

MANAGING CLERKS ON THE PROVIDER PORTAL

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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

Oklahoma HealthCare Authority

My Home | Eligibility | Claims | Prior Authorizations | Referrals | Files Exchange | Financial | Letters | Reports | Resources

My Home [Contact Us](#) | [Logout](#)
Tuesday 08/14/2018 09:12 AM CST

Broadcast Messages

Provider letter 2018-13 serves to inform I/T/U providers about a change to revenue code 513 (Behavioral Health Encounters). In addition, a new revenue code 528 (Off-site Services Encounters) - goes into effect Sept. 1, 2018.

Please post all comments by close of business Aug. 23, 2018, via the Oklahoma Health Care Authority (OHCA) Policy Change Blog: <http://okhca.org/PolicyBlog>.

Thank you for participating in this process.

Please acknowledge receipt of message by checking this box.

User Details

Welcome **Gil Grissom**

- My Profile
- Manage Accounts**

Provider

Name John Sooner

Provider ID 0123456789
Taxonomy 332B12345X
SC Provider Number 100999123A

Provider Services

- Search Payment History

Welcome Health Care Professional!

We are committed to make it easier for physicians and other providers to perform their business. In addition to providing the ability to verify member eligibility and submit claims, our secure site provides access to payment history and the ability to search for helpful information under the Resources menu.

- Contact Us
- Secure Correspondence
- Referrals
- Update Provider Files
- Upload Behavioral Health Records
- Helpful Links
 - Insure Oklahoma Employer/Agent Portal

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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).

My Home > Manage Accounts [Contact Us](#) | [Logout](#)
 Friday 08/24/2018 03:42 PM CST

Clerk Assignment [Back to My Home](#) ?

[Add New Clerk](#) | [Add Registered Clerk](#) | [Add Registered Billing Agent](#) | [Designate Billing Agent](#) | [Add Enrollment Agent](#)

* Indicates a required field.
 Enter the fields below and click **Submit** to generate the clerk code for the new clerk to register.

*First Name
 *Last Name
 *Birth Date 
 *Last 4 of DLN

*DLN does not have to be real. However, registrant needs to know the information.

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
- Prior Authorization - View Authorization Notice
- Referrals - View Referral
- Reports
- Search Fee Schedule
- Secure Correspondence
- Treatment History



Clerks

Click the Clerk's **name** to change the status and/or the functions of the Clerk.

#	Name ▲	Display Name	Birth Date	Last 4 of DLN	Clerk Code	Status
1	beavers, brandon	brandon beavers	10/02/1974	4321	10259	Inactive - Pending

MANAGE ACCOUNTS – ADD NEW CLERK

My Home > Manage Accounts [Contact Us](#) | [Logout](#)
Friday 08/24/2018 03:39 PM CST

Clerk Assignment [Back to My Home](#) ?

[Add New Clerk](#)

Click **Confirm** to confirm the request. Click **Cancel** to cancel it.

First Name Gil
Last Name Grissom
Birth Date 09/17/1979
Last 4 of DLN 1234

Functions

- 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

OK

Edit **Confirm** **Cancel**

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.

Clerks						
Click the Clerk's name to change the status and/or the functions of the Clerk.						
#	Name ▲	Display Name	Birth Date	Last 4 of DLN	Clerk Code	Status
1	roberts, william ←	William Roberts	10/02/1974	4321	10259	Inactive - Pending
2	boop, betty	BettyBoop	01/01/1990	9999	10266	Inactive
3	bowman, mark	mark bowman	11/30/1958	0000	10274	Active - Pending
4	campos, test2016	Israel	12/13/1980	1111	10333	Inactive
5	clifton, crystal	cred agent	03/28/1987	1234	10250	Active

MANAGE ACCOUNTS – EXISTING CLERKS

Clerk Assignment [Back to My Home](#) ?

[Edit Clerk](#)

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 DLN 3232
Clerk Code 10259
***Status** Active Inactive

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
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- Treatment History



MY HOME – ADD REGISTERED CLERKS

Clerk Assignment [Back to My Home](#) 

[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



MY HOME – ADD REGISTERED BILLING AGENT

[Back to My Home](#) ?
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)

***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



Contact
EDI

Billing Agents

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

#	Agent Code ▲	Display Name	Status
1	20873	grissom, gil	Active

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.

Clerk Assignment [Back to My Home](#) ?

[Add New Clerk](#) [Add Registered Clerk](#) [Add Registered Billing Agent](#) [Designate Billing Agent](#) [Add Enrollment Agent](#)

Select a Clerk to add as your enrollment Agent. Only one enrollment agent can be setup per Provider. Click Remove to remove an enrollment Agent.

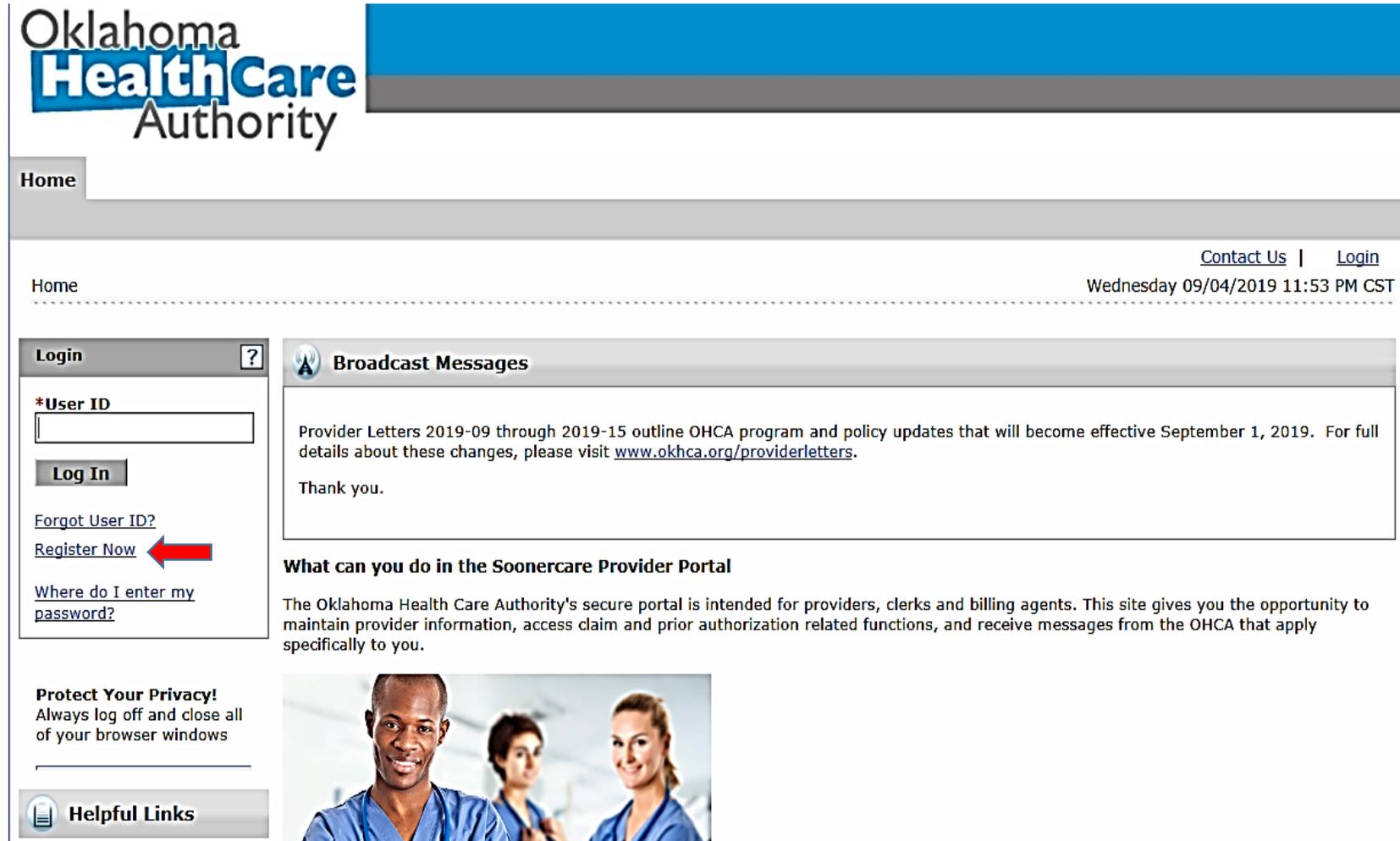
****Please note: Your Enrollment Agent will answer questions related to information on your provider application/renewal or updates to your provider Profile Information, Banking information, etc.**

Enrollment Agent	Action
*Enrollment Agent	
Add Enrollment Agent	

- cred agent (10250)
- Pam (10189)
- Pam (10260)
- Pam Clerk (10327)
- Prince William (10308)

REGISTERING A CLERK

CLICK THE “REGISTER NOW” LINK



Oklahoma Health Care Authority

Home

Home [Contact Us](#) | [Login](#)

Wednesday 09/04/2019 11:53 PM CST

Login ?

*User ID

Log In

[Forgot User ID?](#)

[Register Now](#) 

[Where do I enter my password?](#)

Broadcast Messages

Provider Letters 2019-09 through 2019-15 outline OHCA program and policy updates that will become effective September 1, 2019. For full details about these changes, please visit www.okhca.org/providerletters.

Thank you.

What can you do in the Soonercare Provider Portal

The Oklahoma Health Care Authority's secure portal is intended for providers, clerks and billing agents. This site gives you the opportunity to maintain provider information, access claim and prior authorization related functions, and receive messages from the OHCA that apply specifically to you.

Protect Your Privacy!
Always log off and close all of your browser windows

Helpful Links



CLICK THE “CLERK” ICON

Registration

Select one of the following options that best describes your role.



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



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



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

[Home](#) > [Registration Selector](#) > Registration

Thursday 09/05/2019 04:31 AM CST

Registration Step 1 of 2 - Personal Information ?

* Indicates a required field.

Please provide the following information to get started!

*First Name	<input type="text" value="Gil"/>
*Last Name	<input type="text" value="Grissom"/>
*Birth Date	<input type="text" value="09/01/1979"/> 
*Last 4 of DLN	<input type="text" value="1234"/>
*Clerk Code	<input type="text" value="10377"/>

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 Ext

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.

INTERNET HELP DESK

- Email: SoonerCareInternetHelpDesk@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.

