IDAHO DEPARTMENT OF HEALTH & WELFARE

Trading Partner Account (TPA) Registration and Maintenance User Guide

for

State of Idaho MMIS

gainwell

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1. TRADING PARTNER ACCOUNT (TPA)

This user guide is to assist providers with registering for and maintaining their Trading Partner Accounts (TPA) on the Idaho Gainwell Technologies Medicaid website at www.idmedicaid.com.

2. REGISTERING A NEW TPA

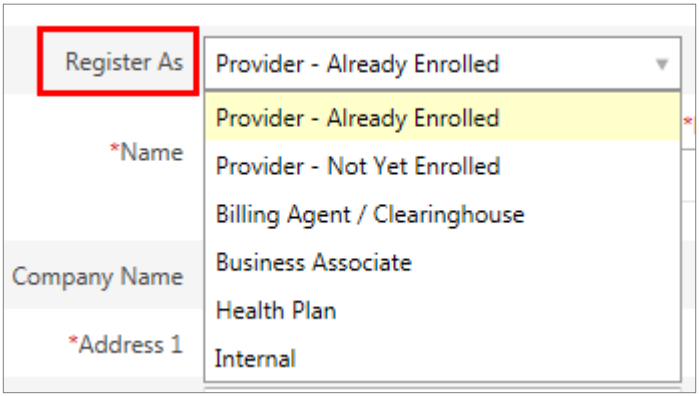
Only one TPA should be registered per Tax ID. Multiple National Provider Identifier (NPIs) or Atypical IDs can be affiliated to the account. Multiple users can be given access after registration has been approved and activated. Registration credentials are validated in real-time and are automatically approved or denied.

2.1. TPA Types

Each TPA type has access to different parts of the website. There are six TPA types to choose from during registration (Figure 2-1).

- **Provider – Already Enrolled**: Providers who have met all screening and credentialing requirements and have an approved enrollment application.
- **Provider – Not Yet Enrolled**: Providers who are not yet enrolled with Idaho Medicaid must register using this option in order to access the Idaho Provider Enrollment Application. Once the provider's enrollment application has been submitted and approved, the provider may enter additional information in their TPA.
- **Billing Agent/Clearinghouse**:
  - **Billing agencies** are contracted by providers to create and manage the submission of the claims and related transactions for the providers. (When a billing agency first registers the TPA type will default to *Clearinghouse*. Once the billing agent is associated to a provider's TPA, the TPA type will change to *Billing Agent*.)
  - **Clearinghouses** aggregate Electronic Data Interchange (EDI) transactions from multiple providers.
- **Health Plan**: Gainwell Technologies will exchange Electronic Protected Health Information (EPHI) using EDI/X12 transactions with this TPA type.
- **Business Associate**: Non-medical providers, such as transportation services, that only need to exchange Electronic Protected Health Information (EPHI) using EDI/X12 transactions.
- **Internal**: Internal TPA types are not available for use by providers.

Figure 2-1: TPA Types



2.1.1. Provider – Not Yet Enrolled

Providers who are not yet enrolled with Idaho Medicaid must register using this option. For detailed instructions on registering as a Provider – Not Yet Enrolled, refer to the *Trading Partner Account Provider Not Yet Enrolled Registration Guide* on www.idmedicaid.com.

2.2. Access by TPA Type

Each type of TPA account will have different access within the Idaho Gainwell Technologies Medicaid website (Figure 2-2).

Figure 2-2: TPA Access by Type

Secure Menu Item	Provider Already Enrolled	Provider Not Yet Enrolled	Billing Agent	Clearing-house	Health Plan	Business Associate
Manage Users	X	X	X	X	X	X
Reset Password	X	X	X	X	X	X
User Status	X	X	X	X	X	X
Manage Providers	X	X	X	X		
Manage Billing Agents	X					
Account Information	X		X	X	X	X
EDI Certification Status	X		X	X	X	X
Provider Enrollment	X	X				
X12 Upload	X		X	X	X	X
X12 Archive Search	X		X	X	X	X
Document Exchange	X		X		X	
X12 Responses	X		X	X	X	X
Claim (837)	X		X	X	X	X
Claim Status (276)	X		X	X	X	X
Eligibility (270)	X		X	X	X	X
Finance (835, 820)	X		X	X	X	X
Services Review (278)	X		X	X	X	X
Reports	X		X	X	X	X
Remittance Advice (pdf)	X				X	X
Claims in Process	X		X	X	X	X
Healthy Connections Roster	X		X	X	X	X
View Authorizations	X		X			
View & Submit Claims	X		X			
Verify Member Eligibility	X		X		X	
View Patient Roster	X		X			
View & Submit LTC Case	X		X			
View PCP Roster	X		X			
View Payment Detail	X		X			
View & Submit Referrals Submission	X		X			

2.3. TPA Account Administrator

The person registering for the TPA will be made the administrator of the account and will manage security for additional TPA users. Each user may have access to different parts of the TPA (such as claims or member eligibility) or may be given rights to all areas

(administrator). A TPA may have multiple administrators and users. Refer to section *5.1 Manage Users*.

2.4. Detailed Registration Steps

Register by selecting the **Register** link in the upper right-hand corner of the www.idmedicaid.com homepage (Figure 2-3).

Figure 2-3: Register Link

2.4.1. Step 1 – Demographic Information

The available and mandatory fields will change based on the user type selected in the **Register As** field. A red asterisk (*) indicates required information.

1) After **Register As**, select the appropriate user type from the drop-down list.
2) Enter **First Name**, **Middle Initial** (**M.I.**), **Last Name**, and select a **Title**.
3) Enter the **Company Name**, if required.
4) Enter the **ZIP** code in the five-digit format, with or without the four-digit zip code extension (XXXXX or XXXXX-XXXX) using numeric values only. The City, State and Country associated to the ZIP code will auto-populate into the respective fields.
5) Enter **Address 1** with street address and/or **Address 2** with P.O. Box or additional address information.
6) The **City** will be auto-populated based on the ZIP code.
7) The **State** will be auto-populated based on the ZIP code.
8) The **Country** will be auto-populated based on the ZIP code.
9) Enter **Telephone** number in a 10-digit format (numeric values only).
10) Enter **Website Address** (optional).
11) Enter your nine-digit **Tax ID** or **FEIN/SSN** as prompted.
    a. Provider – Already Enrolled: Enter your **FEIN/SSN**
    b. Provider – Not Yet Enrolled, Billing Agent/Clearinghouse, Business Associate, Health Plan: Enter your **Tax ID**
12) Enter either **NPI** (Typical Medicaid Healthcare Provider) or **Atypical ID**. If these fields are shown on the screen, one of these is required.
13) Enter Enrollment Case Number as **PIN**, if required.
14) At the bottom of the screen, select **NEXT** to move to the next screen or select **CANCEL** to exit your TPA registration without saving and return to the homepage.
15) The address entered on the **Demographic Information** screen is required to be validated against the USPS database. The **Verify Address** screen will populate and display the **Validated** address. It is recommended that you select the USPS validated address. Select the **Use this Address** link and then select **ACCEPT ADDRESS SELECTION** to proceed.

Figure 2-4: Demographic Information Page

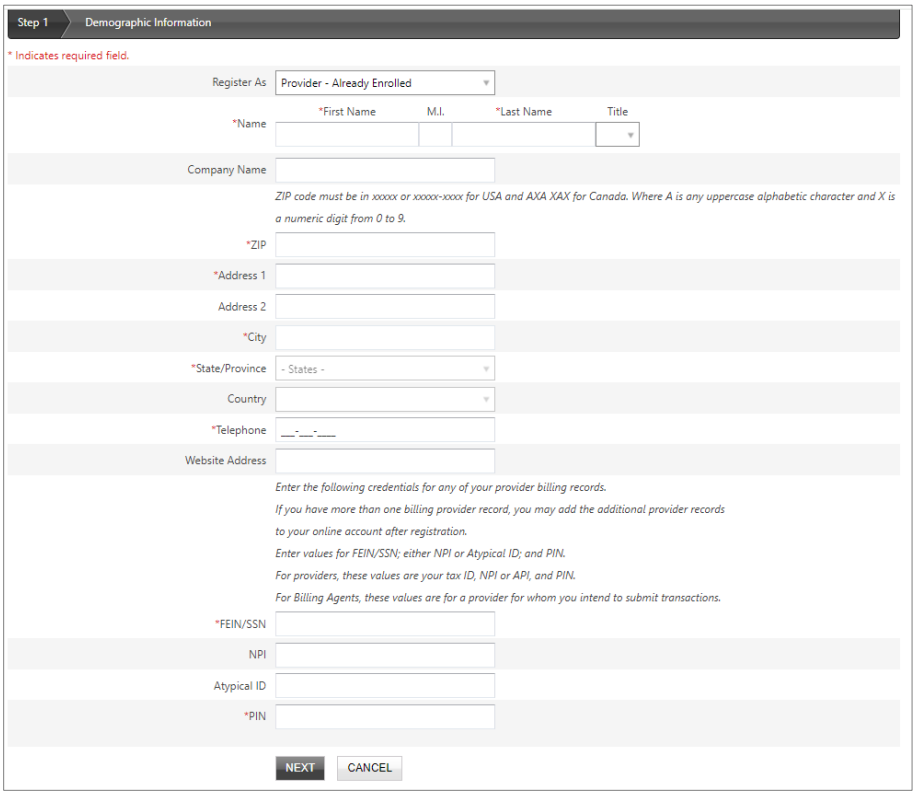
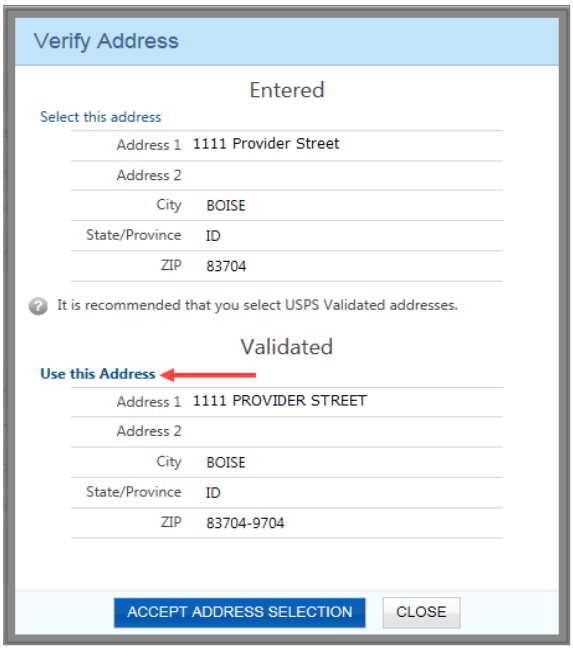


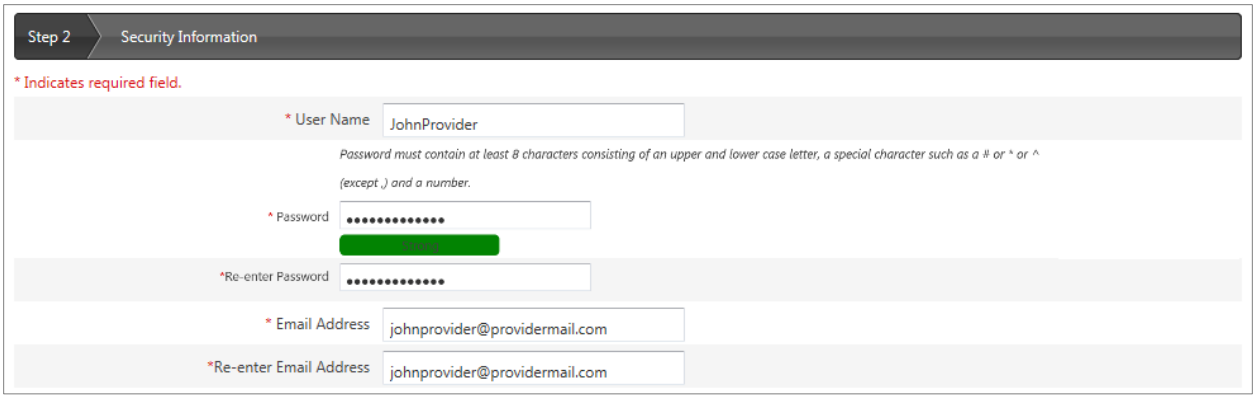
Figure 2-5: Verify Address



2.4.2. Step 2 – Security Information

1) Enter your desired **User Name**. This is the user name that will be used to sign into your TPA account.
2) Enter a **Password**. Passwords must be at least eight characters long, cannot contain spaces, and must contain at least one each of:
    a. Upper case letter
    b. Lower case letter
    c. Special character (such as an asterisk *)
    d. Number
3) Re-enter the same password entered above. Please retain your password as it will be needed for accessing your TPA.
4) Enter **Email Address**.
5) Re-enter the same Email Address entered above.

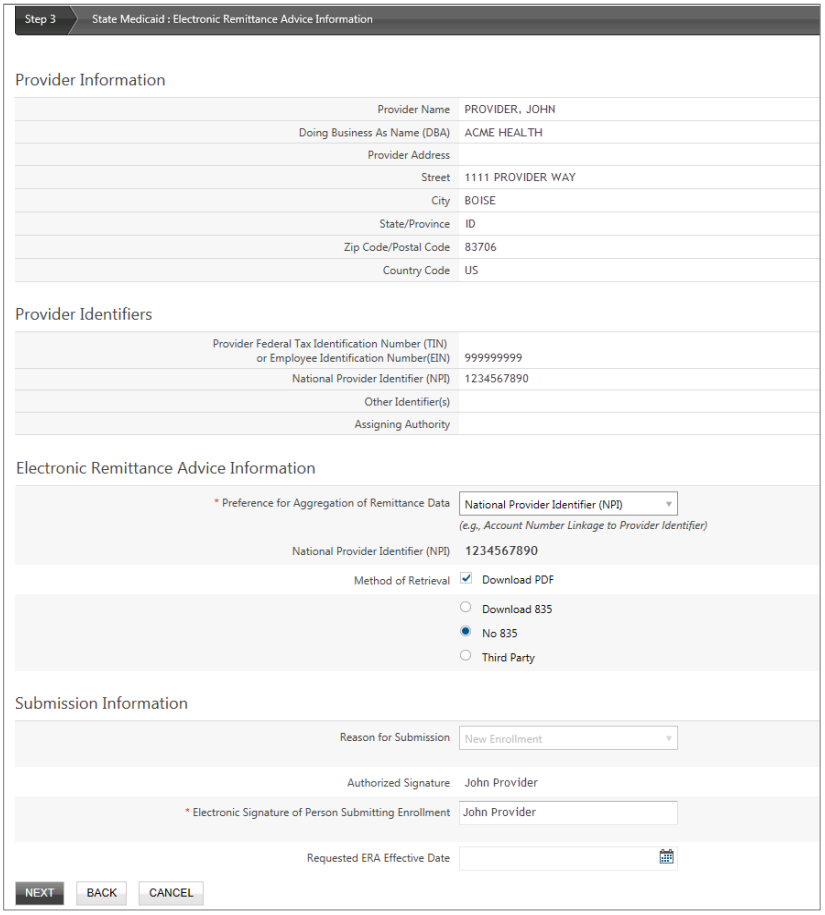
Figure 2-6: Security Information Page



2.4.3. Step 3 – Remittance Advice Selection

1) Review **Provider Information** and **Provider Identifiers** for accuracy.
2) Under **Electronic Remittance Advice Information (ERA)**, choose either the Provider Tax Identification Number (TIN) or the National Provider Identifier (NPI) from the drop-down.
3) The **Download PDF** checkbox is checked by default; when checked, you will receive your remittance advice (RA) electronically. If you wish to receive a paper RA in the mail, uncheck this box.
4) Choose the appropriate radio button to determine your 835 file preferences.
    a. **Download 835**: Select this option if you wish to receive an electronic version of the 835.
    b. **No 835**: Select this option if you wish to opt out of receiving an 835.
    c. **Third Party**: Select this option to display a drop-down of your associated billing agents/clearinghouses; then select the billing agency or clearinghouse who will receive the 835 for processing.
5) The **Reason for Submission** should be New Enrollment.
6) Fill in the **Electronic Signature of Person Submitting Enrollment** field.
7) Choose your **Requested ERA Effective Date** by selecting the calendar icon.
8) At the bottom of the screen select **NEXT** to move to the next screen or select **BACK** to return to the previous step to make corrections. Select **CANCEL** to exit your TPA registration without saving and return to the homepage.

Figure 2-7: Electronic Remittance Advice Information Page

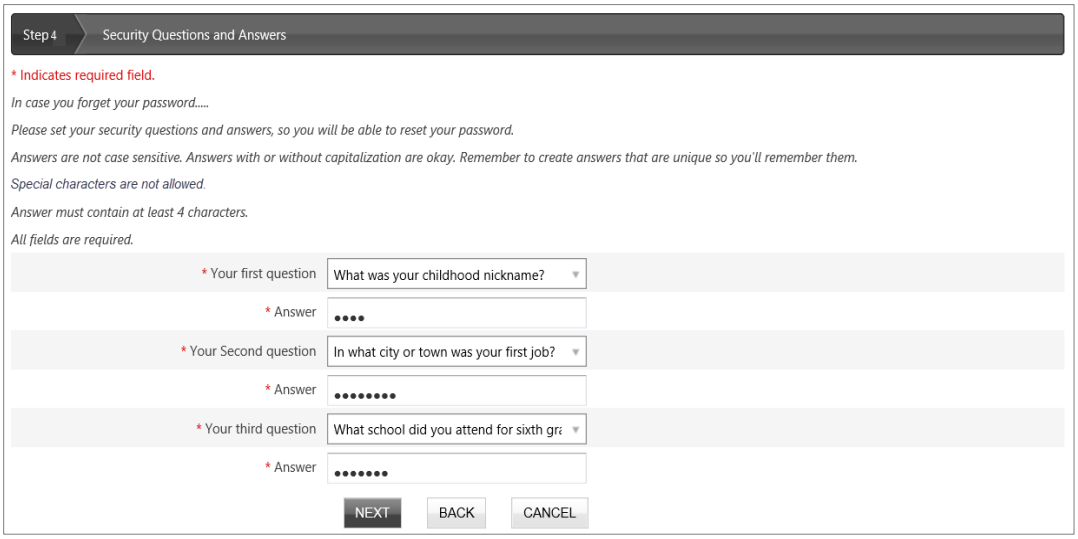


2.4.4. Step 4 – Security Questions and Answers

Three security question prompts will display, and all questions are required to be chosen and answered. Answers are not case sensitive. Special characters are not allowed. Answers must contain at least four characters.

1) Select your first security question from the **Select one…** drop-down.
2) Enter your answer or response in the **Answer** field.
3) Select your second security question from the **Select one…** drop-down.
4) Enter your answer or response in the **Answer** field.
5) Select your third security question from the **Select one…** drop-down.
6) Enter your answer or response in the **Answer** field.

Figure 2-8: Security Questions and Answers Page



2.4.5. Step 5 – Confirm Information

1) View the confirmation page and make any necessary corrections.
2) Select **CONFIRM** located at the bottom of page to move to the next screen or select **BACK** to return to the previous step to make corrections. Selecting the **CANCEL** button will cancel the registration and return to the homepage.

Figure 2-9: Confirmation Page

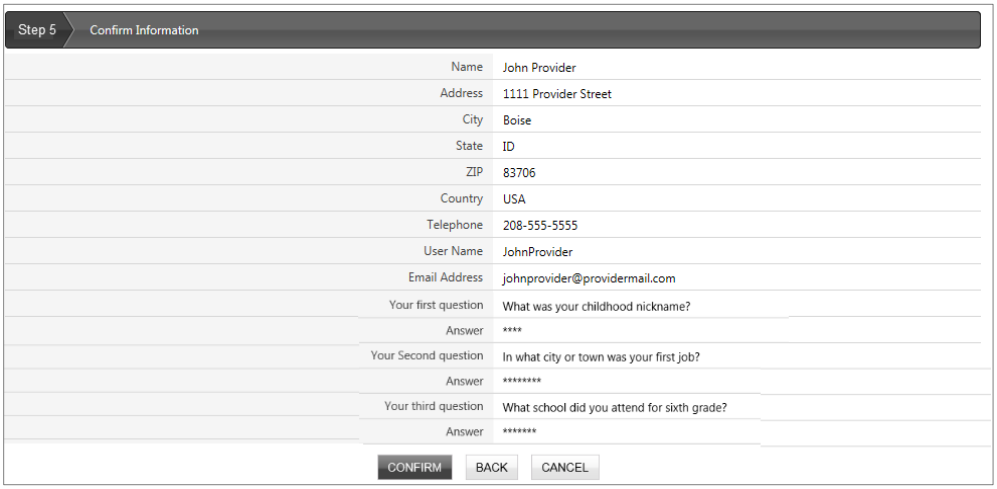
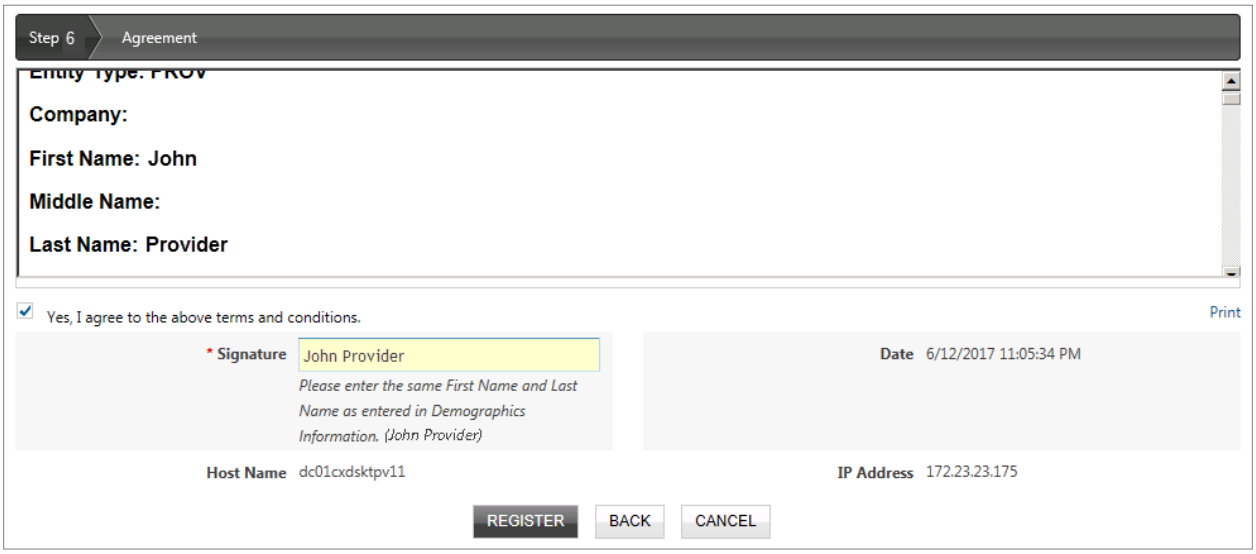
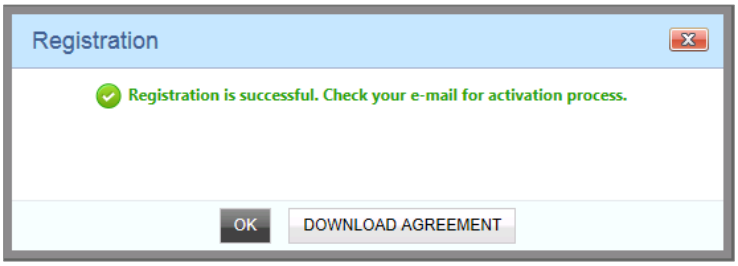


Figure 2-10: Agreement



Once the registration agreement has been completed, the TPA registration will be processed. A confirmation message will display and an e-mail will be sent with further activation instructions.

Figure 2-11: Registration Confirmation



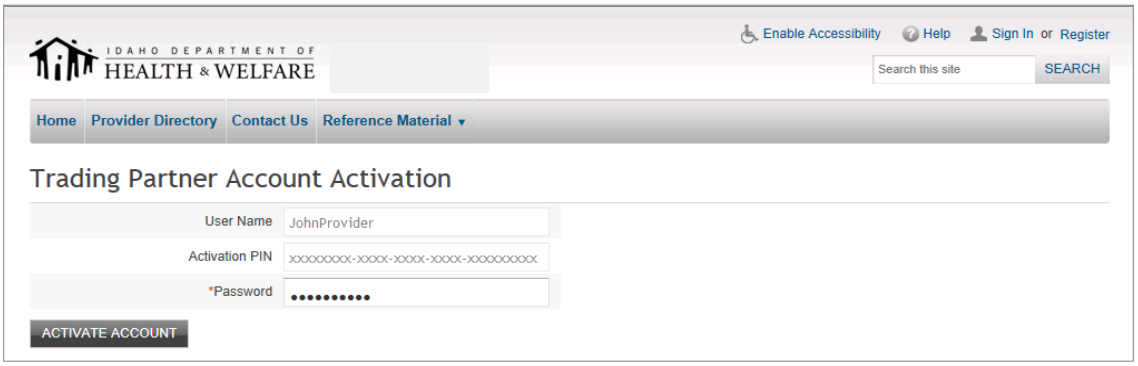
After selecting **OK**, you will be redirected to the home page. You will **not** be able to log into your account until it is activated. See the following section for activation instructions.

3. ACCOUNT ACTIVATION

An account activation e-mail will be sent to the TPA administrator.

1) Select the link in the e-mail to go to the activation page.
2) On the TPA *Activation* page, enter the password chosen during registration in the Password box (Figure 3-1).
   Note: Please be sure to look in your SPAM folder if you do not find the activation e-mail in your inbox.
3) Select **ACTIVATE ACCOUNT**. Your account will now be activated and you may proceed to sign in.

Figure 3-1: Account Activation Page



If you receive an error message during account activation, call Gainwell Technologies EDI support at 1 (866) 686-4272 or e-mail idedisupport@gainwelltechnologies.com and request a manual activation for your account.

4. SIGN IN TO TPA

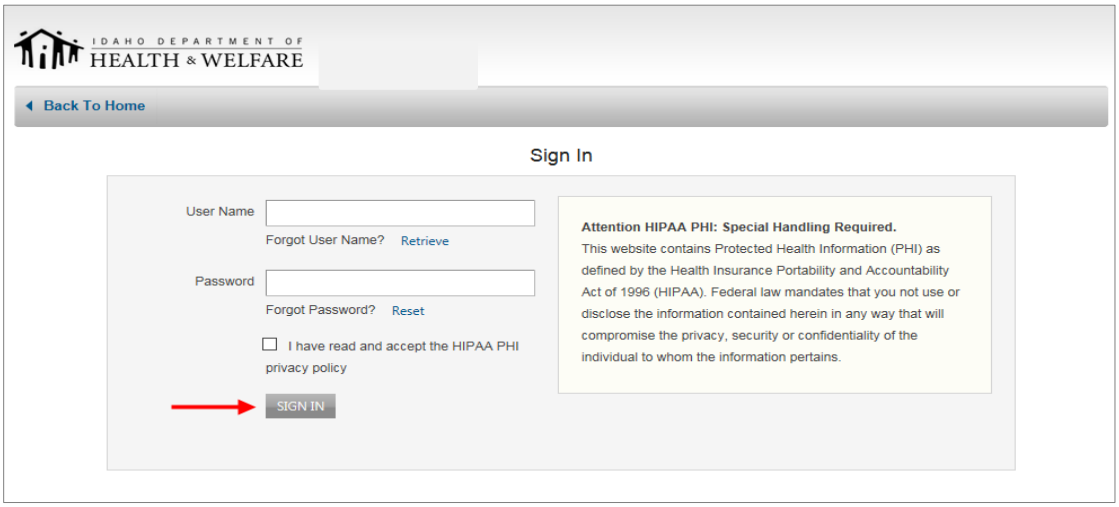
Select the **Sign In** link on the Idaho Gainwell Technologies Medicaid website homepage (Figure 4-1).

Figure 4-1: Sign In Link

The Sign In page (Figure 4-2) will display.

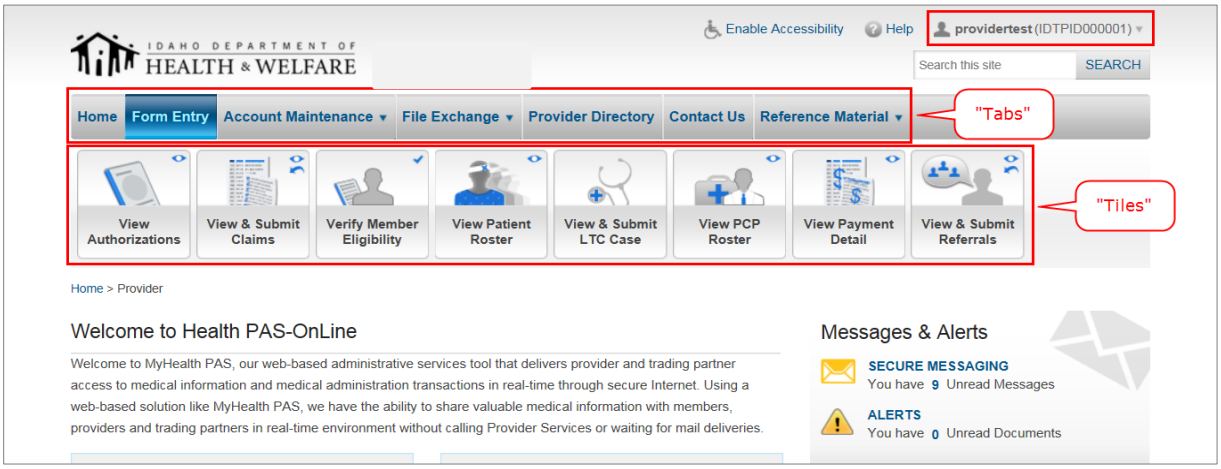
1) Enter your User Name and Password.
2) Select the "I have read and accept the HIPAA PHI privacy policy" check box.
3) Select **SIGN IN**.

Figure 4-2: Sign In



You can verify you are logged into your account if your user name and Trading Partner ID display in the upper right-hand corner of the screen (Figure 4-3). The Tabs and Tiles that display depend on your TPA type.

Figure 4-3: Trading Partner Account Secure Tabs



4.1. Multiple Sessions Warning

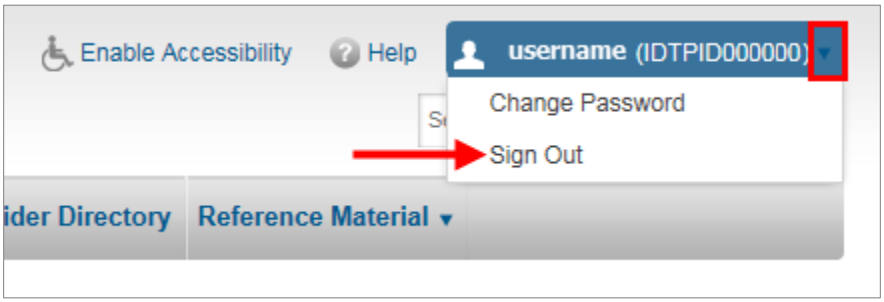
While working in your TPA, it is important to have only one tab open at a time in your internet browser. Opening multiple tabs during the same session can cause the system to time out and unexpectedly close your session.

4.2. Ending Your TPA Session Correctly

Do **NOT** use the X in the top right corner of the screen to close your TPA session. This will cause you to be locked out of your account.

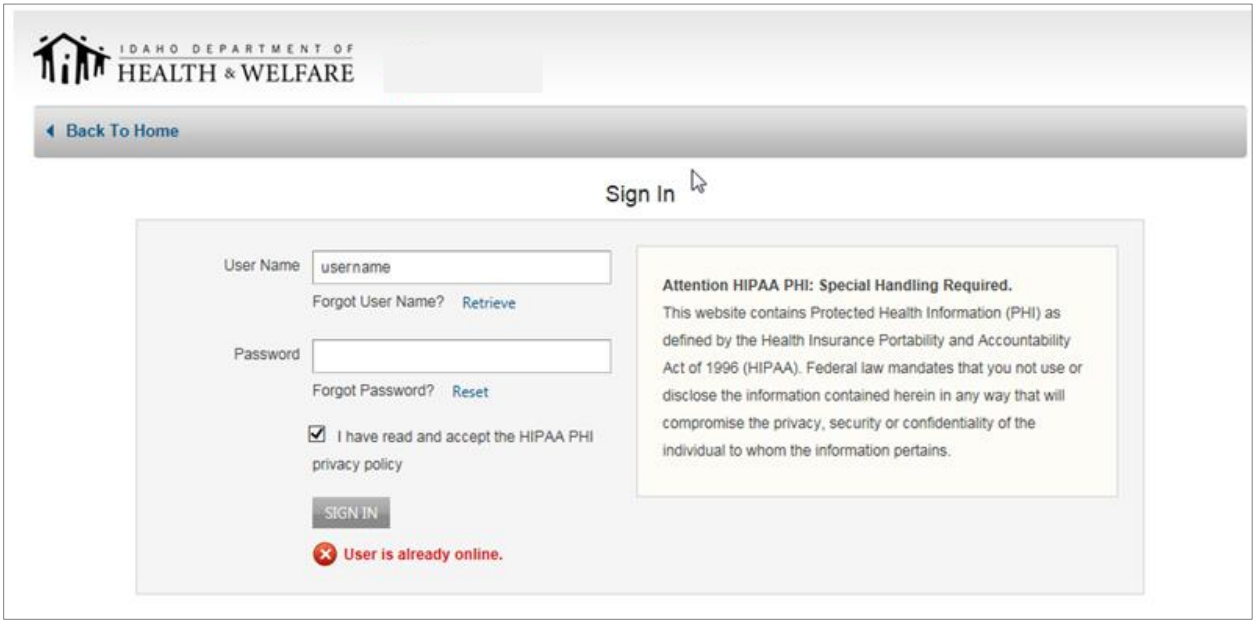
Instead, use the drop-down arrow next to your username to select Sign Out (Figure 4-4).

Figure 4-4: Sign Out Link



If you do not sign out of your TPA correctly, or if your session unexpectedly closes, you will receive the following message (Figure 4-5) and will need to wait 20 minutes before logging back in.

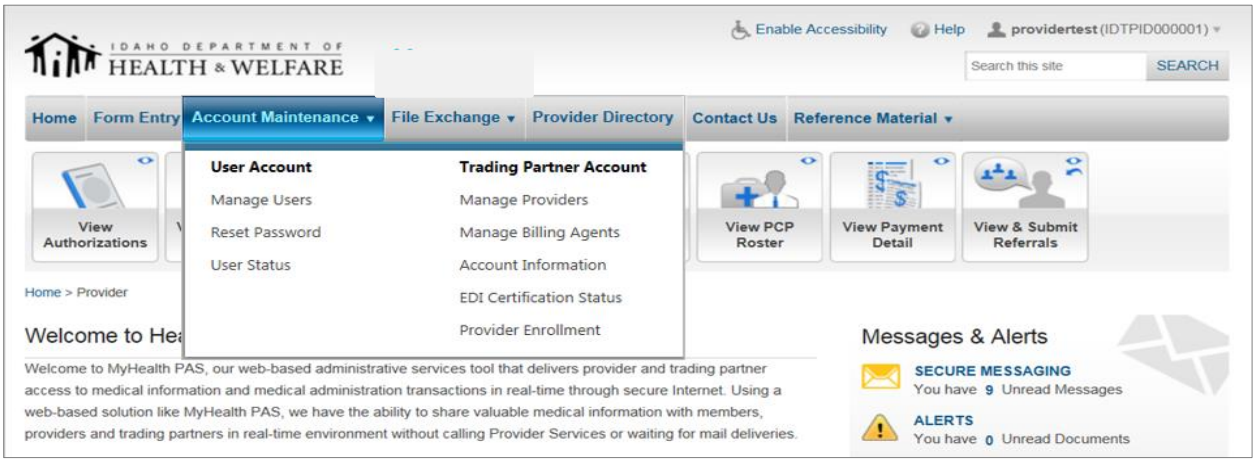
Figure 4-5: "User is already online" Message



5. ACCOUNT MAINTENANCE

Use these links to manage your TPA. Options available under **Account Maintenance** depend on your TPA type.

Figure 5-1: Account Maintenance Links



The person who registers the TPA is the first account administrator and can do the following:

- Manage users
- Add additional administrators
- Access provider associations
- Reset password
- Manage TPA information (i.e., demographic edits)

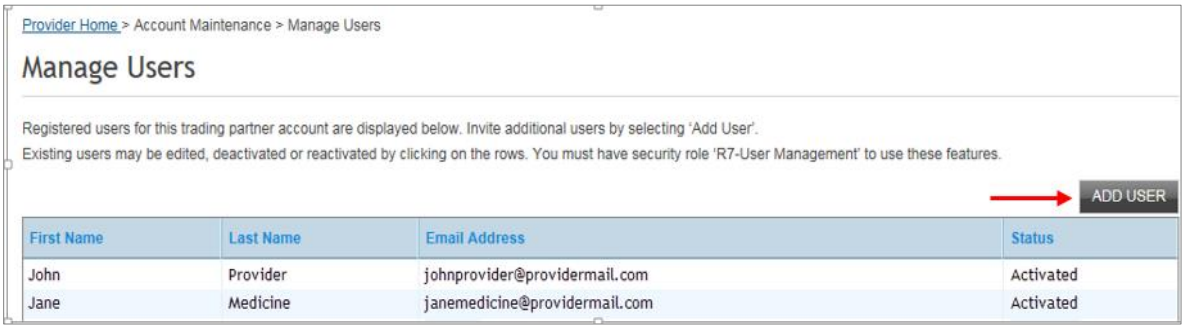
5.1. Manage Users

5.1.1. Add User

The administrator may add users, including additional administrators, and give access to specific functions on the site. The description of user roles can be found in Figure 5-4.

1) Select **ADD USER** (Figure 5-2).

Figure 5-2: Manage Users



2) Fill in the **First Name**, **Last Name**, and **E-mail Address** fields for the new user (Figure 5-3).
3) Select the appropriate user role checkboxes.
    a. To create an additional administrator for the account, choose the *Select All* checkbox so that all user roles are assigned.
4) Select **SUBMIT** to add user or **CANCEL** to exit the transaction without saving.

Once the new user is added, that individual will receive an e-mail with instructions to set up their user name, password, and security question.

Figure 5-3: Add User

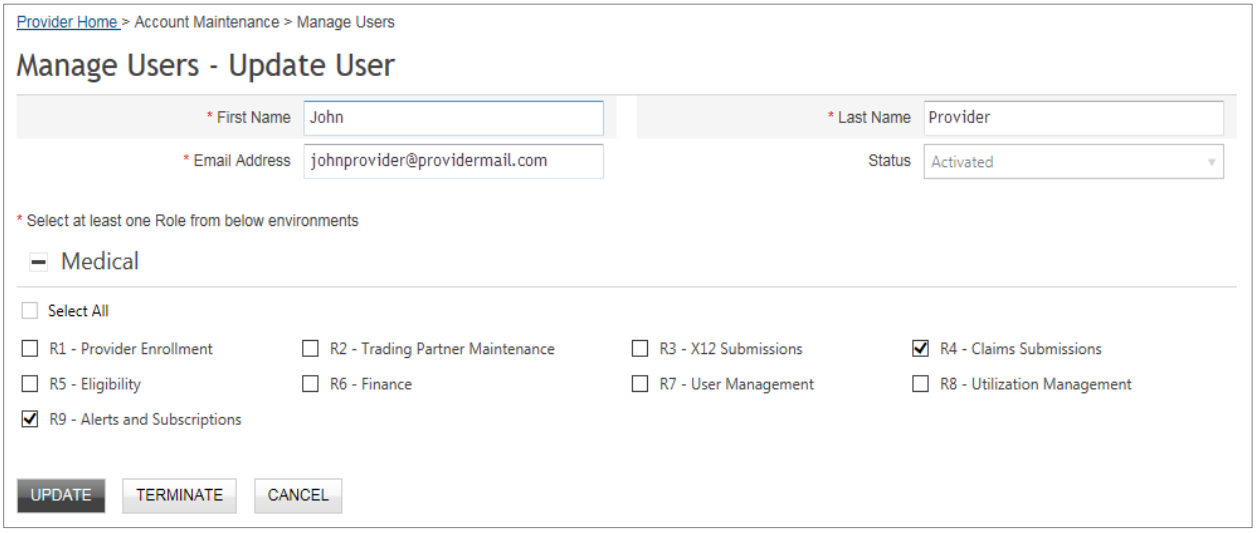


Figure 5-4: User Roles

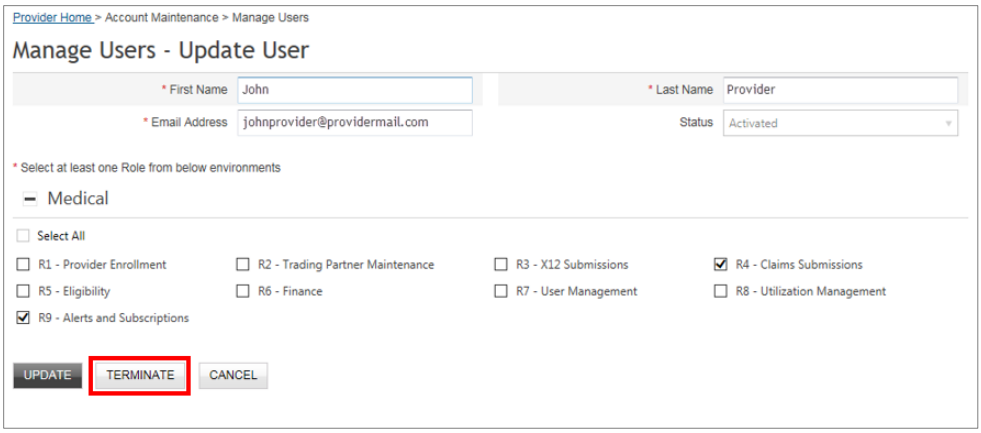
User Role	Definition
Select All	Designates the user as an administrator.
R1 – Provider Enrollment	Provides access to provider enrollment case status. **Note:** Any user who is granted this role must be listed on the Ownership details within the Provider Enrollment Application.
R2 – TPA Maintenance	Allows the user to view or change the contact information for the TPA. This is the information entered on Step 1 of the registration.
R3 – X-12 Submissions	Provides access to the *File Exchange* to upload the X-12 file. Grants access to a user to view the static Healthy Connections roster.
R4 – Claims Submissions	Allows the user to: • Manually enter claims • Reverse, adjust, and adjudicate claims
R5 – Eligibility	Provides the user with detailed information regarding the member's eligibility.
R6 – Finance	Provides access to claim, and Healthy Connections roster payment details.
R7 – User Management	Allows the user to: • Invite new users to the account • Determine the access of the users on the TPA. **Note:** Any user who is granted this role must be listed on the Ownership details within the Provider Enrollment Application.
R8 – Utilization Management	Allows the user to: • View the member's prior authorization information • View and submit Healthy Connection referrals **Note**: Access to R5 – Eligibility is required to view this information.
R9 – Alerts and Subscriptions	Sends e-mails to the user advising of any system updates.

5.1.2. Terminate User Access

TPA administrators may terminate users as needed by following these steps:

1) On the *Manage Users* screen, select the name of the user you wish to terminate. The *Update User* window expands to show the user selected.
2) Select **TERMINATE** (Figure 5-5). The online portal saves the changes and refreshes the user's status. **Note**: Once you select **TERMINATE**, the action will be performed immediately and the user is notified by e-mail. Do not select this button unless you are certain you wish to terminate the user's account.

Figure 5-5: Manage Users – Terminate User



IMPORTANT NOTE: If the account administrator is the only user account on the TPA, terminating this user **will terminate the entire TPA record**.

If the known administrator is no longer supporting the provider's office to maintain and manage access, or if the billing agency set up the provider's account, please call 1 (866) 686-4272 in order for us to identify other administrator(s) at your office that may assist.

If the current administrator(s) is no longer employed/managing the TPA at the provider's office, an individual who is currently listed on the ownership details may send an email to idedisupport@gainwelltechnologies.com, from their current company email, requesting a change to the administrator details on record. Please attach a letter on company letterhead, physically signed and dated, include the following information on the letter:

- TPA username on file and the first and last name of previous administrator
- Current e-mail address on file associated to the previous administrator
- IDTPID or NPI
- First and last name of the new administrator
- E-mail address of the new administrator

For security purposes and to mitigate risk, the Trading Partner Account administrator(s) are required to be listed on the Ownership information on file, at a minimum, as a Managing Employee. These individuals are granted full access to all areas of the Trading Partner Account and have security clearance to grant/terminate access to all other users.

You will receive a response to your inquiry on the same or next business day. Once the update has been completed, additional information will be provided via email to the requestor.

In an effort to enhance security, Gainwell Technologies will evaluate all Trading Partner Account users and terminate those user accounts which have not actively been used in the past 365 days. A notification will be sent to the email address associated to the user's account when identified for termination, 30 days prior to the termination taking place. Following the termination another notification will be delivered.

If a user receives the notification and wishes to have their account remain active, they should simply login to their account. If a user's account was terminated and access needs to be restored, their Trading Partner Account Administrator must invite them back to the account.

5.2. Change or Correct a User E-mail Address

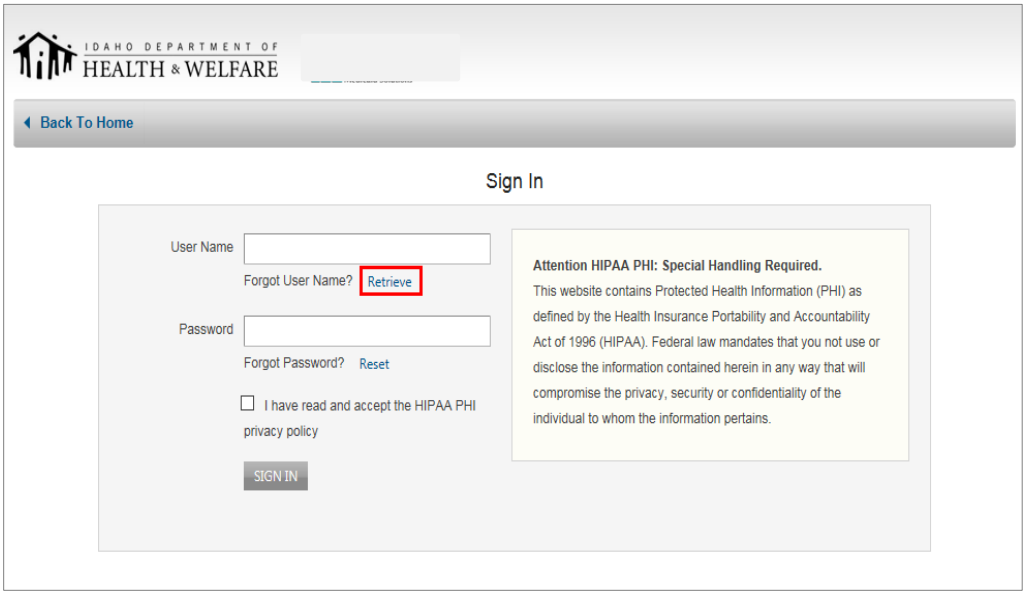
The TPA account administrator may change or correct an e-mail address for any user by following these steps.

1) In the *Manager User* screen select the name of the user whose e-mail address needs a change or correction. The *Update User* screen will display.
2) In the **Email Address** field, enter the updated e-mail address.
3) Select **UPDATE** to save.

5.3. Retrieve TPA User Name

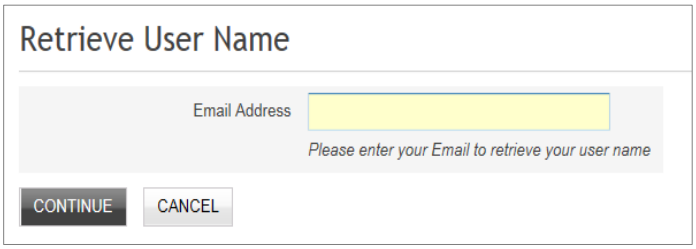
If the user name for the TPA is lost or forgotten, the user can retrieve it by choosing the **Sign In** link on the homepage and then selecting the **Retrieve** link next to "Forgot User Name?" (Figure 5-6).

Figure 5-6: Retrieve User Name



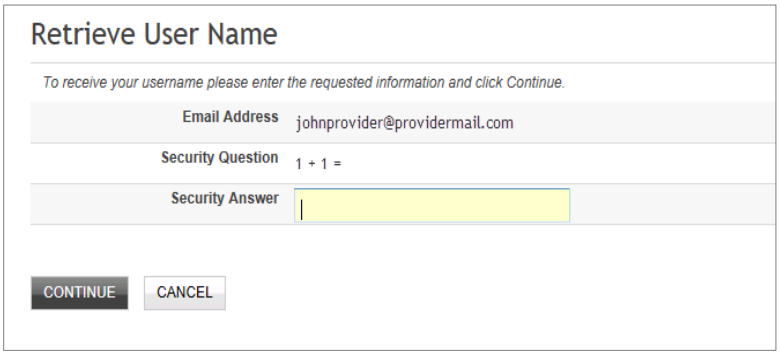
After selecting the link, the *Retrieve User Name* pop-up screen will display (Figure 5-7). Type the e-mail address that is associated to the user name and select CONTINUE.

Figure 5-7: Enter Email Address



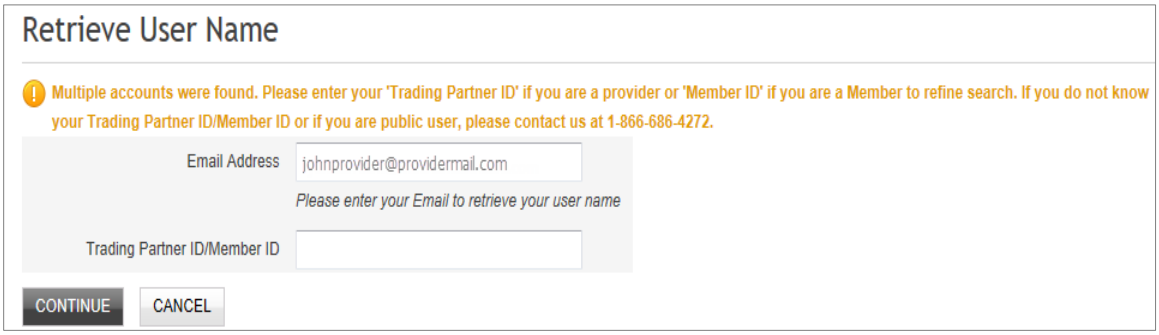
The security question screen will display (Figure 5-8). Type the answer to the security question and select **CONTINUE**. If the answer to the question is correct, the system sends an e-mail with the user name and displays a confirmation message.

Figure 5-8: Security Question



Note: If the e-mail address entered is associated with multiple trading partner accounts, the confirmation message will display an error (Figure 5-9).

Figure 5-9: Multiple Accounts Found



Enter the **Trading Partner ID** and select **CONTINUE**. (This number was e-mailed when the trading partner account was created and is also used as the sender ID for X12 submissions).

If the TPA ID is unknown, call Gainwell Technologies EDI support at 1 (866) 686-4272 or e-mail idedisupport@gainwelltechnologies.com and request assistance.

5.4. Change User Name

A user name cannot be changed. If necessary, the account administrator can terminate the existing account and create a new invitation for a user who may need to change their user name. The user name is retained for historical purposes.

5.5. Reset Password

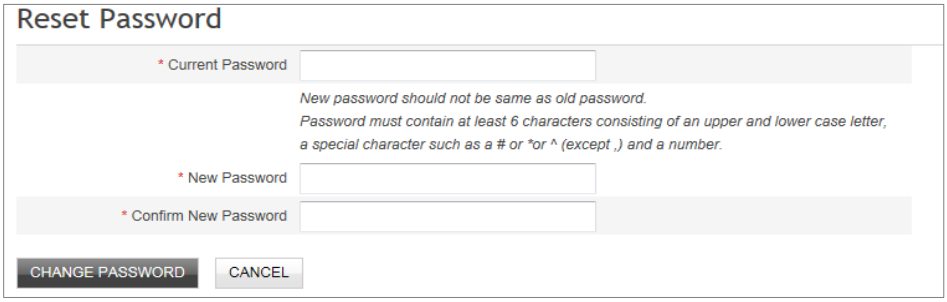
Users can reset passwords. All TPA passwords must be changed every 60 days.

5.5.1. Resetting When the Current Password Is Known

Select the **Reset Password** link in the **Account Maintenance** menu and follow the steps below.

1) Enter the **Current Password**.
2) Enter the **New Password**. Note: Passwords must be at least eight characters long and contain at least one each of:
    a. Upper case letter
    b. Lower case letter
    c. Special character (such as an asterisk *)
    d. Number
    e. Cannot contain spaces
3) Enter the same new password in the **Confirm New Password** field.
4) Select **CHANGE PASSWORD**.

Figure 5-10: Reset Password Screen

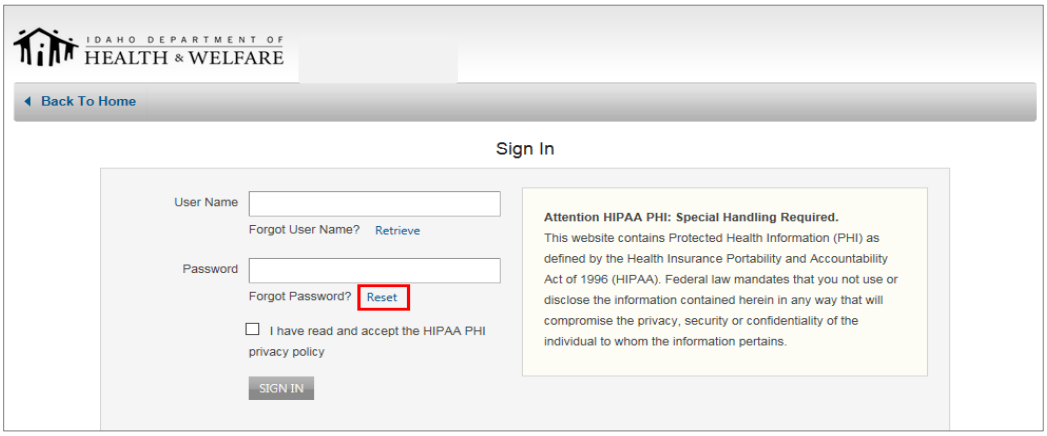


A confirmation message will display. Select **OK** to continue. The homepage will display.

5.5.2. Resetting When the Current Password Is Unknown

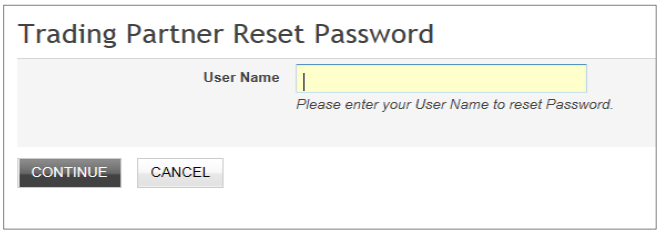
If the current password for the TPA user name is lost or forgotten, reset it from the *Sign In* page. Choose the Sign In link on the homepage and then select the Reset link next to "Forgot Password?" (Figure 5-11). The *Trading Partner Reset Password* pop-up box will display (Figure 5-12).

Figure 5-11: Reset Password



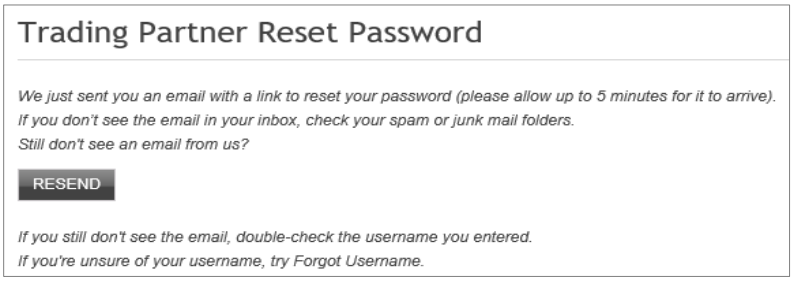
Specify the trading partner User Name in the box and select **CONTINUE**.

Figure 5-12: Trading Partner Reset Password



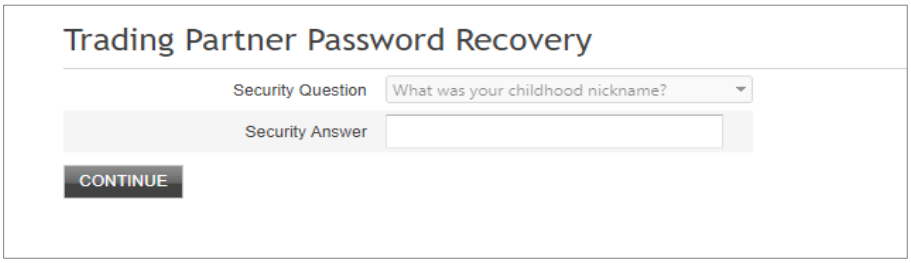
The Trading Partner Reset Password screen displays a message on screen with instructions. A password reset email will be sent within five minutes with a link to reset your account password. If you do not receive the email in your inbox, check your spam or junk mail folders. The user is presented an option to **RESEND** the email if it's not received within five minutes.

Figure 5-13: Trading Partner Reset Password Messages



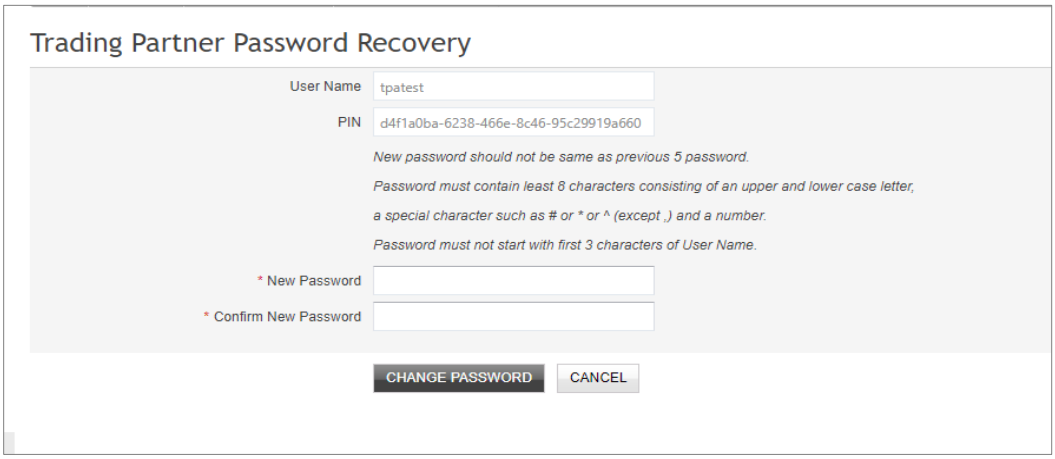
The email will contain a link, which is used to create the new password. After selecting the link, the user will be prompted to answer a security question that was established. The security answer is not case sensitive. Enter the answer and select **CONTINUE**.

Figure 5-14: Password Recovery Page



1) Enter the new password in the **New Password** field. **Note**: The new password should not be the same as the previous five passwords. Passwords must be at least eight characters long and contain at least one each of:
    a. upper case letter
    b. lower case letter
    c. special character (such as an asterisk *)
    d. number
    e. cannot contain spaces
    f. cannot begin with the first three characters of the User Name
2) **Confirm New Password** by retyping the password.
3) Select **CHANGE PASSWORD**. A confirmation message will display.

Figure 5-15: Password Recovery Screen



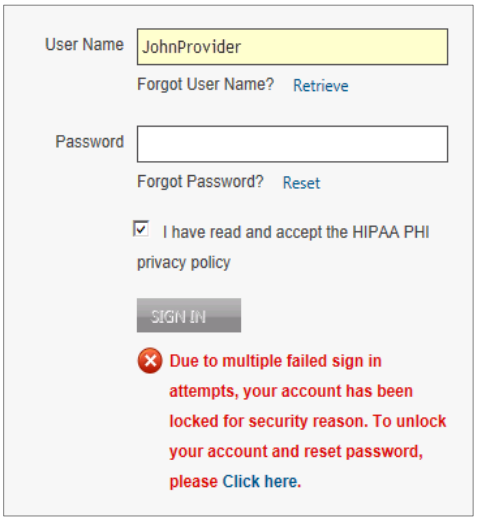
5.5.3. Password Reset is Unsuccessful

If you are unable to successfully reset the password, contact Provider Services for support toll-free at 1 (866) 686-4272, or locally at 1 (208) 373-1424.

5.6. Reset Locked TPA Account

After five failed attempts to sign into a trading partner account, the portal will display a message that the user's account has been locked (Figure 5-16). To unlock the account, follow the steps below.

Figure 5-16: "Lock-out" Message



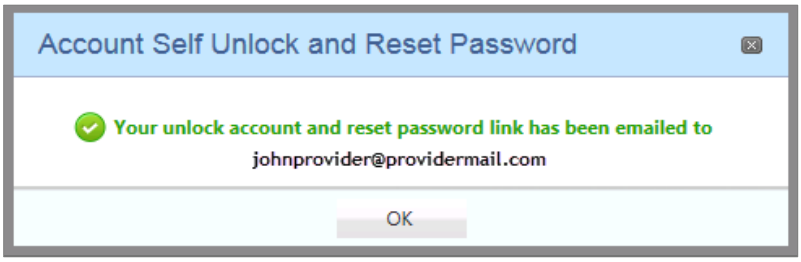
Select the **Click here** link in the lock-out message. The Account Self Unlock and Reset Password box (Figure 5-17) will display.

Enter the **Security Answer** (Figure 5-17).

Figure 5-17: Account Self Unlock and Reset Password

Select UNLOCK ACCOUNT. A confirmation will display (Figure 5-18).

Figure 5-18: Unlock Account E-mail Confirmation

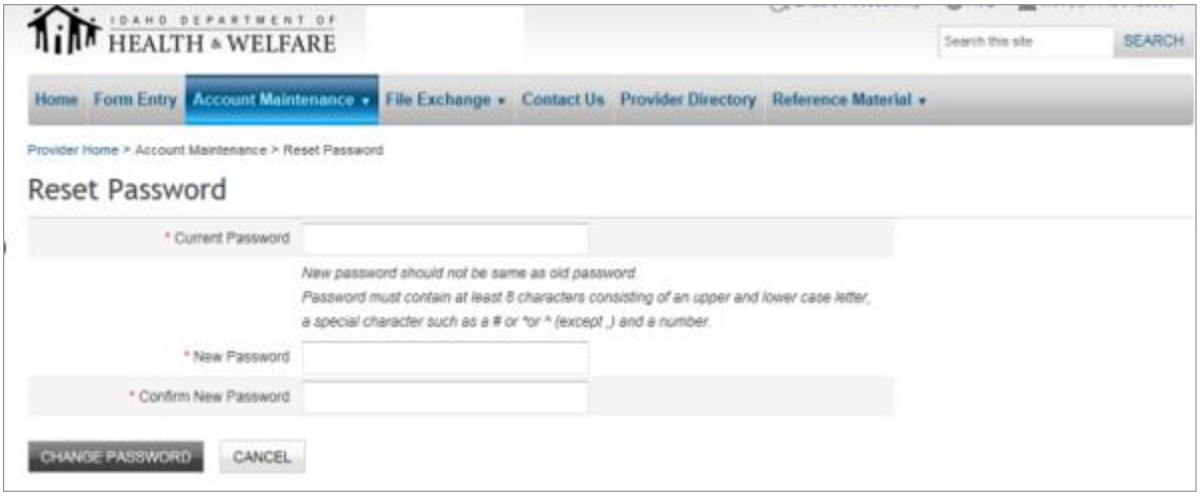


1) Select **OK**.

The system will send an e-mail that contains a link to unlock the account and reset the password.

Select the link in the e-mail or copy and paste it into the browser. A pop-up box will display with the *Trading Partner Password Recovery* screen (Figure 5-19).

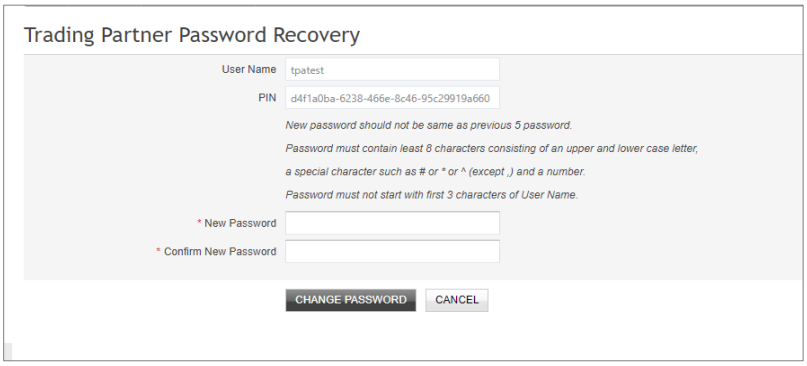
Figure 5-19: Password Recovery Screen



To complete the process, follow the steps below.

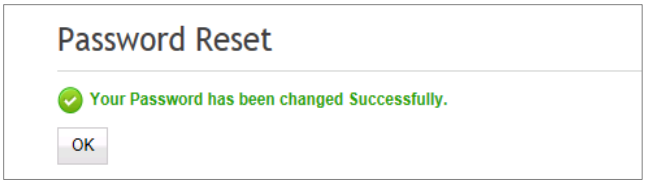
1) Enter the **New Password**. Note: Passwords must be at least eight characters long and contain at least one each of:
    a. Upper case letter
    b. Lower case letter
    c. Special character (such as an asterisk *)
    d. Number
    e. Cannot contain spaces
    f. Cannot start with the first three characters of the user name
2) **Confirm New Password** by retyping the password exactly as typed in the **New Password** box.
3) Select **CHANGE PASSWORD**. A confirmation message will display.

Figure 5-20: Enter New Password and Security Question



The **Password Reset** pop-up box will appear, letting you know that the account has been unlocked and password changed successfully.

Figure 5-21: Password Reset Pop-up



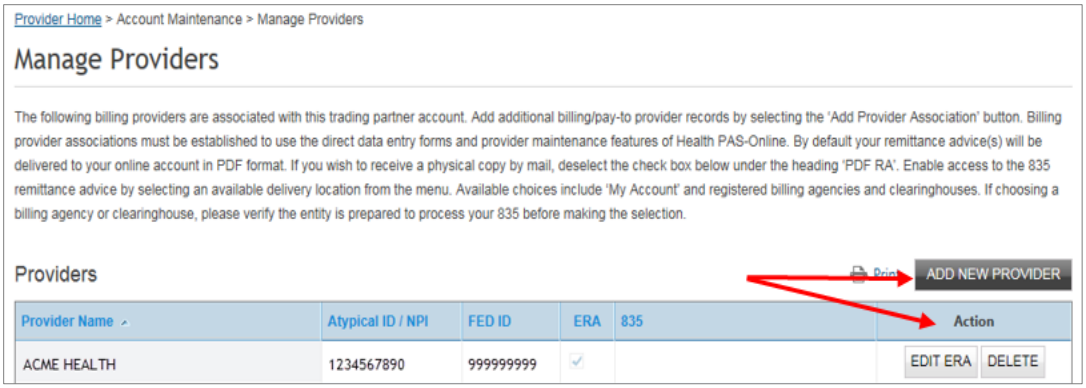
6. MANAGE BILLING PROVIDERS

Multiple Pay To providers with a NPIs or Atypical IDs can be affiliated to a TPA account allowing the primary TPA to be used for billing.

To add a provider, select the **Manage Providers** link to display the billing providers linked to the TPA. On this page, you can do to the following:

a) Add a new provider.
b) Delete a provider from the TPA.
c) Edit the electronic remittance advice (ERA) preferences for a provider.

Figure 6-1: Provider Associations

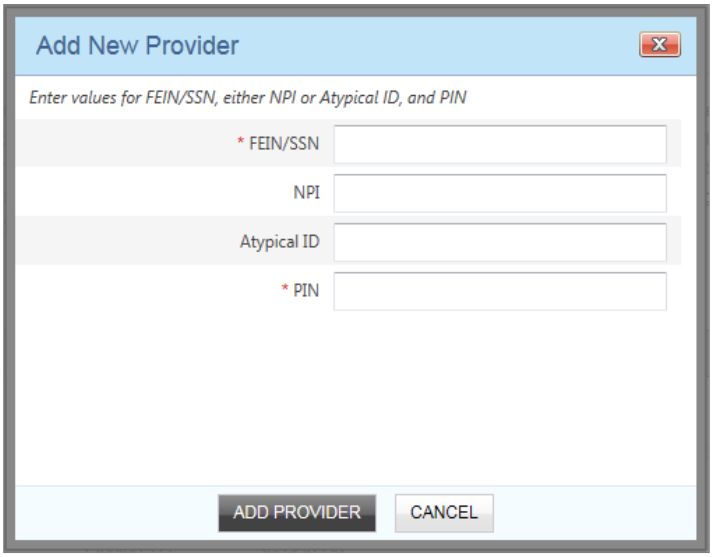


Manage Providers information can only be updated by the administrator; to complete the process, follow the steps below.

Add Billing Provider

1) Select **ADD NEW PROVIDER**. A form will display with the FEIN/SSN, NPI, Atypical ID, and PIN fields (Figure 6-2).

Figure 6-2: Add Provider to Trading Partner Account



2) Enter the FEIN/SSN.
3) Enter either the NPI or Atypical ID numbers.
4) Enter the PIN number. (PIN is the provider enrollment case number assigned during Provider Record Update or new enrollment.)
5) Select **ADD PROVIDER** or **CANCEL** to exit the transaction without saving.

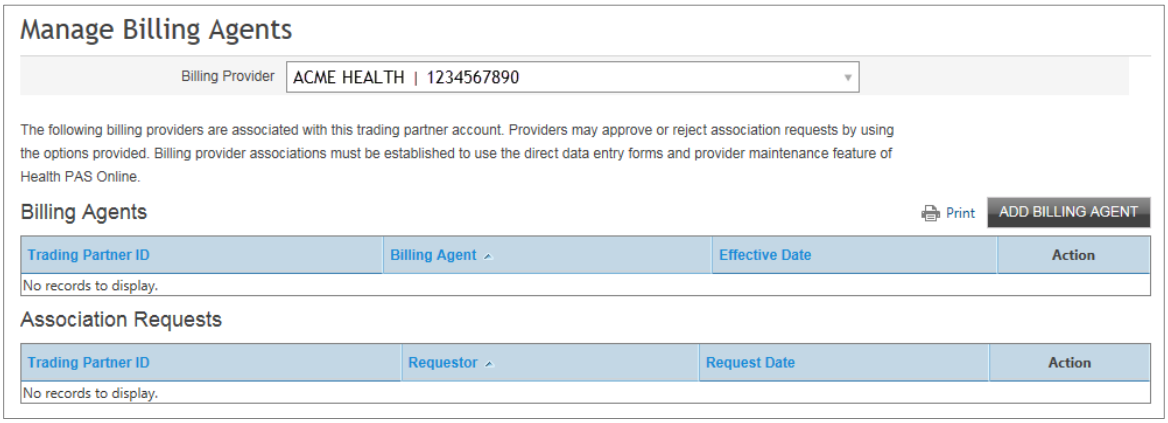
7. MANAGE BILLING AGENT ASSOCIATION

7.1. Provider-Initiated Request to Associate to Billing Agent

Follow the steps below for each provider that you want associated to the billing agent.

1) Under Account Maintenance, select Manage Billing Agents. The *Manage Billing Agents* screen will display (Figure 7-1).
2) Select the billing provider from the drop-down. Note: A list of current Billing Agents associated to the provider will display; if none exist, you will see the message "No records to display."

Figure 7-1: Manage Billing Agents



3) Select **ADD BILLING AGENT.** The *Add Billing Agent* pop-up box will display.
4) Enter the billing agent **Trading Partner ID**, if known.
5) Enter the **Billing Agent/Clearinghouse Name**.
6) Select **SEARCH**. Search results will display.
7) Check the box of the billing agent to be associated to the TPA.
8) Select **CREATE ASSOCIATION**. A confirmation message will display.

Figure 7-2: Add Billing Agent

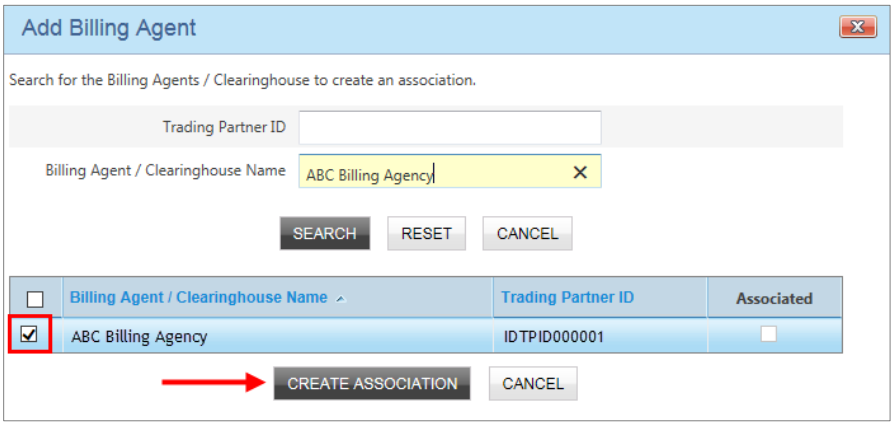
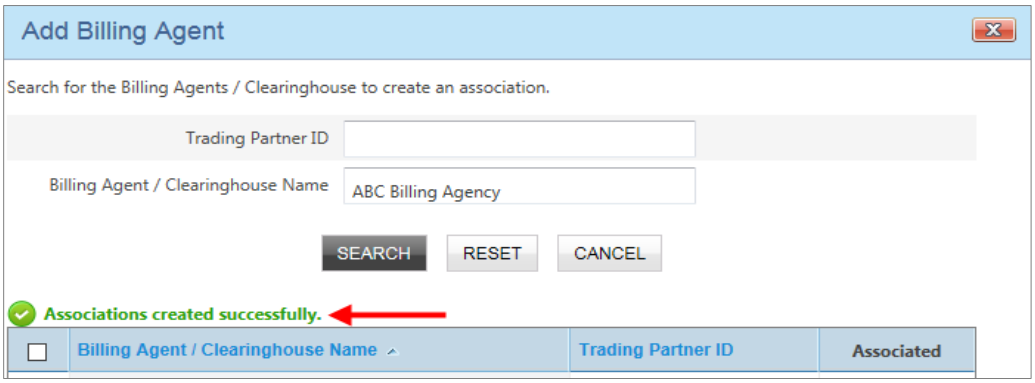
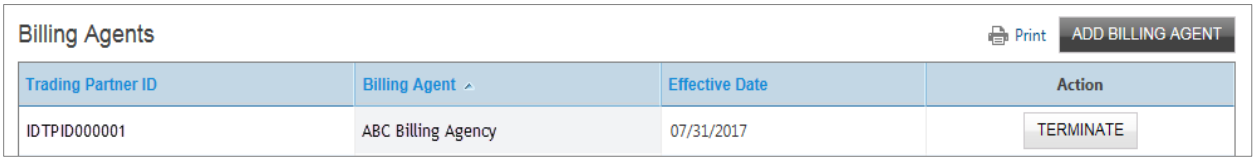


Figure 7-3: Add Billing Agent Confirmation



When you exit out of the *Add Billing Agent* pop-up box, the billing agent association and effective date will be displayed under the **Billing Agents** heading (Figure 7-4). A notification will be sent to the billing agent's Secure Messaging account (see the *Trading Partner Account User Guide* for more information on Secure Messaging).

Figure 7-4: New Billing Agent Association

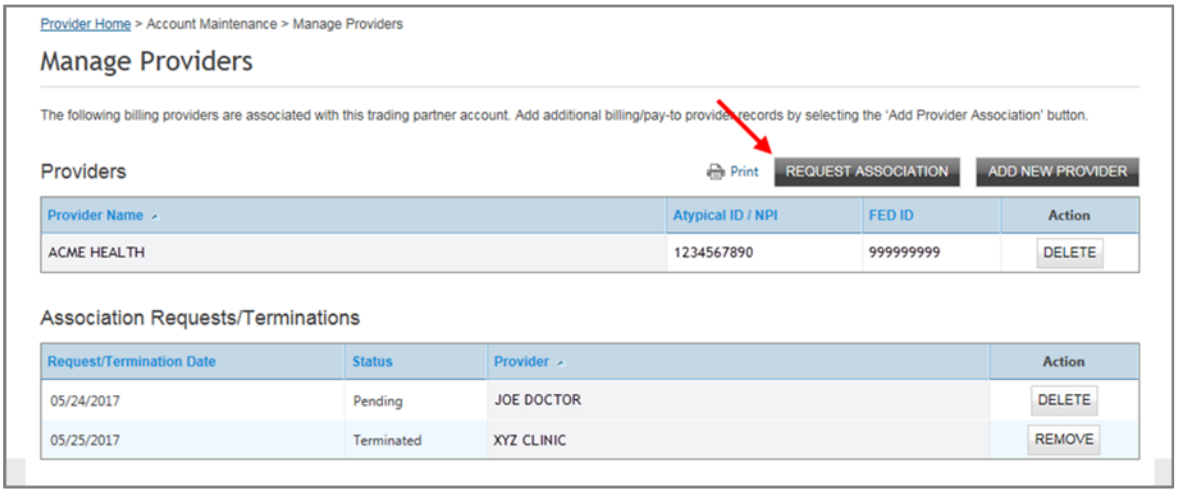


7.2. Billing Agent – Associate to Provider Account

Billing agents must have the provider's Atypical ID or NPI to request an association to a provider TPA.

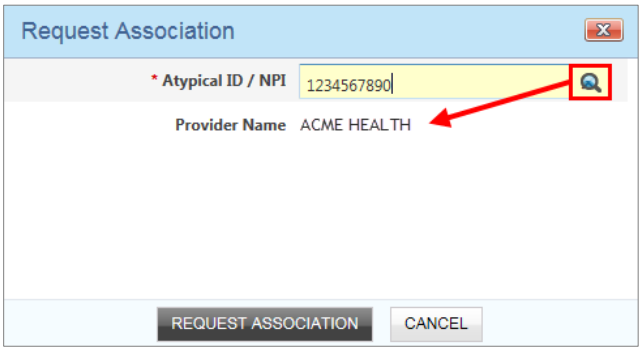
1) Under **Account Maintenance**, select **Manage Providers**. The *Manage Providers* screen will display.
2) Select **REQUEST ASSOCIATION** (Figure 7-5). The *Request Association* pop-up box will display.

Figure 7-5: Manage Providers – Request Association



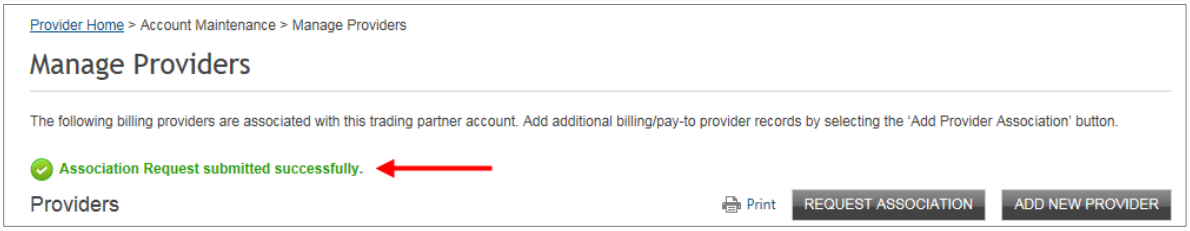
3) In the **Atypical ID/NPI** field, enter the provider's ID or NPI.
4) Select the search icon. The Provider Name field will populate with the name associated to the provider ID or NPI entered (Figure 7-6).

Figure 7-6: Request Association – NPI Search



5) Select **REQUEST ASSOCIATION**. The *Request Association* pop-up box will close and a request confirmation message will display (Figure 7-7). A notification will be sent to the provider's Secure Messaging account (see the *Trading Partner Account User Guide* on www.idmedicaid.com for more information on Secure Messaging).

Figure 7-7: Association Request Confirmation



7.3. Accept or Reject a Billing Agent's Association Request

A provider must accept or reject a billing agent request for TPA association.

To accept or reject a billing agent's association request:

1) Under Account Maintenance, select Manage Billing Agents. The *Manage Billing Agents* page will display (Figure 7-8).
2) Review the requests under **Association Requests**. For each request, select **APPROVE** or **REJECT**.
    a. Approved requests will now display under the **Billing Agents** section. A confirmation of the approval will display (Figure 7-9).
    b. Rejected requests will be removed from the **Association Requests** section. A confirmation of the rejection will display.
    c. The Billing Agent will receive a secure message showing the status of the Association Request.

Figure 7-8: Billing Agent Association – Approve and Reject

Figure 7-9: Billing Agent Approval Confirmation

7.4. Terminating a Billing Agent Association

To terminate a billing agent association, follow the steps below.

1) Under Account Maintenance, select Manage Billing Agents. The *Manage Billing Agents* page will display (Figure 7-10).
2) Locate the billing agent association you wish to terminate. Select TERMINATE (Figure 7-10).
3) When prompted, confirm that you wish to terminate the association. The billing agent will no longer be listed under the *Billing Agents* heading and the billing agent will no longer have the ability to perform TPA functions on behalf of the provider.

Figure 7-10: Terminate

If you wish to re-establish the association to the terminated billing agent at a later time, follow the steps under *7.1 Provider-Initiated Request to Associate to Billing Agent*.

8. ACCOUNT INFORMATION

This allows the TPA administrator to update demographic information. To update, select **EDIT** (Figure 8-1).

The *Trading Partner Status* page displays (Figure 8-2). Update the necessary information and **SAVE** or **CANCEL** to exit the transaction without saving.

Figure 8-1: Account Information

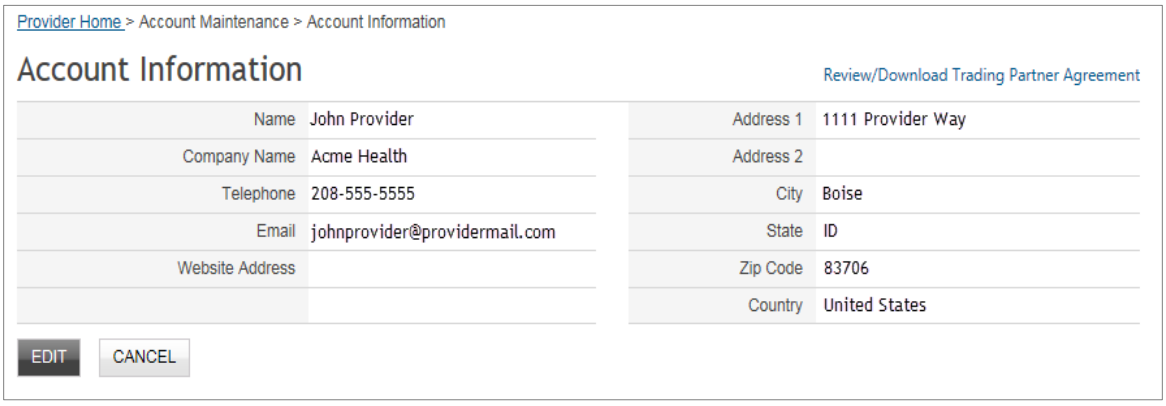
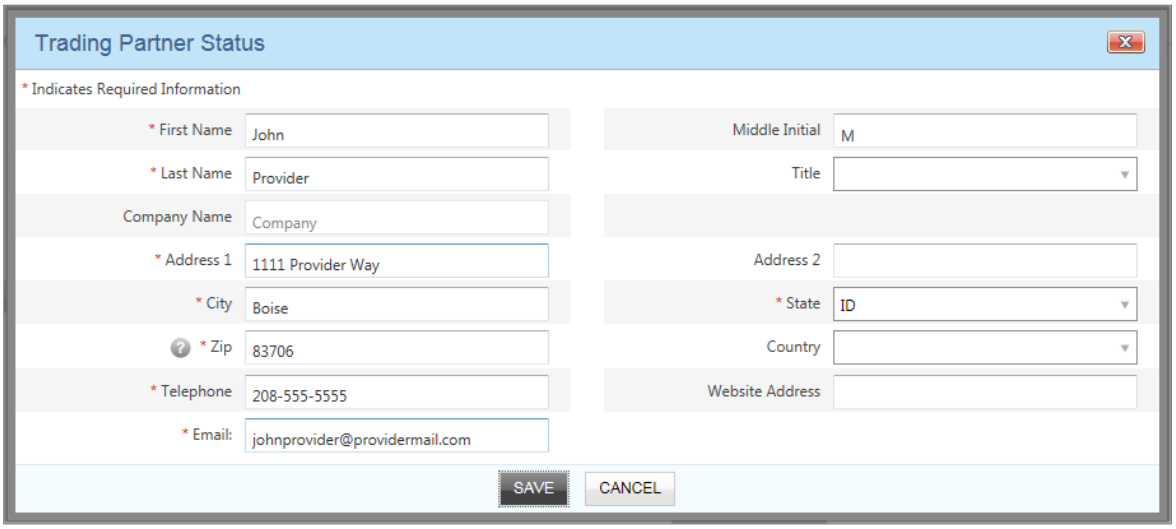


Figure 8-2: Trading Partner Status

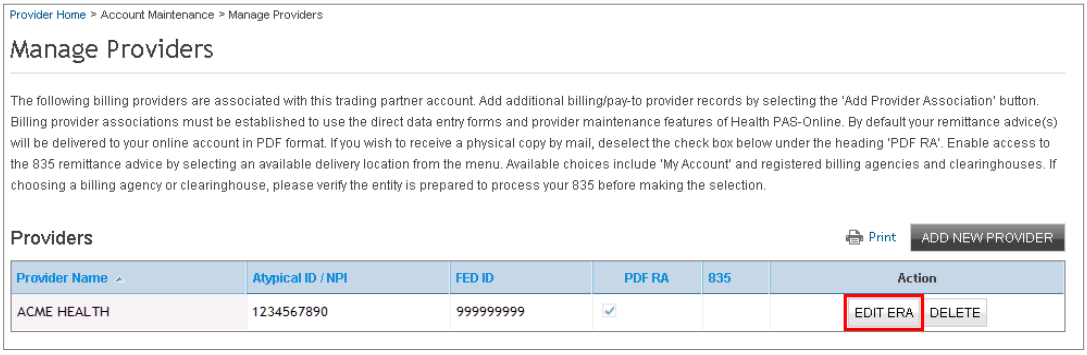


9. 835 Routing and Version Selection

Users with a TPA type of *Provider – Already Enrolled, Clearinghouse,* or *Billing Agent* have the option of receiving the X12 HIPAA 835 Electronic Remittance Advice (ERA) file by navigating to the **Manage Providers** link under the **Account Maintenance** tab.

1) Select the **Manage Providers** link under the **Account Maintenance** tab.
2) Select the **EDIT ERA** button on the list of billing providers associated to the trading partner account (Figure 9-1). The Electronic Remittance Advice (ERA) Authorization Agreement will display.

Figure 9-1: Edit Billing Providers



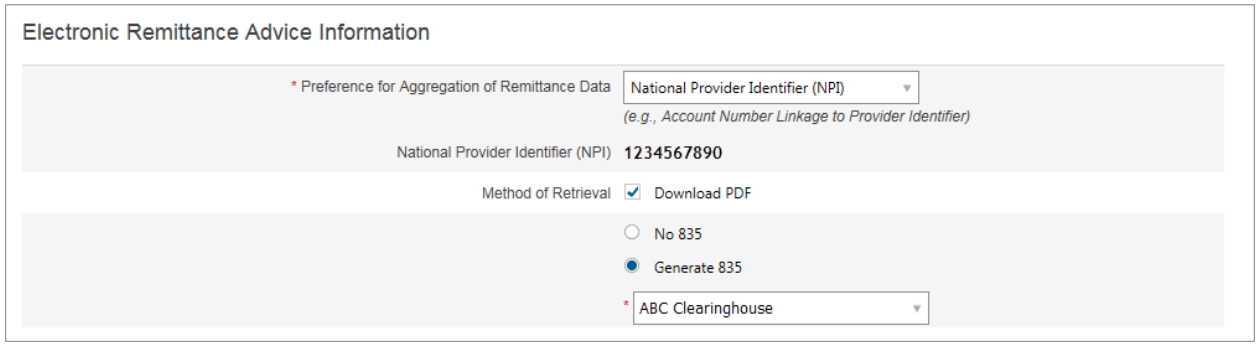
3) Scroll down to the *Electronic Remittance Advice Information* heading. Under *Method of Retrieval,* select the desired location for the file to be sent.
    a. The **Download PDF** checkbox is checked by default; when checked, you will receive your remittance advice (RA) electronically. If you wish to receive a paper RA in the mail, uncheck this box.
    b. Choose the appropriate radio button to determine your 835 file preferences.
        i. **No 835**: Select this option if you wish to opt out of receiving an 835.

ii. **Generate 835**: Select this option to display a drop-down of your associated providers, billing agents, and clearinghouses; then select entity who will receive the 835 for processing.

4) Review the **Reason for Submission** and **Authorized Signature**. Completed **Electronic Signature** and **Requested ERA Effective Date** under the *Submission Information* heading, and then select the **UPDATE** button.

Note: The Requested ERA Effective Date must be the current or future date.

Figure 9-2: 835 Routing Selection Options

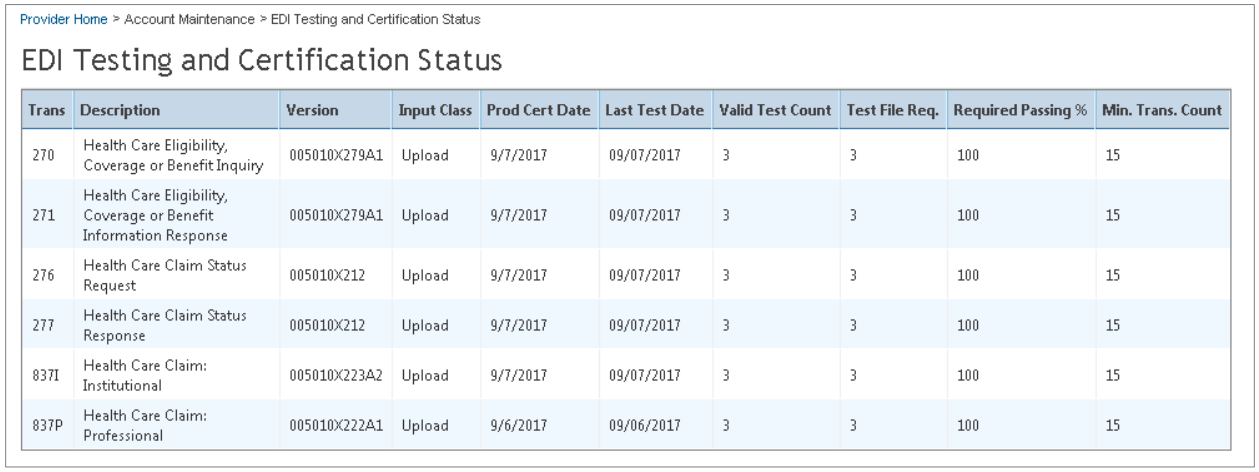


10. EDI CERTIFICATION STATUS

All providers or entities who wish to submit X12 EDI claims must be individually certified to submit production EDI transactions. For instructions on testing files for certification, refer to the respective document at the **Companion Guide** link under the **Reference Material** tab.

The *EDI Certification Status* screen shows the status of the test files.

Figure 10-1: EDI Testing and Certification Status



Trans	Description	Version	Input Class	Prod Cert Date	Last Test Date	Valid Test Count	Test File Req.	Required Passing %	Min. Trans. Count
270	Health Care Eligibility, Coverage or Benefit Inquiry	005010X279A1	Upload	9/7/2017	09/07/2017	3	3	100	15
271	Health Care Eligibility, Coverage or Benefit Information Response	005010X279A1	Upload	9/7/2017	09/07/2017	3	3	100	15
276	Health Care Claim Status Request	005010X212	Upload	9/7/2017	09/07/2017	3	3	100	15
277	Health Care Claim Status Response	005010X212	Upload	9/7/2017	09/07/2017	3	3	100	15
837I	Health Care Claim: Institutional	005010X223A2	Upload	9/7/2017	09/07/2017	3	3	100	15
837P	Health Care Claim: Professional	005010X222A1	Upload	9/6/2017	09/06/2017	3	3	100	15

REVISION HISTORY

Version	Date	Author	Action/Summary of Changes
1.0	10/13/2017	Lisa Hlavinka	Removed this content from TPA User Guide to create a Registration and Maintenance Guide. Updated content.
1.1	10/13/2017	Hope McCain	Updates for clarity
1.2	10/31/2017	Hope McCain	Updates based on 10/26/2017 walkthrough with the State
1.3	10/31/2017	Rainy Natal	Additional updates based on testing
1.4	11/2/2017	Tara Humpherys, Jacquie Kennedy-King, Kim Duke	Additional updates
1.5	11/6/2017	Hope McCain	Additional updates based on State review
2.0	12/1/2017	TQD	DHW approved via UB01900B. Finalized and promoted to next whole version.
2.1	12/28/2017	Hope McCain	Updated "Change User Name" instructions
3.0	1/5/2018	TQD	DHW validated changes 1/5/2018.
3.1	2/8/2018	Tara Humpherys	Added Section 4.1 Ending Your TPA Session Correctly for TR 51377
4.0	2/14/2018	TQD	DHW validated changes 2/12/2018.
4.1	2/22/2018	Hope McCain	Added section 4.1 Multiple Sessions Warning
4.2	2/26/2018	Tara Humpherys	Minor updates to section 4.1
5.0	3/8/2018	TQD	DHW validated changes 3/5/2018.
5.0	10/5/2018	M Zampierin	Removed Molina references and replaced with DXC Technology
5.0	1/11/2019	M Zampierin	Updated Copyright statement to DXC
5.1	5/15/2019	Myranda Payne	Updated Demographic Information functionality to support TPA 4.17.0.0 release for 18018 Zip Code Validation.
6.0	6/18/2019	TQD	Validated per DHW 30 day notification agreement.
6.1	12/3/2019	Myranda Payne	Updated Figure 2 2: TPA Access by Type to include Document Exchange in the Secure Menu Items to support CCF 10855
6.2	12/11/2019	Myranda Payne	Clarified who has access to Document Exchange, TPA Access by Type to support CCF 10855
7.0	12/20/2019	TQD	Finalized per DHW validated changes 12/19/19.
7.1	1/29/2020	Myranda Payne	Updated Figure 5-4 User Roles to enhance Healthy Connection related roles, per DHW request.
8.0	2/19/2020	TQD	Finalized per DHW validated changes.
8.1	9/25/2020	Myranda Payne	Updated sections 5.4 Change User Name, 5.5.1 Resetting when Password is Known, 5.5.2 Resetting When Current Password is Unknown, and 5.6 Reset Locked TPA Account per TPA Release TPA 4.23.0.0/CR33184.
9.0	11/06/2020	TQD	Finalized per DHW validated changes.
9.1	6/14/2021	Myranda Payne	Semi-annual review. Rebranded throughout from DXC to Gainwell. Email approval granted by DHW.
10.0	07/08/2021	TQD	Finalized per rebranding approval granted.
10.1	12/3/2021	Myranda Payne	Semi-annual review. Updated email handles from DXC to Gainwell. No other changes necessary. Email approval granted by DHW.
11.0	01/25/2022	TQD	Finalized for publishing.
11.1	01/31/2022	Myranda Payne	Syntax errors updated throughout.
12.0	02/01/2022	TQD	Finalized for publishing.
12.0	06/09/2022	Myranda Payne	Semi-annual review. No updates necessary.
12.0	11/3/2022	Myranda Payne	Semi-annual review. No updates necessary.
12.1	01/09/2023	Myranda Payne	Updated section 5.1.2 Terminate User Access with specific criteria related to security for changing the administrator
12.2	01/09/2023	Myranda Payne	Informally approved. Approval granted to publish to provider portal prior to formal approval.

Version	Date	Author	Action/Summary of Changes
13.0	02/02/2023	TQD	Finalized per DHW validated changes.
13.0	05/25/2023	Myranda Payne	Semi-annual review; no changes necessary.
13.1	06/29/2023	Alex Boparai Joe Kopp Rhyan Lynch Myranda Payne	Semi-annual review; updates made to section 5.1.2. Terminate User Access with specific criteria related to security for changing the administrator.
14.0	08/16/2023	TQD	Finalized per DHW approved changes.
14.0	12/06/2023	Myranda Payne	Semi-annual review; no changes necessary.
14.1	12/07/2023	Myranda Payne	Updated for CCF 10902B1; added account termination and notification criteria
15.0	02/15/2024	TQD	Finalized per 30-day notice agreement.
15.1	06/11/2024	Myranda Payne	Semi-annual review; clarified access by type and user role details.
16.0	09/20/2024	TQD	Finalized per DHW notification agreement.
16.1	10/21/2024	Tessa Johnson	Semi-annul review; brought screenshots current throughout.
16.2	12/27/2024	Myranda Payne	Semi-annual review; formatting changes throughout. No other changes necessary
17.0	01/16/2025	TQD	Finalized per DHW validated changes.