Medi-Cal Dental Provider Portal User Guide

Version 1.0

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1 Introduction

When a Provider registers for an online portal account on the Department of Health Care Services (DHCS) website, the Provider will have access to the portal on a 24/7 basis and will be able to do the following:

- Access the Provider portal using web browsers such as Safari, Chrome, and Edge as well as mobile devices such as iPhone and Android.
- Send secure message inquiries to the Customer Service Center for assistance.
- Live Chat with a Customer Service Center Representative between the business hours of 8:00 a.m. – 5:00 p.m. Monday – Friday, except for designated state holidays.
- Search and view a member's treatment history.
- Search and view their claims information.
- Search and view their payment history.
- Search and view their treatment authorizations.
- Search for a provider and get driving directions to a Provider's location using Google Maps.
- Add and maintain Delegates who can perform functions on behalf of a Provider.
- Upload and download files.
- Update their profile account information and change their Password.

NOTE: *For technical assistance, questions, or directions, contact the Customer Service Center at 1-800-423-0507 (hours of operation 8:00 a.m. PST – 5:00 p.m. PST Monday – Friday except for designated state holidays).*

1.1 Purpose

This is a user guide for the Medi-Cal Dental Provider Portal. The Provider Portal can be used for accessing the Member's information such as Treatment History, Payment History, Claims, and Authorizations. It can be accessed from the Medi-Cal Dental Website (https://dental.dhcs.ca.gov/Providers/DentalProviders).

Following are the links to be used for registration and login after the registration:

1. Providers can register for a portal account at https://dental.dhcs.ca.gov/Providers/DentalProviders

2. Providers can login to the portal account at https://dental.dhcs.ca.gov/Providers/DentalProviders

2 Provider Portal Account Registration

You can register for an online portal account by clicking the **Provider Portal Registration** link on the Medi-Cal Dental Website home page. You can register by submitting all the required fields on the **Verify User │ Registration** page. When the information is successfully submitted, you will receive an email containing a link to complete the registration process.

2.1 Navigate to the Provider Portal Registration Page

1. From the Medi-Cal Dental Website Home Page, click on the Providers tab, and then click on the **Provider Portal Registration** link (https://dental.dhcs.ca.gov/Providers/DentalProviders).

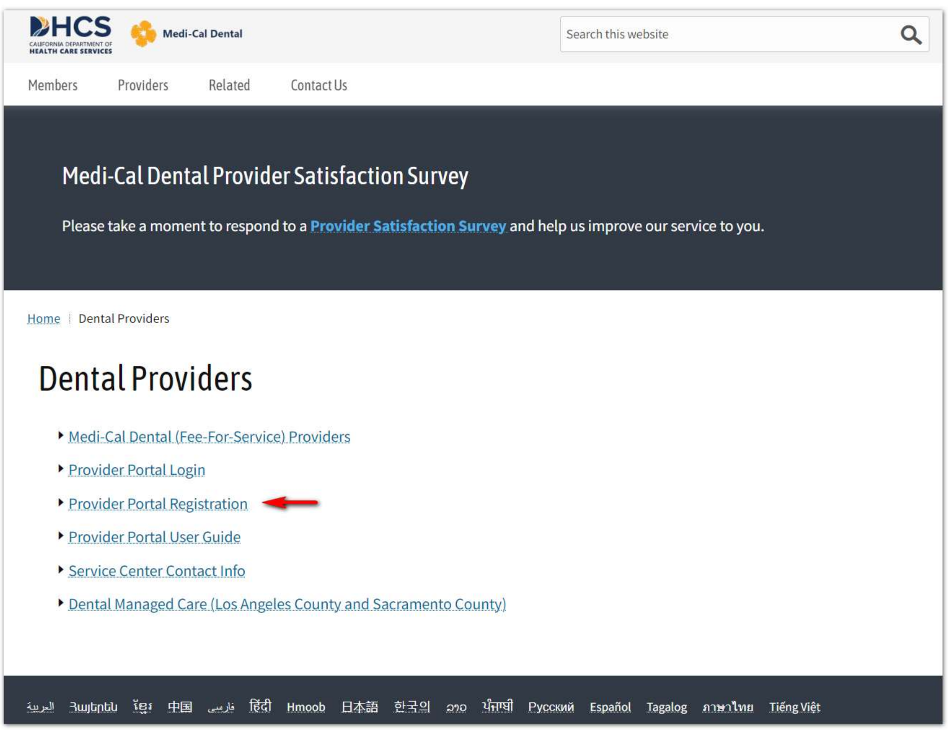


Figure 1. Medi-Cal Dental Website Home Page – Provider Portal Registration Link

2. The **Verify User │ Registration** page will display. All the fields with red asterisks (*) indicate a required field.

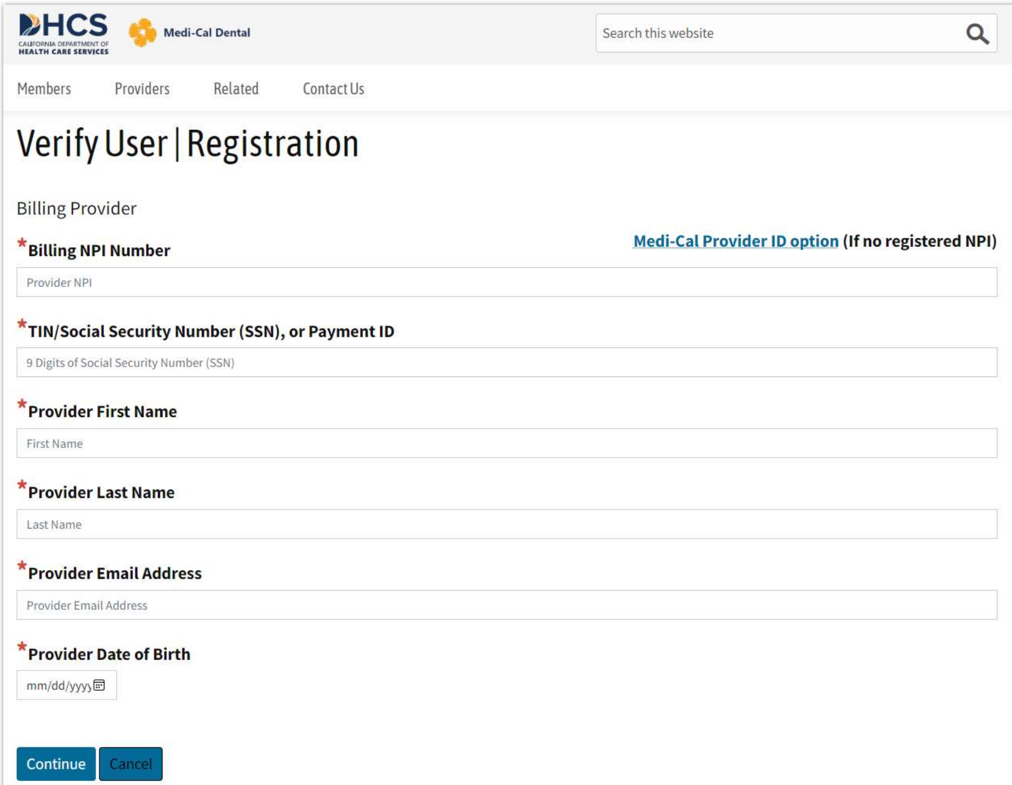


Figure 2. Provider Portal Registration Page

2.2 Verify Provider Information

1. If you have a Billing National Provider Identification (NPI), enter the following information:
   - Billing NPI Number
   - TIN/Social Security Number or Payment ID

     NOTE: *TIN is your Tax Identification Number*
   - Provider First Name
   - Provider Last Name
   - Provider Email Address
   - Provider Date of Birth
2. If you **do not** have a Billing National Provider Identification (NPI), click on “Medi-Cal Provider ID option” and enter the following information:

- Medi-Cal Provider ID
- TIN/Social Security Number or Payment ID

  NOTE: *TIN is your Tax Identification Number*
- Provider First Name
- Provider Last Name
- Provider Email Address
- Provider Date of Birth

3. Click the **Cancel** button to clear and re-enter information.
4. Click the **Continue** button after entering the information.
5. After clicking the **Continue** button, the system will display the **Next Steps** page which informs you that the registration initiation process is complete and provides further instructions on how to fully complete the registration process.

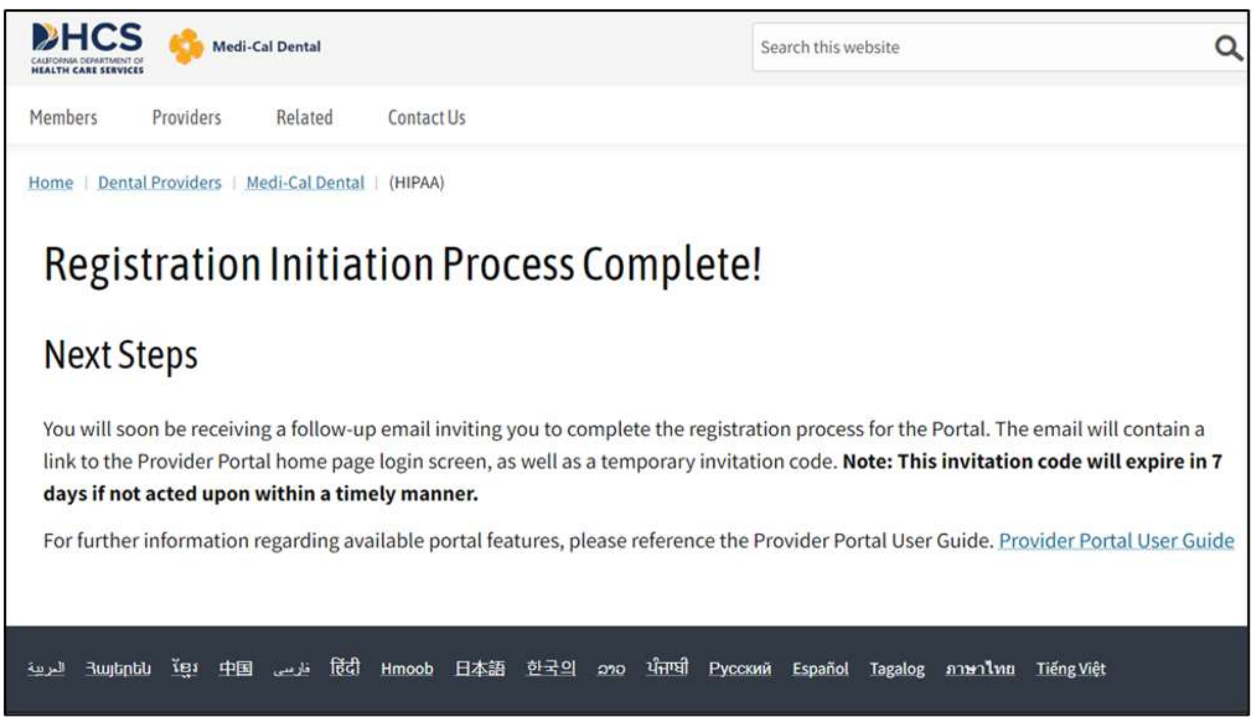
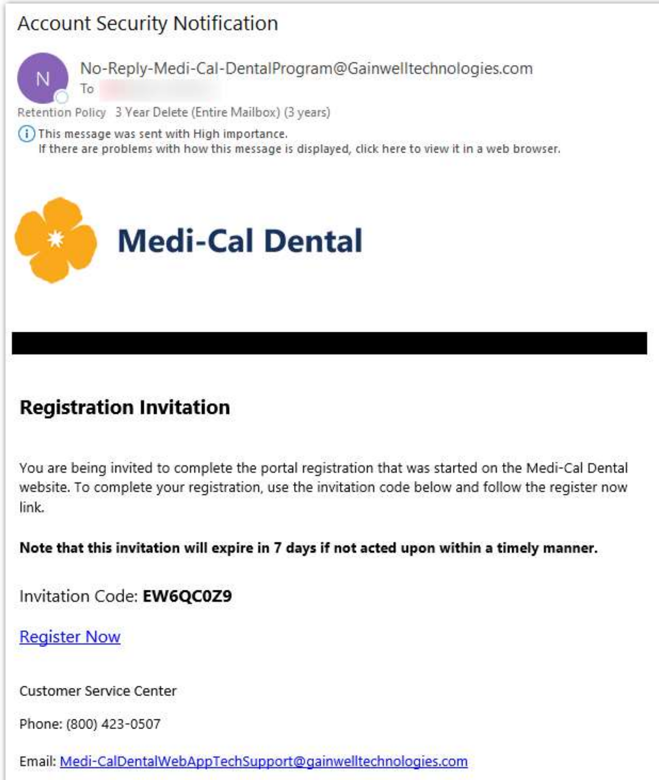


Figure 3. Registration Initiation Process Complete Message

6. You will receive an email at the email address that was provided on the **Verify User │ Registration** page.



Account Security Notification

N No-Reply-Medi-Cal-DentalProgram@Gainwelltechnologies.com
To

Retention Policy 3 Year Delete (Entire Mailbox) (3 years)

This message was sent with High importance.
If there are problems with how this message is displayed, click here to view it in a web browser.

Medi-Cal Dental

Registration Invitation

You are being invited to complete the portal registration that was started on the Medi-Cal Dental website. To complete your registration, use the invitation code below and follow the register now link.

Note that this invitation will expire in 7 days if not acted upon within a timely manner.

Invitation Code: **EW6QC0Z9**

Register Now

Customer Service Center

Phone: (800) 423-0507

Email: Medi-CalDentalWebAppTechSupport@gainwelltechnologies.com

Figure 4. Registration Invitation Email

7. Click the **Register Now** link in the email.

IMPORTANT: *You will have seven days to complete registration before the* **Register Now** *link is no longer active.*

2.3 Identity Verification

1. Click the **Register Now** link in the email and the “Step 1: Accept Invitation” page will display. Enter the **Invitation Code** received in the email.

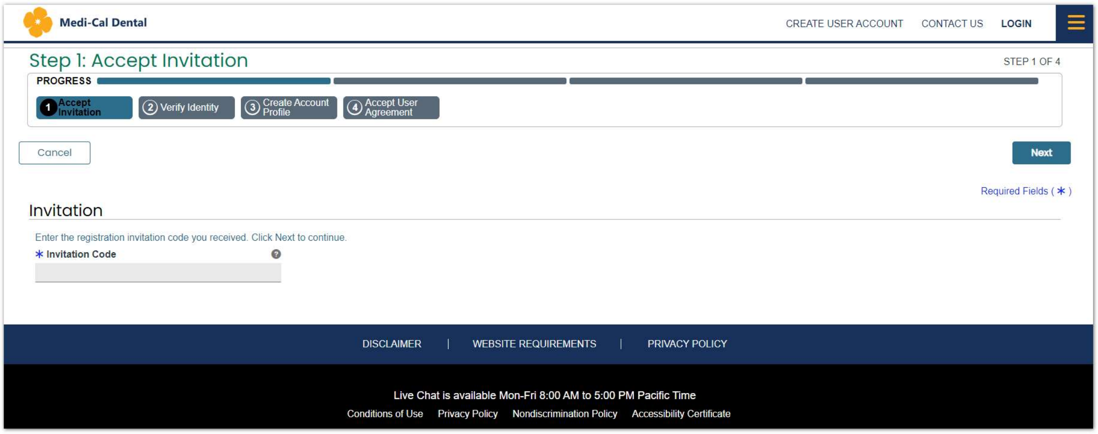


Figure 5. Step 1 Accept Invitation

2. Click **Next** and the “Step 2: Verify Identity” page will display.

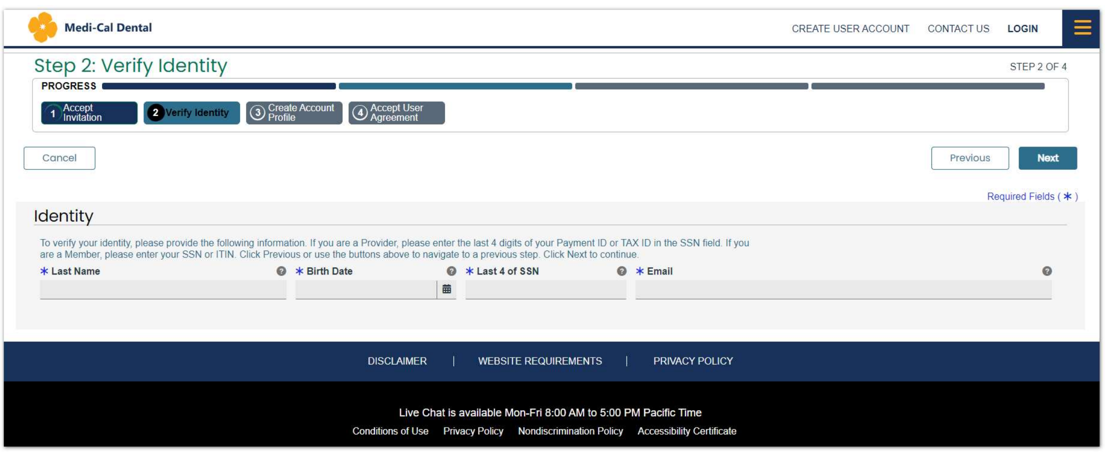


Figure 6. Step 2: Verify Identity

3. You must enter information in the following required fields to verify the user identity.
   - Last Name
   - Birth Date
   - Last 4 of the Payment ID or Tax ID
   - Email Address
4. Click **Next**.

NOTE: *The information entered must match the same information you entered on the* **Verify User │ Registration** *page during initial registration.*

2.4 Create Account Profile

1. The "Step 3: Create Account Profile" page is displayed.

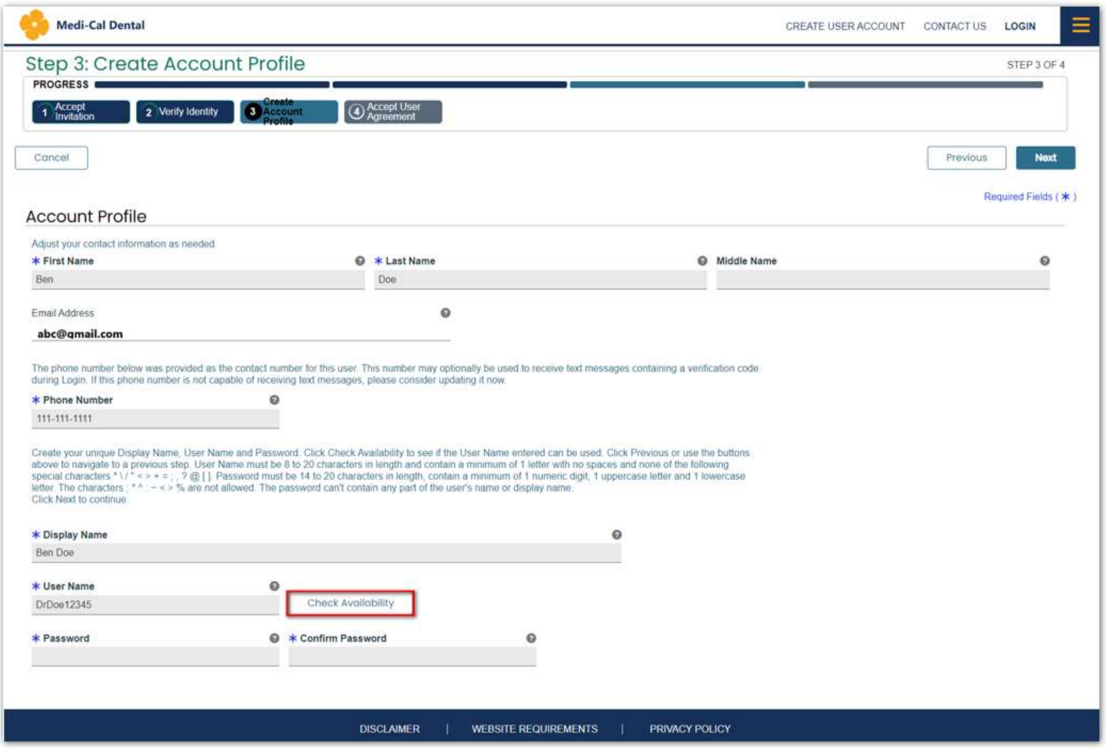


Figure 7. Step 3: Create Account Profile Page

2. Enter information in the required fields creating the following:
    - Account Display Name
    - User Name (you can check the availability of the User Name)
    - Password
3. Click **Next**.

NOTE: *Rules for creating a Password:*

- Cannot contain the user's Account Name or parts of the user's Full Name that exceed two consecutive characters.
- Must be at least 14 to 20 characters in length.
- Must contain 3 of the following 4 categories:

- English uppercase characters (A through Z)
- English lowercase characters (a through z)
- Base 10 digits (0 through 9)
- Special characters (such as ! ? @ # $ & * = +` { } [ ] ( ) / \ “ ; ’, .)

- Cannot be changed more than once in the same day.
- Cannot be the same as the last 10 passwords used.

2.5 Accept User Agreement

1. The “Step 4: Accept User Agreement” displays.

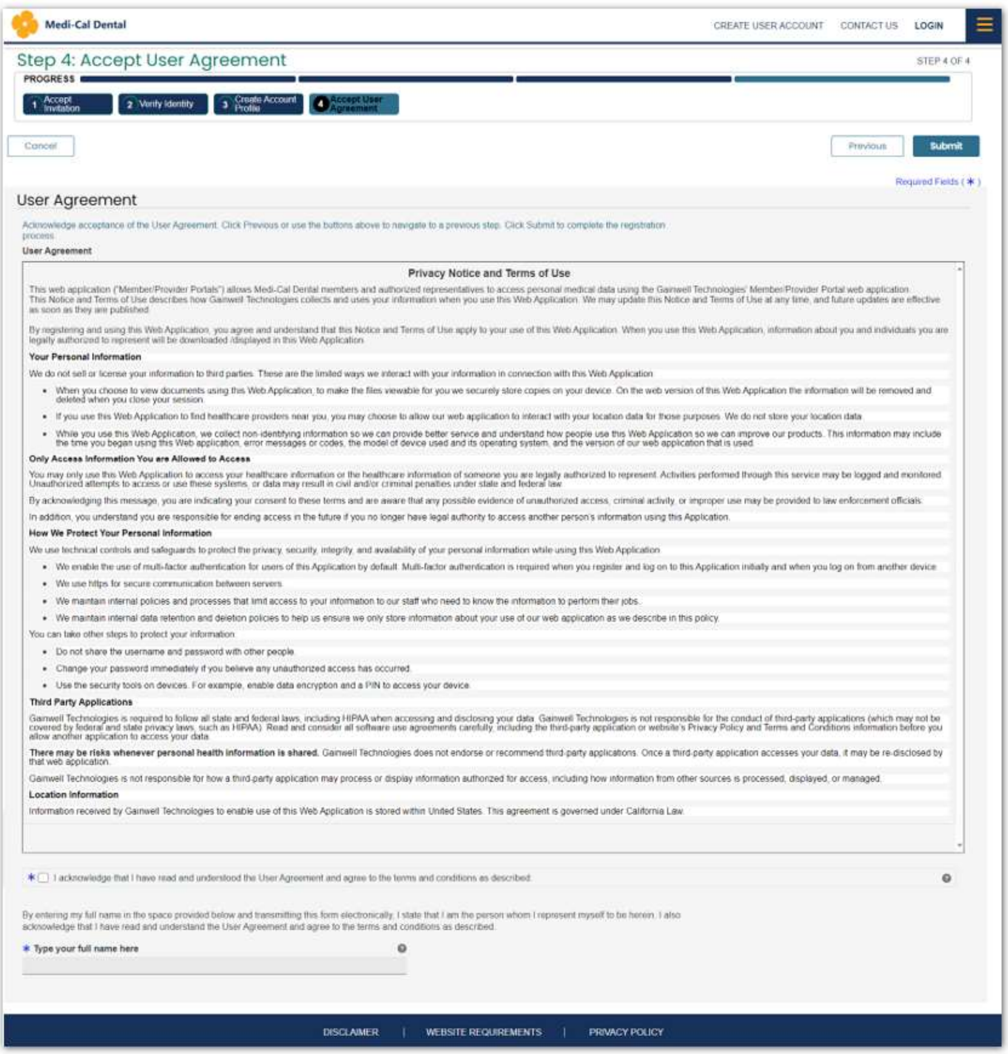


Figure 8. Step 4: Accept User Agreement Page

2. Complete the required fields:

a. Click the check box, acknowledging you have read and understood the User Agreement, and agree to the terms and conditions by checking the check box.

b. Type your full name.

c. Click **Submit**.

3. The following email confirmation will be sent to the email address provided during registration.

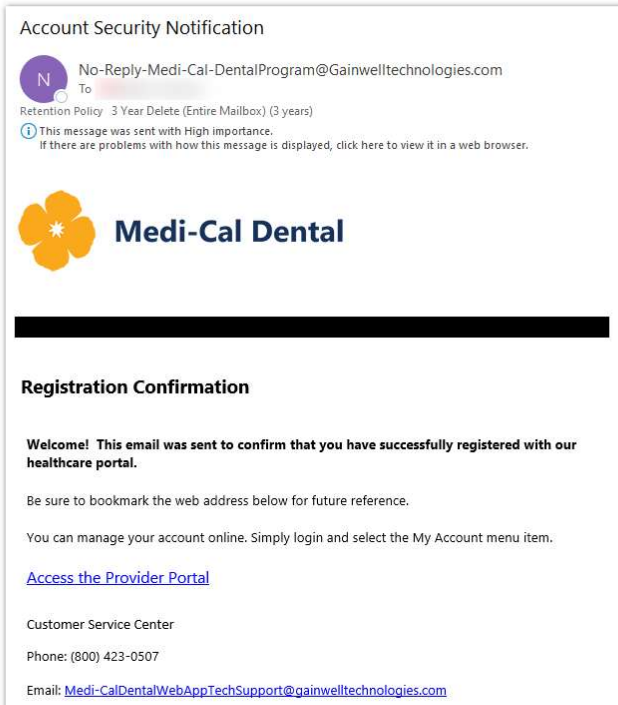


Figure 9. Registration Confirmation Email

4. You can now access the Medi-Cal Dental Provider Portal by clicking the **Access the Provider Portal** link in the email.

2.6 Registration Errors

1. If incorrect information is entered, you cannot be verified and cannot proceed to the next registration step. An error message will display, “The registration information you submitted was not found in the system."

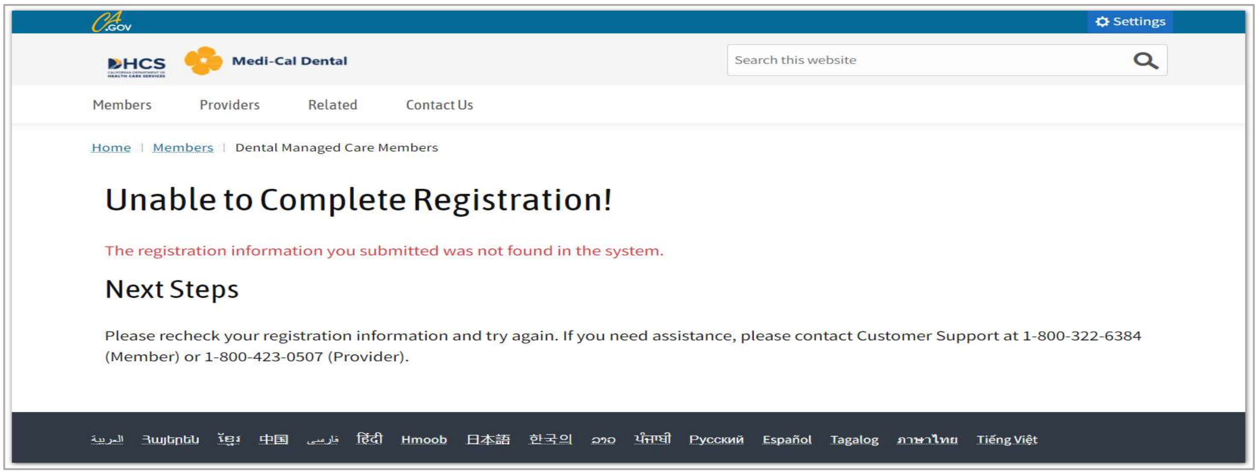


Figure 10. Registration Error Message: The Registration Information you Submitted was not Found

2. If you enter the same combination of First Name, Last Name, and Email Address as that of an already registered provider account and try to register, the “An account has already been created using the combination of First Name, Last Name, and Email that you submitted” error message will display.

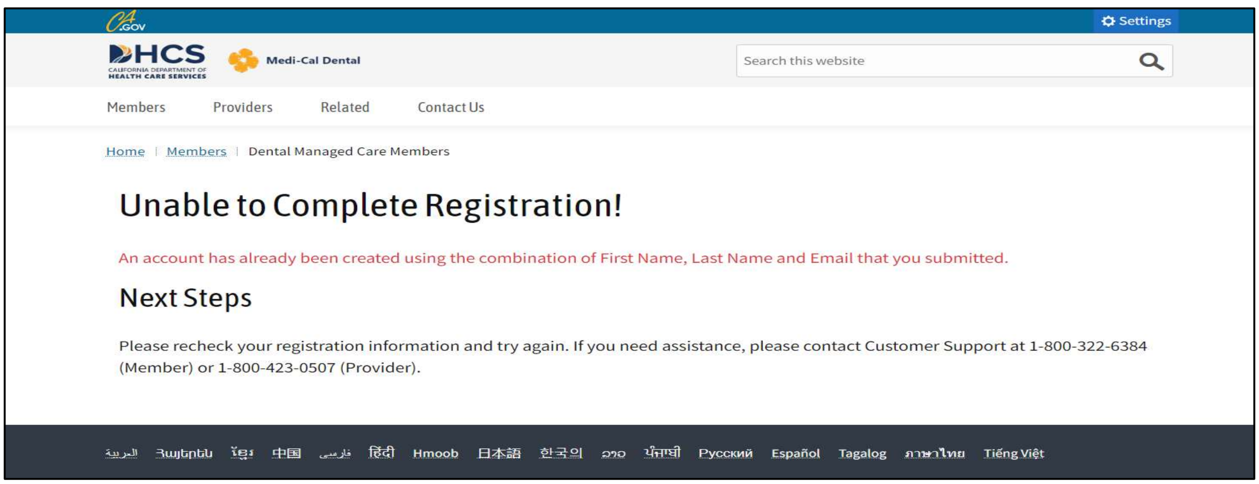


Figure 11. Registration Error Message: An Account has Already Been Created

3 Login to the Provider Portal

You can access the Medi-Cal Dental **Provider Portal Welcome** page by clicking the link on the Medi-Cal Dental Website home page (under the Provider tab).

1. Click the Provider Portal Login link.

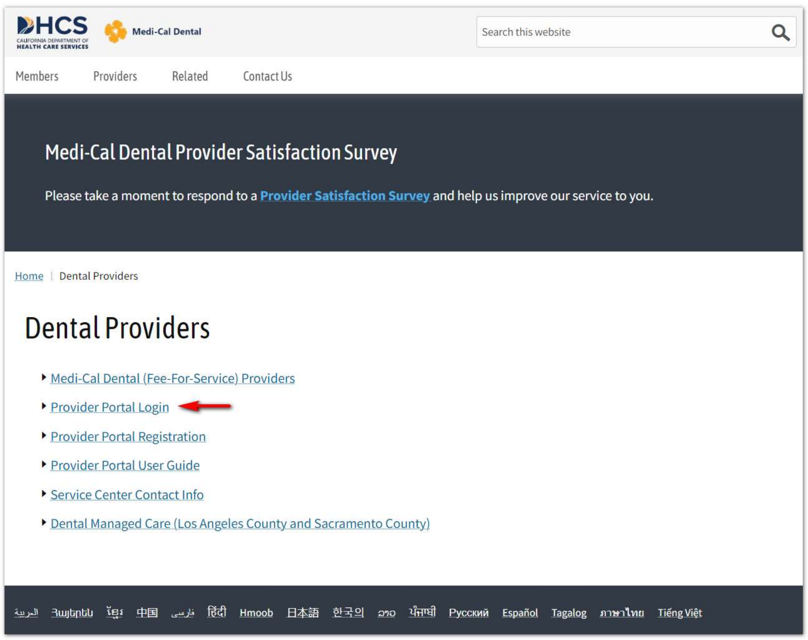


Figure 12. DHCS Medi-Cal Dental Website Home Page

2. When you click the link, the **Provider Portal Welcome** page displays. There are two ways you can login:
   a. You can click on **Login** located in the upper top right corner of this page.
   b. You can click **Login** under the Providers header.

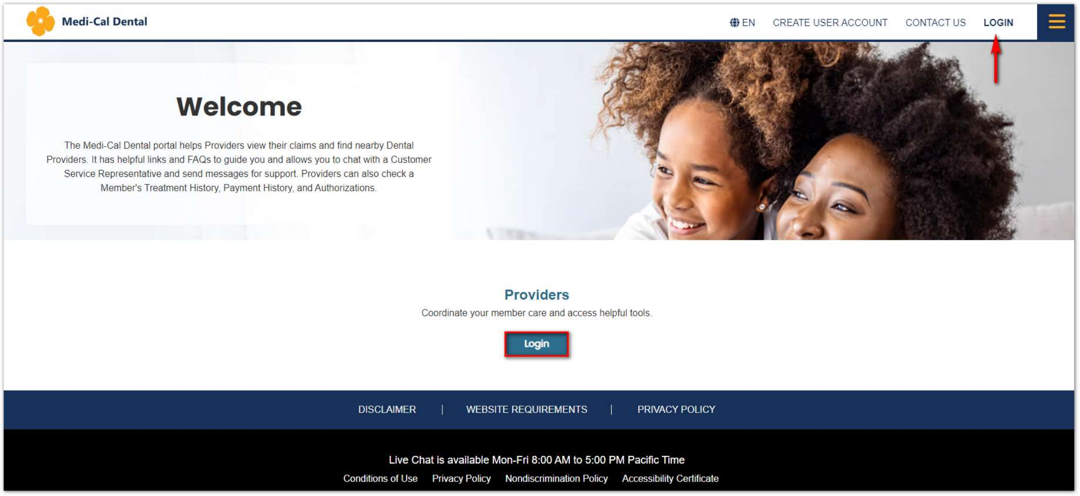


Figure 13. Provider Portal Welcome Page

3. Enter the Provider's User Name and Password. Click **Submit**.

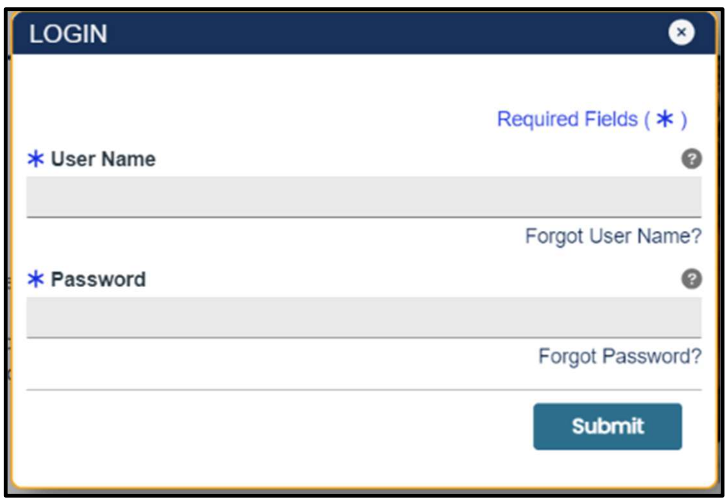


Figure 14. Portal Provider LOGIN Page

4. The Multi-Factor Authentication (MFA) panel displays.

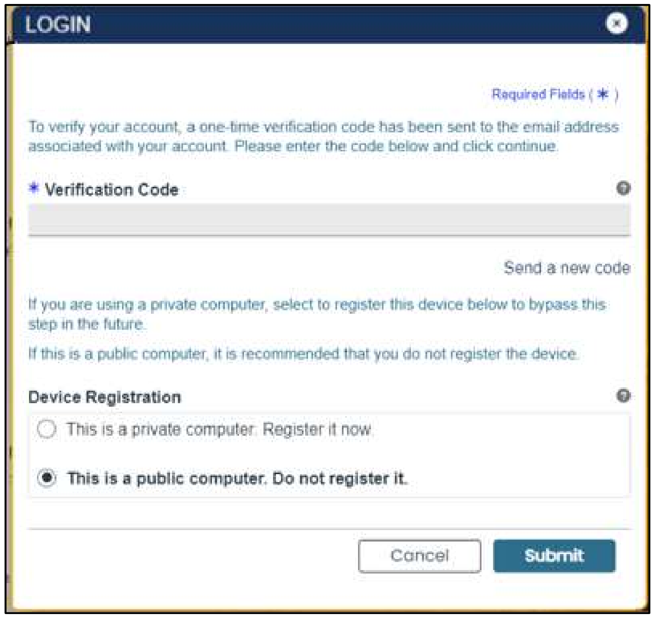


Figure 15. Multi-Factor Authentication Code Panel

5. You will receive an email at the email address associated with the account containing the **Verification Code.**

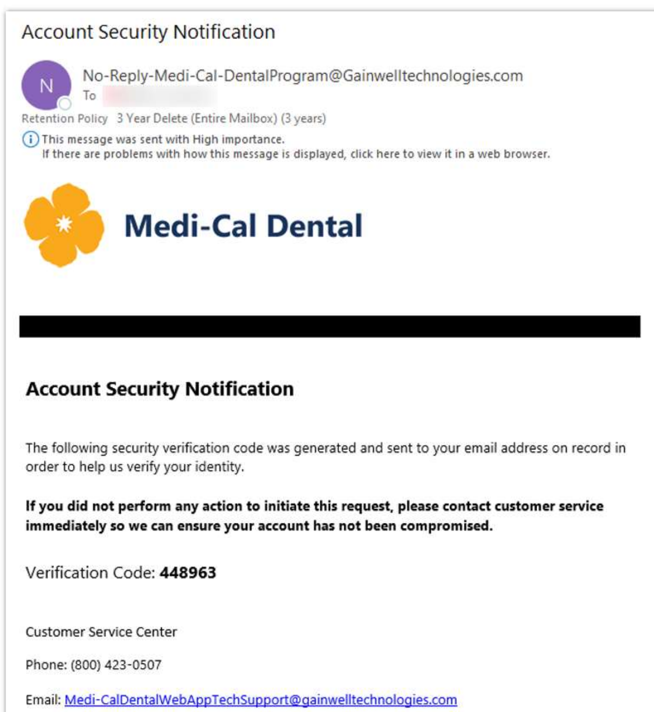


Figure 16. Multi-Factor Authentication Email – Containing the Verification Code

6. Enter the **Verification Code** from the email and Click **Submit** on the MFA panel.

7. Upon validation of the MFA, the **Provider Portal Home** page will display.

Provider Portal Home Page

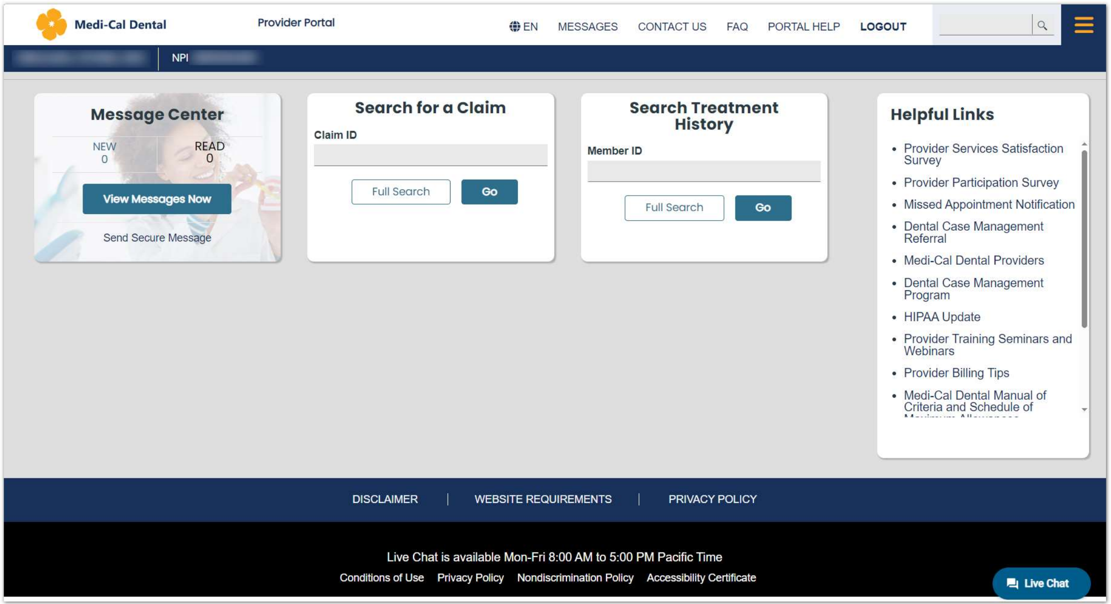


Figure 17. Provider Home Page

4 Login Errors

If the credentials you entered are invalid, an **Invalid Credentials** error message displays.

"Resolve the following form field errors and try again. Your username or password doesn't match what we have on file. Try signing in again or choose Forgot User Name or Forgot Password for help."

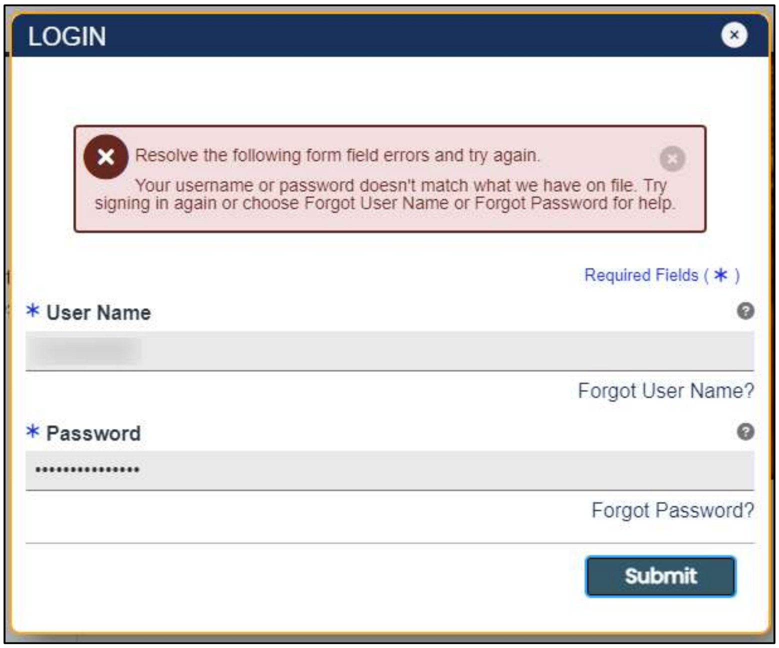


Figure 18. User Name and Password Not Valid Error Message

4.1 Unlock Portal Account

1. You are allowed a maximum of three failed attempts to log in. More than three failed attempts to log in will automatically lock the account.
2. A message will display informing you of the next steps to take to unlock the account.

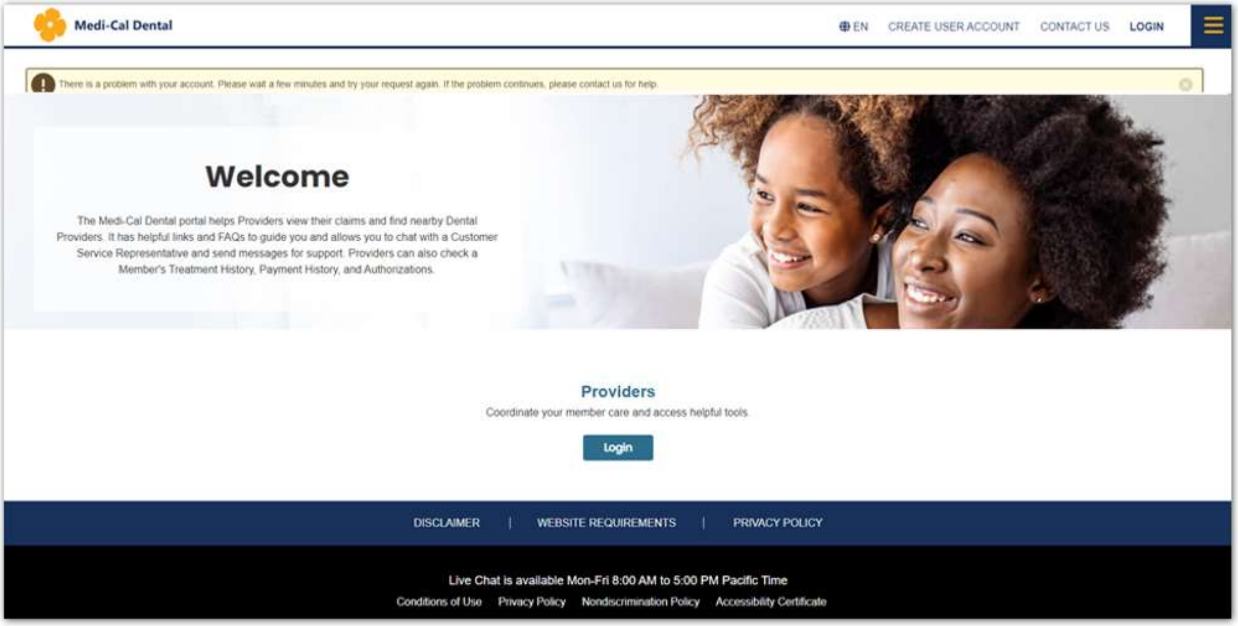


Figure 19. Unable to Login Error – When Provider Tries to Log In with Invalid Credentials

3. An email will be sent with instructions on how to unlock the account.

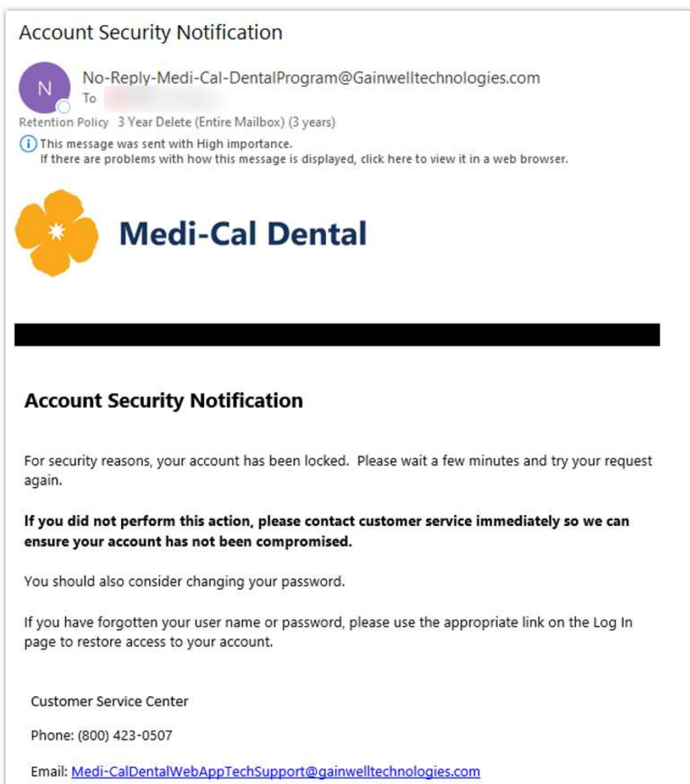


Figure 20. Account Locked Email – When Provider Exceeds the Maximum Login Attempts

4.2 Request User Name

You can request a User Name reminder on the LOGIN panel by clicking the **Forgot User Name?** link and following the listed steps.

1. Click the **Forgot User Name?** link on the LOGIN panel.

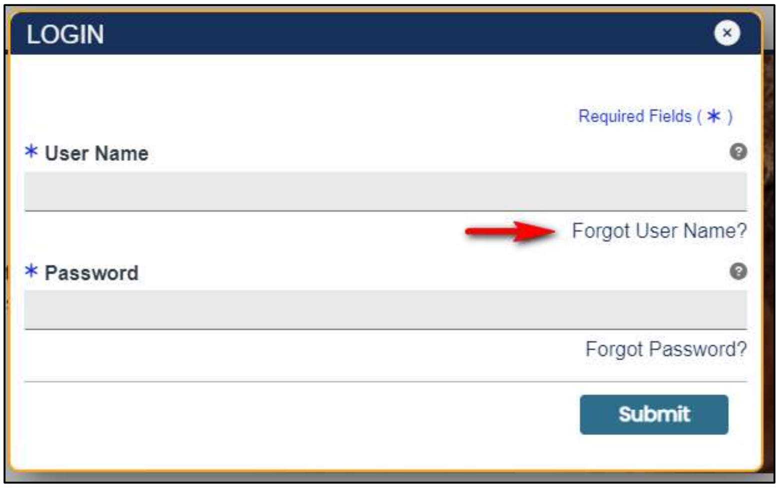


Figure 21. Forgot User Name Link

2. The FORGOT USER NAME panel displays.

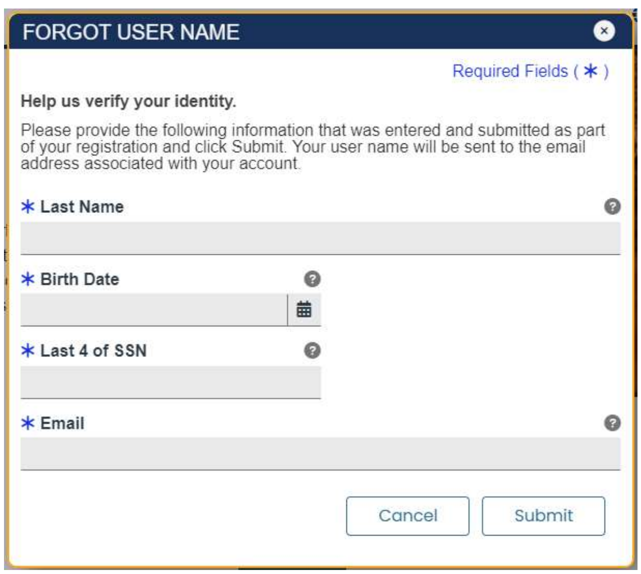


Figure 22. Forgot User Name Panel

3. Enter the following account information:
   - Last Name
   - Last 4 digits of Payment ID or Tax ID

    - Date of Birth
    - Email Address used during registration

4. Click **Submit**.
5. The following message displays:

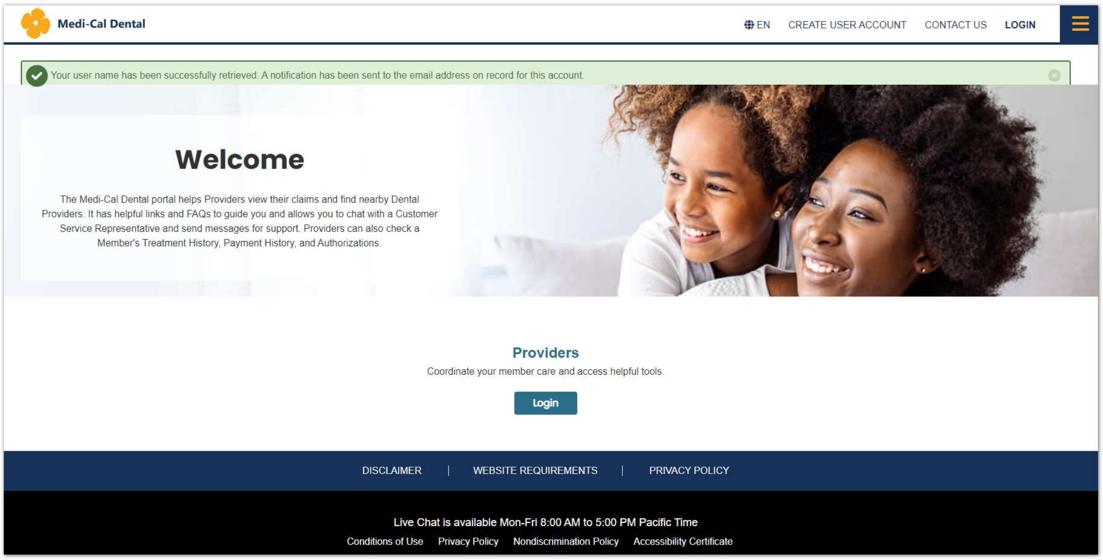


Figure 23. User Name Successfully Retrieved Message

6. You will receive an email that contains the User Name.

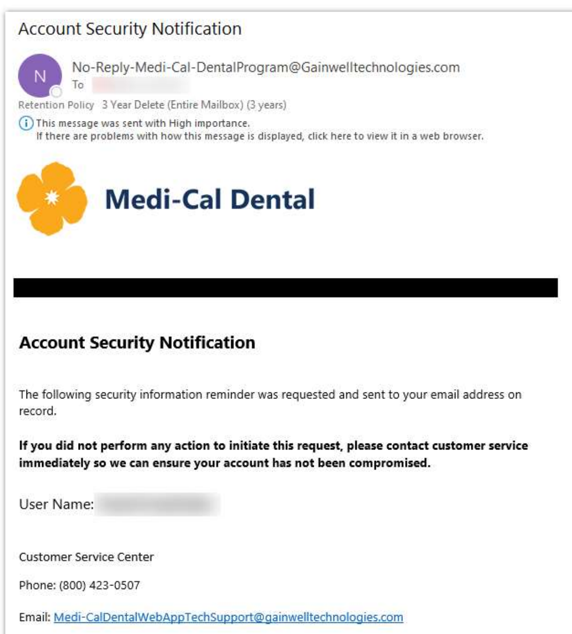


Figure 24. Email Sent to Provider for User Name Reminder

7. If you entered incorrect information to retrieve your User Name, an error message displays.

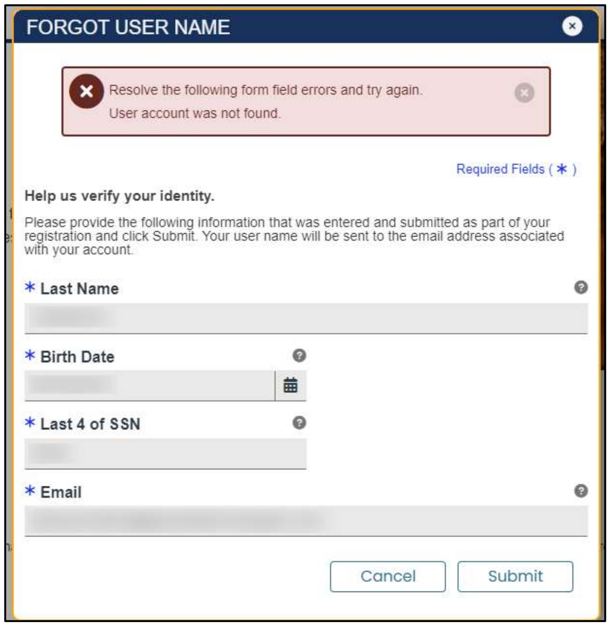


Figure 25. Forgot User Name – Error Message

4.3 Reset User Password

You can request a password reset on the LOGIN panel.

1. Click the **Forgot Password?** link.

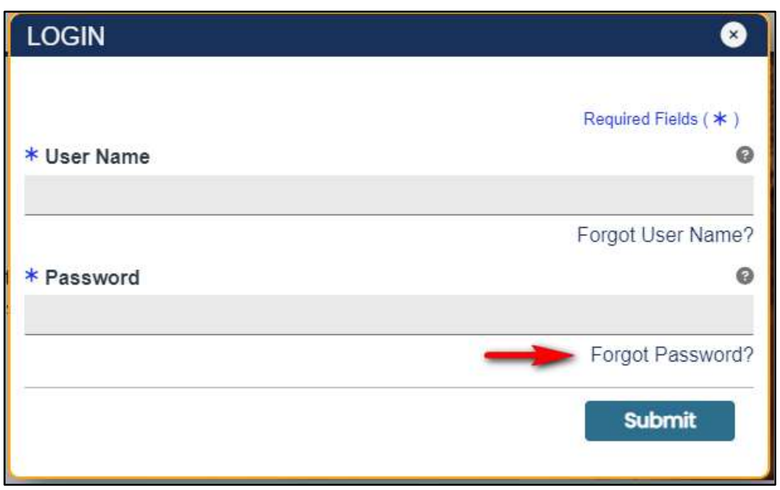


Figure 26. Forgot Password Link

2. The FORGOT PASSWORD panel displays.

Figure 27. Forgot Password Panel

3. Enter the information used during registration.
   - Username
   - Last Name
   - Last 4 digits of Payment ID or Tax ID
   - Date of Birth
4. Click **Next**.
5. If the information submitted is correct the Verification Code panel displays.

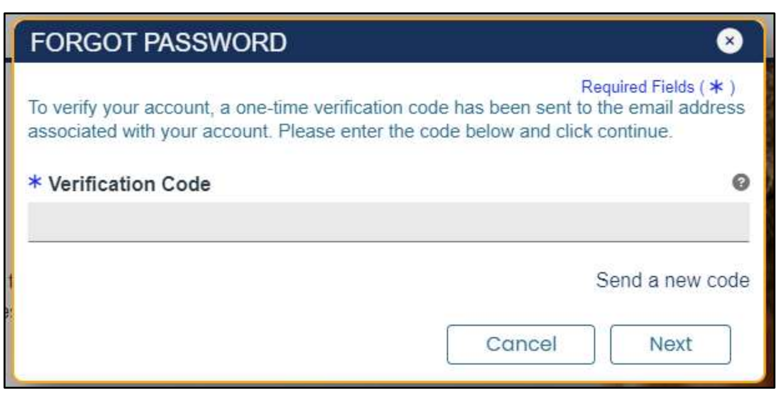


Figure 28. Forgot Password Verification Code Panel

6. An email containing the **Verification Code** is sent to the email address associated with the account that was provided during registration.

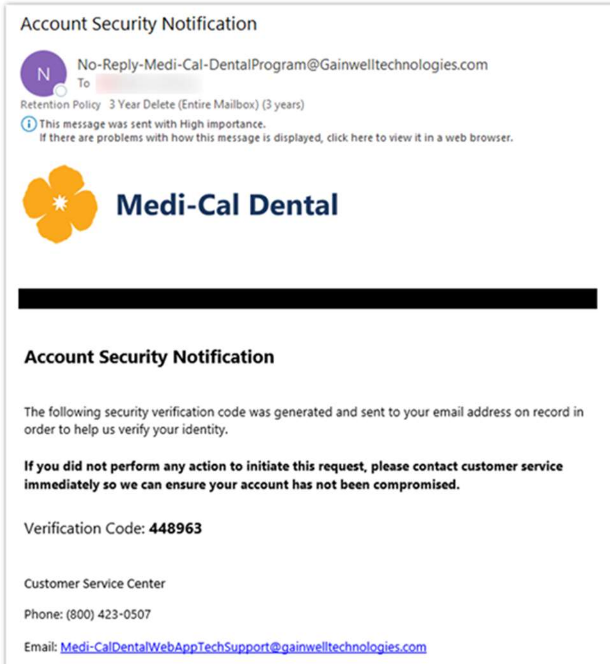


Figure 29. Account Notification Email – Containing Verification Code

7. Enter the **Verification Code** from the email in the FORGOT PASSWORD panel.
8. Click **Next.**
9. After the **Verification Code** is entered and validated, enter and confirm the new password.

Figure 30. Create New Password Panel

NOTE: *Rules for creating a Password:*

- Cannot contain the user's Account Name or parts of the user's Full Name that exceed two consecutive characters.
- Must be at least 14 to 20 characters in length.
- Must contain 3 of the following 4 categories:
    - English uppercase characters (A through Z)
    - English lowercase characters (a through z)
    - Base 10 digits (0 through 9)
    - Special characters (such as ! ? @ # $ & * = +` { } [ ] ( ) / \ " ; ', .)
- Cannot be changed more than once in the same day.
- Cannot be the same as the last 10 passwords used.

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10. Click **Save**.
11. A message displays stating that the password has successfully been updated.

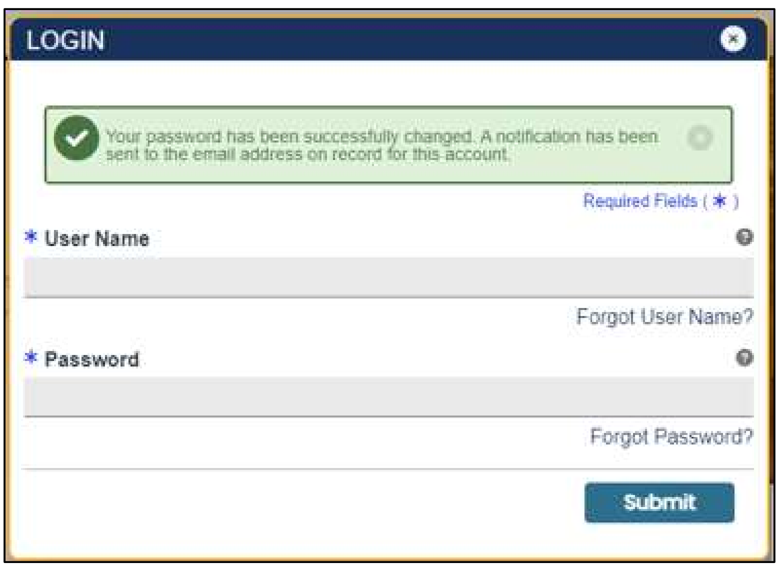


Figure 31. Password Has Successfully Been Changed Message

12. An email is sent to the email address provided during registration stating that the password has been updated.

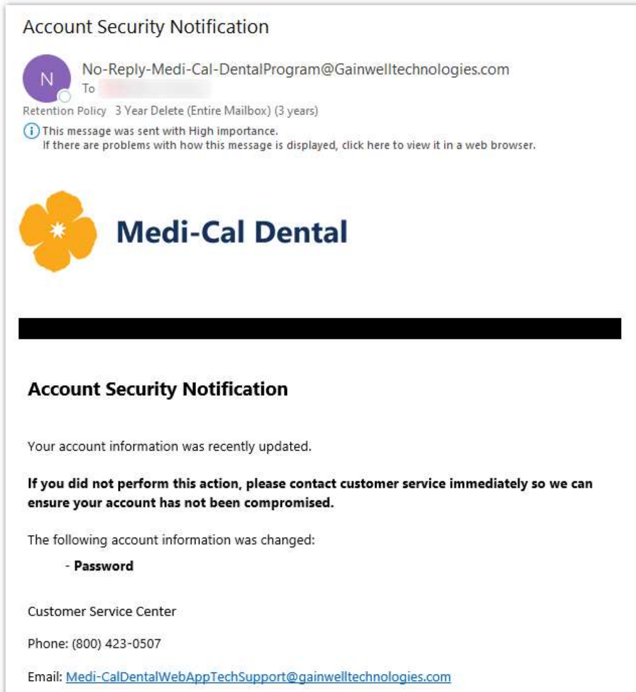


Figure 32. Account Notification Email – Password Has Been Changed.

NOTE: *Providers are required to change their password every 60 days. If you click on the* ***Submit*** *button after entering the portal credentials and the password is expired, the* ***Password Expired*** *panel displays for you to change the password*.

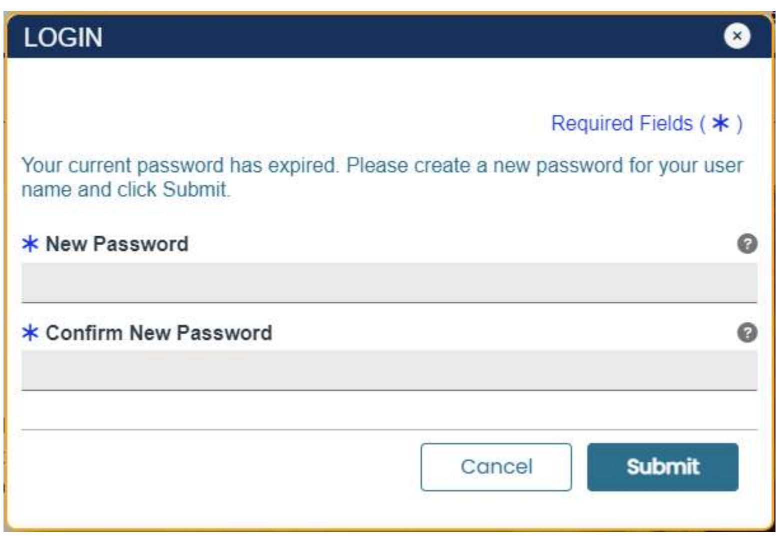


Figure 33. Password Expired - Login Panel

13. Enter and confirm the new password, according to the following password rules.

NOTE: *Rules for creating a Password:*

- Cannot contain the user's account name or parts of the user's full name that exceed two consecutive characters.
- Must be at least 14 to 20 characters in length.
- Must contain 3 of the following 4 categories:
    - English uppercase characters (A through Z)
    - English lowercase characters (a through z)
    - Base 10 digits (0 through 9)
    - Special characters (such as ! ? @ # $ & = +` { } [ ] ( ) / \ “ ; ’, .)
- Cannot be changed more than once in the same day.
- Cannot be the same as the last 10 passwords used.

14. Click **Submit.**

15. A panel displays with the message, “Your password has been successfully changed. A notification has been sent to the email address on record for this account.” displays.

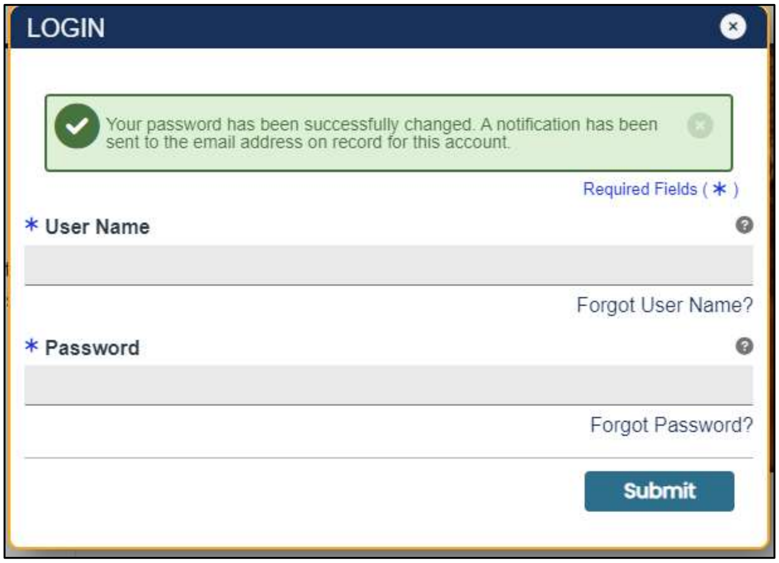


Figure 34. Password Has Successfully Been Changed Message

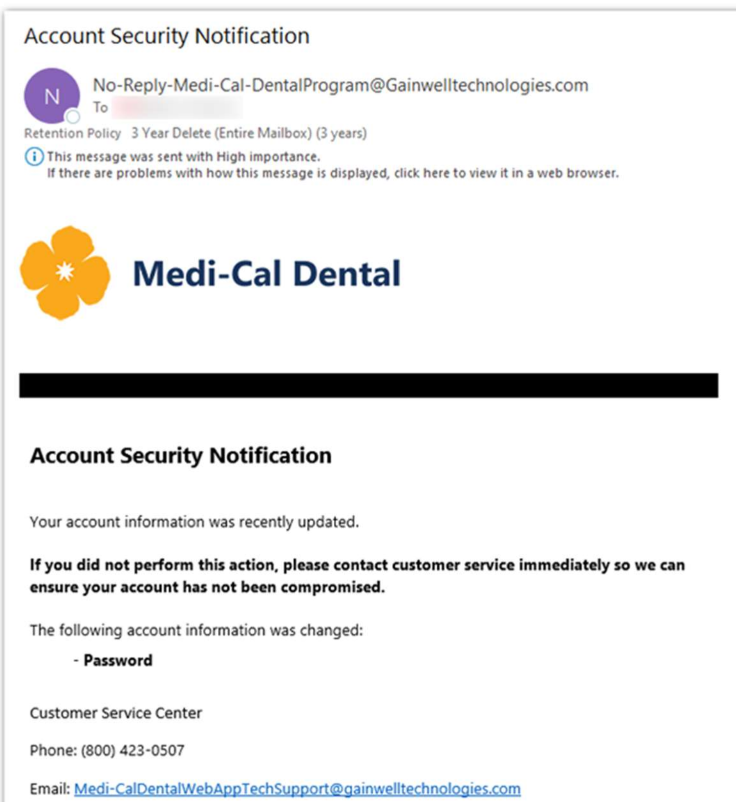


Figure 35. Account Notification Email – Password Has Been Changed

4.4 Change Your Password in Profile Maintenance

You can change the account password prior to the password expiring.

1. Navigate to the **Provider Portal Welcome** page.
2. Click **Login** and enter your login credentials.

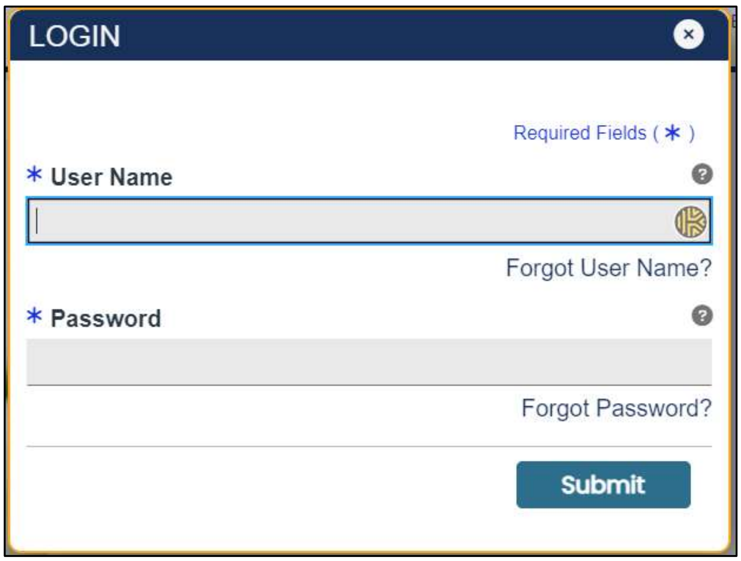


Figure 36. Provider Portal Login Panel

3. Click **Submit**.

4. The **Provider Portal Home** page displays.

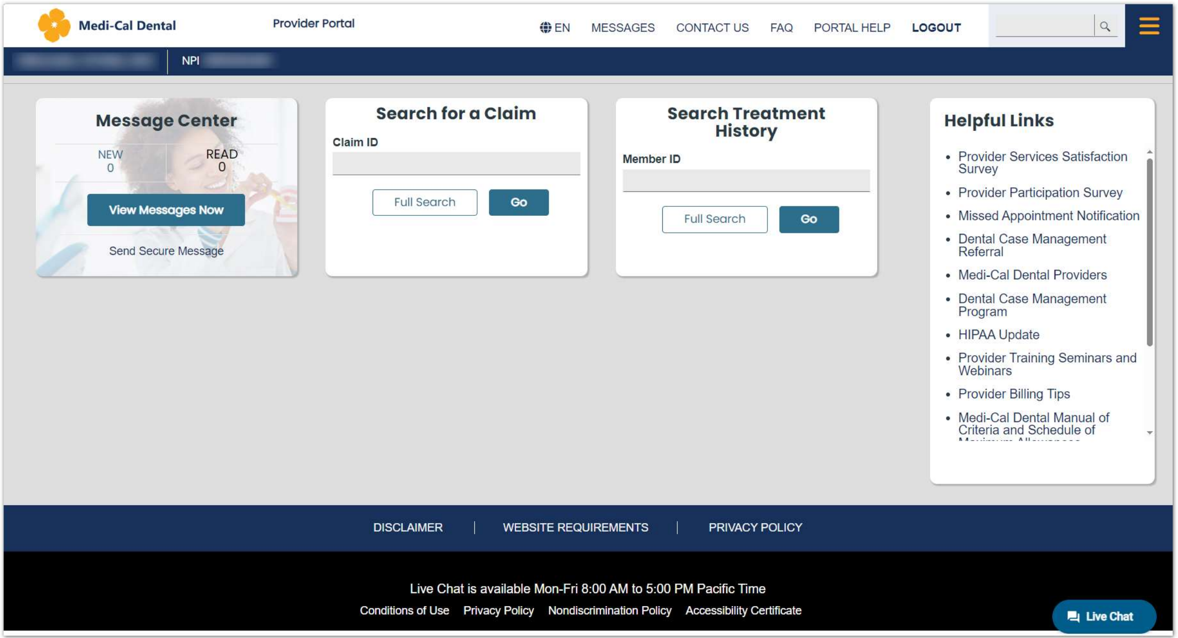


Figure 37. Provider Portal Home Page

5. Click the Hamburger icon on the home page and select or hover over the Maintenance menu option.

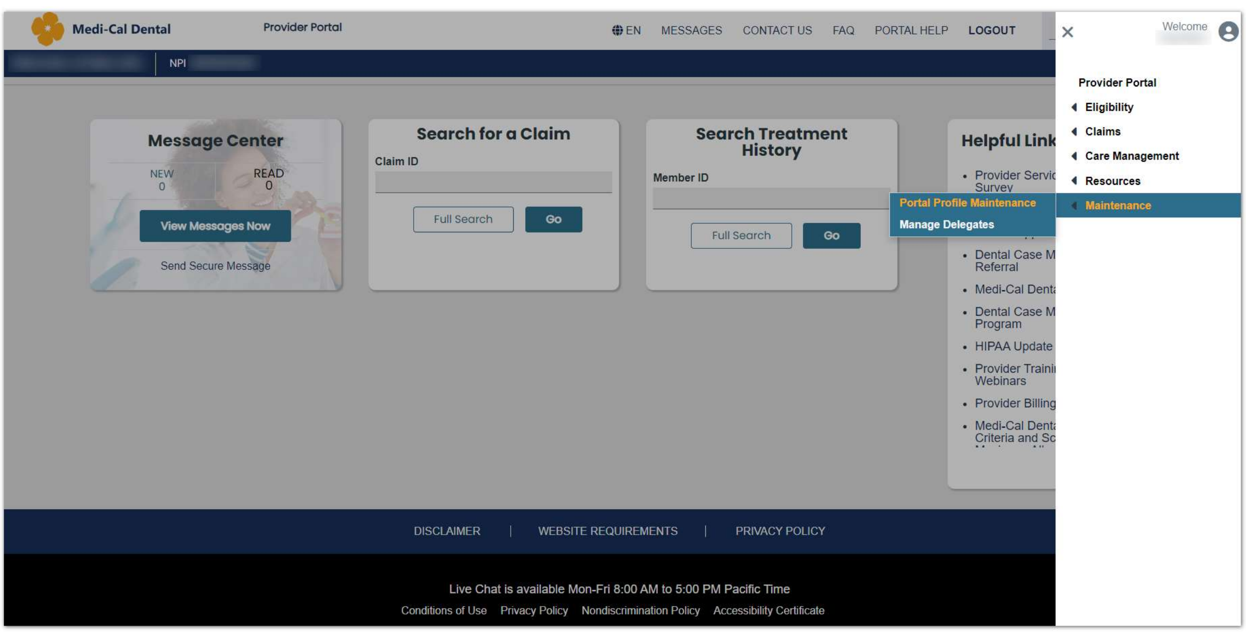


Figure 38. Provider Portal Home Page

6. Select **Portal Profile Maintenance** from the main menu.

7. The **My Account Profile** page displays:

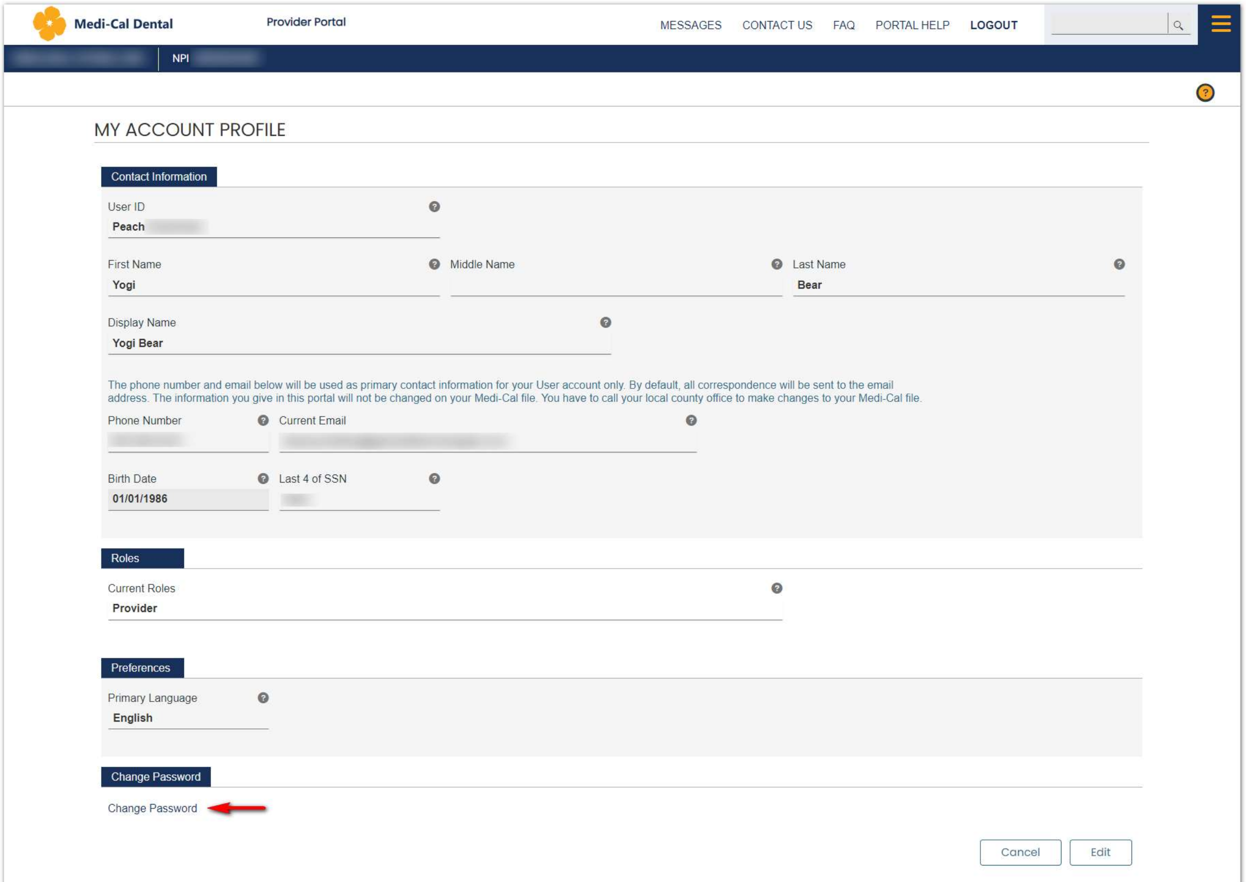


Figure 39. My Account Profile Page

8. Click the **Change Password** link.
9. Enter existing **Password**, enter a **New Password**, and **Confirm New Password**.
10. Click **Change Password**.

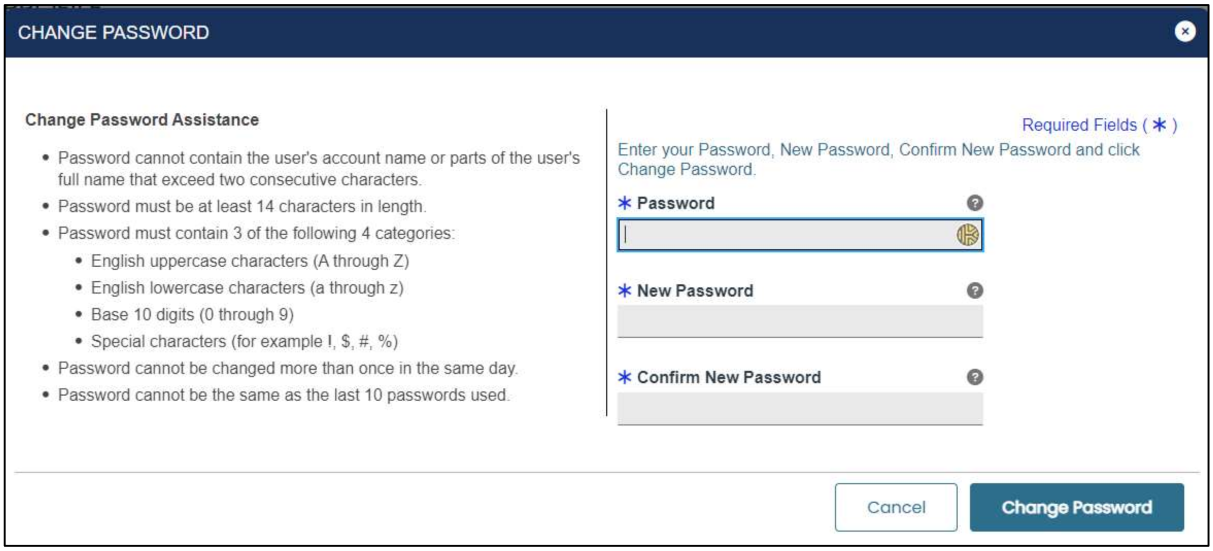


Figure 40. My Account Profile, Change Password Panel

11. When the password is successfully changed, an email is sent to the email address provided during registration.

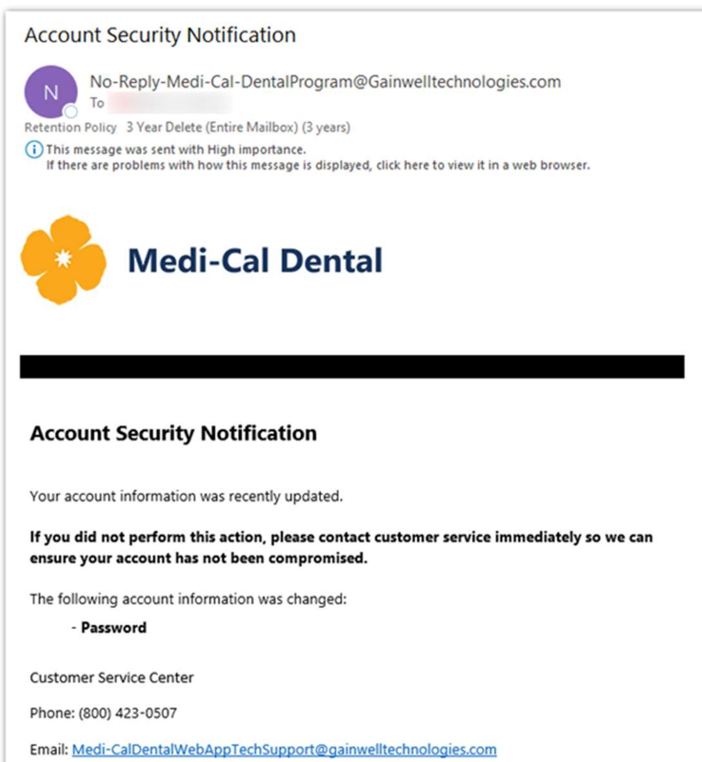


Figure 41. Account Notification Email – Password Has Been Changed

5 About the Portal

5.1 At a Glance Bar

This bar allows you to change the Portal to your preferred language, quickly view any broadcast messages regarding the Medi-Cal Dental information or portal account, and view contact details for Customer Support.

Figure 42. Preferred Portal Language

EN

Selecting this allows you to indicate your preferred language, English or Spanish.

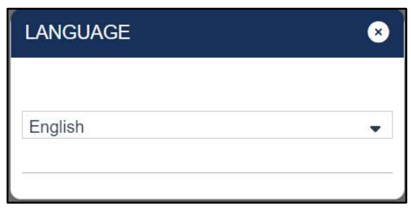


Figure 43. Selecting Language

Messages

Broadcast messages automatically display when you log in. This can arise from system outages, system upgrades, new features added, essential information messages, and various other reasons.

Any messages you must acknowledge, are displayed at the top of the message list. Acknowledged messages must be acknowledged before you can navigate to the Portal home page.

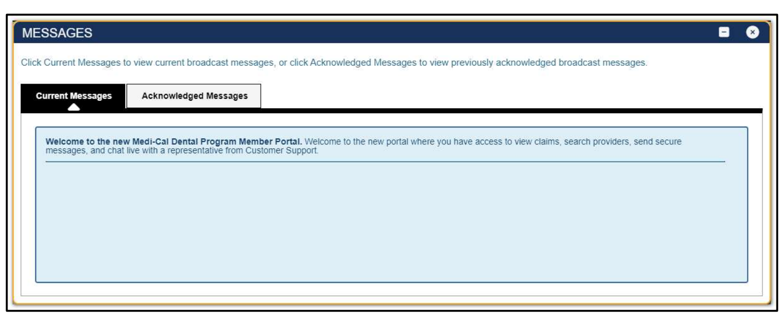


Figure 44. Broadcast Messages

Contact Us

Enables you to contact Customer Service Center by phone, (including an automated response line) or mail.

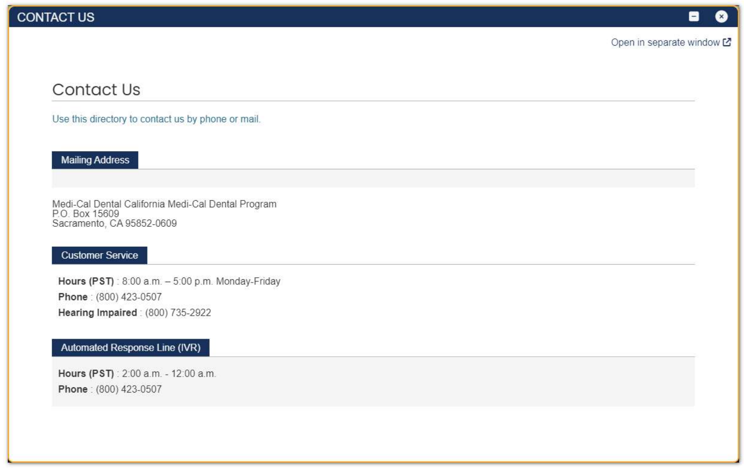


Figure 45. Contact us

FAQ

Display questions and answers related to common topics about or related to the information contained within the application. To view the information in a separate panel, you can click **Open in Separate Window**. Depending on the browser, the page detaches from the application and can be relocated on the screen or moved to another screen.

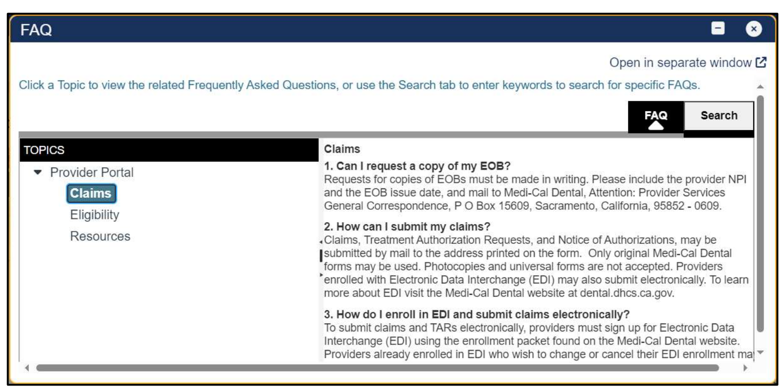


Figure 46. FAQ

Portal Help

Online source for the Provider Guide. The Provider Guide tab displays information about each menu option and page contained within the application.

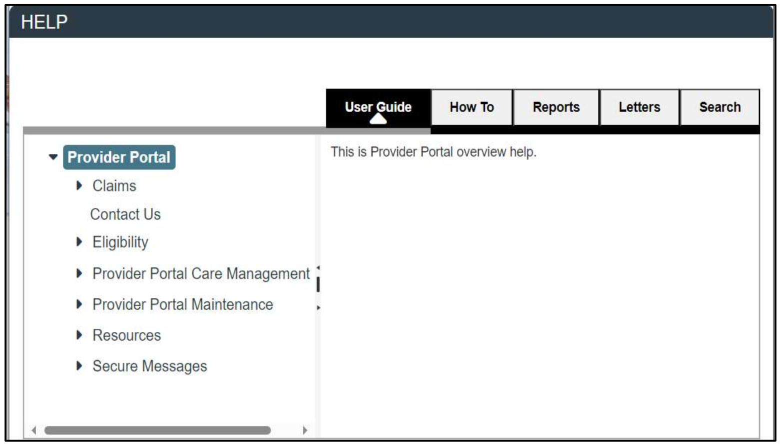


Figure 47. Portal Help

Google Search

Enables Google searches; results are returned in a new browser tab.

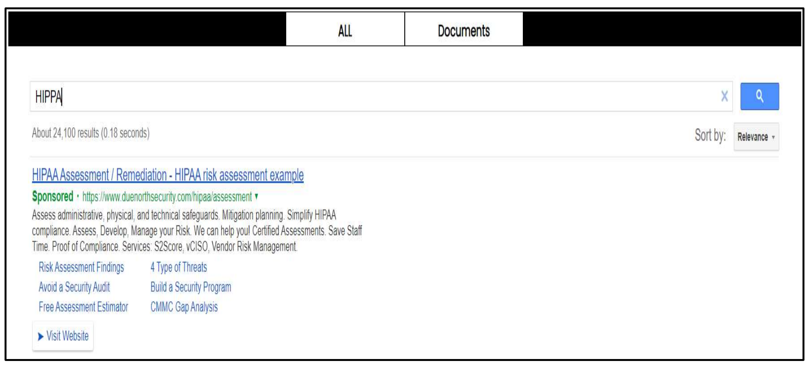


Figure 48. Google Search

5.2 Information Panels

Two Information Panels are displayed at the top of the **Provider Portal Home** page, just below the navigation menu to display information about the logged-in Provider. These panels indicate if the Provider is logged in as a Provider or a Delegate.

Provider Information Panel (PIP)	Displays information about Providers on all panels in the Portal.
Delegate Information Panel	Displays information about Delegates and the Provider on whose behalf they are working.

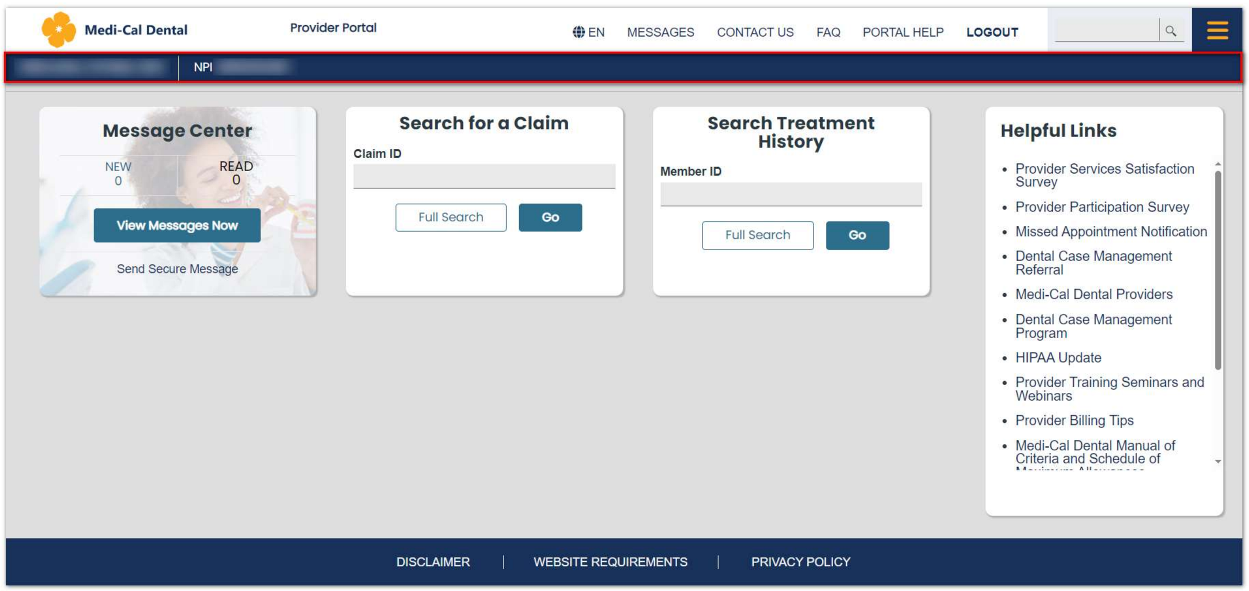


Figure 49. Provider Information Panel

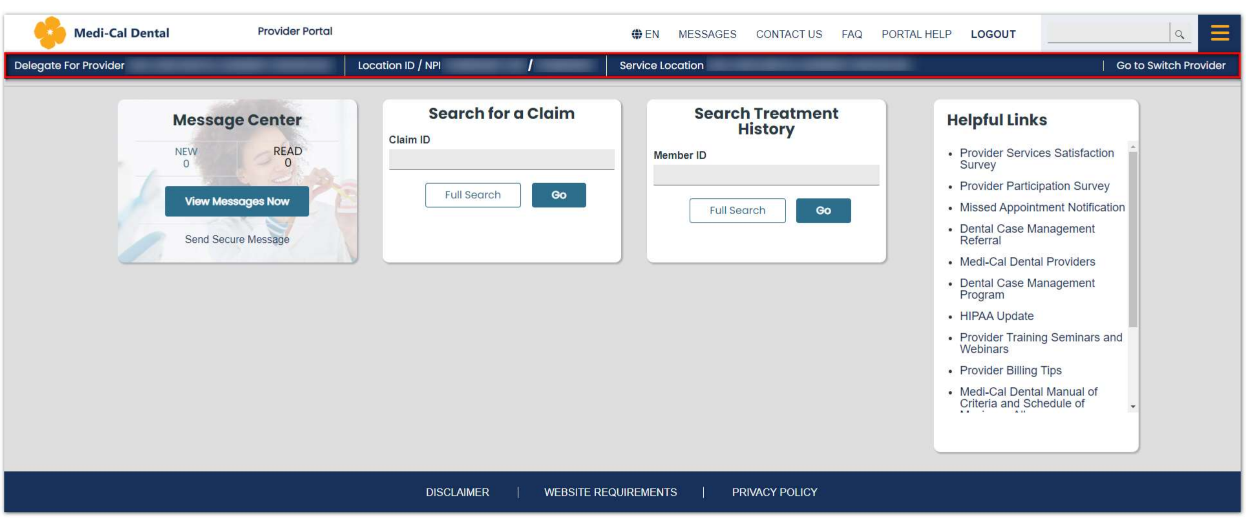


Figure 50. Delegate Information Panel

5.3 Quick Link Tiles

You can use the quick link tiles that appear on the home page to access frequently used portal functions, such as Searching for a Claim, Sending Secure Messages, and Searching Treatment History, without having to use the navigation menu.

Enter a Claim ID or Member ID and click **Go** to navigate to the page where the information will display. You can also click the **Full Search** button to navigate to the full function page.

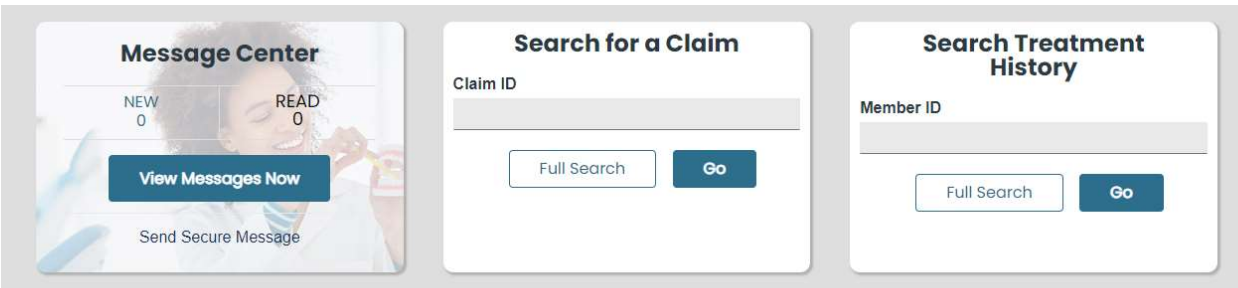


Figure 51. Quick Link Tiles

5.4 Navigate the System

The navigation menu provides easy access to all available areas of the Provider Portal. The navigation menu is accessible by clicking the **Hamburger** icon on the **Provider Portal Home** page. You can hover your mouse over the navigation menu topics to reveal sub-menus.

The following example illustrates the Claims sub-menus.

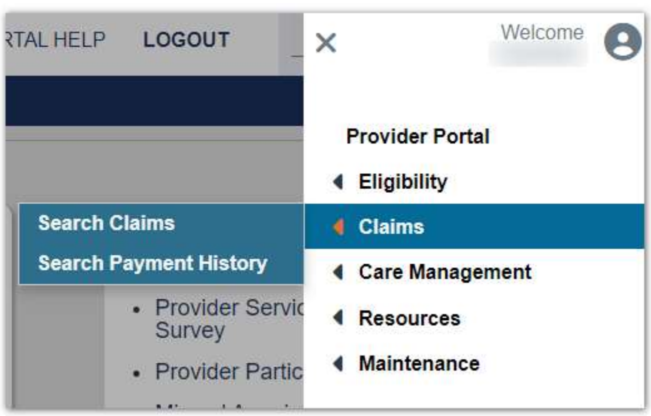


Figure 52. Example of the Claims Sub-Menus

5.5 Helpful Links

This panel provides hyperlinks for quick access to forms and Information to assist you with managing your Medi-Cal Dental accounts. Links to important documents and contact information on the Medi-Cal Dental Website are displayed. You will also find links to the Provider Guides, Provider Forms, and the Dental Case Management Referral Form and Missed Appointment Notification Form.

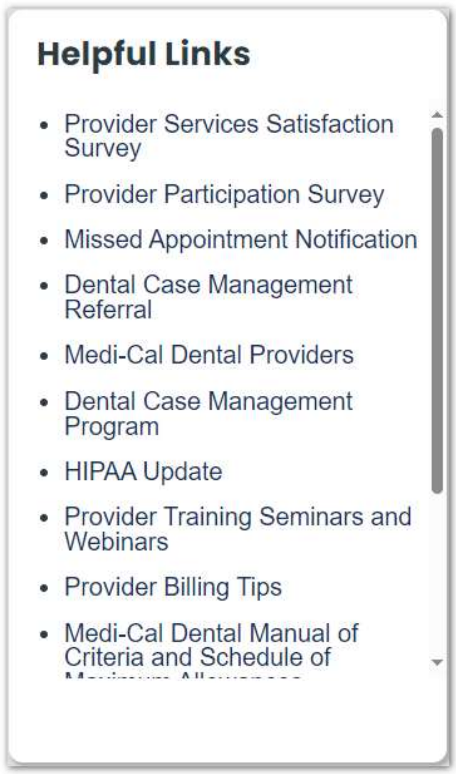
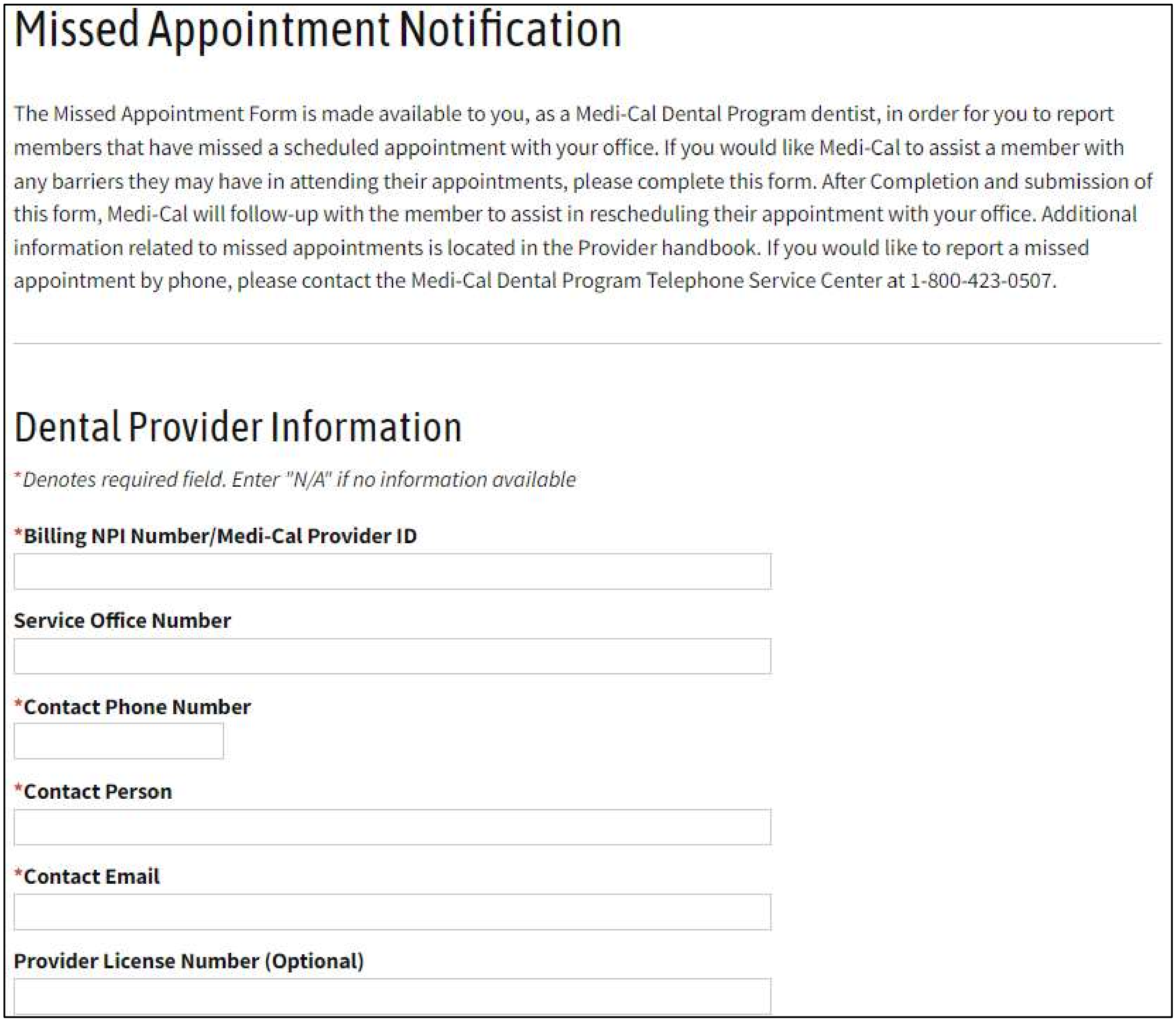


Figure 53. Helpful Links Panel

5.5.1 Submit a Webform

The webform links will navigate you directly to the Dental Case Management Referral or Missed Appointment Notification webforms. You will complete all required fields and include all additional information that would help assist with research and resolving the submissions.

Review all required fields and attachments before clicking **Submit**. Once you have verified the information is correct, you can submit the webform. You will receive a response from a Customer Service Center Representative within two business days at the email address associated with the Providers' NPI submitted on the form.



Missed Appointment Notification

The Missed Appointment Form is made available to you, as a Medi-Cal Dental Program dentist, in order for you to report members that have missed a scheduled appointment with your office. If you would like Medi-Cal to assist a member with any barriers they may have in attending their appointments, please complete this form. After Completion and submission of this form, Medi-Cal will follow-up with the member to assist in rescheduling their appointment with your office. Additional information related to missed appointments is located in the Provider handbook. If you would like to report a missed appointment by phone, please contact the Medi-Cal Dental Program Telephone Service Center at 1-800-423-0507.

Dental Provider Information

**Denotes required field. Enter "N/A" if no information available*

***Billing NPI Number/Medi-Cal Provider ID**

Service Office Number

***Contact Phone Number**

***Contact Person**

***Contact Email**

Provider License Number (Optional)

Figure 54. Example of Missed Appointment Form

5.6 Rules for Entering Information

1. All required fields are marked with a red asterisk (*) and must be populated to save the entry. Many fields within the application are Drop-downs that enable you to select a value; others require them to enter a value.
2. When displayed in a column, use the **Sort** icon to sort information in ascending or descending order, and use the filter icon to filter information.
3. Use the **Collapse** and **Expand** icons to customize page.
4. Click the help icon ( ) above each field to find context-specific help.

5. Click the yellow help icon ( ) in the top right for quick access to the Portal Help Guide.
6. Click **Cancel** to return to the previous panel or page.
7. Click **Reset** to clear current fields and display previously saved values and any in-focus Provider and/or Service Location information.
8. When search results are returned in rows, double-click the **Row** to display detailed information.
9. Click **Back to Search Results** to return to the original search page.
10. Click Export to Excel or Export to PDF to export the search results.
11. Navigation arrows appear on most pages. You can specify the number of items to appear per page.

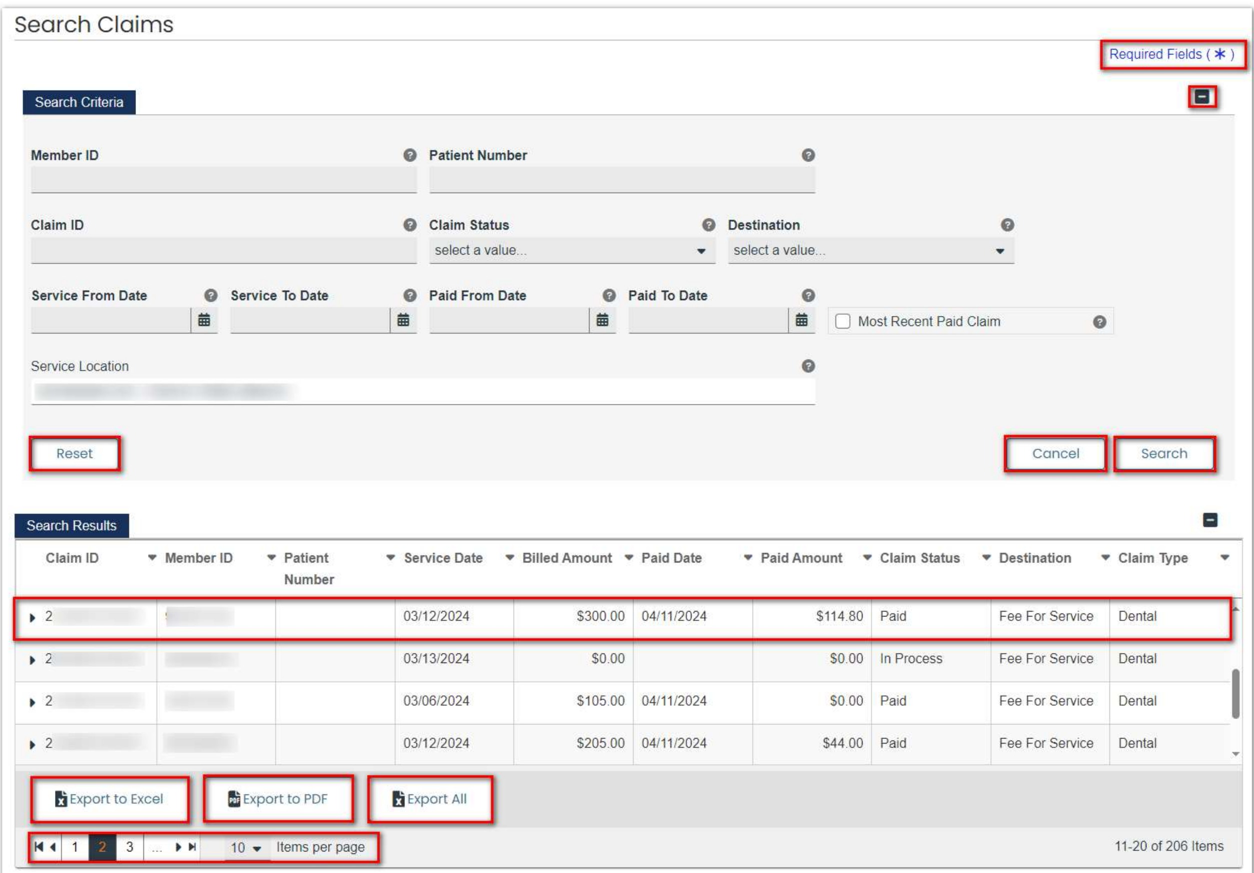


Figure 55. Rules for Entering Information

5.7 Favorite Service Location

This feature allows you to select and set in focus a service location when the Provider has multiple service locations. When you initially log in, no service location is set in focus.

When you access any page within the Provider Portal where a Service Location Drop-down is available and you select a service location, a hollow **Star** icon appears giving you the option to set a service location in focus.

When the **Star** icon is clicked and changes color, that service location is set into focus and its details (Service Location # and Name) display on the PIP, and the service location selected is pre-selected on the Service Location Drop-down as you navigate to other pages that have a Service Location Drop-down for the logged in Provider account.

You have the option to set a different service location in focus at any time by selecting a new location from the Service Location Drop-down and clicking the **Star** icon.

A service location in focus can be taken out of focus by clicking the **Star** icon and making it hollow again.

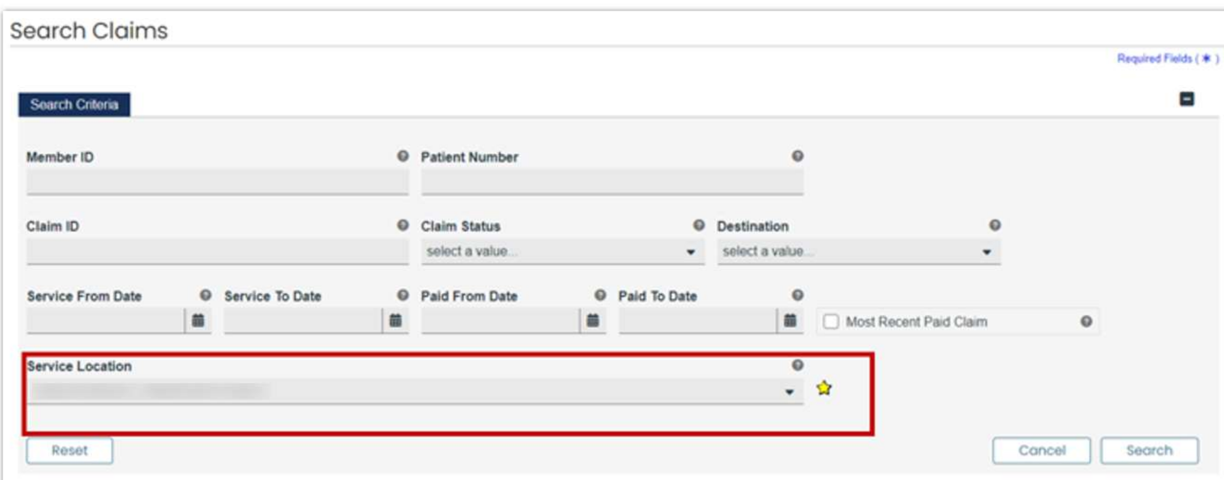


Figure 56. Example of Service Location in Focus

5.8 Live Chat

The **Live Chat** button gives you the ability to correspond with a Customer Service Center Representative via real-time chat. The **Live Chat** function is available during business hours (listed in the footer) during which you can chat with an Agent in your preferred language of English or Spanish.

Figure 57. Live Chat Button

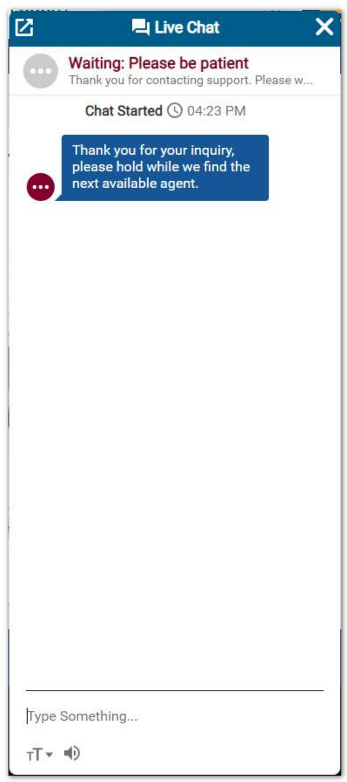


Figure 58. Live Chat Message Panel

5.9 Portal Footer

The Portal Footer provides links to the following:

- Conditions of Use
- Privacy Policy

- Nondiscrimination Policy
- Accessibility Certificate

Figure 59. Footer Bar

6 Message Center

You can access messages Sent To and Received From the Customer Service Center team by using the **Message Center** quick tile panel.

The **Message Center** quick tile also informs you of returned messages and messages that have previously been read by keeping a count that you can view upon login.

Figure 60. Message Center Quick Tile

6.1 View Messages

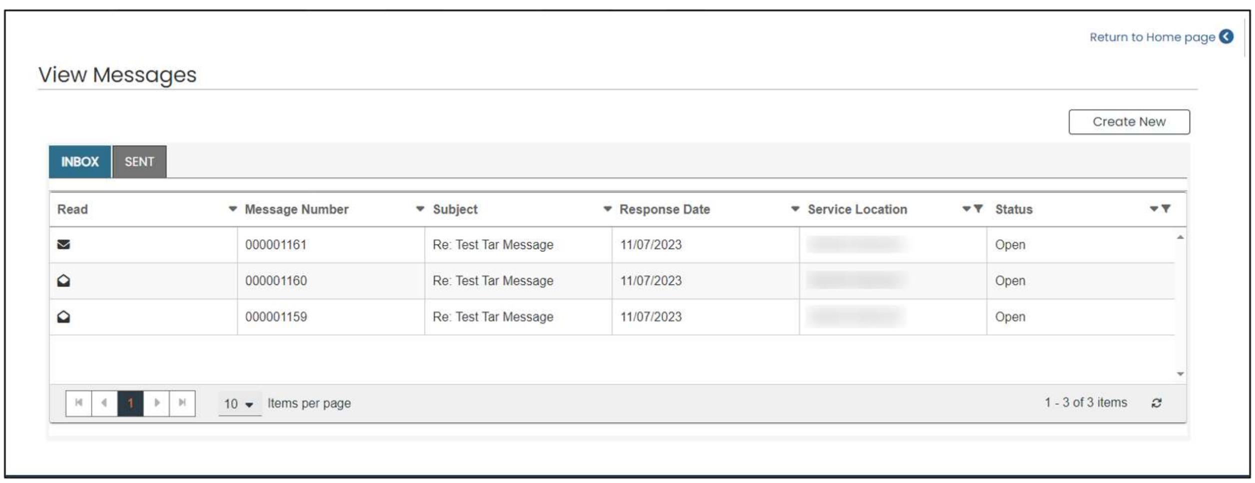


Figure 61. View Messages

1. Click the link **View Messages Now** to view your **Inbox** and **Sent** box.
2. Click the **Sent** box to view messages initiated by you and sent to the Customer Service Center team.
3. Click the **Inbox** to view responses from our Customer Service Center team.

6.2 Send Messages

Click the **Send Secure Messages** link to send a new secure message, or click the **Create New** button to create a secure message.

All fields with an asterisk (*) must be populated to submit the entry.

You can send messages about questions such as Claim History, Initiating a Complaint, or other issues. Select the **Category** related to the inquiry, also include a **Reason Code** when sending secure messages to the Customer Service Center. The **Reason Code** field is available for you to opt for the selected category on the **Create Secure Message** page. You can also enter a Provider/Facility Name when sending secure messages.

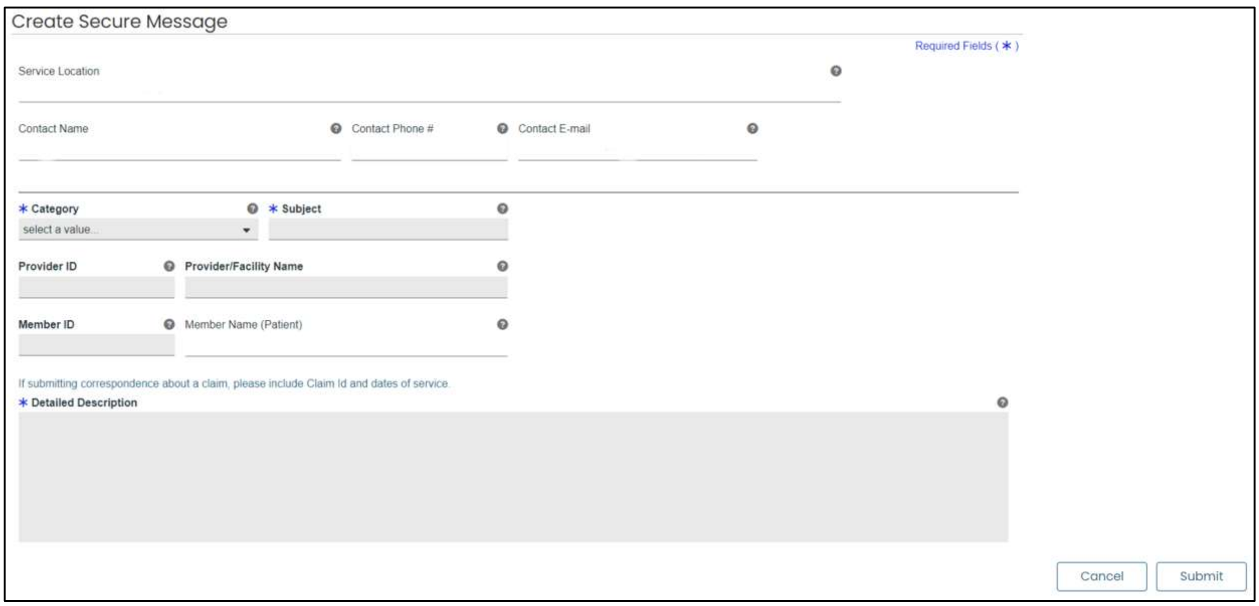


Figure 62. Create Secure Message Page

7 Treatment History

The **Treatment History** page enables you to view dental treatment history for a selected member.

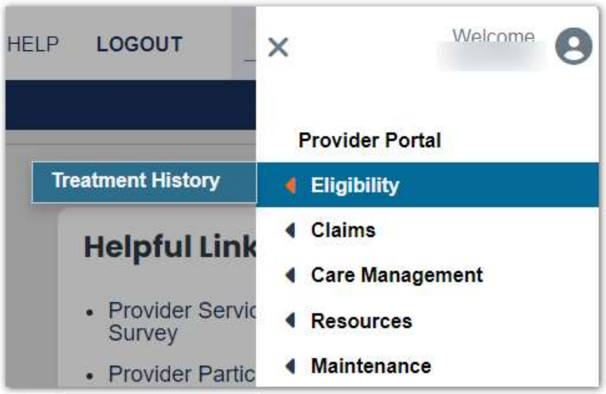


Figure 63. Provider Portal Home Page

1. Click the **Hamburger** icon on the home page
2. Select or hover over the **Eligibility** menu option.
3. Select **Treatment History** to display the **Search Treatment History** page from the main menu.

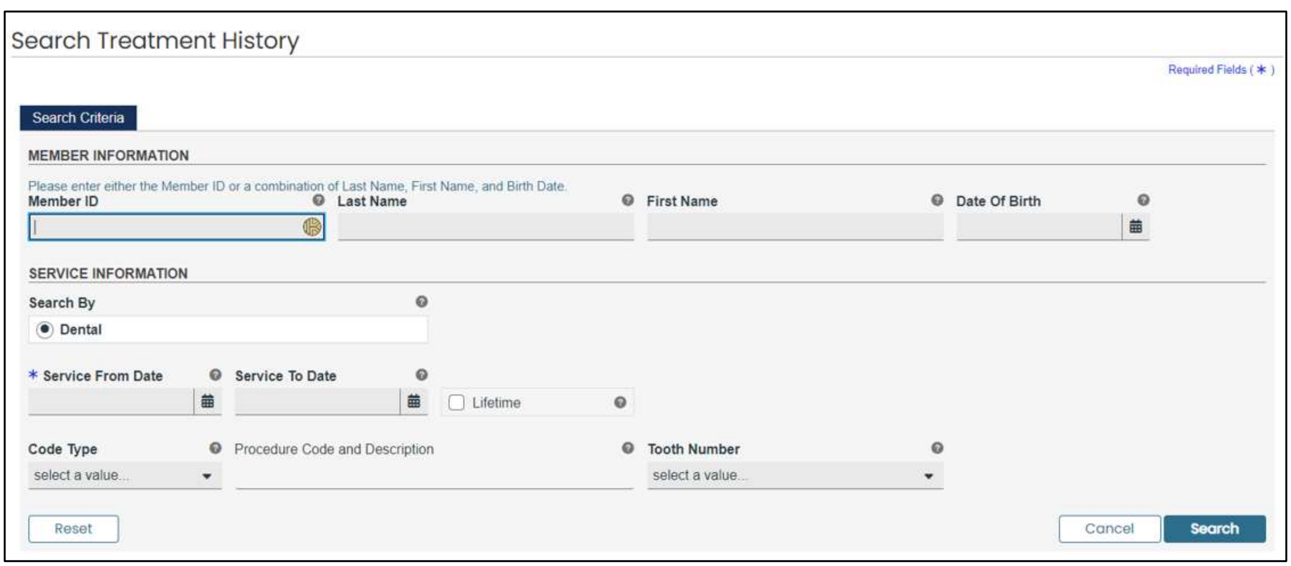


Figure 64. Treatment History Page

4. Enter desired criteria and click **Search**. Values include:
    - Enter the Member ID or a combination of the Last Name, First Name, and Birth Date in the Member Information sub-panel.
    - Dental is selected by default in the Search By options.
    - Enter a value in the following fields:
        - Service from Date (Required)
        - Service to Date
        - Code Type
        - Procedure Code and Description
        - Tooth Number
5. Select the **Lifetime** check box to retrieve the lifetime history (five years) of the patient.

    A successful search displays the following Dental results:
    - Category
    - Service Date
    - Procedure Code and Description
    - Tooth Number
    - ARCH/QUAD Code
    - Tooth Surface
    - Performing Provider

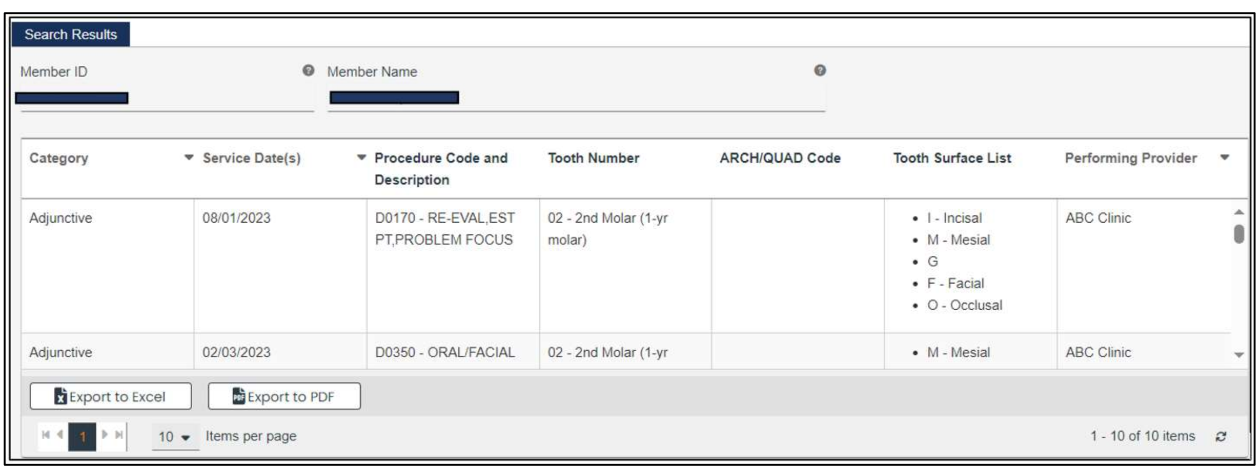


Figure 65. Treatment History – Search Results

NOTE: *You can sort columns in ascending or descending order. The Export to Excel and Export to PDF will only export information displayed in the results. You can also select the number of items you want to be displayed per page i.e., 5, 10 or 20.*

8 Search Claims

The **Search Claims** page enables you to search for previously submitted Fee-For-Service (FFS) claims for all associated members. At least one search criteria is required to initiate a search.

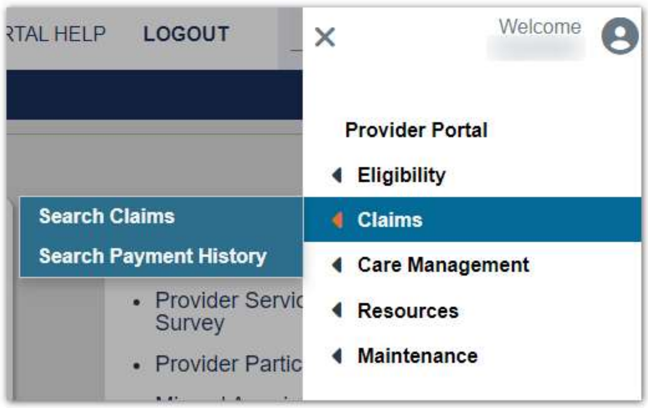


Figure 66. Provider Portal Home Page

1. Click the **Hamburger** icon on the home page.
2. Select or hover over the **Claims** menu option.
3. Select **Search Claims** from the main menu.

The **Search Claims** page displays.

- Single Service Location Provider
- Multiple Service Location Provider

Claim Search Page for a Provider With a Single Service Location

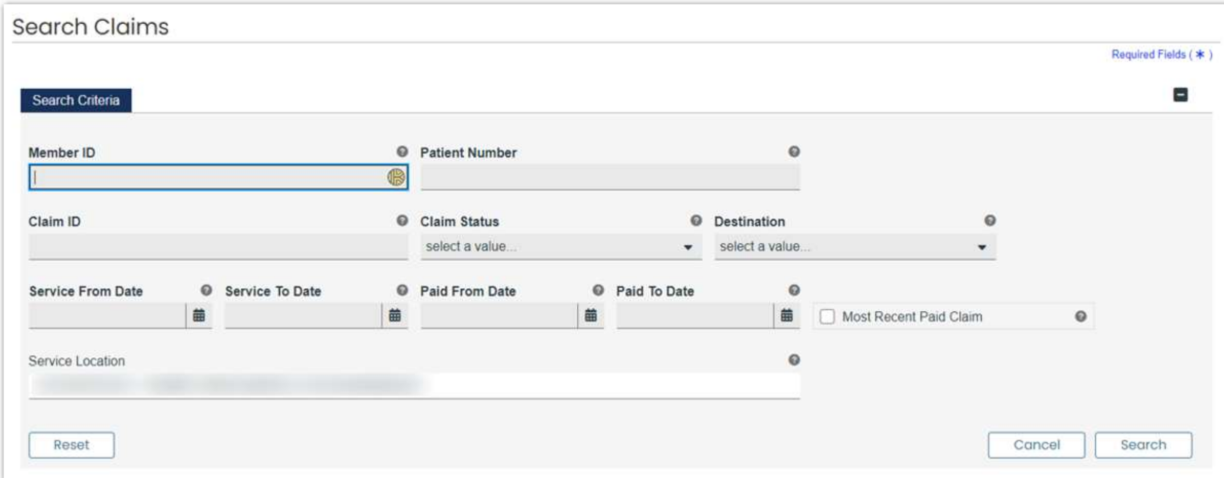


Figure 67. Claim Search Page for a Provider With a Single Service Location

Claim Search Page for a Provider With Multiple Service Locations

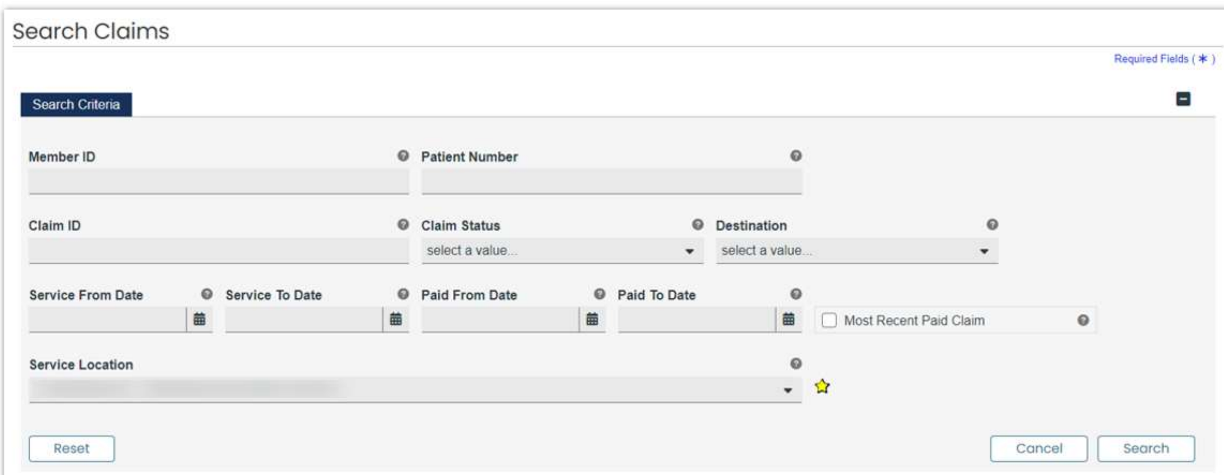


Figure 68. Claim Search Page For a Provider With Multiple Service Locations

You must enter the desired criteria and click **Search**.

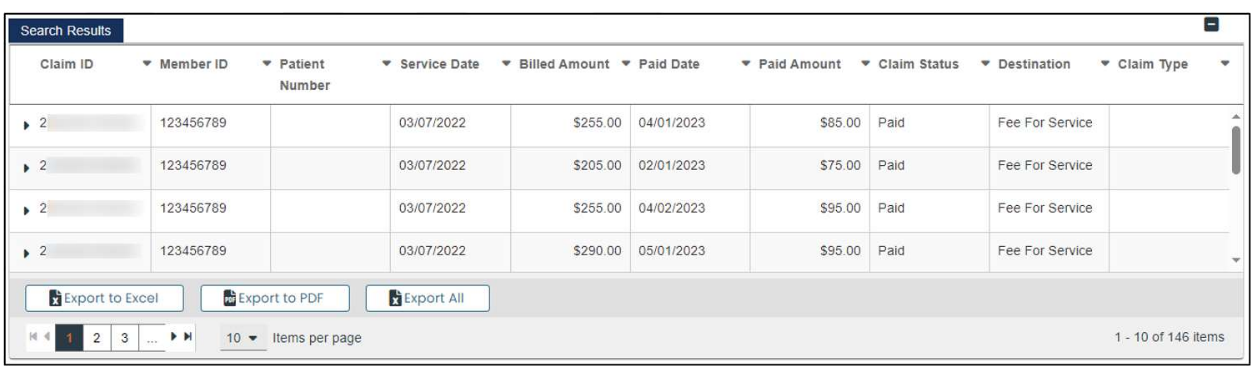
Values include:

- Member ID
- Patient Number
- Claim ID
- Claim Status
- Destination
- Service From Date

- Service To Date
- Paid From Date
- Paid To Date
- Most Recent Paid Claim
- Service Location
    - The Service Location field is read-only with a default value if the Provider only has a single service location. The Drop-down menu is used to select the Service Location if the Provider has multiple service locations.

A successful search displays the following results:

- Claim ID
- Member ID
- Patient Number (not currently in use)
- Service Date
- Billed Amount
- Paid Date
- Paid Amount
- Claim Status
- Destination
- Claim Type
- Claim Status Date (expanded row)


Search Results

Claim ID	Member ID	Patient Number	Service Date	Billed Amount	Paid Date	Paid Amount	Claim Status	Destination	Claim Type
2	123456789		03/07/2022	$255.00	04/01/2023	$85.00	Paid	Fee For Service	
2	123456789		03/07/2022	$205.00	02/01/2023	$75.00	Paid	Fee For Service	
2	123456789		03/07/2022	$255.00	04/02/2023	$95.00	Paid	Fee For Service	
2	123456789		03/07/2022	$290.00	05/01/2023	$95.00	Paid	Fee For Service	

Export to Excel Export to PDF Export All
1 2 3 ... 10 Items per page 1 - 10 of 146 items

Figure 69. Claim Search – Search Results Page

NOTE: *You can sort all columns in ascending or descending order and can filter by the Claim Status except for the expanded view. The Export To Excel and Export To PDF will only export information displayed in the results grid; this includes the expanded view. The Export All will download all information based on the search criteria entered. You can also select the number of items you want to be displayed per page i.e., 5, 10, or 20.*

8.1 View Claim Details

The **View Claim Details** page includes further details regarding the claim such as charge amounts, paid amounts, services provided, and explanation of benefit codes, etc.

1. To access the Claim Details page, double-click the returned line displayed in the search result grid.
2. The following pages are displayed, and each page is populated with information when the information exists and/or is appropriate for the claim service billed.

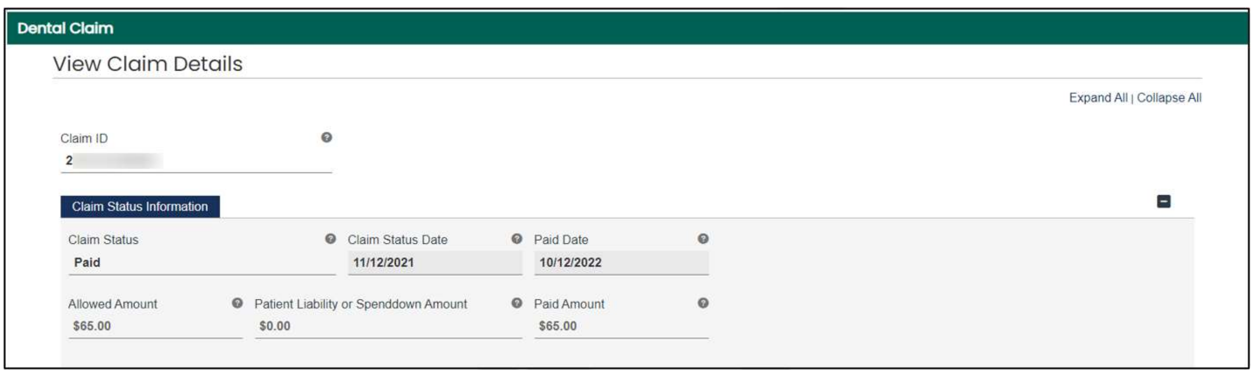
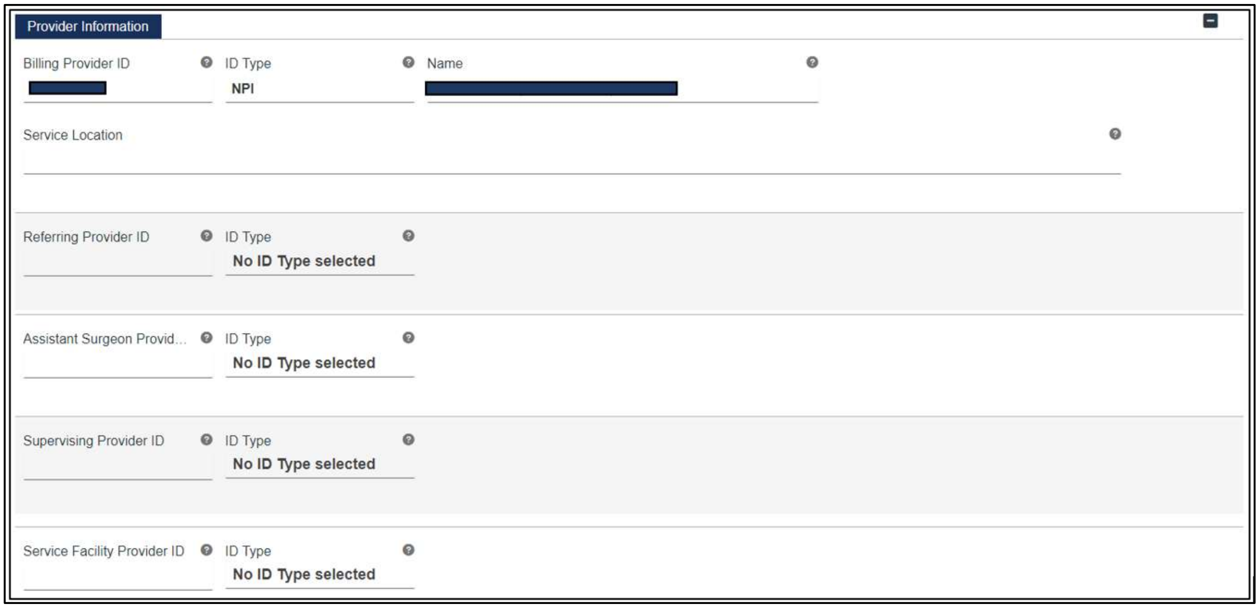


Figure 70. View Claim Detail Panels 1 of 10


Provider Information

Billing Provider ID: [redacted]
ID Type: NPI
Name: [redacted]

Service Location

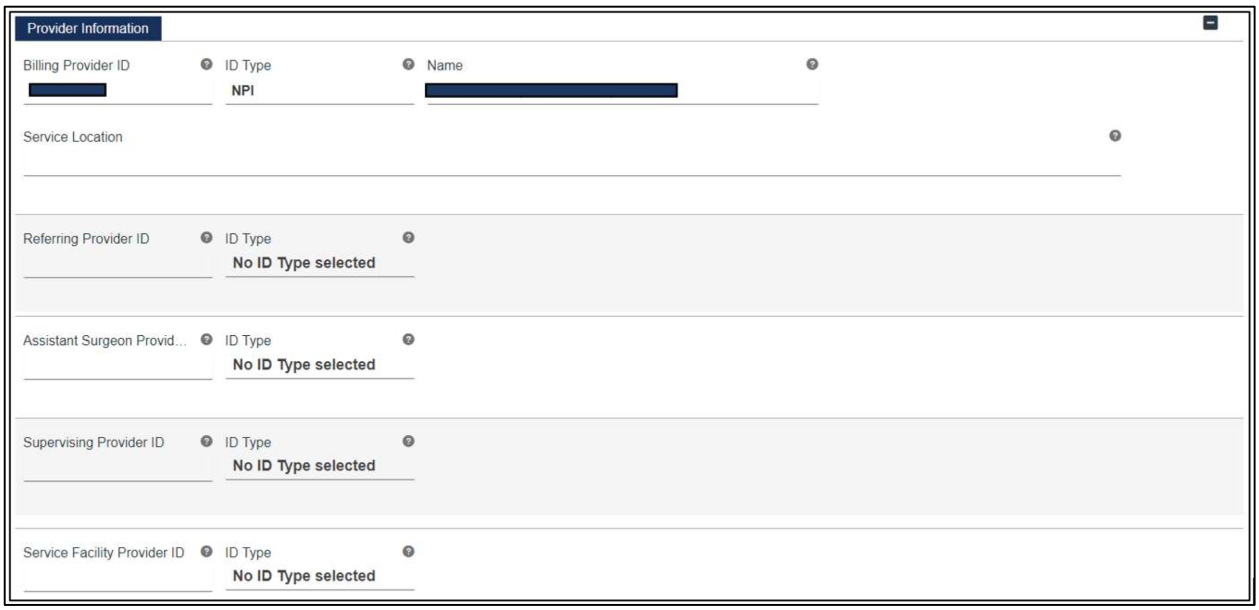
Referring Provider ID
ID Type: No ID Type selected

Assistant Surgeon Provid...
ID Type: No ID Type selected

Supervising Provider ID
ID Type: No ID Type selected

Service Facility Provider ID
ID Type: No ID Type selected

Figure 71. View Claim Detail Panels 2 of 10


Provider Information

Billing Provider ID: [redacted]
ID Type: NPI
Name: [redacted]

Service Location

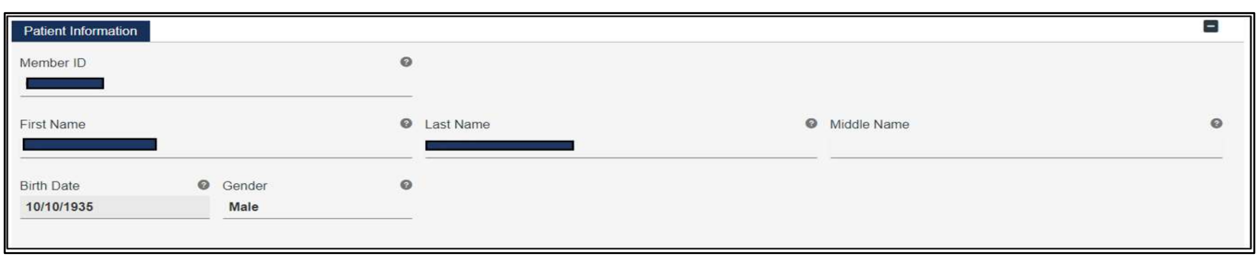
Referring Provider ID
ID Type: No ID Type selected

Assistant Surgeon Provid...
ID Type: No ID Type selected

Supervising Provider ID
ID Type: No ID Type selected

Service Facility Provider ID
ID Type: No ID Type selected

Figure 72. View Claim Detail Panels 3 of 10


Patient Information

Member ID: [redacted]

First Name: [redacted]
Last Name: [redacted]
Middle Name

Birth Date: 10/10/1935
Gender: Male

Figure 73. View Claim Detail Panels 4 of 10

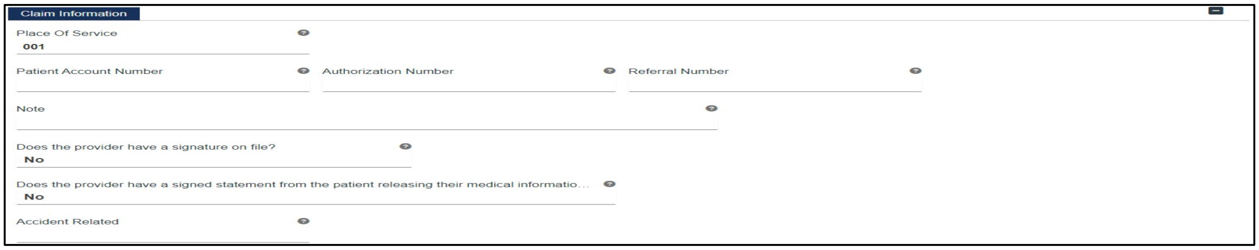


Figure 74. View Claim Detail Panels 5 of 10

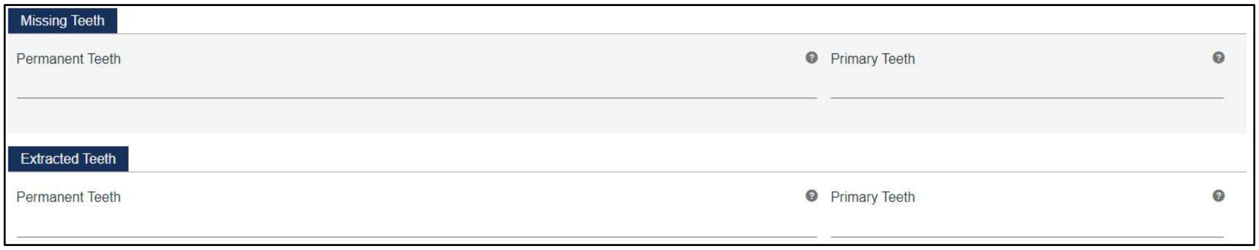


Figure 75. View Claim Detail Panels 6 of 10

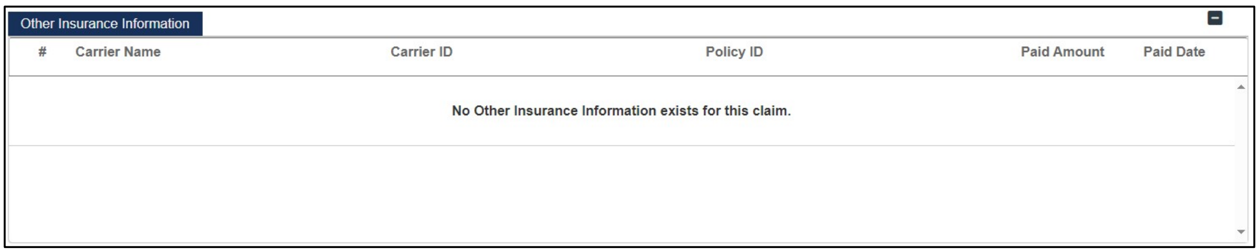


Figure 76. View Claim Detail Panels 7 of 10

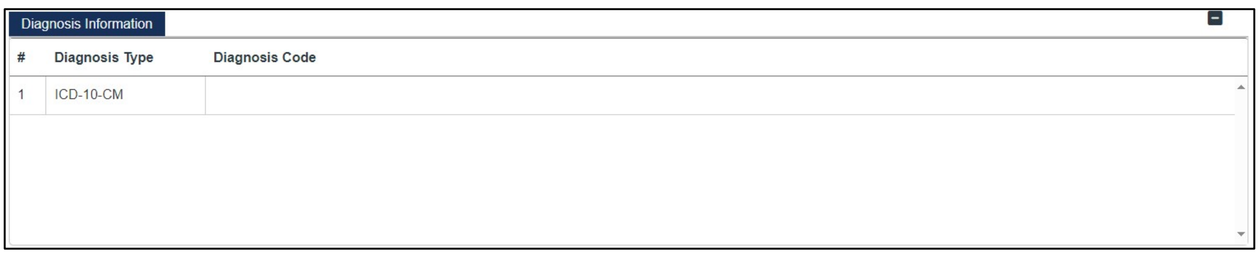


Figure 77. View Claim Detail Panels 8 of 10

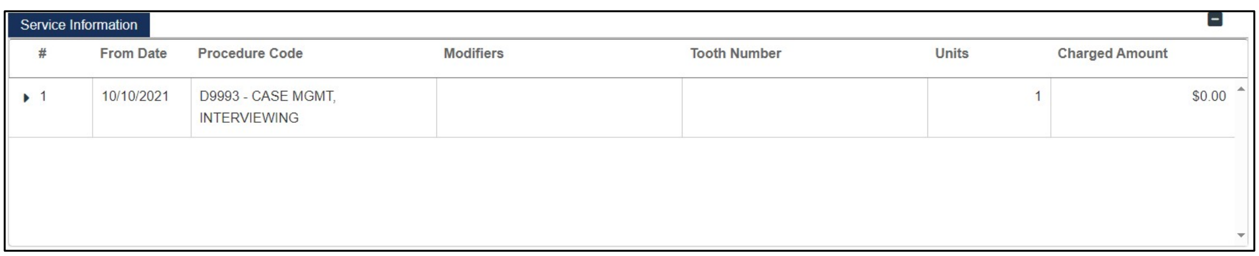


Figure 78. View Claim Detail Panels 9 of 10

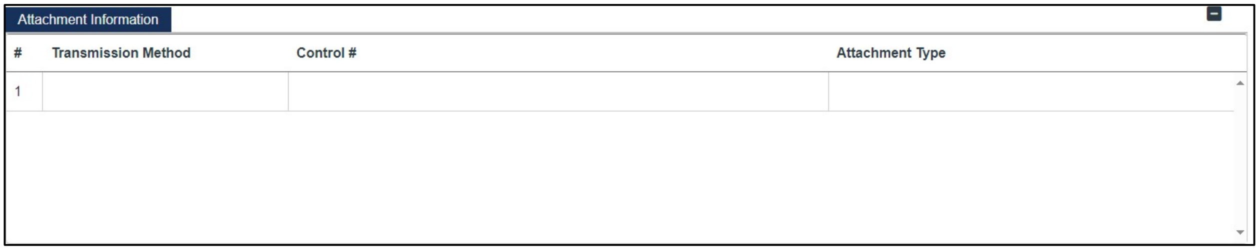


Figure 79. View Claim Detail Panels 10 of 10

3. Click **Print** to create a PDF version of the claim details.
4. Click **Back** to return to the original search page.

9 Search Payment History

This feature enables you to search for claim payments and view the details for payments.

1. Click the **Hamburger** icon on the home page.
2. Select or hover over the **Claims** menu option.
3. Select **Search Payment History** from the main menu:

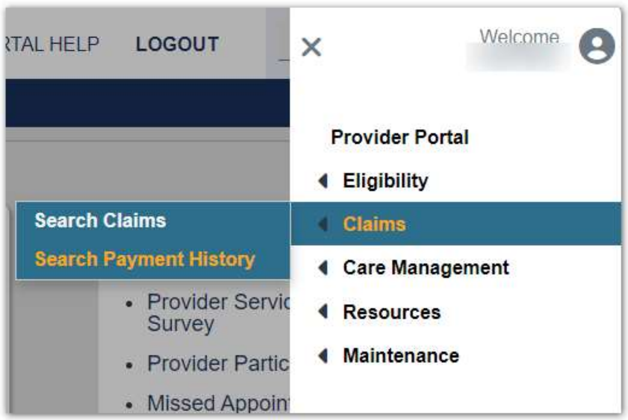


Figure 80. Provider Portal Home Page

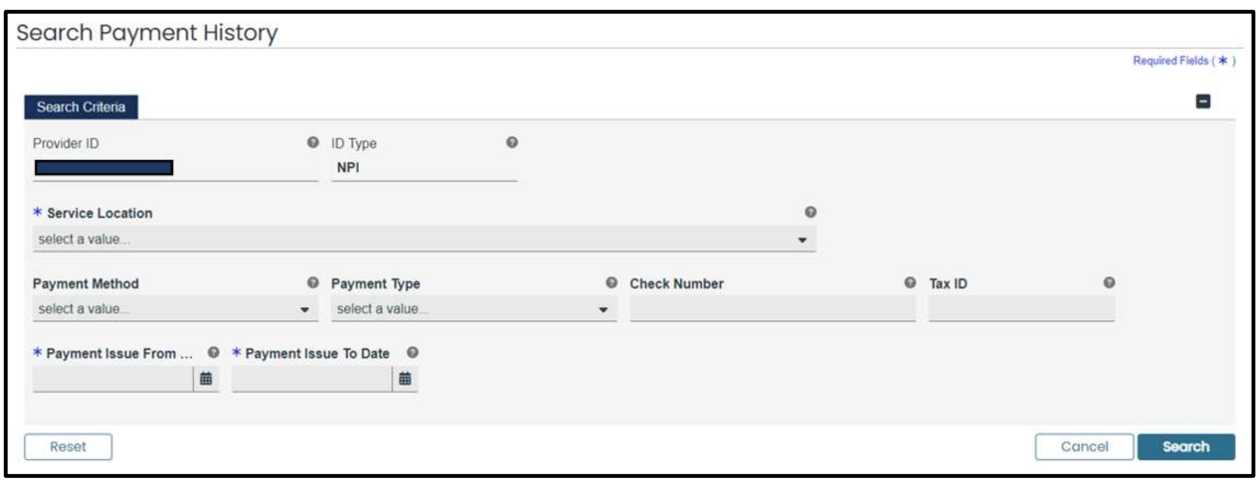


Figure 81. Search Payment History Home Page

NOTE: *The Provider ID, ID Type, and Service Location are automatically populated based on the Provider account that is logged into the Portal. Provider ID and ID Type are always read-only.*

The Service Location field is read-only with a default value if the Provider only has a single service location. The Drop-down menu is used to select the Service Location if the Provider has multiple service locations.

Search By **Values** include:

- Payment Method
- Payment Type
- Check Number
- Payment Issue from Date
- Payment Issue to Date

Click **Search** to display the following:

- Payment Issue Date
- Payment Method
- Payment Type
- Check Number
- Check Amount

NOTE: *You can sort the Payment Issue Date and Check Number columns in ascending or descending order. The Export to Excel and Export to PDF will only export information displayed in the results grid. You can also select the number of items you want to be displayed per page i.e., 5, 10, or 20.*

9.1 View Payment Details

The **View Payment Details** page includes further details regarding claim payments, such as payment summary for a check and claim payment details.

1. To access the Payment Details page, double-clicking a returned line displayed in the search result grid.

2. The following panels are displayed, and each panel is populated with information when the information exists and/or is appropriate for the claim payment type:

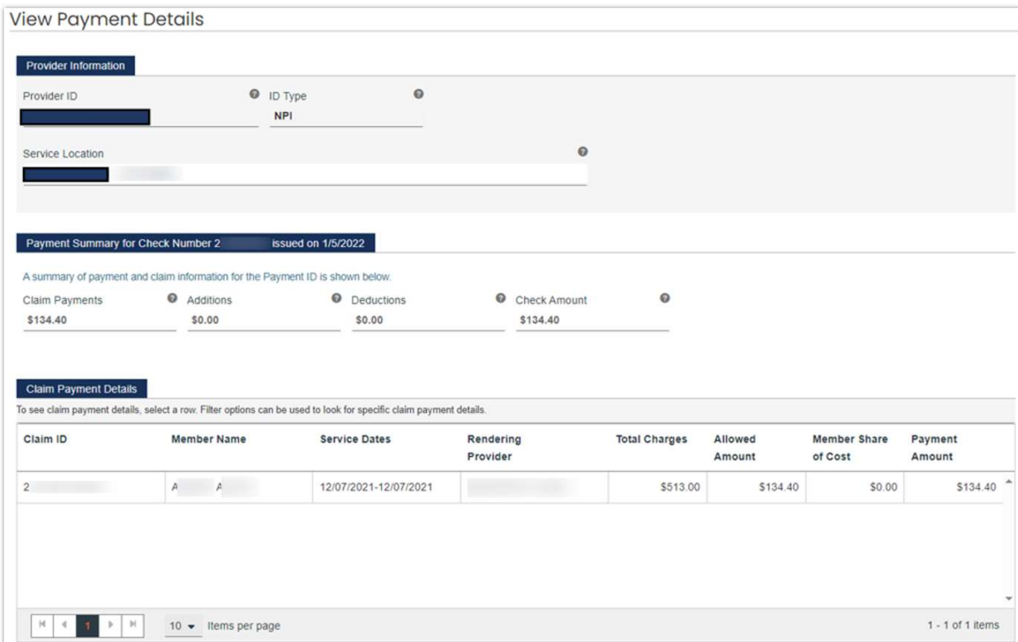


Figure 82. View Payment Details Page

NOTE: *The **Claim Payment Details** headers for each column may not render fully when viewing on some mobile devices. To fully view, click the **Expand** icon on each column to view the details.*

Android Mobile Device Example: You can tab (press for 4-5 seconds) on the specific column of the table to resize it.

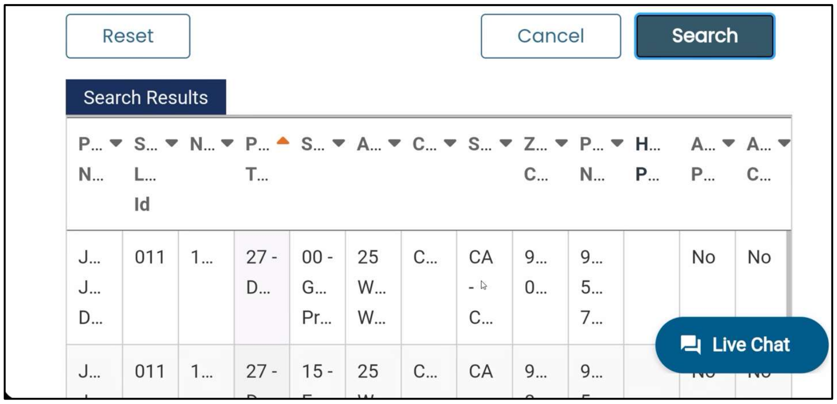


Figure 83. Before: Column collapsed

Figure 84. After: Column expanded

10 Care Management - Search Authorizations

This feature enables you to search for Treatment Authorized Requests (TARs) and determine your status.

1. Click the **Hamburger** icon on the home page
2. Select or hover over the **Care Management** menu option.
3. Select Search Authorizations from the main menu.

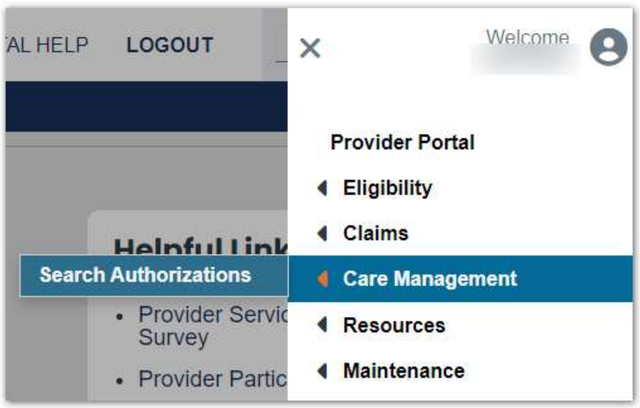


Figure 85. Provider Portal Home Page

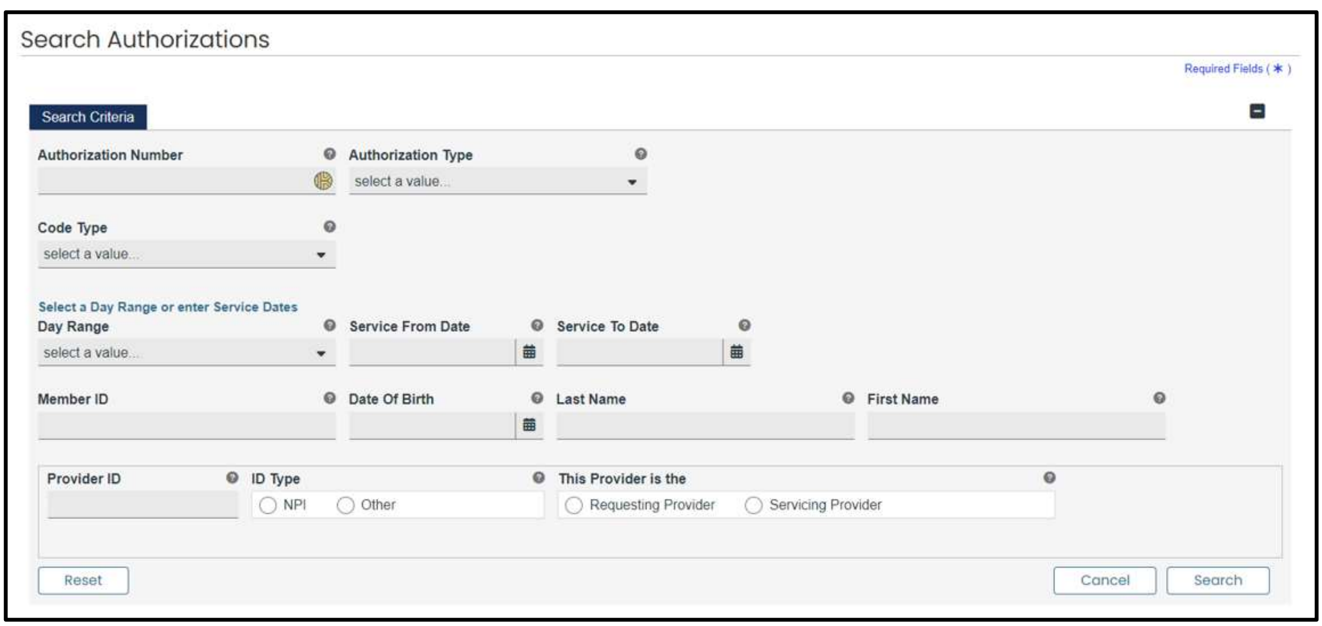


Figure 86. Search Authorizations Page

4. Enter at least one search criteria and click **Search**. Search criteria include:
    - Authorization Number
    - Authorization Type
    - Code Type and Procedure Code or Description
    - Day Range, Service from Date or Service to Date
    - Member ID, Birth Date, Last Name, and First Name
    - Provider ID and ID Type and whether the Provider is the Requesting or Servicing Provider.

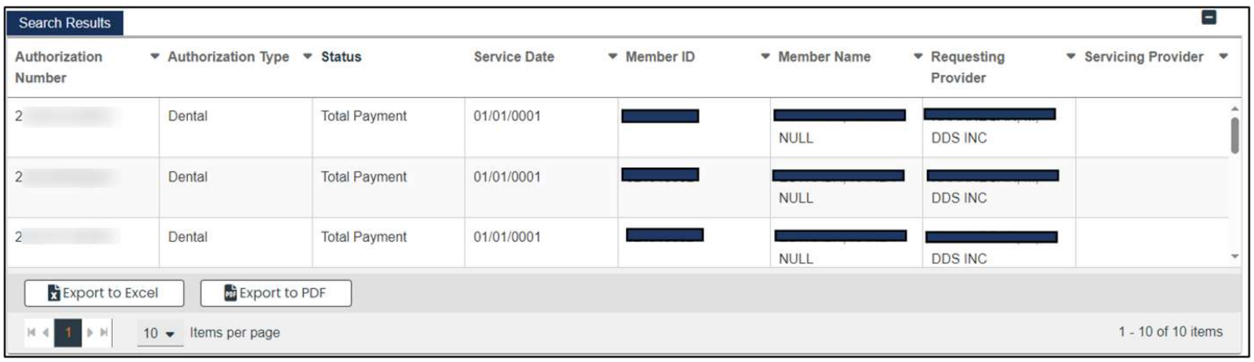


Figure 87. Search Authorization – Search Results

5. Double-click a TAR within the **Search Results** to view details.

NOTE: *You can sort columns in ascending or descending order. The Export to Excel and Export to PDF will only export information displayed in the results grid. You can also select the number of items you want to be displayed per page i.e., 5, 10, or 20.*

10.1 View Authorization Details

The **View Authorization Details** page includes further details regarding the TAR such as Procedure Codes and their status, etc.

1. To access the Authorization Details page, double-click a returned line displayed in the search result grid.
2. The following panels are displayed, and each panel is populated with information when the information exists and/or is appropriate for the TAR:

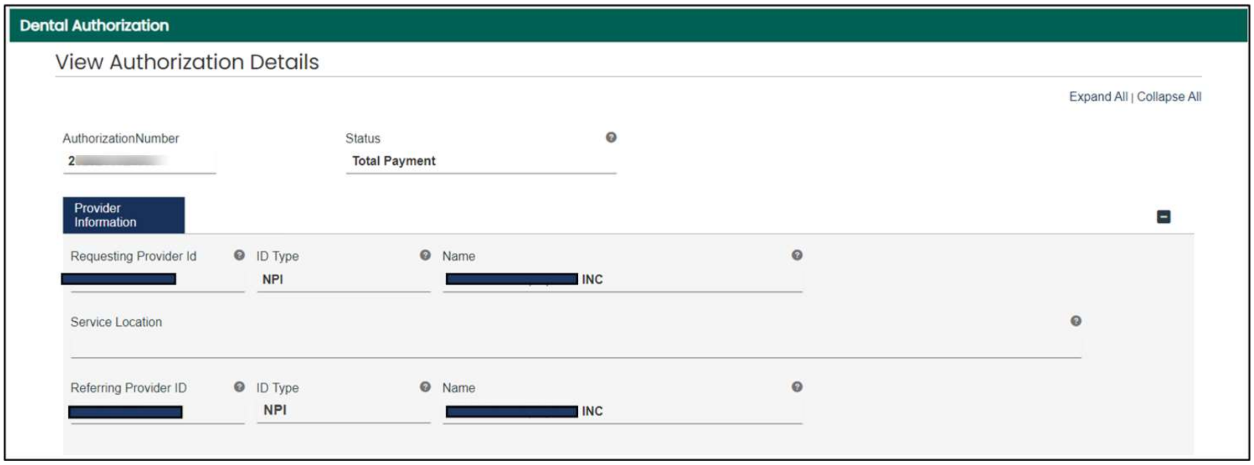


Figure 88. View Authorization Details Panels 1 of 8

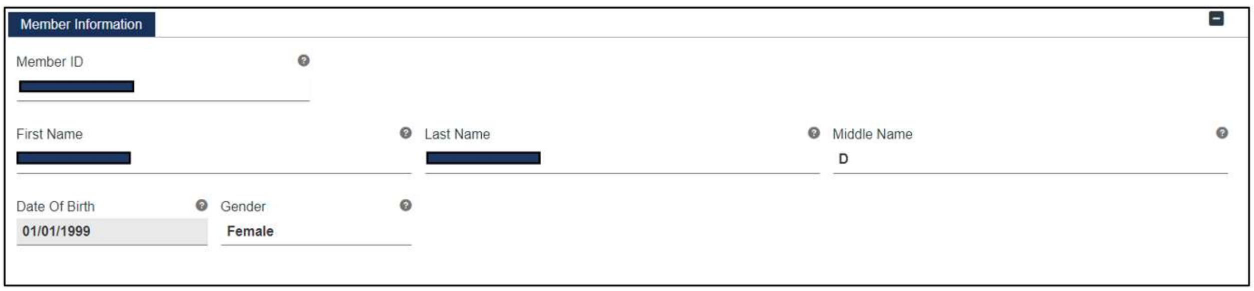


Figure 89. View Authorization Details Panels 2 of 8

Figure 90. View Authorization Details Panels 3 of 8

Figure 91. View Authorization Details Panels 4 of 8

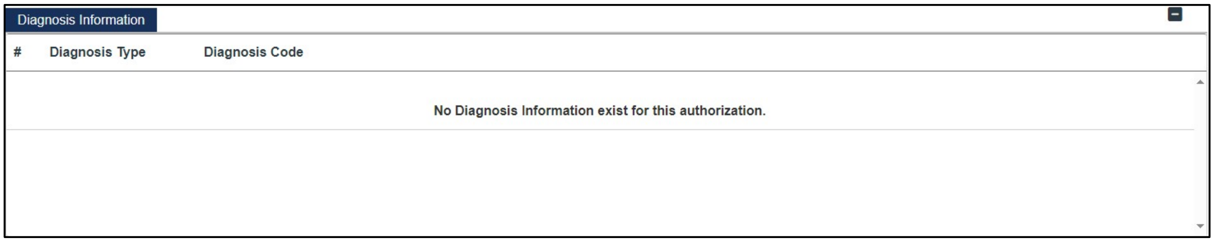


Figure 92. View Authorization Details Panels 5 of 8

Figure 93. View Authorization Details Panels 6 of 8

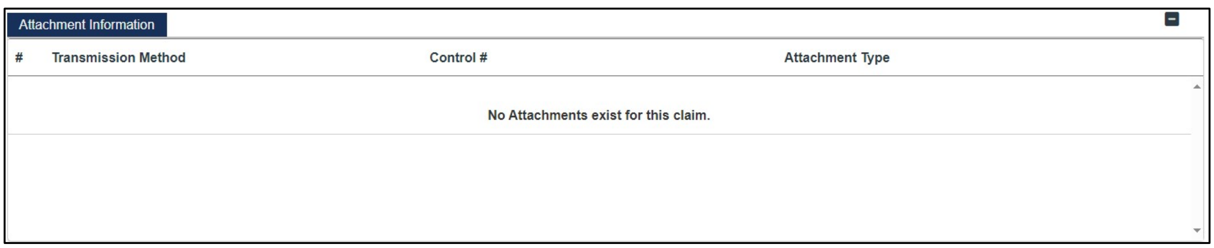


Figure 94. View Authorization Details Panels 7 of 8

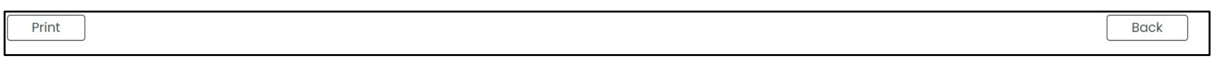


Figure 95. View Authorization Details Panels 8 of 8

3. Click **PRINT** to create a PDF version of the authorization details.
4. Click **Back** to return to the original search page.

11 Resources

11.1 Search Providers

This feature enables you to search the database for Providers enrolled in Medi-Cal Dental.

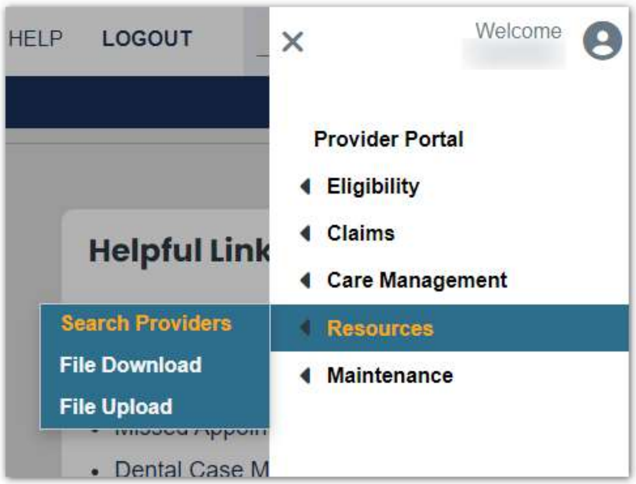


Figure 96. Provider Portal Home Page

1. Click the **Hamburger** icon on the home page
2. Select or hover over the **Resources** menu option.
3. Select **Search Providers** from the main menu. You can search by the following criteria:

- Primary Search:
    - Provider NPI
    - Individual Name
    - Business Name
- Additional Search:
    - Provider Type
    - Specialty
    - Health Plan
    - Address

- City
- State
- ZIP Code
- Gender
- Language
- ADA Compliant
- Accepting Patients

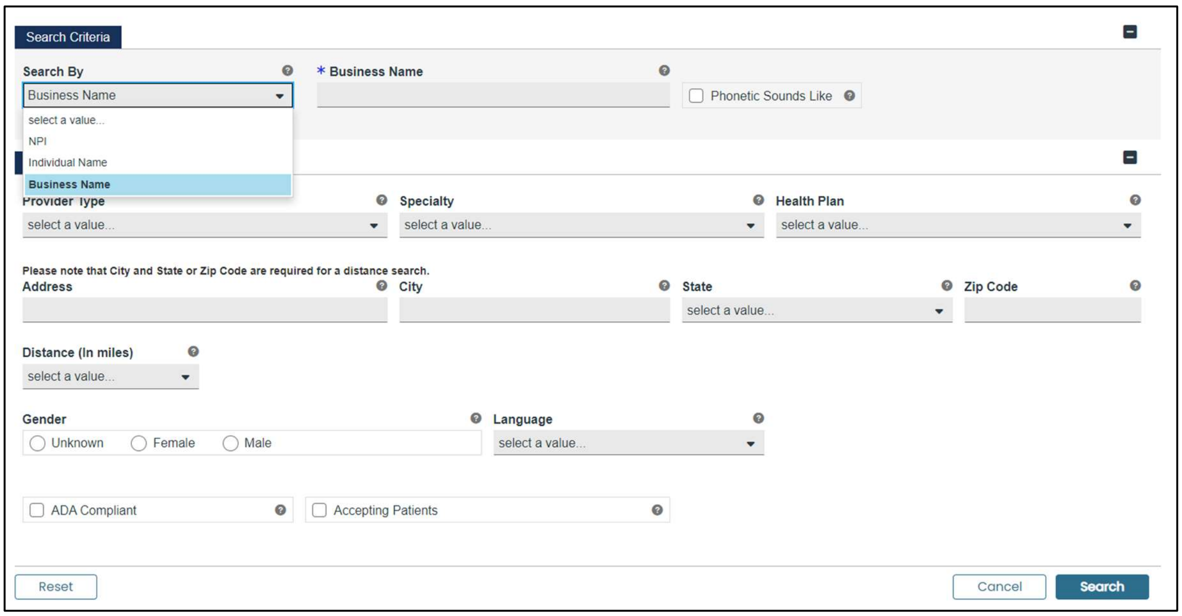


Figure 97. Search Providers – Search Criteria Page

11.2 Conduct a Search

1. Click the **Search By** Drop-down and select one of the following:
   - NPI
   - Individual Name (if selected, Last Name is required)
   - Business Name

NOTE: *If selecting Individual Name or Business Name for the Search By option, you may use the phonetic or wildcard feature.*

You can perform a phonetic search by selecting the **Phonetic Sounds Like** checkbox in the Provider's name fields. The display of the phonetic search checkbox is based on the configuration settings.

- If the **Individual Name** option is selected, a phonetic search can be done using the **Last Name** and **First Name** fields.
- If the **Business Name** option is selected, a phonetic search can be done using the **Business Name** field.
    - You can perform a wildcard search using an **asterisk** (**) in the Provider's name fields.

2. Click the **plus sign** (+) next to Additional Search Criteria to expand the Additional Search Criteria.
    - Zip Code or City and State is a required field when searching only by Additional Search Criteria.
3. Enter or select any Primary and/or Additional search criteria and click the **Search** button to display results.

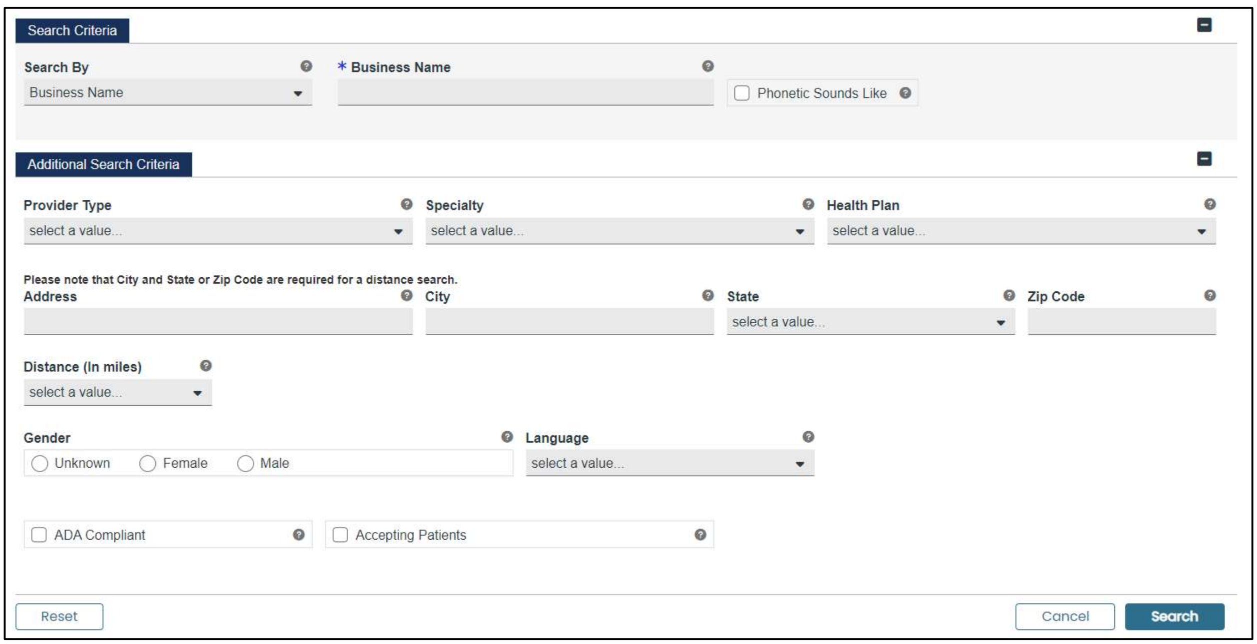
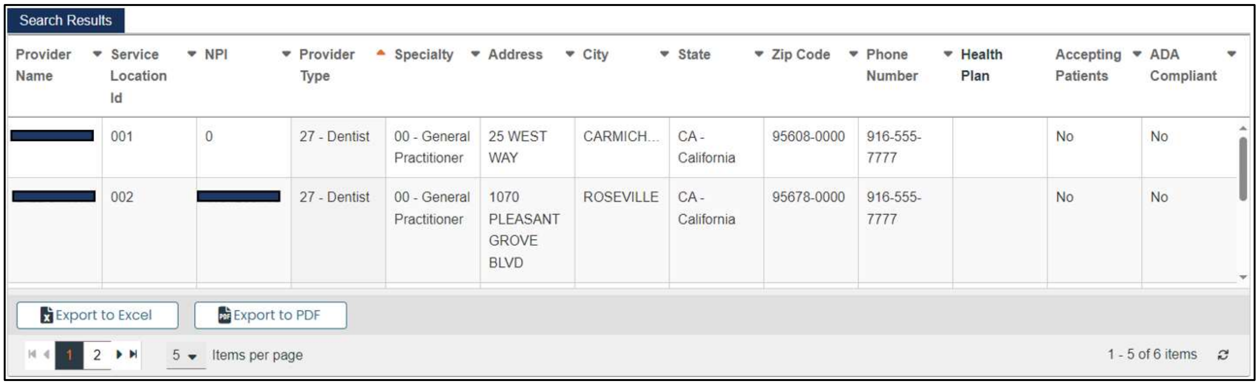


Figure 98. Search Providers – Search Criteria Page

The Search Providers – Search Results Page displays


Search Results

Provider Name	Service Location Id	NPI	Provider Type	Specialty	Address	City	State	Zip Code	Phone Number	Health Plan	Accepting Patients	ADA Compliant
[redacted]	001	0	27 - Dentist	00 - General Practitioner	25 WEST WAY	CARMICH...	CA - California	95608-0000	916-555-7777		No	No
[redacted]	002	[redacted]	27 - Dentist	00 - General Practitioner	1070 PLEASANT GROVE BLVD	ROSEVILLE	CA - California	95678-0000	916-555-7777		No	No

Figure 99. Search Providers – Search Results Page

4. Double-click a Provider within Search Results to view Provider details.

NOTE: *You can sort columns in ascending or descending order. The Export to Excel and Export to PDF will only export information displayed in the results grid. You can also select the number of items you want to be displayed per page i.e., 5, 10, or 20.*

11.3 View Provider Details

The **View Provider Details** page includes further details regarding the Provider such as the Provider Address, etc.

1. Double-click the returned line displayed in the search grid to access the **Provider Details** page.

The following View Provider Details panels display and populate with information when that information exists for the Provider.

2. Click the Map icon to view the driving directions to the Provider's address.

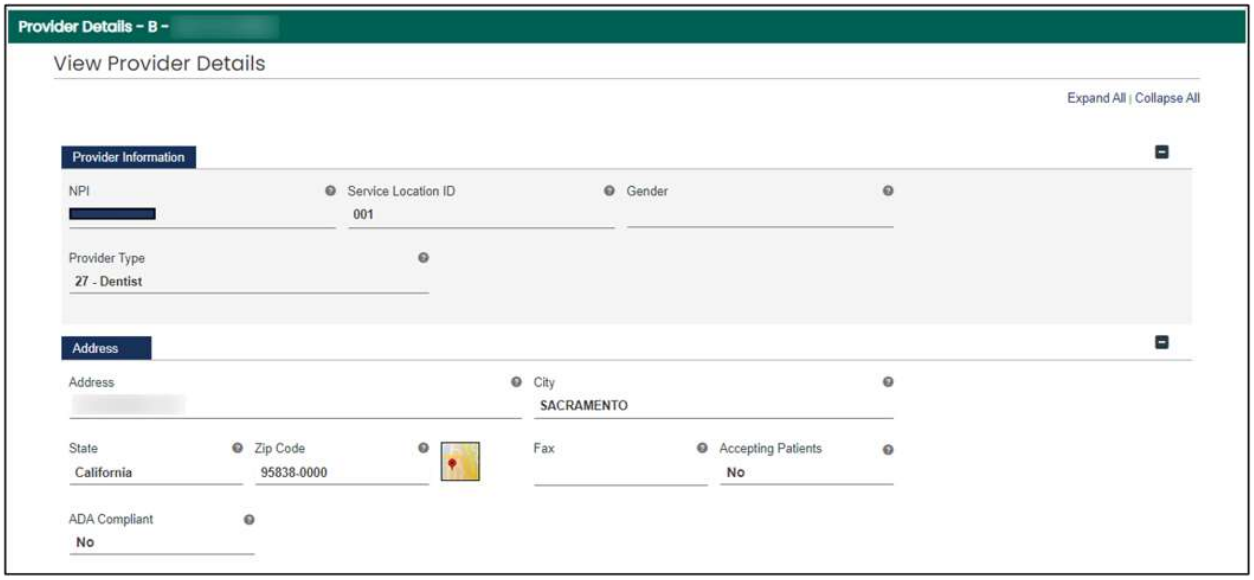


Figure 100. View Provider Details Panels 1 of 6

Figure 101. View Provider Details Panels 2 of 6

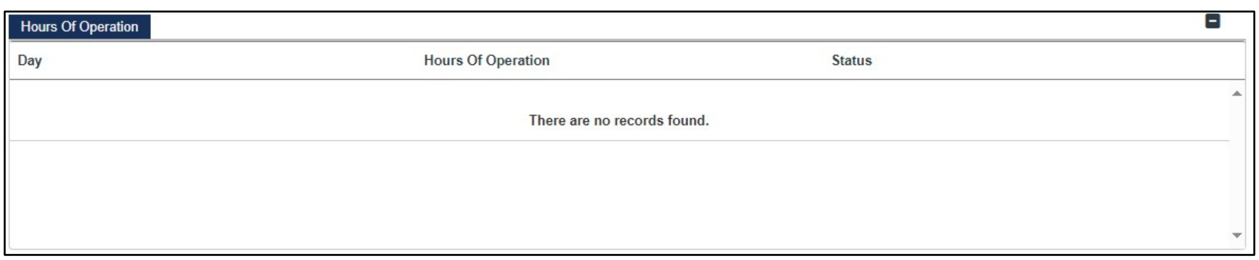


Figure 102. View Provider Details Panels 3 of 6

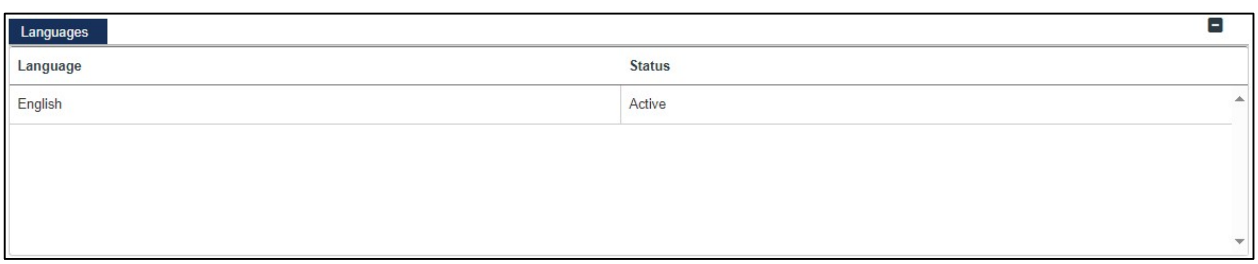
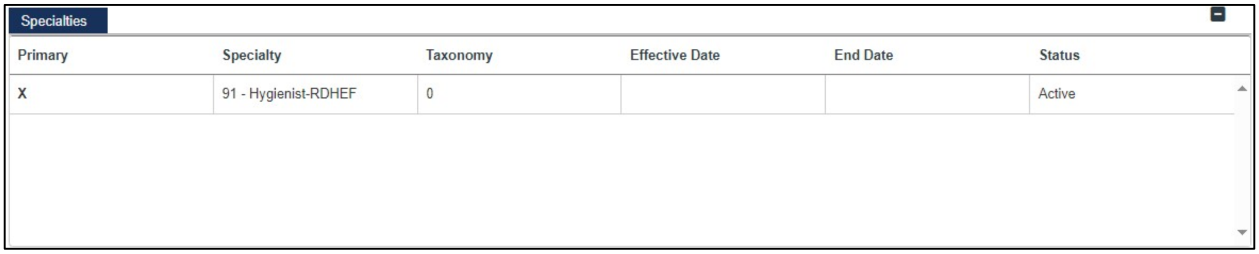


Figure 103. View Provider Details Panels 4 of 6



Specialties

Primary	Specialty	Taxonomy	Effective Date	End Date	Status
X	91 - Hygienist-RDHEF	0			Active

Figure 104. View Provider Details Panels 5 of 6

Figure 105. View Provider Details Panels 6 of 6

3. Click **Print** to create a PDF version of the claim details.
4. Click **Back** to return to the original search page.

11.4 File Upload

This feature allows you to upload files. Do not use this File Upload to upload Electronic Data Interchange (EDI) files or files required as attachments as part of updates made within Manage My Information. Acceptable file extensions are the following:

- PDF
- Excel
- Word
- PNG
- TXT

Uploading Files

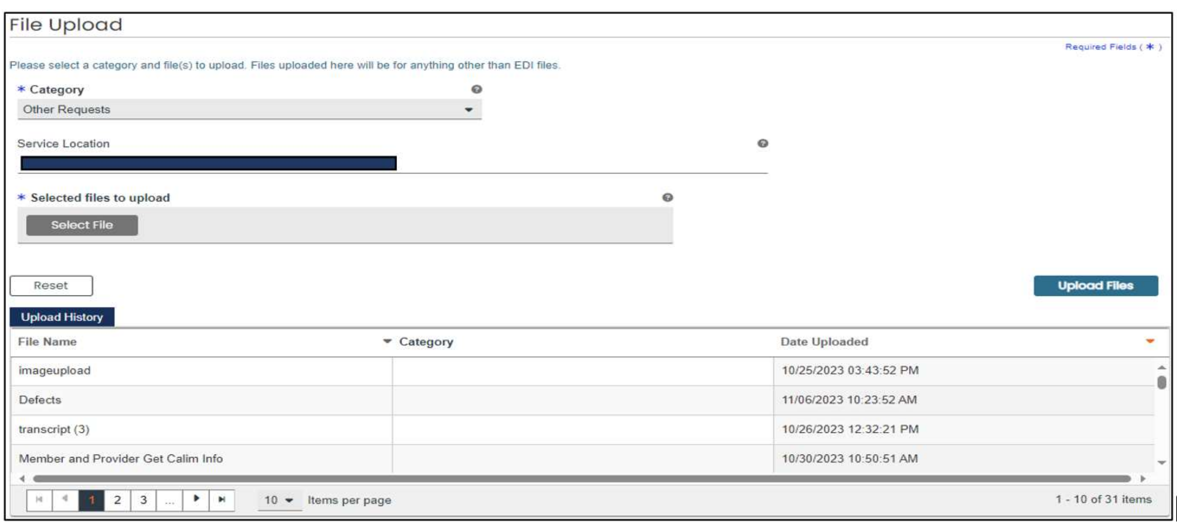


Figure 106. File Upload Page

1. Select a **Category** and **Service Location** (if necessary) from the drop-down.

   The Service Location field is read-only with a default value if the Provider only has a single service location. The drop-down menu is used to select the Service Location if the Provider has multiple service locations.

2. Click **Select File** to open the file manager.
3. Select a valid file to upload.
4. Click **Upload Files**.

NOTE: *If you are uploading multiple files for the same **Category**, continue Steps 3 and 4 until all files have been selected.*

11.5 File Download

You can download files from your Upload History, filter file selection criteria, and view available files to download. Files from Upload History can be searched and downloaded from this page. Files available to download are displayed in chronological order with the creation date and category.

Conducting a Search

1. Enter Search Criteria
2. Click the **Search** button to display results (File Name, Created Date, and Category).

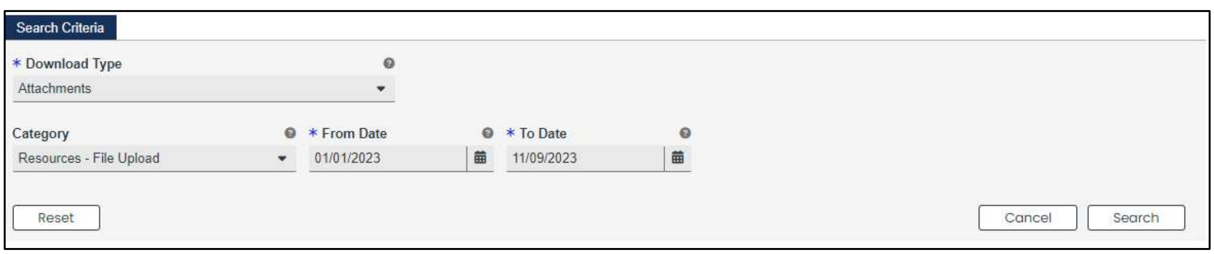


Figure 107. File Download – Search Criteria

Search Results

Figure 108. File Download – Search Results

3. Double-click the **File Name** to download and view a file.

12 Maintenance

12.1 Profile Maintenance

This page allows you to view and update the account's personal profile information, such as Contact Information, Language Preferences, and Change Password.

1. Click the **Hamburger** icon on the home page and select or hover over the **My Account** menu option.
2. Select **Profile Maintenance** from the main menu.

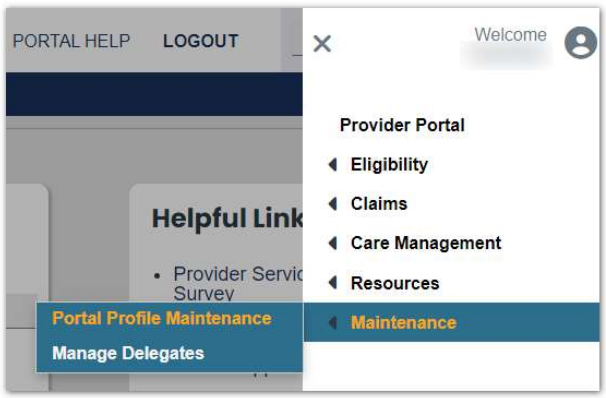


Figure 109. Provider Portal Home Page

12.2 Update Contact Information

1. To update the information, click the **Edit** button at the bottom right of the page. This enables all fields on the **Contact Information** page to become editable.
2. First Name
    - Middle Name
    - Last Name
    - Display Name
    - Phone Number
    - Current Email Address
    - Birth Date
    - Last 4 digits of Payment ID or SSN

- Primary Language

NOTE: *The information on this page is only regarding your Provider Portal account. Updating contact information here will not update the Provider's Medi-Cal Dental file. Providers must contact their county office to make changes to their file.*

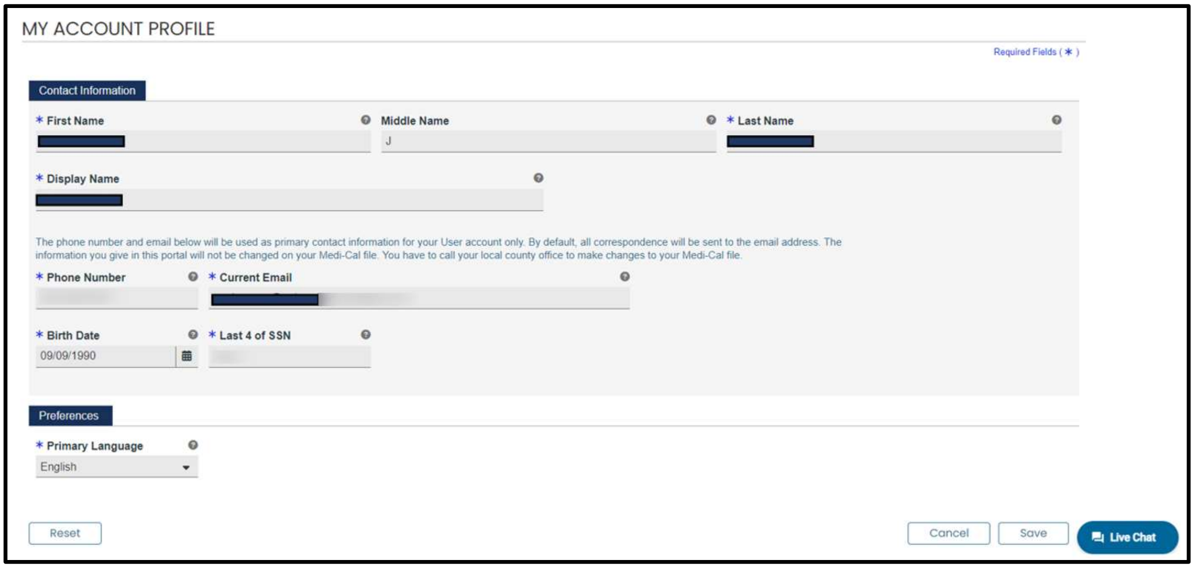


Figure 110. My Account Profile Non-Edit Mode Page

3. Click the **Save** button at the bottom of the page to update the Portal profile information.

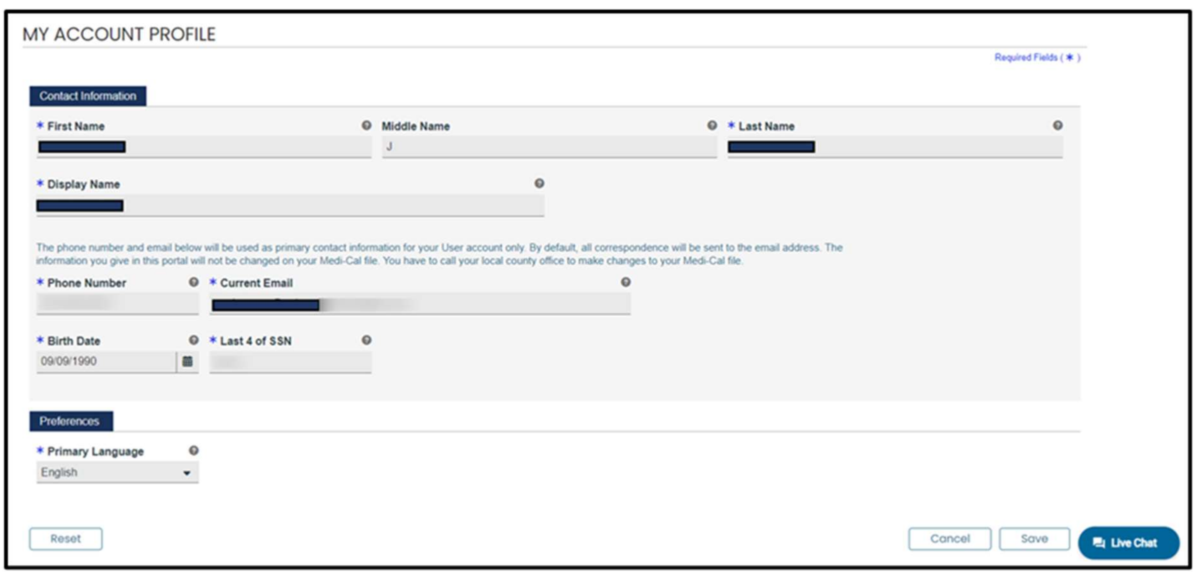


Figure 111. My Account Profile Edit Mode Page

13 Managing Delegates as a Provider/ Delegate Administrator

The Manage Delegates feature enables you to create a list of Delegates who may work on the Provider's behalf in the Provider Portal. The intention is to allow Providers to give Provider Portal access to their clerical or administrative staff. Delegates perform functions in the Provider Portal that are assigned by the Provider they represent.

The Manage Delegates feature can be made available to the Delegate Administrator (DA) by the Provider. A Delegate Administrator can create a Delegate to work on behalf of the Provider and service location on whose behalf the DA is working. However, a DA cannot create or update the rights for other Delegate Administrators.

Delegate Administrators can access all functions available to the Provider they represent. This includes creating other Delegates who work on behalf of the Provider they represent.

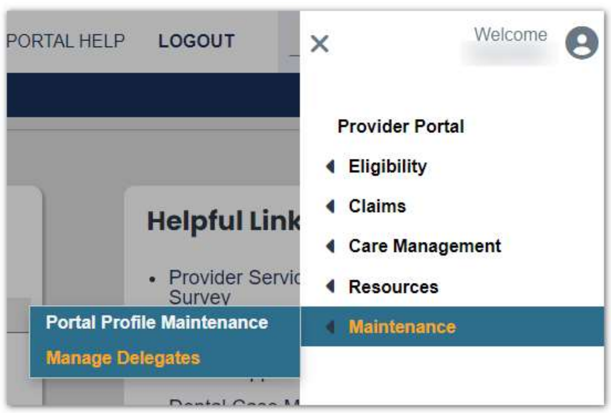


Figure 112. Provider Portal Home Page

1. Click the **Hamburger** icon on the home page and select or hover over the **Maintenance** menu option.
2. Select **Managed Delegates** from the main menu.
    - Name
    - Email Address
    - Relationship Code
    - Delegate Status (Active/Inactive)
    - Service Location Association Status (Active/Inactive)
    - Delegate Administrator (Yes/No)

- Delegate Information
  - Registered Delegates are displayed on the Registered tab.
  - Unregistered Delegates are displayed on the Pending tab.

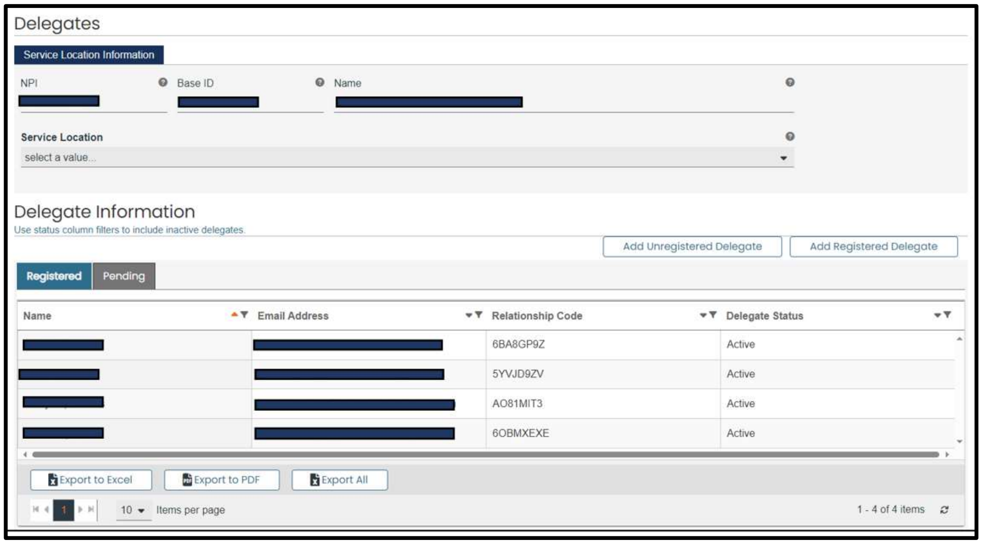


Figure 113. Delegate Page

Select a service location, if applicable, to reduce the results list to the Delegates only assigned to that location. All columns in the search results are sortable and filterable.

13.1 Adding Registered Delegates

This feature enables you to add a Delegate who is not currently associated with the Provider. An active Delegate must be assigned one or more security functions for active locations.

1. Click **Add Registered Delegate** to add a Delegate that already has an established account with the system.
2. The Delegate needs to provide their last name and relationship code to the Provider for them to receive the rights to work on the primary Provider’s behalf.

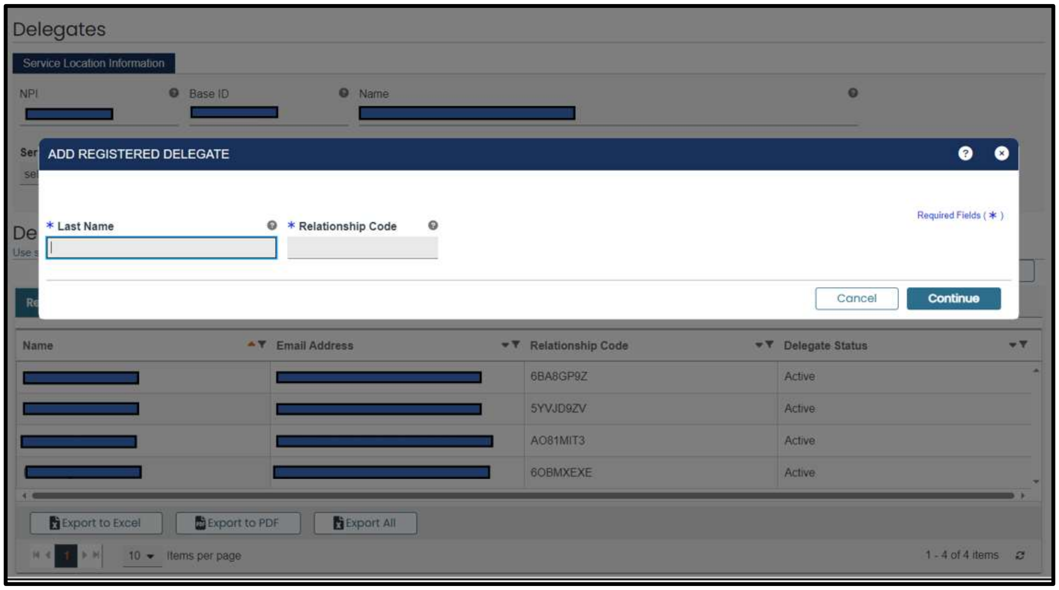


Figure 114. Add Registered Delegate Page

3. Enter the Delegate's last name and relationship code and click the **Continue** button.

When the last name and relationship code are validated, the **Add Registered Delegate** page displays the validated Delegate's information.

The Active check box indicates the Delegate's status related to the primary Provider.

Choose one of the following:

4. Select the **Active** check box if the Delegate works on the primary Provider's behalf. This updates the account to indicate the Delegate represents the organization. When Active Delegates log in, they can access the organization's information and represent that organization on the Provider Portal.
5. Deselect the **Active** check box if the Delegate will not work on the primary Provider's behalf. This updates the account to indicate the Delegate no longer represents that organization. When inactive Delegates log in, they cannot access the organization's information or represent that organization on the Provider Portal.

13.2 Selecting Service Locations and Security Functions

When selected, the Delegate receives only some of the Provider's security functions for specific service locations the Provider has selected. If the **DA** check box is selected, the Delegate receives all security functions for the specific service location selected.

The Active service location check box indicates the Delegate's status related to the specific service location.

The **DA** check box indicates that the Delegate should be a Delegate Administrator (DA) for the specific service location and is given all security functions for the specified service location as a DA. This includes the ability to add and maintain Delegates.

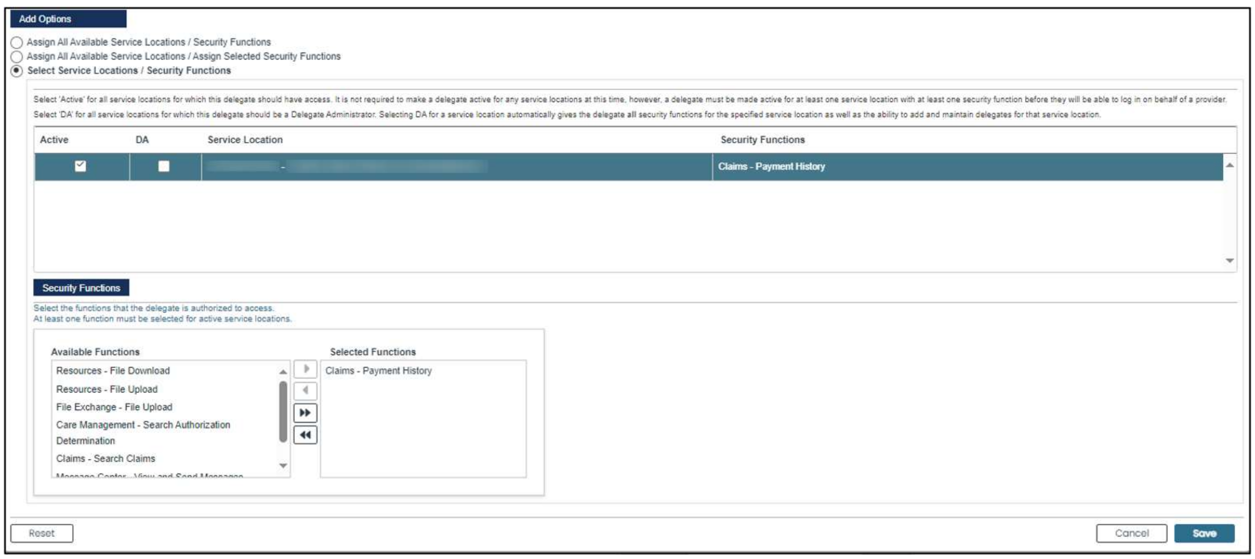


Figure 115. Assign Delegate - Select Service Location/Security Functions Page

Choose one of the following:

6. Select the **Active** check box if the Delegate works on behalf of this service location. When Delegates log in, they can access information for this location.
7. De-select the **Active** check box if the Delegate will not work on behalf of this service location. When Delegates log in, they cannot access information for this specific location on the Provider Portal.
8. Select the **DA** check box if the Delegate is a Delegated Administrator for this service location. The Security Functions section will be hidden because a Delegated Administrator will be given all security functions.

9. Deselect the **DA** check box if the Delegate will not be a Delegated Administrator for this service location.
10. Click **Available Functions** and click **Add** (> or >>) to move the function to **Selected Functions**. This assigns security functions to this Delegate.
11. Click a **Selected Function** and click **Add** (< or <<) to move the function to **Available Functions**. This removes security functions for this Delegate.
12. At least one security function must be selected for an Active Delegate and Active service location.

NOTE: *To learn more about which security rights are associated with a specific function, hover over the function name in the* **Available Functions** *or* **Selected Functions** *box.*

13.3 Assigning All Service Locations and Assigning Selected Security Functions

When selected, the Delegate receives only some of the Provider's security functions for all their service locations.

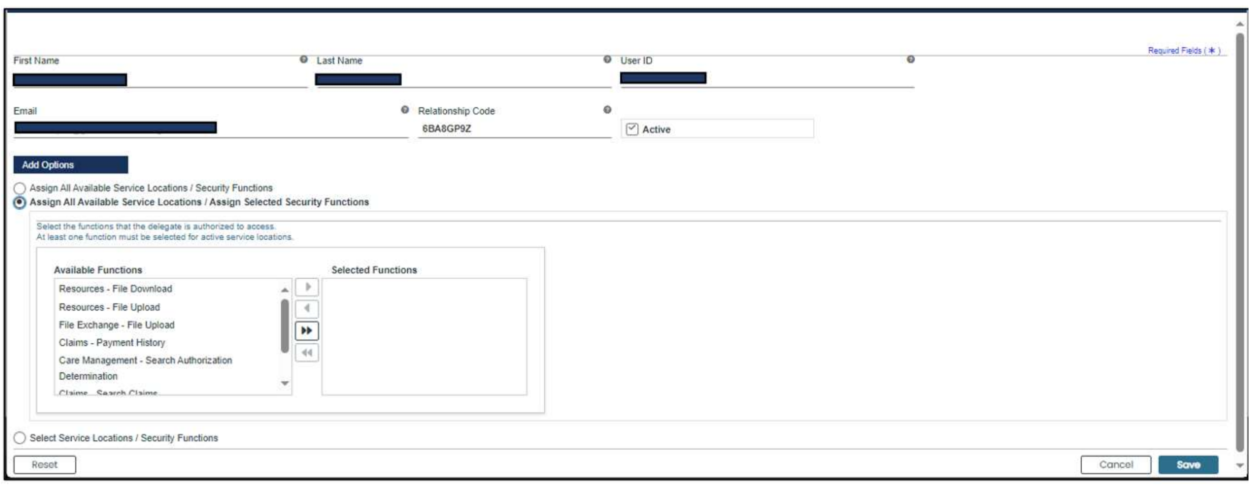


Figure 116. Assign Delegate - All available Service Location/Assign Selected Security Functions Page

1. Click an item in **Available Functions**, then click **Add** (> or >>) to move the function to **Selected Functions**. This assigns security functions to this Delegate.
2. Click a **Selected Function**, then click **Add** (< or <<) to move the function to **Available Functions**. This removes security functions for this Delegate.

At least one security function must be selected for an Active Delegate.

13.4 Assigning All Service Locations and Security Functions

When selected, the Delegate receives all the Provider's security functions for all their service locations.

If the **Delegate Administrator** check box is selected, the Delegate is assigned as a DA for all the Provider's service locations. As a DA, the Delegate has access to all security functions, including the ability to add and maintain Delegates.

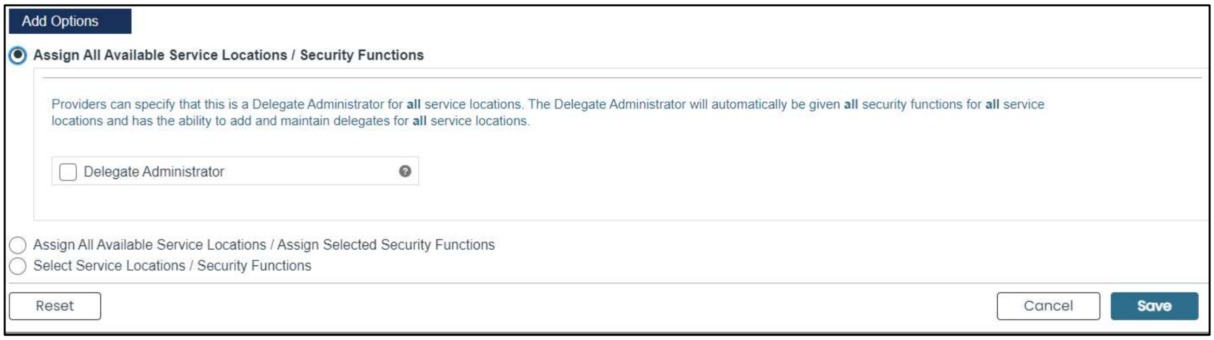


Figure 117. Assign Delegate - All Available Service Location/Security Functions Page

1. Select the **Delegate Administrator** check box if the Delegate will be a Delegated Administrator for all service locations.
2. De-select the **Delegate Administrator** check box if the Delegate will not be a Delegated Administrator for all service locations.

13.5 Adding Unregistered Delegates

This feature enables you to add a Delegate who is not currently associated with the Provider and does not currently have an account with the system. As with registered Delegates, a new Delegate must be assigned one or more security functions for active locations.

1. Click **Add Unregistered Delegate** to add a new Delegate who does not have an established account with the system.

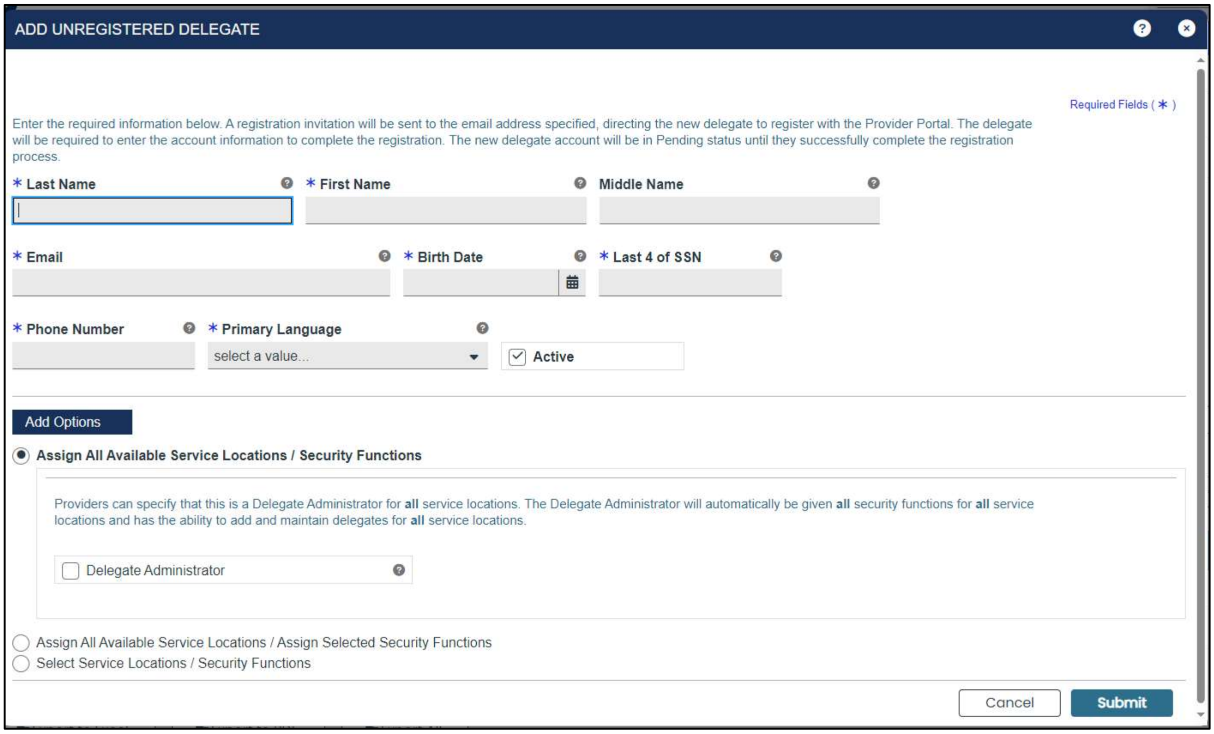


Figure 118. Add Unregistered Delegate Page

2. Enter the following required fields:
   - Last Name
   - First Name
   - Email
   - Birth Date
   - Last 4 digits of SSN
   - Phone Number
   - Primary Language

NOTE: *The information in Last Name, Email Address, Birth Date, and Last 4 digits of SSN will be used by the Delegate to register with the system.*

3. Complete the remainder of the page using the **Add Options** instructions as described in the sections above.
4. Click **Submit** to save the Delegate information and initiate an invitation to register that is sent to the email address entered above.
   a. If a Delegate didn't get the invitation, click the Envelope  icon to resend an invitation.

The **Unregistered Delegate** is listed on the **Pending** tab until they successfully register with the system. Upon successful registration, the Delegate moves to the **Registered** tab.

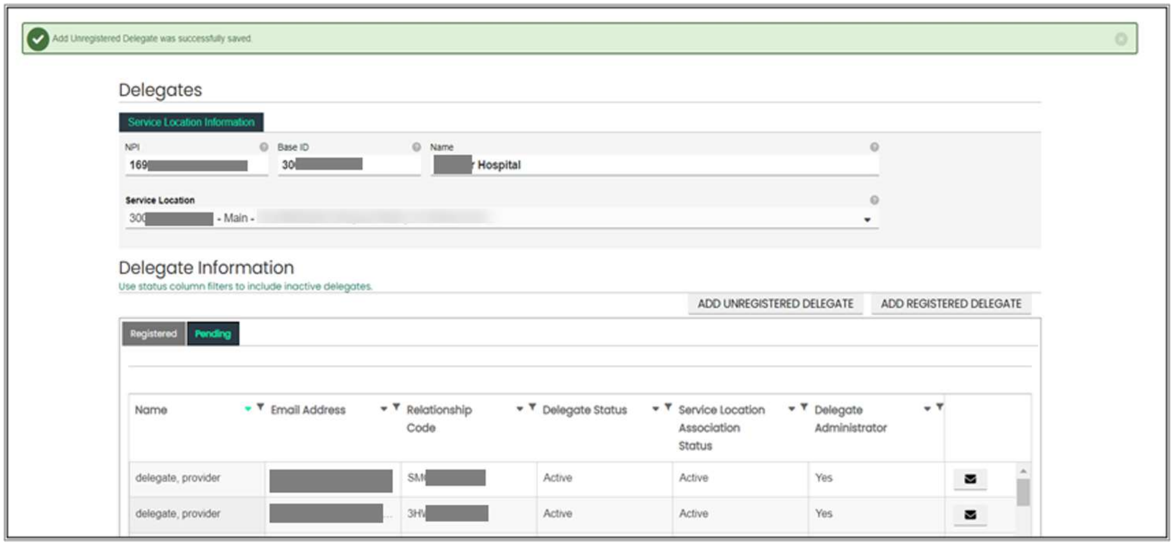


Figure 119. Add Unregistered Delegate Successfully Saved Page

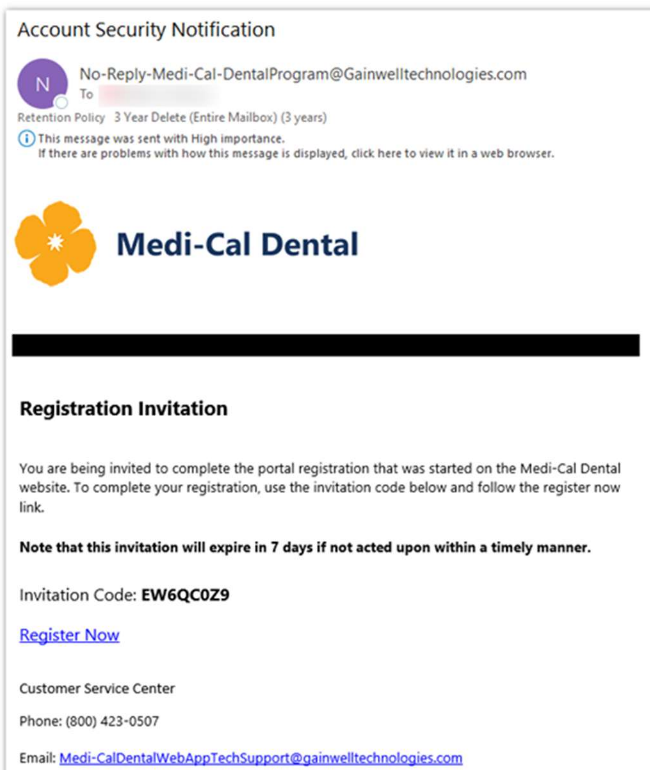


Figure 120. Registered Invitation Email Page

NOTE: *To complete the registration process, follow the instructions detailed in this guide, Section 2, Provider Portal Account Registration Process.*

13.6 Manage Registered or Pending Delegates

This feature enables you to activate or inactivate a Delegate on behalf of the Provider and service location on whose behalf they are working. You can also add and remove functions the Delegate may perform on behalf of the Provider and service location.

1. Double-click a **Delegate** row on the **Manage Delegates** page to view details on the **Assign Delegate** page. The Delegate level **Active** check box indicates the Delegate's status related to the Provider whose behalf they are working.

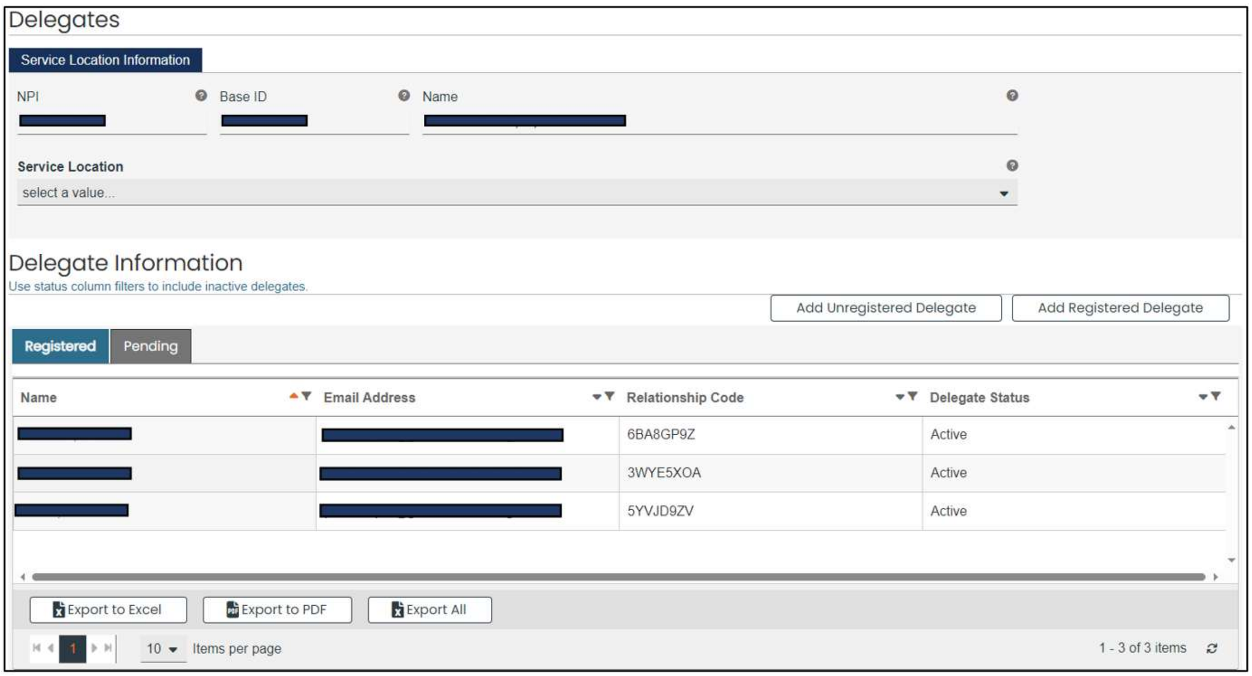


Figure 121. Delegates Page – Manage Delegates

2. Do one of the following.
   - Select the **Active** check box if the Delegate works on the Provider's behalf. When active Delegates log in, they may access the Provider's information and represent that Provider on the Provider Portal.
   - De-select the **Active** check box if the Delegate will not work on the Provider's behalf. When inactive Delegates log in, they cannot access the Provider's information or represent that Provider.

The service location **Active** check box indicates the Delegate's status related to the specific service location.

3. Choose one of the following:

  - Select the **Active** check box if the Delegate works on behalf of this service location. When Delegates log in, they can access information for this specific location on the Provider Portal.

  - De-select the **Active** check box if the Delegate will not work on behalf of this service location. When Delegates log in, they cannot access information for this specific location on the Provider Portal.

4. Click an **Available Function** and click **Add** (> or >>) to move the function to the **Selected Functions** box. This assigns security functions to this Delegate,

5. Click a **Selected Function** and click **Add** (< or <<) to move the function to the **Available Functions** box. This removes security functions from this Delegate.

6. Click the **Submit** button to save the Delegate information.

NOTE: *You must select at least one security function for Active Delegates and the service location*.

13.7 Switch Providers

This feature allows Delegates to select the Provider and service location for which they will work on behalf of. When a Delegate has been assigned to more than one Provider and/or more than one service location, the **Switch Provider** page displays upon logging in. After the Delegate selects a Provider and service location, they are given access to Provider Portal functions the Provider or Delegate Administrator has selected. For Delegates with multiple Providers and/or multiple service locations, the Switch Provider feature allows the Delegate to switch between Providers or service locations without logging off the Portal.

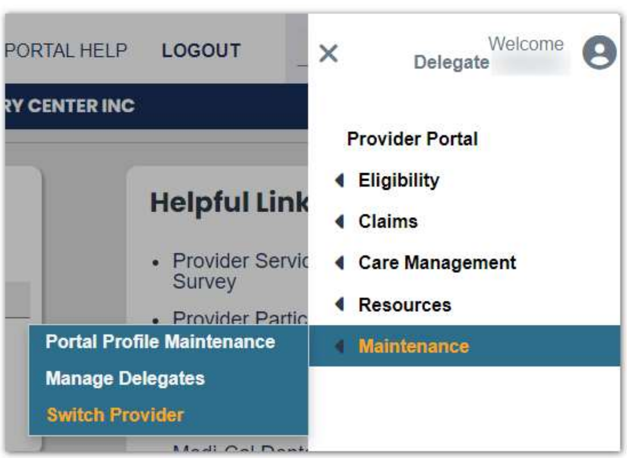


Figure 122. Main Menu

1. Click the **Hamburger** icon on the home page.
2. Select or hover over the **Maintenance** menu option.
3. Select **Switch Provider** from the main menu.

The **Switch Provider** page will display upon logging in.

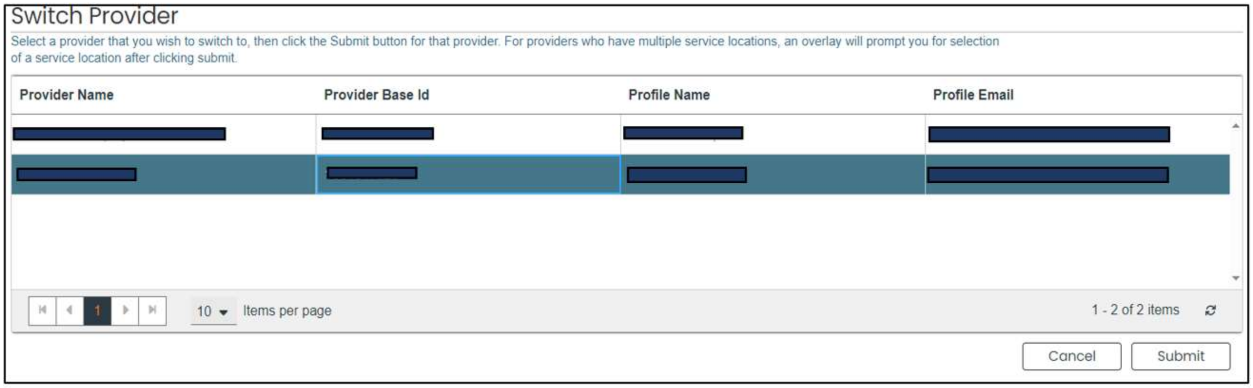


Figure 123. Switch Provider Work on Behalf

4. Select the desired Provider to work on behalf of and click **Submit**.
5. Select the desired **Service Location**. Only the active service locations the Provider is assigned to appear in Switch Provider Details.

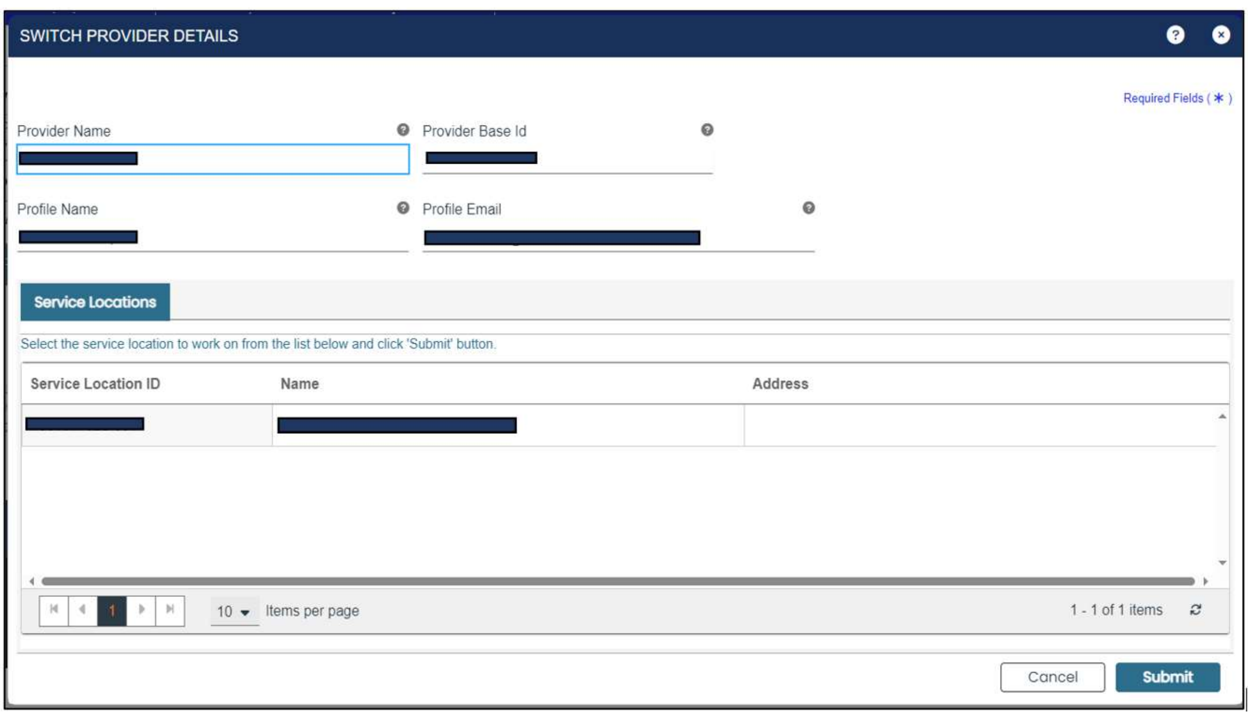


Figure 124. Switch Provider Details

NOTE: *If the Delegate is assigned only one service location for the selected Provider, the* ***Provider Portal Home Page*** *will display. If the Delegate is assigned more than one service location for the selected Provider, the* ***Switch Provider Details*** *page will display.*

6. Click the **Submit** button to navigate to the **Provider Portal Home Page**.

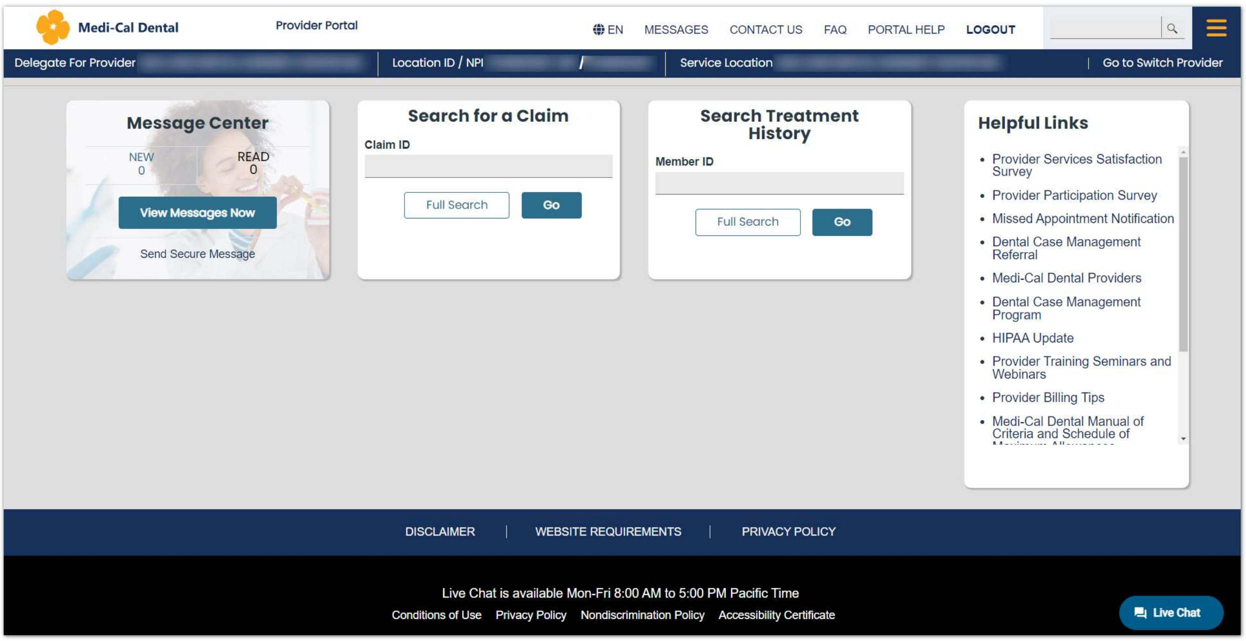


Figure 125. Provider Portal Home Page

You can log out of the Portal by clicking the **Logout** link located in the top right section of the page.

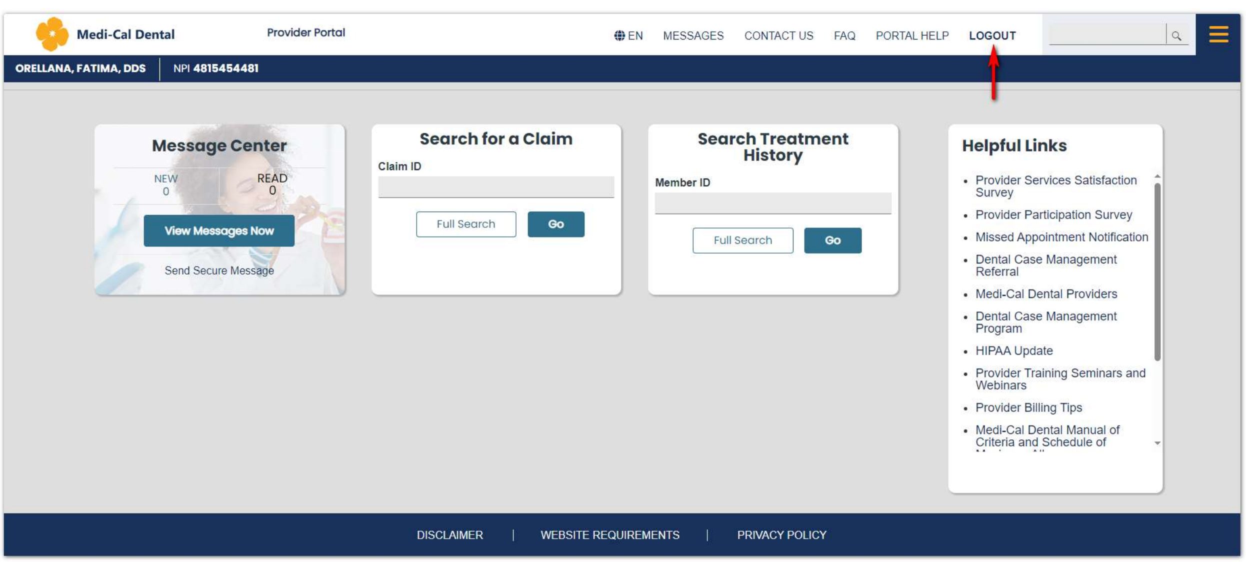


Figure 126. Logout of Provider Portal

14 Revision History

Version #	Date of Publication	Pages Affected	Description of Change	Reason for Change	DHCS Approver
1.0	xx/xx/xxxx	All	Document Creation	New Process	X. Xxxx

Appendix (Table of Figures)