INSURANCE ENROLLMENTS

TriZetto Enrollment Portal

Updated: March 2025

Introduction

This guide is designed to instruct customers how to enroll for electronic services using the electronic data interchange (EDI) enrollment portal powered by Madaket Health, a TriZetto partner.

The TriZetto Enrollment Portal provides customers direct access to Tebra's clearinghouse (TriZetto) to enroll for electronic services: Claims, Eligibility, and/or electronic remittance advice (ERA).

You will learn how to add insurance companies in Tebra. You will also learn how to navigate the TriZetto Enrollment portal, create users, and the complete workflow to manage enrollments for your practices and/or providers.

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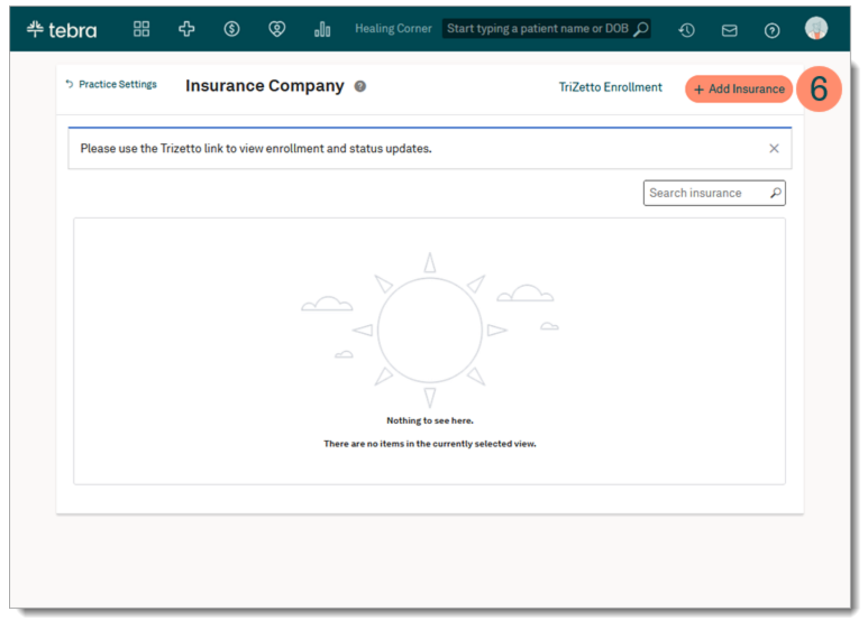
Add Insurance

We recommend creating insurance companies in Tebra before starting enrollments in the TriZetto Enrollment Portal. Insurance companies represent an insurance carrier or network (e.g., Blue Cross Blue Shield, Cigna, Medicare). Once an insurance company record is created, you can add insurance plans to associate to a patient's record. To configure the insurance company billing settings (e.g., electronic claims submission settings), review Admin Setup Guide Part 2.



1. Open an internet browser, such as Google Chrome and Firefox. Then, type app.kareo.com in the top address bar and press **Enter** on your keyboard. The *Tebra* login page opens.
   Tip: Bookmark the URL for easy access.
2. Enter the email address associated with your Tebra username and your password.
3. Click **Login to Tebra**. The *Dashboard* page opens.
4. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
5. Click **Insurance**. The *Insurance Company* dashboard opens.
6. Click **+Add Insurance**. The *Most Commonly Requested* tab of the *Add Insurance* pop-up window opens.

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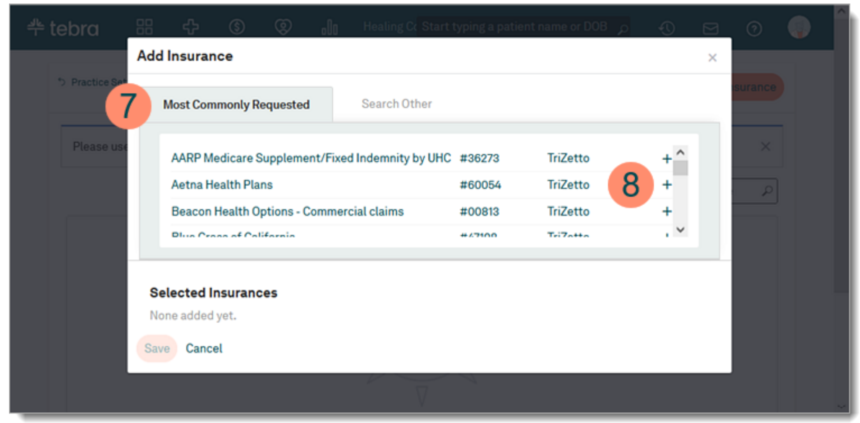
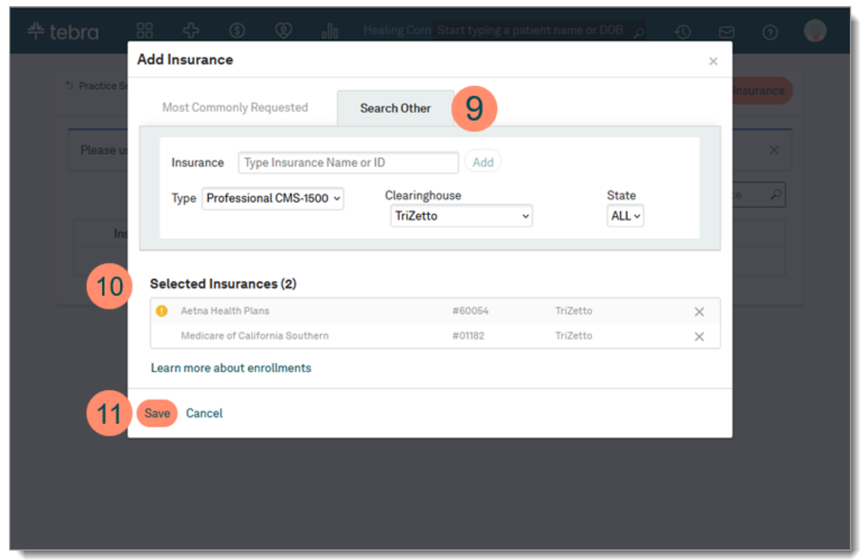
Add Insurance, cont.

7. **Most Commonly Requested:** List of common insurances in the state where the practice is located.

8. **Add Insurance:** Click **+** or anywhere on the line item to add the insurance company to the *Selected Insurances* list.



9. **Search Other:** Search for other insurance companies by entering the *Insurance Name* or *ID number* and select it from the auto-populated results list. Then, click **Add** to add the insurance company to the *Selected Insurances* list. If necessary, filter by *Type*, *Clearinghouse*, or *State*. Note: For worker's comp and auto accident, select *Jopari* as the clearinghouse to send claims at no additional cost.



10. **Selected Insurance:** List of selected insurance companies to add to your Tebra account. To remove an insurance company from the list, click **X**. An orange icon displays if the insurance company is a duplicate or already exists in the account.

11. Click **Save** when finished.

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TriZetto Enrollment Portal

As the enrollment contact for the practice, you will receive a welcome email from support@madakethealth.com with a link to set up your TriZetto Enrollment Portal user after the configuration call with the practice's Onboarding Manager.

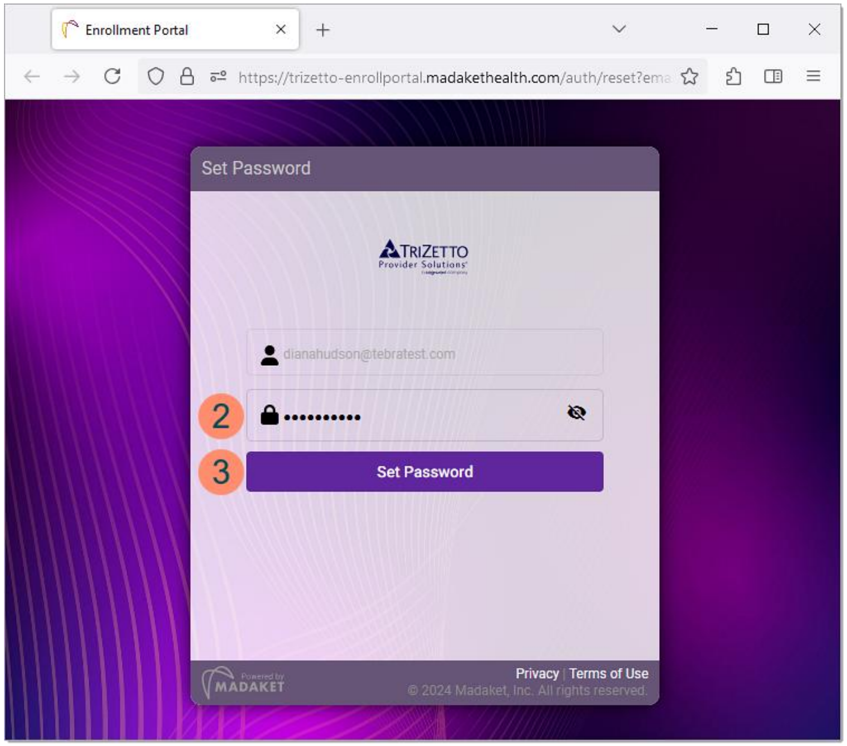
Note: Disregard the EDI Enrollment Portal (EEP) – Internal Training Guide in the welcome email. The content does not reflect the recommended workflow for Tebra customers. Additionally, for questions or assistance with access, contact Customer Care.

Set Password

1. Once the email is received, click the link to set your password. The *Enrollment Portal* page opens in a browser window.
   Tip: If you have not received the email within 3-5 business days of the configuration call, check your email's spam, junk, or trash folder.

2. Enter a *Password* that meets the following requirements:
   - Contains at least 10 characters
   - At least one lowercase character
   - At least one uppercase character
   - At least one number character
   - At least one special character

3. Click **Set Password** when finished. The enrollment portal *Dashboard* opens.
   Tip: Bookmark the TriZetto Enrollment Portal URL or access the TriZetto Enrollment Portal link from the Insurance page in Tebra.



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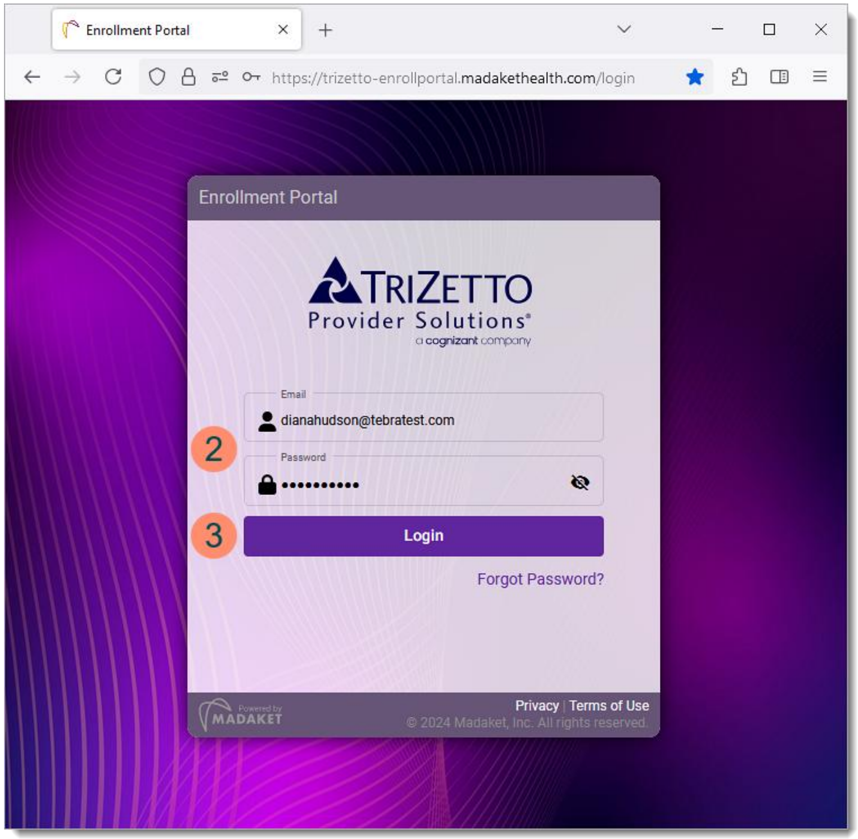
Access TriZetto Enrollment Portal

If you are not signed into the TriZetto Enrollment Portal, log in to access your Dashboard.

1. Access the TriZetto Enrollment Portal. The *Enrollment Portal* login page opens.
   Tip: Bookmark the URL or access the TriZetto Enrollment Portal link from the Insurance page in Tebra.

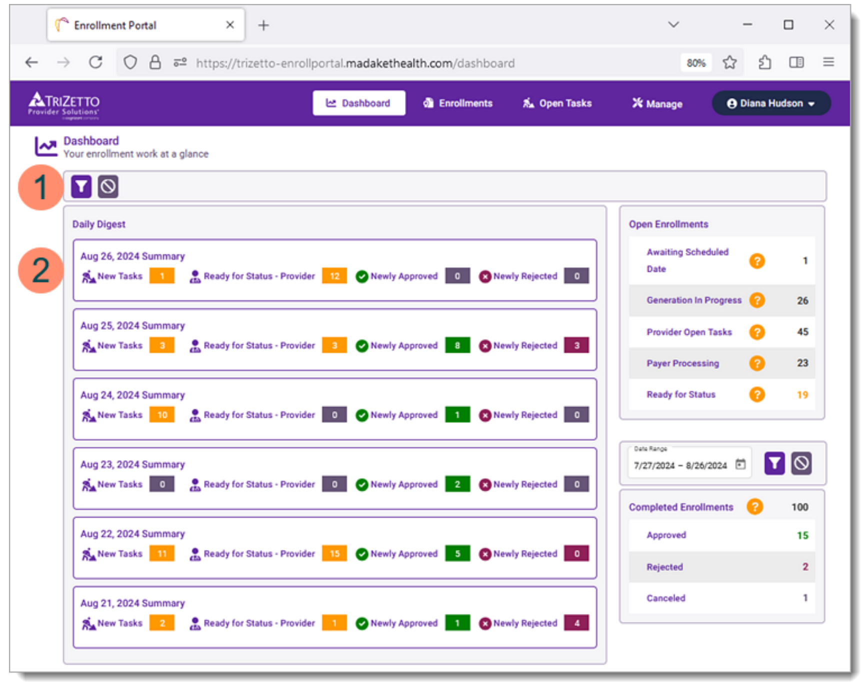
2. Enter your *Email* address associated with your TriZetto Enrollment Portal and *Password*.

3. Click **Login**. The *Dashboard* page opens.



Navigate Dashboard

The *Dashboard* displays the *Daily Digest*, *Open Enrollments*, and *Completed Enrollments* for all your practices and providers.



1. **Filters:** If applicable, update the *Dashboard* to only display activities for a specific account name (Site ID), National Provider Identifier (NPI), or Taxpayer Identification Number (TIN). Click the **filter** icon and enter up to five *Site ID*, *NPI*, or *TIN*. Then, click **Search** when finished.
   - To remove the filter(s), click the **stop** icon.

2. **Daily Digest:** Displays a daily summary of enrollments for the practices and/or providers. Click **New Task**, **Ready for Status – Provider**, **Newly Approved**, or **Newly Rejected** to review additional information.
   - *New Tasks:* Displays the number of new tasks added to the work queue for the specific date. Review the Navigate Open Tasks section to learn more.
   - *Ready for Status – Provider:* Displays the number of new enrollments that have passed the estimated processing time with the payer and are ready for payer follow up to obtain status. The count for each day only includes enrollments added to this list on that date.
   - *Newly Approved:* Displays the number of approved enrollments for the specific date.
   - *Newly Rejected:* Displays the number of rejected enrollments for the specific date.

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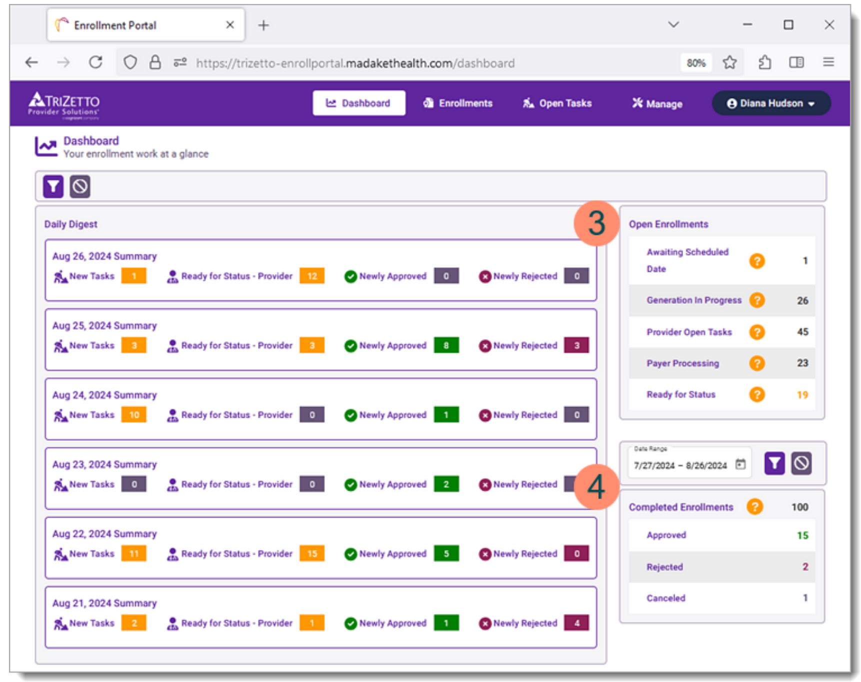
Navigate Dashboard, cont.

3. **Open Enrollments:** Displays the number of open enrollments for each status. Review the Navigate Enrollment Tabs section to learn more.
    - *Awaiting Scheduled Date:* Enrollments awaiting processing to align with the NPI's go-live date.
    - *Generation In Progress:* Enrollments are under review or being prepared for payer submission.
      Note: If you have a future go-live date, the enrollment submission will be delayed to align with that date.
    - *Provider Open Tasks:* Enrollments need provider action prior to payer submission.
    - *Payer Processing:* Enrollments are submitted to the payer and awaiting processing time for the payer to review the submission.
    - *Ready for Status:* Enrollments have passed the estimated processing time with the payer and are ready to follow up with the payer for status.



4. **Completed Enrollments:** By default, displays the number of enrollments marked as completed with a status (e.g., approved or rejected) from the payer or were canceled by the user for the last 30 days.
    - To filter completed enrollments by a different date rate, click the **calendar** icon and select a new date range. Then, click the **filter** icon to display the completed enrollments for the date range.

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Navigate Manage Sites

Manage Sites allow you to manage your practices, providers, users, and preferred plans.

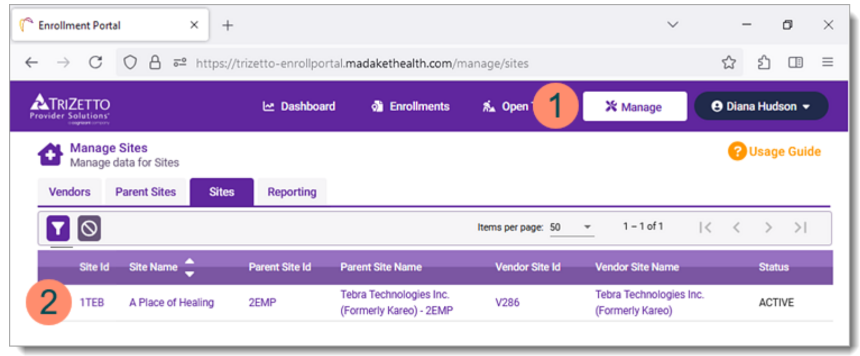
1. Click **Manage**. The *Manage Sites* page opens.

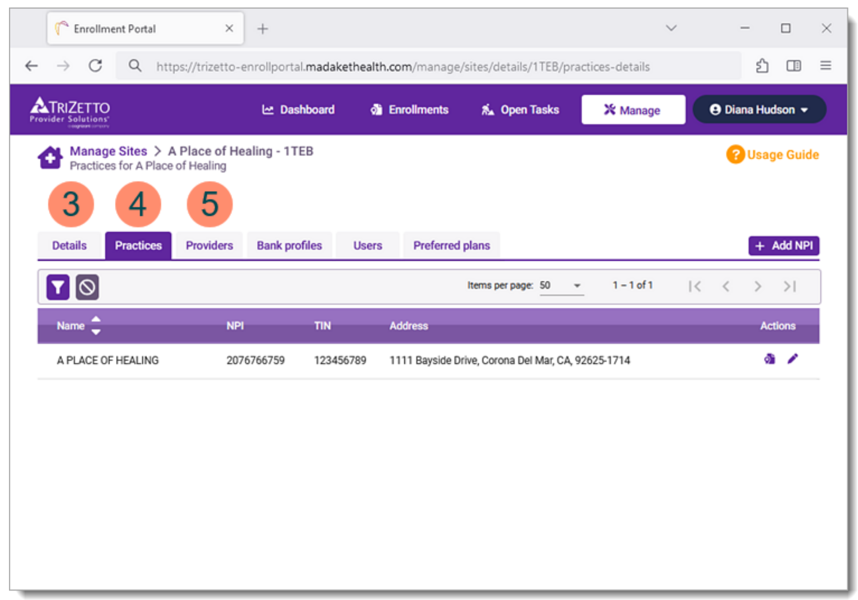
2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.
   Note: A Site ID is assigned to each Tebra account created in the portal and may be referenced for support purposes. If you have multiple Tebra accounts set up for enrollments, a list of sites will display.

3. **Details:** Displays information about the account. You can edit the account and default enrollment contact populated on the enrollment forms.

4. **Practices:** Displays all practices that require group enrollments. You can add additional practices, start a new enrollment, and update the practice's information. Review the Verify Practice Information section for instructions.

5. **Providers:** If applicable. displays providers that require individual enrollments. You can add additional providers, start a new enrollment, and update the provider's information. Review the Verify Provider Information section for instructions.





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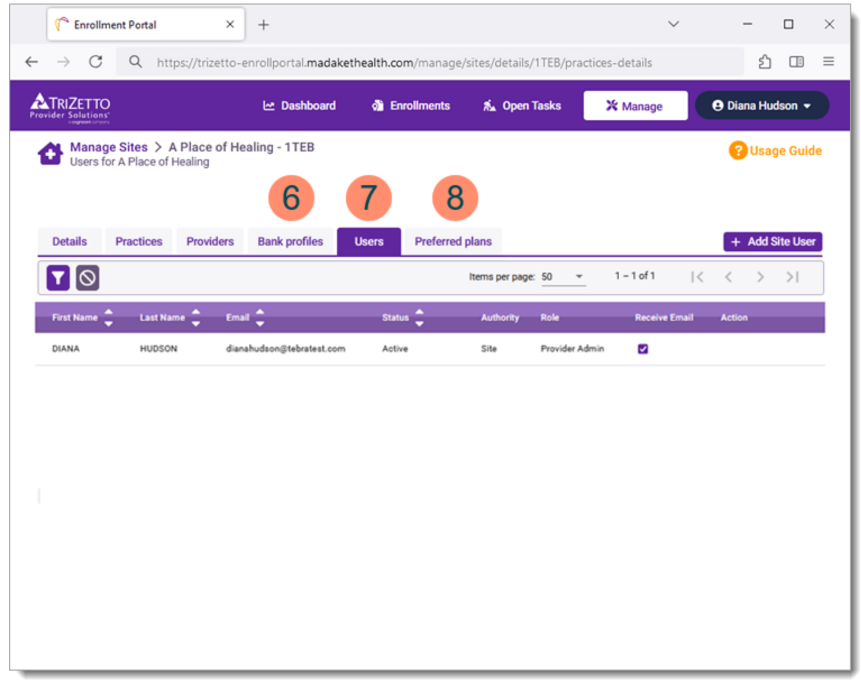
Navigate Manage Sites, cont.

6. **Bank Profiles:** Optionally, the practice or provider can add their bank information. However, it is not required to complete enrollments. Bank information should be provided to the payer directly when applicable.

7. **Users:** Displays a list of users who have access to the account's TriZetto Enrollment Portal. If applicable, you can add new users to access the TriZetto Enrollment Portal. Review the Create Users section for instructions.

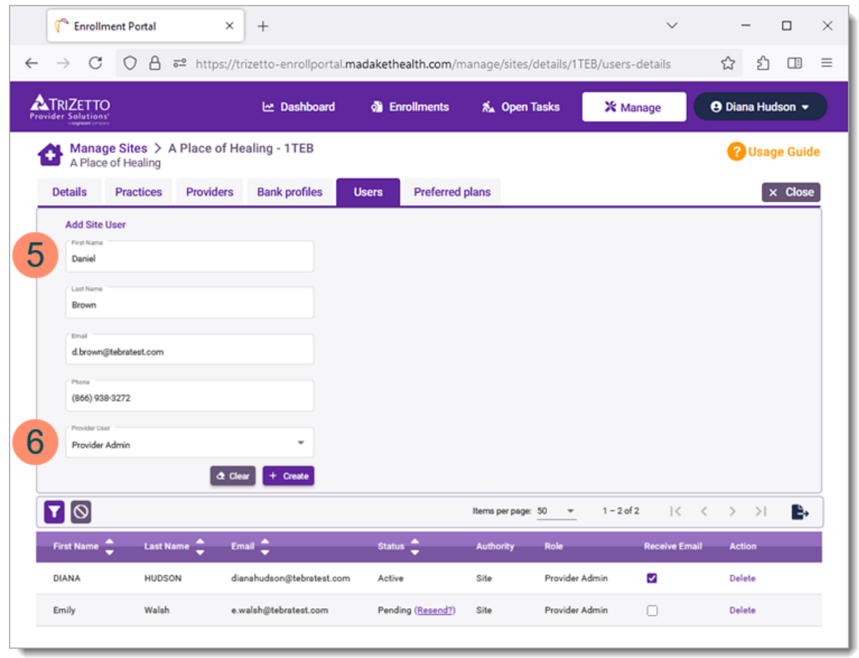
8. **Preferred Plans:** Displays a custom list of preferred plans that will be added when starting a new enrollment. You can add or remove plans to customize the list for your practice or providers. Review the Manage Preferred Plans section for instructions.



Create Users

Each staff member who needs access to the TriZetto Enrollment Portal must have their own user account with a valid login email and password. Be sure to have the person's full name and email address on hand before proceeding. User accounts cannot be edited after they are created.

Note: If a user should no longer access the practice's TriZetto Enrollment Portal, contact Customer Care to remove the user.



1. Click **Manage**. The *Manage Sites* page opens.
2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.
3. Click the *Users* tab. The *Users* page opens.
4. Click **+Add Site User**. The *Add Site User* section displays.
5. Enter the user's *First Name, Last Name, Email,* and *Phone*.
6. Click the *Provider User* drop-down to select a role to assign the user. Available options:
   - *Provider Admin:* Assign the user all default privileges
   - *Provider User:* Assign the user all default functionality except the ability to add/delete other provider users
   - *Restricted Plans Provider User:* Assign the user all default privileges except the ability to enroll in additional plans other than preassigned
   - *Provider Task User:* Assign the user only the ability to access tasks

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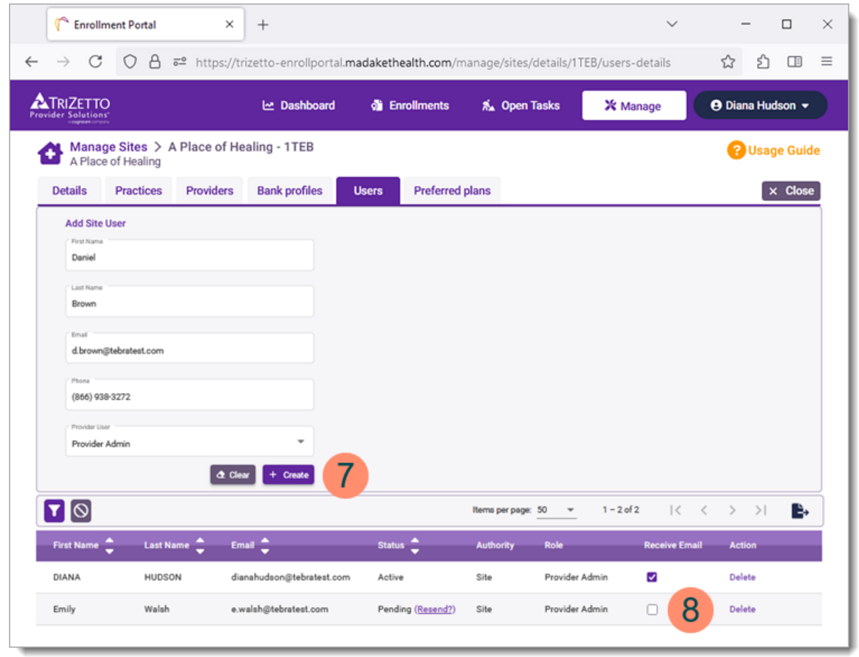
Create Users, cont.

7. Click **+ Create** when finished. The user receives a welcome email from support@madakethealth.com with a link to set up their TriZetto Enrollment Portal user and password. The link will expire in 24 hours.
   Tip: If the user does not see the email, ask them to check their Junk, Spam, and Trash folder.
   - To send the welcome email again, click **Resend**.

8. After the user successfully logs into the TriZetto Enrollment Portal, click to select the “Receive Email” checkbox to send email correspondence and enrollment paperwork notifications from Madaket Health to the user.



Verify Practice Information

Verify the practice details are correct and select a corresponding and enrollment contact for the practice.

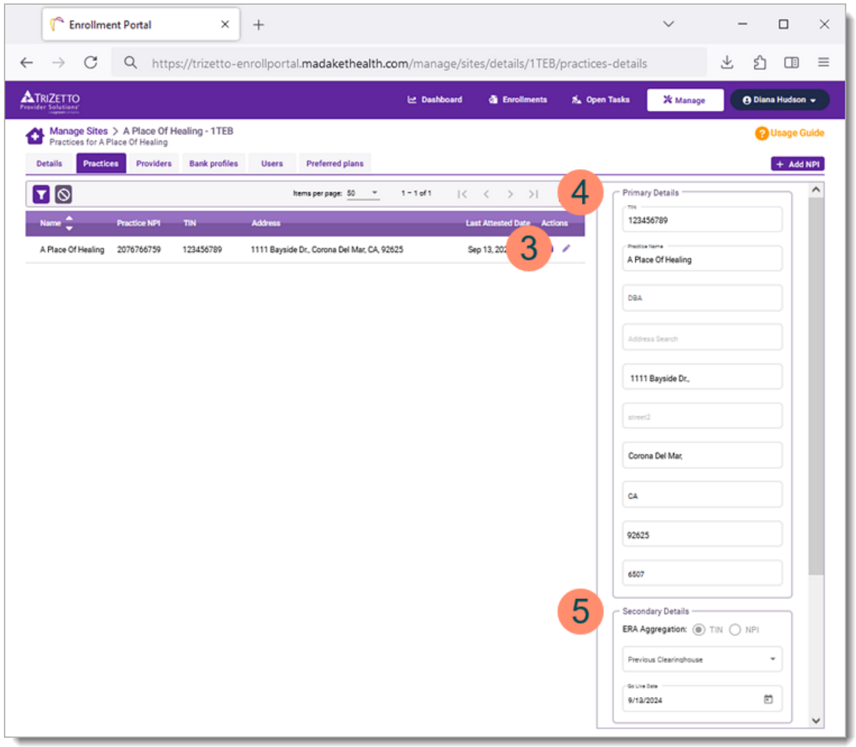
1. Click **Manage**. The *Manage Sites* page opens.

2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.

3. Click the **pencil** icon. The practice details panel opens.

4. **Primary Details:** Verify the *TIN*, *Practice Name*, *Doing Business As (DBA),* and Address is valid.
   - If the information is incorrect, a new practice profile must be created. Review the Add New Practice section for instructions.

5. **Secondary Details:** Select the applicable information.
   - *Previous Clearinghouse:* If applicable, select if a previous clearinghouse was used before switching to TriZetto.
   - *Go-Live Date:* Enter the date you would like to begin submitting claims through TriZetto for the NPI.



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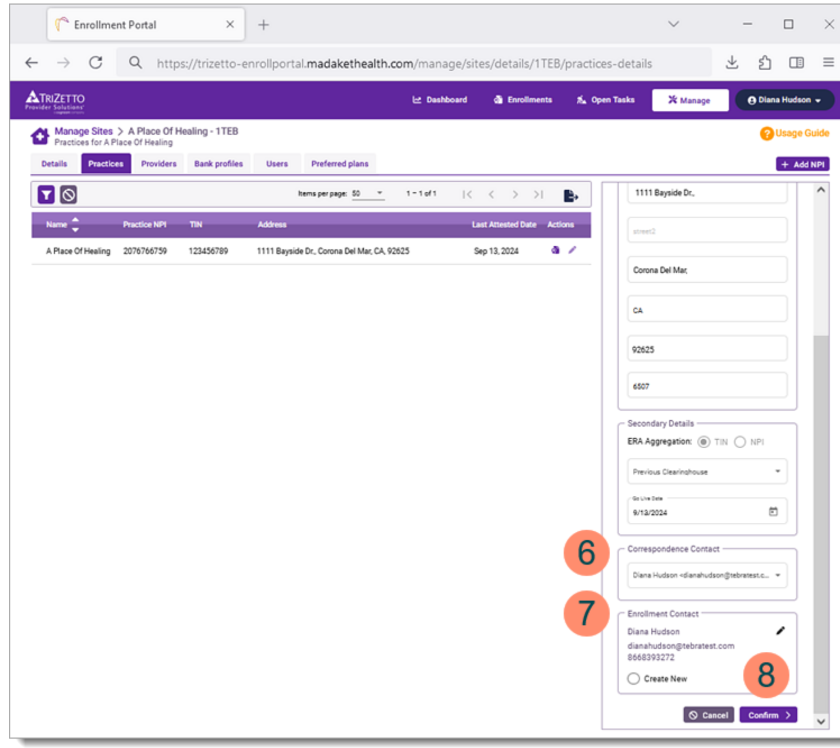
Verify Practice Information, cont.

6. **Correspondence Contact:** Select the user who should receive email correspondence and enrollment paperwork notifications from Madaket Health.
    - The contact list is populated with active user accounts in the TriZetto Enrollment Portal.

7. **Enrollment Contact:** Display the enrollment contact information that will be entered on every enrollment document for the practice.
    - To change the enrollment contact, click to select “Create New”. Then, enter the contact’s name, email address, and phone number.

8. Click **Confirm** when finished.

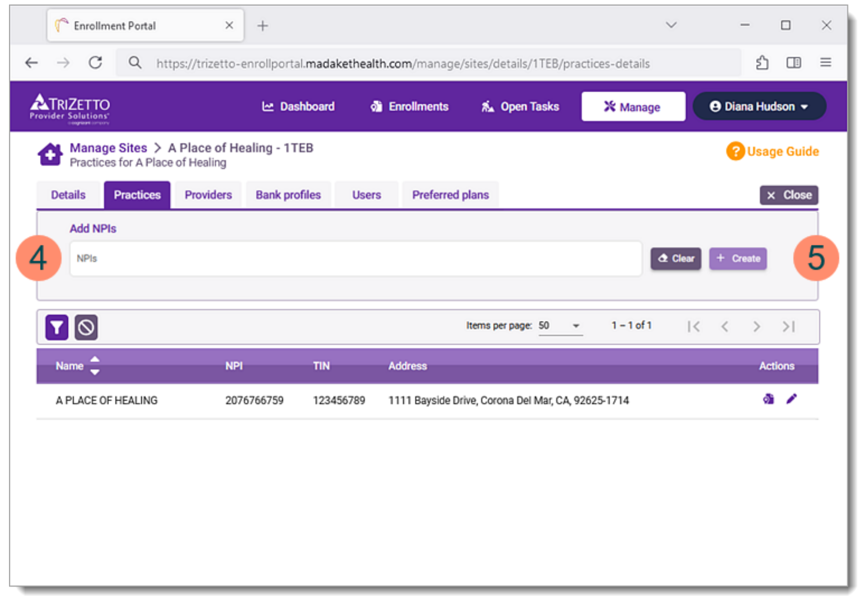


Add New Practice

Add a new practice to start enrollments for a new group NPI or create a new practice profile when an existing practice has incorrect information.

Note: Practices added to the TriZetto Enrollment Portal will not create a new practice in Tebra.

1. Click **Manage**. The *Manage Sites* page opens.
2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.
3. Click **+ Add NPI**. The *Add NPIs* section displays.
4. Enter the *NPI* for the new practice.
   - To create multiple practices, enter multiple NPIs separated by a comma.
5. Click **Create** when finished. The new practice details panel opens.
   Note: The *Practice Name* and *DBA* is pulled from the NPPES NPI Registry and cannot be edited.



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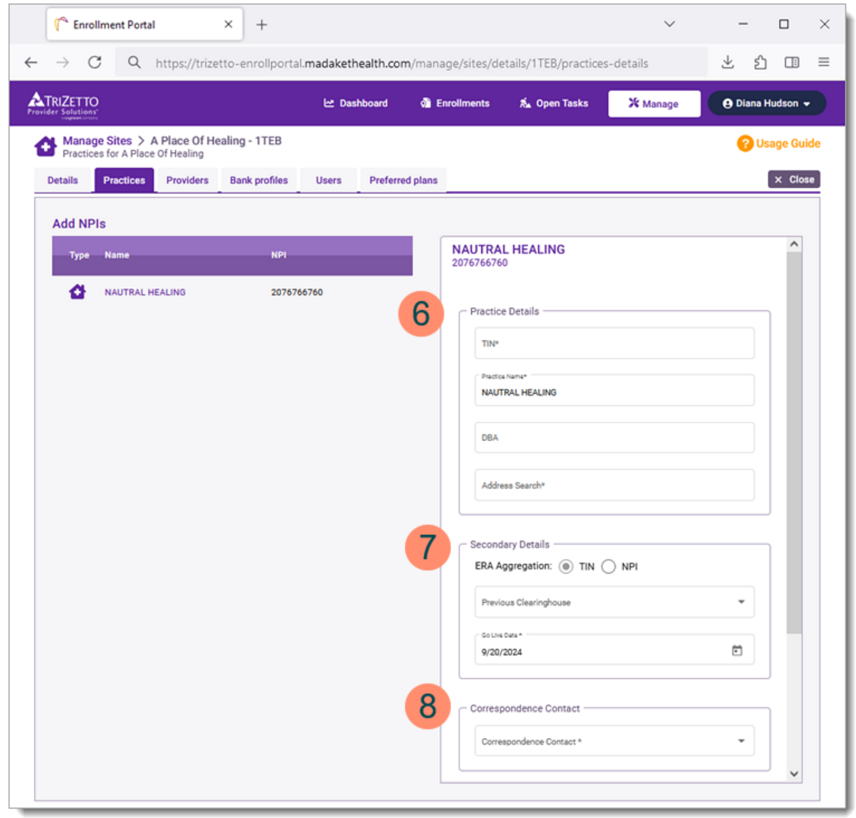
Add New Practice, cont.

6. Enter *Practice Details*:
   - *TIN:* Enter the practice's taxpayer identifier number.
   - *Address:* Enter the practice address and select the address from the search results.

7. Select *Secondary Details:*
   - *ERA Aggregation:* Click to select "TIN" or "NPI".
   - *Previous Clearinghouse:* If applicable, select if a previous clearinghouse was used before switching to TriZetto.
   - *Go-Live Date:* By default, the current date is populated. If applicable, enter a new date you would like to begin submitting claims through TriZetto for the NPI.

8. **Correspondence Contact:** Select the user who should receive email correspondence and enrollment paperwork notifications from Madaket Health.



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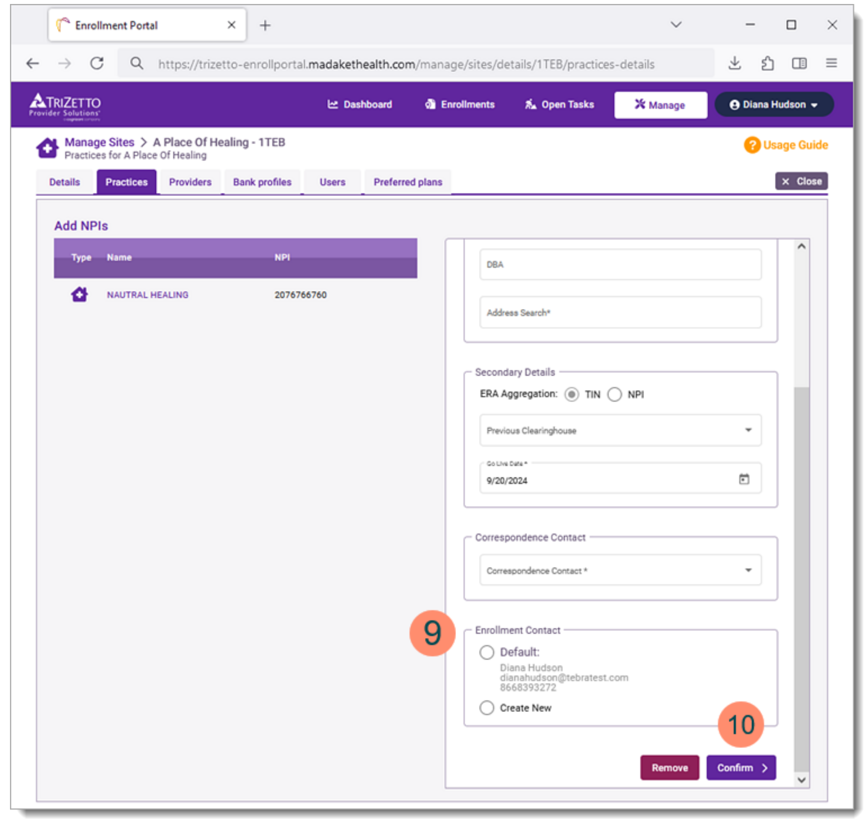
Add New Practice, cont.

9. **Enrollment Contact:** Display the enrollment contact information that will be entered on every enrollment document for the practice.
    - To change the enrollment contact, click to select “Create New”. Then, enter the contact’s name, email address, and phone number.

10. Click **Confirm** when finished. The practice now displays.
    Note: The *TIN*, *Address*, and *ERA Aggregation* cannot be changed after the practice is saved. Verify all information is correct before clicking confirm.



Verify Provider Information

If the practice bills with individual NPI, verify the provider's details are correct and select a corresponding and enrollment contact for the provider.

1. Click **Manage**. The *Manage Sites* page opens.

2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.

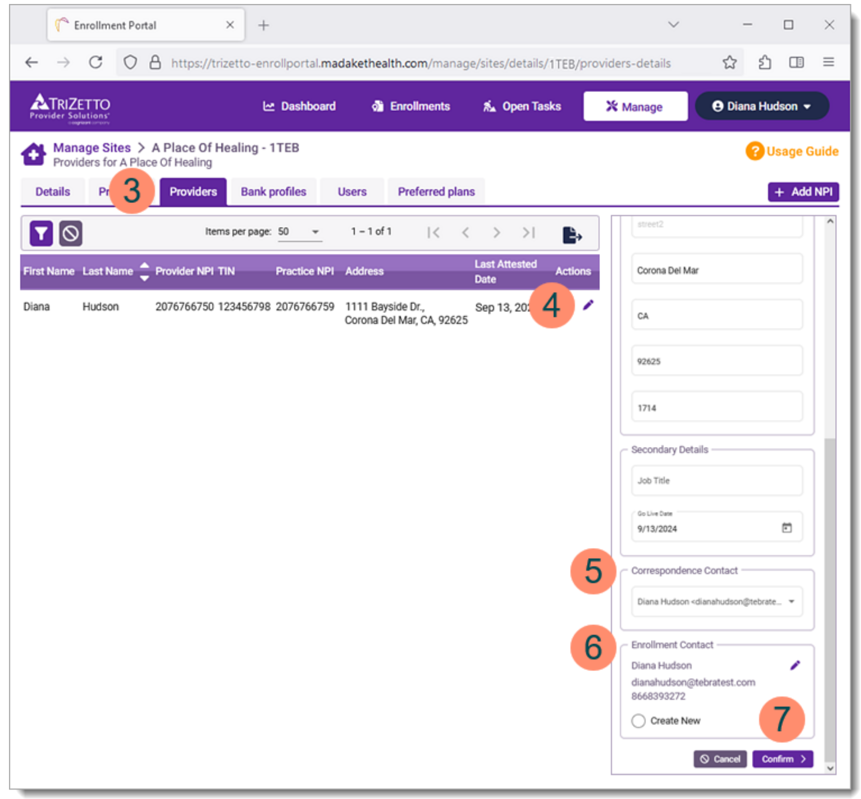
3. Click the *Providers* tab. The *Providers* page opens.

4. Click the **pencil** icon. The provider details panel opens.

5. **Correspondence Contact:** Select the user who should receive email correspondence and enrollment paperwork notifications from Madaket Health.
   - The contact list is populated with active user accounts in the TriZetto Enrollment Portal.

6. **Enrollment Contact:** Display the enrollment contact information that will be entered on every enrollment document for the practice.
   - To change the enrollment contact, click to select "Create New". Then, enter the contact's name, email address, and phone number.

7. Click **Confirm** when finished.



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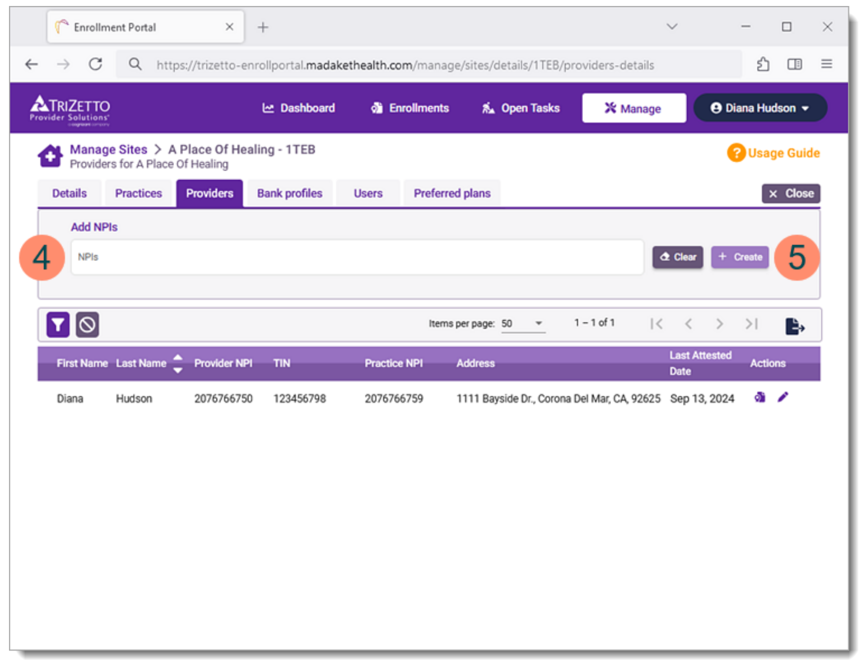
Add New Provider

Add a new provider to start enrollments for a new individual NPI or create a new provider when an existing provider has incorrect information.

Note: Providers added to the TriZetto Enrollment Portal will not create a new provider record in Tebra. To add a new provider in Tebra, review the Add New User or Provider Account help article.

1. Click **Manage**. The *Manage Sites* page opens.
2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.
3. Click the *Providers* tab. The *Providers* page opens.
4. Click **+ Add NPI**. The *Add NPIs* section displays.
5. Click **Create** when finished. The new provider details panel opens.



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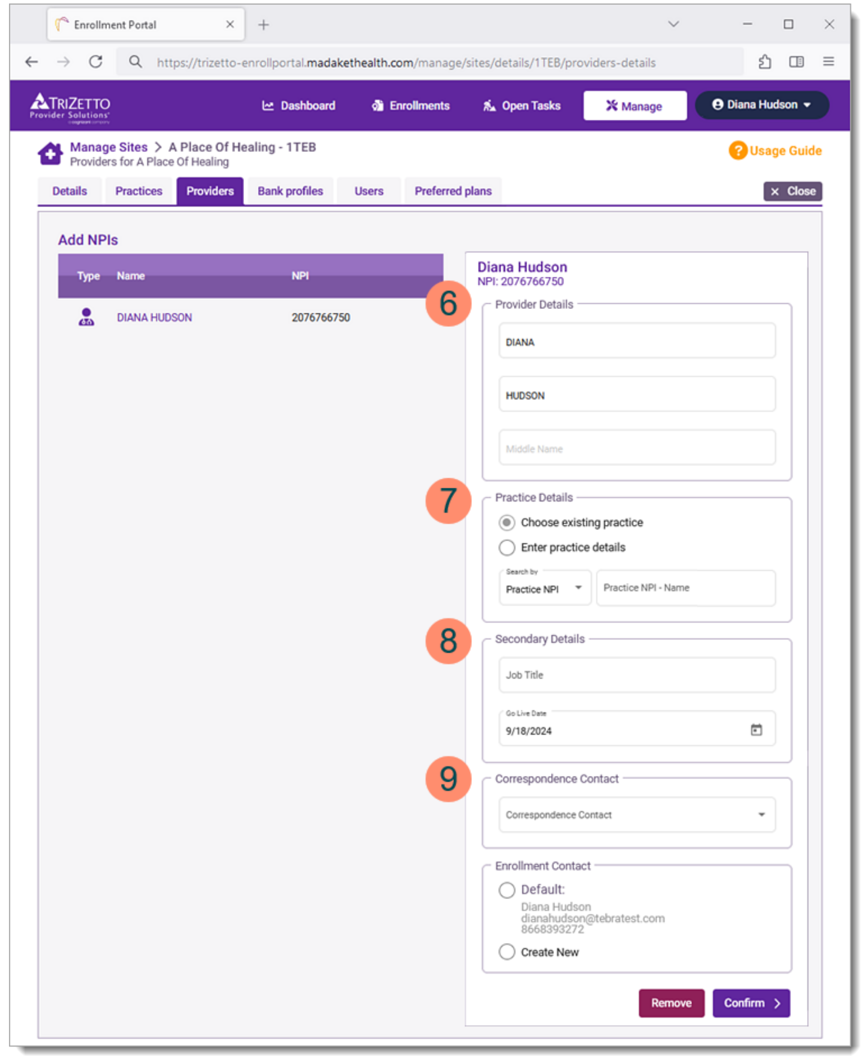
Add New Provider, cont.

6. Verify *Provider Details*:
    - *Provider Name*: The provider's name is pulled from the [NPPES NPI Registry](#).

7. Select *Practice Details*:
    - *Choose existing practice:* By default, this option is selected. Search by the *Practice NPI*, *TIN*, *Address* or *Practice Name* and select from the results.
    - *Enter practice details:* Click to select this option to enter a different practice. Enter the *TIN* and select *Practice NPI* or *Address Only.* Then, enter the applicable details.

8. Select *Secondary Details:*
    - *Job Title:* If applicable, enter the provider's job title.
    - *Go-Live Date:* By default, the current date is populated. If applicable, enter a new date you would like to begin submitting claims though.

9. **Correspondence Contact:** Select the user who should receive email correspondence and enrollment paperwork notifications from Madaket Health.



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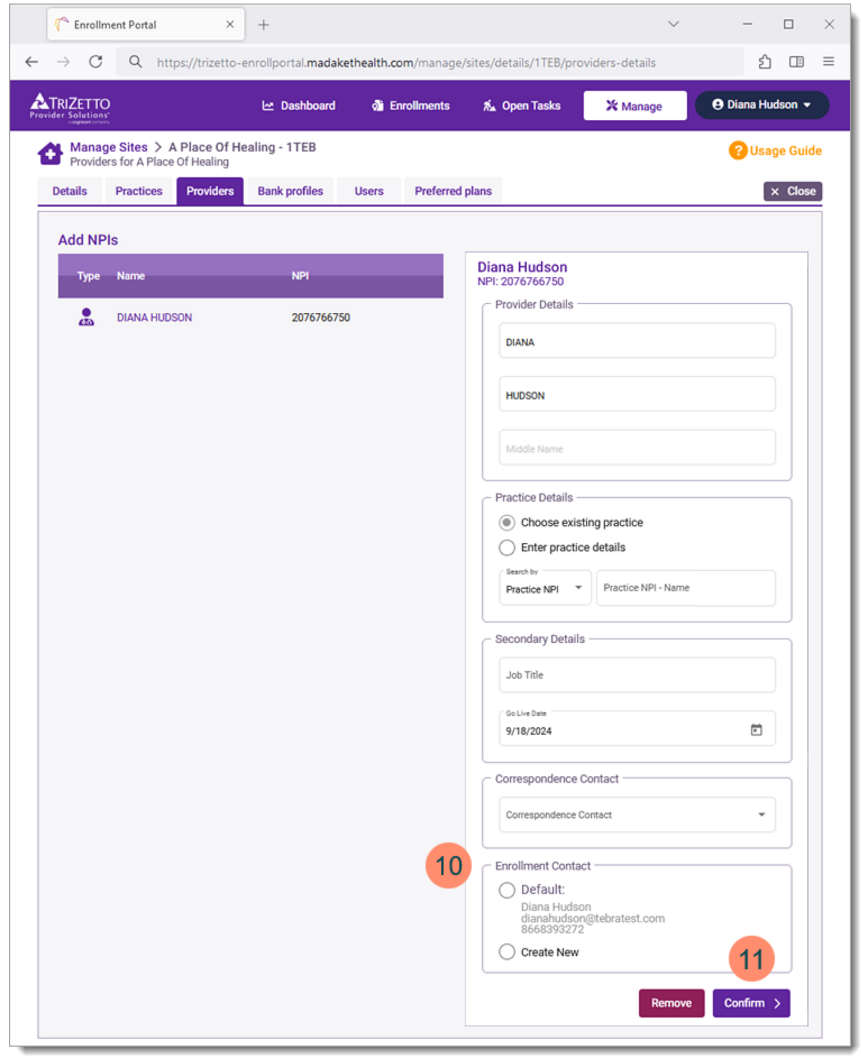
Add New Provider, cont.

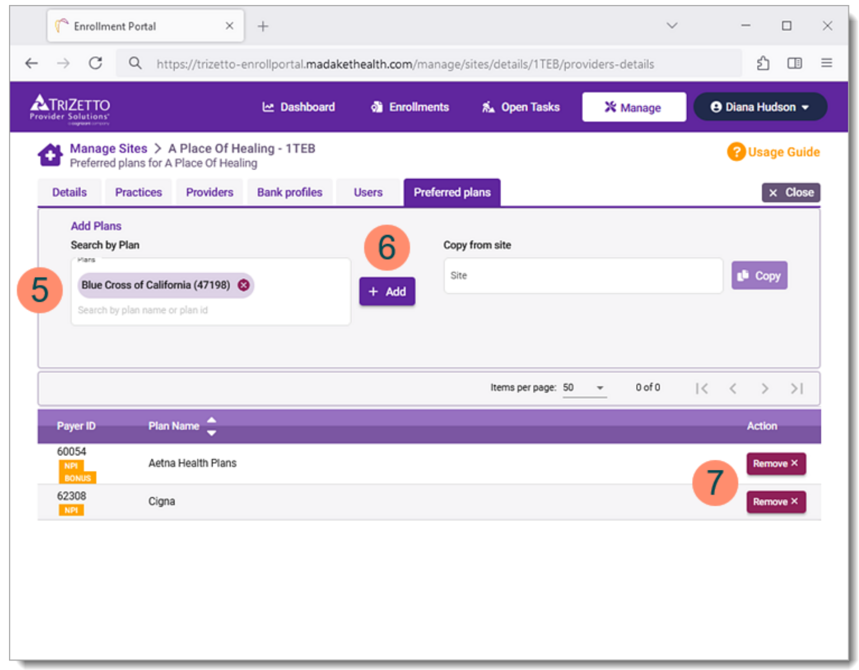
10. **Enrollment Contact:** Displays the enrollment contact information that will be entered on every enrollment document for the practice.
    - To change the enrollment contact, click to select “Create New”. Then, enter the contact’s name, email address, and phone number.

11. Click **Confirm** when finished. The provider now displays.



Manage Preferred Plans

Optionally, create a list of insurance plans to quickly enroll multiple plans in the Enroll Wizard for practices or providers. If necessary, remove the plan when they are no longer applicable.



1. Click **Manage**. The *Manage Sites* page opens.

2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.

3. Click the *Preferred Plans* tab. The *Preferred Plans* page opens.

4. Click **+ Add Plan**. The *Add Plans* section displays.

5. Enter the plan name or plan ID and select from the results. If applicable, enter additional plans.
   Note: The TriZetto Enrollment Portal does not support worker's comp and auto accident payers. Review the Electronic Workers' Compensation and Auto Insurance Companies help article to learn how to add worker's comp and auto payers in Tebra's Desktop Application (PM).

6. Click **+ Add** when finished. A confirmation message displays.

7. To remove a plan from the preferred list, click **Remove**.

Enroll Insurance Plans

Submit EDI enrollment requests for electronic service connections through the new enrollment Enroll Wizard. Enrollments are completed with the billing TIN and NPI used for submitting claims per the practice's or provider's agreement with the insurance companies.

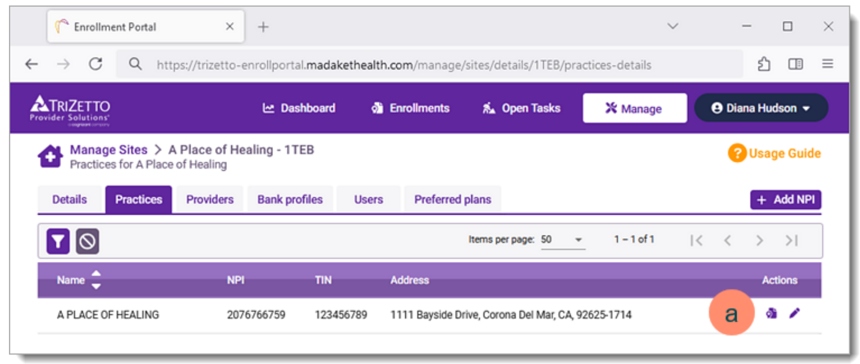
Access New Enrollments

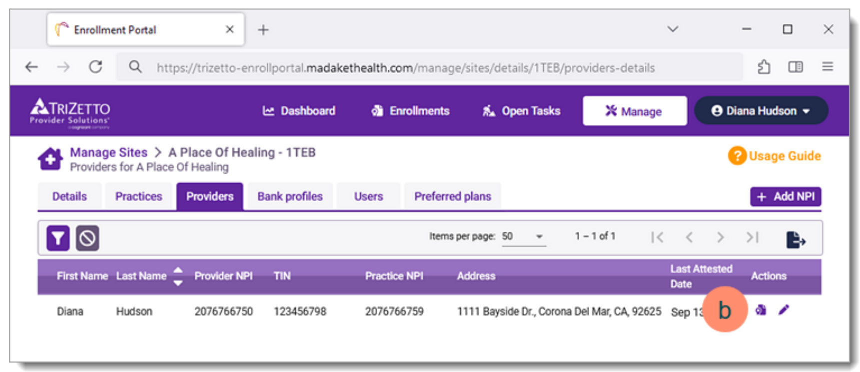
1. Click **Manage**. The *Manage Sites* page opens.

2. Click the **Site ID**. The *Manage Sites* page opens to the *Practices* tab.

3. Enrollments can be submitted as a practice or an individual provider:
   a. To enroll as a group, click the **file** icon. The *New Enrollments* page opens.

   b. To enroll as an individual provider, click the *Providers* tab. Then, click the **file** icon. The *New Enrollments* page opens.





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New Enrollments

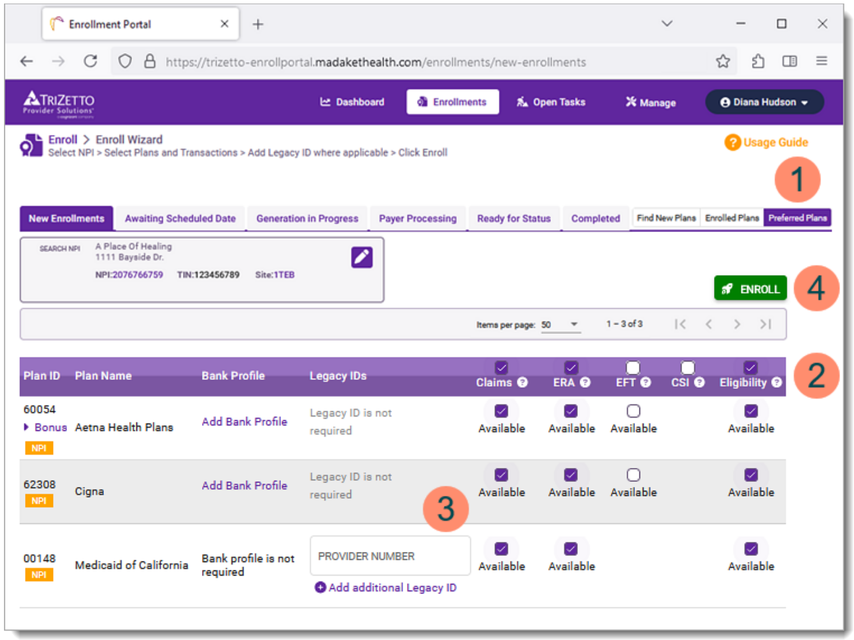
Enrollments can be submitted for claims, ERA, and/or Eligibility with the configured preferred plans or by searching for new plans.

Notes:

- The Claim Status Inquiry (CSI) service is not supported and should not be selected for enrollment.
- The Electronic Funds Transfer (EFT) service cannot be processed as a stand-alone service in the TriZetto Enrollment Portal and should not be selected for enrollment. EFT will only be processed when the service is required to complete ERA enrollment. Otherwise, the practice or provider will need to set up EFT with the payer directly.

New Enrollments – Preferred Plans

Submit enrollments for Preferred Plans. Review the Preferred Plan section for instructions on how to add preferred plans.



1. Click the *Preferred Plans* tab. The preferred plans display.

2. Click to select the available electronic service(s): "Claims", " ERA", and/or "Eligibility" to enroll in for each plan.
   Tip: To enroll in a service for all available plans listed, click to select the option in the header.

3. If required for enrollment, enter additional information (e.g., Provider Number, PTAN).

4. Click **Enroll** when finished. A confirmation message displays. The enrolled plans now display in the *Enrolled Plans* tab.
   - If a plan does not have any electronic services selected, the plan will not be included in the enrollment.

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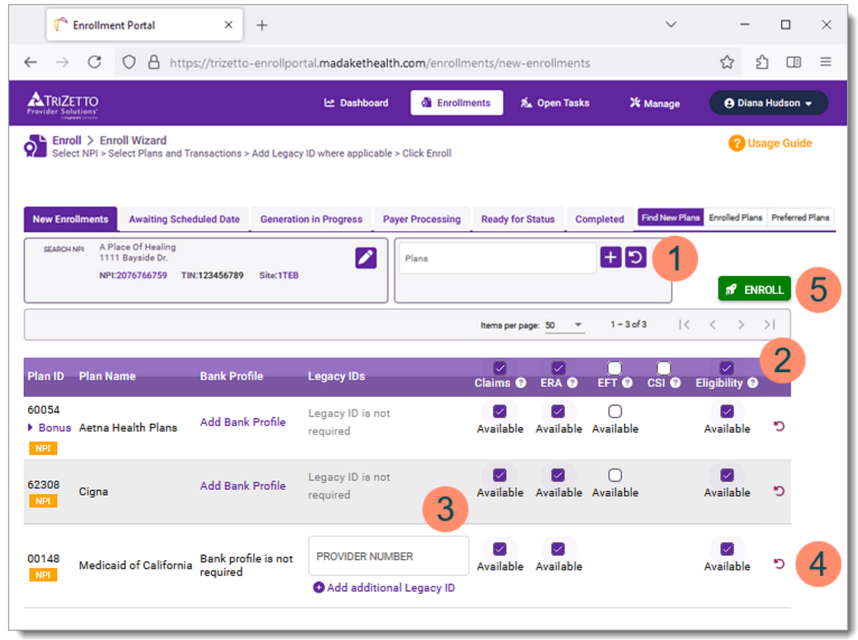
New Enrollment – Find Payer

Submit enrollments for plan by searching for the plan name or plan ID. Up to 25 plans can be submitted for enrollments at a time.

1. Enter the plan name or plan ID to find a plan. Then, click on a result to add the plan to the list.
   Note: The TriZetto Enrollment Portal does not support worker's comp and auto accident payers. Review the Electronic Workers' Compensation and Auto Insurance Companies help article to learn how to add worker's comp and auto payers in Tebra's Desktop Application (PM).
   - To filter plan results, click the **plus** icon and select applicable filters. Available filters: *Plan Coverage* (e.g., medical, vision), *State*, *Plan Affiliations* (e.g., Commercial), and *Plan Type* (e.g., Institutional).



2. Click to select the available electronic service(s): "Claims", " ERA", and/or "Eligibility" to enroll in for each plan.
   Tip: To enroll in a service for all available plans listed, click to select the option in the header.

3. If required for enrollment, enter additional information (e.g., Provider Number) to prevent enrollment rejection.

4. To remove a plan, click the **refresh** icon.

5. Click **Enroll** when finished. A confirmation message displays. The enrolled plans now display in the *Enrolled Plans* tab.

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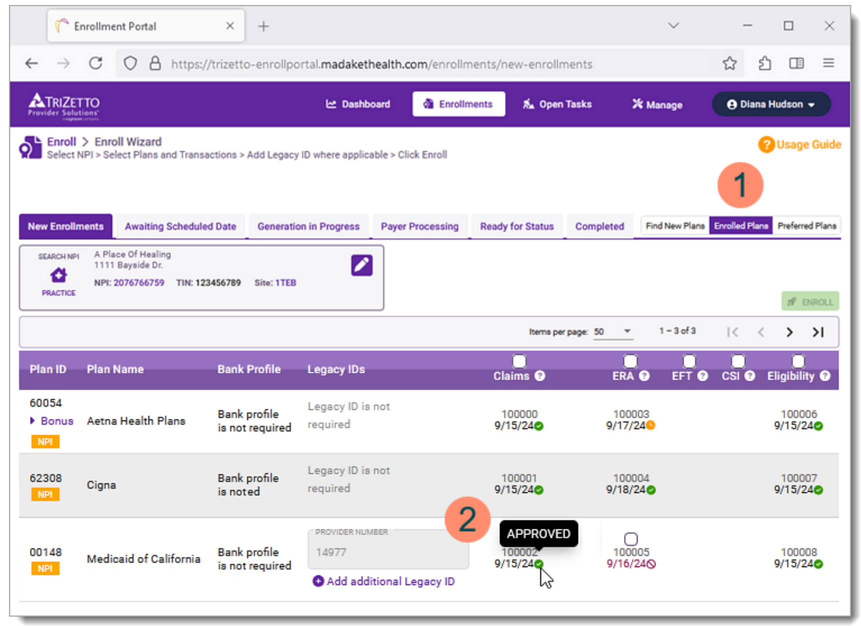
Review Enrolled Plans

The Enrolled Plans tab contains a list of all enrolled plans and services for a specific practice or provider. You can review the status (e.g., progress, approved, rejected, canceled) of the enrollment is in progress.

1. Click the *Enrolled Plans* tab. The enrolled plans display.

2. Review the enrollment:
   - *Enrollment ID:* A unique identification number generated for each service enrollment for tracking purposes.
   - *Date:* The date the enrollment status was updated
   - *Status:* Hover over the icon to display the status of the enrollment. Review the Enrollment Status section to learn more.



Enrollment Status

STATUS	DESCRIPTION
Approved	The payer has either approved the enrollment request or enrollment is not required.
Scheduled	The enrollment has been submitted but the task has not been generated by Madaket.
Pending	The enrollment is pending the payer's approval or there is an open task waiting to be completed.
On Hold	The enrollment is on hold due to a change or issue with the enrollment process.
Rejected	The payer has rejected the enrollment request.
Canceled	The enrollment request has been canceled by the practice, canceled by TriZetto, or the enrollment request has expired because action items have not been completed within the allotted time frame.
Restarted	The enrollment request was regenerated by Madaket.
Provider No Response	The provider has not completed their task for an enrollment within 45 business days.

Navigate Enrollment Tabs

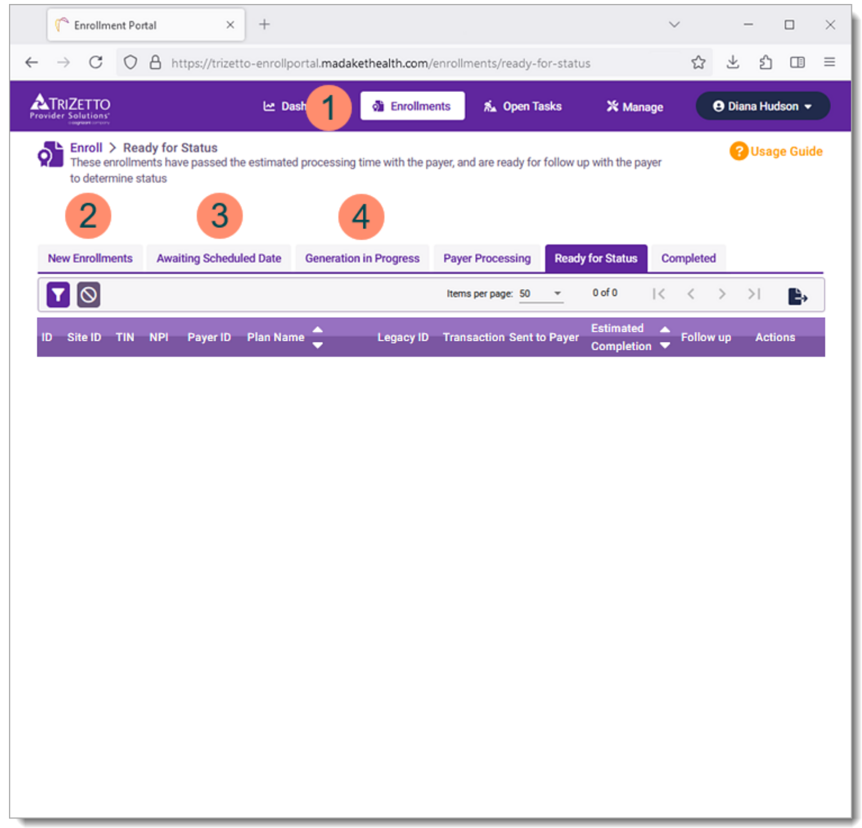
The Enrollment tabs display the practice and provider enrollments. You can filter the enrollments to review enrollments currently in progress with Madaket, sent to the payer, passed due, and completed.

1. Click **Enrollments**. The *Enroll* page opens to the *Ready for Status* tab.

2. **New Enrollments:** An enrollment request can be generated from this tab. Tebra recommends following the [Enroll Insurance Plan]() workflow to verify the enrollment is being processed for the correct practice or provider.

3. **Awaiting Scheduled Date:** Displays enrollment that has a future Go Live Date. These enrollments do not require action from the practice or provider. The enrollment will move to the *Generation in Progress* tab on the Go Live Date.

4. **Generation in Progress:** Displays enrollments that are under review or being prepared for payer submission. These enrollments do not require action from the practice or provider. The enrollment will move to the *Payer Processing* tab once the enrollment is submitted.



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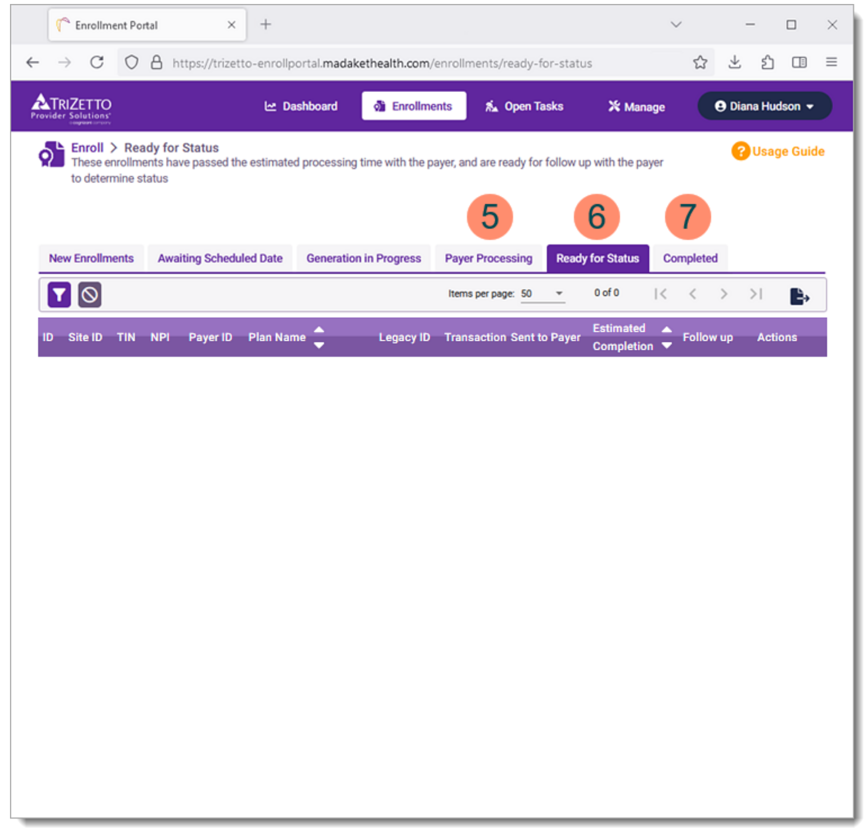
Navigate Enrollment Tabs, cont.

5. **Payer Processing:** Displays enrollments that are submitted to the payer for processing. Review the Payer Processing Tab section to learn how to manage these enrollments.

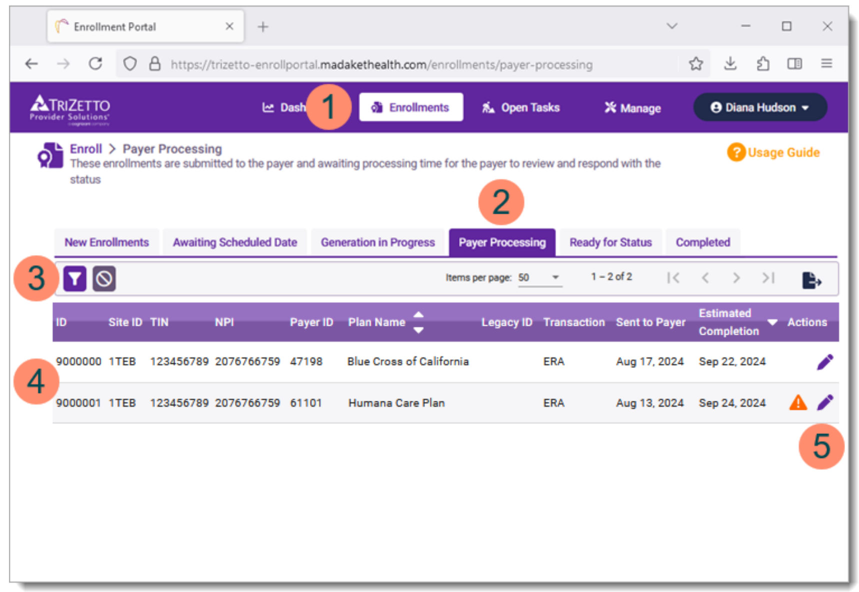
6. **Ready for Status:** Displays enrollments that have passed the estimated processing time with the payer and follow up with the payer is required to determine status. Review the Ready for Status Tab section to learn how to manage these enrollments.

7. **Completed:** Displays enrollments that have been marked completed with a status from the payer or because they were canceled or rejected by a user. Review the Completed Tab section to learn how to review these enrollments.



Payer Processing Tab

The Payer Processing tab displays enrollments that have been sent to the payer for processing. The enrollment displays an estimated completion date to indicate when the enrollment should be processed by the payer. It is recommended that you wait until this date to obtain a status update. If the status of the enrollment has not been updated by the estimated completion date, the enrollment will move to the Ready for Status tab for review. You also have the option to manually update the enrollment status and review the enrollment document that was submitted to the payer.



1. Click **Enrollments**. The *Enroll* page opens to the *Ready for Status* tab.
2. Click the *Payer Processing* tab. The *Payer Processing* page opens.
3. Click the **filter** icon to select available filters (e.g., Payer ID/Plan Name, NPI, TIN) to view specific enrollments. Then, click **Search**.
   - To remove the filter(s), click the **stop** icon.
4. Each enrollment has a unique ID associated with the enrolled plan and an *Estimated Completion* date the practice should expect a response from the payer.
   Note: If the enrollment has a warning icon, these payers will only provide a status to providers or the practice's authorized enrollment contact.
5. Click the **pencil** icon to update the enrollment status, review files, or review the enrollment history. The enrollment panel displays.

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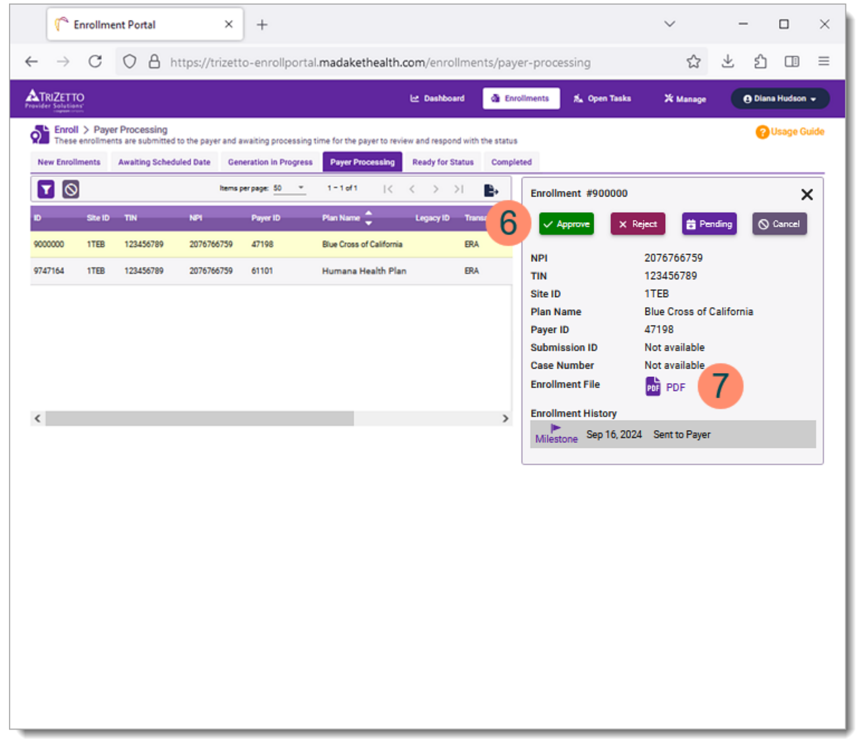
Payer Processing Tab, cont.

6. To manually update the enrollment status, click the applicable status.
   - *Approve:* Click this option when the payer has approved the enrollment. Enter the date of approval and click **Approve** to move the enrollment to the Completed tab.
   - *Reject:* Click this option when the payer has rejected the enrollment. Then, select the rejection reason to move the enrollment to the Completed tab.
   - *Pending:* Click this option to indicate the enrollment is "Payer still processing", "Awaiting claims submission", or "Payer no response".
   - *Cancel:* Click this option to indicate the enrollment is canceled. Then, select the cancellation reason.
     Note: Once an enrollment is sent to the payer, it cannot be stopped. Selecting this option only cancels the enrollment within the TriZetto Enrollment Portal.



7. To view the enrollment document submitted to the payer, click the **PDF** icon. The file is saved to the computer.

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Ready for Status Tab

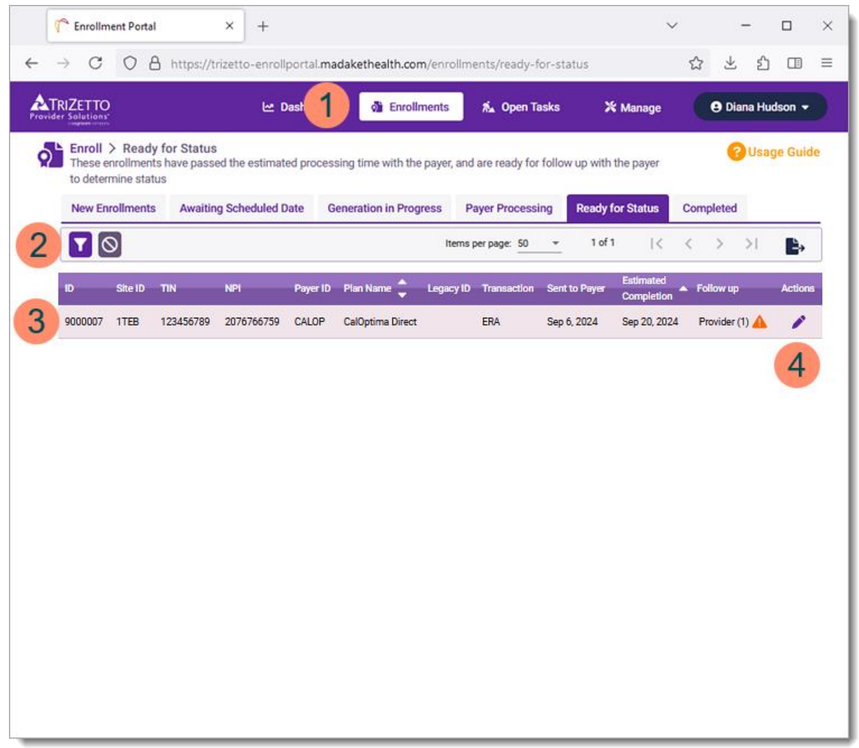
The Ready for Status tab displays enrollments that have passed the estimated processing time with the payer and follow up with the payer is required to determine status. The enrollment also displays the follow up method and status for each plan and service.

1. Click **Enrollments**. The *Enroll* page opens to the *Ready for Status* tab.

2. Click the **filter** icon to select available filters (e.g., Payer ID/Plan Name, NPI, TIN) to view specific enrollments. Then, click **Search**.
   - To remove the filter(s), click the **stop** icon.

3. Each enrollment has a unique ID associated with the enrolled plan and the *Follow Up* method (e.g., Manual Portal Verification).
   Tip: Click **Usage Guide** to learn more about each follow up method and the required actions.

4. Click the **pencil** icon to update the enrollment status, review files, review the enrollment history, or review the payer's contact information (if available). The enrollment panel displays.



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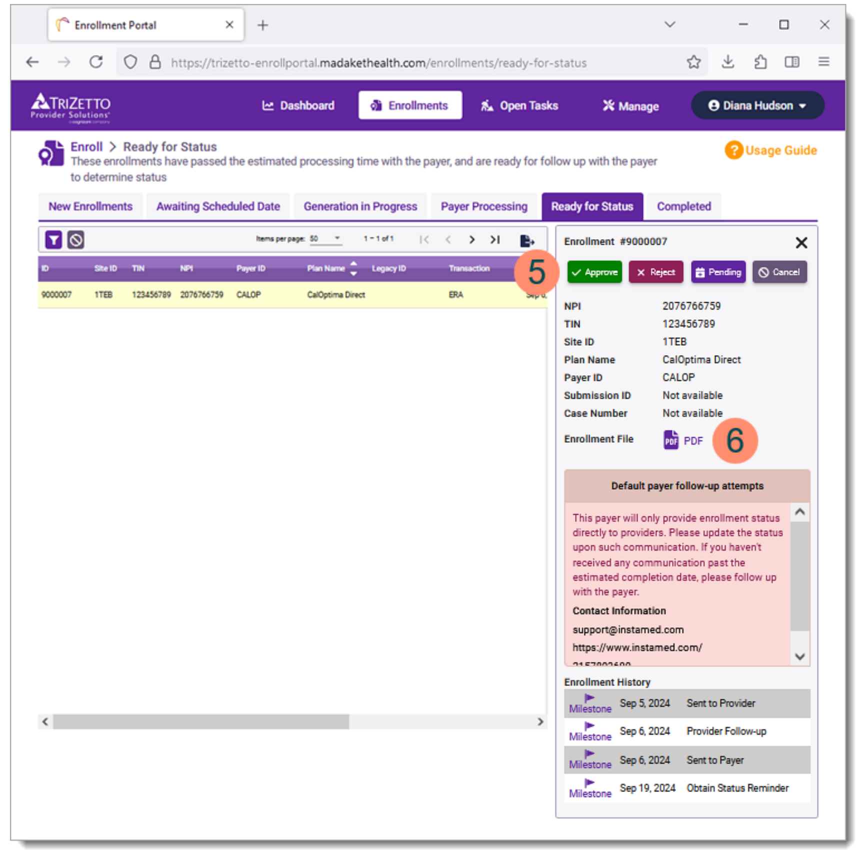
Ready for Status Tab, cont.

5. To manually update the enrollment status, click the applicable status.
    - *Approve:* Click this option when the payer has approved the enrollment. Enter the date of approval and click **Approve** to move the enrollment to the Completed tab.
    - *Reject:* Click this option when the payer has rejected the enrollment. Then, select the rejection reason to move the enrollment to the Completed tab.
    - *Pending:* Click this option to indicate the enrollment is “Payer still processing”, “Awaiting claims submission”, or “Payer no response”. Then, select a *Next Follow-up Date* and click **Update Enrollment** when finished.
    - *Cancel:* Click this option to indicate the enrollment is canceled. Then, select the cancellation reason. Note: Once an enrollment is sent to the payer, it cannot be stopped. Selecting this option only cancels the enrollment within the TriZetto Enrollment Portal.



6. To view the enrollment document submitted to the payer, click the **PDF** icon. The file is saved to the computer.

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Completed Tab

The Completed tab displays enrollments that have been marked completed with status from the payer or because they were canceled or rejected by a user. The enrollment also displays the resolution state indicating the status and notes related to the rejection/cancellation.

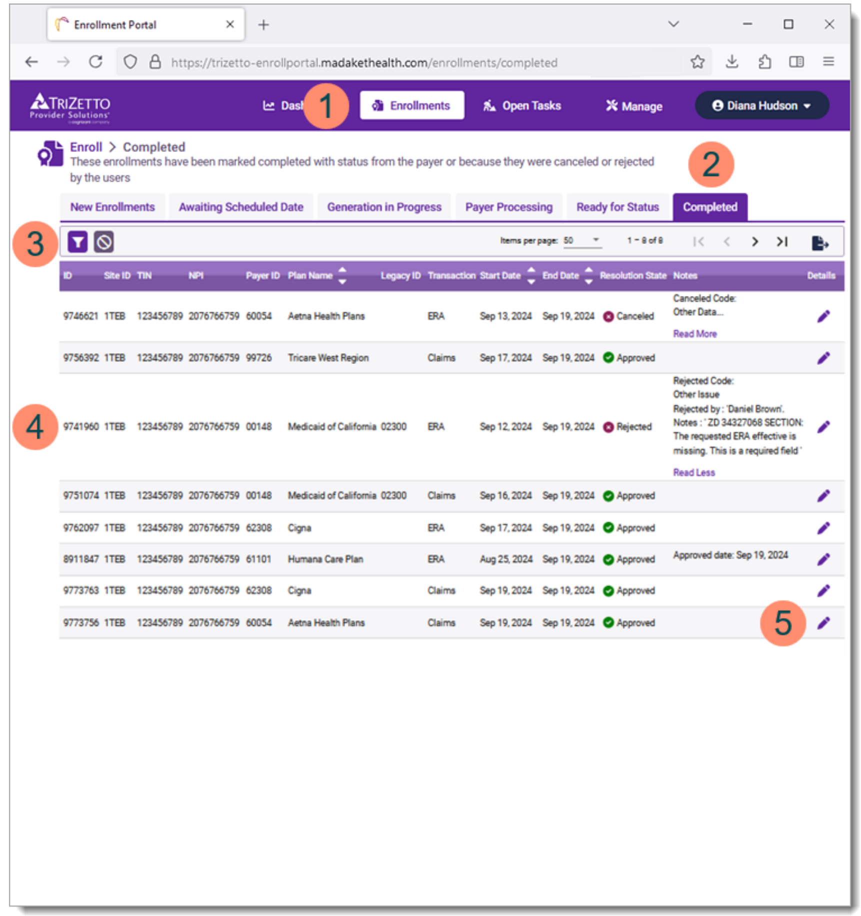
1. Click **Enrollments**. The *Enroll* page opens to the *Ready for Status* tab.

2. Click the *Completed* tab. The *Completed* page opens.

3. Click the **filter** icon to select available filters (e.g., Payer ID/Plan Name, NPI, TIN) to view specific enrollments. Then, click **Search**.
   - To remove the filter(s), click the **stop** icon.

4. Each enrollment has a unique ID associated with the enrolled plan, *Resolution State* (enrollment status), and *Notes*.
   - If applicable, click **Read More** to review the full note.
   - If the enrollment was rejected, review the notes and submit a new enrollment for the payer once the reason for the rejection has been fixed.

5. Click the **pencil** icon to review the file or the enrollment history. The enrollment panel displays.
   - To view the enrollment document submitted to the payer, click the **PDF** icon. The file is saved to the computer.



Navigate Open Tasks

Open Tasks displays all tasks that require an action from the practice or provider. Users who are set up to receive emails from Madaket will be notified when tasks need to be completed. Tasks must be completed within 45 business days. Madaket will continue to follow up with the user about the tasks for the first 15 days. If the enrollment tasks are not completed within 45 business days, the enrollment request will be closed and marked as “no response from the provider”.

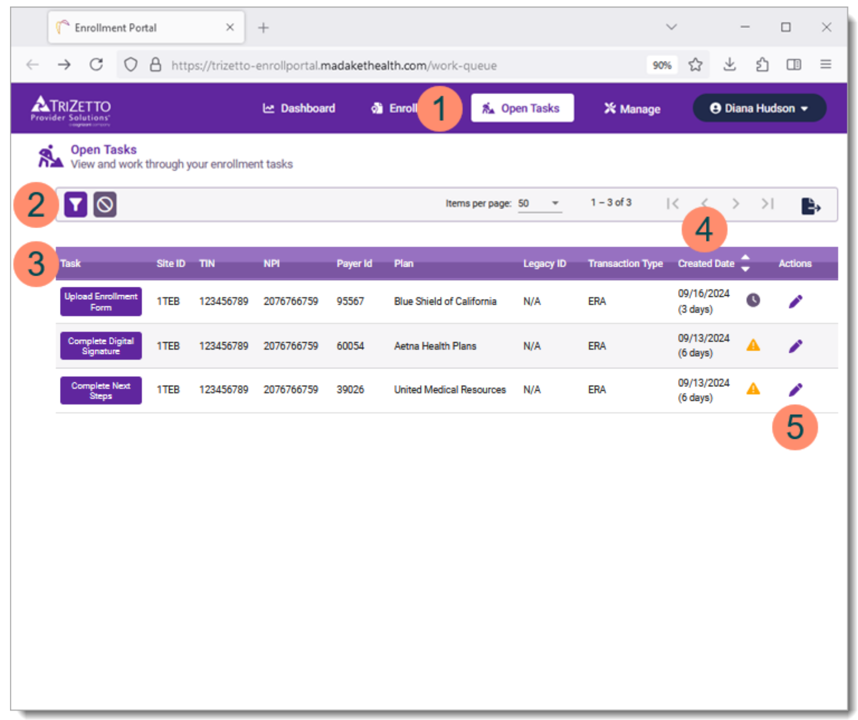
1. Click **Open Tasks**. The *Open Tasks* page opens.

2. Click the **filter** icon to select available filters (e.g., Payer ID/Plan Name, NPI, TIN, Task Type) to view specific tasks. Then, click **Search**.
   - To remove the filter(s), click the **stop** icon.

3. There are three task types: *Complete Digital Signature, Complete Next Steps,* and *Upload Enrollment Form*. Review the Complete Digital Signature Task, Complete Next Steps Task, or Upload Enrollment Form Task section to learn how to complete the task.

4. The *Created Date* displays how long the task has been open.

5. If applicable, click the **pencil** icon to cancel the enrollment. The enrollment panel displays. Click **Cancel**. Then, select the cancellation reason.
   Note: Once an enrollment is sent to the payer, it cannot be stopped. Selecting this option only cancels the enrollment within the TriZetto Enrollment Portal.



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Complete Digital Signature Task

The Complete Digital Signature task is created when the payer allows the enrollment forms to be signed electronically. Multiple digital signature tasks may be grouped together when the enrollment request was submitted the same day for the practice or provider.

Note: The person signing the form must be authorized to sign to prevent enrollment rejections.

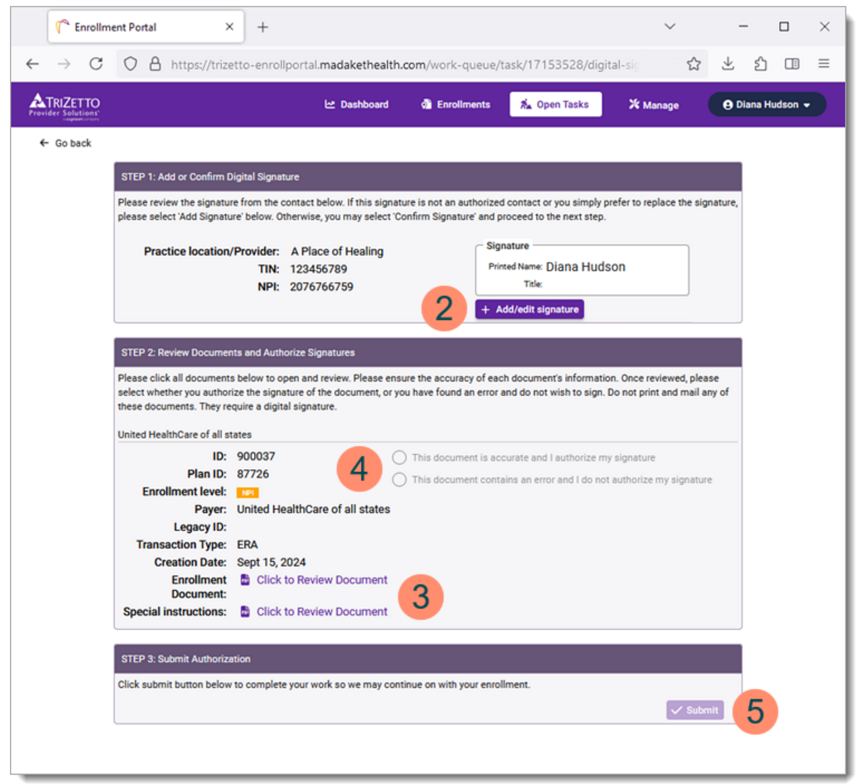
1. Click **Complete Digital Signature**. The *Complete Digital Signature* page opens.

2. Click **Add/edit signature**. The signature section displays.
    a. *Signature Name:* Leave the name as is or replace the name if the person is not an authorized signer.
    b. *Signature Title:* Enter the title of the person signing the form. The title should match what the payer has on file.
    c. *Select Font:* If applicable, select a different font.
    d. Click **Confirm** to continue.

3. Click the document(s) to save the file to the computer.

4. After reviewing the documents, select if the document is accurate or contains an error.
    - If there is an error with the documents, select how to proceed.

5. Click **Submit** to digitally sign the forms.

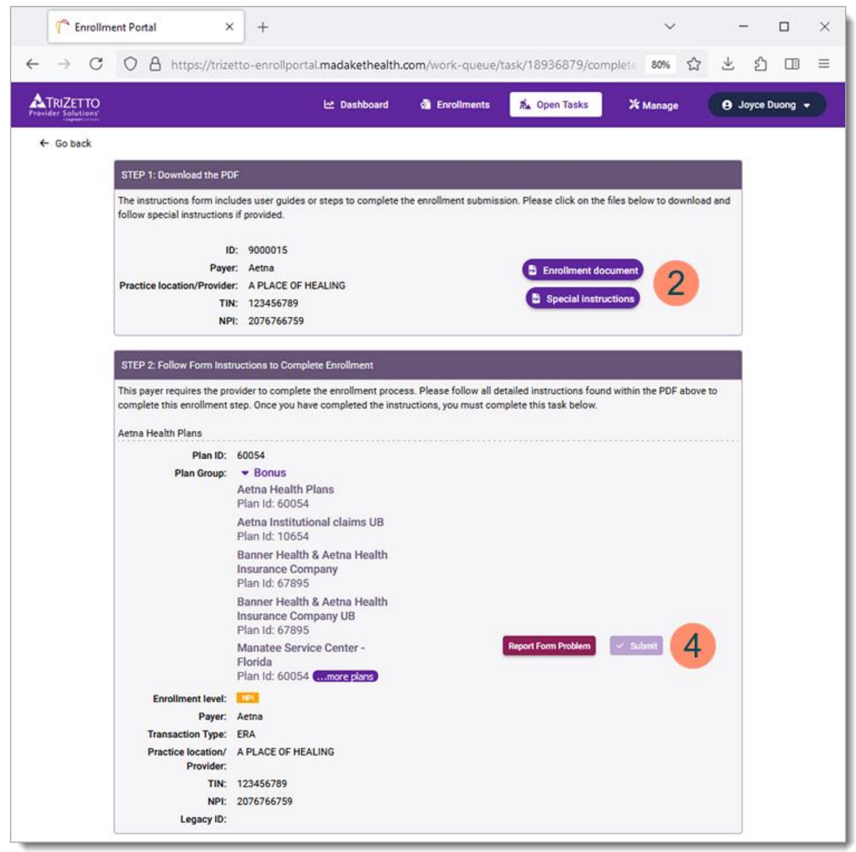


Complete Next Steps Task

The Complete Next Steps task is created when a payer requires the enrollment paperwork to be completed online, or the payer requires the enrollment forms to be printed and faxed/mailed to the payer. Review the documents in the task for specific payer instructions to proceed with enrollment.

Note: To successfully complete the enrollment, it is important to follow the payer’s instructions outlined in the documents.

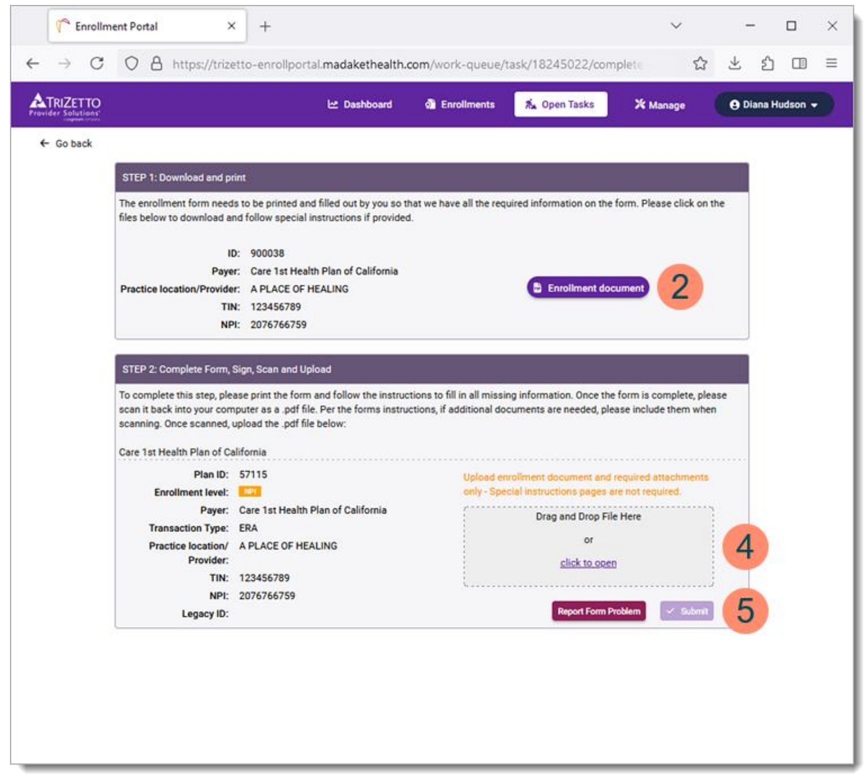
1. Click **Complete Next Steps**. The *Complete Next Steps* page opens.
2. Click the document(s) to save the file to the computer.
3. Review the documents. Then, complete the required actions.
4. Once the tasks are completed, click **Submit**.
   - If there is an error with the documents, click **Report Form Problem** and follow the prompts.



Upload Enrollment Form Task

The Upload Enrollment Form task is created when the payer requires an original (wet signature), or additional documentation (e.g., W-9, tax forms, bank letter, voided check, notary) is required.

1. Click **Upload Enrollment Form**. The *Upload Enrollment Form* page opens.
2. Click the document(s) to save the file to the computer.
3. Review the documents. Then, complete the required actions.
4. Once the tasks are completed, drag and drop a file or click **click to open** to upload the form(s).
5. Click **Submit** when finished.
   - If there is an error with the documents, click **Report Form Problem** and follow the prompts.



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Learn More

Frequently Asked Questions

Review the TriZetto Enrollment Portal FAQs help article to review frequently asked questions.

Help Center

Access helpme.tebra.com to view additional help resources, monthly product release notes, help articles, guides, training videos, contact Customer Care, and more.

Tebra University

Log into app.kareo.com to access Tebra University and register for live trainings, view pre-designed courses and eLearnings. Review the Tebra University help article to learn more.

Admin Setup Guide Part 1

System Administrators will learn how to configure the practice's settings in the web platform (e.g., Clinical, Engage). They will add insurances, set up users, add service locations, manage provider profiles, configure calendar settings, activate patient communications, and much more.

Admin Setup Guide Part 2

Continue to Admin Setup Guide Part 2 for instructions to configure practice settings and provider billing settings in the Desktop Application (PM). You will learn how to set up insurance companies/plans, payer connections, fee schedules, and more.

Guides

Review the *Billing* section of the User Guides page for additional resources to help set up your practice for success.

The Digital Backbone for Practice Success

Tebra is the digital backbone built for both patient and provider well-being. From practice growth technology to clinical and financial software, our complete operating system is structured to modernize every step of the patient journey and support the connected practice of the future.