



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

| | | |
|--|--|---|
| <input checked="" type="checkbox"/> Edit | Contacts | <input type="button" value="Add Enrollment Contact"/> |
| 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 <input checked="" type="checkbox"/> | |
| Shared TIN (?) | No | |
| Is this TIN an SSN? | No | |

Contacts

| | | | |
|---|--|---|--|
|  Michael Scott | <input type="checkbox"/> Primary Contact | 123 Dunder Mifflin St. Scranton, PA 18507 | <input type="button" value="RECIPIENT EMAIL"/> |
|  | michael.scott@madakethealth.com | | |
|  | 01230000 | | |
|  Dwight Schrute | <input type="checkbox"/> Secondary Contact | 123 Dunder Mifflin St. Scranton, PA 18075 | <input type="button" value="RECIPIENT EMAIL"/> |
|  | dwight.s@madakethealth.com | | |
|  | 04567876 | | |
|  Jim Halpert | <input type="checkbox"/> Billing Contact | 123 Dunder Mifflin St. Scranton, PA 18507 | <input type="button" value="RECIPIENT EMAIL"/> |
|  | jim.halpert@madakethealth.com | | |
|  | 01230000 | | |



Practice Location Contacts

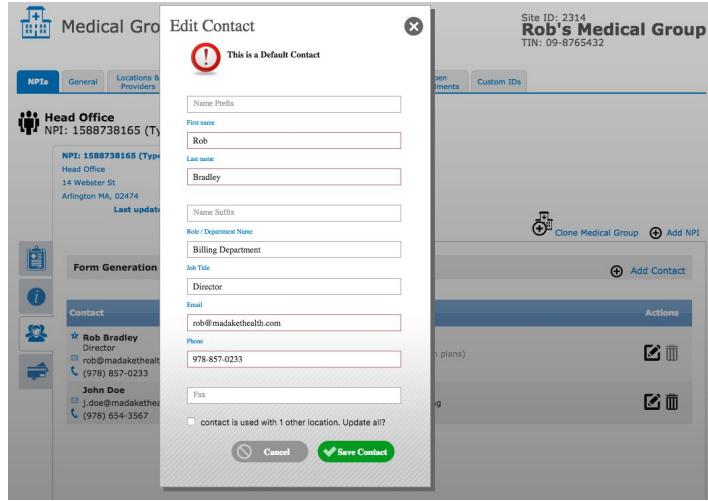
At the Practice Location (NPI) level in Madaket you are able to support multiple 'form contacts' and create associations with specific plans as required.

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

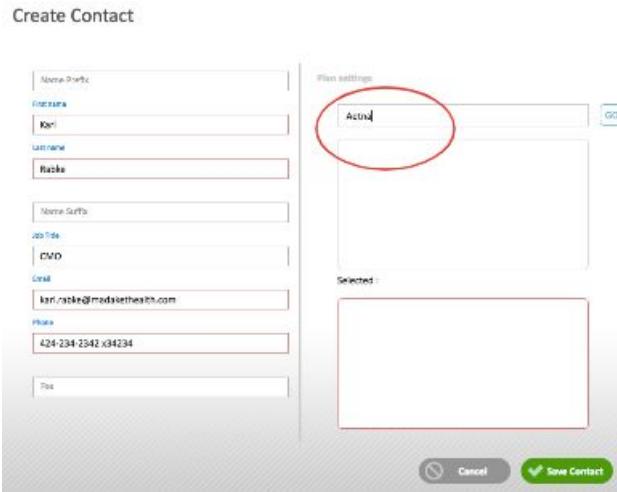
- Plans - Add and manage plans for enrollment requests
- NPI Details - Practice location name and address (*will be used on forms and portals)
- Form Contacts - Contact(s) who will be used on forms and portals based on their associations.
- Banking Profiles - Associate bank accounts (current and previous)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

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**

| Contact | Plans |
|---|------------------------------|
| Rob Bradley <small>Director</small> rob@madakethhealth.com (978) 857-0233 | All(except overridden plans) |
| John Doe <small>Plan(s) Specific Contact</small> j.doe@madakethhealth.com (978) 654-3567 | Tricare East - Training |

Plans Tab View

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