Community Health Partnership Services

# TPA AFH

# Provider Portal User Guide

*Powered by SDS*

**PORTAL.SMARTDATASTREAM.US**

CHPS Support

CHPS_TPA_TA@chpw.org

(800) 709-9901

Community Health Partnership Services

# Table of Contents

# Getting Started/Creating Your Account

To create an account, click **here** and complete the form. Before you submit, you must choose how you want to receive your activation code:

- Phone (recommended)
- Fax (recommended)
- Mail (can take 4-7 business days)

Once you have submitted the form, you will receive a pop-up and an email detailing next steps and the timeframe to expect your activation code.

Please note that only new account registrations with NPI or API will be accepted. To register with your API, click on **Don't have an NPI? Click here to enter an alternate identifier** and enter your API in the Alternate ID field.


Provider Details

Name

Tax Identification Number (TIN)

National Provider Identifier (NPI)

Don't have an NPI? Click here to enter an alternate identifier

Alternate ID (ie: UMPI)

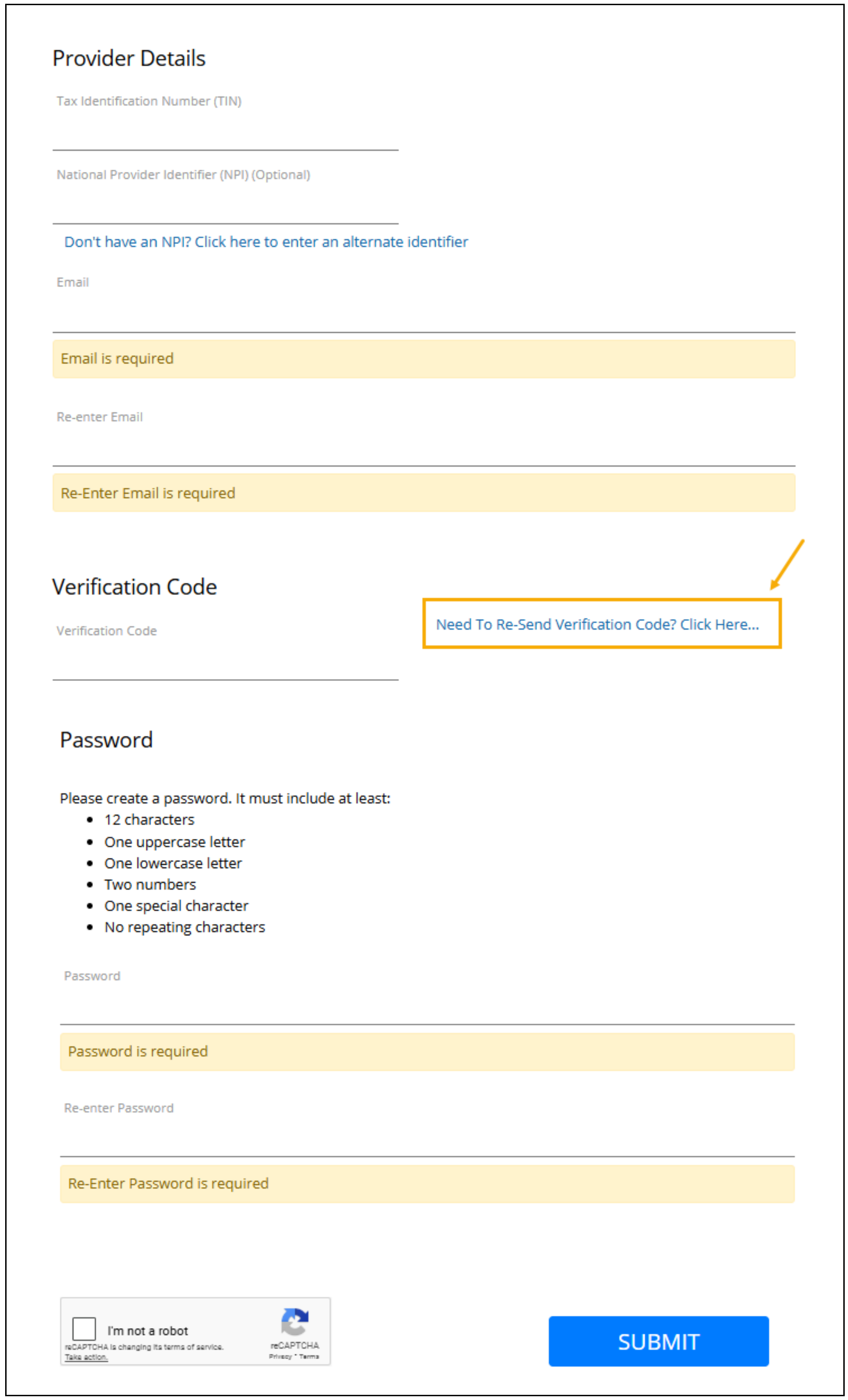
To finalize your account:

1. Go to the link in your email
2. Verify your account with the information you used to register
3. Enter your verification code (ALL UPPERCASE)

   To resend the verification code, click the link to the right

4. Create your password
5. Complete the Captcha
6. Click Submit

After submitting, you will see a pop-up with your username. Log in with your username and password, then you are good to go!


Provider Details

Tax Identification Number (TIN)

National Provider Identifier (NPI) (Optional)

Don't have an NPI? Click here to enter an alternate identifier

Email

Email is required

Re-enter Email

Re-Enter Email is required

Verification Code

Verification Code

Need To Re-Send Verification Code? Click Here...

Password

Please create a password. It must include at least:

- 12 characters
- One uppercase letter
- One lowercase letter
- Two numbers
- One special character
- No repeating characters

Password

Password is required

Re-enter Password

Re-Enter Password is required

I'm not a robot

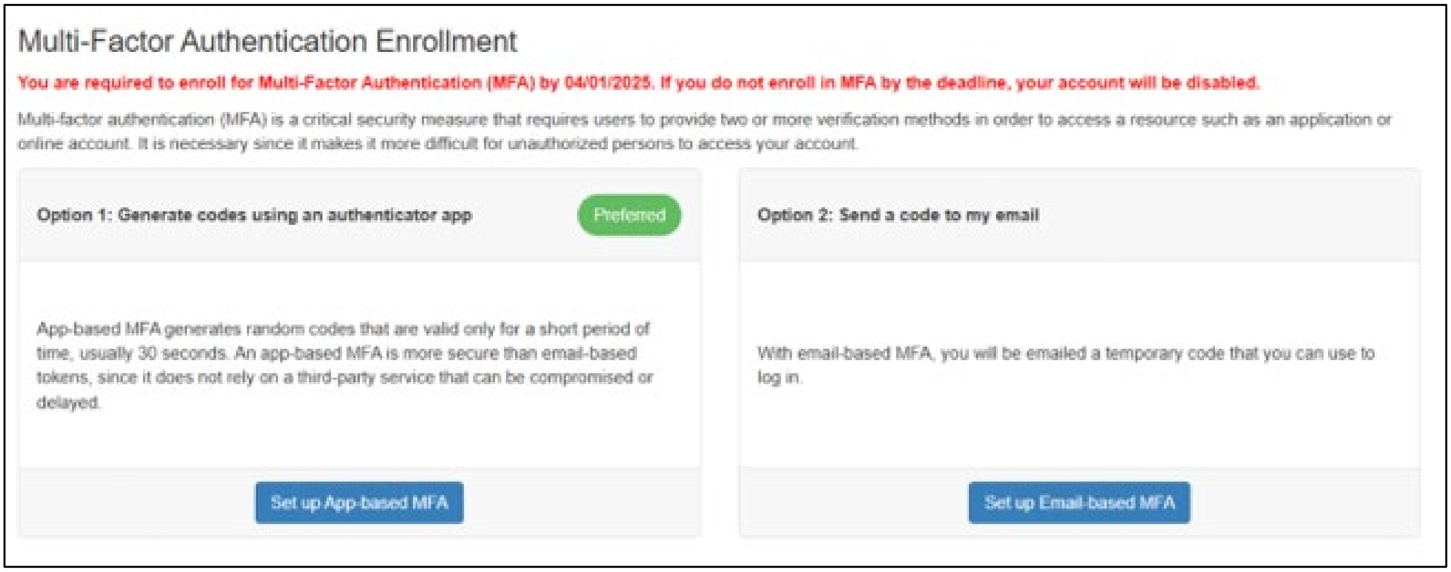
reCAPTCHA is changing its terms of service. Take action.

reCAPTCHA

Privacy - Terms

SUBMIT

Upon logging in for the first time, you will need to set up Multi-Factor Authentication (MFA). Pick either an app-based MFA or email-based, then follow the specified instructions for your MFA of choice.




Once your MFA token is set up, you will be prompted to start your Electronic Remittance Advice (ERA) enrollment. If you wish to proceed, click on Start Enrollment.


Fill in the required fields in the form below marked with *asterisks. If you are using an API, click on **Don't have an NPI? Click here**.
Select individual payer(s).
Click Submit.

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# Remit Enrollment

Use this form to enroll for electronic remits from payers available through Smart Data Stream. This enrollment is not retroactive and payments received before the selected effective date will not be available through Smart Data Stream.

## Profile

Profile Nickname

## Provider Information

* Name

Doing Business As (DBA)

* Address Line 1

Address Line 2

* City
* State
* ZIP

## Provider Identifiers Information

Please enter a TIN to submit.

* Tax Identification Number (TIN) ⓘ
* Verify TIN:

National Provider Identifier (NPI)

Verify NPI:

Auto-Populate Name/Address/Contact From NPPES

Don't have an NPI? Click here.

Trading Partner ID ⓘ

## Provider Contact Information

* Last Name
* First Name
* Contact Phone
*Contact Email

ERA Enrollment

- No - I would not like to receive ERAs
- Yes - I would like to receive ERAs for these payers.

## Payer Selection

Select individual payers

## Submission Information

Reason for SUBMISSION ⓘ

- New Enrollment
- Change Enrollment
- Cancel Enrollment

## Authorized Signature

* Signature ⓘ

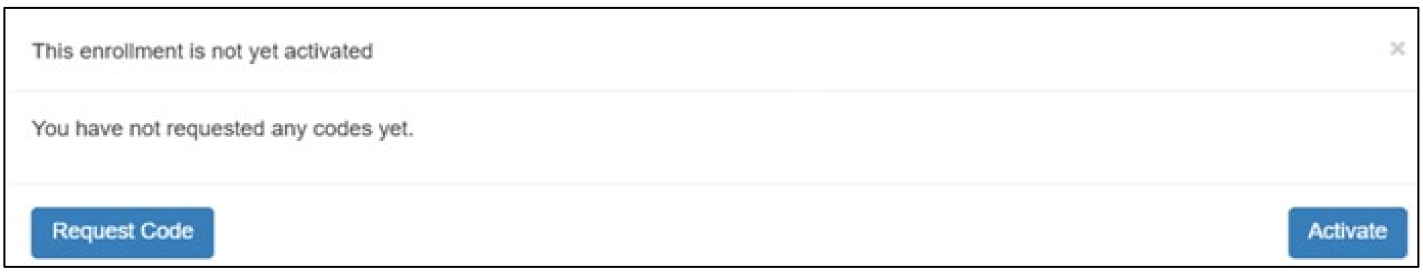
Submission Date

2025-10-15

* Requested ERA Effective Date ⓘ

Submit


Once you have submitted your remit enrollment, you will see this pop-up box appear.




Select **Request Code** to verify your tax ID.

Select your method of code delivery (phone call, fax, or USPS mail). Enter the activation code and click activate (UPPERCASE only). You will then be prompted to reenter your Tax ID and NPI/API in the enrollment section.


**NOTE:** If you do not reenter your tax ID, your enrollment status will still appear as **Not Started**.



## Account Management

### Administrators

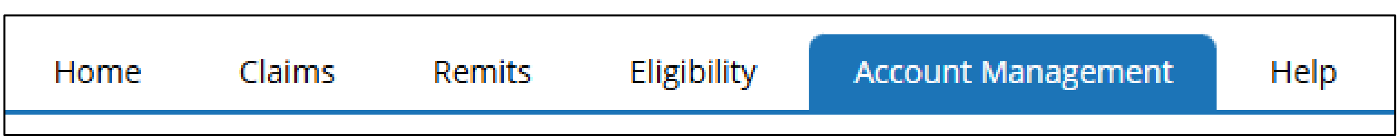
The person whose contact information was entered into the registration form is automatically designated as an account administrator. They are then responsible for adding additional users and granting others admin access, as necessary. It is recommended that you have more than one administrator.

### How to Add New/Additional Users

The admin creating new users is responsible for creating the user ID for new users and providing them with login information.

To add new users, do the following:

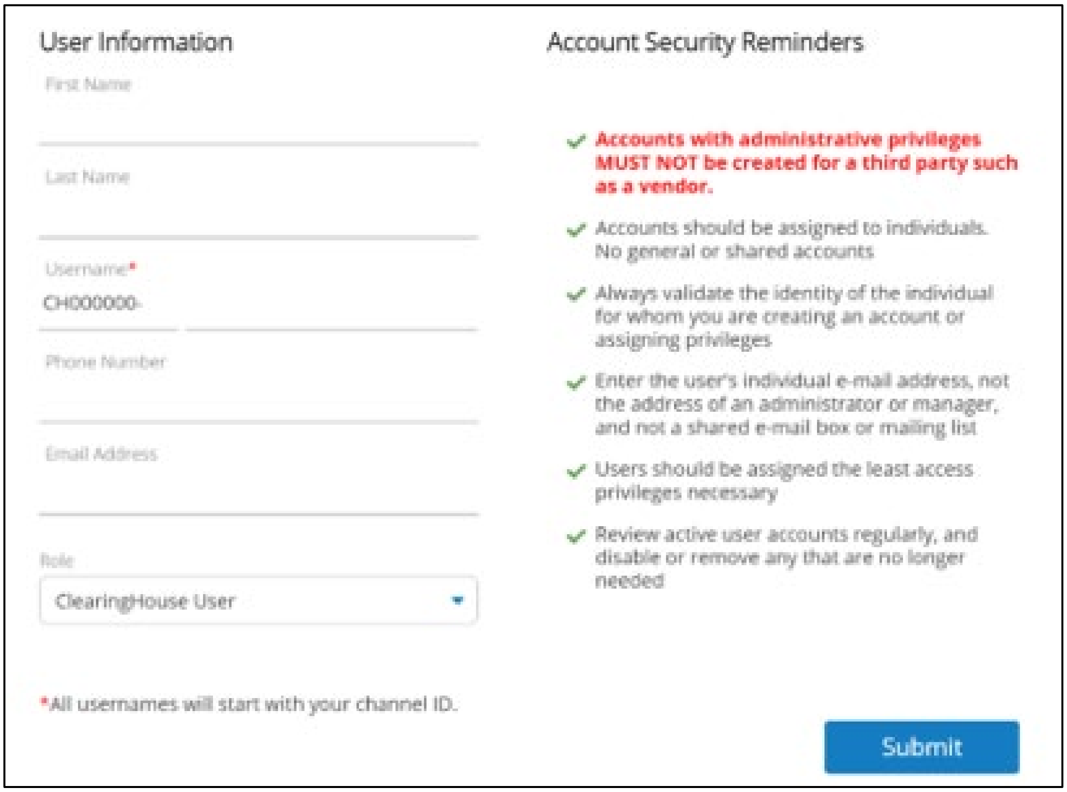
1. Click on the *Account Management* tab
2. Click *User*
3. Click the *+Add New User* button
4. Complete the required fields
5. Click *Submit*




Click User in the Account Management tab and click the 

button.

Complete all necessary fields including asterisked* fields. All usernames begin with a channel ID. It is necessary to add additional username information after the channel ID that will be specific for the new user being created. Example: CH000000-jdoe.




Click **Submit**.

Once the user is created, they will receive a system-generated email with a link to log in.

*The system does NOT send an email to them with their username once a user has been created.

### Editing Users

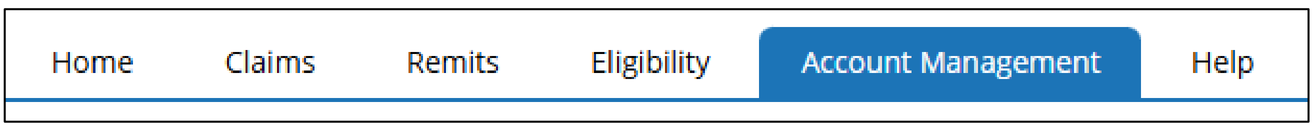
**Only admins can edit users**. They can view, edit, remove, and add restrictions for existing users. By clicking on **Add Restrictions**, new fields for entering required permission information will be added. Similarly, clicking on the **pencil button** allows for editing and removing existing permissions.

## How to Edit User Roles and Permissions

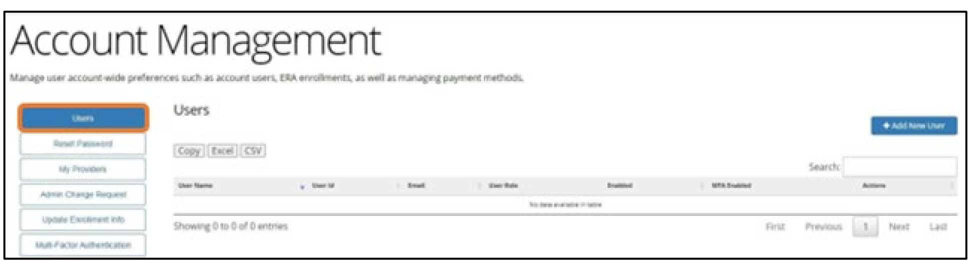
To edit user roles and permissions, do the following:

1. Click on the Account Management tab
2. Click User
3. Click the +Add New User button
4. Complete the required fields
5. Click Submit

Click on the *Account Management* tab.




Click *Users*, located on the left-hand side.




Click *Edit User* for the user that needs to be updated, located beneath Actions. Here, you can:

- Update users/account information
- Require password changes
- Disable users
- Unlock users from failed login

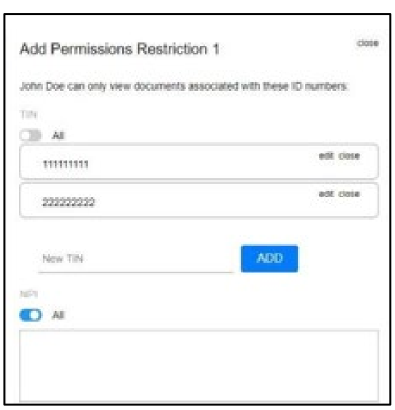

Edit the user with any desired changes.


Click *Save User.*

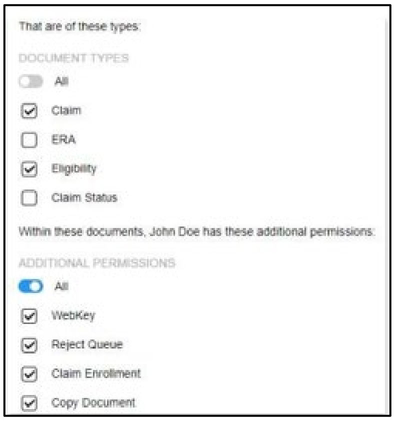
## User Restrictions

Within Edit User, you can set restrictions for any given user.

**Example 1**: John Doe is allowed to view documents associated with TINs 111111111 and 222222222 as well as any NPIs associated with those two TINs. They are not allowed to view a document that comes in with TIN 333333333.

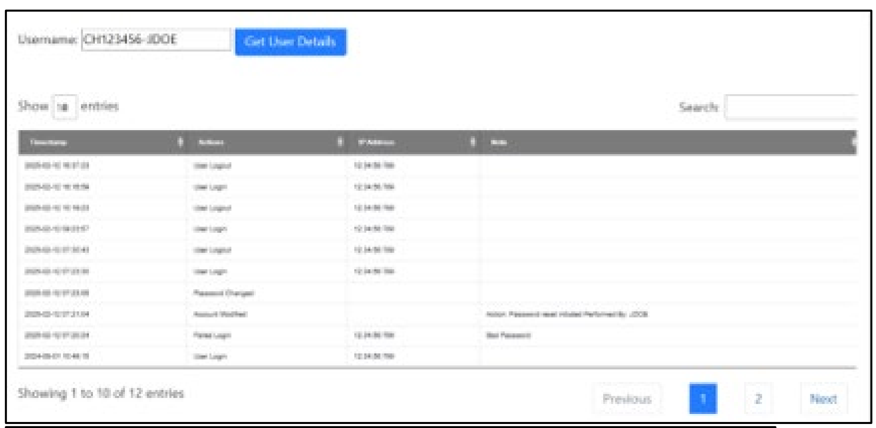


**Example 2**: John Doe is allowed to access the Claims and Eligibility pages. He cannot see any ERAs. He is allowed all claim submission tools.




## User Actions

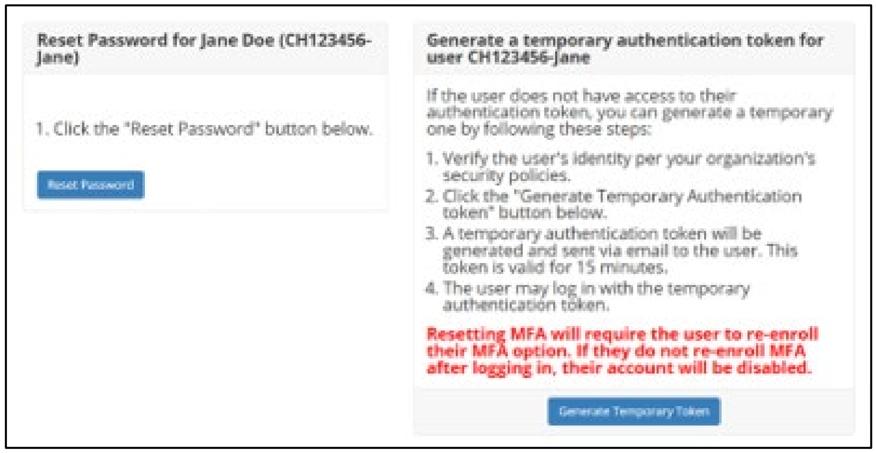

**User History:** View user account actions, when they were performed and from where, along with any additional notes.




**Remove User:** Click this button to remove a user. A dialogue option will pop

up prompting you to confirm or cancel.

**Reset Password/MFA:** Click to reset a user's password or MFA. A temporary token will be sent to the user's email on file to reset their MFA. The user will then sign in using their password and temporary token, then they will be prompted to re- enroll in MFA. This process is the same as MFA enrollment.




### Admin Change Requests

If the administrator is leaving the position for any reason, they should grant a new user/users access to the administrator functions.

- If the administrator leaves and a new administrator has not been designated, fill out the Admin Change Request form.
- The support team will contact your practice within 2-3 business days to confirm the information submitted and ensure the new administrator has the correct access.

## Claims Management

### Claims Submissions

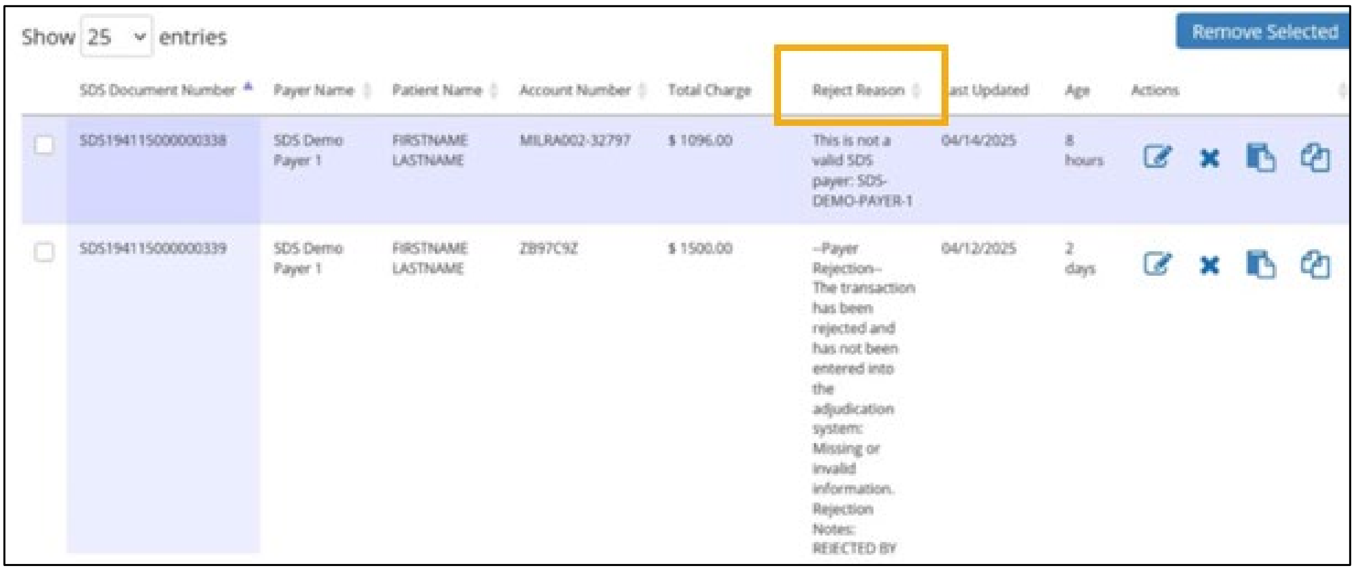
Please refer to the TPA AFH Provider Billing Guide for instructions on claim submission.

All claim files submitted through any submission method can be viewed under the Claim Files tab.

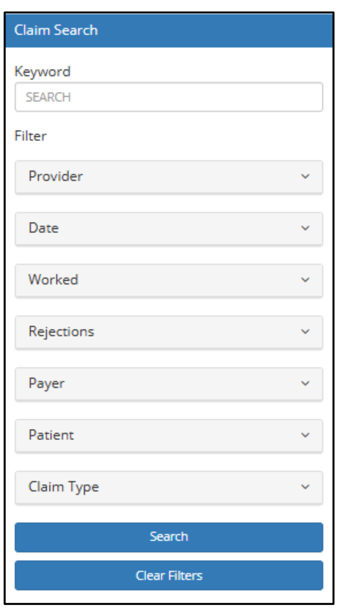
# Manage Rejects

You can view any claims that have been rejected in the Manage Rejects tab. The Manage Rejects button on the Claims page brings you to a queue of all unworked rejected claims

Select the filter dropdown option to group rejects together by rejection reason. Check the checkbox to display the claims rejected for that rejection reason.




You can also use the search options on the left-hand side.



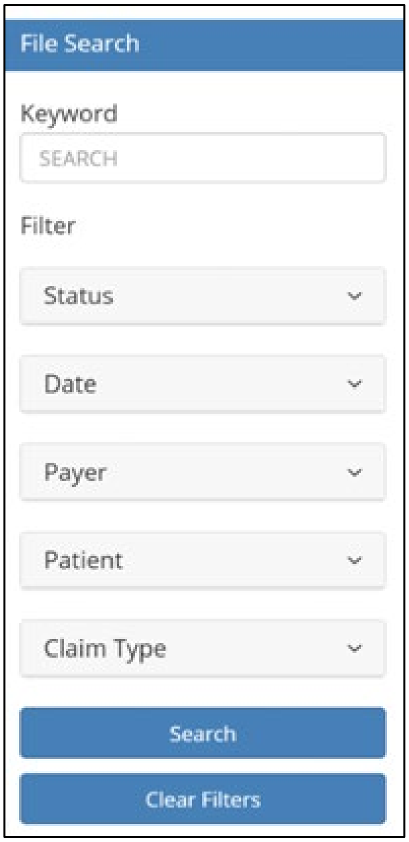
Under Actions, hover over each icon for a detailed description


**Edit** allows for corrections and resubmits (the claim will drop out of the reject queue)
**Remove** manually removes a claim from the queue
**Note** enters an internal note (for provider's internal use only)
**Copy** sends a claim to a different payer or creates a new claim with duplicate information (the claim will still exist in the reject queue until manually removed)

## Unsubmitted Claims

This page displays all claims that have been saved but not yet submitted. Use the Edit Claim button to finish working on the claim or use the Remove options to discard it.

## Claim Files




This page allows you to view files uploaded and entered using DDE. Narrow your search with the File Search window on the left.

Entries are broken down by:

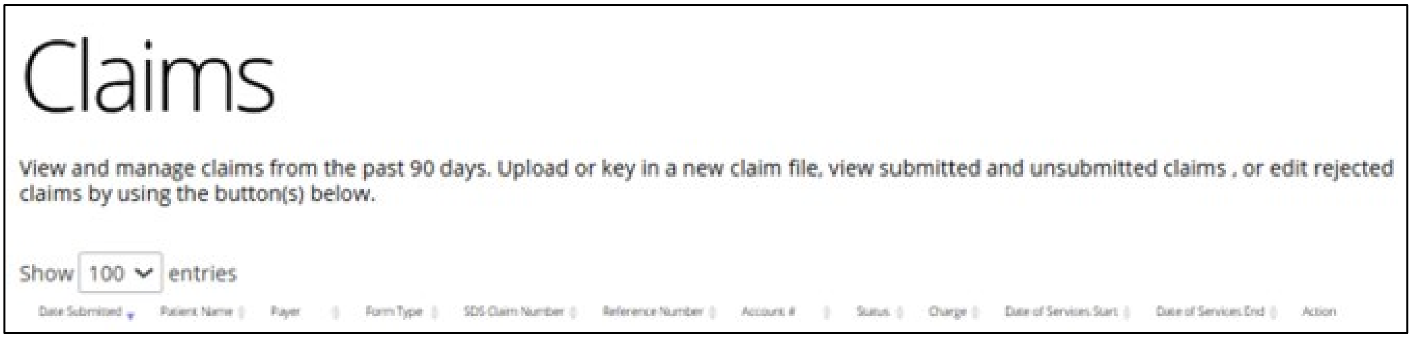
- Batch Name
- Received Date
- Status
- Total Charges
- Transaction Count
- Awaiting Submission
- Awaiting Acknowledgement
- Accepted
- Rejected
- Actions

Clicking the Actions hamburger menu will open the claim in a new tab displaying the claims input into the file. There, you can make any desired changes to that claim (Edit/Note/Copy/etc.).

## Claims Management

Below the Claims tabs are all claims from the past 90 days, listed individually. Additionally, the Advanced Search will locate a specific claim for up to 3 years.

**NOTE:** Depending on your browser, you may need to use the Legacy Search Interface to view claims past 90 days.

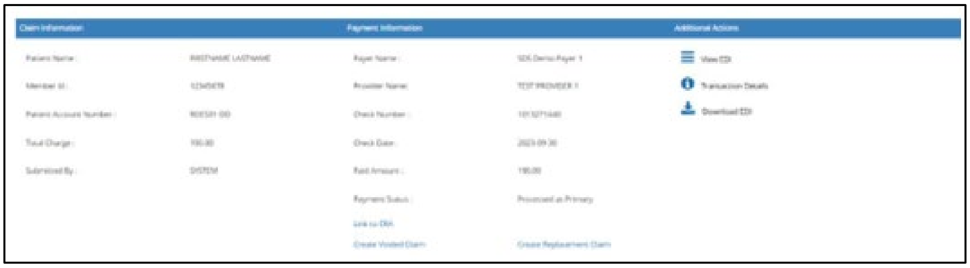



Claim details listed include:

- Date Submitted
- Patient Name
- Payer
- Form Type
- Claim Number
- Reference Number
- Account Number
- Status
- Charge
- Date of Services Start
- Date of Services End
- Action


The action menu functions include:

- **Show details** (see next paragraph for features)
- **Edit** opens a claim in “Submitted (Awaiting Routing)” status for final edits
- **Note** opens a pop-up to leave internal comments on the specific claim
- **Image** opens the claim in a CMS HCFA paper claim format
- **Copy** opens a pop-up to copy the claim or submit it as a secondary



Selecting show details menu allows you to:
**View EDI**: Displays the claim in EDI format (click View Image to view in paper claim format)
**View Transaction Details**: Displays additional document data and claim information
**Download EDI**: Automatically downloads an 837 file of the claim
**Link to ERA**: Links to PDF of applicable ERA
**Create Voided Claim**: Initiates a reversal/recoup by the payer
**Create Replacement Claim**: Replaces original adjudicated claim by the payer

## Remits

View and manage remits from the past 90 days. Use the Advanced Search option for any remit from the past 90 days, up to 3 years. Upload a new remit, view remit files, or manage your enrollments by using the button(s) below. Use the search box to search for specific remits or use filters to view remits for specific Payers and/or Patients. By clicking the Download Report link, you can download a payment report that is restricted to your filtered search results. If no filters are selected, the report will download the payment information from the last 30 days.

Actions

**Show Details** opens the remit information in a dropdown that offers additional details

- View EDI – summarizes the EDI transactions for a specific claim/bill
- Transaction Details – allows you to view a full set of transactions that originate from a document. In addition to displaying these transactions, you may also view a document image by pressing 'View Document'. If a destination accepts status requests, you may click 'Request Status' to request a status update.

**Note** adds an internal comment

**Image** opens the remit in a paper remit format. For adjustment and remark codes, click the links found above the document

**Re Export Document** reroutes to SFTP

**Download** downloads the remit as an 835 EDI file

**Grid** displays each individual claim from the remit

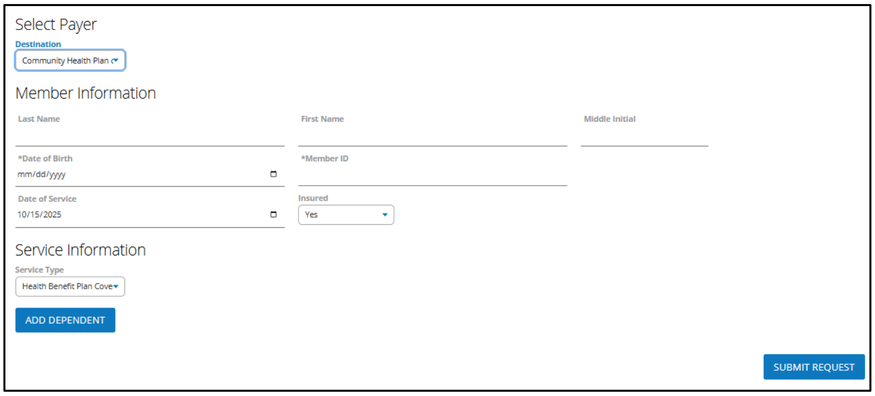
## Eligibility

### Selecting Payers

To check eligibility, navigate to the Eligibility tab and Click on *New Eligibility Inquiry*.

1. On the form, select the relevant payer from the Destination dropdown menu.
2. Fill out the member/patient information. Most payers require DOB, First and Last Name, and Member ID, but there are a few that only require DOB and member ID.
3. Click **Submit Request**.

**NOTE:** Eligibility may also be checked in the direct data entry screen.




# Help

Use the sidebar options to navigate the various support guides. If you have further questions, please contact CHPS at **CHPS_TPA_TA@chpw.org** or (800) 709-9901.