Introduction

The Medica Provider Portal is a secure website that allows providers and their billing agencies the ability to access important information and perform various online functions via a secure site. Most users not all will have access to the following functions within the site: check eligibility, verify member benefits, research claim status, referral entry, admission notification, claim adjustment, clinic demographic transactions, electronic payments and statements transaction, fee schedule lookup, provider search, referral status inquiry, online provider demographics update. The Primary Administrator adds additional users and assigns all of the functions to the appropriate users.

The Medica Provider Portal site is available 24/7.

Purpose

Primary administrators can use this guide to aid in registering secondary administrators, pro staff users, subsidiary organizations and delegate access to billing agencies for electronic transactions in a secure environment.

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## Definitions

<table>
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<th>Provider Organization</th>
<th>An organization that provides healthcare services to our members. Each federal tax identification number can be associated with only one provider organization.</th>
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| Subsidiary Organization | An organization can have only one main federal tax identification number. Additional federal tax identification numbers may be listed as subsidiary organizations.  
Example: ABC Clinic has two separate federal tax identification numbers. The primary administrator should register the organization’s main federal tax identification number and list the second federal tax identification number as a subsidiary organization. An organization can have as many subsidiary federal tax identification numbers as necessary. |
| Billing Agency          | A billing agency is contracted to a provider organization to conduct administrative duties, not limited to billing services. A care system associated with a provider organization can also function in this capacity.  
Billing agencies must register with their own federal tax identification number on medica.com in order to be delegated to by their contracted provider. |
| Delegation Relationship | Provider organizations may choose to delegate to a billing agency or care system. This will allow the delegate access to the provider’s electronic transactions on medica.com.  
Control of the delegation is owned by the primary administrator of a provider organization. This ensures the provider retains control of who has access to their online data as a safeguard against unintended exposure of financial and member information.  
Billing agencies cannot delegate to provider organizations or other billing agencies.  
A Billing Agency Delegation Example: ABC Clinic has contracted with XYZ Billing Agency. Both entities have registered on medica.com using their own business federal tax identification number. ABC Clinic can then delegate access to XYZ Billing Agency for selected electronic transactions on medica.com.  
Care System Example: ABC Clinic is a member of a care system. Referrals are managed through the care system. Both entities have registered on medica.com using their own business federal tax identification number. ABC Clinic can then delegate access to the care system for selected electronic transactions on medica.com. |
| **Primary Administrator** | Individual responsible for initiating the registration of a provider organization or billing agency and assigning rights to secondary administrator and staff users. Only one user can act as the organization’s primary administrator.  
Registration of the federal tax identification number will be disabled if the primary administrator has not created username and password within 180 days of the initial registration.  
See the “Primary Administrator Responsibilities” page for more information. |
| **Secondary Administrator** | Staff member with access to perform specific electronic transactions as assigned by primary administrator. Also has the ability to register and assign rights to staff users. |
| **Staff Users** | Staff member with access to perform specific electronic transactions as assigned by primary or secondary administrator. Individual physicians must be registered as provider staff to access their Premium Designation Program reports. |
| **Usernames** | Usernames must be between 6 and 20 alphabetical characters  
- Periods are allowed  
- Special characters ( *, $, #, @, etc.) not allowed  
- Spaces are not allowed  
Username example: dan.derm |
| **Passwords** | Passwords are case sensitive and be at least 8 characters in length with a combination of all of the following:  
- Upper and Lower Case Letters  
- Special Characters  
- Numbers  
Password example: K4mz*wy6 |
| **Inactive Registrations** | If the Primary Administrator has not created a username or password within 180 days of the initial registration, the Fed ID will be disabled and registration will have to start again.  
Any accounts that have been inactive for 90 days will have the password reset and will be disabled after 180 days of inactivity.  
Warning emails will be sent 10 days prior to action taken. |
Primary Administrator Responsibilities

Primary Administrator agrees to

- Click the check box for the Terms of Use on the registration page, thereby agreeing to:
  - Abide by terms of registration, as outlined in the Terms of Use section
  - Create a username or password within 180 days of the initial registration, if not the Fed ID will be disabled and registration will have to start again.
  - Advise all users that they are bound by terms of registration, as outlined in the Terms of Use section
  - Register only staff who have legitimate need to use the secure electronic transactions on medica.com
  - Allow access only to information user requires to perform his/her job responsibilities
  - Monitor and disable former users access to the secured portions of medica.com for both staff and delegated users

- Register and assign access to secondary administrators

- Register and assign access to staff
  - Secondary administrator may also register and assign access for staff users

Special Note

There should preferably be more than one registered user for the account.

- Disable registration when staff leave the organization

- Delegate rights to contracted billing agencies, if necessary

- Delegate rights to associated care systems, if necessary

- Disable access for delegated billing agencies and care systems, if necessary

- Notify the Medica.com portal administrator if the federal tax identification number changes or new federal tax identification number(s) need to be added

- Receive email notifications if:
  - Staff's account is locked due to unsuccessful attempts to login
Registering a Secondary Administrator or Staff User

Background
The following table shows who can register whom:

<table>
<thead>
<tr>
<th>Security Role</th>
<th>They can register:</th>
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<tbody>
<tr>
<td>Primary Administrator</td>
<td>Secondary Administrators and Staff Users</td>
</tr>
<tr>
<td>Secondary Administrators</td>
<td>Staff Users</td>
</tr>
<tr>
<td>Staff Users</td>
<td>None</td>
</tr>
</tbody>
</table>

Special Note
There should preferably be more than one registered user for the account. Any accounts that have been inactive for 90 days will have the password reset and will be disabled after 180 days of inactivity.

Instructions
1. Primary Administrator opens to medica.com > For Providers (drop down menu) > Electronic transactions and logs into their personal account using their username and password.

Special Note
Online tools are available
- Forgot password or username
- Frequently Asked Questions
- Email us at PortalRegistration@medica.com
2. Click on the “Manage your account” link

3. Click on “Register a new user”
Registering a Secondary Administrator or Staff User (continued)

4. Complete the demographic information.
   - First Name - Secondary Administrator or Staff User’s First Name
   - Last Name - Secondary Administrator or Staff User’s Last Name
   - Address - Secondary Administrator or Staff User’s Address
   - City - Secondary Administrator or Staff User’s City
   - State - Secondary Administrator or Staff User’s State
   - Zip Code - Secondary Administrator or Staff User’s Zip Code
   - Phone Number - Secondary Administrator or Staff User’s Phone Number
   - Email Address - Secondary Administrator or Staff User’s Work Email
   - Retype Email - Secondary Administrator or Staff User’s Work Email
   - Job Function - Secondary Administrator or Staff User’s Function or Title

5. Select one of the two Security Role options
   a. Secondary Administrator
   b. Staff User

Special Note
Individual physicians accessing their Premium Designation Program reports must be registered as provider staff. It is not necessary to select any electronic transactions for the physician, simply click on the submit button.

6. In the “Authorized Transactions” list, select only the access the user requires to perform his/her job responsibilities, remembering that some transactions contain Protected Health Information (PHI). Choose “select all” if the user should have access to all transactions.
Special Note
The organization not Medica, controls who has access to secured transactions on medica.com.

7. In the “Authorized Fed Tax IDs” field, select only the associated federal tax identification numbers to which the user should have access. Choose “select all” if the user should have access to all associated federal tax identification numbers.

Special Note
The user will have access to the same assigned transactions for all Federal Tax Identification numbers.

8. Upon completion of the electronic registration form, click the Submit button. A message will appear advising that the registration was successful.

Provider Registration
The initial registration phase was successful.

9. PortalRegistration@medica.com will notify, via email, the newly registered user. The email will include a link for the new user to create a password and username. The link will not expire but it can only be used once.

10. The new user should create a username and password as explained on Pages 10 and 11.

Special Note
If a registration notification needs to be resent to a user, click “resend registration notice” at the lower right corner of the new user’s registration page.
Using the Search Function

Four search options are available

- Person Name: all users registered by that name
- Username: all users registered using that username
- Organization Name: all users registered under that entity’s name
- Federal Tax Identification Number: all users registered under that federal tax identification number

1. Enter the value to search with
   - Click the ‘Search’ button

2. Sort by headers to refine results

3. Double click on the correct Last Name

4. Update access as necessary

5. Click Submit button
Adding Subsidiary Organization

Background
Providers can add an unlimited number of additional federal tax identification numbers that are associated with the main entities federal tax identification numbers as subsidiary organizations.

Special Note
Subsidiary organizations will be verified before they are added to your account. Please allow 2 business days before access to these organization is available.

Instructions
1. Primary Administrator opens to medica.com > For Providers (drop down menu) > Electronic transactions and logs into their personal account using their username and password.

2. Click on the Add subsidiary organization link.

3. Add the Fed tax ID and the Organization Name then hit the Add Subsidiary Organization button to continue adding more organizations.

Extra rows can be deleted (before submitting) by choosing “Remove” button.

4. Wait for a confirm email that the subsidiary organization have been added to your account.
Delegating Access to Electronic Transactions

Background
Provider organizations may delegate to a contracted billing agency access on medica.com to electronic transactions for the provider's federal tax identification numbers.

Billing agencies must be registered with their own federal tax identification number on medica.com in order to be delegated to.

Billing agencies cannot delegate to provider organizations or other billing agencies.

For registration purposes, care systems associated with a provider organization functions the same as a billing agency.

Information Needed
Billing agency name or federal tax identification number

Instructions
1. Primary Administrator opens to medica.com > For Providers (drop down menu) > Electronic transactions and logs into their personal account using their username and password.

Special Note
Online tools are available
- Forgot password or username
- Frequently Asked Questions
- Email us at PortalRegistration@medica.com
Delegating Access to Electronic Transactions (continued)

1. Click on the “Manage your account” link:

2. Click on “Assign Rights to a Billing Agency”

4. Search for the Billing Agency. Two search options are available
   - Organization Name
   - Organization Federal Tax Identification Number
Delegating Access to Electronic Transactions (continued)

5. Enter the value to search with and click Search button

**Account Management**

<table>
<thead>
<tr>
<th>Org name</th>
<th>Fed tax ID</th>
<th>Org type</th>
<th>Search</th>
</tr>
</thead>
</table>

**Special Note**
Only Billing Agencies that have registered with their own Fed ID on medica.com will be eligible for delegation. If the organization has not registered, they will not appear in the search results.

6. Sort by headers to refine results

7. Double click on the correct Organization name to open

8. Select transaction(s) and Fed ID(s) to be delegated

9. Click the Submit button

**Account Management**

**Billing Organization**

* Required Fields

**Organizational Information**

* Organization Name

Primary admin

Disable Organization

☐ Disabling an organization will disable all associated users.

**Billing specific organization data**

* Federal Tax ID

Submit

A message will appear confirming that the delegation was successful.
10. **PortalRegistration@medica.com** will notify the primary administrator of the billing agency, via an automated email, that the provider organization has delegated access to specific federal tax identification numbers and electronic transactions.

11. Primary Administrator of the Billing Agency will need to refresh their access.
Refreshing Access

**Background:**
Users will need to refresh their account to access newly added transactions. Billing agencies need to refresh their account to gain access to new provider clients.

**Instructions**
1. Open medica.com > For Providers (drop down menu) > Electronic Transactions and login using your registration username and password >Manage your account

2. Select Edit your Account if refreshing the Primary Administrator access

3. Click the Submit button in the lower left corner. This will update the primary administrator’s access to the new transactions or Federal Tax Identification numbers.

**Special Note**
The Electronic Payments and Statements Transaction require additional time to pass the users security information through several systems. Please wait an additional 30 minutes before attempting to use the transaction.
4. Select Edit Another User’s Account if the primary administrator is refreshing Secondary Administrators or Staff User’s access.

5. Use a search method as explained on page 17.

6. Update only the access on “Authorized Transactions” list the user requires to perform his/her job responsibilities, remembering that some transactions contain protected health information (PHI).

Special Note
7. The organization, not Medica, controls who has access to secured electronic transactions on medica.com.

8. Click on the Submit button to save changes.
<table>
<thead>
<tr>
<th>Topic</th>
<th>Location</th>
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<td>Electronic Transactions: <strong>Forgot password</strong>  <strong>Forgot username</strong>  <strong>Frequently Asked Questions</strong></td>
<td>Medica.com at For Providers&gt;Electronic Transactions&gt;Provider Login</td>
</tr>
<tr>
<td>Electronic Commerce:  • <strong>Electronic Transactions - Eligibility Inquiry Helpful Hints</strong></td>
<td>Medica.com at For Providers&gt;Administrative Resources&gt;Electronic Commerce</td>
</tr>
<tr>
<td>Electronic Payments and Statements:  • <strong>How to Register</strong>  • <strong>EFT Enrollment Authorization Agreement for Optum</strong>  • <strong>NPI Enrollment Addendum for Optum</strong>  • <strong>PRA Copy Request Form</strong></td>
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<td>User Guides:  • <strong>Electronic billing tool for small providers</strong>  • <strong>Medica Electronic Transactions</strong>  • <strong>Provider Demographic-Update Online Tool (PDOT)</strong>  • <strong>Provider Portal Registration for Primary and Secondary Administrators</strong></td>
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<td>User Logins:  • <strong>Emdeon Office enrollment</strong>  • <strong>Medica Electronic Transactions</strong>  • <strong>MN E-Connect</strong></td>
<td></td>
</tr>
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<td>Need to know who your Primary or Secondary Administrator is?</td>
<td>Call the Medica Provider Service Center at: 1-800-458-5512</td>
</tr>
<tr>
<td>Username/Password issues or if unable to login</td>
<td>Review the <strong>Frequently Asked Questions</strong> or email <strong><a href="mailto:PortalRegistration@medica.com">PortalRegistration@medica.com</a></strong></td>
</tr>
</tbody>
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