

# Integra Partners Credentialing Portal

## DORI Training Manual



# DORI

Integra Partners Credentialing Portal



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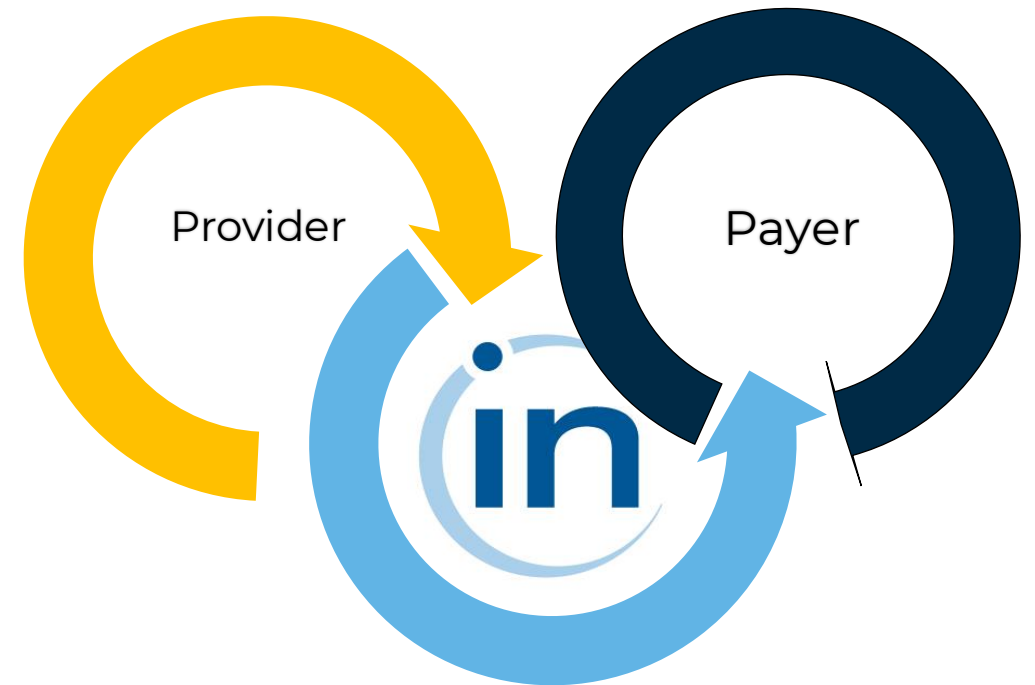
# Summary

## What is DORI?

DORI is Integra Partners Credentialing Portal, designed to enhance the initial and re-credentialing process, manage the ongoing monitoring of credentialing documentation, and maintain up to date provider details.

### How you'll be using DORI

1. Complete initial and recredentialing applications
2. Maintain updated staff lists
3. Manage credentialing documentation
4. Facility management for your organization



# MY DASHBOARD OVERVIEW



# My Dashboard

## Overview

- This is your organization's Dashboard, from which you can:
  - Access a list of your active staff members
  - Use the navigation pane on the left side to view open applications and access staff management page
  - Receive memos of upcoming actions and other important information

The screenshot displays the dashboard interface for a staff member. At the top right, the user is identified as 'Staff Name #2'. The main heading is 'Welcome Staff Name #2 (Pharmacy A)'. Below this, a welcome message states 'We're excited to welcome you to our growing network!' and provides a link to the 'Integra Partners Provider Manual'. A central card shows '3 Active Staff Members'. A section titled 'Action(s) Required' contains a red warning icon and the text 'The Staff Roster Confirmation is due', with a 'Click here to Resolve' link. A 'Contact Us' section provides email addresses for payer-related inquiries, claims submission, and credentialing. The footer includes copyright information for Integra Partners LLC and links to Terms of Use and Contact Us.

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## **ADD A STAFF MEMBER**

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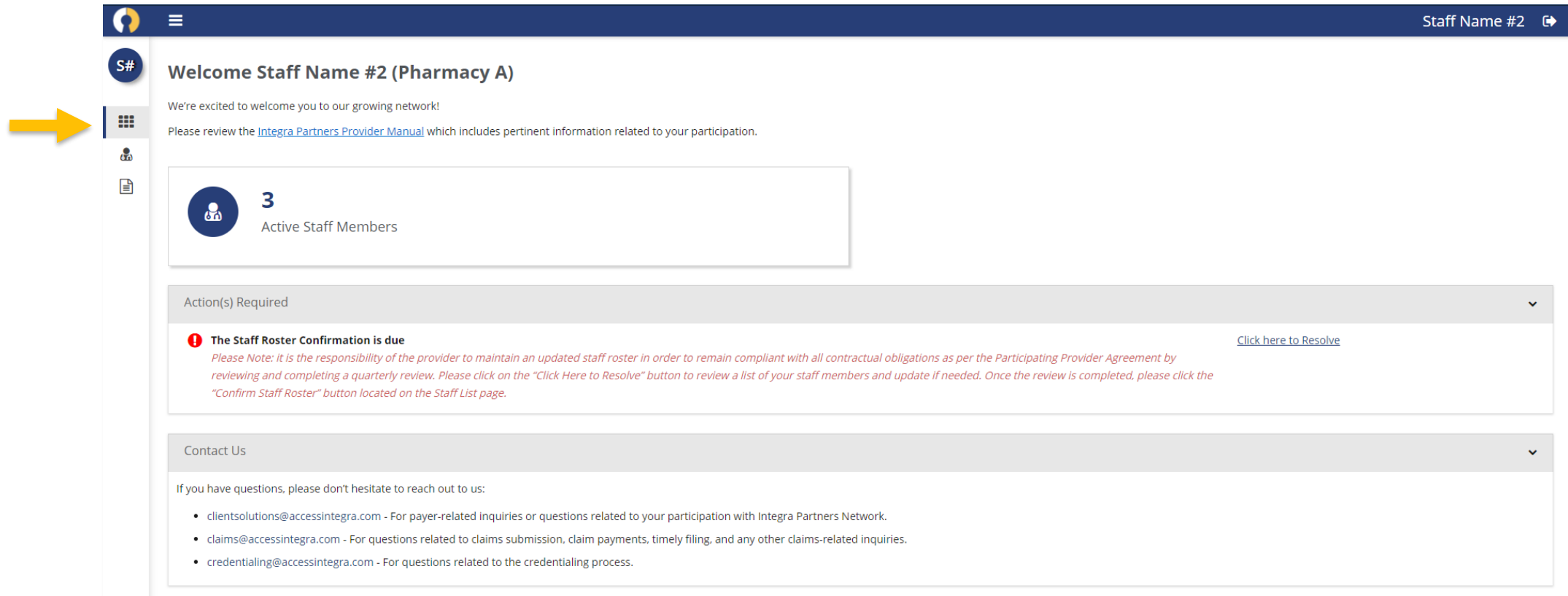


# Add a Staff Member

## When to Add a Staff Member

It is the responsibility of the provider to update new staff members as you onboard them into your organization. A staff member must be added to your roster in order to obtain information from our Customer Service and Claims department or access to any portals such as Clear and Que.

- To add a new staff member, select the 'Staff' icon from left menu bar



The screenshot displays a user interface for a staff member's profile. The top navigation bar includes a user profile icon, a menu icon, and the text "Staff Name #2". The main content area is titled "Welcome Staff Name #2 (Pharmacy A)" and includes a welcome message and a link to the "Integra Partners Provider Manual". A yellow arrow points to the "Staff" icon in the left navigation menu. Below the welcome message, there is a card showing "3 Active Staff Members". A section titled "Action(s) Required" contains a red warning icon and the text "The Staff Roster Confirmation is due", with a link to "Click here to Resolve". A "Contact Us" section provides contact information for various inquiries.

Staff Name #2

S# Welcome Staff Name #2 (Pharmacy A)

We're excited to welcome you to our growing network!

Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation.

3 Active Staff Members

Action(s) Required

**The Staff Roster Confirmation is due** [Click here to Resolve](#)

*Please Note: It is the responsibility of the provider to maintain an updated staff roster in order to remain compliant with all contractual obligations as per the Participating Provider Agreement by reviewing and completing a quarterly review. Please click on the "Click Here to Resolve" button to review a list of your staff members and update if needed. Once the review is completed, please click the "Confirm Staff Roster" button located on the Staff List page.*

Contact Us

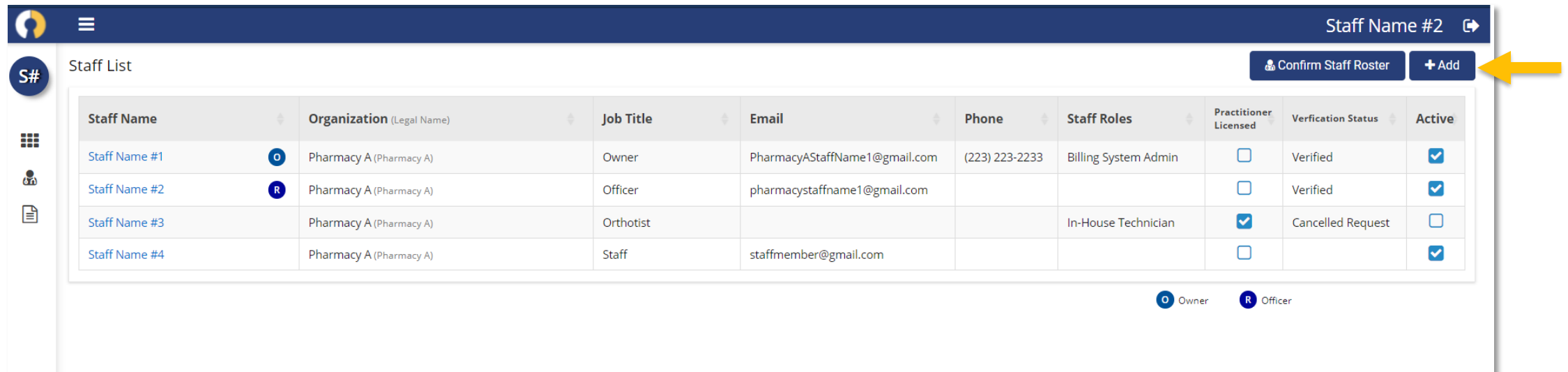
If you have questions, please don't hesitate to reach out to us:

- clientsolutions@accessintegra.com - For payer-related inquiries or questions related to your participation with Integra Partners Network.
- claims@accessintegra.com - For questions related to claims submission, claim payments, timely filing, and any other claims-related inquiries.
- credentialing@accessintegra.com - For questions related to the credentialing process.

# Add a Staff Member

## Create a New Staff Member Profile

- Click '+Add' button



The screenshot shows a web application interface for managing staff. At the top right, there is a header "Staff Name #2" with a share icon. Below this, there are two buttons: "Confirm Staff Roster" and "+ Add". A yellow arrow points to the "+ Add" button. The main content is a table with the following columns: Staff Name, Organization (Legal Name), Job Title, Email, Phone, Staff Roles, Practitioner Licensed, Verification Status, and Active. The table contains four rows of staff members. Below the table, there is a legend for roles: "O Owner" and "R Officer".

Staff Name	Organization (Legal Name)	Job Title	Email	Phone	Staff Roles	Practitioner Licensed	Verification Status	Active
Staff Name #1	Pharmacy A (Pharmacy A)	Owner	PharmacyAStaffName1@gmail.com	(223) 223-2233	Billing System Admin	<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #2	Pharmacy A (Pharmacy A)	Officer	pharmacystaffname1@gmail.com			<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #3	Pharmacy A (Pharmacy A)	Orthotist			In-House Technician	<input checked="" type="checkbox"/>	Cancelled Request	<input type="checkbox"/>
Staff Name #4	Pharmacy A (Pharmacy A)	Staff	staffmember@gmail.com			<input type="checkbox"/>		<input checked="" type="checkbox"/>

Legend: O Owner R Officer



# Add a Staff Member

## Create a New Staff Member Profile

- Enter Staff Member Details
- Pound symbols (#) indicate those fields that require verification by the Credentialing team, prior to your staff member becoming active
- Asterisks (\*) indicates required fields

Staging Environment (Sprint 32) - Provider Portal Staff Name #2

S# Create Staff Save & Add New Save Cancel

Staff Details # This data will be verified. \* This field is mandatory.

First Name \* # Middle Name #  
Last Name \* # Suffix #  
Phone Extension  
Email Job Title \*  
Organization \* # Entity/Subcontractor Entity DBA Name  
Pharmacy A Staff Member --Select--  
Ownership %  
Active # Owner # Officer # Practitioner Licensed  
Does this staff member have a licensed or certified practitioner? \* Yes No

Staff Role Details

Credentiaing Contact  Billing System Admin Please select facilities which you would like assign to this staff for submit billing

Customer Service

Driver #

In-House Technician #

Unassigned Facilities [Select All](#) Assigned Facilities [Remove All](#)

search... search...  
Location #1 - NPI: 1232343332

# Add a Staff Member

## Licensed and Certified Practitioners

- For staff members with a license or certificate, select 'Yes'
- Add the license and certificate details and upload a copy
- Pound symbols (#) indicate those fields that require verification by the Credentialing team, prior to your staff member becoming active
- Asterisks (\*) indicates required fields

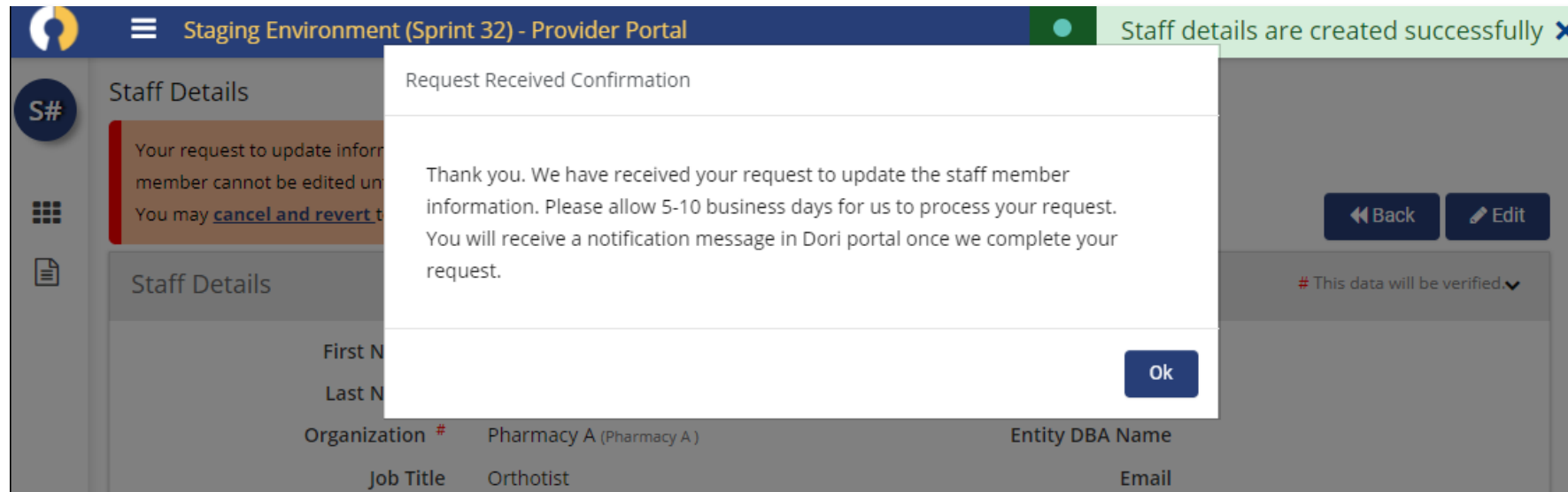
The screenshot shows the 'Create Staff' form in a Provider Portal. The form is titled 'Create Staff' and is for 'Staff Name #2'. It contains several sections:

- Staff Details:** Includes fields for First Name, Middle Name, Last Name, #3, Phone, Extension, Email, Job Title, Organization, Entity/Subcontractor, Entity DBA Name, Ownership %, SSN, and checkboxes for Active, Owner, Officer, and Practitioner Licensed. A question 'Does this staff member has a licensed or certified practitioner?' is highlighted with a yellow box, with 'Yes' selected.
- Practitioner License/Certificate:** Includes fields for State, License/Certificate, License/Certificate Number, Certifying/Licensing Body, Other Certifying/Licensing Body, License/Certificate Type, Other License/Certificate Type, Effective Date, and Expiration Date. This section is also highlighted with a yellow box.
- Staff Role Details:** Includes checkboxes for Credentialed Contact, Billing System Admin, Customer Service, Driver, and In-House Technician. It also features 'Unsigned Facilities' and 'Assigned Facilities' sections with search bars and a list of facilities.

# Add a Staff Member

## Verification for New Staff Members

- When entering a staff member such with the designation of Owner, Officer, In house technician, or delivery driver, that staff member must be verified by the Integra Credentialing department, prior to becoming active in our network.
- Should you edit fields marked with pound symbol (#) the update will remain pending until verification is completed by the credentialing department.
- Be sure to monitor the DORI portal to view your verification status.
  - When approved, changes will be immediately applied
  - Should verification be denied, you will receive an email from the credentialing team with details to support the denial



# Add a Staff Member

## Cancelling Pending Review of Staff Members

- Should you wish to cancel the pending verification review for any reason, select 'Cancel and Revert' to the previous data

The screenshot shows a web application interface for a provider portal. The top navigation bar includes a logo, a menu icon, the text "Staging Environment (Sprint 32) - Provider Portal", and "Staff Name #2" with a share icon. The main content area is titled "Staff Details" and features a prominent orange message box. The message states: "Your request to update information for this staff member has been submitted, request # 1505. Fields for this staff member cannot be edited until your request has been processed. You may [cancel and revert](#) to previous data." A yellow arrow points to the "cancel and revert" link. To the right of the message are "Back" and "Edit" buttons. Below the message is a "Staff Details" section with a red warning icon and the text "# This data will be verified." The details are presented in a table-like format:

First Name #	Staff Name	Middle Name #	
Last Name #	#3	Suffix #	
Organization #	Pharmacy A (Pharmacy A)	Entity DBA Name	
Job Title	Orthotist	Email	
Ownership %		SSN	
Phone		Extension	
Active #	Yes	Practitioner Licensed	Yes
Owner #	No	Officer #	
Verification Status	Pending Review		

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## **SET STAFF MEMBER STATUS TO INACTIVE**

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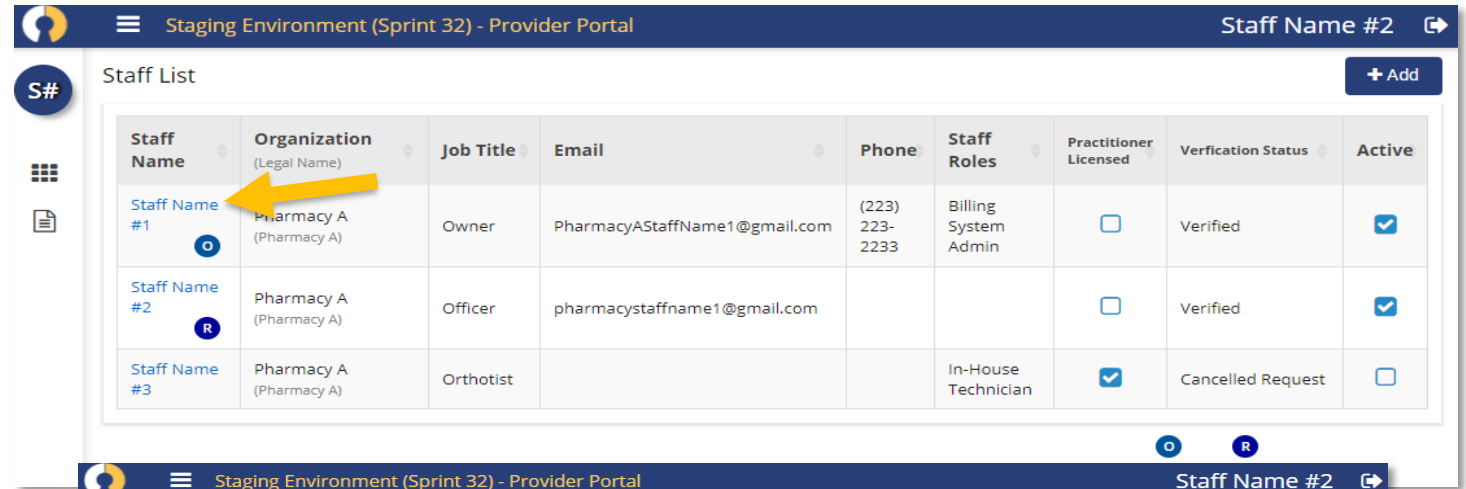


# Set Staff Member Status to Inactive

## Editing Existing Staff Member Status

All provider staff must remain up to date. Should a member of your organization leave, update the staff member profile to reflect their inactive status.

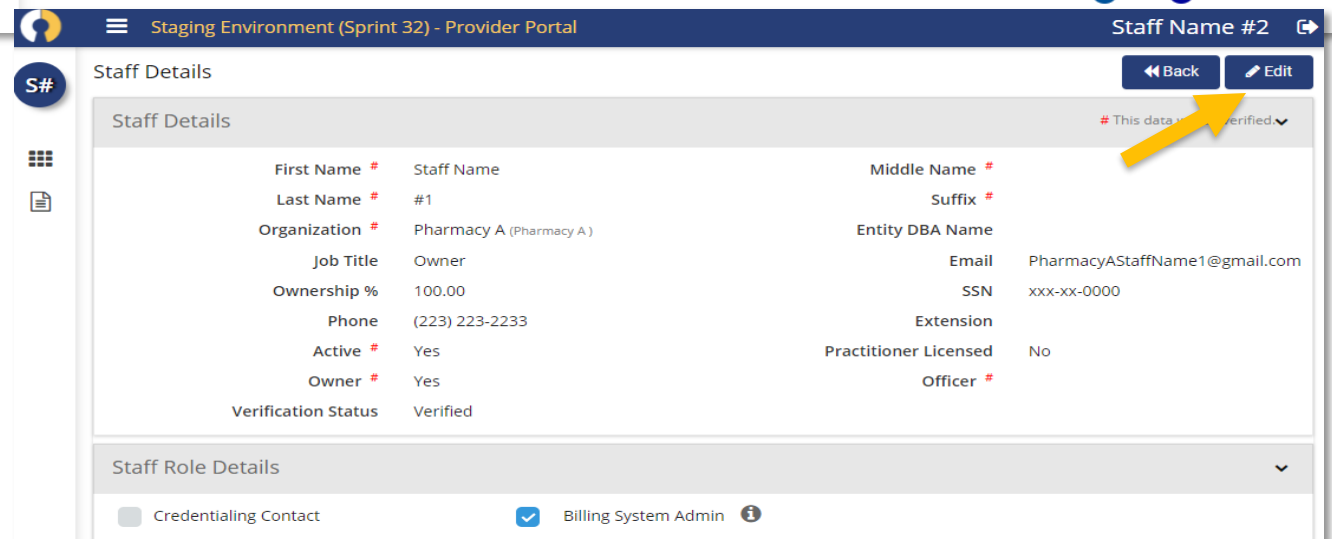
- Select an active staff member



Staff List

Staff Name	Organization (Legal Name)	Job Title	Email	Phone	Staff Roles	Practitioner Licensed	Verification Status	Active
Staff Name #1	Pharmacy A (Pharmacy A)	Owner	PharmacyAStaffName1@gmail.com	(223) 223-2233	Billing System Admin	<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #2	Pharmacy A (Pharmacy A)	Officer	pharmacystaffname1@gmail.com			<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #3	Pharmacy A (Pharmacy A)	Orthotist			In-House Technician	<input checked="" type="checkbox"/>	Cancelled Request	<input type="checkbox"/>

- Select 'Edit'



Staff Details

Back Edit

# This data is not verified.

First Name #	Staff Name	Middle Name #	
Last Name #	#1	Suffix #	
Organization #	Pharmacy A (Pharmacy A)	Entity DBA Name	
Job Title	Owner	Email	PharmacyAStaffName1@gmail.com
Ownership %	100.00	SSN	xxx-xx-0000
Phone	(223) 223-2233	Extension	
Active #	Yes	Practitioner Licensed	No
Owner #	Yes	Officer #	
Verification Status	Verified		

Staff Role Details

Credentialing Contact  Billing System Admin *i*

# Set Staff Member Status to Inactive

## Inactive Staff Member Status

- In the Edit Staff page, uncheck the 'Active' box

Staging Environment (Sprint 32) - Provider Portal Staff Name #2

Edit Staff Save & Add New Save Cancel

Staff Details # This data will be verified. \* This field is mandatory.

First Name \* # Middle Name #

Staff Name

Last Name \* # Suffix #

#1 --Select--

Phone Extension

(223) 223-2233

Email \* Job Title \*

PharmacyAStaffName1@gmail.com Owner

Organization \* # Entity/Subcontractor Entity DBA Name

Pharmacy A Staff Member --Select--

Ownership %

100.00

SSN

xxx-xx-0000

Active # Owner # Officer #

Practitioner Licensed Verification Status

Verified

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## **EDIT STAFF MEMBER DETAILS**

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# Edit Staff Member Details

## Updating Existing Staff Member Information

It is important to keep your staff member information up to date and will ensure Integra contacts the correct person regarding important matters pertaining to claims, orders and compliance.

- Select the staff member

The image shows two screenshots from a web application. The top screenshot is the 'Staff List' page, which displays a table of staff members. A yellow arrow points to the 'Staff Name #1' row. The bottom screenshot is the 'Staff Details' page for 'Staff Name #2', with a yellow arrow pointing to the 'Edit' button in the top right corner.

Staff Name	Organization (Legal Name)	Job Title	Email	Phone	Staff Roles	Practitioner Licensed	Verification Status	Active
Staff Name #1	Pharmacy A (Pharmacy A)	Owner	PharmacyAStaffName1@gmail.com	(223) 223-2233	Billing System Admin	<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #2	Pharmacy A (Pharmacy A)	Officer	pharmacystaffname1@gmail.com			<input type="checkbox"/>	Verified	<input type="checkbox"/>
Staff Name #3	Pharmacy A (Pharmacy A)	Orthotist			In-House Technician	<input checked="" type="checkbox"/>	Cancelled Request	<input type="checkbox"/>

Field	Value	Field	Value
First Name	Staff Name	Middle Name	
Last Name	#2	Suffix	
Organization	Pharmacy A (Pharmacy A)	Entity DBA Name	
Job Title	Officer	Email	pharmacystaffname1@gmail.com
Ownership %		SSN	
Phone		Extension	
Active	No	Practitioner Licensed	No
Owner	No	Officer	Yes
Verification Status	Verified		

- Select 'Edit'

# Edit Staff Member Details

## Updating Existing Staff Member Information

- Update staff member details and click 'Save'

The screenshot shows the 'Edit Staff' form in a provider portal. The form is titled 'Edit Staff' and has a 'Staff Name #2' header. The form contains the following fields and controls:

- Staff Details** (Header with a warning: '# This data will be verified. \* This field is mandatory.')
- First Name \***: Text input field containing 'Staff Name'.
- Middle Name #**: Text input field containing 'Adding'.
- Last Name \***: Text input field containing '#2'.
- Suffix #**: Dropdown menu with '--Select--' selected.
- Phone**: Text input field (empty).
- Extension**: Text input field (empty).
- Email**: Text input field containing 'pharmacystaffname1@gmail.com'.
- Job Title \***: Text input field containing 'Officer'.
- Organization \***: Dropdown menu with 'Pharmacy A' selected.
- Entity/Subcontractor**: Radio button (unchecked) next to 'Staff Member'.
- Entity DBA Name**: Dropdown menu with '--Select--' selected.
- Ownership %**: Text input field (empty).
- SSN**: Text input field (empty).
- Active #**: Checkmark (checked).
- Owner #**: Radio button (unchecked).
- Officer #**: Checkmark (checked).
- Practitioner Licensed**: Radio button (unchecked).
- Verification Status**: Text input field containing 'Verified'.

At the top right of the form, there are three buttons: 'Save & Add New', 'Save', and 'Cancel'. A yellow arrow points to the 'Save' button.

# Edit Staff Member Details

## Verification for Edited Staff Member Details

- Fields marked with pound symbols (#) must be verified. If verification is required, you will be prompted to acknowledge the following message:

“Thank you. We have received your request to update the staff member information. Please allow 5-10 business days for us to process your request. You will receive a notification message in DORI portal once we complete your request.”

The screenshot displays a web application interface for editing staff member details. A modal dialog box titled "Request Received Confirmation" is centered on the screen, containing the following text: "Thank you. We have received your request to update the staff member information. Please allow 5-10 business days for us to process your request. You will receive a notification message in Dori portal once we complete your request." Below the text is an "Ok" button. The background shows the "Staff Details" form with various fields. A yellow box highlights a field with the text "# This data will be verified".

Field	Value
Organization #	Pharmacy A (Pharmacy A)
Job Title	Officer
Ownership %	
Phone	
Active #	Yes
Owner #	No
Verification Status	Pending Review

# Edit Staff Member Details

## Success!

- When no verification is required, the details are saved instantly, and a green banner will alert you when the update is complete

Staging Environment (Sprint 32) - Provider Portal

Staff details are updated successfully

Staff Details

Staff Details

# This data will be verified.

First Name #	Staff Name	Middle Name #	
Last Name #	#4	Suffix #	
Organization #	Pharmacy A (Pharmacy A)	Entity DBA Name	
Job Title	Staff	Email	staffmember@gmail.com
Ownership %		SSN	
Phone		Extension	
Active #	Yes	Practitioner Licensed	No
Owner #	No	Officer #	

Verification Status

Staff Role Details

- Credentialing Contact
- Billing System Admin *i*
- Customer Service
- Driver #

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## **CONFIRM YOUR ORGANIZATION STAFF ROSTER**

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# Confirm Your Organization's Staff Roster

## Staff Roster Reminder Alert

It is the responsibility of the provider to maintain an updated staff roster in order to remain compliant with all contractual obligations as per the Participating Provider Agreement by reviewing and completing a quarterly review.

The screenshot shows a web application interface for a pharmacy. At the top, there is a dark blue header with a logo on the left, a menu icon, and the text "Staff Name #2" with a share icon on the right. Below the header, the main content area is white. On the left side, there is a vertical sidebar with icons for a profile, a grid, a person, and a document. The main content area starts with a "Welcome Staff Name #2 (Pharmacy A)" section, followed by a message: "We're excited to welcome you to our growing network! Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation." Below this is a card with a blue circle containing a person icon and the number "3", with the text "Active Staff Members" underneath. Further down is a section titled "Action(s) Required" with a dropdown arrow. Inside this section, there is a red warning icon and the text "The Staff Roster Confirmation is due". Below this is a red italicized note: "Please Note: it is the responsibility of the provider to maintain an updated staff roster in order to remain compliant with all contractual obligations as per the Participating Provider Agreement by reviewing and completing a quarterly review. Please click on the 'Click Here to Resolve' button to review a list of your staff members and update if needed. Once the review is completed, please click the 'Confirm Staff Roster' button located on the Staff List page." To the right of this note is a blue link "Click here to Resolve". Below the "Action(s) Required" section is a "Contact Us" section with a dropdown arrow. It contains the text "If you have questions, please don't hesitate to reach out to us:" followed by a bulleted list of email addresses and their purposes: "clientsolutions@accessintegra.com - For payer-related inquiries or questions related to your participation with Integra Partners Network.", "claims@accessintegra.com - For questions related to claims submission, claim payments, timely filing, and any other claims-related inquiries.", and "credentialing@accessintegra.com - For questions related to the credentialing process." At the bottom of the page, there is a footer with the text "©2021 Integra Partners LLC" and links for "Terms of Use" and "Contact Us".

Staff Name #2

S# Welcome Staff Name #2 (Pharmacy A)

We're excited to welcome you to our growing network!

Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation.

3 Active Staff Members

Action(s) Required

**The Staff Roster Confirmation is due** [Click here to Resolve](#)

*Please Note: it is the responsibility of the provider to maintain an updated staff roster in order to remain compliant with all contractual obligations as per the Participating Provider Agreement by reviewing and completing a quarterly review. Please click on the "Click Here to Resolve" button to review a list of your staff members and update if needed. Once the review is completed, please click the "Confirm Staff Roster" button located on the Staff List page.*

Contact Us

If you have questions, please don't hesitate to reach out to us:

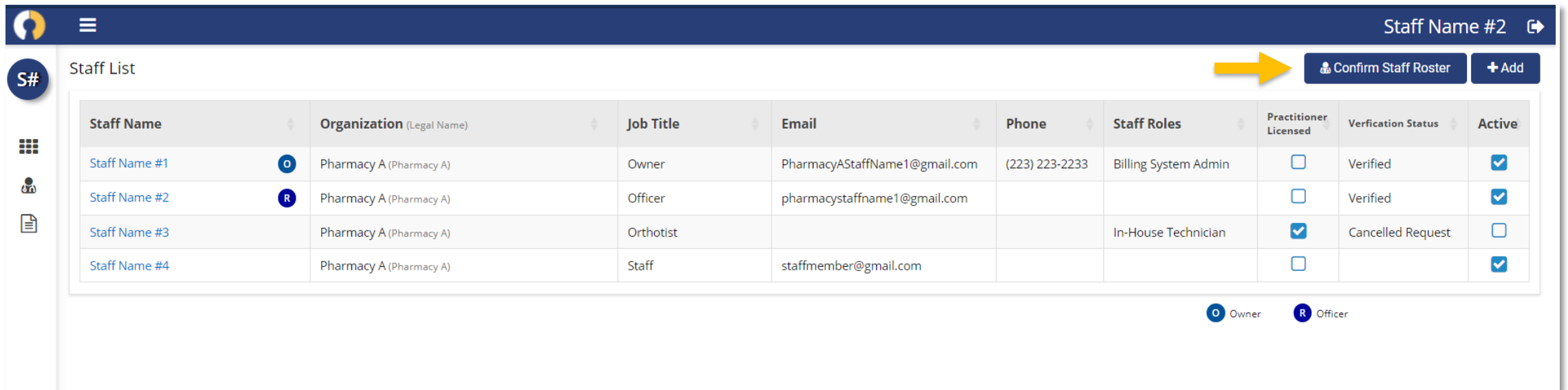
- clientsolutions@accessintegra.com - For payer-related inquiries or questions related to your participation with Integra Partners Network.
- claims@accessintegra.com - For questions related to claims submission, claim payments, timely filing, and any other claims-related inquiries.
- credentialing@accessintegra.com - For questions related to the credentialing process.

©2021 Integra Partners LLC [Terms of Use](#) [Contact Us](#)

# Edit Staff Member Details

## Confirm Your Staff Roster

- Please Click on 'Confirm Staff Roster' button to acknowledge your staff roster



Staff List

Staff Name #2

Confirm Staff Roster + Add

Staff Name	Organization (Legal Name)	Job Title	Email	Phone	Staff Roles	Practitioner Licensed	Verification Status	Active
Staff Name #1	Pharmacy A (Pharmacy A)	Owner	PharmacyAStaffName1@gmail.com	(223) 223-2233	Billing System Admin	<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #2	Pharmacy A (Pharmacy A)	Officer	pharmacystaffname1@gmail.com			<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #3	Pharmacy A (Pharmacy A)	Orthotist			In-House Technician	<input checked="" type="checkbox"/>	Cancelled Request	<input type="checkbox"/>
Staff Name #4	Pharmacy A (Pharmacy A)	Staff	staffmember@gmail.com			<input type="checkbox"/>		<input checked="" type="checkbox"/>

Owner Officer

# Confirm Your Organization's Staff Roster

## Confirm Your Staff Roster

- Click 'Yes' to confirm your roster is current as of the date of acceptance

The screenshot displays a web application interface for managing a staff roster. A modal dialog box titled "Staff Roster Confirmation" is centered on the screen, asking "Are you sure you want to confirm staff roster - Yes / No?". A yellow arrow points to the "Yes" button. The background shows a "Staff List" table with columns for Staff Name, Organization, Phone, Staff Roles, Practitioner Licensed, Verification Status, and Active. A legend at the bottom right identifies "O" as Owner and "R" as Officer.

Staff Name	Organization (Legal Name)	Phone	Staff Roles	Practitioner Licensed	Verification Status	Active
Staff Name #1	Pharmacy A (Pharmacy A)	(223) 223-2233	Billing System Admin	<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #2	Pharmacy A (Pharmacy A)		Officer	<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>
Staff Name #3	Pharmacy A (Pharmacy A)		Orthotist	<input checked="" type="checkbox"/>	Cancelled Request	<input type="checkbox"/>
Staff Name #4	Pharmacy A (Pharmacy A)		Staff	<input type="checkbox"/>		<input checked="" type="checkbox"/>



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## MANAGE COMPLIANCE DOCUMENTS

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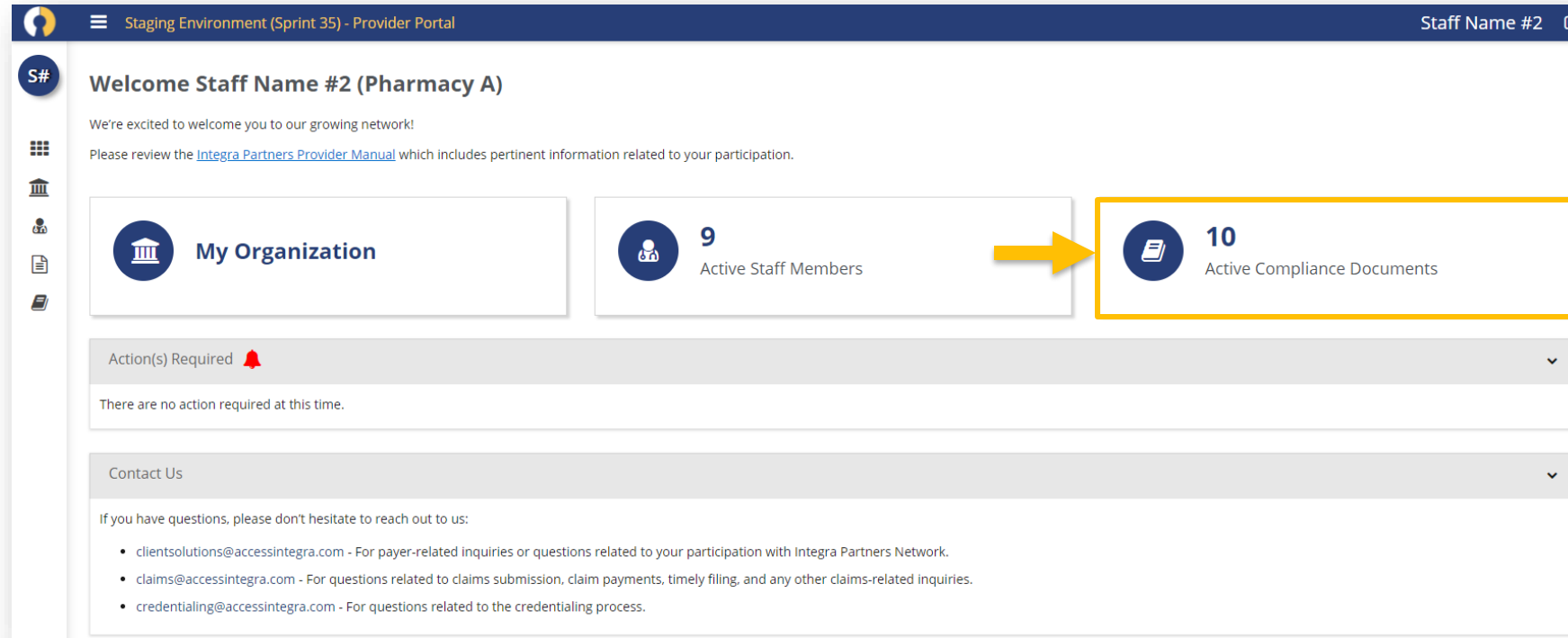


# Manage Your Organizations Compliance Documents

## Access Active Documents

Access your organization and compliance documentation details directly from your dashboard to view content about your organization and required licenses and certificates.

- Access compliance documents by clicking the 'Active Compliance Documents' box from your dashboard



The screenshot displays a web dashboard for a provider portal. At the top, the header reads "Staging Environment (Sprint 35) - Provider Portal" and "Staff Name #2". The main content area is titled "Welcome Staff Name #2 (Pharmacy A)" and includes a welcome message and a link to the "Integra Partners Provider Manual". Below this, there are three main dashboard cards: "My Organization" (with a building icon), "9 Active Staff Members" (with a person icon), and "10 Active Compliance Documents" (with a document icon). A yellow arrow points from the "Active Staff Members" card to the "Active Compliance Documents" card, which is highlighted with a yellow border. Below these cards, there are two sections: "Action(s) Required" (with a red bell icon) and "Contact Us". The "Action(s) Required" section states "There are no action required at this time." The "Contact Us" section provides contact information for various inquiries.


Staging Environment (Sprint 35) - Provider Portal Staff Name #2

S# Welcome Staff Name #2 (Pharmacy A)

We're excited to welcome you to our growing network!

Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation.

My Organization 9 Active Staff Members 10 Active Compliance Documents

Action(s) Required 

There are no action required at this time.

Contact Us

If you have questions, please don't hesitate to reach out to us:

- [clientsolutions@accessintegra.com](mailto:clientsolutions@accessintegra.com) - For payer-related inquiries or questions related to your participation with Integra Partners Network.
- [claims@accessintegra.com](mailto:claims@accessintegra.com) - For questions related to claims submission, claim payments, timely filing, and any other claims-related inquiries.
- [credentialing@accessintegra.com](mailto:credentialing@accessintegra.com) - For questions related to the credentialing process.

# Manage Your Organizations Compliance Documents

## Expiring Documents

Staying current with documentation is essential to remain compliant and in good standing within the Integra network.

- Filter for expiring documents by searching the Facility Name, NPI and Expiration Date range.

The screenshot displays the 'Compliance Documents' interface in a 'Staging Environment (Sprint 35) - Provider Portal'. The main table lists various documents with columns for Document ID, Document Type, Organization Name, Expiration Date, Days to Expiration, Verification Status, and Active status. A search modal is open, allowing users to filter documents by Store/Facility Name, NPI, Expiring From Date, Expiring To Date, Document Type, and No of Days till Expiration Date. A yellow arrow points to the 'Filter' button in the main interface, and another yellow arrow points to the 'Search' button in the modal.

Document ID	Document Type	Organization Name(Legal Name)	Expiration Date	Days to Expiration	Verification Status	Active
7194	Business License	Pharmacy A (Pharmacy B)	01/01/2022	185		<input checked="" type="checkbox"/>
2139	Accreditation	Pharmacy A (Pharmacy B)	11/26/2022	514	Verified	<input checked="" type="checkbox"/>
986	COI	Pharmacy A (Pharmacy B)	01/01/2022	185		<input checked="" type="checkbox"/>
992	COI	Pharmacy A (Pharmacy B)	10/02/2021	94	Verified	<input checked="" type="checkbox"/>
1297	Surety Bond	Pharmacy A (Pharmacy B)	10/22/2021	114	Verified	<input checked="" type="checkbox"/>
1298	Surety Bond	Pharmacy A (Pharmacy B)			Verified	<input checked="" type="checkbox"/>
1290	Surety Bond	Pharmacy A (Pharmacy B)	06/28/2021	-2	Verified	<input checked="" type="checkbox"/>
2650	Medicaid	Pharmacy A (Pharmacy B)	03/01/2022	244		<input checked="" type="checkbox"/>
7195	Practitioner Certificate	Pharmacy A (Pharmacy B)	05/01/2022	305		<input type="checkbox"/>
7200	Practitioner Certificate	Pharmacy A (Pharmacy B)	10/15/2021	107		<input checked="" type="checkbox"/>

# Manage Your Organizations Compliance Documents

## Add New Documents

Documentation must be updated whenever there is a change to information (e.g., license number, licensing body, etc.) to maintain compliance.

- To add new documents, first click '+ Add Compliance Document'
- Select the description from the dropdown menu that corresponds to the document type and upload the updated document to the portal

The screenshot displays the 'Compliance Documents' interface in a 'Staging Environment (Sprint 35) - Provider Portal'. The page title is 'Staff Name #2'. The main content area shows a table of existing documents with columns for Document ID, Document Type, Organization Name (Legal Name), Facility/Staff Name, Expiration Date, Days to Expiration, Verification Status, and Active status. A dropdown menu is open over the '+ Add Compliance Document' button, listing options: Facility Business License, Facility Medicaid, Facility Surety Bond, Facility COI, Facility Accreditation, and Staff Practitioner License. A yellow arrow points from the dropdown menu to the '+ Add Compliance Document' button. The table below shows various documents with their respective details, including expiration dates and verification statuses.

Document ID	Document Type	Organization Name (Legal Name)	Facility/Staff Name	Expiration Date	Days to Expiration	Verification Status	Active
7194	Business License	Pharmacy A (Pharmacy B)	Location #	01/2022	185		<input checked="" type="checkbox"/>
2139	Accreditation	Pharmacy A (Pharmacy B)	Location #	06/2022	514	Verified	<input checked="" type="checkbox"/>
986	COI	Pharmacy A (Pharmacy B)	Location #	01/2022	185		<input checked="" type="checkbox"/>
992	COI	Pharmacy A (Pharmacy B)	Location #	02/2021	94	Verified	<input checked="" type="checkbox"/>
1297	Surety Bond	Pharmacy A (Pharmacy B)	Location #	02/2021	114	Verified	<input checked="" type="checkbox"/>
1298	Surety Bond	Pharmacy A (Pharmacy B)	Location #			Verified	<input checked="" type="checkbox"/>
1290	Surety Bond	Pharmacy A (Pharmacy B)	Location #	08/2021	-2	Verified	<input checked="" type="checkbox"/>
2650	Medicaid	Pharmacy A (Pharmacy B)	Location #	01/2022	244		<input checked="" type="checkbox"/>
7195	Practitioner Certificate	Pharmacy A (Pharmacy B)	Staff Name	01/2022	305		<input type="checkbox"/>
7200	Practitioner Certificate	Pharmacy A (Pharmacy B)	practitioner	05/2021	107		<input checked="" type="checkbox"/>

# Manage Your Organizations Compliance Documents

## Edit Documentation

Update pre-existing details and add new information about your certificates and licenses directly from the portal. All new or updated information included in your documentation must be entered in DORI.

- To edit or add new information, select the Document ID you wish to edit
- Select 'Edit' in the top right and enter the new or updated information

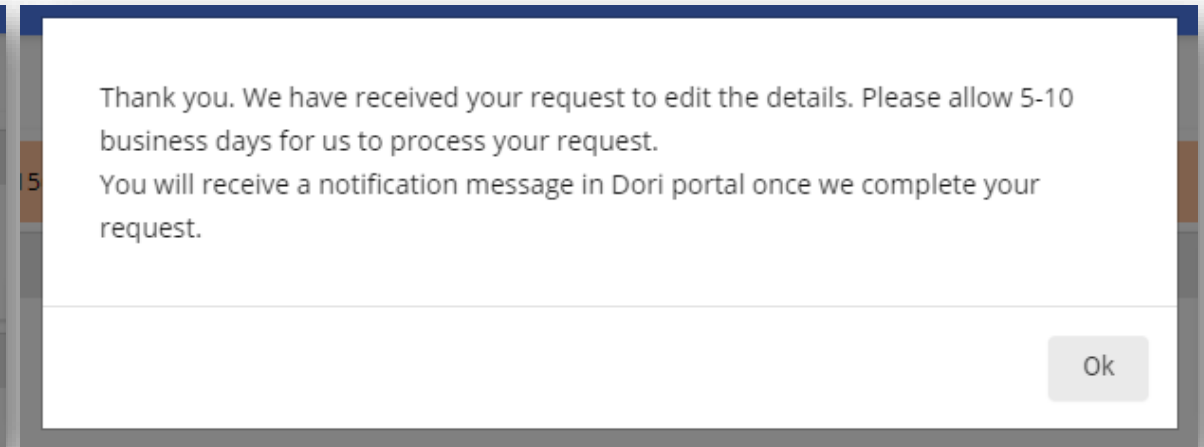
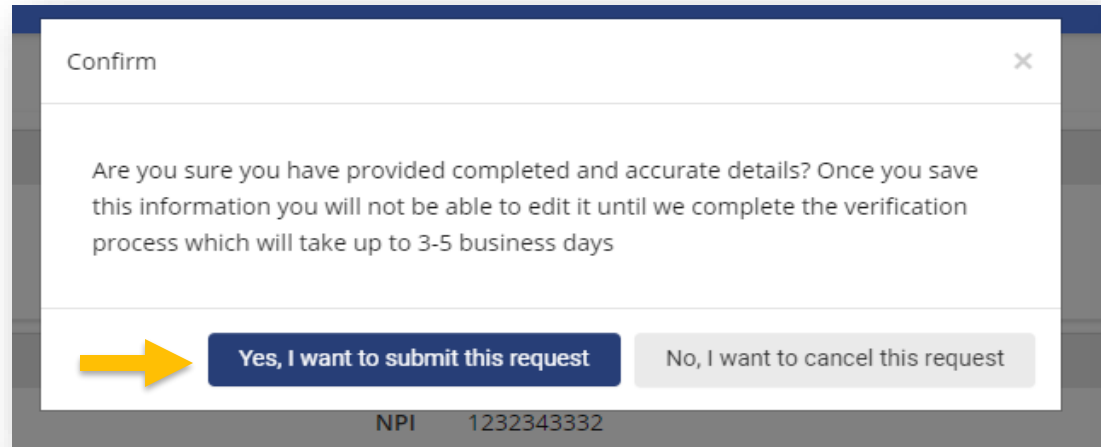
The screenshot displays the 'Staging Environment (Sprint 35) - Provider Portal' interface. The top navigation bar includes a menu icon, the page title, and the user's name 'Staff Name #2'. The main content area is divided into two sections. The left section, titled 'Compliance Documents', features a table with columns for Document ID, Document Type, Organization Name, Facility/Staff Name, NPI, Document #, Effective Date, Expiration Date, Days to Expiration, Verification Status, and Active. A yellow arrow points to the first row of the table, which has Document ID 7194 and Document Type 'Business License'. The right section, titled 'Facility License/Certificate', shows the 'Edit' form for the selected document. A yellow arrow points to the 'Edit' button in the top right corner of this form. The form contains fields for Organization (DBA Name, Legal Name, Tax ID, Email, Status), Facility (Store Name, Location #1, NPI, Status), and Facility License/Certificate (Facility Name, State, License Number, Other Licensing Body, License Type, Effective Date, Expiration Date, Attachment, Verification Status). The 'Attachment' field shows a file named 'TEST DOC.pdf'.

Document ID	Document Type	Organization Name (Legal Name)	Facility/Staff Name	NPI	Document #	Effective Date	Expiration Date	Days to Expiration	Verification Status	Active
7194	Business License	Pharmacy A (Pharmacy B)	Location #1	1232343332	111111	12/01/2020	01/01/2022	185		<input checked="" type="checkbox"/>
2139	Accreditation	Pharmacy A (Pha								
986	COI	Pharmacy A (Pha								
992	COI	Pharmacy A (Pha								
1297	Surety Bond	Pharmacy A (Pha								
1298	Surety Bond	Pharmacy A (Pha								
1290	Surety Bond	Pharmacy A (Pha								
2650	Medicaid	Pharmacy A (Pha								
7195	Practitioner Certificate	Pharmacy A (Pha								
7200	Practitioner Certificate	Pharmacy A (Pha								

# Manage Your Organizations Compliance Documents

## Edit Documentation: Confirm Your Submission

- Once all new and updated information is properly entered, you will be prompted to confirm your submission. At this time, your organization details will be sent to Integra's Credentialing Department for review and verification.
- Please allow 5-10 business days for your request to process.



# Manage Your Organizations Compliance Documents

## Verification of Your Request

- Notifications of request verification or denial will appear on your dashboard.
- In some cases, information is denied due to mismatching details, expired, or missing information. Should the request be denied, a member of our Credentialing team will reach out to you with a description of the denial reason and steps for remediation.

Staging Environment (Sprint 35) - Provider Portal Staff Name #2

**S#** **Welcome Staff Name #2 (Pharmacy A)**

We're excited to welcome you to our growing network!

Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation.

**My Organization**

**8** Active Staff Members

**8** Active Compliance Documents

**Action(s) Required**

- The COI Verification is approved** [Click here to Review](#)  
*Your request to add/edit the COI details was approved*
- The SuretyBond Verification is denied** [Click here to Resolve](#)  
*Your request to add/edit the SuretyBond details was not approved. An email notification with an additional details will be sent within next 24-48 hours to your organization owner or officer*

# MANAGE FACILITIES





# Manage Your Organizations Facilities

## View Facility Details

Manage your facility details and participation in our network. New Facilities must complete Integra's credentialing process to be eligible for servicing members.

The screenshot displays the 'Staging Environment (Sprint 35) - Provider Portal' for 'Staff Name #2'. The main content area is titled 'Welcome Staff Name #2 (Account for Pharmacy A)' and includes a welcome message and a link to the 'Integra Partners Provider Manual'. Below this, four key metrics are presented in cards: 'My Organization', '21 Active Staff Members', '26 Active Compliance Documents', and '2 Active Facilities'. A section titled 'Action(s) Required' with a red bell icon indicates that there are no actions required at this time. Finally, a 'Contact Us' section provides email addresses for payer-related inquiries, claims submission, and credentialing.

Staging Environment (Sprint 35) - Provider Portal Staff Name #2

S# **Welcome Staff Name #2 (Account for Pharmacy A)**

We're excited to welcome you to our growing network!

Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation.

**My Organization**

**21** Active Staff Members

**26** Active Compliance Documents

**2** Active Facilities

Action(s) Required

There are no action required at this time.

Contact Us

If you have questions, please don't hesitate to reach out to us:

- [clientsolutions@accessintegra.com](mailto:clientsolutions@accessintegra.com) - For payer-related inquiries or questions related to your participation with Integra Partners Network.
- [claims@accessintegra.com](mailto:claims@accessintegra.com) - For questions related to claims submission, claim payments, timely filing, and any other claims-related inquiries.
- [credentialing@accessintegra.com](mailto:credentialing@accessintegra.com) - For questions related to the credentialing process.

# Manage Your Organizations Facilities

## View Facility Details

- This is the Facility List page; you can view all your facilities and to add a new facility

The screenshot displays the 'Facility List' page in a provider portal. The page header includes 'Staging Environment (Sprint 35) - Provider Portal' and 'Staff Name #2'. A sidebar on the left contains navigation icons. The main content area features a table with the following data:

Facility Name	Organization (Legal Name)	NPI	Address	Phone Number	Main Location	Verification Status	Active
					<input type="checkbox"/>		<input type="checkbox"/>
Facility CV	✓ Pharmacy A (Pharmacy A&B)	2223332222	524 Clarkson Avenue 524 Clarkson Avenue Brooklyn, IL 11203	(718) 774-1656	<input type="checkbox"/>	Pending Review	<input type="checkbox"/>
Facility D	✓ Pharmacy A (Pharmacy A&B)	2222222222	1111 Daisy Blvd. Tampa, FL 33432		<input type="checkbox"/>	Pending Review	<input type="checkbox"/>
Location #1	✓ Pharmacy A (Pharmacy A&B)	1232343332	100 Pharmacy Drive New York, NY 11101	(111) 111-1111	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

A '+ Add' button is located in the top right corner of the table area, highlighted with a yellow box.

# Manage Your Organizations Facilities

## Add New Facilities

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- Please have documentation readily available in order to complete the request to add a new facility.

### Adding New Facility Requirement:

In order to submit a request to add a facility to your organization, you will need the following information readily available to upload into the Credentialing portal. Please also note, all documentation must be updated to reflect the facility address you are adding in order to complete the Credentialing process.

- Updated W9
- Accreditation for new location
- Business Licenses for new location
- Medicaid Provider ID(s) serviced by new location
- COI covering new location with Integra Partners as Certificate Holder (please see sheet for requirements)
- Surety Bond of \$50,000 covering new location

# Manage Your Organizations Facilities

## Track Your Progress

- Track your progress using the interactive navigation bar at the top of the page.
- Click navigation bar to move forward or backwards between sections.

Staging Environment (Sprint 35) - Provider Portal Staff Name #2

S# Manage Facility

Facility Licenses Accreditations COIs Surety Bonds Medicaid Languages State and Counties Products Submit

Save Save & Next

Organization

DBA Name	Pharmacy A	Legal Name	Pharmacy A&B	Status	Active
Tax ID	22-222222	Email		Phone	

Create Facility

Facility Name \*

NPI \*

Phone Number

Address Line 1 \*

City \*

State \*

Handicap Accessible

Tax ID

22-222222

Main Location

Medicare Number \*

Fax Number

Address Line 2

Zip Code \*

County

Active Facility

Associated Organization DBA Name

Pharmacy A

Associated Organization Legal Name

Pharmacy A&B

# Manage Your Organizations Facilities

## New Facility Credentialing

- Upon successfully completed each section, your new facility is ready to begin the Credentialing process.

The screenshot displays a confirmation message in a white box with a yellow border. The message reads: "Thank you. We have received your request to edit the details. Please allow 5-10 business days for us to process your request. You will receive a notification message in Dori portal once we complete your request." Below the message is an "Ok" button.

The background shows a "Provider Portal" interface. At the top, it says "t (Sprint 35) - Provider Portal". Below this, there is a notification bar: "Request 1646 for Facility data modification, hence you can view...".

The main content area shows details for a facility named "Pharmacy A". The details are as follows:

Facility Name	Pharmacy G	Main Location	No
NPI	1112322222	Medicare Number	999999
Phone Number	(222) 222-2222	Fax Number	
Address Line 1	102 Pharmacy Lane	Address Line 2	
City	Club City	State	NY
Zip Code	11203	County	Albany
Handicap Accessible	Yes	Active	No
Tax ID	22222222	Verification Status	Pending Review

# Manage Your Organizations Facilities

## New Facility Credentialing

- Notifications of request verification or denial will appear on your dashboard.
- In some cases, information is denied due to mismatching details, expired, or missing information. Should the request be denied, a member of our Credentialing team will reach out to you with a description of the denial reason and steps for remediation.

Staging Environment (Sprint 35) - Provider Portal Staff Name #2

**S#** **Welcome Staff Name #2 (Account for Pharmacy A )**

We're excited to welcome you to our growing network!

Please review the [Integra Partners Provider Manual](#) which includes pertinent information related to your participation.

- My Organization**
- 21** Active Staff Members
- 22** Active Compliance Documents
- 3** Active Facilities

**Action(s) Required** 🔔

- ❗ The Facility Verification is denied** [Click here to Resolve](#)  
*Your request to add/edit the Facility details was not approved. An email notification with an additional details will be sent within next 24-48 hours to your organization owner or officer*
- ❗ The Facility Verification is approved** [Click here to Review](#)  
*Your request to add/edit the Facility details was approved.*

## Questions? Contact Us

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Please don't hesitate to reach out to our DORI help team regarding any information in this document, the DORI platform or the Credentialing process:

[Credentialing@accessintegra.com](mailto:Credentialing@accessintegra.com)