Office Portal User Guide

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Office Portal User Guide

Welcome to the Office Portal

LIBERTY Dental Plan ("LIBERTY") offers 24/7 real-time, no cost access to information and tools through our secure Office Portal. The portal features many useful and improved search tools and a more holistic view of member information that provides a more convenient way to connect with us at LIBERTY.

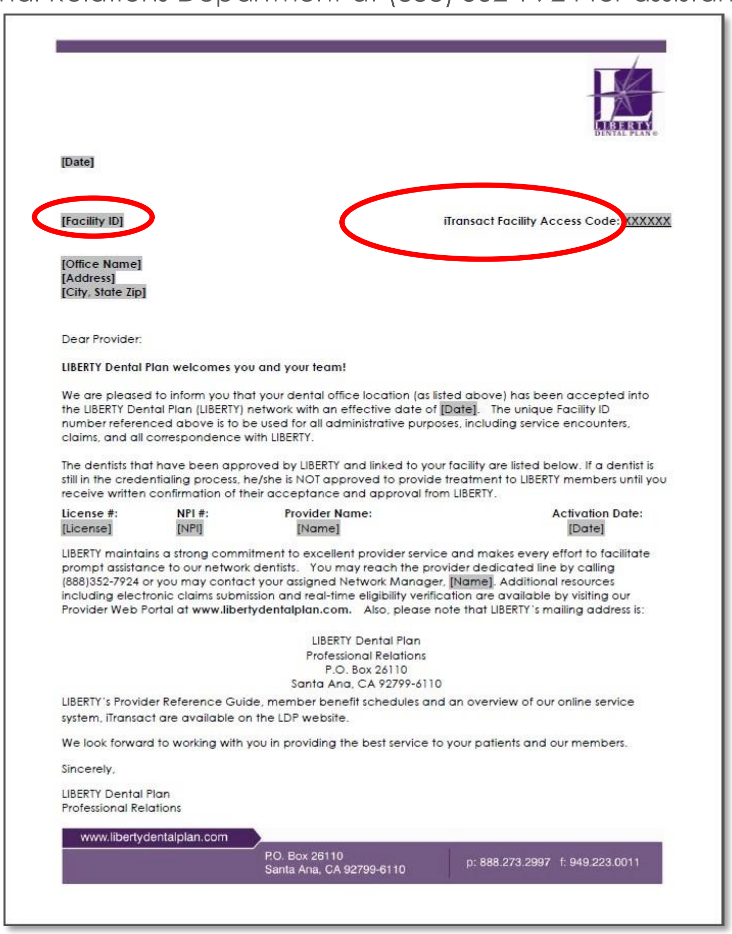
Getting Started

System Requirements

- Internet Connection
- (Compatible with Microsoft Edge, Firefox, Chrome, and Internet Explorer 11)
- Adobe Acrobat Reader

Office Number and Access Code

All contracted network dental offices are issued a unique **Office Number** and **Access Code**. These numbers can be found in your LIBERTY Welcome Letter and are required to register your office on LIBERTY's Office Portal. If you are unable to locate your Office Number and/or Access Code, please contact our Professional Relations Department at (888) 352-7924 for assistance.



[Date]

[Facility ID]

iTransact Facility Access Code: XXXXXX

[Office Name]
[Address]
[City, State Zip]

Dear Provider:

LIBERTY Dental Plan welcomes you and your team!

We are pleased to inform you that your dental office location (as listed above) has been accepted into the LIBERTY Dental Plan (LIBERTY) network with an effective date of [Date]. The unique Facility ID number referenced above is to be used for all administrative purposes, including service encounters, claims, and all correspondence with LIBERTY.

The dentists that have been approved by LIBERTY and linked to your facility are listed below. If a dentist is still in the credentialing process, he/she is NOT approved to provide treatment to LIBERTY members until you receive written confirmation of their acceptance and approval from LIBERTY.

License #:	NPI #:	Provider Name:	Activation Date:
[License]	[NPI]	[Name]	[Date]

LIBERTY maintains a strong commitment to excellent provider service and makes every effort to facilitate prompt assistance to our network dentists. You may reach the provider dedicated line by calling (888)352-7924 or you may contact your assigned Network Manager, [Name]. Additional resources including electronic claims submission and real-time eligibility verification are available by visiting our Provider Web Portal at **www.libertydentalplan.com.** Also, please note that LIBERTY's mailing address is:

LIBERTY Dental Plan
Professional Relations
P.O. Box 26110
Santa Ana, CA 92799-6110

LIBERTY's Provider Reference Guide, member benefit schedules and an overview of our online service system, iTransact are available on the LDP website.

We look forward to working with you in providing the best service to your patients and our members.

Sincerely,

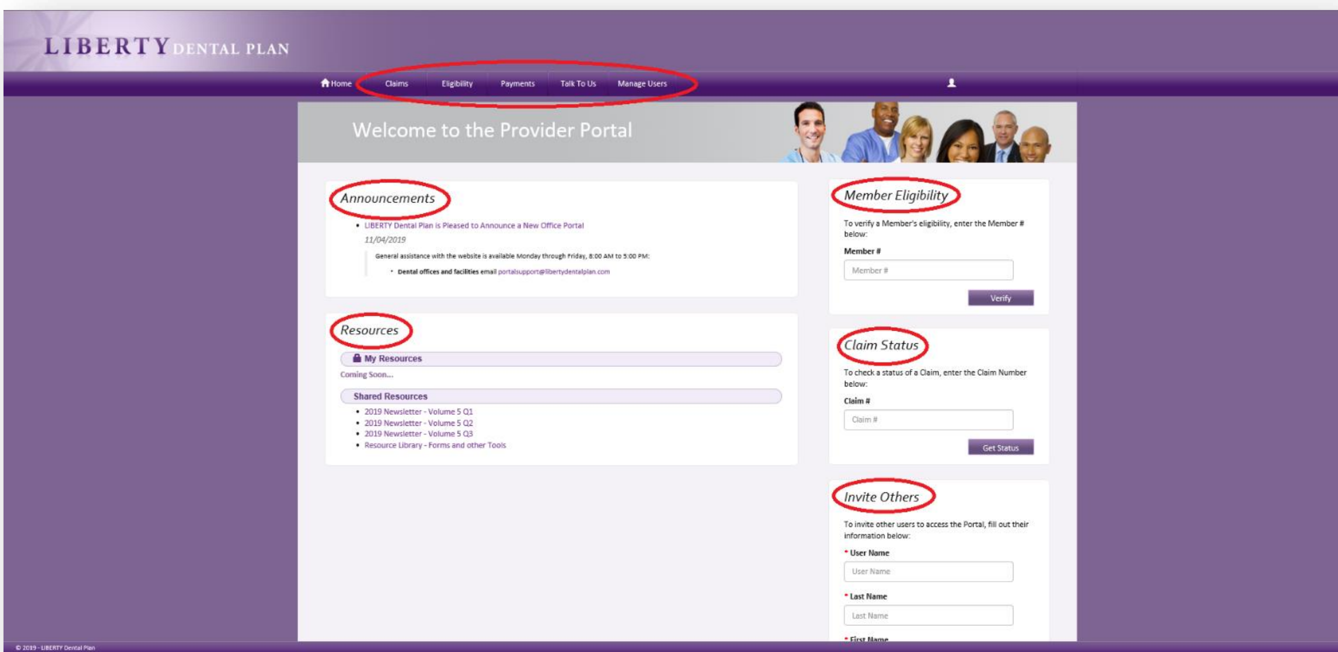
LIBERTY Dental Plan
Professional Relations

www.libertydentalplan.com
P.O. Box 26110
Santa Ana, CA 92799-6110
p: 888.273.2997 f: 949.223.0011

NEW Look: Home Page Features

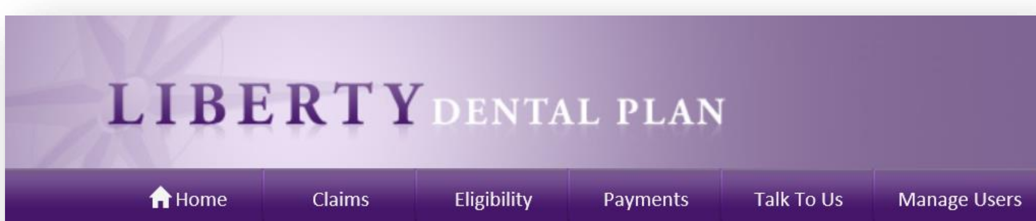
On the Office Portal landing page, you now have quick access to the following features:

- **Announcements:** view global LIBERTY announcements
- **Resources**
  - My Resources: view secure office specific documents (formerly "Attachments")
  - Shared Resources: view global/public documents
- **Member Eligibility**: ability to enter Member# with or without the suffix "-01, etc. "
- **Claims Status:** quick access to claims
- **Invite Others:** administrator access to setup new user(s)



The navigation buttons are now located horizontally on the top of the page. Hover over each selection to view options.

- Claims
- Eligibility
- Payments
- Talk To Us
- Manage Users



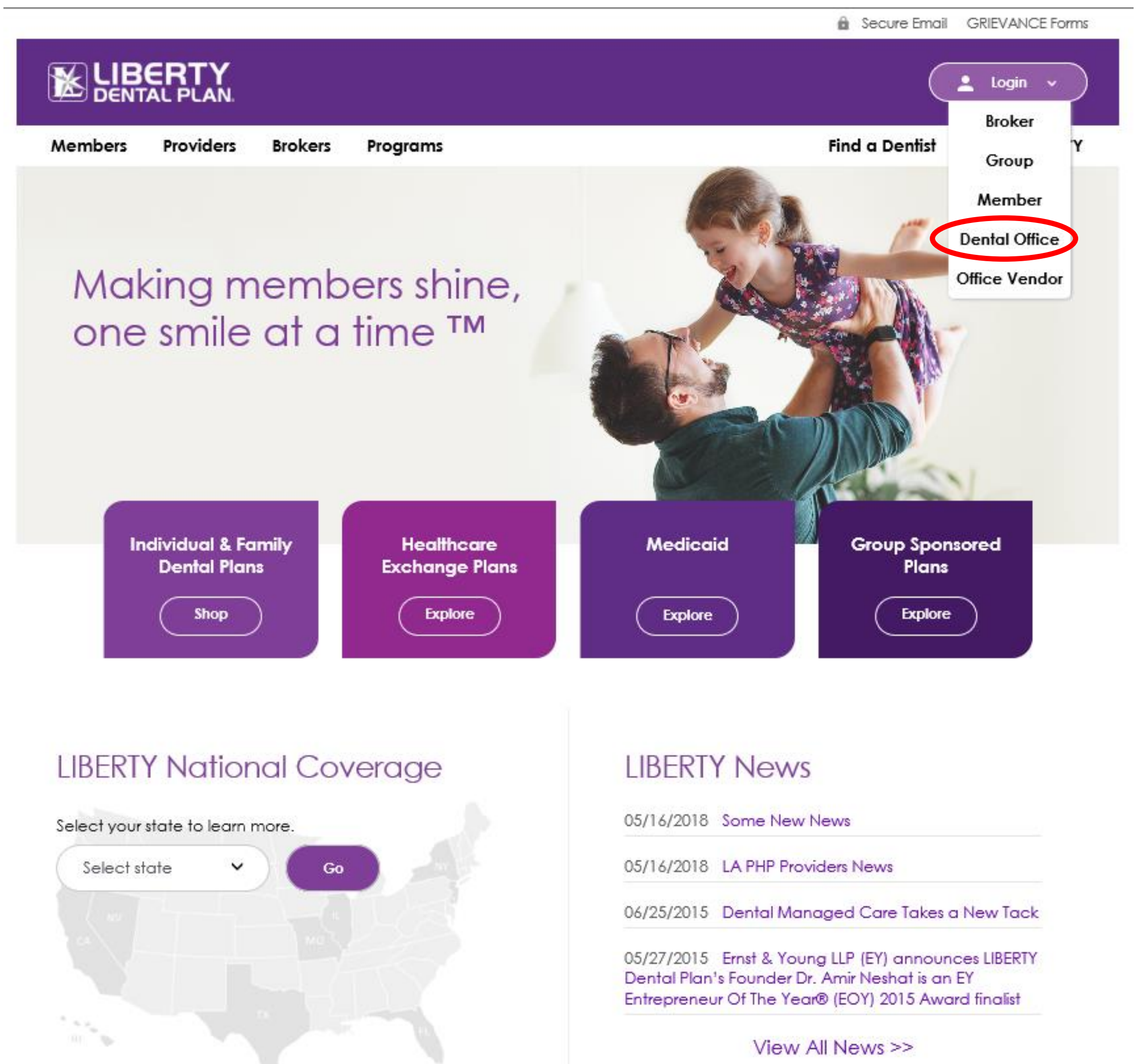
New Office Registration

Register a New Office

A designated Office Administrator should be the user to set up the account on behalf of all providers/staff. The Office Administrator will be responsible for adding, editing, and terminating additional users within the office.

1. To register a new office, enter the following website address into your browser: www.libertydentalplan.com

2. Click on **Login → Dental Office**



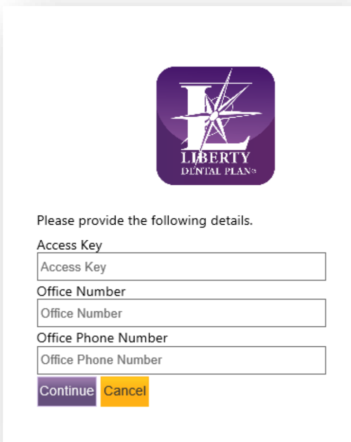
Register a New Office *continued*

3. Select **Office** from the drop-down menu as the **TYPE** of user
4. Create a Sign in name
   Note: The **Sign in Name** can contain any combination of letters, numbers, and special characters except for the following special characters: @, (,).
5. Enter Email Address
6. Select **Send Verify code** and then enter the verification code from the email address provided
7. Create New Password
   Note: The **Password** must be a minimum of 8 characters in length and contain at least 3 of the following: 1 uppercase letter, 1 lower case letter, 1 number and 1 special character. (!@#$%&*)
8. Create a User First Name and User Last Name
9. Check the box for **I'm not a robot**
10. Select **Continue**

Register a New Office *continued*

11. Enter Access Code, Office Number, and Office Phone Number

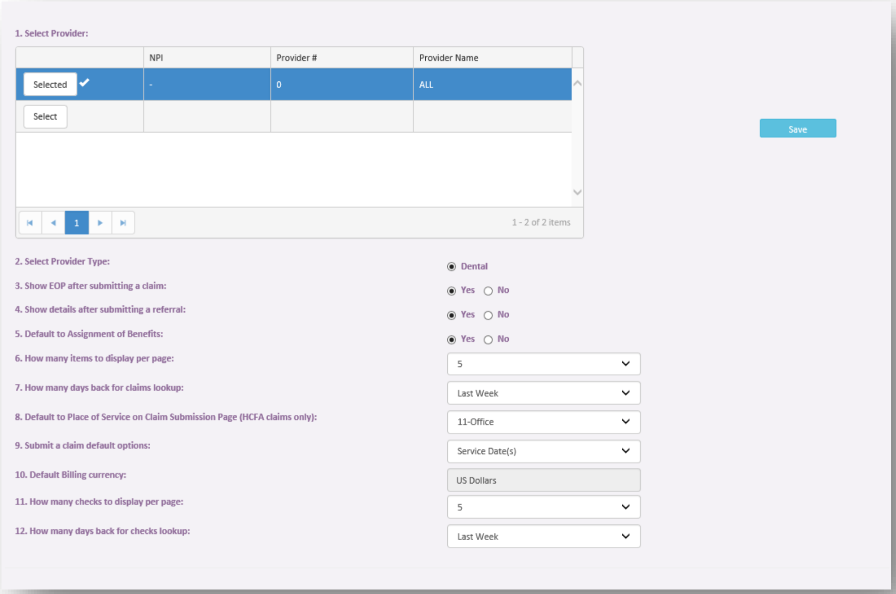
12. Select **Continue**



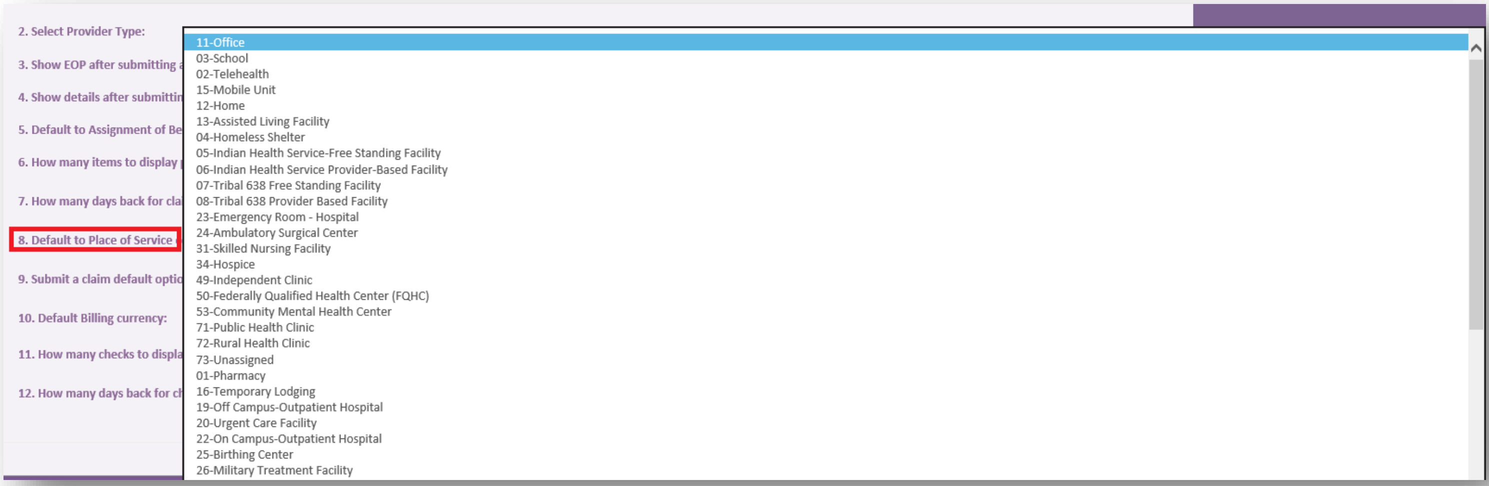
My Preferences

After initial set-up, the user will be directed to the **My Preferences** tab.

1. Select your office's various **Preferences**
   Note: The Evidence of Payment (EOP) is sent to providers and the Evidence of Benefits (EOB) is sent to members.

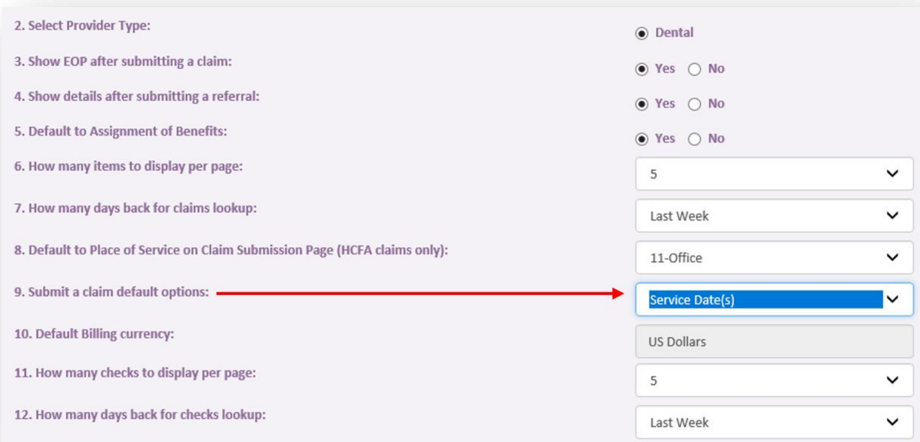


The Place of Service on Claim Submission page default is set to 11-Office. Another **Place of Service** can be selected as a default from the drop-down menu.



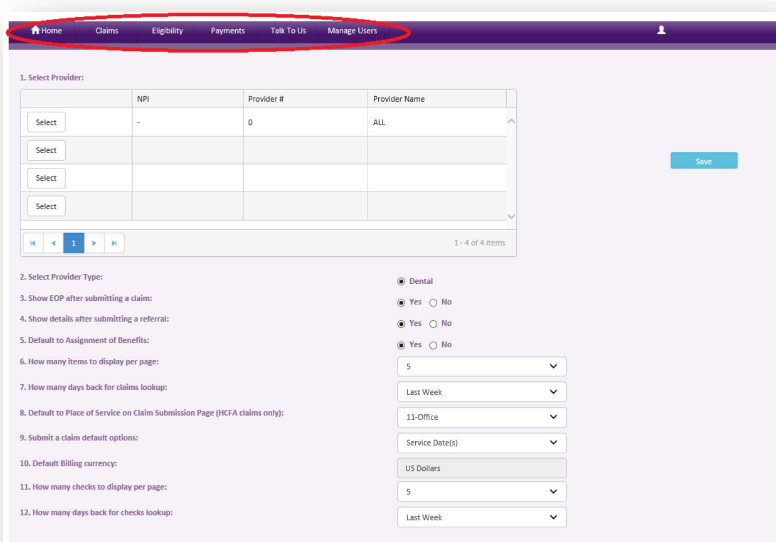
My Preferences *continued*

The **Submit a claim** default is set to Service Date(s). The date of service you enter for the first service line will automatically populate when you click in the Service Date box for any additional service lines entered when submitting a claim. (The steps on how to submit a claim, pre-estimate and referral will be explained in further detail; see page 27)



2. Click **Save**

Once your preferences have been saved, you will remain on the **Preferences** screen where you can select from the available drop-down features.

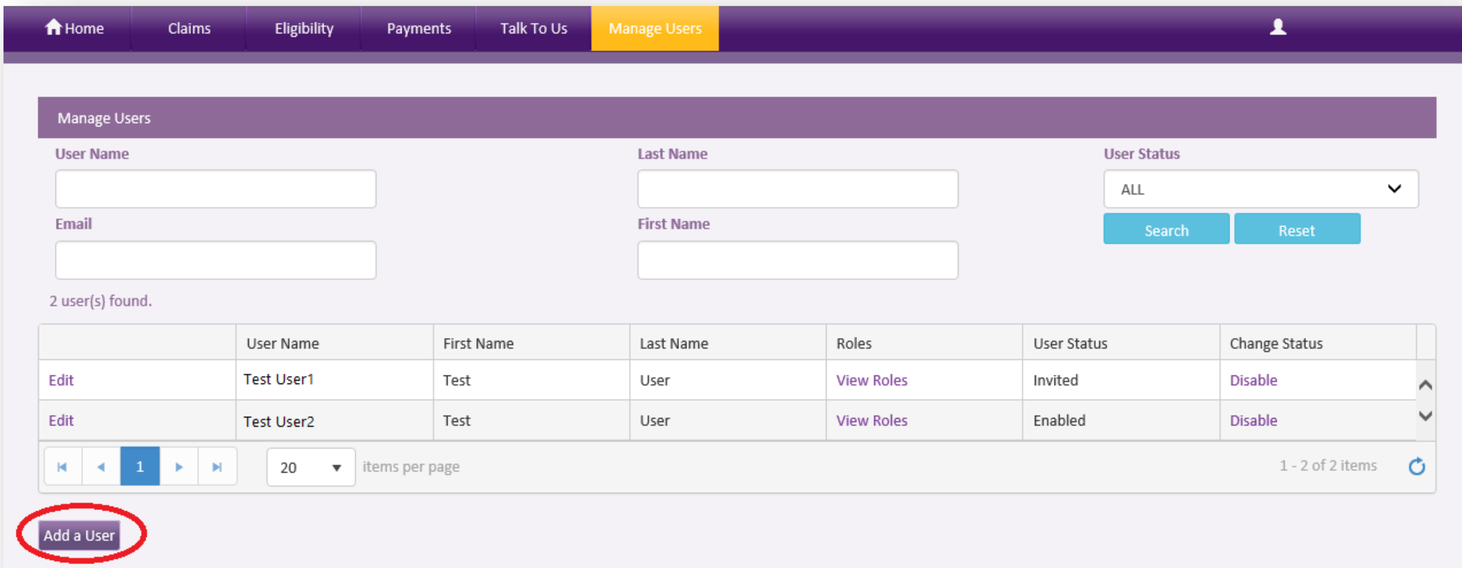


Your office's preferences can be updated at any time by hovering over your name in the top right corner and then clicking on the **My Preferences** option in the drop-down menu.

Add a New User

The Administrator can add additional users by:

1. Click **Manage Users** from the drop-down menu on the top of the screen

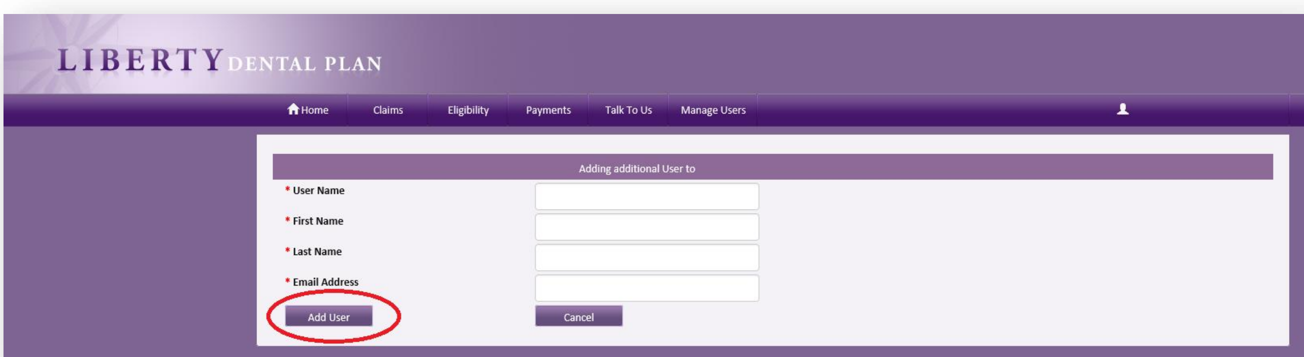


2. Click **Add a User**

   Note: All additional users must have their individual assigned User Name and Password. This will avoid multiple users being knocked off the portal due to the same User Name and Password.

3. Input a **User Name** (must be unique to the user), **First Name**, **Last Name and Email Address**. All fields marked with an asterisk (*) are required.

   Note: The user will receive an email notifying them to click on the link next to the text to create their password upon first log on attempt.

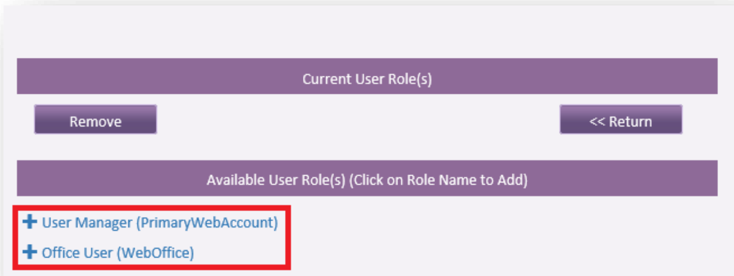


4. Click **Add User**

Set New User Roles

1. We recommend that you click on **Office User (WebOffice)** to grant the user access to view/submit claims and check eligibility. Once you click on each role in **Available User Role(s) (Click on Role Name to Add)**, the roles will move up to **Current User Role(s)**

2. Click **Return**



Note: The user must have a role mapped to be able to use the portal

Roles:

- **User Manager (PrimaryWebAccount)** – Allows the user to manage and add additional user accounts for the entire office. This includes resetting passwords, updating user information (First name, Last Name, Email Address), as well as disabling users in the event they should no longer have access to the account.

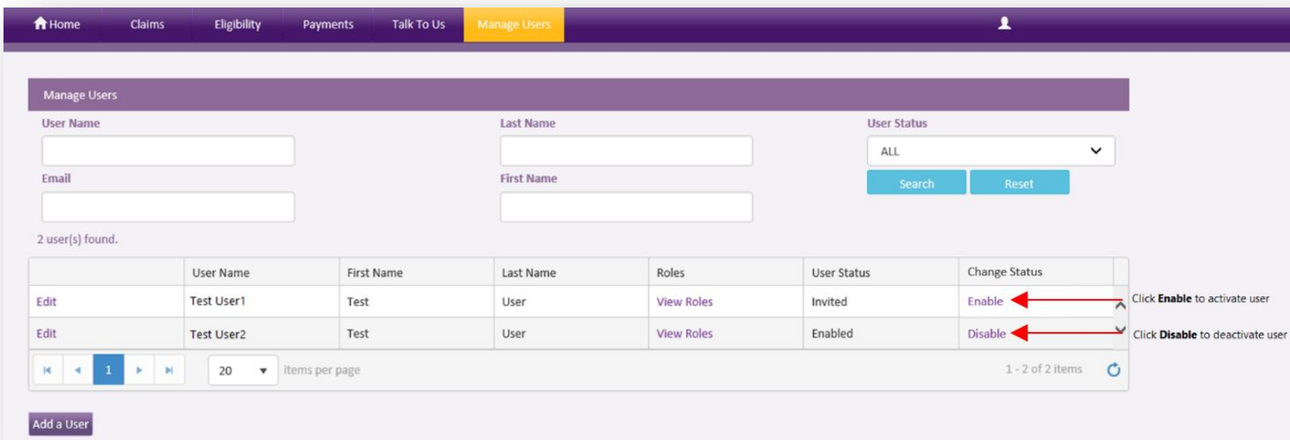
- **Office User (WebOffice)** – Allows access to all functionality on the portal, except limits access to "Manage Users" tab. The user would only have access to their account and no access to any other user accounts for that office.

Enable and Disable Users

Once a new user is set up, the Office Administrator has the ability to enable or disable their account.

1. Click on the **Manage Users** on the top of the screen
   - If the User Status is **Enabled**, the account is **activated**. To disable the account, click **Disable** under **Change Status**.

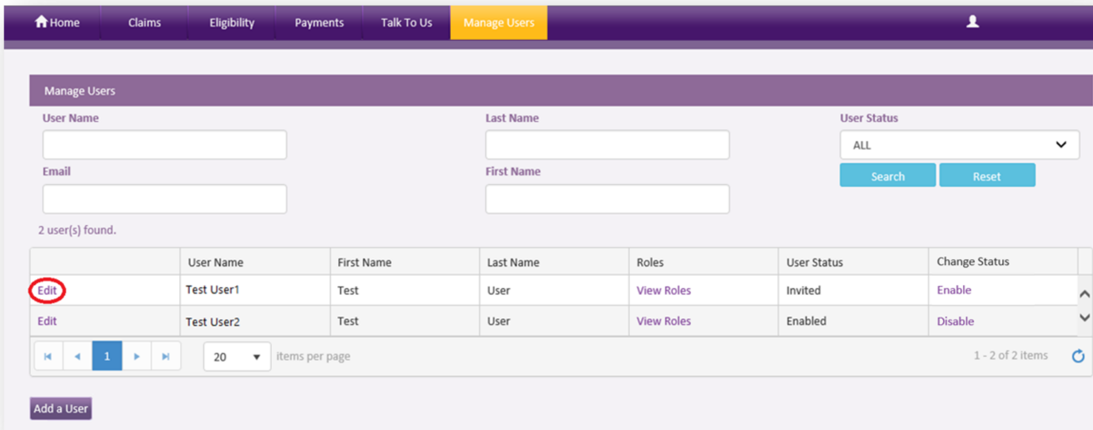
   If the User Status is **Disabled**, the account is not active. To reinstate the account, click **Enable** under **Change Status**.



Edit User Information

The Office Administrator can edit a user's information:

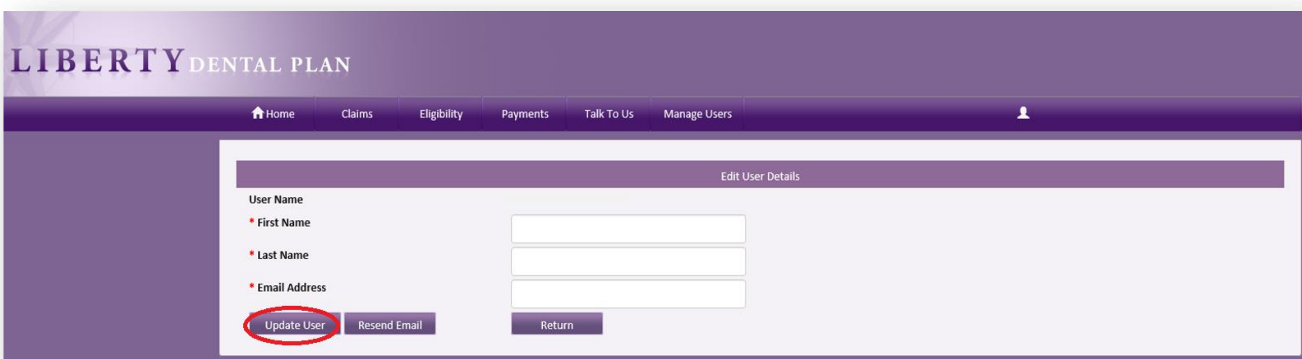
1. Click on the **Manage Users** on the top of the screen



2. Click **Edit** for the user you would like to edit
3. Update user information

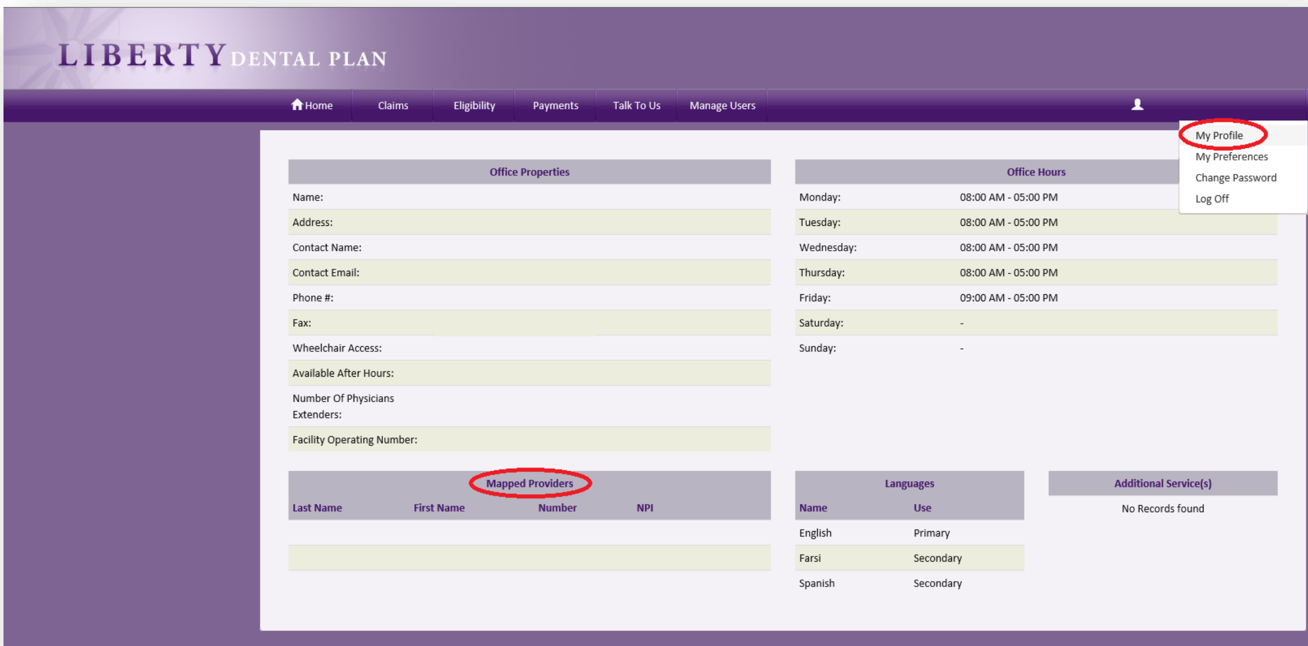
Note: All user information with an asterisk (*) can be edited.

4. Click **Update User**



My Profile

You can view your office's current business information by clicking on the **My Profile** on the top right side of the screen. Your current business information can be updated through the Provider Directory Information Verification (DIV) website at www.libertydentalplan.com/ProviderDIV



Mapped Providers

You can view a list of all the providers linked to your office in our system on the **Mapped Providers** section of the screen. If your office requires edits to a provider such as to add or terminate, you can request a provider change through the Provider Directory Information Verification (DIV) website at www.libertydentalplan.com/ProviderDIV. Your Professional Relations Network Manager will reach out to you for further details.

New: Providers with an "Active Contract" within the office will display. If a provider has termed, the provider will display for 6 months and then drop from the **Mapped Providers** screen.

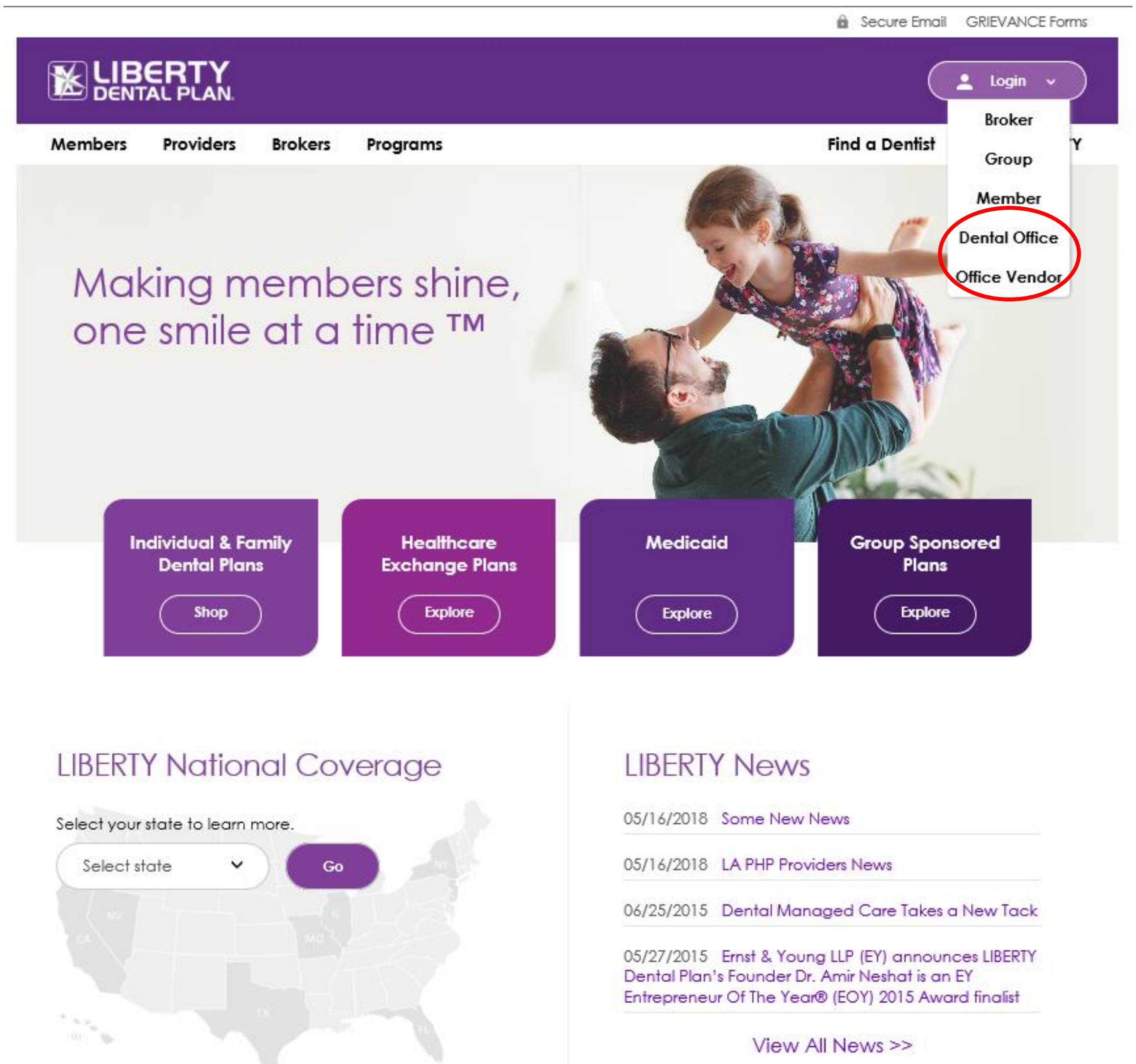
Note: Active Providers only identify a provider linked to your facility it does not verify the Line of Business (i.e., Medicaid, Commercial, etc.) the provider is linked to or the provider effective date. Please contact Professional Relations Department to verify the Line of Business and/or effective date for the individual Active provider prior to treating the member.

Accessing Your User Account

Login

Please visit www.libertydentalplan.com.

1. Click on **Login → Dental Office / Office Vendor**



Login *continued*

On the Office Portal Login screen:

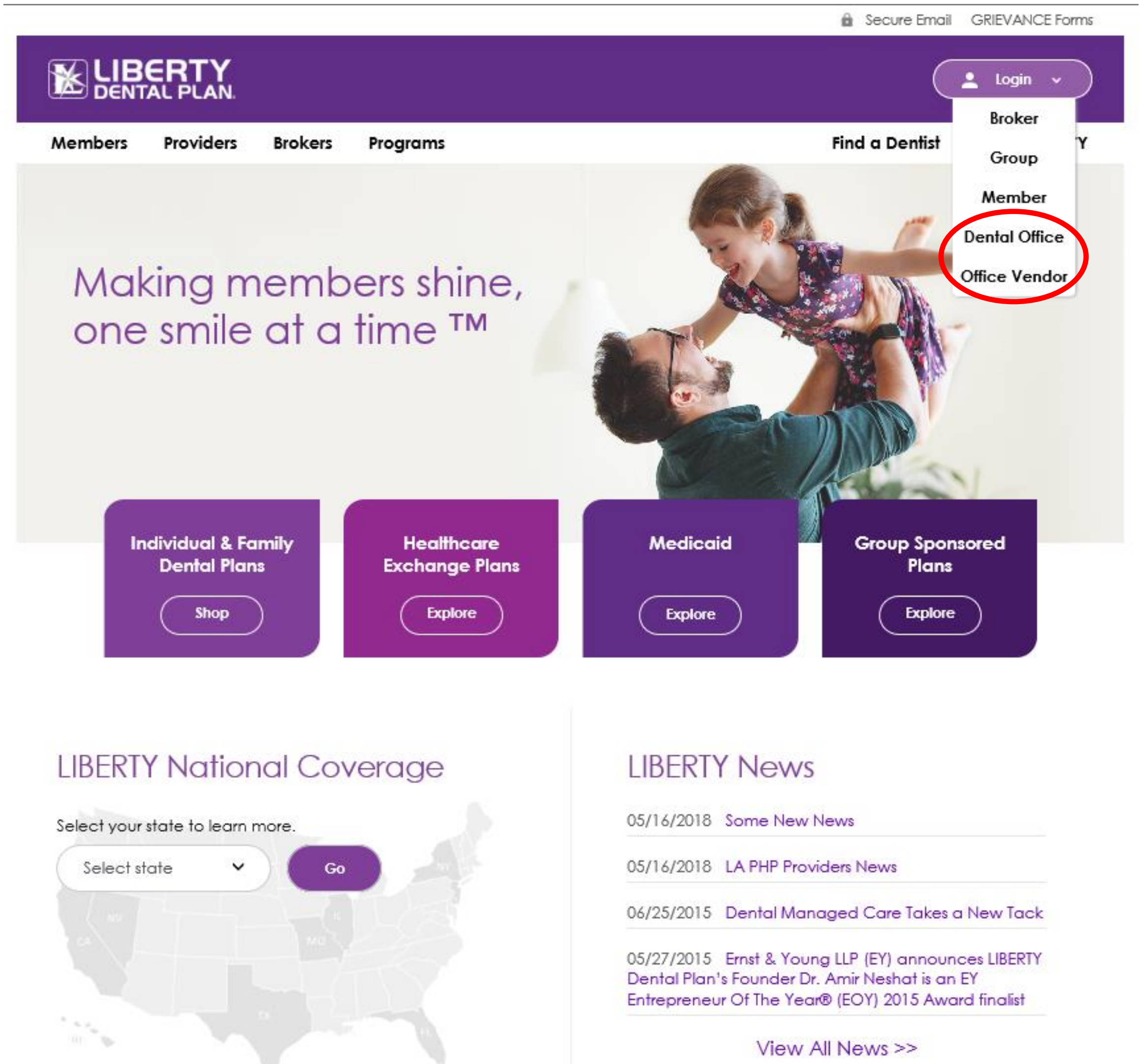
2. Type in **User Name** and **Password**
3. Check **I'm not a robot** box to open the reCAPTCHA window
4. Follow the instructions and select the appropriate images in the reCAPTCHA window
5. Click **Verify** in the reCAPTCHA window

6. Ensure you see a green check mark next to **I'm not a robot**
7. Click **Sign In**

Password Reset/Expired Password

Please visit www.libertydentalplan.com.

1. Click **Login → Dental Office / Office Vendor**

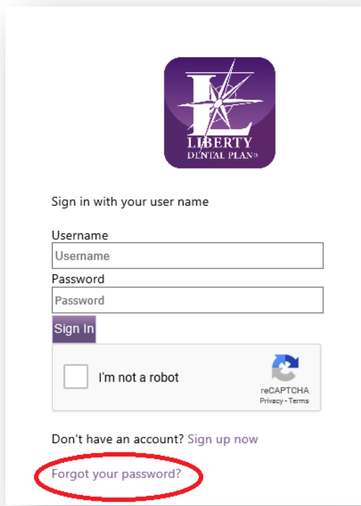


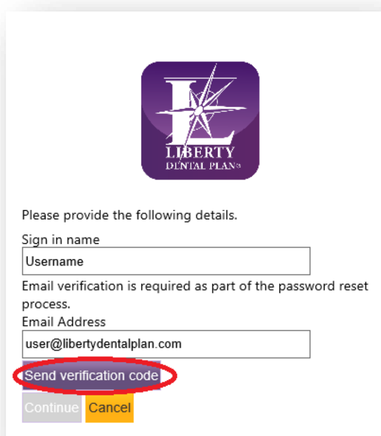
Password Reset/Expired Password *continued*

On the Office Portal Login screen:

2. Click **Forgot your password?**

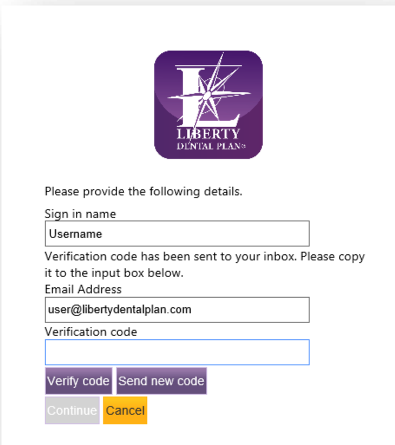
3. Type Username and Email Address associated to user account and click **Send verification code**

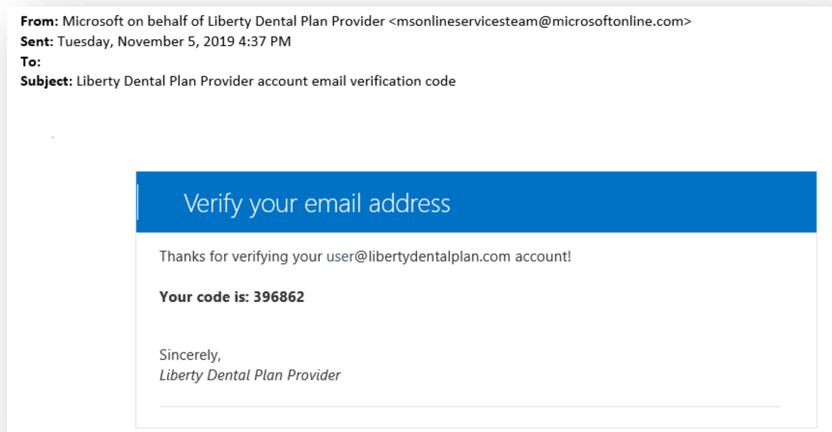




Password Reset/Expired Password *continued*

4. The following message will appear on your screen directing you to your email address to reset your account.

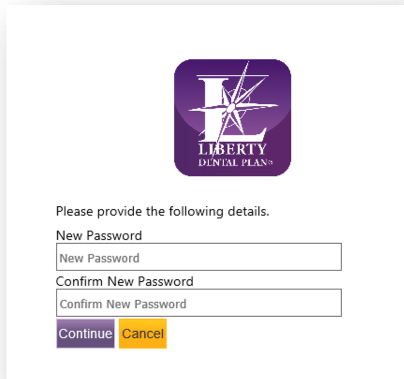




5. **Enter** the code from the email in the **Verification code**
6. **Click Verify Code** and then click **Continue**

Password Reset/Expired Password *continued*

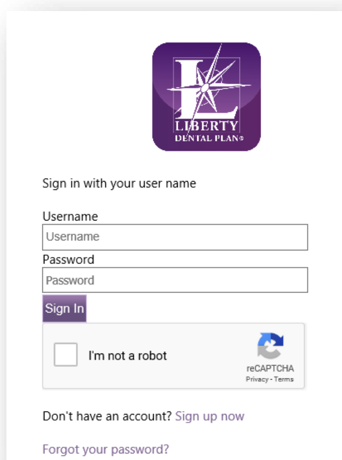
On the next screen:



7. Type in **New Password** and **Confirm New Password**

   Note: Passwords must be a minimum of 8 characters in length and contain at least 3 of the following: 1 uppercase letter, 1 lower case letter, 1 number and 1 special character. (!@#$%&*)

8. Click **Continue**



9. Type in **User Name** and **Password**
10. Check **I'm not a robot** box to open the reCAPTCHA window
11. Follow the instructions and select the appropriate images in the reCAPTCHA window
12. Click **Verify** in the reCAPTCHA window
13. Ensure you see a green check mark next to **I'm not a robot**
14. Click **Sign In**

Member Eligibility and Benefits

Check Member Eligibility

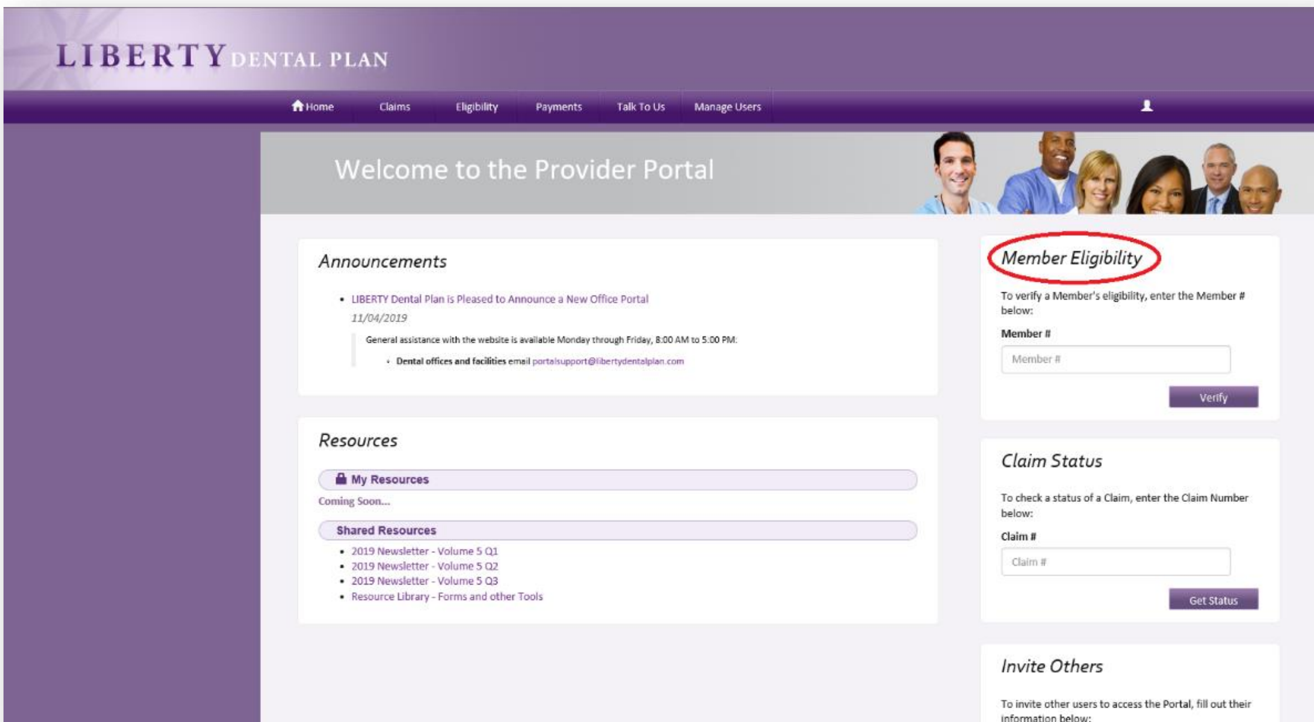
To check member eligibility:

You can access member eligibility in one of two ways:

a) Main Home screen **Member Eligibility** by entering the **Member #** with or without the suffix "-01, etc." or

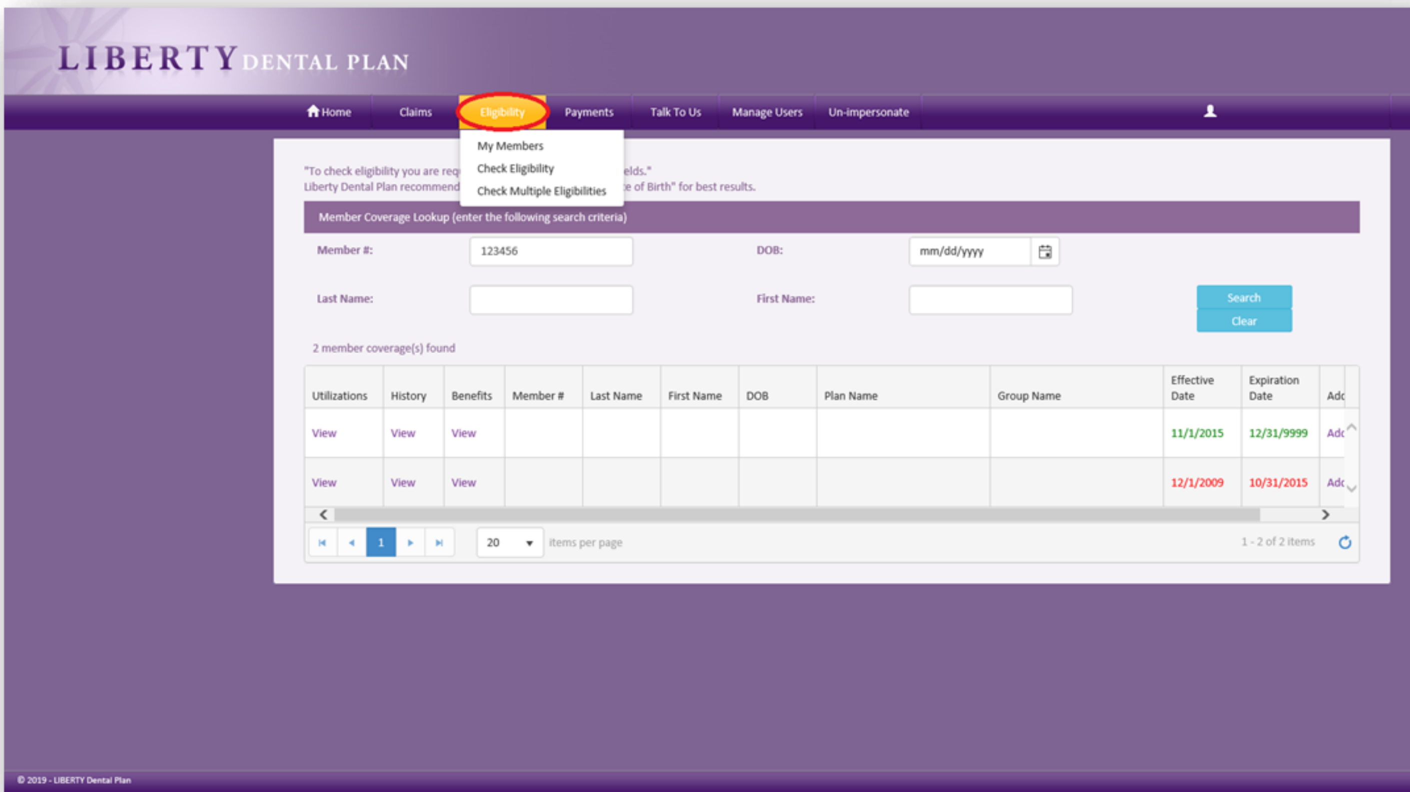
b) Drop-down menu **Eligibility** on the top of the screen

1. From the main Home screen enter **Member#** in the field on the right side of the screen Member Eligibility and click **Verify, or**



Check Member Eligibility *continued*

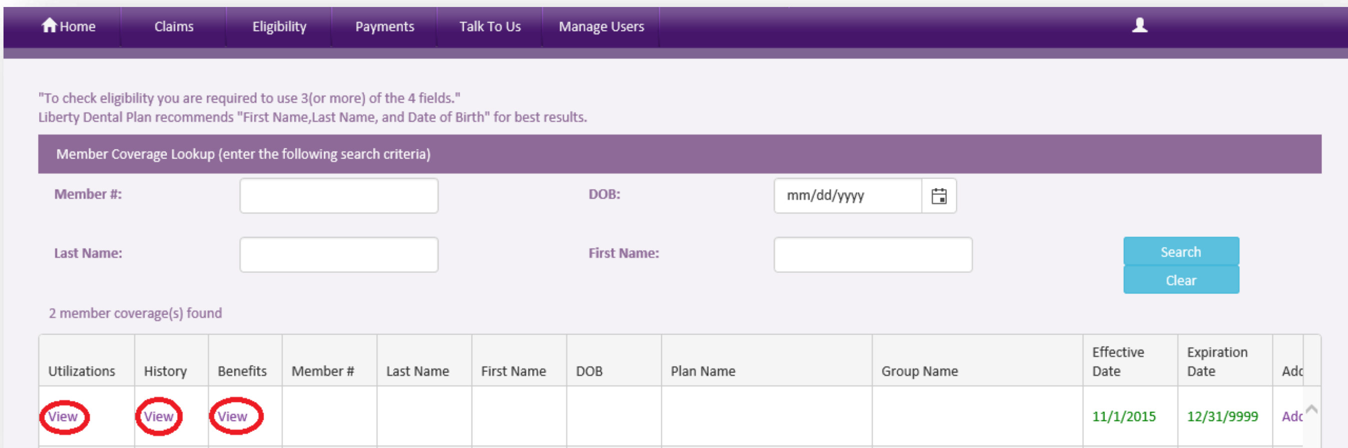
2. Click on **Eligibility** at the top of the screen
3. Users now have the ability to enter **Partial Last Name**, **Partial First Name** and **DOB** or **Member # (with or without the suffix, -01)**
   *(We recommend using **Last Name**, **First Name** and **DOB** for best results)*



4. Click **Search**

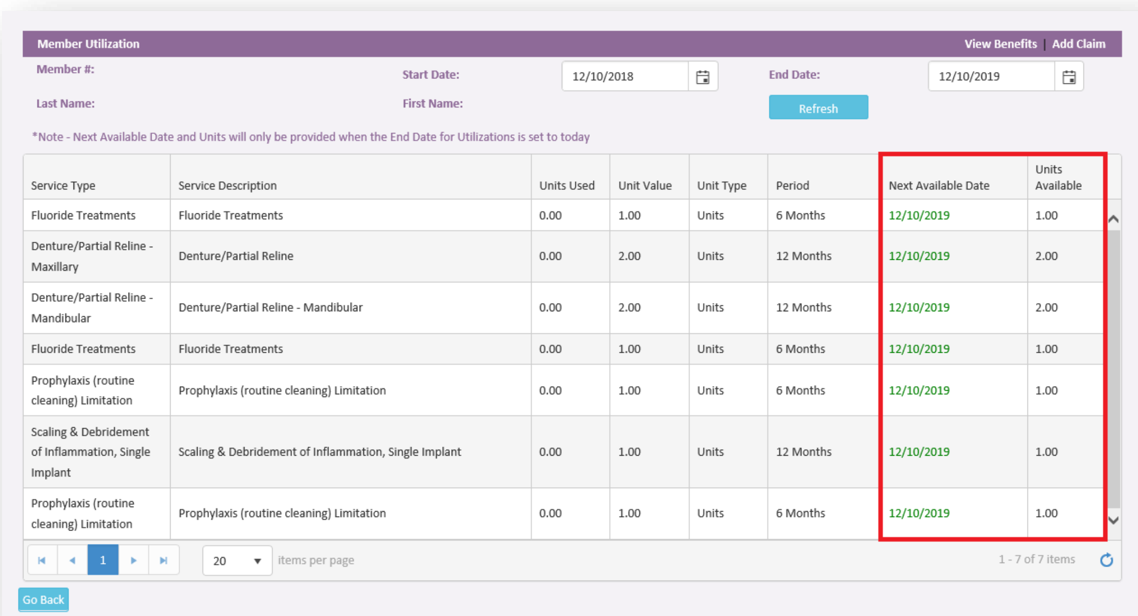
Check Member Eligibility *continued*

5. To view a member's benefit utilization, click on 'View' under **Utilizations**
6. To view a member's history, click on 'View' under **History**
   Note: The history page will display **all** history LIBERTY has on file for the selected member
7. To view a Summary of Benefits, click on 'View' under **Benefits**



Member Utilization Screen

LIBERTY recommends that the user refer to the **Next Available Date** and **Units Available** when determining member's utilizations.

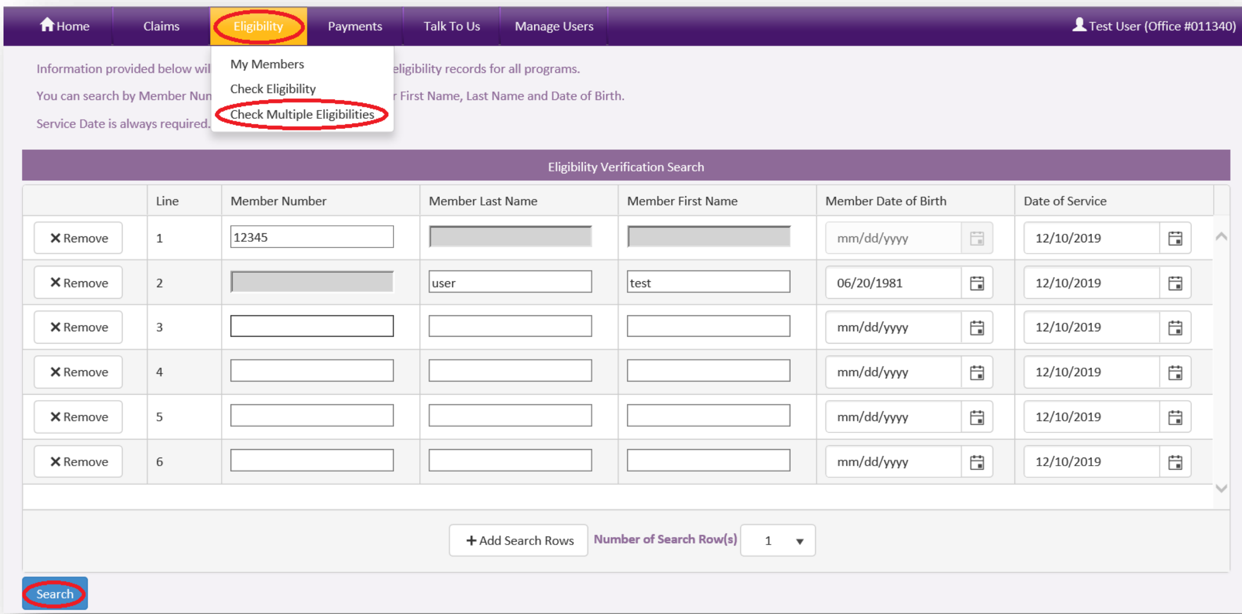


Service Type	Service Description	Units Used	Unit Value	Unit Type	Period	Next Available Date	Units Available
Fluoride Treatments	Fluoride Treatments	0.00	1.00	Units	6 Months	12/10/2019	1.00
Denture/Partial Reline - Maxillary	Denture/Partial Reline	0.00	2.00	Units	12 Months	12/10/2019	2.00
Denture/Partial Reline - Mandibular	Denture/Partial Reline - Mandibular	0.00	2.00	Units	12 Months	12/10/2019	2.00
Fluoride Treatments	Fluoride Treatments	0.00	1.00	Units	6 Months	12/10/2019	1.00
Prophylaxis (routine cleaning) Limitation	Prophylaxis (routine cleaning) Limitation	0.00	1.00	Units	6 Months	12/10/2019	1.00
Scaling & Debridement of Inflammation, Single Implant	Scaling & Debridement of Inflammation, Single Implant	0.00	1.00	Units	12 Months	12/10/2019	1.00
Prophylaxis (routine cleaning) Limitation	Prophylaxis (routine cleaning) Limitation	0.00	1.00	Units	6 Months	12/10/2019	1.00

Check Multiple Member Eligibilities *continued*

To check the eligibility of multiple members at one time:

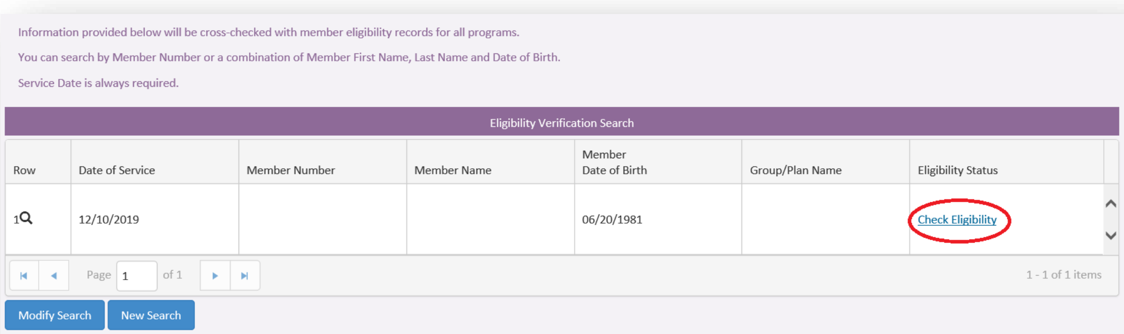
1. Click **Eligibility** on the top of the screen and click **Check Multiple Eligibilities**
2. Users now can enter **Partial Last Name**, **Partial First Name** and **DOB**, **Date of Service** or **Member Number (excluding the suffix)** and **Date of Service**
   *(We recommend using **Last Name**, **First Name**, **DOB** and **Date of Service** for best results)*



3. Click **Search**

Note: The maximum Number of Search Row(s) you can add per screen at a time is 10

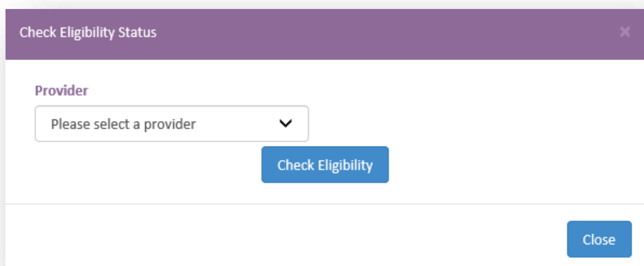
Example of Search Results:



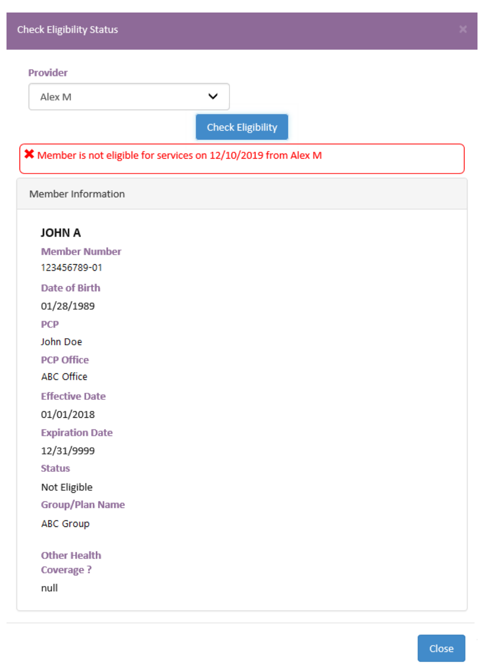
Check Multiple Member Eligibilities *continued*

4. Click **Check Eligibility Status** to validate if the member is eligible to be seen in your office

   New: Within **Check Eligibility**, LIBERTY has added a status feature. This enables your office to view any provider that is linked to your office contract and what plan the Member is linked to.
   Note: For plans requiring member assignments via a member roster, please refer to your member roster. Members not appearing on your roster should be referred to LIBERTY Dental Plan to be assigned to your office prior to services being rendered.
5. Click **Provider** from the drop-down menu then click **Check Eligibility**



Note: After clicking **Check Eligibility**, one of the following color-coded messages will be displayed:
Red: member is not eligible and/or not assigned to your office
Green: member is eligible and assigned to your office



6. Click **Close** to exit the **Check Eligibility Status**

Member Rosters

Capitation Plans/Dental Home Assignment

Offices that participate in a capitation program or with a program that requires Dental Home assignment may view their rosters by clicking on **Eligibility** located on top of the screen, then click **My Members**. The **My Members** screen allows the user to view all members assigned to the office.

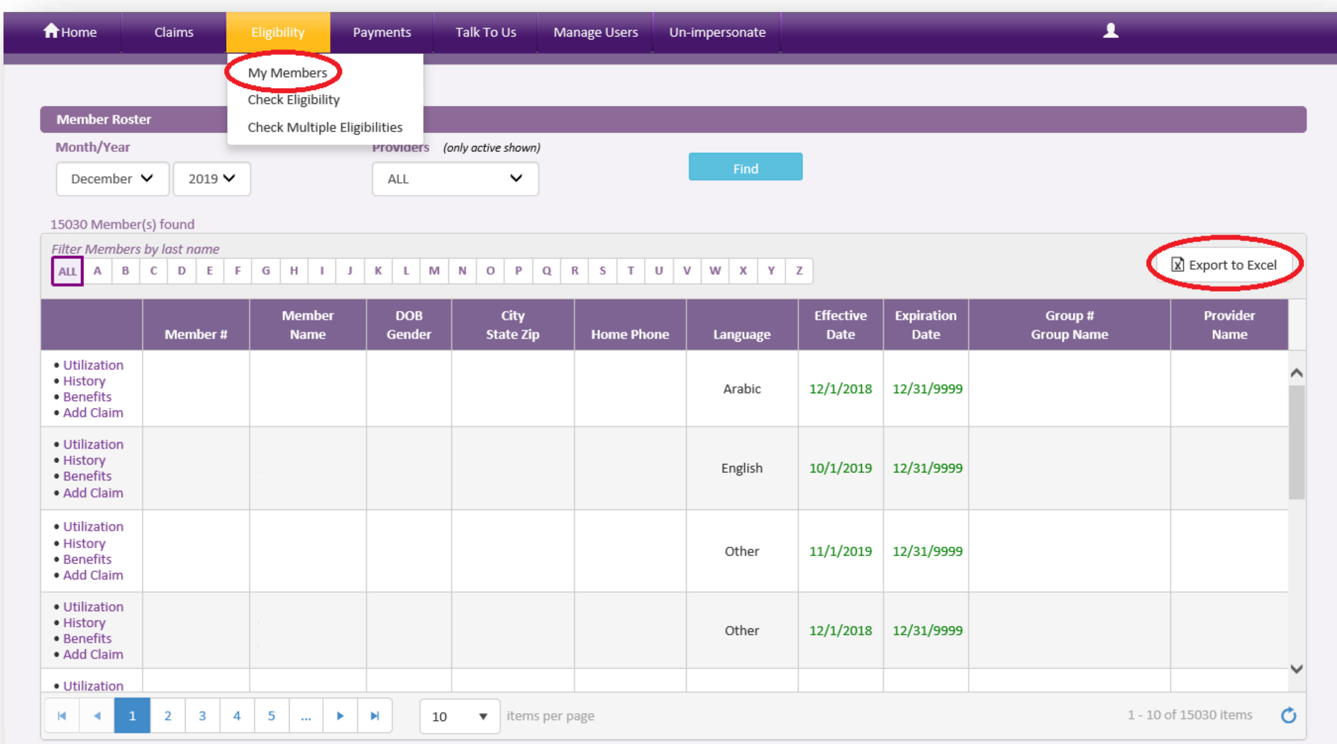
To sort membership assigned to an office by month, use the drop-down menus to select **Month/Year** and select **All**. Click **Find.**

To sort membership assigned to a specific provider, go to **Providers** and use the drop-down menu to select individual provider. Click **Find.**

New: Export to **Excel feature** is now available

New: Within the Member Roster, LIBERTY has added **Home Phone** and **Language**.

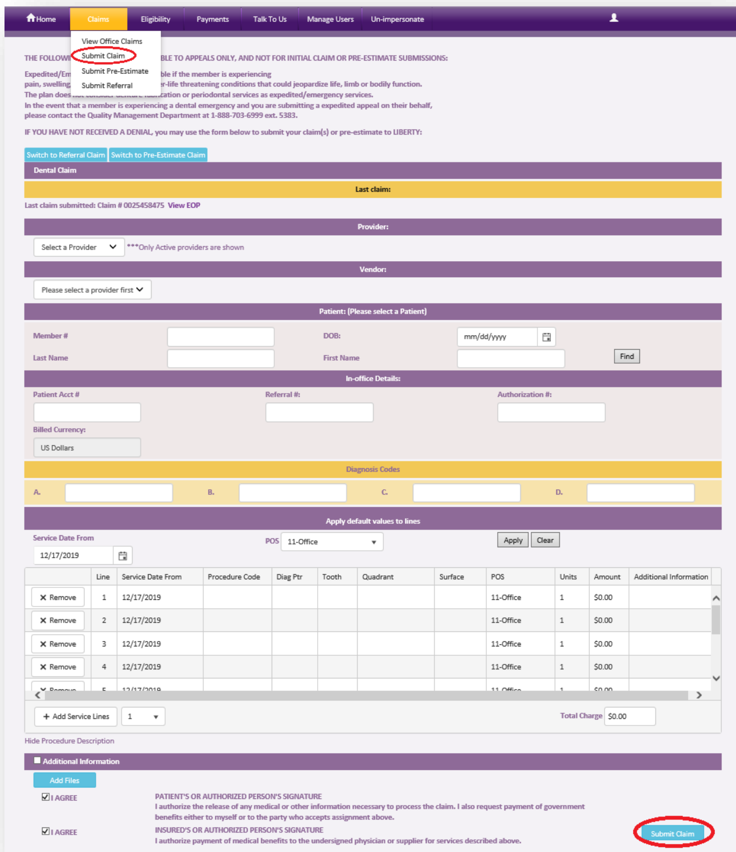
> **Note:** Home Phone will display for Medicaid plan members (if applicable) and/or if LIBERTY has a Home Phone on file for the Member.



Claims, Pre-Estimates and Referrals

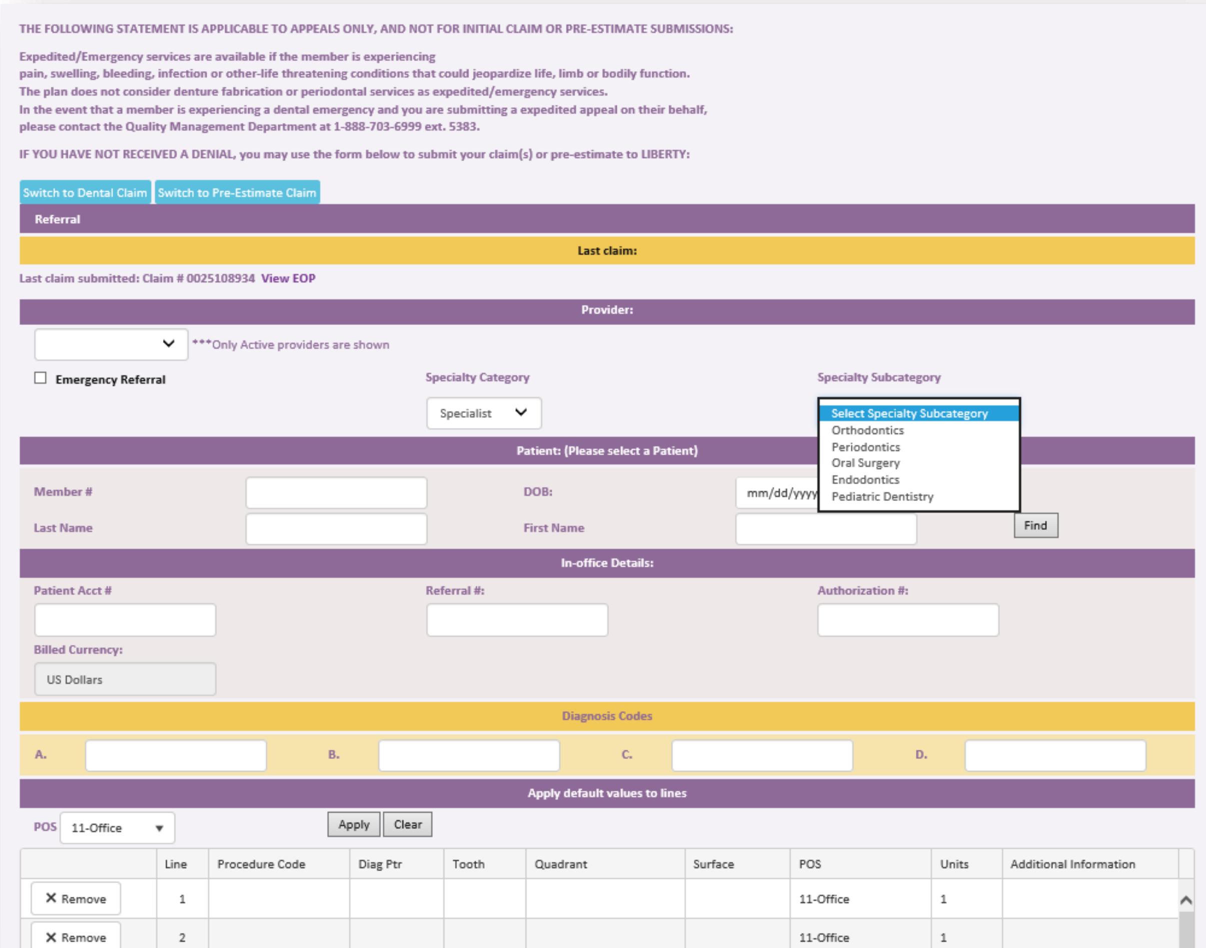
Submit a Claim, Pre-Estimate or Referral

1. Click **Claims** located on top of the screen, then click **Submit Claim**



a. You can view **Last Claim** for a treating provider
b. Choose treating provider from **Select a Provider** drop-down menu (only Active providers are shown)
c. Choose office/location from **Vendor** drop-down menu for **(Dental Claim)** or **(Pre-Estimate Claim)** submission (only Active vendors are shown)
d. Input patient information i.e. **Partial Last Name**, **Partial First Name** and **DOB** or **Member # (with or without the suffix, -01)** *(We recommend using **Last Name**, **First Name** and **DOB** for best results)*
e. Input **Diagnosis Codes** and **Diagnosis Pointers** (Diagnosis Pointers must be letters A-D)
f. Submit up to 30 service lines at a time by completing the fields in each row. To add additional lines, click **Add service line(s)**.

Submit a Claim, Pre-Estimate or Referral *continued*



THE FOLLOWING STATEMENT IS APPLICABLE TO APPEALS ONLY, AND NOT FOR INITIAL CLAIM OR PRE-ESTIMATE SUBMISSIONS:

Expedited/Emergency services are available if the member is experiencing
pain, swelling, bleeding, infection or other-life threatening conditions that could jeopardize life, limb or bodily function.
The plan does not consider denture fabrication or periodontal services as expedited/emergency services.
In the event that a member is experiencing a dental emergency and you are submitting a expedited appeal on their behalf,
please contact the Quality Management Department at 1-888-703-6999 ext. 5383.

IF YOU HAVE NOT RECEIVED A DENIAL, you may use the form below to submit your claim(s) or pre-estimate to LIBERTY:

Switch to Dental Claim | Switch to Pre-Estimate Claim

Referral

Last claim:

Last claim submitted: Claim # 0025108934 View EOP

Provider:

***Only Active providers are shown

Emergency Referral | Specialty Category: Specialist | Specialty Subcategory: Select Specialty Subcategory / Orthodontics / Periodontics / Oral Surgery / Endodontics / Pediatric Dentistry

Patient: (Please select a Patient)

Member # | DOB: mm/dd/yyyy
Last Name | First Name | Find

In-office Details:

Patient Acct # | Referral #: | Authorization #:

Billed Currency: US Dollars

Diagnosis Codes

A. | B. | C. | D.

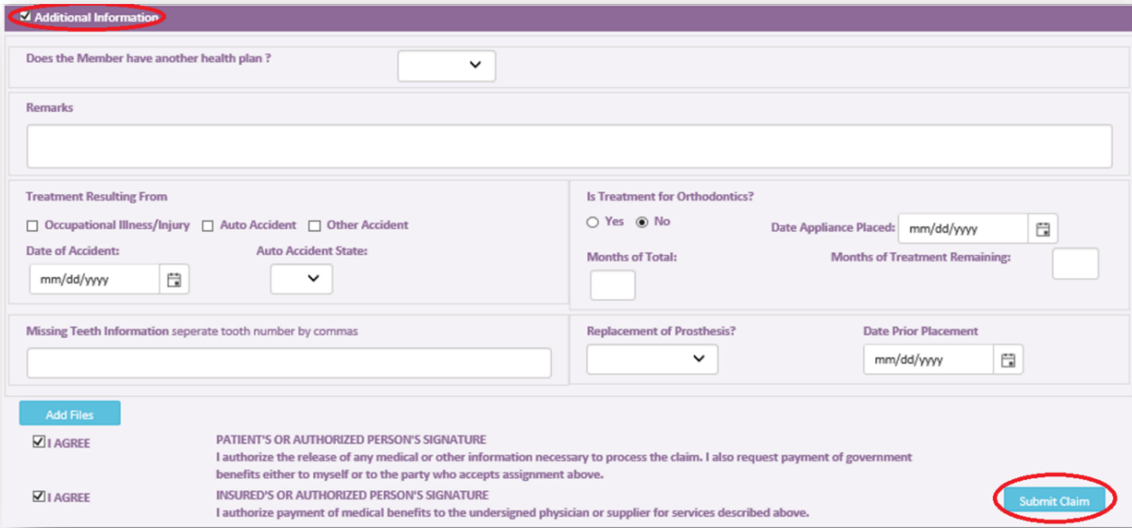
Apply default values to lines

POS 11-Office | Apply | Clear

	Line	Procedure Code	Diag Ptr	Tooth	Quadrant	Surface	POS	Units	Additional Information
✕ Remove	1						11-Office	1	
✕ Remove	2						11-Office	1	

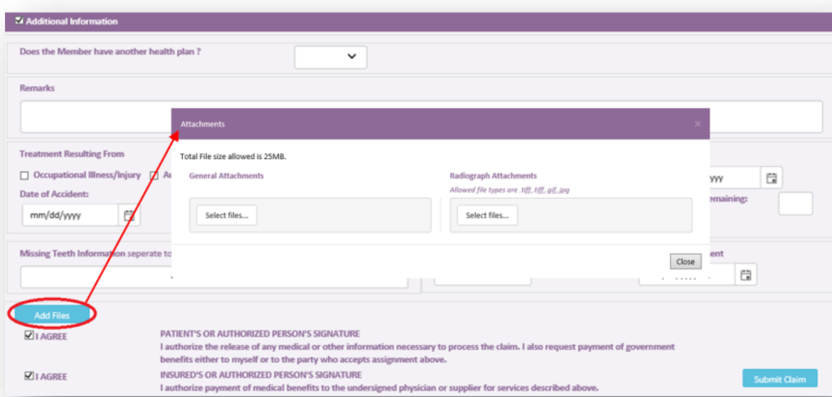
2. Click on the Claims menu, then click **Submit Referral** from the drop-down menu
   a. Select the **Provider** referring the patient from the drop-down menu
   b. For emergency referrals, check the **Emergency Referral** box
   c. Select the appropriate option from the **Specialty Category** drop-down menu (Defaulted to Specialist)
   d. Select the appropriate option from the **Specialty Subcategory** drop-down menu
   e. Input patient information i.e. **Partial Last Name**, **Partial First Name** and **DOB** or **Member # (with or without the suffix, -01)**
   *(We recommend using **Partial Last Name**, **Partial First Name** and **DOB** for best results)*
   f. Submit up to 30 service lines at a time by completing the fields in each row. To add additional lines, click **Add service line(s)**.

Submission with Additional Information



1. Check the **Additional Information** box towards the bottom of the Submit a Claim screen
   a. Enter any comments in the Remarks box
   b. **Add File** – this feature can be used to attach digital x-rays or other information pertaining to the claim.

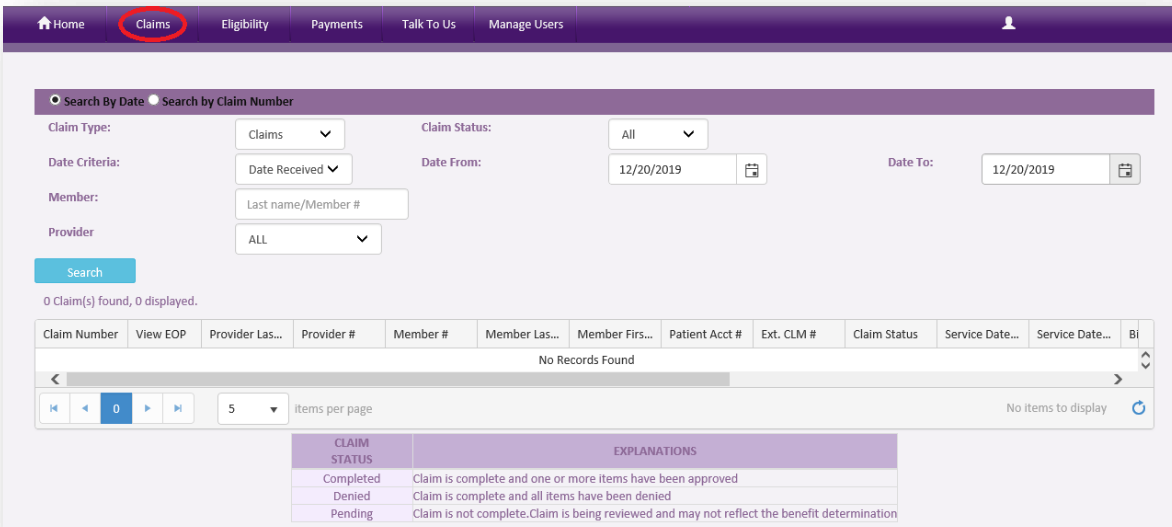
      Note: There is an 8MB limit per attachment and up to 25MB in total. Multiple Attachments can be uploaded at once.



2. Check both **I Agree** boxes
3. Click **Submit Claim**

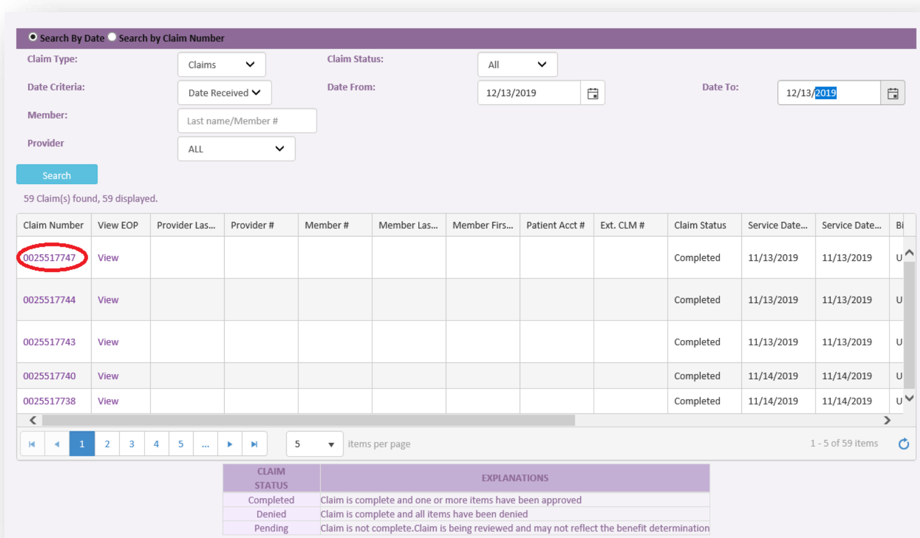
Resubmit/Correct a Claim, Pre-Estimate or Referral

1. To resubmit/correct a claim, pre-estimate or referral, click on the **Claims** menu, then click **View Office Claims** from the drop-down menu



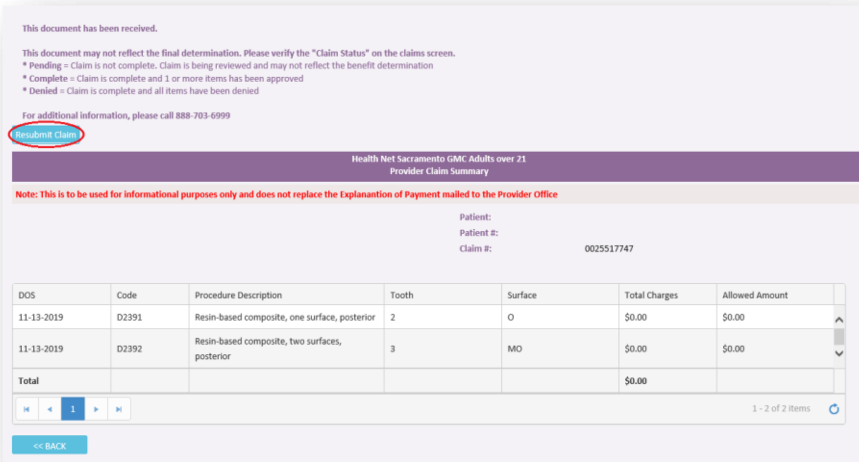
2. Click on **Search by Date** or **Search by Claim Number** radio buttons to find the claim, pre-estimate or referral that needs to be resubmitted/corrected

3. Once the claim is found, click on the **number** under the Claim Number column of the claim that needs to be resubmitted/corrected



Resubmit/Correct a Claim, Pre-Estimate or Referral *continued*

4. After the Explanation of Payment is displayed, click on **Resubmit Claim**

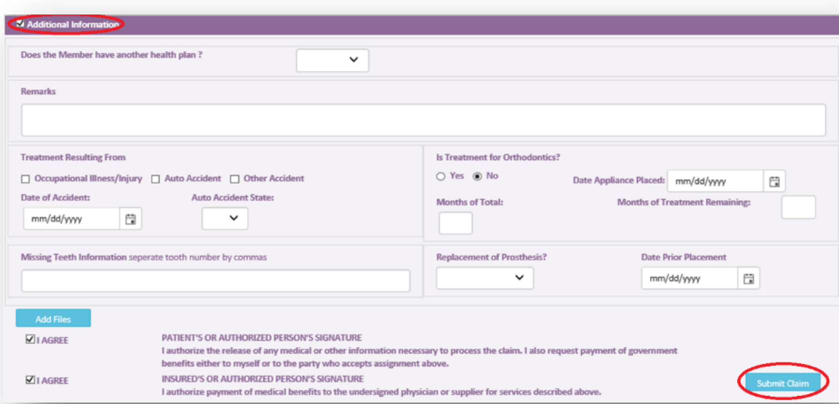


5. When **Resubmit Claim** is selected, the information from the claim, pre-estimate or referral will populate on the **Submit Claim** screen

   Note: You can correct any missing teeth#, surfaces, quadrant, etc. that require correction

6. Check the **Additional Information** box towards the bottom of the **Submit Claim** screen
   a. Enter any comments in the Remarks box
   b. **Add File** – this feature can be used to attach digital x-rays or other information pertaining to the claim.

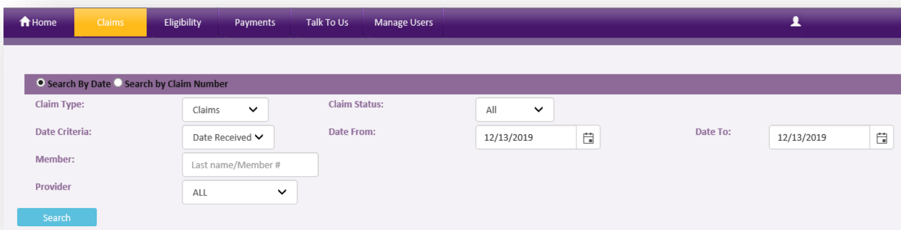
   Note: There is an 8MB limit per attachment and up to 25MB in total. Multiple Attachments can be uploaded at once.



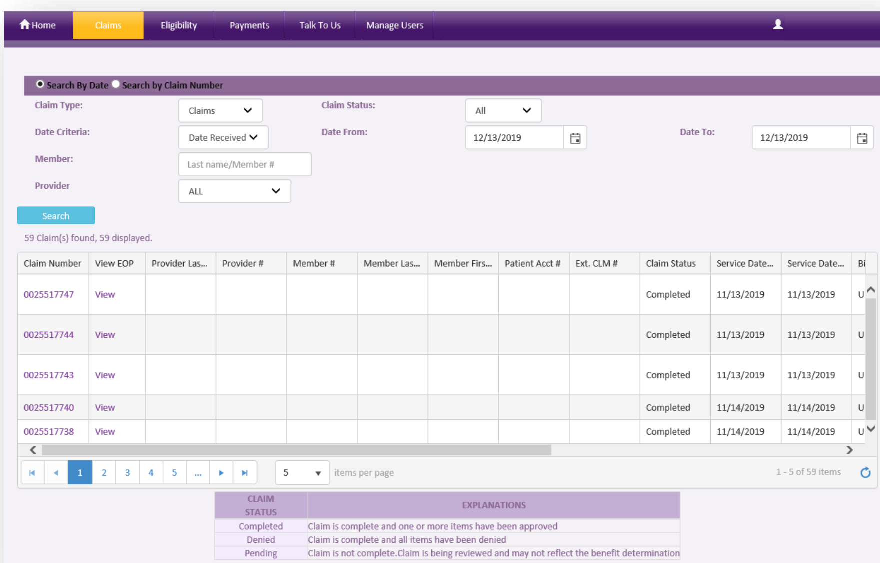
7. Check both **I Agree** boxes
8. Click **Submit Claim**

Check the Status of a Claim, Pre-Estimate or Referral *continued*

1. To view a Claim, Pre-Estimate or Referral associated with your office, click on the **Claims** menu, then click **View Office Claims** from the top of the screen
2. Click on **Search by Date** or **Search by Claim Number** radio buttons
3. When searching by date, use the **Claim Type** drop-down menu to select **Claims**, **Pre-Estimate** or **Referral**
4. You can narrow your search results using the **Claim Status** drop-down menu or **Member Last Name** box
5. Click **Search**



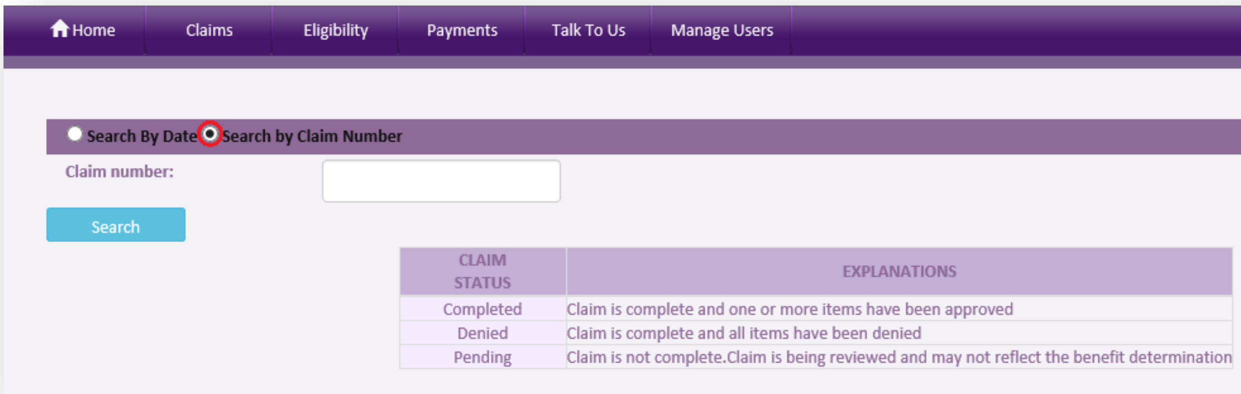
Example of Search Results:



All data fields will remain the same, except when searching for a Referral. The **Referring Entity** column will display a 'Y' instead of 'N'

Search a Claim by Claim Number

1. Click on the **Search by Claim Number** radio button

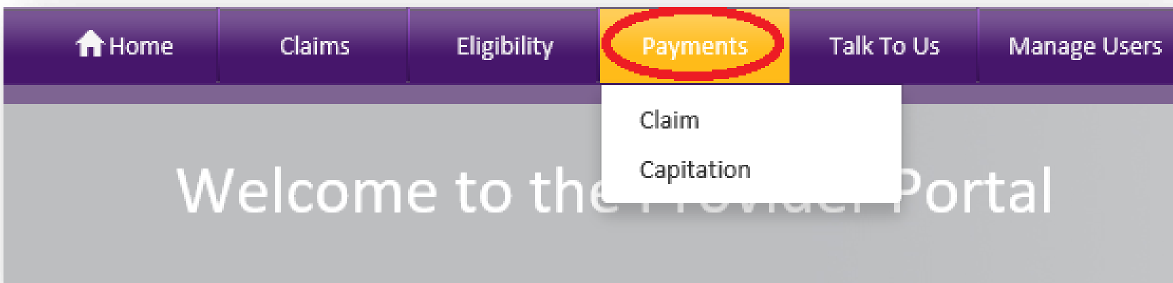


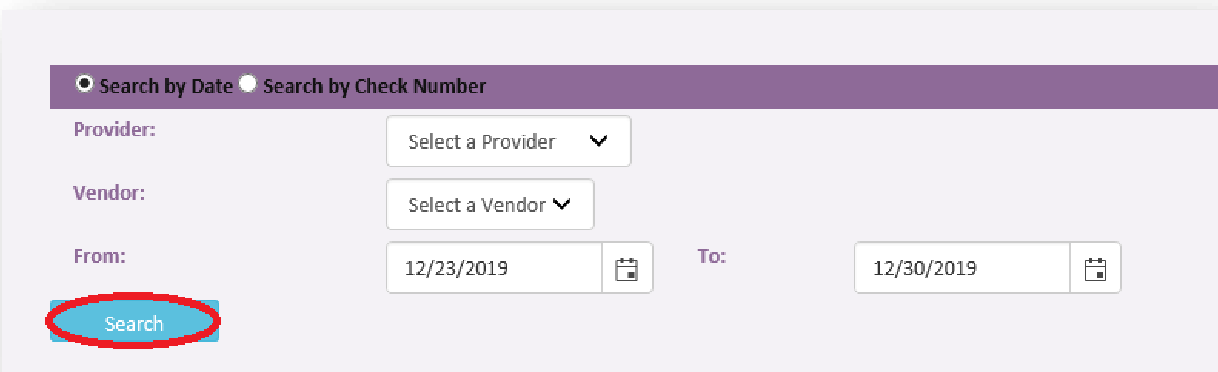
2. Enter the **Claim Number** in the search field
3. Click **Search**

Payments

View checks paid to the vendor, along with the details of the payment

1. Click **Payments** on the top of the screen to view available claim payments (Payments is formerly "My Checks")





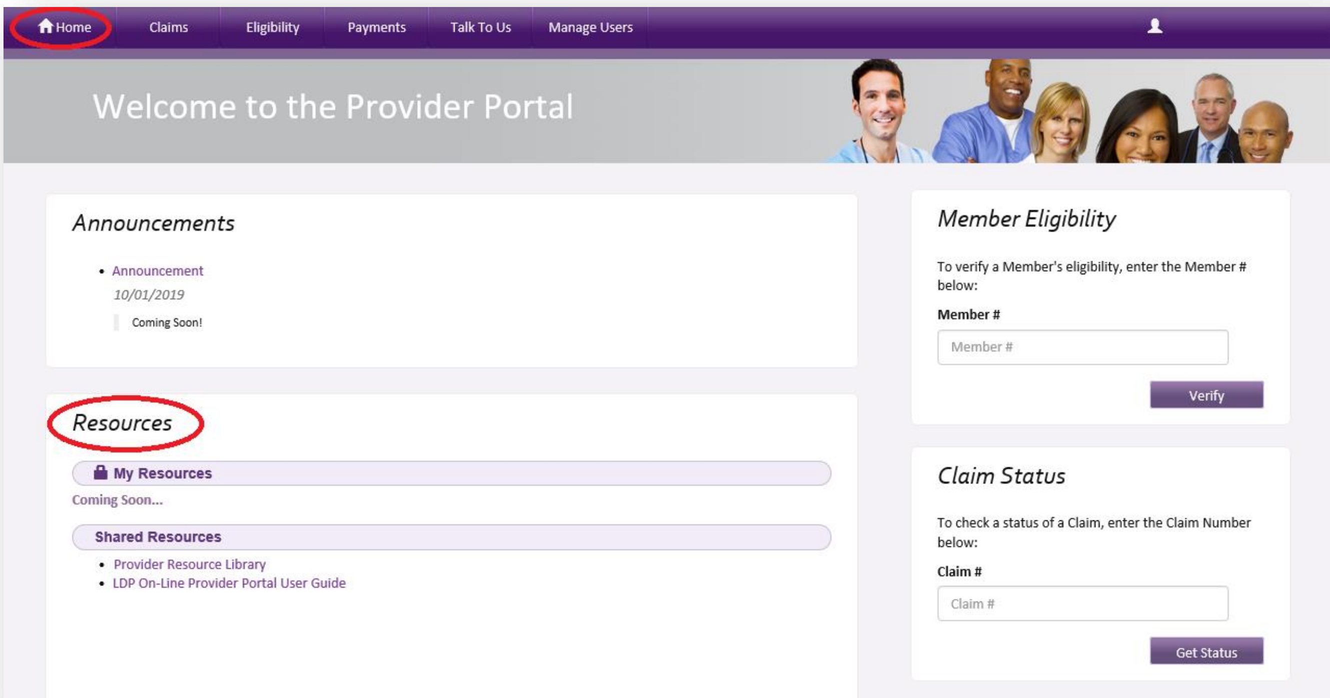
2. Click which **Payment Type** to review the details of the payment
3. Click on **Search by Date**, **or Search by Check Number** radio buttons
4. Click **Provider** and **Vendor**
5. Input Date range
6. Click **Search**

Resources

My Resources

Here you will find unique documents specific to your office.

1. Click **Home** on the top of the screen to view available documents (My Resources is formerly “Attachments”)

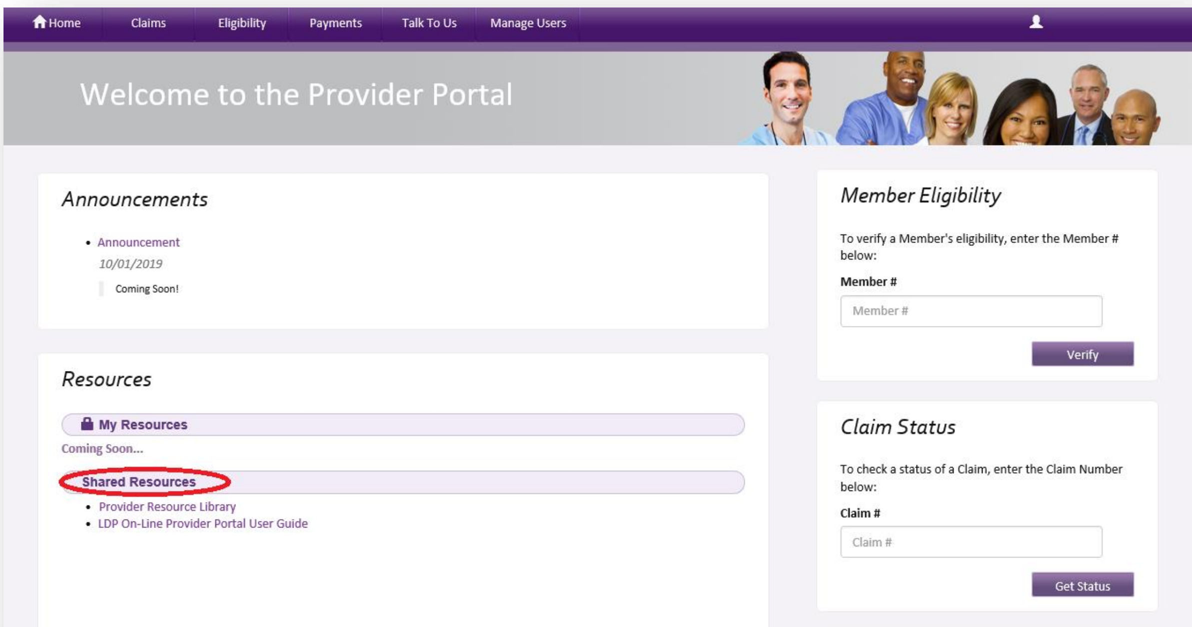


Resources

Shared Resources - Forms and Provider Reference Guides

Forms and Provider Reference Guides can be downloaded from the Office Portal/LIBERTY website.

1. Click on **Home** on top of the screen then refer to the **Shared Resources** section of the screen to view and download the following:
   a. Provider Reference Guides specific to your state
   b. Provider Newsletters
   c. Office Portal User Guide

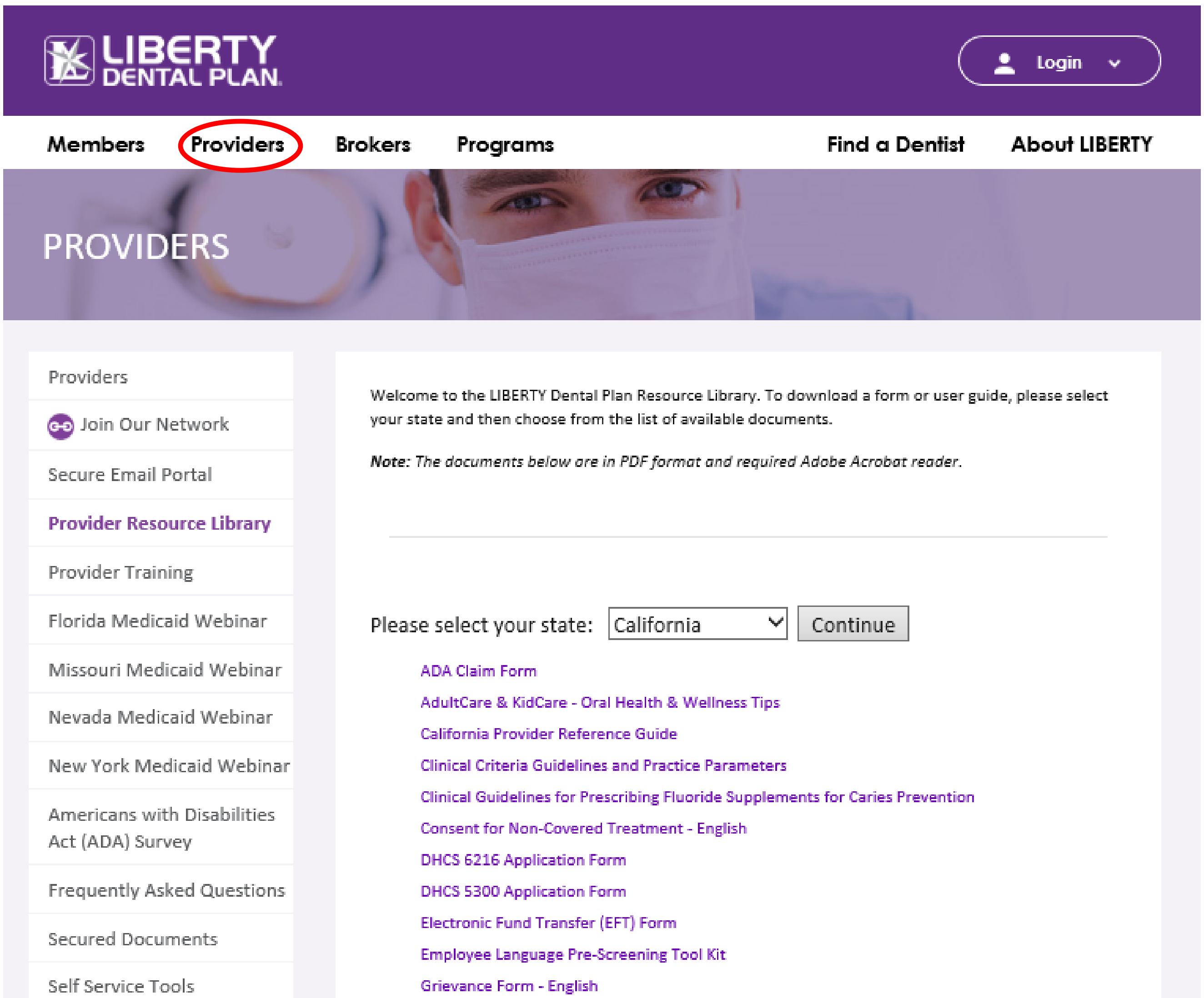


2. Click on **Provider Resource Library** which will launch a new web browser
   Click on the link provided at the bottom of the web page to launch the **Provider Resource Library**

   https://www.libertydentalplan.com/Providers/Provider-Resource-Library.aspx

Provider Resource Library

1. Select the state from the **Please select your state** drop-down menu
2. Click **Continue**

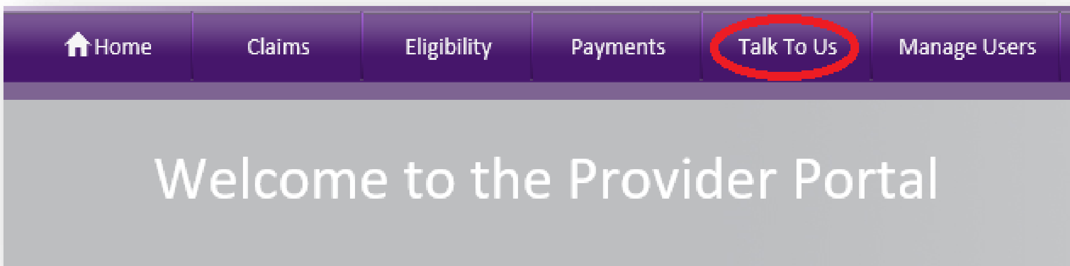


3. Click on the form(s) needed to view and/or print

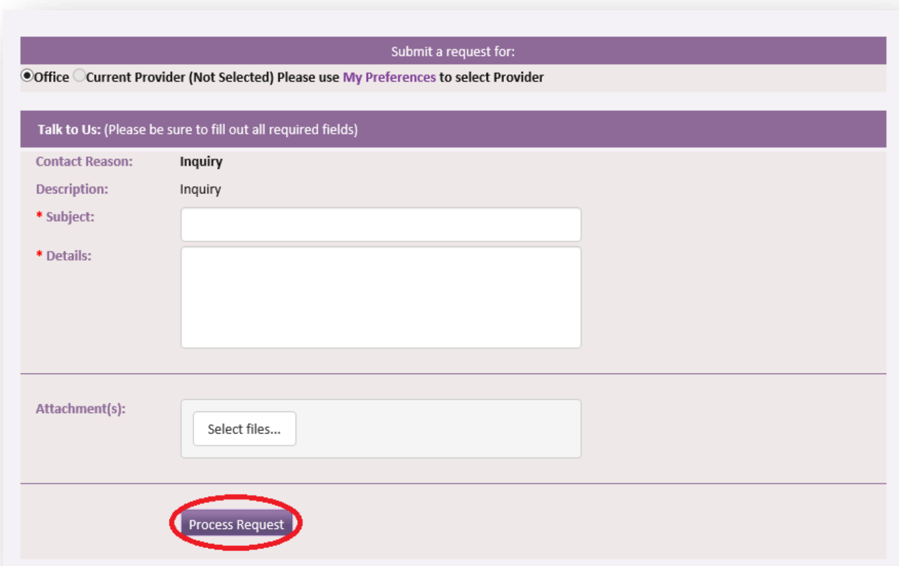
Talk To Us

Submitting a Written Inquiry

A LIBERTY Representative can be contacted through the Office Portal by clicking the **Talk To Us** on the top of the screen.



1. Enter the **Subject**
2. Enter the **Details**
3. Attach any pertinent files by clicking on **Select File(s)…**

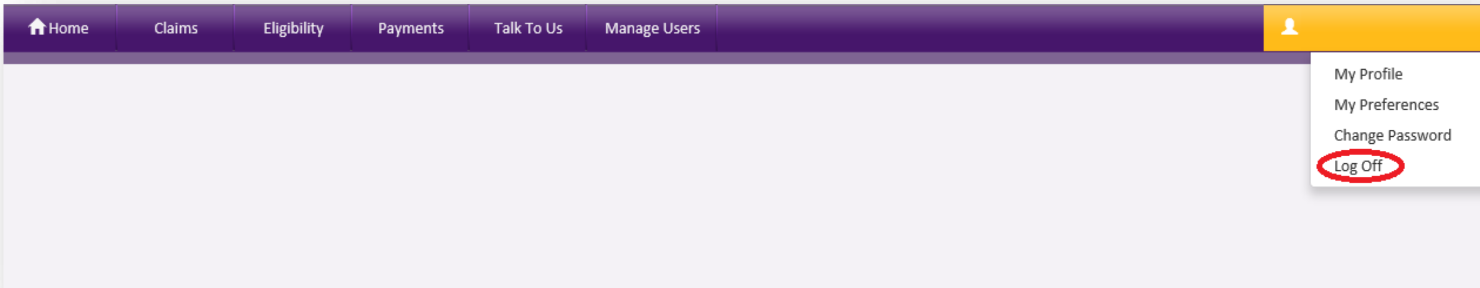


4. Click **Process Request**

Log Off

To Log Off of the Office Portal

1. Click the **Log Off** on the right side of the screen
   Note: You will be automatically logged off within 5 minutes of inactivity



LIBERTY DENTAL PLAN

Office Portal User Guide

Making members shine, one smile at a time™

Rev. 2020.07