Customer Guide

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EDI Enrollment Management

Enrollment Lifecycle

Overview

When Madaket receives an enrollment request the system will process the request to either, Sent to Provider for Action (signature or self-service portal), or, Sent to Payer/Trading Partner for Processing. Once the provider action (if applicable) is complete, Madaket will deliver the enrollment request to the associated Payer/Trading Partner. When Madaket receives confirmation that an enrollment request has been processed it will be reflected in Madaket's system as approved or rejected.

Processing Time

Enrollment requests will be processed by Madaket within 1 business day of receipt and delivered to either the - Provider, or, Payer/Trading Partner - for their required action.

Provider Management

Objective

Madaket contacts the Provider (Medical Group's Primary Contact) to ensure their enrollment actions are completed as quickly as possible. Actions may include - signing enrollment forms, completing self-service enrollment portals.

Process

Madaket will contact the Provider up to 4 times across 35 business days from the initial enrollment request date to ensure their action is completed.

Approval of Enrollment Requests

Objective

Proactively retrieve the final status from the Payer/Trading Partner once an enrollment request has been processed.

Process

Madaket's system will automatically contact the Payer/Trading Partner to retrieve the status on the day an enrollment request is expected to be approved. Once the final status is confirmed it will be captured within Madaket's system for customers to view.

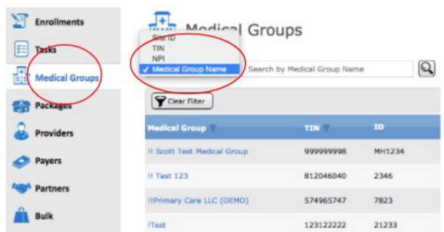
Supporting Common Questions and Actions

This section provides an overview of how to navigate and use the Madaket Portal to support common questions and actions.

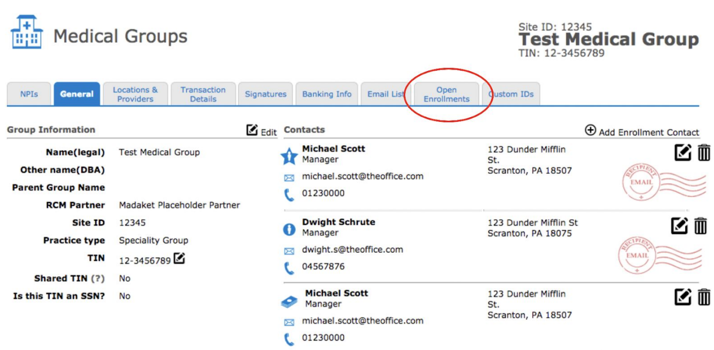
Enrollment Status

When inquiring about the status of an enrollment, follow the below steps:

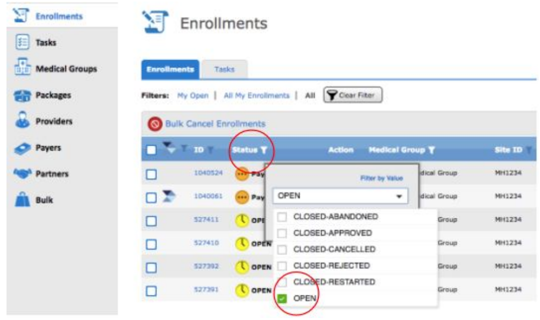
1. Identify the associated - Medical Group Name, TIN, or NPI
2. In Madaket, open the 'Medical Group' Tab and search for the Medical Group in question.
3. Search by TIN, NPI, or Medical Group Name



4. Once the Medical Group is found, click on the associated hyperlink to view the Medical Group.
5. In the Medical Group view, click on the 'Open Enrollments' Tab to view all associated enrollments.



6. In the 'Enrollments' tab you will automatically view all 'Open' enrollments associated with the Medical Group.

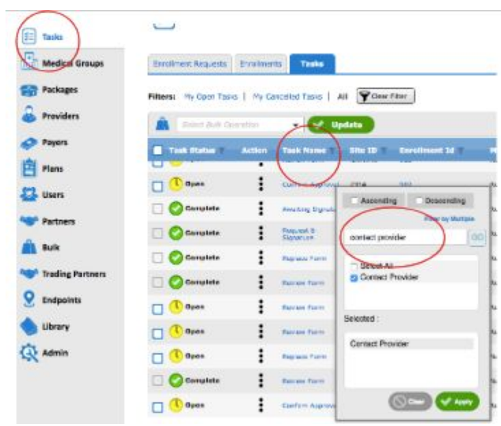


7. To see the Medical Group's enrollment history you can modify the 'Status' accordingly or uncheck all statuses to see the full history.

Which Enrollments are Pending Provider Action?

To quickly identify enrollments that are open and require provider action, follow the below steps.

1. Navigate to the 'Tasks' tab in Madaket
2. In the Task list view, filter the view by clicking on the column header 'Task Name' and in the search field type 'Contact Provider' and click 'Go'. In the below window, check the task you are looking for and then click 'Apply'. This will display all enrollments that are pending provider action.

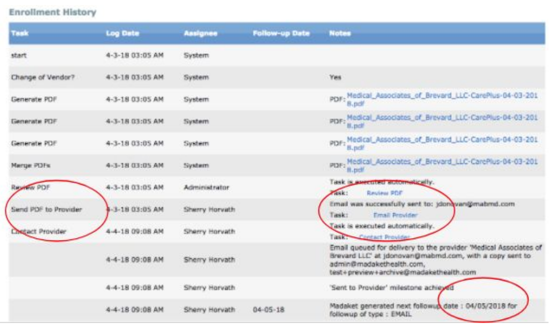


3. Additionally, you can set filters on the other available columns to view specific Medical Groups, plans, tasks, etc.

When was a Provider Contacted by Madaket?

To determine when a provider was contacted by Madaket or view the enrollment history follow the below steps.

1. Once you have found the enrollment in question, open the enrollment by clicking on the ID hyperlink. This will provide a detailed overview of the enrollment. All actions are captured at the bottom of this page in what is called the 'Enrollment History' section. In the Enrollment History you can see when the provider received an email from Madaket and the associated enrollment form(s).



Enrollment History

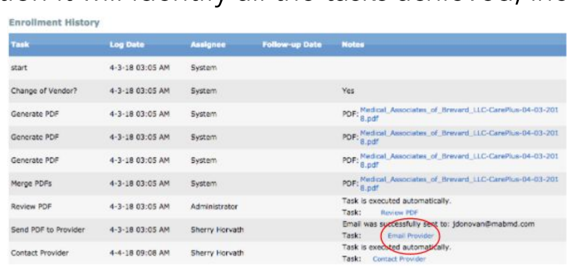
Task	Log Date	Assignee	Follow-up Date	Notes
start	4-3-18 03:05 AM	System		
Change of Vendor?	4-3-18 03:05 AM	System		Yes
Generate PDF	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Generate PDF	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Generate PDF	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Merge PDFs	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Review PDF	4-3-18 03:05 AM	Administrator		Task is executed automatically. Task: Review PDF
Send PDF to Provider	4-3-18 03:05 AM	Sherry Horvath		Email was successfully sent to: jdonovan@mabmd.com Task: Email Provider
Contact Provider	4-4-18 09:08 AM	Sherry Horvath		Task is executed automatically. Task: Contact Provider
	4-4-18 09:08 AM	Sherry Horvath		Email queued for delivery to the provider 'Medical Associates of Brevard LLC' at jdonovan@mabmd.com, with a copy sent to admin@madakethealth.com, test+preview+archive@madakethealth.com
	4-4-18 09:08 AM	Sherry Horvath		'Sent to Provider' milestone achieved
	4-4-18 09:08 AM	Sherry Horvath	04-05-18	Madaket generated next followup date : 04/05/2018 for followup of type : EMAIL

2. Additionally, if applicable, the Enrollment History includes when the Provider will be contacted again by Madaket.

Resend Forms to a Provider

If enrollment forms need to be resent to providers, follow the below steps. These steps are applicable for - wet signatures, digital signatures and self-service portal instructions.

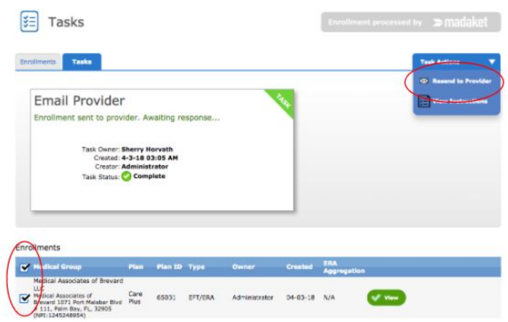
1. Open the associated enrollment(s) in Madaket and navigate to the Enrollment History section. In this section it will identify all the tasks achieved, including 'Email Provider'



Enrollment History

Task	Log Date	Assignee	Follow-up Date	Notes
start	4-3-18 03:05 AM	System		
Change of Vendor?	4-3-18 03:05 AM	System		Yes
Generate PDF	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Generate PDF	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Generate PDF	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Merge PDFs	4-3-18 03:05 AM	System		PDF: Medical_Associates_of_Brevard_LLC-CarePlus-04-03-2018.pdf
Review PDF	4-3-18 03:05 AM	Administrator		Task is executed automatically. Task: Review PDF
Send PDF to Provider	4-3-18 03:05 AM	Sherry Horvath		Email was successfully sent to: jdonovan@mabmd.com Task: Email Provider
Contact Provider	4-4-18 09:08 AM	Sherry Horvath		Task is executed automatically. Task: Contact Provider

2. Click on the 'Email Provider' hyperlink which brings you to a view of this task in Madaket.
3. In this view you can select all of the enrollment forms that you want to resend to the provider by checking the associated boxes. From the 'Task Actions' drop down, select 'Resend to Provider'. An email including the applicable forms will automatically be generated and sent to the provider.

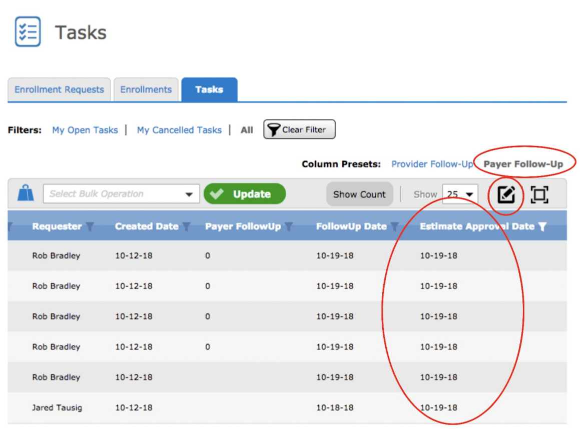


4. Every time enrollment forms are sent to a provider Madaket's system captures this action (time and day) in the Enrollment History.
5. Additionally, if preferred, you can download enrollments forms (PDFs) from the Enrollment History for each enrollment. This action will not be tracked in Madaket.

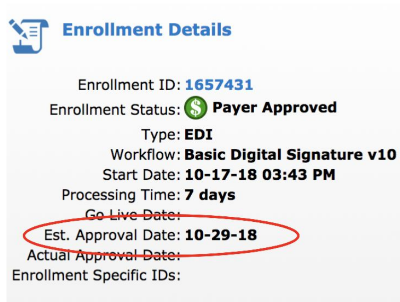
When Will an Enrollment Be Approved?

Follow the below steps to identify when an enrollment is expected to be approved.

1. Navigate to the 'Task' tab to view all open tasks. In this view, the date for each enrollment under the column header 'Estimated Approval Date' will display the expected approval date for each enrollment.
    a. Click on the 'Column Preset' labeled 'Payer Follow-Up' to ensure the appropriate columns are displayed.
    b. Alternatively, you can add/remove columns to the table by clicking on the 'Edit' button and checking/unchecking columns as needed.

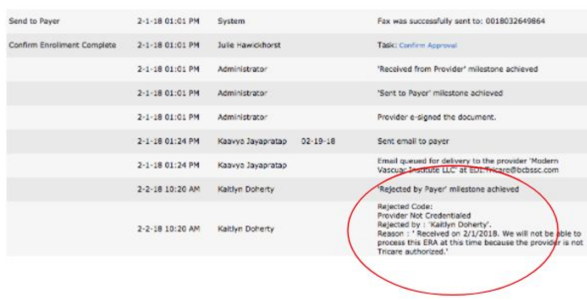


2. The estimated approval date can also be viewed in the detailed enrollment view for each enrollment in Madaket. Additional information, if applicable, will also be included in the Enrollment History section of the enrollment.



Why Was an Enrollment Rejected?

If an enrollment is rejected by the payer/trading partner the enrollment status will be 'Payer Rejected' and the enrollment closed. The reason for rejection will be included in the enrollment's Enrollment History. There will always be an associated rejection code included and, if applicable, a note with more detail.

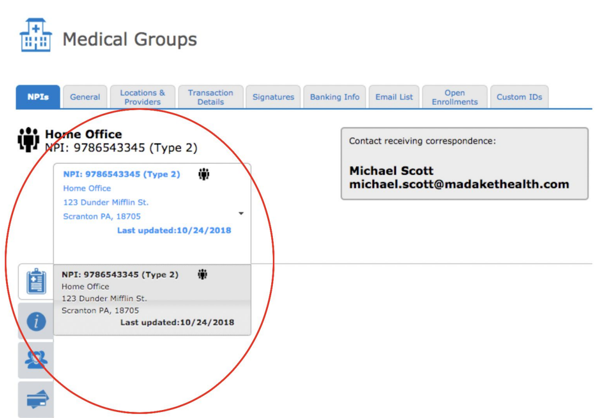


Send to Payer	2-1-18 01:01 PM	System		Fax was successfully sent to: 0018032649864
Confirm Enrollment Complete	2-1-18 01:01 PM	Julie Hawickhorst		Task: Confirm Approval
	2-1-18 01:01 PM	Administrator		'Received from Provider' milestone achieved
	2-1-18 01:01 PM	Administrator		'Sent to Payer' milestone achieved
	2-1-18 01:01 PM	Administrator		Provider e-signed the document.
	2-1-18 01:24 PM	Kaavya Jayapratap	02-19-18	Sent email to payer
	2-1-18 01:24 PM	Kaavya Jayapratap		Email queued for delivery to the provider 'Modern Vascular Institute LLC' at EDI.Tricare@bcbssc.com
	2-2-18 10:20 AM	Kaitlyn Doherty		'Rejected by Payer' milestone achieved
	2-2-18 10:20 AM	Kaitlyn Doherty		Rejected Code: Provider Not Credentialed Rejected by : 'Kaitlyn Doherty'. Reason : ' Received on 2/1/2018. We will not be able to process this ERA at this time because the provider is not Tricare authorized.'

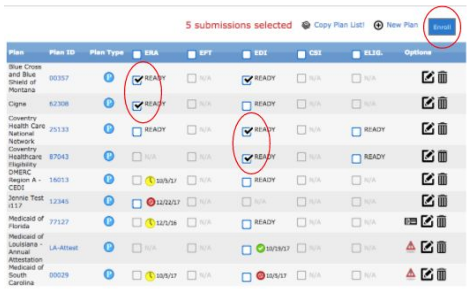
How to Request an Enrollment?

To request an enrollment using the Madaket portal, follow the below steps.

1. Go to the Medical Group in Madaket that you want to start an enrollment for.
2. In the Medical Group view, navigate to the 'NPIs' tab. Once in the 'NPIs' tab, select from the dropdown the correct NPI you want to enroll.



3. After selecting the NPI to enroll, you will be shown a list of available plans and their corresponding 'plan type' (P = Professional, I = Institutional) and transaction types available to enroll with. Transactions types greyed out are not available to enroll.
4. Check the available boxes under the transaction types for the corresponding plans you want to enroll with and then click the 'Enroll' button.



   a. If a plan you selected requires a unique provider ID (ex. Medicare PTAN, Medicaid Provider ID), you must add this ID prior to requesting an enrollment.
      i. On the right side of the plan screen view you will see an icon (like the two below) indicating if a 'legacy ID' is required and if has or has not been added. The 'warning' icon indicates that the ID is required but has not been added.

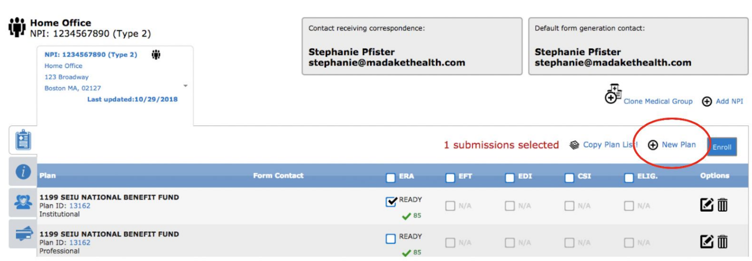
      ii. To add a 'legacy ID' click on the 'edit' icon (pencil image) and a pop-up, 'Edit Plan' window will appear. In this window, add the provider ID in the 'PTAN' data field available and click 'Save'. Now you can proceed with 'Step 5'.

5. Once you have clicked 'Enroll' you may receive some pop-up warning messages which you should click through. The warnings are related to provider signatures which will be acquired when the enrollments are processed.
6. After clicking 'Enroll' the enrollment requests will be received by Madaket to process. You will be able to monitor the status of each enrollment as Madaket processes each.

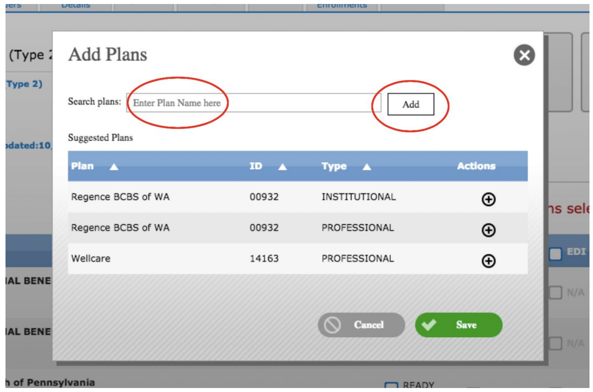
Adding Plans

Follow the below steps if you need to add a plan(s) to an NPI before requesting an enrollment.

1. Navigate to the 'NPIs' tab of the Medical Group.
2. Once you have identified the NPI you want to enroll for you will see a list of available plans. If the plan you want to enroll with is not included, click the 'New Plan' button to add the plan.



3. A pop-up window will appear to allow you to add new plans. In this window, you can search for plans by - Name or Plan ID. Once you have found the plan, click 'Add' and then scroll to the bottom of the window and click 'Save'.



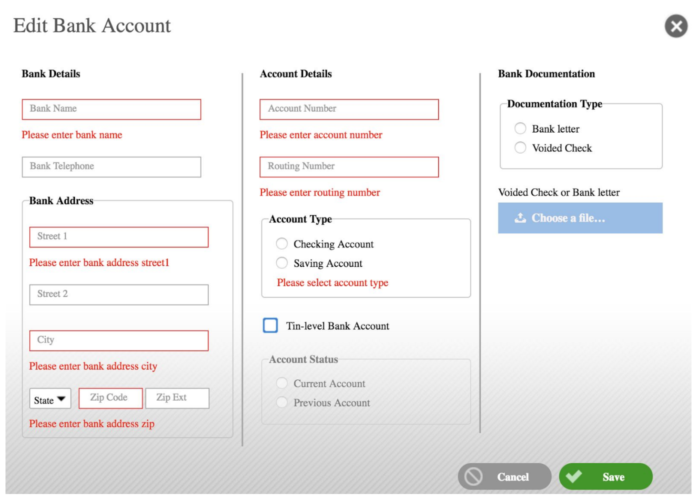
4. Once the plan has been added it will be included in the list of plans to enroll with.
5. If you are unable to identify the required plan, contact Madaket Support - support@madakethealth.com.

Managing Bank Profiles and Bank Account Associations

Follow the below steps if you need to add a Bank Account and/or Account Associations.

Under the 'Banking Info' tab on the Medical Groups page, you can Add or Edit a Bank Account. To add an Account, navigate to the top right hand corner and click 'Add Account'.

⊕ Add Account

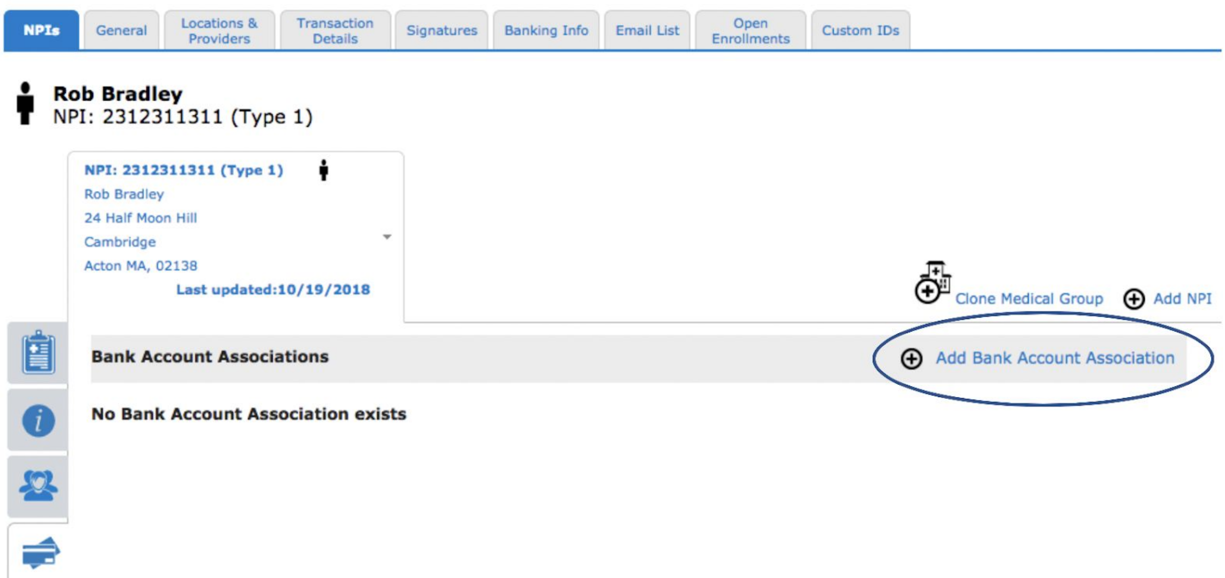


1. Bank Name, Address (City, State, and Zip), Account Number, Routing Number, and Account Type are required fields.
2. Bank Documentation can be provided in two types - Bank Letter or Voided Check. When uploading the Voided Check or Bank letter, the file must be in PDF format.

3. You can also indicate whether this is a ‘TIN-level’ Bank Account. TIN level bank accounts default to all NPIs and all plans under the NPIs. TIN level bank accounts will be designated with a STAR icon. You have the ability to assign an ‘Account Status’ as either ‘Current’ or ‘Previous’. ‘Previous’ bank account information may be needed on some EFT enrollments.
4. On the ‘Bank Profiles’ icon  under the ‘NPIs’ tab on the Medical Groups page, you have the ability to associate bank accounts (and mark with an ‘Account Status’ - current and previous) to an NPI or to specific plan/plans under an NPI.

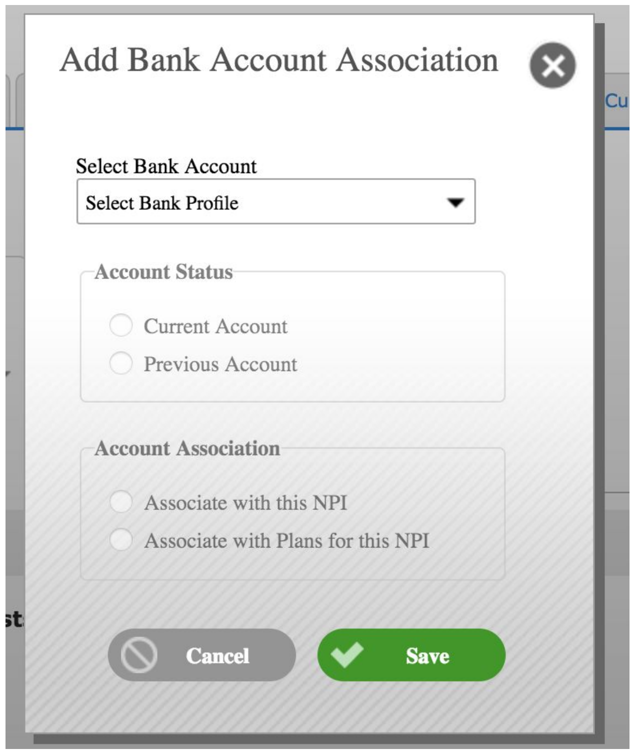
-  = Previous
-  = Current

5. To set up an association click on ‘Add Bank Account Association’.



6. To associate a Bank Account, select the profile you wish to associate from the dropdown. Then select whether this is a Current or Previous Account. Finally, indicate whether you intend to associate this account with the NPI or specific plan(s) for this NPI.

7. To associate a Bank Account, select the profile you wish to associate from the dropdown. Then select whether this is a Current or Previous Account. Finally, indicate whether you intend to associate this account with the NPI or specific plan(s) for this NPI.



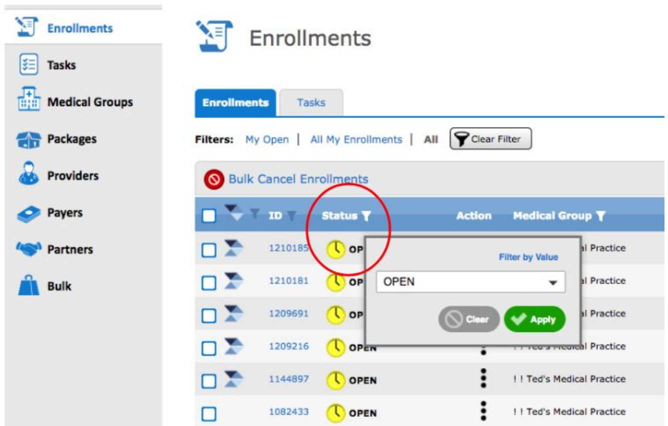
Updating Medical Group and Provider Data
It is not recommended to modify Medical Group or Provider Data in Madaket. The data is populated in Madaket by API calls (i.e., Customer portal to Madaket) and any manual changes will be overwritten by the API calls. For additional questions, contact Madaket Support - support@madakethealth.com.

Tracking and Reporting
This section provides an overview of how to manage general tracking and reporting using Madaket's portal.

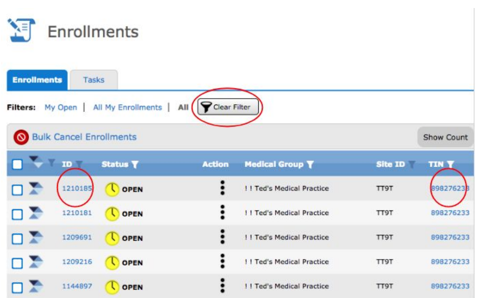
Enrollments

Enrollments is a view into all enrollments.

- Custom Views - Each column in the list view can be filtered using the filter icons dropdowns at the top of each column you can filter on one or multiple columns to create custom views of enrollments.



- For more detailed information a user can click on the available hyperlinks.
  - ID - This is the unique ID for each enrollment. Users can click on the ID to see a detailed overview of the associated enrollment
  - TIN - By clicking on a specific TIN you will open the Medical Group for the associated enrollment.



  - When changing views it is recommended to click 'Clear Filter' prior to setting a new custom view.

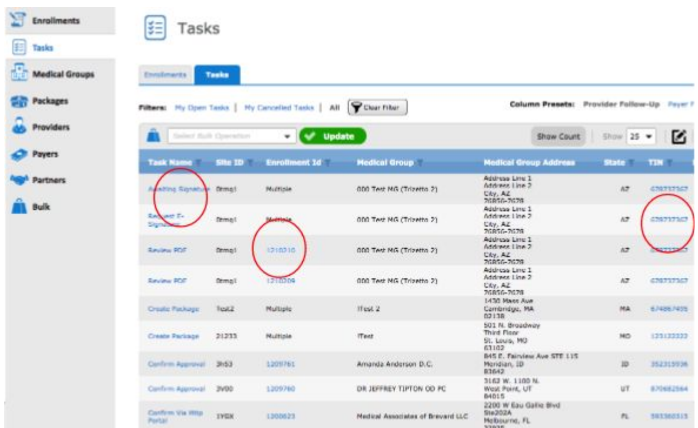
Tasks

View of all tasks for enrollments.

- The Tasks tool allows users to view all tasks associated with their enrollments. This view is helpful for identifying enrollments that are at stages such as - 'Awaiting Signature' or

'Confirm Approval'- as a user can quickly view which enrollments are waiting action from providers, payers, etc.

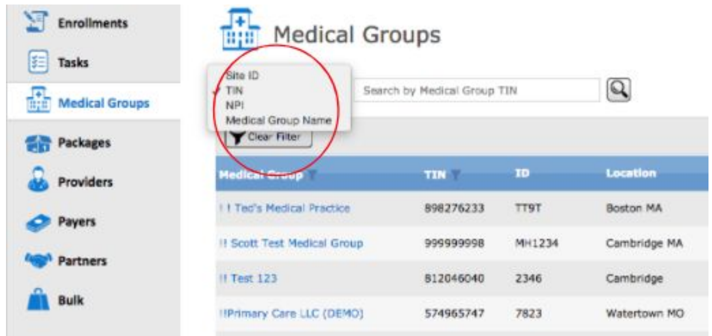
- Custom Views - Similar to the Enrollments tool, users can customize their views by using the filter icon dropdowns at the top of each column.
- Using the hyperlinks users can view more detailed information related to the enrollment, task or Medical Group.
    - Task Name - By clicking on a task a user will open a detailed view of the specific enrollment task
    - Enrollment ID - By clicking on an Enrollment ID a user will open a detailed view of the enrollment
    - TIN - By clicking on a TIN a user will open the Medical Group view associated with the specific task



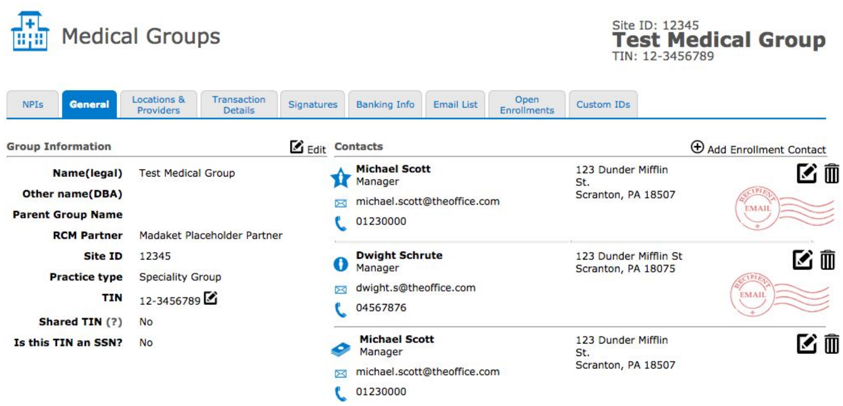
Medical Group and Provider Management

Using the Medical Group tool users can view and manage all of their Medical Groups and associated Providers.

- Searching for a Medical Group - Open the Medical Group tool which brings a user to the Medical Group list view. Using the dropdown you can choose how to search for a specific Medical Group.
    - Search by - TIN, NPI, or Medical Group Name



- Once a user finds the Medical Group they can click on the Medical Group name hyperlink to view the Medical Group.



- Navigating the Medical Group tabs -
  - General - Practice information
  - Locations & Providers - Details all associated NPIs, broken down by service location and NPI type
  - Signatures - Digital signatures are stored here for future enrollments
  - Banking Info - Bank information stored here for EFT enrollment
  - Open Enrollments - View open and enrollment history of Medical Group
  - NPIs - View NPIs, Group (Type 2) and Individual (Type 1), for the Medical Group
    - When a user selects an NPI, all available plans will be displayed


Medical Groups
NPIs
General
Locations & Providers
Transaction Details
Signatures
Banking Info
Email List
Open Enrollments
Custom IDs
Home Office
NPI: 1234567890 (Type 2)
Contact receiving correspondence:
Stephanie Pfister
NPI: 1234567890 (Type 2)
Home Office
123 Broadway
Boston MA, 02127
Last updated:10/29/2018
NPI: 1234567890 (Type 2)
Home Office
123 Broadway
Boston MA, 02127
Last updated:10/29/2018
Group
NPI: 2345678900 (Type 1)
Stevie Nicks
123 Broadway
Boston MA, 02127
Last updated:10/29/2018
Individual
Form Contact
ERA
READY
85