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## Revision History

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<td>1/1/2016</td>
<td>1</td>
<td>Steven Tackett</td>
<td>Initial version.</td>
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Introduction to the Third Party Administrator (TPA) Web Portal

TPA Web Portal User Sign In

User Sign In Screen

- SELECT NEW ACCOUNT REGISTRATION IF ONE HAS NOT BEEN ESTABLISHED
- ENTER USER NAME AND PASSWORD
TPA Web Portal User Registration

Create account

- Username:
- Email:
- Password:
- Confirmation Password:
- Third Party Administrator Name:
  - Select Company
- Company is a Pharmacy Benefits Manager:
- Contact First Name:
- Contact Last Name:
- Contact Title:
- Contact Phone Number:
- Address:
- Address 2:
- City:
- State:
- Zip Code:
- Address information is the same:
- Record Keeping Location:
  - Record Keeping Location is foreign address:
  - Address:
  - Address 2:
  - City:
  - State:
  - Zip Code:

Sign Up
WEB USER REGISTRATION

- **USERNAME** - ACCOUNT USERNAME (UNIQUE)
- **EMAIL** - ACCOUNT EMAIL ADDRESS
- **PASSWORD** - NEEDS TO COMPLY WITH PASSWORD RULES (1 UPPER CASE, 1 LOWER CASE, 1 NUMBER OR SPECIAL CHARACTER, AND 8 CHARACTERS IN LENGTH)
- **CONFIRMATION PASSWORD** - CONFIRMS THAT PASSWORD MATCHES
- **IS PHARMACY BENEFITS MANAGER** - DENOTES IF ACCOUNT COMPANY IS A PHARMACY BENEFITS MANAGER
- **QTR RPT** - DENOTES IF ACCOUNT COMPANY IS CURRENTLY ON QUARTERLY REPORTING
- **COMPANY NAME** - SELECTABLE COMPANY NAME (UNIQUE)
- **CONTACT FIRST NAME** - CONTACT PERSON'S FIRST NAME
- **CONTACT LAST NAME** - CONTACT PERSON'S LAST NAME
- **CONTACT TITLE** - CONTACT PERSON'S TITLE
- **CONTACT PHONE** - CONTACT PHONE NUMBER
- **CONTACT PHONE EXT** - CONTACT PHONE EXTENSION
- **IS CONTACT FOREIGN** - DENOTES IF CONTACT ADDRESS IS A FOREIGN ADDRESS
- **CONTACT ADDRESS** - CONTACT ADDRESS
- **CONTACT ADDRESS 2** - CONTACT ADDRESS (SECOND LINE, IF NEEDED)
- **CONTACT CITY** - CONTACT CITY (PROVINCE/REGION IF FOREIGN)
- **CONTACT STATE** - CONTACT STATE (COUNTRY IF FOREIGN)
- **CONTACT ZIP CODE** - CONTACT ZIP (POSTAL CODE IF FOREIGN)
- **IS RECORD KEEPING LOCATION FOREIGN** - DENOTES IF PHYSICAL RECORDS ARE MAINTAINED IN A FOREIGN LOCATION
- **RECORD KEEPING LOCATION ADDRESS** - RECORD KEEPING ADDRESS
- **RECORD KEEPING LOCATION ADDRESS 2** - RECORD KEEPING ADDRESS (SECOND LINE, IF NEEDED)
- **RECORD KEEPING LOCATION CITY** - RECORD KEEPING CITY (PROVINCE/REGION IF FOREIGN)
- **RECORD KEEPING LOCATION STATE** - RECORD KEEPING STATE (COUNTRY IF FOREIGN)
- **RECORD KEEPING LOCATION ZIP** - RECORD KEEPING ZIP CODE (POSTAL CODE IF FOREIGN)
TPA Web Portal User Dashboard

User Dashboard Screen

SUBMITTED DOCUMENTS

- FORM NAMES ACT AS LINK TO FORMS
- CHECK MARKS WILL IDENTIFY FORMS THAT HAVE BEEN SUBMITTED
TPA Web Portal Annual Statement Summary

Annual Statement Summary Screen

Completion of Annual Financial Statement Summary

- ALL FIELDS MUST BE COMPLETED TO BE SUBMITTED
- EACH AMOUNT FIELD ALLOWS UP TO 15 DIGITS TO BE ENTERED
- FIELDS ARE LIMITED TO WHOLE DOLLAR AMOUNTS ONLY
- ALL NEGATIVE AMOUNTS ARE DISPLAYED IN RED AND WITH PARENTHESES
- FORMATTING IS APPLIED AFTER AMOUNTS ARE ENTERED
- PHARMACY BENEFITS MESSAGE IS BASED UPON THE ACCOUNT REGISTRATION SCREEN
TPA Web Portal Quarterly Statement Summary

Quarterly Statement Summary Screen

Completion of Quarterly Financial Statement Summary

- ALL FIELDS MUST BE COMPLETED TO BE SUBMITTED
- EACH AMOUNT FIELD ALLOWS UP TO 15 DIGITS TO BE ENTERED
- FIELDS ARE LIMITED TO WHOLE DOLLAR AMOUNTS ONLY
- ALL NEGATIVE AMOUNTS ARE DISPLAYED IN RED AND WITH PARENTHESIS
- FORMATTING IS APPLIED AFTER AMOUNTS ARE ENTERED
- PHARMACY BENEFITS MESSAGE IS BASED UPON THE ACCOUNT REGISTRATION SCREEN
TPA Web Portal Insurer/Trust Agreements

Completion of the Insurer/Trust Agreements Form

- A VALID PAID INVOICE MUST BE ENTERED FOR FORM TO BE SUBMITTED
- ONCE ENTRIES HAVE BEEN MADE IN A ROW, ALL FIELDS HAVE TO BE COMPLETED
- TO DELETE A ROW
  1. SELECT THE CHECKBOX IN THE FAR LEFT COLUMN
  2. SELECT THE DELETE ROW BUTTON
- THE GREEN CHECK ICON WILL APPEAR UNDER THE DETAILS COLUMN, ONCE THE QUESTIONNAIRE PAGE(S) (FOR THE INSURER OR TRUST LISTED IN THE ROW) HAS BEEN COMPLETED AND SAVED.
- ALL FIELDS IN A ROW (EXCEPT FOR THE SECOND ADDRESS FIELD) MUST BE COMPLETED BEFORE THE FORM CAN BE SAVED
- FORM CAN ONLY BE SUBMITTED ONCE THE FOLLOWING ARE COMPLETE
  1. VALID PAID INVOICE NUMBER IS ENTERED
  2. ALL ROWS SHOW THE GREEN CHECK ICON, UNDER THE DETAILS COLUMN
  3. THE FORM HAS BEEN SAVED
TPA Web Portal Questionnaire

Questionnaire Screen

ENTERING ENTITY DETAILS

- Selection of “NO DETAILS” will satisfy all rules on page.
- Only one “TYPE OF ENTITY” can be selected.
- Using the Ctrl key allows the selection of multiple “SERVICES PROVIDED”.
- To delete a row
  1. Select the checkbox in the far left column
  2. Select the delete row button
- All fields in a row (except for the ERISA field) must be completed before the form can be saved
- Once entries have been made in a row, all fields have to be completed
TPA Web Portal TPA 376.1092 Renewal

TPA 376.1092 Renewal Screen

COMPLETION OF THE 376.1092 RENEWAL FORM

- EACH QUESTION MUST BE ANSWERED
- IF “YES” IS ANSWERED:
  1. THE “IF YES, PROVIDE AN EXPLANATION” COMMENT FIELD APPEARS FOR THAT QUESTION
  2. THE “BROWSE” BUTTON WILL UNLOCK, FOR NAVIGATION TO THE .PDF DOCUMENT THAT WILL SUPPORT THE “YES” ANSWER
  2.1. MULTIPLE FILES MAY BE SELECTED FOR SUPPORT OF THE “YES” ANSWER.
TPA Web Portal Document Upload

**Document Upload Screen**

![Document Upload Screen Image]

**USING THE DOCUMENT UPLOAD SCREEN**

- **USE THE “BROWSE” FOR NAVIGATION TO THE .PDF DOCUMENT**
- **SELECT THE DOCUMENT TYPE, WHICH MOST CLOSELY DESCRIBES THE DOCUMENT BEING UPLOADED**
- **DOCUMENTS MUST BE IN THE .PDF FORMAT AND CANNOT EXCEED 15 MB**
- **DOCUMENTS THAT CONTAIN PERSONALLY IDENTIFIABLE INFORMATION (PII), SUCH AS BIOGRAPHIES, MUST BE PHYSICALLY MAILED**
Contact

Contact TPA Administration

USER CONTACT SELECTION

- ENTER CONTACT INFORMATION OR SELECT THE “USE ACCOUNT INFORMATION” BOX
- ADD COMMENTS (UP TO 1000 CHARACTERS) AND SELECT “SUBMIT”