Provider Services Portal-Milestone 2

Overview

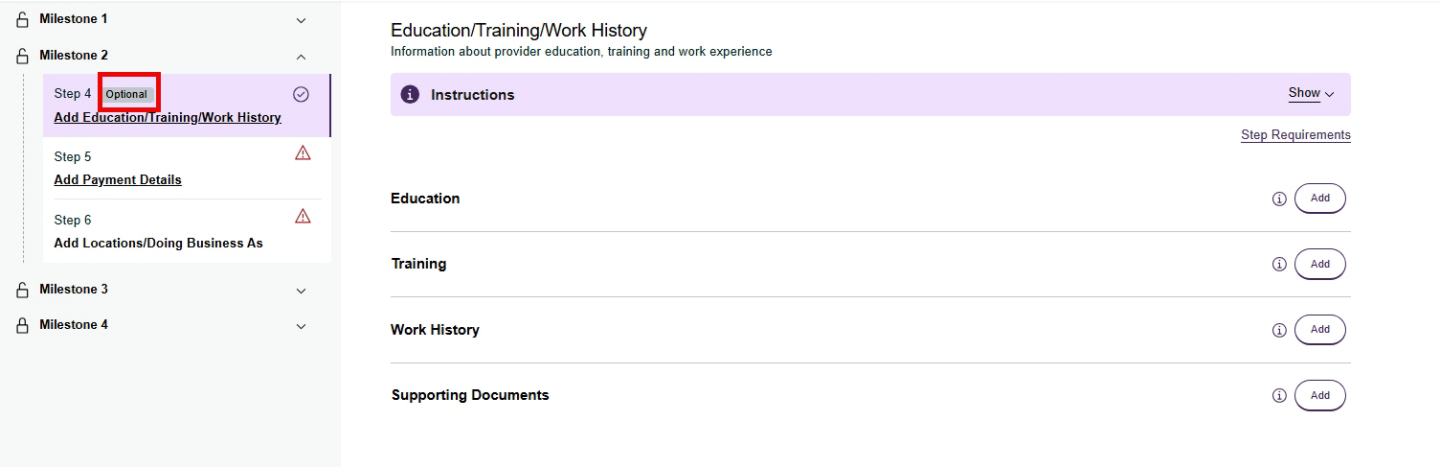
This document overviews Milestone 2 of a new application being submitted in the Provider Services Portal. Applications are broken down into 4 milestones that must be completed before submission of an application for review.

Note: At this time the portal is only allowing enrollment for providers who have never been enrolled in NYS Medicaid and is currently limited to individual practitioners. Groups, businesses and institutions will come at a later date.

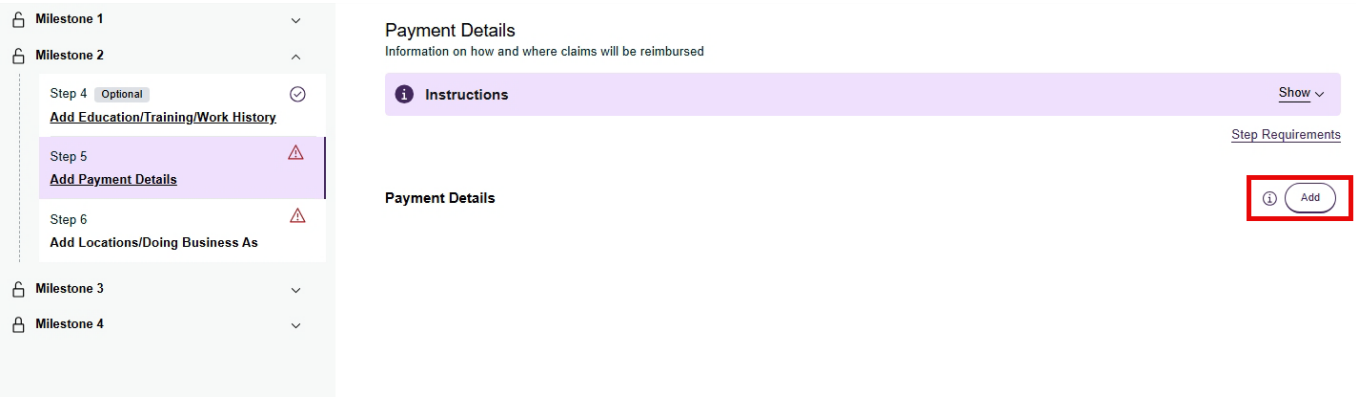
Milestone 2 of an application

Milestone 2 of an application is broken down into steps 4-6. Steps that are optional will be marked as so on the left-hand menu next to the step number.

Step 4 of Milestone 2 is for adding education/training/work history. This is an optional step. **Click** the show button arrow on the purple instructions banner to display instructions relating to this step.



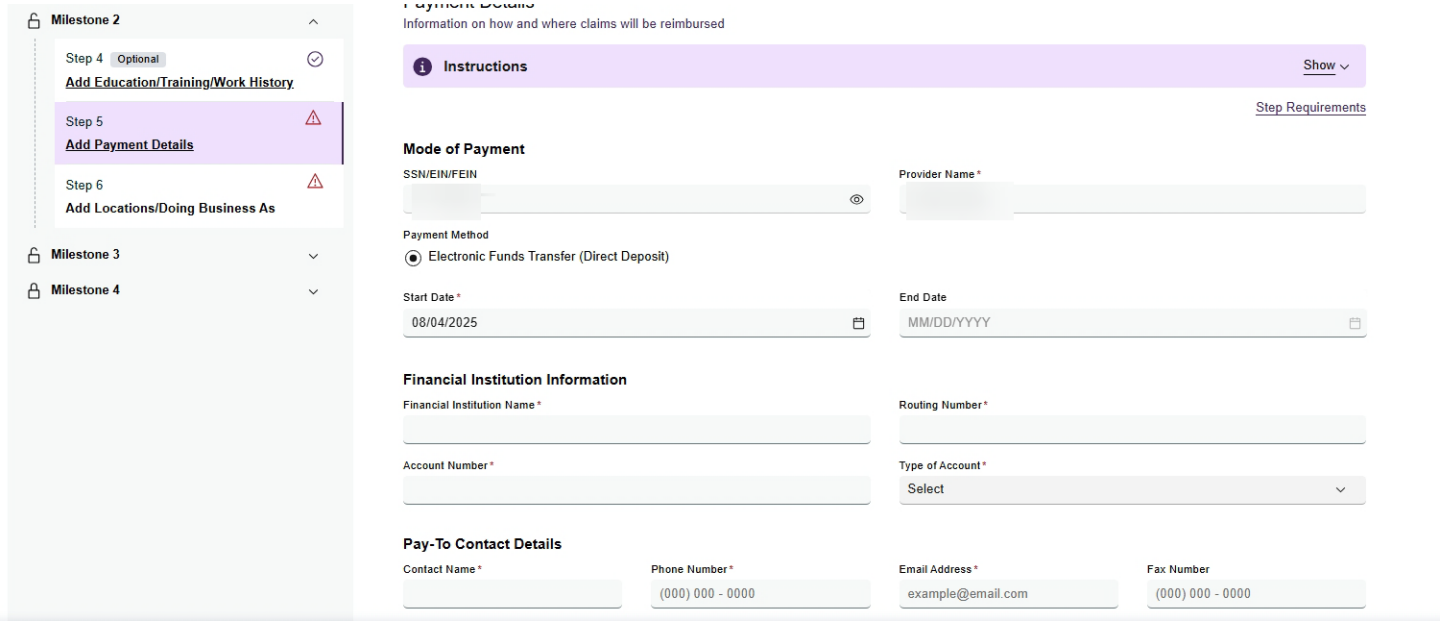
Step 5 of Milestone 2 is for adding payment details. **Click** Add at the bottom right to begin this step.



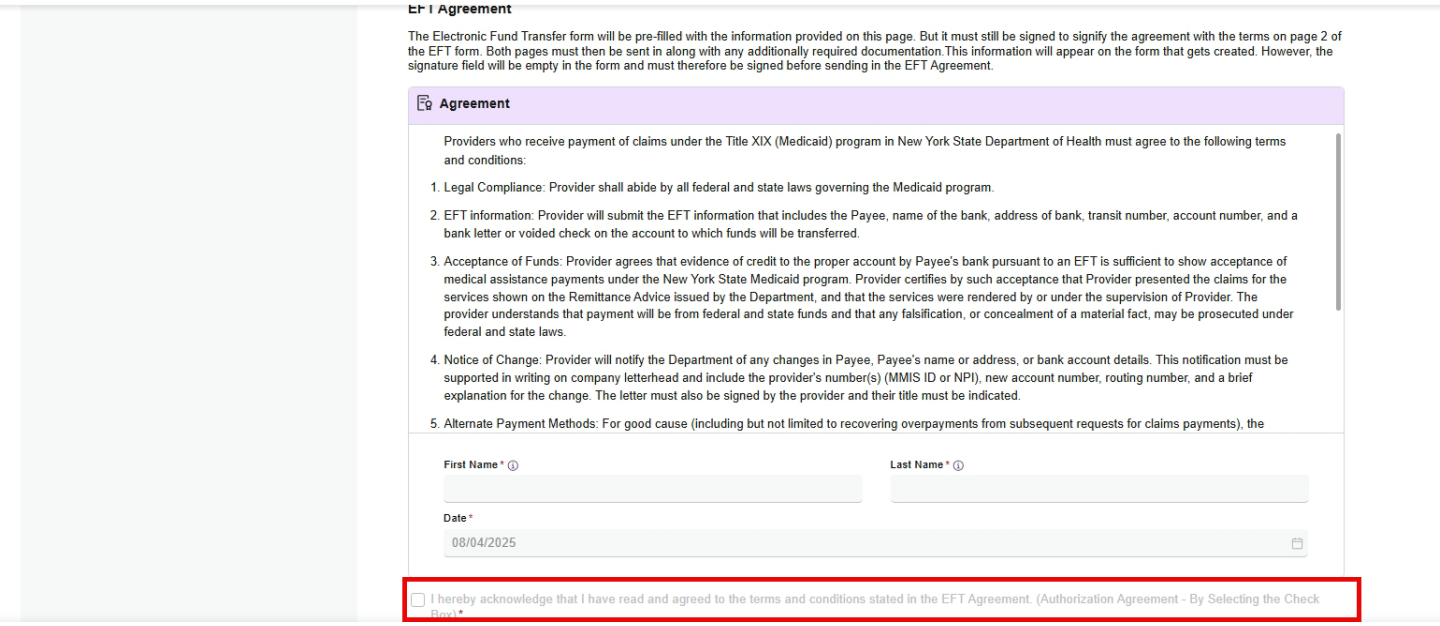
Information like the Social Security Number/EIN/FEIN and Provider Name will be imported based on what was entered

Provider Services Portal-Milestone 2

to generate the application. Payment method will be automatically selected as Electronic Funds Transfer (Direct Deposit). Fields marked with a red asterisk are required fields.



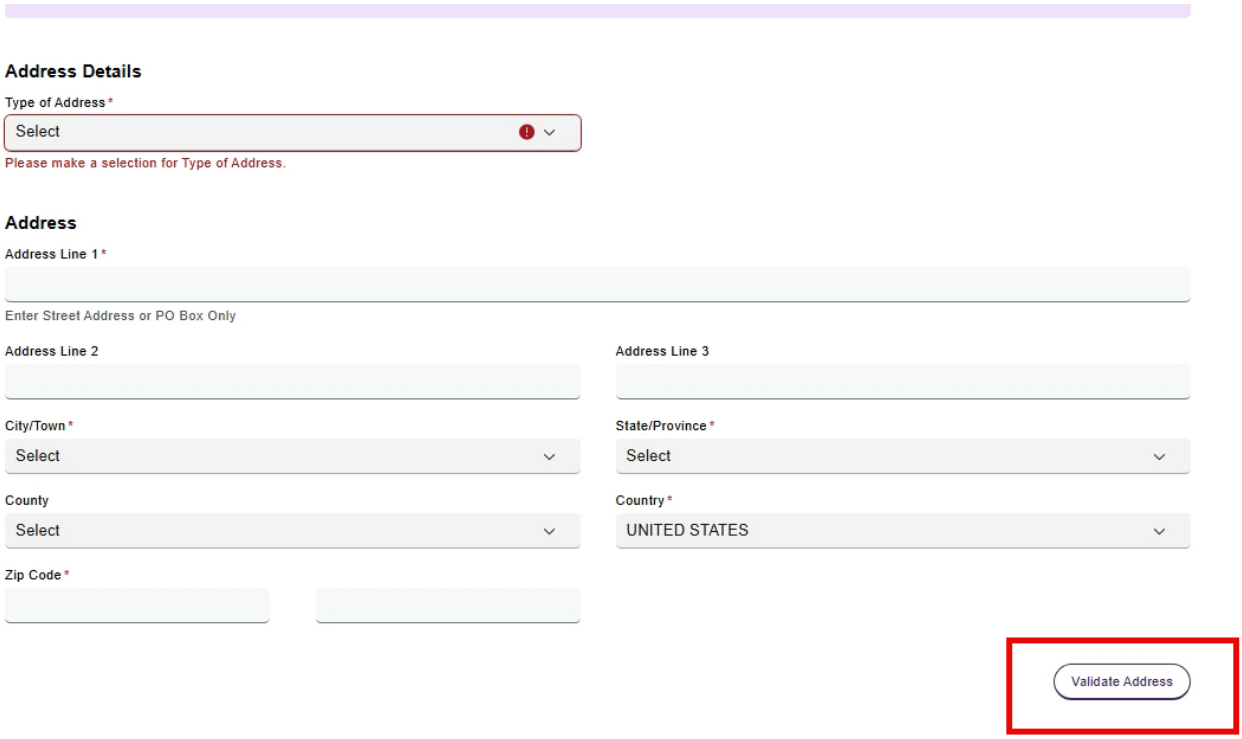
The EFT agreement must be read in full by scrolling down, and then signed. The signature boxes will remain greyed out until the entire EFT agreement has been read. **Click** the box that acknowledges that the EFT agreement has been read and agreed to.



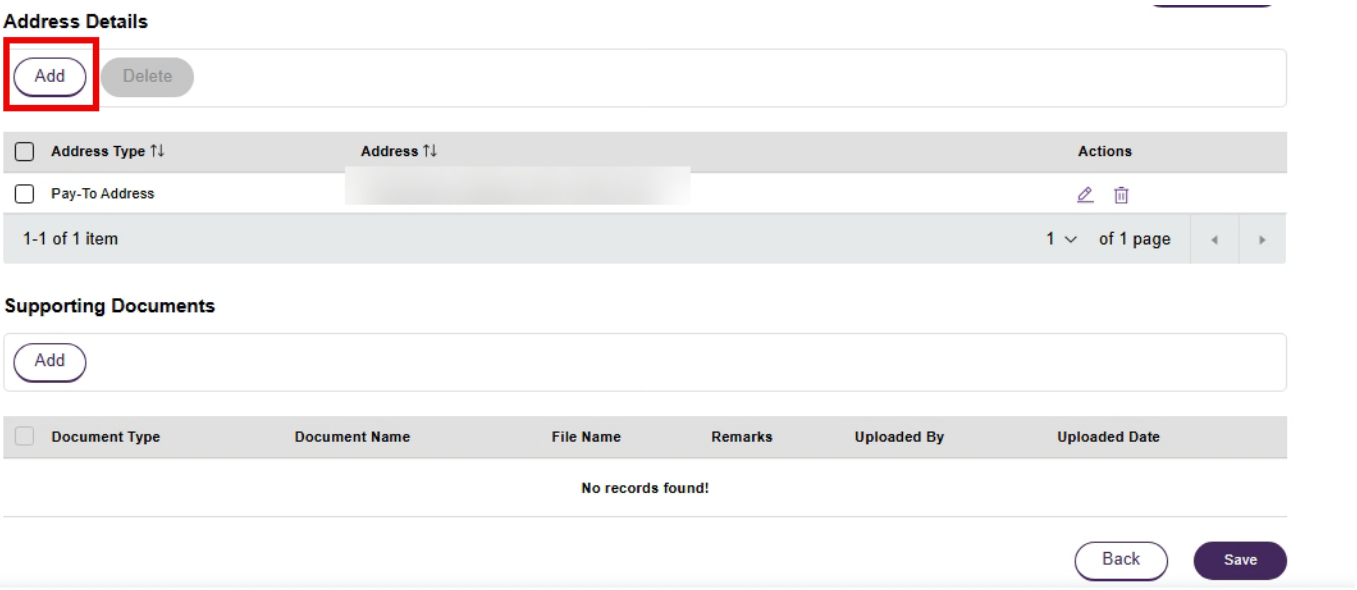
Click on Save Details in the middle right of the page after checking the box to agree
Click on Add under Address Details to enter the Pay-To address. This is the address where paper checks (if necessary) and remittances will be sent to until Electronic or PDF Remits are set up. Fields marked with a red asterisk are required.

Provider Services Portal-Milestone 2

Click on Validate Address. **Click** on Save after you validate the address.



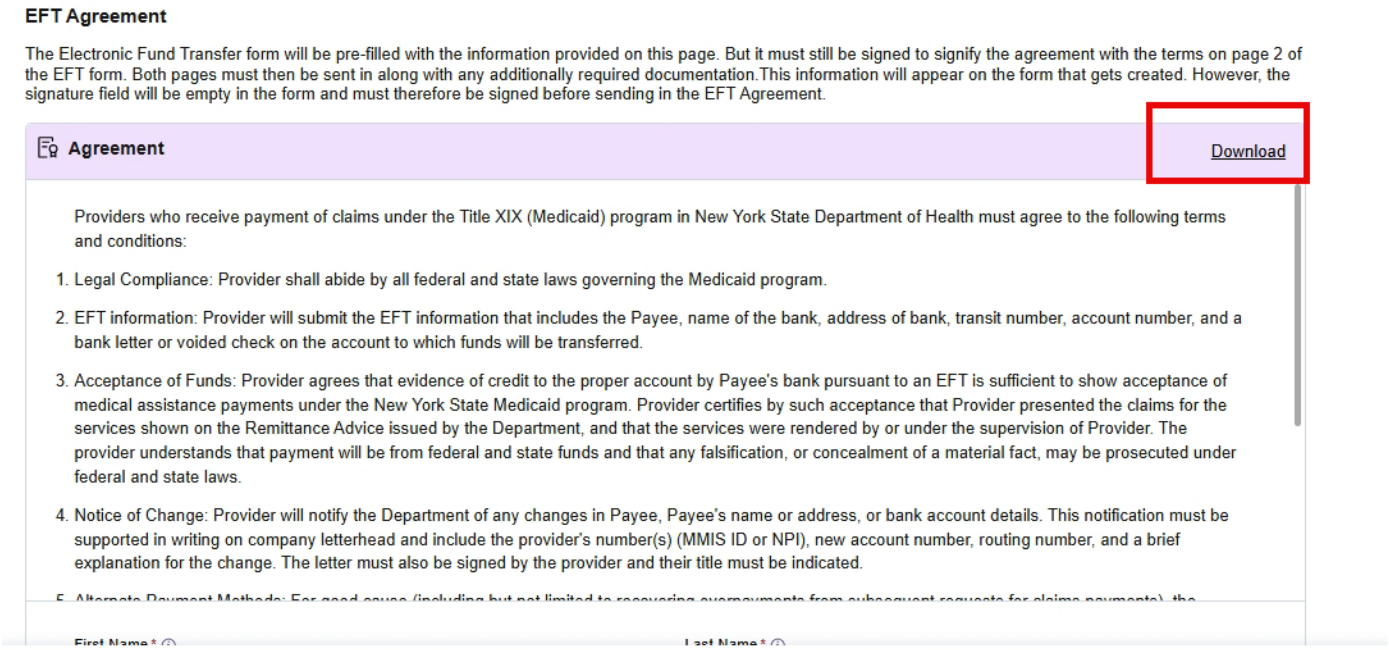
Click on Add under Address Details again to enter the Financial Institute address details. **Click** on Validate Address and then Save under the Validate Address button.



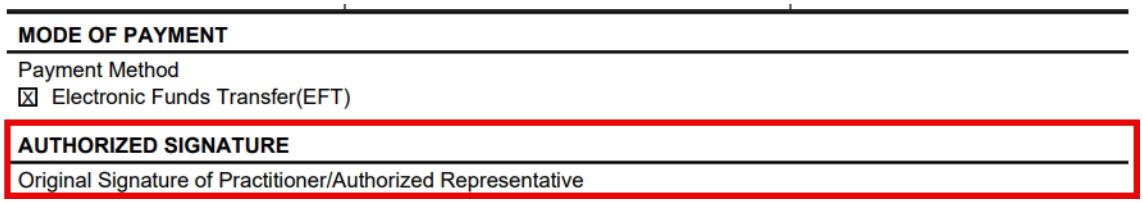
Once the Pay-to Address and Financial Institution Address have been entered and validated, scroll up to the EFT

Provider Services Portal-Milestone 2

agreement to download the EFT agreement. **Note**: This download button will not be available until both addresses have been entered. **Click** on Download.

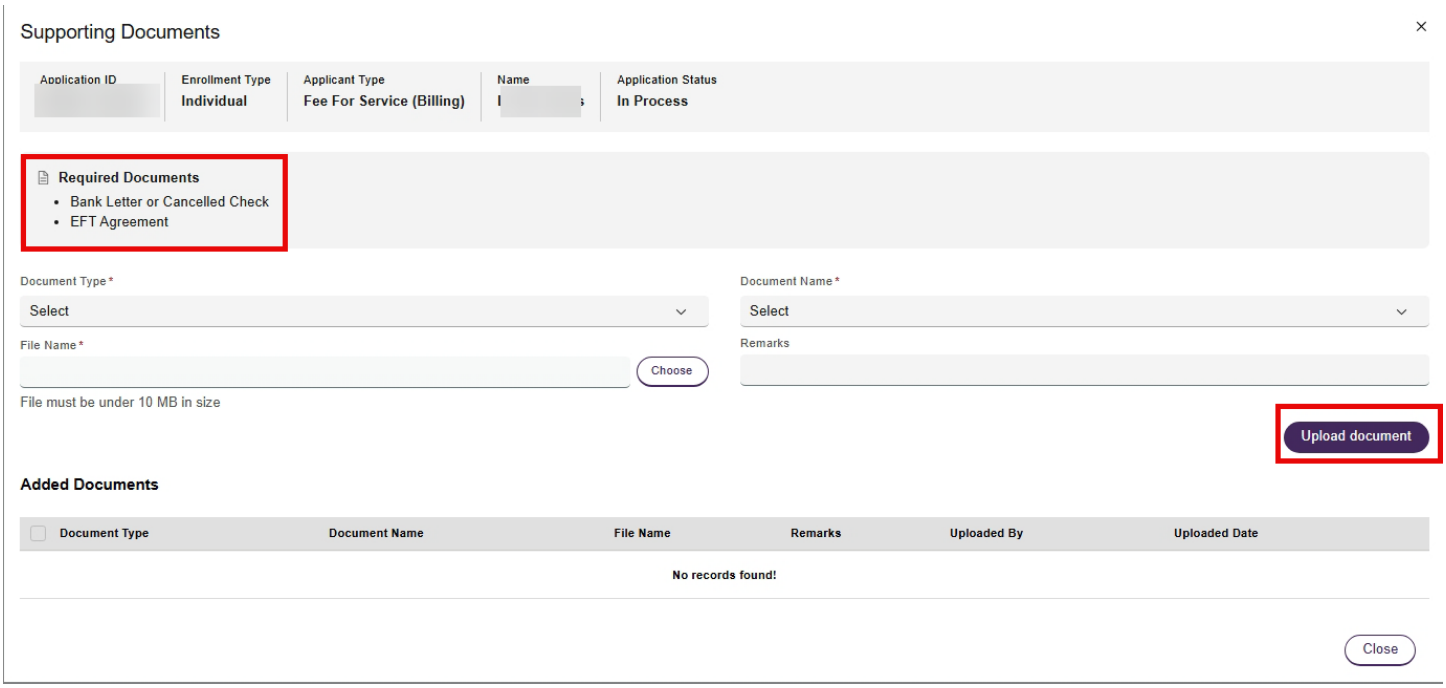


Once the EFT Agreement has been downloaded, it must be physically signed and saved to then upload under the Supporting Documents section of this step.



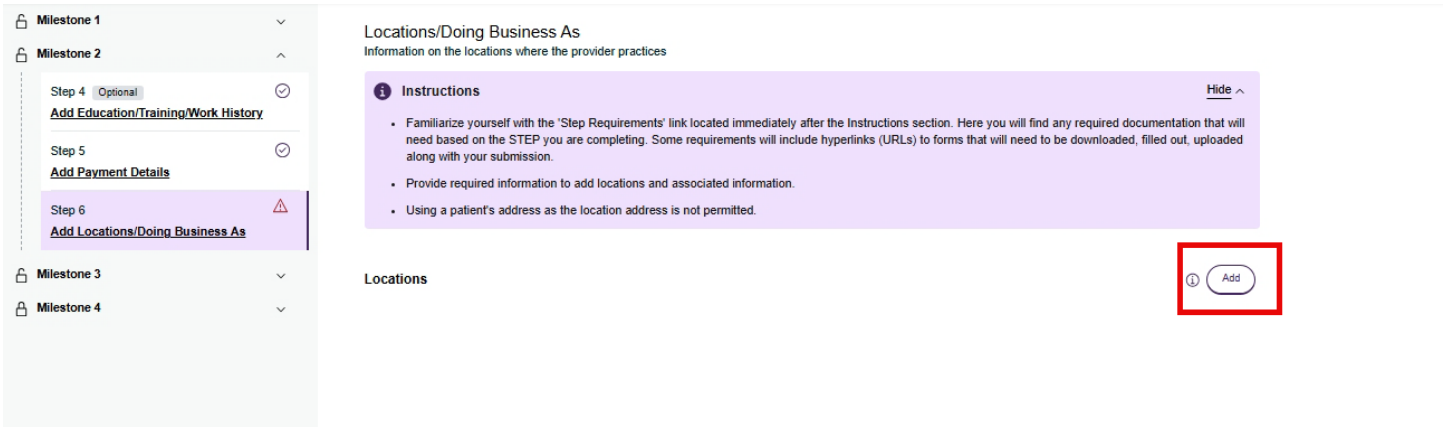
Click on Add under Supporting Documents. A new screen will pop up that allows you to upload supporting documents for this step. File formats allowed: .gif, .jpg, .jpeg, .html, .htm, .pdf, .xls, .tif, .doc, .docx, .xlsx, .txt. **Click** on Upload document. **Click** on Close when you have uploaded the documents

Provider Services Portal-Milestone 2



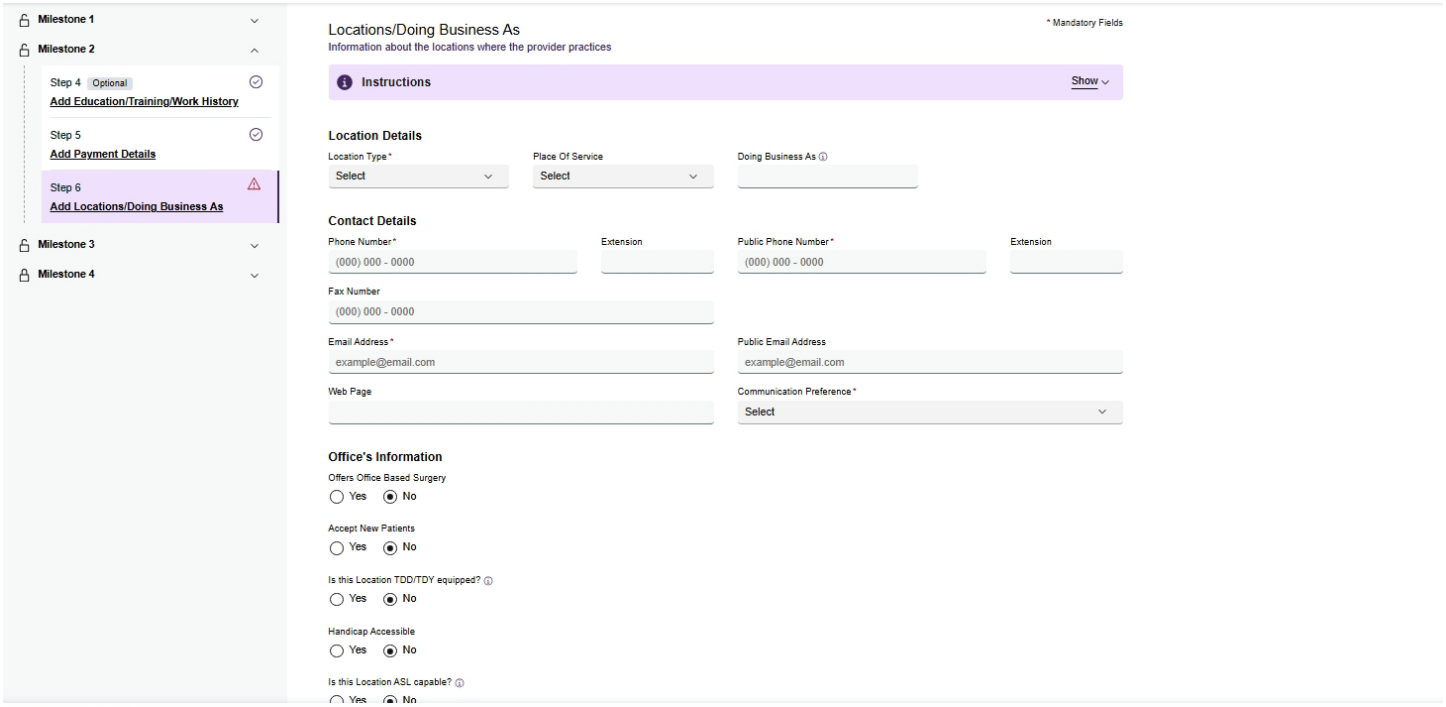
Click on Save at the bottom right right once all details of this page have been completed. **Click** on Next Step at the bottom right of the page.

Step 6 of Milestone 2 is for adding locations/doing business as. **Click** the show button arrow on the purple instructions banner to display instructions relating to this step. **Click** Add at the bottom right.



The next screen that will display is the Location Details page. Fields marked with red asterisks are required.

Provider Services Portal-Milestone 2



Pediatric Services
Yes No

Age Restrictions
Yes No

In Person/Telehealth *
Select

Disability Accommodations
Select

Maximum Clients

Offers OB-Gyn Services
Select

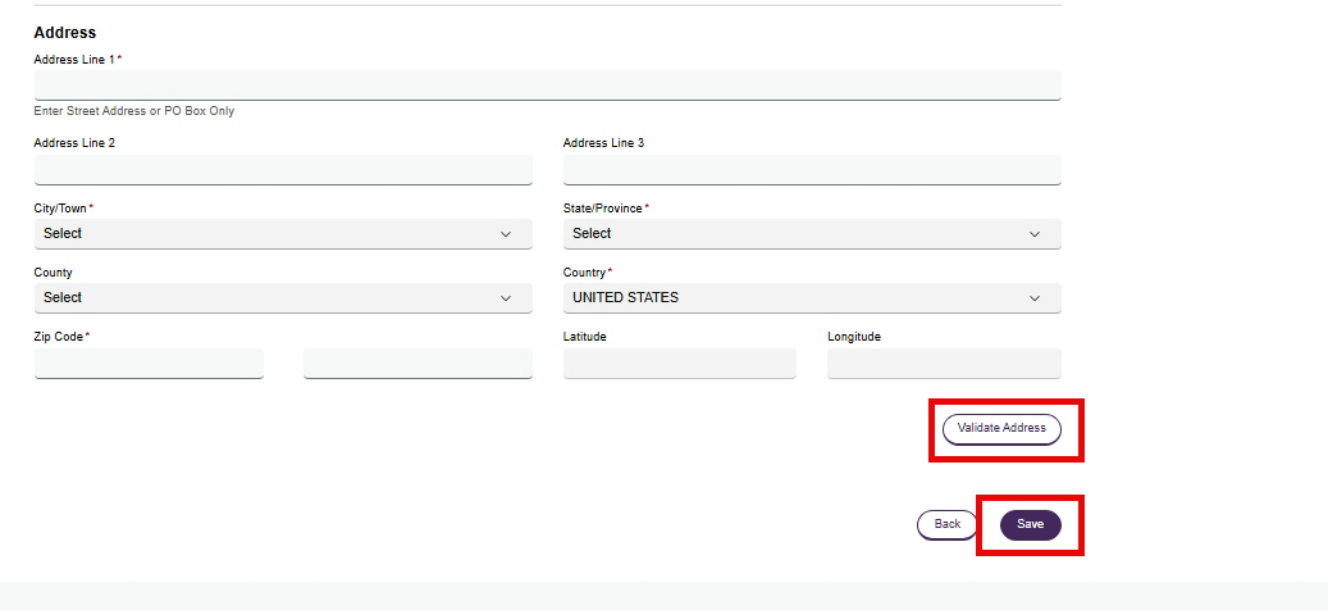
Languages Spoken

Selected Languages *
Select

Office Hours

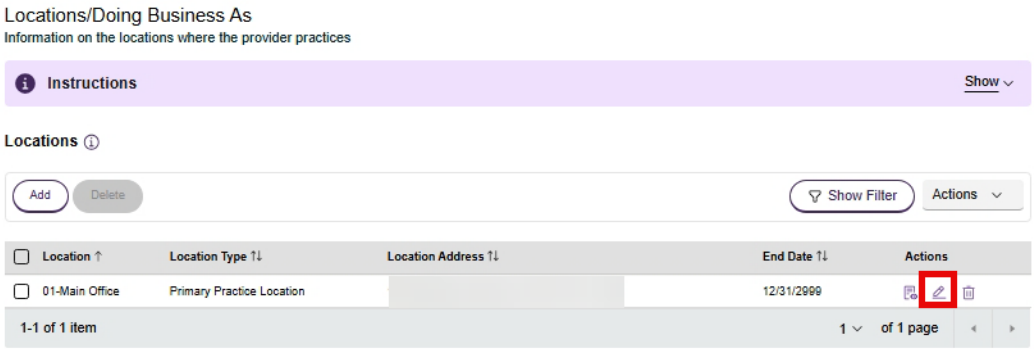
- [ ] 24/7
- [ ] Sunday
- [ ] Monday
- [ ] Tuesday
- [ ] Wednesday
- [ ] Thursday
- [ ] Friday
- [ ] Saturday

Provider Services Portal-Milestone 2

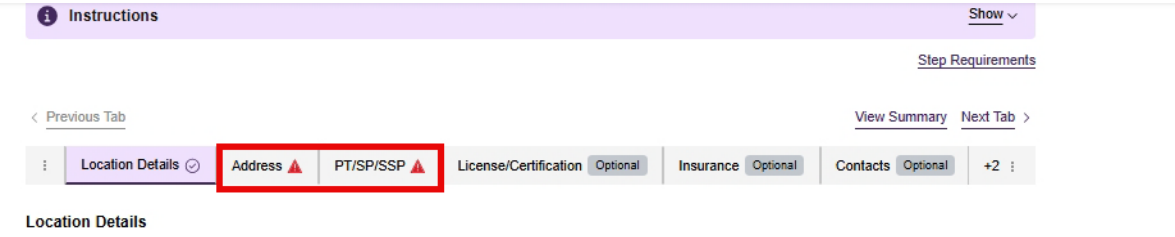


Once you enter the details of the address, **Click** on Validate Address in the bottom right-hand corner. **Click** on Save directly below Validate Address when all information is correct.

This will bring you back to the main page of the step. You will then need to **click** on the edit button of the address to add additional information before the step is complete.

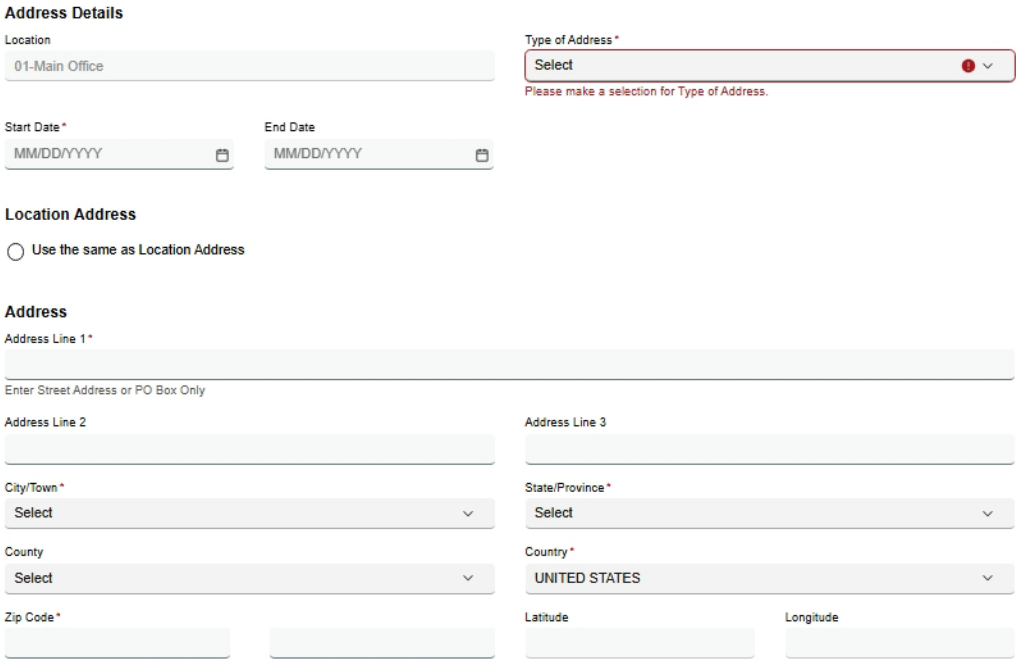


This will bring you into the address details you just entered. Now there will be a ribbon at the top which will have two sections that require additional information. These will be marked with a red warning triangle.



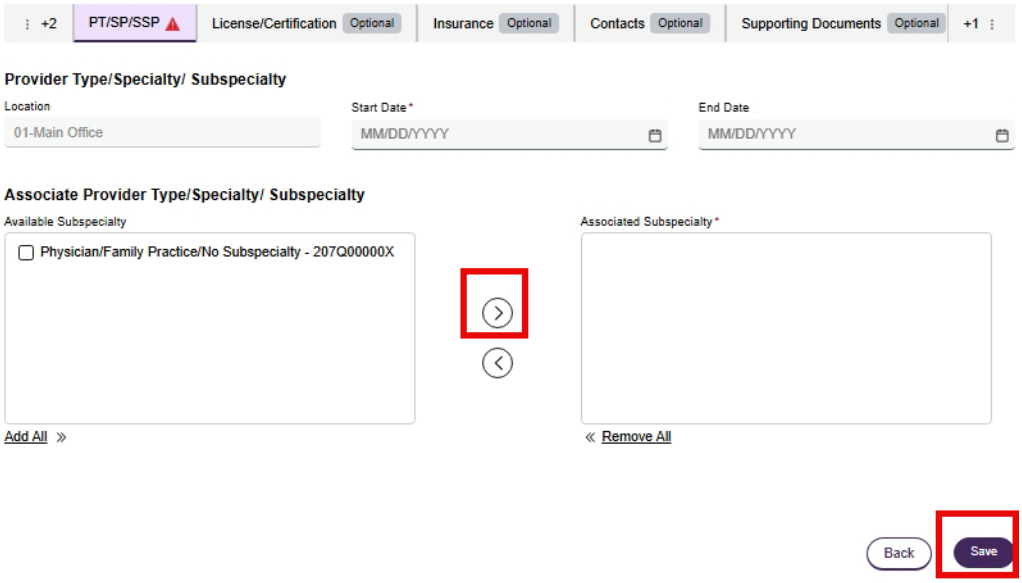
Provider Services Portal-Milestone 2

Click on the Address Tab first. This will bring you to a screen where you will select the Correspondence Address, which is where any paper communications will be sent. Fields marked with red asterisks are required.



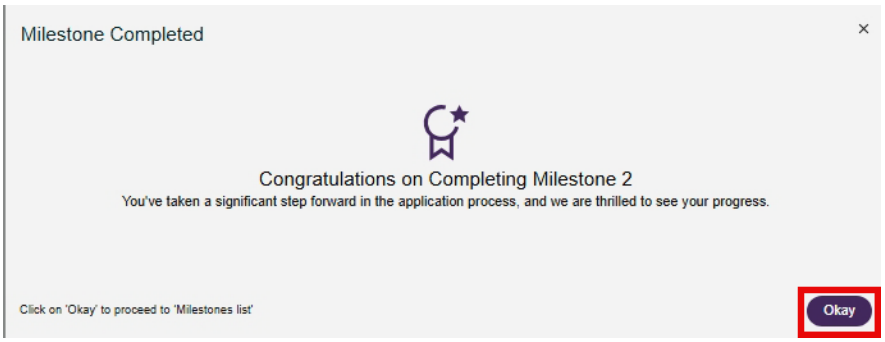
There is the option to have the Correspondence Address the same as, or different from the Location Address. Once you enter the address details, **click** Validate Address then **click** Save underneath that.

Click PT/SP/SSP tab next. Fields marked with red asterisks are required. **Select** the specialty(s) from the box on the left and **click** the arrow pointing to the right to move the specialty over. **Click** Save when you have moved all subspecialties over.



Provider Services Portal-Milestone 2

Once you are completely satisfied with the information in Milestone 2, **click** on next step at the bottom right. A pop-up screen will display the following information



You are now complete with Milestone 2. **Click** Okay to acknowledge and move on to the remainder of the application.