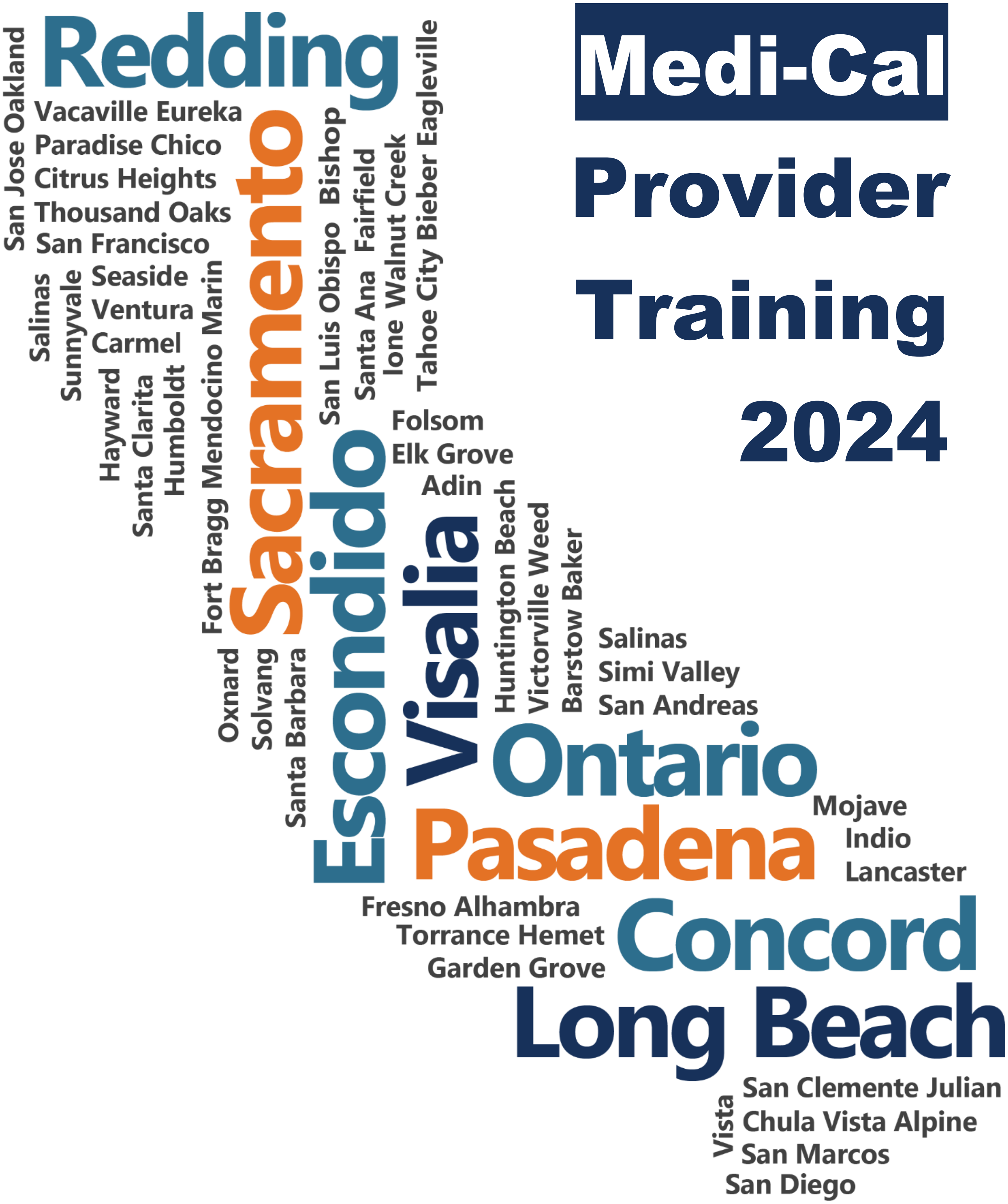
Medi-Cal Provider Training 2024



Navigating the Medi-Cal Provider Portal

CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES

The Outreach and Education services is made up of Provider Field Representatives located throughout California and includes the Small Provider Billing Assistance and Training Program staff, who are available to train and assist providers to efficiently submit their Medi-Cal claims for payment. See the below additional tools and free services available to your provider community.

Medi-Cal Learning Portal (MLP)

Explore the Medi-Cal Learning Portal (MLP) that offers Medi-Cal providers and billers self-paced online training about billing basics, related policies and procedures; new initiatives and any significant changes to the Medi-Cal program.

How can you get started using the MLP?

- First time users must complete a one-time registration at www.learn.medi-cal.ca.gov
- After logging in, you will be able to RSVP for training events or view eLearning courses
- Refer to the Medi-Cal Learning Portal (MLP) Job Aid or the Medi-Cal Learning Portal (MLP) User Guide for detailed instructions

How can you benefit from using the MLP?

- Significantly reduce billing errors by learning billing best practices
- Quizzes that test your knowledge
- Practice your skills using interactive activities

Free Services for Providers

Provider Seminars and Webinars

Provider Training Seminars and Webinars offer basic and advanced billing courses for all provider types. Seminars also offer a free billing assistance called the Claims Assistance Room (CAR). Providers are encouraged to bring their more complex billing issues and receive individual assistance from a Provider Field Representative. The dates and locations for the annual provider training seminars and webinars can be found on the events calendar in the MLP tool and in the News area on www.medi-cal.ca.gov.

Provider Field Representatives

Receive one-on-one assistance from Provider Field Representatives who live and work in cities throughout California. Provider Field Representatives are available to visit providers at their office to assist with billing needs and/or provide custom billing training to office staff.

Small Provider Billing Assistance and Training Program

The Small Provider Billing Assistance and Training Program is one-on-one billing assistance for one year to providers who submit fewer than 100 claim lines per month and would like some extra help. For more information about how to enroll in the Small Provider Billing Assistance and Training Program, call (916) 636-1275 or 1-800-541-5555.

All of the aforementioned services are available to providers at no cost!

Table of Contents

Provider Portal Processor Role

Introduction

Purpose

The purpose of this module is to provide an overview of the Provider Portal website for the Processor role.

Module Objectives

- How to Register.
- 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.

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 the Department of Health Care Services (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 a user's Personal Identification Number (PIN)

How to Register

Processors are registered via an Organizational Administrator (Org Admin) within their organization. Once the Org Admin creates the user account, a registration link is sent. The first contained in the email can only be used once and it must be used within seven (7) days. The link expires if not used within 7 days and the Admin will need to reissue the registration link.

To register follow these steps:

1. Select the link provided in the registration email.

Figure 1.1: Email with registration link provided.

2. The secure token provided from DHCS will automatically populate.

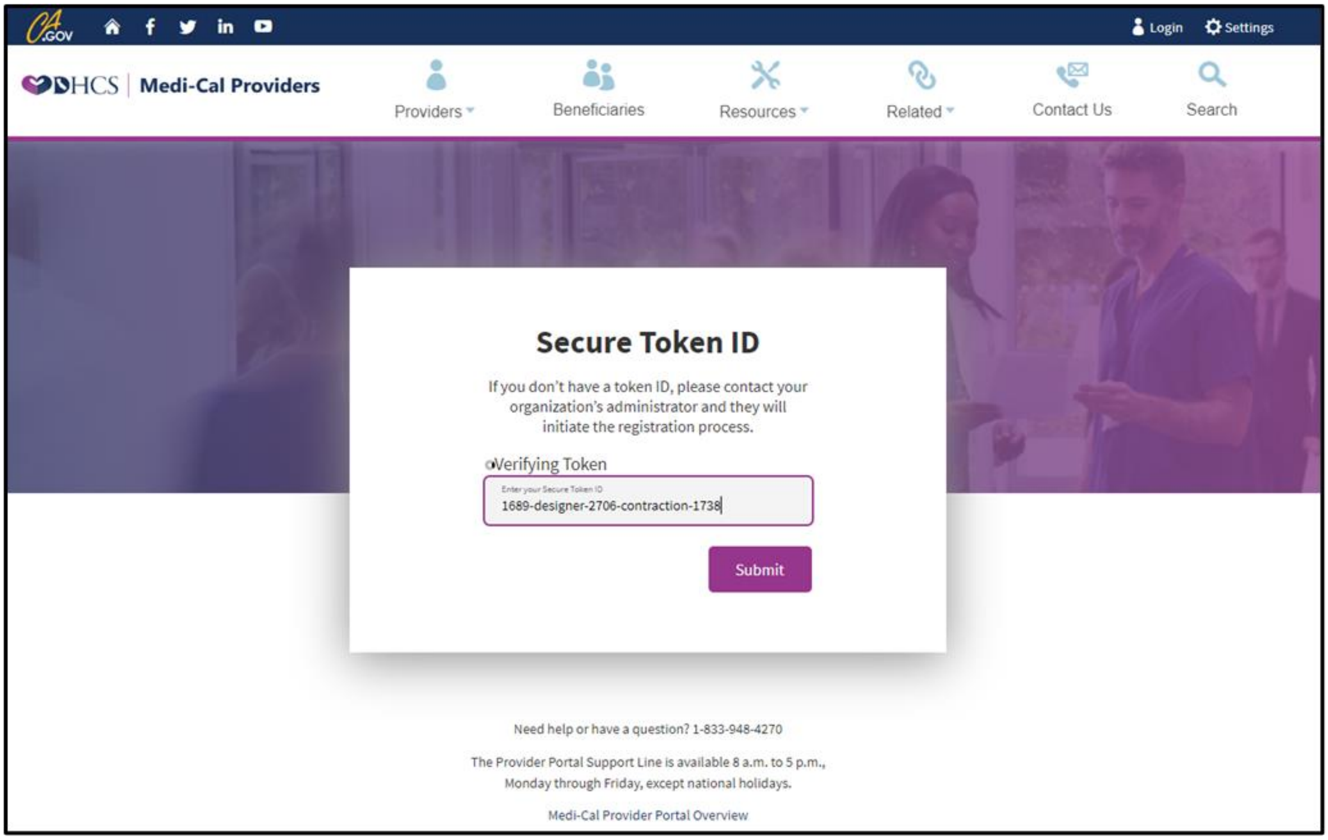


Figure 1.2: Secure Token ID screen.

3. Read the Terms and Conditions, check the **boxes I confirm that I have read and agree to the above and I confirm that I am authorized to create a Medi-Cal Provider Portal account on behalf of my organization.**

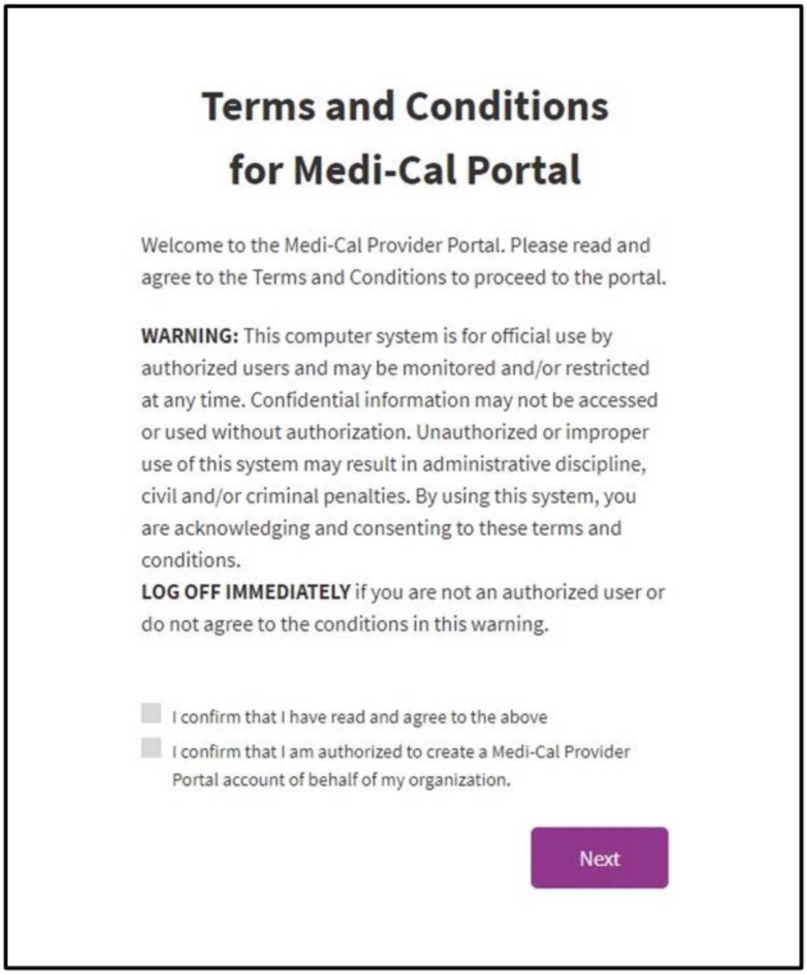


Figure 1.3: Terms and Conditions window.

4. Enter First and Last name as well as Preferred Contact number. A one-time passcode (OTP) will be sent to the preferred contact number via either SMS (text) or Voice (call). Select **Next.**

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

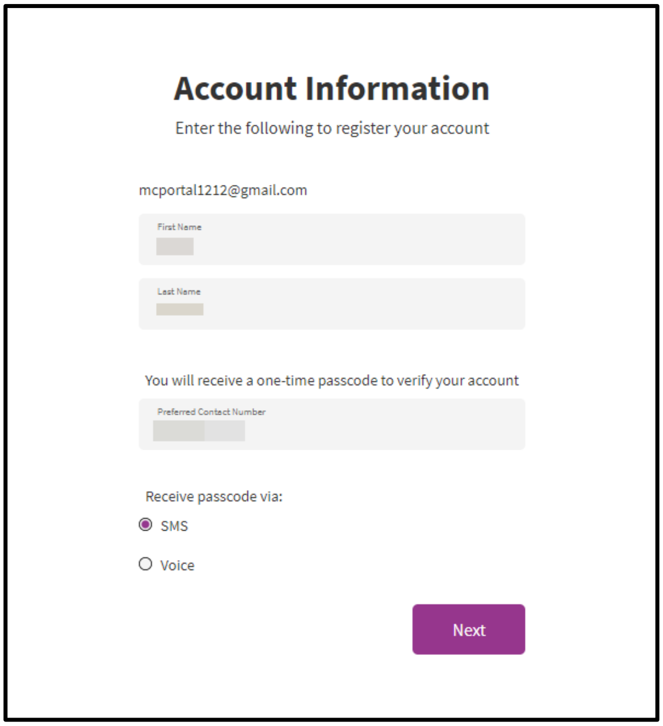


Figure 1.4: Account information screen.

5. Enter the last six digits of the passcode sent.

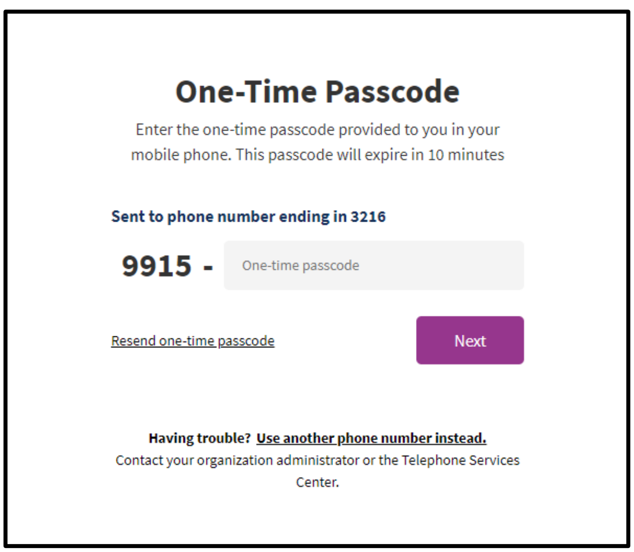


Figure 1.5: OTP input area.

6. A window appears stating Registration is Complete.

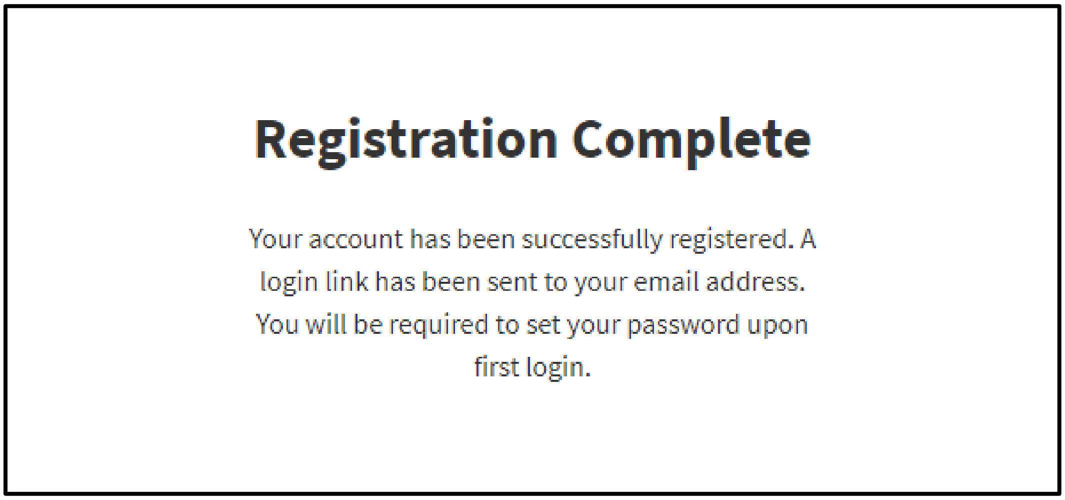


Figure 1.6: Registration Complete window.

7. An email will be sent to the email address indicated during sign up to set up a password. Select the link 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.

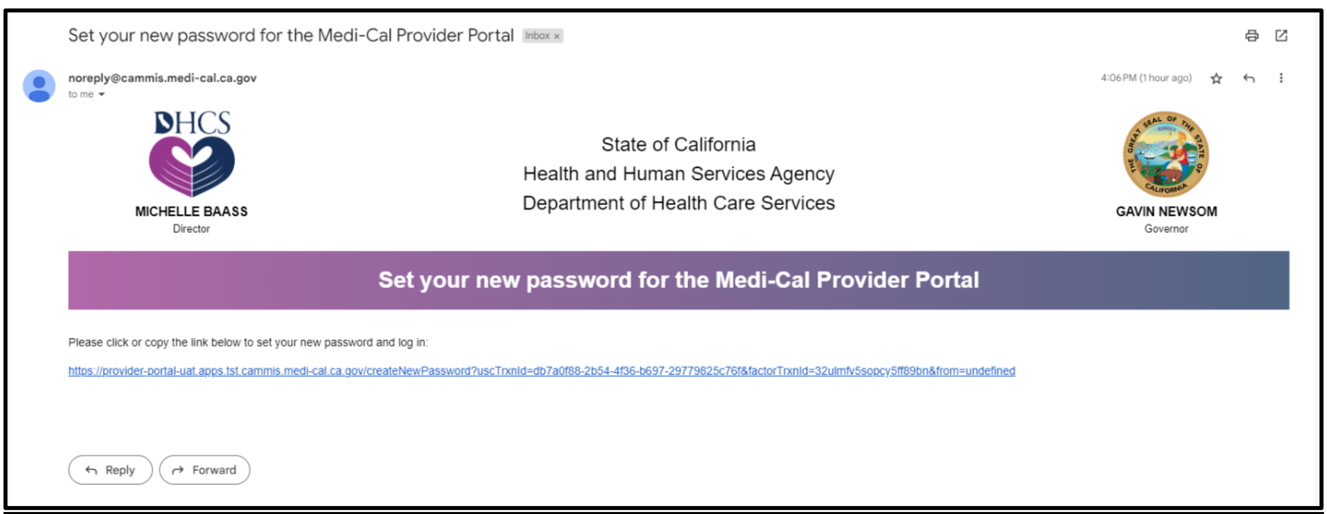


Figure 1.7: Email from DHCS with a link to set up a password.

8. Select either SMS or Voice to receive an OTP.

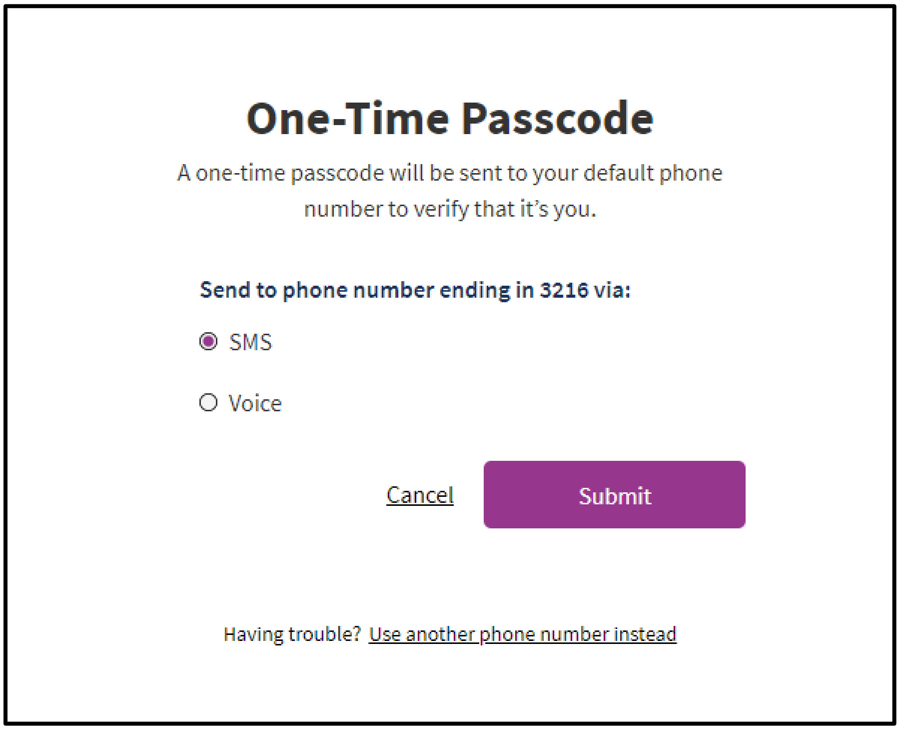


Figure 1.8: OTP verification method area.

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

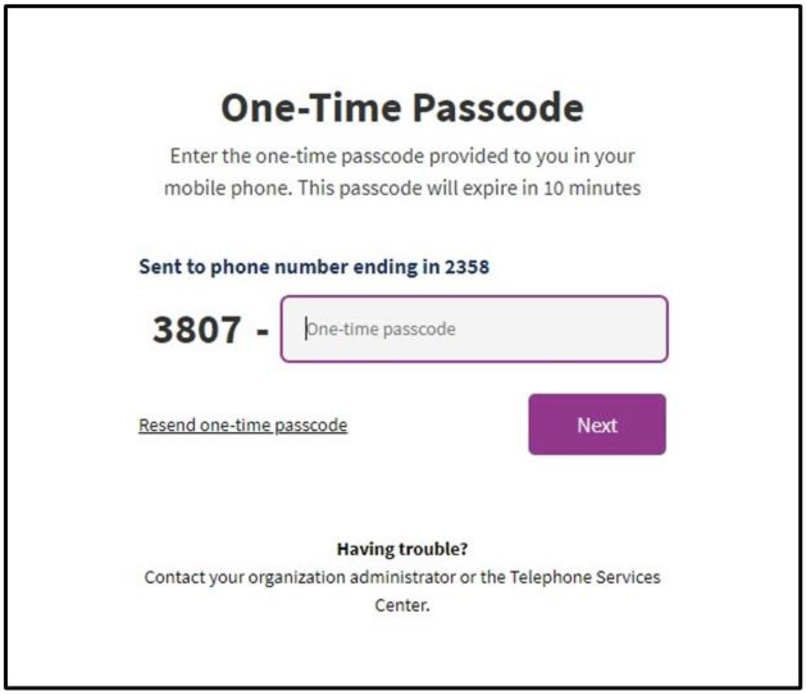


Figure 1.9: OTP input area.

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

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

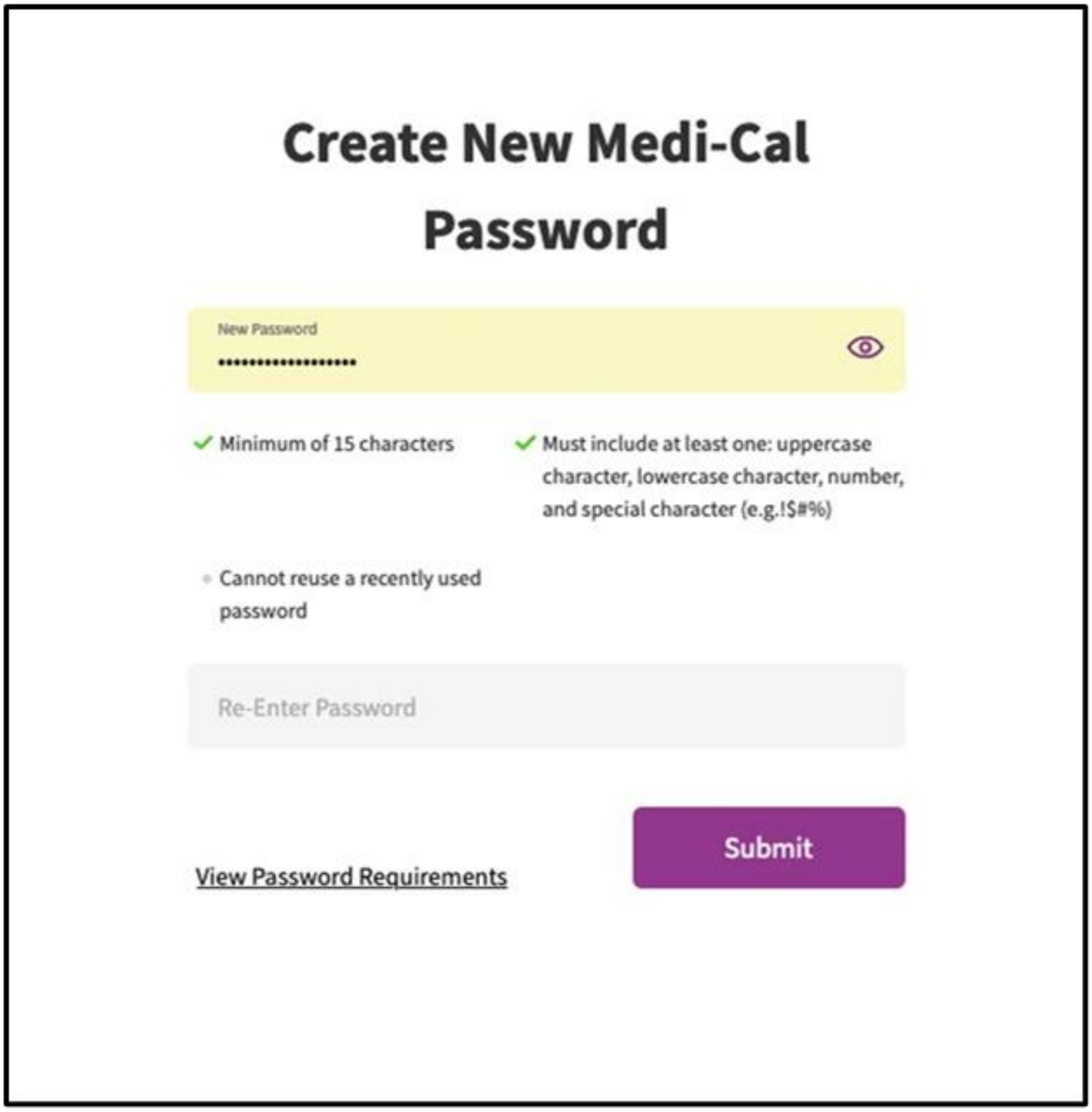


Figure 1.10: Create New Medi-Cal Password pop-up window.

11. A message will display notifying the user that their password has been successfully updated.

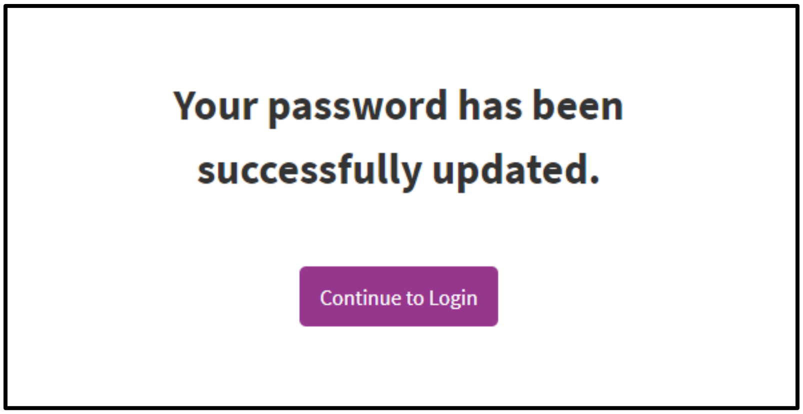


Figure 1.11: Password successfully updated message.

Logging into the Provider Portal

Navigate to the Medi-Cal Provider Portal. Enter the email address and select **Next.**

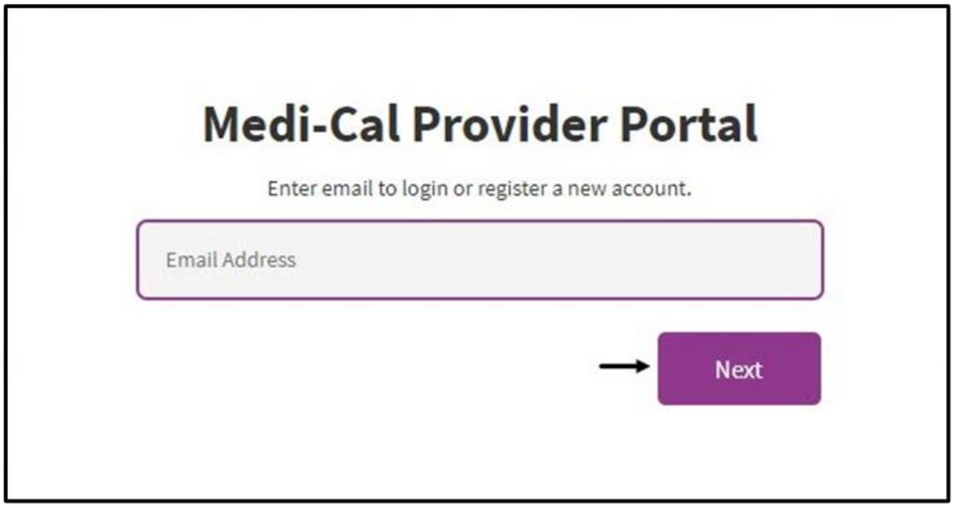


Figure 2.1: Enter email address page to login to Medi-Cal Provider Portal.

On the Provider Portal Login screen, enter the password and select **Log In.**

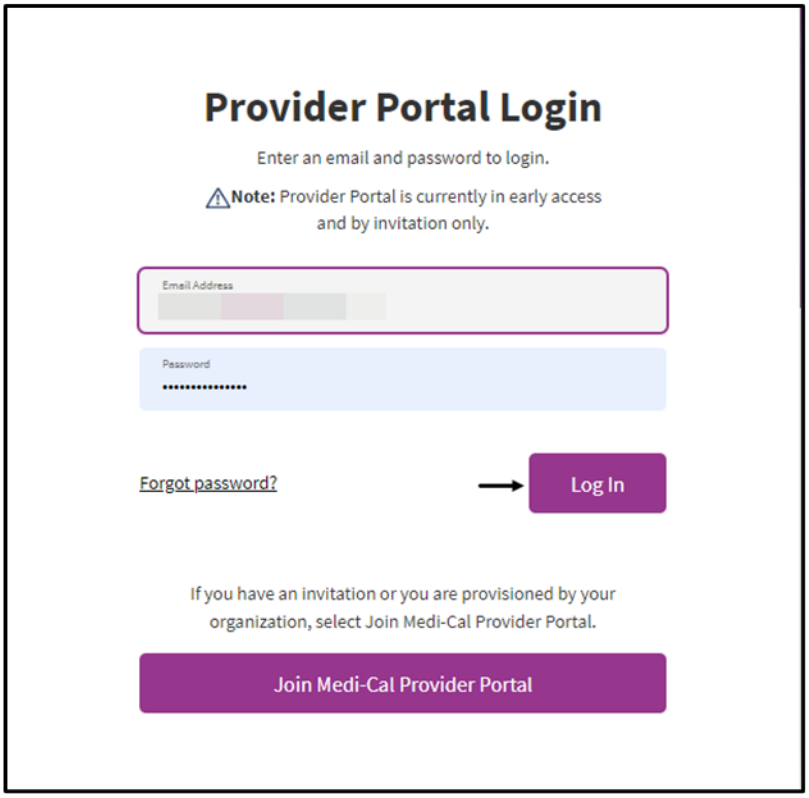


Figure 2.2: Provider Portal Login screen.

If the user that is logging in is a member of several organizations a Select an organization screen will appear. The organizations displayed are determined by an Admin when a user's account is set up. If the user is assigned to a single organization, the Provider Portal homepage appears.

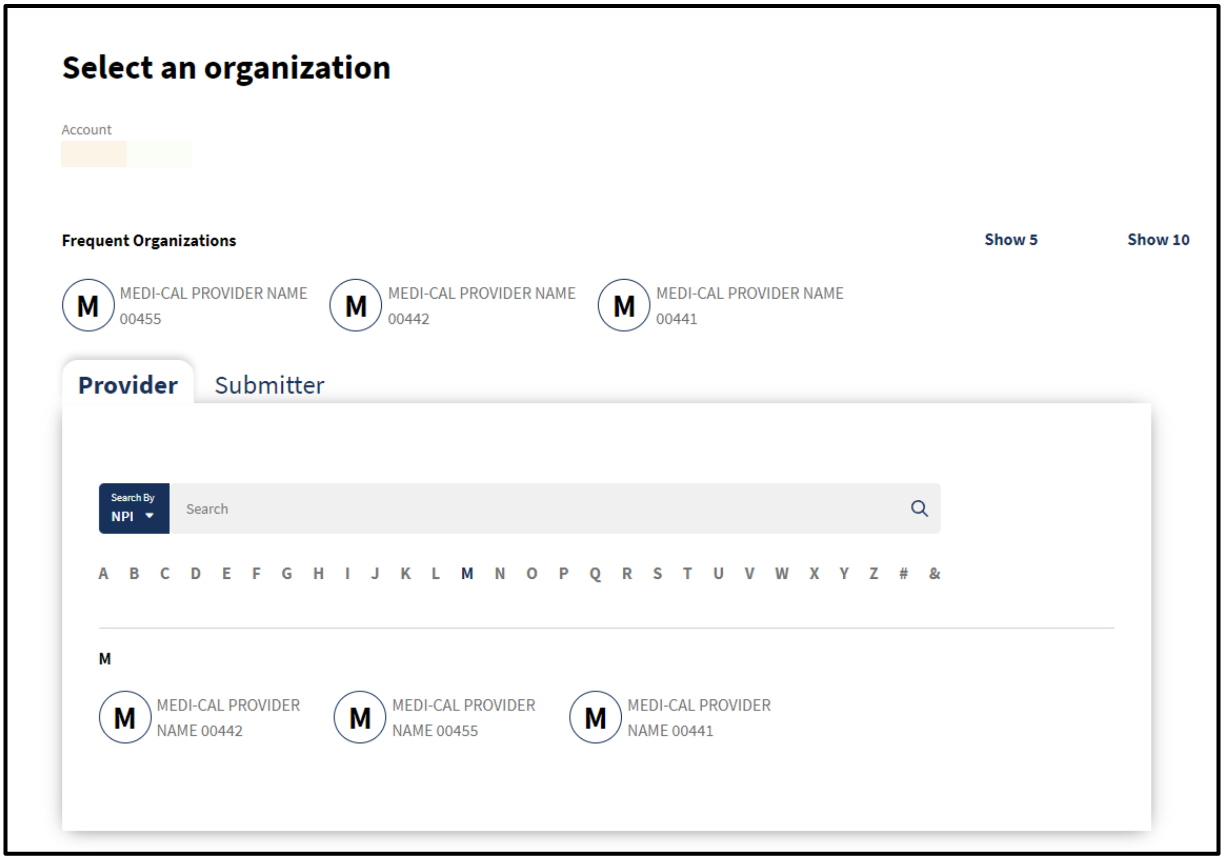


Figure 2.3: Select an organization page.

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.

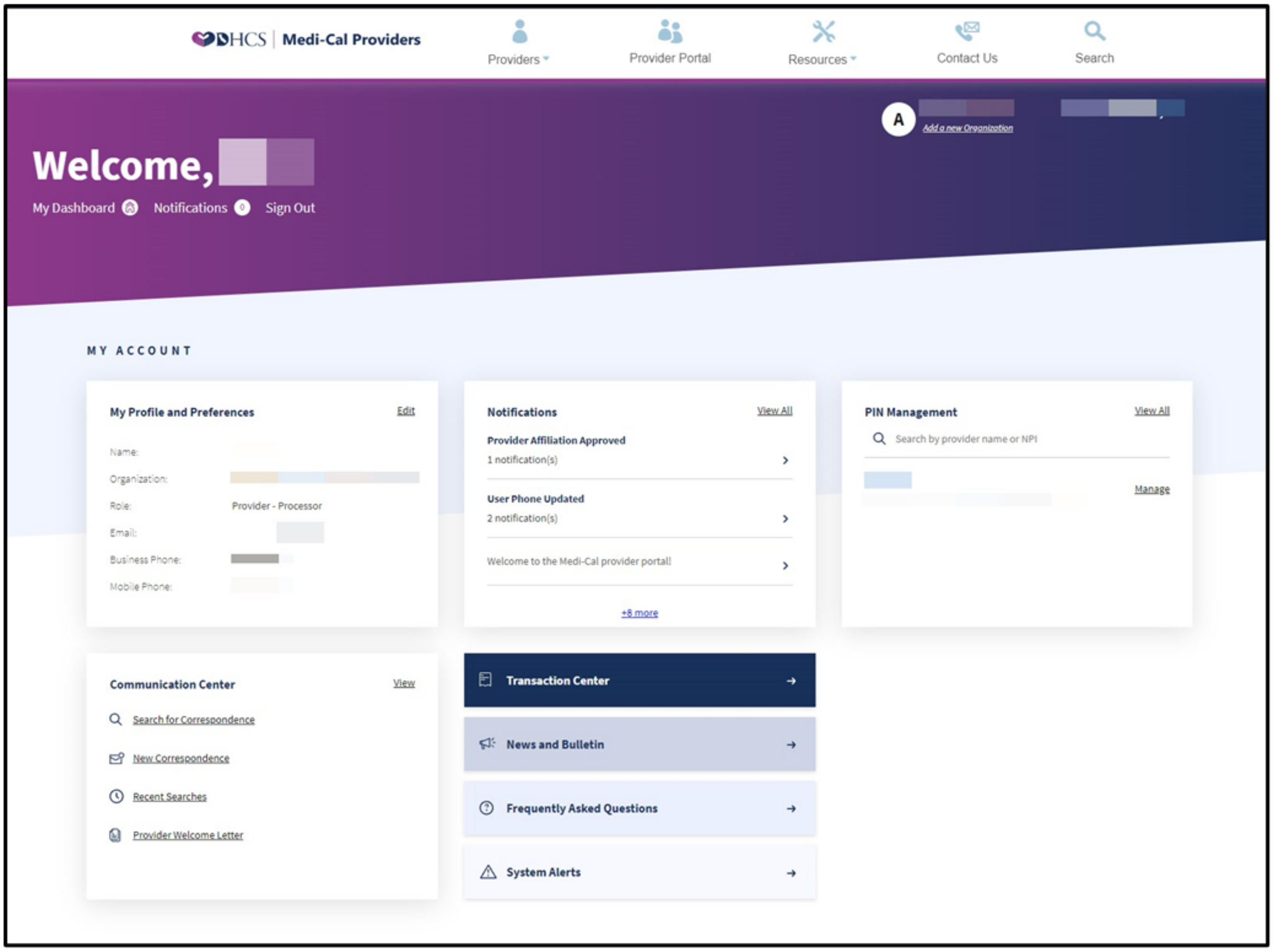


Figure 3.1: Provider Portal homepage.

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.

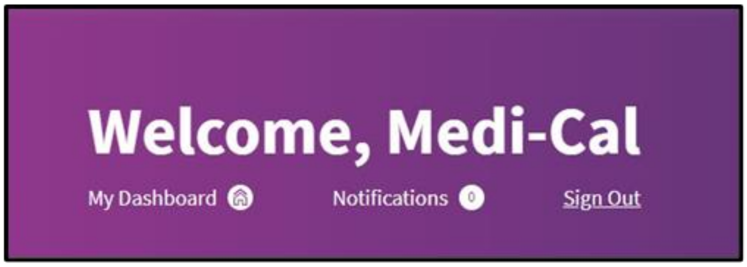


Figure 3.2: Options available in the upper left corner.

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.

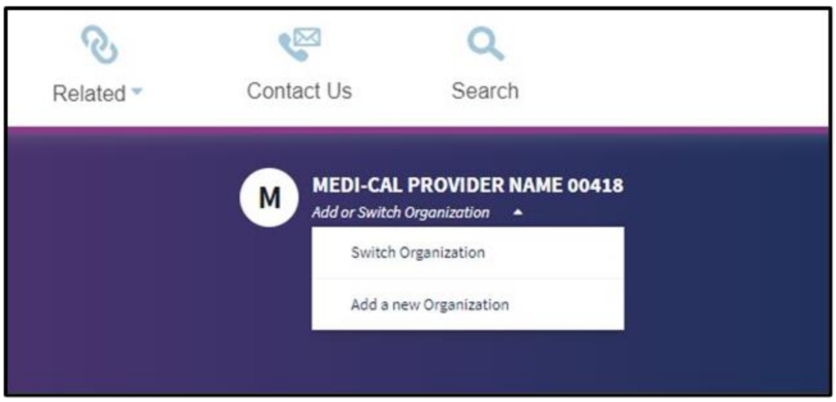


Figure 3.3: Drop-down menu options to add or switch organization.

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 3.4: Go Paperless link.

Select **Enroll Now.**

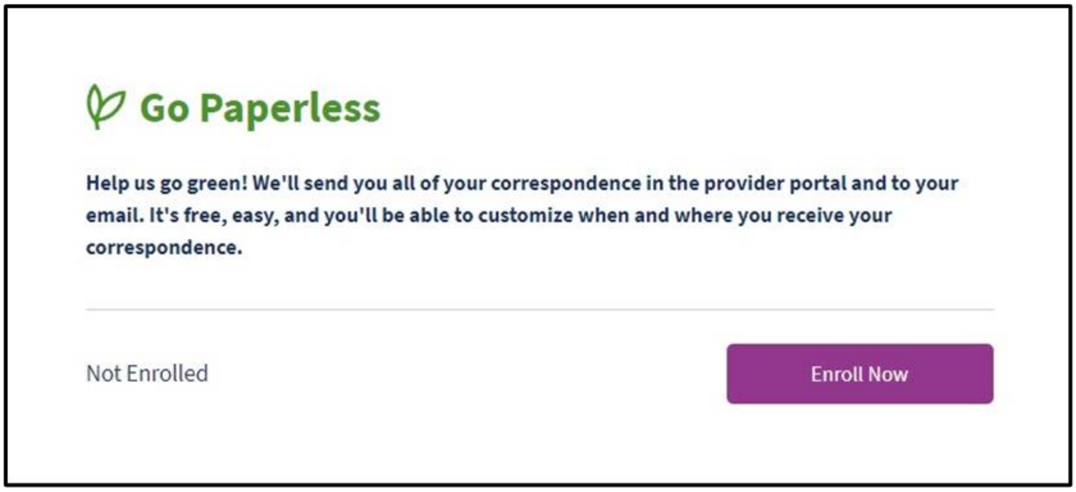


Figure 3.5: Go Paperless page with Enroll Now selection.

The user will receive a successfully enrolled message.

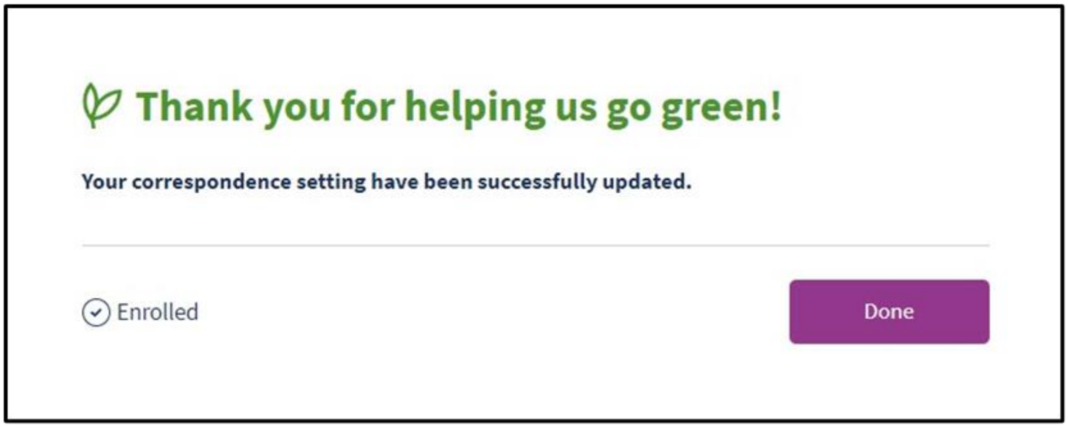


Figure 3.6: Successfully enrolled in paperless correspondence message.

Account Tiles

My Profile and Preferences

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

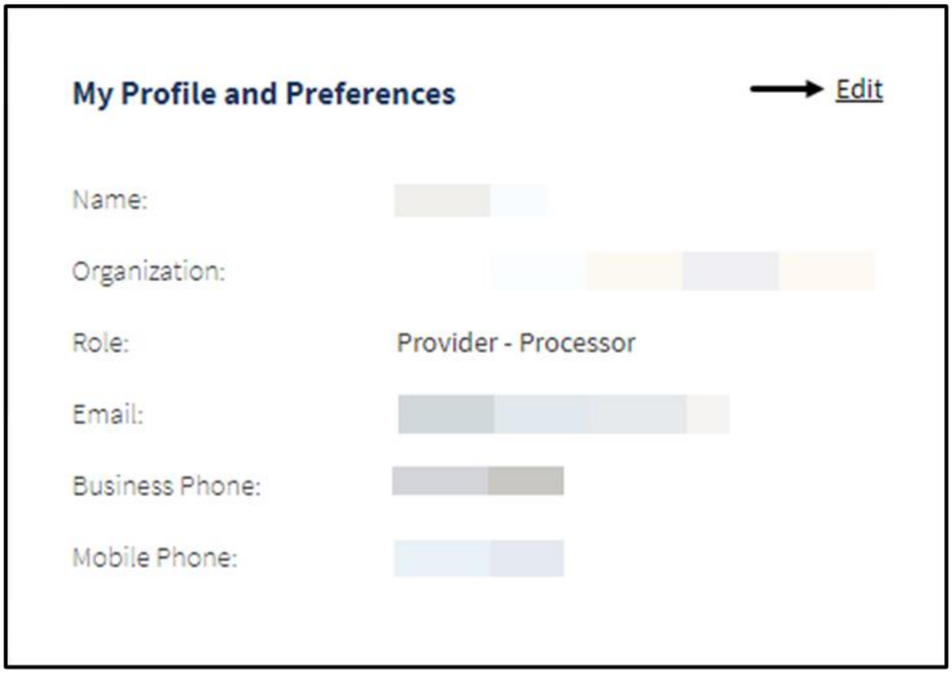


Figure 4.1: My Profile and Preferences tile.

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.

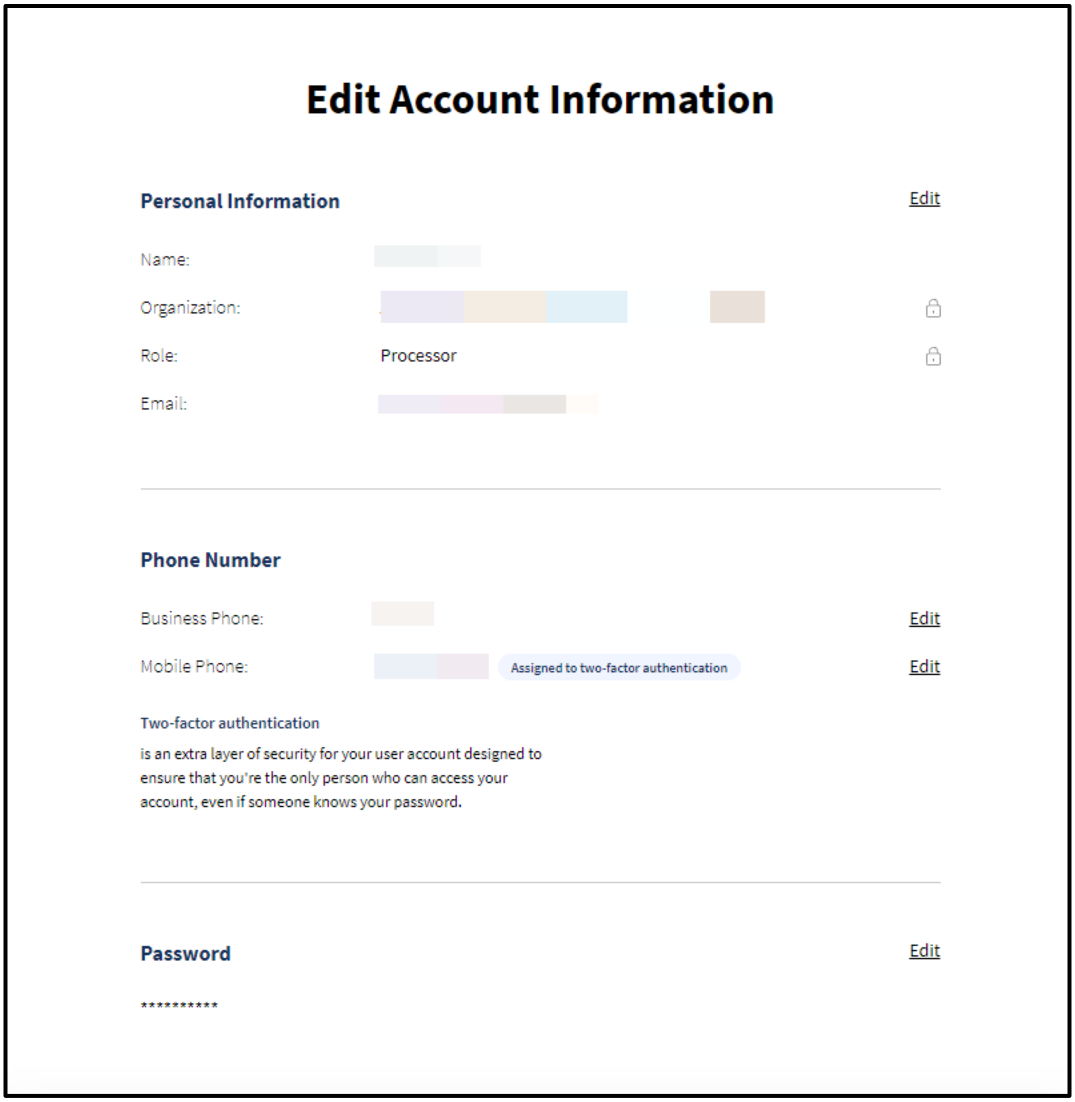


Figure 4.2: Edit Account Information page.

Under **Notifications Preferences** the frequency of notifications can be changed by selecting the dropdown menu for the desired notification. 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**.

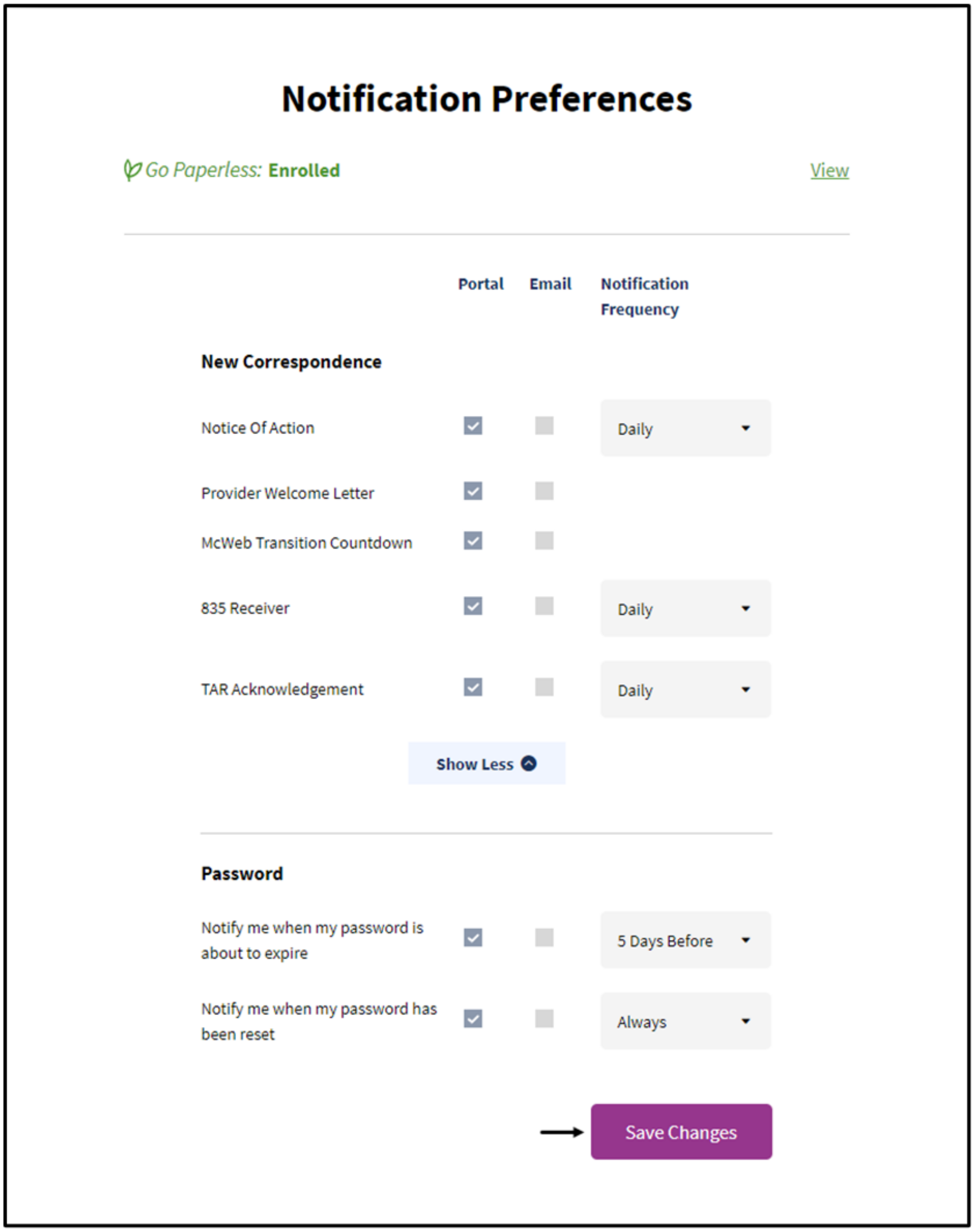


Figure 5.3: Notification preferences page.

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**.

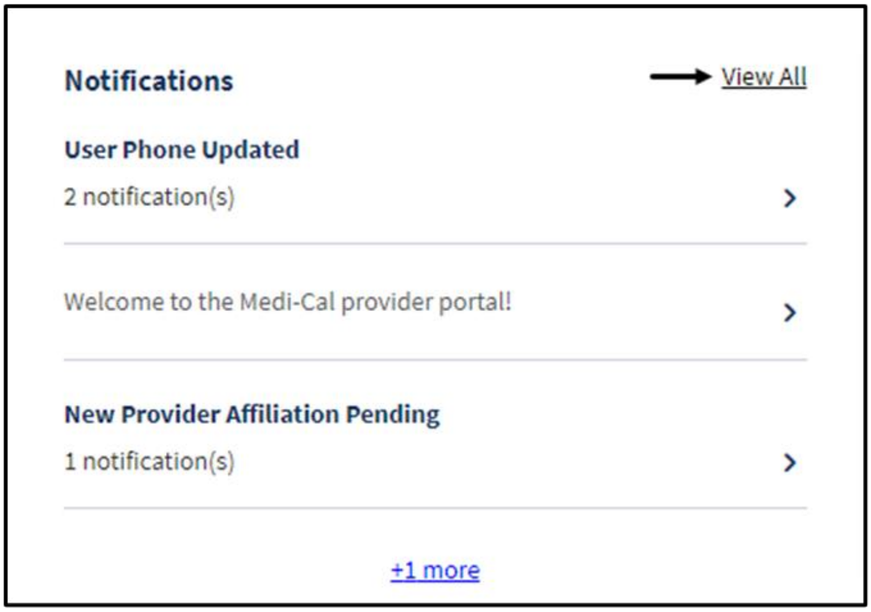


Figure 4.4: The Notifications tile.

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**. Additionally, in the upper right corner, is a link to **Edit Notification Preferences**.

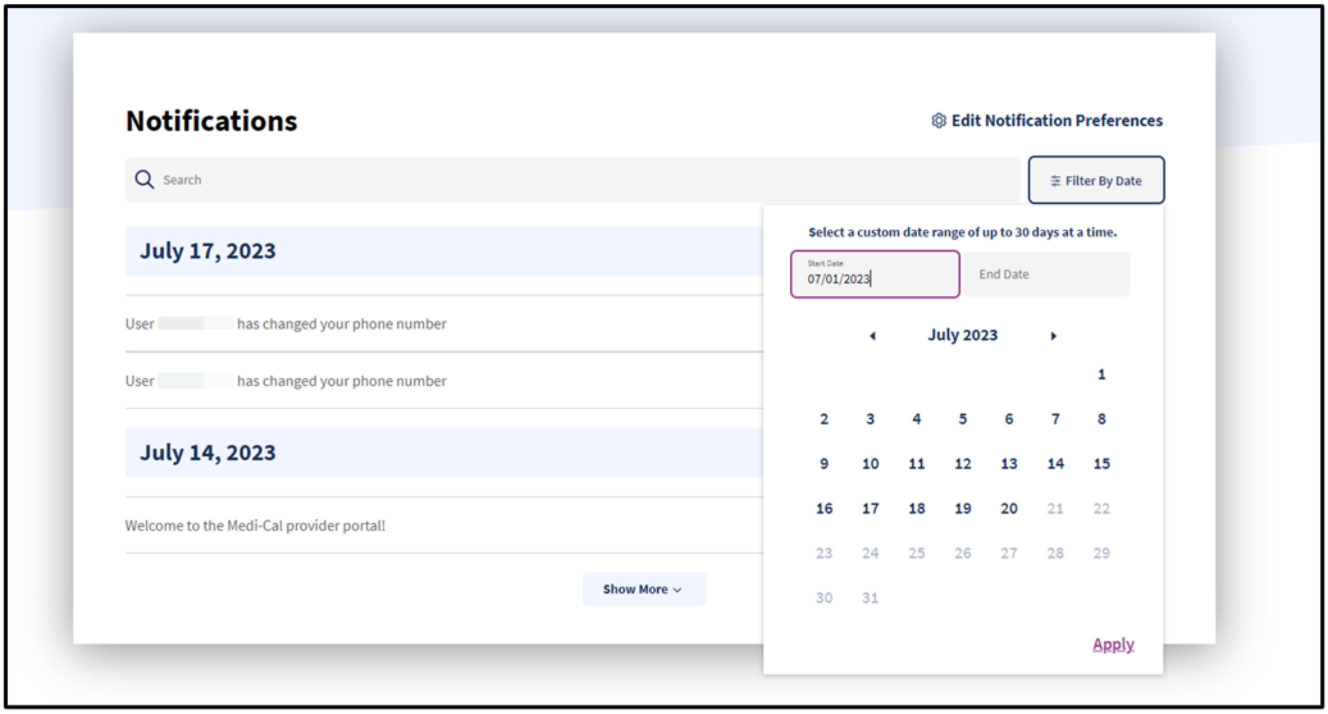


Figure 4.5: The Notifications page with **Edit Notification Preferences** link in the upper right corner.

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**.

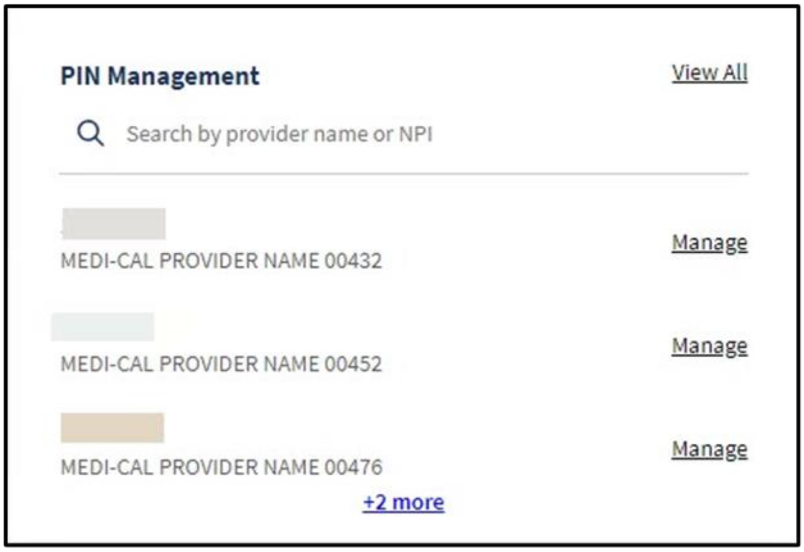


Figure 4.6: PIN Management tile.

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

Figure 4.7: PIN Management tile search bar.

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.

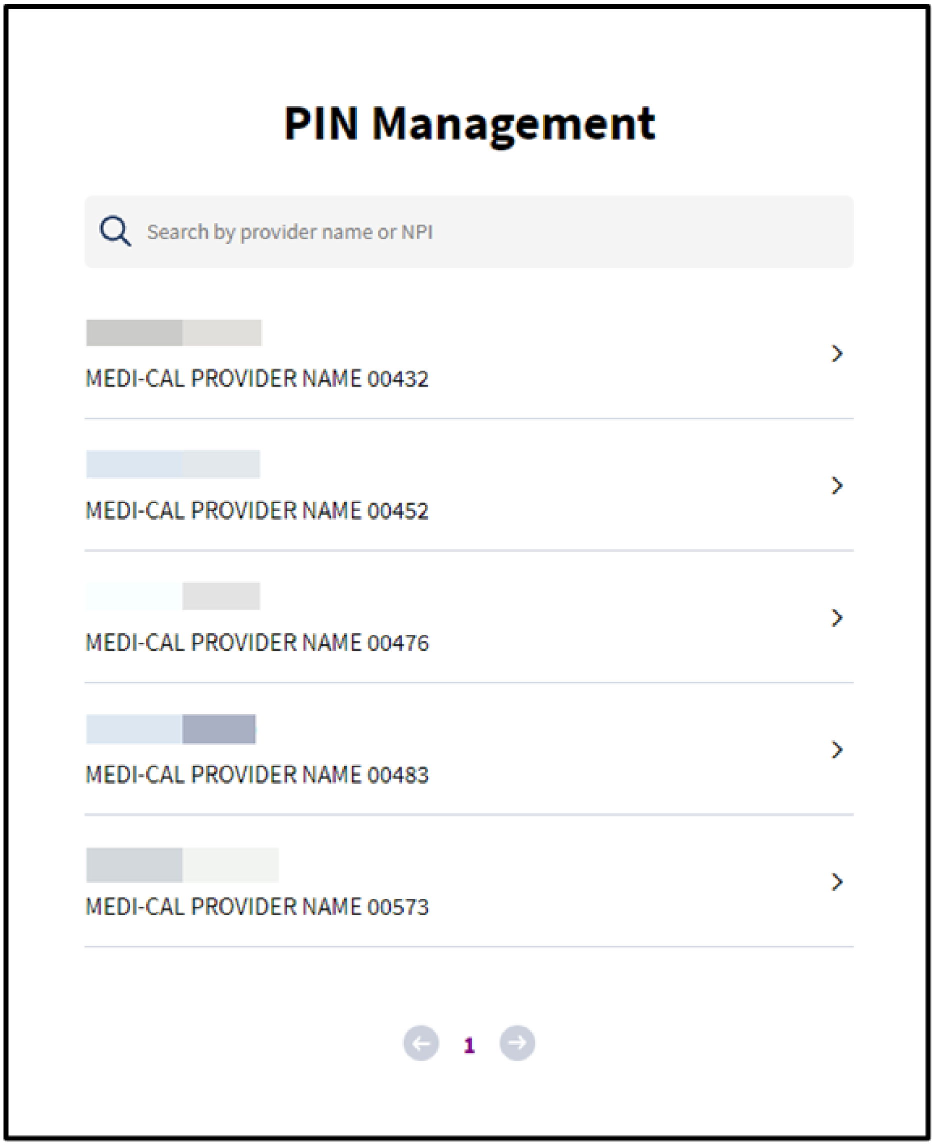


Figure 4.8: Search by provider name or NPI.

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.

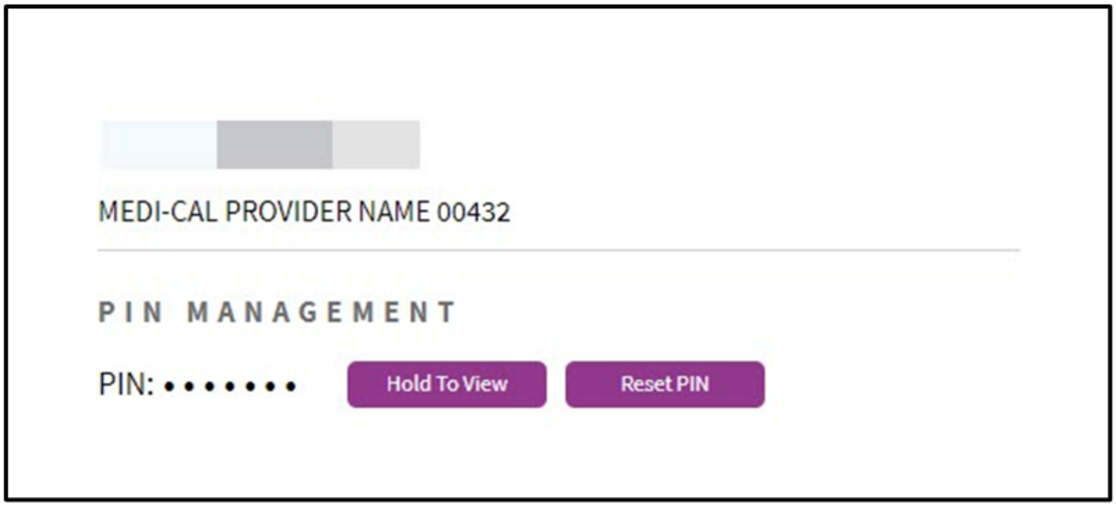


Figure 4.9: View PIN number by selecting **Hold to View**. **Reset PIN** option is also available.

Communication Center

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

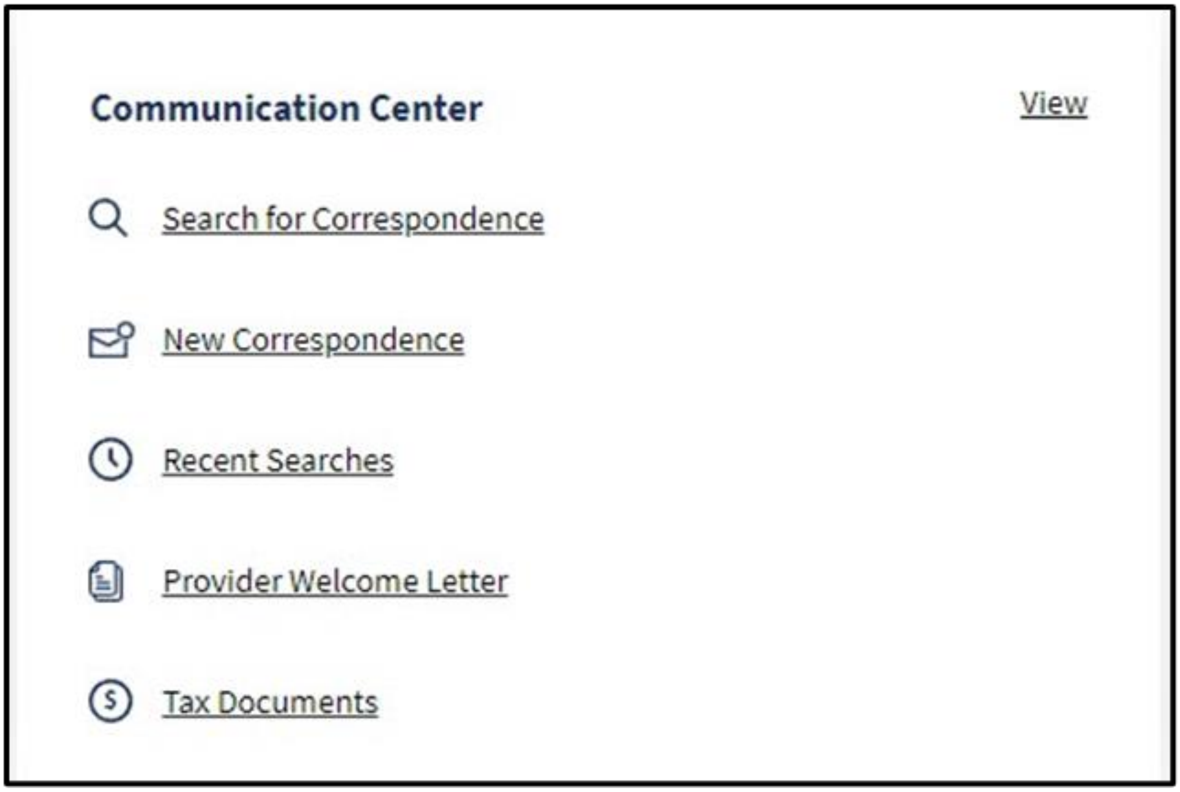


Figure 4.10: Communication Center area.

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

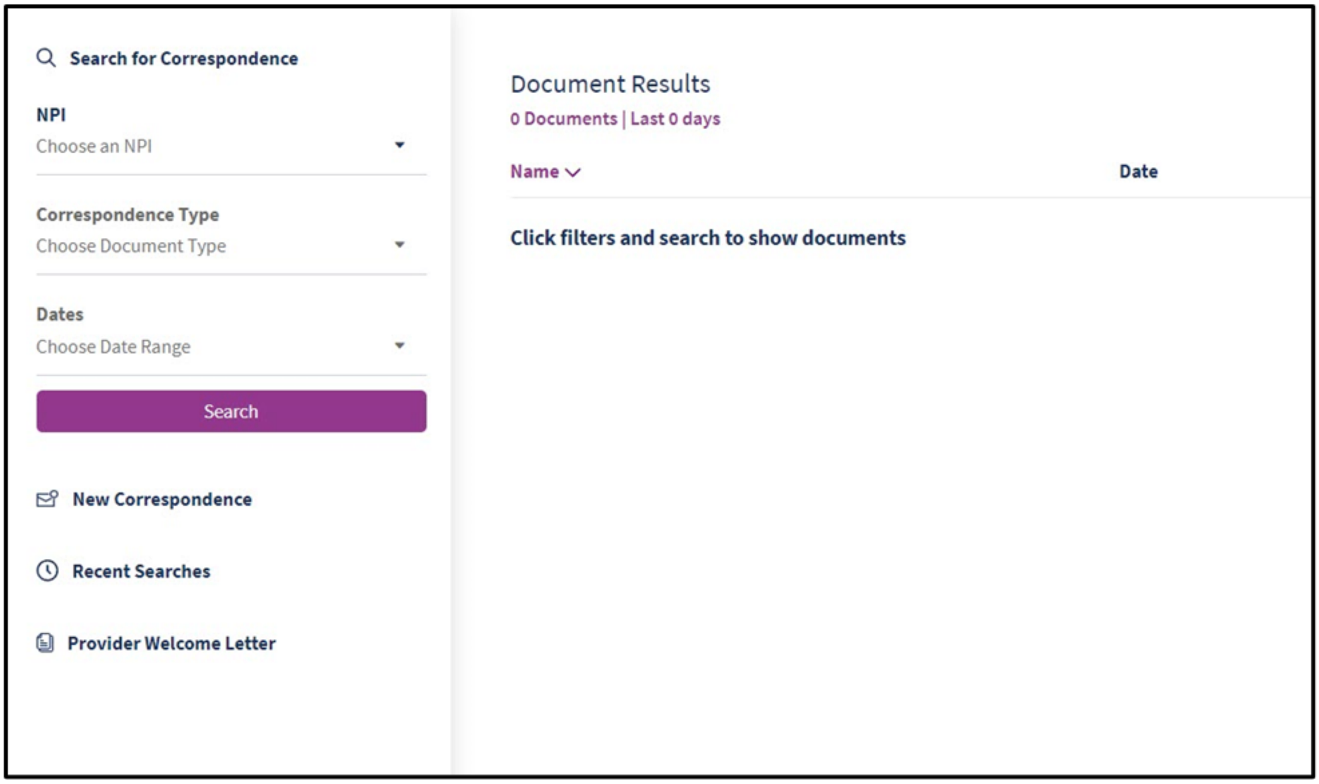


Figure 4.11: Search for Correspondence screen.

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

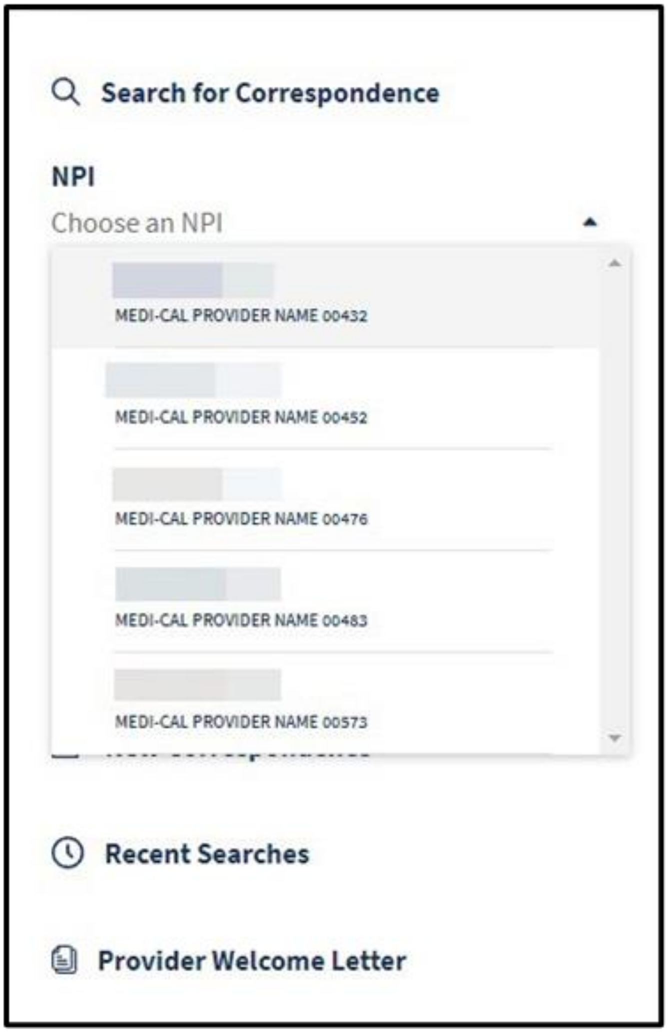


Figure 4.12: Search for Correspondence screen with NPI selected.

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

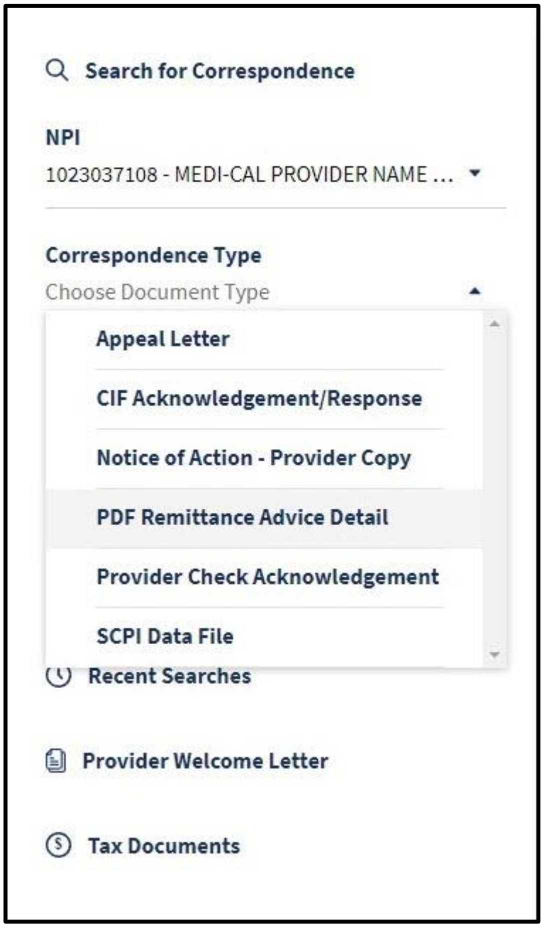


Figure 4.13: Search for Correspondence screen with **Correspondence Type** selected from the NPI search list.

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

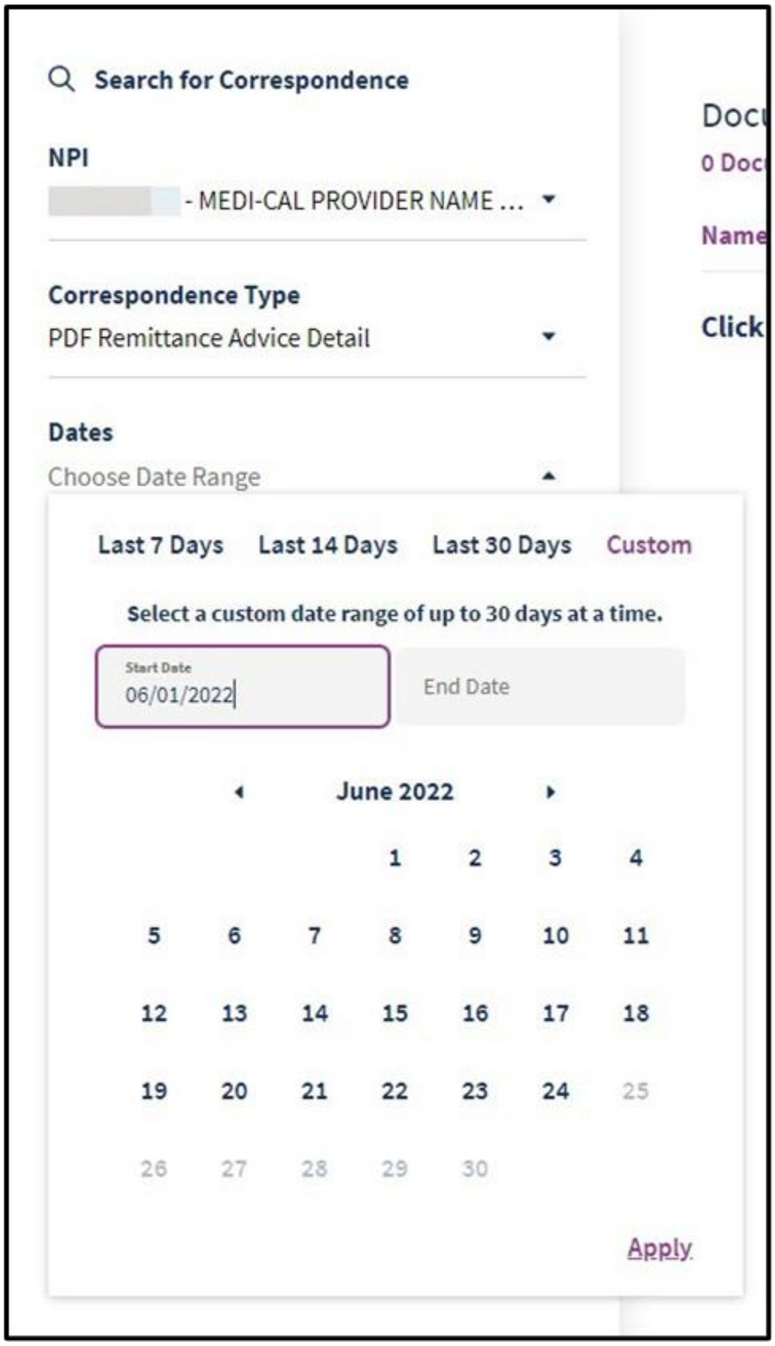


Figure 4.14: Data Range selected on the Search for Correspondence screen.

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

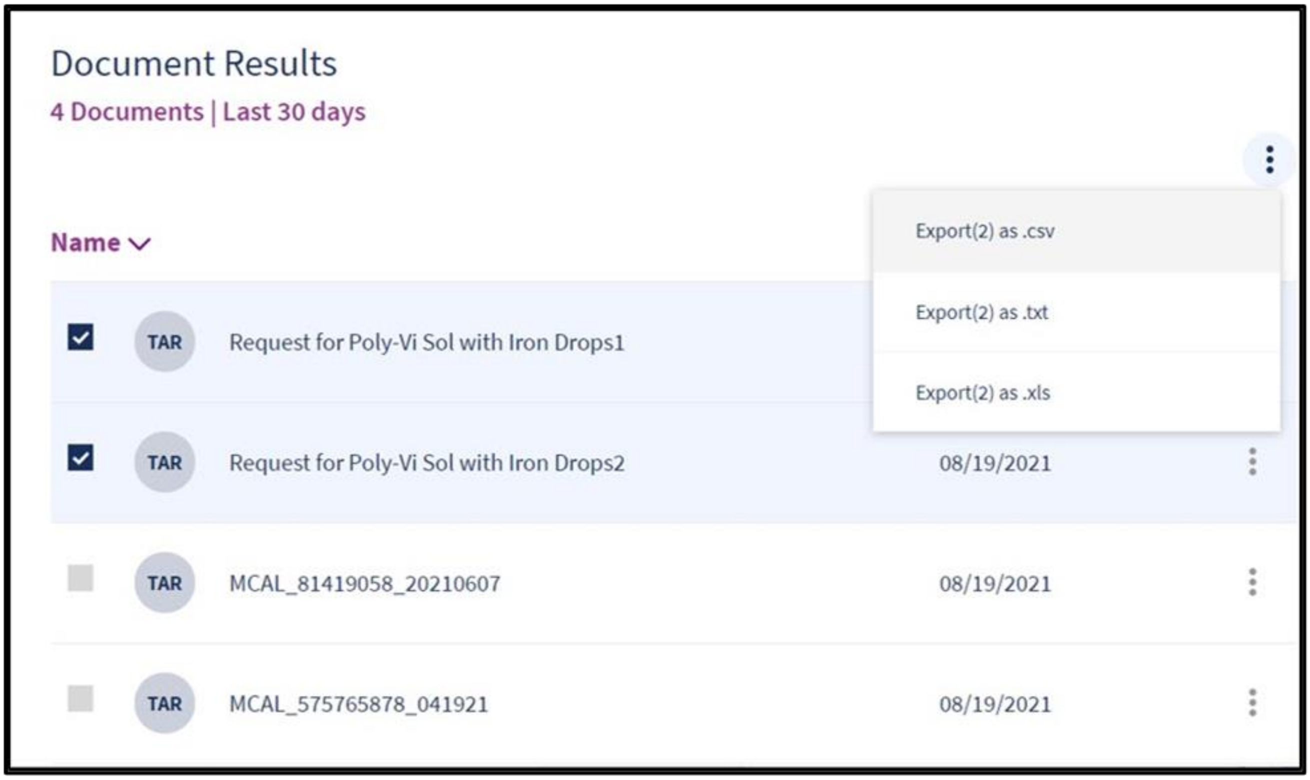


Figure 4.15: Search results displayed on the **Document Results** page.

Lists all **New Correspondence** since the last time a user has logged in.

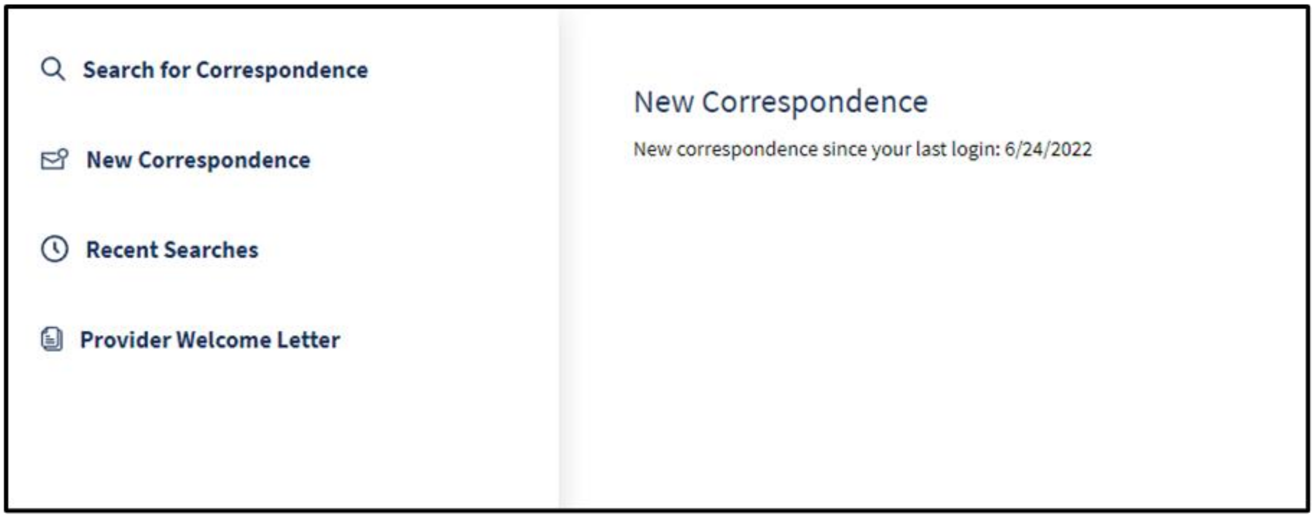


Figure 4.16: New Correspondence listed.

Recent Searches are displayed when selected.

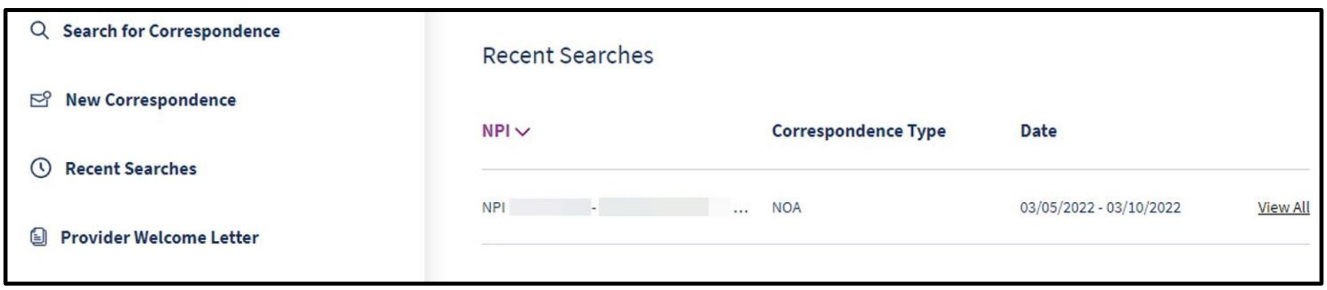


Figure 4.17: Recent Searches displayed.

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**.

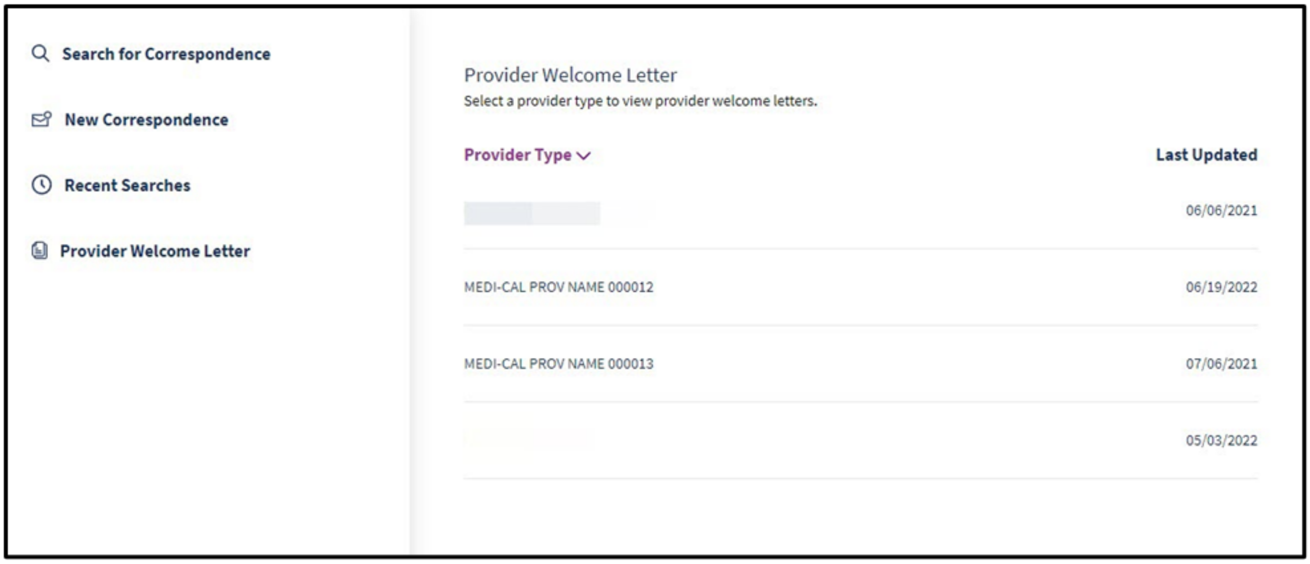


Figure 5.1: Provider Welcome Letter selected from the Communication Center tile.

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

Figure 5.2: Provider Welcome Letter displayed.

3. A PDF version of the letter appears.

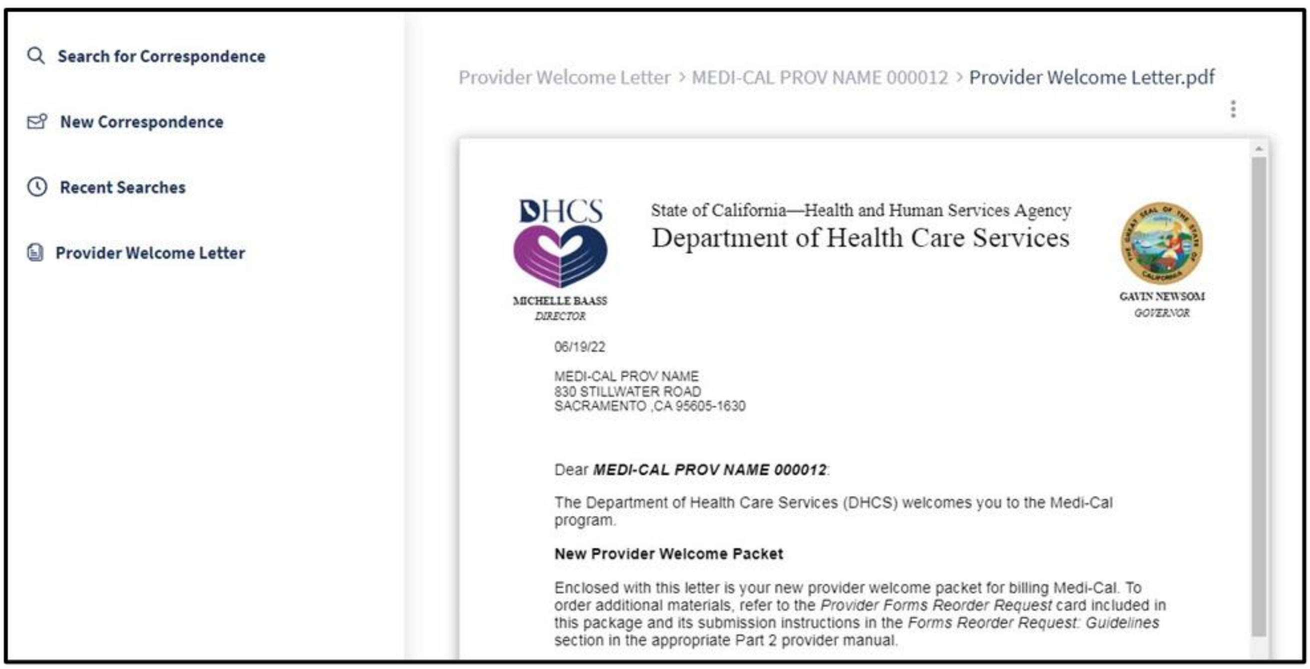


Figure 5.3: After Provider Welcome Letter is selected, a PDF version of the letter is displayed.

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.

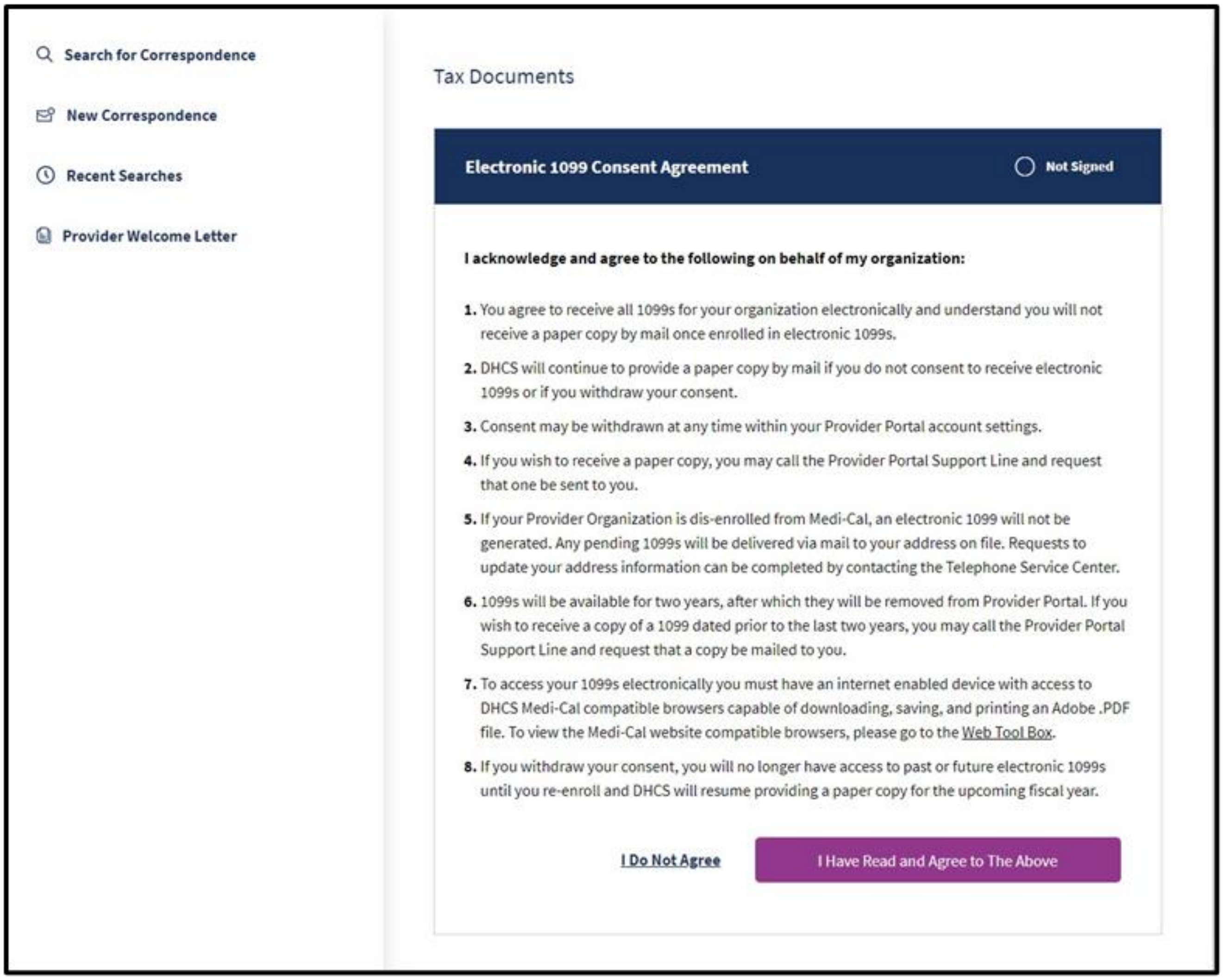


Figure 6.1: Electronic 10999 Consent Agreement form.

Next a list of tax documents will appear.

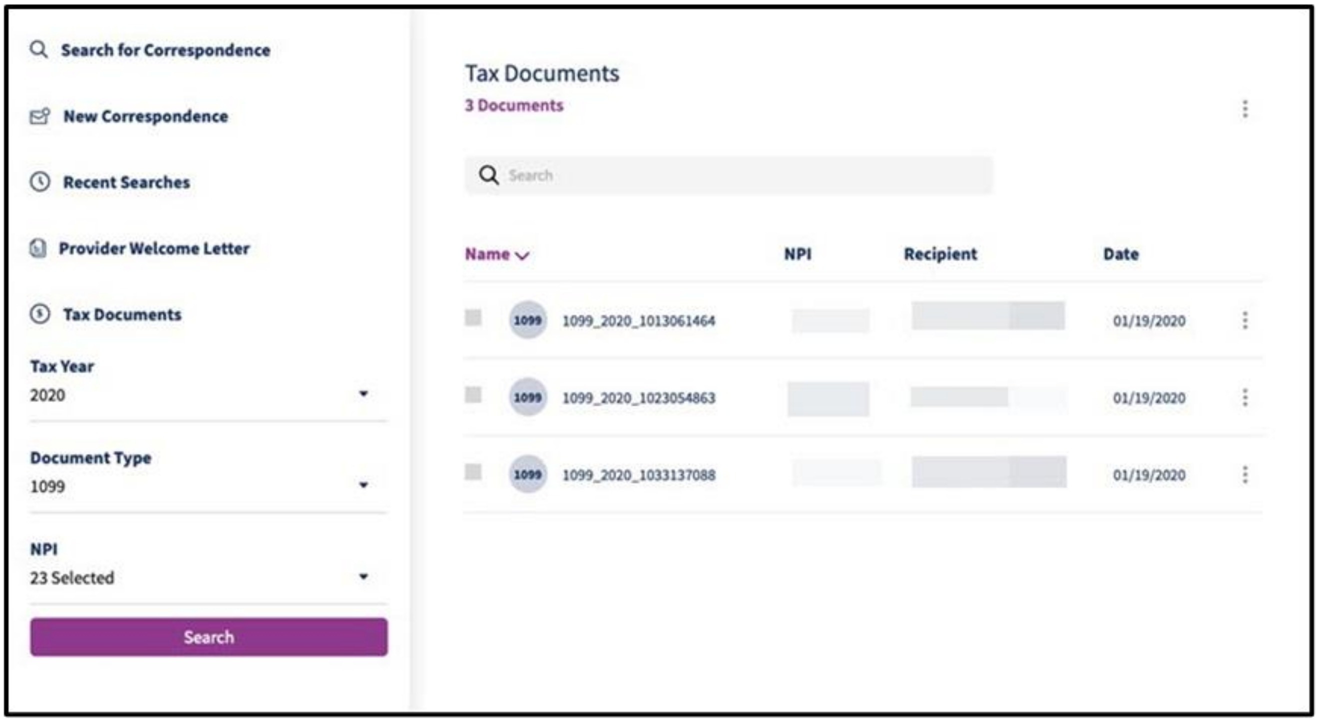


Figure 6.2: A list of tax documents on the Tax Documents screen.

Additional Resources

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

Figure 6.3: Links on the Provider Portal Dashboard.

Transaction Center

The **Transaction Center** is a forthcoming feature that will be implemented in a later release. When a user signs up for the Provider Portal may access Transaction Services by secure single sign-on into the portal.

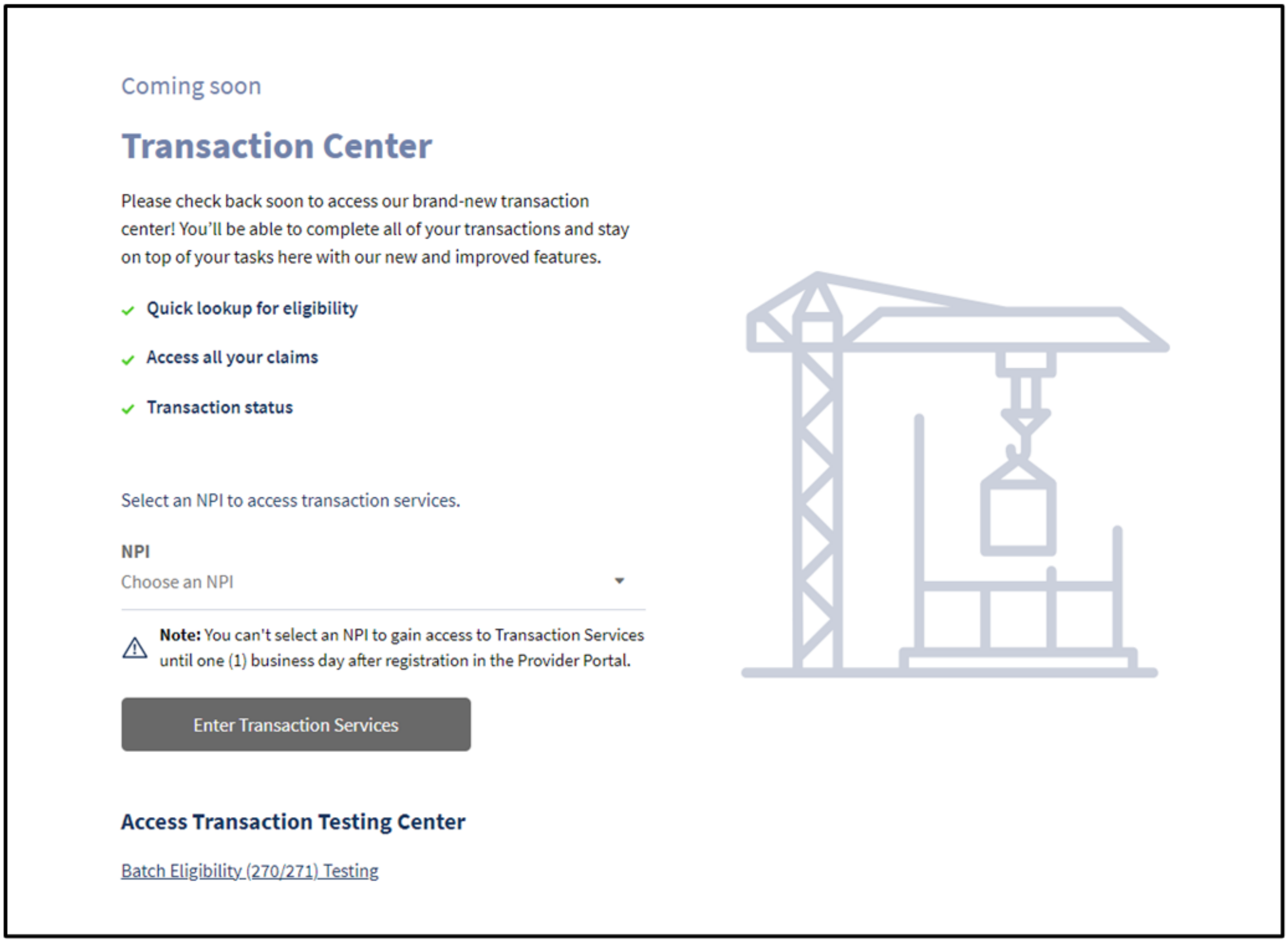


Figure 7.1: Transaction Center coming soon screen.

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

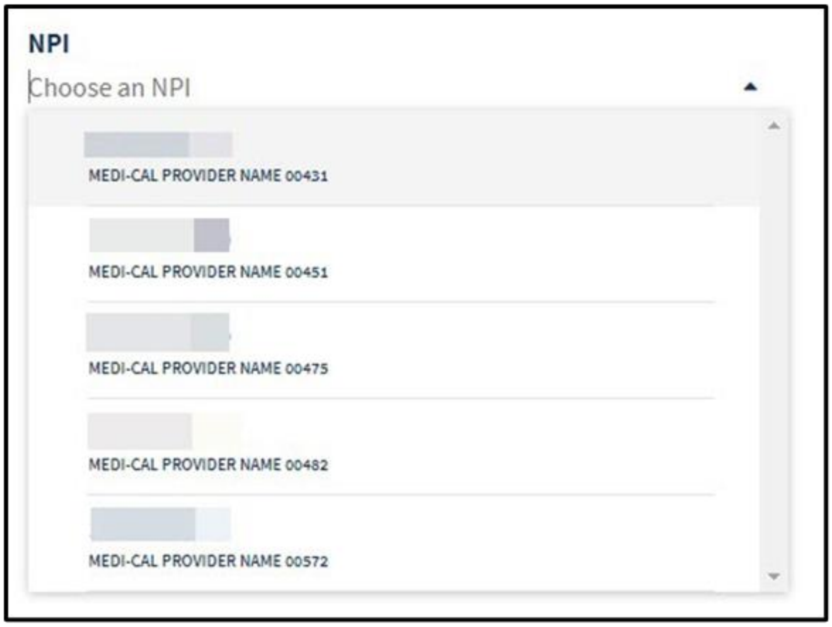


Figure 7.2: Drop-down menu of NPIs.

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

Figure 7.3: 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.

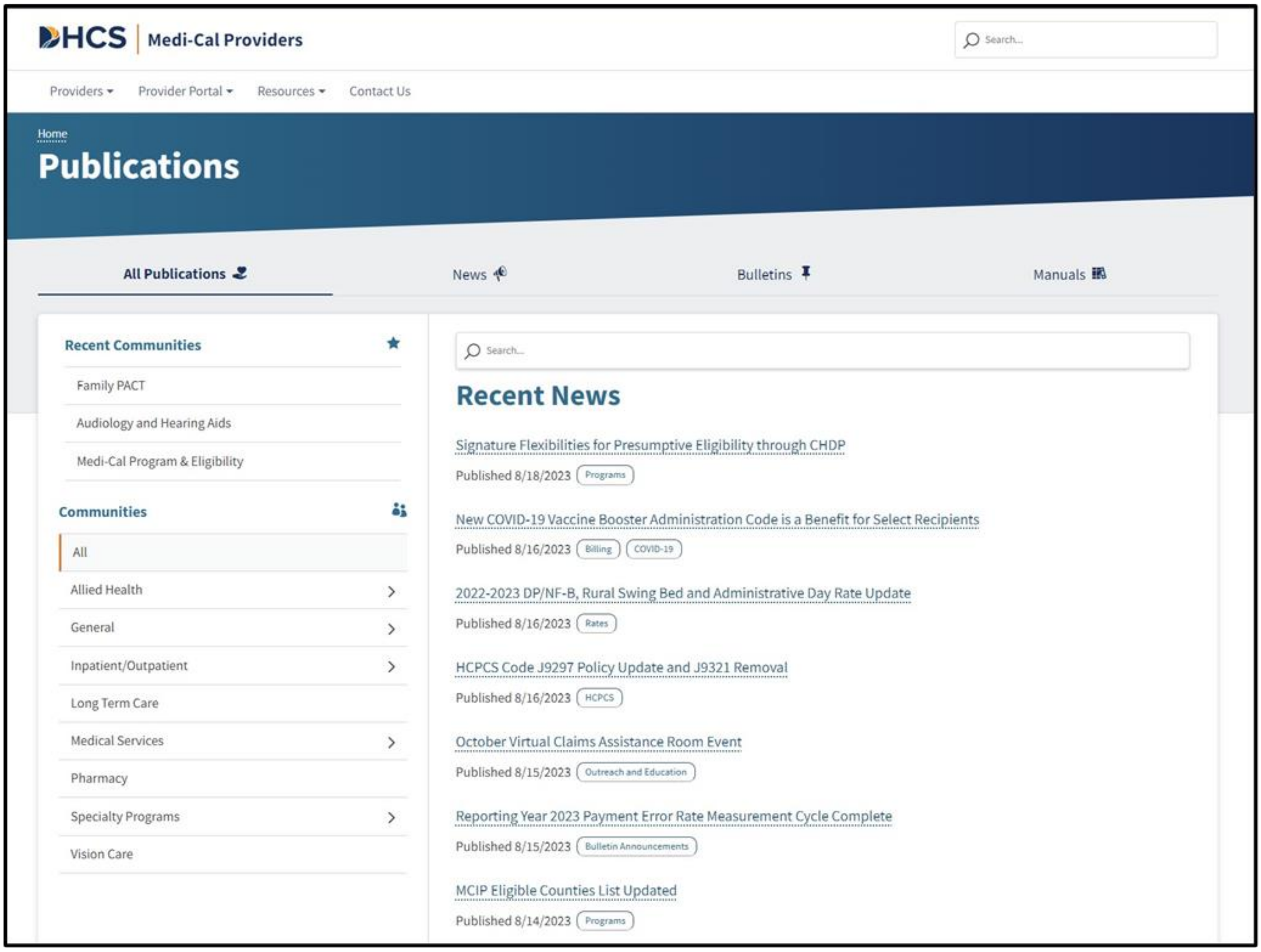


Figure 8.1: The Community Navigation page with Communication tab selected.

Frequently Asked Questions

This 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.

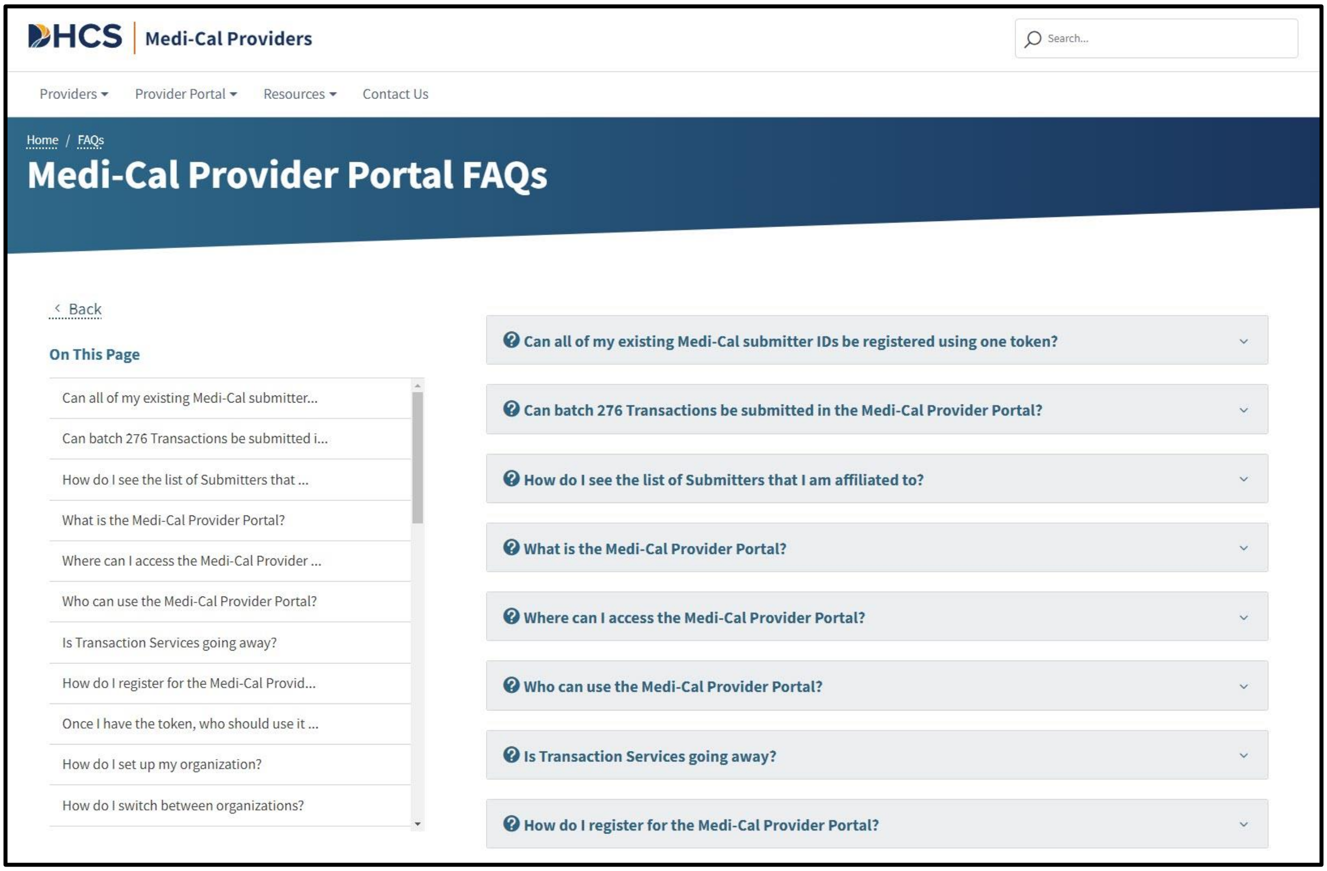


Figure 8.2: The Medi-Cal Provider Portal FAQ page.

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

Resource Information

Medi-Cal Providers website

- Provider Manuals
- Provider Bulletins
- Medi-Cal Subscription Service (MCSS)
- Medi-Cal Learning Portal (MLP)
- Telephone Service Center (TSC) 1-800-541-5555
- Provider Field Representatives
- Virtual Claims Assistance Room (VCAR)
- Small Provider Billing Assistance and Training 916-636-1275

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/*. Enter email address then select the **Join Medi-Cal Provider Portal.**

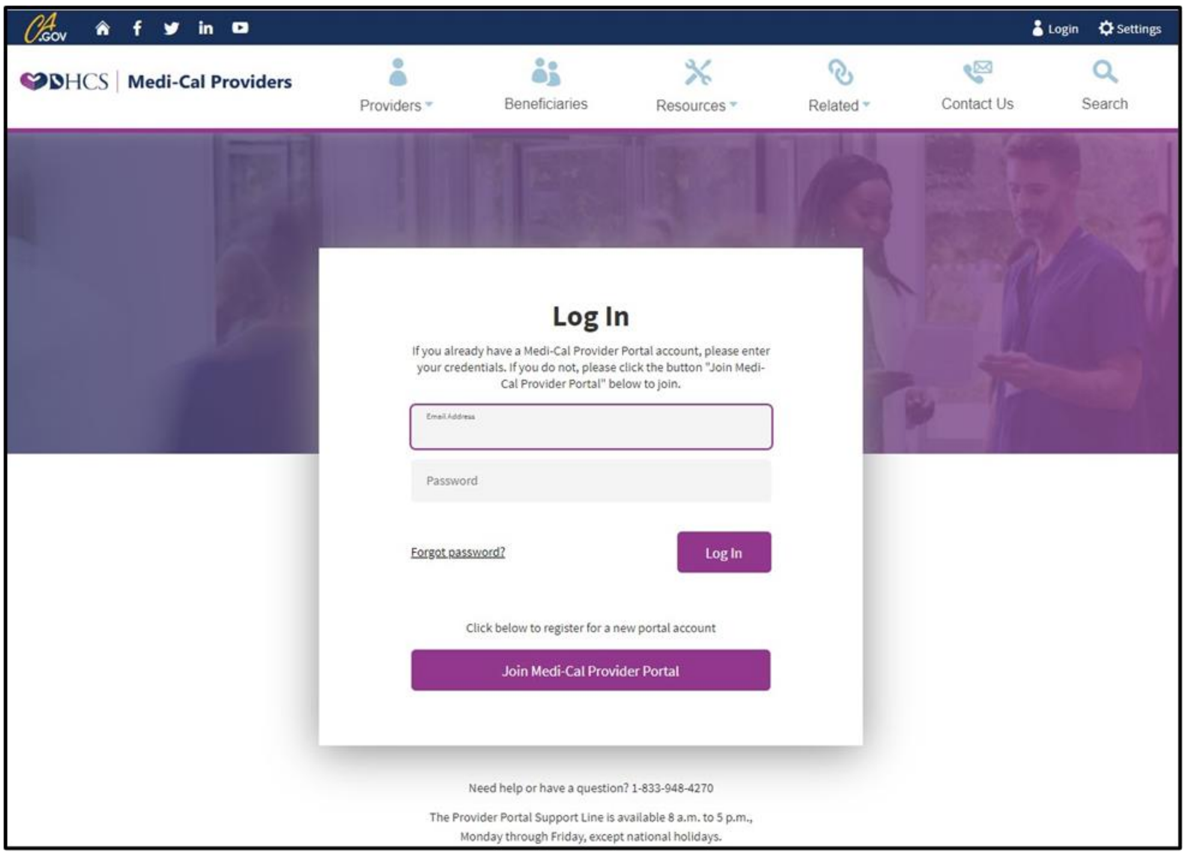


Figure 1.1: The Provider Portal Log In screen.

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

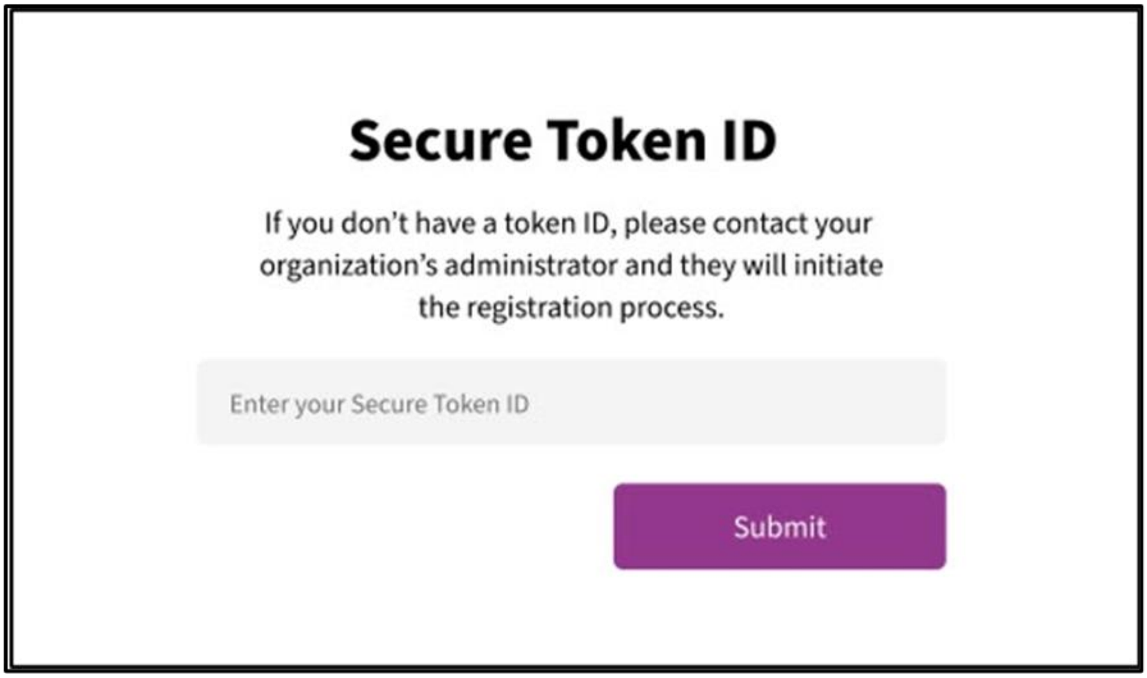


Figure 1.2: Secure Token ID screen.

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**.

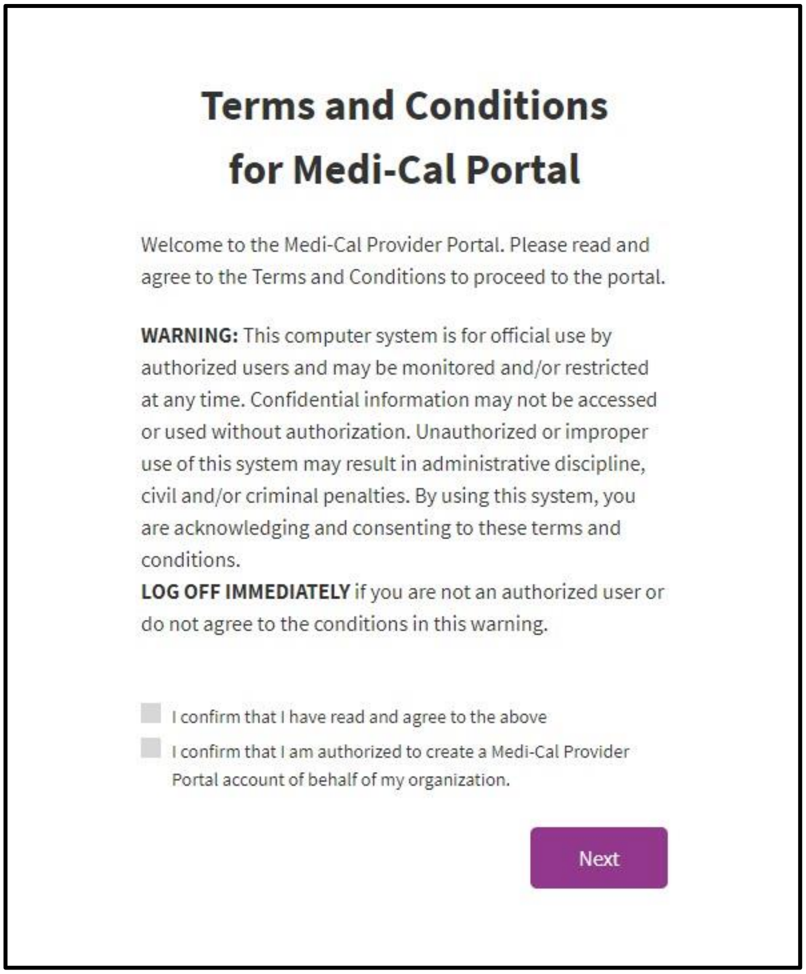


Figure 1.3: Terms and Conditions for Medi-Cal Provider Portal screen.

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**.

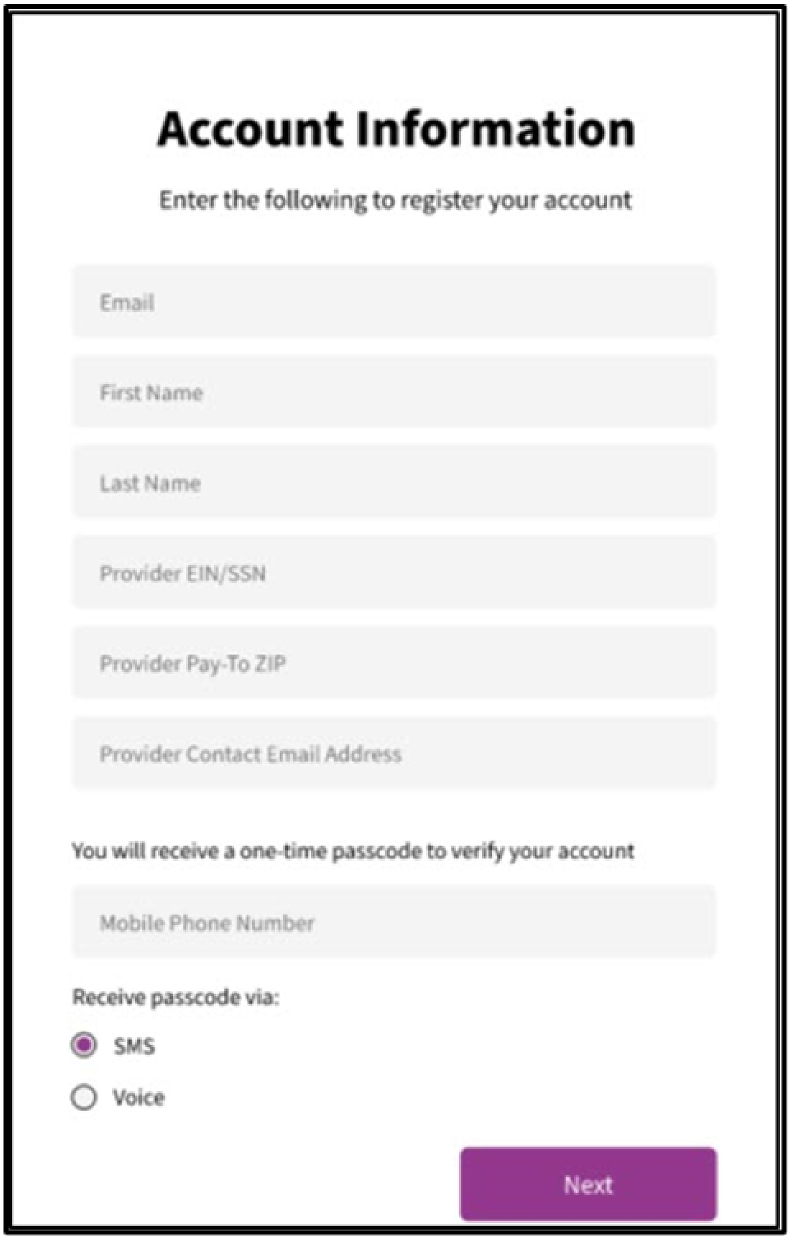


Figure 1.4: Account Information window.

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**.

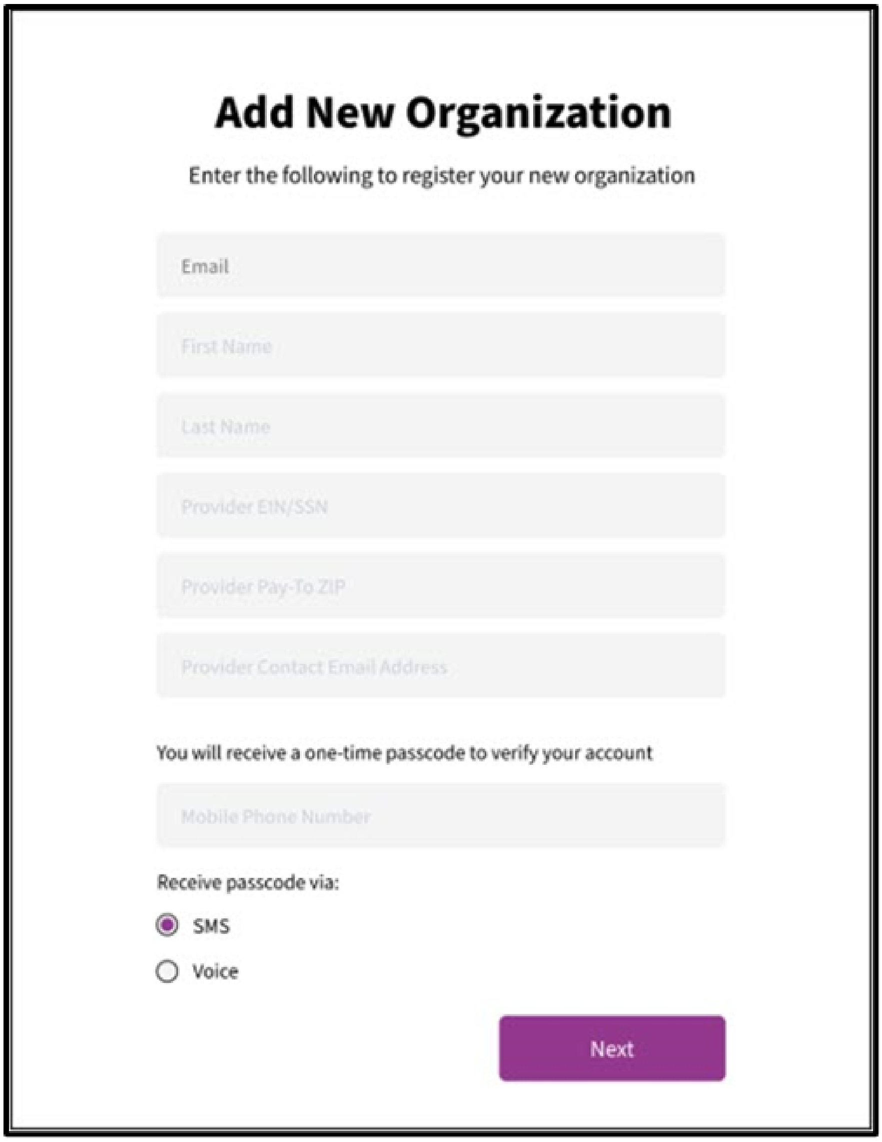


Figure 1.5: Add New Organization window.

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.

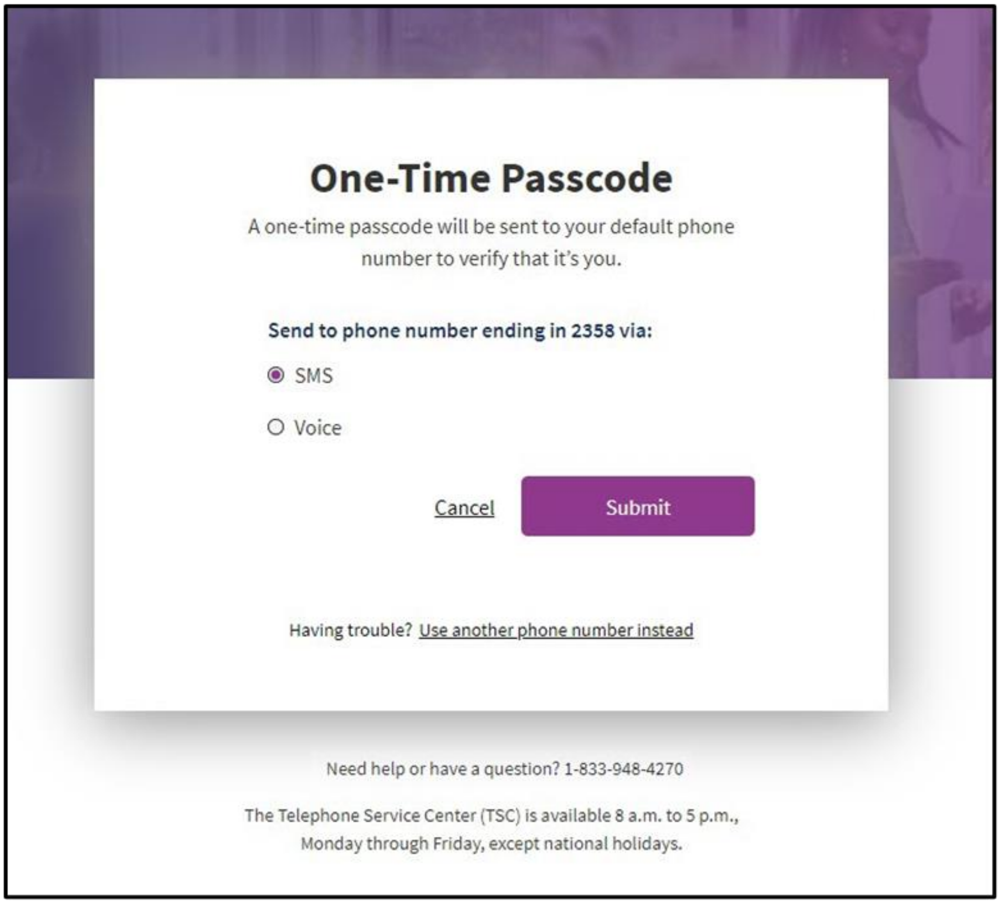


Figure 1.6: OTP passcode window.

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

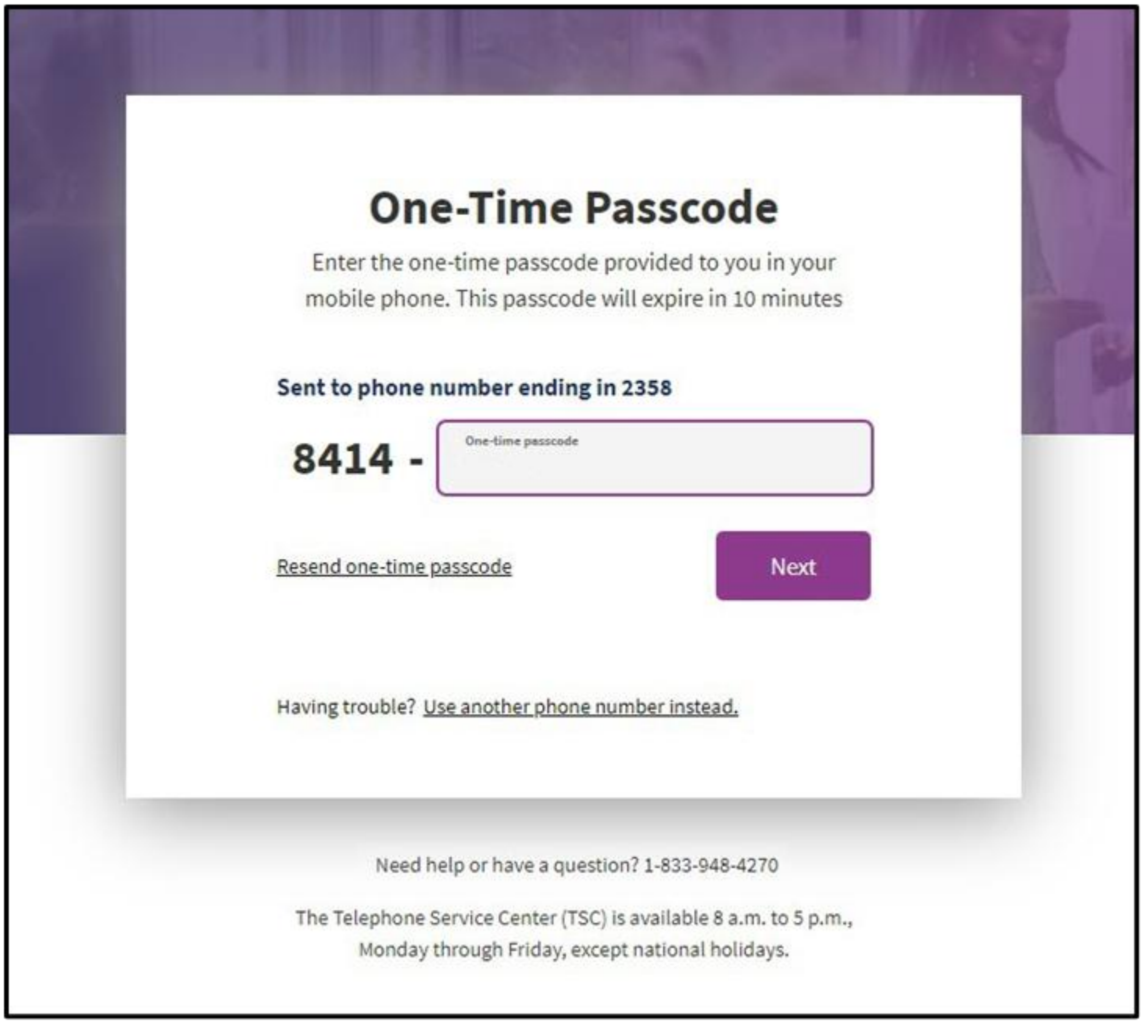


Figure 1.7: OTP passcode window with area to input the code.

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

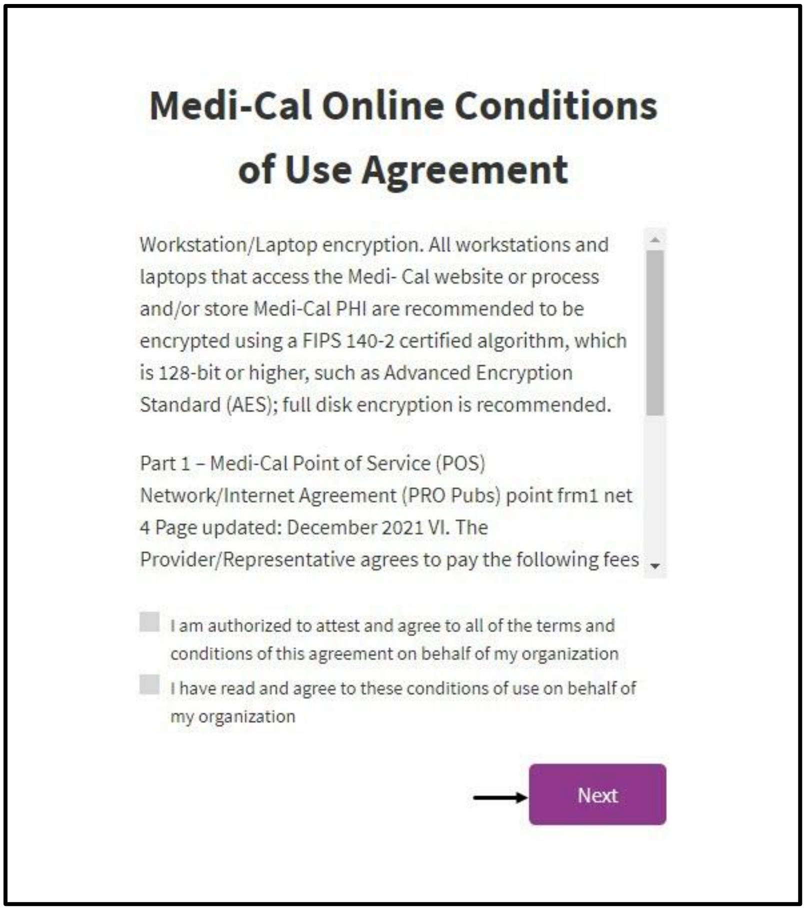


Figure 1.8: OTP passcode window with area to input the code.

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.

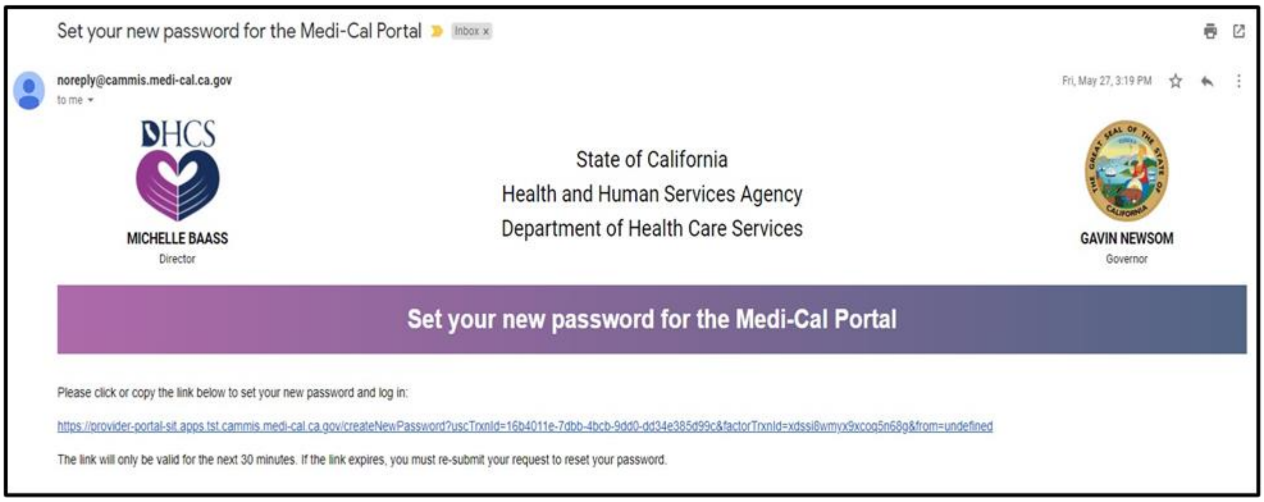


Figure 1.10: “Set your new password for the Medi-Cal Portal” email from DHCS.

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.

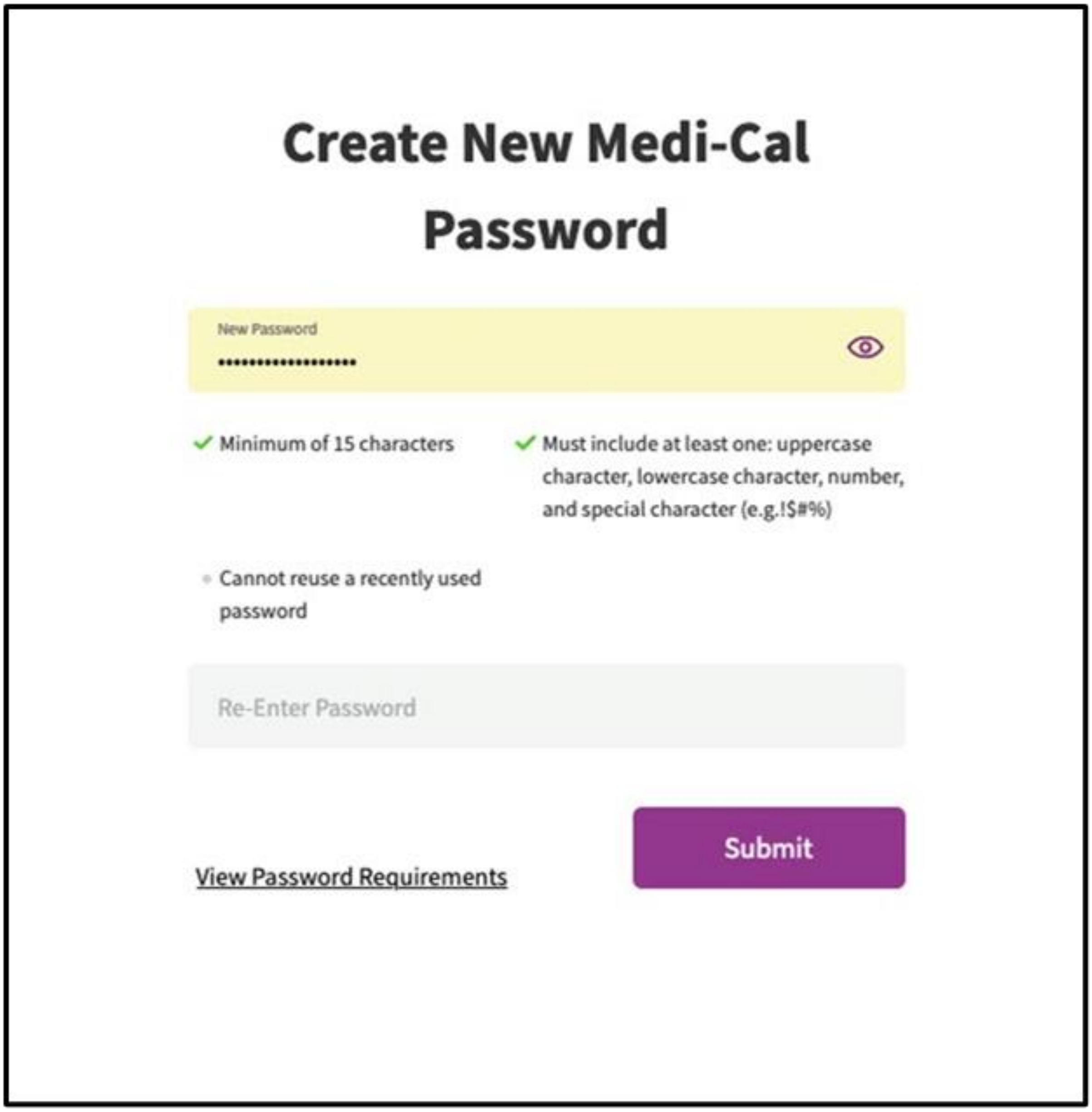


Figure 1.11: Create a new Medi-Cal password screen.

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

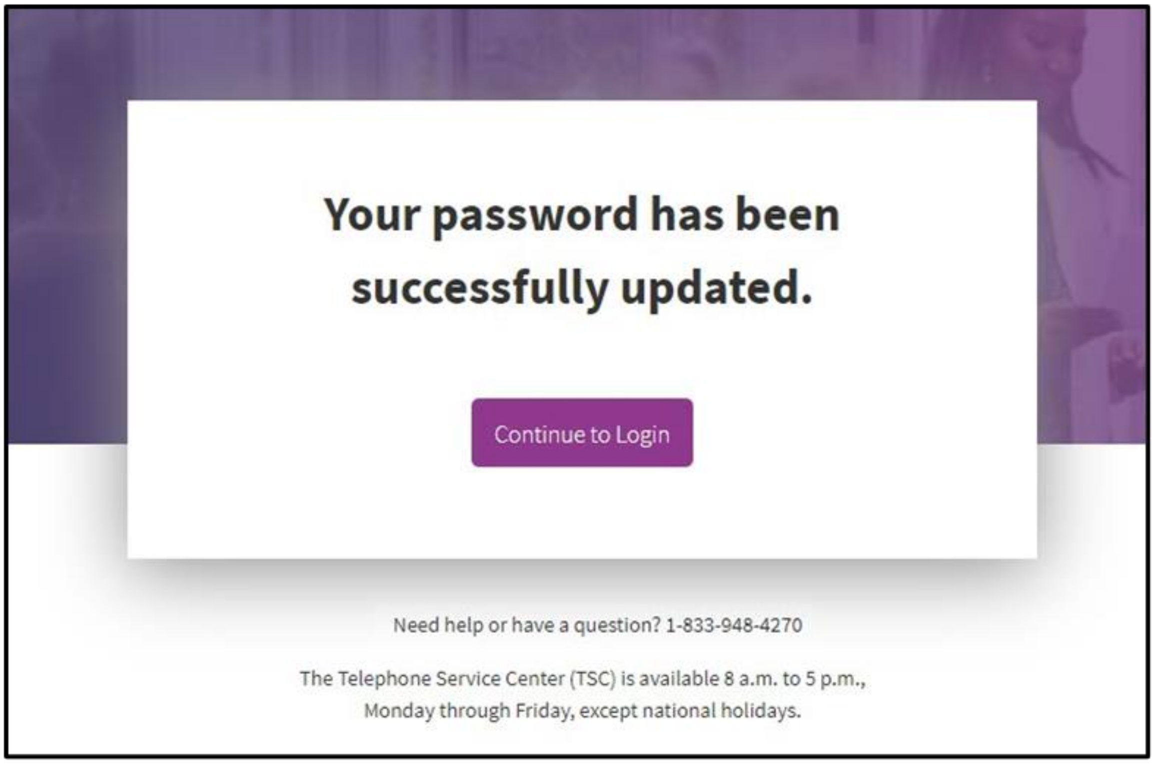


Figure 1.12: Password successfully updated message.

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/ 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.

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

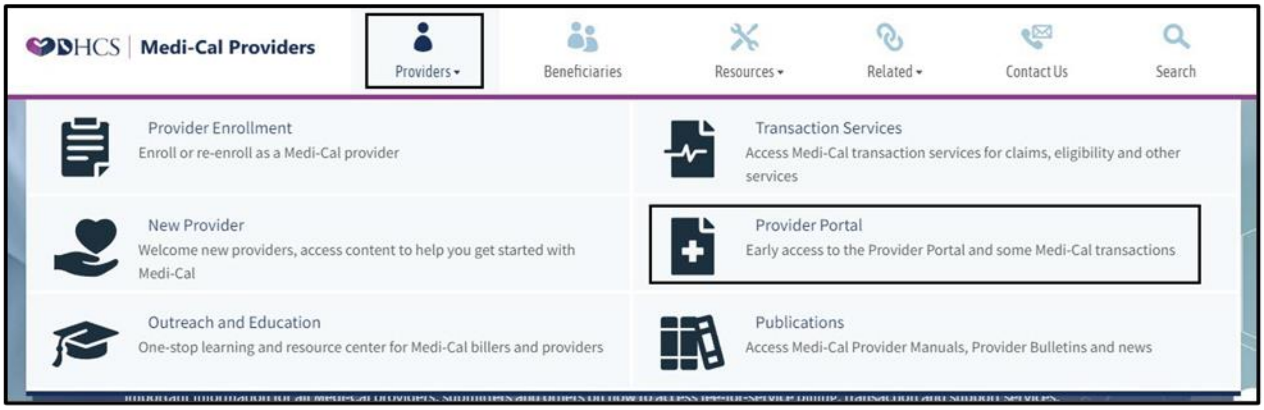


Figure 2.3: The Providers tab with the Provider Portal listing.

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

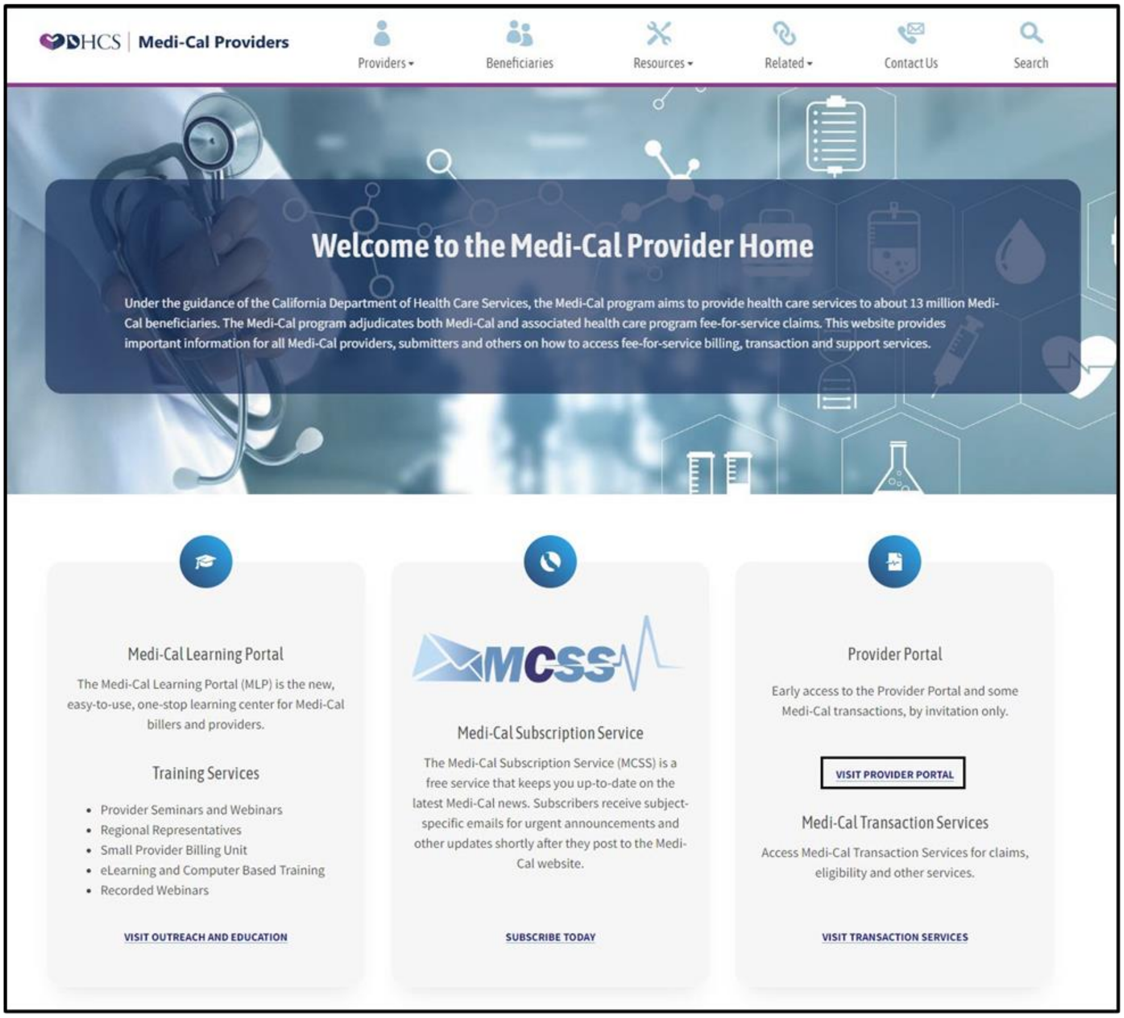


Figure 2.4: Visit the Provider Portal link on the Medi-Cal Providers website homepage.

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

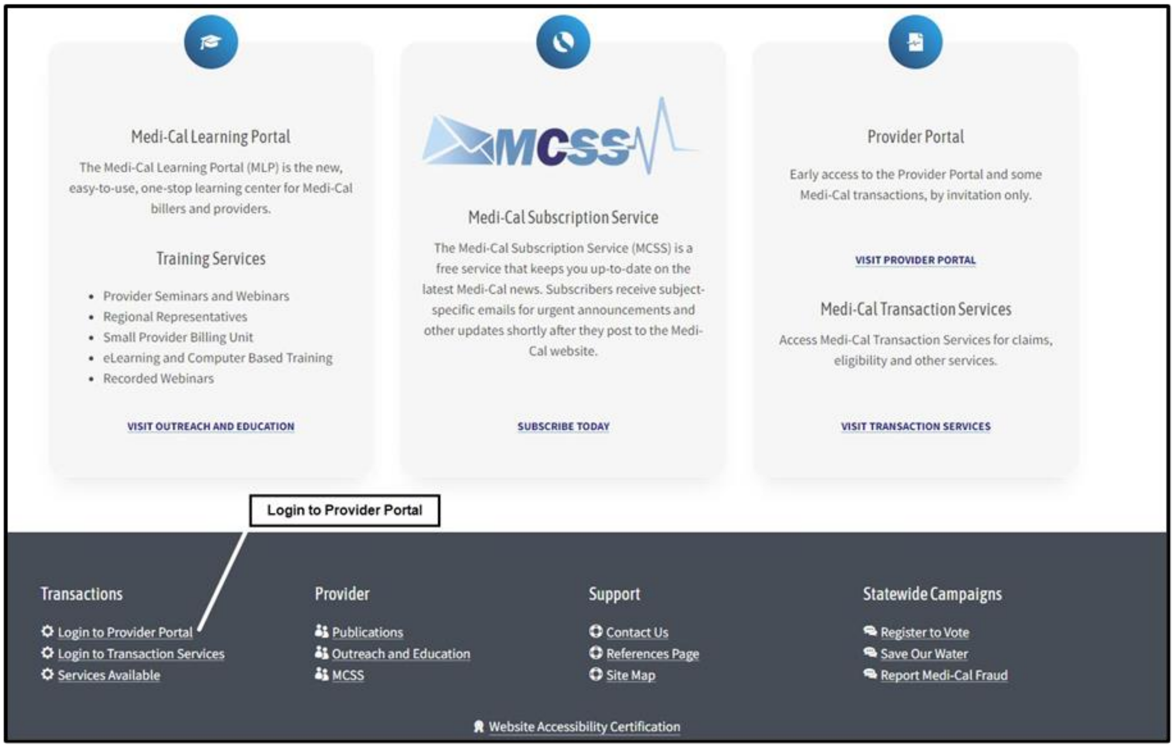


Figure 2.5: Login to Provider Portal link under the Transactions category.

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

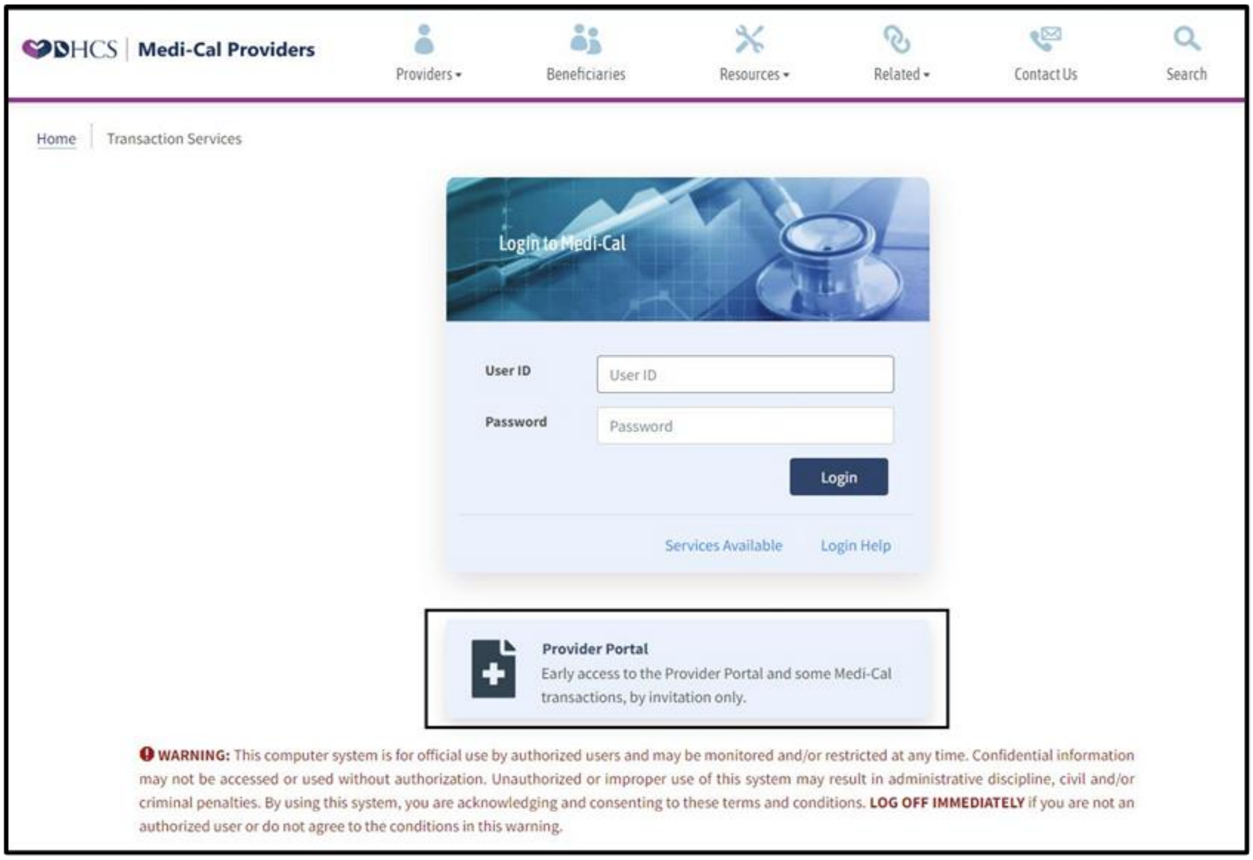


Figure 2.6: The **Provider Portal** link can be found on the Transactions Services login screen.

Logging into the Provider Portal

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

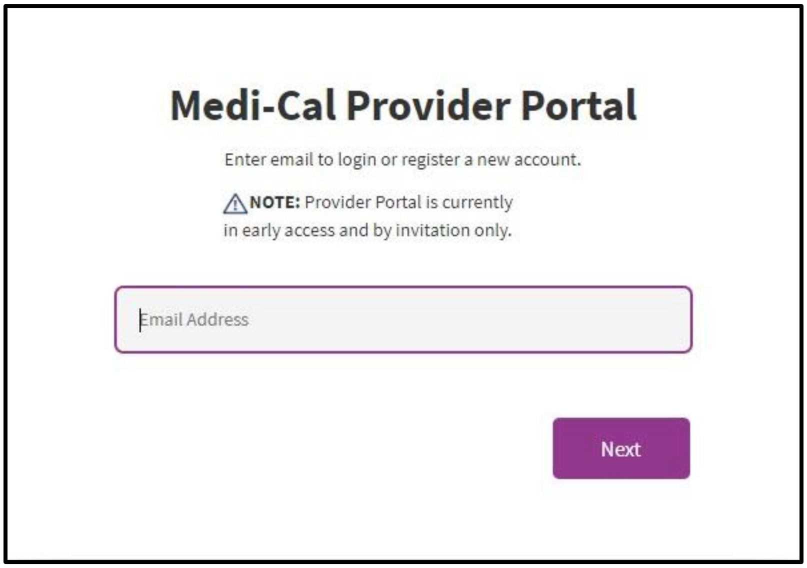


Figure 3.1: Enter Email address page to login to Medi-Cal Provider Portal.

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

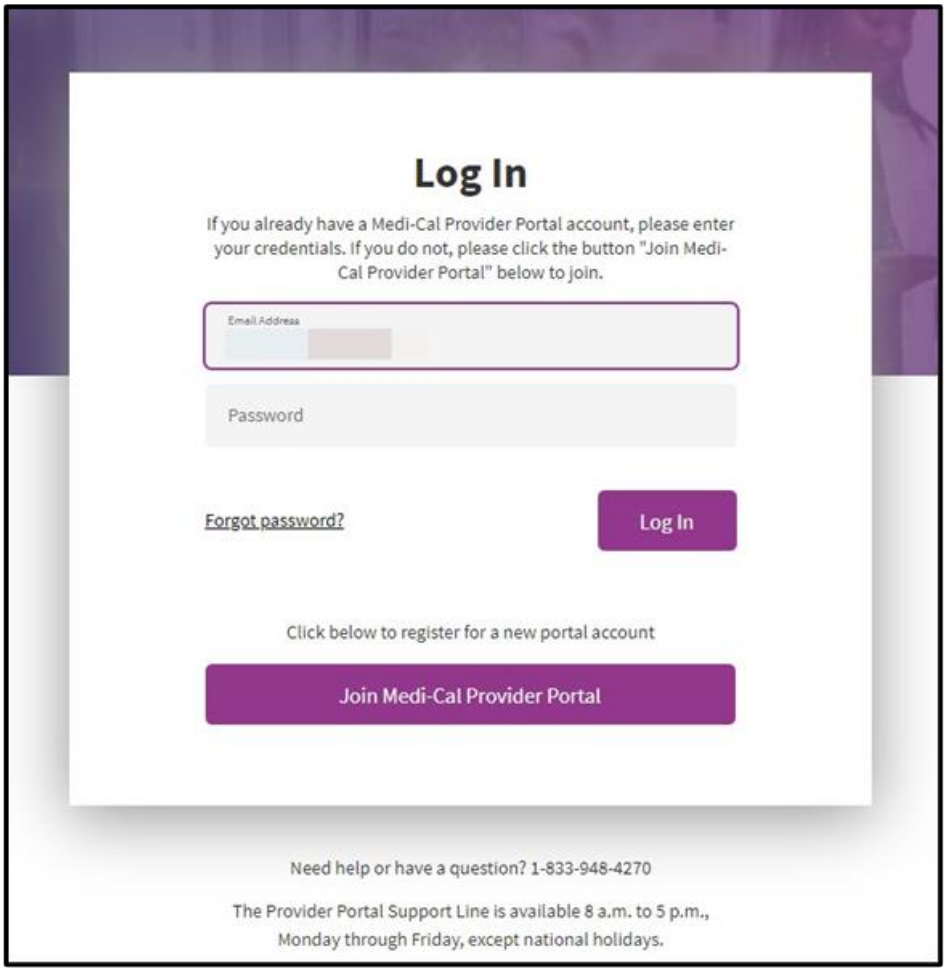


Figure 3.2: Select **Log In** after entering the password.

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?**

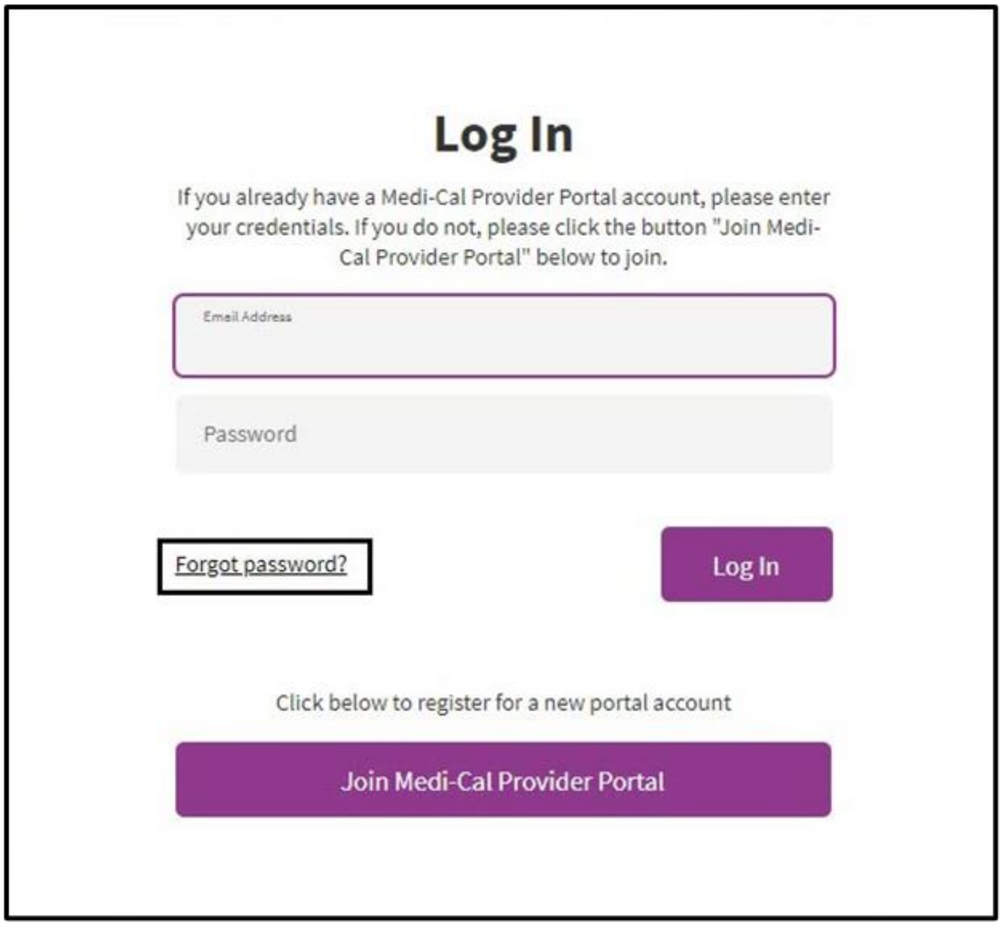


Figure 3.3: On the Log In screen select "**Forgot password?**"

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

Figure 3.4: Reset Password option.

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**.

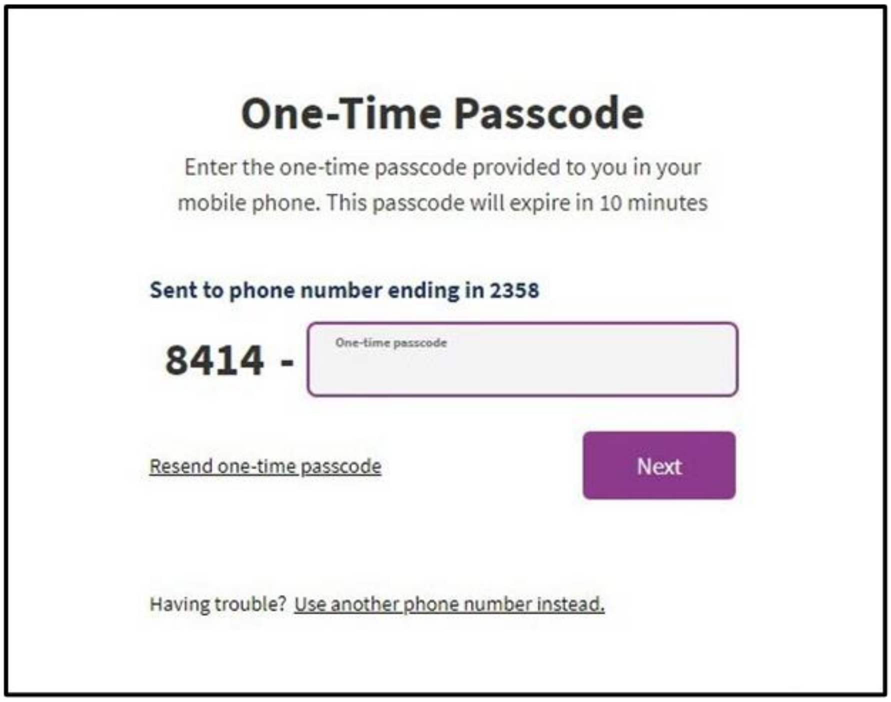


Figure 3.6: One-Time Passcode page to reset password.

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.

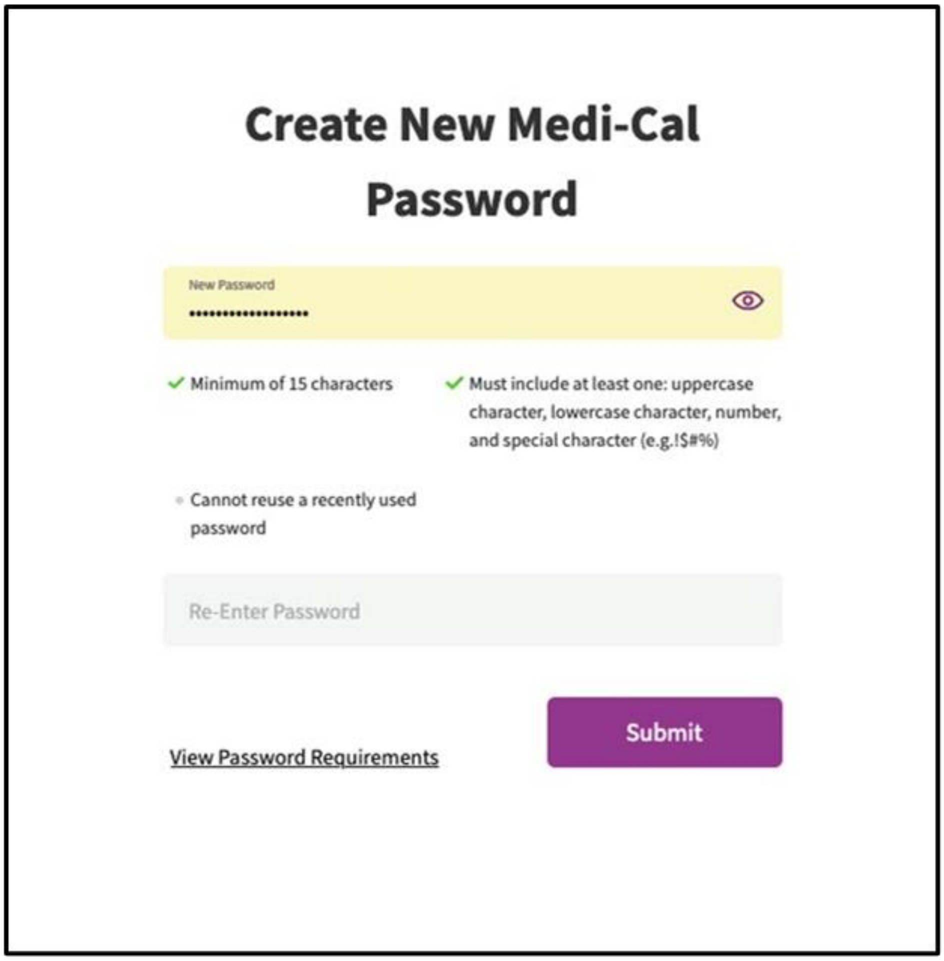


Figure 3.7: Select **Submit** after entering a new password on the Create a New Medi-Cal Password page.

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.

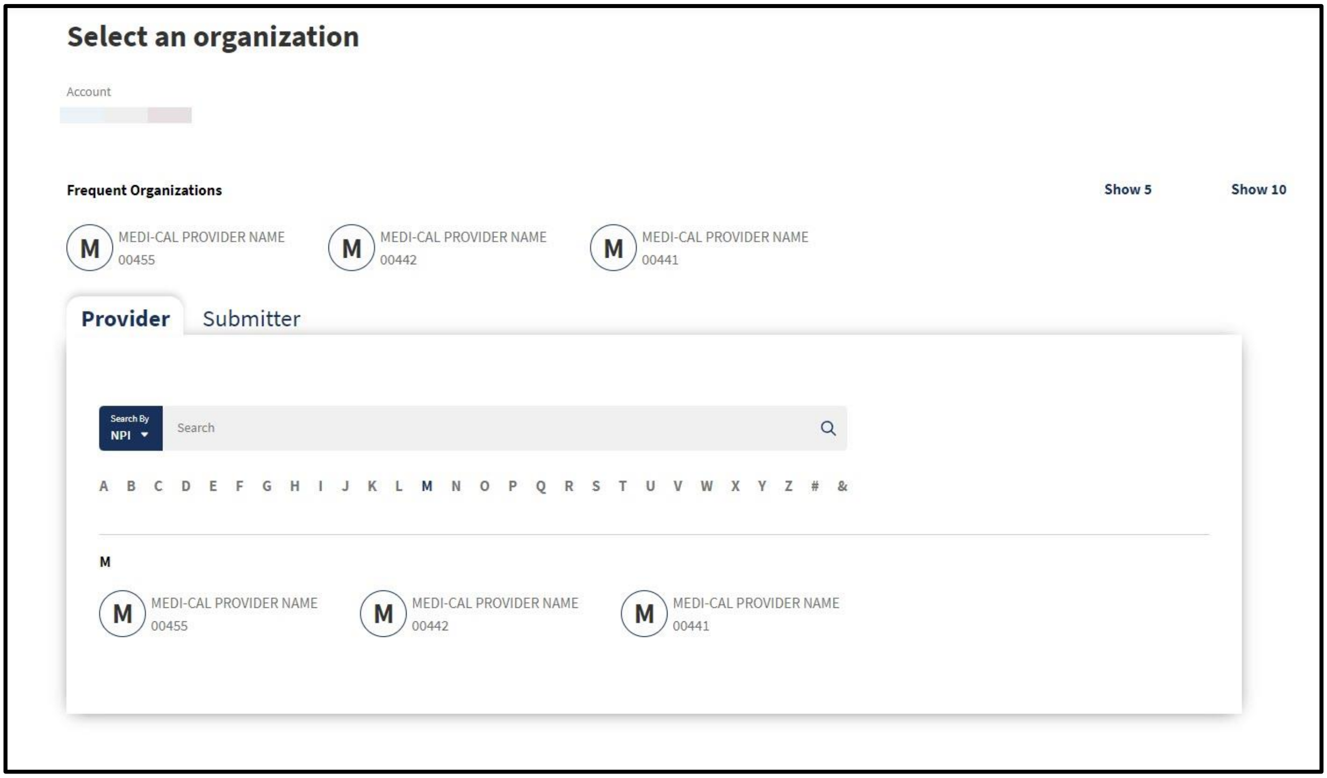


Figure 3.8: Select an organization screen.

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.

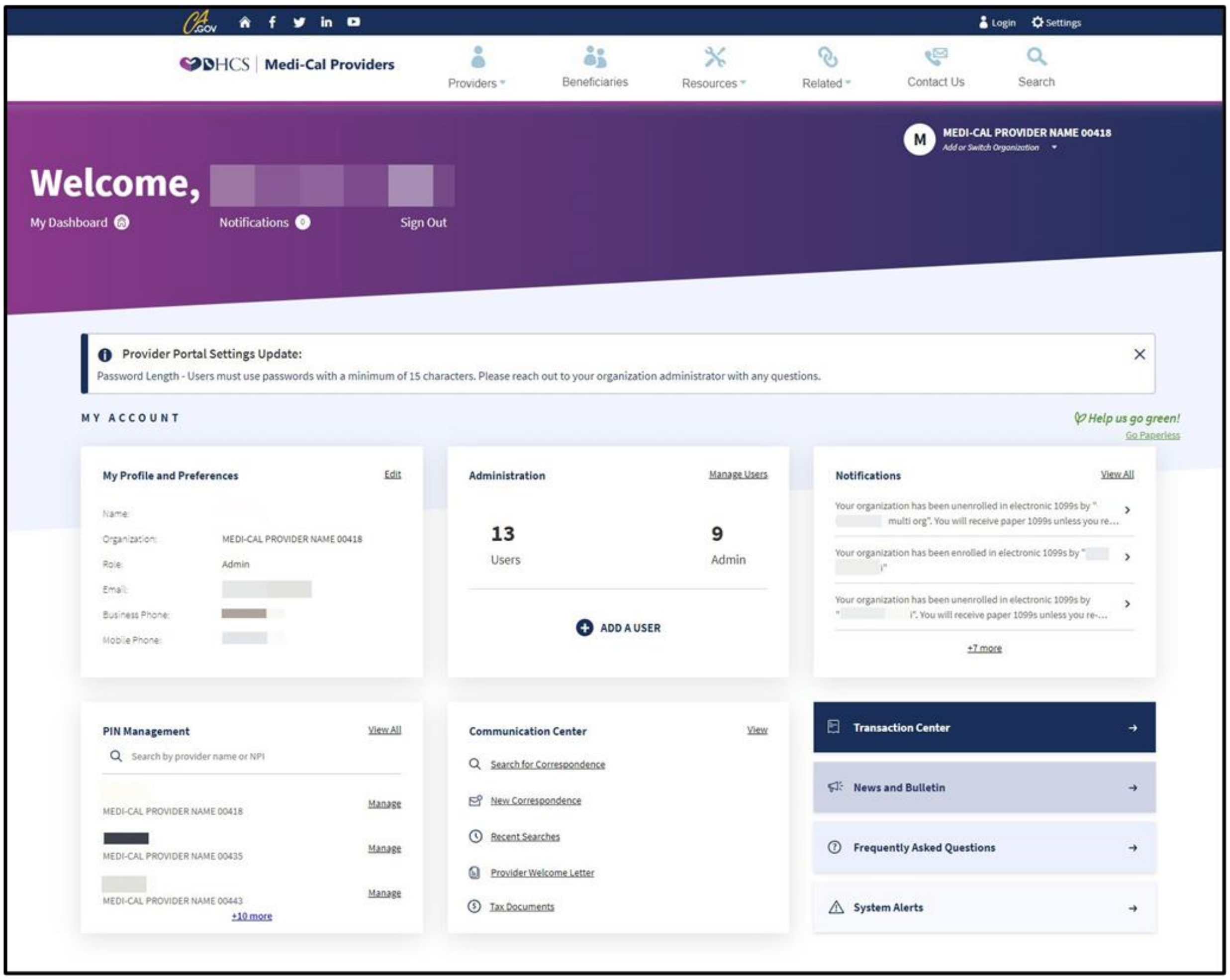


Figure 4.1: Provider Portal homepage.

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.

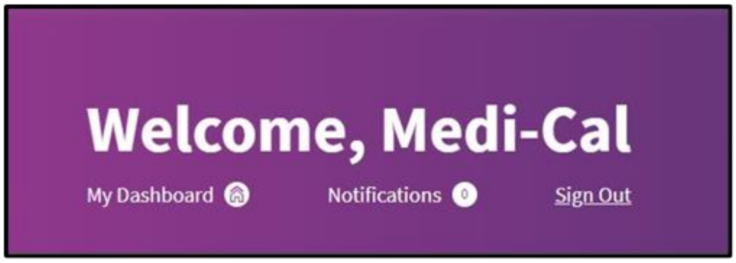


Figure 4.2: Options available in the upper left corner.

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.

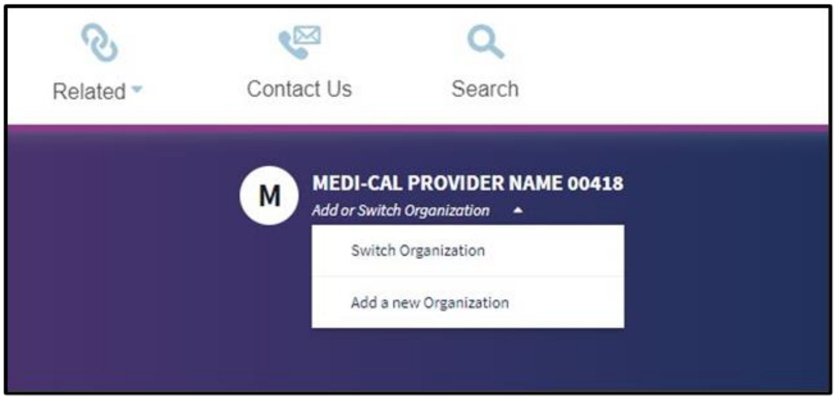


Figure 4.3: Drop-down menu options to add or switch organization.

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.**

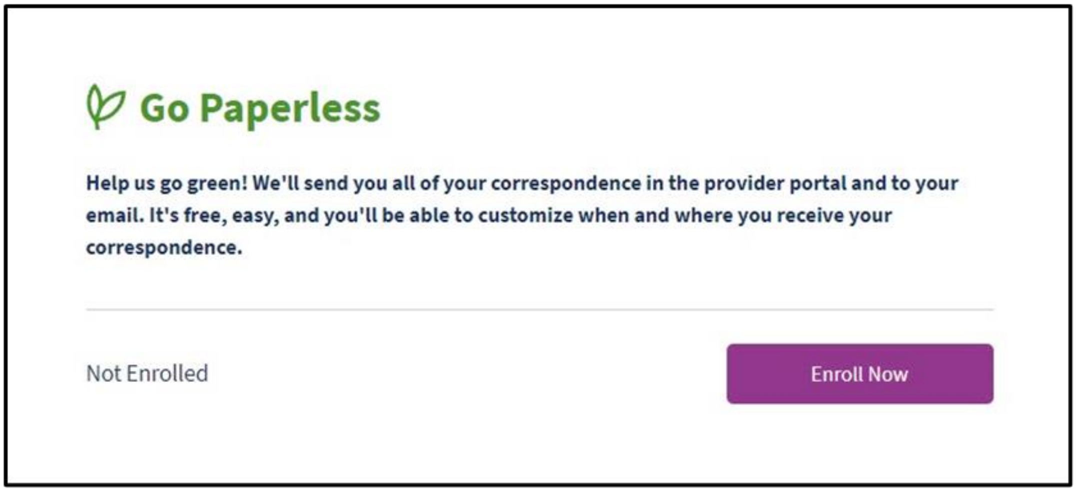


Figure 4.5: Go Paperless page with Enroll Now selection.

The user will receive a successfully enrolled message.

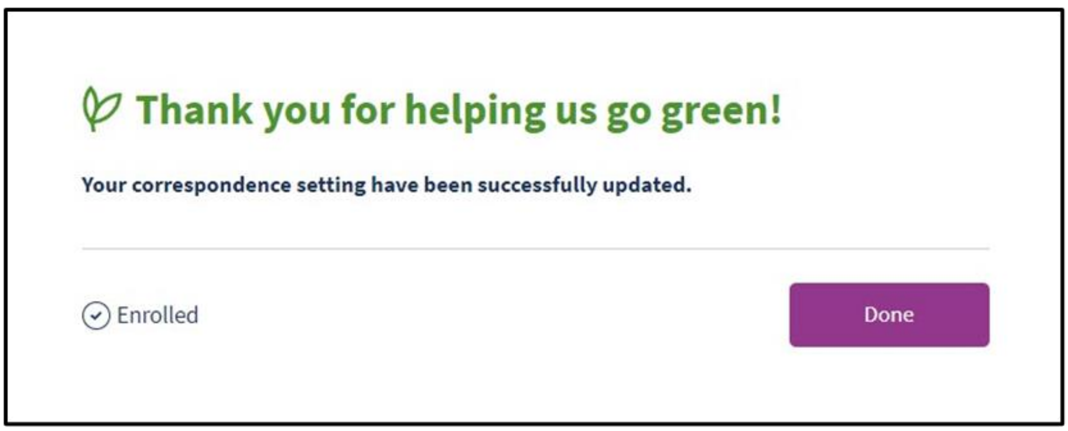


Figure 4.6: Successfully enrolled in paperless correspondence message.

Account Tiles

My Profile and Preferences

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

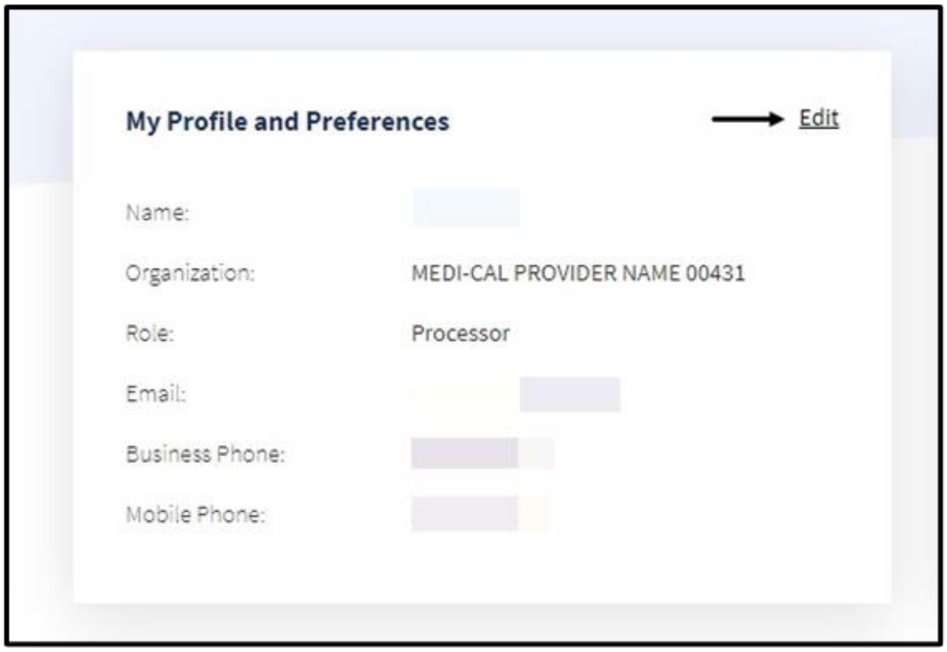


Figure 5.1: Select **Edit** to change user's profile and preferences.

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.

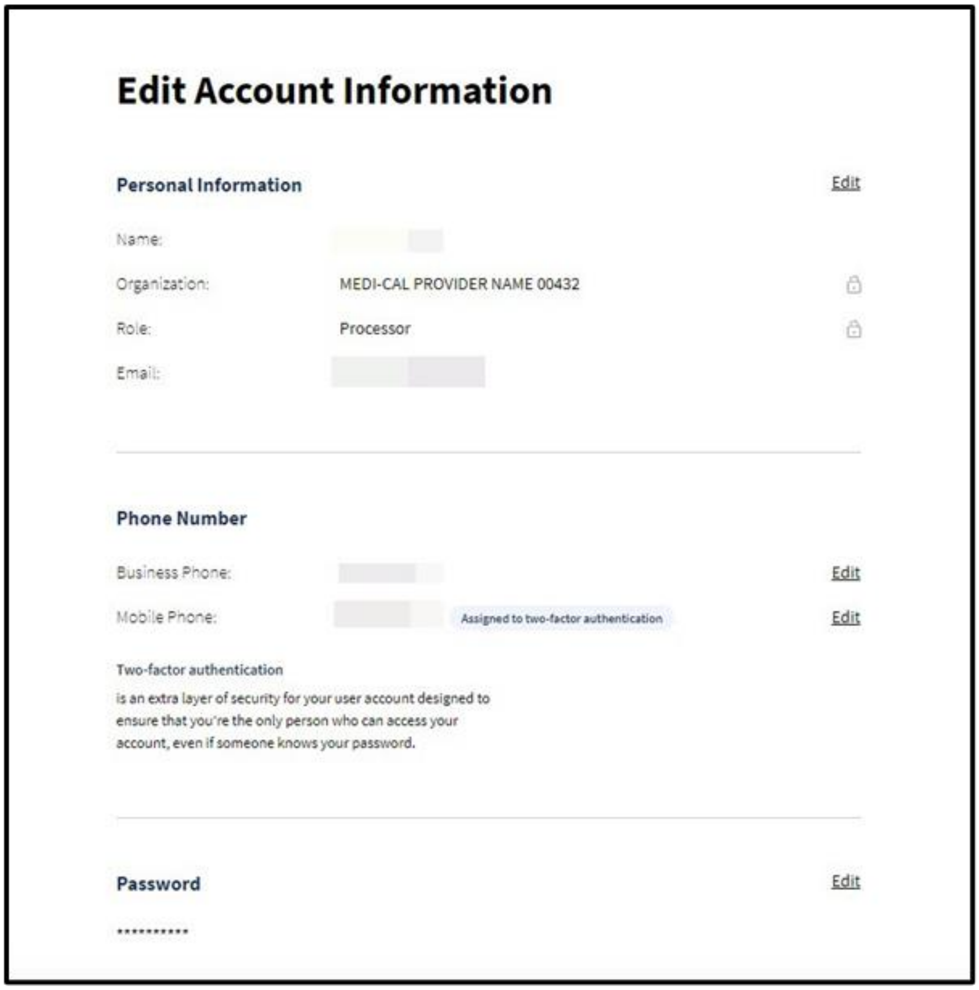


Figure 5.2: Edit Account Information page.

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**.

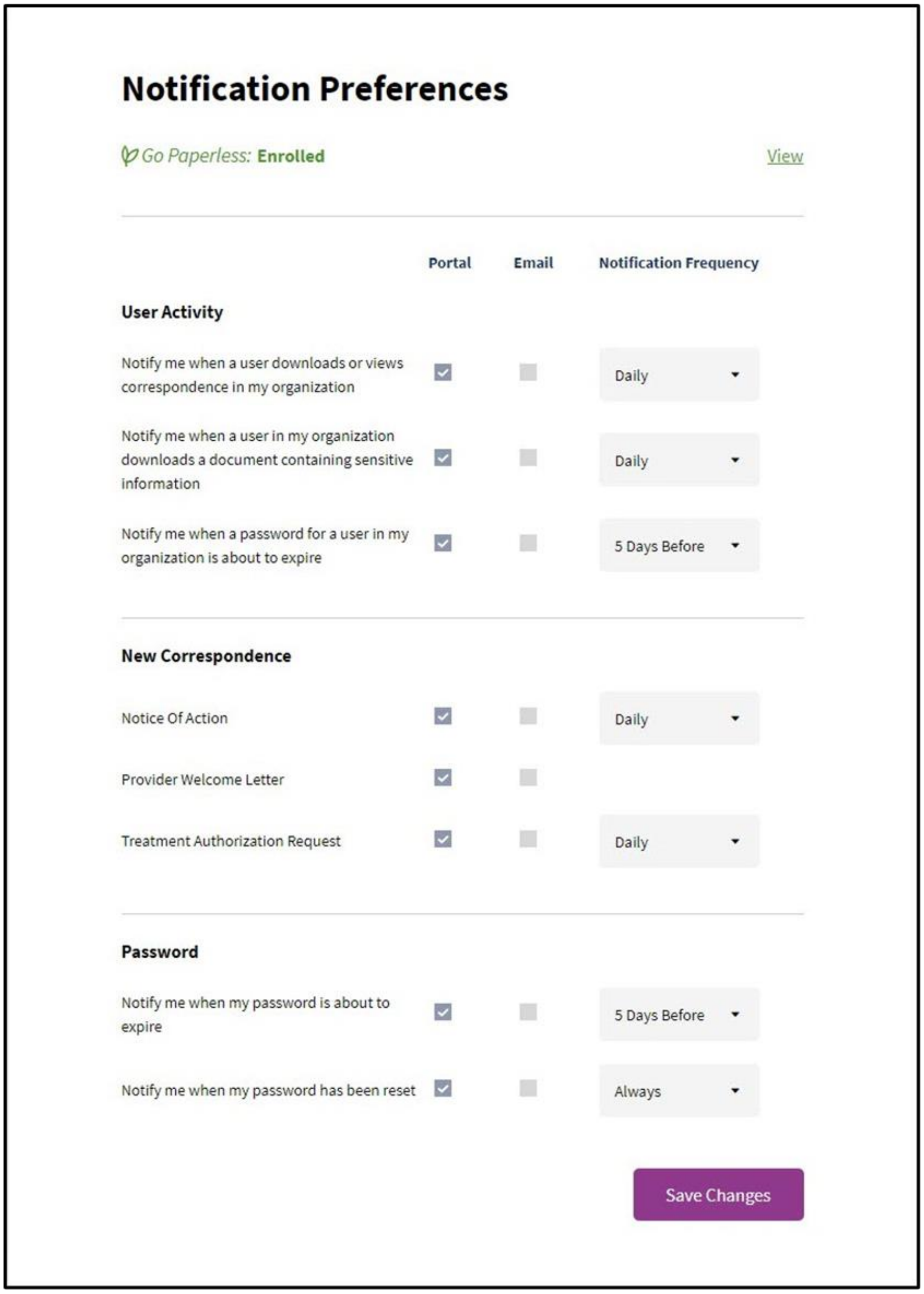


Figure 5.3: Notification Preferences page for Org Admins.

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.

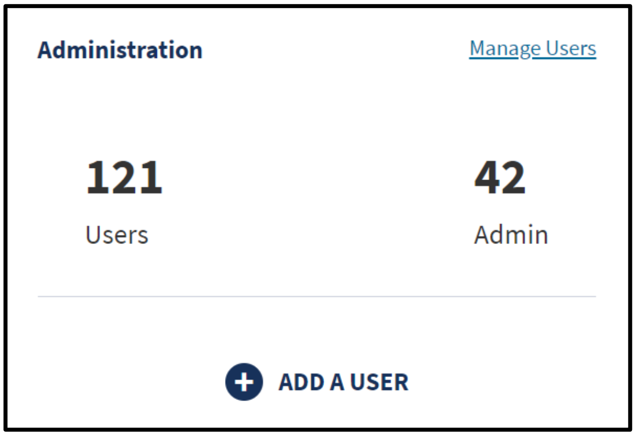


Figure 5.4: Administration area of the Portal home page.

Update User Information/Permissions

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

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

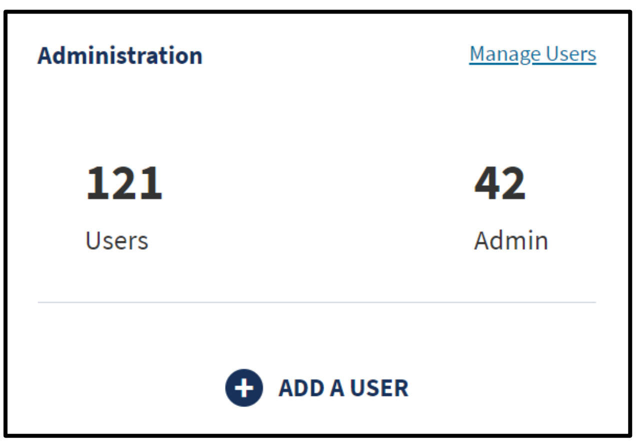


Figure 5.5: Administration area of the Portal home page.

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

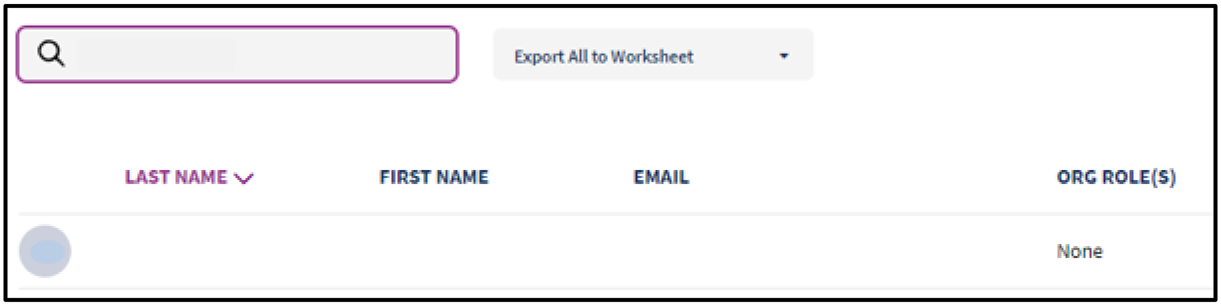


Figure 5.6: User management area for updating user information and permissions.

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.

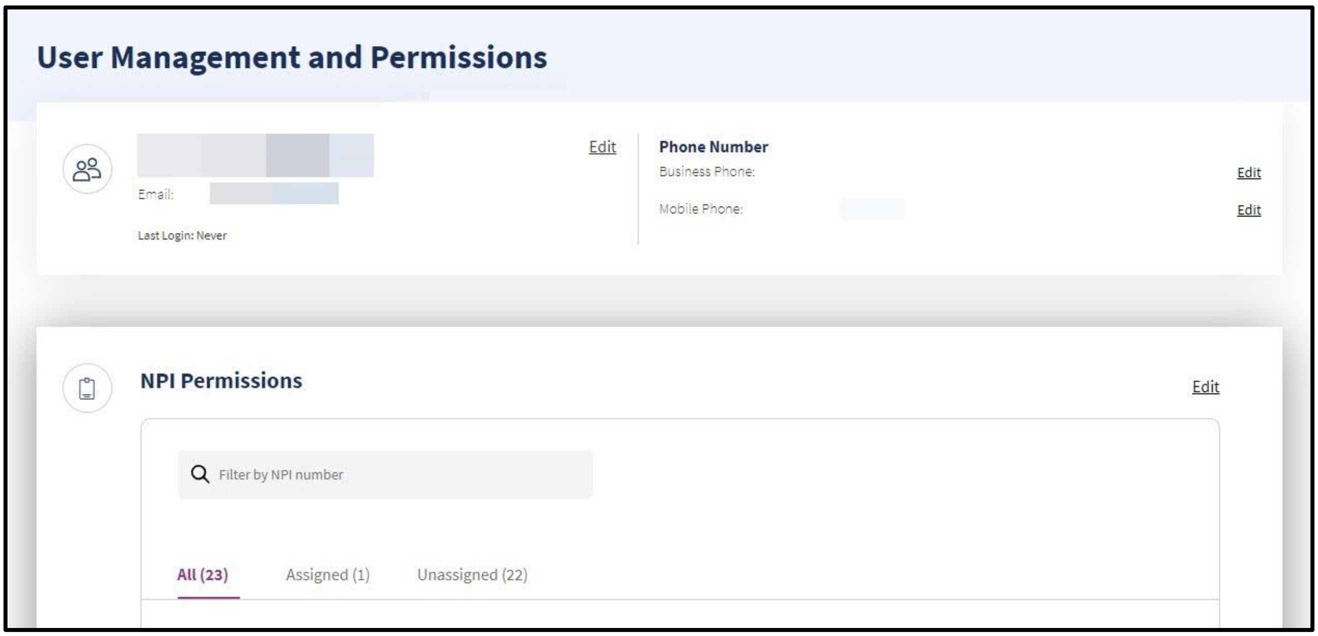


Figure 5.7: User management and permissions area.

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.

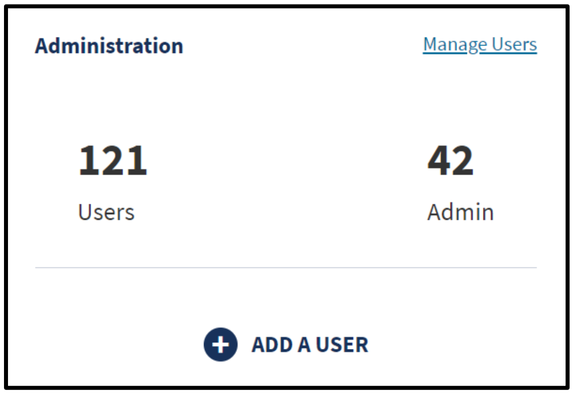


Figure 5.8: Administration area of the Portal home page.

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

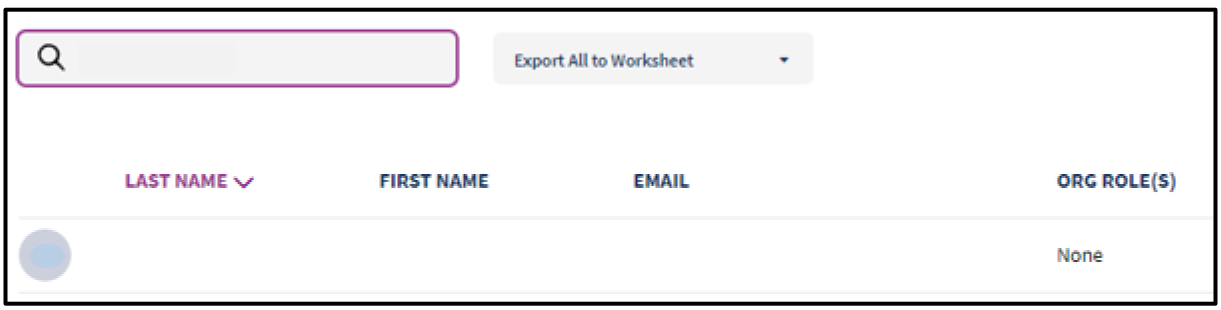


Figure 5.9: User management area for updating user information and permissions.

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.

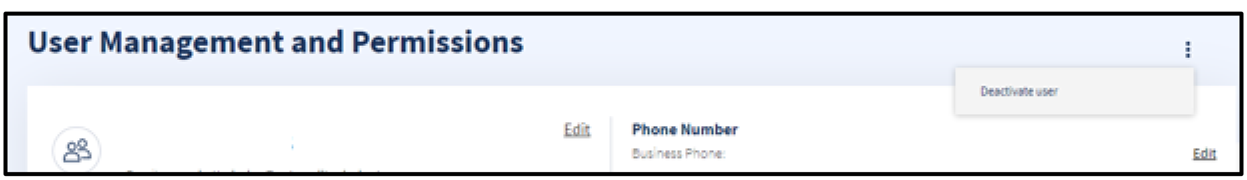


Figure 5.10: User Management and Permissions with the Deactivate User option.

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

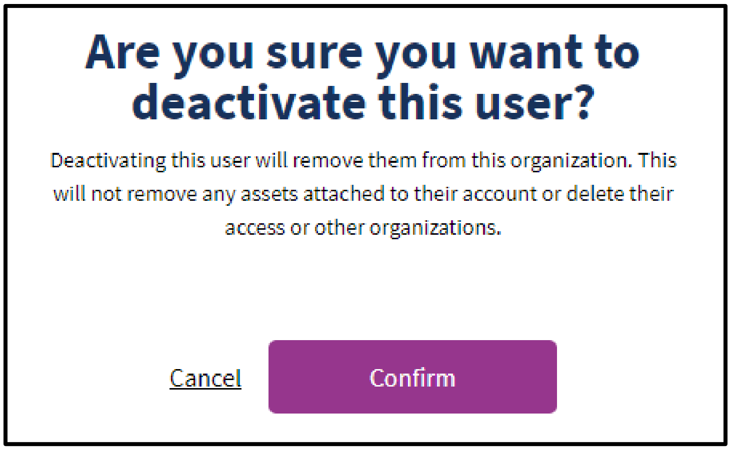


Figure 5.11: Pop-up window prompting to deactivate this user.

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:

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

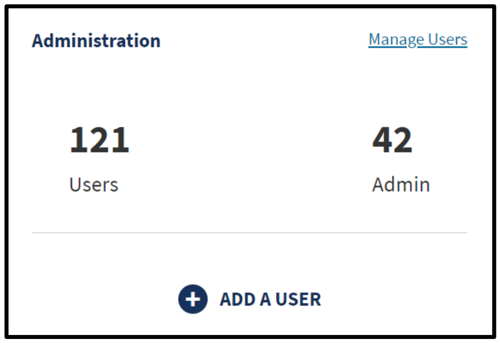


Figure 5.13: Administration area of the Portal home page.

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

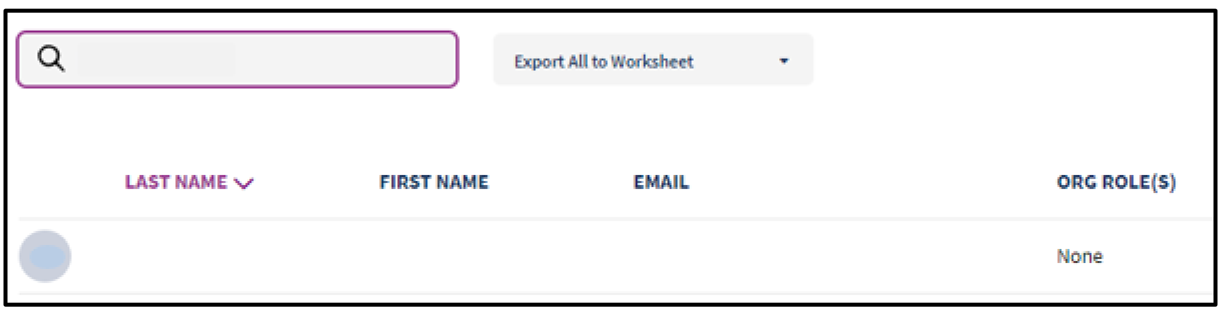


Figure 5.14: User management area for updating user information and permissions.

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

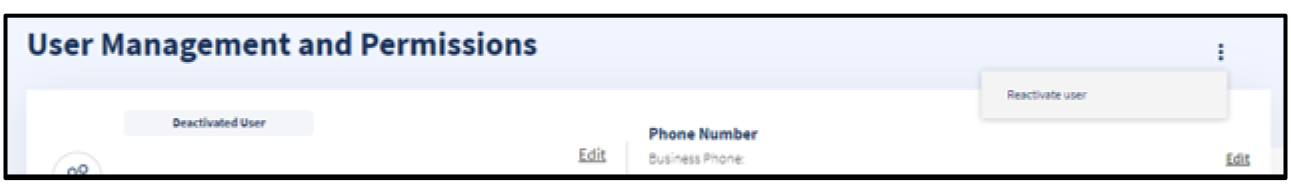


Figure 5.15: User Management and Permissions screen with Reactivate User option.

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

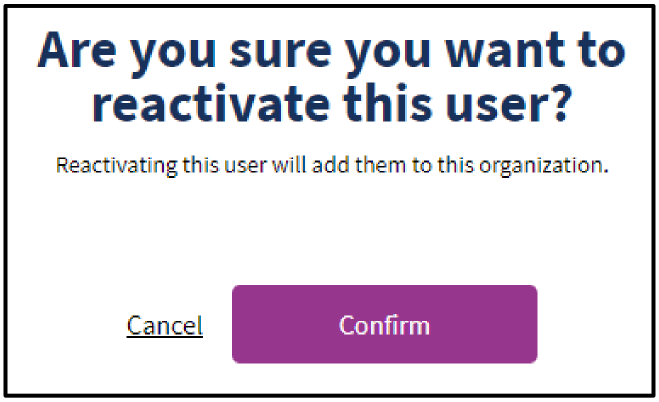


Figure 5.16: A pop-up window prompting to reactivate this user.

8. 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.

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

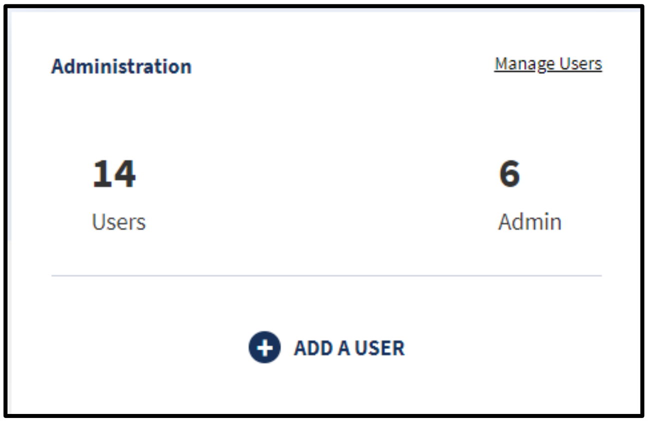


Figure 6.1: Administration area of the Portal home page.

10. Click **Domain Management**

Figure 6.2: Domain management screen.

11. 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.

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**.

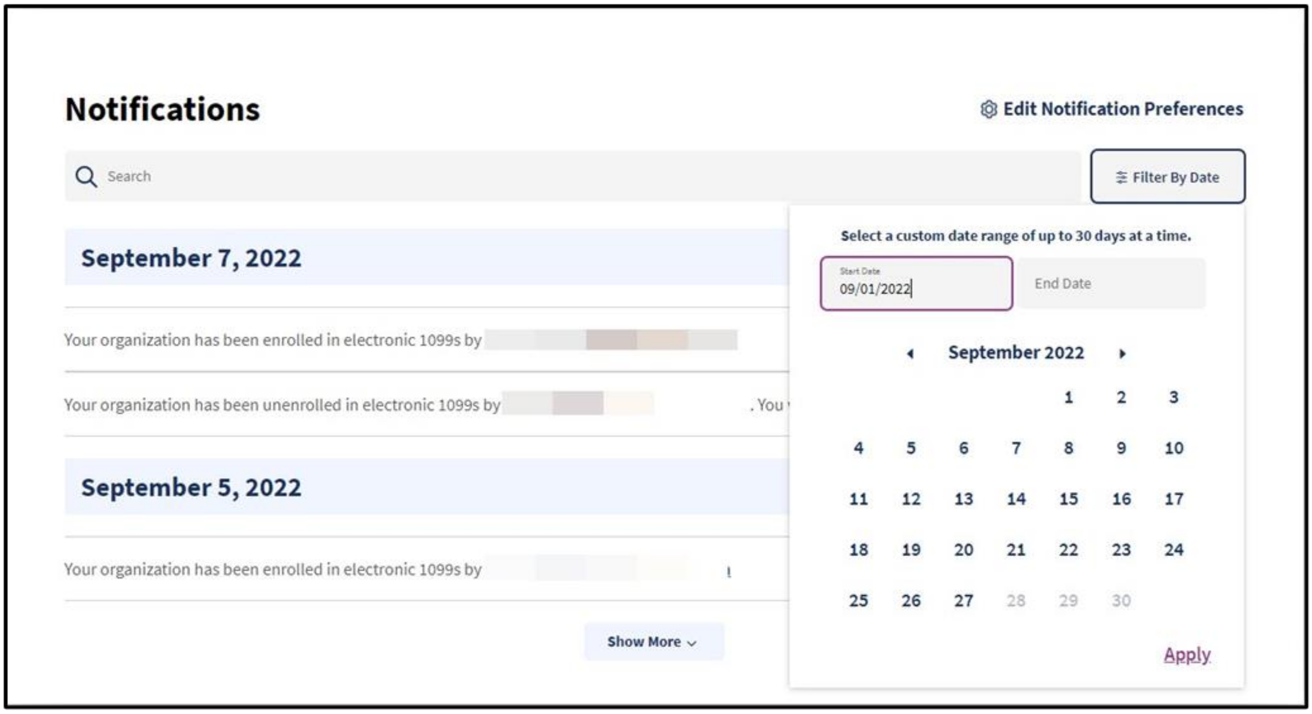


Figure 6.5: The Notifications page with **Edit Notification Preferences** link in the upper right corner.

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**.

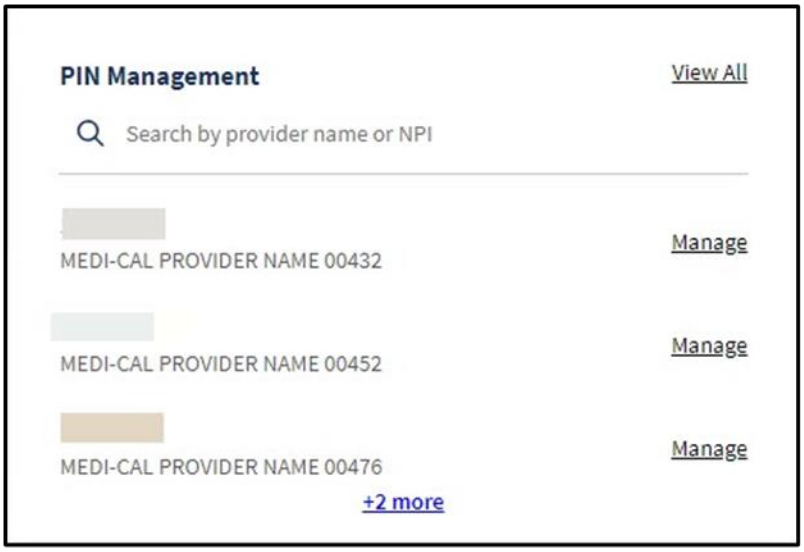


Figure 6.6: PIN Management tile.

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.

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.

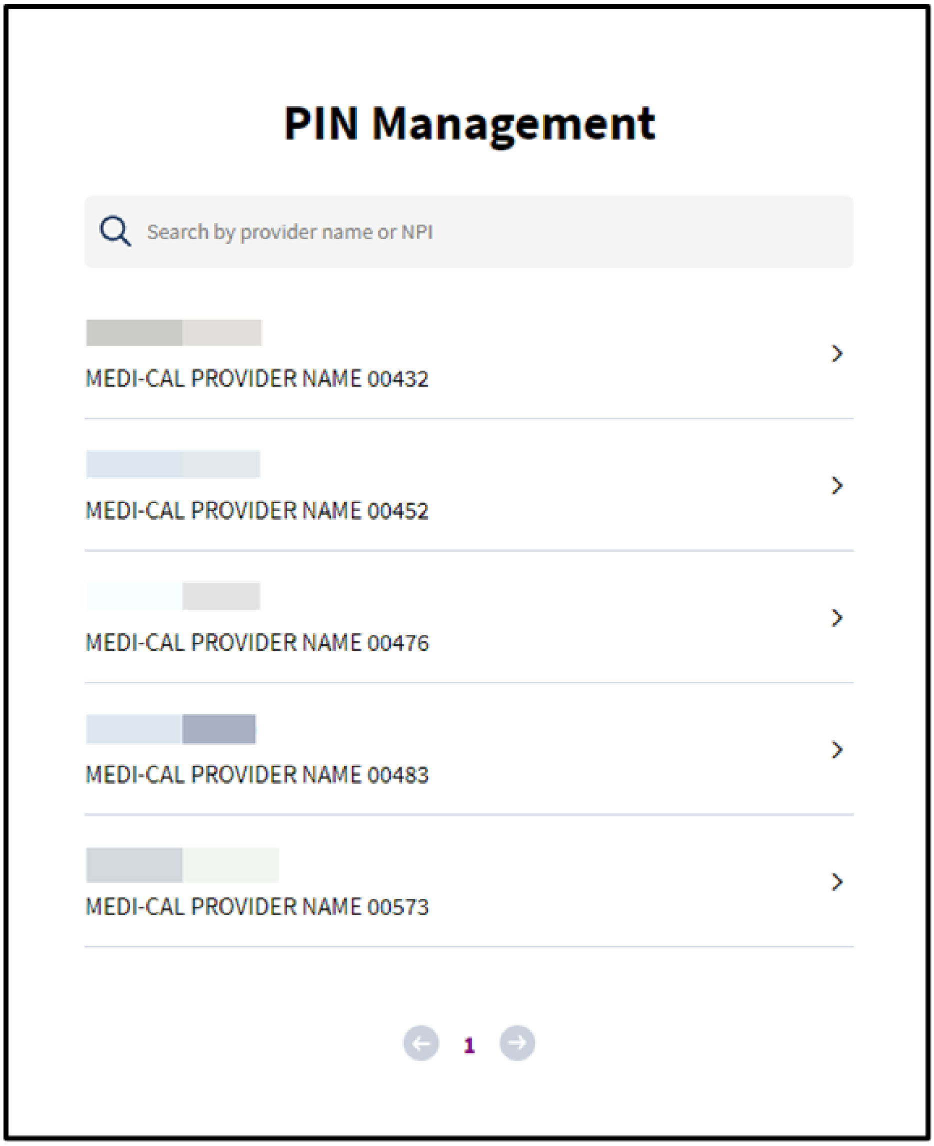


Figure 6.8: Search by provider name or NPI.

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.

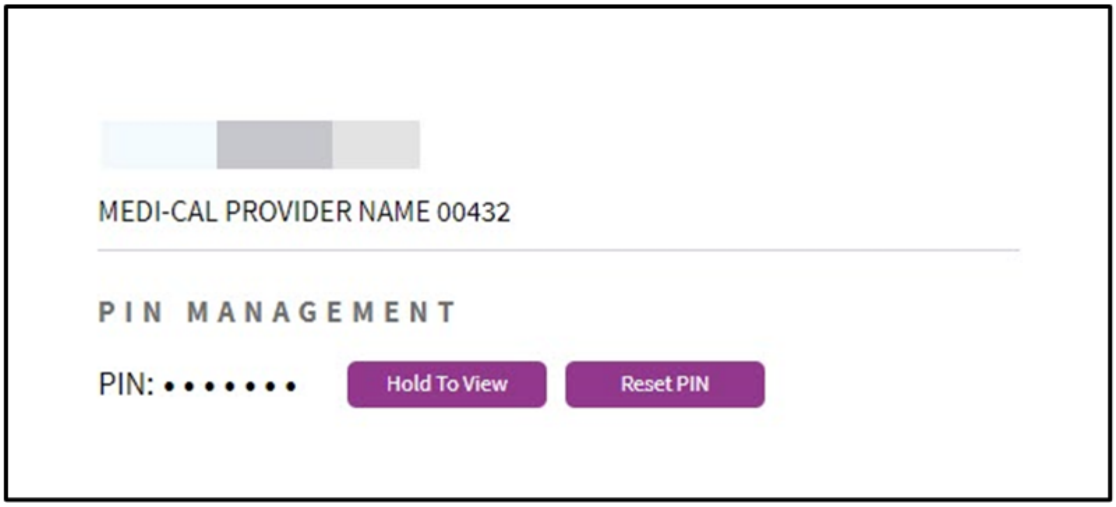


Figure 6.9: View PIN number and **Reset PIN**.

Communication Center

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

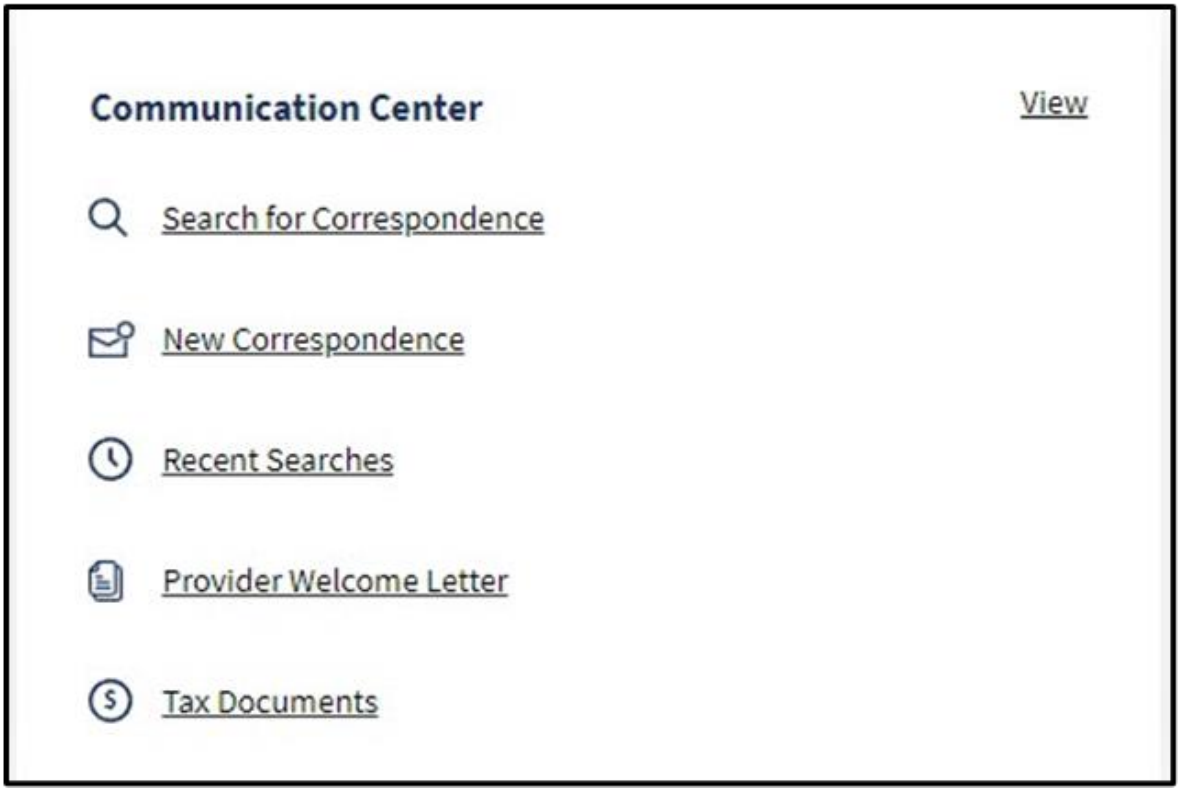


Figure 6.10: Communication Center tile.

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

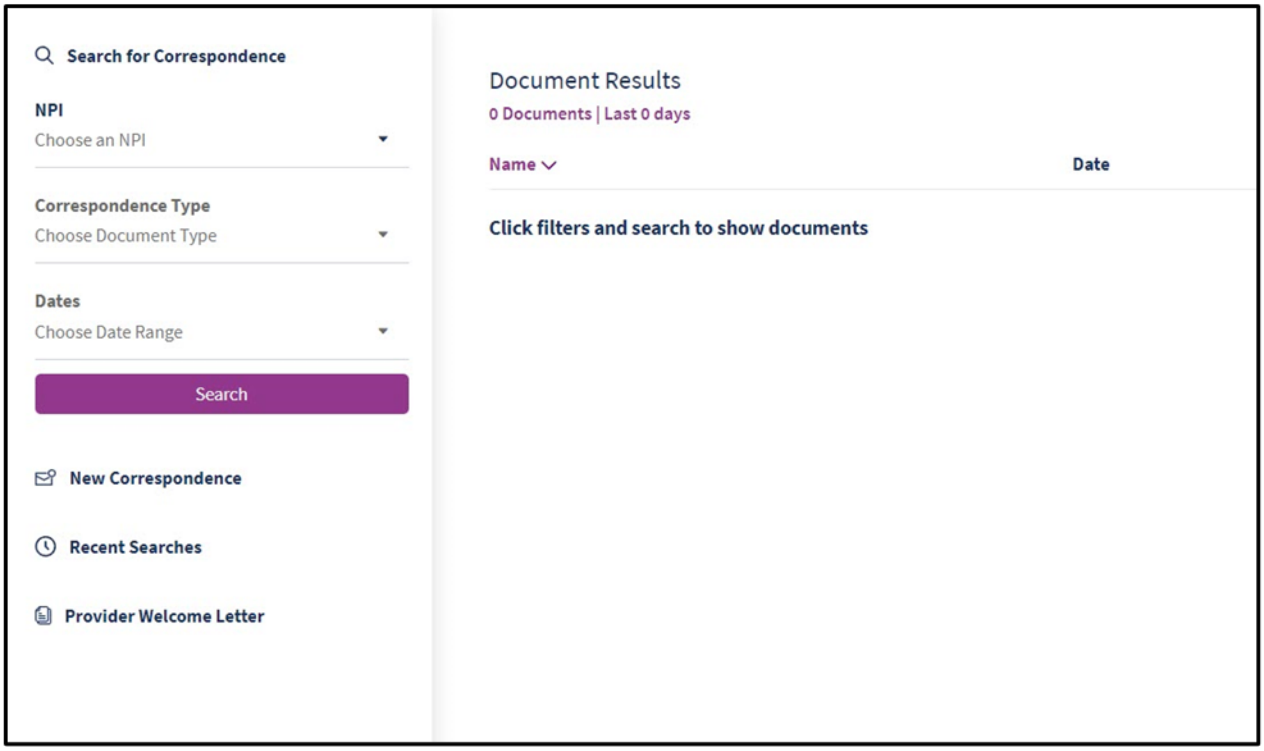


Figure 6.11: Search for Correspondence screen.

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

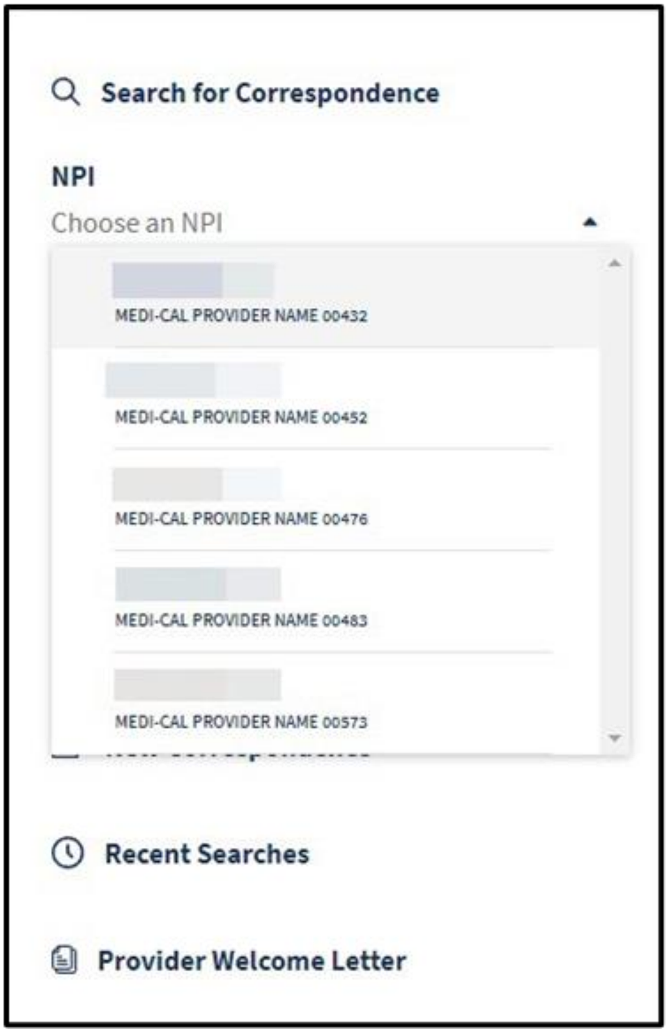


Figure 6.12: Search for Correspondence screen with **NPI** selected.

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

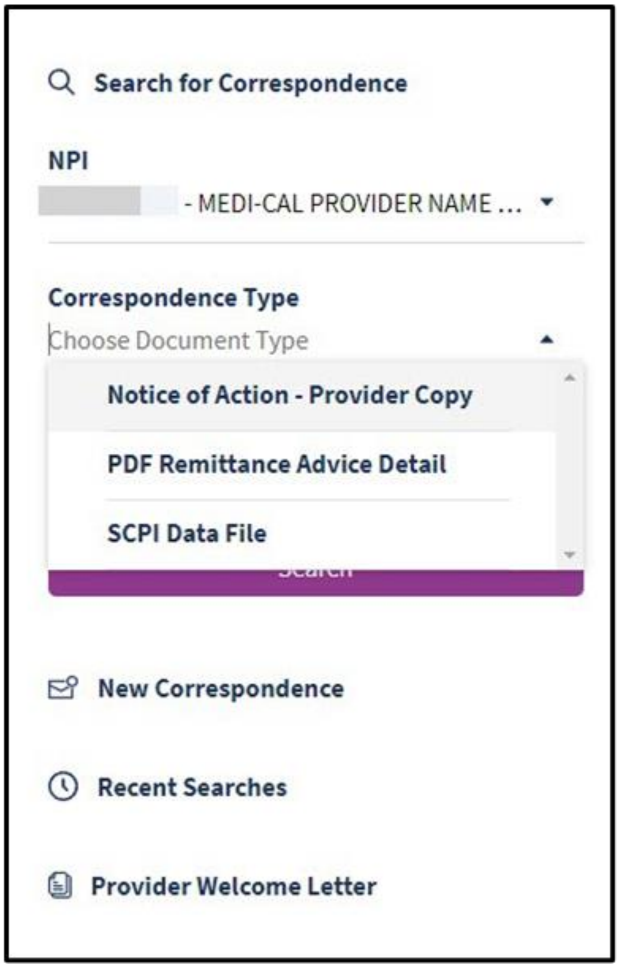


Figure 6.13: Search for Correspondence screen with **Correspondence Type** selected from the NPI search list.

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

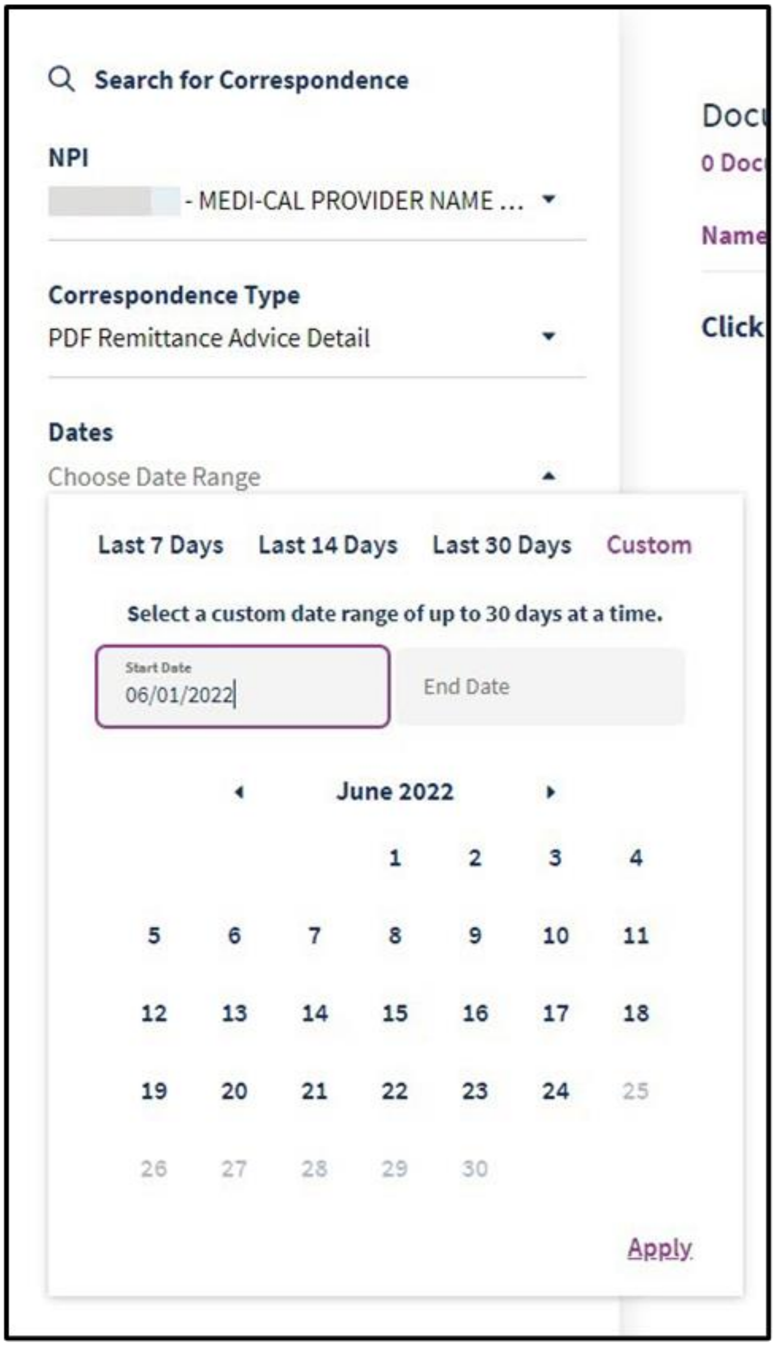


Figure 6.14: Data Range selected on the Search for Correspondence screen.

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.

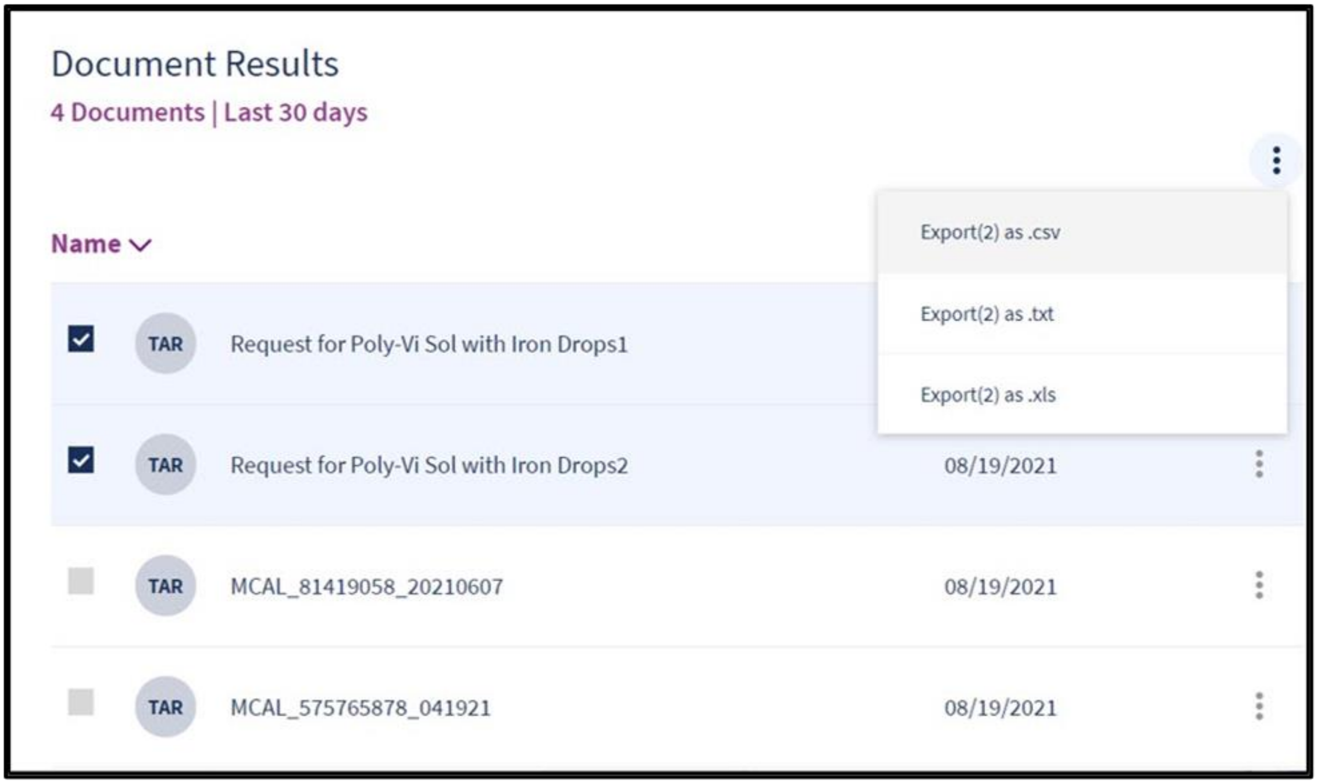


Figure 6.15: Search results displayed on the **Document Results** page.

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.

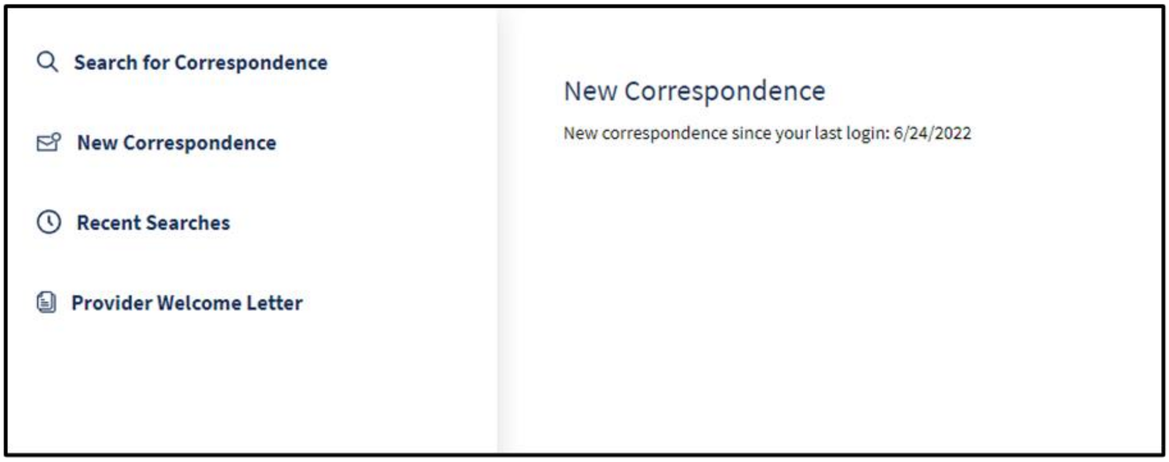


Figure 6.16: New Correspondence listed.

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

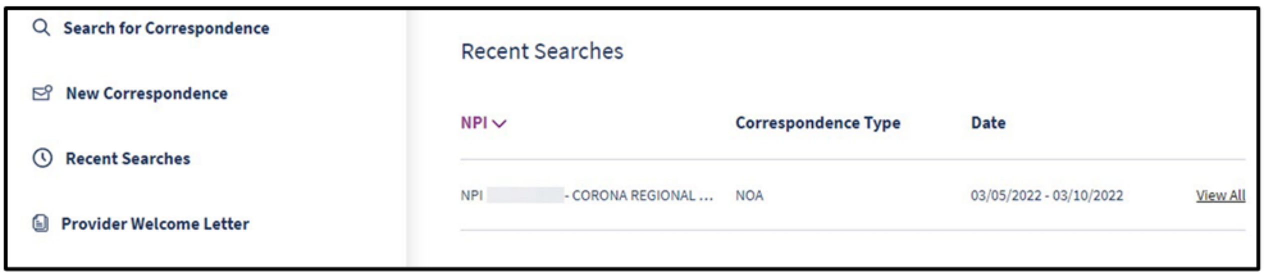


Figure 6.17: Recent Searches displayed.

Provider Welcome Letter

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

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

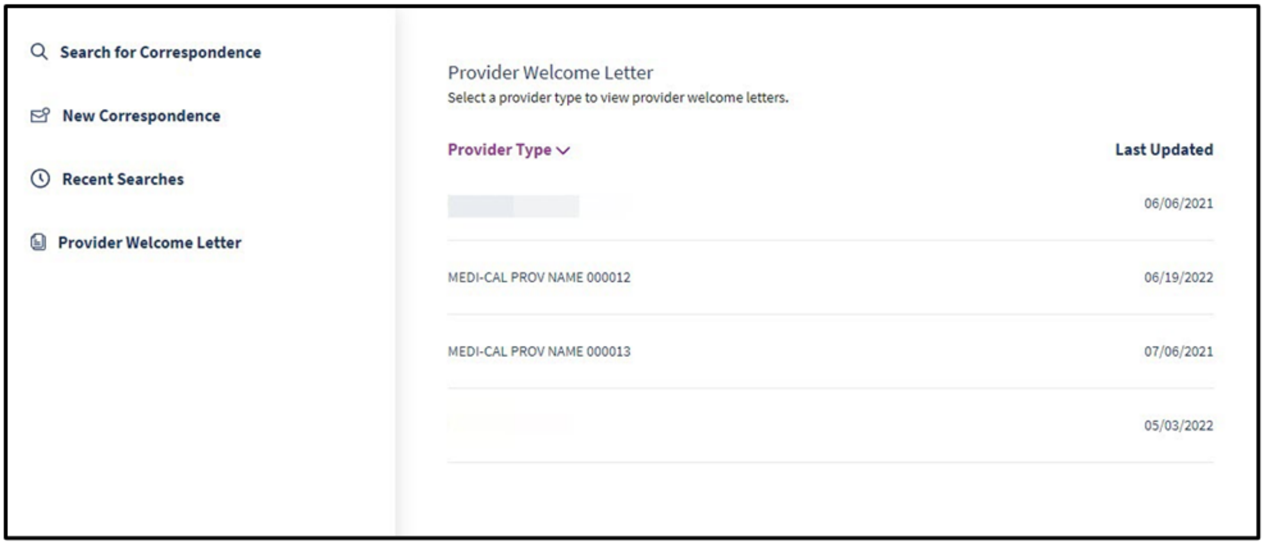


Figure 7.1: Provider Welcome Letter selected from the Communication Center tile.

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

Figure 7.2: Provider Welcome Letter displayed.

14. A PDF version of the letter appears.

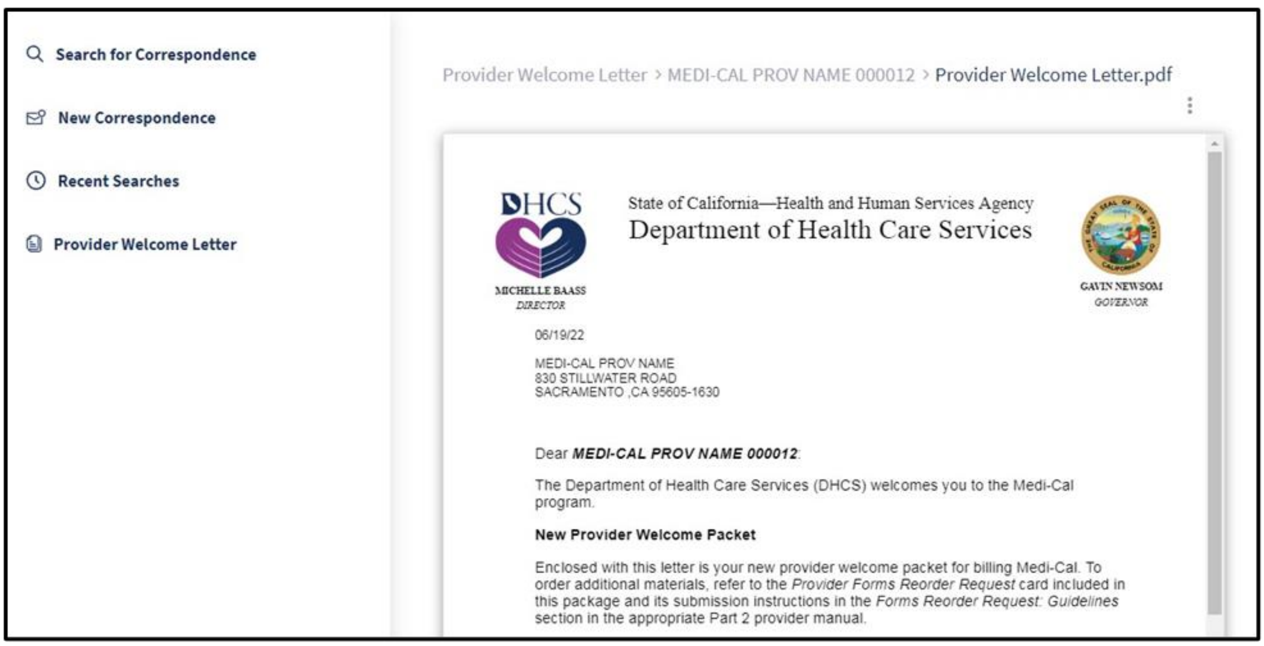
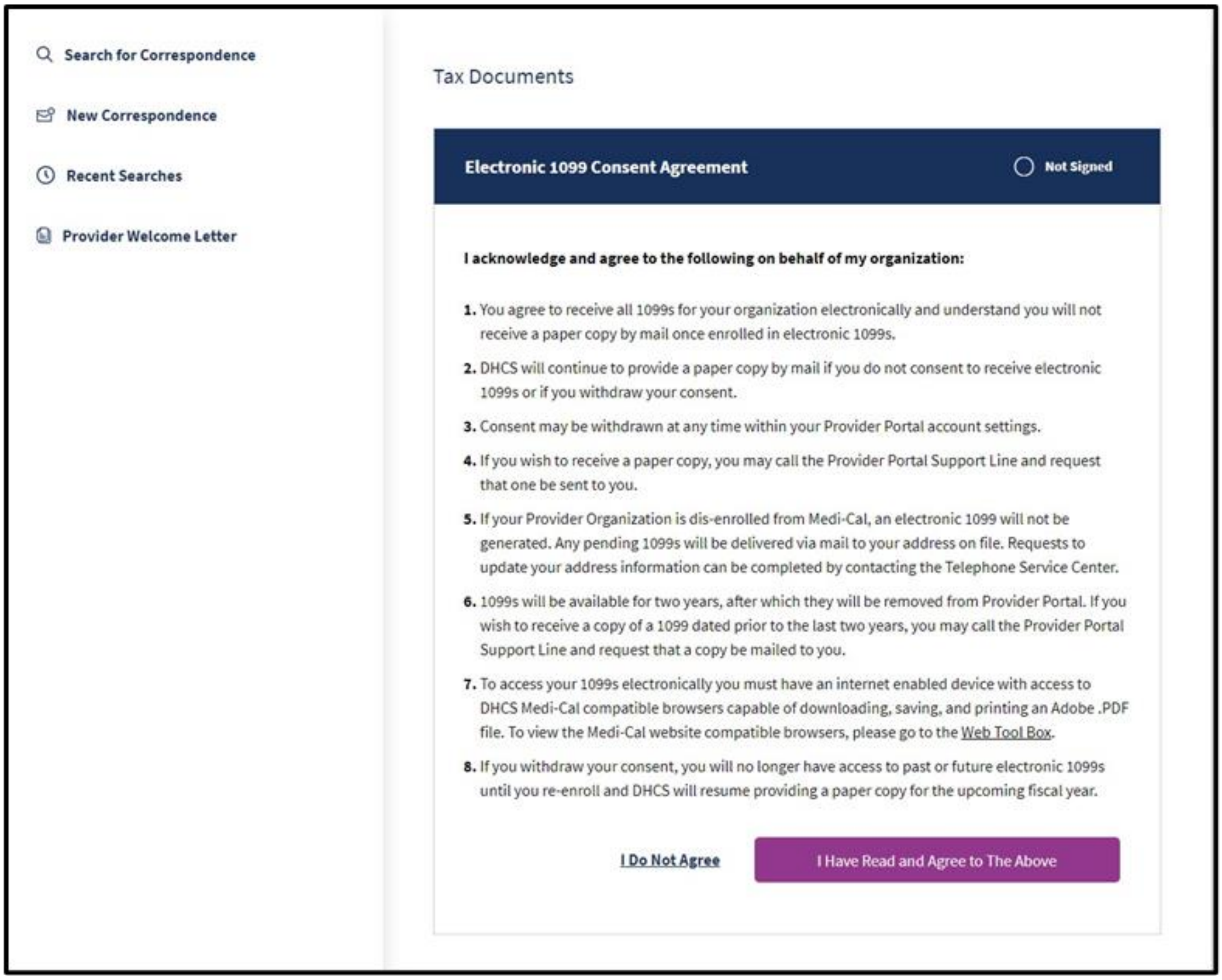


Figure 7.3: PDF version of the Provider Welcome Letter.

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.


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 | I Have Read and Agree to The Above

Figure 8.1: Electronic 1099 Consent Agreement form.

Next, a list of tax documents will appear.

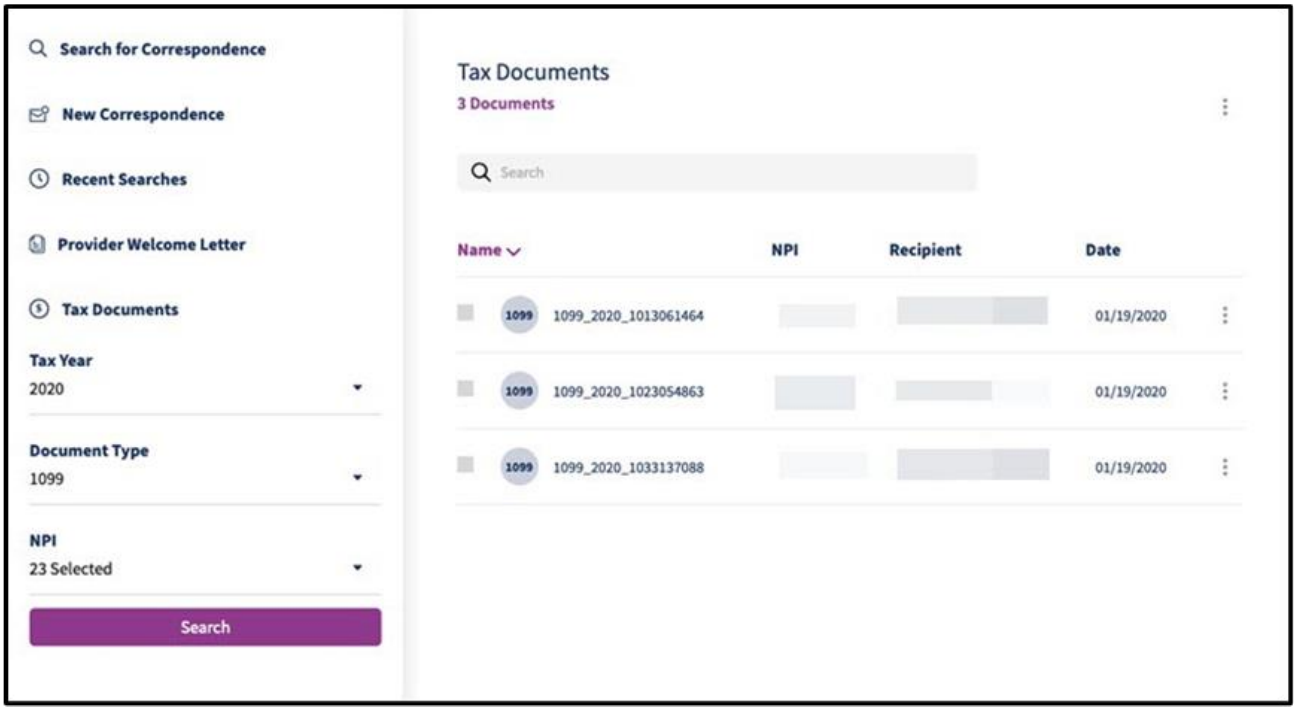


Figure 8.2: A list of tax documents on the Tax Documents screen.

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.

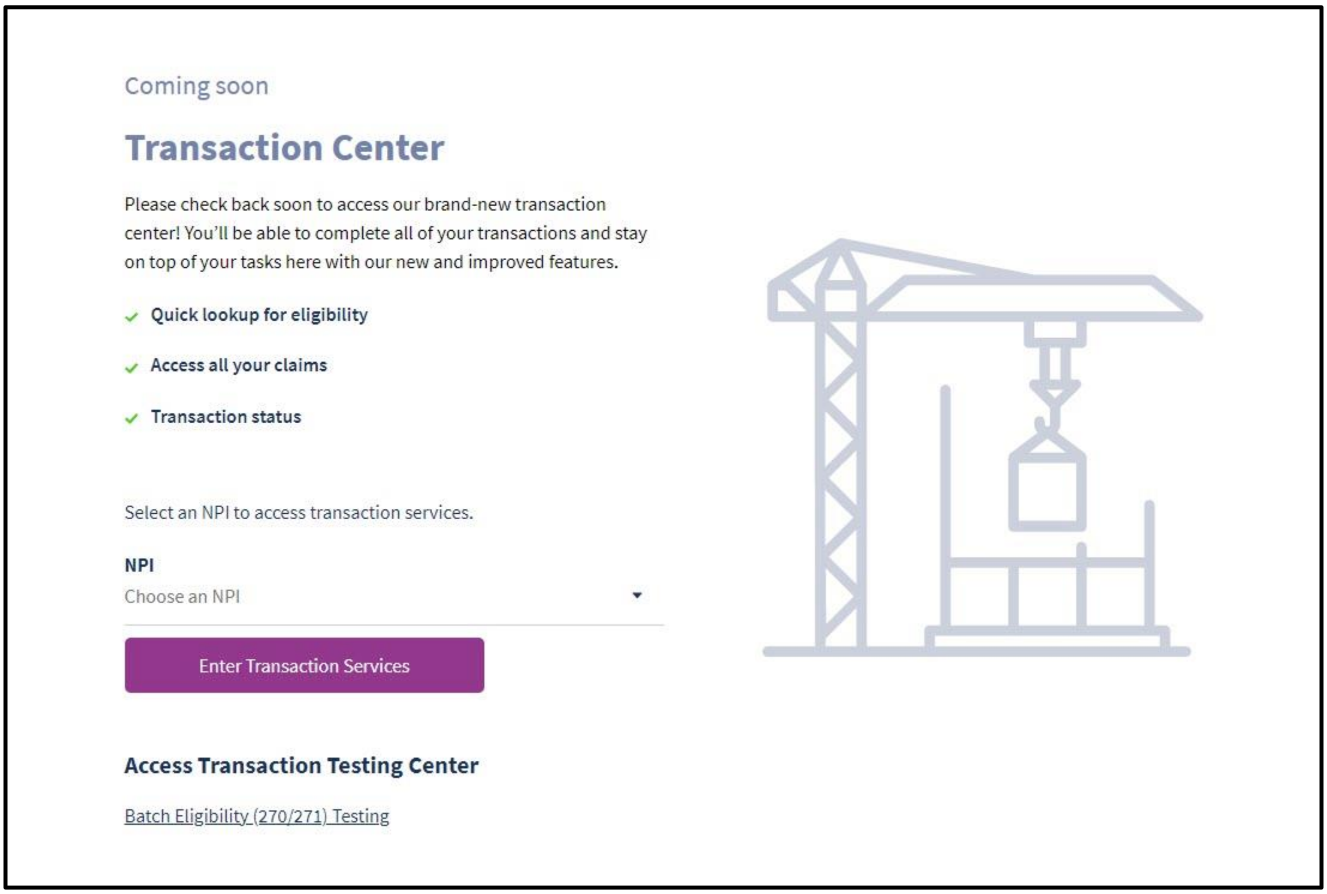


Figure 9.1: Transaction Center coming soon screen.

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

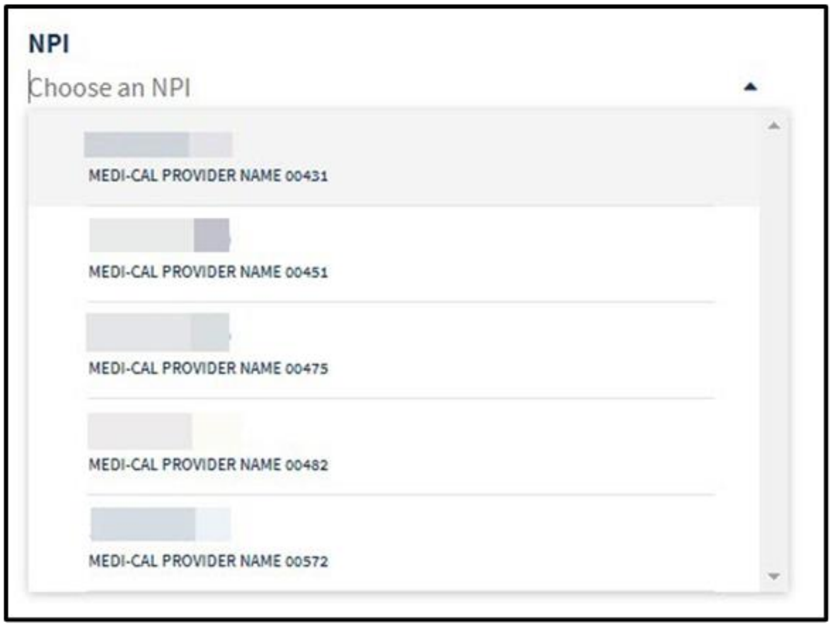


Figure 9.2: Drop-down menu of NPIs.

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.

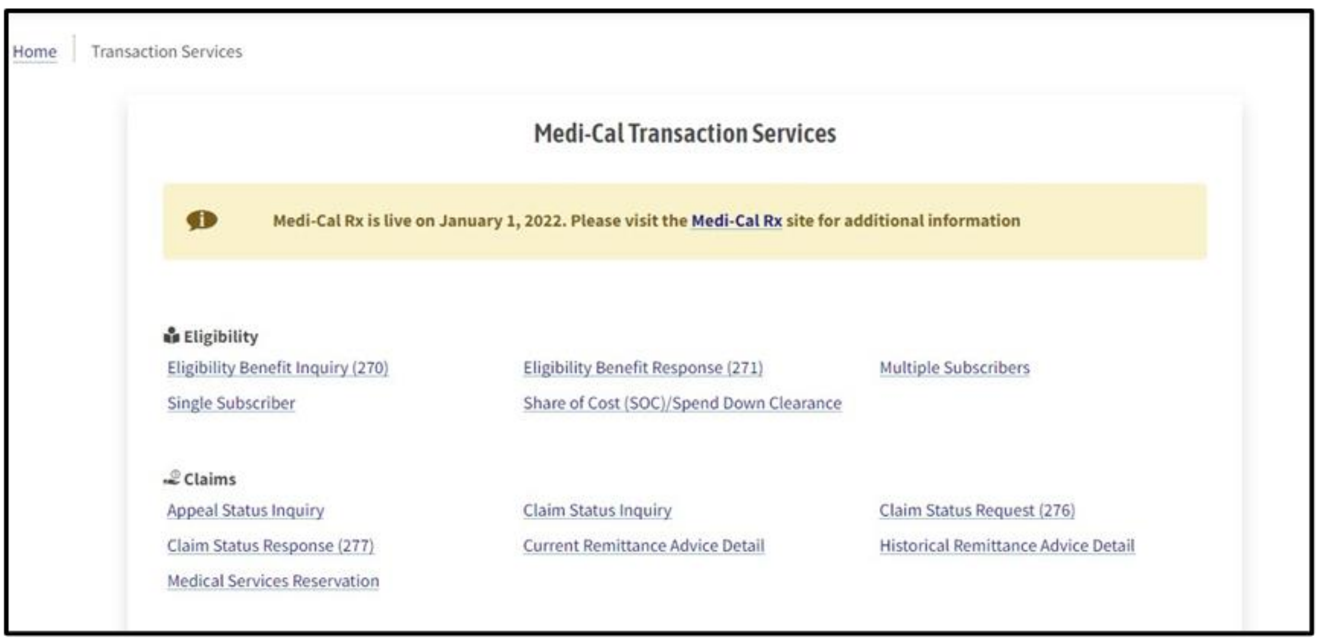


Figure 9.3: Medi-Cal Transaction Services screen.

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.

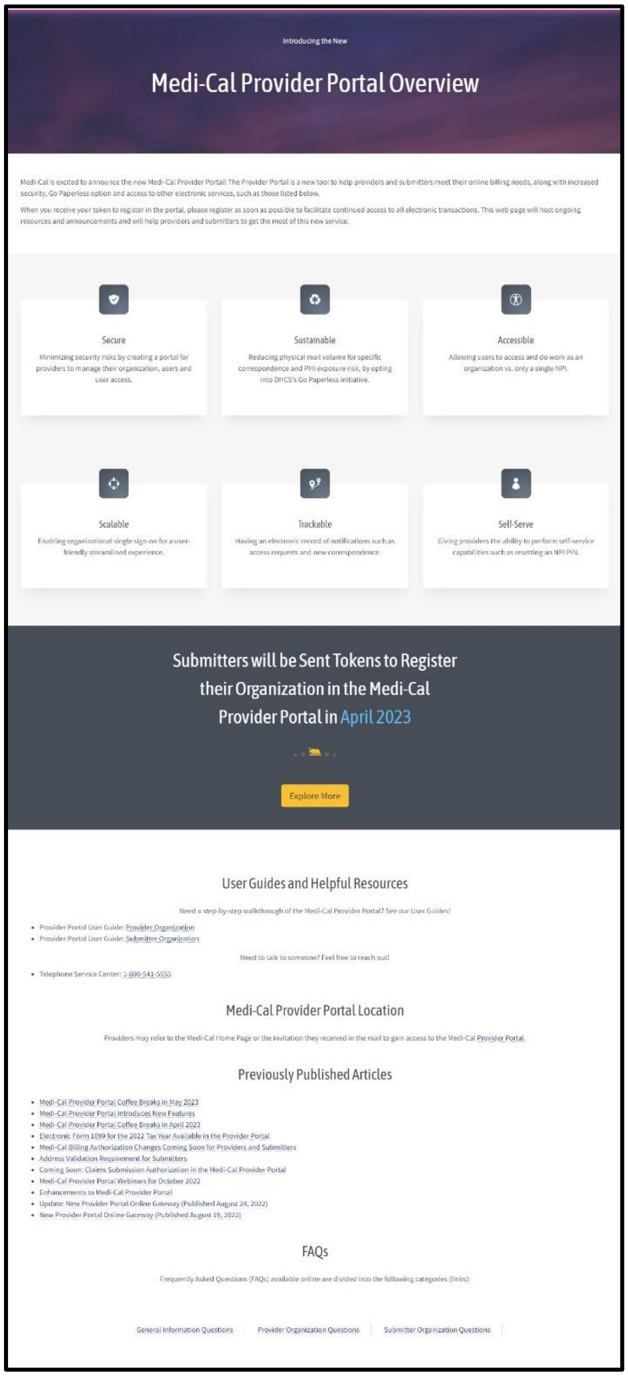


Figure 10.2: The **Medi-Cal Provider Portal Overview** page.

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.

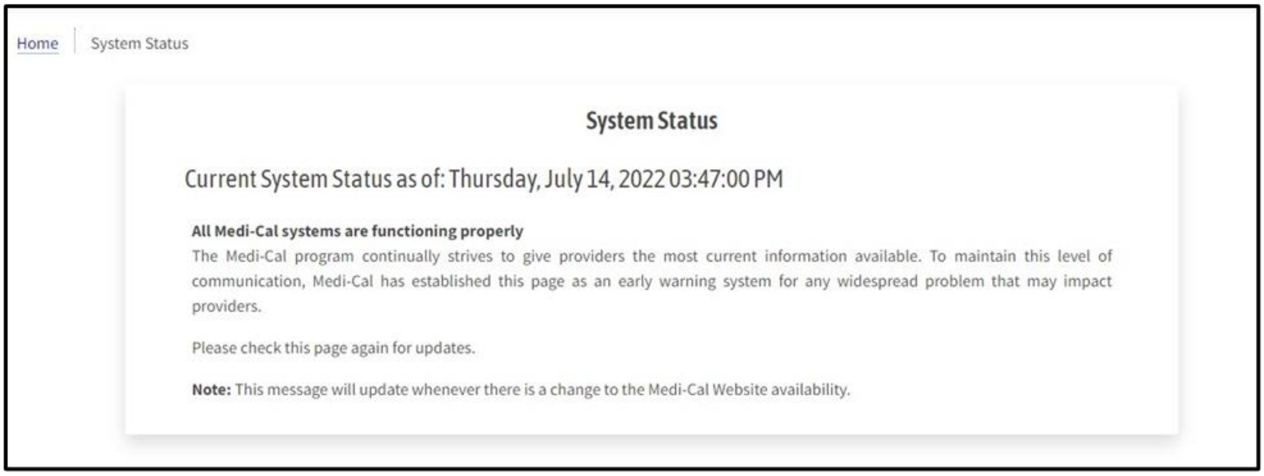


Figure 11.1: System Status page on the Medi-Cal Providers website.

Add a User

Complete the following steps to add a new user:

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

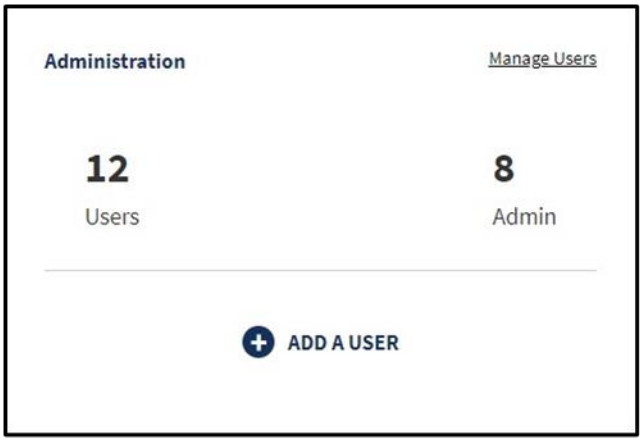


Figure 12.1: Administration tile after selecting **Add a User**.

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

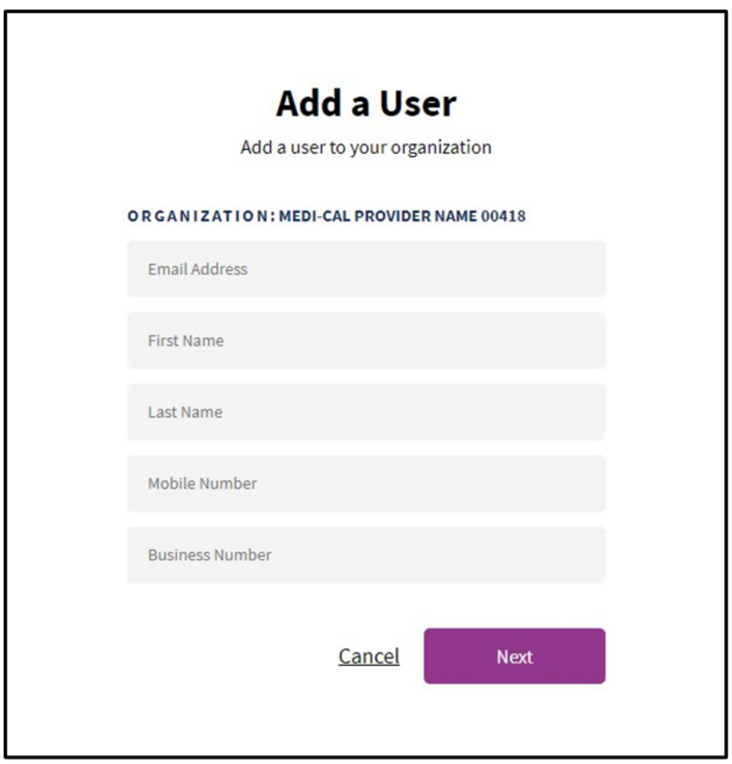


Figure 12.2: Add a User tile.

17. 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**.

Register for the Medi-Cal Provider Portal Inbox x

noreply@cammis.medi-cal.ca.gov

to me

Tue, Mar 22, 4:18 PM

DHCS

MICHELLE BAASS
Director

State of California
Health and Human Services Agency
Department of Health Care Services

GAVIN NEWSOM
Governor

Register for the Medi-Cal Provider Portal

Your account has been activated by your organization administrator. Click on the link to complete your registration.

https://provider-portal-sit.apps.tst.cammis.medi-cal.ca.gov/secureToken/1647-install-9911-observation-2342

If you believe you have received this message in error, please contact the Telephone Service Center or your organization administrator.

Figure 12.3: Email from DHCS containing a registration link.

18. 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**.

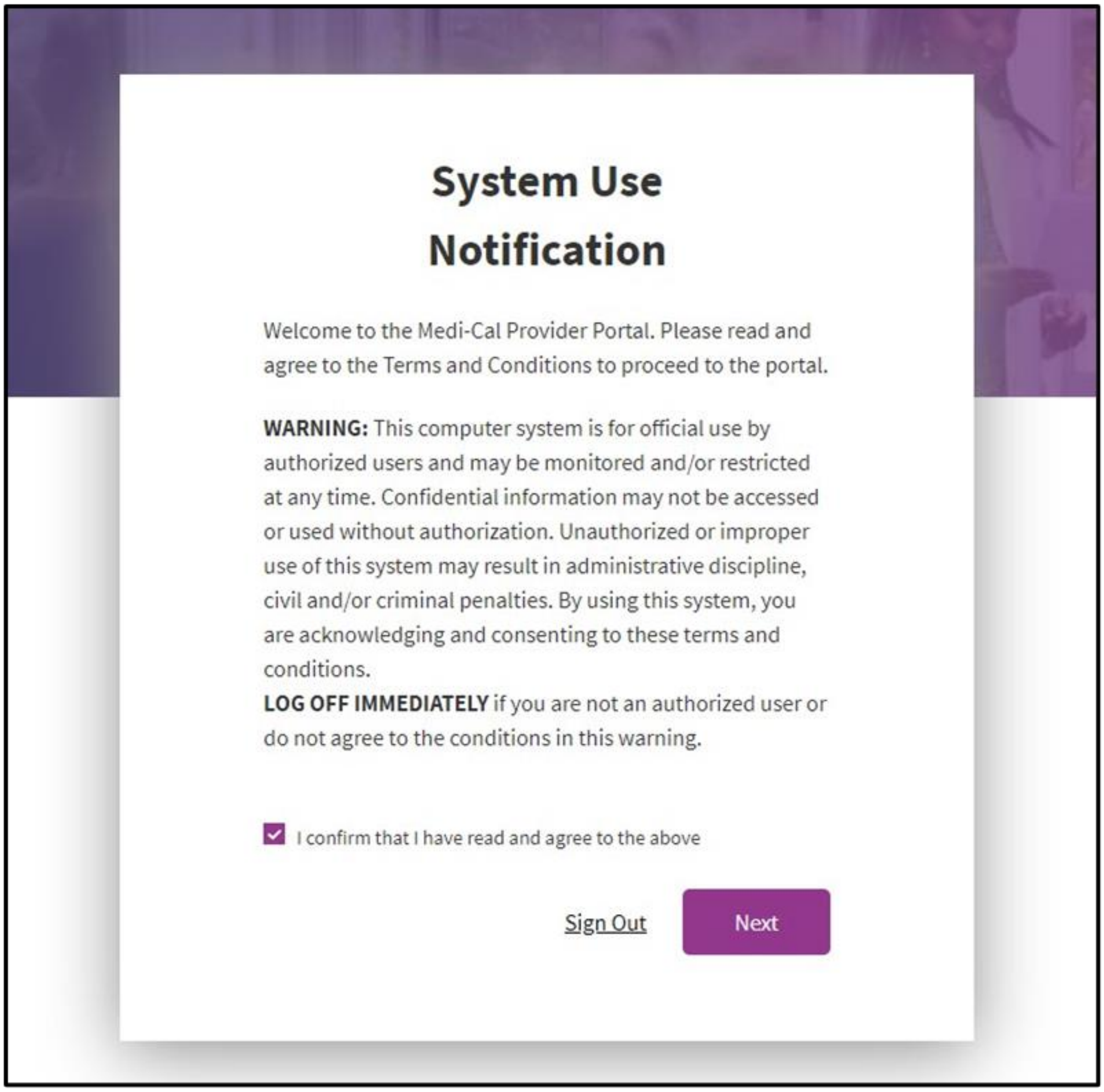


Figure 12.4: The System User Notification window.

19. 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**.

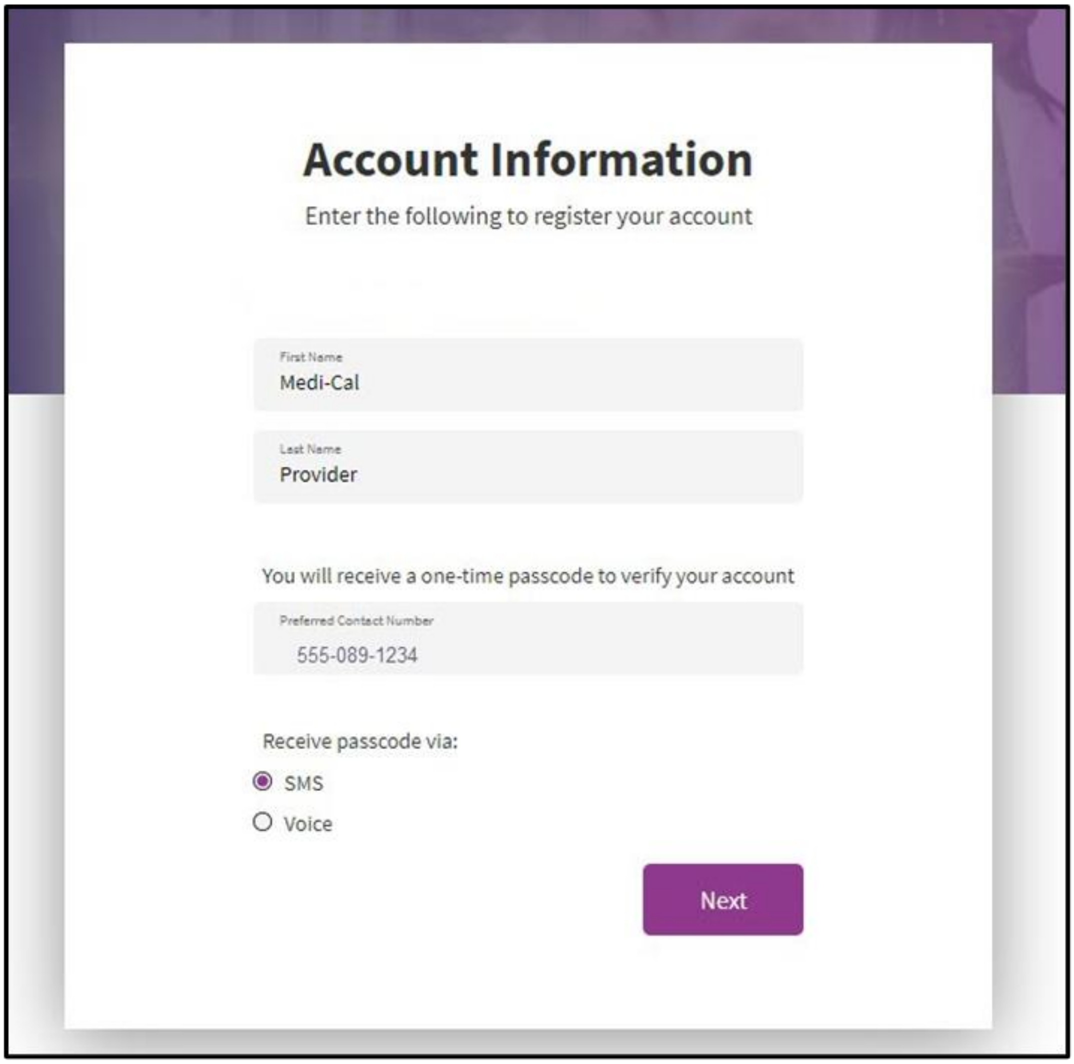


Figure 12.5: The Account Information screen.

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

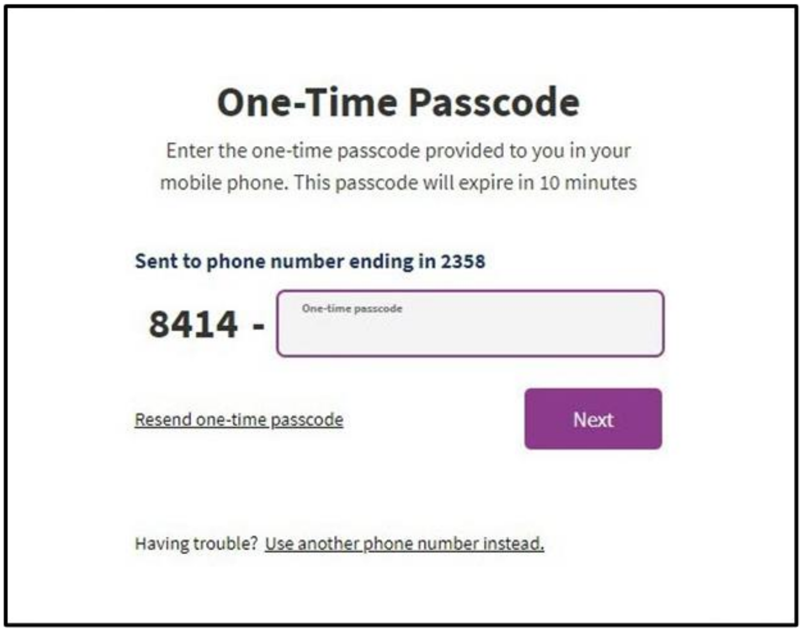


Figure 12.6: OTP page.

21. A Registration Complete window will appear.

Figure 12.7: Registration Complete window.

22. 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.

23. 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.

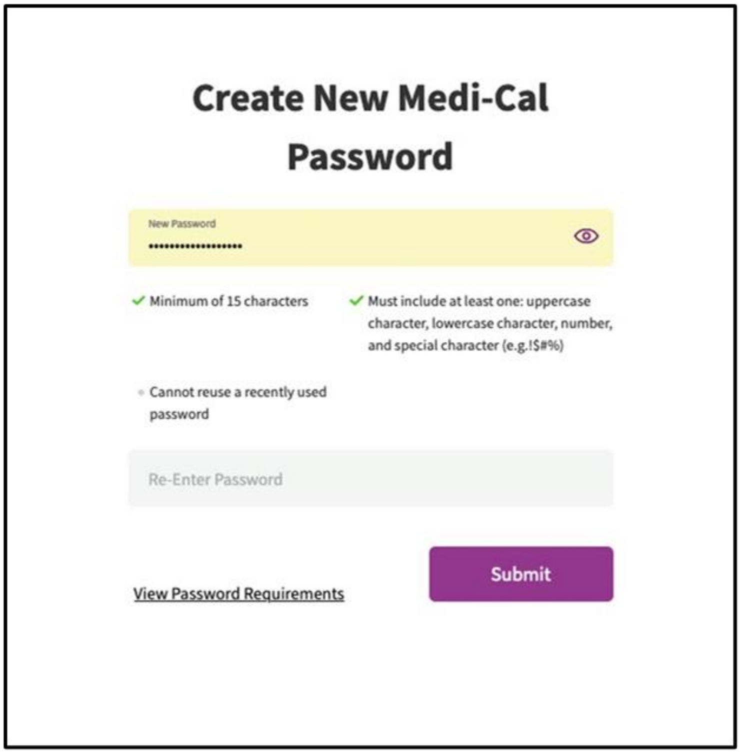


Figure 12.9: Create a New Medi-Cal Password page.

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

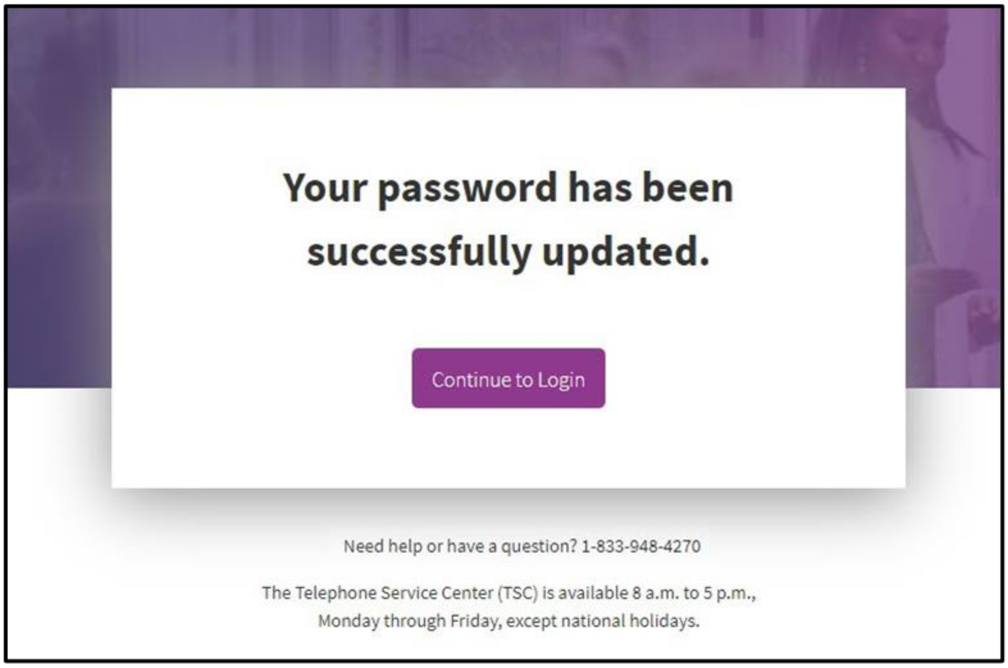


Figure 12.10: The Password has been successfully updated window.

25. 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.

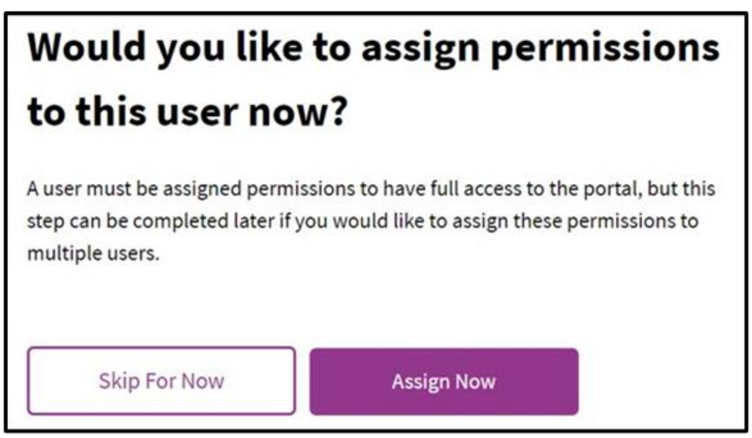


Figure 12.11: Select the **Assign Now** option to begin selecting permissions.

26. 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.

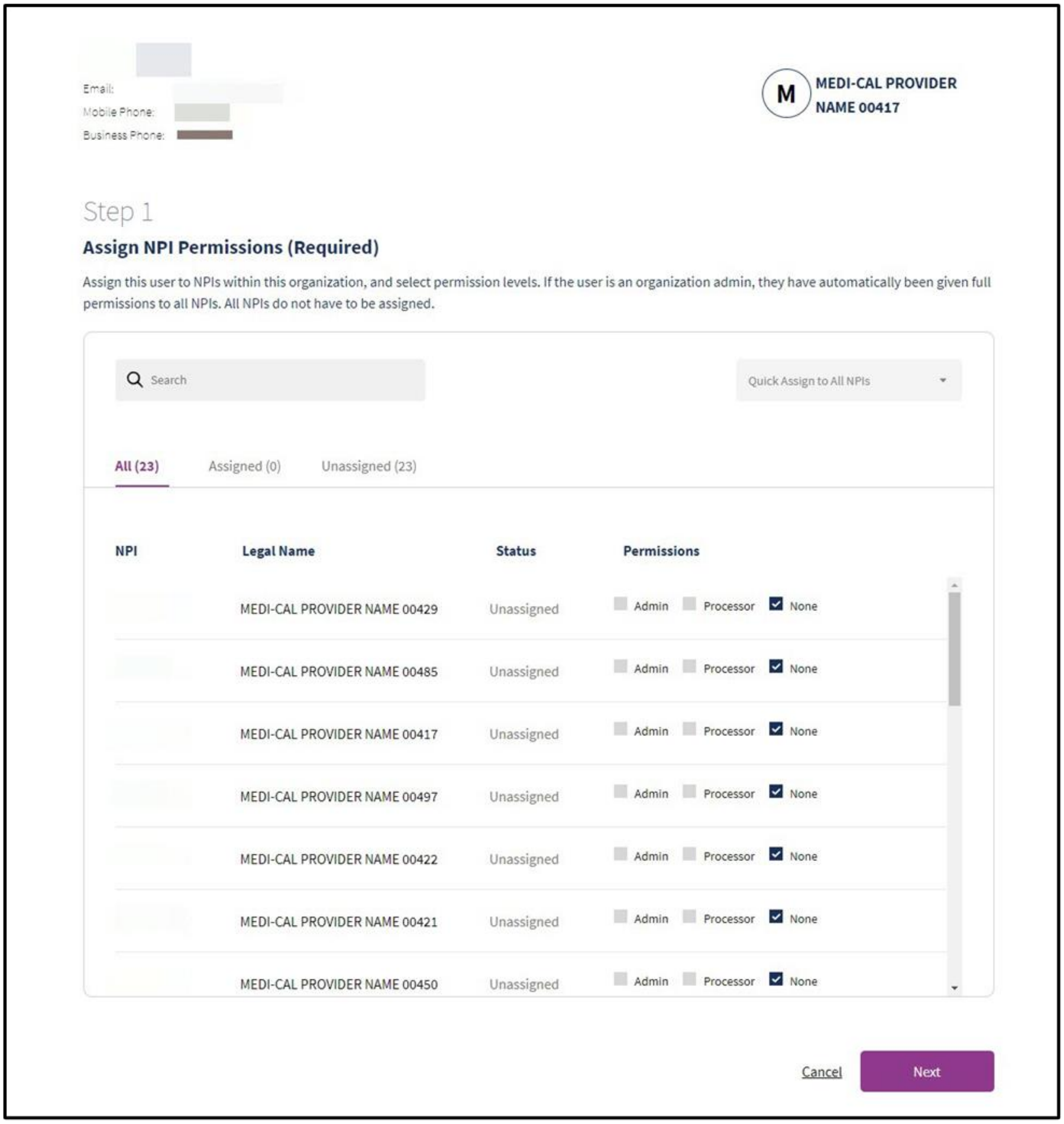


Figure 12.12: Step 1: Assign NPI Permissions screen.

27. 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.

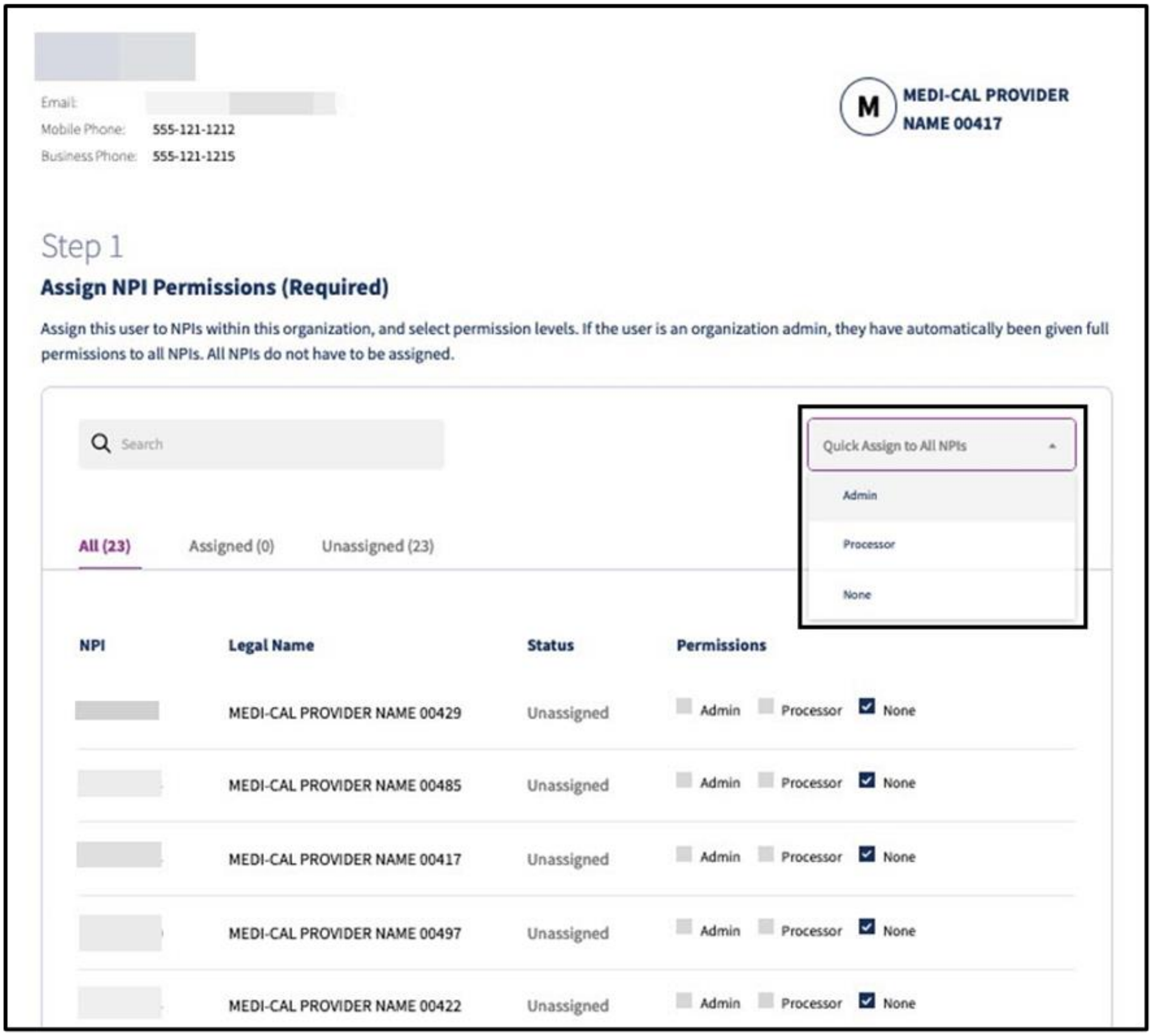


Figure 12.13: The Quick Assign to All NPIs option on Step 1.

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

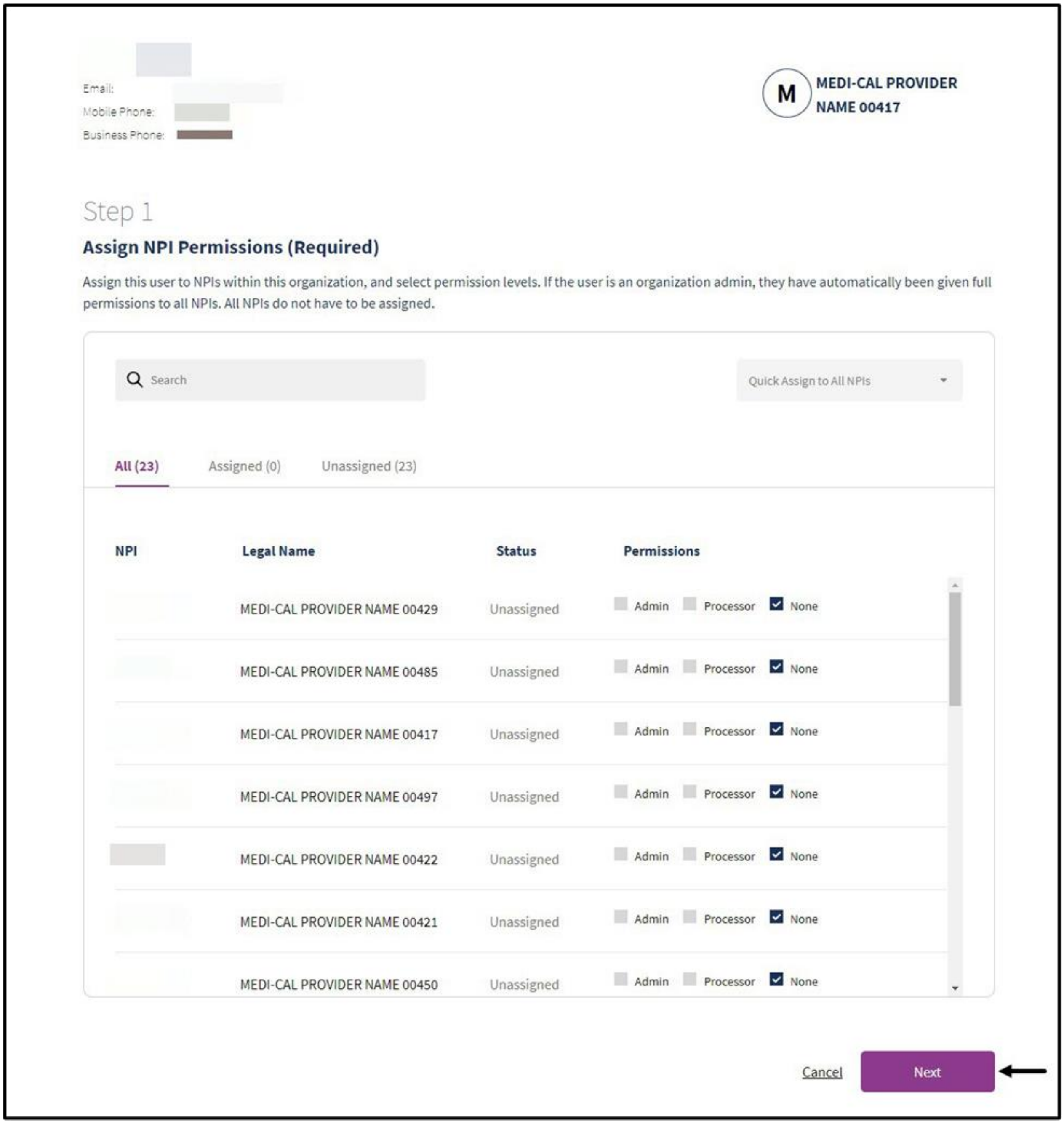


Figure 12.14: Select Next on the Assign NPI Permissions screen.

29. 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.

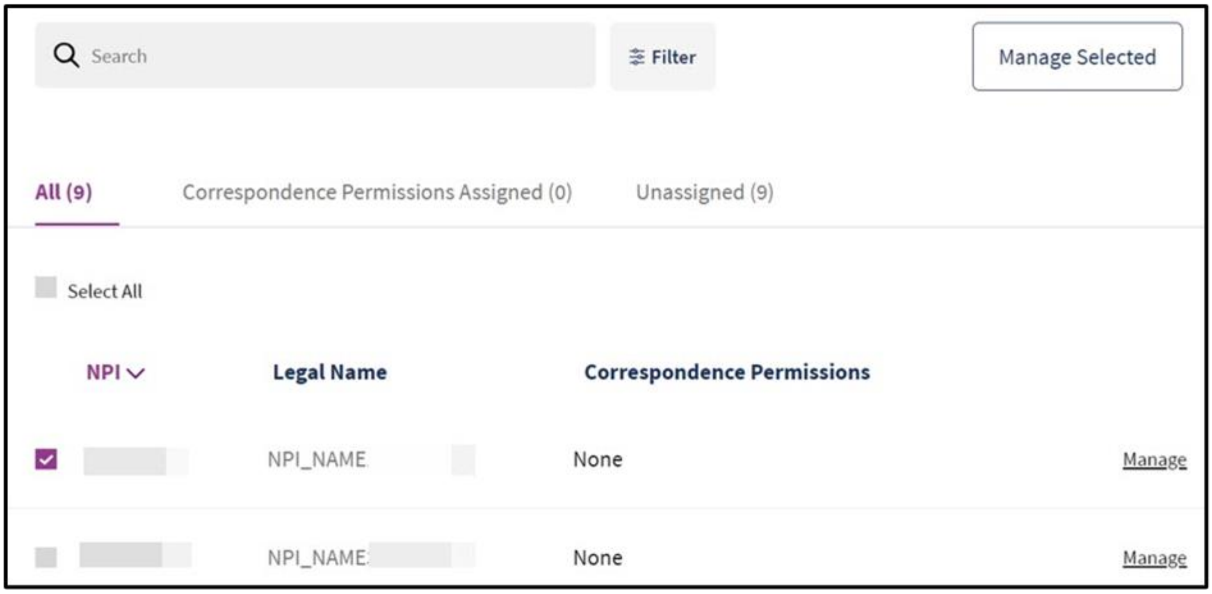


Figure 12.15: Step 2: Assign Correspondence Permissions.

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

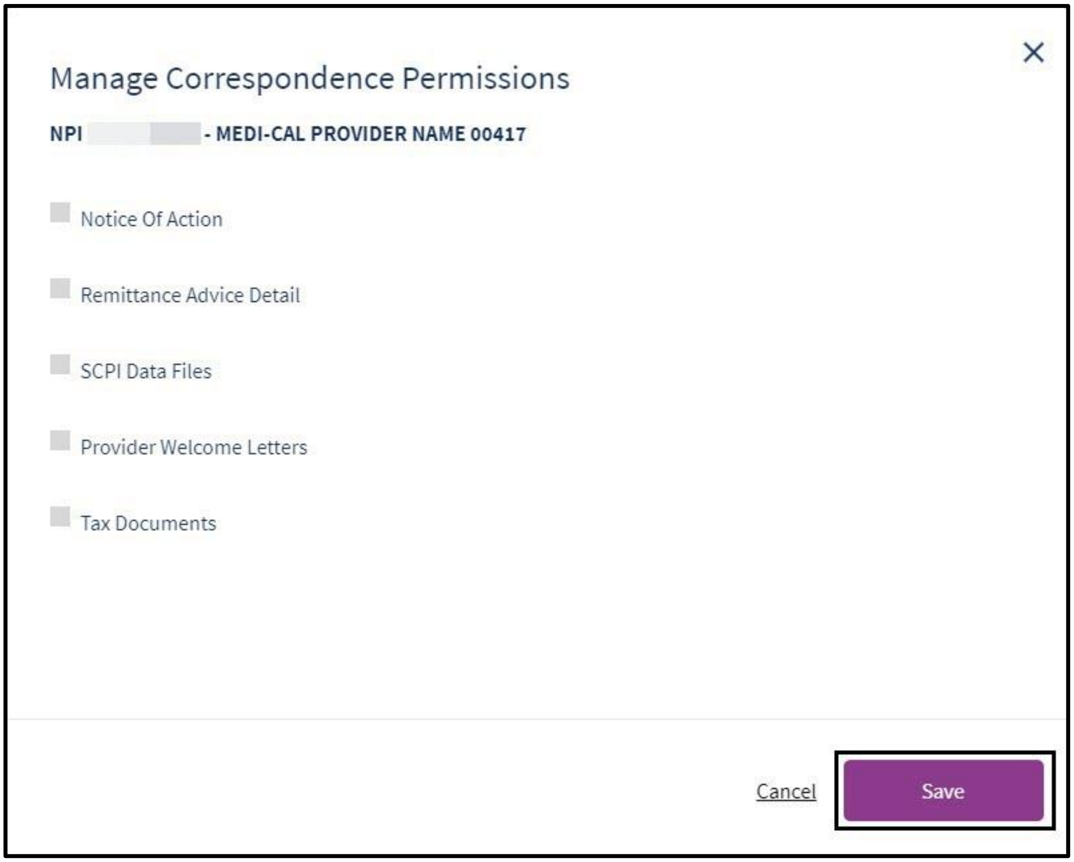


Figure 12.16: Select **Save** on the Manage Correspondence Permission window.

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

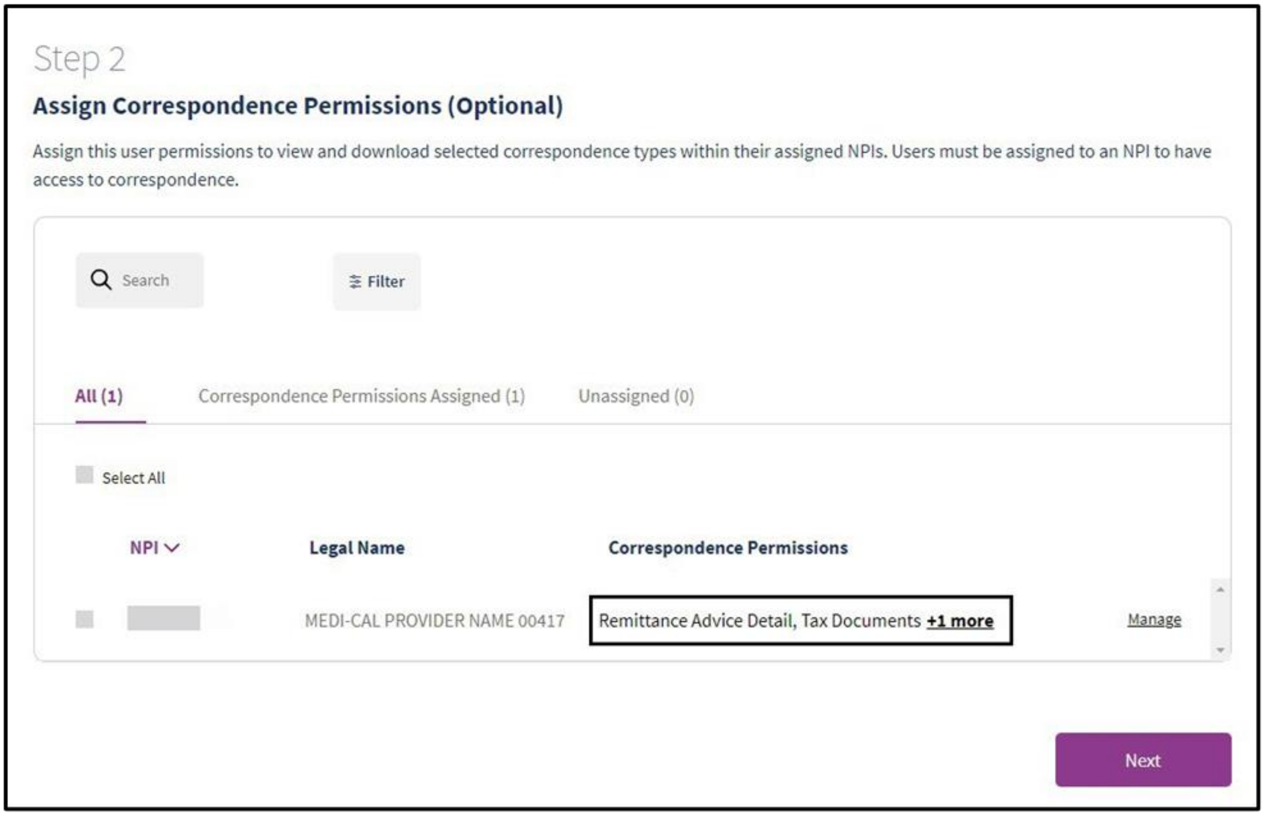


Figure 12.17: The Remittance Advice Detail, Tax Documents link on the Assign Correspondence Permission screen.

32. 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.**

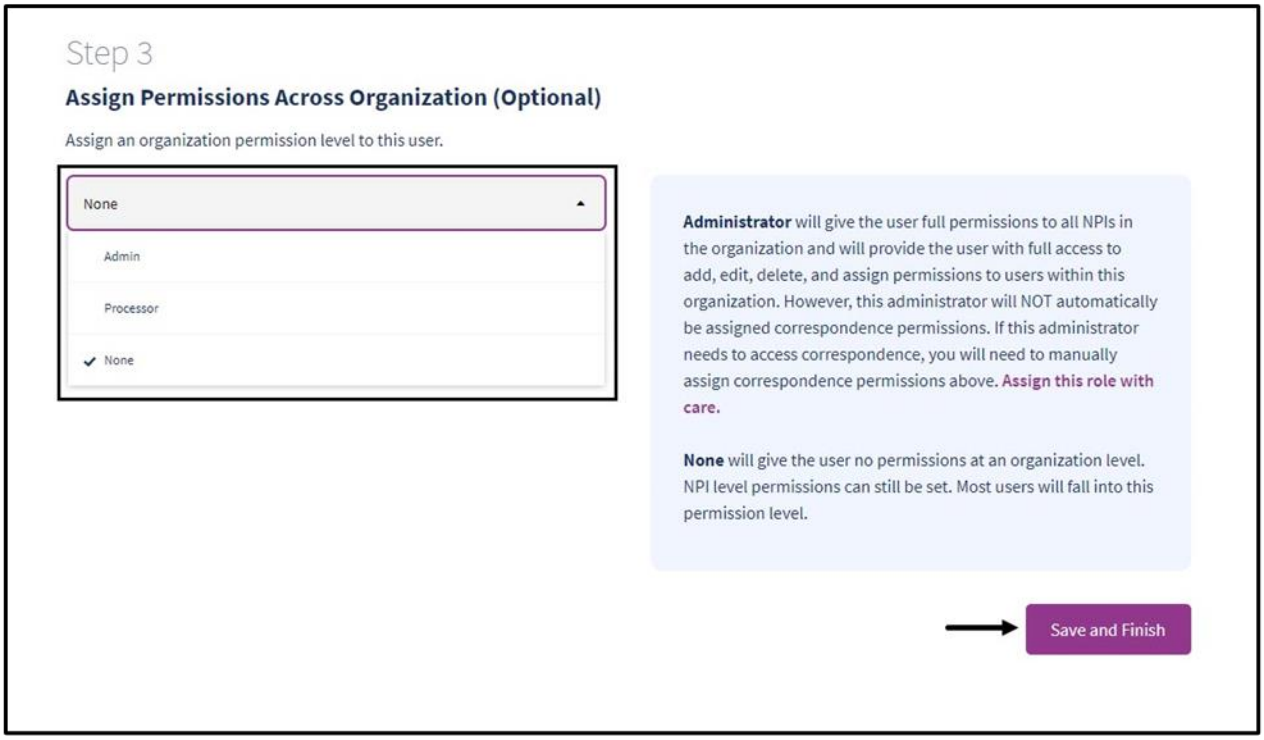


Figure 12.18: Step 3: Assign Permissions Across Organization, select **Save and Finish.**

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

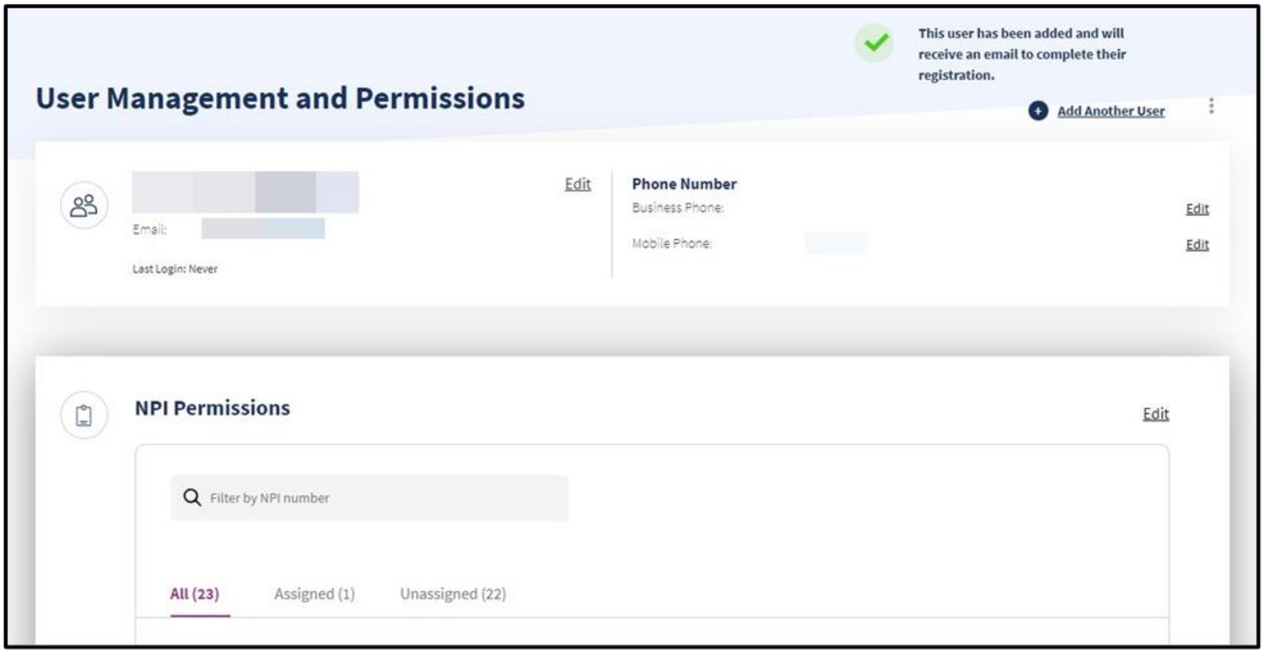


Figure 12.19: The confirmation page containing the new user's information as entered.

Add a new Organization

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

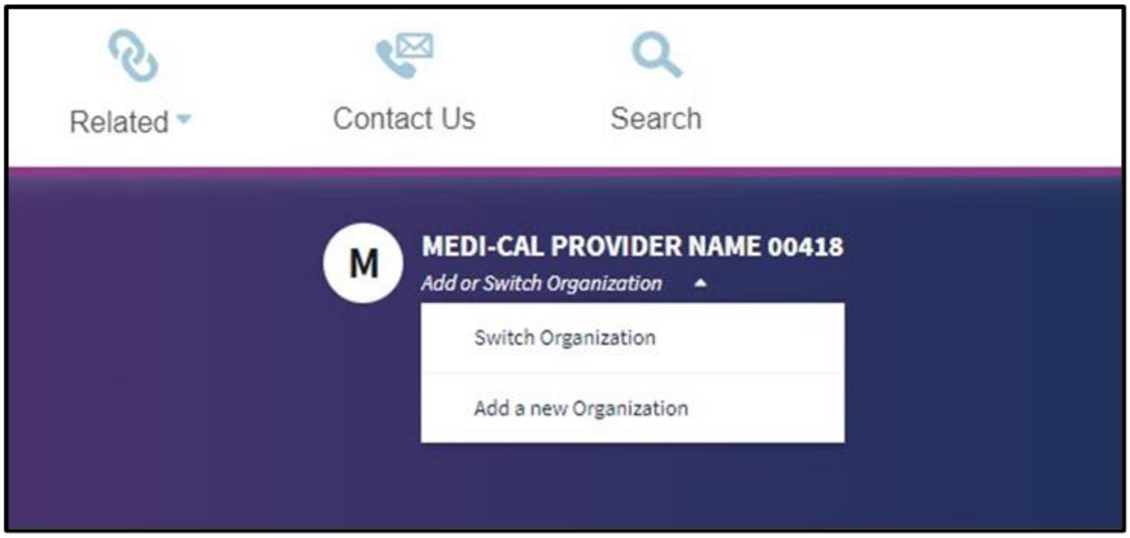


Figure 13.1: The Switch Organization or Add a New Organization options under the drop-down menu.

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

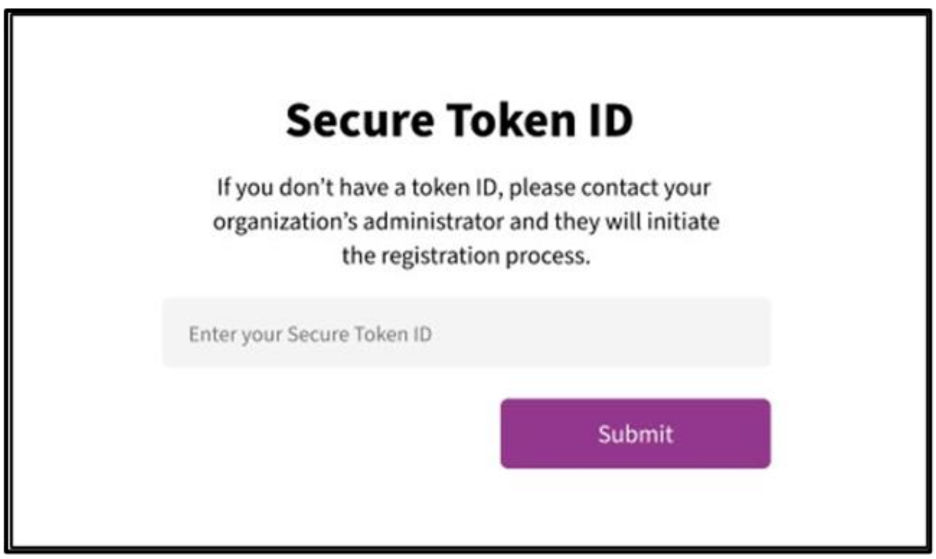


Figure 13.2: Secure Token ID input area.

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

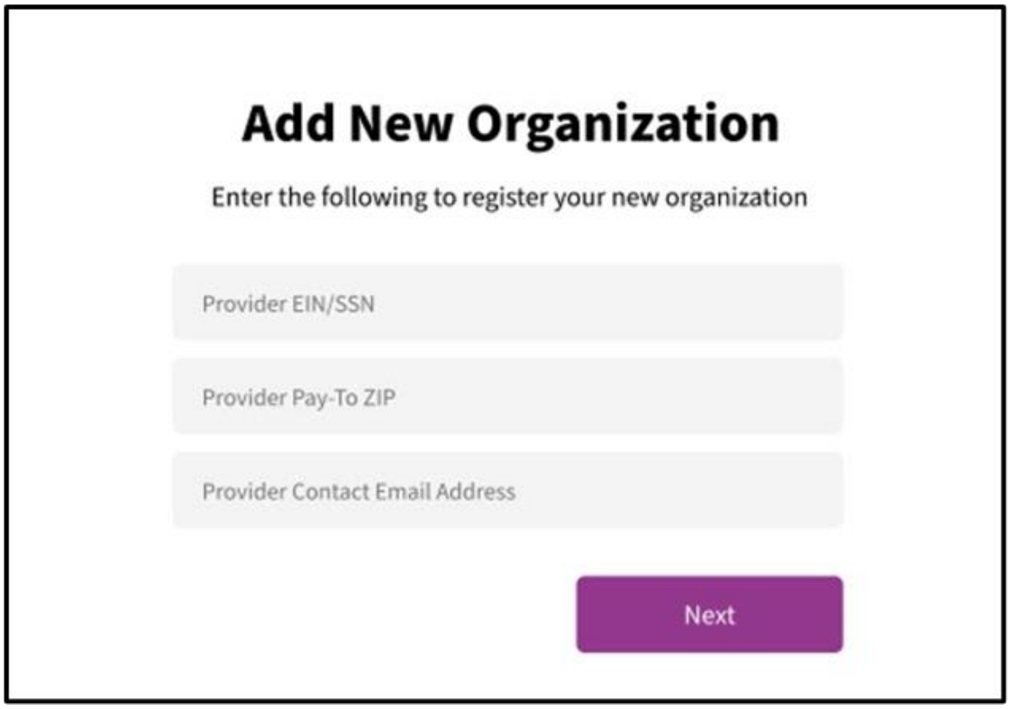


Figure 13.3: The Add New Organization window with Provider EIN/SSN, Provider Pay-To-ZIP and Provider Contact Email Address input area.

37. 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.

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.

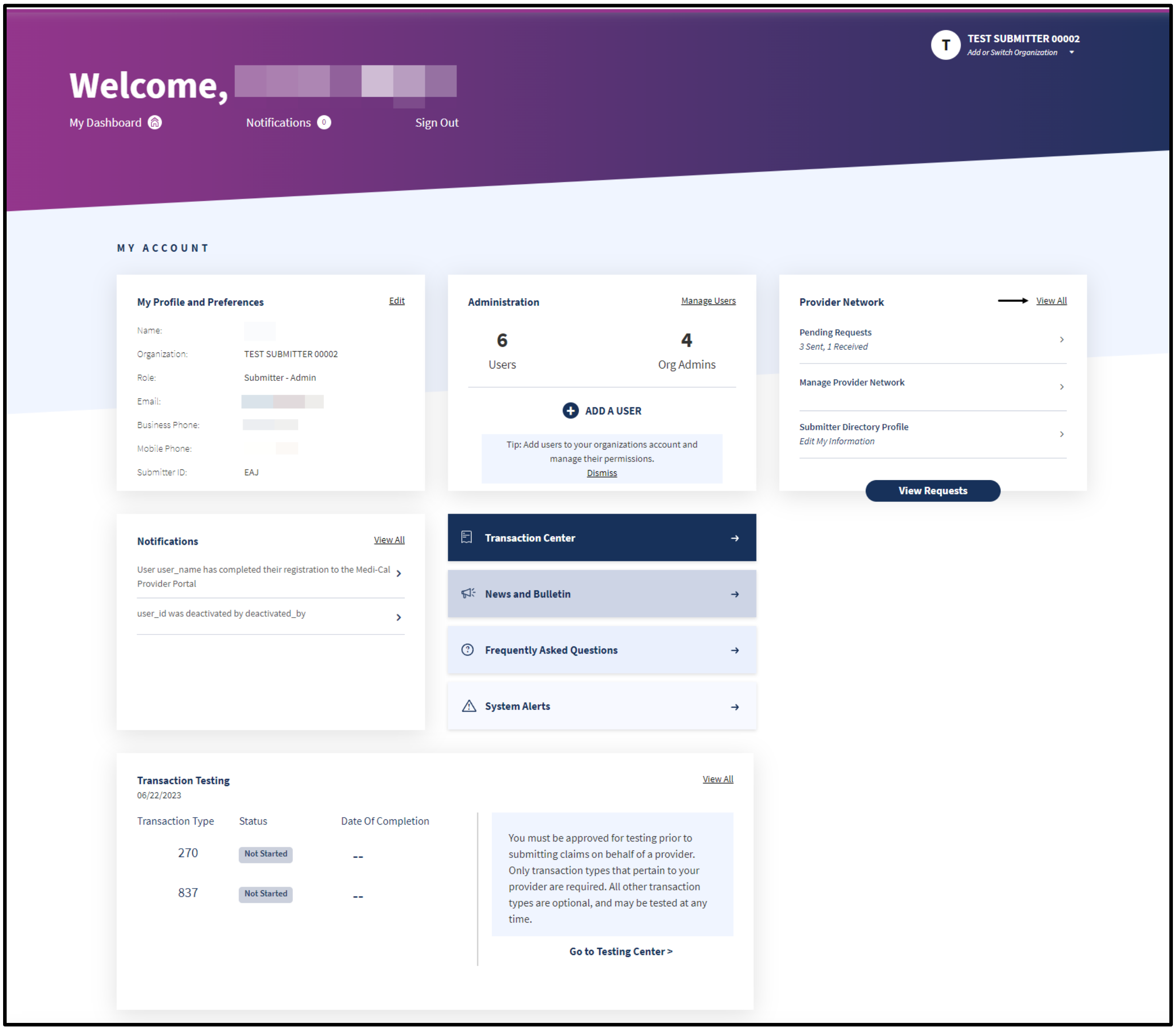


Figure 14.1: Provider Portal homepage.

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

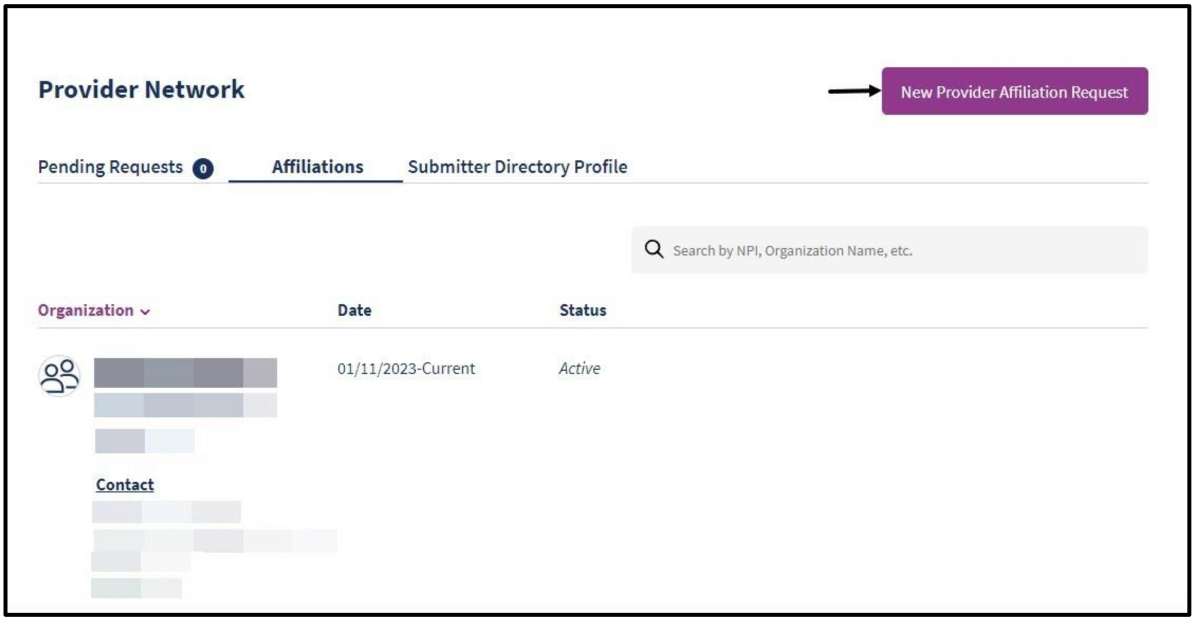


Figure 14.2: New Provider Affiliation Request.

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

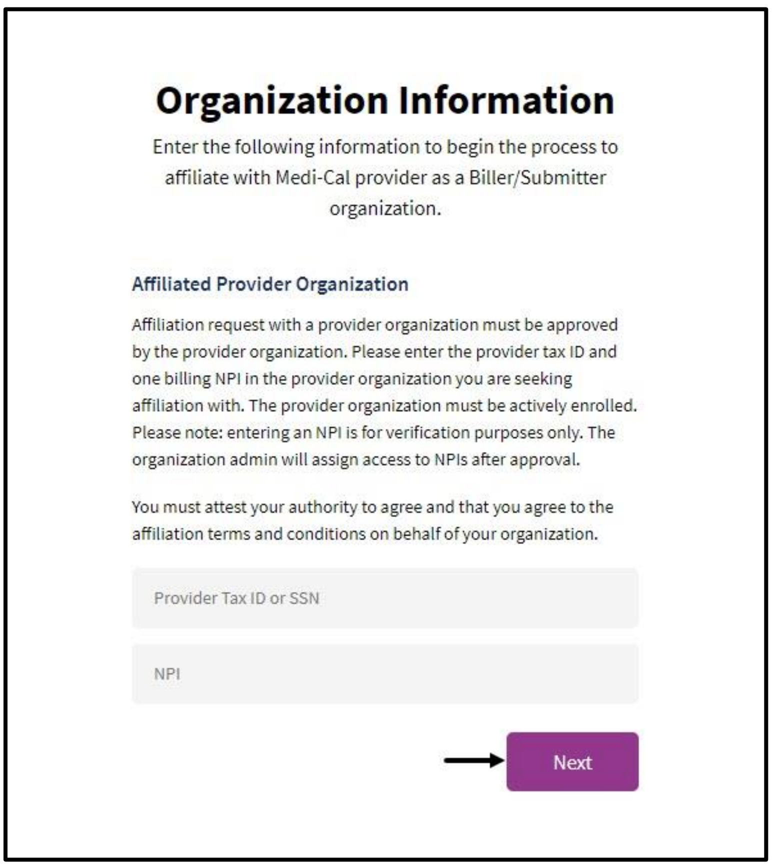
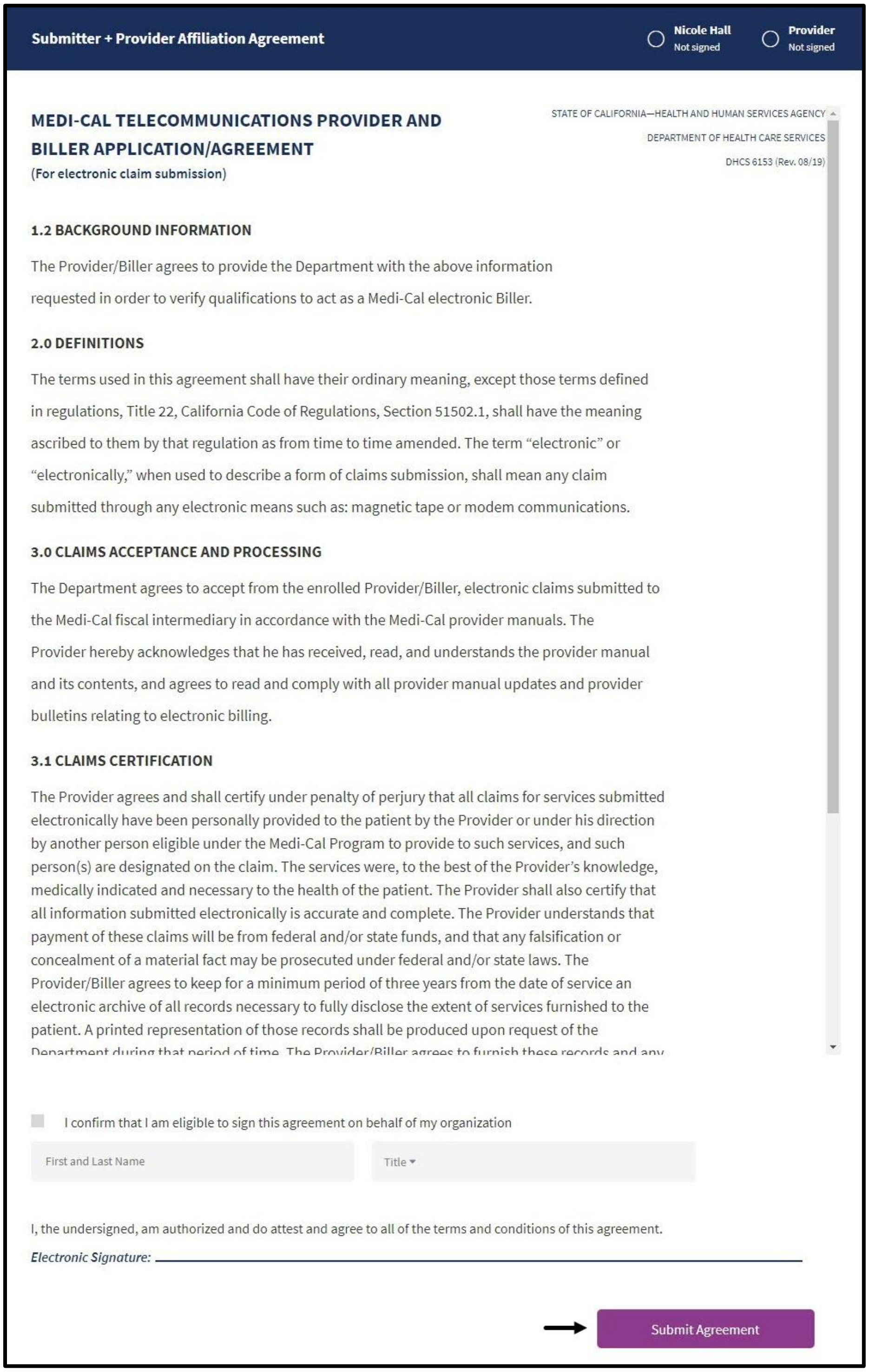


Figure 14.3: Organization Information form.

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**.



Submitter + Provider Affiliation Agreement

Nicole Hall Not signed

Provider Not signed

STATE OF CALIFORNIA—HEALTH AND HUMAN SERVICES AGENCY
DEPARTMENT OF HEALTH CARE SERVICES
DHCS 6153 (Rev. 08/19)

MEDI-CAL TELECOMMUNICATIONS PROVIDER AND BILLER APPLICATION/AGREEMENT
(For electronic claim submission)

1.2 BACKGROUND INFORMATION

The Provider/Biller agrees to provide the Department with the above information requested in order to verify qualifications to act as a Medi-Cal electronic Biller.

2.0 DEFINITIONS

The terms used in this agreement shall have their ordinary meaning, except those terms defined in regulations, Title 22, California Code of Regulations, Section 51502.1, shall have the meaning ascribed to them by that regulation as from time to time amended. The term "electronic" or "electronically," when used to describe a form of claims submission, shall mean any claim submitted through any electronic means such as: magnetic tape or modem communications.

3.0 CLAIMS ACCEPTANCE AND PROCESSING

The Department agrees to accept from the enrolled Provider/Biller, electronic claims submitted to the Medi-Cal fiscal intermediary in accordance with the Medi-Cal provider manuals. The Provider hereby acknowledges that he has received, read, and understands the provider manual and its contents, and agrees to read and comply with all provider manual updates and provider bulletins relating to electronic billing.

3.1 CLAIMS CERTIFICATION

The Provider agrees and shall certify under penalty of perjury that all claims for services submitted electronically have been personally provided to the patient by the Provider or under his direction by another person eligible under the Medi-Cal Program to provide to such services, and such person(s) are designated on the claim. The services were, to the best of the Provider's knowledge, medically indicated and necessary to the health of the patient. The Provider shall also certify that all information submitted electronically is accurate and complete. The Provider understands that payment of these claims will be from federal and/or state funds, and that any falsification or concealment of a material fact may be prosecuted under federal and/or state laws. The Provider/Biller agrees to keep for a minimum period of three years from the date of service an electronic archive of all records necessary to fully disclose the extent of services furnished to the patient. A printed representation of those records shall be produced upon request of the Department during that period of time. The Provider/Biller agrees to furnish these records and any

I confirm that I am eligible to sign this agreement on behalf of my organization

First and Last Name

Title

I, the undersigned, am authorized and do attest and agree to all of the terms and conditions of this agreement.

Electronic Signature:

Submit Agreement

Figure 14.4: Submitter and Provider Affiliation Agreement.

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

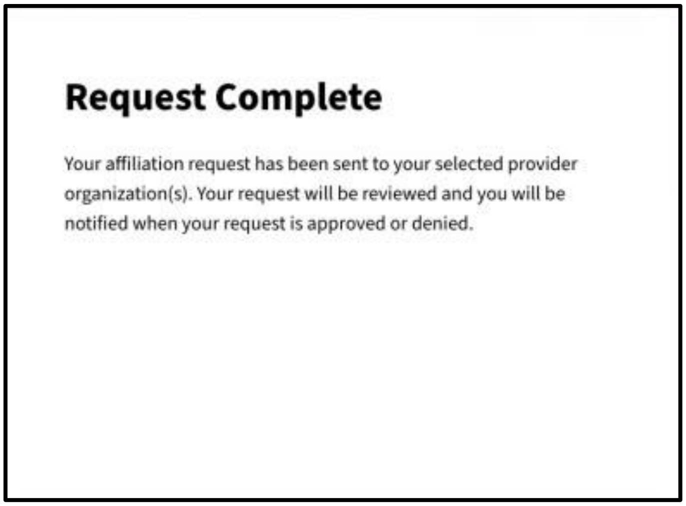


Figure 14.5: Request Complete pop-up window.

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

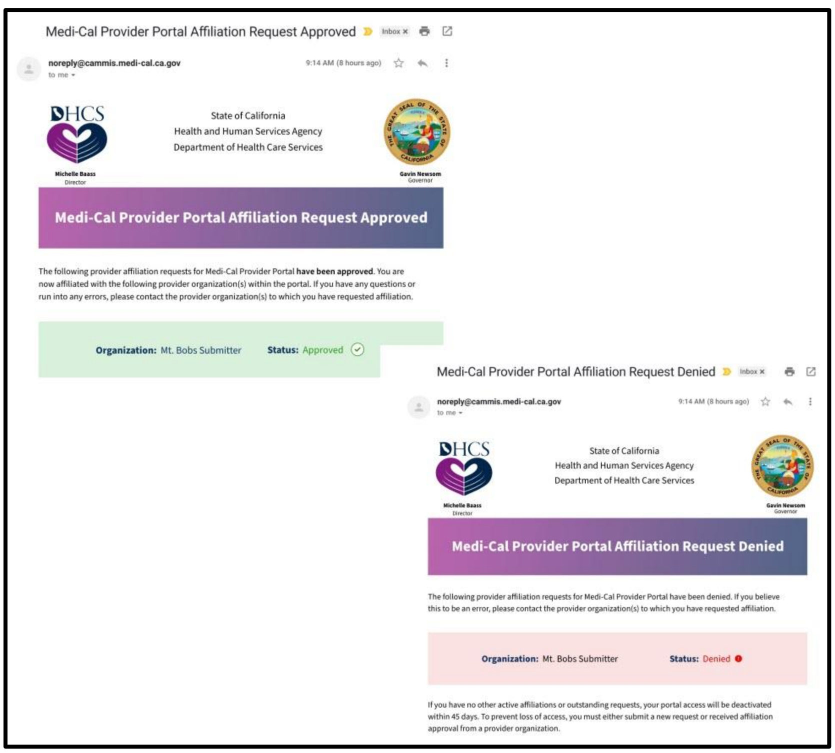


Figure 14.6: Provider Portal affiliation request status email.

40. 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.

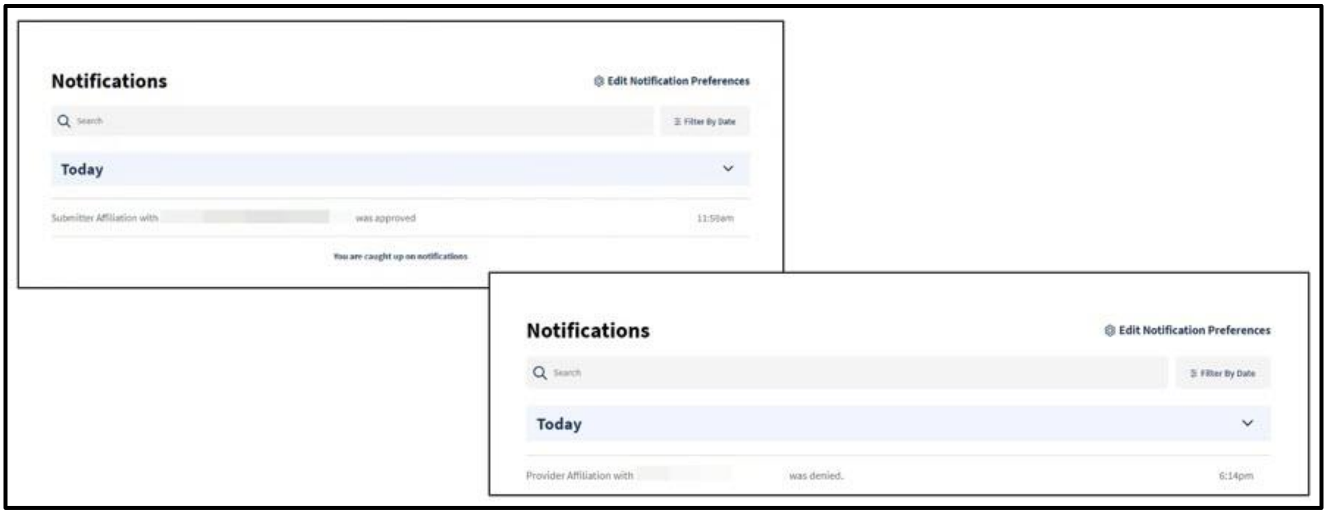


Figure 14.7: Provider Portal affiliation request notification.

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.

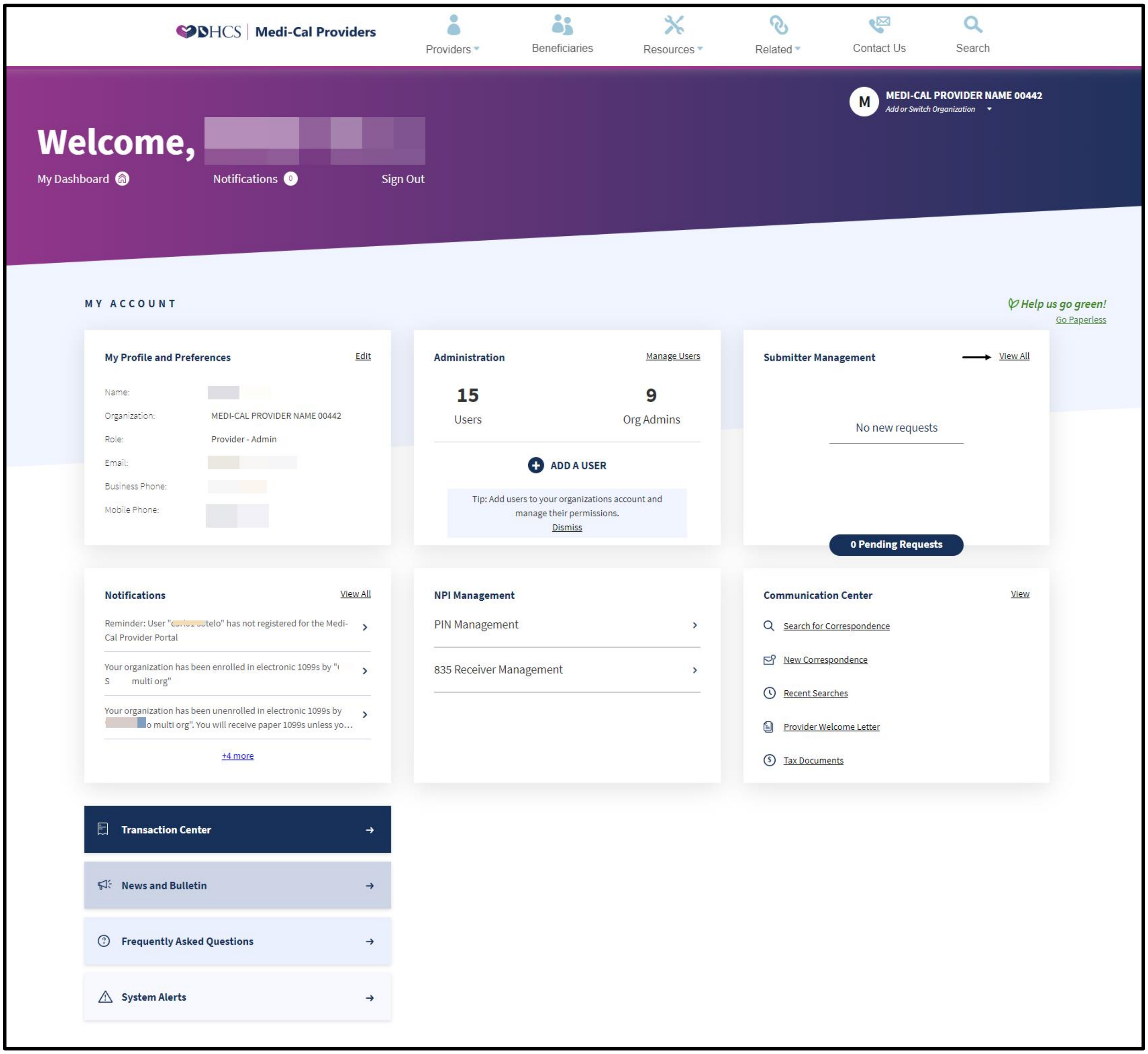


Figure 15.1: Provider Portal homepage.

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

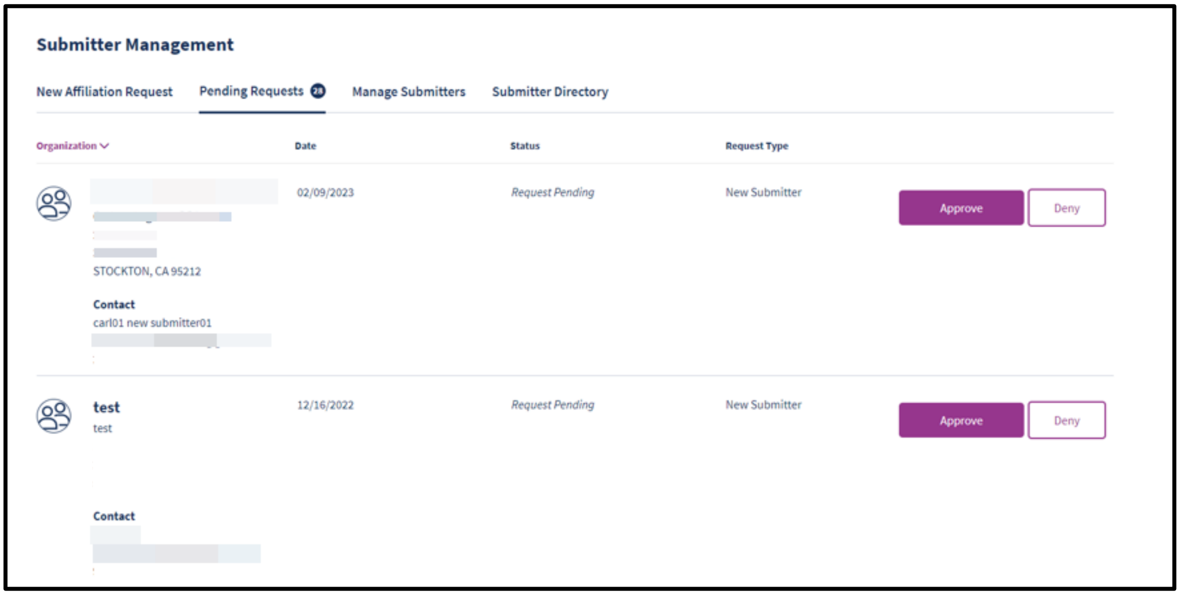
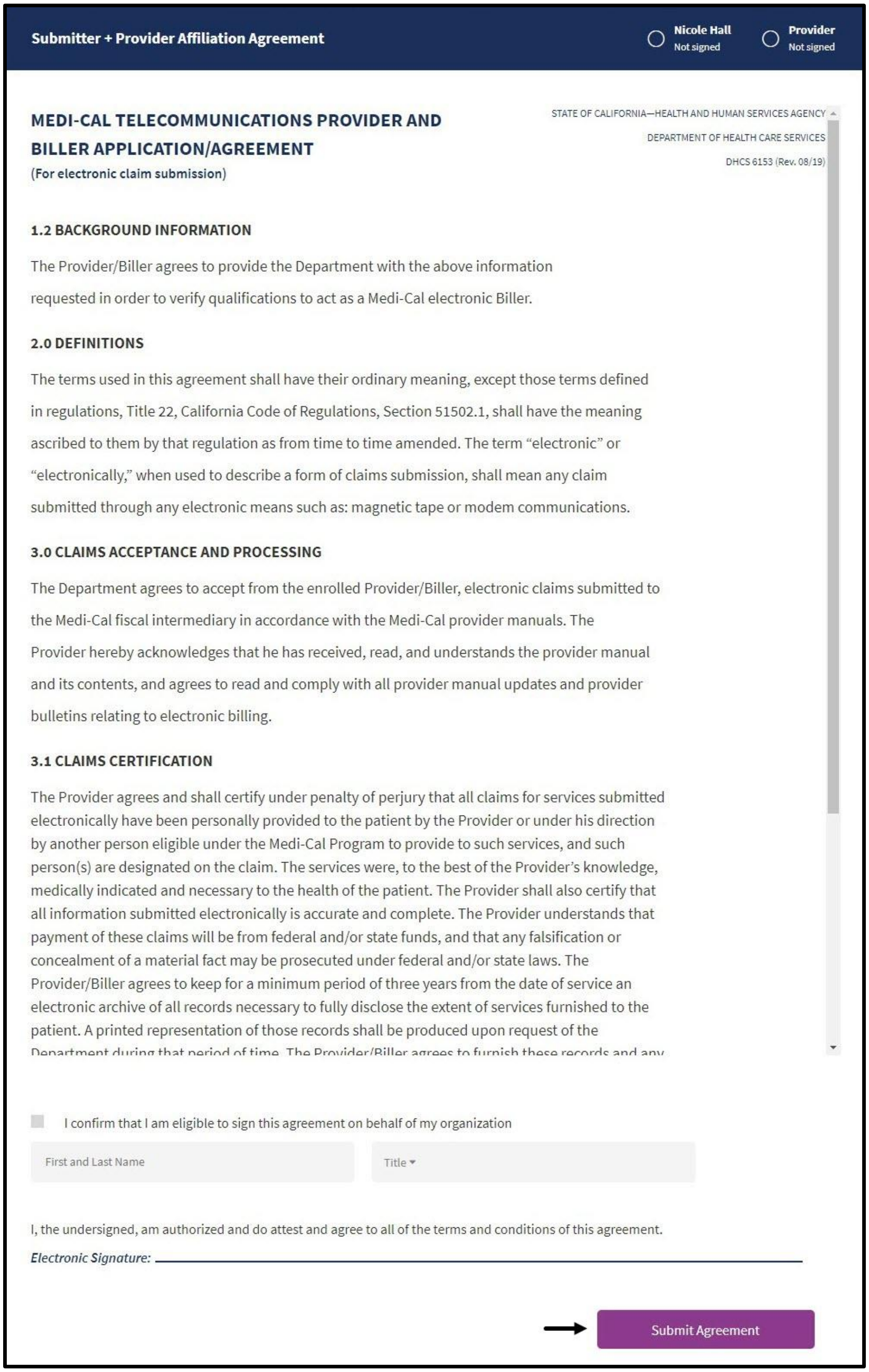


Figure 15.2: Pending affiliation requests.

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**.



Submitter + Provider Affiliation Agreement

Nicole Hall
Not signed

Provider
Not signed

STATE OF CALIFORNIA—HEALTH AND HUMAN SERVICES AGENCY

DEPARTMENT OF HEALTH CARE SERVICES

DHCS 6153 (Rev. 08/19)

MEDI-CAL TELECOMMUNICATIONS PROVIDER AND BILLER APPLICATION/AGREEMENT

(For electronic claim submission)

1.2 BACKGROUND INFORMATION

The Provider/Biller agrees to provide the Department with the above information requested in order to verify qualifications to act as a Medi-Cal electronic Biller.

2.0 DEFINITIONS

The terms used in this agreement shall have their ordinary meaning, except those terms defined in regulations, Title 22, California Code of Regulations, Section 51502.1, shall have the meaning ascribed to them by that regulation as from time to time amended. The term “electronic” or “electronically,” when used to describe a form of claims submission, shall mean any claim submitted through any electronic means such as: magnetic tape or modem communications.

3.0 CLAIMS ACCEPTANCE AND PROCESSING

The Department agrees to accept from the enrolled Provider/Biller, electronic claims submitted to the Medi-Cal fiscal intermediary in accordance with the Medi-Cal provider manuals. The Provider hereby acknowledges that he has received, read, and understands the provider manual and its contents, and agrees to read and comply with all provider manual updates and provider bulletins relating to electronic billing.

3.1 CLAIMS CERTIFICATION

The Provider agrees and shall certify under penalty of perjury that all claims for services submitted electronically have been personally provided to the patient by the Provider or under his direction by another person eligible under the Medi-Cal Program to provide to such services, and such person(s) are designated on the claim. The services were, to the best of the Provider’s knowledge, medically indicated and necessary to the health of the patient. The Provider shall also certify that all information submitted electronically is accurate and complete. The Provider understands that payment of these claims will be from federal and/or state funds, and that any falsification or concealment of a material fact may be prosecuted under federal and/or state laws. The Provider/Biller agrees to keep for a minimum period of three years from the date of service an electronic archive of all records necessary to fully disclose the extent of services furnished to the patient. A printed representation of those records shall be produced upon request of the Department during that period of time. The Provider/Biller agrees to furnish these records and any

I confirm that I am eligible to sign this agreement on behalf of my organization

First and Last Name

Title

I, the undersigned, am authorized and do attest and agree to all of the terms and conditions of this agreement.

Electronic Signature:

Submit Agreement

Figure 15.3: Submitter and Provider Affiliation Agreement.

4. Affiliation requests may also be denied.

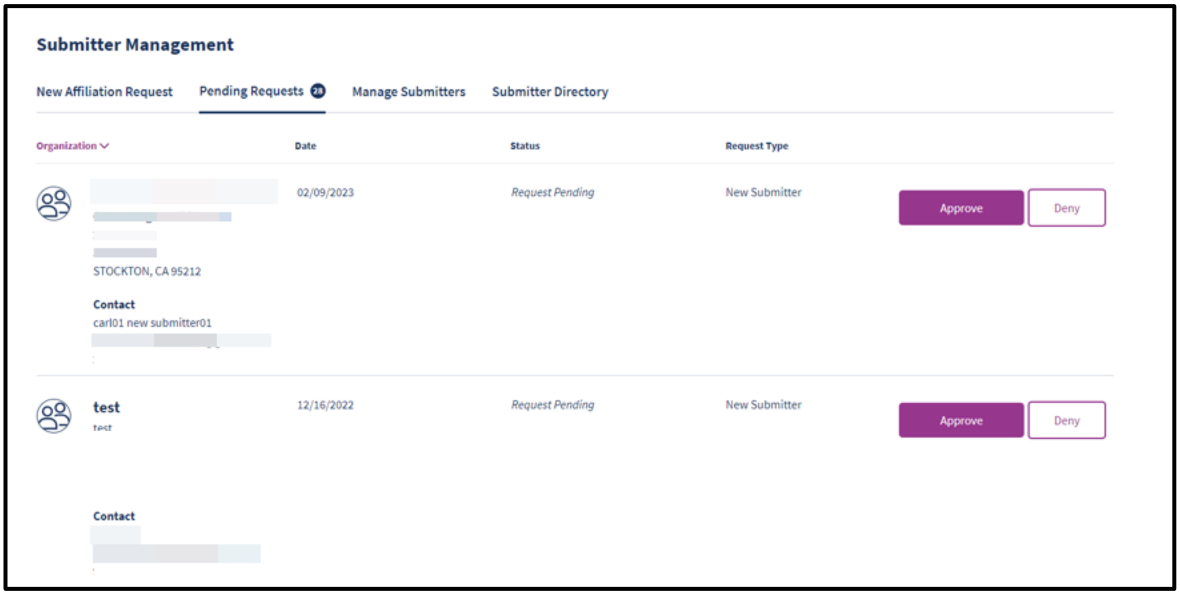


Figure 15.4: Deny affiliation request.

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

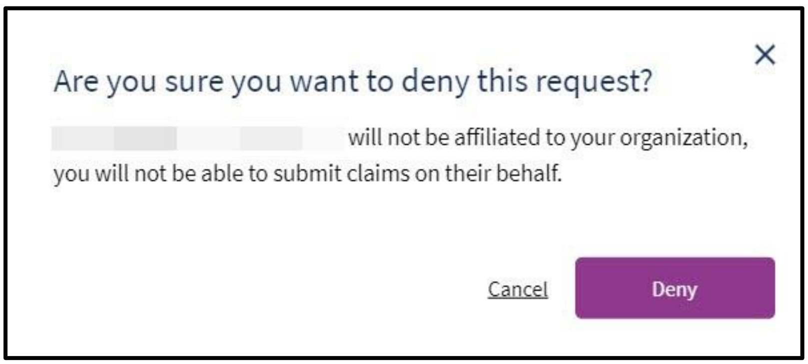


Figure 15.5: Confirmation prompt to deny request.

Submitter Directory

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

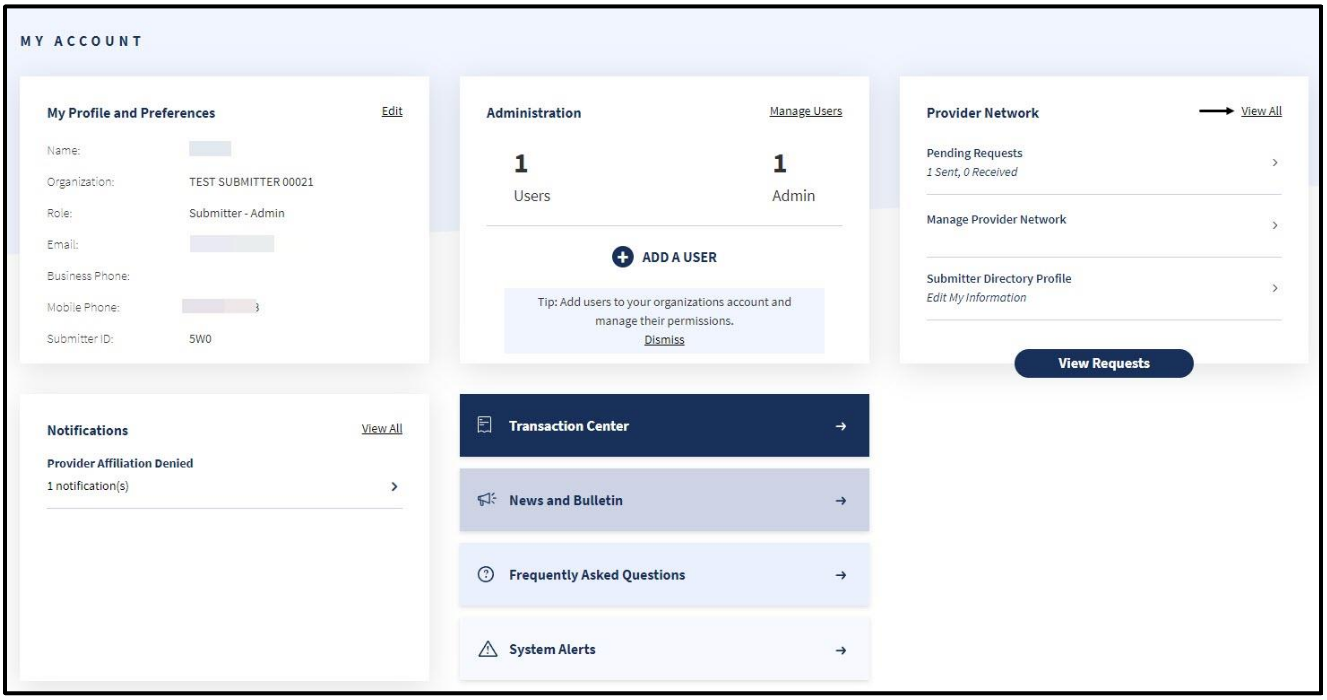


Figure 15.6: Provider Portal homepage

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.

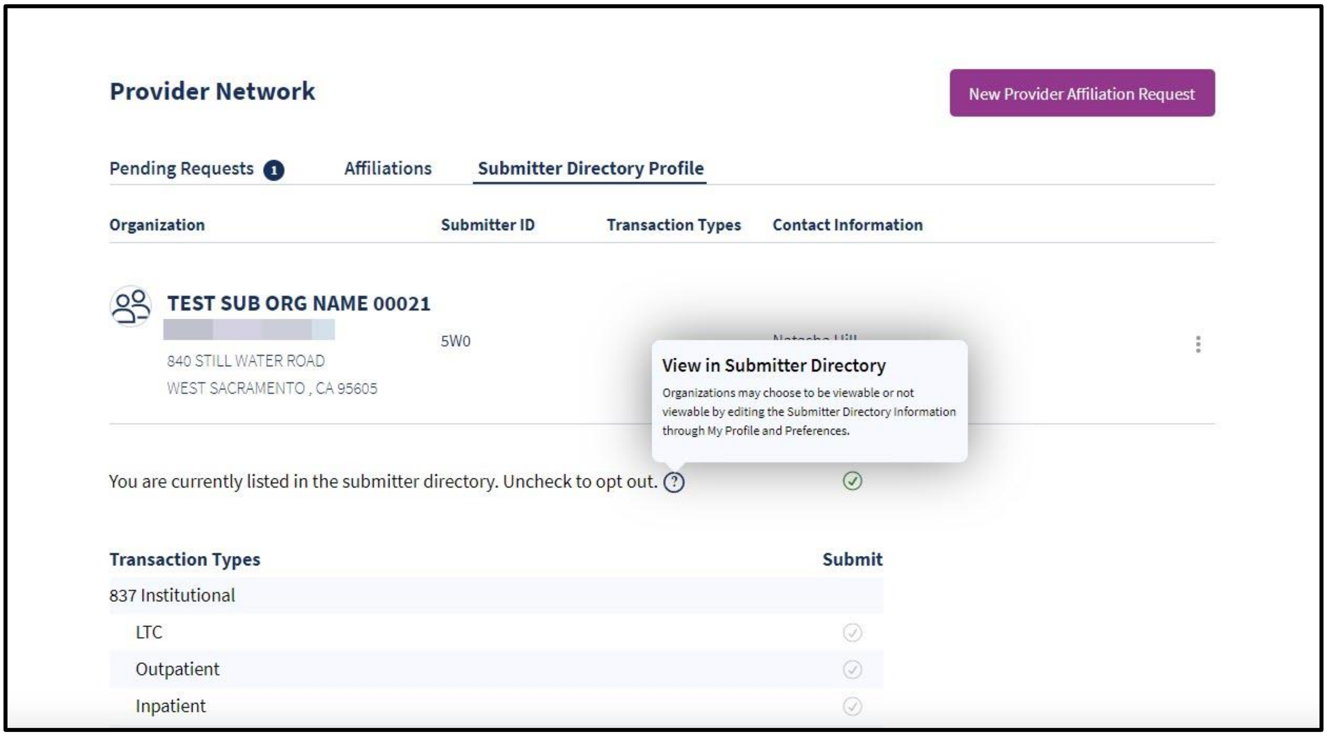


Figure 15.7: Submitter Directory Profile

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

Appendix

Acronyms

Acronym	Description
DHCS	Department of Health Care Services
EIN	Employer Identification Number
NPI	National Provider Identifier
Org Admin	Organizational Administrator
OTP	One Time Passcode
PIN	Personal Identification Number
POS	Point of Service
SSN	Social Security Number
SMS	Short Message Service

Page updated: September 2022

Enter Notes Here