



Medical Benefit Tracker

First/Second Contact's Users Manual

A guide on how to activate
and maintain the accounts
of your office staff using MBT.

Welcome!

ODS is not able to know the responsibilities or the employment status of your employees using Medical Benefit Tracker, so as the Contact for your office or facility, we have given you the authority and ability to maintain your employee's access.

Because of HIPAA regulations, each employee that requests access to the Tracker needs to register on line. This allows them to create their own unique User ID and Password. This also allows the Contact for the office to maintain that account in the event that the User has disabled themselves or has left employment.

This Manual will help you in maintaining those accounts. If you have any questions, please feel free to email me at MBT@odshp.com or you may call me at the following numbers:

In Portland Area 503-265-5616
Toll Free 877-277-7270

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New User Registration.

Each employee that wants to use MBT will need to register. You can access this from the main MBT page at:

http://www.odshealthplans.com/medical/medical_mbt.shtml

The screenshot shows the ODS website for Medical Providers. At the top, there is a navigation bar with links for 'Provider Search', 'Contact Us', 'Help', and 'About ODS'. Below this is a search bar labeled 'Search ODS'. The main content area is divided into several sections:

- MEDICAL PROVIDERS**: A list of links including 'Medical Benefit Tracker', 'Plans and Networks', 'Pharmacy', 'Referrals', 'Samples and Forms', 'Billing Tips', 'Frequently Asked Questions', and 'Return To ODS Home Page'.
- Medical Benefit Tracker**: A section describing MBT as a free online service offering:
 - Eligibility
 - Network Info
 - Copay & Deductible
 - PCP Info
 - Claims Status
 - Referral Inquiry
 - Online Referral Entry
- Sign Up Today - Two Easy Steps!**:
 - Step 1:** Complete an [Electronic Services Agreement \(PDF File\)](#) for your organization and assign a contact person. This agreement is part of HIPAA privacy requirements and needs the signature of someone representing the entire organization (i.e. an owner, officer, administrator or patient accounts director).
 - Step 2:** [Register online](#) to get your login. For privacy reasons, your browser must support 128-bit encryption to use MBT. [Check your browser encryption.](#) If you need to upgrade your browser, [contact us](#) to request a free upgrade CD.
- Questions?** [View the demo](#) or contact the [MBT Administrator](#).

Click on the Link "[Register On Line](#)". If, when they click on the link, the page tells them "Page Cannot Be Displayed" then it means that their system is not set up with 128 bit encryption. Please call me to help correct that. It only takes a moment to upgrade your browser without affecting any systems on your computer.

If you would like to register your own staff and assign them your own User ID's and Passwords, you can do this from your Account Maintenance screen. There is a link to the Registration Page that will allow you to do this.

Once either you or your employee has completed the registration, both parties will receive a confirmation email (if parties have email addresses) regarding the pending account. As Contact, it will be up to you to complete the registration process by confirming the employee, assigning them their job

related screens, and activating the User. All of this is done in Real Time so you don't have to wait for the MBT Administrator to approve the account.

The screenshot shows the 'Medical Benefit Tracker Registration Form' on the ODS website. The form includes the following fields and callouts:

- 1**: First Name input field.
- 2**: Last Name input field.
- 3**: E-mail address input field.
- 4**: Office's Tax ID# (TIN) input field, with a note '(no dash)' below it.
- 5**: User ID requested input field, with a note '(4 characters min; 16 characters max)' below it.
- 6**: Password requested input field, with a note '(12 characters max, [Password Rules](#))' below it.
- 7**: Mother's maiden name input field, with a note '(used for identification if password is forgotten)' below it.

At the bottom of the form, there is a checkbox labeled **6** with the text: 'I agree to abide by the [Terms of Use](#) for the ODS Health Plans website.' Below this is a paragraph: 'Please allow up to 3 business days for user account authorization. An [Electronic Services Agreement \(PDF\)](#) must be on file for your office before access can be authorized.' At the very bottom are 'Submit' and 'Reset' buttons.

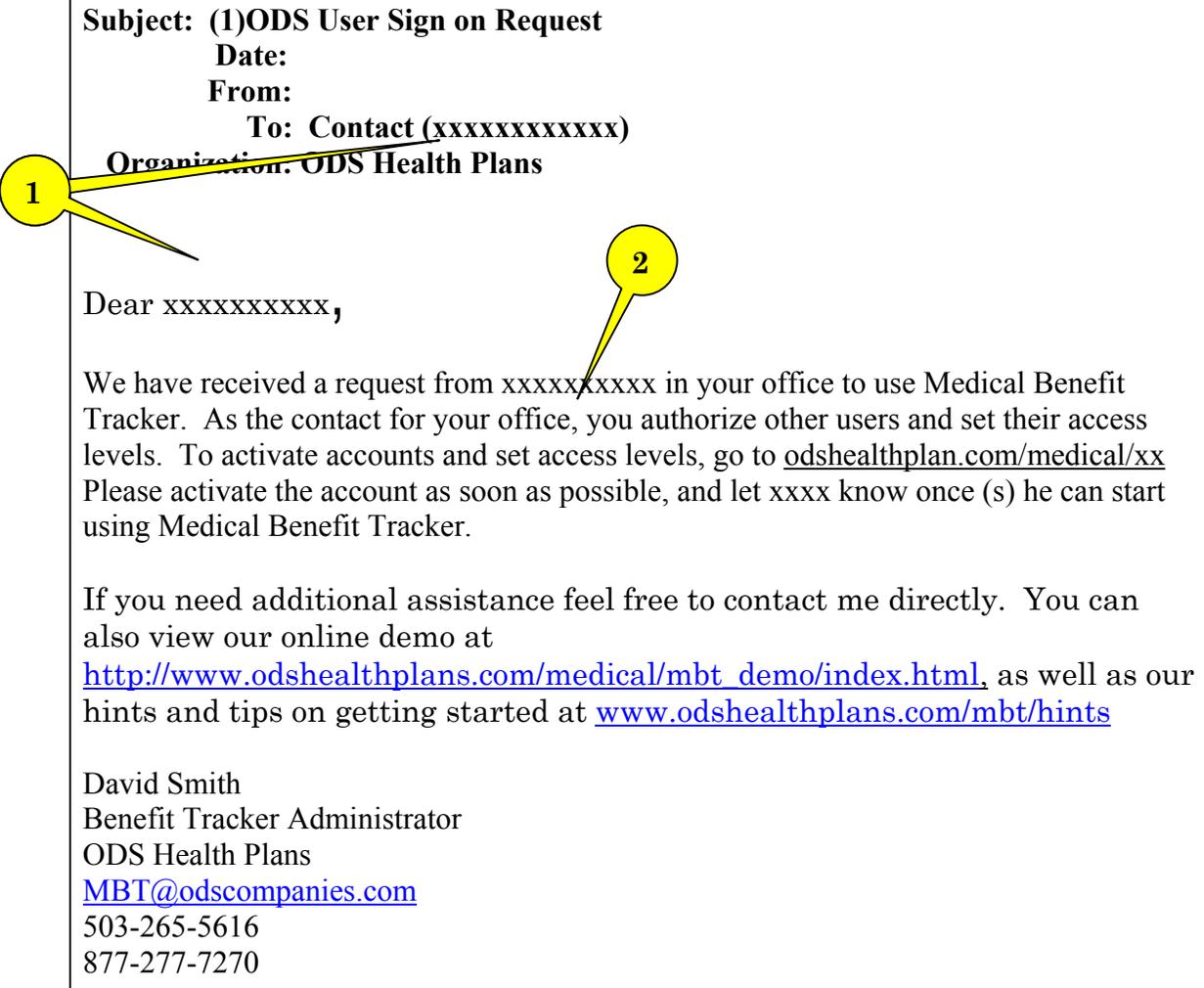
Fill out the appropriate information starting with the employee's First Name and Last Name.

1. If available, fill out the Email address. If no email address, enter "none".
2. Tax ID number. Please, no dashes. If a dash is entered, then the First Contact will not receive notification that the registration process is complete.
3. The USER ID REQUESTED will be one the employee chooses. Please be aware that this part is case sensitive.
4. The employee also makes the PASSWORD. It is alphanumeric and must contain combination of letters and numbers. This is also case sensitive.
5. The MOTHERS MAIDEN name is to confirm the user when requesting their password when they have forgotten it.
6. Terms of Use agreement. This must be checked or the registration process will cancel.

When complete, click on the Submit button. If everything went well, you will get a message that states that the “Registration was successful! If a field was incorrectly done, you will get a message to correct that field.

Email Notification

When the registration is successful, you will receive an email that looks like this:



Subject: (1)ODS User Sign on Request
Date:
From:
To: Contact (xxxxxxxxxxxx)
Organization: ODS Health Plans

Dear xxxxxxxxxxxx,

We have received a request from xxxxxxxxxx in your office to use Medical Benefit Tracker. As the contact for your office, you authorize other users and set their access levels. To activate accounts and set access levels, go to odshealthplan.com/medical/xx Please activate the account as soon as possible, and let xxxx know once (s) he can start using Medical Benefit Tracker.

If you need additional assistance feel free to contact me directly. You can also view our online demo at http://www.odshealthplans.com/medical/mbt_demo/index.html, as well as our hints and tips on getting started at www.odshealthplans.com/mbt/hints

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This will let you know that someone has registered to be an MBT user with your Tax ID Number. On this page you will find:

1. Your Name
2. The Requestor’s name

When you receive this email, you may sign on to Medical Benefit Tracker with your User ID and Password. From there you will be able to access the Maintenance Screen for your office.

Accounts Maintenance Screen

Once you have received the email notification from those Users that have an email address or if you have created the account yourself, you will need to activate that User before they can access Medical Benefit Tracker. You can maintain your staff from an Accounts Maintenance screen and is only accessible only by you, the Contact.

To access this screen, you will want to sign on to the [Medical Benefit Tracker](#) using your User ID and Password.

Once you have signed in, you will find a link called “Accounts”. Click here to access your Maintenance screen.

The screenshot displays the Medical Benefit Tracker website interface. At the top left is the ODS logo. To its right is the "Benefit Tracker" logo, where "Benefit" is in blue and "Tracker" is in black. A yellow navigation bar contains the following links: [Patient Search](#), [Physician Search](#), [Contact Us](#), [Help](#), [Manual](#), [Change Password](#), [Log Out](#), and [Accounts](#). The "Accounts" link is circled in black. Below the navigation bar is a "Subscriber/Patient Search" form with fields for Patient Last Name, First Name, Birth Date (format mm/dd/yyyy), and Subscriber ID (format no dashes), along with a "Go" button. A red asterisk indicates that the Subscriber ID field is required. Below the form, a note states: "Items displayed in green are not a part of the HIPAA standard." At the bottom, a second yellow navigation bar contains the text "BENEFIT TRACKER:" followed by the same set of links as the top bar. The "Accounts" link is again circled in black. A yellow callout box with the word "Accounts" in bold black text points to both "Accounts" links. At the bottom left is the ODS logo, and at the bottom right are links for [Physicians Home](#), [Contact Us](#), [Privacy Statement](#), [Terms and Conditions](#), and [About Benefit Tracker](#), along with the text "We welcome your [comments](#) on how to improve our site."

This Maintenance Screen is where you will also find the link to register a User yourself with ID's and Passwords you have in mind.

Patient Search Physician Search Contact Us Help Manual Log Off	
<h3>Account Maintenance for TIN # 912345678</h3> <ul style="list-style-type: none"> • Use this page to enable new requests or make changes to existing users. • After you've made all your changes, click the "Submit All Changes" button at the bottom of the page. • Use this link to Register a new user. 	
<h4>New Requests for Medical Benefit Tracker Access</h4>	
Denise Hall deniseh@dentistoffice.com User ID: deniseh Creation Date: 06/05/2001	<div style="text-align: center; font-size: 24px; border: 1px solid black; border-radius: 50%; width: 30px; height: 30px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">1</div> <p> Select Optional Permissions*: <input type="checkbox"/> Claims <input type="checkbox"/> Referral Inquiry <input type="checkbox"/> Referral Entry </p> <p> Authorize Access: <input type="checkbox"/> Yes </p>
<h4>Enabled users</h4>	
Carol Jones caroljones@dentistoffice.com User ID: carolj Creation Date: 01/01/2001 Last Login: 06/10/2001	<div style="text-align: center; font-size: 24px; border: 1px solid black; border-radius: 50%; width: 30px; height: 30px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">2</div> <p> Change Optional Permissions*: <input checked="" type="checkbox"/> Claims <input checked="" type="checkbox"/> Referral Inquiry <input checked="" type="checkbox"/> Referral Entry </p> <p> Disable User: <input type="checkbox"/> Yes </p>
<h4>Disabled users within the past 30 days - Archive of disabled users</h4>	
Jeff Baker jeffb@dentistoffice.com User ID: jeffb Creation Date: 01/15/2001 Last Login: 2/11/2001 Automatic disable: 60 days no use	<div style="text-align: center; font-size: 24px; border: 1px solid black; border-radius: 50%; width: 30px; height: 30px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">3</div> <p> Change Optional Permissions*: <input checked="" type="checkbox"/> Claims <input checked="" type="checkbox"/> Referral Inquiry <input checked="" type="checkbox"/> Referral Entry </p> <p> Enable User: <input type="checkbox"/> Yes </p>

The Maintenance screen is divided up into three categories.

1. **New Requests for Medical Benefit Tracker Access** – After you or the employee has completed the registration, their account information will be in this field. If you have not checked your Maintenance Screen in some time, you may have more than one account awaiting your approval.
2. **Enabled Users** – These users are currently authorized to use the system.

3. **Disabled Users within the past 30 days** – These users have not used the system for 90 consecutive days. There is a built in security feature that disables these users. The list that is default will show your current disabled users within the 30 days. The “Archive of Disabled Users” link will show all disabled users within your office.

Activating New Users

To activate the new requestor, simply check the box “Authorize Access”. Automatically, this user will have access to Eligibility, Benefits, and PCP History. You have the option to give this user to view claims and referrals as well. To do this, click on the boxes “Claims” and “Referrals”.

If you are a PCP’s office and your user is a referral coordinator, you can have the employee perform online referrals by clicking on the “Referral Entry” box.

New Requests for Medical Benefit Tracker Access	
Denise Hall deniseh@dentistoffice.com User ID: deniseh Creation Date: 06/05/2001	Select Optional Permissions*: <input type="checkbox"/> Claims <input type="checkbox"/> Referral Inquiry <input type="checkbox"/> Referral Entry Authorize Access: <input type="checkbox"/> Yes

To complete the approval, scroll down to the bottom of this page, and click on this button:

Submit All Changes

Once you click this button, your changes will take place immediately and your employee can use MBT right away.

Deactivating Users

In the circumstance that one of your employees no longer is employed with your office, you can terminate their access immediately so that they cannot access this system from another outlet. MBT is a web based program and could be accessed from a home computer so the best way to keep unwanted people from using the system is to terminate their access.

To do this, bring up your Accounts Maintenance screen and find the employee that you wish to terminate access. This person will be in your “Enabled Users” category. If you have a lot of employees, a simple way to search is to perform a Control-F function (Find) and enter the employee’s name.

Enabled users	
Carol Jones caroljones@dentistoffice.com User ID: carolj Creation Date: 01/01/2001 Last Login: 06/10/2001	Change Optional <input checked="" type="checkbox"/> Claims <input checked="" type="checkbox"/> Referral Inquiry Permissions*: <input checked="" type="checkbox"/> Referral Entry Disable User: <input checked="" type="checkbox"/> Yes

To terminate this employee’s access, simply click on the box “Disable User” then scroll to the bottom of your screen and click the “Submit All Changes” Button:



The change will be immediate and your employee will no longer be able to access the system.

Reactivating disabled users

Disabled users fall into three categories.

1. Disabled due to non use,
2. Disabled at First/Second Contacts request (usually by termination),
3. Disabled by the ODS MBT Administrator.

Disabled due to non-use.

The Medical Benefit Tracker has a built in security feature that will disable all users that have not accessed the system for 90 consecutive days. *All users will get a 5-day warning email that the account will be disabled.* The exception to this is the First and Second Contacts that ODS keeps active at all times regardless of access. This is an example of this kind of disabled user.

Disabled users within the past 30 days - Archive of disabled users	
Jeff Baker jeffb@dentistoffice.com User ID: jeffb Creation Date: 01/15/2001 Last Login: 2/11/2001 Automatic disable: 60 days no use	Change Optional <input checked="" type="checkbox"/> Claims <input checked="" type="checkbox"/> Referral Inquiry Permissions*: <input checked="" type="checkbox"/> Referral Entry Enable User: <input type="checkbox"/> Yes

You can see why this person was disabled. To reactivate this user, click on the “Enable User” box, scroll to the bottom of your screen and click on the “Submit All Changes” Button.



The change will be immediate and your employee can now use the Benefit Tracker.

Disabled at First/Second Contact Request

This function will allow you to reactivate a user in case they were deactivated in error. Another reason would be if someone had left employment for any reason and then returned, for example maternity, school, etc. Here is an example of a manually disabled user:

Amy Matthews amym@dentistoffice.com User ID: amym Creation Date: 02/15/2001 Last Login: 03/20/2001 Manual disable	Change Optional <input type="checkbox"/> Claims <input checked="" type="checkbox"/> Referral Inquiry Permissions*: <input checked="" type="checkbox"/> Referral Entry Enable User: <input type="checkbox"/> Yes
--	--

To reactivate this employee, check the box “Enable User”, verify what permissions they will have the Tracker, scroll to the bottom of your screen and click the “Submit All Changes” button.

Submit All Changes

The change will be immediate and your employee can start using Medical Benefit Tracker right away.

Disabled by ODS MBT Administrator

This will be the only employee that *you will not be able to reactivate*. There is usually a reason why the Administrator would have to terminate their access. While this does not happen very often at all, if your employee has been deactivated by ODS, you will need to [contact the Administrator](#) to have them reactivated. Here is an example of a ODS disabled user:

Connie Merrill conniem@dentistoffice.com User ID: conniem Creation Date: 03/15/2001 Last Login: 04/17/2001 ODS Disable	Contact ODS if changes are needed to this account.
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Disabled Users due to incorrect password.

Another security feature on Medical Benefit Tracker is that it will disable any user that has entered their password more than three times consecutively incorrectly. This is to, obviously, keep out unauthorized access into patient files. The individual user will be emailed a warning that their account has been disabled and will also give a link to help them remember their password. **The [MBT Administrator](#) can only reactivate these users that have been deactivated due to the wrong password being supplied.** If you or your employee needs any help with their password, please contact ODS.

Forgetting your User ID

In this world of User names and passwords, it is easy to sometimes forget your User ID for a particular system you need to access. If you or your employee has forgotten their User ID, there is an easy link to be reminded of what that User ID is. At the Login Screen, you will find this link:

User ID:	<input type="text"/>
Password:	<input type="password"/>

Forgot your [User ID](#) or [password](#)?



Clicking on this link will take you to the following section:

Name:	<input type="text"/>
Office Tax ID# (TIN):	<input type="text"/>

The employee can enter this information and it will be sent to the MBT Administrator via email. If the employee has an email address on file, the User ID will be sent to them directly. If not, the User ID will be sent to the Contact.

As the First/Second Contact, you are able to view their User ID from your Accounts Menu. Simply access the Accounts link to bring up your employee files. Look for the User ID on their file and if you like, you may relay that information to your employee.

Enabled users	
Carol Jones caroljones@dentistoffice.com User ID: carolj Creation Date: 01/01/2001 Last Login: 06/10/2001	Change Optional <input checked="" type="checkbox"/> Claims <input checked="" type="checkbox"/> Referral Inquiry Permissions* : <input checked="" type="checkbox"/> Referral Entry Disable User: <input type="checkbox"/> Yes



Forgotten your Password

In this world of User names and passwords, it is easy to sometimes forget your Password for a particular system you need to access. If you or your

employee has forgotten their Password, there is an easy link to be reminded of what that Password is. At the Login Screen, you will find this link:

User ID:	<input type="text"/>
Password:	<input type="password"/>

Forgot your [User ID](#) or [password](#)?

Clicking on this link will take you to this function.

User ID:	<input type="text"/>
Mother's Maiden Name:	<input type="text"/>
Office Tax ID# (TIN): (no dash)	<input type="text"/>

You or your employee will need to fill in the fields. Your password will be displayed on the next page provided all information is entered correctly.

Security

Security and confidentiality of member information is very important to ODS. ODS has used advanced technology to provide a secure system for making information available to your office. For security reasons we only allow access to information that is necessary and relevant to your office. Just as we take great care to safeguard our member information in its delivery to you, it is equally important that your office take steps to safeguard that information.

Your responsibilities include the following:

- Using your own User ID and password
- Using and maintaining your own password protection and confidentiality.
- Ensuring that the workstation monitor is not in view of non-authorized personnel.
- Ensuring that you have logged off of the application when it is not in use
- Three failed login attempts or ninety days of non-use, will disable your account. Please contact the MBT Administrator to reactivate or consult your [Accounts Maintenance Screen](#).

All About Passwords

Passwords are an integral part of your responsibility in maintaining security and privacy.

The following guidelines are to be used in selecting a password:

- Passwords must be at least six characters in length.
- Passwords must include both numbers and letters.
- No special characters are allowed (i.e. %, @, +).
- May include upper and lower case letters
- Should not be an ascending or descending series of numbers or letters (i.e. 654321, abcdef)

It is important that the passwords not be obvious to anyone else or easily guessed. For instance, the passwords should not be:

- Your first name or the name of a family member.
- Your birth date.
- Repeating letters or numbers (i.e. 111aaa, abc123)

Requirements For Changing a Password

Passwords must be changed:

For security purposes, passwords expire every 90 days. Please assign a new password.									
Fill in form on the right, and click the "Change" button to change your password. Remember, valid passwords:									
<ul style="list-style-type: none">• Are between 6 and 12 characters.• Have a mix of numbers and letters.• Contain no special characters.• Are case sensitive.• Are not previous passwords.	<table border="1"><tr><td>User Id</td><td><input type="text"/></td></tr><tr><td>Current Password</td><td><input type="password"/></td></tr><tr><td>New Password</td><td><input type="password"/></td></tr><tr><td>New Password (please enter again)</td><td><input type="password"/></td></tr></table>	User Id	<input type="text"/>	Current Password	<input type="password"/>	New Password	<input type="password"/>	New Password (please enter again)	<input type="password"/>
User Id	<input type="text"/>								
Current Password	<input type="password"/>								
New Password	<input type="password"/>								
New Password (please enter again)	<input type="password"/>								
	<input type="button" value="Change"/>								

- At least every 90 days
 - A reminder notification will automatically appear on screen 14 days before the 90-day period is complete. Benefit Tracker will still be accessible during this period. If the password is not changed by the end of 90 days, Benefit Tracker will not be available for use until the password is successfully changed.

- If a staff member with known access to the password/system leaves employment with the office. This employee should be disabled via the [Accounts Maintenance Screen](#).

Logging Off Of Benefit Tracker When Not In Use

Since personal information is to be kept as secure as possible, we ask that you log off of Benefit Tracker when it is not in use. To log off, simply hit the log off link located at the bottom of the screen.



If Benefit Tracker has not been queried for a period of 30 minutes, the application will automatically turn itself off. You will need to login to the application to begin using it again.

Contact Information

Customer Service

Main
503-243-3968
1-877-337-0650
fax 503-948-5556

Medical Benefit Tracker Administrator

503-265-5616
1-877-277-7270
Email: MBT@odscompanies.com

Professional Relations

Representative
503-228-6554 Ext 1064
1-800-852-5195

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601 SW Second Avenue
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