

MI Health Plan Benefits

Domain Administrator Guide



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1 - MI Health Plan Benefits Overview

MI Health Plan Benefits is a web application built and hosted by Michigan Public Health Institute (MPHI) that allows registered Providers to query patients for Medicaid eligibility.

Providers can have accounts associated with it with the following roles:

- **User Account** This type of account allows the user to perform Individual and Multiple Eligibility lookups for the Provider.
- **Domain Administrator Account** This type of account allows the user to perform lookups in addition to managing the Provider's list of authorized users.



2 - How to Become a Domain Administrator

Potential users who intend to manage users for a Provider ID within MI Health Plan Benefits (HPB) must be set up as a Domain Administrator for that Provider ID.

There are two possible ways to become a Domain Administrator:

- 1. An existing Domain Administrator assists you
 - a. Have an existing Domain Administrator can add you to a Provider ID that they manage (section 2.1.1)
 - b. Have an existing Domain Administrator upgrade your existing account role from a user to a Domain Administrator (section 2.1.2)
- 2. Fill out an application to become a Domain Administrator. (section 2.2)

Domain Administrators will be responsible for adding all new users to the system. A normal user will not be allowed to create a new account.

*Domain Administrator accounts are for individual use and will not be shared for use by any other person(s) within or outside of the organization that the user is employed.

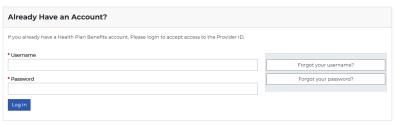
2.1 – Added by Domain Administrator

2.1.1 - Added by a Domain Administrator and you need to create an account

When a Domain Administrator has granted you access to a Provider ID, you will be sent an invite email. Follow the steps listed below to accept access to the Provider ID.

Step 1: Select the link in the email to be taken to the MI Health Plan Benefits page for accepting access to a Provider ID.

Step 2: If you already have a MI Health Plan Benefits account, log into the account by entering your username and password then selecting the "Log In" button in the "Already Have an Account?" section. Upon logging into your account, you will have access to the Provider ID.



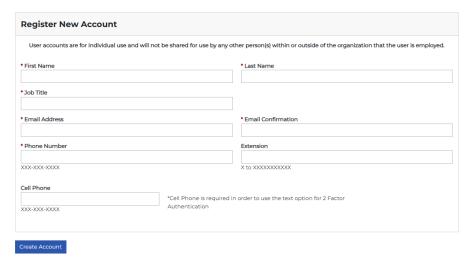
If you do not already have an account, go to step 3.

Step 3: Fill out the Register New Account section by entering the following information. A red asterisk (*) indicates a required field.

- * First Name Your first name.
- * Last Name Your last name.
- * Job Title Your job title.
- * Email Address Your email address. This address is where you will be sent emails necessary to finalize account setup.
- * Email Confirmation Re-enter your email address in this field to confirm that it was entered correctly.
- * Phone Number Your phone number.



• **Extension** – Your phone number extension, if necessary.



Step 4: Select the "Create Account" button at the bottom of the page to submit the account registration form. Upon submission, two emails will be sent to the entered email address: one with the new account username, and another with a registration link to set up the account password. The username is system generated.

Step 5: Two emails will be sent, you will need both emails to complete setting up your new account.

- One will contain your username.
- One will contain a link to set your password.

Select the link in the password email to be taken to the Setup Account page.

Step 6: On the Setup Account page, you must enter the username that was emailed to you, then enter and confirm your password.

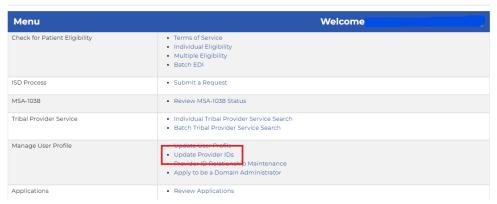
Step 7: Select the "Confirm" button to complete your account setup. You will be taken to the Login page to log in to your new account. Your new account will have access to the Provider ID granted by the Domain Administrator.

2.1.2 – Domain Administrator upgrades your role to your existing account

A Domain Administrator can upgrade a user to a Domain Administrator.

1. Select Update Provider IDs

Home





2. In the Approved Provider table, select View next to the Provider you want to upgrade the User to a Domain Administrator for.



3. In the Manage Users section select view next to the name of the User you want to upgrade.



4. Select Yes for "Is This User A Domain Administrator"? And then select Save.



The user will be able to view their upgraded role by selecting "Update Provider ID" on their menu screen. In the Approved Provider ID table, is a column titled "Role". There they will see Domain Administrator role and now they will be able to manage the Provider ID.

2.2 – Create an Account

You cannot create a new MI Health Plan Benefits account that is not linked to a Provider ID.

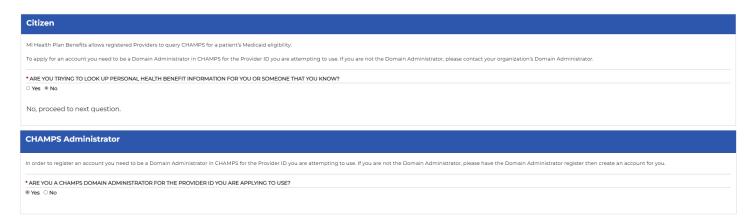
You must submit an application for access to the Provider ID. Once the application is approved, you will receive your new account credentials.

Step 1: Select the "Apply for an Account button" on the Login page.



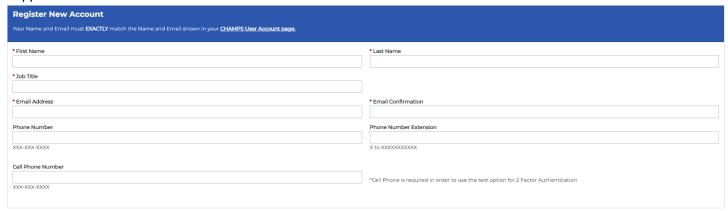
Step 2: Answer 2 questions:

- Verify that you are not trying to use the system as a citizen for personal use.
- Verify that you are a domain administrator for the Provider ID you are applying to use.



Step 3: Fill out the Register New Account and Organization Details sections of the application form.

*Applicant must be listed as a domain administrator for the Provider ID in CHAMPS







Step 4: Select the "Submit Application" button at the bottom of the page to submit the application form.

Your application to be the Domain Administrator of a Provider ID in MI Health Plan Benefits site will be reviewed within 10 days of your submission.

2.2.1 – Application Denial

If your application has been denied, you will be sent an email to inform you of the denial. This email will also contain the reason for the denial.

2.2.2 – Application Approval

If your application has been approved, you will be sent an email to inform you of the application's approval. This email may also contain attached instructions for how to associate MPHI as a billing agent in CHAMPS if necessary.

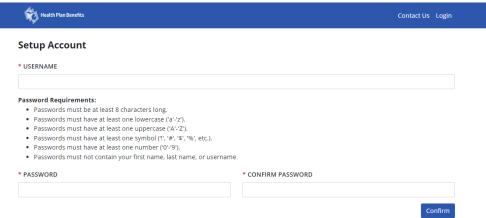
Two emails will be sent, you will need both emails to complete setting up your new account.

- One will contain your username.
- One second will contain a link to set your password.

Select the link in the password email to be taken to the Setup Account page.

Step 1: Select the link in the second email to be taken to the Setup Account page.

Step 2: On the Setup Account page, enter the username that was emailed to you, then enter your desired password in the Password and Confirm Password fields.



Step 3: Select the "Confirm" button to complete your account setup. You will be taken to the Terms of Service page where you must verify and sign the agreements (see section 3.7 of the User Guide).



3 - Accessing MI Health Plan Benefits

See section 3 of the User Guide for Login Instructions.

3.1 - User Maintenance System Policy

MI Health Plan Benefits accounts have 2 levels of permission: Account Login and User/Provider Relationship.

- 1. Account Login: You are required to log in at least once every 120 days or your account login will be deactivated.
 - If a user has not logged in for 180 days their account login will be expired.
- 2. User/Provider Relationship: <u>You are required to perform a search using an authorized Provider ID at least once</u> every 120 days or your User/Provider ID relationship will be deactivated.
 - A user with access to more than 1 Provider ID will need to perform a search with each Provider ID to keep the relationship active.
 - If a user has not performed a search using Provider ID for 180 days their Provider ID relationship will be expired.
 - For Domain Administrators, doing a blank search for Individual Eligibility will reset the 120 day deactivation timer for the Provider ID used in the blank search

Within 120 days you must login and complete a search to keep your account active.

A User/Provider ID relationship is defined as a user authorized to use a specific Provider ID to search eligibility. If a user is authorized to use to more than 1 Provider ID, each one is considered a unique relationship.

3.2 - Provider Maintenance System Policy

- 1. All Provider IDs in Health Plan Benefits must have an active Domain Administrator associated with it at all times.
 - a. Failure to do so within 48 hours, will result in all user accounts being deactivated until the Provider ID is compliant.
 - When a Domain Administrator is associated with the Provider ID and only 1 week remains until
 their relationship is deactivated, an email will be sent to everyone associated with the Provider
 ID.
 - ii. When there are no longer any Domain Administrators associated with the Provider ID an email is sent out to all users warning them the Provider ID will expire in 48 hours.
- 2. The Provider ID is fully accountable for all transactions submitted and will cooperate with MPHI or its agents in the event that there is a security concern with respect to the any queries submitted by the organization to MPHI.
- 3. Provider must promptly notify MPHI if account is no longer in compliance or needs deactivation.
- 4. Provider will promptly notify MPHI in the event that the identity or contact information of the Domain Administrator changes, or if any of the assurances are no longer met.

^{**}When a user leaves the organization, the domain administrator should immediately remove the user relationship.

If the user accesses patient information using the Provider ID, the Provider ID is liable for any HIPAA violations.



3.3 - Terms of Service Agreement

See section 3.8 of the User Guide for detailed information about the Health Plan Benefits Terms of Service Agreement.

3.4 - Login Flow

After a Domain Administrator logs in, the system will perform 2 checks.

- 1. Does the Domain Administrator have an active User/Provider ID relationship?
- 2. Has the Domain Administrator signed a Terms of Service agreement in the last 180 days?

If a Domain Administrator is authorized to use to more than 1 Provider ID, each one is considered a unique relationship.

If yes to both questions, the Domain Administrator can log into their account.

3.5 - Check User/Provider ID Relationships of Users

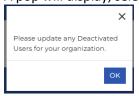
When the login flow is finished, the system will check to see if that Domain Administrator has any users with a deactivated Provider ID relationship.

Someone who has not done a search with the Provider ID in 120 days, has a deactivated relationship.

If any accounts with a deactivated relationship are found, you will be directed to the Update Provider ID page.

Domain Administrators are responsible for Confirming or Removing the User/Provider ID relationship for any users that have a deactivated relationship.

A pop will display, select OK to continue.

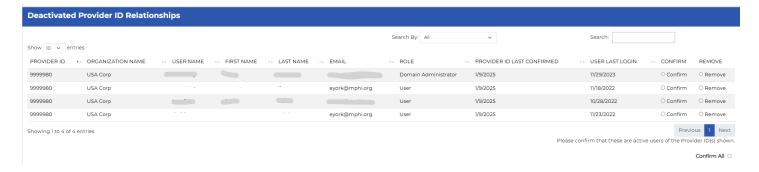


At the bottom of the page is the Deactivated Provider ID table, which will display every user you are responsible for that has a deactivated user/provider ID relationship.

The table contains the following fields:

- Confirm selection button to confirm the user
- Remove selection button to remove that user from the Provider
- Provider ID if you manage more than 1 Provider ID and a user has a relationship with each Provider ID, they will be displayed in more than one row.
- Organization Name
- User Name
- First Name
- Last Name
- Email
- Role
- Provider ID Last Confirmed date the user last used the Provider ID to search eligibility
- User Last Login date that user last logged in





If a user has multiple relationships, you will see multiple rows in the table, one row for each relationship.

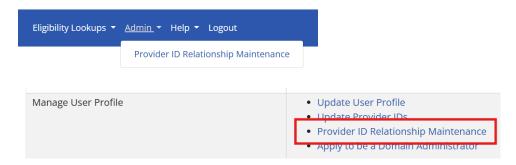
Domain Administrators have the option to confirm or remove the user relationships(s) shown in the table. No action needs to be taken, but every visit to the page will display the popup until all deactivated relationships to the Provider ID(s) have been resolved.

Users with deactivated relationships will appear in this table for 60 days. The system will remove users with deactivated relationships from this table and the Provider ID after 180 days since they last confirmed their User/Provider ID Relationship.

3.6 - Provider ID Relationship Maintenance

As stated above a relationship is maintained by doing a search using the Provider ID. A DA has an alternative way to maintain that relationship by Confirming the relationship.

On the home page, select Provider ID Relationship Management from either the Admin dropdown in the Navigation Bar or in the Manage User Profile section.



Clicking on the link will take the DA to the Provider ID Relationship Management page.

A table with all the Provider IDs the DA has an Active or Deactivated relationship with. It will show the following columns:

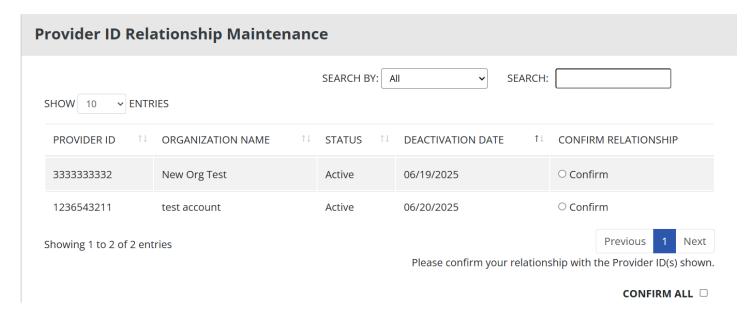
- Provider ID
- Organization Name
- Status
- Deactivation Date



Confirm Relationship

The deactivation date is 120 days from the last time a search was done, or the relationship was confirmed.

To confirm a relationship, click the Confirm radio button. A Confirm button will appear below the table, click it and the deactivation date will be updated.





4 – Updating Account ProfileSee section 6 of the User Guide for instruction on updating your account profile.



5 - Provider ID Management

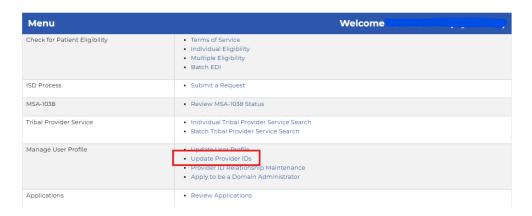
Provider IDs must have an active domain administrator associated with it at all times.

Domain Administrators can view and manage the details for the Provider ID and manage user relationships to the Provider ID.

MI Health Plan Benefits accounts have 2 levels of permission: Account Login and User/Provider Relationship.

- Domain Administrators manage the second level: User/Provider Relationships.
- If a user has issues with their Account Login, they will need to contact Health Plan Benefits Support.

To access the Provider ID Management page, select "Update Provider IDs" in the User Profile section of the Home Page.



5.1 - Provider ID Management Page

The Update Provider ID page contains 3 tables: Provider IDs Pending Review, Approved Provider IDs and User with Deactivated Relationships to the Provider IDs.

Pending Provider ID Applications table

The Pending Provider ID Applications table shows all the Provider IDs that you have applied to become the HPB Domain Administrator for where the application is still pending review.

The following fields are shown in the table:

- **Provider ID** The Provider ID the application is for.
- Type The type of Provider ID the application is for; either NPI or CHAMPS.
- **Organization Name** The name of the organization the application is for.
- Role Your role for the listed Provider ID.
- Actions An application to become a HPB Domain Administrator for a Provider ID may be canceled by selecting the Cancel link in the Actions column.





You can also apply to become a Domain Administrator for a different Provider ID, select "Apply to be a Domain Administrator" button.

Approved Provider IDs table

The Approved Provider IDs table shows all the Provider IDs that you have approved access to as either a Domain Administrator or a User.

The following fields are shown in the table:

- Provider ID The Provider ID.
- **Type** The type of Provider ID; either NPI or CHAMPS.
- Organization Name The name of the organization.
- Role Your role for the listed Provider ID (either Domain Administrator or User).
- Expiration Date The date this Provider ID is scheduled to expire if not confirmed
- Actions Selecting the View link will take you to the Provider ID Management page for that Provider ID.



The Provider ID Management page is broken into 4 sections: Provider ID Details, Domain Administrators, Pending Users, and Manage Users.

Provider ID Details



The Provider ID Details section shows high level details about the Provider ID, including the fields listed below.

- National Provider ID or CHAMPS ID The selected Provider ID.
- **Provider ID Type** The selected Provider ID's type, either NPI or CHAMPS ID.
- Status The current status of the selected Provider ID.
- Organization Name The name of the organization for the selected Provider ID.
- Organization Type The organization's type for the selected Provider ID.
- Your Role The current user's role with the selected Provider ID; either Domain Administrator or User.



Federal Tax ID – The Federal Tax ID of the organization for the selected Provider ID.

Domain Administrators



The Domain Administrators section lists out the details of all the selected Provider ID's Domain Administrators. For each Domain Administrator, the following information is shown:

- Name The listed Domain Administrator's full name.
- **Email** The listed Domain Administrator's email address.
- Phone Number The listed Domain Administrator's phone number.
- Extension The listed Domain Administrator's phone number extension.

Pending Users Section

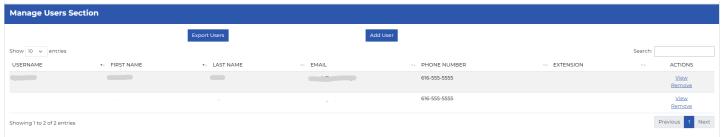


The Pending Users section lists the users who have been added to the Provider ID but have not yet linked the permissions with their account. The following information is shown for each of the pending users:

- First Name The first name of the listed pending user.
- Last Name The last name of the listed pending user.
- Email The email address of the listed pending user.
- Invite Status The status of an invitation Active, Expired
- Actions Selecting the Remove action for a pending user will cancel the addition of the pending user to the selected Provider ID. The pending user will receive an email to inform them of the cancelation.

*Pending User invite links expire after 24 hours. The Domain Administrator will need to resend the invite for the new user to receive a new link.

Manage Users Section





The Manage Users section lists the users who have access to the selected Provider ID. For each user, the following information is shown:

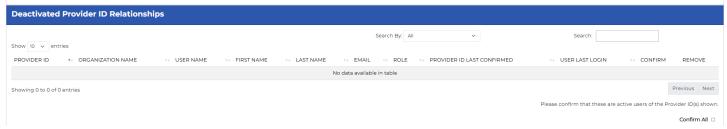
- Username The listed user's MI Health Plan Benefits account username.
- First Name The listed user's first name.
- Last Name The listed user's last name.
- **Email** The listed user's email address.
- **Phone Number** The listed user's phone number.
- **Extension** The listed user's phone number extension.
- Actions When the View action is selected, the Domain Administrator will be taken to the Update User page for
 the selected user (see 6.1 Adding a New User/Editing an Existing User). When the Remove action is selected,
 the Domain Administrator will be prompted to confirm their decision to remove the selected user's access to the
 selected Provider ID.

Deactivated Provider ID Relationships Section

The Deactivated Provider ID Relationships table will display every user you are in charge of that has a deactivated user/provider ID relationship.

The table contains the following fields:

- Confirm selection button to confirm the user
- Remove selection button to remove that user from the Provider
- Provider ID
- Organization Name
- User Name
- First Name
- Last Name
- Email
- Role
- Provider ID Last Confirmed date the user last used the Provider ID to search eligibility
- User Last Login date the user last logged in



If a user has multiple relationships, you will see multiple rows in the table, one row for each relationship.

You have the option to confirm or remove the user(s) shown, no action needs to be taken, but every visit to the page will display the popup until all deactivated Provider IDs have been resolved.

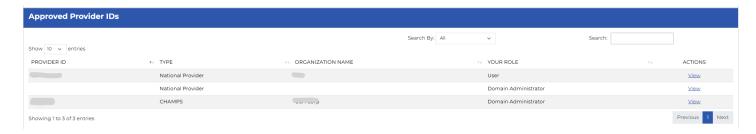
5.2 - Editing a Provider ID

Domain Administrators can make changes to their Provider ID's details by submitting an edit application.

Step 1: Select the "**Update Provider IDs**" link on the Home page to be taken to your Update Provider IDs page.



Step 2: Scroll to the "Approved Provider IDs" section. Find the Provider ID that you would like to add the user to and select **View** to navigate to the Provider ID Management page.



Step 3: In the Provider ID Details select "Update Organization Information".



Step 4: Provide new Organization Name or Type

The Provider ID number and Tax ID fields are read-only. If those fields need to be changed, a new application is needed.

Note: The new Provider ID details must match the information in CHAMPS for the Provider ID.



The edited organization details must be submitted for approval. Once the edit is approved, the Provider ID's details will be updated with the information that was entered on the application.



6 - Managing Users

6.1 – Adding a New User

As a Domain Administrator, you can add new user relationships to a Provider ID from the Provider ID Management page. To add a new user, follow the steps listed below.

Step 1: Select the "Update Provider IDs" link on the Home page to be taken to your Update Provider IDs page.

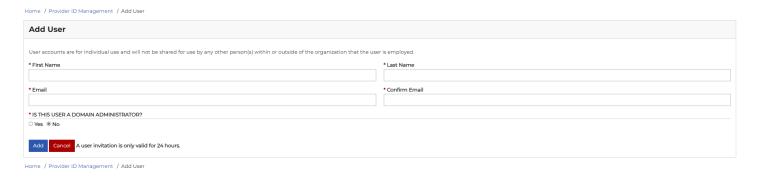
Step 2: Scroll to the "**Approved Provider IDs**" section. Find the Provider ID that you would like to add the user to and select **View** to navigate to the Provider ID Management page.

Step 3: Scroll to the Manage Users Section and select "Add User".



Step 4: Fill in the following. A red asterisk (*) indicates a required field:

- * First Name The new user's first name.
- * Last Name The new user's last name.
- * Email The new user's email address. Account setup emails will be sent to this address.
- * Confirm Email Field to confirm the new user's email address.
- * Is this user a Domain Administrator? Indicates whether this new user will have Domain Administrator rights to the Provider ID in MI Health Plan Benefits.

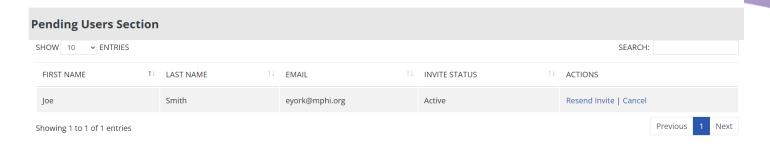


Step 5: Select the "Add" button to create the new user account. A User has 24 hours to use the invite, after that it becomes invalid.

Once the account has been successfully created, emails will be sent to the new user's email address with instructions for gaining access to the Provider ID.

The user will appear in the Pending Users Section table.



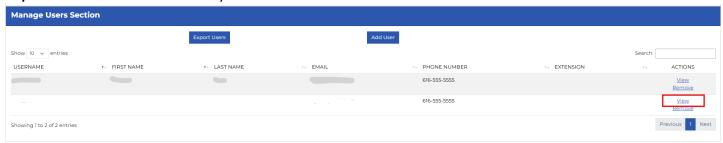


6.2 - Editing an Existing User

Step 1: Select the "Update Provider IDs" link on the Home page to be taken to your Update Provider IDs page.

Step 2: Scroll to the "Approved Provider IDs" section. Find the Provider ID that you would like to edit the user from and select **View** to navigate to the Provider ID Management page.

Step 3: Select View next to the user you would like to edit.



Step 4: When editing an existing user, the only information a Domain Administrator can edit from the Update User screen is the indicator identifying a user as a Domain Administrator.

All other fields will be read-only - that user can update their own profile details.

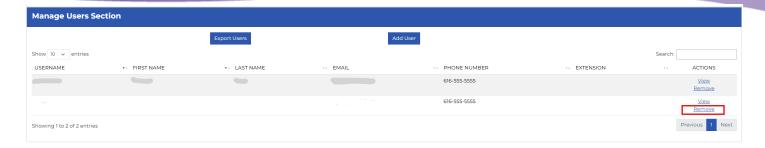
Select **Save** to save your changes.

6.3 – Removing a User

**When a user leaves the organization, the domain administrator should immediately remove the user relationship. If the user accesses patient information using the Provider ID, the Provider ID is liable for any HIPAA violations.

- Step 1: Select the "Update Provider IDs" link on the Home page to be taken to your User Profile page.
- **Step 2:** Scroll to the "Approved Provider IDs" section. Find the Provider ID that you would like to edit the user from and select **View** to navigate to the Provider ID Management page.
- **Step 3:** From the "Manage Users" section, select **Remove** next to the user you would like to Remove. If you would like to remove the user from multiple Provider Ids see 6.3.1





Step 4: You will see a confirmation Prompt. Select **Yes** to continue with removal. Select **No** to return.



6.3.1 – Remove a User from Multiple Provider IDs

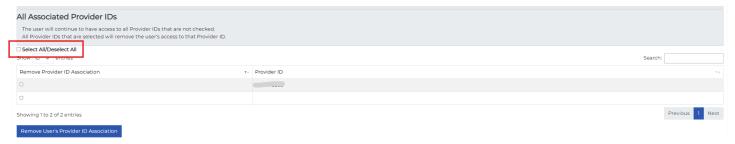
Step 1: Select the "Update Provider IDs" link on the Home page to be taken to your User Profile page.

Step 2: Scroll to the "Approved Provider IDs" section. Find the Provider ID that you would like to edit the user from and select **View** to navigate to the Provider ID Management page.

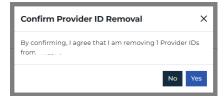
Step 3: From the "Manage Users" section, select **View** next to the user you would like to Remove from multiple Provider IDs.

Step 4: In the ALL Associated Provider IDs section select all the providers you want to remove the user from. You can also check the Select/Deselect All box to select all of the providers.

Select the Remove User's Provider ID Association button.



Step 5: A popup will appear confirming removal, select Yes.



Step 6: You will be taken to the main page and a message will appear at the top.



User updated successfully!

6.4 - Export Users

To create an excel export of all the users for a provider id, follow the steps listed below.

Step 1: Select the "Update Provider IDs" link on the Home page to be taken to your Update Provider IDs page.

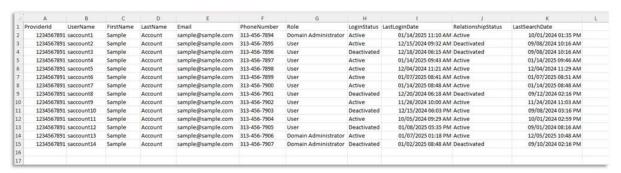
Step 2: Scroll to the "**Approved Provider IDs**" section. Find the Provider ID that you would like to export users for and select **View** to navigate to the Provider ID Management page.

Step 3: Scroll to the Manage Users Section and select "Export Users".



An export with the following fields will download:

- Provider ID
- UserName
- First Name
- Last Name
- Email
- Phone Number
- Role
- Login Status
- Last Login Date
- Relationship Status
- Last Search Date



- Active Login: Indicates that the person has logged into their account within the last 120 days
- Active Relationship: Indicates that the person has completed a search within the last 120 days
- Deactivated Login: Indicates that the person logged into their account over 121 days ago
- Deactivated Relationship: Indicates that the person completed a search over 121 days ago



7 - Applying for an X12 Account (270/271)

Only a Domain Administrator can apply for an X12 account.

An X12 account allows the Provider ID directly to a server to submit 270 transaction and receive a reply.

| X12 Application | • Apply for X12 (270/271) |
|-----------------|---------------------------|
| | |

8 - Review MSA-1038 Status

See Section 7 of the User Guide for instructions on how to Review MSA-1038 Status

9 - Tribal Provider Lookup

See Section 8 of the User Guide for instructions on how to use the Tribal Provider Lookup

10 - Individual Eligibility Lookup

See Section 9 of the User Guide for instructions on how to use the Individual Eligibility Lookup

11 - Multiple Eligibility Lookup

See Section 10 of the User Guide for instructions on how to use the Multiple Eligibility Lookup

12 - Batch EDI Processor

See Section 11 of the User Guide for instructions on how to use the Batch EDI Processor

13 - ISD Batch Processor

See Section 12 of the User Guide for instructions on how to use the ISD Batch Processor