



Affiliate Portal User Guide



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AffiliateConnect Registration

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

Registration

Practice Type

☐ Group Practice ☒ Individual

First Name

Last Name

Email

Password

Confirm password

Phone Number

Federal ID

License Number

License State

Security Question

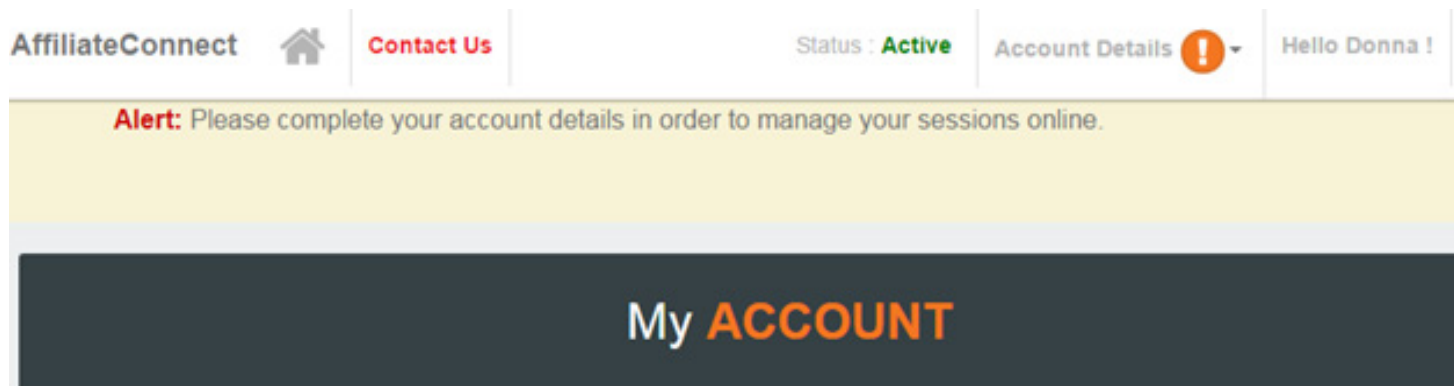
Answer

REGISTER

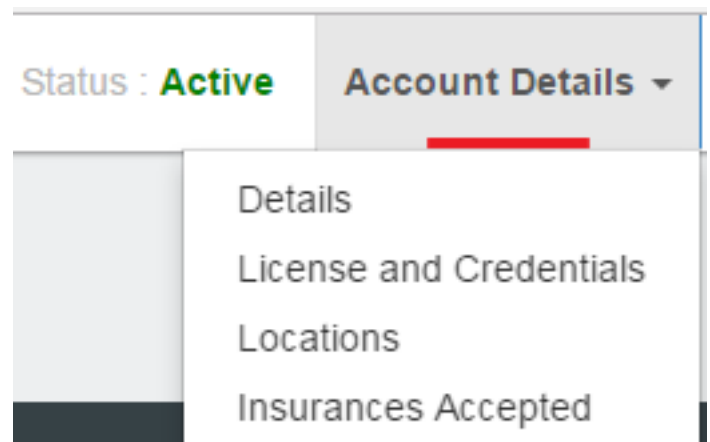
After completing the registration process, you will receive an email from Health Advocate. Click on the registration link within the email to confirm your email address and then you will be able to log in to AffiliateConnect. You will not be able to log in to the portal until you verify your email address.

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:

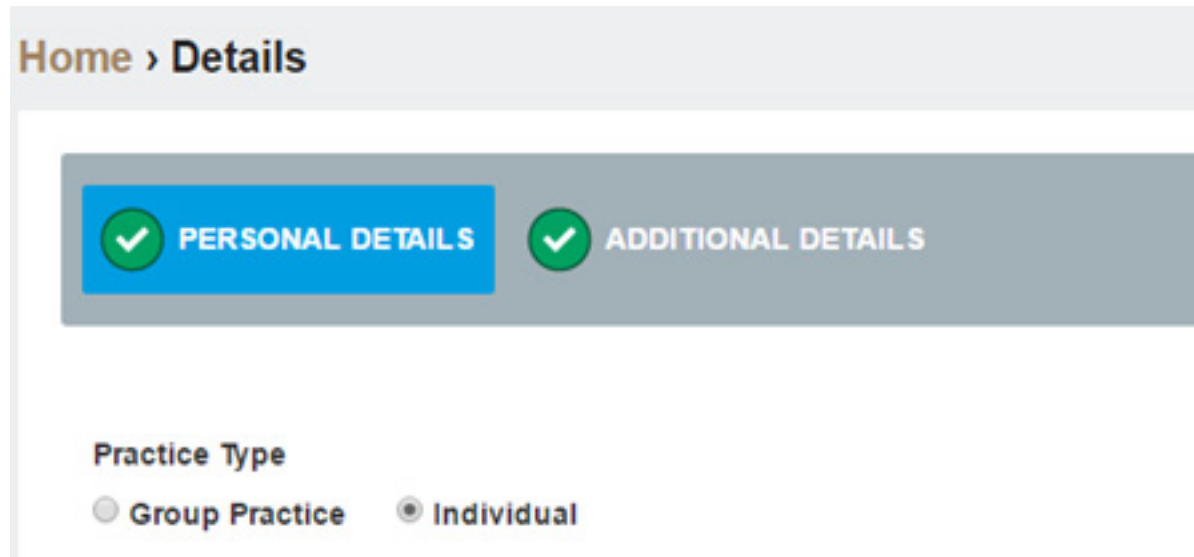
- A green check mark adjacent to an item indicates that the item/section is complete.
- An orange exclamation point adjacent to an item indicates that information is missing.
- A Required Information Message will appear if you hit the “Save” button and a required field is blank. You will need to provide 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.



The screenshot shows a web interface for account details. At the top, there is a breadcrumb trail: "Home > Details". Below this, there is a horizontal bar with two buttons: "PERSONAL DETAILS" (highlighted in blue) and "ADDITIONAL DETAILS" (in grey). Both buttons have a green checkmark icon. Below the buttons, there is a section titled "Practice Type" with two radio button options: "Group Practice" and "Individual". The "Individual" option is selected.

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.

Home > License and Credentials

!

DISCLOSURE

✓

LICENSURE

ADDITIONAL CREDENTIALS

✓

LIABILITY

✓

Choose File No file chosen

SAVE

- 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.

Home > License and Credentials

✓

DISCLOSURE

✓

LICENSURE

ADDITIONAL CREDENTIALS

✓

✓

SAVE

+ADD LICENSE

Add License

License Number*

57489d67y

License State*

New York

License Expiration Date*

Jul 2019

Su

Mo

Tu

We

Th

Fr

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30

31

CLOSE

License Type*

--Select--

License Type is required

SAVE CHANGES

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.

[Home](#) > **Locations**

Name	Billing Location	Address	City	State	Manage
Plymouth Meeting Office	No	3340 Walton Road	Plymouth Meeting	PA	

+ADD A LOCATION

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

Add Location

Location Name*

☐ Billing Location

☐ Home Office

☒ Counseling Location

☒ Handicapped Accessible

☒ Active

Address Line 1*

☐ Billing Location

☐ Home Office

☒ Counseling Location

☒ Handicapped Accessible

☒ Active

Address Line 1*

Address Line 2

Zip Code*

Location County*

Location Email

Location Phone*

Location Fax

Hours

Select All

Day

Hours

☐

Monday

☐ Morning

☐ Afternoon

☐ Evening

☐

Tuesday

☐ Morning

☐ Afternoon

☐ Evening

☐

Wednesday

☐ Morning

☐ Afternoon

☐ Evening

☐

Thursday

☐ Morning

☐ Afternoon

☐ Evening

☐

Friday

☐ Morning

☐ Afternoon

☐ Evening

☐

Saturday

☐ Morning

☐ Afternoon

☐ Evening

☐

Sunday

☐ Morning

☐ Afternoon

☐ Evening

CLOSE

SAVE

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.

[Home](#) > Insurance

Do you accept insurance?*

☒ Yes ☐ No

[SAVE](#)

Carrier Name	Carrier Network	Website	Manage
Affinity Health Plan			🔗 ✕
Cigna	Open Access Plus Only	http://www.cigna.com	🔗 ✕

[+ADD AN INSURANCE](#)

Add Insurance

Carrier Name ⓘ

Carrier Network

-- choose Carrier --

-- choose Network --

-- choose Carrier --

- 1199SEIU
- 125 Max
- 125Company, Inc
- 2020 EyeCare
- 21st Century (TPA)
- 21st Century TPA
- 24HourFlex
- 5Star Life Insurance
- A Better Life Counseling, LLC
- AARP
- Abacus Employer Health Solutions
- Access Employee Assistance Group
- Access Medicare
- ACCESS NORTHWEST
- Academy

[SAVE](#)

.com

Alert Messages & Emails

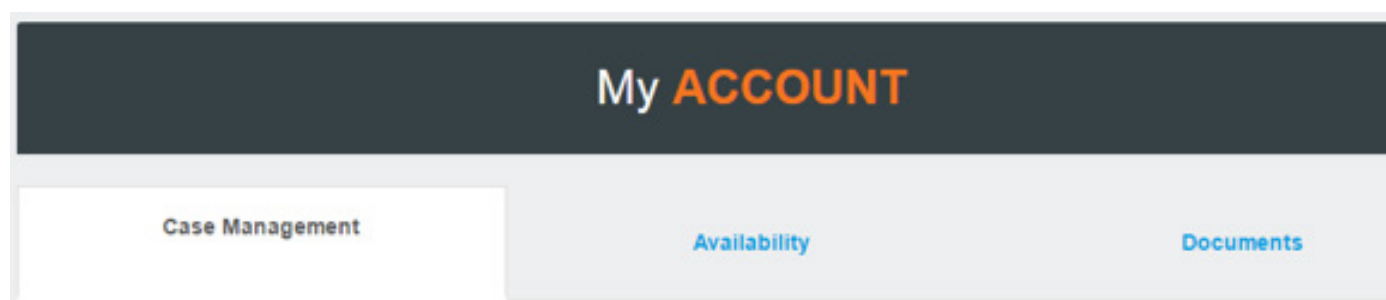
You will see an alert on the home page directly above **Your Account** 30 days prior to your license or liability coverage expiration date.

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

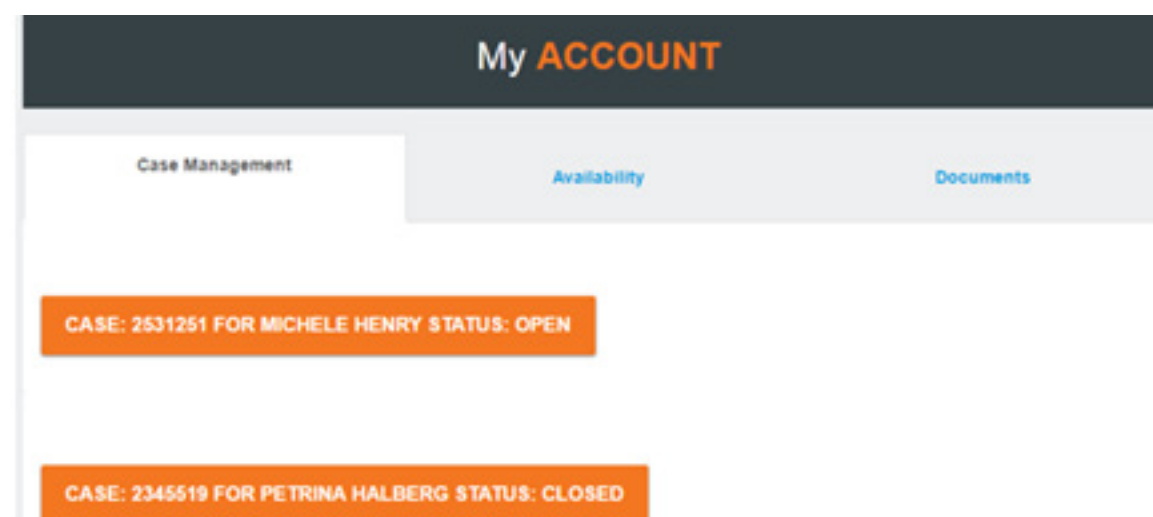
My Account consists of the following three tools to assist you in managing your day-to-day practice with Health Advocate:

- 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.

My ACCOUNT

Case Management

Availability

Documents

CASE: 2531251 FOR MICHELE HENRY STATUS: OPEN


Organization:	Welbilt, Inc.
Session Model:	Max number of sessions: 10 (Scheduled: 7 out of 10)
Sub-Category:	Emotional
Description:	*****
Attendees:	Michele
Risk Code:	Low Risk - All Other Cases
Referral Packet:	

Sessions


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

Add Session

Session Date



Session Time



Location

--Select--

Method

--Select--

Duration

--Select--

Status

--Select--

CLOSE

SAVE CHANGES

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.

My **ACCOUNT**

Case Management

Availability

Documents

Unavailable Dates

This section applies to deviations from standard office hours such as vacations, time off, etc. This is not the place to define standard office hours. They are entered under [Locations](#).

Start Date	End Date	Reason	Manage
06/25/2018	06/27/2018	Vacation time	
12/24/2018	12/31/2018	Holiday Break	

+ADD UNAVAILABLE DATE

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.

My **ACCOUNT**

Case Management

Availability

Documents

Upload Document

Please choose a document to upload ⓘ

Choose File

No file chosen

Document type

UPLOAD

Documents

Disclosure

[Disclosure.docx.pdf](#)

License

[License.docx](#)
[Disclosure.docx.pdf](#)

Policy Declaration

[Disclosure.docx.pdf](#)

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

Upload Document

Please choose a document to upload ⓘ

Choose File

License.docx

Document type

Please select file type

Document type

Contract
Provider Data Sheet
Miscellaneous
Resume
Certification

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:

Disc

Document Name: Disclosure.docx.pdf
Uploaded By: You
Upload Date: Monday, July 2, 2018

Disclosure.docx.pdf

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

User PROFILE

Change Email

Change Password

Change Security Question

Current email

dsweeney@healthadvocate.com

New email address

Email

SAVE CHANGES

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.

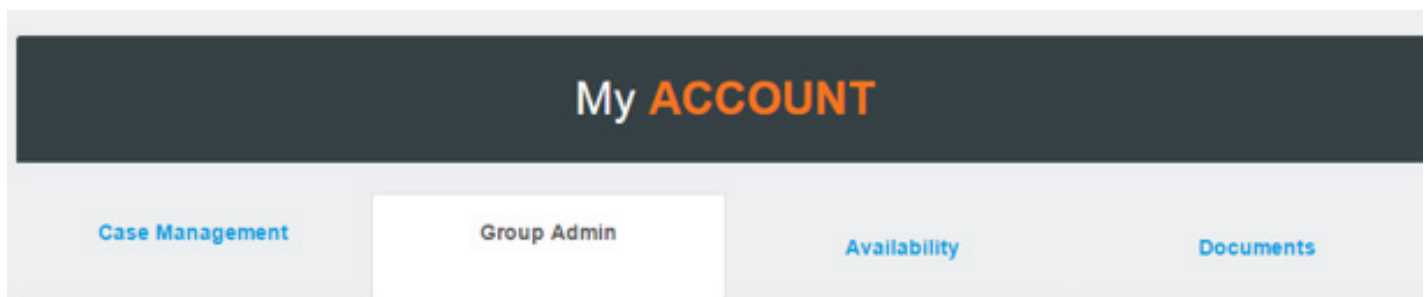
Getting Started

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.

AffiliateConnect

Contact Us

Status : Active

Account Details

Hello Donna's Team !

Log off

My ACCOUNT

Case Management

Group Admin

Availability

Documents

Group has no affiliates.

+ADD NEW MEMBER

AffiliateConnect

Contact Us

Status : Active

Account Details

Hello ABC Affiliate Practice !

Log off

Group Admin > Details > Smith, Sam

PERSONAL DETAILS

ADDITIONAL DETAILS

First Name

Sam

Last Name

Smith

Role*

☐ Billing ⓘ ☐ Counseling ⓘ ☐ Office Manager ⓘ ☐ Trainer ⓘ ☐ Administrative ⓘ

Gender*

--Select--

Billing Email

Phone Number*

787-545-4111

Mobile Phone Number

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

My ACCOUNT

[Case Management](#)[Group Admin](#)[Availability](#)[Documents](#)

Group Admin: Group Practice Test1

First Name	Last Name	Email	Status	Group Member Details	Remove
Sam	Smith	Sam.Smith@email.net	New Registration	-Select- <input type="button" value="Update"/>	✕
Jane	Doe	Jane.Doe@email.net	Pending Paperwork	-Select- <input type="button" value="Update"/>	✕

+ADD NEW MEMBER

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.

My ACCOUNT

[Case Management](#)[Group Admin](#)[Availability](#)[Documents](#)

Group Admin: Group Practice Test1

First Name	Last Name	Email	Status	Group Member Details	Remove
Sam	Smith	Sam.Smith@email.net	New Registration	<div>License and Credentials ▾ -Select- Availability Details Documents Insurances Accepted License and Credentials Locations</div> <input type="button" value="Update"/>	✕
Jane	Doe	Jane.Doe@email.net	Pending Paperwork	<input type="button" value="Update"/>	✕

+ADD NEW MEMBER

! DISCLOSURE **!** LICENSURE ADDITIONAL CREDENTIALS **!** LIABILITY **!** W-9 FORM

You must upload a completed and signed disclosure document. The official disclosure document can be found [here](#).

Upload Document **!** *


Choose File No file chosen

SAVE

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.

[AffiliateConnect](#)  [Contact Us](#) Status : **Active** Account Details **!** [Hello Group Practice Test1!](#) [Log off](#)

Alert: Please complete your account details in order to manage your sessions online.

My ACCOUNT

[Case Management](#) [Group Admin](#) [Availability](#) [Documents](#)

CASE: 3905705 FOR JANGO FETT STATUS: FOLLOW UP WITH MEMBER REGARDING EXPIRED DOCUSIGN FORMS

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



Alert: Please complete your account details in order to manage your sessions online.

My ACCOUNT

[Case Management](#)[Group Admin](#)[Availability](#)[Documents](#)

CASE: 3905705 FOR JANGO FETT STATUS: FOLLOW UP WITH MEMBER REGARDING EXPIRED DOCUSIGN FORMS

Organization: Demo

Session Model: EAP (1-9 Visits) Max number of sessions: 9 (Scheduled: 1 out of 9)

Sub-Category: Concierge

Description: test 1

Attendees:

Risk Code:

Referral Packet: Referral Packet for this case is not generated or not found.

Sessions

Date	Time	Status	Manage
06/28/2018	14:00:00	Completed	

Complete your Account Details before you can add/edit sessions.

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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