User Guide for Provider Demographic update Online Tool (PDOT)

PDOT allows Provider Primary and Secondary Administrators to:

- Add currently credentialed practitioners to sites
- Terminate practitioners from sites
- Update site demographics for:
  - Billing address
  - Care delivery site address
  - Directory address
  - Check name
  - Care delivery site name
  - Federal tax identification number (TIN)
- Add sites
- Terminate sites
- Add Personal Care Assistants (PCA) to agencies
- Terminate Personal Care Assistants (PCA) from agencies
- Change demographics for Personal Care Assistants (PCA)
- Change demographics for PCA Agencies

If you are not registered on Medica’s website, www.medica.com, click here to register.

Please contact Medica Contract Management to submit the proper documents to ensure claims payment accuracy for the following changes:

- Total Contract Terminations
- Care System or Care Grouping Changes
- Merger Acquisition Activities

If you have questions, please contact Medica Provider Service Center at 1-800-458-5512.
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<th>Page(s)</th>
</tr>
</thead>
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</tr>
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<td>10-13</td>
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<td>34-36</td>
</tr>
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1. Click “For Providers” drop down menu

![Medica Website Screenshot](image1.png)

2. Click “Electronic Transactions”
3. Enter personalized Username and Password on Provider Login Screen

![Provider Login](https://via.placeholder.com/150)

The Primary Administrator is required to create a username and password within 180 days of the initial registration. If not completed, the federal tax identification number will be disabled and registration will have to start again. Inactive user accounts will have the password reset at 90 days and will be disabled after 180 days of inactivity.

Warning emails will be sent 10 days prior to any action taken.

Need help? Click on the links found on lower right corner

4. Click “Online Provider Demographic Update Tools” link available only for Primary and Secondary Administrators
5. Enter the entity’s Federal Tax Identification Number on the Provider TIN Search screen, and click “search” button

6. View the clinic demographics on the Clinic List screen

Columns can be sorted alphabetically or numerically by clicking on headers
1. Click “View Practitioners” link on Clinic List screen

![Clinic List](image1)

1. Click “Add Practitioner” button on the Practitioner List screen

![Practitioner List](image2)
2. Enter information on the Practitioner Search screen, and click “search” button

![Practitioner Search Screen](image)

Add Currently Credentialed Practitioner to a Site (cont’d)

3. Click “Add” link on the Search Results

![Search Results Table](image)
Add Currently Credentialed Practitioner to a Site (cont’d)

4. Enter information in required fields on the Add Practitioner screen

* Required Fields

Missing information in required fields will prevent submission

5. Confirm addition of the practitioner
6. Review the Add Practitioner Confirmation screen

![Add Practitioner Confirmation screen](image)

You have added the following practitioner:

- **First Name:** Bryan
- **Last Name:** Remer
- **Title:** MD, General Practice
- **NPI:** 0987654321
- **UMPI:** 04532017
- **Accepting New Patients:** Yes
- **Termination Date:**
- **Termination Reason:**
- **Suppression from Directory:** No
- **Added to Site:**
- **Clinic Name:** Ben's Clinic
- **Address:** 123 Oak, His Town, MN 123456-7879
- **Federal Tax ID:** 12-3456789

You will receive a confirmation email shortly. Thank you.
1. Click “View Practitioners” link on Clinic List screen

2. Click “Term” link on the Practitioner List screen
3. Enter information in required fields on Terminate Practitioner screen and
   o click “Total Term” button (remove practitioner from all sites under Federal Tax ID)
   or
   o click “Terminate Practitioner” button (remove practitioner only from this site)

   **Required field**

   Missing information in required fields will prevent submission
4. Confirm termination of a practitioner

Or
5. Review the Term Practitioner Confirmation screen

Terminated from all sites within Fed ID: 12-3456789
You will receive a confirmation email shortly. Thank You.

Back to Practitioner List
1. Click “View Addresses” on Clinic List screen
2. Review information on Clinic Address Change screen

3. Click “Edit” button on Clinic Address Change screen to update information if necessary and click “Update Address” button when completed
(Page continued)

<table>
<thead>
<tr>
<th>His Town</th>
<th>His Town</th>
<th>His Town</th>
</tr>
</thead>
<tbody>
<tr>
<td>State:</td>
<td>State:</td>
<td>State:</td>
</tr>
<tr>
<td>MN</td>
<td>MN</td>
<td>MN</td>
</tr>
<tr>
<td>ZIP:</td>
<td>ZIP:</td>
<td>ZIP:</td>
</tr>
<tr>
<td>12345-6780</td>
<td>12345-6789</td>
<td>12345-6789</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone Number:</th>
<th>Phone Number:</th>
<th>Phone Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>123-123-1234</td>
<td>123-123-1234</td>
<td>123-123-1234</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fax Number:</th>
<th>Fax Number:</th>
<th>Fax Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>789-789-7897</td>
<td>789-789-7897</td>
<td>789-789-7897</td>
</tr>
</tbody>
</table>

No changes entered will result in return to Clinic Address Change screen
4. Confirm demographic change(s)

![Message from webpage](image)

Are you sure you want to submit your changes?

OK  Cancel

5. Review the Address Change Confirmation screen

![Address Change Confirmation](image)

You have made the following address changes for care delivery site:

<table>
<thead>
<tr>
<th>New Billing Address</th>
<th>Old Billing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic Name:</td>
<td>Clinic Name:</td>
</tr>
<tr>
<td>Bryan's Eyecare Center</td>
<td>Bryan's Eyecare Center</td>
</tr>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
<tr>
<td>456 Elm, His City, MN</td>
<td>456 Elm, His City, MN</td>
</tr>
<tr>
<td>Federal Tax ID:</td>
<td>Federal Tax ID:</td>
</tr>
<tr>
<td>NPI:</td>
<td>NPI:</td>
</tr>
<tr>
<td>4112345678</td>
<td>4112345678</td>
</tr>
<tr>
<td>Address Change Effective Date:</td>
<td>Address Change Effective Date:</td>
</tr>
<tr>
<td>11/01/2012</td>
<td>11/01/2012</td>
</tr>
</tbody>
</table>

You will receive a confirmation email shortly. Thank You.
1. Click “Add Clinic” button on the Clinic List screen

Columns can be sorted alphabetically or numerically by clicking on headers

2. Select a Federal Tax Identification Number from the drop down list

Only associated Fed Tax IDs will be viewable
3. Enter information in the required fields and click the “save clinic” button

<table>
<thead>
<tr>
<th>Care Delivery Site Address</th>
<th>Billing Address</th>
<th>Directory Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same as CDS Address:</td>
<td>Same as CDS Address:</td>
<td>Directory Site Name:</td>
</tr>
<tr>
<td>Care of Name:</td>
<td>Care of Name:</td>
<td>Directory site Name:</td>
</tr>
<tr>
<td></td>
<td>Building Name:</td>
<td></td>
</tr>
<tr>
<td>Street Address:</td>
<td>Street Address:</td>
<td>Street Address:</td>
</tr>
<tr>
<td>PO Box/Other:</td>
<td>PO Box/Other:</td>
<td>PO Box/Other:</td>
</tr>
<tr>
<td>City:</td>
<td>City:</td>
<td>City:</td>
</tr>
<tr>
<td>State:</td>
<td>State:</td>
<td>State:</td>
</tr>
<tr>
<td>Zip:</td>
<td>Zip:</td>
<td>Zip:</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>Phone Number:</td>
<td>Phone Number:</td>
</tr>
<tr>
<td>Fax Number:</td>
<td>Fax Number:</td>
<td>Fax Number:</td>
</tr>
</tbody>
</table>

Missing information in required fields will prevent submission
4. The Site Add Confirmation Screen will appear

![Add a Clinic]

You have completed the below Clinic Add. Please click the 'Add Practicioners' button to add practitioners to this Clinic. If there are no practitioners, click View Clinic List to go back to the list of Clinics.

5. Click “Add Practitioner” button at the bottom of the page to add all practitioners active at that site. Reference instructions on pages 6-9.

The system will not allow practitioners to be added to facilities such as Hospital, SNF, DME, etc.
1. Click “Term Clinic” link on Clinic List screen

Columns can be sorted alphabetically or numerically by clicking on headers
2. Enter information in the required fields and click the “Terminate Clinic” button

Terminate a Clinic

Care Delivery Site Name: Ben’s Clinic

Care Delivery Site Address: 123 Oak, His Tow, MN 12345-6789

* Term Date:  

* Term Reason:  

Other Reason:  

Clinic Term Letter: Browse...

Please attach a sample of the communication that was sent to members regarding the closing of this site.

* Required field

Missing information in required fields will prevent submission

3. Confirm the clinic termination

Message from webpage

By terminating this clinic you will also be terminating all practitioners from this clinic. Are you sure you want to proceed?

OK Cancel
4. Review the Term Clinic Confirmation screen

You will receive a confirmation email shortly. Thank you
Change a Federal Tax Identification Number

1. Click the “Change Federal Tax ID Information” button on the Clinic List screen

![Clinic List]

Columns can be sorted alphabetically or numerically by clicking on headers

2. Select a Federal Tax ID from the drop down list on the Change Federal Tax ID Info screen

![Change Federal Tax ID Info]

Only associated Fed Tax IDs will be viewable

* Required field
3. Enter information in the required fields.
4. Upload the necessary attachments (W9) and click the “Save” button

* Required field

Missing information in required fields or required documents will prevent submission

4. Confirm the Federal Tax Identification Number change

By updating the information on this page you will be updating the Federal Tax ID and or the Check Name information for the entire Federal Tax ID. If you need to update a subset of the Federal Tax ID please contact Medica’s Provider Service Center at 1-800-458-5512.
5. Review the Change Federal Tax ID Information Confirmation screen

You will receive a confirmation email shortly. Thank you
1. Enter personalized username and password on Login screen

2. Enter the entity’s Federal Tax Identification Number on the Provider TIN Search screen, and click “search” button
3. View the agency demographics on the Clinic List screen

Columns can be sorted alphabetically or numerically by clicking on headers

4. Click “View Practitioners” link on Clinic List screen to see all PCAs associated with agency
5. Click “Term” link on the Practitioner List screen to terminate a PCA from your agency or Federal Tax ID.

Refer instructions on pages 10-13 to terminate a practitioner.

6. Click “Edit PCA” to change demographic information of a PCA.
7. Change information as necessary

8. Click Save button
9. Click “Add PCA” to add PCA to agency

10. To add a PCA currently in our system, search using the PCA’s UMPI number
11. Enter information

12. Click “Save” button
13. To add a new PCA not currently in our system select “Add PCA”.
   • Enter information in required fields using Upper and Lower Case script
   • Verify the practitioner’s Social Security Number
   • Verify the spelling of practitioner’s name
   • Validate Federal Tax ID and UMPI/NPI number combination used

**Special Note:** WWW.Medica.com website must match the Federal Tax ID and UMPI/NPI number combination on file with DHS.
   • Click “Save”

Please do not submit claims until provider numbers for the requested PCA(s) are received from Medica via US Postal Service. Please review your agency’s online practitioner list to confirm if a provider number has been assigned.

After 30 days, please direct questions regarding the status of your request to the Medica Provider Service Center at 1-800-458-5512.
1. **Who has access to the PDOT application?** Only the Primary and Secondary Administrators registered on www.medica.com have the ability to make updates using PDOT.

2. **Is it necessary to use upper and lower case script?** Yes. Please take special care to enter the information using upper and lower case script, verify the practitioner’s Social Security Number, and the spelling of their name.

3. **What is the “View Practitioners” link for?** The “View Practitioners” link displays a list of practitioners currently associated with the site within the Medica claims system. From the practitioner list for a site, you can:
   - Terminate existing practitioner from the site
   - Add new practitioners. The practitioner being added must be credentialed with Medica. If the practitioner is not credentialed, you will need to submit the *Minnesota Uniform Credentialing Application* for the practitioner. See more on this form at medica.com.

4. **What is the “View Addresses” link for?** The “View Address” link displays:
   - Office Hours
   - Care Delivery Site address (physical location)
   - Check/Billing address
   - Directory address (this address can include a Building Name for easier identification by patients).
   From this screen, you can update the information that displays in directories and on the Find A Doctor Search Tool.

5. **What is the “Term Clinic” link for?** The “Term Clinic” link displays the Care Delivery Site Name(s) and Address(s) and provides the ability to terminate specific sites from the provider’s contract. Please contact your contract manager if the legal entity is terming.

6. **What is the “Add Clinic” button for?** The “Add Clinic” button provides the ability to add additional care delivery sites to the provider’s contract. Please add all practitioners active at that site, when applicable. Typically, the system will not allow practitioners to be added to facilities such as Hospital, SNF, DME, etc. After submitting a request electronically to Medica, providers should expect related system changes to take effect in 30 to 45 days. *However, to ensure that a change request for a site addition or termination is completed by the effective date, providers should notify Medica of the change 60 days in advance.*

7. **What is the “Change Federal Tax ID Information” button for?** The “Change Federal Tax ID Information” button provides the ability to change the entity’s legal name or Federal Tax ID. A W9 document is required to be uploaded.

8. **What is the “Edit PCA” link for?** The “Edit PCA” link provides the ability to change Personal Care Assistants’ demographic information. This option is limited to only the Personal Care Assistants.

9. **What is the difference between “Total Term” and “Terminate Practitioner” buttons?** The “Total Term” button will terminate the practitioner from all sites within the Federal Tax ID. The “Terminate Practitioner” button will terminate the practitioner from only one specific site.
10. **How do I add a PCA?** To add a PCA, open the “Clinic List” screen, click “View Practitioners” link, click “Add New PCA” button, search by UMPI number enter information, save.

   *Special Note: [WWW.Medica.com](http://WWW.Medica.com) website must match the Federal Tax ID and UMPI/NPI number combination on file with DHS.*

11. **Who should I contact if I have questions about what I see on the Provider Demographic Online Tool?** Please contact the Medica Provider Service Center at 1-800-458-5512.

12. **What is the Termination Date for on the Practitioner Add page?** A term date would be included in a practitioner add if the practitioner is a Locum Tenen or temporarily working at your site for a set length of time. The termination date should be populated with the last date the practitioner will be working at the site.

13. **I added a practitioner or made demographic changes to a site, and when I view the site again, I can’t see the updates.** You will not be able to see changes immediately in PDOT. Changes will be displayed after the load process is completed. If you have questions regarding changes that you have requested, please call the Medica Provider Service Center at 1-800-458-5512.

14. **It doesn’t look like I can update what I want here.** Please contact Medica Network Management by sending an e-mail to [NetManQuest@medica.com](mailto:NetManQuest@medica.com) regarding the following changes:
   - Total Contract Terminations
   - Care System or Care Grouping Changes
   - Merger Acquisition Activities

15. **How do I know if a practitioner is credentialed by Medica?** Practitioners displayed on the Practitioner Search Results screen are all currently credentialed and active in the Medica provider network. Not all practitioners are listed at all sites due to special agreements with individual providers.

16. **My practitioner is changing sites. What do I need to do?** Please complete a practitioner termination request for the site he is leaving and a practitioner add request for the new site he will be joining.

17. **Can I change a practitioner’s specialty?** Please complete a [Minnesota Uniform Practitioner Change Form](http://medica.com). See more about his form at [medica.com](http://medica.com).

18. **I termed the practitioner in error. Can I re-add the practitioner? Does the practitioner need to be re-credentialed?** Yes, you can re-add the practitioner. The Medica Credentialing Department will determine if re-credentialing is required.

19. **I made changes to a site in error. Can I undo the changes?** All site adds and terms are reviewed by the Network Management team prior to updating the contract. If you have made changes in error, please e-mail the Network Management department immediately at [NetManQuest@medica.com](mailto:NetManQuest@medica.com).

20. **I used the wrong term/effective date. Can I change the date I submitted?** For questions regarding entity changes submitted please contact Medica Network Management by e-mail at [NetManQuest@medica.com](mailto:NetManQuest@medica.com). For questions regarding practitioner changes submitted please contact Provider Network Operations by e-mail at [MedicaDemoResolution@medica.com](mailto:MedicaDemoResolution@medica.com).

21. **If I term a site, do I still have to submit terms for all the practitioners associated with that site?** No. when a site is termed in the system, Medica will terminate all the practitioners associated with that location.
22. I cannot see my practitioners at every site they work at. Why is this not displayed? The Medica system allows for the loading of a practitioner at one site for one Federal Tax ID. It is not necessary for Medica to list them for each site in order for providers to be set up for proper claims payment. If you do not see your practitioner at every site and have concerns about this, please contact the Medica Provider Service Center at 1-800-458-5512.

If you have questions, please contact Medica Provider Service Center at 1-800-458-5512.