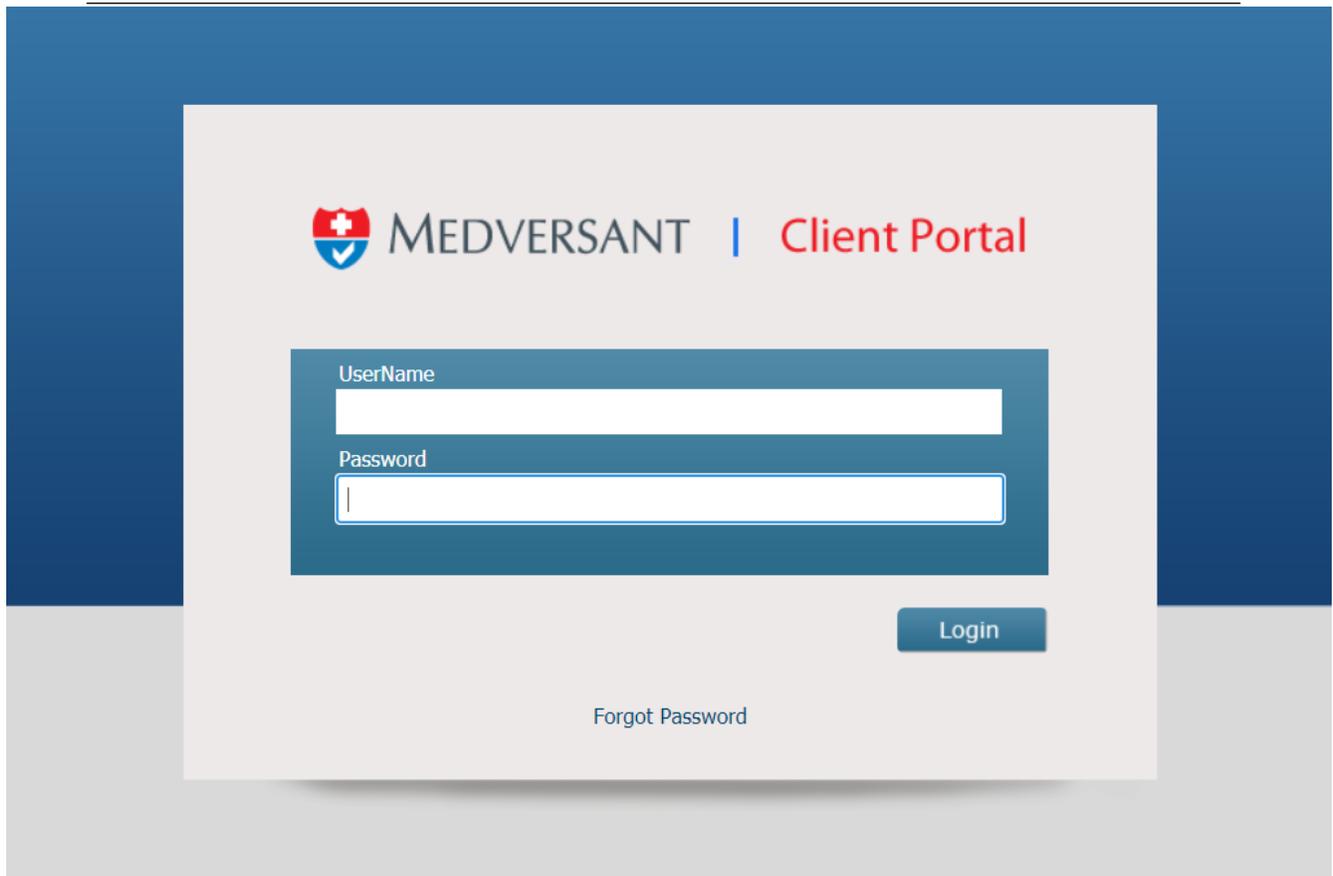# DWIHN Client Portal User Guide

For Provider Organization Users

PREPARED BY

Information Technology Department

Medversant Technologies

Version 1.0

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1. Overview

The Client Portal is designed to allow Provider Organizations to easily access data and documents provided by practitioners as part of the Detroit Wayne Integrated Health Network Credentialing program. This User Guide is designed to assist Client Portal account holders to utilize the application to perform their associated tasks.

2. System Requirements

Client Portal is designed to work with current versions of industry standard browsers that are currently supported by their respective developers. These browsers include Google Chrome, Internet Explorer and Firefox.

3. New Users - Request a Client Portal Account

If your organization is not currently utilizing the system you will need to contact a DWIHN to create an account for your organization, who will in turn share your account creation information (name, organization and email address) with Medversant in order to ensure both your account and organization are properly configured within the system.

4. Returning Users – Log in to your Client Portal Account

The sections below detail how users log in to their Client Portal Account.

4.1 Enter Username and Password

1. Visit https://client.providersource.com/portal/Login.aspx

2. Enter your **User Name** and **Password** and click the **Login** button, as shown in Figure 1.
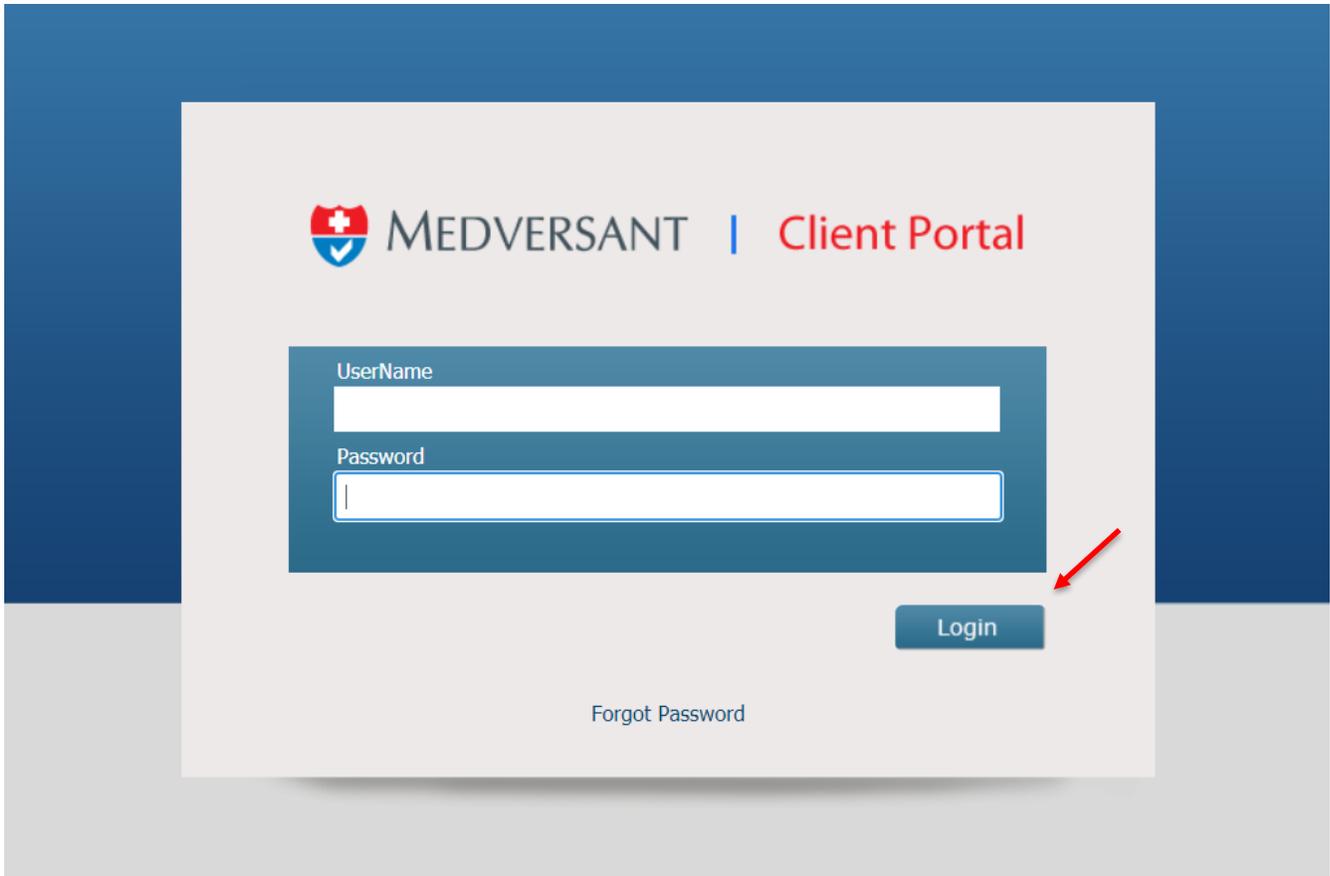
Figure 1

Important: Your **User Name** is the email address used to create your account and must be entered as a complete email address to properly log in to the Client Portal (Example: JohnDoe@gmail.com).
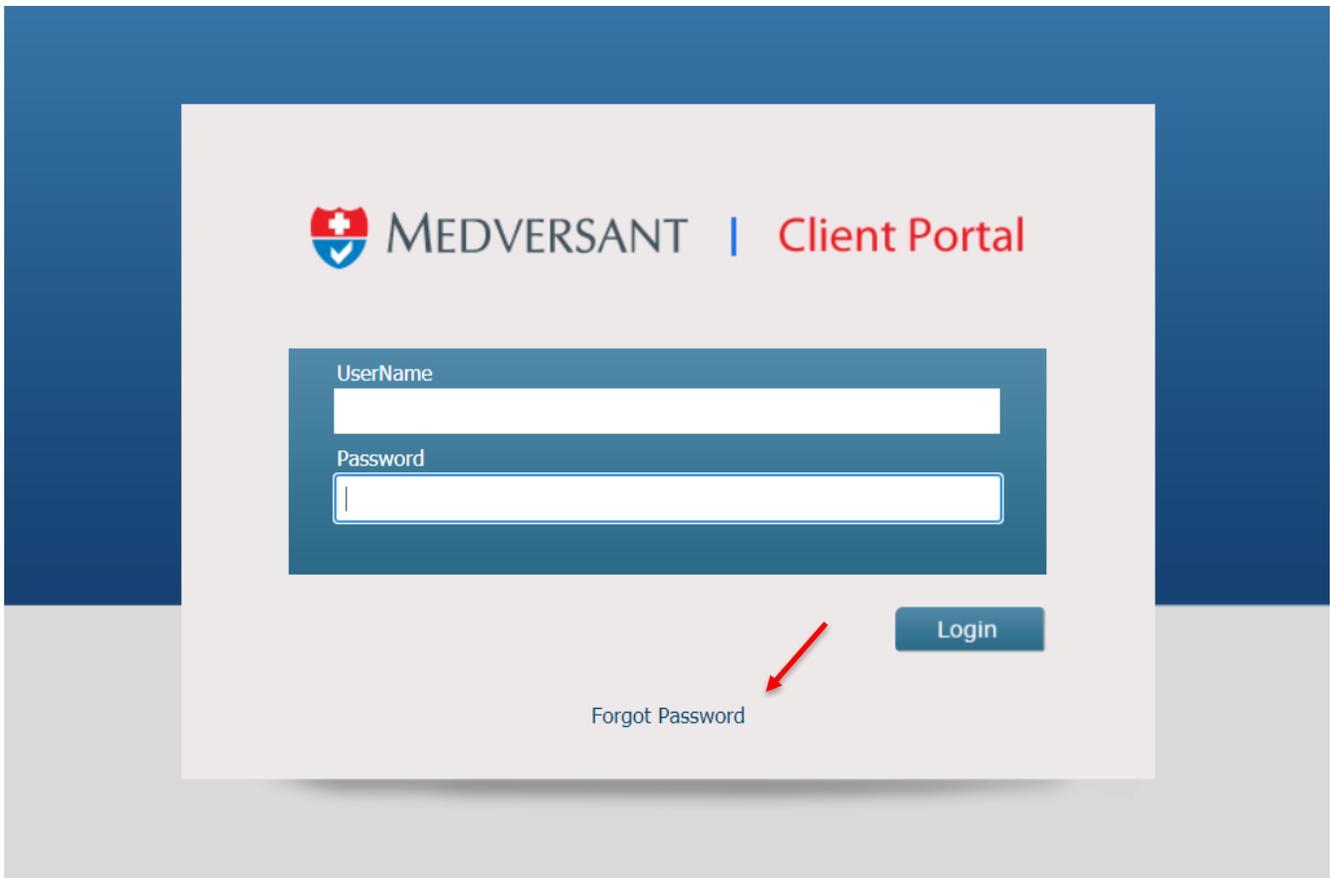
Important: Each **User Name** must be unique and may only be used for one Client Portal account.

4.2 Request Forgotten or Lost Password

If you have forgotten or lost your Client Portal password, follow these steps to regain access to the portal.

1. Visit https://client.providersource.com/portal/Login.aspx
2. Click the **Forgot Password** link, as shown in Figure 2.

Figure 2

3. Enter the email address associated with your account in the **UserName** field and click the **Retrieve** button, as shown in Figure 3.
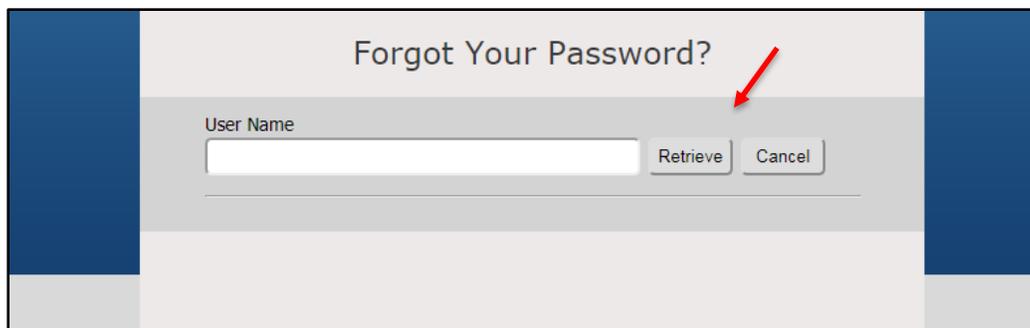
Figure 3

4. Select the appropriate security question, fill in the answer, as shown in Figure 4.

5. Enter and confirm your new password, click the **Submit** button, as shown in Figure 4.

Figure 4

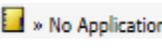6. A message will display to indicate the password change is successful, as shown in Figure 5.
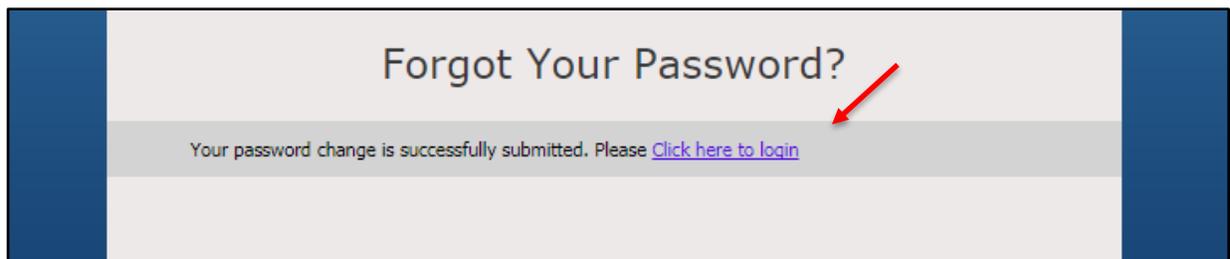
Figure 5

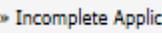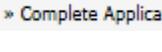7. Click the link **Click here to login**, as shown in Figure 5 to return to the **Login Screen** where you will enter your user name (email address) and your updated password as described in Section 4.1 previously.

5. Data Access

Client Portal's Data Access section is designed to provide users with easy access to practitioners information. Practitioners will have the opportunity within ProviderSource, the practitioner facing application, to select the Provider Organization to whom they want want to prov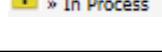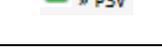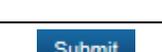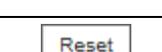ide access to their credentialing data. Client Portal users with Provider Organizatio level access will have the ability to view attested and credentialed data, and retrieve credentialing related documents that the practitioner has submitted or that were generated as part of the credentialing process.

5.1   Data Access: Icon Legend
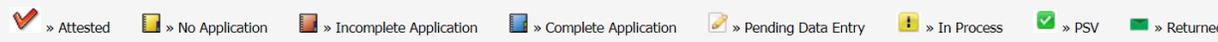
» Attested	Legend icon indicating the Practitioner's application has been attested
» No Application	Legend icon indicating the Practitioners has no application entered
» Incomplete Application	Legend icon indicating the Practitioners application in incomplete
» Complete Application	Legend icon indicating the Practitioners application has been completed
» Pending Data Entry	Legend icon indicating the Practitioners application has a pending data entry
» In Process	Legend icon indicating the Practitioners application is in process of attestation
» PSV	Legend icon indicating the Practitioners application in PSV status
» Returned	Legend icon indicating the Practitioners application has been returned
Download Data	Link for downloading the Practitioners application data
Download Documents	Link for downloading the Practitioners attached documents
Provider Name	Header labels for sorting the Practitioners list in ascending or descending order
Submit	Button for submitting the selected search criteria
Reset	Button for resetting the search criteria
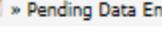
5.2   Data Access: Search by Query

1. From the Data Access tab, click the **Search by Query** link at the top of the screen, as shown in Figure 6.
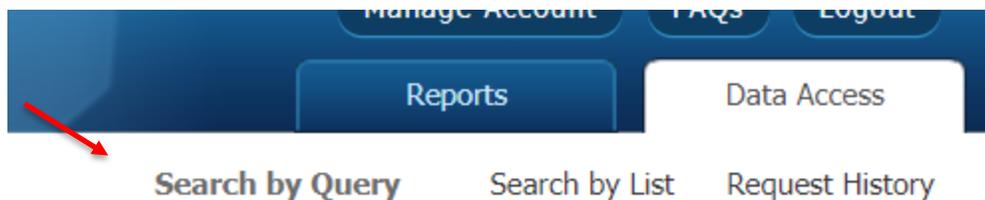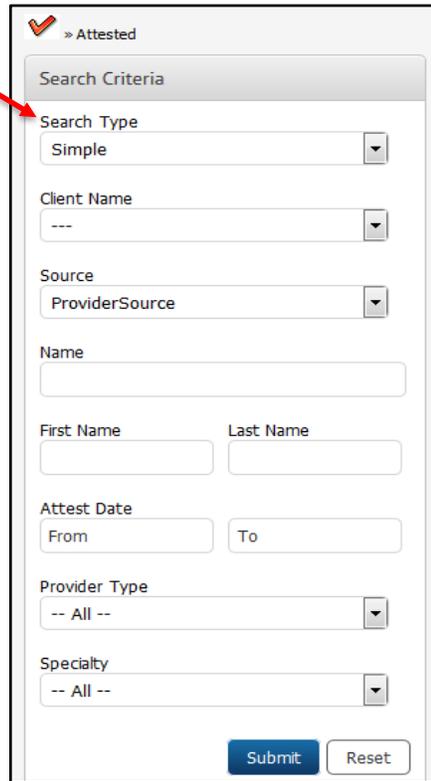

Figure 6

2. A window will appear on the left-hand side of your screen. Access the **Search Type** drop down box as shown in Figure 7, to choose the **Search by Query** method you wish to use. Clicking "Submit" will simply pull back all results. Simple Search will provide eight fields to filter your search, using Advanced Search will add additional identifiers for use in narrowing down the search.

- **Simple Search**: The user searches all client-specific practitioner data to narrow a search down to a specific record or records as shown in Figure 7.
  - Source – ProviderSource will provide Attested Data, whereas Credentialing will only show records that where Credentialing has begun.
  - [Practitioner] Name – only used when searching for Businesses and/or Facilities.
  - [Practitioner] First Name
  - [Practitioner] Last Name
  - Practitioner [Practice] Type
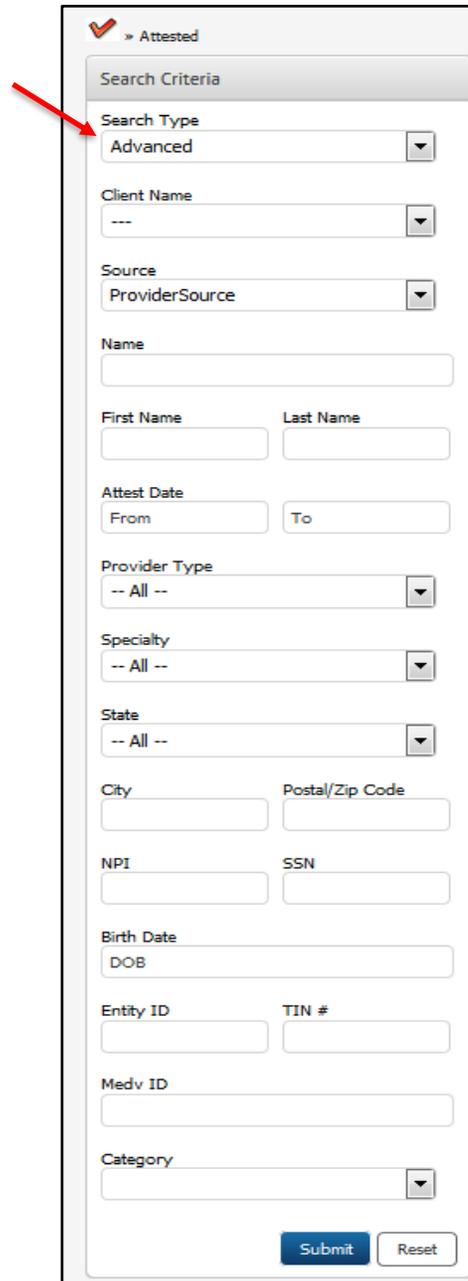 - Attest Date (from / to)
  - Provider Type

o Specialty

Figure 7

- **Advanced Search:** The user searches all client-specific practitioner data using expanded information fields to perform a more detailed search, as shown in Figure 8. Most of these additional fields are related to unique identifiers. The three most important identifiers that are typically used are:
    - NPI
    - SSN
   - Date of Birth

Figure 8

3. After entering search criteria into the applicable information fields and click the blue **Submit** button to initiate your search. You must click the **Submit** button rather than simply hitting Enter on your keyboard. The reset button will clear all search criteria.
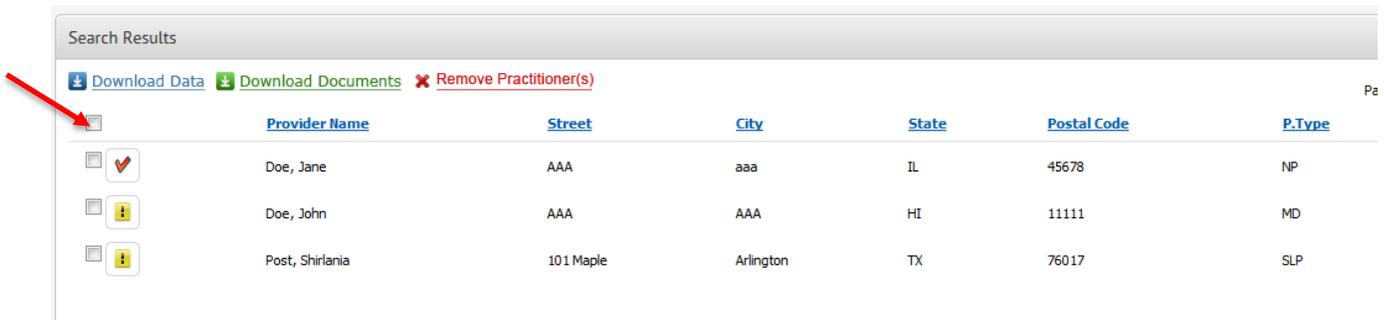
Figure 7

Your results display as shown in Figure 9. The results may be re-ordered in ascending or descending order by clicking on a single blue column header to toggle the sort order.

4. In the event of a broad search, a large number of practitioners may be returned. On the top right of the screen, the number of pages created are shown and the number of practitioners found from your search are displayed. By selecting the **Page Size** dropdown box as shown in Figure 10, a user can change the number of results per page from 15 to 2000. Users can also use the yellow navigation arrows to move between pages.
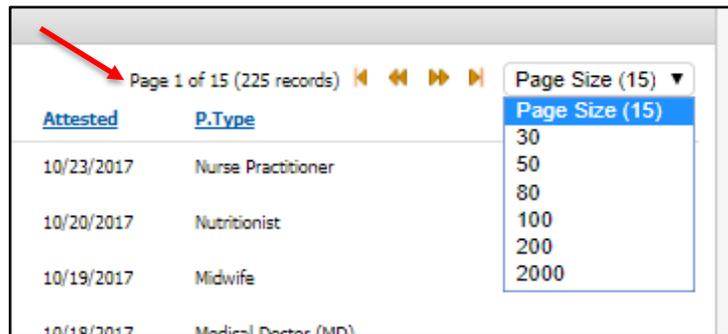
Figure 8

4. To download data or documents, click the checkbox next to the appropriate practitioner records and click the **Download Data** or **Download Documents** link as shown in Figure 11.

Figure 9

To perform the download data option:

- Download data files by clicking on the blue **Download Data** link and then select the preferred data type as shown in Figure 12
- Click on the data file icon below the header CSV to retrieve a comma separated value file for the selected records, and the selected data file will be downloaded.
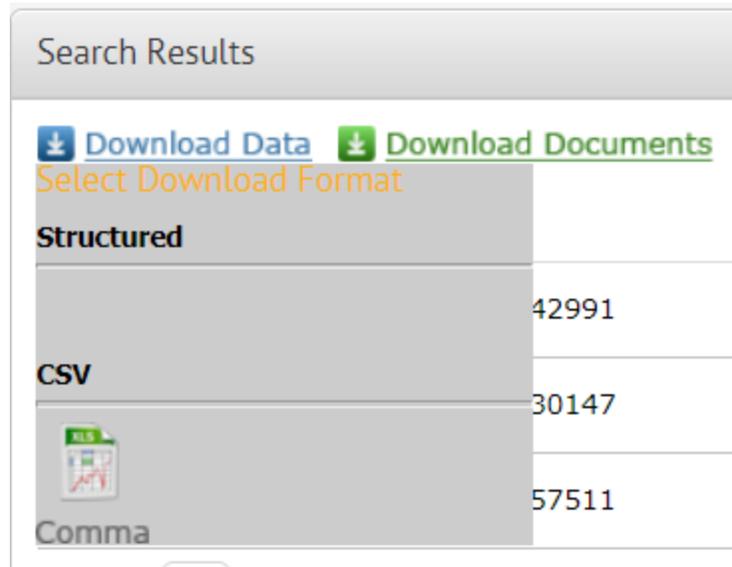

Figure 10

To perform the download documents option:

- Click on the green **Download Documents** link.
- The selected files will be downloaded into a zipped file.
- Check the bottom of your browser for the file as shown in Figure 13. Note that your particular browser may download files in a different way.
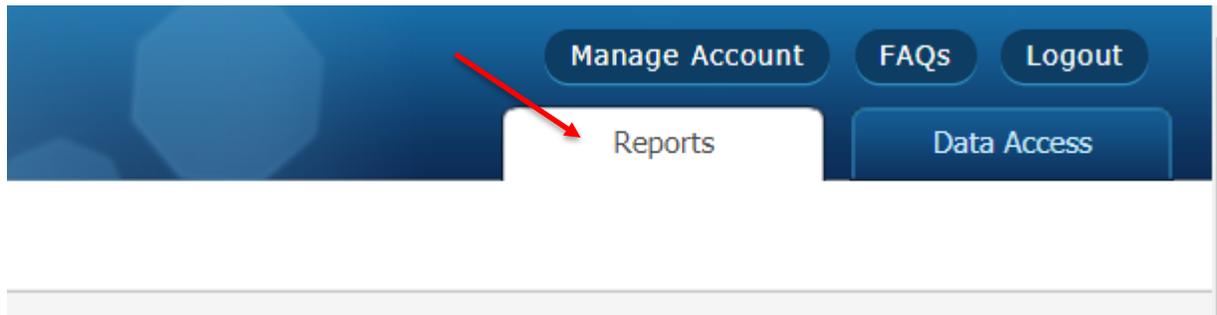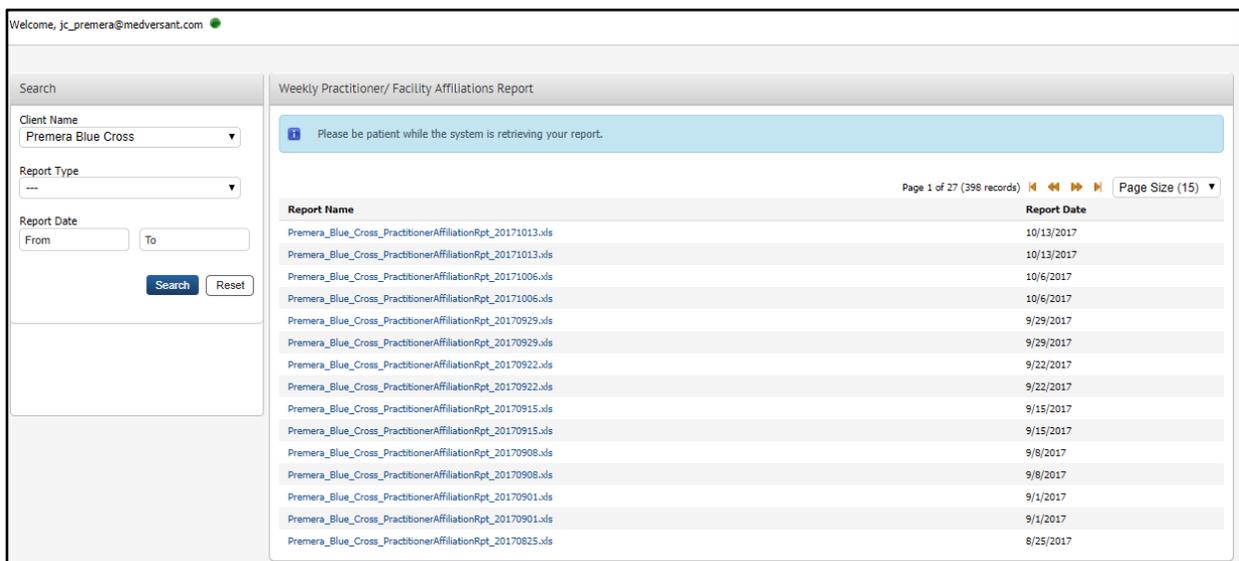
.

Figure 11

6. Reports

*This section of the **Client Portal User Guide** applies to Report access.*

Select the **Reports** tab at the top right of the Client Portal page as shown in Figure 15.

Figure 15

This will take you to the **Reports** section of Client Portal.

Figure 16

On the left-hand side is the Report **Search** Area. Below are the steps to follow to generate a report:

- **Client Name** – Your Organization – Will be pre-populated with the name of your Provider Organization and you will only be able to access the data related to your specific organization.
- **Report Type** – Defaults to the Affiliation Report.
- **Report Date** – Select the date range here for filtered content
- Click on the blue **Search** button to generate the reports
- Results are displayed on the right

- Click on the report link that you wish to download

7. Practitioner Affilation Report

MedvId	ENC100004	Medversant Internal Record ID
NPI	100220xxxx	NPI captured in Medversant system
First_Name		
Middle_Name		
Last_Name		
Practitioner_Type	Abreviation of Practitioner Type	Practitioner Type selected in Provider Source Application or Roster
CollectionItems	List of items deamed missing, expired, or insufficient	Items determined to be missing by Medversant App Intake team
Status	BLANK/Non Responder	Records which have been contacted in exces of 3 times
Non-Responder_Email_Date	MM/DD/YYYY	Date Non Responder E-Mail was sent
Reviewaction	Approved / Denied	Decision of Medical Director
DecisionDate	MM/DD/YYYY	

8. If You Need Further Assistance

If you have any additional questions, please click on the Contact Us link in the footer of any page to submit requests for further assistance.
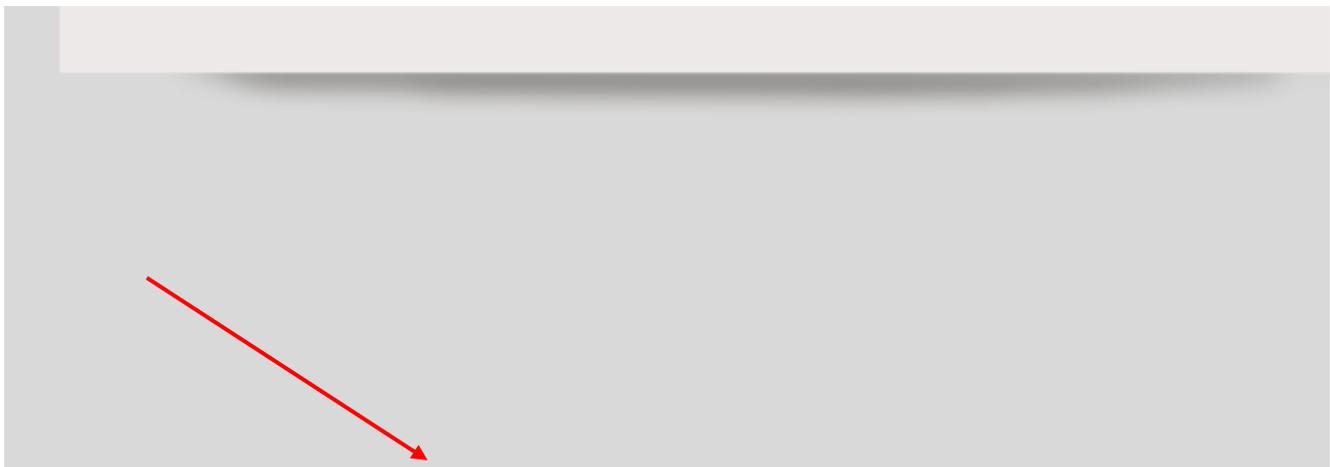
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