NCTracks Day One To-Do List for Providers

The following activities will help providers get a jump start with NCTracks, starting with Day 1:

1. If the **Currently Enrolled Provider (CEP) Registration** process has not been completed, it should be completed now. Providers cannot access the NCTracks Provider Portal or receive payment via EFT without completing the CEP Registration process. Click on the Currently Enrolled Provider Registration link on the left side of the public NCTracks Provider Portal screen for instructions.

2. Office Administrators (OA) should logon to the secure NCTracks Provider Portal using their NCID and set up user access for the staff in their organization who will be using the Portal. Each user is required to have an NCID. If they do not have an NCID, they can obtain one at *ncid.nc.gov*. What follows is an overview. Detailed instructions for assigning user access can be found in the **NCTracks User Access Setup** instructions on the Provider Portal.

    a. OAs should first add the user(s) who will act as User Administrator(s) for their organization. The User Administrator can act as a surrogate for the OA in designating user access to the NCTracks Provider Portal. It is recommended that each organization have at least one User Administrator.

    b. OAs (or User Administrators) can then assign user access to each of the staff who will be using the NCTracks Provider Portal. If general access to users was granted during the CEP Registration process, the OA (or User Administrator) may wish to restrict that access, based on the role the user performs in the organization.

    c. Once the user access has been assigned by the OA (or User Administrator), the users will be able to logon to NCTracks. (The updates are immediate.)

3. Provider staff members can take **training in the NCTracks Provider Portal**. The "Provider Training" page in the public provider portal provides an outline of the courses available, what courses should be taken based on the role in a provider's organization, and instructions on how to use SkillPort, the Learning Management System for NCTracks. Access to SkillPort is through the secure Provider Portal, which requires an NCID. After logging into the secure Provider Portal, provider staff members can click on the "Provider Training" button to enter SkillPort. The Catalog in SkillPort includes eLearning (Computer Based Training) courses as well as recorded webinars, participant guides and job aids.

4. The Office Administrator in each provider organization should go through the Manage Change screens in the secure NCTracks Provider Portal to **verify the provider information on file**. Click on the Enrollment Status and Management button and scroll down to the Manage Change

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section. Click on an NPI in the Manage Change section. The Manage Change screens can be used to review the provider information without making any changes, although if any changes are required, they can be submitted using the Manage Change screens. In particular, verify the “pay-to” and correspondence addresses on file. For instructions on how to use the Manage Change screens, see the Computer Based Training course “Updating Provider Data” in SkillPort.

5. The Office Administrator should also **verify the taxonomy codes on file** for each NPI. (This step is not needed if the taxonomy codes were verified prior to go-live using the Provider Taxonomy Look-up web page.) Taxonomy code information can be viewed using the Manage Change screens in the secure NCTracks Provider Portal. (See number 4) If the taxonomy code needs to be changed, the Manage Change screens can be used to submit the change. Depending on the change in taxonomy code requested, it may require verification of credentials by the fiscal agent. It is important that the taxonomy code information on file be accurate and match what is submitted on the claim.

6. The Office Administrator should also **verify the affiliation information on file** for each NPI. Affiliation information can be viewed using the Manage Change screens in the secure NCTracks Provider Portal. (See number 4) If the affiliation information needs to be changed, the Manage Change screens can be used to submit the change. Bear in mind that it is the individual provider who must change any affiliations to groups or hospitals. Changes in affiliations made through the Manage Change screens in the secure Provider Portal take place immediately, based on the effective dates submitted. It is important that affiliation information on file be accurate to facilitate claims payment.

7. The CEP Registration application only allowed a provider to designate one trading partner. If a provider organization has more than one trading partner, they will need to designate the other trading partners in the secure NCTracks Provider Portal, using the Manage Change process. (See number 4) Examples of providers with multiple trading partners include independent pharmacies that use one trading partner to submit DME claims and another trading partner for post-payment reconciliation. Another example would be a provider who uses different trading partners for eligibility verification and claims submission. The system enables a provider to **maintain multiple trading partners**, but bear in mind that trading partners are required to complete testing and certification with NCTracks before they can submit transactions.

8. **Recredentialing** information that was present in the Enrollment Verification and Credentialing (EVC) system prior to go-live will be transferred to NCTracks. If providers need to take action related to their recredentialing, they can do so using the Manage Change screens in the secure Provider Portal. (See number 4) Otherwise, no action is required by the provider and the fiscal agent will continue to process the recredentialing application.

Any problems with performing the activities on the Day One To-Do List should be reported to the CSC Call Center at 1-800-688-6696 or *NCTracksprovider@nctracks.com*.