

# Medi-Cal Provider Portal User Guide: Registration

Department of Health Care Services (DHCS)

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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.

Ent	Provider Port	al Login sword to login.
Email Address		
Password		
Forgot password	7	Log In
If you have an inv	vitation or you are provision Join Medi-Cal Provide	ned by your organization, select er Portal.
	Join Medi-Cal Provid	ler 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.

If you don't have a token ID, please contact your organization's administrator and they will initiate the registration process.	S	ecure Token ID
Enter your Secure Token ID	If you don't ha organization's ad	ave a token ID, please contact your dministrator and they will initiate the registration process.
	Enter your Secure Toker	n ID

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.

Enter the follow	ing to register your a	account
Email Address (userr	name)	
Please enter a valid ema	ail address	
First Name		
Last Name		
Provider EIN/SSN		
Provider Pay-To Zip	Code	
Provider Contact Err	nail Address	
'ou will receive a one-	time passcode to verify	your accoun
Preferred Contact N	umber	
Receive passcode <mark>vi</mark> a:		
Voice		
D SMS		

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**.

<b>One-Time Passcode</b> A one-time passcode will be sent to your default phone number to verify that it's you.	
Send to phone number ending in 1394 via:	
● SMS	
O Voice	
Cancel Submit	
Having trouble? Use another phone number instead	

Figure 1.6: OTP.

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



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.

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- 9. Once registration is complete, a notification will be sent to the email used during signup 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.

Set your new password for the Medi-Cal Provider Portal
Please click or copy the link below to set your new password and log in:
Set your new password
Set your new password
The link will only be valid for the next 10 minutes. If the link expires, you must
re-submit your request to reset your password.

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**.

New Password	۲
<ul> <li>Minimum of 15 characters</li> </ul>	<ul> <li>Must include at least one: uppercase character, lowercase character, number, and special character (e.g.1S#%)</li> </ul>
Cannot reuse a recently used pas	sword
Re-Enter Password	
View Password	<b>Submit</b>

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.

Linter User	Passkey					
In order to enhance	e security on the sit	e, DHCS is requiri	ng all users to enter	a four digit user passke	у.	
Enter 4 digit User Passko	éy *					
Insert	•					
Retype 4 digit User Pass	key*					
Insert	•					
Make sure you rem security and verific	ember your four di ation.	git user passkey. Y	′ou will need this in	the future in order to re	set your passwords	with help desk, and for
			Γ	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.

My Profile and Preferences	Edit	Transaction Center	Administrati	on Manage Users
Name: Organization: Role: Provider - Admin Email: mcportalowenshc@gmail.com Business Phone: Mobile Phone:		Select an NPI Choose an NPI Get Started	· Users	9 Org Admins • ADD A USER Add users to your organizations account and manage their permissions. Dismiss
Submitter Management No new requests	View All	Notifications         View           Transaction Services Login Credential Alert         Inotification(s)           I notification(s)         Inotification to the Medi-Cal           User "Shahmoon" has completed their registration to the Medi-Cal         Provider Portal           Reminder: User "Stephanie Test" has not registered for the Medi-Cal         Provider Portal           Provider Portal         #2 more	<ul> <li>NPI Agreeme</li> <li>PIN Manag</li> <li>835 Receiv</li> <li>Transactio</li> <li>Presumpti</li> </ul>	ement > er Management > ns Available > ve Eligibility Provider Agreements >

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.

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- **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.

Log In
tion, sele

Figure 2.1: Join Medi-Cal Provider Portal Button.

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



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?	Ċ.
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.

Enter the following info Cal as a r	rmation to b new Biller/Su	egin the proc bmitter organ	ess to enroll with Me nization.
STOP: If you are alread register yo	dy an approve our existing a	ed Biller/Subr account with I	nitter you will want Medi-Cal.
Submitter Organization	n Informatio	n	
Submitter Legal Name			
Doing Business As Name	e (DBA) - if app	licable	
Organization Phone Nur	mber		
Address Line 1			
Address Line 2 (optional	0		
City			
State CA		Zip	
Affiliated Provider Orga fou must affiliate with a pro fortal. Please enter the pro s actively enrolled. Please the organization admin will inter an affiliated provider	anization ovider organiza wider tax ID an note: entering II assign access	ation to gain ful d one billing NF an NPI is for ver to NPIs after ap	l access to the Provider 1 in the organization th iffication purposes only pproval.
Affiliated Provider Orgs fou must affiliate with a pri Portal. Please enter the pro a sotively enrolled. Please The organization admin will Enter an affiliated provider	anization ovider organiza ovider tax ID an note: entering II assign access organization t	stion to gain ful d one billing NF an NPI is for ver to NPIs after aj o verify your rej	l access to the Provide ?) in the organization th ification purposes only pprovel. gistration.
Affiliated Provider Orga You must affiliate with a pro Portal. Please enter the pro a actively enrolled. Please Phe organization admin will inter an affiliated provider Provider EIN/SSN	anization ovider organizz ovider tax ID an note: entering Il assign access organization t	ation to gain ful d one billing NF an NPI is for ver to NPIs after aj o verify your rej	l access to the Provide Pl in the organization th fification purposes only pproval. gistration.
Affiliated Provider Orgs You must affiliate with a pro- Parstal. Please enter the pro- s activety enrolled. Please the organization admin will Enter an affiliated provider Provider EIN/SSN NPI	anization ovider organiza ovider tax ID an note: entering II assign access organization t	stion to gain ful d one billing NF an NPI is for ver an NPI is for ver to NPIs after aj o verify your rej	I access to the Provide P in the organization th rification purposes on pproval. gistration.
Affiliated Provider Orgs You must affiliate with a pro- Protal. Please enter the pro- society enrolled. Please statiety enrolled. Please Provider an affiliated provider Provider EIN/SSN NPI Account Information	anization ovider organiza ivrider tax ID an note: entering II assign access organization t	stion to gain ful d one billing N an NPI is for ver to NPIs after sy o verify your rej	I access to the Provide P in the organization th rification purposes on pproval. gistration.
Affiliated Provider Orgs fou must affiliate with a pri Portal. Please enter the pro actively encoded. Please the organization admin will inter an affiliated provider Provider EIN/SSN NPI Account Information Email Address	anization ovider organiza vider tax (Da note: entering II assign access organization t	ation to gain ful d one billing NF an NFI is for ver to NFIs after a o verify your rej	I access to the Provide P in the organization th rification purposes on pproval. gistration.
Affiliated Provider Orgs fou must affiliated with a pri Portal. Please enter the pro actively encoded. Please the organization admin will enter an affiliated provider Provider EIN/SSN NPI Account Information Email Address First Name	anization ovider organiza vider tax 10 an note: entering II assign access organization t	ation to gain full d one billing NF an NFI is for ver to NFIs after a o verify your rej	I access to the Provide P in the organization ti rification purposes on pproval. gistration.
Affiliated Provider Orgs Vou must affiliated Provider Orgs Vou must affiliated with a pri Portal. Please enter the pro set viely enrolled. Please The organization admin will Enter an affiliated provider Provider EIN/SSN NPI NPI Account Information Email Address First Name Last Name	anization ovider organiza vider tax 10 an note: entering II assign access organization t	stion to gain ful d one billing NF an NFI is for ver to NFIs after a o verify your rej	l access to the Provide P in the organization th finitation purposes only pproval. gistration.
Affiliated Provider Orgs for must affiliated Provider Orgs for must affiliated with a pri obstal. Please enter the pro southed in the provider of the provider of the provider ElN/SSN NPI NPI Account Information Email Address First Name Last Name You will receive a one-time	anization ovider organiza vider tax Danote note entering II assign access organization t	stion to gain ful d one billing NF an NFI is for ver to NFIs after a o verify your rej	I access to the Provide P in the organization to initation purposes only pproval. gistration.
Affiliated Provider Orgs for must affiliated Provider Orgs for must affiliated with a pro sotiety enclosed. Please the organization admin will inter an affiliated provider Provider EIN/SSN NPI Recount Information Email Address First Name Last Name You will receive a one-time Preferred Contact Numb	anization ovider organization wider tax ID an observation to organization to organization to passcode to v ber	ation to gain ful d one billing NF an NP is for w to NP is after ay o verify your rep rerify your acco	l access to the Provide P in the organization to flication purposes only pproval. gistration.
Affiliated Provider Orgs  Vou must affiliated Provider Orgs  sotiety enrolled Please  The organization admin wil  Enter an affiliated provider  Provider EIN/SSN  NPI  Account Information  Email Address  First Name  Last Name  You will receive a one-time  Preferred Contact Numb  Receive passcode via:	anization ovider organization wider tax ID an observation to organization to o	stion to gain ful d one billing NF ans NFI is for very to NFIs after ap o verify your rep rerify your seco	l access to the Provide P in the organization to flication purposes only pproval. gistration.

Figure 2.5: Organization Information.

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

Address Verification Select the address to use or edit the address				
Organization Addre	55			
<ul> <li>Original Addres</li> </ul>	55	Suggested Address		
West Sacramento	o, CA	W SACRAMENTO, CA		
95605	Edit	95605		
	Cancel	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.**

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					
9567 - Pne-time passcode					
Resend one-time passcode Next					
Having trouble? Use another phone number instead. Contact your organization administrator or the Telephone Services Center.					

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.

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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.

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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 signup 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.

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12. A screen to receive an OTP will appear. Select to receive the passcode via **SMS** or **Voice** and click **Submit**.

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	one miler assedue		
	ime passcode will be sent to your default phone number to verify that it's you.		
Send to phone number ending i			
© SMS			
O Voice			
		Cancel	Submit

Figure 2.12: OTP.

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

Г

Enter the one	time parcede provided to you via SMS. This parcede will evolve in 20 minute
citter the one	-unie passcode provideo to you via sins. This passcode will expire in so minute
Sent to phone	e number ending in 1394
4437	One-time passcode

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.

New Password	۲
<ul> <li>Minimum of 15 characters</li> </ul>	<ul> <li>Must include at least one: uppercase character, lowercase character, number, and special character (e.g.IS#%)</li> </ul>
Cannot reuse a recently used pase	sword
Re-Enter Password	
	Submit

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.

In order to enh	ance security	on the site, DHCS is requiring all
users to enter a	a four digit us	er passkey.
Enter 4 digit User	Passkey*	
Insert	0	
Retype 4 digit Use	r Passkey *	
Insert	•	
Make sure you need this in the desk, and for s	remember yo e future in oro ecurity and vo	our four digit user passkey. You will der to reset your passwords with help erification.

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.

4y Profile and Preferen	ces	Edit	Transaction Center	Administration	Macage Users
lame: Organization: Role:	TEST SUB ORG NAME 0004 Submitter - Admin	15	Submitter ID: AAS	<b>2</b> Users	<b>1</b> Org Admins
mail: Ausiness Phone: Aobile Phone: Submitter ID:	AAS		Get Started	Tip: Add users to your organ their pe Di	ID A USER nizations account and manage smissions. smiss
rovider Network		View All		Notifications	View All
ending Requests Sent, 1 Received		>			
anage Provider Network		>		No new n	otifications
ubmitter Directory Profile idit My Information	View Requests	>			
ransaction Testing			ViewAll		
ransaction.Type	Status	Date Of Completion	You must be approved for testing prior to submitting		
270	Not Started		claims on behalf of a provider. Only transaction types that pertain to your provider are required. All		
837	Not Started		other transaction types are optional, and may be tested at any time.		

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.

Account Status:	mana their permissions.	$\odot$	
Pending approval - limited access Submit affilia	ion request(s) Complete transaction testing	Receive provider approval Vie	w Requests

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.