




# User Guide - Contact Management for EDI Enrollment

Purpose: Detailed user guide for how to manage contacts in Madaket's portal.

## Medical Group Contacts

At the Medical Group (TIN) level in Madaket, you can store two types of contacts, Primary and Billing Contact.

- Primary Contact - This contact will receive all email correspondence from Madaket related to provider required action (i.e. forms for signature, provider driven portal instructions).
  - Secondary Contact - Not required but if added to the Medical Group will also receive all email correspondence from Madaket
- Billing Contact - This contact will be applied to all enrollment forms and portals that require a 'Billing Contact' (most common for EFT enrollments).

 **Medical Groups**

Site ID: 12345  
**Test Medical Group**  
TIN: 12-3456789

NPIs

**General**

Locations & Providers

Transaction Details

Signatures

Banking Info

Email List

Open Enrollments

Custom IDs

Group Information

Name(legal)

Test Medical Group

Other name(DBA)

Parent Group Name

RCM Partner

Madaket Placeholder Partner

Site ID

12345

Practice type

Speciality Group

TIN

12-3456789

Shared TIN (?)

No

Is this TIN an SSN?

No

Edit

Contacts

Michael Scott

Manager

Primary Contact

123 Dunder Mifflin St.

Scranton, PA 18507

michael.scott@madakethealth.com

01230000

Dwight Schrute

Manager

Secondary Contact

123 Dunder Mifflin St

Scranton, PA 18075

dwright.s@madakethealth.com

04567876

Jim Halpert

Billing Rep

Billing Contact

123 Dunder Mifflin St.

Scranton, PA 18507

jim.halpert@madakethealth.com

01230000

ADD ENROLLMENT CONTACT

RECEIVED EMAIL

RECEIVED EMAIL

madakethealth.com



## Practice Location Contacts

At the Practice Location (NPI) level in Madaket you are able to support multiple 'form contacts' and create associations with specific plans as required.

In the 'NPIs' section of a Medical Group there are four (4) tabs to support each Practice Location -

- Plans - Add and manage plans for enrollment requests
- NPI Details - Practice location name and address (\*will be used on forms and portals)
- Form Contacts - Contact(s) who will be used on forms and portals based on their associations.
- Banking Profiles - Associate bank accounts (current and previous) to an NPI or specific plans under an NPI.

**NPIs** General Locations & Providers Transaction Details Signatures Banking Info Email List Open Enrollments Custom IDs

**Head Office**  
NPI: 1588738165 (Type 2)

NPI: 1588738165 (Type 2)  
Head Office  
14 Webster St  
Arlington MA, 02474  
Last updated: 09/24/2018

Clone Medical Group Add NPI

**Plans**  
**NPI Details**  
**Form Contacts**  
**Banking Profiles**

**NPI** Edit  
NPI: 1588738165

**Location Information** Edit  
**Address**  
14 Webster St  
Arlington, MA 02474

**Date Information**  
Create Date: 09/24/2018  
Last Updated: 09/24/2018  
Go Live Date:

## Managing Form Contacts

- Default Contact - All NPIs require a minimum of one contact which will be used across all plans. When creating or editing the default contact within the 'Add Contact' pop-up window, it will be identified as the 'Default Contact.'



- Additional Contacts - By clicking 'Add Contact' a pop-up window will open to create a new contact. When creating the contact you must select which plans the contact will be associated with (will override the Default Contact for selected plans).
  - To associate a plan with a contact the plan must be added to the NPI prior to creating the association for the contact.
  - In the 'Create Contact' window, you must identify the plans to be associated with the contact in the 'Plan settings' section of the window.

- Managing Contact Associations - You can view contacts and their associations within the 'Form Contacts' tab and the 'Plans' tab if not the default contact.



Form Generation Contacts		Form Contacts Tab View
Contact	Plans	
★ <b>Rob Bradley</b> ← Default Contact Director rob@madakethealth.com (978) 857-0233	All(except overridden plans)	
<b>John Doe</b> ← Plan(s) Specific Contact j.doe@madakethealth.com (978) 654-3567	Tricare East - Training	

Plans Tab View		
Plan	Form Contact	ERA
<b>Champ VA</b> Plan ID: 84146 Professional		<input type="checkbox"/> 9/24/18 ✓ 76
<b>CORESOURCE - Training</b> Plan ID: 228 Professional		<input type="checkbox"/> 9/25/18 ✓ 68
<b>Medicaid of Florida (Digital Sig)</b> Plan ID: 54321 Professional		<input type="checkbox"/> N/A
<b>Tricare East - Training</b> Plan ID: 6767 Professional	<b>John Doe</b> j.doe@madakethealth.com	<input type="checkbox"/> 9/25/18 ✓ 67