

REMI User Manual – Provider Portal Dashboard

PCE Systems

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Provider Portal Dashboard

Provider Portal Dashboard Overview

The Provider Portal Dashboard was created to allow contractor provider staff to manage many of the requirements of the PIHP/CMH all from one screen.

- Click on the [Provider Portal Dashboard](#) link off the Provider Management menu; the following screen will display:

Provider Portal Dashboard

My Locations

Name (ID) ¹	Type	Address	
Addiction Treatment Services (56)	Vendor	1010 S Garfield Ave. Traverse City, MI 49686-3434	View Manage Staff/Contacts
Addiction Treatment Services - Dakoske Hall (418) ATS Dakoske Hall	SA Treatment Agency	116 E. Eighth Street Traverse City, MI 49684-2524	View Manage Staff/Contacts

Missing and Expired Licenses / Qualifications / Insurances

Group By: ¹ Provider Item

Showing 3 of 3 Items

Provider ²	Item ³	Expiration ¹	Due in	Status	
Addiction Treatment Services - Dakoske Hall (418)	SUD License	07/31/2020	-80 days	Expired	Enter / Renew View
Addiction Treatment Services - Detox (511)	SUD License	07/31/2020	-80 days	Returned to Provider	View Change

Document Submission Portal

Group By: ¹ Provider Category Document

Showing 5 of 5 Documents

Provider ²	Document ³	Period Covered	Due	Due in ¹	Submission Date	Status	
Addiction Treatment Services - Outpatient (13425)	Signed Contract Contract Document	-	10/13/2020	-6 days		Past Due	Add Document View Request
Addiction Treatment Services - Detox (511)	Sentinel Event Submission	07/01/2020 - 09/30/2020	11/30/2020	42 days		Due Soon	Add Document

Missing and Expired Staff Credentials

Group By: ¹ Staff Provider Credential

Showing 3 of 3 Credentials

Staff ³	Provider ²	Credential ⁴	Last Expiration ¹	Due in	Status	
Test Provider, Katy (3734)	Addiction Treatment Services - Outpatient (13425)	Certification ASAM			Returned to Provider	View Change View Staff
Test Provider, Katy (3734)	Addiction Treatment Services - Outpatient (13425)	Signature Credentials			Submitted for Approval	View View Staff

Action Pending Authorizations Summary

Provider ¹	Awaiting Approval	Returned to Requester	Recently Approved ¹
Addiction Treatment Services - Dakoske Hall (418)	0	3	0
Addiction Treatment Services - Detox (511)	0	1	0
Addiction Treatment Services - Phoenix Hall (510)	0	2	0

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My Locations

This section of the Provider Portal Dashboard will display all of locations that are associated with one company/organization (Provider) e.g. ABC Services has an administrative office and 5 additional physical locations providing services, all 6 locations will be listed. Under this section of the dashboard, the Provider is able submit requests for adding Provider Staff records to the system, including credentials and assigned locations.

- Click the Manage Staff/Contacts link to the right of the location address; the following screen will display:

Provider Addiction Treatment Services - Outpatient Phone 231.620.5856	Location Type SA Treatment Agency Fax 231.929.4216	Address 1010 S. Garfield Ave. Traverse City, MI 49686-3434
----------------------------------------------------------------------------------------------	---------------------------------------------------------------------------	-------------------------------------------------------------------------

Affiliate / CMH: MSHN SUD	Staff ID: <input type="text"/>
Staff Name: <input type="text"/>	Assigned Location: Addiction Treatment Services - Outpat...
Staff Type: <input type="text" value="*Any"/>	Credential Type: <input type="text" value="*Any"/>
Credential Expires On/Before: <input type="text" value=""/>	<input type="button" value="Search"/>
<input checked="" type="checkbox"/> Show Active Staff Only	<input type="checkbox"/> Exclude Contract Provider Staff
Group By: <input type="checkbox"/> Primary Location	

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Showing 1 of 1 Staff

Name	User ID	Type	Primary Location	
Test Provider, Katy (3734)	pce_kttest	Other	Addiction Treatment Services - Outpatient (13425)	New Provider Staff Request Form Change View Reset Password

[5 Assigned Locations](#) [6 Credentials](#)

New Provider Staff Request Form

This link is used to complete the information needed to add a new staff record for submission to the PIHP/CMH for approval. Staff records are needed for staff to access the PIHP/CMH electronic health record (EHR). Before adding a new staff request, verify that the staff record is not already in the system.

- Enter the first few letters of the staff's first **OR** last name (not both) and then click the Search button.
- If the correct staff record does not display, then click the [New Provider Staff Request Form](#) link and the following screen will display.

Staff

Affiliate / CMH
MSHN SUD

Primary Provider
Select a primary location / provider for provider staff. Additional locations can be specified once the record is saved using Assigned Locations tab.

56 **Addiction Treatment Services**

Address
1010 S Garfield Ave.

City State Zip
Traverse City MI 49686-3434

First Name * Middle Initial Last Name * AKA

Date of Birth
Gender
 Female Male

Phone Fax Email Address
 Automatically Send Calendar Appointments to Email

Hire Date Termination Date

Title

Supervisor

This staff should be notified of authorizations

Setup / Provider Notes *
Specify the staff's role / permissions, whether or not the Login ID is needed, desired Login/User ID

characters left: 512

Select applicable contact type(s)

<input type="checkbox"/> Clinical Director	<input type="checkbox"/> CMHSP HCBS Lead	<input type="checkbox"/> Compliance Officer
<input type="checkbox"/> Credentialing	<input type="checkbox"/> Customer Service	<input type="checkbox"/> Executive Director/Contracts
<input type="checkbox"/> Finance	<input type="checkbox"/> Home Manager	<input type="checkbox"/> Owner / Operator
<input type="checkbox"/> Quality Improvement (QI)	<input type="checkbox"/> Rights Advisor	<input type="checkbox"/> Sentinel/Critical Events
<input type="checkbox"/> Site Review/Audit		

Record Added
pce_kttest 10/05/2020 12:51:23 PM

Record Changed
pce_kttest 10/05/2020 12:51:23 PM

- All fields may be used, however, the following are required:
 - Primary Program (Location)
 - First Name
 - Last Name
 - Email Address
 - Supervisor
 - Contact Types
- Click the Save an Submit New Staff Request Form

Assigned Locations

Clicking on this tab displays all the locations the staff has been assigned and allows location assignments to be added, changed and expired.

Provider Addiction Treatment Services - Outpatient Phone 231.620.5856	Location Type SA Treatment Agency Fax 231.929.4216	Address 1010 S. Garfield Ave. Traverse City, MI 49686-3434
----------------------------------------------------------------------------------------------	---------------------------------------------------------------------------	-------------------------------------------------------------------------

Affiliate / CMH: MSHN SUD

Staff Name:

Staff ID:

Staff Type:

Assigned Location:

Credential Expires On/Before:

Credential Type:

Show Active Staff Only

Exclude Contract Provider Staff

Group By: Primary Location

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Showing 1 of 1 Staff

Name	User ID	Type	Primary Location	
Test Provider, Katy (3734)	pce_kttest	Other	Addiction Treatment Services - Outpatient (13425)	New Provider Staff Request Form Change View Reset Password

5 Assigned Locations 6 Credentials

Assigned Location	Effective	Is Primary?	
Addiction Treatment Services (56)	09/24/2020		Add Staff Assigned Location Change View Delete
Addiction Treatment Services - Dakoske Hall (418)	09/24/2020		Change View Delete
Addiction Treatment Services - Detox (511)	09/24/2020		Change View Delete
Addiction Treatment Services - Outpatient (13425)	09/24/2020	Yes	Change View Delete
Addiction Treatment Services - Phoenix Hall (510)	09/24/2020		Change View Delete

- Click the [Add Staff Assigned Location](#) link; the following screen will display:

Staff Location Assignment

Staff
3734 Katy Test Provider

Assigned Location *

Is this the primary location? ⓘ

Effective Date *

Expiration Date

[Use Current Date](#) [Use Current Date](#)

Record Added
pce_kttest 11/02/2020 01:03:24 PM

Record Changed
pce_kttest 11/02/2020 01:03:24 PM

- Click the green lookup button to search for and select the assigned location OR enter the system id number of the location
- Enter the effective date of the assignment
- If this location is the primary location for the staff, click the checkbox labeled 'Is this the primary location?'
- Click the Save button

Credentials

Clicking on this tab displays all the credentials that have been documented on the staff record and allows for various types of credentials to be added, changed and expired.

Provider Addiction Treatment Services Phone 231-346-5235	Location Type Vendor Fax 231-943-2590	Address 1010 S Garfield Ave. Traverse City, MI 49686-3434
---------------------------------------------------------------------------------	--------------------------------------------------------------	------------------------------------------------------------------------

Affiliate / CMH: MSHN SUD	Staff Name: <input type="text" value="katy"/>	Staff ID: <input type="text"/>
Staff Type: <input type="text" value="*Any"/>	Assigned Location: Addiction Treatment Services (56)	Credential Type: <input type="text" value="*Any"/>
Credential Expires On/Before: <input type="text"/>	<input checked="" type="checkbox"/> Show Active Staff Only	<input type="checkbox"/> Exclude Contract Provider Staff
Group By: <input type="text" value="1"/> <input type="checkbox"/> Primary Location	<input type="button" value="Search"/>	

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Showing 1 of 1 Staff

Name	User ID	Type	Primary Location	
Test Provider, Katy (3734)	pce_kttest	Other	Addiction Treatment Services - Outpatient (13425)	New Provider Staff Request Form Change View Reset Password
5 Assigned Locations				
5 Credentials				
		Expiration	Status	Add Signature Credentials Add License Add Pin Add Taxonomy Add Certification
Certification-ASAM			Returned to Provider	Change View Delete
License-Ltd. Lic. Master's Social Worker-357159			Submitted for Approval	Change View Delete
PIN (NPI)-NPI-258963147			Submitted for Approval	Change View Delete
Signature Credentials-LMSW			Submitted for Approval	Change View Delete
Taxonomy-1041C0700X			Submitted for Approval	Change View Delete

- Click the applicable [Add](#) link for the type of credentials for the staff. There is no limit to the number or type of credentials that may be added.
- Complete each field as needed or required
- Click the Submit for Approval button; this will not be in the queue for the PIHP/CMH staff for approval

Reset Password

Provider staff with access to the Provider Portal will have the Reset Password link for all of the Provider staff with access to the PIHP/CMH EMR.

- Under the My Locations section of the Portal, click on the [Manage Staff/Contacts](#) link to the right of the location of the staff. The following screen will display:

Provider Addiction Treatment Services - Outpatient Phone 231.620.5856	Location Type SA Treatment Agency Fax 231.929.4216	Address 1010 S. Garfield Ave. Traverse City, MI 49686-3434
----------------------------------------------------------------------------------------------	---------------------------------------------------------------------------	-------------------------------------------------------------------------

Affiliate / CMH: MSHN SUD	Staff Name: <input type="text"/>	Staff ID: <input type="text"/>
Staff Type: <input type="text" value="*Any"/>	Assigned Location: Addiction Treatment Services - Outpat...	Credential Type: <input type="text" value="*Any"/>
Credential Expires On/Before: <input type="text"/>	<input checked="" type="checkbox"/> Show Active Staff Only	<input type="checkbox"/> Exclude Contract Provider Staff
Group By: <input type="text" value="1"/> <input type="checkbox"/> Primary Location	<input type="button" value="Search"/>	

[Export to Excel File](#) | [Export to CSV File](#)

Showing 9 of 9 Staff

Name	User ID	Type	Primary Location	
	sburnes Login Disabled	Provider Clinician	Addiction Treatment Services (56)	New Provider Staff Request Form Change View Reset Password
5 Assigned Locations				
3 Credentials				

The top of the screen will have several filters that can be used to narrow the list of staff. The most common and efficient filter is that Staff name.

- Enter the first few letters of the staff's first **OR** last name (not both) and then click the Search button. Anything matching the letters will display. Click the Reset Password link and the following will display:

Staff Name	Staff ID	User ID
Katy Test Provider	3734	pce_kttest

Reset Staff Password

After you click the "Reset Password" button, pce_kttest's password will be reset to pce_kttest. When pce_kttest logs in for the first time, the system will require his/her password to be changed.

Last password change date: 09/24/2020
Last login date: 10/05/2020

- Note that the new temporary password will be displayed to give to the staff for login. Click the Reset Password button. The password has not been reset.

Additional Features

➤ Filters

The Staff List screen can be filtered by the following information. Be sure to click the Search button after selecting any filters

- Staff Name
 - Staff Type
 - Credentials Expires On/Before
 - Staff ID
 - Credential Type
 - Primary Location
- Export to Excel File – by clicking this link, the filtered data on the screen will be available in an xls file in the user's system messages. Click on the envelope icon  next to the Home button at the top left of the screen.
- Export to CSV File - by clicking this link, the filtered data on the screen will be available in a CSV file in the user's system messages. Click on the envelope icon  next to the Home button at the top left of the screen.

Missing and Expired Licenses/Qualifications/Insurances

This section of the Provider Portal Dashboard will display any provider insurance policies, qualifications or license information that have expired in the system. Provider staff may submit the required information to PIHP/CMH staff for approval to update the system records.

Showing 4 of 4 Items

Provider ²	Item ³	Expiration ¹	Due in	Status	
Addiction Treatment Services - Dakoske Hall (418)	SUD License	07/31/2020	-73 days	Expired	Enter / Renew View
Addiction Treatment Services - Detox (511)	SUD License	07/31/2020	-73 days	Returned to Provider	View Change
Addiction Treatment Services - Outpatient (13425)	SUD License	07/31/2020	-73 days	Expired	Enter / Renew View
Addiction Treatment Services - Phoenix Hall (510)	SUD License	07/31/2020	-73 days	Expired	Enter / Renew View

[Export to Excel File](#)

- Click the [Enter/Renew](#) link to the right of the Status column for the item. The following screen will display (*please note the below screen shot is an example, the screen may vary depending on the specific requirements from the PIHP/CMH*):

SUD License

Provider Qualification
SUD License

Effective Date * 
[Use Current Date](#)

Expiration Date * 

Select SUD License(s)

CAIT Case Management Early Intervention Integrated Treatment Outpatient Methadone Outpatient

Problem Assistance Peer Recovery/Support Residential Residential Detox SARF

Notes

characters left: 8000 

Attachments / Uploaded Documentation

 Choose files OR Drag and drop files here

[✓ Spell Check](#)

Record Added
pce_kttest 10/13/2020 06:57:30 PM

Record Changed
pce_kttest 10/13/2020 06:57:30 PM

[Save](#) [Submit for Approval](#) [Cancel](#)

- Required fields may include:
 - Effective Date
 - Expiration Date
 - At least 1 SUD License
- Optional fields include:
 - Notes field
 - Attaching or Uploading Documentation e.g. a copy of the license
- Click the Submit for Approval button; the status for the item on the Dashboard will update to 'Submitted for Approval'

Additional Feature

- Export to Excel File – by clicking this link, the filtered and sorted data on the screen will be available in an xls file in the user's system messages. Click on the envelope icon  next to the Home button at the top left of the screen.

Document Submission Portal

This section of the Provider Portal Dashboard will display document requests for the contracted provider from the PIHP/CMH. Provider staff may submit the required information to PIHP/CMH staff for approval to update the system records.

Document Submission Portal							
Group By: <input type="checkbox"/> Provider <input type="checkbox"/> Category <input type="checkbox"/> Document Search							
Showing 5 of 5 Documents							
Provider	Document	Period Covered	Due	Due In	Submission Date	Status	
Addiction Treatment Services - Outpatient (13425)	Signed Contract Contract Document	-	10/13/2020	-6 days		Past Due	Add Document View Request
Addiction Treatment Services - Dakoske Hall (418)	Sentinel Event Submission	07/01/2020 - 09/30/2020	11/30/2020	42 days		Due Soon	Add Document

- Click the [Add Document](#) link to the right of the Submission Date column for the document. The following screen will display (*please note the below screen shot is an example, the screen may vary depending on the specific document requirements from the PIHP/CMH*):

Provider Document

Please submit ASAP

Document Date* Document Type
Contract Document: Signed Contract

[Use Current Date](#)

Provider
Addiction Treatment Services - Outpatient

Notes

characters left: 4000

Attachments / Uploaded Documentation

[Choose files](#) OR Drag and drop files here

✓ Spell Check

Record Added
pce_kttest 10/19/2020 04:29:48 PM

Record Changed
pce_kttest 10/19/2020 04:29:48 PM

- Required fields may include:
 - Document Date
 - Attaching or Uploading Documentation e.g. a copy of the contract
- Optional fields may include:
 - Notes
 - Check boxes as applicable
- Click the Submit for Approval button; the status for the item on the Dashboard will update to 'Submitted for Approval'

Missing and Expired Staff Credentials

This section of the Provider Portal Dashboard will display the status of the Provider's staff's credentials (e.g. License, NPI, Taxonomy, etc.) that are due for submission to the PIHP/CMH. Provider staff may submit the required information to PIHP/CMH staff for approval to update the system records.

- Click the [Enter/Renew](#) or [Enter](#) link to the right of the Status Date column for the credential. The following screen will display (*please note the below screen shot is an example, the screen may vary depending on the specific credential requirement from the PIHP/CMH*):

The screenshot shows a form titled "Staff PIN" with the following fields and elements:

- Issue Date ***: A date input field with a calendar icon.
- Expiration Date**: A date input field with a calendar icon.
- PIN ***: A text input field.
- PIN Type ***: A dropdown menu with "NPI" selected.
- Comments / Notes**: A large text area for entering notes.
- characters left: 4096**: A character count indicator.
- Record Added**: A message indicating the record was added by "dkatsman" on "10/19/2020 05:29:10 PM".
- Record Changed**: A message indicating the record was changed by "dkatsman" on "10/19/2020 05:29:10 PM".
- Buttons**: "Save", "Submit for Approval" (highlighted with a red box), and "Cancel".
- Spell Check**: A green button with a checkmark icon.

- Required fields may include:
 - Issue Date
- Optional fields may include:
 - Expiration Date, if needed or applicable
 - Notes
 - Credential specific checkboxes and/or dropdowns
- Click the Submit for Approval button; the status for the item on the Dashboard will update to 'Submitted for Approval'

Additional Feature

- Export to Excel File – by clicking this link, the filtered and sorted data on the screen will be available in an xls file in the user's system messages. Click on the envelope icon  next to the Home button at the top left of the screen.

Action Pending Authorizations Summary

This section of the Provider Portal Dashboard will display the status of any authorization requests that have been submitted to the PIHP/CMH.

The panel section includes the Provider/Location and the number of authorizations that are awaiting approval, returned to requester and recently approved (within the past 14 days). This summary includes the ability to drill down to the authorization details by clicking on the number link in the example below.

Action Pending Authorizations Summary			
Provider ¹	Awaiting Approval	Returned to Requester	Recently Approved ⁱ
Addiction Treatment Services - Dakoske Hall (418)	0	3	0
Addiction Treatment Services - Detox (511)	0	1	0
Addiction Treatment Services - Phoenix Hall (510)	0	2	0

[Export to Excel File](#) | [Go to Detail Report](#)

When a number is 'drilled' into the link will appear with a square and highlighted and the drill down data will be displayed immediately below.

Action Pending Authorizations Summary													
Provider ¹	Awaiting Approval			Returned to Requester			Recently Approved ⁱ						
Addiction Treatment Services - Dakoske Hall (418)	0			0			3						0
Showing 3 of 3 Rows													
Case #	Consumer First Name	Consumer Last Name	DOB	Medicaid ID	Authorization #	Request Date	Requested By	Status	Effective Date	Expiration Date	Status Date ⁱ	Approved Date	
0150736	Citlalli	ROJAS_scrambled	03/21/1993	999984858007	1802A0053507	04/06/2018	Rebecca McDermont	Returned to Requester	01/29/2018	02/01/2018	04/14/2018		
0402354	Vincenzo	ROBERTS_scrambled	10/04/1990	999970623389	1906A0120515	06/04/2019	Erin McFadden	Returned to Requester	04/15/2019	04/16/2019	06/04/2019		
0262693	Phoenix	SALAZAR_scrambled	03/13/1975	999973036336	2002A0155057	02/23/2020	Susan Connor-Herrera	Returned to Requester	02/06/2020	02/07/2020	02/24/2020		
Addiction Treatment Services - Detox (511)				0			1						0
Addiction Treatment Services - Phoenix Hall (510)				0			2						0

[Export to Excel File](#) | [Go to Detail Report](#)

Drill down data includes the following information:

- Provider
- Case #
- Consumer First Name
- Consumer Last Name
- Date of Birth
- Medicaid ID
- Authorization #
- Request Date
- Requested By
- Status
- Effective Date
- Expiration Date
- Status Date
- Approved Date

In addition, this panel also provides a link to a detail report with the above information as well export the information to an excel file for more robust analysis.

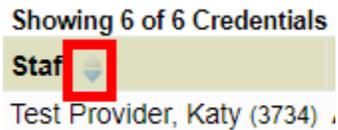
Action Pending Authorizations Summary			
Provider ¹	Awaiting Approval	Returned to Requester	Recently Approved ⁱ
Addiction Treatment Services - Dakoske Hall (418)	0	0	3
Addiction Treatment Services - Detox (511)	0	0	1
Addiction Treatment Services - Phoenix Hall (510)	0	0	2

[Export to Excel File](#) | [Go to Detail Report](#)

Other Miscellaneous Information Available for All Panels of the Provider Portal Dashboard

Sort Order Arrow

Next to each category in the Header of a dashboard section, there is a sort order arrow as shown below:



By default, it is displaying that column of information from ascending to descending order. Clicking on the arrow, reverses the order for that column. It also re-orders which column is sorted first, second, third, etc.

Column Sort Order

The sort order of the columns can be determined by the small numeric number listed next to the column dropdown.



Column Filter

 Clicking on the filter icon allows the user to select only the options needed. By default, all options are selected. The user may choose to unselect as many checkboxes as needed, then click the OK button. To apply the filters selected, click the Search button and the screen will refresh displaying only the information selected in the filter dropdown.

Tip/Information

 This is the information icon. If the mouse is hovered over it, additional information and tips for the user are displayed such as the example below:

Action Pending Authorizations Summary

Provider ¹	Awaiting Approval	Returned to Requester	Recently Approved	
Authorizations approved within the past 14 days				
Addiction Treatment Services - Dakoske Hall (418)		0	1	0
Addiction Treatment Services - Detox (511)		0	2	0
Addiction Treatment Services - Phoenix Hall (510)		0	2	0

[Export to Excel File](#) | [Go to Detail Report](#)

Group By

The Group By section in the applicable panels allows the user to select the available checkboxes to staff record requests into groups. By default, the information displayed is in a flat file, but by using these checkboxes, the information displayed will be grouped together by one or more categories. The order of the Group By checkboxes may be changed, as needed, by clicking on the checkbox to the right and dragging it with the mouse to the order preferred. For example, in the screenshot below, the user could click on Credential to select it, then move it between Staff and Provider so that the new Group By Order would be Staff Credential Provider. **Please note:** the Search button must be clicked after any change in the Group By checkboxes in order for the information displayed to be re-arranged.

Missing and Expired Staff Credentials

Group By: ⓘ Staff Provider Credential

Showing 6 of 6 Credentials

Staff ³	Provider ²	Credential ⁴	Last Ex
Test Provider, Katy (3734)	Addiction Treatment Services - Outpatient (13425)	Certification ASAM	