JOB AID
Prepaid Health Plan (PHP) Operations Portal Access

OVERVIEW

Once a Prepaid Health Plan (PHP) Atypical provider record has been successfully added to the NCTracks Operations Portal, authorized users will have the ability to view and update the provider's PHP data. This Job Aid provides instructions for updating provider PHP data in the NCTracks Operations Portal.

OBJECTIVES

This Job Aid will assist PHP providers with the following:

- Accessing the NCTracks Operations Portal
- Identifying editable PHP data fields
- Updating provider PHP data

ACCESSING THE NCTRACKS OPERATIONS PORTAL

NCTracks is a web-based tool that provides secure access to provider enrollment records. Operations Portal authorized users will have the ability to view and update PHP data.

PHP users will have one of the following two roles assigned:

- PHP Provider Read – This user role will have read-only access to the PHP pages.
- PHP Provider Update – This user role will have update access to the PHP pages.

Note: PHPs may have multiple users within their organization. Every user that will have NCTracks responsibilities will need their own access credentials. There should be no sharing of access credentials.

MULTI-FACTOR AUTHENTICATION (MFA)

All Fiscal Agent Operations (FA Ops) users will be required to adhere to Multi-Factor Authentication (MFA) when accessing NCTracks. MFA second level authentication works by placing a confirmation phone call to the user's phone during the NCTracks login process.

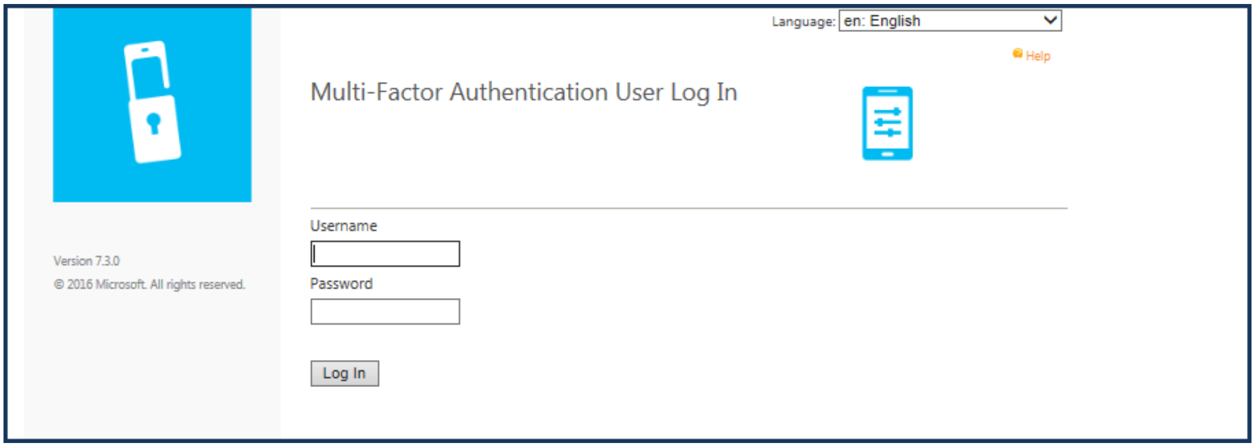
This requirement will be for any user of the NCTracks Operations Portal, including CSRA employees, State employees, and other users such as Local Management Entities (LMEs) and PHPs.

Enrolling in MFA

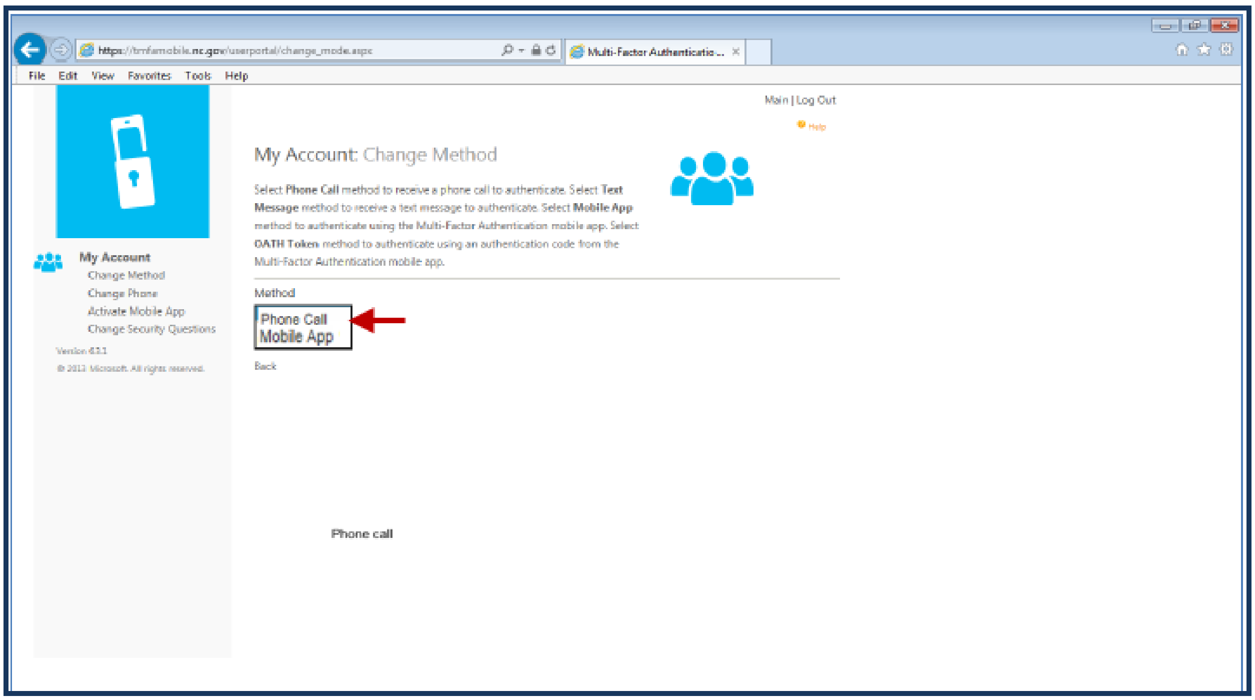
NCTracks Operations Portal users will need to navigate to the State MFA Portal in order to identify the method of second level authentication notification. This site will assist the user with either identifying the primary and secondary phone numbers that will be receiving the confirmation phone call or, if selected, activating the mobile app option.

Navigate to https://mfaportal.nc.gov/nctracksmfa/.

Enter the NCTracks NCID (username) and password and select **Log In**.



This screen allows the user to select a method for receiving the second level authentication notification. There are currently two options available: **Phone Call** and **Mobile App**.



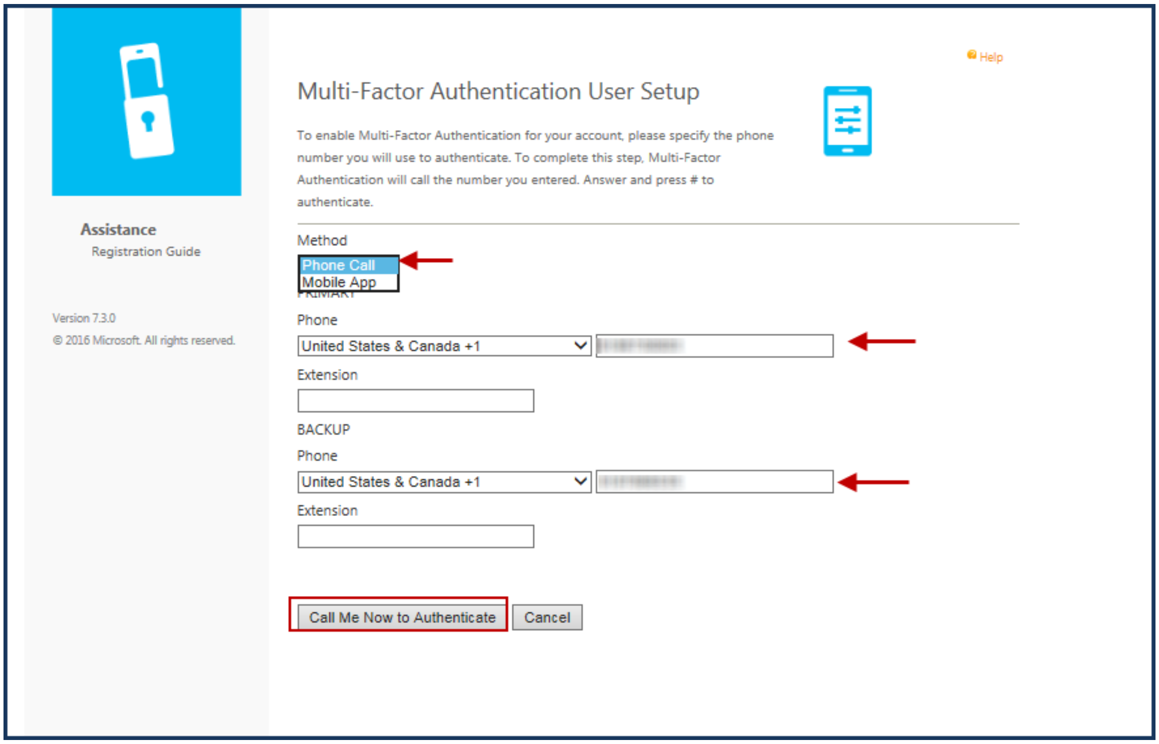
Phone Call Setup

If the **Phone Call** option is selected, the following screen will display.

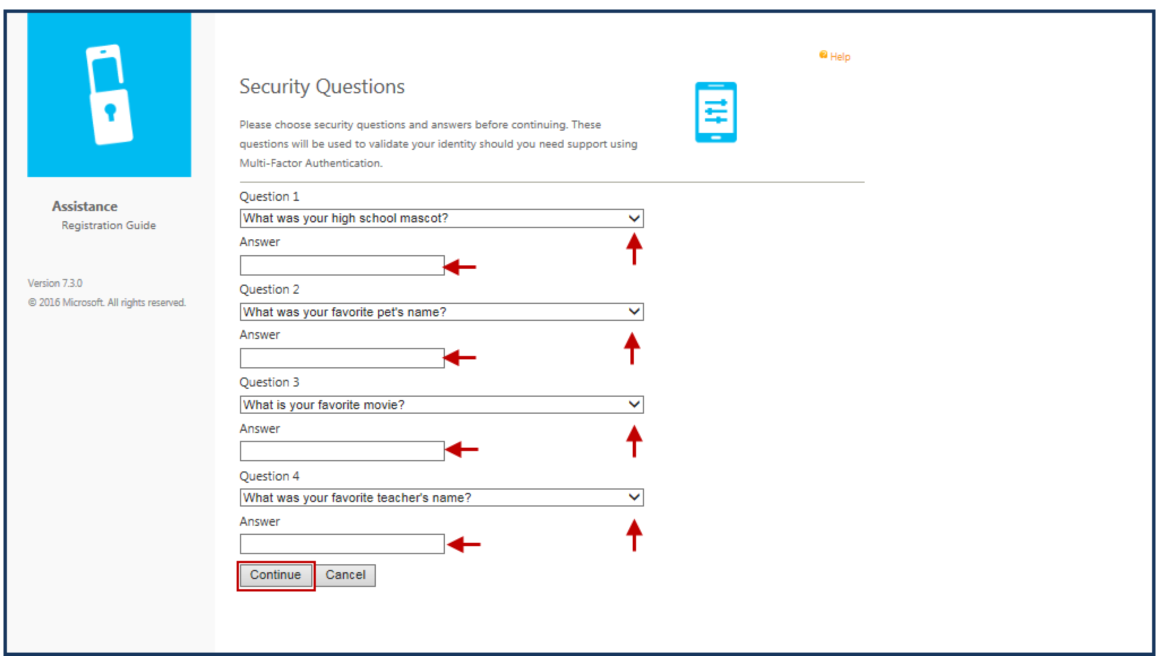
Enter primary and secondary phone numbers. The first confirmation phone call will be placed to the primary phone number. If there is no answer at this number, a second call will be placed to the secondary number entered.

Once both numbers have been entered, select **Call Me Now to Authenticate**.

A call will be placed to each phone number to complete the authentication process. After the user selects # (on the phone keypad) the user’s authentication will be confirmed and the call will be disconnected.



Security questions will be required in order to complete the authentication process. These questions can be used to gain access to the user portal without MFA. Select a question from each drop-down menu, enter the answer for each question, and select **Continue**. Four (4) security questions and answers are required.



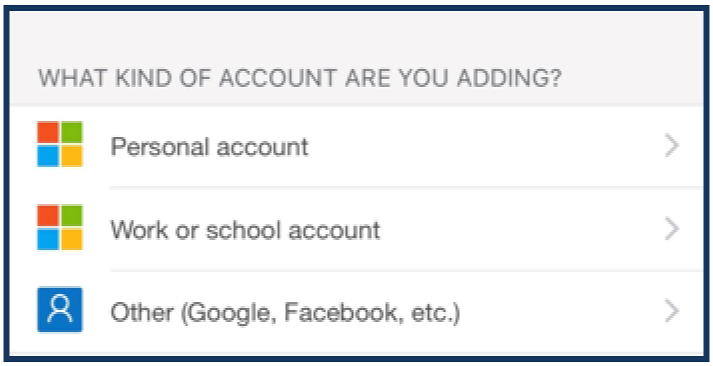
Upon successful completion, the user will receive a “Welcome” message to confirm MFA registration.

Mobile App Setup

If the **Mobile App** option is selected, the Microsoft Authenticator mobile app will need to be downloaded to the user's smartphone using the mobile carrier's app store. This app allows the user to verify their identity quickly and securely.

- Android: https://play.google.com/store/apps/details?id=com.azure.authenticator&hl=en
- iOS: https://itunes.apple.com/us/app/microsoft-authenticator/id983156458?mt=8
- Windows: https://www.microsoft.com/en-us/store/p/microsoft-authenticator/9nblggzmcj6

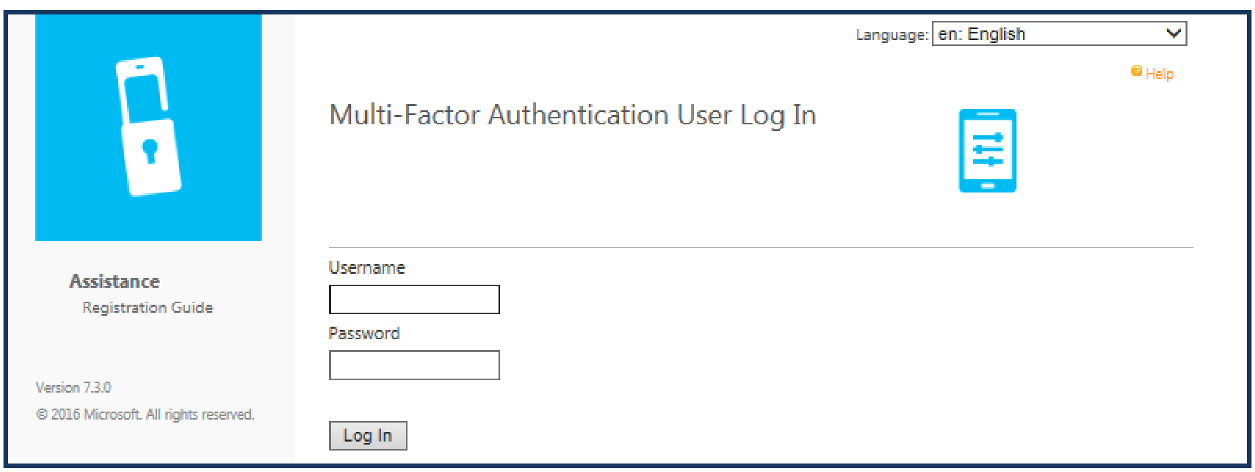
Upon successful installation of the Microsoft Authenticator mobile app, the user will be asked to identify the type of account being added. Select **Work or school account**.



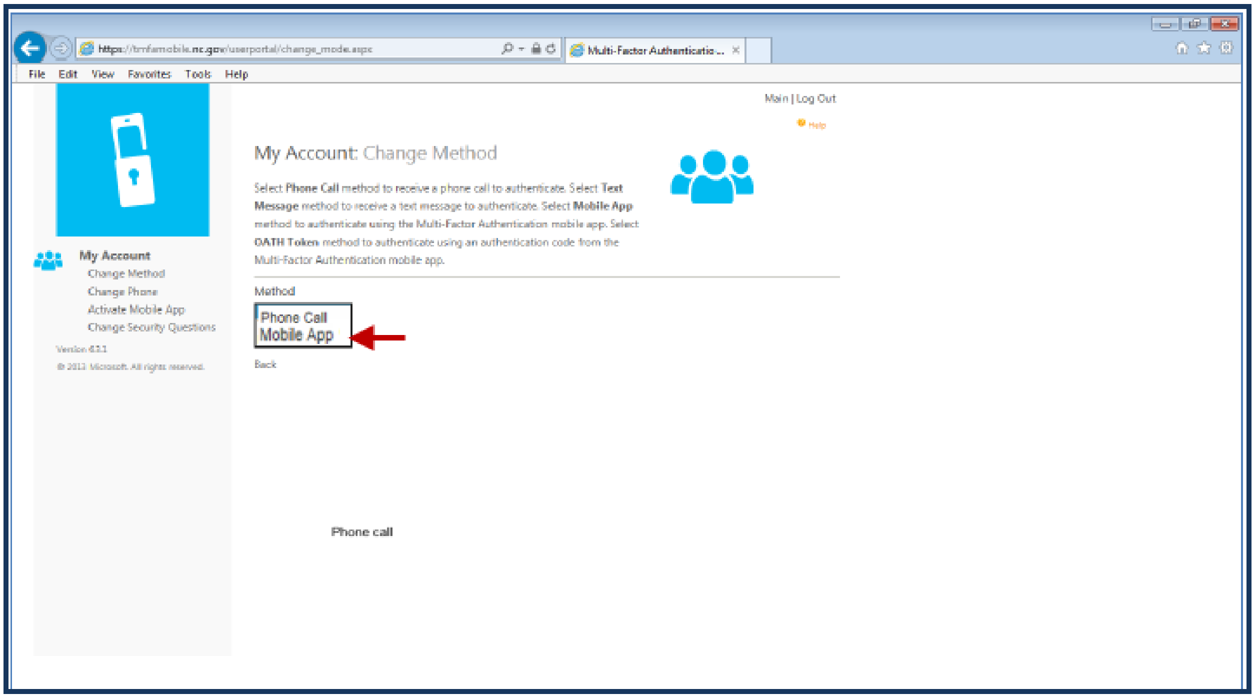
Note: This image may be different depending on the user's mobile carrier.

Once the mobile app has been installed on the user's smartphone, the user will navigate back to the State MFA Portal (https://mfaPortal.nc.gov/nctracksmfa/) to complete the setup process.

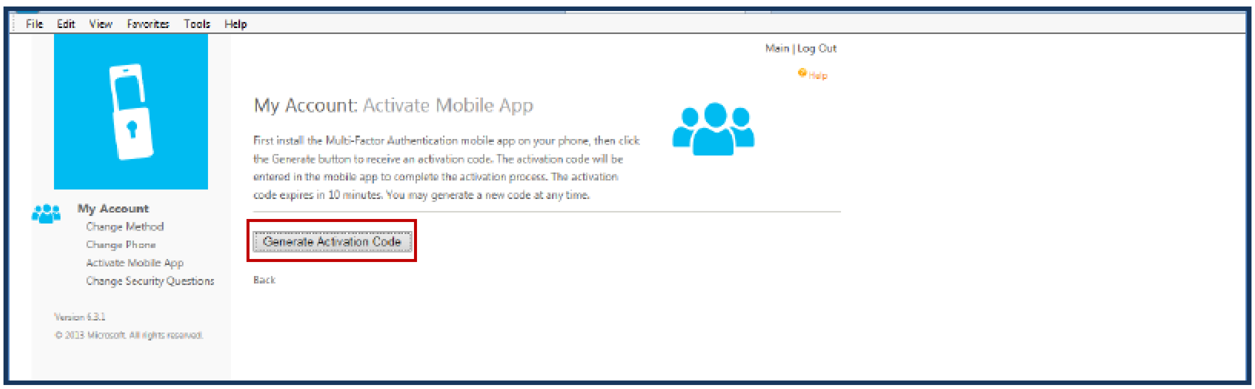
Enter the NCTracks NCID (username) and password.



Select **Mobile App**.



Select **Generate Activation Code**.



The page will then display an activation code, a URL, and a barcode picture. The activation code will expire in 10 minutes. A new code can be generated at any time.

Use the newly installed Microsoft Authenticator mobile app to complete the next steps:

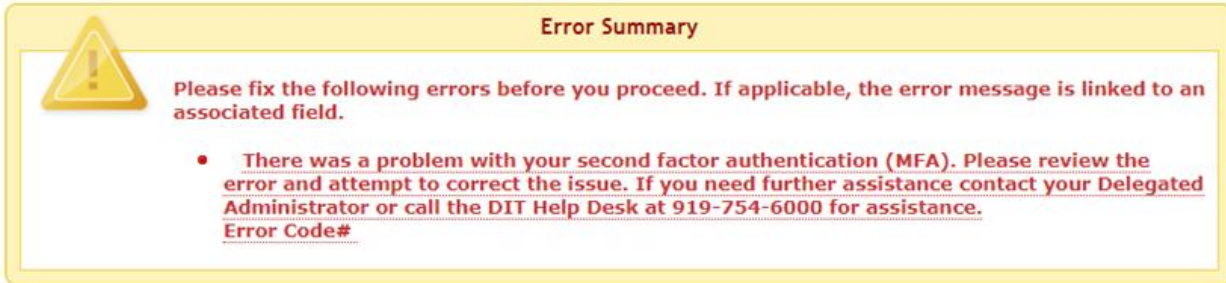
- Manually enter the activation code and URL into the mobile app, or use the barcode scanner to scan the barcode picture.
- Security questions will be required in order to complete the authentication process. These questions can be used to gain access to the user portal without MFA. Select a question from each drop-down menu, enter the answer for each question, and select **Save**.

Once these steps are successfully completed, the user will receive an authentication notification on their smartphone. In order to complete the registration process, the user will need to select **APPROVE**.

Troubleshooting Login Issues

There are some potential errors that may be encountered during the NCTracks login and MFA process. Not all error messages received will require that the user contact the State MFA Help Desk.

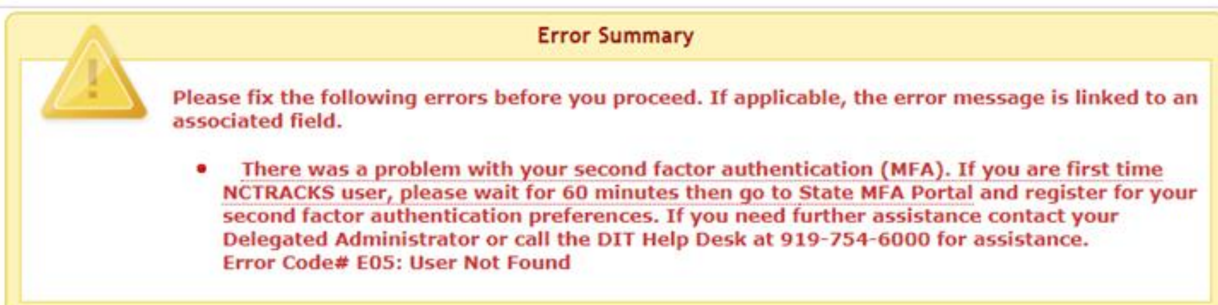
Note: Users should be sure to read the "Error Code" description in order to be able to take the correct actions to proceed with the MFA process.



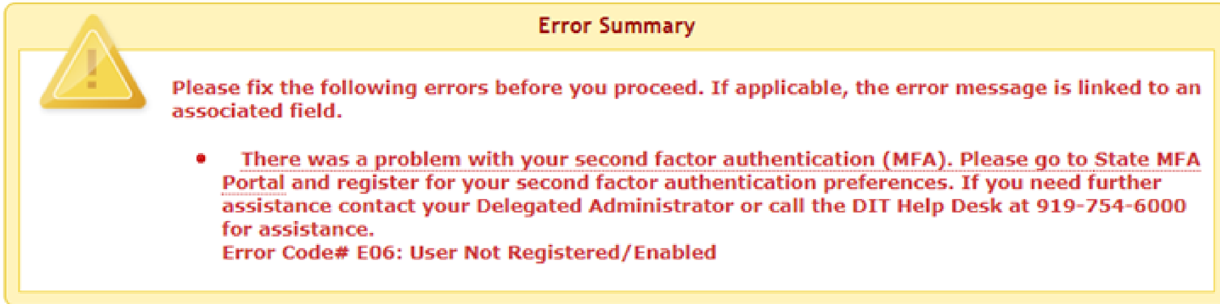
Error Message	Resolution
# Not pressed After Entry	This error is received when the confirmation call is answered and any other key besides the "#" is pressed. • Return to the NCTracks login page, re-enter the NCID and password to receive a new confirmation call, and press the "#" key after answering.
No Phone Input – Timed Out	This error is received when the confirmation call is answered and no input is received. • Return to the NCTracks login page, re-enter the NCID and password to receive a new confirmation call, and press the "#" key after answering.
User Disconnect Call	This error is received when the confirmation call is answered and disconnected and no input is received. • Return to the NCTracks login page, re-enter the NCID and password to receive a new confirmation call, and press the "#" key after answering.

Error Messages Requiring Account Updates on MFA Portal

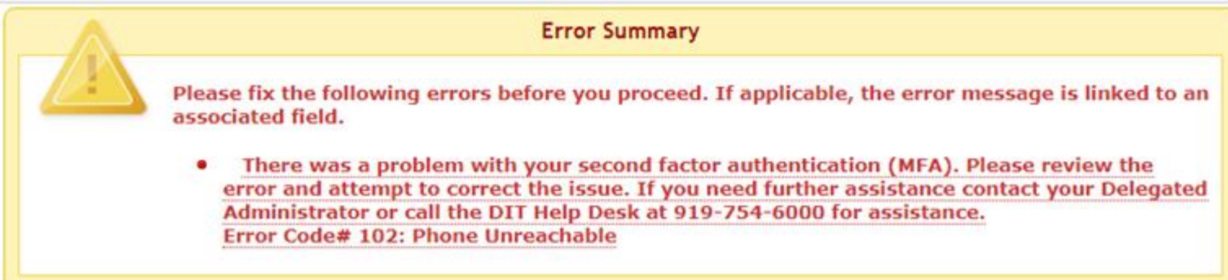
The following error message may be received when account updates are required on the MFA Portal. Newly provisioned NCTracks users will need to wait at least 60 minutes after their NCID has been established prior to registering their MFA information on the MFA Portal.



If the user has not registered on the MFA Portal and logs in to NCTracks, the following error message will be received. To resolve this error, the user will need to follow the Enrolling in MFA steps.



If the primary and/or secondary phone numbers registered on the MFA Portal are no longer valid, the user will receive the following error message. To resolve this issue, the user will need to log in to the MFA Portal (https://mfaportal.nc.gov/nctracksmfa/) and update the primary and/or secondary numbers provided.



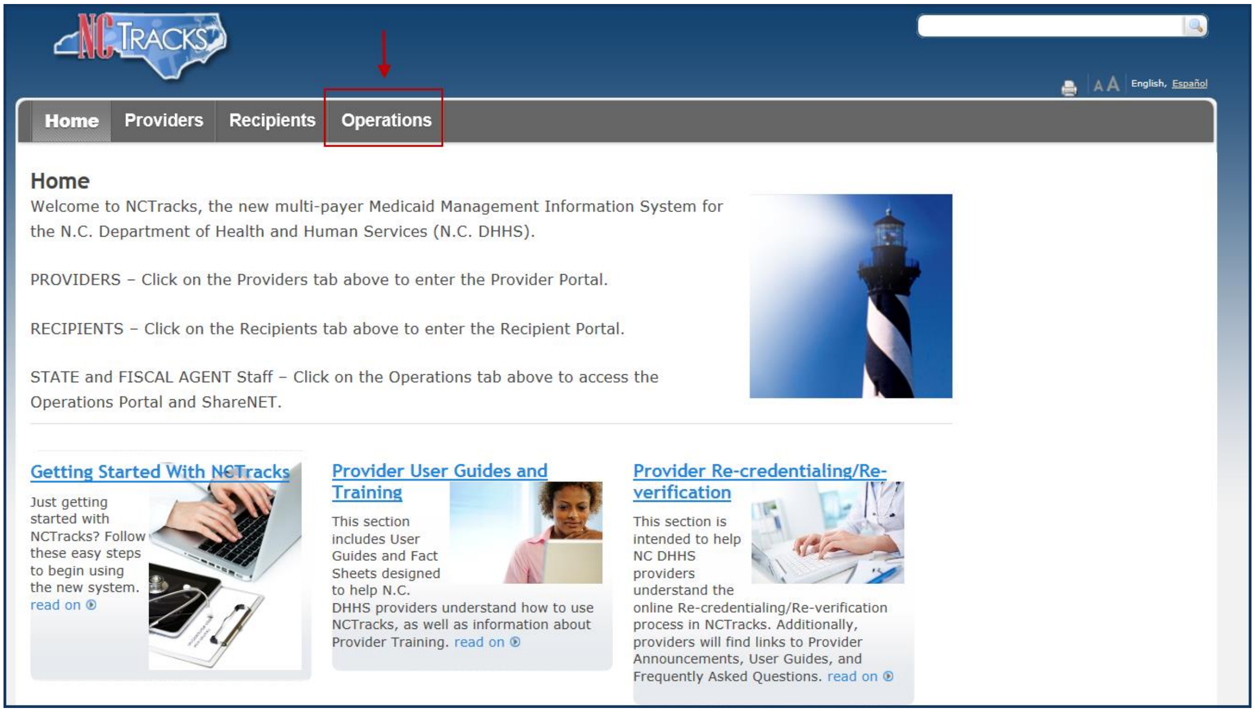
When to Contact the MFA Help Desk

The following errors, if received by the user, will require assistance from the MFA Help Desk.

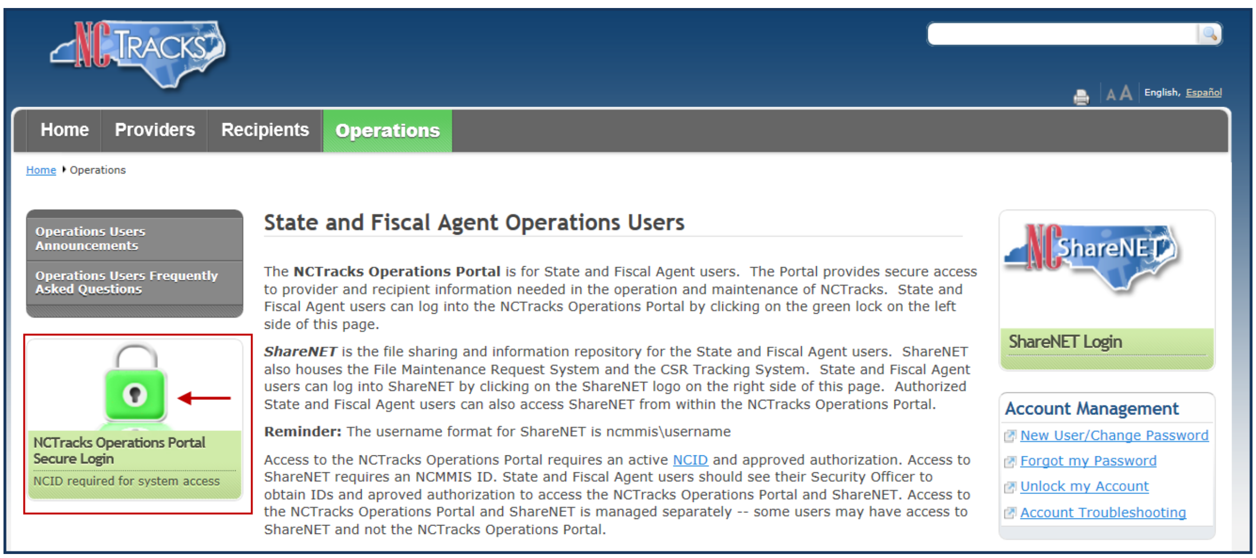
Error	Resolution
Mobile App Denied	Contact the MFA Help Desk at 919-754-6000
Mobile App No Response	Contact the MFA Help Desk at 919-754-6000

NCTRACKS LOGIN

Once the MFA process is complete, the user will navigate to www.nctracks.nc.gov and select the **Operations** tab.

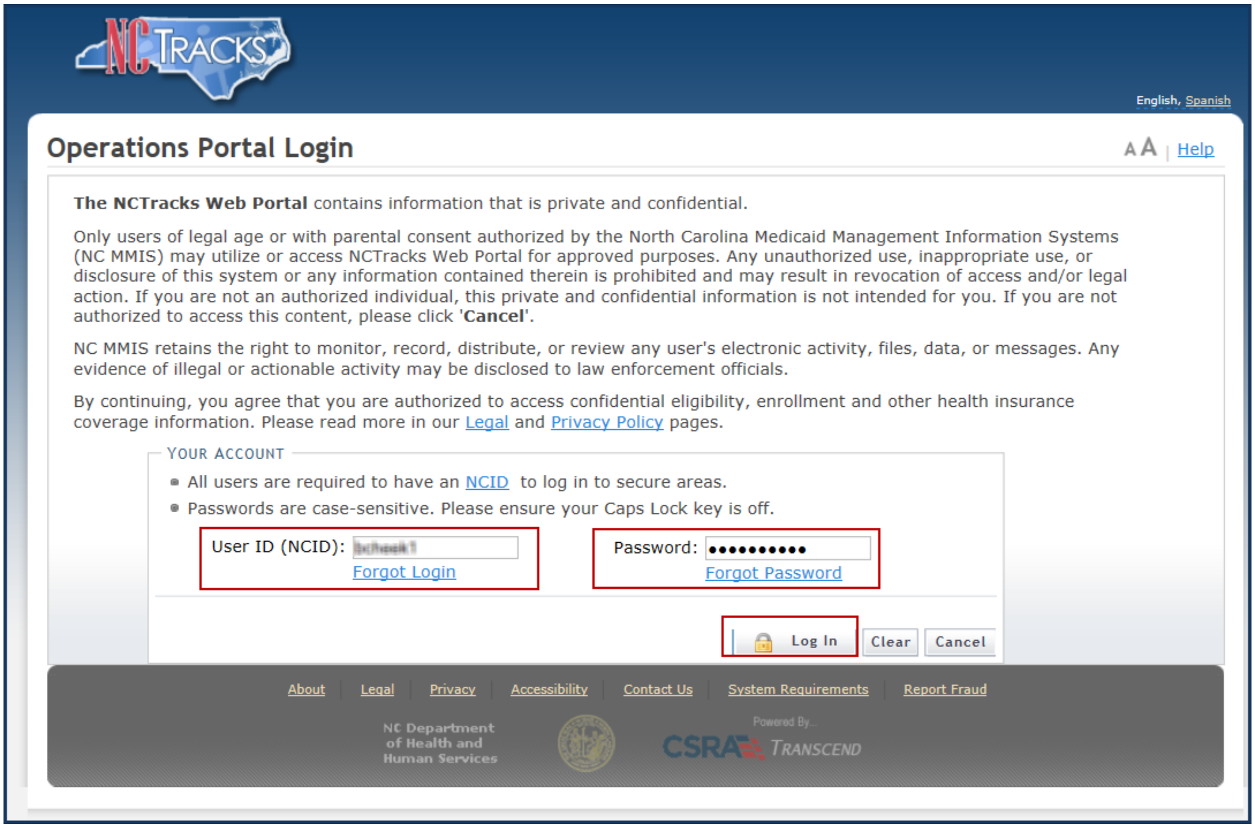


The following screen will display. The user will select the green lock icon identified as "NCTracks Operations Portal Secure Login."

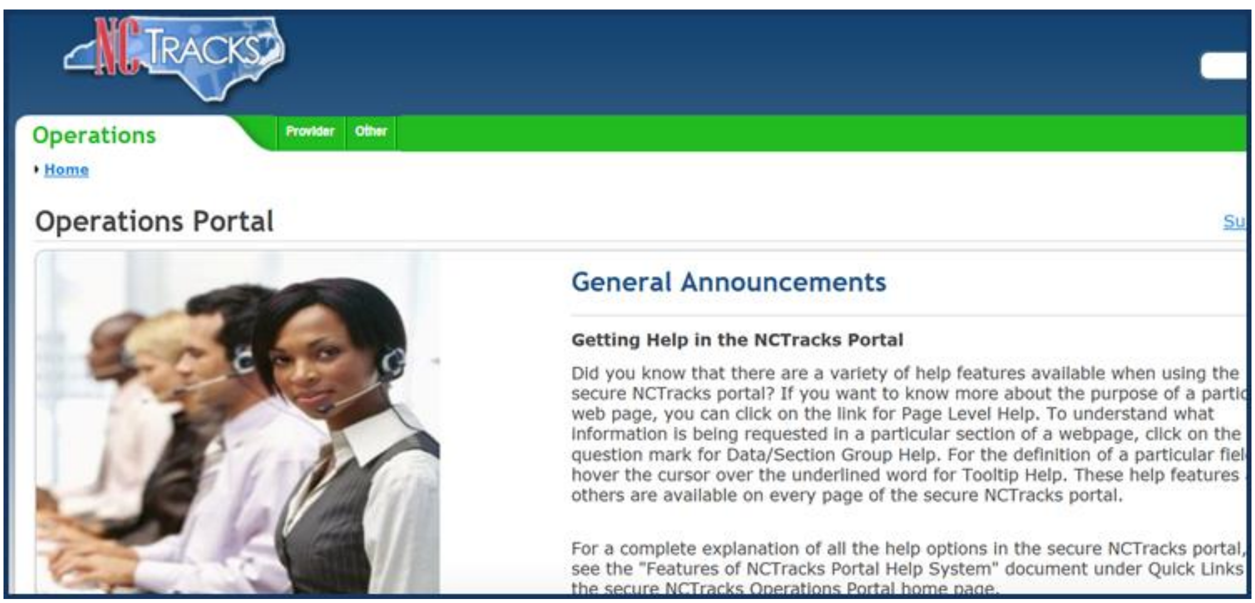


The Operations Portal Login screen requires the user to enter their NCID and password.

Passwords are case sensitive. After three unsuccessful attempts, the user will be locked out; however, NCTracks will provide a contact number that the user can call for access assistance. MFA is **REQUIRED**. Once the user has entered their NCID and password, they will receive their second level authentication via their preferred method (Phone or Mobile App).



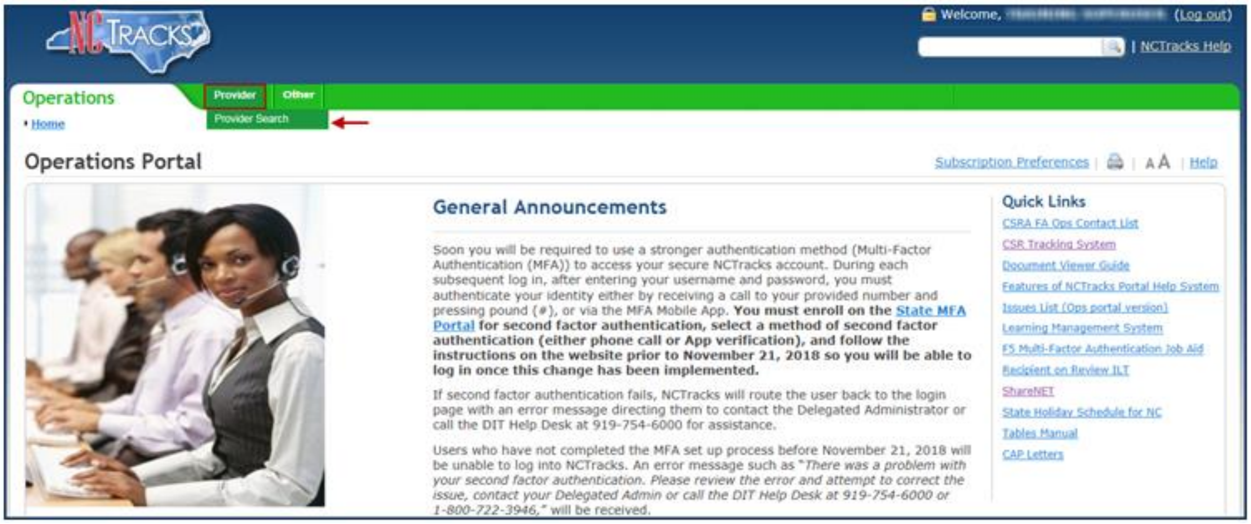
PHP providers will see the following screen once they have successfully logged in to the NCTracks secure Operations Portal.



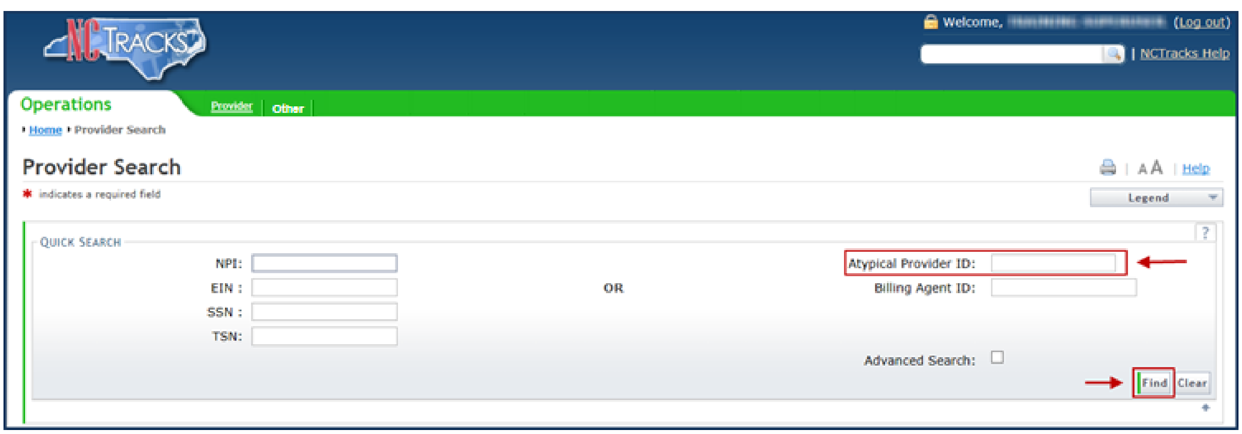
PROVIDER SEARCH

To locate a PHP provider record for review and/or update, select the **Provider** tab and select the **Provider Search** menu option.

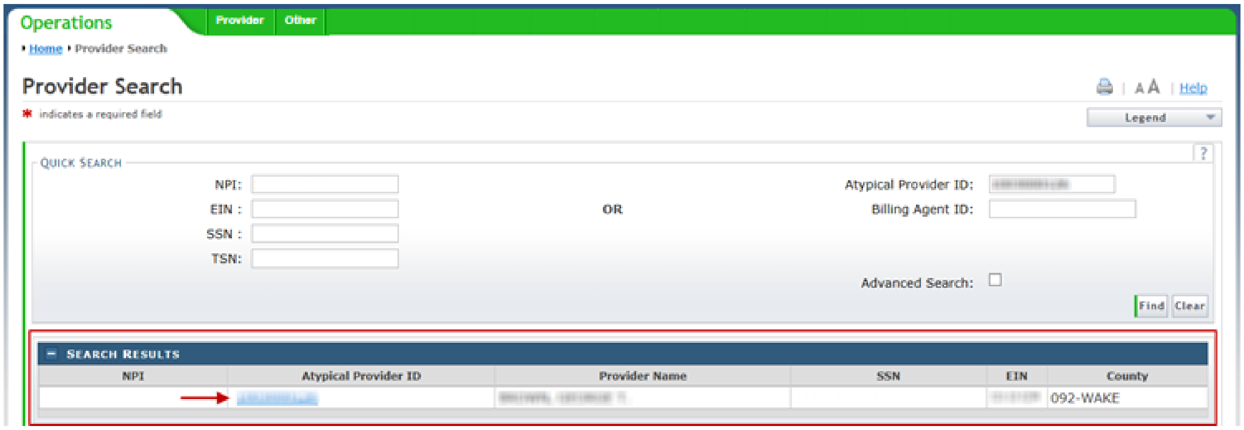
Note: PHP Operations Portal users are only able to search for, review, and update their own enrollment records.



On the Provider Search screen, enter the PHP Atypical Provider ID number in the **Atypical Provider ID** field and select **Find**.



NCTracks will return search results that contain the PHP Atypical Provider ID (as a hyperlink), the PHP name and Employer Identification Number (EIN), and County information. Select the Atypical Provider ID hyperlink to access the provider record.



REVIEWING AND UPDATING THE PHP PROVIDER RECORD

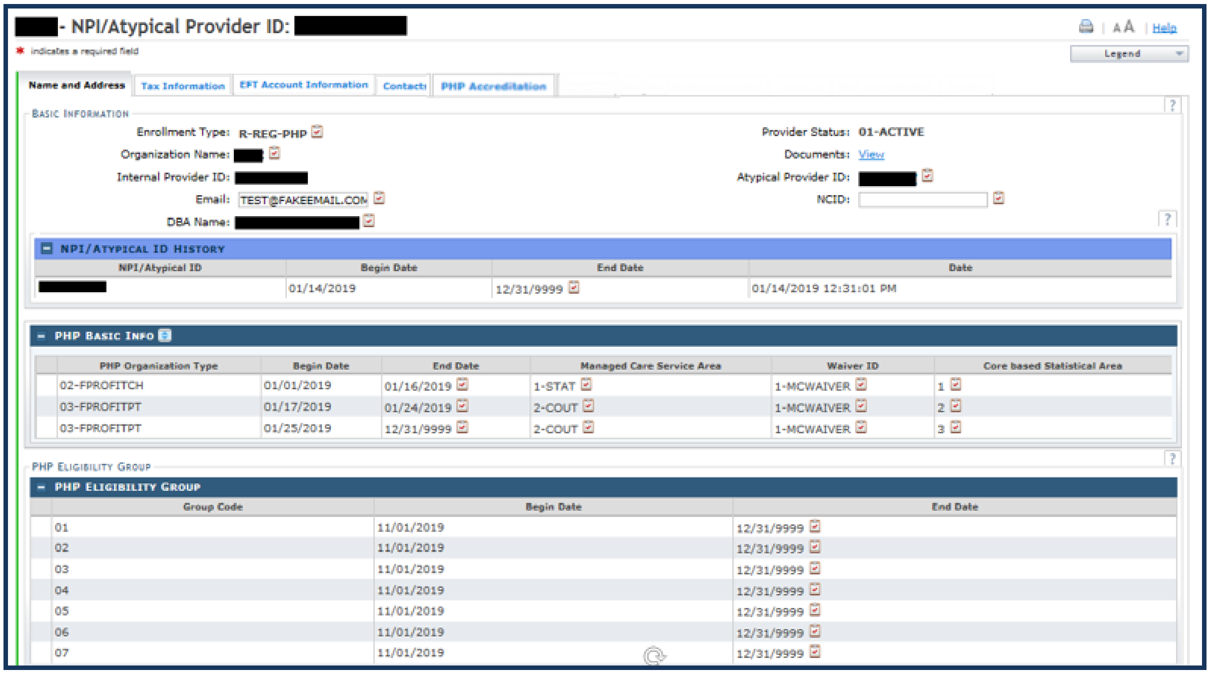
The PHP provider record displays the following tabs:

- Name and Address
- Tax Information
- EFT Account Information
- Contacts
- PHP Accreditation

The following sections provide more information about each tab's page content and editable fields.

Name and Address

The read-only **Name and Address** page displays the PHP provider's basic information and address details.

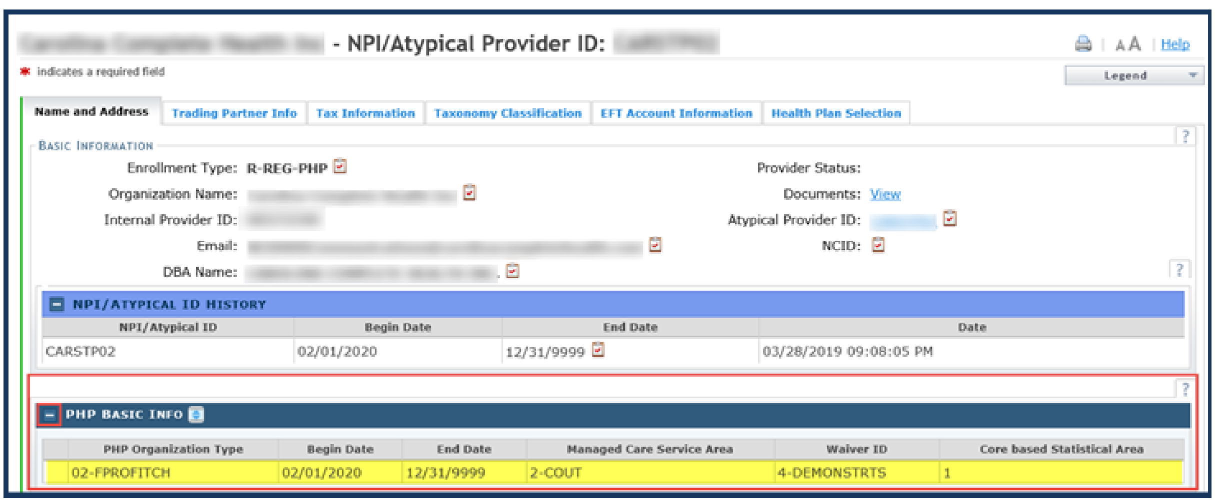


PHP Basic Info

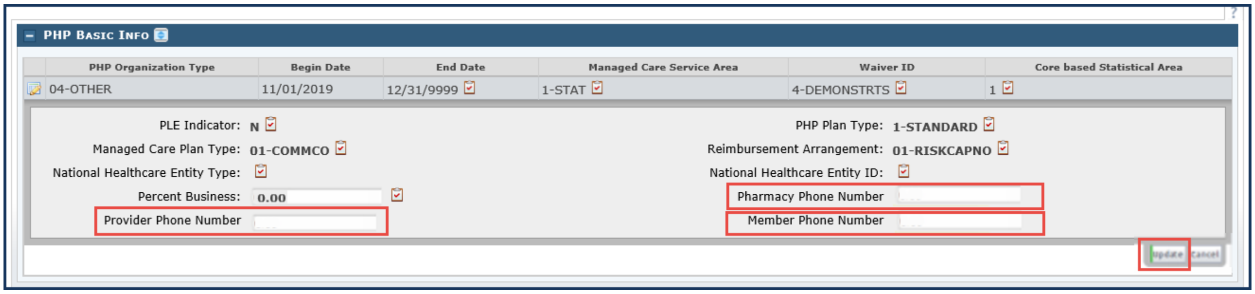
The **PHP Basic Info** section can be expanded so that the call center's Provider Phone Number, Pharmacy Phone Number, and Member Number can be updated.

Expand the PHP Basic Info section by selecting the (+) sign to the left of the section heading.

Expand the line to be updated by clicking anywhere on the line (highlighted area).

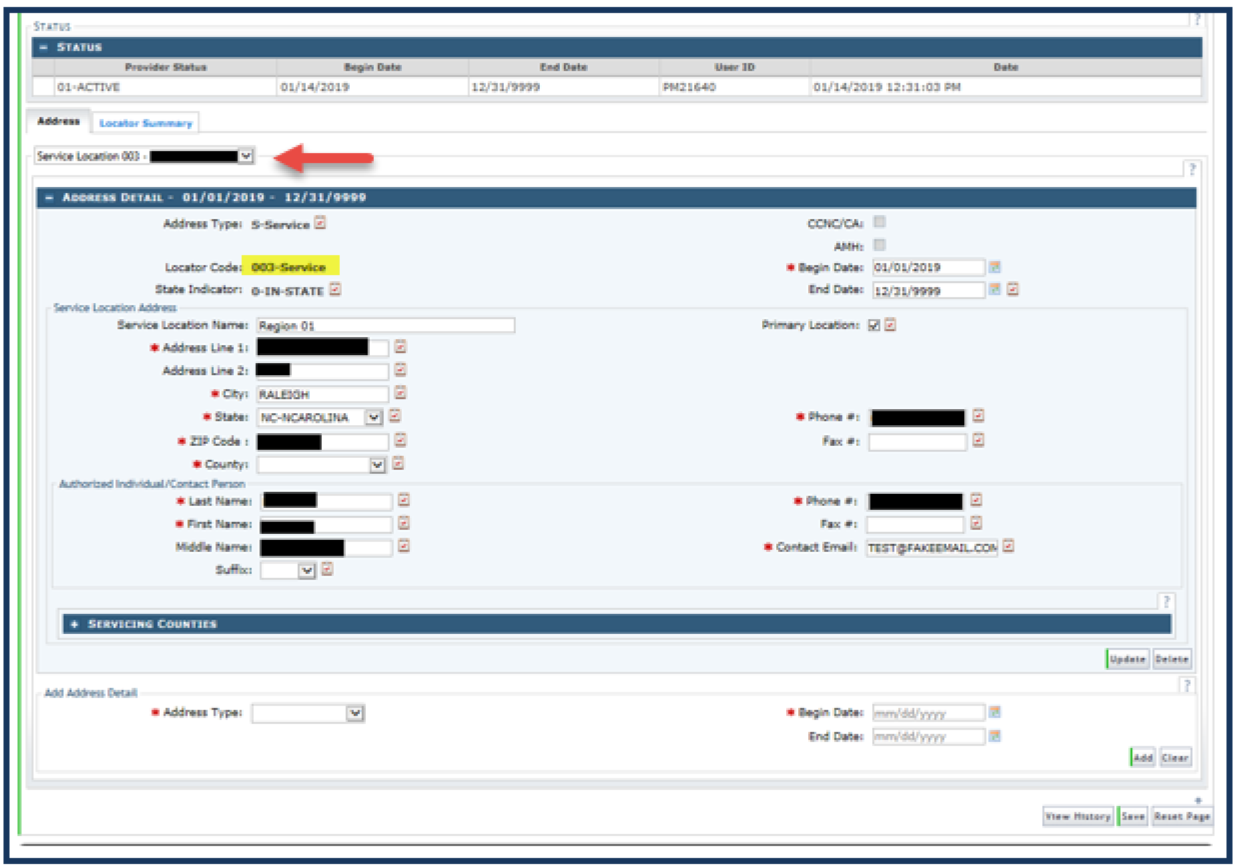


Update phone numbers as needed and select **"Update".**



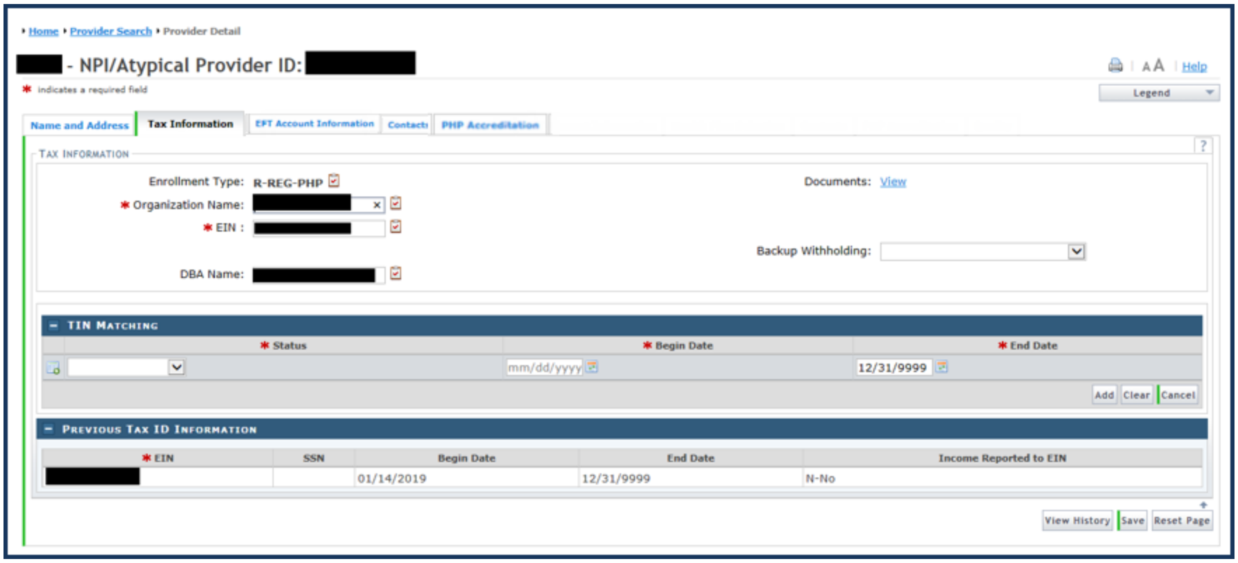
The Address information is location/region specific. In this section you will see:

- Service Location 001 – Pay-To Address
- Service Location 002 – Correspondence Address
- Service Location 003 – Region 1 address information
- Service Location 004 – Region 2 address information
- Service Location 005 – Region 3 address information
- Service Location 006 – Region 4 address information
- Service Location 007 – Region 5 address information
- Service Location 008 – Region 6 address information



Tax Information

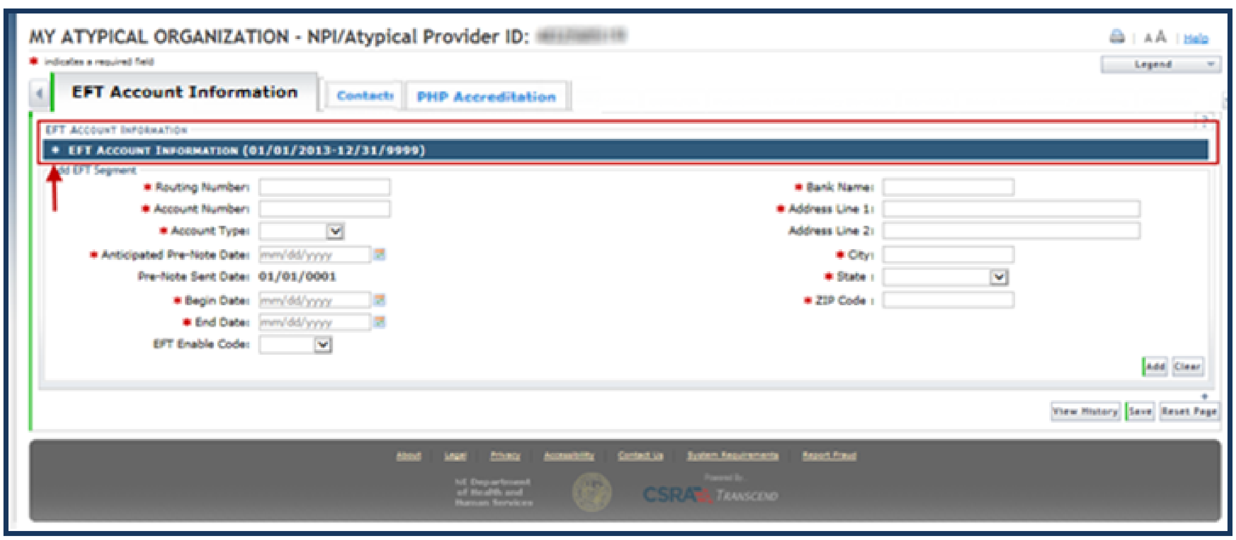
The read-only **Tax Information** page displays the PHP provider's tax information.



EFT Account Information

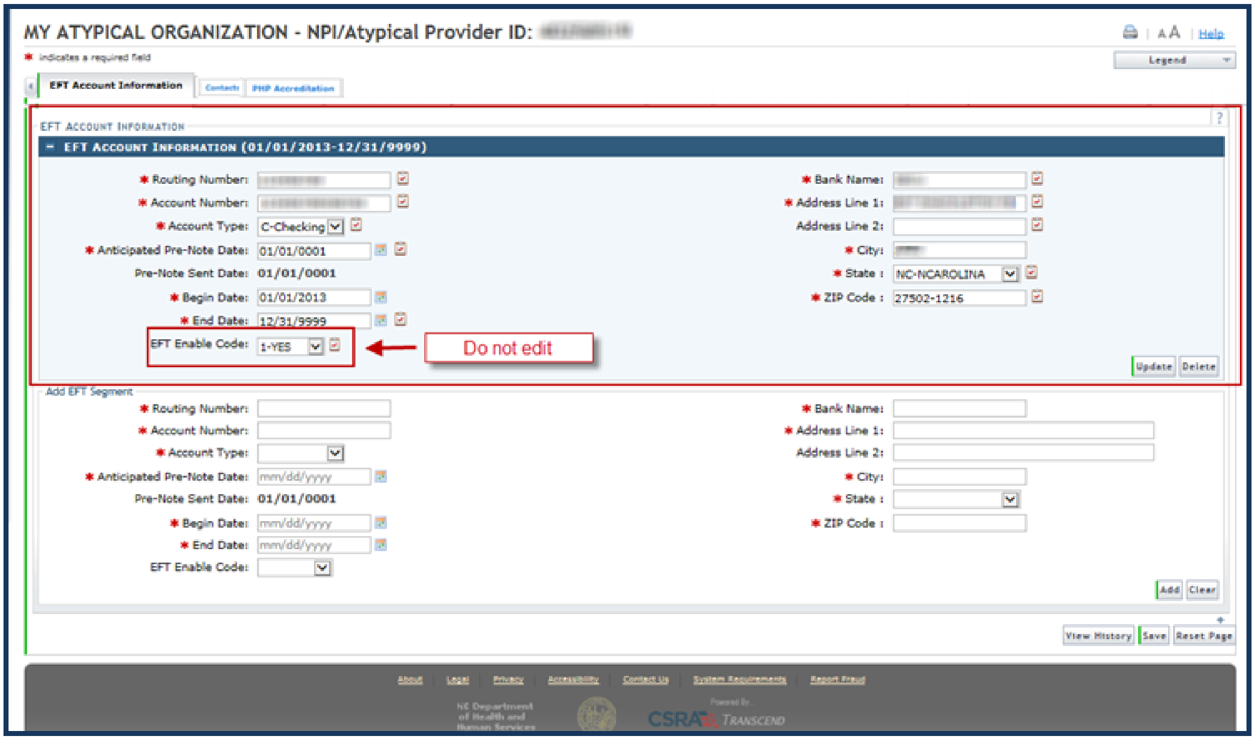
The PHP provider can update their Electronic Funds Transfer (EFT) account information on the **EFT Account Information** page.

When the page first displays, the current EFT account information is collapsed. Select the plus (+) sign to view the information.



EFT account information is very important for the proper transmission of funds. In order for the account to receive funds, the EFT must have completed the Pre-Note process so that the EFT Enable Code status is set to '1-YES'. The user should NOT edit the EFT Enable Code on an existing account. The system will send a Pre-Note to the financial institution to ensure the data is correct and will automatically update this field.

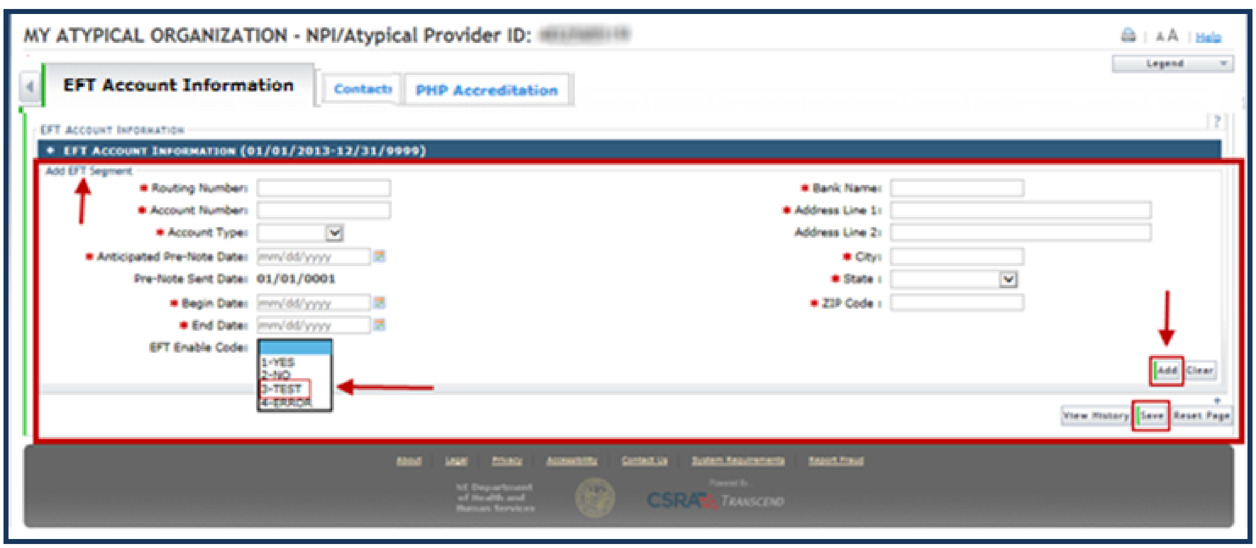
No funds will be transferred to the account if the EFT Enable Code is '2-NO' or '3-TEST'.



Updating EFT Account Information

If the EFT account information needs to be updated, the new EFT account information should be added to the record. Do not edit existing information on this page.

In the **Add EFT Segment** section, complete the following fields.



- **Routing Number** – Unique code associated with a bank account.
- **Bank Name –** Name of provider's EFT bank.
- **Account Number** – Bank account number.
- **Address Line 1 –** Address of provider's EFT bank. This can be the local branch or corporate address.
- **Account Type** – Select C-Checking or S-Savings.
- **Address Line 2 –** Address of provider's EFT bank (if applicable).
- **Anticipated Pre-Note Date** – Enter the current day's date. Do not use a date in the past or the Pre-Note will not be sent to the financial institution.
- **City** – City of provider's EFT bank.
- **State** – Drop-down lists the state of provider's EFT bank.
- **ZIP Code** – ZIP Code of provider's EFT bank.
- **Begin Date** – Start date that provider's bank account is used for EFT. This should also be the current day's date.
- **End Date** – Enter 12/31/9999. This is the last date that the provider's bank account is used for EFT.
- **EFT Enable Code –** Select 3-TEST from the drop-down menu. This will prompt the Pre-Note process and will later be changed by the CSRA Finance department once the Pre-Note process is complete.

  Note: Although the EFT Enable Code is an editable field, it is important that the provider not change the code once it has been updated by the CSRA Finance Department.

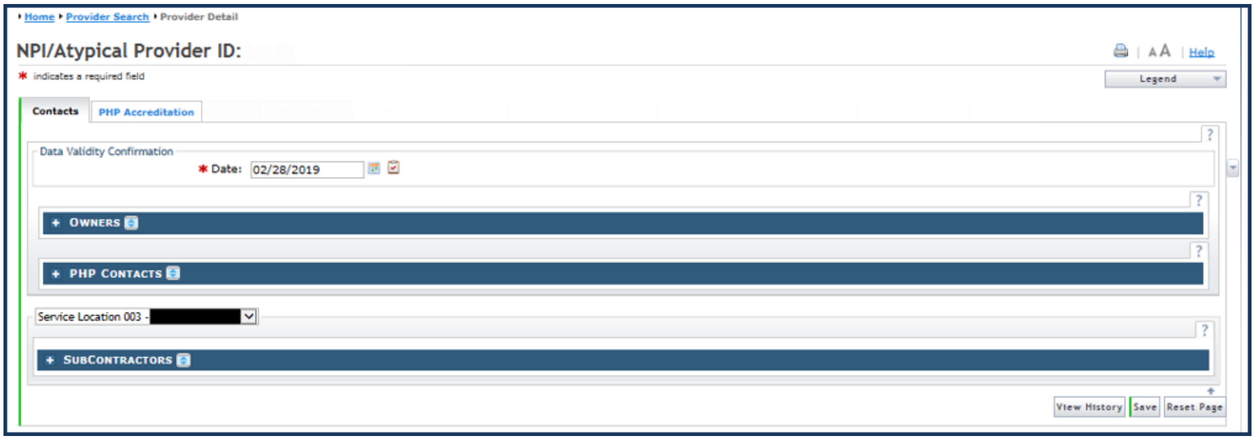
Once all required data has been entered, select **Add** and then select **Save**.

If an error is received during the Pre-Note process, the provider will be notified via U.S. Mail. The letter will be sent to the correspondence address on file.

Contacts

The **Contacts** page displays information for the PHP provider's owners, contacts, and subcontractors. The page prepopulates with the information provided in the PHP Inbound Datasheet. Providers can update the owners, contacts, and subcontractors information when necessary.

The Data Validity Confirmation date is initially set to the date the PHP record was added to NCTracks. The PHP should review all their data once per year and update this date (using the calendar feature/icon) to the current date. This is the PHP's way of acknowledging that all of the PHP Contact data has been reviewed and updated if applicable.

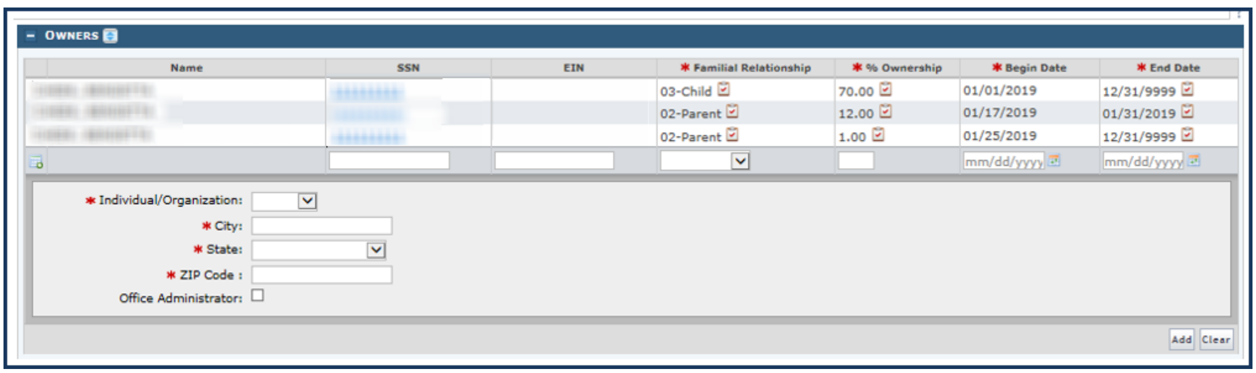


Updating Contact Information

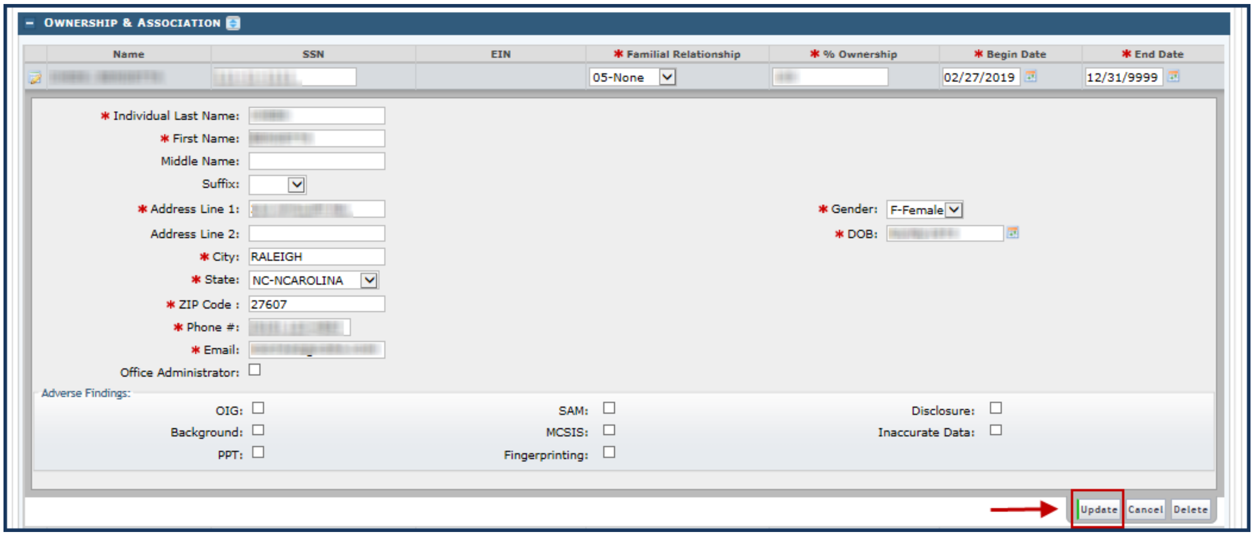
The provider's record should always contain accurate and up-to-date information. The provider will need to update their information accordingly, if a listed owner, contact, or subcontractor is no longer a part of the organization or if any information about that owner, contact, or subcontractor changes.

Owners

Once the **Owners** section is expanded, the provider can view and update any of the information present. The provider can also add additional owners.



To edit an owner's information, select the owner's name to expand the segment.



The expanded segment displays the following editable fields:

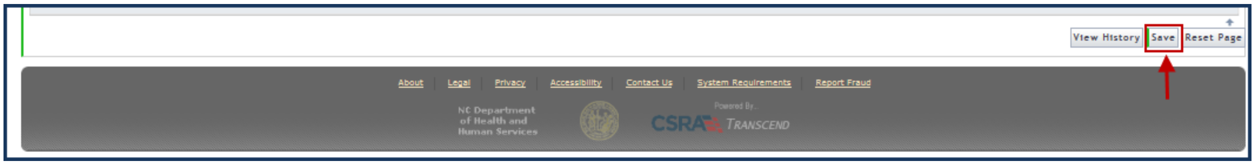
- SSN (if individual)
- EIN (if business)
- Familial Relationship
- % Ownership
- Begin Date
- End Date
- Individual Last Name (if individual)
- First Name (if individual)
- Middle name (if individual)
- Suffix (if individual)
- Business Name (if business)
- Address
- Gender (if individual)
- Date of Birth (if individual)
- City
- State
- ZIP Code
- Phone Number
- Email Address

Once all updates have been made, select **Update** in the bottom right corner. This selection saves the updated owner information.

To cancel the updates, select **Cancel**.

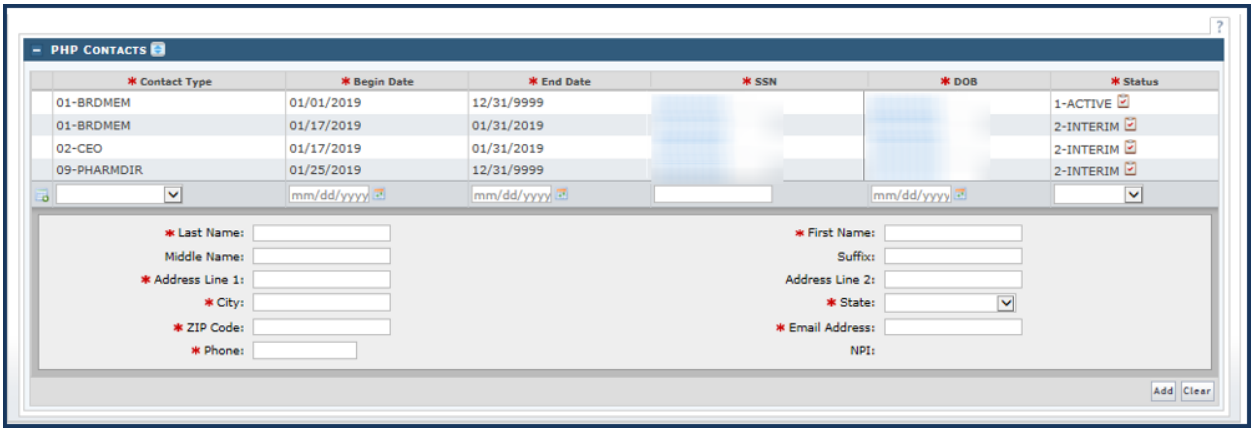
To add new owners:

1. Select **I-INDV** or **O-ORG** from the **Individual/Organization** drop-down.
2. Complete all required fields for the owner (as indicated by the red asterisk).
3. Select **Add**.
4. Navigate to the bottom right corner of the page and select **Save** to save all changes.



PHP Contacts

Expand the **PHP Contacts** section to view the information for all PHP contacts on file.



The segments with data populated can be expanded, viewed, and edited. The lower portion of the section is used to add a new contact to the record.

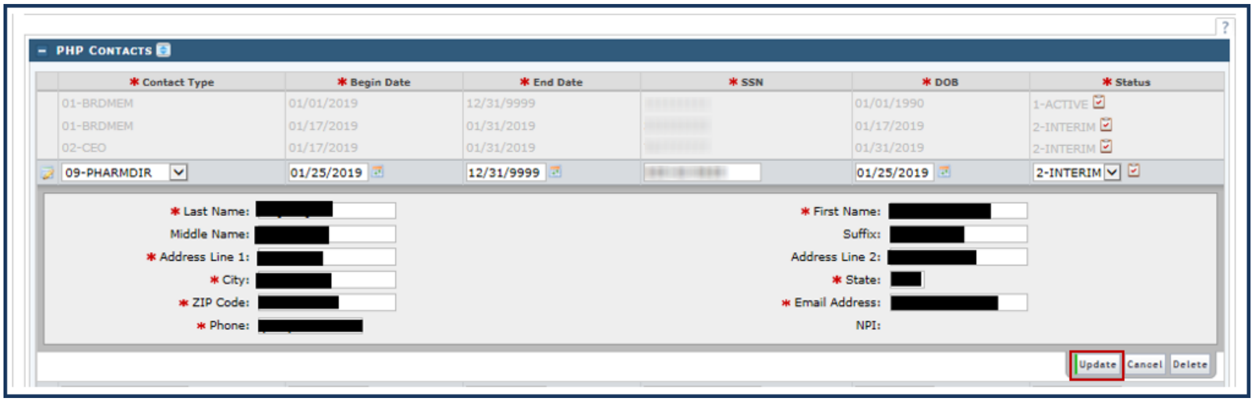
Once a PHP Contact segment is expanded, the provider can view and edit the contact information.

When adding a new contact, complete the following fields:

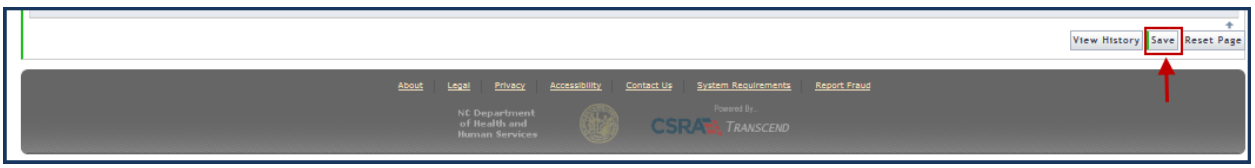
- Contact Type
- Begin Date
- End Date
- SSN (Social Security Number)
- DOB (Date of Birth)
- Status
- Last Name
- First Name
- Middle Name
- Suffix
- Business Address

- City
- State
- ZIP Code
- Email Address
- Phone Number
- NPI (if applicable)

Select **Update** in the bottom right corner of the section to save the edits.



Navigate to the bottom right corner of the page and select **Save** to save all changes.

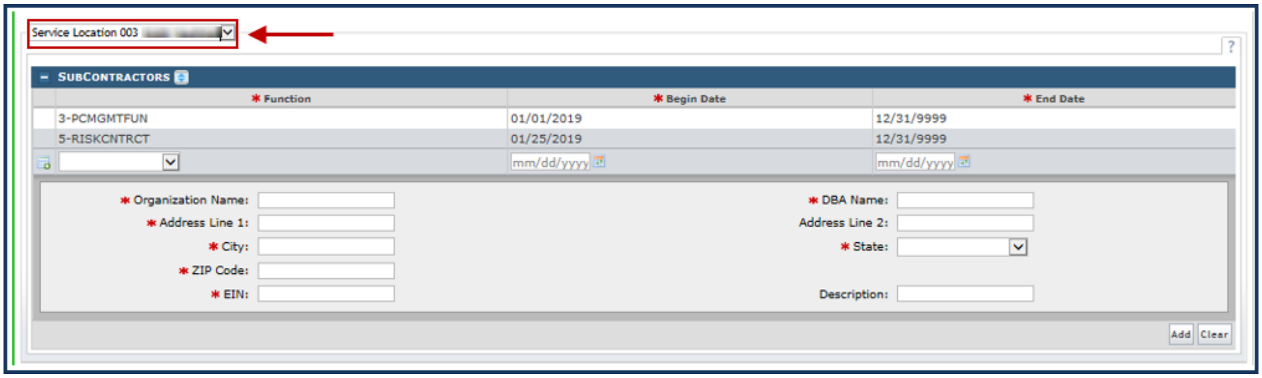


Subcontractors

Subcontractor information is location/region specific. If a PHP has multiple locations that utilize subcontractors, the provider must select the location from the drop-down menu and then make the updates. If the same subcontractor is present on multiple locations, their data will need to be manually updated for each location/region. The updated information is not automatically copied from one location to another location.

- Service Location 003 – Region 1 address information
- Service Location 004 – Region 2 address information
- Service Location 005 – Region 3 address information
- Service Location 006 – Region 4 address information
- Service Location 007 – Region 5 address information
- Service Location 008 – Region 6 address information

Select the Service Location and expand the **Subcontractor** section.

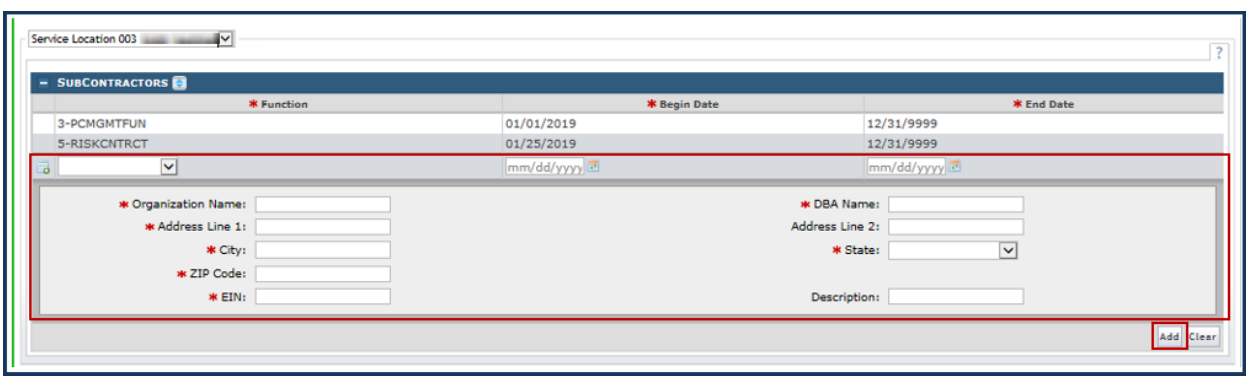


Existing Subcontractor information will be present. The lower portion of the section is used to add a new subcontractor contact.

When adding a new Subcontractor, complete the following fields:

- Function
- Begin Date
- End Date
- Organization Name
- DBA Name (Doing Business As Name)
- Address
- City
- State
- ZIP Code
- EIN (Employer Identification Number)
- Description

Navigate to the bottom right corner of the section and select **Add**.



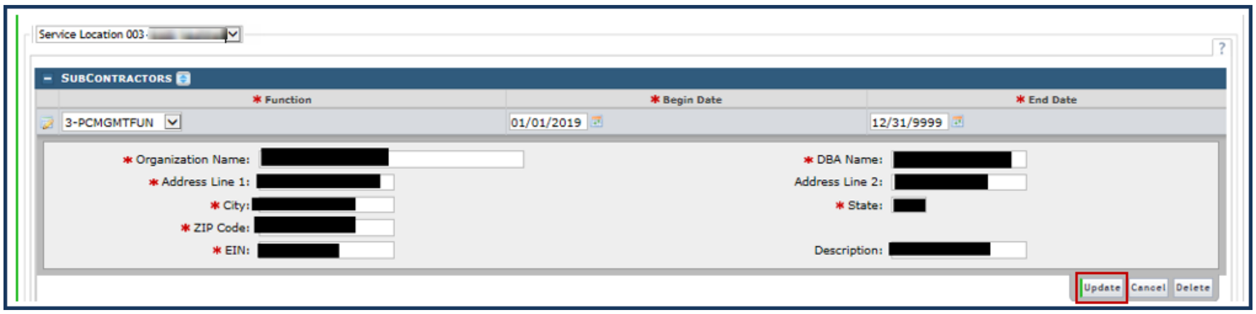
To edit information pertaining to a specific subcontractor, expand the segment of data specific to that subcontractor.

The following fields are editable:

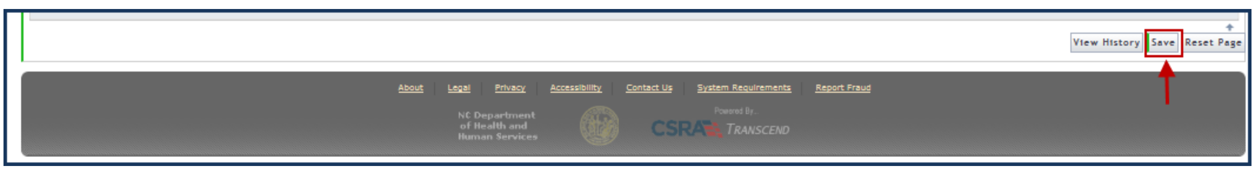
- Function
- Begin Date

- End Date
- Organization Name
- DBA Name (Doing Business As Name)
- Address
- City
- State
- ZIP Code
- EIN (Employer Identification Number)
- Description

After all updates are made, navigate to the bottom right corner of the section and select **Update**.



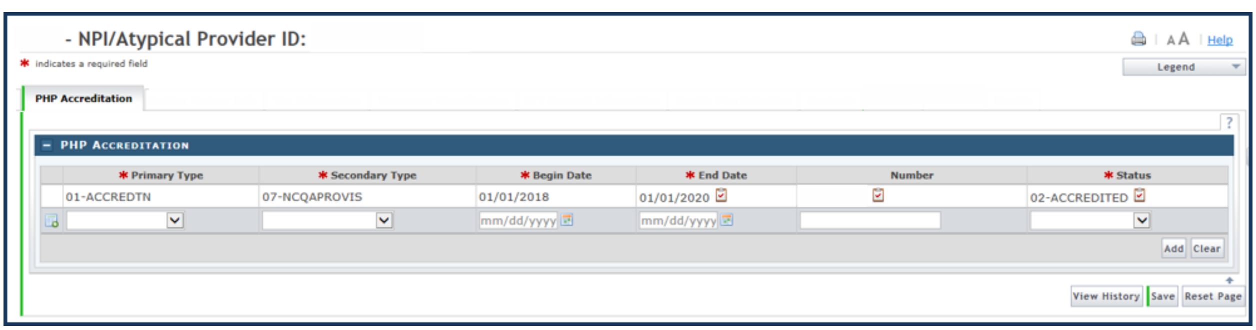
Navigate to the bottom right corner of the page and select **Save** to save all changes.



PHP Accreditation

The **PHP Accreditation** page displays the PHP provider’s licenses, accreditations, and certifications. The provider can update existing licenses, accreditations, and certifications as well as add new licenses, accreditations and certifications.

Once the section is expanded, all accreditation information available will be present.



If any information is not current or correct, the provider can edit the information by expanding the segment and making the applicable updates. Select **Update** after each revision, and then select **Save** to save all changes.

Adding a new license, accreditation, or certification will require populating the following fields:

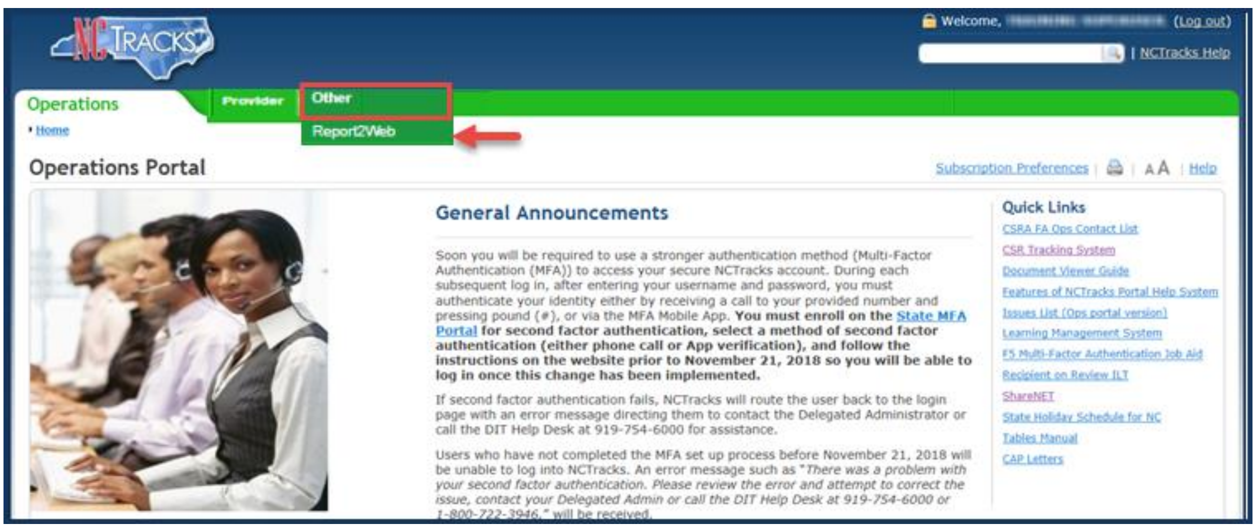
- Primary Type
- Secondary Type
- Begin Date
- End Date
- Number
- Status

Once the new information has been entered, select **Add**. Once all updates are complete, select **Save** to save all changes.

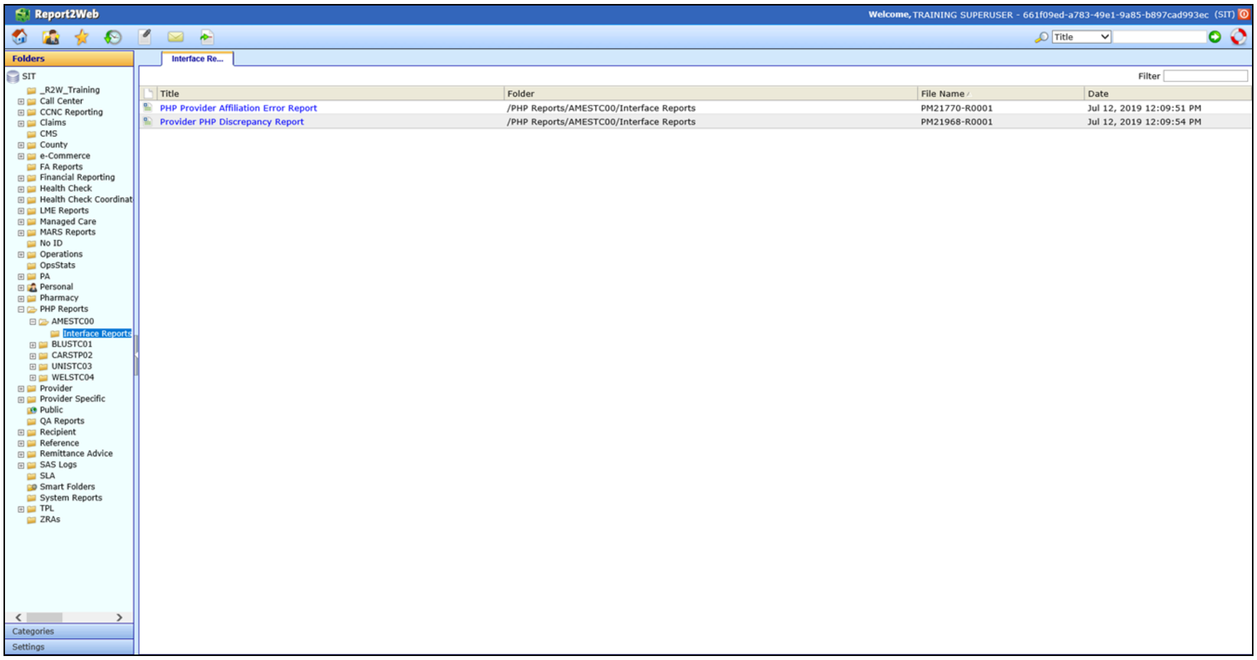
REPORT2WEB (R2W)

Report2Web (R2W) will be used to house PHP specific reports and PDF versions of the Remittance Advice.

When an authorized PHP user logs into the NCTracks Operations Portal with their NCID they will need to select the **Other** tab in order to access R2W.

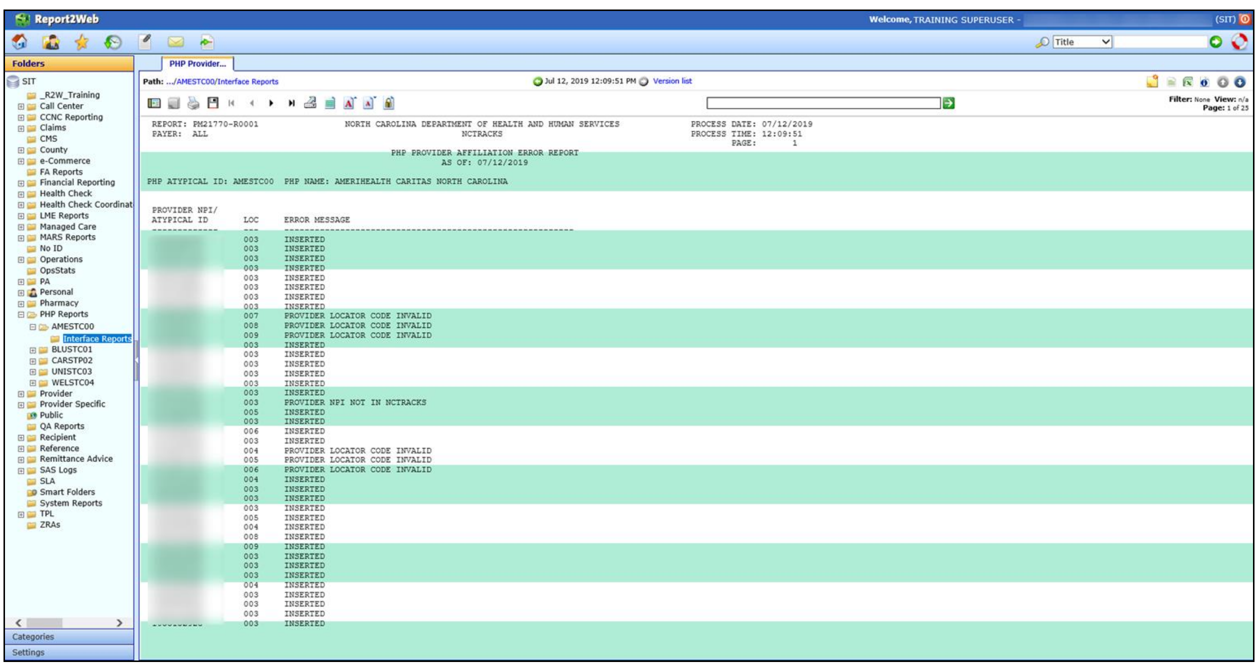


R2W will launch and the PHP specific folders will be present.



Once you have navigated to the appropriate folder you will find report titles, these report titles are hyperlinks to the actual report. Select the report you wish to review.

When a report is opened it will populate on screen. The user will have the ability to, print, save or export the file in Excel format. For more information on the features available in R2W please refer to the training document in the_R2W_Training folder.



ADDENDUM A. SYSTEM HELP

The major forms of help in the NCMMIS NCTracks system are as follows:

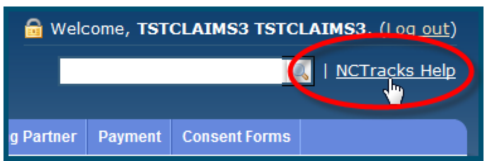
- Navigational breadcrumbs

- System-Level Help – Indicated by the “NCTracks Help” link on each screen
- Screen-Level Help – Indicated by the “Help” link above the Legend
- Legend
- Data/Section Group Help – Indicated by a question mark (?)
- Hover-over or Tooltip Help on form elements

Navigational Breadcrumb

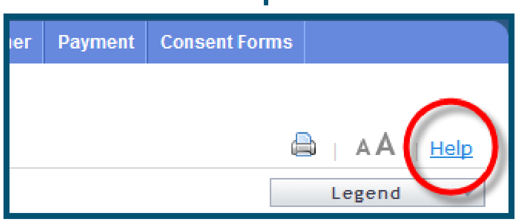
A breadcrumb trail is a navigational tool that shows the path of screens that the user has visited from the home screen. This breadcrumb consists of links so the user can return to specific screens on this path.

System-Level Help



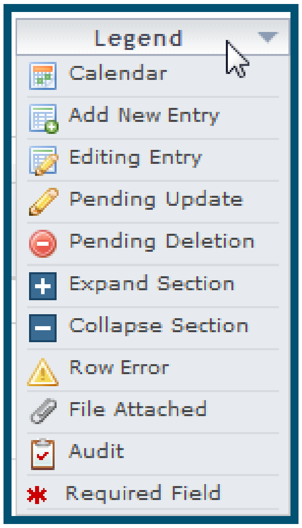
The System-Level Help link opens a new window with the complete table of contents for a given user’s account privileges. The System-Level Help link, “NCTracks Help”, will display at the top right of any secure portal screen or web application form screen that contains Screen-Level and/or Data/Section Group Help.

Screen-Level Help



Screen-Level Help opens a modal window with all of the Data/Section Group help topics for the current screen. The Screen-Level Help link displays across from the screen title of any web application form screen.

Form Legend

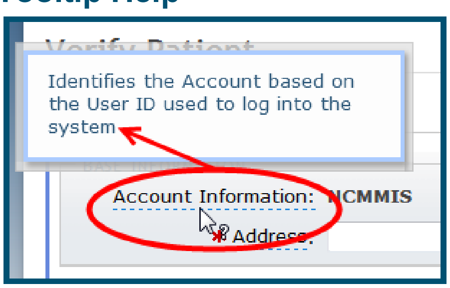


A legend of all helpful icons is presented on screens as needed to explain the relevant meanings. This helps the user become familiar with any new icon representations in context with the form or screen as it is used. Move the mouse over the Legend icon to open the list.

Data / Section Group Help

Data/Section Group Help targets the same modal window as Screen-Level help, but also targets specific form information associated with the Help link that the user selected. Data/Section Group Help displays as a question mark (?).

Tooltip Help



Tooltip help is available via a popup box that appears slightly above the screen element when a user hovers the cursor over the element. Text with an available tooltip has a dashed underline.