

Iowa Medicaid Enterprise

Setting Up Groups to Use  
Iowa Medicaid Portal  
Application

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## Introduction

The Iowa Medicaid Portal Application (IMPA) requires group(s) to be set up to access some functionality. There are two types of groups that can be established in IMPA; Public groups that other users can join if they wish and Private groups where membership/joining to the group are controlled by the group administrator. Most Medicaid Providers accessing secure functionality within IMPA will be establishing private groups. Additionally, for some functionality such as Electronic Remittance Advices, the private group must also have a Tax ID with one or more billing NPI's associated and registered with the IME.

Some considerations for how to set up your group include;

1. If an organization (e.g. Hospital, large practice, etc) has more than one Tax ID/Billing NPI registered with the IME you can create one group that encompasses all Tax ID's or multiple groups.
  - a. If you have a common accounting practice for all Tax ID's / billing NPI's, then setting up one group is most likely the best solution.
  - b. If you have separate accounting for the Tax ID's, then you may want to consider setting up a group for each Tax ID.
2. The person setting up the group is the group owner and can administer who has access to what functionality within IMPA. The group administrator will be the person joining other users to the group, determining what applications the user has access to, and other basic administrative functions within the group. The group owner CANNOT create a new user from within their account. The user must self create a new account before the Administrator can add that user to a group. Over the next few months, the IME will be adding additional administrative capability such as adding an additional group administrator and changing the group owner.

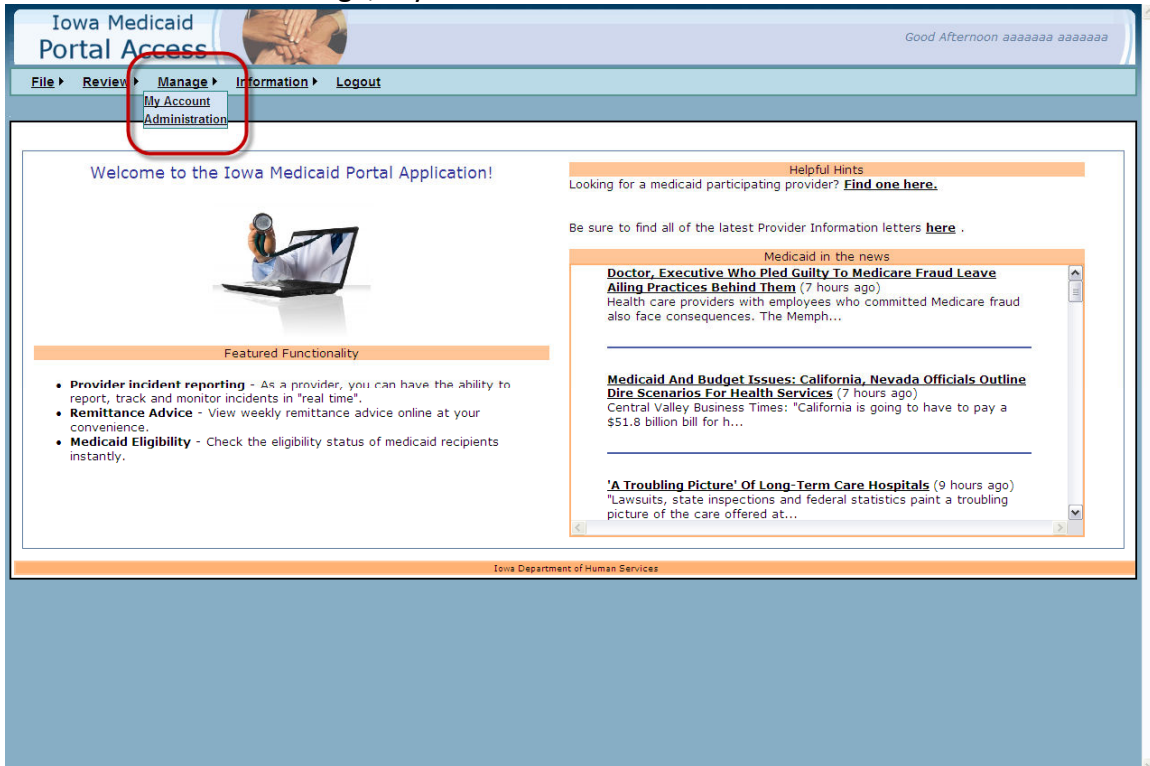
## Notes prior to Group Set up

1. You must be an existing, registered user within IMPA.
2. For access to some applications, you will need to have a valid Tax ID and NPI registered with the IME.
3. For electronic registration of a Tax ID, you must have the TCN from a recent (last 8 weeks) remittance advice for the appropriate NPI you wish to establish. Once the Tax ID is validated, you will have access to all billing NPI's associated with the Tax ID.
4. In the applications section (step 6 below) you will see any applications that are public or any you are qualified to see based on any Tax IDs you have registered.

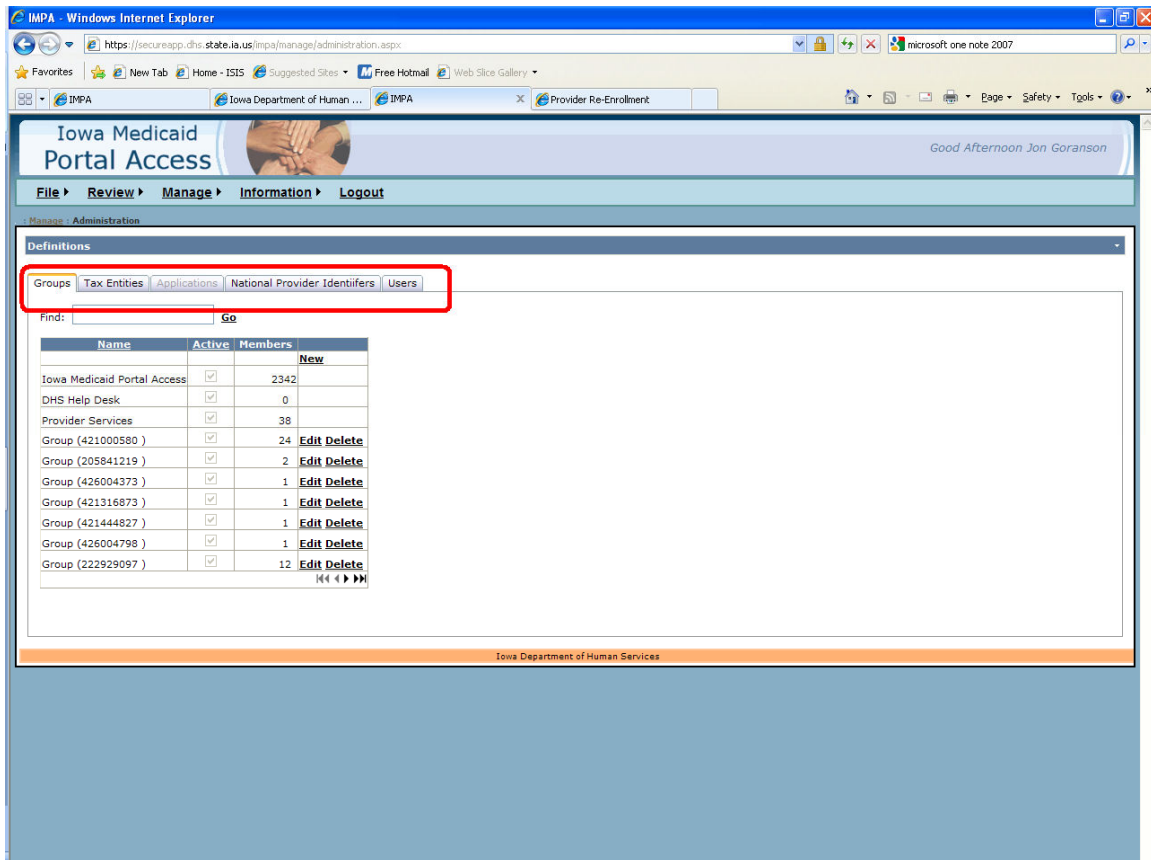
The IME will announce when new applications are available to all IMPA groups who are Registered Medicaid Providers.

## How to Set up a Group

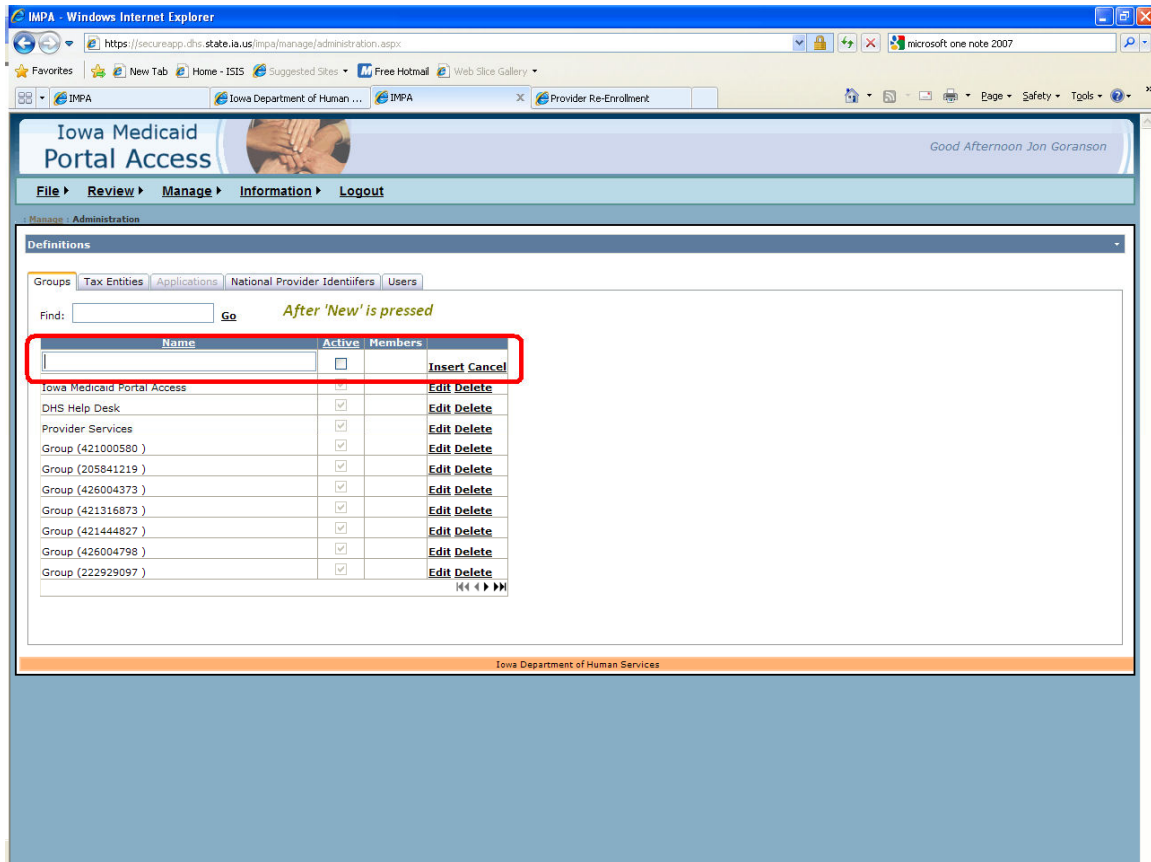
1. The person who is going to be the group owner must self-register within IMPA.
2. Once inside IMPA, there is a top menu line with the following main headings; File, Review, Manage, Information, and Logout. Some functionality will be grayed-out depending on what a group and/or user has access to. Hover the mouse over Manage; My Account and Administration. Select **Administration**.



3. At the Manage/Administration Screen, you will see 5 tabs; Groups, Tax Entities, Applications, National Provider Identifiers, and Users. From this menu, you can set up a group and establish its attributes.

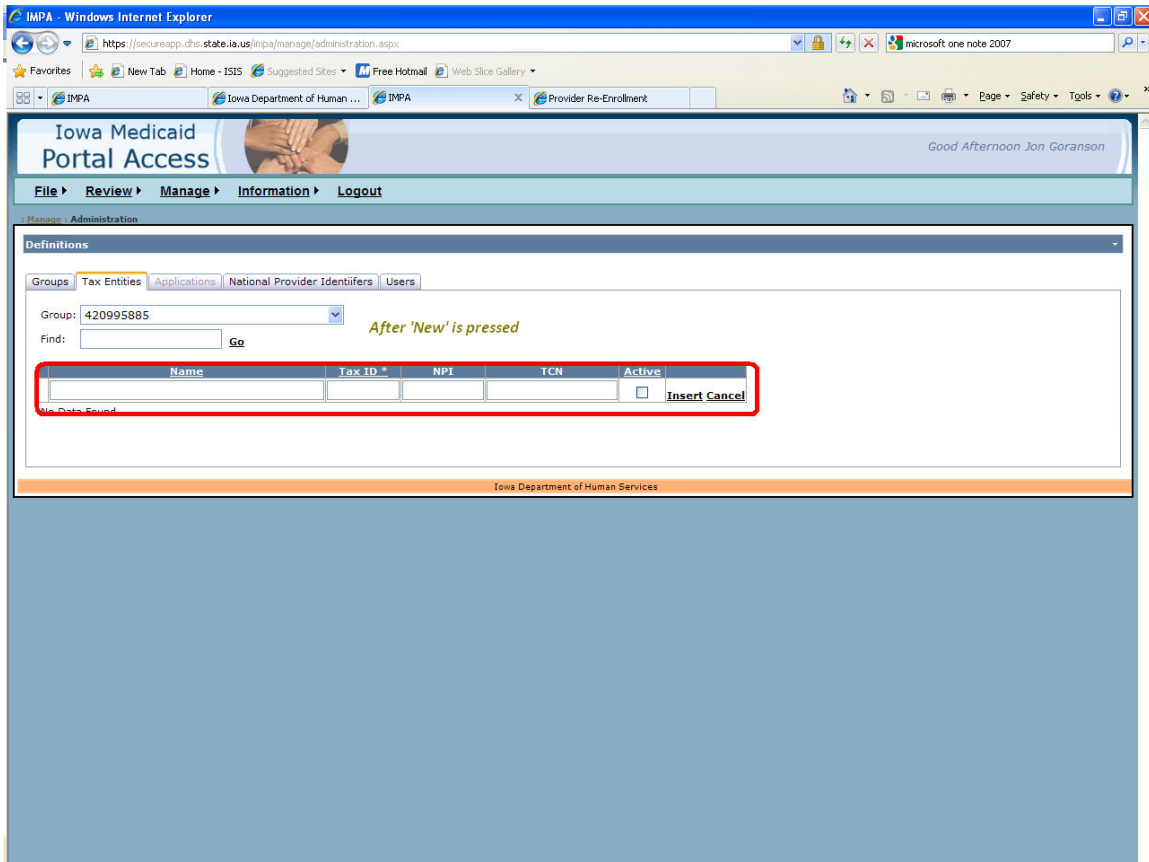


4. Create and Name the Group
  - a. Click on New
  - b. Type in the name you wish (e.g. Best Care Family Practice)
  - c. Check the Active check box
  - d. Click on Insert, this will create your named group. You are automatically added to the group. For a new group, you will see one user.
  - e. If you make a mistake, you can click on cancel, or once the group is created, you can change the name (e.g. shorten the name, correct the spelling, etc).
  - f. At this point, you can add another group if you are going to set up your organization with more than one group. Repeat A through D above.



## 5. Tax Entities

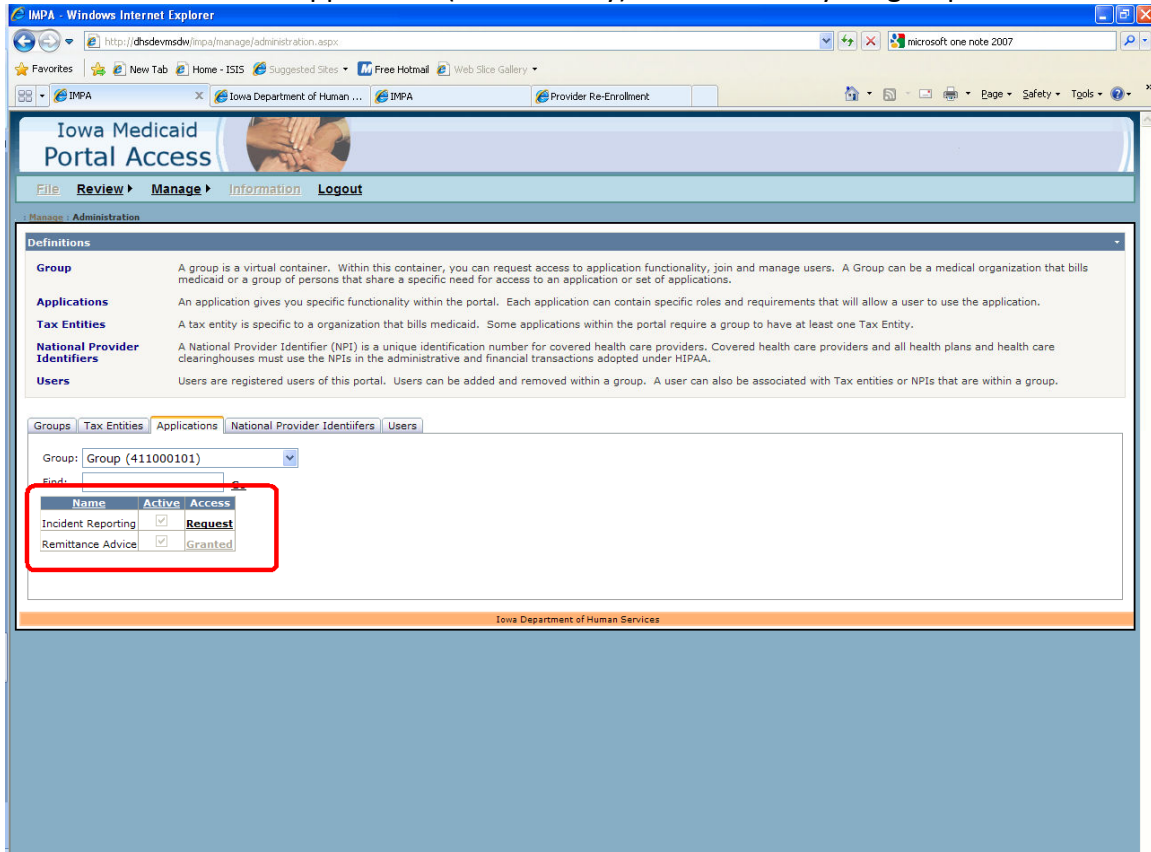
- a. Click on the Tax Entities Tab
- b. In the Group drop down box, you will see the named group(s) you established in step 4 above. If you created more than one group, select the group you want to add the Tax ID to.
- c. Click on New. This brings up an expanded line. You will need your billing NPI(s) and a TCN from a recent (last 8 weeks) remittance advice. The portal will validate your Tax ID, NPI, and TCN with information registered with the IME provider Services
- d. Enter the appropriate Information
  - i. Name – The name as registered with the Tax ID.
  - ii. Tax ID as one number, no dashes.
  - iii. NPI used for billing associated with the entered Tax ID.
  - iv. TCN from a recent (last 8 weeks) remittance advice where the entered NPI above was the NPI used for the Remit.
  - v. Check the active box.
  - vi. Click on insert. The entered information will be validated.
  - vii. Repeat the above steps if you have more than one Tax ID to associated with this group.
  - viii. If you have established more than one group, you can change the group in the drop down box and repeat the above steps for adding a Tax ID to the other group(s).



6. Select the applications you want your group to use. The initial applications (functionality) available on initial release are Incident Reporting and Electronic Remittance Advice. Over the next several months, we will be adding additional functionality. We will send an e-mail to group owners along with other posting when new applications are released within IMPA. Some functionality such as Remittance Advice, requires a Tax Entity to be established in order to access that application.
  - a. Click on Applications.
  - b. You will see a list of current applications that can be used by users within your group.
  - c. You will see the status of the application'
    - i. Request – This means your group is currently not approved for this functionality.
    - ii. Requested – This means your group has requested access, but has not yet been approved. Some applications (functionality) require IME Provider Services to review the request and make the granting decision.
    - iii. Granted – This means your group has been granted access to this application.
  - d. For the Applications you want access to, click on the Request button.



- i. If the applicable rules (e.g. correct Tax ID/NPI established in the Tax Entity Section) then your group will be granted access immediately and you will see the status block change to Granted.
- ii. For applications (functionality) requiring IME provider Services to verify additional information, you will be notified when the application (functionality) is available to your group.

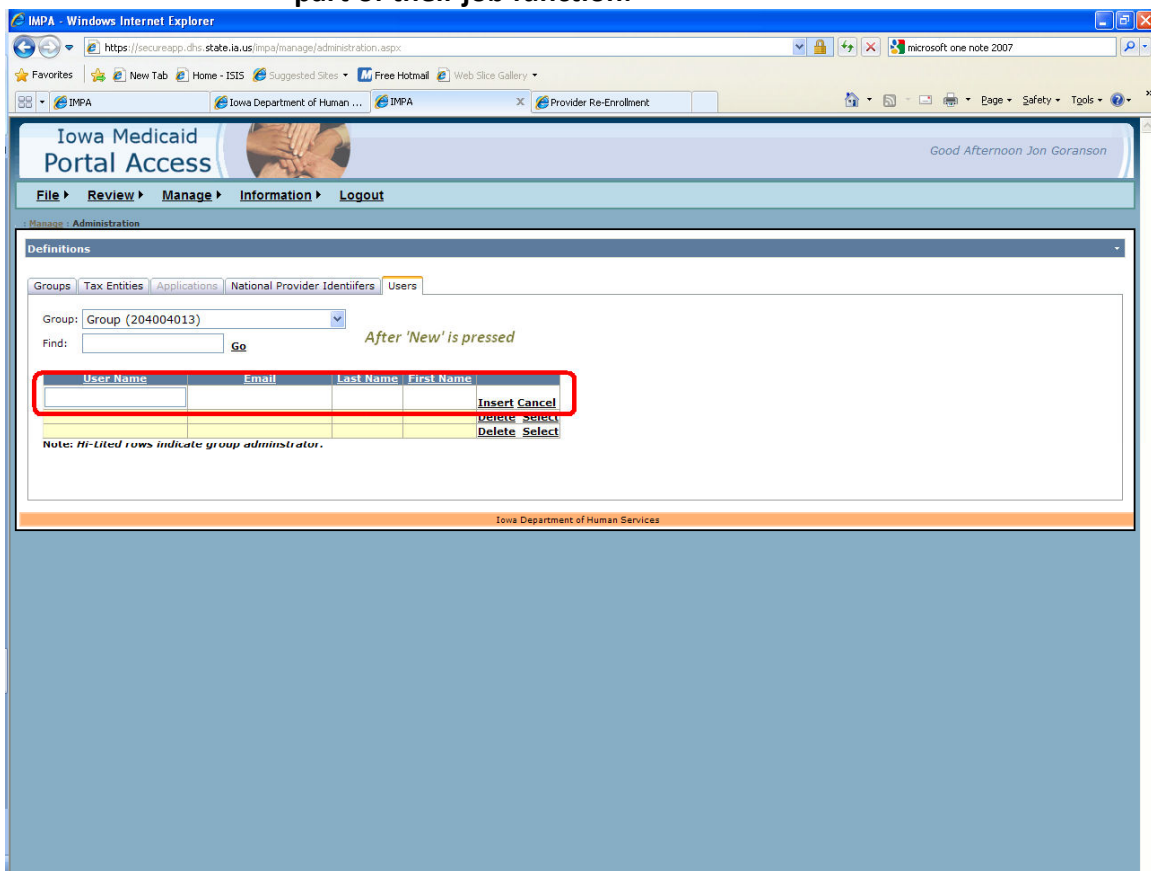


7. National Provider Identifiers. There is nothing to do here but review, if you added Tax Entity information. You will see a list of all NPI's associated with the named Tax Entity created in Step 5 above. If information is wrong, please contact provider services. Additional functionality will be released within the next few months for you to actively manage your NPI's and their registration with the IME.
8. Click on Users.
  - a. You will see your user ID as a user within the group. You can add as many users as you like, however, you must know their IMPA user name to add them to your group. If other planned users within your group have not yet registered with IMPA, they will need to register before you can add them to the group. You can actively manage your users at any time, so you can stop your group set up at this time and come back to it when others in your organization have self-registered and provided you with their IMPA user name. Add users as follows;
  - b. Click on New

- c. Type in the person's IMPA user name and click Insert.
- d. If the user name is correct, the user will be added. If the user does not exist (has not registered or a typo in the user name) then the insert will fail and you will get a system note that it failed. You can either correct the spelling or click cancel and confirm the person has registered and their IMPA user name.
- e. After joining a person to the group, you will need to establish what the person can do within your group. Until you establish what a user can do within your group, they will not be able to access any of the application you have established for the group.
- f. Click on Select (which shows up after you join the user) for the user you have joined to the group. This opens a dialog box with the functionality and roles you can grant to a user within your group. There is a drop down box that has the applications available to your group that you can enable access to for your users and then there are two tabs that show the role and NPI's associated.
  - i. Select the application you want to grant access to for the user from the application drop down box (e.g. Remittance Advice)
  - ii. Choose the role(s) you wish the user to have. For remittance advice, you can choose Administrator and/or User.
    - 1. Note: When Administrator Role is available, this provides the group owner the option of adding an administrator who can grant access to other users within the group.
    - 2. Note: When user Role is available, this is the normal, default role for the application.
    - 3. Note: For some applications (e.g. Incident Reporting) that have multiple roles you can select any of the roles you wish to assign to the selected user. If you have any questions about which roles are appropriate, please contact IME Provider Services.
    - 4. Note: Roles are established as part of our application development and roles determine what can be done within an application. Most applications will only have one role – User. However, when workflow is built into the application, it is common to see multiple roles.
  - iii. Click on the check box next to the role(s) you want the user to have for your group.
  - iv. Click on the NPI tab. This will list all NPI's available to your organization (based on the Tax ID information established in Step 5 above). You will see a list of NPI's with paging arrows at the bottom (if you have several NPI's). You will see the NPI, Taxonomy, Zip and LPN (Legacy Provider Number). This is the information that is already registered with the Tax ID. If there are errors in the NPI, Taxonomy, or Zip, please contact IME Provider

Services. The LPN is currently shown and will be phased out over time.

- v. You can choose All, None, or Select specific NPI's for the user to have access to. For example, if you have one Tax ID, 3 NPI's associated with the Tax ID, there will be 3 presented. If you have user that you want to restrict to only one or more but less than all of the NPI's, you can individually check those boxes.
- vi. Repeat the above steps for each application (functionality) you want the user to have and repeat for each user you have added to your Group.
- vii. **Note: For most groups, you will choose the "All" for NPI's. We added this functionality in preparation for the additional security structures that will be required for implementation of other applications within the portal and enabling HIT/HIE Electronic Health Records in the future. This enables a group owner to actively choose what information users can access as part of their job function.**



- 9. You are finished. If at any point it time, you have problems or questions, you can contact IME Provider Services via the call center or e-mail.