Updating Provider Information in the Provider Portal

Quick Reference Guide

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Note: This guide is intended for Providers with an existing Provider Portal account.

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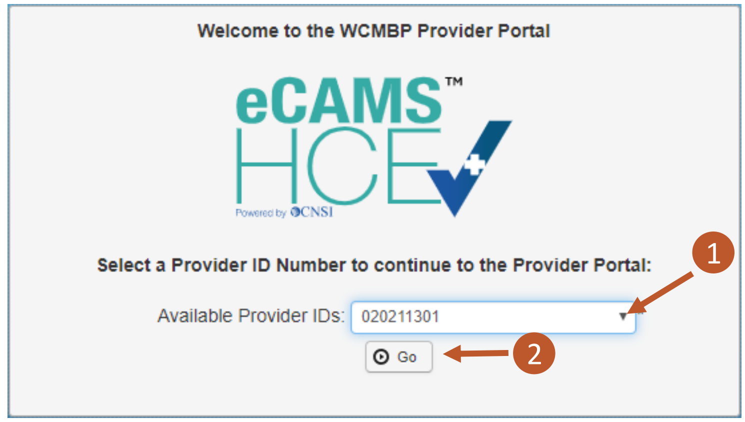
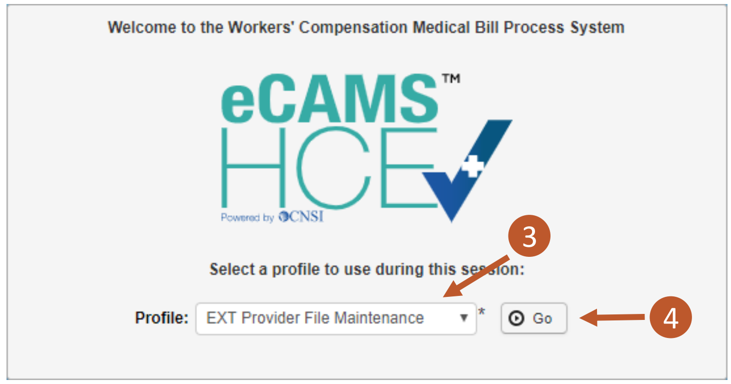
Selecting Provider ID and Profile

1. Select the Provider ID from the **Available Provider IDs** drop-down.
2. Select the **Go** button.



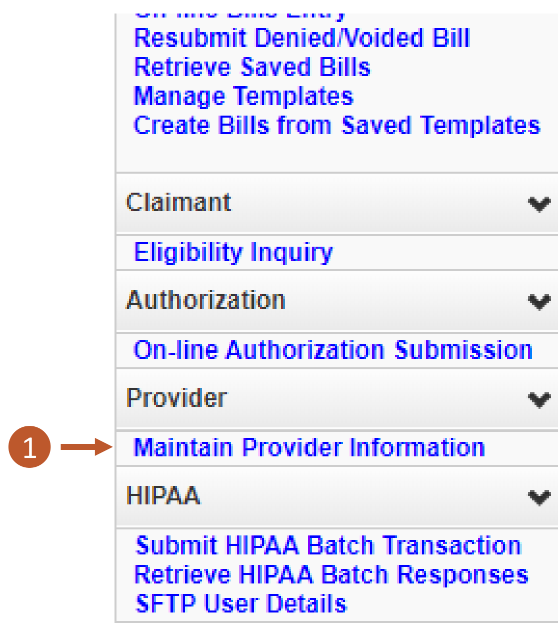
3. Select the Profile from the **Profile** drop-down (ex. EXT Provider File Maintenance).
   Note: Choose the applicable profile to access the relevant functionalities of the provider portal.
4. Select the **Go** button.

You will then be taken into the Provider Portal.



Updating Information

1. Select the **Maintain Provider Information** hyperlink to navigate to the View/Update Provider Data screen.



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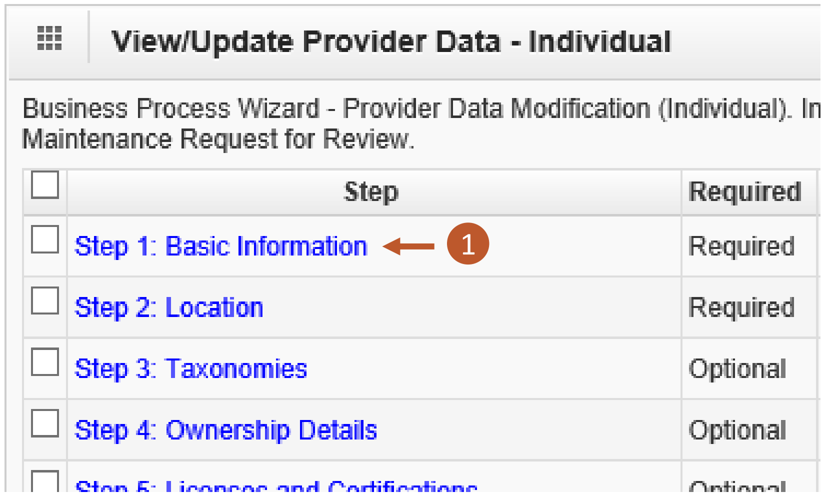
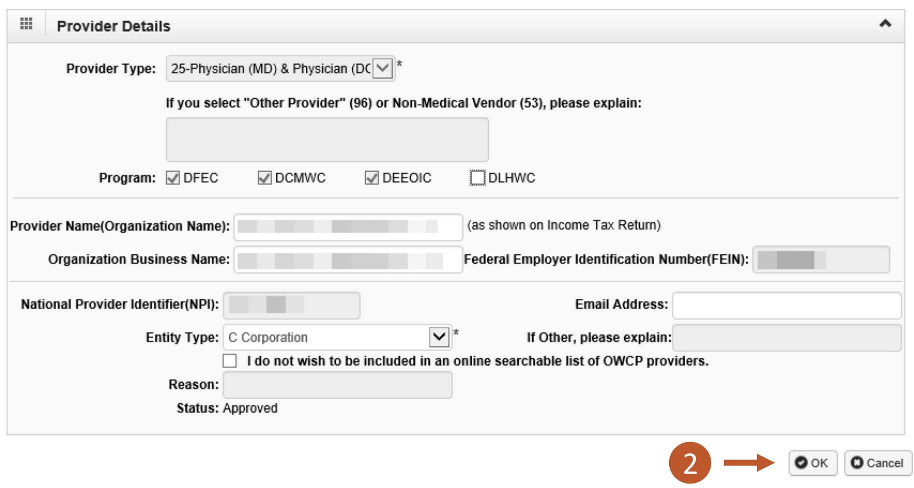
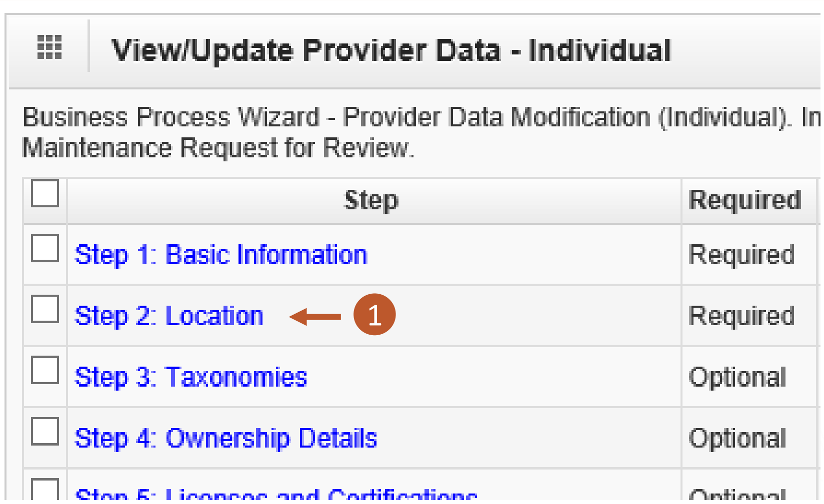
Updating Basic Information

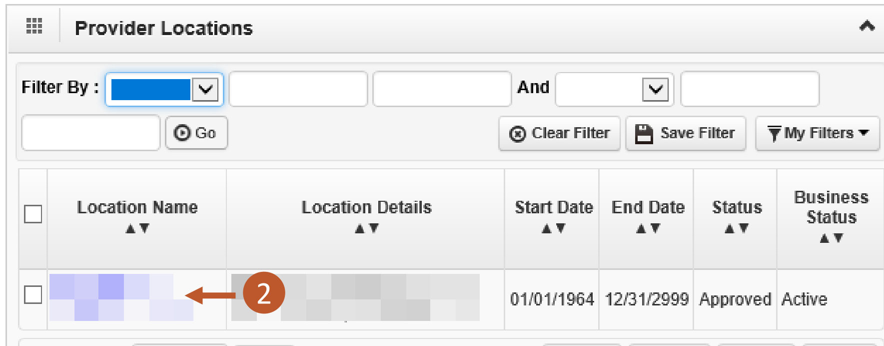
1. Select **Step 1: Basic Information** hyperlink.	
2. Make necessary updates to any of the fields that are editable and then select the **OK** button. **Note:** If this is the only step needing an update, proceed to the last step to **Submit Maintenance Request for Review**.	

Updating Location

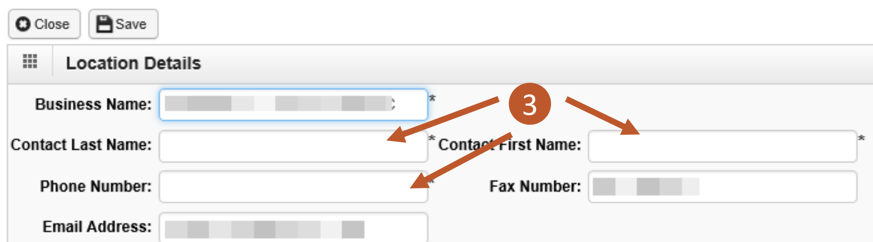
1. Select **Step 2: Location**.	

Updating Location

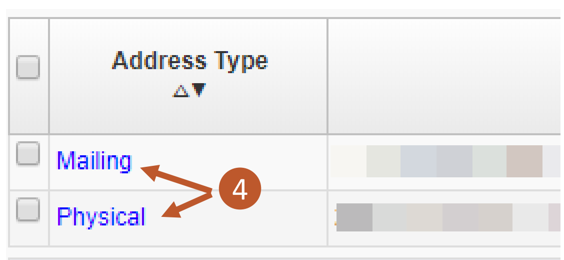
2. Select the **Location Name** blue hyperlink to review the Physical and Mailing addresses.



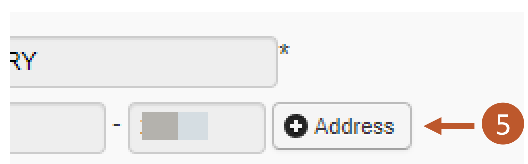
3. In addition to reviewing the Physical and Mailing addresses, users will be required to enter a **Contact Last Name, First Name**, and **Phone Number**.



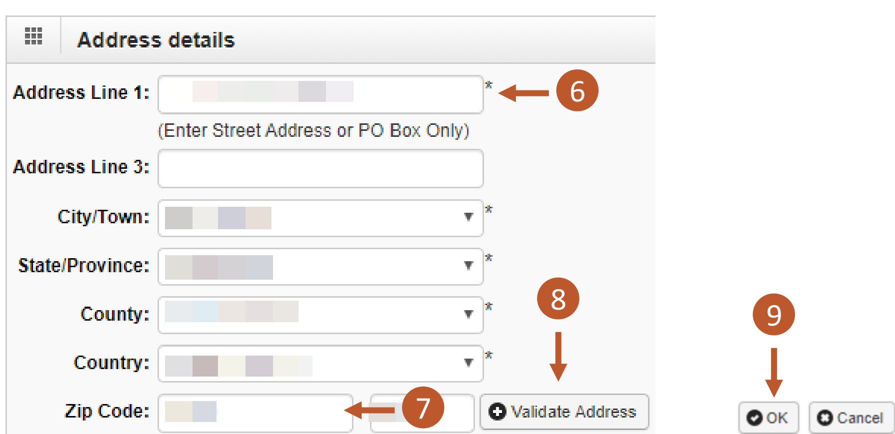
4. If needing to change your mailing or physical address, select the hyperlinked **Address Type** at the bottom of the Location Details page.



5. Select the **+ Address** button at the bottom of the Location Address screen.



6. Enter the new street address in the first line and second or third, if needed.
7. Enter the zip code of the new address.
8. Select the **Validate Address** button
   Note: If the address is valid, the city/town, State/Province, County, and Country should auto-populate.
9. After the system has validated the address, select the **OK** button at the bottom right of the screen.



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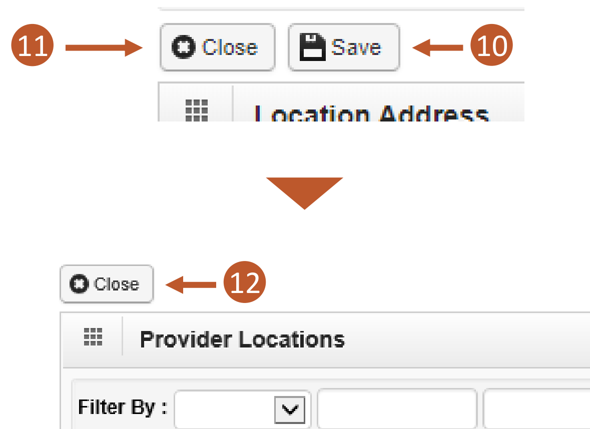
Updating Location

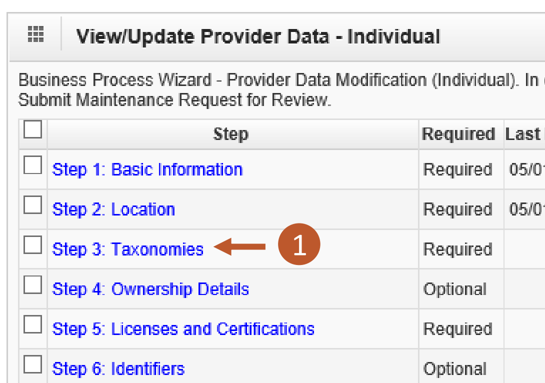
10. After reviewing and entering the required information, select the **Save** button.
11. After saving the update, select the **Close** button.
    Note: On the Provider Location List page, if there is a data change in location, there will be two records on the Provider Location List page (one “Approved” and one “In Review”). Once the updated location is approved, the previously added location will be replaced with the new one.
12. Select **Close** again on the Provider Locations list page as well.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.



Updating Taxonomies

1. Select **Step 3: Taxonomies.**
   Note: This step will be required depending on the Provider Type assigned during enrollment.



2. Review the Taxonomy information. If additional are needed to be added, select the **Add** button, otherwise, select the **Close** button.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.

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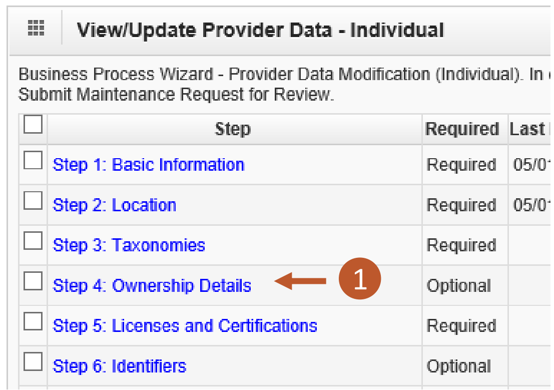
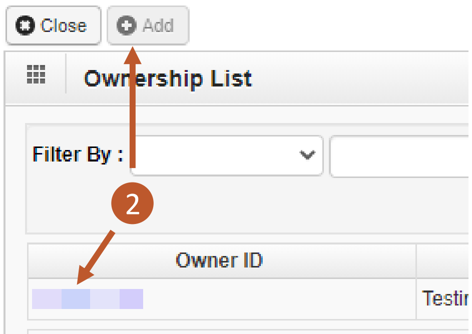
Updating Ownership Details

1. Select **Step 4: Ownership Details**.



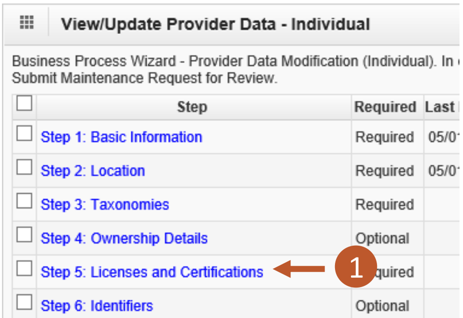
2. Either select the **Owner ID** hyperlink to make changes or select the **Add** button to add Ownership Details.

Note: If this is the only step needing and update, proceed to the last step to Submit Maintenance Request for Review.

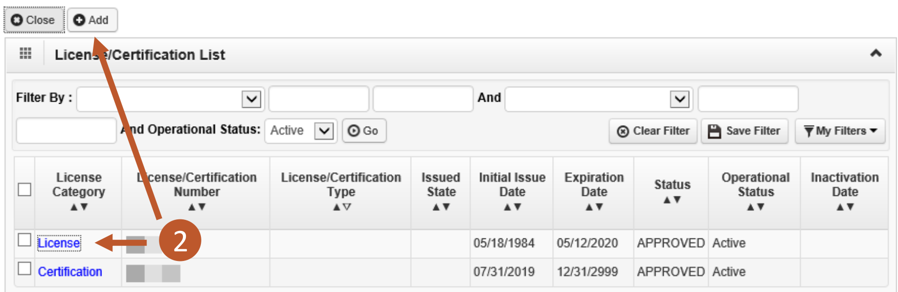


Updating Licenses and Certifications

1. Select **Step 5: Licenses and Certifications**.

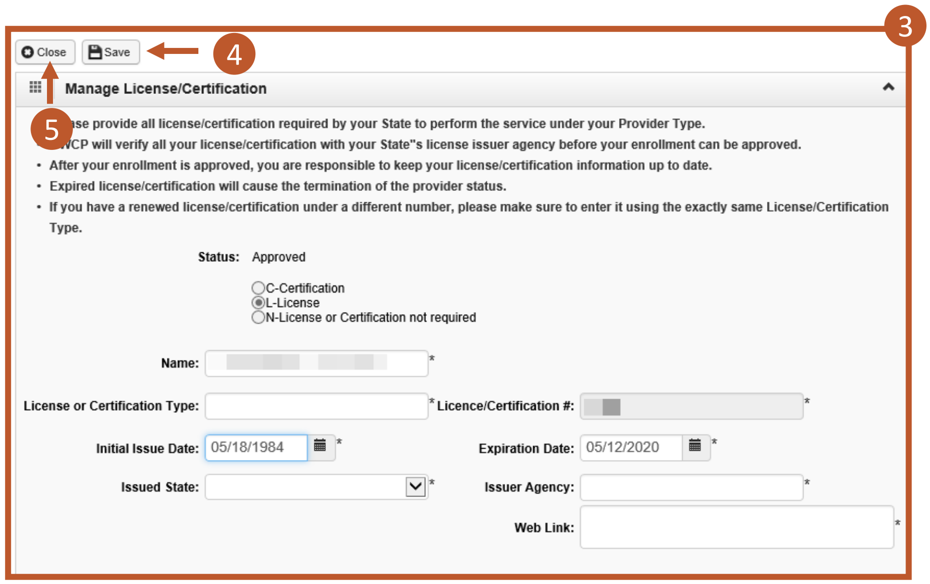


2. To update the license or certification, select the blue **License** and/or **Certification** hyperlink.
   Note: To add a new license number, select the **Add** button and add the new license information.



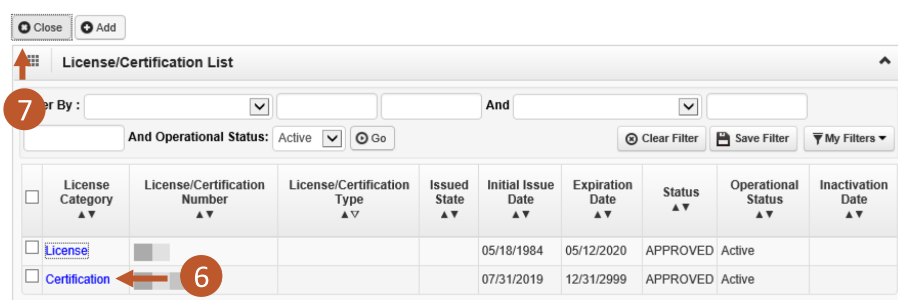
Updating Licenses and Certifications

3. Within this step, the following will be needed:
    - Name
    - License or Certification Type
    - Initial Issue Date
    - Expiration Date
    - Issued State
    - Issuer Agency
    - Web Link where your license or certification can be verified.
4. After updating this information, select the **Save** button.
5. After saving the update, select the **Close** button.



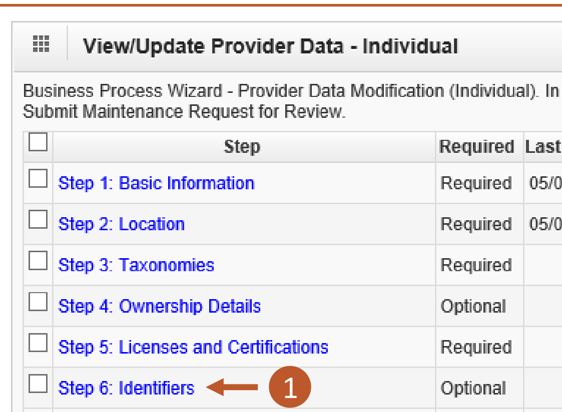
6. If multiple licenses or certifications are listed on the Licenses/Certification List page, steps 2-5 will need to be followed for each item listed in order to complete the update.
7. After making the update to all Licenses and Certifications, select the **Close** button on the License/Certification List page to return to the list of steps.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.



Updating Identifiers

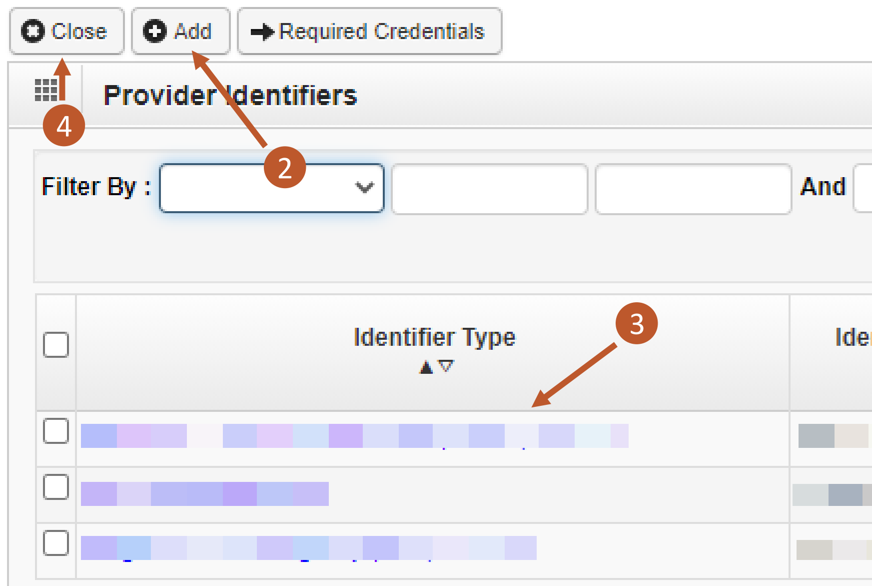
1. Select **Step 6: Identifiers**.



Updating Identifiers

2. Select the **Add** button to add additional Identifiers.
   If adding Identifiers, input the required information on the **Add New Identifier** window and then select the **OK** button on the **Add New Identifier** window.
3. Select the **Identifier Type** hyperlinks to update the respective Identifier.
   If making updates to Identifiers, select the **Save** button and return to the list of steps.
4. After saving the update, select the **Close** button.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.

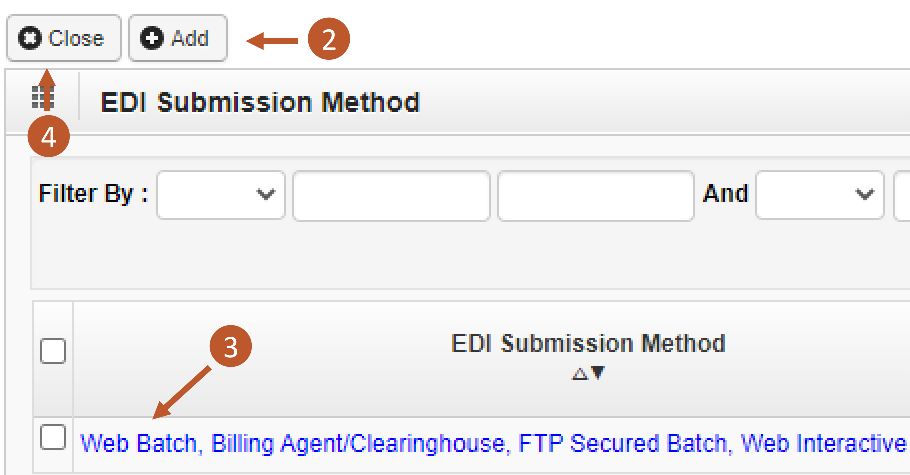


Updating EDI Submission Method

1. Select **Step 7: EDI Submission Method**.

2. Select the **Add** button to add EDI Submission Method.
   If adding an EDI Submission Method, select preferred mode(s) of submission on the **EDI Submission Details** window and then select the **OK** button on the **Add New Identifier** window.
3. Select the **EDI Submission Method** hyperlink to update previously selected modes of submission.
   If making updates to previously selected modes of submission, select the **OK** button and return to the list of steps.
4. After saving the update, select the **Close** button.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.



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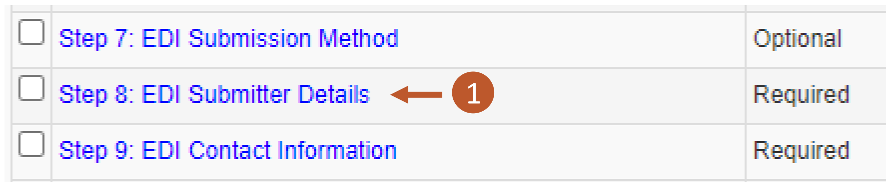
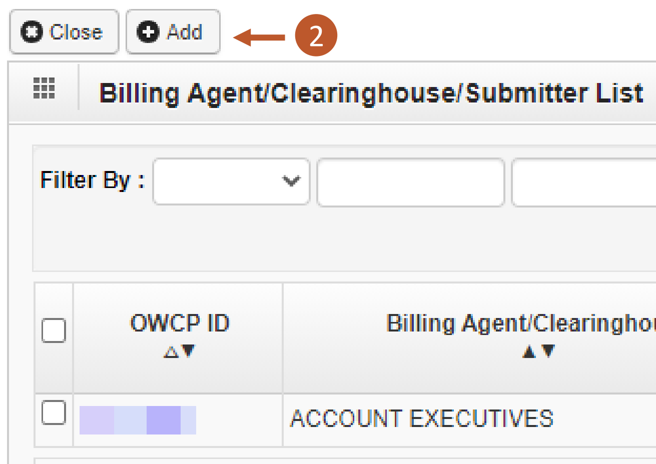
Updating EDI Submitter Details

1. Select **Step 8: EDI Submitter Details**.

Note: This step is marked as required only if Billing Agent/Clearinghouse was selected as an EDI Submission Method in the EDI Submission Method step, otherwise it would be marked as Optional.

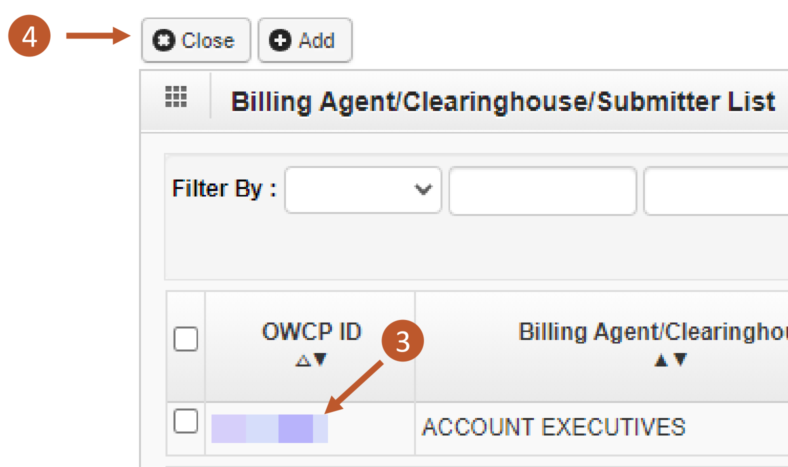


2. Select the **Add** button to add Billing Agent/Clearinghouse.
   If adding an EDI Submission Method, include Billing Agent/Clearinghouse OWCP ID, Start and End dates, and select the **OK** button on the **Associate Billing Agent/Clearinghouse** window.



3. Select the **OWCP ID** hyperlink to update the EDI Submitter Details.
   After making updates to the Billing Agent/Clearinghhouse Submitter, select the **Save** button on the **Manage Billing Agent/Clearinghouse Association** page.
4. After saving the update, select the **Close** button.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.



Updating Provider Information in the Provider Portal

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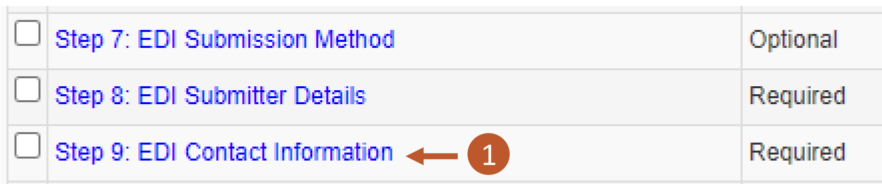
Updating EDI Contact Information

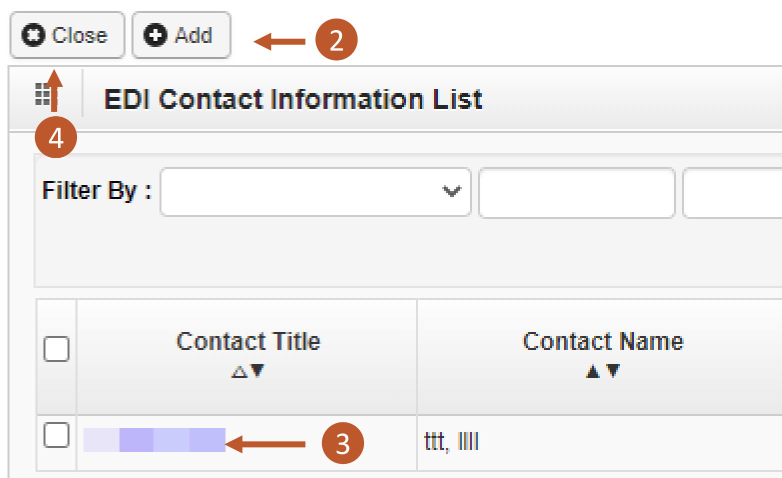
1. Select **Step 9: EDI Contact Information**.

Note: This step is marked as required only if Web Batch and/or FTP Secured Batch was selected as an EDI Submission Method in the EDI Submission Method step.



2. Select the **Add** button to add EDI contacts.
   If adding a contact, input the required information on the **Add EDI Contact Information** window and then select the **OK** button on the **Add EDI Contact Information** window.
3. Select the **Contact Title** hyperlinks to update the respective contact information.
   After making updates to a contact, select the **Save** button.
4. After saving the update, select the **Close** button.

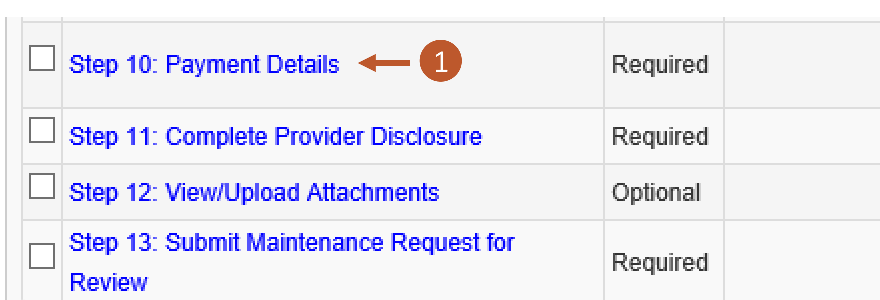
Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.



Updating Payment Details

1. Select **Step 10: Payment Details**.

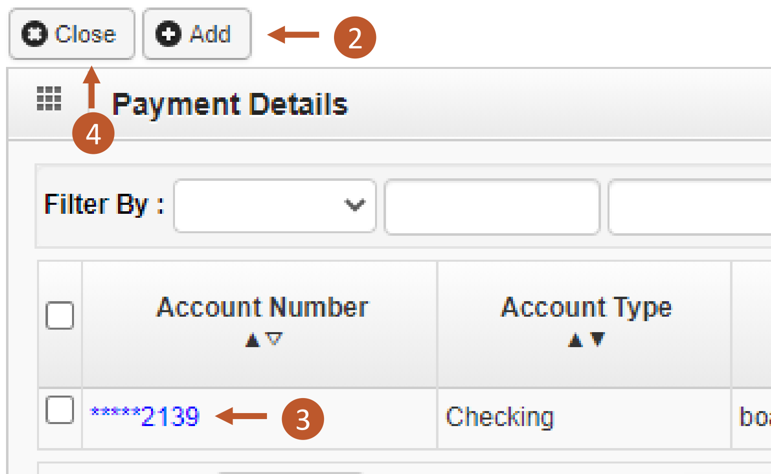
Note for Group Providers: If you are enrolled as a Group Provider, an additional step is included prior to this step for adding/associating “Servicing Providers.” The instructions for updating that step is included after the “Submit Maintenance Request for Review” step.



Updating Payment Details

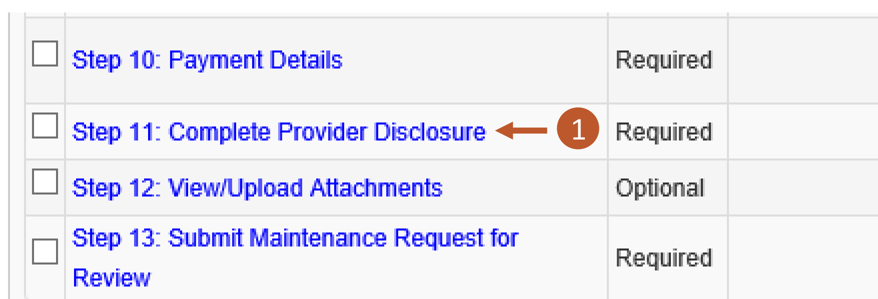
2. Select the **Add** button to add payment details if there is not currently payment details listed.
   If adding a contact, input the required information on the **Payment Details** window and then select the **OK** button on the **Payment Details** window.
3. Select the **Account Number** hyperlinks to update the respective payment details.
   After making updates to the payment details, select the **OK** button.
4. After selecting the **OK** button, select the **Close** button.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.

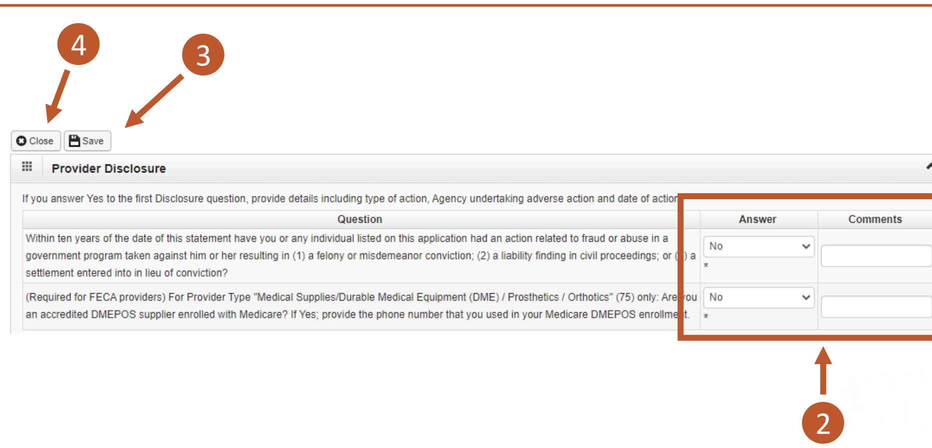


Complete Provider Disclosure

1. Select **Step 11: Complete Provider Disclosure**



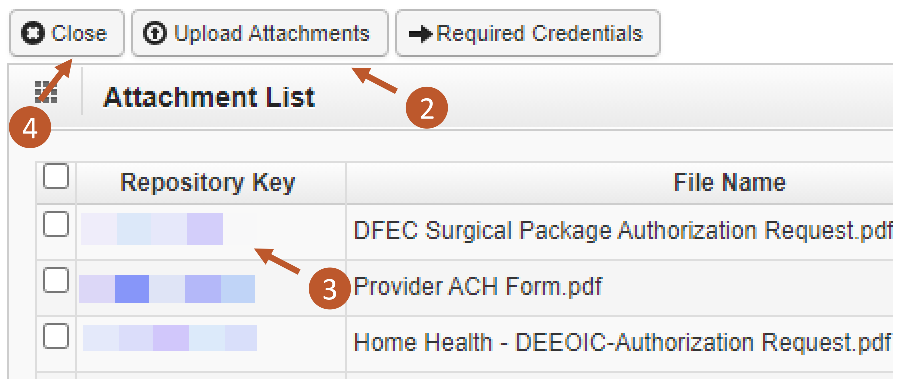
2. Update the answers to the two questions on the Provider Disclosure page and provide comments if necessary
3. Select the **Save** button.
4. Select the **Close** button.



View/Upload Attachments

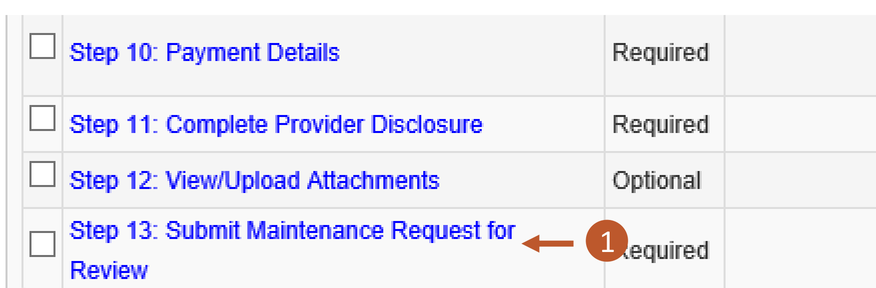
1. If uploading any required attachments, select **Step 12: View/Upload Attachments**.

2. To upload attachments, select the **Upload Attachments** button.
3. To view attachments that were previously uploaded, select the **Repository Key** hyperlink.
4. Select the **Close** button.



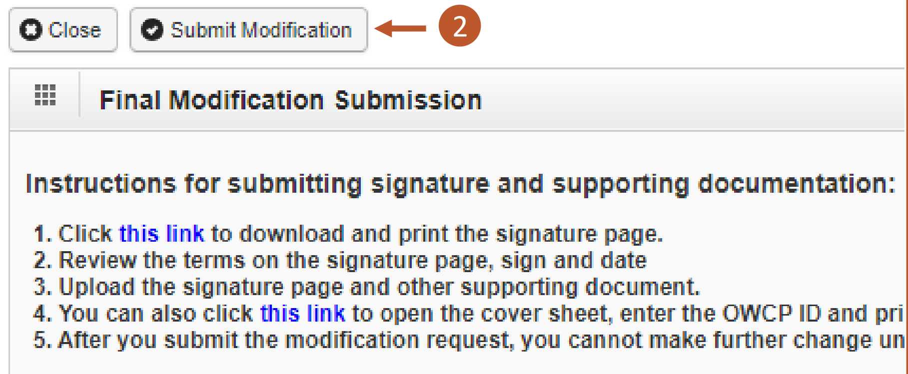
Submit Maintenance Request for Review

1. As a required step, select **Step 13: Submit Maintenance Request for Review** hyperlink to submit the updates of the information for review.



Submit Maintenance Request for Review

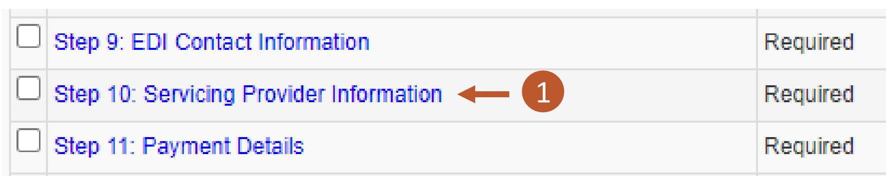
2. On the Final Modification Submission page, carefully read the instructions, and then select the **Submit Modification** button.
   Note: Additional modifications to the information will not be allowed until after the modification submission has been reviewed by CNSI staff.



Updating Servicing Provider Information
(FOR PROVIDERS THAT ENROLLED AS GROUP PROVIDERS)

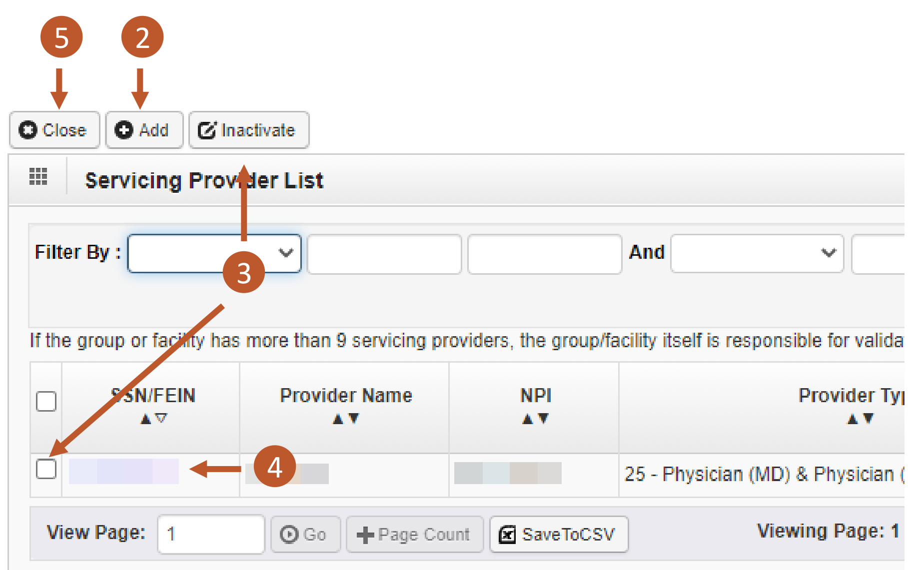
This step is an additional step that would appear before the **Payment Details** step if the Provider enrolled as a **Group Provider.**

1. Select **Step 10: Servicing Provider Information**.



2. Select the **Add** button to add associate additional servicing providers.
   If associating additional servicing providers, input the required information on the **Associate Servicing Provider** window and then select the **OK** button on the **Associate Servicing Provider** window.
3. If you need to make a servicing provider inactive, select the checkbox next to the SSN/FEIN link, select the **Inactivate** button, when select **OK** on the confirmation window to confirm.
4. Select the **SSN/FEIN** hyperlinks to update the respective servicing provider.
   If making updates to the servicing provider(s) selected, select the **Save** button and return to the list of steps.
5. After saving the update, select the **Close** button.

Note: If this is the only step needing an update, proceed to the last step to Submit Maintenance Request for Review.



Changing Profiles

Note: Profiles can be switched at any point while in the Provider Portal by selecting the profile drop-down in the blue bar near the top of the Provider Portal. A list of available profiles will be displayed. Select the applicable profile from this drop-down and the Provider Portal functions that you have access to will be updated after making that selection.