Wellcare Provider Portal – Contract Admin –

Manage User How-To-Guide

Welcome to Contract Admin – Manage Users How-To-Guide!

You have been assigned as the Wellcare Provider Portal Contract Administrator (or Contract Admin for short.) This role lets you control all activity within the self-service provider portal as it pertains to your contract with Wellcare. The goal of this document is to help you understand your role and capabilities as Contract Admin as it pertains to managing users.

Why do you have this role?

One of the features of the new provider portal is the ability for the Contract Admin to control access to information by managing users' access and roles. This includes the ability to create various levels for users within the same account. Later in this document, you will find a more detailed description of available roles and their level of access. Some of the terms on the next few pages may be new. There is a definitions list at the end of this guide than can help, and you can also refer to the "Provider Portal Reference Guide" for information, but let's start with some basics about administrators:

There are Three Types of Admins

ROLE	DESCRIPTION
Contract Admin	This role has full administrator rights at the contract level. It can perform all services available in the portal and see all applicable data at the contract level (including all Sub-Group Account(s)' services and data). It can also grant and remove access for all users at the contract level and can create or dissolve Sub-Group Accounts. Each contract can have only one Contract Admin.

In addition to the Contract Admin role, we have created two additional types of administrative roles that a Contract Admin can assign to help in managing and assigning roles.

ROLE	DESCRIPTION
Sub-Group Admin	This role manages the Sub-Group Account(s) if you choose to use them. This role can perform all services available in the portal and see all applicable data at the Sub-Group Account level. It can also grant and remove access for users within a specific Sub-Group Account. If a Sub-Group Admin has not been assigned, the role defaults to the assigned Contract Admin. This role can assign all roles except additional Sub-Group Admins and the Contract Admin role.
Admin Lite	The Admin Lite role is typically assigned to help the Contract or Sub-Group Admin with access requests as well as managing and assigning user roles. This role can do everything a Contract or Sub-Group Admin can do, except assign the Sub-Group and Contract Admin roles, and update demographic info. This role can be assigned to more than one user.

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To start using the new features offered within your new portal, visit **https://provider.wellcare.com/**.

If you have not been assigned as a Contract Admin yet, you need to start by registering for a username and password. You have two options:

1. **If you already have a username and password on our old portal,** log into the new portal with your existing username and password, complete the registration process and then contact your Provider Relations Representative or Network Management Specialist. They will be able to assign you the role of the Contract Admin.

2. **If you are new to our portals and need a username and password,** choose the options to "register now" on the new portal login page and complete the registration process, and then contact your Provider Relations Representative or Network Management Specialist. They will be able to assign you the role of the Contract Admin.

How to Approve an Affiliation Request

As an admin, you will be managing users who want to be associated/affiliated at either the Contract or Sub-Group level (if a Sub-Group Admin has not been assigned). To grant permissions to a user who has requested affiliation to your Contract or Sub-Group Account(s), please follow these steps:

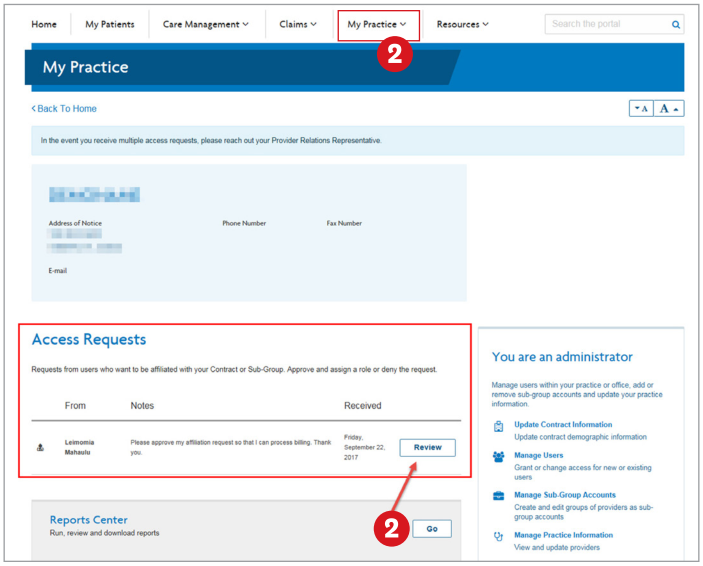
1. Log in to the provider portal: **https://provider.wellcare.com**

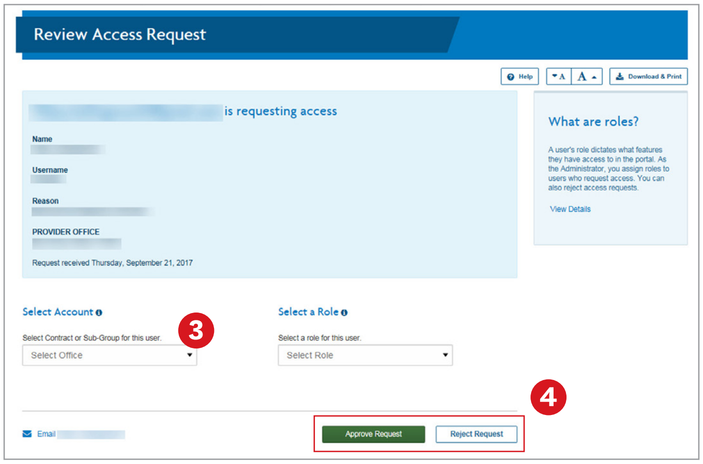
2. Navigate to the My Practice area to review access requests from users.

   a. Once you find the user, select 'Review.'

3. You will need to select the appropriate level of association/affiliation – Contract or Sub-Group – and the role you want to assign to the user.

4. Select "Approve Request" or "Reject Request." An email will be sent to the user indicating whether their request has been granted or denied.





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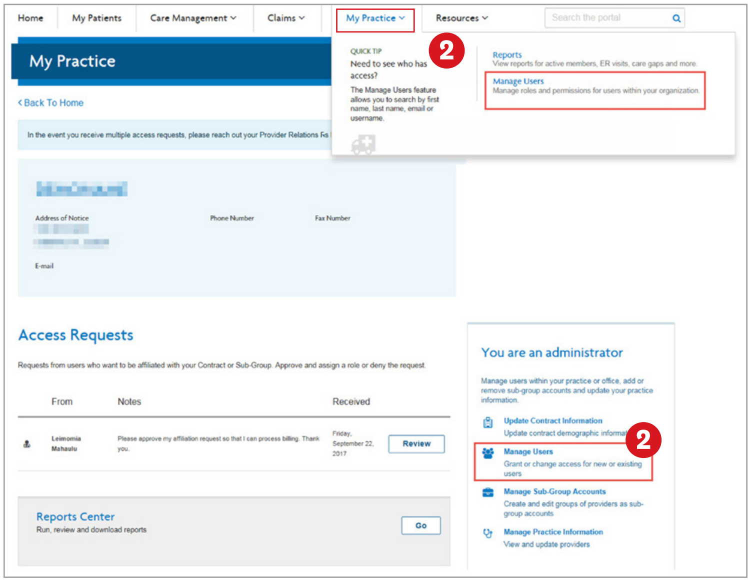
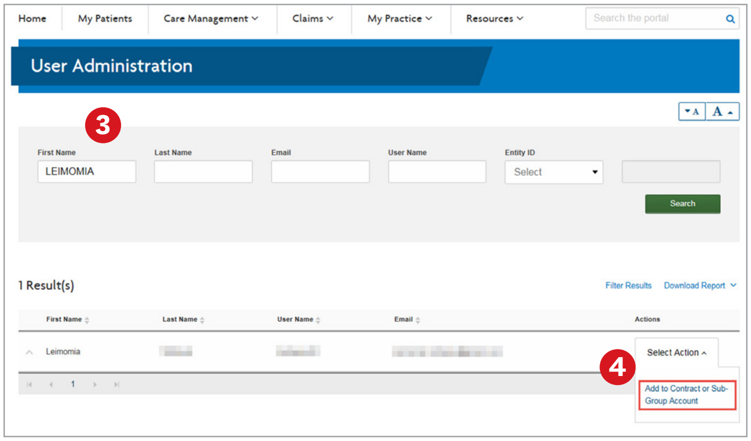
Searching for Users to Affiliate

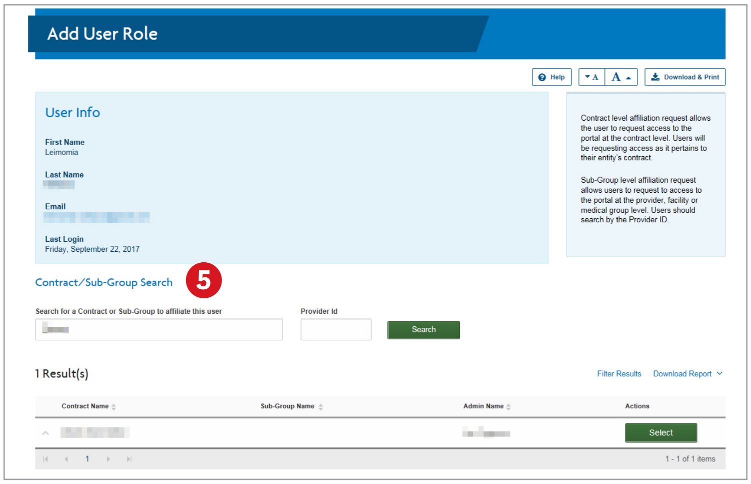
If you have a user(s) who has registered their username and password but has not yet requested affiliation to your Contract or Sub-Group Account(s), you can affiliate them.

To grant them permissions, follow these steps:

1. Log in to the provider portal: **https://provider.wellcare.com**
2. To search for a user, navigate to My Practice > “Manage Users”
3. Search by one of the following:
   a. First Name
   b. Last Name
   c. Email Address
   d. Username
   e. Entity ID (Provider ID, Tax ID or National Provider ID)
4. Under Actions, select “Add to Contract/ Sub-Group Account”
5. Search the Contract/Sub-Group name or Provider ID







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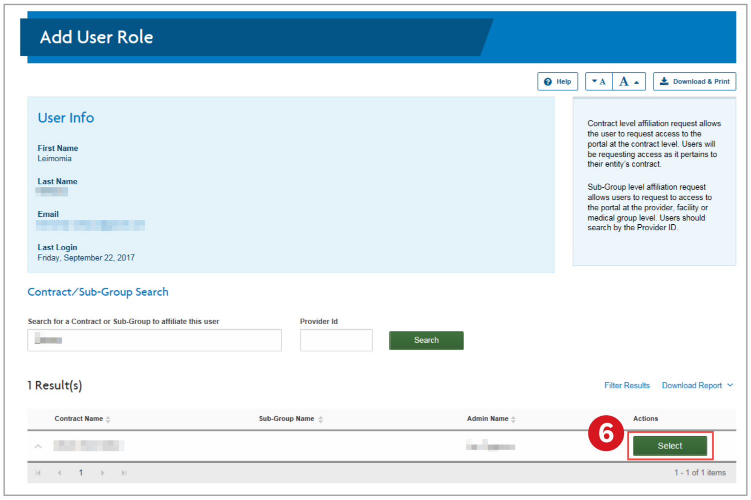
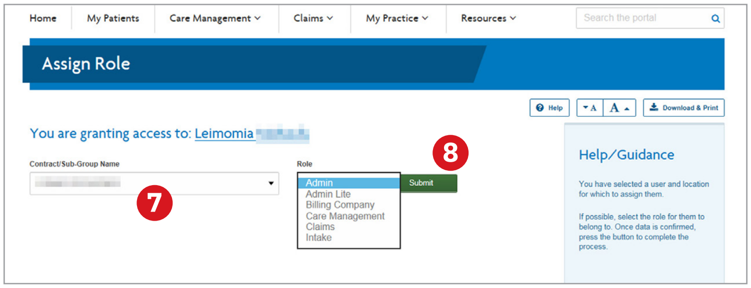
Searching for Users to Affiliate *continued*

6 Once the results display, click the “Select” button on the correct Contract/Sub-Group option

7 Confirm the Contract/Sub-Group selection is correct and assign a role to the user

8 Select “Submit”





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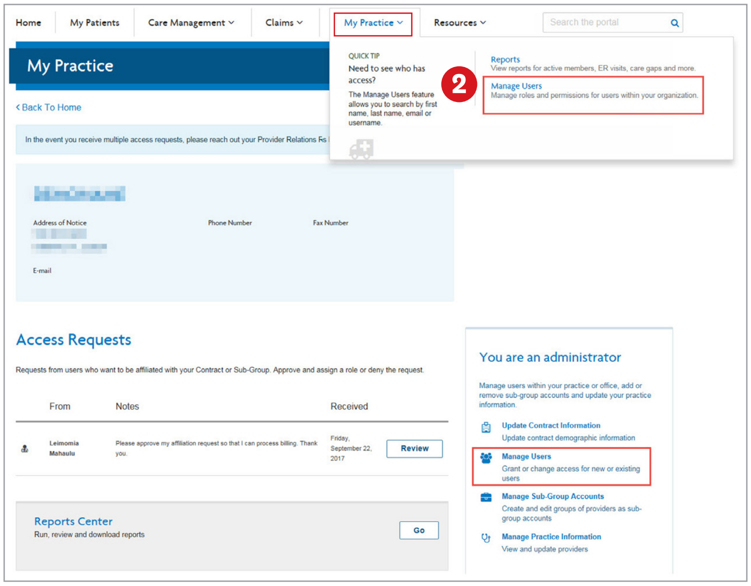
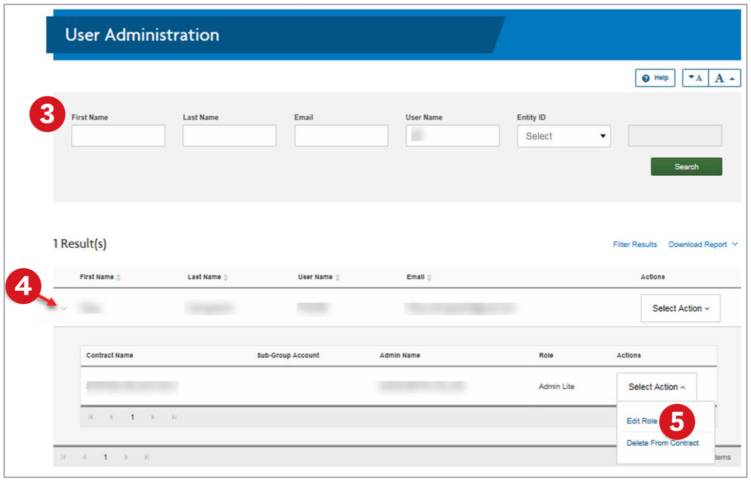
Updating Roles & Access

If you need to update a user's role or remove a user's access follow these steps:

1. Log in to the provider portal: **https://provider.wellcare.com**
2. To search for a user, navigate to My Practice > "Manage Users"
3. Search by one of the following:
   a. First Name
   b. Last Name
   c. Email Address
   d. Username
   e. Entity ID (Provider ID, Tax ID or National Provider ID)
4. Once the desired user is found, select the caret to the left of the user's first name to reveal all affiliations.
5. Navigate to the select action drop down and select "edit role".

Note: You can also delete a user from a specific contract or sub-group by selecting "Delete from Contract/Sub-Group".





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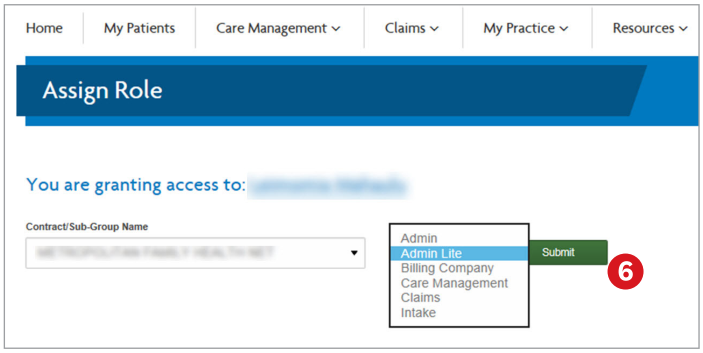
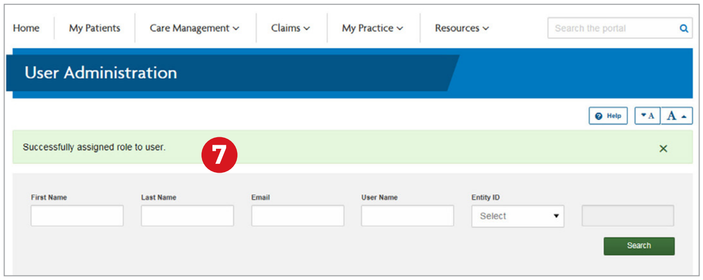
Updating Roles & Access *continued*

6 After selecting "edit role" at the Contract/Sub-Group Account level you will be prompted to assign a new role to the user as seen in the image below:



7 Upon submitting a request to assign a new role, the user will receive a confirmation message affirming the change.



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Provider Portal Roles and Descriptions

NO ASSOCIATION	BILLING COMPANY	CLAIMS	INTAKE
This is the default role. After a user registers for the portal (gets a username and password) and signs into the portal, this is their role until they are affiliated with a Contract or Sub-Group Account. **Will be able to:** request affiliation at the Contract or Sub-Group Account level, and access the Help feature. **Will not be able to:** access any portal features until assigned one of the other roles in this guide.	This role is designed for billing company employees. **Will be able to:** view member eligibility, as well as authorization and claim status. **Will not be able to:** submit anything, such as claims, authorizations, etc. or view information such as care gaps, reports and visit checklists.	This role is designed for a user who focuses on managing claims. **Will be able to:** access all claims functions – searching claim status, submitting claims and submitting appeals or disputes, as well as complete training as necessary. **Will not be able to:** submit authorizations, care gaps, referrals, etc. or view care gaps.	This role is designed for staff that initially process patients, obtain insurance information and check member eligibility. **Will be able to:** view member eligibility, members' profiles and benefits, authorization and claims status, care gaps, reports and care plans, as well as complete training as necessary. **Will not be able to:** submit care gaps, claims, authorizations.
CARE MANAGEMENT	**ADMIN LITE**	**SUB-GROUP ADMIN**	**CONTRACT ADMIN**
Designed for a staff member who works across multiple functions in the site such as claims, authorizations and referrals. **Will be able to:** perform a combination of the Claims role and Intake role with a few additional features, including the ability to submit authorizations and request member transfers. **Will not be able to:** change practice demographic information or manage users in the account.	This role is typically assigned to assist the Contract or Sub-Group Admin with access requests and managing/assigning user roles. This role can be assigned to more than one user. **Will be able to:** perform all activities that a Care Management role can, as well as approve/reject users to the portal account and assign/change user roles. **Will not be able to:** assign the Sub-Group and Contract Admin roles or update demographic information within Practice Management.	This role manages a Sub-Group Account. If a Sub-Group Admin has not been assigned when a Sub-Group Account is created, then the role defaults to the Contract Admin role. **Will be able to:** perform all activities within the Sub-Group Account within the limits of their assigned Sub-Group. **Will not be able to:** view or submit anything within the Contract Account or other Sub-Group Account(s).	This role has full administrative access of the Contract Account. Each contract can only have one Contract Admin. **Will be able to:** perform all activities in the portal within the Contract Account. **Will not be able to:** n/a.

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Contract Administrator Quick Tips/FAQ

How does the Contract Administrator (Admin) get set up?	After completing registration on the portal, Contract Admins are given permissions with the help of their Provider Relations Representative, Network Management Specialist or Customer Service Representative.
What is my role as Contract Admin in the new Provider Portal?	As a Contract Admin, you will be responsible for: • Approving/rejecting users and assigning a role to them. • If your organization is complex and/or you need to limit access to certain medical groups or facilities, you will want to create Sub-Group Account(s) and assign Sub-Group Admins. (If you don't assign a Sub-Group Admin, you will be the admin for the group as well.) • You're a super-user for your contract, meaning you can perform all services available in the portal and see all applicable data at the contract level (including all Sub-Group Account(s)' services and data).
What does Affiliation mean?	The act of a user asking for a role within a Contract or a Sub-Group Account.
What is a Sub-Group?	Some contracts have multiple medical groups and/or facilities that are part of the same contract. If you want to provide access at these levels, the new provider portal allows Contract Admins to create custom Sub-Group Account(s) to assemble these together. The Sub-Group(s) can then be managed by a Sub-Group Admin, and data and services can be limited to this level.
What is a Sub-Group Admin?	A Sub-Group Admin manages users and overall details for the Sub-Group Account(s) to which they are assigned. If the Contract Admin does not assign a Sub-Group Admin, he/she will inherit this role.
Does every contract need a Sub-Group?	No. If your organization is set up in such a way that all users can work under the Contract level Account, no Sub-Group Account(s) are needed.
What happens if I delete a Sub-Group?	If a Sub-Group is deleted, users associated with that Sub-Group will not lose their username and password, but they no longer will be affiliated with your provider entity in the portal (unless they have roles in other Sub-Group Accounts under that Contract). If you want them affiliated in a different way, the Contract Admin will need to create a new Sub-Group and affiliate the user(s) again.

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Contract Administrator Quick Tips/FAQ *continued*

How do other (non-Admin) users get permissions?	Users can get their roles in two ways; they always need to register (get a username and password) first, and then: • A user can be assigned his or her affiliation/role by the Contract Admin, Sub-Group Admin or Admin Lite. • A user can request an affiliation to a Contract or Sub-Group and that request is routed to the Admin to approve and assign a role or reject the request. (The user will need to wait for Admin approval and assignment before accessing the provider information/services in the portal.)
Can I make another person a Contract Admin?	Each contract can only have one Contract Admin at a time. If a Contract Admin needs to be replaced, please contact your Provider Relations Representative, Network Management Specialist or Customer Service.
What happens when an Admin goes on vacation or leave?	**For Contract Admins:** Be sure to assign an Admin Lite role before you depart. The Admin Lite role will be able to do everything a Contract Admin can except assign a Contract Admin and/or Sub-Group Admins and update contract demographic info. **For Sub-Group Admins:** Be sure either to assign an Admin Lite or another Sub-Group Admin for your Sub-Group. Both of these roles can do everything you do, but the Admin Lite role cannot assign another Sub-Group Admin or update demographic info.
Can I change a user's permissions?	Yes. Once you find the appropriate user in the "Manage Users" section of Practice Management, you can adjust their permissions to the new role you wish to assign.
What is an Admin Lite?	The Admin Lite role can do everything an Admin role can do except assign a Contract or Sub-Group Admin or update demographic info.
If I need help who can I reach out to?	If you need assistance using the portal, you can access the "? Help" on every page. If further assistance is needed, please contact your Provider Relations Representative, Network Management Specialist or Customer Service.

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Terms & Definitions	
Admin Lite	Helps the Contract or Sub-Group Admin with access requests and managing/assigning user roles.
Affiliation	The act of a user requesting a role at a Contract or Sub-Group Account level to conduct business on their behalf.
Contract Account	Account based on a contract with Wellcare. Users at this level can view and transact as any and all IPAs, medical groups, facilities and/or providers associated to the contract.
Contract Admin (Administrator)	Manages the Contract Account – grants and removes access for all users and can create/dissolve Sub-Group Accounts.
Provider	Those who work with us to deliver or furnish health care services, including doctors, health care professionals, hospitals, pharmacies and labs.
Sub-Group Account	Offers flexibility for contracts with multiple facilities and/or medical groups. Contract Admins can create these customized user-group accounts and designate specific groups and/or facilities they are permitted to view.
Sub-Group Admin (Administrator)	Manages the Sub-Group Account – grants and removes access for users within the specific Sub-Group Account. If a Sub-Group Admin has not been assigned the role, it defaults to the Contract Admin.
Registration	The act of getting (and/or verifying) a username and password – must complete some demographic information about the user and choose three security questions.
Roles	A level of access assigned to the user based on the functions the Admin wants them to be able to perform.