State of California
Department of Health Care Services

Medi-Cal Provider Portal User Guide: Registration

Department of Health Care Services (DHCS)

CA-MMIS

V 1.0

February 2025

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Overview

The purpose of the *Provider Portal User Guide: Registration* is to be a comprehensive instructional document that provides step-by-step instructions for how to register as a provider or submitter in the Medi-Cal Provider Portal.
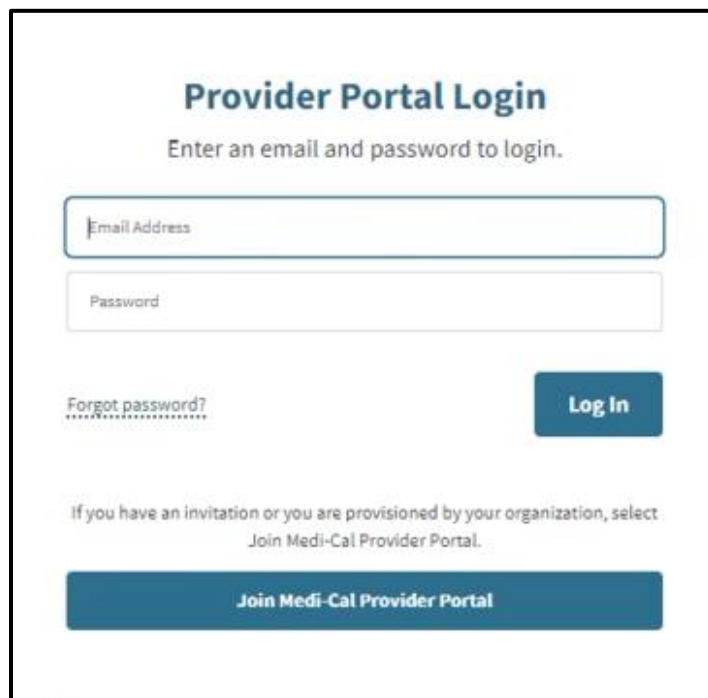
Introduction to the Provider Portal

The Provider Portal is an area within the Medi-Cal Providers website that houses general information and day-to-day work for Medi-Cal providers and provider healthcare staff. It focuses on reducing paper communications 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.

Register a Provider Organization

Providers must first select an administrator to represent their organization. This administrator will register the organization in the Medi-Cal Provider Portal and create an account for the organization. A secure token is sent by hard-copy (paper) letter to the pay-to address on file with Medi-Cal. **It must be used within 30 days of the date it is issued or it will expire**. Alternatively, you may call the Telephone Service Center (TSC) at 1-800-541-5555 (Monday to Friday, 8 a.m. to 5 p.m., except for holidays) in order to obtain a new secure token. Once an appropriate person has been selected as the Provider Portal Administrator, and has received the token, the steps below should be followed.

1. Navigate to the **Log In** screen and click **Join Medi-Cal Provider Portal**.
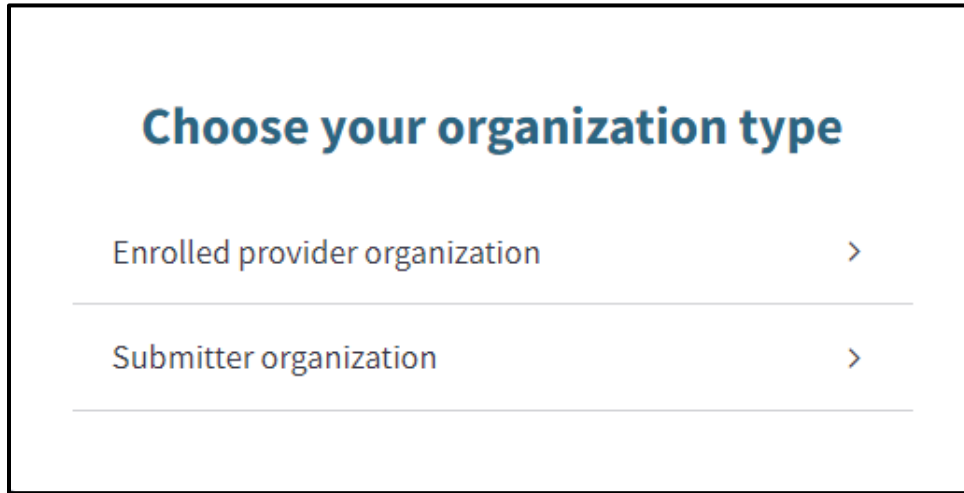
Figure 1.1: Join Medi-Cal Provider Portal Registration Button.

2. Click **Enrolled provider organization** on the **Choose your organization type** screen.
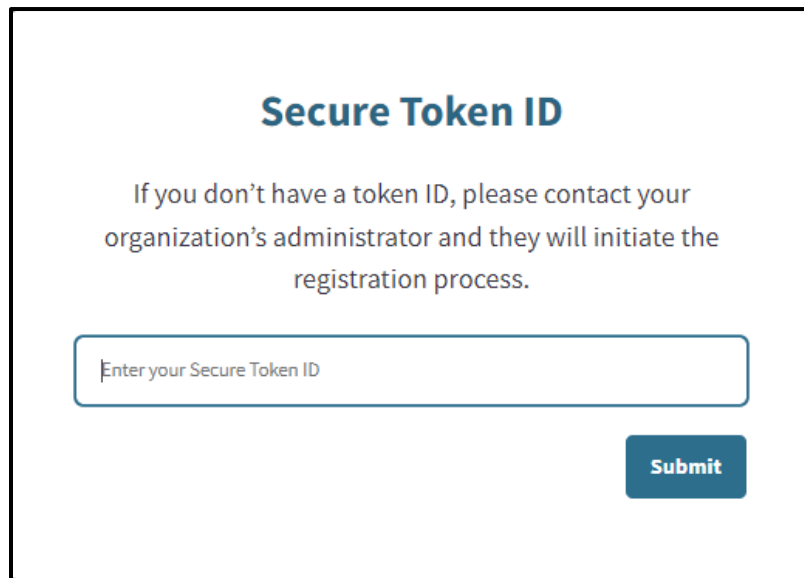
Figure 1.2: Choose your organization type.

3. Enter a **Secure Token ID** and click **Submit.**

Figure 1.3: Secure Token ID.

4. Read the **Terms and Conditions for the Medi-Cal Provider Portal**. Select the two checkboxes and click **Next.**

Figure 1.4: Terms and Conditions for Medi-Cal Portal.

5. Enter an **Email**, **First Name**, **Last Name**, **Provider Employer Identification Number/Social Security Number (EIN/SSN)**, **Provider Pay-To ZIP** associated with the EIN/SSN, **Provider Contact Email Address** and **Preferred Contact Number** to register an account.

Figure 1.5: Account Information.

6. To verify the account, a **One-Time Passcode (OTP)** will be sent to the Administrator's phone. The Administrator will need to indicate how to receive this passcode, via SMS (text) or Voice (call). Select the method and click **Next**.

Figure 1.6: OTP.

7. Enter the last six digits of the **OTP** and click **Next**.

One-Time Passcode

Enter the one-time passcode provided to you in your mobile phone. This passcode will expire in 30 minutes

Sent to phone number ending in 1394

2156 -   One-time passcode

Resend one-time passcode   **Next**
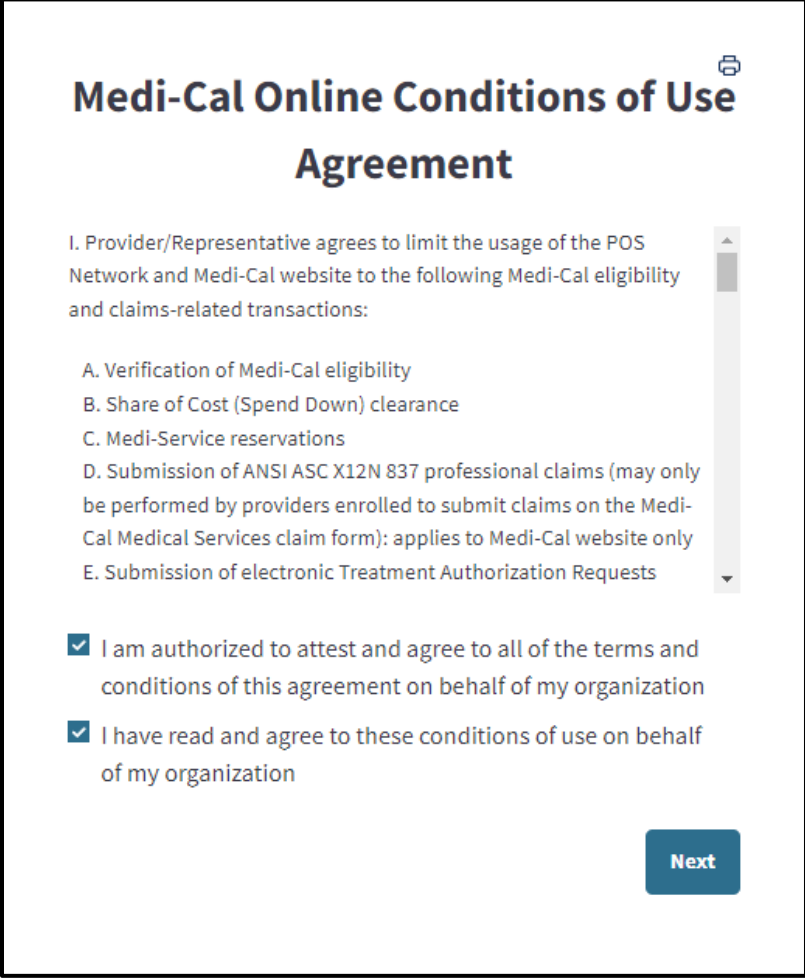
Having trouble? Use another phone number instead.
Contact your organization administrator or the Telephone Services Center.

Figure 1.8: Enter OTP.

8. Read and agree to the **Medi-Cal Online Conditions of Use Agreement.** Select the two checkboxes and click **Next.**

Figure 1.9: Medi-Cal Online Conditions of Use Agreement.

9. Once registration is complete, a notification will be sent to the email used during sign-up to set up a password. Click **Set your new password** to continue the registration process.

   Note: **This must be done within 10 minutes, or the link will expire**. If this process is not completed within 10 minutes, the Administrator must go to the Provider Portal Login page and click **Forgot Password?** in order to gain access to the Provider Portal.
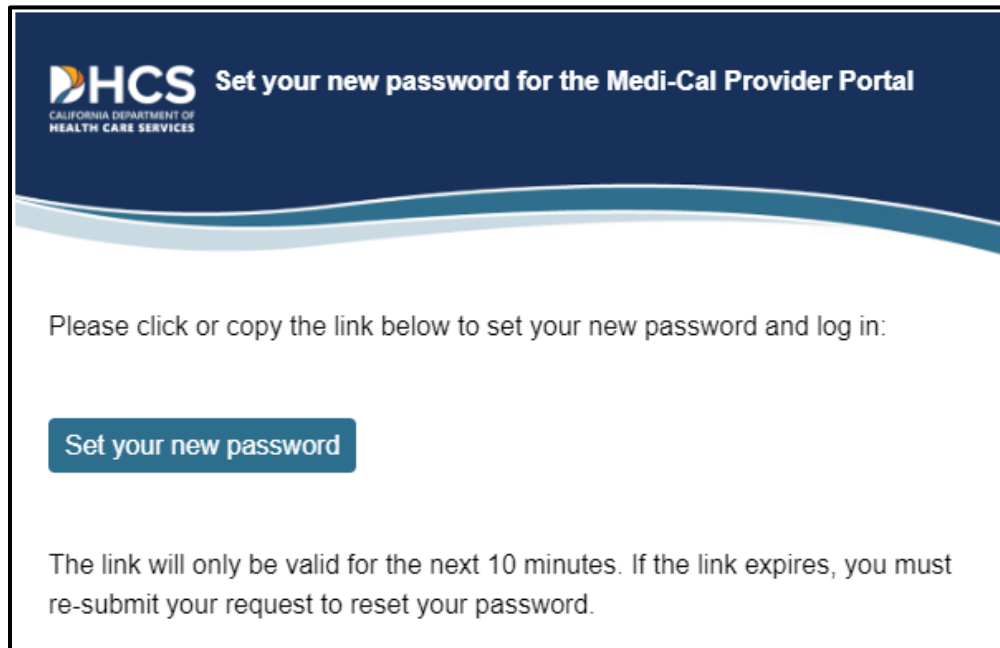
Figure 1.10: Set new password email notification.

10. A screen to **Create New Medi-Cal Password** will appear. Enter a password that aligns with the password criteria and click **Submit**.

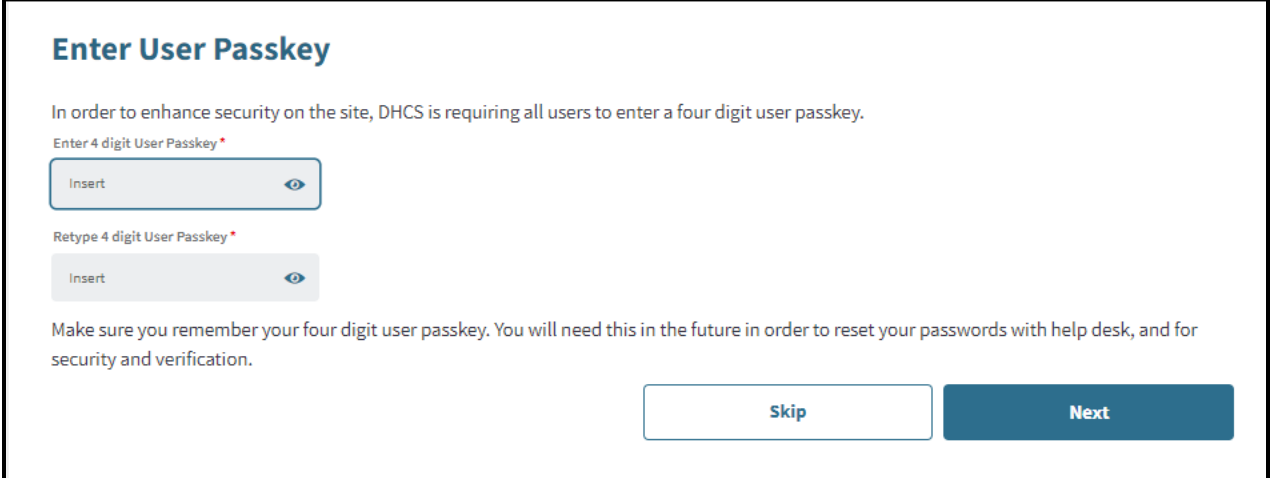

Figure 1.11: Create New Medi-Cal Password.

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 recently used password cannot be reused.

11. The Administrator has now successfully registered the organization and has administrative privileges to all NPIs in the organization.

Set Passkey

After registration is complete, the **Enter User Passkey** screen will appear to create a four (4) digit passkey for additional security. Once the new passkey is entered, click **Next** to continue or click **Skip** to bypass adding the new passkey.

Note: The passkey can be set later from the **My Profile and Preference** tile of the dashboard.

Enter User Passkey

In order to enhance security on the site, DHCS is requiring all users to enter a four digit user passkey.

Enter 4 digit User Passkey *

| Insert | 👁 |

Retype 4 digit User Passkey *

| Insert | 👁 |

Make sure you remember your four digit user passkey. You will need this in the future in order to reset your passwords with help desk, and for security and verification.

Skip   Next

Figure 1.31: Enter User Passkey.

Provider Dashboard

The Provider Portal is designed to house communications, notifications and organization information. Users within a provider organization have the option to be assigned as an Administrator or a Processor.

The **Administrator** will have access to all Provider Portal features and organization administration functions. The **Processor** will be able to make use of the organization features such as Transaction Testing and access to the Transaction Center but will not have access to the organization administration functions.
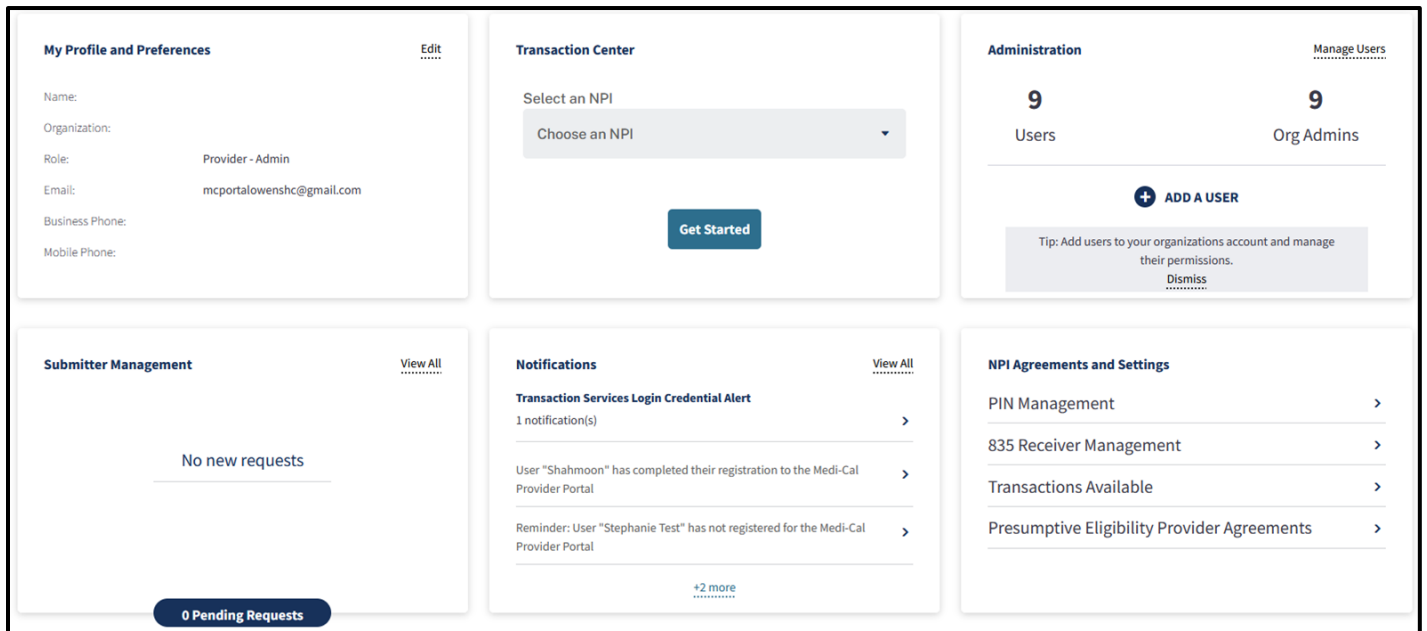
Figure 1.32: Provider Admin Dashboard.

The Provider Portal contains seven (7) areas on the **Dashboard**. Here is an overview:

- **My Profile and Preferences** contains user contact information and allows adjustment to email notification settings.

- The **Transactions Center** allows users to create and keep track of various transactions, and single sign on to Transaction Services.

- **Administration** displays information about users within an organization. This area permits Administrators to: update user permissions and information, to add and/or remove user profiles.
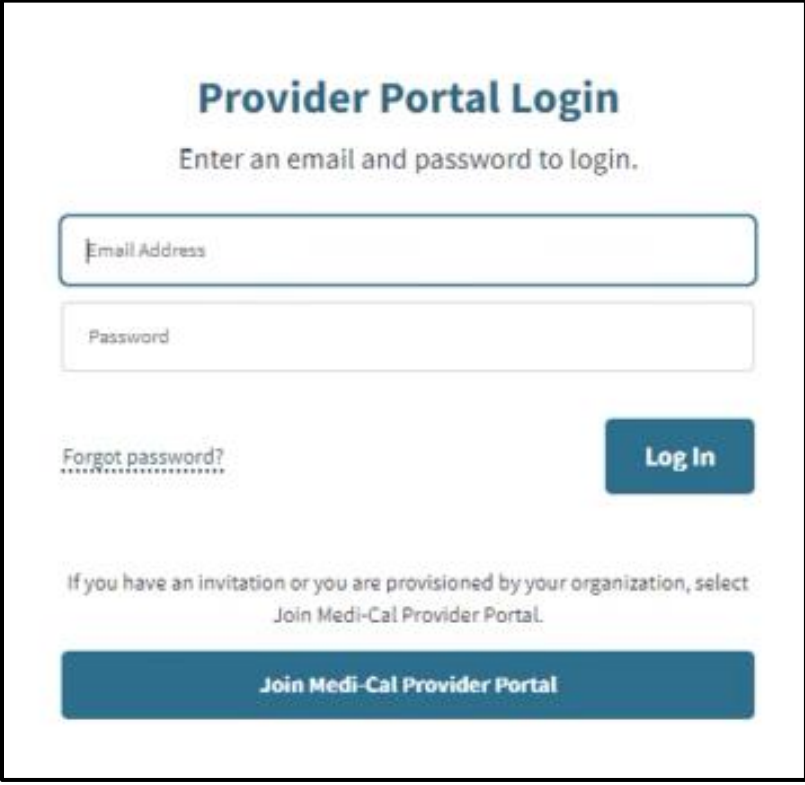
- **Submitter Management** allows a user to view new affiliation and pending requests, manage submitters and view the submitter directory.

- **Notifications** allows a user to view unread and past notifications about an organization. Notifications can be searched for or filtered by date.

- **NPI Agreements and Settings** allows a user to search for NPIs within an organization, update NPI Provider Identification Numbers (PINs), manage 835 receivers, view Transactions Available for an NPI and Presumptive Eligibility Provider Agreements.

- **Correspondence Center** allows a user to electronically search, view and download correspondence related to the organization.

Register a New Submitter Organization

Submitters must first select an administrator to represent their organization. This administrator will register the organization in the Medi-Cal Provider Portal and create an account for the organization. Once an appropriate person has been selected as the Provider Portal Administrator, the steps below should be followed:

1. Click **Join Medi-Cal Provider Portal**.

Figure 2.1: Join Medi-Cal Provider Portal Button.

2. Click **Submitter Organization** on the **Choose Your Organization Type** screen.

Choose your organization type

Enrolled provider organization   >

Submitter organization   >
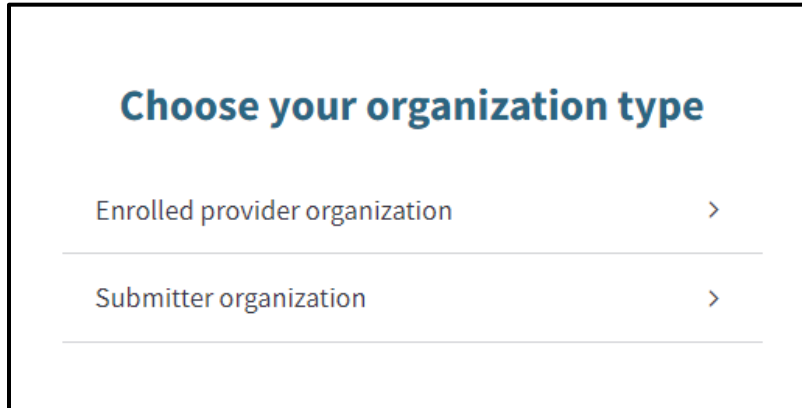
Figure 2.2: Choose your organization type.

3. Click **No, I would like to request authorization to be a Medi-Cal Submitter**.

Are you an authorized Medi-Cal submitter?

Yes, I would like to register my existing Submitter ID   >

No, I would like to request authorization to be a Medi-Cal Submitter   >
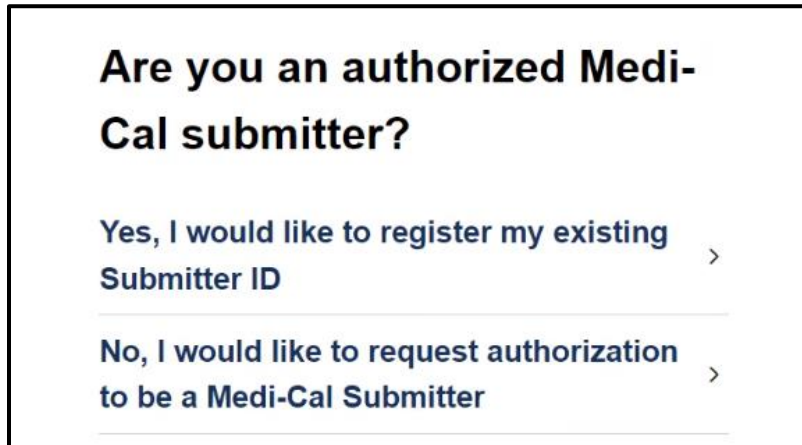
Figure 2.3: New Medi-Cal Submitter.

4. Read the **Terms and Conditions for the Medi-Cal Provider Portal**. Select the two checkboxes and click **Next.**

Figure 2.4: Terms and Conditions for Medi-Cal Portal.

5. On the **Organization Information** screen, enter the **Submitter Organization Information**, **Affiliated Provider Organization** and **Account Information.** Select SMS or Voice to receive passcode, then click **Next**.

Figure 2.5: Organization Information.

6. An **Address Verification** screen appears. Select the correct address and click **Select Address & Continue**.

Figure 2.6: Address Verification.

7. Enter the last six digits of the **OTP** and click **Next**.

> **Note:** Depending on the user's phone carrier, there may be a delay in receiving an OTP. Please wait for the OTP to be received. If ten minutes has passed and the user has not received an OTP, the user may click **Resend one-time password.**

Figure 2.7: OTP.

8. Read and agree to the **Medi-Cal Online Conditions of Use Agreement**. Select the two checkboxes and click **Next.**

Figure 2.8: Medi-Cal Online Conditions of Use Agreement.

9. A screen for the *Medi-Cal Telecommunications Provider and Biller Application/Agreement* (DHCS 6153) form will appear. Read and complete the agreement form and click **Submit Agreement**.

Figure 2.9: Medi-Cal Telecommunications Provider and Biller Application/Agreement.

10. **Registration Complete** screen for affiliation request will appear.
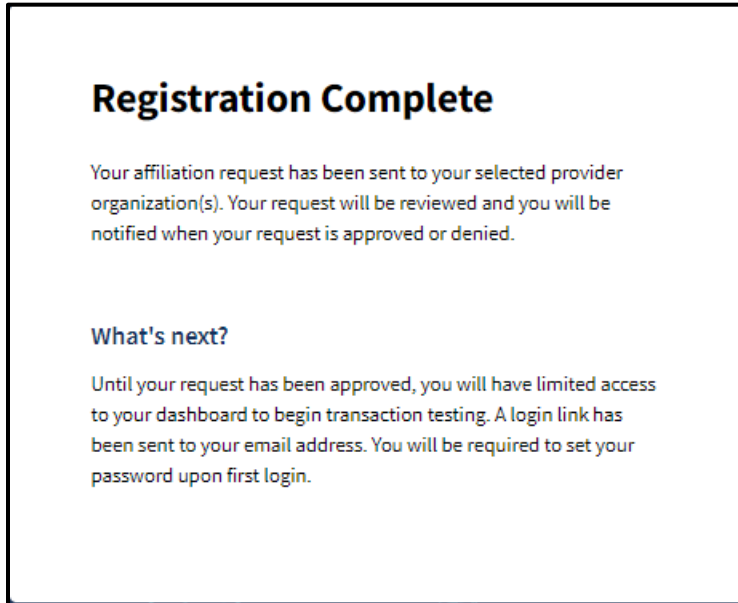
Figure 2.10: Registration Complete.

11. Once registration is complete, a notification will be sent to the email used during sign-up to set up a password. Click **Set your new password** to continue the registration process.

   Note: **This must be done within 10 minutes, or the link will expire**. If this process is not completed within 10 minutes, the Administrator must go to the Provider Portal Login page and click **Forgot Password?** in order to gain access to the Provider Portal.
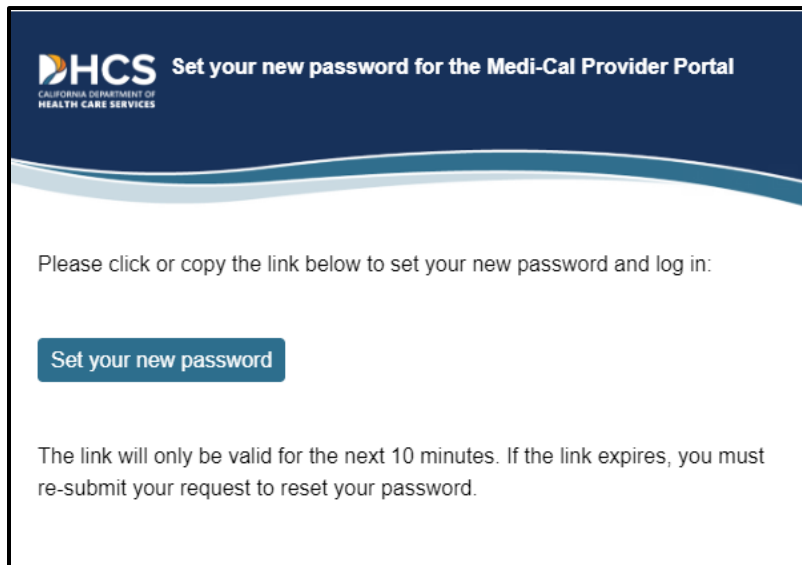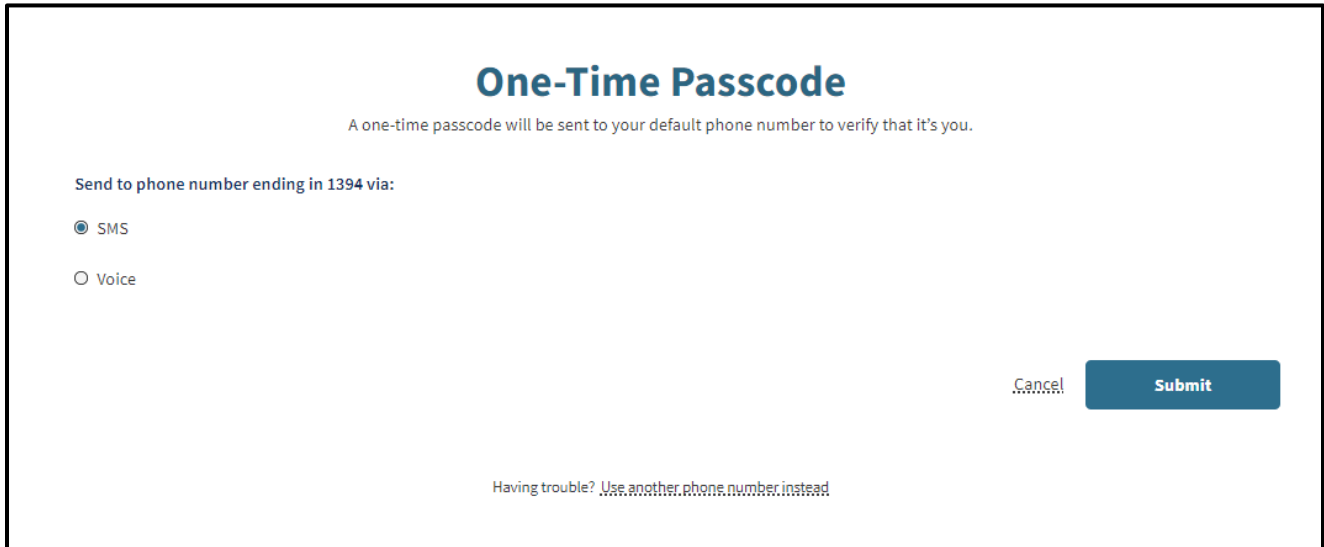
Figure 2.11: Set Your New Password Email Notification.
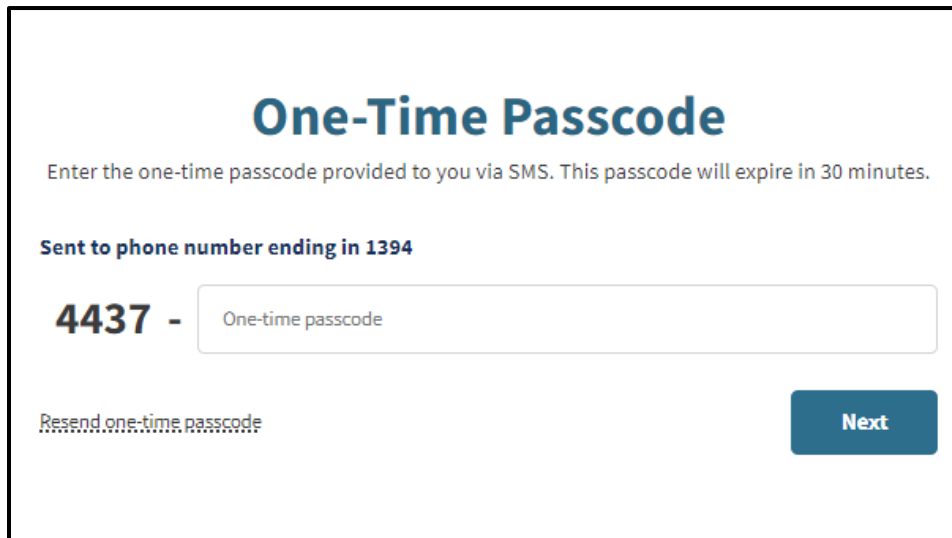
12. A screen to receive an OTP will appear. Select to receive the passcode via **SMS** or **Voice** and click **Submit**.

Figure 2.12: OTP.

13. Enter the last six digits of the OTP and click **Next**.

Figure 2.13: Enter OTP.

14. A screen to **Create New Medi-Cal Password** will appear. Enter a password that aligns with the password criteria and click **Submit**.

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

Figure 2.14: Create New Medi-Cal Password.

Set Passkey

After registration is complete, the **Enter User Passkey** screen will appear to create a four (4) digit passkey for additional security. Once the new passkey is entered, click **Next** to continue or click **Skip** to bypass adding the new passkey.

Note: The passkey can be viewed and reset later from the **My Profile and Preference** tile of the dashboard.

Figure 2.15: Enter User Passkey.

Submitter Dashboard

The Provider Portal is designed to house communications, notifications and organization information. Users within a submitter organization may be assigned as an Administrator or a Processor.

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 Transaction Center but will not have access to the organization administration functions.

Figure 2.16: Provider Portal Submitter Admin Dashboard.

The Portal contains six (6) areas on an Administrator's Dashboard. Here is an overview:

- **My Profile and Preferences** contains personal contact information and submitter ID. This allows adjustment to email notification settings.

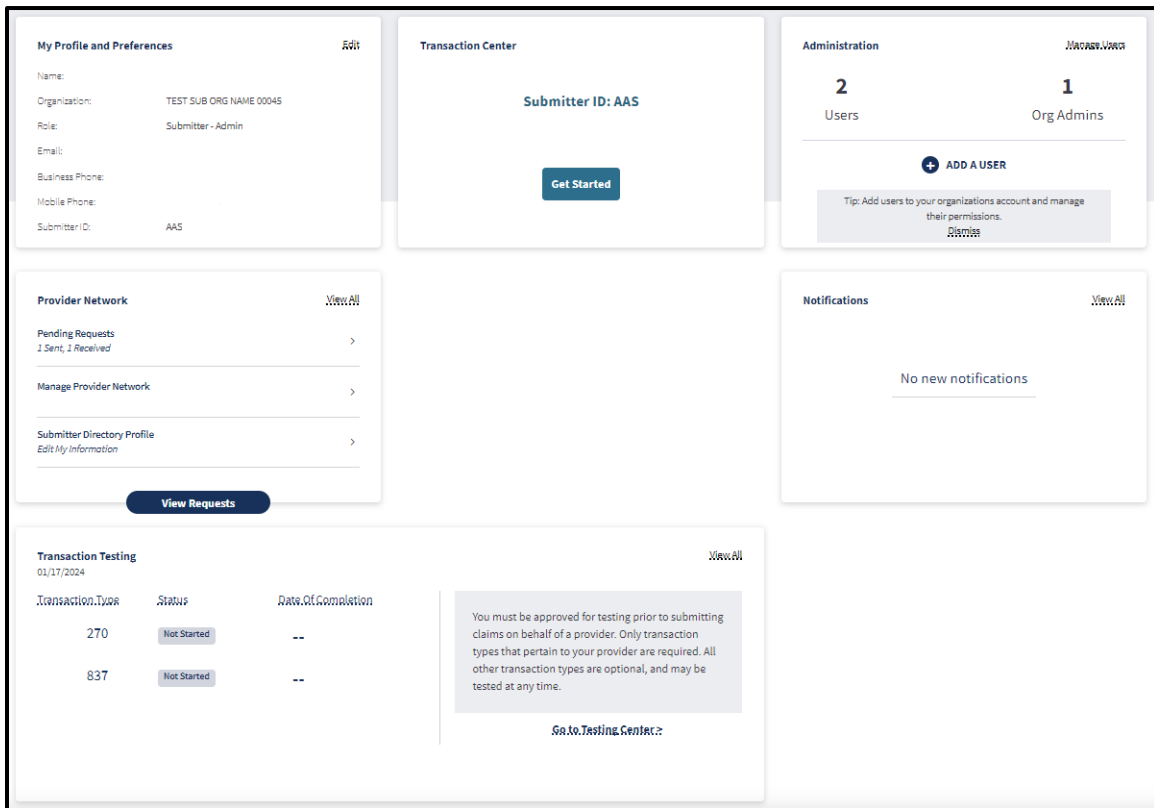- The **Transactions Center** allows users to create and keep track of various transactions, and single sign on to Transaction Services.

- **Administration** displays information about users within an organization. This area permits Administrators to update user permissions and information, and add and/or remove user profiles.

- **Provider Network** area allows a user to electronically search, view and download correspondence related to the organization. A user may search by NPI, document type or date.

- **Notifications** allows a user to view unread and past notifications about an organization. Notifications can be searched for or filtered by date.

- **Transaction Testing** allows a user to submit transaction testing for 837 and 270 claim transactions.

Account Status Bar

The **Account Status** bar located on the bottom of the Dashboard page displays the approval status of: **Submit affiliation request(s)**, **Complete transaction testing** and **Receive provider approval**. The bar will read **Pending approval** until all three tasks are checked. Once they are all complete, the bar will disappear.
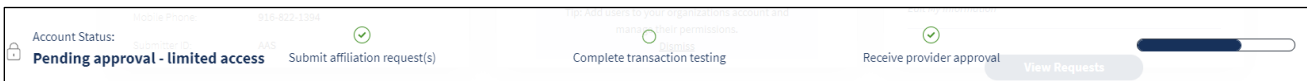
Figure 2.17: Account Status Dashboard.

Change Summary

Version Number	Date	Description	Notes/Comments
1.0	February 2025	Associated with Provider Portal	New Registration guide with only Provider and Submitter organization steps.