# NYS PSM
# Provider Enrollment and Management User Manual for Providers

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# Preface

## Purpose and Scope

The New York State Provider Services Module (NYS PSM) is an online system that helps manage provider enrollment and credentials. It includes a secure, easy-to-use portal where providers can enroll, update their information, ask questions, and get support. The system also allows administrators to handle enrollment, disenrollment, and provider records.

This user manual describes the NYS PSM functionality specific to the Provider Enrollment and Management area.

This document does not provide technical interface specifications including systems, technical integration mechanisms, or other technical considerations.

## Document Conventions

This document uses the following conventions:

- The terms "you" and "user" in this document refer to users of NYS PSM.
- Menus, menu options, tabs, fields, drop-down list options, buttons, links, and page names appear in **bold** font.
- References to chapters and section titles appear in italics and are cross-referenced (linked).
- A **Note**, presented in the following style:

> Provides additional important information for the task or page.

## Audience Requirements

This document is intended for providers with authorized access to the system.

# Chapter 1 - Overview

The New York State Provider Services Module (NYS PSM) uses a three-stage process to enroll Medicaid providers. Both State staff and provider users are involved in this process. If you are a provider and the State has authorized you to self-enroll, you will complete Stages 1 and 2 directly in the system. State staff manage Stage 3.

Below is an explanation of each stage:

**Stage 1 – Start an Enrollment Application**

In this first step, you will enter basic information about yourself or your organization. This includes contact details and identifiers required to create your application.

After you complete this step, the system will assign a unique Application ID. You will use this ID to:

- Track the status of your application.
- Return later to complete or update the application (as long as it has not yet been submitted).

The State does not begin reviewing the application during this stage, but you must complete it before moving on to Stage 2.

**Stage 2 – Complete the Enrollment Application**

This stage is the most comprehensive part of the enrollment process. You will provide detailed information related to your provider type, services offered, affiliations, and compliance with Medicaid program requirements. Providers can modify their enrollment application as long as the application status is "In Process."

Key features of this stage include:

- Milestone-Based Organization: The application is broken down into milestones, each containing logically grouped tasks and data entry sections.

- Required vs. Optional Fields: Each step clearly indicates whether the information is mandatory or optional.
- Progress Saving: You can save your progress at any time and return later to complete the application.
- Document Uploads: You may be asked to upload supporting documentation, such as licenses, certifications, or ownership disclosures.

Once all required information has been entered:

1. Review the application for accuracy.
2. Submit it to the State for review.

After submission:

- The application status changes to “In Review.”
- You can no longer make changes unless the State sends it back with a request for updates or corrections.

**Stage 3 – Enrollment Application Review and Determination:**

In this final stage, designated State staff will review your submitted application. During the review, they will:

- Verify that all information is accurate and complete.
- Confirm your eligibility and compliance with Medicaid program requirements.
- Request additional information or clarification, if necessary.

While your application is under review:

- The State may send notifications requesting documents or corrections. You should respond promptly to avoid delays.
- You can monitor the application's progress in the system using your Application ID.

When the State completes its review:

- You will receive a notification in the system and, if applicable, by email.
- If your enrollment is approved, the system will update your provider status to “Active,” and you may begin participating in the NYS Medicaid program.

# Chapter 2 - Getting Started

## 2.1 The User Interface

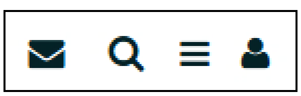
The system's user interface (UI) helps you complete your tasks quickly and efficiently. The UI has many features designed to improve productivity and reduce errors.

You will see four primary sections on most pages in the system:

### 2.1.1 Main Menu


The Main Menu displays at the top of the list pages and allows access to the different subsystems to which you have access.

### 2.1.2 Navigation Bar



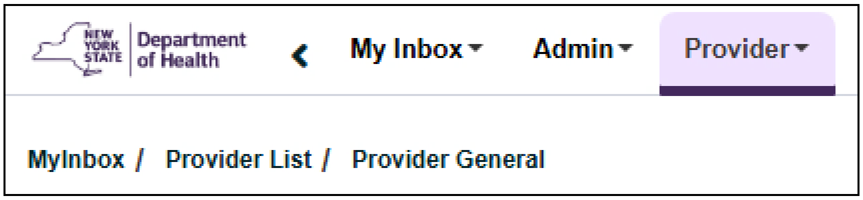
The Navigation Bar provides linked icons that enable you to conveniently access your inbox notifications, search the system, perform a series of quick actions, and view or change your profile and log out of the system.

From the **Quick Actions** menu, indicated by , you can:

- Add a page to your favorites.
- Print a page for your reference.
- Access online help.

- Access external links.
- Use the Notepad.

### 2.1.3 Breadcrumb Bar




The Breadcrumb Bar below the Main Menu and displays the names of the pages you have visited during your current session. The pages are links you can select to navigate back to the previous page if needed.

### 2.1.4 Workspace

The Workspace is the main area of the UI that displays the content of the current page and the actions you can perform.

## 2.2 Using My Inbox

In the system, you can view your messages and reminders. You can also forward messages to another system user.

### 2.2.1 View Messages and Reminders

1. From the **My Inbox** menu, select **My Inbox**.

   The **My Inbox** page opens.

2. Select a relevant **Alert Message** link.

   The **Message Details** page opens.

3. Read the message and select **Cancel** when you finish.

### 2.2.2 Forward Messages to Another User

1. From the **My Inbox** menu, select **My Inbox**.

   The **My Inbox** page opens.

2. Select a relevant **Alert Message** link.

   The **Message Details** page opens.

3. Select the lookup arrow to the right of the **Forward To** field.

   The **Forward To** page opens.

4. From the **Available Values** selection list, select the intended recipients and select the double right arrow to move your selections to the **Selected Values** selection list.

5. Select **OK** to return to the **Message Details** page where the list of recipients now display in the **Forward To** field.

6. Complete the remaining fields.

7. Select **Ok** to forward the message.

### 2.2.3 View My Notifications

From any page in the system, you can access your **Inbox Notifications List** page by selecting the letter icon (0) in the navigation banner. This page enables you to switch the page view from **Inbox Notifications** for viewing your received messages to **Sent Items** for viewing your outgoing messages. For outgoing messages, State users can only reply to a received message. Provider users can both reply to a received message and compose and send new messages as needed.

## 2.3 Accessing Your Notifications

The system enables you to view your list of received and replied notifications and delete notifications as needed. Provider users can also compose and send notifications as needed.

### 2.3.1 View Your Notifications

From any page in the system, you can access your **Inbox Notifications List** page by selecting the letter icon ( ) in the navigation banner. From this page, you can view your list of received and sent notifications, delete an item in the list, and compose and send a notification to another system user.

### 2.3.2 Changing the Page View

The **Inbox Notifications List** page opens initially to the **Inbox Notifications** page view, which shows your incoming notifications. To view your outgoing replies or outgoing messages, select **Sent Items** to switch to the **Sent Items** page view. To switch back to the **Inbox Notifications** page view, select **Inbox**.

### 2.3.3 View a Notification

Select the **Message** link to open the **Message Details** page where you can view the content of the notification. To reply to the message, select **Reply**, enter your message in the **Message** field, and select **Send**.

### 2.3.4 Compose and Send a Notification

1. On the **Inbox Notifications List** page, select **Compose**.

   The **Compose Message** page opens.

2. Select the **Subject** from the drop-down list.

3. Enter your message in the **Message** field. You can enter up to 4000 characters.
4. Select **Send**.

### 2.3.5 Delete a Notification

On the **Inbox Notifications List** page, select the page view that contains the message you want to delete. Select the checkbox for the applicable message and select **Delete**.

## 2.4 Using Filters

The system uses list pages to display a group of similar records in an organized manner. Sometimes these pages contain a large amount of records that display across multiple pages. You use the system's powerful filtering options to help narrow down the records you want to see on the list pages.

### 2.4.1 Filter a List Using a Single Criterion

For a standard search, you select an option from the **Filter By** drop-down list and enter a value in the corresponding field. You can also filter a list by using wildcards if you are unsure of the value for which you are searching. For example, if you are filtering member records by **First Name** and want to search for a member named Ashley, but are not sure whether it is spelled Ashley or Ashlee, you can enter "Ashl%" in the value field and the search will return all names starting with "Ashl."

1. From the first **Filter By** drop-down list, select the category.
2. In the field beside the category, enter the value on which to search.
3. Select **Go**.

   The relevant search results display in the list.

### 2.4.2 Filter a List Using Multiple Criteria

Depending on the list page, you may be able to filter by more than one category.

1. In the first **Filter by** drop-down list, select the category.
2. In the field beside the category, enter the value on which to search.
3. In the second **Filter By** drop-down list, select the second category and enter the corresponding value in the corresponding field.
4. Repeat these steps to use the remaining filter fields as needed.
5. Select **Go**.

   The list displays records that satisfy both the filters. Records that satisfy only one of the criteria are not displayed.

### 2.4.3 Save a Filter

If you use a particular filter regularly, you can save the filter for future use.

1. After selecting and entering the filter criteria, select **Save Filters**.
2. In the **Filter name** field, enter a name to identify the filter.
3. In the **Filter Description** field, enter a description about the filter.
4. Select **Save**.
5. To close the page, select **Close**.

   You can create and save multiple filters.

### 2.4.4 Use a Saved Filter

1. Select **My Filters**.
2. Select the filter to apply.

### 2.4.5 Rename a Filter

To rename a filter, you must recreate the filter and save it under a new name. You cannot rename an existing filter.

### 2.4.6 Delete a Filter

1. Select **My Filters**.
2. Select the remove icon next to the filter.

### 2.4.7 Sort a List

You can sort a list in ascending or descending order, alphabetically or numerically. To sort a list based on a column, select either the up arrow or down arrow icon next to the column name.

### 2.4.8 Navigate a List

You can navigate between list pages by using the navigation buttons located at the bottom-right corner of the list.

- To navigate to the first page, select **First**.
- To navigate to the last page, select **Last**.
- To navigate to the next page of the current list page, select **Next**.
- To navigate to the previous page of the current list page, select **Prev**.
- To navigate to a particular page, enter the desired page number in the field next to **View Page**, and then select **Go**.

## 2.5 Using the Quick Actions Menu

The options in the **Quick Actions** menu allow you to perform common actions across the application. To access this menu, select the ☰ icon.

### 2.5.1 Use Favorites

You can collect regularly used links under one menu, making them easier to find and access.

#### Add an Item to My Favorites

1. Select a subsystem menu from the **Main Menu**.
2. Next to the menu item, select the star icon.

   The selected item appears in the **Favorites** menu.

#### Access an Item from My Favorites

1. From the **Quick Actions** menu, select **Favorites**.
2. From the expanded list, select the applicable page.

#### Remove an Item from My Favorites

1. From the **Quick Actions** menu, select **Favorites**.
2. Next to the item, select the **Remove Favorite** icon.

### 2.5.2 Print the Current Window

1. On the Quick Access Bar, select **Print**.

   This opens a preview page.
2. On the preview page, select **Print page**.

   The current page of the application will print.
3. To exit the preview page, select **Close print preview**.

## 2.5.3 Access the Online Help

To access help for the page, select 

from the **Quick Actions** menu. On pages without a **Quick Actions** menu, simply select **Help**.

## 2.5.4 Open an External Link

The items in the **External Links** menu are documents and web pages that might be useful to you. These are resources outside the application. An administrator configures the links to the resources and you cannot edit them.

1. From the **Quick Actions** menu, select **External Links**.
2. Select the item to open.

   The link target opens in a new window.

## 2.5.5 Use the Notepad Tool

The **Notepad** tool allows you to save information that you might want to refer to complete a task. For example, you can temporarily store information, like an NPI or TCN. The system retains the information in Notepad only for the current session. When you log out, this information deletes.

### Add Notes

1. From the **Quick Actions** menu, select **Notepad**.
2. In the field, enter or edit the required information, and then select **Close**. The field resizes automatically to fit the content.

### Clear the Notepad

1. From the **Quick Actions** menu, select **Notepad**.
2. Select **Clear**.

   This clears all the information.

## 2.6 Viewing the Provider Portal Home Page

The **Provider Portal Home** page is the first page that appears when a provider signs into the system. This page displays the:

- Provider's National Provider Identifier (NPI).
- Provider's name.
- System notifications, if any.
- List of important alert messages in the **My Reminders** section. If there are too many messages, the user can use the filters to manage the list.
- Calendar with the current date selected.
- Interactive Chat icon at the bottom right corner for starting an interactive chat session with an agency representative.
- Letter icon ( ) in the navigation banner that enables you to view your notifications.

# Chapter 3 - Enrolling an Individual Provider

An Individual healthcare provider is a person who provides medical services to Medicaid patients. They might:

- Run their own business and bill the state directly for their services.
- Provide care under another provider who handles the billing.
- Be listed on claims in other roles.

Individual Providers include different applicant types, such as:

- Fee For Service (Billing)
- Ordering/Prescribing/Referring/Attending

All Individual Providers must have a National Provider Identifier (NPI).

> If an NPI already exists for the provider in eMedNY, any changes to the enrollment will need to be made within eMedNY.

These providers can become a Medicaid provider by completing the online enrollment process and submitting the required forms and documents. Authorized State users can enroll on behalf of a provider. Once the application is submitted, it is reviewed by the state.

## Process Overview

1. From the **Provider** menu, select **New Enrollment**.
2. Select the **Individual** option and then select **Submit**.
3. After reading through the application instructions, select **Proceed**.

   The **Application Enrollment** page opens.

4. Complete the required details on the page and select **Generate Application**.

   The system displays a confirmation message that the application was created. Take note of the Application ID for later use.

5. Select **Go to Application** to start completing the enrollment details from the **Enroll Provider** page.

## 3.1 Adding Basic Information

The first provider enrollment step of the application is to enter the required basic information. Upon completing this step, the system validates your information and creates a 14-digit Application ID, which is required for completing and tracking the rest of the enrollment process.

> If the combination of National Provider Identifier (NPI) and Social Security Number (SSN)/Employer Identification Number (EIN) already exists in the system, then the Application ID is not generated and the enrollment process stops. The system will provide an informational message indicating what action to take next.

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

### 3.1.1 Individual Providers

1. On the **Enroll Provider - Individual** page, select the **Provider Basic Information** link.

   The **Basic Information** page opens.

2. From the **Applicant Type** drop-down list, select one of the following:

- **Fee For Service (Billing)**
- **Ordering/Prescribing/Referring/Attending**

3. Provide the appropriate details in all required fields on the page.
4. Select **Save**.

   The Application ID is generated and the system returns to the **Enroll Provider - Individual** page.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment:

- For Individual O/P/R/A Providers, your next step is adding spe-cialites/licenses/certifications.
- For Individual FFS Providers, your next step is adding federal tax details.

## 3.2 Adding Federal Tax Details

As part of the enrollment process, you must provide the federal tax information of the enrolling provider. To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.
2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.
3. Select the **Add Federal Tax Details** link.

   The **Federal Tax List** page opens.

## 3.2.1 Add Federal Tax

1. On the **Federal Tax List** page, select the **Tax Form** option and then **Next**.

   The **Federal Tax Details** page opens.

2. Select the **Ownership Type**.
3. Select the **Profit Status**.
4. Enter the **EIN/FEIN**.
5. Enter or select the **Start Date** and **End Date**.
6. In the **Corporate Address** section, enter the **Address Line 1** and **Zip Code** fields, and select **Validate Address**.

   If validated, the remaining address fields are automatically populated.

7. Select **Save** to save your entries.

   > You must save your entries in the **Tax Form Details** and **Corporate Address** sections before adding your tax document(s) to the **Supporting Documents** section.

8. In the **Supporting Documents** section, upload the supporting tax document as follows:
   a. Select **Add**.
   b. Select the **Document Type**.
   c. Select the **Document Name**.
   d. Select **Choose**.
   e. Find and select the document on your local computer and select **Open**.
   f. Enter your remarks in the **Remarks** field.
   g. Select **Upload Document**.

### 3.2.2 Modify Federal Tax

1. On the **Federal Tax List** page, select the edit icon in the **Actions** column.

   The **Federal Tax Details** page opens.

2. Update the fields as needed.

3. Select **Save**.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment:

- For Individual FFS Providers, your next step is adding specialites/licenses/certifications.

## 3.3 Adding Specialties/Licenses/Certifications

As part of the enrollment process, it is necessary for providers of medical services to enter their specialties, subspecialties, licenses, certification details, and supporting documents.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Specialties/Licenses/Certifications** link.

   The **Provider Type/Specialty/Subspecialty** page opens.

### 3.3.1 Add a Specialty/Subspecialty

1. In the **Provider Type/Specialty/Subspecialty** section, select **Add**.

   The **Add Specialty/Subspecialty** page opens.

A provider can have multiple specialties.

2. Select the **Provider Type** and **Specialty**.

   The **Available Subspecialty** selection list under the **Add Subspecialty** section populates the subspecialties associated with the specialty.

3. If needed, update the **Start Date**.

4. In the **Add Subspecialty** section, select the subspecialty from the **Available Subspecialty** selection list and select the double right arrow. You can select multiple subspecialties by holding the **CTRL** key during selection.

   The subspecialty(ies) move to the **Associated Subspecialty** selection list. If you want to move a subspecialty back to the **Available Subspecialty** selection list, select it from the **Associated Subspecialty** selection list and select the double left arrow.

5. Select **Add**.

   The **Provider Type** grid displays at the bottom of the page showing your selections. If you need to remove a subspecialty, select the **Delete** button on that line.

6. When finished, select **OK** to return to the **Provider Type/Specialty/Subspecialty** page.

   To add more specialties, repeat steps 1 through 6.

### 3.3.2 Associate a Primary Specialty

To associate a primary specialty, you must have added at least one specialty.

1. In the **Provider Type/Specialty/Subspecialty** section, select the checkbox beside the provider type/specialty/subspecialty record.
2. Select **Primary Specialty**.

   You will receive the message, "Are you sure you want to flag this as primary specialty?"
3. Select **OK** in the message.

   The record is flagged as the primary specialty in the list.

### 3.3.3 Modify a Specialty/Subspecialty

1. On the **Provider Type/Specialty/Subspecialty List** page, in the **Provider Type/Specialty/Subspecialty** section, select the relevant **Provider Type** link.

   The **Modify Specialty/Subspecialty** page opens.
2. Make the necessary changes and select **Save**.
3. To view the history of changes made, select **View History**.
4. To return to the **Provider Type/Specialty/Subspecialty List** page, select **Close**.

### 3.3.4 Delete a Specialty/Subspecialty

1. In the **Provider Type/Specialty/Subspecialty** section, select the checkbox beside the specialty/subspecialty you want to delete.
2. Select **Delete**.

### 3.3.5 Add a License or Certificate

A provider can add multiple credentials.

1. In the **License/Certification** section, select **Add**.

   The **Add License/Certification** page opens.

2. Select the license/certification type from the **License/Certification** drop-down list.
3. Enter the license/certification number in the **License Certification #** field.
4. If applicable, select the licensing state from the **State** drop-down list.
5. If applicable, select **Yes** or **No** for **Public Board Orders**.
6. Enter dates in the **Effective Date** and **End Date** fields.
7. If applicable, select the specialty/subspecialty from the **Specialty/Subspecialty** drop-down list.
8. When finished, select **Confirm License/Certification**.

   When confirmed, you will see **Yes** populated for the **Valid License/Certification** value.

9. Select **OK**.

To add additional licenses or certifications, repeat steps 1 - 7.

You can also select **View Screening Result** to view the screening result in Provider Credentialing Service (PCS).

### 3.3.6 Modify a License or Certificate

1. In the **License/Certification** section, select the link for the license or certificate you want to modify.

   The **Modify License/Certification** page opens.

2. Update the fields as needed.
3. When finished, select **Confirm License/Certification**.

   When confirmed, you will see **Yes** populated for the **Valid License/Certification** value.

4. Select **OK**.

### 3.3.7 Delete a License or Certificate

1. In the **License/Certification** section, select the checkbox beside the license or certificate you want to delete.
2. Select **Delete**.

> To remove an expired license or certificate, set an end date instead of deleting it.

### 3.3.8 Add a Supporting Document

1. In the **Supporting Documents** section, select the document type from the **Document Type** drop-down list.
2. Select the document name from the **Document Name** drop-down list.
3. Under the **File Name** column, select the paperclip icon.
4. At the **Open** window, locate and select the supporting document and select **Open**.
5. Enter your remarks in the **Remarks** field.
6. Select the **Save** button in the **Supporting Documents** section.

   The document is uploaded and now appears in the **Supporting Documents** list.
7. When finished, select **Close**.

### 3.3.9 Delete a Supporting Document

1. In the **Supporting Documents** section, select the checkbox beside the document you want to delete.
2. Select **Delete**.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment: adding education/training/work history.

## 3.4 Adding Education/Training/Work History

As part of the enrollment process, you must provide the education, training, and work history information of the enrolling provider. To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Education/Training/Work History** link.

   The **Education/Training/Work History** page opens.

### 3.4.1 Add Education

1. In the **Education** section, select **Add**.

   The **Add Education Details** page opens.

2. Provide the required details.

3. When finished, select **OK**.

   To add additional education details, repeat steps 1 through 3.

### 3.4.2 Add Training

1. In the **Training** section, select **Add**.

   The **Add Training Details** page opens.

2. Provide the required details.

3. When finished, select **OK**.

   To add additional training details, repeat steps 1 through 3.

### 3.4.3 Add Work History

1. In the **Work History** section, select **Add**.

   The **Add Work History** page opens.

2. Provide the required details.
3. When finished, select **OK**.

   To add additional work history details, repeat steps 1 through 3.

### 3.4.4 Add a Supporting Document

1. In the **Supporting Documents** section, select the document type from the **Document Type** drop-down list.
2. Select the document name from the **Document Name** drop-down list.
3. Under the **File Name** column, select the paperclip icon.
4. In the **Open** window, locate and select the supporting document and select **Open**.
5. Enter your remarks in the **Remarks** field.
6. Select **Save** in the **Supporting Documents** section. The supporting document is uploaded and now appears in the **Supporting Documents** list.
7. When finished, select **Close**.

To delete a supporting document, select the checkbox beside the document record and select **Delete**.

### 3.4.5 Modify Education

1. In the **Education** section, select the relevant **Level of Education** link to modify.

The **Manage Education Details** page opens.

2. Update the fields as needed.
3. Select **Save** after making the updates.
4. To return to the **Education/Training/Work History List for Enrollment** page, select **Close**.

Select **View History** to view the history of changes made.

### 3.4.6 Modify Training

1. In the **Training** section, select the relevant **Program Type** link to modify.

   The **Manage Training Details** page opens.

2. Update the fields as needed.
3. Select **Save** after making the updates.
4. To return to the **Education/Training/Work History List for Enrollment** page, select **Close**.

### 3.4.7 Modify Work History

1. In the **Work History** section, select the relevant **Practice/Employer** link to modify.

   The **Manage Work History** page opens.

2. Update the fields as needed.
3. Select **Save** after making the updates.

4. To return to the **Education/Training/Work History List for Enrollment** page, select **Close**.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment:

- For Individual O/P/R/A Providers, your next step is adding locations/doing business as.
- For Individual FFS Providers, your next step is adding payment details.

# 3.5 Adding Payment Details

The procedures below describe how to add or modify payment details for your provider enrollment. Adding payment details is optional for Individual FFS (Billing) Providers.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Add Payment Details** link.

   The **Payment Details List** page opens.

## 3.5.1 Add Payment Details

1. Select **Add**.

   The **Add Payment Details** page opens.

2. In the **Mode of Payment** section, select **Electronic Funds Transfer (EFT)** or **Paper Check** for the payment method.

If you select **Electronic Funds Transfer (EFT)**, the page refreshes and displays additional sections for you to complete for EFT payments.

3. If you selected **Paper Check** for the payment method, enter the **Start Date** and **End Date** for the method and continue to the next step. If you selected **Electronic Funds Transfer (EFT)**, complete the necessary information in the Financial Institution Information and EFT Agreement sections.
4. In the **Address Details** section:
   a. Complete the required fields.
   b. Enter the **Address Line 1** and **Zip Code** then, select **Validate Address**.
   c. Select **Save**.
5. In the **Supporting Documents** section:
   a. Select from the **Document Type** drop-down list the type of supporting document you will upload.
   b. Select the document name from the **Document Name** drop-down list.
   c. Under the **File Name** column, select the paperclip icon.
   d. At the **Open** window, locate and select the supporting document and select **Open**.
   e. Enter your remarks in the **Remarks** field.
   f. Select **Save** in the **Supporting Documents** section.

      The document uploads and appears in the list.
6. When finished, select **OK**.

   The **Payment Details** list page displays the results.

### 3.5.2 Modify Payment Details

1. From the **Payment Details** list page, select the link under the **Payment Method** column for the payment method you want to update.

   The **Modify Payment Details** page opens.

2. Enter or update the information on this page as needed.

3. Select **Save**.

#### What's Next?

Select **Next Step** to move to the next step of your enrollment:

- For Individual FFS Providers, your next step is adding locations/doing business as.

## 3.6 Adding Locations/Doing Business As

As part of enrolling, you will need to provide the addresses where the provider works. This includes the main office address, the pay-to address, and the mailing address, along with contact details for each. These can all be the same address, if applicable.

Depending on your provider enrollment type, you may also need to give extra details for each location—like office or facility information, hospital admitting privileges, service area details, or program information.

When you are on the **Location Details** page, you will see a menu on the left side. Use this menu to add or link any extra information needed for the location you are working on. The menu options will be different depending on your provider enrollment type.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Add Locations/Doing Business As** link.

   The **Location** page opens.

### 3.6.1 View a Location Summary

1. On the **Locations** page, select the **View Summary** icon under the **Actions** column.

   The **Location Summary** page opens.

   Or

   Select the **Edit** icon under the **Actions** column.

   The **Location Details** page opens.

2. Select the **View Summary** link.

   The **Location Summary** page opens

### 3.6.2 Add a Primary Location Address

1. On the **Locations** page, select **Add**.

   The **Provider Location** page opens.

2. From the **Location Type** drop-down list, select **Primary Practice Location**.

3. Enter the **Doing Business As** title, if applicable.

4. Enter the address in the **Location Address** section. To add the address, enter the street or mailing address in the **Address Line 1** field, enter the Zip Code in the **Zip Code** field, and select **Validate Address**.

   The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

5. Complete the information in the remaining sections according to your provider enrollment type:
    - **Communication Details**
    - **Office Information**
    - **Additional Information**
6. Select **OK**.

### 3.6.3 Add Communication Details

1. In the **Communication Details** section, enter the phone numbers, extensions, fax number, email addresses, and web address in the appropriate fields.
2. Select **Email** or **Standard Mail** from the **Communication Preference** drop-down list.

### 3.6.4 Add Office Information

1. Complete the fields in this section as displayed.
2. Under **Office Hours**, select the checkbox for each day the office is open and then select the opening and closing hours, respectively, from the two drop-down lists.
3. Under **Languages Spoken**, select the language(s) spoken in the **Available Languages** selection list, using the **CTRL** key for multiple selections. Select the double right arrow to move your selection(s) to the **Selected Languages** selection list.
4. For the **American Sign Language (ASL)** option, select **Yes** or **No**.
5. If applicable, enter the **Better Health Care Program ID**.

### 3.6.5 Add Servicing Area

1. To enter information in this section, select **Yes** for the **Do you want to provide Service Area?** question.

   The **County** and **Servicing Area** selection lists display.

2. Select your servicing county or counties from the **County** selection list and select the double right arrow to move the county to the **Servicing Area** selection list. You can multi-select counties by holding the **CTRL** key during selection.

### 3.6.6 Modify a Primary Location Address

1. On the **Locations** page, select the primary location link.

   The **Locations Details** page opens.

2. Update the **Location Details** and **Contact Information** sections as needed.
3. To update the address, select **Address** from the left menu.

   The **Addresses** page opens.

4. Select the **Location** link under the **Address Type** column for the address you want to update.

   The **Modify Address** page opens.

5. Update the address fields as needed and select **Validate Address**.

   The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

6. Select **Save**.
7. Select **Close** to return to the **Locations Details** page.

## 3.6.7 Add Pay-To and Correspondence Addresses

To complete the process of adding a provider's address, you must provide the addresses for pay-to and correspondence in addition to the address for the primary practice location.

1. On the **Locations** page, select the relevant location link.
2. On the **Location Details** page, select **Address** from the left menu.

   The **Addresses** page opens.
3. Select **Add Address**.

   The **Add Address** page opens.
4. From the **Type of Address** drop-down list, select the appropriate address type you want to add.

   > If the location address is the same as the primary practice location, select the **Copy This Location Address** option. The address details are automatically populated in the relevant fields.
5. If you are adding a different location, enter the **Address Line** and **Zip Code** fields and then select **Validate Address** to automatically populate the **City/Town**, **State/Province**, **County**, and **Country** fields.
6. When finished, select **OK** to return to the **Location Details** page.

   The **Address** section displays the new addresses.
7. To add the other address types, select **Add Address**, and repeat the previous steps.

Only one pay-to address can be specified for a given tax ID regardless of the number of applications having different NPIs that exist in the system for that tax ID.

### 3.6.8 Modify Pay-To and Correspondence Addresses

1. On the **Location Details** page, select **Address** from the left menu.
2. On the **Addresses** page, select the applicable link under the **Address Type** column.

   The **Modify Address** page opens.
3. Update the fields as needed and select **Save**.
4. Select **Close** to return to the **Location Details** page.

### 3.6.9 Associate a Provider Type/Specialty/Subspecialty to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.
2. Select **PT/SP/SSP** from the left menu.

   The **Provider Type/Specialty/Subspecialty** page opens.
3. Select **Associate Provider Type/Specialty/Subspecialty**.

   The **Associate Provider Type/Specialty/Subspecialty** page opens.
4. Select the **Start Date** and **End Date**.
5. Select an item or items from the **Available Subspecialty** selection list and select the double right arrow. The values move to the **Associated Sub-specialty** selection list.

You cannot enter the same PT/SP/SSP for two locations with the same address.

6. Select **OK** to return to the **Provider Type/Specialty/Subspecialty** page where the new subspecialties display.

   A green checkmark appears beside the **PT/SP/SSP** item in the left menu, indicating the information has been added.

## 3.6.10 Add Contacts to a Location

This procedure enables you to add information for individual contacts at FAO, Group, or Atypical Agency organizations.

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Contacts**.

   The **Contacts** page opens.

3. Select **Add Contacts**.

   The **Add Contact** page opens.

4. Select the **Contact Type**.
5. Select the **Contact Title**.
6. Enter the contact's information in the appropriate fields.
7. Enter the **Start Date** and **End Date**.

8. Select **OK** to return to the **Contacts** page where the new contact is now listed.

   A green checkmark appears beside the **Contacts** item in the left menu, indicating the information has been added.

### 3.6.11 Add Insurance Details to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Insurance**.

   The **Insurance Details** page opens.

3. Select **Add Insurance**.

   The **Add Insurance** page opens.

4. Select the **Insurance Type**.

5. Enter the policy information in the appropriate fields of the **Insurance Information** section.

6. For the address fields, enter the **Address Line** and **Zip Code** fields for the insurance company and select **Validate Address** to automatically populate the **City/Town**, **State/Province**, **County**, and **Country** fields.

7. Select **OK** to return to the **Insurance Details** page where the added insurance is now listed.

   A green checkmark appears beside the **Insurance** item in the left menu, indicating the information has been added.

### 3.6.12 Add a License or Certification to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **License/Certification**.

   The **License/Certification** page opens.

3. Select **Add License/Certification**.

   The **Add License/Certification for Enrollment** page opens.

4. Select the **Licensing Board/Certifying Body**.

5. Select the **License/Certification Type**.

6. Enter the **License/Certification #**.

7. Enter the **Start Date** and **End Date**.

8. Select **Confirm License/Certification** to confirm the license or certification. If successful, a confirmation message is displayed on the page.

9. As needed, select **View Screening Result** to view the results of the license/certification screening.

10. Select **OK** to return to the **License/Certification** page where the confirmed license or certification is now listed.

    A green checkmark appears beside the **License/Certification** item in the left menu, indicating the information has been added.

### 3.6.13 Add Payment Details to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Payment Details**.

   The **Payment Details** page opens.

3. Select **Associate Payment Details**.

   The **Associate Payment Details** page opens.

4. Select the **Payment Method**.

5. Select the **Financial Institution Name**.

6. Enter the **Start Date** and **End Date**.

7. Select **OK** to return to the **Payment Details** page where the payment method is now listed.

| |
|---|
| Only one payment method can be associated to a location. |

A green checkmark appears beside the **Insurance** item in the left menu, indicating the information has been added.

### 3.6.14 Add or Delete a Supporting Document

Authorized providers and State users can manage the supporting documents in the **Supporting Documents** area of the left menu.

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Supporting Documents**.

   The **Supporting Documents List** page opens.

3. To upload a supporting document, select the paperclip icon in the **File Name** column.

   The system displays a window where you can choose the file to upload.

4. Find and select the file to upload and select **Open**.

   At the **Supporting Documents** page, the file name now appears in the **File Name** field.

5. Select the document type and document name from the **Document Type** and **Document Name** drop-down lists.

6. Enter a remark in the **Remarks** field as needed.

7. Select **Save**.

   The document is now shown in the list.

To delete a supporting document, select the appropriate checkbox in the first column for the document you want to delete and select **Delete**.

**What's Next?**

For Individual Providers, the next step of your enrollment associating a Billing Provider/Other Associations.

## 3.7 Associating a Billing Provider/Other Associations

As part of the enrollment process, providers can associate one or more Billing Providers who will be submitting claims on their behalf.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Associate Billing Provider/Other Associations** link.

   The **Billing Provider/Other Associations** page opens.

### 3.7.1 Associate a Billing Provider

A provider can associate to multiple Billing Providers.

1. On the **Billing Provider/Other Associations** page, select **Add**.

   The **Associate Billing Provider/Other Associations** page opens.

2. Select **Billing to Billing**, **Billing to Servicing**, or **Servicing to Billing** from the **Association Type** drop-down list.

3. Select the location from the **Location** drop-down list.

4. Select **Application ID**, **NPI**, or **Provider ID** from the **Search By** drop-down list.

5. Enter the Billing or Servicing Provider's NPI or Provider ID in the **ID** field and press the **Tab** key.

   The page refreshes and displays the provider's name and automatically populates the **Start Date** fields and, if applicable, the **Available Specialty** selection list.

6. If needed, update the **Start Date** field and enter or select the end date in the **End Date** field.

7. If you are associating a Servicing Provider, complete the remaining fields:

   a. If applicable, select the **Accept New Clients** checkbox.

   b. Select and move the specialty from the **Available Specialty** selection list to the **Associated Specialty** selection list.

c. For the **Available Hours** fields, select the checkbox for each day the office is open and then select the opening and closing hours, respectively, from the two drop-down lists.

8. If you are associating multiple providers, select **Save** to save the current information you entered, clear the fields, and then proceed to associate another provider.

### 3.7.2 Modify a Billing Provider

1. On the **Billing Provider/Other Associations** page, in the **Provider ID** column, select the link of the provider you want to modify.

   The **Manage Billing Provider/Other Associations** page.

2. Modify the details as needed.
3. Select **Save**.

#### What's Next?

Select **Next Step** to move to the next step of your enrollment:

- For Individual O/P/R/A Providers, your next step is associating an MCO plan.
- For Individual FFS (Billing) Providers, your next step is associating an ETIN.

## 3.8 Associating an ETIN

During provider enrollment, you can associate an Electronic Transmitter Identification Number (ETIN) to the provider. Only one ETIN can be associated to a provider. Part of the association includes uploading supporting documents.

> Only Individual FFS (Billing) Providers can associate an ETIN.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Associate ETIN** link.

   The **Associate ETIN List** page opens.

4. On the **Associate ETIN List** page, select **Add**.

   The **Associate ETIN Details** page opens.

5. Select **New ETIN** as the **Association Type**. Then, select **Save Details**.

6. In the **Supporting Documents** section, select **Add**.

   The **Add Supporting Documents** page opens.

7. Select the **Document Type** and **Document Name**.

8. Select **Choose** to search for and select the document to upload from your computer.

9. Select **Upload Document**.

10. Select **Save**.

The ETIN details cannot be modified; however, you can add, view, and delete supporting documents.

### What's Next?

Select **Next Step** to move to the next step of your enrollment: associating an MCO plan.

# 3.9 Associating an MCO Plan

If the provider is associated with a Managed Care Organization (MCO) plan, you must add these details while enrolling. You use the **MCO Plan List** page to add this information. To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Associate MCO Plan** link.

   The **MCO Plan List** page opens.

## 3.9.1 Associate an MCO Plan

A provider can associate to multiple MCO plans.

1. On the **MCO Plan List** page, select **Add**.

   The **Associate MCO Plan** page opens.

2. To search for an MCO plan, select **Confirm/Search Plan**.

   The **MCO Plan Search List** page opens.

3. Select the appropriate plan and choose **Select**.

   You are returned to the **Associate Plan List** page.

4. In the **Supporting Documents** section, select the **Document Type** and **Document Name**.

5. Select the attachment icon to search for and select the document you want to attach.
6. Enter any **Remarks** as necessary for the document.
7. Select **Save**.
8. Select **OK**.

To associate more MCO Plans, repeat these steps.

### 3.9.2 Modify an MCO Plan

1. On the **MCO Plan List** page, in the **Plan ID** column, select the Plan ID to modify.

   The **Modify MCO Plan Association** page opens.
2. Update the editable fields as needed.
3. When finished, select **Save**.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment: adding provider controlling interest and ownership details.

## 3.10 Adding Provider Controlling Interest and Ownership Details

As part of the enrollment process, you must include the ownership details of the provider organization. If the provider organization has multiple owners, it is necessary to provide details of all the owners, how much of the company they own, and their relationship to the other owners.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Add Provider Controlling Interest/Ownership Details** link.

   The **Provider Controlling Interest/Ownership List** page opens.

### 3.10.1 Add Owner

1. On the **Provider Controlling Interest/Ownership List** page, select **Add**.

   The **Owner Detail (Enrollment)** page opens.

2. Select the owner type from the **Type** drop-down list.

| |
|---|
| One of the owners must be classified as a Managing Employee. |

3. Provide the appropriate details in all the required fields.

4. To add the address, enter the street or mailing address in the **Address Line 1** box, enter the Zip Code in the **Zip Code** field, and select **Validate Address**.

   The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

5. Select **Save**.

   You return to the **Provider Controlling Interest/Ownership List** page where the added owner is now listed.

To add additional owners, repeat these steps as many times as needed.

## 3.10.2 Import Owner

1. On the **Provider Controlling Interest/Ownership List** page, select **Import Owner**.

   The **Import Owner from Other Enrollment** page opens.

2. Select the **NPI** or **Provider ID** option.

3. To search for the provider, enter the provider's NPI or Provider ID, Zip Code, and SSN/EIN/FEIN in the appropriate fields, and select the owner type from the drop-down list.

4. Select **Search**.

   The page refreshes and displays the search results in the **Owners Available to Import** section.

5. Do one of the following:

   a. Select the checkbox for an owner you want to import and select **OK**.

   b. Select **Import All** to import all owners shown in the list.

   You return to the **Owners List** page where the imported users display.

## 3.10.3 Identify Owner Relationships

1. On the **Provider Controlling Interest/Ownership List** page, select **Manage Relationships**.

   The **Add Relationship** page opens. The owners are listed in expandable sections where you select each owner and then indicate the relationship of the owner to each other owner and vice versa.

2. Select the **Yes** or **No** option for **Do any of the Owners have the following relationship (Daughter, Daughter-In Law, Father, Father-In Law, Mother, Mother-In Law, Sibling, Son, Son-In Law, Self, Spouse)?** question.

3. Select **Save**.

   If you selected **No**, the page defaults all of the **Relation to *<Selected Owner>*** and **Relation to Assoc. Owner** fields on the page to **None**. Skip to step 6.

4. If you selected **Yes**, for each owner do the following:

   a. From the **Relation to *<Selected Owner>*** drop-down list, select the relation of the associated owner to the currently selected owner.

   b. From the **Relation to Assoc. Owner** drop-down list, select the relation of the currently selected owner to the associated owner.

5. Select **Save**.

6. Select **Close**.

## 3.10.4 Complete the Owners Adverse Action Information

1. On the **Provider Controlling Interest/Ownership List** page, select **Adverse Action**.

   The **Owners with Adverse Action** page opens.

2. For each owner, select **Yes** or **No** from the **Response** drop-down list and add comments as needed.

3. When finished, select **OK**.

### 3.10.5 Add Other Medicaid/Medicare Entities

1. On the **Provider Controlling Interest/Ownership List** page, in the **List Ownership in other Disclosing Entities reimbursable by Medicaid and/or Medicare** section, select **Add Other Owned Entity**.

   The **Add Provider Controlling Interest/Ownership in Other Medicaid/Medicare Entities** page opens.

2. Provide the required details.
3. To add the address, enter the street or mailing address in the **Address Line 1** field, enter the **Zip Code**, and select **Validate Address**.

   The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

4. Select **Save**.

To add more owned entities, repeat these steps as many times as needed.

### 3.10.6 Modify Owner Details

1. On the **Provider Controlling Interest/Ownership List** page, in the **Actions** column, select the edit icon.

   The **Modify Provider Controlling Interest/Ownership** page opens.

2. Update the fields as needed.
3. Select **Save**.

### 3.10.7 Modify Other Owned Entities

1. On the **Provider Controlling Interest/Ownership List** page, in the **List Ownership in other Disclosed Entities reimbursable by Medicaid and/or Medicare** section, select an **EIN/FEIN** link to modify.

The **Modify Provider Controlling Interest/Ownership in Other Medicaid/Medicare Entities** page opens.

2. Update the fields as needed.
3. Select **Save**.

To modify more owned entities, repeat these steps.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment: completing the enrollment checklist.

## 3.11 Completing the Enrollment Checklist

The enrollment checklist enables you to record answers to the list of questions specified by the state. All questions must be answered with **Yes** or **No**. Comment boxes are provided to enter explanatory comments where your answer requires this information.

### Complete the Enrollment Checklist

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Complete Enrollment Checklist** link.

   The **Complete Enrollment Checklist** page opens.

4. Answer each question in the checklist by selecting the appropriate **Yes** or **No** option.

> For specific questions, you will be required to upload documents if you respond with a **Yes**. When multiple checklist questions require

the same document, you only need to upload that document once.

You can upload the documents in the next step of the enrollment.

5. Select **Next** to navigate to the next page of the checklist.
6. When finished with your responses, select **Save**.

**What's Next?**

Select **Next Step** to move to the next step of your enrollment: adding supporting documents.

## 3.12 Adding Supporting Documents

Some documents may be required as part of a provider enrollment application. You may need to upload required documents depending on the responses you provide on the enrollment checklist.

A provider can submit multiple documents.

To add this information, follow the steps below:

### Upload Documents

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Add Supporting Documents** link.

   The **Add Supporting Documents** page opens.

4. Select **Add**.

   The **Upload Document List** page opens.

5. Under the **Additional Documents** section, select the **Document Type** and **Document Name**.

6. Select the paper clip icon.

7. Find and select the file to upload and select **Open**.

8. If needed, enter remarks about the document in the **Remarks** field.

9. When finished, select **Save**.

10. Select **Close** to exit.

**What's Next?**

Select **Next Step** to submit the enrollment application.

## 3.13 Submitting the Enrollment Application for Approval

The final step in the provider enrollment process is submitting the application for approval. You must accept the terms and conditions to submit the application.

> An application with an "In Process" status remains available in the staging area for 10 calendar days so that you can complete the enrollment and submit the application. After 10 calendar days, you will receive an email notification when the system purges the application.

To add this information, follow the steps below:

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. Select the **Submit Enrollment Application for Approval** link.

   The **Submit Enrollment Application for Approval** page opens.

4. Read through the terms and conditions.

5. At the bottom of the page, select the checkbox to accept the terms and conditions and select **Submit**.

   The System sends the provider's information to PCS for screening. Based on the results, the System creates a screening status indicator. The application is submitted for approval and assigned a status of "Submitted."

   A message displays confirming your application has been successfully submitted. Use the Application Number provided to track the application for future purposes.

# Chapter 4 - Working with Applications

## 4.1 Tracking an Application

After you provide the mandatory information to start the enrollment application, the system assigns a unique Application ID to your application. You use this ID to return to the application and make changes until you are ready to submit it for State review and approval.

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

## 4.2 Canceling an Application

The system enables authorized users to cancel the provider enrollment application. You can perform this action when the application is in "In Review" or "Submitted" status.

1. From the **Provider** menu, select **Track Application**.

   The **Track Application** page opens.

2. Select the link under the **Application ID** column.

   The relevant **Enroll Provider** page opens.

3. From the **Options** menu, select **Cancel Application**. This field is enabled only for applications with "In Review" or "Submitted" status.

   The **Cancellation Request** page opens.

# Chapter 5 - Managing Individual Providers

In the system, you can manage the information entered for an active Individual Provider.

To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

## 5.0.1 Modify a Provider's Details in Provider View

1. On the **View/Update Provider Data - Individual** page, in the **Step** column, select the step to modify.
2. Make the required modifications, and then select **Save**.
3. To close the **View/Update Provider Data - Individual** page, select **Close**.

## 5.0.2 Undo Changes Made in the Provider View

If you need to undo the changes you made to one or more steps on the **View/Update Provider Data - Individual** page, you can do so by using the **Undo Update** button.

1. Select the steps for which you want to undo the changes.
2. Select **Undo Update**.

> You can only undo modifications for steps with an "Updated" Modification Status.

The system removes the changes.

### 5.0.3 View Enrollment Instructions

1. On the **View/Update Provider Data - Individual** page, select **Enrollment Instructions**.

   The **Manage Required Credential for Specialties** page opens. From here, you can view the enrollment credentials for the provider including documents, licenses and certifications, education, and training.

2. When you finish viewing the details, select **Cancel**.

## 5.1 Managing Basic Information

In the system, you can add or update the basic information for an active provider. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Provider Basic Information** link.

   The **Provider Details** page opens.

### 5.1.1 Individual Providers

1. On the **View/Update Provider Data - Individual** page, select the **Provider Basic Information** link.

   The **Provider Details** page opens.

2. Enter the appropriate details in the required fields on the page.

3. To add the address, enter the street or mailing address in the **Address Line 1** box, enter the Zip Code in the **Zip Code** field, and select **Validate Address**.

   If validated, the system auto-populates the **City/Town**, **State/Province**, **County**, and **Country** fields. If the validation failed, check to ensure that you have provided the correct information.

4. Verify that the information you entered is correct and select **Confirm**.

5. Select **Finish**.

   The system returns to the **View/Update Provider Data - Individual** page with the Modification Status for the provider changed to "Updated."

## 5.2 Managing Federal Tax Details

The system allows you to modify the federal tax details for an active provider. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Federal Tax Details** link.

   The **Manage Federal Tax Details** page opens.

### 5.2.1 Add Federal Tax

1. On the **Manage Federal Tax Details** page, from the **Federal Tax Form** column, select the relevant **W-9 Form** link.

   The **Add Federal Tax** page opens.

2. Provide the required details.

3. When finished, select **OK**.

   To add additional federal tax details, repeat steps 1 through 3.

### 5.2.2 Modify Federal Tax

1. On the **Manage Federal Tax Details** page, from the **Federal Tax Form** column, select the relevant **W-9 Form** link.

   The **Modify Federal Tax** page opens.

2. Update the fields as needed.

3. Select **Save** after making the updates.

## 5.3 Managing Specialties/Licenses/Certifications

The system allows you to update the specialty/subspecialty, license/certification, hospital admitting privileges, and supporting documents for an active provider. Providers can update their own information. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Inform-ation**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Specialties/Licenses/Certifications** link.

   The **Provider Type/Specialty/Subspecialty List** page opens.

### 5.3.1 Modify a Specialty/Subspecialty

1. On the **Provider Type/Specialty/Subspecialty List** page, in the **Provider Type/Specialty/Subspecialty** section, select the relevant **Provider Type** link.

   The **Modify Specialty/Subspecialty** page opens.

2. Make the necessary changes and select **Save**.
3. To view the history of changes made, select **View History**.
4. To return to the **Provider Type/Specialty/Subspecialty List** page, select **Close**.

### 5.3.2 Modify the Primary Specialty

1. On the **Provider Type/Specialty/Subspecialty List** page, in the **Provider Type/Specialty/Subspecialty** section, select the checkbox beside the applicable record.
2. Select **Primary Specialty**.

   You will receive the message, "Are you sure you want to flag this as primary specialty?"
3. Select **OK** in the message.

   The record is flagged as the primary specialty in the list.

### 5.3.3 Add a Specialty/Subspecialty

1. On the **Provider Type/Specialty/Subspecialty List** page, in the **Provider Type/Specialty/Subspecialty** section, select **Add**.

   The **Add Specialty/Subspecialty** page opens.
2. Provide the appropriate details in the required fields.
3. If the specialty has subspecialties related to it, in the **Add Subspecialty** section, select the appropriate subspecialty from the **Available Subspecialty** selection list and select the double right arrow. You can select more than one value by holding the **CTRL** key during selection.

   The values move to the **Associated Subspecialty** selection list.

4. Select the location for the subspecialty in the **Location** selection list. You can select multiple locations by holding the **CTRL** key during selection.
5. Select **Add**.

   The **Location** grid displays at the bottom of the page showing your selections. If you need to remove a location, select the **Delete** button on that line.
6. Once finished, select **OK**.
7. To add more specialties, repeat steps 1 - 4.

### 5.3.4 Delete a Specialty/Subspecialty

1. In the **Provider Type/Specialty/Subspecialty** section, select the checkbox beside the specialty/subspecialty you want to delete.
2. Select **Delete**.

### 5.3.5 Modify a License or Certificate

1. On the **Provider Type/Specialty/Subspecialty List** page, in the **License/Certification** section, select the license or certificate link you want to modify.

   The **Modify License/Certification** page opens.
2. Update the fields as needed.
3. When finished, select **Confirm License/Certification**.

   When confirmed, you will see **Yes** populated for the **Valid License/Certification** value.
4. Select **OK**.

### 5.3.6 Add a License or Certificate

A provider can add multiple credentials.

1. On the **Provider Type/Specialty/Subspecialty List page**, in the **License/Certification** section, select **Add**.

   The **Add License/Certification** page opens.

2. Complete the required fields.
3. When finished, select **Confirm License/Certification**.

   When confirmed, you will see **Yes** populated for the **Valid License/Certification** value.

4. Select **OK**.

To add additional licenses, certifications, or other credentials, repeat steps 1 through 4.

You can also select **View Screening Result** to view the screening result on the Provider Credentialing Service (PCS) page.

### 5.3.7 Delete a License or Certificate

1. In the **License/Certification** section, select the checkbox beside the license or certificate you want to delete.
2. Select **Delete**.

To remove an expired license or certificate, set an end date instead of deleting it.

### 5.3.8 Modify a Hospital Admitting Privilege

1. In the **Hospital Admitting Privileges** section, select the **Admitting Privileges Type** link for the record you want to modify.

   The **Hospital Admitting Privileges** page opens.

2. Update the fields as needed.

To update a hospital address, update the **Address Line** and **Zip Code** fields and select **Validate Address**. The system validates the address, populates the **City/Town**, **State/Province**, **County**, and **Country** fields, and displays an address validation message.

3. When finished, select **Save**.

4. Select **Close** to exit.

### 5.3.9 Add a Hospital Admitting Privilege

1. In the **Hospital Admitting Privileges** section, select **Add**.

   The **Hospital Admitting Privileges** page opens.

2. Select **Admitting Privileges** or **Alternate Arrangement** for the question that begins the page.

   If you select **Alternate Arrangement**, the page refreshes to display different fields.

3. If you selected **Admitting Privileges**, do the following. Otherwise, skip to the next step.
    a. Enter the **Hospital Name**.
    b. Enter the **Hospital NPI**.
    c. Enter the **Address Line** and **Zip Code** fields and select **Validate Address**.

       The system validates the address, populates the **City/Town**, **State/Province**, **County**, and **Country** fields, and displays an address validation message.
    d. Enter the hospital's **Phone Number**.
    e. Select the **Admitting Status**.
4. If you selected **Alternate Arrangement**, do the following:
    a. In the **Alternate Arrangement/Who will admit on your behalf** field, provide a brief description of the arrangement or enter the name of the physician who will admit on your behalf.
    b. Enter the **Admitting Physician NPI**.
5. Enter or select the **Start Date** and **End Date**.
6. Select **OK**.

## 5.3.10 Delete a Hospital Admitting Privilege

1. In the **Provider Type/Specialty/Subspecialty** section, select the checkbox beside the hospital admitting privilege you want to delete.
2. Select **Delete**.

### 5.3.11 Add or Remove Supporting Documents

1. In the **Supporting Documents** section, select the **Document Type** and **Document Name**.
2. Select the attachment icon to search for and select the document you want to attach.
3. Enter any **Remarks** as necessary for the document.
4. When finished, select **Close**.

To remove a supporting document, select the checkbox beside the document record and select **Delete**.

## 5.4 Managing Education/Work History/Training

The system allows you to add or modify the education/training/work history details for an active provider. You can perform these tasks on the **Education/Training/Work History** page.

To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.
2. Select the **Education/Training/Work History** link.

   The **Education/Training/Work History** page opens.

### 5.4.1 Add Education

1. On the **Education/Training/Work History/Supporting Documents** page, in the **Education List** section, select **Add**.

   The **Add Education Details** page opens.

2. Provide the required details.
3. When finished, select **OK**.

   Or

   Select **Save and Add Another** to save the current information and add another education record.

### 5.4.2 Add Training

1. On the **Education/Training/Work History/Supporting Documents** page, in the **Training List** section, select **Add**.

   The **Add Training Details** page opens.
2. Provide the required details.
3. When finished, select **OK**.

   Or

   Select **Save and Add Another** to save the current information and add another education record.

### 5.4.3 Add Work History

1. On the **Education/Training/Work History/Supporting Documents** page, in the **Work History** section, select **Add**.

   The **Add Work History** page opens.
2. Provide the required details.
3. When finished, select **OK**.

   Or

   Select **Save and Add Another** to save the current information and add another education record.

### 5.4.4 Modify Education

1. On the **Education/Training/Work History** page, in the **Education List** section, select the relevant **Level of Education** link to modify.

   The **Manage Education Details** page opens.

2. Update the fields as needed.
3. Select **Save** after making the updates.
4. To return to the **Education/Training/Work History List** page, select **Close**.

To view the history of changes made, select **View History**.

### 5.4.5 Modify Training

1. On the **Education/Training/Work History** page, in the **Training List** section, select the relevant **Program Type** link to modify.

   The **Manage Training Details** page opens.

2. Update the fields as needed.
3. Select **Save** after making the updates.
4. To return to the **Manage Education/Training/Work History List** page, select **Close**.

To view the history of changes made, select **View History**.

### 5.4.6 Modify Work History

1. On the **Education/Training/Work History** page, in the **Work History** section, select the relevant **Practice/Employer** link to modify.

   The **Manage Work History** page opens.

2. Update the fields as needed.

3. Select **Save** after making the updates.

4. To return to the **Manage Education/Training/Work History List** page, select **Close**.

> To view the history of changes made, select **View History**.

### 5.4.7 Add or Delete a Supporting Document

To add a supporting document:

1. Select the paperclip icon in the **File Name** column.

   The system displays a window where you can choose the file to upload.

2. Find and select the file to upload and select **Open**.

3. Select the document type and document name from the **Document Type** and **Document Name** drop-down lists.

4. Enter a remark in the **Remarks** field as needed.

5. Select **Save**.

   The document is now shown in the list.

To delete a supporting document, select the appropriate checkbox in the first column for the document you want to delete and select **Delete**.

## 5.5 Managing Payment Details

In the system, you can add or modify the payment information for an active provider.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Payment Details** link.

   The **Payment Details** page opens.

### 5.5.1 Add Payment Details

1. On the **Payment Details** page, select **Add**.

   The **Payment Details** page opens.

   > You cannot add a record if an active record already exists. You can, however, update an existing record. See **Modify Payments Details** below.

2. In the **Mode of Payment** section, select **Electronic Funds Transfer (EFT)** or **Paper Check** for the payment method.

   > If you select **Electronic Funds Transfer (EFT)**, the page refreshes and displays other sections for you to set up EFT payments.

3. If you selected **Paper Check** for the payment method, enter the **Start Date** and **End Date** for the method and continue to the next step. If you selected **Electronic Funds Transfer (EFT)**, enter the necessary information in remaining fields as follows:

    a. In the **Financial Institution Information** section, enter the information for the provider's financial institution where payments will be received.

    b. Enter the provider information in the **Payee Provider Details** section. To complete the address fields, enter the **Address Line 1** and **Zip Code** fields, and then select **Validate Address**.

       The system validates the address and automatically populates the remaining address fields.

    c. In the **EFT Agreement** section, enter the name and date fields, and select the checkbox for the agreement statement to acknowledge your acceptance.

    d. Select **Save** to save your entries before proceeding to the **Supporting Documents** section.

    e. In the **Supporting Documents** section, select from the **Document Type** drop-down list the type of supporting document you will upload.

    f. Select the document name from the **Document Name** drop-down list.

    g. Under the **File Name** column, select the paperclip icon.

    h. At the **Open** window, locate and select the supporting document and select **Open**.

    i. Enter your remarks in the **Remarks** field.

j. Select **Save** in the **Supporting Documents** section.

   The supporting document is uploaded and now appears in the **Supporting Documents** list.

4. When finished on the page, select **OK**.

### 5.5.2 Modify Payment Details

1. On the **Payment Details** page, select the relevant **Payment Method** link.

   The **Payment Details** page opens.

2. Make the necessary changes and select **Save**.
3. To view the history of the changes made, select **View History**.
4. When finished on the page, select **Close**.

## 5.6 Managing Locations/Doing Business As

The system enables authorized users to modify the location information for an active provider. The location information provides all details about a location including the location type, address, contact information, office hours, available languages, and whether new clients are accepted. The location information also includes all attributes associated to a location by the provider enrollment type. Attributes may include the associated addresses, provider type/specialties/subspecialties, licenses and certifications, adding contacts, payment details, bed information, and supporting enrollment documents.

> The provider must have an "Active" business status before the provider's location information can be updated.

To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Locations/Doing Business As** link.

   The **Locations** page opens.

## 5.6.1 View a Location Summary

1. On the **Locations** page, select the **View Summary** icon under the **Actions** column.

   The **Location Summary** page opens.

   Or

   Select the **Edit** icon under the **Actions** column.

   The **Location Details** page opens.

2. Select the **View Summary** link.

   The **Location Summary** page opens

## 5.6.2 Add a Location

1. On the **Locations** page, select **Add**.

   The **Add Provider Location** page opens. This page contains expandable sections of information applicable to the provider enrollment type. To expand a collapsed section, select the down arrow at the right-hand edge of the heading banner.

2. Select the type of location from the **Location Type** drop-down list.
3. Enter the **Doing Business As** information.
4. In the **Location Address** section, enter the street or mailing address in the **Address Line 1** field, enter the Zip Code in the **Zip Code** field, and select

**Validate Address**.

The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

5. Complete the information in the following sections, as applicable to the provider enrollment type:

   - **Communication Details**
   - **Office Information**
   - **Additional Information**

6. Select **OK**.

## 5.6.3 View Enrollment Instructions

1. On the **Locations** List page, select **Enrollment Instructions**.

   The **Required Credentials Matrix List** page opens.

2. View the required information in the sections such as **Document Name**, **License and Certification**, and so on.

## 5.6.4 Manage Location Details

1. On the **Locations** list page, select the relevant **Location** link.

   The **Location Details** page opens. This page contains expandable sections of information as applicable to the provider enrollment type.

   | |
   |---|
   | Not all expandable sections discussed below may appear on your page. |

To expand a collapsed section, select the down arrow at the right-hand edge of the heading banner.

2. Update the editable fields in the sections as needed. The following sections have fields that can be modified:
    - **Location Details**
    - **Contact Information**
    - **Office Information**
    - **Servicing Area**
3. Select **Save** when you are finished updating the information on the **Location Details** page.
4. For the sections listed below, you can view the details of a list item by selecting the link under the applicable column. Each of these links, except for the **File Name** link of the **Supporting Documents** section, opens the "Manage" page for that section. Select **Close** to exit the page back to the **Location Details** page.
    - In the **Addresses** section, select the **Address Type** link.
    - In the **Contacts** section, select the **Contact Type** link.
    - In the **Provider Type/Specialty/Subspecialty** section, select the **Provider Type - Specialty - Subspecialty - Taxonomy** link.
    - In the **Provider Type/Specialty/Subspecialty** section, select the **Provider Type - Specialty - Subspecialty - Taxonomy** link.
    - In the **License/Certification** section, select the **License/Certification** link.
    - In the **Payment Details** section, select the **Payment Method** link.
    - In the **Contacts** section, select the **Contact Type** link.

- In the **Bed Information** section, select the **Bed Type** link.
- In the **Supporting Documents** section, select the **File Name** link. The selected file downloads to your local drive.
- In the **Associate MCO Plan** section, select the **Plan ID** link.
- In the **EDI Exchange Methods** section, select the **EDI Exchange Methods** link.
- In the **Associate Billing Agent** section, select the **Billing Agent ID** link.
- In the **Insurance List** section, select the **Policy Number** link.
- In the **Fee Payment** section, select the **Payment ID** link.

5. To return to the **Locations List** page, select **Close**.

## 5.6.5 Add an Address to a Location

1. On the **Locations** List page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Add Address**.

   The **Manage Address** page opens.

3. Enter the street or mailing address in the **Address Line 1** box, enter the Zip Code in the **Zip Code** field, and select **Validate Address**.

   The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

4. Select **OK**.

### 5.6.6 Associate a Provider Type/Specialty/Subspecialty to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Associate Provider Type/Specialty/Subspecialty**.

   The **Associate Provider Type/Specialty/Subspecialty** page opens.

3. Select an item or items from the **Available Provider Type-Specialty-Sub-specialty-Taxonomy** selection list and select the double right arrow. The values move to the **Associated Provider Type-Specialty-Subspecialty-Taxonomy** selection list.

> You cannot enter the same PT/SP/SSP for two locations with the same address.

4. Select **OK**.

### 5.6.7 Add a License/Certification to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Add License/Certification**.

   The **Manage License/Certification** page opens.

3. Complete the required information and select **Confirm License/Certification**.
4. Select **OK** when the information has been confirmed.

### 5.6.8 Associate Payment Details to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Associate Payment Details**.

   The **Manage Payment Association** page opens.

3. Enter the required information.

4. Select **OK**.

### 5.6.9 Add Contacts to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Add Contacts**.

   The **Manage Contacts** page opens.

3. Enter the required information.

4. Select **OK**.

### 5.6.10 Add Bed Information to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Add Bed Information**.

   The **Manage Bed Information** page opens.

3. Enter the required information.

4. Select **OK**.

## 5.6.11 Approve or Reject a Location

Only authorized State users can approve or reject an associated Billing Agent.

1. On the **Locations** page, use the **Filter By** criteria to find the record that you want to approve or reject.

   Only those records with status "In Review" can be approved or rejected.

2. Select **Approve** or **Reject**.

   The **Update Status** page opens.

3. Enter information in the required fields.
4. Select **OK**.

   The **Locations** page opens with the updated record saved in status "Approved" or "Rejected."

Modification of an approved record changes the status of the record from "Approved" to "In Review."

## 5.6.12 Approve, Reject, or Inactivate Location Information

On the **Location Details** page, authorized State users can approve or reject addresses with a status of "In Review" that are listed in the **Addresses** section. Authorized State users can also approve, reject, or inactivate items with a status of

"In Review" that are listed in the **Contacts**, **Payment Details**, **License/Certification**, **Bed Information**, **Associate MCO Plan**, **Insurance List**, **EDI Exchange Methods**, **Associate Billing Agent**, **Fee Payment**, and **Provider Type/Specialty/Subspecialty** sections.

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. Expand the list section containing the item you want to approve, reject, or inactivate by selecting the down arrow at the right-hand edge of the heading banner.

3. Select the item's checkbox in the first column.

4. Select the **Approve**, **Reject**, or **Inactivate** button displayed in that section.

   The status column changes to "Approved," "Rejected," or "In-Active."

## 5.6.13 Add or Delete Comments

1. On the **Locations** page, select **Comments**.

   The **Comments** page opens.

2. To delete a comment, select the checkbox next to the relevant record and select **Delete**.

3. To add a comment, select **Add**.

   The **Add Comments** page opens.

4. Select the **Comment Type** and enter the **Comments**.

5. Select **Save** after making the updates.

## 5.6.14 Associate an MCO Plan

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Associate MCO Plan**.

   The **Associate MCO Plan** page opens.

3. Select **Confirm/Search Plan** to search for an MCO Plan or confirm the Plan ID entered.

4. In the **Supporting Documents** section, you can:

   - Upload a new supporting document by selecting from the drop-down lists in the first two columns, selecting the paperclip icon under the **File Name** column to select a document on your local or network drive to upload, and selecting the **Save** button in this section to upload the file.
   - Select the checkbox for an existing supporting document you want to delete and select **Delete**.
   - Select the relevant **File Name** link to download the supporting document.

5. Select **Save** after making the updates.

## 5.6.15 Add an EDI Exchange Method to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **EDI Exchange Methods**.

   The **EDI Exchange Methods** page opens.

You can only add one active EDI exchange method.

3. Enter the required information.
4. Select **OK**.

### 5.6.16 Add a Fee Payment to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Add Fee Payment**.

   The **Fee Payment** page opens.

3. Enter the required information.
4. Select **OK**.

### 5.6.17 Associate a Billing Agent to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Associate Billing Agent**.

   The **Manage Billing Agent Association** page opens.

3. Enter the Billing Agent ID and select **Confirm/Search Billing Agent**.
4. Enter the required information.
5. Select **OK**.

### 5.6.18 Add Insurance to a Location

1. On the **Locations** page, in the **Location** column, select the location to modify.

   The **Location Details** page opens.

2. From the left menu, select **Add Insurance**.

   The **Add Insurance** page opens.

3. Enter the required information.

4. Select **OK**.

## 5.7 Managing Billing Providers/Other Associations

The system enables authorized users to add and modify Billing Provider and other associations for an active provider. You can perform these tasks on the **Billing Provider/Other Associations** page. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the relevant **Associate Billing Provider/Other Associations** link.

   The **Billing Provider/Other Associations** page opens.

### 5.7.1 Manage Billing Provider Associations

1. On the **Billing Provider/Other Associations** page, select the relevant **Provider ID** link.

   The **Manage Billing Provider/Other Associations** page opens.

2. Modify the details as needed.

3. To save the changes, select **Save**.

4. Select **Close** to return to the **Billing Provider/Other Associations** page.
5. To return to the **Billing Provider/Other Associations** page, select **Close**.

### 5.7.2 Associate a New Billing Provider

1. On the **Billing Provider/Other Associations** page, select **Add**.

   The **Associate Billing Provider/Other Associations** page opens.
2. Select **Billing to Billing**, **Billing to Servicing**, or **Servicing to Billing** from the **Association Type** drop-down list.
3. Select the location from the **Location** drop-down list.
4. Select **Application ID**, **NPI**, or **Provider ID** from the **Search By** drop-down list.
5. Enter the Billing or Servicing Provider's NPI or Provider ID in the **ID** field and press the **Tab** key.

   The page refreshes and displays the provider's name, automatically populates the **Start Date** fields, and, if applicable, the **Available Specialty** selection list.
6. If needed, update the **Start Date** field and enter or select the end date in the **End Date** field.
7. If you are associating a Servicing Provider, complete the remaining fields:
   a. If applicable, select the **Accept New Clients** checkbox.
   b. Select the **Allow Update** checkbox if you want to allow the Servicing Provider to modify the details on this page.
   c. Select and move the specialty from the **Available Specialty** selection list to the **Associated Specialty** selection list.

   d. For the **Available Hours** fields, select the checkbox for each day the office is open and then select the opening and closing hours, respectively, from the two drop-down lists.

8. If you are associating multiple providers, select **Save and Add Another** to save the current information you entered, clear the fields, and then proceed to associate another provider.

9. When finished, select **OK** to exit the page.

## 5.8 Managing Associated MCO Plans

In the system, you can update the Managed Care Organization (MCO) plans for an active provider. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Associate MCO Plan** link.

   The **MCO Plan List** page opens.

### 5.8.1 Manage or Remove the Associated MCO Plan

1. On the **MCO Plan List** page, select the relevant **Plan ID** link.

   The **Manage MCO Plan Association** page opens.

2. Make the necessary changes and select **Save**.

   To extend the association with the plan, change the end date to the new date.

   To remove or stop association with the plan, change the end date to the current date.

3. To return to the **MCO Plan List** page, select **Close**.

### 5.8.2 Associate an MCO Plan

1. On the **MCO Plan List** page, select **Add**.

   The **Associate MCO Plan** page opens.

2. Select **Confirm/Search Plan**.

   The **MCO Plan Search List** page opens.

3. Select the checkbox beside the relevant **Plan ID** record.

4. Choose **Select**.

   An updated **Associate MCO Plan** page opens, displaying the details of the selected MCO Plan.

5. In the **Supporting Documents** section, select the **Document Type** and **Document Name**.

6. Select the attachment icon to search for and select the document you want to attach.

7. Enter any **Remarks** as necessary for the document.

8. Select **Save**.

9. Select **OK**.

   To associate more MCO Plans, repeat these steps.

# 5.9 Managing Ownership Details

In the system, authorized users can add ownership details or other owned entities. You can also modify the ownership details that were provided during the enrollment process. You can perform these tasks on the **Owners List** page.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

## 5.9.1 Add Owner

1. On the **Owners List** page, from the **Actions** drop-down list, select **Add Owner**.

   The **Provider Controlling Interest/Ownership** page opens.

2. Select the owner type from the **Type** drop-down list.

   One of the owners must be classified as a Managing Employee.

3. Provide the appropriate details in all the required fields.

4. To add the address, enter the street or mailing address in the **Address Line 1** box, enter the Zip Code in the **Zip Code** field, and select **Validate Address**.

   The system automatically populates the **City/Town**, **State/Province**, **County**, and **Country** fields.

5. Select **OK**.

   You return to the **Owners List** page where the added owner is now listed.

To add additional owners, repeat steps 1 through 4.

### 5.9.2 Import Owner

1. On the **Owners List** page, from the **Actions** drop-down list, select **Import Owner**.

   The **Import Owner from Other Enrollment** page opens.

2. Select the **NPI** or **Provider ID** option.

3. To search for the provider, enter the provider's NPI or Provider ID, Zip Code, and SSN/EIN/FEIN in the appropriate fields, and select the owner type from the drop-down list.

4. Select **Search**.

   The page refreshes and displays the search results in the **Owners Available to Import** section.

5. Do one of the following:

   - Select the checkbox for an owner you want to import and select **OK**.
   - Select **Import All** to import all owners shown in the list.

   You return to the **Owners List** page where the imported user(s) are now listed.

### 5.9.3 Identify Owners Relationships

1. On the **Owners List** page, from the **Actions** drop-down list, select **Owners Relationships**.

The **Add Relationship** page opens. The owners are listed in expandable sections where you select each owner and then indicate the relationship of the owner to each other owner and vice versa.

2. Select the **Yes** or **No** option for **Do any of the Owners have the following relationship (Daughter, Daughter-In Law, Father, Father-In Law, Mother, Mother-In Law, Sibling, Son, Son-In Law, Self, Spouse)?** question.
3. Select **Save**.

   If you selected **No**, the page defaults all of the **Relation to *<Selected Owner>*** and **Relation to Assoc. Owner** fields on the page to **None**. Skip to step 6.
4. If you selected **Yes**, for each owner do the following:
   a. From the **Relation to *<Selected Owner>*** drop-down list, select the relation of the associated owner to the currently selected owner.
   b. From the **Relation to Assoc. Owner** drop-down list, select the relation of the currently selected owner to the associated owner.
5. Select **Save**.
6. Select **Close**.

### 5.9.4 Complete the Owners Adverse Action Information

1. On the **Owners List** page, from the **Actions** menu, select **Owners Adverse Action**.

   The **Owners with Adverse Action** page opens.
2. For each owner, select the **Yes** or **No** option to the legal statement and add comments as needed.
3. When finished, select **OK**.

### 5.9.5 Manage Ownership Details of the Enrolled Business Provider

1. On the **Owners List** page, select the relevant **SSN/EIN/FEIN** link.

   The **Manage Provider Controlling Interest/Ownership** page opens.

2. Make the necessary changes.

3. To view the associated providers, select **Associated Providers**.

   The **Associated Providers** page opens displaying the list of associated providers with the NPI/Provider ID, Provider Name, Start Date, and End Date. Select **Close** to return to the previous page.

4. Make the necessary changes to the owner details and select **Save**. Then, select **Close**.

5. To modify the owner relationship, select **Owners Relationships** from the **Actions** menu.

6. On the **Manage Owner Relationship** page, make the necessary changes and select **Save**. Then, select **Close**.

7. To modify the adverse legal actions or convictions disclosure, select **Owners Adverse Action** from the **Actions** menu.

   > This disclosure must be completed every time any change is made to the ownership details.

8. On the **Final Adverse Legal Actions/Convictions** page, read the disclosure, and then select **Yes** or **No** accordingly.

9. To save the changes, select **OK**.

### 5.9.6 Manage Ownership Details of Other Owned Businesses

1. On the **Owners List** page, under the **List Ownership Interest in other Disclosing Entities by Medicaid and/or Medicare** section, in the **EIN/FEIN** column, select the item to modify.

   The **Manage Provider Controlling Interest/Ownership** page opens.

2. Make the necessary changes and select **Save**.
3. To return to the **Owners List** page, select **Close**.

> If the provider has associated providers, these will be listed in the **Associated Providers** section.

### 5.9.7 Add Other Owned Entities

To add other medical service entities, perform the following steps:

1. On the **Owners List** page, in the **List Ownership in other Disclosing Entities reimbursable by Medicaid and/or Medicare** section, select **Add Other Owned Entity**.

   The **Manage Provider Interest/Ownership in Other Medicaid/Medicare Entities** page opens.

2. Enter the required details.
3. Select **OK**.

> To add more owned entities, repeat these steps.

## 5.10 Managing Supporting Documents

You can use the system to view and upload documents from a provider's enrollment. You can update some details about the documents, like notes and the end date. You can also delete extra documents, but not the required ones. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Add Supporting Documents** link.

   The **Additional Documents** page opens.

### 5.10.1 View an Uploaded Document

1. On the **Additional Documents** page, select the relevant **File Name** link in the **Additional Documents** or **Supporting Documents** section.

   The document downloads to your computer.

2. To view the document, in File Explorer, go to the **Downloads** folder, and then open the document.

### 5.10.2 Upload a New Document

1. On the **Additional Documents** page, under **Additional Documents**, select the **Document Type** and **Document Name**.

2. Select the attachment icon in the **File Name** column.

   Your computer's **Open** dialog appears.

3. Search for and select the document you want to attach from your computer and select **Open**.

The file name appears in the **File Name** column.

4. Enter any applicable notes in the **Remarks** field.
5. Select **Save**.

You can delete an Additional Document by selecting the checkbox beside the record and selecting **Delete**. You cannot delete documents in the **Supporting Documents** section.

## 5.11 Managing the Provider Modification Checklist

The system allows you to manage the provider checklist responses for an active provider. To manage this information, follow the steps below.

Providers:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Complete Modification Checklist** link.

   The **Manage Provider Checklist** page opens.

To manage the Provider Checklist answers:

1. Select **Yes**, **No**, or **Not Completed** from the **Answer** column to answer all the questions by selecting the appropriate option.

   > If you answer **Yes** to any of the questions, it must have an accompanying comment.

2. To save the changes, select **Save**.
3. To close the **Manage Provider Checklist** page, select **Close**.

# 5.12 Submitting the Modification Request for Review

After provider modifications are completed, you submit the request for State review and approval. To do this, follow the steps below:

1. From the **Provider** menu, under **VIEW PROVIDER**, select **Manage Provider Information**.

   The **View/Update Provider Data** page opens for the specific enrollment type.

2. Select the **Submit Modification Request for Review** link.

   The **Submit Modification Request** page opens.

## 5.12.1 Submit the Modification Request for Review

1. In the **Trading Partner Agreement** section, read the Trading Partner agreement, scrolling through the entire document on the page.

   When you have scrolled to the bottom, the fields in the **Electronic Signature** section are enabled.

2. Acknowledge your acceptance of the Trading Partner Agreement by selecting the checkbox for **I hereby certify that I am the Provider authorized to accept these terms on behalf of the above organization[...].**

3. Enter your first and last name in the **First Name** and **Last Name** fields.

4. Select **Next**.

   The page refreshes to display the **Medical Assistance Provider - Terms & Conditions**.

5. Read the terms and conditions and agree to them by selecting the checkbox for **By checking this, I certify that I have read and that I agree and accept the enrollment conditions in the Trading Partner Agreement.**

6. Select **Submit for Modification** to submit your modification request for review.

A message confirming your modification request displays.

Once the application is submitted, providers cannot modify their information until the modification request is approved or rejected by the State.

7. Select **Close** to exit the confirmation message.

# Glossary

This section provides definitions for document-specific terms in the following format: Entries will be listed in alphabetical order, and items beginning with numbers will come first.

| Term | Definition |
|---|---|
| **Applicant Type** | The type of provider that is enrolling in the system. |
| **Billing Agent** | A third-party billing service entity authorized to submit transactions and exchange Electronic Protected Health Information (ePHI) on behalf of Medicaid providers or other authorized parties. Billing Agents do not require a National Provider Identifier (NPI) to operate and they submit bills for all the providers who are associated with them. |
| **Billing Provider** | An individual or entity that submits claims for health care services, equipment, or supplies delivered by a servicing provider. |
| **Certification** | The process of obtaining, verifying, and assessing the qualifications of a practitioner. |
| **Managed Care Organization** | A healthcare delivery system that coordinates healthcare services to beneficiaries or enrollees by using a defined network of physicians and hospitals. |
| **Drop-Down List** | A user interface element from which users can select options from a list in a field. |
| **Electronic Data Interchange** | The structured transmission of data between organizations by electronic means; used to transfer electronic documents or business data from one computer system to another computer system, from one trading partner to another trading partner without human intervention. |
| **Electronic Funds Transfer** | An electronic transfer of money from one |

| Term | Definition |
| --- | --- |
| | bank account to another. |
| **Employer Identification Number** | A unique nine-digit number assigned by the Internal Revenue Service to business entities for the purposes of identification. |
| **Enrollment** | The process through which healthcare providers apply to be included in a health insurance network. |
| **Entity** | A thing with distinct and independent existence, such as an organization or institution. |
| **Facility/Agency/Organization** | An entity that provides healthcare services to people in Medicaid programs. FAO Providers include facilities such as hospitals, home health agencies, nursing facilities, laboratories, group homes, and residential facilities. |
| **Field** | A user interface element that can display view-only data or allow user-entered data. |
| **Filter** | A tool in the system used to sort and display data based on the criteria selected and entered. |
| **Identifier** | Another means by which to identify a provider such as a secondary NPI or a Pharmacy Chain ID. |
| **Inbox** | An electronic folder in which emails or notifications received by an individual are stored. |
| **Indicator** | A flexible data structure that is defined by the State. For providers, indicators are used to further define the services a provider is allowed to perform. Indicators can be used to define specialty and subspecialties and related licensure, certification, and training requirements. Indicators are a key data structure for claims adjudication. |

| Term | Definition |
| --- | --- |
| Individual Fee For Service (Billing) Provider | Individuals who provide healthcare services to people in Medicaid programs. They operate their own practice as a business and bill the state directly for their services. |
| Interface | A device or program for connecting two items of hardware or software so that they can be operated jointly or communicate with each other. |
| License | An agency- or government-granted permission issued to a health care professional to engage in a given medical occupation. |
| Lookup Arrow | A user interface element beside a field that when selected displays a pop-up. From this pop-up, you can select specific values to populate the field. |
| National Provider Identifier | A standard unique health identifier for health care providers, mandated by HIPAA. A HIPAA-covered healthcare provider (whether individual or organization) must obtain an NPI for use to identify themselves in HIPAA standard transactions. |
| New York State Provider Services Module | A web-centric, automated provider enrollment and management solution with a comprehensive provider credentialing service. |
| Ordering/Prescribing/Referring/Attending | An Individual provider type that does not participate with Medicaid for billing purposes, but may order, prescribe to, or refer Medicaid members and may be listed as an OPRA on submitted claims. |
| Page | A screen in the system where you can view, add, enter, and edit information. |
| Permission Matrix | Defines the relationship between a provider type, specialty, and subspecialty. It is also referred to as the Provider Type/Specialty/Subspecialty (PT/SP/SSP) Matrix. |

| Term | Definition |
|---|---|
| **Provider** | An individual, firm, corporation, or other legal entity that provides medical assistance to a beneficiary pursuant to the medical assistance program. |
| **Provider ID** | A unique 10-digit identification number used in the United States for standard health care transactions. |
| **Social Security Number** | A nine-digit number issued to U.S. citizens, permanent residents, and temporary, working residents under section 205 of the Social Security Act. It is used for taxation purposes, to determine benefits, and more. |
| **Specialty** | A specific branch or area of medicine practiced by a provider. |
| **Secure File Transfer Protocol** | A network protocol for securely accessing, transferring, and managing large electronic files and sensitive data. |
| **SSH File Transfer Protocol** | A network protocol providing file access, file transfer, and file management over any reliable data stream. |
| **Subspecialty** | A specific area of expertise within a provider's specialty. |
| **Taxonomy Codes** | Administrative codes set for identifying the provider type and area of specialization for health care providers. |

# Acronyms

This section provides definitions for document-specific acronyms in the following format:

Entries will be listed in alphabetical order, and items beginning with numbers will come first.

| Acronym | Definition |
|---|---|
| **EDI** | Electronic Data Interchange |
| **FAO** | Facility/Agency/Organization |
| **ID** | Identification |
| **NPI** | National Provider Identifier |
| **NYS PSM** | New York State Provider Services Module |
| **OPRA** | Ordering/Prescribing/Referring/Attending |
| **PDF** | Portable Document Format |
| **PE** | Provider Enrollment |
| **PT** | Provider Type |
| **SFTP** | Secure File Transfer Protocol |
| **SP** | Specialty |
| **SSP** | Subspecialty |

# Index