

SHARES Provider Manual – I. System Overview

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INTRODUCTION TO THE SHARES PROVIDER PORTAL

SHARES (Shared Health And Recovery Enterprise System) is the software solution for Claims and Member Enrollment produced by software vendor InfoMC. The products that were developed are Incedo Web (for Board processing), Incedo Provider Connect (the Provider portal), and various administrative tools and applications. Collectively, these are referred to as SHARES.

The software that you, the provider, will be using is called Incedo ProviderConnect, also referred to as the SHARES Provider Portal. This is a web-based application that is accessible via Internet Explorer (by versions currently supported by Microsoft.)

Each Provider will have accounts created for their users that are associated with the Provider. User security is in place that disallows access of provider information unless that user is assigned to that provider.

The SHARES Provider Portal helps to improve operational efficiency by allowing providers to communicate with the Board (and vice versa) via a web interface in order to reduce duplicate data entry and limit unnecessary phone and fax communication. The SHARES Provider Portal also allows authorized providers to access eligibility and benefit information, request or check clinical authorizations, submit or check status of claims, and update and submit member enrollments.

LOGGING IN

The web address for the SHARES Provider Portal is <https://ohshareipc.infomc.biz/ipc/>

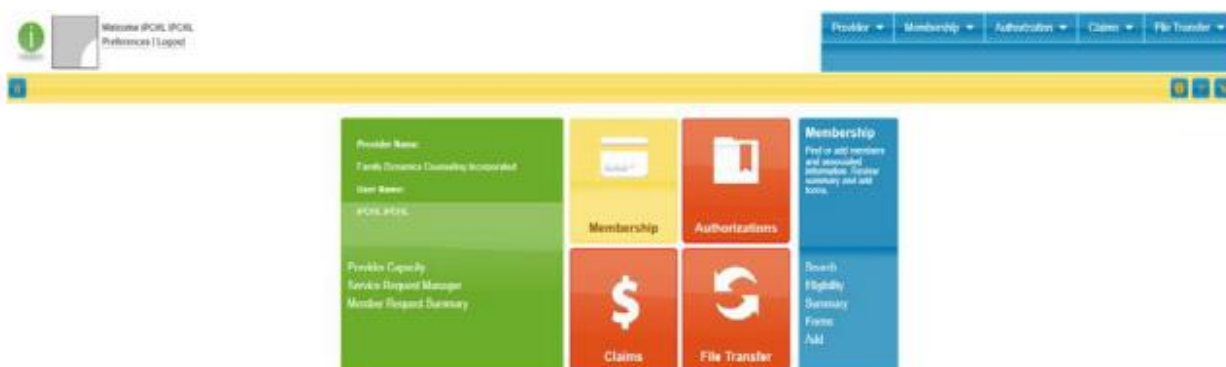
In order to access the SHARES Provider Portal, users are required to enter their Username and Password. A SHARES user account request form is available to request user account adds/removes/or changes. Users will have different functions available to them, based on the privileges that are given, based on role.



The SHARES Provider Portal login screen

HOME PAGE / DASHBOARD

When you log into the SHARES Provider Portal, you are taken to your Dashboard / Home page. Below is an example of the dashboard.

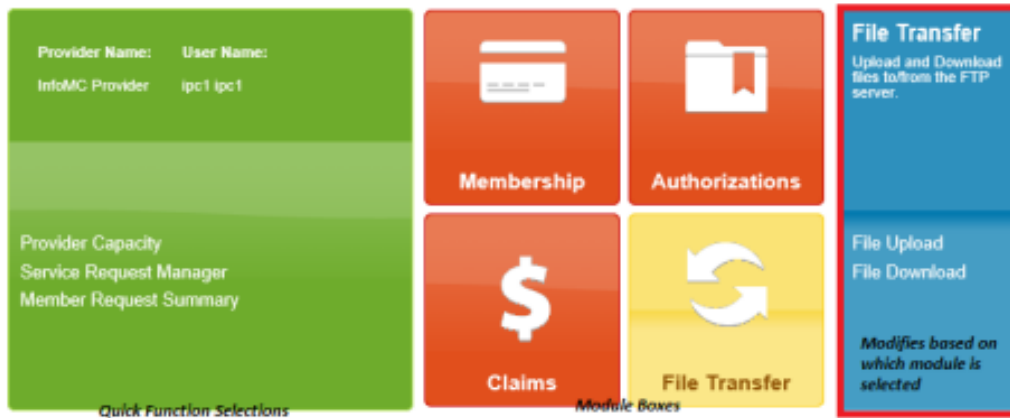


Here you will see the subsystem (modules) and can navigate to any that you have permissions to access from this page.

DASHBOARD NAVIGATION

The center of the dashboard provides you with the subsystem (or modules) that are available for your use in the SHARES Provider Portal. This is a dynamic set of boxes that will alter what you see in the right (blue) box based on what module is selected. For example – if you click on the “Membership” box, the blue box will display what you can expect to do within this module. The available features are listed in the bottom half of the blue box. Once you select another module box, you should see this option change in the blue box accordingly.

The green box on the left provides your information at the top, and “quick selection” options for common features.



MENU BAR ITEMS

There are 4 buttons located on the Menu Bar; [Home](#); [About](#); [Online Help](#), and [Logout](#) (on the far right). These are located at the top portion of the dashboard.



HOME

The **‘Home’** image button will always bring the user back to their “Home Page”.



ABOUT

The **‘About’** button allows you to view product information such as Version # and Build #. This is information you will unlikely need to access, but could potentially be used in troubleshooting.



HELP

The **‘Help’** button provides you with information regarding how to use the product. Note that this is general information about the software, and would mostly be helpful in describing modules and navigation.

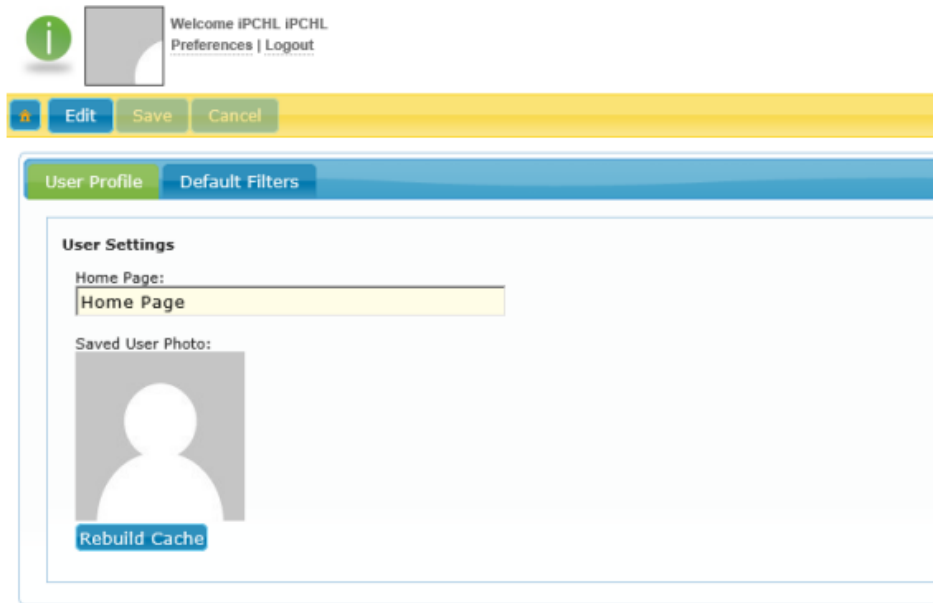


LOGOUT

The **‘Logout’** button allows you to logout of your SHARES Provider Portal session. You can also logout by clicking the “Logout” link under your name, on the left top side of the dashboard.

PREFERENCES

Selecting the “Preferences” link, under your name on the left top side of the dashboard, will bring up the following screen:



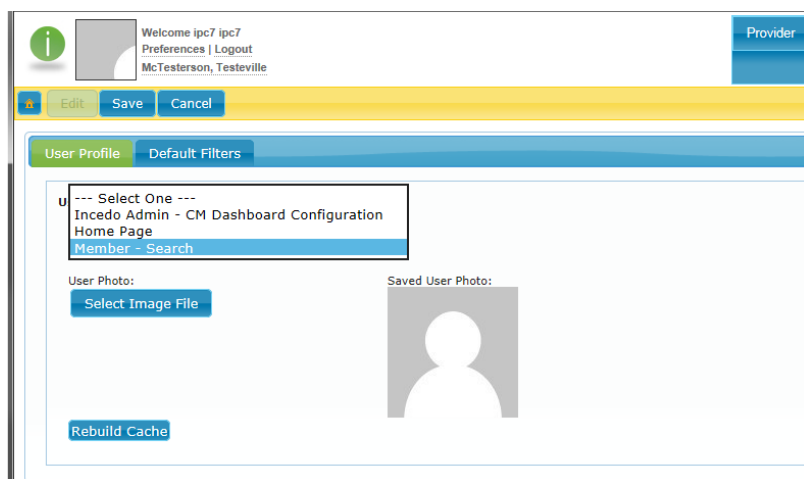
There are two tabs on this screen: User Profile and Default Filters. The functional buttons are: Edit, Save, and Cancel.

USER PROFILE

The **User Settings** available in this tab can be managed by each individual user.

HOME PAGE

The Home Page field allows you to define which page within the SHARES Provider Portal you’d like as your “home page” (this will be the one which you will land whenever clicking on the “**Home**” image button in the menu bar. When in “Edit” mode, you will be able to select from a dropdown the list of the available page options.



REBUILD CACHE

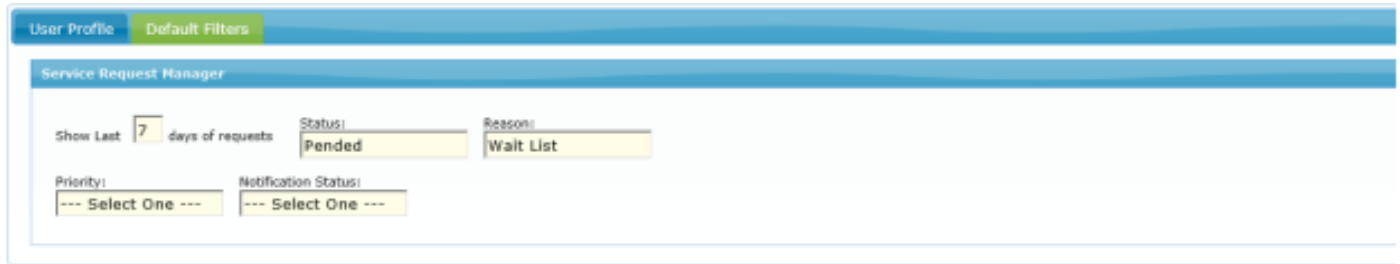
If you click on this button, the cache will be rebuilt and a status box will display.

DEFAULT FILTERS

The options in this tab allow you to define how filters are used for the Service Request Manager..

SERVICE REQUEST MANAGER

The filter options in this section will be used within the Service Request Manager features. Once the user is in “edit mode”, dropdown fields will be enabled. This will allow you to customize your defaults for the results returned. You can always adjust the filter to refine your search results.

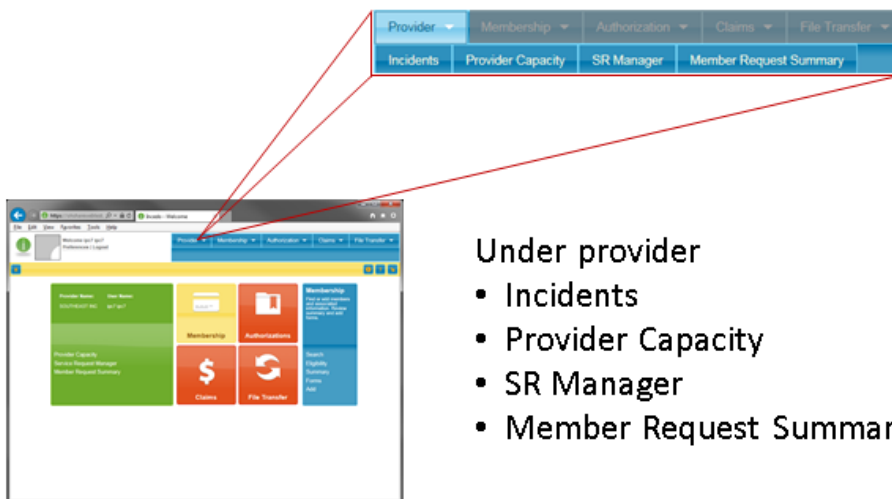


THE SHARES PROVIDER PORTAL SUBSYSTEMS

There are multiple subsystems within The SHARES Provider Portal. What will display ad access is based on your user privileges.



PROVIDER SUBSYSTEM



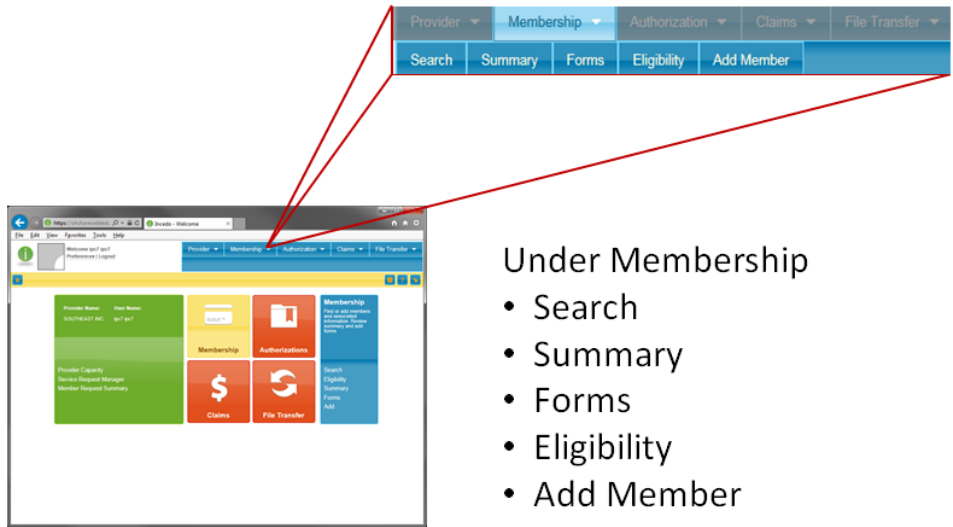
- Under provider
- Incidents
 - Provider Capacity
 - SR Manager
 - Member Request Summary

AREAS OF NOTE:

SR Manager: The SR (or Service Request) Manager is where you would go to look up and manage Service Requests for members through your agency. Service Requests are for services that require authorization and may not apply to all providers.

Member Request Summary: The Member Request Summary is where you would go to check the membership status of a specific member, or all of the membership requests performed by your agency.

MEMBERSHIP SUBSYSTEM



- Under Membership
- Search
 - Summary
 - Forms
 - Eligibility
 - Add Member

AREAS OF NOTE:

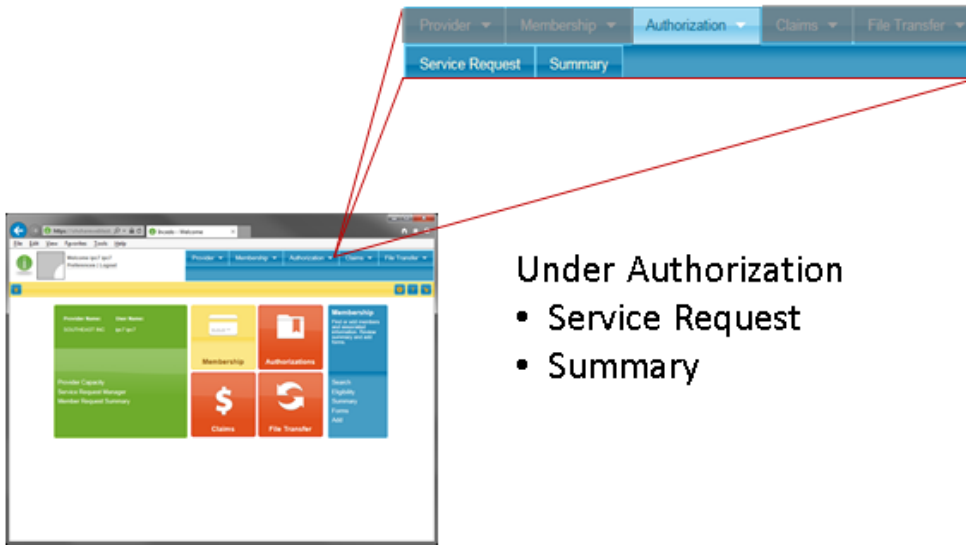
Search: Membership Search will be one of the most frequently used features of the system. Before adding a new member, check the enrollment status, or initiate an update request, you will go to look up the member.

Summary: Once you have a member selected, you can go to Summary to get a quick summary of that member’s information. Items that are underlined are typically links that can be clicked on to get more information.

Forms: If you need to complete a form for a member, you would find all available forms in the Forms module. Here you can add a new form to be attached to the member or access existing forms that are already filled out. ****Note:** If you are not seeing any forms in your search results, be sure to adjust your filters for your search criteria. By default, the system will only return results for the last 2 weeks.

Add Member: The Add Member module is where you will go to add a new member (after you search to make sure they don’t already exist in the system). When you add a member, you will fill out the basic information. Once you save that, the “SHARES Eligibility and Enrollment Request” form will open with additional information to complete.

AUTHORIZATION SUBSYSTEM



Under Authorization

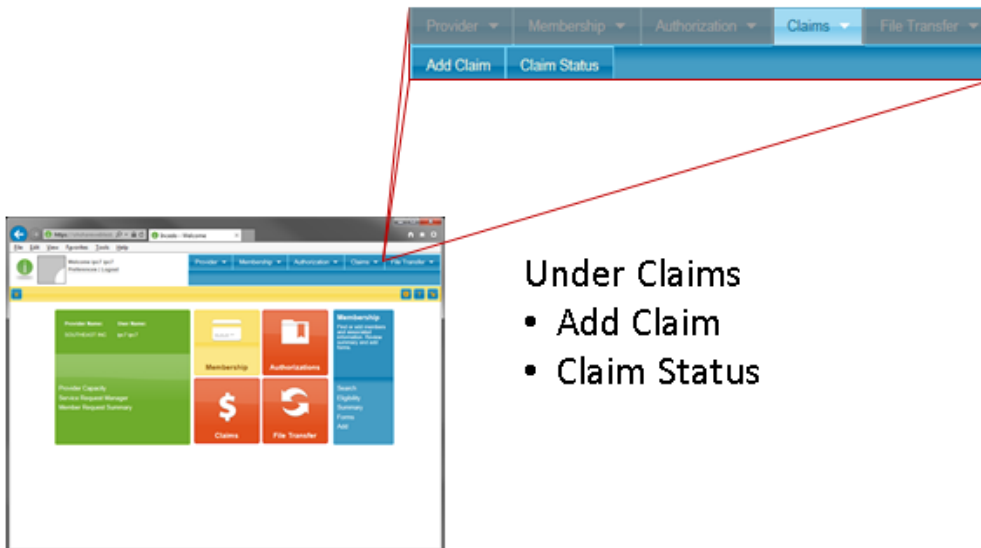
- Service Request
- Summary

AREAS OF NOTE:

Service Request: If you are providing a service that requires a Service Request, this is where you'd go to initiate that. This may not apply to all providers.

Summary: The Summary is where you would go to check the status of Service Requests of a specific member performed by your agency

CLAIMS SUBSYSTEM



Under Claims

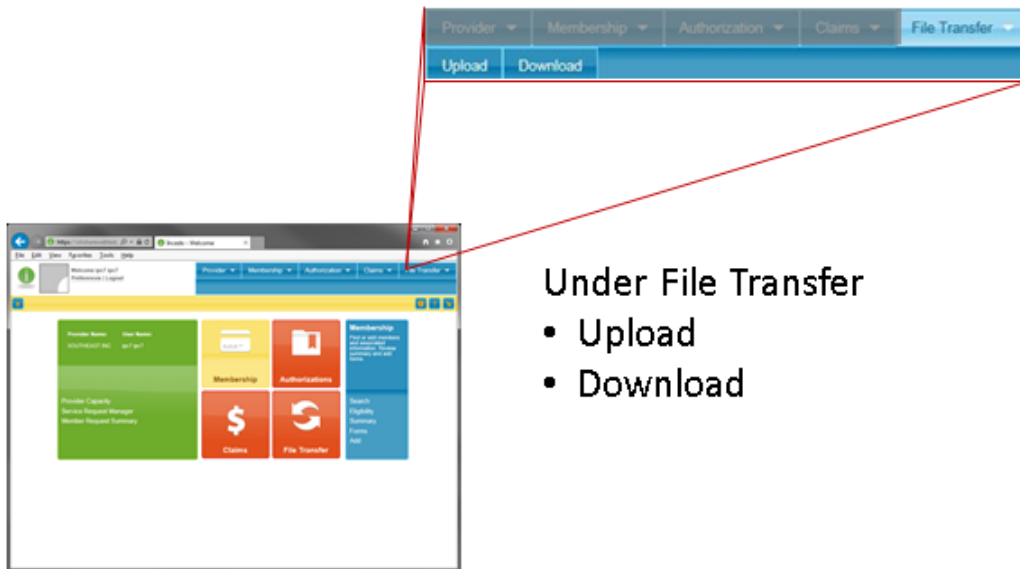
- Add Claim
- Claim Status

AREAS OF NOTE:

Add Claim: Here you can add a simple claim via the SHARES Provider Portal.

Claim Status: Here you can check the status of a claim, regardless of whether it was submitted through the SHARES Provider Portal or via batch upload.

FILE TRANSFER SUBSYSTEM



Under File Transfer

- Upload
- Download

AREAS OF NOTE:

Upload: Here is where you can upload various files, such as 837 claims files, Outcomes files, etc.

Download: If there are files made available to you by the Board, this is where you'd go to download them.

A WORD ON FILTERS:

For all of these menus, you can use the search filter to fine tune your results to find the information you are looking for. If you are not finding what you're looking for, you can reset the filter criteria to start back at the defaults.

Some filters will show only the last 2 weeks of information by default, be sure to check that the date search criteria.