A Better System for a Better Board

OnBoard: Limited Release for Health Care Providers
Agenda

1. OnBoard: Limited Release Recap
2. Who can do what in Onboard: Limited Release?
3. Registration and Administration
4. New FAQs and What’s Next
5. Question and Answer Session
OnBoard Timeline

- Began in summer 2019
- Identified opportunities to release system functionality early, to better assist stakeholders
  - OnBoard: Limited Release
- OnBoard will be released in three phases:

  **Limited Release**
  - Phase 1
  - TBD

  **eClaims EDI R3.1**
  - Phase 2
  - January 24, 2022

  **OnBoard**
  - Phase 3
  - TBD
Prior Authorization Requests

- OnBoard: Limited Release will digitize and streamline the PAR process for the following requests:

<table>
<thead>
<tr>
<th>New PAR Name</th>
<th>Old PAR Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmation</td>
<td>previously done using the Attending Doctor’s Request for Optional Prior Approval and Carrier’s/Employer’s Response [Form MG-1]</td>
</tr>
<tr>
<td>Variance</td>
<td>previously done using the Attending Doctor’s Request for Approval of Variance and Carrier’s Response [Form MG-2]</td>
</tr>
<tr>
<td>Special Services</td>
<td>includes the 12 requests related to the Medical Treatment Guideline (MTGs) previously done using the Attending Doctor’s Request for Authorization and Carrier’s Response [Form C-4 AUTH]</td>
</tr>
<tr>
<td>Non-MTGs treatment costing more than $1,000</td>
<td>previously done using Form C-4 AUTH</td>
</tr>
</tbody>
</table>

- After a transition period that the Board will announce with the effective date of OnBoard: Limited Release, paper Form MG-1, Form MG-2, and Form C-4 AUTH will be eliminated when use of OnBoard: Limited Release begins.
Prior Authorization Requests

- Prior authorization of Durable Medical Equipment (DME)
  - Adoption of amendments announced on March 4, 2021, in Subject Number 046-1379
  - wcb.ny.gov/content/main/regulations

- Non-MTGs under or = $1,000

- Medication PARs (replacing the current Drug Formulary Prior Authorization Request process)

Disputed Medical Bills Submission

- Digitize and streamline the intake of Requests for Decision on Unpaid Medical Bill(s) (Form HP-1.0)
Prior Authorization Process

- Sign into the Medical Portal
- Access OnBoard dashboard
- Select “Submit an eForm”
- Begin with entering information
  - Provider delegates will select the provider they are entering information on behalf of
Prior Authorization Process

- Enter the requested information
  - PAR Category
  - CPT Code
  - MTG Site
  - Body Part Information
  - MTG Consistency

- Attach documents as necessary

- Add additional items to a PAR
  - Durable Medical Equipment, for example

- Complete request
## Who Can Do What?

### Prior Authorization Requests (PARs)

<table>
<thead>
<tr>
<th>Medical Bill Disputes (HP-1.0)</th>
<th>Medication</th>
<th>Confirmation</th>
<th>Variance</th>
<th>Non-MTG Under or = $1000</th>
<th>Non-MTG Over $1000</th>
<th>Special Services</th>
<th>DME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acupuncturist</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chiropractor</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Licensed Clinical Social Worker</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Physician</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Physician Assistant</td>
<td>x</td>
<td>x</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Nurse Practitioner</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Podiatrist</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Psychologists</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
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<td></td>
<td>x</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>x</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Occupational Therapist</td>
<td>x</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dentist</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audiologists</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Optometrist</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

wcb.ny.gov/medicalportal/health-care-providers-overview
Registering for the Medical Portal to Access OnBoard: Limited Release
Who Has Access?

All providers who currently have access to the Medical Portal will automatically be registered for OnBoard: Limited Release

- Same NY.gov ID and Password
- Separate and apart from an NY.gov ID used for Department of Motor Vehicles, Tax and Finance, etc.
If You Don’t Already Have Access
Register as a Health Care Provider or Medical Supplier

Health Care Providers
Physicians, PAs, NPs and other types of Board-authorized providers as well as dentists, audiologists and optometrists.

Medical Suppliers
Ancillary medical providers such as: ambulance companies, DMEs, labs, health clinics, hospitals, and pharmacies.

OVERVIEW
ACCESS AND ADMINISTRATION
ADMINISTRATOR LOGIN

OVERVIEW
ACCESS AND ADMINISTRATION
ADMINISTRATOR LOGIN
Medical Portal Registration

Health Care Provider or Medical Supplier?

- If your specialty is listed in the “Who Can Do What” list, you will register for the Medical Portal as a Health Care Provider.
- If your specialty is not listed in the “Who Can Do What” list, you need to register as a Medical Supplier.

Who Can Do What?

- Acupuncturist
- Chiropractor
- Licensed Clinical Social Worker
- Physician
- Physician Assistant
- Nurse Practitioner
- Podiatrist
- Psychologists
- Physical Therapists
- Occupational Therapist
- Dentist
- Audiologists
- Optometrist
Health Care Provider Registration

- Those with their specialty listed will follow the Health Care Providers registration instructions.
- Dentists, Audiologist and Optometrists are not able to become Board-authorized but can request access to the Medical Portal to be able to use OnBoard: Limited Release.

Who Can Do What?

- Acupuncturist
- Chiropractor
- Licensed Clinical Social Worker
- Physician
- Physician Assistant
- Nurse Practitioner
- Podiatrist
- Psychologists
- Physical Therapists
- Occupational Therapist
- Dentist
- Audiologists
- Optometrist
Signing Up for the Medical Portal

Health Care Providers

Visit wcb.ny.gov/medicalportal and select “Access and Administration” under Health Care Providers

Select “Sign Up for Access to the Medical Portal”
Signing Up for the Medical Portal

Health Care Providers

Select “Continue”

Enter the required information
Signing Up for the Medical Portal
Health Care Providers

Information needed:

- Registering Provider Type
- Registering Provider Authorization Status
- Authorization Number (required if Board authorized)
- NYS License Number (required if NYS Licensed Provider)
- NPI (required for all providers)
- HCS ID (Health Commerce System ID) – can select “No” if unsure or you don’t have one
- First and Last Name
- Address
- Phone Number
- Email
Sign Up for the Medical Portal

Health Care Providers

- Three to five business days for the Board to complete the review of a registration
- Once approved, emails will be sent to the user in the application with their NY.gov ID and temporary password
Health Care Provider Roles

Billing Delegate Role

- A user with this role will only be allowed to draft and submit *Form HP-1.0* on behalf of the provider
- If the health care provider uses a billing agent to submit their medical bills, the health care 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
Health Care Provider Roles

Provider Role
- Actual physician, physical therapist, chiropractor, etc.
- Assigns provider and billing delegates who can draft PARs and HP-1s on provider behalf
- Required to send final PAR in OnBoard: Limited Release

Provider Delegate Role
- Draft PARs, which must be reviewed and submitted by the health care provider
- Draft escalations to Level 2 Medication PARs, which must be reviewed and submitted by the health care provider
- Draft PAR escalations for provider review and submission to Level 3 for Medical Director’s Office review
- Respond to insurer requests for information (must be designated by the health care provider from within OnBoard: Limited Release)
- Draft and submit Request for Decision on Unpaid Medical Bills (*Form HP-1.0*)
Medical Suppliers

If your specialty is not listed in the table “Who Can Do What?” and you need to submit *Request for Decision on Unpaid Medical Bill(s) (Form HP-1.0)*, you will need to request access to the Medical Portal as a Medical Supplier.

Medical Suppliers include:

- Ambulance companies
- Durable medical equipment suppliers
- Inpatient hospitals
- Laboratories
- Mental health clinics
- Outpatient clinics
- Outpatient hospitals
- Pharmacies
- Psychiatric hospitals

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**Who Can Do What?**

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Signing Up for the Medical Portal

Medical Suppliers

Visit wcb.ny.gov/medicalportal and select “Access and Administration” under Medical Suppliers

Select “Sign Up for Access to the Medical Portal”
Signing Up for the Medical Portal

Medical Suppliers

Select “Continue”

Enter the required information
Signing Up for the Medical Portal
Medical Suppliers

Required information:
- Medical Supplier Type
- Name
- NPI Number
- FEIN
- Address
- User or Administrator
- First and Last Name
- Address
- Phone Number
- Email
First Time Registration

Medical Suppliers

When registering for the Medical Portal for the first time, you can register multiple administrators and users in a single submission.

After information is added for each user, select the “Add User” button and a new information card will appear. You can continue this until all Administrators and Users are added for the access request.
Medical Supplier Roles

Online Administrators

Keep designated contact and user information current
Use Medical Portal login credentials to access the Medical Supplier Administration Application
There must be at least one administrator; more than one is recommended
Add/Modify users and billing delegates
Add or remove other administrators

Online administrators can sign up and add users today!
Medical Supplier Roles

Users/Billing Delegate

Users are assigned as a billing delegates by the administrator, within Medical Portal administration.

Draft and submit *Request for Decision on Unpaid Medical Bill(s) (Form HP-1.0)* for the medical supplier.

If medical supplier uses billing agent to submit medical bills, the medical supplier’s online administrator will need to set up user accounts for any employee of the billing agent.
System Administration
Health Care Providers & Medical Suppliers
Administrator Login

Visit wcb.ny.gov/medicalportal and select the “Administrator Login” button at the top

Sign in with your Medical Portal username and password

Note: If you have forgotten your Password, you may use the NY.gov Password Self-Service. If you do not remember your Shared Secrets, you may select the Email Activation option to receive a password reset to the email associated to your Medical Portal account.
Select “My Profile” on the left navigation bar
Medical Portal Administration Page

My Profile

My Information
Below is what the Board has on file for you.

Business Name: 
First Name: 
Last Name: 
Address Line 1: 123 State Street
Address Line 2: 
City: Schenectady
State: NY
Zip: 12302
Area Code: (518)
Phone Number: 123-4567
E-mail Address: 

Modify My Data

Your information on file will be displayed
Confirm all information is accurate and up to date
To edit information, select the “Modify My Data” button.
Medical Portal Administration Page

My Profile

Medical Provider Administration

Modify My Data

- First Name: Mary
- M.I.: 
- Last Name: Smith
- Address Line 1: 123 State Street
- Address Line 2: 
- City: Schenectady
- State: New York
- Zip Code: 12302
- Area Code: 518
- Phone Number: 123-4567
- E-mail Address: doctorsmith@email.com

Update information as necessary and select “Continue”
Select “Billing Delegates” on the left navigation bar
The first box displays the current billing delegates in the system. These users will be able to submit Request for Decision on Unpaid Medical Bill (Form HP-1.0).

You can remove or modify user information by selecting the “Remove” or “Modify” button.
The second box shows existing users in the system who can be added as a billing delegate. Select the “Add” button on a user’s row to give that user the ability to submit Request for Decision on Unpaid Medical Bill (Form HP-1.0).
When you click the “Add” button for a user, you will receive a pop-up, confirming a billing delegate has been added.
To add a new user to the system, select Add New User.
Enter in the new user information and select “Continue”. Once submitted, the add user request is sent to the Board for processing. Once processed, the user will receive a User ID and Temporary Password via the email submitted above.
Medical Portal Administration Page

Provider Delegates (not an option for Medical Suppliers)

Select “Provider Delegates” on the left navigation bar
Medical Portal Administration Page

Provider Delegates (not an option for Medical Suppliers)

The first box displays the current provider delegates in the system. These users will be able to submit PARs. You can remove or modify user information by selecting the “Remove” or “Modify” button.
The second box shows existing users in the system who can be added as a provider delegate. Select the “Add” button on a user’s row to give that user the ability to submit PARs.
To add a new user to the system, select the “Add New User” button at the bottom.
Enter in the new user information and select “Continue”. Once submitted, the add user request is sent to the Board for processing. Once processed, the user will receive a User ID and Temporary Password via the email submitted above.
More Registration Information

- Visit wcb.ny.gov/medicalportal and select the links under Health Care Providers or Medical Suppliers
- For questions about the registration process, call Customer Service at (877) 632-4996
- For technical assistance, contact WCBCustomerSupport@wcb.ny.gov
Q: As a DME Supplier, will we be able to submit PARs as a delegate on behalf of the Board-authorized provider?

A: No, only the requesting medical provider may submit prior authorization requests.
How is the denial of an MTG Variance PAR (previously Form MG-2) initiated?

Insurers will receive an MTG Variance in OnBoard: Limited Release from the health care provider. After they submit the denial of the submitted variance, it will go back to the health care provider’s dashboard to escalate if desired.
How will the arbitration process for a *Form HP-1.0* be handled in the new system?

The arbitration process for a *Form HP-1.0* will continue using the same process as it does today.
Updates & What’s Next
Other Board Updates for Providers

- **New York Workers’ Compensation Drug Formulary**
  
  (Drug Formulary) Refill Compliance
  
  - New effective date for amendment regulations will coincide with the launch of OnBoard: Limited Release
  - Revised Formulary currently in the comment period
  - More information in Subject Number 046-1389: Proposed Amendment of 12 NYCRR 441.1, 441.2, 441.3, and 441.5 (New York Workers’ Compensation Drug Formulary Updates)

Reminder - OnBoard: Limited Release will include Medication PARs, and replace the current Drug Formulary available in the Medical Portal.
Other Board Updates for Providers

- **Durable Medical Equipment (DME) Fee Schedule**
  - New effective date for amendment regulations will coincide with the launch of OnBoard: Limited Release
  - More information in Subject Number 046-1379: Adoption of Amendments to Sections 442.2, and addition of 442.4 and 442.5 of 12 NYCRR (DME Fee Schedule)
Other Board Updates for Providers

- Workers’ Compensation Board’s New York Medical Treatment Guidelines
  - Amendment proposed to 12 NYCRR 324.2 to incorporate updates to the New York Non-Acute Pain Medical Treatment Guidelines (MTGs) by reference
  - The Notice of Proposed Rule Making published in the April 14, 2021 edition of the State Register
  - Currently in the comment period
  - Subject Number 046-1394: Proposed Amendment to 12 NYCRR 324.2 (Medical Treatment Guidelines)
Other Board Updates for Providers

- Workers’ Compensation Board’s New York Medical Treatment Guidelines (cont’d)
  - The following become effective with Limited Release:
    - Hand, Wrist and Forearm Injuries (these guidelines will replace the Carpal Tunnel MTGs)
    - Occupational/Work Related Asthma
    - Ankle and Foot Injuries
    - Elbow Injuries
    - Hip and Groin Injuries
    - Occupational Interstitial Lung Disease
    - Post-Traumatic Stress Disorder
    - Work-Related Depression and Depressive Disorders
  - Updated MTGs
    - Mid and Low Back, Neck, Shoulder and Knee
  - Coming MTGs
    - Traumatic Brain Injury
    - Eye Disorders
Reference Materials

- Fact sheet for health care providers
- New OnBoard: Limited Release frequently asked questions for providers
- OnBoard: Limited Release Webinar slides and recordings
- New Medical Portal registration pages on the Board website wcb.ny.gov/medicalportal
Future Provider Training

- Just-in-time training webinars
- Webinar series
- Training guides and video tutorials
- Q&A webinars
- Website content
- Support channels
Next Steps

- Get early access!
- Review the new registration webpages at wcb.ny.gov/medicalportal
- Review your current paper or fax-based systems. You will no longer be using these!
- Share this information with your colleagues!
Stay Engaged

- wcb.ny.gov/onboard
  - Overview, timeline, FAQs, resources
- Subscribe for OnBoard Updates
  - Subscribe to receive email updates on all things OnBoard!
- Email OnBoard@wcb.ny.gov
- wcb.ny.gov/medicalportal
- Questions?