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North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

JOB AID
Adding a Service Location and Affiliating an Individual Provider Record to a Group/Organization in NCTracks

OVERVIEW

The process of adding a service location and affiliation allows a group or organization to bill and receive payments on behalf of an individual Rendering/Attending provider in the NCTracks system. The service location and affiliation are managed by the individual providers by using the Manage Change Request process. This Job Aid provides step-by-step instructions for adding a service location and affiliating an individual provider record to a group/organization provider record in NCTracks.

Note: Certain types of changes will route the application to CSRA for review and approval. For example, adding a taxonomy requires credentialing; adding a new managing employee requires completion of a background investigation.

LOGGING INTO THE PROVIDER PORTAL

1. Navigate to www.nctracks.nc.gov.

2. The **NCTracks Home** page displays. Select the **Providers** tab at the top of the page.
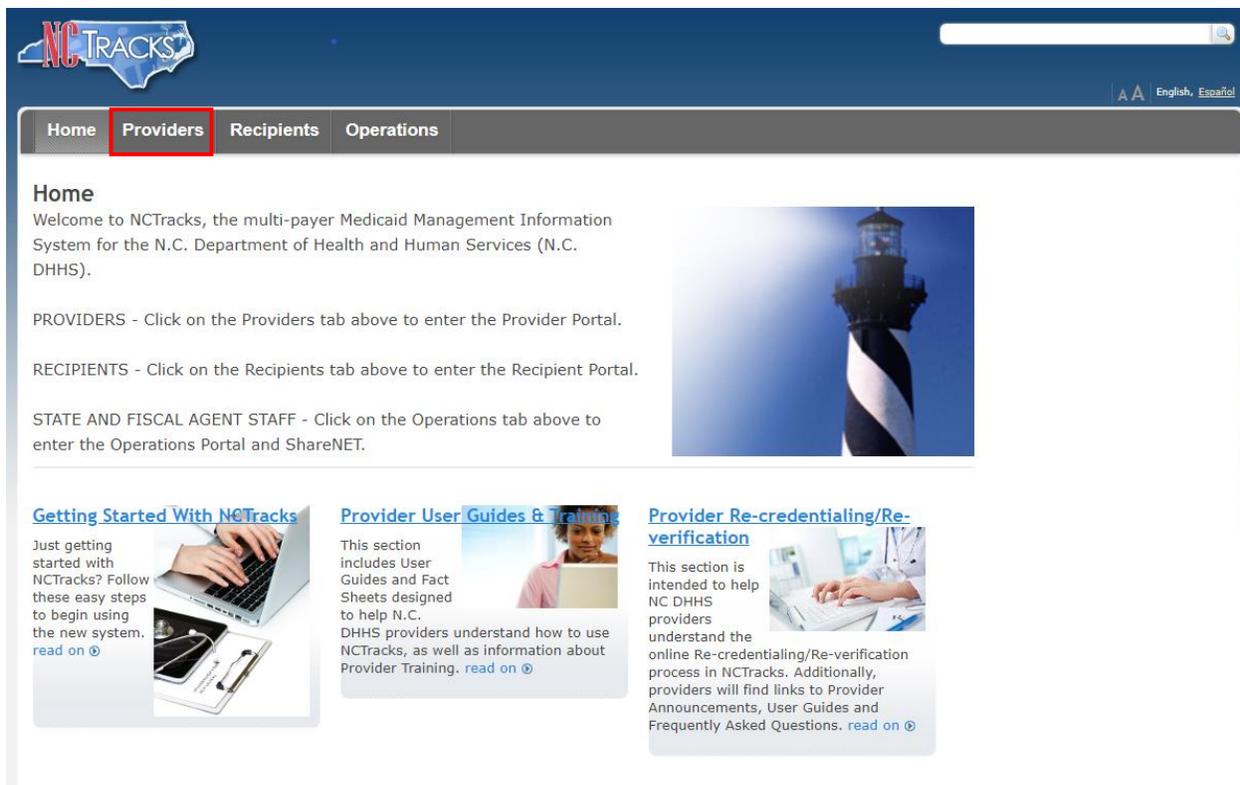
Exhibit 1. NCTracks Home Page

3. The public **Providers** page displays. Select the **NCTracks Secure Portal** icon.

CSRA

North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES
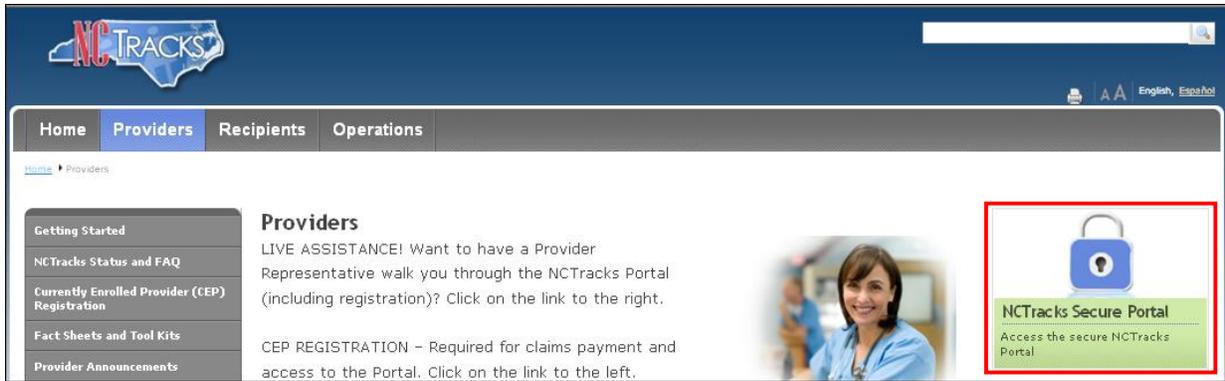
Exhibit 2. Public Providers Page

4. The **Provider Portal Login** page displays. Enter the **NCID** and **Password** and select the **Log In** button.
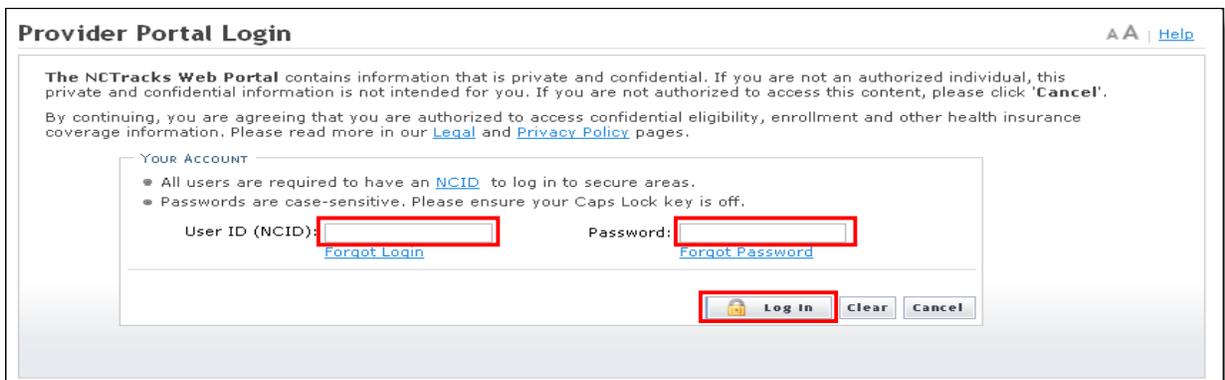
Exhibit 3. Provider Portal Login Page

ACCESSING THE MANAGE CHANGE REQUEST APPLICATION

1. The secure **Provider Portal Home** page displays. Select the **Status and Management** button.
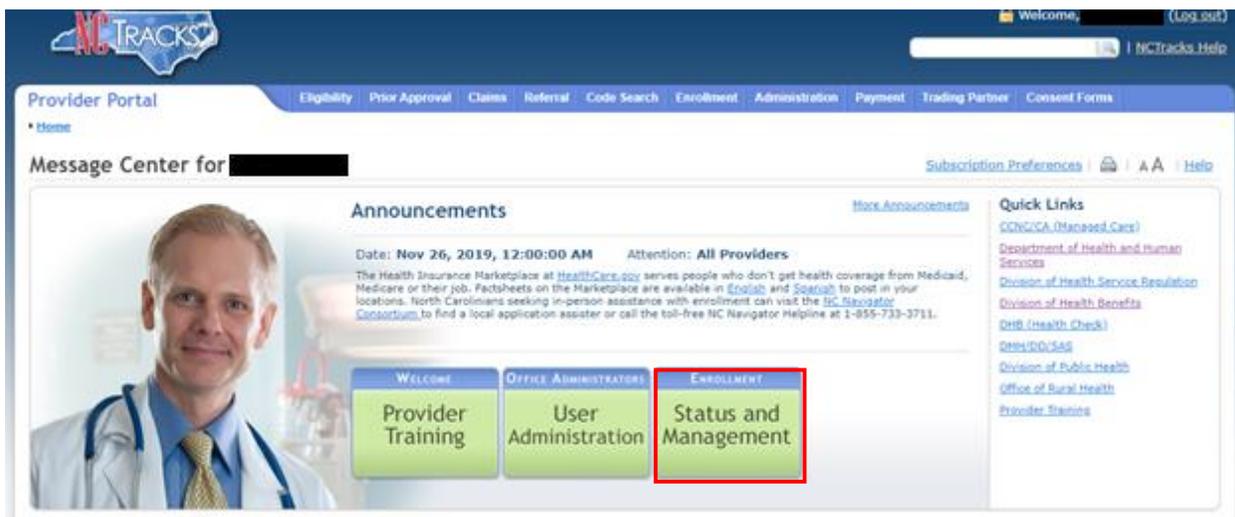
Exhibit 4. Secure Provider Portal Home Page

The **Status and Management** page displays.

Exhibit 5. Status and Management Page

Status and Management Page Sections

The **Status and Management** page contains the following 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 Fiscal Agent Operations (CSRA) makes a change to the provider record. If this occurs, you will receive a notification message when attempting to resume the application.
- **Re-enroll:** Lists provider accounts associated with the user's NCID that have been terminated. The user can select an account to re-enroll, then select **Submit**.
- **Manage Change Request:** Allows the user to submit a Manage Change Request application for an active provider enrollment account.
- **Re-verification:** Allows the user to submit a required Re-verification application for a provider enrollment account.
- **Maintain Eligibility:** Allows the user to submit a required Maintain Eligibility application for a provider enrollment account.

CSRA

North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

- **Enrollment Specialist Applications:** Lists applications (Enrollment, Re-enrollment, Manage Change Request, Re-verification, and Maintain Eligibility) that the Office Administrator (OA) assigned to an Enrollment Specialist to complete.
- **Fingerprinting Required:** Allows the user to submit a Fingerprinting Required application for a provider enrollment account.

2. Scroll down to the **Manage Change Request** section.

Starting the Application

1. To begin a new Manage Change Request, select the radio button next to the National Provider Identifier (NPI) to be updated.

2. Select the **Update** button.

   Note: If the **Manage Change Request** section reads 'NO DATA FOUND', it is possible that a Manage Change Request has already been created, but not yet approved. Check the **Submitted Applications** and **Saved Applications** sections for a Manage Change Request/Enrollment application that is already in process.
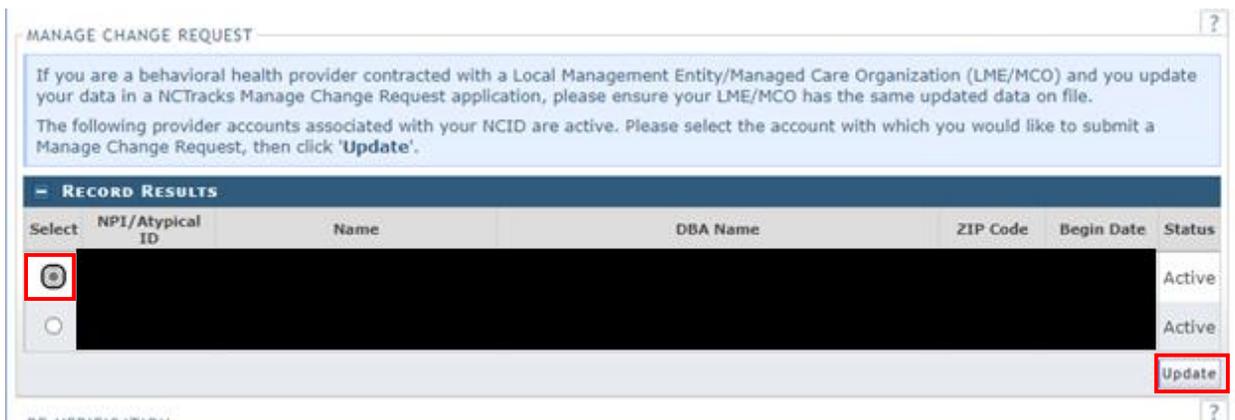
Exhibit 6. Status and Management Page – Manage Change Request Section

3. The **Requested Manage Change Request Type** page displays. Select the option **MANAGE CHANGE REQUEST: Complete multiple changes or review your complete provider record**.

4. Select the **Next** button.

CSRA
North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

Exhibit 7. Requested Manage Change Request Type Page

5. The **Individual Basic Information** page displays. Select the **Next** button to continue.

   Important: Do NOT select the hyperlinks on the left side of the page to advance to the next page. It is required that each box has a check mark before the Manage Change Request can be submitted. Instead, select the **Next** button in the bottom right corner of each page to navigate through the pages.

Exhibit 8. Individual Basic Information Page – Select Next

6. On the **Terms and Conditions** page, to attest and accept Medicaid Terms and Agreements, select the **Attestation** checkbox. Select the **Next** button.

Exhibit 9. Terms and Conditions Page – Attestation

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North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

Adding Service Locations

On the **Addresses** page, to add an additional service location:

1. Select **Yes** to the question '**Do you have additional service locations?**'.

2. Enter the service location address in the **Address** fields.

3. Select the **Verify Address** button.

   Note: To ensure the accuracy of the address, the system verifies the entered information against the United States Postal Service (USPS) database. If the address matches the USPS database, the **Addresses** page will refresh with the new address.

4. Select the **Add** button to add the service location.

Exhibit 10. Addresses Page

5. Select the **Next** button.

Service Locations Message

Note: Since a second service location has been added, the following message will display at the top of each page until the **Method of Claims Submission** page is reached. Each location should be shown as 'Complete' before proceeding to the next page.

Exhibit 11. Service Locations Message

Adding Taxonomy Codes

On the **Taxonomy Classification** page, to add a Taxonomy:

1. Under the **Add Taxonomy Classification** section, select the **Provider Type**.

2. Select the **Classification** (if available).

3. Select the **Area of Specialization** (if available).

4. Enter or select the **Begin Date**.

5. Select the **Add** button.

6. Select the **Save Location** button.

7. Select the **Next** button to proceed to the **Accreditation** page.

Exhibit 12. Taxonomy Classification Page

Adding Accreditation Information

On the **Accreditation** page, to add accreditation information:

1. Select the **License Agency**.

2. Select the **License Type**.

3. Select the **State** of the license.

4. Enter the **License #**.

5. Enter or select the **Effective Date**.

6. Select the **Add** button.

7. Select the **Save Location** button.

Note: Once the **Accreditation** page displays, the service locations message (shown in Exhibit 11) will be present and will default to update the new location. However, if a selection is made to update the existing service location, there will be an option to '**Copy this license to all service locations**'. Select the **Next** button. Continue to select the **Next** button until you reach the **Affiliated Provider Information** page.

Exhibit 13. Accreditation Page

CSRA

North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

8. The **Affiliated Provider Information** page displays. To expand the page to display the search option, select **Yes** to the question '**Do you wish to link or affiliate with another enrolled provider?**'.

Affiliated Provider Information

✳ indicates a required field

✳ AFFILIATED PROVIDER INFORMATION
Do you wish to link or affiliate with another enrolled provider?
◉ Yes   ○ No

Exhibit 14. Affiliated Provider Information Page

9. Enter the Group/Organization NPI in the **NPI** search field.

10. Select the **Lookup NPI** button.

| Eligibility | Prior Approval | Claims | Referral | Code Search | Enrollment | Administration | Trading Partner | Payment | Consent Forms |

e Provider Enrollment Ap...

Affiliated Provider Information

✳ indicates a required field

Legend ▾

AFFILIATED PROVIDERS

The affiliation allows this organization to bill and receive payment on your behalf.

Add Affiliated Provider

Enter organization's NPI and click '**Lookup NPI**'.

✳ NPI: 0000000000   [Lookup NPI]

Add

‹‹ Previous

Please be sure to complete all
required fields with valid content.

Next ››

Save Draft   Delete Draft

Exhibit 15. Affiliated Provider Information Page – Lookup Group/Organization NPI

Adding the Group/Organization NPI

1. The search results display. Select the checkbox(es) next to the appropriate provider location(s).

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

2. Select the **Add** button.

CSRA

North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

Exhibit 16. Affiliated Provider Information Page – NPI Search Results

3. A new section for the provider is added and is marked with a dark blue bar, as shown in the following exhibit. To review the provider, select the plus sign to expand the section.

Exhibit 17. Affiliation Completed

The affiliated provider details display.

4. To remove the provider affiliation, select the **Delete** button.

    Note: 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. The affiliation can only be end-dated.

CSRA

North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

Exhibit 18. Deleting an Affiliated Provider

End-Dating the Group/Organization Affiliation

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

1. To edit the provider record to end-date the affiliated provider, select the **Edit** button.

Exhibit 19. Select Edit

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North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

2. Select the **End Date** and select the **Save** button.

Exhibit 20. Select End Date

3. Select the **Next** button to continue.

REVIEWING THE MANAGE CHANGE REQUEST

1. The **Review Application** page displays. On the left side of the page, verify that each listed application page has a green check mark. In addition, verify the contact email address listed on the page. The email address can be updated on the **Basic Information** page, if necessary.

2. To review the application in Adobe PDF format, select the **Review Application** button. Select the **Next** button to proceed to the **Attachments/Submit Electronic Application** page.

Exhibit 21. Review Application Page

Navigation Error

Note: All pages must be reviewed prior to continuing. If you receive the following error, select the pages that do not have check marks and select **Next** to navigate through each page.

CSRA

North Carolina Medicaid Management
Information System (NCMMIS)

February 13, 2023

NC DEPARTMENT OF
HEALTH AND HUMAN SERVICES

Exhibit 22. Review Application – Incomplete Pages

SIGNING AND SUBMITTING THE MANAGE CHANGE REQUEST

The **Sign and Submit Electronic Application** page displays. To submit the Manage Change Request:

1. Enter the **NCID** and **Password**.

2. Enter the **PIN**.

3. Select the **Submit Now** button.

Exhibit 23. Sign and Submit Electronic Application Page

PRINTING THE APPLICATION

The **Final Steps** page displays. If desired, select the hyperlinks on this page to print or save a copy of the application or cover sheet in PDF format.

Exhibit 24. Final Steps Page

APPLICATION STATUS

To verify the status of the Manage Change Request, navigate to the **Status and Management** page in NCTracks. If the affiliation was the <u>only</u> change made to the individual provider record, the Status should read **Approved**. This indicates that the affiliation has been completed. If adding service locations and/or making other changes to the individual provider's record, the Status may read **In Review**. This indicates that the other changes require CSRA to review or credential the Manage Change Request. You may check periodically to review the status.

Exhibit 25. Status and Management Page – Application Status

JA_PRV222_Add Service Loc and Affil_W1.0.1