State of California
Department of Health Care Services

Provider Portal: Submitter Organization User Guide

California Medicaid Management Information System

V 2.0

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Introduction to the Provider Portal

Provider Portal is an area of the Medi-Cal Providers website that houses personal information and day-to-day work for Medi-Cal providers and provider healthcare staff. It focuses on reducing paper communication increasing the security and accessibility of Medi-Cal electronic services and empowering users to administer their own organization within the Portal. The Provider Portal enables providers and submitters to:

- Perform billing work for multiple National Provider Identifiers (NPIs) with a single administrative account
- Interact with Medi-Cal more seamlessly
- Go Paperless
- Access Provider Portal Messages and Notifications and active alert notifications
- Organization and Submitter ID are always viewable and can be changed any time
- Perform self-service capabilities such as password and NPI Provider Identification Number (PIN) reset
- Request provider affiliation, view pending requests and the submitter directory profile
- Test Claim 837 and Eligibility Benefit 270/271 transactions

Provider Portal Menu

The **Administrator** has access to all Provider Portal features and organization administration functions. The **Processor** can use the submitter features within the Provider Portal, such as Transaction Testing, but cannot access the organization administration functions.

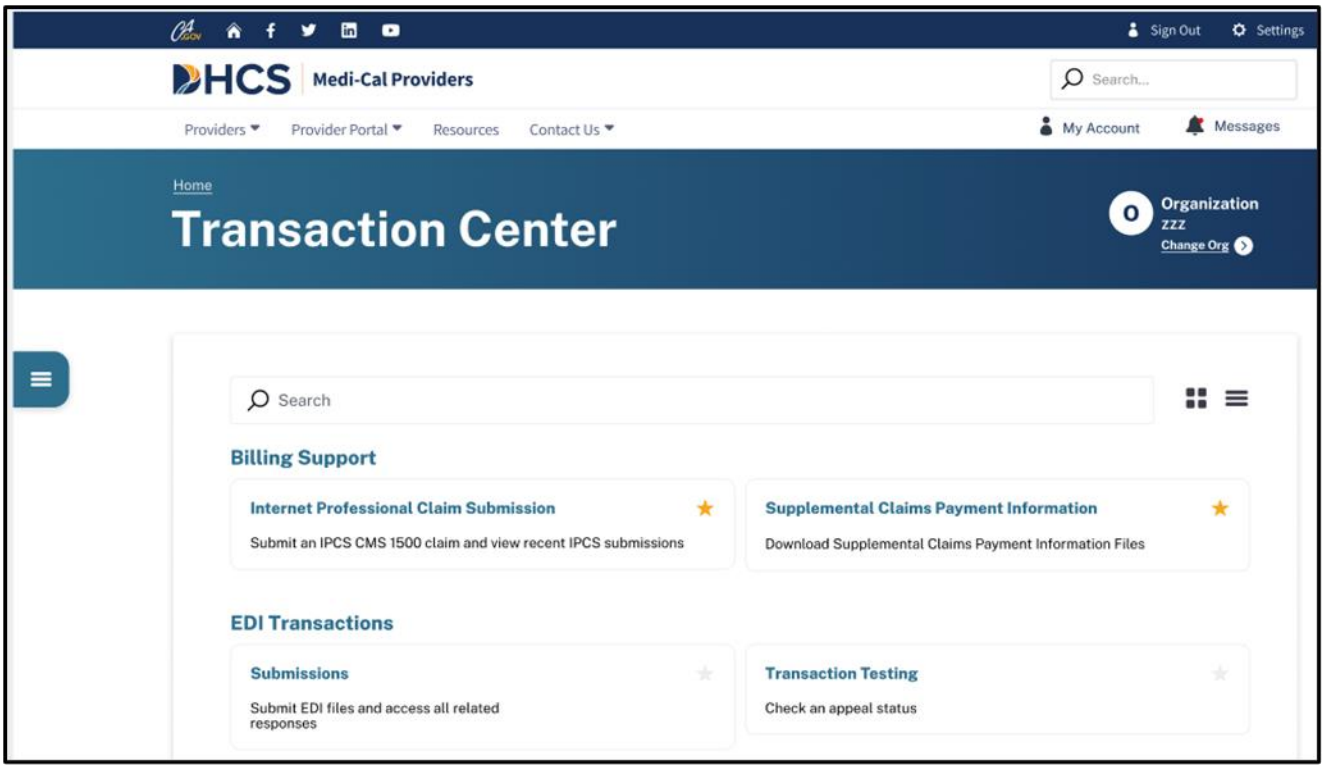

Figure 1.1: Transaction Center.

Overview of the Provider Portal menu.

- The **Transactions Center** allows a user to create and track various transactions and provides single sign on access to Transaction Center.
- **Manage Users** displays information about users within an organization. This area permits Administrators to update user permissions and information and add and remove user profiles.
- **Provider Network** allows a user to electronically search, view and download correspondence related to the organization. A user may search by NPI, document type or date.

- **Manage Organization** allows a user to view and edit Submitter information
- **My Account** allows users the ability to set or update their preferences by using the left navigation pane**.**
- **Message Center** tile allows a user to view unread and past notifications about an organization. Notifications can be searched for or filtered by date.
- **Add a Provider Org** allows an Organization Administrator to register an additional organization or NPI to manage billing, enrollments, and service locations for specific business entity.
- **Add a Submitter Org** allows an Organization Administrator to register an additional Submitter ID to manage batch claims and eligibility transactions for provider clients.

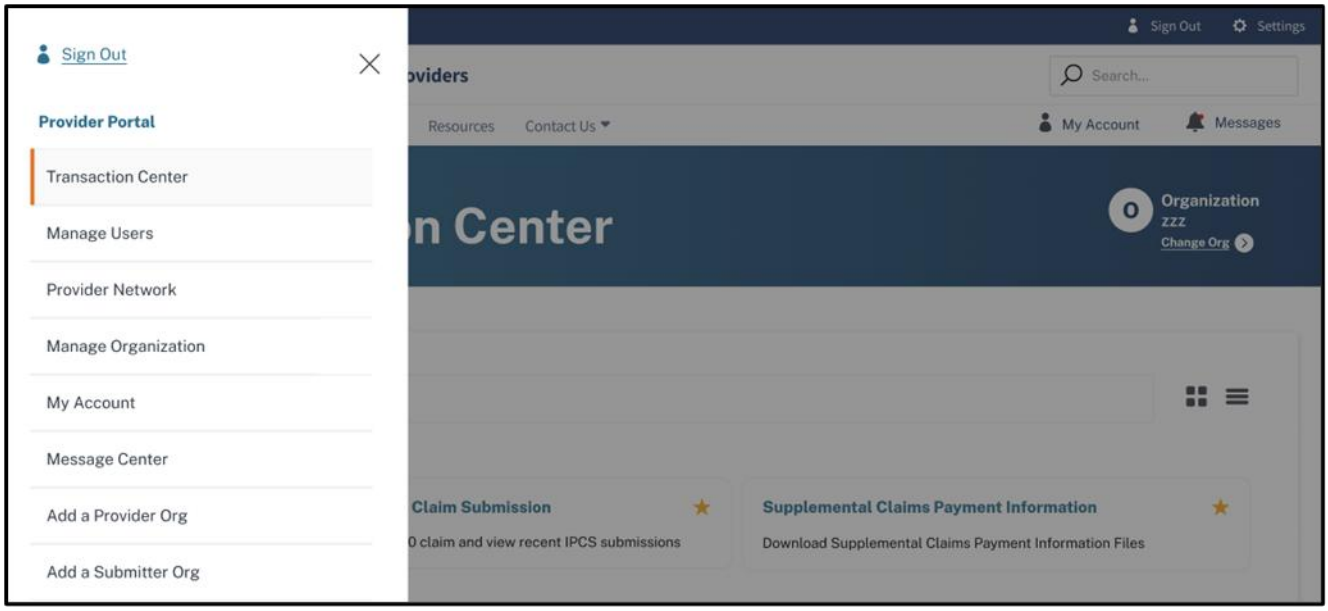

Figure 1.2: Provider Portal menu

Switch Organization

This feature is only available if a user has been granted access to multiple organizations by the organization's respective Administrator.

1. If a user wishes to switch to a different organization, the user can do so at any time by selecting the **Add or Switch Organization** drop-down menu from the top right-hand side of the **Transaction Center**, then selecting **Switch Organization**. Refer to the **Add New Organizations** for more information.

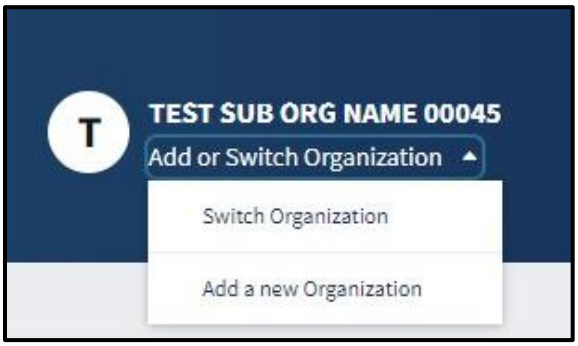

Figure 2.1: Add or Switch Organization.

2. The **Select an Organization** page appears and the user can switch organizations by selecting one of the items on the list.

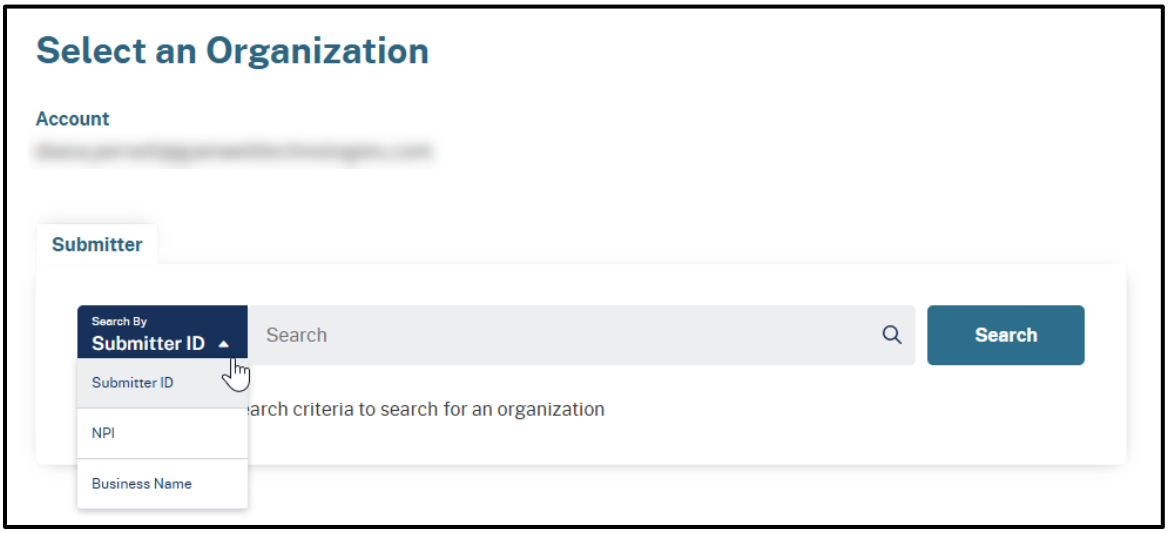

Figure 2.2: Switch Organization or Change Default.

Administer Organizations and Users

Add A New Organization

A new Medi-Cal Provider, Dental Provider, Behavioral Health Provider or Submitter organization can be added to your login. All organizations are visible upon login.

1. Select **Add a Provider Org** or **Add a Submitter Org** from the **Provider Portal menu**.

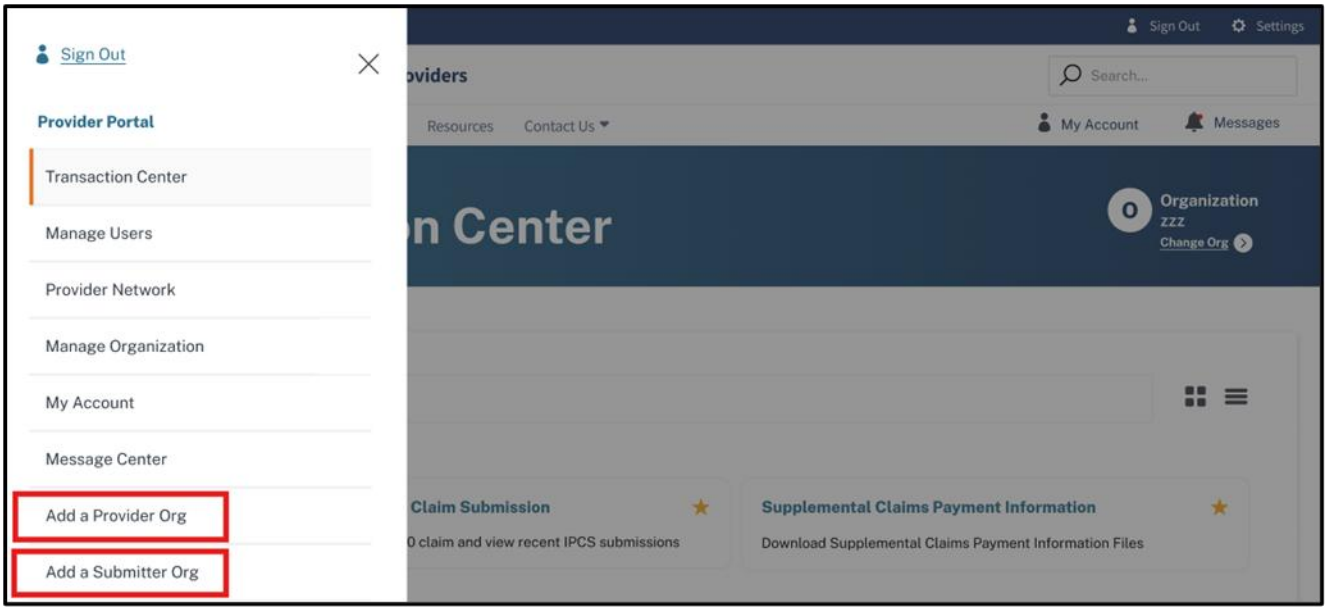

Figure 3.1: Add an Organization.

1. Choose the organization type to add. Select **Request authorization to be a Medi-Cal submitter**.

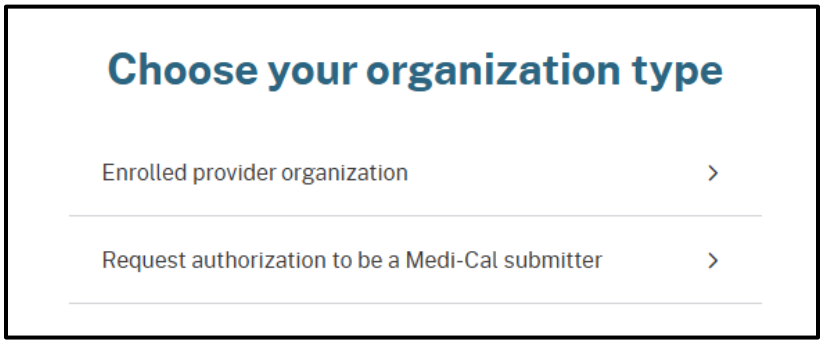

Figure 3.2: Choose Organization Type.

2. Complete the submitter organization information including an affiliated provider. Then select **Next**.

Note: If the organization is already an approved submitter, register the existing account with Medi-Cal. Refer to the Submitter Registration section of this user guide.

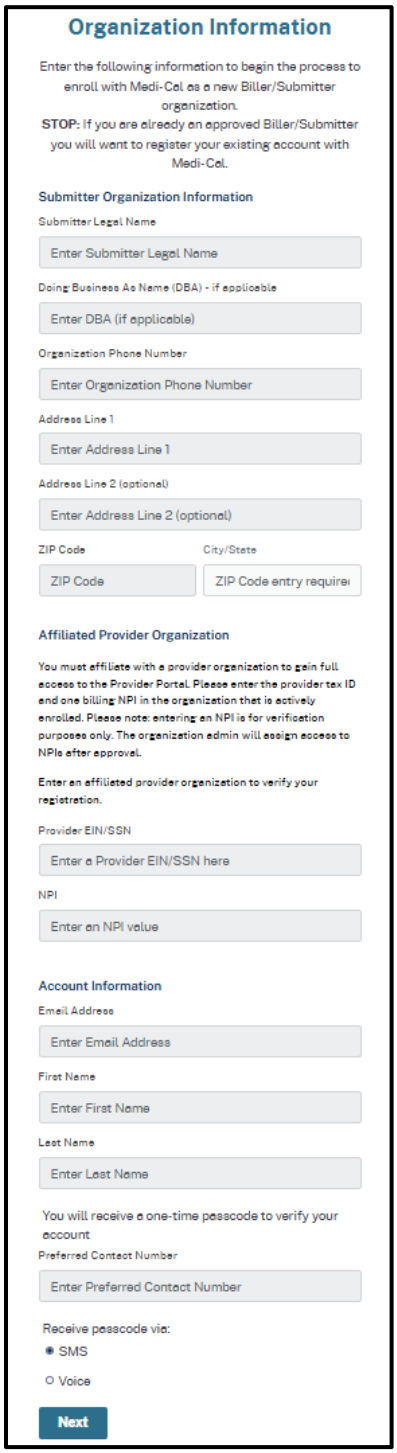

Figure 3.3: Organization Information.

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

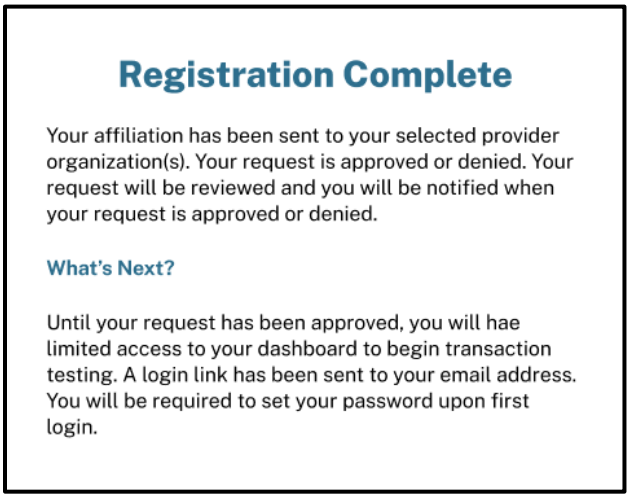

Figure 3.4: Registration Complete.

Add and Manage New Users

The **Administration** area allows for the 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 organization admins.

Add A User

1. To add a new user to an organization, select **Manage Users** in the **Provider Portal menu.**

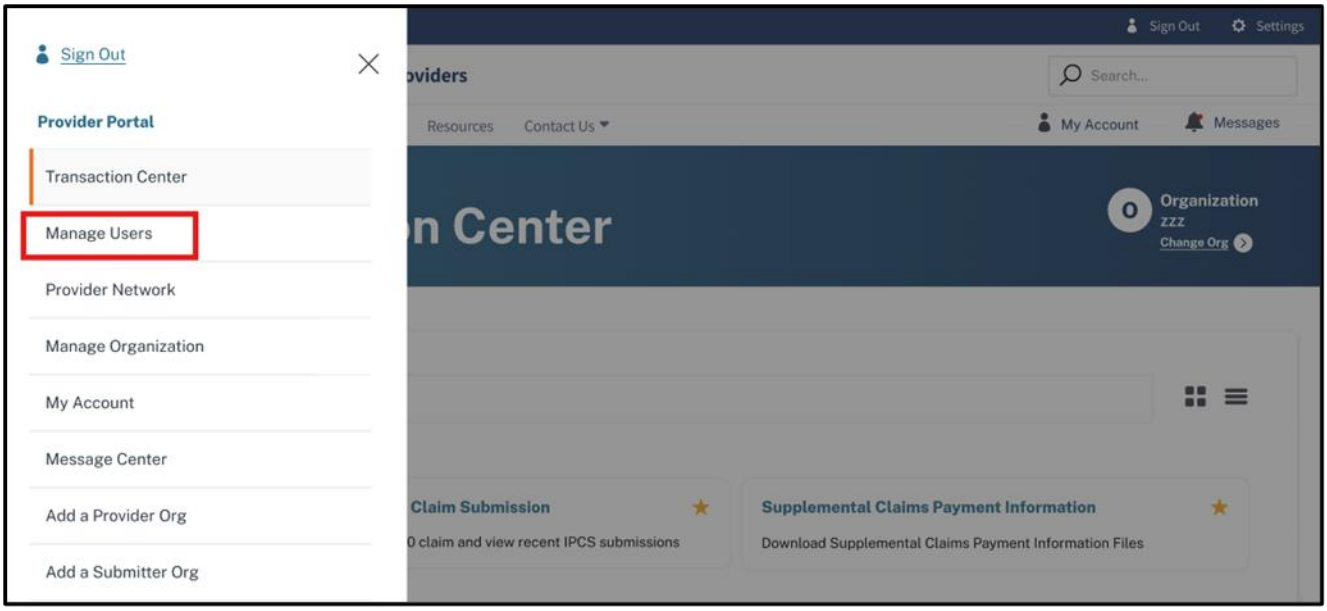

Figure 3.5: Provider Portal Menu.

2 The **Manage Users** screen will display. Select **Add User** to enter the user's information.

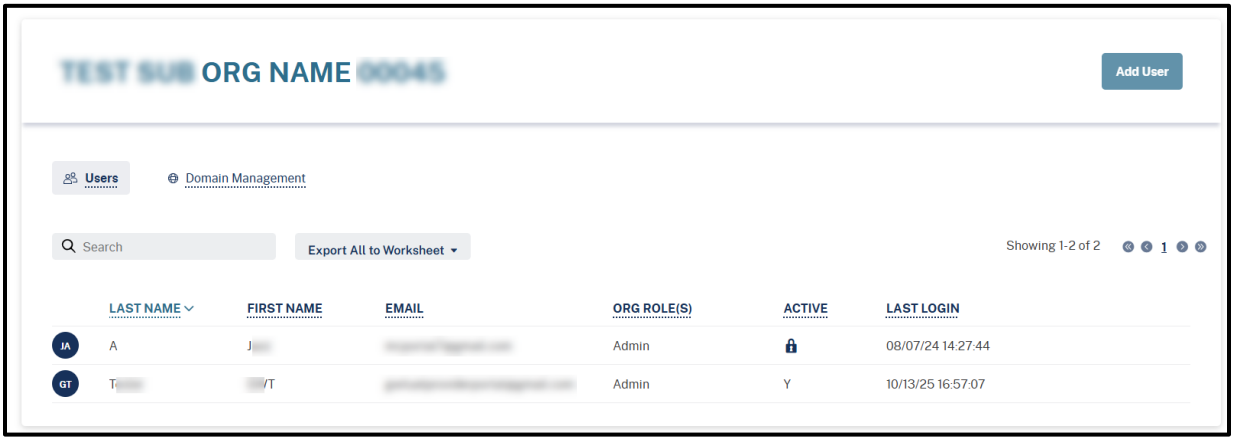

Figure 3.6: Manage Users.

3 The **Add a User** screen will display. Enter the **Email Address**, **First and Last Name**, **Mobile Number** and **Business Number** then select **Next**. If the user only has one phone number, enter the same number for both mobile and business.

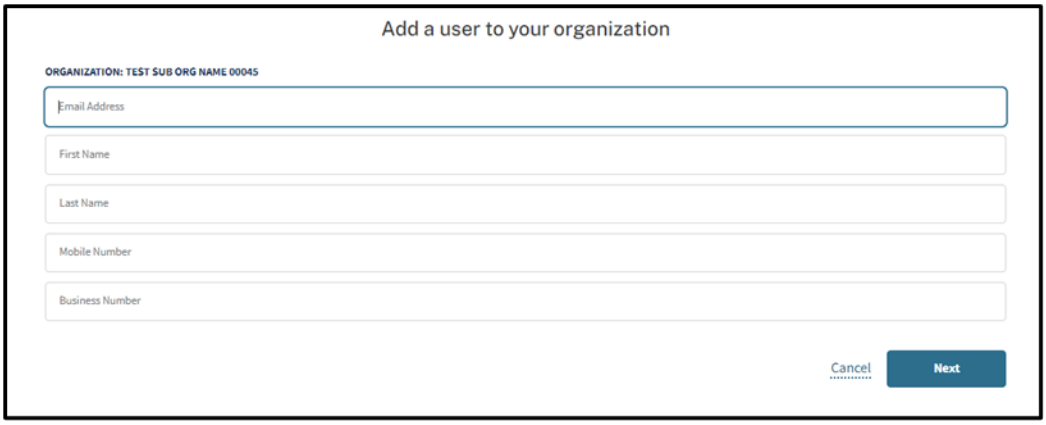

Figure 3.7: Add a User to Your Organization.

Once complete, a screen to assign the user's organization role will appear.

4 Select the Organization Role drop-down menu.

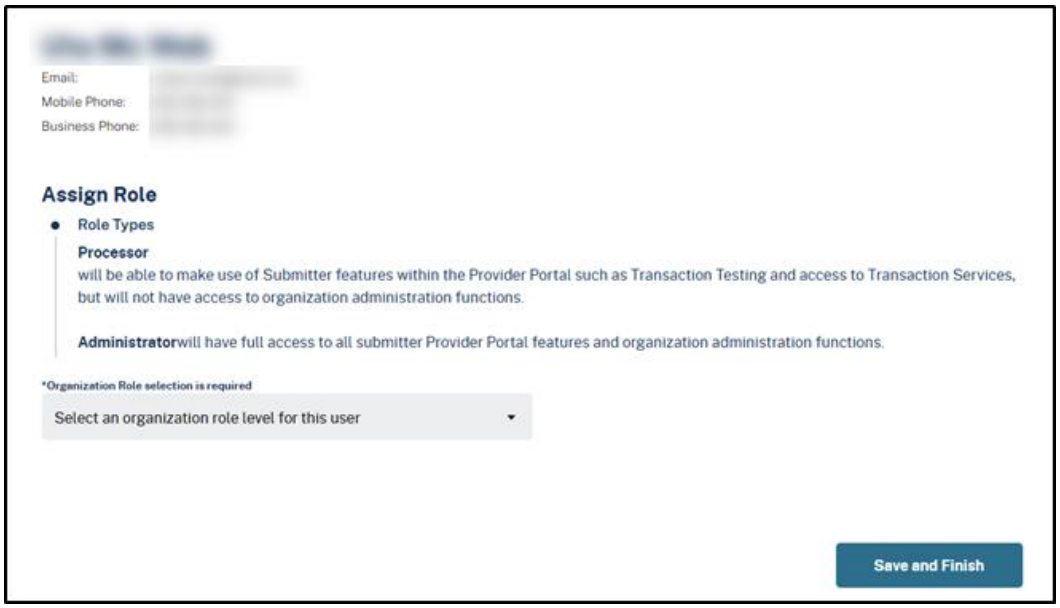

Figure 3.8: Assign Role Page.

5 To assign the role of either **Processor** or **Administrator,** select the organization role type using the drop-down menu under **Assign Role**. Once the role type is selected, select **Save and Finish**.

Figure 3.9: Organization Role Options.

Note: The **Administrator** will have access to all Provider Portal features and organization administration functions. The **Processor** will be able to make use of the submitter features within the Provider Portal such as Transaction Testing and access to the Transaction Center but will not have access to the organization administration functions.

6 Once complete, the **User Management and Permissions** page displays. The new user will be added and they will receive an email to complete their registration.

7 Continue to add users to the organization by selecting the **Add Another User** hyperlink.

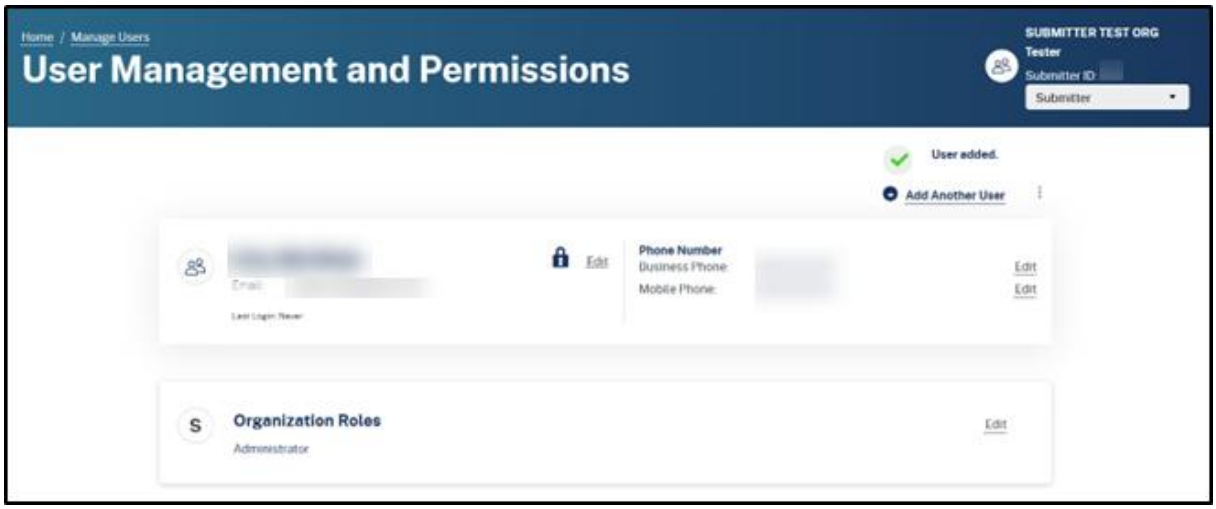

Figure 3.10: User Management and Permissions.

8 The new user and their organization role will be listed under **Users**.

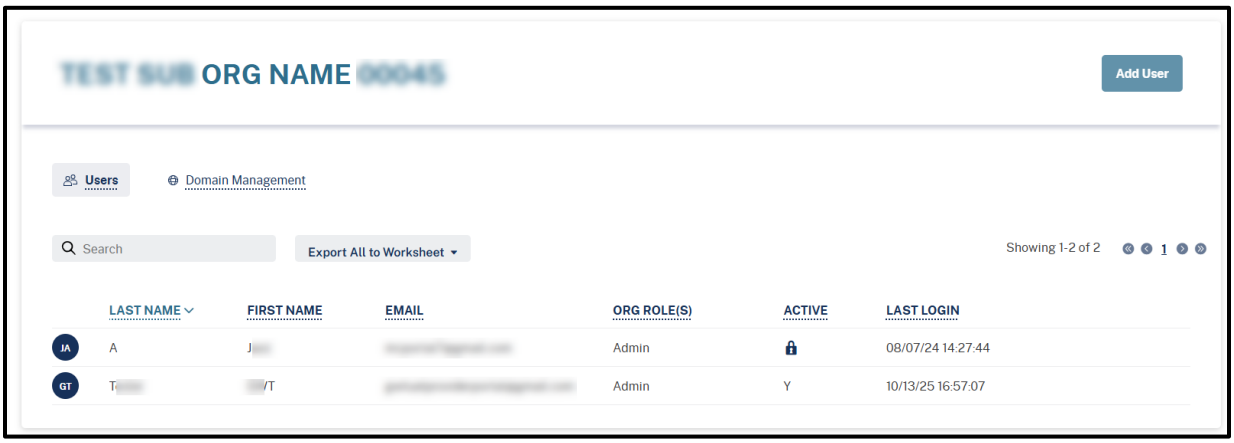

Figure 3.11: Submitter Organization Users.

9 Select the name of the user to reveal the user's contact details and roles.

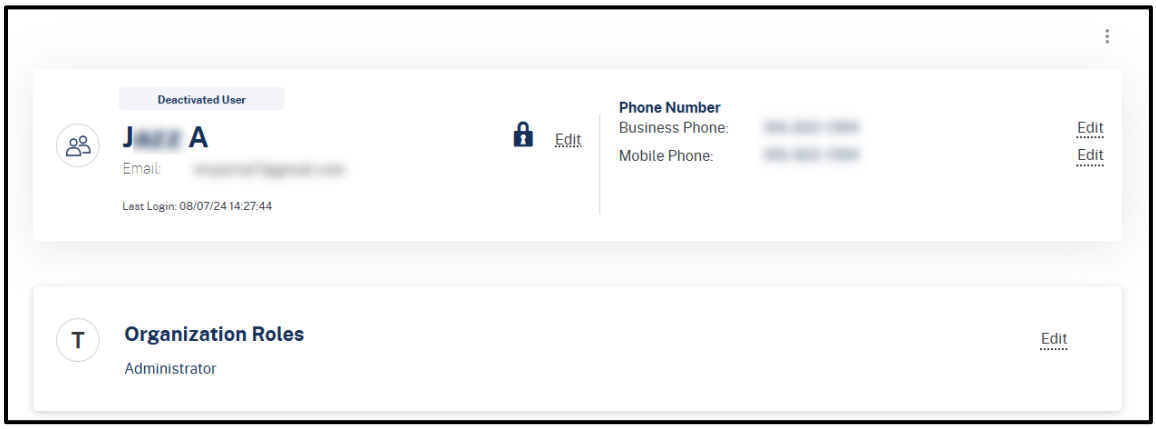

Figure 3.12: Submitter User Details.

Resend Registration Link

1. Select the kebab menu in the far right and select **Resend registration link**.

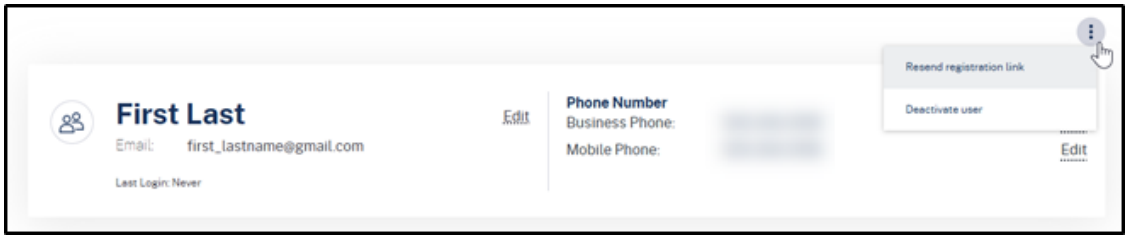

Figure 3.13: Resend Organization Link Menu Option.

A confirmation message appears after the link is sent.

Deactivate User

1. Select the kebab menu in the far right and select **Deactivate User**.

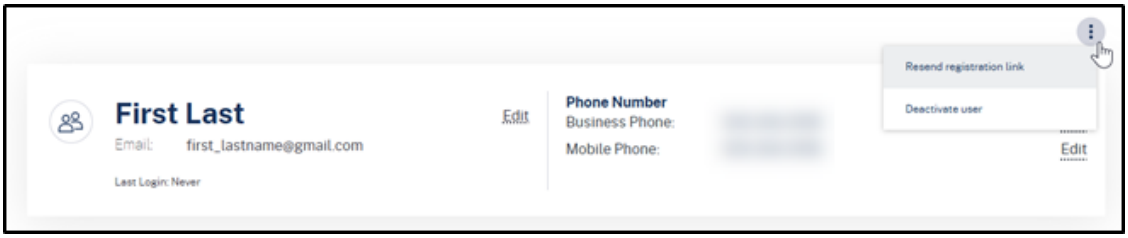

Figure 3.14: Deactivate User Menu Option.

2. A screen will appear asking for confirmation to deactivate the user. Select **Confirm**.

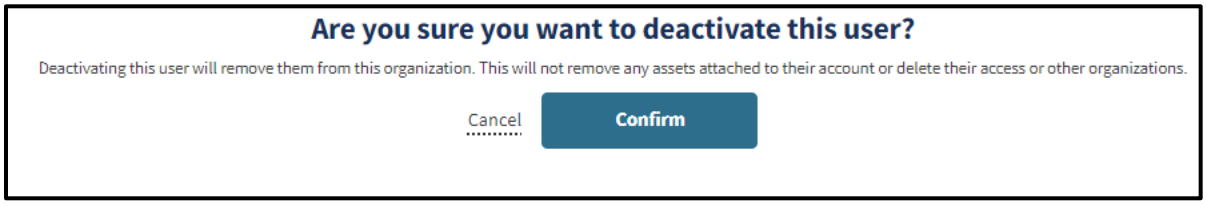

Figure 3.15: Deactivate User Confirmation.

Once complete, a successfully deactivated notification will appear within the **User Management and Permissions** profile of the user.

Reactivate User

1. Select the kebab menu in the far right and select **Reactivate User**.

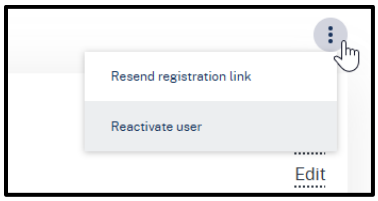

Figure 3.16: Reactivate User Menu Option.

2. A screen will appear asking for confirmation to reactivate the user. Select **Confirm**.

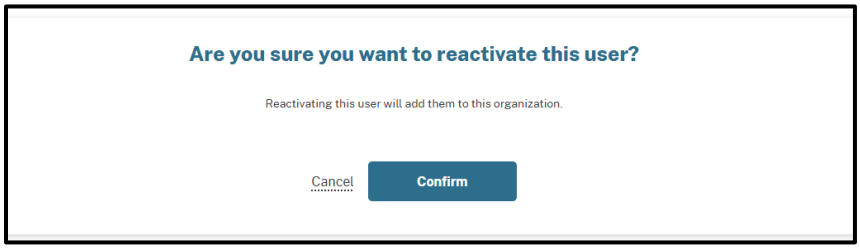

Figure 3.17: Reactivation Confirmation.

Unlock Account

A user account will become locked if it is inactive in the Provider Portal for more than 180 days. Users should log in at least once a month to prevent their account from being locked. To unlock and reactive the account, contact the organization administrator or TSC. Passwords will remain locked until the password reset email is received and the password is updated.

1. Within the **Manage Users** webpage the accounts that are locked have the lock symbol (🔒) in the Active column.

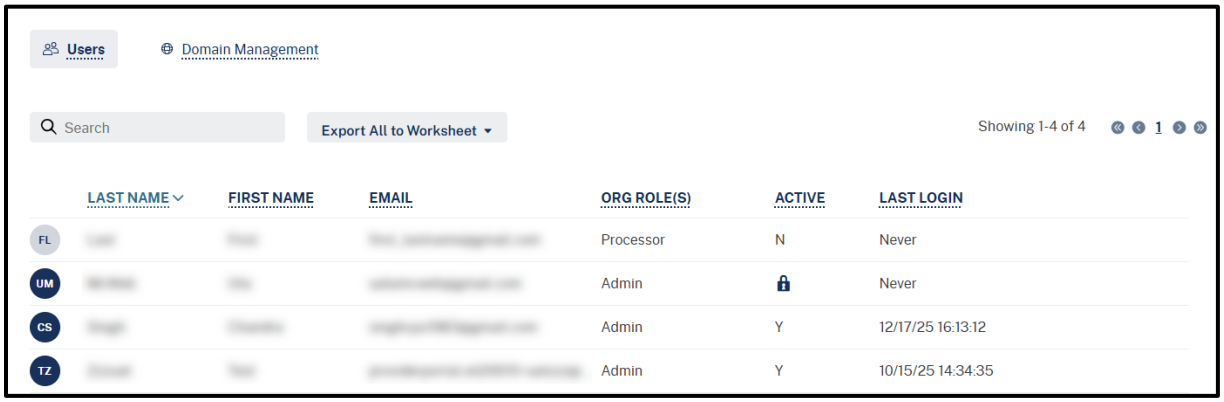

Figure 3.18: User Management Table.

2. Select the account that needs to be unlocked. A **Deactivated User** label appears above the user's name. Within the user's account section, select the kebab menu at the right corner and select **Unlock User Account**.

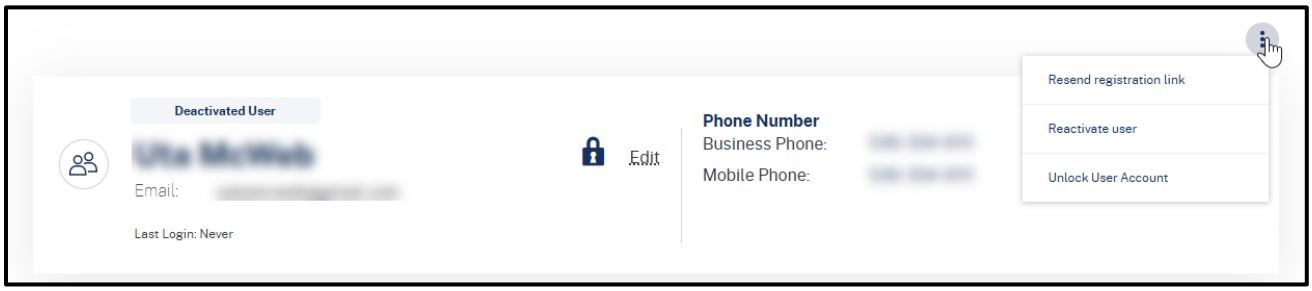

Figure 3.19: Unlock User Account Menu Option.

3. A pop-up screen will appear. Select **Unlock User Account** to proceed.

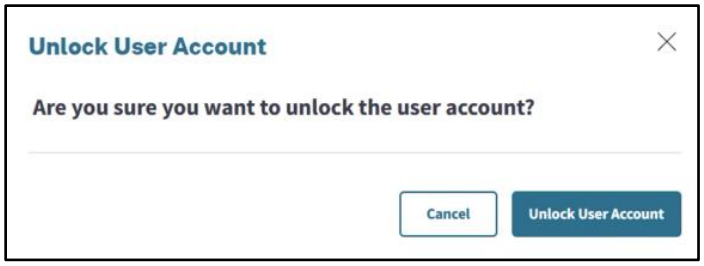

Figure 3.20: Unlock User Account.

4. Once complete, the user account will successfully be unlocked, and the user will receive an email to reset their password.

Reset a Forgotten Password

If the user forgets their password and needs to reset it, they may reset it by doing the following:

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

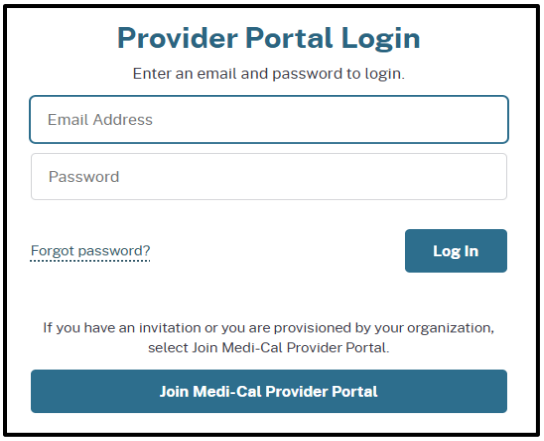

Figure 3.21: Provider Portal Login.

2. A **Resend Reset Password Link** screen will appear. Enter the appropriate email address and select **Reset Password**.

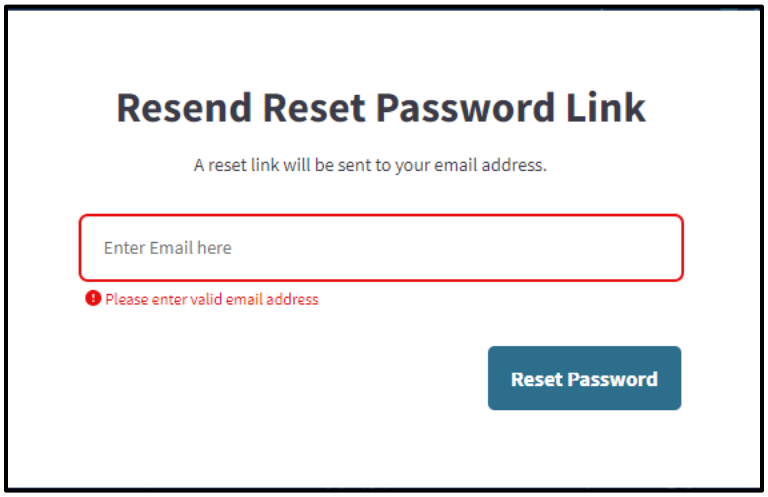

Figure 3.22: Resend Reset Password Link.

3. A notification will appear stating an email has been sent to reset password.

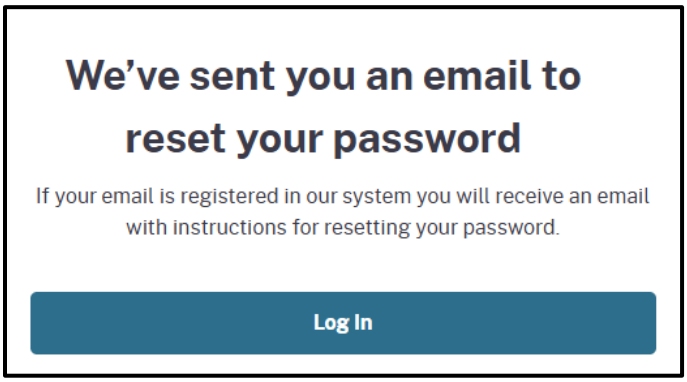

Figure 3.23: Notification of Email Sent to Reset Password.

4. A link to reset the password will be sent via email. Select **Set Password**.

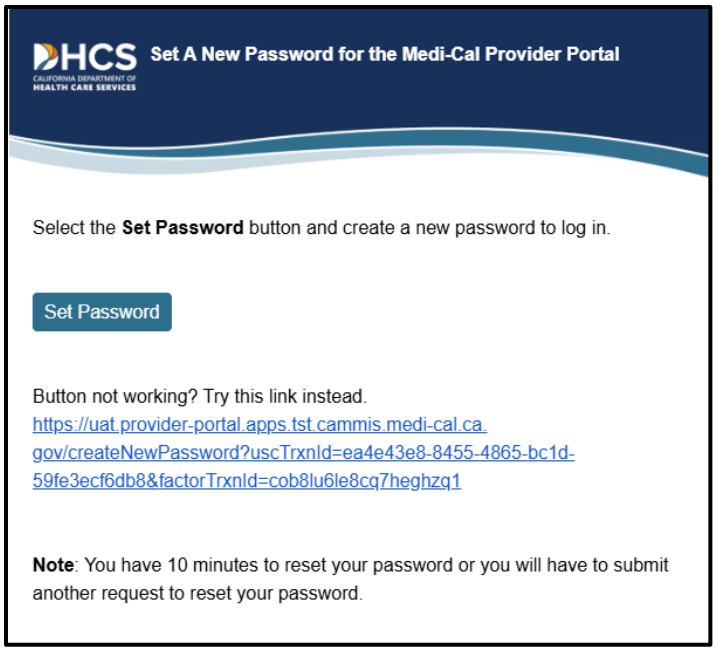

Figure 3.24 Set New Password Email Notification.

5. Select 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**.
6. After selecting the **Set Password** button, a screen to receive an OTP will appear. Refer to the One-Time Passcode section of this user guide for details about using security measures when registering an account.
7. The **Create New Medi-Cal Password** page displays and the user can enter a new password and select **Submit**. A confirmation screen appears, and the password is updated.

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

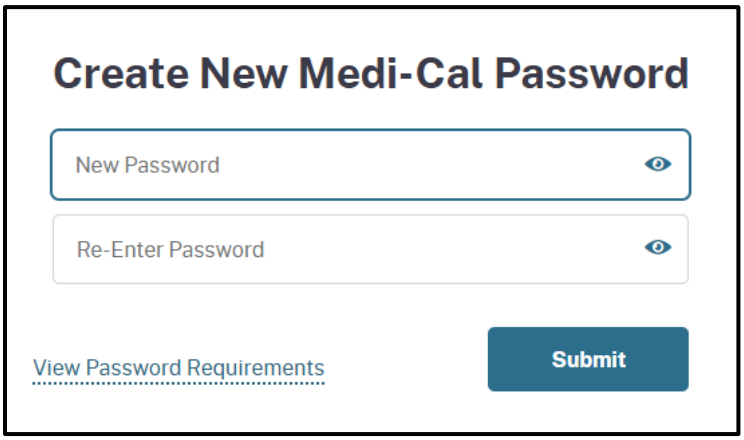

Figure 3.25: Create New Medi-Cal Password.

Transaction Testing

The **Transaction Testing** area allows users to submit transaction testing for Claims 837 and Eligibility Benefit 270/271 transactions. The user can also view the status of each **Transaction Type** and the Date of Completion. The status of each Transaction Type will report as Not Started, Pending or Active. Refer to the Medi-Cal Electronic Data Interchange (EDI) User Guide for detailed information on transaction testing including preparing for test transactions.

1. From the **Transaction Center** under **EDI Transactions**, select **Transaction Testing** to enter the **Submission Management** page.

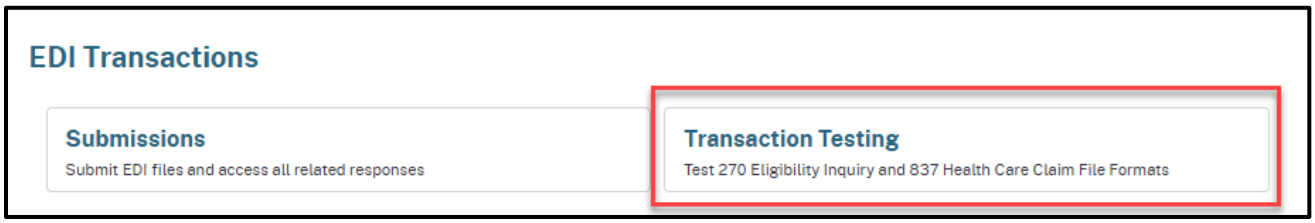

Figure 4.1: Transaction Testing Link.

Provider Network

The Provider Organizations that submitters are affiliated with are viewable in **Provider Network** in the **Provider Portal menu**. This area may only be accessed by individuals who are designated as organization admins.

Administrators can view **Pending Requests, Affiliations, Submitter Directory Profile** and request a new affiliation.

1. Select **Provider Network** to see all provider affiliations and requests

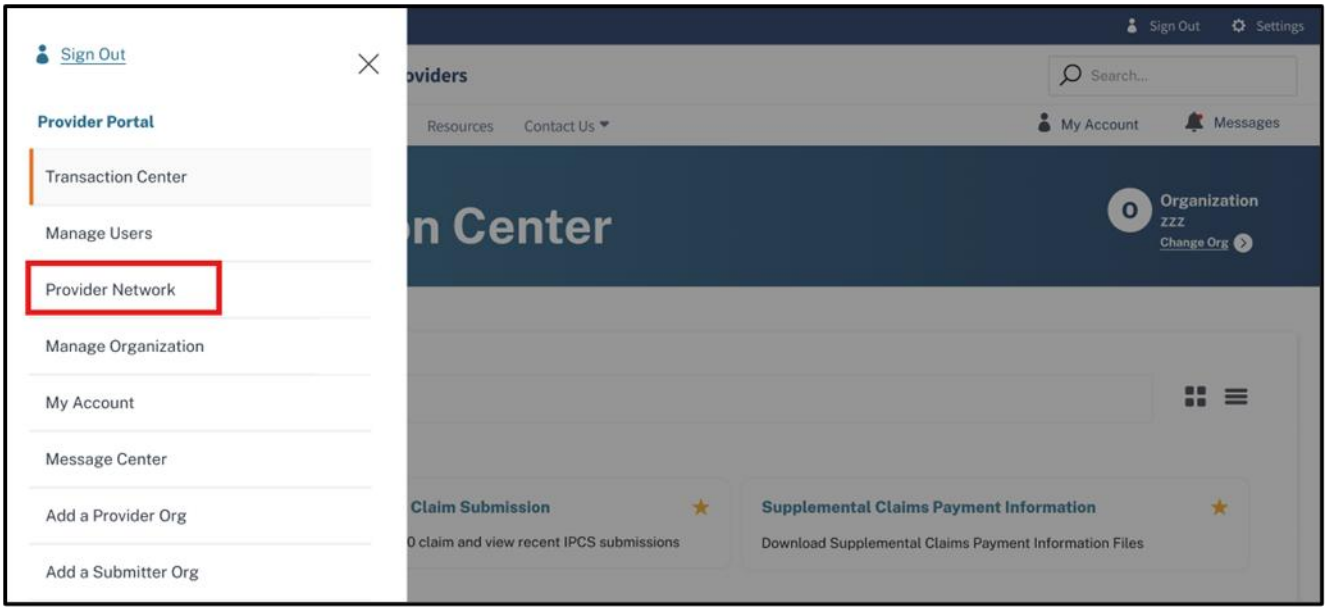

Figure 5.1: Provider Network Tile.

2. The **Pending Requests** tab displays the organizations where the status for affiliation is either Request Pending, Pending Approval or Expired. Affiliation requests are valid for 60 days and once they have expired the submitter organization can select **Re-Submit Request** to resend the affiliation request.

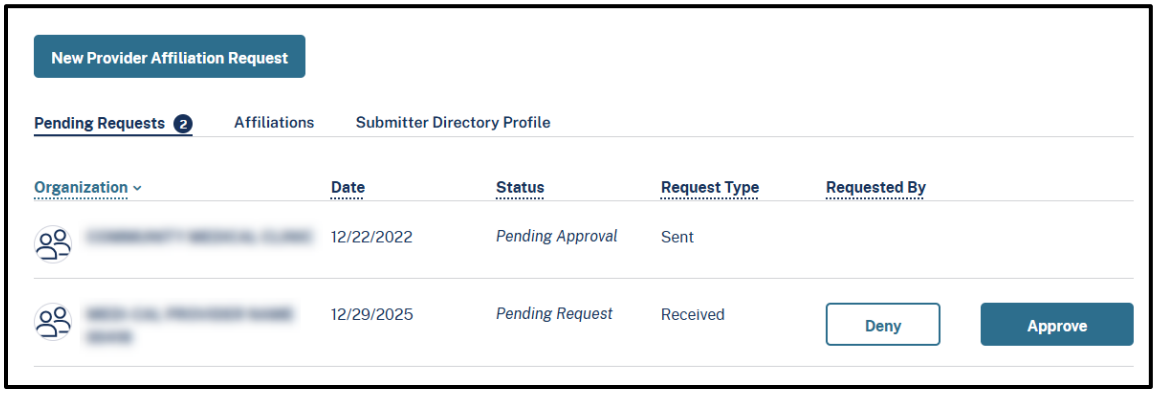

Figure 5.2: Pending Requests.

3. The **Affiliations** tab displays organizations where the status of the affiliation is Active or Inactive.

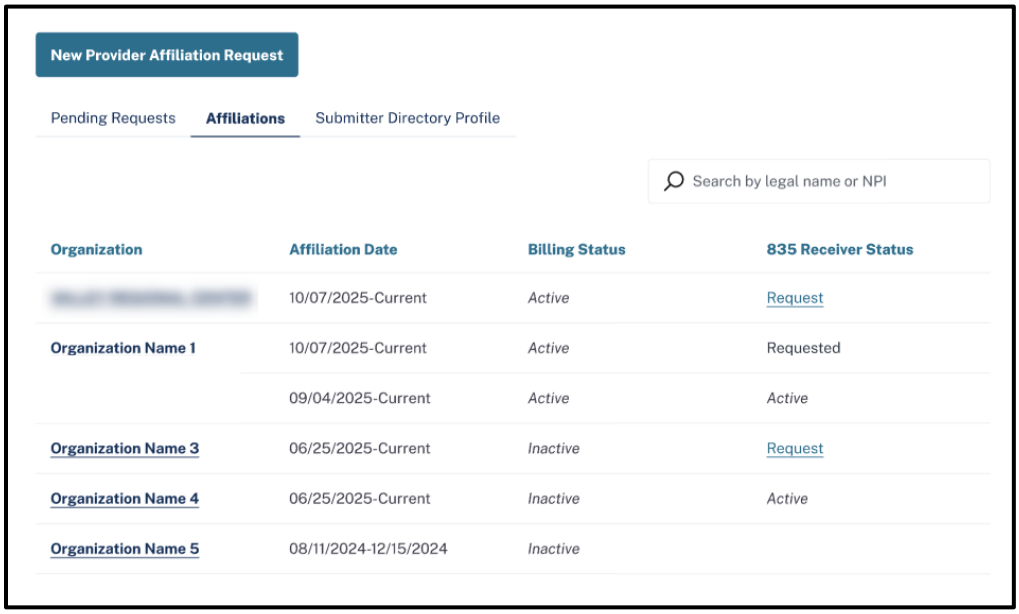

Figure 5.3: Affiliations.

4. The **Submitter Directory Profile** tab displays submitter ID, transaction types and contact information.

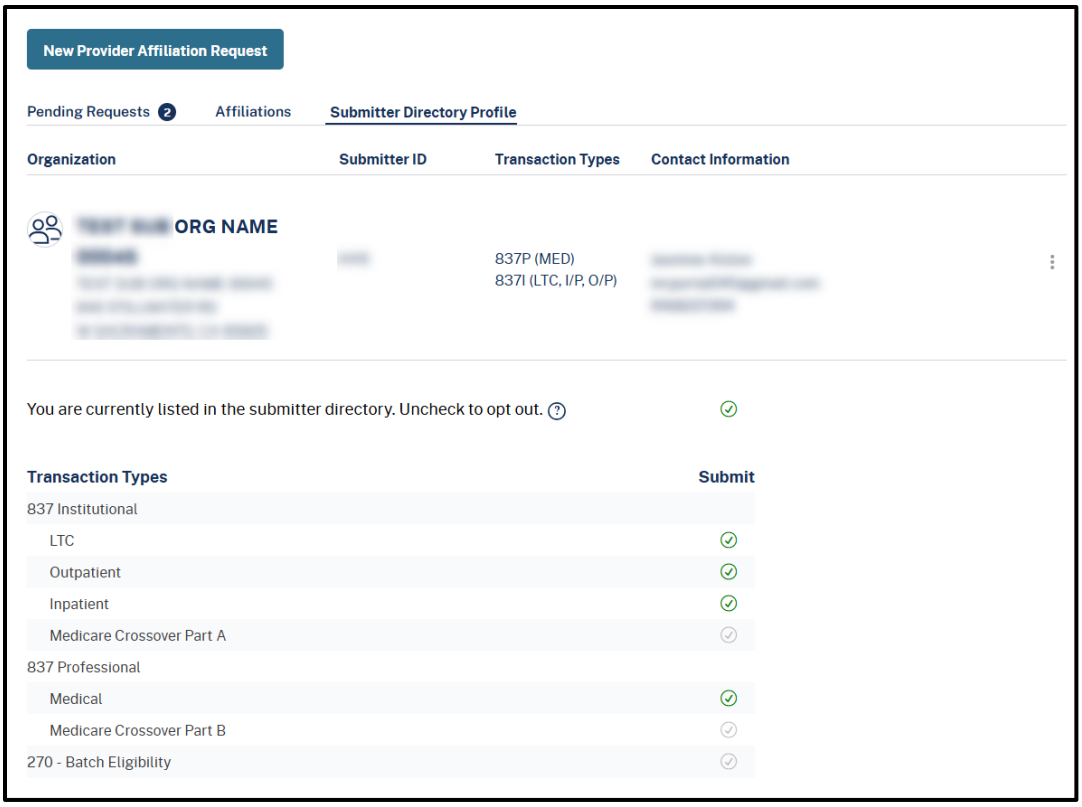

Figure 5.4: Submitter Directory Profile.

Note A green check mark ( ) will indicate that a submitter organization is listed in the submitter directory. To opt-out, view Edit Submitter Directory Information.

5. Submitter information including organization contact and Submitter Directory listing can be edited outside the Provider Network page, by selecting the kebab menu to access the **Edit my Information** option.

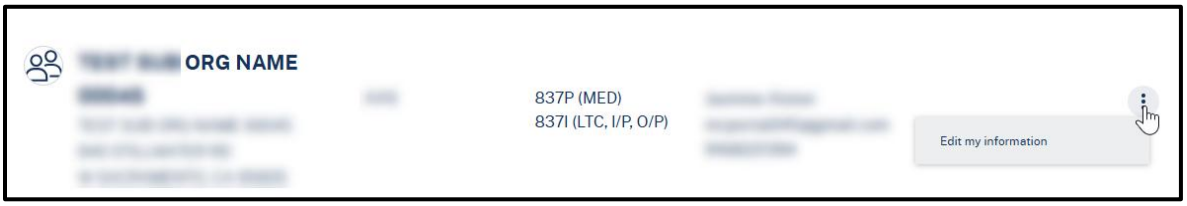

Figure 5.5: Edit Submitter Information.

6. The **Manage Organization** page is where submitter information can be edited. Select the **Edit** hyperlink to make appropriate changes.

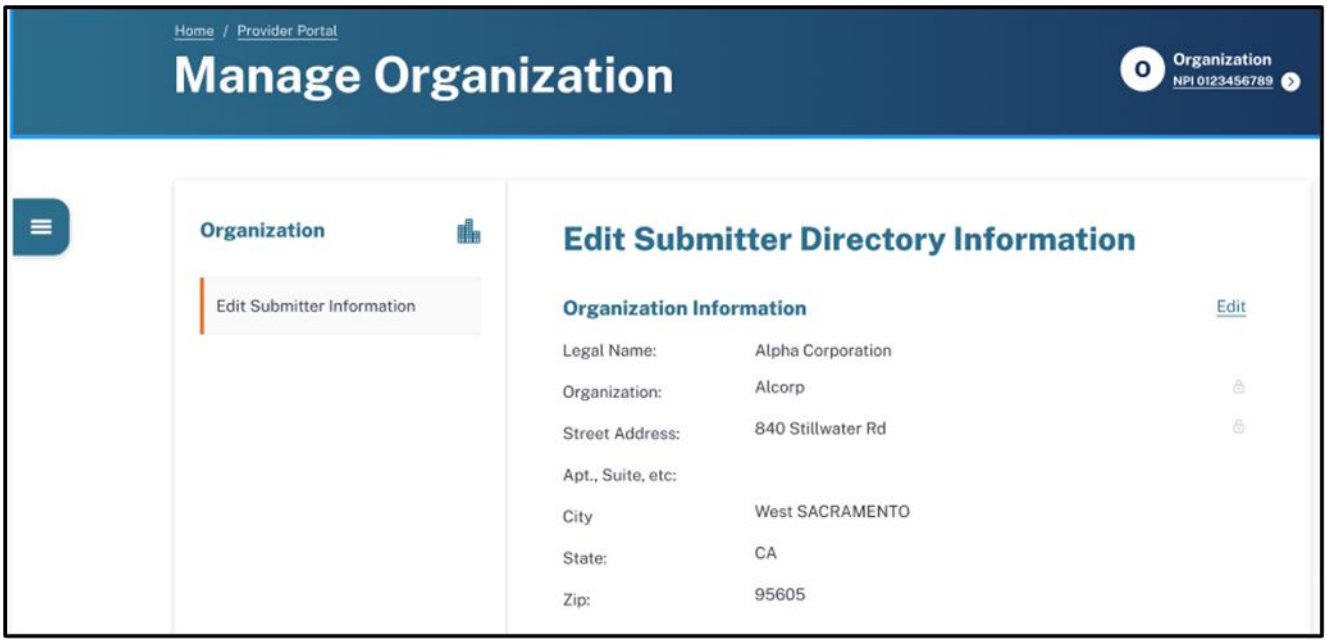

Figure 5.6: Manage Organization.

Pending Affiliation Requests

Any pending affiliation requests are visible in the Pending Requests tab. Details include the **Organization Name**, **Date** of affiliation, **Status**, **Request Type** and name **Requested By**. This information helps submitters track if further action needs to be taken to complete the affiliation. If there are no pending requests the table is blank.

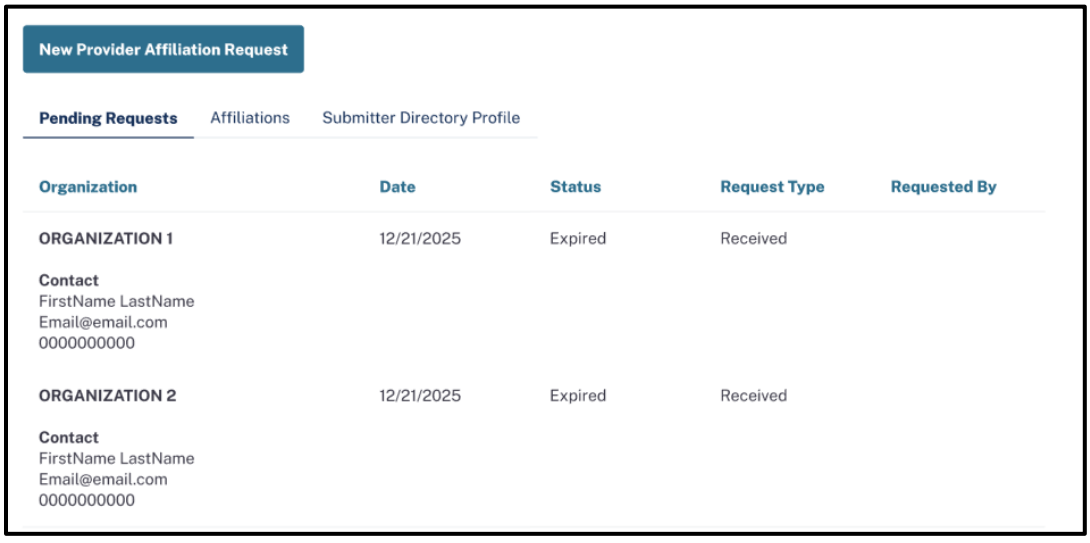

Figure 5.7: Pending Requests Tab.

New Provider Affiliation Request

1. To request a new provider affiliation, select **New Provider Affiliation Request** within **Provider Network**.

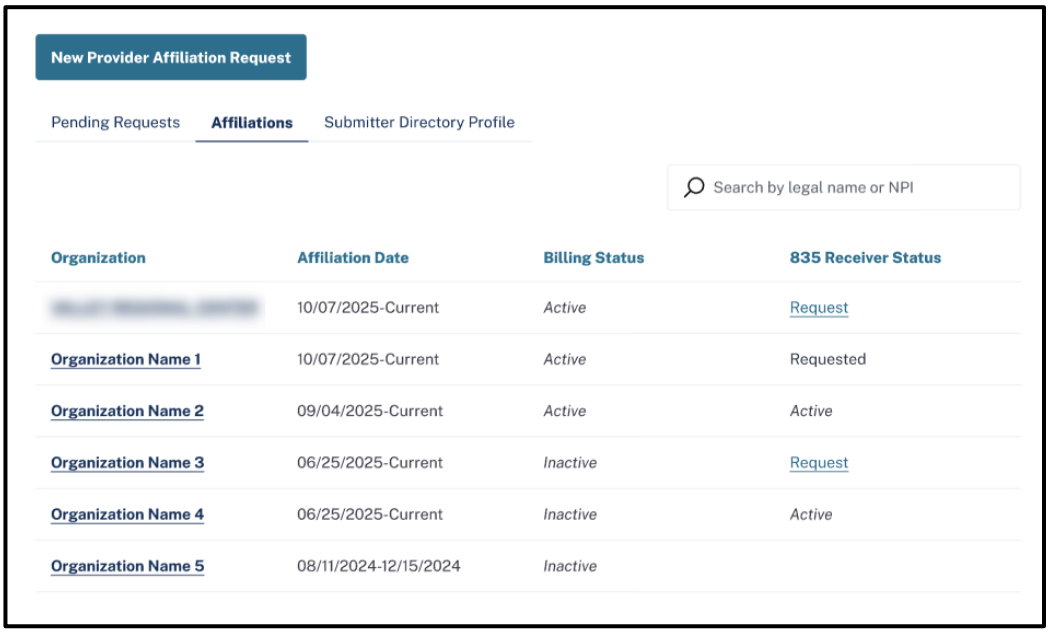

Figure 5.8: Affiliations Tab.

2. The **Organization Information** screen will appear. Enter the **Provider Tax ID** or **SSN** and the provider's **NPI**, then select **Next**.

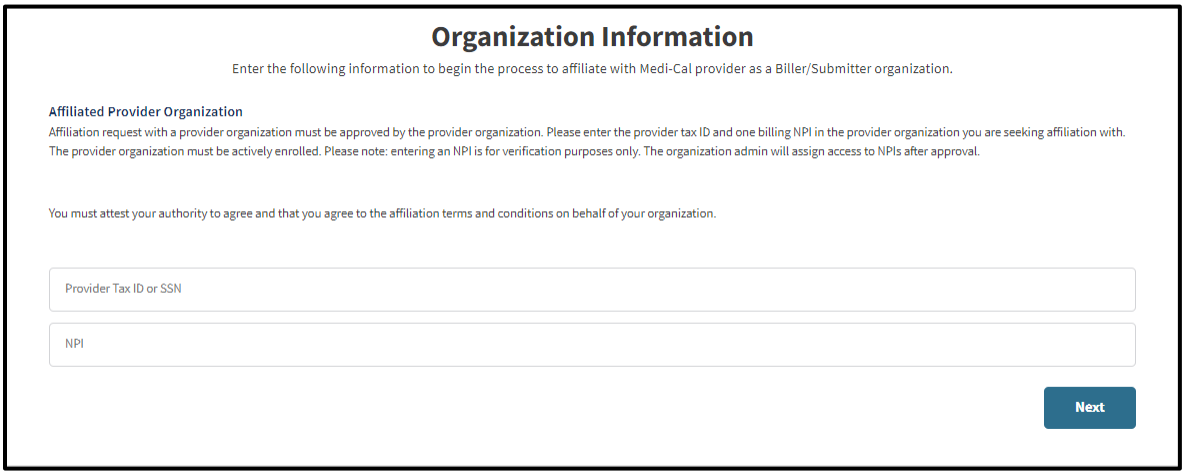

Figure 5.9: Affiliation Provider Organization Information.

The **DHCS 6153** form screen will appear.

3. Read the agreement form, check the confirmation box and then sign with First and Last name along with Title. Once complete, select **Submit Agreement**.

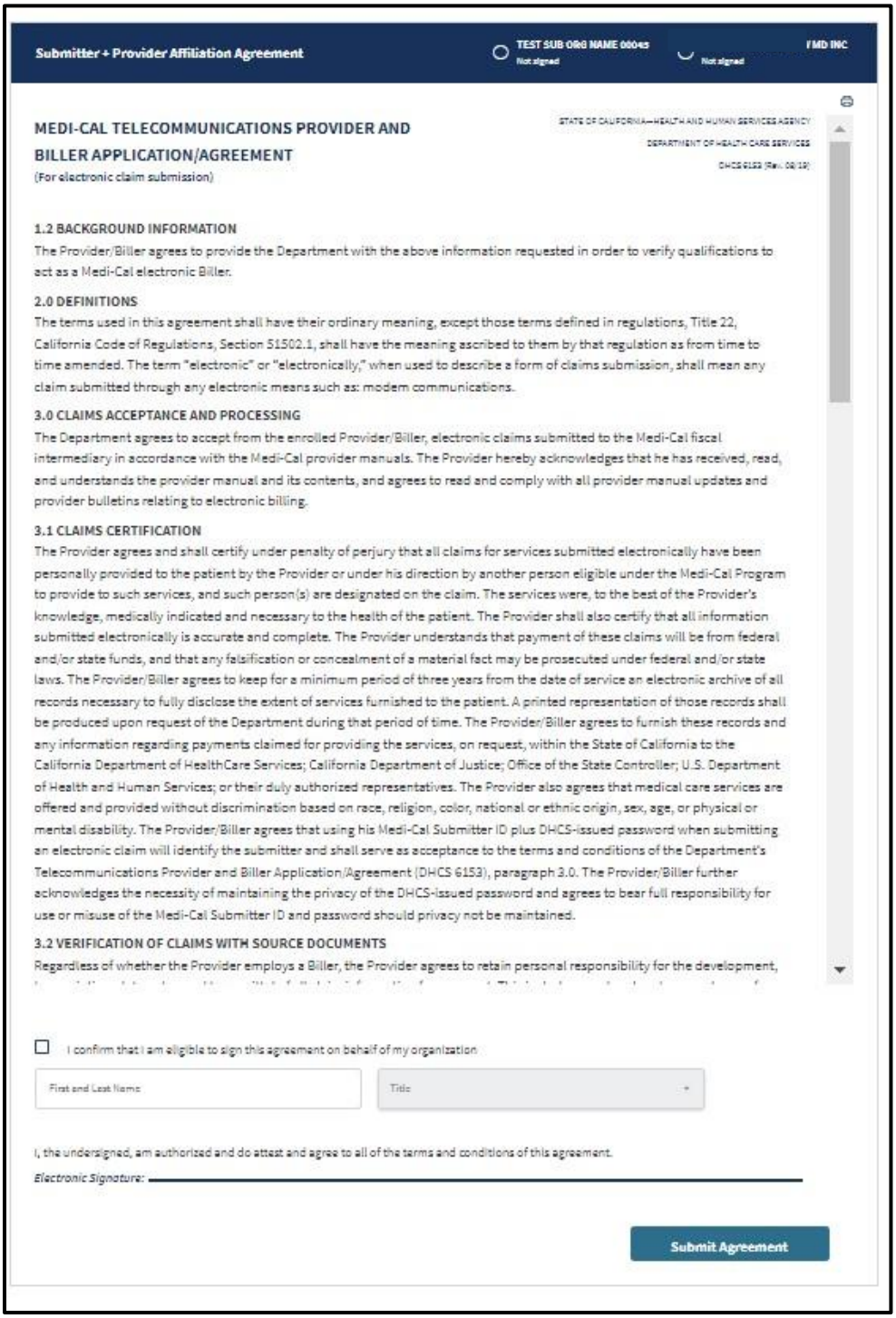

Figure 5.10: Medi-Cal Telecommunications Provider and Biller Application/Agreement.

The **Request Complete** screen will appear.

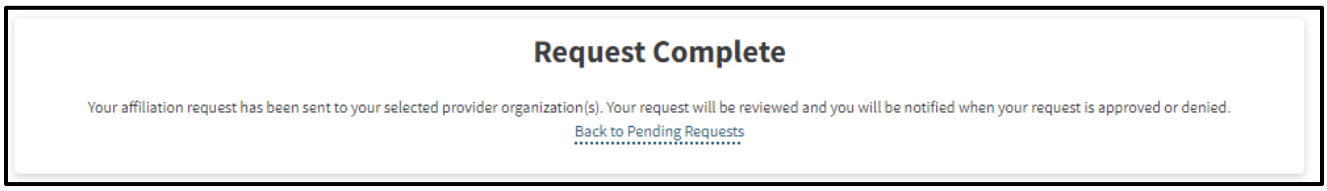

Figure 5.11: Request Complete.

Approve Provider Affiliation Request

1. Under the Pending Requests, select **Approve** for the desired provider organization affiliation request.

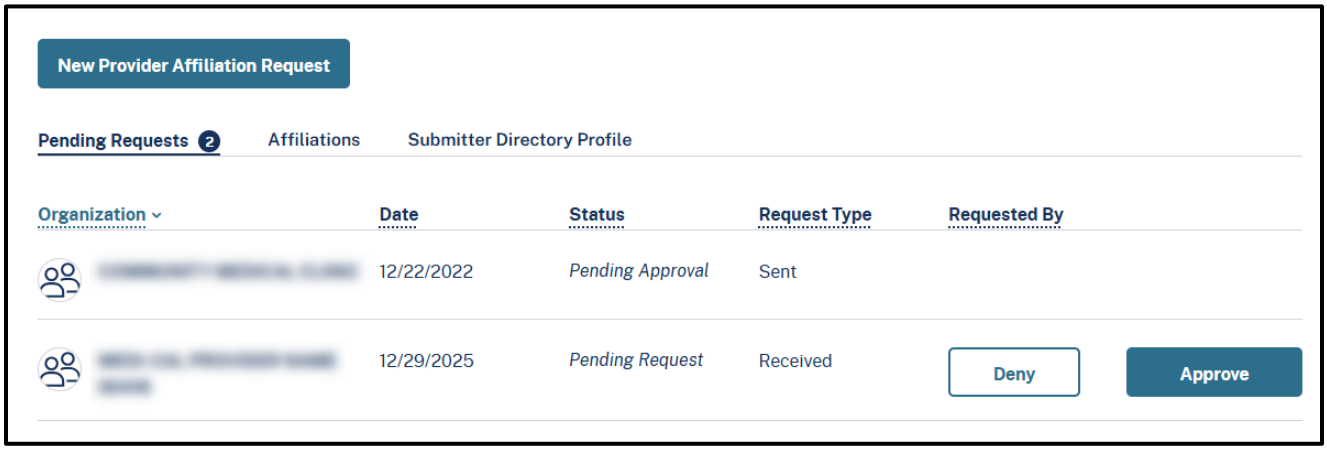

Figure 5.12: Pending Requests.

2. As executed in the New Provider Affiliation request, the DHCS 6153 form will appear. Read the agreement form and then sign with First and Last name along with the providers Title. Once complete, select **Submit Agreement**.

3. Once complete, the **Approval Complete** screen will appear. Select **Return to Provider Network** to view active affiliations.

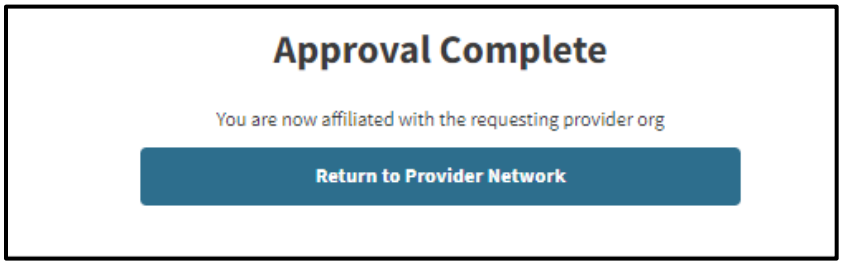

Figure 5.13: Approval Complete Confirmation.

Note: Once an affiliation is approved, the provider organization can select the medical claim type for the submitter organization prompting automatic enrollment in Internet Professional Claim Submission (IPCS).

Deny Provider Affiliation Request

1. Under the Pending Requests, select **Approve** for the desired provider organization affiliation request.

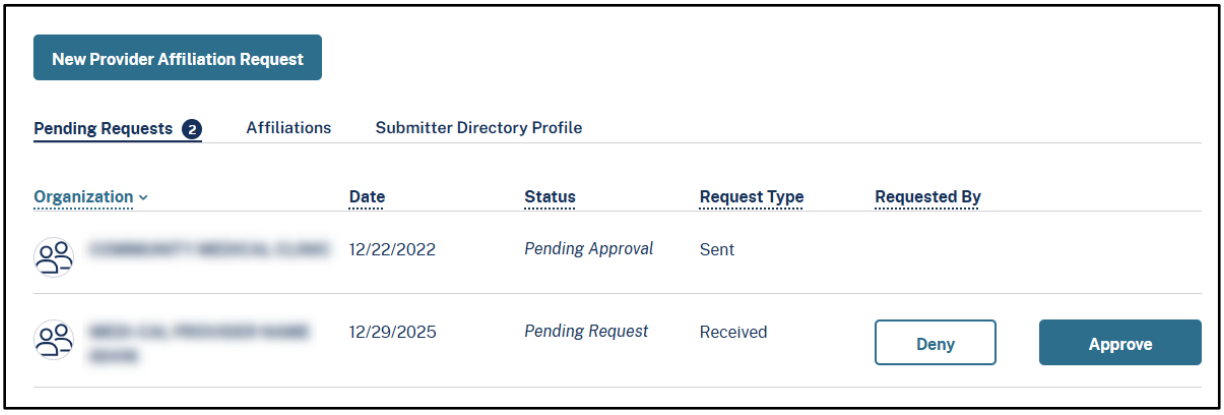

Figure 5.14: Pending Requests.

2. A pop-up screen asking for confirmation to deny request will appear. Select **Deny** to continue.

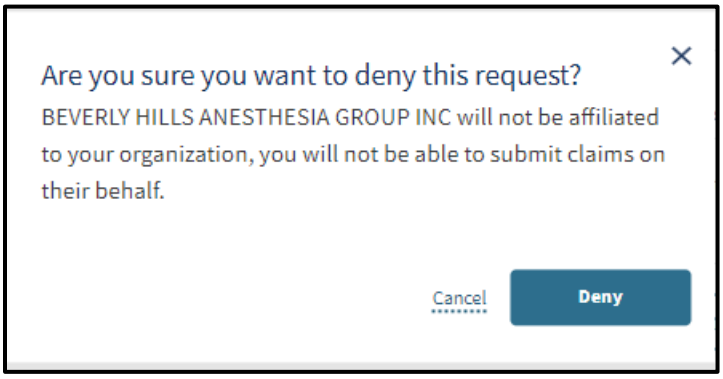

Figure 5.15: Deny Request Confirmation.

Once complete, a successfully denied notification will appear within the **Provider Network** webpage.

Remove Provider Affiliation

1. To remove a provider affiliation from the **Provider Network**, select the desired Provider Organization listed under Affiliations.

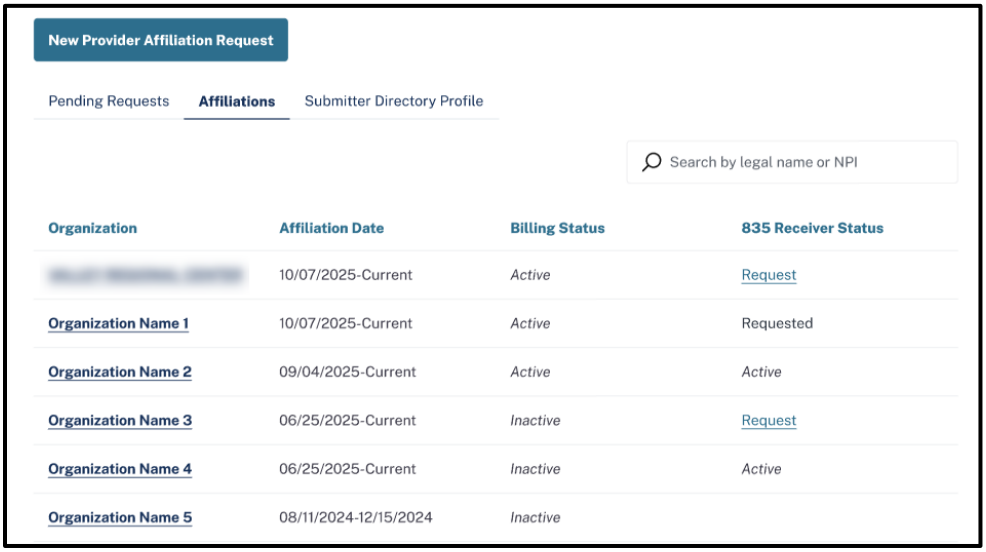

Figure 5.16: Affiliations List.

2. The provider organization's profile will appear within the **Provider Network**.

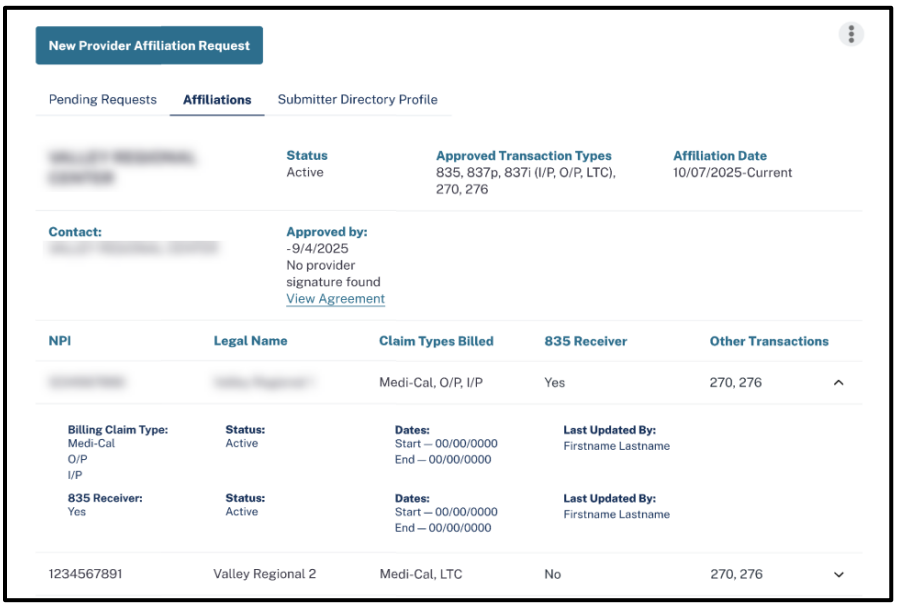

Figure 5.17: Affiliated Provider Organization Profile.

Select the kebab (⋮) menu in the top right-hand corner and then select Remove affiliation from organization.

Figure 5.18: Remove Affiliation from Organization.

3 A screen will appear to confirm the removal of the affiliation. Type the organization's name in the field below to verify and select **Confirm**.

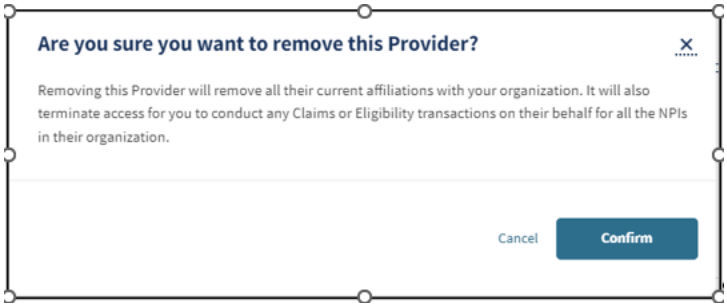

Figure 5.19: Remove Affiliation.

A notification stating, Affiliation removed successfully, will appear within **Provider Network** webpage and the status of the organization will read Inactive.

Medi-Cal 835 Receiver

Submitter organizations can request to receive the 835 from an affiliated NPI, view status of an existing request and view claim level details of the NPI if they are registered in the Medi-Cal Provider Portal. Refer to the Submitter Registration section of this user guide for registration details.

1. Select **Provider Network** from **Provider Portal menu.**

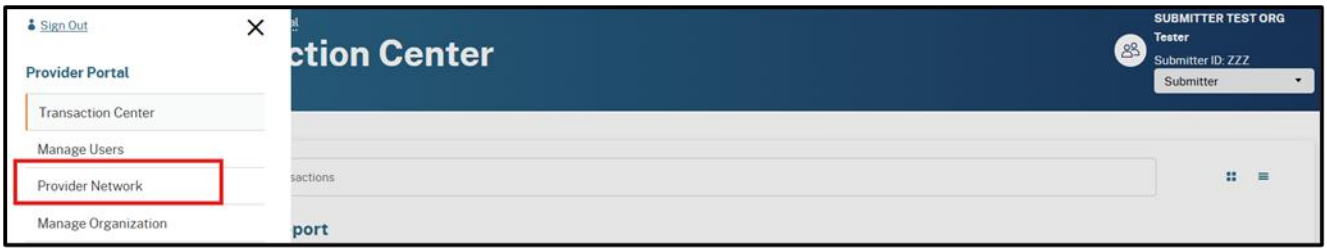

Figure 6.1: Access Submitter's Provider Network.

Make an 835 Receiver Request

Current affiliated provider organizations are listed under the Affiliations tab. Refer to the New Provider Affiliation Request section of this user guide if a provider is not listed and should be added.

1. In the Affiliations tab on the Provider Network page select the **Request** hyperlink under the 835 Receiver Status column to send the 835 receiver request to the provider organization.

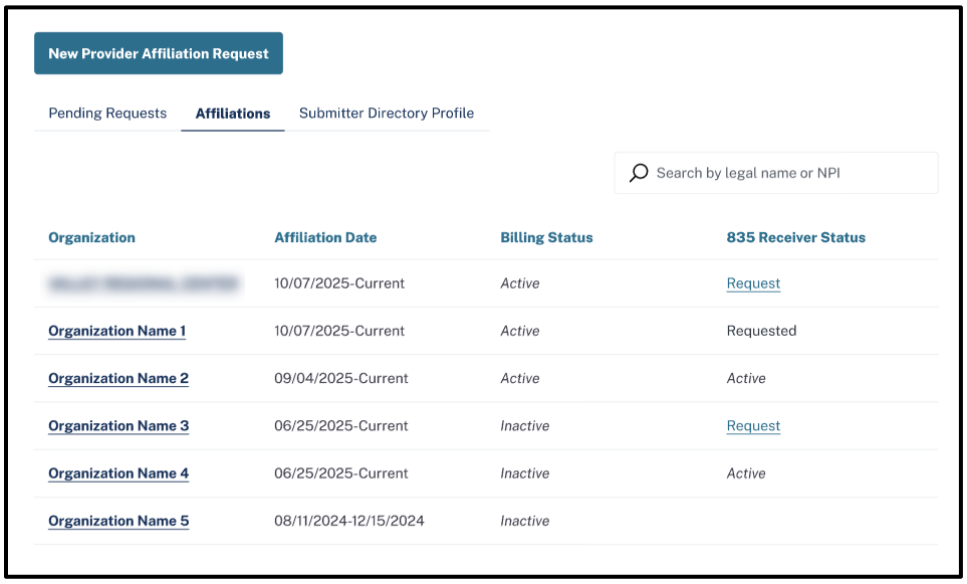

Figure 6.2: Affiliated Organizations Table.

2. Enter the provider's Taxpayer ID Number and NPI information in the Medi-Cal Provider Portal to validate the request, then select **Submit Request.**

Note: In the provider organization, each NPI can assign up to two 835 receivers and may assign them once they process the request.

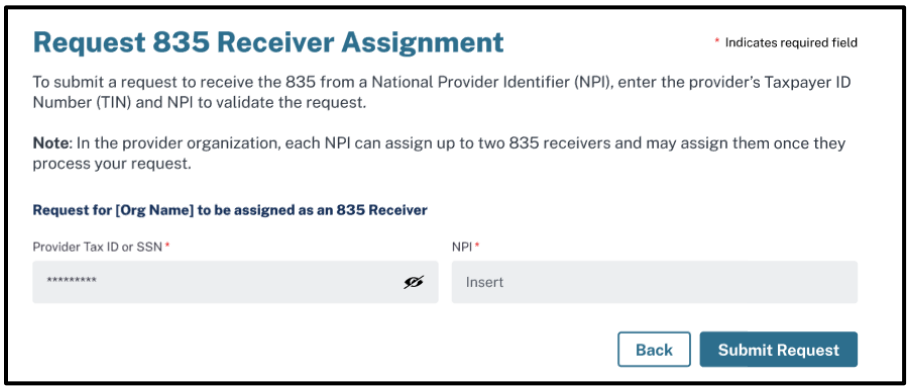

Figure 6.3: Access Submitter's Provider Network.

Once the organization has processed the request, the submitter will receive an email approving or denying the request.

Check 835 Request Status

Submitter organizations designated to be an 835 receiver will receive a notification within the Provider Portal after being added by an organization. The status types of the request are found in the 835 Receiver Status column of the Affiliations table. The applicable states are **Request**, **Requested** or **Active**.

1. Select an organization name to view that organization's details

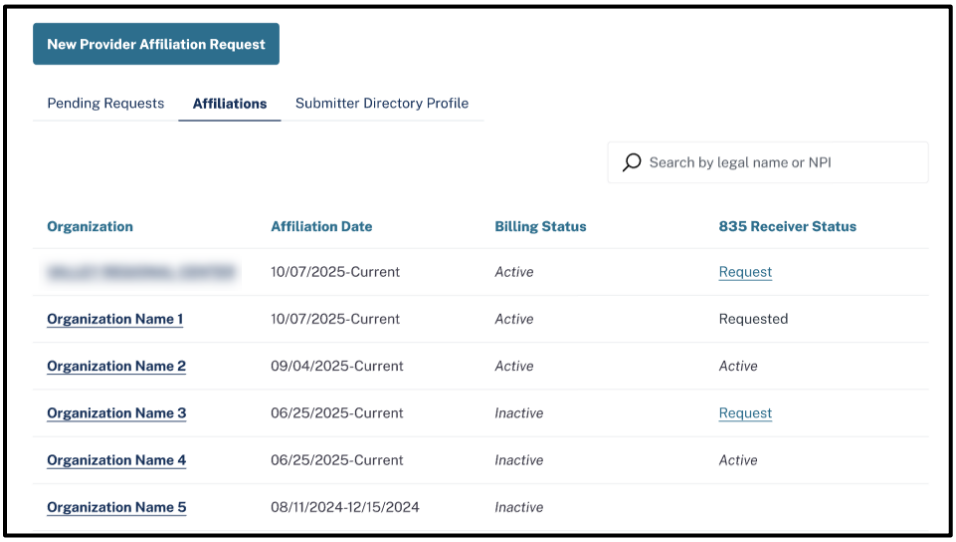

Figure 6.4: Affiliations Tab.

The organization details page provides submitters with information pertaining to the types of transactions, the affiliation date, the contact person and when the affiliation was approved.

2. Select the **View Agreement** hyperlink to download the Affiliation Agreement.

Note: If there is more than one NPI associated with the organization, each NPI can be expanded to show claim-level details.

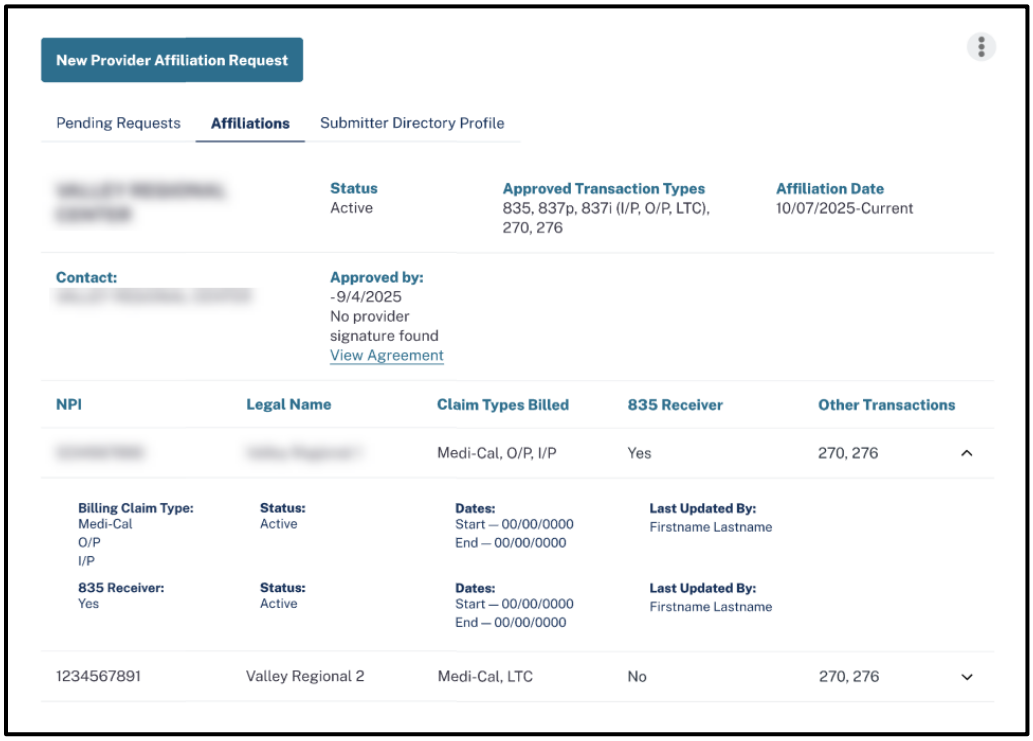

Figure 6.5: Affiliated Organization Details.

My Account

The **My Account** page gives users the ability to set or update their preferences by using the left navigation panel. This area allows users to modify account information, such as business or cell phone numbers.

1. Select the **My Account** tab from any page in the Provider Portal.

Figure 7.1: Edit Account Information.

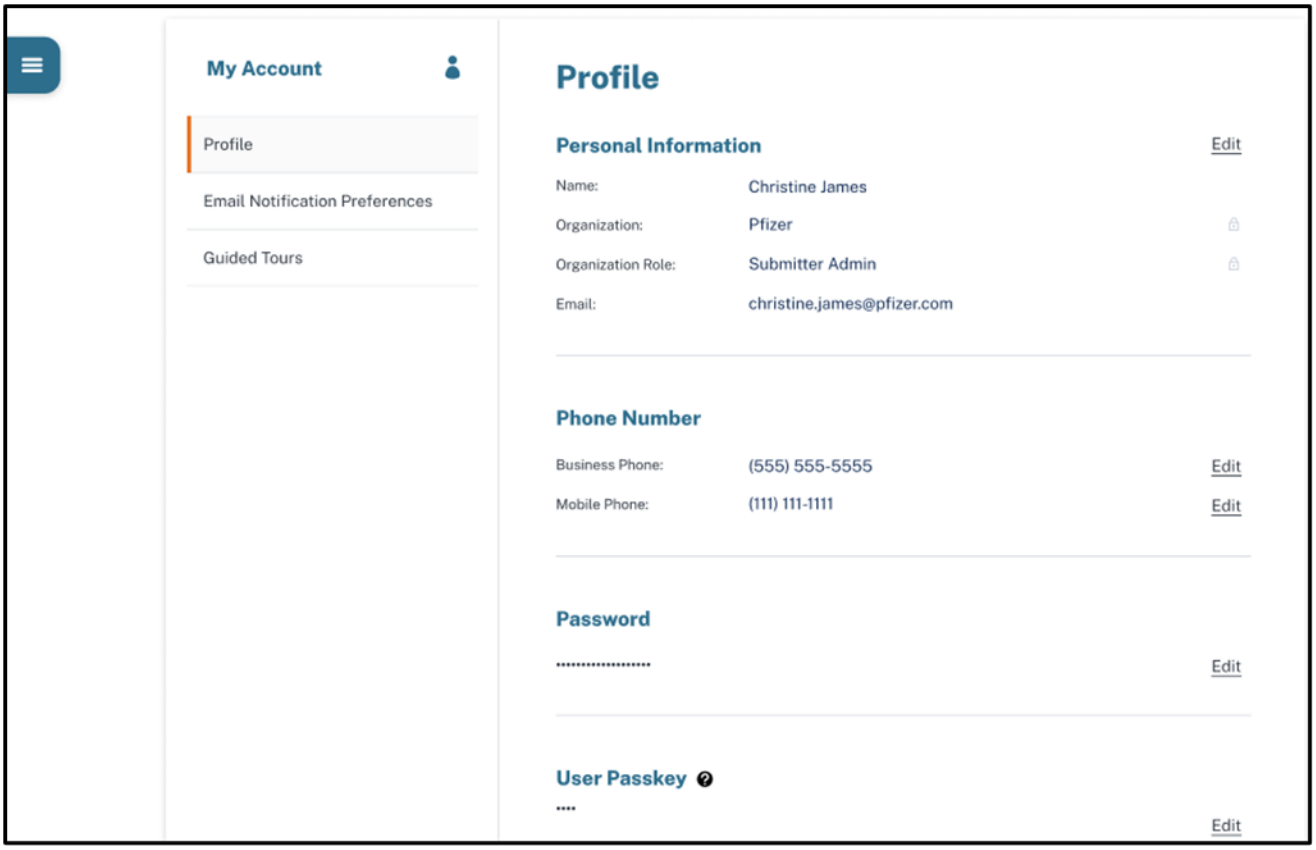

Figure 7.2: My Account Landing Page.

Profile

My **Profile** area houses personal account information and notification preferences.

Personal Information and Phone Number

Select the **Profile** tab on the left of the screen. Select the **Edit** hyperlink in line with the **Personal Information** section and follow the steps provided.

Note: The field opens allowing the user to edit the phone number. If the phone number selected is not assigned to a two-factor authentication and the user would like to use a two-factor authentication, select **Use this number for two-factor authentication**.

Figure 7.3: Edit Profile Information.

Figure 7.4: Edit Personal Information.

Note: The lock (🔒) icon on the right-hand side of the field indicates that the field cannot be edited. These can only be edited by the Administrator. If a user is a member of multiple organizations, the user will not be able to edit the email address. The user must be deactivated from the organizations and re-added to the Portal as a new user with a new email address.

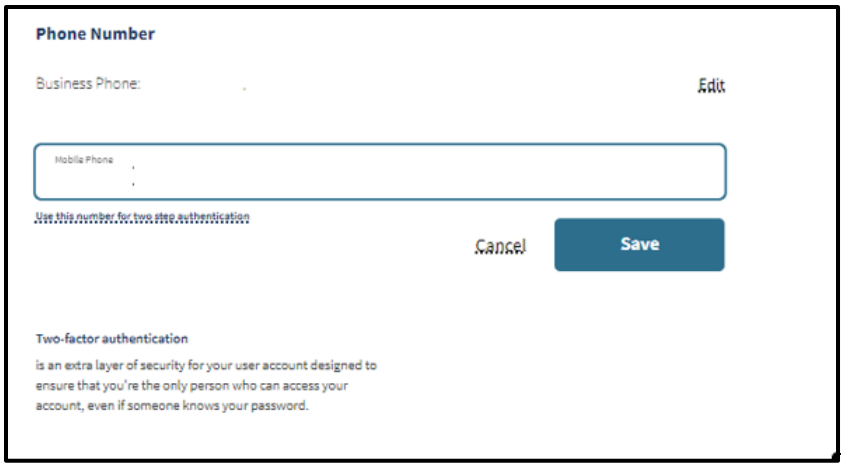

Figure 7.5: Edit Phone Number.

A confirmation appears indicating the updated information was successfully updated.

Change a Password or Passkey

1. Select the **Profile** tab on the left of the screen. Select the **Edit** hyperlink in line with the Password or User Passkey section and follow the steps provided.

Figure 7.6: Edit Passkey.

2. Enter a new four (4) digit passkey into the fields and select **Save Changes**. It is important to remember the passkey as it will be needed to reset passwords with the help desk and for security verification.

Figure 7.7: Edit Passkey.

Once complete, a successfully updated user passkey message will appear.

Email Notification Preferences

Users automatically receive notifications in the Provider Portal.

1. Select **My Account**.

Figure 7.8: Select My Account.

2 Select **Email Notification Preferences.**
3 Select **Only required emails** or **All Provider Portal emails**.
4 Set the EDI transaction frequency to **Daily**, **Weekly** or **None**.
5 Select **Save Changes**.

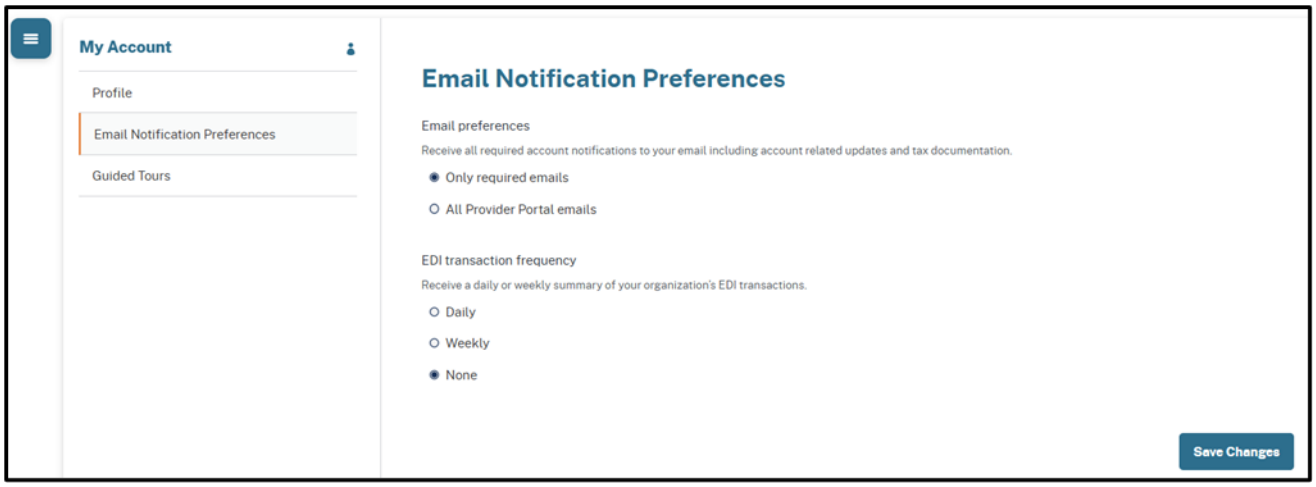

Figure 7.9: Change Email Notification Preferences.

Edit Submitter Directory Information

This area may only be accessed by submitters who are designated as organization administrators. The Edit Submitter Directory Information page is divided in the following three sections: **Organization Information**, **Contact Information** and **Submitter Directory Listing**.

1. From the **Provider Portal menu**, select **Manage Organization**.

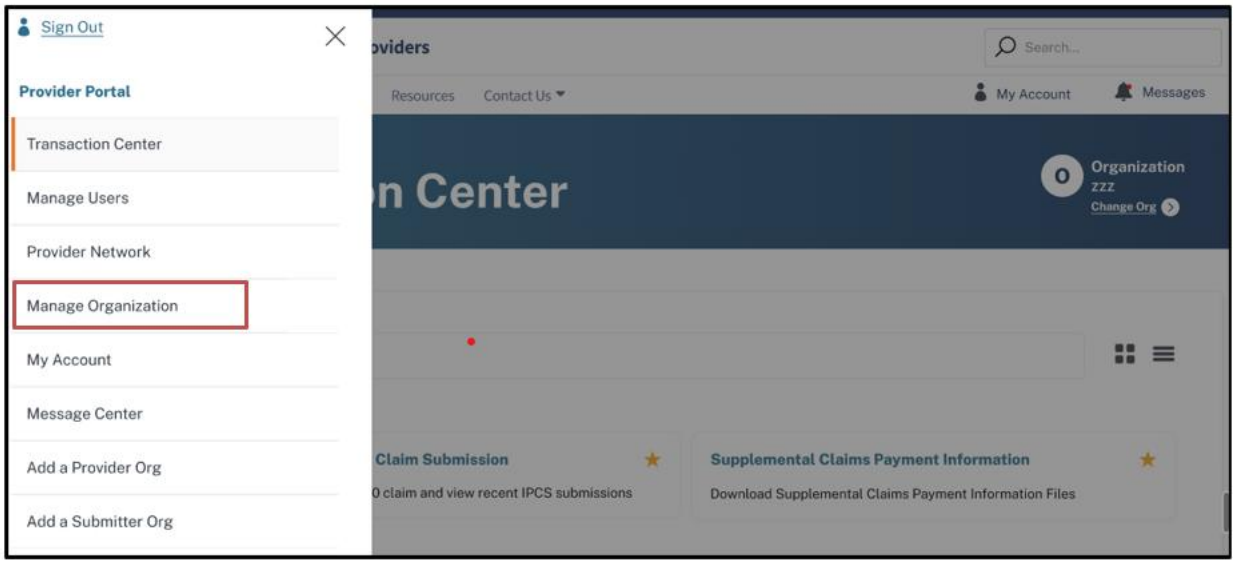

Figure 7.10: Provider Portal Menu.

2. Select Edit next to Organization Information.

Figure 7.11: Select Edit.

Note: The lock (🔒) icon on the right-hand side of the field indicates that the field cannot be edited. These fields can only be edited by the Administrator. If a user is a member of multiple organizations, the user will not be able to edit the email address. The user must be deactivated from the organizations and re-added to the Portal as a new user with a new email address.

3 Update the desired information and select **Save.**

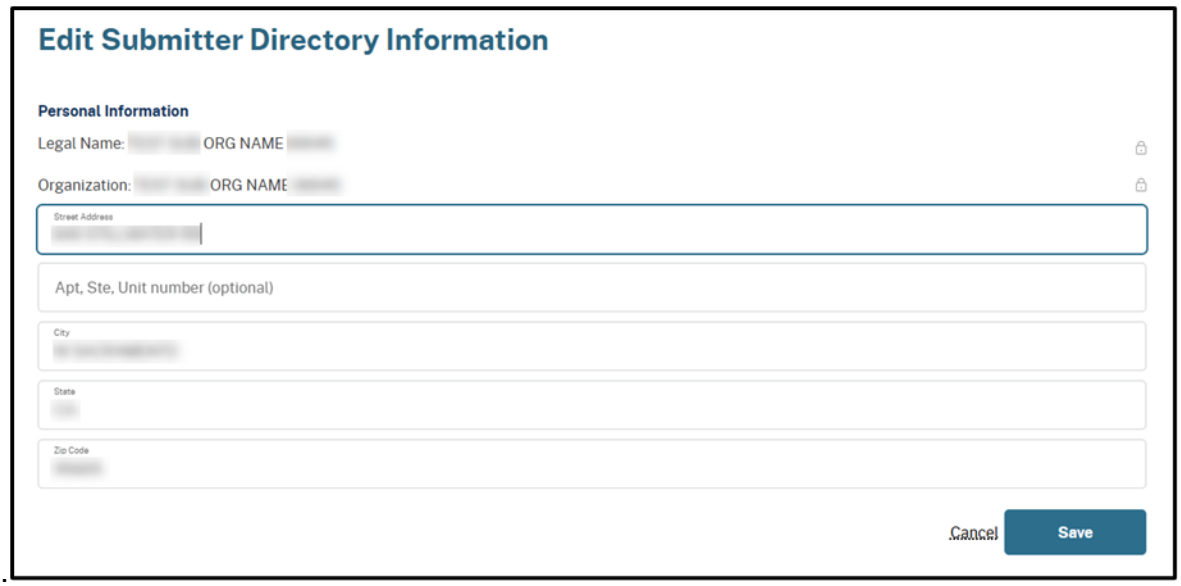

Figure 7.12: Edit Submitter Personal Information.

4 Select Edit next **to Personal Information**.

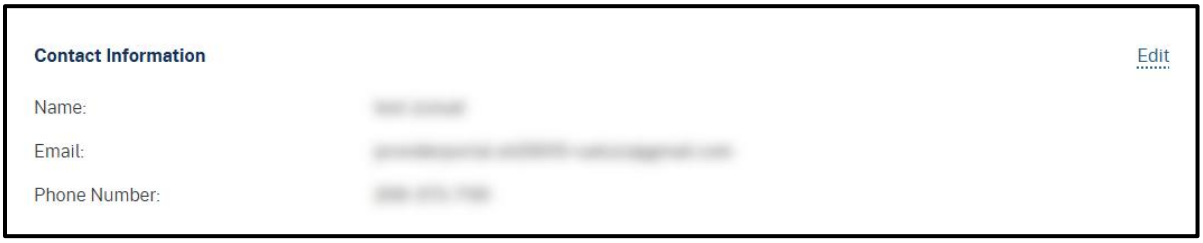

Figure 7.13: Edit Contact Information.

5 Select **Edit** next to Submitter Directory Listing.

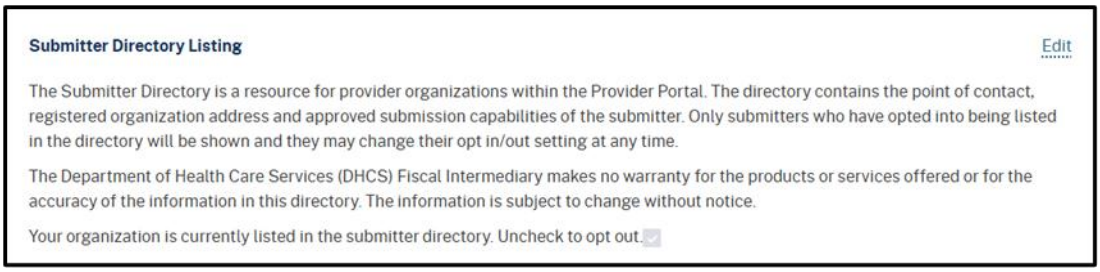

Figure 7.14: Submitter Directory Listing Section.

6 Change opt-in/out setting at any time by marking the check box, then select **Save.**

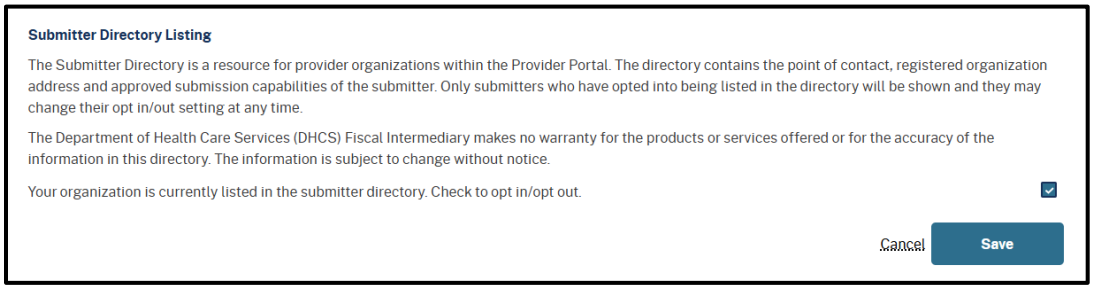

Figure 7.15: Edit View of Submitter Directory Listing.

Note: This area may only be accessed by those who are designated as Administrators of the submitter organization.

Guided Tours

Guided tours are available within Provider Portal to point out key features of the applications.

1. Access **Guided Tours** anytime through the Guided Tours tab in My Account.

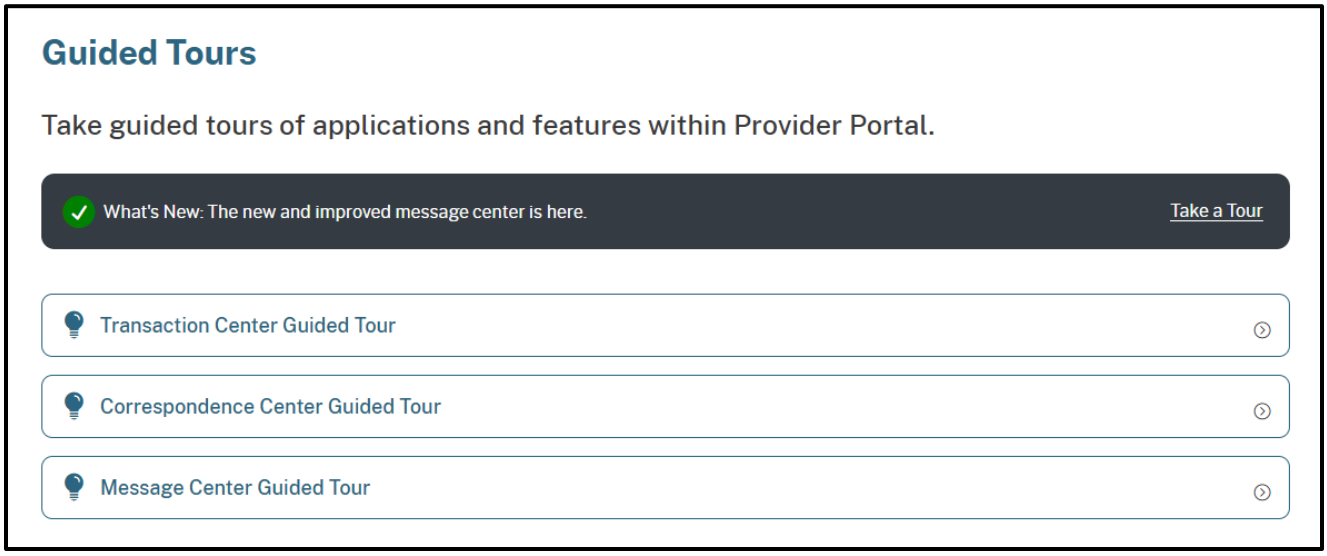

Figure 7.16: Guided Tours.

Organizations

Select **Add a Provider Org** or **Add a Submitter Org** to provide access to providers and submitters to the administrator's login credentials. Refer to Add New Organization section of this user guide for step-by-step instructions.

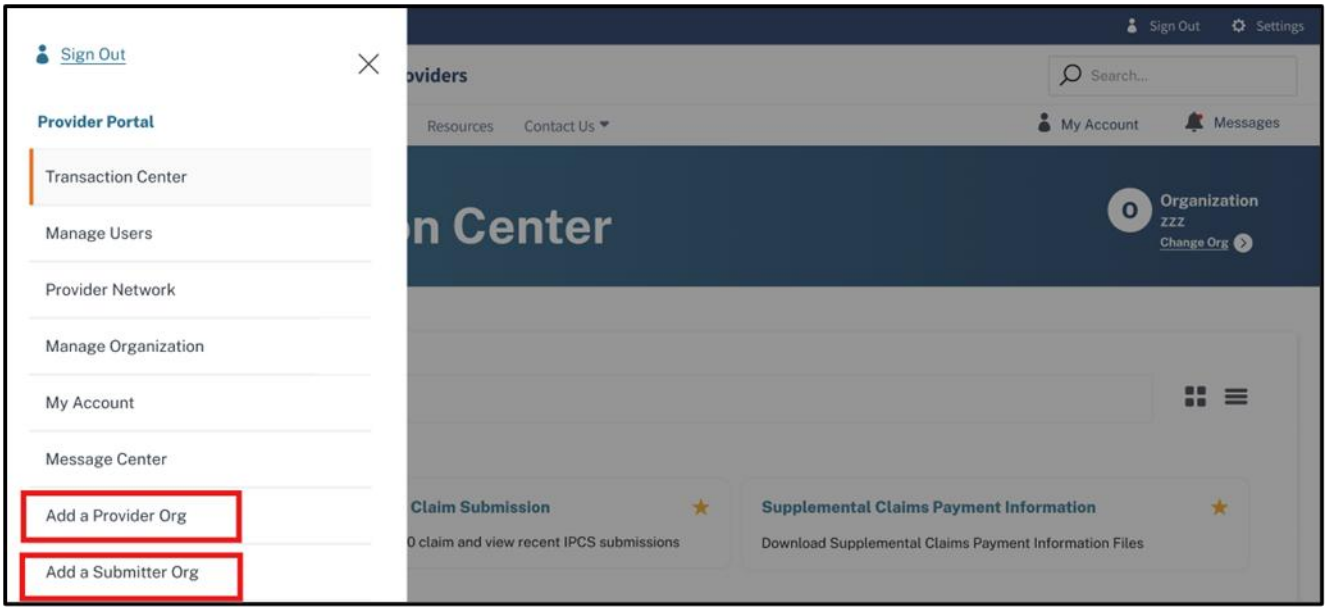

Figure 7.17: Add New Organization.

Message Center

The **Message Center** contains **Messages** and **Notifications**. If there are new messages or notifications a “dot” will appear next to the bell (🔔) icon.

1. To see all notifications, select Messages at the top of the page or select Message Center in the Provider Portal menu.

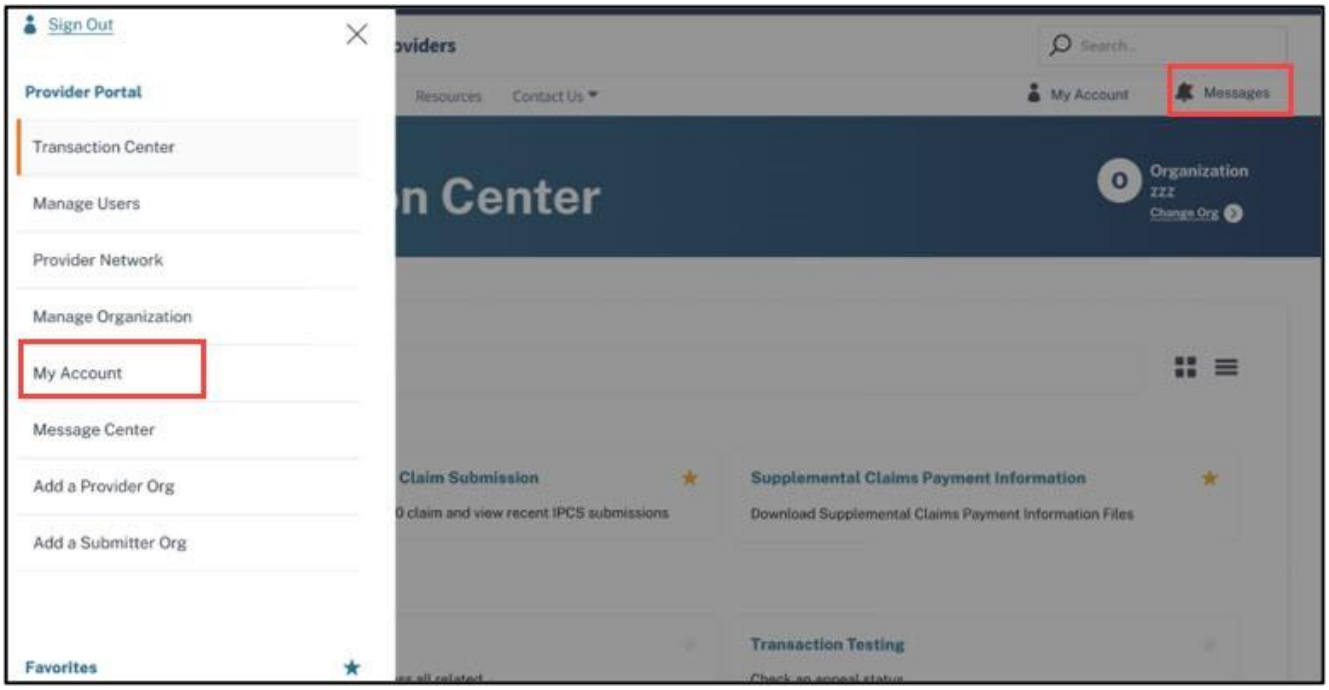

Figure 8.1: Provider Portal menu.

2. Select the **Notifications** tab to view important notifications regarding transactions. Notifications can be viewed by using the **Filter by Date Range** or the **Filter by Type** dropdown list.

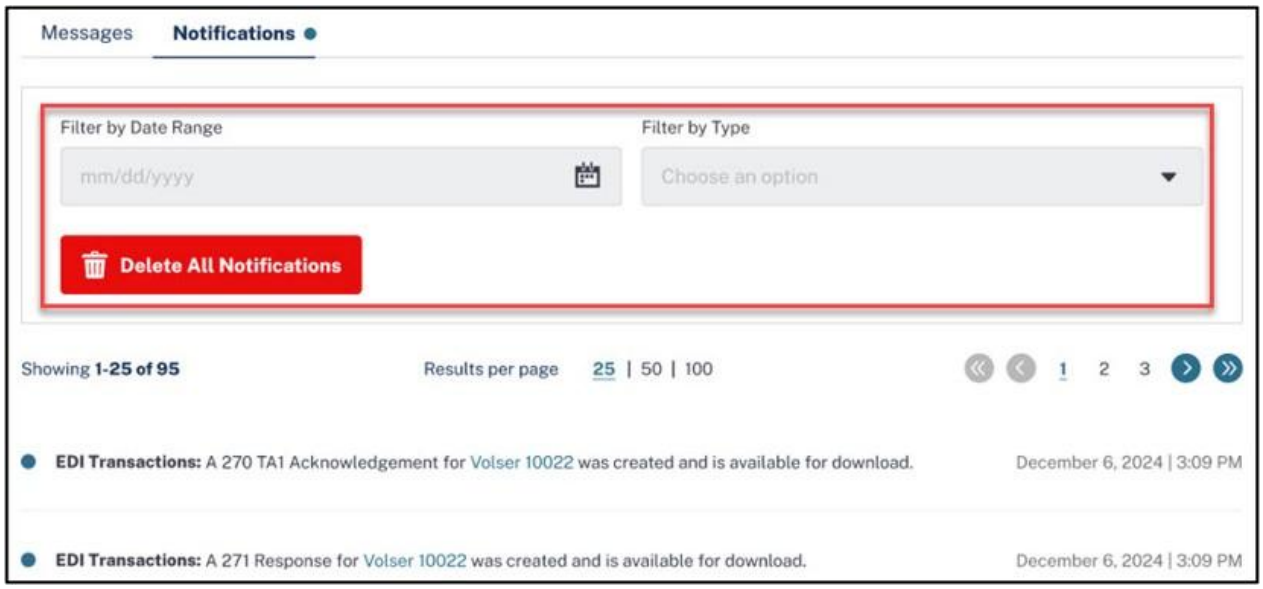

Figure 8.2: Notifications.

Delete Notifications

Only Organization Administrators have access to delete outdated notifications. This deletes notifications for all users in the entire organization. After the desired filter(s) are applied, the **Delete button** will display the total number of notifications that are eligible for deletion.

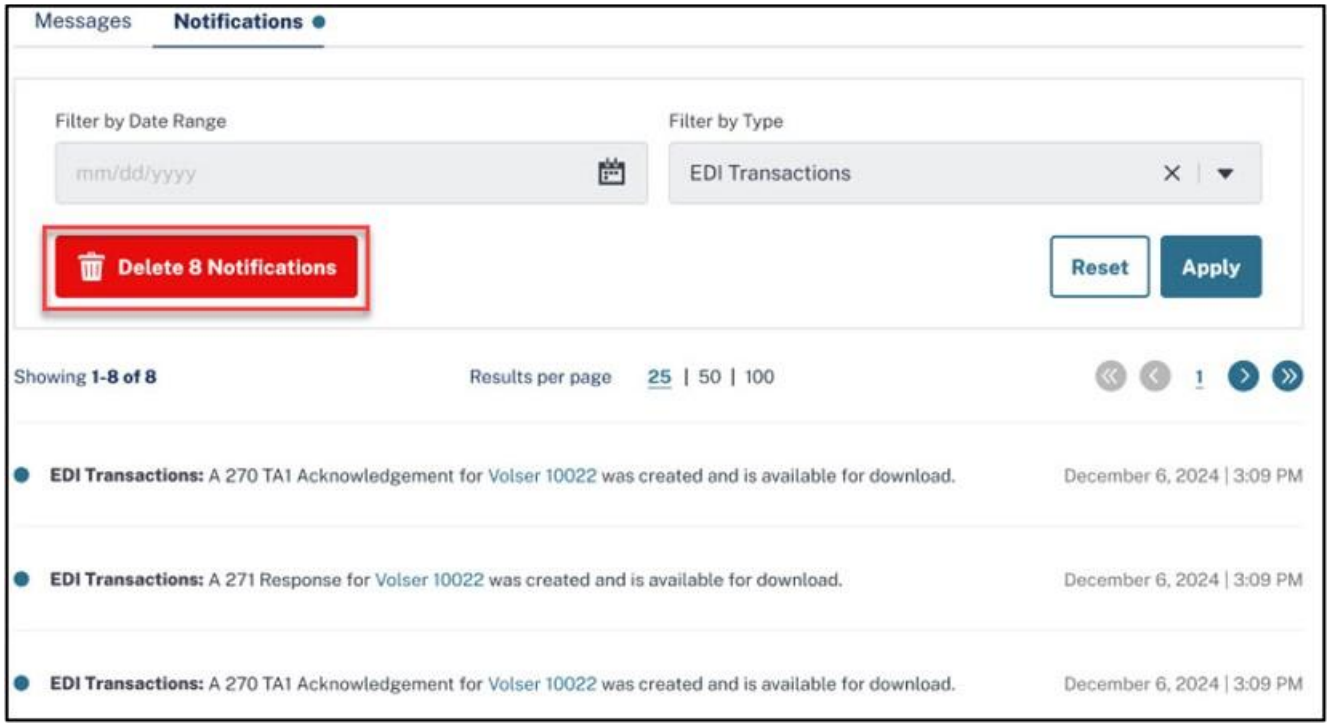

Figure 8.3: Delete Notifications.

Change Summary

Version Number	Date	Description	Notes/Comments
1.1	July 28, 2023	Associated with SDN 20015B	Updated screenshots and instructions to include 835 Receiver Management. Updated User Guide format.
1.2	March 15, 2024	Associated with SDN 20015B	Updated screenshots to match the new DHCS rebranding and the Transaction Center functions.
1.3	September, 2024	Associated with SDNs 20015B and 23036	Updated screenshot to include the new Passkey and Unlock Password features in Provider Portal. Also, updated the DHCS logo on the cover page. Update formatting.
1.4	July 2025	Update	Updated screen shots with current UI and instruction/figure description updated to match UI.
1.5	September 2025	Title Update	None
1.6	October 2025	User Guide Template update.	Removed “Page Updated: Month Year” on each page. Changed CA-MMIS to California Medicaid Management Information System.
1.7	March 2026	Update	Added 835 Receiver instructions and updated screen shots.
1.8	April 2026	Update	Deleted reference to Dashboard
1.9	June 2026	Update for notifications usages and screen shots	Organization information access updates
1.10	July 2026	Update to messaging/ notifications.	None
2.0	October 2026	Updated screenshot.	None