MANAGING CLERKS ON THE PROVIDER PORTAL

Pam Raisley, SoonerCare Education Specialist
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DESCRIPTION

• The Managing Clerks webinar is intended to assist any and all providers in utilizing their Provider Portal accounts including adding new clerks, adding registered clerks, adding registered billing agents, adding enrollment agents, as well as managing existing clerks.

Recommended Audience:

• The webinar is intended for all providers, office managers, billing agents, and/or clerks.
DISCLAIMER

• The information and screenshots provided in this presentation are for demonstration purposes only and are subject to change. This information is current as of July, 2020.

• Stay current with up-to-date information on the OHCA public website: www.okhca.org.
MANAGE ACCOUNTS
MY HOME – MANAGE ACCOUNTS

• Administrators can:
  • create clerks.
  • create billing agents.
  • create enrollment agents.
  • give access to existing clerks.
  • inactivate clerks no longer employed.

• Clerks:
  • cannot create other clerks.
  • can allow users to log on to multiple providers with one username/password.
  • can become enrollment agents.
MY HOME – MANAGE ACCOUNTS
MANAGE ACCOUNTS – ADD NEW CLERK

- First and last name.
- Birth date.
- Last 4 digits of driver’s license number (DLN).
- Disposition functions for the clerk (select one or more appropriate functions).

*DLN does not have to be real. However, registrant needs to know the information.
MANAGE ACCOUNTS – ADD NEW CLERK

The clerk has been added to your clerk list.

The clerk code for the new clerk is 10377. The clerk code is required to be communicated to the new clerk for registering with the portal.
MANAGE ACCOUNTS – EXISTING CLERKS

- **Inactive – Pending**: clerk has been revoked from the provider account. Clerk has not completed their registration.
- **Inactive**: clerk has been revoked from the provider account. Clerk has completed their registration.
- **Active – Pending**: clerk is active on the provider account. Clerk has not completed their registration.
- **Active**: clerk is active on the provider account. Clerk has completed their registration.
- **Last 4 of DLN and Clerk Code**: needed in order for clerk to register their account.

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Display Name</th>
<th>Birth Date</th>
<th>Last 4 of DLN</th>
<th>Clerk Code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>roberts, william</td>
<td>William Roberts</td>
<td>10/02/1974</td>
<td>9321</td>
<td>10230</td>
<td>Inactive – Pending</td>
</tr>
<tr>
<td>2</td>
<td>hoop, betty</td>
<td>BettyHoop</td>
<td>01/01/1990</td>
<td>9999</td>
<td>10266</td>
<td>Inactive</td>
</tr>
<tr>
<td>3</td>
<td>bowman, mark</td>
<td>mark bowman</td>
<td>11/10/1959</td>
<td>0000</td>
<td>10274</td>
<td>Active – Pending</td>
</tr>
<tr>
<td>4</td>
<td>campos, test2016</td>
<td>Israel</td>
<td>12/13/1980</td>
<td>1111</td>
<td>10533</td>
<td>Inactive</td>
</tr>
<tr>
<td>5</td>
<td>clifton, crystal</td>
<td>cred agent</td>
<td>03/28/1987</td>
<td>1234</td>
<td>10250</td>
<td>Active</td>
</tr>
</tbody>
</table>
MANAGE ACCOUNTS – EXISTING CLERKS

Clerk Assignment

Modify the fields below and click the Submit button to update the information.
First Name: Gil
Last Name: Grissom
Birth Date: 09/17/1979
Last 4 of DLH: 3232
Clerk Code: 10259
Status: Active

Select the functions that the clerk is authorized to access.
(At least one function must be selected)
Functions:
- Claim - Inquiry
- Claim - Submit and Resubmit
- Claim - Submit Pharmacy
- Eligibility Verification
- Newborn Application Access
- Patient Dismissal
- Payment History - Inquiry
- Pharmacy Claim
- Prior Authorization - Submit Resubmit Authorization
- Prior Authorization - View Authorization
- Prior Authorization - View Authorization Notice
- Referrals - View Referral
- Reports
- Search Fee Schedule
- Secure Correspondence
- Treatment History
- Treatment History - View Authorization Notice
- Treatments - View Referral Notice
- Reports
- Search Fee Schedule
- Secure Correspondence
- Treatment History

Submit  Cancel
MY HOME – ADD REGISTERED CLERKS

Clerk Assignment

Add New Clerk | Add Registered Clerk | Add Registered Billing Agent | Designate Billing Agent | Add Enrollment Agent

* Indicates a required field
Enter the Last Name and the Clerk Code to add that Clerk to your Clerk list then click Submit to proceed.

- Last Name
- Clerk Code

Select the functions that the clerk is authorized to access.
(At least one function must be selected)

- Functions
  - Claim - Inquiry
  - Claim - Submit and Resubmit
  - Claim - Submit Pharmacy
  - Eligibility Verification
  - File Management
  - Financial
  - Letters
  - Newborn Application Access
  - Patient Dismissal
  - Payment History - Inquiry
  - Pharmacy Claim
  - Prior Authorization - Submit Resubmit Authorization
  - Prior Authorization - View Authorization
  - Prior Authorization - View Authorization Notice
  - Referrals - View Referral
  - Reports
  - Search Fee Schedule
  - Secure Correspondence
  - Treatment History

Submit | Cancel
MY HOME – ADD REGISTERED BILLING AGENT

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**Clerk Assignment**

Add New Clerk | Add Registered Clerk | Add Registered Billing Agent | Designate Billing Agent | Add Enrollment Agent

*Indicates a required field.
Enter the Display Name and the Agent Code to add that billing agent to your billing agent list, then click Submit to proceed.

**Display Name**

**Agent Code**

Select the functions that the clerk is authorized to access.
(At least one function must be selected)

- Claim - Inquiry
- Claim - Submit and Resubmit
- Claim - Submit Pharmacy
- Eligibility Verification
- File Management
- Financial
- Letters
- Newborn Application Access
- Patient Dismissal
- Payment History - Inquiry
- Pharmacy Claim
- Prior Authorization - Submit Resubmit Authorization
- Prior Authorization - View Authorization
- Prior Authorization - View Authorization Notice
- Referrals - View Referral
- Reports
- Search Fee Schedule
- Secure Correspondence
- Treatment History

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**Billing Agents**

Click the Billing Agent’s Agent Code to change the status and/or the functions of the Billing Agent.

<table>
<thead>
<tr>
<th>#</th>
<th>Agent Code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>20873</td>
<td>Active</td>
</tr>
</tbody>
</table>

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Contact EDI
MY HOME – ADD ENROLLMENT AGENT

• Enrollment agents must be created as a clerk and given at least one function before they can be assigned the enrollment agent role.
REGISTERING A CLERK
CLICK THE “REGISTER NOW” LINK
# CLICK THE “CLERK” ICON

<table>
<thead>
<tr>
<th>Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select one of the following options that best describes your role.</td>
</tr>
</tbody>
</table>

- **Provider**
  An individual, state or local agency, corporate, or business entity that is enrolled in the Healthcare program as a provider of services.

- **Billing Agent**
  An individual, state or local agency, corporate, or business entity that is enrolled in the Healthcare program as a billing agent for services.

- **Clerk**
  An individual designated by the Provider or Billing Agent for the sole purpose of performing clerical functions and is responsible for ensuring patient privacy information accessed via this website is to be used only for legitimate business reasons.
ENTER THE CLERK’S PERSONAL INFORMATION

Registration Step 1 of 2 - Personal Information

* Indicates a required field.

Please provide the following information to get started:

*First Name: Gil
*Last Name: Grissom
*Birth Date: 09/01/1979
*Last 4 of DLN: 1234
*Clerk Code: 10377

[Continue] [Cancel]
CREATE CLERK USER ID, PASSWORD, ETC.

Registration Step 2 of 2 – Security Information

* Indicates a required field.

The User ID and Password cannot be the same and the password cannot contain more than two consecutive characters of your display name. The user id must be 8 to 20 characters in length and contain a minimum of 1 number, 1 letter, no spaces and no special characters. The password must be 8-20 characters in length, contain a minimum of 1 numeric digit, 1 uppercase letter and 1 lowercase letter.

*User ID
User ID is a required field.

*Password
Password is a required field.

*Confirm Password
Confirm Password is a required field.

Please provide your contact information below.

*Display Name
Display Name is a required field.

*Phone Number
Phone Number is a required field.

*Email
Email is a required field.

*Confirm Email
PORTAL ACCESS FORM
PROVIDER PORTAL ACCESS FORM

• Reasons to use Provider Portal Access Form:
  • New administration has no access to Provider Portal.
  • Email on provider account is no longer valid.
  • Received “Welcome Letter" but never received PIN Letter.
  • Created a new contract not knowing the Provider Portal account had been previously created.
  • Provider changed employment.
PROVIDER PORTAL ACCESS FORM

SoonerCare Provider Portal Access Form
http://okhca.org/pin
INTERNET HELP DESK

• Email: SoonersCareInternetHelpDesk@dxc.com.

• Phone Number:
  1-800-522-0114, Option 2 and then 1.
PROVIDER FIELD CONSULTANTS

In-Office Training Requests

• Email: SoonerCareEducation@okhca.org.

Include:
Provider ID.
Contact phone and email address.
Physical site location.