



ENROLLMENT USER GUIDE

Inovalon Claims Management Pro

July 10, 2023

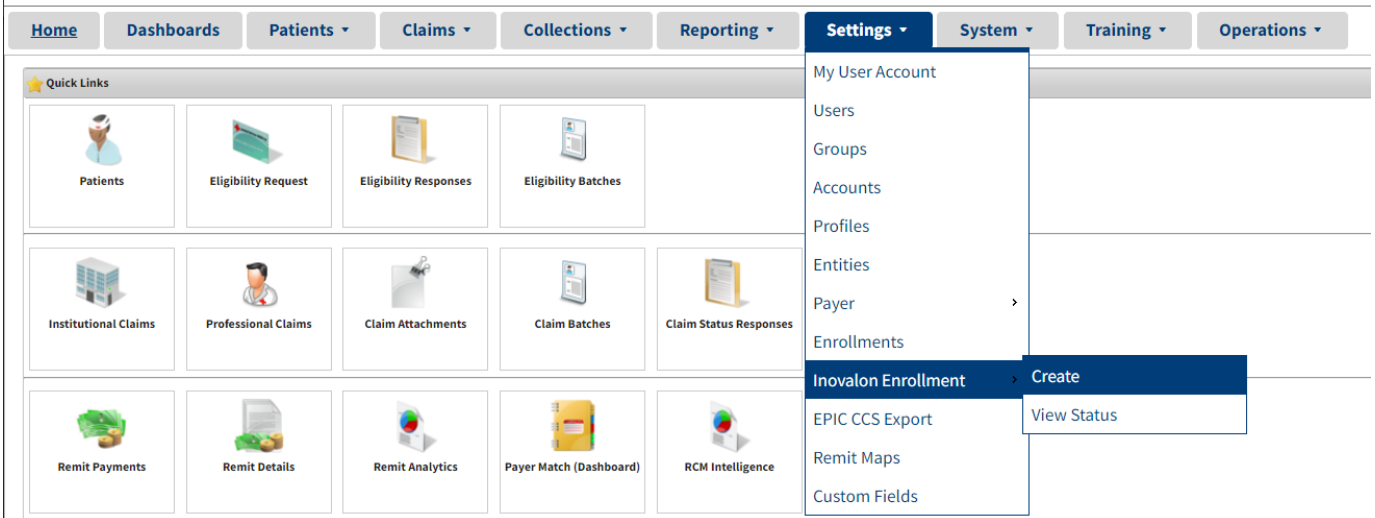
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Mass Enrollment Process

1. Navigate to the **Inovalon Enrollment Create** screen.
 - Settings → Inovalon Enrollment → Create

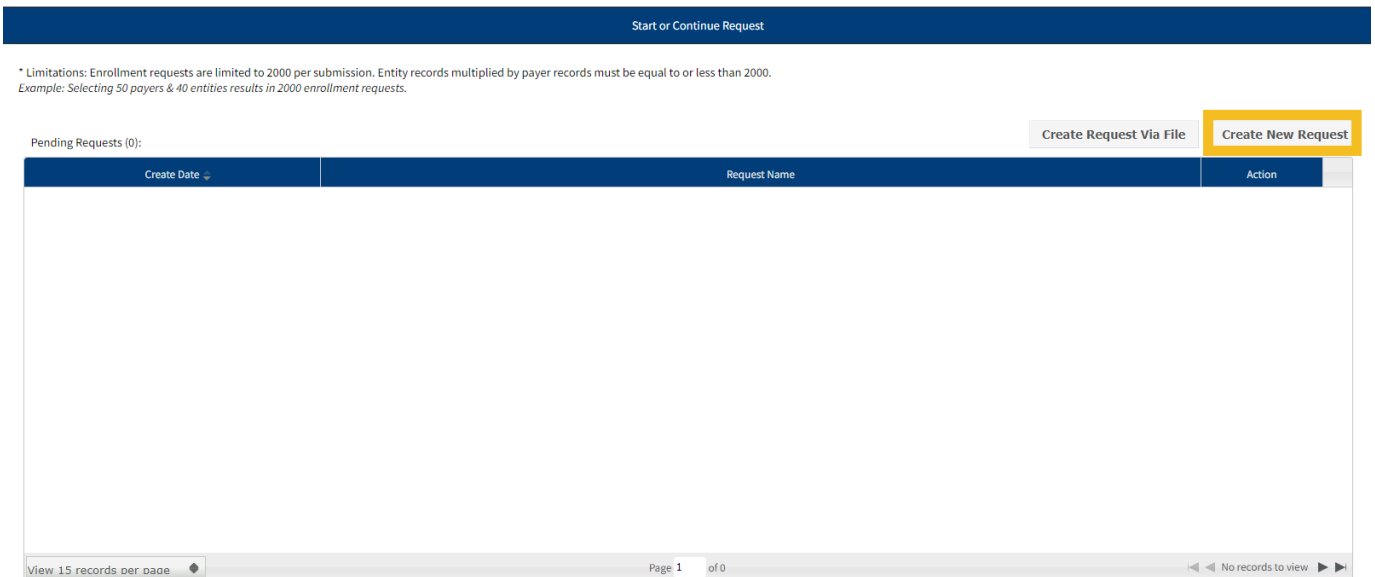
Claims Management Pro



The screenshot shows the 'Claims Management Pro' interface. At the top, there is a navigation bar with tabs: Home, Dashboards, Patients, Claims, Collections, Reporting, Settings, System, Training, and Operations. The 'Settings' tab is selected, and a dropdown menu is open, showing options: My User Account, Users, Groups, Accounts, Profiles, Entities, Payer, Enrollments, Inovalon Enrollment, EPIC CCS Export, Remit Maps, and Custom Fields. The 'Inovalon Enrollment' option is highlighted, and its sub-menu is open, showing 'Create' and 'View Status'. Below the navigation bar is a 'Quick Links' section with a grid of icons for: Patients, Eligibility Request, Eligibility Responses, Eligibility Batches, Institutional Claims, Professional Claims, Claim Attachments, Claim Batches, Claim Status Responses, Remit Payments, Remit Details, Remit Analytics, Payer Match (Dashboard), and RCM Intelligence.

2. In the upper right-hand corner, choose **Create New Request**.

Create Enrollment Request



The screenshot shows the 'Create Enrollment Request' screen. At the top, there is a dark blue header with the text 'Start or Continue Request'. Below the header, there is a note: '* Limitations: Enrollment requests are limited to 2000 per submission. Entity records multiplied by payer records must be equal to or less than 2000. Example: Selecting 50 payers & 40 entities results in 2000 enrollment requests.' Below the note, there is a section for 'Pending Requests (0):'. On the right side of this section, there are two buttons: 'Create Request Via File' and 'Create New Request'. Below the buttons is a table with columns: 'Create Date', 'Request Name', and 'Action'. The table is currently empty. At the bottom of the screen, there is a footer with the text 'View 15 records per page', 'Page 1 of 0', and 'No records to view'.

- You can now start your enrollment selection by Facility or Payer by choosing one of the options on the screen.

Enrollment Selection Order

Please indicate which entity type you would like to select first:

Facilities/Physicians

Payer and Transaction Types

- When you choose the **Facilities/Physicians** button, you will be taken to the screen to add your facilities or physicians for enrollment. In the upper right-hand corner, you will notice two buttons to add the pertinent enrollment information.
 - To add Facilities: Click the **Add Facilities** button.
 - To add Physicians: Click the **Add Physicians** button.

Add Physicians

Add Facilities

- When selecting either of the options above, a new search and selection box appears. In this box, the list of available entity records matching either the Facility or Physicians listed within your Inovalon Claims Management account will display as selections to enroll.

Add Entities

Select	Account	Entity	EIN	NPI	CRMID	Prov ID	Description
<input type="checkbox"/>	ability demo	ABILITY ENROLLMENT INC	123456789	1234567892	25212	14062	
<input type="checkbox"/>	ability demo	DEMO CLINIC	987654327	9876543210	25212	14062	
<input type="checkbox"/>	ability demo	DEMO CLINIC	987654327		25212	14062	

Page 1 of 1

- You have the option to select multiple facilities or physicians from this list, which allows you to create multiple enrollment requests simultaneously. To select a facility/physician, click the checkbox next to the entities you wish to enroll and click **Apply** in the bottom right-hand corner of the screen. After adding all the facilities/physicians you need to enroll, click the **Continue** button in the bottom right-hand side of your enrollments screen. You will now be moved to the **Payer Selection** screen.

Create Enrollment Request

Select Facilities/Physicians

To add facilities, click 'Add Facilities'
To add physicians, click 'Add Physicians'
To remove facilities/physicians, click the 'Remove' icon to the right

Selected Entities (0):

Type	Account	Entity	EIN	NPI	CRMID	Prov ID	Description
<input type="checkbox"/>	ability demo	ABILITY ENROLLMENT INC	123456789	1234567892	25212	14062	
<input type="checkbox"/>	ability demo	DEMO CLINIC	987654327	9876543210	25212	14062	
<input type="checkbox"/>	ability demo	DEMO CLINIC	987654327		25212	14062	

Page 1 of 1

Search Clear

Apply Cancel Clear

View 15 records per page Page 1 of 0 No records to view

Cancel Save Continue

- Click the **Add Payers** button in the upper right-hand corner of the Payer Selection Screen. The **Add Payers** selection box will now display.

Create Enrollment Request

Select Payers/Transaction Types

Any transaction types with "-" indicate no enrollment required
Any transaction types with "N/A" indicate transaction type not configured

Selected Payers (2):

Name	Alias	Payer ID	Prof Claims	Inst Claims	ERA	Remove
Absolute Total Care	ABSOLUTE_CARE	68069	-	-	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	<input type="button" value="Remove"/>
AARP	AARP	36273	-	-	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	<input type="button" value="Remove"/>

View 15 records per page Page 1 of 1 View 1 - 2 of 2

Back Cancel Save Review

8. You can search this screen by **Payer ID, Payer Name, or Claim Indicator Code.**
 - You have the option to select multiple payers from this list, which allows you to create multiple enrollment requests simultaneously.
 - To select a payer, click the checkbox next to the payer you wish to enroll and click **Apply** in the bottom right-hand corner of the screen.

Add Payers

Select	Alias	Claim Indicator	Name	Payer Id	State
<input type="checkbox"/>	MCAIDMI		Medicaid Michigan Pending Eligibility New Enrollment Only	13800	
<input type="checkbox"/>	MCDMIPENDING		Medicaid Michigan - Pending Eligibility (MI)	12980	
<input type="checkbox"/>	MIMCAID	MC	Medicaid Michigan (MI)	D00111,10466,D00111,D00	MI
<input type="checkbox"/>	MIMCD		Medicaid Michigan - Eligibility	13799	
<input type="checkbox"/>	MNMCAID	MC	Medicaid Minnesota (MN)	411674742,AID38,41167474	MN
<input type="checkbox"/>	MOMCAID	MC	Medicaid Missouri (MO)	431754897,AID03,43175489	MO
<input type="checkbox"/>	MSMCAID	MC	Medicaid Mississippi (MS)	77032,AID20,77032,77032	MS

Page 1 of 1

9. After adding all the Payers you need to enroll, you will now see that your payers are listed in the **Add Payers** screen. From here select the transaction types for which your facilities/physicians need to enroll. Do this by simply clicking the checkboxes located under the Transaction type columns you wish to enroll.

Name	Alias	Payer ID	Prof Claims	Inst Claims	ERA	Remove
Medicaid Missouri (MO)	MOMCAID	431754897	-	-	<input type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	-
Medicaid Mississippi (MS)	MSMCAID	77032	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	-
Medicaid Minnesota (MN)	MNMCAID	411674742	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	-
LA County DMH	LACOUNTY	953893470	N/A	N/A	N/A	-
Aetna	AETNA	60054	-	-	<input type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	-

- You will notice that some enrollments have multiple checkboxes available, while others have “-“ or **N/A**.
 - Transactions that have a “-“ do not require enrollment and are available for you to leverage immediately.
 - Transactions that have a **N/A** are not currently available in the Inovalon Claims Management system.

10. Once you've selected your transaction types for each payer, click the **Review** button in the bottom right-hand corner.

Create Enrollment Request

Select Payers/Transaction Types

Any transaction types with "-" indicate no enrollment required
Any transaction types with "N/A" indicate transaction type not configured

Selected Payers (5):

Name	Alias	Payer ID	Prof Claims	Inst Claims	ERA	Remove
Medicaid Missouri (MO)	MOMCAID	431754897	-	-	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	⊖
Medicaid Mississippi (MS)	MSMCAID	77032	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	⊖
Medicaid Minnesota (MN)	MNMCAID	411674742	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	⊖
LA County DMH	LACOUNTY	953893470	N/A	N/A	N/A	⊖
Aetna	AETNA	60054	-	-	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	⊖

View 15 records per page Page 1 of 1 View 1 - 5 of 5

Back Cancel Save **Review**

11. The Review screen will display the current status of your request.

- This screen will show the Payers selected, Account Names, Entity Names, NPIs, EINs and Transaction types for the enrollments you are requesting. A **Validation Success** column shows whether these enrollment requests can be completed currently. **PASSED** means this enrollment request is ready to submit through the automated enrollment process. **FAILED** means there is an issue with the requested enrollment.
- To further understand why this enrollment request has failed, click on the blue "i" in the **Action** column.

Create Enrollment Request

Review

Only rows that have been successfully validated (Validation Status of PASSED) will be submitted upon submission
Rows that have not been successfully validated will not be submitted until validated failures are resolved or row is removed from the request

Review count (5):

Payer	Account Name	Entity	NPI	EIN	Transaction Types	Authorized Signer	Legacy Provider IDs	Validation Status	Action
Medicaid Missouri (MO)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ
Medicaid Mississippi (MS)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	Update IDs	PASSED	⊖ ⓘ
Medicaid Minnesota (MN)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ
LA County DMH	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789		Brittney Sappington	N/A	FAILED	⊖ ⓘ
Aetna	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ

View 15 records per page Page 1 of 1 View 1 - 5 of 5

Back Cancel Save Submit

12. The **Enrollment Data Validation Failed** dialogue box displays with reasons why your enrollment request cannot be processed. An example in the screenshot below shows that this entity table reflects missing information: **Entity identification number of type Medicare Number is required.**

- To correct this error, click the blue text which takes you to your entity table configuration for the failed enrollment’s entity record. You will then update the information as appropriate, based on the information in the previous dialogue box and click **Save**.
- Once this has been completed, you will then migrate back to the **Enrollment Data Validation Failed** screen and click the **Revalidate** button

Enrollment Data Validation Failed
✕

The selected entity does not contain all information required to submit an enrollment request. The missing information is detailed below.

- Entity identification of type Medicare Number is required.

To update this information, click [INOVALON ENROLLMENT INC](#) (this will open a new tab).

Complete the missing information, then Save. Return to this screen and click "Revalidate" icon to check validation status.

Cancel Revalidate

Note:

- After revalidation and the enrollment request has “passed,” the record will reflect a green **PASSED** icon on the enrollment in the **Validation Status** column.

Create Enrollment Request

Review

Only rows that have been successfully validated (Validation Status of PASSED) will be submitted upon submission
Rows that have not been successfully validated will not be submitted until validated failures are resolved or row is removed from the request

Review count (5):

Payer	Account Name	Entity	NPI	EIN	Transaction Types	Authorized Signer	Legacy Provider IDs	Validation Status	Action
Medicare Texas (JH-Novitas)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input checked="" type="checkbox"/> Professional ERA	Brittney Sappington		FAILED	⊖ ⓘ
Medicaid Missouri (MO)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ
Medicaid Mississippi (MS)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	Update IDs	PASSED	⊖ ⓘ
Medicaid Minnesota (MN)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ
Aetna	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ

View 15 records per page | Page 1 of 1 | View 1 - 5 of 5

Back
Cancel
Save
Submit

- If you decide not to move forward with this enrollment, you can click the **Cancel** button on the bottom left hand corner this screen.

13. Once you have created your enrollment requests and all have “passed” validation, you can now click the **Submit** button in the bottom right-hand corner of your screen.

- Your enrollment requests have now been submitted and appropriate instructions will be emailed to you within 24 hours.

Create Enrollment Request

Review

Only rows that have been successfully validated (Validation Status of PASSED) will be submitted upon submission
 Rows that have not been successfully validated will not be submitted until validated failures are resolved or row is removed from the request

Review count (5):

Payer	Account Name	Entity	NPI	EIN	Transaction Types	Authorized Signer	Legacy Provider IDs	Validation Status	Action
Medicare Texas (JH-Novitas)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input checked="" type="checkbox"/> Professional ERA	Brittney Sappington		FAILED	⊖ ⓘ
Medicaid Missouri (MO)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ
Medicaid Mississippi (MS)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	Update IDs	PASSED	⊖ ⓘ
Medicaid Minnesota (MN)	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ
Aetna	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input checked="" type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	⊖ ⓘ

View 15 records per page Page 1 of 1 View 1 - 5 of 5

Back Cancel Save **Submit**

Enrollment Cancellations

1. Navigate to the **View Status** screen.
 - Settings → Inovalon Enrollment → View Status

Claims Management Pro

TEST MODE

Home Dashboards Patients Claims Collections Reporting Settings System Training Operati

Create Enrollment Request

Start or Continue

* Limitations: Enrollment requests are limited to 2000 per submission. Entity records multiplied by payer records must be equal to or less than 2000.
 Example: Selecting 50 payers & 40 entities results in 2000 enrollment requests.

Pending Requests (1):

Create Date	Entity	Payer
2023-07-10 14:43:34	au	

My User Account
 Users
 Groups
 Accounts
 Profiles
 Entities
 Payer
 Enrollments
Inovalon Enrollment

- Create
- View Status**

 EPIC CCS Export
 Remit Maps
 Custom Fields

Create Requ

- Navigate to the enrollment you wish to Cancel via the Profiler or the Quick Search options at the top of the Enrollment Status screen.

Claims Management Pro

Brittney Sappington | Logout
TPC System Operations (abilitydemo) Upload Files

TEST MODE

Home Dashboards Patients Claims Collections Reporting Settings System Training Operations

Enrollment Requests (0) Rows Selected [Deselect All](#)

Quick Search Profiler

Payer Name Status EIN (Tax ID) NPI

Search Clear Ignore Profiler Filters

Create Enrollment Enrollment Actions Reload Grid Update Columns Export Wizard

External Site ID	External Enrollment ID	Partner Alias	Facility Name	EIN (Tax ID)	Facility NPI	Payer Name	Transaction Type	Status	Created Time (UTC)	Payer ID	Updated Time (UTC)	Internal Status	Closed Reason	Legacy Provider ID	Last Activity	CreatedBy	Payer Follow-Up Date	Action
						Southwest Service Administrators	Professional ERA	SCHEDULED	07/10/23 20:02:50	12956	07/10/23 20:02:55	SENT						
						United Medical Resources UHC PPO	Professional ERA	SCHEDULED	07/10/23 20:02:50	39026	07/10/23 20:02:56	SENT						
						OPTUM CARE NETWORK	Professional ERA	SCHEDULED	07/10/23 20:02:50	OCN01	07/10/23 20:02:57	SENT						
						MODA (Ina ODS Health Plan)	Professional ERA	SCHEDULED	07/10/23 20:02:49	13350	07/10/23 20:02:51	SENT						
						Physicians Mutual Insurance Company	Professional ERA	SCHEDULED	07/10/23 20:02:49	47027	07/10/23 20:02:52	SENT						
						GMP Employers Retiree Trust	Professional ERA	SCHEDULED	07/10/23 20:02:49	GMPEMP	07/10/23 20:02:54	SENT						

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Profiler

© Inovalon 2023 | All Rights Reserved. | Mode: TEST | Session Expiration: 58:33

- If you see the red “X” icon under the **Action** Column, this enrollment can be cancelled.
- Click the Red X Icon and the Cancel Automated Enrollment box populates.
 - Choose a **Cancel Reason** from the drop-down list and add a cancellation note if you would like.
 - Then click the **Save** button and your enrollment will be sent for cancellation.

Cancel Automated Enrollment

Cancel Details

Cancel Reason

Add Cancel Note

INCOMPLETE OR INACCURATE DATA DETECTED

INCOMPLETE OR INACCURATE DATA DETECTED

MISSING VALUES

NOT ELIGIBLE TO ENROLL

OTHER DATA ISSUE

PROVIDER CANCEL- NOT WANTING TO ENROLL

PROVIDER CANCEL- SWITCHING VENDOR

PROVIDER CANCEL- WRONG PLAN

PROVIDER CANCEL- WRONG TRANSACTION TYPE

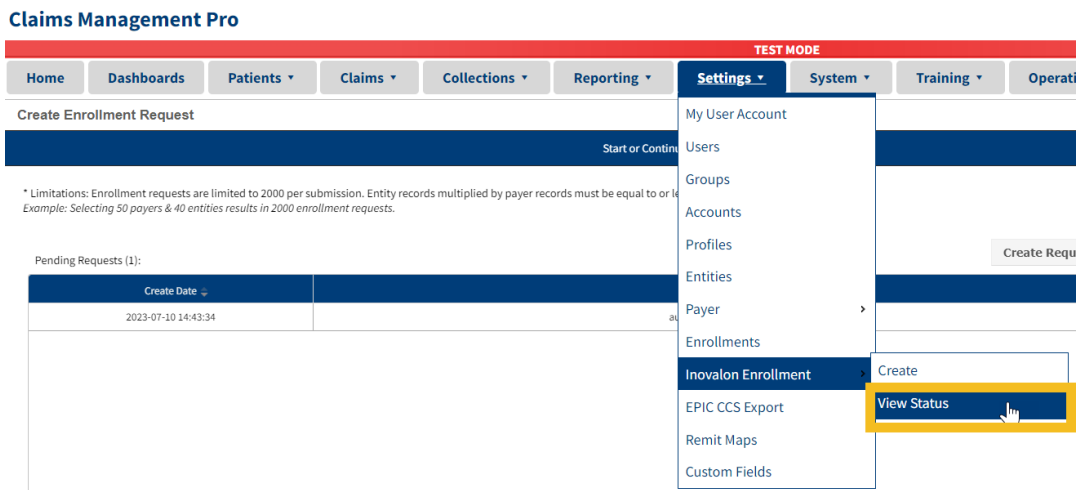
REQUESTED BY PARTNER

Save Cancel

Restarting an Enrollment from Enrollment View Status Grid

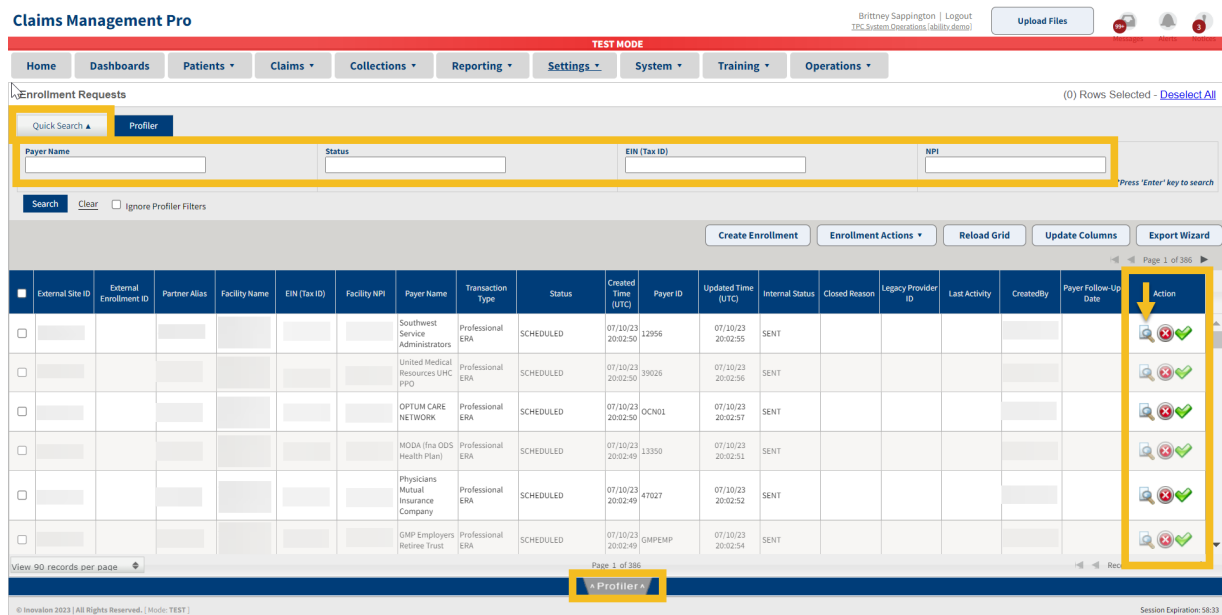
There may be some instances where your enrollment requests pass validation, but after further review, the Inovalon Claims Management system catches another potential issue and will cause this enrollment to fail. When this occurs, you will need to navigate to the failed enrollment and restart. You will first need to verify all the data on the appropriate entity table and save any changes.

1. Navigate to the **View Status** screen.
 - Settings → Inovalon Enrollment → View Status



The screenshot shows the 'Claims Management Pro' interface. The 'Settings' dropdown menu is open, and the 'Inovalon Enrollment' option is selected. The 'View Status' option under 'Inovalon Enrollment' is highlighted with a yellow box.

2. Navigate to the enrollment you wish to Restart via the Profiler or the Quick Search options at the top of the Enrollment Status screen. To restart an enrollment, simply click **Magnifying Glass** icon located in the Action column on the Enrollment Request grid.



The screenshot shows the 'Enrollment Requests' screen. The 'Profiler' tab is selected. The search filters for Payer Name, Status, EIN (Tax ID), and NPI are highlighted with a yellow box. The 'Action' column in the grid is also highlighted with a yellow box, showing a magnifying glass icon for each row. The 'Profiler' button at the bottom is also highlighted with a yellow box.

External Site ID	External Enrollment ID	Partner Alias	Facility Name	EIN (Tax ID)	Facility NPI	Payer Name	Transaction Type	Status	Created Time (UTC)	Payer ID	Updated Time (UTC)	Internal Status	Closed Reason	Legacy Provider ID	Last Activity	CreatedBy	Payer Follow-Up Date	Action
						Southwest Service Administrators	Professional ERA	SCHEDULED	07/10/23 20:02:50	12956	07/10/23 20:02:56	SENT						[Magnifying Glass]
						United Medical Resources UHC PPO	Professional ERA	SCHEDULED	07/10/23 20:02:50	19026	07/10/23 20:02:56	SENT						[Magnifying Glass]
						OPTUM CARE NETWORK	Professional ERA	SCHEDULED	07/10/23 20:02:50	OCN01	07/10/23 20:02:57	SENT						[Magnifying Glass]
						MODA (Ina ODS Health Plan)	Professional ERA	SCHEDULED	07/10/23 20:02:49	3350	07/10/23 20:02:51	SENT						[Magnifying Glass]
						Physicians Mutual Insurance Company	Professional ERA	SCHEDULED	07/10/23 20:02:49	17027	07/10/23 20:02:52	SENT						[Magnifying Glass]
						GMP Employers Retiree Trust	Professional ERA	SCHEDULED	07/10/23 20:02:49	GMPEMP	07/10/23 20:02:54	SENT						[Magnifying Glass]

- The Enrollment Request Detail dialogue box will populate. Choose the **Restart** button in the bottom right-hand corner to restart this enrollment.

Enrollment Request

Enrollment Request Details

Version	CURRENT
Payer	Medicare Florida (JN-FCSO)
Payer ID	09102
External Site ID	EAP_14062
External Enrollment ID	
Facility Entity	ABILITY ENROLLMENT INC
EIN (Tax ID)	123456789
NPI	1234567892
Transaction Type	Professional ERA
Legacy Provider ID	MEDICARE :: 456
Status	Failed to initiate enrollment process
Internal Status	FAILED
Payer Follow-up Date	
Failure Reason	1 failure condition: Site already exists.
Created By	Felicia Coates (Support)

Enrollment Activity Log

Note: All dates are in UTC

Restart

Close

- You will then be redirected to the **Create Enrollment Request** screen and will click the **Review** button in the bottom right-hand corner of the Facility selection screen.

Create Enrollment Request Select Facilities/Physicians

To add facilities, click 'Add Facilities'
 To add physicians, click 'Add Physicians'
 To remove facilities/physicians, click the 'Remove' icon to the right

Selected Entities (1):

Select Group

Save Group

Add Physicians

Add Facilities

Type	Account	Alias	Entity	NPI	Facility EIN	CRMID	Remove
FACILITY	ability demo	A1234	ABILITY ENROLLMENT INC	1234567892	123456789	25212	-

View 15 records per page
Page 1 of 1
View 1 - 1 of 1

Back

Cancel

Save

Review

- You will now notice that the Validation Status reflects a “Duplicate” status. Click on the blue “i” icon in the **Action** column on the right and the Enrollment confirmation dialogue box populates.
- In this screen, you will now click the **Yes, Submit All** button to allow this enrollment to be restarted.

Enrollment Confirmation ✕

The request will submit the following details:

Payer Name	Aetna
Enrollment Name	ABILITY ENROLLMENT INC
EIN (Tax ID)	123456789
NPI	1234567892
Authorized Signer	Brittney Sappington
Transaction Type(s)	Professional ERA

The following request(s) have been completed already. Would you like to resubmit them alongside with the new requests?

Transaction Type	Status	Status Detail
ERA	Closed	CLOSED


No, Review My Selections
Yes, Submit All



- The Validation Status will now update to **Passed** and you can select the **Submit** button in the bottom right-hand corner of your screen to successfully transmit your new enrollment request.

Create Enrollment Request



Only rows that have been successfully validated (Validation Status of PASSED) will be submitted upon submission
 Rows that have not been successfully validated will not be submitted until validated failures are resolved or row is removed from the request

Review count (1): 

Payer	Account Name	Entity	NPI	EIN	Transaction Types	Authorized Signer	Legacy Provider IDs	Validation Status	Action
Aetna	ability demo	ABILITY ENROLLMENT INC	1234567892	123456789	<input type="checkbox"/> Institutional ERA <input checked="" type="checkbox"/> Professional ERA	Brittney Sappington	N/A	PASSED	 

View 15 records per page

Page 1 of 1

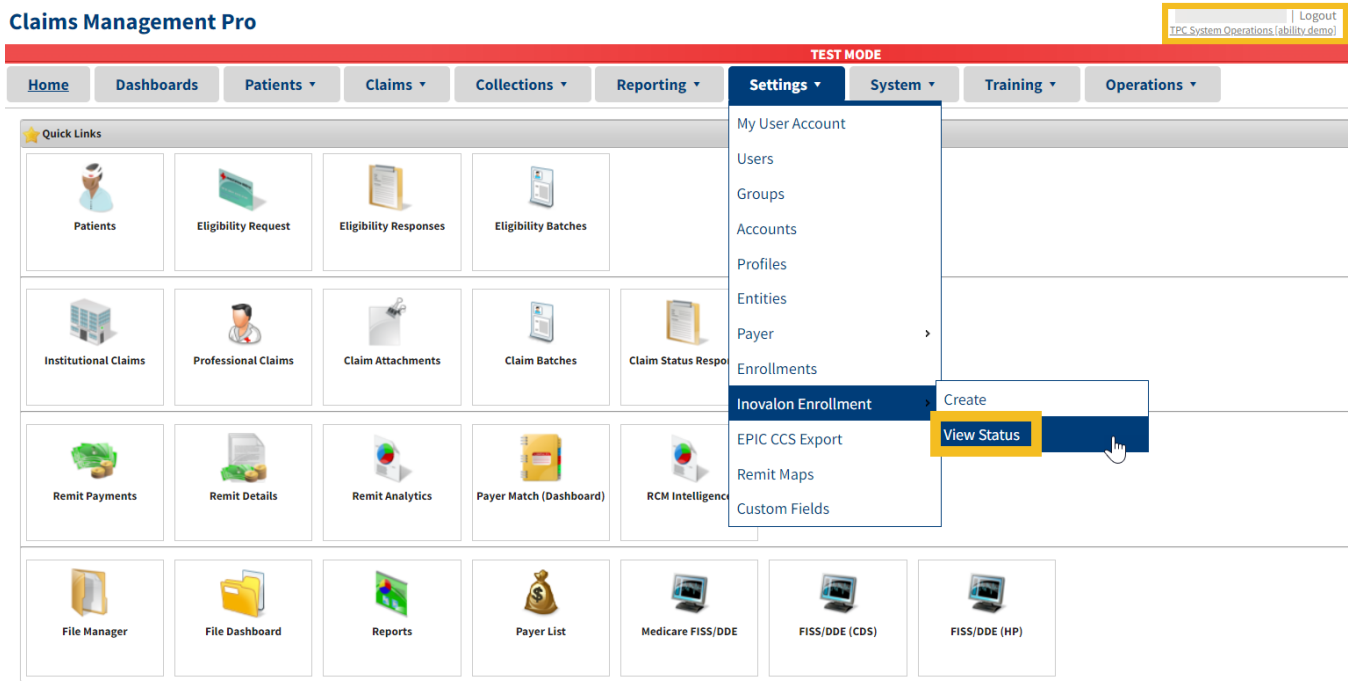
View 1 - 1 of 1

Back
Cancel
Save
Submit

Enrollment Status Checks

- Navigate to the Inovalon Enrollment View Status Screen.
 - Settings → Inovalon Enrollment → View Status

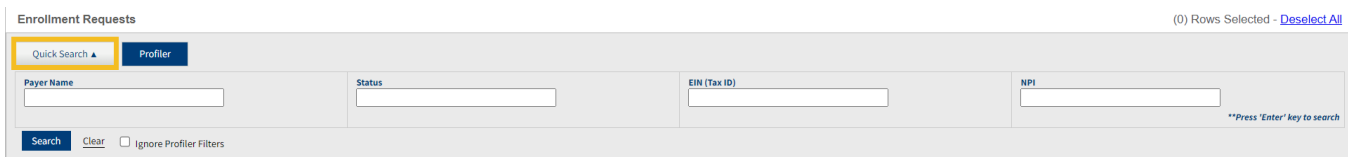
Claims Management Pro



The screenshot shows the Inovalon Claims Management Pro interface. At the top right, there is a 'Logout' button and a user profile 'TPC System Operations (ability_demo)'. Below this is a navigation bar with tabs: Home, Dashboards, Patients, Claims, Collections, Reporting, Settings, System, Training, and Operations. The 'Settings' tab is selected, and its dropdown menu is open, showing options like My User Account, Users, Groups, Accounts, Profiles, Entities, Payer, Enrollments, Inovalon Enrollment, EPIC CCS Export, Remit Maps, and Custom Fields. The 'Inovalon Enrollment' option is highlighted, and its sub-menu is open, showing 'Create' and 'View Status' (which is highlighted with a yellow box and a mouse cursor).

Note: Any enrollments for any accounts you have selected on your Account Selection Screen in the upper right will populate when you open the Enrollment View Status grid. You are still able to filter out the data you wish to see by using the Profiler or the Quick Search Option on the grid.

- There are two ways to sort and filter your Enrollment information.
 - Option 1:** Choose the **Quick Search** button at the upper left-hand side of the *Enrollment Requests grid*.
 - You can then filter by **Payer Name**, **Status**, **EIN (Tax ID)**, or **NPI** by filling out the appropriate information and clicking the **Search** button.



The screenshot shows the 'Enrollment Requests' grid's search and filter interface. At the top right, it says '(0) Rows Selected - Deselect All'. Below this is a search bar with 'Quick Search' and 'Profiler' buttons. The search bar contains four input fields: 'Payer Name', 'Status', 'EIN (Tax ID)', and 'NPI'. Below the search bar are 'Search', 'Clear', and 'Ignore Profiler Filters' buttons. A note at the bottom right says '**Press 'Enter' key to search'.

- **Option 2:** Click the **Profiler** button to filter with more detailed data. Click Apply in the upper right corner once you have finished choosing your filter options.
 - Example: **Created Date, Transaction Type, Status, Provider, Payer, etc.**

Enrollment Requests (0) Rows Selected - [Deselect All](#)

Profiler

Load Profiler: < Select Profile >

Current Settings
Partner in 14062 Status in FAILED

Filters | Sorting

Filters

Events	Enrollment	Status	Provider
Created <input type="checkbox"/> Today <input type="checkbox"/> Date Range <input type="checkbox"/> Date Within	System <input type="checkbox"/> ID <input type="text"/> Type <input type="checkbox"/> Facility <input type="checkbox"/> Physician Transaction <input type="checkbox"/> Institutional Claims <input type="checkbox"/> Professional Claims <input type="checkbox"/> Institutional ERA <input type="checkbox"/> Professional ERA <input type="checkbox"/> ERA Moved Enrollments <input type="checkbox"/> Include Previous Versions <input type="checkbox"/>	<input type="checkbox"/> On hold <input type="checkbox"/> Scheduled <input type="checkbox"/> Pending - Provider <input type="checkbox"/> Pending - Payer <input type="checkbox"/> Duplicate <input checked="" type="checkbox"/> Failed <input type="checkbox"/> Retry <input type="checkbox"/> Hold Live <input type="checkbox"/> Cancelled <input type="checkbox"/> Rejected <input type="checkbox"/> Provider Action	<input checked="" type="checkbox"/> Partner List (1) <input type="button" value="Choose"/> <input type="checkbox"/> Partner Alias List <input type="checkbox"/> Facility List <input type="checkbox"/> Physician List <input type="checkbox"/> EIN List <input type="checkbox"/> NPI List
Updated <input type="checkbox"/> Today <input type="checkbox"/> Date Range <input type="checkbox"/> Date Within			
Last Activity <input type="checkbox"/> Today <input type="checkbox"/> Date Range <input type="checkbox"/> Date Within			
Payer Follow-up <input type="checkbox"/> Today <input type="checkbox"/> Date Range <input type="checkbox"/> Date Within			
Cancel Requested <input type="checkbox"/> Date Within			
	External <input type="checkbox"/> Site ID List <input type="text"/> <input type="checkbox"/> Enrollment ID List <input type="text"/>	Internal Status <input type="checkbox"/> New <input type="checkbox"/> Cancellation Requested <input type="checkbox"/> Hold Live <input type="checkbox"/> Cancelled <input type="checkbox"/> Sent	Payer <input type="checkbox"/> Payer List (0) <input type="button" value="Choose"/> <input type="checkbox"/> Payer ID List <input type="text"/>

Note: All dates are in UTC

© Inovalon 2023 | All Rights Reserved. | Mode: TEST | Session Expiration: 57:44

- Your **Enrollment Requests** grid also has the option to populate multiple columns of information for each individual enrollment request (If you find you need a new column, you can click the **Update Columns** button and choose other data columns you wish to display in the default view).

Enrollment Requests (0) Rows Selected - [Deselect All](#)

Quick Search

Payer Name Status EIN (Tax ID) NPI

Ignore Profiler Filters

**Press 'Enter' key to search

External Site ID	External Enrollment ID	Partner Alias	Facility Name	EIN (Tax ID)	Facility NPI	Payer Name	Transaction Type	Status	Created Time (UTC)	Payer ID	Updated Time (UTC)	Internal Status	Closed Reason	Legacy Provider ID	Last Activity	Creativity	Payer Follow-Up date	Action
<input type="checkbox"/>	EAP_14062		ABILITY ENROLLMENT INC	123456789	1234567892	Medicaid Florida (FL)	Professional Claims	FAILED	06/12/23 13:19:30	77027	06/12/23 13:19:30	FAILED		123			Felicia Coates	<input type="button" value="Info"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	EAP_14062		ABILITY ENROLLMENT INC	123456789	1234567892	Medicaid Florida (FL)	Professional ERA	FAILED	06/12/23 13:19:30	77027	06/12/23 13:19:30	FAILED		123			Felicia Coates	<input type="button" value="Info"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	EAP_14062		ABILITY ENROLLMENT INC	123456789	1234567892	Cigna	Professional ERA	FAILED	06/12/23 13:19:28	62308	06/12/23 13:19:29	FAILED					Felicia Coates	<input type="button" value="Info"/> <input type="button" value="Edit"/>

Page 1 of 4

- The Select Columns dialog box will open. You can then click the available checkboxes to add or remove any data you would like to view on your enrollment view status grid. You can also reorder the columns by clicking the selections on the left and moving them to the order you would like to see them. Once completed, you can click Save and your grid view will be updated.

Select Columns ✕

Selected	Available		
External Site ID	<input type="checkbox"/> Action	<input type="checkbox"/> Approval Mode	<input type="checkbox"/> Cancel Req Date
External Enrollment ID	<input type="checkbox"/> Enrollment Type	<input type="checkbox"/> ID	<input type="checkbox"/> Last Activity Time (UTC)
Partner Alias	<input type="checkbox"/> Legacy Provider ID Type	<input type="checkbox"/> Partner	<input type="checkbox"/> Payer Follow-up
Facility Name	<input type="checkbox"/> Physician NPI	<input type="checkbox"/> Physician Name	<input type="checkbox"/> Status Description
EIN (Tax ID)	<input type="checkbox"/> Version	<input checked="" type="checkbox"/> External Site ID	<input checked="" type="checkbox"/> External Enrollment ID
Facility NPI	<input checked="" type="checkbox"/> Partner Alias	<input checked="" type="checkbox"/> Facility Name	<input checked="" type="checkbox"/> EIN (Tax ID)
Payer Name	<input checked="" type="checkbox"/> Facility NPI	<input checked="" type="checkbox"/> Payer Name	<input checked="" type="checkbox"/> Transaction Type
Transaction Type	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Created Time (UTC)	<input checked="" type="checkbox"/> Payer ID
Status	<input checked="" type="checkbox"/> Updated Time (UTC)	<input checked="" type="checkbox"/> Internal Status	<input checked="" type="checkbox"/> Closed Reason
Created Time (UTC)	<input checked="" type="checkbox"/> Legacy Provider ID	<input checked="" type="checkbox"/> Last Activity	<input checked="" type="checkbox"/> CreatedBy
Payer ID	<input checked="" type="checkbox"/> Payer Follow-Up Date		
Updated Time (UTC)			
Internal Status			
Closed Reason			
Legacy Provider ID			

Save
Cancel

- Once you have filtered your enrollment requests and have your columns view set to your preferences, you can now view additional detail for each enrollment, if necessary.
 - To View an individual enrollment request's history, you can choose the **Magnifying Glass** icon in the action column.

Claims Management Pro Brittney Sappington | Logout
TFC System Operations (ability dump) Upload Files

TEST MODE

Home Dashboards Patients Claims Collections Reporting Settings System Training Operations





Enrollment Requests (0) Rows Selected - Deselect All

Quick Search Profilor

Payer Name Status EIN (Tax ID) NPI

Search Clear Ignore Profiler Filters **Press 'Enter' key to search

Create Enrollment Enrollment Actions Reload Grid Update Columns Export Wizard

External Site ID	External Enrollment ID	Partner Alias	Facility Name	EIN (Tax ID)	Facility NPI	Payer Name	Transaction Type	Status	Created Time (UTC)	Payer ID	Updated Time (UTC)	Internal Status	Closed Reason	Legacy Provider ID	Last Activity	CreatedBy	Payer Follow-Up Date	Action
<input type="checkbox"/>	EAP_14062	3167646	A1234	DEMO CLINIC	987654321	9875641234	Medicaid Alaska (AK)	Institutional ERA	APPROVED	12/04/19 20:29:06	12/04/19 20:29:32	SENT		123456789	Request auto approved without payer confirmation	Kati Pierce		
<input type="checkbox"/>	EAP_14062	3167655	A1234	DEMO HOSPITAL	987654321	1234567890	Medicaid Alaska (AK)	Institutional ERA	APPROVED	12/04/19 20:29:06	12/04/19 20:29:49	SENT		569874	Request auto approved without payer confirmation	Kati Pierce		
<input type="checkbox"/>	EAP_14062	3167634	A1234	DEMO CLINIC	987654321	9875641234	Cigna	Institutional ERA	APPROVED	12/04/19 20:29:05	12/06/19 22:08:45	SENT			Request approved by payer	Kati Pierce		
<input type="checkbox"/>	EAP_14062	3167635	A1234	DEMO CLINIC	987654321	9875641234	Cigna	Professional ERA	APPROVED	12/04/19 20:29:05	12/06/19 22:08:43	SENT			Request approved by payer	Kati Pierce		

- Once selected, an **Enrollment Request** dialog box appears with historical and current status information for the enrollment.

✕

📄 **Enrollment Request Details**

Version	CURRENT
Payer	Medicaid Alaska (AK)
Payer ID	12K86
External Site ID	EAP_14062
External Enrollment ID	3167646
Facility Entity	<u>DEMO CLINIC</u>
EIN (Tax ID)	987654321
NPI	9875641234
Transaction Type	Institutional ERA
Legacy Provider ID	MEDICAID :: 123456789
Status	Successfully Completed
Internal Status	SENT
Payer Follow-up Date	
Created By	Kati Pierce (Support)

Enrollment Activity Log

Created Date	Activity
12/04/19 20:29:32	Request auto approved without payer confirmation

Note: All dates are in UTC
Restart
Close

Enrollment Status Meanings

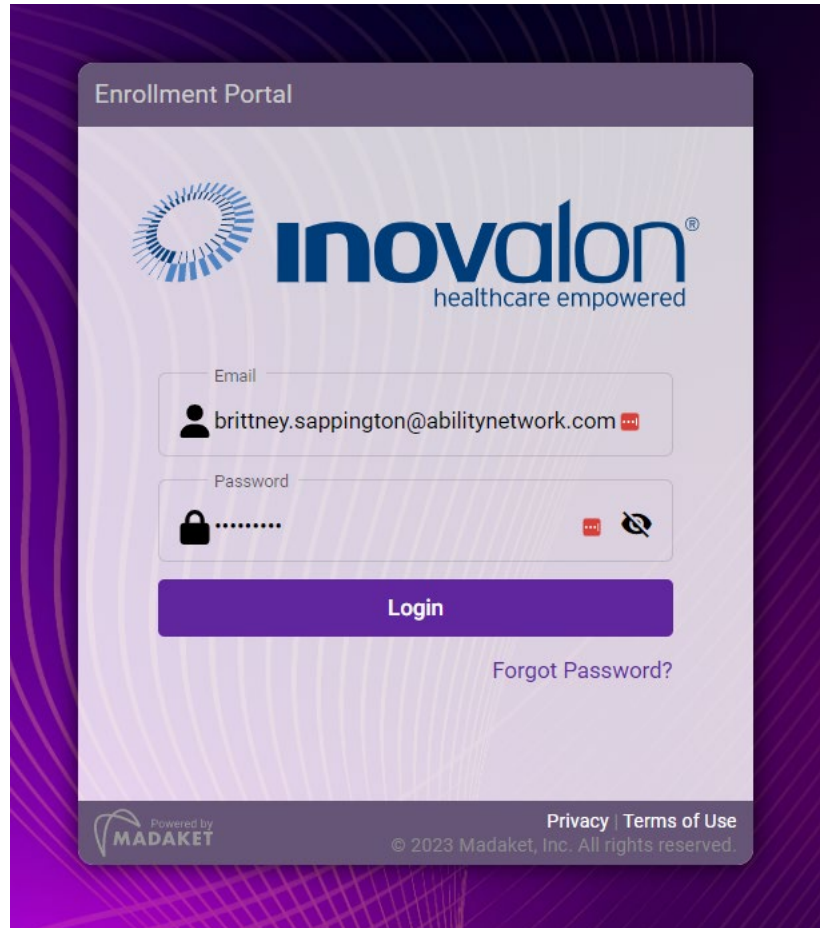
Status	Status Description	Activity (Latest)	Next Step Owner	Next Step
FAILED	Failed to Initiate Enrollment Process	(NONE)	Customer	Verify Entity Table information and restart enrollment.
On Hold	ERA enrollment on hold	(NONE)	Customer	Claims for the ERA payer must be submitted through Claims Management before ERA Enrollment will release for enrollment task creation.
SCHEDULED	Scheduled for Processing	(NONE)	Automatic Process	Enrollment task will be created and sent to Enrollment Contact in Entity Table for completion, if required.
PENDING PROVIDER	In Progress	Task or Signature Request Sent to Provider OR Inovalon reached out to Provider for Follow-up.	Customer	Complete paperwork/instructions sent by Enrollment Team.
PENDING PAYER	In Progress	Request/Form Sent to Payer	Inovalon Enrollment	Enrollment team to track progress with the Payer.
APPROVED	Successfully Completed	Request Approved by Payer OR Request Auto-Approved Without Payer Confirmation	NONE	NONE
REJECTED	Request Rejected by Payer	Request Rejected by Payer. Reason:	Customer	Review rejection. Correct any missing/invalid data and re-enroll. If you do not wish to re-enroll, ignore rejection.
CANCELLED	Cancelled	Canceled by: (Varies) Reason: (Varies)	Customer	Confirm if enrollment needs to be restarted or truly not needed due to wrong plan, wrong transaction type, etc.

Based upon the status of your enrollment request, you should be able to discern next steps, if any, on how to complete your enrollment or view its current state.

Inovalon Enrollment Portal

Logging into the Enrollment Portal

1. Open your web browser and navigate to: <https://invalon-enrollportal.madakethealth.com/login>



2. Your email address is your login and enter in the password you created.

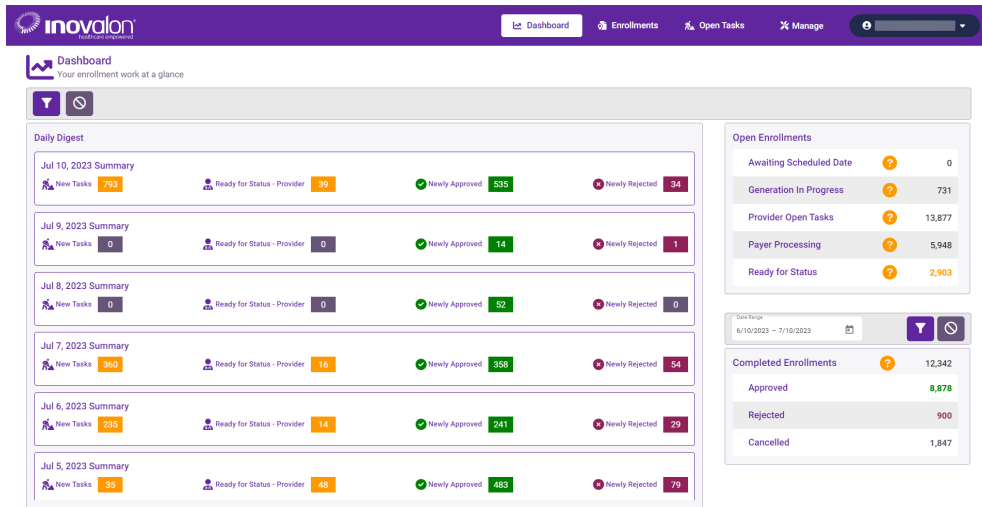
NOTE: If you have never logged into the Inovalon Enrollment Portal, review your email for a Welcome email with a link to setup your password.

NOTE: If you have forgotten your password, please click "Forgot Password" and enter your email address so an updated link can be emailed to you.

General Portal Navigation

Dashboard - Daily Digest

1. Upon logging into the Inovalon Enrollment Portal, you default to the Enrollment Dashboard. On this screen, you can see your Daily Digest. The Daily Digest visually outlines how many new tasks you have requested, how many enrollments requiring Provider outreach are ready for status, and how many new approvals and rejections have processed from the previous day. The Dashboard defaults your view to include all accounts you have access to. For most users this will be a single account.



The screenshot shows the Inovalon Enrollment Portal Dashboard. At the top, there is a navigation bar with 'Dashboard', 'Enrollments', 'Open Tasks', and 'Manage' buttons. Below the navigation bar, the dashboard is titled 'Dashboard - Your enrollment work at a glance'. The main content area is divided into two sections: 'Daily Digest' and 'Open Enrollments'.

Daily Digest Summary:

Summary Date	New Tasks	Ready for Status - Provider	Newly Approved	Newly Rejected
Jul 10, 2023 Summary	793	39	535	34
Jul 9, 2023 Summary	0	0	14	1
Jul 8, 2023 Summary	0	0	92	0
Jul 7, 2023 Summary	360	16	358	54
Jul 6, 2023 Summary	235	14	241	29
Jul 5, 2023 Summary	35	48	483	79

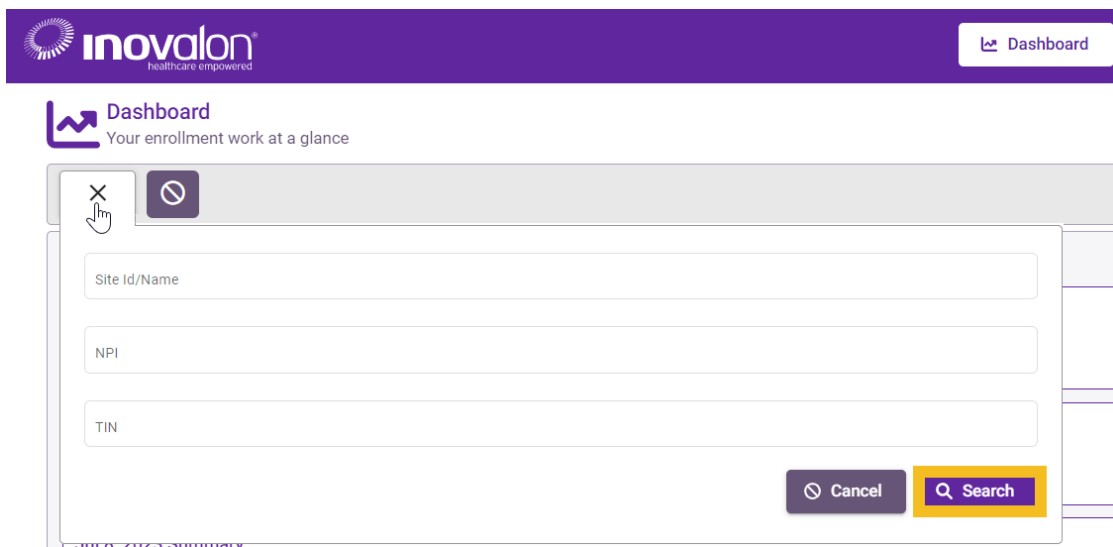
Open Enrollments Summary:

Awaiting Scheduled Date	0
Generation In Progress	731
Provider Open Tasks	13,877
Payer Processing	5,948
Ready for Status	2,903

Completed Enrollments Summary:

Completed Enrollments	12,342
Approved	8,878
Rejected	900
Cancelled	1,847

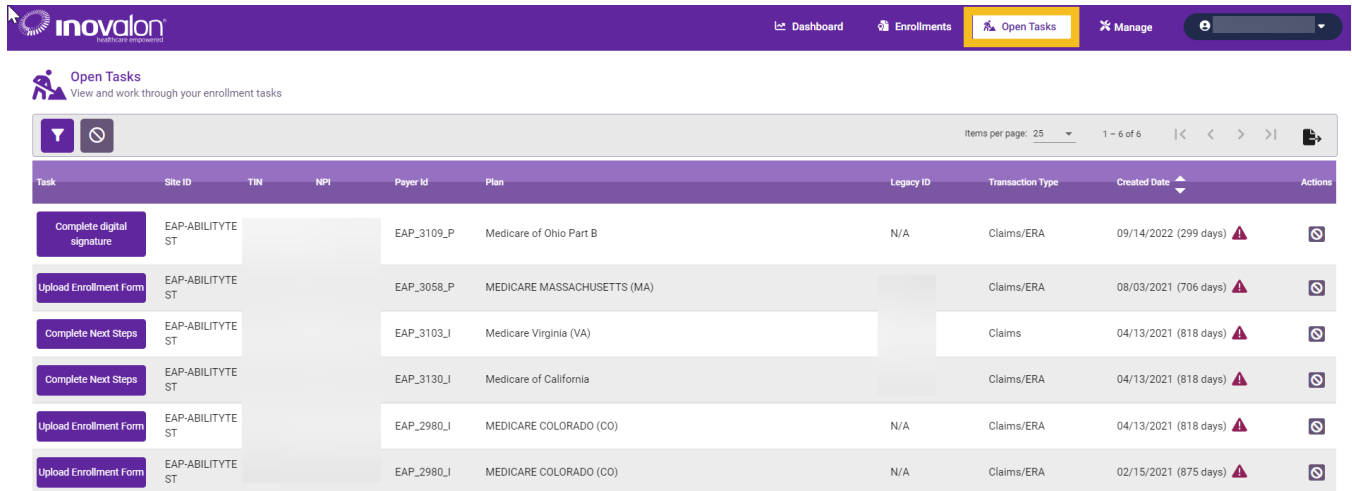
2. For those users who have access to multiple accounts or providers, you can use the purple filter icon located in the upper left side of the dashboard to drill down into those specific accounts. You can search here by name, Site ID, NPI or TIN. Once you have placed a filter on the data and clicked "Search", this filter will be maintained as you navigate to the different areas of the Enrollment Portal.



The screenshot shows the Inovalon Enrollment Portal Dashboard with a search filter overlay. The overlay is a purple box with a white background and a purple border. It contains a search input field with a magnifying glass icon and a 'Search' button. The search input field is labeled 'Site Id/Name'. Below the search input field, there are two more input fields labeled 'NPI' and 'TIN'. At the bottom right of the overlay, there are two buttons: 'Cancel' and 'Search'.

Open Tasks

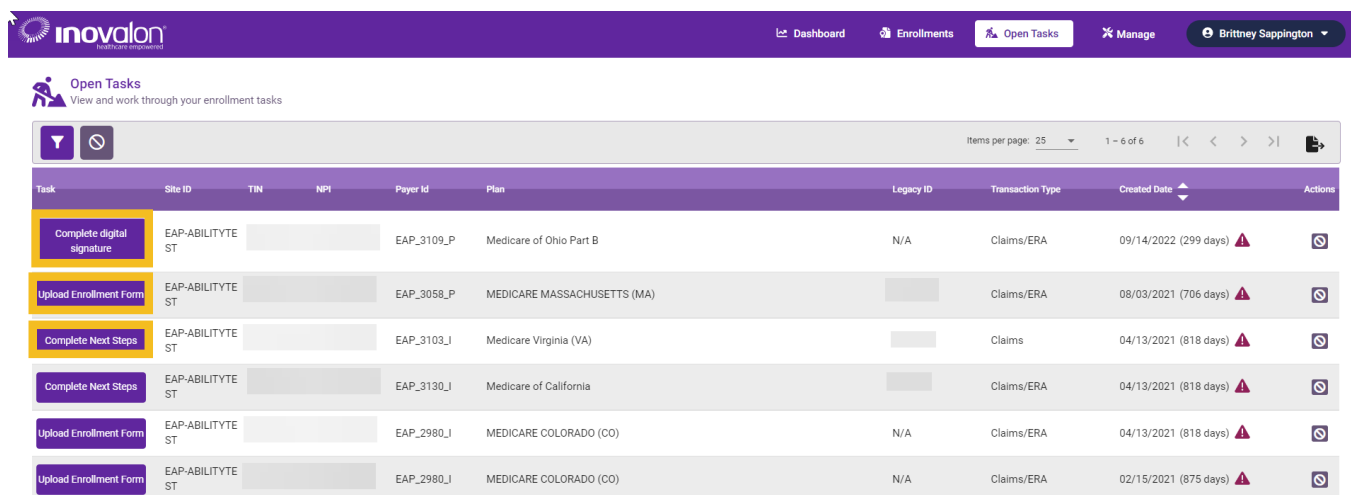
1. The Open Tasks Section aggregates all your pending provider tasks into an easy to navigate list. These requests populate based on the enrollment requests you made within your Inovalon Claims Management system and provide the assigned workflows and steps required by the individual payers to successfully enroll.



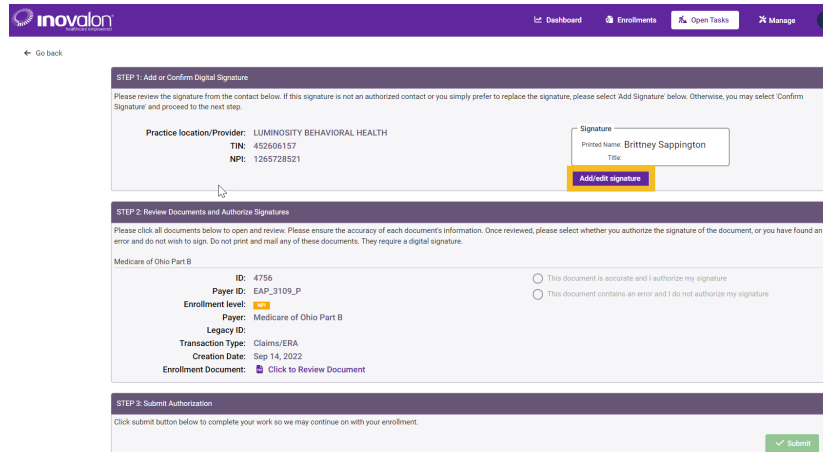
Task	Site ID	TIN	NPI	Payer Id	Plan	Legacy ID	Transaction Type	Created Date	Actions
Complete digital signature	EAP-ABILITYTE ST			EAP_3109_P	Medicare of Ohio Part B	N/A	Claims/ERA	09/14/2022 (299 days)	
Upload Enrollment Form	EAP-ABILITYTE ST			EAP_3058_P	MEDICARE MASSACHUSETTS (MA)		Claims/ERA	08/03/2021 (706 days)	
Complete Next Steps	EAP-ABILITYTE ST			EAP_3103_I	Medicare Virginia (VA)		Claims	04/13/2021 (818 days)	
Complete Next Steps	EAP-ABILITYTE ST			EAP_3130_I	Medicare of California		Claims/ERA	04/13/2021 (818 days)	
Upload Enrollment Form	EAP-ABILITYTE ST			EAP_2980_I	MEDICARE COLORADO (CO)	N/A	Claims/ERA	04/13/2021 (818 days)	
Upload Enrollment Form	EAP-ABILITYTE ST			EAP_2980_I	MEDICARE COLORADO (CO)	N/A	Claims/ERA	02/15/2021 (875 days)	

2. Any enrollments that require provider action will be listed in the **Open Tasks** section. You'll notice each task is specific to the payer, transaction type and NPI/Tax ID requested. From this view, you will be able to review each enrollment task to complete digital signatures, review payer portal instructions, and download forms that require physical signatures.

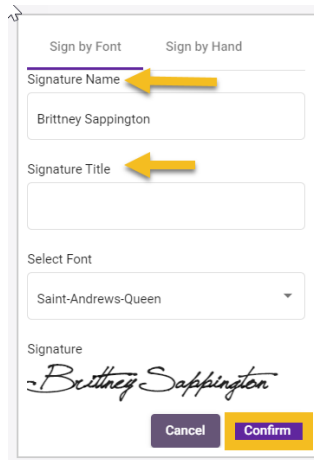
Enrollment Task Types



Task	Site ID	TIN	NPI	Payer Id	Plan	Legacy ID	Transaction Type	Created Date	Actions
Complete digital signature	EAP-ABILITYTE ST			EAP_3109_P	Medicare of Ohio Part B	N/A	Claims/ERA	09/14/2022 (299 days)	
Upload Enrollment Form	EAP-ABILITYTE ST			EAP_3058_P	MEDICARE MASSACHUSETTS (MA)		Claims/ERA	08/03/2021 (706 days)	
Complete Next Steps	EAP-ABILITYTE ST			EAP_3103_I	Medicare Virginia (VA)		Claims	04/13/2021 (818 days)	
Complete Next Steps	EAP-ABILITYTE ST			EAP_3130_I	Medicare of California		Claims/ERA	04/13/2021 (818 days)	
Upload Enrollment Form	EAP-ABILITYTE ST			EAP_2980_I	MEDICARE COLORADO (CO)	N/A	Claims/ERA	04/13/2021 (818 days)	
Upload Enrollment Form	EAP-ABILITYTE ST			EAP_2980_I	MEDICARE COLORADO (CO)	N/A	Claims/ERA	02/15/2021 (875 days)	



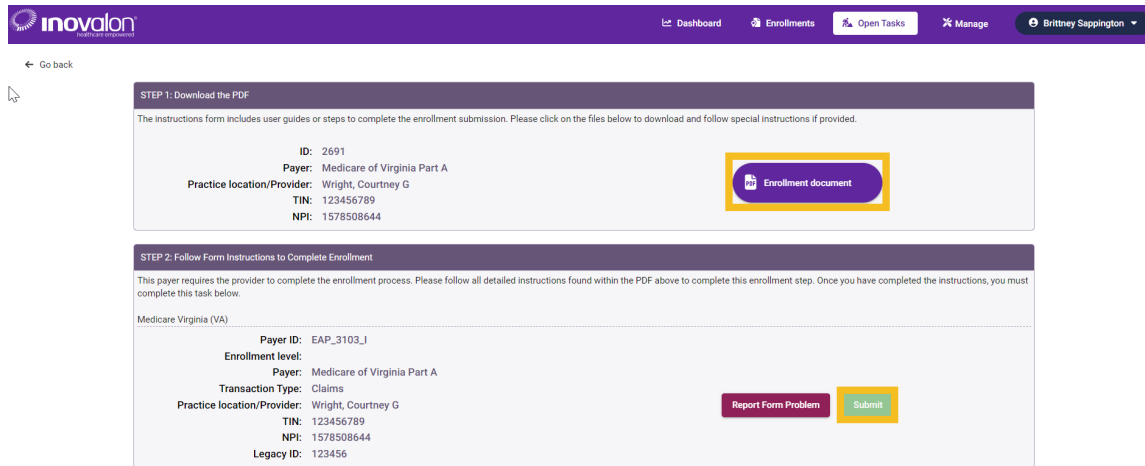
- a. Some payers allow for their enrollment paperwork to be signed electronically. If you have chosen an enrollment that requires a digital signature, please follow the step-by-step directions on their screen.
 - i. Click the Add/edit signature button
 - ii. Enter in the Signature Name, Signature Title and select the font you wish to use OR select Sign by Hand.
 1. Once completed, click Confirm.



- iii. The person signing the form must be authorized to do so to avoid rejections from the payer.
- iv. **You are required to open and review the document before you can move forward.**
- v. If the document contains an error, you will receive a text box where you will further describe the issue. This will cancel the enrollment and create a ticket for Madaket Health to review. Once the issue is corrected, the task will appear back in your work queue for completion.

Note: After a task is completed, you will be directed back to the rest of your tasks.

Complete Next Steps – Online Payer Portal Enrollment



← Go back

STEP 1: Download the PDF

The instructions form includes user guides or steps to complete the enrollment submission. Please click on the files below to download and follow special instructions if provided.

ID: 2691
Payer: Medicare of Virginia Part A
Practice location/Provider: Wright, Courtney G
TIN: 123456789
NPI: 1578508644

Enrollment document

STEP 2: Follow Form Instructions to Complete Enrollment

This payer requires the provider to complete the enrollment process. Please follow all detailed instructions found within the PDF above to complete this enrollment step. Once you have completed the instructions, you must complete this task below.

Medicare Virginia (VA)

Payer ID: EAP_3103_I
Enrollment level:
Payer: Medicare of Virginia Part A
Transaction Type: Claims
Practice location/Provider: Wright, Courtney G
TIN: 123456789
NPI: 1578508644
Legacy ID: 123456

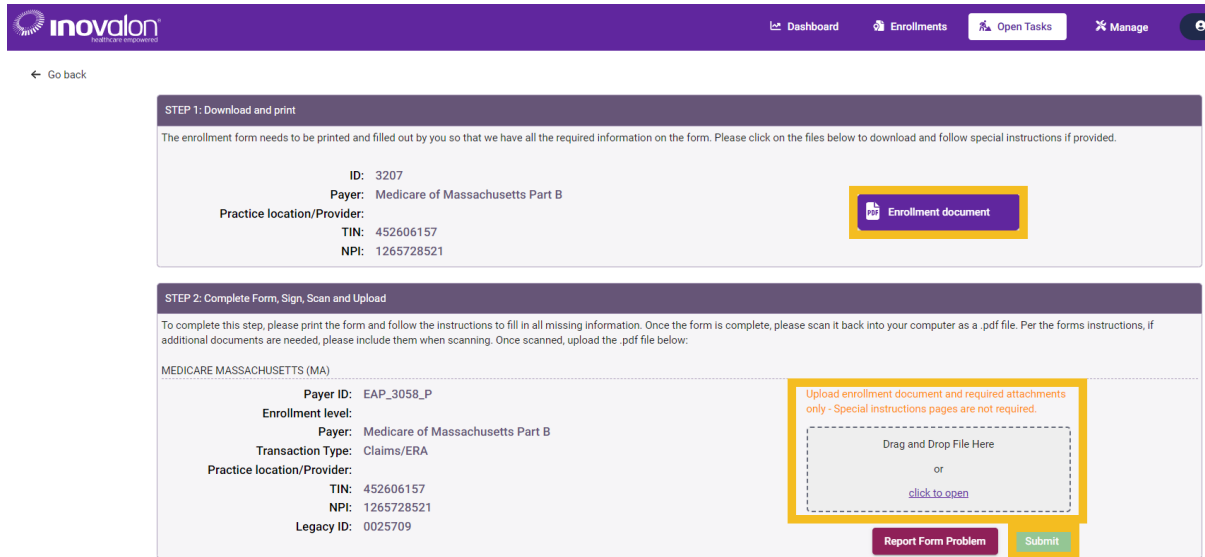
Report Form Problem Submit

- b. Some payers require you to complete enrollment steps on their dedicated system. If you chose one of these payers, you will be prompted to follow the step-by-step instructions on your screen.
- c. Start by clicking the Enrollment document button to download the instructions.
- d. Navigate to the appropriate website/portal and complete the steps.
- e. Once you have completed the enrollment process on the payer’s portal, navigate back to this enrollment record and click the green “Submit” button.

You are required to open and review the document before you can submit the request.

- f. Notes:
 - i. If you notice an error on the form, choose **Report Form Problem**. This will cancel the enrollment and create a ticket for Madaket to review. Once the issue is corrected, a task will appear back in your work queue for completion.
 - ii. You will also have the option to enter a **Packet ID** if supplied by the payer.

2. Upload Enrollment Form - Physical Signature May Be Required



The screenshot shows the Inovalon Medicare enrollment interface. At the top, there is a navigation bar with 'Dashboard', 'Enrollments', 'Open Tasks', and 'Manage' buttons. Below the navigation bar, there is a 'Go back' link.

STEP 1: Download and print
 The enrollment form needs to be printed and filled out by you so that we have all the required information on the form. Please click on the files below to download and follow special instructions if provided.

ID: 3207
 Payer: Medicare of Massachusetts Part B
 Practice location/Provider:
 TIN: 452606157
 NPI: 1265728521

Enrollment document

STEP 2: Complete Form, Sign, Scan and Upload
 To complete this step, please print the form and follow the instructions to fill in all missing information. Once the form is complete, please scan it back into your computer as a .pdf file. Per the forms instructions, if additional documents are needed, please include them when scanning. Once scanned, upload the .pdf file below:

MEDICARE MASSACHUSETTS (MA)
 Payer ID: EAP_3058_P
 Enrollment level:
 Payer: Medicare of Massachusetts Part B
 Transaction Type: Claims/ERA
 Practice location/Provider:
 TIN: 452606157
 NPI: 1265728521
 Legacy ID: 0025709

Upload enrollment document and required attachments only - Special instructions pages are not required.

Drag and Drop File Here
 or
[click to open](#)

Report Form Problem Submit

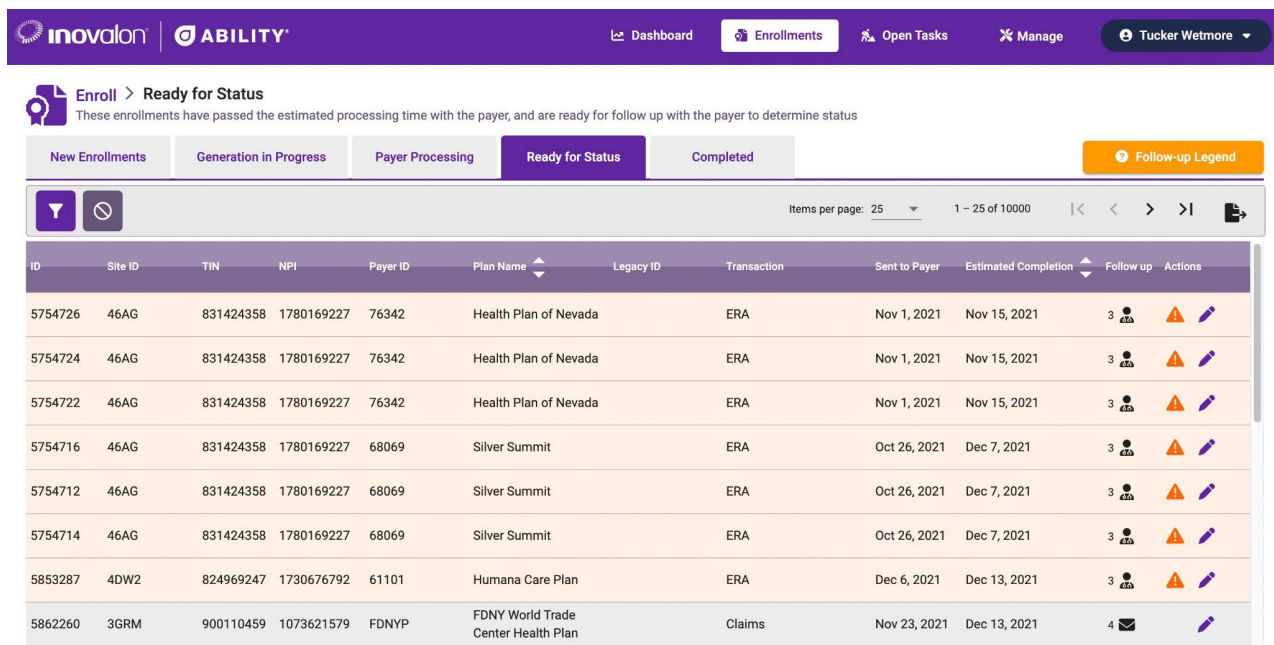
- a. Some payers require their enrollment forms to have a physical signature. These tasks look like online enrollments, but the PDF may require you to download, print, sign and upload the form back into the system.

You are required to open and review the document before you can submit the request.

Note: It is important that you follow these instructions carefully. Some mailed forms will need to be signed and sent by mail. The instructions will notify you where the forms need to be mailed.

Enrollments Section

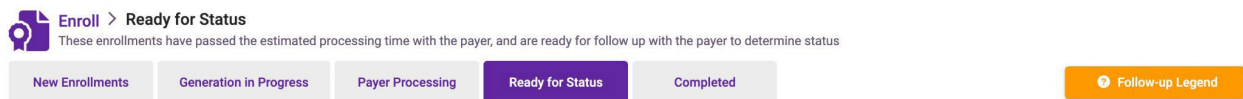
1. Enrollments is where you view, track and manage your enrollments. In order to access Enrollments, you'll need to click on the Enrollments button on the top banner of the screen. By default you'll be able to see all of the data you have access to. In Enrollments, there are four tabs, 'Generation in Progress', 'Payer Processing', 'Ready for Status', & 'Completed'
 - a. Generation In Progress, meaning enrollments that are currently being processed by the system and no current action is required by you;
 - b. Payer Processing tab shows any enrollments that have been submitted to the payer, but that have not reached their estimated processing time and are still under review.
 - c. Ready for Status which include enrollments that have made it through the defined Payer Processing time and are ready for payer outreach for final status;




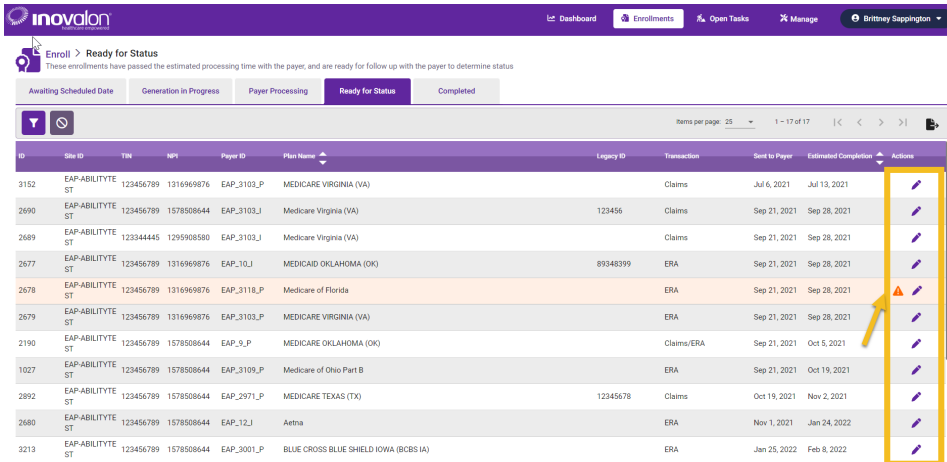
ID	Site ID	TIN	NPI	Payer ID	Plan Name	Legacy ID	Transaction	Sent to Payer	Estimated Completion	Follow up	Actions
5754726	46AG	831424358	1780169227	76342	Health Plan of Nevada		ERA	Nov 1, 2021	Nov 15, 2021	3	
5754724	46AG	831424358	1780169227	76342	Health Plan of Nevada		ERA	Nov 1, 2021	Nov 15, 2021	3	
5754722	46AG	831424358	1780169227	76342	Health Plan of Nevada		ERA	Nov 1, 2021	Nov 15, 2021	3	
5754716	46AG	831424358	1780169227	68069	Silver Summit		ERA	Oct 26, 2021	Dec 7, 2021	3	
5754712	46AG	831424358	1780169227	68069	Silver Summit		ERA	Oct 26, 2021	Dec 7, 2021	3	
5754714	46AG	831424358	1780169227	68069	Silver Summit		ERA	Oct 26, 2021	Dec 7, 2021	3	
5853287	4DW2	824969247	1730676792	61101	Humana Care Plan		ERA	Dec 6, 2021	Dec 13, 2021	3	
5862260	3GRM	900110459	1073621579	FDNYP	FDNY World Trade Center Health Plan		Claims	Nov 23, 2021	Dec 13, 2021	4	












Ready for Status Enrollments

1. When you enter the Enrollments section, you will land on the Ready for Status Enrollments tab by default. The enrollments shown here have passed their estimated processing time with the payer and are ready for follow up.




1. Self-service functionality in the Ready for Status Enrollments tab allows you, the user, to approve, reject or cancel enrollments based on information you receive from the payer.
2. Orange exclamation marks () indicate that an enrollment is SPP (Status by Partner or Provider only).
3. To act on an enrollment, click on the pencil icon in the Actions column. You'll then be able to Approve, Reject, change the follow up date, or cancel the enrollment. You'll also see follow up notes, and the contact information here.



ID	Site ID	TIN	NPI	Payer ID	Plan Name	Legacy ID	Transaction	Sent to Payer	Estimated Completion	Actions
3152	EAP-ABILITYTE ST	123456789	1316969876	EAP_3103_P	MEDICARE VIRGINIA (VA)		Claims	Jul 6, 2021	Jul 13, 2021	
2690	EAP-ABILITYTE ST	123456789	1578508644	EAP_3103_J	Medicare Virginia (VA)	123456	Claims	Sep 21, 2021	Sep 28, 2021	
2689	EAP-ABILITYTE ST	123444445	1295908580	EAP_3103_J	Medicare Virginia (VA)		Claims	Sep 21, 2021	Sep 28, 2021	
2677	EAP-ABILITYTE ST	123456789	1316969876	EAP_3103_J	MEDICAID OKLAHOMA (OK)	89348399	ERA	Sep 21, 2021	Sep 28, 2021	
2678	EAP-ABILITYTE ST	123456789	1316969876	EAP_3118_P	Medicare of Florida		ERA	Sep 21, 2021	Sep 28, 2021	
2679	EAP-ABILITYTE ST	123456789	1316969876	EAP_3103_P	MEDICARE VIRGINIA (VA)		ERA	Sep 21, 2021	Sep 28, 2021	
2190	EAP-ABILITYTE ST	123456789	1578508644	EAP_9_P	MEDICARE OKLAHOMA (OK)		Claims/ERA	Sep 21, 2021	Oct 5, 2021	
1027	EAP-ABILITYTE ST	123456789	1578508644	EAP_3109_P	Medicare of Ohio Part B		ERA	Sep 21, 2021	Oct 19, 2021	
2892	EAP-ABILITYTE ST	123456789	1578508644	EAP_2971_P	MEDICARE TEXAS (TX)	12345678	Claims	Oct 19, 2021	Nov 2, 2021	
2680	EAP-ABILITYTE ST	123456789	1578508644	EAP_12_J	Aetna		ERA	Nov 1, 2021	Jan 24, 2022	
3213	EAP-ABILITYTE ST	123456789	1578508644	EAP_3001_P	BLUE CROSS BLUE SHIELD IOWA (BCBS IA)		ERA	Jan 25, 2022	Feb 8, 2022	

4. Canceling an enrollment here will only cancel the enrollment within Enrollment Portal. At this point in the process, the enrollment has already been sent to the payer, and we cannot stop it from processing on the payer's end.

Enrollment #5473787 ✕

NPI 1710143854
TIN 541819555
Site ID EAP_5345
Plan Name COMPANION LIFE INSURANCE COMPANY
Payer ID EAP_4949_P
Enrollment File  PDF

User payer follow up latest notes

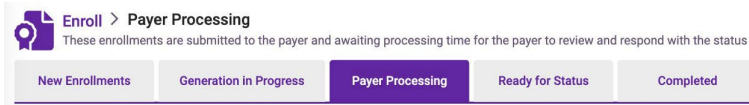
No updates

Default payer follow-up attempts

Followed up 9 times via email as of Jun 28, 2022 and still awaiting payer update.

Contact Information
Companionenrollment@companionlife.net

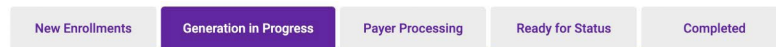
Payer Processing Enrollments



The screenshot shows a navigation bar with five tabs: "New Enrollments", "Generation in Progress", "Payer Processing", "Ready for Status", and "Completed". The "Payer Processing" tab is currently selected and highlighted in purple. Above the tabs, there is a header area with a document icon, the text "Enroll > Payer Processing", and a sub-header: "These enrollments are submitted to the payer and awaiting processing time for the payer to review and respond with the status".

The Payer Processing Enrollments tab shows any enrollments that have been submitted to the payer, but that have not reached their estimated processing time and are still being reviewed by the payer. Enrollments are listed in order of estimated completion date, from oldest to newest. You can act on enrollments in the Payer Processing tab by clicking on the pencil icon in the Actions column.


Generation in Progress



The screenshot shows a navigation bar with five tabs: "New Enrollments", "Generation in Progress", "Payer Processing", "Ready for Status", and "Completed". The "Generation in Progress" tab is currently selected and highlighted in purple.

The Generation in Progress tab contains enrollments that are currently being processed by Madaket. No action is required by the user at this point in the enrollment process. Enrollments are shown in order of start date.


Completed Enrollments

 **Enroll > Completed**
 These enrollments have been marked completed with status from the payer or because they were cancelled or rejected by the users



New Enrollments
Generation in Progress
Payer Processing
Ready for Status
Completed

The Completed Enrollments tab contains enrollments that have been completed or closed. Enrollments are listed in order of completion date, with more recently completed enrollments listed first.

1. Approved – Enrollment has been approved by the payer.
2. Rejected – Enrollment has been rejected by the payer.
3. Canceled – Enrollment has been canceled due to it no longer being needed.

 **Enroll > Completed**
 These enrollments have been marked completed with status from the payer or because they were cancelled or rejected by the users

New Enrollments
Generation in Progress
Payer Processing
Ready for Status
Completed



Items per page: 25 1 – 25 of 10000 < > >> <<

ID	Site ID	TIN	NPI	Payer ID	Plan Name	Legacy ID	Transaction	Start Date	End Date	Resolution State	Notes
6470581	EAP_30845	620850498	1164455549	EAP_3457_J	CLOVER HEALTH		ERA	May 18, 2022	Jun 28, 2022	Approved	
6471866	EAP_31011	620850498	1699708073	EAP_6541_J	First Choice VIP Care Plus - SC		ERA	May 18, 2022	Jun 28, 2022	Approved	
6470738	EAP_30842	620850498	1083647465	EAP_117_I	Alliant Health Plans of Georgia		ERA	May 18, 2022	Jun 28, 2022	Approved	
6471721	EAP_31005	620850498	1215960794	EAP_3457_J	CLOVER HEALTH		ERA	May 18, 2022	Jun 28, 2022	Approved	

Notes:

If an enrollment was rejected, you will see notes that show the reason for the rejection. The necessary adjustments will need to be made before enrollment can be resubmitted.

Exporting Enrollment Data

1. Within Inovalon Claims Management → Settings → Inovalon Enrollment → View Status screen, you have the option to do a full export of your profiled data into a CSV file, which you can import into Microsoft Excel. To do this, you will choose the **Export Wizard** button in the upper right-hand area of the screen.

Claims Management Pro Brittney Sappington | Logout
TFC_System_Operations (ability.demo) [Upload Files](#)

TEST MODE

Home Dashboards Patients Claims Collections Reporting Settings System Training Operations

Enrollment Requests (0) Rows Selected - [Deselect All](#)

Quick Search **Profiler**

Payer Name Status EIN (Tax ID) NPI

Ignore Profiler Filters

External Site ID	External Enrollment ID	Partner Alias	Facility Name	EIN (Tax ID)	Facility NPI	Payer Name	Transaction Type	Status	Created Time (UTC)	Payer ID	Updated Time (UTC)	Internal Status	Closed Reason	Legacy Provider ID	Last Activity	Credibility	Payer Follow-Up Date	Action	
<input type="checkbox"/>	EAP_14062	3167646	A1234	DEMO CLINIC	987654321	9875641234	Medicaid Alaska (AK)	Institutional ERA	APPROVED	12/04/19 20:29:06		12/04/19 20:29:32	SENT		123456789	Request auto approved without payer confirmation	Kati Pierce		
<input type="checkbox"/>	EAP_14062	3167605	A1234	DEMO HOSPITAL	987654321	1234567890	Medicaid Alaska (AK)	Institutional ERA	APPROVED	12/04/19 20:29:06		12/04/19 20:29:45	SENT		569874	Request auto approved without payer confirmation	Kati Pierce		
<input type="checkbox"/>	EAP_14062	3167634	A1234	DEMO CLINIC	987654321	9875641234	Cigna	Institutional ERA	APPROVED	12/04/19 20:29:05		12/06/19 22:08:45	SENT			Request approved by payer	Kati Pierce		
<input type="checkbox"/>	EAP_14062	3167635	A1234	DEMO CLINIC	987654321	9875641234	Cigna	Professional ERA	APPROVED	12/04/19 20:29:05		12/06/19 22:08:43	SENT			Request approved by payer	Kati Pierce		

2. When you choose the **Export Wizard** button, a separate dialog box pops up to walk you through the export process. You can choose either a CSV or PDF format for this export.

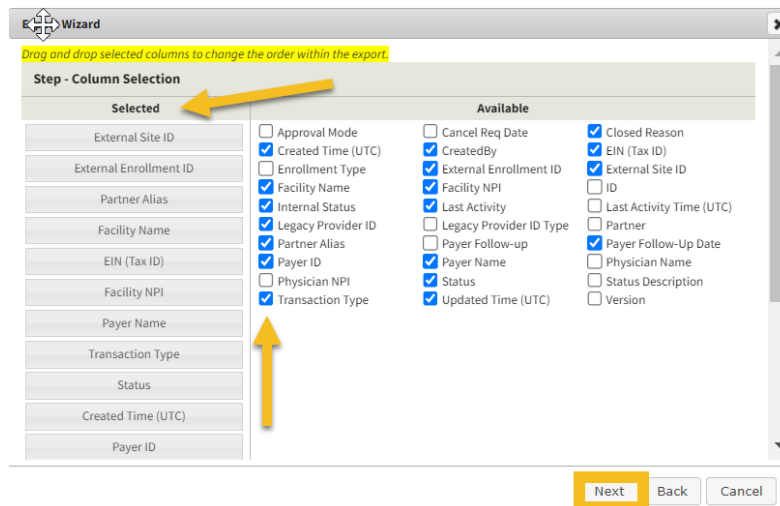
Export Wizard ✕

Step - Format Selection

Format ▼

- CSV
- PDF

- After choosing a file type, select the data you wish to export from the available section by clicking the checkboxes. You can also reorder the columns in your report by changing the order of the data fields on the left under the Selected section. Once you are comfortable with the data being exported, click the **Next** button.



Export Wizard

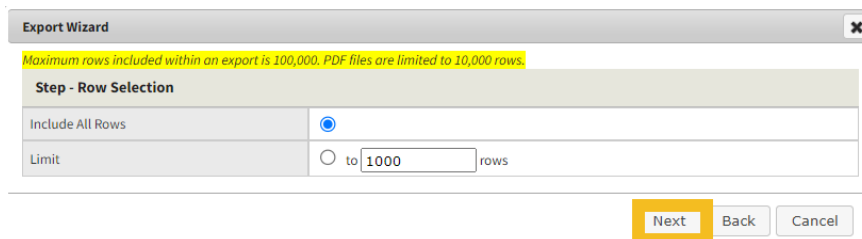
Drag and drop selected columns to change the order within the export.

Step - Column Selection

Selected	Available
External Site ID	<input type="checkbox"/> Approval Mode
External Enrollment ID	<input checked="" type="checkbox"/> Created Time (UTC)
Partner Alias	<input type="checkbox"/> Enrollment Type
Facility Name	<input checked="" type="checkbox"/> Facility Name
EIN (Tax ID)	<input checked="" type="checkbox"/> Internal Status
Facility NPI	<input checked="" type="checkbox"/> Legacy Provider ID
Payer Name	<input checked="" type="checkbox"/> Partner Alias
Transaction Type	<input checked="" type="checkbox"/> Payer ID
Status	<input type="checkbox"/> Physician NPI
Created Time (UTC)	<input checked="" type="checkbox"/> Transaction Type
Payer ID	<input type="checkbox"/> Cancel Req Date
	<input checked="" type="checkbox"/> CreatedBy
	<input checked="" type="checkbox"/> External Enrollment ID
	<input checked="" type="checkbox"/> Facility NPI
	<input checked="" type="checkbox"/> Last Activity
	<input type="checkbox"/> Legacy Provider ID Type
	<input type="checkbox"/> Payer Follow-up
	<input checked="" type="checkbox"/> Payer Name
	<input checked="" type="checkbox"/> Status
	<input checked="" type="checkbox"/> Updated Time (UTC)
	<input checked="" type="checkbox"/> Closed Reason
	<input checked="" type="checkbox"/> EIN (Tax ID)
	<input checked="" type="checkbox"/> External Site ID
	<input type="checkbox"/> ID
	<input type="checkbox"/> Last Activity Time (UTC)
	<input type="checkbox"/> Partner
	<input checked="" type="checkbox"/> Payer Follow-Up Date
	<input type="checkbox"/> Physician Name
	<input type="checkbox"/> Status Description
	<input type="checkbox"/> Version

Next Back Cancel

- Click the **Next** button to include all rows on your profiler.



Export Wizard

Maximum rows included within an export is 100,000. PDF files are limited to 10,000 rows.

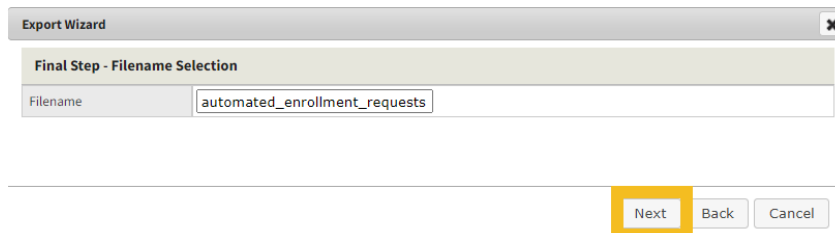
Step - Row Selection

Include All Rows

Limit to 1000 rows

Next Back Cancel

- You can create a custom name for your report or leave it as the defaulted Filename. Once completed, click the **Next** button. Your report is now being generated and will be created as a downloaded file from your Inovalon Claims Management system. You can now review the CSV or PDF file.



Export Wizard

Final Step - Filename Selection

Filename automated_enrollment_requests

Next Back Cancel