

# Dean Health Plan

## Provider Portal Account Setup Guide

Updated 3/6/2020

# Provider Portal Setup Guide Overview

- Dean Health Plan (DHP) network providers can now get more out of their DHP provider portal account than ever!
- New Provider Portal setup options allow organizations the opportunity to create accounts to more effectively support internal business processes.
- What does this mean?
  - Organizations now have the ability to add multiple Tax IDs to one Provider Portal account
    - ability to centralize all billing and authorization/referral services

OR

- Organizations now have the ability to create multiple Provider Portal accounts under the same Tax ID
  - ability to register multiple accounts to reflect separate billings processes within an organization
    - Individual users can now register and access multiple separate Organizational accounts with one User ID
    - Gives users the ability to easily and access and navigate separate Organizational accounts without needing to logout

# What setup is best for my Organization?

- Discuss with internal system leadership about internal business practices
  - Are billing processes centralized?
  - Are authorization/referral processes centralized?
- If an organization only has one Tax ID, and/or all internal processes are centralized, then it is recommended to only register one account.
  - Individual Users access can be restricted by a Site Administrator to only allow access to the necessary applications and account details.
- If an organization has multiple Tax IDs or locations, then the number of accounts should reflect the breakdown of internal processes.
  - If there is a central billing or authorization/referral office, then one account may still be optimal.
  - A separate Organization Account can be created for each site if they have their own billing or authorization teams.
- Individual Users can register to have access to multiple accounts if some processes are centralized, but not others.
  - Allows any Individual User (including 3<sup>rd</sup> party billers and contracted vendors) to obtain access to multiple separate accounts with one User ID.
  - The Site Administrator on each account can limit each Individual User's access.

For setup questions specific to your organization, please contact your PNC!

# Recommendations

- A Single Organization Account is recommended for:
  - Solo practices
  - Group practices with only one Tax ID
  - Groups with centralized internal business processes
    - The same staff handles billing and claims for all locations
    - The same staff handles authorizations/referrals for all locations
- Multiple Organization Accounts are recommended for:
  - Large groups with decentralized internal business processes
  - Professional Health Organizations (PHOs)
  - Managed Care Organizations (MCOs)

# Setting Up Access

- Select one individual to register the organization. This user will also become the Site Administrator, so please give consideration to who this individual should be.
- Register using the organization's NPI and Tax ID. If there are multiple NPIs, please select the most commonly utilized for the organization, and do not use a professional NPI if possible.
- The first user will register both the Organization Account and their Individual access which will automatically be connected.
- Registration will be reviewed by an Administrator at the Health Plan, and a confirmation email will be sent once access is approved.
  - All other Individual users may then register under the NPI and Tax ID with which the account was created.
  - Site Administrator is responsible for approving and setting access for each additional user.
  - Additional TINs and NPIs can be added to the account by Site Administrators.
- If multiple Organizational accounts are needed, repeat this process for each account.
  - Each account will need to be registered separately. The same individual may register all the accounts, or this can be done by separate individuals.
  - Each account will need to be registered with the applicable Tax ID and Organizational NPI.
    - \*\*Please note, the same NPI cannot be added to multiple accounts if they already contain the same Tax ID.

# Account Setup Options

An Organization can now setup all billing and authorization processes under one account

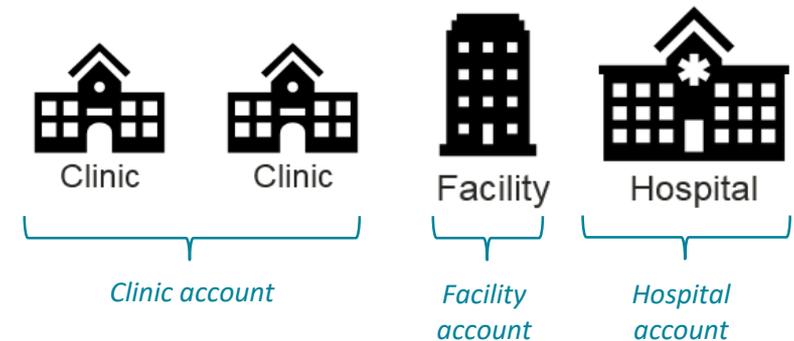
OR

Multiple accounts can be created based on business practices at each location

*Example 1 – all under one account*



*Example 2 – separate accounts*

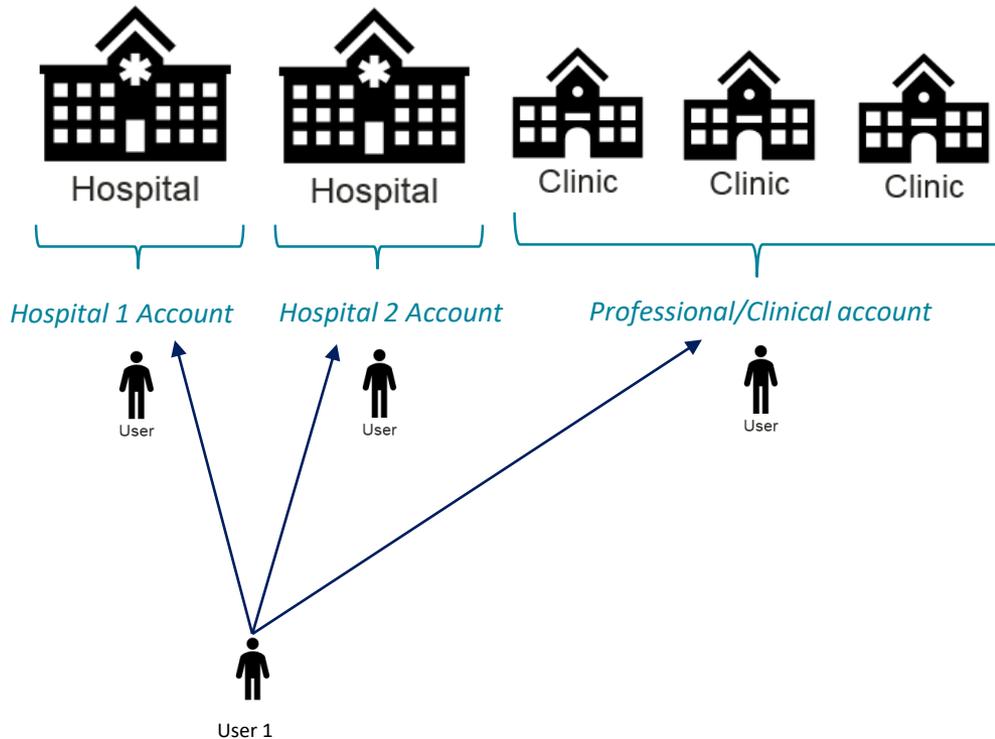


Locations can be separated and registered independently

- Easier to maintain for Site Administrators
- Users can register for each account with under the same User ID. (No need to create a separate login for each account)
- The same Tax ID can be added to multiple accounts
- The same location cannot be added to multiple accounts.

# Account Setup Options

Separate accounts can be created to reflect internal processes. For an Organization with multiple Hospitals and clinics, these can be registered together or separately.



If multiple accounts are created, users can register and obtain access to all accounts with one User ID (see User 1). Once approved, they can easily navigate across each account without logging out. Simply select the appropriate account from your access dropdown

The screenshot shows a 'Provider Selection' dialog box. It features a dropdown menu labeled 'ENTITY' with the text '- Select Entity -'. The dropdown is open, showing a list of options: '- Select Entity -', 'HOSPITAL 1', 'HOSPITAL 2', and 'PROFESSIONAL/CLINICAL'. At the bottom of the dialog, there are two buttons: 'Save Changes' and 'Close'. A blue arrow points from the text 'Simply select the appropriate account from your access dropdown' to the dropdown menu.