Provider Portal Tutorial

Manage My Clinic Administrator Guide

SANFORD HEALTH PLAN

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Creating New User Accounts

Use this process for any person who should have access to your tax ID(s) within the Sanford Health Plan Provider Portal.

1. Log in to the Provider Portal.
2. Click on the **Admin** button at the top of the screen.
3. Select **Sanford Health Plan Portal – Request Provider Portal Access for New or Existing User**. This will open a form to be completed.

Please note *that if you are requesting through a portal other than Sanford Health Plan Provider Portal (such as One Chart link), the "Sanford Health Plan Provider Portal" user type may not appear as an option. You will need to log into the Provider Portal to complete the request.*

4. For **User Type,** select Sanford Health Plan Provider Portal.
5. Complete the required fields on the form.
    a. **Name (Last, First)**
    b. **User Group**
        i. Do not select **"New Group"**
    c. **Work Email**
    d. **Phone number that can receive text messages**
    e. **Request is for**
        i. Select **"New User"**

Creating New User Accounts (Cont.)

f. **Password Reset PIN –** this should be a 4-digit pin that will be used to verify the user if IT assistance is required.
   i. The PIN cannot be 4 digits that are the same (0000) or sequential (1234).
   ii. Each user should choose their own PIN, or the administrator may use their last 4 digits of their social security number.
   iii. Do not intentionally assign the same PIN to multiple users – these must be unique identifiers for each user.
   iv. Advise user of their PIN if it is selected by the administrator. Sanford Health Plan does not send this information to the user during the user set up process.

g. **Apply to all locations associated with Tax ID(S)** – this is where you can add any other tax IDs the user should have access to.

6. Once the fields are completed, scroll down to select the **"Submit Request"** button.

Please note *that if a request is denied, you will receive a message in your inbasket advising of the issue/error.*

Unlocking Current User Accounts

1. Log in to the Provider Portal.
2. Click on the **Admin** button at the top of the screen.
3. Select **"Request New Account"**
4. Select **Sanford Health Plan Portal – Request Provider Portal Access for New or Existing User**. This will open a form to be completed.
5. Complete the required fields on the form

   a. **Name (Last, First)**

   b. **User Group**
      i. Do not select **"New Group"**

   c. **Work Email**

   d. **Phone number that can receive text messages**

Unlocking Current User Accounts (cont.)

5. Complete the required fields on the form (cont.)
    e. **Request is for**
        i. Select **"Update to Existing User"**

    f. **User ID to Update**

    g. Select **"Requested Change"**
        i. Select the appropriate option for the situation:
            1. **Add Provider Portal** – Use when user has access to other Sanford Epic products but also needs portal access.
            2. **Update Phone Number or Email** – used when updating contact information.
            3. **Update Tax ID Access** – Used for updating tax ID accesses.
            4. **Other** – for any other situations that do not apply to the previous options. You are required to add comments for this situation to ensure the correct updates are made.

6. Once the fields are completed, scroll down to select the **"Submit Request"** button.

User Verification Process

You will receive notifications in the portal and via email up to 2 weeks prior to the verification period. Please ensure timely verification is completed to ensure that all users do not lose access to your facility account.

1. Log in to the Provider Portal. You will see a message alerting you that site verification is needed. This occurs quarterly and each facility is given one month for all users to complete the verification process.

2. Click on the **Admin** button at the top of the screen. This will open a drop-down menu.

3. Select **"Manage My Clinic"**. This will open a list of current users with access to your tax id(s) and a list of current physicians associated with your tax ID(s).

Please note *that you only need to accurately verify the access for the users, not physicians. You will still need to mark an indicator of YES or NO for the physician to complete the process, but any indications that a physician is no longer with your health system will not be used as notification to update our directory or any other area. Instead, you should still complete the Update Change Form available on our website at* ***sanfordhealthplan.com/providers/contracting-and-credentialing****.*

User Verification Process (cont.)

4. If a user is still active, click Yes. If they are not, or should not have access any longer, click No.
    a. You will need to complete a Yes or No for each person listed before it will allow you to complete the verification process.

IF a quarterly verification is not completed within the month, users associated with your facility's tax ID(s) will lose access to the Provider Portal until it is completed.

***Note:** If your facility utilizes a 3rd party that you've approved their access to the portal for, you are responsible for working with that 3rd party to ensure that they are also verified accurately.*

Submitting New Administrator Request

At any time, you can request the addition of an administrator. Only one user can be given administrative rights, so please keep that in mind when deciding. Determine which process to follow based on if they are already a current user or do not have access to the provider portal at this time, and follow the instructions outlined previously in this guide.

1. For new users, you will select the checkbox that indicates **Make this user a Site Administrator**.
2. For current users, you will submit an Update Request with a **Reason of Other** – and in the comments, advise that you would like to update their access to be Administrator.

***Note:** 3rd Parties you've hired on your/business's behalf may not be designated as an administrator.*

Deactivating User Access

At any time, you can request the removal of a user from the Provider Portal.

1. Log in to the Provider Portal.
2. Click on the **Admin** button at the top of the screen.
3. Open the **"Manage My Clinic"** tab. This shows a list of users and providers associated with your tax ID.
4. Search the list for the user in question.
5. Click the **"minus (-) box"** to the right side of the user's name. This will submit the request to our IT team to remove access.

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Adding a New Tax ID to your Group

The administrator will need to submit an email to **providerrelations@sanfordhealth.org** indicating the new tax ID. This process can take up to 10 business days.

Adding a New Tax ID to Current User

1. Log in to the Provider Portal.
2. Click on the **Admin** button on the top of the screen.
3. Select **"Request New Account"**
4. Select **Sanford Health Plan Portal – Request Provider Portal Access for New or Existing User**. This will open a form to be completed.
5. Complete the required fields on the form
    a. **Name (Last, First)**
    b. **User Group**
        i. Do not select **"New Group"**
    c. **Work Email**
    d. **Phone number that can receive text messages**
    e. **Request is for**
        i. Select **"Update to Existing User"**
    f. **User ID to Update**
    g. Select **"Requested Change"**
        i. Select **"Update Tax ID"** Access – Used for updating tax ID accesses.
6. Once the fields are completed, scroll down to select the **"Submit Request"** button.

***Please note** that if a request is denied, you will receive a message in your inbasket advising of the issue/error.*

Notes

- If you have access to additional Sanford EPIC products, like One Chart Link or Plan Link, you will need to ensure that during the sign-on process, you switch your department type to Sanford Health Plan or you may not have access to all administrator tools.
- If you are the administrator for additional Sanford EPIC Products, like CareLink, ensure that you are signed into the correct platform when submitting requests and ensuring that you select **Sanford Health Plan Portal – Request Provider Portal Access for New or Existing User. See the listing below for links and descriptions to better understand those products**.

My Enrollment:
sanfordhealthplan.com/myenrollment
myEnrollment is our web-based, interactive enrollment platform that employers can use to enroll or make benefits changes to employee coverages in most of Sanford Health Plan's products directly over the Internet. myEnrollment ensures that enrollment/change forms are complete when submitted and alerts employer or employee users of missing or invalid information. myEnrollment guides users through the enrollment process and offers online help for other changes.

Provider Portal/Tapestry Link:
provider.sanfordhealthplan.org/Portal/common/epic_login.asp
For Providers to submit referrals/authorizations for members with Sanford Health Plan insurance, or at Sanford Health Plan locations.

One Chart Link:
onechartlink.sanfordhealth.org
One Chart Link is used by outside providers to access their patients' charts. For example, a non-Sanford clinic. If their patient goes to Sanford for care, they can pull up their patient and review notes, labs, etc. with this product.

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