

Provider Portal Admin User

Introduction

Purpose

The purpose of this module is to review the Provider Portal Administrator (Admin) role and provide an overview of the Provider Portal website.

Module Objectives

- How to register an organization.
- Options to access the Provider Portal website.
- Provide a walk-thru of the Provider Portal website and its functions.
- Examine the Provider Portal tiles.
- Review valuable references on the Provider Portal website.
- Demonstrate registering a user.
- Submitter Admin requests Provider affiliation.
- Review various Admin functions.

Acronyms

A list of current acronyms is located in the *Appendix* section of each complete workbook.

Provider Portal Overview

The Provider Portal houses communications, notifications and organization information for Medi-Cal providers and provider healthcare staff. It focuses on reducing paper communication between DHCS and provider communities, increasing the security and accessibility of Medi-Cal electronic services and empowering providers in managing their organization to support their billing needs.

Highlights

- Ability to manage user and user access.
- Reduce physical mail volume.
- Enable organizational single sign-on.
- Electronic record of notifications such as access requests and new correspondence.
- Self-service capabilities such as resetting user's Personal Identification Number (PIN).

Registering an Organization

Note: This is the first step in setting up the Provider Portal for the organization and should be completed by one trusted individual. This person will automatically be given the role of Organization Administrator (Org Admin) in the Provider Portal, including permissions for all National Provider Identifiers (NPIs) and correspondence. All other users will be created by an existing Org Admin. If the organization has already been set up, continue to the “How to Register” section of this module.

When registering an organization, the Department of Health Care Services (DHCS) will issue a one-time registration token directly to the designated provider organization. This token will be sent by letter to the pay-to address on file with Medi-Cal and it **must be used within 30 days of the date issued or it expires**. Once the Org Admin has been identified and has received the token, the steps below should be followed:

1. Navigate to the Provider Portal Log In screen at: <https://provider-portal.apps.prd.cammis.medi-cal.ca.gov/login>. Enter email address then select the **Join Medi-Cal Provider Portal**.

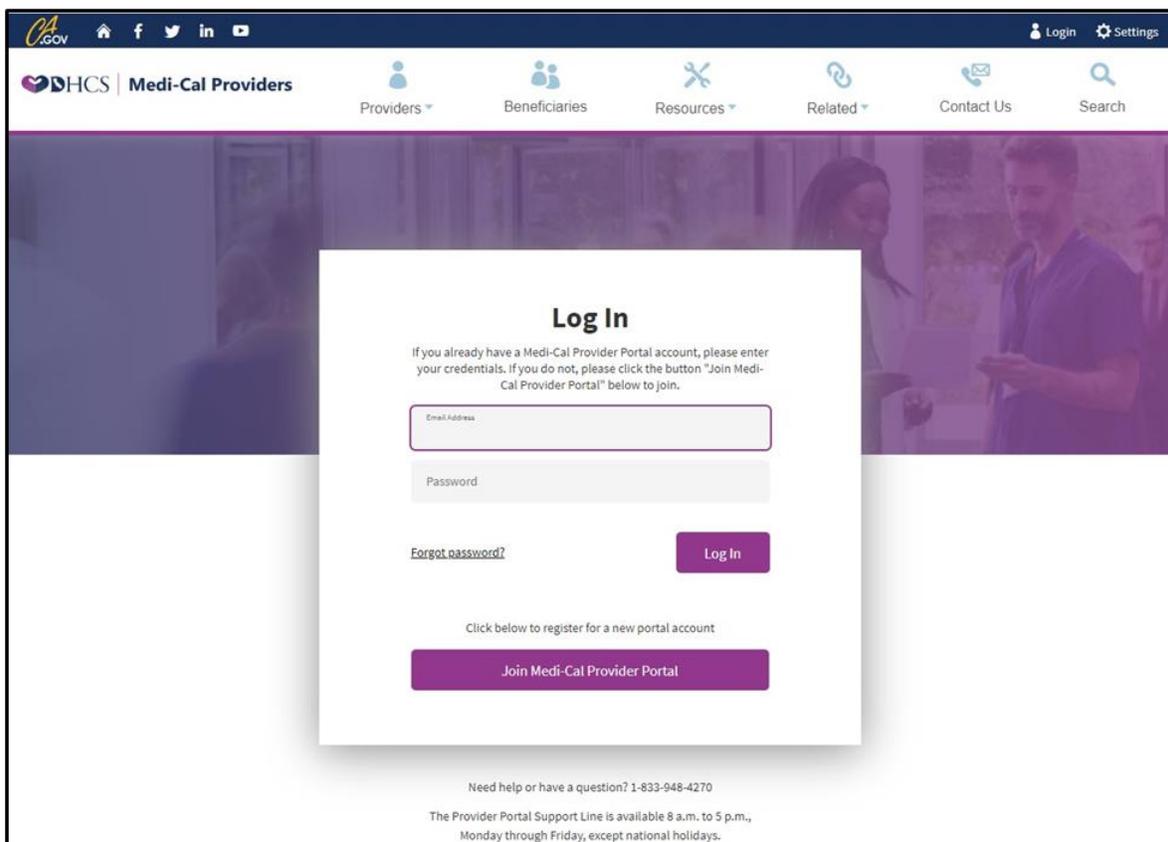
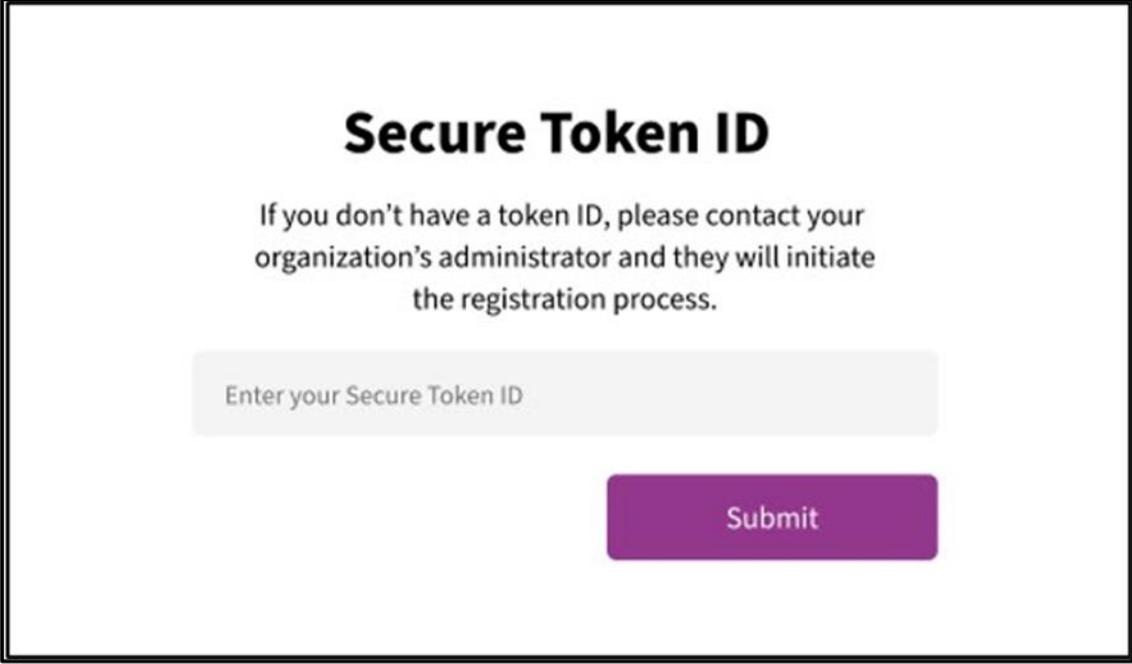


Figure 1.1: The Provider Portal Log In screen.

2. The Secure Token ID pop-up window appears. Enter the token provided and select **Submit**.

The image shows a pop-up window titled "Secure Token ID". The title is in a large, bold, black font. Below the title, there is a paragraph of text: "If you don't have a token ID, please contact your organization's administrator and they will initiate the registration process." Below this text is a light gray rectangular input field with the placeholder text "Enter your Secure Token ID". To the right of the input field is a purple rectangular button with the word "Submit" in white text.

Secure Token ID

If you don't have a token ID, please contact your organization's administrator and they will initiate the registration process.

Enter your Secure Token ID

Submit

Figure 1.2: Secure Token ID screen.

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3. A **Terms and Conditions for Medi-Cal Provider Portal** window displays. Check the “I confirm I have read and agree to the above” box and select **Next**.

Terms and Conditions for Medi-Cal Portal

Welcome to the Medi-Cal Provider Portal. Please read and agree to the Terms and Conditions to proceed to the portal.

WARNING: This computer system is for official use by authorized users and may be monitored and/or restricted at any time. Confidential information may not be accessed or used without authorization. Unauthorized or improper use of this system may result in administrative discipline, civil and/or criminal penalties. By using this system, you are acknowledging and consenting to these terms and conditions.

LOG OFF IMMEDIATELY if you are not an authorized user or do not agree to the conditions in this warning.

I confirm that I have read and agree to the above

I confirm that I am authorized to create a Medi-Cal Provider Portal account of behalf of my organization.

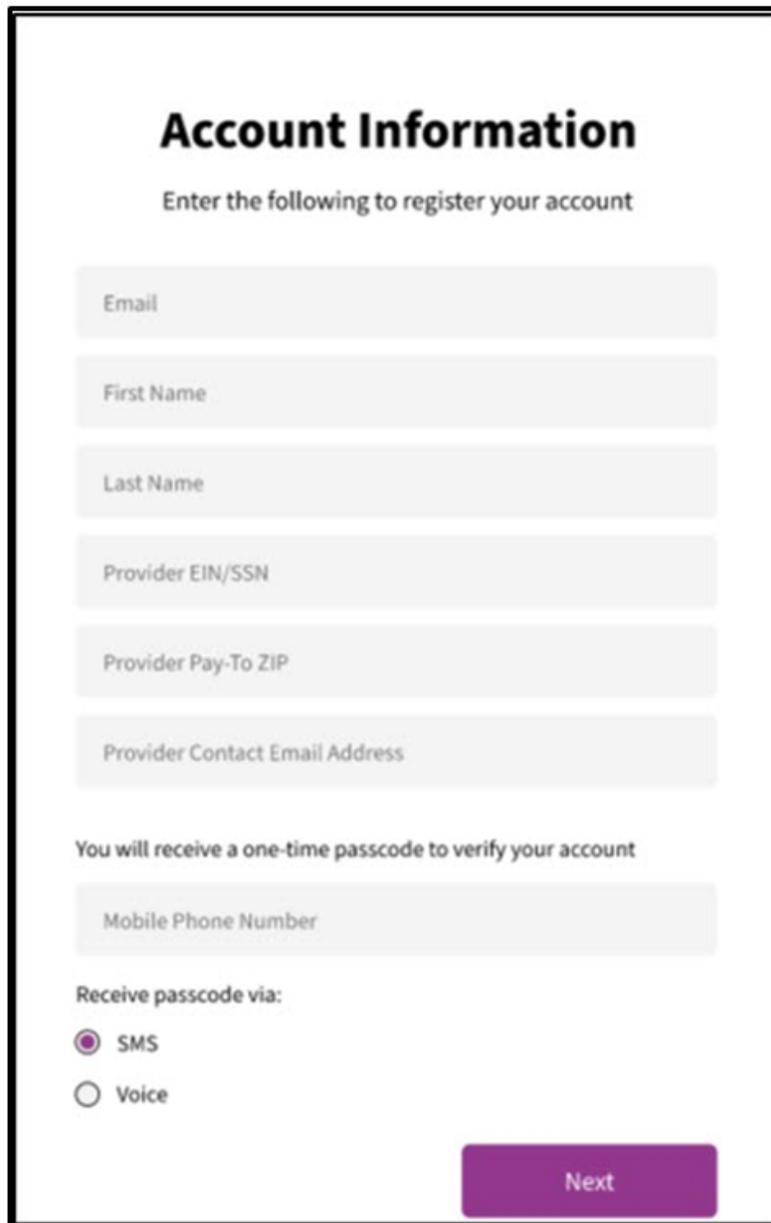
[Next](#)

Figure 1.3: Terms and Conditions for Medi-Cal Provider Portal screen.

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4. The **Account Information** window appears. Enter an Email, First Name, Last Name, Provider Employer Identification Number (EIN) or Social Security Number (SSN), Provider Pay-To ZIP and Provider Contact Email Address. To receive one-time passcode (OTP) enter mobile phone number to receive a passcode via Short Message Service (SMS) or Voice and select **Next**.



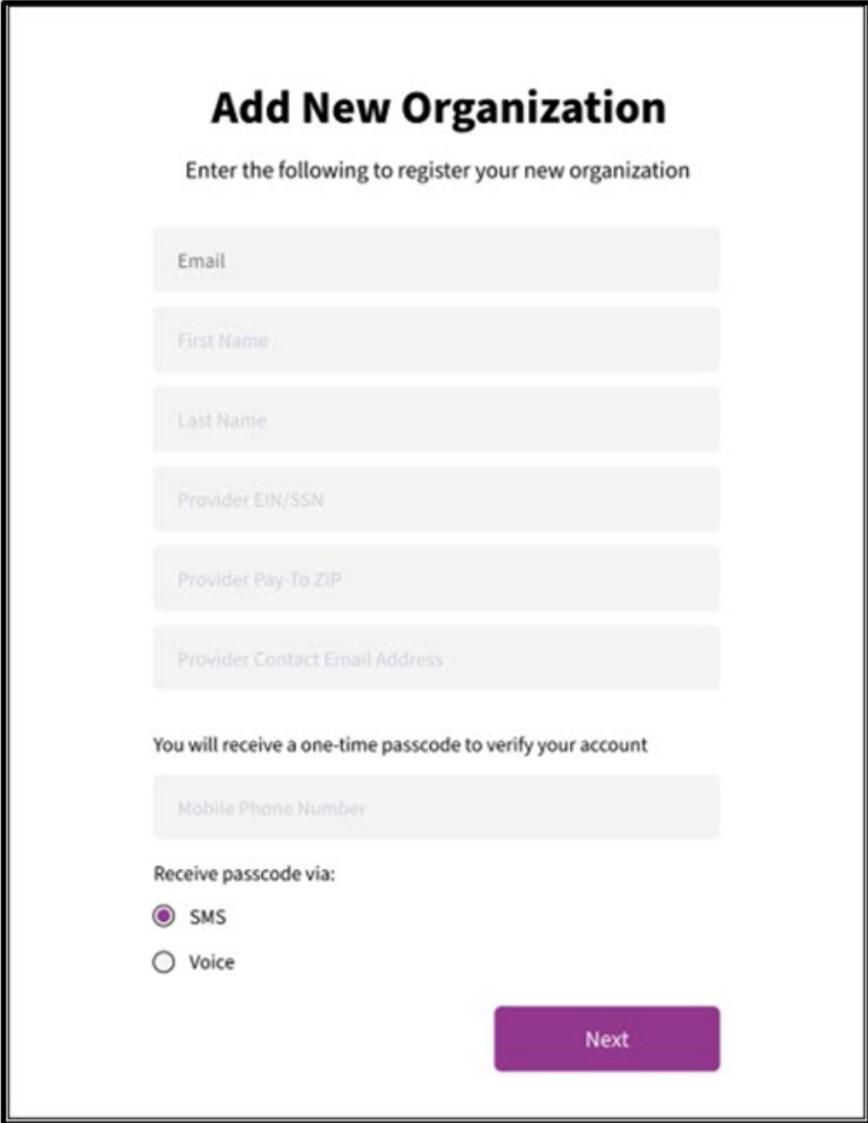
The screenshot shows a registration form titled "Account Information". Below the title is the instruction "Enter the following to register your account". The form contains several input fields: "Email", "First Name", "Last Name", "Provider EIN/SSN", "Provider Pay-To ZIP", and "Provider Contact Email Address". Below these fields is a section titled "You will receive a one-time passcode to verify your account" with a "Mobile Phone Number" input field. Underneath, there are two radio button options: "SMS" (which is selected) and "Voice". A purple "Next" button is located at the bottom right of the form.

Figure 1.4: Account Information window.

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5. If a user is already registered with a different organization, the **Add New Organization** window will display. Enter an Email, First Name, Last Name, Provider EIN/SSN, Provider Pay-To ZIP and Provider Contact Email Address. To receive an OTP, enter mobile phone number to receive a passcode via SMS or Voice and select **Next**.



The screenshot shows a registration form titled "Add New Organization". Below the title is the instruction "Enter the following to register your new organization". The form contains several input fields: "Email", "First Name", "Last Name", "Provider EIN/SSN", "Provider Pay-To ZIP", and "Provider Contact Email Address". Below these fields is a section titled "You will receive a one-time passcode to verify your account" with a "Mobile Phone Number" input field. Underneath, there are two radio button options: "SMS" (which is selected) and "Voice". A purple "Next" button is located at the bottom right of the form.

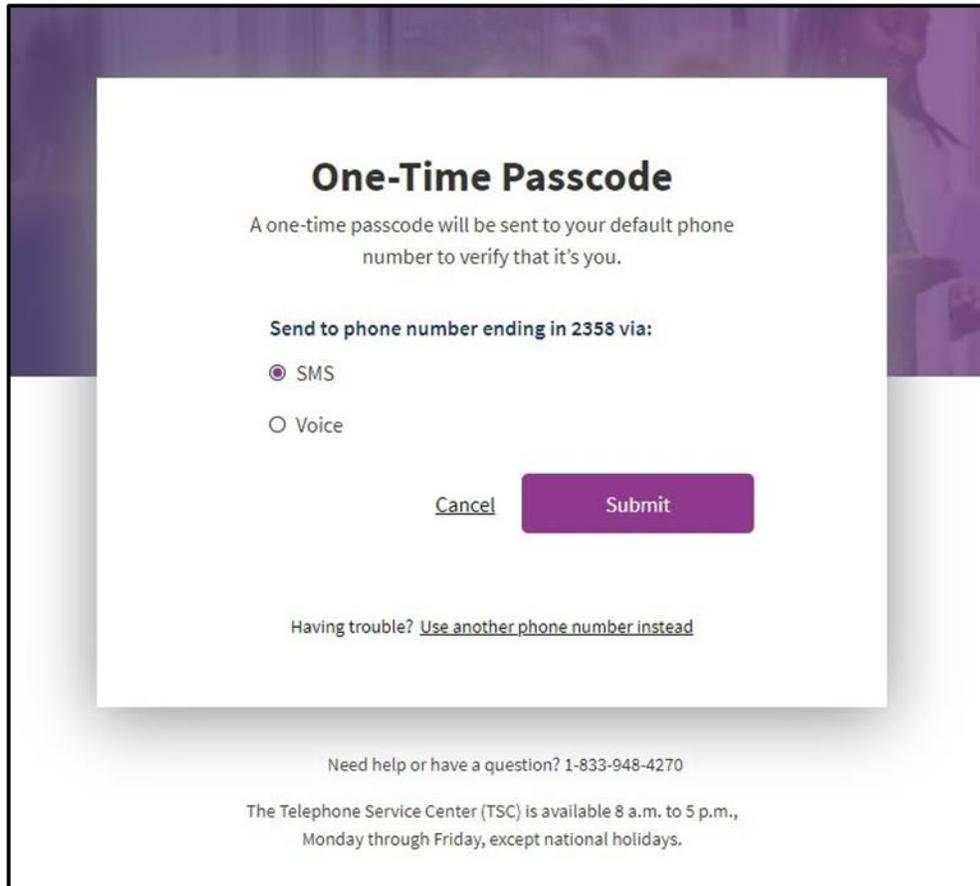
Figure 1.5: Add New Organization window.

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6. To verify the account, an OTP passcode will be sent to the user's phone. The user will need to indicate how to receive this passcode, via SMS or Voice. Select the method and select **Submit**.

Note: Various functions throughout the Provider Portal may request an OTP.



One-Time Passcode

A one-time passcode will be sent to your default phone number to verify that it's you.

Send to phone number ending in 2358 via:

SMS

Voice

[Cancel](#) **Submit**

Having trouble? [Use another phone number instead](#)

Need help or have a question? 1-833-948-4270

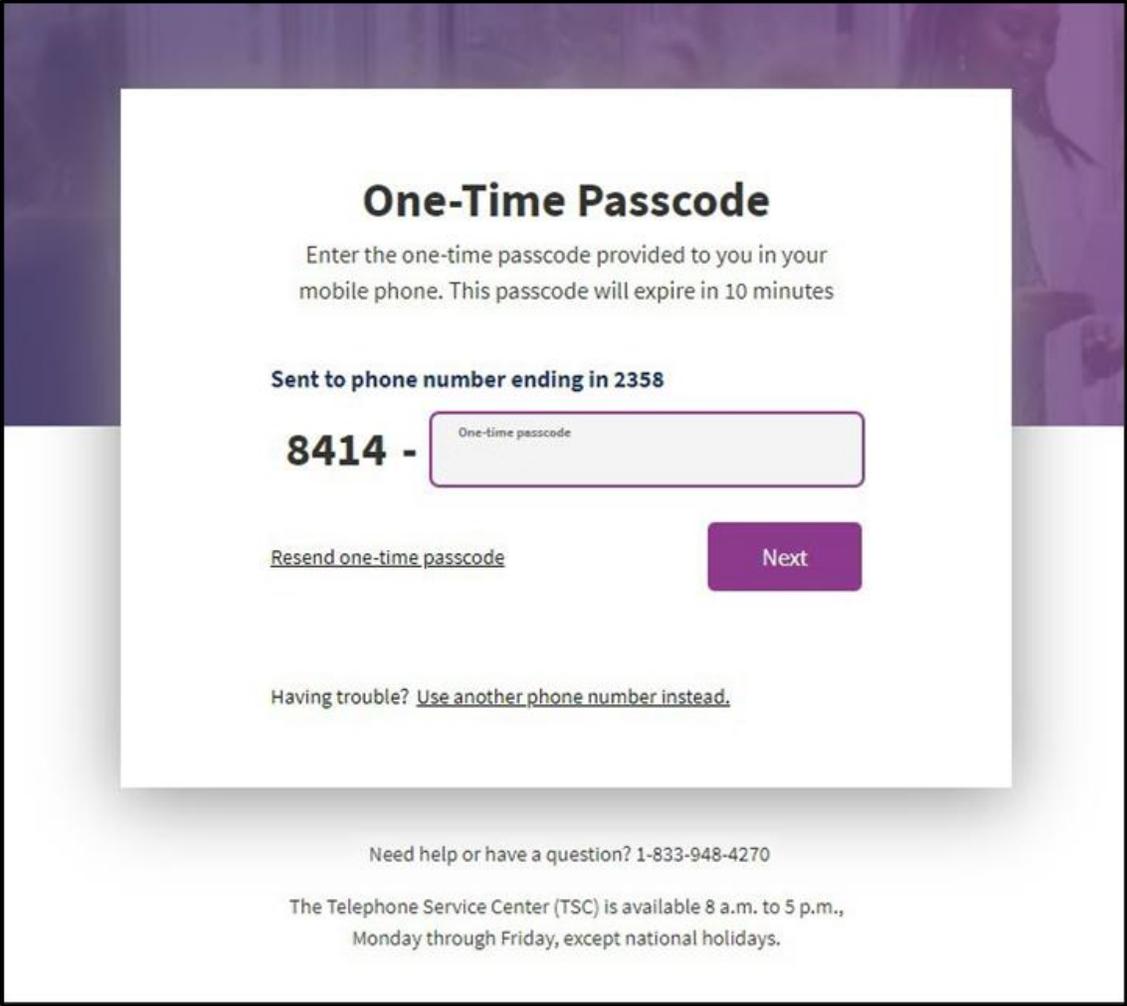
The Telephone Service Center (TSC) is available 8 a.m. to 5 p.m., Monday through Friday, except national holidays.

Figure 1.6: OTP passcode window.

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7. A passcode will be sent by the desired method. Enter the last six digits of the code that was sent and select **Next**.



One-Time Passcode

Enter the one-time passcode provided to you in your mobile phone. This passcode will expire in 10 minutes

Sent to phone number ending in 2358

8414 -

[Resend one-time passcode](#)

Having trouble? [Use another phone number instead.](#)

Need help or have a question? 1-833-948-4270

The Telephone Service Center (TSC) is available 8 a.m. to 5 p.m., Monday through Friday, except national holidays.

Figure 1.7: OTP passcode window with area to input the code.

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8. The Medi-Cal Online Conditions of Use Agreement will appear. Read the agreement, check both boxes and select **Next**.

Medi-Cal Online Conditions of Use Agreement

Workstation/Laptop encryption. All workstations and laptops that access the Medi-Cal website or process and/or store Medi-Cal PHI are recommended to be encrypted using a FIPS 140-2 certified algorithm, which is 128-bit or higher, such as Advanced Encryption Standard (AES); full disk encryption is recommended.

Part 1 - Medi-Cal Point of Service (POS) Network/Internet Agreement (PRO Pubs) point frm1 net 4 Page updated: December 2021 VI. The Provider/Representative agrees to pay the following fees

I am authorized to attest and agree to all of the terms and conditions of this agreement on behalf of my organization

I have read and agree to these conditions of use on behalf of my organization

Next

Figure 1.8: OTP passcode window with area to input the code.

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9. A window appears stating **Registration Complete**.

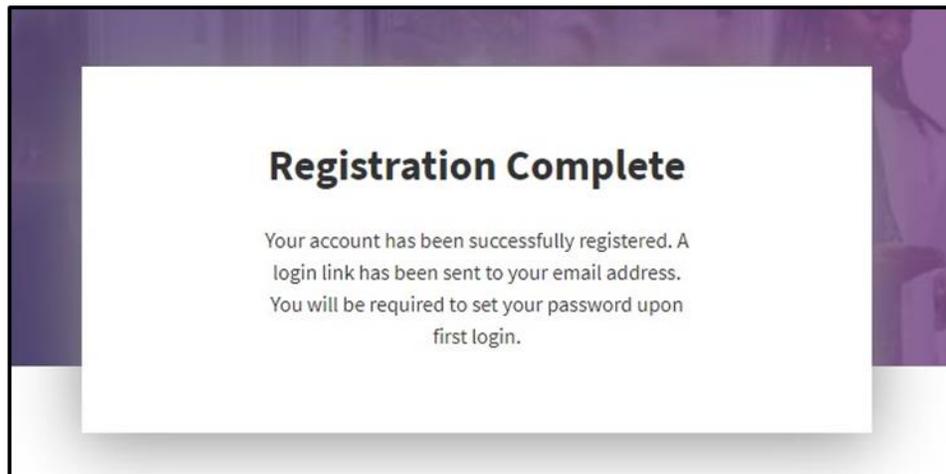


Figure 1.9: Registration Complete message.

10. An email will be sent to the email indicated during sign-up to set up a password. Select the link in the email to continue the registration process. This must be done within **30 minutes** or the link will expire. If this process is not completed within 30 minutes, a password reset can be initiated with the email used during registration in order to gain access to the portal.



Figure 1.10: "Set your new password for the Medi-Cal Portal" email from DHCS.

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11. A pop-up window will appear to create a new password. Enter a password that meets the password criteria and select **Submit**.

Note: The password must be a minimum of 15 characters and contain at least one uppercase letter, lowercase letter, number and special character. A recently used password cannot be reused.

Create New Medi-Cal Password

New Password
..... 

- ✓ Minimum of 15 characters
- ✓ Must include at least one: uppercase character, lowercase character, number, and special character (e.g. !\$#%)
- Cannot reuse a recently used password

Re-Enter Password

[View Password Requirements](#) **Submit**

Figure 1.11: Create a new Medi-Cal password screen.

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12. A message will display that the user's password has been successfully updated.

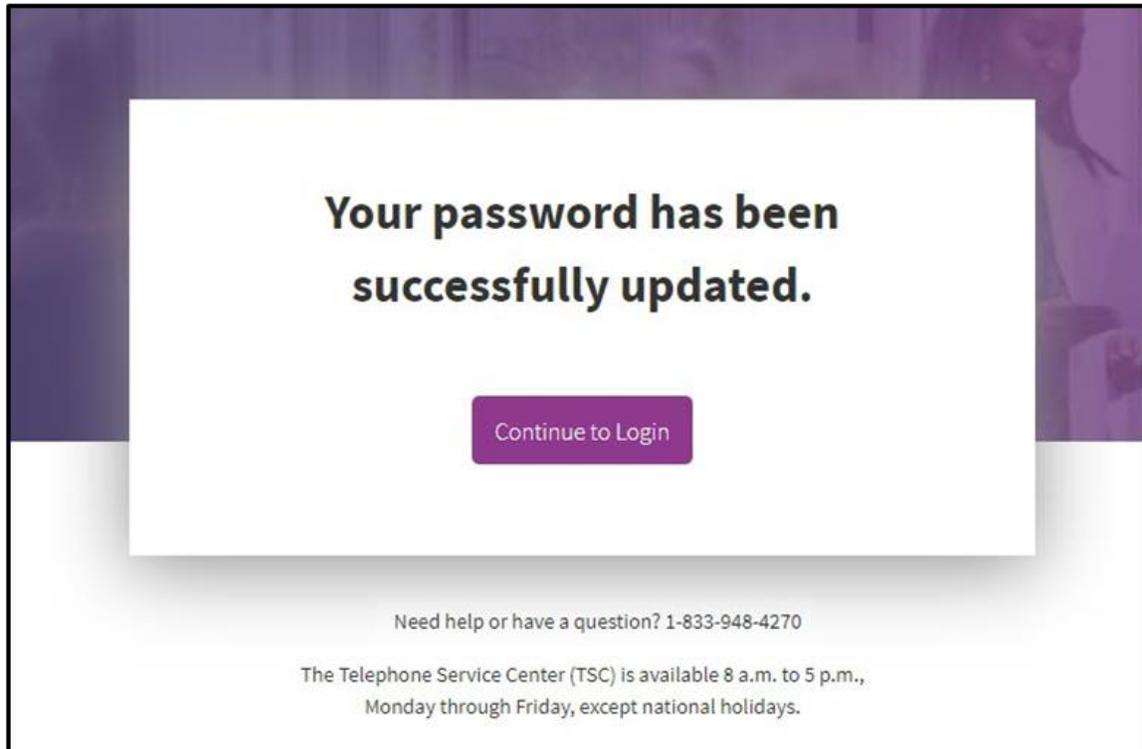


Figure 1.12: Password successfully updated message.

Options to Access the Provider Portal

The Provider Portal website can be accessed numerous ways.

1. Open a web browser, type <https://provider-portal.apps.prd.cammis.medi-cal.ca.gov/login> in the address bar and press **enter**.



Figure 2.1: Image of the web address typed into the address bar on the web browser.

2. From the Medi-Cal Provider website, navigate to the blue banner and under the Login drop-down menu select **Login to Provider Portal**.



Figure 2.2: Medi-Cal Providers website homepage **Login to Provider Portal** menu.

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3. Select **Provider Portal** from the Provider drop-down menu.

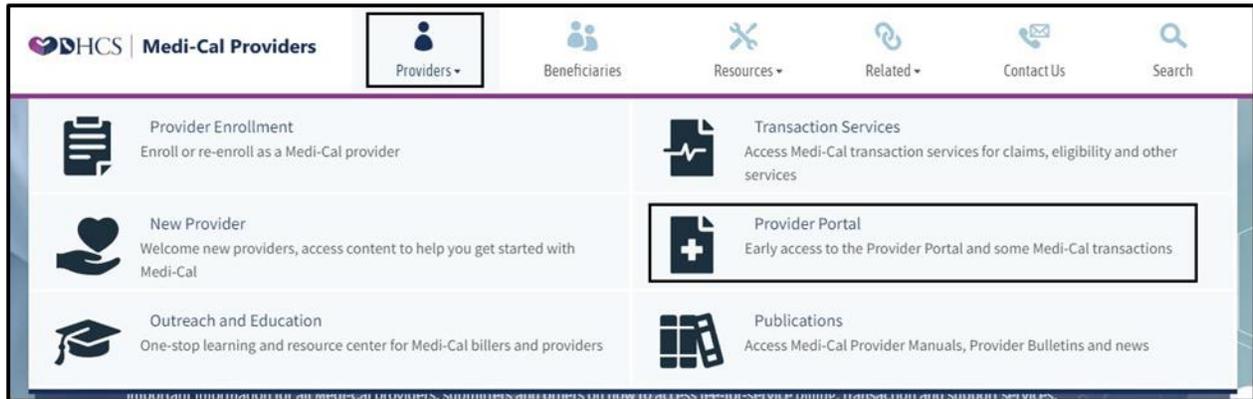


Figure 2.3: The Providers tab with the Provider Portal listing.

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4. Navigate to the Provider Portal tile in the mid-section of the Medi-Cal Providers website and select **Visit Provider Portal**.

The screenshot displays the Medi-Cal Providers website homepage. At the top, there is a navigation bar with the DHCS logo and the text "Medi-Cal Providers". To the right of the logo are several menu items: "Providers", "Beneficiaries", "Resources", "Related", "Contact Us", and "Search". Below the navigation bar is a large banner area with a background image of a stethoscope and medical icons. The banner contains the text "Welcome to the Medi-Cal Provider Home" and a paragraph describing the Medi-Cal program's goals. Below the banner are three main content tiles. The first tile is for the "Medi-Cal Learning Portal", which includes a description, "Training Services" (listing seminars, regional representatives, billing unit, eLearning, and recorded webinars), and a "VISIT OUTREACH AND EDUCATION" button. The second tile is for the "Medi-Cal Subscription Service (MCSS)", which includes a description of the service and a "SUBSCRIBE TODAY" button. The third tile is for the "Provider Portal", which includes a description of early access and a prominent "VISIT PROVIDER PORTAL" button. Below this button is a section for "Medi-Cal Transaction Services" with a "VISIT TRANSACTION SERVICES" button.

Figure 2.4: Visit the **Provider Portal** link on the Medi-Cal Providers website homepage.

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5. In the footer of the Medi-Cal Providers' homepage, navigate to Transactions section and select **Login to Provider Portal**.

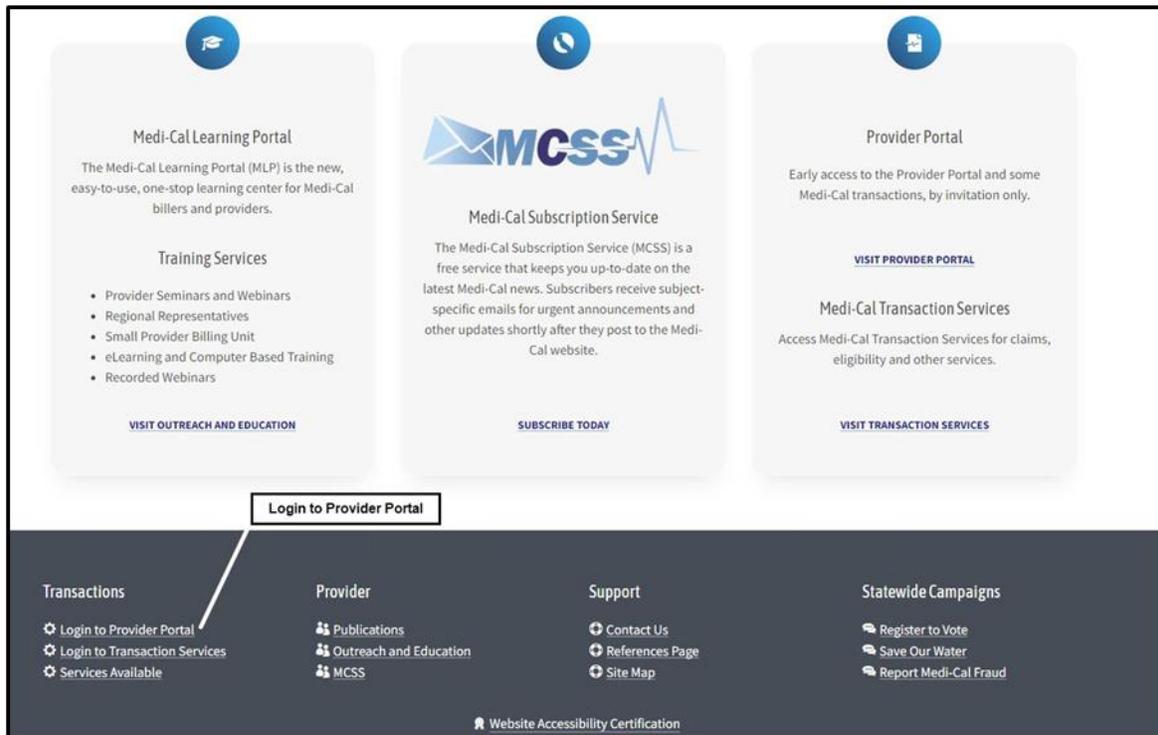


Figure 2.5: Login to Provider Portal link under the Transactions category.

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6. From the Transaction Services Login screen, select **Provider Portal**.

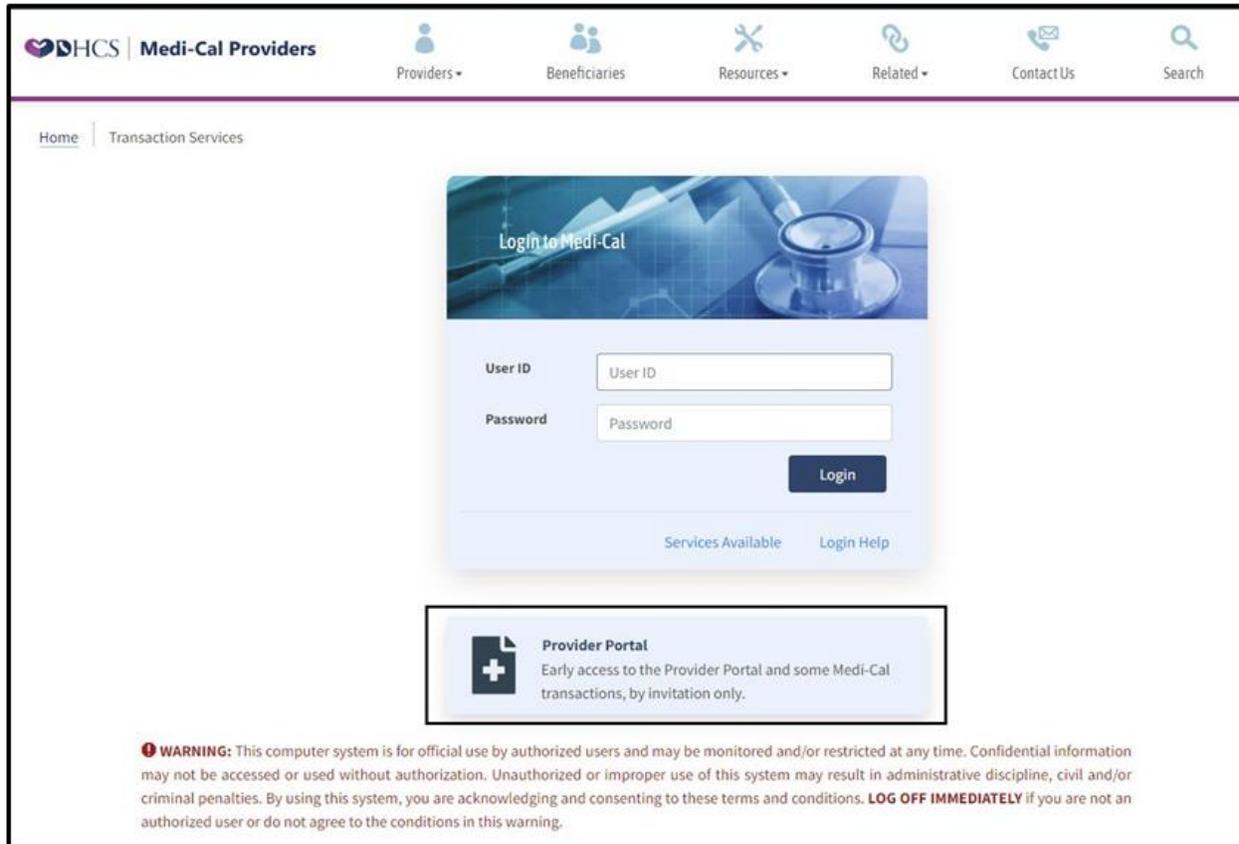
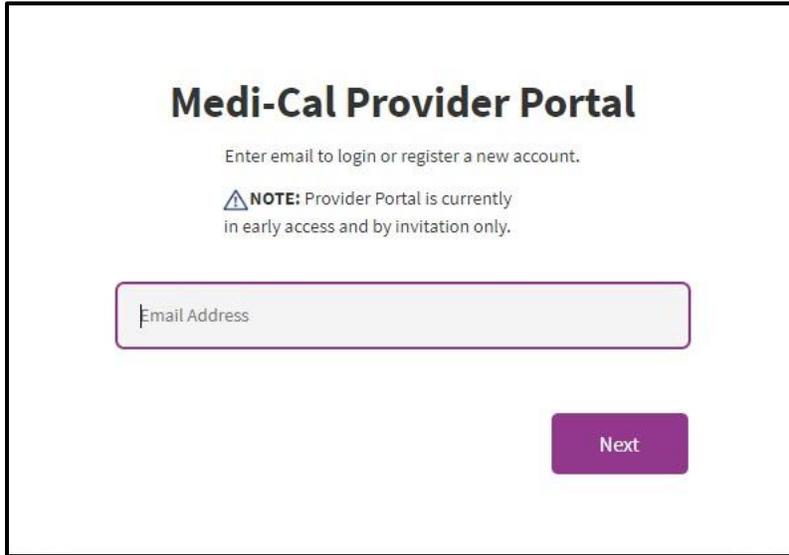


Figure 2.6: The **Provider Portal** link can be found on the Transactions Services login screen.

Logging into the Provider Portal

1. Once the user is directed to the Provider Portal website, enter the email address and select **Next**.



Medi-Cal Provider Portal

Enter email to login or register a new account.

NOTE: Provider Portal is currently in early access and by invitation only.

Email Address

Next

Figure 3.1: Enter Email address page to login to Medi-Cal Provider Portal.

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2. On the Log In screen, enter the password and select **Log In**.

Log In

If you already have a Medi-Cal Provider Portal account, please enter your credentials. If you do not, please click the button "Join Medi-Cal Provider Portal" below to join.

Email Address

Password

[Forgot password?](#) **Log In**

Click below to register for a new portal account

Join Medi-Cal Provider Portal

Need help or have a question? 1-833-948-4270

The Provider Portal Support Line is available 8 a.m. to 5 p.m., Monday through Friday, except national holidays.

Figure 3.2: Select **Log In** after entering the password.

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If a user forgets their password and needs to reset, it can be reset by doing the following steps:

1. From the Log In screen, select **Forgot Password?**

The screenshot shows a web interface for logging into the Medi-Cal Provider Portal. At the top, the heading "Log In" is centered. Below it, a paragraph of text reads: "If you already have a Medi-Cal Provider Portal account, please enter your credentials. If you do not, please click the button 'Join Medi-Cal Provider Portal' below to join." There are two input fields: "Email Address" and "Password". Below the "Email Address" field is a link labeled "Forgot password?". To the right of this link is a purple button labeled "Log In". At the bottom of the screen, there is a purple button labeled "Join Medi-Cal Provider Portal" with the text "Click below to register for a new portal account" above it.

Figure 3.3: On the Log In screen select “**Forgot password?**”

2. The reset window will appear, enter the appropriate email address and select **Reset Password**.



Reset Password

A reset link will be sent to your email address

Enter Email here

→ Reset Password

Figure 3.4: Reset Password option.

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3. A link to reset the password will be sent to the email address provided.



Figure 3.5: Email from DHCS with password reset link.

4. Click the link to reset the password. The user will be prompted to enter the last six digits of the passcode sent to their phone. Enter the code and select **Next**.

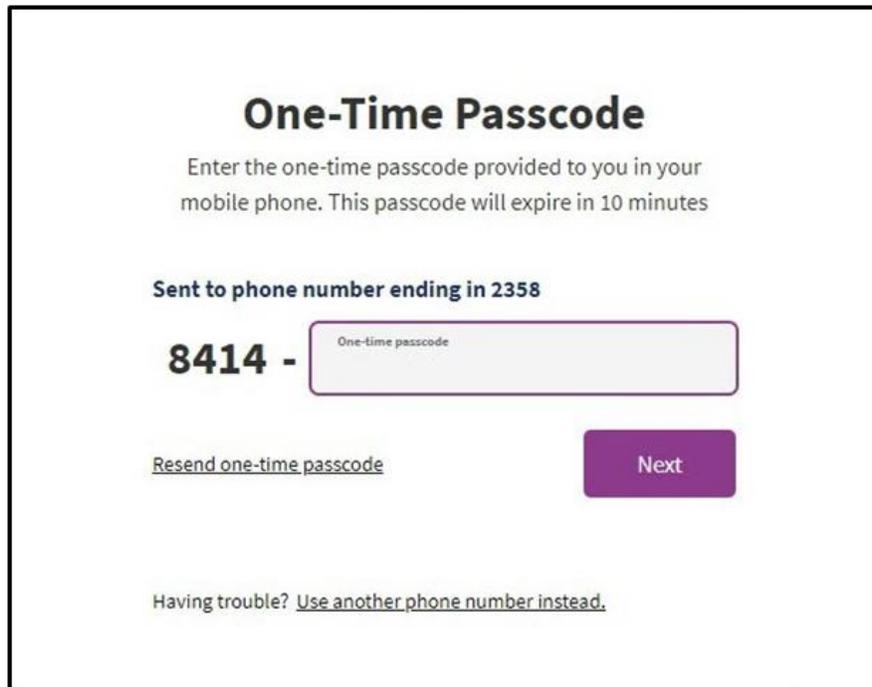
The image shows a web page titled "One-Time Passcode". The main heading is "One-Time Passcode" in a large, bold, dark font. Below it, the text reads: "Enter the one-time passcode provided to you in your mobile phone. This passcode will expire in 10 minutes". Underneath, it says "Sent to phone number ending in 2358". To the left of a text input field is the number "8414 -". The input field has a placeholder text "One-time passcode". Below the input field, there is a link that says "Resend one-time passcode" and a purple button labeled "Next". At the bottom of the page, there is a link that says "Having trouble? Use another phone number instead."

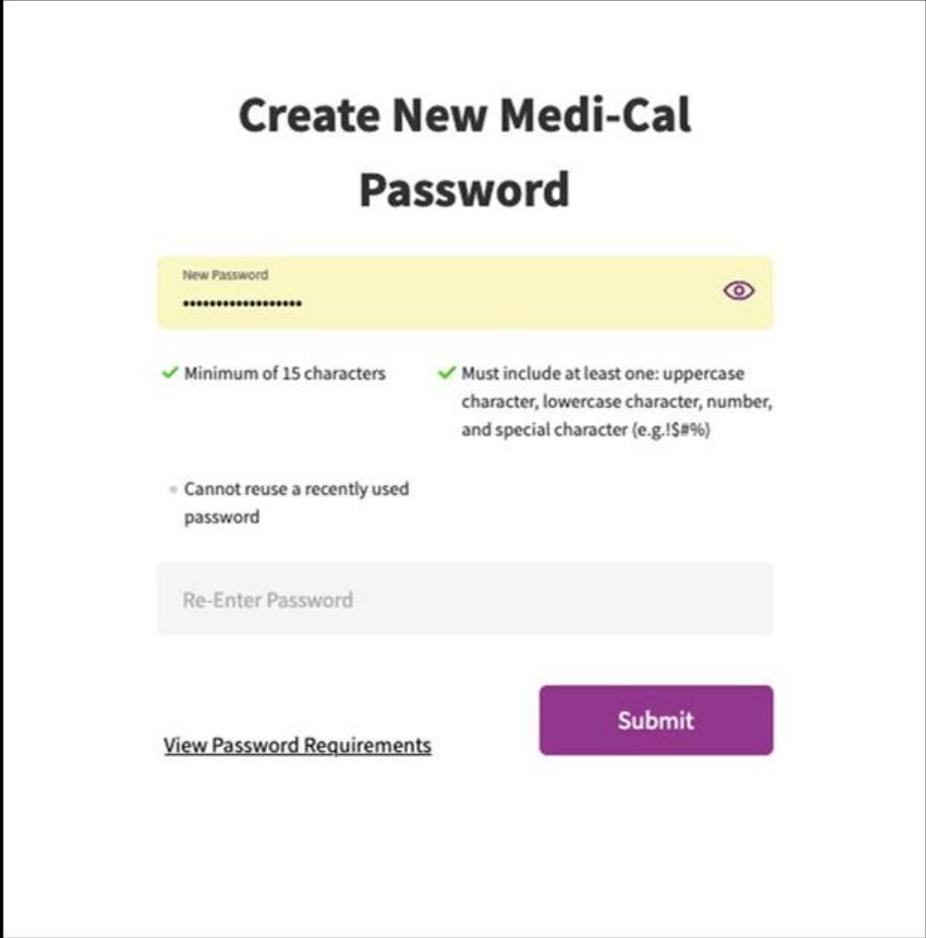
Figure 3.6: One-Time Passcode page to reset password.

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5. The Create New Medi-Cal Password page will display. Enter a new password and select **Submit**.

Note: The password must be a minimum of 15 characters and contain at least one uppercase, lowercase, number and special character. It cannot be a recently used password.



Create New Medi-Cal Password

New Password
.....

✓ Minimum of 15 characters

✓ Must include at least one: uppercase character, lowercase character, number, and special character (e.g.!\$#%)

✗ Cannot reuse a recently used password

Re-Enter Password

[View Password Requirements](#)

Submit

Figure 3.7: Select **Submit** after entering a new password on the Create a New Medi-Cal Password page.

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If the user that is logging in is a member of several organizations, a Select an organization screen will appear and all the organizations the user is a member of will display. If the user is assigned to a single organization, the Provider Portal homepage appears. If the user is registered as a provider and/or submitter, the Provider and/or Submitter tabs will appear.

Select an organization

Account

Frequent Organizations Show 5 Show 10

M MEDI-CAL PROVIDER NAME 00455 M MEDI-CAL PROVIDER NAME 00442 M MEDI-CAL PROVIDER NAME 00441

Provider Submitter

Search By NPI Search

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z # &

M

M MEDI-CAL PROVIDER NAME 00455 M MEDI-CAL PROVIDER NAME 00442 M MEDI-CAL PROVIDER NAME 00441

Figure 3.8: Select an organization screen.

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Provider Portal Homepage

Once logged into the Provider Portal, website the homepage is displayed.

Note: At times, a banner message will appear. This message will contain informational content. To remove the banner message, click on the **X** located in the upper-right corner.

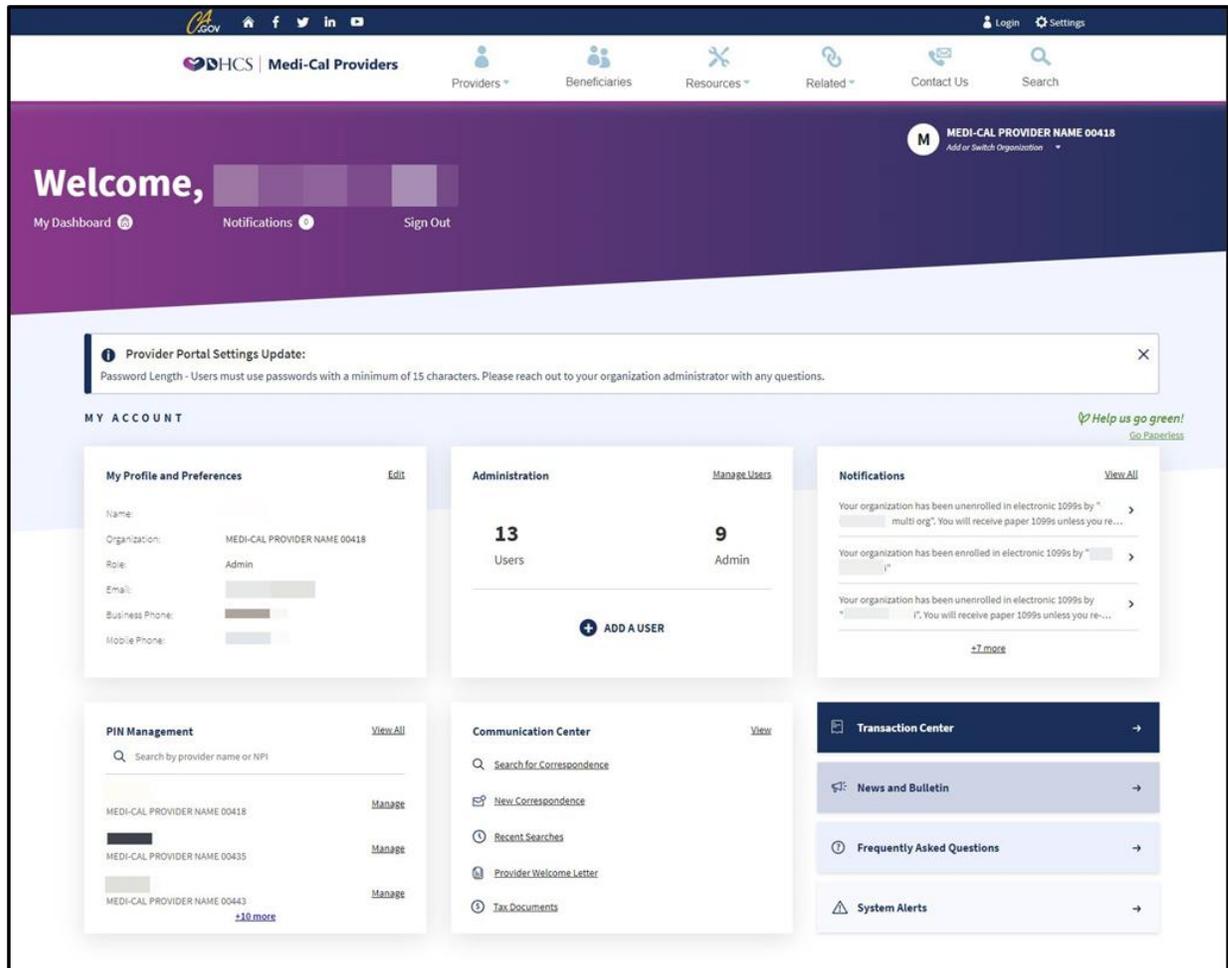


Figure 4.1: Provider Portal homepage.

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In the upper left corner, the options available are:

- My Dashboard – takes a user back to the homepage.
- Notifications – shortcut to notifications.
- Sign Out – sign out of the Provider Portal.

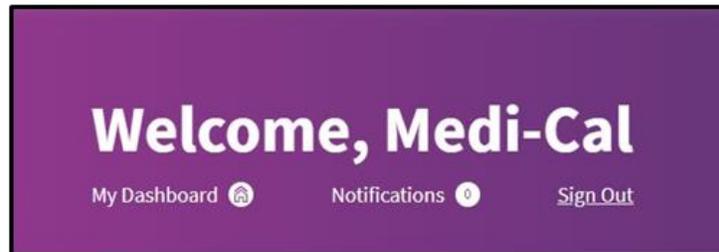


Figure 4.2: Options available in the upper left corner.

If a user is a member of more than one organization, in the upper right corner will be a drop-down menu allowing the user to switch the organization being viewed.

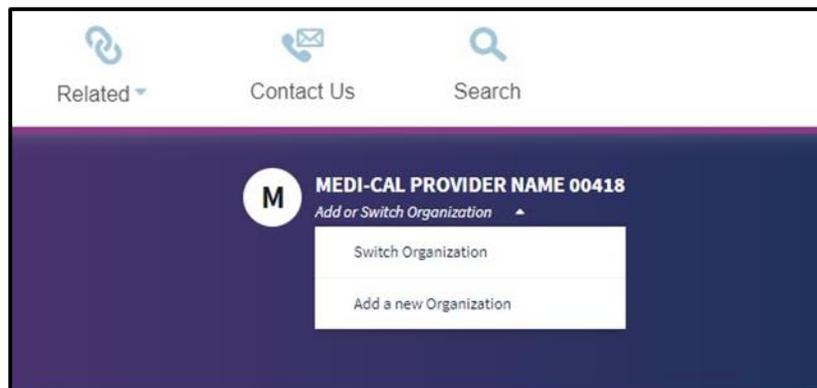


Figure 4.3: Drop-down menu options to add or switch organization.

The Go Green Paperless initiative encourages users to elect their correspondence be viewed in the Provider Portal and sent electronically to the provided email address. It is free, easy and can be customized. Select **Go Paperless** to enroll.



Figure 4.4: Go Paperless link.

Select **Enroll Now**.

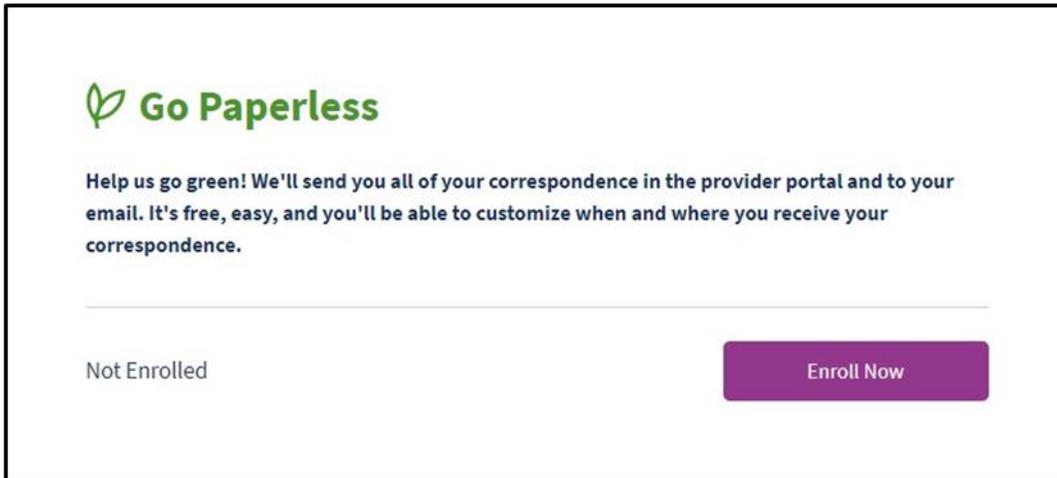


Figure 4.5: Go Paperless page with Enroll Now selection.

The user will receive a successfully enrolled message.

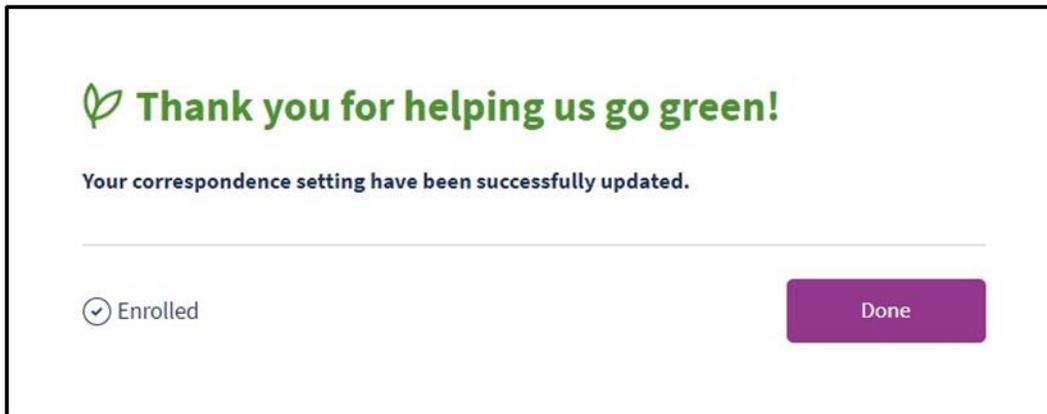


Figure 4.6: Successfully enrolled in paperless correspondence message.

Account Tiles

My Profile and Preferences

To make changes to a user's profile and preferences, select **Edit**.

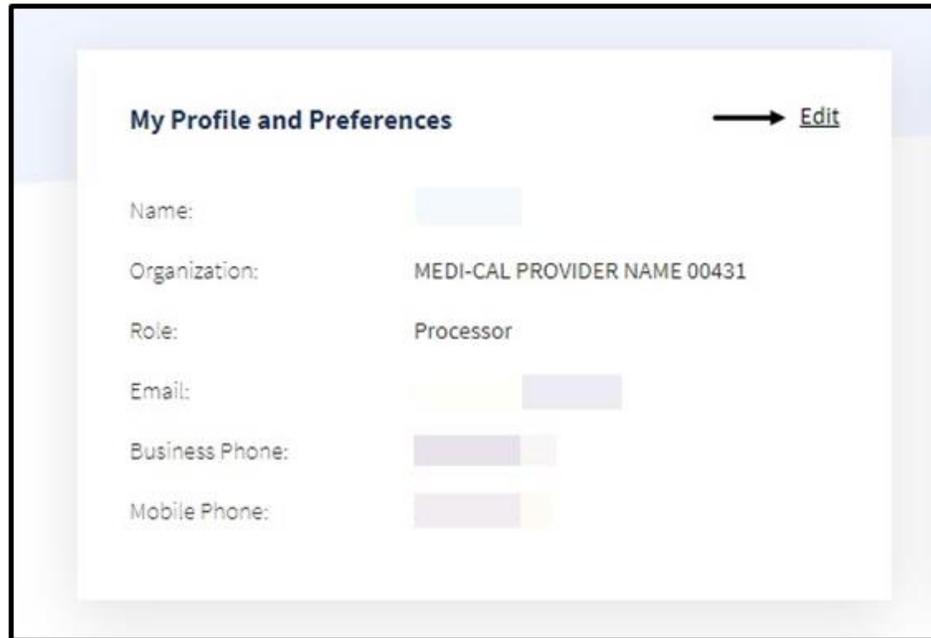


Figure 5.1: Select **Edit** to change user's profile and preferences.

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From here, Personal Information, Phone Number, Password and Notification Preferences can be updated. Let's look at each section separately.

Under **Edit Account Information**, a user can edit personal information, phone number as well as password.

The screenshot displays the 'Edit Account Information' page. It is divided into three main sections: Personal Information, Phone Number, and Password. Each section has an 'Edit' link. The Personal Information section includes fields for Name, Organization (MEDI-CAL PROVIDER NAME 00432), Role (Processor), and Email. The Phone Number section includes fields for Business Phone and Mobile Phone (Assigned to two-factor authentication). The Password section shows a masked password field. There is also a section for Two-factor authentication with explanatory text.

Edit Account Information

Personal Information [Edit](#)

Name: [Redacted]

Organization: MEDI-CAL PROVIDER NAME 00432 [Edit](#)

Role: Processor [Edit](#)

Email: [Redacted]

Phone Number

Business Phone: [Redacted] [Edit](#)

Mobile Phone: [Redacted] [Assigned to two-factor authentication](#) [Edit](#)

Two-factor authentication
is an extra layer of security for your user account designed to ensure that you're the only person who can access your account, even if someone knows your password.

Password [Edit](#)

Figure 5.2: Edit Account Information page.

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Under **Notifications Preferences** the frequency of notifications can be changed by selecting the dropdown menu for the desired notification. Org Admins have the option of receiving notifications about user activities. All users automatically receive notifications within the Provider Portal via the **Notifications** tile on the homepage. Users have the option of also receiving email notifications by selecting the **Email** checkbox. Once changes have been completed, select **Save Changes**. To go back to the homepage, navigate to left upper corner and select **Back to Dashboard**.

Notification Preferences

[Go Paperless: Enrolled](#) [View](#)

	Portal	Email	Notification Frequency
User Activity			
Notify me when a user downloads or views correspondence in my organization	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
Notify me when a user in my organization downloads a document containing sensitive information	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
Notify me when a password for a user in my organization is about to expire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5 Days Before
New Correspondence			
Notice Of Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
Provider Welcome Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Treatment Authorization Request	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
Password			
Notify me when my password is about to expire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5 Days Before
Notify me when my password has been reset	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Always

[Save Changes](#)

Figure 5.3: Notification Preferences page for Org Admins.

Administration

The **Administration** tile allows for management of users in an organization. Tasks include adding/removing users, updating user permissions and viewing information about users in the organization.

This area may only be accessed by individuals who are designated as Admins.

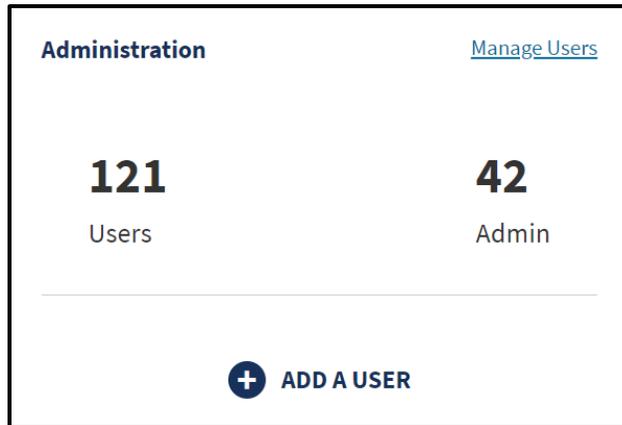


Figure 5.4: Administration area of the Portal home page.

Update User Information/Permissions

To update user permissions after the initial assigning of permissions, follow these steps:

1. Click **Manage Users** on the **Dashboard**.

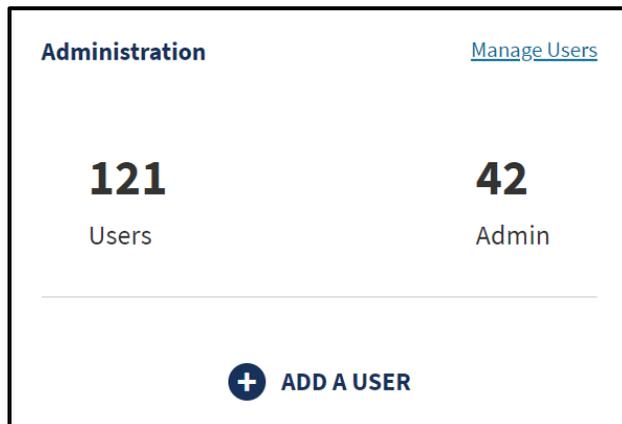


Figure 5.5: Administration area of the Portal home page.

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2. The user management area appears. Search for the user in the search box and click the row when it appears.

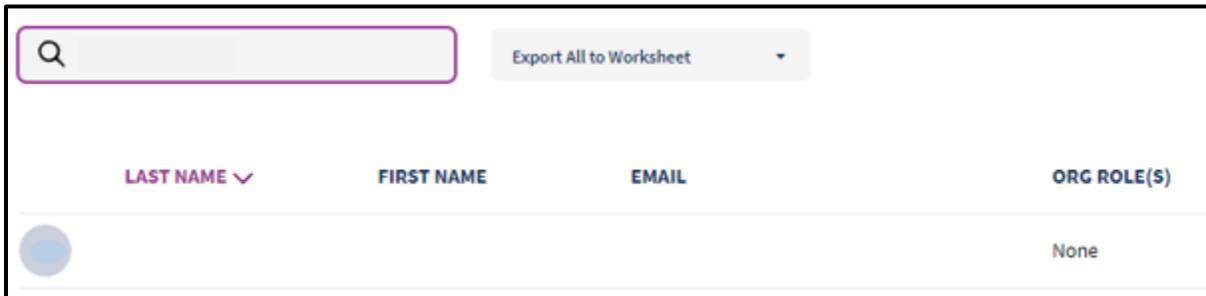


Figure 5.6: User management area for updating user information and permissions.

3. The User Management and Permissions page appears. The NPI Permissions, Correspondence Permissions and Permissions Across Organization can be viewed and edited. Select **Edit** next to the permissions desired. For further steps, refer to the “Add User” section of this user guide.

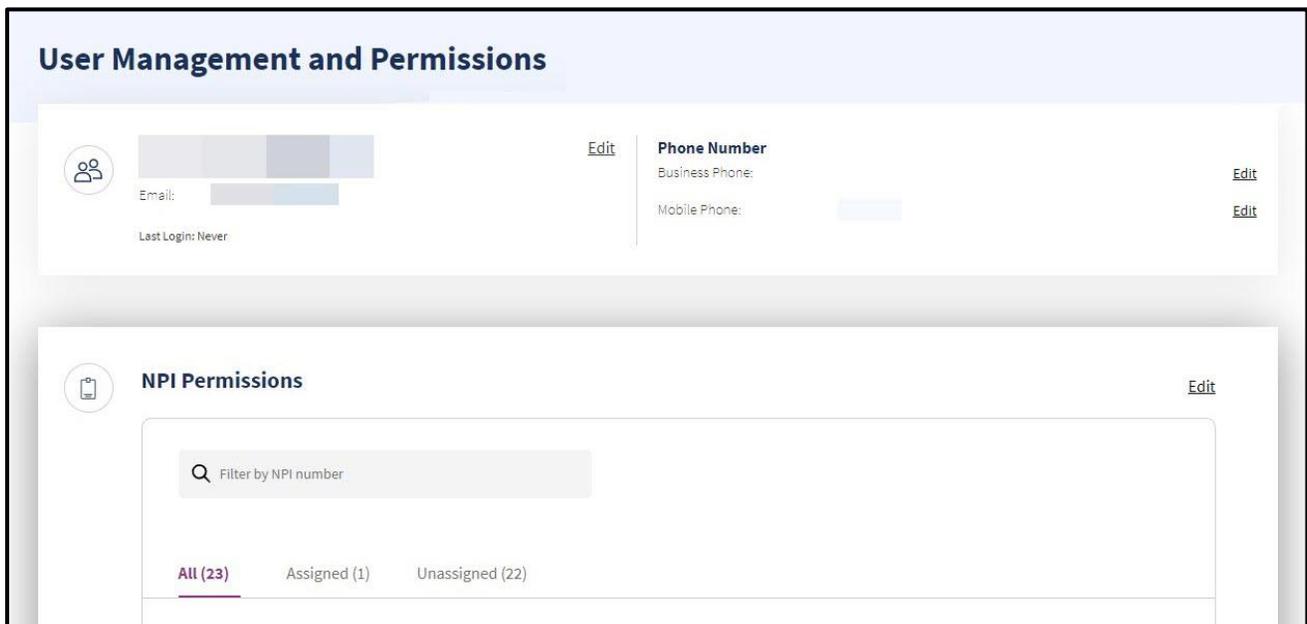


Figure 5.7: User management and permissions area.

Deactivate User

Complete the following to deactivate a user:

1. On the **Dashboard**, select **Manage Users** contained in the **Administration** tile to open the user management area.

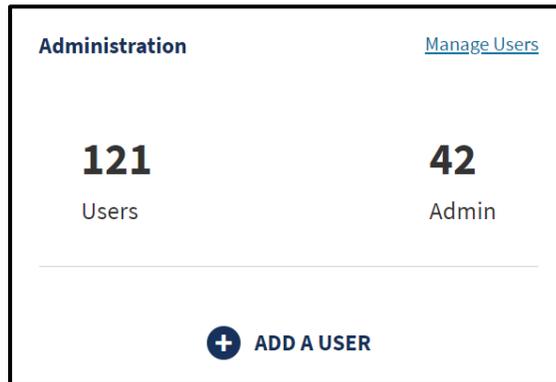


Figure 5.8: Administration area of the Portal home page.

2. In the search bar, search for the desired user to deactivate. Select the row that appears to open the user's information profile.

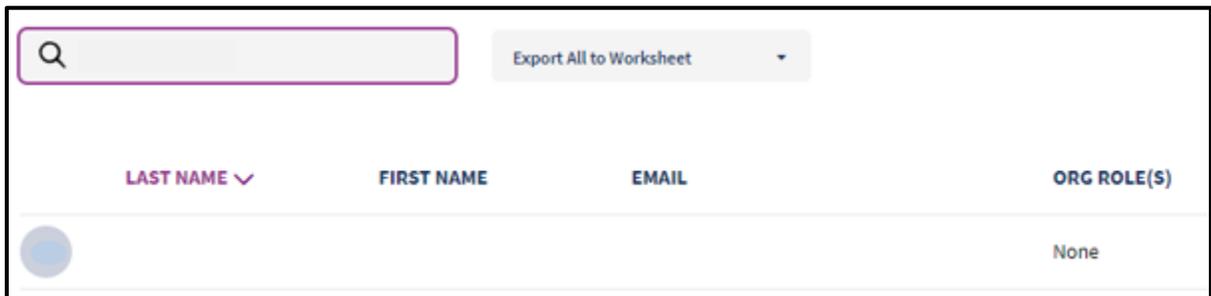


Figure 5.9: User management area for updating user information and permissions.

3. At the top right corner of the user profile, select the **kebab menu** in the top right corner. A link to **Deactivate User** appears.



Figure 5.10: User Management and Permissions with the Deactivate User option.

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4. Click **Deactivate User**. A pop-up window appears prompting to deactivate this user. Click **Confirm**.

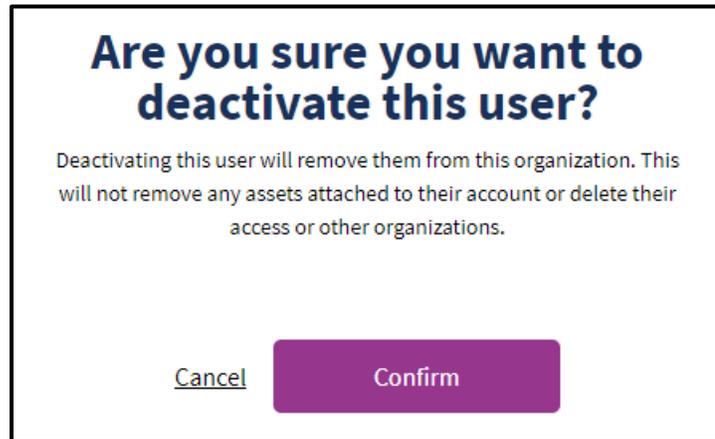


Figure 5.11: Pop-up window prompting to deactivate this user.

5. Once the confirm button has been selected, the user's profile displays, now with **Deactivated User** above the name. Users can be reactivated at any time.



Figure 5.12: Follow-up User Management and Permissions screen with Deactivated User above name.

Reactivate User

Complete the following to reactivate a user:

1. On the **Dashboard**, select **Manage Users** contained in the **Administration** tile to open the user management area.

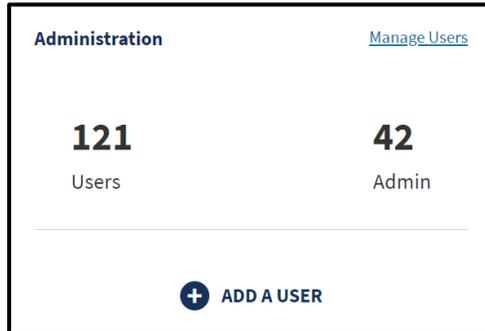


Figure 5.13: Administration area of the Portal home page.

2. In the search bar, search for the desired user to reactivate. Select the row that appears to open the user's information profile.

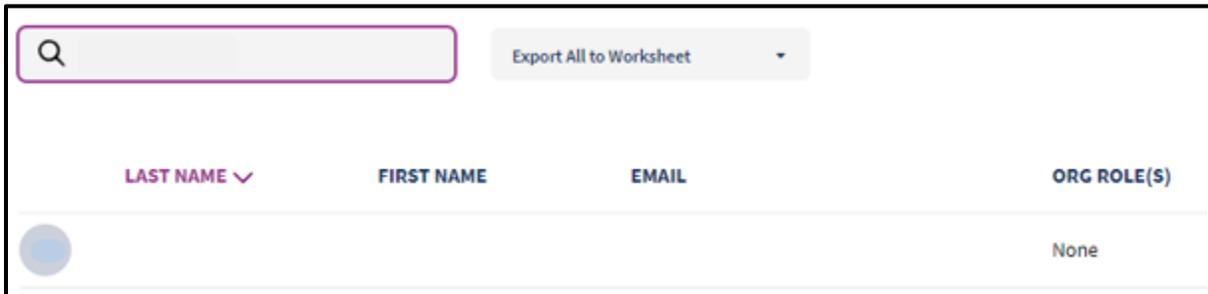


Figure 5.14: User management area for updating user information and permissions.

3. At the top right corner of the user profile, select the **kebab menu** in the top right corner. A link to **Reactivate User** appears.



Figure 5.15: User Management and Permissions screen with Reactivate User option.

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4. Click **Reactivate User**. A pop-up window appears prompting to reactivate this user. Click **Confirm**.

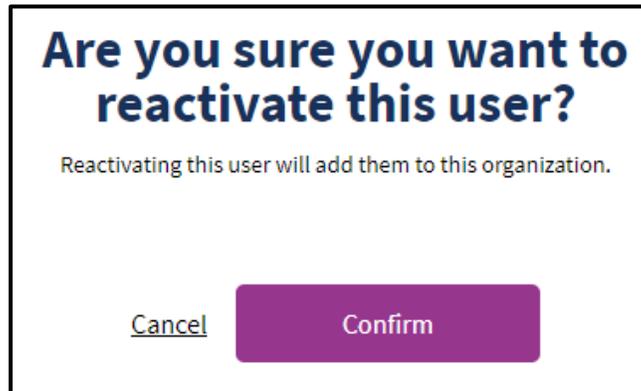


Figure 5.16: A pop-up window prompting to reactivate this user.

5. Once the confirm button has been clicked, the user is active again.

Domain Management

To remove an unwanted domain from your organization, first ensure that there are no active users with that email address. If there are, those users must be deactivated first in order to remove the domain.

1. In the Administration tile, click **Manage Users**.

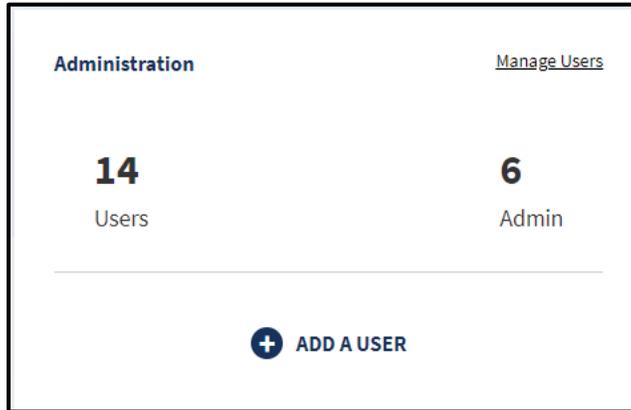


Figure 6.1: Administration area of the Portal home page.

2. Click **Domain Management**

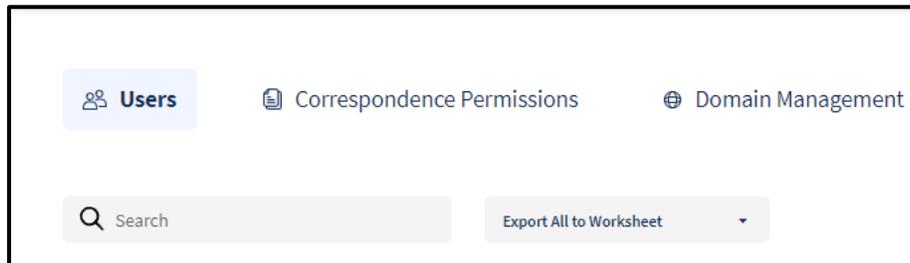


Figure 6.2: Domain management screen.

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3. Click **Remove** next to the domain that should be removed.



Figure 6.3: Domain management screen continued.

Notifications

The **Notifications** tile displays an organization's unread and past messages. The most recent notifications appear on the dashboard. To view more messages, a user can select **View All** or **+ more**.



Figure 6.4: The Notifications tile.

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Once View All or +more is selected, a page appears with all past and current notifications. Past notifications can be viewed by using the search field or by using the **Filter By Date** feature. To use this feature, select the Filter By Date menu and enter the desired date range and select **Apply**. Also in the upper right corner, is a link to **Edit Notification Preferences**.

The screenshot displays the 'Notifications' page. At the top left is the title 'Notifications'. At the top right is a link 'Edit Notification Preferences'. Below the title is a search bar with a magnifying glass icon and the text 'Search'. To the right of the search bar is a button labeled 'Filter By Date'. The main content area shows a list of notifications. The first notification is dated 'September 7, 2022' and contains the text 'Your organization has been enrolled in electronic 1099s by'. The second notification is dated 'September 5, 2022' and contains the text 'Your organization has been unenrolled in electronic 1099s by'. A 'Show More' button is located at the bottom right of the notification list. A date filter overlay is open, showing a calendar for 'September 2022'. The 'Start Date' field is set to '09/01/2022'. The 'End Date' field is empty. The calendar shows dates from 1 to 30. An 'Apply' button is located at the bottom right of the date filter overlay.

Figure 6.5: The Notifications page with **Edit Notification Preferences** link in the upper right corner.

PIN Management

The NPIs that are assigned to an organization are viewable in the **PIN Management** tile on the homepage. The user's Org Admin determines which NPIs are viewable to a user. To view more NPIs, a user can select **View All** or **+ more**.

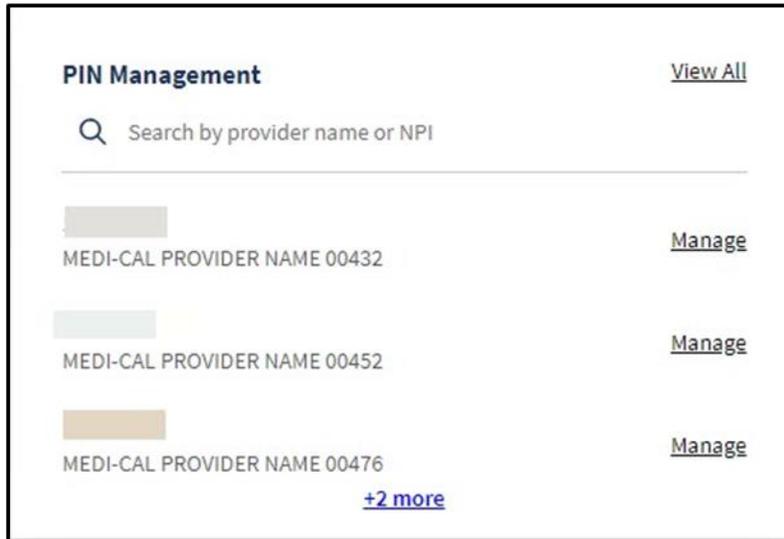


Figure 6.6: PIN Management tile.

Additionally, from the PIN Management tile, the user can type in the search bar the provider's name or NPI.

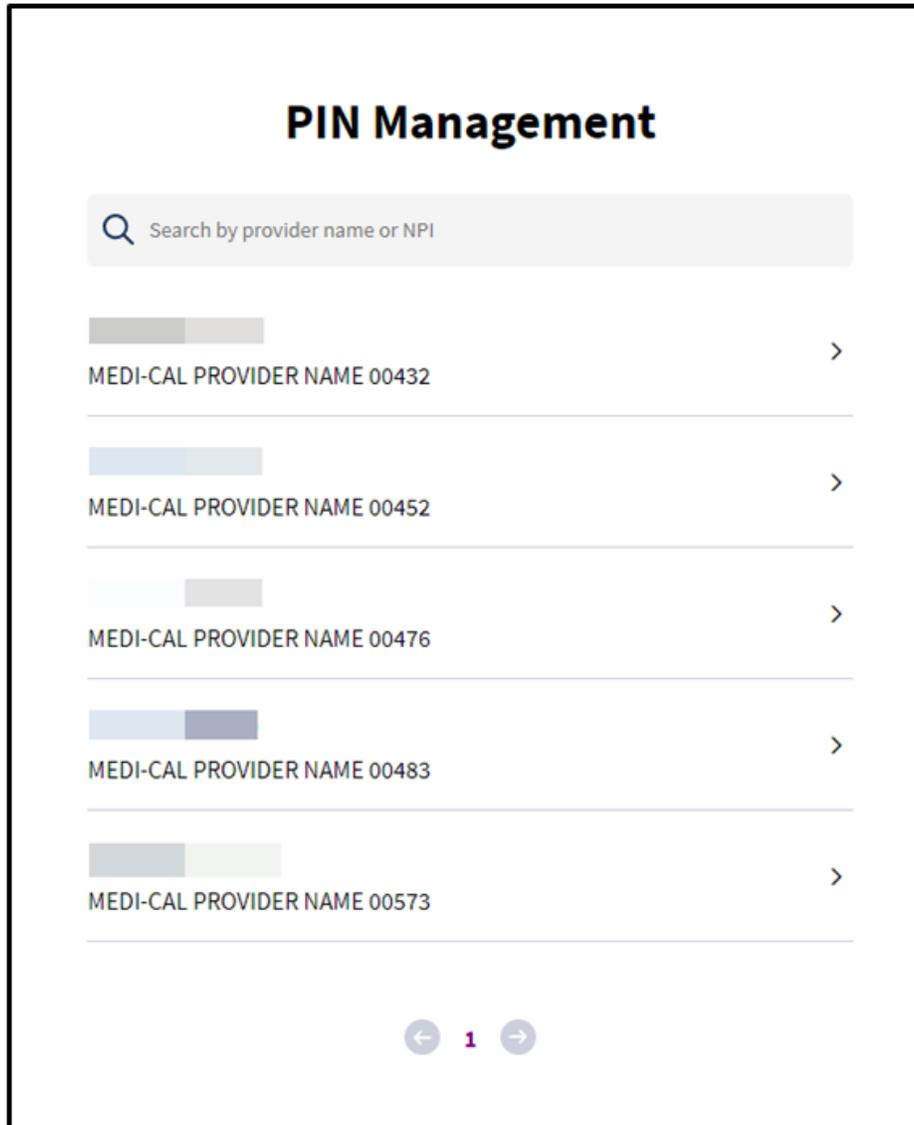


Figure 6.7: PIN Management tile search bar.

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After selecting **View All** or **+more**, from here search by provider name or NPI as well as select the desired provider name from the list.



The screenshot displays the 'PIN Management' interface. At the top, there is a search bar with a magnifying glass icon and the text 'Search by provider name or NPI'. Below the search bar, there is a list of five provider entries. Each entry consists of a colored bar (representing a PIN), the text 'MEDI-CAL PROVIDER NAME' followed by a number, and a right-pointing chevron icon. The entries are: 00432, 00452, 00476, 00483, and 00573. At the bottom of the list, there is a pagination control showing a left arrow, the number '1', and a right arrow.

Figure 6.8: Search by provider name or NPI.

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Once a provider is selected, a user can view the PIN number by selecting **Hold to View**. From this screen a user can also **Reset PIN**.

Note: PINs can only be reset once daily.

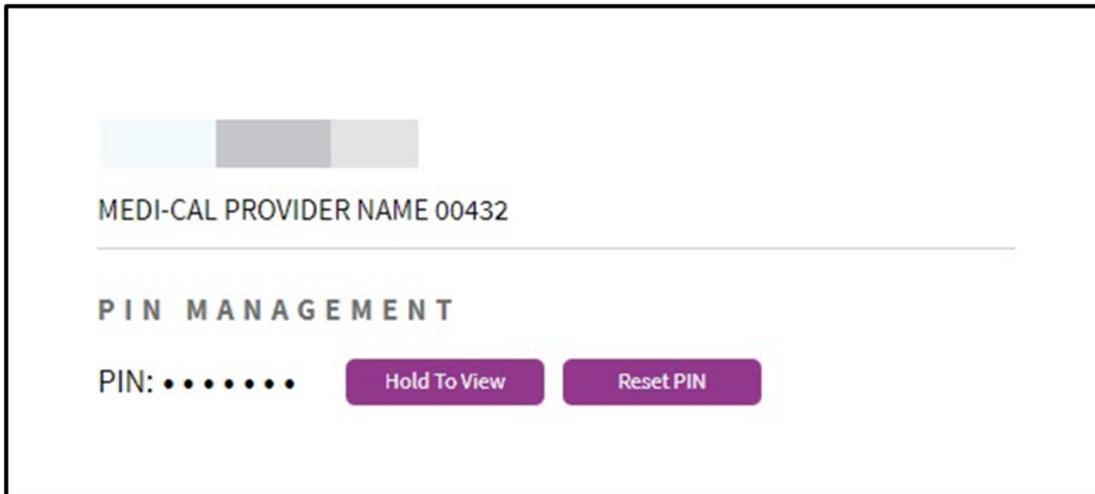


Figure 6.9: View PIN number and **Reset PIN**.

Communication Center

The **Communication Center** allows access to an organization's correspondence.

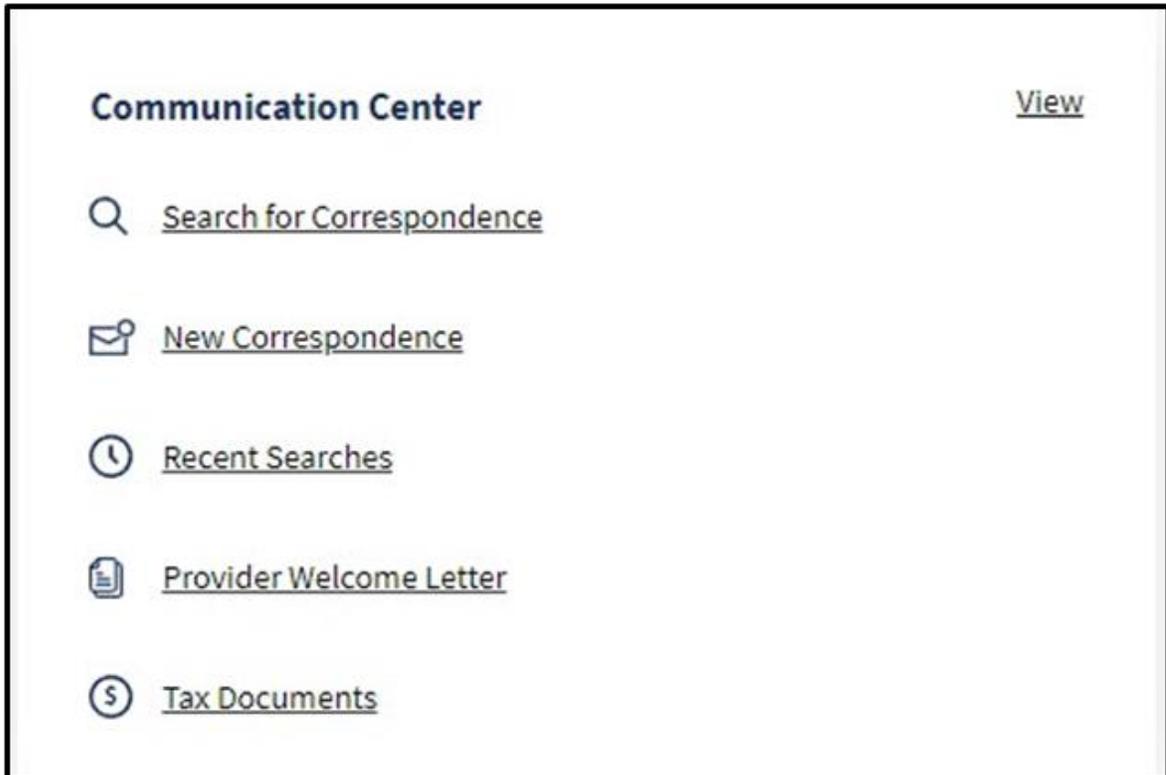


Figure 6.10: Communication Center tile.

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When **Search for Correspondence** is selected, three search fields will display and each field must be populated to obtain search results.

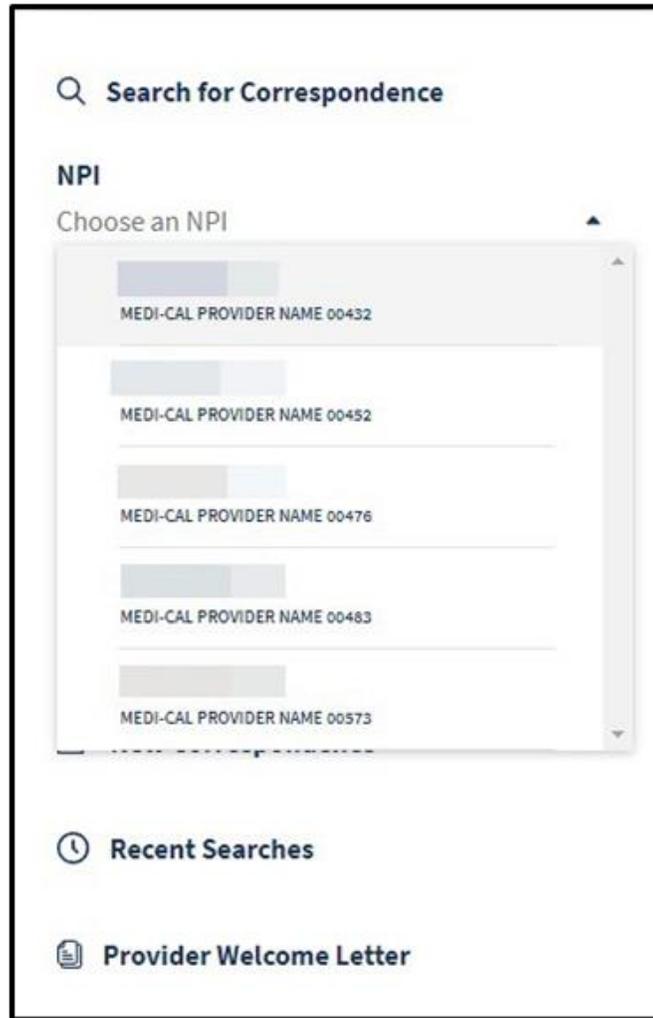
The screenshot displays the 'Search for Correspondence' interface. On the left, there is a sidebar with the following elements: a search icon and title 'Search for Correspondence', three filter sections ('NPI' with 'Choose an NPI', 'Correspondence Type' with 'Choose Document Type', and 'Dates' with 'Choose Date Range'), a purple 'Search' button, and three navigation links: 'New Correspondence' (with an envelope icon), 'Recent Searches' (with a clock icon), and 'Provider Welcome Letter' (with a document icon). The main content area is titled 'Document Results' and shows '0 Documents | Last 0 days'. Below this, there is a table header with columns 'Name' and 'Date', and a prompt 'Click filters and search to show documents'.

Figure 6.11: Search for Correspondence screen.

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Select an **NPI** from the drop-down list.



The screenshot displays a web interface for searching correspondence. At the top, there is a search bar with a magnifying glass icon and the text "Search for Correspondence". Below this, the section is titled "NPI" and contains a dropdown menu labeled "Choose an NPI". The dropdown menu is open, showing a list of five options, each consisting of a blurred provider name followed by a unique identifier: "MEDI-CAL PROVIDER NAME 00432", "MEDI-CAL PROVIDER NAME 00452", "MEDI-CAL PROVIDER NAME 00476", "MEDI-CAL PROVIDER NAME 00483", and "MEDI-CAL PROVIDER NAME 00573". Below the dropdown menu, there are two additional sections: "Recent Searches" with a clock icon and "Provider Welcome Letter" with a document icon.

Figure 6.12: Search for Correspondence screen with **NPI** selected.

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Select **Correspondence Type** from the drop-down list.

The screenshot shows a web interface for searching correspondence. At the top, there is a search bar with the text "Search for Correspondence". Below this is a section for "NPI" with a dropdown menu currently displaying "- MEDI-CAL PROVIDER NAME ...". The main section is titled "Correspondence Type" and features a dropdown menu with the placeholder text "Choose Document Type". This menu is open, showing three options: "Notice of Action - Provider Copy", "PDF Remittance Advice Detail", and "SCPI Data File". Below the dropdown menu, there are three navigation links: "New Correspondence" (with an envelope icon), "Recent Searches" (with a clock icon), and "Provider Welcome Letter" (with a document icon).

Figure 6.13: Search for Correspondence screen with **Correspondence Type** selected from the NPI search list.

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Select a **Date Range** option or enter a start and end date.

The screenshot shows a web interface for searching correspondence. At the top, there is a search bar labeled "Search for Correspondence". Below it, there are fields for "NPI" (with a dropdown menu showing "- MEDI-CAL PROVIDER NAME ...") and "Correspondence Type" (with a dropdown menu showing "PDF Remittance Advice Detail"). The "Dates" section is highlighted, showing a "Choose Date Range" dropdown menu. The menu is open, displaying options: "Last 7 Days", "Last 14 Days", "Last 30 Days", and "Custom". The "Custom" option is selected, and a sub-menu is shown with the instruction "Select a custom date range of up to 30 days at a time." This sub-menu contains two input fields: "Start Date" (with the value "06/01/2022") and "End Date". Below these fields is a calendar for "June 2022" with dates from 1 to 30. An "Apply" button is located at the bottom right of the date range selector.

Figure 6.14: Data Range selected on the Search for Correspondence screen.

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Document Results are displayed. Check the box(es) of the desired document(s). To download the document(s) select the kebab menu in the upper right corner and choose the preferred format.

The screenshot shows a 'Document Results' page with the following elements:

- Section title: Document Results
- Sub-header: 4 Documents | Last 30 days
- Sort dropdown: Name
- Table of documents:

Selection	Format	Name	Date	Actions
<input checked="" type="checkbox"/>	TAR	Request for Poly-Vi Sol with Iron Drops1		
<input checked="" type="checkbox"/>	TAR	Request for Poly-Vi Sol with Iron Drops2	08/19/2021	⋮
<input type="checkbox"/>	TAR	MCAL_81419058_20210607	08/19/2021	⋮
<input type="checkbox"/>	TAR	MCAL_575765878_041921	08/19/2021	⋮

The kebab menu for the second document is open, showing the following options:

- Export(2) as .csv
- Export(2) as .txt
- Export(2) as .xls

Figure 6.15: Search results displayed on the **Document Results** page.

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When the **New Correspondence** link is selected, it will show a user all of the new correspondence since the last time a user has logged in.

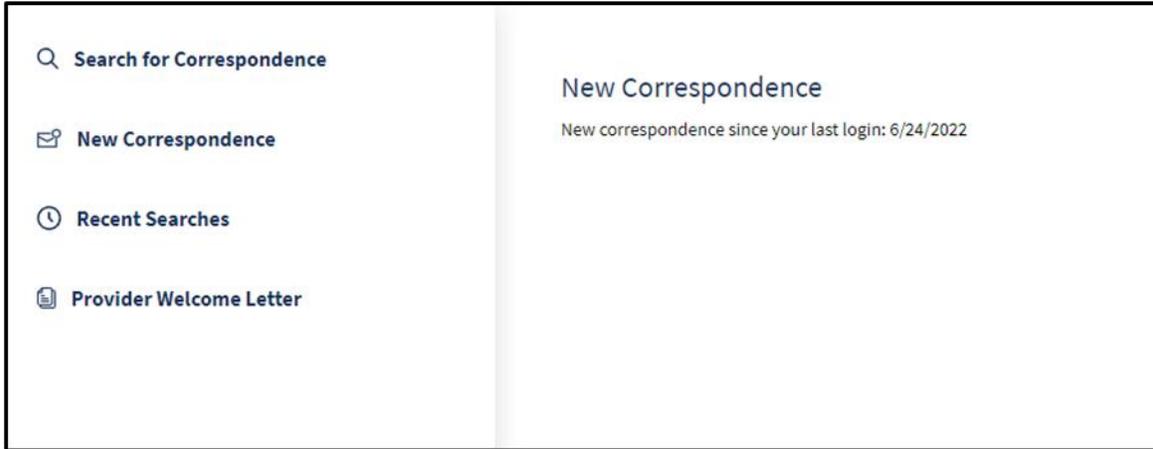


Figure 6.16: New Correspondence listed.

Recent Searches link displays the user's most recent correspondence searches.

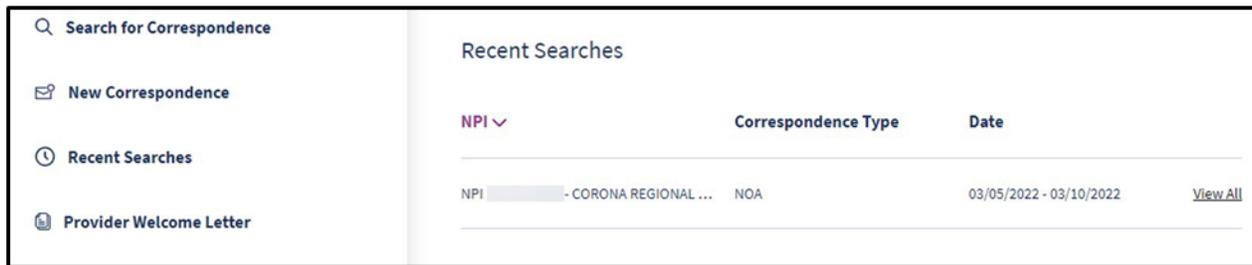


Figure 6.17: Recent Searches displayed.

Provider Welcome Letter

Provider welcome letters contain information about NPIs, and provider communities related to the organization. To view, follow the steps below:

1. From the Communication Center tile, select **Provider Welcome Letter**. The Correspondence Center will display a list of Provider Types. Select the desired **Provider Type**.

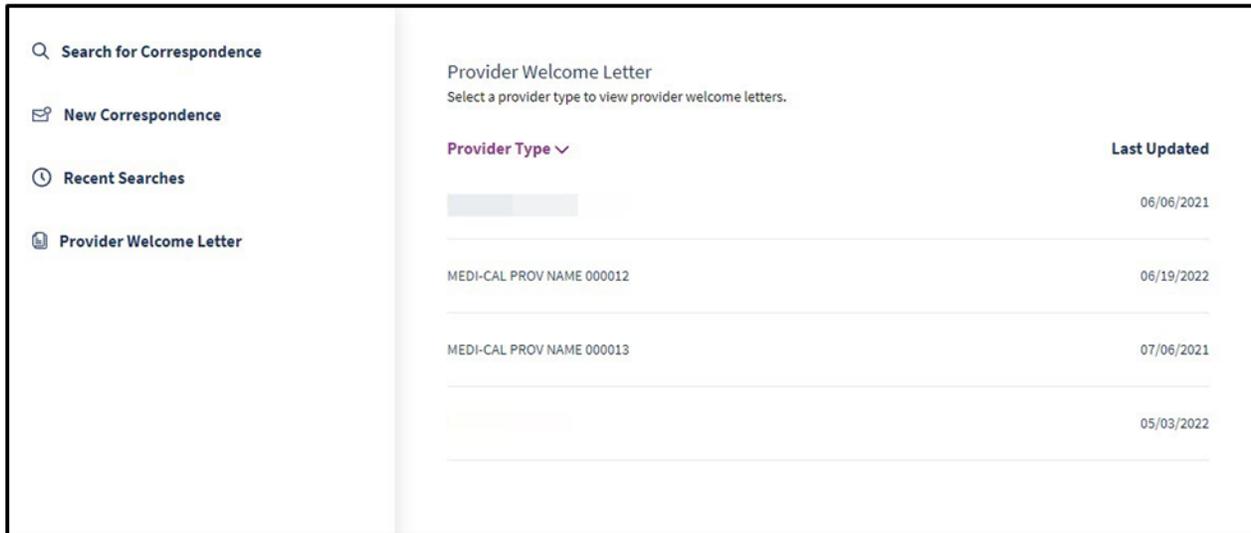


Figure 7.1: Provider Welcome Letter selected from the Communication Center tile.

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2. **Provider Welcome letters** for NPIs assigned to that provider community appear. Select the desired letter.



Name ▾	NPI	Service Location	Date
 Provider Welcome Letter		266 A JQOH AZ	06/06/2021

Figure 7.2: Provider Welcome Letter displayed.

3. A PDF version of the letter appears.



Figure 7.3: PDF version of the Provider Welcome Letter.

Tax Documents

Before accessing the available tax documents for the desired provider community, the **Electronic 1099 Consent Agreement** needs to be read and agreed to.

The screenshot shows a web interface for the 'Electronic 1099 Consent Agreement'. On the left is a navigation sidebar with four items: 'Search for Correspondence' (magnifying glass icon), 'New Correspondence' (envelope icon), 'Recent Searches' (clock icon), and 'Provider Welcome Letter' (document icon). The main content area is titled 'Tax Documents' and features a dark blue header with the text 'Electronic 1099 Consent Agreement' and a 'Not Signed' status indicator. Below the header, the text reads: 'I acknowledge and agree to the following on behalf of my organization:'. This is followed by eight numbered points detailing the terms of the agreement, including electronic receipt of 1099s, withdrawal of consent, and access requirements. At the bottom, there are two buttons: 'I Do Not Agree' and 'I Have Read and Agree to The Above'.

Search for Correspondence

New Correspondence

Recent Searches

Provider Welcome Letter

Tax Documents

Electronic 1099 Consent Agreement Not Signed

I acknowledge and agree to the following on behalf of my organization:

1. You agree to receive all 1099s for your organization electronically and understand you will not receive a paper copy by mail once enrolled in electronic 1099s.
2. DHCS will continue to provide a paper copy by mail if you do not consent to receive electronic 1099s or if you withdraw your consent.
3. Consent may be withdrawn at any time within your Provider Portal account settings.
4. If you wish to receive a paper copy, you may call the Provider Portal Support Line and request that one be sent to you.
5. If your Provider Organization is dis-enrolled from Medi-Cal, an electronic 1099 will not be generated. Any pending 1099s will be delivered via mail to your address on file. Requests to update your address information can be completed by contacting the Telephone Service Center.
6. 1099s will be available for two years, after which they will be removed from Provider Portal. If you wish to receive a copy of a 1099 dated prior to the last two years, you may call the Provider Portal Support Line and request that a copy be mailed to you.
7. To access your 1099s electronically you must have an internet enabled device with access to DHCS Medi-Cal compatible browsers capable of downloading, saving, and printing an Adobe .PDF file. To view the Medi-Cal website compatible browsers, please go to the [Web Tool Box](#).
8. If you withdraw your consent, you will no longer have access to past or future electronic 1099s until you re-enroll and DHCS will resume providing a paper copy for the upcoming fiscal year.

[I Do Not Agree](#)

Figure 8.1: Electronic 10999 Consent Agreement form.

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Next, a list of tax documents will appear.

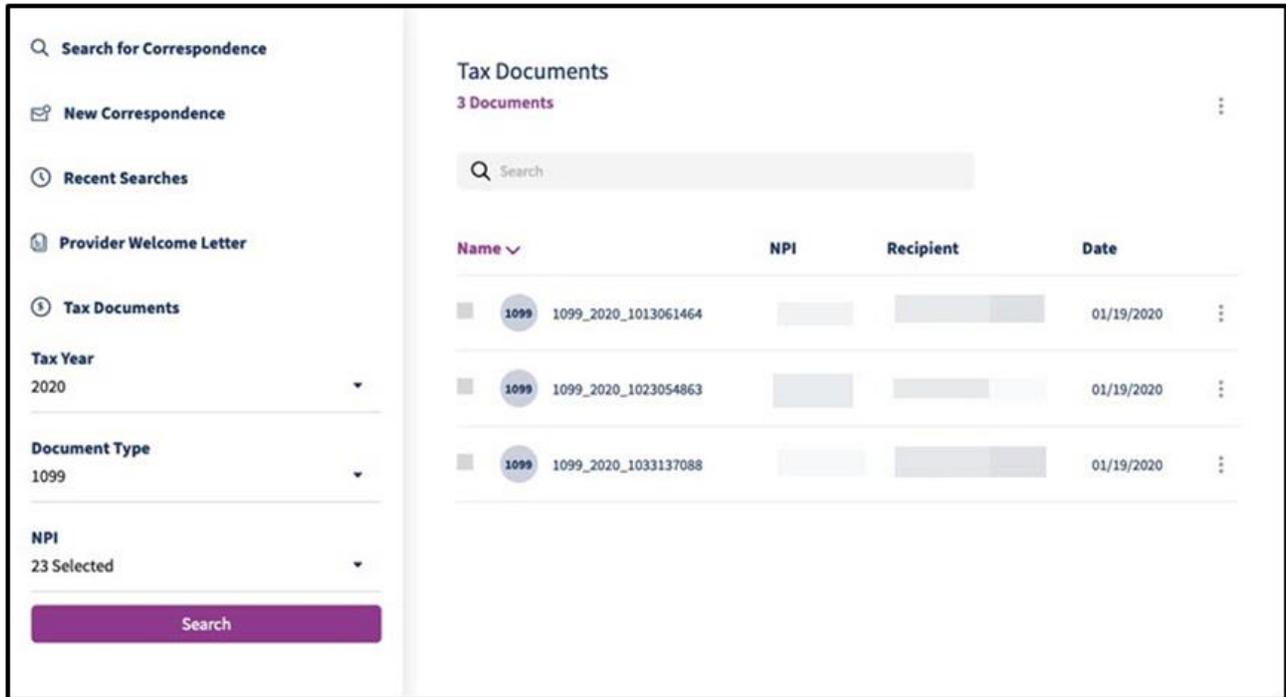


Figure 8.2: A list of tax documents on the Tax Documents screen.

Additional Resources

The Provider Portal contains a number of useful links on the dashboard. Refer to each of the following sections for details.

Transaction Center

A user may access Transaction Services from the Transaction Center in the portal.

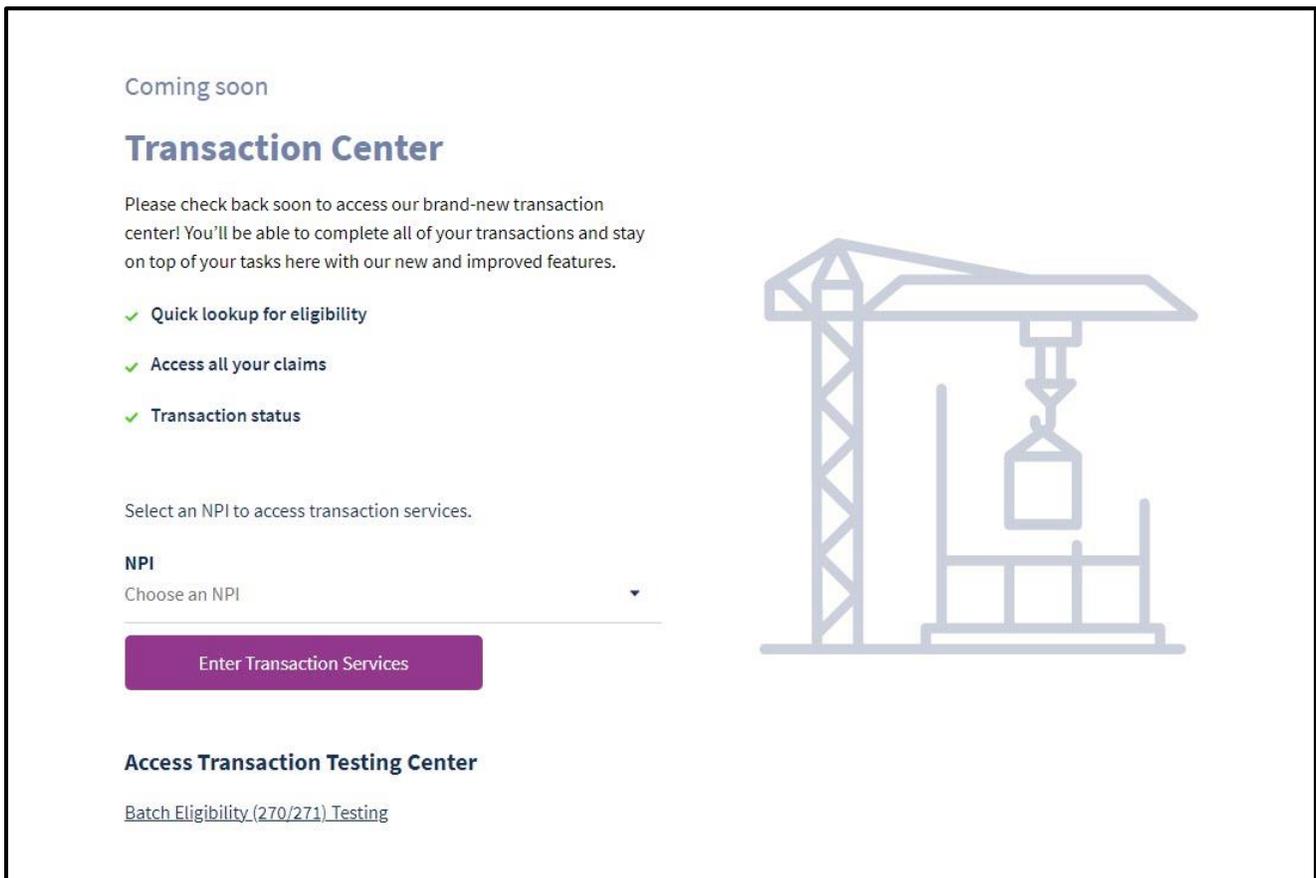


Figure 9.1: Transaction Center coming soon screen.

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From the drop-down menu, select the desired **NPI**.

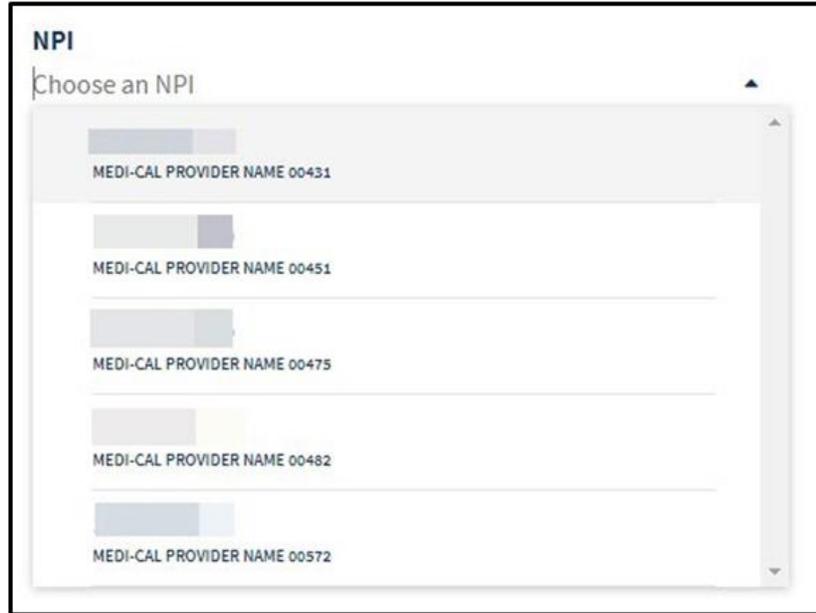


Figure 9.2: Drop-down menu of NPIs.

The user will be directed to **Medi-Cal Transaction Services** to perform secure transactions. The specific transaction options available are based on the provider/submitter enrollment type.

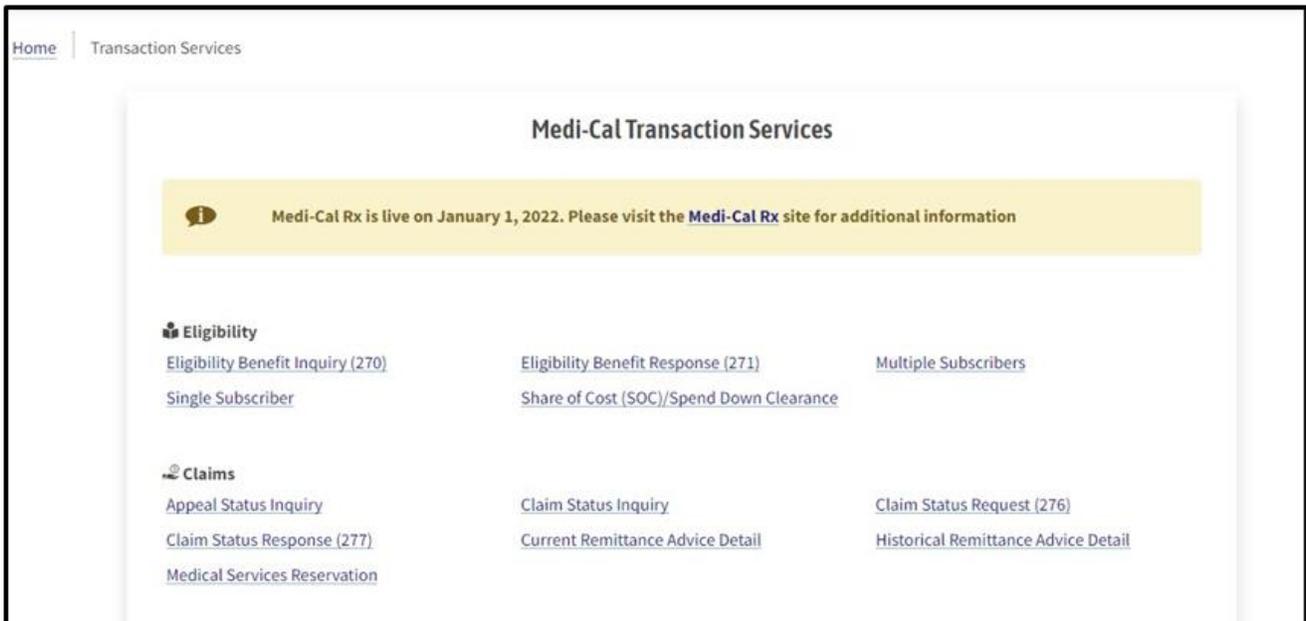


Figure 9.3: Medi-Cal Transaction Services screen.

News and Bulletin

This link automatically directs the user to the Publications area of the Medi-Cal Providers website. Users may view current and archived bulletins, manuals and news articles related to the provider community.

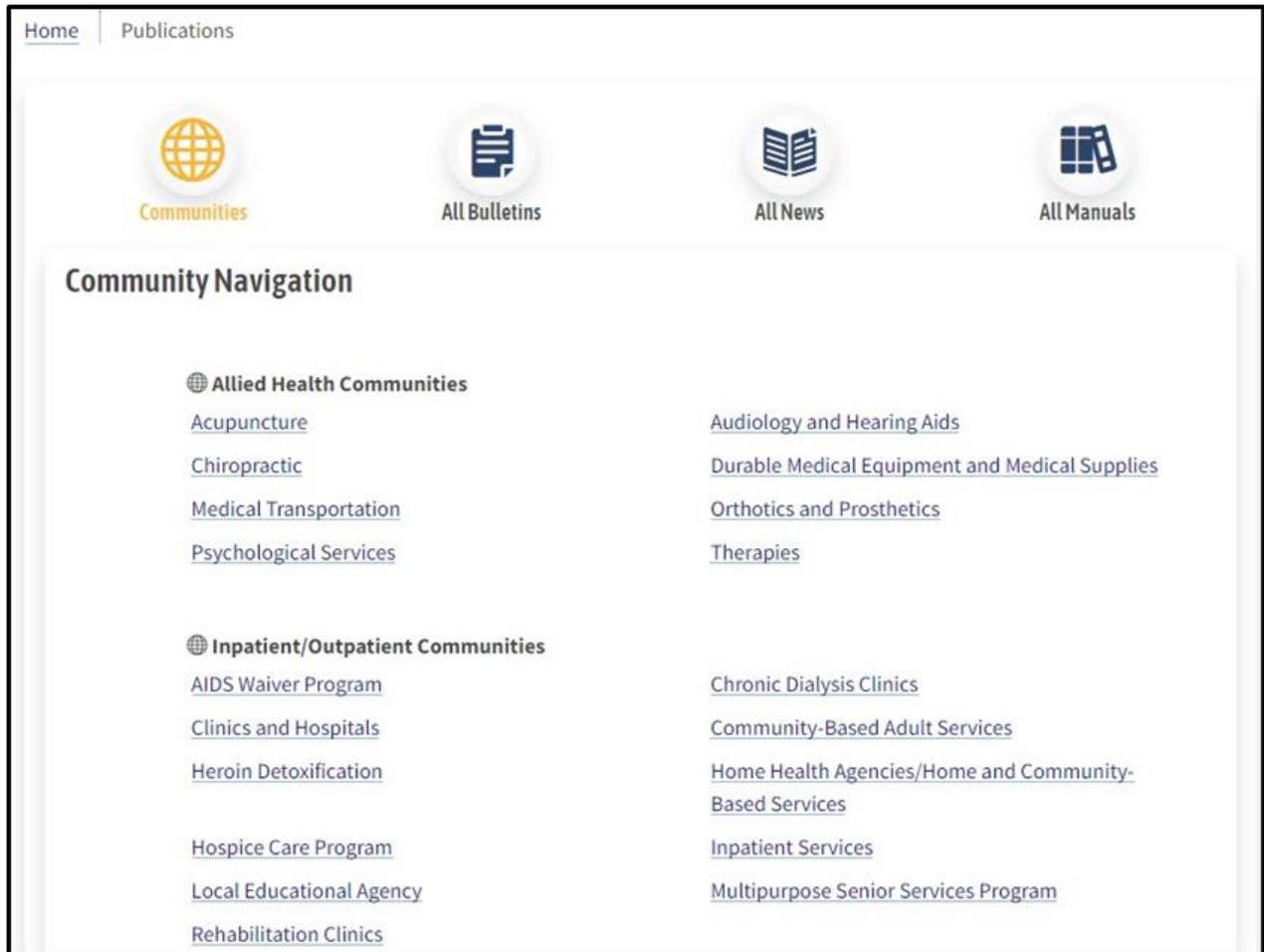


Figure 10.1: The Community Navigation page with Communication tab selected.

Frequently Asked Questions

This Frequently Asked Questions (FAQs) link directs the user to the **Medi-Cal Provider Portal** FAQ page containing an assortment of helpful links to facilitate participation in the Provider Portal.

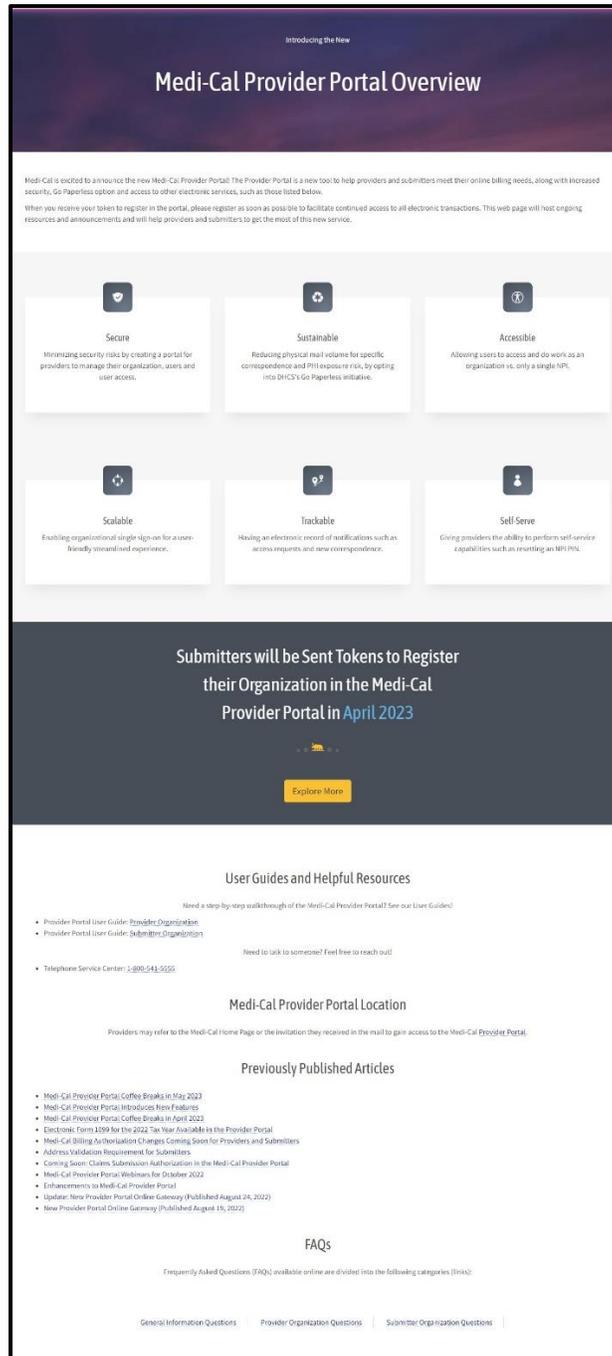


Figure 10.2: The Medi-Cal Provider Portal Overview page.

System Alerts

This link directs the user to the System Status page of the Medi-Cal Providers website. Current system issues or announcements are displayed.

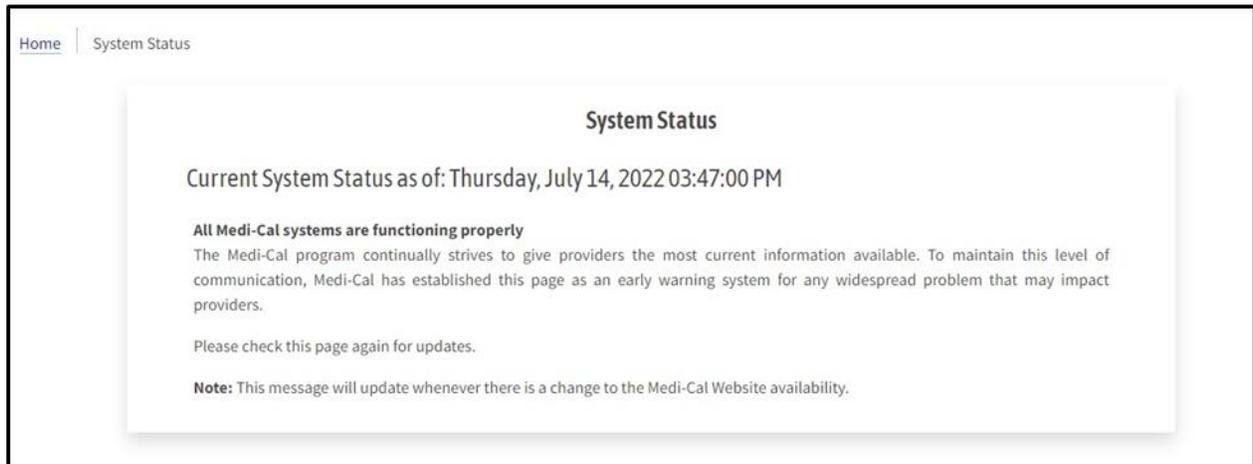


Figure 11.1: System Status page on the Medi-Cal Providers website.

Add a User

Complete the following steps to add a new user:

1. From the homepage, navigate to the Administration tile and select **Add a User**.



Figure 12.1: Administration tile after selecting **Add a User**.

2. Enter the user's Email Address, First Name, Last Name, Mobile Number and Business Number then select **Next**.

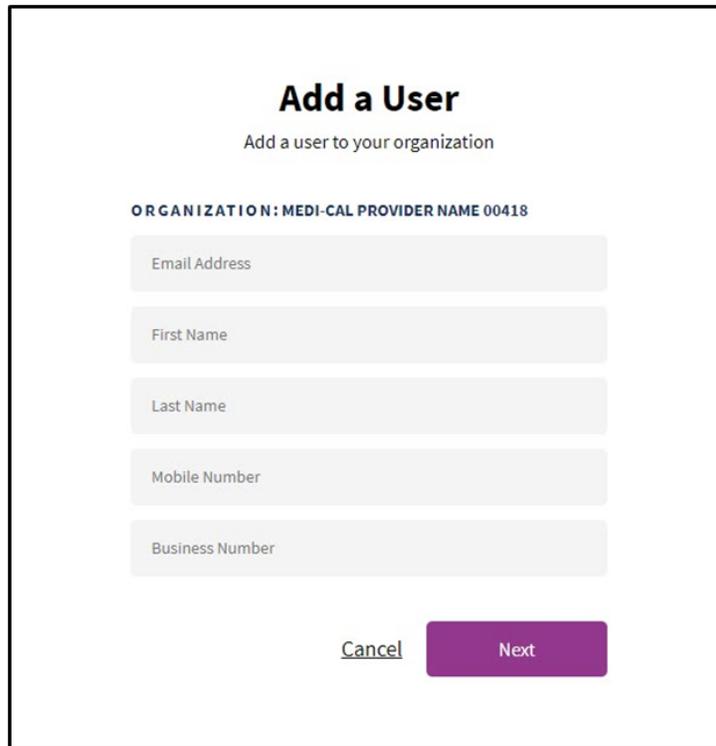
A screenshot of the 'Add a User' form. The form has a white background and a thin black border. At the top center, the title 'Add a User' is in a large, bold, dark blue font. Below the title, the subtitle 'Add a user to your organization' is in a smaller, dark blue font. Below the subtitle, the text 'ORGANIZATION: MEDI-CAL PROVIDER NAME 00418' is displayed in a dark blue font. There are five input fields stacked vertically, each with a light gray background and a thin border. The labels for the fields are 'Email Address', 'First Name', 'Last Name', 'Mobile Number', and 'Business Number', all in a dark gray font. At the bottom of the form, there are two buttons: a 'Cancel' button with a dark blue background and white text, and a 'Next' button with a purple background and white text.

Figure 12.2: Add a User tile.

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- Once the new user has been added, a unique link to register with the Provider Portal is emailed to the user. The link contained in the email can only be used once and it **must be used with seven (7) days**. The link expires if not used within 7 days and the Admin will need to initiate a new registration email. The following steps 4 through 11 apply to the new user who was added. **The Admin may skip to step 12 to set up a user's permissions.**



Figure 12.3: Email from DHCS containing a registration link.

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4. Once the link is selected in the registration email, a **System Use Notification** window will appear. Read the System Use Notification, check the “I confirm that I have read and agree to the above,” then select **Next**.

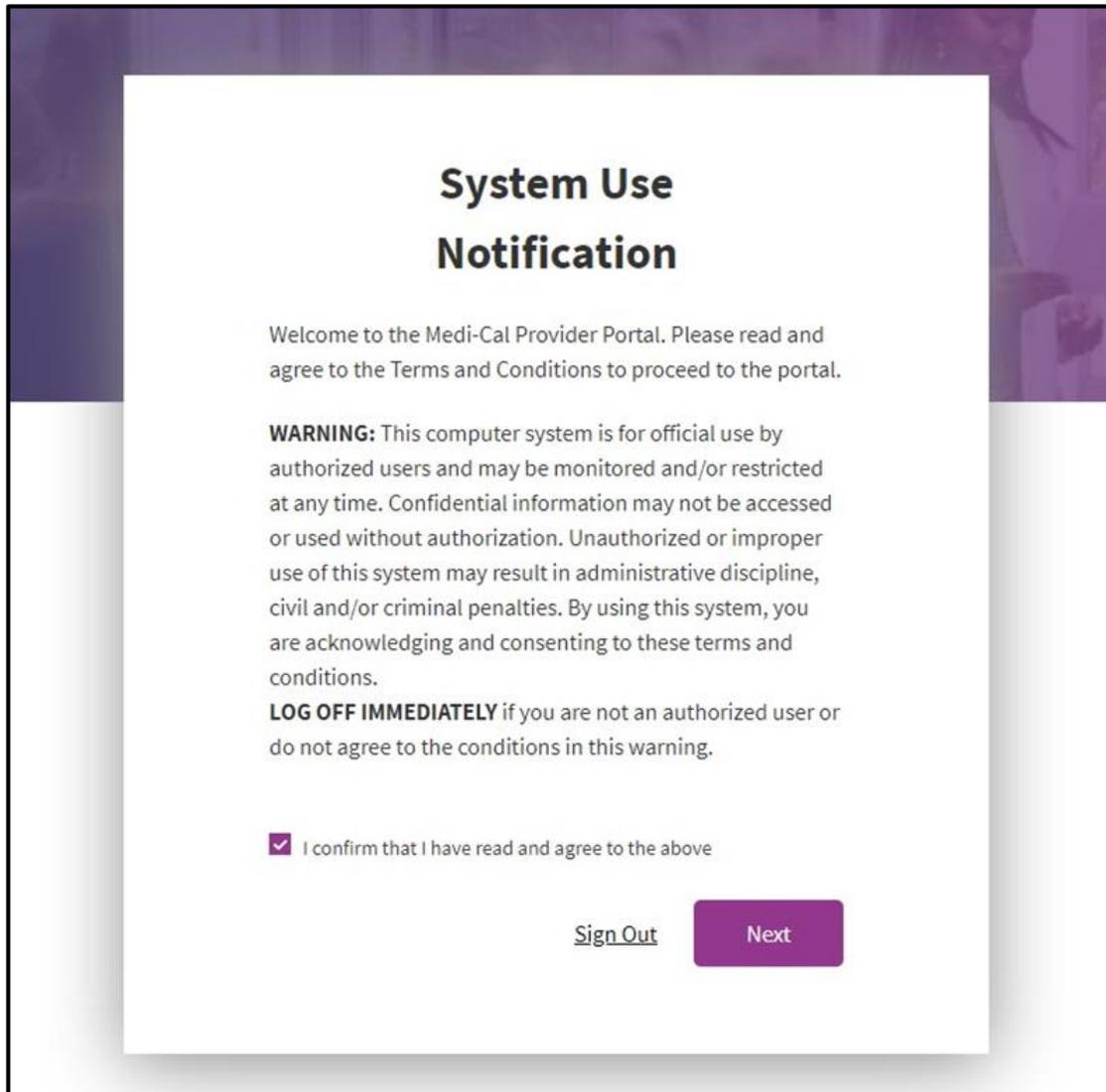
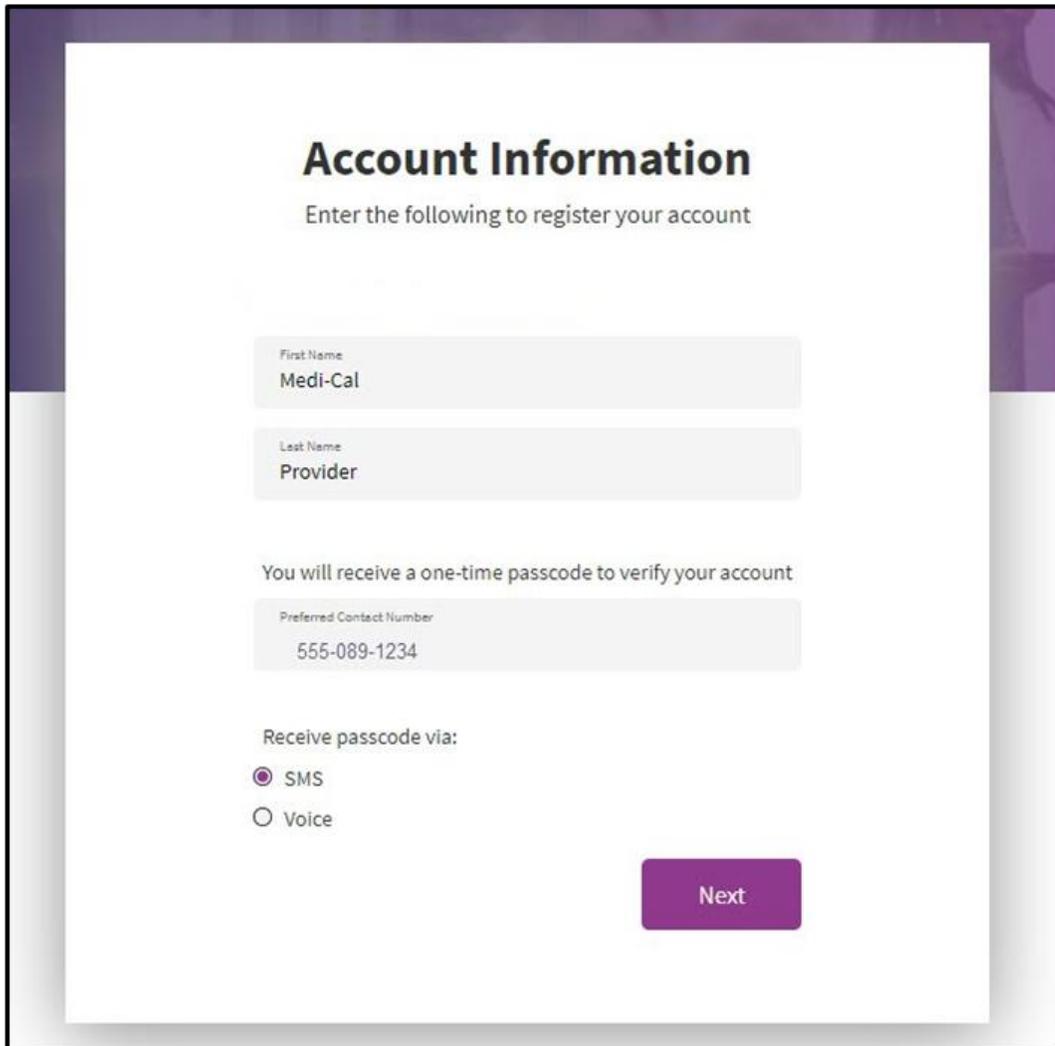


Figure 12.4: The System User Notification window.

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5. Fill out the Account Information screen by populating the First Name, Last Name and Preferred Contact Number. To verify the account, OTP will be sent by either SMS (text) or Voice (call). Select the method and press **Next**.



The screenshot shows a mobile application screen titled "Account Information". Below the title is the instruction "Enter the following to register your account". There are three input fields: "First Name" with the value "Medi-Cal", "Last Name" with the value "Provider", and "Preferred Contact Number" with the value "555-089-1234". Below these fields is the text "You will receive a one-time passcode to verify your account". There are two radio button options: "SMS" (selected) and "Voice". A purple "Next" button is located at the bottom right of the form area.

Figure 12.5: The Account Information screen.

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6. In the OTP, enter the last six digits of the code that was sent and submit **Next**.

Figure 12.6: OTP page.

7. A Registration Complete window will appear.

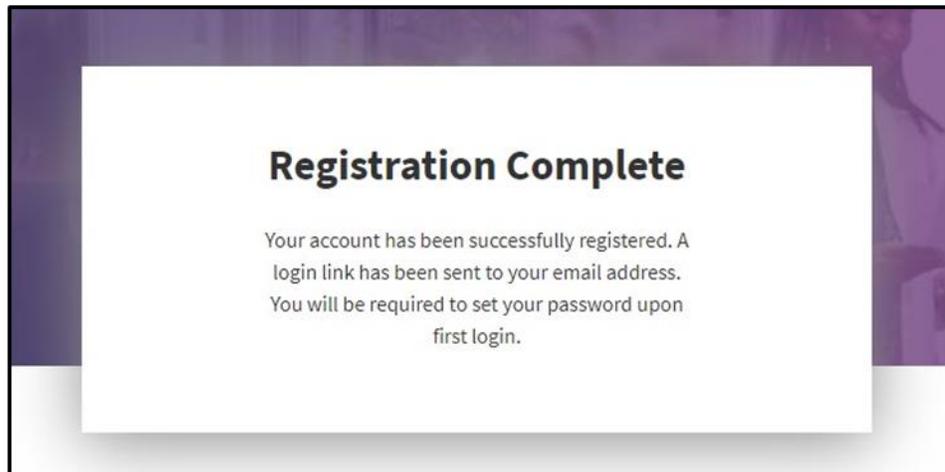


Figure 12.7: Registration Complete window.

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- When the registration is completed, an email will be sent to the user's registered email address to set up a password. The user must select the link in the email **within 30 minutes or it will expire** to continue the registration process.



Figure 12.8: Email from DHCS with a link to set up a password.

- A pop-up window to create a new password will appear. Enter a password that meets the password criteria and select **Submit**.

Note: The password must be a minimum of 15 characters, contain at least one uppercase, lowercase, a number and a special character. It cannot be the same or similar to the previous 5 passwords.

The image shows a web form titled "Create New Medi-Cal Password". It has a yellow input field for "New Password" with a password strength indicator (dots) and an eye icon. Below the field are two green checkmarks: "Minimum of 15 characters" and "Must include at least one: uppercase character, lowercase character, number, and special character (e.g. !\$#%)". There is also a red X icon with the text "Cannot reuse a recently used password". Below these is a grey input field for "Re-Enter Password". At the bottom left is a link "View Password Requirements" and at the bottom right is a purple "Submit" button.

Figure 12.9: Create a New Medi-Cal Password page.

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10. The new user is now successfully registered and may log into their account at any time.

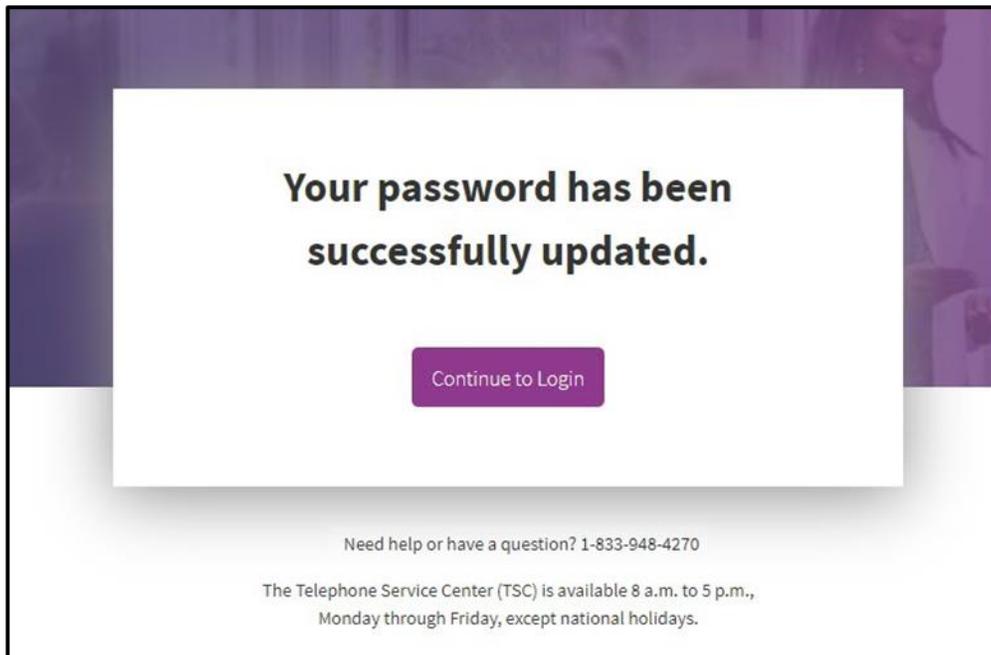


Figure 12.10: The Password has been successfully updated window.

11. Next step is the option of setting up the user's permissions now or at a later time. If **Skip For Now** is selected, the user will have very limited access to the organization. Their permissions can be updated at another time (refer to the "Update User Information/Permissions" section). Select the option **Assign Now** to begin selecting permissions.

Note: If permissions are never assigned, eventually the user will be deactivated and the Admin will need to reactive the user.

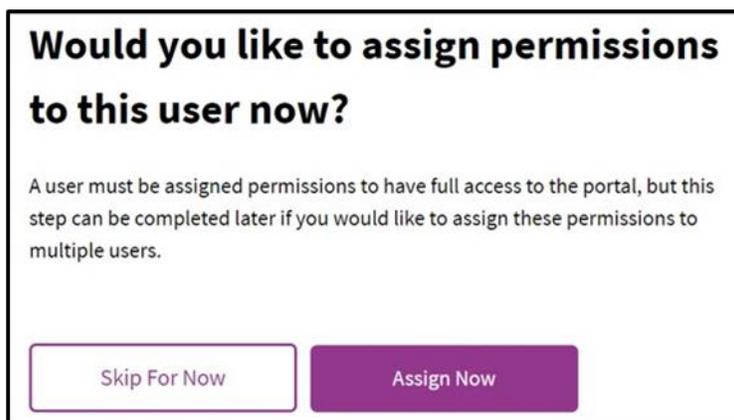


Figure 12.11: Select the **Assign Now** option to begin selecting permissions.

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12. The first step is to **Assign NPI Permissions (Required)**. Select one of the following level of permissions for each NPI:

- **Admin:** Users with an NPI role of administrator will have access to view and reset NPI PINs and view tax documents and correspondence that has been granted to them by their Organization Administrator. They will not have access to add, remove, or modify users if they are not assigned the Organization Administrator role.
- **Processor:** A processor has the ability to receive notifications, search, read and export correspondence.
- **None:** A user will have no access to the NPI; this is the default setting.

Email: [Redacted]
Mobile Phone: [Redacted]
Business Phone: [Redacted]

M MEDI-CAL PROVIDER NAME 00417

Step 1

Assign NPI Permissions (Required)

Assign this user to NPIs within this organization, and select permission levels. If the user is an organization admin, they have automatically been given full permissions to all NPIs. All NPIs do not have to be assigned.

Search [Redacted] Quick Assign to All NPis [Dropdown]

All (23) Assigned (0) Unassigned (23)

NPI	Legal Name	Status	Permissions
	MEDI-CAL PROVIDER NAME 00429	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
	MEDI-CAL PROVIDER NAME 00485	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
	MEDI-CAL PROVIDER NAME 00417	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
	MEDI-CAL PROVIDER NAME 00497	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
	MEDI-CAL PROVIDER NAME 00422	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
	MEDI-CAL PROVIDER NAME 00421	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
	MEDI-CAL PROVIDER NAME 00450	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None

Cancel Next

Figure 12.12: Step 1: Assign NPI Permissions screen.

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13. There is also the **Quick Assign to All NPIs** option which allows a user to be assigned all NPIs at a certain permission level. To select this feature, navigate to the drop-down menu and select the permissions level for that user.

The screenshot displays the user profile for a Medi-Cal Provider (NAME 00417) and the 'Assign NPI Permissions (Required)' step. A dropdown menu is open, highlighting the 'Quick Assign to All NPIs' option. Below the menu is a table of NPIs with columns for NPI, Legal Name, Status, and Permissions. The 'None' permission level is selected for all listed NPIs.

Step 1
Assign NPI Permissions (Required)

Assign this user to NPIs within this organization, and select permission levels. If the user is an organization admin, they have automatically been given full permissions to all NPIs. All NPIs do not have to be assigned.

Search

All (23) Assigned (0) Unassigned (23)

NPI	Legal Name	Status	Permissions
[Redacted]	MEDI-CAL PROVIDER NAME 00429	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00485	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00417	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00497	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00422	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None

Figure 12.13: The Quick Assign to All NPIs option on Step 1.

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14. Once the Admin has completed assigning the user's NPI Permissions, select **Next**.

Email: [Redacted]
Mobile Phone: [Redacted]
Business Phone: [Redacted]

M MEDI-CAL PROVIDER NAME 00417

Step 1

Assign NPI Permissions (Required)

Assign this user to NPIs within this organization, and select permission levels. If the user is an organization admin, they have automatically been given full permissions to all NPIs. All NPIs do not have to be assigned.

Search [Redacted] Quick Assign to All NPIs [Dropdown]

All (23) Assigned (0) Unassigned (23)

NPI	Legal Name	Status	Permissions
[Redacted]	MEDI-CAL PROVIDER NAME 00429	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00485	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00417	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00497	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00422	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00421	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None
[Redacted]	MEDI-CAL PROVIDER NAME 00450	Unassigned	<input type="checkbox"/> Admin <input type="checkbox"/> Processor <input checked="" type="checkbox"/> None

Cancel Next ←

Figure 12.14: Select Next on the Assign NPI Permissions screen.

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15. Step 2 is to **Assign Correspondence Permissions**; this step is optional and may be updated later. Correspondence for NPIs only appear in this area if the user is assigned to the NPI.

To assign permissions, select the correspondence permissions to assign and click **Manage Selected** in the top right corner or click **Manage** next to the NPI to assign permissions for a single NPI.

The screenshot displays a web interface for assigning correspondence permissions. At the top, there is a search bar with a magnifying glass icon and the text 'Search', a 'Filter' button with a list icon, and a 'Manage Selected' button. Below this, there are three tabs: 'All (9)' (which is selected and underlined), 'Correspondence Permissions Assigned (0)', and 'Unassigned (9)'. Under the 'All (9)' tab, there is a 'Select All' checkbox. Below the tabs is a table with the following structure:

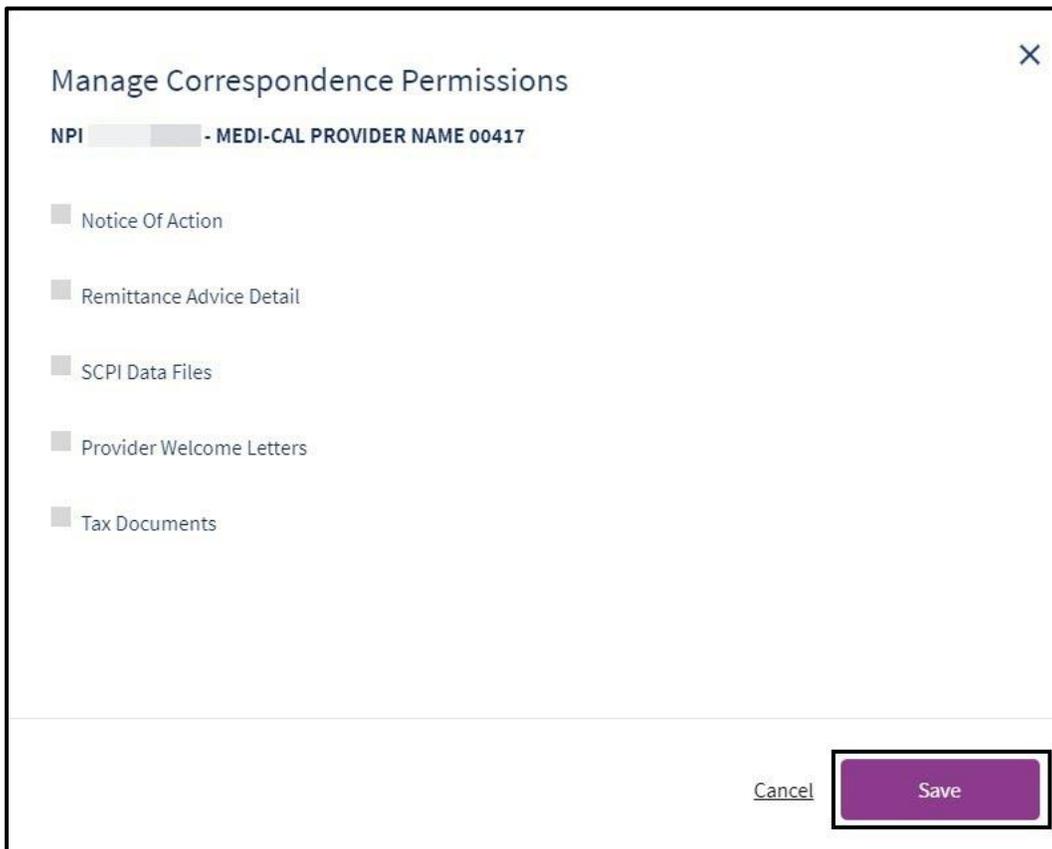
NPI	Legal Name	Correspondence Permissions	
<input checked="" type="checkbox"/>	NPI_NAME	None	Manage
<input type="checkbox"/>	NPI_NAME	None	Manage

Figure 12.15: Step 2: Assign Correspondence Permissions.

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16. From the **Manage Correspondence Permissions** window, choose the applicable correspondence type(s) and select **Save**.



The screenshot shows a window titled "Manage Correspondence Permissions" with a close button (X) in the top right corner. Below the title, the text "NPI [redacted] - MEDI-CAL PROVIDER NAME 00417" is displayed. A list of correspondence types is shown, each with a checkbox:

- Notice Of Action
- Remittance Advice Detail
- SCPI Data Files
- Provider Welcome Letters
- Tax Documents

At the bottom right of the window, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red border.

Figure 12.16: Select **Save** on the Manage Correspondence Permission window.

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17. After selecting Save, the correspondence selected are now listed under **Correspondence Permissions**.

Step 2

Assign Correspondence Permissions (Optional)

Assign this user permissions to view and download selected correspondence types within their assigned NPIs. Users must be assigned to an NPI to have access to correspondence.

Search Filter

All (1) Correspondence Permissions Assigned (1) Unassigned (0)

Select All

NPI	Legal Name	Correspondence Permissions	
[Redacted]	MEDI-CAL PROVIDER NAME 00417	Remittance Advice Detail, Tax Documents +1 more	Manage

Next

Figure 12.17: The Remittance Advice Detail, Tax Documents link on the Assign Correspondence Permission screen.

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18. Step 3 is **Assign Permissions Across Organization** where organization-level user permissions can be assigned to add, remove or modify users. This step is optional and may be completed later. Navigate to the dropdown menu, check Admin, Processor or None. Select **Save and Finish**.

Step 3

Assign Permissions Across Organization (Optional)

Assign an organization permission level to this user.

None

Admin

Processor

✓ None

Administrator will give the user full permissions to all NPIs in the organization and will provide the user with full access to add, edit, delete, and assign permissions to users within this organization. However, this administrator will NOT automatically be assigned correspondence permissions. If this administrator needs to access correspondence, you will need to manually assign correspondence permissions above. **Assign this role with care.**

None will give the user no permissions at an organization level. NPI level permissions can still be set. Most users will fall into this permission level.

→ Save and Finish

Figure 12.18: Step 3: Assign Permissions Across Organization, select **Save and Finish**.

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19. A confirmation page appears containing the new user's information as entered. If any information is incorrect, select **Edit** next to the incorrect field.

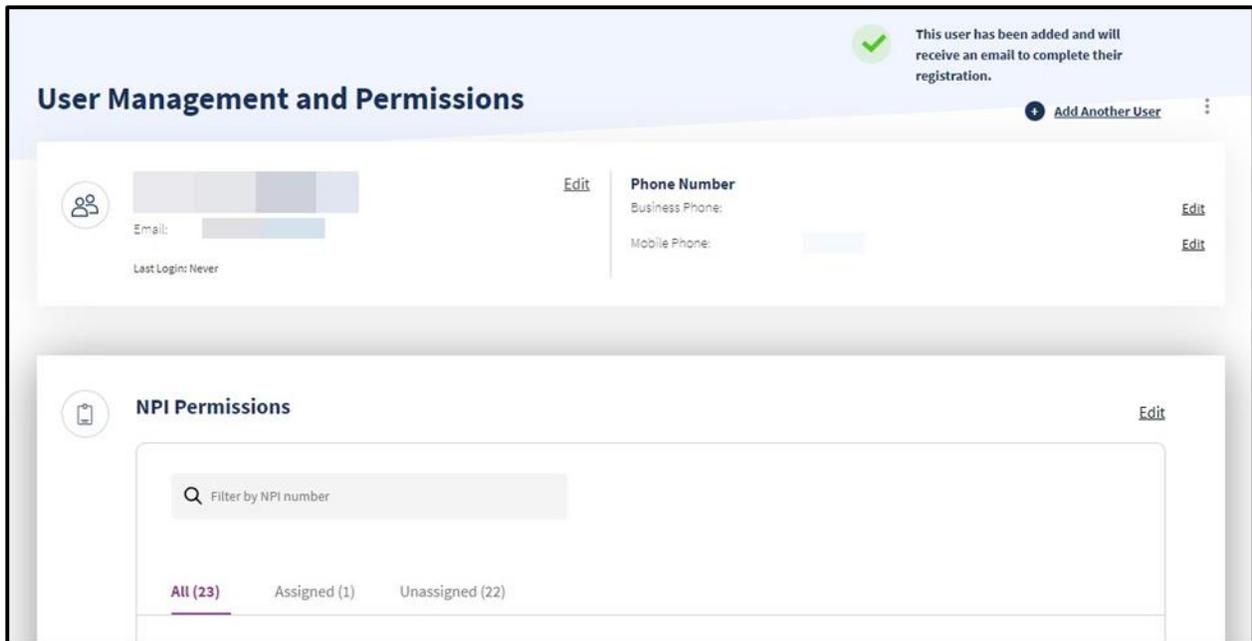


Figure 12.19: The confirmation page containing the new user's information as entered.

Add a new Organization

1. Log in to the Provider Portal and select the **Add or Switch Organization** from the drop-down menu, then select **Add a New Organization**.

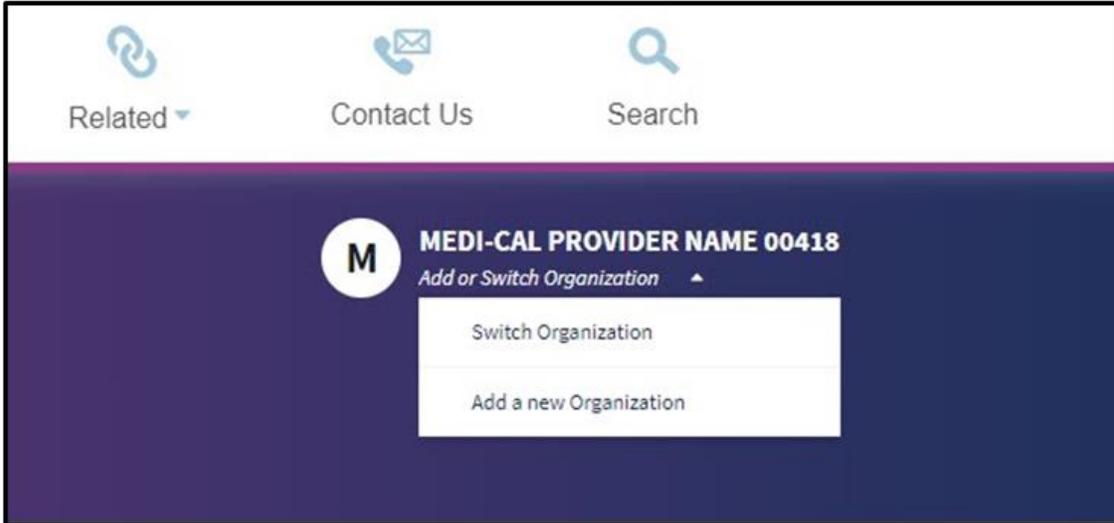


Figure 13.1: The Switch Organization or Add a New Organization options under the drop-down menu.

2. Enter the **Secure Token ID** from the token letter.

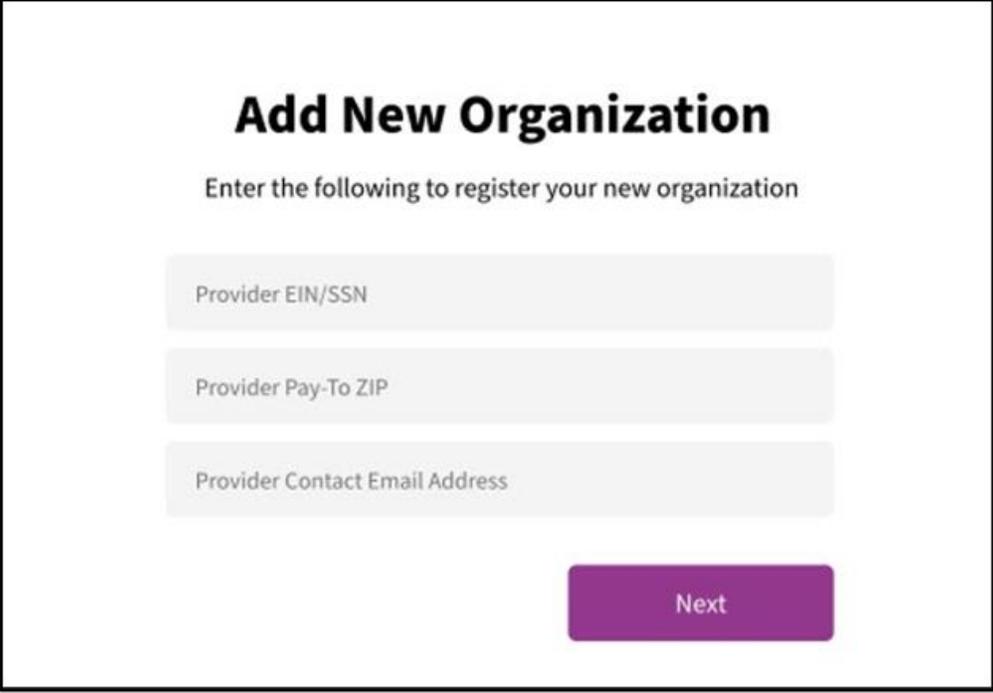
A screenshot of the 'Secure Token ID' input form. The title 'Secure Token ID' is centered at the top in a large, bold, black font. Below the title, there is a paragraph of text: 'If you don't have a token ID, please contact your organization's administrator and they will initiate the registration process.' Below this text is a light gray input field with the placeholder text 'Enter your Secure Token ID'. To the right of the input field is a purple 'Submit' button.

Figure 13.2: Secure Token ID input area.

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3. Enter the Provider EIN/SSN, Provider Pay-To-ZIP and Provider Contact Email Address then select **Next**.



The screenshot shows a web form titled "Add New Organization". Below the title is the instruction "Enter the following to register your new organization". There are three input fields: "Provider EIN/SSN", "Provider Pay-To ZIP", and "Provider Contact Email Address". A purple "Next" button is located at the bottom right of the form area.

Figure 13.3: The Add New Organization window with Provider EIN/SSN, Provider Pay-To-ZIP and Provider Contact Email Address input area.

4. Registration is complete. To view the new organization, log out of the Provider Portal and log back in.

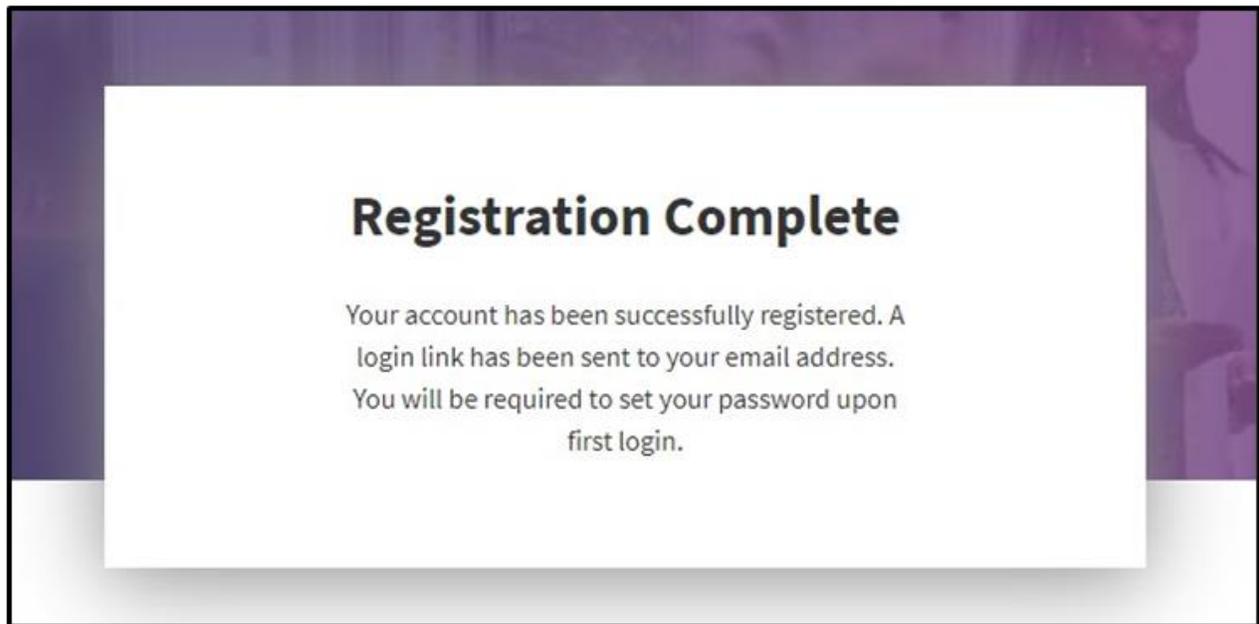


Figure 13.4: The Registration Complete window.

Affiliations

Affiliations are relationships between billing agents and providers. Providers may hire external parties to submit claims to Medi-Cal on behalf of the provider organization. The Department of Health Care Services (DHCS) requires a legal agreement and disclosure of those relationships between the provider and submitter organization(s). Either the provider or submitter may initiate an affiliation request, and each entity must sign a Medi-Cal Telecommunications Provider and Biller Application/Agreement within the Provider Portal application.

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Submitter Requests New Affiliation

Follow the below steps to request a new affiliation to a provider.

1. From the Provider Portal homepage, navigate to the **Provider Network** tile and select **View All**.

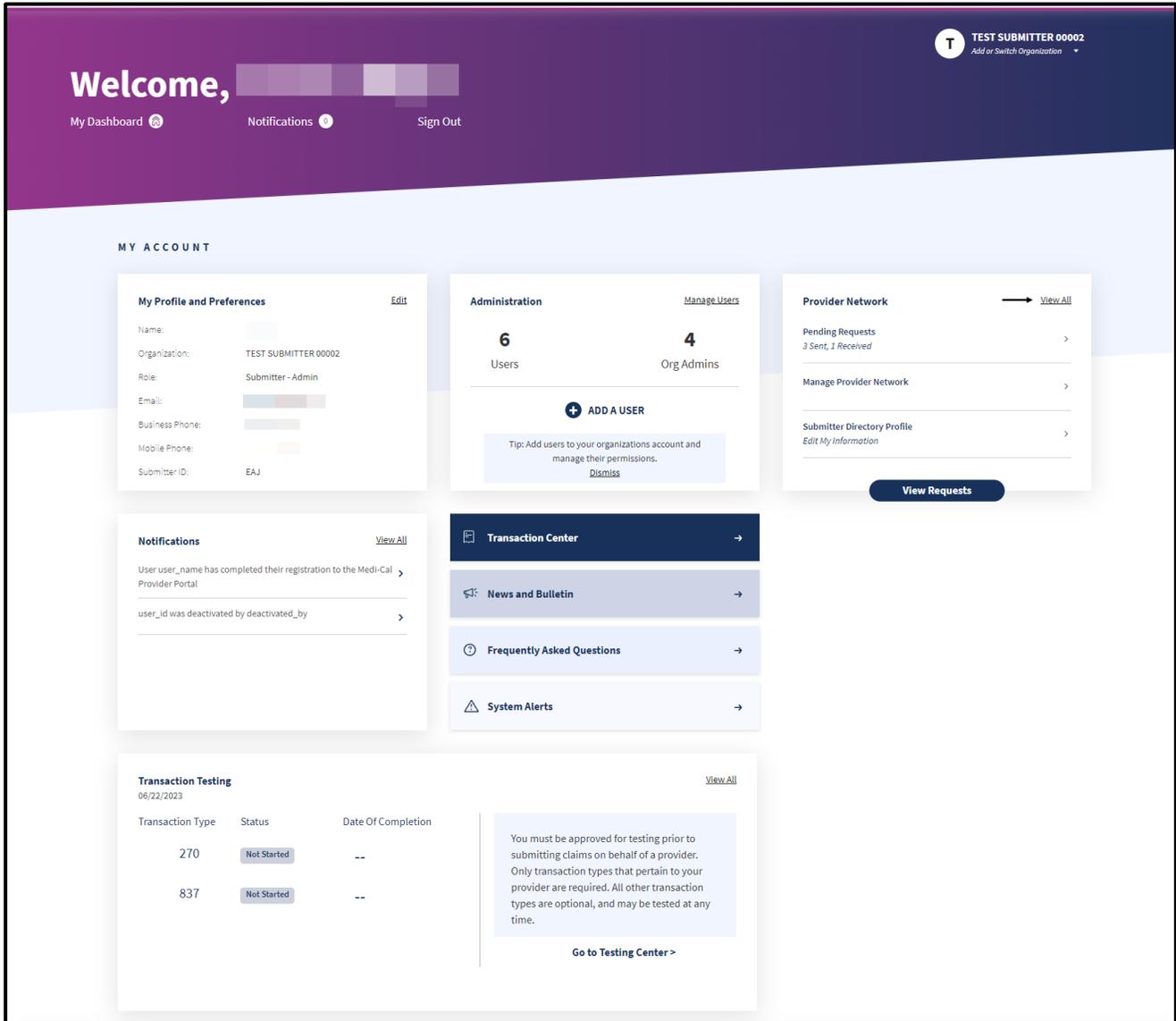


Figure 14.1: Provider Portal homepage.

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2. Navigate to Affiliations and select **New Provider Affiliation Request**.

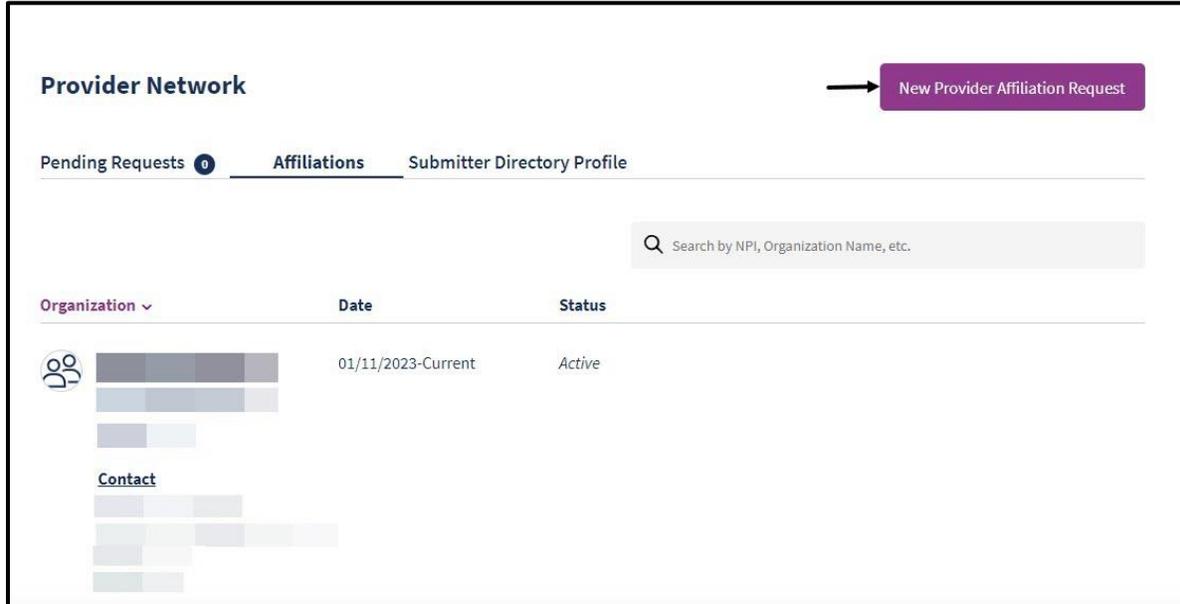


Figure 14.2: New Provider Affiliation Request.

3. Complete the **Organization Information** and select **Next**.

The screenshot shows the 'Organization Information' form. The title 'Organization Information' is centered at the top. Below the title, there is a paragraph: 'Enter the following information to begin the process to affiliate with Medi-Cal provider as a Biller/Submitter organization.' Below this is a section titled 'Affiliated Provider Organization' with a paragraph: 'Affiliation request with a provider organization must be approved by the provider organization. Please enter the provider tax ID and one billing NPI in the provider organization you are seeking affiliation with. The provider organization must be actively enrolled. Please note: entering an NPI is for verification purposes only. The organization admin will assign access to NPIs after approval.' Below this is another paragraph: 'You must attest your authority to agree and that you agree to the affiliation terms and conditions on behalf of your organization.' There are two input fields: 'Provider Tax ID or SSN' and 'NPI'. At the bottom right, there is a purple button labeled 'Next' with an arrow pointing to it.

Figure 14.3: Organization Information form.

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4. Read the Submitter and Provider Affiliation Agreement and check the box confirming that you are eligible to sign this agreement on behalf of your organization. Enter your **First and Last Name**. From the drop-down menu, choose your **Role** then select **Submit Agreement**.

The screenshot shows a web form titled "Submitter + Provider Affiliation Agreement". At the top right, there are two status indicators: "Nicole Hall Not signed" and "Provider Not signed". The main heading is "MEDI-CAL TELECOMMUNICATIONS PROVIDER AND BILLER APPLICATION/AGREEMENT (For electronic claim submission)". The form is divided into several sections: 1.2 BACKGROUND INFORMATION, 2.0 DEFINITIONS, 3.0 CLAIMS ACCEPTANCE AND PROCESSING, and 3.1 CLAIMS CERTIFICATION. At the bottom, there is a checkbox for "I confirm that I am eligible to sign this agreement on behalf of my organization", followed by input fields for "First and Last Name" and "Title". Below these is a line for "Electronic Signature:" and a purple "Submit Agreement" button with a right-pointing arrow.

Figure 14.4: Submitter and Provider Affiliation Agreement.

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5. A **Request Complete** pop-up window will appear stating the account has been successfully registered.

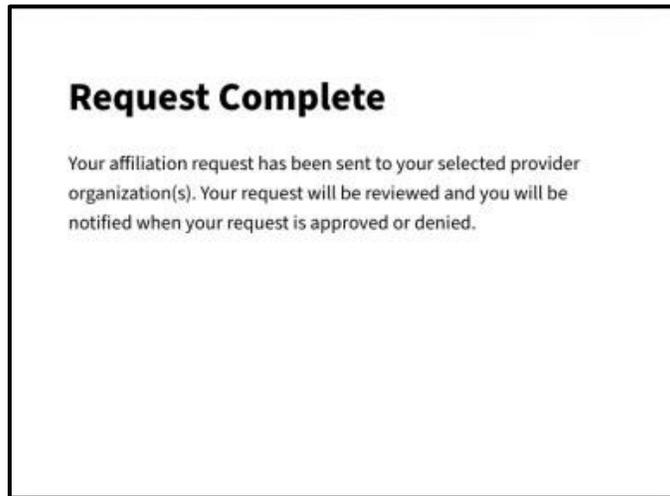


Figure 14.5: Request Complete pop-up window.

6. An email will be sent notifying the user of whether the request was approved or denied.

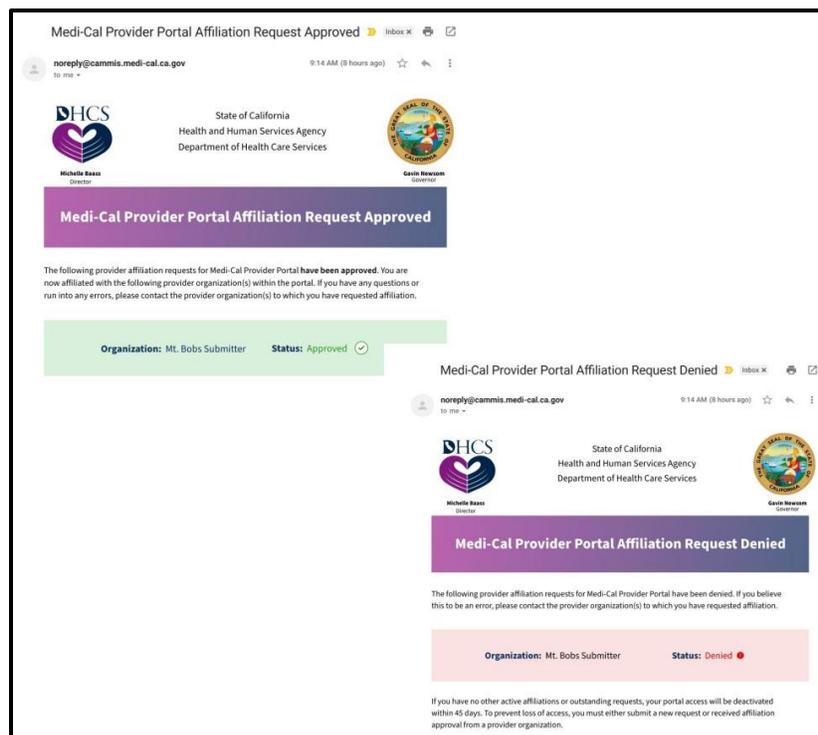


Figure 14.6: Provider Portal affiliation request status email.

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7. Another way to view the status of the affiliation request is to navigate to the **Notifications** tile, which will show whether a request was approved or denied.

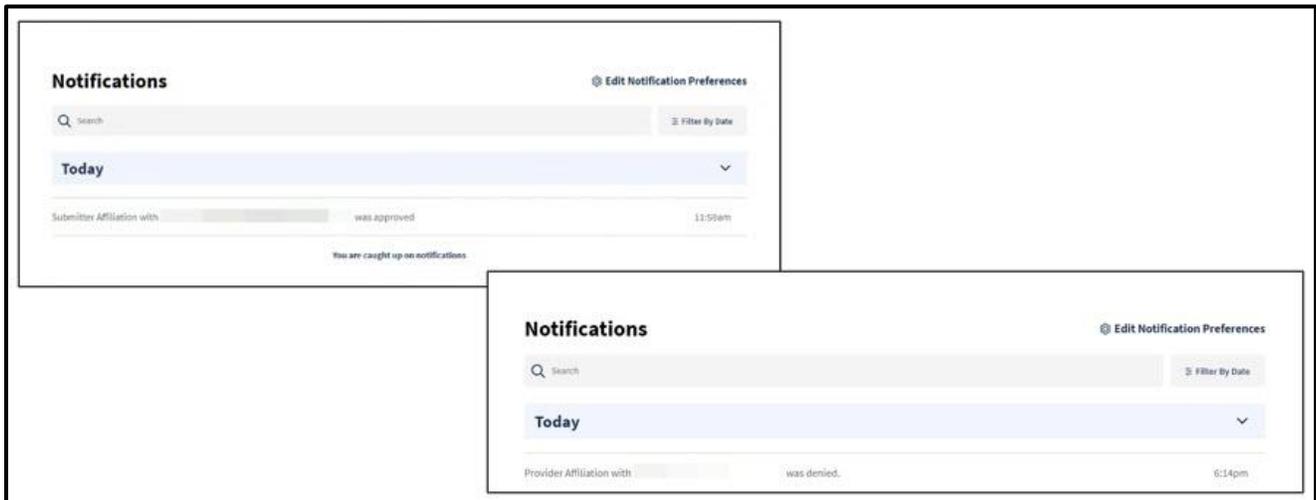


Figure 14.7: Provider Portal affiliation request notification.

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Provider Reviews Affiliation Requests

Follow the steps below to approve/deny a new affiliation to a provider.

1. From the Provider Portal homepage, navigate to **Submitter Management** and select **View All**.

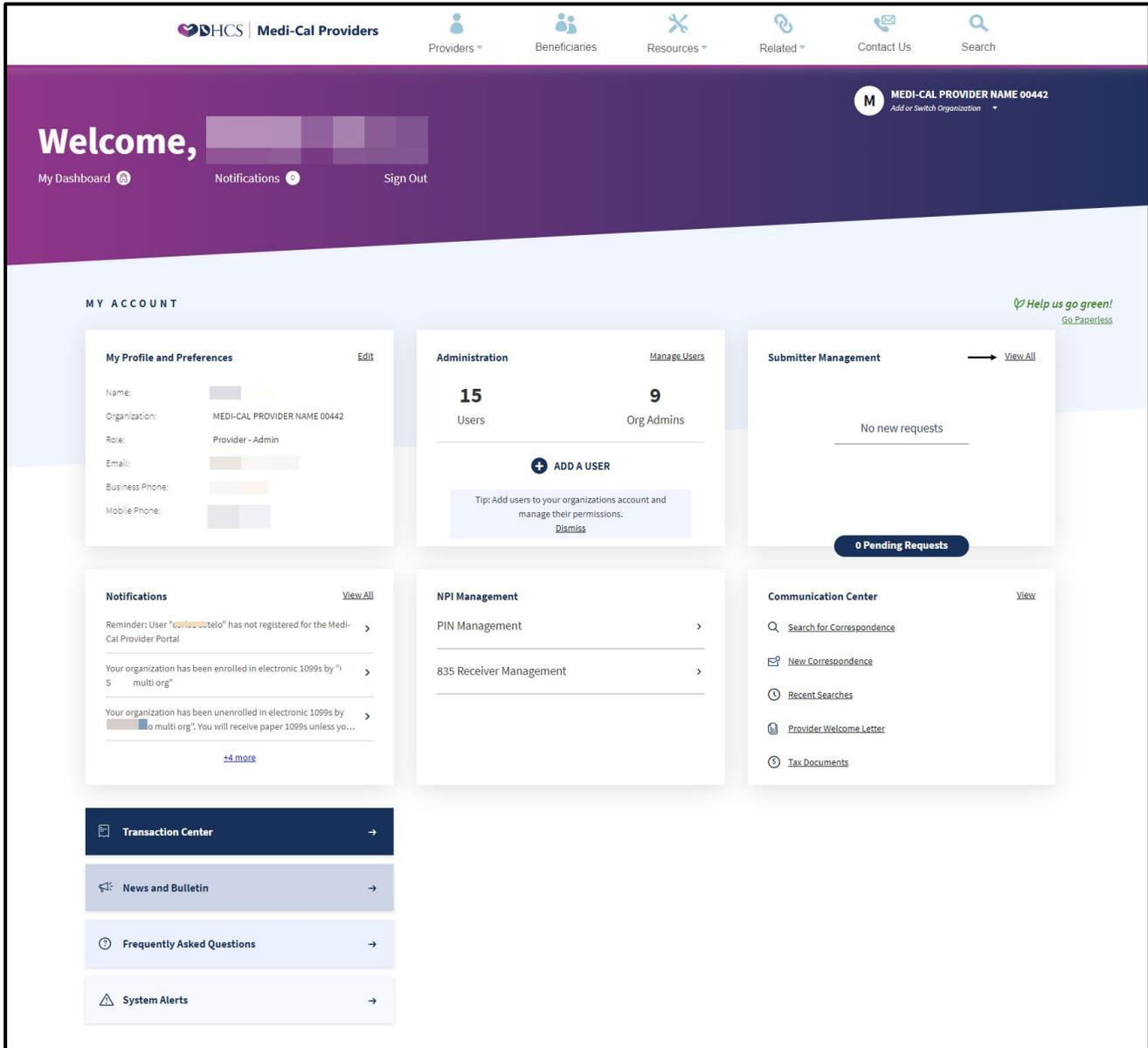
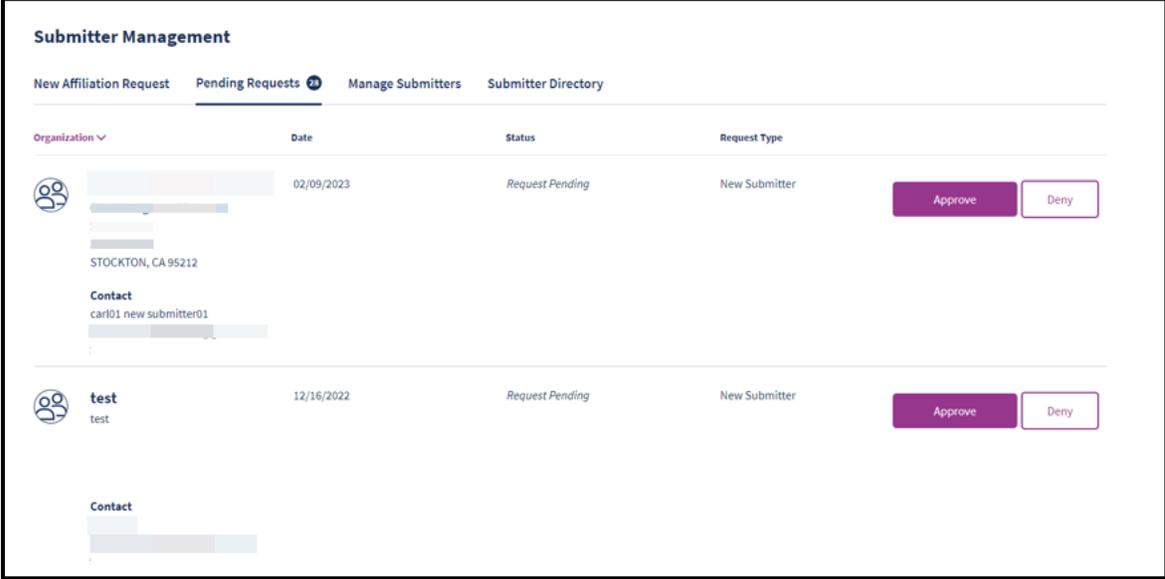


Figure 15.1: Provider Portal homepage.

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2. Navigate to **Pending Requests** and select **Approve**.



The screenshot displays the 'Submitter Management' interface. At the top, there are navigation tabs: 'New Affiliation Request', 'Pending Requests' (which is active and has a notification badge), 'Manage Submitters', and 'Submitter Directory'. Below the tabs is a table with columns for 'Organization', 'Date', 'Status', and 'Request Type'. Two rows of pending requests are visible. The first row shows a request from an organization in Stockton, CA, dated 02/09/2023, with a contact named 'carl01 new submitter01'. The second row shows a test request dated 12/16/2022 with a contact named 'test'. Each row has 'Approve' and 'Deny' buttons.

Organization	Date	Status	Request Type	Actions
[Redacted] STOCKTON, CA 95212 Contact: carl01 new submitter01	02/09/2023	Request Pending	New Submitter	Approve Deny
test Contact: [Redacted]	12/16/2022	Request Pending	New Submitter	Approve Deny

Figure 15.2: Pending affiliation requests.

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3. Read the Submitter and Provider Affiliation Agreement, and then check the box confirming that you are eligible to sign this agreement on behalf of your organization. Enter your **First and Last Name**; then from the drop-down menu choose your **Role** and select **Submit Agreement**.

The screenshot shows a web form titled "Submitter + Provider Affiliation Agreement". At the top right, there are two status indicators: "Nicole Hall Not signed" and "Provider Not signed". The main heading is "MEDI-CAL TELECOMMUNICATIONS PROVIDER AND BILLER APPLICATION/AGREEMENT (For electronic claim submission)". The form is divided into sections: 1.2 BACKGROUND INFORMATION, 2.0 DEFINITIONS, 3.0 CLAIMS ACCEPTANCE AND PROCESSING, and 3.1 CLAIMS CERTIFICATION. At the bottom, there is a checkbox for "I confirm that I am eligible to sign this agreement on behalf of my organization", followed by input fields for "First and Last Name" and "Title". Below these is a line for "Electronic Signature:" and a purple "Submit Agreement" button with a right-pointing arrow.

Figure 15.3: Submitter and Provider Affiliation Agreement.

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- Affiliation requests may also be denied.

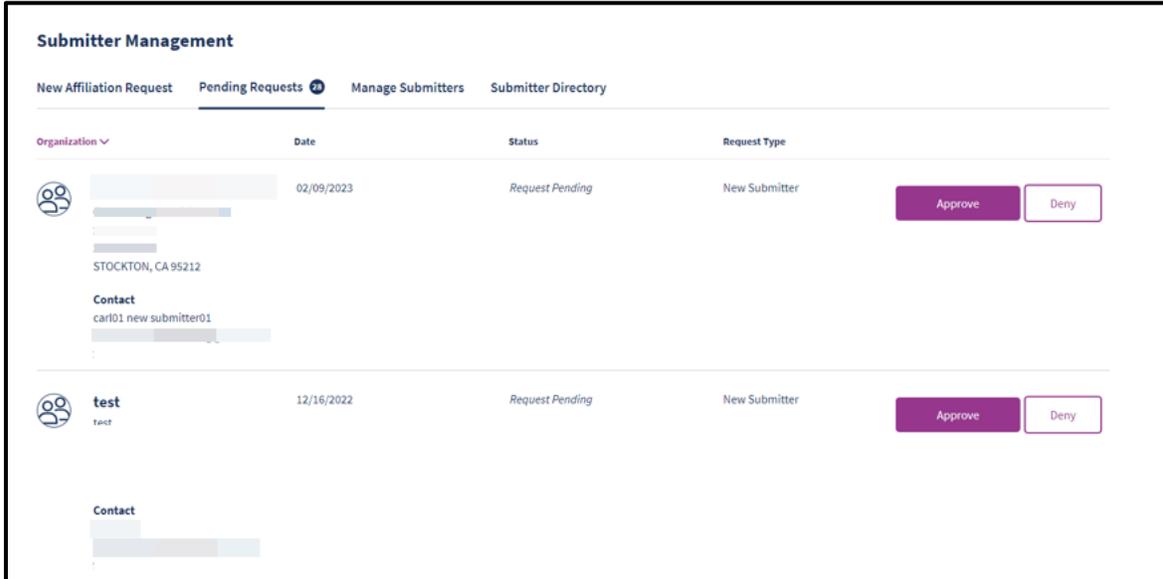


Figure 15.4: Deny affiliation request.

- A prompt will appear asking if you are sure you want to deny this request.



Figure 15.5: Confirmation prompt to deny request.

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Submitter Directory

From the Provider Portal homepage, navigate to Provider Network and select **View All**.

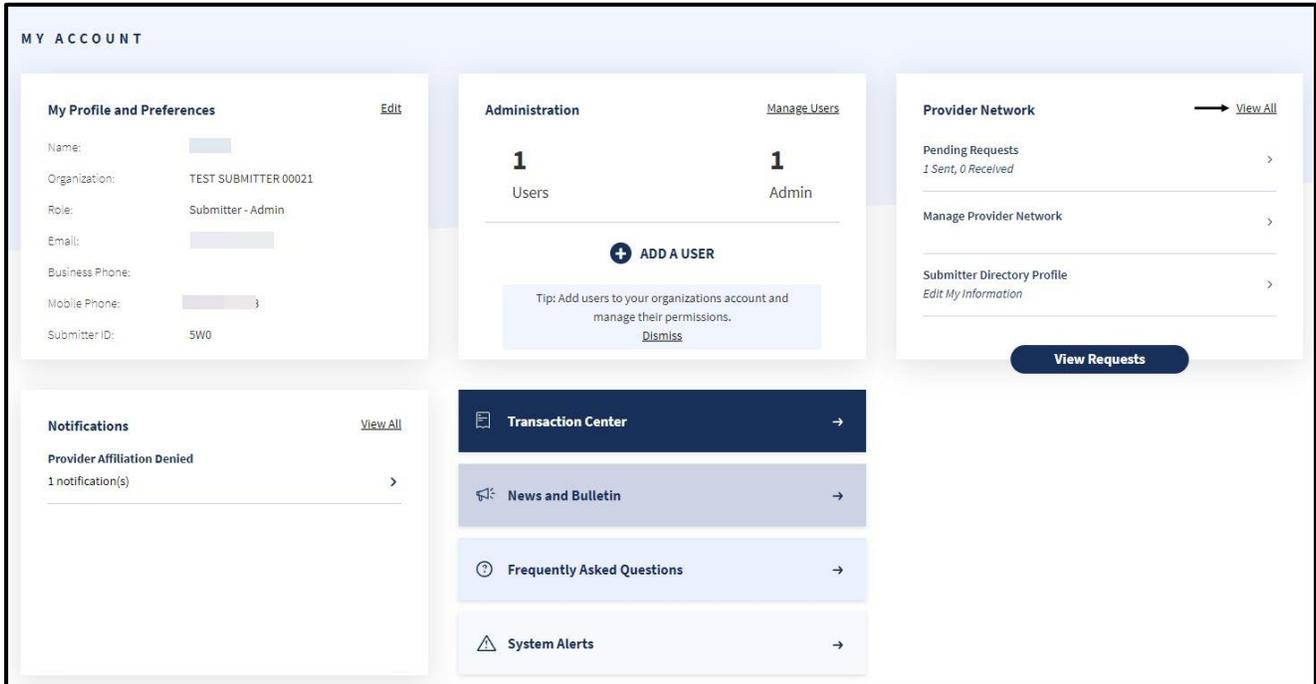


Figure 15.6: Provider Portal homepage

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Under the **Submitter Directory Profile**, the transaction types available to the submitter are shown. If an organization chooses not to be viewable in the Submitter Directory, they can change that setting in My Profile and Preferences.

The screenshot displays the 'Provider Network' interface. At the top right, there is a purple button labeled 'New Provider Affiliation Request'. Below this, navigation tabs include 'Pending Requests' (with a notification icon), 'Affiliations', and 'Submitter Directory Profile' (which is selected). The main content area features a table with columns for 'Organization', 'Submitter ID', 'Transaction Types', and 'Contact Information'. A row for 'TEST SUB ORG NAME 00021' is shown, with a tooltip 'View in Submitter Directory' overlaid on the 'Submitter ID' column. The tooltip text reads: 'Organizations may choose to be viewable or not viewable by editing the Submitter Directory Information through My Profile and Preferences.' Below the organization details, a status message says 'You are currently listed in the submitter directory. Uncheck to opt out.' with a green checkmark icon. At the bottom, a 'Transaction Types' table is visible:

Transaction Types	Submit
837 Institutional	
LTC	<input checked="" type="checkbox"/>
Outpatient	<input checked="" type="checkbox"/>
Inpatient	<input checked="" type="checkbox"/>

Figure 15.7: Submitter Directory Profile

Note: Refer to the Provider Portal User Guide: Provider Organization for information regarding how to complete transaction testing.

Educational Resources

Medi-Cal Learning Portal (MLP)

- Instructor-Led Training (ILT)
- Seminars
- Webinars
 - Live and Recorded

Training Services

- Provider Field Representative
- Small Provider Billing Assistance and Training Program 916-636-1275
- Telephone Service Center (TSC) 1-800-541-5555
 - Billing Questions
 - Provider Enrollment Inquiries
 - Provider Field Representative Referrals