
Oregon Health Plan Provider Web Portal

Clerk Set Up and Maintenance



September 2015

<https://www.or-medicaid.gov>

Account menu,
Click Secure Site

The screenshot shows the top navigation bar of the Oregon Medicaid website. The 'Account' menu is open, showing options: Account Setup, Logoff, Reset Password, and Secure Site. Below the navigation bar is a blue banner with the following text:

Warning: Use of this network is restricted to authorized users only and must comply with Oregon Health Authority privacy and security policies. User activity may be monitored and/or recorded. Anyone using this network expressly consents to such monitoring and/or recording. BE ADVISED: if possible criminal activity is detected, these records, along with certain personal information, may be provided to law enforcement officials.

Security incidents should be directed to the Security Incident Response Team at (503) 945-6812.

All other issues, including Password Resets, should be directed to Provider Services at (800) 336-6016.

Welcome to the Medicaid Portal web site!

- Providers - Login to set up your Web portal accounts and verify eligibility for OHP clients
- Providers - What you need to know about the Web portal
- OHP provider announcements
- AMH Providers - View the Addictions and Mental Health home page
- APD Providers - View the Aging and people with physical disabilities home page
- Oregon Medicaid NPI Verification - Search an NPI for active providers with Oregon Medicaid

Links to Oregon
Health Plan
information



Login

1. Type User Name and Password
2. Click login

Home Contact Us Directory Search Clients **Account** Providers
home account setup logoff reset password **secure site**

Login

The State Health Care Authority's secure website is intended for providers, clerks and billing agents.

If you have received your Personal Identification Number letter, click on the setup account button.

[setup account](#)

If you're already a member and have set up your account or a provider has set one up for you, login here to enter our secure website.

User Name* GREATEXPECTATIONS 1
Password* ●●●●●●●● 2
[login](#)

If you have forgotten your password please click the reset password button.

[reset password](#)

Clerk Setup Steps

1. Make sure you are logged in under the correct provider ID (If applicable: Account menu, switch provider)
2. Account menu, clerk maintenance
3. Add clerk
 1. Set up an account for someone or
 2. Give access to someone who already has a Provider Web Portal account
4. Assign clerk roles
5. Click submit

Providers Page

Account menu

Home Contact Us Directory Search Clients Account Claims Eligibility Trade Files Prior Authorization **Providers** POC Help
home demographic maintenance drug Account Maintenance Payment tracking search links benefits and hsc inquiry ehr incentive
client pmpm history client pmpm attest Change Password
Clerk Maintenance
Logoff
Messages
Switch Provider

Information ? ^

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This site is designed to be compatible with following browsers:

- Microsoft Internet Explorer 6
- Microsoft Internet Explorer 7 Service Pack 2
- Microsoft Internet Explorer 8 and 9 (using compatibility mode)
- Mozilla FireFox 2.0



Remember to switch provider if needed. Account menu, click Switch Provider

What's New

Provider ID:506662627 MCD
Taxonomy:3104A0630X
Zip Code: 97307 -

Upon initial login, the portal displays the Medicaid provider ID that is currently logged in. Some logins have access to multiple provider IDs



Switch Provider, if needed

1 Switch Provider

National Provider ID	Medicaid Provider ID	Address	City	State	Zip	Zip + 4	Taxonomy	Provider Type	Default Provider
1891792313	506662624	124 MONITOR STREET	SALEM	OR	97301	2	207V00000X	Physician	<input type="checkbox"/>
1811287295	506662627	78 BLACK HAWK WAY	JEFFERSON	OR	97307		3104A0630X	MH Provider	<input checked="" type="checkbox"/>

Select row above to update.

Current Provider 506662627

National Provider ID

Address

City

State

Zip

Medicaid Provider ID

Taxonomy

Provider Type

Default Provider ID

3 switch to set as default

1. Account menu, click Switch Provider (see slide 13)

2. Click the row for the provider you want to switch to

3. Click switch to

If you set a clerk up under the default ID, the clerk does not carry over to the other IDs. Clerks accounts must be set up and assigned under each ID separately.

Indicates the default provider ID; the portal automatically logs you in under this ID

Change your default provider by clicking the row for the provider you want (step 2 above) then click set as default

Clerk Setup

1 Clerk Maintenance

User Name Contact First Name Contact Last Name

A

Type data below for new record.

User Name* JOHNNIE5 [Search]

Contact First Name* JOHNNIE **3**

Contact Last Name* FIVE

Phone Number* (800)555-5555

EMail* JOHNNIE@5.COM

Confirm EMail* JOHNNIE@5.COM

Password* ●●●●●●

Confirm Password* ●●●●●●

The password assigned by the administrator is temporary

Assigned Roles **4** **Available Roles**

Clerk Roles

Benefits HSC Inquiry	<	Drug Search
Claim Inquiry	<<	Plan of Care Inquiry
Claim Submission	>	Claim Void
Eligibility Inquiry	>>	Clerk Maintenance
Prior Auth Inquiry		EHR Incentive
Prior Auth Submit		PCPCH

remove clerk add clerk **2**

5 submit cancel

Password requirements:

1. At least eight characters
2. One upper-case letter
3. One lower-case letter
4. One number or special character

1. Account menu, click Clerk Maintenance (see slide 13)
2. Click add clerk
3. Enter clerk information
4. Use arrows to assign roles from the Available Roles section
5. Click submit

Add an Existing Clerk

1 Clerk Maintenance

User Name Contact First Name Contact Last Name

A

User Name* [Search] **3**

Contact First Name*

Contact Last Name*

User Name

Search

User Name JENJEN10

First Name **4**

Last Name

Search Results

User Name	First Name	Last Name
JENJEN10	JENNIFER	SMITH

6

Assigned Roles

Clerk Roles

< << >> >

Bene
Dem
Trad
Prior
Prior
Claim

1. Account menu, click Clerk Maintenance (see slide 13)
2. Click add clerk
3. Click Search hyperlink
4. Enter search criteria
5. Click search
6. Click on the appropriate row in the Search Results

[?] [^]

[Close]

[?] [^]

5

search clear

2

remove clerk add clerk

submit cancel

Auto-Populated Clerk

1. Assign roles from the Available Roles section
2. Click submit

Clerk Maintenance

User Name Contact First Name Contact Last Name

A

User Name JENJEN10 [Search]

Contact First Name JENNIFER

Contact Last Name SMITH

Phone Number (503)602-1128

E-Mail JENNIFER.R.SMITH@STATE.OR.US

Clerk Roles

Assigned Roles 1

- Eligibility Inquiry
- PCPCH
- Plan of Care Inquiry
- Prior Auth Inquiry
- Prior Auth Submit
- Trade Files

Available Roles

remove clerk add clerk

2 submit cancel

Update a Clerk

The screenshot shows the 'Clerk Maintenance' web application. At the top, a table lists clerks with columns for User Name, Contact First Name, and Contact Last Name. Below this is a form for editing a clerk's details, including fields for User Name, Contact First Name, Contact Last Name, Phone Number, and Email. A 'Clerk Roles' section contains two boxes: 'Assigned Roles' and 'Available'. The 'Assigned Roles' box lists: Claim Inquiry, Eligibility Inquiry, Prior Auth Inquiry, Benefits HSC Inquiry, and Plan of Care Inquiry. The 'Available' box lists: Demographic Maint, Trade Files, Prior Auth Submit, Claim Submission, Drug Search, and Claim Void. Between these boxes are four arrow buttons: a left arrow, two left arrows, a right arrow, and two right arrows. At the bottom right, there are buttons for 'remove clerk', 'add clerk', 'submit', and 'cancel'. A yellow callout box on the right contains the following instructions:

1. Account menu, click Clerk Maintenance (see slide 13)
2. Click a row to select a clerk
3. Select roles, and use arrows to assign or remove roles
4. Click Submit

Delete a Clerk

1 Clerk Maintenance

User Name	Contact First Name	Contact Last Name
WALLE08	EVA	STANTON
JOHNNIES	JOHNNIE	FIVE

Type changes below.

User Name WALLE08 [Search]

Contact First Name EVA

Contact Last Name STANTON

Phone Number (503)555-9255

Email WALLE@PIXAR.COM

Assigned Roles

Clerk Roles

- Claim Inquiry
- Eligibility Inquiry
- Prior Auth Inquiry
- Benefits HSC Inquiry
- Plan of Care Inquiry

- Demographic
- Trade Files
- Prior Auth Submit
- Claim Submission
- Drug Search
- Claim Void

3 remove clerk add clerk

4 submit cancel

1. Account menu, click Clerk Maintenance (see slide 13)
2. Click a row to select a clerk
3. Click remove clerk
4. Click Submit

Do You Need Further Assistance?

Provider Services Unit (PSU)

800-336-6016

dmap.providerservices@state.or.us

Medicaid Provider Training

Medicaid.Provider-Training@state.or.us