Affiliate Portal User Guide

HealthAdvocate℠

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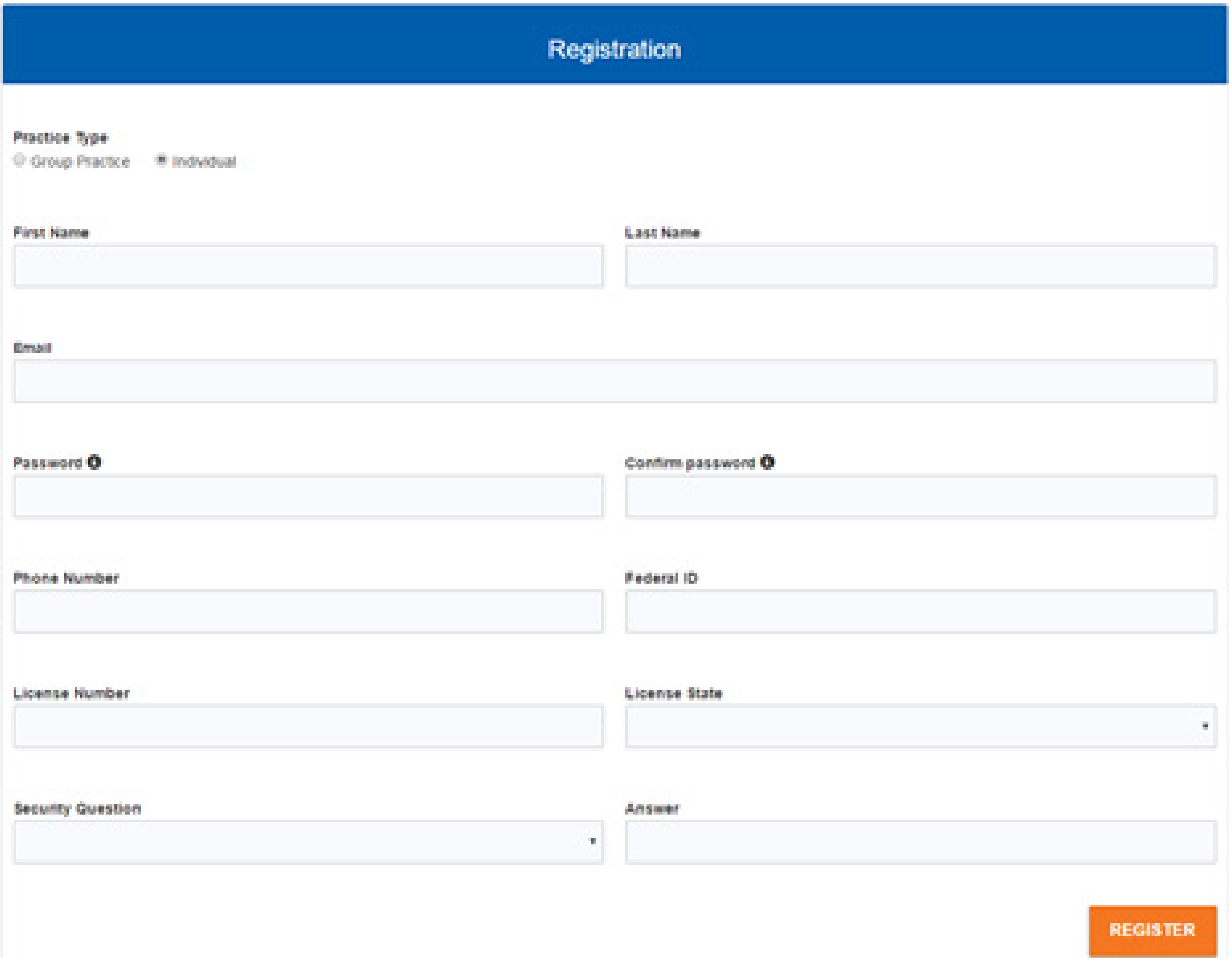
HealthAdvocate℠

AffiliateConnect Registration

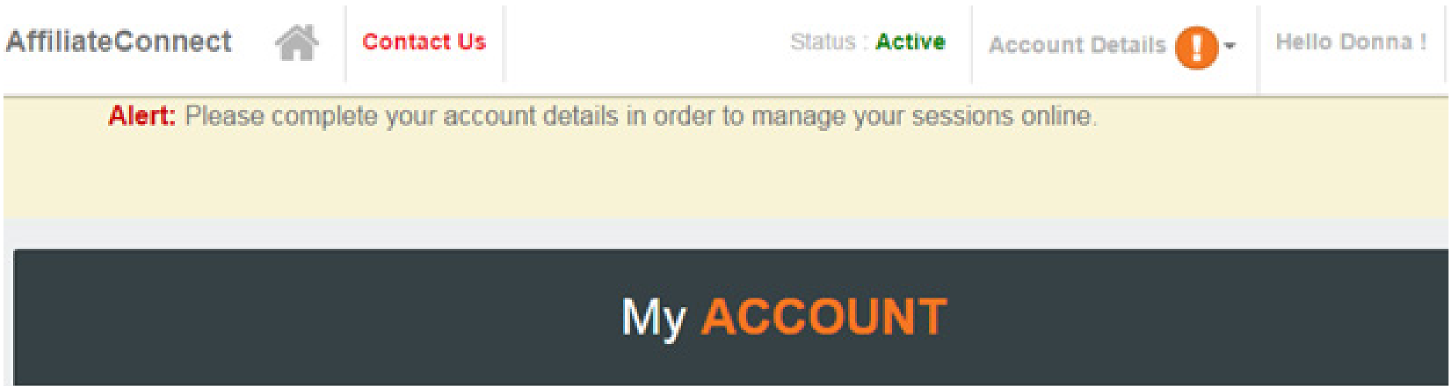
Complete the Registration page and create your user name and password.



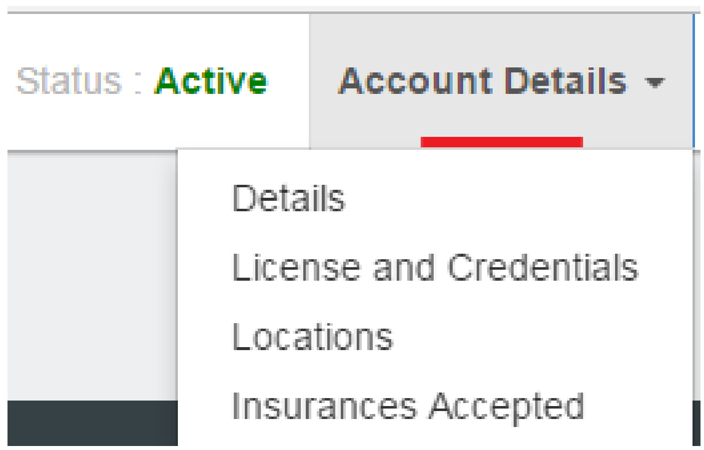
After completing the registration process, you will receive an email from Health Advocate. Click on the registration link within the email to confirm your email address and then you will be able to log in to AffiliateConnect. You will not be able to log in to the portal until you verify your email address.

Account Details – Overview

Once you are logged in, go to "Account Details" located on the top right hand side of the home page.



Click on the Account Details drop-down menu arrow to see the four main sections of your account and click on the section to access it.



To receive new cases and manage your cases through the portal, all four sections need to be completed and your license and liability coverage must be current.

The following tools will display as needed to assist you in using AffiliateConnect:

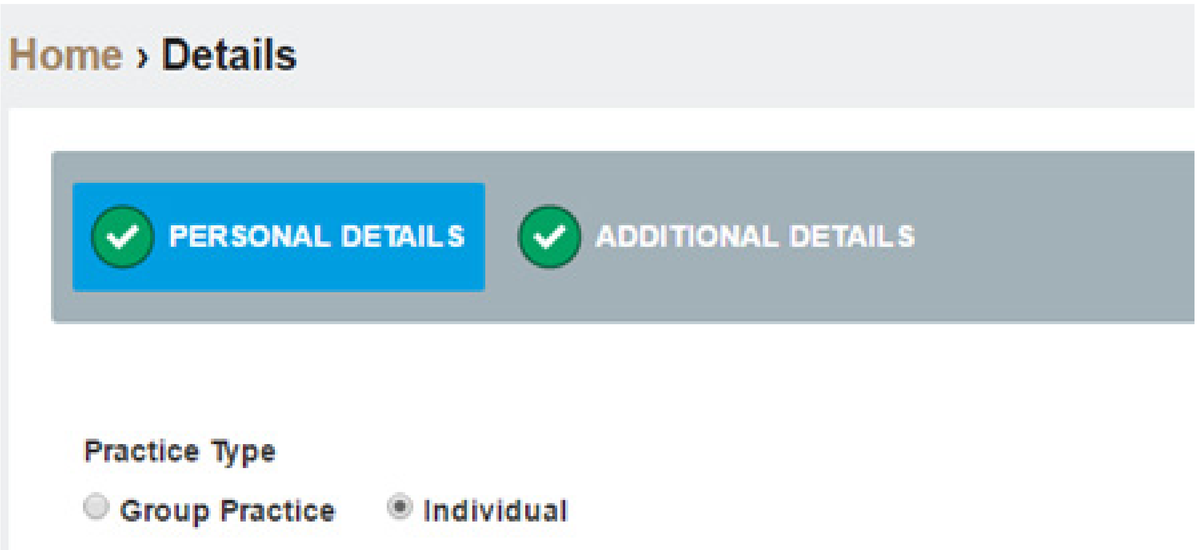
- A green check mark adjacent to an item indicates that the item/section is complete.
- An orange exclamation point adjacent to an item indicates that information is missing.
- A Required Information Message will appear if you hit the "Save" button and a required field is blank. You will need to provide the information to save the page.
- Hover over Tool Tips to learn more about the item or what you need to do.

Account Details - Details Section

The **Details Section** includes **Personal** and **Additional Details** pages to capture your professional and demographic information.

Practice Type

When reviewing and updating your **Personal Details**, you will need to make sure your practice type is accurate. Select **Individual** if you are a sole practitioner.

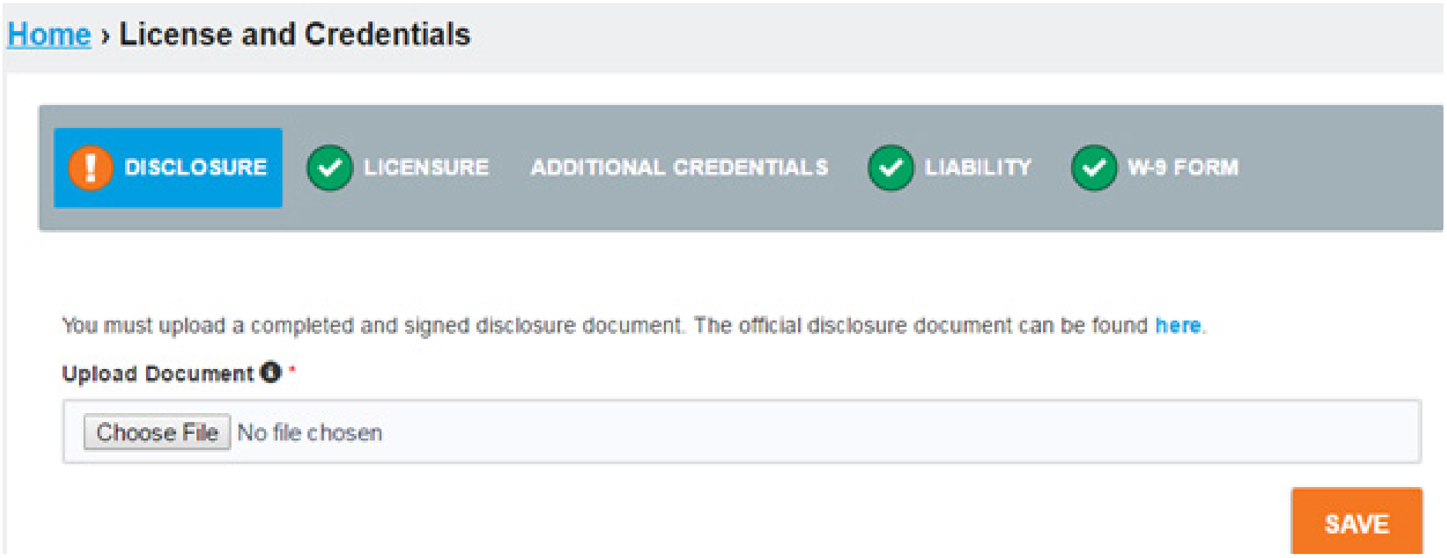


A Group Practice should be checked if you manage affiliates within a group. This option provides additional features and functionality to add members and their **Account Details** as well as administratively manage members' cases. Reference **Group Admin** topics within this guide for more details.

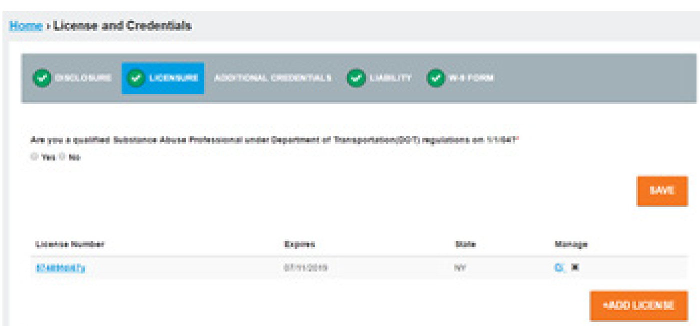
Check all roles that apply, as users can have more than one role.

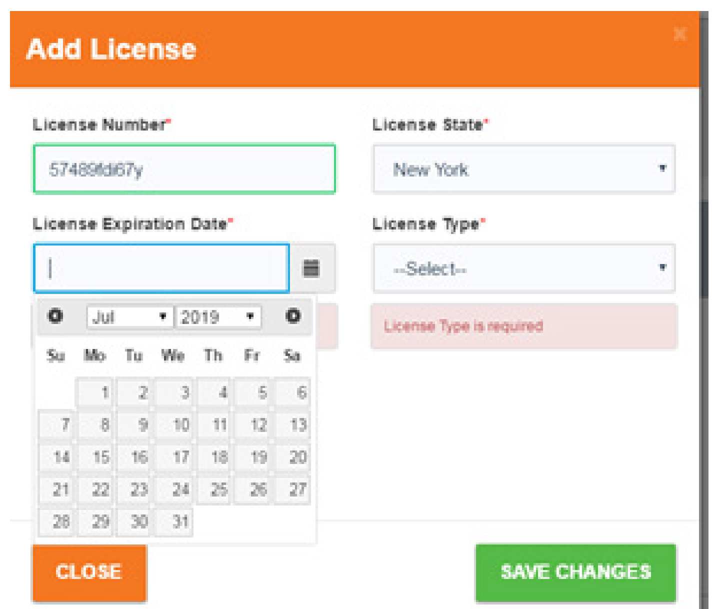
Action Details - License & Credentials

The **License & Credentials Section** includes Disclosure, Credentials, Licensure, Liability and W-9 Form pages. You can enter and delete information as well as download, print, upload and remove applicable documents in this section.



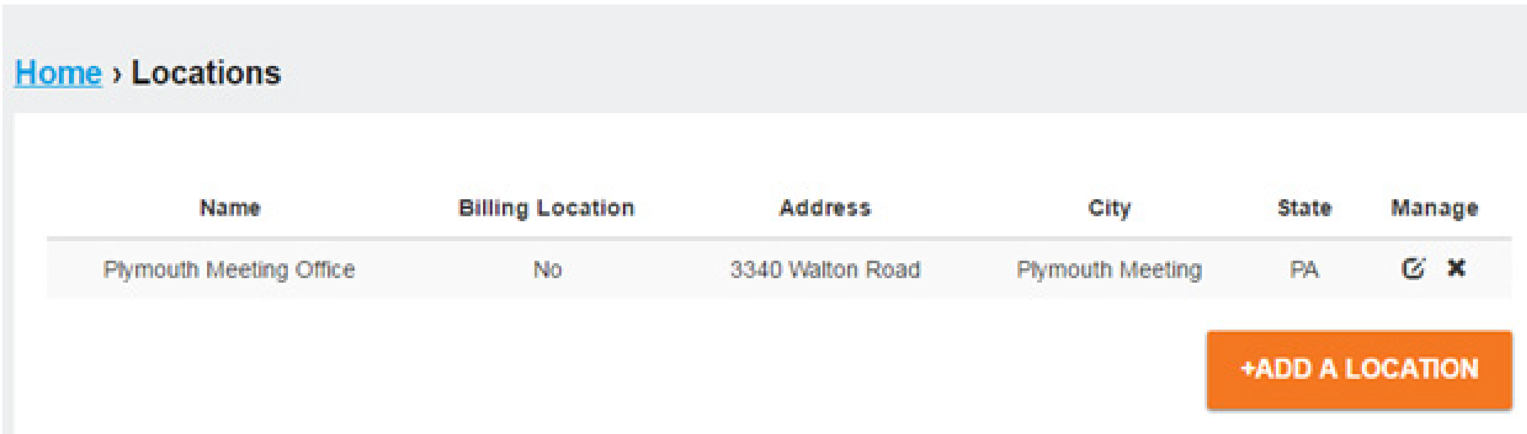
- A green check mark adjacent to each License/Credential indicates that the information is complete and current.
- An orange exclamation point adjacent to each License/Credential indicates that information is missing.
- There are pop-up windows throughout this section to guide you to add required information. For example, on the Licensure page, you can see the existing license information and when clicking on **+ADD LICENSE** a pop-up window appears to display what information is needed.



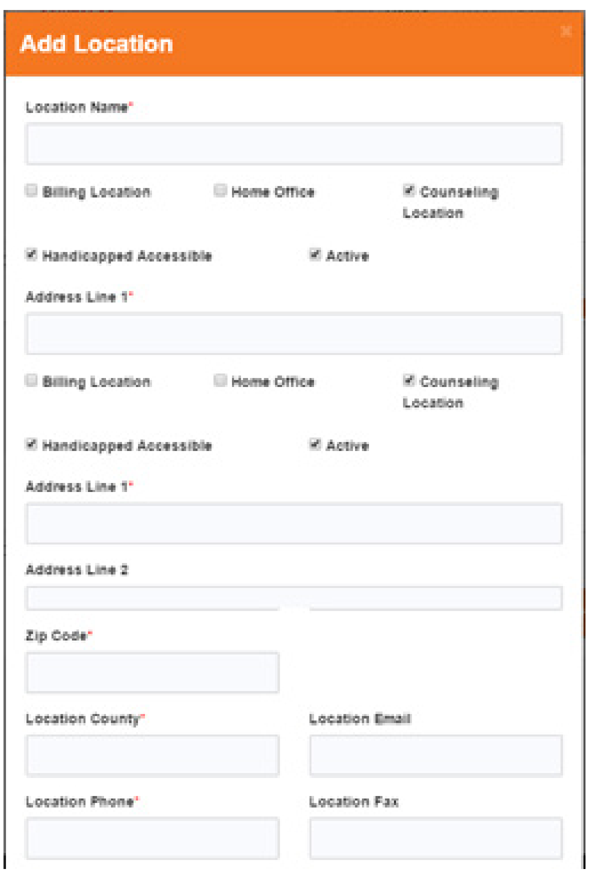


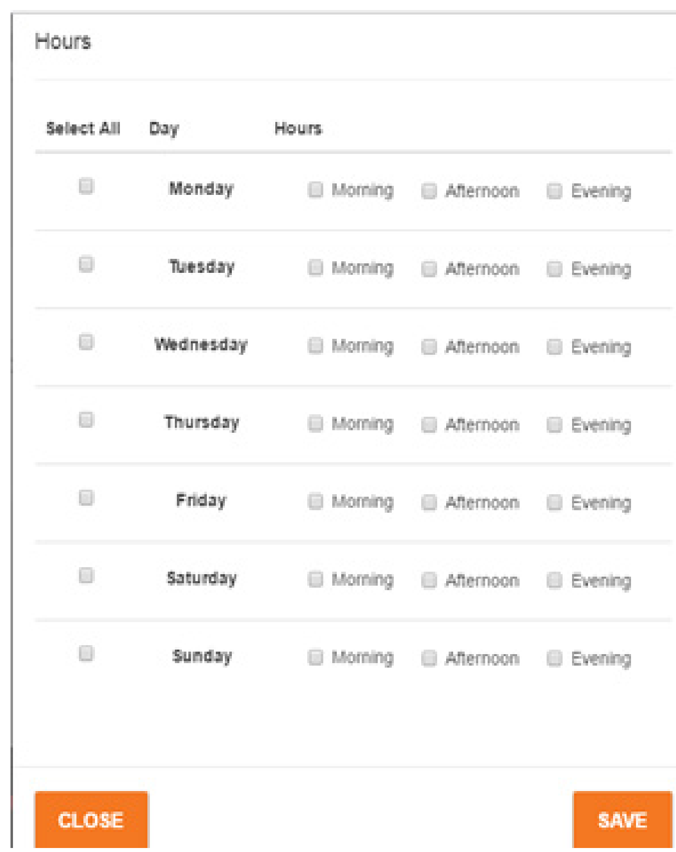
Account Details - Locations

The **Locations Section** captures your office address and regular work schedule (days and hours) at that office address. Location name should default to the individual name or group name that is listed in personal details.
+ADD A LOCATION for each office where you see patients.



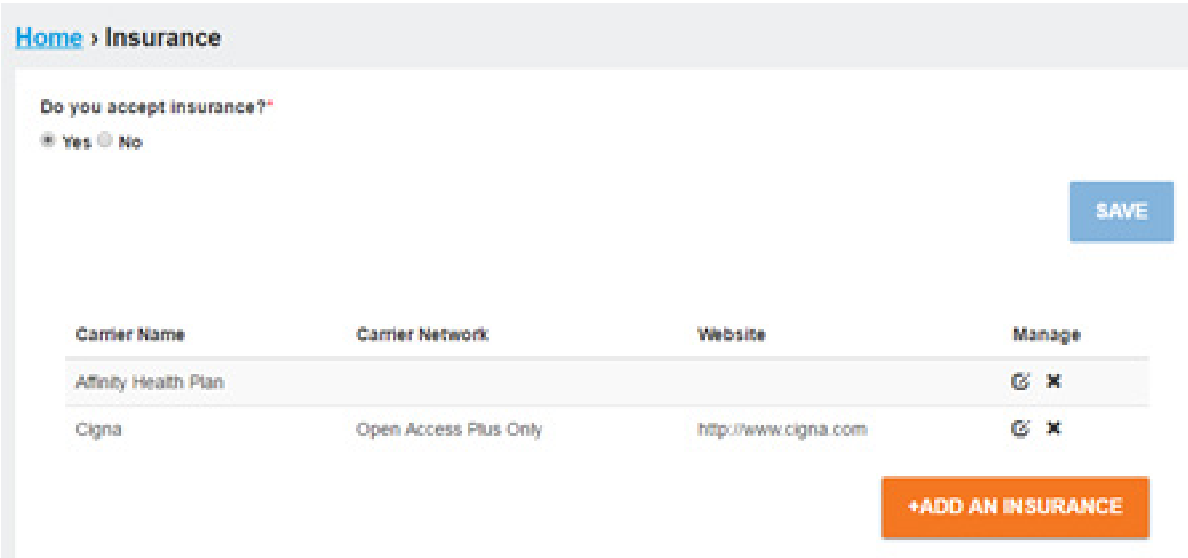
Clicking on **+ADD A LOCATION** will display the following wizard to prompt you to add a location(s).

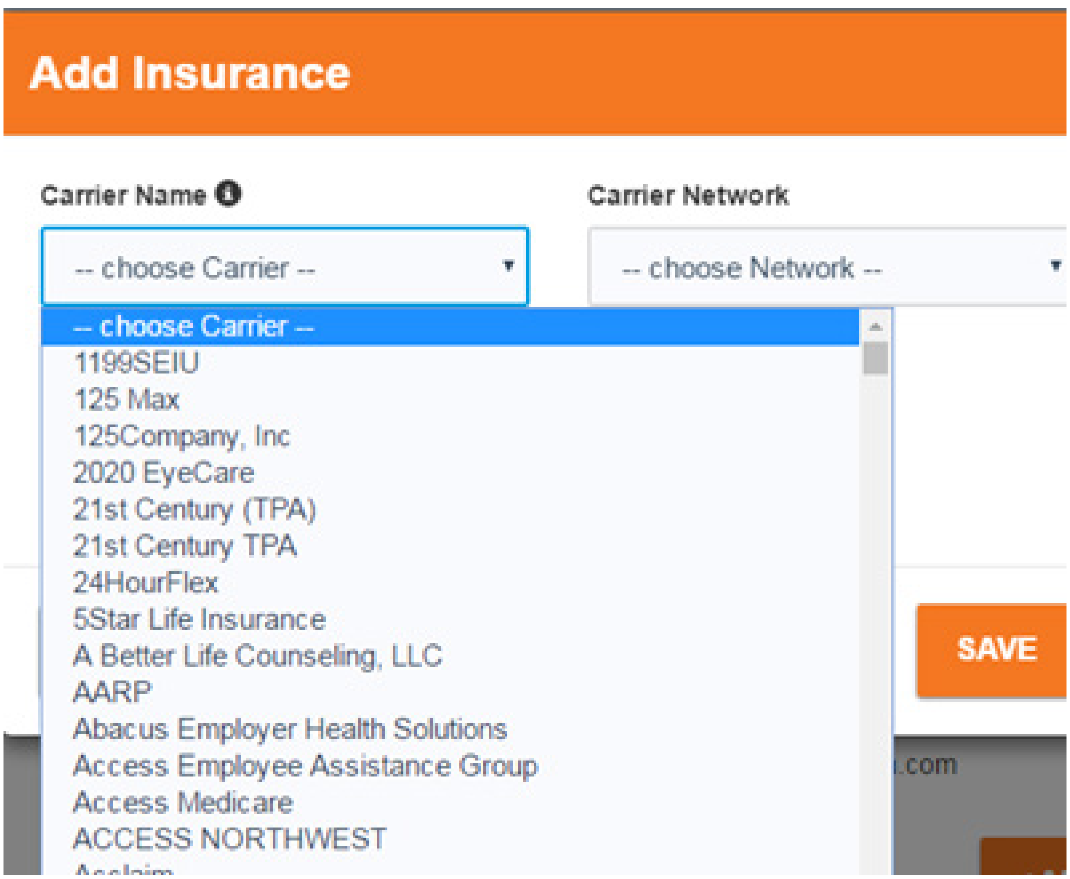




Account Details - Insurance Accepted

The **Insurance Accepted Section** captures whether you accept insurance. Use the **+ ADD AN INSURANCE** to select the carrier name(s) and networks you accept.





Alert Messages & Emails

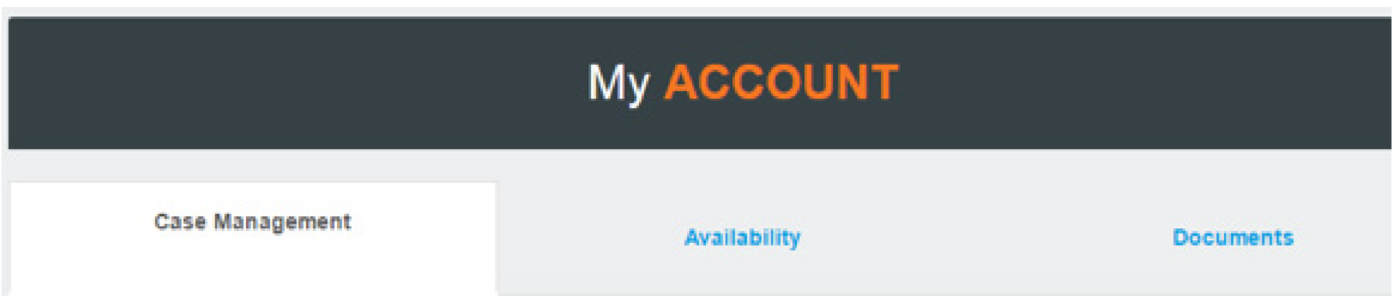
You will see an alert on the home page directly above **Your Account** 30 days prior to your license or liability coverage expiration date.

Note: If your liability coverage and license has expired, Health Advocate will not be able to refer new cases, and payment on open cases will be suspended until your account is updated.

My Account for Individual Practice

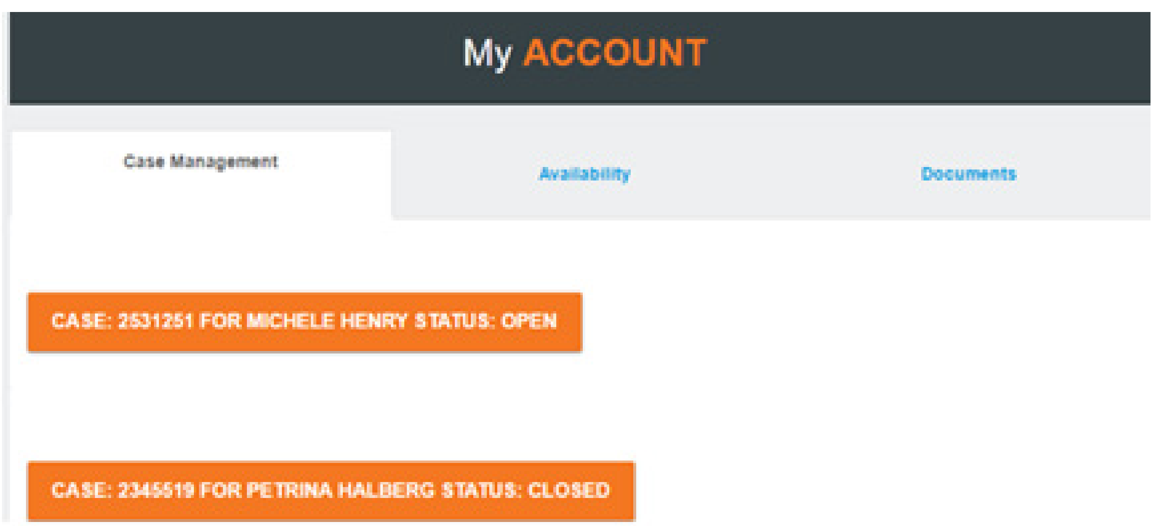
My Account consists of the following three tools to assist you in managing your day-to-day practice with Health Advocate:

- Case Management
- Availability
- Documents

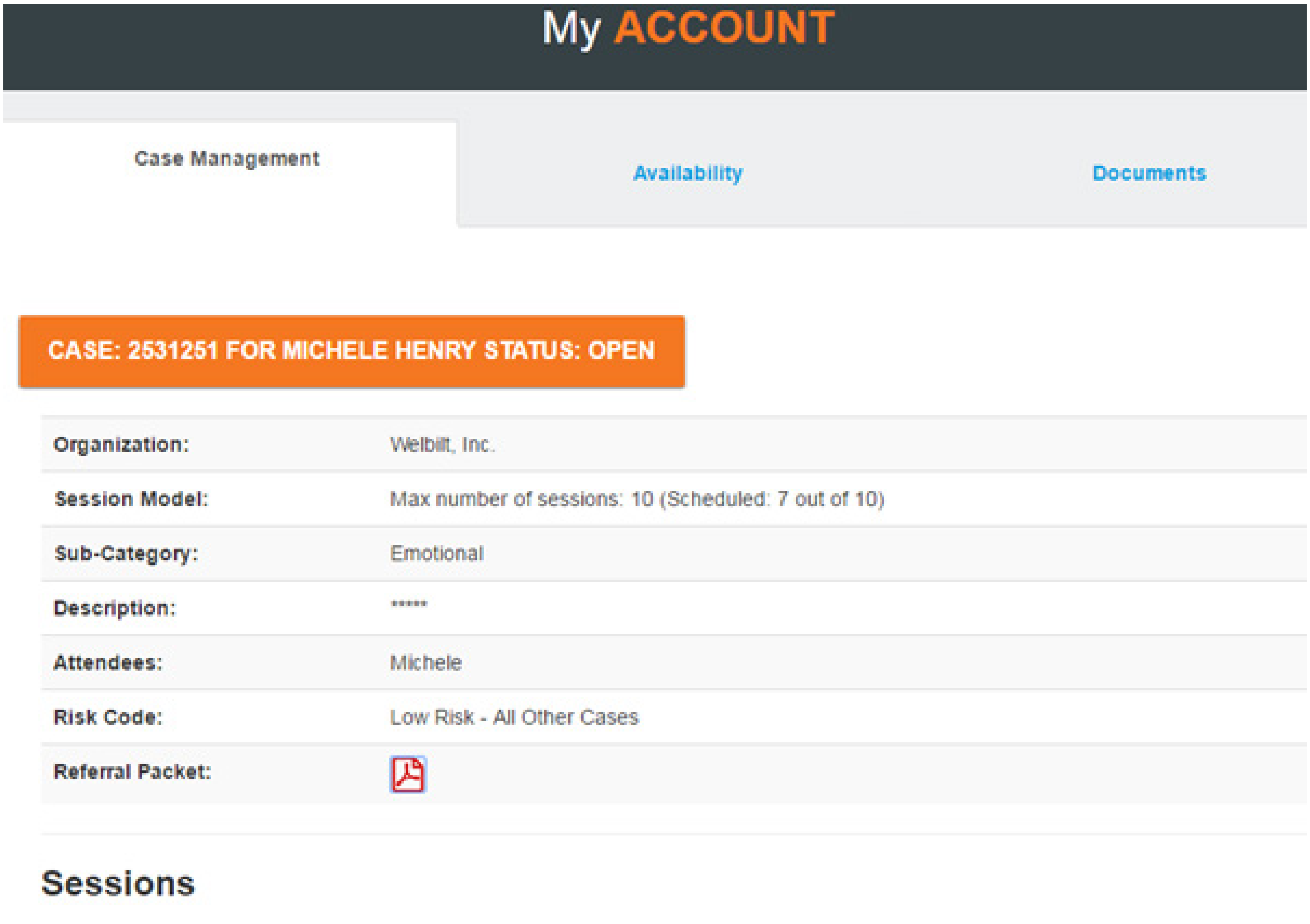


Case Management for Individual Practice

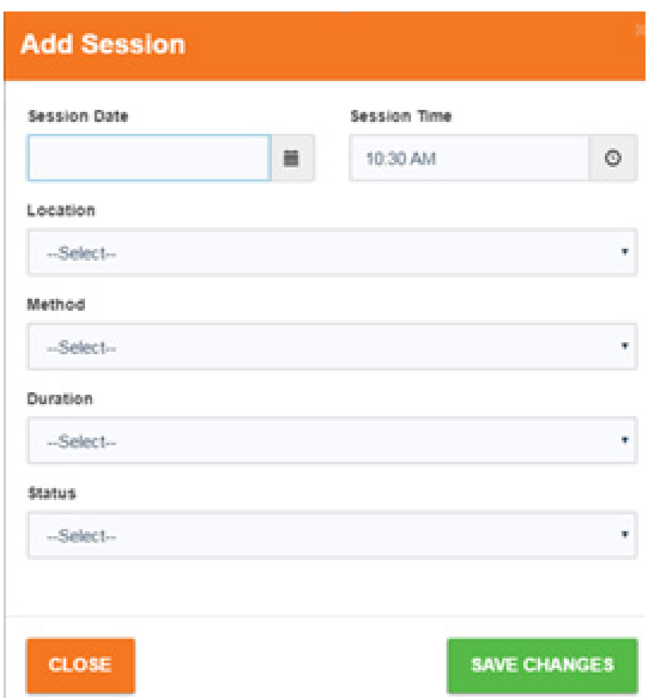
Open and new cases are located in the **Case Management** tab.



Click on the Case to view its details, including session model, referral package and pop-up windows to help you manage your sessions.



Clicking on **+Add A Session** button will display a pop-up window to assist you with adding and updating your sessions.



You will need to add the specific session information using the calendar, clock and drop-down tools, and then click on **Save Changes**.

Submitting Invoices

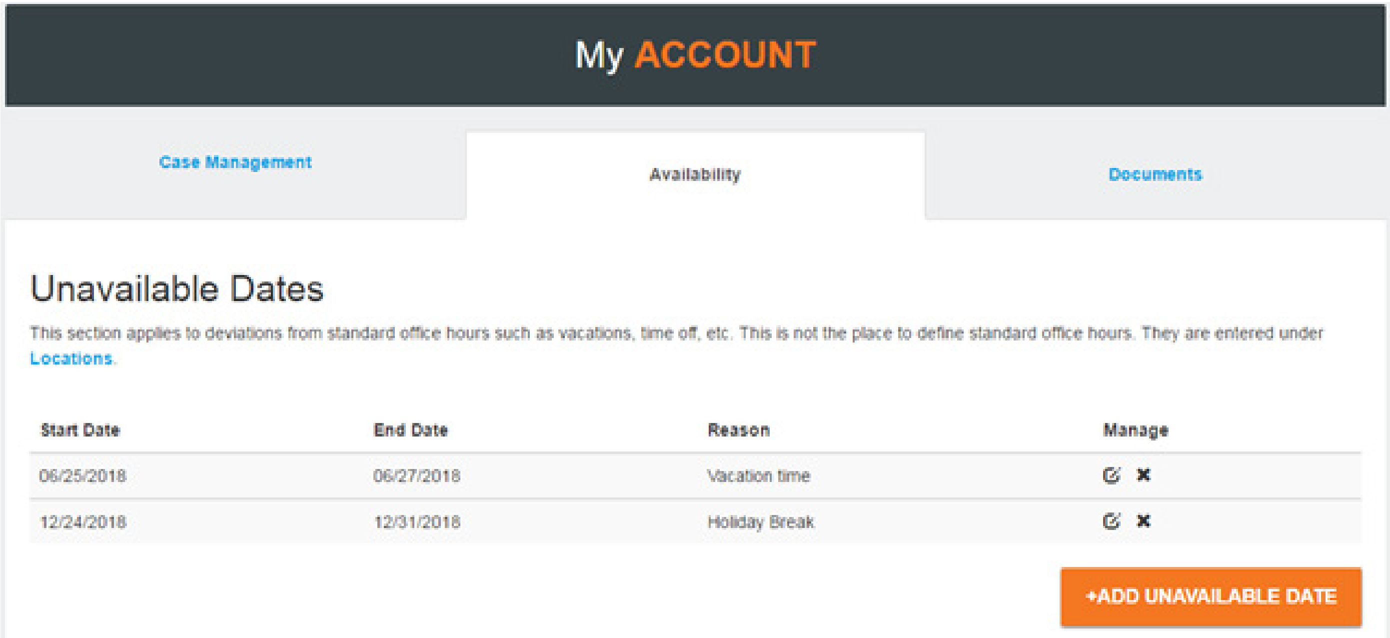
When the session is completed, update the status to complete and then click on "Save." This will trigger the invoicing process. You will not need to submit separate paperwork to be reimbursed for completed sessions.

New Referrals

Health Advocate Affiliate Relations will notify you via email of your new referrals. You can then download and print your referral package from the new open case.

Availability Tab

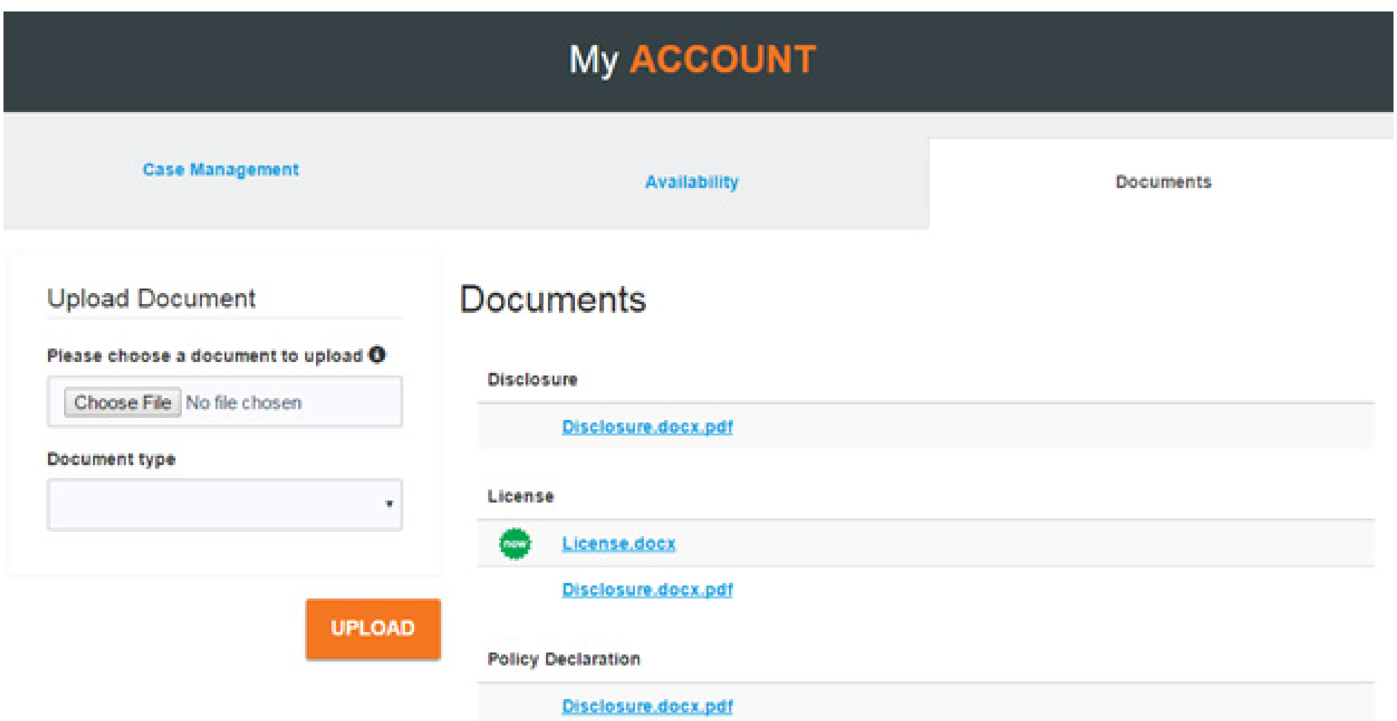
The **Availability Tab** is the area in the portal where you can note any deviations from your standard office hours that you indicated in the "Locations" section in the Account Details.



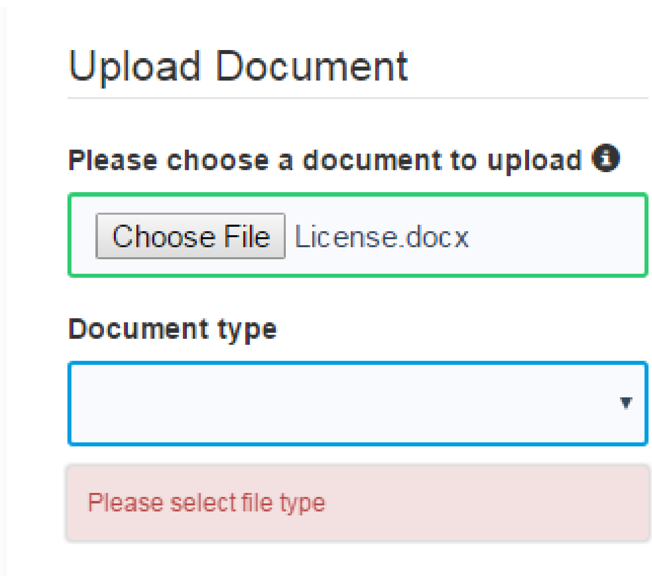
On the far right of the page, you can edit your unavailable dates or delete them as well as add new unavailable dates.

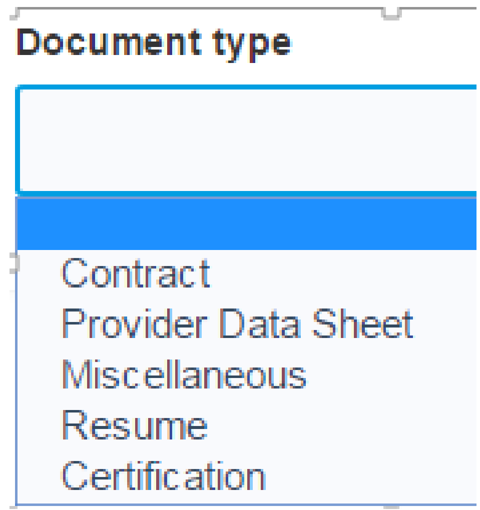
Documents Tab

The **Documents Tab** provides features and functionality to upload any document, such as your resume, contract, etc.

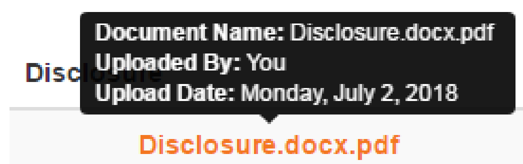


Documents can be uploaded from your computer document library. You will need to select the type of document from the Document type drop-down.





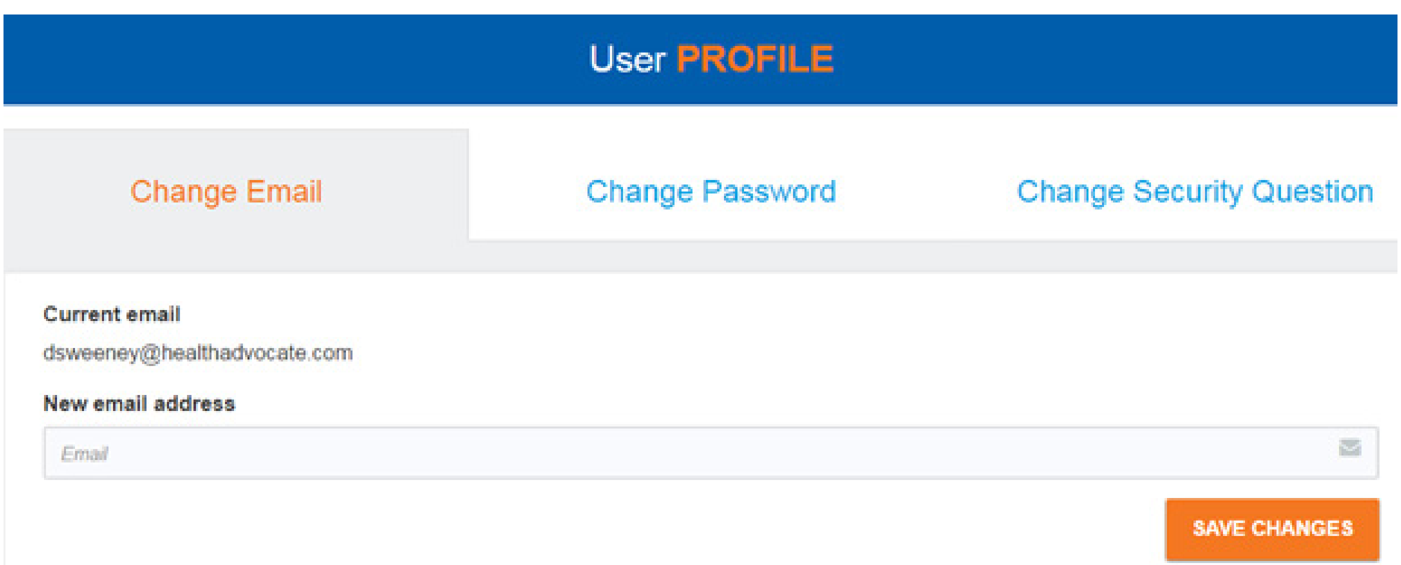
Your uploaded document will be listed in this section. Clicking on the document title hyperlink will open the document so you can review and print it. If you hover over the hyperlink, detailed information about the current uploaded document will be displayed:



User Profile

Clicking on your name, located to the right of Account Details, will display your **User Profile** page. On this page you can make changes to the following that are associated with your account:

- Change your Email Address
- Change your Password
- Change your Security Question



Group Practice Type - Group Admin

Group Practice Type offers additional features and tools in addition to those available for Individual Practice. The lead for the Group Practice is called the **Group Admin**. The Group Admin can add members to the group, complete and update the four sections of "Account Details" for the members associated with the group, and support case management activities.

Individual Practice affiliates associated with the Group Practice can also register and use the portal to update their "Account Details" and manage their cases.

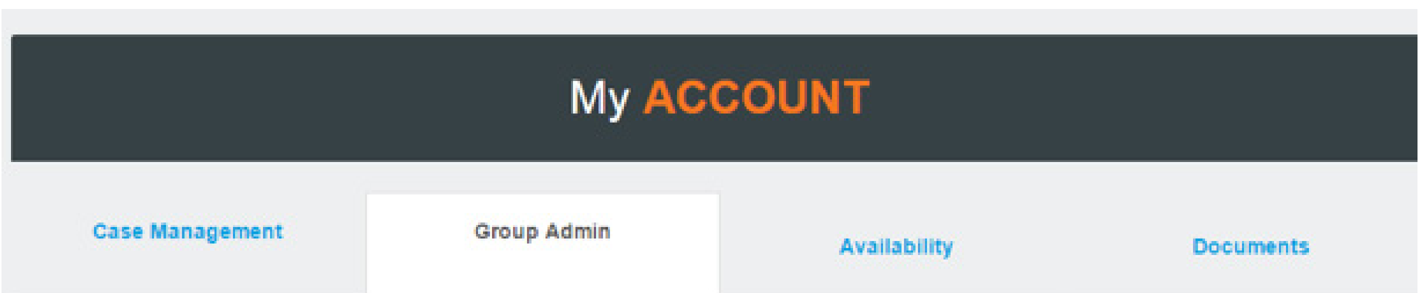
Getting Started

The Group Practice lead needs to register and create their user name and password to access the portal. Reference the Registration, **Account Details** and **Case Management** sections presented earlier in this User Guide as these processes are the same for all practice types.

My Account for Group Admin

Group Admin's **My Account** home page has the following four tabs that the Group Admin can use to manage members and day-to-day practice activities:

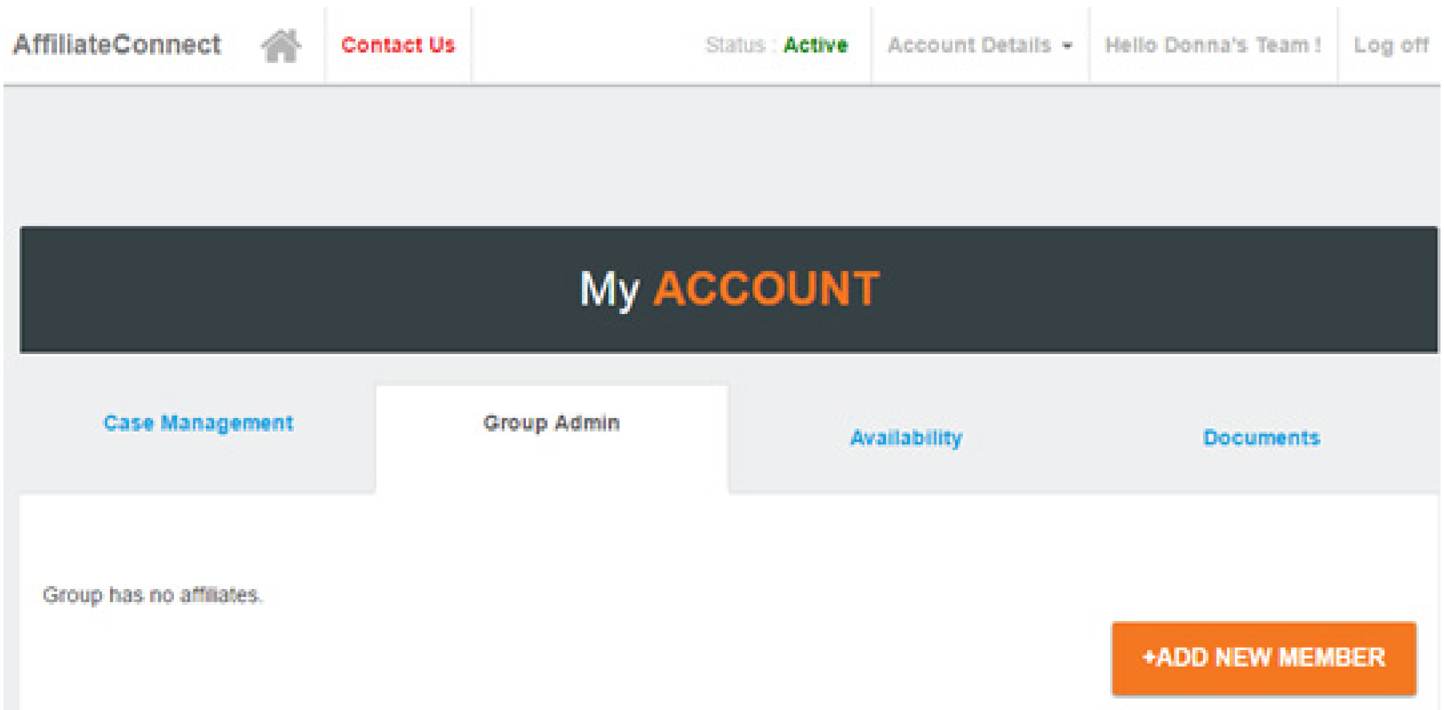
- Case Management
- Availability
- Group Admin
- Documents

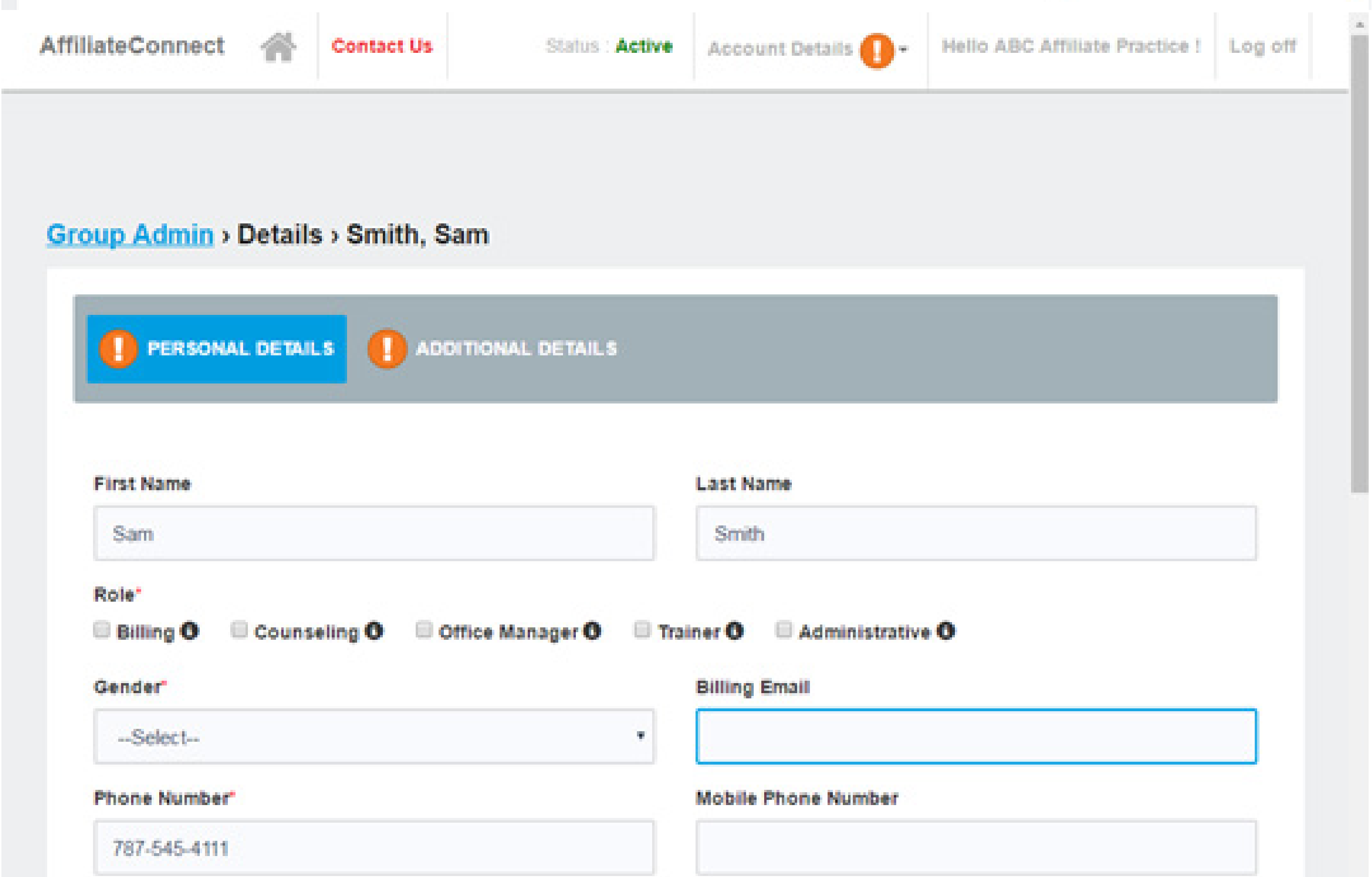


The Group Admin tab is unique to Group Admin. The other 3 tabs, **Case Management, Availability** and **Documents,** are exactly the same as those available for individual affiliates.

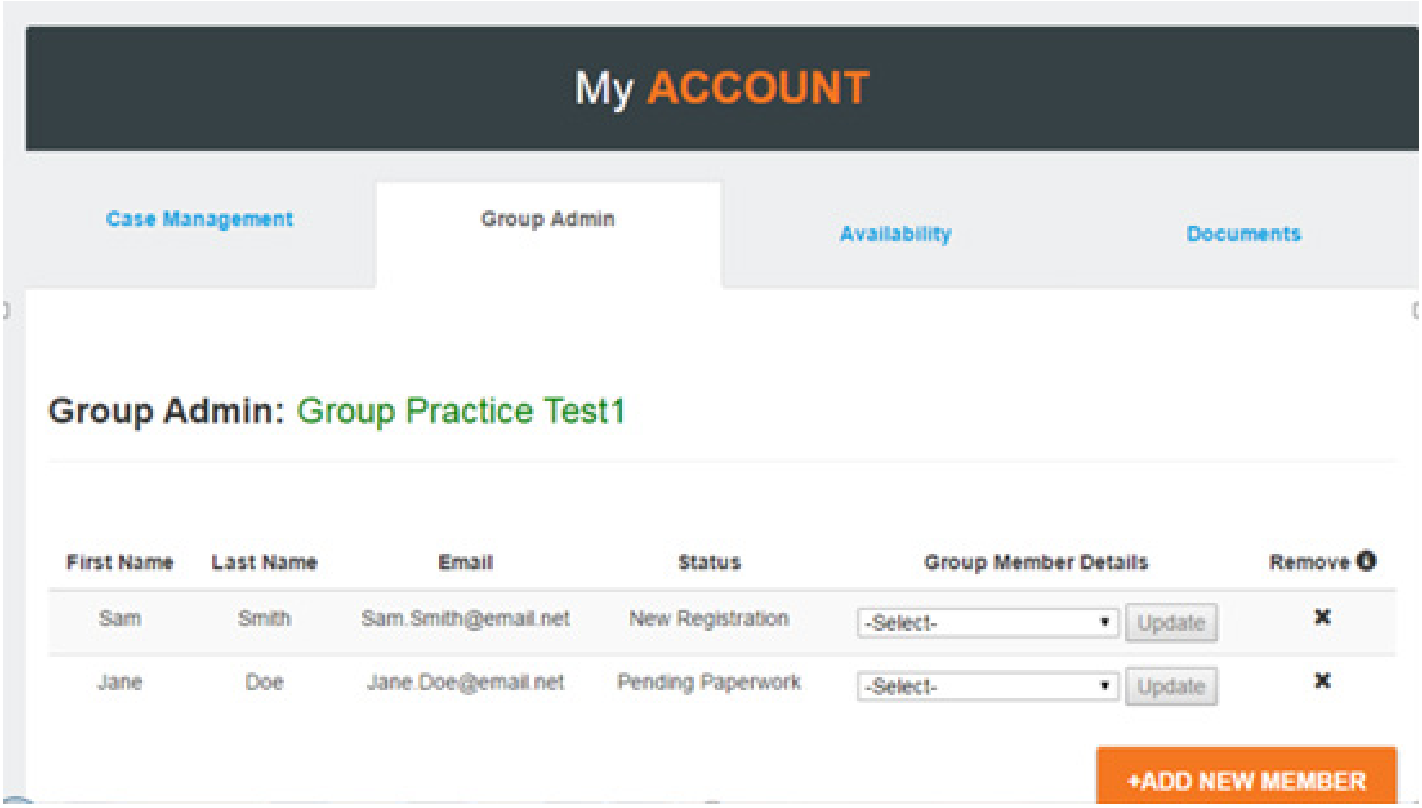
Group Admin - Adding New Members to Group

The **Group Admin** section allows you to add new members by clicking on the **+ADD NEW MEMBER** button on the Group Admin Tab and complete the Personal Details and Additional Details for the members of the group, along with License & Credentials, Locations and Insurance Accepted.

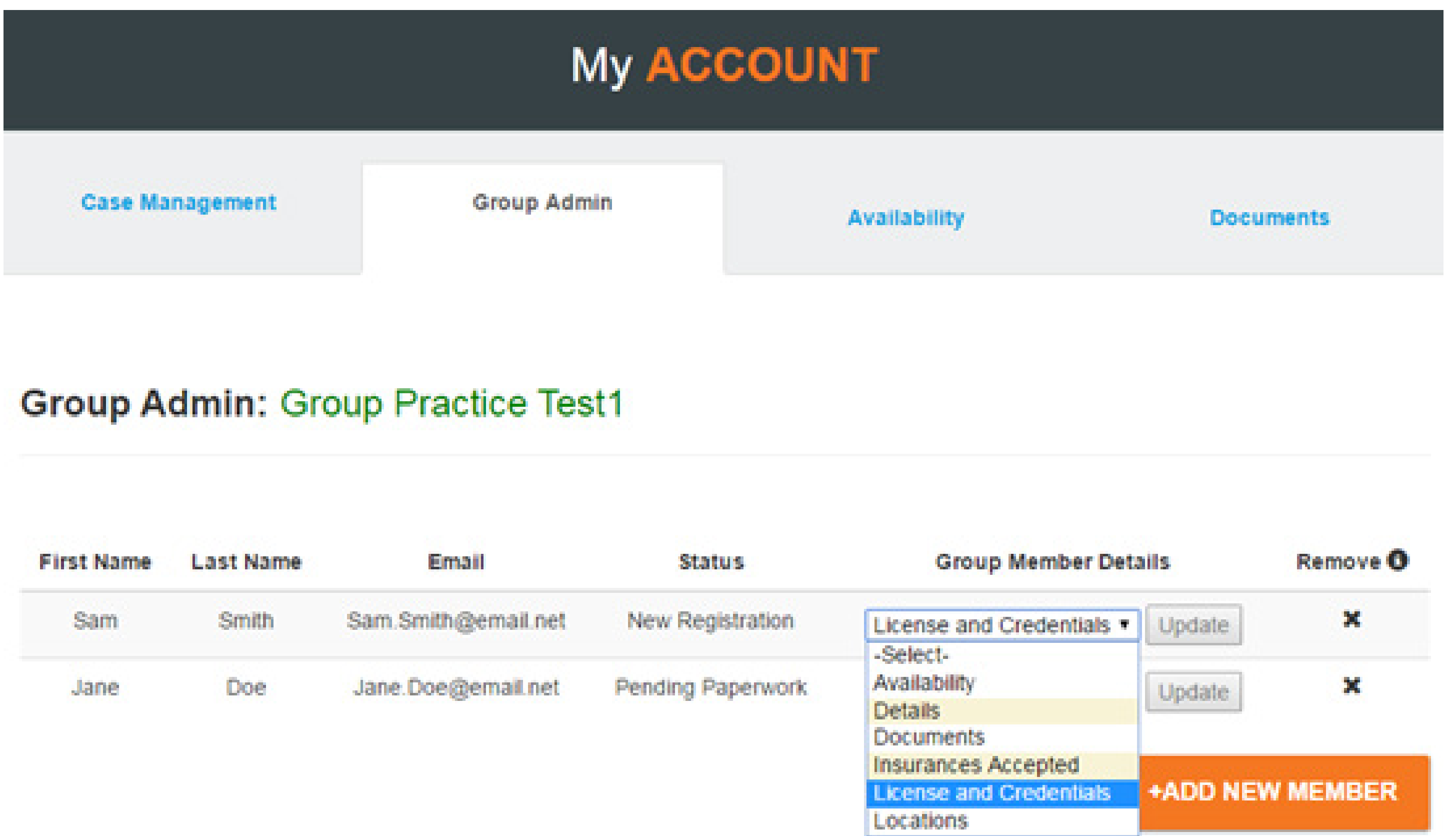


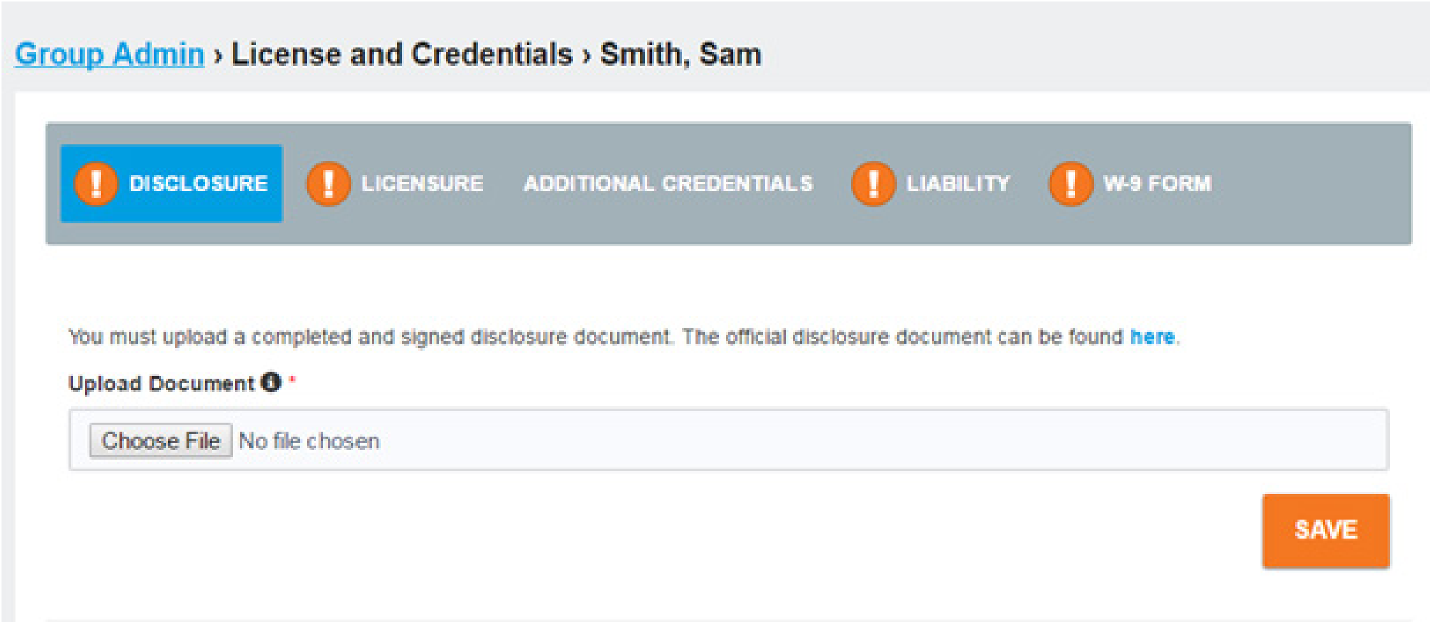


Once a member has been added, they will appear in the Group Admin Group tab where the Group Admin can view their “Status.”



Click on the Group Member Details dropdown menu arrow to select one of the sections and then click on **Update** to access the page that you want to reviewed and updated.

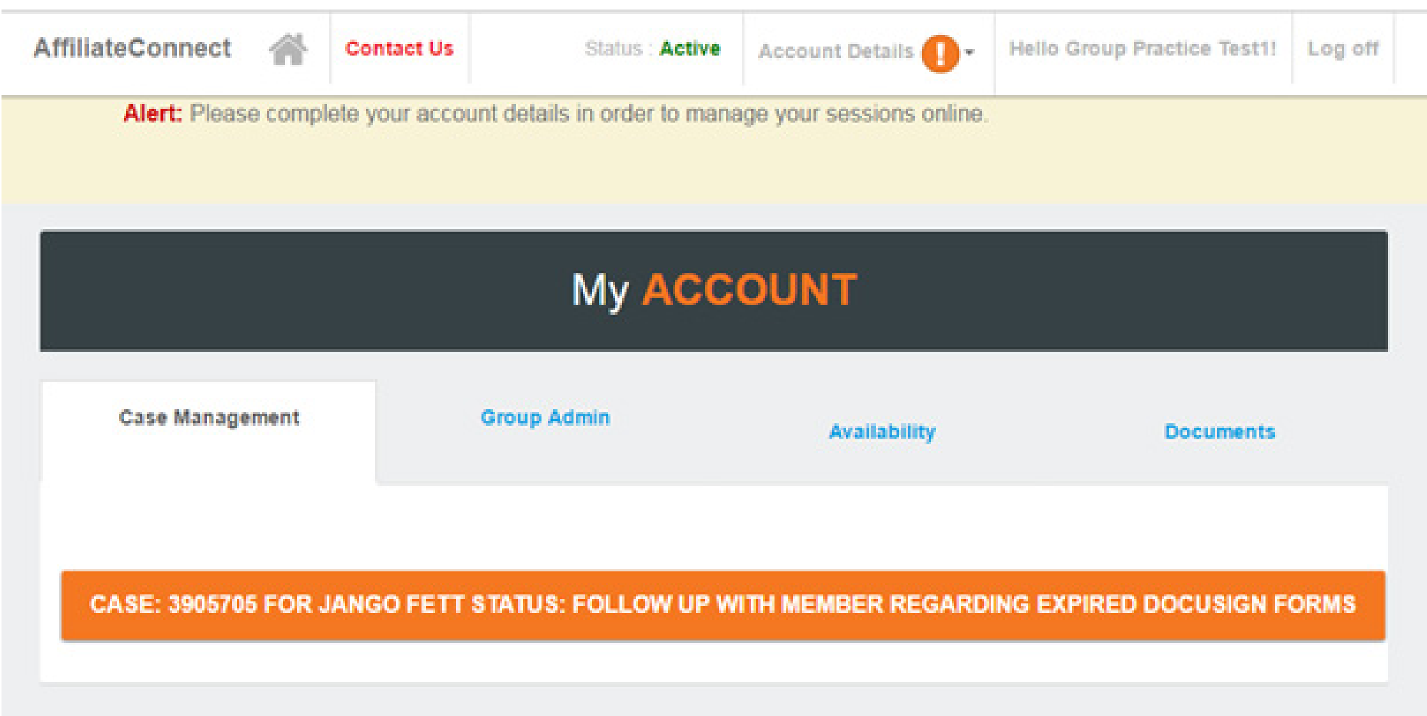




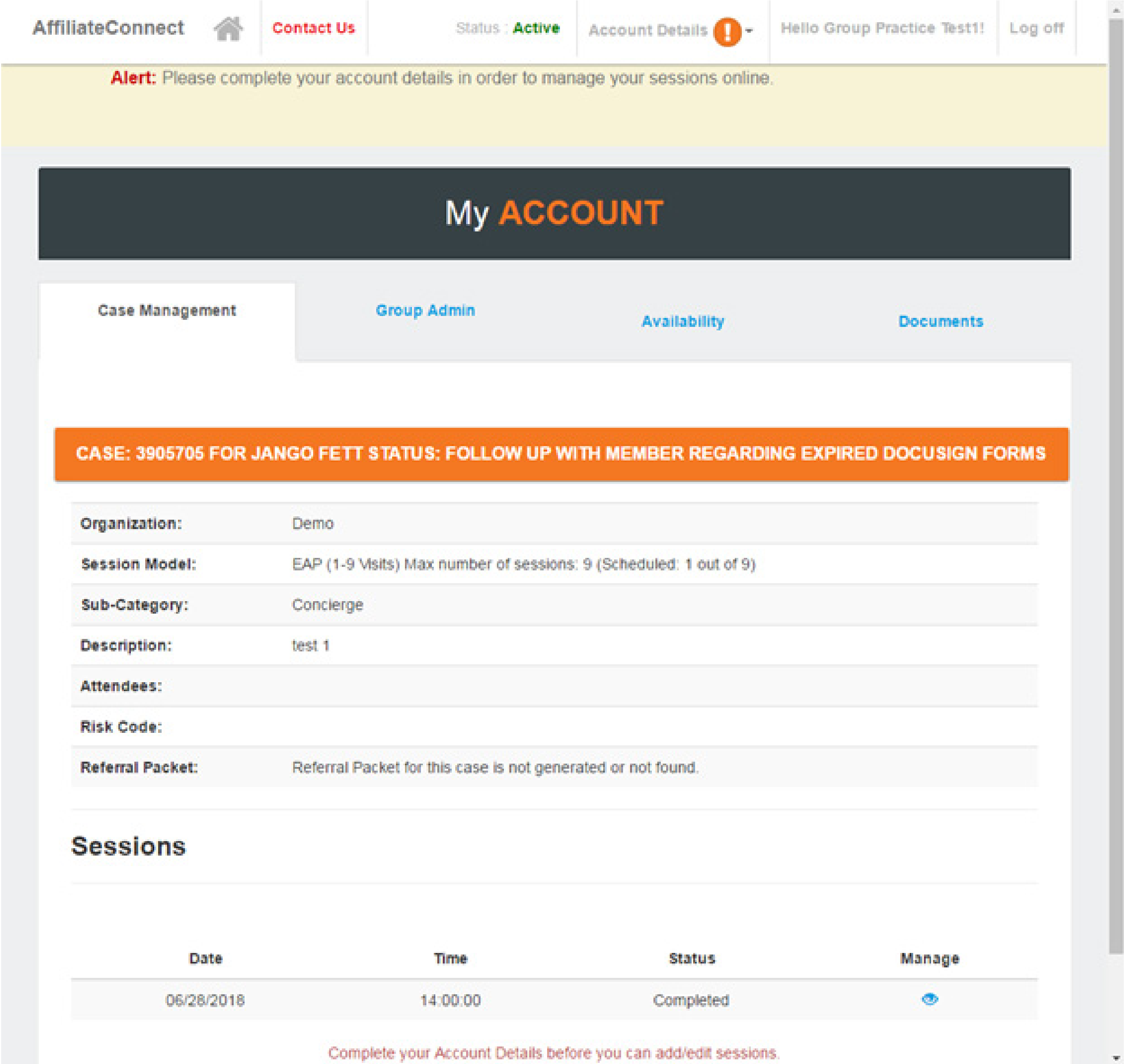
Once the active information is added, Health Advocate will change the status from **New Registration** to **Pending Paperwork** and then to **Active**.

Case Management for Group Admin

The Group Admin can manage cases for their members via the **Case Management** tab. Open Cases will be listed, along with any alerts, such as the need to update required information.



Sessions cannot be added, updated or submitted for payment until all information in Account Details is complete and current.



Completed Session Billing

Update the session to **Completed** as soon as it is completed. This will trigger the invoicing process and be included in the current payment processing process.

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