



Providers

User Guide

© 2024 TELUS Health Solutions Inc.

TELUS Health Solutions Inc. is a registered trademark of TELUS Corporation and is used under license. All other trademarks are the property of their respective owners.

Release: r1 V2

Release Date: 27/11/2024

Proprietary Notice

Copyright © 2006-2024 TELUS Health Solutions Inc.

All rights reserved. Information provided in this publication is proprietary and confidential. No part of this publication may be distributed, reproduced, stored in a retrieval system, or transmitted, in any form or by any means (electronic, mechanical, recording, or otherwise) without the express written permission of TELUS Health Solutions Inc.

DISCLAIMER

This publication, as well as the software described in it, is furnished under license and may only be used or copied in accordance with the terms of such license. TELUS Health Solutions Inc. makes no representation or warranties with respect to the contents of this publication, and specifically disclaims any express or limited warranties which may result from misuse of the software and failure to comply with the procedures and/or operating instructions provided herein.

Furthermore, TELUS Health Solutions Inc. reserves the right to make changes to the software and any part of this publication at any time, without obligation to notify any person or entity of such changes.

REVISIONS

The information contained in this publication is subject to change without notice and does not represent a commitment on the part of TELUS Health Solutions Inc. Changes to this publication will be made, as required, to ensure that the contained data reflects the latest configuration of the software, procedures and/or operating instructions. These changes may be the result of design improvements and/or customer requests.

Every effort will be made to inform users of these changes as soon as possible, provided that the changes affect the performance and operation of the software.

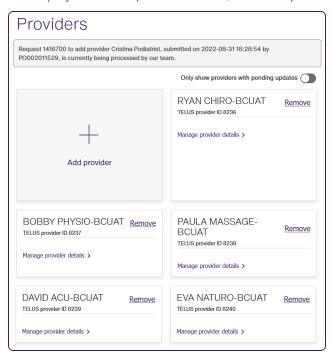
Table of Contents

Table of Contents	3
Providers	4
TELUS Provider ID	6
Managing provider details	7
Linking providers	. 1
Linking hierarchy	1
Adding providers	. 12
Removing a provider	.17
Unlinking from an organization (provider)	18



Providers

The **Providers** window lists the providers that are linked to your organization. Pending provider requests are displayed at the top of the window, and each provider is displayed in a separate card.



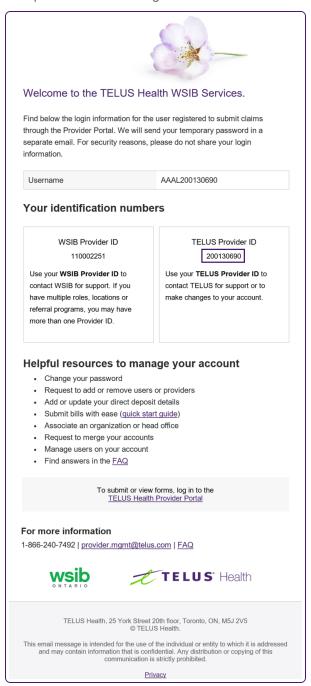
The following table describes the tasks you can complete from this window.

For information on	See
Linking a provider with your organization	"Adding providers" (page 12)
Removing an existing provider link	"Removing a provider"

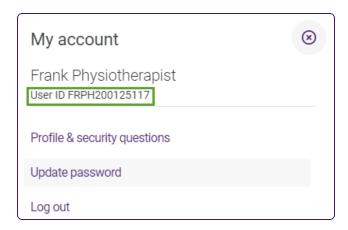
For information on	See
	(page 17)
Updating an existing provider's name, TELUS provider ID, and effective date, as well as their roles and licenses.	"Managing provider details" (page 7)

TELUS Provider ID

Your TELUS and WSIB Provider IDs were supplied in your welcome package. Only the TELUS Provider ID is required to use the Merge function.



If you no longer have the email that TELUS Health sent you after you registered for the service, you can also find your TELUS Provider ID on the **My Account** page.

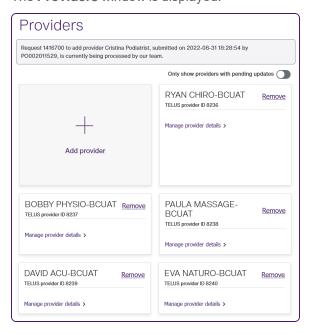


Managing provider details

All changes to providers, with the exception of role removals, are reviewed by the TELUS Health team before they are implemented in the Provider portal.

1. From the Provider Portal, select the Menu button, then select **Providers**.

The **Providers** window is displayed.



2. Select the **Manage provider details** link beneath the name of the provider whose information you want to modify.

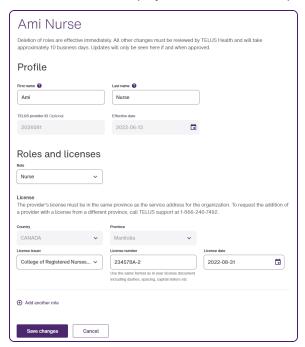


To display only those providers whose additions are pending approval, select the right side of the **Only show providers with pending updates** toggle:

Only show providers with pending updates



The window that is displayed is named after the provider you selected.





The **Role** field associated with an approved role is disabled, as you cannot select a different role once a role has been approved. You also cannot change the **Province**, which must match the province in which the organization is located.

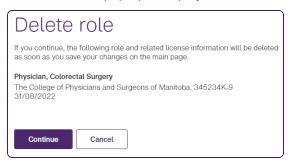
3. Optionally update the provider's **First name** and **Last name**.

4. To delete a role:

Select the Delete button to its right.

This button is displayed if the role has not yet been approved, or it has been approved but there is more than one role. At least one role must be associated with each provider.

■ The **Delete role** pop-up is displayed:



Select Continue.

9

- 5. To add a role, select **Add another role**, then complete steps 6 to 10 of "Adding providers" (page 12).
- 6. To delete a role, select the Delete button to the right of the applicable Role field.

The button is displayed adjacent to unapproved roles, and approved roles if there are at least two approved roles (in which case you can delete one but not both of the approved roles).

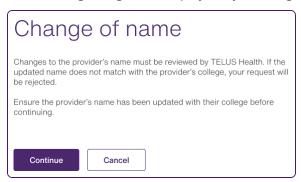
If you are deleting an unapproved role, the role is removed immediately.

If you are deleting an approved role, you must confirm your deletion from the confirmation box that is displayed.

Each approved provider must always have at least one license that has been reviewed and approved. To delete the only remaining license that is reviewed and approved, first add a new license, wait for it to be reviewed and approved, and then delete the other license.

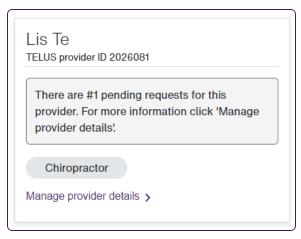
7. Select Save changes.

The following dialog box is displayed if you changed the provider's first or last name:



Select Continue, then Save changes.

The **Providers** window is displayed again. A message is displayed on the provider's card indicating that pending changes have been submitted.





Linking providers

As a user registered to provide eClaims online billing, you can link licensed providers to an organization. You must belong to an organization that requires providers to be linked. If your organization has one of the following roles, you can link providers:

- Clinic
- Optical supplier

Linking hierarchy

The linking hierarchy captures provider relationships in which:

- Organizations with specified roles must be linked to at least one licensed provider and may be associated to many.
- A licensed provider may be linked to organizations which have specified roles.

For example, a Medical Centre is an organization that may have two linked providers: a physiotherapist and a kinesiologist.

Providers can be linked with zero or more organizations. Organizations can request links to providers, and remove existing links to providers. Providers can unlink from organizations.



Adding providers

New provider records are reviewed by the TELUS Health team before they become available in the Provider portal.



To display only those providers whose additions are pending approval, select the right side of the **Only show providers with pending updates** toggle:

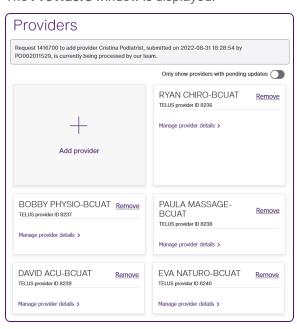
Only show providers with pending updates



13

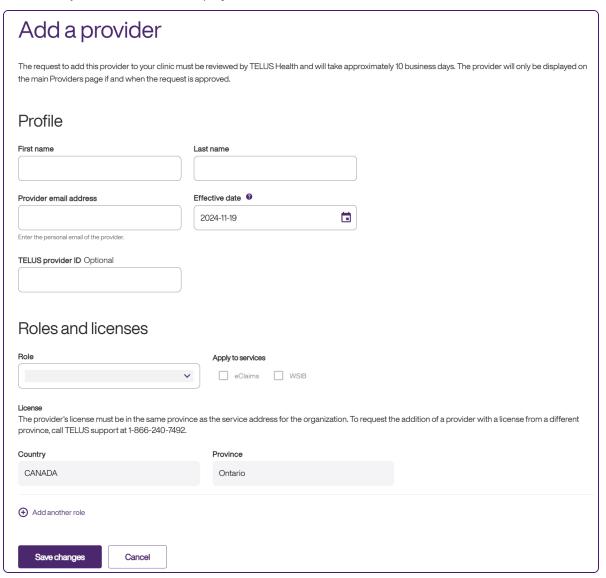
1. From the Provider Portal, select the Menu button, then select **Providers**.

The **Providers** window is displayed.



2. Select Add provider.

The Add a provider window is displayed.



- 3. Enter the provider's **First name** and **Last name**.
- 4. Enter the provider's personal email address in the **Provider email address** field.

The provider's email address must not be the same as the organization's email address.

- 5. Optionally enter their **TELUS provider ID**.
- 6. Select the Effective date.

15

7. In the Roles and licenses section, select a Role.

Only those role and license combinations that are associated with your organizational role are displayed. For example, if your organization is an Optical Store / Optometry CI, you can add opticians and optometrists. If only one role is available, it is selected.

When you select a role, the **License issuer**, **License number**, and **License date** fields are enabled. The values in the **License issuer** drop-down reflect the selected role and province.

8. If you selected the role of Misc. Practitioner, a **Role Description** field is displayed to the right of the **Role** field. Enter a description of the role.



9. Select the appropriate **License issuer**, enter the **License number**, and select the **License date**.

Only those license issuers that are approved for the applicable service (eClaims or WSIB) for the selected role and province are displayed. For more information, contact your license issuer.

If you selected the role of Misc. Practitioner, or your organization is registered for the WSIB service, the **License issuer** field is a text field, and all of the license fields are optional, but if you provide a value for one of these fields, you must provide a value for all of them.

10. If the **Country** field is enabled, select a country.

This field is enabled if your organization is registered for WSIB services. If the provider has service locations in more than one country, the **Country** field is displayed and enabled. It includes only those countries where the provider's independent practice or linked organizations are located.

11. If the **Province** field is enabled, select a province.

This field is enabled if the provider has multiple work locations and these locations are in two or more provinces, in which case it contains these provinces only. If all of the provider's work locations are in the same province, this field is disabled, and the applicable province is selected. Providers must be licensed in all of the provinces in which they provide services. You can only add one license per province.

If your organization is registered for the WSIB service, and your service address is not in Canada, "/**State/Region**" is appended to the **Province** label, and its values reflect the provinces, states, or regions for the selected country.

If your organization is registered for both eClaims and WSIB services, a message is displayed beneath the license fields to indicate with which service the role and license are associated.

12. To add another role, select **Add another role**, then repeat steps 6 to 10.

If the Misc. Practitioner role is available, you can use it multiple times. All other roles can be used only once per provider.

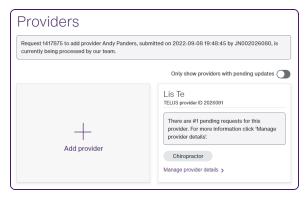
13. To delete a role, select the Delete button to its right.

This button is only displayed if there is more than one role, as at least one role must be associated with each provider.

14. Select Save changes.

The **Providers** window is displayed again.

If the provider you added is an associated provider (that is, a provider who is associated with your location and does not work at any other locations), a note is displayed at the top of this window indicating that the add request is pending.



If the provider you added is an independent provider (that is, a provider who is associated with your organization and also works from one or more personal working locations):

- A note is displayed at the top of the **Providers** window, indicating that you request has been sent to the provider.
- The provider receives an invitation to log into the Provider portal and accept your association request.



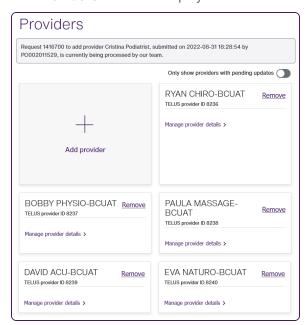
- When the provider logs in, they are asked to confirm the request.
- After the provider accepts the invitation, a note is displayed at the top of your Providers window, indicating that the add request is pending.



Removing a provider

Each organization must have a minimum of one provider associated with it; as such, the Remove link is only displayed within a provider's card if your organization is linked to two or more providers.

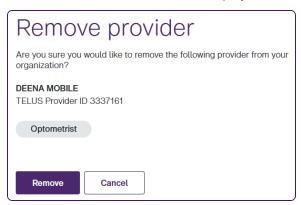
1. From the Provider Portal, select Menu button, then select **Providers**. The **Providers** window is displayed.



Providers User Guide

2. Select the **Remove** link to the right of the provider you want to remove.

The **Remove Provider** window is displayed.



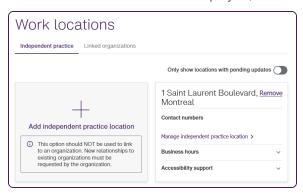
3. Select Remove.

18

The dialog box closes. The selected provider no longer appears on the **Providers** window. When they log into the Provider portal, your organization will no longer appear on their list of organizations that are displayed on the **Linked organizations** tab of the **Work locations** window.

Unlinking from an organization (provider)

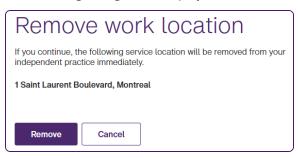
From the Provider Portal, select the Menu button, then select Work locations.
 The Work locations window is displayed, with the Independent practice tab selected.



2. To remove your link to an organization, select the **Linked organizations** tab.

3. Select **Remove** to the right of the location you want to remove.

The following dialog box is displayed:



If this is the only location in which a certain role is used, you can remove the location and the role will continue to exist as an orphan.

4. Select Remove.

The link is immediately removed from the selected organization. The card is removed from the main locations page for this provider. When a user from that organization logs in and goes to the **Providers** page, the applicable provider card is no longer displayed for the organization.



© 2024 TELUS

TELUS is a registered trademark of TELUS Corporation and is used under license. All other trademarks are the property of their respective owners.

