

Asking questions and checking notifications

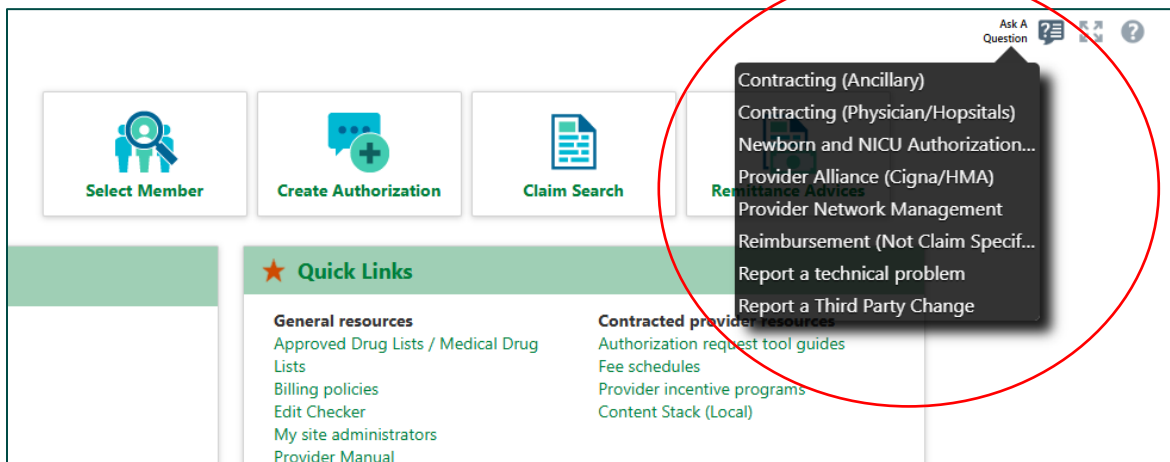
Provider Portal user guide

Asking questions.....	1
Viewing and sorting CRMs.....	2
Responding to a CRM.....	3
Checking your In Basket messages.....	3
Configuring your notification settings.....	5

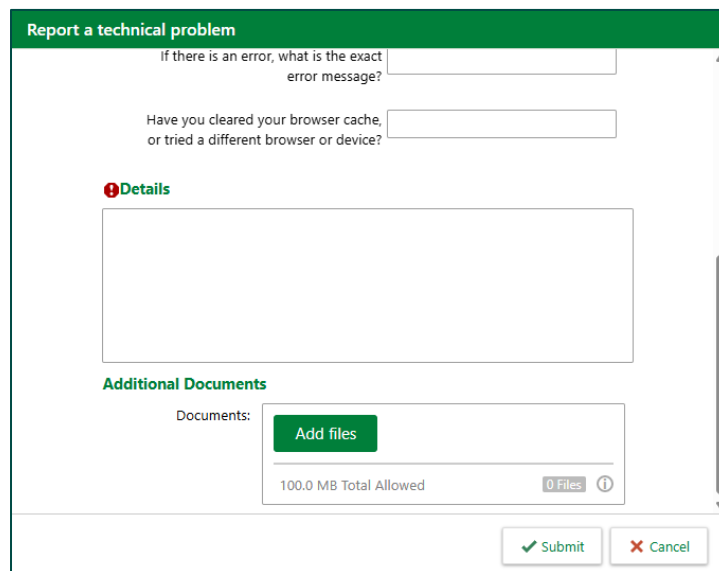
The Provider Portal offers a great point of contact between you and Priority Health, including through the **Ask A Question** dropdown menus, the **In Basket** and Customer Relationship Management cases, or **CRMs**.

Asking questions

A number of pages on the Provider Portal have **Ask A Question** dropdown menus, such as this one on the portal home screen.



Selecting one of these options opens a pop-up that allows you to message Priority Health. Your inquiry will be directed to the appropriate team depending on the topic you choose, once you click **Submit**.

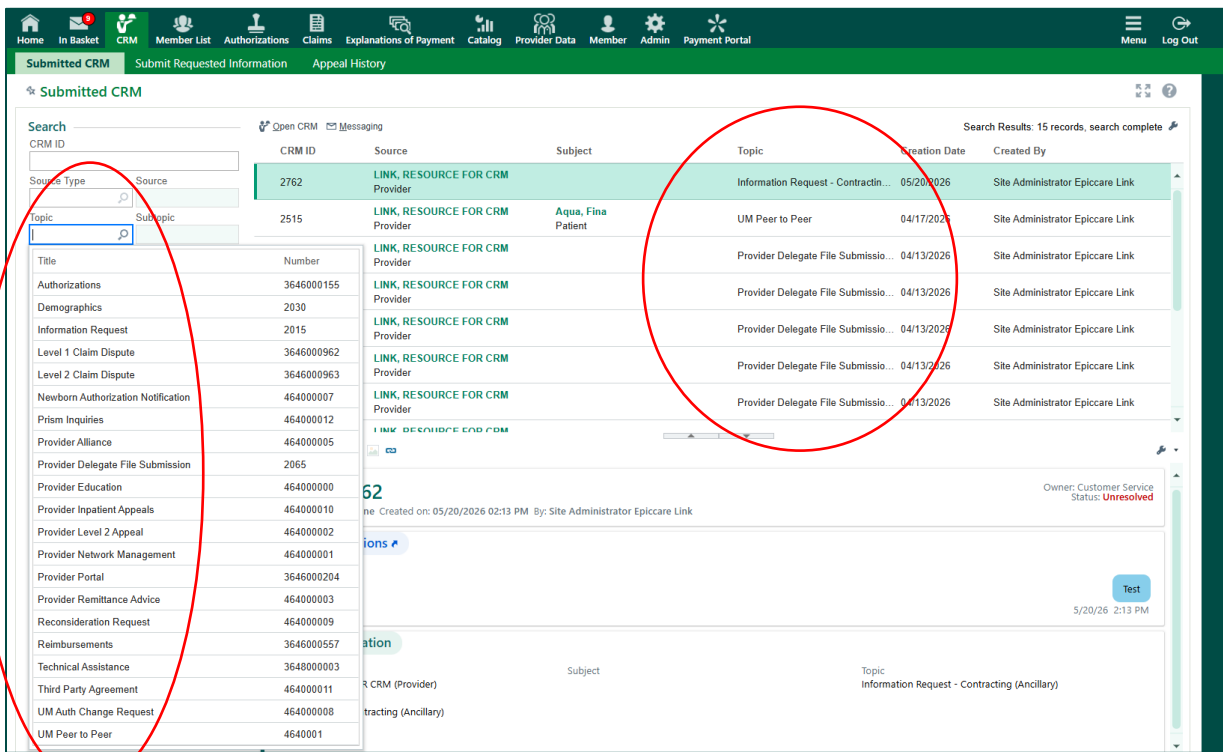
A screenshot of the 'Report a technical problem' form. The form has a green header with the title 'Report a technical problem'. Below the header, there are two text input fields: 'If there is an error, what is the exact error message?' and 'Have you cleared your browser cache, or tried a different browser or device?'. Below these fields is a section titled 'Details' with a large text area for additional information. Below the 'Details' section is a section titled 'Additional Documents' with a 'Documents:' label and an 'Add files' button. Below the 'Add files' button, it says '100.0 MB Total Allowed' and '0 Files'. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'.

Viewing and sorting CRMs

CRMs are inquiries and issues that originate from a few different places:

- Questions asked via **Ask A Question**
- Claim disputes
- Authorization issues, including change, extension, reconsideration and peer-to-peer requests
- Items initiated by Priority Health

You can view all your CRMs by choosing **CRM** in the top navigation bar. If you have a large number of CRMs, sort through them using the **Search** function. For instance, if you want to search by CRM topic, click the magnifying glass icon in the **Topic** field to bring up the available options.



The screenshot shows the CRM interface with a search dropdown menu open. The dropdown menu lists various CRM topics, including:

- Authorizations
- Demographics
- Information Request
- Level 1 Claim Dispute
- Level 2 Claim Dispute
- Newborn Authorization Notification
- Prism Inquiries
- Provider Alliance
- Provider Delegate File Submission
- Provider Education
- Provider Inpatient Appeals
- Provider Level 2 Appeal
- Provider Network Management
- Provider Portal
- Provider Remittance Advice
- Reconsideration Request
- Reimbursements
- Technical Assistance
- Third Party Agreement
- UM Auth Change Request
- UM Peer to Peer

The main table displays a list of CRMs with columns: CRM ID, Source, Subject, Topic, Creation Date, and Created By. The first row is highlighted in green, indicating it is selected.

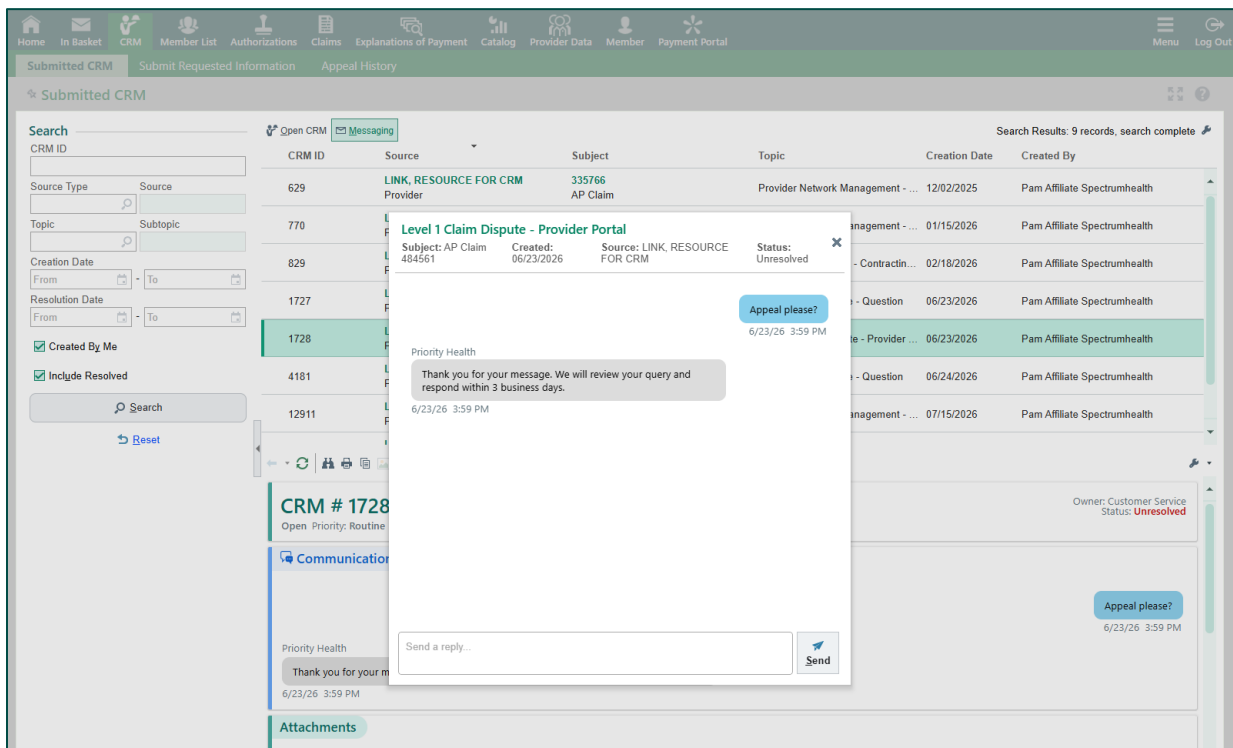
CRM ID	Source	Subject	Topic	Creation Date	Created By
2762	LINK, RESOURCE FOR CRM Provider		Information Request - Contractin...	05/20/2026	Site Administrator Epiccare Link
2515	LINK, RESOURCE FOR CRM Provider	Aqua, Fina Patient	UM Peer to Peer	04/17/2026	Site Administrator Epiccare Link
	LINK, RESOURCE FOR CRM Provider		Provider Delegate File Submissio...	04/13/2026	Site Administrator Epiccare Link
	LINK, RESOURCE FOR CRM Provider		Provider Delegate File Submissio...	04/13/2026	Site Administrator Epiccare Link
	LINK, RESOURCE FOR CRM Provider		Provider Delegate File Submissio...	04/13/2026	Site Administrator Epiccare Link
	LINK, RESOURCE FOR CRM Provider		Provider Delegate File Submissio...	04/13/2026	Site Administrator Epiccare Link
	LINK, RESOURCE FOR CRM Provider		Provider Delegate File Submissio...	04/13/2026	Site Administrator Epiccare Link

With a CRM selected (highlighted in green), details will show up at the bottom of the screen.

Responding to a CRM

CRMs are a case that needs to be worked through in partnership between a provider/group and Priority Health, so it's important that you're able to add your input. Respond to a CRM by selecting one and clicking the **Messaging** button. A window will then pop up with all of your and Priority Health's prior messages.

Enter your message in the **Send a reply** box and then click **Send**.



The screenshot shows the Provider Portal interface. At the top, there's a navigation bar with icons for Home, In Basket, CRM, Member List, Authorizations, Claims, Explanations of Payment, Catalog, Provider Data, Member, and Payment Portal. Below this is a sub-header with 'Submitted CRM', 'Submit Requested Information', and 'Appeal History'. The main area displays a table of CRM records. A modal window titled 'Level 1 Claim Dispute - Provider Portal' is open, showing a conversation history. The conversation includes a message from Priority Health: 'Thank you for your message. We will review your query and respond within 3 business days.' Below the history is a 'Send a reply...' text box and a 'Send' button. The background table lists CRM records with columns for CRM ID, Source, Subject, Topic, Creation Date, and Created By. CRM # 1728 is highlighted.

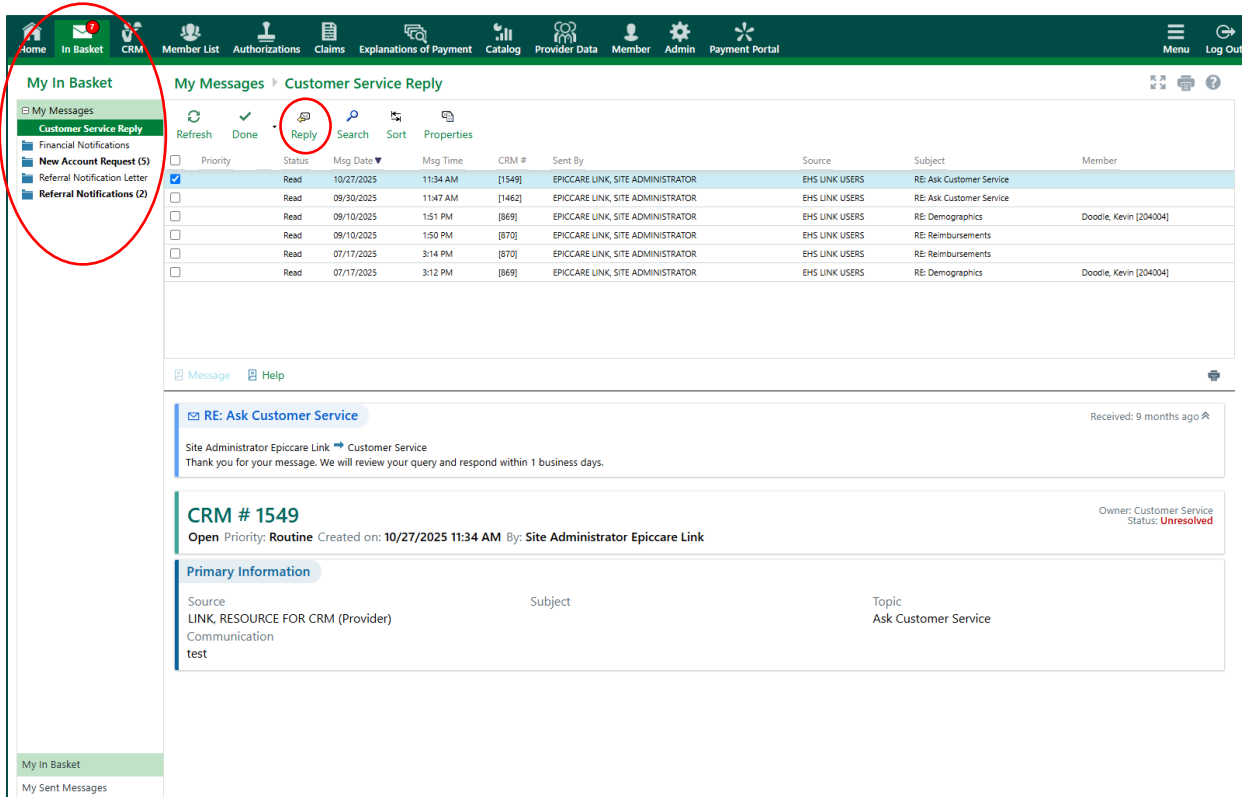
CRM ID	Source	Subject	Topic	Creation Date	Created By
629	LINK, RESOURCE FOR CRM Provider	335766 AP Claim	Provider Network Management - ...	12/02/2025	Pam Affiliate Spectrumhealth
770				01/15/2026	Pam Affiliate Spectrumhealth
829				02/18/2026	Pam Affiliate Spectrumhealth
1727				06/23/2026	Pam Affiliate Spectrumhealth
1728				06/23/2026	Pam Affiliate Spectrumhealth
4181				06/24/2026	Pam Affiliate Spectrumhealth
12911				07/15/2026	Pam Affiliate Spectrumhealth

The Priority Health team you're working on the issue/inquiry with will be notified of your response.

Checking your In Basket messages

In Basket is like the inbox of your Provider Portal. Messages are pre-sorted into folders by message type.

Select a message to bring up details at the bottom of the screen. Some message types allow you to reply. With the message you want to reply to highlighted, click the **Reply** button.



The screenshot shows the Provider Portal interface. On the left, the 'My In Basket' sidebar is visible, containing links to 'My Messages', 'Customer Service Reply', 'Financial Notifications', 'New Account Request (5)', 'Referral Notification Letter', and 'Referral Notifications (2)'. The main area displays a list of messages under the 'Customer Service Reply' tab. The 'Search' button in the message list is circled in red. Below the message list, there is a section for 'CRM # 1549' with details about the message and its status.

To search your In Basket messages, select **Search** and then, in the pop-up window, check the boxes of message types, statuses, dates, etc. that you want to find. You can also search for all messages related to a specific member by using the **Member** search field.

A 'Search Results' folder will be created and the resulting messages will be listed in the individual message type subfolders. Sent messages are excluded from the search.

Member

In Baskets ☒ All

☒ My In Basket

Message Types ☐ All

☒ Broadcast Message
☐ Customer Service Reply
☐ Financial Notifications
☐ New Account Request
☒ Referral Notification Letter
☐ Referral Notifications

Statuses ☐ All

☒ New
☐ Read
☐ Pend
☐ Postpone
☐ Done

Message Recipients ☒ All

☒ Ehs Link Users Pool
☒ Link Site Maintenance Site Administrators
☒ Site Administrator Epiccare Link

Priorities ☒ All

☒ High
☒ Routine
☒ Low

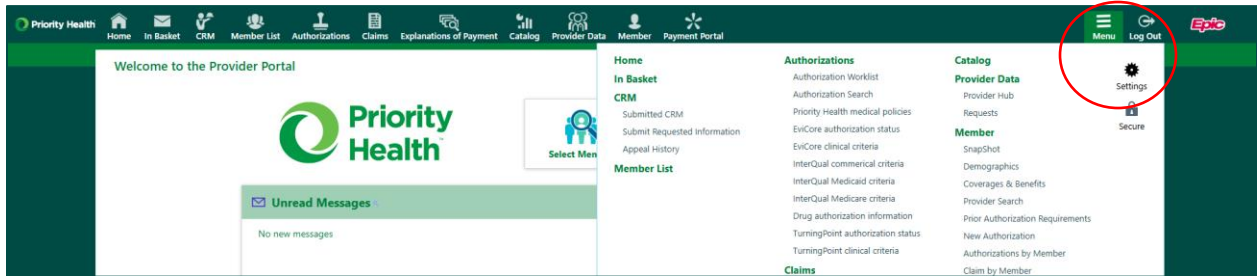
Date Message Received ☐ Include future dates

☒ From to

☐ Search days back, starting days ago

Configuring your notification settings

Navigate to your **Settings** to control which messages you receive and how you're notified.



Select **Notification Preferences** to choose how you're notified about Provider Portal happenings via email and text. Note: when a box is checked, you will still also receive notifications inside the Provider Portal.

Receive notifications for:

Staff Message	☒ Email	☐ Text
CRM	☒ Email	☐ Text
Customer Service Reply	☒ Email	☐ Text
Referral Message	☒ Email	☐ Text
Premium Billing Invoice Received(Financial Notifications)	☐ Email	☐ Text
Broadcast Message	☐ Email	☐ Text
Referral Notifications		
Referral Authorized	☐ Email	☐ Text
Referral Denied	☐ Email	☐ Text
Referral Appointment Scheduled	☐ Email	☐ Text
Referral Appointment Canceled	☐ Email	☐ Text
Referral Appointment No-Show	☐ Email	☐ Text
Referral Created	☐ Email	☐ Text
Referral Note Added	☒ Email	☐ Text

Receiving email notifications for

5 message types

at this email address

Receiving text notifications for

0 message types

at this phone number



Remember that "referral" here means "authorization".

Select **Event Settings** to choose which events you receive **In Basket** notifications for. Use this to control your In Basket flow.

Use the **Relationship Filter** to choose which sites you receive messages about. **Only associations that I select** allows you to choose some of your sites.

In Basket Settings allows you to control access to your messages within your groups (which users can access messages).

Settings > Event Settings

Event Filter

Select which types of events you want to receive notifications about. Note that you might not be notified about sensitive events due to privacy concerns.

Financial Notifications

☐ Capitation Explanation of Payment Received ☐ Invoice Received ☒ PH COMMISSION STATEMENT RECEIVED ☒ Remittance Advice Received

New Patient Notifications

☐ New Patient Access

Referral Notifications

☐ Referral Appointment Canceled ☐ Referral Appointment No Show ☐ Referral Appointment Scheduled ☒ Referral Authorized ☐ Referral Created

☒ Referral Denied ☒ Referral Note Added

Relationship Filter ⓘ

Notify me for:

☐ All events for patients in my group ☒ Only events associated with my group (recommended) ☐ Only associations that I select

In Basket Settings

Allow my messages to be handled by:

☐ Only me ☒ Any user in my group

Finally, select **Roles and Specialties** to control which targeted messages you receive. There is *no limit* to the number of staff roles or specialties you can select.

Use the magnifying glass icon to see the full list of options for each.

ims Explanations of Payment Catalog Provider Data Member Payment Portal

Staff Roles and Staff Specialties for Broadcast Messages

Staff Roles and Staff Specialties can be used to route Broadcast Messages to you. Enter the values for which you want to receive messages.

Staff Roles

Billing & Coding

Remittance Review

Accept

Staff Specialties

Title

Number

Acupuncture248

Addiction Medicine45

Adolescent Medicine72

Adult Congenital Heart Disease245

Advanced Heart Failure and Transplant Cardiology230

Aerospace Medicine142

Allergy1

Allergy and Immunology141

Alternative Medicine73

Ambulatory Surgical Center338

Anesthesiology2

Audiology3

Bariatrics74

Behavior Analyst249