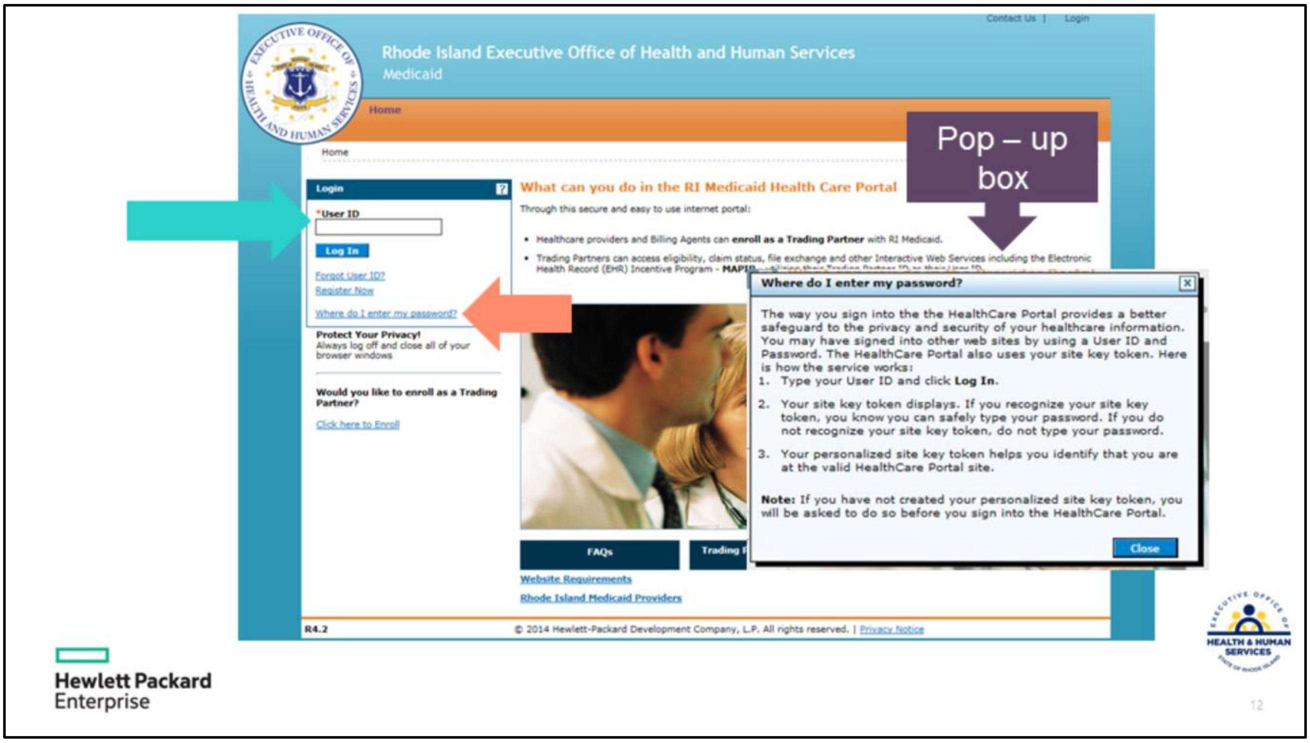
- Select two different challenge questions and enter the answers.
- Read the user agreement and enter your name as an electronic signature. The Provider ID (most cases NPI) will be prepopulated.
- For billing agents, there will be no provider ID listed.
- When completed, the submit button will be enabled and you click it to continue.



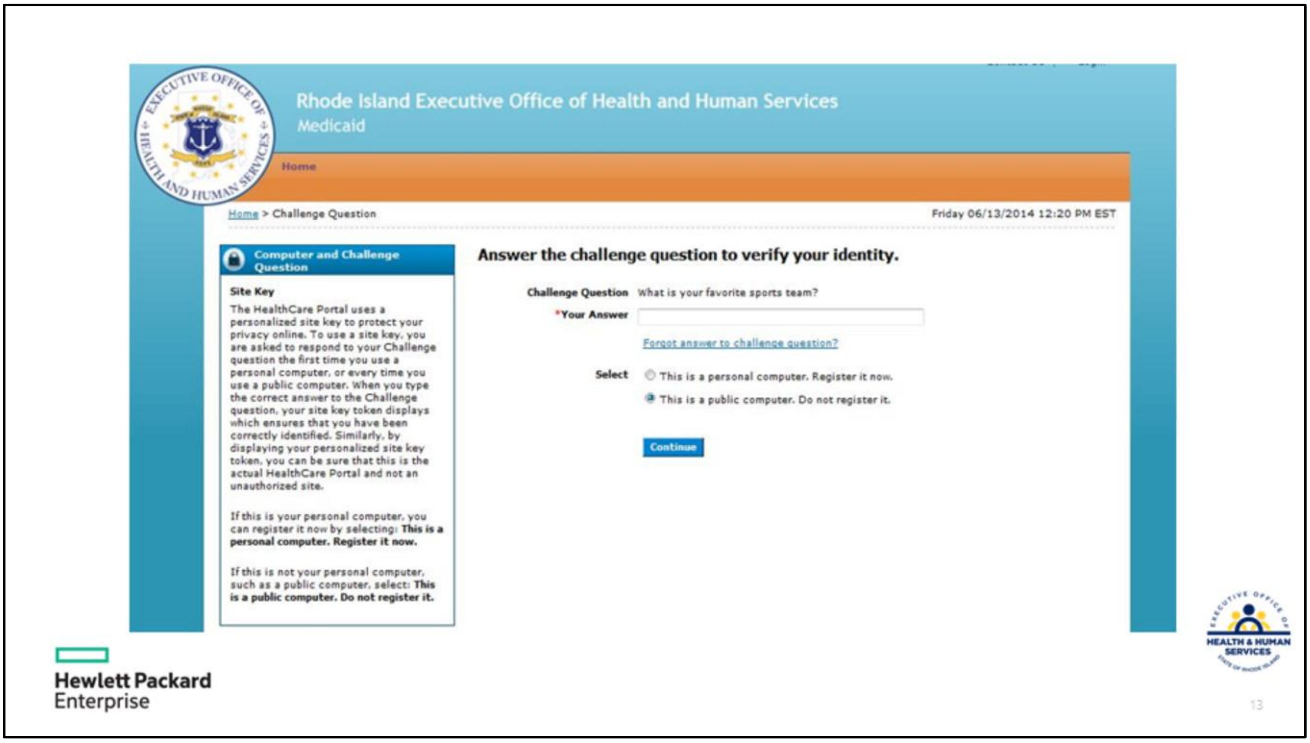
- If completed correctly, you will receive this confirmation in a pop up box.
- It will be followed by this email. **Click the link to follow the verification instructions**.
- This ensures that we have the correct email address for contact information. **Your registration is not complete** until you verify your email address.



Once you confirm the email address by following the directions, you will get another email, shown above. You should keep this email for reference to your user id and password.



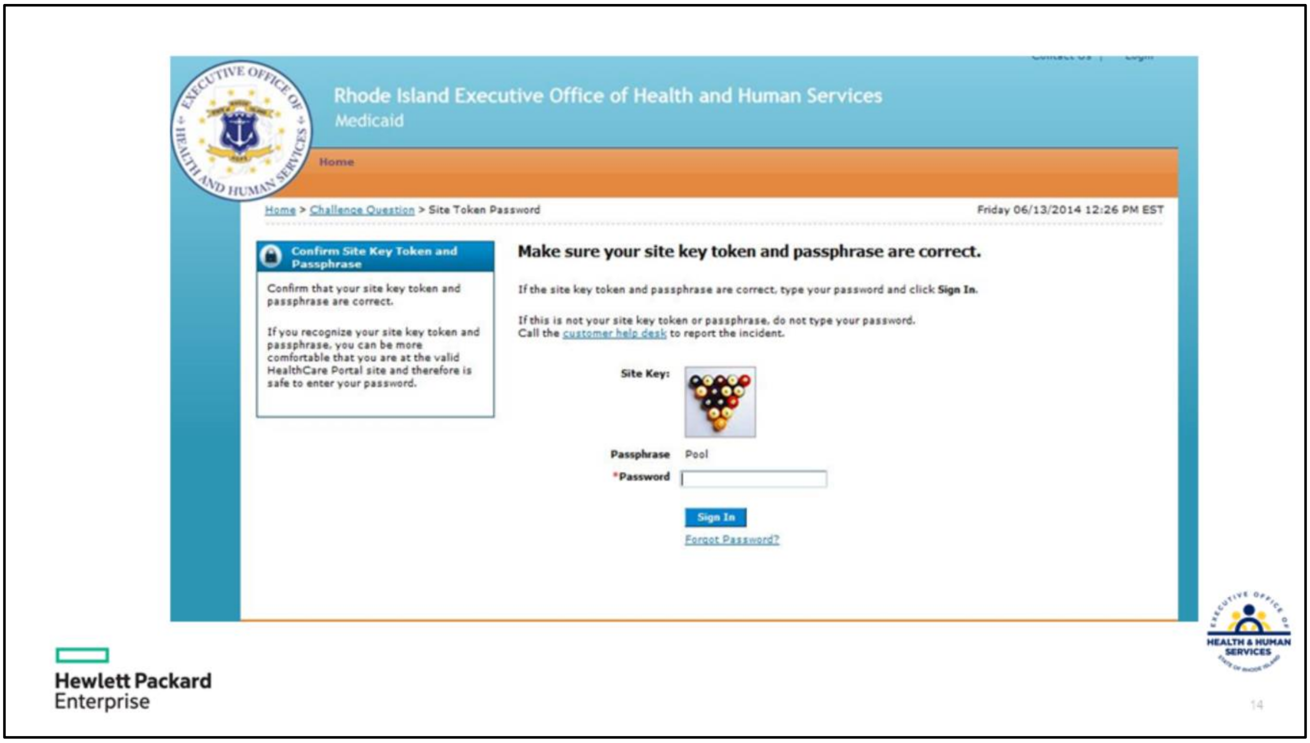
- Once registration is complete, return to the Portal home page and log in, entering the user ID and hitting **Log In**.
- Your password is entered on another screen.
- This pop up box tells you that your password will be entered on another screen.



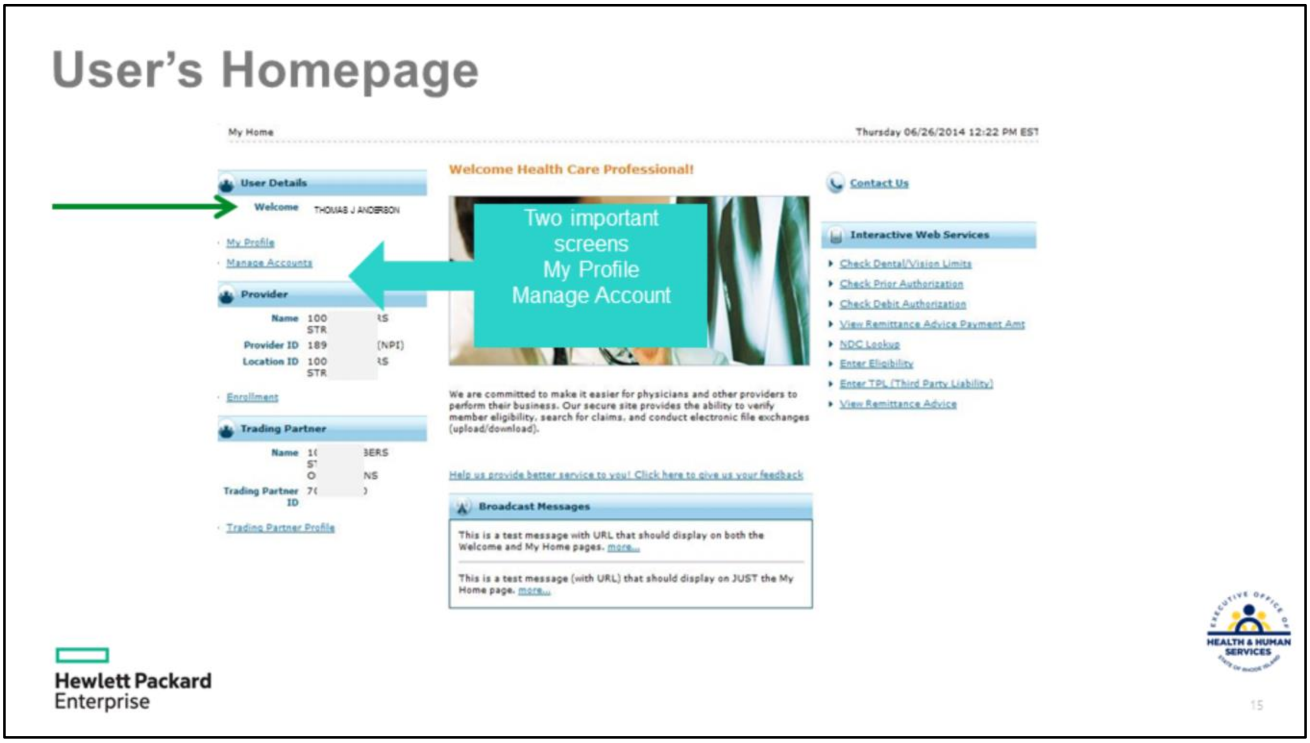
- You will be brought to a security page.
- After answering the security question correctly you can choose to register your computer.
    - If you are on a private computer you will always use to access the portal, you can select Register it now. If you do, you will be brought to the password page in the future, without answering a security question.
    - If you are on a public computer , do not register it. You will be given a challenge question first when you log in.

Reminder:

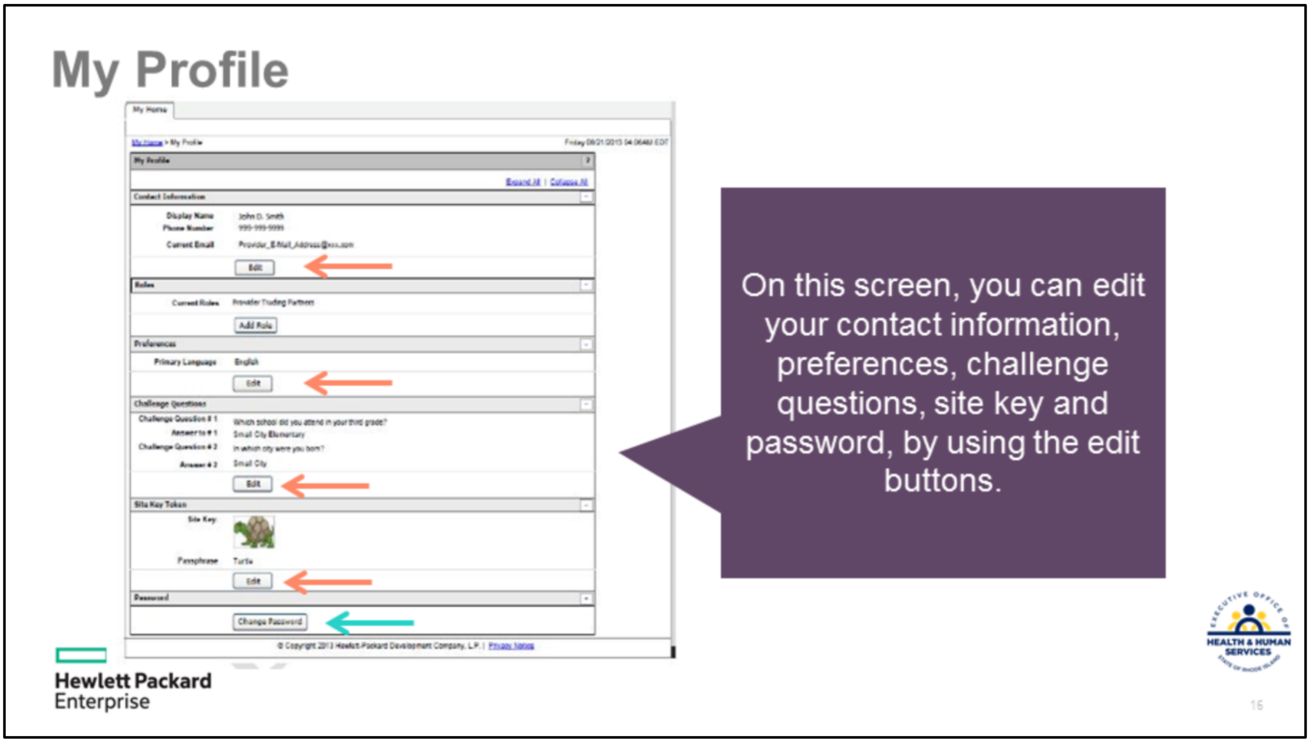
- If you are on the office computer that will often be used, you will select the first option to register the computer.
- If you are on a public computer that others may use, and you want the challenge question to be asked each time, you should click the second option - *This is a public computer. Do not register it.*



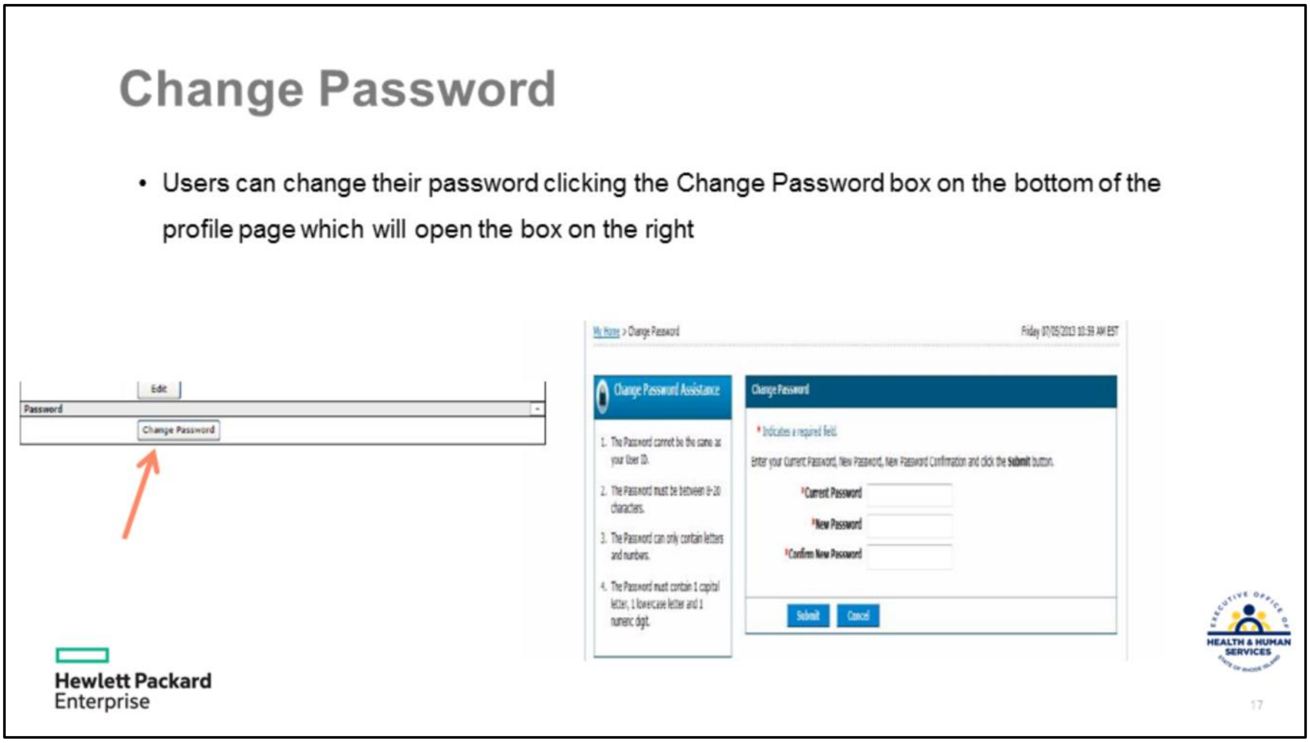
- When you are brought to the password page, you should first identify that it is site key and passphrase that you selected during registration.
- If they are both correct, enter the **password** and click the Sign In button.
- If you forgot your password, you can click the *Forgot Password* link.



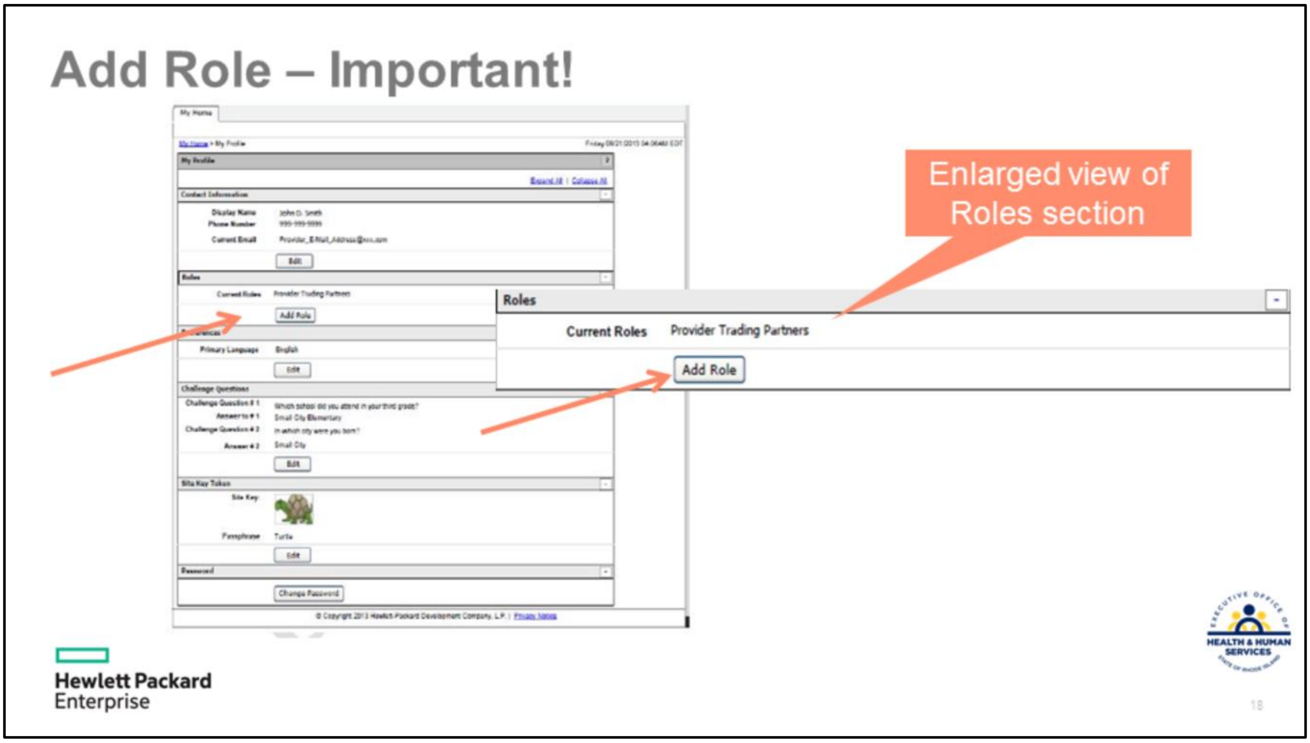
- After entering your password, you will be brought to the **User's Home Page.** *Some information has been obscured for privacy.*
- You will note the welcome message.(green arrow) Notice in this example it says Welcome Thomas J Anderson. That name was what the user selected as the *Display Name* part of the security information.
- You can access important screens from your home page: My Profile, Manage Accounts, and Trading Partner profile.
- You will have the ability to update your own account information (contact, challenge questions, site key, token, password).



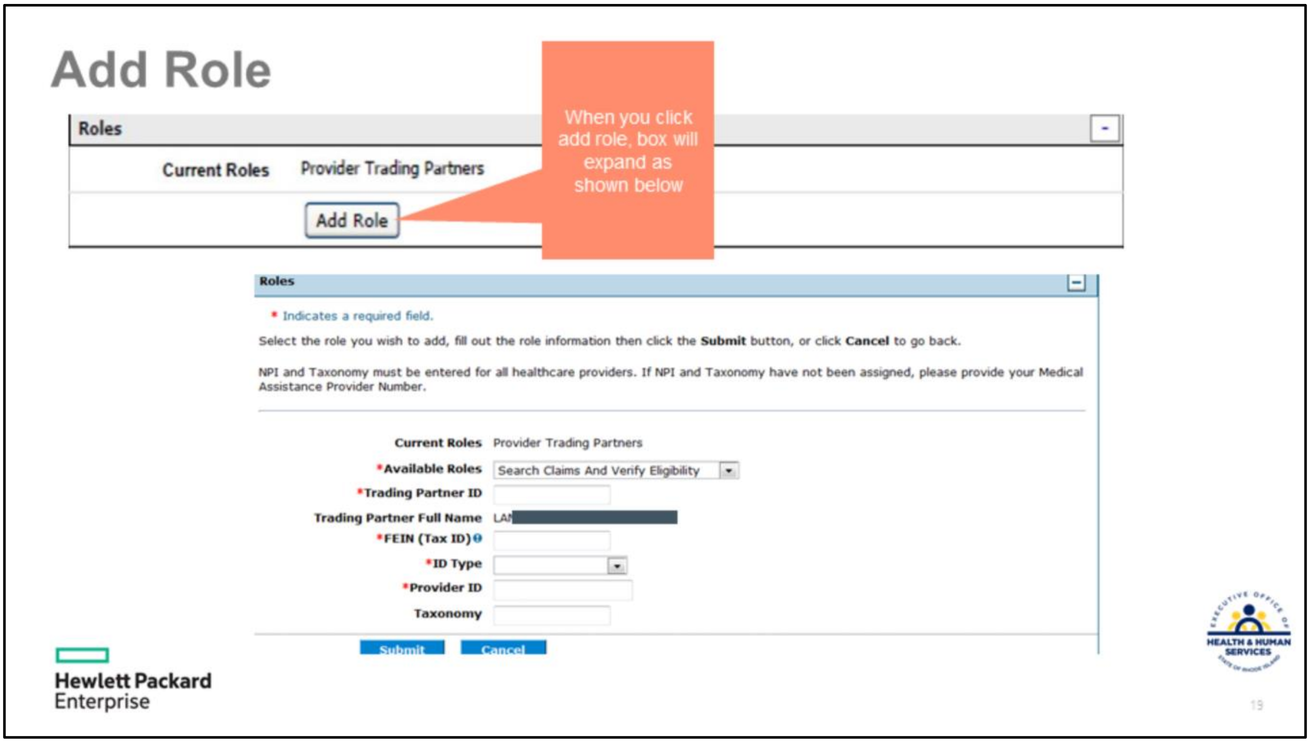
- By selecting My Profile, you will be brought to this screen.
- On this screen you can edit your contact information, preferences, challenge questions, and site key token by using the edit buttons- see orange arrows
- You can also change your password using the Change Password box on the bottom green arrow



- To change your password, you will need to enter your current password first
- Then enter your new password
- Important note: your password may only be changed once in one day, and you cannot choose a password that was one of your last 6 passwords.



- One other very important function on this page is the **Add Role** function.
- This is **critical to be able to search claims and eligibility**.
- Click on the Add Role box. (shown in the enlarged section)

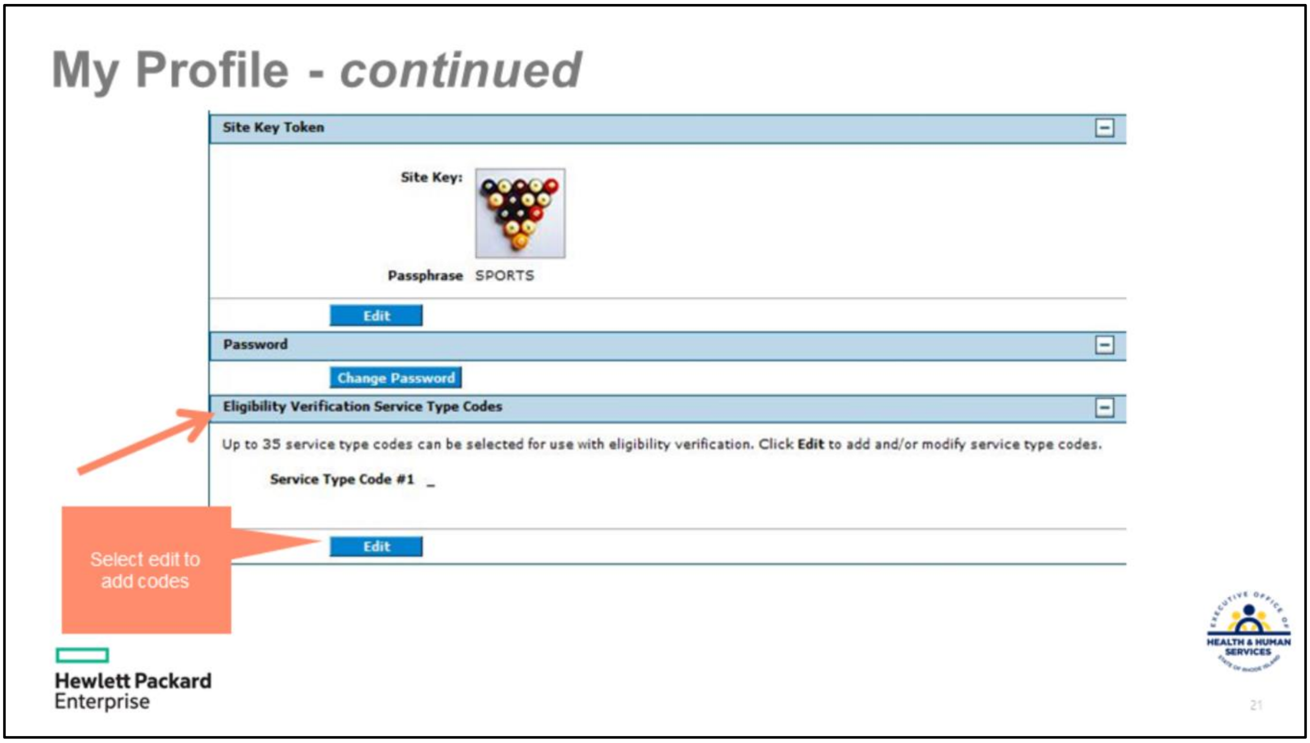


- This function, **Add Role**, is how you add the function to search claims and verify eligibility
- For you to be able to search claims and verify eligibility, you **must** add that role, using the ID number of an associated provider.

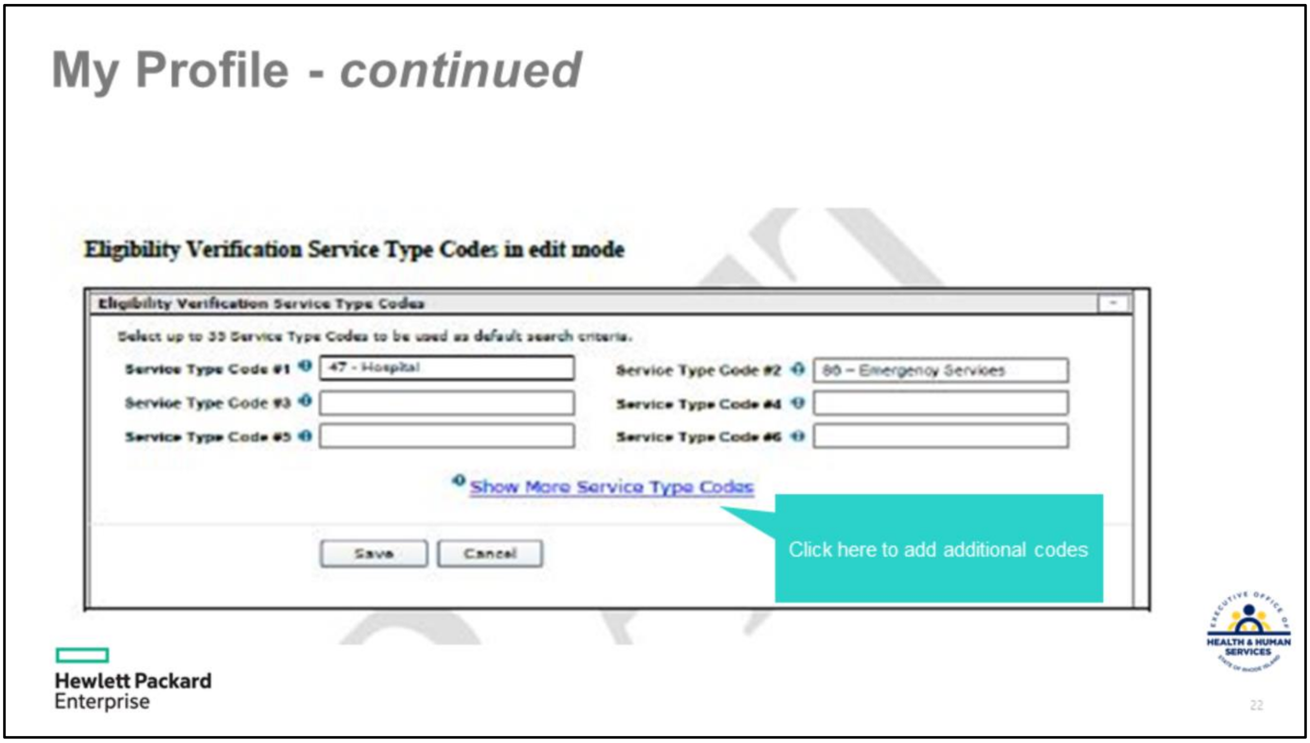
Ex. Dr Jones enrolls as a new trading partner. His office manager then registers the Trading Partner number to use the portal. In order to search claims or verify eligibility, the office manager must now add the search claims and eligibility role here by entering the Trading Partner ID and then the Trading Partner's tax ID, Dr Jones NPI.

- To add this role, click Add role in the Role section shown here with blue arrow. By clicking the Add Role button, the Role panel will be displayed.
- The Search Claims and Verify Eligibility role will be in the ***Available Roles*** box.
- Enter the Trading Partner ID, Trading Partner name and the tax ID (FEIN)
- Then enter the ID type (NPI or Medicaid ID for atypical providers) and the Provider ID number (taxonomy is optional)
- Click the submit button.

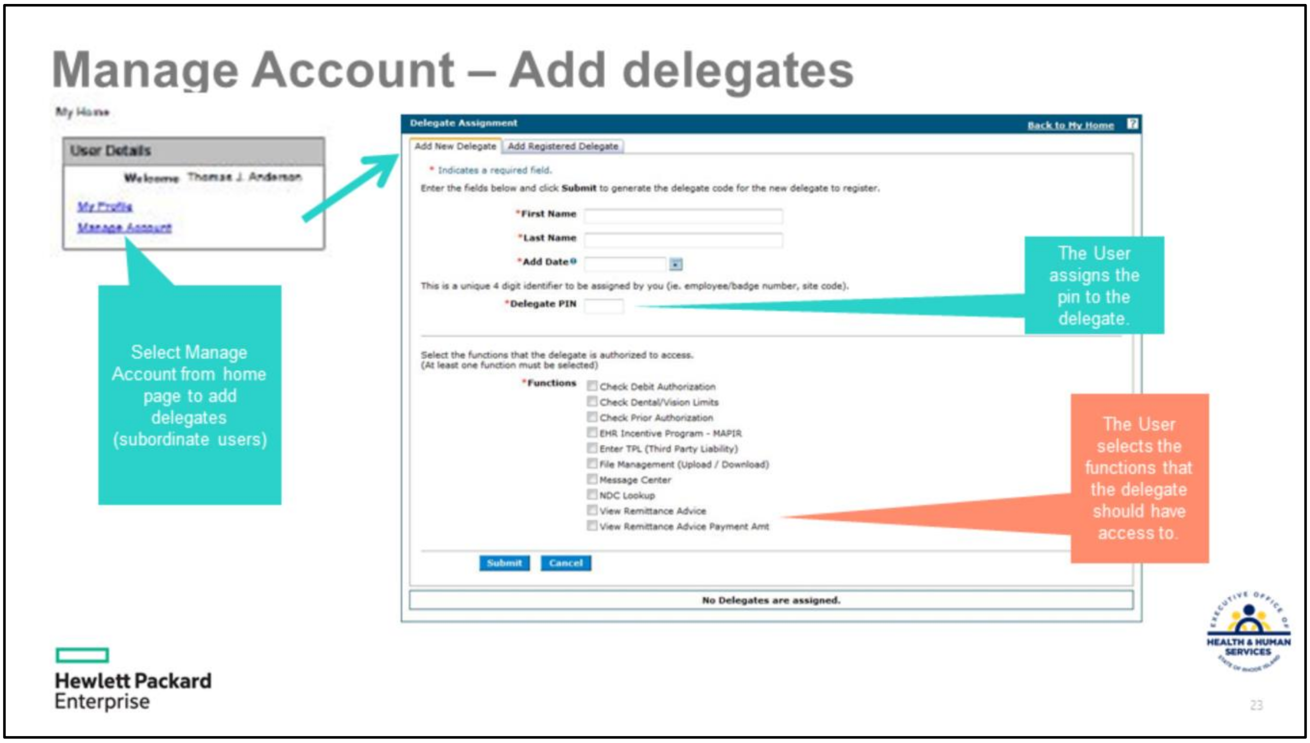
- After hitting submit – this will appear. (this image is just a portion of the profile page, enlarged so you can see the role has been added.)
- The original notation "Provider Trading Partners" will be followed by "Search Claims and Verify Eligibility"
- For Billing Agents, "Provider Billing Agent" will be followed by "Search Claims and Verify Eligibility"



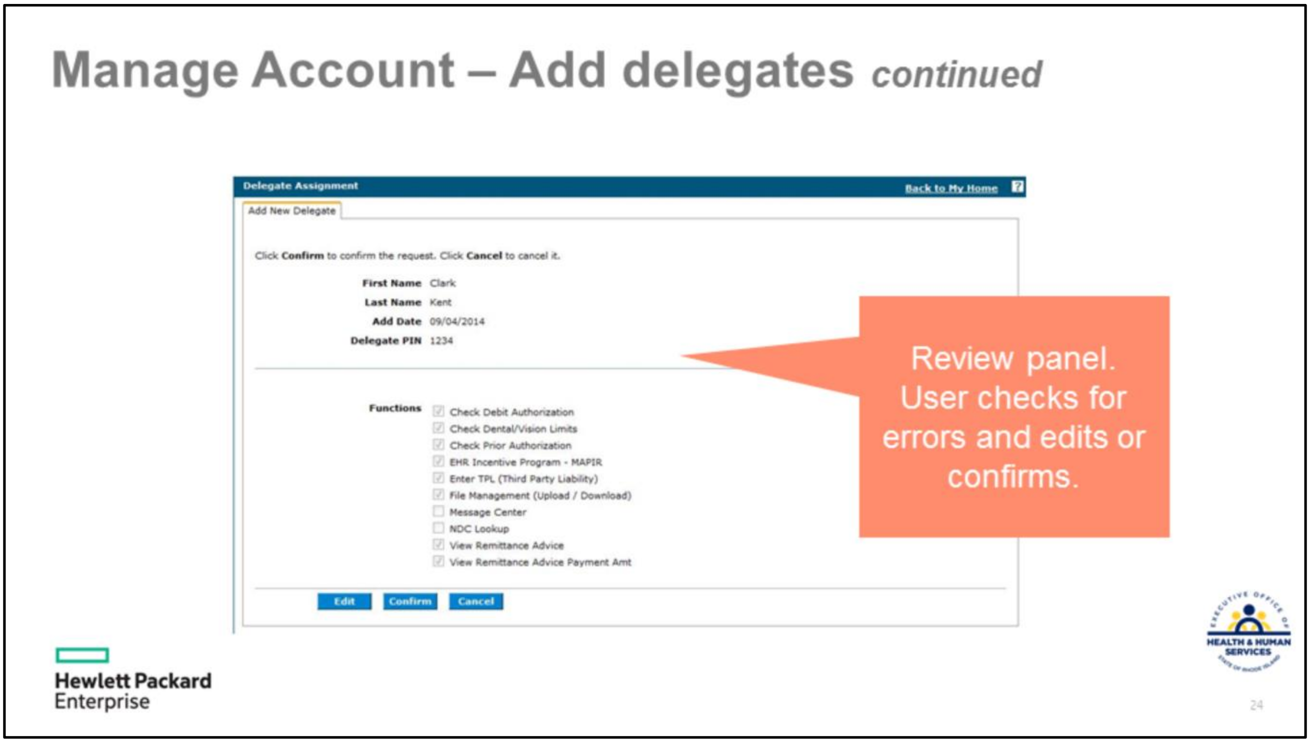
- Also at the bottom of My Profile page, you may select from 35 eligibility verification Service Type Codes to customize your eligibility searches.
- Select the edit button to add the codes.



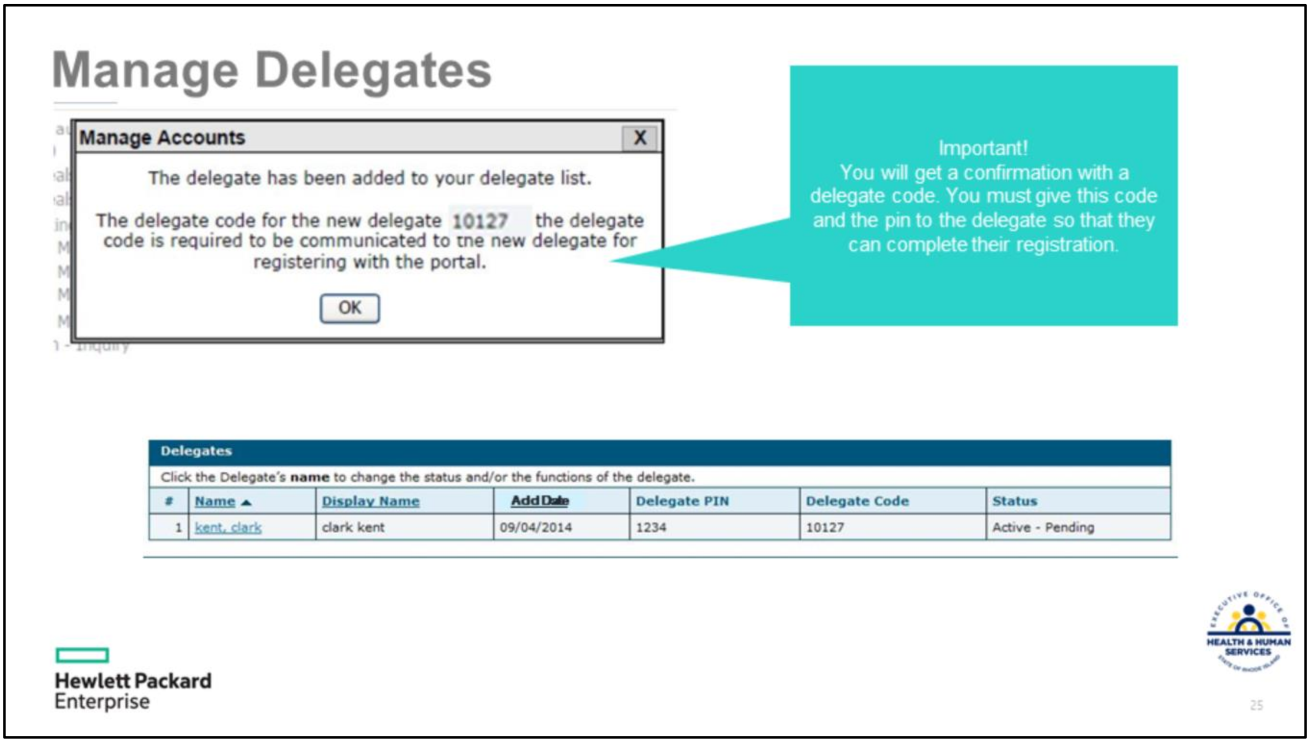
- Up to 6 entries can be made on your screen.
- Select the service types you want to use when searching for eligibility. These codes will narrow the information returned to the information you are seeking.
- To enter more, select Show More Service Type Codes to add more.
- Codes entered here will apply to all of your eligibility verification searches.



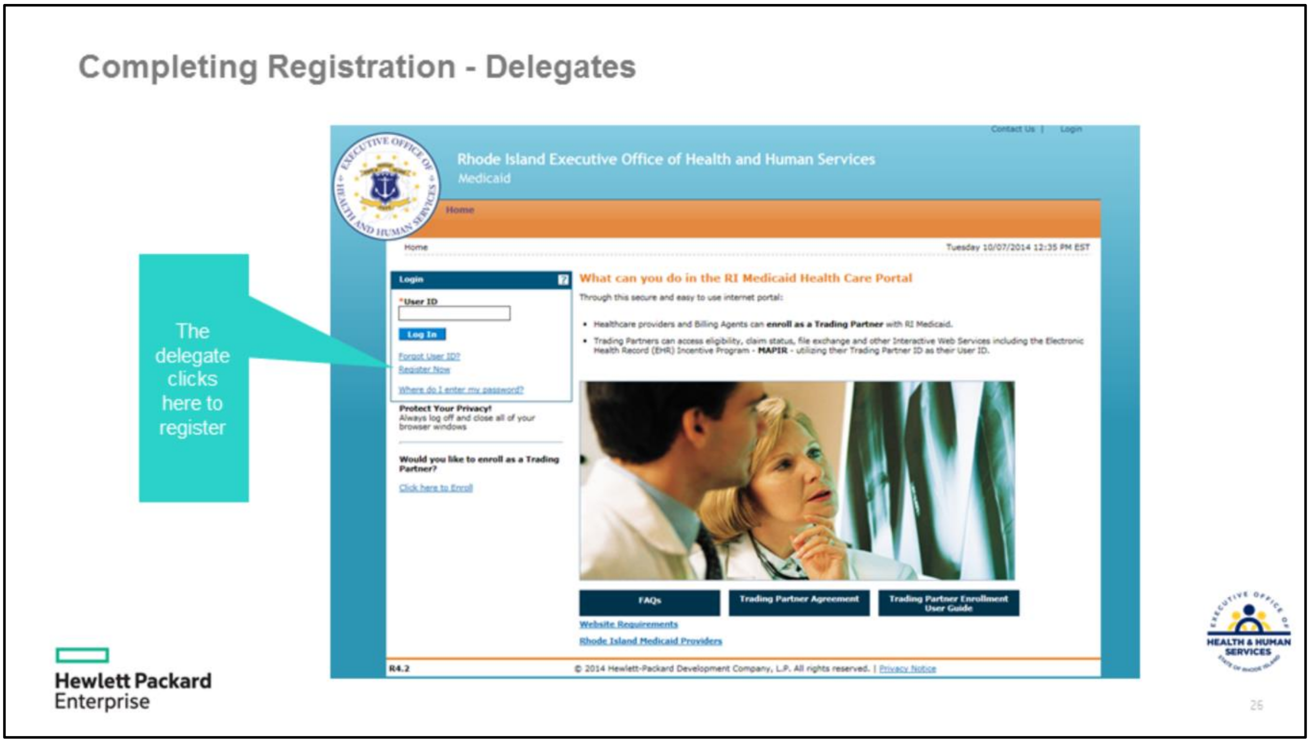
- To manage your account, return to the **User Home Page** and select **Manage Account**. (shown with the blue arrow)
- You will need to add delegate users (previously called subordinate users) who work on your behalf – to your account.
- **It is a two step process**.
- **Step one**: Select the **Add New Delegate** tab.
- Enter their first and last name and date you are adding them.
- Assign them a four digit pin number. (make a note of this)
- Then select the functions that you want them to be able to access
- To complete, click submit.



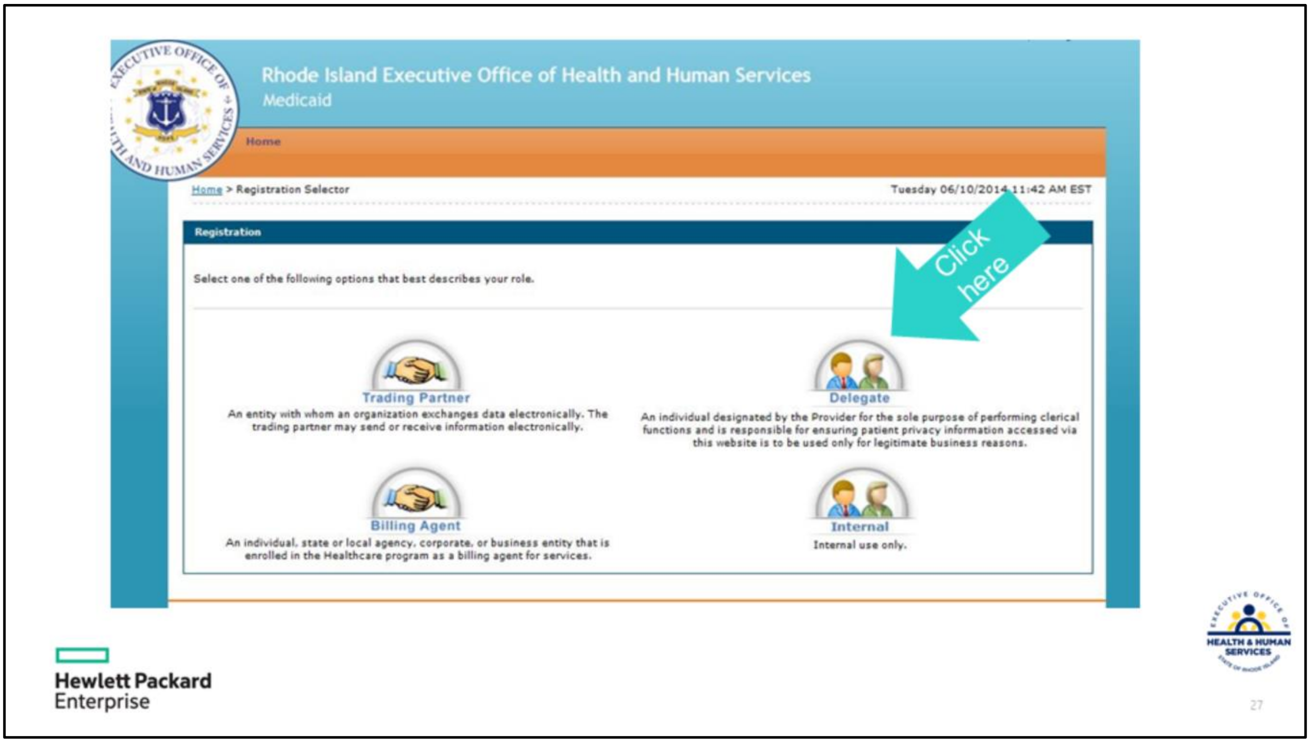
- The information will come back to you for review/edit.
- It will show the delegate being added, the pin number and the functions you selected.
- You can edit, confirms or cancel the information.



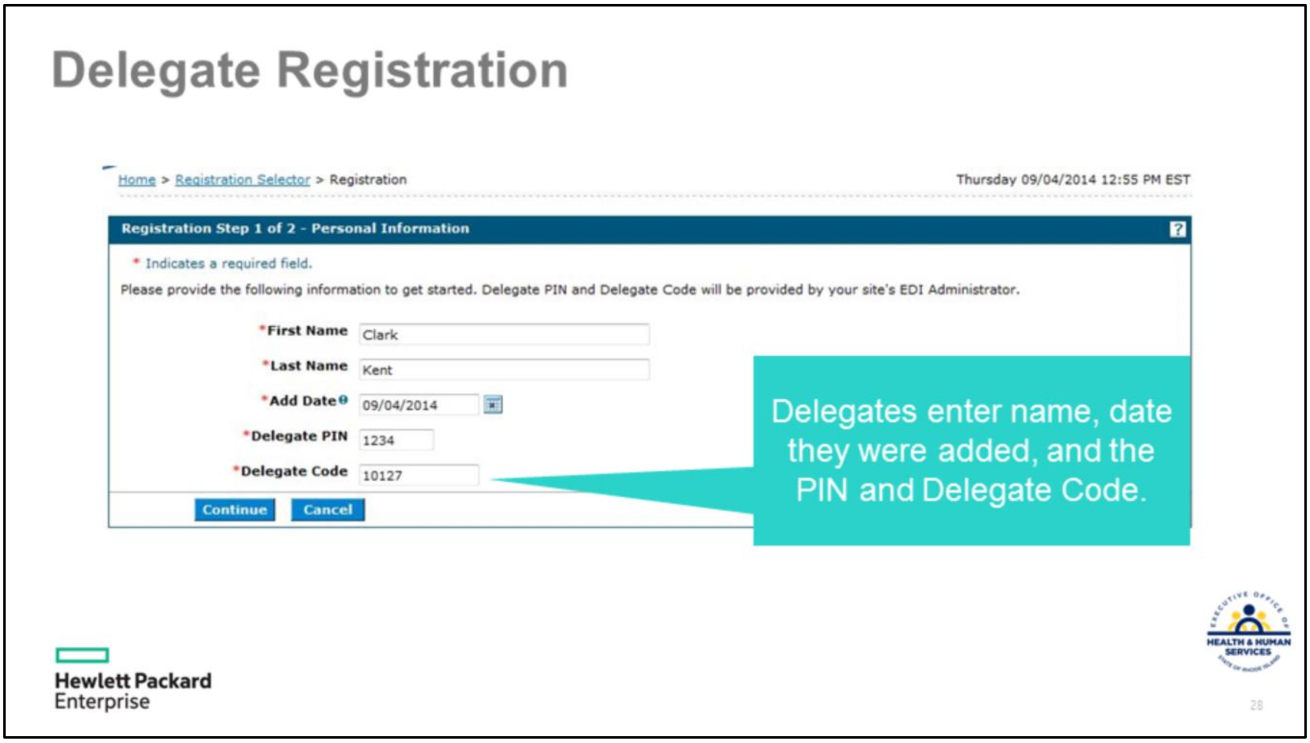
- When you complete the process correctly, you will get this confirmation pop up box with a delegate code, shown by arrow. Make a note of this code.
- You will need to give the delegate **both the pin and the code to register themselves**.
- You will also need to tell them the date that you added them. They will need this to register.
- The delegate will be added to your delegate list shown above.
- The delegate then goes back to the homepage, and registers in the same way that the Trading Partner did. (this will be explained on next few slides)



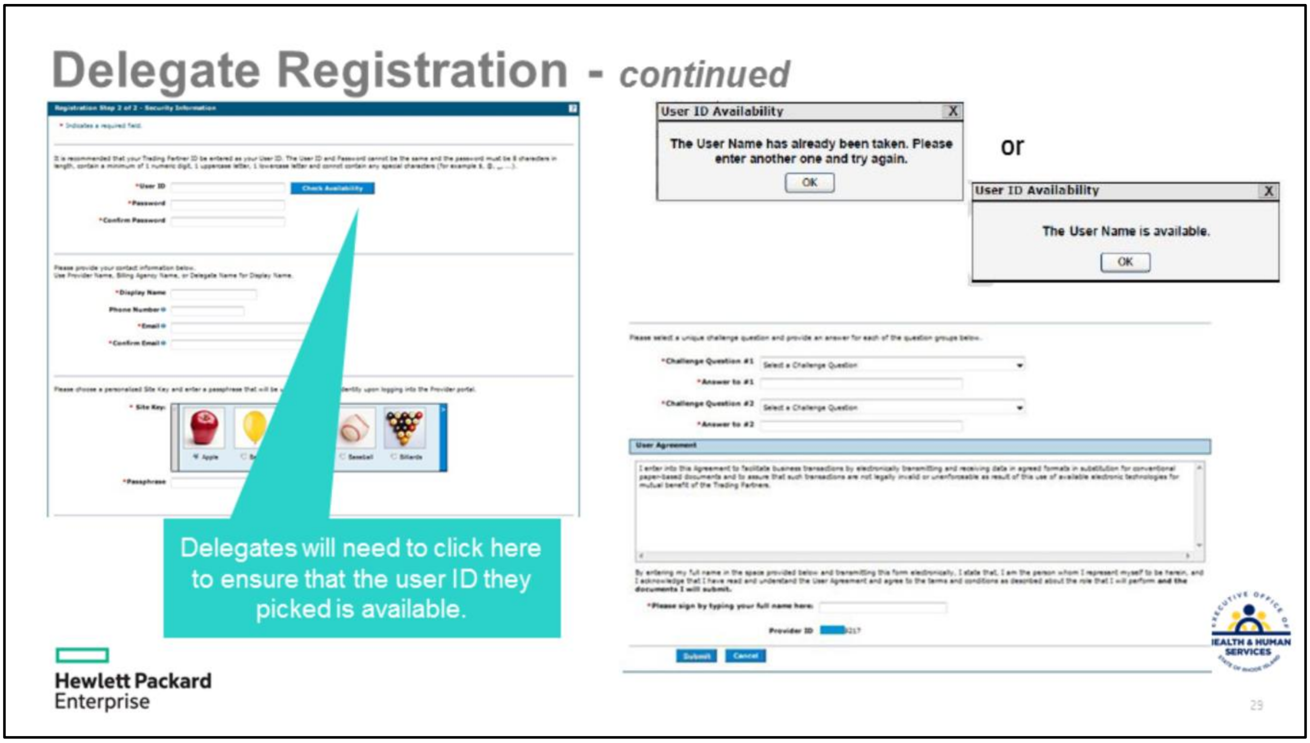
- Once a delegate user receives their PIN and Delegate code, they must complete their registration.
- Delegates should go to the home page and click **Register Now**



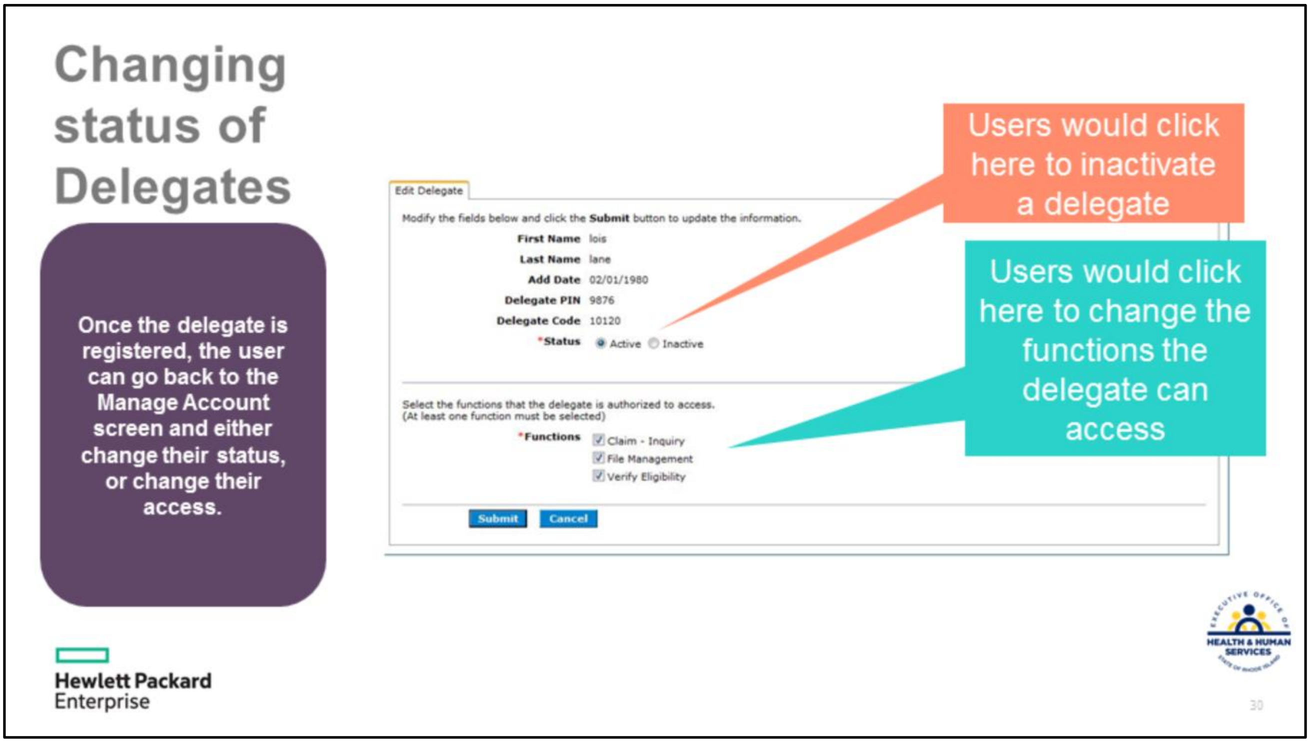
On the registration selector page, click **Delegate**



Delegates will be brought to this screen.
Enter all of the information **INCLUDING the pin and code** that was given by the administrator.
They will use the date that the administrator added them.
When completed, click continue.

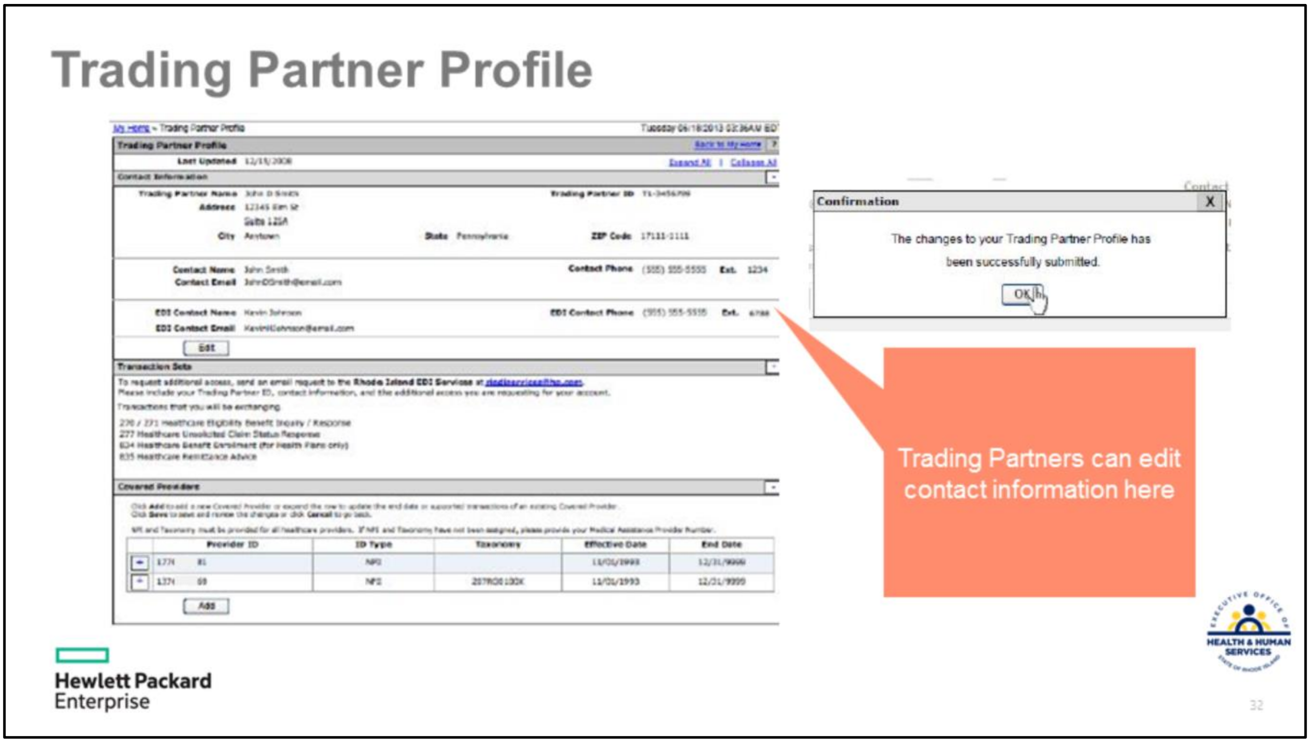


- This will bring delegates to the security page where they will select user name, password, site key, passphrase and security questions.
- When delegates select their user name, they should check availability by clicking the **Check Availability** box.
- The pop up box will show if the name is available or not. (see two boxes on top right)
- Once they complete all of the information and click submit, they will get the confirmation to validate their email address and registration will be complete.
- **Important Note: Each delegate must have a unique user name, and not a shared name with other delegates. If the delegate needs to reset their password, they need to use the "forgot password" link.**

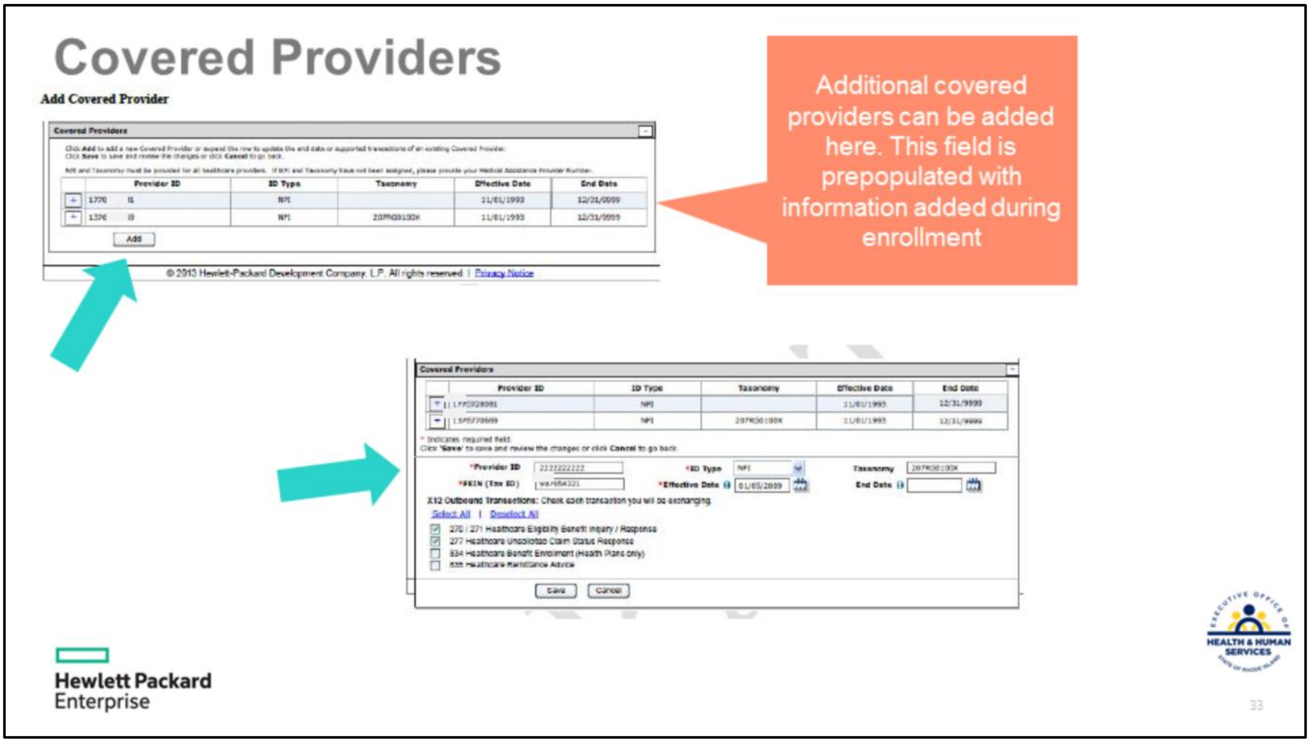


- Once the delegate is registered, the Trading Partner is able to change their status in the Manage Account area, if needed.
- The Authorized user can change the status from active to inactive and change which functions the delegate can access. Delegates who leave their employment should be changed to inactive immediately.

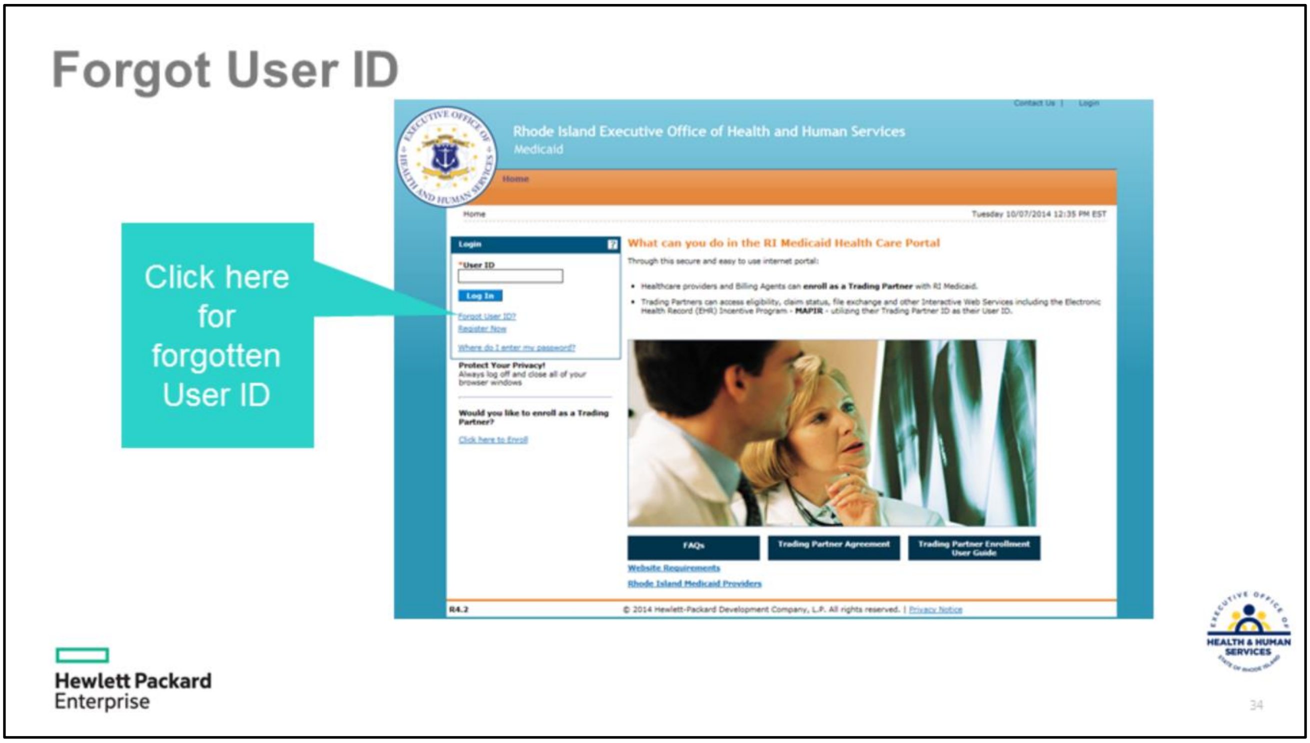
- The authorized user for the Trading Partner Account will also manage the account profile.
- From the User home page, click on **Trading Partner Profile**
- This page will allow the authorized user to update the contact information.
- Trading Partner account holders who support multiple providers under one NPI will have the ability to associate additional providers to their account through the add covered providers function.



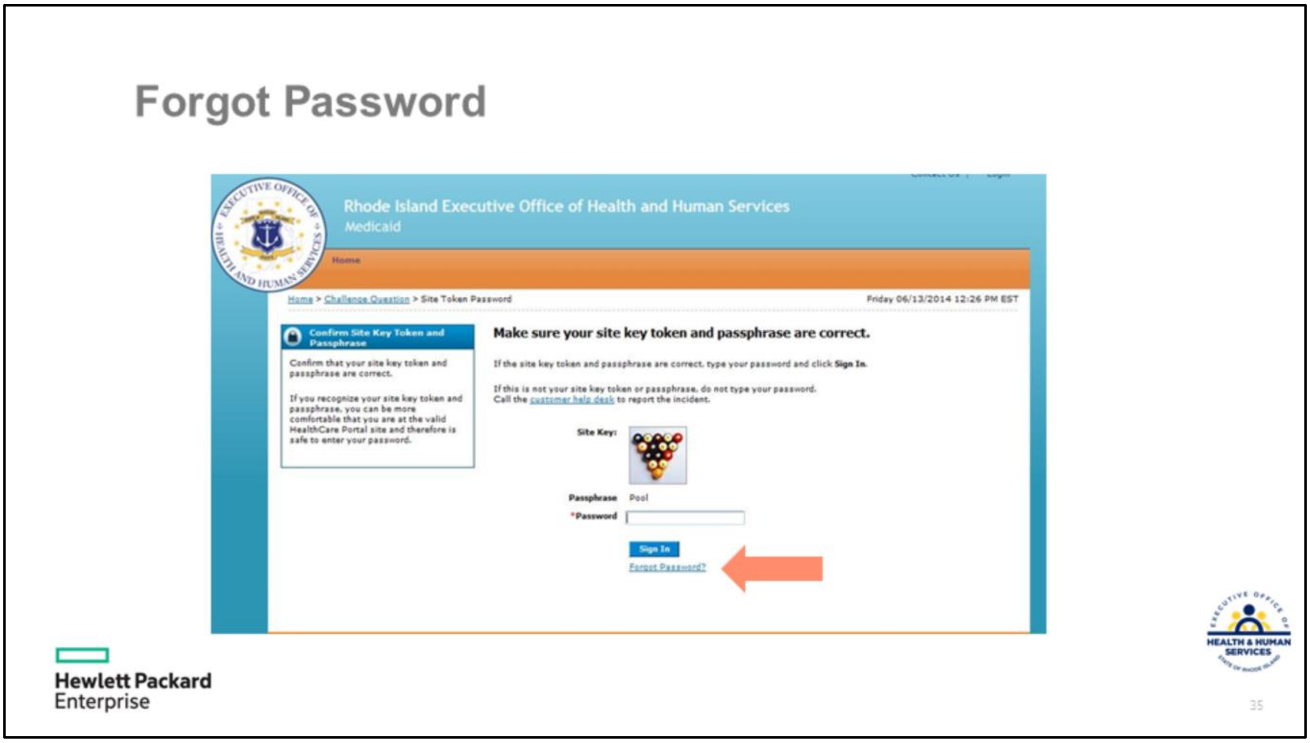
- This screen is where Trading Partner will verify information and make necessary changes.
- It lists contact information on the top, transaction sets, and covered providers that were set up on enrollment.
- For existing Trading Partners, who were using IWS and are registering to use the Healthcare Portal, this will be prepopulated with the information that was already associated to their Trading Partner ID.
- For new trading partners you entered this information when you enrolled.
- To change information, click edit, make changes and then click save.
- If changes were accepted they get the confirmation shown on the right.



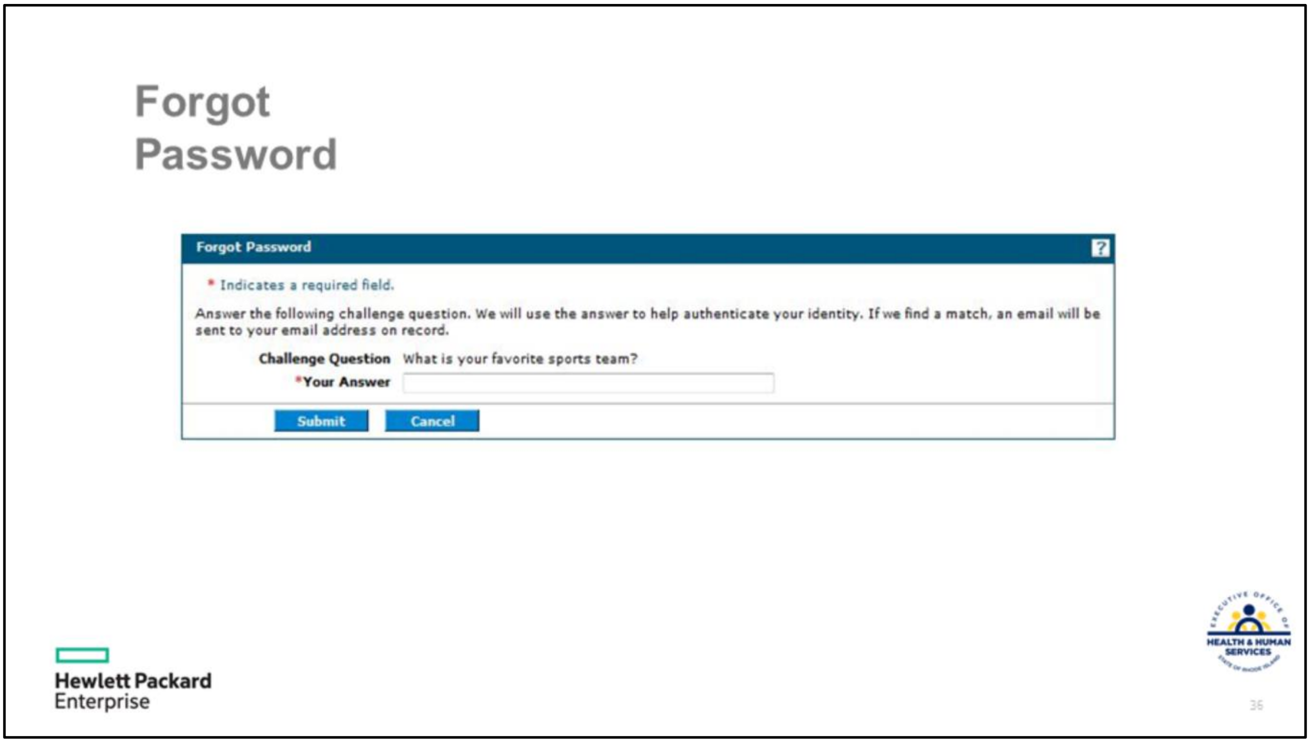
- A covered provider is any provider that belongs to your office, facility, or is part of your group under that Trading Partner number.
- For existing Trading Partners who have previously used IWS and are now registering in the portal, this information will be prepopulated for you.
- For new Trading Partners, the information listed when you enrolled will be prepopulated here.
- But, if you need to add another covered provider you would click add. (see the first image)
- Enter all the information and click save. (see the second image)
- Special Note for those providers using an outside company for billing: If at some point you change billing companies, you will need to instruct your original billing agent to remove the 835 electronic admittance advice and the 277 Unsolicited transaction associated to your account, before your new company can add them. These transactions can only be associated to one entity.



If you should forget your user ID, select **Forgot User ID** from home page and follow the instructions on the next screens to retrieve your user ID.



- If you forget your password, you can receive a temporary one.
- After entering your User ID and selecting “log in” you will be brought to the password page.
- From the page asking for password, click **Forgot Password**



- You will be asked one of your challenge questions.
- If you answer correctly, a temporary password will be sent by email.
- When you log in with the temporary password, you will be asked to change it to a password of your choice.
- Important note: You can only change password once daily, and you can select a password that was one of your last 6 passwords.

Questions?

For questions, contact the
Customer Service Help Desk
Available Monday – Friday 8:00 AM – 5:00 PM
(401) 784-8100
For local and long distance calls
(800) 964-6211
For in-state toll calls

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