

# HOW TO MANAGE VARIOUS PROVIDERS AS A CREDENTIALER OR OFFICE MANAGER

It is critical that you first identify whether you are entering ePREP on behalf of a group or renderer:

If you have privileges to act on behalf of a group, proceed to **STEP 1** under **Getting Started for a Group**.

If you do not have privileges to act on behalf of a group, proceed to **STEP 1** under **Getting Started for a Renderer**.

If you have privileges and permission to act on behalf of both a group and renderers, start by signing up your group. After you've set up the group, then start over and proceed with renderers.

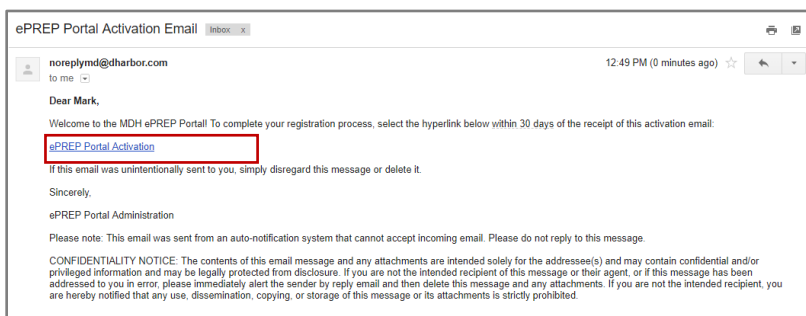
## GETTING STARTED FOR A GROUP

**STEP 1:** Create an ePREP User Profile using your contact information and your professional email address. The email address will be your Username to login to ePREP. Your email address can only be used once and cannot be used to create another User Profile.

The screenshot shows the ePREP Portal Sign Up page. The page has a dark blue header with the ePREP logo and navigation links: Bullitins, Contact Us, Sign Up, and Login. A welcome message on the left reads: "Welcome! Thank you for your interest in ePREP Portal. Setting up your User Profile will take just a few minutes." The main content area is a white sign-up form with the following fields: First name, Last name, Phone number, Email address, Re-enter email address, Password, and Re-enter password. A red box highlights the Email address and Re-enter email address fields. At the bottom of the form, there is a checkbox for "I'm not a robot" and a "Continue" button.

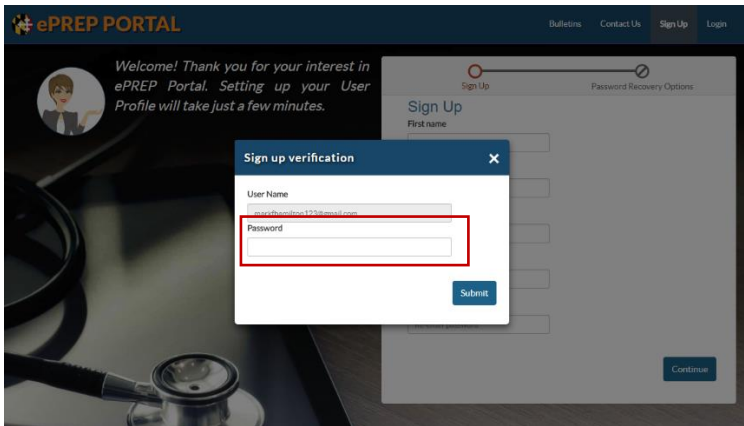
**STEP 2:** ePREP will send an email to the address used to sign up to complete the User Profile activation process.

**STEP 3:** Select the “ePREP Portal Activation” hyperlink



**STEP 4:** ePREP will display the Signup Verification popup

**STEP 5:** Enter your signup password



**STEP 6:** Your User Profile is successfully created when ePREP displays the Login Page

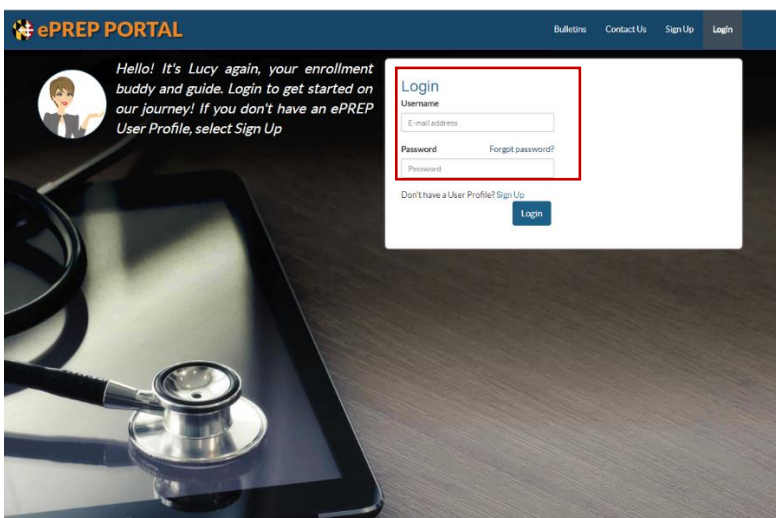
**STEP 7:** Now continue below to the instructions for **Creating a Business Profile For A Group**

## CREATING A BUSINESS PROFILE FOR A GROUP

Please use steps 1-4 if you are a credentialer or office manager and have privileges to act on behalf of a group. In preparation for these steps choose one of your group's NPIs to set up the initial Business Profile.

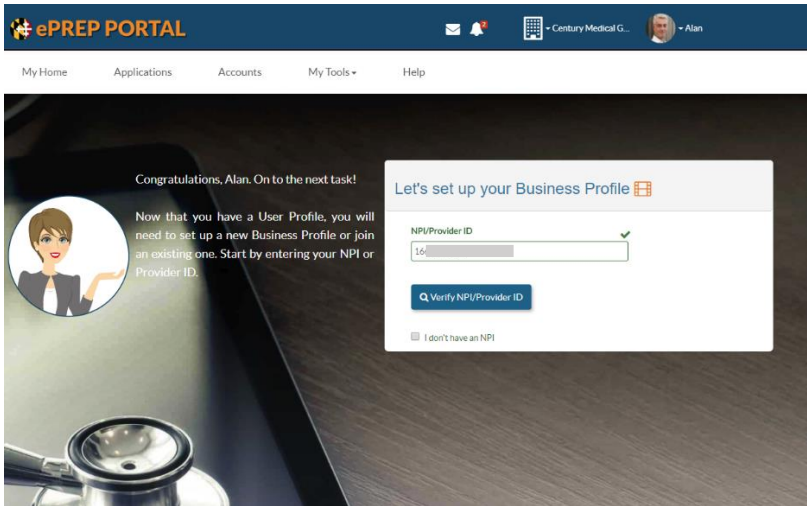
**STEP 1:** ePREP will display the login page

**STEP 2:** Enter your username (User Profile email) and your password



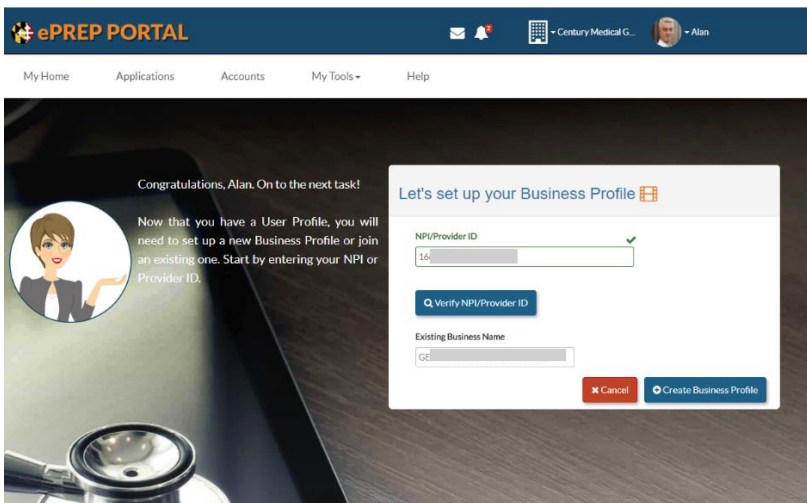
**STEP 4:** ePREP will present the Create Business Profile page

**STEP 5:** Enter the NPI for the provider you are creating this Business Profile for and select *Verify NPI/Provider ID*

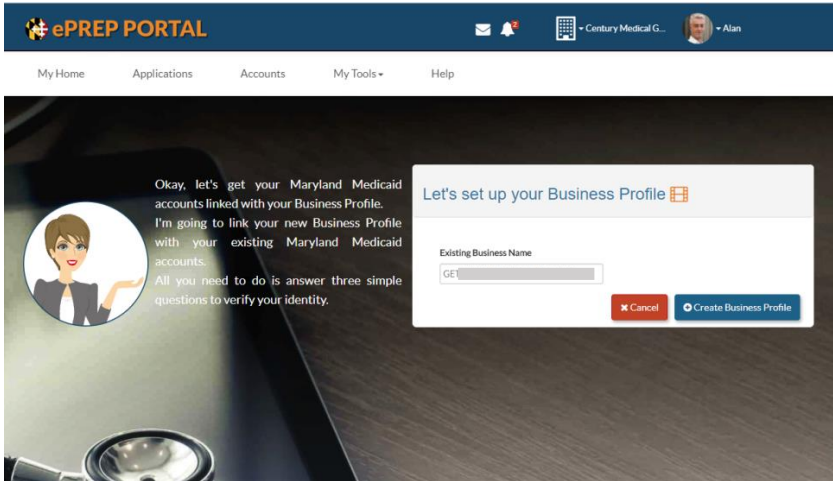


**STEP 6:** If ePREP finds one or more accounts based on the NPI the Business Profile Name field is auto-fill with the provider's business name on file

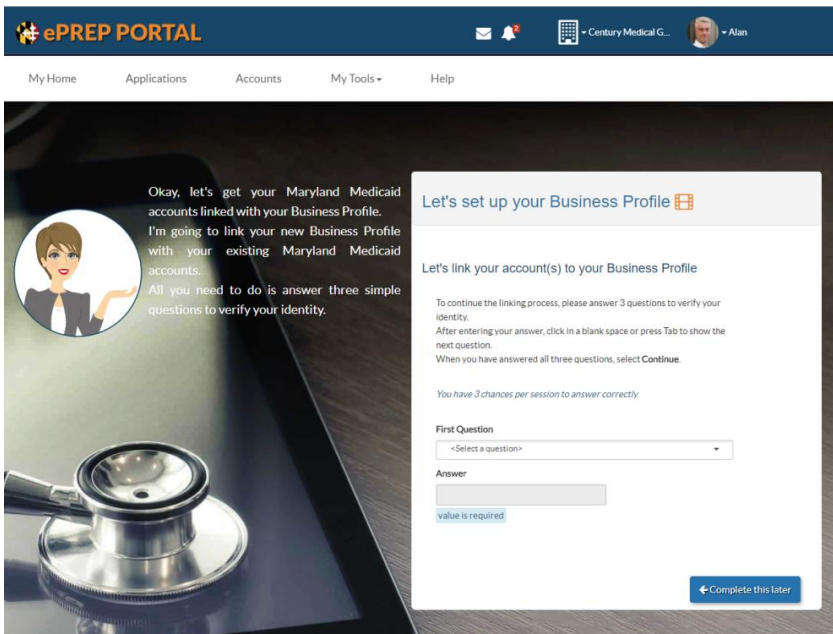
**STEP 7:** If the business name is correct, select the *Create Business Profile* button otherwise, reenter the NPI or select the *Cancel* button



**STEP 9:** If you want to change the Business Profile name, please do so at this time otherwise, select the *Create Business Profile* button



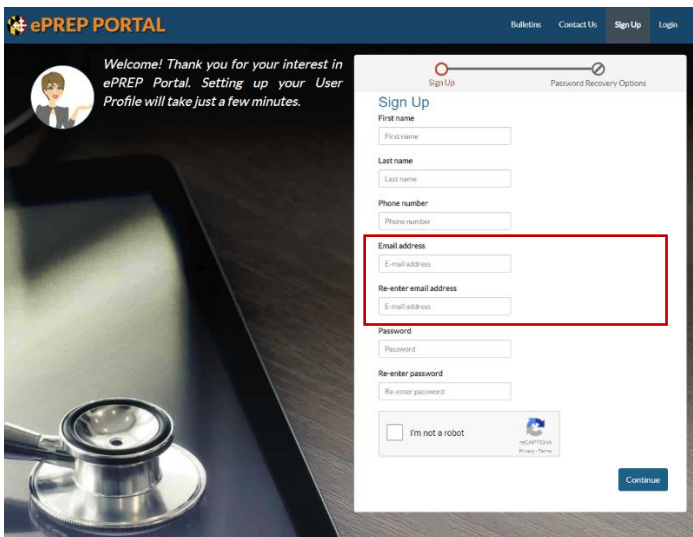
**STEP 10:** Complete the validation questions as outlined. You will only be allowed three mistakes per session so carefully answer each question correctly. If for whatever reason you make three mistakes you can still create the Business Profile, then go to the *Accounts* tab once the Business Profile is activated



## GETTING STARTED FOR A RENDERER

You should only proceed if the rendering provider has given you the authority to create their User Profile and permission to set up their Business Profile. With such permission, you must share the login credentials and responses to security questions with the rendering provider, so they have access to their User Profile, Business Profile, and Account.

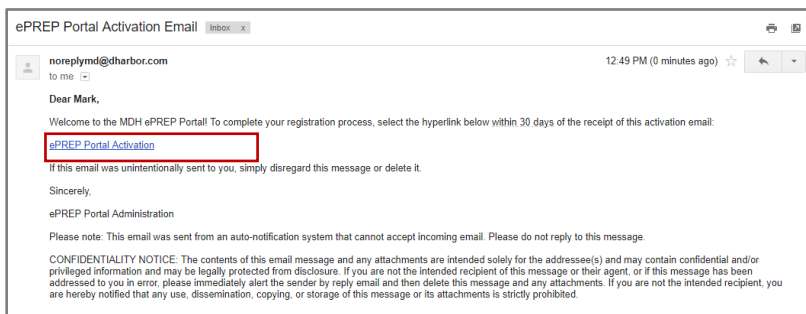
**STEP 1:** Create an ePREP User Profile using the renderer's information and your secondary email address. **NOTE:** do not use your professional email address as you will need that when you create **your own** User Profile. Your email address can only be used once and cannot be used to create another User Profile. If you do not have a secondary email, you should use the renderer's email address and they will have to complete the following steps.



The screenshot shows the ePREP Portal Sign Up form. The form is titled "Sign Up" and includes the following fields: First name, Last name, Phone number, Email address, Re-enter email address, Password, and Re-enter password. The Email address and Re-enter email address fields are highlighted with a red box. There is also a checkbox for "I'm not a robot" and a "Continue" button at the bottom right.

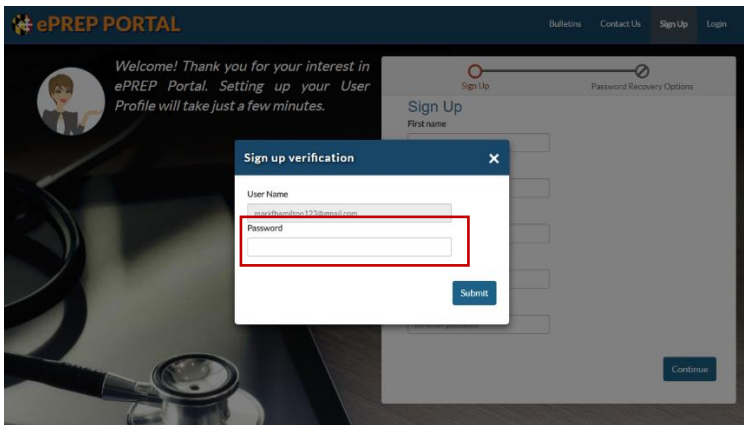
**STEP 2:** ePREP will send an email to the address used to sign up to complete the User Profile activation process.

**STEP 3:** Select the "ePREP Portal Activation" hyperlink



**STEP 4:** ePREP will display the Signup Verification popup

**STEP 5:** Enter your renderer's signup password.



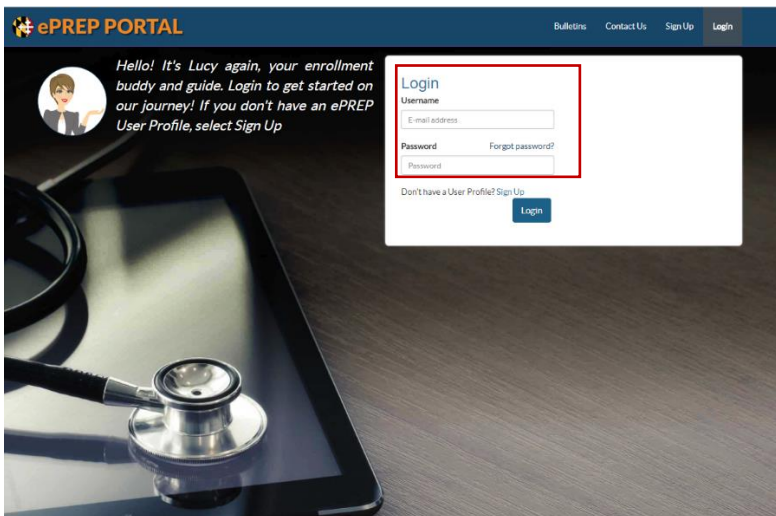
**STEP 6:** The renderer's User Profile is successfully created when ePREP displays the Login Page and prompts you to create a Business Profile.

**STEP 7:** Now continue below to the instructions for **Create Business Profile for Renderer.**

## CREATING A BUSINESS PROFILE FOR A RENDERER

**STEP 1:** ePREP will display the login page

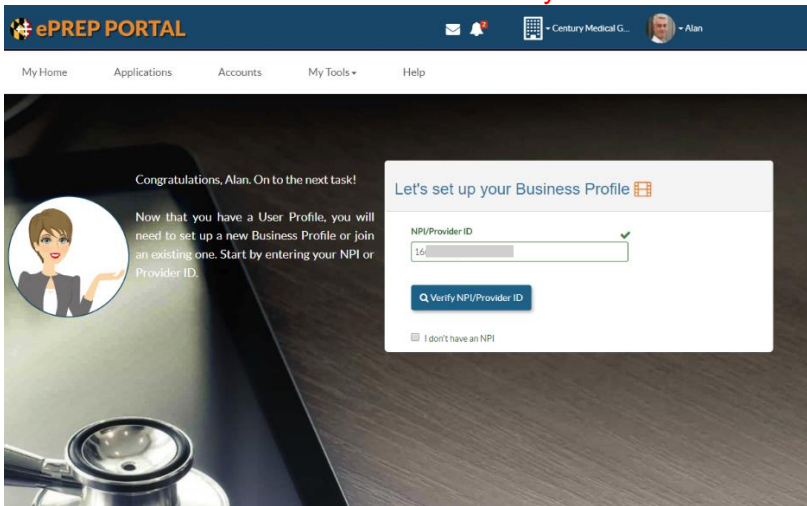
**STEP 2:** Enter your renderer's password



**STEP 3:** ePREP will present the Create Business Profile page



**STEP 4:** Enter the NPI for the renderer you created for the User Profile and select *Verify NPI/Provider ID*

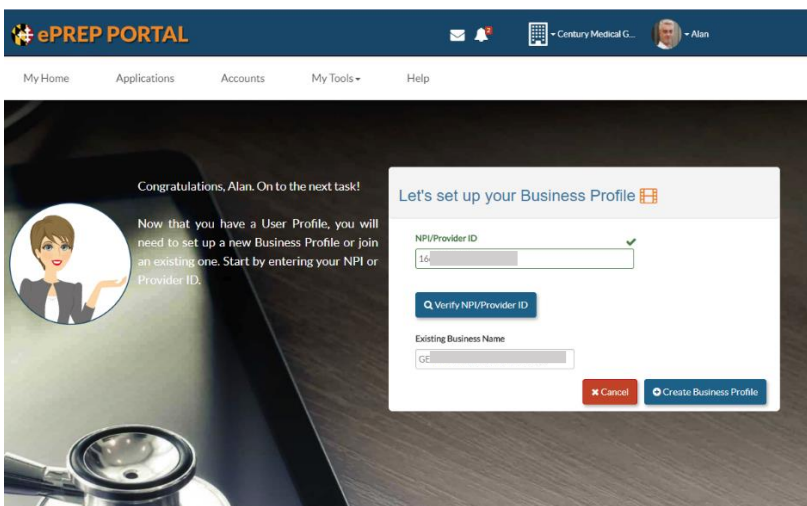


**STEP 5:** If the NPI is already active and enrolled in Maryland Medicaid, ePREP will find one or more Accounts based on the NPI to auto-fill the Business Profile Name with the provider's name from their Medicaid provider file.

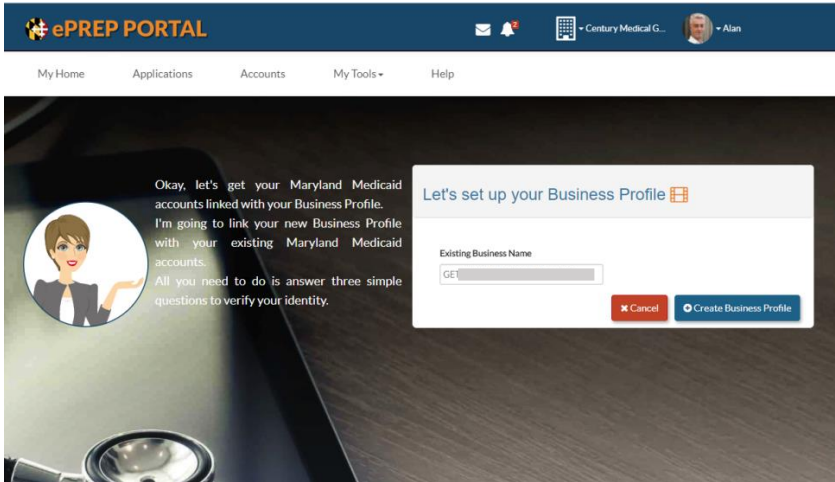
**If the NPI is new to Maryland Medicaid, ePREP will prompt you to create a Business Profile Name.**

You should enter the rendering provider's name, then proceed to **STEP 1** under **Change Email Address for Renderer's User Profile** on page 9.

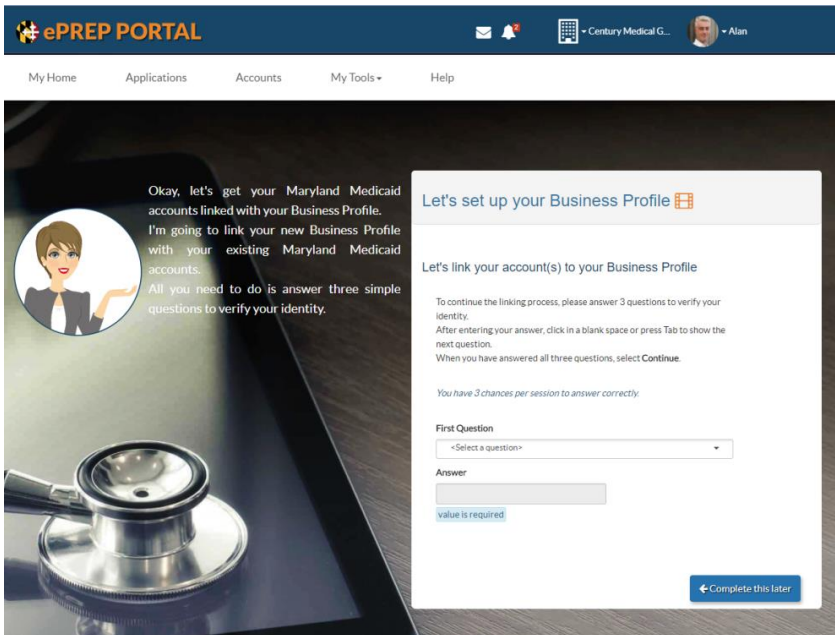
**STEP 6:** If the Business Profile name is correct, select the *Create Business Profile* button otherwise, reenter the NPI or select the *Cancel* button



**STEP 7:** If you want to change the Business Profile name, please do so at this time otherwise, select the Create Business Profile button



**STEP 8:** Complete the validation questions as outlined. You may make three mistakes per session, carefully answer each question correctly. If you make three mistakes you can still create the Business Profile, then go to the *Accounts* tab once the Business Profile is active.





## CHANGE EMAIL ADDRESS FOR RENDERER'S USER PROFILE

- STEP 1:** Before doing anything in the system, Go to top right corner and select "User Settings" from drop down next to Renderer's name
- STEP 2:** Within "User Settings", select the "Change Email" button.
- STEP 3:** Change the email address from the secondary email you used to create user profile for renderer to **the renderer's personal email**.
- STEP 4:** Save changes updating email address to that of the renderer's. Remain logged in as renderer.
- STEP 5:** Email with the rendering provider his/her username, password and security questions and answers. This is to ensure the renderer has access to their own information as well.

## ASSIGN PRIVILEGES/ROLES TO RENDERER'S BUSINESS PROFILE

- STEP 1:** Remain logged in as renderer after changing renderer's email address. Go to "My Tools" in tool bar and select "User Administration."
- STEP 2:** Select "+Invite User" from User Administration page.
- STEP 3:** Enter **YOUR** information and select Continue.
- STEP 4:** Assuming you haven't created a User Profile for yourself, ePREP message appears identifying you as unknown to ePREP. If the information is correct, Select "Invite Anyway." If you already created a User Profile for yourself, proceed to step 37
- STEP 5:** Select the privilege type that the rendering provider permits you to have. You may select each role to review the privileges permitted once assigned. Once you've identified the appropriate privileged role, select continue.
- STEP 6:** Review and confirm information entered from step 35 to 37 is correct. Then, select "Send Invitation." This will send an email to your email address prompting you to sign up as a User Profile in order to accept your role within the renderer's business profile.
- STEP 7:** Click on the link within the email. Follow steps 1-6 to create your user profile.