Claims Communication Portal Training

MedPro Group Defense Attorneys and Defense Firm Users

Contents

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How to Use This Guide

Welcome to the Claims Communication Portal practice guide. This user guide will teach you how to access the Claims Portal and upload documents and narratives related to the defense of a case, using the Claims Portal instead of email.

Resources:
You can access the following job aids from the Claims Portal resources page (www.medpro.com/cpresources). These job aids are specifically designed to support you in your work using the Claims Portal and address step-by-step actions as well as how to address common questions and challenges.

a) Request Access to Claims Communication Portal
b) Activate Your Claims Communication Portal Account
c) Document Submission Landing Page Overview
d) Edit User Profile
e) Submit Claims Documentation

Access the Claims Communication Portal:

For training: We will be using the *live production* environment for training and practice purposes. **PLEASE PAY CLOSE ATTENTION TO TRAINING INSTRUCTIONS IN ORDER TO MINIMIZE ACCIDENTAL SUBMISSION OF CONFIDENTIAL INFORMATION**.

URL: https://claimscommunication.medpro.com

DEMO: Requesting Access for new users

MedPro has set-up access for Defense firm users based upon names provided by each firm at the time of go-live (November 8, 2021). If someone needs access that has not been included in this process, they can initiate an access request directly on the site access page.

Refer to "Request Access to Claims Communication Portal" for step-by-step instructions.

Once a requestor is set-up, they will receive a system-generated email to activate their account.

Refer to "Activate Your Claims Communication Portal Account" for step-by-step instructions.

Exercise 1: Access the Claims Communication Portal Using 2-Factor Authentication

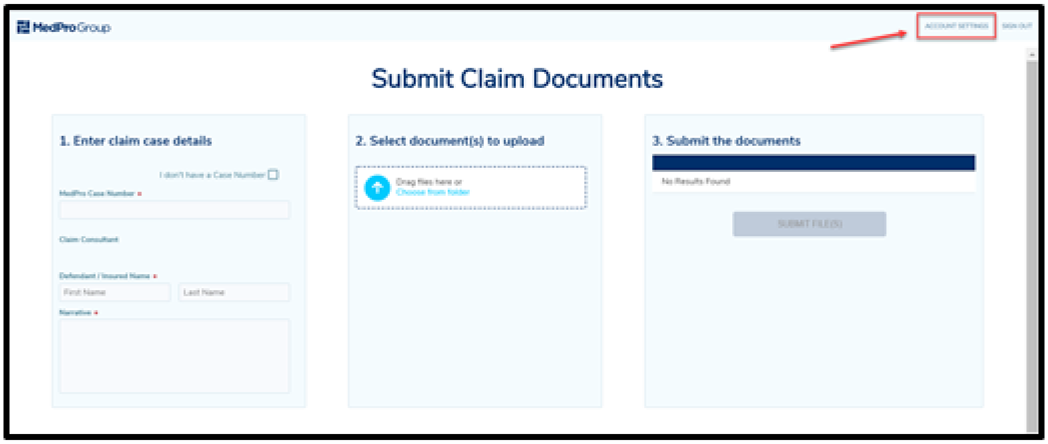
In this exercise, you will:

- Practice accessing the Claims Communication Portal
- Create a bookmark for ease of future access
- Learn which browser(s) to use for best performance
- Identify time-out limits and how to re-gain access if you've been timed out of the system

Scenario: You have several documents that you need to provide to your MedPro Group Claims Consultant. You navigate to the Claims Communication Portal URL (https://claimscommunication.medpro.com) and enter your username and password to log in. Next you are prompted to use a secondary authentication method (e.g. OKTA, secret question, text code to cellphone) to confirm your log in.

NOTE: For best performance, please use Microsoft Edge, Safari, Chrome or Firefox. Internet Explorer (IE11) is not supported.

When you first sign into the Claims Portal, your screen will look like this:



Refer to the Defense Firm Document Submission Landing Page Overview for a description of each element.

Time Out!

Q: Do I need to log in and log out EVERY time I use the Claims Portal? Can I just stay logged in all day?

A: Duck Creek has a platform constraint that will automatically log you out after 30 minutes. We're working with Duck Creek to extend this but for now, be aware the system will request your username and password to re-log into the Claims Portal. After 24 hours of inactivity, you may be prompted to re-authenticate with OKTA (or your designated multi-factor authentication method) first.

Exercise 2: Review/Edit Your Personal Profile

In this exercise, you will:

- Locate your user profile and review details.
- Identify password update section.
- Identify existing multi-factor authentication methods.
- Add a text update for forgotten password (if not already in place).

NOTE: Your password will not expire. As a best practice, you can change your password manually in the Edit Profile password management section.

Scenario: You previously added a special security question as part of your account and password recovery. As an additional safety precaution, you'd also like to get a code texted to your cell phone in case you get locked out of your account.

Step 1: Navigate to Account Settings and select "Edit Profile"

Step 2: Verify your password.

Step 3: Review profile information. Update as desired.

Step 4: Return to the main entry screen by selecting "Work" in left navigation.

Exercise 3: Submit Documentation to MedPro Group

In this exercise, you will:

- Initiate a submission
- Complete the Submission Header
- Upload documents
- Delete an uploaded document
- Submit to your MedPro Group Claims Consultant/desired party

Scenario: You need to send some files and correspondence to your Claims Consultant regarding an active case.

Refer to the Job Aid: Defense Firm_Submit Claim Documents for step-by-step support.

FYI: *When a Defense firm enters the MedPro case number on the submission, the CLAIMS PORTAL will automatically populate the primary Claims Consultant assigned to the file.*

Section 1: Enter claim case details

Step 1: Enter the MedPro Case Number associated with this submission.

If you don’t know the case number, it is beneficial to take the time to look it up so that you can enter it. However, in the situation that you can’t locate the case number, click the box marked “I don’t have a Case Number”. This will allow you to select the name of your Claims Consultant from a drop-down list.

Entering the case number or claims consultant will ensure that your submission goes directly to the inbox for that claims consultant.

NOTE: If you are unable to provide the case number and do not know/can’t locate the Claims Consultant name, then you may choose “Unknown” from the drop-down list of names. Your submission will be directed to a general MedPro Claims mailbox and will be processed as quickly as possible but may experience some processing delay.

FOR THE PURPOSE OF TRAINING: PLEASE DO NOT ENTER A REAL CASE NUMBER!

SELECT “I DON’T HAVE A CASE NUMBER” AND SELECT “UNKNOWN” AS THE CLAIMS CONSULTANT NAME

Step 2: Enter the Defendant / Insured Name

You may enter the First and Last name, or the name of the Organization.

Step 3: Enter any narrative. Narrative is the same as the body of an email – it represents any correspondence you would like to provide about the submission. It will be filed as correspondence.

Section 2: Select document(s) to upload

Step 1: Drag and drop files to upload, or select "choose from folder" to locate and select desired files.

PLEASE BE AWARE: File names may not contain special characters such as @, !, $, &, etc.

There is a known issue with Firefox browser that may cause an upload error if the file name contains spaces. This issue is expected to be resolved by 12/2021.

You can upload a single file or multiple files. There is no limit to file size!

Section 3: Submit the documents

Step 1: Notice that all the documents you uploaded are now visible in the Submit the documents section. Confirm that you have all the correct documents.

You can delete any unwanted files by clicking on the trash can icon to remove them from the submission pane.

Step 2: For each file that you have uploaded, please select the most appropriate document type, and associated document description. A full list of available document types and descriptions is located in the "Submit Claims Documents" job aid.

Step 3: When you are comfortable that the submission is accurate and complete, click to Submit Files.

You'll be asked to confirm your submission. Click Submit to confirm or Cancel to return to the prior screen.

Step 4: Upon successful upload to the portal, you'll see a confirmation screen. You can either log out, or click on Start New Upload to upload a new submission.