Maine Integrated Health Management Solution

User Guide for Provider Maintenance

Version 1.0 Final

UNISYS

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1. Introduction

In order to perform Provider Maintenance you must have already submitted an enrollment or re-enrollment application and have been *approved* as a MaineCare provider. You will also need to have registered as a trading partner. For details on how to register as a Trading Partner, please refer to the Trading Partner Registration Guide under 'Documents' on the portal.

Providers, with appropriate security, will be able to view their provider data and submit and/or update their provider file. Some simple changes, such as telephone number, can take place with minimal enrollment staff intervention. Other changes, such as adding a new service location, will be submitted online by the provider and validated by designated Provider Services staff.

The Provider Maintenance feature pulls your information entered during enrollment and allows you to edit your provider information. For detailed instructions on completing individual screens within the application refer to the appropriate Enrollment User Guide on the portal.

2. About the User Interface

2.1 Change the Text Size

Every screen of the provider maintenance application allows you to customize the size of the displayed text.

Figure 2-1: Text Size buttons in title bar

Initially, the text is shown in its smallest available size and only the Increase Text Size button appears in the title bar. If you click the Increase Text Size button, the text size increases and the Decrease Text Size button appears.

Adjust the text size to suit your needs. Your selection persists until you change it again.

2.2 Use the Navigation Features

Every screen of the maintenance application has a set of standard navigation features, including:

- **The left menu.** Shown on the left side of each page, the left menu provides a list of all the original enrollment steps, so you always know where you are in the process. Note that the menu items are clickable.
- **The standard buttons.** Located below the fields on each screen are a set of buttons that enable you to perform certain actions. The available actions depend on the purpose of the screen. However, most screens include the Next, Previous, and Save and Close buttons, which allow you to navigate to the next screen, go back to the previous screen, or save your maintenance update in its incomplete state, respectively.

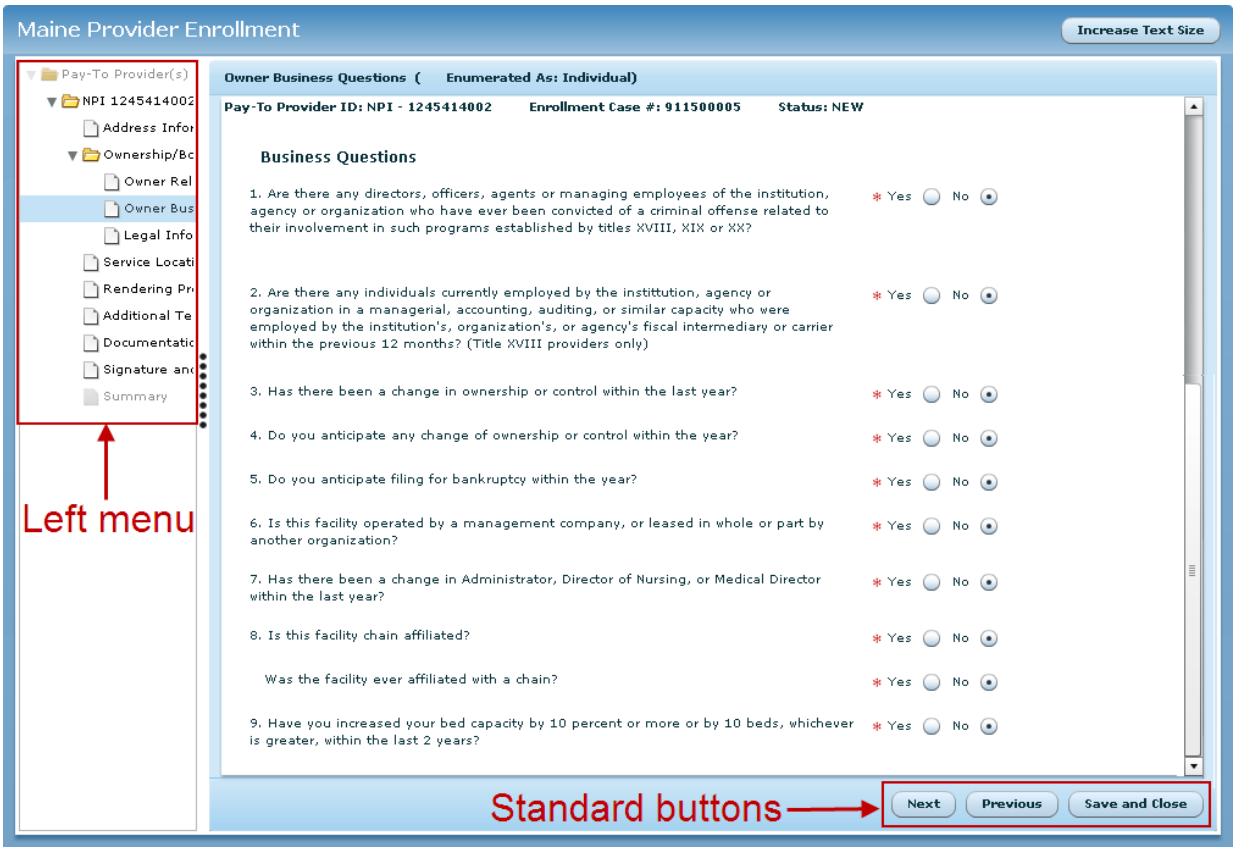

Figure 2-2: Navigation features

*Notice that there are header fields, which will appear on every maintenance screen.

Figure 2-3: Header fields

The header fields appear in the figure above:

- The top line shows the screen name, pay-to Provider name and an indicator of how the provider enumerated their NPI.
- The second line shows the Pay-To provider ID and the enrollment case number and Status.

Additional information, such as service location name or rendering provider name, can appear in the header fields, depending on the screen you are viewing. The header field content is appropriate to the context of the screen.

3. Logon

Users will be required to enter their username and password that they set up during their Trading Partner registration.

Figure 3-1: Log On

NOTE: A link to the password reset page will be provided for users who have forgotten their password, see Section 3.1 Manual Password Reset for more information.

3.1 Manual Password Reset

Users may reset their password by one of two methods:

- If the current password is known, the user will enter their current username and password. Once authenticated, the user is prompted to select another password.
- If the current password is unknown, the user must enter their user ID and answer the password reset question supplied during initial registration.

Users who are unable to successfully reset their password will be directed to the EDI Helpdesk for assistance.

3.2 Mandatory Password Reset

Users will be required to change their password every 60 days. Users will be prompted during logon to change their password if the current password is greater than 60 days old.

3.3 Logoff

Users may logoff the portal by selecting the Logoff button at any time from the navigation menu. CLOSING THE BROWSER, RATHER THAN USING THE LOGOFF BUTTON IS LIKELY TO CAUSE THE RECORD TO BECOME LOCKED AND WILL REQUIRE THAT YOU CONTACT mainecaresupport@unisys.com for TECHNICAL SUPPORT.

3.4 Automatic Logoff

Users will be automatically logged off and their session closed after 30 minutes of inactivity.

3.5 Unsuccessful Logon Attempt, Account Lockout

After five (5) unsuccessful logon attempts, the user will be locked out from the Provider Maintenance application, and must contact the EDI helpdesk at mainecaresupport@unisys.com to have the account re-activated.

4. Save and Close Feature

During Provider Maintenance, if you must close the application for any reason, click the "Save and Close" button on the lower right side of the screen. This feature will save the information entered for a period of 30 days. To resume your Provider Maintenance, you will need to access it via the 'Resume Enrollment' link from the left menu – Provider Enrollment – on the home page. If you use the Provider Maintenance link again, you will receive the following error message: "The provider already has maintenance in progress. You must click 'Resume Enrollment' to access this application".

To resume Provider Maintenance, you will need the following information:

- The email address as specified in the original enrollment
- Tax ID number
- Pay-To Provider NPI
- New enrollment case number (will be assigned during any Provider Maintenance - Full and Provider Demographic functions and sent in an email to the Contact Email Address. It is recommended that you make a note of it when it appears on the screen).

5. Provider Maintenance

Once you are logged into your account, you will see options on the left side of the Secure page. Be sure you are on the Secure Page by clicking the 'Secure' tab at top of screen.

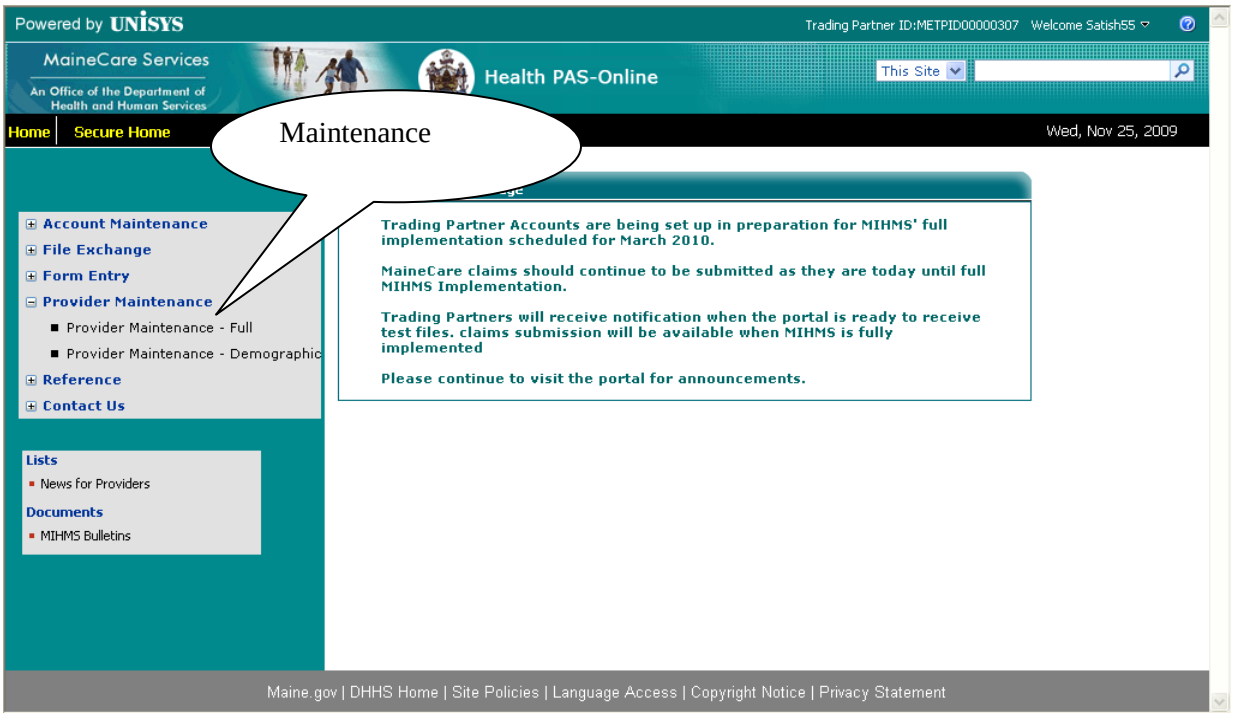

Figure 5-1: Provider Menu Options

You may choose from 'Provider Maintenance – Demographic', reference Section 5.1 or 'Provider Maintenance – Full', reference Section 5.2.

The following fields will be locked and cannot be edited:

- Provider or Business Name
- Authorized Registrant First Name
- Authorized Registrant Last Name
- Provider ID
- Tax ID

The data is displayed but 'grayed-out'. If the information in a locked field changes, you will be required to contact Provider Services.

5.1 Provider Maintenance – Demographic

Provider demographic data can be self-maintained through the Provider Portal. These are the items that may be updated in Provider Maintenance – Demographic:

- Contact name
- Telephone number
- Email address
- Service location address
- Office hours
- Patient restrictions
- Languages spoken
- Rendering provider address
- Rendering provider phone number
- Rendering provider email address
- Whether a service location or rendering provider is accepting new patients or not.

5.1.1 Step 1 – Select Provider Maintenance – Demographic

1. From the Secure page of the portal, click on the link for 'Provider Maintenance – Demographic'

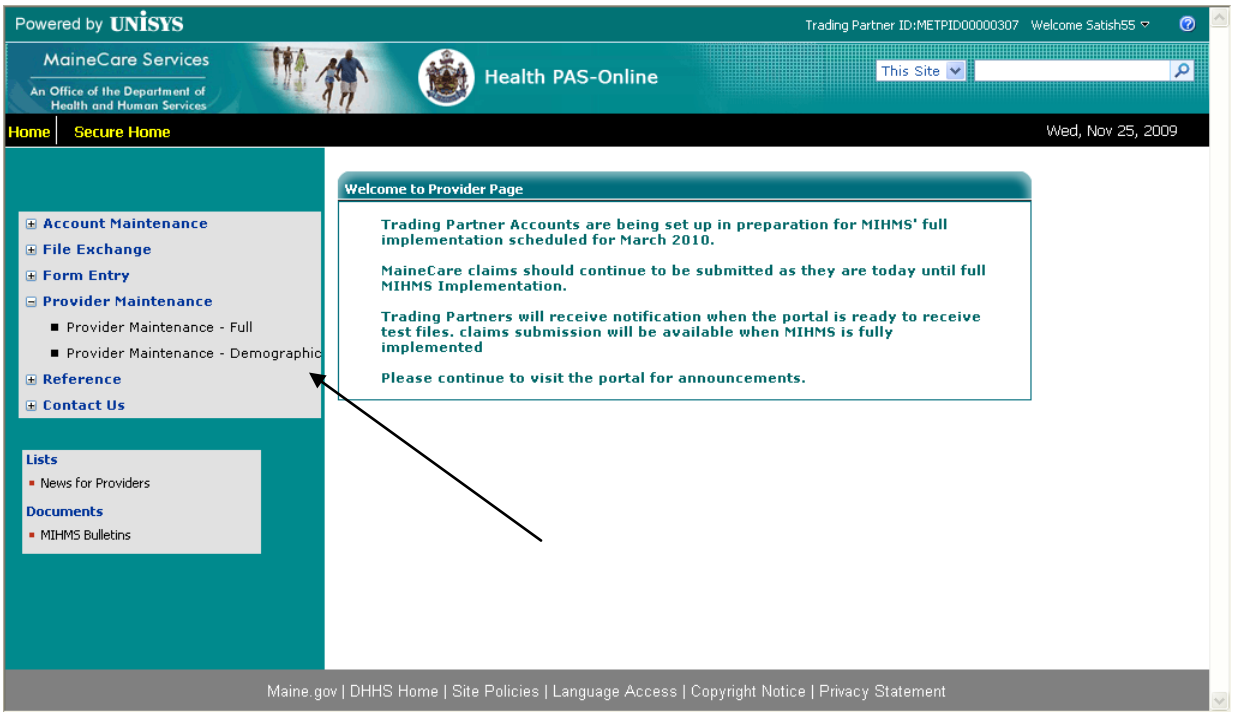

Figure 5-2: Provider Maintenance - Demographic

2. Complete the fields necessary to identify your enrollment application. Validation fields are:
   - Contact email address (as provided in your original enrollment application)
   - Pay-To-Provider NPI
   - Tax Identification Type (select either SSN or FEIN used in original enrollment)
   - SSN or FEIN entered in your original enrollment

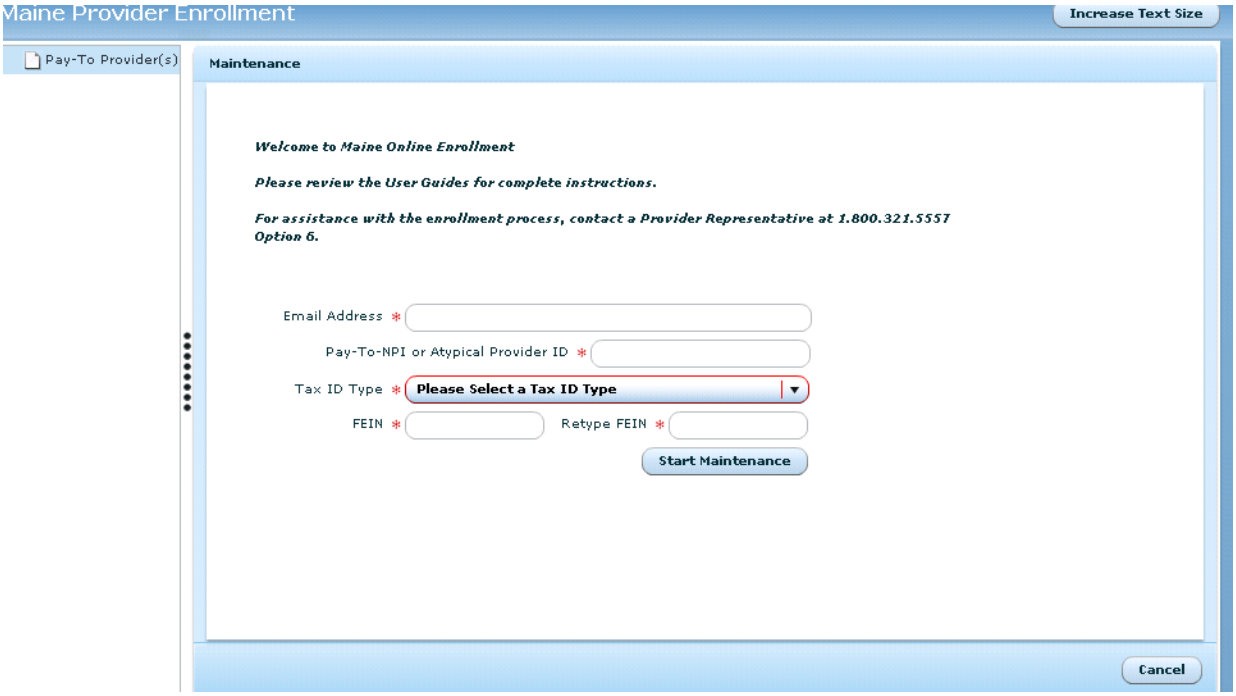

Figure 5-3: Validation Fields

5.1.2 Step 2 – Select Required Enrollment Section

The Business Information screen is displayed enabling demographic fields on this screen to be modified. Click Next to move to the next screen or you may select the screen requiring updates from the left navigation pane (see Navigation, section 2.2)

Guidance on field content may be found in the relevant Enrollment Guide posted to the portal at https://mainecare.maine.gov.

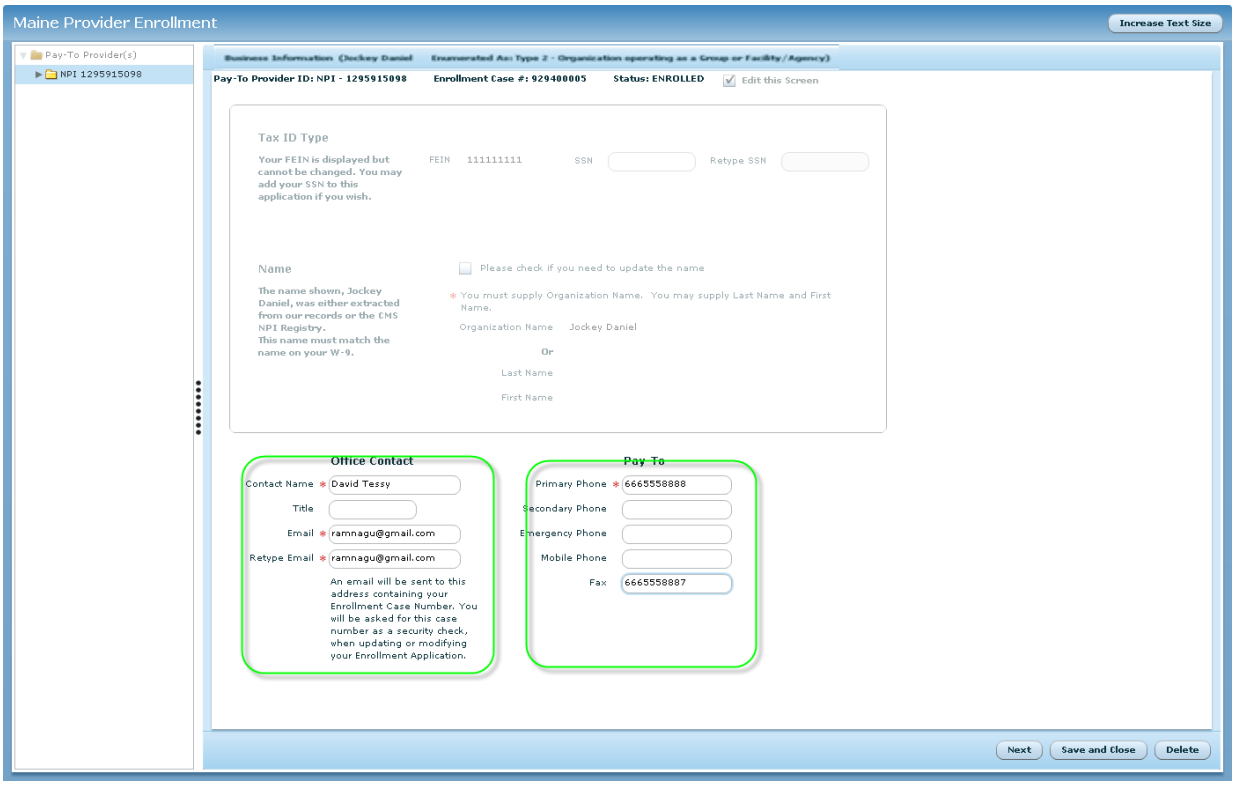

Figure 5-4: Business Information Screen

5.1.3 Step 3- Navigate through Screens to Update Demographic Data

Note: Fields cannot be modified under Provider Maintenance – Demographic if grayed out.

You may navigate through the screens by using the navigation buttons on lower right, or you may select the screen requiring updates from the left navigation pane (see Navigation, section 2.2). Make any changes as necessary.

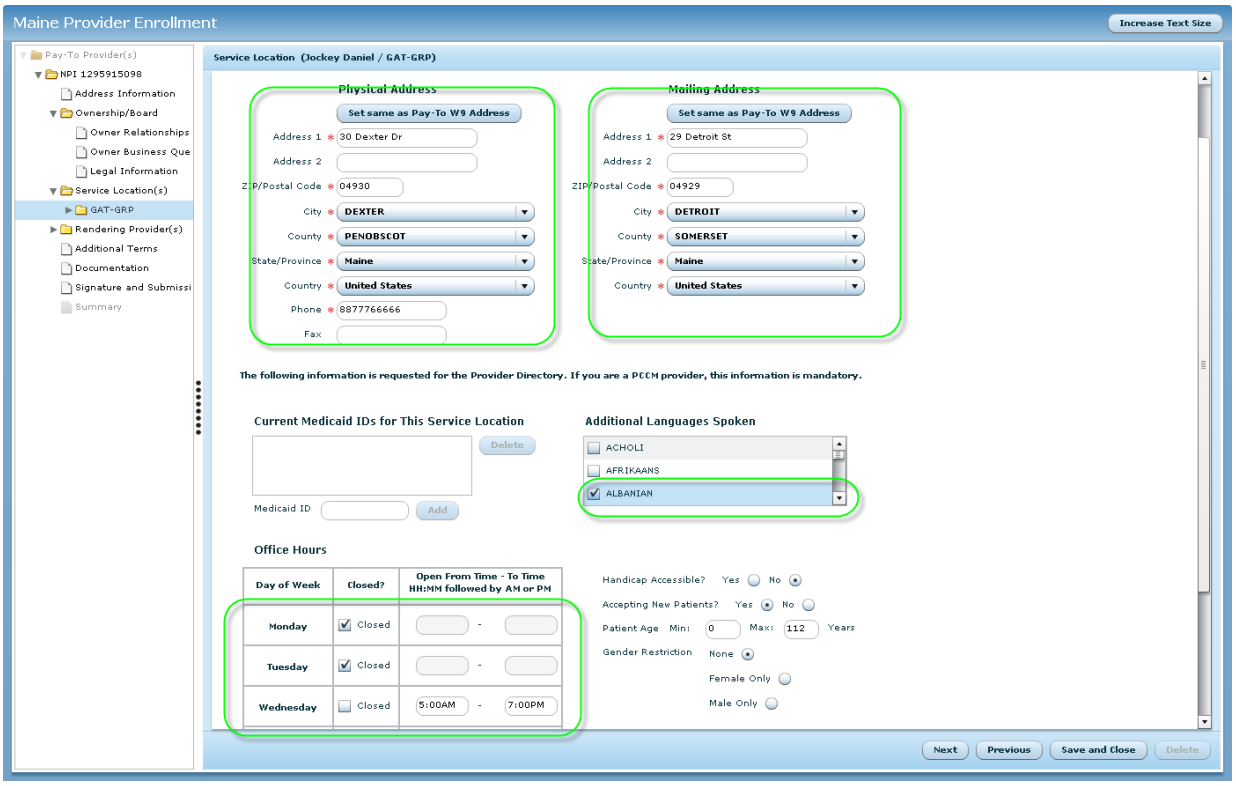

Figure 5-5: Sample Service Location update screen

Rendering provider demographic information can be updated through the main Rendering Provider screen. Although the first and last name of the rendering provider can be changed, the rendering provider NPI cannot be changed.

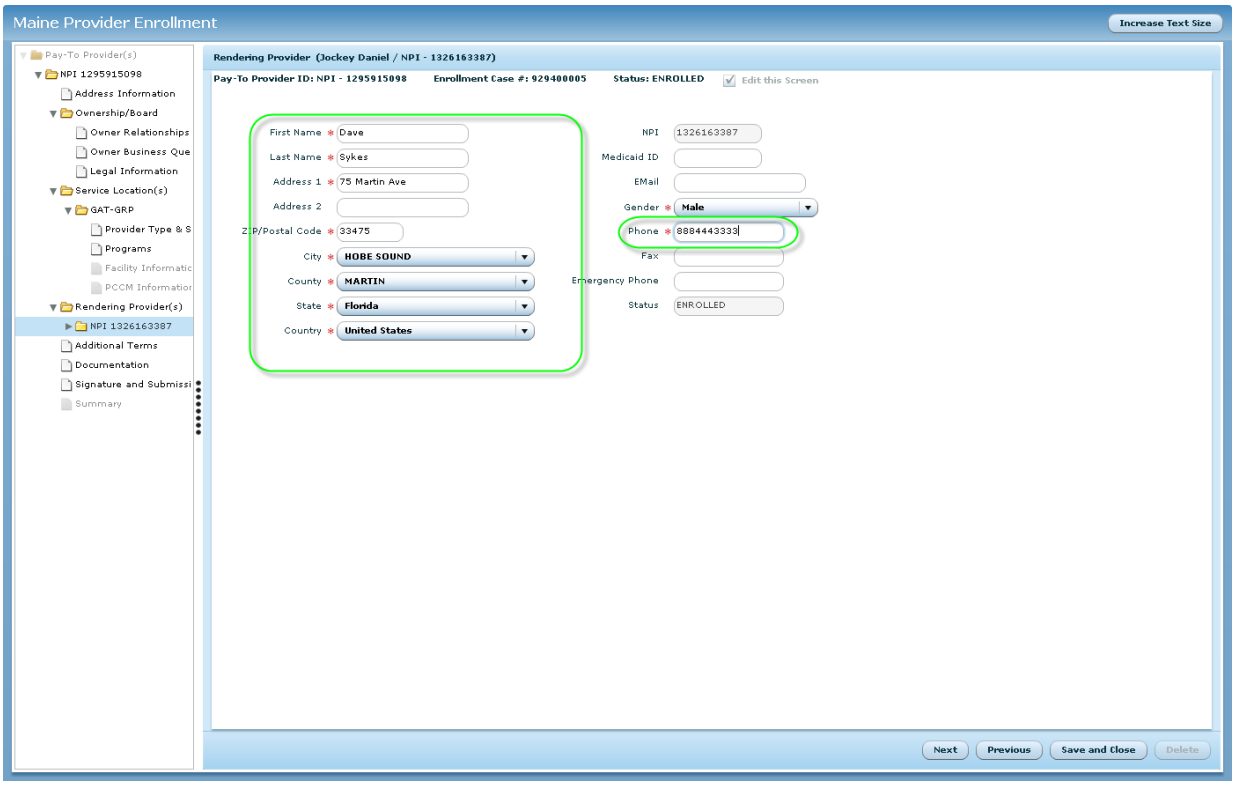

Figure 5-6: Sample Rendering Provider Demographic Update

5.1.4 Step 4 - Signature and Submission

The Signature and Submission screens must be completed. The enrollment modification must be electronically signed again by entering Provider Name, Signatory Name, Signatory SSN (or FEIN) and current date (must be today's date). The Documentation screen is displayed for information purposes only (see Figure Figure 5-8: Required Documentation (displayed for info only).

Once the maintenance application is submitted, demographic data is immediately updated in Health PAS Administrator and, if applicable, the updated data is displayed in the Provider Directory.

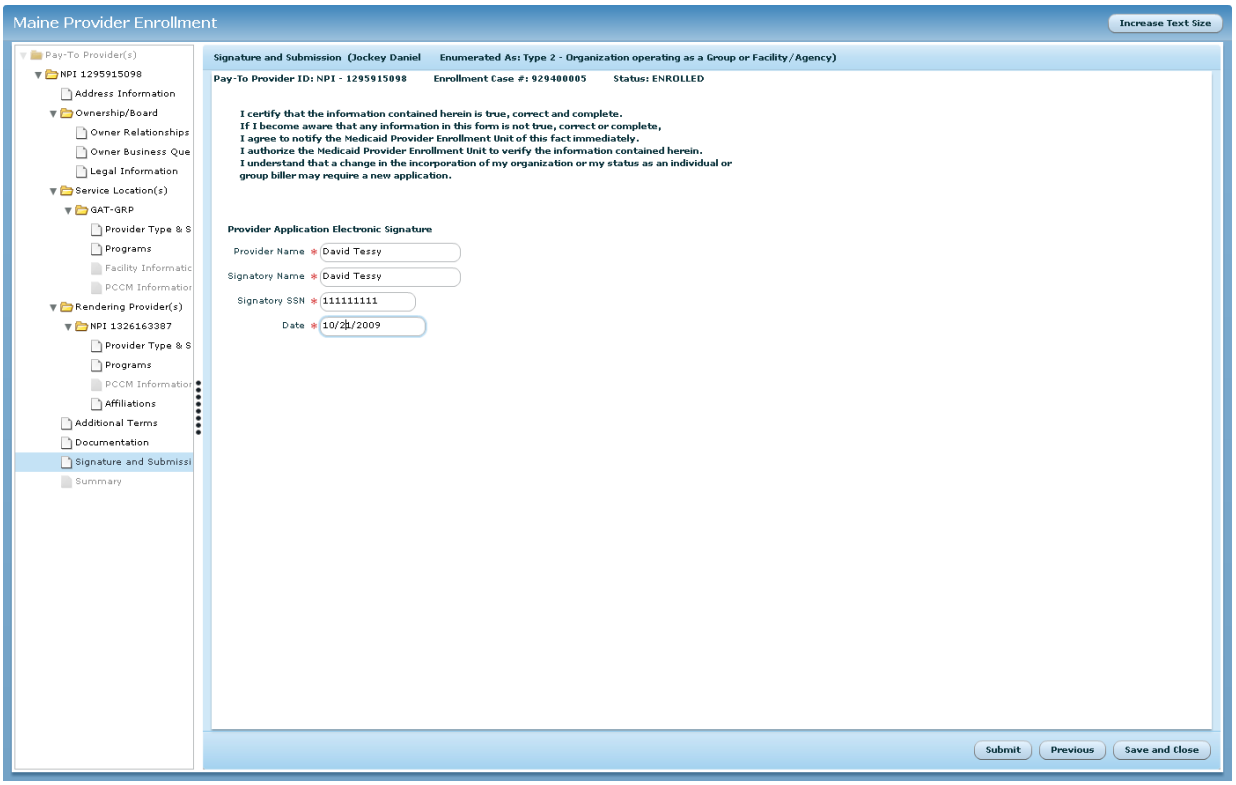

Figure 5-7: Electronic Signature Page

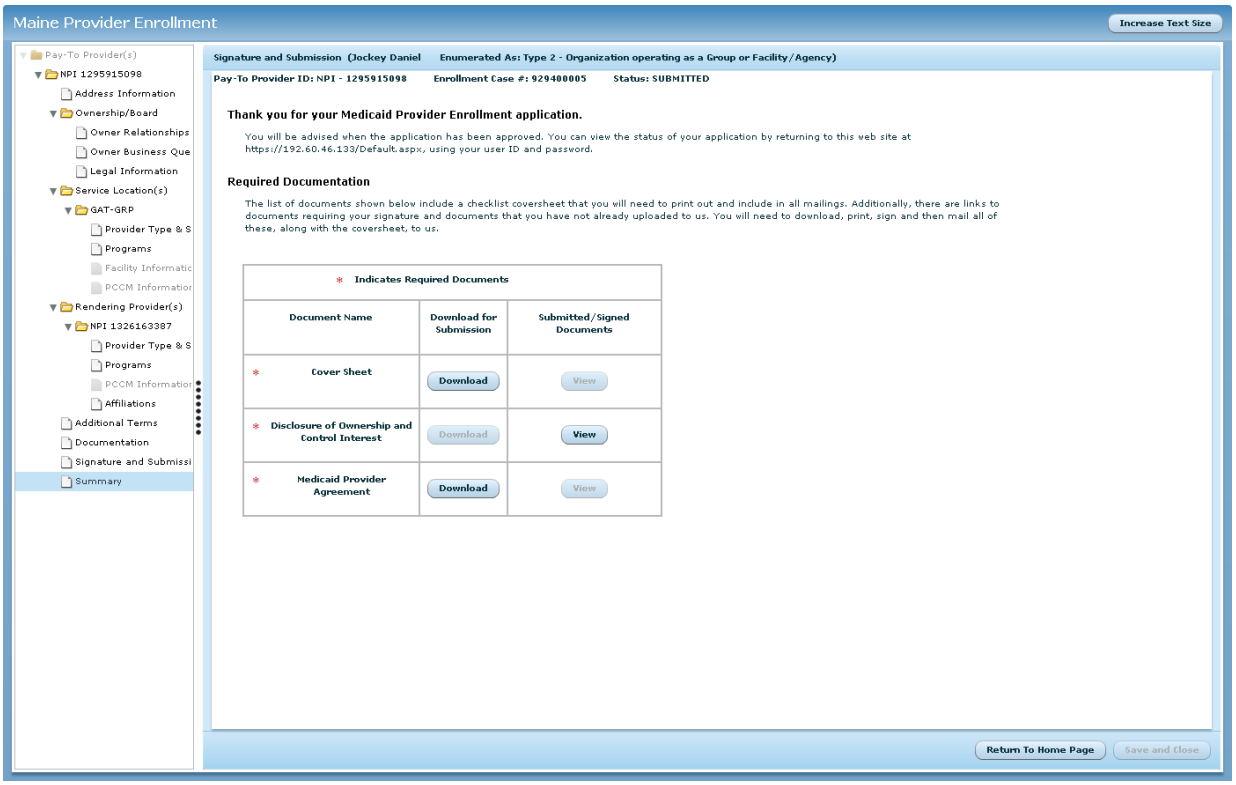

Figure 5-8: Required Documentation (displayed for info only)

5.2 Provider Maintenance – Full

Providers, with appropriate security, will be able to view their provider data and submit changes. All changes in Provider Maintenance – Full, such as adding a new service location or rendering provider, will be submitted online by the provider and validated by DHHS staff.

Provider Maintenance - Full must be used for changes like:

- Add or remove an Owner or Board Member or change response about Owner/Board Member
- Add or remove a Service Location or Rendering Provider
- Add or delete a Service Location or Rendering Provider specialty
- Update license or certification information

A Provider Maintenance – Full application cannot be started while a previous submission is waiting to be approved or denied.

5.2.1 Step 1 – Business Information Screens

From the Provider page of the portal, click 'Provider Maintenance – Full' link (see Figure 5-9: Provider Maintenance - Full option.)

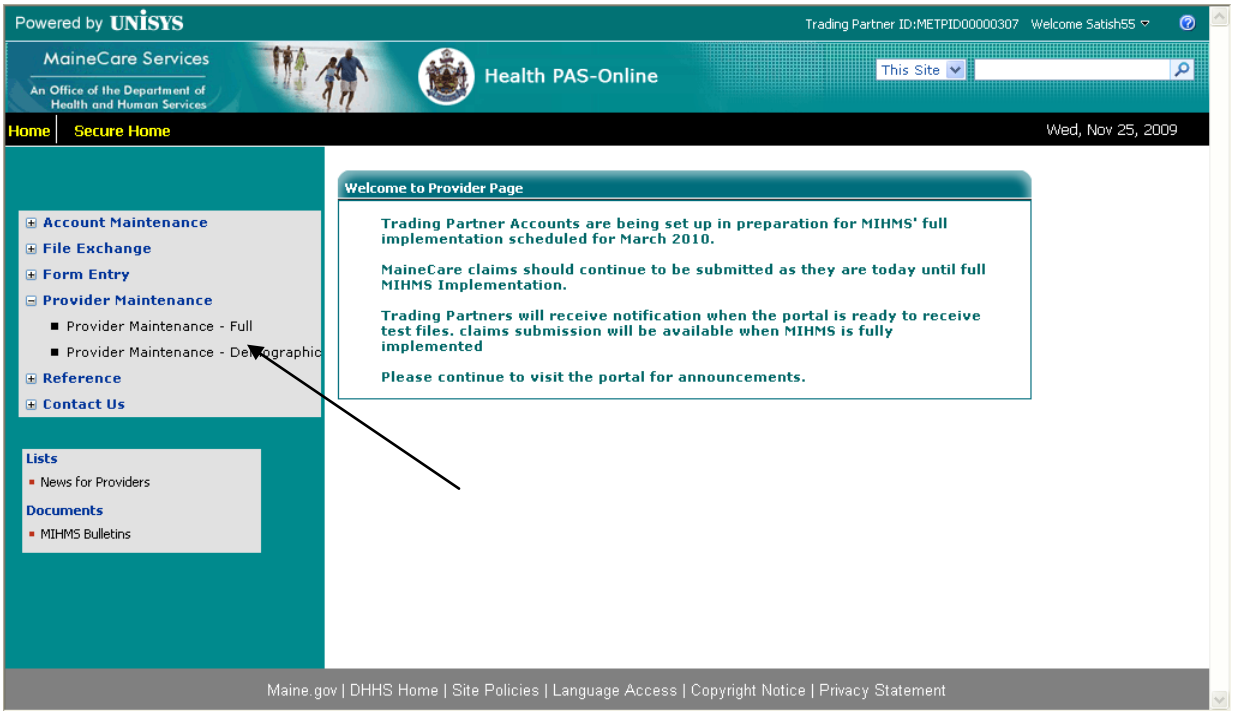

Figure 5-9: Provider Maintenance - Full option

Complete the fields necessary to identify your enrollment application. Validation fields are:

- Contact email address (as provided in your original enrollment application)
- Pay-To-Provider NPI
- Tax ID Type (either SSN or FEIN)
- SSN or FEIN

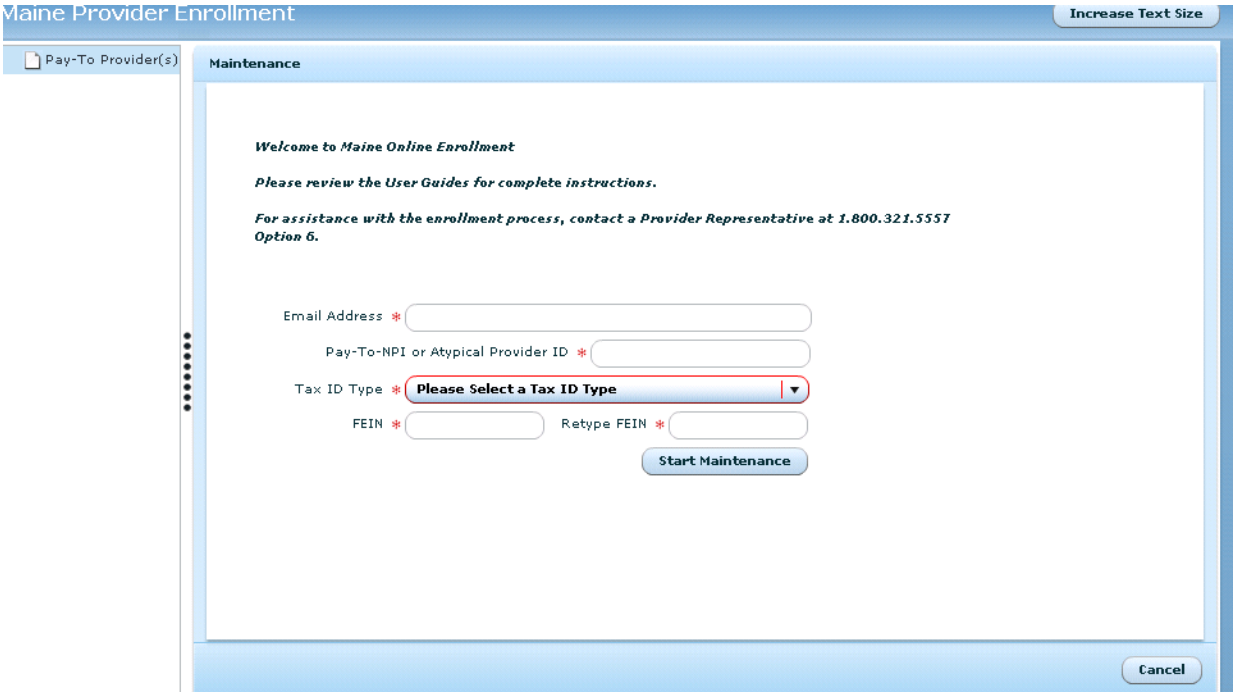

Figure 5-10: Validation Fields.

The Provider Maintenance – Full application produces a full set of provider enrollment screens with all fields pre-populated with your current provider enrollment data.

During Provider Maintenance – Full, demographic data is grayed-out and -non modifiable. These fields are updated under the Provider Maintenance – Demographic functionality (see section 5.1: Provider Maintenance – Demographic).

A new case number is assigned to each new instance of Provider Maintenance – Full. The Enrollment Case # field shows the application's case number. You may need this number later to perform such actions as continuing or modifying your maintenance application. (See Fig Figure 5-11: Edit the Screen check box). An email containing your new Provider Maintenance Case #, will be sent to the Contact Email Address.

To change data on the screen, the you must check the box 'Edit this Screen' (see Fig Figure 5-11: Edit the Screen check box)

Screens displayed during Provider Maintenance are the same screens completed during Provider Enrollment/Re-enrollment. If you have questions about the data to be entered in these screens, refer to the Provider Enrollment Guide for detailed instructions.

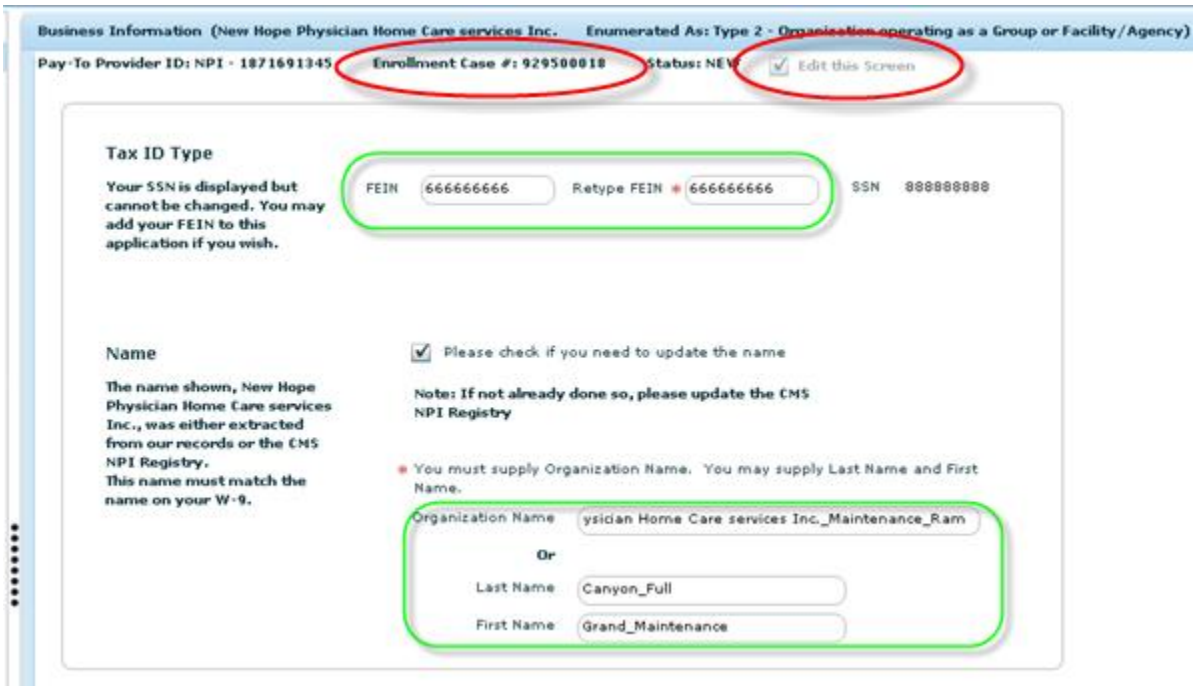

Figure 5-11: Edit the Screen check box, Enrollment Case Number

Data elements on the Pay-to/W-9 screen are displayed below. You must ensure that all data values you furnish here **exactly match** information you have furnished to IRS.

Using the left navigation pane, you can jump to specific enrollment pages.

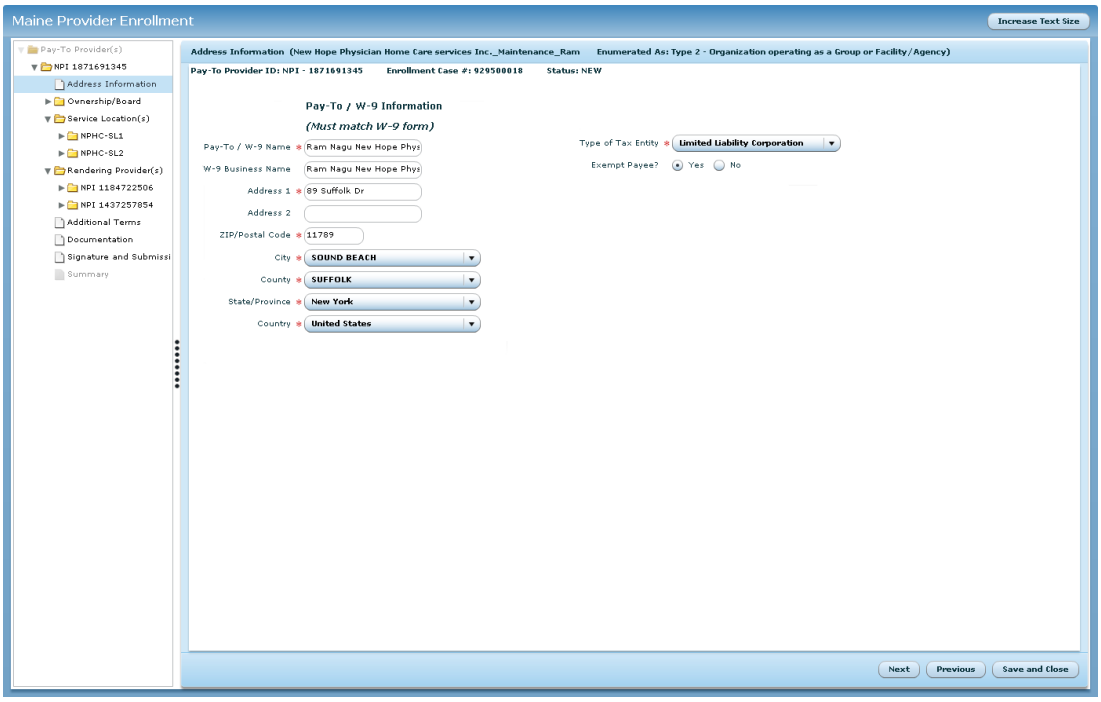

Figure 5-12: W-9 Info Screen (non-modifiable)

5.2.2 Step 2 – Ownership Screens:

You can edit an existing Owner/Board Member by clicking on existing record in the Owner/Board Member list. Data for that Owner/Board Member will populate the data fields which can be modified and saved. New owners or board members can be added and existing owners/board members can be deleted.

Note: Once a new owner/board member record is started, all related fields must be completed before moving to other screens. For detailed screen information, see the appropriate Provider Enrollment User Guide.on the portal.

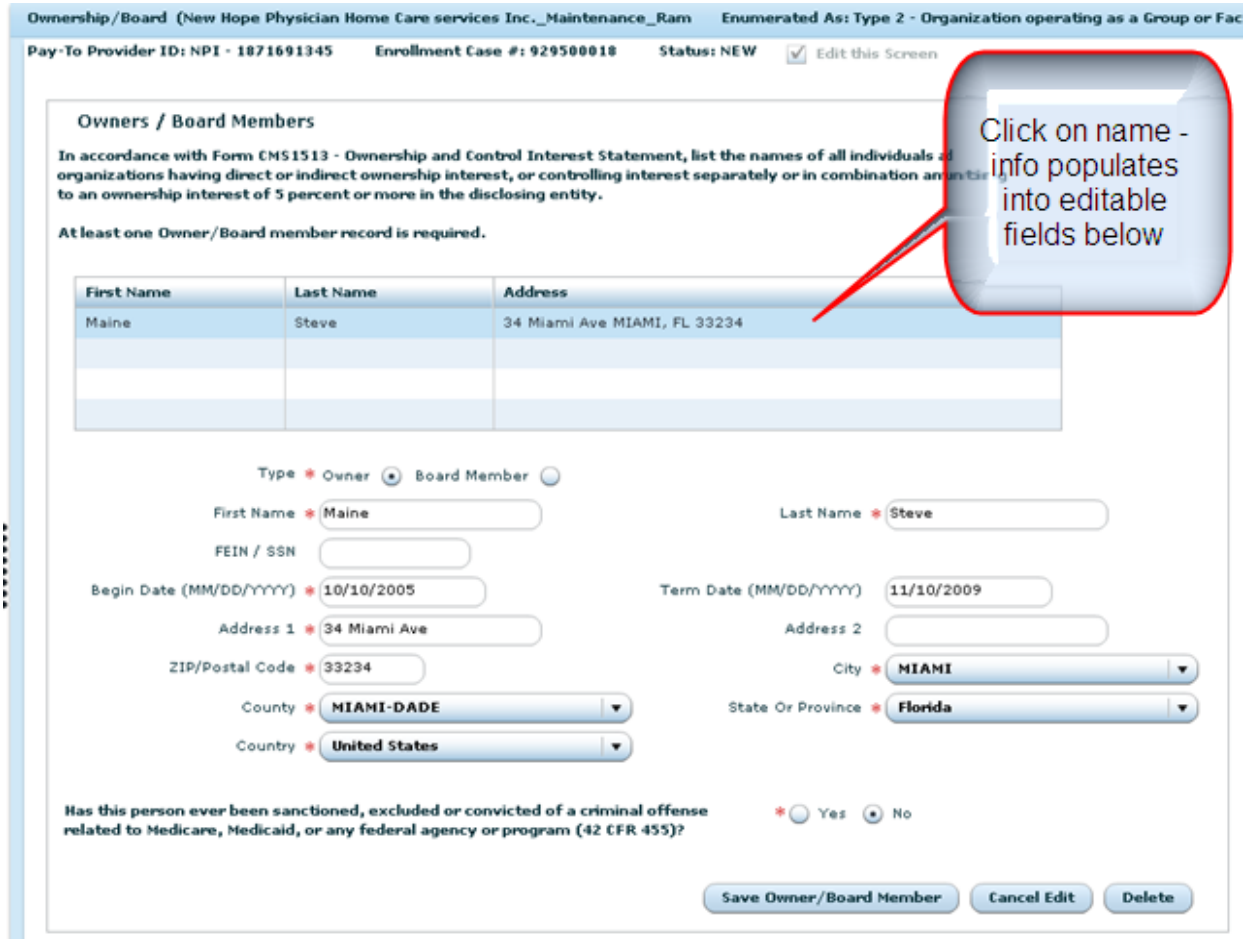

Figure 5-13: Ownership Info

5.2.3 Step 3 – Service Location Screens:

New Service Locations can be added from the Service Location summary screen. A three-digit Service Location number will automatically be added. Existing Service Locations can be terminated from the same Service Location summary screen.

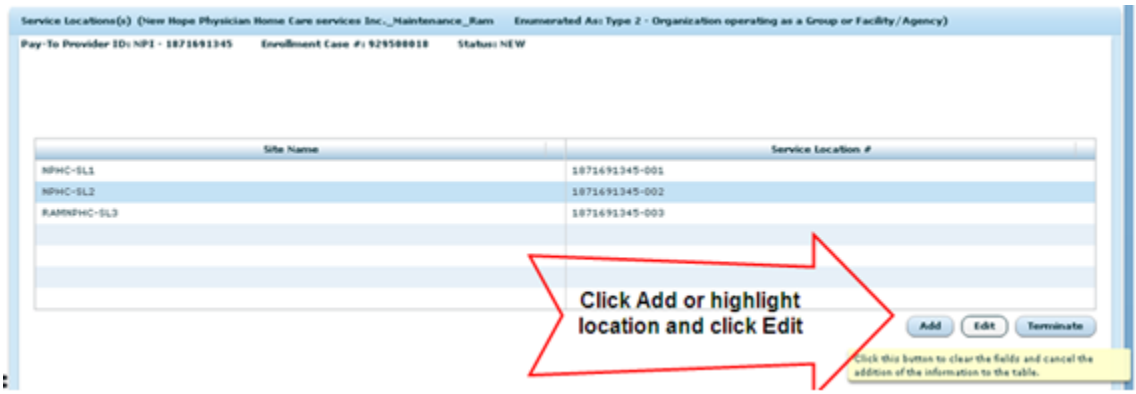

Figure 5-14: Service Location Summary screen

Data related to existing Service Locations can be modified by opening the appropriate Service Location folder (from the left navigation pane) and modifying the required field on the Service Location main screen, Service Location provider type and specialty screen or Service Location program screens.

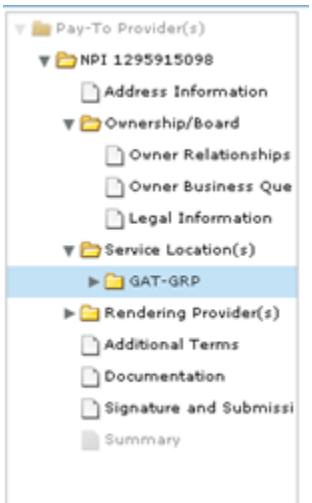

Figure 5-15: Service location folder (sample) on navigation pane

The Speciality cannot be modified for an existing enrollment but an existing Speciality can be terminated and one or more Specialties can be added to the existing Service Location record. Depending on the additional Specialties added, additional questions, licensing and certification information may display. Each Speciality is associated with start and end dates.

While this should be rare, a Provider Type may be terminated after associated Specialities are individually terminated using end dates.

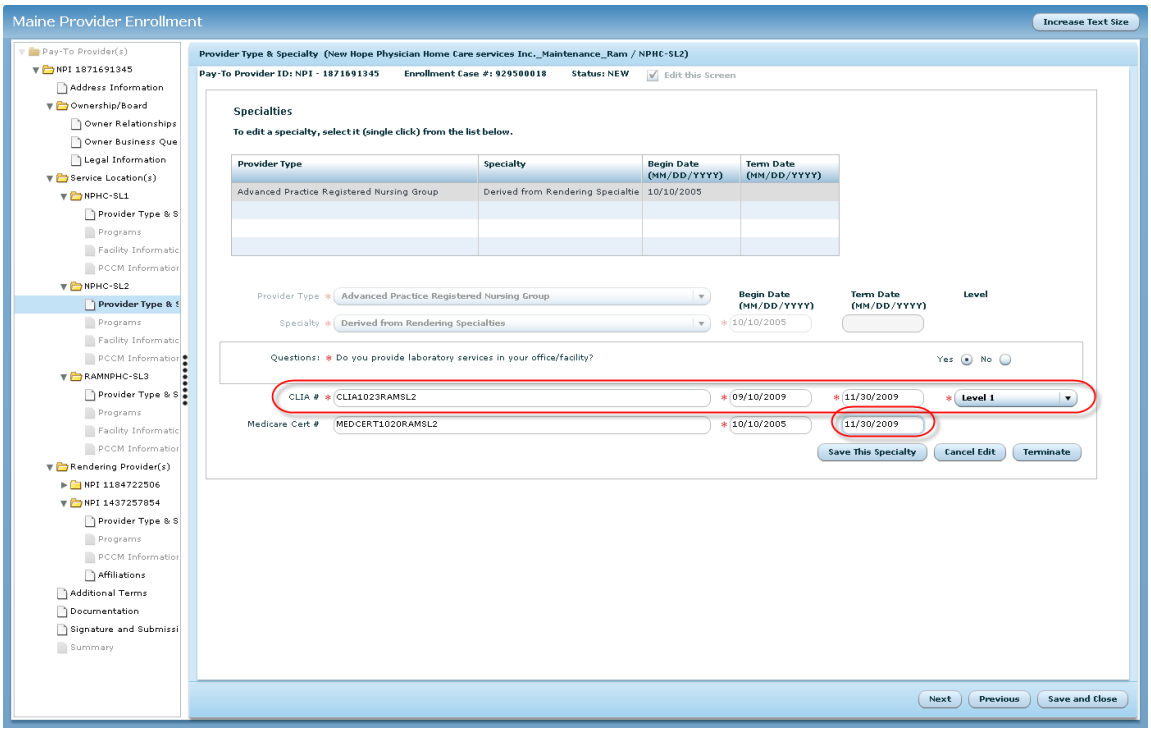

Figure 5-16: Provider Type and Specialty screen

Service Locations can be terminated from the Service Location summary screen.

To terminate a Service location:

1. Highlight the required Service Location record and click the Terminate button.

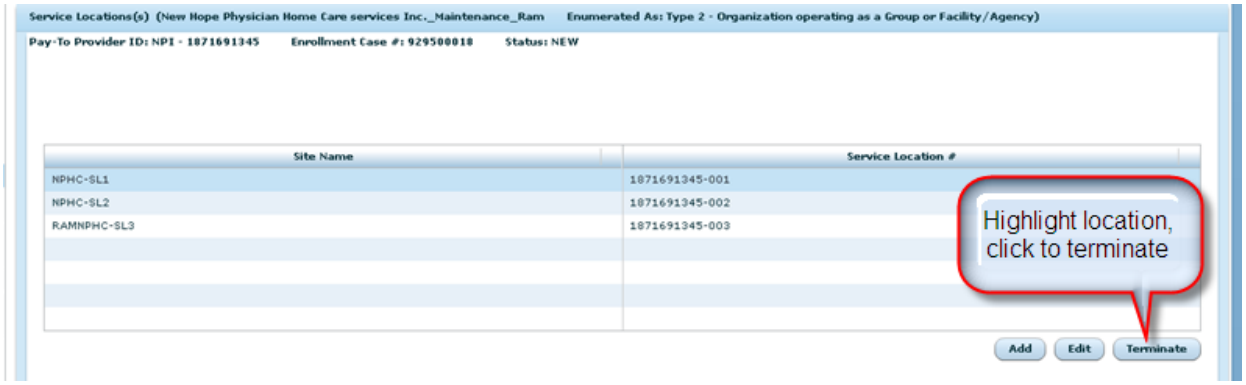

Figure 5-17: Terminate Service Location

2. Terminating an existing Service Location displays a confirmation screen for you to accept prior to record termination.

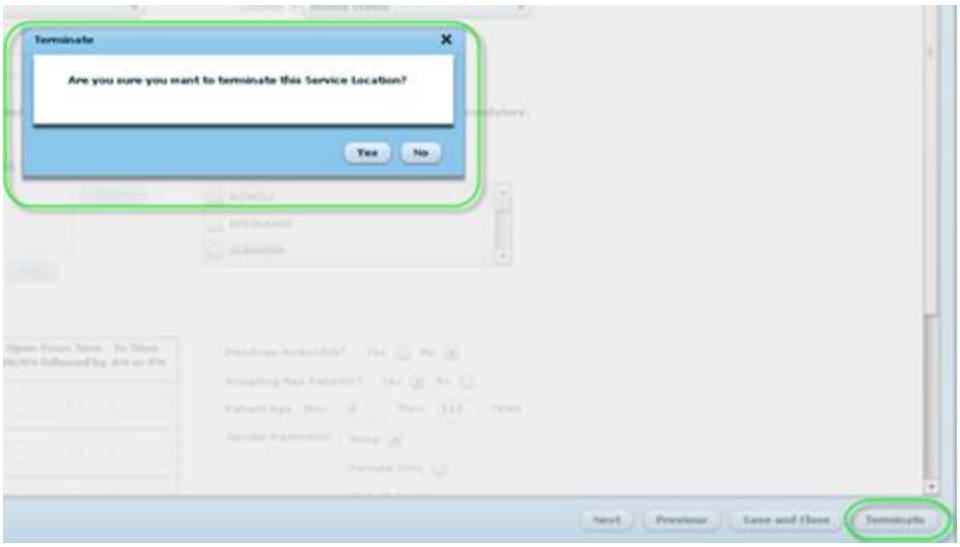

Figure 5-18: Termination confirmation

3. Once a service location termination has been confirmed, the termination date is required.

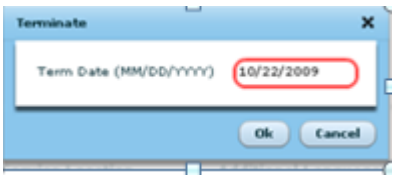

Figure 5-19: Service Location Term date

5.2.4 Step 4 – Rendering Provider Screens:

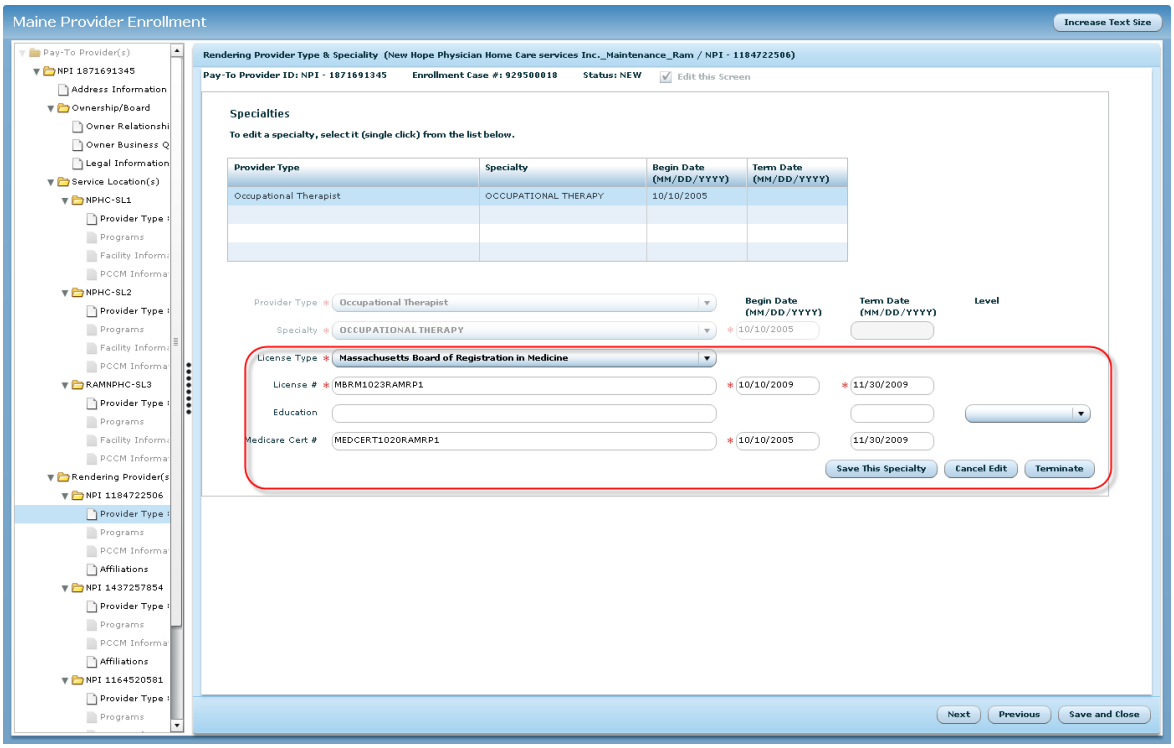

Figure 5-20: Rendering Provider Screen

If your practice terminates the services of a Rendering Provider, the Rendering Provider is not terminated with MaineCare, but their affiliation to your practice is terminated. Terminating a Rendering Provider's Affiliation to a Pay-To-Provider is done by entering a Term Date on the Provider Type/Specialty screen.

Note: To update a Speciality for a Rendering Provider, you must terminate and end-date the original Specialty and open up the new Specialty.

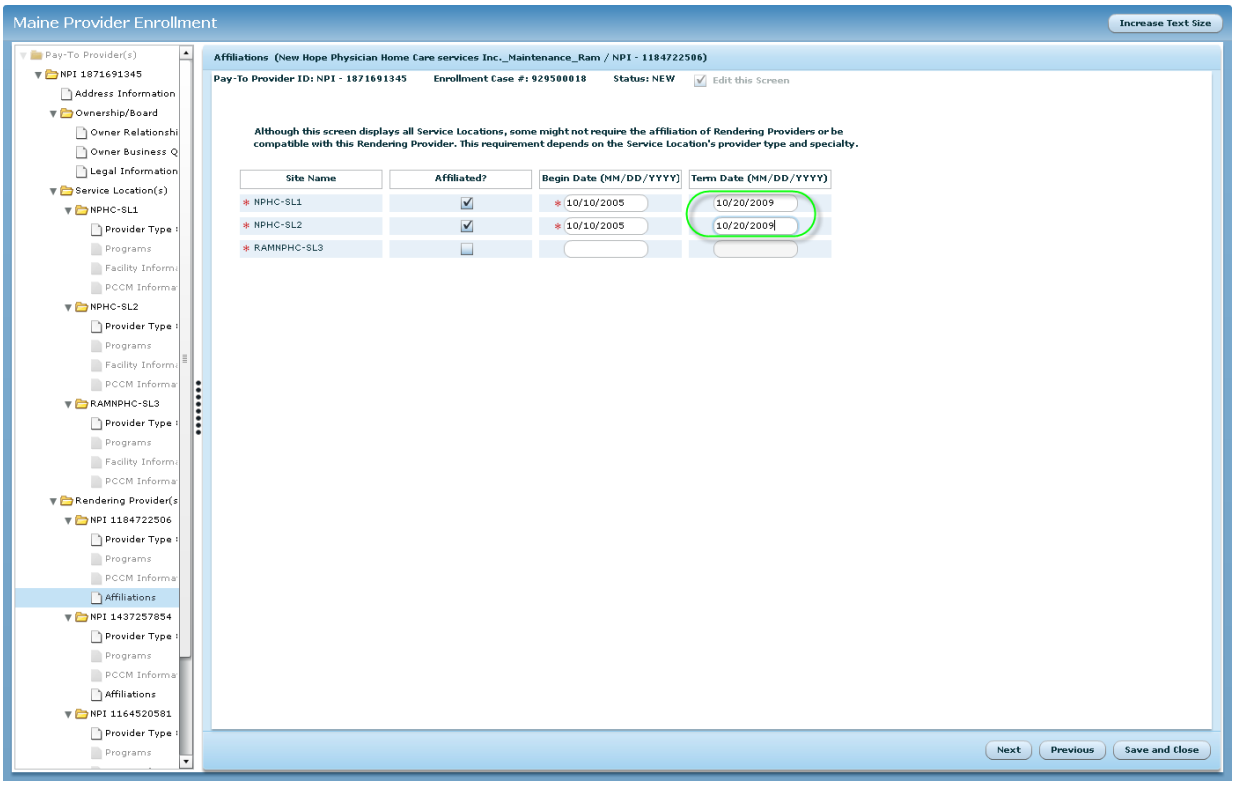

Figure 5-21: Provider Affiliations

Depending on the changes made during the Provider Maintenance session, you may be required to attest to additional MaineCare agreement clauses. These will be displayed in the Attestation Screen

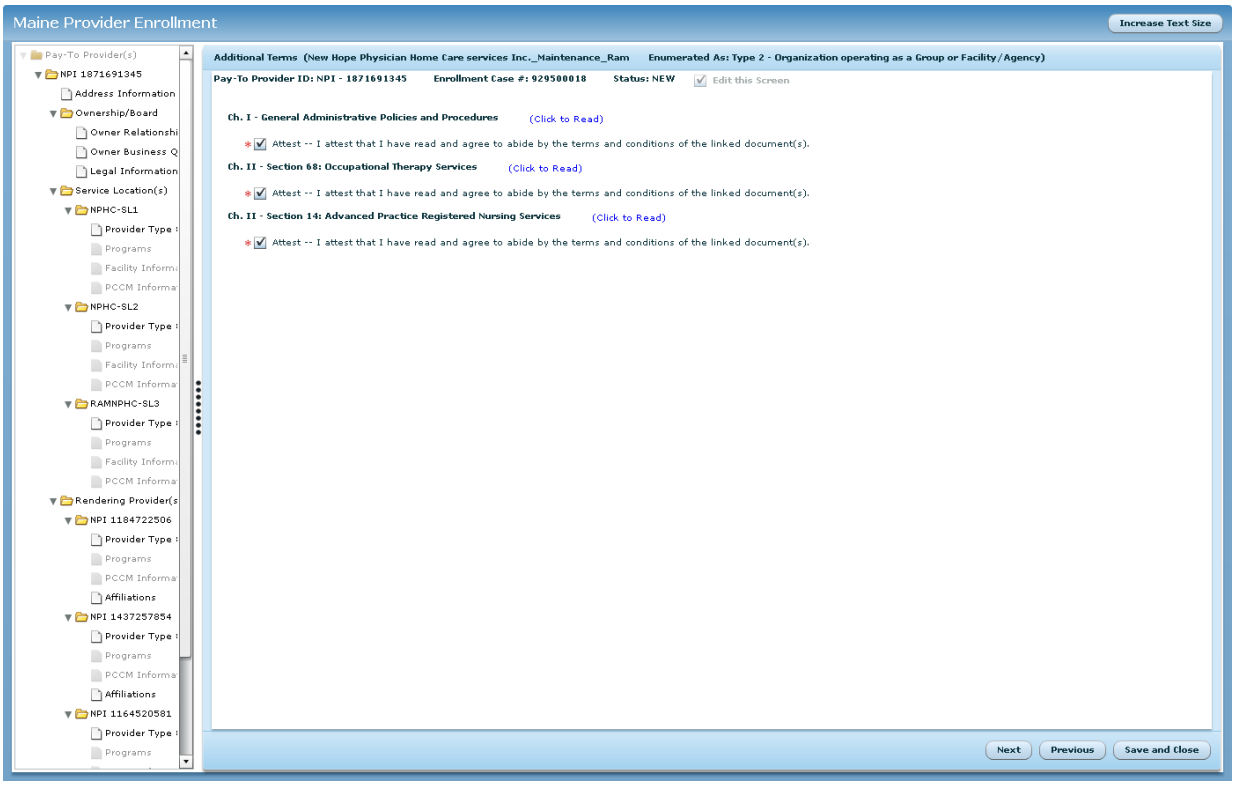

Figure 5-22: Attestations

5.2.5 Step 5 - Signature and Submission screens

The Signature and Submission screens must be completed. The enrollment modification must be electronically signed by entering Provider Name, Signatory Name, Signatory SSN (or FEIN) and current date (must be today's date).

The Documentation screen is displayed for information purposes only (see Figure Figure 5-23: Required Documentation (displayed for info only)).

At this time, the MIHMS Re-enrollment Portal asks providers to confirm their electronic signature using their Social Security Number (SSN) as a unique identifier. As of today, providers who have re-enrolled using a Federal Employer Identification Number (FEIN) have the option of using that FEIN instead of the SSN, even though the field label on the web page itself still reads "Signature SSN." This will soon be changed to say "Signature SSN or FEIN."

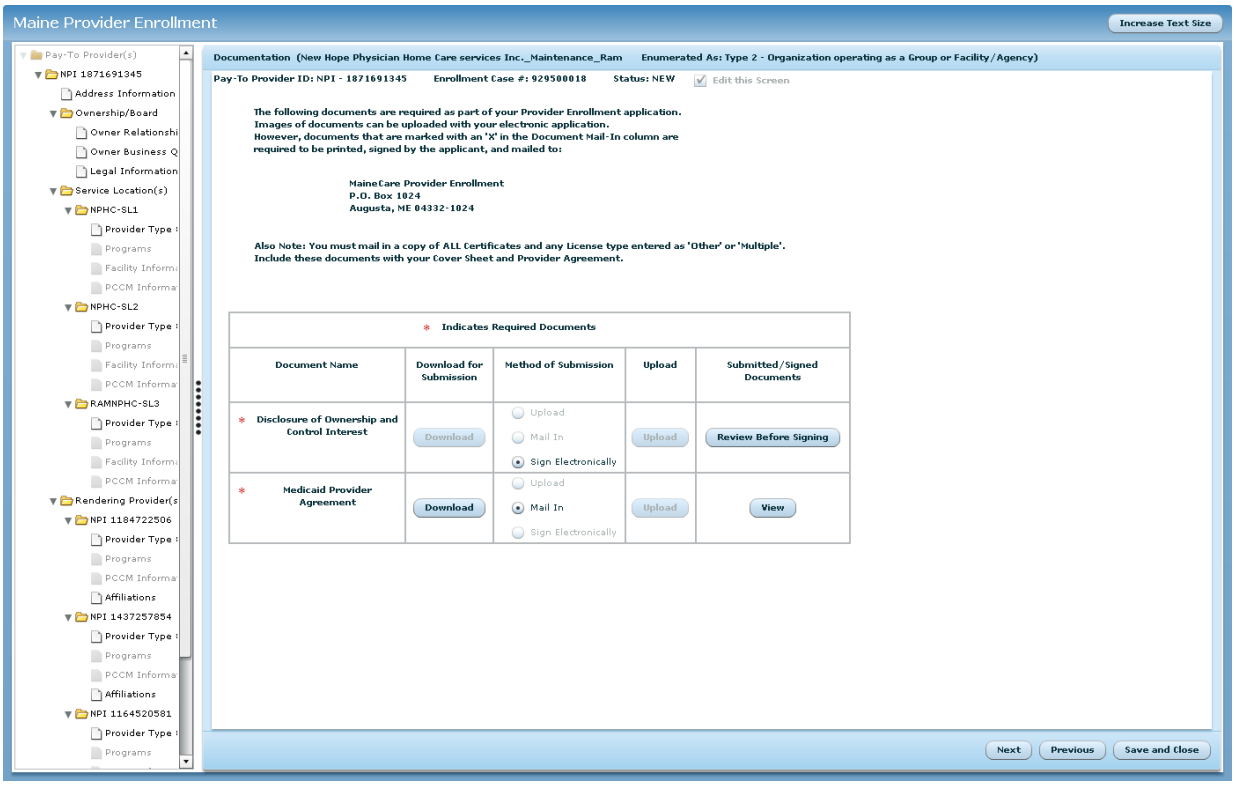

Figure 5-23: Required Documentation (displayed for info only)