

# 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.

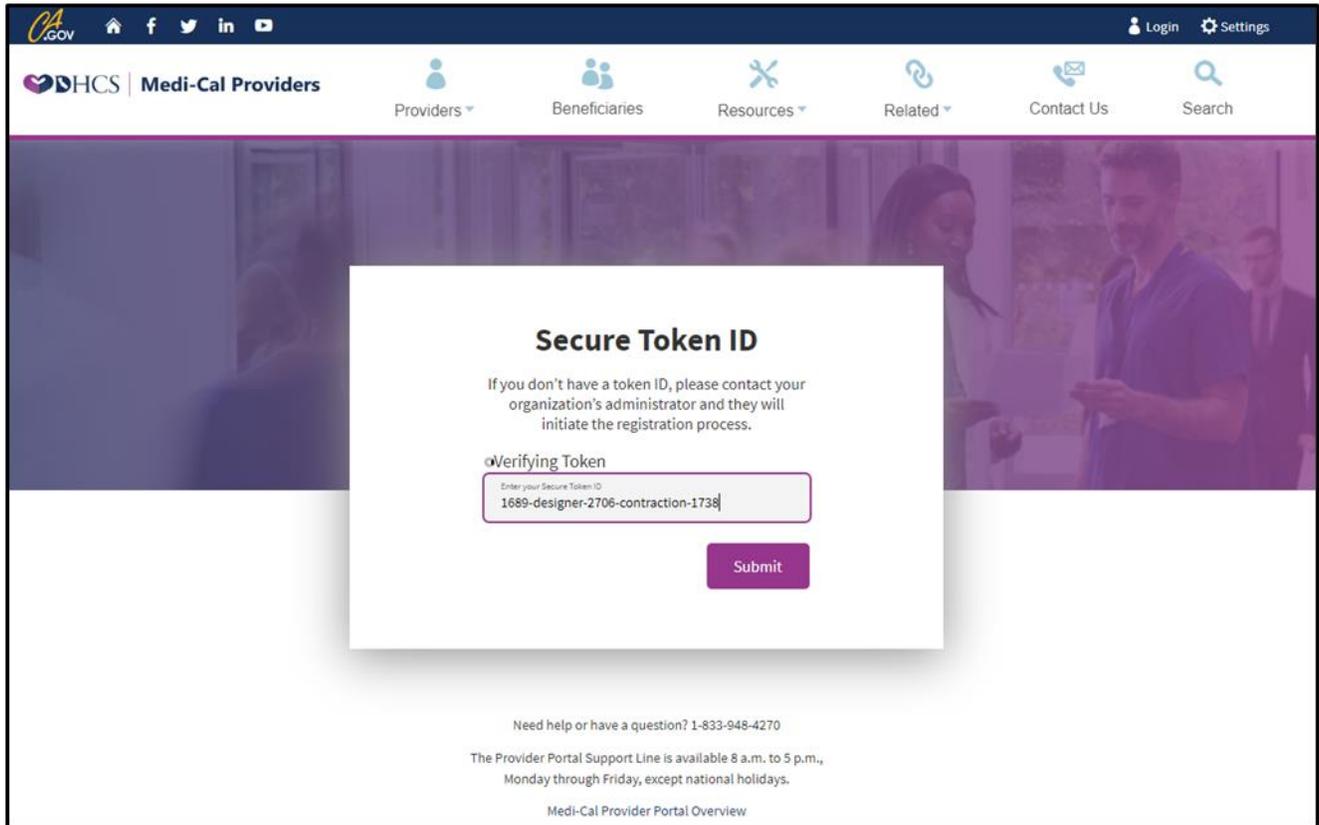


**Figure 1.1:** Email with registration link provided.

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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.**

## 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 on behalf of my organization.

[Next](#)

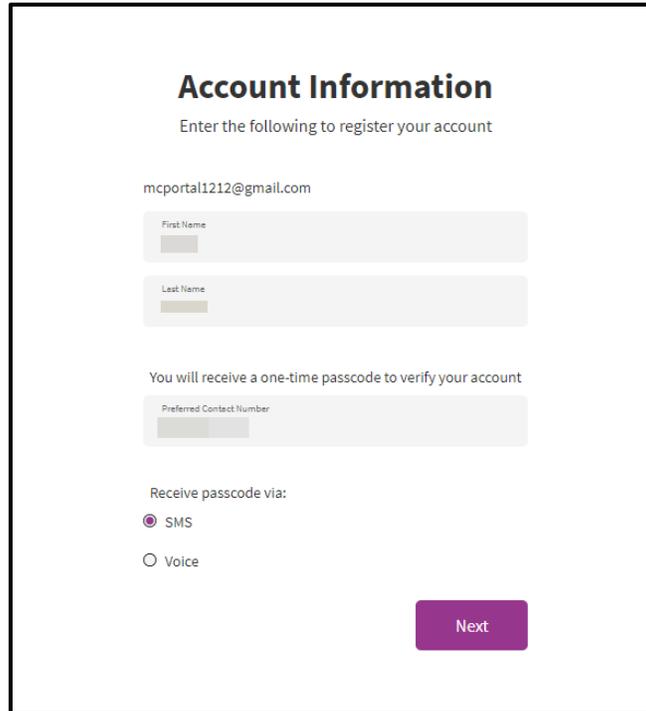
**Figure 1.3:** Terms and Conditions window.

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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**.

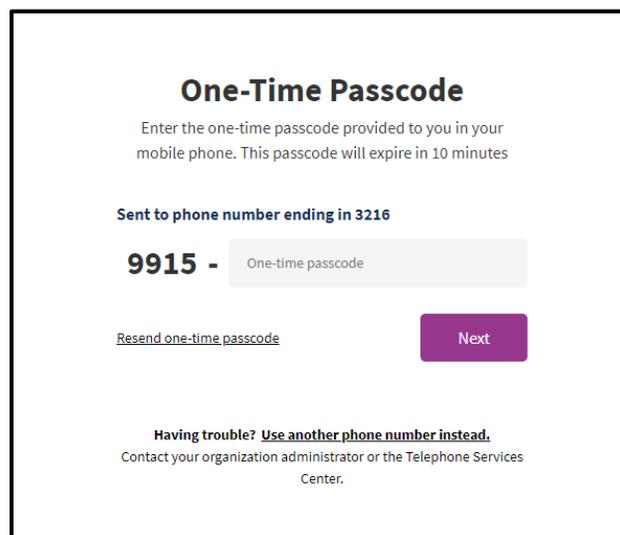
**Note:** Various functions throughout the Provider Portal may request an OTP.



The screenshot shows a registration form titled "Account Information". Below the title is the instruction "Enter the following to register your account". The form includes a text input field for an email address, which is pre-filled with "mcportal1212@gmail.com". Below this are two input fields for "First Name" and "Last Name". A message states "You will receive a one-time passcode to verify your account", followed by a "Preferred Contact Number" input field. There are two radio button options: "SMS" (selected) and "Voice". A purple "Next" button is located at the bottom right of the form.

**Figure 1.4:** Account information screen.

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



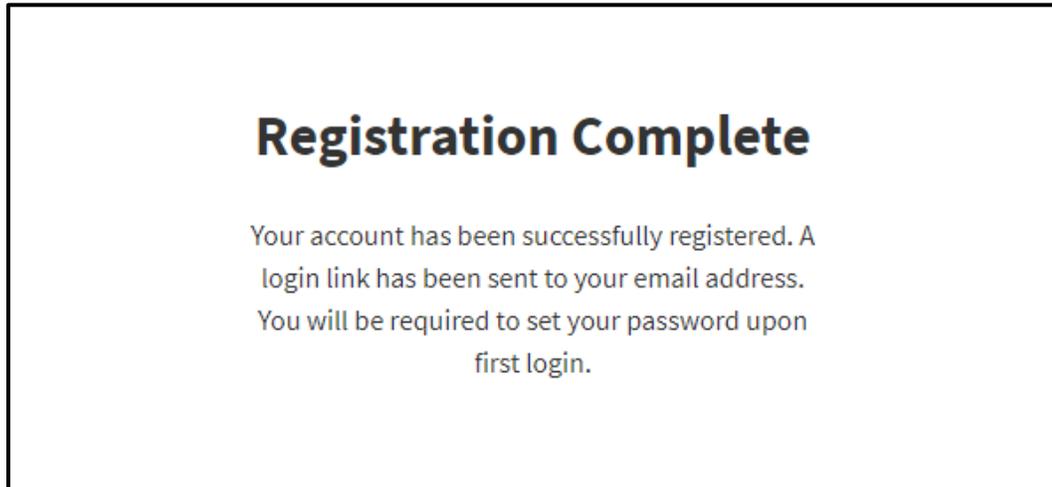
The screenshot shows a screen titled "One-Time Passcode". The instruction reads "Enter the one-time passcode provided to you in your mobile phone. This passcode will expire in 10 minutes". Below this, it says "Sent to phone number ending in 3216". A large "9915" is displayed, followed by a hyphen and a text input field labeled "One-time passcode". A "Resend one-time passcode" link is on the left, and a purple "Next" button is on the right. At the bottom, there is a link: "Having trouble? Use another phone number instead." and a note: "Contact your organization administrator or the Telephone Services Center."

**Figure 1.5:** OTP input area.

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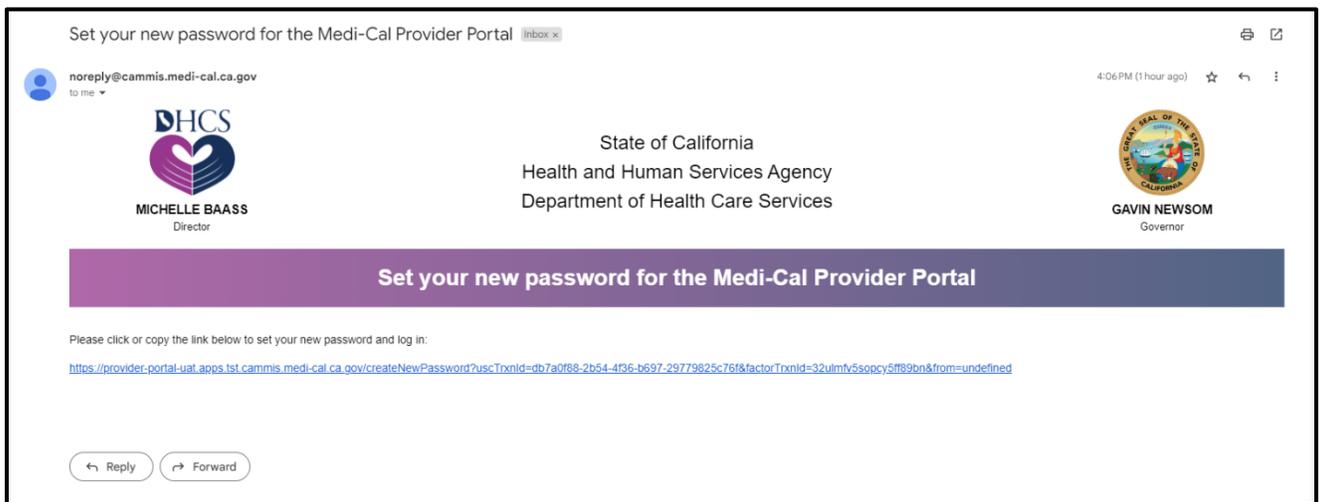
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6. A window appears stating Registration is Complete.



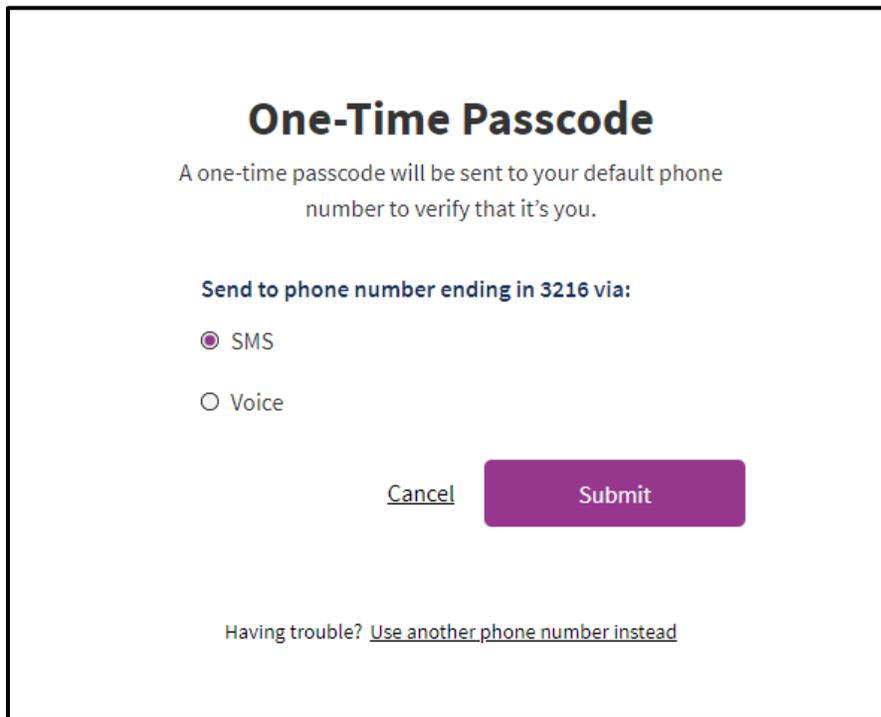
**Figure 1.6:** Registration Complete window.

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.



The screenshot shows a web form titled "One-Time Passcode". Below the title, it states: "A one-time passcode will be sent to your default phone number to verify that it's you." The form asks the user to "Send to phone number ending in 3216 via:" and provides two radio button options: "SMS" (which is selected) and "Voice". At the bottom of the form, there are two buttons: "Cancel" (a text link) and "Submit" (a purple button). Below the buttons, there is a link: "Having trouble? [Use another phone number instead](#)".

**Figure 1.8:** OTP verification method area.

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9. 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

**3807 -**

[Resend one-time passcode](#)

**Having trouble?**  
Contact your organization administrator or the Telephone Services Center.

**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.

**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

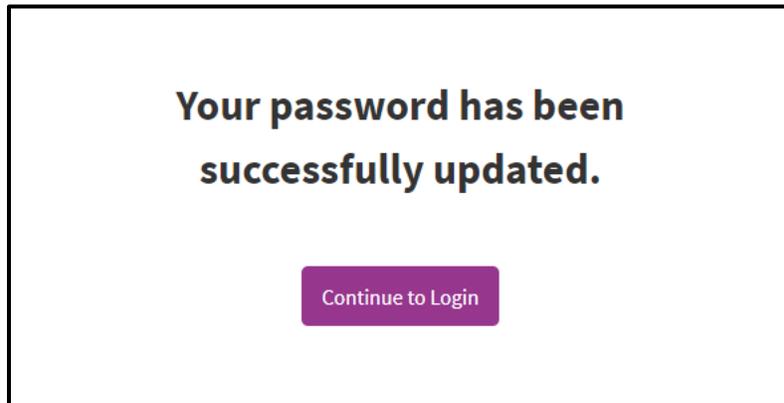
Re-Enter Password

[View Password Requirements](#)

**Submit**

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

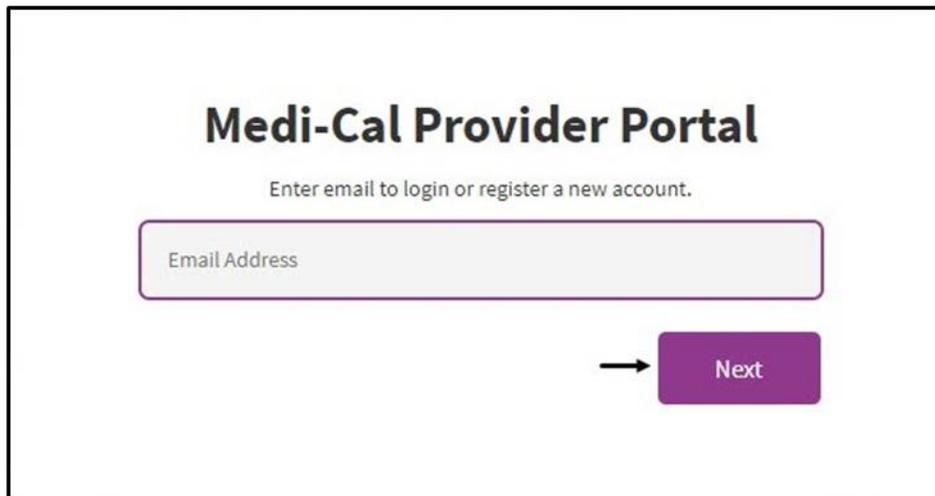
11. A message will display notifying the user that their password has been successfully updated.



**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**.



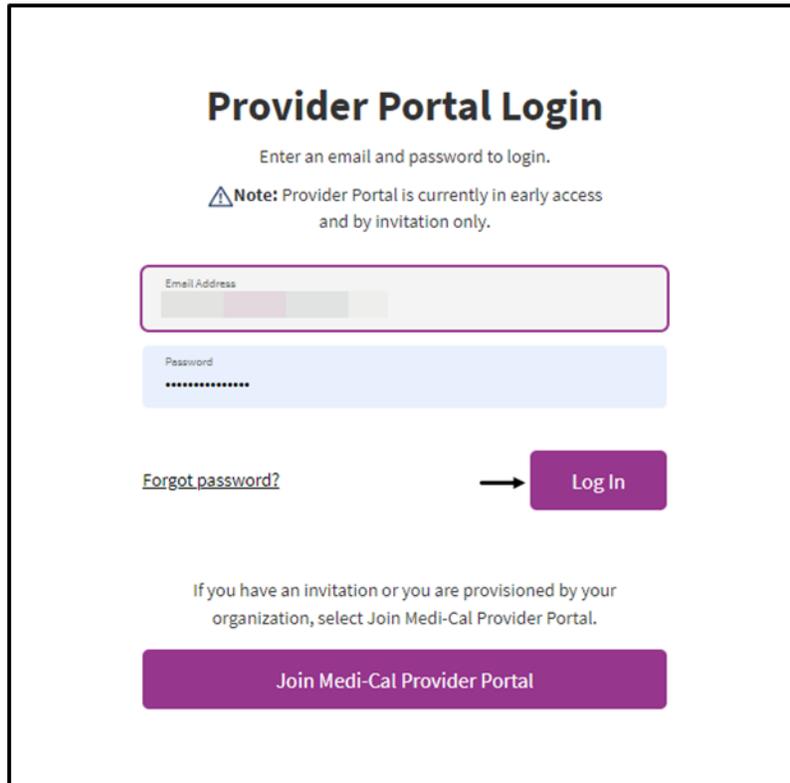
The screenshot shows the login page for the Medi-Cal Provider Portal. At the top, the title "Medi-Cal Provider Portal" is displayed in a large, bold, black font. Below the title, the instruction "Enter email to login or register a new account." is written in a smaller, gray font. A light gray input field with rounded corners and a thin purple border contains the placeholder text "Email Address". To the right of the input field, there is a purple button with the word "Next" in white text, preceded by a black right-pointing arrow.

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

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



The screenshot shows the 'Provider Portal Login' interface. At the top, the title 'Provider Portal Login' is displayed in a large, bold, black font. Below the title, the instruction 'Enter an email and password to login.' is centered. A note with a warning icon states: 'Note: Provider Portal is currently in early access and by invitation only.' Below the note are two input fields: 'Email Address' (a light gray field with a purple border) and 'Password' (a light blue field with a purple border and masked characters). To the left of the 'Log In' button is a link for 'Forgot password?' with an arrow pointing to the button. The 'Log In' button is a purple rectangle with white text. Below the login fields, there is a message: 'If you have an invitation or you are provisioned by your organization, select Join Medi-Cal Provider Portal.' and a purple button labeled 'Join Medi-Cal Provider Portal'.

**Figure 2.2:** Provider Portal Login screen.

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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.

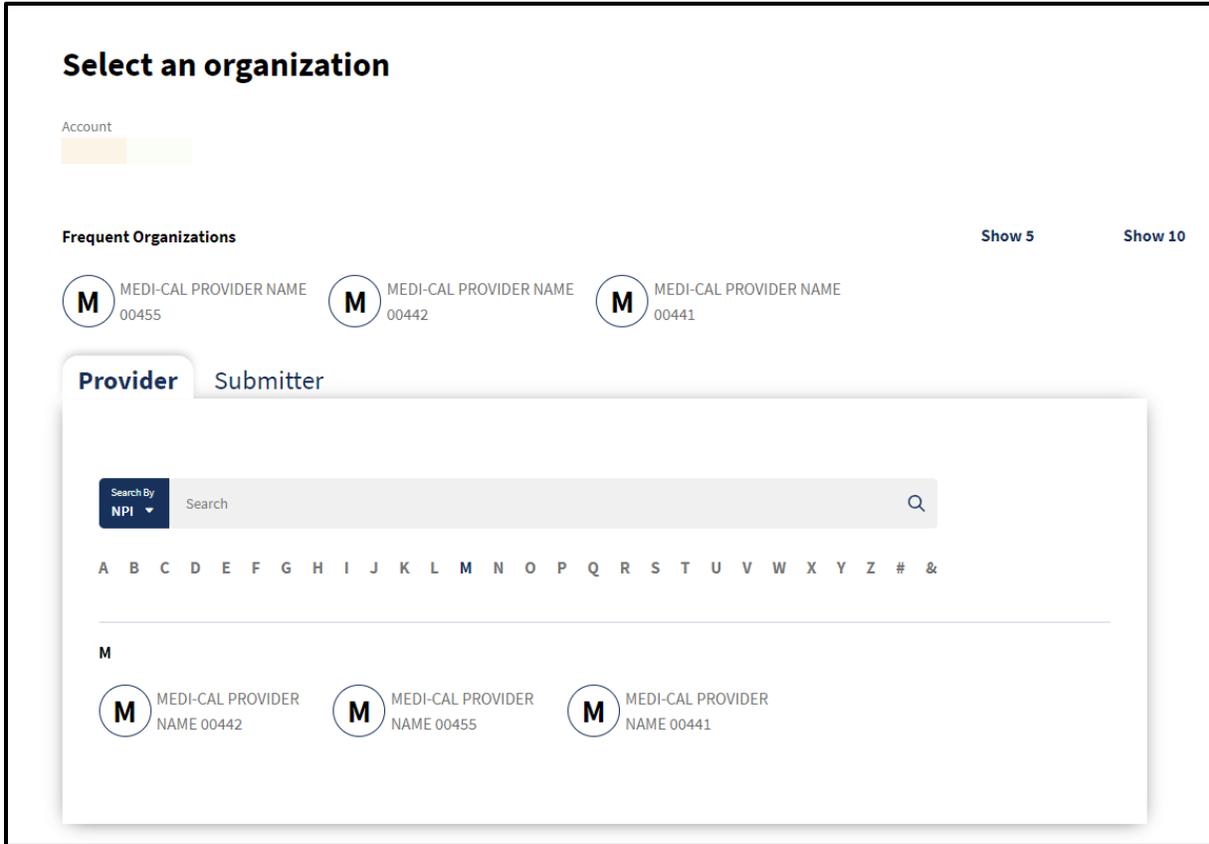


Figure 2.3: Select an organization page.

# 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.

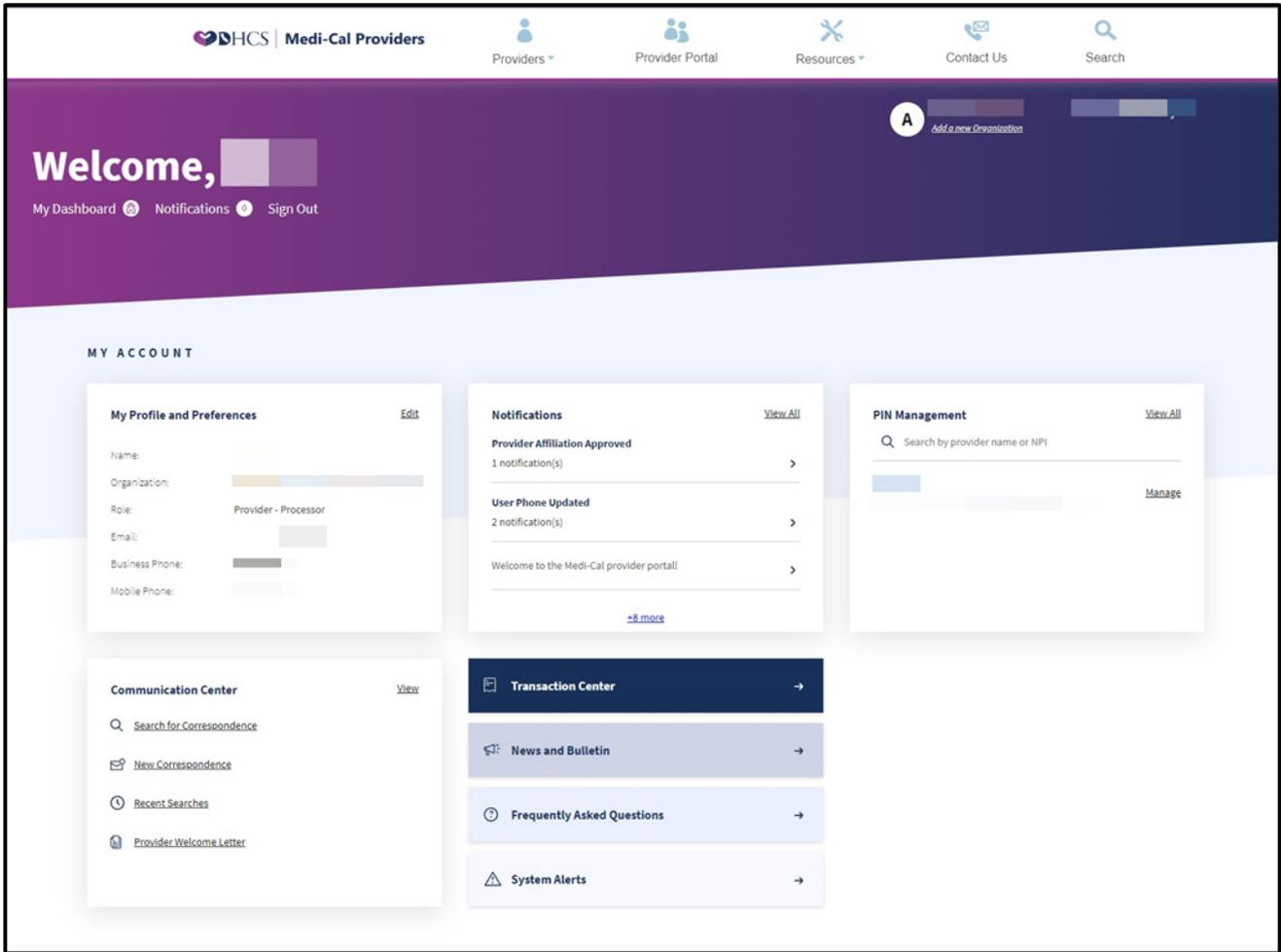


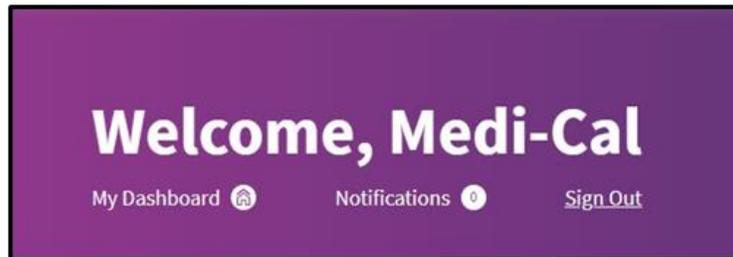
Figure 3.1: Provider Portal homepage.

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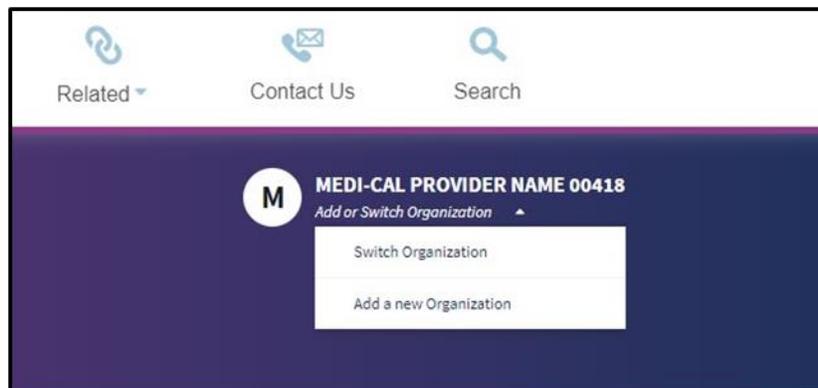
In the upper left corner, the options available are:

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



**Figure 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.



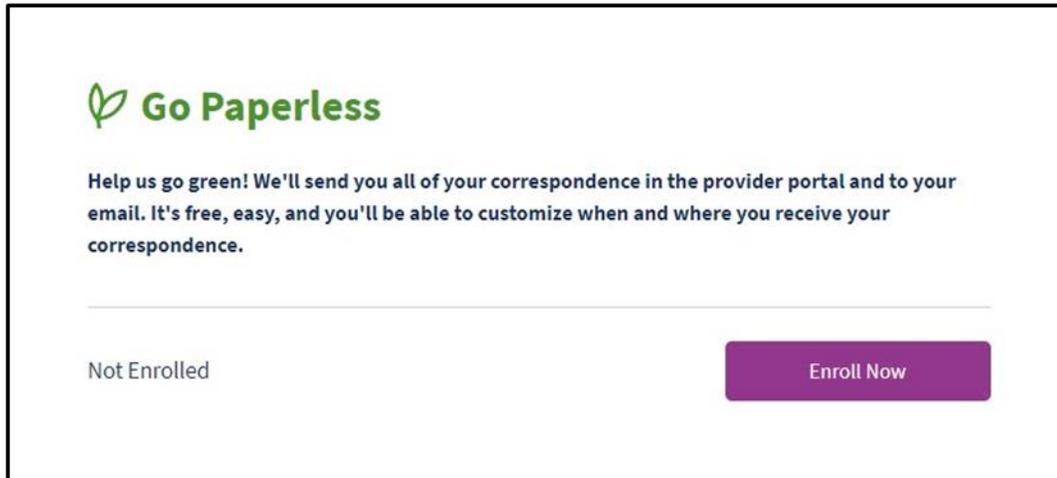
**Figure 3.3:** Drop-down menu options to add or switch organization.

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.



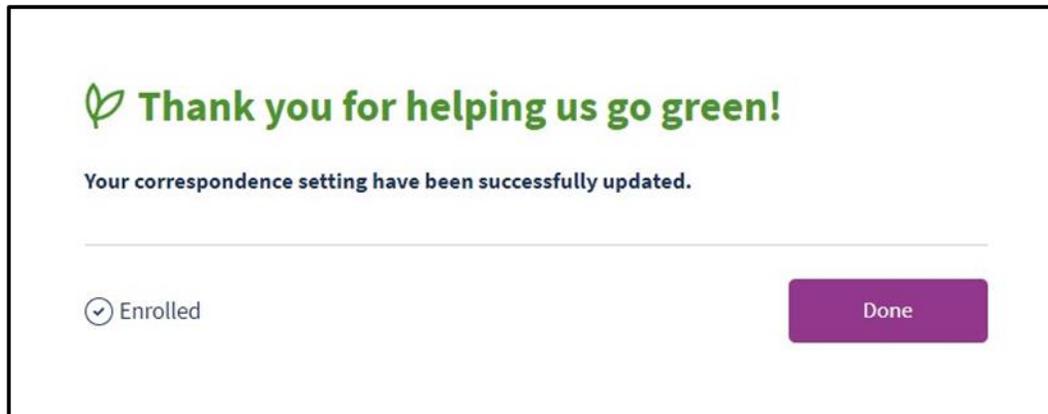
**Figure 3.4:** Go Paperless link.

Select **Enroll Now**.



**Figure 3.5:** Go Paperless page with Enroll Now selection.

The user will receive a successfully enrolled message.

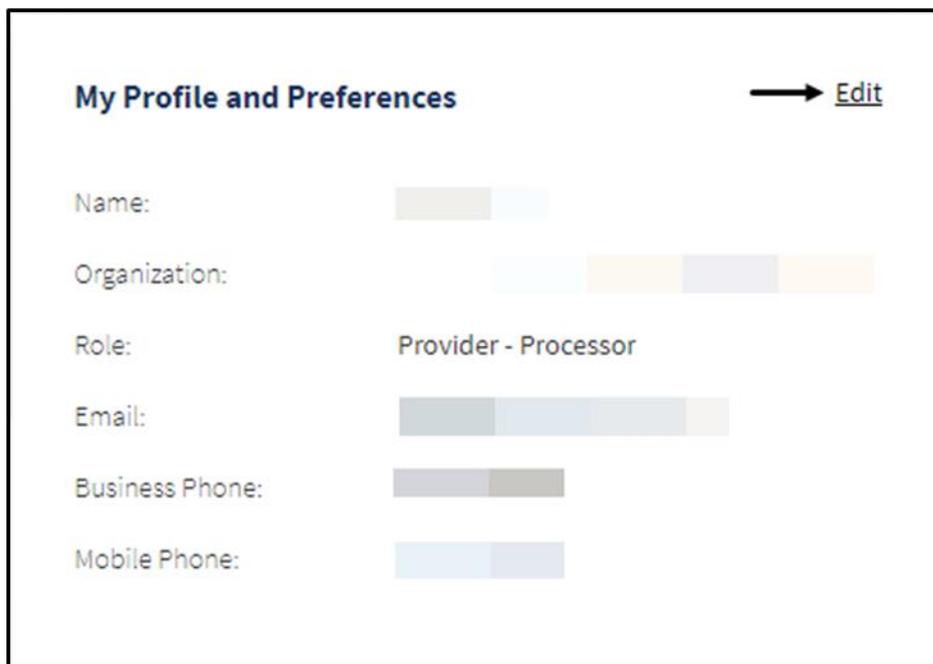


**Figure 3.6:** Successfully enrolled in paperless correspondence message.

# 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.

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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 with the following sections:

- Personal Information**: Includes fields for Name, Organization, Role (Processor), and Email. Each field has a corresponding 'Edit' link. The Organization and Role fields include lock icons.
- Phone Number**: Includes fields for Business Phone and Mobile Phone. The Mobile Phone field has a status indicator 'Assigned to two-factor authentication' and an 'Edit' link.
- Two-factor authentication**: A text block explaining that it is an extra layer of security for the user account.
- Password**: Includes a password field with a masked input (represented by asterisks) and an 'Edit' link.

**Figure 4.2:** Edit Account Information page.

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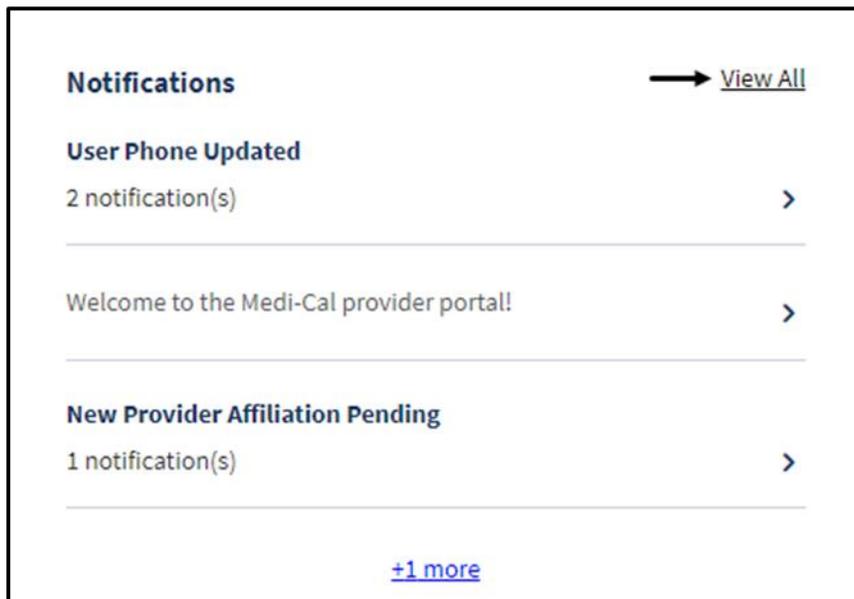
Under **Notifications Preferences** the frequency of notifications can be changed by selecting the dropdown menu for the desired notification. Users automatically receive notifications within the Provider Portal via the **Notifications** tile on the homepage. Users have the option of also receiving email notifications by selecting the Email checkbox. Once changes have been completed, select **Save Changes**.

	Portal	Email	Notification Frequency
<b>New Correspondence</b>			
Notice Of Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
Provider Welcome Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
McWeb Transition Countdown	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
835 Receiver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
TAR Acknowledgement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily
<a href="#">Show Less</a>			
<b>Password</b>			
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
			<a href="#">Save Changes</a>

**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**.

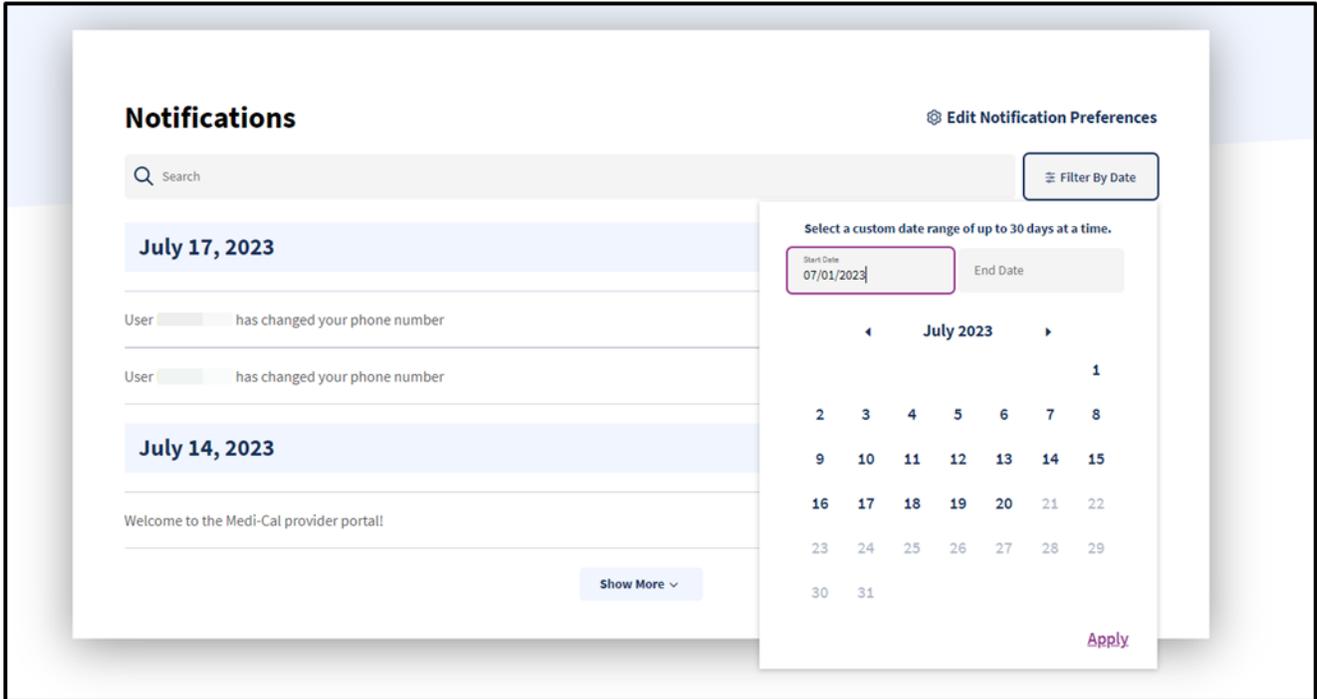


**Figure 4.4:** The Notifications tile.

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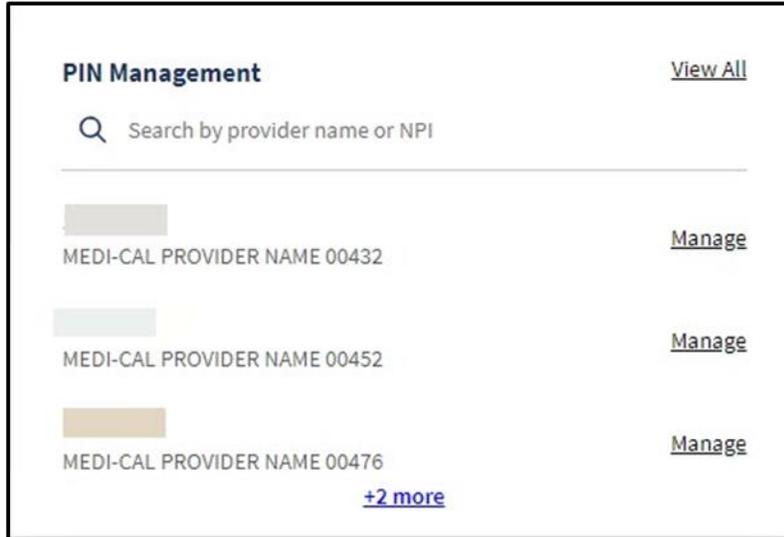
Once View All or +more is selected, a page appears with all past and current notifications. Past notifications can be viewed by using the search field or by using the **Filter By Date** feature. To use this feature, select the Filter By Date menu and enter the desired date range and select **Apply**.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

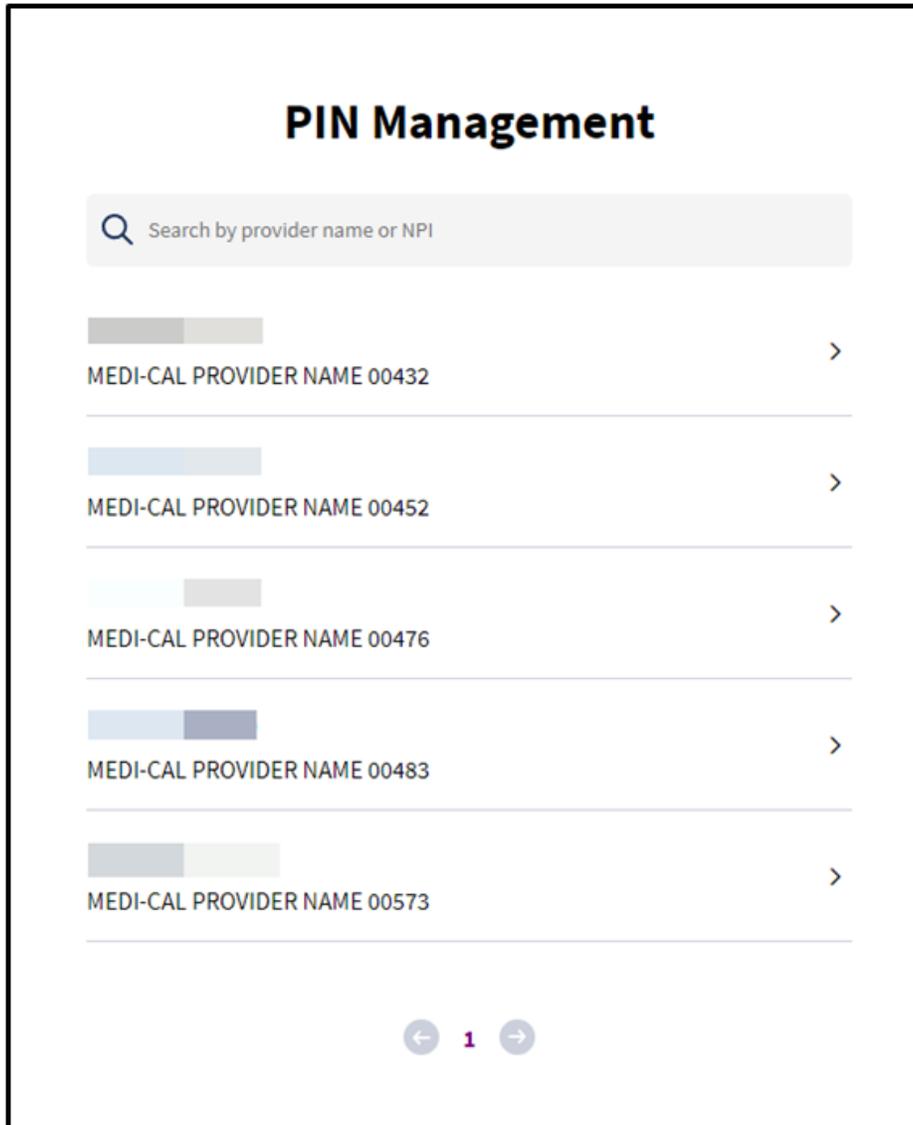


**Figure 4.7:** PIN Management tile search bar.

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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 a web interface titled "PIN Management". 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 unique ID, and a right-pointing chevron icon. The entries are: 00432 (grey bar), 00452 (blue bar), 00476 (light green bar), 00483 (dark blue bar), and 00573 (grey bar). At the bottom of the list, there are navigation controls: a left arrow, the number "1", and a right arrow.

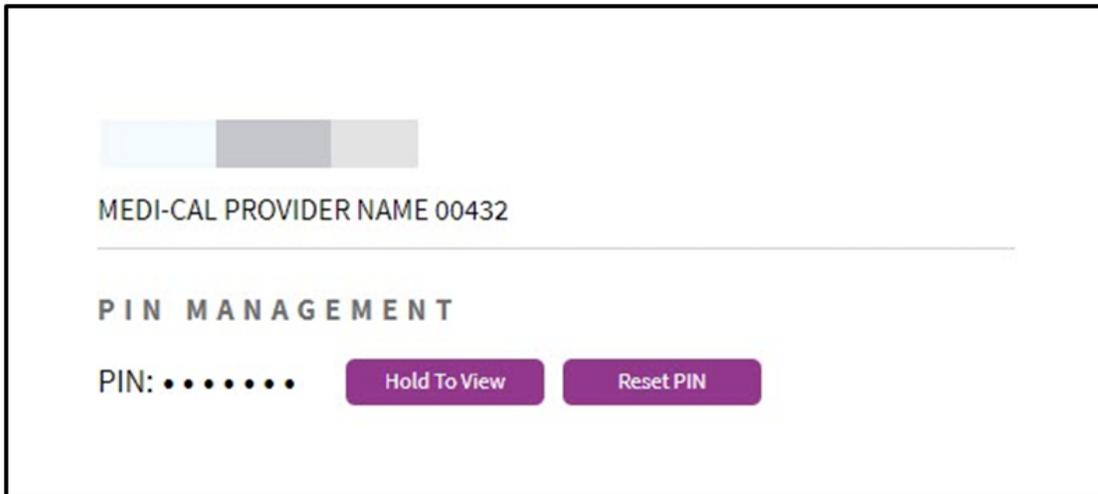
**Figure 4.8:** Search by provider name or NPI.

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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 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.

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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.

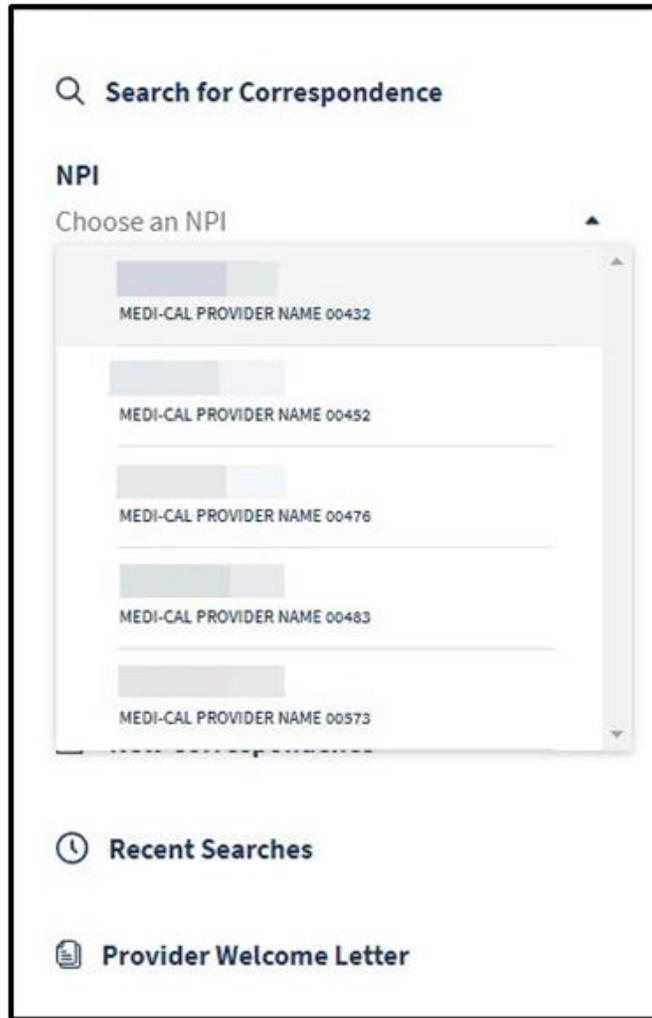
The screenshot shows a web interface for searching correspondence. On the left side, there is a sidebar with the title "Search for Correspondence" and a magnifying glass icon. Below the title are three dropdown menus: "NPI" with the placeholder text "Choose an NPI", "Correspondence Type" with "Choose Document Type", and "Dates" with "Choose Date Range". A purple "Search" button is positioned below these menus. At the bottom of the sidebar, there are three menu items: "New Correspondence" with an envelope icon, "Recent Searches" with a clock icon, and "Provider Welcome Letter" with a document icon. The main content area on the right is titled "Document Results" and shows "0 Documents | Last 0 days". Below this, there are two column headers: "Name" and "Date", both with a downward arrow indicating they are dropdown menus. A message "Click filters and search to show documents" is displayed in the center of the main area.

**Figure 4.11:** Search for Correspondence screen.

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



**Figure 4.12:** Search for Correspondence screen with NPI selected.

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

Search for Correspondence

**NPI**  
1023037108 - MEDI-CAL PROVIDER NAME ...

**Correspondence Type**  
Choose Document Type

- Appeal Letter
- CIF Acknowledgement/Response
- Notice of Action - Provider Copy
- PDF Remittance Advice Detail**
- Provider Check Acknowledgement
- SCPI Data File

Recent Searches

Provider Welcome Letter

Tax Documents

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

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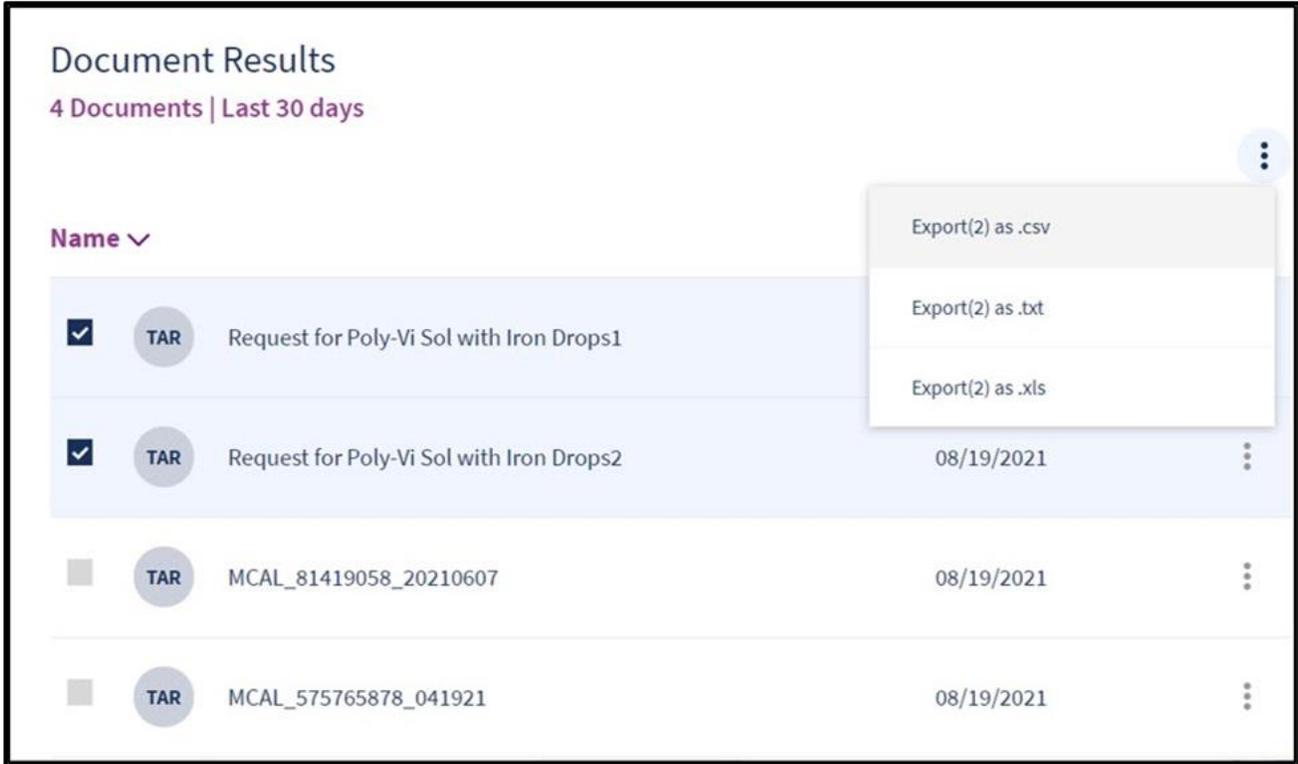
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Select a **Date Range** option or select a start and end date.

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 filters 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 expanded, showing a "Choose Date Range" dropdown menu. The modal window displays four options: "Last 7 Days", "Last 14 Days", "Last 30 Days", and "Custom". The "Custom" option is selected, and a message reads "Select a custom date range of up to 30 days at a time." Below this, there are two input fields: "Start Date" (containing "06/01/2022") and "End Date". A calendar for "June 2022" is shown below the input fields, with dates from 1 to 30. An "Apply" button is located at the bottom right of the modal.

**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.

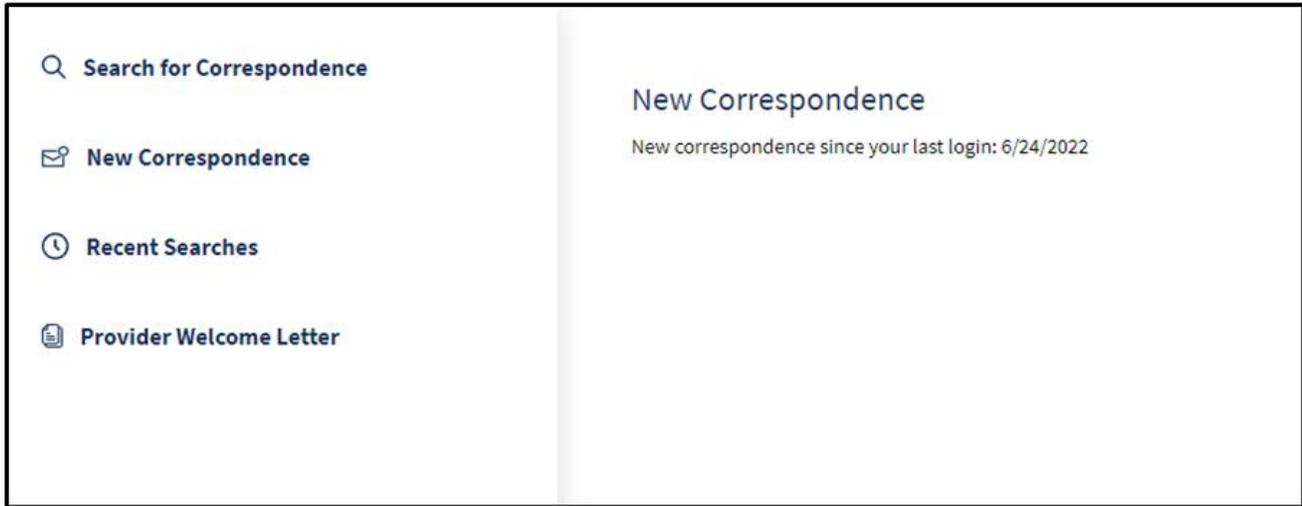


**Figure 4.15:** Search results displayed on the **Document Results** page.

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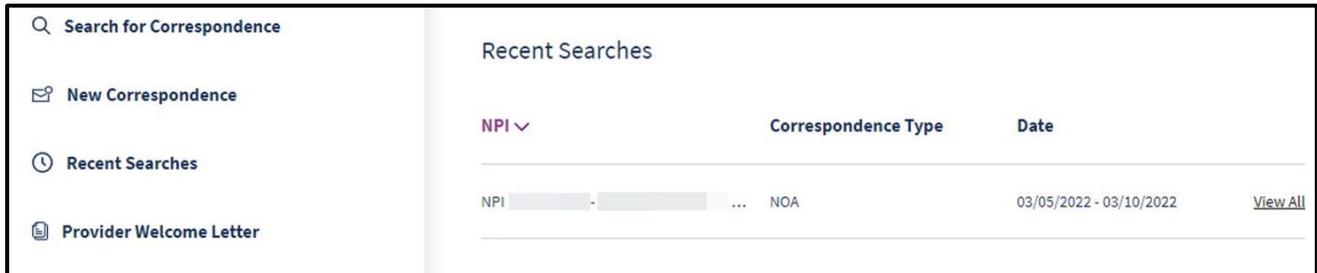
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Lists all **New Correspondence** since the last time a user has logged in.



**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**.

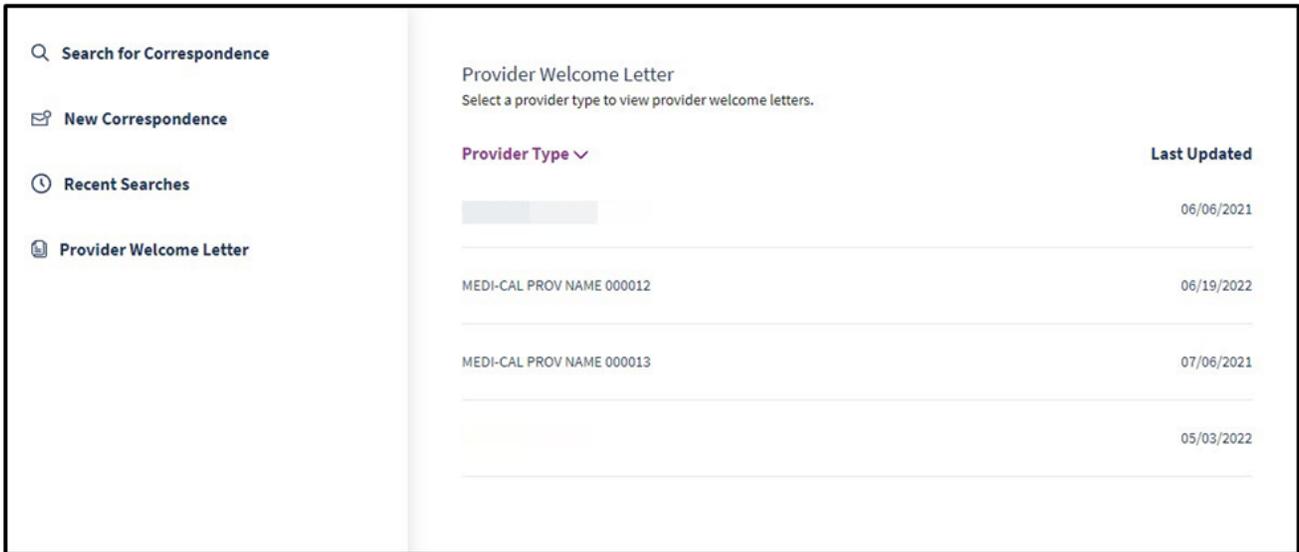
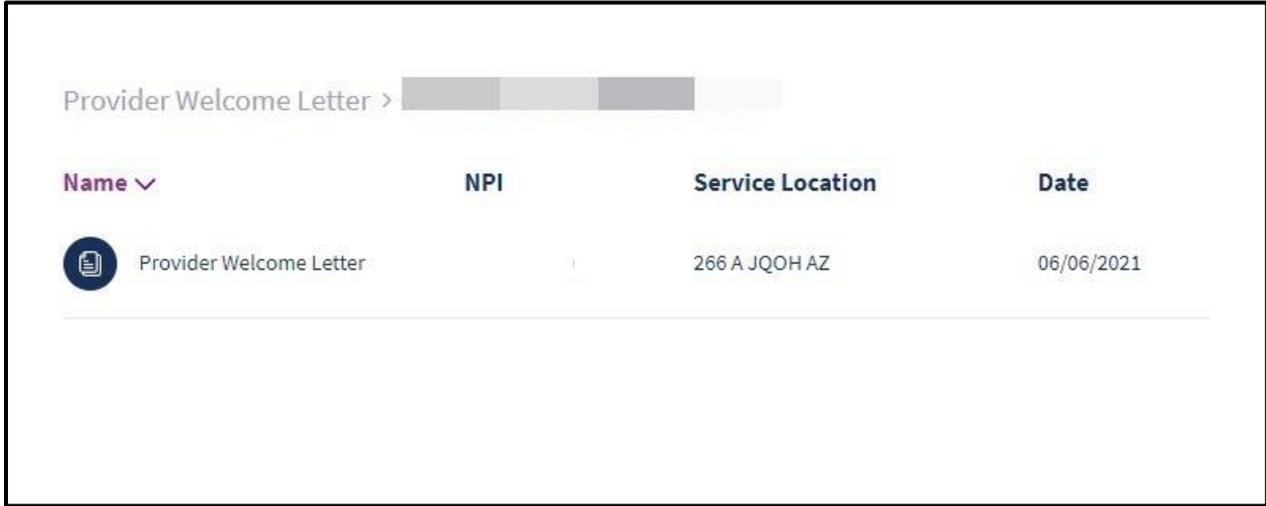


Figure 5.1: Provider Welcome Letter selected from the Communication Center tile.

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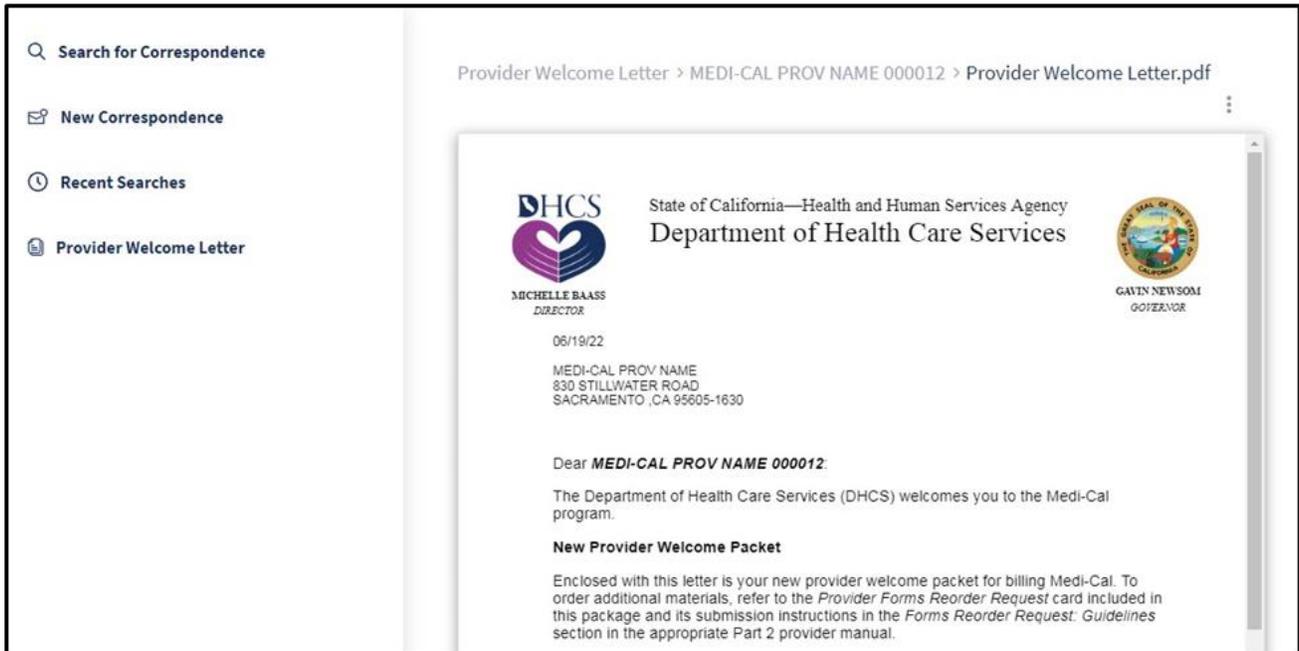
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2. Provider Welcome letters for NPIs assigned to that provider community appear. Click the desired letter.



**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.

The screenshot shows a web interface for the 'Tax Documents' section. On the left is a navigation sidebar with four items: 'Search for Correspondence', 'New Correspondence', 'Recent Searches', and 'Provider Welcome Letter'. 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 options, 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.

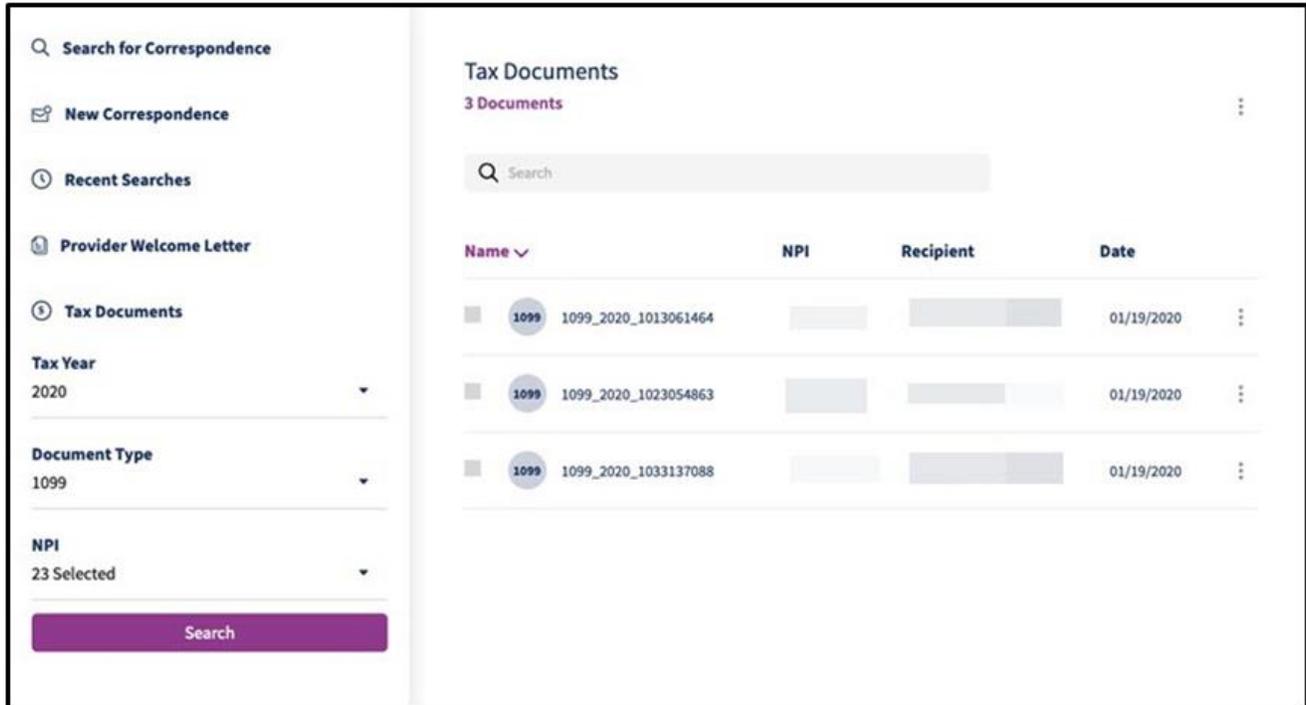
[I Do Not Agree](#)

Figure 6.1: Electronic 10999 Consent Agreement form.

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Next a list of tax documents will appear.



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

## Additional Resources

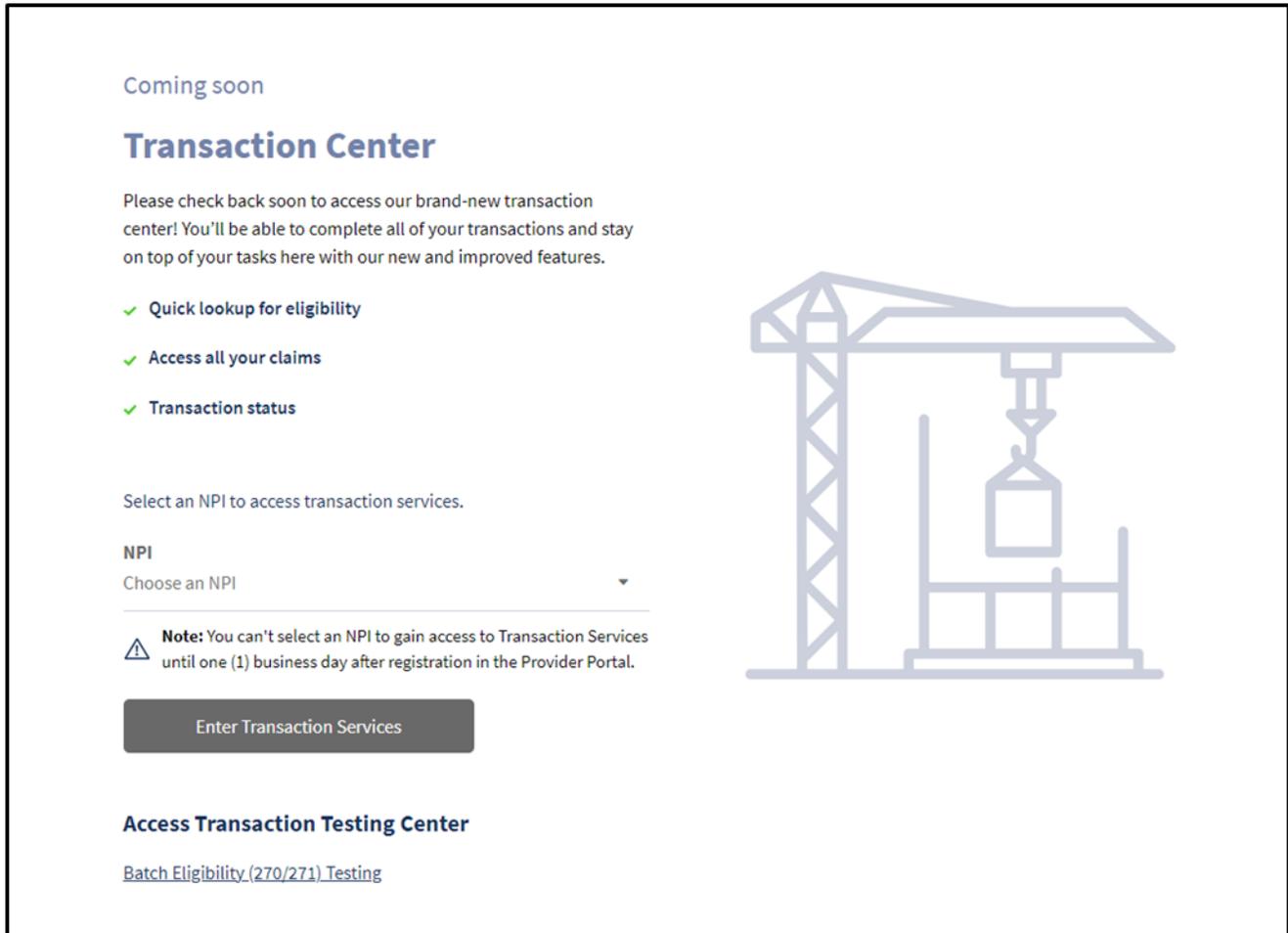
The Provider Portal contains several useful links on the dashboard. Refer to each of the following sections for details.



**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.

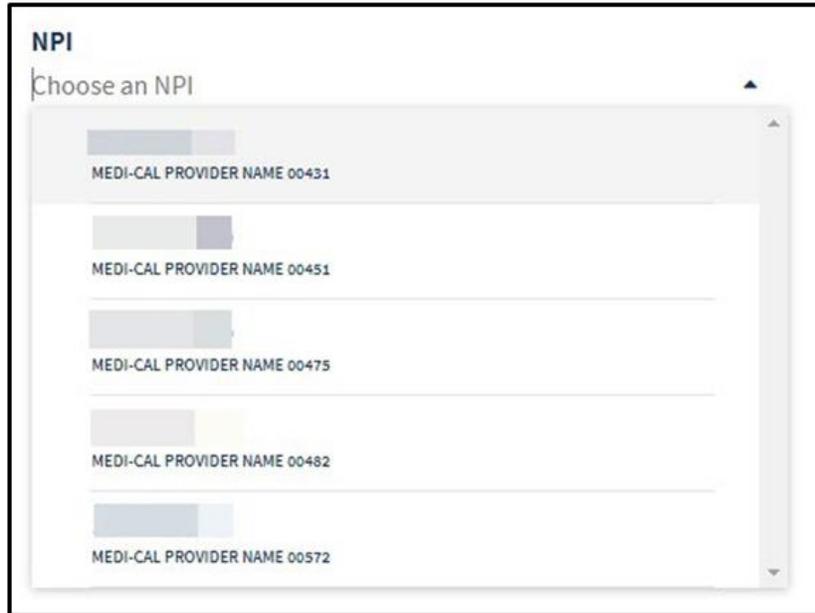


**Figure 7.1:** Transaction Center coming soon screen.

## A Provider Portal Processor Role

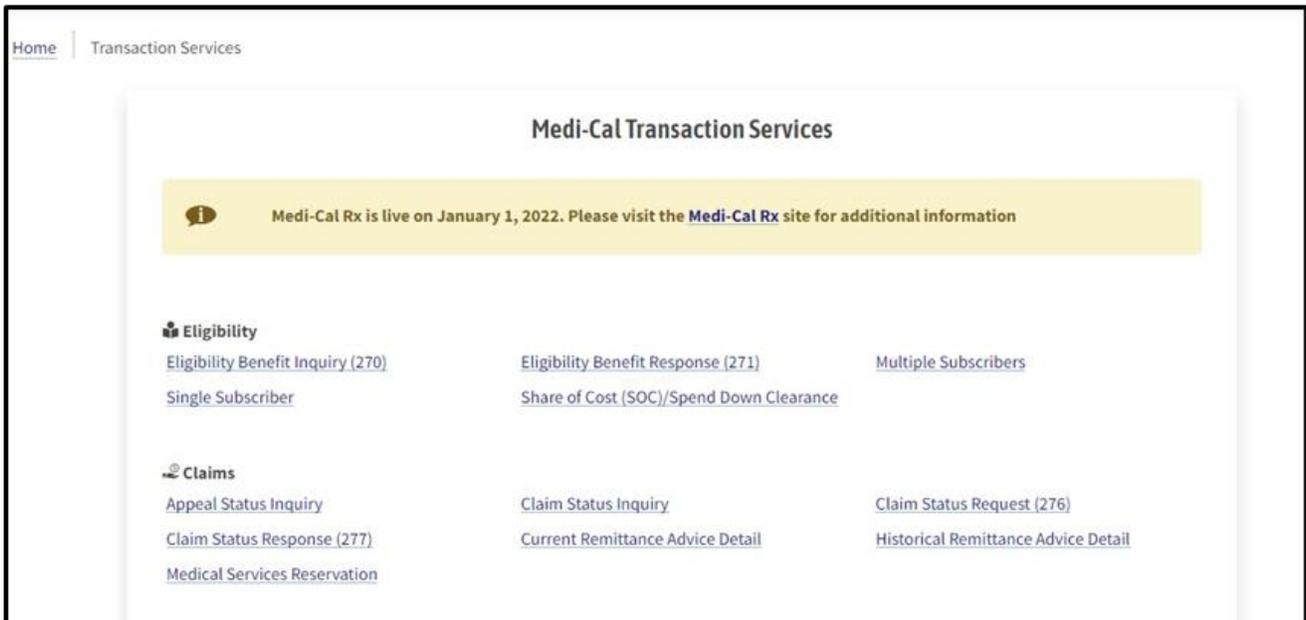
Page updated: September 2022

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.

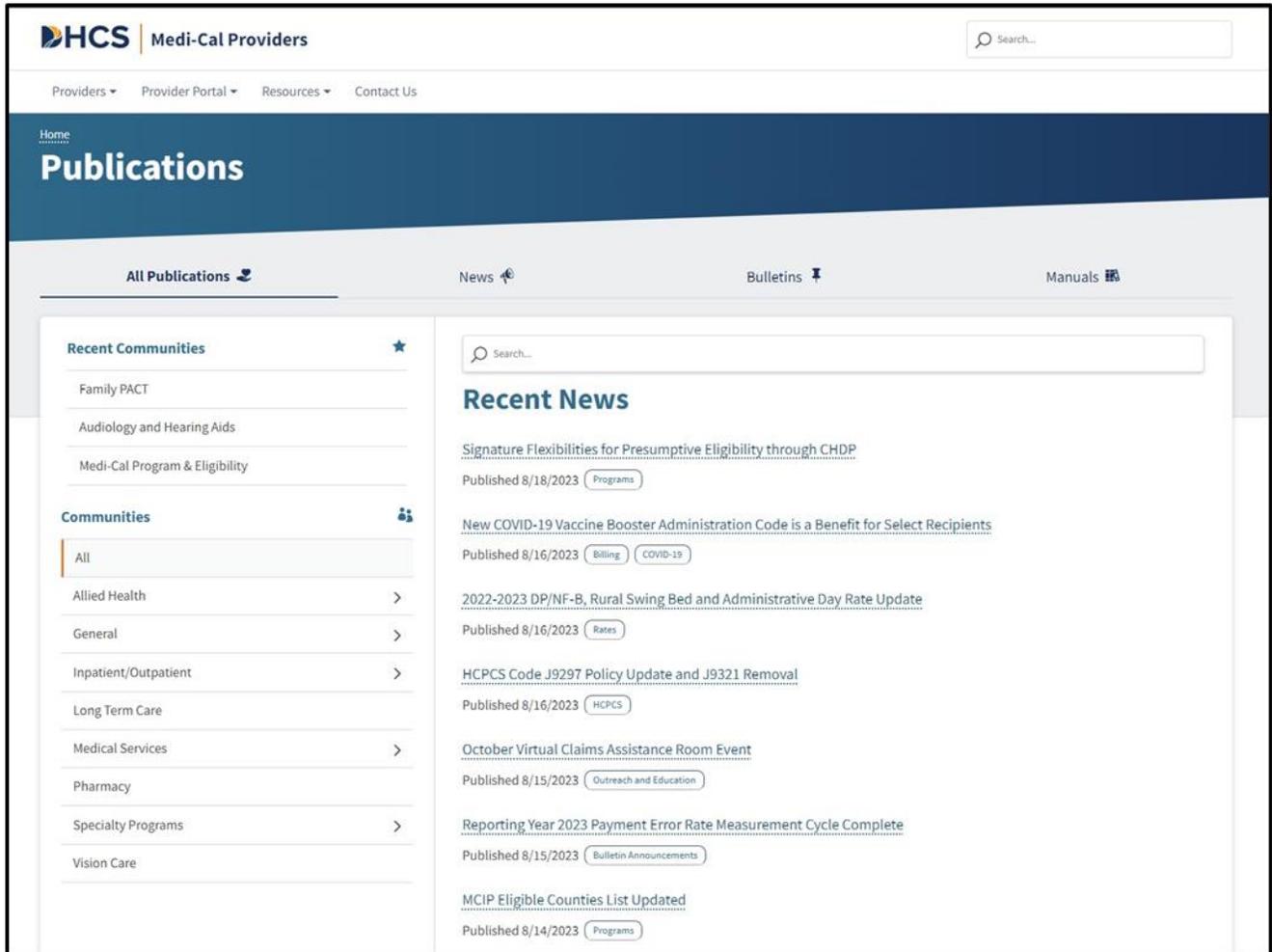


Figure 8.1: The Community Navigation page with Communication tab selected.

# 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.

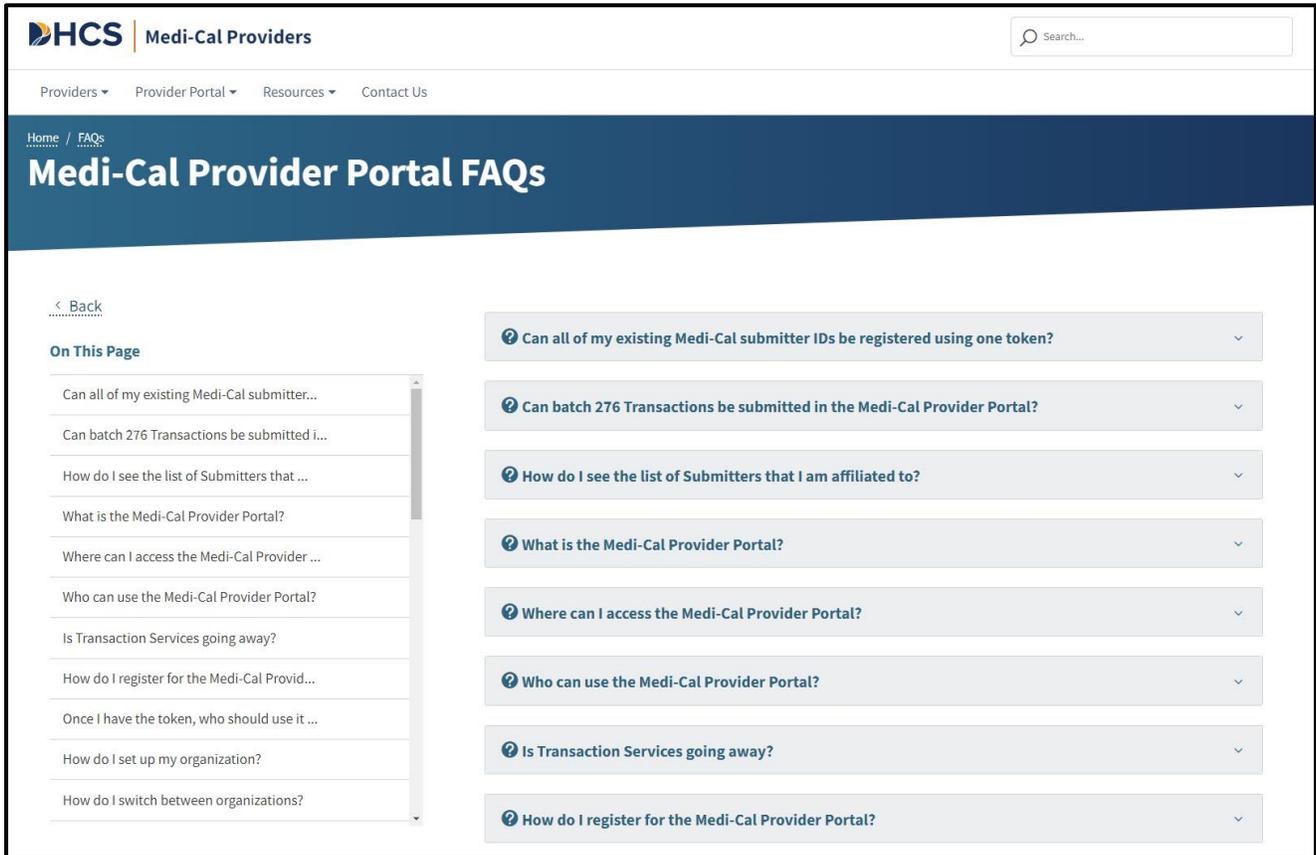


Figure 8.2: The Medi-Cal Provider Portal FAQ page.

# 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.

The screenshot displays the Medi-Cal Providers website's System Status page. At the top, the HCS logo and 'Medi-Cal Providers' text are visible. Below the logo is a navigation menu with links for 'Providers', 'Provider Portal', 'Resources', and 'Contact Us'. The main heading is 'System Status' with a 'Home' breadcrumb. The current system status is reported as 'Monday, August 21, 2023 at 01:30:08 PM'. A green checkmark icon precedes the text 'All Medi-Cal systems are functioning properly'. Below this, a paragraph explains that the Medi-Cal program continually strives to give providers the most current information available and that this page serves as an early warning system for any widespread problem. A section titled 'Medi-Cal Provider Website and Systems Maintenance Window' provides details about the normal maintenance window (midnight to 2 a.m.) and extended mainframe maintenance (second Sunday of every month from 2 a.m. to 6 a.m.), listing affected services like POS, AEVS, and PTN.

**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