




🔗 Indicates items with a linked user guide
For additional resources, [please visit the Portal FAQ page.](#)

| Term or Feature Description | | Where is it located in the CBH Provider Portal? |
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| Claims | Search and view claims by date of service, processed date, member, provider, medical group and status. | <ul style="list-style-type: none"> ➔ Claims information is not available to provider users via the Provider Portal currently. Members have access to claims history (2016-present) via the CBH Member Portal. |
| Access to Portal | In-network providers have identified Provider Administrators who have been configured by CBH Portal Administration to have access to the CBH Provider Portal via Okta login. For support with access, contact | <ul style="list-style-type: none"> ➔ Via Okta Login ➔ Contact your Office Administrator ➔ Contact your CBH Provider Relations Representative |
| Code Lookup | A portal resource for searching codes related to diagnoses, procedures (CPT codes and CBH Levels of Care), drugs, and modifiers. | <ul style="list-style-type: none"> ➔ Office Management menu |
| Document Manager | Securely exchange documents between users or groups within the portals. Users can access documents shared with them, download, archive, and upload materials. | <ul style="list-style-type: none"> ➔ Office Management menu ➔ |
| 🔗 Eligibility | View a member's eligibility and benefit details by entering their identifying information. Once a member is selected, Provider staff can view and download that member's benefits and eligibility history. Note: CBH offers one benefit plan: CBH Medicaid. Third-Party Liability (TPL) information is not available. | <ul style="list-style-type: none"> ➔ Office Management menu ➔ Widget on home screen ➔ Patient Management menu (once member is selected) |
| 🔗 Multi-Factor Authentication (MFA) | MFA is an added layer of security used to verify an end user's identity when they sign in to an application. Your email and password combination are the first factor for the CBH Provider Portal. The second must come from a mobile device-based application, such as Google Authenticator or Okta Verify, which will generate a unique code to enter on the computer. | <ul style="list-style-type: none"> ➔ External application on mobile device needed: ➔ Google Authenticator ➔ Okta Verify ➔ Microsoft Authenticator ➔ Others preferred by user |
| 🔗 Okta | A cloud-based Identity and Access Management (IAM) service that allows users to securely access applications across devices through a secure Single Sign On (SSO). Once access is created, Provider staff must configure Multi-Factor Authentication (MFA) for ongoing identity verification and Portal access. | <ul style="list-style-type: none"> ➔ https://login.oie.cbhphilly.org |

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|  Patient Management | Provides a “member pivot” or focused view of a specific member's information, including demographic/identifying details, contact information, benefits and eligibility, and authorizations. | <ul style="list-style-type: none"> ➤ Patient Management menu ➤ Additional options display once member is selected |
|  Provider Administrator | Staff within a provider organization, or independent practitioner, serving as the primary Portal contact and manager for other Provider users. Any additional users created through the Okta Portal Access tools will inherit the Administrator's CBH Parent ID number. | <ul style="list-style-type: none"> ➤ Role is displayed when users click on their name in the upper right corner of the Portal. |
| Referrals/Authorizations | Manage and view authorization and service referral requests, and approved authorizations. The screen provides a dashboard of reviewed requests and allows users to submit requests using the "New Request" button. Advanced search options enable users to find referrals and authorizations by patient (member), provider, request number, or requested service. | <ul style="list-style-type: none"> ➤ Office Management menu ➤ Widget on home screen ➤ Patient Management menu (once member is selected) |
|  Secure Messaging | Receive and send secure messages. CBH staff have access to their personal mailbox and the CBH administrative mailbox, which is monitored by portal administrators and superusers. | <ul style="list-style-type: none"> ➤ Message icon with envelope symbol. In the upper right corner of the Portal. |
| User | Any person who seeks or is given access to the Provider Portal to view, use, or share information with CBH. User access is limited by provider organization and role - a Provider User may only view information related to the assigned CBH Parent ID number. User activity may be monitored and access terminated if misused. | <ul style="list-style-type: none"> ➤ Users must be created in Okta by a CBH or Provider Administrator. |
| User Alias | Log in as provider user, view the portal and make limited real-time changes, such as modifying a setting or viewing content changes. | <ul style="list-style-type: none"> ➤ Available only to CBH support staff |