OHCA SECURE PROVIDER PORTAL FUNCTIONS
DISCLAIMER

• SoonerCare policy is subject to change.

• The information included in this presentation is current as of September 2021.

• Stay informed with current information found on the OHCA public website by visiting www.oklahoma.gov/ohca.
WEBINAR DESCRIPTION

The webinar will provide an overview of the OHCA secure provider portal functionality. Topics will include designation of account roles, functions available through the OHCA secure provider portal including accessing provider letters, reports, and searching the fee schedule.

NOTE: Demonstrations and topics related to eligibility, claim or prior authorization submissions will not be covered.

Target Audience – All contracted SoonerCare Providers and staff that access the OHCA secure provider portal.
AGENDA

• Provider Portal Overview
  - Provider Role Access
  - Manage Accounts
  - Clerk Access
  - Billing Agent
  - Enrollment Agent
  - Switch Provider
  - Search Fee Schedule
  - Financial
  - Letters

• Reminders
• Resources
• Questions
PROVIDER PORTAL OVERVIEW
PORTAL OVERVIEW

The SoonerCare Provider Portal is OHCA’s secure website that offers several services:

- Claim status and submission
- Eligibility verification
- Fee schedule search
- Find a provider
- Provider letters
- Prior authorization status and submission
- Remittance advice and other reports
• Upon contract approval from OHCA, a SoonerCare Provider ID number is designated to the specific provider and an OHCA-generated personal identification number (PIN). This is referred to as the Welcome Letter.

• Each new provider portal account requires registration by creating a permanent username, password and challenge questions & answers.

• Once the provider has established a provider portal account, the account administrator can create new clerks and grant each clerk-role specific access.
• **Provider** contracted with OHCA as a provider of services.

• **Clerk** designated by the provider or billing agency for the sole purpose of performing clerical functions.

• **Billing Agent** submits claims on behalf of the provider.
<table>
<thead>
<tr>
<th><strong>Provider Role</strong></th>
<th><strong>Clerk Role</strong></th>
<th><strong>Billing Agent</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ SoonerCare Provider ID Number and PIN required for registration</td>
<td>✓ Clerk code required for registration</td>
<td>✓ Trading Partner ID and PIN required for registration</td>
</tr>
<tr>
<td>✓ My Profile</td>
<td>✓ My Profile</td>
<td>✓ My Profile</td>
</tr>
<tr>
<td>✓ Eligibility</td>
<td>✓ Eligibility*</td>
<td>✓ Eligibility*</td>
</tr>
<tr>
<td>✓ Claims</td>
<td>✓ Claims*</td>
<td>✓ Claims*</td>
</tr>
<tr>
<td>✓ Prior Authorizations</td>
<td>✓ Prior Authorizations*</td>
<td>✓ Prior Authorizations*</td>
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<tr>
<td>✓ Referrals</td>
<td>✓ Referrals*</td>
<td>✓ Referrals*</td>
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<td>✓ Files Exchange</td>
<td>✓ Files Exchange*</td>
<td>✓ Files Exchange*</td>
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<td>✓ Financial</td>
<td>✓ Financial*</td>
<td>✓ Financial*</td>
</tr>
<tr>
<td>✓ Letters</td>
<td>✓ Letters*</td>
<td>✓ Letters*</td>
</tr>
<tr>
<td>✓ Resources</td>
<td>✓ Resources*</td>
<td>✓ Resources*</td>
</tr>
<tr>
<td>✓ Manage Accounts</td>
<td>✓ Update Provider Files* – must also be setup as Enrollment Agent.</td>
<td></td>
</tr>
</tbody>
</table>

*Portal administrator must grant access to functions that will display under the portal tabs.*
The OHCA secure provider portal can be accessed by visiting the OHCA public website at www.oklahoma.gov/ohca - Select the **Provider Portal** link under the Providers section.
MANAGE ACCOUNTS

- **My Home** is the main page of the provider portal that displays the provider information, shortcut links to areas of the website, and other helpful resources.

- Select **Manage Accounts**.
MANAGE ACCOUNTS

The administrator of the provider role has the following options:

- Add new clerk
- Update or remove existing clerks
- Add registered clerk
- Add registered billing agent
- Designate billing agent
- Add enrollment agent
MANAGE ACCOUNTS

• Portal administrators can view status of only active delegates or active and inactive delegates.

• The Clerks area will display the name, birth date, last 4 of the driver’s license number, clerk code and status of each authorized clerk.
ADD NEW CLERK

• Select **Add New Clerk**.
• Enter the required information:
  - First name
  - Last name
  - Birth date
  - Last 4 digits of driver’s license number (or 0000)
• Check all Functions the clerk will need to access.
• Select **Submit**.
ADD NEW CLERK

Verify the clerk information and functions have been appropriately entered.

• If an error was made, select the Edit button to make appropriate changes.

• If all information is correct, select Confirm.

• Select Cancel to cancel the addition.
ADD NEW CLERK

• A clerk assignment message containing a clerk code will display upon confirmation. New clerks will need the clerk code in order to complete portal registration.

• Newly added clerks will display with Active-Pending status until the clerk has completed portal registration.
EDIT CLERK ROLES

Select the name of the clerk to modify the role functions.

<table>
<thead>
<tr>
<th></th>
<th>Name</th>
<th>Display Name</th>
<th>Birth Date</th>
<th>Lost 4 of DLN</th>
<th>Clerk Code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>clerk, bob</td>
<td>Bob</td>
<td>01/01/1980</td>
<td>1234</td>
<td>20412</td>
<td>Active</td>
</tr>
<tr>
<td>2</td>
<td>clerk, sassy</td>
<td>sassy clerk</td>
<td>01/01/1985</td>
<td>1234</td>
<td>20415</td>
<td>Active - Pending</td>
</tr>
<tr>
<td>3</td>
<td>clerk, tina</td>
<td>Tina</td>
<td>01/01/1972</td>
<td>1234</td>
<td>20414</td>
<td>Active</td>
</tr>
</tbody>
</table>
EDIT CLERK ROLES

- Functions can be added or removed at any time.
- At least one function must be selected if the status is Active.
- Selecting Inactive as the status will remove the clerk access to the portal account.
- Select **Submit** and **Confirm** the approved changes.
ADD REGISTERED CLERK

- Clerks with an existing account can be added to multiple provider accounts.
- Select Add Registered Clerk.
- Enter the Last Name & Clerk Code.
- Check the Functions the clerk will need to access.
- Select Submit.
CLERK ACCESS
CLERK ACCESS

• The provider or billing agent is responsible for creating the clerk role access and providing the clerk code.

• Users must register the clerk role account by creating a username, password, challenge questions and answers, and contact information.

• Clerks do not have the ability to create, grant access to, or revoke permissions of other users.
REGISTER ACCOUNT

- Clerks added to a provider portal account must first register before logging in.
- Select Register Now.
• Personal Information:
  - First & Last Name*
  - Birth Date*
  - Last 4 of DLN*
  - Clerk Code*
  *Required fields must match the information created by the portal administrator.

• Select Continue.
CLERK ROLE REGISTRATION STEP 2 OF 2

• Security Information:
  - User ID
  - Password
  - Display Name
  - Phone Number & Ext.
  - E-mail
  - Site key and Passphrase
  - Challenge Questions
CLERK ROLE ACCESS

• Clerk access can be identified by the blue bar that appears across the top of the page.

• Certain functions authorized by the portal administrator will only appear on the clerk page.
BILLING AGENT
BILLING AGENT ACCESS

• Providers may grant access to billing agents for claim submission, receive capitation summaries, remittance advice, and roster transaction reports.

• Logon credentials are provided to billing agents directly by Gainwell.

• Billing agents do not have the ability to create, grant access to, or revoke permissions of other users.
ADD REGISTERED BILLING AGENT

• Select Add Registered Billing Agent.
• Enter the Display Name of the billing agent and existing Agent Code.
• Check the Functions the billing agent will need to access.
• Select Submit.
DESIGNATE BILLING AGENT

• The **Designate Billing Agent** is only used for registered accounts.
• Select the **Transaction Type** dropdown.
• Select the **Billing Agent**.
• Click **Designate to Receive**.
ENROLLMENT AGENT
ENROLLMENT AGENT

• Providers can assign one active clerk to be the enrollment agent.

• The enrollment agent will have access to renew or make changes to the provider’s contract with OHCA:
  - License information
  - Banking details
  - Ownership information

• To authorize access, the enrollment agent must first be set up as a clerk.
ADD ENROLLMENT AGENT

• Click the Add Enrollment Agent tab
• Select the specific Enrollment Agent from the dropdown list.
• Click the Add Enrollment Agent button.
SWITCH

PROVIDER
SWITCH PROVIDER

• The Switch Provider page is only available for roles as clerks and billing agents.

• The provider must add the access to the user account by using the Add Registered Clerk or Add Registered Billing Agent through Manage Accounts.

• Users with the switch provider function can toggle between provider accounts without logging out.
SWITCH PROVIDER PAGE

- Upon logging in to the account, clerks will be redirected to the **Switch Provider** screen.
- Select the provider account to login as and select **Submit**.
• A confirmation message will appear advising the user successfully switched provider login.
• Select OK.
SEARCH FEE SCHEDULE
• The Search Fee Schedule link allows users to inquire procedure code pricing, NDC, and DRG through the OHCA Secure Provider Portal.

• Select the Resource tab to Search Fee Schedule details.

• Check the Terms of Agreement.

• Select Submit to proceed.
SEARCH FEE SCHEDULE

• Enter the required fields to obtain procedure code pricing:
  - Benefit Package
  - Procedure Code
  - Date of Service
  - Age
  - Modifiers, if applicable

• Select Search.
• Pricing and Limitations will include certain information:
  - Reimbursement
  - PA Required
  - Maximum Units
  - Age Restrictions

Search Results

Pricing and Limitations:
- Allowed Amount: $202.32
- PA Required
- Maximum Units: 1
- Age Restriction: 0 - 20
- Medical Review is Not Required
- Gender: Both
- Attachment is Not Required
- Not a Lifetime Procedure
- Not restricted to any Diagnosis
- Billing Provider not restricted to any Specialty
- Rendering Provider not restricted to any Specialty
- Ambulatory Surgical Facility Fee: $0.00
- Ambulatory Payment Classification Fee: $0.00
- Discounted: NA
FINANCIAL
FINANCIAL REPORTS

• Reports are available to access within the Financial tab:
  - Remittance Advice
  - Rosters*
  - Capitation Payments*
  - Payment Reports

*Only applicable to SoonerCare Choice providers.
REMITTANCE ADVICE REPORTS

• **RA Reports** can be searched within the last 24 months.

• **Available From Date** and **To Date** span search cannot exceed 90 days.

• Select **Search**.

• Click the Report Copy icon to view the RA.
Remittance Advice Reports will include:
- Banner Messages
- Claims Status
- EOB Descriptions
- Payment Summary
LETTERS
The OHCA Secure Provider Portal provides helpful letters that are specific to certain provider types:
- C-Section Rate Letters
- ER Utilization*
- PCP Notification Inpatient Admission/Discharge*
- Provider PIN Letter
- Provider Renewal
- Provider Welcome Letter
- SoonerExcel*
- SoonerCare Coordination of Care

*Only applicable to SoonerCare Choice providers
Select the **Letters** tab to access the **Provider Letters**.

Choose the **Letter Type** from the dropdown list.

Enter the **Available From & To Date** fields.

Select **Search**.

Click the Letter icon to view the letter.
WELCOME LETTER

• All contracted SoonerCare Providers receive a Welcome Letter containing important contract information:
  - SoonerCare Provider ID Number
  - Zip+4
  - Contract Code (if any)
  - Effective & Expiration Dates
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RESOURCES
HELPFUL TELEPHONE NUMBERS

• OHCA call center
  - 800-522-0114 or 405-522-6205; option 1

• Internet help desk.
  - 800-522-0114 or 405-522-6205; option 2, 1

• EDI help desk.
  - 800-522-0114 or 405-522-6205; option 2, 2
HELPFUL TELEPHONE NUMBERS

• Care Management Department
  - 877-252-6002

• SoonerRide
  - 800-435-1276
  - tripcare.logisticare.com/login

• Eligibility Verification System
  - 405-840-0650 or 800-767-3949
  - Available 20 hours a day, 5 a.m. to 1 a.m.
HELPFUL LINKS

• Agency website
  - www.oklahoma.gov/ohca

• OHCA provider portal
  - www.ohcaprovider.com

• Provider training
  - www.oklahoma.gov/ohca/providers/provider-training

• Medicaid expansion
  - www.oklahoma.gov/ohca/about/medicaid-expansion/expansion
A revised version of the OHCA provider quick reference guide is now available.

Visit the provider training page to download a copy.
TRAINING RESOURCES

• Provider education specialists:
  - Education specialists provide education and training as needed for providers either virtually or telephonically.
  - Requests for assistance should be emailed to: SoonerCareEducation@okhca.org. (Requests should include the provider name and ID, contact information, and a brief description of what assistance is being sought.)
  - For claims or policy assistance, please contact the OHCA provider helpline at 800-522-0114.

• Monthly webinars

• How-to videos
QUESTIONS?
GET IN TOUCH

4345 N. Lincoln Blvd.
Oklahoma City, OK 73105

okhca.org
mysoonericare.org

Agency: 405-522-7300
Helpline: 800-987-7767

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