

**EXL**



# **Provider Portal**

## **User Manual**

Prepared by: EXL

Revision History

Date	Version	Release Feature	Sections Updated	Created/Updated By	Reviewed/Approved By
29-May-24	8.6.0.4	Captcha Inclusion	Across sections	Sheeba Bhat	M Abhishek
3-May-24	8.6.0.3	Reactivate on Login	Section 5.1	Sheeba Bhat	M Abhishek
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## 1 Introduction

The Provider Portal is a web application where Providers can upload the required medical records pertaining to a claim selected for auditing. During the course of conducting clinical audits, EXL requests medical records from the Providers to validate claims. Providers have the option to submit the required medical records to EXL's Provider Portal.

The Provider Portal application also receives pharmacy related records and will be attached into audits in EXLMine to continue the business performing onsite Pharmacy/Rx audits.

The Portal has a chat service that provides auto response to the provider using the Reference key Authentication process.

## 2 Understanding How to Upload Documents

The Provider Portal application is used to upload confidential Medical and Pharmacy Records in support of claims selected for audit.

You must enter the Reference Key correctly and upload the Medical Records pertaining to the same Reference Key to process and attach to the EXL audit. The submission process begins after you receive a medical record request letter from EXL.

- **Medical Record / Invoice Upload**
  - You must upload the required medical records via EXL's Provider Portal application.
  - The medical records are required to be uploaded only in the **PDF** format.
  - **Medical Record Invoices** should be uploaded in the Portal by selecting **Invoice Records** from the **Select Document Type** drop-down list.
  - During upload, please note that **Medical Records** and **Invoices** must be added separately for the same Reference Key.
  - All Medical records uploaded should follow the following document naming convention:
    - PatientName\_AuditID.PDF (Preferred)
- **Pharmacy Record Upload**
  - Provider Portal supports **Pharmacy Record** upload in **JPG/JPEG** and **PDF** format.
  - **Pharmacy Records** uploaded in the Portal should have appropriate document type selected from the **Select Document Type** drop-down list.
- The Reference Key can be found in the footer section of medical record request and will be labeled as **Reference Key**.



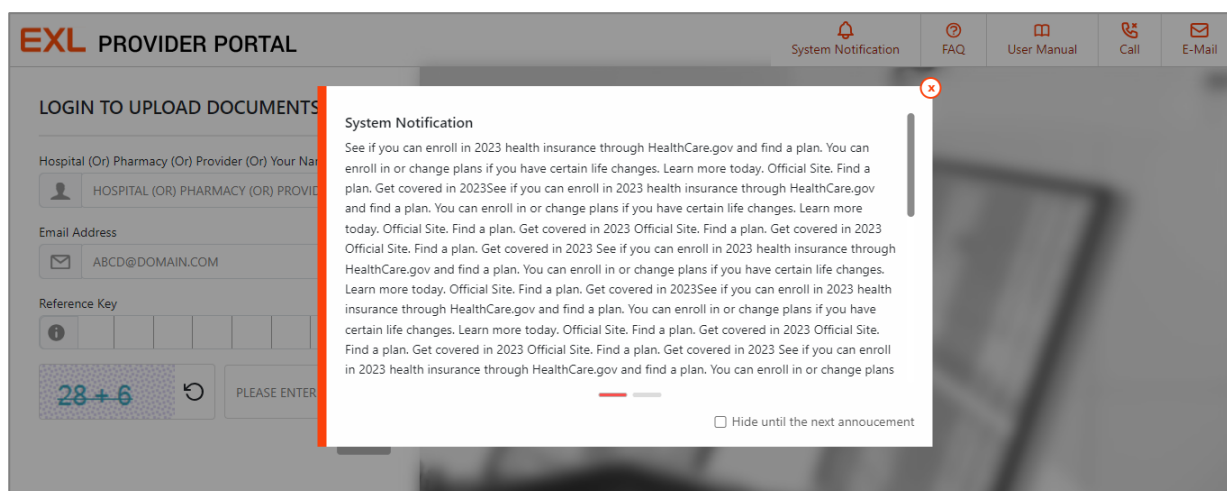
### 3 Accessing the Provider Portal

To access the Provider Portal application, follow these steps:

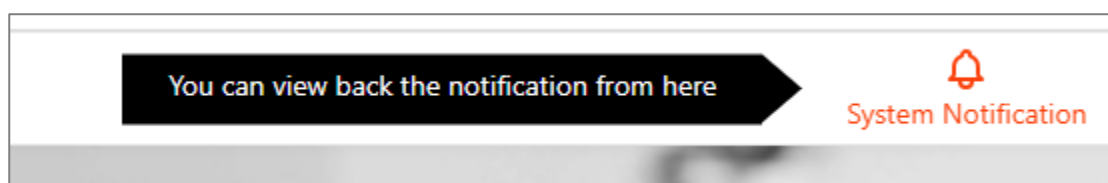
1. Type/copy-paste the following URL provided by the Admin into one of the compatible browsers (preferably, Google Chrome or Microsoft Edge).

<https://exlhealthproviderportal.exlservice.com>

The **Provider Portal** login page appears as shown in the following screenshot:



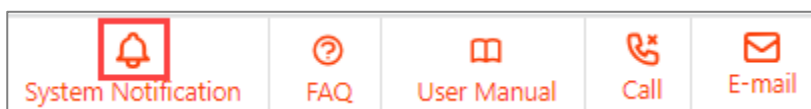
**Note:** If there are any system notification, it will be displayed on the screen. Click the **Hide until the next announcement** check box to hide. You can click the **System Notification** icon to view the message later.



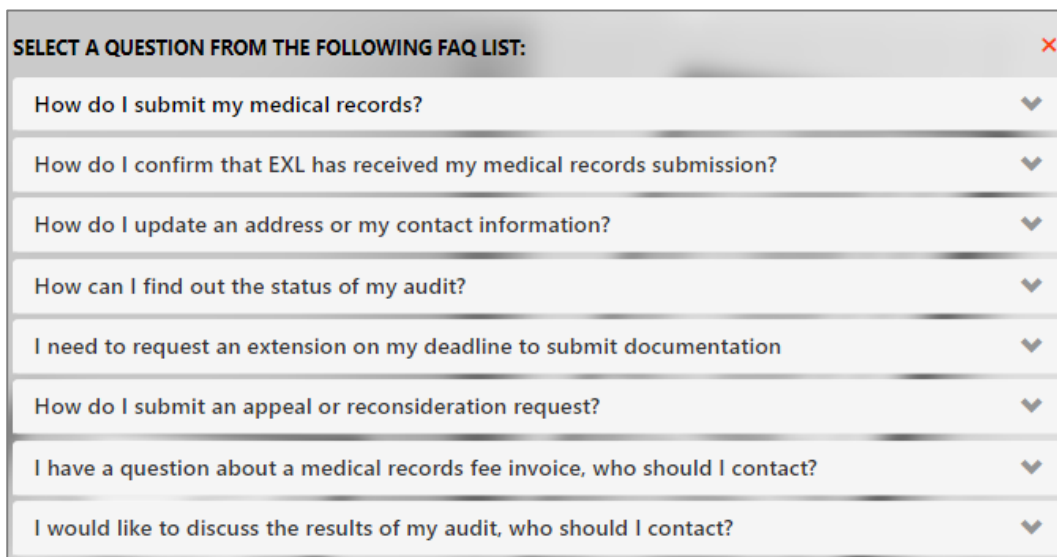
### 4 Understanding the Login Page

The **Provider Portal** login page consists of:

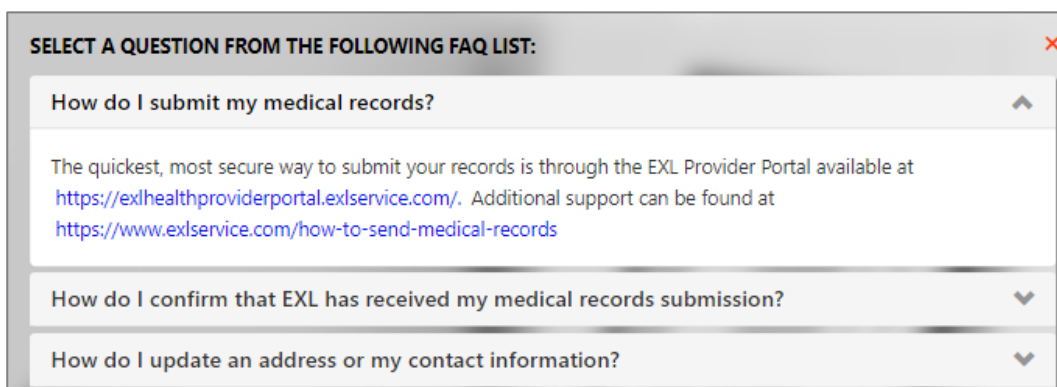
- **System Notification:** Displays system notifications, if any.



- **FAQ:** Displays a set of frequently asked questions.



Click the **v** icon to view the answer to the question.

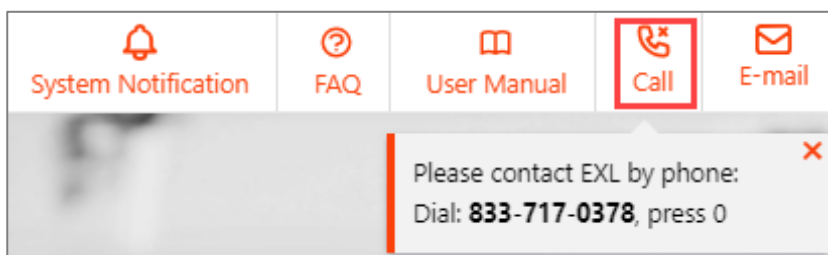


- **User Manual:** Provides instructions to Providers on how to utilize the Provider Portal application to simplify the medical record submission. To access the user guide, click the **User Manual** icon provided at the top right corner of the page as shown in the following screenshot:

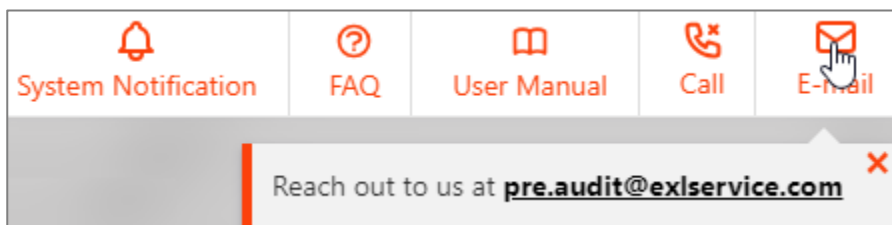


The Provider Portal user guide will get downloaded as a PDF file on your computer.

- **Call:** Displays the phone number to contact EXL support.



- **Email:** Displays the email ID to contact EXL support.



- **Chat:** Provides auto response to the provider using the Reference key Authentication process to avail any of the following requests. The detailed explanation is provided under the [Understanding Post Upload Process for Non-RUG and RUG Reference Keys](#) section.
  - [Audit Status](#)
  - [Portal Record Upload Status](#)
  - [Ask a Question](#)
  - [Contact Change Request](#)
  - [Re-activate Reference Key](#)
  - [MR Invoice Payment Status](#)

## 5 Logging into Provider Portal Application

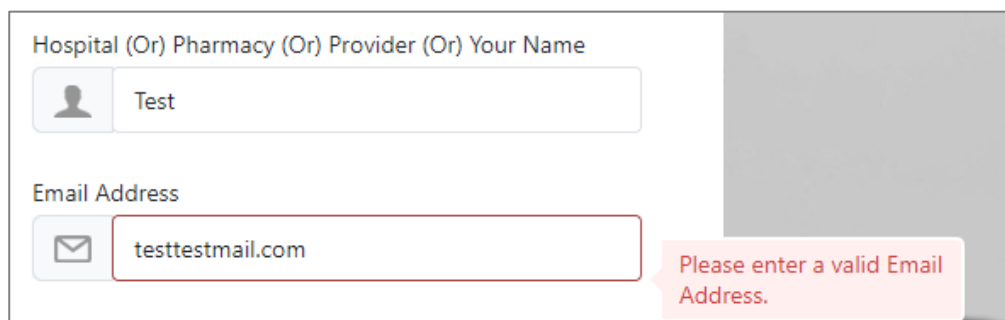
To login to the provider portal application, follow these steps:

1. Enter the username in the **Username** text box. The username can be any one of the following:
  - Hospital Name
  - Pharmacy Name
  - Provider Name
  - Third Party Vendor Name

If the username is less than three characters, the following message:

2. Enter a valid email ID required for communication related to the medical record upload in the **Email Address** text box.

If an email ID is entered in an incorrect format, the following message:

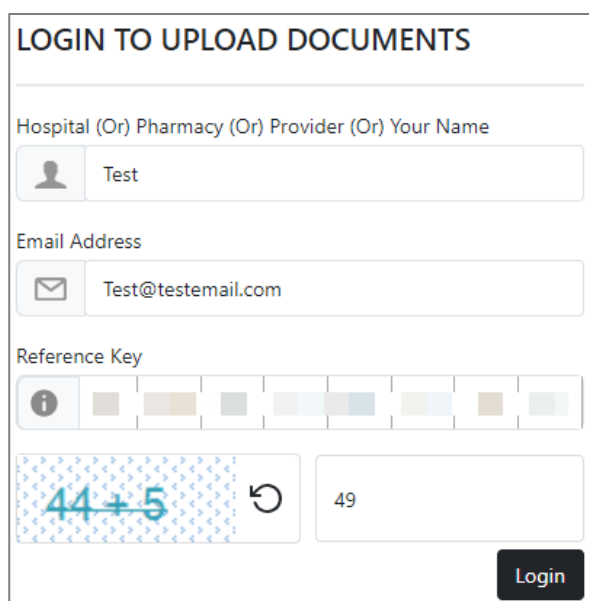


The screenshot shows a login form with the following fields:

- Hospital (Or) Pharmacy (Or) Provider (Or) Your Name:** A text box containing "Test".
- Email Address:** A text box containing "testtestmail.com".


A red error message box is displayed next to the Email Address field, stating: "Please enter a valid Email Address."

3. Enter the reference key in the **Reference Key** text box. The Reference Key can be found in the footer section of the Medical Record Letter Request. You must enter the Reference Key and upload the relevant medical records for the audit associated with this key. This step is essential for EXL to accurately process the claim(s). The Reference Key is a one-time authentication code that expires after the necessary transaction is completed. It remains valid for 120 days from the date it is generated. Once the key is used for authentication and document upload, it will expire.
4. Solve and enter the captcha value in the Captcha text box.



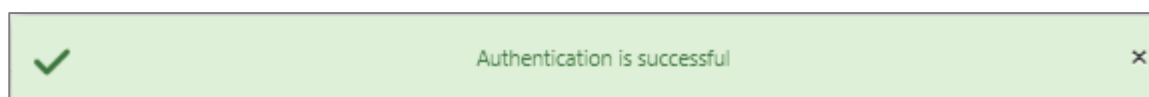
The screenshot shows the "LOGIN TO UPLOAD DOCUMENTS" form with the following fields:

- Hospital (Or) Pharmacy (Or) Provider (Or) Your Name:** A text box containing "Test".
- Email Address:** A text box containing "Test@testemail.com".
- Reference Key:** A row of colored squares (i, grey, yellow, grey, light blue, light blue, yellow, grey, light blue).
- Captcha:** A box showing the math problem "44 + 5" and a "49" input field.
- Login:** A button at the bottom right.

**Note:** You can refresh the captcha to solve a different captcha using the  icon. If an incorrect captcha is entered, the following message appears:

*Invalid Captcha, please try again.*

5. Click **Login**. On success, the following message appears:




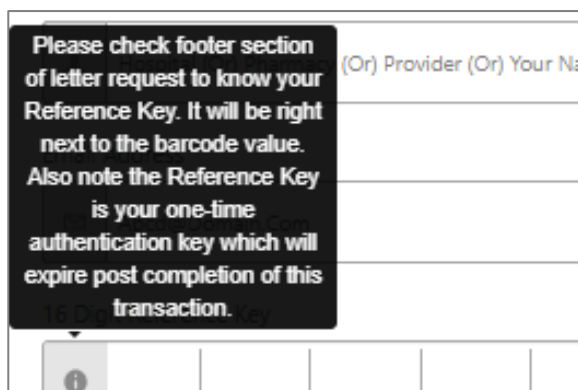
The screenshot shows a green success message box with a checkmark icon on the left and a close button (X) on the right. The text in the center reads: "Authentication is successful".



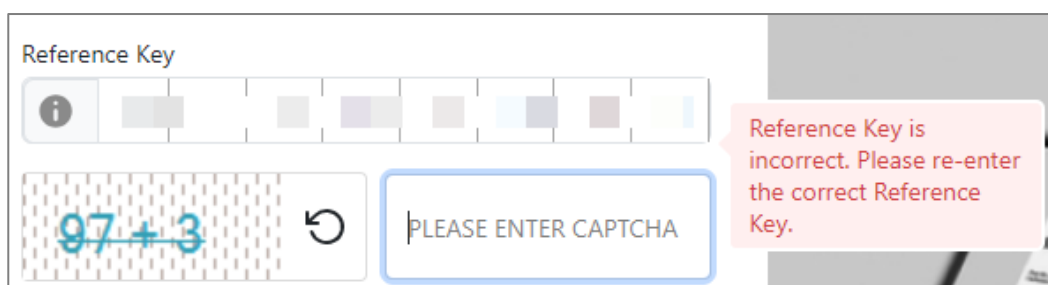
## Validations

When you click the **Login** button, the following validations will be performed:

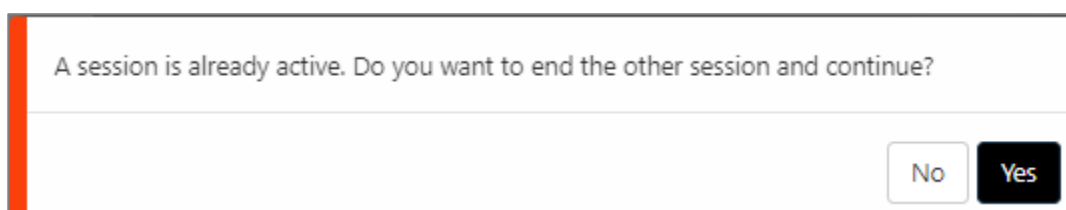
- An **Information**  icon is displayed in front of the **Reference Key** text box. On mouse hover, a tool tip appears and displays the location of the Reference Key within the medical record request letter.



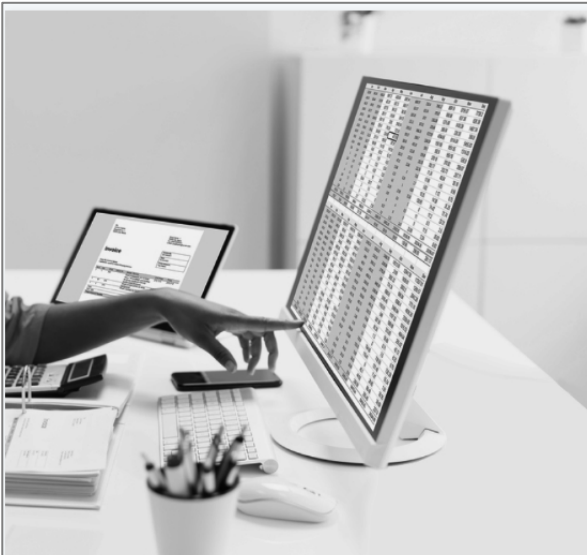
- If the entered Reference Key is not in the EXL system, the following message appears:



- If a session is running and you try to open another session in a different tab (within the same browser), after entering all the valid information, and click **Next**, the system displays the following warning message:



6. On the **Disclaimer** page, click the **Accept** button after you read the provided information.



## WELCOME TO EXL HEALTH'S PROVIDER PORTAL

The use of this portal is provided with the understanding that it will be used responsibly and confidentially for the sole purpose of uploading Medical and Pharmacy Records in support of claims selected for audit.

We advise you to enter the Reference Key correctly and upload the Medical Records pertaining to the same Reference Key to correctly process and attach to EXL audit.

### MEDICAL RECORD / INVOICE UPLOADS

- ✓ Provider Portal supports Medical Record upload in only PDF format.
- ✓ Medical Record Invoices should be uploaded in the Portal by selecting Invoice Records from the Select Document Type drop-down list.
  - > During upload, please note that Medical Records and Invoices must be added separately for the same Reference Key
- ✓ All Medical records uploaded here should follow the below document naming convention
  - > PatientName\_AuditID.PDF (Preferred)

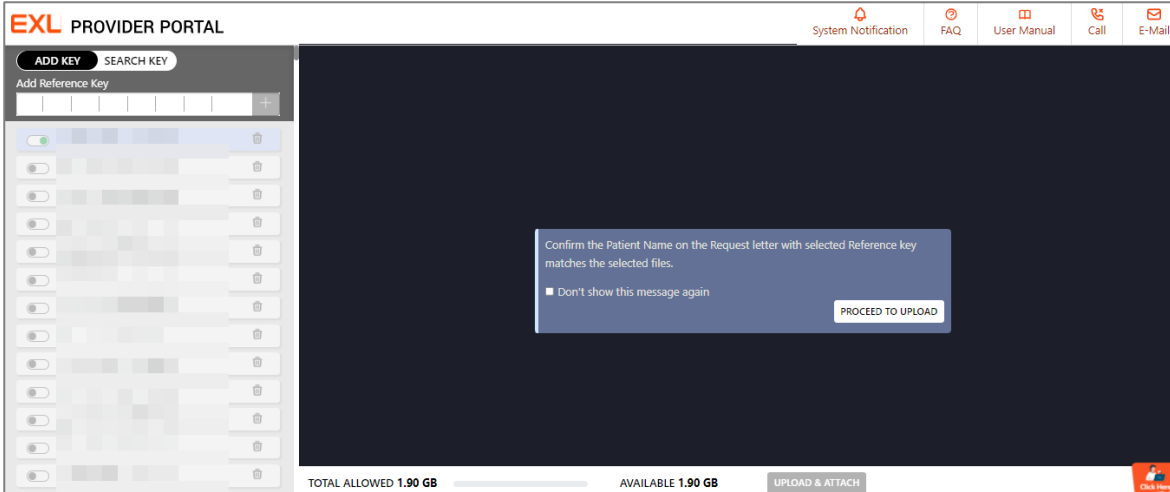
### PHARMACY RECORD UPLOADS

- ✓ Provider Portal supports Pharmacy Record upload in JPG/JPEG and PDF format.
- ✓ Pharmacy Records uploaded in the Portal should have appropriate document type selected from the Select Document Type drop-down list.

We will track all information and documents entered on this page for our security and quality purposes.

[DENY](#) [ACCEPT](#)

The **Attach and Upload** page appears with a banner message. If you do not want to view this message, select the **Don't show this message again** check box and click **Proceed to Upload**.



EXL PROVIDER PORTAL

System Notification FAQ User Manual Call E-Mail

ADD KEY SEARCH KEY

Add Reference Key

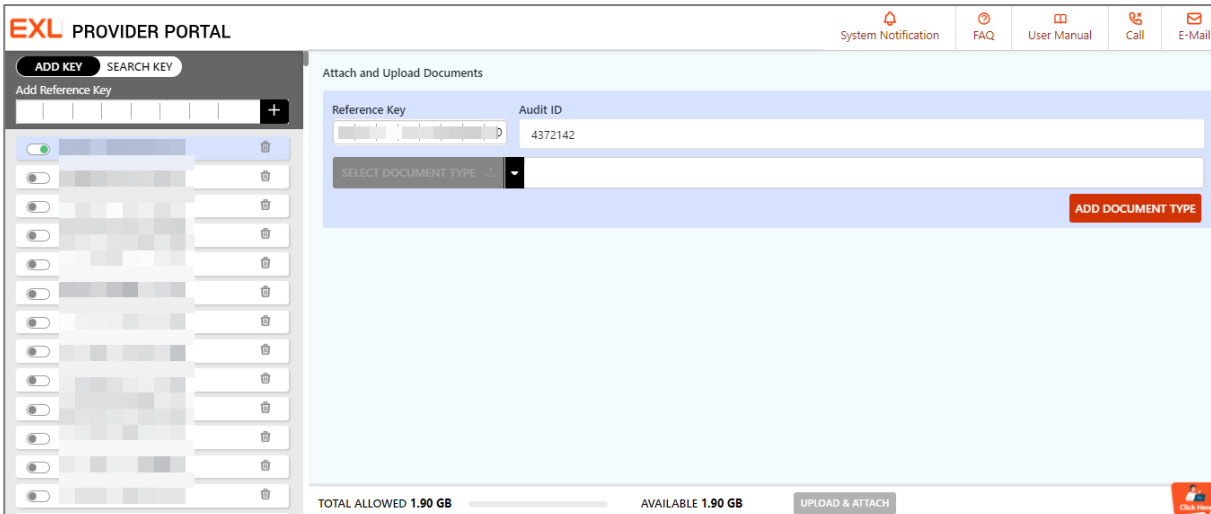
Confirm the Patient Name on the Request letter with selected Reference key matches the selected files.

☐ Don't show this message again

PROCEED TO UPLOAD

TOTAL ALLOWED 1.90 GB AVAILABLE 1.90 GB UPLOAD & ATTACH

The **Attach and Upload Documents** page appears:



EXL PROVIDER PORTAL

System Notification FAQ User Manual Call E-Mail

ADD KEY SEARCH KEY

Add Reference Key

Attach and Upload Documents

Reference Key Audit ID

4372142

SELECT DOCUMENT TYPE

ADD DOCUMENT TYPE

TOTAL ALLOWED 1.90 GB AVAILABLE 1.90 GB UPLOAD & ATTACH

## 5.1 Auto Reactivate Expired Reference Key

On the Home page, if you click the **Login** button and if the entered reference key is expired, you will have the ability to activate it without using the self-service chat feature. To do this, follow these steps:

1. Enter the username in the **Username** text box. The username can be any one of the following:
  - Hospital Name
  - Pharmacy Name
  - Provider Name
  - Third Party Vendor Name
2. Enter the reference key in the **Reference Key** text box.
3. Click the **Login** button. If the reference key has expired, an icon appears next to the Reference Key text box with a pop-out message. The **Login** button will be disabled.

**LOGIN TO UPLOAD DOCUMENTS**

Hospital (Or) Pharmacy (Or) Provider (Or) Your Name

Test

Email Address

Test@testemail.com

Reference Key


PLEASE ENTER CAPTCHA

Login

**Reactivate Reference Key**

The reference key has expired. To reactivate, click the **Reactivate** button

If you have any unused reference key, click **Close** button to proceed.  
For other options on how to send medical records, [Click here](#).

4. Click the  icon to reactivate the expired key. On successful reactivation. The following auto disappearing message appears:

Reference key reactivated. Please login to continue.

✓

Disclaimer:

Please note that reactivating the reference key does not change the date of any required documentation. Please refer to audit correspondence for due dates.



The reactivate icon will be changed.

5. Enter the captcha in the **Captcha** text box.
6. Click **Login** to attach and upload documents.

## 6 Understanding the Attach and Upload Documents Page

The **Attach and Upload Documents** page consists of


- Left pane:
  - Displays the entered reference key and all the related reference keys. The selected key will be highlighted in blue. You can click the toggle button to select a reference to attach and upload.

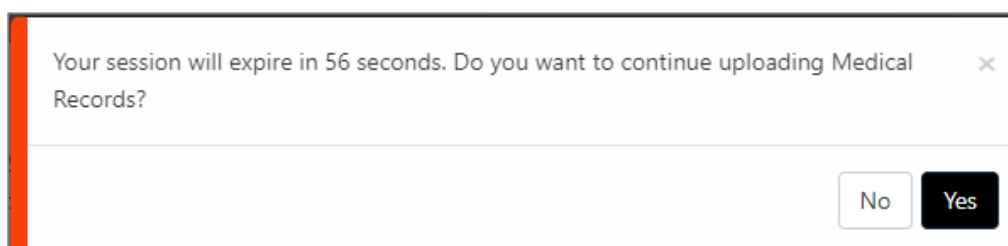
- Enables you to add more reference keys using the **Add Key** button. To do this, enter/copy-paste the reference key under the **Add Reference Key** box and click the  icon. After successful verification, the Reference Key will be added to the list.
- Enables you to search for a reference key from the list of reference keys.
- Enables you to delete the reference keys. Click the  icon to delete the Reference Key from the left pane. On click, the following message appears:



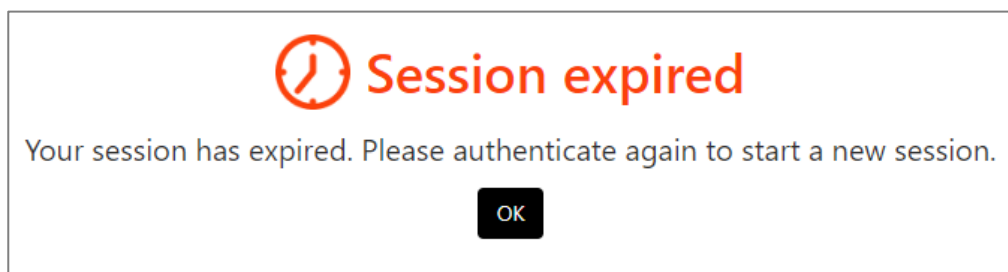
Click **Yes** to delete.

**Note:**

- For assistance at any point, you can click the Chat  icon.
- When the current user session becomes inactive for more than 20 minutes, the following message appear. You can select **Yes** to continue and **No** to log out of the application.



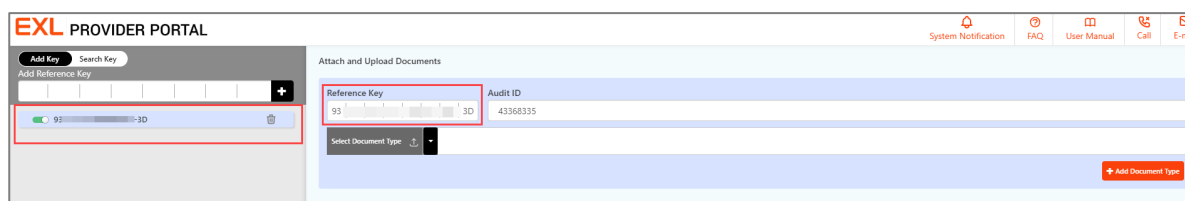
- If you miss the preceding message, the session will get expired. Click the **OK** button to navigate to the Login page.



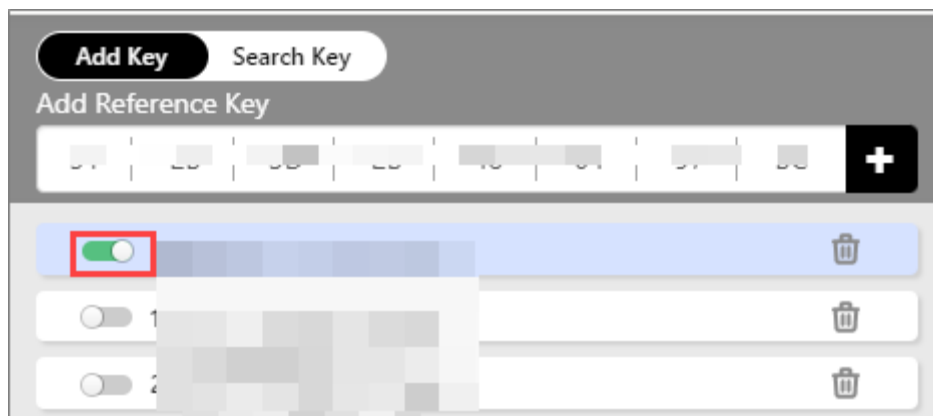
## 7 Uploading Medical Records into Provider Portal


You can upload one or more medical records for a single Reference Key or for multiple Reference Keys. To upload a medical record into the **Provider Portal** application on the **Attach and Upload Documents** page, follow these steps:

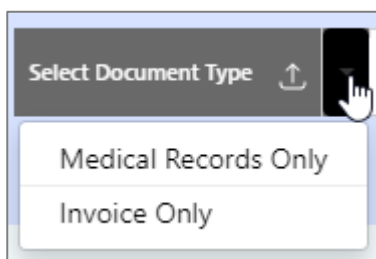
1. By default, the Reference Key entered on the **Provider Authentication** page will appear selected in the **Reference Key** text box and on the left pane as highlighted in the screenshot:



Alternately, you can toggle the reference key to green from the left pane or add a new key to upload and attach a document.

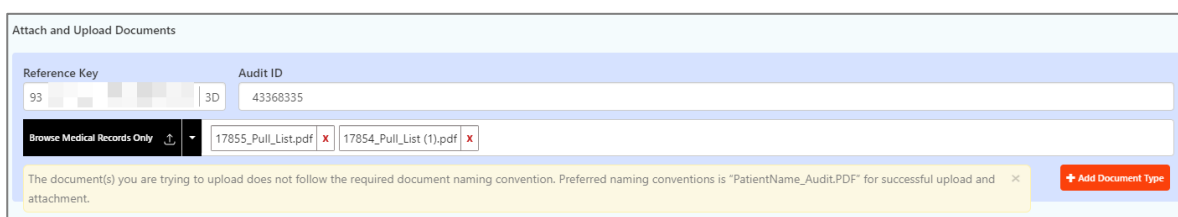


2. Click the  icon.
3. Select the document type. For medical record invoices, select **Invoice Records** from the drop-down list. For all other records, select the corresponding value from the drop-down list.



**Note:** During upload, Medical Records and Invoices must be added separately for the same Reference Key.

4. Click the **Browse <Selected Document Type>** button. Browse and select the PDF file you need to attach and click the **Open** button. The selected document(s) appears as shown in the following screenshot:

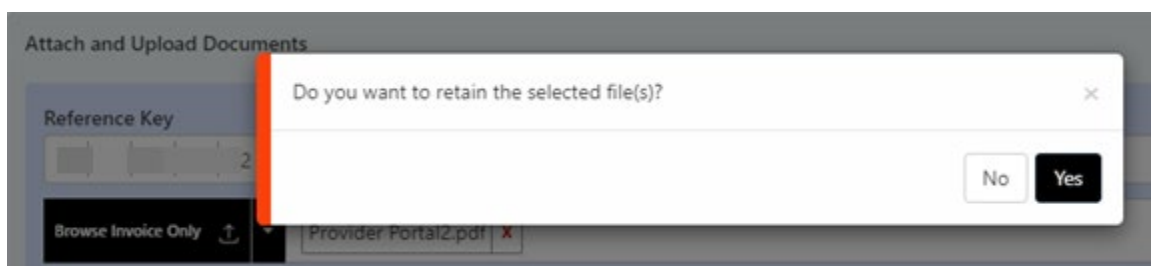


**Note:**

- If the attached documents are not as per the file naming convention, the warning message appears. However, this won't impact the upload and attach process.


The document(s) you are trying to upload does not follow the required document naming convention. Preferred naming convention is "PatientName\_Audit.PDF" for successful upload and attachment. ✕

- If you change the document type after uploading a document, the following message appears:



Click **Yes** to retain and **No** to upload a new document.

5. You can attach multiple documents to the same reference key. To do this, follow these steps:

- a. Click the  button. A new row will be added under the same reference key.



- b. Click the **Browse <Selected Document Type>** button. Browse and select the PDF file you need to attach and click the **Open** button. The selected document(s) appears as shown in the following screenshot:



6. You can also upload medical records pertaining to multiple reference keys. To do this, refer to the [Uploading Medical Records for Multiple Reference Keys](#) section.



- The **Upload & Attach** button will be enabled only after you upload at least one PDF document.
- You can upload up to 35 PDF documents pertaining to the same or different reference keys for a required transaction.
- The maximum number of Reference Keys allowed to add per transaction is 20.
- The **Total allowed size** of the PDF documents collectively per transaction is 1.9 GB. The **Currently occupied size** on the **Attach and Upload Documents** page refers to the current document size pertaining to the current transaction.

- While uploading the files in chunk, if any error occurs at the backend, the following error messages appears. The reference key used, will not expire and you will enable you to retry the upload process.

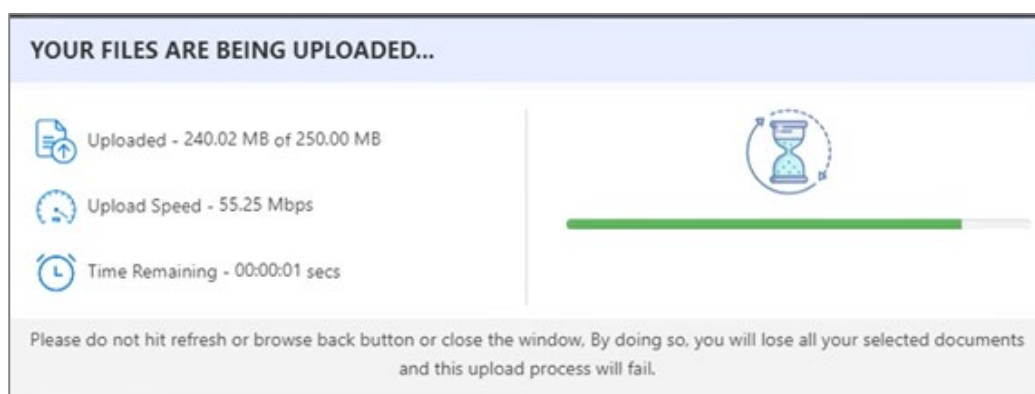


- Once you click the **Upload & Attach** button, you cannot go to the previous pages. If you do so, your current user session will get terminated.

7. Click the **Upload** button. The following message appears:



8. Click **Yes** to upload the document. A **Progress Bar** window appears and displays the progress of the medical record upload.




The following information will be displayed on the **Progress Bar** window:

- Percentage of the upload progress
- Uploaded:** Number of Megabytes (MB) of the document uploaded
- Speed:** Speed (in Kbps) of the documents being uploaded
- Time Remaining:** Time remaining (in seconds) for the upload to get completed

Once the medical/pharmacy records are uploaded, the following **Uploaded Files** pop-up message will be displayed as shown in the following screenshot:



UPLOADED FILES				
Documents are successfully uploaded to EXL Health. We will send you a confirmation email once all the uploaded documents are scanned successfully in our server.				
Reference Key	Audit Id	Document Name	Document size	Uploaded Date
	43368307	17855_Pull_List (1).pdf	173.88 KB	6/15/2023 12:56:30 PM

You can view the Reference Key, Audit ID (s), Original Document Name, Document Size and Uploaded Date and time in a tabular format.

This confirms that the document upload is successful and will be moved to the EXLMine server for further scanning. Post scanning, EXL will send an email regarding the status of the scan to your registered email address.

If the provider fails to follow the upload instructions before uploading, it will be manually reviewed by the mail room team and will be attached to the audit. To attach the record manually, it will take at least three to four weeks.

**Note:** There are chances that the e-mail may go to spam. In such cases, you can check your junk mail folder for any emails sent from the EXL domain. To move the email to your Inbox and to receive all the future emails from EXL domain to your Inbox, right-click the email from the **Junk** folder and click **Not Junk**.

- Click **Download** to download the uploaded files in a PDF format.
- Click **Print** to print the uploaded files.
- Click **Authenticate and Upload** to refresh the current session on the **Provider Portal** application (If you want to upload more documents for different Reference Keys) and the following message appears:

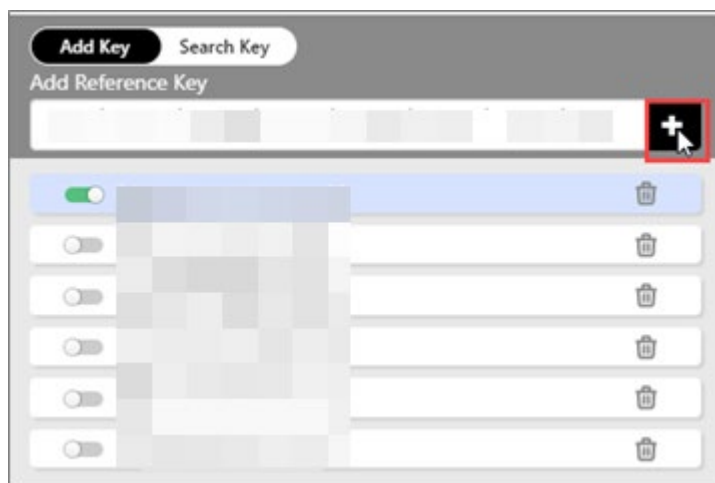
Your current session will be refreshed. Do you want to Download or Print the uploaded document information before starting a new session?

- Click **Yes** to refresh the current session and the **Provider Authentication** page appears.

## 7.1 Uploading Medical/Pharmacy Records for Multiple Reference Keys

To upload medical/pharmacy records pertaining to multiple reference keys, follow these steps:

1. Toggle to **Add Key**.
2. Enter or copy-paste the reference key in the provided text boxes.



- Click the **Add Reference Key** (+) icon. The newly added reference key will be added to the left pane and will be selected. The same will appear on the right pane for document upload and attach as shown in the following screenshot:



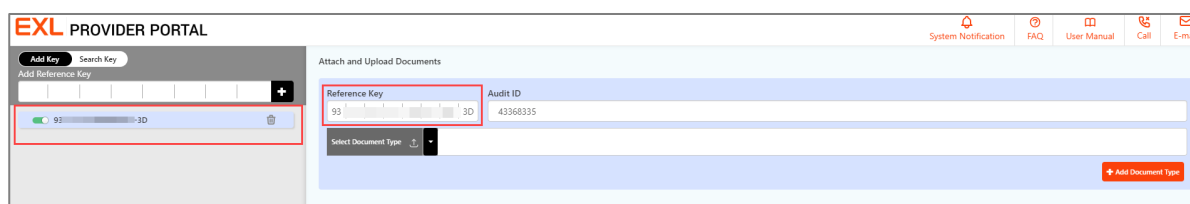
- Once you finish attaching the required medical/pharmacy records, follow the steps mentioned from step 2.

## 8 Uploading Pharmacy Records


You can upload one or more pharmacy records for a single Reference Key or for multiple Reference Keys.

To upload a pharmacy record into the **Provider Portal** application, follow these steps:

- By default, the Reference Key entered on the **Provider Authentication** page will appear selected in the **Reference Key** text box and on the left pane as highlighted in the screenshot:



Alternately, you can toggle the reference key to green from the left pane or add a new key to upload and attach a document.

2. Click the  icon.
3. Select the document type.


**Note:** During upload, each document type must be added separately for the same Reference Key.

4. Click the **Browse <Selected Document Type>** button. Browse and select the PDF/JPEG file you need to attach and click the **Open** button. The selected document(s) get added to the selected document type. You can attach multiple documents to the same reference key. Click the **Add Document Type** button and repeat the steps.


5. Click the **Upload & Attach** button. The following message appears:

6. Click **Yes**. The file upload process will start.


**YOUR FILES ARE BEING UPLOADED...**




Uploaded - 168.05 KB of 523.33 KB



Upload Speed - 0.00 Kbps



Time Remaining - 990965:19:18 secs



Please do not hit refresh or browse back button or close the window, By doing so, you will lose all your selected documents and this upload process will fail.

7. On completion, the list of uploaded files, its size and time and date of upload will be displayed in a grid format as shown in the following screenshot:

**UPLOADED FILES**

Documents are successfully uploaded to EXL Health. We will send you a confirmation email once all the uploaded documents are scanned successfully in our server.

Reference Key	Audit ID	Document Name	Document Size	Uploaded Date
		Provider Portal.pdf	167.57 KB	6/23/2023 3:56:30 PM
		Provider Portal1.pdf	185.44 KB	6/23/2023 3:56:31 PM
		2023-06-06_22-26-01.jpg	20.61 KB	6/23/2023 3:56:32 PM
		Provider Portal2.pdf	127.46 KB	6/23/2023 3:56:33 PM

Authenticate and Upload Download Print

8. Click **Download** to download the list of uploaded files into your local computer.
9. Click **Print** to print the list of uploaded files.
10. Click **Authenticate and Upload** to refresh the current session on the **Provider Portal** application (If you want to upload more documents for different Reference Keys) and the following message appears:

Your current session will be refreshed. Do you want to Download or Print the uploaded document information before starting a new session? ×

No Yes

11. Click **Yes** to refresh the current session and the **Provider Authentication** page appears.
12. You can also upload pharmacy records pertaining to multiple reference keys. To do this, refer to the [Uploading Medical/Pharmacy Records for Multiple Reference Keys](#) section.

## 9 Understanding the Post Upload Process

After you upload the PDF documents on the **Provider Portal** application, the documents move to the EXL's system. An email will be sent to the registered email address upon successful completion of the scanning of the uploaded documents. Sample: Documents received successfully

Hi [REDACTED],

The status of the documents uploaded by you on 06/15/2023 - 03:26 EST is provided below.

Document Name	Upload Status	Uploaded with Reference Key	Audit ID	Document Size	Remark
17855_Pull_List (1).pdf	Successful	[REDACTED]	43368307	173.879 KB	Document Received successfully

If any of the document upload status is "Failed", Please follow the below steps to re-upload the document.

1. Ensure that the documents are not password protected or corrupted and is virus free.
2. Go to the Provider Portal website. [REDACTED]
3. Authenticate yourself using the Reference key: [REDACTED]
4. Navigate to the Medical/Pharmacy Record Upload Page and enter the Reference Key pertaining to the "Failed" document.
5. Attach the documents and click on Upload button.

**Note:** Successful upload does not signify that we have received all the required Medical/Pharmacy Records from you for a claim. Hence, we may get back to you in case of any discrepancy found.

- After you upload the PDF documents on the **Provider Portal** application, the documents move to the EXL's system. During the scan, if any of the following instances are found, the scanning will fail, and an email will be sent to the registered email address:
  - Corrupted document
  - Document infected with virus
  - Password protected document
  - Incomplete document
  - Encrypted document
  - Document process failed due to unidentified reason

Sample: Document process failed due to unidentified reason

From: Exlminetest <[REDACTED]>  
 Sent: Friday, June 9, 2023 4:10 PM  
 To: [REDACTED]  
 Subject: EXL Health - Provider Portal - Medical/Pharmacy Record Upload Status is Unsuccessful

\*\*\*This is an auto generated email. Please do not reply to this email.\*\*\*

Hi [REDACTED]

The status of the documents uploaded by you on 06/09/2023 - 06:30 EST is provided below.

Document Name	Upload Status	Uploaded with Reference Key	Audit ID	Document Size	Remark
MuraliS_4372000.pdf	Failed	[REDACTED]	4336321	224.768 KB	Document is uploaded along with other failed File(s)
MuraliL_4372001.pdf	Failed	[REDACTED]	4336321	1.643 GB	Document is Password Protected or Corrupted

If any of the document upload status is "Failed", Please follow the below steps to re-upload the document.

1. Ensure that the documents are not password protected or corrupted and is virus free.
2. Go to the Provider Portal website. [REDACTED]
3. Authenticate yourself using the Reference key: [REDACTED] 7
4. Navigate to the Medical/Pharmacy Record Upload Page and enter the Reference Key pertaining to the "Failed" document.
5. Attach the documents and click on Upload button.

**Note:** Successful upload does not signify that we have received all the required Medical/Pharmacy Records from you for a claim. Hence, we may get back to you in case of any discrepancy found.

Thank You,  
 EXL Health Team

- The email will contain the consolidated list of medical record file upload status and remarks as shown in the following sample screenshot:

Sample2: Corrupted/Password Protected documents

From: Edminetest  
Sent: Tuesday, June 13, 2023 7:08 PM  
To: [REDACTED]  
Subject: EXL Health - Provider Portal - Medical/Pharmacy Record Upload Status is Partially Successful

\*\*\*This is an auto generated email. Please do not reply to this email.\*\*\*

The status of the documents uploaded by you on 06/13/2023 - 09:37 EST is provided below.

Document Name	Upload Status	Uploaded with Reference Key	Audit ID	Document Size	Remark
test_43355543.pdf	Successful	[REDACTED]	16630	97.575 MB	Document Received successfully
response when status 2 3.jpeg	Successful	[REDACTED]	16630	275.016 KB	Document Received successfully
4163_Medical Records.pdf	Successful	[REDACTED]	16630	257.472 MB	Document Received successfully
test_4344576.pdf	Failed	[REDACTED]	16630	774.383 MB	Document is Password Protected or Corrupted

If any of the document upload status is "Failed", Please follow the below steps to re-upload the document.

1. Ensure that the documents are not password protected or corrupted and is virus free.
2. Go to the Provider Portal website: [REDACTED]
3. Authenticate yourself using the Reference key: 01 [REDACTED] 01
4. Navigate to the Medical/Pharmacy Record Upload Page and enter the Reference Key pertaining to the "Failed" document.
5. Attach the documents and click on Upload button.

**Note:** Successful upload does not signify that we have received all the required Medical/Pharmacy Records from you for a claim. Hence, we may get back to you in case of any discrepancy found.

Thank You,  
EXL Health Team

- If the uploaded document doesn't have a barcode on the first page, no email will be sent, and the letter will be sent to the mailroom for scanning manually. The Mailroom team will add barcode to the document and will allow the job to process.

## 10 Understanding Post Upload Process for Non-RUG and RUG Reference Keys

- You can combine files for the same non-RUG Reference Key with relevant barcode. To do this, follow these steps:
  - Attach more than one file with relevant barcode.
  - Check the **Check this box to confirm combining of the uploaded files for proper routing** check box on the **Attach File** pop-up.
  - Click **Proceed**.
  - Click **Upload**. The Mailroom users will be able to view that the files uploaded are combined into a single file.
- You cannot combine the files for the same non-RUG Reference Key with relevant barcode. To do this, follow these steps:
  - Attach more than one file with relevant barcode.

- b. Uncheck the **Check this box to confirm combining of the uploaded files for proper routing** check box on the **Attach File** pop-up.
  - c. Click **Proceed**.
  - d. Click **Upload**. The Mailroom users will be able to view that the files uploaded are not combined into a single file, instead the individual files with the barcode matching are attached to the required audits.
- You can combine files for the same non-RUG Reference Key with irrelevant barcode. To do this, follow these steps:
  - a. Attach more than one file with irrelevant barcode.
  - b. Check the **Check this box to confirm combining of the uploaded files for proper routing** check box on the **Attach File** pop-up.
  - c. Click **Proceed**.
  - d. Click **Upload**. The Mailroom users will be able to view that the files uploaded are combined into a single file. The combined file is moved to the exception queue, as the barcode does not match.
- You can attach single file for a RUG Reference Key with relevant barcode. To do this, follow these steps:
  - a. Attach just one file with relevant barcode.
  - b. Click **Proceed**.
  - c. Click **Upload**. The mailroom users will be able to view the file attached to the respective audit. In case, the attached file does not have a relevant barcode then the file will move to the exception queue.
- You can attach more than one file for a RUG Reference Key with relevant barcode. To do this, follow these steps:
  - a. Attach more than one file with relevant barcode.
  - b. Click **Proceed**.
  - c. Click **Upload**. All the files attached will move to the exception queue if there are more than one files for RUG program.


## 11 Understanding the Provider Portal Chat Service

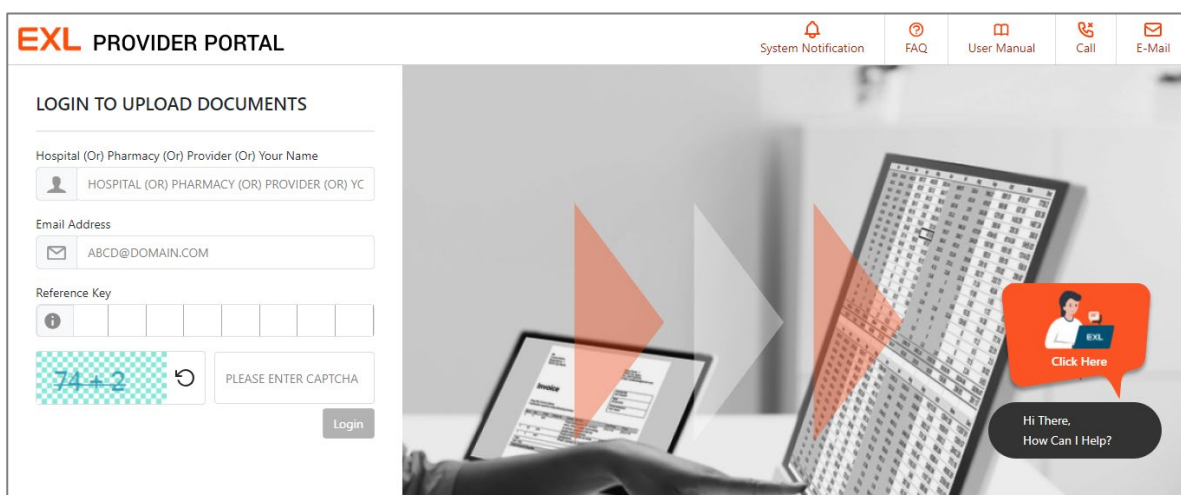
The Portal chat service provides auto response to the provider using the Reference key Authentication process to avail any of the following requests:

- [Audit Status](#)

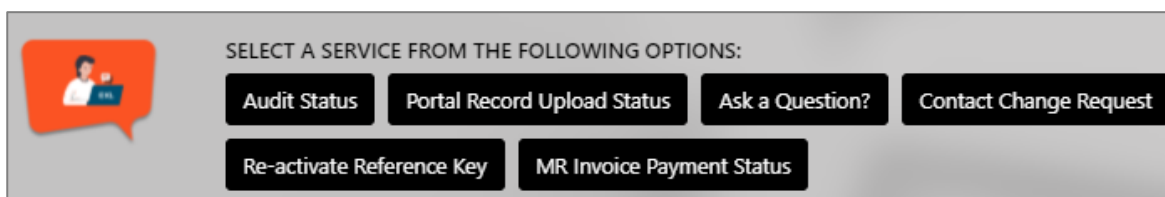
- [Portal Record Upload Status](#)
- [Queries](#)
- [Contact Change Request](#)
- [Re-activate Reference Key](#)
- [MR Invoice Payment Status](#)

To avail the chat service, follow these steps:

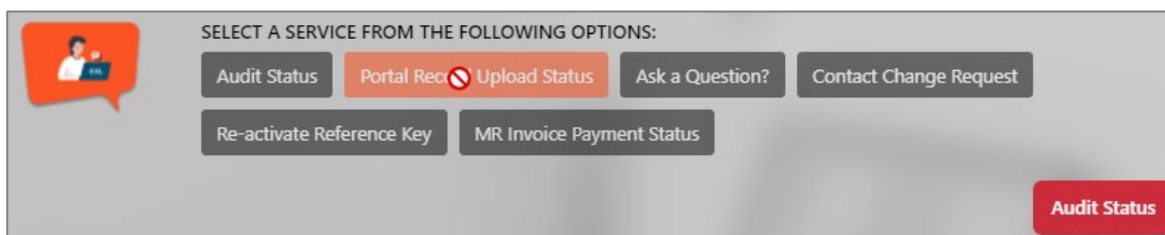
1. Click the  icon on the **Provider Portal** login page or from the **Attach and Upload Documents** page.



The following page appears:



2. Click the required service from the provided options. The selected service will be highlighted, and the other options will not be available until you complete the selected service.



## 11.1 Audit Status

The Provider Portal Audit Status will display the standard status so that the Provider can obtain detailed information about the audit based on the entered Reference Key reducing the call/email enquiries.



If you select **Audit Status** from the available service options, follow these steps:

1. Enter corresponding name in the **Hospital or Pharmacy or Provider or Your Name** text box.
2. Enter the email id in the **Email ID** text box.
3. Enter or copy-paste the Reference Key in the **Reference Key** textbox.

SELECT A SERVICE FROM THE FOLLOWING OPTIONS:

Audit Status Portal Record Upload Status Ask a Question? Contact Change Request

Re-activate Reference Key MR Invoice Payment Status

**Audit Status**

Name: test

Email: Test@testemail.com

Captcha: 84+8

Submit

4. Enter the captcha in the **Captcha** text box.
5. Click the **Submit** button. On successful authentication, the audit status will be displayed.

User Authenticated

The submitted dispute is currently under review, please allow sufficient time for the audit to be completed and to receive an audit outcome notification letter and report, if warranted. The report will be sent to the location specified using the preferred

**Disclaimer:**  
Audit status information is updated frequently throughout the audit process. For specific audit results, findings explanations, clinical notes and additional instructions please refer to the detail guidance provided in the correspondence that you will or have already received. If you require more assistance please contact us via the EXL Provider Portal's "Ask a Question" feature. Alternatively, please email or call EXL Health using the contact information provided on your audit correspondence.

HAVE WE ANSWERED YOUR QUERY?

Yes No

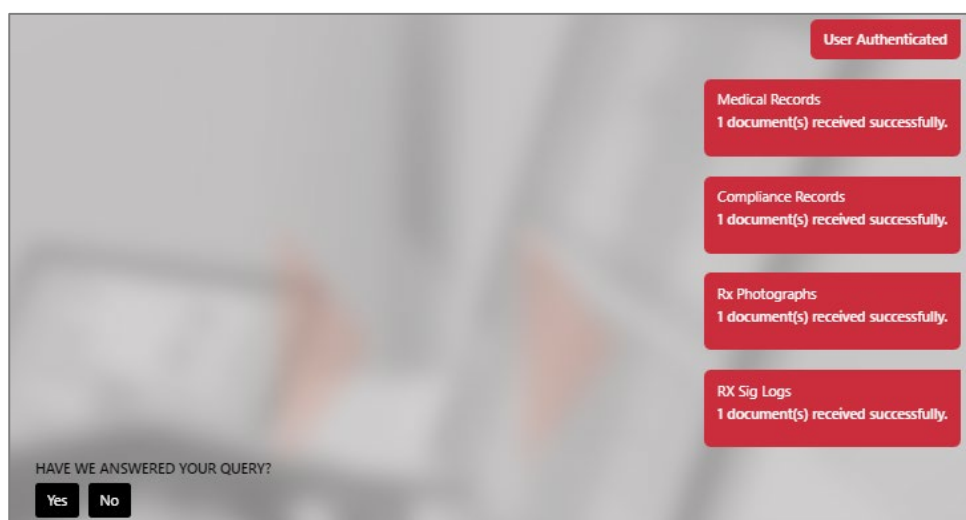
**Note:** If no audit status is available, the following generic message will be displayed:

*The system is unable to provide an update. Please try re-entering your request. If you continue to see this message, please contact EXL Services to complete your request at either [pre.audit@exlservice.com](mailto:pre.audit@exlservice.com) or 833-717-0378, option 0. Thank you.*

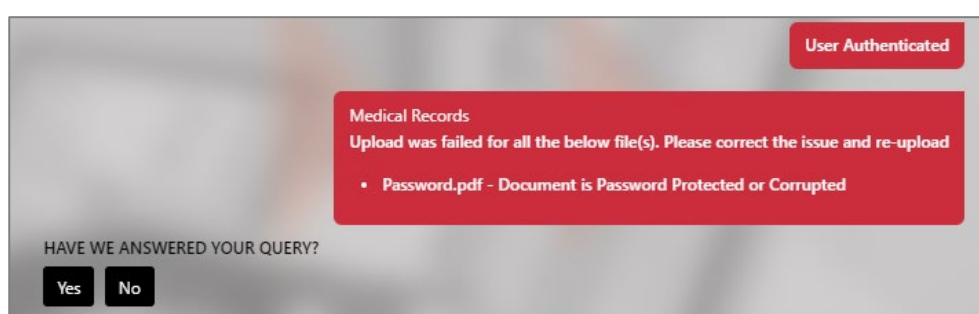
## 11.2 Portal Record Upload Status

If you select **Portal Record Upload Status** from the available service options, follow these steps:

1. Enter corresponding name in the **Hospital or Pharmacy or Provider or Your Name** text box.
2. Enter the email id in the **Email ID** text box.
3. Enter or copy-paste the Reference Key in the **Reference Key** textbox.
4. Enter the captcha in the **Captcha** text box.
5. Click **Submit**. The record upload status for the entered reference key will be displayed as shown in the following screenshot:



If there is any issue, the upload failed message will be displayed as shown in the following screenshot:



6. After you receive the status, **Have We Answered the Query?** message appears. If your query is answered, click the **Yes** button, and go to step [6](#) . If you click **No**, the following message appears:

HAVE WE ANSWERED YOUR QUERY?

Yes No

No

Please contact EXL using the phone number provided on your medical records request and select the menu option 1 to be connected to the Medical Records department or email your question to [EXL.medrec@exlservice.com](mailto:EXL.medrec@exlservice.com)

DO YOU WISH TO CONTINUE?

Yes No

7. If the query is answered and if you click **Yes**, **Do you Wish to continue?** Message appears. If you wish to continue, click the **Yes** button. Otherwise, click the **No** button.
8. If you wish to continue, click the **Yes** button.

DO YOU WISH TO CONTINUE?

Yes No

Yes

SELECT A SERVICE FROM THE FOLLOWING OPTIONS:

Audit Status Portal Record Upload Status Ask a Question? Contact Change Request

Re-activate Reference Key MR Invoice Payment Status

9. Select a service, the previously entered username and email id will be displayed and you will be prompted to enter the new reference key.
10. If you click **No**, the following message appears, and the chat service will be closed.

DO YOU WISH TO CONTINUE?

Yes No

No

Thanks for contacting EXL Health

## 11.3 Ask a Question?

If you select **Ask a Question?** from the available service options, follow these steps:

1. Enter corresponding name in the **Hospital or Pharmacy or Provider or Your Name** text box.
2. Enter the email id in the **Email ID** text box.
3. Enter or copy-paste the Reference Key in the **Reference Key** textbox.
4. Enter the captcha in the **Captcha** text box.
5. Click the **Submit** button.
6. After authentication, select the type of query from the list of available queries.

7. You can select,
- Appeal Query
  - Clinical Query
  - Invoice Query
  - Other

A new service request will be created, and the service number will be generated as shown in the following screenshot:

The screenshot displays a web form titled "WHAT TYPE OF QUERY DO YOU HAVE?". It features four buttons: "Appeal Query", "Clinical/Coding Query", "Invoice Query", and "Other". The "Clinical/Coding Query" button is highlighted in red. Below the buttons is a text input field with the placeholder "Please enter the query here" and the text "clinical query" entered. A "Submit" button is located to the right of the input field. A red confirmation message at the bottom states: "A new service request has been created, Id 737829. Please allow up to 2 business days for a response." At the bottom of the form, there is a section titled "HAVE WE ANSWERED YOUR QUERY?" with "Yes" and "No" buttons.

**Note:** Once the query has been answered, the service request will be closed via the call log and an email confirmation will be sent to the Provider that the request has been completed, including the query and the response.

## 11.4 Contact Change Request

This chat feature helps the Providers with the ability to raise a request to change the contact information within the Provider Portal reducing the support phone calls. These requests will be viewed and addressed by the Operations Service team via the Provider Request call log.

If you select **Contact Change Request** from the available service options, follow these steps:

1. Enter corresponding name in the **Hospital or Pharmacy or Provider or Your Name** text box.
2. Enter the email id in the **Email ID** text box.
3. Enter or copy-paste the Reference Key in the **Reference Key** textbox.
4. Enter the captcha in the **Captcha** text box.
5. Click **Submit**. On successful validation, the list of addresses associated with the entered reference key will be displayed.

The screenshot shows a user authentication form with the following fields: Username (test), Email (Test@testemail.com), and a CAPTCHA (61+7=68). A 'Submit' button is at the bottom right. A red banner at the top right says 'User Authenticated'. Below the form, a dark modal titled 'Available Addresses' is open, showing a single address entry: 'Address - Dispute' with details: Address: sad Address2 Dupute asd, asd 1213, City: asd, Phone:, Fax:, and Email: sads@gmail.com. A 'Change Contact' button is at the bottom right of the modal.

6. Select the required address.

This is a closer view of the 'Available Addresses' modal. The address entry 'Address - Dispute' is selected, indicated by a red checkmark in the top right corner. The details are: Address: sad Address2 Dupute asd, asd 1213, City: asd, Phone:, Fax:, and Email: sads@gmail.com. The 'Change Contact' button is highlighted in orange at the bottom right.

7. Click the **Change Contact** button.
8. Enter the tax Id or NPI details in **Tax ID** and **NPI ID** text box. You can enter either the Tax ID or NPI or both. This is a mandatory field.

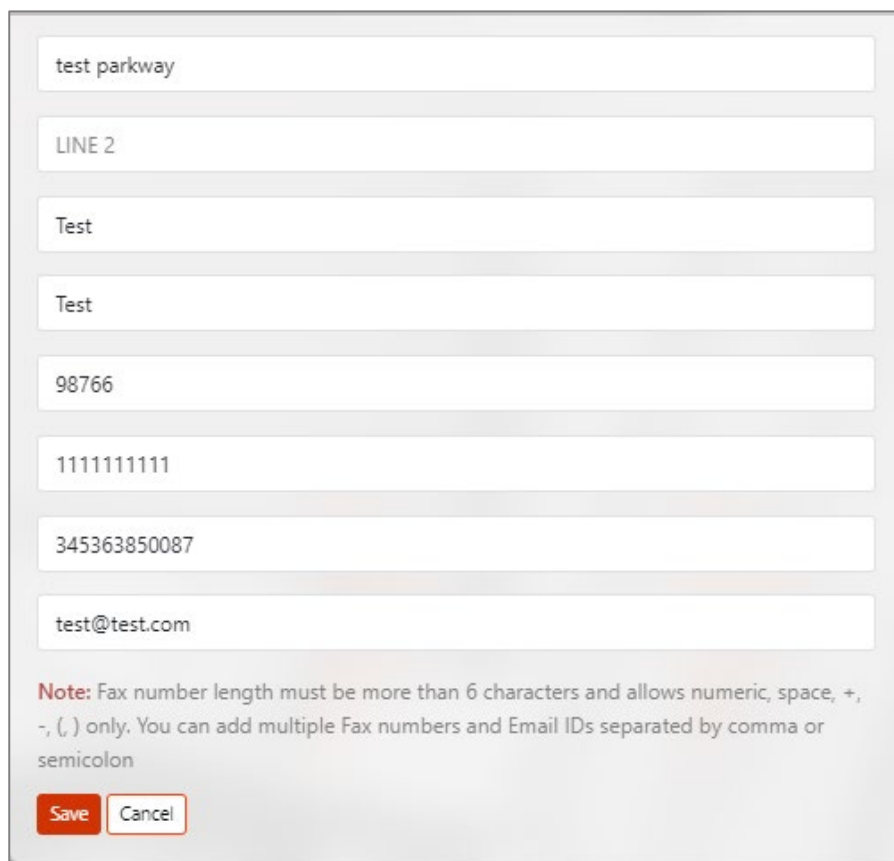
The screenshot shows a form titled 'Enter either Tax ID or NPI'. It has two input fields: '1231123' in the 'TAX ID' field and 'NPI' in the 'NPI' field. A 'Submit' button is at the bottom left.

**Note:** If you click **Submit** without entering the tax ID or NPI, the following message appears:

This screenshot shows the same 'Enter either Tax ID or NPI' form, but with an error message. The 'TAX ID' and 'NPI' fields are empty. A red error message box on the right says 'Enter either Tax ID or NPI'. A hand cursor is pointing at the 'Submit' button.

9. Click the **Submit** button. The **Edit Selected Contact** window appears.

10. Enter the address details in the respective fields.



test parkway

LINE 2

Test

Test

98766

1111111111

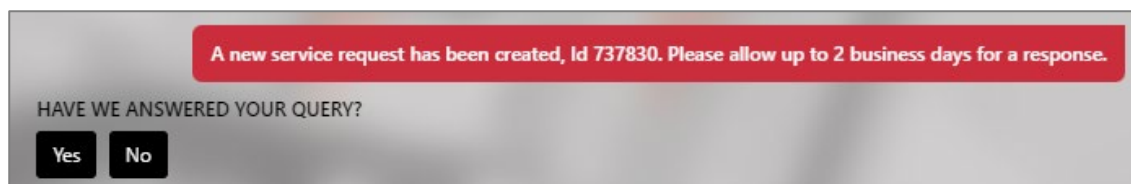
345363850087

test@test.com

**Note:** Fax number length must be more than 6 characters and allows numeric, space, +, -, (, ) only. You can add multiple Fax numbers and Email IDs separated by comma or semicolon

**Save** **Cancel**

11. Click the **Save** button. A new service request will be created.



A new service request has been created, Id 737830. Please allow up to 2 business days for a response.

HAVE WE ANSWERED YOUR QUERY?

**Yes** **No**

**Note:**

- If you click **Cancel**, you will be prompted if you want to continue other chat options or to exit the chat.
- Once the request is created and accepted, it will be visible in the call log and addressed/facilitated by an agent who has write access in the Provider Manager module while adhering to the governance process. Once the contact details are updated, an email confirmation will be sent to the provider that the contact has been changed as requested. This will reduce any further support requests/enquiries and can be useful as a reference to the provider.
- If you click **Save** without entering any mandatory field value, the following message appears:

Edit Selected Contact

LINE 1

LINE 2

STATE CITY ZIP

PHONE FAX

EMAIL

**Note:** Fax number length must be more than 6 characters and allows numeric, space, +, -, (, ) only. You can add multiple Fax numbers and Email IDs separated by comma or semicolon

Save Cancel

Highlighted fields are mandatory

- If you enter any alphabets in the phone number, or if the fax number less than six characters, or if the email ID is in an incorrect format, an error message will appear under the respective text box as shown in the following screenshot:

Edit Selected Contact

100 eagle Ridge Dr S

LINE 2

WA Renton 98055

123abc 1233

Please enter a valid phone number Please enter a valid fax number

abc

Please enter a valid email ID

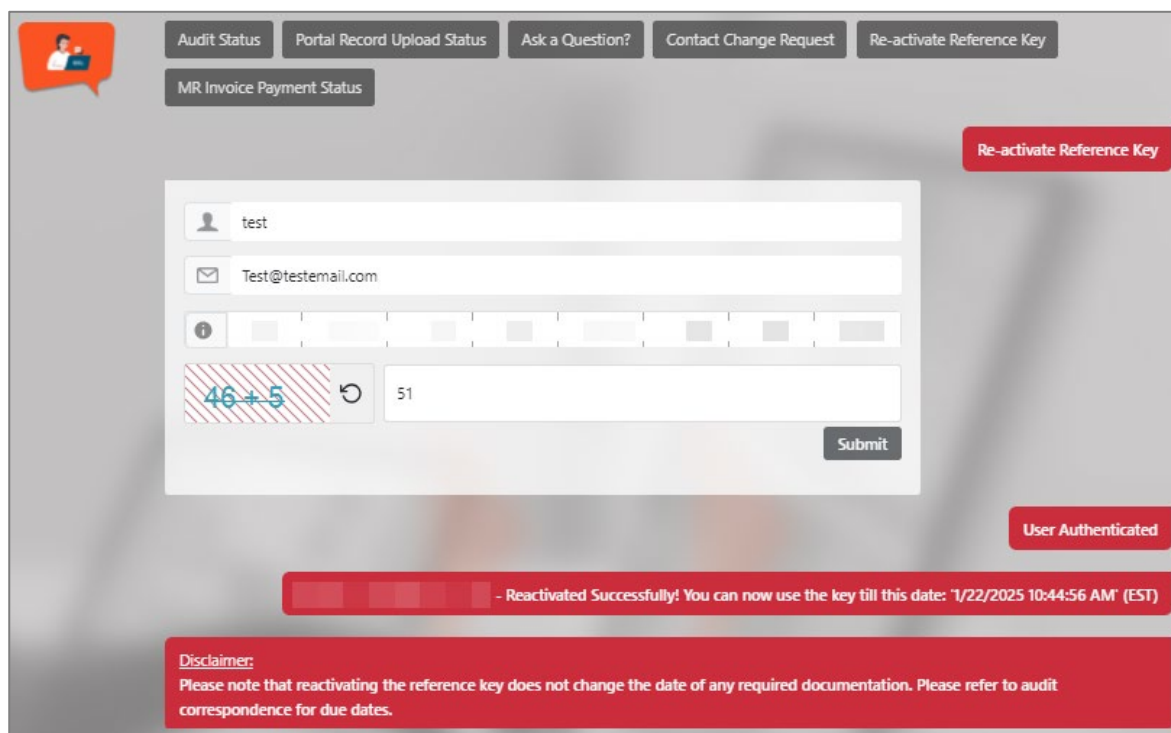
**Note:** Fax number length must be more than 6 characters and allows numeric, space, +, -, (, ) only. You can add multiple Fax numbers and Email IDs separated by comma or semicolon

Save Cancel

## 11.5 Re-activate Reference Key

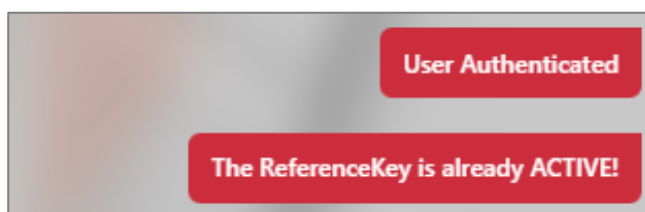
If you select **Re-activate Reference Key** from the available service options, follow these steps:

1. Enter corresponding name in the **Hospital or Pharmacy or Provider or Your Name** text box.
2. Enter the email id in the **Email ID** text box.
3. Enter or copy-paste the expired Reference Key in the **Reference Key** textbox.
4. Enter the captcha in the **Captcha** text box.
5. Click the **Submit** button. On successful validation, the entered reference key will be reactivated and will display the date till when the key will be active. A disclaimer with key information to alert the user will be displayed as shown in the following screenshot:



**Note:**

- If the key is already active and if you try to re-activate the key, the following message appears:



- An email confirmation that the reference key has been re-activated is sent to the provider. A copy can optionally be marked to required EXL mailroom group for EXL's reference.

## 11.6 MR Invoice Payment Status

If you select **MR Invoice Payment Status** from the available service options, follow these steps:

1. Enter corresponding name in the **Hospital or Pharmacy or Provider or Your Name** text box.
2. Enter the email id in the **Email ID** text box.
3. Enter or copy-paste the Reference Key in the **Reference Key** textbox.



SELECT A SERVICE FROM THE FOLLOWING OPTIONS:

Audit Status Portal Record Upload Status Ask a Question? Contact Change Request Re-activate Reference Key

MR Invoice Payment Status

MR Invoice Payment Status

test

Test@testemail.com

29 31

Submit

User Authenticated

Multiple MR Invoices are available for the entered reference key

A new service request has been created, Id 737880. Please allow up to 2 business days for a response.

4. Click **Submit**. On successful authentication, the MR Invoice payment status will be displayed, and an email notification will also be sent to the Provider with the payment status for reference. Based on the entered reference key, for various payment statuses, the relevant messages will be displayed. If the invoice is not found/multiple copies of the invoice exist, a service request will be logged, and the following message appears as shown in the following screenshot:

User Authenticated

Multiple MR Invoices are available for the entered reference key

A new service request has been created, Id 737833. Please allow up to 2 business days for a response.