

# ANNUAL UPDATE INSTRUCTIONS

*LAST UPDATED: JANUARY 17, 2023*

## PURPOSE

The purpose of the upcoming changes and activities in the portal is to:

1. Review and update (if necessary) all portal registration information including contacts (roles), company summary, payer details and users (permissions).
2. Evaluate 2023 data against all validation rules by resetting all existing Profile- and Exemption-Level validation rule overrides.

These updates will ensure the accuracy and quality of registration and validation information within the MHDO Payer Data Portal.

## TIMELINES

Task	Date
<b>Last day files for any period will be accepted before annual validation override reset</b>	1/30/23
Files submitted on this day will be held and processed on 2/1/23	1/31/23
<b>Submission of files with January 2023 data - Annual override reset</b>	2/1/23
Annual registration information updates are due	2/28/23
<b>January 2023 data files are due</b>	2/28/23

## ANNUAL REGISTRATION UPDATE INSTRUCTIONS

**Action Required from:** Administrative Users

1. **Login.** Log in to the MHDO Payer Data Portal between February 1<sup>st</sup> and February 28<sup>th</sup>.
2. **Review and Update [Users \(Permissions\)](#)**

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- a. One Administrative User from each company must review and update her/his company's users in order to complete the 2023 annual registration. Please add, remove or change permissions for users, as needed.
  - b. An explanation of permissions can be found in the [User Manual](#).
  3. **Review and Update [Contacts \(Roles\)](#)**
    - a. **Non-claims-based payment (NCBP) and aggregated claims-based -payment (ACBP) contact roles.** Each company must designate at least one person for each type. These individuals will receive important information about upcoming requirements and milestones.
      - i. NCBP/ACBP Administrator – Responsible for annual registration and managing company users and contacts.
      - ii. NCBP/ACBP Compliance – Responsible for ensuring NCBP/ACBP data submissions meet requirements and deadlines.
      - iii. NCBP/ACBP Submitter – Responsible for submitting NCBP/ACBP data.
    - b. **Claims Contact Roles.** Each company must have at least one Administrative and one Compliance Contact. Each company must also have at least one contact for each file type submitted (Eligibility, Medical, Dental, and Pharmacy). The same person can be listed as multiple contact types and multiple people can be listed for each contact type. Accurate information ensures the appropriate individuals receive emails from the MHDO and the MHDO Payer Data Portal.
    - c. An explanation of roles can be found in the [User Manual](#).
  4. **Review and Update [Summary](#).**
    - a. Administrative Users have permission to edit all information on this page. Please make any necessary updates to the company's Third-Party Submitter and On-Behalf Submissions at the bottom of the screen. If you have questions regarding the definitions or reason for collecting this information, please see the user manual or contact the help desk prior to making any changes.
    - b. **Click Edit [Payer Details](#).** One Administrative User from each company must review and update information regarding the types of claims your company will be submitting or will be submitted on your company's behalf and specify coverage details, as appropriate.
    - c. **Non-Claims-Based Payments Question.** Please indicate if your company has non-claim-based payments to submit or be submitted on your behalf and indicate the types of NCBPs, if known.
    - d. **NEW Redacted Medical and/or Pharmacy Claims Question.** Please indicate if your company has redacted claims to submit as part of an aggregated file.
    - e. **Indicate Completion of 2023 Updates.** One Administrative User from each company must indicate that 2023 registration updates are done by selecting "Complete 2023 Annual Registration Update" **by Tuesday, February 28<sup>th</sup>**.

## VALIDATION OVERRIDE REVIEW INSTRUCTIONS

**Action Required from:** Data Submitters

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1. **Review 2022 [Validation Report](#).** Information about how your data performed against the validation rules in the past can be found in the Validation Report. Further instructions for using the report with screen shots can be found in the [User Manual](#).
  2. **Submit January 2023 Data.** Submit your January 2023 data to the MHDO Payer Data Portal between February 1<sup>st</sup> and February 28<sup>th</sup>. Note: If you are unable to submit your data by February 28<sup>th</sup>, these instructions still apply.
  3. **Review and Resolve Validation Issues.** The resetting of all Profile and Exemption-Level overrides will require most users to review and resolve validation issues. Only after structural issues have been resolved can you select “Resolve” for a given Profile or Exemption-Level issue. You will then see a history of past overrides for that rule (if there are any), including the reason for the override or the termination of the override. Further instructions and screenshots can be found in the [User Manual](#).

## HELP AND REPORTING ISSUES

All questions and issues encountered in the portal should be directed to the MHDO Help Desk.

Toll-free Phone: (866) 451-5876

Email: [mhdohelp@hsri.org](mailto:mhdohelp@hsri.org)

**Do not reply to [portal@mhdo.maine.gov](mailto:portal@mhdo.maine.gov) because it is an unmonitored address.**