ProviderOne provider user manual

Enrolling as a facility, agency, organization, or institution (FAOI) provider

2021
Disclaimer

A contract known as the Core Provider Agreement (CPA), governs the relationship between HCA and Washington Apple Health providers. The CPA terms and conditions incorporate federal laws, rules and regulations, state law, HCA rules and regulations, and HCA program policies and billing instructions, including this user manual.

Providers must submit a claim in accordance with the HCA rules, policies, and billing instructions in effect at the time they provided the service. Every effort has been made to ensure this manual’s accuracy. However, in the unlikely event of an actual or apparent conflict between this document and a department rule, the department rule controls.
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About enrolling as an FAOI provider

FAOI stands for Facility, Agency, Organization, or Institution; any provider with an organizational NPI type can choose this enrollment type. FAOI has the greatest flexibility, groups billing for professional or pharmacy services, or any facility or institution.

The following ProviderOne topics and tasks are covered in this manual:

- Accessing the enrollment business process wizard (BPW)
- Entering provider basic information
- Completing the business process wizard steps
- Submitting the enrollment application to ProviderOne
Provider enrollment links

Start a new provider enrollment application by accessing:
https://www.wapproviderone.org/ecams/jsp/common/pgNewPrvdrEnrollment.jsp

Or click on this button if you are currently on the enrollment webpages at the Health Care Authority website:

Resume or track an enrollment application by accessing:
https://www.wapproviderone.org/ecams/jsp/common/pgTrackPrvdrApplctn.jsp

You will need your application ID and either the Social Security Number (SSN) or Federal Employer Identification Number (FEIN) to login.
Accessing the enrollment business process wizard (BPW)

Selecting the enrollment type
Once you have accessed the provider enrollment application, the Enrollment Type window is displayed.

- Select the appropriate enrollment form (provider enrollment type) and click the **Submit** button.

- ProviderOne displays the Basic Information page.
Provider basic information

Entering your basic information is the first step in the enrollment process. Successful completion of this step will result in:

- Confirmation that a duplicate enrollment does not already exist
- Assignment of an application ID
- Storage of the basic information in the provider enrollment staging area
- The first time this page displays, the application ID in the header will be blank. The information collected on this screen will vary based on the type of provider.
- Only choose DSHS, DOC or L&I if you are contracted with those agencies.
- If you are a billing provider, using the dropdown choose BL-Billing. If you are not a billing entity, choose NB-Non-billing.

• Enter the legal name that is registered with the Internal Revenue Service (IRS) into the Provider Name (Organization Name) field.

• In the Organization Business Name field, enter the “doing business as” (DBA) name.

• Enter your FEIN.

• Complete the bottom portion of the basic information page:
  o Enter Yes to the question using the dropdown if you are mandated to have a Federal NPI number.
  o Enter the NPI.
  o Do not enter a UBI in this step.
  o Complete the W-9 Entity Type using the dropdown as appropriate for your business type.
- If you choose “Other”, an additional entry is required under W-9 Entity Type (If Other) field.
  - Enter the Other Organizational Information using the dropdown.
  - Enter the Email Address for your business.
  - Do not enter an enrollment effective date.
- After completing all required input, click the Next button.

- ProviderOne displays the Basic Information – Application ID page.
- Print this page or copy the application ID and store it in a safe place. If you exit the enrollment process prior to completion and want to return, you will need this number.
  - **Please note.** An application will be purged from the system if not completed within 180 days from the date the application was started.
- Click Next.
• ProviderOne displays the provider enrollment business process wizard (BPW).

• The Provider Basic Information status is now set to Complete.

<table>
<thead>
<tr>
<th>Required</th>
<th>Start Date</th>
<th>End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td>03/18/2021</td>
<td>03/18/2021</td>
<td>Complete</td>
</tr>
<tr>
<td>Required</td>
<td></td>
<td></td>
<td>Incomplete</td>
</tr>
</tbody>
</table>

• All steps marked as **Required** must have a status of **Complete** before the application can be submitted for review.
Add locations

Accessing the locations list
On the BPW screen:

- Click on the Add Locations hyperlink.

  **Step 2: Add Locations**

- ProviderOne displays the Locations list.
- The first time this list displays it will be blank. The Locations List displays all locations associated with this provider.
- To add a new record, click the Add button.

![Locations List](image)

About the add provider location form
Every provider enrolling with an NPI must have an NPI Base Location. The NPI Base Location is used to anchor all the provider’s NPI related specializations and related details.

For an NPI Base Location, three addresses are required:

- A Location address
- A Mailing address
- A Pay to address
- Mailing and pay to addresses are subordinate to the location address. If a Base Location is not identified, the BPW step will be “incomplete.”
• As addresses are being added under locations, do not enter an end date in the End Date field for any of these addresses. The end date is system generated and will auto populate to 12/31/2999.

• Be sure to complete all required fields marked with an asterisk, such as Phone Number.

• Additional optional fields to complete are Fax Number, Cell Phone Number, and Communications Preference using the dropdown (if email is chosen, an email address is required).

• If applicable, choose a WA Tax Revenue Code using the dropdown.

Add physical location information
In the Add a Physical Location area of the location list:

• Click the Add Address button.
• ProviderOne displays the Address details form.
• Complete the following fields:
  o Address line 1
  o Address line 2
  o Zip code
• Click on the **Validate Address** button.

![Address details form]

• ProviderOne validates the address information entered against the United States Postal Service (USPS) database.
• If the address entered is not located when the validate address button is clicked, the following error will appear at the top of the page:

![Error message]

• Correct the address and click the **Validate Address** button again.
• If the error message appears a second time, this does not indicate that the address is invalid.
• By clicking the **Ok** button, ProviderOne can override the error and the following pop up window will be displayed. Click **Ok** on the popup to save the address.

![Message from webpage]

• If you do not click the Validate address button, you will receive the below popup warning message. Click Ok to save the address or Cancel to revalidate the address using the steps above.

![Message from webpage]

Add mailing address information
Follow the instructions on the previous pages to add a mailing address.

• If the mailing address is the same as the physical address location, place a checkmark in the Same as Location Address box and the address will automatically be entered in the mailing address fields.

![Mailing Address]

Add pay to address information
Follow the instructions on previous pages to add a pay to address.

• If the pay to address is the same as the physical address location, place a checkmark in the Same as Location Address box and the address will automatically be entered in the address fields.

![Pay-To Address]
• Click the **Ok** button to save the information and close the window or **Cancel** to close the window without saving.

• If the information is saved, ProviderOne returns to the Locations List with the newly added address information.

• The Location List is displayed. If no additional location addresses are needed, click **Close**.

Adding an additional servicing location
If you have more than one clinic or location per billing NPI, follow the below step for adding servicing locations.

To add an NPI Servicing Location to the Base Location, two addresses are required:

• A **Location** address

• A **Mailing** address

• Back on the Locations List, click the **Add** button:
• ProviderOne displays the Add Physical Location Information screen.

• Use the dropdown to choose **NPI Servicing Location**.

```
Add Physical Location Information

Location Type: NPI Servicing Location

Location Information:
- Business Name of this Location:
- Contact First Name:
- Contact Last Name:
- City:
- State:
- Zip Code:
- Phone Number:
- Email Address:
- Web Page:

Add Address:
```

- Follow the steps noted on previous pages for adding the two required addresses for a Servicing Location.

- ProviderOne adds the second location to the Locations List.

```
Locations List

<table>
<thead>
<tr>
<th>Location Number</th>
<th>Location Name</th>
<th>Location Type</th>
<th>Location Details</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>TEST GROUP</td>
<td>NPI Base Location</td>
<td></td>
<td>12/31/2099</td>
</tr>
<tr>
<td>12101</td>
<td>TEST GROUP 2</td>
<td>NPI Servicing Location</td>
<td></td>
<td>12/31/2099</td>
</tr>
</tbody>
</table>
```

**Modifying a location record**

From the Locations List:

• Click the link in the Location Number column highlighted in blue.

```
Locations List

<table>
<thead>
<tr>
<th>Location Number</th>
<th>Location Name</th>
<th>Location Type</th>
<th>Location Details</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>TEST GROUP</td>
<td>NPI Base Location</td>
<td></td>
<td>12/31/2099</td>
</tr>
<tr>
<td>12101</td>
<td>TEST GROUP 2</td>
<td>NPI Servicing Location</td>
<td></td>
<td>12/31/2099</td>
</tr>
</tbody>
</table>
```
• ProviderOne displays the Location Details screen.
• Click the blue hyperlink for the address type you need to modify.
• After making your changes, click the **Save** button to save, or the **Close** button to close the window without saving.

![Location Details Screen](image)

• Use the Address List to add and edit other location addresses as needed.

**Add an address to a location**
From the Location Details screen:
• Click the **Add Address** button.

![Add Address Button](image)

• ProviderOne displays the Add Provider Location Address form.
• Choose **Type of Address** from the dropdown, either Mailing or Pay-To.
• Select the type of input option:
  o If you choose **Manually Input**, it allows you to add location address information using the steps on the previous pages.
  o Selecting the **Copy from Location Address** copies the details of the locations previously entered to this form.

![Add Provider Location Address](image)

• After completing the form, click the **Ok** button to save and return to the Location Details Screen or click the **Cancel** button to close without saving.

**Deleting a location**
• Check the box next to the record you want to delete and click the **Delete** button.
• Click the **Close** button to proceed to the next step in the BPW.

![Locations List](image)

**Please note.** When a location is deleted, all step details associated with that location, including Address, Specialties, and Licenses/Certifications will be deleted.
• **ProviderOne** displays the BPW with the status of this step now set to **Complete**.
Add specializations

Accessing the specialty/subspecialty List
From the BPW:

- Click the Add Specializations link.

**Step 3: Add Specializations**

- ProviderOne displays the Specialty/Subspecialty List.
- The first time this list displays it will be blank. This list displays all specializations by location.

Add specializations (at least one specialty must be added to each location)

- To add a new record, click the Add button.

ProviderOne displays the Add Specialty/Subspecialty form.

- To add a new record, click the Add button.

ProviderOne displays the Add Specialty/Subspecialty form.
• To add a specialty to a location, select the appropriate one from the **Location** drop down.
  o At least one specialty must be selected and added to a provider location.
  o Select **All** from the dropdown if the specialties will be performed in all locations associated to your domain.

![Image of Add Specialty/Subspecialty window]

• The next step is to choose the **Administration** from the dropdown.

• Then choose both the **Provider Type** (the first two digits of the taxonomy code) and the **Specialty** (digits three and four of the taxonomy code).

• Do not enter a date in the End Date field. ProviderOne will auto-populate this entry.

![Image of Add Specialty/Subspecialty window with selected Provider Type and Specialty]

• Entries for type and specialty will open the available taxonomy codes loaded in ProviderOne.
  o This will open the **Available Taxonomy Codes** loaded in ProviderOne.
  o Use the arrows to move the taxonomy code from the **Available Taxonomy Codes** box to the **Associated Taxonomy Codes** box.

• Click the **Ok** button to save the information and close the window or **Cancel** to close the window without saving.

![Image of Add Taxonomy Code window]
• ProviderOne validates the information entered, saves, and returns to the Specialty/Subspecialty List.

**Modifying a specialty/subspecialty record**

From the Specialty/Subspecialty List:

• Check the box next to the specialty you wish to modify and click the Update button.

• ProviderOne displays the Manage Specialty/Subspecialty list.

• Only the end date can be modified.
  - Entering an end date can cause issues with claims in ProviderOne so it is not recommended that this be changed from 12/31/2999 unless the specialty will no longer be used.

• After making your changes, click the Ok button to save, or the Cancel button to close the window without saving.
Deleting a specialty/subspecialty
Specialties and Subspecialties can only be deleted during the enrollment process.

- From the Specialty/Subspecialty List, check the box next to the record you want to delete and click the Delete button.
- From the Specialty/Subspecialty list, click the Close button and proceed to the next step in the BPW.

ProviderOne displays the BPW with the status set to complete.
View required credentials for specializations

Accessing the required credentials for specialization list

From the BPW:

- Click the **Required Credentials** button.

  ![Required Credentials button]

- ProviderOne displays the Required Credentials for Specializations list.
  - Depending on how many locations are added, additional licenses may be required (i.e., business and professional) per location.

- To view the License, Identifier, and Training requirements, use the **Filter By** drop down.

  ![Required Credentials For Specialization]

- When finished, click the **Cancel** button to close the window.
Add ownership details

Accessing the ownership and managing/controlling interest list
From the BPW:

- Click the Add Ownership Details link.

  **Step 4: Ownership & Managing/Controlling Interest details**

- ProviderOne displays the Ownership and Managing/Controlling Interest list.

Adding an owner

- To add a new record, click the Add button.

  ![Ownership and Managing/Controlling Interest List](image)

  - ProviderOne displays the Add Ownership & Managing/Controlling Interest Disclosures form.
• Choose the Disclosure Category by accessing the Disclosure Category dropdown.
• Choose the Disclosure Type by accessing the Disclosure Type dropdown.
• If it is an organization, use FEIN. If it is an Individual, use the SSN (without dashes).
• The Disclosure Start Date is the first day of ownership.
• Enter an Ownership Percentage.
• Complete the Ownership Association area by entering a Relationship Type and Associated Owner using the dropdowns.
• Click the Ok button to save the information and close the window or Cancel to close the window without saving.

• ProviderOne validates the information entered, then saves and returns to the Ownership & Managing/Controlling Interest Disclosures list. This list will display the new owners.
Modifying an owner record
From the ProviderOne Ownership & Managing/Controlling Interest Disclosures list:

- Click the blue link in the Owner/ME/BOD ID column.

- ProviderOne displays the Ownership & Managing/Controlling Interest Disclosures page.

- To change the address, click the **Address** button.

- After making your changes, click the **Save** button to save, or the **Close** button to close the window without saving.

Deleting an owner record
From the Owner/ME/BOD Id column:

- Check the box next to the record you want to delete and click the **Delete** button.
• From the Ownership & Managing/Controlling Interest List, click the **Close** button.

![Ownership and Managing/Controlling Interest List](image)

- ProviderOne displays the BPW. The status is now set to Complete.

![Ownership & Managing/Controlling Interest details](image)
Add licenses and certifications

Accessing the license/certification list
From the BPW:

- Click the Add Licenses and Certifications link.

**Step 5: Add Licenses and Certifications**

- ProviderOne displays the License/Certification list.
- The first time this list displays it will be blank. This list displays all licenses and certifications by location.

Adding a license/certification

Please note. Each location that a specialization has been added to will require the applicable credentials added (i.e., both professional and business license for each physical location).

- To add a new record, click the Add button.

![Image of License/Certification list](image)

- ProviderOne displays the Add License/Certification form.
- Use the Location dropdown to add a license or certification to a specific provider location.
  - Only select All if the license pertains to every location.
- Using the dropdowns, select the License/Certification Type, the License/Certification #, State of Licensure, and enter the Effective Date and the End Date.
- Click the Ok button to save the information and close the window or Cancel to close the window without saving.
• ProviderOne validates the information entered and saves and returns to the License/Certification List.

<table>
<thead>
<tr>
<th>License/Certification List</th>
</tr>
</thead>
<tbody>
<tr>
<td>License/Certification #</td>
</tr>
<tr>
<td>1102233</td>
</tr>
</tbody>
</table>

Modifying a license/certification record
From the License/Certification List:
• Click the blue hyperlink in the License/Certification # column.

<table>
<thead>
<tr>
<th>License/Certification List</th>
</tr>
</thead>
<tbody>
<tr>
<td>License/Certification #</td>
</tr>
<tr>
<td>1102233</td>
</tr>
</tbody>
</table>

• ProviderOne displays the Manage License/Certification form.
• After making your changes, click the Save button to save or the Close button to close the window without saving.

Deleting a license/certification
Licenses and certifications can only be deleted during the enrollment process.
From the License/Certification List:
• Check the box next to the record you want to delete and click the Delete button.
• From the License/Certification List, click the Close button.

<table>
<thead>
<tr>
<th>License/Certification List</th>
</tr>
</thead>
<tbody>
<tr>
<td>License/Certification #</td>
</tr>
<tr>
<td>1102233</td>
</tr>
</tbody>
</table>

• ProviderOne displays the BPW. The status is now set to Complete.
Add training and education

This step is optional and is not needed for enrollment.
Add Identifiers

This step is optional and is not needed for enrollment.
Add contract details

HCA providers should not enter contract details in this step.
Add federal tax details

W-9 information is required and collected for all providers.

Accessing the federal tax details page

From the BPW:

- Click the Add Federal Tax Details link.

  **Step 9: Add Federal Tax Details**

- ProviderOne displays the Federal Tax Details page.
- The W-9 Form is required for all providers.
- To access the W-9 Form, click the W-9 hyperlink.

  ![Federal Tax Details](image)

- ProviderOne displays the Form W-9 page.
- Complete the form and click the Ok button to save the information or the Cancel button to close the window without saving.

  ![Form W-9](image)
• ProviderOne returns to the Federal Tax Details list.

<table>
<thead>
<tr>
<th>Modifying a tax form record</th>
</tr>
</thead>
<tbody>
<tr>
<td>From the Federal Tax Details list:</td>
</tr>
<tr>
<td>• Click the link of the form you wish to modify.</td>
</tr>
<tr>
<td>• ProviderOne displays the appropriate tax form page.</td>
</tr>
<tr>
<td>• After making your changes, click the Ok button to save or the Cancel button to close the window without saving.</td>
</tr>
</tbody>
</table>
Deleting a tax form record
Do not delete the W-9 Form record. It is required in ProviderOne for all payable providers. Be sure to add a W-9 Form record if it was previously deleted.

From the Federal Tax Details page:

- Click the Close button and proceed to the next step in the BPW.

- ProviderOne displays the BPW. The status is now set to Complete.
Add EDI submission method

Accessing the EDI submission details page
From the BPW:

- Click the Add EDI Submission Method link.

  **Step 10: Add EDI Submission Method**

- ProviderOne displays the EDI Submission Details page.

Selecting EDI submission method(s)

- Place a check in the box next to the EDI Submission Method(s) you will use and click the Ok button.

  ![EDI Submission Details]

  You may check multiple Modes of Submission. NPI is required for all selections.

  - Web Batch
  - Billing Agent/Clearinghouse
  - FTP Batch
  - Web Interactive

  - Your EDI submission method is "Web Batch" if you currently upload and download batch files using WebRebWeb. This method is often used by providers who submit their own HIPAA batch transactions. It allows a maximum file size of 50 MB.
  - Your EDI submission method is "FTP Batch" if you submit and retrieve batches at a secure web folder assigned to you by BSHB. This method was designed with clearinghouses and billing agents in mind. It allows a maximum file size of 100 MB.

- ProviderOne displays the BPW. The status is now set to Complete.

  **Step 10: Add EDI Submission Method**

  Optional 03/16/2021 03/16/2021 Complete
Add EDI billing software details

Accessing the EDI billing software information list
From the BPW:

- Click the Add EDI Billing Software Details link.

  **Step 11: Add EDI Billing Software Details**

- ProviderOne displays the EDI Billing Software Information list.
- The first time this list displays it will be blank.

Adding an EDI billing software record

- To add a new record, click the Add button.

ProviderOne displays the Add EDI Billing Software Information page.

- If “Web Batch” was chosen in step 11, indicate “Web Batch” in the Software Protocol field.
- If “FTP Secured Batch” was chosen in step 11, indicate “FTP Secured Batch” in Software Protocol field.
- If both were chosen, indicate “Web Batch, FTP” in the software protocol field.
• Complete the required fields for EDI Billing Software Information at the top part of the screen.

![EDI Billing Software Information](image)

• Next complete the Software Vendor Contact Information on the bottom portion of the screen.

• To add an address, click the **Address** button.

![Software Vendor Contact Information](image)

• ProviderOne displays the Address details form.

• Complete the following fields:
  - Address line 1
  - Address line 2
  - Zip code

• Click on the **Validate Address** button.

![Address details](image)
If the address entered is not located when the validate address button is clicked, the following error will appear at the top of the page:

Correct the address and click the Validate Address button again.

If the error message comes up again, click Ok. ProviderOne can override the error by clicking the Ok button and the following pop up window will be displayed.

Click Ok on this pop up message and ProviderOne will save the information.
• After completing the form, click the **Ok** button to save the information and close the window or **Cancel** to close the window without saving.

### Add EDI Billing Software Information

<table>
<thead>
<tr>
<th>Software Vendor Company Name</th>
<th>PRU TEST FAI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Product Name</td>
<td>PRU TEST FAI</td>
</tr>
<tr>
<td>Software Protocol</td>
<td>WEB BATCH, FTP</td>
</tr>
<tr>
<td>Software Version</td>
<td>1.0</td>
</tr>
</tbody>
</table>

*See the note at the bottom of the page.*

**Segment Delimiter:**
- TID – Default Delimiter – (tab)
- Sub-element Delimiter:
  - colon: Default Delimiter – (colon)

### Software Vendor Contact Information

<table>
<thead>
<tr>
<th>Contact Title</th>
<th>PRU TEST FAI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact First Name</td>
<td>PRU</td>
</tr>
<tr>
<td>Phone Number</td>
<td>(800) 563-3623</td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
</tbody>
</table>

**Address 1:** 1234 Main
**City:** Olympia
**State/Province:** Washington
**Country:** United States
**Zip Code:** 98504

**Address 2:**
**Note:**
- If Web Batch was chosen in step 10, indicate “Web Batch” in the Software Protocol field.
- If “FTP Secured Batch” was chosen in step 10, indicate “FTP Secured Batch” in Software Protocol field.
- If both were chosen, indicate “Web Batch, FTP” in the software protocol field.

### Modifying an EDI billing software record

From the EDI Billing Software Information list:

• Click the hyperlink in the Software Name Column.
• ProviderOne displays the Manage EDI Billing Software Information page.

• After making your changes, click the **Save** button to save and the **Close** button to exit the screen.

## Deleting a billing software record

From the EDI Billing Software Information list:

• Check the box next to the record you want to delete and click the **Delete** button.

• From the EDI Billing Software Information list, click the **Close** button and proceed to the next step in the BPW.

• ProviderOne displays the Business Process Wizard. The status is now set to Complete.
Add EDI submitter details

Accessing the billing agent/clearinghouse/submitter list
From the BPW:

- Click the Add EDI Submitter Details link.

  **Step 12: Add EDI Submitter Details**

- ProviderOne displays the Billing Agent/Clearinghouse/Submitter List. The first time this list displays it will be blank.

Associate a billing agent/clearinghouse

- To add a new record, click the Add button.

- ProviderOne displays the Associate Billing Agent/Clearinghouse page.
• A Transaction Response type can be assigned to only one submitter.

• After entering a Billing Agent/Clearinghouse ProviderOne ID and a **Start Date**, the **End Date** should prepopulate with 12/31/2999.

• Change the Authorized column to **Yes** for each transaction you wish to assign to the submitter.

• Enter a **Start Date** and an **End Date**. An end date must be entered for each selected transaction.
  
  o **These dates must match the dates entered at the top of this page.**
  
  The end date can be 12/31/2999.

• When you are finished, click the **Ok** button to save.

---

**Modifying an EDI billing agent/clearinghouse submitter record**

From the EDI Billing Agent/Clearinghouse/Submitter List:

• Click the hyperlink in the ProviderOne ID column.

---

• ProviderOne displays the Manage Billing Agent/Clearinghouse page.
After making your changes, click the **Save** button to save and the **Close** button to exit the screen.

---

Deleting an EDI billing agent/clearinghouse submitter record

From the EDI Contact Information List:

- Check the box next to the record you want to delete and click the **Delete** button.
- Click the **Close** button and proceed to the next step in the BPW.

---

ProviderOne returns to the Business Process Wizard. The status is now set to complete.
Add EDI contact information

Accessing the EDI contact list
From the BPW:

- Click the **Add EDI Contact Information** link.

**Step 13: Add EDI Contact Information**

- ProviderOne displays the EDI Contact Information List.
- The first time this list displays it will be blank.

Add an EDI contact

- To add a new record, click the **Add** button.

**ProviderOne displays the Add EDI Contact Information page.**

- Complete all required fields.
• Click the **Address** button.

![Address Details](image)

• Complete the Address fields as shown above on pages 36 and 37.

• After creating the contact, assign transactions that you want them to receive or submit on your behalf.

• Highlight a transaction in the **Available Transactions** window and click the arrow to move them to the **Associated Transactions** window.
- Once the transactions are assigned, click the **Ok** button.

**Modifying an EDI contact**

From the EDI Contact Information List:

- Click the hyperlink in the Contact Title column.
• ProviderOne displays the Manage EDI Contact Information page.

• After making your changes, click **Save** button to save and the **Close** button to exit the screen.

![Manage EDI Contact Information](image)

**Deleting an EDI contact record**

From the EDI Contact Information List:

• Check the box next to the record you want to delete and click the **Delete** button.

![EDI Contact Information List](image)

• From the EDI Contact Information List, click the **Close** button and proceed to the next step in the BPW.

• ProviderOne displays the BPW. The status is now set to Complete.

![BPW](image)
Add servicing provider information

Accessing the servicing providers list
From the BPW:

- Click the **Add Servicing Provider** Information link.

**Step 14: Add Servicing Provider Information**

- ProviderOne displays the Servicing Providers List.
- The first time this list displays it will be blank.

Adding a servicing provider
- To add a new record, click the **Add** button.
• ProviderOne displays the Associate Servicing Provider page.
• Enter the required information for SSN or FEIN, NPI and/or Domain ID, and a start date.

• Click the **Confirm Provider** button. ProviderOne validates the servicing provider is enrolled in the system. If they are, the Available Agencies box will be populated using the agency entered for that provider.
• Click the available agency (or agencies) and use the double right arrow button to move it to the Selected Agencies box.
  • An error message will post if the agency chosen for the servicing provider does not match the agency noted for the group provider.
  • Once the agency is selected, the Available Taxonomies will display for this servicing provider. Use the double right arrow to move them to the Selected Taxonomies box.
  • Once the taxonomies are selected, the Available Locations will display for this servicing provider. Use the double right arrow to move them to the Selected Locations box.
  • Servicing providers must be associated to the specific billing provider location(s) they are providing services for.

  • Click the Ok button.

  • After clicking the Ok button, the system returns to the Servicing Providers list page with the servicing provider added.
If the provider does not exist in the database
If the provider does not exist in the database, you will be prompted to add the servicing provider. See the user manual Enroll a servicing provider for more information.

If a new enrollment is started, copy the application ID that is generated for the servicing provider. If you exit the servicing application prior to completion, you will need this number to access and complete the servicing application.

- Click **Ok** to start the enrollment process, **Back** to return to the previous page, or **Cancel** to return to the Servicing Provider List.

Modifying a servicing provider record
From the Servicing Providers List:

- Click the link in the Servicing Provider SSN/FEIN column.
• ProviderOne displays the Manage Servicing Provider Association page.

Active Servicing Provider:

Servicing Provider – Enrollment process started but not completed:

**Please note.** Modifying a servicing provider association cannot be completed until the servicing provider is approved.

• After making your changes, click the Save button or the Close button to close the window without saving.
Deleting a servicing provider

From the Servicing Providers List:

- Check the box next to the record you want to delete and click the **Delete** button.
  - This will delete the association between the servicing provider and the group but does not delete the servicing provider record from ProviderOne.

- From the Servicing Providers List, click the **Close** button and proceed to the next step in the BPW.

- ProviderOne displays the BPW. The status is now set to Complete.
Add payment and remittance details

Accessing the add payment and remittance details

From the BPW:

- Click the Add Payment and Remittance Details link.

| Step 15: Add Payment and Remittance Details |

- ProviderOne displays the Payment Details and the 835 Electronic Remittance Advice Information page.
- The first time this list displays it will be blank.
- Provider payment methods are only added to the base location.

Adding a payment method

To add a new record:

- Click the Add button.
• ProviderOne displays the Payment Details and Electronic Remittance Advice Information screen.

• Selecting Electronic Funds Transfer (EFT) displays the EFT Details.

• Financial Institution Routing Number must start with a 0, 1, 2, or 3.

• The Email Notification Preference cannot be selected if the email address has not been defined for the location.

• Click the **Ok** button to save the information and close the window, or **Cancel** to close the window without saving.

  ![Image](image)

  ![Image](image)

• ProviderOne validates the information entered, saves, and returns to the Payment Details and Electronic Remittance Advice Information page.

**Modifying payment detail and electronic remittance advice information**

From the Payment Details and Electronic Remittance Advice Information page:

• Click the link for the location you want to modify in the Location Number column.
- ProviderOne displays the Payment Details and Electronic Remittance Advice Information page for this location.
- This page allows the payment method to be edited for the location listed.
- If changing from EFT to paper check, the EFT detail area will be collapsed and not viewable.

![Provider Information]

- When changing from EFT to paper, all information pertaining to the EFT for this location will be lost and a pop up window will appear.
- After making your changes, click the **Ok** button to save or the **Cancel** button to close the window without saving.
Deleting a payment method record
From the Payment Details list:

- Check the box next to the record you want to delete and click the **Delete** button. The data will be removed from the enrollment staging area and will not be written to the ProviderOne database.

- From the Payment Details and Electronic Remittance Advice Information page, click the **Close** button and proceed to the next step in the BPW.

- ProviderOne displays the BPW. The status is now set to Complete.
Accessing the enrollment checklist

From the BPW:

- Click the **Complete Enrollment Checklist** link.

**Step 16: Complete Enrollment Checklist**

- ProviderOne displays the Provider Checklist.
- Every question must be answered with **Yes** or **No**.
- All Yes questions must also have a corresponding comment.
- After completing the Provider Checklist, click the **Save** button.

![Provider Checklist](image)

- ProviderOne displays the BPW. The status is now set to complete.
Submit enrollment application for review

Accessing the final enrollment instructions page

From the BPW:

- Click the Final Enrollment Instructions link.

**Step 17: Final Enrollment Instructions**

- ProviderOne displays the Final Submission page and Application Document Checklist.

- Prior to the final submission of the enrollment application, you must submit the required documentation by using the Upload Attachments button.
  - For specific requirements and instructions on uploading attachments, access How to Upload Attachments in ProviderOne resource.
Submitting the enrollment application
From the Final Submission page:

- Click the **Submit Enrollment** button.

- ProviderOne displays a confirmation pop up message.
- Click **Ok** to close the message.
- Click **Close** on the Final Submission page.
- Back on the BPW, Step 17 is marked complete.
- The enrollment is submitted with all required steps showing complete.

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<th>Step</th>
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<th>End Date</th>
<th>Status</th>
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