I. Overview
Medical suppliers need access to the Medical Portal to use OnBoard: Limited Release to submit a Request for Decision on Unpaid Medical Bills (Form HP-1.0). The information in this guide details how to request (or register) for access and how to designate and manage user roles in the system.

II. Medical Portal access
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, and you need to submit Form HP-1.0 on behalf of your organization, you will register as a medical supplier. If you are one of these types of health care providers, follow the registration guide for health care providers.

If submitting Form HP-1.0 on behalf of an individual health care provider, you should have that provider add you as a Delegated User if they have not done so already. For details on providers adding delegates, view the registration guide for health care providers.

III. Role types

<table>
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<tr>
<th>Medical Supplier Roles</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td><strong>Online Administrator</strong></td>
<td>• Uses Medical Portal login credentials to access the medical supplier administration application.</td>
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<tr>
<td>Required to create and keep designated contact and user</td>
<td>• Adds/modifies users and billing</td>
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information current. There must be at least one Online Administrator; more than one is recommended. 

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<th>delegates.</th>
<th>Adds or removes other Online Administrators.</th>
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**Billing Delegate (User)**

*OnBoard users are assigned as a Billing Delegate by the Online Administrator within Medical Portal administration.*

- Adds or removes other Online Administrators.
- Drafts and submits *Form HP-1.0* for the medical supplier.
- If medical supplier uses a 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 who will be allowed to submit *Form HP-1.0* on behalf of the medical supplier.

**IV. Requesting access to the Medical Portal for medical suppliers**

2. Select **Access and Administration** under Medical Suppliers.
3. Select **Requirements** in the left column. Then select **Sign Up for Access to the Medical Portal**.
4. Review the information on this page. Then select Continue.

5. In the Medical Supplier Information tab, enter the registering medical supplier type, name, National Provider Identifier (NPI) number, Federal Tax Identification Number (FEIN) and address. Select Next.
6. In the User Information tab, begin by entering the information for the Administrator role. After entering the Administrator information, select **Add User** to add a user to the registration. Continue selecting **Add User** until you have entered user information for all users. Select **Submit**. If your organization already has an Administrator registered for the Medical Portal, the Administrator can add new users within Medical Portal administration.
7. After selecting **Submit**, the Registration Complete page 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, online administrators, and users for medical suppliers**

Medical supplier Online Administrators can manage other delegated Online Administrators and 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.

2. Select Administrator Login.
3. Enter your Medical Portal NY.gov ID username and password.

4. The Medical Supplier Administration page will allow you to manage your profile, other Online Administrators, and users in the system. The first option in the menu is My Profile. Select My Profile to edit your profile information.
5. Confirm the information is accurate. The mailing address in your profile will be used for communications from the Board. 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 **Online Administrators** to remove, modify, or add new Online Administrators.

8. The Online Administrators page will show two boxes. The first box lists administrators who are currently designated as an Online Administrator. To remove an Online Administrator, select the **Remove** button in that Online Administrator’s row. The Online Administrator’s information will move from the first box to the second box. Use the **Modify** button to update information for an Online Administrator. Note: There must be at least one Online Administrator. You can’t remove yourself.
9. The second box shows a list of users who do not have an Online Administrator designation. To designate an Online Administrator, 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 an Online Administrator. Select **Add New User**.
11. Enter the new user information. Once submitted, the add user request is 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 form. Select **Continue**.

12. Select **Users** to remove, modify, or add new users to submit *Form HP-1.0* in OnBoard: Limited Release.
13. The Users page will show two boxes. The first box lists users who are designated to submit *Form HP-1.0*. To remove a user, 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 user.

14. The second box shows a list of users who are not designated. To designate a user, 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. Select Add New User.

16. Enter the new user information. Once submitted, the add user request is 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**.
VI. Need help?

Medical Portal access: 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