How to Affiliate an Individual Provider Record to a Group/Organization in NCTracks

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Overview

The affiliation process allows a group or organization to bill and receive payments on behalf of an individual/rendering provider in NCTracks system, the affiliation is managed by the Individual providers using the Manage Change Request process. This guide provides step-by-step instructions for affiliating an individual provider record to an organization/group provider record in NCTracks.

Certain types of changes will route the application to CSRA for review and approval. For example, adding taxonomy will require credentialing. Adding a new managing employee requires that a background investigation be completed.

The provider affiliation process is an automatic process that will NOT route the application to CSRA as long as no other changes are made to the application.
Logging into the Provider Portal

1. Navigate to www.nctracks.nc.gov

2. The following page will display. Click the Providers tab at the top of the page.

3. From the Providers page, click the NCTracks Secure Portal icon.

4. The following login screen will display. Enter the NCID and password and click the Log in button.
Accessing the Manage Change Request Application

5. The following Providers page will display. Click the **Status and Management** button.

![Figure 4: Select Status and Management](image)

6. The **Status and Management** screen will display. The screen is divided into 6 sections.

![Figure 5: Status and Management Page](image)
Status and Management Sections

Submitted Applications: Displays a list of applications that have been previously submitted.

Saved Applications: Displays a list of applications that have been started but not yet submitted. Please remember that your application must be submitted to the State within 90 days of the date it was created. If not completed within 90 days, the incomplete application will be deleted. It will also be deleted if the Fiscal Agent Operations (CSRA) makes a change to the provider record. If this occurs, you will receive notification message when attempting to resume the application.

Re-enroll: This section will list provider accounts associated with the user’s NCID that have been terminated. The user can select the account to re-enroll, then click ‘Submit’.

Manage Change Request: This section will list provider accounts associated with the users NCID that are active.

Re-verification: This section allows the user to submit a required re-verification application for a provider enrollment account.

Maintain Eligibility: This section allows the user to submit a required maintain eligibility application for a provider enrollment account.

1. To begin a new Manage Change Request, under the Manage Change Request Section, click the radio button next to the NPI to be changed.

2. Next, click the Update button.

If the Manage Change Request section reads NO DATA FOUND, it is possible that a Manage Change Request has already been created and/or submitted, but not yet approved. Check the Submitted Applications and Saved Applications sections for a Manage Change Request/Enrollment that is already in process.

Figure 6: Select Manage Change Request
3. The **Individual Basic Information** screen will display. Click the “Next” button to continue.

   Do NOT click the menu options on the left hand side of the screen, as each page must be accessed/reviewed before the **Manage Change Request** can be submitted. Instead, to navigate to appropriate section, click the Next button on the bottom right corner of the screen until you reach the **Affiliate Provider Information** screen.

   ![Figure 7: Basic Information Page](image)

4. On the Terms and conditions page, to attest and accept Medicaid Terms and Agreements, click the check box.

5. Click the **Next** button. Continue to click the **Next** button until you reach the “Affiliated Provider Information” screen.

   ![Figure 8: Attestation Statement](image)
Searching for the Group/Organization NPI

1. The **Affiliated Provider Information** screen will display. To display the search option, click the **Yes** radio option illustrated below.

![Figure 9: Affiliate Provider Option](image)

2. Once you reach the **Affiliated Provider Information** page, enter the Group/Organization NPI in the search field.
3. Click the **Lookup NPI** button.

![Figure 10: Affiliated Provider Information Page](image)
Adding the Group/Organization NPI

4. The search results will display. Click the checkbox next to the appropriate provider.

![Warning]
The provider to which you are affiliating must be first be enrolled in Medicaid. If you are not able to locate the provider record using the search criteria, check with the provider to ensure their enrollment has been fully completed and approved.

5. Click the **Add** button in the bottom right corner of the window.

![Search Results]

6. The provider will be added on the dark blue bar, as illustrated below. To review the provider, click the plus sign on the dark blue bar.

![Affiliation Completed]
7. The affiliated provider details will display. To delete the provider, click the **Delete** button.

The **Delete** button is ONLY available until you submit the Manage Change Request application. Once a provider affiliation has been processed, the affiliated provider cannot be completely removed from the individual provider record. It can only be end-dated.

![Figure 13: Deleting an Affiliated Provider](image-url)
End-Dating the Group/Organization Affiliation

Once a provider affiliation has been processed, the affiliated provider cannot be completely removed or deleted from the individual provider record. It can only be end-dated.

8. To edit the provider, click the “Edit” button in the bottom right corner.

![Figure 14: Select Edit](image)

9. Select the “End Date” and click the “Save” button.

![Figure 15: Select End Date](image)
10. Click the “Next” button to continue.

Reviewing, the Manage Change Request

1. The “Review Application” screen will display. On the left hand margin, verify that all application pages have a green check mark next to each page. In addition, verify the contact email address listed on the page. This can be updated on the Basic Information page.

To review the application in Adobe PDF format, click the Review Application button. Click the Next button to proceed to the Attachments/Submit Electronic Application page.
Manage Change Request - Navigation Error

All pages must be reviewed prior to continuing. If you receive the following error, click on the pages that do not have check marks next to the section and click **Next** through each section.

**Error Summary**

* Please fix the following errors before you proceed.
  * Please complete all pages in this application before proceeding.

Figure 18 Error - Complete all Pages in the Application

**Figure 19: Review Application - Incomplete Pages**

- **Electronic Signature - Email Confirmation**
  - Please confirm that the email address below is correct before submitting the next page. You will need access to this email address if you make changes.
  - If the email address is incorrect, you may now navigate to the previous page and change the address.

- **Contact Email:**

To review your application in Adobe PDF format, click 'Re...
Signing and Submitting the Manage Change Request

1. The **Sign and Submit Electronic Application** page will display.
2. Enter your NCID and password, as well as the **PIN** number. Click the **Submit Now** button.

**Figure 20: Sign and Submit**
Printing the Application

1. The **Final Steps** page will display. You may click on the links below, to print or save a copy of the application or cover sheet in PDF format.

![Final Steps Page](image)

Figure 21: Final Steps Page

Application Status

To verify the status of the request, navigate to the Status and Management page. As long as no other changes have been made to the provider record, the status should read **Approved**. This indicates that the affiliation has been completed. If the status reads **In Review**, this indicates that other changes were made that require CSRA to review or credential the application. You may check back periodically to review the status.

![Status and Management Page](image)