Irish Life health

Provider Portal

User Guide Admin

V3.1_2023

Table of Contents

1 Introduction

The Irish Life Health Provider Portal gives providers the ability to:

- Check a member's current level of cover,
- Access documentation,
- Draw reports,
- Manage the users that have access to the provider portal, and
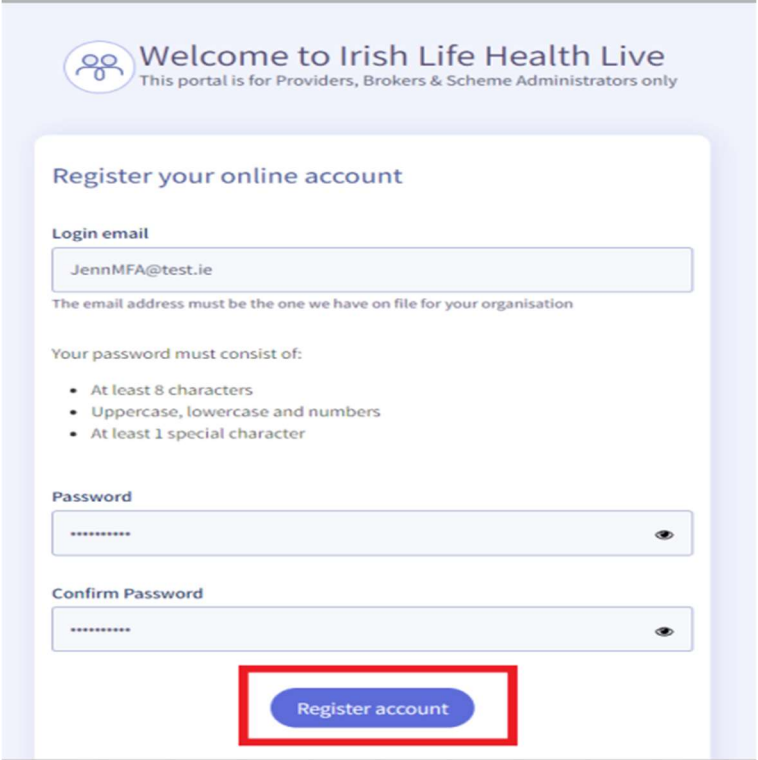- View your own user access details.

2 Registering as an Existing User

Note	a) This is a once-off step to register for the Irish Life Health Live portal for existing portal users. All existing Provider Admin portal users must re-register unless they have an existing Irish Life Health member portal account. If you have an existing member portal account and are using the same email address for both applications follow the notes in point (b) below.
	b) **Important:** you may have already used the **same email address** to log in to the Irish Life Health member portal to access your own health policy as a customer. If you have, and are using the same email address for this Irish Life Health Live application, you **do not need to re-register**. Simply login using the email address and password you use for the member portal and enter your Provider admin member number to access your portfolio of customers on the Irish Life Health Live application.
	c) If you do not have an Irish Life Health member portal account or you use a different email address to access your member portal from what you use as a Provider Admin to access your admin portal, please follow the steps below to register.
	d) Irish Life Health have introduced an extra step for our scheme admins to access your Irish Life Health portals to ensure every step is taken to keep all data stored safe and secure.The following slides are a step-by-step guide on how to set up multi factor authentication (MFA) if required.

2.1	Enter the Irish Life Health Live address in your addresss bar and press Enter.

2.2	Enter your:
	
	• Email address
	• Create a password that matches the requirements listed:
	    o At least 8 characters
	    o Uppercase, lowercase & numbers
	    o At least one special character

2.3	Click Register account.

Welcome to Irish Life Health Live
This portal is for Providers, Brokers & Scheme Administrators only

Register your online account

Login email

JennMFA@test.ie

The email address must be the one we have on file for your organisation

Your password must consist of:

• At least 8 characters
• Uppercase, lowercase and numbers
• At least 1 special character

Password

••••••••••

Confirm Password

••••••••••

Register account

Notes	The email address being used to register must match what Irish Life Health has on record for you as a Provider admin.

2.4	When logged in you will be prompted to complete the setup of a two-factor authenticator.
	This is a one time setup process.
	• If you already have an authenticator you can proceed to the next step. • If you don't have an authenticator, follow steps to download.
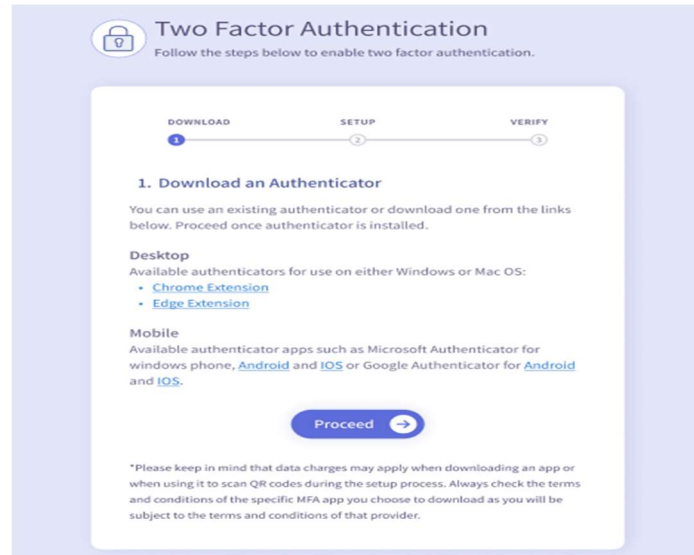
2.5	For the purpose of this guide we progress with a mobile device, Google Authenticator setup
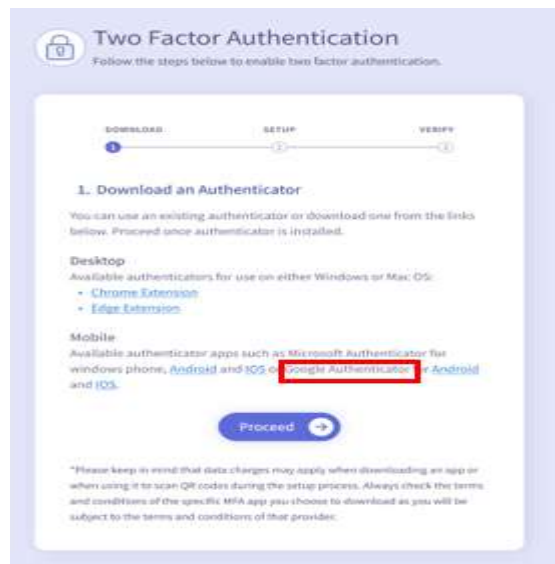
N.B. Whichever authenticator app you choose, you will be subject to the Terms of Use of that provider.

2.6 Download the authenticator on your mobile device.
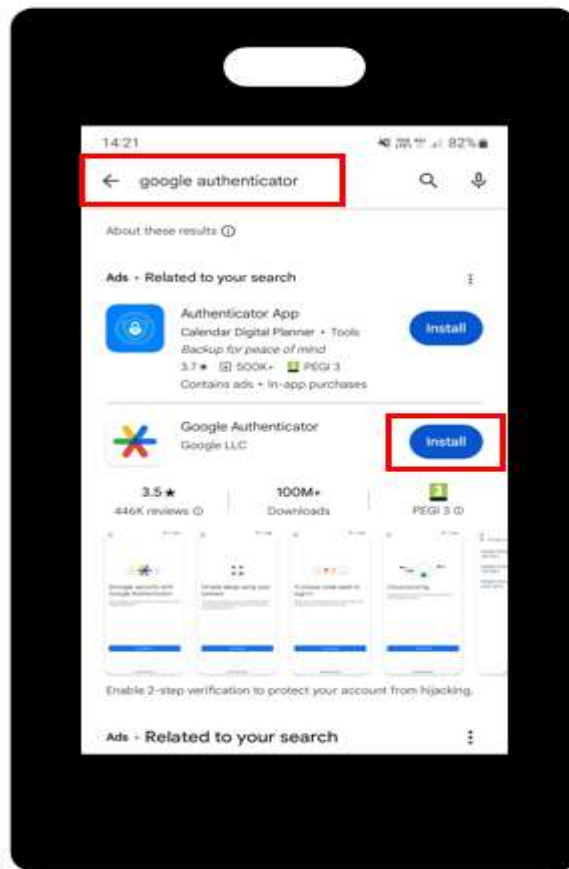
2.7 Open the app store on your mobile device, search for "Google Authenticator" and Install.

2.8 Download the authenticator on your mobile device.

Open the app and select "Get started".

Next login with an either:

1. An existing Google account, or
2. "Use Google Authenticator without an account"
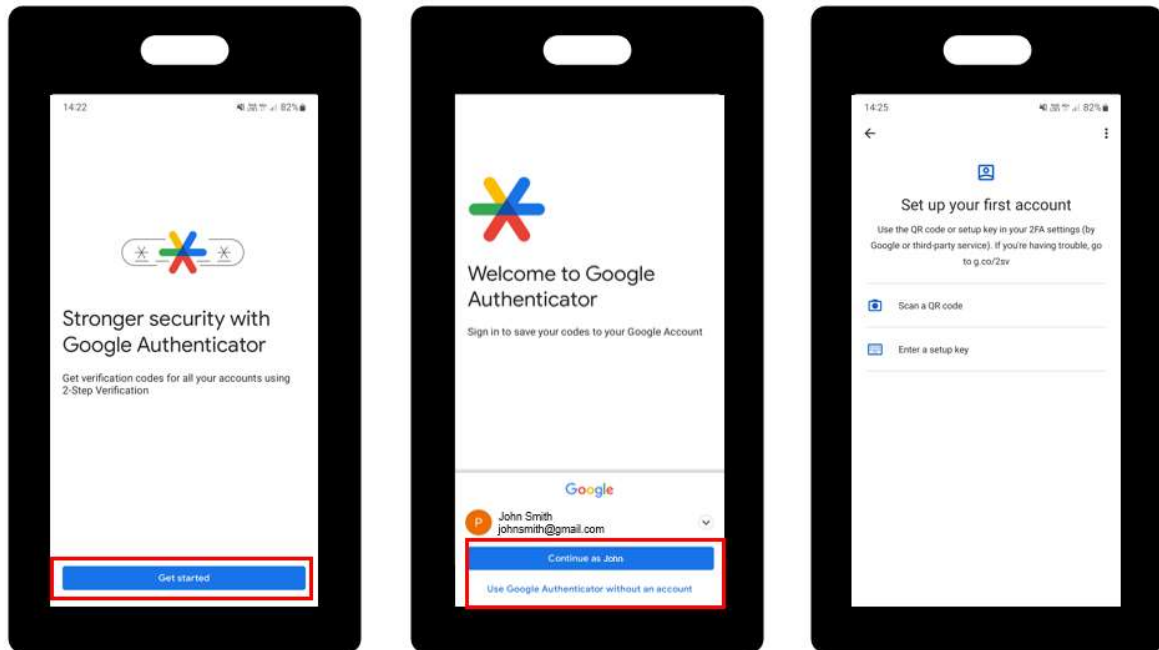
2.9 Success. You have downloaded the authenticator to mobile.

Click "Proceed" to progress to the Setup stage.
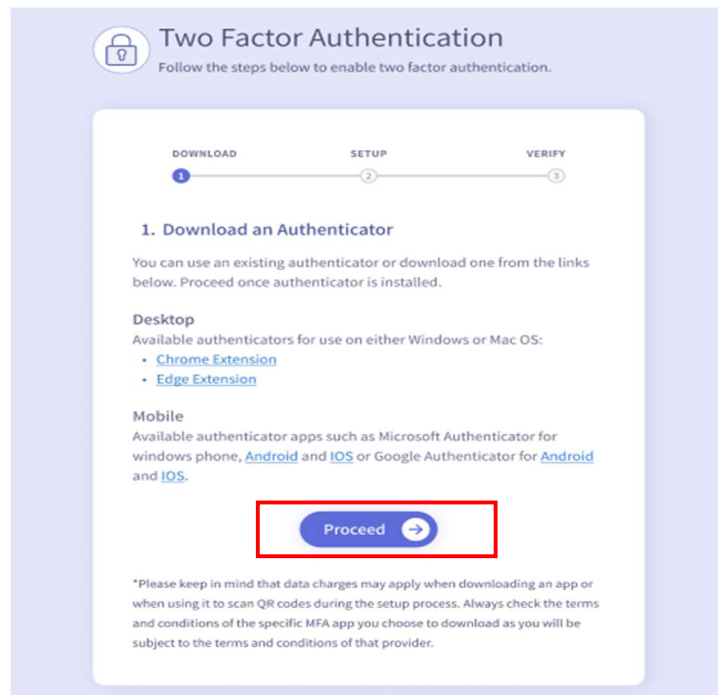
2.10 You can setup the authenticator by:

1. Scanning the QR code, or
2. Manually entering the 32-digit secret key
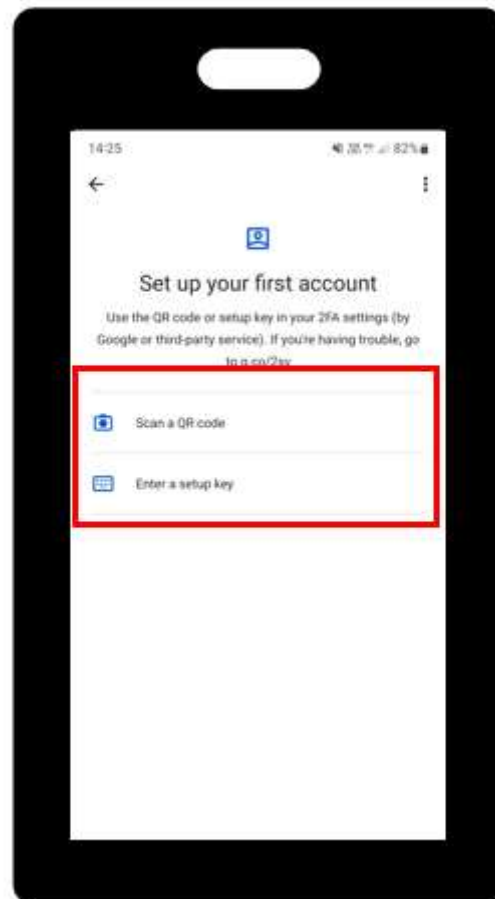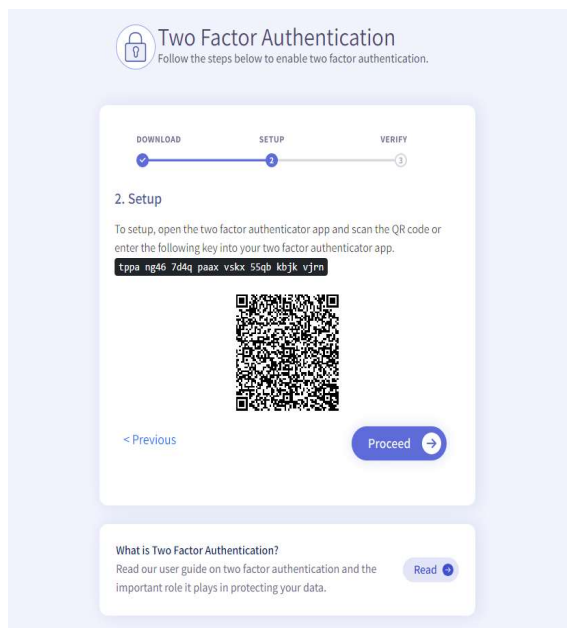
2.11 QR Code Option.

Select "Scan a QR code" and give the app the appropriate permissions to use the camera.

Use your mobile device to scan the QR code on the portal Two Factor Authentication setup screen.

2.12 Setup the authenticator [Manual Option]

Select" Enter a setup key" option

Enter the account details requested and click Add.

- Account Name: "Irish Life Health Live"

 - Your Key: Enter the 32-digit secret key from the setup page

 - Type of Key: Time based
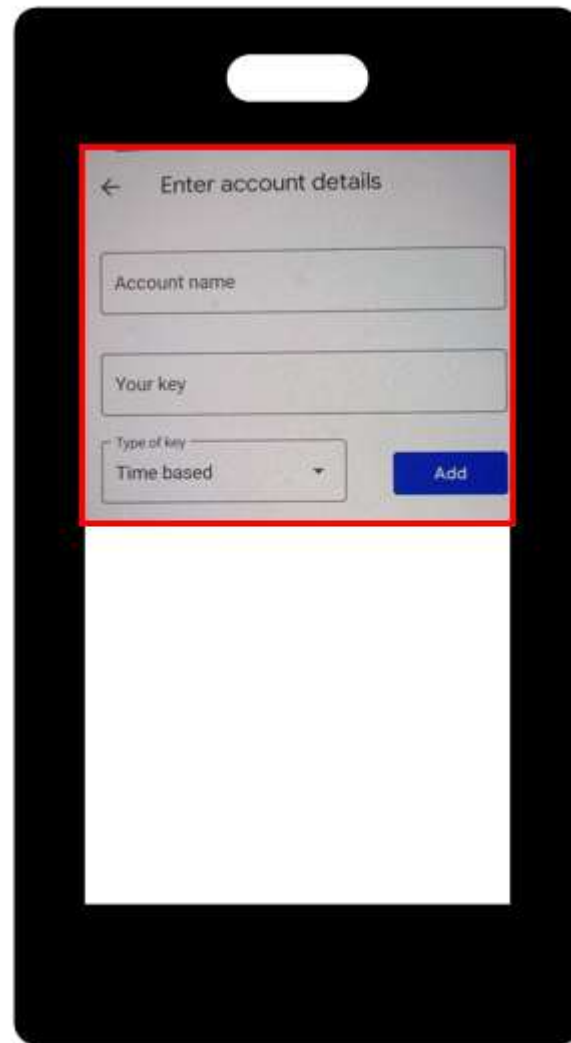
2.13 Success. You have setup the authenticator.
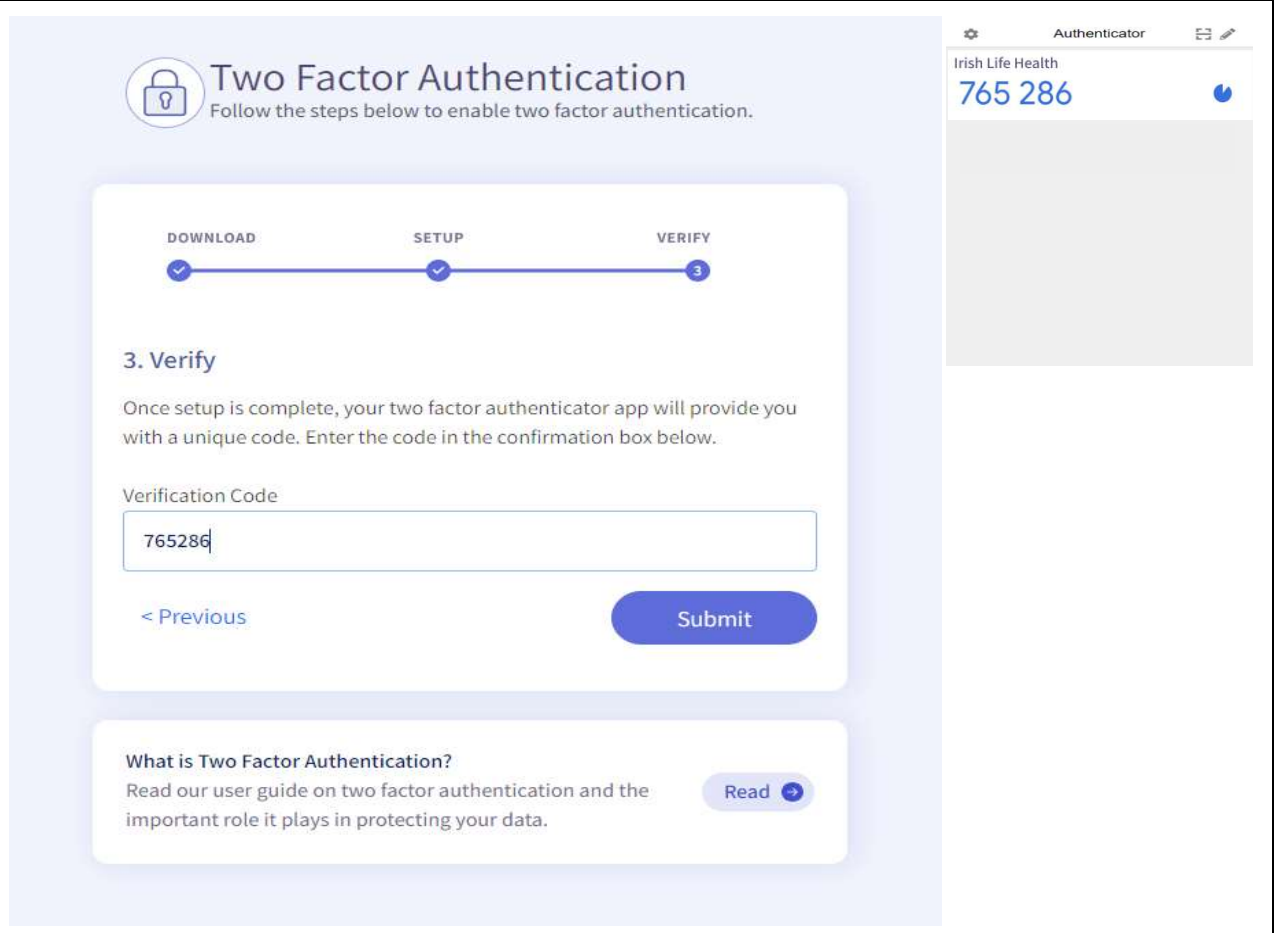
The authenticator will immediately show a 6-digit code which will refresh periodically.

Click "Proceed" to move to the Verify screen.

2.14 Enter the 6-digit authentication code into the verification code box on the Verify screen and select "Submit".

If there is an error:

1. Retry, confirming the correct digits are input, which match the code on the authenticator at the time of submission.
2. Go to the previous page and re setup the authenticator.

2.15 Success. You have verified the authenticator and this one-time setup is complete.

Keep your authenticator safe as you will be required to enter the 6-digit authentication code every time you login.

The below is showing the set-up MFA on the Desktop.

2.2	Login using your existing username and password as normal.
2.2.1	Enter your: • Email address • Password
2.2.2	Click Login.

Notes	The email address being used to register must match what Irish Life Health has on record for you as a Provider admin.

2.2.3	When logged in you will be prompted to complete the setup of a two-factor authenticator. This is a one time setup process. • If you already have an authenticator you can proceed to the next step.

	• If you don't have an authenticator, follow steps to download.
2.2.4	For the purpose of this guide we will select the Desktop, Chrome Extension.
N.B. Whichever authenticator app you choose, you will be subject to the Terms of Use of that provider.	
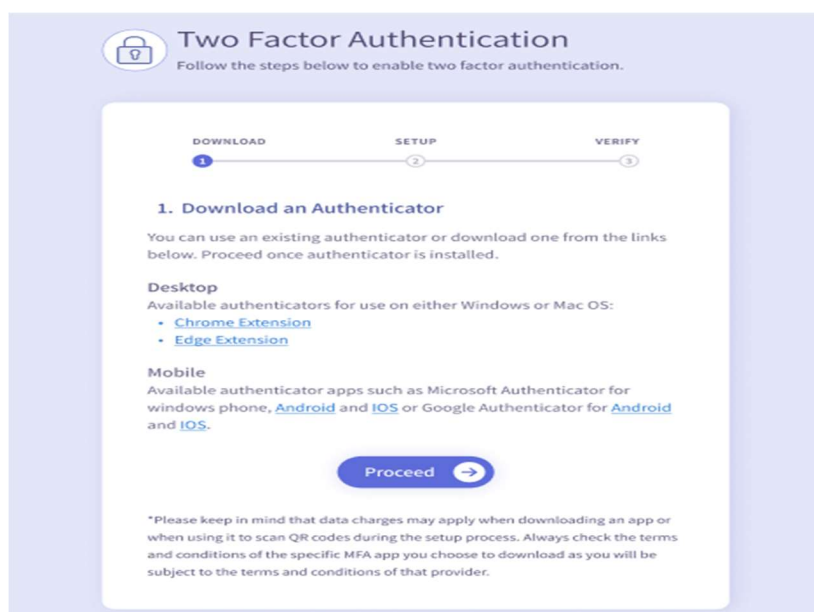
2.2.5 The download page for the Chrome extension will open from the link.

Select the blue "Add to Chrome" button on screen.
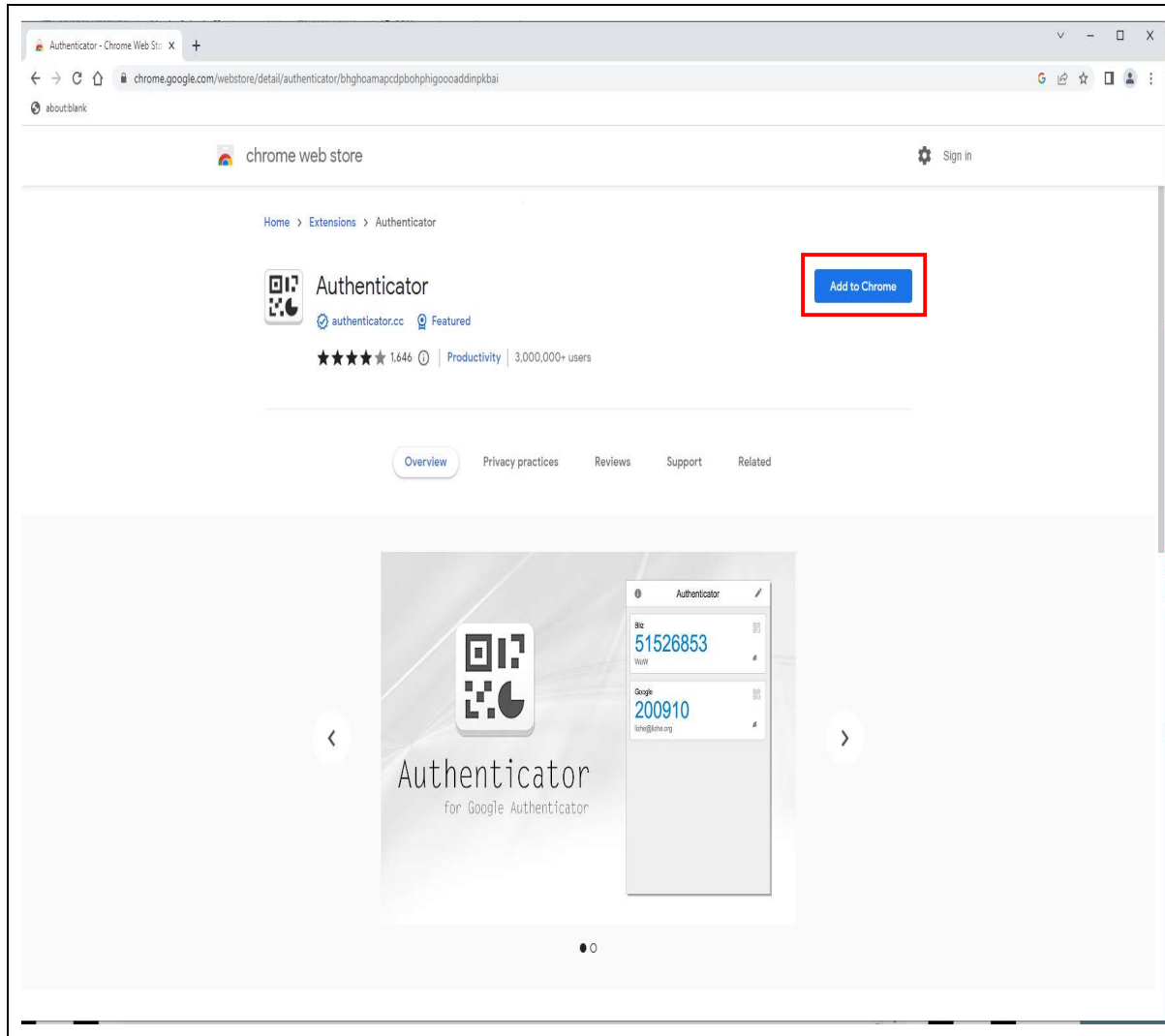
2.2.6 Download the authenticator extension to your desktop.

Select the grey "Add Extension" button in the pop-up screen.
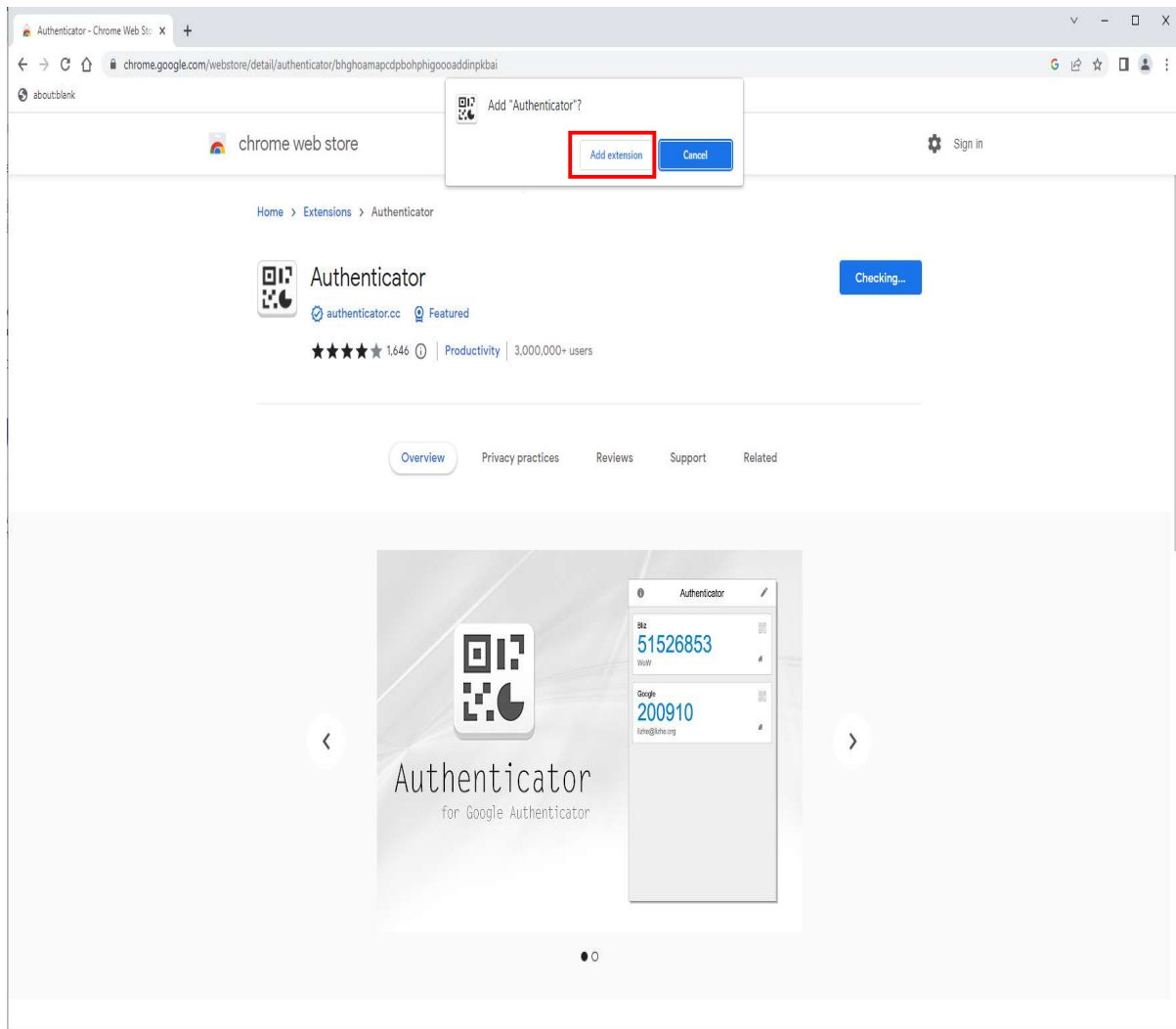
2.2.7 To open, this can be found in the extension toolbar to the right of the address bar at the top of the screen.

Next you need to go back to the portal to complete setup.
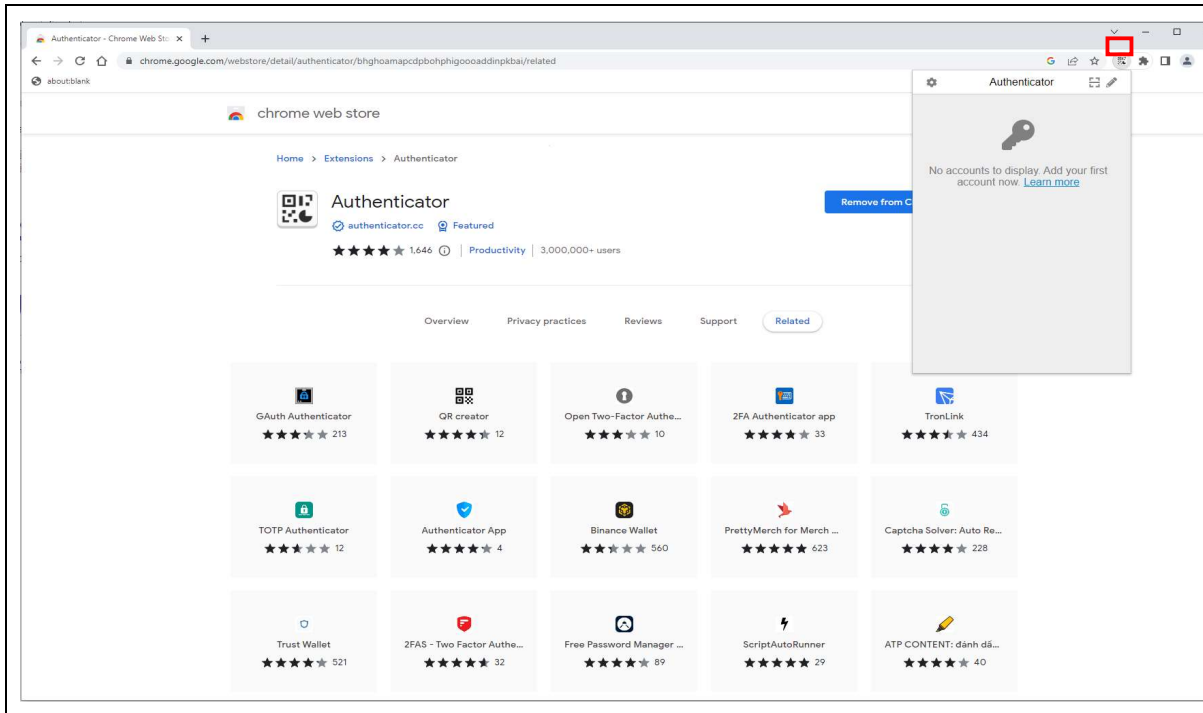
2.2.8 Success. You have downloaded the authenticator to your desktop browser.

Click "Proceed" to progress to the Setup stage.
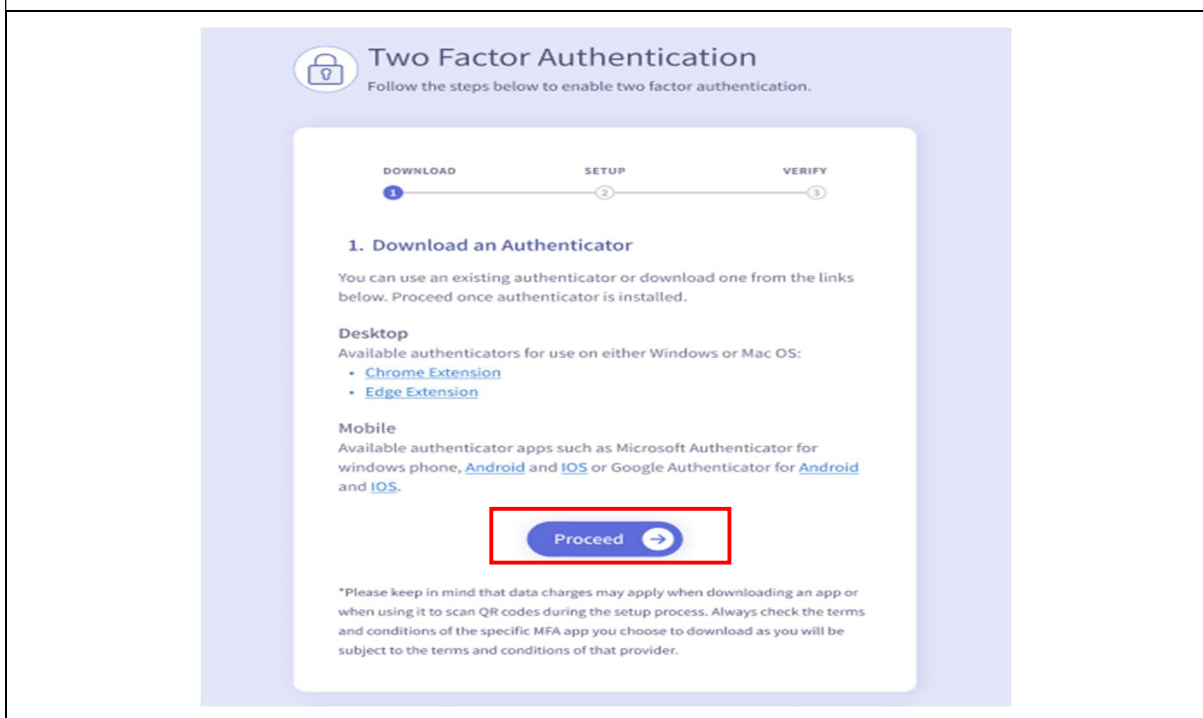
2.2.9 Navigate to the browser extension toolbar and open the authenticator.

This can be found in the extension toolbar to the right of the address bar at the top of the screen.

2.2.10 You can setup the authenticator by scanning the QR code or manually entering the 32-digit Secret Key.

- Click the ⬚ icon for the scan QR code setup option.
- Click the pen icon for the manual setup option.
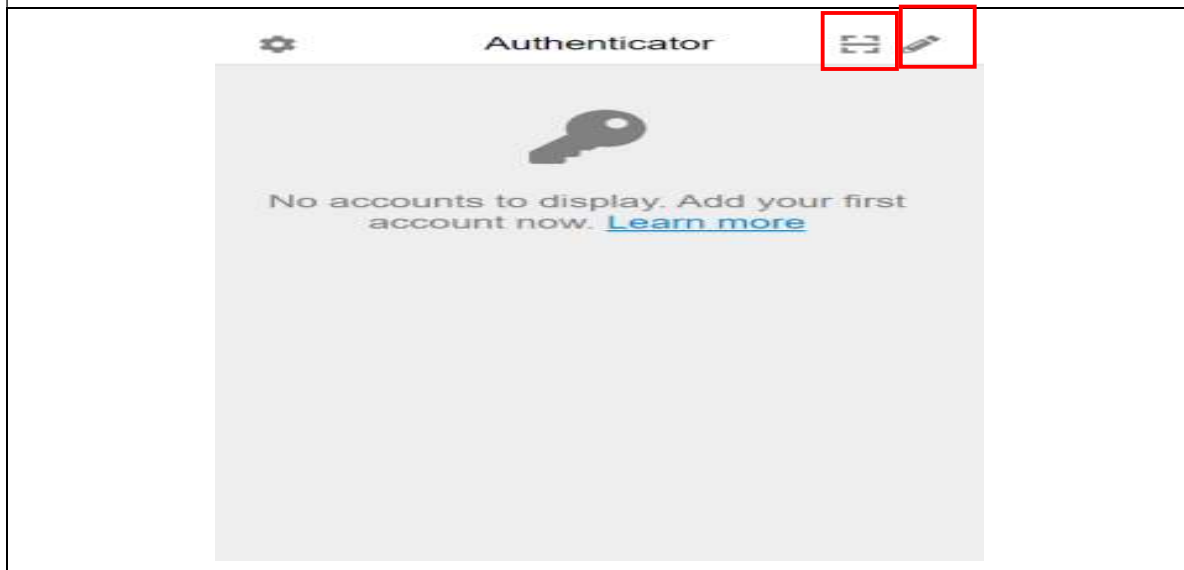
2.2.11 QR Code Setup.

Click the ⬚ icon in the authenticator toolbar to enable the scanning option.

Select the QR code on screen by dragging the scanning square over the location of the code with your mouse as shown in the image.
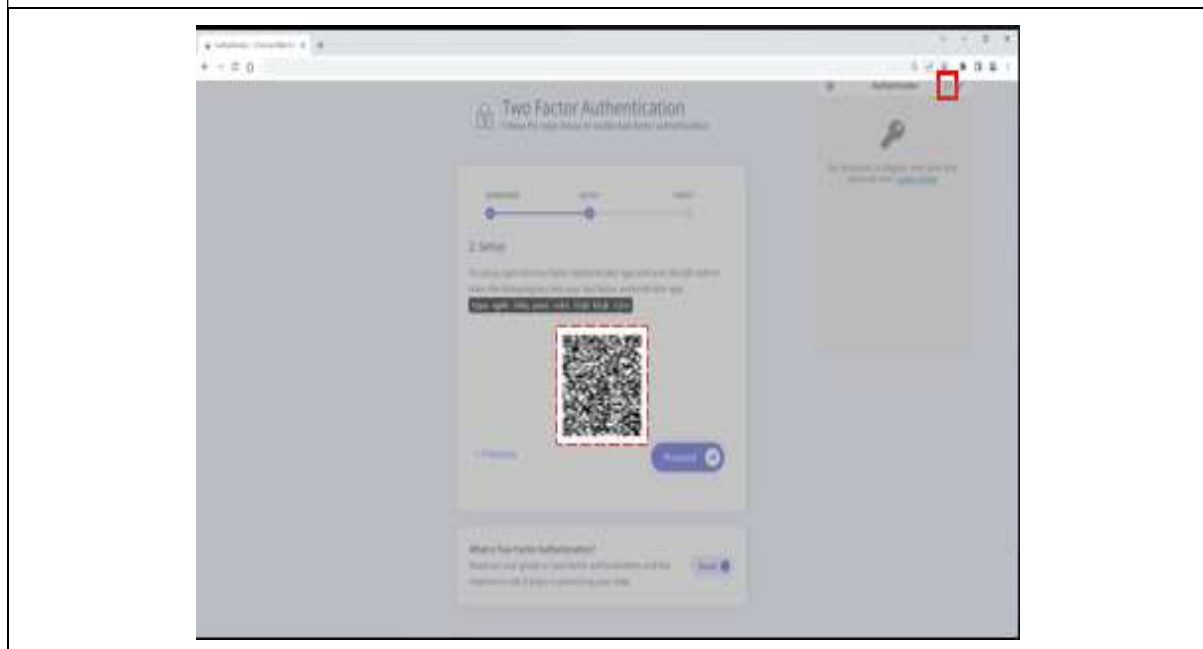
2.2.12 Manual setup.

1. Click ✏

2. Click ＋

3. Select "Manual Entry"

4. Fill details:

 - Issuer: "Irish Life Health Live"

 - Secret: Enter the 32 digit secret key from the setup page.

 - Click Ok
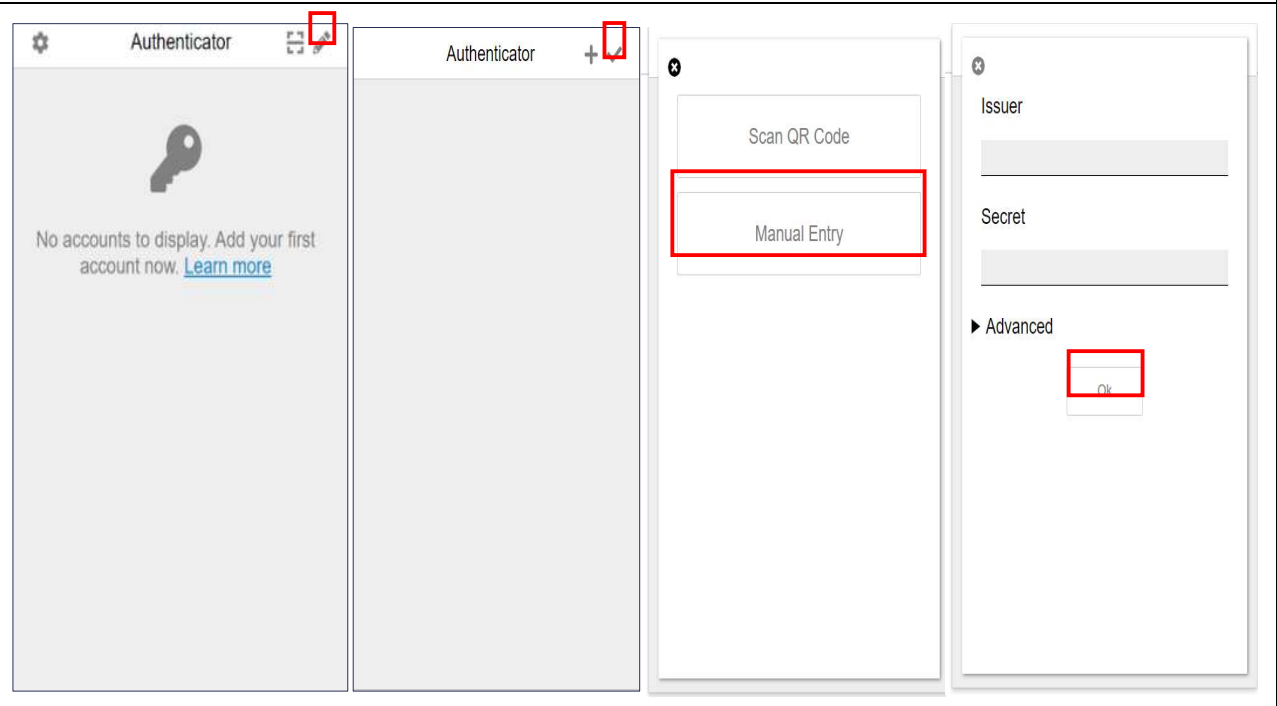
2.2.13 Success. You have setup the authenticator.

    The authenticator will immediately show a 6-digit code which will refresh periodically.

    Click "Proceed" to move to the Verify screen.

2.2.14 Enter the 6-digit authentication code into the verification code box on the Verify screen and select "Submit".

If there is an error:

1. Retry, confirming the correct digits are input, which match the code on the authenticator at the time of submission.
2. Go to the previous page and re setup the authenticator.

2.2.15 Success. You have verified the authenticator and this one-time setup is complete.

Keep your authenticator safe as you will be required to enter the 6-digit authentication code every time you login.

3 Main administrator registration

The first step in creating access to this new version of the Provider Portal, is for one person with access to the existing portal to re-register and create other administrators and other users. Only one person needs to complete this registration step.

This person can then create other admin users. Users with admin access can then create all users for the portal for their teams as needed.

For this step, the first admin user is a user who already has access to the existing version of the health provider portal. In other words, you already have access to this version of the portal and know your member number.

So, if you are this first main admin user, follow these steps and re-register for the Irish Life Health Live Provider Portal and then follow the steps in the next section to create other users once you have logged into the Portal. It is a simple process to create users from within the Portal.

Let's look at how to register:

Enter the Irish Life Health portal address in your Internet Browser addresss bar and press Enter.

Click the Register tab.

1. On the Register tab,
2. Enter your email address.
3. Create a password that matches the requirements listed:
    a. At least 8 characters
    b. Uppercase, lowercase & numbers
    c. At least one special character
4. Confirm your password.
5. Click Create Your Account.

You will receive an email asking you to confirm your email address. Click Confirm your email.

Confirm Your Email

Hi there,
You recently opened an Irish Life Health online account.

Please confirm your account by clicking this link:
Confirm your email
If you did not register an account, please ignore this email or contact support if you have questions:
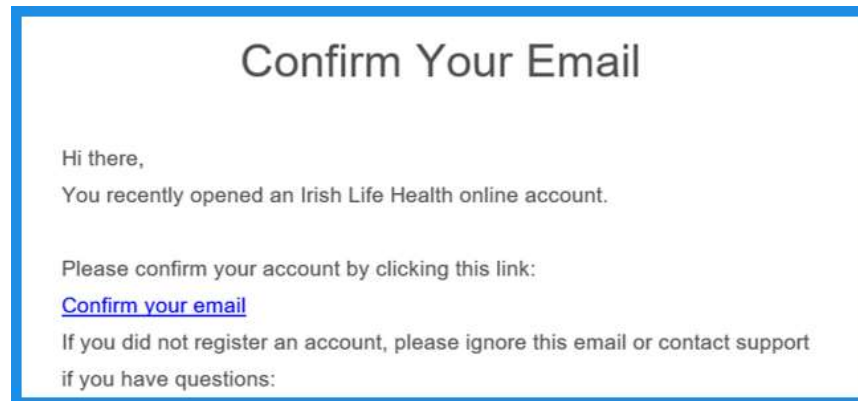
You will be routed to a confirmation screen.

Click Back to Login.

Confirm email

Thank you for confirming you email

Back to log in
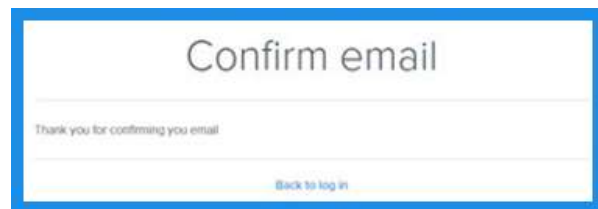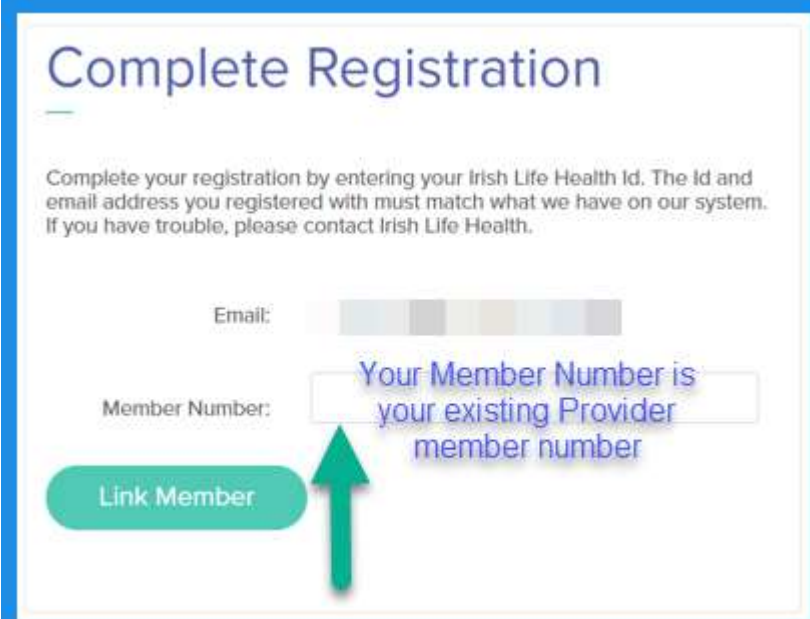
Log in using your email address as your user name and by entering your password.

Click the Login button.
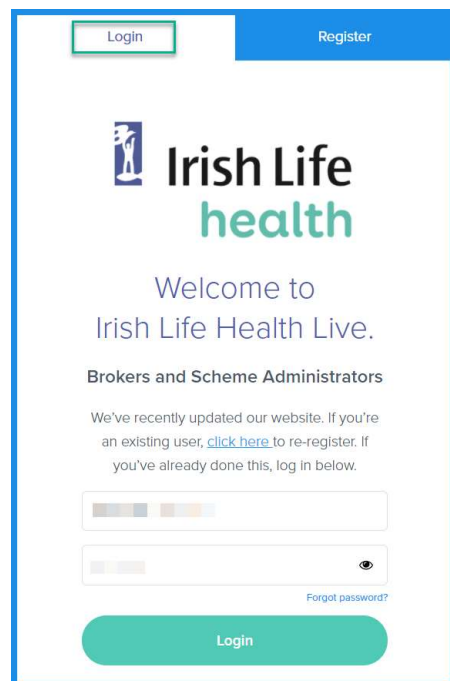
Enter your Provider Member Number (as registered with Irish Life Health) and click the Link Member button to complete your registration process.

Some of our portal users have access to the member portal as a customer too. They may access both the member and provider portal with the same email address for both.

Where a user accesses the portal as a customer member and as a provider user AND uses the same email address for both, there is no need to re-register as a user on this version of the provider portal.

If this describes you, then you do not need to re-register to use this provider portal. All you need to do is access the Irish Life Health Live portal and enter your email address and password that you use for the member portal and link your provider member number and click Link Member.

4 Create New Users

Anyone with administrator access in the portal can create additional users.

If you are the primary administrator and you have registered – see section 3 – your next step will be to create users for all the people you would like to have access to your provider portal.

4.1 Two types of access

- Some of these users will only need access to check a member's level of cover. These types of users can be created as **Agent** users.
- Some of these users may need access to all functionality, including the ability to also create and edit user access and access reports. These types of users can be created and given **Admin** access.

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1. Click My Account from the Menu.
2. Scroll down on the User Management tab to the Create User section on this page.
3. For each user, enter a Name and Surname in the Name field.
4. Enter their Email Address.
5. Select the type of access the user should have (Admin or Agent).
6. Click Create User

Each user will receive an email directing them to the Irish Life Live portal link at (https://www.irishlifehealth.ie/portal/ilhlive) and will ask them to use the Forgot Password link to create their own password. The next section covers the steps for this.

5   Creating a Password as a Newly Registered User

If you are a new user, and your user access has recently been created by your main admin user, you will receive an email from the Irish Life Health Live Portal welcoming you to the portal and asking you to create your own password. To do this, all you need to do is access the portal and click the Forgot Password link on the Login page. Once you fill in your email address and request a password reset email you can then use this email to create your own password.

Once you receive your welcome email go to the link provided to open the Irish Life Health Live Portal Login page: https://www.irishlifehealth.ie/portal/ilhlive

These are also the steps you need if you want to Reset Your Password in future.

1. On the Login tab, click Forgot Password.
2. Enter your email address.
3. Click Reset my password.
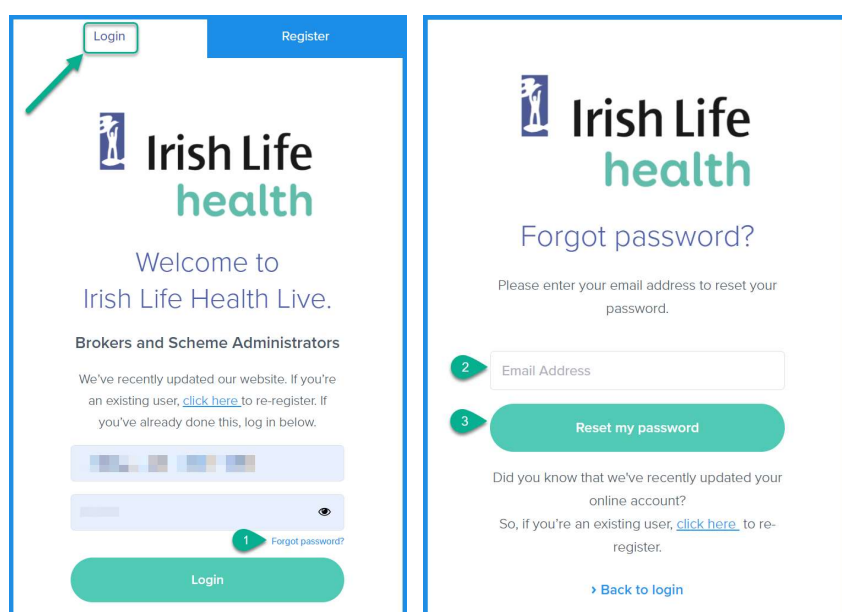
4. Open your email inbox and look for the email from noreply@irishlifehealth.ie. Click Reset your password.
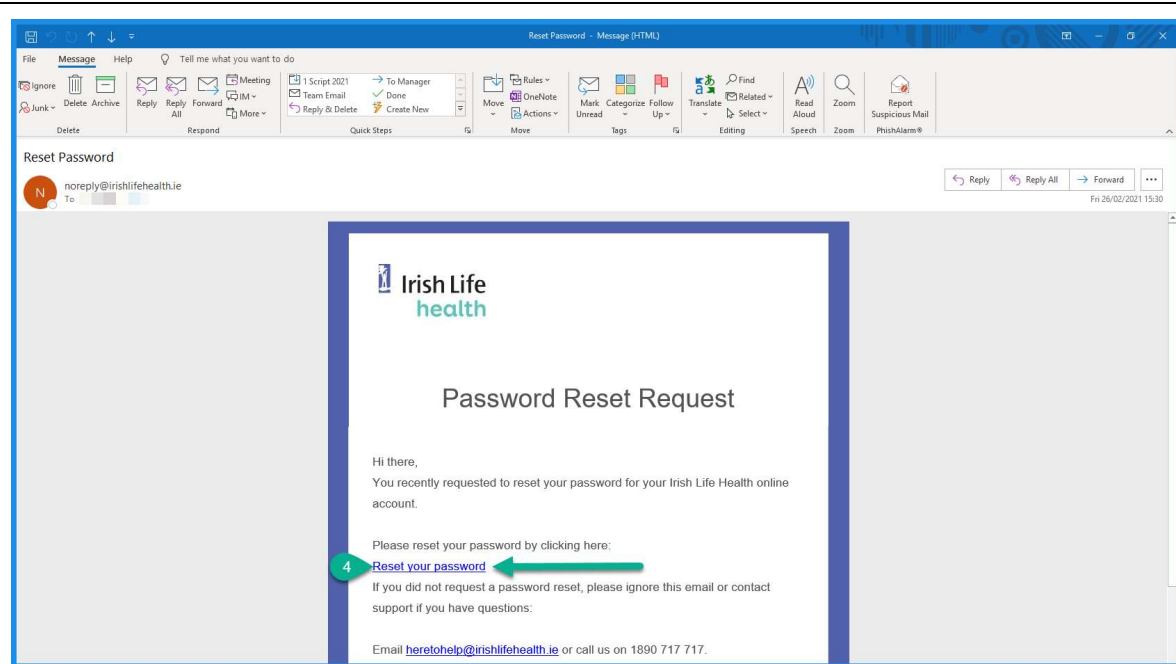
5. This opens the Reset Password screen. Enter a password that meets the requirements.
6. Re-enter this same password.
7. Click Confirm.

6 Logging in

Once you have registered and confirmed or created your password, you can log in to use the portal.

1. Open your internet browser and enter the address for the browser (https://www.irishlifehealth.ie/portal/ilhlive) and press Enter.	
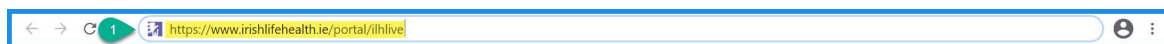
2. Enter your:
    a. Email
    b. Password	

3. Click Login.	

7 The Home page

The home pages provides a convenient hub to the different parts of the portal.

1. Your username (email address) will display at the top of the page.
2. The provider support contact details are displayed at the top of the page too.
3. There are 6 screens in the portal that you can access from this home screen:
   a. Home
   b. Check Cover
   c. Schedules and Forms
   d. Documents
   e. Reporting
   f. My Account
4. Clicking View Reports will take you to the Reporting page.
5. You can also quickly Check Cover from the Home page.
6. Click Log Out to close the portal.

Let's look at how to check a member's cover.

8 Checking Cover

There are 3 ways you can check a member's cover:

    a. By policy number and date of birth,
    b. By member number,
    c. By full name and date of birth

You can access this functionality at the bottom of the Home page or by clicking on the Check Cover menu option.

8.1 Check Cover by policy number and date of birth

1. Click Policy Number as the type of Search.
2. Enter a valid Policy Number in full.
3. Enter a date of birth as DDMMYYYY.
4. Click Find Policy.
5. Click the policy number hyperlink to open the policy details.

The Policy Details page opens in a separate tab.

6. The first tab shows the policy details like the plan name, member number, date of birth, etc. including the policy address details.
7. The second tab shows the detailed cover and benefits for the member.

Policy

6 Policy Details | Cover and Benefits **7**

Policy Details

Start Date
30/12/2020
End Date
29/12/2021
Next Renewal Date
30/12/2021
Status
Live

Rygpabeymy Fvjq-Uhne (Policyholder)

Plan
Select Starter
Member Number

Date of Birth
01/08/1976
Join Date
30/12/2020
First Insured
30/12/2016
Name
Rygpabeymy Fvjq-Uhne

Last Name

Fvjq-Uhne

Addresses on the policy

Postal Address

Address Line 1

Address Line 2

Address Line 3

Town / City

County

If a member's policy is cancelled, you will see this clearly on the policy details screen,

and on the Cover and Benefits tab too.

To view a member's detailed cover details on a live policy:

8. Click the Cover and Benefits tab.
9. View their Plan and hospital cover details by hospital type.
10. To check the member's specific hospital list cover, click the View your hosptial list link.

We recommend that you confirm that your own hospital or centre or facility is covered on the member's hospital list.

If a hospital is designated as not covered on the member's hospital list, the member has no cover in that hospital.

In this first example, the member has cover for public hospitals only.

In this example, the member has cover for public and private hospitals:

When you click the View member' hospital list hyperlink, the relevant hospital list opens in a separate tab.

It shows the hospital list (1/2/3/4 or A/B/C/D) relevant to the member's plan.

You can search for your hospital / centre / facility by area and check the last column.

In this example, a hospital is designated on the Hospital list as *See Table of Cover.*

Dublin			
Beacon Hospital, Dublin 18 - Cardiac procedures	High Tech - Private	Yes	See Table of Cover
Beacon Hospital, Dublin 18	High Tech - Private	Yes	See Table of Cover

When you return to the Cover Details tab for this member, you can see why the hospital list states See Table of Cover. This member has varying rates of high-tech hosptial cover in different high-tech hospitals.

Who is covered?

Select a member to view their benefits and Terms & Conditions.

Xclek Gnbpnm
(Policyholder)

Xclek Gnbpnm
Member Number:

4D Health 4
Personalised Packages: You Extra, Sports Extra, Travel Extra

Member's hospital cover

A summary of the hospital cover on member's plan.

Consultant fees and inpatient scans

- ✔ **Consultant fees** Covered
- ✔ **Inpatient Scans** Covered

Public Hospitals

- ✔ Day Case: Covered
- ✔ Private Room: Covered
- ✔ Semi Private Room: Covered

Private Hospitals

- ✔ Day Case: Covered subject to €50 excess per claim
- ✔ Private Room: Covered subject to €50 excess per claim subject to €2,000 co-payment on certain orthopaedic procedures
- ✔ Semi Private Room: Covered subject to €50 excess per claim subject to €2,000 co-payment on certain orthopaedic procedures

High Tech Hospitals

- ✔ Day Case: Covered subject to €50 excess per claim.
- ✔ Listed Cardiac Procedures: Covered subject to €50 excess per claim
- ✔ Listed Special Procedures: Covered subject to €50 excess per claim subject to €2,000 co-payment on certain orthopaedic procedures
- ✔ Private Room: Covered (Beacon only) subject to €50 excess per claim. 50% Cover in Blackrock Clinic and Mater Private
- ✔ Semi Private Room: Covered (Beacon only) subject to €50 excess per claim. Mater Private and Blackrock Clinic 50% cover.

› View member's hospital list

Tip:

Once you are done checking a member's hospital list and cover details, close the tabs to return to your original tab.

8.2   Check Cover by member number

If you only have a member's Member Number, you can search for a policy with this too.

1. On the Check Cover page,
2. Click Member Number, and
3. Enter the Member Number,
4. Click Find Policy, and
5. Click the Policy Number hyperlink to open the member's Cover Details tab.

Follow the same steps as shown in section 8.1 to check a member's cover and hospital list.

8.3   Check cover by Full Name and Date of Birth

You can also search for a policy by Full Name and Date of Birth.

1. On the Check Cover page,
2. Click Full Name and Date of Birth option, and
3. Enter the member's First Name,
4. Last Name,
5. Date of birth (in DDMMYYYY format), and
6. Click Find Policy.
7. Click the Policy Number hyperlink to open the member's Cover Details tab.

Follow the same steps as shown in section 8.1 to check a member's cover and hospital list.

It is possible that there are more than one policy that match the search criteria.

In this scenario, the results will display in a table. In this example there are 2 policies. Be sure to select the correct policy.

In this example, the member has 2 policies but only one is current and live as can be seen by looking at the Policy Renewal Date.

Search Policy

Search Policy

○ Policy Number   ○ Member Number   ● Full Name and Date of Birth

First Name

Rygpabeymy

Last Name

Fvjq-Uhne

Date of birth

01/08/1976

Find Policy

Policy Number	Member Number	Name	Date of Birth	Plan	Policy Renewal Date
			01/08/1976	Health Plan 13	30/12/2017
			01/08/1976	Select Starter	30/12/2021

9   Schedules and Forms

9.1   To find a Schedule of Benefits for a particular year / period

On the Schedules and Forms page, you can access the Schedule of Benefits for Professional Services and Claim Forms. To access Schedule of Benefits by year:

1. Click the Schedules and Forms menu.
2. On the Schedule of Benefits tab,
3. Click the link for the year that you require.

The relevant Irish Life Health web page opens.

9.2   To find a Claim Form

To access Claim Forms:

1. Click the Schedules and Forms menu.
2. On the Claim Forms tab,
3. Click the link to the Irish Life Health website.
4. The relevant Irish Life Health web page opens.
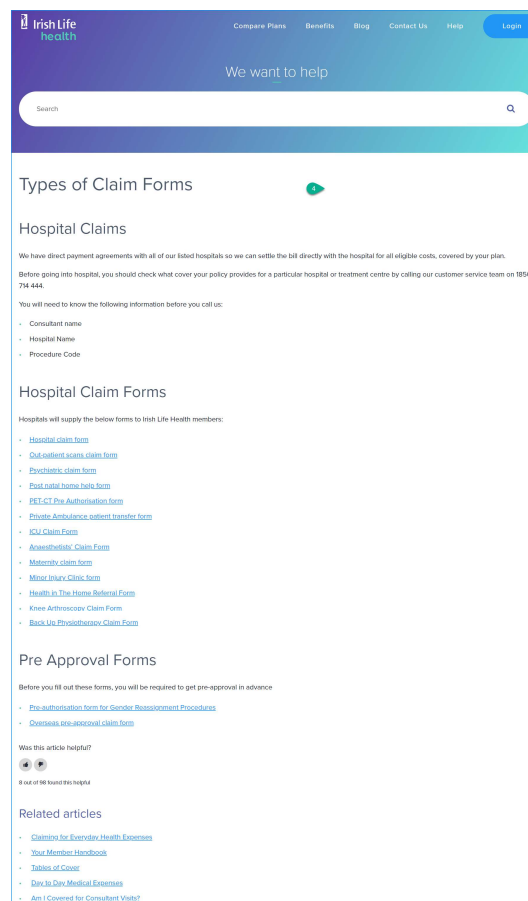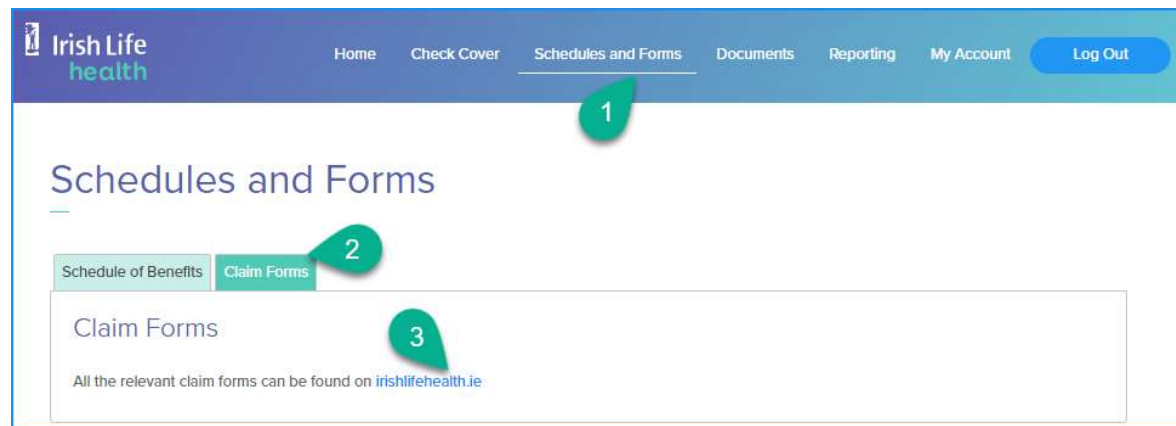
10 Documents

The Documents menu displays documents from the last 12 months.

To view older documents, use the dates filter and the Search box to filter withing the results.

1. The screen will auto-populate with the date one year ago in the Period From field and today's date in the Period To field.
2. If you click Search, all remittance letters issued to you in the last year will be available to view.

3. Enter Search criteria, for e.g., 2020 in the Search box to find all letters, in the last 12 months dated 2020.

Name	Date	
	Q 2020	
Your Payment	19/12/2020	view
Your Payment	28/11/2020	view
Your Payment	24/11/2020	view
Your Payment	03/11/2020	view
Your Payment	29/10/2020	view
Your Payment	24/10/2020	view
Your Payment	24/09/2020	view
Your Payment	30/08/2020	view
Your Payment	24/08/2020	view
Your Payment	03/08/2020	view

4. Or, change the Date From and Date To fields, and
5. Click Search to find letters issued within a specific date range.

Period From

4 28/06/2019

Period To

28/06/2021   5 Search

Prev		JUNE 2019				Next
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

11 Health Provider Reports

When you click the View Reports button on the home page, you will be routed to the Reporting page.

Alternatively, you can click the Reporting menu option.
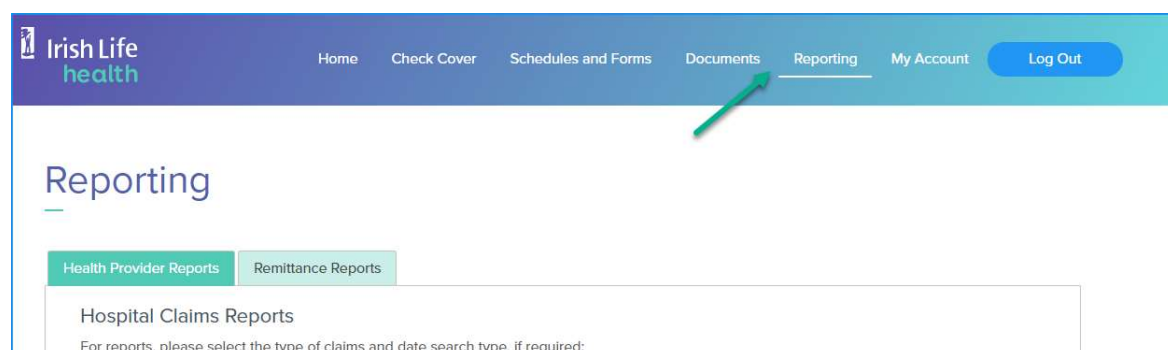
If you click the Claim Type dropdown list, you will see the different reports available to users:

    a. Claim Paid,
    b. Pending,
    c. Declined,
    d. Cancelled, and
    e. All Claims

Important note:

If a report includes a Claim Paid date field, this date is dynamic and can change. This date will initially be the aggregation date but may change if a clawback is applied to the claim. In this scenario, the Claim Paid date will update to the date the claw back was applied.

This is important to remember when entering a date to search by. If a claim has a claw back applied to it and you search for the claim, you will only find it by the claw back date as the claim paid date.

11.1 The Claim Paid Report by Admission Date

1. Click the Claim Paid Claim Type
2. Click Admission Date
3. Enter an Admission Date
4. Click Get Claims Report

5. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
6. The Copy button allows you to copy and paste the report data to another programme.
7. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.
8. The Show entries dropdown gives you the ability to choose the number of rows displayed on the screen.
9. The Search box allows you to enter data that will filter the results in the table.

In all paid reports the following information is included

- PWST Amount paid on the invoice / line item.
- Shortfall Amount and Shortfall Reason – where applicable.
- If a Claw Back has been applied to a line item, the report shows both the Claw Back Amount and Clawed Back Date.

11.2 The Claim Paid Report by From / To Date – Specific Date

This report allows you to run a report for claims paid in a specific date range.

1. Click the Claim Paid Claim Type
2. Click From/To Date
3. Select Date Format DD/MM/YYYY
4. Enter a From Date and a To Date
5. Click Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.
9. The Show entries dropdown gives you the ability to choose the number of rows displayed on the screen.
10. The Search box allows you to enter data that will filter the results in the table.

Claim Received	Claim Declined	Claim Paid	Member Number	Patient Name	Date of Birth	Claim Number	Admission Date	Dischar Date
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-11-19	N/A	2021-02-24	2197626	Wxvplr, Zkmwlan	1939-05-01	3807324	2020-09-27	2020-10-0'
2020-12-04	N/A	2021-02-24	1231234	Ofeut, Clkd	1973-03-01	3847417	2020-11-18	2020-11-18

Showing 1 to 10 of 2,894 entries   Previous 1 2 3 4 5 ... 290 Next

In all paid reports the following information is included

- PWST Amount paid on the invoice / line item.
- Shortfall Amount and Shortfall Reason – where applicable.
- If a Claw Back has been applied to a line item, the report shows both the Claw Back Amount and Clawed Back Date.

PWST Amount	Shortfall Amount	Shortfall Reason	Last Activity Date	Claim Status	Claw Back Amount	Clawed Back Date
€37.89	€0.00		2021-05-07	Paid	€-0.00	N/A
€18.19	€0.00		2021-03-29	Paid	€-0.00	N/A

11.3 The Claim Paid Report by From / To Months

This report allows you to run a report for claims paid by monthly date range/s.

1. Click the Claim Paid Claim Type
2. Click From/To Date
3. Select Date Format MM/YYYY
4. Enter a From Month and Year and a To Month and Year

Note: the From date will be calculated as the **first** of the chosen month and the To date the **last** day of the chosen month.

5. Click Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portzal.
9. The Show entries dropdown gives you the ability to choose the number of rows displayed on the screen.
10. The Search box allows you to enter data that will filter the results in the table.

In all paid reports the following information is included

- PWST Amount paid on the invoice / line item.
- Shortfall Amount and Shortfall Reason – where applicable.
- If a Claw Back has been applied to a line item, the report shows both the Claw Back Amount and Clawed Back Date.

Important note

In the Paid reports, Clawbacks carried out in the period are included and may appear as payments.

The way to identify these in this view is to look for a date in the Clawback Date column. A line item with a date in this column is a clawback, not a payment. Once you export the report into Excel you can filter and exclude these in Excel so that you can access an accurate paid total.

11.4 The Pending Report

1. Choose the Claim Type to Pending

Note: that for this report type, you do not need to specify a date. All claims with the status 'Pending' will be returned in this report.

2. Click Get Claims Report.

3. The results show in a table which may span several pages. Scroll right to see the columns of data included for each line item returned.
4. You can Search for a specific record by using the Search result.
5. The Copy button allows you to copy and paste the report data to another programme.
6. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.

In the pending report the following information is included

- Shortfall Amount and Shortfall Reason – which shows the reason why the claim is currently pended.
- The Last Activity Date and Claim Status columns are also useful columns in this report.

11.5 The Declined Report by Admission Date

This report shows declined claims for the consultant selected by Admission Date.

1. Choose the Claim Type as Declined
2. Click Admission Date
3. Enter the Admission Date
4. Click Get Claims Report

5. The results show in a table which may span several pages. Scroll right to see the columns of data included for each line item returned.
6. You can Search for a specific record by using the Search result.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.

In the declined report the following information is included

- The Invoice Amount versus the Payable Amount and any applicable PWST Amount applied.
- Shortfall Amount and Shortfall Reason – which shows the reason why the claim is declined.

Invoice Amount	Unit Charge	Unit Count	Charge Total	Payable Amount	PWST Amount	Shortfall Amount	Shortfall Reason
€152.39	€152.39	1	€0.00	-€30.48	€30.48	€152.39	Declined
€90.97	€90.97	1	€90.97	€0.00	€0.00	€90.97	Insufficient Information - no patient signature

11.6 The Declined Report by From / To Date – Specific Date

This report allows you to run a report for declined claims for a specific date range.

1. Click the Declined Claim Type
2. Click From/To Date
3. Select Date Format DD/MM/YYYY
4. Enter a From Date and a To Date
5. Click Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.
9. The Search box allows you to enter data that will filter the results in the table.

In the declined report the following information is included

- The Invoice Amount versus the Payable Amount and any applicable PWST Amount applied.
- Shortfall Amount and Shortfall Reason – which shows the reason why the claim is declined.

Invoice Amount	Unit Charge	Unit Count	Charge Total	Payable Amount	PWST Amount	Shortfall Amount	Shortfall Reason
€152.39	€152.39	1	€0.00	-€30.48	€30.48	€152.39	Declined
€90.97	€90.97	1	€90.97	€0.00	€0.00	€90.97	Insufficient Information - no patient signature

11.7 The Declined Report by From / To Months

This report allows you to run a report of declined claims by monthly date range/s.

1. Click the Declined Claim Type
2. Click From/To Date
3. Select Date Format MM/YYYY
4. Enter a From Month and Year and a To Month and Year

Note: the From date will be calculated as the **first** of the chosen month and the To date the **last** day of the chosen month.

5. Click Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.
9. The Search box allows you to enter data that will filter the results in the table.

In the declined report the following information is included

- The Invoice Amount versus the Payable Amount and any applicable PWST Amount applied.
- Shortfall Amount and Shortfall Reason – which shows the reason why the claim is declined.

Invoice Amount	Unit Charge	Unit Count	Charge Total	Payable Amount	PWST Amount	Shortfall Amount	Shortfall Reason
€152.39	€152.39	1	€0.00	-€30.48	€30.48	€152.39	Declined
€90.97	€90.97	1	€90.97	€0.00	€0.00	€90.97	Insufficient Information - no patient signature

11.8 The Cancelled Report by Admission Date

This report shows cancelled claims for the consultant selected by Admission Date.

1. Choose the Claim Type as Cancelled
2. Click Admission Date
3. Enter the Admission Date
4. Click Get Claims Report

5. The results show in a table which may span several pages. Scroll right to see the columns of data included for each line item returned.
6. You can Search for a specific record by using the Search result.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.

11.9 The Cancelled Report by From / To Date – Specific Date

This report allows you to run a report for cancelled claims for a specific date range.

1. Click the Cancelled Type
2. Click From/To Date
3. Select Date Format DD/MM/YYYY
4. Enter a From Date and a To Date
5. Click Get Claims Report

Hospital Claims Reports

For reports, please select the type of claims and date search type, if required:

Claim Type

1 | Cancelled ⌄

Search Type

○ Admission Date

2 ● From/To Dates

Date Format

3 ● DD/MM/YYYY

○ MM/YYYY

From/To Dates

From:

01/01/2021

4 To:

01/06/2021

5 Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Search box allows you to enter data that will filter the results in the table.
8. The Copy button allows you to copy and paste the report data to another programme.
9. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.

11.10 The Cancelled Report by From / To Months

This report allows you to run a report for cancelled reports by monthly date range/s.

1. Click the Cancelled Claim Type
2. Click From/To Date
3. Select Date Format MM/YYYY
4. Enter a From Month and Year and a To Month and Year

Note: the From date will be calculated as the **first** of the chosen month and the To date the **last** day of the chosen month.

5. Click Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.
9. The Search box allows you to enter data that will filter the results in the table.

11.11 The All Claims Report by Admission Date

This report shows all claims for the consultant selected by Admission Date.

1. Choose the Claim Type as All Claims
2. Click Admission Date
3. Enter the Admission Date
4. Click Get Claims Report

5. The results show in a table which may span several pages. Scroll right to see the columns of data included for each line item returned.
6. You can Search for a specific record by using the Search result.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.

11.12 The All Claims Report by From / To Date – Specific Date

This report allows you to run a report to show all claims for a specific date range.

1. Click the All Claims Claim Type
2. Click From/To Date
3. Select Date Format DD/MM/YYYY
4. Enter a From Date and a To Date
5. Click Get Claims Report

Hospital Claims Reports

For reports, please select the type of claims and date search type, if required:

Claim Type

1   All Claims ▾

Search Type

   ◯ Admission Date

2   ◉ From/To Dates

Date Format

3   ◉ DD/MM/YYYY

   ◯ MM/YYYY

From/To Dates

From:

01/07/2020

4   To:

30/08/2020

5   Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Search box allows you to enter data that will filter the results in the table.
8. The Copy button allows you to copy and paste the report data to another programme.
9. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.

11.13 The All Claims Report by From / To Months

This report allows you to run a report for all claims for monthly date range/s.

1. Click the Cancelled Claim Type
2. Click From/To Date
3. Select Date Format MM/YYYY
4. Enter a From Month and Year and a To Month and Year

. **Note:** the From date will be calculated as the **first** of the chosen month and the To date the **last** day of the chosen month.

5. Click Get Claims Report

6. The report results will be displayed in a table. Scroll right to see all of the columns inclued in the report.
7. The Copy button allows you to copy and paste the report data to another programme.
8. The Excel button allows you to download the data in an Excel spreadsheet outside of the portal.
9. The Search box allows you to enter data that will filter the results in the table.

12 Remittance Reports

To find and download Remittance Reports, click the Reporting menu from the home page,

Click the Reporting menu option.
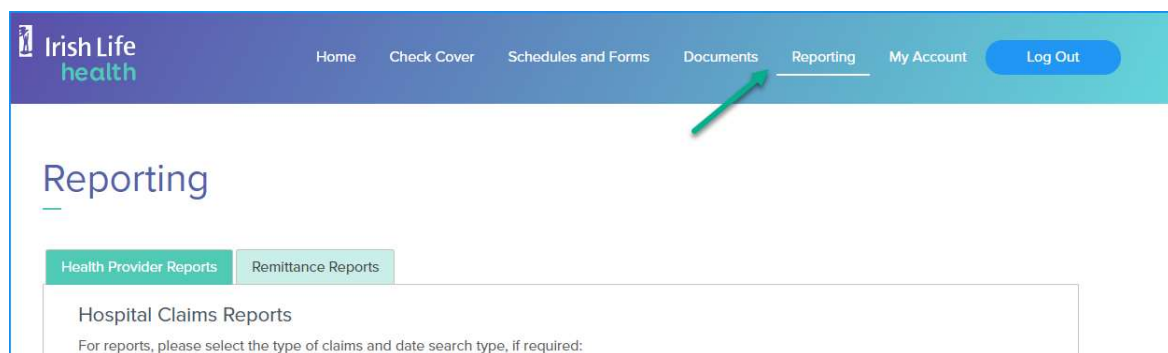
Then click the Remittance Reports tab.
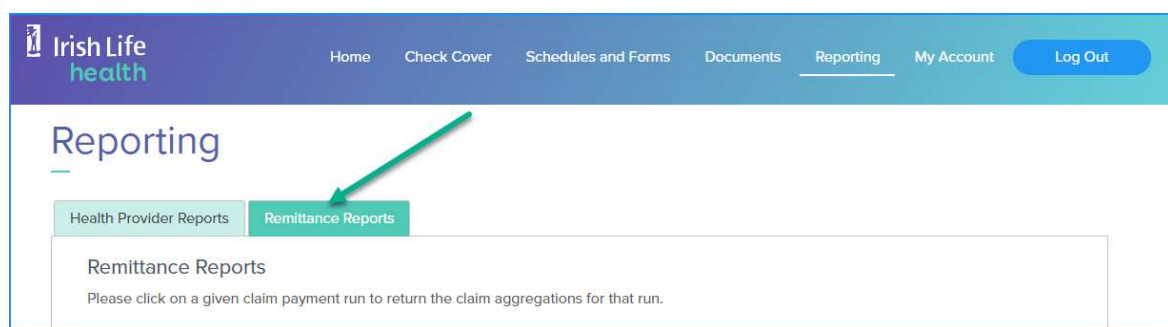
Click a From and To Date to access a report for that claim payment run:

1. When you select a month in the From section, the system will apply the first as the start day of that month.
2. When you select a month in the To section, the system will apply the last day of that month as the end date for the report items.

    So, to view a report for any aggregation dates in January 2021 for example, choose Jan as the From and To months.

3. Click Get Claim Payment Runs to generate the report table.

Remittance Reports

Please click on a given claim payment run to return the claim aggregations for that run.

From/To Dates

Note the From date will be calculated as the first of the chosen month and the To date the last day of the chosen month.

From:

January   1 ← This will be the first of the month.

2021

To:

January   2 ← This will the last day of this month

2021

Get Claim Payment Runs   3

4. The high level view of the claim payment report for the period specified displays as a table.
5. You have the ability to Copy the information in the table to another application outside of the portal.
6. You can also export the report to Excel, or
7. Download it as a PDF.
8. You can Search within results in this view where needed.
9. Click the Detail button to access the individual payments that make up this claim payment report.
10. At this level, you can view the total payment amount for this payment run. The individual claims that make up this total can be accessed using the Detail view.

1. The detailed view shows the individual claims that make up the payment run. Included in this view is the Patient Name, Claim Number, Your Reference, Invoice Date, Paid Amount and PSWT deduction (where relevant).
2. You again have the ability to Copy the data or export to Excel or as a PDF.
3. You can increase the number of items in the view up to 100, or
4. Click Next to see more entries.
5. Important: if a Paid Amount appears as a negative amount (e.g. €-140.00), this indicates that there has been a clawback processed on an invoice.

13 My Account

13.1 User Management

From the My Account menu, you can manage your users and view your own details.
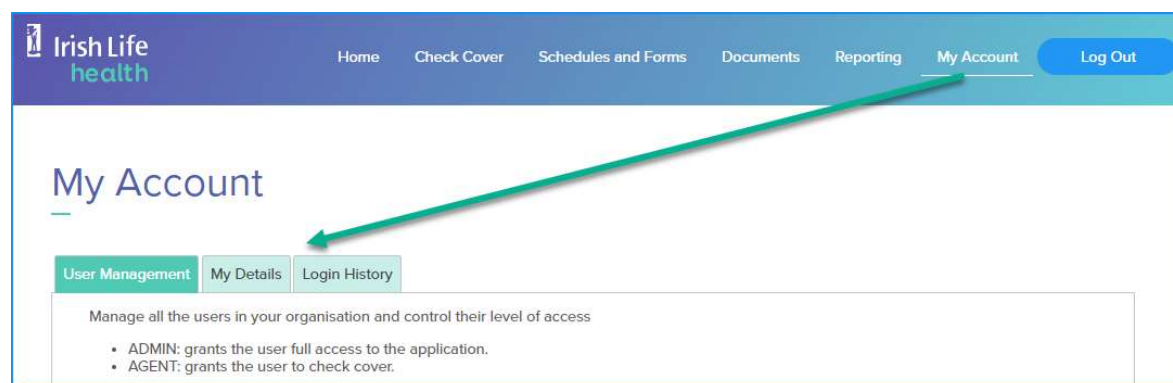
With the User Management tab selected, you can search for existing users, update an existing user's details and/or create a new user.

13.1.1 To search for users

1. Click the User Management tab.
2. Enter a name or email address, and
3. Role, and
4. Click Search.

The Reset button clears the search criteria.

13.1.2 To change a user's role or deactivate a user

1. Click the user you would like to update.
2. The update role window opens. Click the role you would like to update the user to (i.e., either admin or agent).
3. Click the Update button to save the change to the user's role, or
4. Click the Deactivate button to remove the user from the portal, or
5. Click the Cancel button to cancel making changes.

A message will appear showing the change.

Update User Role
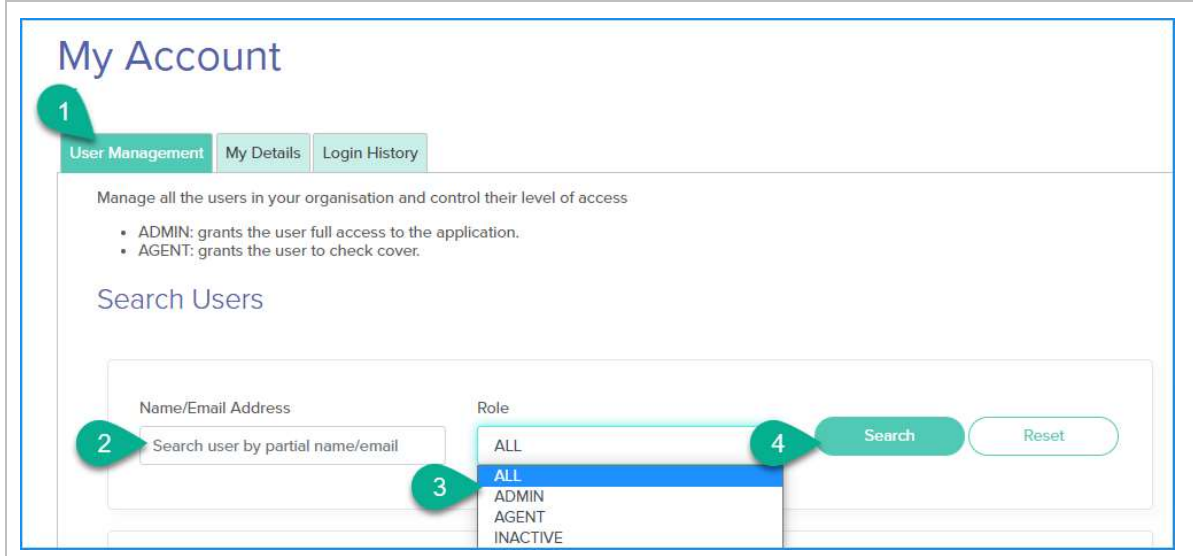
Agent ▢▢▢ ▢▢▢   [AGENT]

● ▢▢ ▢▢▢   [ ]

«   »

Update role (agent▢▢ ▢ ▢▢)

○ ADMIN   1

● AGENT

Admins will have access to everything while Agents will just have access to check cover.   2 → Update

3 → Deactivate

4 → Cancel
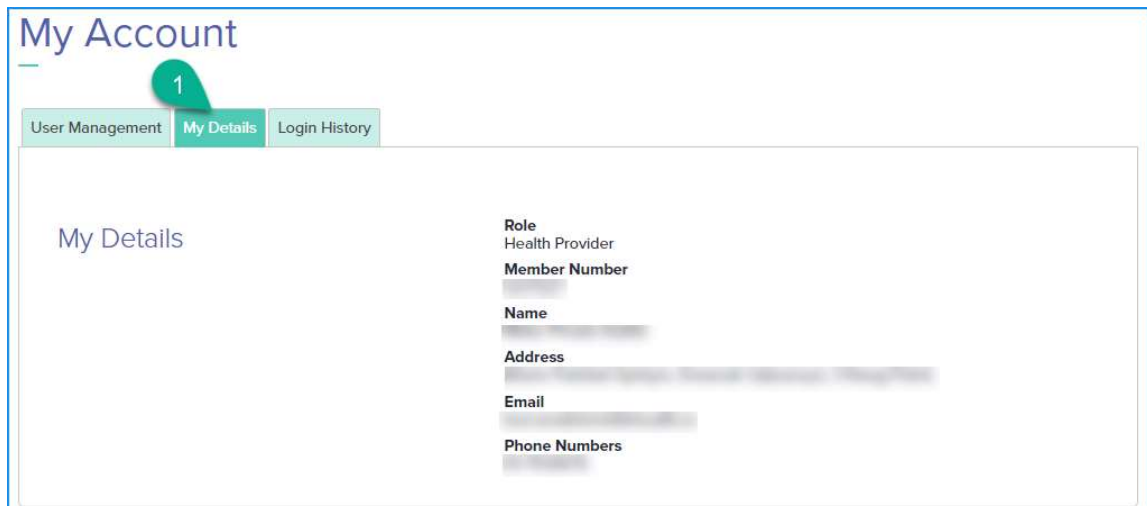
The user '▢▢▢▢▢▢▢' role has been removed.

Very important note:

If the main admin user for a provider changes, the new administrator will need to contact partner support to update our system records with the email address of the new admin user. This new admin user will be able to register on the portal once we have a record of their email address in our system and can deactivate the previous admin user's account within the portal.

13.2 My Details

1. The My Details tab shows your own details including your Role (Health Provider), your Provider Member Number, your Member Name and Address and other contact details.

Notice that, if the user is associated with a billing agency, that two sets of contact information (see the email address field in this example) will show; both the user logged in and the billing agency associated with the user.

13.3 Login History

1. The Login History tab shows your Recent Logins.

My Account

| User Management | My Details | Login History |

Recent Logins

- 15/06/2021 07:57
- 15/06/2021 07:51
- 14/06/2021 15:11
- 10/05/2021 13:59
- 12/04/2021 15:16
- 12/04/2021 15:09
- 31/03/2021 14:50
- 05/03/2021 12:13
- 05/03/2021 10:35
- 05/03/2021 08:06

14 Troubleshooting

1.	**I get an error message when I try to view a policy.**

This error usually indicates that you do not have access to view the policy.

Contact us and we can try to help you resolve this issue.

Error.

An error occurred while processing your request.

Error while attempting to retrieve details for vivw545653. Check that you have access to view this policy, please contact Irish Life Health.

2.	**I entered the incorrect password a few times and seem to be locked out of the portal.**

This may happen if you enter the incorrect password more than 5 times.

This will lock you out of the portal for about 15 minutes.

If you have forgotten your password, rather use the Forgot Password option to create a new password.

If the problem persists, please contact us and we will help you gain access again.

3.	**For all queries about the provider portal:**

partnersupport@irishlifehealth.ie