Table of Contents

1 Introduction ............................................................................................................................................ 4
2 Understanding the How to Read the Barcode and Reference Key Feature ............................................ 5
3 Accessing the Provider Portal ................................................................................................................ 6
4 Authenticating the Provider .................................................................................................................... 7
5 Uploading the Medical Records to the Provider Portal......................................................................... 10
   5.1 Uploading Medical Records for Multiple Reference Keys .............................................................. 17
6 Understanding the Post Upload Process .............................................................................................. 19
7 Understanding Post Upload Process for Non RUG and RUG Reference Keys........................................ 21
<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1</td>
<td>User Guide</td>
<td>4</td>
</tr>
<tr>
<td>2-1</td>
<td>Barcode &amp; Reference Key</td>
<td>5</td>
</tr>
<tr>
<td>3-1</td>
<td>Provider Authentication</td>
<td>6</td>
</tr>
<tr>
<td>4-1</td>
<td>Disclaimer Page</td>
<td>9</td>
</tr>
<tr>
<td>5-1</td>
<td>Medical Record Update</td>
<td>10</td>
</tr>
<tr>
<td>5-2</td>
<td>Audit ID for a Reference Key</td>
<td>11</td>
</tr>
<tr>
<td>5-3</td>
<td>Attach PDF Documents</td>
<td>11</td>
</tr>
<tr>
<td>5-4</td>
<td>Attach File – Non-RUG</td>
<td>12</td>
</tr>
<tr>
<td>5-5</td>
<td>Attach File – RUG</td>
<td>12</td>
</tr>
<tr>
<td>5-6</td>
<td>Attached Document</td>
<td>13</td>
</tr>
<tr>
<td>5-7</td>
<td>Upload Successful</td>
<td>16</td>
</tr>
<tr>
<td>5-8</td>
<td>Add Reference Key</td>
<td>17</td>
</tr>
<tr>
<td>5-9</td>
<td>Multiple Reference Key Upload</td>
<td>17</td>
</tr>
<tr>
<td>5-10</td>
<td>Delete Reference Key Section</td>
<td>18</td>
</tr>
<tr>
<td>6-1</td>
<td>Document Received Successfully</td>
<td>19</td>
</tr>
<tr>
<td>6-2</td>
<td>Document process failed due to unidentified reason</td>
<td>20</td>
</tr>
</tbody>
</table>
1 Introduction

The Provider Portal is a web application where Providers can upload the required medical records pertaining to a claim selected for auditing. During the course of conducting clinical audits, SCIO requests medical records from the Providers to validate claims. Providers have the option to submit the required medical records to SCIO's Provider Portal.

This user guide provides instructions to Providers on how to utilize the Provider Portal application to simplify the medical record submission. To access the user guide, click the User Guide link provided at the top right corner of the page as shown in the following screenshot:

![User Guide](image)

*Figure 1-1: User Guide*

The Provider Portal user guide will get downloaded as a PDF file on your computer.
2 Understanding the How to Read the Barcode and Reference Key Feature

The submission process begins after you receive a medical record request letter from SCIO. At the footer section of the Medical Record Request letter you can view the Barcode Image, Barcode ID, and Reference Key as shown in the following screenshot:

- You must upload the required medical records via SCIO’s Provider Portal application. The medical records are required to be uploaded in a PDF format.

- All the medical records uploaded to the Provider Portal application will contain a SCIO barcode on the first page followed by the document. The document will follow one of the two naming conventions:
  - Option 1 (Preferred): BARCODEID.PDF
    
    For example, referring to the following image the naming convention will be:
    
    SCIO0011111XXXXXXXXXXXXXXXXXXXXX.PDF
    
    The Barcode ID will be 14 digits or 35 digits. In the 14 digit format, the barcode ID consists of 14 numbers. In the 35 digit format, the barcode ID will be preceded by the word “SCIO”.
    
    Option 2: PatientName_AuditID.PDF
    
    For example: JohnSmith_9999999.PDF
    
    You must enter the Reference Key and upload the medical records pertaining to the audit and the respective reference key. This enables SCIO to process the claim(s) correctly. The Reference Key can be found in the footer section of medical record request. It is a 16 character alphanumeric key (characters from A-F and 0-9) separated by hyphen (-) and labeled as “Reference Key”.

![Barcode & Reference Key](image)

Figure 2-1: Barcode & Reference Key
3 Accessing the Provider Portal

To access the Provider Portal application, follow these steps:

1. Type/copy-paste the following URL provided by the Admin into one of the compatible browsers (preferably, Google Chrome or Internet Explorer).

   https://sciopropviderportal.sciohealthanalytics.com

   The Provider Authentication page appears as shown in the following screenshot:

   ![Figure 3-1: Provider Authentication](image)

   **Figure 3-1: Provider Authentication**
4 Authenticating the Provider

On the Provider Authentication page, provide the following information:

1. Enter the username in the Username text box. The username can be any one of the following:
   - Hospital Name
   - Pharmacy Name
   - Provider Name
   - Third Party Vendor Name

2. Enter the reference key in the Reference Key text box. You must enter the Reference Key and upload the medical records pertaining to the audit and the respective reference key. This enables SCIO to process the claim(s) correctly. The Reference Key is a one-time authentication key which expires after the completion of a required transaction. The Reference Key is valid for 90 days from the date of generation. Once the key is utilized for authentication and uploading of the PDF documents, the key expires. You can find the Reference Key at the footer section of the Medical Record Letter Request. It is a 16 digit alphanumeric key (characters from A-F and 0-9) separated by hyphen (-) and labeled as Reference Key.

   The Reference Key contains the digits 0-9 and letters A – F. Avoid using the letter O instead of zero and letter I instead of the number one.

An Information icon is displayed in front of the Reference Key text box. On mouse hover, a tool tip appears and displays the location of the Reference Key within the medical record request letter.
Validations for Reference Key

- If the entered Reference Key is not in the SCIO system, the following message appears:

- If you enter a Reference Key that is already used for uploading the Medical Records on the system, the following message appears:

- If multiple users try to use the same Reference Key in one instance (multiple transactions at the same time), the user who gets authenticated first by the system will hold the Reference Key to complete the transaction and other users will receive the following message:

  The Reference Key is currently being used by another user. Please use a different reference key for authentication.

- If a session is running and you try to open another session in a different tab (within the same browser), after entering all the valid information, and click Next, the system displays the following warning message:

  A session is already active. Do you want to end the other session and continue?
3. Enter a valid email ID required for communication related to the medical record upload in the **Email Address** text box.

4. Click **Next**.

5. On the **Disclaimer** page, select the **I understand the above information to upload the medical records to SCIO Health Analytics** check box:

6. Click **Confirm**. The **Medical Record Upload** page appears.
5 Uploading the Medical Records to the Provider Portal

You can upload one or more medical records for a single Reference Key or for multiple Reference Keys.

To upload a medical record into the Provider Portal application, follow these steps:

1. Ensure to upload the medical record document with the SCIO barcode on the first page.
2. Ensure you follow the document naming convention Patient Name_AuditID.PDF or <BarcodeID>.PDF. This ensures that the correct medical record document gets attached to its respective audit.
3. On the Medical Record Upload page, enter the required Reference Key pertaining to the audit ID associated with the medical record in the Reference Key text box.

4. Select the Verify Key check box. The system validates whether the entered Reference Key pertains to a verified audit ID and the following icon appears next to the Reference Key text box as shown in the following screenshot:

   - A Checkmark (✓) icon appears followed by a text Verified.
   - An Information (i) icon appears followed by a text Audit ID. On mouse hover the Audit ID icon next to the Audit ID text, the audit ID(s) pertaining to the entered Reference Key appears as shown in the following screenshot:

Figure 5-1: Medical Record Update
• You can cross verify whether the medical record you want to upload pertains to the Audit ID displayed.

• When the current user session becomes inactive for 20 minutes, the session will get expired.

5. Click the **Attach PDF Documents** button.

A pop-up appears. If you enter a non-RUG Reference Key, the **Check this box to confirm combining of the uploaded files for proper routing** check box will be displayed and by default selected as shown in the following screenshot:
If you enter a RUG Reference Key, the **Check this box to confirm combining of the uploaded files for proper routing** check box will not be displayed as shown in the following screenshot:

![Attach File – Non-RUG](image)

**Figure 5-5: Attach File – RUG**

6. Click **Browse Files**. Browse and select the PDF file you need to attach and click the **Open** button.

![Attach File](image)

When you upload the required PDF without following the naming convention, the following message appears:

![NOTE](image)

The document(s) you are trying to upload does not follow the required document naming convention. Preferred naming conventions are: "BarcodeID.PDF" or "PatientName_AuditID.PDF" for successful upload and attachment.
7. Click the **Proceed** button. The attached document appears on the **Medical Record Upload** page as shown in the following screenshot:

![Figure 5-6: Attached Document](image)

You can attach multiple documents to the same reference key by clicking the **Attach PDF Documents** button on the **Medical Record Upload** page. You can also upload medical records pertaining to multiple reference keys. To do this, refer to the [Uploading Medical Records for Multiple Reference Keys](#) section.

- To attach more than one document pertaining to the same Reference Key, click the **Attach PDF Documents** to attach all of them.
- Ensure that each document you upload must have a SCIO barcode regardless of whether it belongs to the same or different Reference Key.
- If you have received more than one medical record request and each pertaining to different reference keys, you must enter the Reference Key and upload its respective medical record along with the Barcode page.
- The **Upload** button will be enabled only after you upload at least one PDF document.
- You can upload up to 35 PDF documents pertaining to the same or different reference keys for a required transaction.
- The maximum number of Reference Keys allowed to add per transaction is 20.
• The **Delete** icon enables you to delete an attached file.

• The **Total allowed size** of the PDF documents collectively per transaction is 2.50 GB.

• The **Currently occupied size** on the Medical Record Upload page refers to the current document size pertaining to the current transaction.

• While uploading the files in chunk, if any error occurs at the backend, the following error messages appears. The reference key used, will not expire and you will enable you to retry the upload process.
Once you click the **Upload** button, you cannot go to the previous pages. If you do so, your current user session will get terminated.

8. Click the **Upload** button. The following message appears:

9. Click **Yes** to upload the required PDF document. A **Progress Bar** window appears and displays the progress of the medical record upload.

The following information will be displayed on the **Progress Bar** window:

- **Percentage of the upload progress**
- **Uploaded**: Number of Megabytes (MB) of the document uploaded
- **Speed**: Speed (in Kbps) of the documents being uploaded
- **Time Remaining**: Time remaining (in seconds) for the upload to get completed
Once the medical records are uploaded, you will be navigated to the **Upload Successful** page as shown in the following screenshot:

![Upload Successful](image)

**Figure 5-7: Upload Successful**

You can view the Reference Key, Audit ID (s), Original Document Name, Document Size and Uploaded Date in a tabular format.

This confirms that the document upload is successful and will be moved to the SCIOMine server for further scanning. Post scanning, SCIO will send an email regarding the status of the scan to your registered email address.

If the provider fails to follow the upload instructions before uploading, it will be manually reviewed by the mail room team and will be attached to the audit. To attach the record manually, it will take at least three to four weeks. For example: First page with SCIO barcode is not uploaded.

There are chances that the e-mail may go to spam. In such cases, you can check your junk mail folder for any emails sent from the SCIO domain. To move the email to your Inbox and to receive all the future emails from SCIO domain to your Inbox, right-click the email from the **Junk** folder and click **Not Junk**.

- Click **Download** to download the medical records in a PDF format.
- Click **Print** to print the medical records.
- Click **Authenticate and Upload** to refresh the current session on the **Provider Portal** application (If you want to upload more documents for different Reference Keys) and the following message appears:

---

**NOTE**

Click **Download** to download the medical records in a PDF format.

Click **Print** to print the medical records.

Click **Authenticate and Upload** to refresh the current session on the **Provider Portal** application (If you want to upload more documents for different Reference Keys) and the following message appears:
• Click **Yes** to refresh the current session and the **Provider Authentication** page appears.

### 5.1 Uploading Medical Records for Multiple Reference Keys

To upload medical records pertaining to multiple reference keys, follow these steps:

1. Click **Add Reference Key** on the **Medical Record Upload** page as shown in the following screenshot:

![Figure 5-8: Add Reference Key](image1)

   **Figure 5-8: Add Reference Key**

   A new Reference Key section appears under the existing one on the **Medical Record Upload** page.

2. Enter the new reference key and attach the documents for upload as shown in the following screenshot:

![Figure 5-9: Multiple Reference Key Upload](image2)

   **Figure 5-9: Multiple Reference Key Upload**
To delete the added Reference Key section, click the **Delete** icon.

*Figure 5-10: Delete Reference Key Section*

3. Once you finish attaching the required medical records, follow the steps mentioned from step 8.
6 Understanding the Post Upload Process

- After you upload the PDF documents on the Provider Portal application, the documents moves to the SCIO’s system. An email will be sent to the registered email address upon successful completion of the scanning of the uploaded documents.

Sample: Documents received successfully

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Upload Status</th>
<th>Uploaded with Reference Key</th>
<th>Audit ID</th>
<th>Document Size</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Process.pdf</td>
<td>Successful</td>
<td>88-88-88-88-88-88-88-88</td>
<td>10002</td>
<td>285.339 KB</td>
<td>Document Received successfully</td>
</tr>
</tbody>
</table>

If any of the document upload status is "Failed", please follow the below steps to re-upload the document:

1. Ensure that the documents are not password protected or corrupted and is virus free.
2. Go to the Provider Portal website.
4. Navigate to the Medical Record Upload Page and enter the Reference Key pertaining to the ‘Failed’ document.
5. Attach the documents and click on Upload button.

Note: Successful upload does not signify that we have received all the required Medical Records from you for a claim. Hence, we may get back to you in case of any discrepancy found.

Thank You,
SCIO Health Analytics Team (An EXL Company)

Figure 6-1: Document Received Successfully

- After you upload the PDF documents on the Provider Portal application, the documents moves to the SCIO’s system. During the scan, if any of the following instances are found, the scanning will fail and an email will be sent to the registered email address:
  
  - Corrupted document
  - Document infected with virus
  - Password protected document
  - Incomplete document
  - Encrypted document
  - Document process failed due to unidentified reason

Sample: Document process failed due to unidentified reason
The status of the documents uploaded by you on 11/27/2019 - 14:22 EST is provided below.

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Upload Status</th>
<th>Uploaded with Reference Key</th>
<th>Audit ID</th>
<th>Document Size</th>
<th>Remark</th>
</tr>
</thead>
</table>

If any of the document upload status is "Failed", Please follow the below steps to re-upload the document.

1. Ensure that the documents are not password protected or corrupted and is virus free.
2. Go to the Provider Portal website.
3. Authenticate yourself using the Reference key: CC-CC-CC-CC-CC-CC-CC-CC
4. Navigate to the Medical Record Upload Page and enter the Reference Key pertaining to the 'Failed' document.
5. Attach the documents and click on Upload button.

**Note:** Successful upload does not signify that we have received all the required Medical Records from you for a claim. Hence, we may get back to you in case of any discrepancy found.

Thank You,
SCIO Health Analytics Team (An EXL Company)

---

**Figure 6-2: Document process failed due to unidentified reason**

- The email will contain the consolidated list of medical record file upload status and remarks as shown in the following sample screenshot:

**Sample2: Corrupted/Password Protected documents**

- If the uploaded document doesn’t have a barcode on the first page, no email will be sent and the letter will be sent to the mailroom for scanning manually. The mailroom team will add barcode to the document and will allow the job to process.
7 Understanding Post Upload Process for Non RUG and RUG Reference Keys

• You can combine files for the same non-RUG Reference Key with relevant barcode. To do this, follow these steps:
  
  a. Attach more than one file with relevant barcode.
  
  b. Check the **Check this box to confirm combining of the uploaded files for proper routing** check box on the **Attach File** pop-up.
  
  c. Click **Proceed**.
  
  d. Click **Upload**. The Mailroom users will be able to view that the files uploaded are combined into a single file.

• You can non combine the files for the same non-RUG Reference Key with relevant barcode. To do this, follow these steps:
  
  a. Attach more than one file with relevant barcode.
  
  b. Uncheck the **Check this box to confirm combining of the uploaded files for proper routing** check box on the **Attach File** pop-up.
  
  c. Click **Proceed**.
  
  d. Click **Upload**. The Mailroom users will be able to view that the files uploaded are not combined into a single file, instead the individual files with the barcode matching are attached to the required audits.

• You can combine files for the same non-RUG Reference Key with irrelevant barcode. To do this, follow these steps:
  
  a. Attach more than one file with irrelevant barcode.
  
  b. Check the **Check this box to confirm combining of the uploaded files for proper routing** check box on the **Attach File** pop-up.
  
  c. Click **Proceed**.
  
  d. Click **Upload**. The Mailroom users will be able to view that the files uploaded are combined into a single file. The combined file is moved to the exception queue, as the barcode does not match.

• You can attach single file for a RUG Reference Key with relevant barcode. To do this, follow these steps:
a. Attach just one file with relevant barcode.

b. Click Proceed.

c. Click Upload. The mailroom users will be able to view the file attached to the respective audit. In case, the attached file does not have a relevant barcode then the file will move to the exception queue.

• You can attach more than one file for a RUG Reference Key with relevant barcode. To do this, follow these steps:

  a. Attach more than one file with relevant barcode.

  b. Click Proceed.

  c. Click Upload. All the files attached will move to the exception queue if there are more than one files for RUG program.