ONB✷ARD

Registration, Access and Administration for Payers, Pharmacy Benefit Managers and Medical Review Organizations through the Medical Portal

Table of contents

I. Overview

Users need access to the Medical Portal to use OnBoard: Limited Release to submit and respond to Prior Authorization Requests (PARs) and *Requests for Decision on Unpaid Medical Bills (Form HP-1.0)*. Some users may already have access and will not need to request access again. The information in this guide details who needs access, how to request (or register) for access, and how to designate and manage user roles in the system.

II. Medical Portal access: who has it, and who needs it?

User type	Details
Payers (insurers, third-party administrators, self-insured employers)	**Payers** who already have access to the Medical Portal for Drug Formulary prior authorizations **are automatically registered** for OnBoard. A second registration in not required.
Pharmacy Benefit Managers (PBMs)	PBMs who already have access to the Medical Portal are automatically registered for OnBoard. PBMs not registered for the Medical Portal must complete the online PBM Medical Portal Registration process.
Medical Review Organizations (MRO)	MROs must complete the online Medical Review Organization Medical Portal Registration process.

III. Role types

The PAR review process involves several roles that need to be assigned in the system. Each role has specific responsibilities in the PAR review process. The following outlines the role types for payers, PBMs and MROs.

Payer Roles	Responsibilities
Online (User) Administrator *Payers must assign someone as an Online (User) Administrator.*	• Requests access for users and User Administrators. • Assigns users to Workload Administrator, Level 1, and Level 2 Reviewer roles. • Provides email contacts for PAR notifications. • Designates MRO for PAR reviews. • Designates PBM for Level 1 Medication PAR reviews. • Updates user information as necessary. • Removes users who should no longer have access to the system.
Workload Administrator *There must be a Workload Administrator for each PAR type, and Workload Administrators may have more than one role type outlined in this section.*	• Receives and assigns all submitted PARs based on one of the following Workload Administrator role types: **MTG/Non-MTG** – assigns MTG Confirmation, MTG Variance, MTG Special Services, Non-MTG Over $1000 and Non-MTG Under or = $1000 PARs to appropriate reviewers. **Medication** – assigns Medication PARs to appropriate reviewers. **DME** – assigns DME PARs to appropriate reviewers. • Changes delegated reviewers due to situations such as a delegate being absent from work or a change in a delegate's role within the organization.
Level 1 Reviewer *There can be a Level 1 Reviewer for each of the seven PAR types. Level 1 reviews may be assigned to an MRO for any PAR and a PBM for Medication PARs.*	• Reviews Level 1 PAR requests as designated and assigned.
Level 2 Reviewer *There must be a Level 2 Reviewer, the payer's physician, if an MRO is not designated for that Level 2 PAR type.*	• Reviews Level 2 PAR requests as designated and assigned.

| PBM Roles	Responsibilities
Online (User) Administrator *PBMs must assign someone as an Online (User) Administrator.*	• Request access for users in the system. • Assigns users to Workload Administrator and Level 1 Reviewer roles for Medication PARs. • Update user information as necessary. • Removes users who should no longer have access to the system.

Workload Administrator	• Receives and assigns all Medication PARs. • Change delegated reviewers due to situations such as a delegate being absent from work or a change in a delegate's role within the organization.
Level 1 Reviewer	• Review Level 1 Medication PARs as designated and assigned.

MRO Roles	Responsibilities
Online (User) Administrator *MROs must assign someone as an Online (User) Administrator.*	• Requests access for users in the system. • Assigns users to Workload Administrator, Level 1, and Level 2 Reviewer roles. • Updates user information as necessary. • Removes users who should no longer have access to the system.
Workload Administrator	• The workload administrator will receive and assign all submitted PARs. • Change delegated reviewers due to situations such as a delegate being absent from work or a change in a delegate's role within the organization.
Level 1 Reviewer *Level 1 Reviewers can be assigned to any PAR type.*	• Review Level 1 requests as designated and assigned.
Level 2 Reviewer *There must be a Level 2 Reviewer for each PAR type*	• Review Level 2 requests as designated and assigned.

IV. Requesting access to the Medical Portal - PBMs and MROs
Reminder – payers and PBMs who already have access to the Medical Portal for Drug Formulary prior authorizations are automatically registered for OnBoard. A second registration in not required.

1. Visit wcb.ny.gov/medicalportal.
2. Select Access and Administration under Payers.
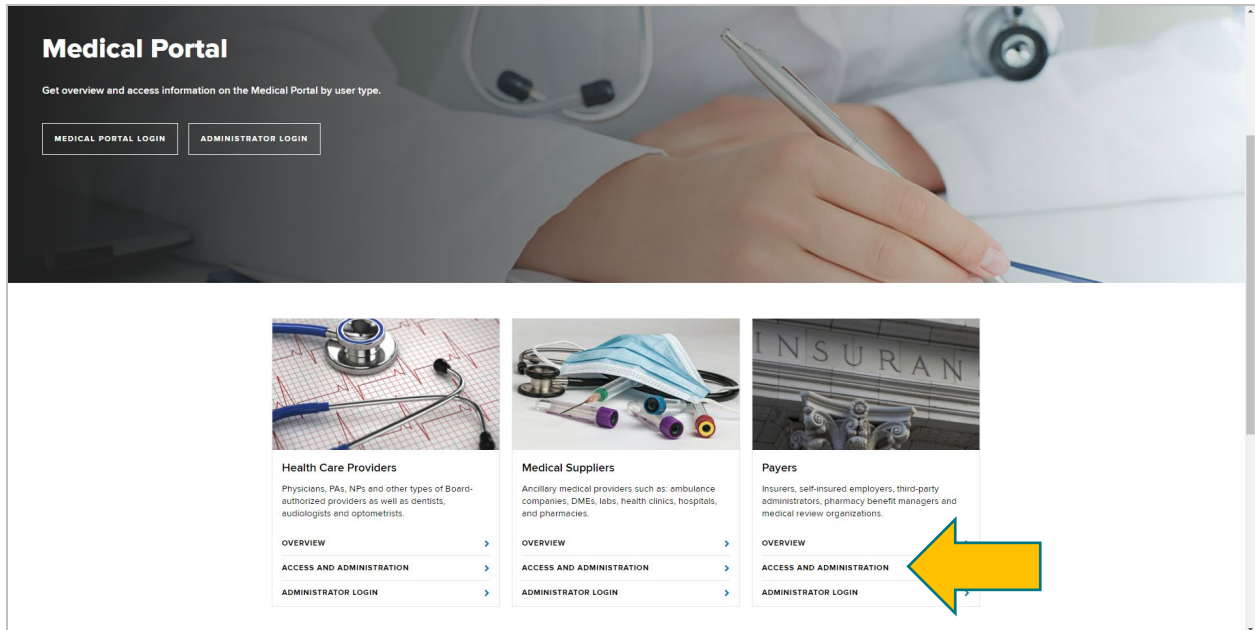
3. Select Accessing the Medical Portal.
4. Select either PBM Medical Portal Registration or Medical Review Organization Medical Portal Registration.
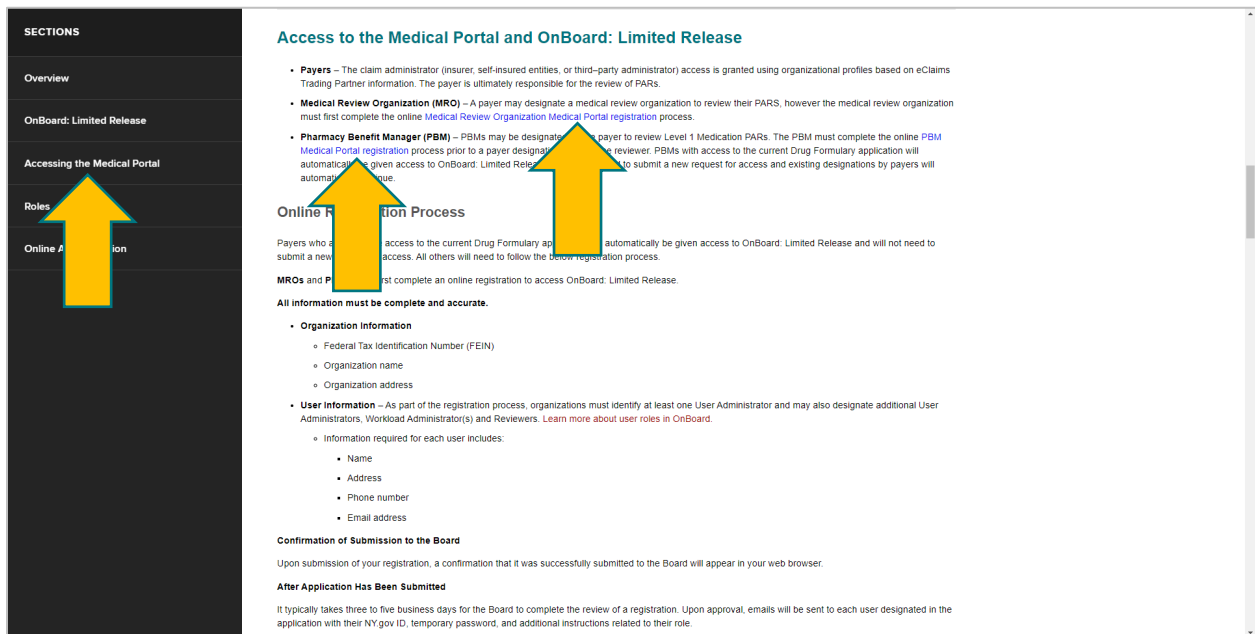
5. Enter the required information. *Please note – you cannot save work. Completing the online form must be done in one sitting.*

Organization information required: Federal Tax Identification Number (FEIN), organization name and organization address.

User information: Organizations must first identify at least one **User Administrator** and may also designate additional **User Administrators**, **Workload Administrator(s)**, and **Reviewers** for various levels. The following information is required for each user: name, address, phone number and email address. See section IV for a definition of the various role types.

Pharmacy Benefit Managers Registration

1. Begin by entering PBM information and select the right arrow or the **User Information** tab to continue.

2. Select the role type checkbox for the user being entered and input the required information. If your organization has not registered an Online (User) Administrator, register their information first. If you are registering more than one user, select **Add User**. The Online (User) Administrator may add additional reviewers and administrators through Medical Portal Administration after being sent their User ID and Password. Select the user role link to learn more about that role type.

3. Continue adding in user information for any user type. When all information is entered, select **Submit**.

Form fields visible:

Michael | Smith

*Address Line 1: 1 Allen Avenue | Address Line 2: Suite, room or floor

*City: CityName | *State: New York | *Zip Code: 13245

*Area Code: 555 | Phone Number: 555-5555 | Extension: 555

*Email: PBMemail@email.com

Portal Role:
☐ Work Load Administrator - Will Assign Tasks - More Info
☐ Reviewer - Will Respond to Asigned Tasks - More Info

User Administration:
☐ Will Manage Work Load Administrators and Reviewers for this PBM - More Info

*First Name: First Name | M.I.: | *Last Name: Last Name

*Address Line 1: First line of address | Address Line 2: Suite, room or floor

*City: City | *State: New York | *Zip Code:

*Area Code: 123 | *Phone Number: 123-4567 | Ext:

*Email: name@example.com

[Add User] [Remove User]

[Submit]   [Cancel Registration]

4. After selecting **Submit**, the Registration Complete webpage will show.

It may take up to three to five business days for the Board to complete the review of your registration. Once approved, emails will be sent to each individual user designated in the registration with their NY.gov ID and temporary password to access the system, along with additional instructions related to their role(s)

Medical Review Organizations Registration

1. Begin my entering MRO information and select **Next** or the **User Information** tab.

2. Select the role type checkbox for the user being entered and input the required information. If your organization has not registered an Online (User) Administrator, register their information first. If you are registering more than one user, select **Add User**. The Online (User) Administrator may add additional reviewers and administrators through Medical Portal Administration after being sent their User ID and Password.

3. Continue adding in user information for any user type. Select the user role link to learn more about that role type. When all information is entered, select **Submit**.

4. After selecting **Submit**, the Registration Complete webpage will show.

It may take up to three to five business days for the Board to complete the review of your registration. Once approved, emails will be sent to each individual user designated in the application with their NY.gov ID and temporary password to access the system, along with additional instructions related to their role(s).

V. Managing roles and notifications

The Online (User) Administrator for Payers, PBMs and MROs can manage their organization email notifications and assign users to roles. They will log in using their Medical Portal NY.gov ID and password.

1. Visit wcb.ny.gov/medicalportal.
2. Select Administrator Login.
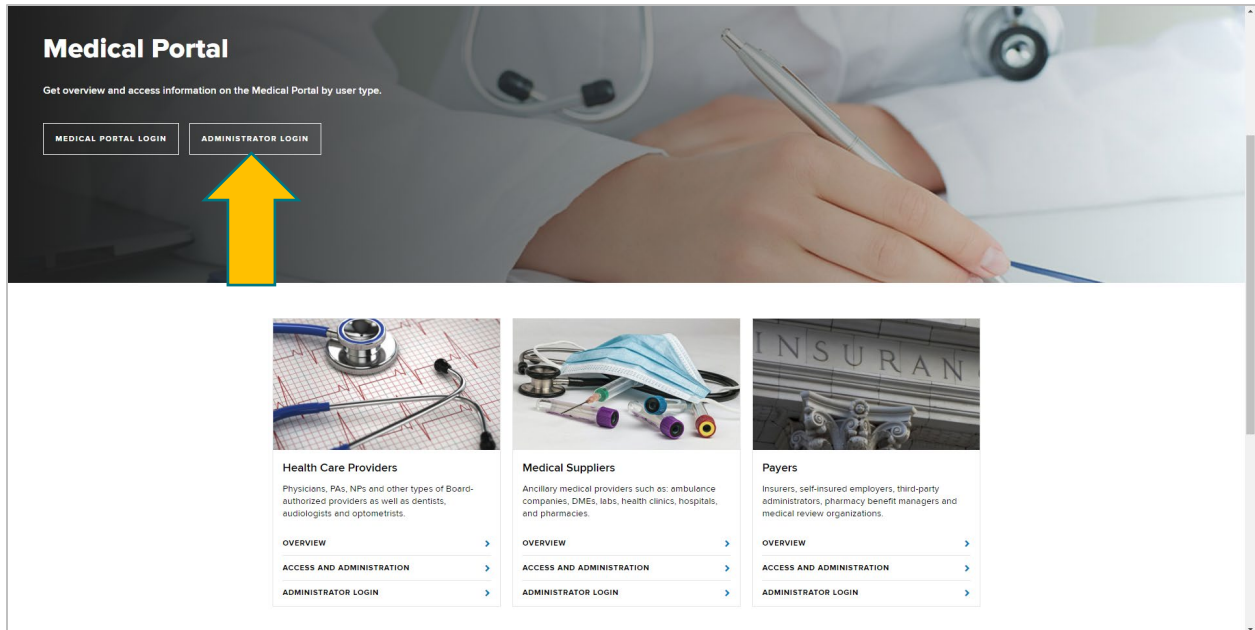
3. Begin assigning notification contacts and users to the various roles in the dashboard.

Managing organization email notifications

1. Under **Notifications**, select one of the roles listed under a PAR type.
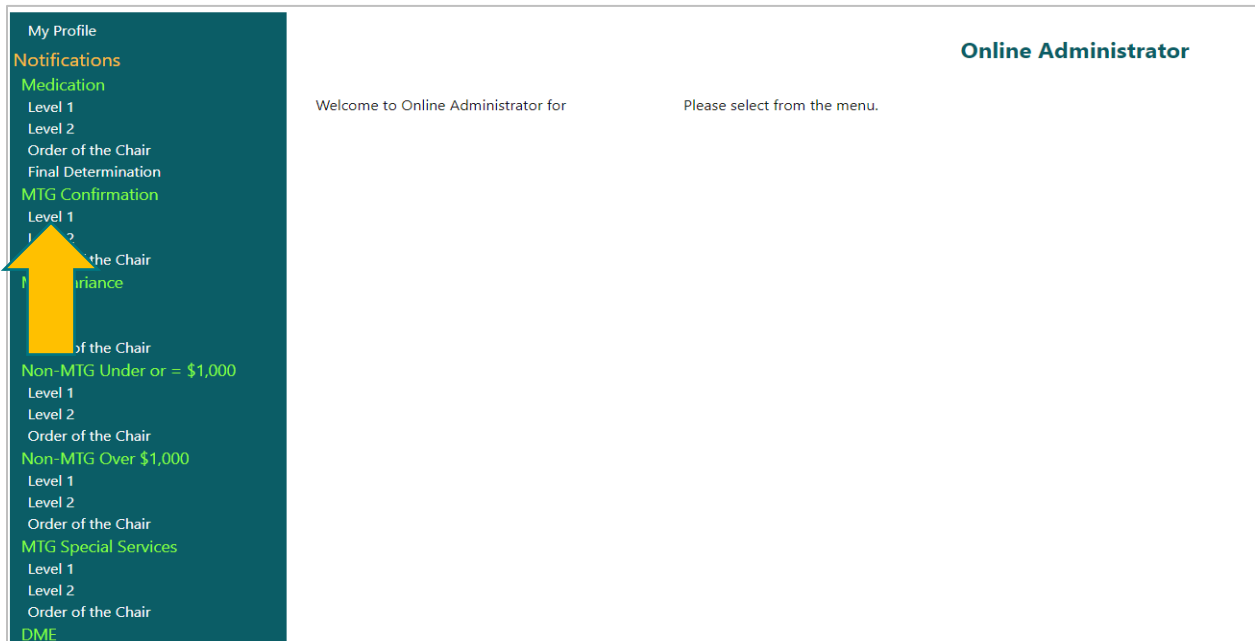
2. Add or update current email in **Email Should Be** boxes and select **Update [Role] Organization** at the bottom of the page. Note - the top row has an **Apply to All** feature when multiple organizations are listed.

Workers' Compensation Board

Workers   Employers   Health Care Providers   Payers   Representatives   Forms   Locations

Search WCB

Language Assistance: (877) 632-4996 | Language Access Policy   Español | Русский | Polski | 中文 | Italiano | Kreyòl ayisyen | 한국어

My Profile
Notifications
Medication
  Level 1
  Level 2
  Order of the Chair
  Final Determination
MTG Confirmation
  Level 1
  Level 2
  Order of the Chair
MTG Variance
  Level 1
  Level 2
  Order of the Chair
Non-MTG Under or = $1,000
  Level 1
  Level 2
  Order of the Chair
Non-MTG Over $1,000
  Level 1
  Level 2
  Order of the Chair
MTG Special Services
  Level 1
  Level 2
  Order of the Chair
DME
  Level 1
  Level 2

Online Administrator

Contact Information for MTG Confirmation Level 1

Claim Administrators for

Organization	ID	Current Email	Email Should Be	Name of MRO
Apply To ALL				
ACE American Insurance Co.	W019004	newconfirm2@wcb.ny.gov		testURAC4
ACE Fire Underwriters Insurance Company	W011001	confirm1@wcb.ny.gov		---
ACE Property and Casualty Insurance Company	W012009	confirm1@wcb.ny.gov		URAC_6
AGCS MARINE INSURANCE COMPANY	W119259	confirm1@wcb.ny.gov		URAC_8
				testURAC4
AIG Property Casualty Company	W045009	confirm1@wcb.ny.gov		---
AIU Insurance Company	W015754	confirm1@wcb.ny.gov		---
ARCH INSURANCE CO	W087381	confirm1@wcb.ny.gov		---
Acadia Insurance Company	W010250	confirm1@wcb.ny.gov		---

Transportation Insurance Co.	W211007	confirm1@wcb.ny.gov		---
Travelers Casualty & Surety Company	W010003	confirm1@wcb.ny.gov		---
Travelers Casualty & Surety Company of America	W010631	confirm1@wcb.ny.gov		---
Travelers Casualty Company	W039507	confirm1@wcb.ny.gov		---
Travelers Casualty Company of Connecticut	W010698	confirm1@wcb.ny.gov		---
Travelers Casualty Insurance Company Of America	W010508	confirm1@wcb.ny.gov		---
Travelers Commercial Insurance Co.	W010755	confirm1@wcb.ny.gov		---
Travelers Indemnity Company	W212005	confirm1@wcb.ny.gov		---
Travelers Indemnity Company of America	W212252	confirm1@wcb.ny.gov		---
Travelers Indemnity Company of Connecticut	W212500	confirm1@wcb.ny.gov		---
Travelers Property Casualty Company Of America	W212757	confirm1@wcb.ny.gov		---
Travelers Property Casualty Insurance	W213508	confirm1@wcb.ny.gov		---
United States Fidelity and Guaranty Co.	W220008	confirm1@wcb.ny.gov		---
Valley Forge Insurance Co.	W224000	confirm1@wcb.ny.gov		---
Vigilant Insurance Company	W225007	confirm1@wcb.ny.gov		---
Zurich American Insurance Co.	W228001	confirm1@wcb.ny.gov		---

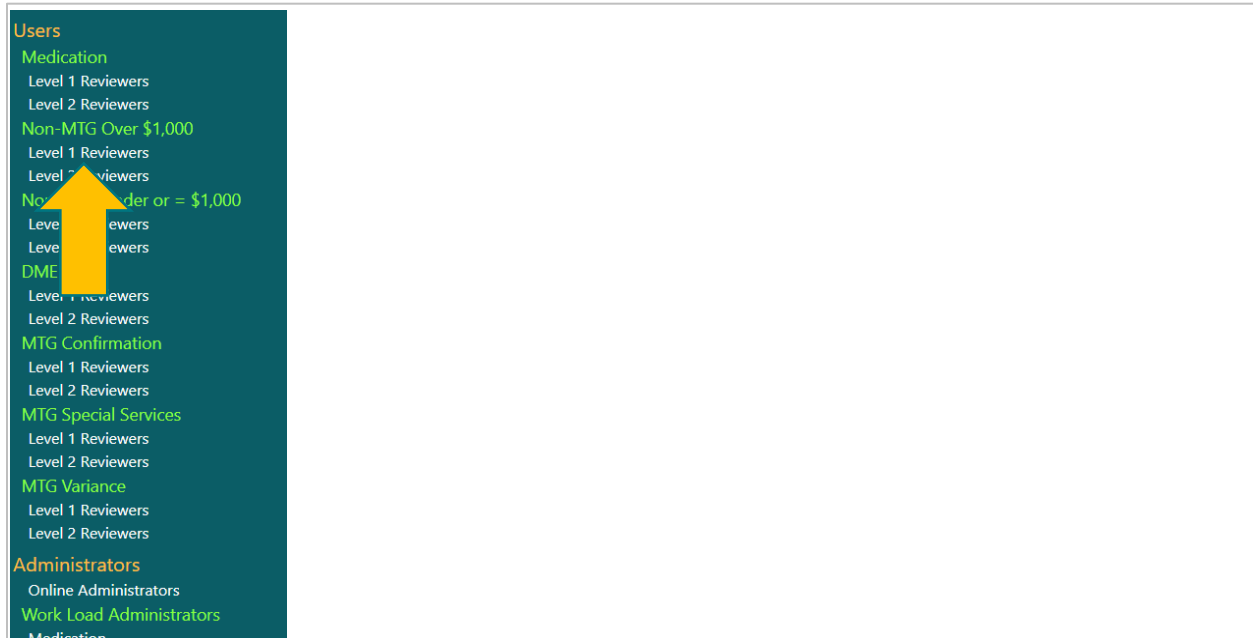Showing 1 to 87 of 87 entries

[Update Level 1 Organization]

3. A pop up will appear, confirming any changes. Select **Close**, and the changes will be made.
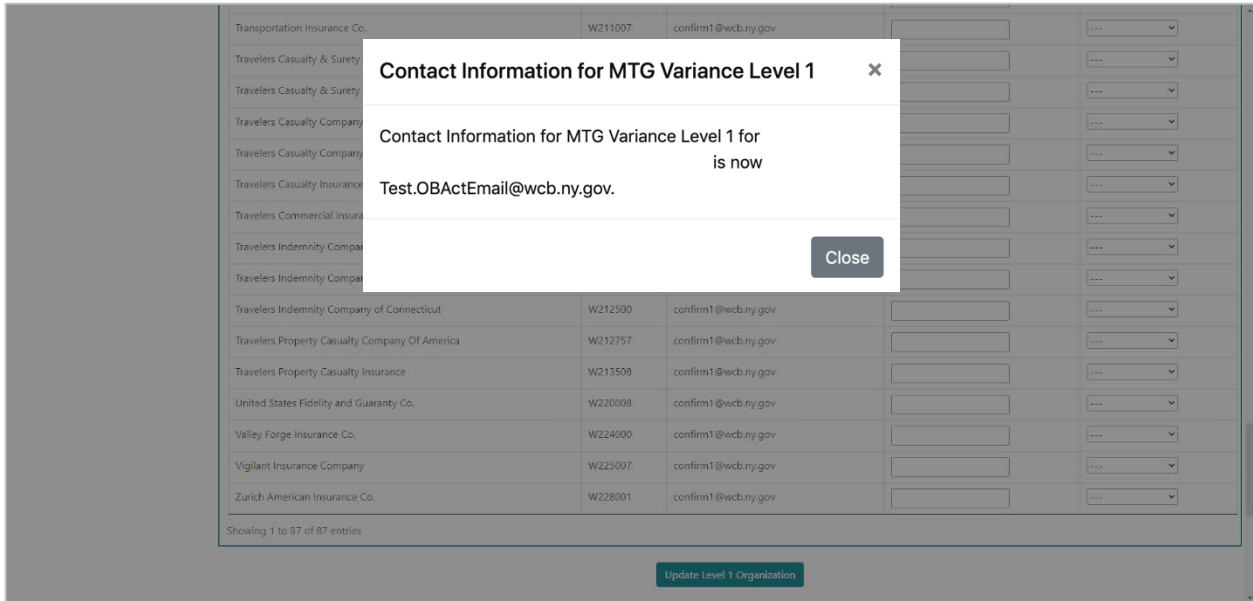
Managing user roles

1. Select a PAR type under **Users**.

2. The first box shows users who are assigned to the role of the selected PAR type. These users can be assigned PAR reviews in OnBoard: Limited Release. To remove a designated user, select **Remove** in the user's row.

3. Modify designated user information by selecting **Modify** in that user's row.

4. The second box features registered users in the system who have not been designated to the role of the selected PAR type. Select **Add** to designate a user into a selected PAR type role.

5. After removing or modifying a user from box one or adding a user from box two, a pop up will appear confirming the change. After selecting **Close** on this pop up, the change will be made instantly.

6. If you do not see the intended user assigned in the tables, you can request for a new user to be added. Select **Add New User** to create a new user role for selected PAR type.

7. Enter the following user information then select **Continue** – first and last name, address, phone number and email address.

8. A pop up will appear, confirming the new user has been submitted for processing. This may take up to three to five days for the registration to be reviewed and accepted by the Board. That user will receive their Medical Portal NY.gov ID and temporary password to the email the administrator included for the user on the registration. Once the user is registered, they can be designated for PAR reviews, perform Workload Administrator duties, or administer users depending on the role the user was added as.

We encourage you to share this guide with other users in your organization or the organizations you work with. Please contact the Board if you need assistance.

VI. Need help?

Medical Portal access for payers: wcb.ny.gov/medicalportal
General registration questions: Customer Service (877) 632-4996
Technical assistance: WCBCustomerSupport@wcb.ny.gov
OnBoard Webpage: wcb.ny.gov/onboard
Email OnBoard: OnBoard@wcb.ny.gov