

Provider Portal Administration Guide

Table of Contents

Introduction.....	3
User Accounts Overview	3
Tier Structure	3
Security Roles	4
Guide Conventions.....	4
Portal Fields	4
Enter Information into a Field.....	4
Use a Drop-down List.....	5
Enter a Date.....	6
Select a Date Using the Pop-Up Calendar	6
View Help Text for a Field	6
Result Column Headings	7
Using the Breadcrumb Trail.....	7
Common Tools.....	8
Web Portal Login Page	9
Logging into Your Portal:.....	9
Log into Your Portal	9
Provider Home Page	13
Administration Menu	15
Using the Dentist List	15
Provider Office Tiers	16
Search for a Dentist/Office	17
The Dentist Detail Page	18
Creating Your Office User Accounts.....	20
Editing a User Account.....	23
Delete an Employee	25
Using the User List	26
Search for a User.....	26
Edit a User.....	27
Unlock a User	29
Reset a User Password.....	30
Delete a User.....	31

Introduction

This guide is intended for Provider Super Users only.

This training guide covers the Provider portal administration features for office administrators (Provider Super Users). If you are a Provider Super User you can add, edit, and delete users. For the other portal features, please see the Provider Portal User Guide.

User Accounts Overview

Each provider group is set up with three separate tiers. The primary Provider Super User for the provider group is responsible for setting up the users for your group and determining what access they should be allowed. This is determined based on the tier and security role you assign them. A user's Tier Assignment determines the offices and providers to which they have access. The Security Role controls what functions they are allowed to perform. The following outlines the tier structure and the security roles.

You need to decide what information your users need access to and what functions they perform before you assign them a Tier and Security Role. For information on creating your initial user accounts, see "Creating Your Office User Accounts" on page 20.

NOTE: A sole proprietary dentist office can create all the users at tier one (the business entity). A larger organization may want to create users at each of their service offices and can create a Provider Super User account at each Service Office to manage the users in that office. For more information, see "Using the User List" on page 26.

Tier Structure

A user assigned to the...	is able to access information...
Business Entity (tier 1)	for all providers at all locations. You should assign a user at this level if you want them to be able to view and/or maintain information for your entire organization (all service offices/locations) and all providers.
SO - Service Office (tier 2)	for all providers in a specific location. You should assign a user at this level if you have staff members who view and/or maintain information for a specific service office/location and the providers assigned to the specific service office/location.
Individual Dentist (tier 3)	Users are not assigned to this tier. This tier lists the individual dentists.

NOTE: Remember, Service Office users can only access information for the dentists assigned to that service office, if a user needs to access dentists at all locations, create the user at the Business Entity level regardless of where they work.

Security Roles

If a user is assigned the role of...

at the tier they have been assigned they are able to...

1 - Provider Super User

- Create and manage user accounts for staff
- Perform Member Eligibility searches
- View EOBs (Explanation of Benefits)
- Check status of Claims/Pre-authorizations/Referrals
- Enter and submit Claims, Pre-Authorizations and Referrals

2 - Provider Office User

- Perform Member Eligibility searches
- View EOBs (Explanation of Benefits)
- Check status of Claims/Pre-authorizations/Referrals
- Enter and submit Claims, Pre-Authorizations and Referrals

3 - Provider Office User, No Remit

- Perform Member Eligibility searches
- Check status of Claims/Pre-authorizations/Referrals
- Enter and submit Claims, Pre-Authorizations and Referrals

Guide Conventions

The following conventions are used throughout this training guide:

1. Notes

NOTE: All notes providing you with additional information appear in a grey box.

2. The names of fields, buttons, menus, and other elements that appear in the portal appear in **Bold Format**.

Portal Fields

The tab key allows you to move from field to field, minimizing mouse use.

NOTE: Required fields are marked with a red asterisk (*).

Enter Information into a Field

1. Move your mouse pointer over the field and click once.

NOTE: The term “click” in this guide refers to a left-click using your mouse. The term “right-click” is used when a right-click is necessary.

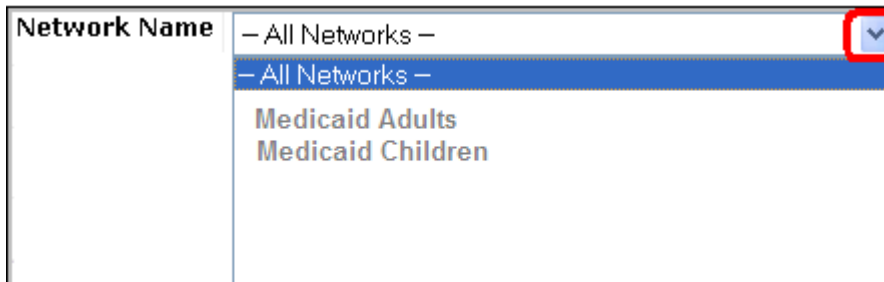
2. Once the cursor is flashing in the field, begin entering data.

NOTE: Only use the *Enter* key after you enter all the information for the current page. Hitting the *Enter* key submits the page. Use the *Tab* key or your mouse to move to the next field.

Use a Drop-down List

Many fields are configured as drop-down lists that allow you to select from a list of options.

1. Click the arrow in the field (▼) to display the drop-down list.
2. Click the option you want with your mouse.




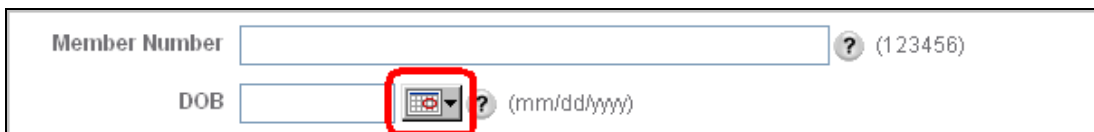
NOTE: You can use the *Down-Arrow* key to highlight the option you want, and then hit the *Tab* key to select it. You can also type the first letter of the name to move the cursor to the beginning of names that begin with that letter and then scroll from there.

Enter a Date

Enter dates in the following format: MM/DD/YYYY. For example, enter 08/20/2009 for August 20, 2009.

Select a Date Using the Pop-Up Calendar

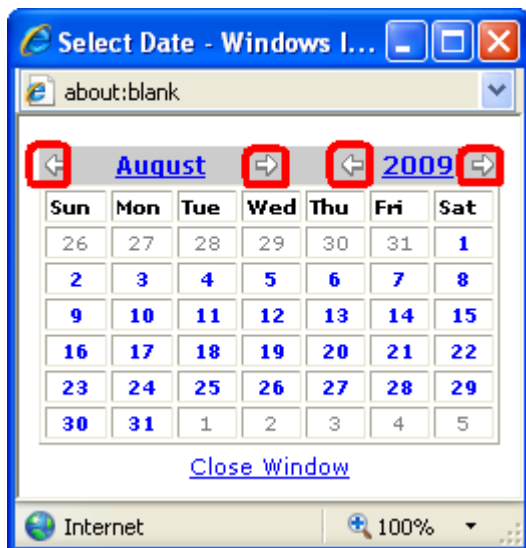
1. Click the **Calendar** icon  next to the date field for which you are selecting a date.




Member Number ? (123456)
DOB ? (mm/dd/yyyy)

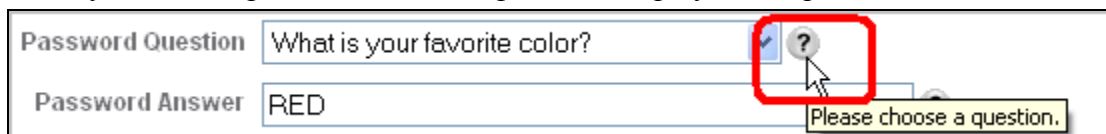
2. In the pop-up **Calendar** that appears, navigate to the date you want to select:
 - a. Click on the left or right arrow to select a month.
 - b. Click on the left or right arrow to select a year.
 - c. Click the number for the day of the month you want to select on the calendar to enter that date in the **Date** field.

The calendar closes and the **Date** field is populated with the date you selected.



View Help Text for a Field

Fields that have associated help text appear with a help icon  displayed next to the field. Move your mouse pointer over the help icon to display the help text.



Password Question What is your favorite color? ?
Password Answer RED

Please choose a question.

Result Column Headings

Many of the pages in this portal have the following structure:

1. A **Search** section
2. A **Results** section

Whenever you see a **Results** section in this portal, you can sort the information by clicking on one of the column headings. The data is sorted in alphabetical or numeric order depending on the type of data in the column.

NOTE: To reverse the order of the sort, click the column heading a second time.

The screenshot shows a 'Document List' page. At the top left is a 'Home' link. The page title is 'Document List'. Below the title is a paragraph: 'This page allows you to access the documents related to your user type. You can sort the list by document name and description. Clicking the document name displays the document.' Below this is a search section with three input fields: 'Title', 'Description', and 'File Detail Category'. A 'Search' button is located below these fields. A red box labeled '1' highlights the search section. Below the search section is a 'Results' section. It contains a table with three columns: 'Title', 'File Detail Category', and 'Description'. A red box labeled '2' highlights the table. The table contains four rows of data. At the bottom right of the table is a 'Download File' icon. At the bottom center of the page is 'Page 1 of 1'.

Title	File Detail Category	Description
Spring 2009 Newsletter	Newsletters	Spring 2009 Newsletter
Summer 2009 Newsletter	Newsletters	Summer 2009 Newsletter
W-9 Form	Forms	Request for Taxpayer Identification Number and Certification
ADA Form	Forms	*Attention: 2006 ADA Claim Form now required for all paper claim submissions!*

Using the Breadcrumb Trail

The breadcrumb trail in the upper-left corner of your page lists all of the previous pages that you have navigated through to reach the current page. Use the breadcrumb trail to return to any previous page by clicking the link for the page to which you want to return.

WARNING: Do not use your browser's **Back** button. The portal does not support the use of the browser's back button, which is why the breadcrumb trail is available for you to return to a previous page.

The screenshot shows the DentaQuest provider portal. At the top left is the DentaQuest logo. At the top right is an orange box with the text 'Dentist'. Below the logo is a blue bar with the text 'This is user id:jprovider' and links for 'Home | FAQ | Sign Out'. Below the blue bar is a breadcrumb trail: 'Home > Claim/Pre-Authorization Status Search > Claim/Pre-Authorization Status List'. The 'Home' link is circled in red. Below the breadcrumb trail is a navigation menu with 'Administration' and 'Member Detail' (which is highlighted in blue). At the bottom left, there is a partially visible 'Claims' link.

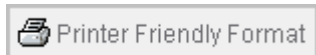
Common Tools

There are common tools you can use on various pages throughout the portal when available.

1. The **Download File** link allows you to download tables of information in a comma separated values (.csv) text file. Use *Excel* or another application that can handle (.csv) text files to view the file.
 - a. Click the **Download File** link.

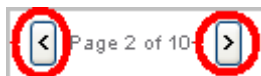


- b. In the **File Download** dialog window that appears, click **Save**.
 - c. In the **Save As** dialog window that appears, select the location where you want to save the file, change the file name if necessary, and then click **Save**.
2. The **Printer Friendly Format** link allows you to print the information on the current page in a printer friendly format.
 - a. Click the **Printer Friendly Format** link.



- A new browser window opens with the information on the current page in printer friendly format.
- b. Click **File > Print...** from the new browser window menu to print the page on your configured printer.
 3. There are navigation arrows beneath the **Results** section when the results of a search do not fit on a single page.

To navigate between pages for multi-page search results, use the left and right arrows:



[Home](#) > [Find a Dentist](#)

Dentist Directory List

This page lists providers of the type you selected. If you narrowed the list, it displays only those meeting your search criteria. Clicking a provider name displays that provider's detailed information. Clicking a map/directions link for a specific provider displays a map and directions to that provider's office. To view a version of this list suitable for printing, click the printer friendly link.

Results						
Dentist/Office Name	Network Name	Specialty	Dentist Identifier	Address	Phone	Maps
Dental Services	Medicaid	Dentist -General Practice		40 S Ave Deming, NM 88030	(575) 575-5575	Map/Directions
Dental Services	Medicaid Adults	Dentist -General Practice		40 S Ave Deming, NM 88030	(575) 575-5575	Map/Directions
Williams	Medicaid	Dentist -General Practice	55555555 (Medicaid) , DD5555 (State License) , 5555555555 (NPI)	40 S Ave Deming, NM 88030	(575) 575-5575	Map/Directions
Williams	Medicaid Adults	Dentist -General Practice	55555555 (Medicaid) , DD5555 (State License) , 5555555555 (NPI)	40 S Ave Deming, NM 88030	(575) 575-5575	Map/Directions

< Page 2 of 10+ >

[Search Again](#)

Web Portal Login Page

The **Login** page allows you to login to the Provider Portal.

Logging into Your Portal:

To login to the portal, you must have a unique username and password, which you receive from your supervisor.

NOTE: Your welcome package contains instructions for self-registering your primary Provider Super User account. Use this account to create additional Provider Super User and Provider User accounts.

Log into Your Portal

1. Use your web browser to navigate to the DentaQuest website at www.dentaquest.com.
2. Click on **Dentists** in the upper-center of the web page and choose **Dentists**.



COVID-19 Information and Resources



Oral Health Library

The first step to good oral health is information. In our oral health library, you can learn about everything from how to floss, the impact of pregnancy on dental care, and how to overcome fear of the dentist.

[Dental Health for Kids](#)

Visit our Kids Korner for information videos, interactive dental health

[Check Your Dental Risk](#)

Did you know that dental disease is preventable? Check your risk today.

- On the new page that appears, click on the **Login** and select either **Dentists in Massachusetts** or **Dentists in all other States** or click on the **Login Here** link in the Welcome Dentists section.

NOTE: If you want specific information on your state click on the state link..

The screenshot shows the DentaQuest website interface. At the top, there is a navigation bar with links for LOGIN, About Us, Contact Us, Careers, and Trading Partner, along with a 'FIND A PROVIDER' button. Below this is the DentaQuest logo and a search bar with a 'Search' button. A secondary navigation bar contains links for MEMBERS, DENTISTS, CLIENTS, BROKERS, NEWS & UPDATES, and ORAL HEALTH RESOURCES. The main content area is titled 'Welcome, Dentists' and features several sections: a welcome message, a paragraph about DentaQuest's commitment to oral health, a call to action for those not part of the network, and a section for easy access to information. This last section is divided into two columns: 'New Providers' with links for application materials and tool resources, and 'Existing Providers' with links for the web portal and update forms. A footer section for California residents is also present.

4. On the portal login page that appears, enter your username in the Username field, your password in the Password field, and then click the Login button.

NOTE: If you do not have or remember your password, you can request your password from DentaQuest with the **Forgot Password** link.

NOTE: If you are a Massachusetts provider you will also be prompted to select Provider Web Portal (PWP), Web Provider Serv. (WPS) or Provider Quest Web Portal before you reach the login page.

5. The first time you log in, you are prompted to enter a new password:

NOTE: Your password needs to be 8 to 16 characters, contain at least one upper case, one lower case and one number and/or special character. You cannot use the following special characters: (;, \, {, }, [,], ", %, ~, *, :). You are prompted to change your password every sixty days. You can not use any of your last ten passwords.

- a. Type a new password into **Password** field.
- b. Type the same password into the **Confirm Password** field.
- c. Click the **Submit** button below these fields.

6. The first time you log in, you are prompted to accept the **Web Portal Provider User Agreement**:
 - a. If you accept the term, select the **Yes, I agree with the statement** option.
 - b. Click the **Next** button.

Your **Home** page appears after a successful login.



Terms and Conditions

 [Printer Friendly Format](#)

WEB PORTAL PROVIDER USER AGREEMENT

This agreement ("Agreement") is by and between "Dental Provider" and DentaQuest, LLC, which includes its affiliates ("DentaQuest"), and is made effective on the date last signed below.

RECITALS

1. DEFINITIONS

2. DENTAQUEST OBLIGATIONS

3. DENTAL PROVIDER OBLIGATIONS

4. MISCELLANEOUS PROVISIONS

When you agree to this statement, your agreement will be time and date stamped and will become the date this Agreement is effective between the parties.

In order to continue, you must agree with the statement.

Yes, I agree with the statement
 No, I do not agree with the statement

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 CPT® codes, descriptions and other data only are copyright 2010 American Medical Association. All rights reserved.
 CPT® is a registered trademark of the American Medical Association(AMA).

Copyright © 2010 DentaQuest

Provider Home Page

The **Home** page has the following elements:

1. **Portal Menus** – The **Administration**, **Claims/Pre-Authorizations**, **Patient**, **Tools**, **Privacy Policy**, and **Provider User Agreement** menus are displayed along the left side of the **Provider** portal.
2. **Welcome** – This section contains the DentaQuest welcome message.
3. **Plan Messages** – This section contains any plan messages from DentaQuest to your plan. You can access message details when available by clicking the message link.
4. **Health News** – This section contains information and news articles of interest. You can access the news articles by clicking on their respective links.
5. **My Health Tools/Resources** – This section links to various health resources.
6. **Contact** – This section contains DentaQuest's contact information.
7. **Message Center** – This section contains messages sent to you from DentaQuest.

NOTE: The **Message Center** only appears on your **Home** page if there are messages in your **Inbox**.

8. **FAQ** – This link opens the **View FAQ** page where you can view frequently asked questions.
9. **Sign Out** – This link signs you out when you are done.
10. **Event Calendar** – This link opens the **Event Calendar**.
11. **Related Documents** – This link opens the Document List page.

DentaQuest **Dentist**

This is user id:jprovider [Home](#) | [FAQ](#) | [Sign Out](#)

Administration

Claims/Pre-Authorizations/Referrals

Patient

Tools

Privacy Policy

Provider User Agreement

Welcome 8

Welcome South Carolina Dentist!

Plan Messages 3

» [Network Rates](#)

Health News 4

» [Oral Health News - 12/17/2009](#)

My Health Tools / Resources 5

[American Dental Association](#)

[National Association of Dental Plans](#)

Contact 6 10

Provider Relations Telephone Numbers

All DentaQuest Providers: 1.800.341.8478

General Telephone Numbers

Toll Free
1.800.417.7140

Local
1.262.241.7140


Hearing Impaired Line
1.800.466.7566

Utilization Management
1.800.294.9650

Report Fraud
1.800.237.9139

Message Center 7 (Inbox) You have 2 new messages!

From	Subject	Received
DentaQuest Customer Service	Your Inquiry Status	12/10/2009
DentaQuest Customer Service	Your message to Contact DentaQuest	12/10/2009



9

» [Event Calendar](#)

» [Related Documents](#)

11

1

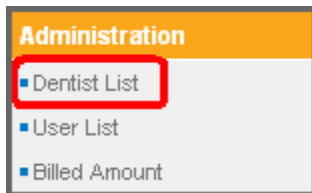
Administration Menu

Click the **Administration** menu on the left-side of the page to display the following menu items:

- **Dentist List** – use this menu item to search for and select provider offices or specific dentists that are affiliated with your business entity depending on your Tier Assignment (you can only view your assigned tier and below). Provider Super Users can add and edit users via the **Dentist List**.
- **User List** (Provider Super Users Only) – use this menu item to view and edit user accounts for the tier to which they belong. Use the **Dentist List** to edit user accounts at a lower tier.
- **Billed Amount** – use these menu items to add and associate billed amount lists. See the “DQ Provider Portal User Guide” for more information.

Using the Dentist List

The **Administration > Dentist List** menu item allows you to open the **Dentist List** page and search for and select a location or specific dentist.



Home

Dentist List

This page allows you to search for and select a service provider. By default all providers are listed. To narrow the list, enter search criteria. If displayed during a selection process, clicking the select link next to the provider number selects that provider. Clicking the provider name displays detailed information for the selected provider.

Search Download File Printer Friendly Format

Dentist Last Name/Office Name

Dentist First Name

Specialty (Dental Hygienist is only applicable to NM)

Networks

City

State

Results

Dentist Identifier	Dentist Office Name	Specialty	Network Name	Address	Phone
5555555555 (NPI), 5555555555 (EIN)	Dental Services		Medicaid Children	555 Dental Ave, Deming, NM 88030	(555) 555-5555
	Dental Practice1	Dentist-General Practice	Medicaid Children	555 Dental Ave, Deming, NM 88030	(555) 555-5555
	Dental Practice1	Dentist-General Practice	Medicaid Adults	555 Dental Ave, Deming, NM 88030	(555) 555-5555
	Dental Practice2	Dentist-General Practice	Medicaid Children	803 State Ave, Deming, NM 88030	(575) 555-5575
	Dental Practice2	Dentist-General Practice	Medicaid Adults	803 State Ave, Deming, NM 88030	(575) 555-5575
5555555555 (NPI), 5555555555 (Medicaid), DD5555 (State License)	Dentist_Dentist1	Dentist-General Practice	Medicaid Children	555 Dental Ave, Deming, NM 88030	(555) 555-5555
5555555555 (NPI), 5555555555 (Medicaid), DD5555 (State License)	Dentist_Dentist1	Dentist-General Practice	Medicaid Adults	555 Dental Ave, Deming, NM 88030	(555) 555-5555
5555555555 (NPI), 5555555555 (Medicaid), DD5555 (State License)	Dentist_Dentist2	Dentist-General Practice	Medicaid Children	803 State Ave, Deming, NM 88030	(575) 555-5575
5555555555 (NPI), 5555555555 (Medicaid), DD5555 (State License)	Dentist_Dentist2	Dentist-General Practice	Medicaid Adults	803 State Ave, Deming, NM 88030	(575) 555-5575

Provider Office Tiers

The tiers are listed on the **Dentist List** page:

NOTE: This is one of the main differences between the **Dentist List** and the **Find a Dentist** pages. The **Find a Dentist** page never shows Business Entity (Tier 1) information.

1. Business Entity

This is considered Tier 1 and users created for the business entity office can see and access provider information for all office locations, so they see all three tiers.

The business entity appears on the **Dental List** page with an EIN/NPI as a **Dentist Identifier** and has no **Network Name**.

2. Service Office/Location

This is considered a Tier 2 level and users created for a service office can only see and access provider information and dentists assigned to that location, so they will not see tier 1 (the business entity) or other tier 2 service offices.

A service office appears on the **Dental List** page with a **Network Name** (which is how you can tell a service office from a business entity). If a service office has an NPI, it is a type 2 NPI (also known as a subpart NPI).

3. Individual Dentist

Individual dentists are considered Tier 3.

A dentist appears on the **Dental List** page with any relevant IDs, such as a state license, NPI (National Provider Identifier), Medicaid and Medicare IDs listed in the **Dentist Identifier** column.

NOTE: The service offices/locations and individual dentists are listed by network, so for a single service office or dentist an entry appears for each network that they are affiliated with. These links take you to the same service office or dentist details page.

Dentist Identifier	Dentist Office Name	Specialty	Network Name	Address	Phone
555555555 (NPI), 555555555 (EIN)	Dental Services		Medicaid Children	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
2 →	Dental Practice1	Dentist-General Practice	Medicaid Children	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
	Dental Practice1	Dentist-General Practice	Medicaid Adults	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
	Dental Practice2	Dentist-General Practice	Medicaid Children	803 State Ave, Deming, NM. 88030	(575) 555-5575
	Dental Practice2	Dentist-General Practice	Medicaid Adults	803 State Ave, Deming, NM. 88030	(575) 555-5575
555555555 (NPI), 55555555 (Medicaid), DO5555 (State License)	Dentist_Dentist1	Dentist-General Practice	Medicaid Children	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
555555555 (NPI), 55555555 (Medicaid), DO5555 (State License)	Dentist_Dentist1	Dentist-General Practice	Medicaid Adults	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
555555555 (NPI), 55555555 (Medicaid), DO5555 (State License)	Dentist_Dentist2	Dentist-General Practice	Medicaid Children	803 State Ave, Deming, NM. 88030	(575) 555-5575
555555555 (NPI), 55555555 (Medicaid), DO5555 (State License)	Dentist_Dentist2	Dentist-General Practice	Medicaid Adults	803 State Ave, Deming, NM. 88030	(575) 555-5575

Search for a Dentist/Office

1. If you see the **Dentist/Office Name** link you are looking for in the **Results** section, click on it to open the **Dentist Detail** page and view details for that office or dentist. Otherwise continue to search for the dentist or office you want.
2. On the **Dentist List** page, none of the search fields are mandatory, so type in as much information as you need to narrow down your search results. By default all results initially appear in the list.
 - If you know the dentist’s last name or the name of the dental office, type it into the **Dentist Last Name/Office Name** field.
 - If you know the dentist’s first name, type it into the **Dentist First Name** field.
 - You can select the network from the **Network Name** drop-down list.
 - You can type the city into the **City** field.
 - You can select the state from the **State** drop-down list.
3. Click the **Search** button.

The screenshot shows a search form with the following fields:

- Dentist Last Name/Office Name**: Text input field with a help icon.
- Dentist First Name**: Text input field.
- Specialty**: Drop-down menu with a help icon and a note "(Dental Hygienist is or)".
- Networks**: Drop-down menu with the selected option "- All Networks -".
- City**: Text input field with a help icon.
- State**: Drop-down menu with a help icon.

 At the bottom center of the form is a **Search** button, which is highlighted with a red rectangular box.

4. Click a **Dentist/Office Name** link to open the **Dentist Detail** page and view details for that office or dentist.

The screenshot shows a table of search results with the following columns: Dentist Identifier, Dentist Office Name, Specialty, Network Name, Address, and Phone. The table contains several rows of data. The link **Dentist, Dentist1** in the second column of the fifth row is highlighted with a red rectangular box.

Dentist Identifier	Dentist Office Name	Specialty	Network Name	Address	Phone
555555555 (NPI), 555555555 (EIN)	Dental Services		Medicaid Children	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
	Dental Practice1	Dentist-General Practice	Medicaid Children	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
	Dental Practice1	Dentist-General Practice	Medicaid Adults	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
	Dental Practice2	Dentist-General Practice	Medicaid Children	803 State Ave, Deming, NM. 88030	(575) 555-5575
	Dental Practice2	Dentist-General Practice	Medicaid Adults	803 State Ave, Deming, NM. 88030	(575) 555-5575
555555555 (NPI), 55555555 (Medicaid), DD5555 (State License)	Dentist, Dentist1	Dentist-General Practice	Medicaid Children	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
555555555 (NPI), 55555555 (Medicaid), DD5555 (State License)	Dentist, Dentist1	Dentist-General Practice	Medicaid Adults	555 Dental Ave, Deming, NM. 88030	(555) 555-5555
555555555 (NPI), 55555555 (Medicaid), DD5555 (State License)	Dentist, Dentist2	Dentist-General Practice	Medicaid Children	803 State Ave, Deming, NM. 88030	(575) 555-5575
555555555 (NPI), 55555555 (Medicaid), DD5555 (State License)	Dentist, Dentist2	Dentist-General Practice	Medicaid Adults	803 State Ave, Deming, NM. 88030	(575) 555-5575

The Dentist Detail Page

This page contains the following sections (use the scroll-bar to view all sections):

NOTE: The information shown for each section varies depending on the tier you are viewing (business entity, service office, or individual dentist).

- **General Information** – This section lists all the general information for a dentist, service office, or business entity.
- **Provider Identifiers** – This section lists any provider identifiers for a dentist or business entity (Medicaid/Medicare IDs, State License, NPI, and EIN) and whether or not an identifier is the primary identifier for HIPAA requirements.

NOTE: The service office does not usually have any identifiers.

- **Provider Languages** – This section lists the languages for a dentist or service office and whether it's their primary language. It has no entries for a business entity. Click a **Language** link to view language details on the **Provider Language Detail** page.

NOTE: For a service office, all the languages for the dentists in that office are listed.

- **Specialties & Certifications** – This section lists all the specialties and certificates for a dentist or service office. It has no entries for a business entity. Click a **Specialties & Certifications** link to view the associated web site outside of the portal. For example, click the [ABO](#) link to see The American Board of Orthodontics' website.

NOTE: For a service office, all the specialties for the dentists in that office are listed.

- **Provider Locations** – This section lists the office location(s) for a dentist with basic details and contact information. When you are viewing a business entity or service office, it lists that location. Click an **Office Name** link to view location details on the **Provider Location Detail** page.
- **Provider Affiliations** – If you are viewing a business entity, this section lists all the service offices. If you are viewing a service office, it lists all the dentists in that service office. It has no entries for a dentist.
- **Business/Service Office** – If you are looking at a dentist, this section lists the service office(s) for that dentist. If you are looking at a service office, it lists the business entity. It has no entries for a business entity.
- **Patient Restrictions** – When you are looking at a dentist, this section lists any restrictions the dentist has on accepting patients for each of their networks. It has no entries for a business entity or service office.
- **Provider Employees** – This section lists the employees at this business entity or service office/location. Click a **Name** link to view an employee's details on the **Dentist Employee Detail** page.

NOTE: Users are not currently added at the individual dentist (tier 3) level, so this section should have no entries when viewing a dentist.

- **User Account Information** – This section only appears for an individual dentist at tier 3. It is used to display the user account information for the selected dentist you are viewing, but since we are not currently adding users at tier three, it should be blank.

[Home](#) > [Dentist List](#)

Dentist Detail

This page allows you to view detailed information for the selected Dentist/Service Office. The view panel roster link allows you to see a list of members who have selected this dentist as PCP.

General Information [View Panel Roster](#)

Dentist Last Name/Office Name **Smith**

Dentist First Name **Joan**

Middle Name

Suffix

Title

Gender **FEMALE**

DOB **04/04/1970** ?

EIN

Degree **DDS**

Tax Information

Phone

Fax

Email

URL

Provider Identifiers

Identifier	Type	HIPAA Primary	Specialty	Location
12345	State License	N		
1212121212	NPI	Y		

Provider Languages

Language	Use of Language	Is Primary
Spanish		N

Specialties & Certifications

Check the most current board certification status by going to the [ABOMS](#) or [ABQ](#) web sites.

Specialty	Certification Status	Certification Date	Board Certified	Board Name
General Practitioner		01/01/1900		

Provider Locations

Office Name	Address	Address 2	City	State	Zip Code	Contact Name	Office Telephone
Smith Dental	10 Main Street		El Paso	TX	79925		(555) 555-5555
Smith Dental	15 Elm Street		El Paso	TX	79912		(555) 555-5555

Provider Affiliations

Name	Provider No	Affiliated Location	Effective Date	Expiration Date
No results found.				

Business/Service Office

Name	Affiliated Location	Effective Date	Expiration Date
Smith Dental	10 Main Street El Paso, TX 79925	06/15/2007	12/31/9999
Smith Dental	15 Elm Street El Paso, TX 79925	06/15/2007	12/31/9999

Patient Restrictions

Benefit Plan	Provider Taxonomy	Network Name	Line Of Business Name	Location	Affiliation	Patient Age Range	Accepting Patient
		Network A		10 Main Street El Paso, TX 79925		0-999	Accepting New and Existing Patients
		Network B		15 Elm Street El Paso, TX 79925	<input type="checkbox"/>	0-999	Accepting New and Existing Patients

Provider Employees [Add Employee](#)

Name	Title/Position	Telephone
No results found.		

User Account Information [Create User Account](#)

No provider employee login account is established.

Creating Your Office User Accounts


Only Provider Super Users can create new user accounts. You need to create an employee record before you create a user account. The following procedure walks you through creating your business entity and service office user accounts.

1. From the **Dentist List** page, select the Business Entity office or the Service Office where you are adding users.

NOTE: Remember, Service Office users can only access information for the dentists assigned to that service office, if a user needs to access all dentist information, create the user at the Business Entity level regardless of where they work.

2. On the **Dentist Detail** page, click the **Add Employee** link in the upper-right corner of the **Provider Employees** section.

The Add Provider Employee page appears.

Provider Employees			 Add Employee
Name	Title/Position	Telephone	
Smith, Jane	Administration	(123) 123-4567	

3. Type in the employee's last name and first name in the required **Last Name** and **First Name** fields.

NOTE: The other fields are optional and are not required by DentaQuest.

4. Click the **Submit** button to add the new employee. The **Provider Employee Detail** page appears for that employee.

[Home](#) > [Dentist List](#) > [Dentist Detail](#)

Add Provider Employee

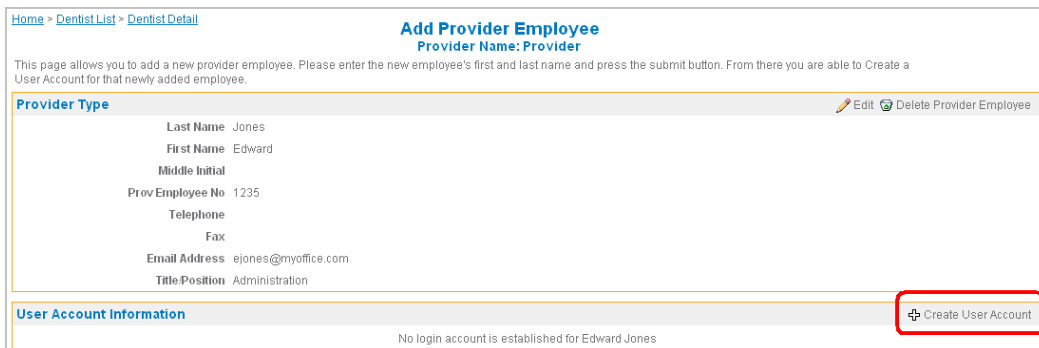
Provider Name: Provider, D.M.D., MD

This page allows you to add a new provider employee. Please enter the new employee's first and last name and press the submit button. From there you are able to Create a User Account for that newly added employee.

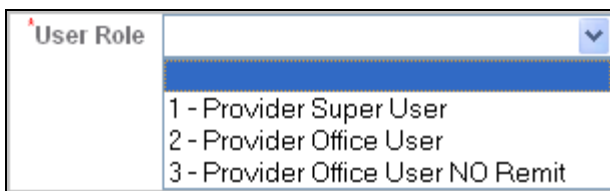
Provider Type	
*Last Name	<input type="text"/>
*First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Prov Employee No	<input type="text"/>
Telephone	<input type="text"/>
Fax	<input type="text"/>
Email Address	<input type="text"/>
Title/Position	<input type="text"/>

*Required Fields

- In the upper-right corner of the **User Account Information** section, click the **Create User Account** link. The **Add User** page appears with the user’s first and last name pre-populated from the employee record you created.



- Select a user role for this employee’s account from the User Role drop-down list. For more information, see “Security Roles” on page 4.



- Enter a user ID for the employee in the **User ID** field (3-18 characters).
- Type in an initial password for the employee in the **Password** field.

NOTE: Your password needs to be 8 to 16 characters, contain at least one upper case, one lower case and one number and/or special character. You cannot use the following special characters: (;, \, {, }, [,], ", %, ~, *, :). You are prompted to change your password every sixty days. You cannot use any of your last ten passwords.

- Type the initial password into the **Confirm Password** field.
- Type the employee’s email address into the **Email** field.
- Click the **Submit** button to create the user account.

NOTE: Make sure you pass on the **User ID** and **Password** to the employee who is going to use this user account. They will have the option to change their password, security question, and e-mail address once they logon.

- Repeat this procedure for each office user you need to create.

[Home](#) > [Dentist List](#) > [Dentist Detail](#) > [Add Provider Employee](#)

Add User

This page steps you through definition of a new user.
The following are the basic steps:

Select User Type and click Next. Depending on the user type, the following pages displays:

- Client > client page
- Health Plan > health plan offices
- Dentist Employee > dentist list

2- Select the office that the new user is to be associated with, then select a user.

3- Enter required information needed to complete the account and click submit.

User Information

*User Last Name	<input type="text" value="Jones"/>	?
*User First Name	<input type="text" value="Edward"/>	
Middle Name	<input type="text"/>	?
*User Role	<input type="text" value=""/>	
*New Password	<input type="password"/>	?
*Confirm New Password	<input type="password"/>	?
*Confirm Password	<input type="password"/>	?
*Password Question	<input type="text" value=""/>	
*Password Answer	<input type="password"/>	
*Email	<input type="text" value="ejones@myoffice.com"/>	?

Preferences **[THIS SECTION IS NOT CURRENTLY USED]**

Preference	Selected
No results found.	

*Required Fields

Editing a User Account

Only Provider Super Users can edit user accounts.

1. From the **Dentist List** page, select the Business Entity office or Service Office for the employee user account you want to edit.
2. In the **Providers Employee** section, select the **Name** link for the user you want to edit.

Provider Employees + Add Employee		
Name	Title/Position	Telephone
Jones, Edward		

3. In the **Provider Employee Detail** page that appears, click the **Edit User Account** link in the upper-right corner of the **User Account Information** section to edit this user account. The **Edit User** page appears.

[Home](#) > [Dentist List](#) > [Dentist Detail](#)

Provider Employee Detail

Provider Name: Deming Dental Services

You can delete the Provider Employee or Create/Edit a User Account for this employee

Provider Type ✎ Edit

Last Name Jones
First Name Edward
Middle Initial
Prov Employee No
Telephone
Fax
Email Address
Title/Position

User Account Information ✎ Edit User Account

User ID ejones
User Role Provider Office User
Contact E-mail ejones@myoffice.com

4. Edit the fields with the changes you need to make for this user account:
 - To change the user’s role, select the new role for this user from the **User Role** drop-down list.
 - To change the user’s password question, select a new password question from the **Password Question** drop-down list and type a new answer for the password question into the **Password Answer** field.
 - To lock a user out of the system, select **Yes** in the **Locked** drop-down list.
 - To delete a user, select **Yes** in the **Deleted** drop-down list.
 - To edit the user’s email address, type the new email address into the **Email** field.
5. Click the **Submit** button. Your changes are saved in the system.

[Home](#) > [Dentist List](#) > [Dentist Detail](#) > [Provider Employee Detail](#)

Edit User

This page allows you to change a user's name, email address, preference, role and verbose level. Click submit to save the revised information.

User Information

*User Last Name ?

*User First Name

Middle Name ?

User ID ejones

*User Role ▾

*Password Question ▾

*Password Answer

*Email ?

Office Dental Services

*Locked ▾ ?

*Deleted ▾ ?

Preferences

Preference	Selected
No results found.	

Campaigns

Name	Participating
No results found.	

*Required Fields

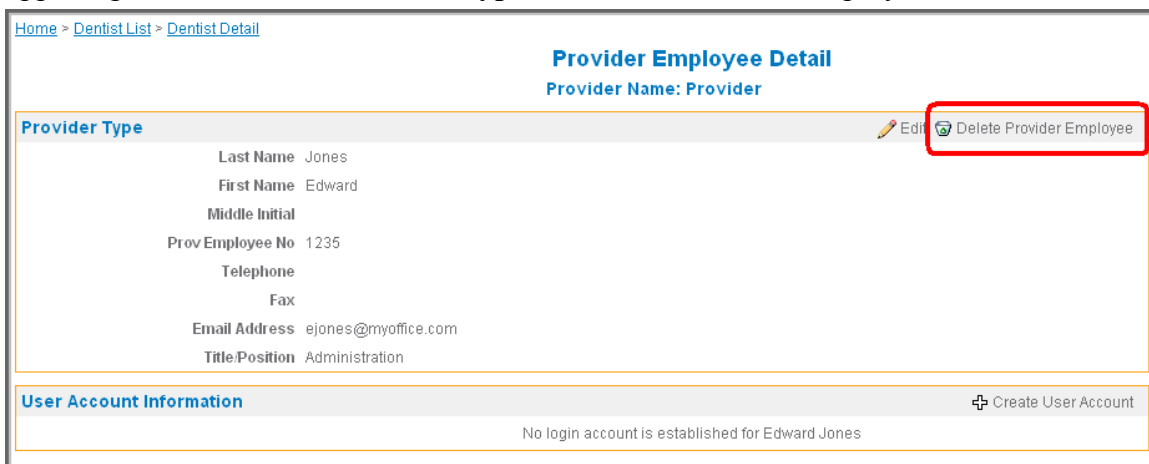
Delete an Employee

Before you can delete an employee, you must delete their user account if they have one configured. See “Editing a User Account” on page 23.

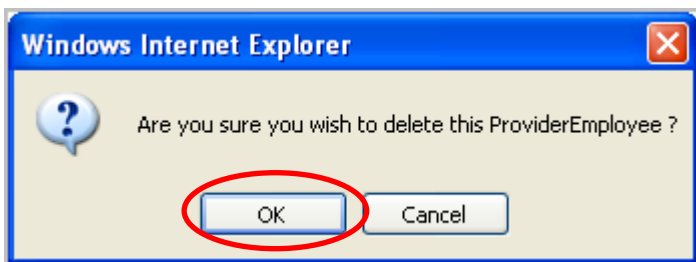
1. In the **Provider Employees** section of the **Dentist Detail** page, click the name link for the employee you want to delete.



2. In the **Provider Employee Detail** page that appears, click **Delete Provider Employee** in the upper-right corner of the **Provider Type** section to delete this employee.

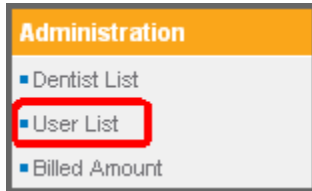


3. In the pop-window that appears, click **OK** to delete the employee.



Using the User List

Only Provider Super Users see this menu item. The **Administration > User List** menu item allows a Provider Super User to open the **User List** page and search for and select a user. A business entity Provider Super User can access all users; a service office Provider Super User can only access all the users in their service office.



Search for a User

1. Select the **Administration > User List** menu item from the portal menus on the left side of the page.
2. None of the search fields are mandatory, so type in as much information as you can to narrow down your search results:
 - If you know the user’s last name, type it into the **User Last Name** field.
 - If you know the user’s user ID, type it into the **User ID** field.
 - If you are searching for a user with a specific role, select that role from the **Role** drop-down list.
 - If you are searching for a user that is locked out of the system, select **Yes** in the **Locked** drop-down list.
 - If you are searching for a deleted user, select **Yes** in the **Deleted** drop-down list.
3. Click the **Search** button. Your search results appear in the **Results** section.
 - Click a **Name** link to view details for that user on the **User Detail** page.
 - Click the **Delete** link on the row for a user in the **Results** section to delete a user.

The screenshot shows the 'User List' page. At the top, there is a 'Home' link and the title 'User List'. Below the title is a descriptive paragraph: 'This page lists all the users defined in your office. To narrow the list, you can sort the list by last name, username, or role. You can add users to the list by clicking the add link. Names in the results list link to the user's detail page from where you can edit the user information, reset the user's password, or delete the user.'

The search section contains the following fields:

- User Last Name:
- User ID:
- User Role:
- Locked:
- Deleted:

A red circle highlights the 'Search' button.

The results section is titled 'Results' and includes a 'Download File' icon and an 'Add User' link. It contains a table with the following data:

Name	User ID	Office	Role	Locked	Lockout Time	Deleted
Jones, Edward	ejones	Dental Services	Provider Office User	N		Delete
Smith, Jane	jsmith1	Dental Services	Provider Super User	N		Delete

Edit a User

This includes changing a user’s name, e-mail address, their user role, their password question, as well as locking, unlocking, deleting, and un-deleting their account.

1. Find the user you want to edit, see “Search for a User” on page 26.
2. Click the **Name** link to view the **User Detail** page for the user you want to edit.

Results							Download File	Add User
Name	User ID	Office	Role	Locked	Lockout Time	Deleted		
Jones, Edward	ejones	Dental Services	Provider Office User	N		N	Delete	
Smith, Jane	jsmith1	Dental Services	Provider Super User	N		N	Delete	

3. In the **User Detail** page that appears, click the **Edit User** link in the upper-right corner of the **User Information** section to edit this user account.

[Home](#) > [User List](#)

User Detail

This page allows you to view details for the selected user. You can edit or delete the user and reset the user's password.

User Information
[Reset Password](#)
[Edit User](#)
[Delete User](#)

Name Jones, Edward

User ID ejones

Role Provider Office User

Password Question What is your favorite color?

Password Answer BLUE

Email ejones@myoffice.com

Office Dental Services

Locked N

Deleted N

Preferences

Preference	Selected
No results found.	

Campaigns

Name	Participating
No results found.	

4. On the **Edit User** page that appears, edit the fields with the changes you need to make for this user account:

NOTE: You can never edit the user’s **User ID**.

- To edit the user’s name, type in any changes into the **User Last Name**, **User First Name**, and **Middle Name** fields.
- To change the user’s role, select the new role for this user from the **User Role** drop-down list.
- To change the user’s password question, select a new password question from the **Password Question** drop-down list and type a new answer for the password question into the **Password Answer** field.
- To lock a user out of the system, select **Yes** in the **Locked** drop-down list.

- To unlock a user, change the **Yes** to **No** in the **Locked** drop-down list; you would have selected **Yes** in this field when searching to find locked user accounts.
 - To delete a user, select **Yes** in the **Deleted** drop-down list.
 - To un-delete a user, change the **Yes** to **No** in the **Deleted** drop-down list; you would have selected **Yes** in this field when searching to find deleted user accounts.
 - To edit the user’s email address, type the new email address into the **Email** field.
5. Click the **Submit** button to save your changes for this user.

[Home](#) > [Dentist List](#) > [Dentist Detail](#) > [Provider Employee Detail](#)

Edit User

This page allows you to change a user's name, email address, preference, role and verbose level. Click submit to save the revised information.

User Information

*User Last Name ?

*User First Name

Middle Name ?

User ID ejones

*User Role ▼

*Password Question ▼

*Password Answer

*Email ?

Office Dental Services

*Locked ▼ ?

*Deleted ▼ ?

Preferences

Preference	Selected
No results found.	

Campaigns

Name	Participating
No results found.	

*Required Fields

Unlock a User

1. Click the **Tools > User List** menu item in the Portal Menus on the left side of the page.
2. Find the user you need to unlock, see “Search for a User” on page 26.

NOTE: Select “Yes” in the **Locked** drop-down list to search for locked users.

3. Click the **Name** link to view the **User Detail** page for that user.

Results								Download File	+ Add User
Name	User ID	Office	Role	Locked	Lockout Time	Deleted	User Status		
juston, juston	justonprovider	Dental Services	1 - Provider Super User	N		N	ACTIVE		

4. Click the **Unlock** link.

The user is now unlocked.

[Home](#) > [User List](#)

User Detail

This page allows you to view details for the selected user. You can edit or delete the user and reset the user's password.

User Information Reset Password **Unlock** Edit User Delete User

Name Jones, Edward

User ID ejones

Role Provider Office User

Security Question What is your favorite color?

Security Answer BLUE

Email ejones@myoffice.com

Office Dental Services

Locked Y

Deleted N

Preferences [THIS SECTION IS CURRENTLY NOT USED]

Preference	Selected
No results found.	

Campaigns [THIS SECTION IS CURRENTLY NOT USED]

Name	Participating
No results found.	

Reset a User Password

NOTE: A user can change their own password from their User Profile; see the Client Portal User Guide for more information.

1. Find the user you are resetting a password for, see “Search for a User” on page 26.
2. Click the **Name** link to view the **User Detail** page for that user.

Results							Download File	Add User
Name	User ID	Office	Role	Locked	Lockout Time	Deleted		
Jones, Edward	ejones	Dental Services	Provider Office User	N		N	Delete	
Smith, Jane	jsmith1	Dental Services	Provider Super User	N		N	Delete	

3. Click the **Reset Password** link.

Home > [User List](#)

User Detail

This page allows you to view details for the selected user. You can edit or delete the user and [reset the user's password](#).

User Information

[Reset Password](#) [Edit User](#) [Delete User](#)

Name Jones, Edward
User ID ejones
Role Provider Office User
Password Question What is your favorite color?
Password Answer BLUE
Email ejones@myoffice.com
Office Dental Services
Locked N
Deleted N

Preferences

Preference Selected
 No results found.

Campaigns

Name Participating
 No results found.

4. On the **Reset User Password** page that appears, click the **Reset Password** button. A password is randomly generated and appears in the **New Password** field.

NOTE: The user will receive an e-mail with their temporary password, and they will be prompted to change the password the next time they log in.

5. Click the **Submit** button to save the new password for this user. The user receives the new password in an email message.

Home > [User List](#) > [User Detail](#)

Reset User Password

This page allows health plan users to reset a user's password. If granted permission, provider employees and employers can perform this operation. Clicking submit activates the new password. The current password remains in effect if you click cancel.

Password Information

User ID ejones
Password Question What is your favorite color?
Password Answer BLUE
Reset Password
New Password k5ElgOU0
Submit **Cancel**

Delete a User

1. Find the user you want to delete, see “Search for a User” on page 26.
2. Click the **Delete** link on the row for the user in the **Results** section.

Results							Download File	Add User
Name	User ID	Office	Role	Locked	Lockout Time	Deleted		
Jones, Edward	ejones	Dental Services	Provider Office User	N		N	Delete	
Smith, Jane	jsmith1	Dental Services	Provider Super User	N		N	Delete	

3. On the **Delete User** page that appears, click the **Delete** button at the bottom of the page. The user is deleted.

[Home](#) > [User List](#)

Delete User

This page allows Health Plan users to remove a user from the database; the user will no longer be able to use the system. If granted permission, Provider Employees and Employers can perform this operation. Members with active benefits cannot be removed, and you cannot delete your own user account.

User Information

Name	Jones, Edward
User ID	ejones
Role	Provider Office User
Password Question	What is your favorite color?
Password Answer	BLUE
Email	ejones@myoffice.com
Office	Dental Services
Locked	N
Deleted	N

NOTE: This procedure deletes a user account, but can be reversed. If you want to delete an employee record completely, see “Delete an Employee” on page 25.