



# Atrezzo User Guide Provider Portal



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The purpose of this user guide is to provide an overview of the Provider Portal for Atrezzo, the Kepro proprietary system. Atrezzo is a person-centered, web-based care mangagement solution that transforms traditional, episodic-based care management into proactive and collaborative population healthcare management.

Atrezzo is a web-based system that works across numerous internet browsers; however, Chrome is preferred and system functionality is enhanced with this platform.

## Access & Registration

All providers will designate a Provider Administrator for their facility. This person will need to add and manage all other users of the Provider Portal.

The process to request access will vary, but generally includes a request form with the below information. Once the registration form is submitted, the Provider Administrator will receive a registration code which will be used to complete the registration process.



**Helpful Hint**

Bookmark the Provider Portal URL for future use

The Provider Portal is accessible at <https://portal.kepro.com>.

Upon initial login, the Provider Administrator should follow the below steps to complete registration.

Click Register here under the Login section and enter the facility NPI and registration code received from Kepro.

Kepro™

**LOGIN**

USERNAME \*

PASSWORD \*

LOGIN >

If you don't already have a Kepro account, you can [register here.](#)

[Forgot Password?](#)

Kepro™

Create a New Account - Specify Your Organization

NPI \*

PROVIDER REGISTRATION CODE \*

< LOGIN      NEXT >

Please refer to the registration section of the Atrezzo Connect Provider Portal End User Guide for more information on how to register. You can find this document on your payer-specific Kepro website.



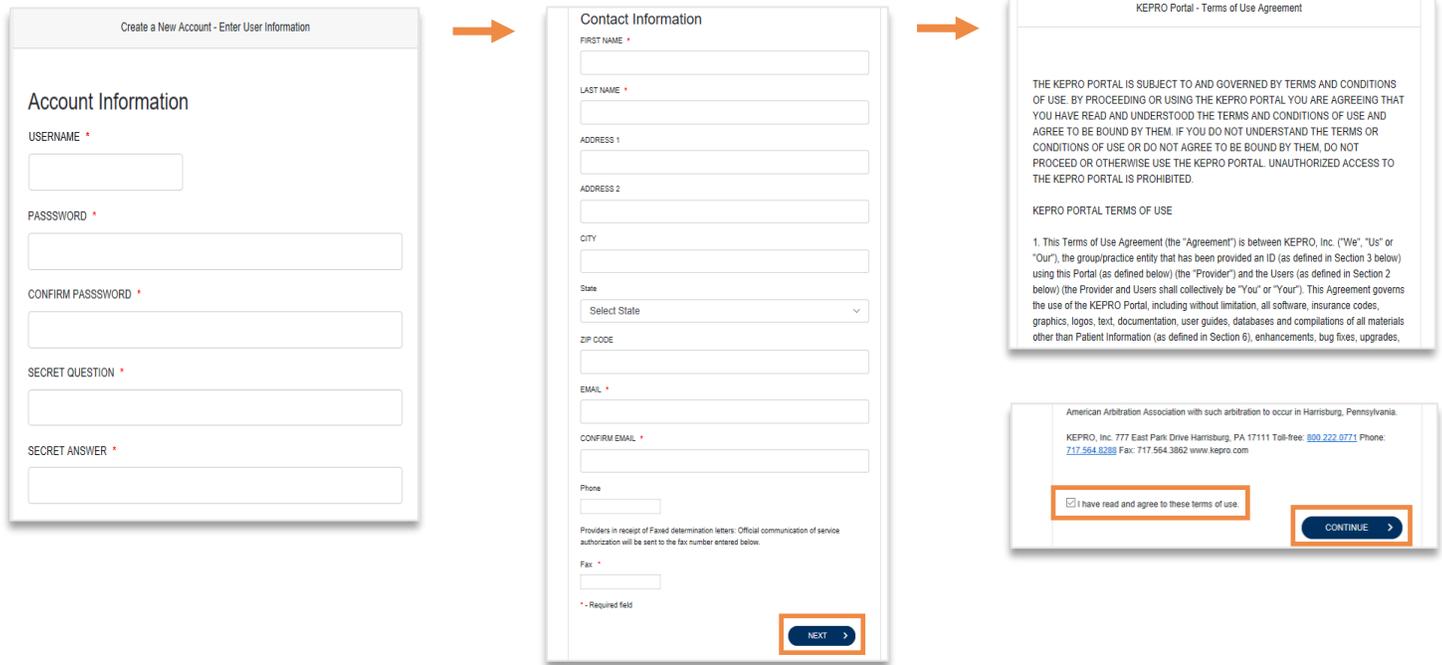
Complete the Account Information section by creating a username, password, security question and answer. This will be used to reset the password in the future if needed.

Complete the Contact Information Section, click **NEXT** >

Review the Terms of Use Agreement, click the acknowledgement check box, and then click **CONTINUE** >

### Helpful Hints

- The username and password created here will be used by the Provider Administrator account login
- Passwords must be 8-16 characters
  - One upper case letter
  - One lower case letter
  - One number
  - One special character



## System Navigation

Navigation of Atrezzo will remain consistent throughout use despite user role. The left navigation index will remain in place regardless of navigation through the system. This functionality allows for quick and easy navigation from any screen.

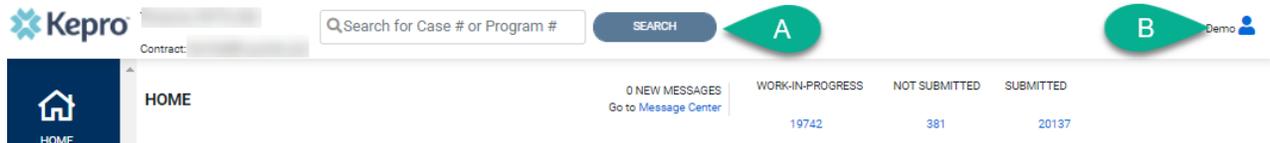
Utilize the below legend for a brief overview of each area within Atrezzo. For a more detailed description, and for all available workflows, click the icon hyperlink.

 HOME	<b>Home</b>	This is the default page upon successful login and will enable you to view submitted cases and any pending submissions.
 CASES	<b>Cases</b>	This section will enable you to search cases based on specific parameters including case type, case status and request type To identify specific cases and ensure efficient search results, try selecting specific information in each drop down to narrow search results.
 CREATE CASE	<b>Create Case</b>	This section will enable you to create a new case for a consumer. Required fields include the case type, consumer information, and case parameters. Some fields will auto populate based on user role. Additional fields appear based on selections made.
 CONSUMERS	<b>Consumers</b>	This section will enable you to search for Consumer specific information utilizing the Consumer ID or last name and date of birth. Consumer specific data will render based on information entered.
 SETUP	<b>Setup</b>	Visible to Provider Administrator users only. This section will enable Provider Administrators to manage, edit, and add provider users for the facility.
 MESSAGE CENTER	<b>Message Center</b>	This section will enable users to communicate directly with the team at Kepro regarding specific Consumers and/or cases.
 REPORTS	<b>Reports</b>	This section will display all available reports for those who have access. The report icon will not be visible to those users or contracts who do not have access to reports User specific reports will be listed on this page, no search required.
 Help	<b>Help</b>	This section will display available information including User Guides, FAQs, Latest Release Notes, and Password Guidelines.

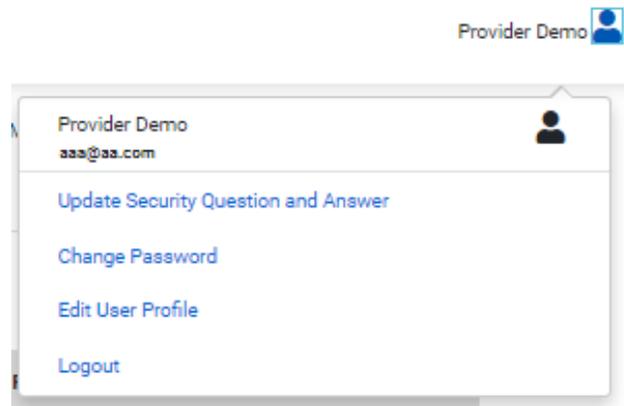
## General System Features

This section will highlight the features found on all screens throughout the system and provide information on how to utilize these features for optimal navigation. The ability to search and view profile information will appear on all pages throughout the system, regardless of navigation.

After successful login, the system will default to the Home Screen, which is also the Work Queue search page. See below for the feature present on all pages throughout the system to assist with navigation.



- A. To search a Case # or Program #, enter specified information in this box and click Search (see [Searching by Case ID](#) for step by step instructions).
- B. This section will identify the user logged in. Click on the  icon in the upper right corner to open menu options where you can Update Security Question & Answer, Change Password, Edit User Profile, or Logout.



## Home Screen View

Once successfully logged in, the user will be taken to the Atrezzo Home Screen which will default to display all "Requests Saved But Not Submitted". This will provide a list of Consumers with cases that have been started, but are incomplete and have not been submitted to Kepro.

HOME		0 NEW MESSAGES <a href="#">Go to Message Center</a>	WORK-IN-PROGRESS 19742	NOT SUBMITTED 381	SUBMITTED 20137
<b>Request Saved But Not Submitted</b>					
CONTRACT	☺ CASE TYPE	CONSUMER ID	CONSUMER NAME	DATE OF BIRTH	LAST MODIFIED
[REDACTED]	UM	11199307587	[REDACTED]	[REDACTED]	3/23/2020 8:36:44 AM
[REDACTED]	UM	01206924067	[REDACTED]	[REDACTED]	3/19/2020 3:37:45 PM
[REDACTED]	UM	06044718801	[REDACTED]	[REDACTED]	2/26/2020 6:29:04 AM
[REDACTED]	UM	01199789547	[REDACTED]	[REDACTED]	2/25/2020 6:55:11 AM

To complete an un-submitted case, you can click the edit icon that will appear when hovering over the specified Consumer line, or complete a full search for un-submitted cases with specific parameters (see the [Cases](#) section for the steps to complete a full search). If you know the Case ID, you can enter it in the search bar at the top of the page for direct navigation (see the section on [Search by Case ID](#) for detailed steps)

HOME		0 NEW MESSAGES <a href="#">Go to Message Center</a>	WORK-IN-PROGRESS 19742	NOT SUBMITTED 381	SUBMITTED 20137
<b>Request Saved But Not Submitted</b>					
CONTRACT	☺ CASE TYPE	CONSUMER ID	CONSUMER NAME	DATE OF BIRTH	LAST MODIFIED
[REDACTED]	UM	11199307587	[REDACTED]	[REDACTED]	3/23/2020 8:36:44 AM
[REDACTED]	UM	01206924067	[REDACTED]	[REDACTED]	3/19/2020 3:37:45 PM
[REDACTED]	UM	06044718801	[REDACTED]	[REDACTED]	2/26/2020 6:29:04 AM
[REDACTED]	UM	01199789547	[REDACTED]	[REDACTED]	2/25/2020 6:55:11 AM



## Cases

This section will identify the steps to search for cases based on selected search parameters. This section is searchable by Case or Consumer. Select the specific search on the top.

To search By Case, select the Case Type from the drop down. Available sections will vary based on contract and user role. Once the Case Type is specified, additional search parameters will appear. To identify specific cases and ensure efficient search results, try selecting specific information in each drop down to narrow search results.

**Note:** You must enter a submitted date span for search results to render.

**CASES**

BY CASE  BY CONSUMER

CASE TYPE \*  
Assessment

CASE STATUS REASON ASSESSMENT TYPE REQUEST TYPE  
Select One Select One Select One Select One

SUBMITTED FROM DATE SUBMITTED TO DATE  
MM/DD/YYYY MM/DD/YYYY

SEARCH

To search By Consumer, enter the required Member information. For results to render, user must enter Last Name and DOB or Member ID.

**CASES**

BY CASE  BY CONSUMER

MEMBER ID LAST NAME DATE OF BIRTH SEARCH CONTEXT  
MM/DD/YYYY All Related Submitting Providers

\*Combination of DOB and Last Name or Member ID is required

SEARCH

Search results will render below. The Case ID is a hyperlink which will open the specified Case page.

CASE ID	CONSUMER NAME	SUBMITTED ON	CASE STATUS	REASON	ASSESSMENT TYPE	REQUEST TYPE	
<a href="#">202240001</a>		8/11/2020 1:37:20 PM	Submitted	PASRR Level 1	PASRR Level I	Temporary NH Provider	
DIAGNOSIS ILLNESS UNSPECIFIED						OUTCOME:	LETTERS: 0 MESSAGES: 0
<a href="#">202240002</a>		8/11/2020 1:39:11 PM	Submitted	PASRR Level 1	PASRR Level I	Temporary NH Provider	
DIAGNOSIS						OUTCOME:	LETTERS: 0 MESSAGES: 0
<a href="#">202240003</a>		8/11/2020 2:03:15 PM	Submitted	PASRR Level 1	PASRR Level I	Temporary NH Provider	
DIAGNOSIS						OUTCOME:	LETTERS: 0 MESSAGES: 0

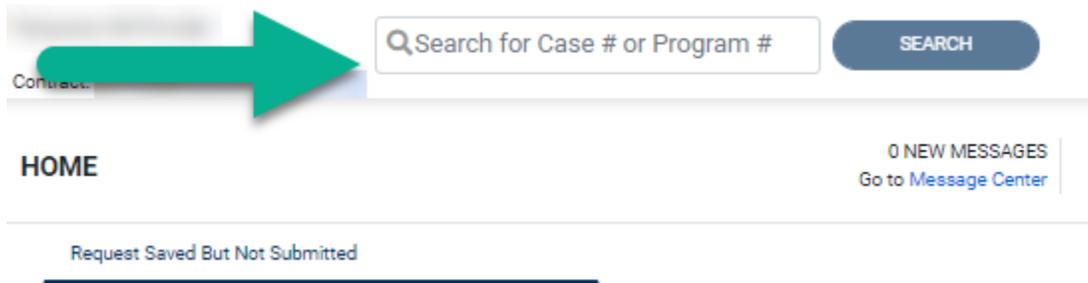
Click the Case ID hyperlink to be directed to the Case page.

### Search by Case ID

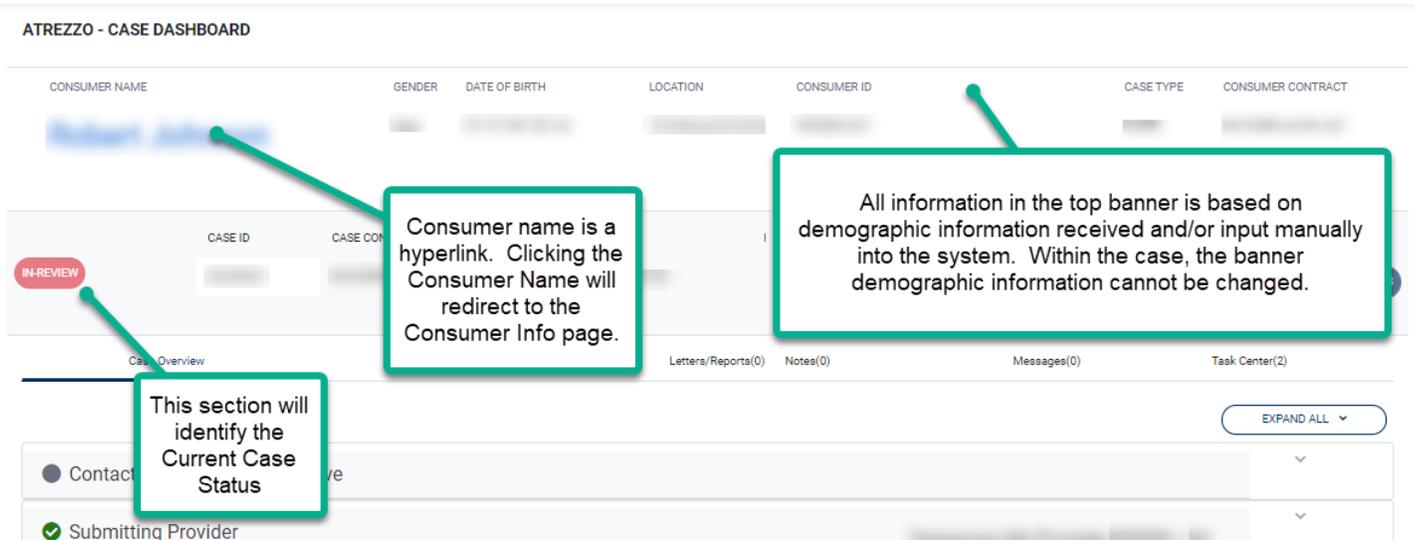
This section will identify the steps necessary to complete a search for active cases when you already know the Case ID.

To search directly for a case, enter the Case ID in the search box on the top left of any page.

Then click  to be directed to the specified case.



The visible information within the Case will vary by contract and user role, but will be in Read-Only format.



**ATREZZO - CASE DASHBOARD**

CONSUMER NAME	GENDER	DATE OF BIRTH	LOCATION	CONSUMER ID	CASE TYPE	CONSUMER CONTRACT
<a href="#">[Consumer Name]</a>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

**IN-REVIEW** (Status)

CASE ID: [Redacted] CASE CON: [Redacted]

Case Overview

Letters/Reports(0) | Notes(0) | Messages(0) | Task Center(2)

EXPAND ALL

Contact [Redacted]

Submitting Provider [Redacted]

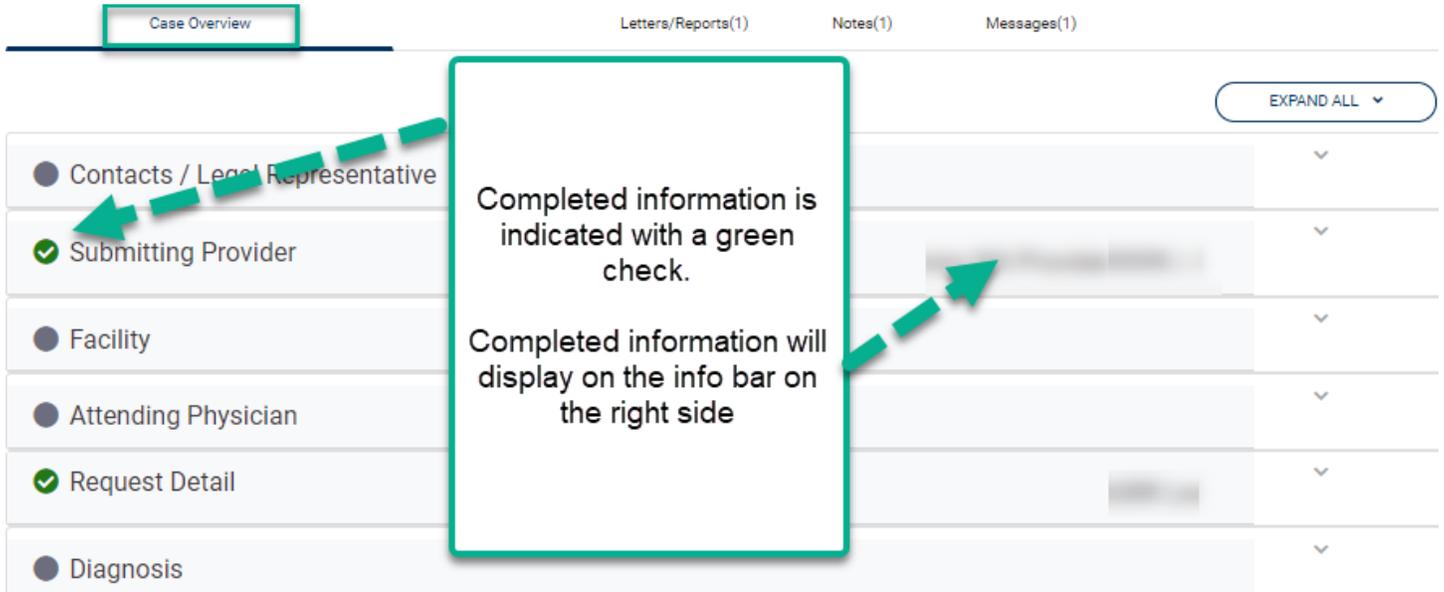
**Callout 1:** Consumer name is a hyperlink. Clicking the Consumer Name will redirect to the Consumer Info page.

**Callout 2:** All information in the top banner is based on demographic information received and/or input manually into the system. Within the case, the banner demographic information cannot be changed.

**Callout 3:** This section will identify the Current Case Status

## Case Overview

This section will provide an overview of the current case including Submitting Provider, Facility (if applicable), Attending Physician, Request Detail, and Diagnosis. In most cases, only Submitting Provider and Request Detail will be completed.



Case Overview Letters/Reports(1) Notes(1) Messages(1)

EXPAND ALL

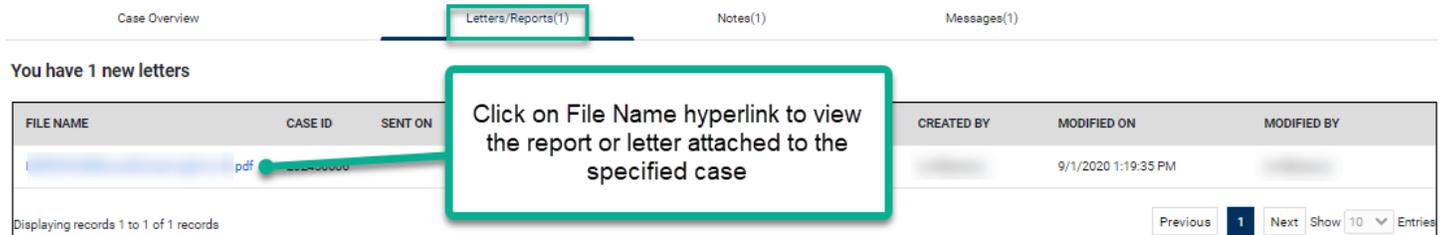
- Contacts / Legal Representative
- ✓ Submitting Provider
- Facility
- Attending Physician
- ✓ Request Detail
- Diagnosis

Completed information is indicated with a green check.

Completed information will display on the info bar on the right side

## Letters/Reports

This section will display any applicable letters or reports that have been uploaded specific to this case. Clicking on the hyperlink to view the letter/report will open item outside the internet browser.



Case Overview Letters/Reports(1) Notes(1) Messages(1)

You have 1 new letters

FILE NAME	CASE ID	SENT ON	CREATED BY	MODIFIED ON	MODIFIED BY
[Hyperlink]	[Case ID]	[Date]	[User]	9/1/2020 1:19:35 PM	[User]

Click on File Name hyperlink to view the report or letter attached to the specified case

Displaying records 1 to 1 of 1 records

Previous 1 Next Show 10 Entries

## Notes

This section will display any notes pertaining to the specified case. This will include notes from Kepro or entered by the Provider. This section is designated for notes only and should not include clinical information.

Case Overview      Letters/Reports(1)      **Notes(1)**      Messages(1)

---



**Provider Demo**  
9/1/2020 1:08:21 PM

External Note

## Messages

This section will display any messages to or from Kepro or the Client.

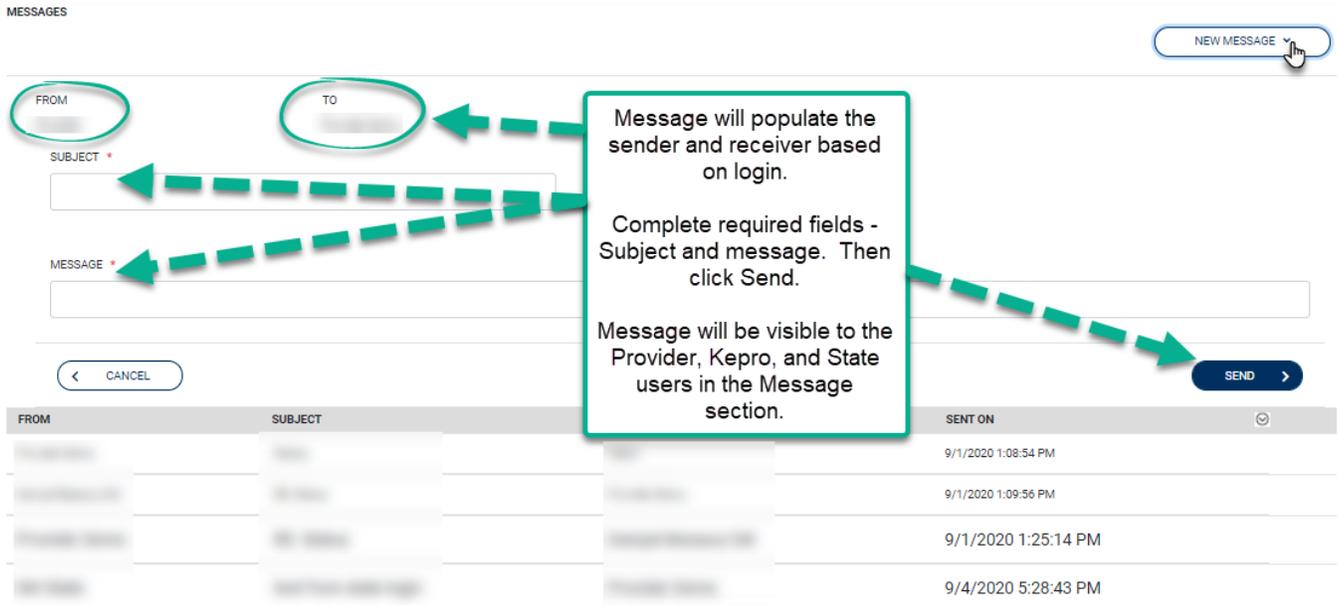
Case Overview      Letters/Reports(1)      Notes(1)      **Messages(1)**

---

MESSAGES NEW MESSAGE ▾

FROM	SUBJECT	TO	SENT ON	📧
[blurred]	Status	[blurred]	9/1/2020 1:08:54 PM	
[blurred]	RE: Status	[blurred]	9/1/2020 1:09:56 PM	
[blurred]	RE: Status	[blurred]	9/1/2020 1:25:14 PM	

To enter a new message, click **NEW MESSAGE** in the upper right corner. Message fields will populate. Complete the required fields, then select Send.



The screenshot shows the 'MESSAGES' section of the Kepro interface. In the top right corner, there is a 'NEW MESSAGE' button with a dropdown arrow. Below this, a form for creating a new message is displayed. The form includes fields for 'FROM', 'TO', 'SUBJECT', and 'MESSAGE'. A callout box with a green border and dashed arrows pointing to the 'FROM', 'TO', 'SUBJECT', and 'MESSAGE' fields contains the following text:

- Message will populate the sender and receiver based on login.
- Complete required fields - Subject and message. Then click Send.
- Message will be visible to the Provider, Kepro, and State users in the Message section.

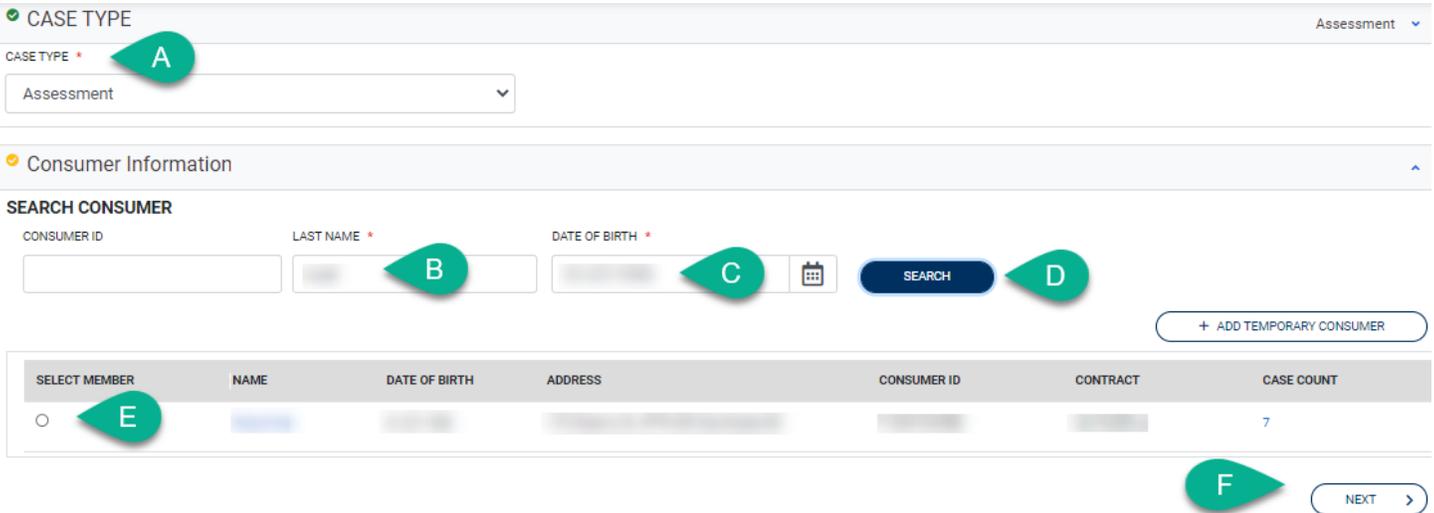
At the bottom of the form, there are 'CANCEL' and 'SEND' buttons. Below the form is a table of messages with columns for 'FROM', 'SUBJECT', and 'SENT ON'.

FROM	SUBJECT	SENT ON
		9/1/2020 1:08:54 PM
		9/1/2020 1:09:56 PM
		9/1/2020 1:25:14 PM
		9/4/2020 5:28:43 PM

## Create Case

This section will identify the steps to create a new case request. In the left navigation index, click Create Case.

Select the proper case type, then search for the consumer using the last name and date of birth. If the correct consumer match is found, click the radio button to select the consumer, then click Next to proceed with the case.



**CASE TYPE** Assessment

**Consumer Information**

**SEARCH CONSUMER**

CONSUMER ID:  LAST NAME:  DATE OF BIRTH:

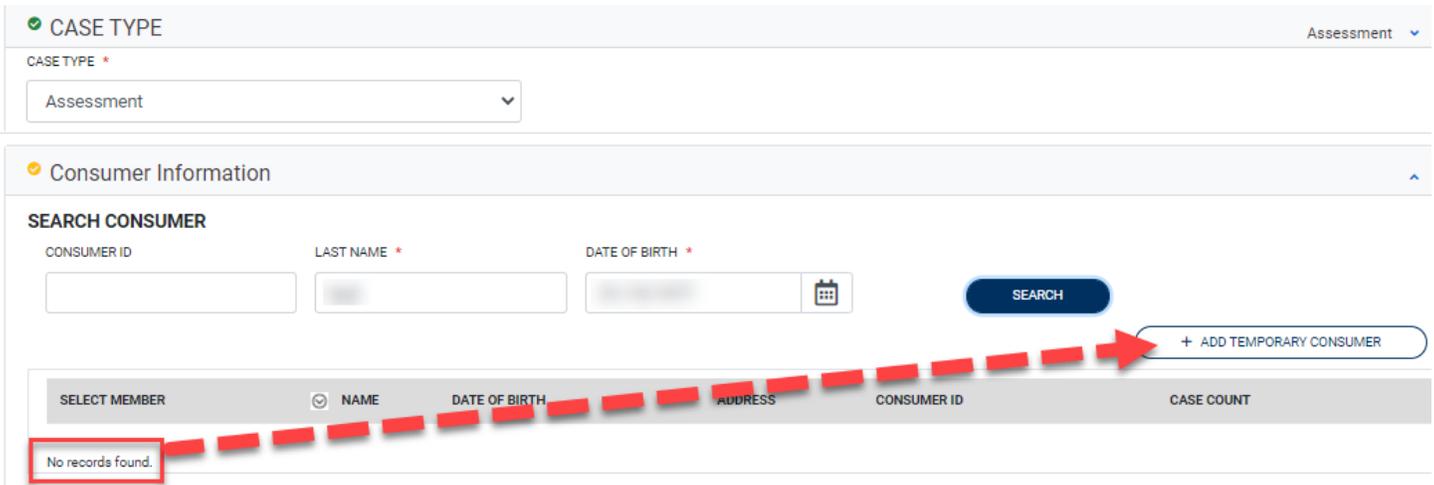
SEARCH

+ ADD TEMPORARY CONSUMER

SELECT MEMBER	NAME	DATE OF BIRTH	ADDRESS	CONSUMER ID	CONTRACT	CASE COUNT
<input checked="" type="radio"/>						7

NEXT

If a consumer match is not found, click [+ ADD TEMPORARY CONSUMER](#) to add the consumer to the system.



**CASE TYPE** Assessment

**Consumer Information**

**SEARCH CONSUMER**

CONSUMER ID:  LAST NAME:  DATE OF BIRTH:

SEARCH

+ ADD TEMPORARY CONSUMER

SELECT MEMBER	NAME	DATE OF BIRTH	ADDRESS	CONSUMER ID	CASE COUNT
No records found.					

In order to add a consumer to the system, you must select the contract and plan.

### CONTRACT INFORMATION

CONTRACT \*  PLAN \*

To add a consumer, you must select the contract and plan before the areas below are editable.

The last name and date of birth entered when searching will auto populate on this page

### CONSUMER DETAILS

PREFIX  FIRST NAME \*  MIDDLE NAME  LAST NAME \*  SUFFIX

GENDER \*  DATE OF BIRTH \*  LANGUAGE

Enter all required fields, then select Next to proceed with the case.

CONTRACT \*  PLAN \*

### CONSUMER DETAILS

PREFIX  FIRST NAME \*  MIDDLE NAME  LAST NAME \*  SUFFIX

GENDER \*  DATE OF BIRTH \*  LANGUAGE

### CONTACT INFORMATION

USE FACILITY ADDRESS To use the Facility Address, check this box to auto-populate the below fields.

ADDRESS LINE 1 \*  ADDRESS LINE 2  CITY \*  COUNTRY \*

STATE/PROVINCE \*  COUNTY \*  POSTAL CODE \*  PHONE NUMBER

### OTHER INFORMATION

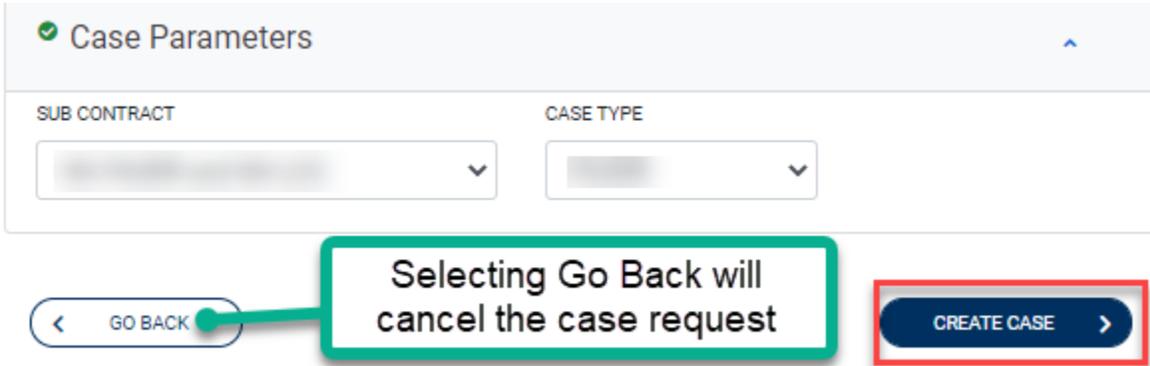
SSN (XXXXXX-XXXX)  SELF PAY  PRIVATE INSURANCE  MEDICAID ID/SUBSCRIBER ID  MEDICARE HICN

MEDICARE MBI  OTHER ID

NEXT

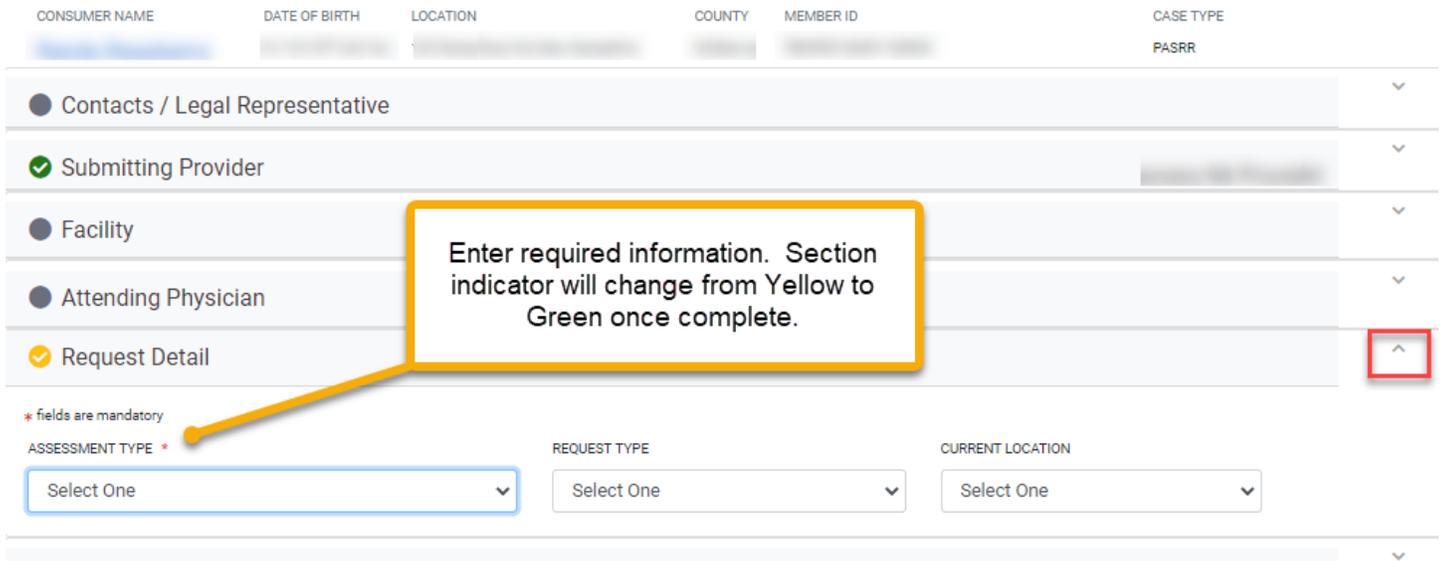
After selecting the proper Consumer, Select the proper case parameters for the request being made.

Then click 



The screenshot shows a form titled "Case Parameters" with a green checkmark icon. It contains two dropdown menus: "SUB CONTRACT" and "CASE TYPE". Below the form are two buttons: "GO BACK" (with a left arrow) and "CREATE CASE" (with a right arrow). A green callout box points to the "GO BACK" button with the text "Selecting Go Back will cancel the case request". A red box highlights the "CREATE CASE" button.

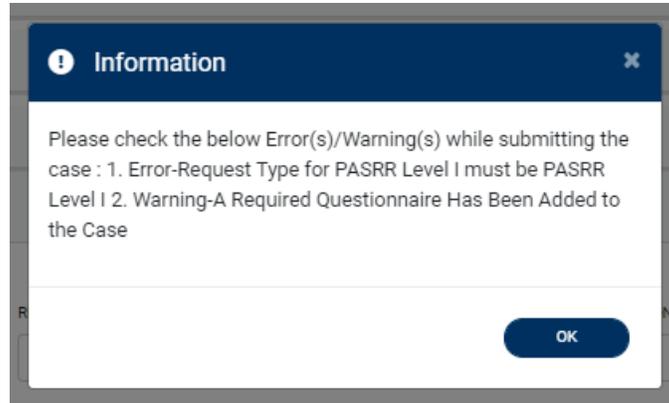
The next page that renders will be the Case page. Select the Request Detail section, by clicking the caret on the far right side.



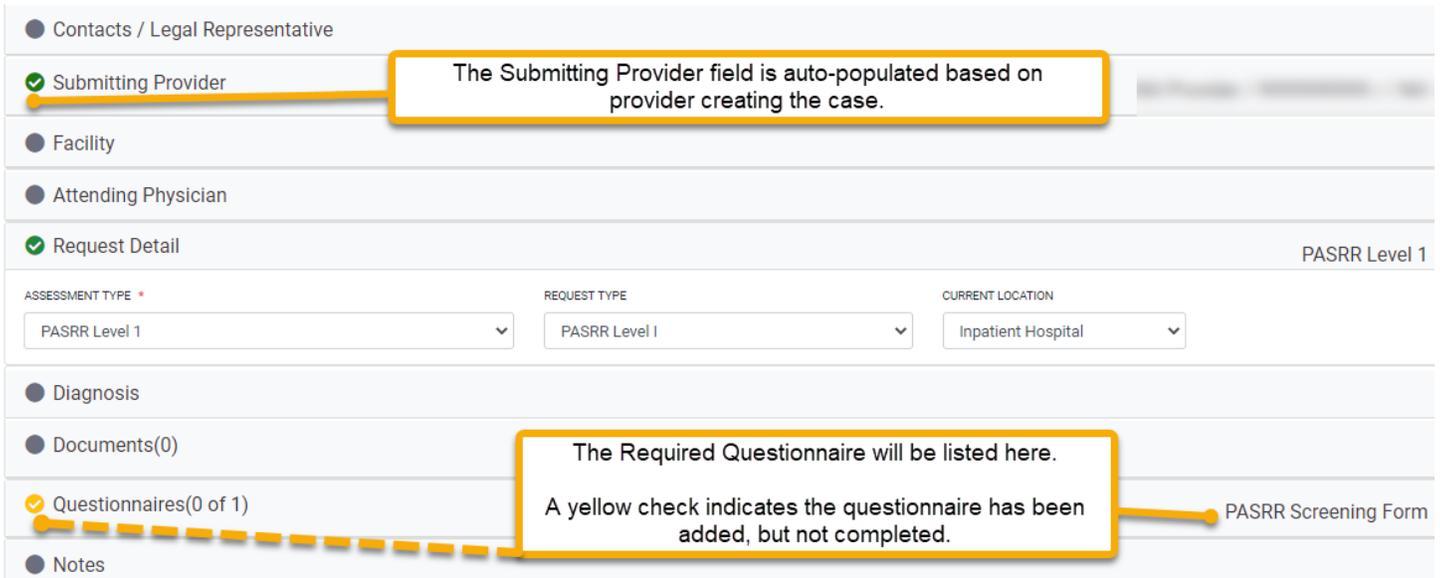
The screenshot shows a table with columns: CONSUMER NAME, DATE OF BIRTH, LOCATION, COUNTY, MEMBER ID, and CASE TYPE (PASRR). Below the table is a list of sections: "Contacts / Legal Representative", "Submitting Provider" (with a green checkmark), "Facility", "Attending Physician", and "Request Detail" (with a yellow checkmark). A yellow callout box points to the "Request Detail" section with the text "Enter required information. Section indicator will change from Yellow to Green once complete." A red box highlights the upward caret icon on the right side of the "Request Detail" section. Below the sections are three dropdown menus: "ASSESSMENT TYPE", "REQUEST TYPE", and "CURRENT LOCATION", each with "Select One" as the selected option. A note below the first dropdown says "\* fields are mandatory".

Select Assessment Type, Request Type, Current Location.

Depending on the Assessment Type selected, you will see a pop up Information Box which will confirm which request type must be selected, and which required questionnaire is being added based on the selection.



The submitting provider section will auto populate based on the provider creating the case. Complete required Request Detail Section to have appropriate Questionnaire added to the case.



The image shows a form with several sections. The "Submitting Provider" section is selected with a green checkmark. A yellow callout box points to this section with the text: "The Submitting Provider field is auto-populated based on provider creating the case." Below this is the "Request Detail" section, also selected with a green checkmark. It contains three dropdown menus: "ASSESSMENT TYPE" (PASRR Level 1), "REQUEST TYPE" (PASRR Level I), and "CURRENT LOCATION" (Inpatient Hospital). To the right of these dropdowns is the text "PASRR Level 1". Below the dropdowns are sections for "Diagnosis", "Documents(0)", "Questionnaires(0 of 1)", and "Notes". A yellow callout box points to the "Questionnaires" section with the text: "The Required Questionnaire will be listed here. A yellow check indicates the questionnaire has been added, but not completed." A yellow line connects this callout to a yellow checkmark next to "Questionnaires(0 of 1)". To the right of the "Questionnaires" section, the text "PASRR Screening Form" is visible.

Once populated, click the caret to open the Questionnaire section, then click the blue hyperlink to complete the questionnaire. The appropriate questionnaire will open in another tab within the browser. All questions will auto save throughout. Once all questions and all sections are complete, click

**MARK AS COMPLETE** >

. The questionnaire tab will automatically close and you will return to the Create Case page. All required sections will be indicated complete with a green checkmark. To submit the

request to Kepto, click

**SUBMIT** >

CONSUMER NAME	DATE OF BIRTH	LOCATION	COUNTY	MEMBER ID	CASE TYPE
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	PASRR
<input type="radio"/> Contacts / Legal Representative					▼
<input checked="" type="checkbox"/> Submitting Provider					▼
<input type="radio"/> Facility					▼
<input type="radio"/> Attending Physician					▼
<input checked="" type="checkbox"/> Request Detail					PASRR Level 1 ▼
<input type="radio"/> Diagnosis					▼
<input type="radio"/> Documents(0)					▼
<input checked="" type="checkbox"/> Questionnaires(1 of 1)					PASRR Screening Form ▼
<input type="radio"/> Notes					▼

**< CANCEL CASE** ✔ AutoSaved **SUBMIT >**



Once submitted, the case will display as In Review. During this phase, Kepro is reviewing the case.

CONSUMER NAME	GENDER	DATE OF BIRTH	LOCATION	CONSUMER ID	CASE TYPE	CONSUMER CONTRACT
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	PASRR	[Redacted]

CASE ID	CASE CONTRACT	SUBMITTED ON	REASON	OUTCOME
202550001	NH PASRR and NH LOC	9/11/2020 11:56:01 AM		

IN-REVIEW

Case Overview      Letters/Reports(0)      Notes(0)      Messages(0)

Once the review has been complete, the status will change from **IN-REVIEW** to **Completed**.

When a case review is complete, the Reason will indicate the outcome.

CONSUMER NAME	GENDER	DATE OF BIRTH	LOCATION	COUNTY	CONSUMER ID
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

CASE ID	CASE CONTRACT	SUBMITTED ON	REASON
[Redacted]	[Redacted]	9/11/2020 1:02:00 PM	Negative Screening

Completed

Case Overview      Letters/Reports(1)      Notes(1)

### Uploading Documentation

This section will provide the steps necessary to upload documents, such as clinical information into the case for review.

📄 Documents(0)

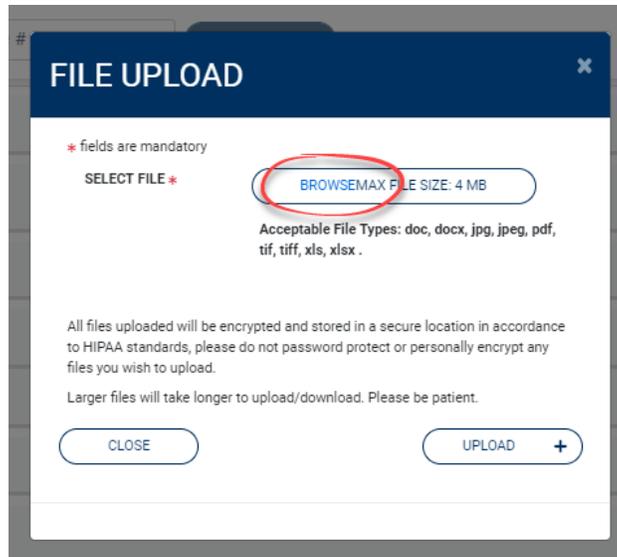
[CLICK HERE TO UPLOAD FILE](#) +

[CLICK HERE TO UPLOAD FILE](#) +

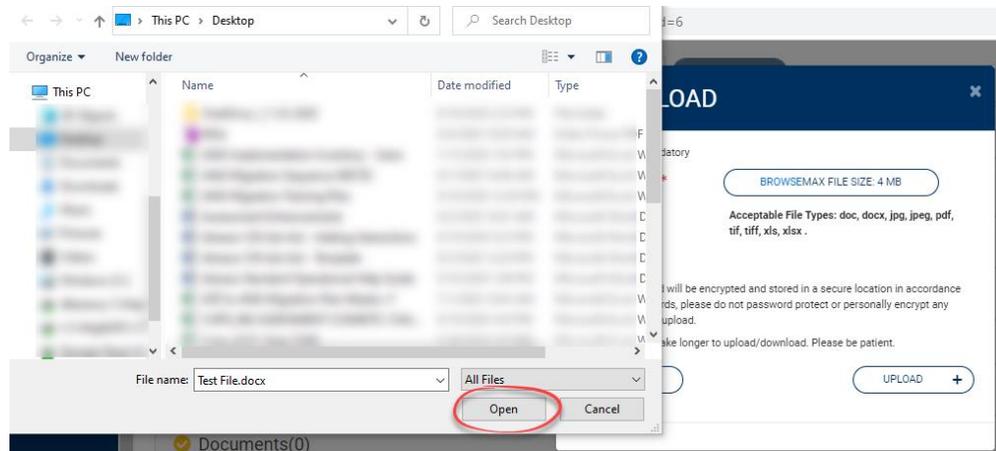
Within the designated case, expand the Documents Section and click to upload documentation.

**NOTE:** File size is limited to 4MB, larger files may need to be broken into smaller segments for successful upload.

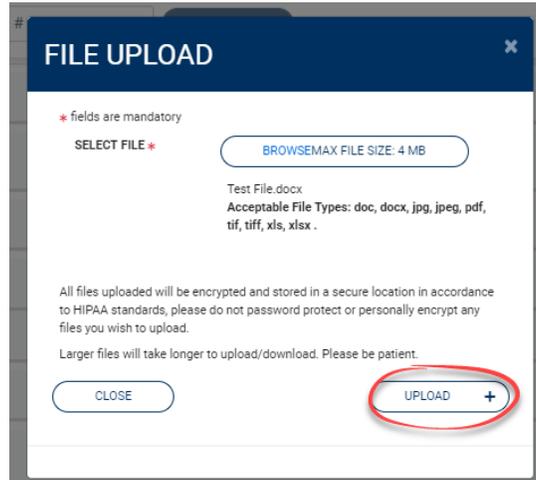
To find the designated files, click Browse.



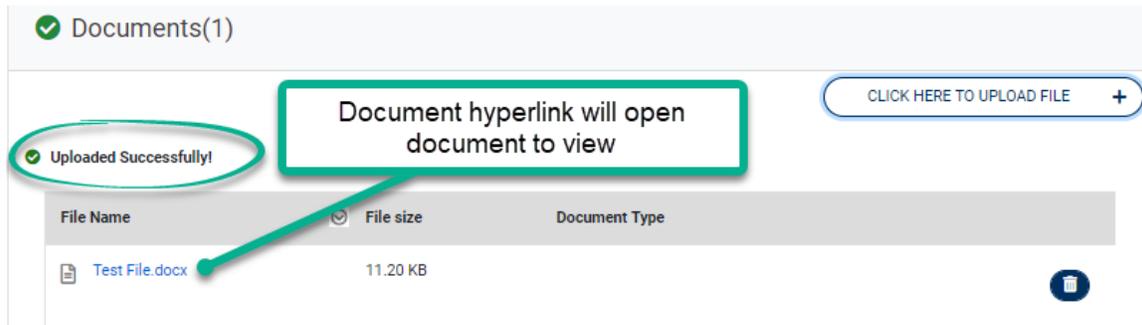
Select the necessary file and click Open.



To attach selected document to the case, click Upload.



Once uploaded, documentation can be viewed by clicking the hyperlink. To upload additional documentation, follow the [above steps](#).

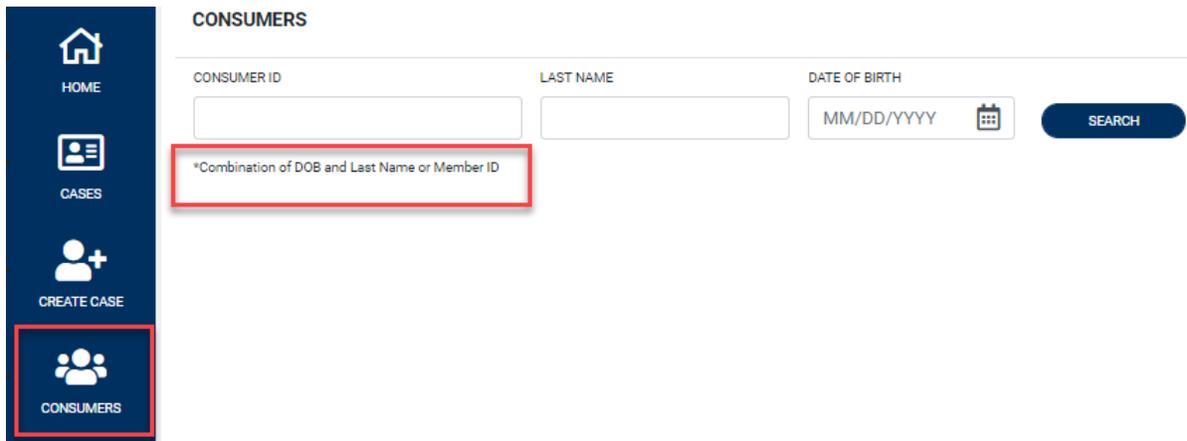


## Consumers

This section will identify the steps necessary to search for a consumer.

Click Consumer on the left navigation index. The Consumer default screen will appear providing options to search for a Consumer.

To search By Consumer, enter the required Member information. For results to render, user must enter Last Name and DOB or Member ID.



**CONSUMERS**

CONSUMER ID      LAST NAME      DATE OF BIRTH

**SEARCH**

\*Combination of DOB and Last Name or Member ID

HOME  
CASES  
CREATE CASE  
**CONSUMERS**

Search results will render below. To view the Consumer page, click on the Consumers Name which is a hyperlink.

**CONSUMERS**

CONSUMER ID      LAST NAME      DATE OF BIRTH

**SEARCH**

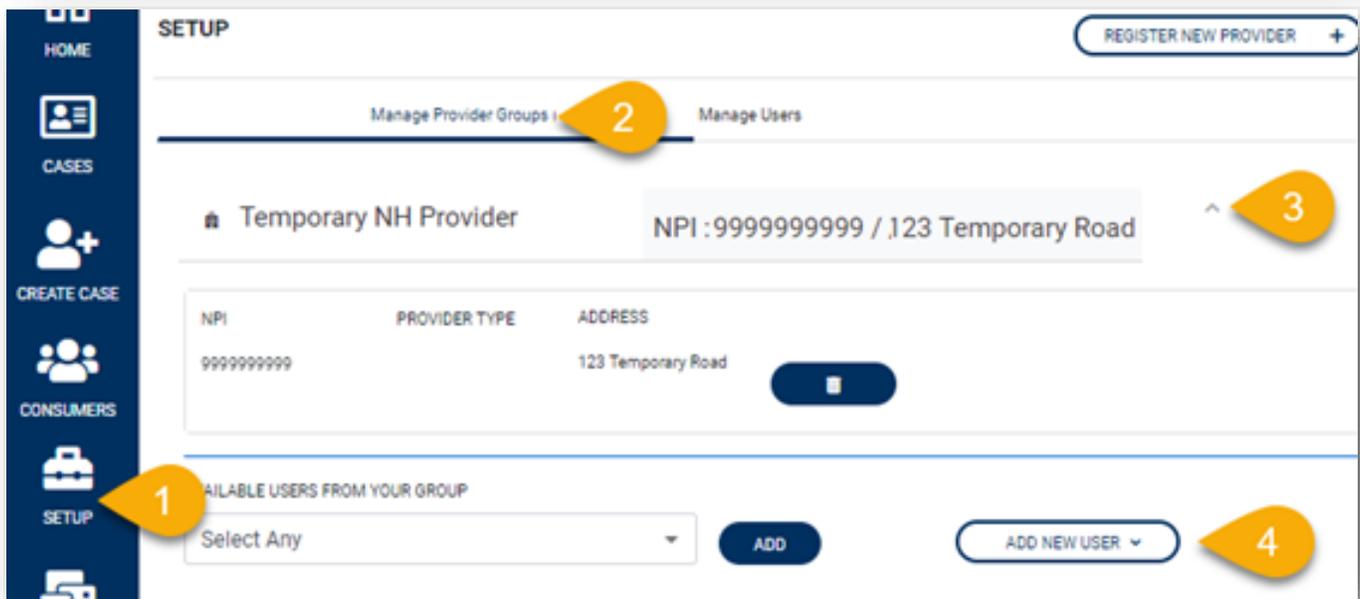
NAME	DATE OF BIRTH	ADDRESS	CONSUMER ID	CONTRACT
<a href="#">Raspberry</a>	01/15/1977			

## Set Up

This section will identify the steps for Provider Administrators to manage additional users within the portal. Only users set up as Provider Administrators will see this tab. For all other users, the tab will be hidden.

### Add New User

Click Setup in the left navigation index. You will see Manager Provider Groups. Always stay within this tab/section. Click the caret in the far right to expand the section.





Create username and password, complete the contact information, click create.

**USER NAME \***

**PASSWORD \***

**CONFIRM PASSWORD \***

Passwords must be a minimum of 8 letters and a maximum of 16. Passwords must contain at least: an uppercase letter, a lowercase letter, a number and special characters like @, %, +, \, /, ', !, #, \$, ^, ?, ;, :, (, ), {, }, [, ], ~, ~, \_

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**CONTACT INFORMATION**

<b>FIRST NAME *</b>	<b>LAST NAME *</b>	<b>EMAIL *</b>	<b>CONFIRM EMAIL *</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>ADDRESS LINE 1</b>	<b>ADDRESS LINE 2</b>	<b>CITY</b>	<b>STATE/PROVINCE</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	Select One ▾
<b>POSTAL CODE</b>	<b>PHONE</b>	<b>FAX *</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Note: Providers in receipt of Faxed Determination Letters: Official Communication of service authorization will be sent to the fax number entered above.

**CREATE >**

## Message Center

This section will identify the steps to view messages. To send messages, you must be inside a specified case. See the [Messages](#) section within the case for details on how to send a message.

New available messages are displayed in the left navigation index menu.



Indicates there are 2 unread and non-responded messages available.



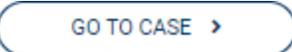
Indicates all messages are read and/or responded.

Available messages will display in the Message Center.

MESSAGE CENTER				
FROM	SUBJECT	TO	SENT ON	
Kepro	Status Complete	Provider Demo	9/14/2020 10:04:50 AM	
Kepro	Please Complete Questionnaire	Provider Demo	9/14/2020 9:59:43 AM	

Displaying records 1 to 2 of 2 records

Previous **1** Next Show 10 Entries

To open/view the message, click the caret in the right had corner of the selected message. To view the selected case, click . You will be directed to the specified case related to the message.

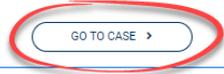
To reply to the message, directly in the Message Center, type text in the Message section, click



**MESSAGE CENTER**

FROM	SUBJECT	TO	SENT ON
Kepro	Status Complete	Provider Demo	9/14/2020 10:04:50 AM

Message:



**Reply**

SUBJECT \*

RE: Status Complete

MESSAGE \*

**To reply to the message, type text here and click Send.**

please do not send additional clinical information through these messages. Additional clinical information should be added to the clinical information section of the request.

CANCEL SEND >

## Reports

This section will identify the steps to access available reports, as applicable. Not all users will have access to reports and availability will vary based on contract and user role. Clicking the Reports icon in the left navigation index will open all available reports. The report name will be a hyperlink and open the desired report in a new tab within the internet browser.

**REPORTS**

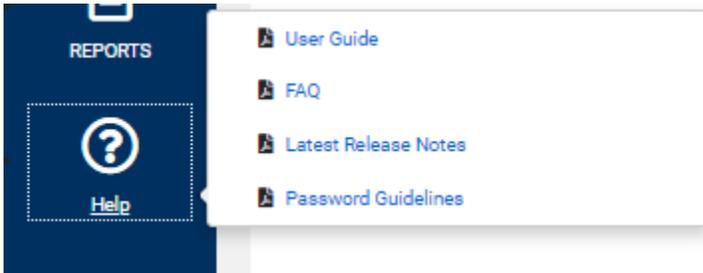
REPORT NAME	REPORT CATEGORY	REPORT DESCRIPTION
<a href="#">[blurred]</a>	[blurred]	[blurred]
<a href="#">[blurred]</a>	[blurred]	[blurred]

Displaying records 1 to 2 of 2 records

Previous **1** Next Show 10 Entries

## Help Guide

This section will identify the steps when additional help is needed or questions arise. Clicking the Help icon will open a menu of options including the User Guide, FAQ, Latest Release Notes, and Password Guidelines. These items are updated regularly and may change over time.



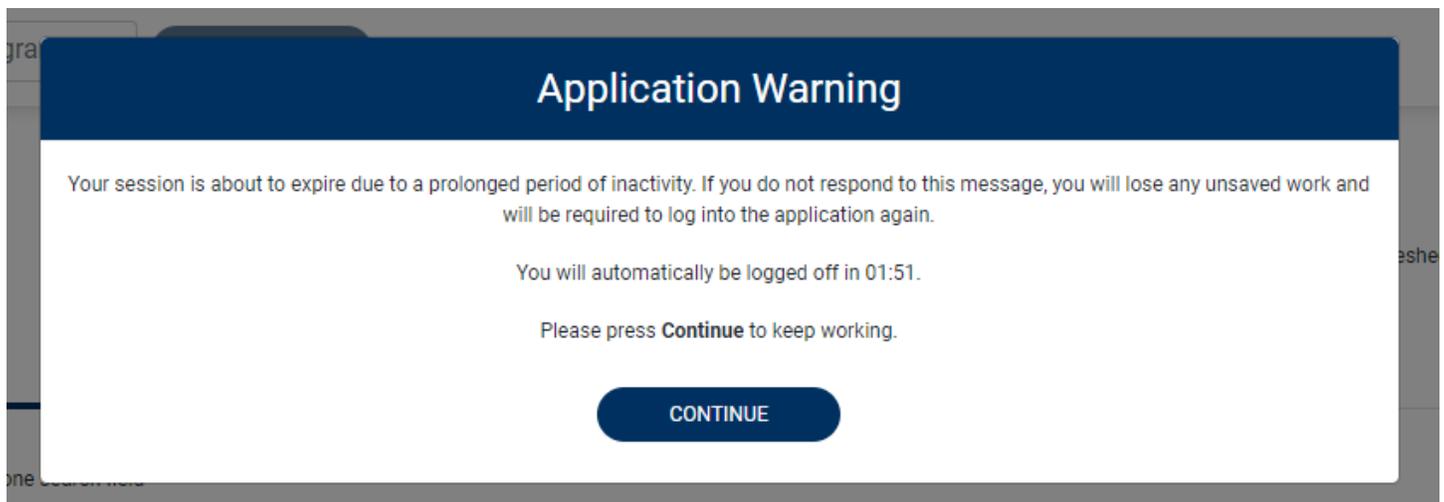
## Troubleshooting Tips and Tricks

This section will identify a few troubleshooting tips and tricks to help make navigation of the system easier. For access and login instructions, please see the **Atrezzo User Guide – Access & Login Manual**.

### Inactivity Warning

#### Important Note:

After a period of time of inactivity (15 minutes), a pop up will appear with a 2 minute countdown to logging out. As long as you are actively working within the system, you will not receive this pop up warning.



To continue working, select Continue.

If you do not select continue before the countdown reaches 0, you will be required to log in again to continue utilizing the system. The system AutoSaves as you navigate and complete fields. Completed work will not be lost; however, any unsaved work will be lost, if the system times out due to inactivity.

### Maximize Search Display Options

This section will identify the steps taken in order to view more than 10 items in a section or search result response. All search results will default to display only 10 items. The maximum number retrieved will be 300 results. To navigate, you can choose to view more or navigate multiple pages if preferred.

## View Pages

To view the next page, simply click the Next button on the bottom left. The current page number will be highlighted for easier navigation. Search results will only display a maximum of 300 results. For a lesser amount of search results, enter additional search criteria.

Tasks: 300 results, limit reached. Try narrowing search criteria.

CASE ID	CONSUMER NAME	DATE	DESCRIPTION	RISK STRATIFICATION	CASE STATUS	GROUP	ASSIGNED USER	OUTCOME	CONTRACT	PROGRAM	COUNTY	STATE	WORK
804622740111		06/05/2020	Call Member	2	Outreach	PSR		Open	Oregon Medicaid	Care Coordination		OR	WORK
20157000377		06/05/2020	Call Member	2	Outreach	PSR		Open	Oregon Medicaid	1915I CM State Hospital		OR	WORK
201430001					Working			Working	Oregon Medicaid	Care Coordination		OR	WORK
805117632					Open			Open	Oregon Medicaid	Care Coordination		OR	WORK
80507372811		06/09/2020	Call Member	2	Outreach	Default		Working	Oregon Medicaid	Care Coordination		OR	WORK
80221144111		06/09/2020	Care Coordination	0	Active Management	PSR		Open	Oregon Medicaid	Care Coordination			
804585173111		06/09/2020	Care Coordination	0	Outreach	PSR		Open	Oregon Medicaid	Care Coordination			
803118861111		06/09/2020	Care Coordination	0	Outreach	PSR		Open	Oregon Medicaid	Care Coordination			
80282617		06/09/2020	Care Coordination	0	Active Management	PSR		Open	Oregon Medicaid	Care Coordination		OR	WORK
.02841061111		06/09/2020	Care Coordination	0	Active Management	PSR		Open	Oregon Medicaid	Care Coordination		OR	WORK

Displaying records 21 to 30 of 300 records

Previous 1 2 3 4 5 ... 30 Next Show 10 Entries

Red text at the top of the search results will indicate that more than 300 records were found, but only 300 can be displayed.

Click Next to see the next page of results

Here you will see how many items are displayed and the total number of records

Click Previous to see the prior page of results

Current page results are highlighted

## View More Entries

To view more entries on the results, click the arrow next to the 10 displayed. You can then choose how many results you prefer to view: 10, 25, 50, 75, or 100. Click the preferred number and the list will automatically refresh.

80263835911		06/01/2020	Activity Decisions	3	Outreach	CM Review		Working	Oregon Medicaid	Care Coordination		OR	WORK
80257967411		06/03/2020	Call Member	2	Closed	PSR		Working	Oregon Medicaid	Care Coordination		OR	WORK
201330052449		06/03/2020	Care plan - initiate	1	Active Management	CM Review		Working	Oregon Medicaid	1915I CM LLC- Lower Level of Care		OR	WORK
80433297611		06/04/2020	DME follow-up	3	Outreach	PSR		Working	Oregon Medicaid	Care Coordination		OR	WORK
80497873911		06/04/2020	Call Member	2	Outreach	PSR		Open	Oregon Medicaid	Care Coordination		OR	WORK

Displaying records 1 to 10 of 300 records

30 Next Show 10 Entries

10 25 50 75 100

Here you will see how many items are displayed and the total number of records

Click the arrow in the box next to the number for the drop down - choose the preferred number of records to be displayed per page

Once a selection is made from the drop down, the page will automatically refresh. You will see that additional records are being displayed.

80407563211	06/09/2020	Care Coordination	0	Outreach	PSR	Open	Oregon Medicaid	Care Coordination	OR	WORK
80264589411	06/09/2020	Care Coordination	1	Active Management	PSR	Open	Oregon Medicaid	Care Coordination	OR	WORK
80483257511	06/09/2020	Care Coordination	0	Outreach	PSR	Open				WORK
80378392211	06/09/2020	Care Coordination	0	Outreach	PSR	Open				WORK
80403510011	06/09/2020	Care Coordination	0	Outreach	PSR	Open				WORK
80412041011	06/09/2020	Care Coordination	0	Outreach	PSR	Open				WORK
80346321811	06/09/2020	Care Coordination	0	Outreach	PSR	Open	Oregon Medicaid	Care Coordination		WORK

Displaying records 1 to 100 of 300 records

Previous 1 2 3 Next Show 100 Entries

Here you will see how many items are displayed and the total number of records.

The drop down will indicate the number of records requested per page.  
If more than 1 page of results, click Next to view more.

## Hyperlinks

There are hyperlinks throughout the system which will navigate you to another page or location. Any blue bold text is a hyperlink.

Examples of hyperlinks for reference are detailed below. The green arrow in each image will depict a hyperlink. These are just a few examples to demonstrate the various type and location of hyperlinks within the system.

<a href="#">ALL CASES</a>	<a href="#">EPISODE OF CARE</a>			
CASE/PROGRAM ID	SUBMITTED DATE/ TIME	CASE TYPE	CONTRACT	
<a href="#">201680005</a>	6/16/2020 9:54:21 AM	NF LOC	NH PASRR and NH LOC	

**PROVIDERS**

Please select Contract, Provider Type and Last Name or Tax ID to search

RESET

CONTRACT \*  PROVIDER TYPE \*  FIRST NAME  LAST NAME  NPI  COUNTRY

STATE/PROVINCE  COUNTY  NETWORK  CITY  POSTAL CODE  TAX ID

SEARCH

FIRST NAME	LAST NAME	TYPE	SPECIALITY	NPI	MEDICAID ID	ADDRESS	CITY	STATE	COUNTRY	COUNTY
<a href="#">BEVERLEY</a>	JAMES	Allopathic & Osteopathic Physicians	Psychiatry	1043379522		9101 W 73RD ST APT 206	OVERLAND PARK	KS	United States	
<a href="#">CLEVE</a>	JAMES	Allopathic & Osteopathic Physicians		1033346366		4102 WOODLAWN AVE	PASADENA	TX	United States	
<a href="#">CYNTHIA</a>	JAMES	Other Service Providers		1033250782		600 N WOLFE ST	BALTIMORE	MD	United States	
<a href="#">DAFFNEY</a>	JAMES	Restorative Service Providers		1013174572		200 SOMERSET ST	NEW BRUNSWICK	NJ	United States	
<a href="#">DANNY</a>	JAMES	Addiction (Substance Use Disorder)		1013188283		1257 PAIUTE CIR	LAS VEGAS	NV	United States	
<a href="#">DAVID</a>	JAMES			1033398771		1600 EAST BROADWAY	COLUMBIA	MO	United States	
<a href="#">DESTINY</a>	JAMES	Behavioral Health & Social Service Providers		1023291267		1911 WILLIAMS DR STE C	OXNARD	CA	United States	
<a href="#">DNAYDAVINA</a>	JAMES	Behavioral Health & Social Service Providers		1043395641		744 SE 25TH STREET	OKLAHOMA CITY	OK	United States	
<a href="#">DONALD</a>	JAMES	Allopathic & Osteopathic Physicians		1013100866		1050 W 10TH ST	ROLLA	MO	United States	
<a href="#">DOUGLAS</a>	JAMESON	Behavioral Health & Social Service Providers	Clinical	1023031515		3167 COLLEGE AVE	BERKELEY	CA	United States	

When searching providers, the first name is the hyperlink

**CASES**

\* fields are mandatory

CONTRACT \*  CASE TYPE  CASE STATUS \*  REQUEST TYPE

REASON  CREATED BY  DATE \*   TO

SEARCH

CASE ID	CONSUMER NAME	CASE TYPE	ASSESSMENT TYPE	REQUEST TYPE	CASE STATUS	REASON	CREATED DATE	CREATED BY
<a href="#">201500004</a>		NF LOC	NF-LOC	Initial	Submitted	OUTCOME:	5/29/2020 4:47:36 PM	wbolton
DIAGNOSIS				NH PASRR and NH LOC			LETTERS: 0 MESSAGES: 0	
<a href="#">201540001</a>		NF LOC	NF-LOC	Initial	Submitted	OUTCOME:	6/2/2020 1:18:19 PM	wbolton
DIAGNOSIS				NH PASRR and NH LOC			LETTERS: 0 MESSAGES: 0	

When searching Case; the Case ID is the hyperlink

**ATREZZO - CASE DASHBOARD**

CONSUMER NAME	GENDER	DATE OF BIRTH	LOCATION	COUNTY	MEMBER ID
<a href="#">Mark</a>	Male		1151 Summer St Briston NH		

CASE ID	CASE CONTRACT	OUTCOME	OPEN TASKS	WORKING TASKS
	NH PASRR and NH LOC	Completed	0	0

Case Overview	Review	Call entries(0)	Letters/Reports(0)	Notes(0)	Messages(0)	Task Center(1)
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When in a case, the name is a hyperlink. This link will take you to the consumer information page