

# Colorado Medical Assistance Program Web Portal

## Data Maintenance User Guide

Sometimes you will need to change (update, add, or delete) the client and provider information or find a provider. These functions are available from the Main Menu of the Portal, on the left side of the screen, under Data Maintenance and Medicaid Provider Lookup.

- [Client Maintenance](#)
- [Provider Maintenance](#)
- [Medicaid Provider Lookup](#)

### Client Maintenance

The Client Lookup screen (Figure 1) allows you to:

- Search for a client to either update or delete the client information, or, to see if a client exists in the database before attempting to add it.
- Add a new client.

State ID	Last Name	First Name	SSN	Date of Birth
Z 4		THELMA		11/11/
Z 5		MONROE	123-45-6789	11/11/
Z 6		WILMA		12/14/
Z 9		CHLOE		12/31/

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Search Criteria:  
\* State ID    \* Begins With    \* Z    Search    Reset

Add New Client  
State ID:    Add

Figure 1 – Client Lookup screen

## Using the Display Grid

The display grid in the middle of the screen contains columns of information that can be:

- Sorted – Click on any of the column titles to sort the display grid by that column and click it again to sort it back.
- Scrolled – Click on the [\[Previous Page\]](#) or [\[Next Page\]](#) links below the grid.
- Skipped – Type the screen number in the box below the grid and click **Go** to jump to the screen number specified.

## Search for a Client

- Select a column (**State ID, Last Name, First Name, SSN**) in the first search box by using the drop-down button.
- Select a search method (**Exact Match, Begins With, Contains**) in the second box.
- Type in the characters to search by in the last box (Figure 2).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

### Client Lookup

State ID	Last Name	First Name	SSN	Date of Birth
☺	HARRISON			12/14/.....

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**Search Criteria:**

\*  \*  \*

**Add New Client**

State ID:

**Figure 2** – Search example by Last Name beginning with the letter H

- Click on the **Search** button to process your request – the results will appear in the display grid (Figure 3).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Client Lookup**

State ID	Last Name	First Name	SSN	Date of Birth
Z .6	HARRISON			12/14/
Z .5	HARRISON		123-45-6789	11/11/
Z .4	HARRISON			11/11/

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**Search Criteria:**

\*   \*   \*

**Add New Client**

State ID:

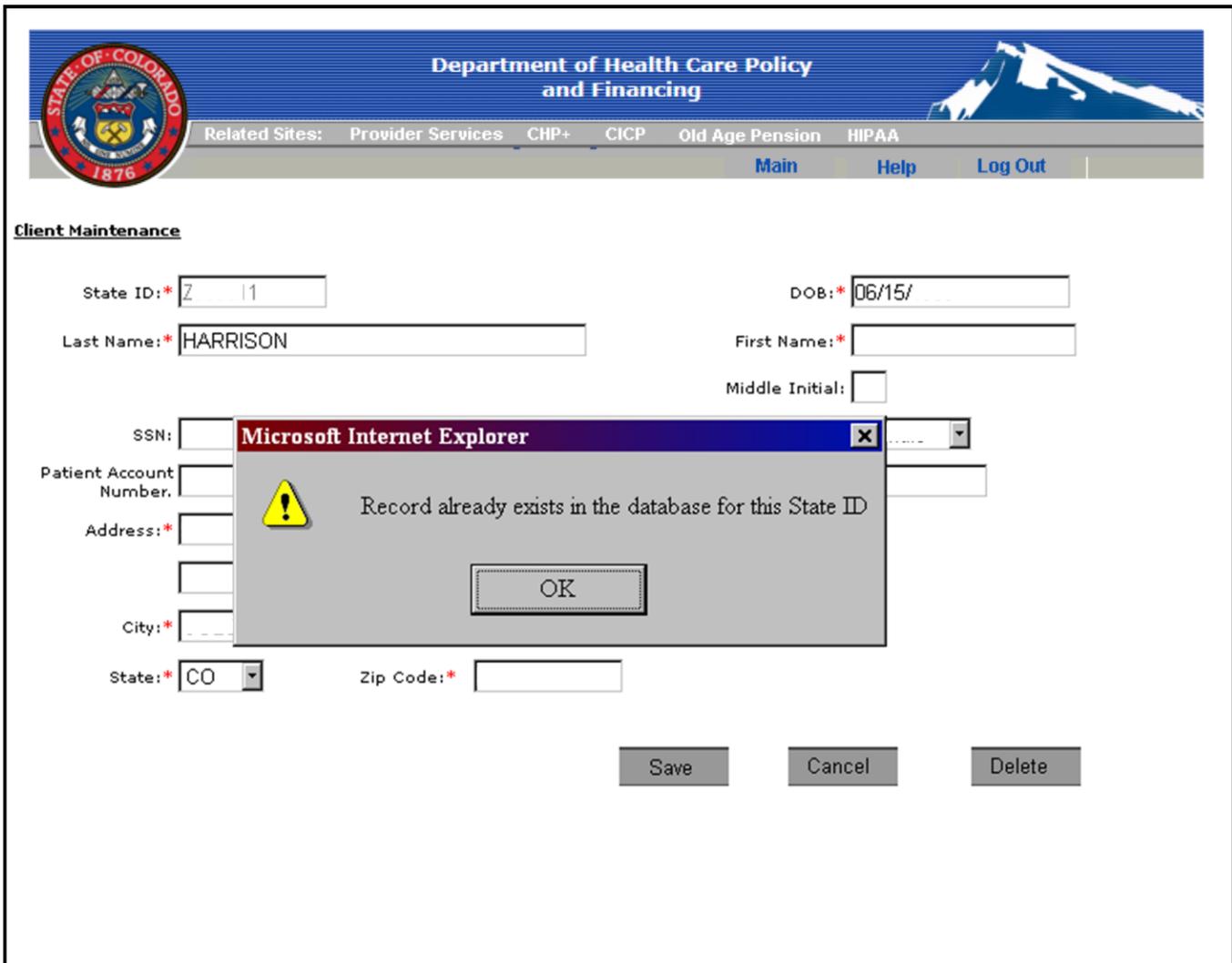
**Figure 3 – Search results**

- Click on the **Reset** button to clear the search results and return to the default view of the display grid.

## Using the Client Maintenance Screen

There are two ways to open the Client Maintenance screen:

- Perform a search to display the client in the grid and click on the **State ID** link.
- Enter a new **State ID** in the **State ID** entry box at the bottom of the screen and click on the **Add** button.  
If the client number already exists, an error will display (Figure 4).



The screenshot displays the 'Client Maintenance' interface for the Department of Health Care Policy and Financing. The header includes the state seal and navigation links like 'Main', 'Help', and 'Log Out'. The form fields are partially filled: State ID is 'Z 11', Last Name is 'HARRISON', and DOB is '06/15/'. A modal error dialog box is overlaid on the form, titled 'Microsoft Internet Explorer', with a yellow warning icon and the message 'Record already exists in the database for this State ID'. The dialog has an 'OK' button. Below the form are 'Save', 'Cancel', and 'Delete' buttons.

**Figure 4** – Error message when adding a new client when the client number already exists

- Click on the **OK** button.
- Click on the **Cancel** button to return to the Client Lookup screen. The information for the existing client will not be changed.

The Client Maintenance screen allows you to update or delete client information or add the required information for a new client in the database.

- If updating the client information, make the necessary changes in the entry boxes and click on the **Save** button (Figure 5).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Client Maintenance**

State ID: \*

Last Name: \*

SSN:

Patient Account Number:

Address: \*

City: \*

State: \*

DOB: \*

First Name: \*

Middle Initial:

Gender:

Medicare Number:

Zip Code: \*

**Figure 5 – Client Maintenance screen open for editing**

- If deleting the client, click the **Delete** button. A delete confirmation box will appear (Figure 6). Click on **Ok** to process the request.

STATE OF COLORADO  
1876

Department of Health Care Policy and Financing

Related Sites: Provider Services CHP+ CICP Old Age Pension HIPAA

Main Help Log Out

**Client Maintenance**

State ID:\* Z 5 DOB:\* 11/11/1950

Last Name:\* HARRISON First Name:\*

Middle Initial:

SSN: Patient Account Number:

Address:\*

City:\*

State:\* CO Zip Code:\*

Save Cancel Delete

Microsoft Internet Explorer

Are you sure you want to delete the record?

OK Cancel

Figure 6 – Delete confirmation box

- A previously deleted client may be restored to the database. To restore a deleted client, enter the **State ID** in the **State ID** entry field on the Client Lookup screen and click the **Add** button. The system will respond by displaying the deleted client information with a dialog box confirming the restoration of the record (Figure 7). To restore the client, click on the **OK** button. Click on **Cancel** to keep the client deleted.

The screenshot shows the 'Client Maintenance' interface. At the top is the header for the 'Department of Health Care Policy and Financing' with the State of Colorado logo and navigation links for 'Main', 'Help', and 'Log Out'. Below the header are links for 'Related Sites: Provider Services, CHP+, CIP, Old Age Pension, HIPAA'. The main form area contains fields for 'State ID:\*' (with 'Z 6' entered), 'DOB:\*' (with '01/01/' entered), 'Last Name:\*' (with 'HARRISON' entered), 'First Name:\*', 'Middle Initial:', 'SSN:', 'Patient Account Number.', 'Address:\*', 'City:\*', 'State:\*' (with 'CO' selected in a dropdown), and 'Zip Code:\*'. A modal dialog box titled 'Microsoft Internet Explorer' is overlaid on the form, containing a question mark icon and the text 'This record has been deleted. Do you want to restore the record?'. The dialog has 'OK' and 'Cancel' buttons. At the bottom of the form are 'Save', 'Cancel', and 'Delete' buttons.

Figure 7 – Restoring a deleted client

- If adding a new client, enter the **State ID** in the **State ID** field on the Client Lookup screen and click on the **Add** button. Enter the required information on the Client Maintenance screen and click on the **Save** button. Although not required in the Client Maintenance screen, assign a **Patient Account Number** due to it being required when submitting claims. If errors are encountered when the **Save** button is clicked, the errors will display in red at the top of the screen (Figure 8). Correct the errors and click on the **Save** button.

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Client Maintenance**

- Last name must be entered
- Address Line 1 must be entered
- First name must be entered
- City must be entered
- Zip Code must be entered
- Date of Birth (MM/DD/YYYY) must be entered

State ID:\*  DOB:\*

Last Name:\*  First Name:\*

Middle Initial:

SSN:  Gender:

Patient Account Number:  Medicare Number:

Address:\*

City:\*

State:\*  Zip Code:\*

**Figure 8 – Possible errors when saving a new client**

- Click on the **Cancel** button if you want to return to the Client Lookup screen and not change or save the client information.

## Provider Maintenance

The Provider Lookup screen (Figure 9) allows you to:

- Search for a provider to either update or delete the provider information or to see if a provider exists in the database before attempting to add it
- Add a new provider

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

### Provider Lookup

Provider ID	Type	Name
0 [redacted] 5	Individual	K [redacted] MD, S [redacted]
0 [redacted] 4	Individual	S [redacted], D [redacted]
0 [redacted] 0	Individual	A [redacted], D [redacted]
0 [redacted] 3	Individual	H [redacted], S [redacted]
0 [redacted] 0	Organization	[redacted] CLINIC
0 [redacted] 7	Organization	[redacted] REGIONAL CENTER
0 [redacted] 9	Individual	J [redacted], M [redacted]
0 [redacted] 1	Individual	C [redacted], C [redacted]
0 [redacted] 7	Organization	[redacted] HOSPITAL
0 [redacted] 6	Individual	C [redacted], B [redacted]

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**Search Criteria:**

\*   \*   \*

**Add New Provider**

Provider ID:

Figure 9 – Provider Lookup screen

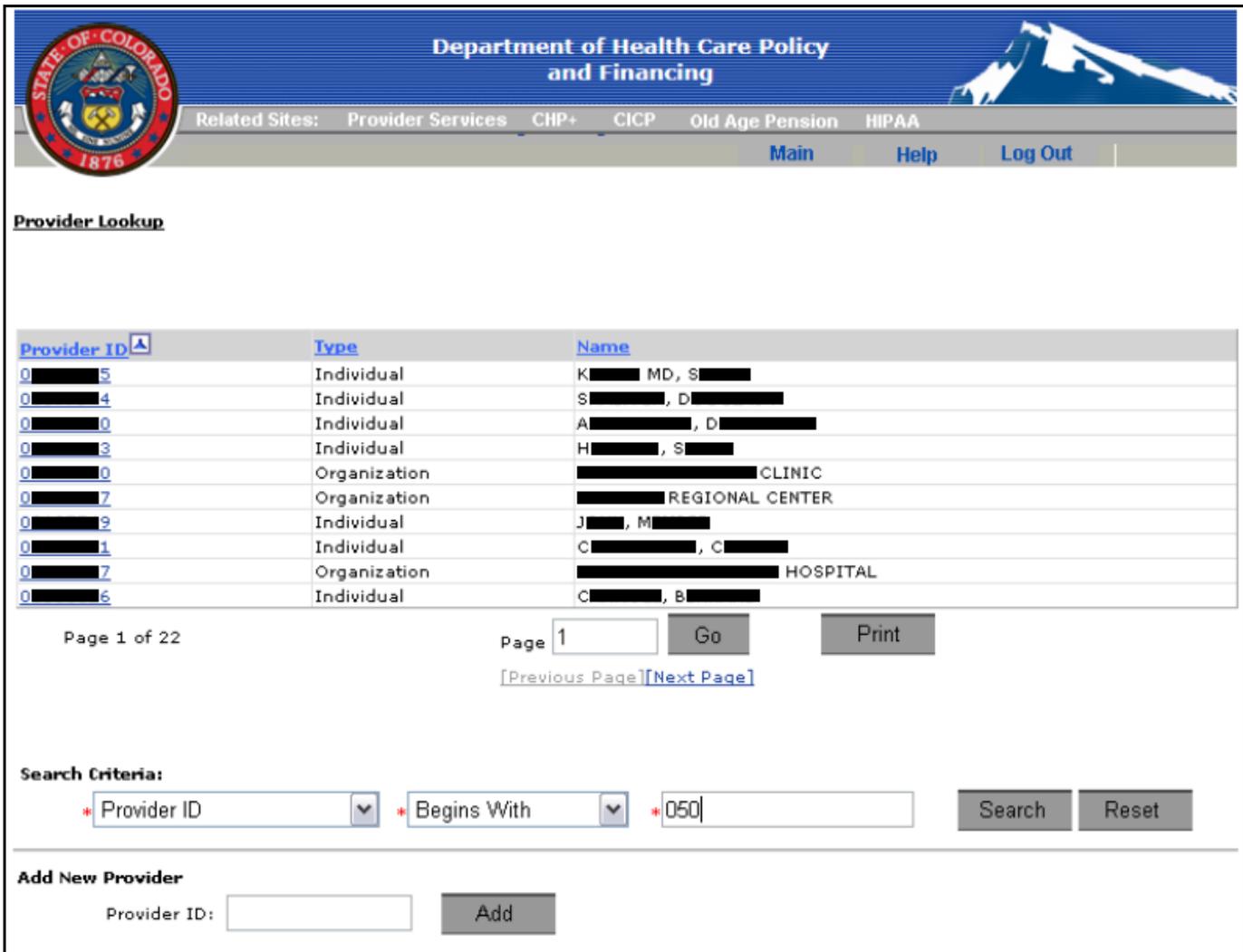
## Using the Display Grid

The display grid in the middle of the screen contains columns of information that can be:

- Sorted – Click on any of the column titles to sort the display grid by that column and click it again to sort it back.
- Scrolled – Click on the [\[Previous Page\]](#) or [\[Next Page\]](#) links below the grid.
- Skipped – Type the screen number in the box below the grid and click **Go** to jump to the screen number specified.

## Search for a Provider

- Select a column (**Provider ID, Type, Name**) in the first search box by using the drop-down button.
- Select a search method (**Exact Match, Begins With, Contains**) in the second box.
- Type in the characters you want to search in the last box (Figure 10).



Department of Health Care Policy and Financing

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

### Provider Lookup

<a href="#">Provider ID</a>	<a href="#">Type</a>	<a href="#">Name</a>
0 [REDACTED] 5	Individual	K [REDACTED] MD, S [REDACTED]
0 [REDACTED] 4	Individual	S [REDACTED], D [REDACTED]
0 [REDACTED] 0	Individual	A [REDACTED], D [REDACTED]
0 [REDACTED] 3	Individual	H [REDACTED], S [REDACTED]
0 [REDACTED] 0	Organization	[REDACTED] CLINIC
0 [REDACTED] 7	Organization	[REDACTED] REGIONAL CENTER
0 [REDACTED] 9	Individual	J [REDACTED], M [REDACTED]
0 [REDACTED] 1	Individual	C [REDACTED], C [REDACTED]
0 [REDACTED] 7	Organization	[REDACTED] HOSPITAL
0 [REDACTED] 6	Individual	C [REDACTED], B [REDACTED]

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**Search Criteria:**

\*  \*  \*       Search      Reset

**Add New Provider**

Provider ID:       Add

Figure 10 – Search example by Provider ID beginning with 050

- Click on the **Search** button to process your request – the results will appear in the display grid (Figure 11).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Provider Lookup**

<a href="#">Provider ID</a>	Type	Name
<a href="#">050-0</a>	Organization	HEALTH
<a href="#">050-4</a>	Organization	HOSPITAL
<a href="#">050-3</a>	Organization	HOSPITAL ASSOC
<a href="#">050-2</a>	Organization	HOSPITAL
<a href="#">050-0</a>	Organization	HOSPITAL DIST
<a href="#">050-8</a>	Organization	REG MED CN
<a href="#">050-6</a>	Organization	INC
<a href="#">050-2</a>	Organization	HEALTH AND HOSP
<a href="#">050-6</a>	Organization	DBA
<a href="#">050-3</a>	Organization	HOSPITAL CENTRAL

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**Search Criteria:**

\*  \*  \*

**Add New Provider**

Provider ID:

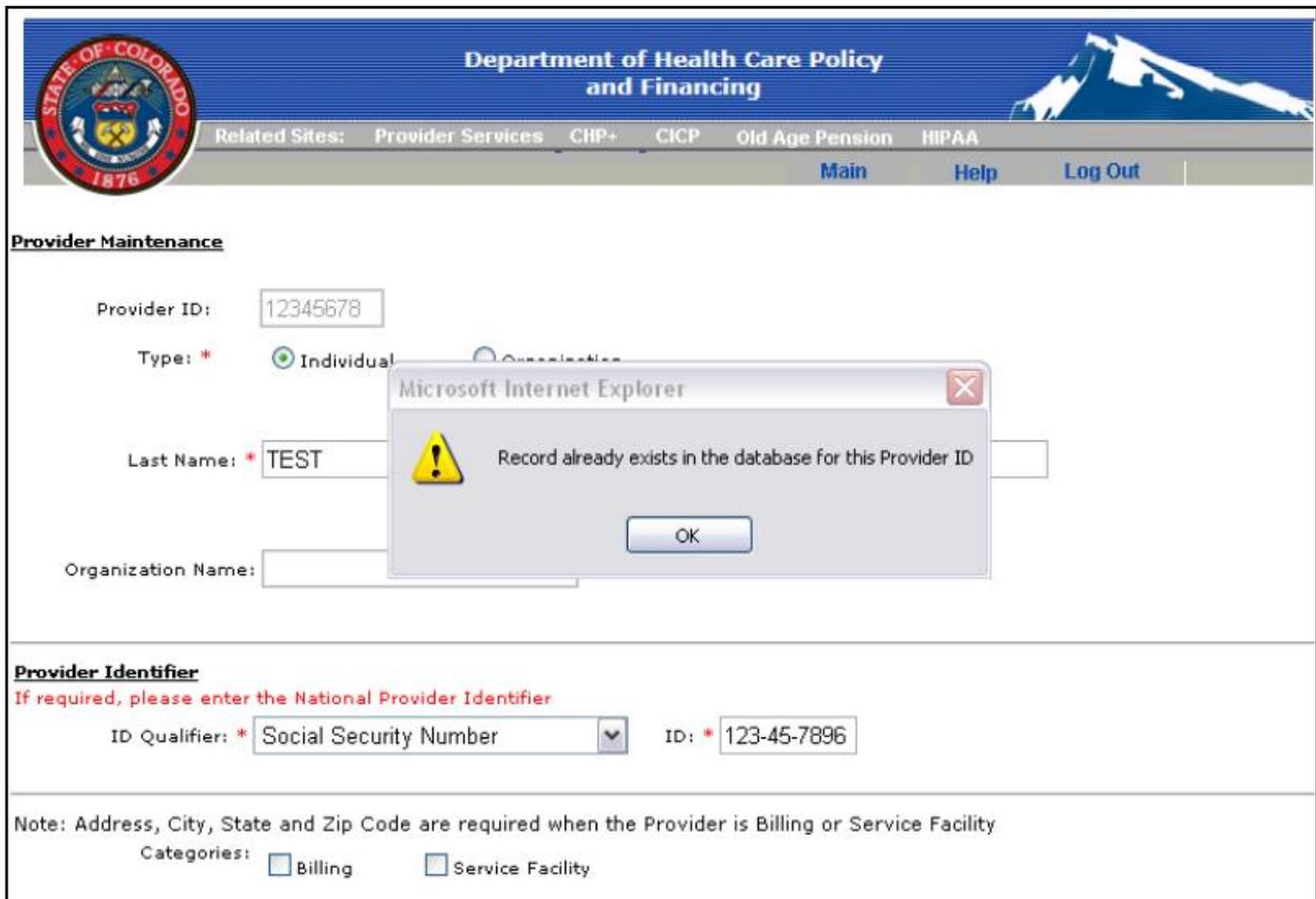
**Figure 11 – Search results**

- Click on the **Reset** button to clear the search results and return to the default view of the display grid.

## Using the Provider Maintenance Screen

There are two ways to open the Provider Maintenance screen:

- Perform a search to display the provider in the grid and click on the **Provider ID** link.
- Enter a new **Provider ID** in the **Provider ID** entry box at the bottom of the screen and click on the **Add** button. If the provider number already exists, an error will display (Figure 12).



The screenshot displays the "Provider Maintenance" screen from the Department of Health Care Policy and Financing. The page header includes the State of Colorado logo and navigation links for "Main", "Help", and "Log Out". The main form area contains fields for "Provider ID" (12345678), "Type" (Individual selected), "Last Name" (TEST), and "Organization Name". A "Microsoft Internet Explorer" error dialog box is overlaid on the form, displaying a yellow warning icon and the message: "Record already exists in the database for this Provider ID". Below the error message is an "OK" button. Below the main form is the "Provider Identifier" section, which includes a red instruction: "If required, please enter the National Provider Identifier". It features a dropdown for "ID Qualifier" (Social Security Number) and an "ID" field (123-45-7896). At the bottom, a note states: "Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility". Below the note are two radio button options: "Billing" and "Service Facility".

**Figure 12** – Error message when adding a new provider when the provider number already exists

- Click on the **OK** button.
- Click on the **Cancel** button to return to the Provider Lookup screen. The information for the existing provider will not be changed.

The Provider Maintenance screen allows you to update or delete provider information or add the required information for a new provider in the database.

- If you are updating the provider information, make the necessary changes in the entry boxes and click on the **Save** button (Figure 13).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

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**Provider Maintenance**

Provider ID:

Type: \*  Individual  Organization

Last Name: \*  First Name: \*

Organization Name:

---

**Provider Identifier**

If required, please enter the National Provider Identifier.

ID Qualifier: \*  ID: \*

---

Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility

Categories:  Billing  Service Facility

Address:

City:

State:  Zip Code:

---

**Contact Information**

Name:

---

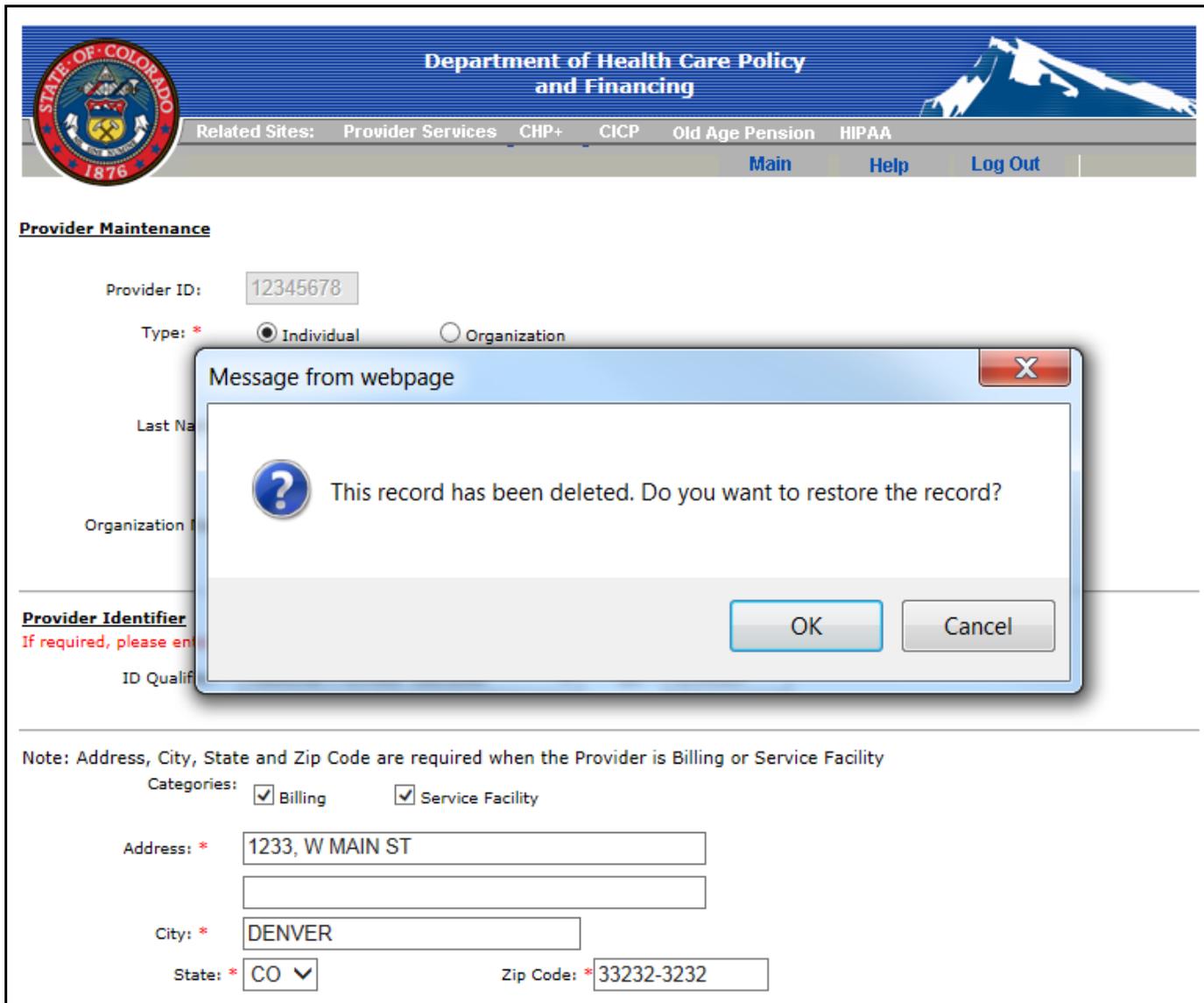
**Figure 13 – Provider Maintenance screen open for editing**

- If deleting the provider, click the **Delete** button. A delete confirmation box will appear (Figure 14). Click on **OK** to process the request.

The screenshot shows the 'Provider Maintenance' page of the Department of Health Care Policy and Financing. The page header includes the state seal of Colorado and navigation links for 'Main', 'Help', and 'Log Out'. The main content area is divided into sections: 'Provider Maintenance', 'Provider Identifier', and 'Contact Information'. The 'Provider Maintenance' section contains fields for 'Provider ID' (12345678), 'Type' (radio buttons for Individual and Organization), 'Last Name' (LNAME), 'First Name' (FNAME), and 'Organization Name'. The 'Provider Identifier' section includes 'ID Qualifier' (National) and a note about address information. The 'Contact Information' section has 'Name' and a dropdown menu. At the bottom are 'Save', 'Cancel', and 'Delete' buttons. A modal dialog box titled 'Message from webpage' is overlaid in the center, asking 'Are you sure you want to delete the record?' with 'OK' and 'Cancel' buttons.

Figure 14 – Delete confirmation box

- A previously deleted provider may be restored to the database. To restore a deleted provider, enter the **Provider ID** in the **Provider ID** entry field on the Provider Lookup screen and click the **Add** button. The system will respond by displaying the deleted provider information with a dialog box confirming the restoration of the record (Figure 15). To restore the provider, click on the **OK** button. Click on **Cancel** to keep the provider deleted.



**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Provider Maintenance**

Provider ID:

Type: \*  Individual  Organization

Last Name:

Organization Name:

**Provider Identifier**

If required, please enter the following information:

ID Qualification:

Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility

Categories:  Billing  Service Facility

Address: \*

City: \*

State: \*  Zip Code: \*

Message from webpage

? This record has been deleted. Do you want to restore the record?

OK Cancel

**Figure 15 – Restoring a deleted provider**

- If adding a new provider, enter the **Provider ID** in the **Provider ID** field on the Provider Lookup screen and click the **Add** button. Enter the required information on the Provider Maintenance screen and click on the **Save** button. If errors are encountered when the **Save** button is clicked, the errors will display in red at the top of the screen (Figure 16). Correct the errors and click on the **Save** button.

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Provider Maintenance**

- First name must be entered
- Last name must be entered
- Secondary ID Qualifier must be selected.
- Secondary ID must be entered

Provider ID:

Type: \*  Individual  Organization

Last Name: \*  First Name: \*

Organization Name:

---

**Provider Identifier**

If required, please enter the National Provider Identifier.

ID Qualifier: \*  ID: \*

---

Note: Address, City, State and Zip Code are required when the Provider is Billing or Service Facility

Categories:  Billing  Service Facility

Address:

City:

State:  Zip Code:

---

**Contact Information**

Name:

**Figure 16 – Possible errors when adding a new provider**

- Click on the **Cancel** button if you want to return to the Provider Lookup screen and not complete the request.

## Medicaid Provider Lookup

The Medicaid Provider Lookup (Figure 17) allows you to query the most recent MMIS provider file to view provider information. Although you are not required to restrict your results using a search, it is recommended as the system will display the entire MMIS provider file if the **Search** button is clicked and no search criteria has been specified.

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICIP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

### Medicaid Provider Lookup

**General Criteria:**  
Provider Type: --No Preference--  
Provider's Last Name or Clinic Name Begins With:

**Location Criteria:**  
City:  
State: Colorado  
Zip:  
County: --No Preference--

**Specialty Criteria:**  
Adolescent Medicine  
Adult Day Service  
Allergy  
Allergy, Pediatric  
Anesthesiology  
BI Adult Day Service  
BI Assistive Technology  
BI Behavioral Programming  
BI Day Treatment  
BI Indep Living Skills Train  
BI Institutional Respite Care  
BI Mental Health Counseling  
BI Personal Care Service  
BI Respite Care  
BI Substance Abuse Counseling  
BI Supported Living Program

To Select Multiple Specialties, hold down the CTRL key.

This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients.

12 per page Search Reset

Figure 17 – Provider Specialty Lookup screen

To search for providers, three types of search criteria sections are provided. You can use all three at the same time or any combination of the three. The search criteria sections are:

**General Criteria:** This section provides for a search by **Provider Type** and the **Provider's Last Name or Clinic Name Begins With**.

**Location Criteria:** This section provides for a search by **City, State, Zip Code, and County**.

**Specialty Criteria:** This section provides for a search based on **Specialty**. Multiple specialties can be searched for at the same time by holding down the **Ctrl** key and clicking on the specialties needed.

If a specific **Provider Type** is selected from the drop-down box, the specialties listed in the **Specialty Criteria** box will change to match the **Provider Type** chosen (Figure 18).

**Department of Health Care Policy and Financing**

Related Sites: [Provider Services](#) [CHP+](#) [CICP](#) [Old Age Pension](#) [HIPAA](#)

[Main](#) [Help](#) [Log Out](#)

**Medicaid Provider Lookup**

**General Criteria:**  
Provider Type:   
Provider's Last Name or Clinic Name Begins With:

**Location Criteria:**  
City:   
State:   
Zip:   
County:

**Specialty Criteria:**

- Cardiology/Cardiovascular Disease
- Dental, Family Practitioner
- Dental-General Practitioner
- Dental-Hygienist
- Direct Pay
- General Practice
- Indirect Pay
- Internal Medicine
- Oral Surgeon (Dentists)
- Orthodontia
- Pediatric Dentist
- Pediatrics
- Periodontics
- Prosthodontics
- Surgery, Oral & Maxillofacial

To Select Multiple Specialties, hold down the CTRL key.

**This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients.**

12 per page

**Figure 18 – Dental Provider Type with Dental specialties**

If the search criteria you specify does not find any matching providers, a message will be displayed in red on the criteria screen stating that no providers matched (Figure 19).

The screenshot shows the Department of Health Care Policy and Financing website. The header includes the state seal and navigation links for Provider Services, CHP+, CACP, Old Age Pension, and HIPAA. The main content area is titled "Medicaid Provider Lookup" and displays a red message: "No providers matched your criteria. Please try again." Below this, there are sections for "General Criteria" (Provider Type: Community Mntl Hlth Center, Last Name or Clinic Name Begins With: [redacted]), "Location Criteria" (City, State: Colorado, Zip, County: --No Preference--), and "Specialty Criteria" (a large empty box). A note on the right says "To Select Multiple Specialties, hold down the CTRL key." At the bottom, there is a disclaimer: "This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients." and a search bar with "12 per page", "Search", and "Reset" buttons.

Figure 19 – Search resulting in no matching providers

Revise your search criteria and click on the **Search** button again to obtain new results.

The Provider Specialty Listing will display in a columnar format with the provider name, address and phone numbers (Figure 20).

The screenshot shows the header of the Department of Health Care Policy and Financing website. It includes the State of Colorado seal, the department name, and navigation links for Related Sites (Provider Services, CHP+, CACP, Old Age Pension, HIPAA), Main, Help, and Log Out. Below the header, the page title is "Medicaid Provider Report". The main content area displays information for "SURGERY CENTER LLC", an Ambulatory Surgical Center specializing in Orthopedics. The address is partially redacted with black boxes, showing "AVE STE B", ", CO - ", "County", and "(970) ". A disclaimer states: "This lookup contains providers enrolled with Medicaid; it does not identify providers who are currently accepting new patients." At the bottom, there is a "Page 1 of 1" indicator, a "Page" input field, and buttons for "GO", "Print", and "Back". There are also links for "[Previous Page]" and "[Next Page]".

Figure 20 – Provider Specialty Listing

The list can be scrolled through by using the scroll bar located at the right of the screen, when applicable. Located at the bottom of the screen are navigational buttons and links to assist with paging through results and obtaining printed output of the listing. Click on the **Print** button to send the list to the printer. To return to the Provider Specialty Lookup screen, click on the **Back** button.