NCMMIS
Provider User Provisioning Participant User Guide (Provider)

PREPARED FOR:

North Carolina Department of Health and Human Services

Office of Medicaid Management Information System Services

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SUBMITTED BY:

CSC

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ATTENTION - THIS TRAINING IS FOR STATE OF NORTH CAROLINA EMPLOYEES ONLY OR THEIR AUTHORIZED REPRESENTATIVES.

Document Revision History

Version	Date	Description of Changes
D1.0.1	March 19, 2013	Initial submission.
D1.0.2	March 28, 2013	Second submission.
V1.0	April 03, 2014	Final Version
D1.1.1	March 18, 2014	5010 update.
V1.1	March 20, 2014	Final

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1.0 Welcome

1.1 COURSE OVERVIEW

Welcome to the NCTracks Provider User Provisioning training. The new NCTracks Provider Portal has a variety of features to assist in managing provider records and information to more effectively support providers as they service Department of Health and Human Services (DHHS) recipients. One of the features of the new NCTracks Provider Portal is the ability for providers to control the level of access they give to their staff members. Staff members can be granted access based on their area of responsibility. For example, front office staff may need access to recipient eligibility information, but may not be involved with submitting claims.

Every provider will need to identify an Office Administrator to grant staff member access to the NCTracks Provider Portal and its functionality. Access will be based on the staff member's job functions. An Office Administrator can be the Office Administrator for one or more NPIs.

Note: All individuals who access the new system will require an NCID. All Owners and Managing Employees must be reported in order for the individual to be provisioned.

1.2 COURSE BENEFITS

- The purpose of this training is to teach users how to:
- Establish an Office Administrator
- Create users within their office

1.3 COURSE OBJECTIVES

At the end of training, as an authorized Office Administrator, users will be able to do the following:

- Establish an Office Administrator
- Access and navigate the User Administration section of the Provider Secure Portal
- Add, maintain, and delete provider groups
- Add, maintain, and delete users
- Disable, enable, and reset users' Electronic Signature PINs

1.4 PREREQUISITES

Before taking this course, it is required that the user first completes the following courses:

- HIPAA Security & Privacy Training
- NCTracks Overview (CBT)
- Office Admin Functions (CBT)

NOTES

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2.0 Establishing the Office Administrator

2.1 INTRODUCTION

The process for establishing the Office Administrator is broken out into two groups:

- Legacy – which are currently enrolled Providers
- New Providers – any new providers who apply after the NCTracks go-live date

2.2 OBJECTIVES

This training will take the user through the process of navigating through the User Administration section of the Provider Secure Portal in the NCTracks system. The user will work with Provider Groups, Users, and Electronic Signature PIN management.

In this document, each section will have a graphic illustration followed by a **step**. The numbers on the image will correspond with the numbers in the **steps**.

2.3 HELP SYSTEM

The major forms of help in the NCTracks system are as follows: (Refer to Addendum A):

- System Level Help: Indicated by the “NCTracks Help” link on each page
- Page Level Help: Indicated by the “Help” link above the Legend
- Legend
- Data/Section Group Help: Indicated by a question mark (?)
- Hover over or Tooltip Help on form elements
- Navigational Breadcrumbs

NOTES:

2.4 CURRENTLY ENROLLED PROVIDER NCTRACKS REGISTRATION

A "Currently Enrolled Provider" (CEP) NCTracks Registration process has been developed to enable providers to submit this important information prior to go-live. The CEP process can be accessed from the current Enrollment, Verification, and Credentialing website (www.nctracks.nc.gov).

> **Currently Enrolled Provider NCTracks Registration**
>
> This July, the North Carolina Department of Health and Human Services (DHHS) is moving to an entirely new multi-payer processing system for four of its agencies - the Division of Medical Assistance (DMA), the Division of Mental Health, Developmental Disabilities, and Substance Abuse Services (DMH), the Division of Public Health (DPH), and the Office of Rural Health and Community Care (ORHCC).
>
> Legacy MMIS+ providers are required to complete the Currently Enrolled Provider NCTracks Registration Application to provide our new system, NCTracks, with several critically important data elements.
>
> CSC will mail each Legacy MMIS+ provider (one letter per National Provider Identifier [NPI]) an NCTracks Registration Letter that contains your Authorization Code, which is required to complete the Currently Enrolled Provider NCTracks Registration Application. Once you have received the letter, you may submit the registration application.
>
> ---
>
> **Note**: The letters will be mailed in batches beginning late February 2013. If you have not received your letter by May 1, 2013, please contact the CSC EVC Call Center at 1-866-844-1113 or by e-mail at NCMedicaid@csc.com.

Exhibit 1. Currently Enrolled Provider NCTracks Registration

All currently enrolled DHHS providers will receive a letter giving them specific instructions for completing the "Currently Enrolled Provider" (CEP) NCTracks Registration. The letters will be mailed to providers in waves from March through May, 2013.

This letter provides:

- ❖ Directions for accessing the "Currently Enrolled Provider" NCTracks Registration webpage, and
- ❖ An access code the provider will use to verify their identity when logging into the application
- ❖ A North Carolina Identification (NCID) will also be required to complete the CEP process.

Providers can use this link to access additional CEP information:
https://www.nctracks.nc.gov/provider/providerEnrollment/assets/onlineHelp/cep_101_help.pdf access

NOTES:

2.5 NEW PROVIDERS

As new providers enroll in NCTracks, the Office Administrator completes their enrollment application. After the new provider is approved, the Office Administrator can then establish other users with security access to the Provider Portal.

NOTES:

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3.0 Creating New Groups

3.1 INTRODUCTION

An Office Administrator can be the Office Administrator for one or more NPIs. Users must define *<u>at least one</u>* Provider Group before adding Administrative Users.

Groups are created to represent logical collections of providers within an organization and can be organized by:

- Department
- Specialty
- Any other custom classification

An example of a group is a large organization, such as a hospital, that has several large departments or locations. Each group represents its own department and/or location. For example, if ABC Hospital has departments such as Urology, Endoscopy, and Pulmonology and locations such as New Bern Avenue, Smith Farm Road, and Falls of Neuse Road.

<u>Before</u> adding any Administrative Users, the user must define at least one Provider Group.

3.2 ACCESSING NCTRACKS

After accessing the NCTracks home page, follow the steps below to access the User Administration screens in the **Secure Provider Portal**.

Exhibit 2. NCTracks Home Page

Step	Action
1	Select the **Providers** tab.

The **Providers home page** displays.

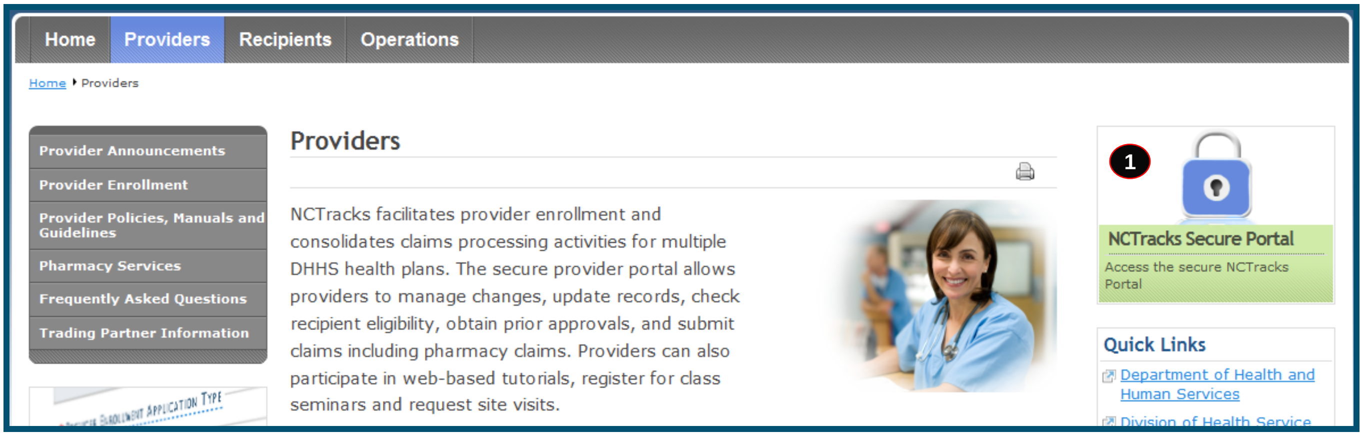

Exhibit 3. Providers Home Page

Step	Action
1.	Select the **NCTracks Secure Portal** icon.

The **Provider Portal Login** screen displays. **Note:** If a user does not have an NCID, he/she would click the NCID link to request one before continuing.

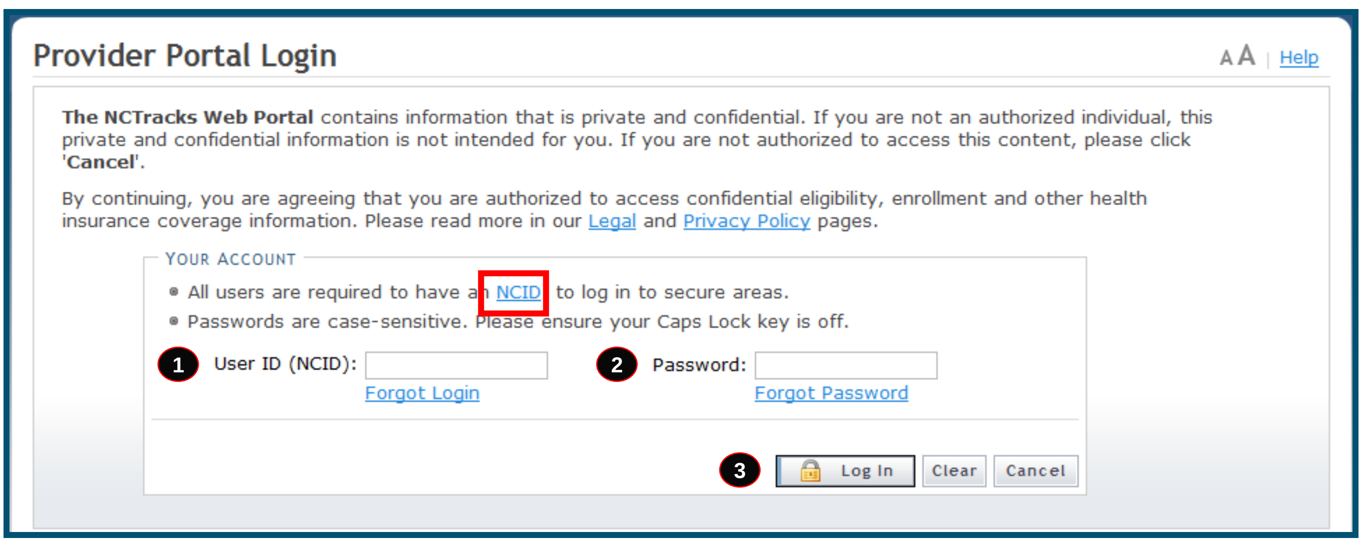

Exhibit 4. Provider Portal Login Screen

Step	Action
1.	User ID (NCID): Enter usersr **User ID (NCID)**.
2.	Password: Enter usersr password.
3.	Click the **Log In** button.

The **Secure Provider Portal** home page displays.

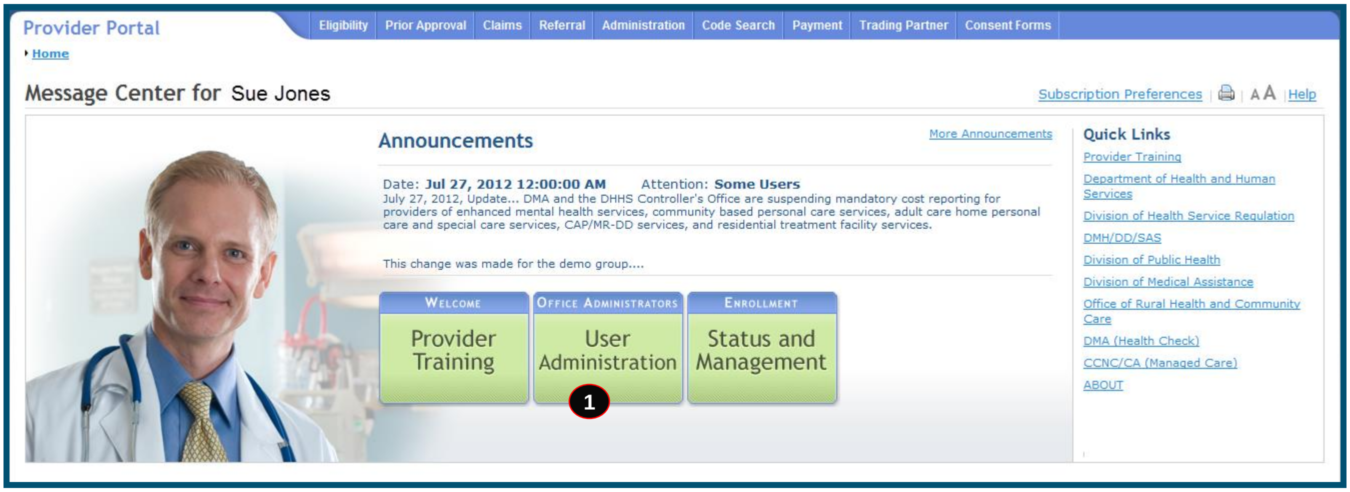

Exhibit 5. Secure Provider Portal

Step	Action
1.	On the **Secure Provider Portal** home page, select **Office Administrators/User Administration**.

NOTES:

3.3 ACCESSING THE USER ADMINISTRATION SCREENS IN THE SECURE PROVIDER PORTAL

The **User Administration** screen displays. From the User Administration menu, the user can access:

- New Group Setup
- New User Setup
- Group Maintenance
- User Maintenance

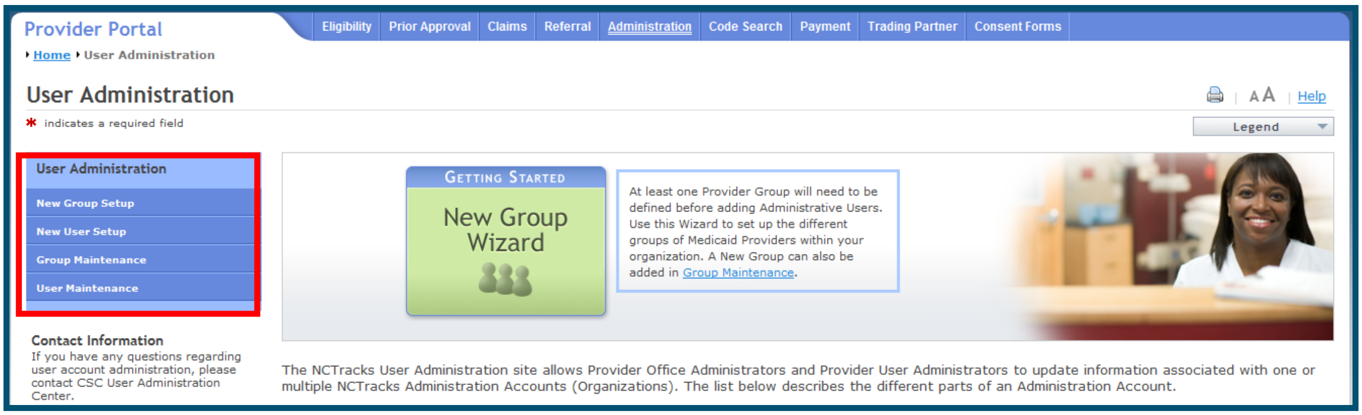

Exhibit 6. User Administration Menu

NOTES:

3.4 NEW GROUP SETUP SCREEN

Office Administrators use the New Group Setup process to set up Provider Groups for Administrative Users to represent. As mentioned, they should create groups that represent logical collections of providers within an organization. Administrative Users are assigned to do business for one or more of these groups.

From the **User Administration** screen, the user can access the **New Group Setup** screen in several ways:

- Selecting **New Group Setup** from the Administration tab
- Selecting the Getting Started/New Group Wizard icon
- Selecting **New Group Setup** in the User Administration menu on the left side of the home page

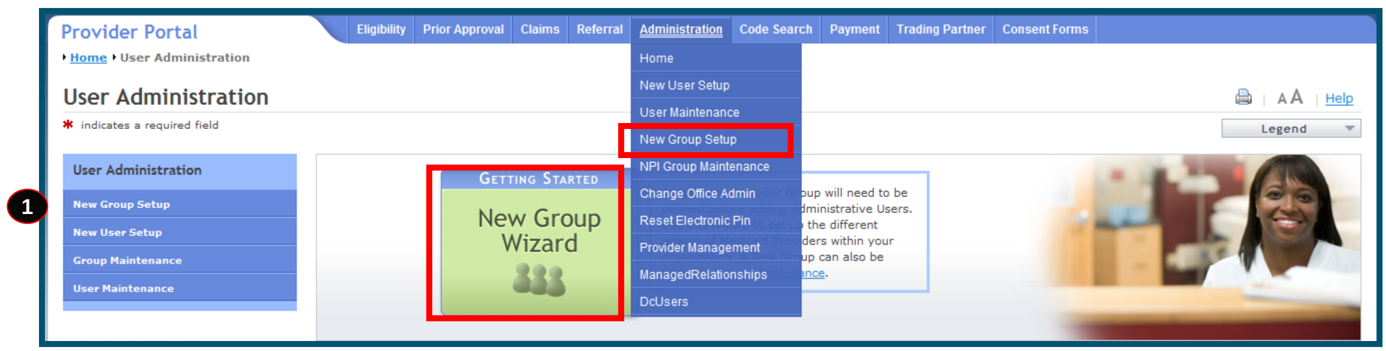

Exhibit 7. User Administration Screen

Step	Action
1	In the **User Administration** menu, select **New Group Setup**.

NOTES:

3.4.1 New Group Setup Screen – Step 1 of 2

The **New Group Setup** screen is where the user begins setting up New Groups. In the **Step 1 of 2 – Create New Provider Group Name** section, the user enters the group name and description.

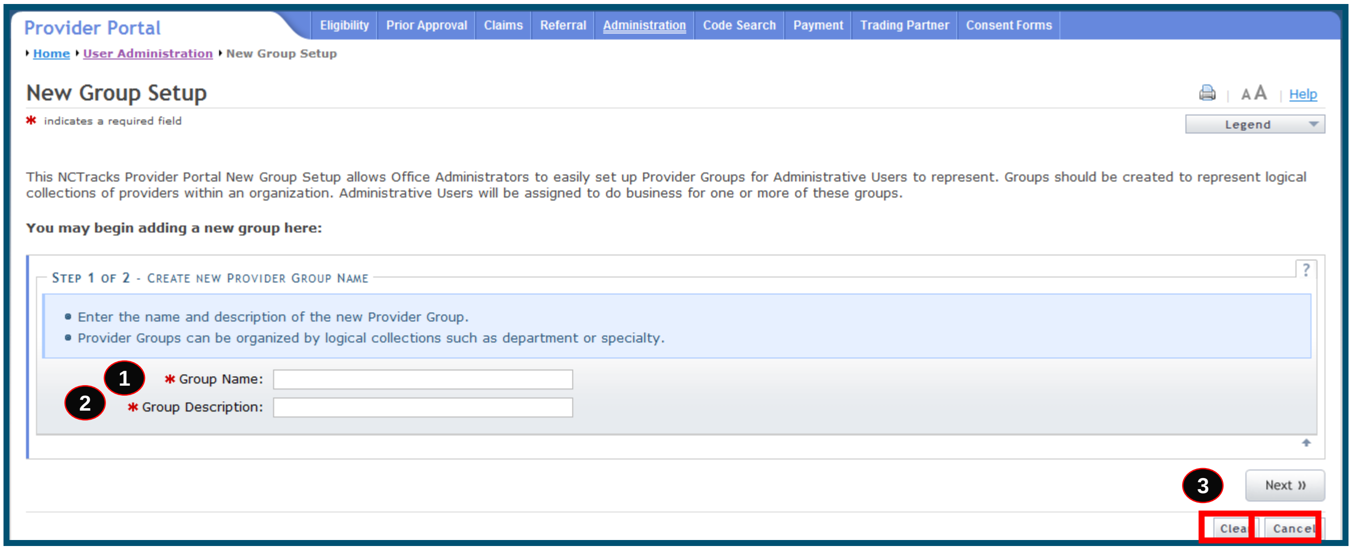

Exhibit 8. New Group Setup Screen: Step 1 of 2

Step	Action
1.	Group Name: Enter the **name** of the new provider group.
2.	Group Description: Enter the **description** of the new provider group.
3.	Click **Next** button to continue to the second setup screen. **Note:** If necessary, click the Clear button to erase the entries or click the Cancel button to cancel all entries and return to the previous screen.

NOTES:

3.4.2 New Group Setup Screen – Step 2 of 2

In the **Step 2 of 2 – Assign NPIs to Provider Group** section, the Office Administrator selects NPIs from the Available NPIs section and assigns them to the group. The Available NPIs are NPIs associated with the Office Administrator's accounts in NCTracks via enrollment, re-enrollment, currently enrolled provider NCTracks registration, etc.

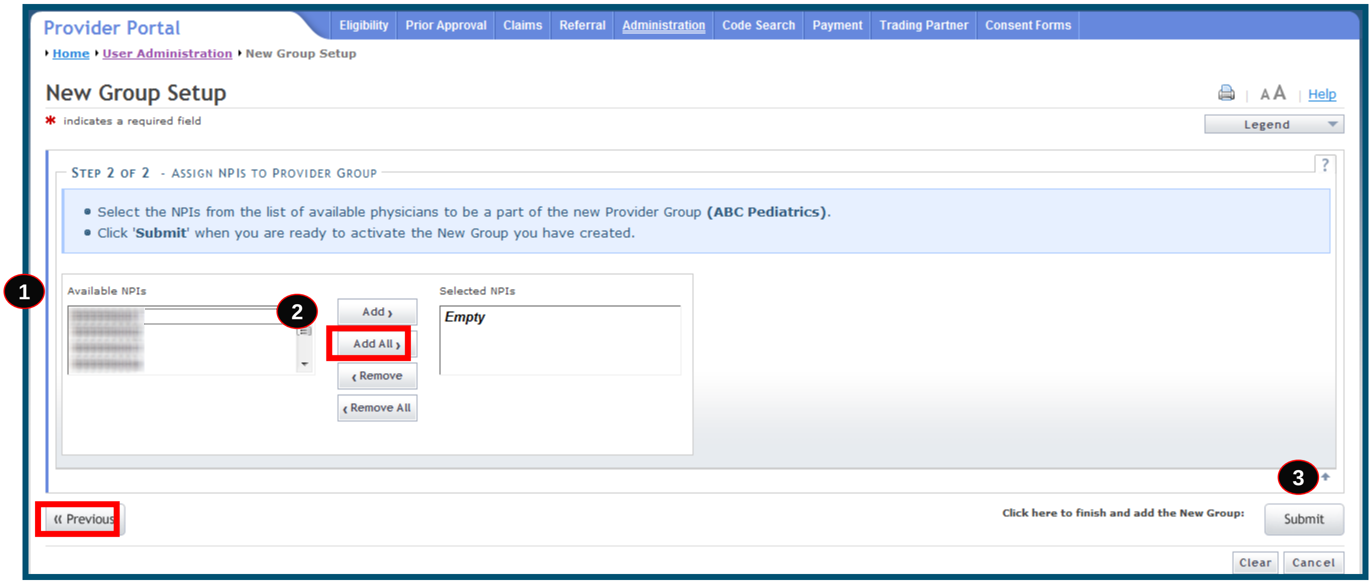

Exhibit 9. New Group Setup Screen: Step 2 of 2

Step	Action
1	Available NPIs: Select the appropriate **NPI(s)**.
2	Click the **Add** button to add it to the **Selected NPIs** section. • To choose more than one NPI at a time, users would select the appropriate **NPIs** while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the NPIs listed in the **Available NPIs** section, users would click the **Add All** button. **Note:** If necessary, users would click the Previous button to return to the previous screen.
3	Click the **Submit** button.

NOTES:

3.5 SUBMISSION CONFIRMATION SCREEN

After clicking the Submit button, the **Submission Confirmation** screen displays. The name of the new Group the user added displays to the right of the green check mark.

Other functions are also available on this screen. Notice that users can conduct a search in the **Search Criteria** section or add a new group in the **New Group** section.

To return to the **User Administration** screen, click User Administration in the breadcrumb trail.

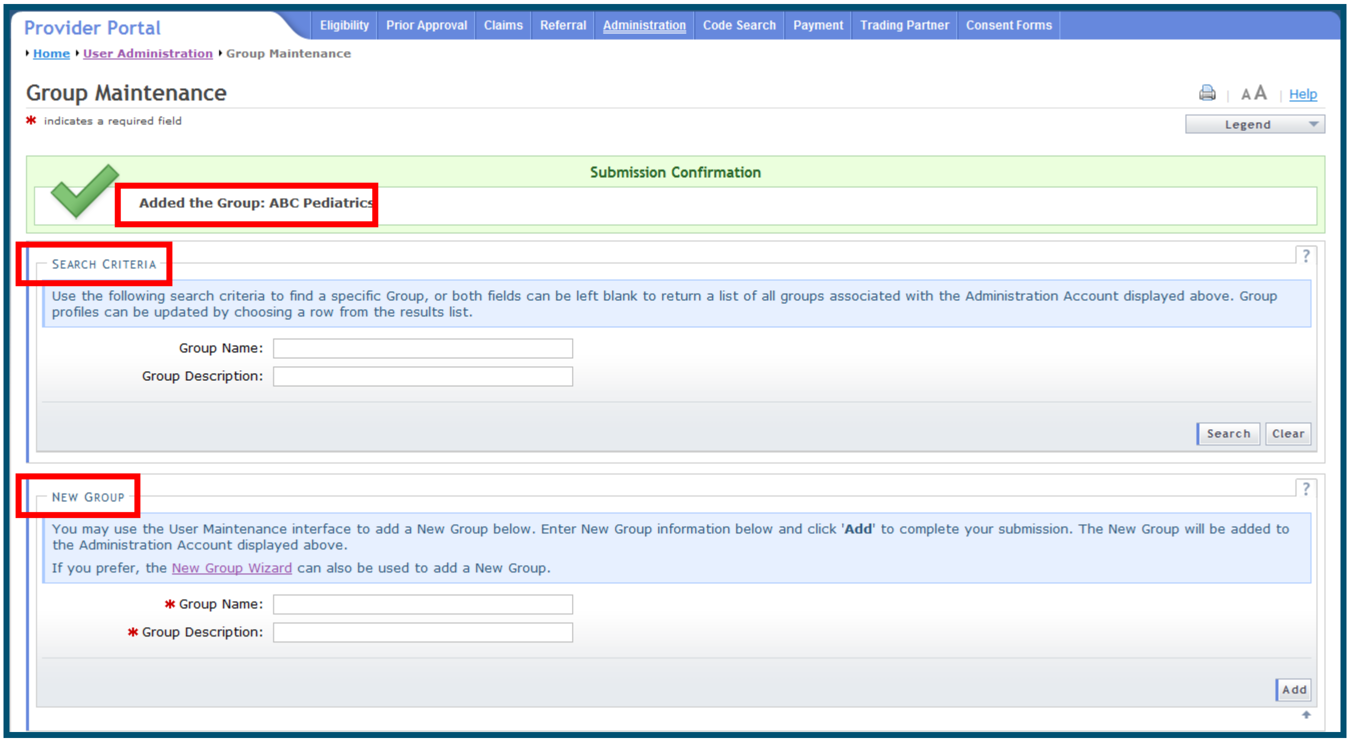

Exhibit 10. Submission Confirmation Screen

NOTES:

4.0 Group Maintenance

4.1 INTRODUCTION

On the **User Administration** screen, Office Administrators can use the Group Maintenance link to access the **Group Maintenance** screen and then update NPIs/Atypical IDs for an existing group (or add a new group).

4.2 USER ADMINISTRATION SCREEN

From the User Administration screen, the user accesses the **Group Maintenance** screen.

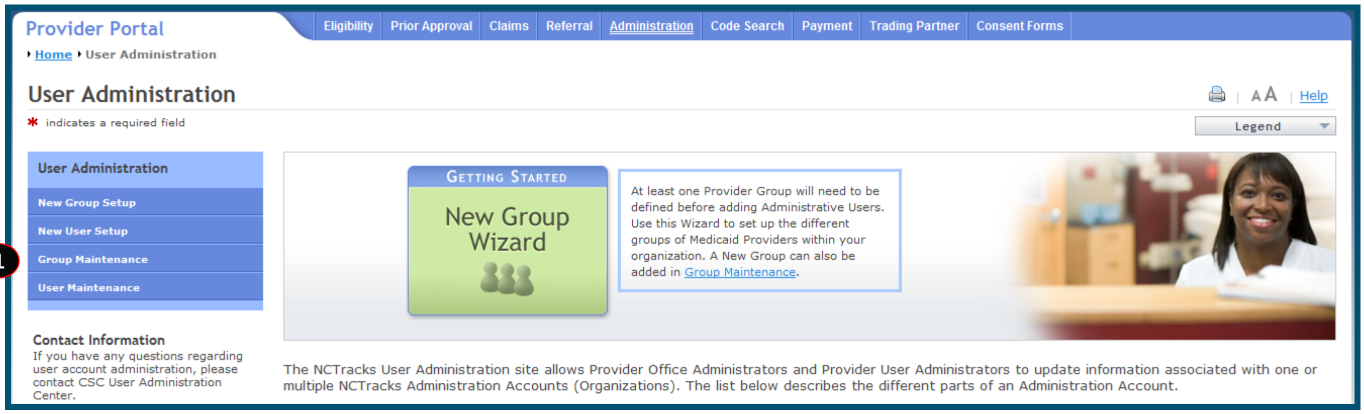

Exhibit 11. User Administration Screen

Step	Action
1	In the **User Administration** menu, select **Group Maintenance**.

NOTES:

4.3 GROUP MAINTENANCE SCREEN

The **Group Maintenance** screen displays. This is where users begin searching for the group(s) they need to edit.

4.3.1 Group Maintenance Screen – Search Criteria

On the **Group Maintenance** screen, specify the Group Name or Group Description to locate a specific group. If a user leaves both fields blank, a list of all groups associated with the user (as the Office Administrator) display. A user can also search by typing a portion of the name in the Group Name field; all matching results will display.

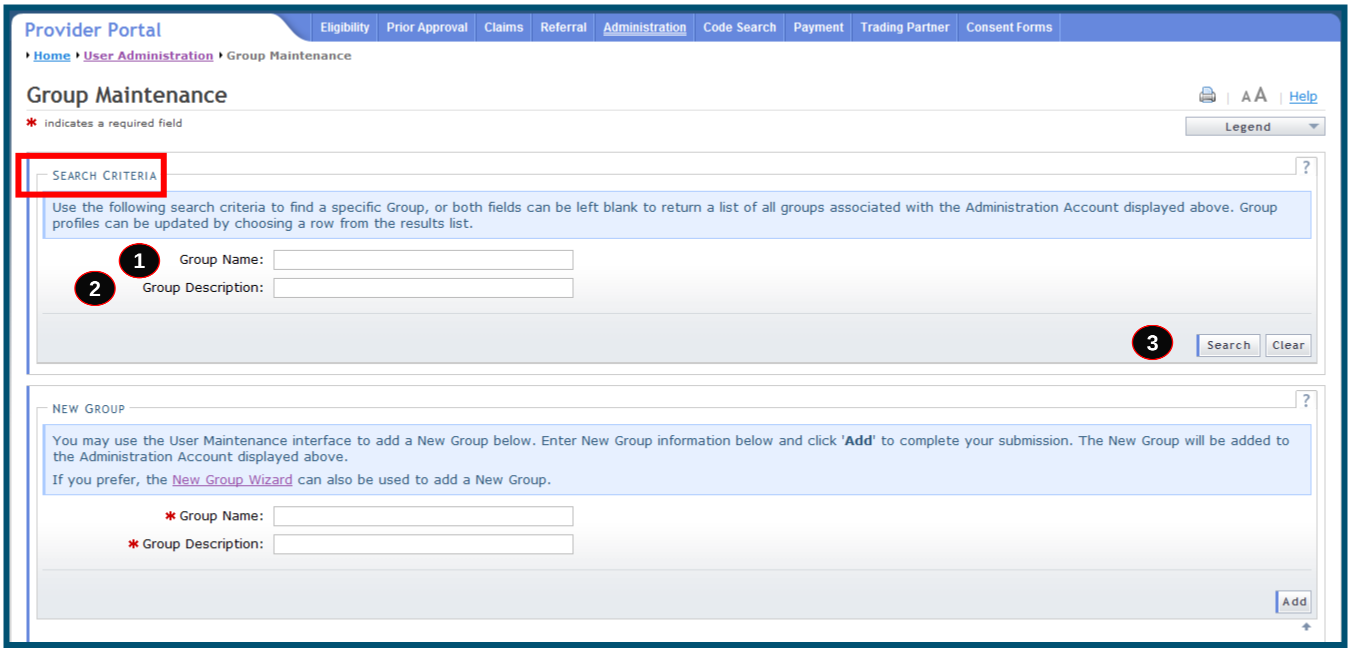

Exhibit 12. Group Maintenance Screen: Search Criteria

Step	Action
1	Group Name: Enter the **group name**.
2	Group Description: Enter the **group description**.
3	Click the **Search** button.

NOTES:

4.3.2 Group Maintenance Screen – Search Results

The results display in the **Search Results** section of the screen. If a user searches by typing a portion of the name, all matching results display.

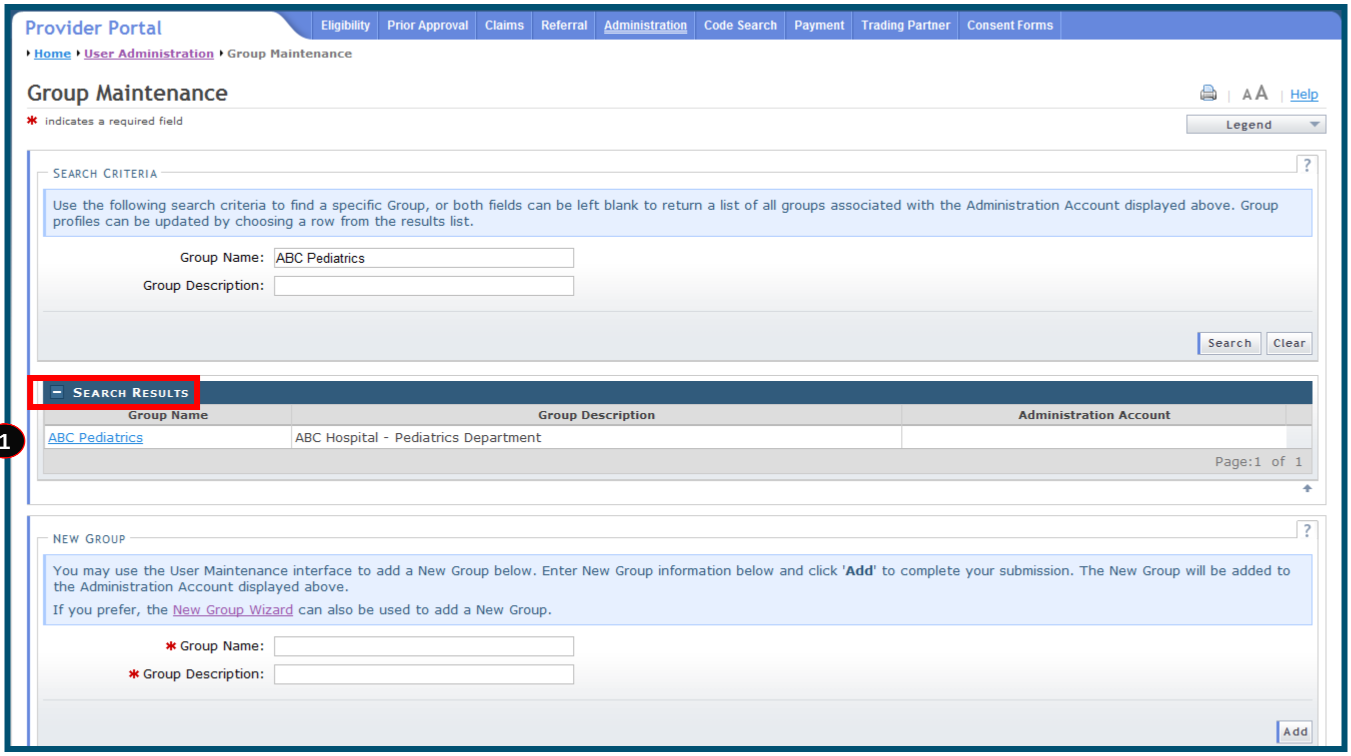

Exhibit 13. Group Maintenance Screen: Search Results

Step	Action
1	In the **Group Name** column, click the appropriate group **link**.

NOTES:

4.3.3 Group Maintenance Screen – Add/Remove NPIs

Both the Group Name and Group Description display under the Add/Remove NPIs heading. The user should review the name and group to ensure they are making edits to the correct group. If not, they should click the Cancel button to return to the previous screen and initiate another search.

Note that the currently selected NPIs for this group display in the **Selected NPIs** section.

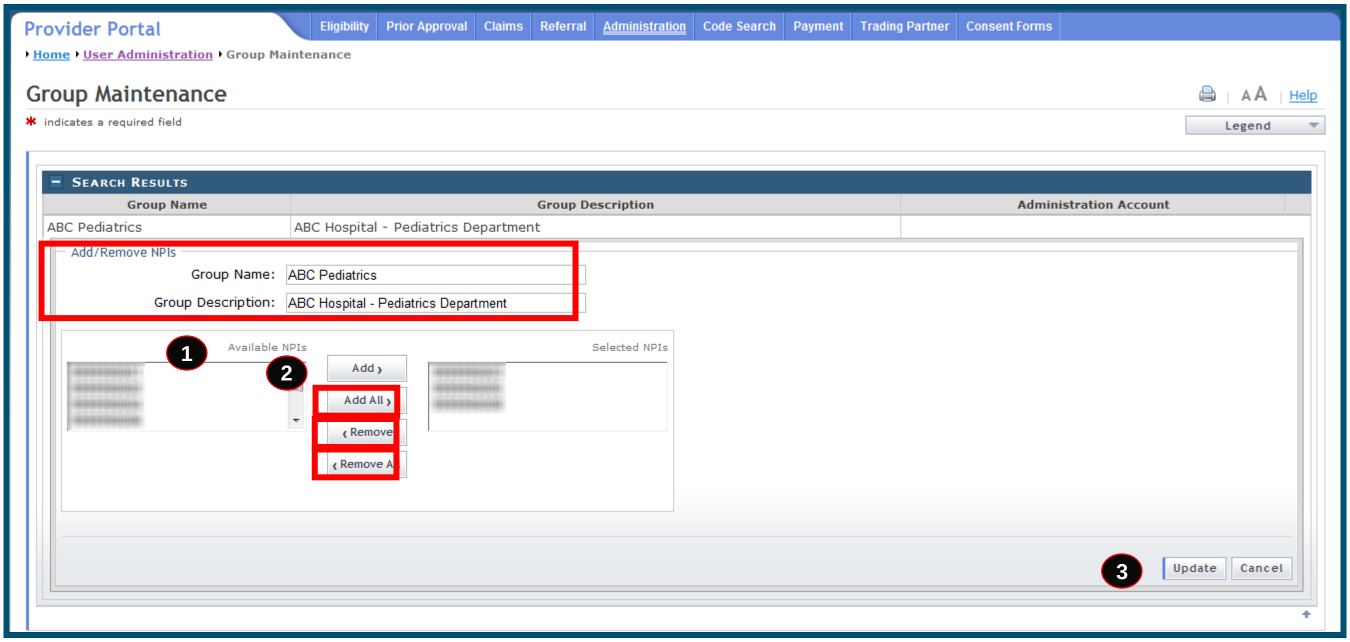

Exhibit 14. Group Maintenance Screen: Add/Remove NPIs

Step	Action
1	Available NPIs: Select the appropriate **NPI(s)**.
2	Click the **Add** button to add it to the **Selected NPIs** section. • To choose more than one NPI at a time, users would select the appropriate **NPIs** while holding down the **<CTRL>** key. Then, users would click the **Add** button. • To add all the NPIs listed in the **Available NPIs** section, users would click the **Add All** button. To remove an NPI: • Select the appropriate **NPI** and users would click the **Remove** button to remove it from the **Selected NPIs** section. • To choose more than one NPI at a time, users would select the appropriate **NPIs** while holding down the **<CTRL>** key. Then, users would click the **Remove** button. • To remove all the NPIs listed in the **Available NPIs** section, users would click the **Remove All** button.
3	Click the **Update** button.

4.4 SUBMISSION CONFIRMATION SCREEN

After clicking the Update button, the **Submission Confirmation** screen displays. The name of the updated Group displays to the right of the green check mark. If necessary, users can conduct another group search from this screen.

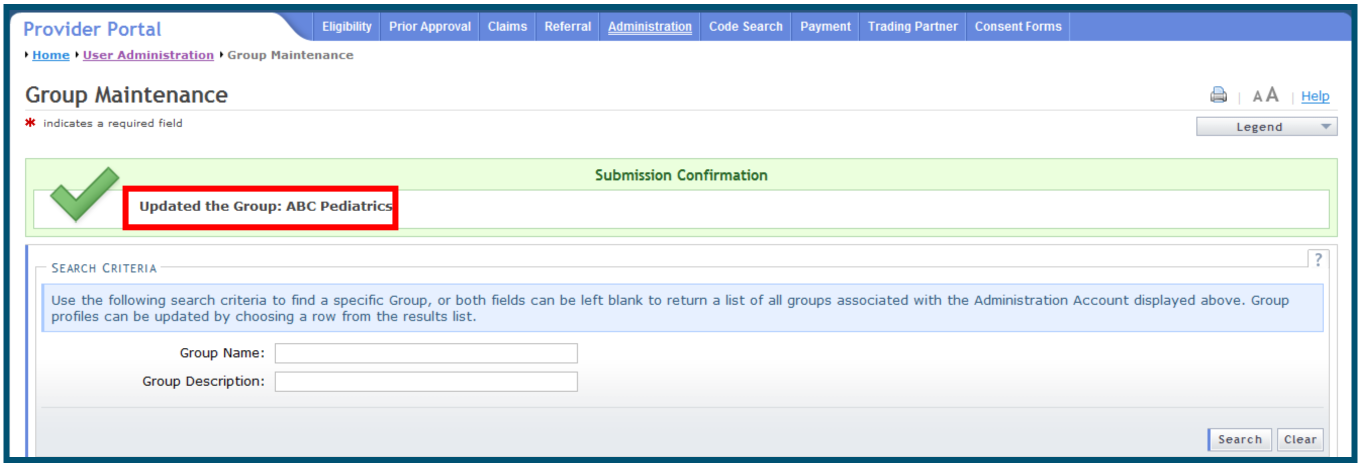

Exhibit 15. Submission Confirmation Screen

NOTES:

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5.1 INTRODUCTION

There are three types of users:

- ❖ Office Administrators
- ❖ User Administrators
- ❖ General Users

Office Administrators:

- ❖ Can add, maintain, and delete User Administrators and General Users
- ❖ Can add and edit User Groups

User Administrators:

- ❖ Can add, maintain, and delete General Users

It is highly suggested that each Office Administrator add at least one User Administrator because the User Administrator can serve as a backup in case the Office Administrator is unavailable.

General Users:

- ❖ Can be assigned roles for the duties they have access to perform

The process for creating new General Users or User Administrators is very similar to that for creating new groups.

5.2 ADDING A NEW USER WITHOUT A PIN

From the **User Administration** screen, access the **New User Setup** screen by:

- ❖ Selecting New User Setup from the **Administration** tab, or
- ❖ Selecting New User Setup in the **User Administration** menu

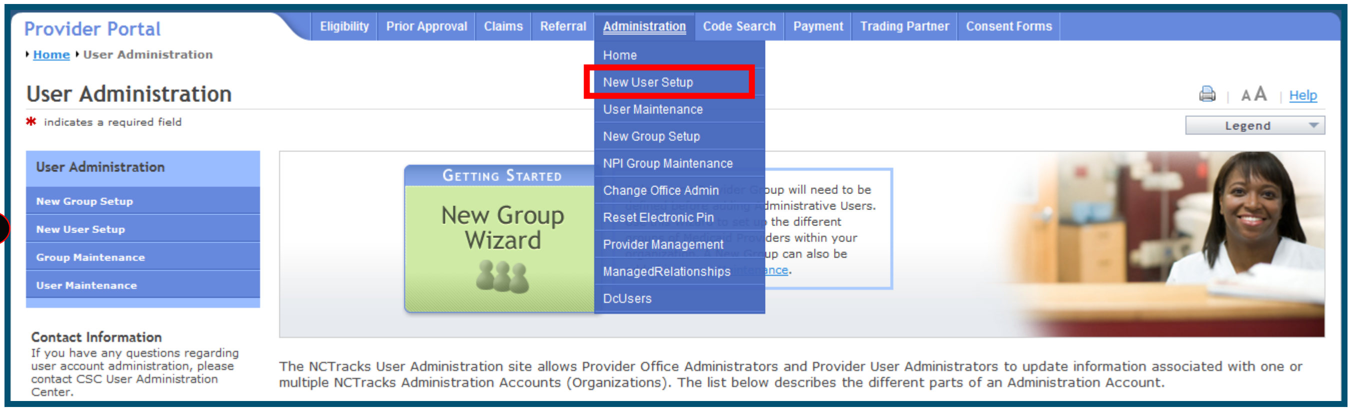

Exhibit 16. User Administration Screen

Step	Action
1	In the **User Administration** menu, select **New User Setup**.

5.3 NEW USER SETUP SCREEN

We'll begin on the **New User Setup** screen.

5.3.1 New User Setup Screen – Step 1 of 4

In the **Step 1 of 4 – Create a New User** section, answer the question: Is the New User an owner, or do they have a managing relationship with the Administration Account NPI?.

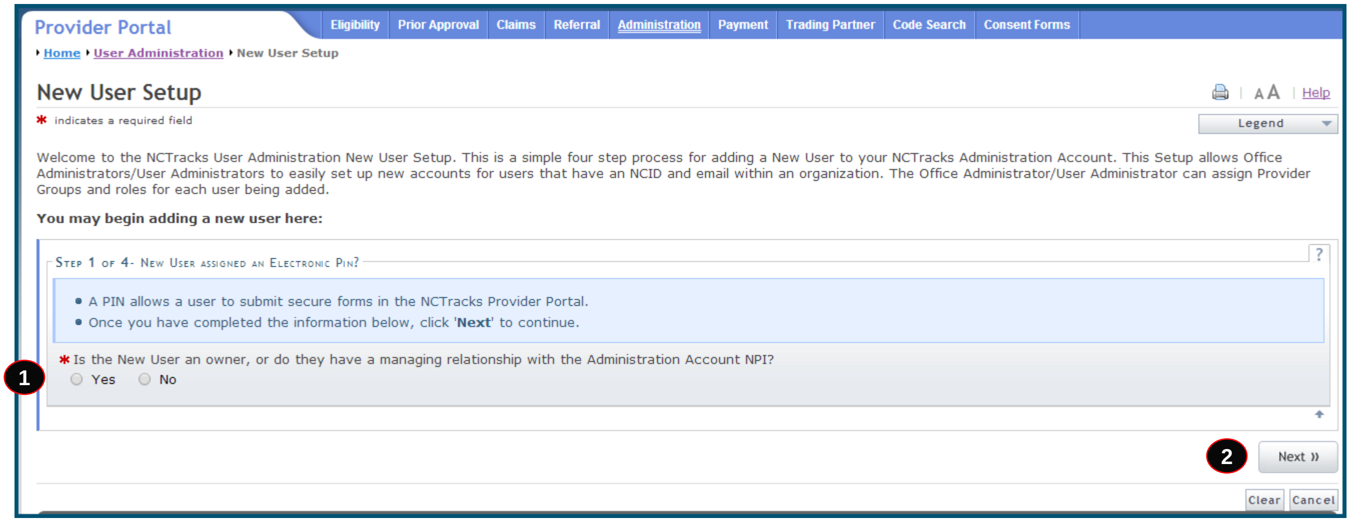

Exhibit 17. New User Setup Screen (1 of 4)

Step	Action
1	Click the bubble for the appropriate answer. Yes No
2	Click the **Next** button.

5.3.1 New User Setup Screen – Step 2 of 4

In the **Step 2 of 4 – Create a New User** section, enter as much information as known. Red asterisks identify all required fields.

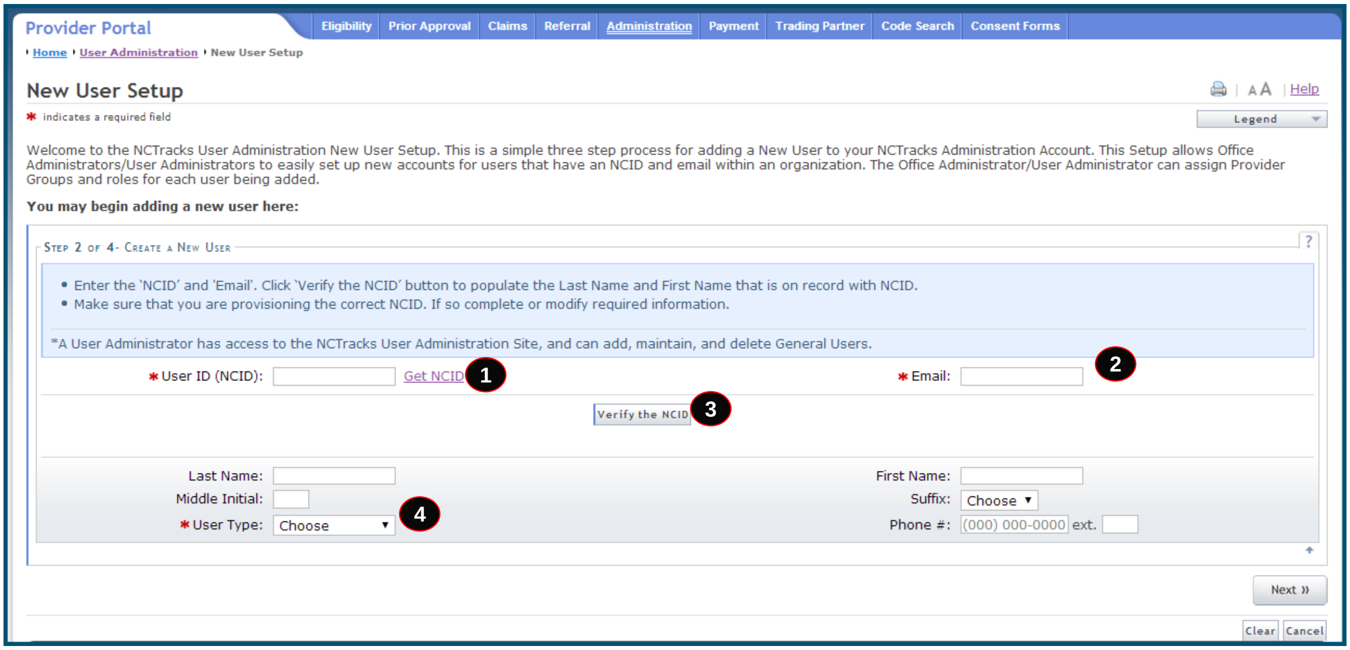

Exhibit 18. New User Setup Screen: Step 2 of 4

Step	Action
1	Enter the new user's **NCID**.
2	Enter the **Email** address.
3	Click **Validate** button. The Last Name and First Name fields will pre-fill from the NCID website. **Note:** Users may edit the fields on the screen, but this will not update the information users have on file with NCID.
4	Select the **type** from the drop-down list. General User User Administrator
5	Click the **Next** button.

5.3.2 New User Setup Screen – Step 3 of 4

In the **Step 3 of 4 – Assign Provider Groups to the New User** section, select the provider groups for the New User.

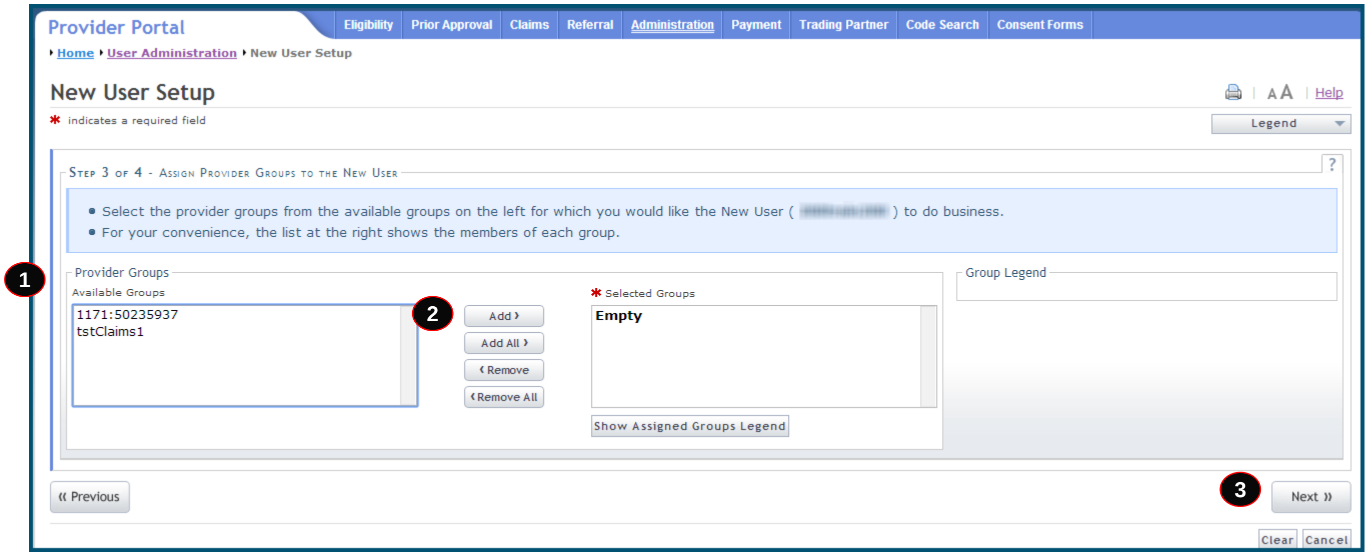

Exhibit 19. New User Setup Screen: Step 3 of 4

Step	Action
1.	Available Groups: Select the appropriate **group(s)**.
2.	Click **Add** button to it to the **Selected Groups** section. • To choose more than one group at a time, users would select the appropriate groups while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the groups listed in the **Available Groups** section, users would click the **Add All** button.
3.	Click the **Next** button.

5.3.3 New User Setup Screen – Step 4 of 4

In the **Step 4 of 4 – Assign Access Roles to the New User** section, select the access roles for the New User from the **Available Roles** section. The user's role(s) define which parts of the NCTracks Provider Portal the user can access.

The user's roles and descriptions are:

- CAQH CORE – 270 Batch
- CAQH CORE – 270 Realtime
- CAQH CORE – 276 Batch
- CAQH CORE – 276 Realtime
- Check Recipient Eligibility – can check and submit recipient eligibility
- Eligibility – can inquire about user eligibility
- Claims – can verify patient and search for claim status

- Claims Batch – can batch claims
- Claims Submit – can submit claims
- Eligibility Batch – can batch results
- Prior Approval Submit – can submit a Prior Approval
- Prior Approvals – can request inquiry and approval status
- Referrals – can submit a referral
- Remittance – is a remittance user
- Supervisor Access – has access to all roles
- Training – has training access
- User Administrator – can perform user maintenance

Select the role(s) the user needs to perform his/her job.

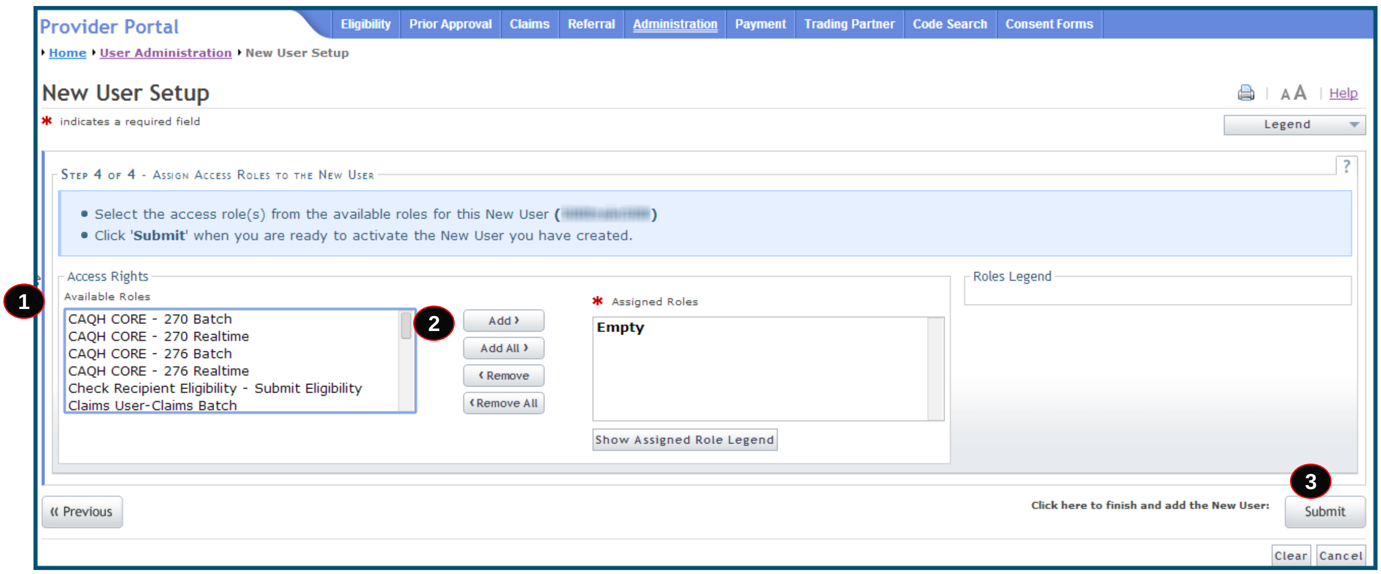

Exhibit 20. New User Setup Screen: Step 4 of 4

Step	Action
1	Select the appropriate **Available Role(s)**
2	Click the **Add** button to add it to the **Assigned Roles** section. • To choose more than one role at a time, users would select the appropriate roles while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the roles listed in the **Available Roles** section, users would click the **Add All** button.
3	Click the **Submit** button. The Added User message will display.

5.4 Submission Confirmation Screen

After clicking the Submit button, the **Submission Confirmation** screen displays. The name of the new General User (User NCID) displays to the right of the green check mark.

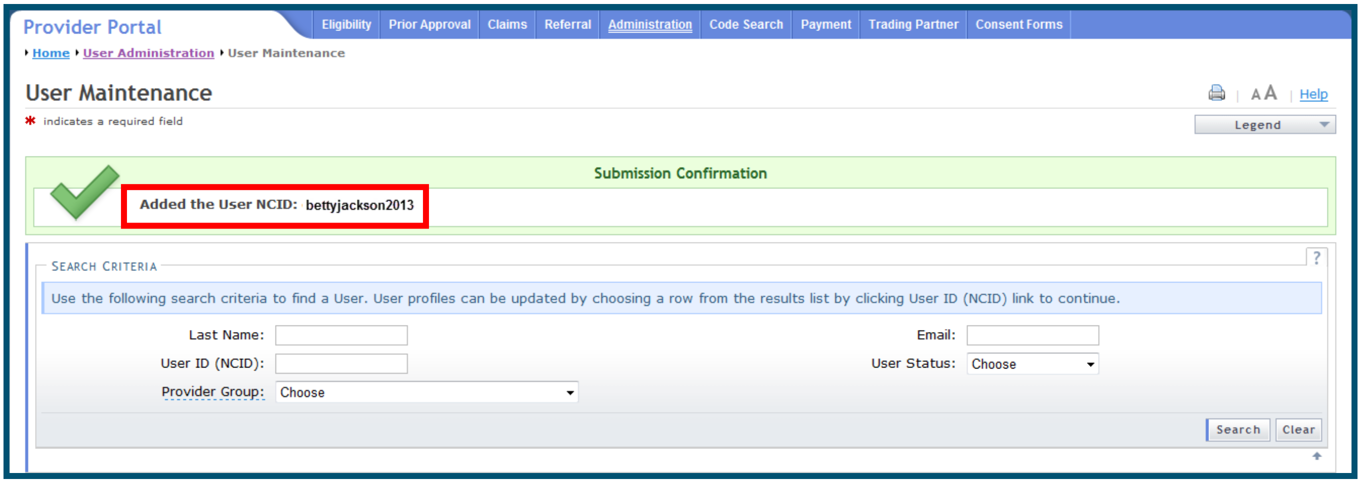

Exhibit 21. Submission Confirmation Screen

NOTES:

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6.0 Creating New User with PIN

6.1 INTRODUCTION

All owners and managing employees for a provider can have access to update a provider's information (See Provider Applications Instructor-led training) for more information about the Manage Change Request application).

If an owner or managing employee wishes to become a user, he/she will be sent an Electronic Signature PIN to the email address on file so he/she can electronically sign the applications. Having a PIN allows a user to submit secure forms in the NCTracks Provider Portal.

6.2 ADDING A NEW USER WITH PIN

From the **User Administration** menu, select New User Setup.

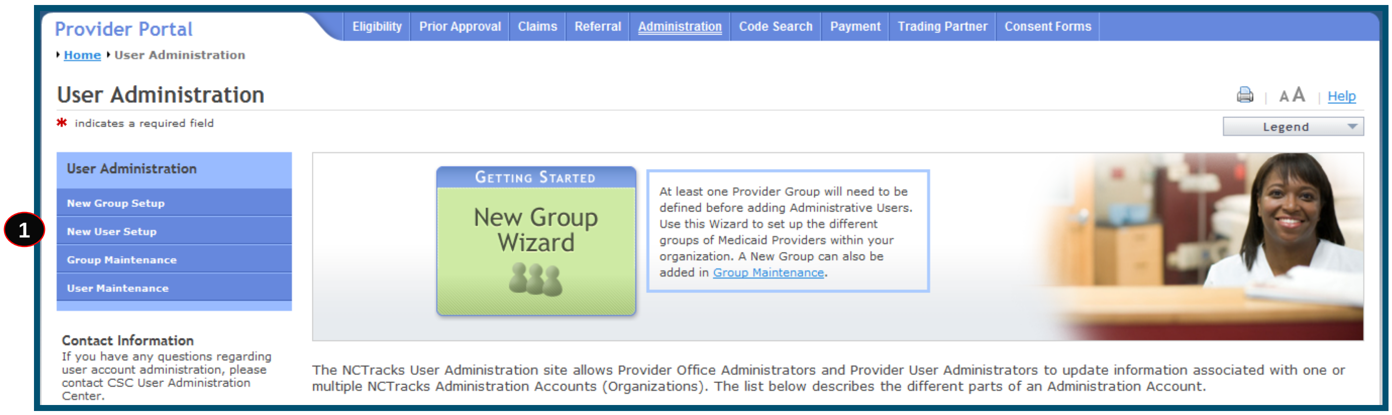

Exhibit 22. User Administration Screen

Step	Action
1	In the **User Administration** menu, select **New User Setup**.

NOTES:

6.3 NEW USER SETUP SCREEN

Adding a New User (who has a PIN) is a four-step process.

6.3.1 New User Setup Screen – Step 1 of 4

On this screen, users will answer the “Is the New User an owner, or do they have a managing relationship with the Administration Account NPI?” question. Notice how this screen does not display when setting up a user without a PIN.

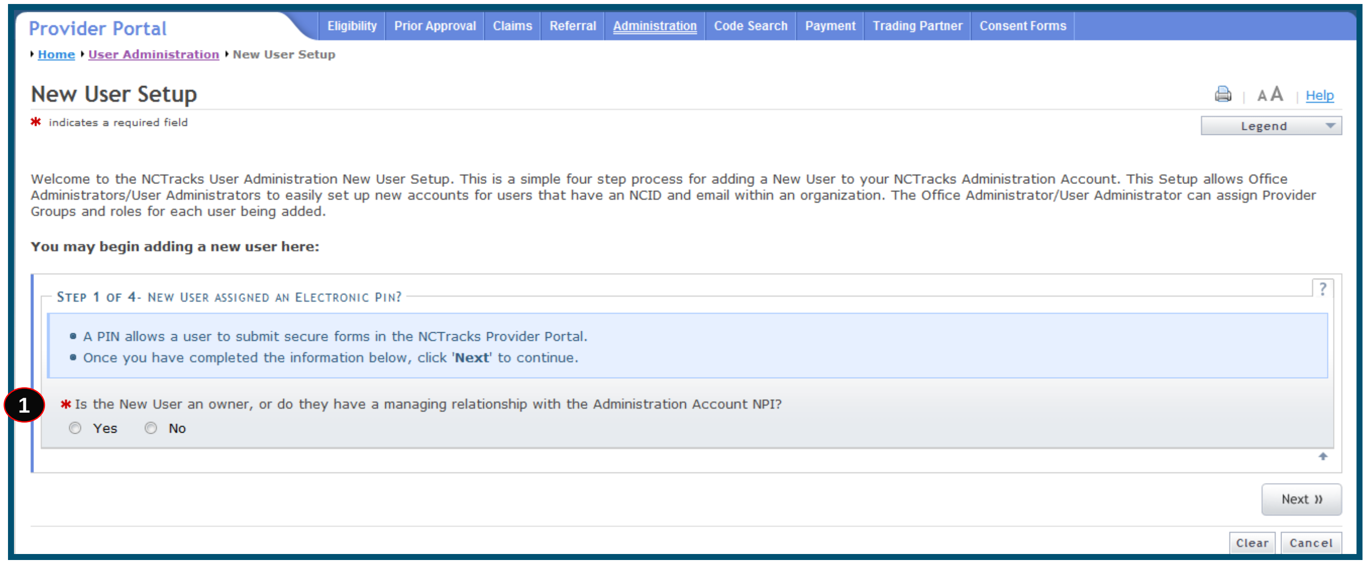

Exhibit 23. New User Setup Screen: Step 1 of 4

Step	Action
1.	“Is the New User an owner, or do they have a managing relationship with the Administration Account NPI?” Click the **Yes** radio button. **Note:** If the user is not an owner or does not have a managing relationship with the Administration Account NPI, users would click the **No** radio button.

After selecting the Yes radio button, the section expands as shown below:

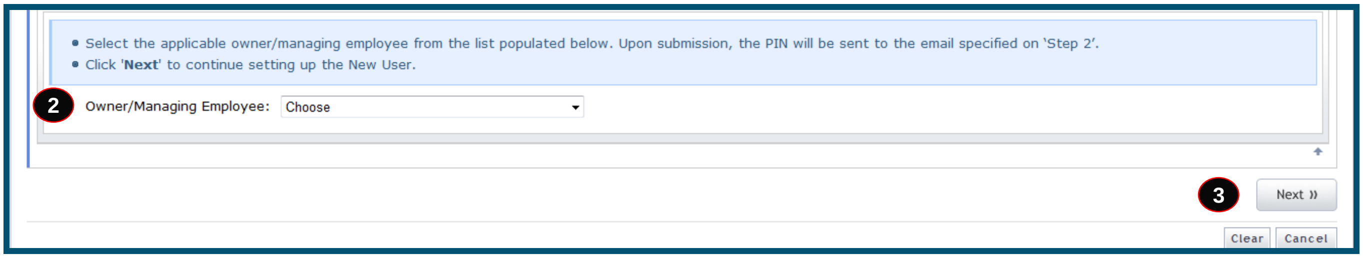

Exhibit 24. New User Setup Screen: Owner/Managing Employee

Step	Action
2.	Owner/Managing Employee: Select the appropriate **employee name** from the drop-down list.
3.	Click the **Next** button.

Note: The screen in Exhibit 24 would display when a User Administrator is a User Administrator for *more than one* Office Administrator. They would select the appropriate Office Administrator from the drop-down list.

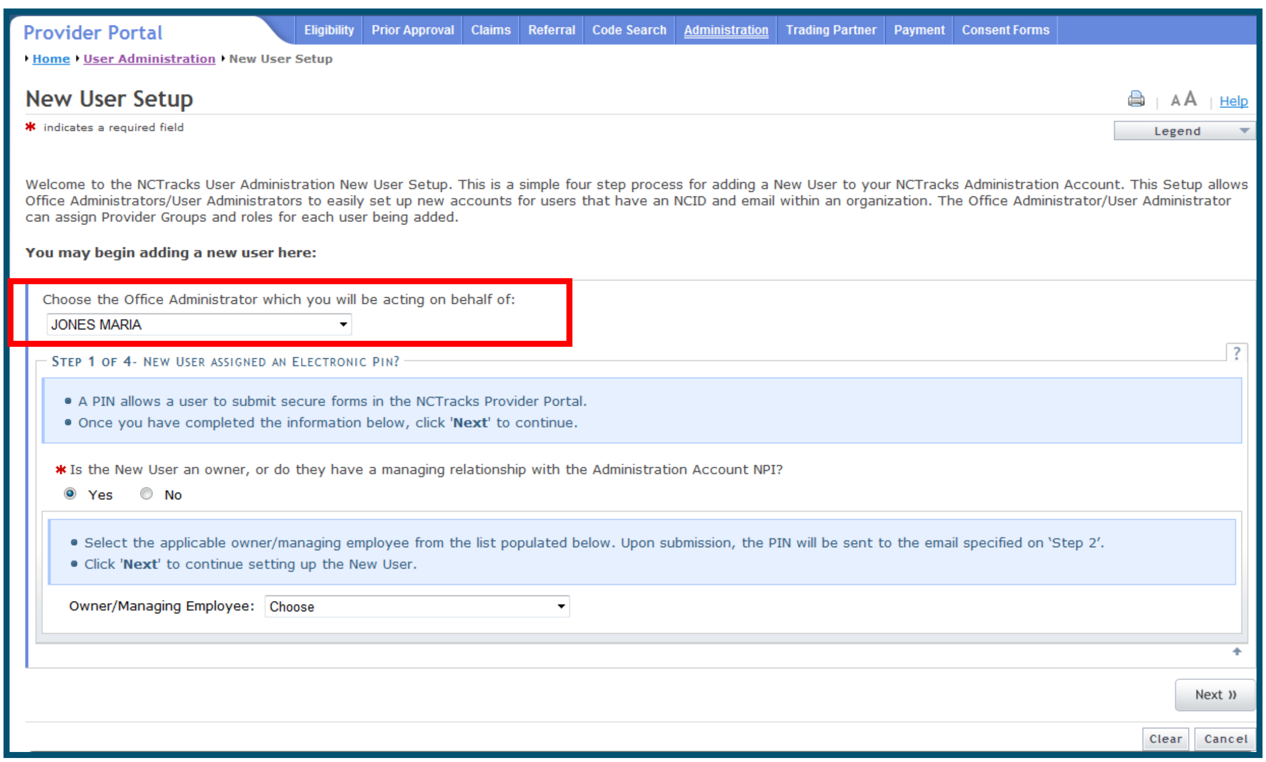

Exhibit 25. New User Setup Screen: Step 1 of 4 (Multiple Office Administrators)

6.3.2 New User Setup Screen – Step 2 of 4

Complete the **Step 2 of 4 – Create a New User** section. Users may edit the fields, but note that editing the fields here does NOT update the information users have on file with NCID.

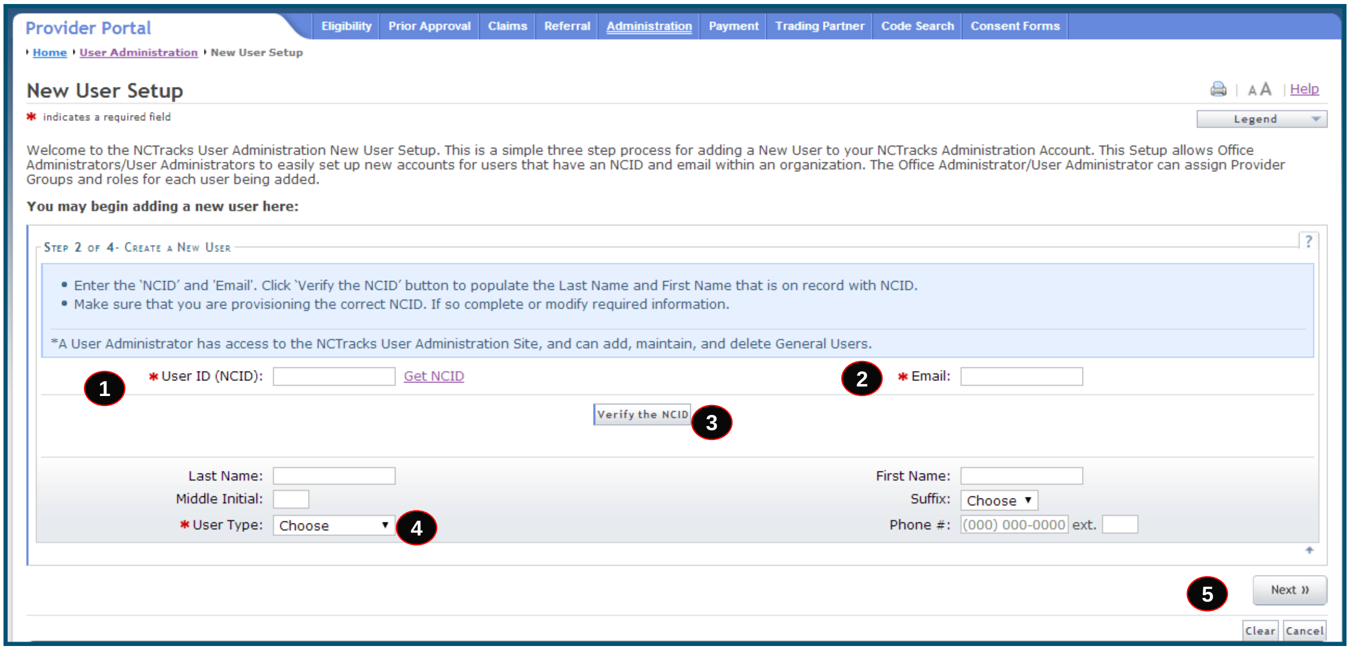

Exhibit 26. New User Setup Screen: Step 2 of 4

Step	Action
1	Enter the new user's **NCID**.
2	Enter the **Email** address.
3	Click **Validate** button. The Last Name and First Name fields will pre-fill from the NCID website. **Note:** Users may edit the fields on the screen, but this will not update the information users have on file with NCID.
4	Select the **type** from the drop-down list. General User User Administrator
5	Click the **Next** button.

6.3.3 New User Setup Screen – Step 3 of 4

In the **Step 3 of 4 – Assign Provider Groups to the New User** section, select the provider groups for which users want the new User Administrator to do business.

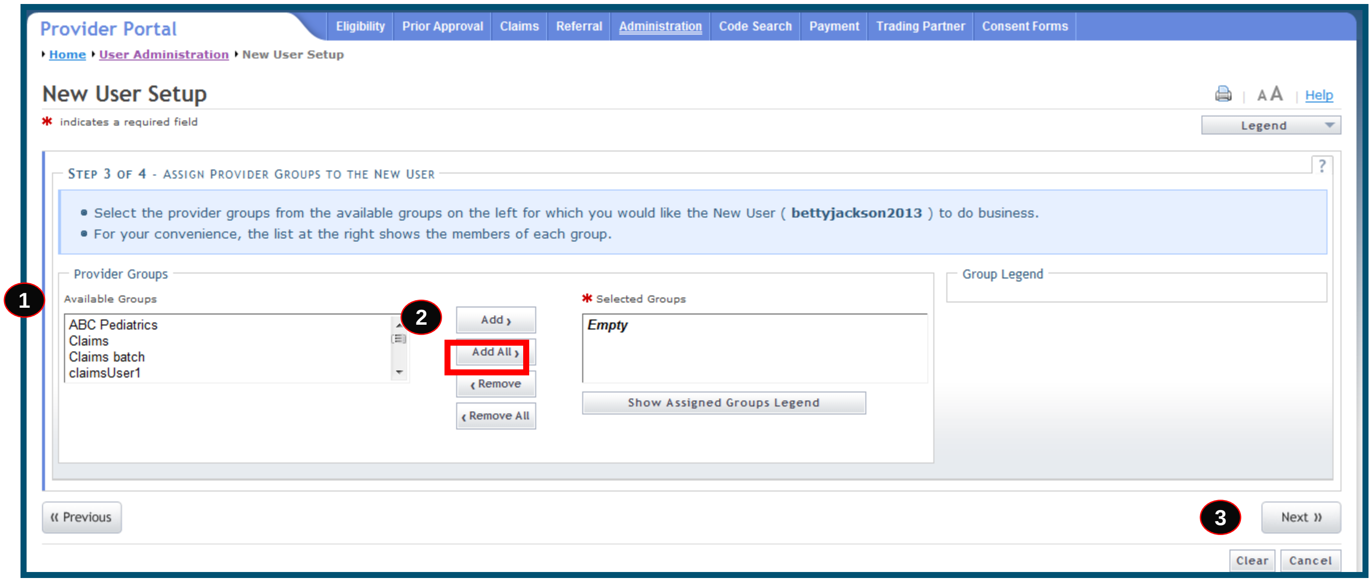

Exhibit 27. New User Setup Screen: Step 3 of 4

Step	Action
1	Available Groups: Select the appropriate **group(s)**
2	Click the **Add** button to add it to the **Selected Groups** section. • To choose more than one group at a time, users would select the appropriate groups while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the groups listed in the **Available Groups** section, users would click the **Add All** button. • **Note:** After selecting the groups, users can click the **Show Assigned Groups** button to display the members in each selected group.
3	Click the **Next** button.

NOTES:

6.3.4 New User Setup Screen – Step 4 of 4

In the **Step 4 of 4 – Assign Access Roles to the New User** section, select the Access Rights/Roles for the User Administrator. Remember that access roles provide access to the NCTracks sections required for users to do their job.

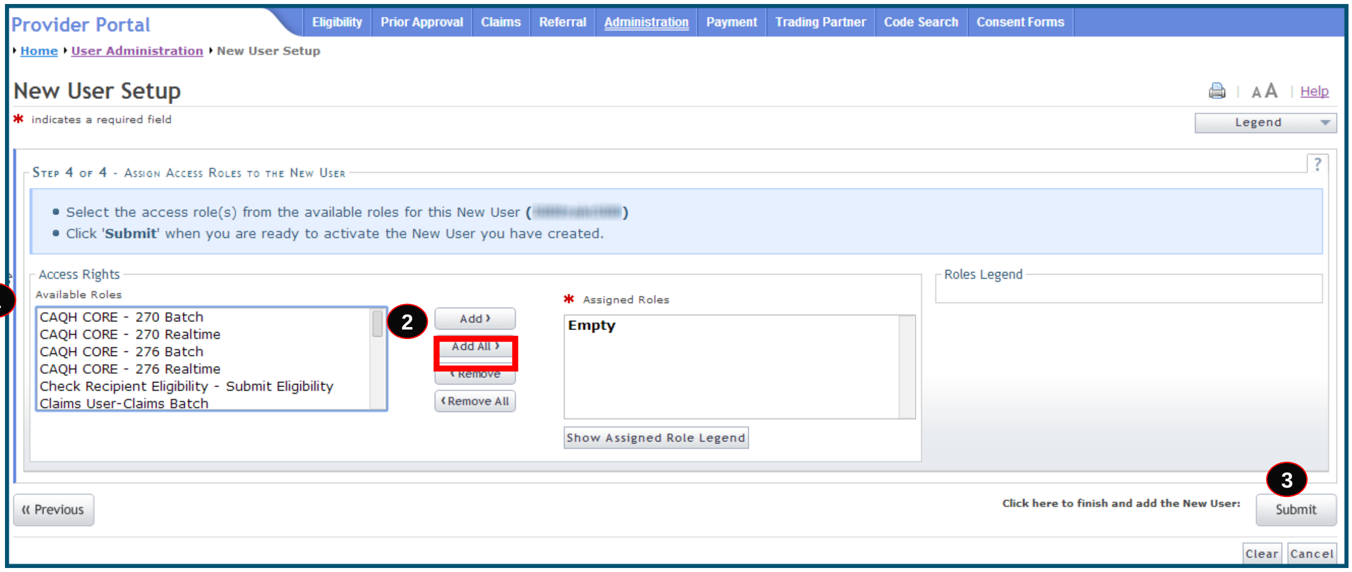

Exhibit 28. New User Setup Screen: Step 4 of 4

Step	Action
1	Select the appropriate **Available Role(s)**.
2	Click the **Add** button to add it to the **Assigned Roles** section. • To choose more than one role at a time, users would select the appropriate roles while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the roles listed in the **Available Roles** section, users would click the **Add All** button.
3	Click the **Submit** button.

Exhibit 28 shows an example of the Roles Legend, which displays after clicking the Show Assigned Role Legend button. In this example, the assigned roles for this user are Check Recipient Eligibility, Claims Submit, and User Admin.

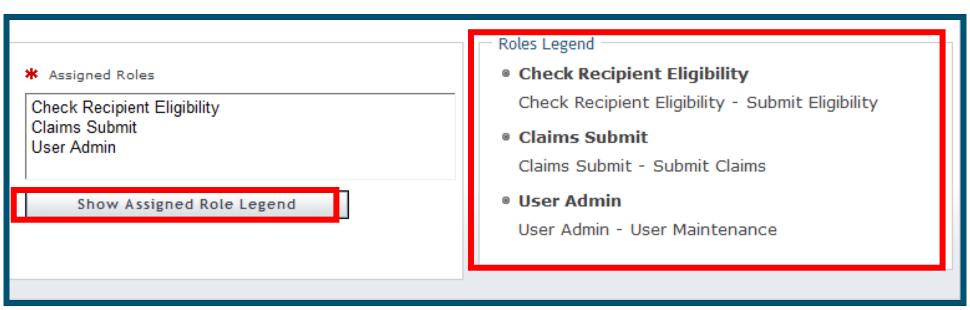

Exhibit 29. Roles Legend

6.4 SUBMISSION CONFIRMATION SCREEN

After clicking the Submit button, the **Submission Confirmation** screen displays. The name of the new User Administrator (User NCID) displays to the right of the green check mark.

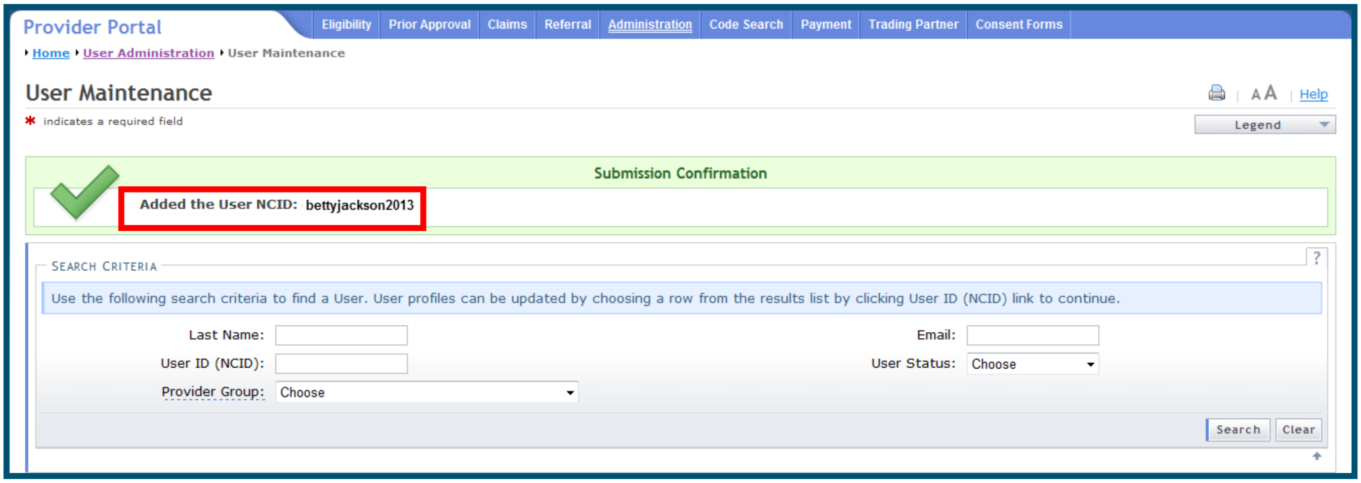

Exhibit 30. Submission Confirmation Screen

NOTES:

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7.1 INTRODUCTION

Use the User Maintenance function to make updates to users and user information.

7.2 ACCESS USER MAINTENANCE

On the **User Administration** screen, use the User Maintenance link to update the Security Rights, Provider Groups, or Status Information for an existing user.

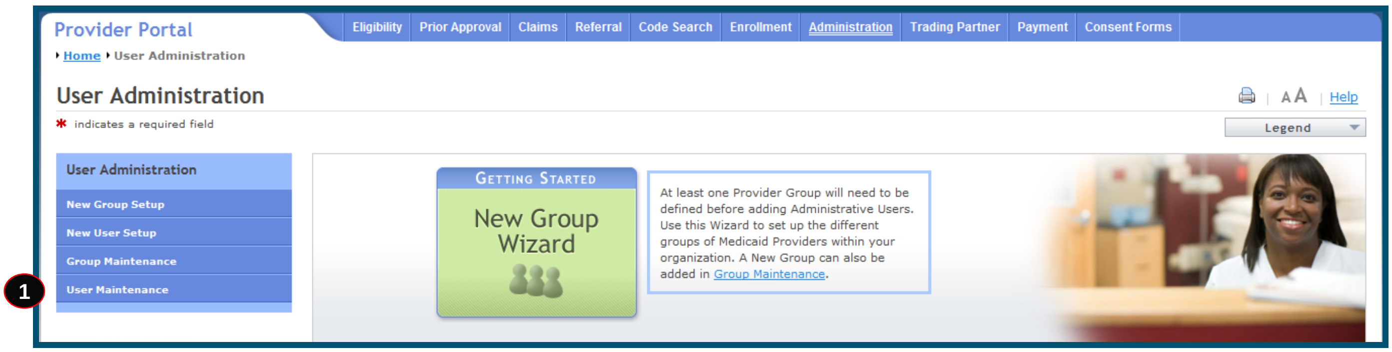

Exhibit 31. User Administration Screen

Step	Action
1	In the **User Administration** menu, select **User Maintenance**.

7.3 USER MAINTENANCE SCREEN

Enter the appropriate search criteria on the **User Maintenance** screen.

7.3.1 User Maintenance Screen – Search Criteria

On this screen, search for users by last name, email address, NCID, user status, or provider group. If users click the Search button without specifying any criteria, all users associated with usersr groups (as an Office Administrator) display.

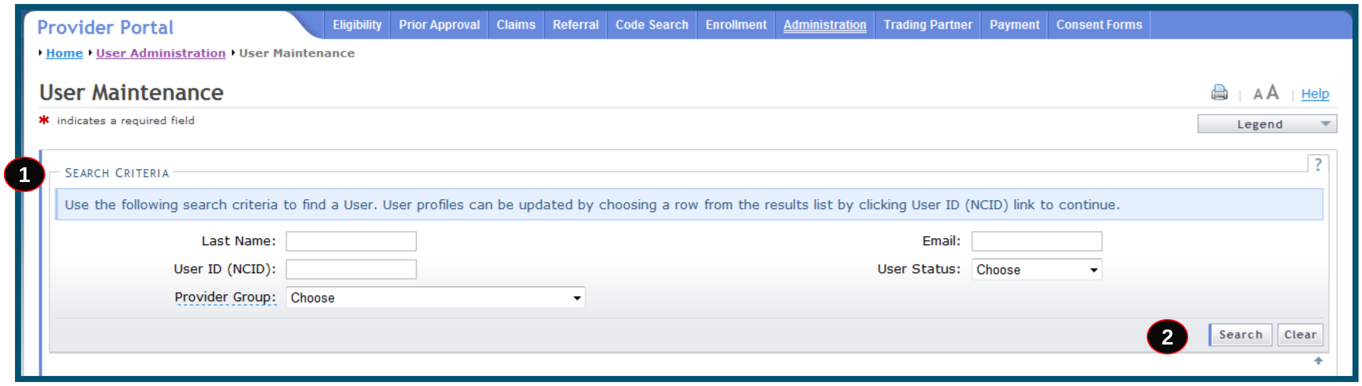

Exhibit 32. User Maintenance Screen: Search Criteria

Step	Action
1	In the **Search Criteria** section, complete any of the following fields to search for a user: • Last Name • User ID (NCID) • Provider Group • Email • User Status
2	Click the **Search** button.

NOTES:

Note: The screen below would display when a User Administrator is a User Administrator for *more than one* Office Administrator. They would enter their search criteria and then select the appropriate Office Administrator from the drop-down list.

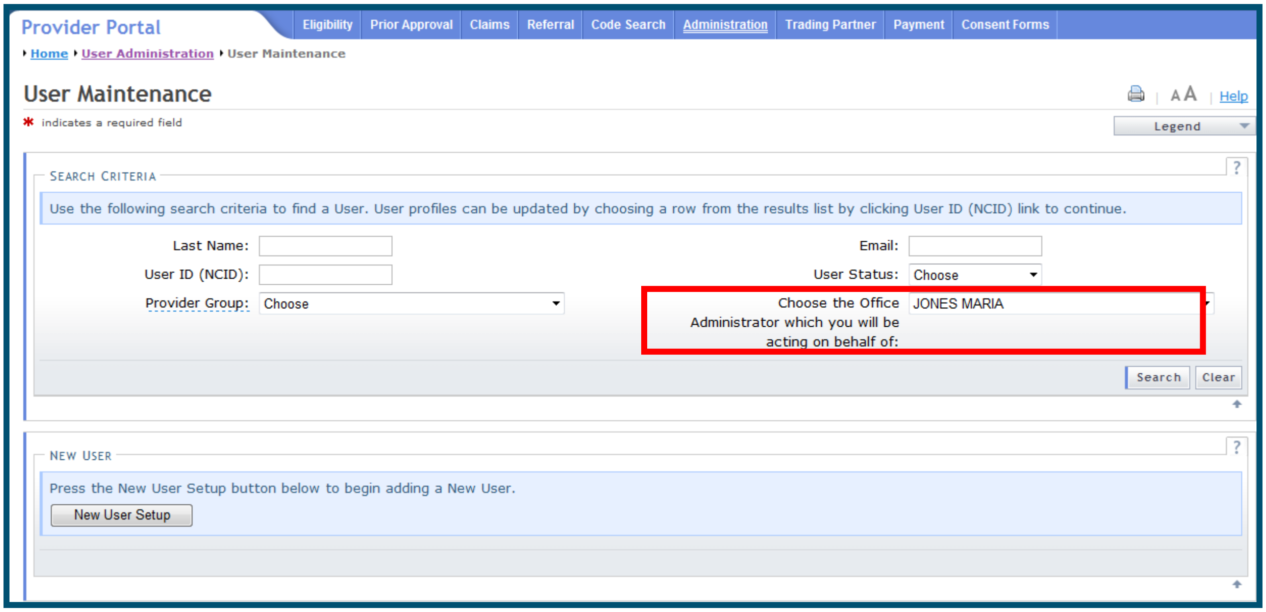

Exhibit 33. User Maintenance Screen: Search Criteria (Multiple Office Administrators)

NOTES:

7.3.2 User Maintenance Screen – Search Results

The results display in the **Search Results** section of the screen.

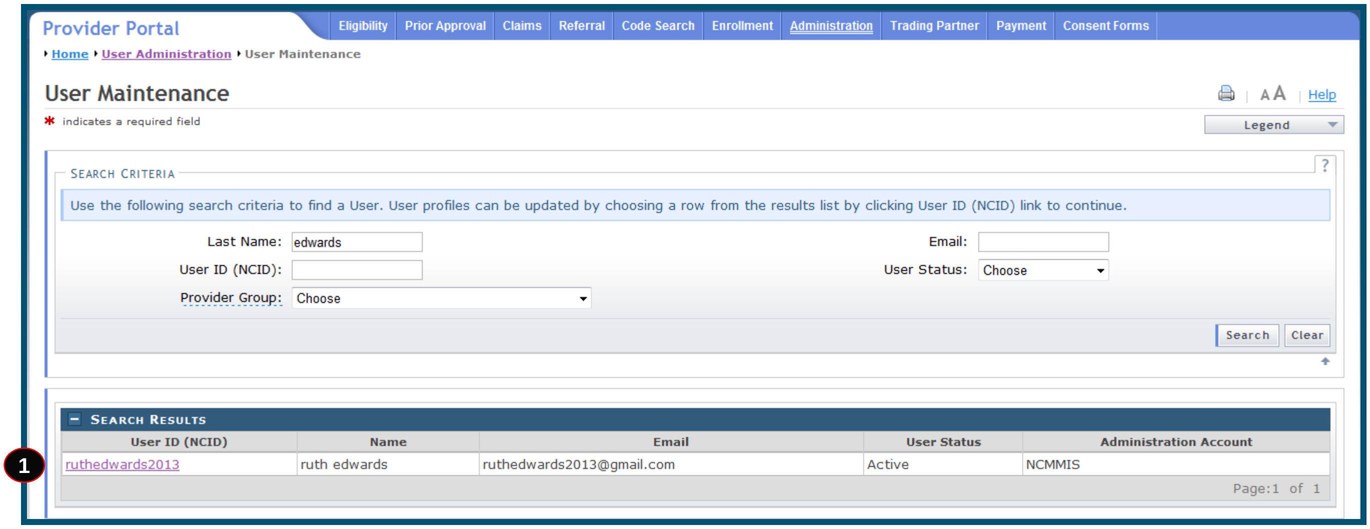

Exhibit 34. User Maintenance Screen: Search Results

Step	Action
1	In the **User ID (NCID)** column, click the appropriate **hyperlink**.

7.4 EDIT USER SCREEN

The **Edit User** screen displays. On this screen, users can:

- Update user information
- Manage PINs (disable, enable, and reset)
- Select provider groups
- Assign access rights

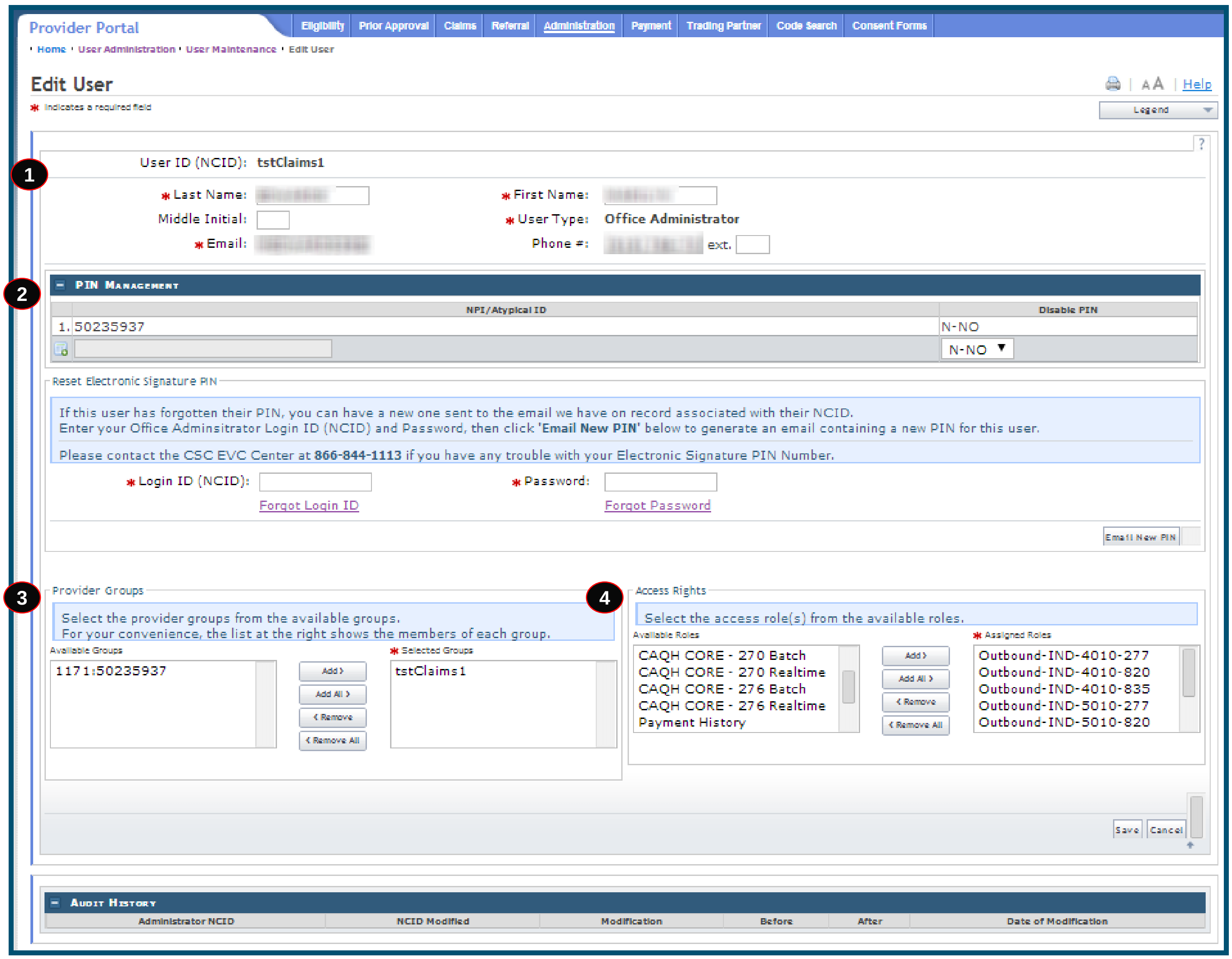

Exhibit 35. Edit User Screen

7.4.1 Edit User Screen – PIN Management Section (Disable PIN)

If the Office Administrator or User Administrator determines that a user should no longer have PIN access (to the NPI record), disable the PIN. In the **PIN Management** section, follow the steps below to disable the user's PIN.

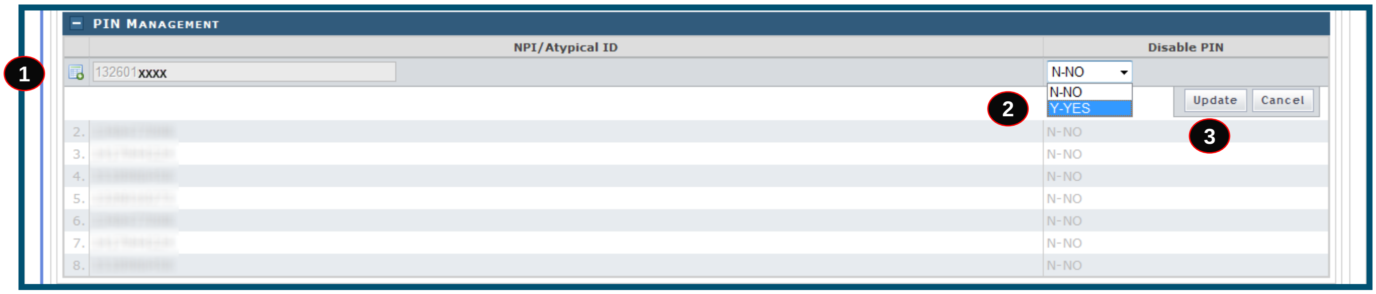

Exhibit 36. Edit User Screen: PIN Management (Disable PIN)

Step	Action
1	Select the **PIN** users want to disable. In this example, notice 132601xxxx was selected.
2	Select **Yes** from the drop-down list.
3	Click the **Update** button.

7.4.2 Edit User Screen – PIN Management Section (Enable PIN)

If PIN rights were disabled at one time and the user is now able to have PIN access (to the NPI record), enable the PIN. In the **PIN Management** section, follow the steps below to enable a user's PIN.

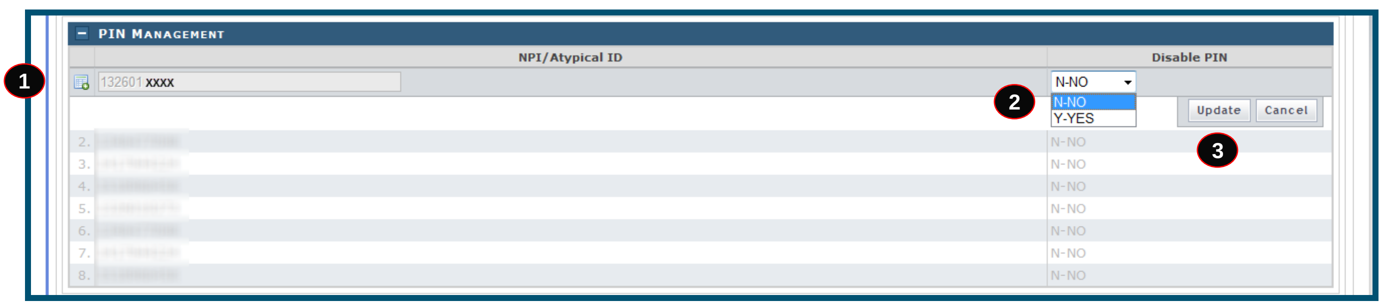

Exhibit 37. Edit User Screen: PIN Management (Enable PIN)

Step	Action
1	Select the **PIN** users want to enable. In this example, notice 132601xxxx was selected.
2	Select **No** from the drop-down list.
3	Click the **Update** button.

7.4.3 Edit User Screen – Reset Electronic Signature PIN Section

On the **Edit User** screen, scroll down to the **Reset Electronic Signature PIN** section. Complete the section in order for a new PIN to be created and e-mailed to the user.

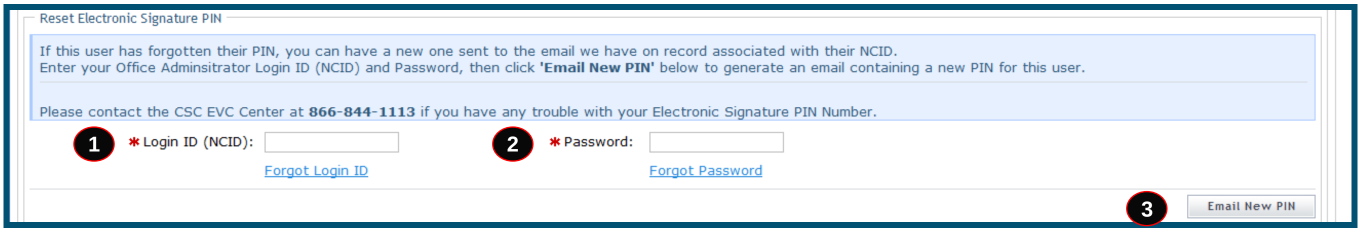

Exhibit 38. Edit User Screen: Reset Electronic Signature PIN

Step	Action
1.	Login ID (NCID): Enter the **NCID** (the NCID of the user users are signed in as).
2.	Password: Enter the **Password** (the password of the user users are signed in as).
3.	Click the **Email New PIN** button.

NOTES:

7.4.4 Edit User Screen – Provider Groups Section

Scroll down the **Edit User** screen to the **Provider Groups** section. Here, users can make any necessary changes to the user's provider groups.

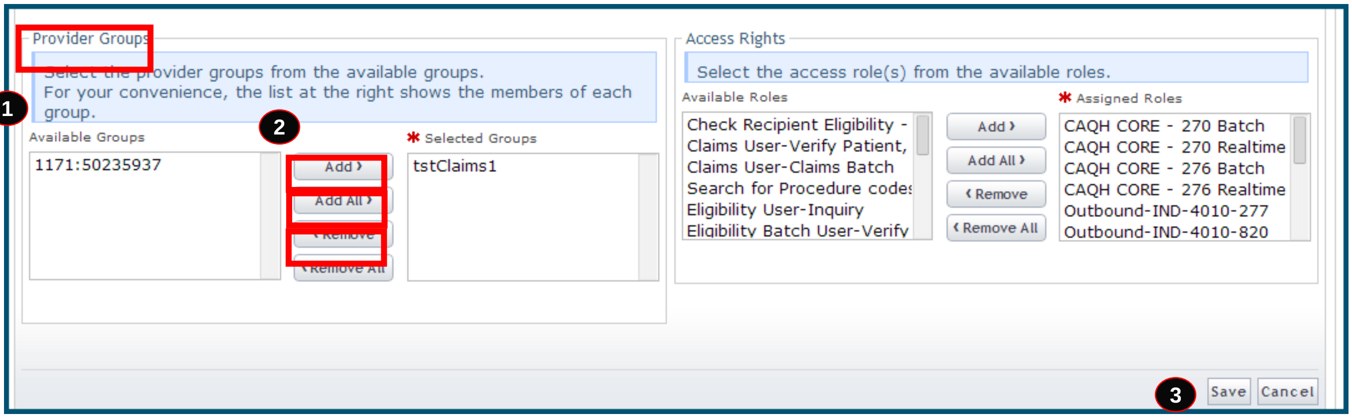

Exhibit 39. Edit User Screen: Provider Groups

Step	Action
1	Available Groups: Select the **group(s)**.
2	Click the **Add** button to add it to the **Selected Groups** section. • To choose more than one group at a time, users would select the appropriate groups while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the groups listed in the **Available Groups** section, users would click the **Add All** button. To remove a group: • Select the appropriate group and users would click the **Remove** button to remove it from the **Selected Groups** section. • To choose more than one group at a time, users would select the appropriate group while holding down the **<CTRL>** key. Then, users would click the **Remove** button. • To remove all the groups listed in the **Available Groups** section, users would click the **Remove All** button.
3	Click the **Save** button

NOTES:

7.4.5 Edit User Screen – Access Rights Section

Access rights determine which information a user can view. Make the necessary changes to the Access Rights in this section. The process is the same as that for updating Provider Groups.

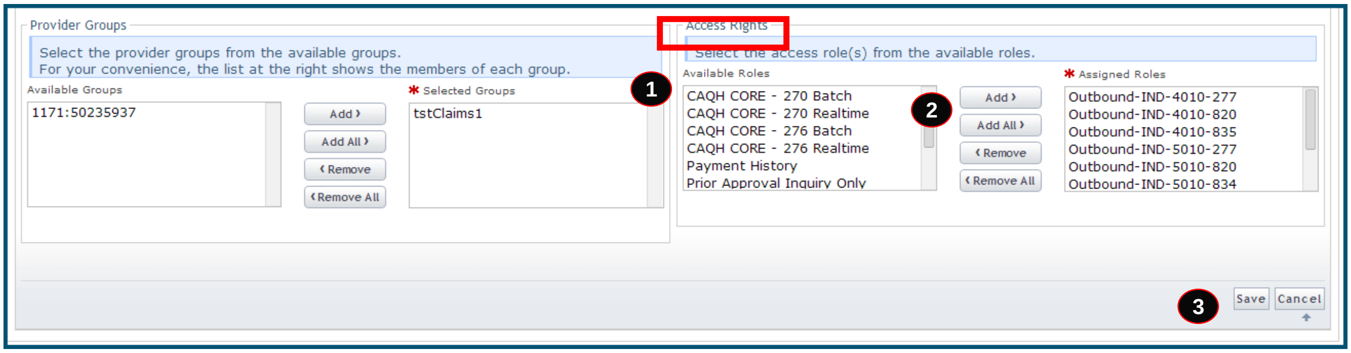

Exhibit 40. Edit User Screen: Access Rights

Step	Action
1	Select the Access Rights from **Available Role(s):** • Claims User - Verify patient, Claims • Claims User - Claims Batch • Search for Procedure Codes • Eligibility User-Inquiry • Eligibility Batch User-Verify and Verify Results • CAQH CORE - 270 Batch • CAQH CORE - 270 Realtime • CAQH CORE - 276 Batch • CAQH CORE - 276 Realtime • Payment History • Prior Approval Inquiry Only • Prior Approval Submit - Submit a Prior Approval • PA User-Request Inquiry, Approval Status • Referrals User-Referral Entry and Inquiry • Remittance User • Supervisor Access - All Access • Training - Training Access
2	Click the **Add** button to add it to the Assigned Roles section. • To choose more than one role at a time, users would select the appropriate roles while holding down the **<CTRL>** key. Then, users would click the **Add** button to add them. • To add all the roles listed in the **Available Roles** section, users would click the **Add All** button. To remove a role: • Select the appropriate role and users would click the **Remove** button to remove it from the **Assigned Roles** section. • To choose more than one role at a time, users would select the appropriate role while holding down the **<CTRL>** key. Then, users would click the **Remove** button.

Step	Action
	• To remove all the roles listed in the **Assigned Roles** section, users would click the **Remove All** button.
3	Click the **Save** button.

7.4.6 Edit User Screen – Audit History Section

At the bottom of the **Edit User** screen, notice that an **Audit History** section displays previous edits made for the selected user as well as the date/time for each edit.

− AUDIT HISTORY

Administrator NCID	NCID Modified	Modification	Before	After	Date of Modification
tstClaims3	terryclark2013	Add- Roles		Claims Submit|Training|	02/21/2013 18:10:30
tstClaims3	terryclark2013	Add - Groups		ABC Cardiology|ABC Diagnostic Imaging|ABC Elderly Services|	02/21/2013 18:10:30
tstClaims3	terryclark2013	Add- User Demographics		Terry Clark |terryclark0000@gmail.com|0000000000 Ext:||General User	02/21/2013 18:10:30

Exhibit 41. Edit User Screen: Audit History

NOTES:

7.5 SUBMISSION CONFIRMATION SCREEN

After completing all user maintenance and clicking the Save button, the **Submission Confirmation** screen displays. The name of the edited user (User NCID) displays to the right of the green check mark.

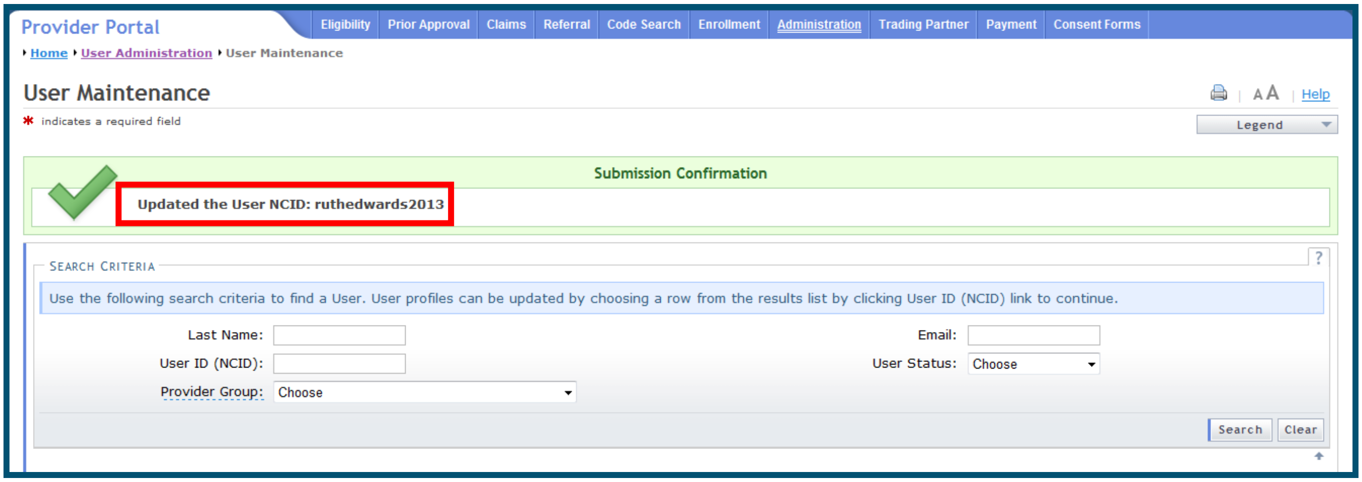

Exhibit 42. Submission Confirmation Screen

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8.0 Resources

For more information, please refer to the Office Admin Functions (CBT).

For further clarification or guidance on specific Policies, please access the North Carolina Office of Medicaid Management Information System Services, (OMMISS) at: http://www.ncmmis.ncdhhs.gov

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Addendum A. Help System

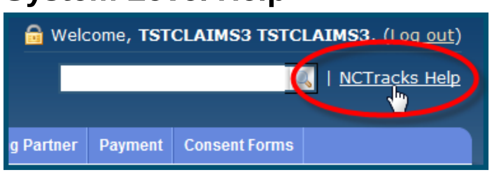
The major forms of help in the NCMMIS NCTracks system are as follows:

- Navigational breadcrumbs
- System-Level Help: Indicated by the "NCTracks Help" link on each page
- Page-Level Help: Indicated by the " Help" link above the Legend
- Legend
- Data/Section Group Help: Indicated by a question mark (?)
- Hover over or Tooltip Help on form elements

Navigational Breadcrumb

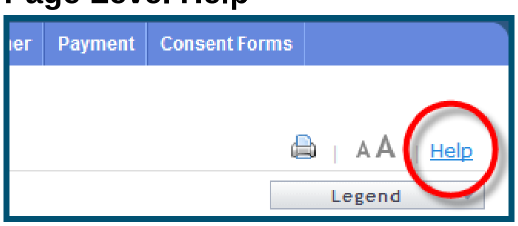
A breadcrumb trail is a navigational tool that shows the user the path of screens they have visited from the home page. This breadcrumb consists of links so the user can return to specific screens on this path.

System Level Help



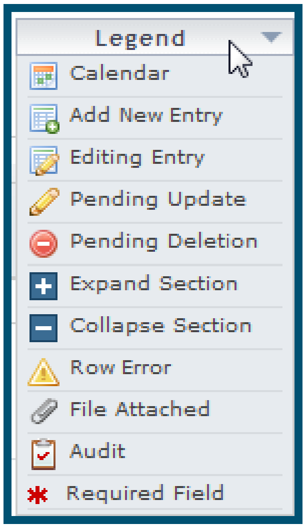
The System Help link opens a new window with the complete table of contents for a given user's account privileges. The System Level Help link, "NCTracks Help," will show up at the top right of any secure portal page or web application form page that contains Page Level and/or Data/Form Group Help.

Page Level Help



Page Level Help opens a modal window with all of the Data/Form Group help topics for the current page. The Page Level Help link shows across from the page title of any web application form page.

Form Legend



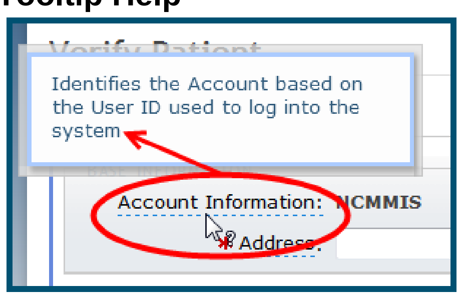
A legend of all helpful icons is presented on pages as needed to explain the relevant meanings. This helps the user become familiar with any new icon representations in context with the form or page as it is used. Move usersr mouse over the Legend icon 

to open list.

Data / Section Group Help

Data/Section Group Help targets the same modal window as Page Level help, but also targets specific form information associated with the Help link the user clicked. Data/Form Group Help shows up as a question mark (?).

Tooltip Help



Tooltip help is available via a popup box that appears slightly above the page element when a user hovers the cursor over the element. Text with an available tooltip has a dashed underline.