HealthAxis Group

Provider Portal Manual

for

healthteam advantage[SM]

Local. Reliable. Accessible.

Table of Contents

Provider Portal 3.0

The Provider Portal, powered by HealthAxis is used by Beacon Health Solutions, the third-party administrator for Care n' Care of North Carolina's products: HealthTeam Advantage and Teal Premier.

This portal is a quick resource that allows Providers convenient access to member benefits and eligibility details and claim information.

How to Access the Provider Portal

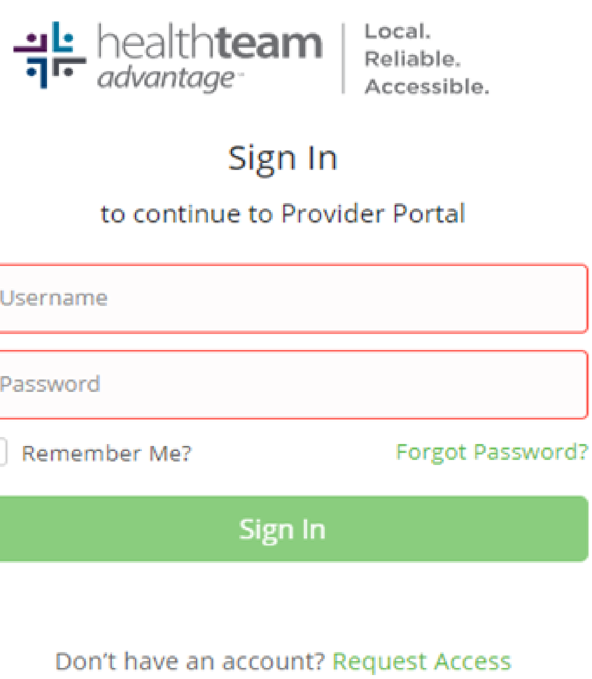
Enter the following link.

Link:

https://htaprovider.prod.healthaxis.net/login

Note: The Provider Portal cannot be accessed through Internet Explorer, users must use Chrome.

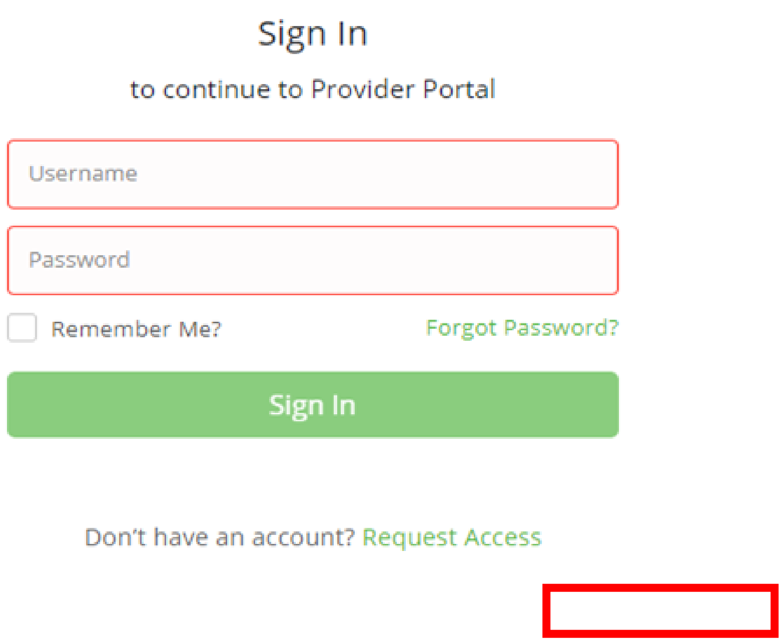
- **ONLY the provider/practice/vendor administrator should request access. Individual staff members will be provided access by their provider/practice/vendor administrator. Any individual staff members that request access individually, will be denied.**



Login credentials:

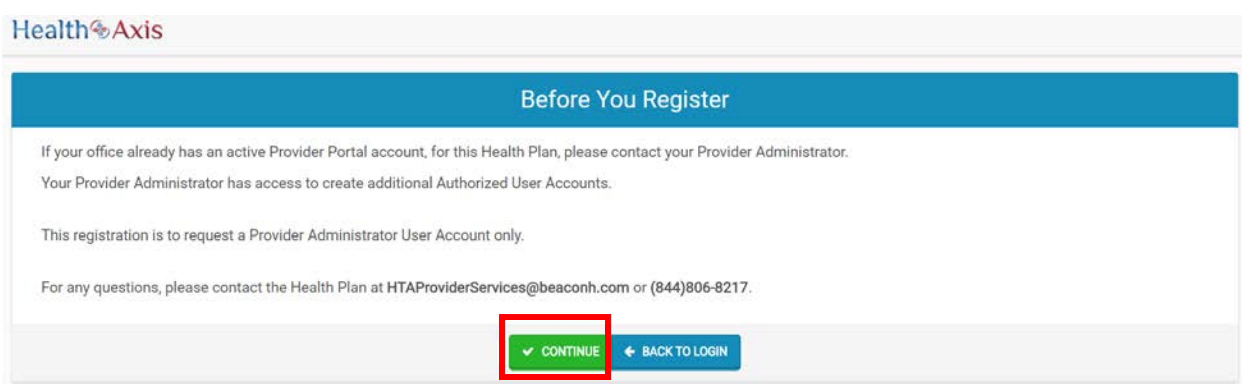
Should be emailed to you or provided by your supervisor or Systems Administrator

How to Request Access to the Provider Portal

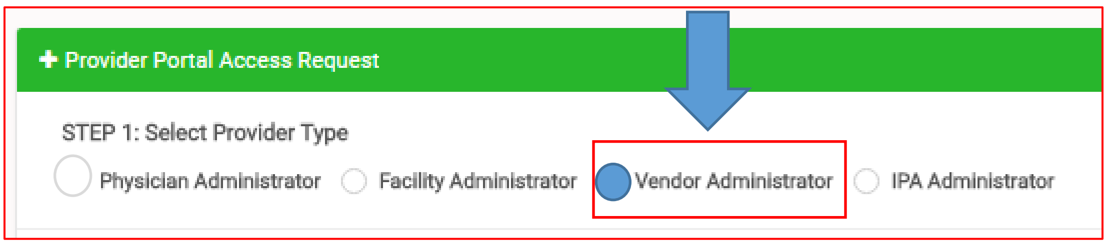


Click the "Request Access" button and the screen below will be displayed. Select "Continue" to proceed. Selecting "Back to Login" will return to the log-in page.

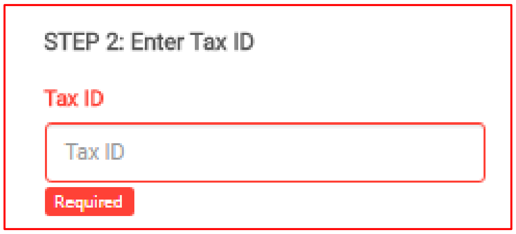
- NOTE: **ONLY the provider/practice/vendor administrator should request access. Individual staff members will be provided access by their provider/practice/vendor administrator. Any individual staff members that request access individually, will be denied.**

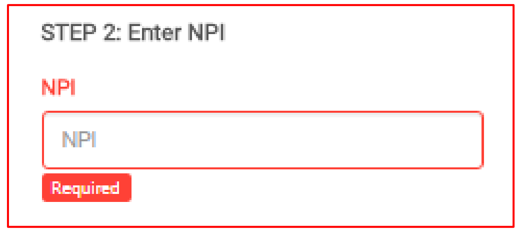


Selecting “Continue” will display the Provider Portal Access Request Form. New provider admin users should request access to the Provider Portal using this form. Fill all the details in the form and submit request to plan administrator. Each of the provider admins will have ability to create “User” accounts. NOTE: There are four possible user types, but vendor administrator is the option you should choose.

Provider Portal Access Request Screen	
Field Names	**Select Provider Type Section – Field Descriptions**
 	
Vendor Administrator/Group Administrator	**The Vendor Administrator** radio button should be selected for Vendor Group/Physician Group Practice Administrator level access. This user type will have access to all member information associated with all the physicians under the group practice. This user can also determine roles within the practice, and create/update/manage all portal users at their practice.
Facility Administrator	**Do Not Use: Facility Administrator** radio button should be selected for Facility/Hospital Administrator level access.
Physician Administrator	**Do Not Use: Physician Administrator** radio button should be selected for setting up an individual provider their own level access. This user type will have access to information limited to their members only.
IPA Administrator	**Do Not Use: IPA Administrator** radio button should be selected for IPA Administrator level access.

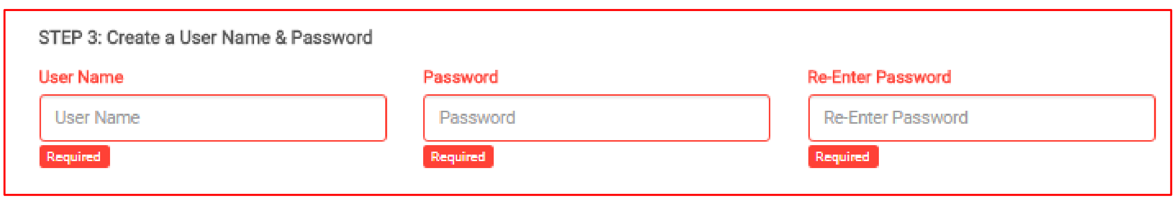
Field Names	Enter Tax ID or NPI Section – Field Descriptions



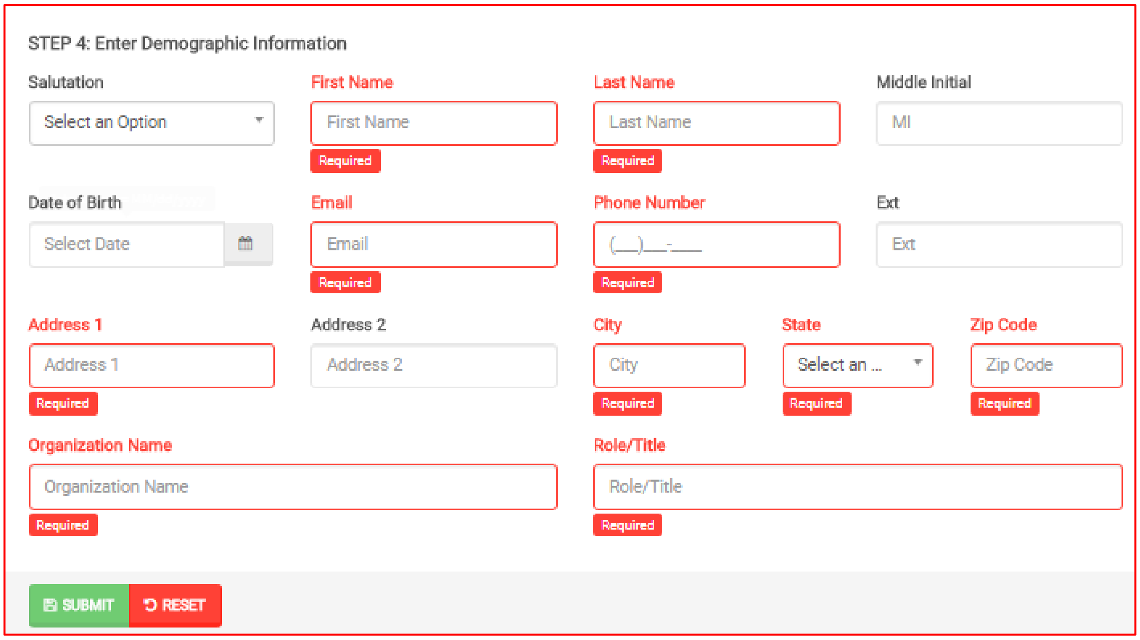


Tax ID	In the **Tax ID** field, enter the appropriate Tax Identification Number; this field is displayed for Vendor Administrators or IPA Administrators only. Note: System will validate the TIN is in HAX system. If not found, it will display notification: “Tax ID doesn’t exist in the system.
NPI	In the **NPI** field, enter the appropriate NPI (National Provider Identifier) number; this field is displayed for Physician Administrators and Facility Administrators only. Note: System will validate the NPI is in HAX system. If not found, it will display notification: “NPI doesn’t exist in the system.”

Field Names	Create a User Name & Password Section – Field Descriptions



User Name	In the **User Name** field, create a user name, containing five or more alphanumeric characters. Note: System will trigger notification “Enter different User Name” if the user name entered is already in use.
Password	In the **Password** field, create a password containing a minimum of six characters to include: 1 Uppercase, 1 Lowercase, 1 Numeric, and 1 Special Character.
Re-Enter Password	In the **Re-Enter Password** field, type in the password exactly as it was entered in the password field. Note: System will trigger notification “Value should match password” if there is a discrepancy between the two password fields.



Field Names	Enter Demographic Information Section – Field Descriptions
Salutation	Select an optional **Salutation** for the user from the drop-down list values.
First Name	Enter **First Name** of the user. Note: Required field.
Last Name	Enter **Last Name** of the user. Note: Required field.
Middle Initial	Enter **Middle Initial** of the user, if applicable.
Date of Birth	The **Date of Birth** allows the user to enter the correct birth date by either using the calendar, or manually entering the date in the following format: MM/DD/YYYY.
Email	Enter an **Email Address** for the user. Note: Required field.
Phone Number	Enter a **Phone Number** for the user. Note: Required field.
Ext	Enter an extension for the user's phone number, if applicable.
Address 1	Enter the user's **Address**. Note: Required field.
Address 2	Continue entering **Address** from Address 1 field, if applicable.
City	Enter the **City** into the field. Note: Required field.
State	Select the **State** from the drop-down list. Note: Required field.
Zip Code	Enter a valid **Zip Code**. Note: Required field.
Organization Name	Enter the **Organization Name** into this field. Note: Required field.
Role/Title	Enter the user's **Role** or **Title** into this field. Note: Required field.
Submit	Select **Submit** when all required fields are completed.
Reset	Select **Reset** to clear the fields and re-start the form.

Once the Administrator submits a request, a popup window as shown below will be displayed stating that your request has been submitted. The user will receive an email notification, once the Administrator approves their User Access.

**** Be sure to check that this notification did not go into a junk/spam email folder.****

NOTE: An activated user login stays current for 60 days. If after 60 days, there has not been a log in, the system will automatically deactivate the user.

User Types Hierarchy

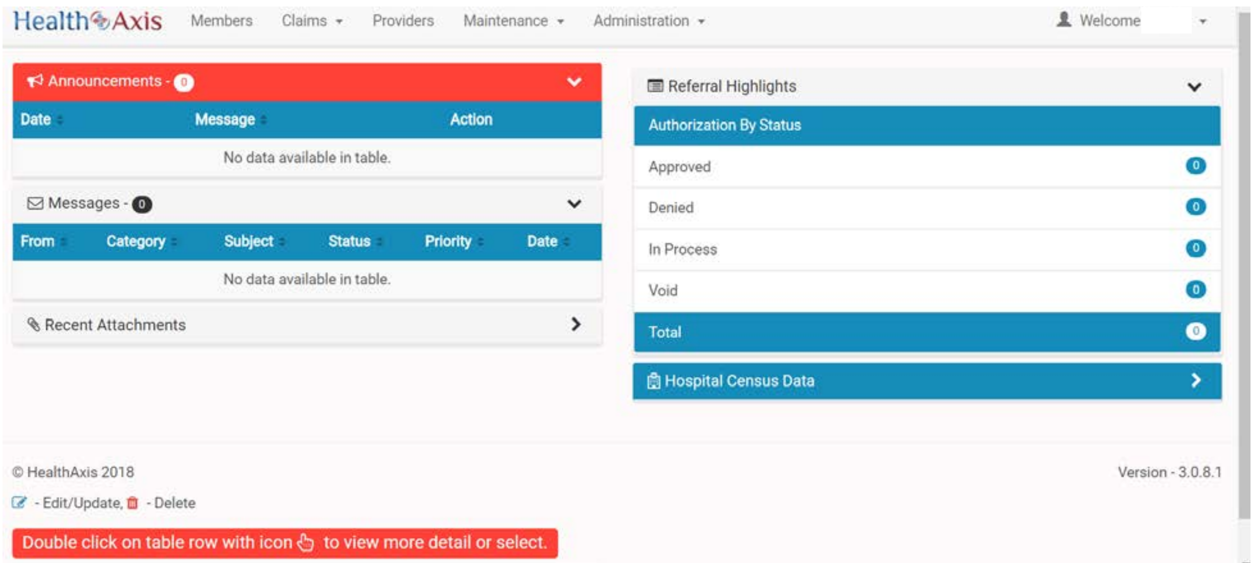
1. **Vendor Administrator is for a practice, provider, facility or ancillary provider)** – There can only be one (1) Administrator per NPI/Tax ID. Only the Administrator can complete the Request Access Form (login screen).

2. **Vendor Authorized Users (can be set up for billing staff, front office staff, providers, etc.)** – These are individual staff members that the administrator creates and approves access for.

Dashboard

The Dashboard is the landing page displayed once the user logs into the portal. The dashboard gives the user an overview of Announcements, Messages, and Recent Attachments.

Please note screenshots provided may show additional portal functions that are not active at this time.

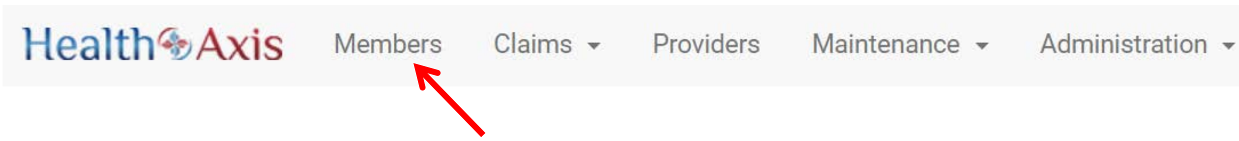


Members Module

The Member Module allows users with specific access to search and view member details for benefits, eligibility and claims level details.

Accessing the Member Module

Once logged into the system, select Members from the dashboard.

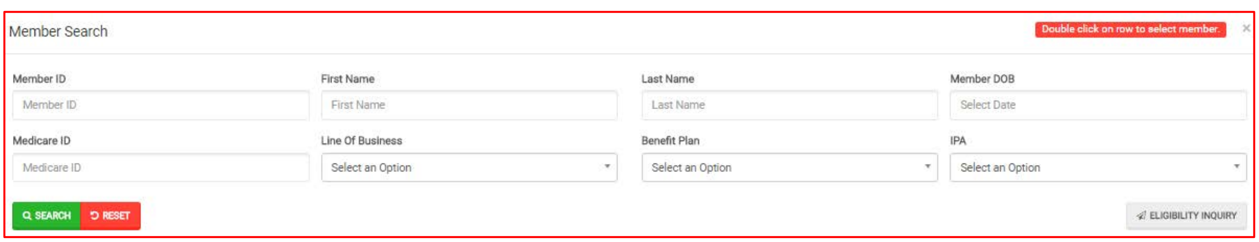


Member Search

Upon selecting "Members," the Member Search popup window will display. Users may search for members based on the filters provided in the following table.
However, the member search results are dependent on the user roles:

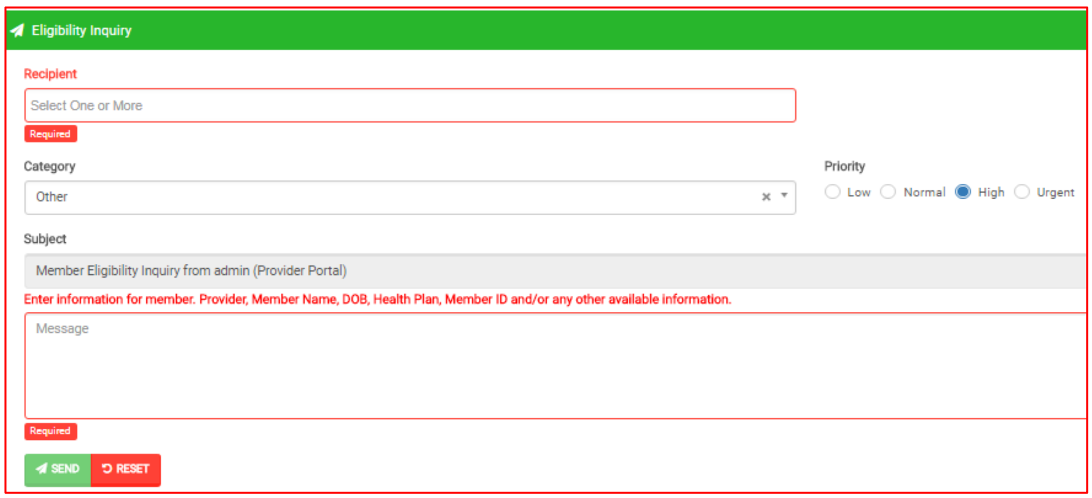
- User – Admin: Can view all active members
- User – Provider: Can view members that are tied to the PCP or can search by Member ID and other available criteria.
- User – Facility/Vendor: Can search for all members but will need to enter Member ID and DOB or Medicare ID number.

Member Screen



Field Names	Member Search Section – Field Descriptions
Member ID	The **Member ID** allows users to enter the Member's ID number.
First Name	The **First Name** field allows users to enter the member's First Name.
Last Name	The **Last Name** field allows users to enter the member's Last Name.
Member DOB	The **Member DOB** date field allows users to select the Member's DOB using the calendar feature or by manually keying the member's DOB in as follows: MM/DD/YYYY
Medicare ID	The **Medicare ID** field allows users to enter the Medicare Beneficiary Identifier (MBI) as part of the search criteria.

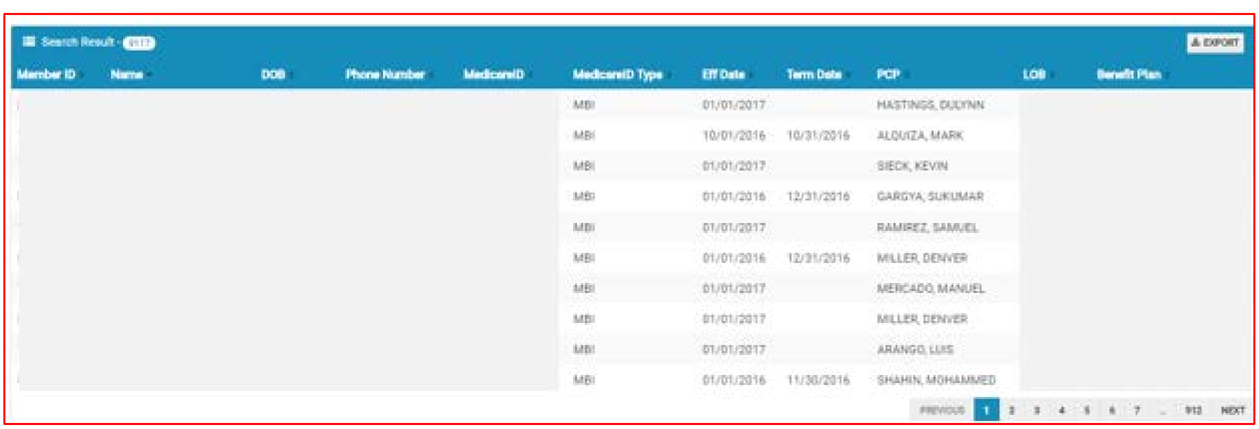
Line of Business	The **Line of Business** field allows users to narrow the member search by selecting a line of business from the dropdown list.
Benefit Plan	The **Benefit Plan** field allows users to narrow the member search by selecting a benefit plan from the dropdown list.
IPA	The **IPA** field allows users to narrow the member search by selecting an IPA from the dropdown list.
Search	The **Search** button allows users to launch the search functionality, based on criteria selected. The results will populate below the search section.
Reset	The **Reset** button allows users to clear all data from the fields prior to saving.
Eligibility Inquiry	The **Eligibility Inquiry** button allows users to send an inquiry requiring a member's eligibility. Upon clicking the eligibility inquiry button, the eligibility inquiry screen will appear as seen below:



Users can enter the recipient, category, priority and message. Upon clicking the send button, the inquiry will be sent to the recipient entered.

Member Search Screen

Field Names	Member Results Section – Field Descriptions



Search Results	The **"Search Results"** heading tells the users how many records are displayed in the results table.
Export	The **Export** button allows the user to export the results data into an Excel format.
Results Table	The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header.
Member ID	The **Member ID** hyperlink allows the user to open and view the Member Details.

Member Information

Upon double clicking on the selected member from the grid, the member information will populate into the member information screen. The user can now view the Member's Information, Current Coverage, Coverage History, IPA/PCP Information, and Coordination of Benefits.

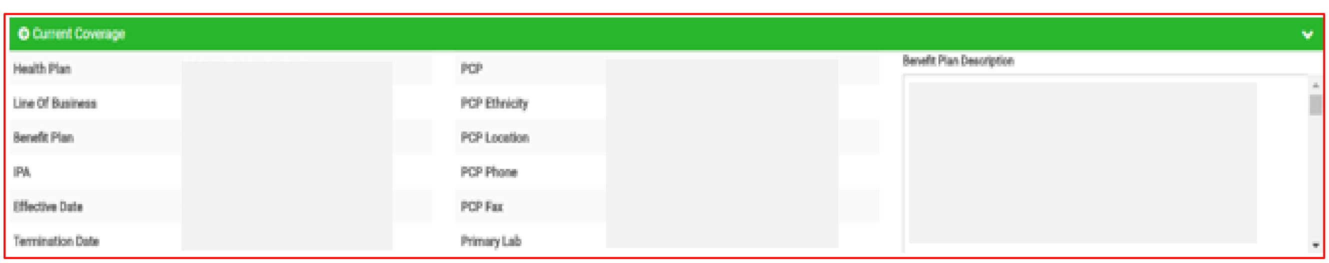
Member Information Screen

Member Information Section

The **Member Information** section allows users with specific access to view all active members' demographic information. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited.

Member Information Screen

Current Coverage Section



The **Current Coverage** section allows users with specific access to view all active members' coverage. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited.

Member Information Screen

Coverage History Section

Coverage History

Health Plan	Line Of Business	Benefit Plan	Benefit Plan ID	Effective Date	Term Date	Status
				01/01/2017		Activated
				01/01/2016	12/31/2016	History
				01/01/2015	12/31/2015	History

The **Coverage History** section allows users with specific access to view all active members' coverage history. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited.

Member Information Screen

IPA/PCP History Section

IPAPCP History

IPA Eff Date	IPA Term Date	IPA	PCP Eff Date	PCP Term Date	PCP ID	PCP Name	Status
			01/01/2015			HASTINGS, DULYNN	Activated

The **Coverage History** section allows users with specific access to view all active members' coverage history. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited.

Member Information Screen

Coordination of Benefits Section

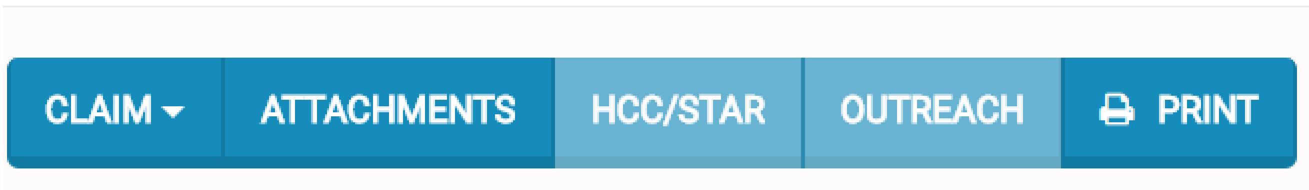
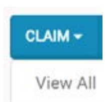
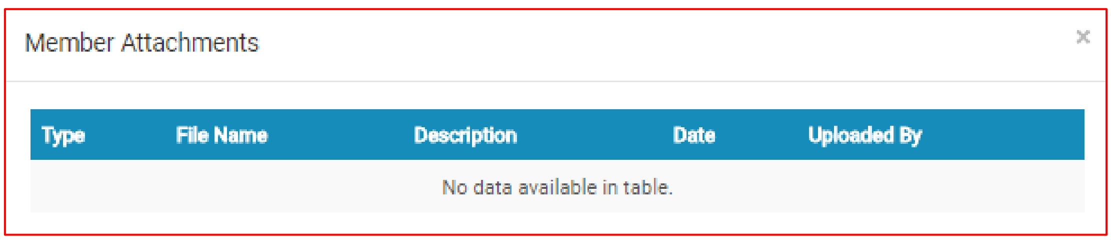
Coordination of Benefits

Policy Number	Plan Name	Type	Plan Group	Eff Date	Term Date	Verified	MSP Code
No data available in table.							

The **Coordination of Benefits** section allows users with specific access to view all active members' COBs. This information is auto-populated from the HAX 2.5 Claims system and cannot be edited.

Action Buttons

The Action Buttons at the top of the Member Information screen allows users to perform various tasks within the member information screen.

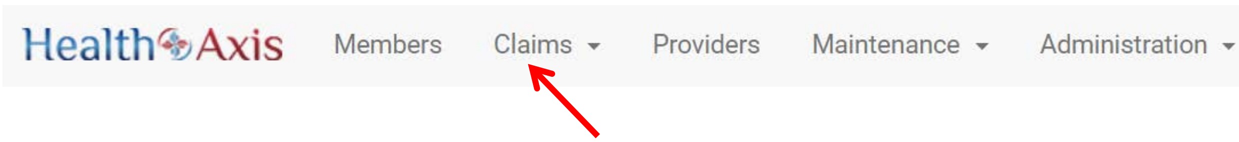
Member Information Screen	
Field Names	**Action Buttons – Field Descriptions**
	
Claim	The **Claim** button allows users to view all claims tied to the selected member. Choices are: 
Attachments	The **Attachments** button allows users to view/download all attachments tied to the selected member. Upon clicking the attachment button, the following popup window will appear. 
HCC/Star	Future enhancement.
Outreach	Future enhancement.
Print	The **Print** button allows users to print the member information screen.

Claims Module

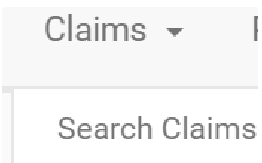
The Claims Module allows users to search claims using specific search criteria.

Accessing the Claims Module

Once logged into the system, select Claims from the dashboard.

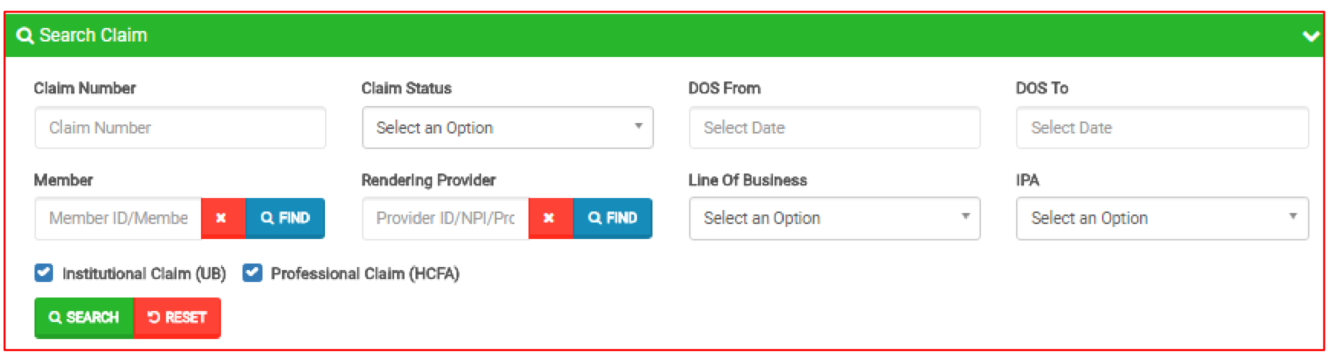


The dropdown list for the Claims Module contains the following selections:



Search Claims

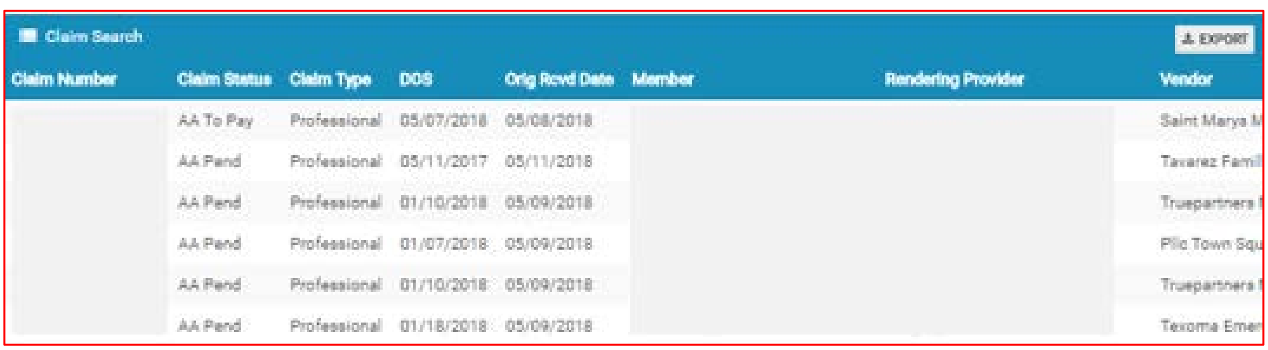
Upon clicking the Claims Module, the Search Claim Popup Window will appear.

Claim Screen	
Field Names	**Search Claim Section – Field Descriptions**
	
Claim Number	The **Claim Number** field allows the user to enter the claim number as part of the search criteria.
Claims Status	The **Claims Status** dropdown list allows users to select the claim status from the dropdown list as part of the search criteria.
DOS From	The **DOS From** field allows users to select the date of service from using the calendar feature or by manually keying the date in as follows: MM/DD/YYYY

DOS To	The **DOS To** field allows users to select the date of service to using the calendar feature or by manually keying the date in as follows: MM/DD/YYYY
Member	 The **Member** field allows the user to enter the member's name (Last Name, First Name) or click the Find button (shown to the left) to select the member from the Member Search popup window as part of the search criteria.
Rendering Provider	 The **Rendering Provider** field allows users to enter the name of the rendering provider (Last Name, First Name) or click the Find button (shown to the left) to select the provider from the Provider Search popup window as part of the search criteria
LOB	The **LOB** dropdown list allows users to select the LOB as part of the search criteria.
IPA	The **IPA** dropdown list allows users to select the IPA as part of the search criteria.
Institutional Claim	The **Institutional Claim** check box allows users to select only institutional claims as part of the search criteria.
Professional Claim	The **Professional Claim** check box allows users to select only professional claims as part of the search criteria.
Search	The **Search** button allows users to launch the Claim Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected. **Note: Clicking Search with no search criteria will return all results.**
Reset	The **Reset** button allows users to clear all data from the fields prior to saving.

Claim Screen

Field Names	Claims Results Section – Field Descriptions



Claim Search — EXPORT

Claim Number	Claim Status	Claim Type	DOS	Orig Rcvd Date	Member	Rendering Provider	Vendor
	AA To Pay	Professional	05/07/2018	05/08/2018			Saint Marys M
	AA Pend	Professional	05/11/2017	05/11/2018			Tavarez Famil
	AA Pend	Professional	01/10/2018	05/09/2018			Truepartners I
	AA Pend	Professional	01/07/2018	05/09/2018			Pllc Town Squ
	AA Pend	Professional	01/10/2018	05/09/2018			Truepartners I
	AA Pend	Professional	01/18/2018	05/09/2018			Texoma Emer

Export	The **Export** button allows the user to export the results data into an excel format.
Results Table	The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header.
Claim Number	The **Claim Number** hyperlink allows the user to open and view the claim details.

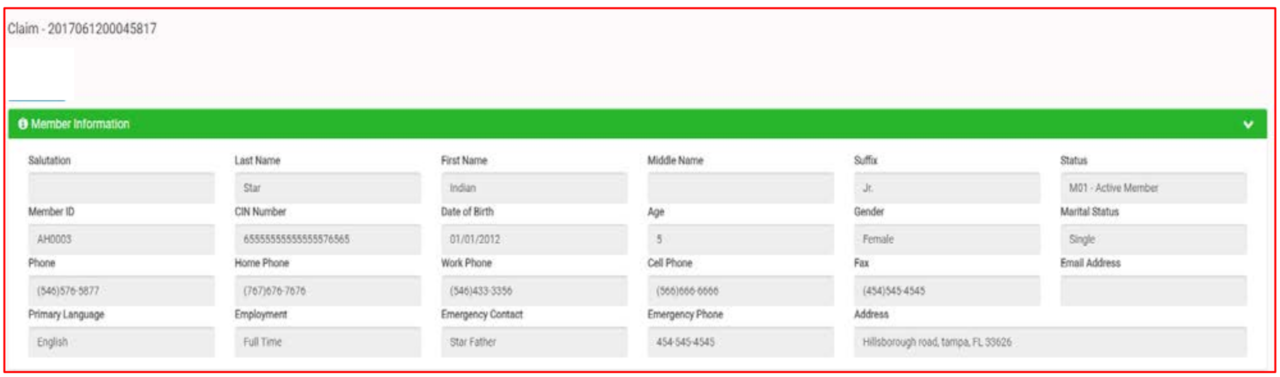
Claims Information

Claims Review Screen
Upon double clicking on the selected claim from the grid, the claim review screen will be displayed. The user will be allowed to view the details of the member's claim selected.

The claims review screen consists of the following collapsible sections: member's information, member's current coverage, claim header, provider or facility information, claim process detail, claim details, coordination of benefits, attachments, authorization information, anesthesia, ambulance, and check details.

Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.

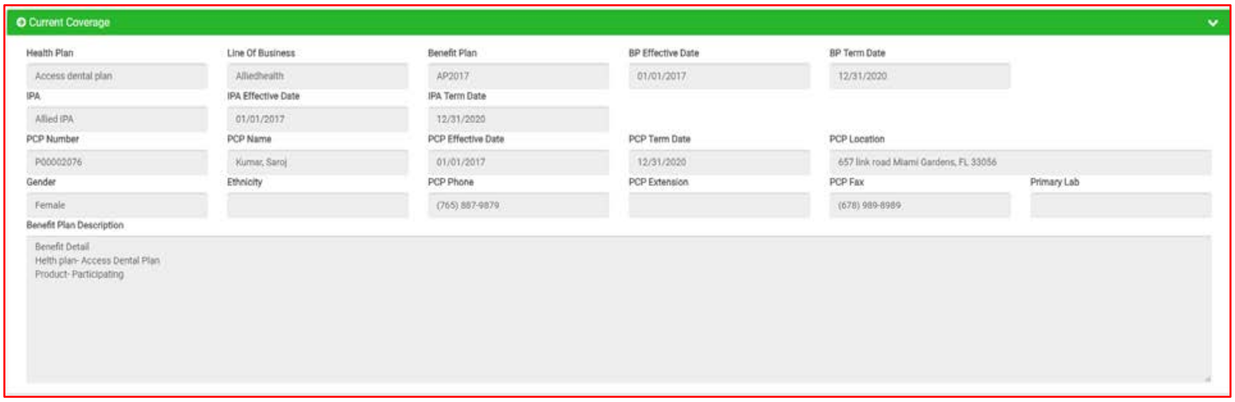
Claims Review Screen	
	Member Information Section



The member information section allows users to view the member's demographic information.

Claims Review Screen

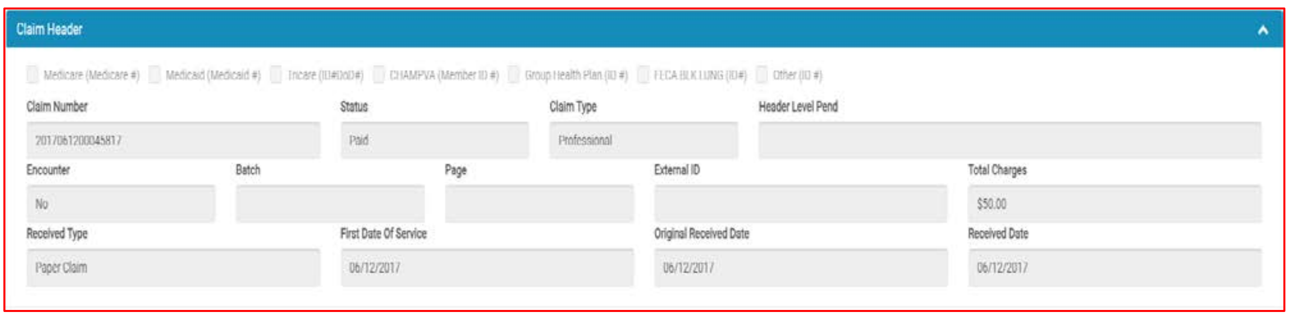
Current Coverage Section

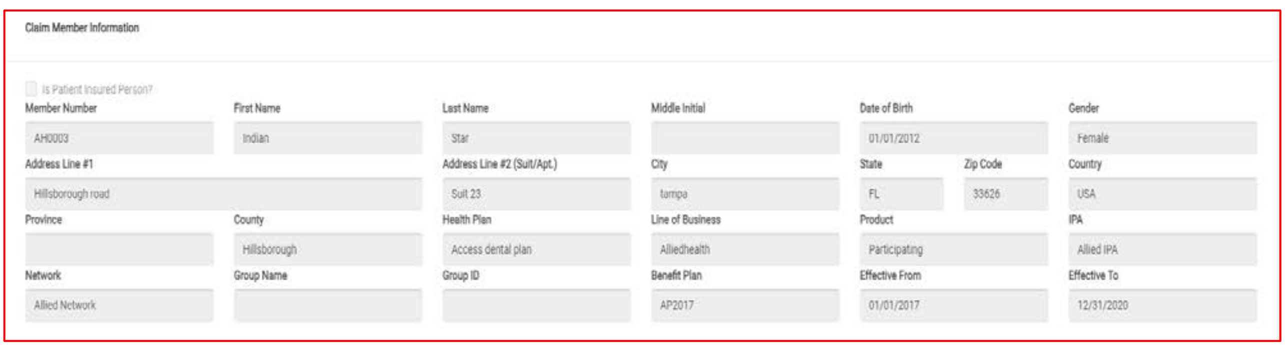


The Current Coverage Section allows users to view the member's current coverage details.

Claims Review Screen

Claim Header Section

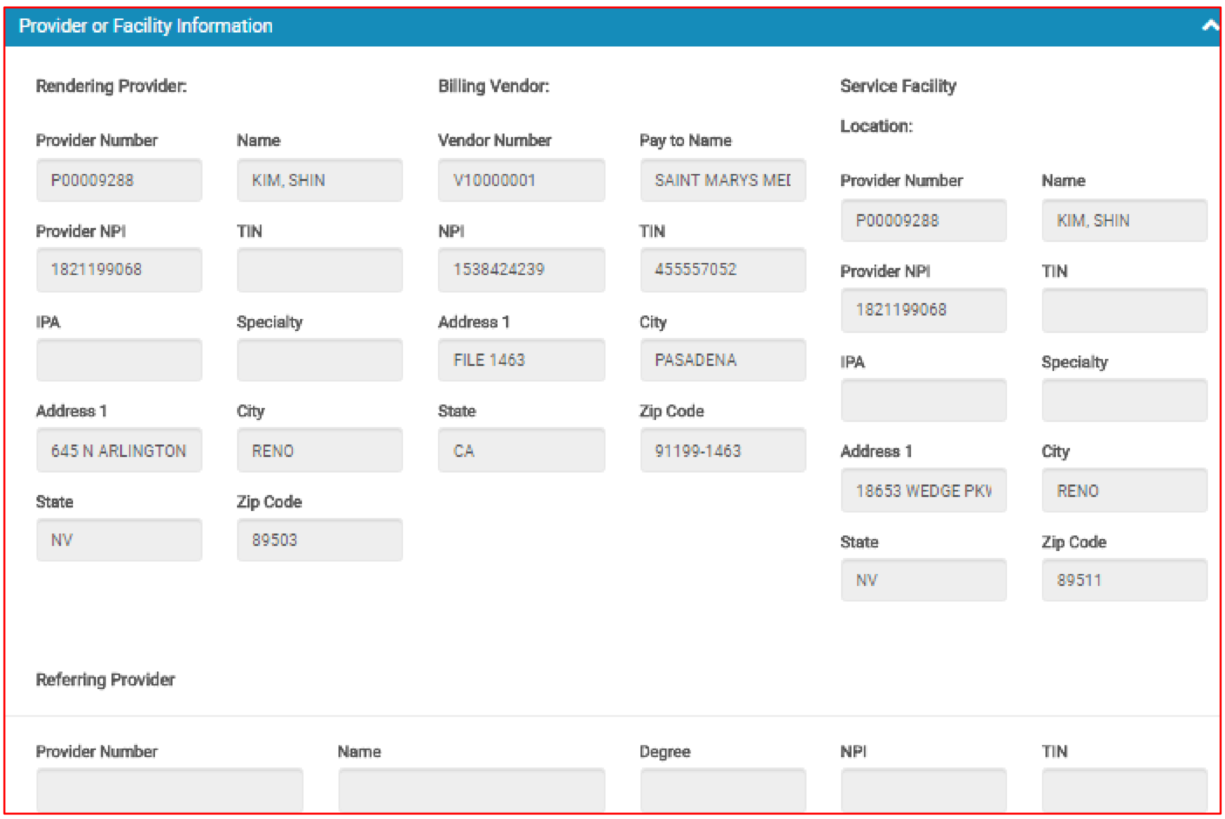




The **Claim Header** section allows the users to view the Claim Member's Summary, the Claim Member's Information, and the Claim Member's PCP Information.

Claims Review Screen

Provider or Facility Information Section



The **Provider or Facility Information** section allows users to view the rendering and referring provider/facility information of the member's claim.

Claims Review Screen

Claim Process Detail Section

Claim Line Items

	Status	Svc From	Svc To	CPT	Mod1	Mod2	Mod3	Mod4	POS	ICD Dx	QTY	Freq Type	Billed	Allowed	Adjusted	Prim
1	Approved	05/07/2018	05/07/2018	77067	TC				49	A	1	Unit	$311.50	$103.21	$0.00	$0.0
Reason		F0001 - PAYMENT BASED ON FEE SCHEDULE														
2	Approved	05/07/2018	05/07/2018	77080	TC				49	B,C	1	Unit	$127.00	$32.91	$0.00	$0.0
Reason		F0001 - PAYMENT BASED ON FEE SCHEDULE														
												Total	$438.50	$136.12	$0.00	$0.0

The **Claim Line Items** section allows the users to view the details of a processed claim.

Claims Review Screen

Claim Details Section

Claim Details

Is Patient's Condition Related To:

Employment Accident? No

Auto Accident? No

Other Accident? No

Asg Ben: Yes

Rel Info: Yes

Patient Account Number

Patient Status

Reserved For NUCC Use

Additional Claim Info+

Reserved For Local Use

Date of Current Illeness, Injury, or Pregnancy (LMP)

Dates Patient Unable to work in current occupation

From: To:

Hospitalization dates related to current services

From: To:

Outside Lab? No

Lab Charges: $0.00

Resubmission Code

Origional Ref No.

The **Claim Details** section contains two sub sections: Claim Codes and DX Codes. The Claim Details section allows users to view the member's claim detail information, along with the claim codes and dx codes on the claim.

Claim Codes 0

Dx Codes 2

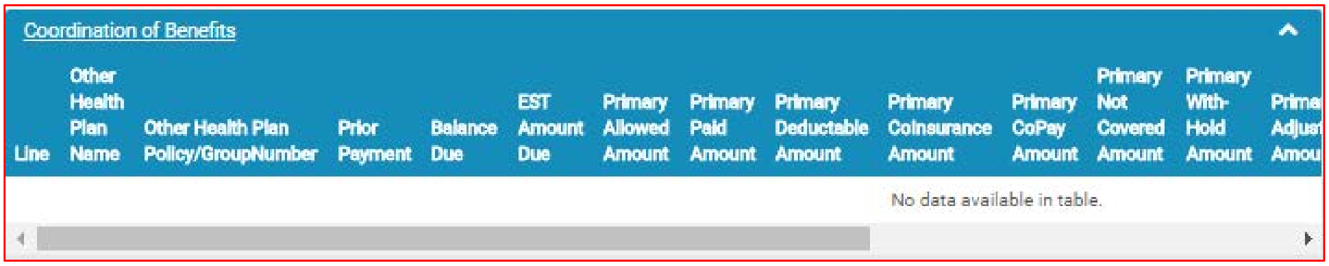
ICD 9 ICD 10

DX A: Z51.81 - Encounter for therapeutic

DX B: I48.91 - Unspecified atrial fibril

Claims Review Screen

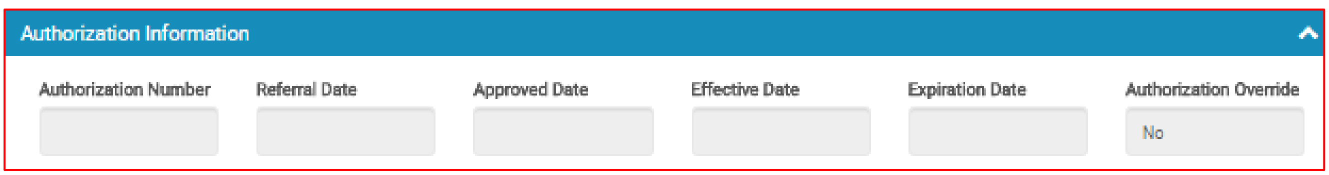
Coordination of Benefits Section



The **Coordination of Benefits** section allows users to view COB’s on the member’s claim.

Claims Review Screen

Authorization Information Section



The **Authorization Information** section allows users to view authorization information on the member’s claim.

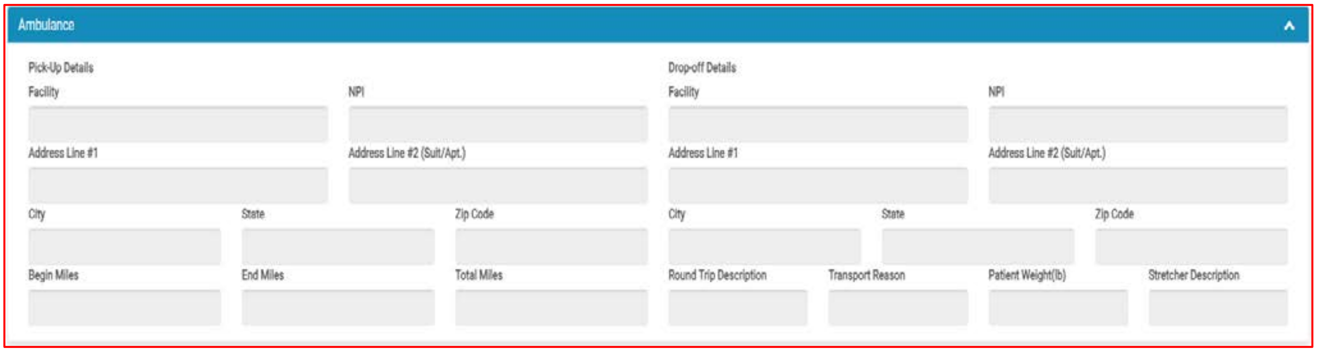
Claims Review Screen

Anesthesia Section

The **Anesthesia** section allows users to view anesthesia information on the member’s claim.

Claims Review Screen

Ambulance Section



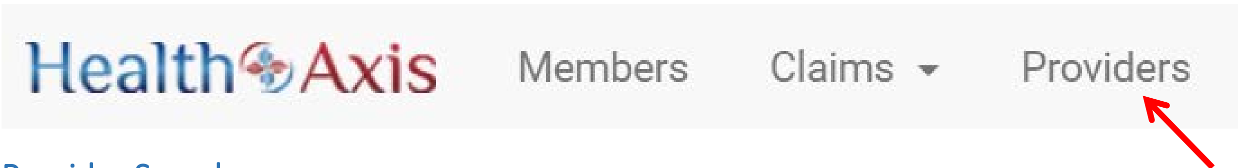
The **Ambulance** section allows users to view ambulance information on the member's claim.

Providers Module

The Provider Module allows users search providers using specific search criteria.

Accessing the Providers Module

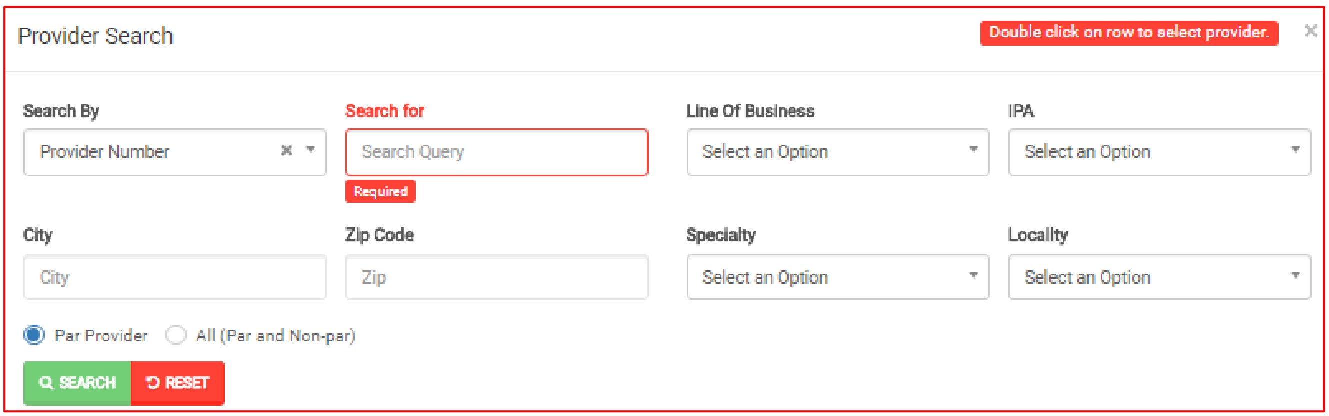
Once logged into the system, select Providers from the dashboard.



Provider Search

Upon clicking the Provider Module, the Provider Search Popup Window will appear.

Provider Search Screen

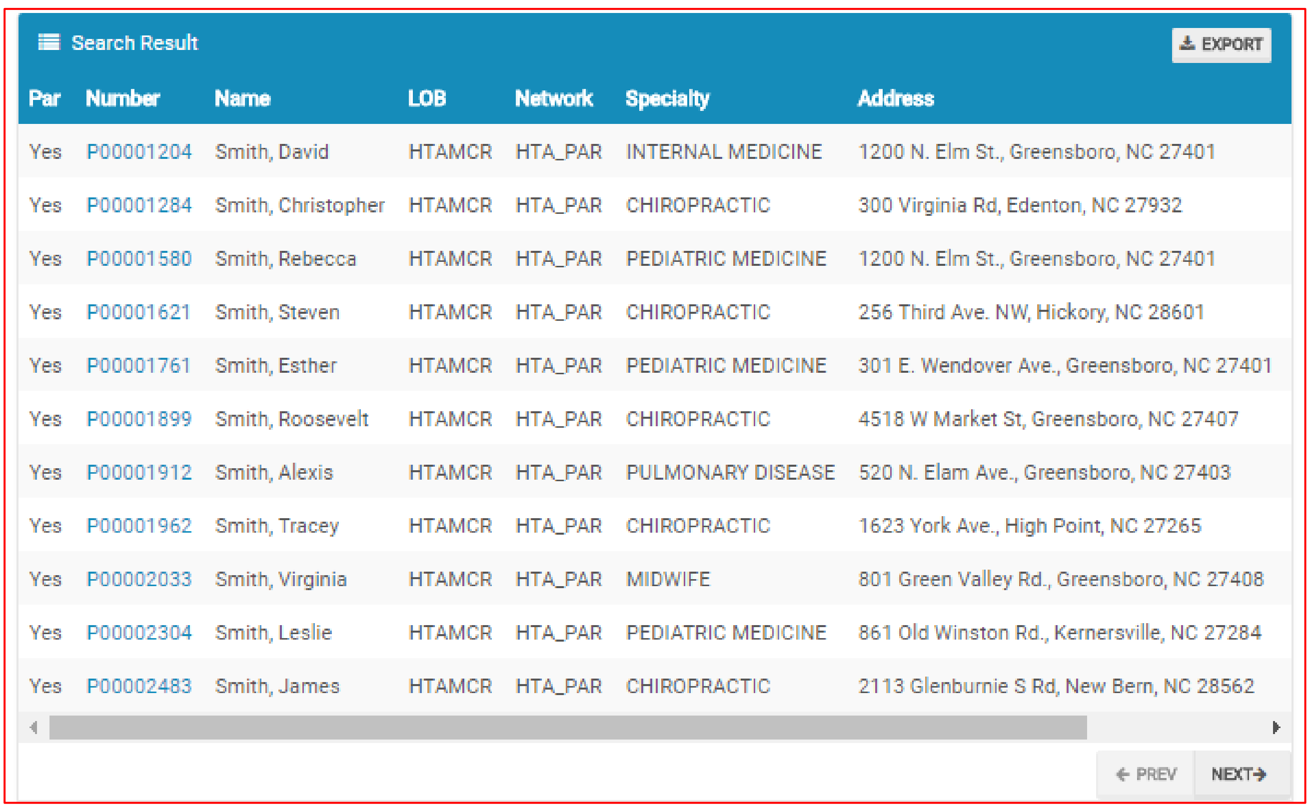


Field Names	Provider Search Section – Field Descriptions
Search By	The **Search By** field contains a dropdown list that can be utilized to narrow down a search to only display providers with specific criteria. Choices are: Any Name, Last Name, First Name, TIN, NPI, Provider Number and Organization Name.
Search For	The **Search For** fields corresponds to the selection chosen in the *Search By* field. **EX: Smith** ***NOTE: An entry is required in this field, if a selection is made in the "Search By" field.***
Line of Business	The **Line of Business** dropdown list allows users to select a LOB as part of the search criteria.
IPA	The **IPA** dropdown list allows users to select an IPA as part of the search criteria.
City	The **City** field allows users to enter the city as part of the search criteria.
Zip Code	The **Zip** Code field allows users to enter the zip code as part of the search criteria.

Specialty	The **Specialty** dropdown list allows users to select a specialty as part of the search criteria.
Locality	The **Locality** dropdown list allows users to select a locality as part of the search criteria.
Par Provider	The **Par Provider** radio button allows users to select only Par providers as part of the search criteria.
All (Par and Non-par)	The **All** radio button allows users to select both Par and Non-Par providers as part of the search criteria.
Search	The **Search** button allows users to launch the Provider Search functionality based on the criteria selected. The results table will populate below with the respective data fields selected. **Note: Clicking Search with no search criteria will return all results.**
Reset	The **Reset** button allows users to clear all data from the fields prior to saving.

Provider Search Screen

Field Names	Provider Results Section – Field Descriptions



Search Result EXPORT

Par	Number	Name	LOB	Network	Specialty	Address
Yes	P00001204	Smith, David	HTAMCR	HTA_PAR	INTERNAL MEDICINE	1200 N. Elm St., Greensboro, NC 27401
Yes	P00001284	Smith, Christopher	HTAMCR	HTA_PAR	CHIROPRACTIC	300 Virginia Rd, Edenton, NC 27932
Yes	P00001580	Smith, Rebecca	HTAMCR	HTA_PAR	PEDIATRIC MEDICINE	1200 N. Elm St., Greensboro, NC 27401
Yes	P00001621	Smith, Steven	HTAMCR	HTA_PAR	CHIROPRACTIC	256 Third Ave. NW, Hickory, NC 28601
Yes	P00001761	Smith, Esther	HTAMCR	HTA_PAR	PEDIATRIC MEDICINE	301 E. Wendover Ave., Greensboro, NC 27401
Yes	P00001899	Smith, Roosevelt	HTAMCR	HTA_PAR	CHIROPRACTIC	4518 W Market St, Greensboro, NC 27407
Yes	P00001912	Smith, Alexis	HTAMCR	HTA_PAR	PULMONARY DISEASE	520 N. Elam Ave., Greensboro, NC 27403
Yes	P00001962	Smith, Tracey	HTAMCR	HTA_PAR	CHIROPRACTIC	1623 York Ave., High Point, NC 27265
Yes	P00002033	Smith, Virginia	HTAMCR	HTA_PAR	MIDWIFE	801 Green Valley Rd., Greensboro, NC 27408
Yes	P00002304	Smith, Leslie	HTAMCR	HTA_PAR	PEDIATRIC MEDICINE	861 Old Winston Rd., Kernersville, NC 27284
Yes	P00002483	Smith, James	HTAMCR	HTA_PAR	CHIROPRACTIC	2113 Glenburnie S Rd, New Bern, NC 28562

PREV NEXT

Search Results	The **Search Results** heading tells the users how many records are displayed in the results table.
Export	The **Export** button allows the user to export the results data into an excel format.
Results Table	The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header.

Previous	The **Previous** button allows user to return to the previous page of the search results.
Next	The **Next** button allows user to skip to the next page of the search results.
Edit Pencil	The **Edit (Blue) Pencil** allows the user to open and view the message details.

Provider Information

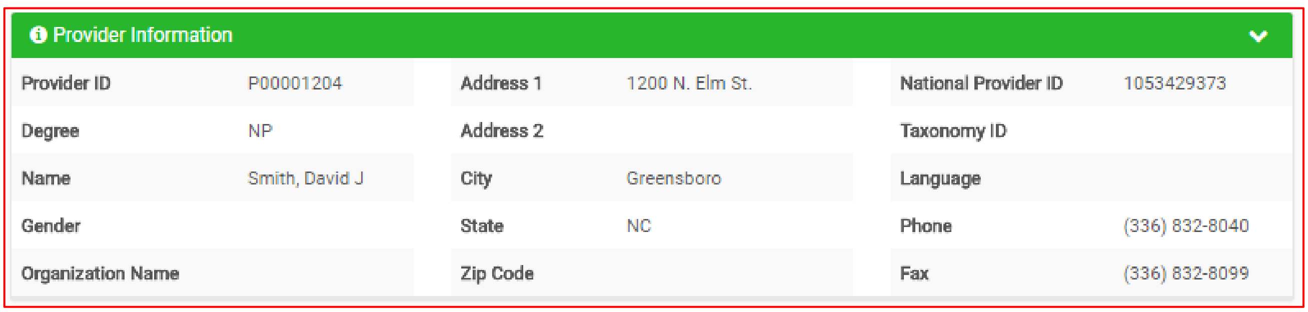
Provider Information Screen

Upon double clicking on the selected provider from the grid, the provider information will populate into the provider information screen. The user can now view the Provider Information and the Provider Assignment Details.

Note: Each section can be collapsed for easier viewing. This section is for review only, users will not be allowed to edit.

Provider Information Screen

Provider Information Section



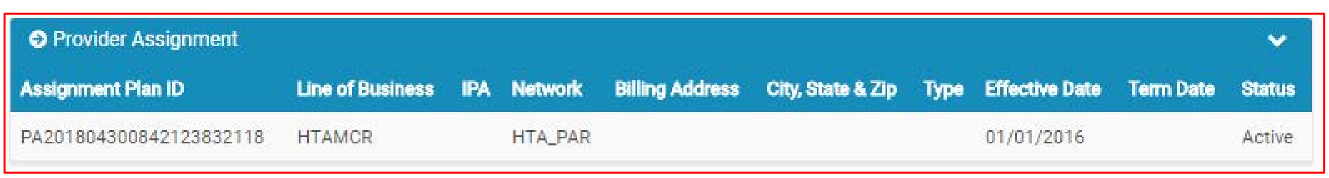
Provider Information

Provider ID	P00001204	Address 1	1200 N. Elm St.	National Provider ID	1053429373
Degree	NP	Address 2		Taxonomy ID	
Name	Smith, David J	City	Greensboro	Language	
Gender		State	NC	Phone	(336) 832-8040
Organization Name		Zip Code		Fax	(336) 832-8099

The Provider Information section allows the users to view the demographics of the Provider.

Provider Information Screen

Provider Assignment Section



Provider Assignment

Assignment Plan ID	Line of Business	IPA	Network	Billing Address	City, State & Zip	Type	Effective Date	Term Date	Status
PA20180430084212383211 8	HTAMCR		HTA_PAR				01/01/2016		Active

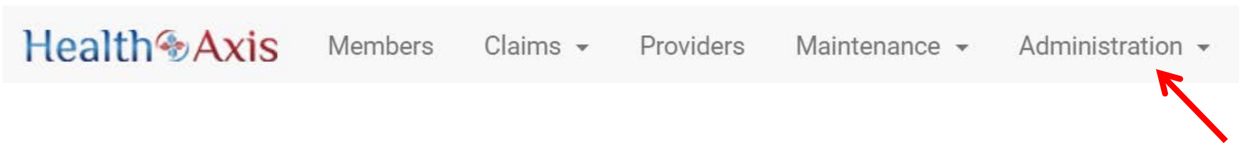
The Provider Assignment section allows users to view the provider assignment plans.

Administration

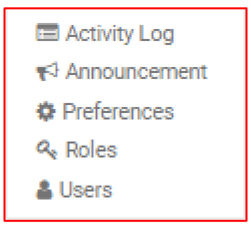
The administration module allows users with administrative privileges to manage user accounts in the Provider Portal. The user will have access to create, terminate or update a user level account details.

Accessing the Administration Module

Once logged into the system, select Administration dropdown list from the dashboard.

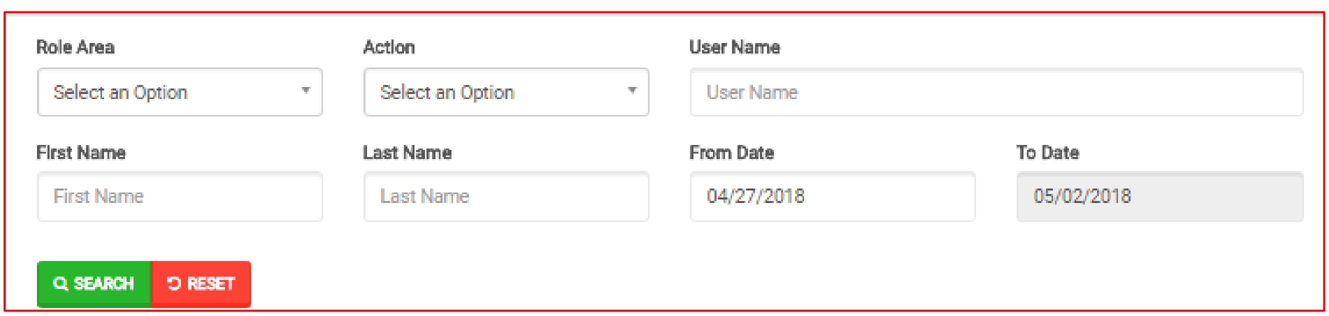


The dropdown list for Administration Module contains the following selections:



Activity Log

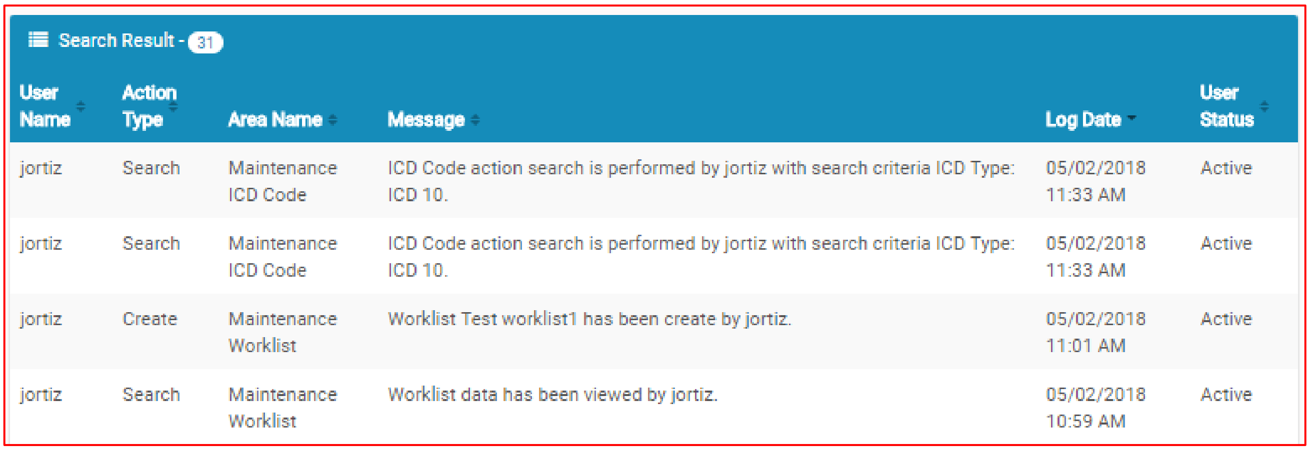
Administrators have full access to view activities through the Activity Log feature.

Administration Activity Log Screen	
Field Names	**Activity Log Search Section – Field Descriptions**
	
Role Area	The **Role Area** dropdown list allows users to select the module or section of the provider portal to include as part of the search criteria.
Action	The **Action** dropdown list allows users to select the type of action to include as part of the search criteria.
User name	The **User Name** field allows users to enter a username as part of the search criteria.

First Name	The **First Name** button allows users to enter the user's first name as part of the search criteria.
Last Name	The **Last Name** button allows users to enter the user's last name as part of the search criteria.
From Date	The **From Date** field allows users to select the "from date" of the activity log as part of the search criteria, by either using the calendar, or manually entering the date in the following format: MM/DD/YYYY.
To Date	The **To Date** field automatically defaults to the current date in the MM/DD/YYYY format.

Administration Activity Log Screen

Field Names	Activity Log Search Results Section – Field Descriptions



Search Result - 31

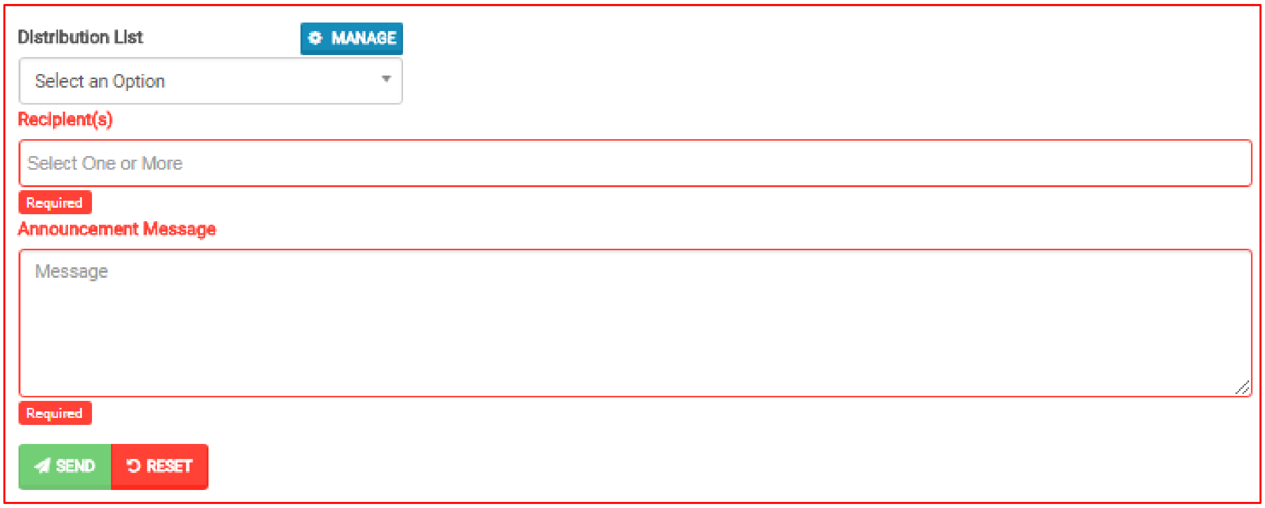
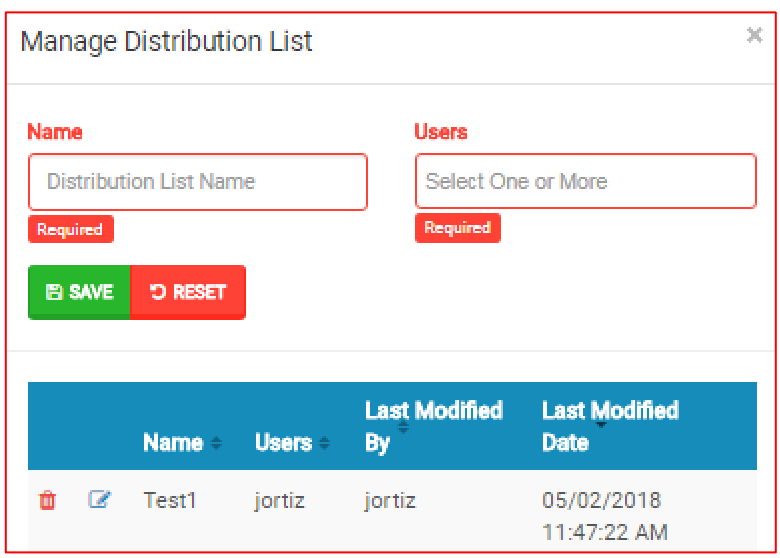
User Name	Action Type	Area Name	Message	Log Date	User Status
jortiz	Search	Maintenance ICD Code	ICD Code action search is performed by jortiz with search criteria ICD Type: ICD 10.	05/02/2018 11:33 AM	Active
jortiz	Search	Maintenance ICD Code	ICD Code action search is performed by jortiz with search criteria ICD Type: ICD 10.	05/02/2018 11:33 AM	Active
jortiz	Create	Maintenance Worklist	Worklist Test worklist1 has been create by jortiz.	05/02/2018 11:01 AM	Active
jortiz	Search	Maintenance Worklist	Worklist data has been viewed by jortiz.	05/02/2018 10:59 AM	Active

Search Results	The **Search Results** heading tells the users how many records are displayed in the results table.
Results Table	The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header.

NOTE: An activated user login stays current for 60 days. If after 60 days, there has not been a log in, the system will automatically deactivate the user.

Announcements

Announcements allows users to create announcement messages and send them to select user recipients or create and manage distribution lists.

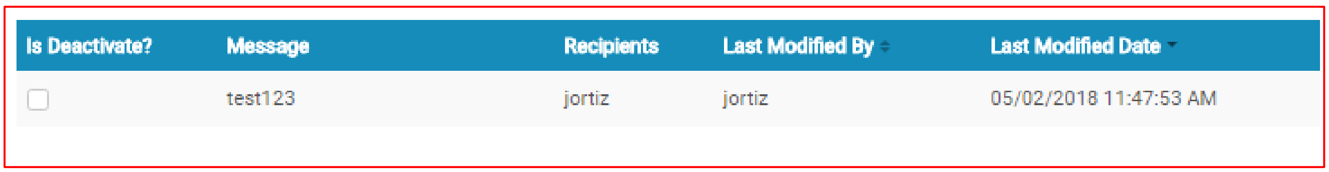
<table>
<tr><th colspan="2">Administration Announcement Screen</th></tr>
<tr><th>Field Names</th><th>Announcement Section – Field Descriptions</th></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>Distribution List</td><td>The Distribution List dropdown list allows users to select from already created lists to send the announcement message to.</td></tr>
<tr><td>Manage</td><td>Selecting the Manage button opens a Manage Distribution List popup window, which allows users to create distribution lists by entering a Name for the list and assigning corresponding Users.


Select Save to create the distribution lists with the completed required fields.
Select Reset to clear the values from the fields prior to saving.</td></tr>
</table>

Recipient(s)	The **Recipient(s)** field allows users to enter one or more recipient names to send a message. Note: Required field
Announcement Message	The **Announcement Message** field allows users to enter the details of the message being sent. Note: Required field
Send	The **Send** button allows users to send the message to the entered recipient(s).
Reset	The **Reset** button allows users to clear all data from the fields prior to saving.

Administration Announcement Screen

Field Names	Announcement Results Section – Field Descriptions



Is Deactivate?	Message	Recipients	Last Modified By	Last Modified Date
	test123	jortiz	jortiz	05/02/2018 11:47:53 AM

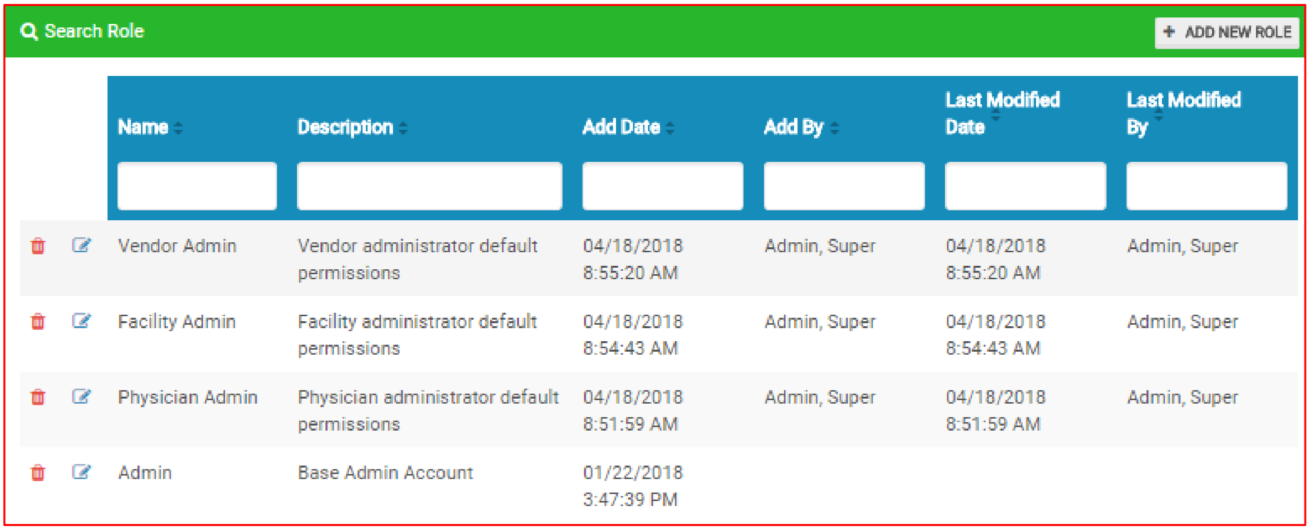
Is Deactivate?	The **Is Deactivate?** checkbox allows users to deactivate the message so that it is no longer displayed for the indicated recipients.
Results Table	The **Results Table** is a sortable display of data based on the search criteria specified and queried. To sort in ascending or descending order, click the header.

Roles

User can add a new role or choose the existing roles. Roles are tied to permissions which allows the users to navigate through the portal.

Administration Roles Screen

Field Names	Search Roles Section – Field Descriptions

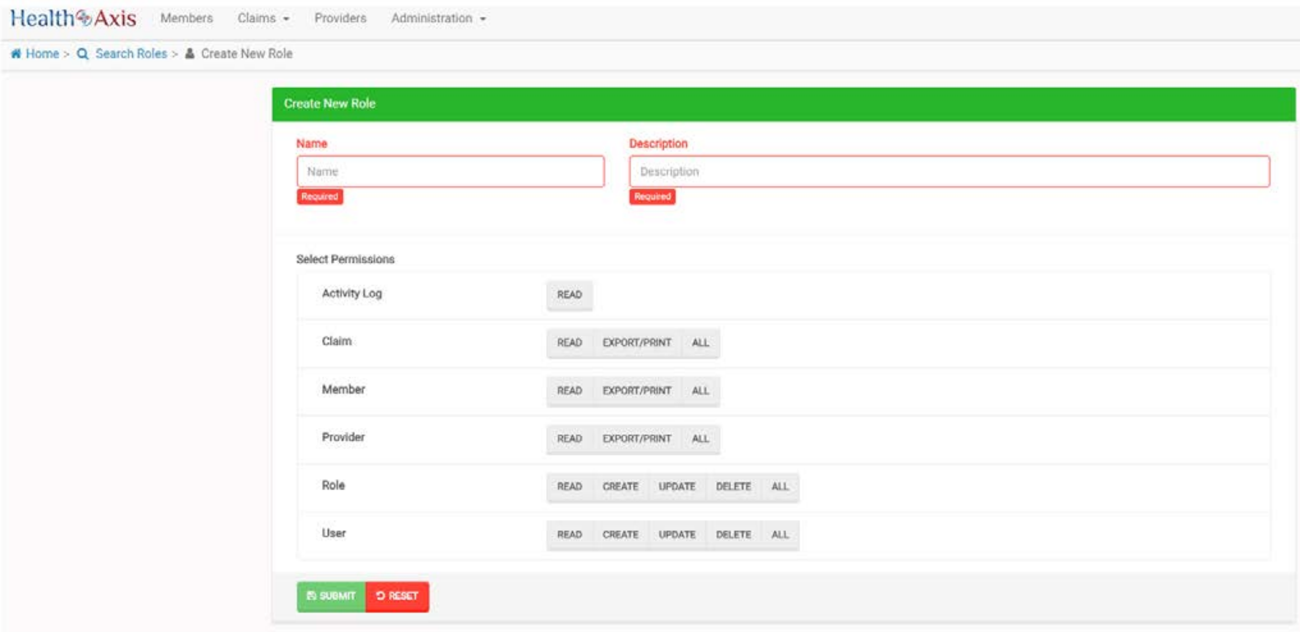


Search Role | + ADD NEW ROLE

		Name	Description	Add Date	Add By	Last Modified Date	Last Modified By
		Vendor Admin	Vendor administrator default permissions	04/18/2018 8:55:20 AM	Admin, Super	04/18/2018 8:55:20 AM	Admin, Super
		Facility Admin	Facility administrator default permissions	04/18/2018 8:54:43 AM	Admin, Super	04/18/2018 8:54:43 AM	Admin, Super
		Physician Admin	Physician administrator default permissions	04/18/2018 8:51:59 AM	Admin, Super	04/18/2018 8:51:59 AM	Admin, Super
		Admin	Base Admin Account	01/22/2018 3:47:39 PM			

Add New Role	The **Add New Role** button allows specific users to create new roles. The fields will be described in the following table.
Name	The **Name** field allows users to narrow down the search criteria by entering a name.
Description	The **Description** field allows users to narrow down the search criteria by entering a description of the role.
Add Date	The **Add Date** field allows users to narrow down the search criteria by entering a date.
Add By	The **Add By** field allows users to narrow down the search criteria by entering a date.
Last Modified Date	The **Last Modified Date** field allows users to narrow down the search criteria by entering a date.
Last Modified By	The **Last Modified By** fields allows users to narrow down the search criteria by entering a user name.
Delete Icon	The **Delete Icon** (red trash can) allows specific users to delete the selected user role.
Edit Icon	The **Edit Icon** (blue pencil) allows specific users to edit/update the selected user role.

Administration Roles Screen

Field Names	Add Roles Section – Field Descriptions
	
Name	The **Name** field allows users to enter a name for the role.
Description	The **Description** field allows users to enter a description for the role.
Select Permissions	The **Select Permission** section allows users to select the user's access within each module and section of the Provider Portal. User Roles are created with specific accesses that include: Read only, Create, Update, Delete, or ALL, among others settings per the corresponding modules.
Submit	The **Submit** button allows users to submit the changes to the role.
Reset	The **Reset** button allows users to clear all data from the fields prior to saving.

Users

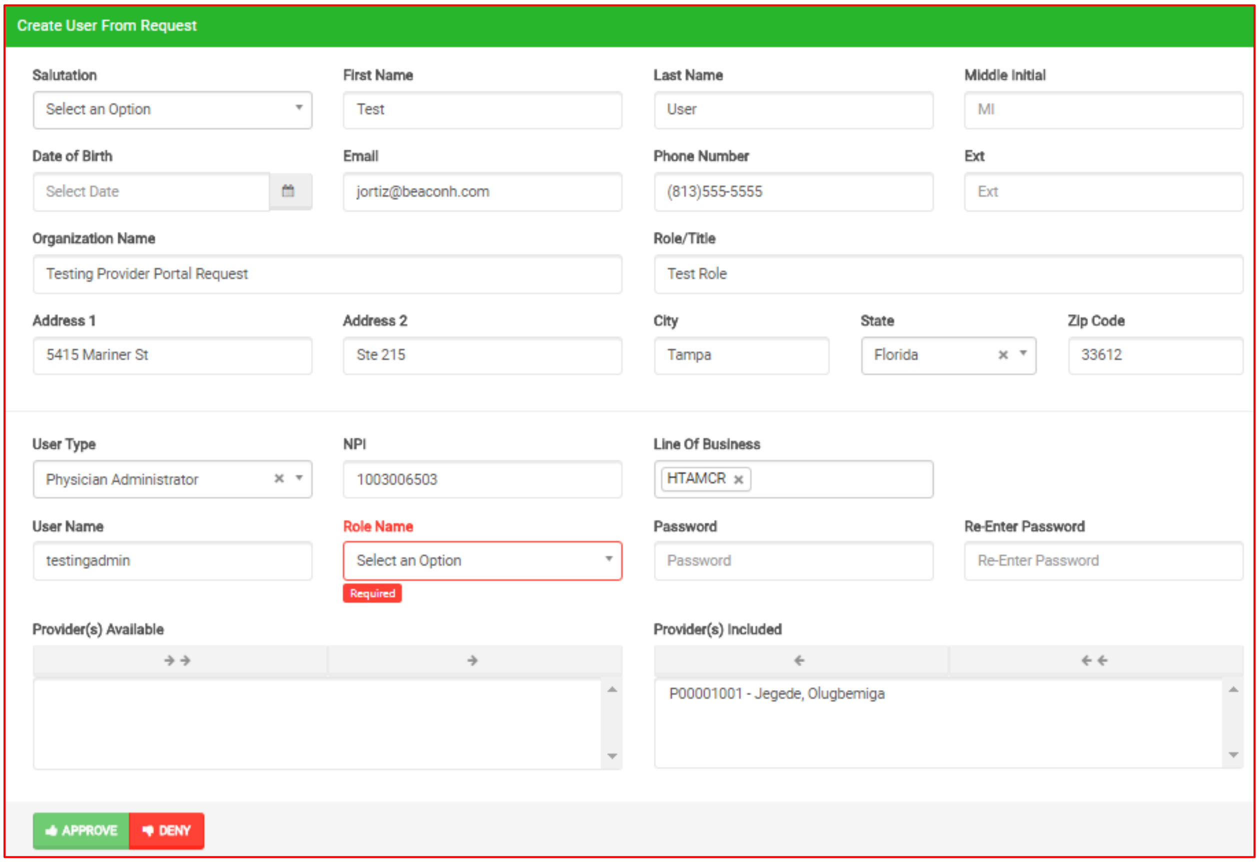
When a new user is creating an account in Provider Portal, then the user needs to request access, as described in the "How to Request Access to the Provider Portal" section.

Admin will be able to see the list of users requesting access under the 'Provider Access Request' section.

Health Axis Group

Admin can select the Edit Icon (Blue pencil) to open the request and will now be able to assign a ‘Role’ to the user from the “Role Name” dropdown list. Proceed to hit “Approve” if the request is valid or select “Deny” if invalid.

Note: The user requesting access to the provider portal will receive an email confirmation.



NOTE: An activated user login stays current for 60 days. If after 60 days, there has not been a log in, the system will automatically deactivate the user.