Provider Portal Release Notes
April 2023

Overview

The Provider Portal is an information system developed by CalOptima Health. It grants authorized provider office users access to electronic protected health information (PHI) to carry out payment and health care operations for the benefit of CalOptima Health's members.

Beginning April 4, 2023, Provider Portal users have the ability to:

1. [Download the Medi-Cal Annual Wellness Visit Attestation.](#)
2. [Upload a completed Medi-Cal Annual Wellness Visit Attestation, including supporting documents.](#)
3. [View uploaded Medi-Cal Annual Wellness Visit Attestation and supporting documents for the past two years.](#)

Please follow the instructions below to access these new features. If you are unable to access these features, please contact your office administrator to make sure you have permission to use the corresponding module. It may be necessary to log out and log back in if your permission settings were recently changed. Please also refresh your browser by clicking F5.
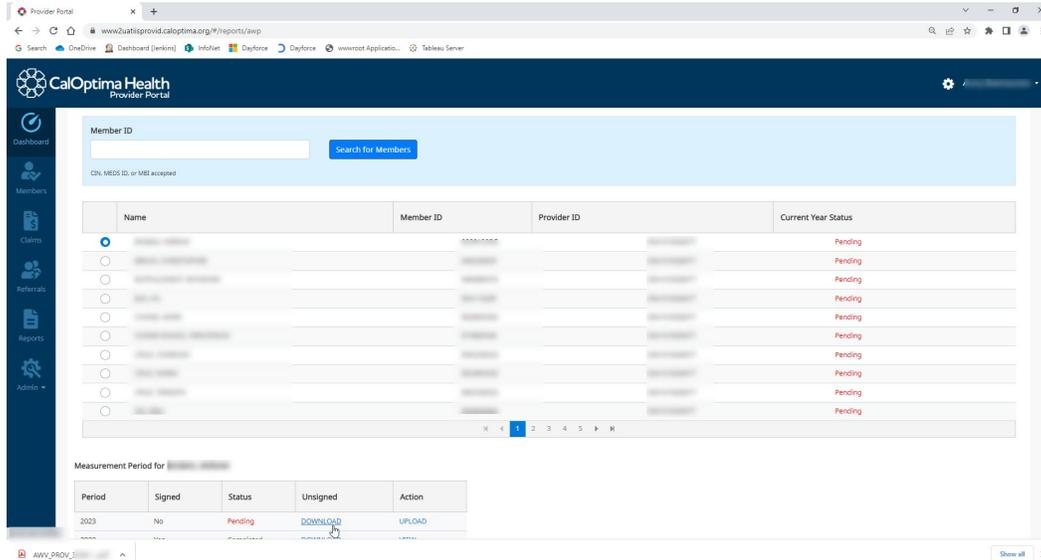
Medi-Cal Annual Wellness Visit Attestation

As part of CalOptima Health's Annual Wellness Visit Program, **local office administrators** and users with the role designated as **PCP** may now download, upload and manage the required attestation form using the Provider Portal.

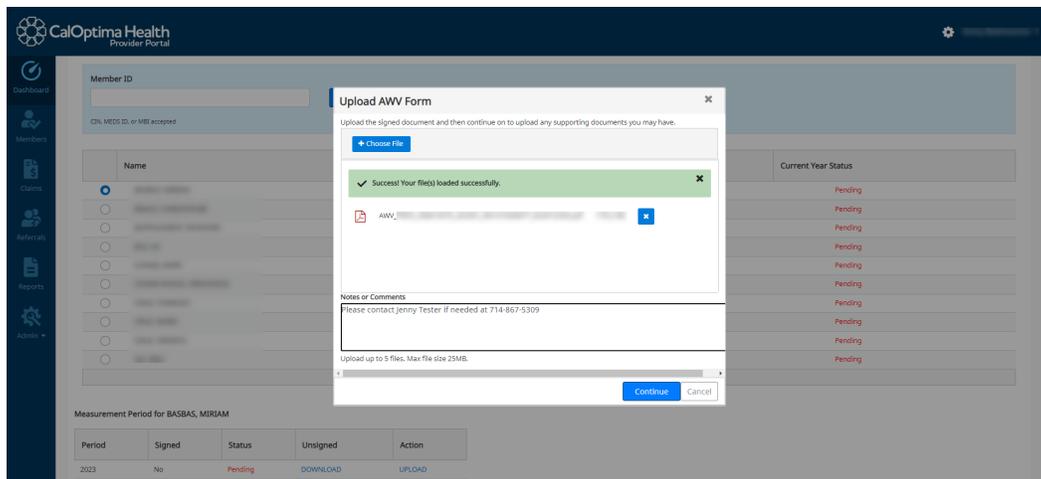## To download the Medi-Cal Annual Wellness Visit Attestation Form

1. Go to **provider.caloptima.org**.
2. Enter your username and password to **login**.
3. On the left-hand navigator, click **Reports**.
4. Under Report Type, select **Medi-Cal Annual Wellness Visit**.
5. Select the radio button next to the corresponding provider record for whom the attestation is to be completed.

6. Select the radio button next to the member record for whom the attestation is to be completed.
7. Click **Download** for the corresponding measurement period.

Note: You may only download the Medi-Cal Annual Wellness Visit Attestation Form if it is not in Completed status.

To upload the Medi-Cal Annual Wellness Visit Attestation Form

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1. From **Reports** > **Medi-Cal Annual Wellness Visit,** select the radio button next to the corresponding provider record for whom the attestation is to be completed.
2. Select the radio button next to the member record for whom the attestation is to be completed.
3. Click **Upload** for the corresponding measurement period.
4. Follow the file upload prompt to attach a file from your local directory.
5. Click **Continue**.
6. Follow the file upload prompt to attach up to five supporting documents from your local directory.
7. Click **Submit**.

To view your Medi-Cal Annual Wellness Visit Attestation submission
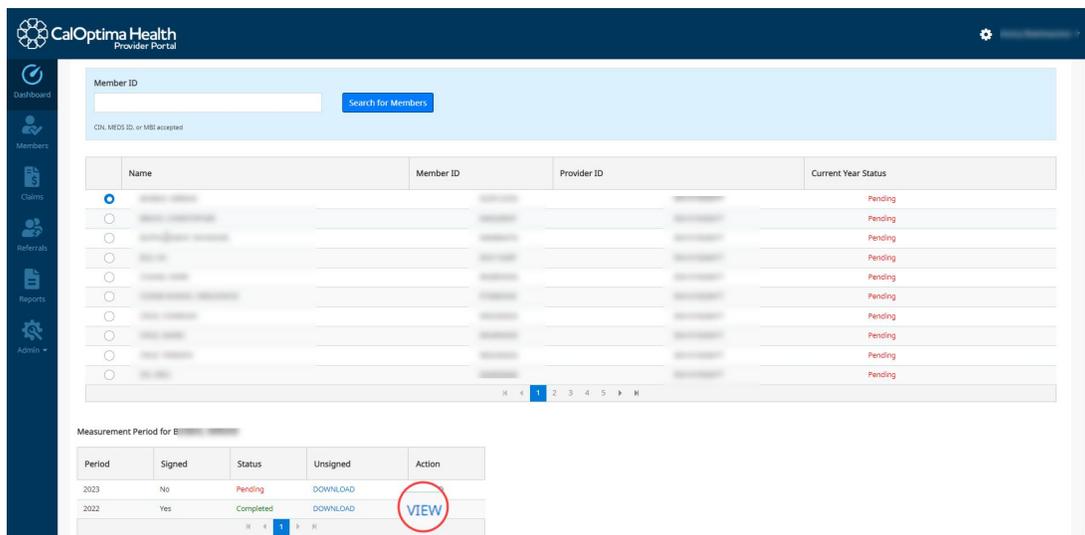
1. From **Reports** > **Medi-Cal Annual Wellness Visit,** select the radio button next to the corresponding provider record for the attestation you wish to view.
2. Select the radio button next to the member record for the attestation you wish to view.
3. Click **View** for the corresponding measurement period.

To Grant User Access to Annual Wellness Visit Attestation Forms
1. Login as a local office administrator.
2. Go to **Admin** > **Verify Users** > click the **Edit** icon for corresponding user.
3. If the user is already a local office administrator role:

      a. Simply click the checkbox next to **View Reports** and click **Next** to save.

      b. If **View Reports** is already checked, no change is necessary.

4. If the user is already a PCP role, you do not need to change their role. They will already have access to **View Reports**.

5. If the user role needs to be changed, click on the new User Role. Then, click the checkbox next to **View Reports** if it is not already checked. Then, click **Next** to Save.

For Local Office Administrators, to Update Your User Permissions Without Changing Your User Role

1. Login as a local office administrator.

2. Go to **Admin** > **Verify Users** > click the **Edit** icon for the corresponding user.

3. If the user is already in a local office administrator role:

      a. Simply click the checkbox next to **Security Setting (e.g., View Reports)** required and click **Next** to save.

      b. If **Security Setting (e.g., View Reports)** is already checked, no change is necessary.