# Quick Tips for Provider Representatives

# New Provider Portal

## Definitions

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| **Admin Lite** | Assists the Contract or Sub-Group Admin with access requests and managing and assigning user roles. |
| **Affiliation** | The act of a user requesting a role at a Contract or a Sub-Group Account level to conduct business on their behalf. |
| **Contract Account** | Account based on a contract with WellCare – users, at this level, have the ability to view and transact as any and all IPAs, Medical groups, Facilities and/or providers associated to the contract. |
| **Contract Admin (Administrator)** | Manages the Contact Account – grants and removes access for all users and can create/dissolve Sub-Group Accounts. |
| **Sub-Group Account** | These are optional - if contract has multiple facilities and/or medical groups and the Contract Admin wants to limit certain user groups to only see certain locations, facilities, providers he/she can group those into a Sub-Group Account. |
| **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 defaults to the Contract Admin. |
| **Registration** | The act of getting (and/or verifying) a user name and password – must complete some demographic information about the user and choose three security questions. |
| **Roles** | Users can be assigned different levels of access depending on what functions the Admin wants them to be able to do. |

## FAQs

### My Role

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| **What role will I have on the new portal as a provider representative?** | You will be able to impersonate users on the new site. This means you will log in with your own credentials (Username: ad\WELLCARE USERNAME; Password: WELLCARE password). Upon login, you will be routed to the User Administration Dashboard. This will be the starting point for initiating any function. Options to impersonate users, identify/assign Contract Admins, manage/create Sub-Groups, edit/assign roles or reset passwords can be done here. |
| **What can't I do on the new portal as a provider representative?** | You cannot complete any transactions (submit a claim, authorization, etc.) |

### Administrators

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| **Why do we need administrators?** | • If a contract doesn't have an assigned Contract Admin no other users can be assigned to the account (or access any of the information or tools.) All contracts that want to be active on the portal must have a Contract Admin.<br>• Sub-Group Admins are optional, but they can take some of the burden off a Contract Admin if there are Sub-Groups to manage.<br>• Admin Lites are great backups for all types of Admins – they can help manage users when either the Contract and/or Sub-Group Admins are out of the office or too busy to handle all of the access requests. |
| **Tell me more about Contract Admins.** | • This role has full administrator rights at the contract level.<br>• 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).<br>• It can also grant and remove access for all users at the contract level, and can create or dissolve Sub-Group Accounts.<br>• Each contract can have only one Contract Admin.<br>• All contracts that want to be active on the portal must have a Contract Admin. |
| **Tell me more about Sub-Group Admins.** | • This role manages the Sub-Group account(s), if Contract Admins choose to create them.<br>• This role can perform all services available in the portal and see all applicable data at the Sub-Group Account level, and grant and remove access for users within the specific Sub-Group Account.<br>• If a Sub-Group Admin has not been assigned, then the role defaults to the assigned Contract Admin.<br>• This role can assign all roles except additional Sub-Group Admins and the Contract Admin role. |
| **Who chooses the administrators?** | • Contract Admins are chosen by the person at the contract who has the authority to make this decision – perhaps the head provider, office administrator, etc. It will vary contract to contract.<br>• Sub-Group Admins are chosen by the Contract Admin. |
| **How does the Contract Admin get set-up?** | • Contract Admins need to be assigned by a Provider Relations Representative, Network Management Specialist or Customer Service Representative.<br>• They can be assigned after they have registered. |

## Registration and Affiliation

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| **What are the steps a user in a provider office will follow to register (get a user name and password)?** | Existing [WellCare, Ohana Health Plan, Missouri Care] Portal User<br>• **Prior to go live:** Go to https://provider.wellcare.com/ and login with their existing username and password.<br>• **After go live:** Go to https://www.wellcare.com/, select the appropriate state and then complete the "Login/Register" dropdown. Once at the portal login page, they will enter their existing username and password.<br>• After logging in, they will reach a registration/sign-up screen that will have most of their information pre-populated. On this screen, they will need to:<br>a) Review information for accuracy and/or make updates<br>b) Enter a phone number<br>c) Select and answer 3 security questions<br>d) Click to agree to the Terms and Conditions<br>e) Click the Submit button<br>• **Next step:** See next question "What is affiliation and/or how does a user get access to the tools and data after they have registered?"<br><br>New User<br>• **Prior to go live:** Go to https://provider.wellcare.com/ and login with their existing username and password.<br>• **After go live:** Go to https://www.wellcare.com/, select the appropriate state and under the "Login/Register" dropdown, select "Register for an Account".<br>• Complete the registration/sign-up screen<br>• **Next step:** See next question "What is affiliation and/or how does a user get access to the tools and data after they have registered?" |
| **What is affiliation and/or how does a user get access to the tools and data after they have registered?** | Admins<br>After completing registration on the portal, Contract Admins are given permission with the help of their Provider Relations Representative, Network Management Specialist or Customer Service Representative.<br><br>Other User Types<br>Users can acquire their roles in two ways, they always need to register (get a user name and password) first and then:<br>• A user can be assigned his or her affiliation/role by the Contract Admin, Sub-Group Admin or Admin Lite.<br>• A user can send an affiliation request to a Contract or Sub-Group and that request is then routed to the Admin to approve/reject and assign a role. (The user will need to wait for Admin approval and assignment before accessing the provider information/services in the portal.) |

## Other

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| **How do other users get their permissions?** | Users, including Sub-Group Admins, can either:<br>• Be given their affiliation and role directly by the Contract Admin.<br>• Request an affiliation to a specific Contract or Sub-Group and that request will be routed to the Contract/Sub-Group Admin to approve and provide the appropriate role for the user. |
| **Do providers have to set-up Sub-Groups?** | No, if the office works in such a way that one account would work, no Sub-Group Accounts need to be created. |
| **Some of the demographic information for my provider is incorrect, how do I correct it?** | Follow the PLF process – the data you see on the portal is the data that is in Xcelys. **(The only area to which this is not relevant is the information within a user's profile, completed during registration/sign-up, that information was manually entered by the user and is only used to communicate password updates.)** |
| **If I need help what should I do?** | Until November 15, 2017, the Digital Communications team can help you at Provider_Web@wellcare.com<br><br>After this time, follow the normal procedures for website support:<br>• If you have an issue with login and/or access as well as technical questions on the Provider Portal/Secure Website, Providers and/or internal associates on behalf of a provider can call the Web Support Team at 866-592-5832 during the hours of operation: Monday-Friday 8am-6pm EST.<br>• If the you have an issue with the website (something is broken, you need content changes/updated, your market needs a message posted, etc..) please submit a Digital Communications requests at: Channel Communication Services Request Wizard Form http://ccmpap01:8084/apps/acm-dashboard/classic/index.html?flags=fullview&application=%7bee032fd4-6c0f-cfb0-1786-8342c40de8dc%7d&context=WizardForm&action=fillTheForm&templateId=%7b774916c1-1727-c4df-1e6f-3aafa84fae81%7d |

## Assigning a Contract Admin

**For Initial Go-Live (this depends on market, ranging from September 28 – October 26)** – If you want Digital Communications to create them for you, identify the Contract Admin, fill in their user name* next to the contract to which they should be assigned and let us know if they need Sub-Groups (see next section, if yes.) *** Remember they have to register first – they cannot be assigned until they are registered**.

Going Forward (and or if you want to set up a few of your own)

| How to assign a new Contract Administrator: |
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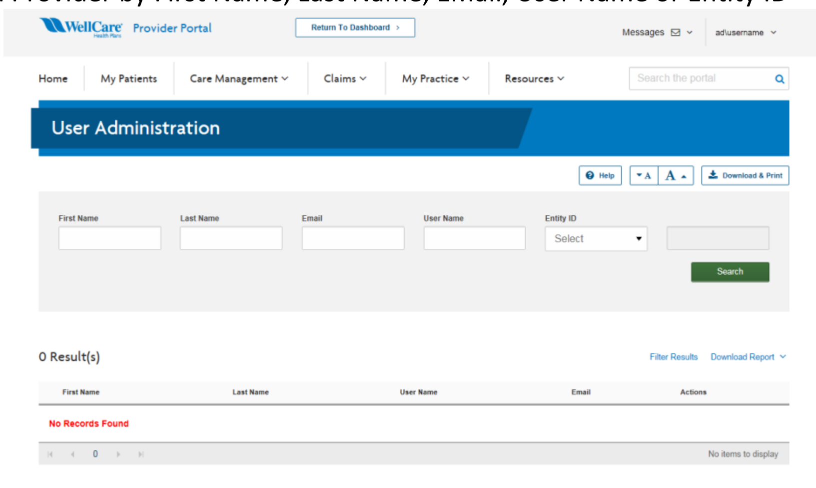
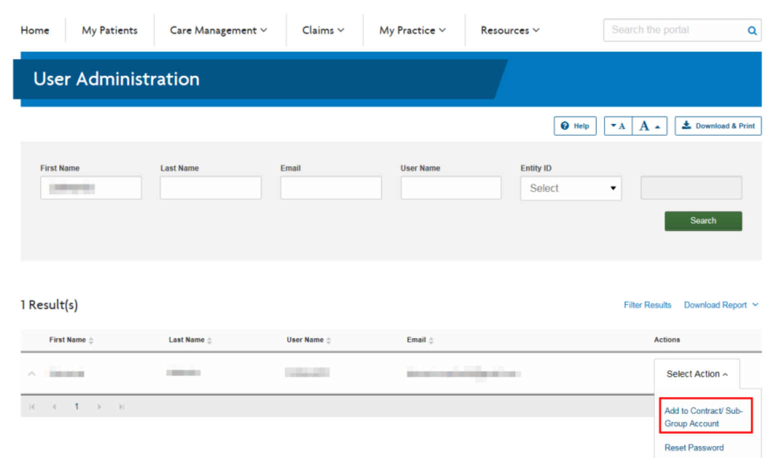
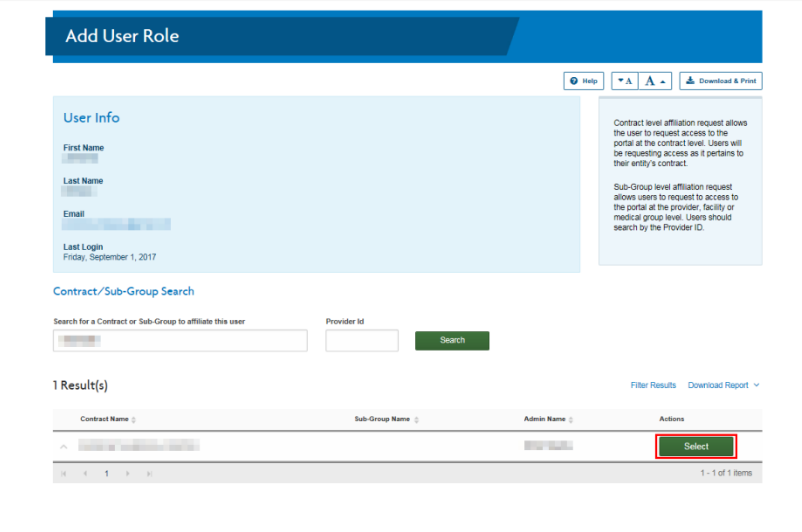
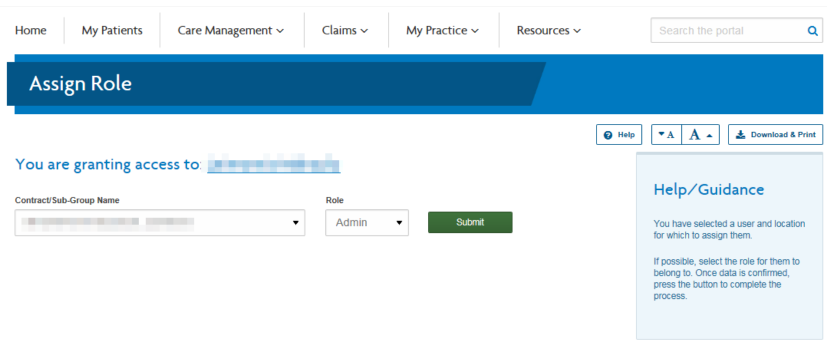
| **1.** Establish who the Contract Administrator (Contract Admin) is going to be. This is a person who your main contact at your provider entity should designate. You will need to explain that this person will have the authorization to approve or reject all users to the Contract Account, assign users roles and create Sub-Group Accounts, if necessary. |
| **2.** After the designated Contract Admin has successfully registered on the portal, you will be able to formally assign them as the Contract Admin within the portal.<br>a. Sign in with your WellCare account credentials into the portal<br>i. Username: ad\WELLCARE USERNAME<br>ii. Password: your WELLCARE password that you use for you computer<br>b. Search Provider by First Name, Last Name, Email, User Name or Entity ID<br><br>c. In results page, select the "Select Actions" drop down and select "Add to Contract/Sub-Group Account"<br> |

d. Search the contract name within the Office Name field

e. Select the Contract Name to add the Contract Admin role




f. Confirm the Contact/Sub-Group name and select the Admin Role and select Submit



## How to Create a Sub-Group

**For Initial Go-Live (this depends on market, ranging from September 28 – October 26)** – If a Contract Admin wants/needs a Sub-Group(s), the Digital Communications can create them for you. Complete the provided spreadsheet with how many Sub-Groups they want, what medical groups/facilities should be in the each Sub-Group, the names of the Sub-Groups and Sub-Group Admin(s) (if known.)

**Going Forward** – Instructions will be sent soon.

**Helpful information about Sub-Groups:**

Establish if the Contract Admin wants Sub-Groups, pros and cons:

**Pros**

- Ability to separate groups of providers at certain facility and/or locations into defined groups - limiting access to users so they only see defined information.

**Cons**

- If users work across many of your Sub-Groups then they will have to work in the different accounts in order to see information – not as easy as seeing all information in one account.
- Sub-Group Accounts do need oversight and problem solving, so the more they have, the more time they may need to devote to this management.
- Depending on how complex the Sub-Groups are and savvy the users are some could get confused.

## Other Information

More how to guides and training is coming.  If you have questions between now and November 15, 2017, please don't hesitate to reach out to the Digital Communications team at Provider_Web@wellcare.com.