

CalOptima Provider Portal LOA User Guide

CalOptima's Local Office Administrator (LOA) User Guide can help you navigate the Provider Portal when completing daily tasks to serve our members. The portal is accessed from caloptima.org or providers.caloptima.org.

I. Local Office Administrator

Provider offices are required to assign a single point of contact to manage office and staff access to the CalOptima Provider Portal. This single point of contact is referred to as the LOA (Figure I.a.).

Note: The initial LOA will be set up by CalOptima. Thereafter, changes to LOAs, as well as the addition of office users, may be set up by the original LOA.

LOA are responsible for the collection and maintenance of office and staff details:

- Accept or decline new users
- Maintain list of active office users
- Edit user roles and security settings as responsibilities change
- Verify user access every 60 days
- Terminate user access

II. Provider Portal User Training

CalOptima requires all users to complete a short training program before they can access the Provider Portal. The LOA training includes a few extra slides that aren't part of the regular user training (Figure II.a.).

All users are required to complete the training module annually.

Figure I.a.

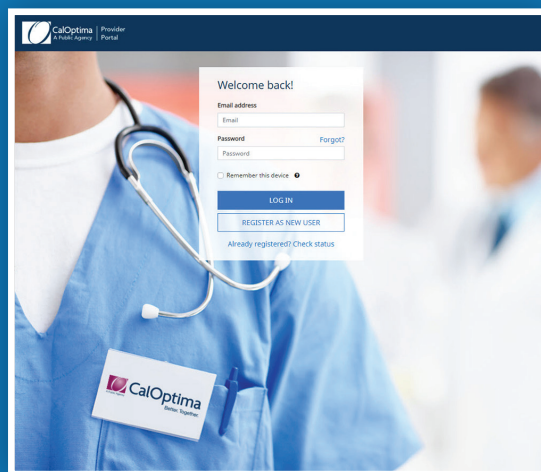
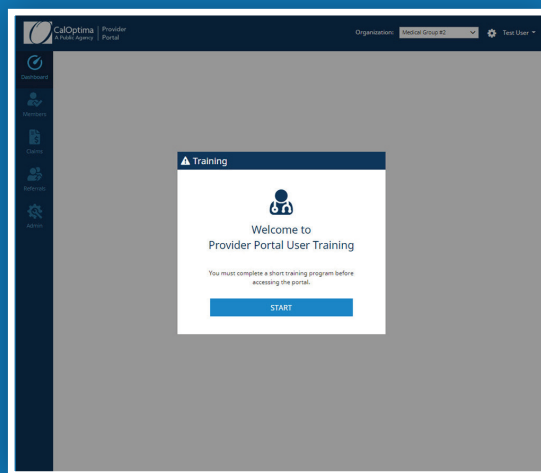


Figure II.a.



III. LOA Accepting or Declining New Users

When approving new users, the LOA will receive an email from CalOptima stating someone is requesting access. To approve access, the LOA must:

1. Log on to the Provider Portal and click on the **Settings** icon to view the **Task List**.
2. The **Task List** will display messages requiring LOA's response to request to add new users. Click on the message to access the request (Figure III.a.).
3. After selecting a message from the **Task List**, LOAs will be asked to either **Accept** or **Decline** the request to add a user (Figure III.b.).
4. If an LOA selects **Decline**, they will need to enter a reason for declining the request in the box provided.
5. If an LOA selects **Accept**, they will need to select the role and security settings for the user and click **Save**. **User roles** are (Figure III.c.):
 - Eligibility Viewer
 - Claims Viewer
 - PCP
 - Custom Setup
 - Local Office Administrator
6. After selecting the **User Role** and **Security Settings**, the LOA will need to select a Position for the user. Valid positions are (Figure III.d.):
 - Medical Assistant
 - Referral Coordinator
 - Nurse Practitioner
 - Nurse
 - Physician
 - Physician Assistant
 - Other

Figure III.a.

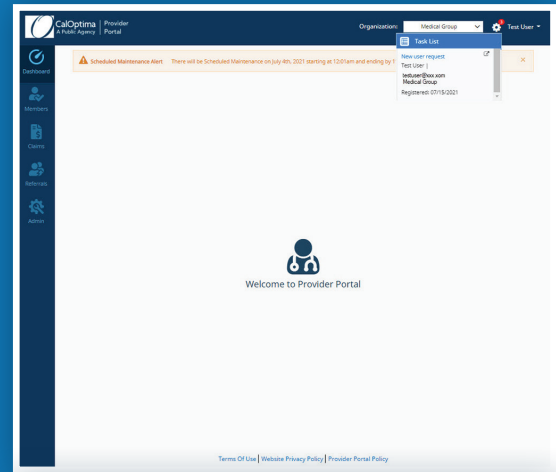


Figure III.b.

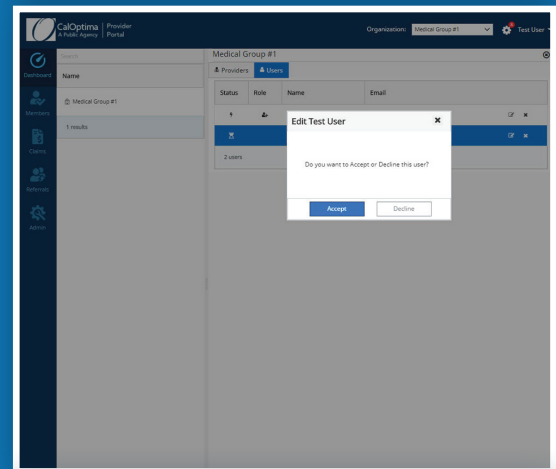


Figure III.c.

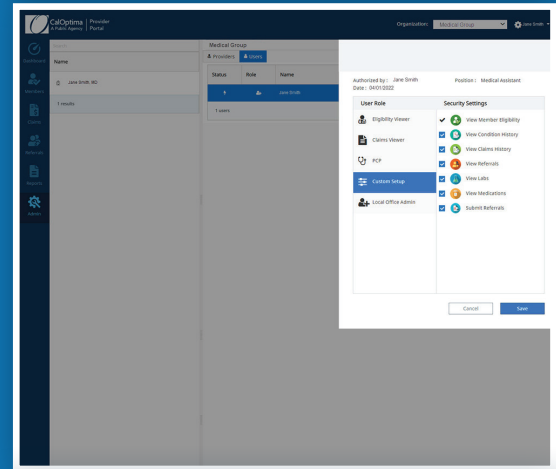
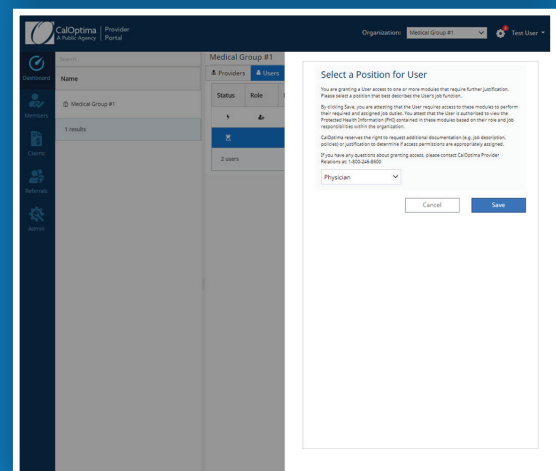


Figure III.d.



7. If **Other** is selected, the LOA must enter the **Position** (Figure III.e.).

After a LOA has successfully added the new user, an email will be sent to the accepted user.

IV. Verifying Users

The LOA is responsible for reviewing the users in their collection(s) and validating their level of access every 60 days. The **Verify Users** button will turn yellow when there are 15 days or less to verify the users.

If the 60 days have expired, the button will turn red and access will be suspended until your provider account is reinstated.

CalOptima may revoke access to all provider office users associated with a provider office and its workforce if non-compliance action deems necessary as it pertains to reporting, responding to, and investigating breaches, security incidents, violations or non-compliance.


1. To verify users, click on **Admin** on the left hand side.
2. Click on the **Verify Users** (Figure IV.a.) button to see a list of users for the collection.
3. To view the **User Role** and **Security Settings**, click on the **Edit** icon  (Figure IV.b.) in the **Role** column.
4. After confirming the **Users Role** and **Security Settings**, click the **Save** button (Figure IV.c.).

Figure III.e.

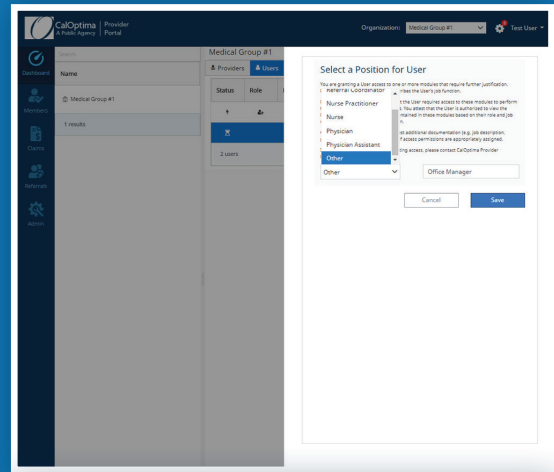


Figure IV.a.

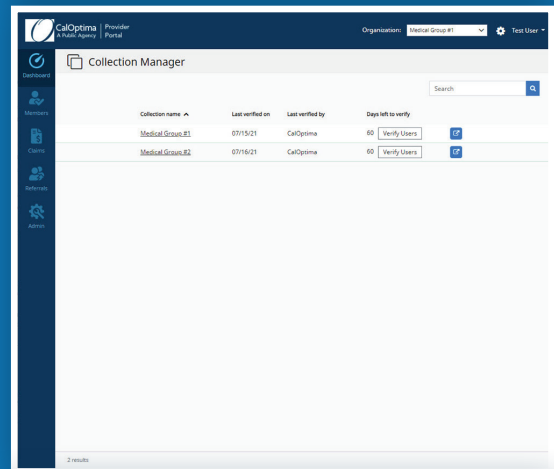


Figure IV.b.

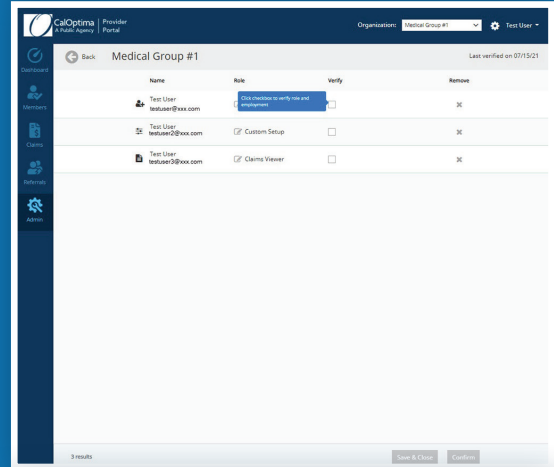
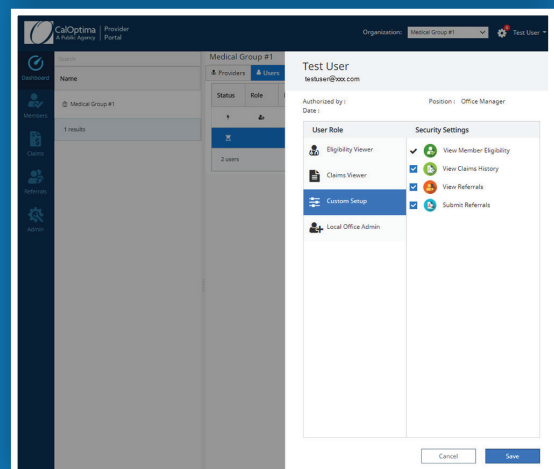


Figure IV.c.



- If all users have been verified, click the **Confirm** button. If all the users haven't been confirmed, click the **Save & Close** (Figure IV.d.) button.

The **Verify Users** button will turn white, when each user has been verified. The **Days Left To Verify** resets to 60 days.

V. Terminating User Access

The LOA is responsible for terminating access for staff no longer with the provider office or who no longer need access to the portal for the selected provider.

To remove a user from a collection:

- Click on **Admin** on the left-hand side. Click on the **Verify Users** (Figure V.a.) button to see a list of users for the collection.
- Click on the "X" (Figure V.b.) in the **Remove** column for the user to be removed from the collection.
- Enter the **Separation Date** and the **Reason** the user is being removed from the collection and click **Remove** (Figure V.c.).

Figure IV.d.

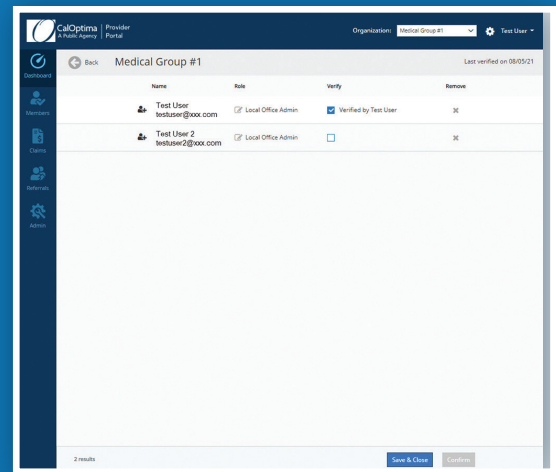


Figure V.a.

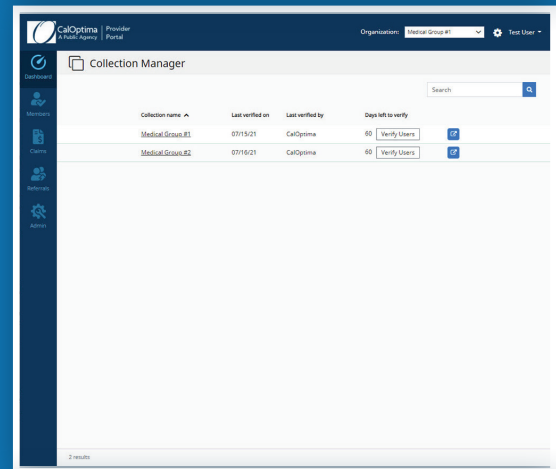


Figure V.b.

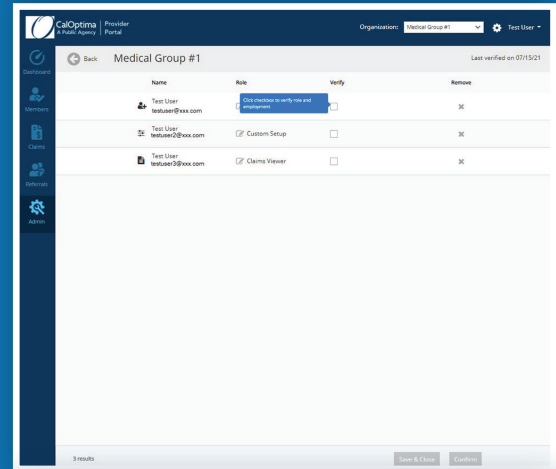
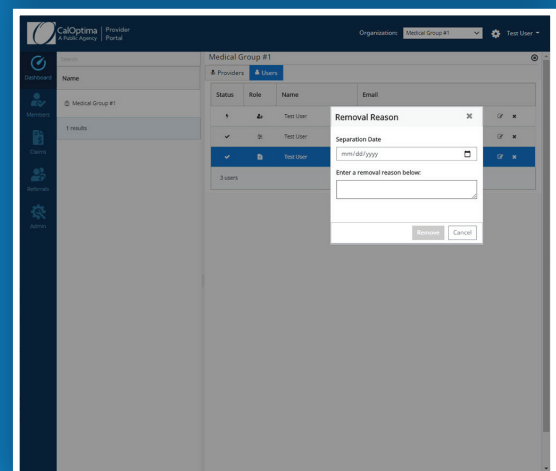



Figure V.c.



VI. Modifying User Access

A user's initial user role and security role can be changed at any time.

To update a **User's Role** and/or **Security Settings**:

1. Click on **Admin** on the left-hand side.
2. Click on the **Verify Users** (Figure VI.a.) button to see a list of users for the collection.
3. Click on the **Edit** icon  (Figure VI.b.) in the **Role** column for the user to be updated.

4. The user's current **User Role** and **Security Settings** will be displayed. Make any necessary changes and click **Next** (Figure VI.c.).

If the user is already a Local Office Administrator or Custom Role and you need to grant them access to an area of Provider Portal, simply check the box next to an optional setting. Then, click **Next**.

5. Select the **Position** for the user (Figure VI.d.). The valid options are:

- Medical Assistant
- Nurse
- Referral Coordinator
- Physician
- Nurse Practitioner
- Physician Assistant
- Other

Click **Save**.

Figure VI.a.

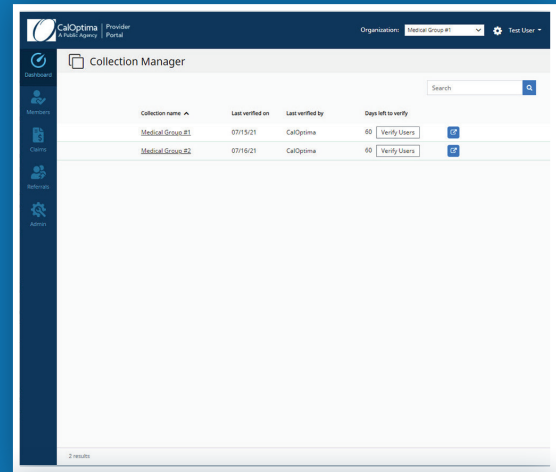


Figure VI.b.

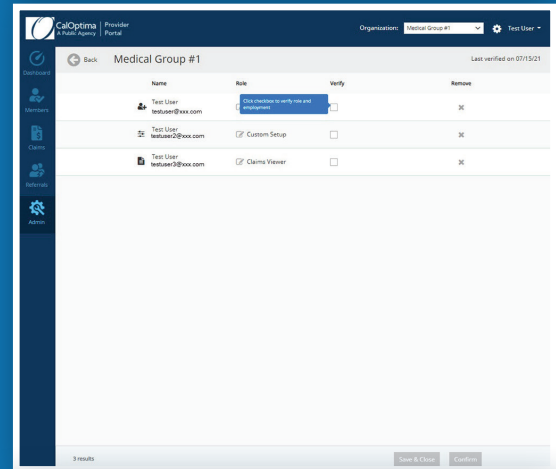


Figure VI.c.

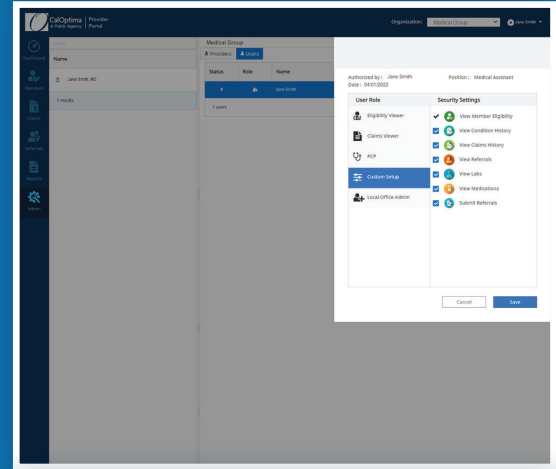
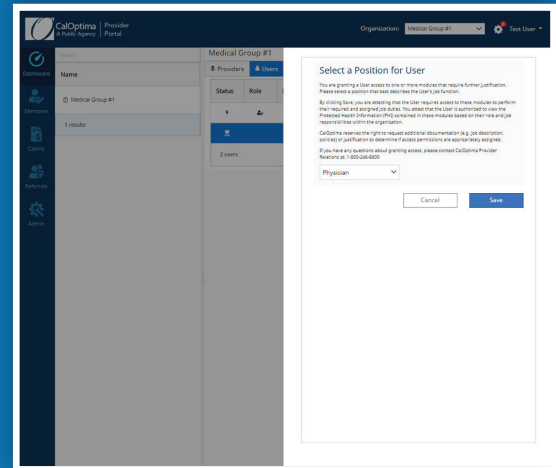
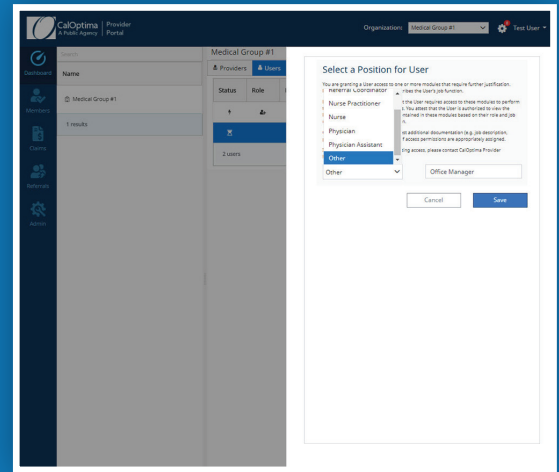


Figure VI.d.



- If **Other** (Figure VI.e.) is selected, the LOA must enter the **Position**.
- After entering the changes, the LOA will be prompted to enter the **Reason** for the change.
Click **Save**.

Figure VI.e.



Contact Us

For general questions about the portal or to change the LOA, please contact CalOptima Provider Relations:

- 714-246-8600 Option #2
- 888-587-8088 Option #2

To report suspect or potential security incidents or privacy breaches, please contact:

- CalOptima's Privacy Officer at privacy@caloptima.org or
- CalOptima Compliance and Ethics Hotline at 877-837-4417