



PROVIDER ACCOUNT

PROVIDER SELF-SERVICE (PSS)

USER GUIDE

Table of Contents

ABOUT THE PROVIDER ACCOUNT PORTAL	3
About the Provider Account Interface	3
User Profile.....	4
TFO Alerts.....	4
Secure Messages	4
Create and Send New Messages	4
Access and Reply to Messages	5
Archive and Unarchive Messages	6
PROVIDER DOCUMENTS	8
Documents.....	8
Upload New Documents	8
Filter Document List	9
Open and View a Document.....	10
Download a Document.....	11
Print a Document.....	11
Eligibility & Claims.....	12
HEALTH CLAIMS	14
H&W Claims Filters	15
Viewing an EOB.....	15

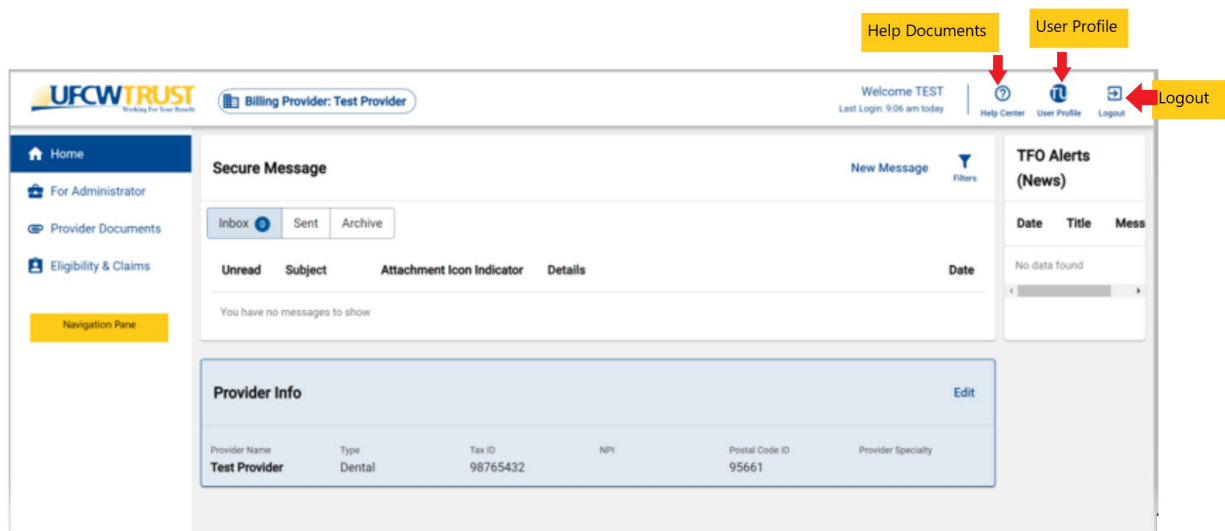
About the Provider Account Portal

The Provider Account is a provider self-service (PSS) portal for Providers to view Member/Dependent eligibility, view/print EOBs, and, if a dental Provider, create Dental Eligibility Inquiries. Providers are also able to share information with the Fund Office using secure messaging and document upload features.

About the Provider Account Interface

When you sign into the Provider Account portal, you will be presented with the user interface. The exact options displayed and available features depend on your account permissions (e.g., Administrator account or regular account).

An example of the interface is shown in the image below.



Tabs	
Navigation Pane	Use the navigation pane to access a specific tab.
Tabs	The active tab is highlighted in blue.
User Profile	The User Profile provides the option to change your username, security questions, and more.
Logout	Closes the application and returns you to the Login screen.

User Profile

The User Profile option available from the top of the user interface allows you to change your user profile, such as: username, password, and security questions.

TFO Alerts

The TFO Alerts or “**News**” section displays messages from the Trust Fund Office (TFO), also known as UFCW & Employers Trust, LLC, or TotalTrust, LLC, to all Providers about special announcements, upcoming events, and benefit changes.

TFO Alerts (News)		
Date	Title	Message
No data found		

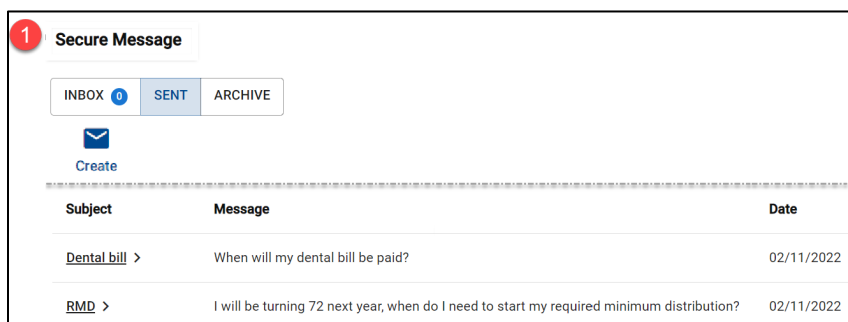
Secure Messages

The Secure Message option provides you with the ability to send secure messages to and receive secure messages from the TFO. Once sent, your message is displayed in the Sent folder, and replies from the TFO will be visible in the Inbox. Once satisfied, you have the option to move messages to the Archive folder.

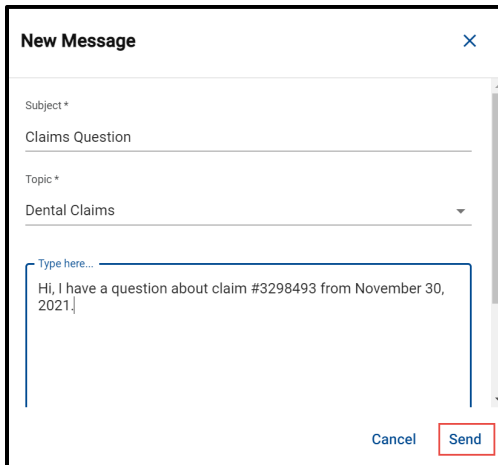
Create and Send New Messages

To create and send a new secure message to the TFO:

1. Click the **Create** icon below the “Inbox” label.



The New Message popup window is displayed.



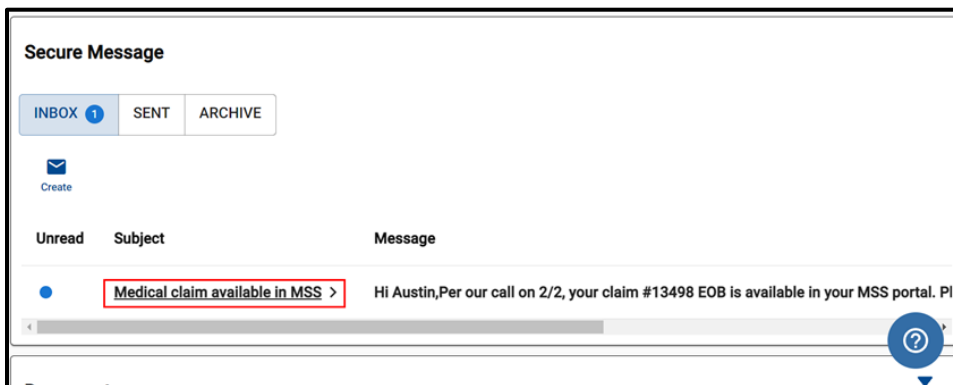
2. In the **Subject** field, enter a short description of what the message is about.
3. Click in the **Topic** field and select the topic that best describes the reason for the message. Select from:
 - Active Member Eligibility
 - Pension
 - Retiree Member Eligibility
 - Dental Claims
 - Prescriptions
 - Sick Leave
 - General Support
 - Registration
 - Website Related Questions or Errors
 - Medical Claims
 - Registration or Login Issues
4. Click in the **Type here...** box, and type in your message.
5. Click **Send**.

When you return to the Secure Message window, you can click the **Sent** tab to see your message. Replies will go to your Inbox.

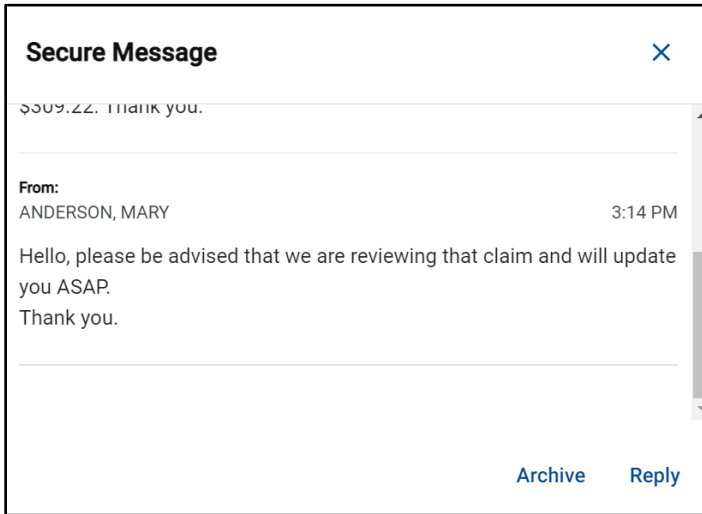
Access and Reply to Messages

To access and reply to a secure message:

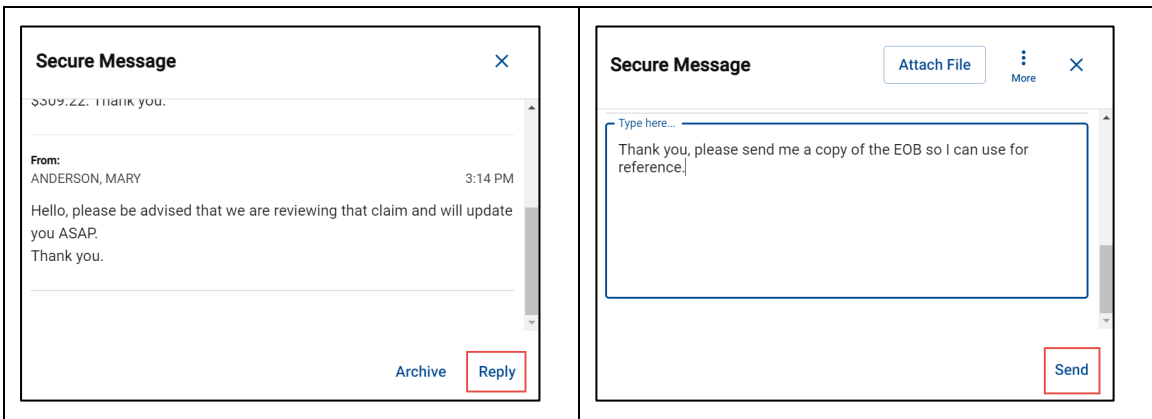
1. Click the **Inbox** tab.
2. Locate the item you want to view, then click on the link (underlined text) in the **Subject** column.



The Secure Message popup window displays the full message.



3. To reply to the secure message, click **Reply**.



4. A new text field displays in the popup window. Enter your reply.
5. Click **Send**.

Archive and Unarchive Messages

If you have received the information you requested, or have the answers you needed, you can send your messages to the Archive folder. Archived messages can always be retrieved, if needed.

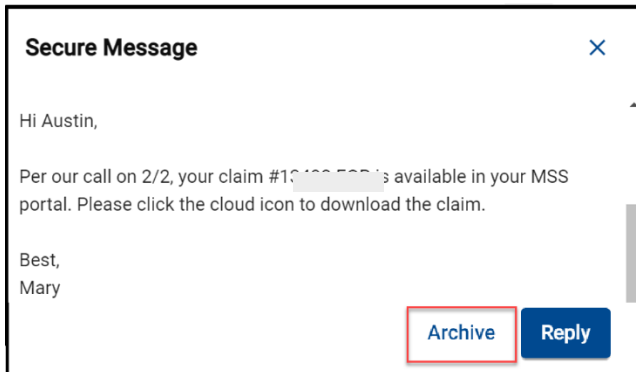
To archive a message:

1. Go to the Inbox or Sent folder to access the appropriate message.
2. In the **Subject** column, click the item you want to archive.

Subject	Message	Date
Medical claim available in MSS >	Hi Austin, Per our call on 2/2, your claim #13498 EOB is available in your MSS portal. Please click th	
Dental bill >	When will my dental bill be paid?	02/11/2022

The message is opened.

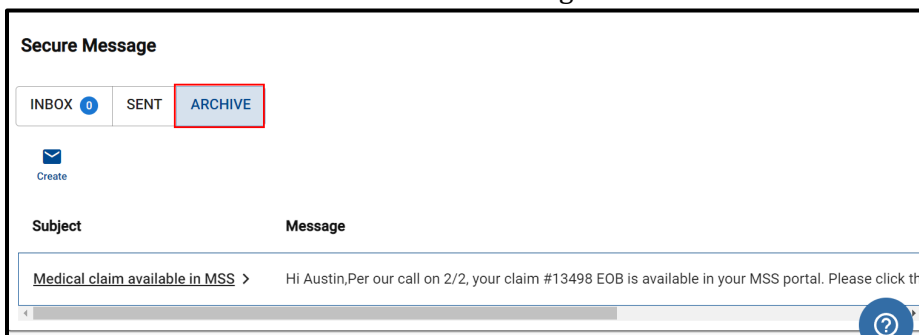
3. Scroll to the bottom of the message, click **Archive**.



The message is moved to the **Archive** folder.

To unarchive a message:

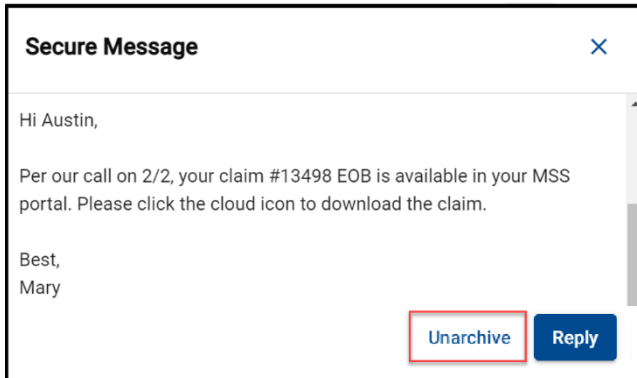
1. Go to the **Archive** folder to access the message.



2. In the **Subject** column, click the item you want to unarchive.

Subject	Message	Date
Medical claim available in MSS >	Hi Austin, Per our call on 2/2, your claim #13498 EOB is available in your MSS portal. Please click th	

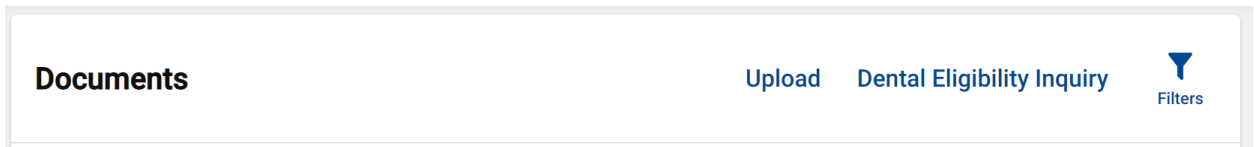
3. At the bottom of the message window, click **Unarchive**.



The message is moved back to the folder where it originated.

Provider Documents

The Provider Documents tab allows you to view created documents, upload documents, and create a Dental Eligibility Inquiry if you are a dental Provider.



Documents

The Documents section provides you the ability to view, download, sort, print, and upload documents. Available documents include the results of Dental Eligibility Inquiries (for Dental Providers), and documents that your office(s) have uploaded to the TFO.

NOTE: The file types allowed for upload are .pdf, .bmp, .gif, .jpeg, .jpg, .png, .tif and .tiff. The maximum file size allowed is 10mb and the time it takes to upload a file will depend on file size.

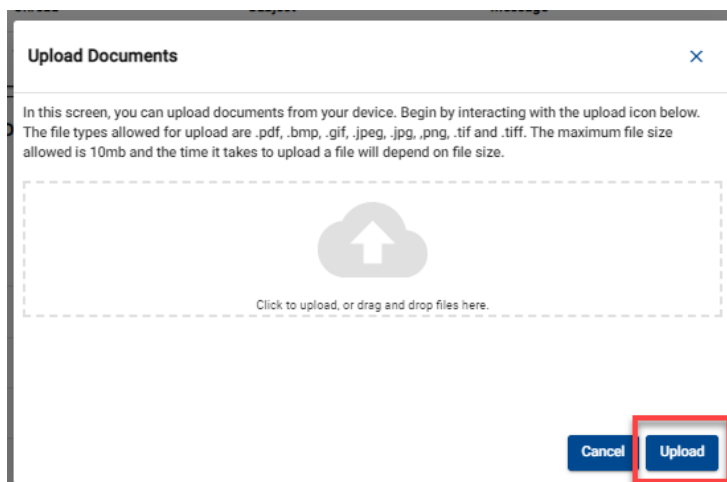
Upload New Documents

To upload a new document:

1. From the Documents section, click the **Upload** icon.



2. The Upload Documents popup window is displayed:



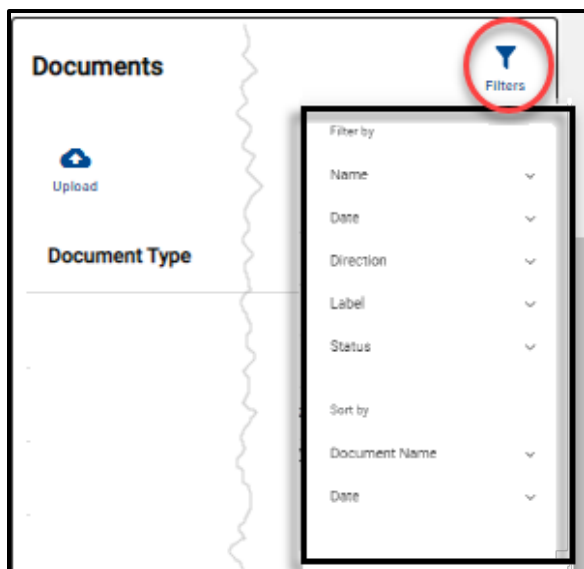
3. Click the **cloud symbol** to select a file from your computer OR **drag and drop** a file from your computer onto the cloud symbol on the screen.
4. Click **Upload**.

Filter Document List

The Filters option allows you to narrow down the documents in the list, by filtering on one or more filter options.

To filter the document list:

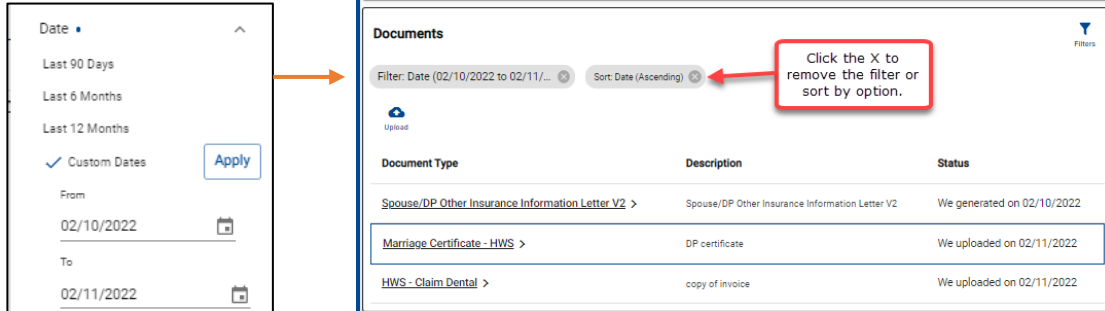
1. From the Documents section, click the **Filters** icon in the upper right corner.



The Filter by / Sort by option is displayed.

2. Select the **Filter by** option (Name, Date, etc.) you want to use to filter the list. You can use more than one filter at once, but you must set them one at a time.

- Under **Sort by**, you can select the item by which you want the list to be sorted. In the example below, we chose to filter by a *custom date* range, and then returned and sorted the list by *ascending date*.



- To remove a filter or sort option, simply click the **X** on the option you want to remove.

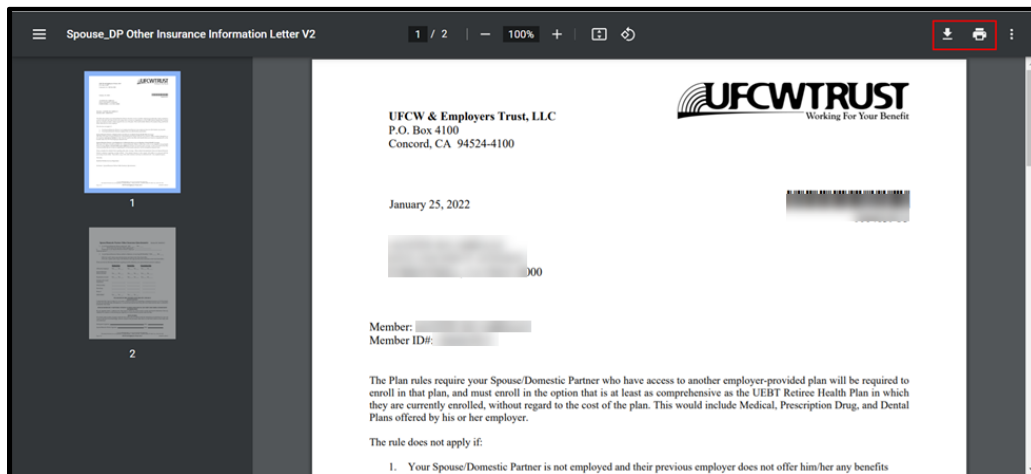
Open and View a Document

To open and view a document:

- Locate the document you want to open, then click the **link** in the **Document Type** column.

Actions	Document Name	Patient Name	Date Created
	Dental Fax Template Standard 13 wHist >		11/15/2022 12:35:08 PM

- By default, the document is opened in a new browser window in PDF format. From here, you can print or download the document. Refer to the sections below for instructions.

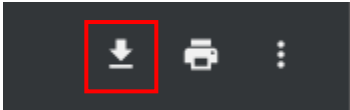


Download a Document

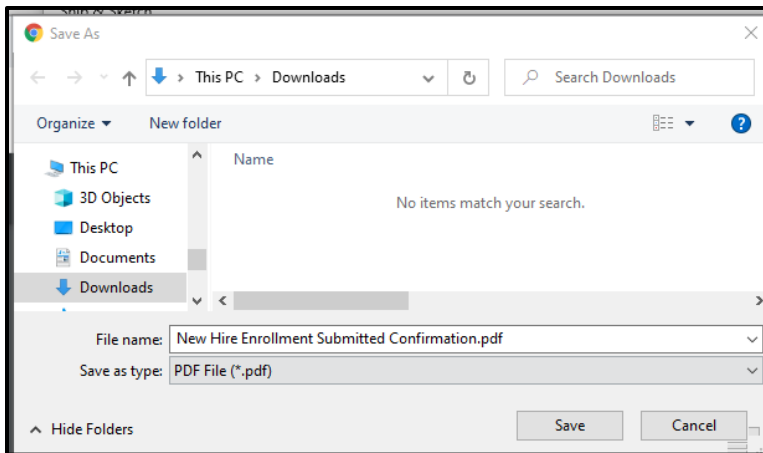
Once you have opened a document, you can choose to download that document (PDF file) to a location on your computer.

To download the document:

1. From the document window, click on the download icon in the top-right corner of the document.



2. The Save As window is opened. Select the **folder** to which you want it saved.
3. Provide a name for the file. Click **Save**.

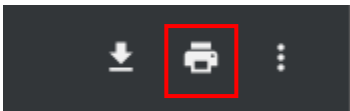


Print a Document

Once you have opened a document, you can choose to send the document to a printer.

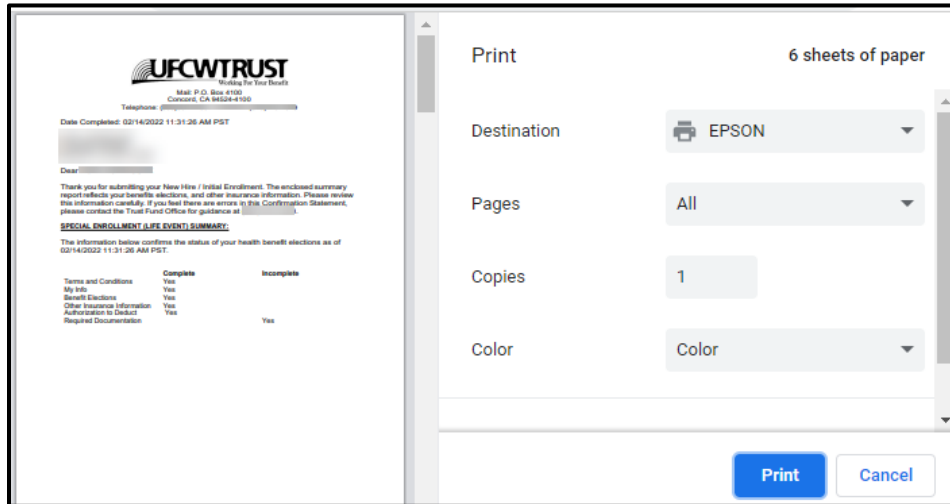
To print the document:

1. From the document window, click on the Print icon in the top-right corner of the document.



The Print Dialog window is opened.

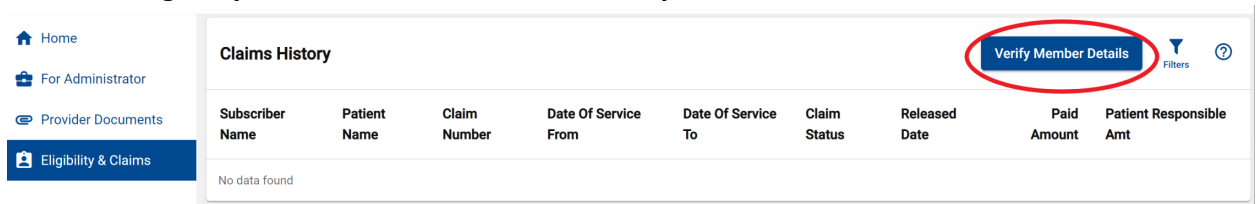
2. Select your **printer**. Click **Print**.



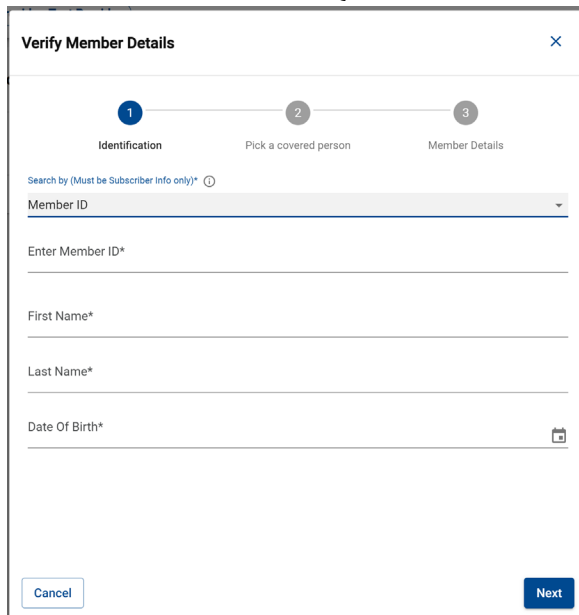
Eligibility & Claims

To view Member eligibility:

1. From the Eligibility and Claims tab, click on the Verify Member Details button.



2. Enter in the **Subscriber's (i.e., the Member's)** information and click Next.



- All covered persons (Member and Dependents) of the Subscriber's (the Member's) Plan are then displayed. Select the Patient and then click Next.

Verify Member Details ×

✓
 Identification

2
 Pick a covered person

3
 Member Details

Please select Member/Dependents to see Eligibility, Carrier, COB details

TOM TESTGUY Member 03/03/1960 1106033U0	JOHN TESTGUY Natural Child 10/22/1987 1104389U4	JOSE TESTGUY Natural Child 01/01/1999 1148889U7
MICHEAL TESTGUY Natural Child 07/26/2006 1104434U6	TINA TESTGUY Natural Child 12/01/2011 1113208U0	WILLIAM TESTGUY Natural Child 03/23/2018 1149126U8
JOSH TEST Natural Child 04/01/2020 1148229U4	DORY TESTGUY Natural Child 05/01/2022 1149134U2	MINNIE TESTGUY Natural Child 05/08/2022 1149126U9
PETUNIA TESTGUY Spouse 12/25/1964 1104511U1		

Cancel
Previous
Next

- Current eligibility will be displayed for the selected Patient.

Verify Member Details ×

✓
 Identification

✓
 Pick a covered person

3
 Member Details

First Name	Last Name	Relation	Date Of Birth	Member ID
TOM	TESTGUY	Member	03/03/1960	1106033U0

Filters

Eligibility

Start date	Stop date	Fund Name	Plan Name
No data found			

Health Claims

Claims will automatically be shown for received claims from your, the Provider's, TIN.

Claims History

[Verify Member Details](#)



Subscriber Name	Patient Name	Claim Number	Date Of Service From	Date Of Service To	Claim Status	Released Date	Paid Amount	Patient Responsible Amt
-----------------	--------------	--------------	----------------------	--------------------	--------------	---------------	-------------	-------------------------

Field Name	Definition
Subscriber Name	This is the name of the Member, who has enrolled the Patient covered by the claim.
Patient Name	This is the name of the Patient for the claim.
Claim Number	Number assigned to this claim. Adjusted Claims will have -xx (i.e., -01, -02, etc.) appended to the original Claim Number.
Date of Service from	The start date of service for the claim.
Date of Service To	The end date of service for the claim.
Claim Status	The current status of the claim.
Release Date	Date claim was released.
Paid Amount	The total dollar amount being paid by the Plan.
Patient Responsible Amt	The total dollar amount not covered by the Plan and required to be paid by the Member.

H&W Claims Filters

Search by

Filter by

- Claim Status ▼
- Claim Number ▼
- Patient First Name ▼
- Patient Last Name ▼
- Insured ID/ SSN ▼
- Date of Service ▼

Filter Name	Definition
Claim Status	Claims can be filtered by status type.
Claim Number	Claims can be filtered by Claim Number.
Patient First Name	Claims can be filtered by patient's first name.
Patient Last Name	Claims can be filtered by patient's last name.
Insured ID/SSN	Claims can be filtered by Member ID or SSN
Date of Service	Claims can be filtered by Claim Date <ul style="list-style-type: none"> • Last 90 Days • Last 6 Months • Last 12 Months • Custom Dates

Viewing an EOB

To view an H&W (Health & Welfare) claim:

1. Click the **cloud icon**  to view or print the claim EOB.