How to Submit a Manage Change Request adding a Service Location and Affiliate an Individual Provider Record to a Group/Organization in NCTracks

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Overview

The process of adding a Service Location and Affiliation allows a group or organization to bill and receive payments on behalf of an individual Rendering/Attending provider in the NCTracks system. The affiliation and service location is managed by the Individual providers by using the Manage Change Request process. This guide provides step-by-step instructions for adding a Service Location and affiliating an individual provider record to an organization/group provider record in NCTracks.

	Certain types of changes will route the application to CSRA for review and approval. For example, adding taxonomy will require credentialing. Adding a new managing employee requires that a background investigation be completed.

Logging into the Provider Portal

1. Navigate to www.nctracks.nc.gov

2. The following page will display. Click the Providers tab at the top of the page.

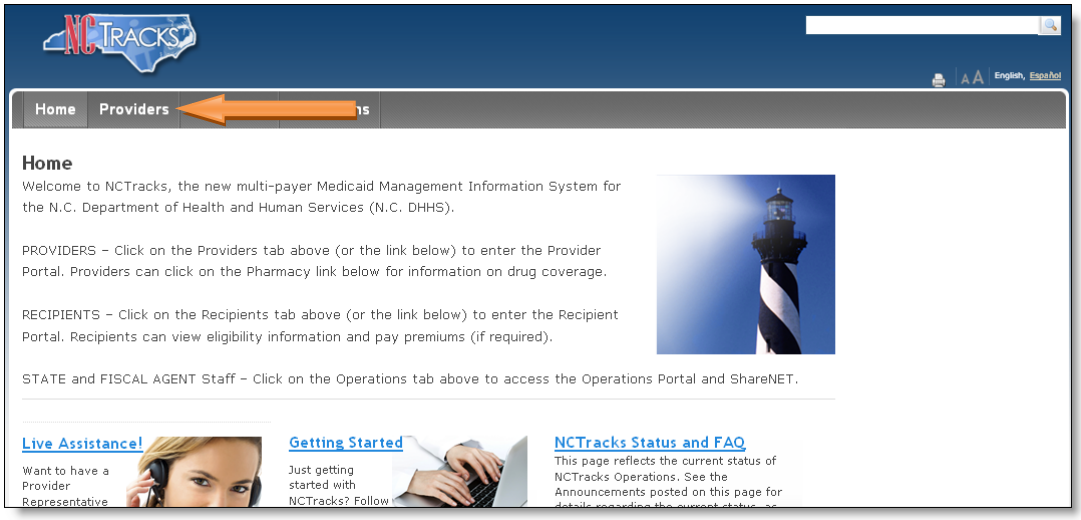

Figure 1: NCTracks Home

3. From the **Providers** page, click the NCTracks Secure Portal icon.

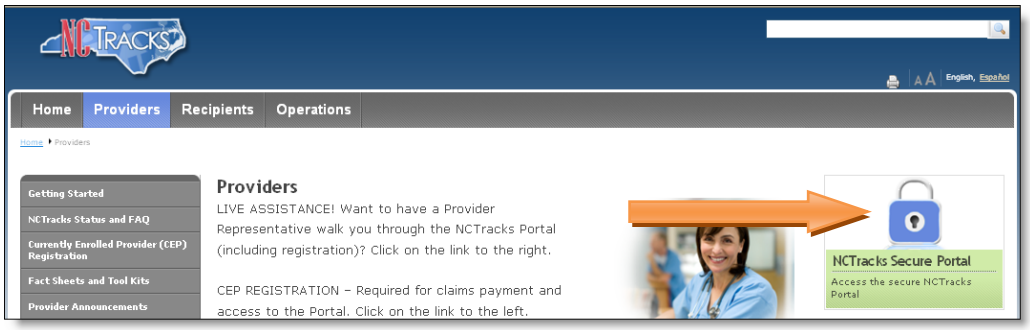

Figure 2: Providers Page

4. The following login screen will display. Enter the NCID and password and click the **Log in** button.

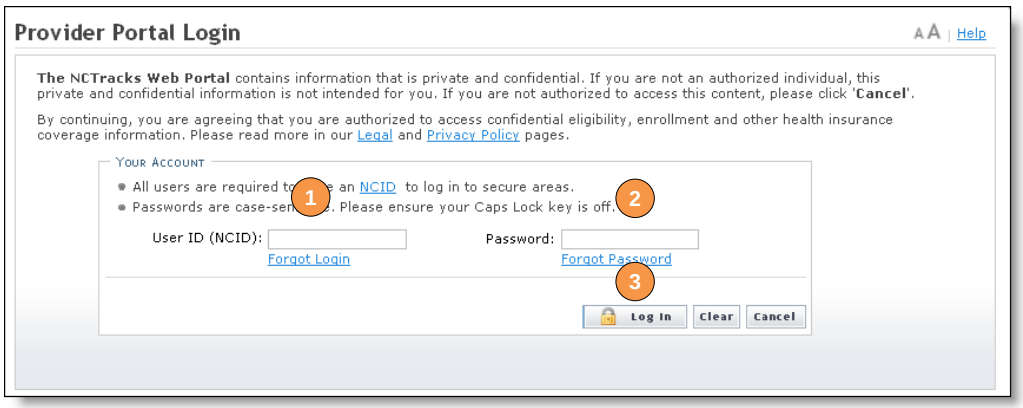

Figure 3: Provider Portal Login

Accessing the Manage Change Request Application

5. The following Providers page will display. Click the **Status and Management** button.

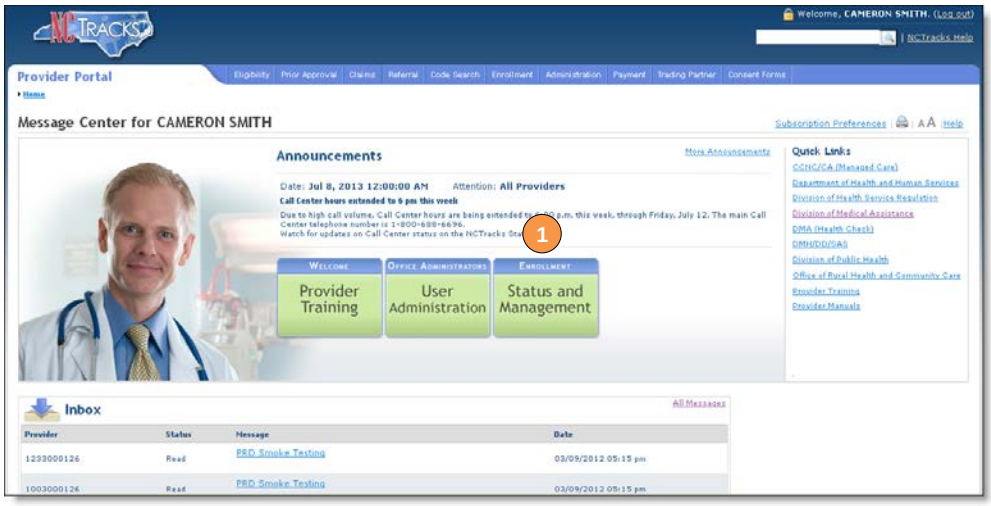

Figure 4: Select Status and Management

6. The **Status and Management** screen will display. The screen is divided into 7 sections.

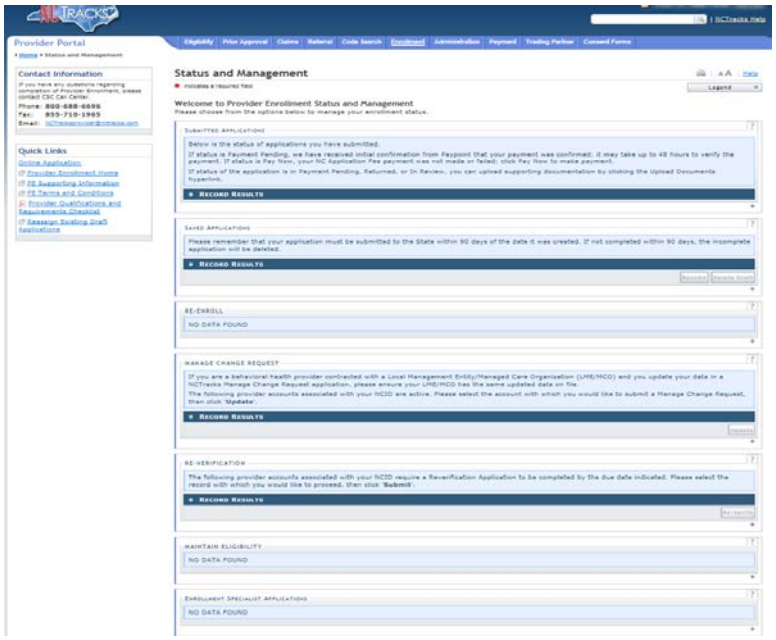

Figure 5: Status and Management Page

Status and Management Sections

Submitted Applications: Displays a list of applications that have been previously submitted.

Saved Applications: Displays a list of applications that have been started but not yet submitted. Please remember that your application must be submitted to the State within 90 days of the date it was created. If not completed within 90 days, the incomplete application will be deleted. It will also be deleted if the Fiscal Agent Operations (CSRA) makes a change to the

provider record. If this occurs, you will receive a notification message when attempting to resume the application.

Re-enroll: This section will list provider accounts associated with the user's NCID that have been terminated. The user can select the account to re-enroll, then click 'Submit'.

Manage Change Request: This section will list provider accounts associated with the user's NCID that are active.

Re-verification: This section allows the user to submit a required re-verification application for a provider enrollment account.

Maintain Eligibility: This section allows the user to submit a required maintain eligibility application for a provider enrollment account.

Enrollment Specialist Applications: The Assigned Applications section lists applications (Enrollment, Re-enrollment, Manage Change Request, Re-verification, and Maintain Eligibility) in which the Office Administrator (OA) assigned to an Enrollment Specialist to complete.

1. To begin a new **Manage Change Request**, under the **Manage Change Request** Section, click the radio button next to the NPI to be changed.

2. Next, click the **Update** button.

	If the Manage Change Request section reads **NO DATA FOUND**, it is possible that a Manage Change Request has already been created, but not yet approved. Check the **Submitted Applications** and **Saved Application**s sections for a Manage Change Request/Enrollment that is already in process.

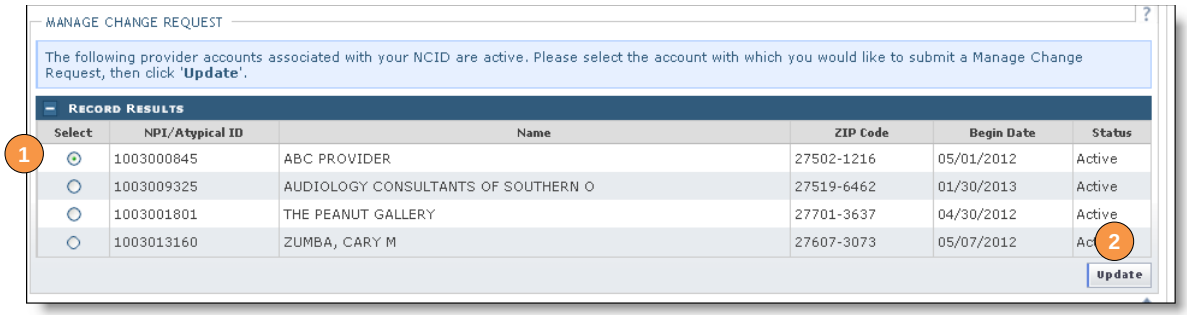

Figure 6: Select Manage Change Request

3. Under requested **Manage Change Request type** you will select **Complete multiple changes or review your complete provider record.**

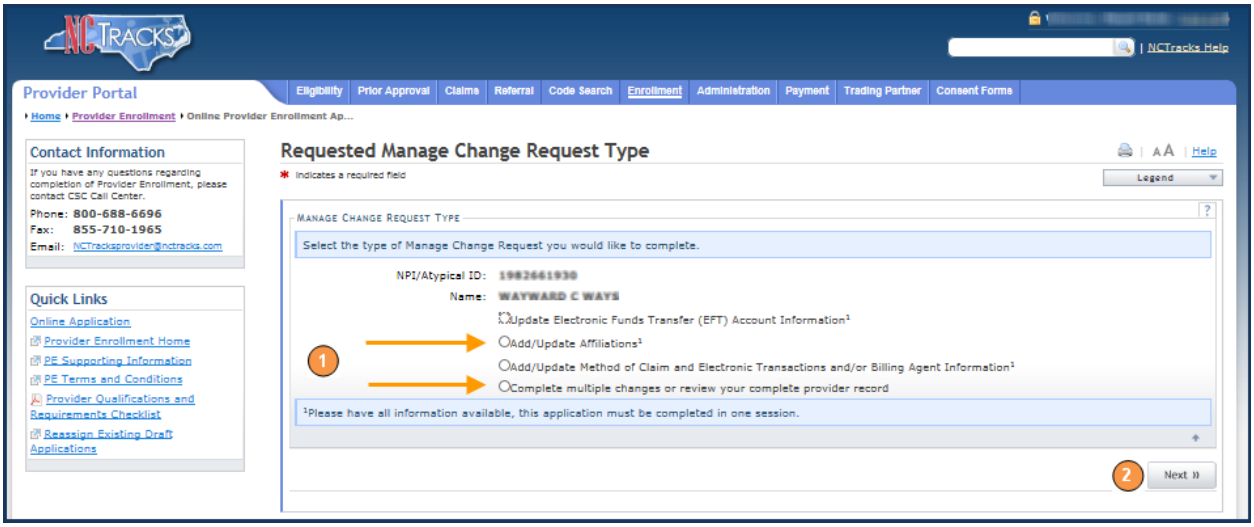

Figure 7: Requested Manage change Request Type

	Note: There is an option to Add/update affiliations. If the user chooses to submit the abbreviated application to "Add/Update Affiliations", this application will only affiliate the individual Provider NPI permitting the Organization to bill and receive payment for services rendered by the Individual Provider. Completing this application will not automatically add the service location of the Organization.

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4. The **Individual Basic Information** screen will display. Click the "Next" button to continue.

	Do NOT click the menu options on the left-hand side of the screen to advance to the next section. It is required that each box has a check mark before the Manage Change Request can be submitted. Instead, navigate to the appropriate section; click the Next button on the bottom right corner of the screen to advance to the next section.

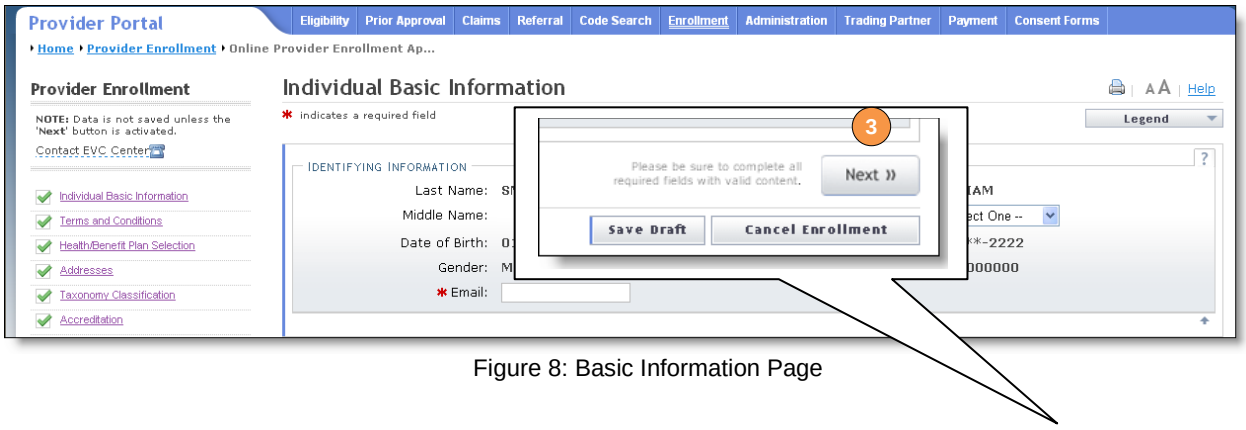


Figure 8: Basic Information Page

5. On the Terms and conditions page, to attest and accept Medicaid Terms and Agreements, click the check box.

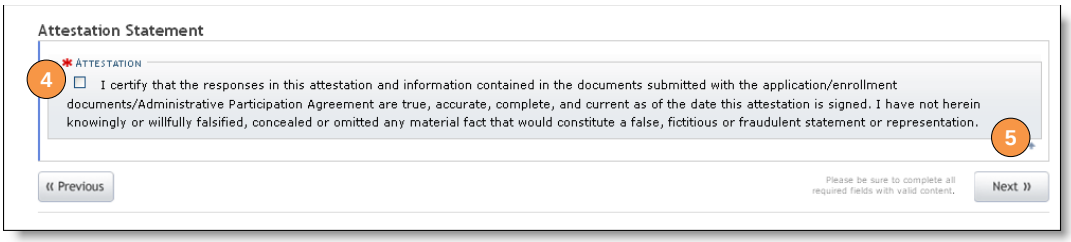


Figure 8: Attestation Statement

Adding Service Locations

6. To add an additional Service Location
   6.1. Select Yes
   6.2. Enter the address
   6.3. Verify the Address
   6.4. Select Add to add the location

	To ensure the accuracy of the address, the **Manage Change Request** verifies the entered information against the United States Postal Service (USPS) database. As long as the address matches the USPS database, the **Addresses** screen will refresh with the new address.

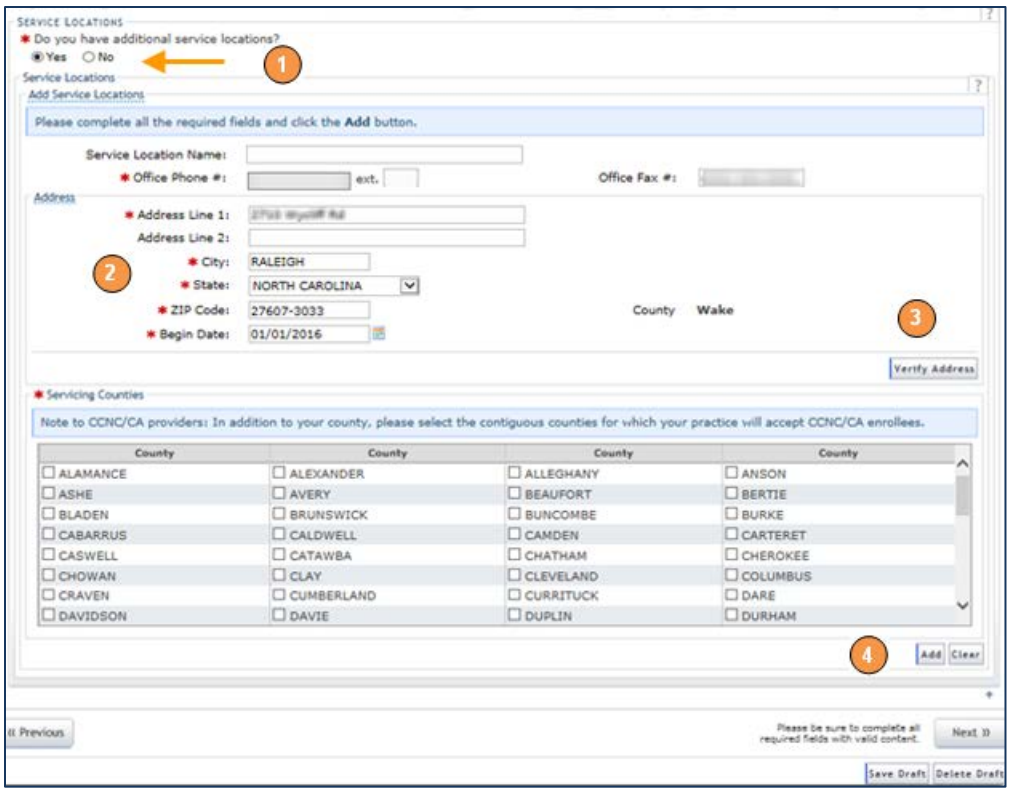


Figure 9: Adding Additional Service Locations

	Since the user has added a Second service location the provider will see the following box at the top of each page until the Method of Claims Submission page is reached. Each location should be shown as "Completed" before proceeding to the next page.

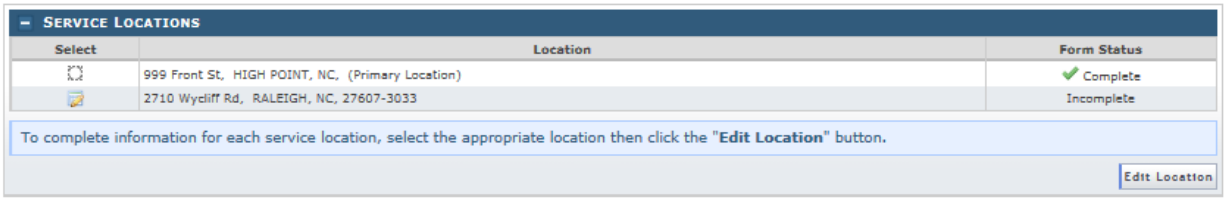


Figure 10: Service location

Adding a New Taxonomy Code:

8. To add a new Taxonomy, under the **Add Taxonomy Classification** section reference the following steps:
   8.1. Select the Provider Type
   8.2. Select the Classification (if available)
   8.3. Select the Area of Specialization (if available)
   8.4. Enter or select the **Begin Date**
   8.5. Click the **Add** button
   8.6. Click the next to the accreditation page

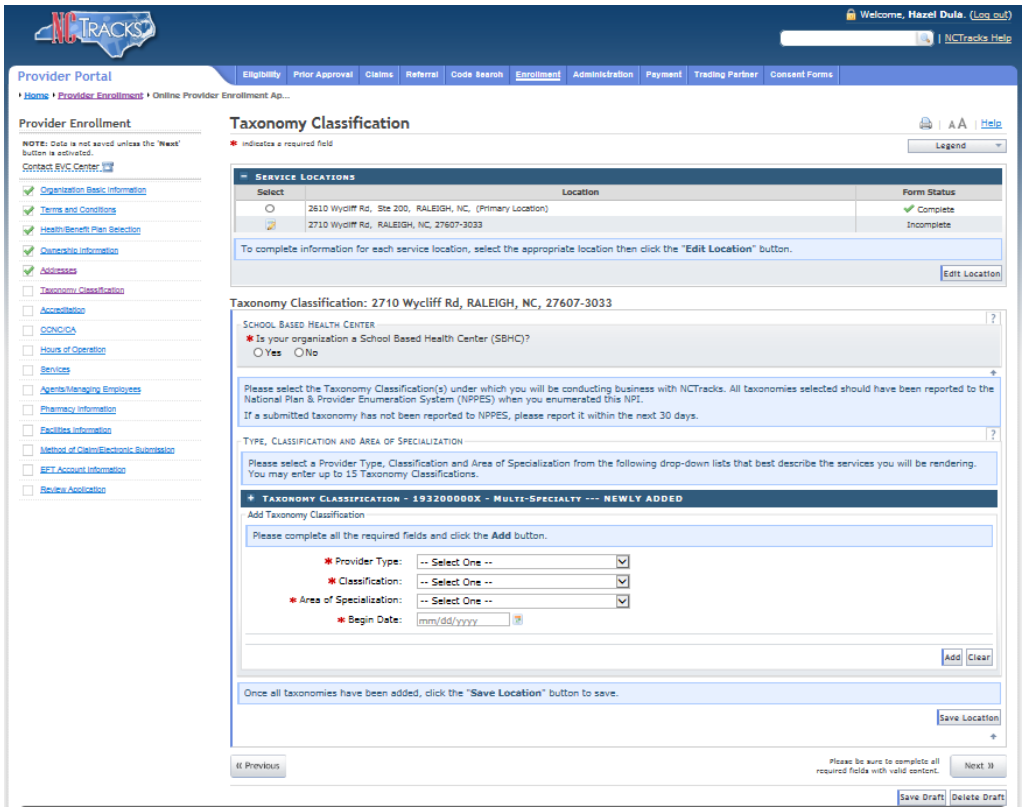


Figure 11: Taxonomy Classification

Adding Accreditation Information:

9. Accreditation Page:

9.1 Enter the License agency
9.2 Enter the License type
9.3 Enter the State of the license
9.4 Enter the License number
9.5 Enter the Effective date
9.6 Select Add
9.7 Save Location

	Once the **Accreditation Page** is displayed, the service location box (shown in Figure 10) will be present and will default to update the new location. However, if a selection is made to update the existing service location, there will be an option to "**Copy this license to all service locations**". Click the **Next** button. Continue to click the **Next** button until you reach the "Affiliated Provider Information" screen.

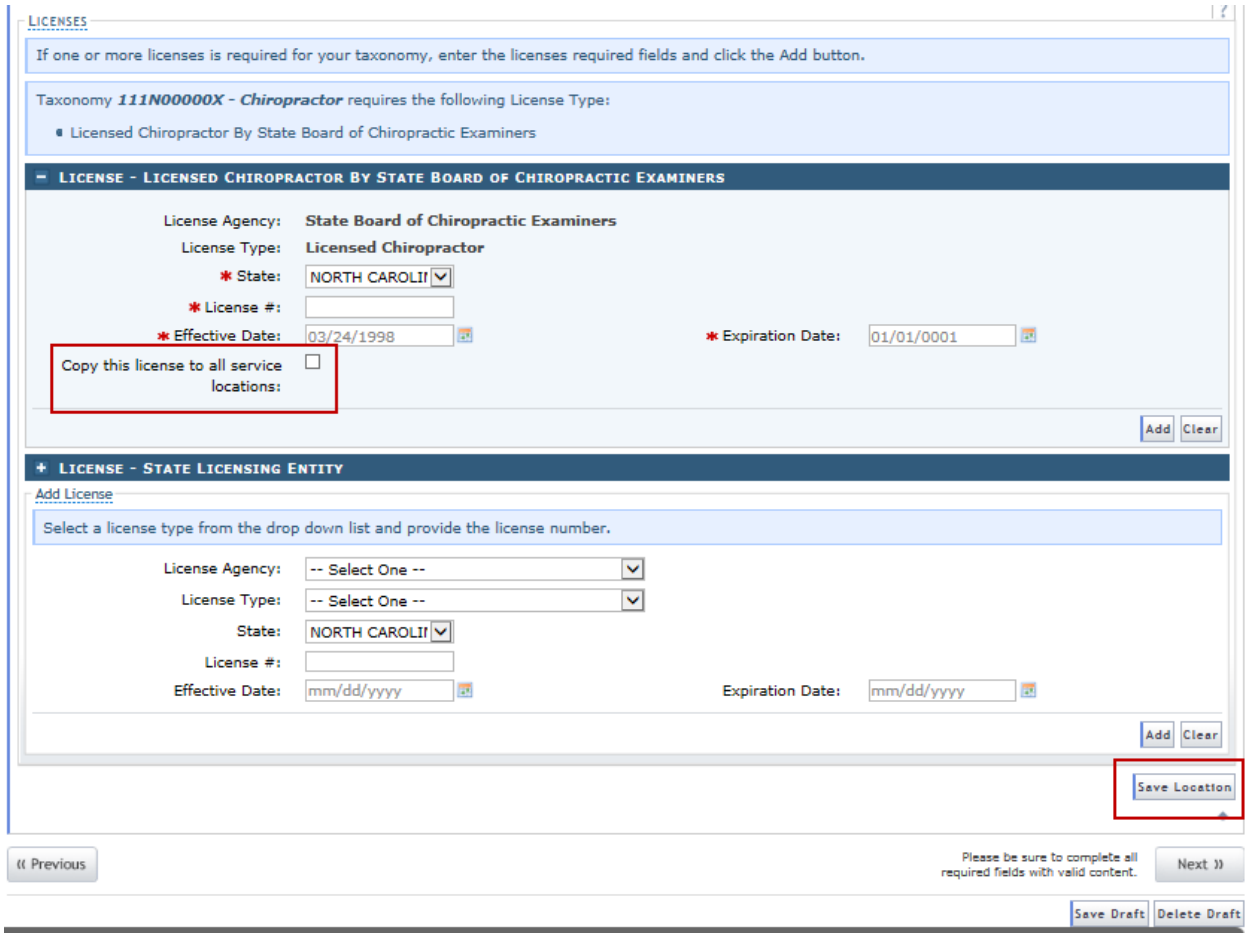


Figure 12: Accreditation Page

1. The **Affiliated Provider Information** screen will display. To display the search option, click the **Yes** radio option illustrated below.

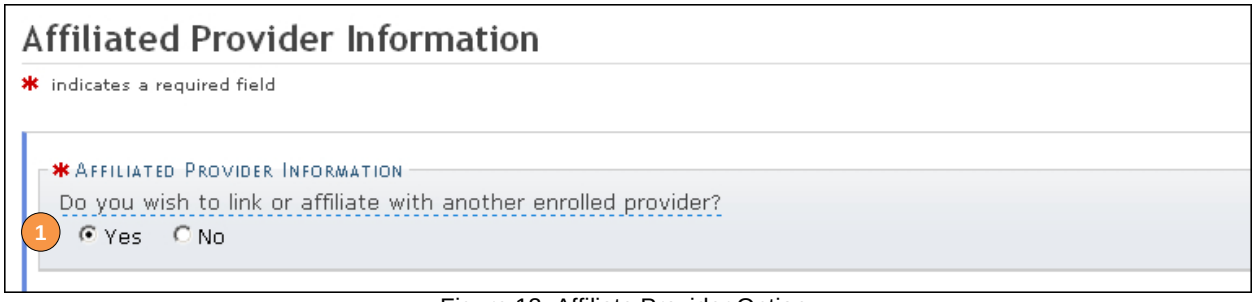


Figure 13: Affiliate Provider Option

2. Once you reach the **Affiliated Provider Information** page, enter the Group/Organization NPI in the search field.
3. Click the **Lookup NPI** button.

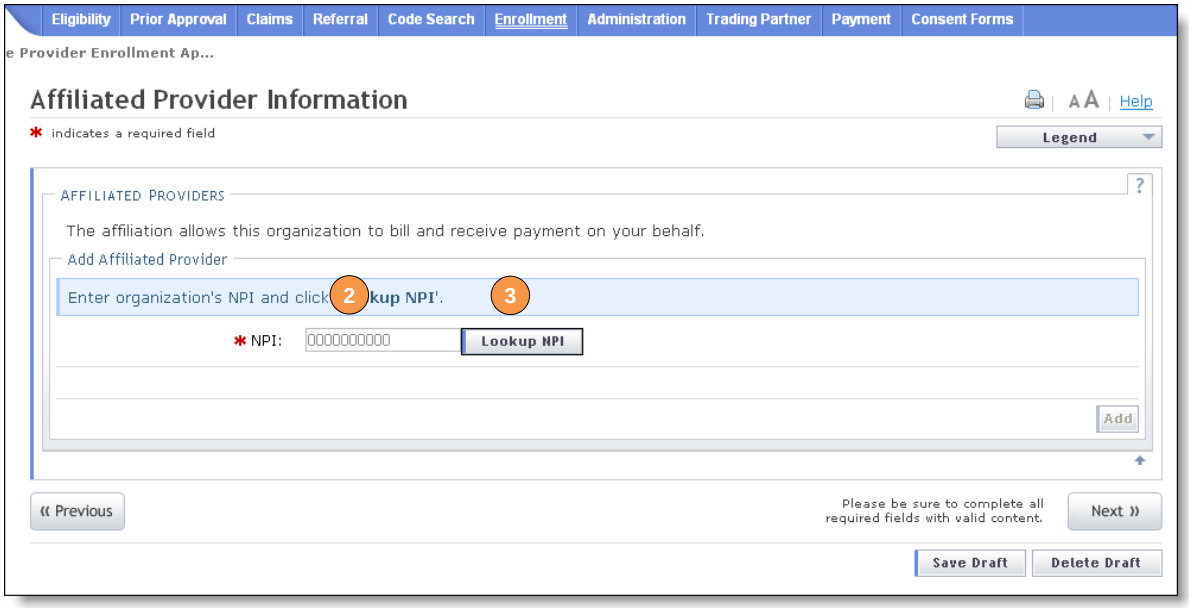


Figure 14: Affiliated Provider Information Page

Adding the Group/Organization NPI

4. The search results will display. Click the checkbox next to the appropriate provider location(s).

	The provider organization to which you are affiliating must be first be enrolled in Medicaid. If you are not able to locate the provider record using the search criteria, check with the provider organization to ensure their enrollment has been fully completed and approved.

5. Click the **Add** button in the bottom right corner of the window.

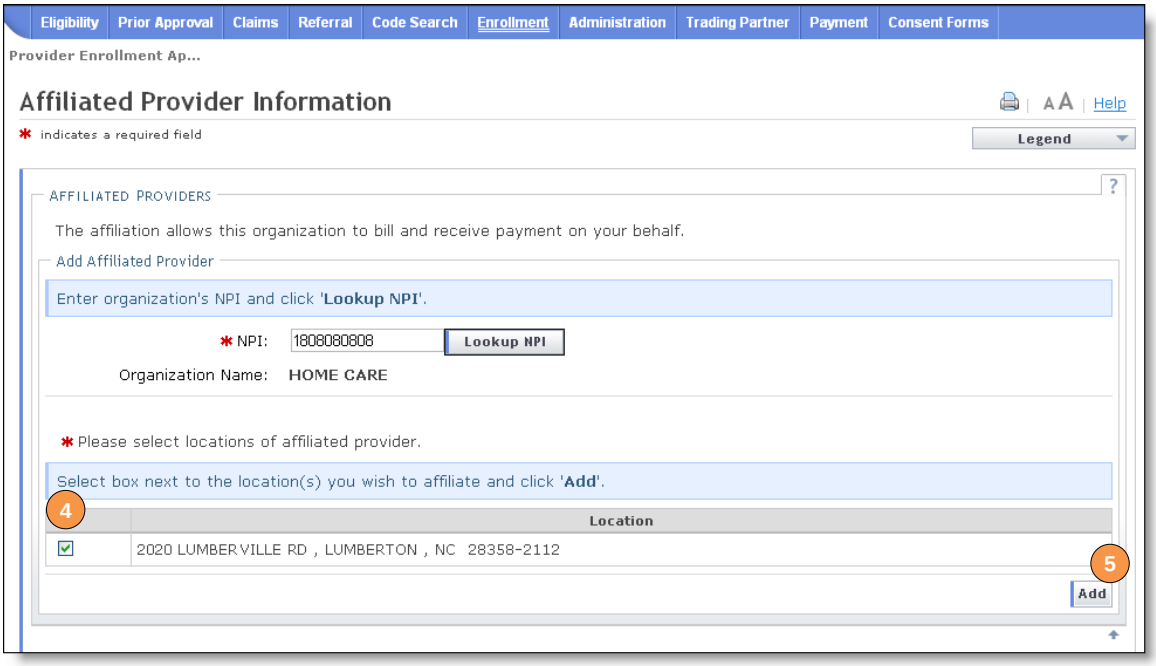


Figure 15: Search Results

6. The provider will be added on the dark blue bar, as illustrated below. To review the provider, click the plus sign on the dark blue bar.

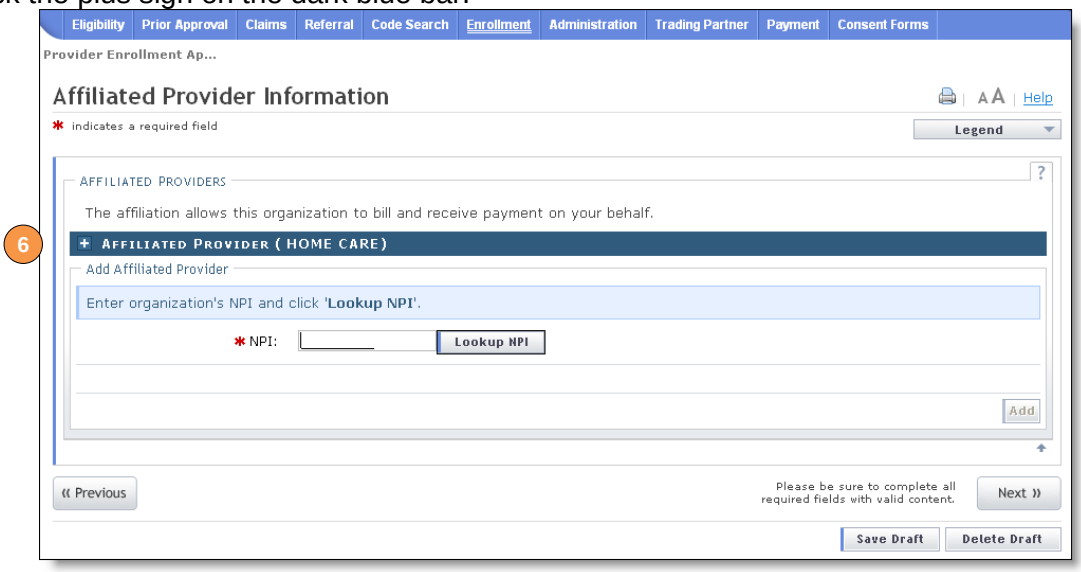


Figure 16: Affiliation Completed

7. The affiliated provider details will display. To delete the provider, click the **Delete** button.

	The **Delete** button is ONLY available until you submit the Manage Change Request application. Once a provider affiliation has been processed, the affiliated provider cannot be completely removed from the individual provider record. It can only be end-dated.

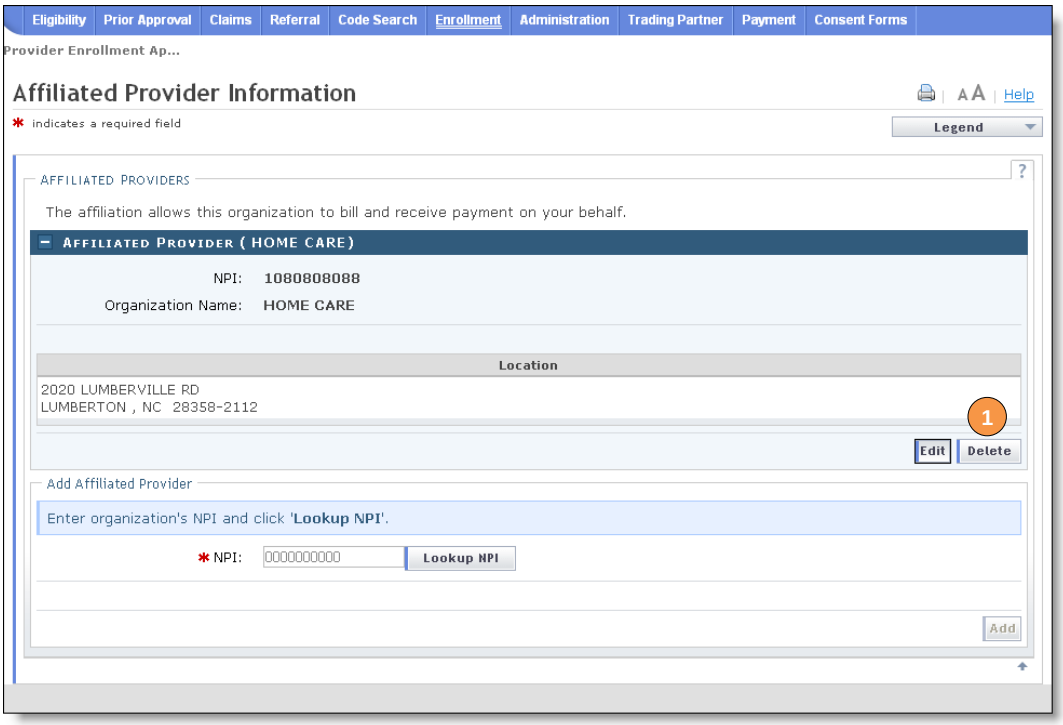


Figure 16: Deleting an Affiliated Provider

End-Dating the Group/Organization Affiliation

	Once a provider affiliation has been processed, the affiliated provider cannot be completely removed or deleted from the individual provider record. It can only be end-dated.

8. To edit the provider, click the “Edit” button in the bottom right corner.

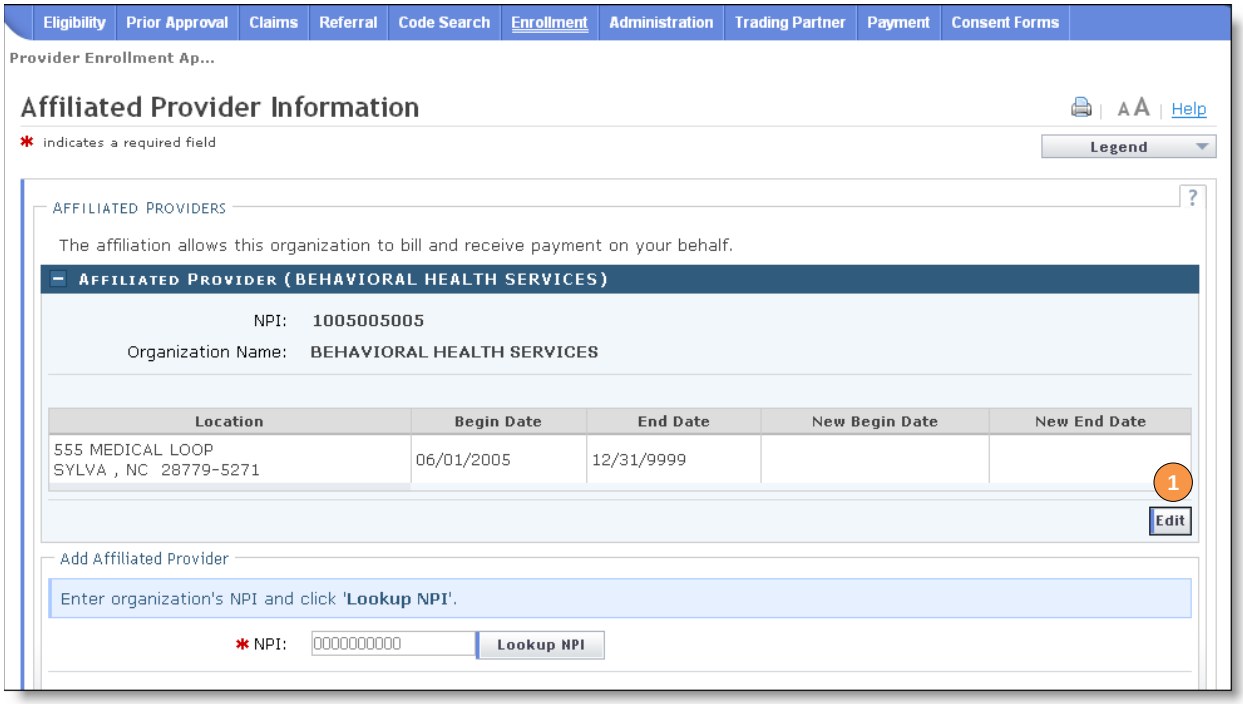


Figure 17: Select Edit

9. Select the “End Date” and click the “Save” button.

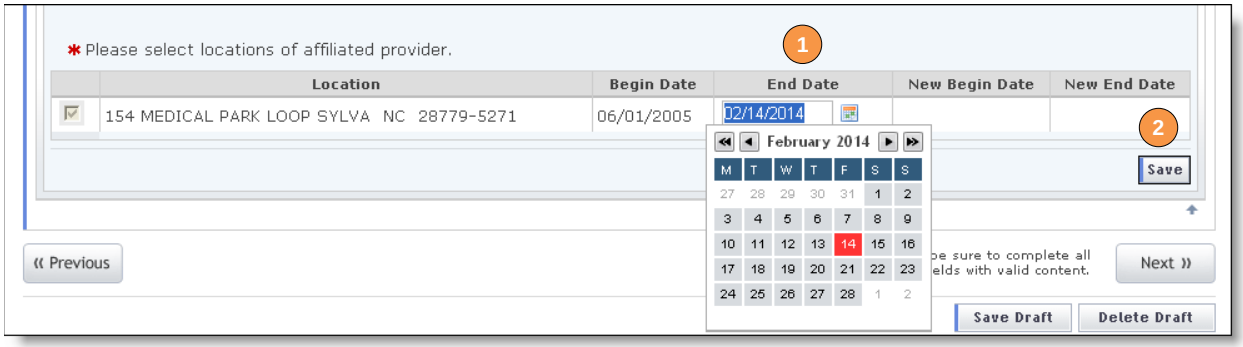


Figure 18: Select End Date

10. Click the “Next” button to continue.

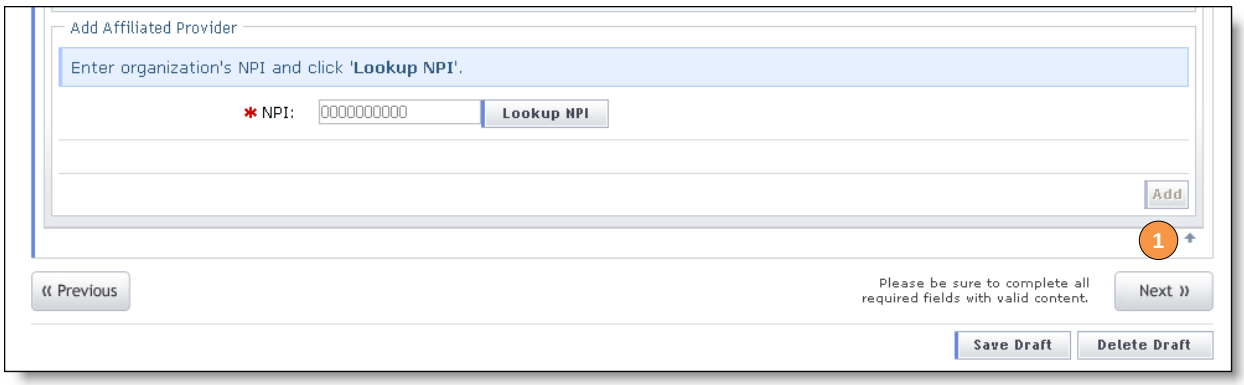


Figure 19: Click “Next”

Reviewing the Manage Change Request

1. The “Review Application” screen will display. On the left hand margin, verify that all application pages have a green check mark next to each page. In addition, verify the contact email address listed on the page. This can be updated on the **Basic Information** page.

   To review the application in Adobe PDF format, click the **Review Application** button. Click the **Next** button to proceed to the **Attachments/Submit Electronic Application** page.

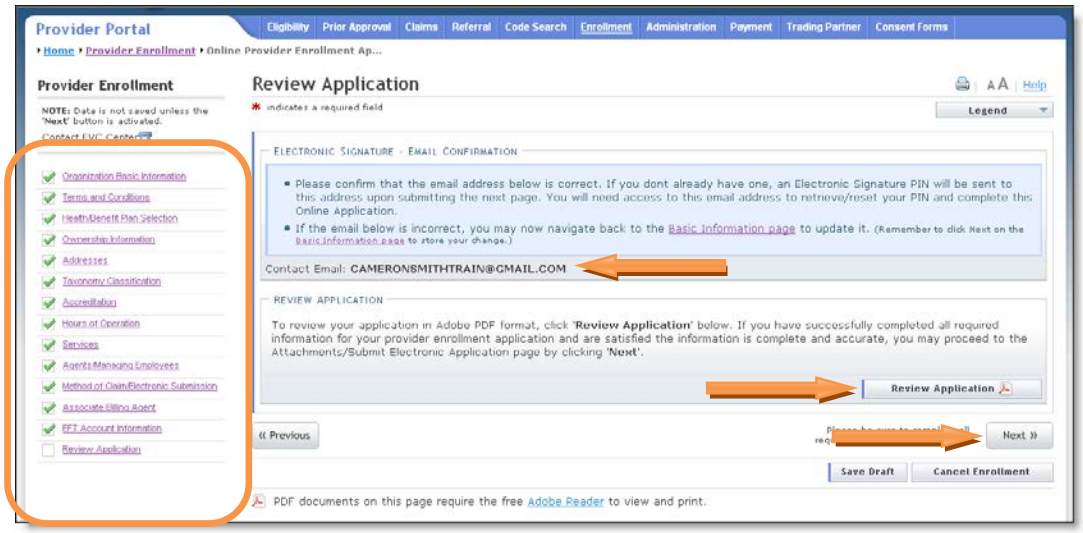
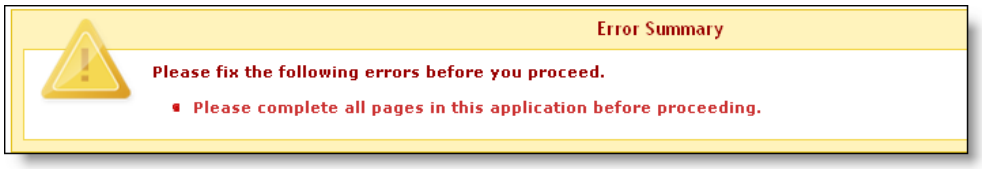


Figure 20: Review Application

Manage Change Request - Navigation Error

All pages must be reviewed prior to continuing. If you receive the following error, click on the pages that do not have check marks next to the section and click **Next** through each section.

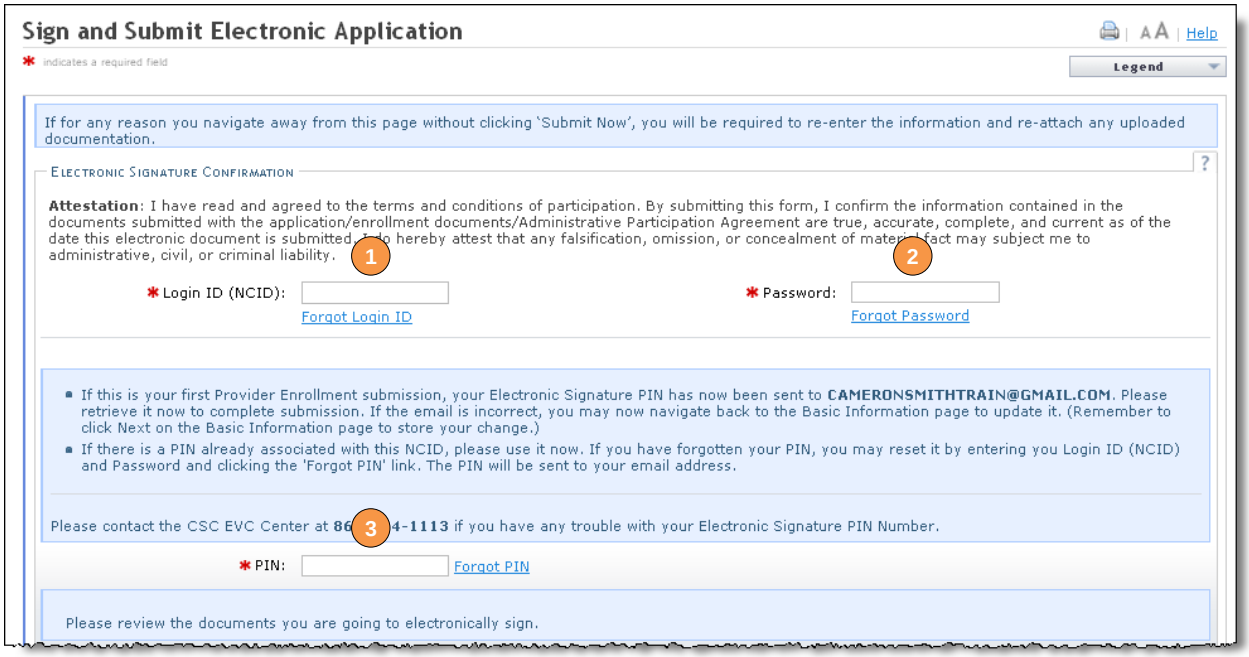


Complete all Pages in the Application

Figure 21: Review Application - Incomplete Pages

Signing and Submitting the Manage Change Request

1. The **Sign and Submit Electronic Application** page will display.
2. Enter your NCID and password, as well as the **PIN**. Click the **Submit Now** button.



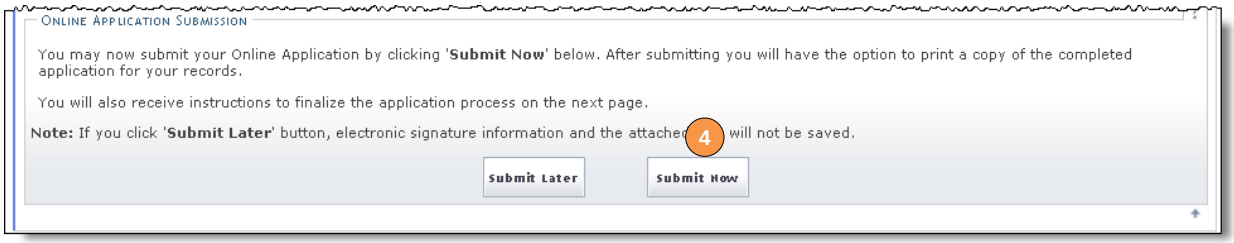


Figure 22: Sign and Submit

Printing the Application

1. The **Final Steps** page will display. You may click on the links below to print or save a copy of the application or cover sheet in PDF format.

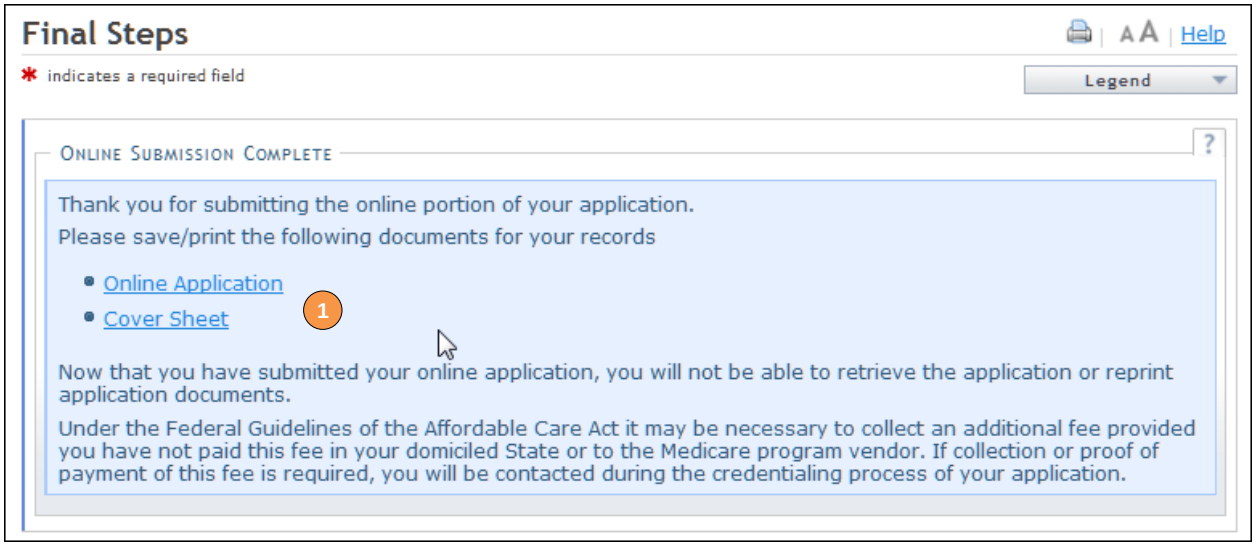
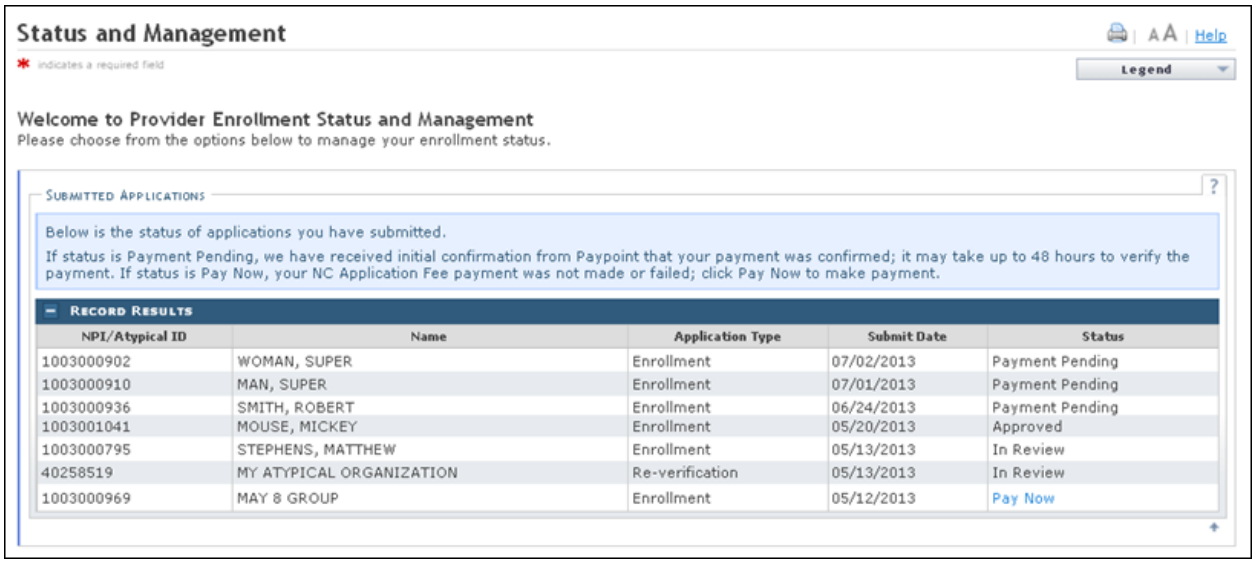


Figure 23: Final Steps Page

Application Status

To verify the status of the Manage Change Request, navigate to the Status and Management page in NCTracks. If the affiliation was the <u>only</u> change made to the individual provider record, the status should read **Approved**. This indicates that the affiliation has been completed. If adding service locations and/or other changes were made to the individual provider's record, the status may read **In Review.** This indicates that the other changes require CSRA to review or credential the Manage Change Request. You may check periodically to review the status.



NPI/Atypical ID	Name	Application Type	Submit Date	Status
1003000902	WOMAN, SUPER	Enrollment	07/02/2013	Payment Pending
1003000910	MAN, SUPER	Enrollment	07/01/2013	Payment Pending
1003000936	SMITH, ROBERT	Enrollment	06/24/2013	Payment Pending
1003001041	MOUSE, MICKEY	Enrollment	05/20/2013	Approved
1003000795	STEPHENS, MATTHEW	Enrollment	05/13/2013	In Review
40258519	MY ATYPICAL ORGANIZATION	Re-verification	05/13/2013	In Review
1003000969	MAY 8 GROUP	Enrollment	05/12/2013	Pay Now