ProviderOne provider user manual

Enrolling as a group 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 a group provider

A group provider is an organization of individual providers who offer dental or other services. The following ProviderOne topics and tasks are covered in this section:

- Accessing the enrollment business process wizard
- 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.waproviderone.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:

![Complete your enrollment button](image)

Resume or track an enrollment application by accessing:
https://www.waproviderone.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.

There are two different ways of enrolling as a provider in ProviderOne, using an FEIN or SSN.

- If your organization is identified by an FEIN, select the FEIN radio button.
  - 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.
- If your organization is identified by a SSN, select the SSN radio button.
The screen will disable the FEIN area and allow entry into the SSN fields.

- Enter the **Provider Name, Middle Name** and **Last** and complete **SSN, Suffix, Gender, Title** dropdowns, and **DOB** field.
- For the Servicing Type dropdown, choose **Regular Provider**.

- Complete the bottom portion of the basic information page:
  - Enter **Yes** to the question using the dropdown if you are mandated to have a Federal NPI number.
  - Enter the **NPI**.
  - Do **not** enter a UBI in this step.
  - 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.
  
  o 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.

![Image of ProviderOne displaying Basic Information and Next button]

• ProviderOne displays the provider enrollment BPW.

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

![Image of ProviderOne displaying Business Process Wizard: Provider Enrollment (Group Practice) with status Complete]

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

<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>01/14/2020</td>
<td>01/14/2020</td>
<td>Complete</td>
</tr>
<tr>
<td>Required</td>
<td></td>
<td></td>
<td>Incomplete</td>
</tr>
</tbody>
</table>
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 access the location information list, click the Add button.

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](image)

• 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:

  ![Address Not Found Error](image)

• 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.

  ![Message from Webpage](image)

• Click **Ok** on the popup to save the address.
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.

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.

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.
• 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.

• 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 steps 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](image)

- 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.

![Mailing Address](image)

**Modifying a location record**

From the Locations List:

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

![Location Number](image)

- 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.

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.

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**

From the Locations List:

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

![Location Number](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 specialty to a location, select the appropriate one from the Location drop down.
  o At least one specialty must be selected and added to each provider location.
  o Select All from the dropdown if the specialties will be performed in all locations associated to your domain.

• 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.

• Entries for type and specialty 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.
- ProviderOne validates the information entered, saves, and returns to the Specialty/Subspecialty List.

<table>
<thead>
<tr>
<th>Provider Type</th>
<th>Specialty/Subspecialty</th>
<th>Location Number</th>
<th>Location Name</th>
<th>Administration</th>
<th>Cost Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>28 Respiratory, Developmental, Rehabilitation and Restorative Service Providers</td>
<td>79-Respiratory Therapy, Critical Care</td>
<td>0801</td>
<td>MD TEST</td>
<td>WSA</td>
<td>12/31/2099</td>
</tr>
</tbody>
</table>
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.

- 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.

- 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 drop-downs.
• 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.

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

![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.

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 #</th>
<th>License/Certification Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ 123456</td>
<td>Business License</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.
• ProviderOne displays the BPW. The status is now set to Complete.

| Step 5: Add Licenses and Certifications | Required | 01/15/2020 | 01/15/2020 | 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.

- 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.

- ProviderOne returns to the Federal Tax Details list.
Modifying a tax form record
From the Federal Tax Details list:

- Click the link of the form you wish to modify.

```
<table>
<thead>
<tr>
<th>Federal Tax Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRS Form W-9 information is required for all Providers. Please ensure that your Form W-9 Information is accurate optional Form W-4 and W-5 information.</td>
</tr>
<tr>
<td>[ ] W-9 Form</td>
</tr>
</tbody>
</table>
```

- ProviderOne displays the appropriate tax form page.

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

```
<table>
<thead>
<tr>
<th>Form W-9</th>
</tr>
</thead>
<tbody>
<tr>
<td>To update/correct the data in the disabled fields, please go back to Basic Information step.</td>
</tr>
<tr>
<td>Legal Name: TEST GROUP</td>
</tr>
<tr>
<td>SSN/FIN: 11-122333</td>
</tr>
<tr>
<td>W-9 Entity Type: Corporation</td>
</tr>
<tr>
<td>Business Name:</td>
</tr>
<tr>
<td>Exempt from Backup Withholding:</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>Location: SELECT...</td>
</tr>
<tr>
<td>Address Line 1:</td>
</tr>
<tr>
<td>Address Line 2:</td>
</tr>
<tr>
<td>Address Line 3:</td>
</tr>
<tr>
<td>State/Province:</td>
</tr>
<tr>
<td>Country:</td>
</tr>
<tr>
<td>Zip Code:</td>
</tr>
<tr>
<td>Phone Number:</td>
</tr>
<tr>
<td>OK</td>
</tr>
</tbody>
</table>
```

Deleting a tax form record
Adding Federal tax details is required for all payable providers. The system will not let you delete this form.

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

```
<table>
<thead>
<tr>
<th>Federal Tax Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRS Form W-9 information is required for all Providers. Please ensure that your Form W-9 Information is accurate optional Form W-4 and W-5 Information.</td>
</tr>
<tr>
<td>[ ] W-9 Form</td>
</tr>
</tbody>
</table>
```

- 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.

```
<table>
<thead>
<tr>
<th>Mode of Submission</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Batch</td>
<td>For upload/download of files in ProviderOne</td>
</tr>
<tr>
<td>Billing Agent/Clearinghouse</td>
<td>For providers who use a 3rd party to bill</td>
</tr>
<tr>
<td>FTP Batch</td>
<td>For submitting files via an FTP site</td>
</tr>
<tr>
<td>Web Interactive</td>
<td>For entering (buying) claims directly in ProviderOne</td>
</tr>
</tbody>
</table>
```

- Your EDI submission method is "Web Batch" if you currently upload and download batch files using WebMedWeb. 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 Secured Batch" if you submit and retrieve batches at a secure web server assigned to you by DHHS. 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.
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.
ENROLLING AS A GROUP PROVIDER

• Complete the required fields for EDI Billing Software Information at the top part of the screen:

  ![EDI Billing Software Information](image1)

  - Software Vendor Company Name
  - Software Product Name
  - Software Protocol
  - Software Version

  • Element Delimiter
  • Segment Delimiter
  • Sub-Element Delimiter

• 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](image2)

  - Contact Title
  - Contact First Name
  - Contact Last Name
  - Phone Number
  - Email Address
  - Address Line 1
  - Address Line 2
  - Address Line 3
  - State/Province
  - Country
  - Zip Code

  **Note:**
  - 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.

• 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](image3)
• 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:

![Address details](image)

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

**Element Delimiter:** Acrobat - Default Delimiter - (a)brakets  
**Segment Delimiter:** Title - Default Delimiter - ( )brakets  
**Sub-Element Delimiter:**icolon- - Default Delimiter - ( ;)brakets

---

### Software Vendor Contact Information

<table>
<thead>
<tr>
<th>Contact Title</th>
<th>PRU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact First Name</td>
<td>PRU</td>
</tr>
<tr>
<td>Phone Number</td>
<td>(800) 562-3022</td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
<tr>
<td>Address Line 1</td>
<td>1234 MAIN</td>
</tr>
<tr>
<td>Address Line 2</td>
<td></td>
</tr>
<tr>
<td>Address Line 3</td>
<td></td>
</tr>
<tr>
<td>City/Town</td>
<td>Olympia</td>
</tr>
<tr>
<td>State/Province</td>
<td>Washington</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>Zip Code</td>
<td>98501</td>
</tr>
</tbody>
</table>

**Contact Last Name:** TEST  
**Fax Number:** |
**End Date:** |

**Note:**  
- 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.

---

### 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.

| Step 11: Add EDI Billing Software Details | Optional | 01/17/2020 | 01/17/2020 | 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.
  - 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 submitter record**

From the EDI Billing Software 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.
• Complete the Address fields as shown above on pages 36 and 37.

• Click Ok.

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 Save and Close button.
Modifying an EDI contact
From the EDI Contact Information List:

- Click the hyperlink in the Contact Name 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.

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.
- 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.

| Step 13: Add EDI Contact Information | Optional | 01/17/2020 | 01/17/2020 | Complete |
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 Servicing Provider Association 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. 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.
  
  o 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 under the Billing Provider Location area. Use the double right arrow to move them to the Selected Locations box.
  
  o 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.
  o 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](image)

- 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 NPI 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.

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.

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.
Complete enrollment checklist

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 Table](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.

![Final Submission](image)

• ProviderOne displays the BPW. Step 17 is now marked complete.

<table>
<thead>
<tr>
<th>Step 17: Final Enrollment Instructions</th>
<th>Required</th>
<th>Start Date</th>
<th>End Date</th>
<th>Notes</th>
<th>Step Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProviderOne displays the BPW. Step 17 is now marked complete.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• ProviderOne returns to the Business Process Wizard (BPW) enrollment page with all required steps marked complete.

![Business Process Wizard](image)