ONB✦ARD

Registration, access and administration for health care providers

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I. Overview

Users need access to the Medical Portal to use OnBoard: Limited Release to submit and respond to a prior authorization request (PAR) or *Request for Decision on Unpaid Medical Bill(s) (Form HP-1.0)*. Some users may already have access and will not need to request access again. The information in this guide details who needs access, how to request (or register) for access, and how to designate and manage user roles inthe system.

II. Medical Portal access: who has it, and who needs it?

| User Type	Details
Health care providers **with** Medical Portal access	Providers who already have access to the Medical Portal are automatically registered for OnBoard.
Health care providers **without** Medical Portal access	If you are an acupuncturist, chiropractor, licensed clinical social worker, physician, physician assistant, nurse practitioner, podiatrist, psychologist, physical therapist, occupational therapist, dentist, audiologist, or optometrist, you will follow the **health care provider registration** instructions.
Medical suppliers	If you are not an acupuncturist, chiropractor, licensed clinical social worker, physician, physician assistant, nurse practitioner, podiatrist, psychologist, physical therapist, occupational therapist, dentist, audiologist, or optometrist, you will follow

	the **medical supplier registration** instructions.

III. Role types

Health Care Provider Roles	Responsibilities
Provider *Treating physician, nurse practitioner, chiropractor, etc.*	• Assigns provider delegate and billing delegate users who can draft PARs and draft/submit *Form HP-1.0* on the provider's behalf. • Required to submit PARs in OnBoard: Limited Release.
Provider Delegate *Medical Portal users are assigned by the provider as a Provider Delegate.*	• Drafts PARs, which must be reviewed and submitted by the health care provider. • Drafts PAR escalations for provider review and submission. • Responds to insurer requests for information (must be designated by the health care provider from within OnBoard: Limited Release). • Drafts and submits *Form HP-1.0.*
Billing Delegate *Medical Portal users are assigned by the provider as a Billing Delegate.*	• Drafts and submits *Form HP-1.0* only. • If the provider uses a billing agent to submit their medical bills, the provider will need to set up user accounts for any employee of the billing agent who will be allowed to submit *Form HP-1.0* on behalf of the provider.

IV. Requesting access to the Medical Portal for health care providers

1. Visit wcb.ny.gov/medicalportal.
2. Select Access and Administration under Health Care Providers.
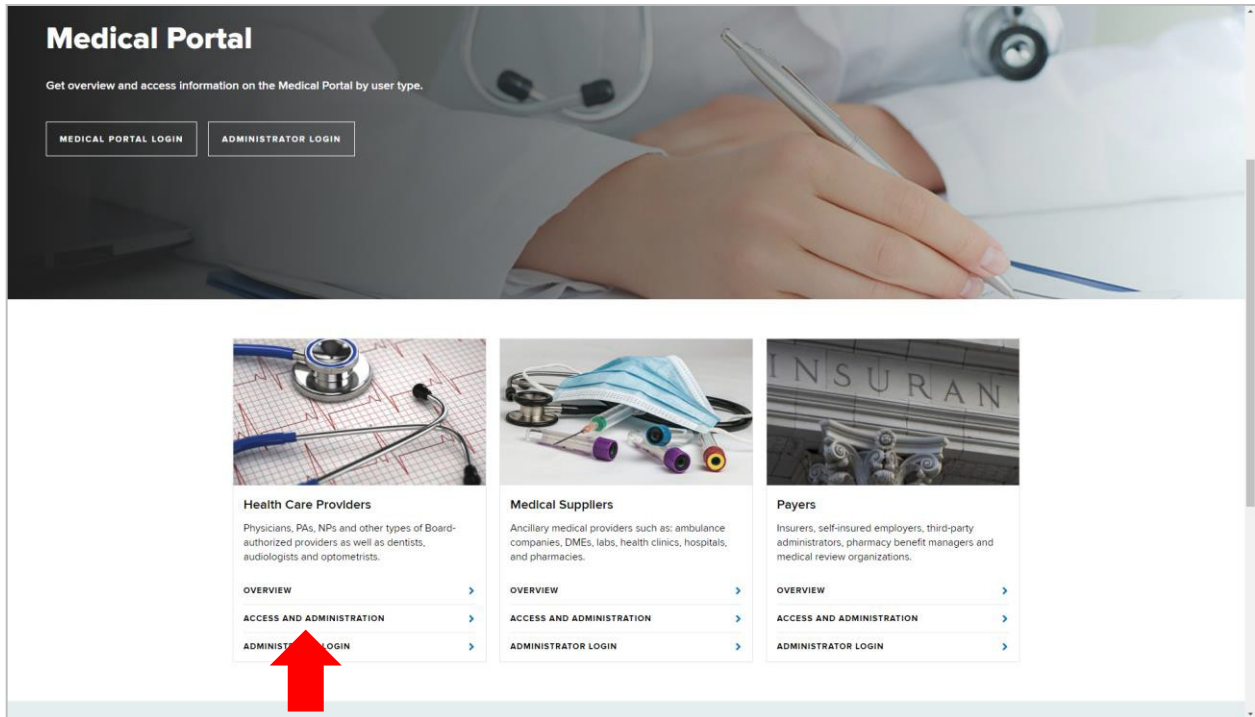
3. Select <u>Requirements</u> in the left column. Then select <u>Sign Up for Access to the Medical Portal</u>.
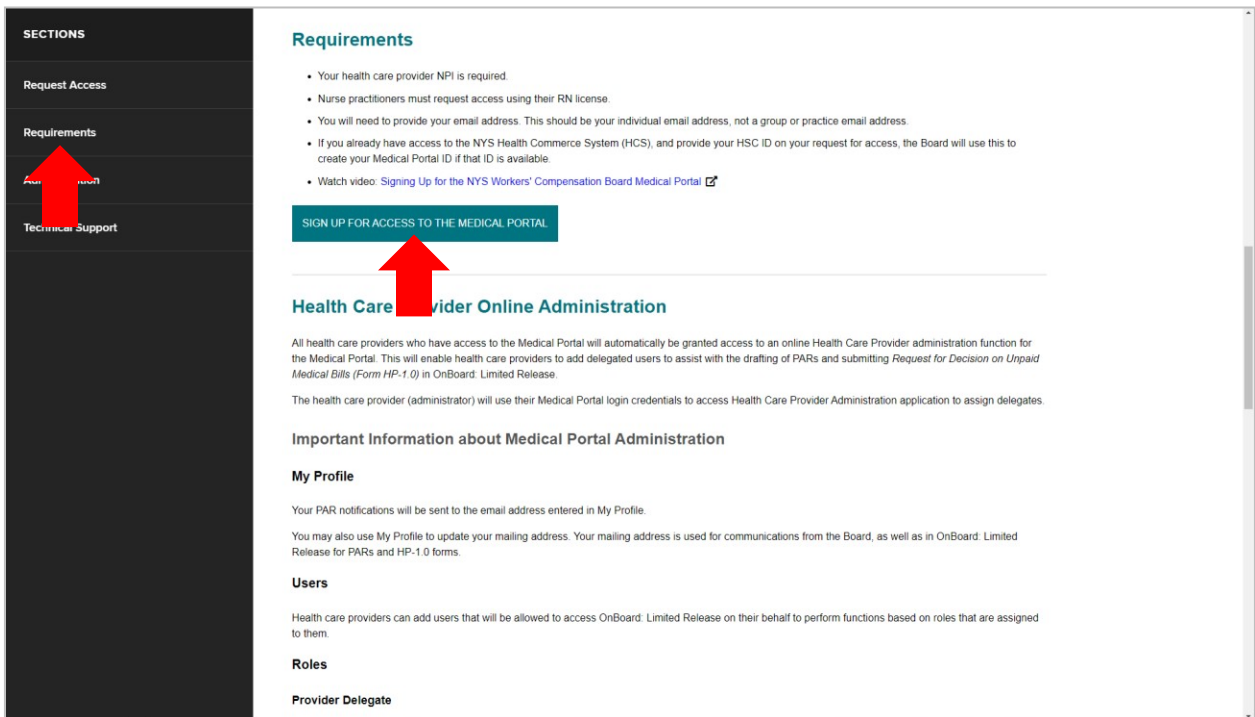
4. Review the information on this page. Then select **Continue**.

5. In the Authorization Status tab, select the registering provider type and authorization status. Select **Next**.

6. In the Provider Information tab, enter the provider information and select **Submit**.

7. After selecting **Submit**, the Registration Complete webpage will show.

It may take up to three to five business days for the Board to complete the review of your registration. Once approved, a message will be sent to the email address you provided in the registration with your NY.gov ID username and temporary password.

V. Managing your profile and Medical Portal delegates for health care providers

Health care providers can manage their delegated Medical Portal users for OnBoard: Limited Release. They will log in using their Medical Portal NY.gov ID username and password. The NY.gov ID used to access the Medical Portal is separate and apart from the NY.gov ID that may be used for other NYS agencies, such as the Department of Motor Vehicles and Taxation and Finance.
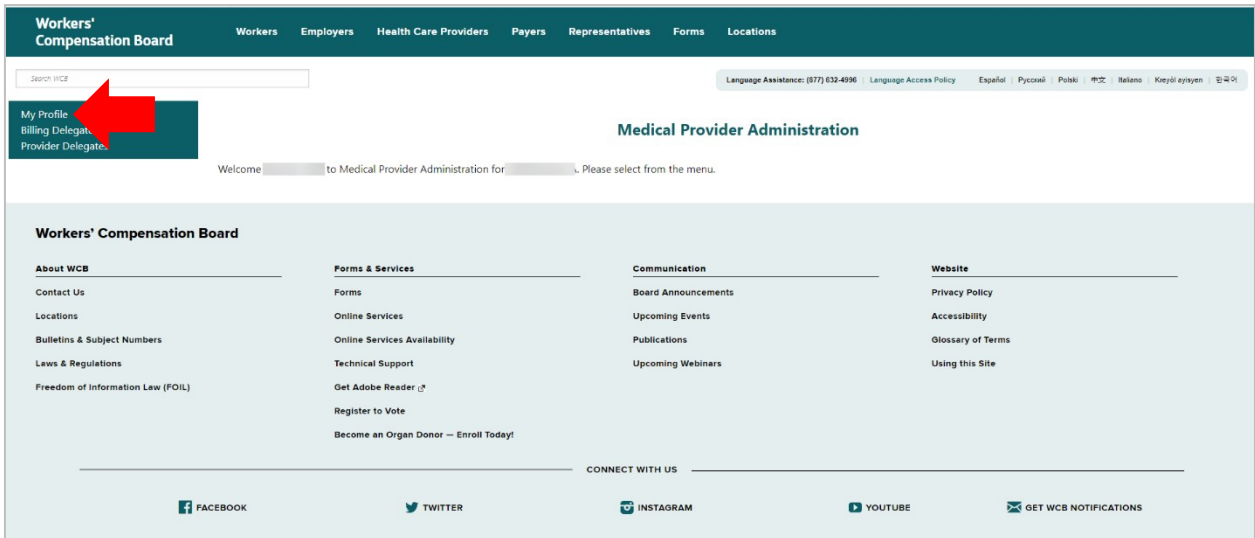
1. Visit wcb.ny.gov/medicalportal.
2. Select Administrator Login.
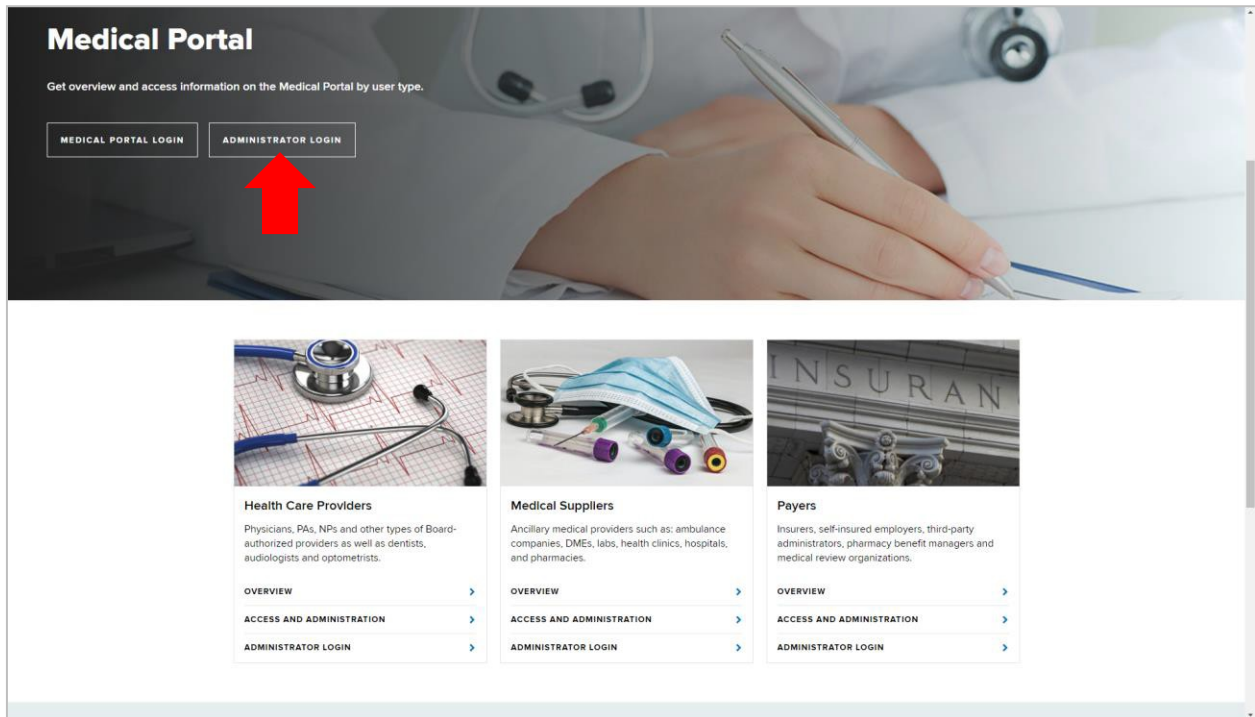
3. Enter your Medical Portal NY.gov ID username and password.
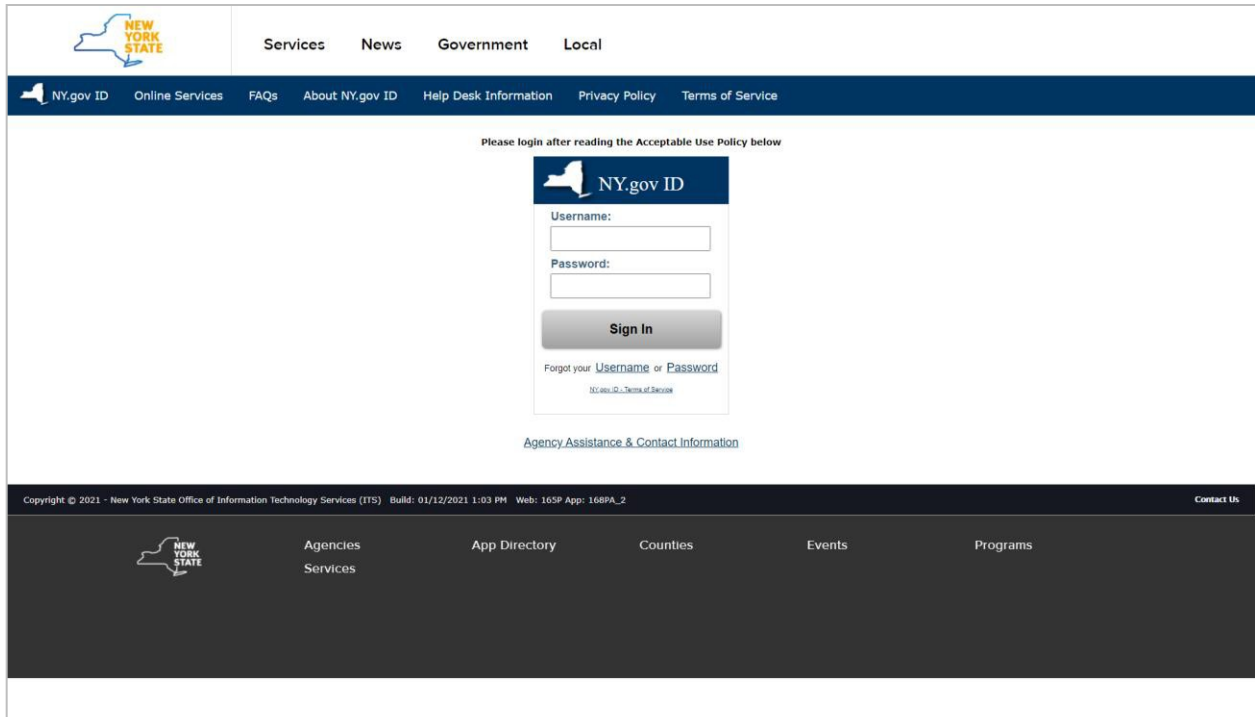
4. The Medical Provider Administration page will allow you to manage your profile and users in the system. The first option in the menu is **My Profile**. Select **My Profile** to edit profile information.

5. Confirm the information is accurate. The mailing address in your profile will be used for communications from the Board and for PARs. If you need to edit the information, select **Modify My Data** on the bottom left.

6. Update the information as needed and select **Continue.**

7. Select **Billing Delegates** to remove, modify, or add new billing delegates.
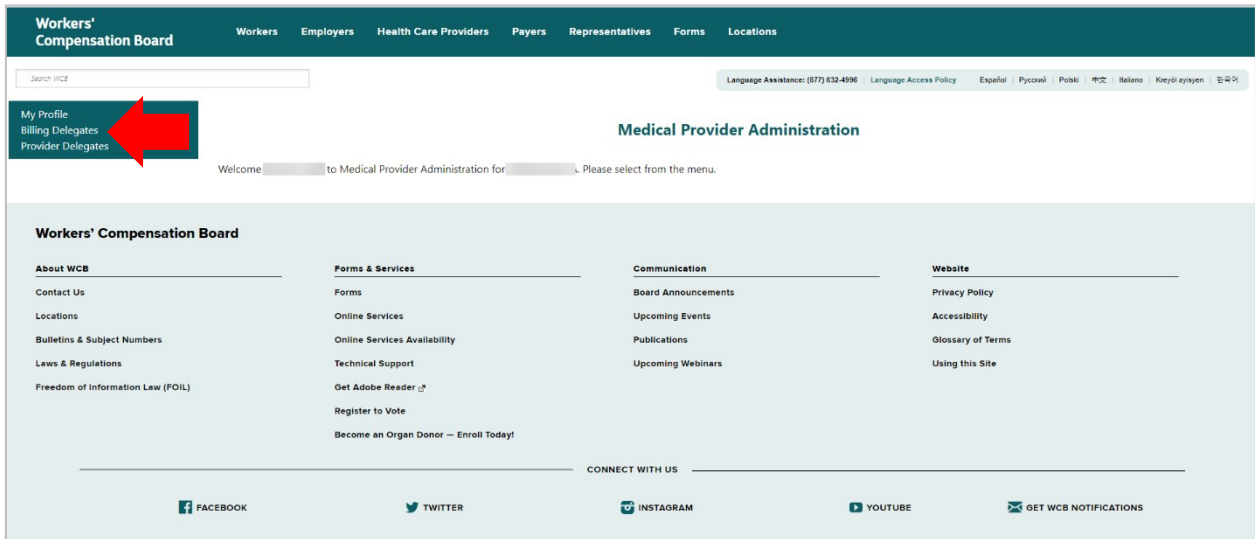
8. The Billing Delegates page will show two boxes. The first box lists users who are currently a Billing Delegate and can submit *Form HP-1.0* on your behalf. Be sure to keep this list updated and remove users who should no longer submit bills on your behalf. To remove a user as an active Billing Delegate, select the **Remove** button in that user's row. The user's information will move from the first box to the second box. Use the **Modify** button to update information for a delegated user as needed.
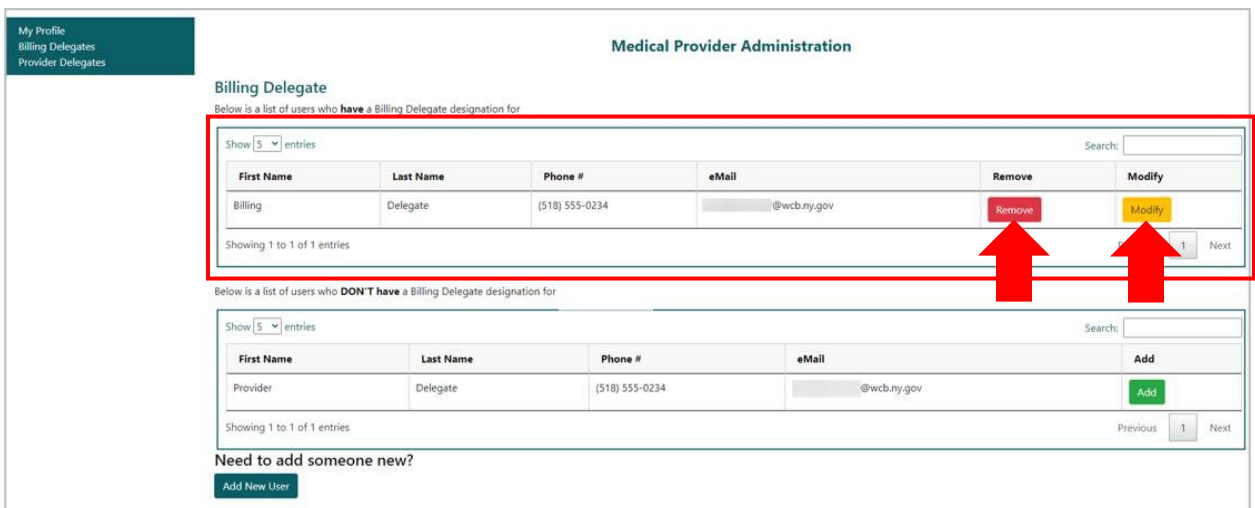
9. The second box shows a list of users who are not currently designated as a Billing Delegate but are registered in the system as a user for the health care provider. To designate one of these users as an active Billing Delegate, select the **Add** button in that user's row.

10. If a new user is not listed in the second box, they will need to be registered as a Billing Delegate. Select **Add New User**.

11. Enter the new user's information. Once submitted, the add user requestis sent to the Board for processing. Once processed, the user will receive a NY.gov ID username and temporary password via the email address submitted on the registration. Select **Continue**.

12. The last option in the main menu is **Provider Delegates**. Provider Delegates will be able to draft PARs, but the health care providers themselves are required to submit them. Provider delegates can also draft and submit *Form HP-1.0* and do not have to separately be listed as a Billing Delegate.

13. The Provider Delegates page will show two boxes. The first box lists users who are currently Provider Delegates and can draft PARs and *Form HP-1.0*. Be sure to keep this updated and remove users who should no longer draft or submit on your behalf. To remove a user as an active Provider Delegate, select the **Remove** button in that user's row. The user's information will move from the first box to the second box. Use the **Modify** button to update information for a delegated user as needed.

14. The second box shows a list of users who are not currently designated as a Provider Delegate but are registered in the system as a user for the health care provider. To designate one of these users as an active Provider Delegate, select the **Add** button in that user's row.

15. If a new user is not listed in the second box, they will need to be registered as a Provider Delegate. Select **Add New User**.

16. Enter the new user's information. Once submitted, the add user request is sent to the Board for processing. Once processed, the user will receive a NY.gov ID temporary password via the email address submitted on the registration. Select **Continue**.

VIII. Need help?

Medical Portal access for providers: wcb.ny.gov/medicalportal
General registration questions: Customer Service (877) 632-4996
Technical assistance: WCBCustomerSupport@wcb.ny.gov
OnBoard webpage: wcb.ny.gov/onboard
Email OnBoard: OnBoard@wcb.ny.gov