

## eServices Registration Video Transcript

### **Title Screen**

Hello and thank you for joining Palmetto GBA for an overview of the eServices Online Provider Portal. This video will focus on the functions of eServices, how to register and the role of the provider administrator.

### **Functions of eServices Screen**

To begin, eServices is a free, provider self-service application. Palmetto GBA's goal is to give providers fast and secure access to their Medicare information seamlessly via an Internet-based portal.

The portal provides access to such services as:

- Beneficiary Eligibility
- Claim Status
- Claim Submission and Reopening Requests (Part B)
- Access to Remittances Advices
- Financial Information and Forms
- Submission of Responses
  - Medical Review Requests
  - Appeals
- Electronic Mail
- Complex Medical Review results

We will focus more on these individual services in later modules.

### **Participation Screen**

All you have to do participate in eServices is have an Electronic Data Interchange Enrollment Agreement on file with Palmetto GBA and have received payments in the past.

So let's begin the registration process. From your line of business' homepage, you can select "eServices" at the top of the screen, under the "Topics" header or via the "eServices" icon on the right side of the screen. You may also directly access eServices by entering its web address, [www.palmettogba.com/eServices](http://www.palmettogba.com/eServices), in your Internet browser search field.

It is very important to remember that the person who initially registers for eServices will automatically become the provider administrator. Once an administrator from your office has registered, they are the one who can add and remove users, including adding additional administrators. You will need to contact your administrator for access to eServices.

### **eServices Home Page Screen**

After you select any of the "eServices" links, you will be directed to the homepage. From the homepage, you may login, register or find out more about eServices by selecting the "I want to learn more" link underneath the "Register Now" button. By selecting "learn more", you will be directed to

## eServices Registration Video Transcript

eServices' user manual, which will provide you with all the details of eServices, including the registration process.

### **Registration Screen**

After selecting "Register Now", you will need to enter the information that is requested. This will include:

- The name and contact information of the person applying for access
- The provider name and identifiers such as the PTAN, NPI and Tax ID
- You will need to enter the most recent Medicare payment amount received
- Any billing service information, if you use one

After entering your information, you must also agree to the Terms of Use. If you have entered any registration information in an incorrect format, the eServices application will display an error message in red at the top of the screen. Carefully read that error message and enter the information again.

If the information you enter matches the information on file with Palmetto GBA, you will be able to choose a password along security questions and answers.

### **Validation Screen**

Once this is completed, you will receive a registration email. You must access the email and click on the validation link. If you do not click on the validation link and you try to log in, you will be directed to the profile screen where you can update or correct your email address and resubmit.

If your email address is correct, you may click on the link to request a new email. Please make sure your email address is correct on your profile before calling Palmetto GBA for assistance.

### **Multi-Factor Authentication (MFA) Screen**

To enhance the security of Medicare data, CMS requires the use of multi-factor authentication when logging in to eServices. After you successfully enter your user name and password, you will be directed to the MFA verification screen where you will need to enter a verification code to complete the login process.

Once on this screen you will be prompted to select a method to receive your MFA code. You may elect to either receive a text if a mobile phone number was entered in your profile, or by email. All users will have the option to receive their code via email by default.

### **Provider Administrator Screen**

As discussed earlier, the person who registers is the provider administrator. Only administrators have access to the Admin tab. Through this tab, they can grant access to users and additional administrators.

Administrator responsibilities include:

## eServices Registration Video Transcript

- Creating users and administrators
- Assigning temporary passwords for users
- Assigning application permissions for users
- Modifying user profiles
- Terminating users or administrators

Any access granted and maintained by the administrator is the sole responsibility of the administrator. Palmetto GBA has no responsibility for maintaining provider user access and permissions assigned to them by the administrator.

### **Create New User Screen**

From the Create New User screen, an administrator may grant user permissions or give administrative rights. Keep in mind that an administrator has access to all functions of eServices, including the ability to modify or delete the original provider administrator.

When creating a new user, the administrator will receive the user's ID and create a temporary password. The administrator is then responsible for giving the user their user ID and password.

If you are an administrator and are leaving the office, or are no longer functioning as the administrator, you must assign an additional administrator before leaving the role. Once a new administrator is assigned, he or she can log in and delete the old administrator or change the administrator to a provider user. We highly recommend having back-up administrator at all times.

### **Closing Screen**

This concludes today's presentation in which we reviewed the basics of eServices, how to enroll and the responsibilities of the administrator. For more information about eServices, please click on the "Resources" link located in the top right corner of the screen. We thank you for watching and have a great day!