



TPL Portal User Manual for Providers and Partners

**Version 3.1 – Carrier Code Management, TPL Search,
and Third-Party Referral (TPR) Components**

1/6/2025

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1. Document History

Date	Version	Editor Name	Description
06/15/24	1.0	GW/HMS	Initial Draft of Carrier Code Management Component
06/25/24	1.1	GW/HMS	Final Draft of Carrier Code Management Component
07/23/24	1.2	GW/HMS	Updated TPL Portal Login Screen and TPL Portal Home Screen Screenshots
08/20/24	2.0	GW/HMS	Added TPL Search Component
09/10/24	2.1	GW/HMS	Updated TPL Search Component
09/16/24	2.2	GW/HMS	Updated TPL Search screenshots
11/06/24	2.3	GW/HMS	Updated TPL Search Component section and TPL Portal Home Page screenshots
11/25/24	3.0	GW/HMS	Added Third-Party Referral (TPR) Component
01/06/25	3.1	GW/HMS	Updated TPR Home Page section

2. Introduction

This Third-Party Liability (TPL) Portal User Manual for Providers and Partners document will be shared with MCEs (Managed Care Entities {Partners}) and Providers who require the ability to access the Louisiana Department of Health (LDH) TPL Portal.

2.1 Overview

The **Carrier Code Management** component in the TPL Portal will allow MCEs (Partners) and Providers the ability to access the current Louisiana Department of Health (LDH) active Carrier Code listing as well as submit a request to have a new Carrier added to the listing.

The **TPL Search** component will allow MCEs (Partners) and Providers the ability to search for TPL associated with a Louisiana Department of Health (LDH) Medicaid Recipient.

The **Third-Party Referral (TPR)** component will allow MCEs (Partners) and Providers the ability submit a New Lead request, submit a Reverification request, and track their submitted requests.

2.2 Requesting Credentials

The TPL Portal has been integrated with the lamedicaid.com Provider Portal so, the system will allow users to utilize their existing LA Medicaid Provider Portal credentials to log into the TPL Portal. Therefore, users who already have a Provider ID, NPI, Log In ID, and Password for accessing the lamedicaid.com Provider Portal can skip this Requesting Credentials section and proceed to the “Logging into the TPL Portal” section.

Link to the lamedicaid.com Provider Portal: <https://www.lamedicaid.com/account/login.aspx>.

Users who do not already have an active account to access to the lamedicaid.com Provider Portal can request credentials via lamedicaid.com Provider Enrollment:

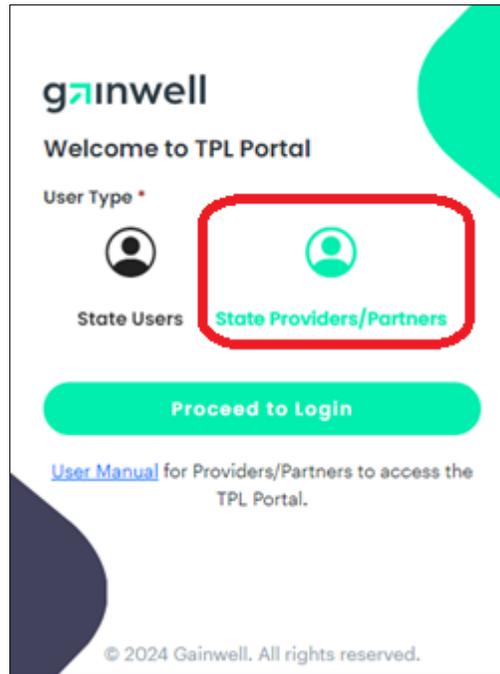
https://www.lamedicaid.com/provweb1/Provider_Enrollment/newenrollments.htm.

If you experience any issue with your credentials or logging into the TPL Portal, please contact the Gainwell Helpdesk by calling 844-715-4357.

2.3 Logging into the TPL Portal

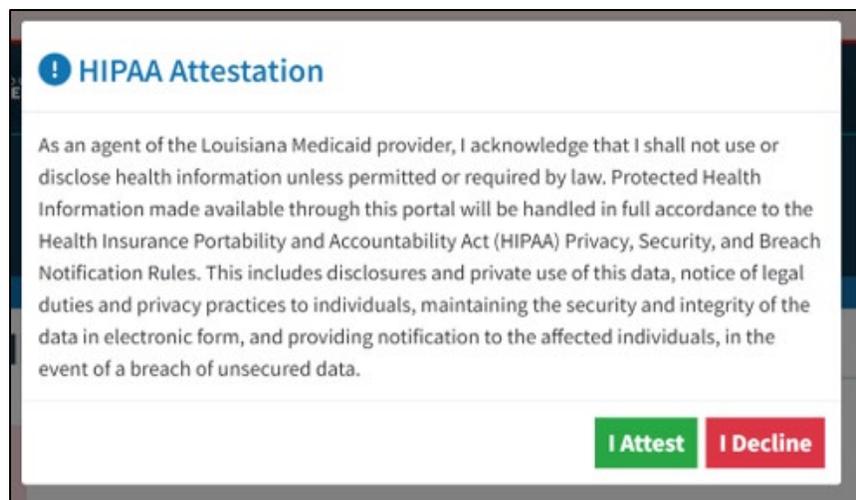
Step 1: State Personnel, Providers, and Partners can access the TPL Portal at the following URL:
<https://tplportal.hms.com/?ClientCd=LA>.

Step 2: By clicking the “State Providers/Partners” icon, the user is given the option to “Proceed to Login” via the button or review the User Manual via the link provided.



Step 3: Click the “Proceed to Login” button which will direct the user to the Provider Portal at lamedicaid.com.

Step 4: After reviewing the HIPAA Attestation, click the “I Attest” button. You will then be redirected to lamedicaid.com Provider Portal Provider Login.



Step 5: Enter the Provider ID, NPI, Captcha Image values, and click on the “Next” button.

The screenshot shows the Louisiana Medicaid Provider Login page. At the top, there is a header with the Louisiana Department of Health logo and a "BACK TO LDH" button. Below the header is a large blue banner with "LOUISIANA MEDICAID" in white text. Underneath the banner, a breadcrumb trail reads "You are here : Louisiana Medicaid > Provider Login". The main content area features the "gainwell" logo and the title "Provider Login" with a "PRINT" button. A "Help" link is visible. On the left, there is a "Notice" box with a red icon and text: "This is a class action notice for A.A. et al. v. Abraham et al lawsuit". To the right, a yellow box contains instructions: "Please use your 7-Digit Medicaid Provider ID and your 10-digit National Provider Identifier (NPI). If you are an Atypical provider then a NPI is not required. Reset account information or change administrator, click here?". Below this are input fields for "Provider ID" and "NPI". A security instruction states: "For security purposes, please enter the characters from the CAPTCHA image". Below this is a CAPTCHA image showing the number "97918" and a "NEXT" button. A "NOTICE TO USERS" section follows, containing a privacy policy statement: "This is Louisiana's Medicaid information and is the property of Gainwell Technologies and Louisiana Department of Health. It is for authorized use only. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy. Any or all uses of this website and all files on this system may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to authorized site, Louisiana Department of Health, and law enforcement personnel, as well as authorized officials of other agencies, both domestic and foreign. By using this system, the user consents to such interception, monitoring, recording, copying, auditing, inspection, and disclosure at the discretion of authorized site or Louisiana Department of Health. Unauthorized or improper use of this website may result in administrative disciplinary action and civil and criminal penalties. By continuing to access this website you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning." At the bottom of the notice is a "NEXT" button.

Step 6: Enter your Login ID and Password then click on the “Next” button to be redirected to the TPL Portal dashboard as shown in the below screenshot.

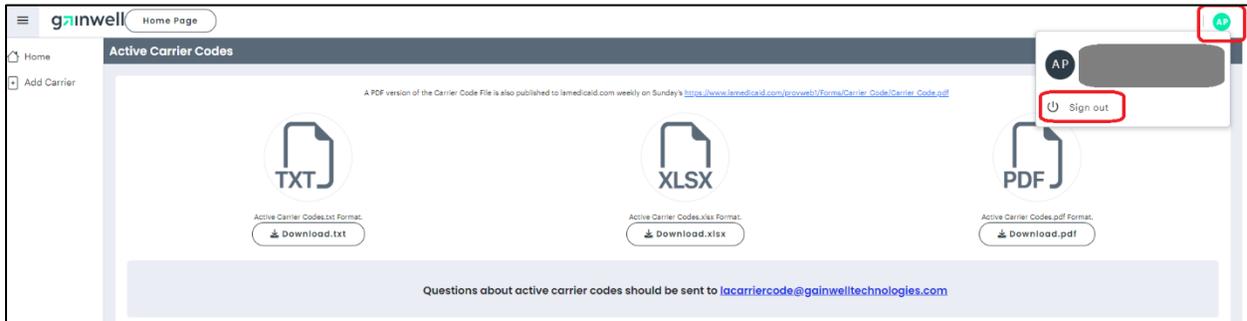
The screenshot shows the Louisiana Medicaid User Login page. At the top, there is a header with the Louisiana Department of Health logo and a "BACK TO LDH" button. Below the header is a large blue banner with "LOUISIANA MEDICAID" in white text. Underneath the banner, a breadcrumb trail reads "You are here : Louisiana Medicaid > Provider Login". The main content area features the "gainwell" logo and the title "User Login" with a "PRINT" button. A "Help" link is visible. Below the title, the instruction "Please enter your Login ID and Password." is displayed. There are input fields for "Login ID" and "Password". Below these fields is a "Need help?" section with three links: "Forgot Your Login ID?", "Forgot Your Password?", and "Forgot Login ID and Password?". At the bottom of the page are "PREVIOUS" and "NEXT" buttons.

TPL Portal Home Page

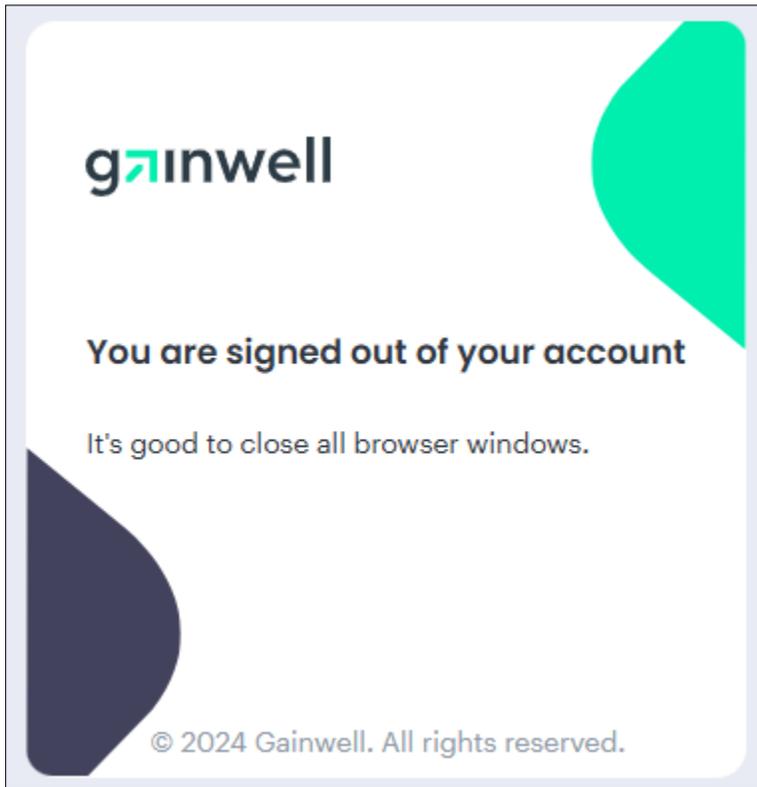


2.4 Logging out of the TPL Portal

While logged into the portal the option to log out is available to users by clicking on the users initials found on the top right corner of each page. Select "Sign Out" to log out.



The user will then see a message stating that they are now signed out and should close their browser.



3. Carrier Code Management Component

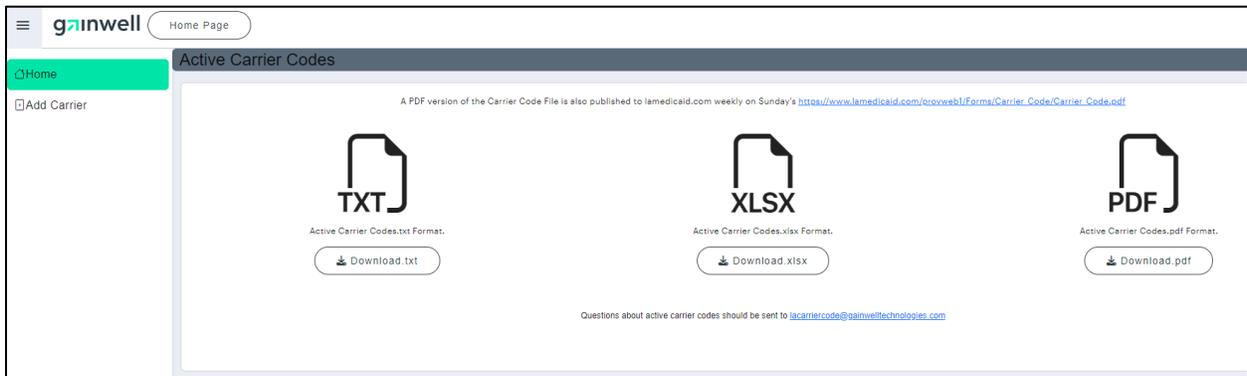
The **Carrier Code Management** component in the TPL Portal allows MCEs (Partners) and Providers the ability to access the current LDH active Carrier Code listing as well as submit a request to have a new Carrier added to the listing.



3.1 Carrier Code Management Home Page

Clicking on “Carrier Code Management” will redirect the user to the Carrier Code Management Home Page. Here the user can click on the link to view the PDF version of the Carrier Code File at [lamedicaid.com](https://www.lamedicaid.com/coverage/Forms/Carrier_Code/Carrier_Code.pdf) or they can download the same file in various formats.

All requests for modifications to an existing Carrier should be sent via email to lacarriercode@gainwelltechnologies.com.

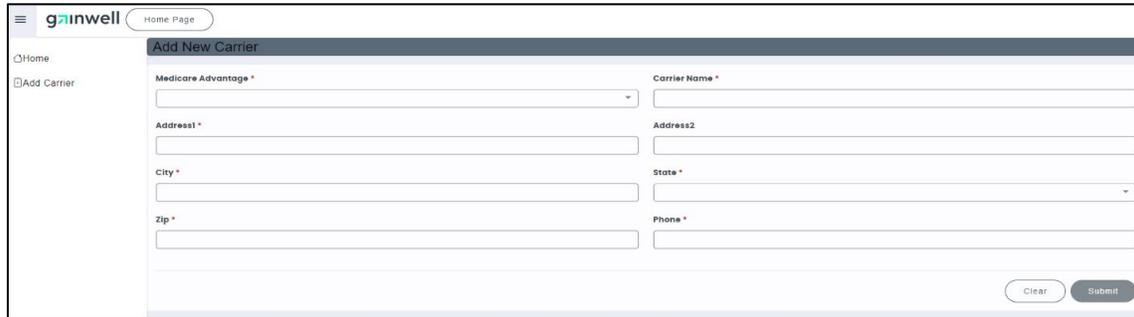


Menu Option: If the user would like to request to Add a Carrier, they can click “Add Carrier” from the menu on the left side of the screen.

3.2 Add Carrier

Note: All email communication with individuals who request a new Carrier be added will be done via the Gainwell LA Carrier Code Management group email address: lacarriercode@gainwelltechnologies.com

When requesting the addition of a new Carrier Code, it is critical to first ensure the Carrier is not already in the Carrier Code File. Search for the Carrier by Name and/or Address. The Gainwell LA Carrier Code Team will also verify that request(s) will not create a duplicate record. If they find a possible duplicate, the request to add the new carrier will be denied.

The image shows a screenshot of a web application interface for adding a new carrier. The page title is "Add New Carrier". On the left, there is a navigation menu with "Home" and "Add Carrier" options. The main form area contains several input fields: "Medicare Advantage" (a dropdown menu), "Carrier Name" (a text input), "Address1" (a text input), "Address2" (a text input), "City" (a text input), "State" (a dropdown menu), "Zip" (a text input), and "Phone" (a text input). At the bottom right of the form, there are two buttons: "Clear" and "Submit".

Field-level detail on the Add Carrier page

Medicare Advantage: This required field drop down options are “Yes” or “No.”

Carrier Name: This required field is free form, max 50 characters, and allows alphanumeric characters.

Address1: This required field is free form, max 40 characters, and allows alphanumeric characters.

Address2: This optional field is free form, max 40 characters, and allows alphanumeric characters.

City: This required field is free form, max 30 characters, only alphabetic characters are allowed.

State: This required field drop down options will include all valid State Abbreviations.

Zip: This field requires 9 numeric characters. If the user is unaware of the +4 numbers, 0000 is acceptable.

Phone: This field requires 10 numeric characters.

Clear: This button allows the user to discard any changes.

Submit: This button completes the request. A pop up informs the user that the request has been submitted, and to allow five (5) business days for an update.

Once a request is submitted, an email containing the details of the request is sent to the Gainwell LA Carrier Code Team to complete required research to determine if the Carrier can be added.

If the new Carrier is added, the user will receive an email from lacarriercode@gainwelltechnologies.com with the new Carrier Code. Example below.

To: user@gainwelltechnologies.com
Subject: New Carrier Add Request has been approved

Your Request has been approved, Carrier Code is H50860

NAME	ADDRESS1	ADDRESS2	CITY	STATE	ZIP	PHONE	SUBMITTED DATE	SUBMITTED BY
SUNFLOWER	123 BLOOM RD		BAKER	LA	70726-0000	225-987-4862	Wed May 01 15:21:16 UTC 2024	A@LA.GOV

If the new Carrier is not added, the user will receive an email from lacarriercode@gainwelltechnologies.com explaining the reason for denial, including the code if the Carrier already exists. Example below.

To: user@gainwelltechnologies.com
Subject: New Carrier Add Request has been denied

Your Request has been denied, Carrier Code H50860 already exists for this Carrier.

NAME	ADDRESS1	ADDRESS2	CITY	STATE	ZIP	PHONE	SUBMITTED DATE	SUBMITTED BY
SUNFLOWER	123 BLOOM RD		BAKER	LA	70726-0000	225-987-4862	Wed May 01 15:21:16 UTC 2024	A@LA.GOV

Any questions regarding your Carrier Code Requests should be sent to the following email address: lacarriercode@gainwelltechnologies.com.

4. TPL Search Component

The **TPL Search** component allows MCEs (Partners) and Providers the ability to search for TPL associated with an LDH Medicaid Recipient. This component can be found on the home page of the TPL Portal once a user is logged in.



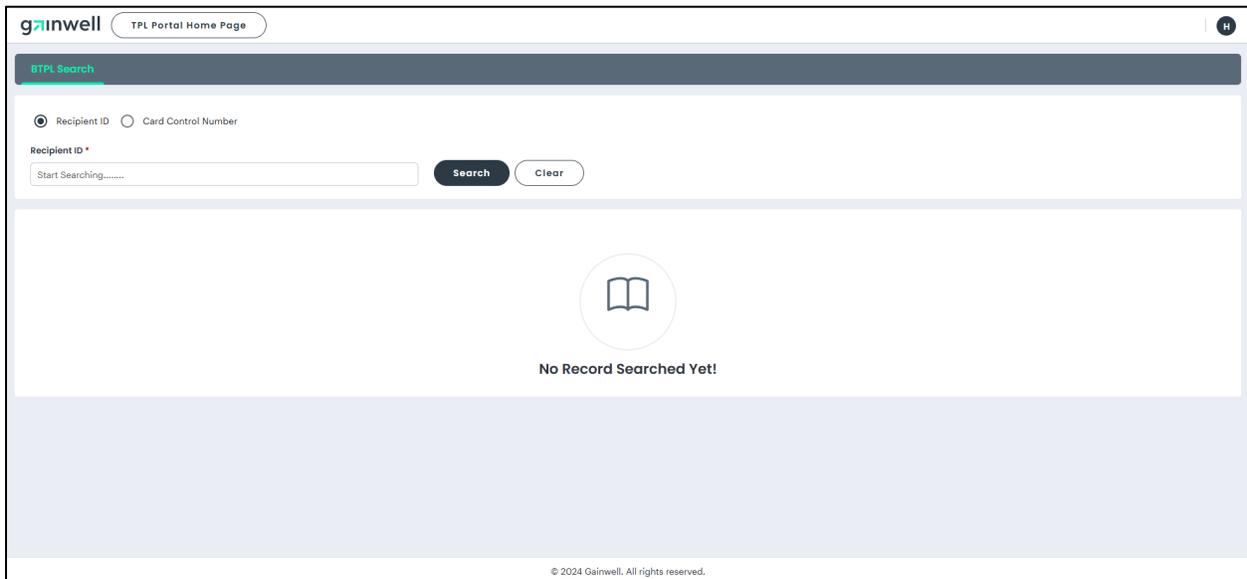
4.1 TPL Search Page

After selecting the “TPL Search” button in the TPL Portal, all users will be taken to the TPL Search Page. This page allows users to search for Beneficiary Third-Party Liability (BTPL) records. Users can then view TPL Policy Records that were returned.

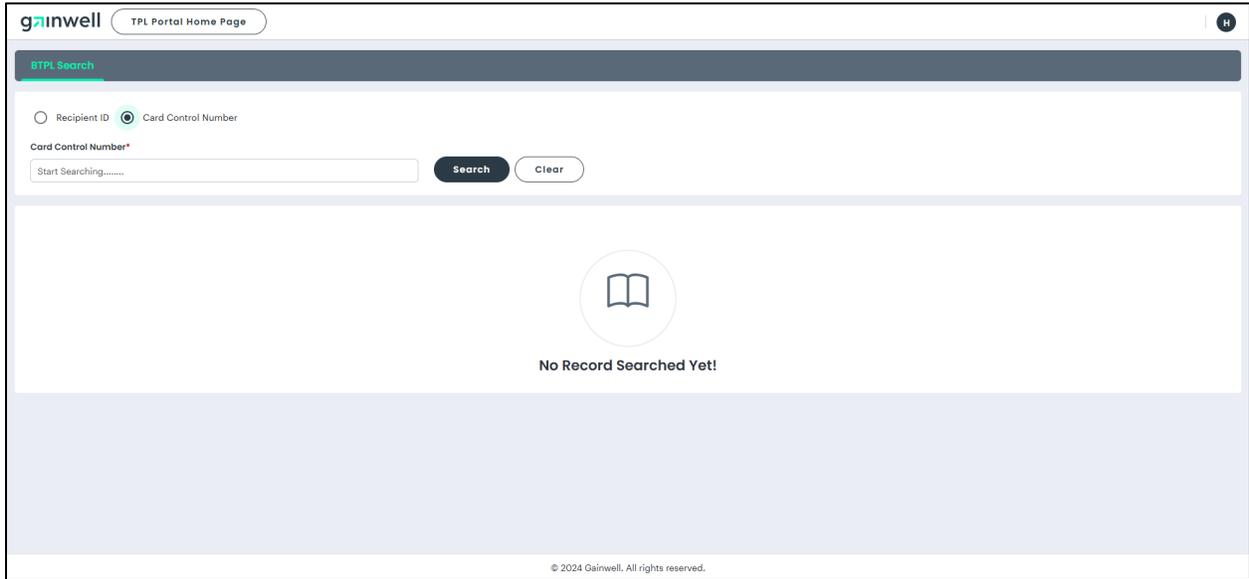
4.2 BTPL Search

Searching the BTPL Database can be accomplished by entering a Recipient ID or Card Control Number (Medicaid Identification Card Control Number). The results will return all TPL Policies for that Member where Medicaid and TPL Policy is active, or Termination/End date is within last 3 years.

Search by Recipient ID: This field requires 13 numeric digits and must be a valid LDH Medicaid ID.

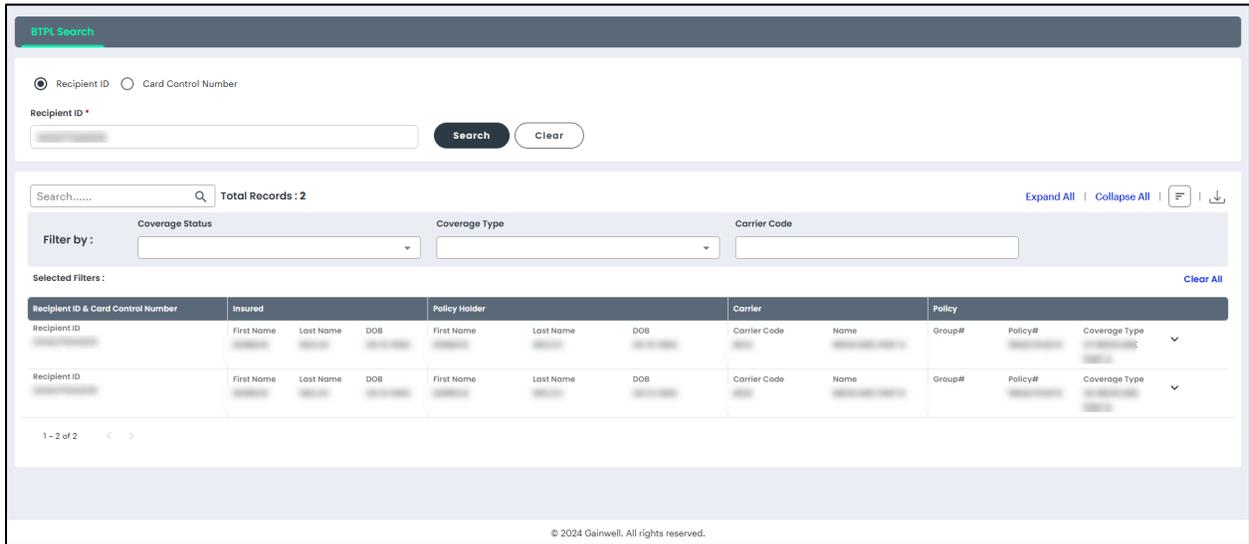


Search by Card Control Number: This field requires 16 numeric digits and must start with 777.

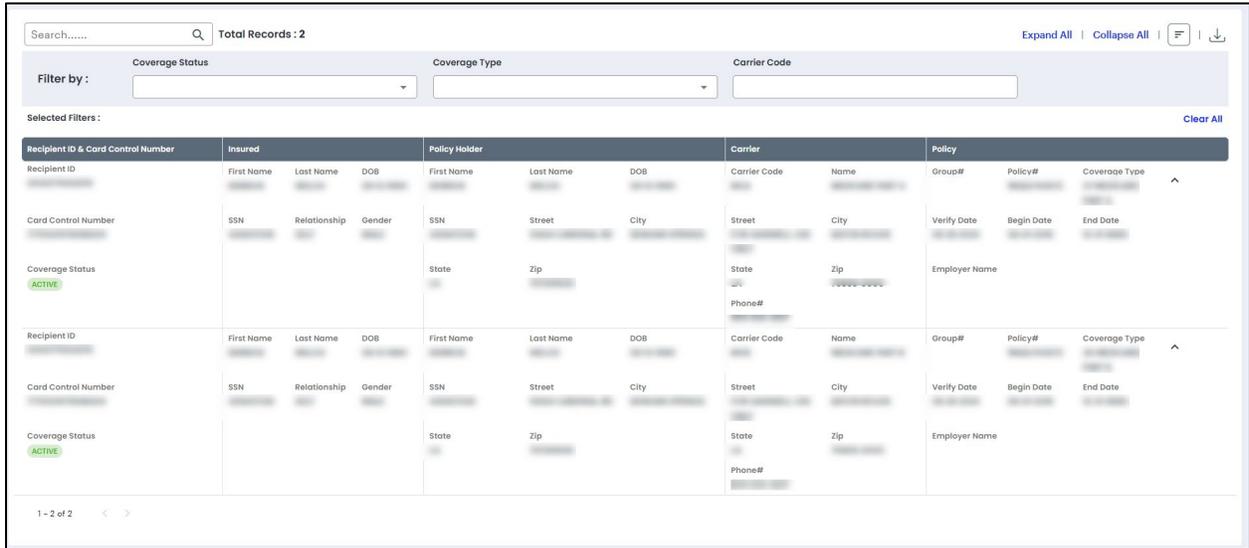


After a valid Recipient ID or Card Control Number has been entered, click the “Search” button to view the related Member’s TPL Policies. If desired, clicking the “Clear” button will delete the any values entered in the Recipient ID or Card Control Number input fields.

Records displayed on the BTPL Search Page are ordered by: Carrier Code, Group Number, Policy Number, Start Date, and End Date.



Expand All: Clicking on “Expand All” will allow users to see all policy details for the results returned.



Collapse All: Clicking on “Collapse All” will hide most policy details allowing the user to view policy summaries.

Filter By: The user can filter the results based on Coverage Status, Coverage Type and Carrier Code.

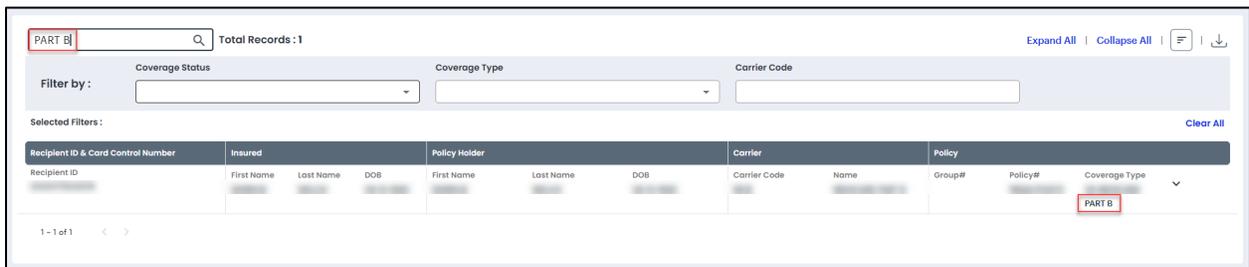


Coverage Status: Options available are in a dropdown list and include All, Active, and Inactive.

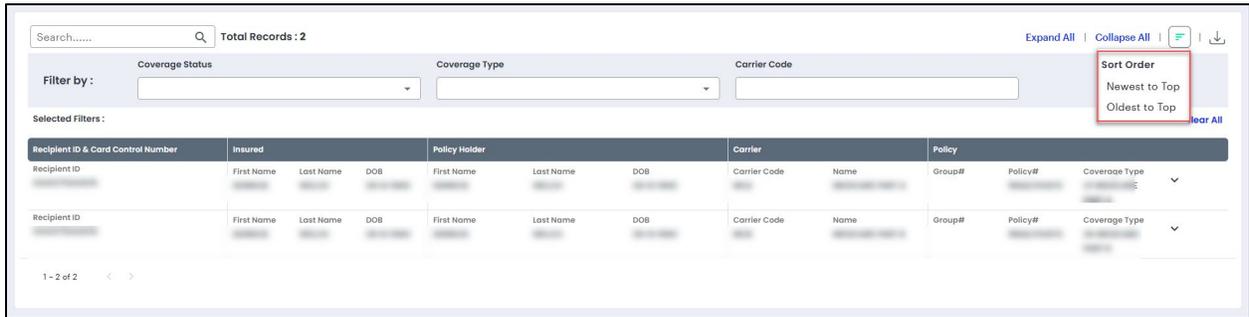
Coverage Type: Options available are in a dropdown list and the list of valid values are available @ [Medicaid | Department of Health | State of Louisiana](#) .

Carrier Code: The user can enter a valid LDH Carrier Code to narrow down search results to a specific ID.

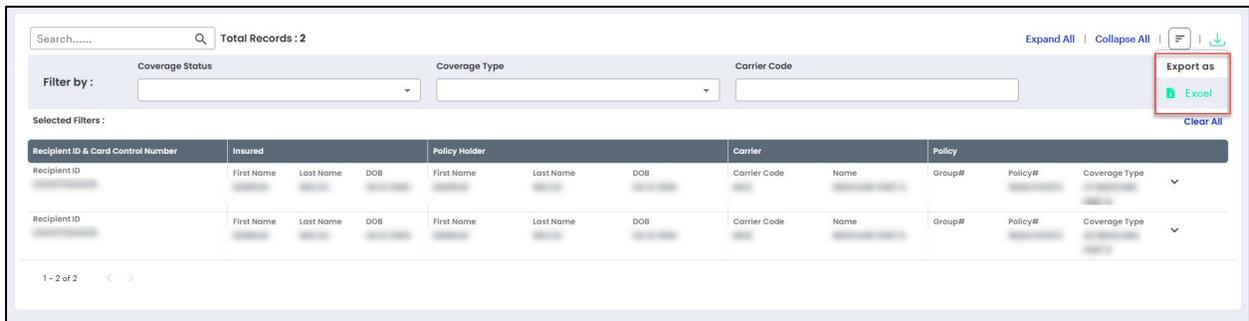
Further filtering tools are available by entering any values from the results grid into the Search input field filter.



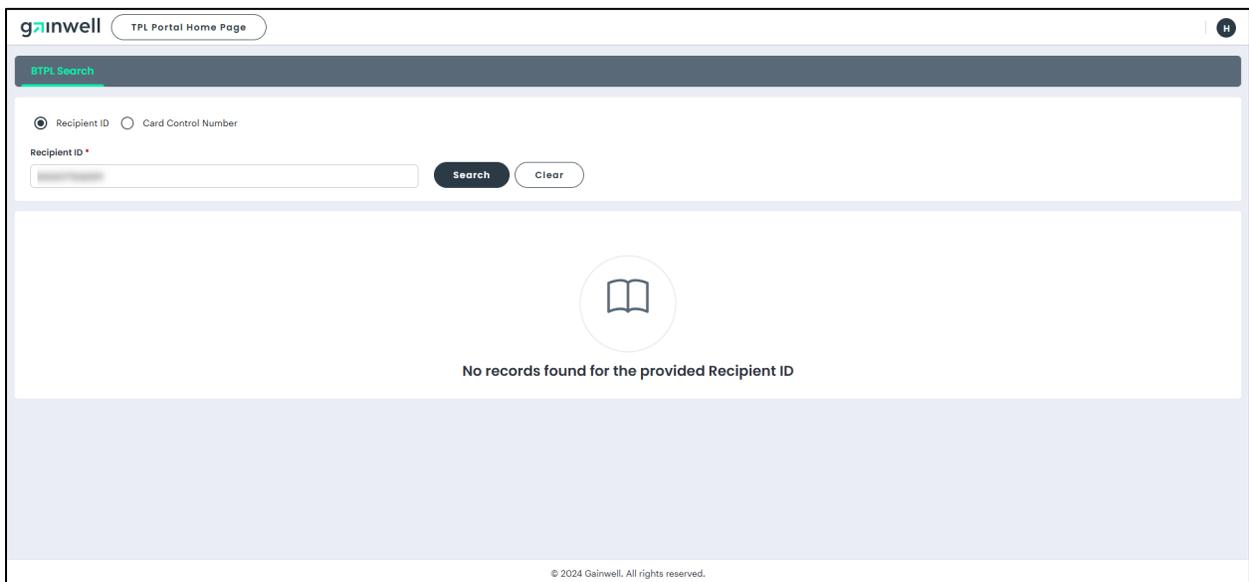
Sort Order: Clicking on the “Sort” button, located next to “Collapse All” link allows the user to sort ascending or descending based on the policy begin date.



Download: Clicking on the “Download” button allows the user to download the current results policy details in Microsoft Excel format.

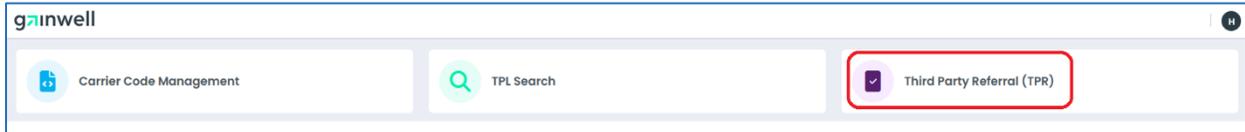


If in a search, no TPL records were found, page will display the message “No records found for the provided Recipient ID.”



5. Third-Party Referral (TPR)

The **Third-Party Referral (TPR)** component provides MCEs (Partners) and Providers with the ability to submit a New Lead request for a TPL Policy, Reverification request for an existing TPL Policy, and track their submitted requests for a New Lead and/or Reverifications.



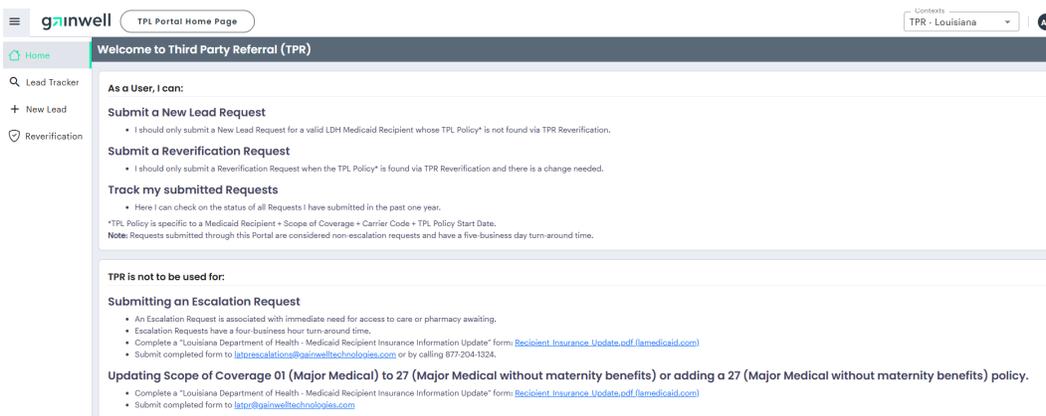
5.1 Home Screen

After selecting the “Third-Party Referral (TPR)” in the TPL Portal, all users will be redirected to the Third-Party Referral (TPR) Home Page.

Menu Option: If the user would like to Submit a New Lead or Reverification Requests or Track submitted lead requests, they can click on the below listed options from the menu on the left side of the Home Page.

- **New Lead**
 - Users should only submit a New Lead Request for a valid LDH Medicaid Recipient whose TPL Policy* is not found via TPR Reverification
 - Please be advised that Medicare Part A and B should not be submitted through the TPR New Lead Request UI Pages.
- **Reverification**
 - Users should only submit a Reverification Request when the TPL Policy* is found via TPR Reverification and there is a change needed
- **Lead Tracker**
 - Users can check on the status of all New Lead and Reverification requests they submitted with-in a year

*Note: TPL Policy is specific to a unique combination of Medicaid Recipient ID, Scope of Coverage, Carrier Code and TPL Policy Start Date. Requests submitted through this Portal are considered non-escalation requests and will have a five-business day turn-around time.



Please be advised that the TPR component is not to be used for submitting an Escalation Request. An Escalation Request is associated with immediate need for access to care or pharmacy awaiting. Escalations Requests have a four-business hour turn-around time. TPR also is not to be used for updating scope of coverage 01 (Major Medical) to 27 (Major Medical without maternity benefits) or adding a 27 (Major Medical without maternity benefits) policy.

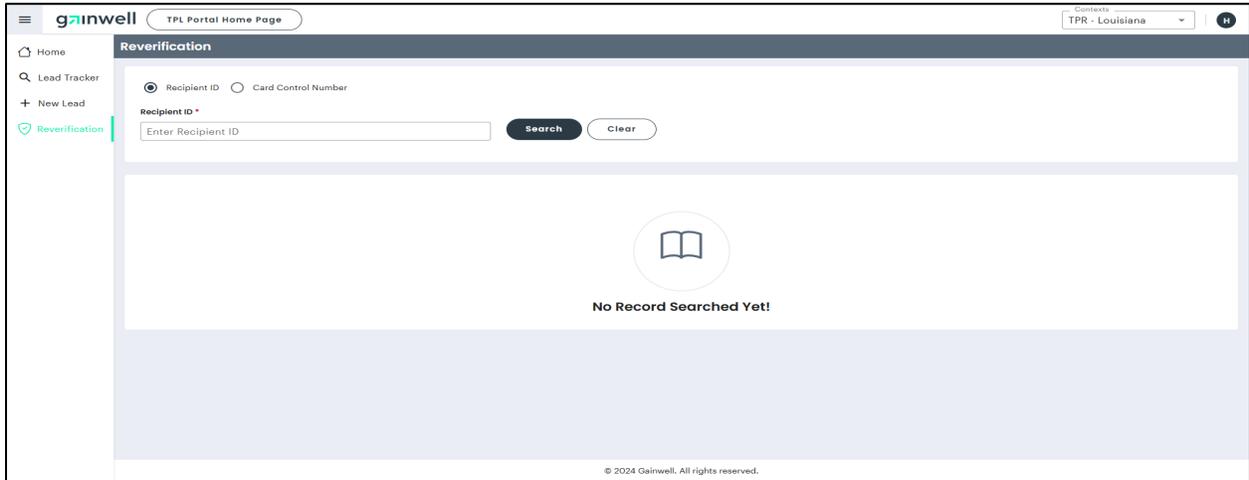
- For either of these items, as needed, complete a “Louisiana Department of Health – Medicaid Recipient Insurance Information Update” form found at https://www.lamedicaid.com/provweb1/ProviderTraining/Packets/2008ProviderTrainingMaterials/Recipient_Insurance_Update.pdf.
- For escalations, submit the completed form to: latprescalations@gainwelltechnologies.com or by calling 877-204-1324.
- For updating the scope of coverage 01 (Major Medical) to 27 (Major Medical without maternity benefits) or adding a 27 (Major Medical without maternity benefits) policy, submit completed form to latpr@gainwelltechnologies.com

5.2 Reverification

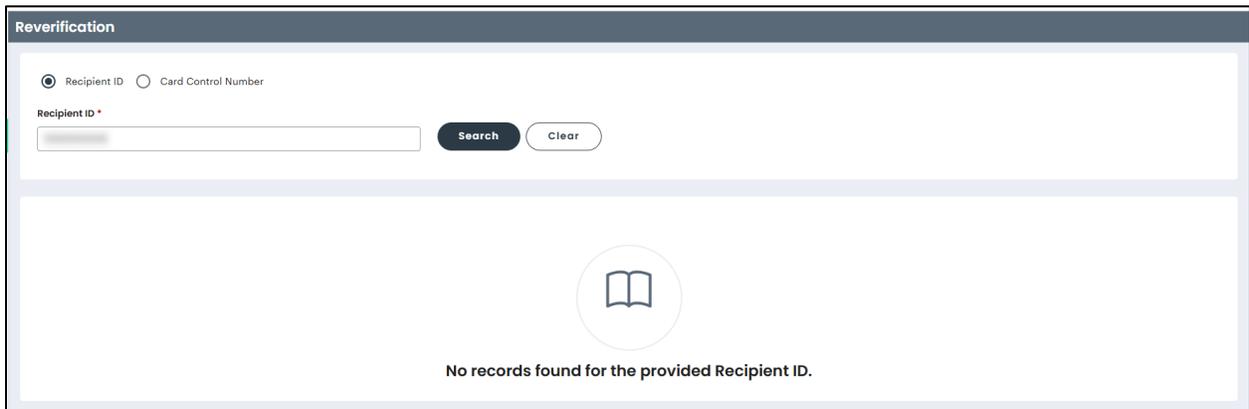
Clicking on the Reverification Menu Option will redirect the users to the Reverification Panel. Users should only submit a Reverification Request thru this panel when the TPL Policy is found and the TPL Policy needs to be updated. Searching for an existing TPL Policy can be accomplished by entering a Recipient ID or Card Control Number (Medicaid Identification Card Control Number). The results will return all TPL Policies (other than Medicare Part A & B records) for that Member where Medicaid Eligibility and TPL Policy is active, or Policy Termination/Medicaid Member Eligibility End date is within last 3 years.

The screenshot displays the Gainwell TPL Portal Home Page. The page title is "Reverification". At the top, there is a navigation bar with the Gainwell logo, "TPL Portal Home Page", and a dropdown menu for "Contexts" set to "TPR - Louisiana". A sidebar on the left contains navigation options: Home, Lead Tracker, New Lead, and Reverification (highlighted in green). The main content area features a search form with two radio buttons: "Recipient ID" (selected) and "Card Control Number". Below the radio buttons is a text input field labeled "Recipient ID" with the placeholder text "Enter Recipient ID". To the right of the input field are "Search" and "Clear" buttons. Below the search form, there is a large white box with a book icon and the text "No Record Searched Yet!". At the bottom of the page, there is a copyright notice: "© 2024 Gainwell. All rights reserved."

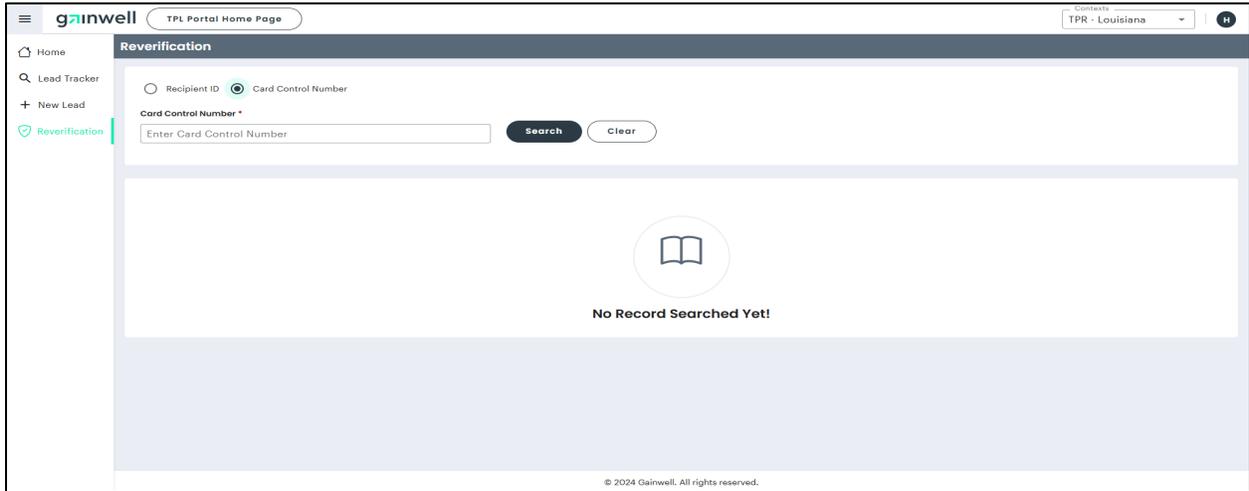
Search by Recipient ID: This field will require 13 numeric digits, and it must be a valid LDH Recipient ID.



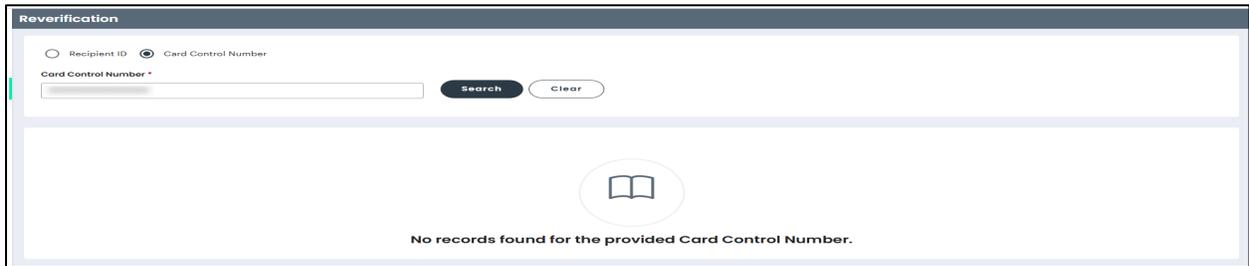
If no records were found with the given “Recipient ID,” the page will display the message “No records found for the provided Recipient ID.”



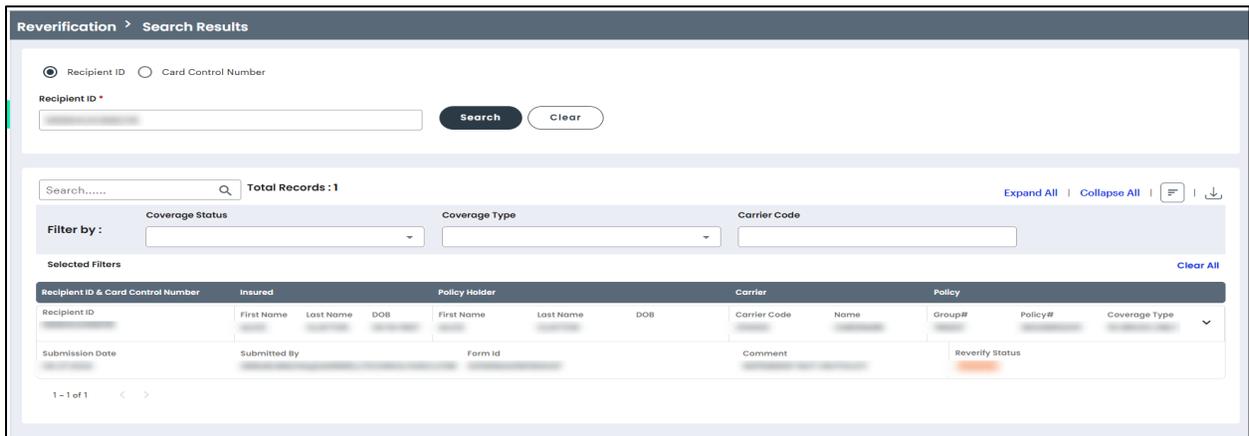
Search by Card Control Number: This field will require 16 numeric digits and must start with 777.



If no records were found with the given “Card Control Number ID,” the page will display “No records found for the provided Card Control Number.”

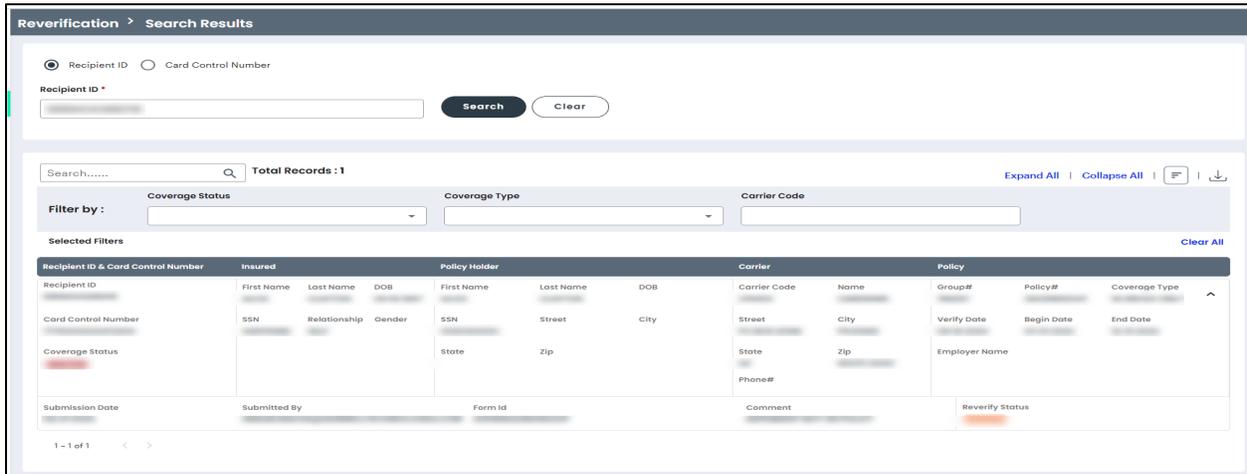


After a valid Recipient ID or Card Control Number has been entered, the user should complete the search by clicking the “Search” button. Search results will display the Member’s TPL Policies. Records displayed on the Reverification Screen are Ordered by: “Carrier Code,” “Group Number,” “Policy Number,” “Start Date,” and “End Date.”



Clear: The “Clear” button resets all values and selections made by the user, and if applicable, search results will also be cleared.

Expand All: Clicking on the “Expand All” link allows the user to view the policy details for all policies displayed.



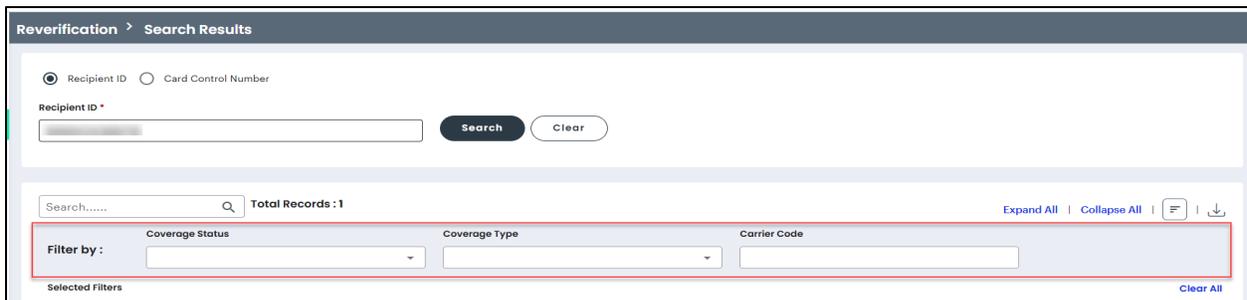
Collapse All: Clicking on the “Collapse All” button will hide most of the details allowing the user to see the summary view.

Filter By: Users can filter the results based on “Carrier Code,” “Coverage Status” and “Coverage Type.”

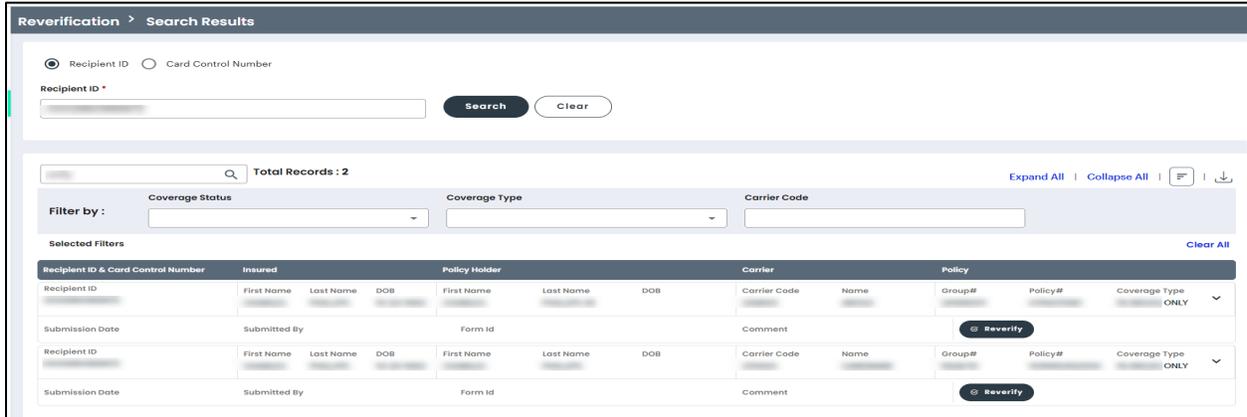
Carrier Code: Entering the 6-digit Client Carrier code will filter results to that one Carrier.

Coverage Status: Options available are in a dropdown list and include All, Active, and Inactive.

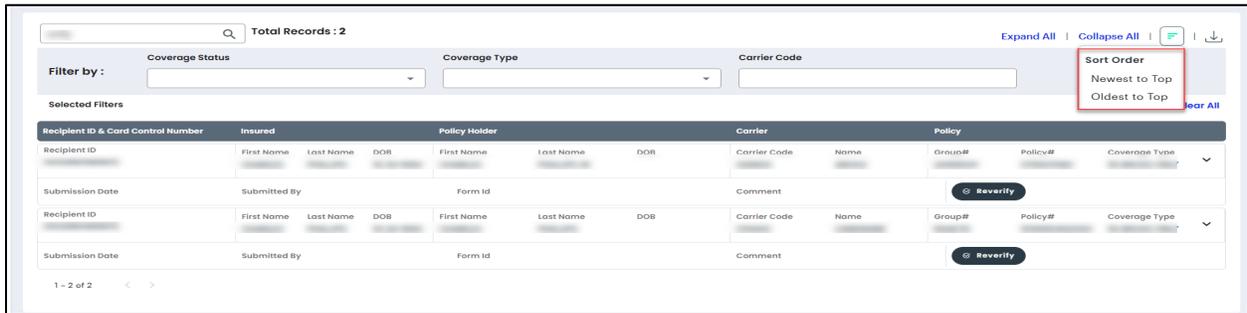
Coverage Type: Options available are in a dropdown list and the list of valid values are available @ [Medicaid | Department of Health | State of Louisiana |](#).



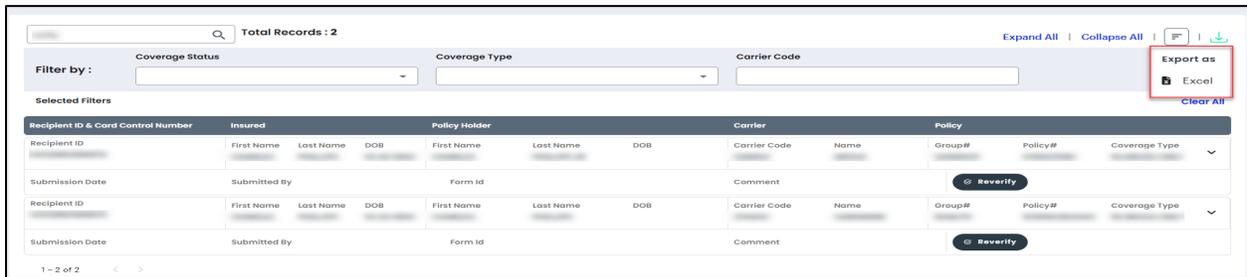
Further filtering tools are available by entering any values from the results grid into the Search input field filter.



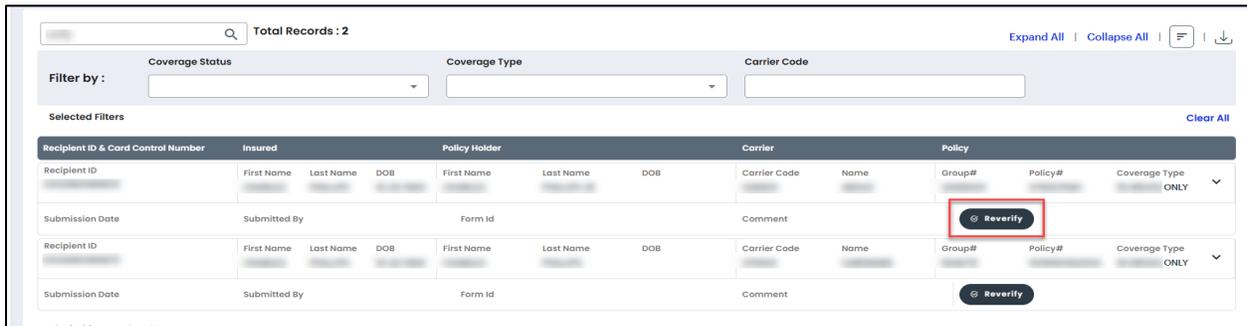
Sort Order: Clicking on the “Sort” button, located next to “Collapse All” link allows the user to sort ascending or descending based on the policy begin date.



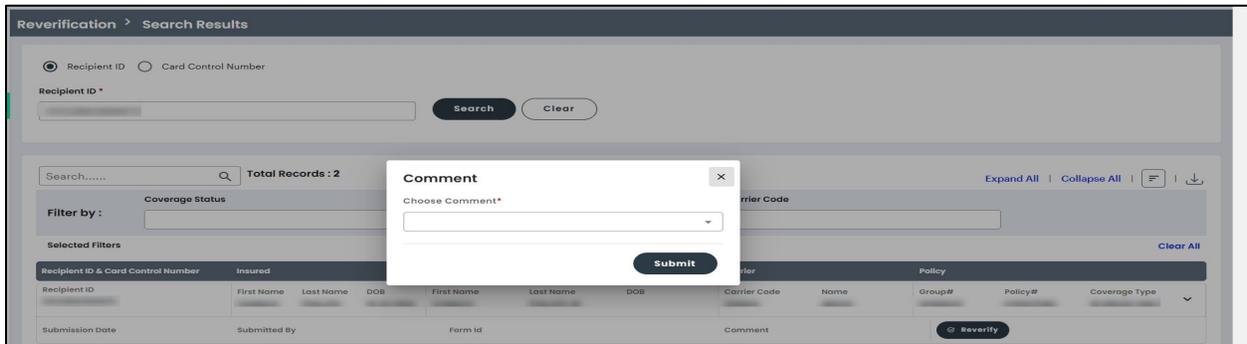
Download: Clicking on the “Download” button allows the user to download the current results policy details in Microsoft Excel format.



Reverify: Clicking the “Reverify” button will allow the users to enter the reason and submit a record for reverification.



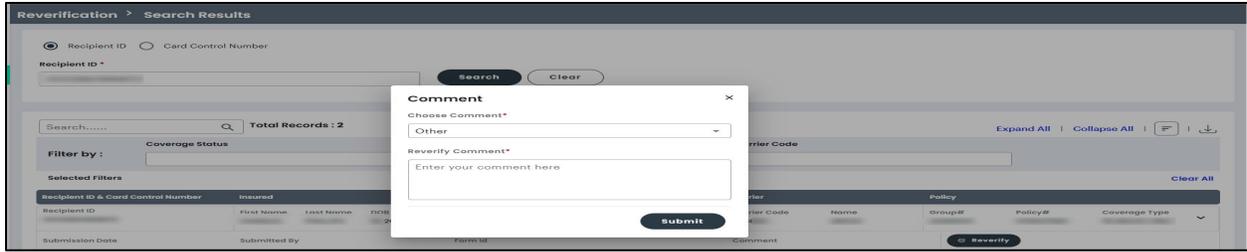
Once the user clicks the “Reverify” button, a pop-up will appear prompting them to select an appropriate comment for reverification in the “Choose Comment” dropdown list.



Available options for the “Choose Comment” dropdown list:

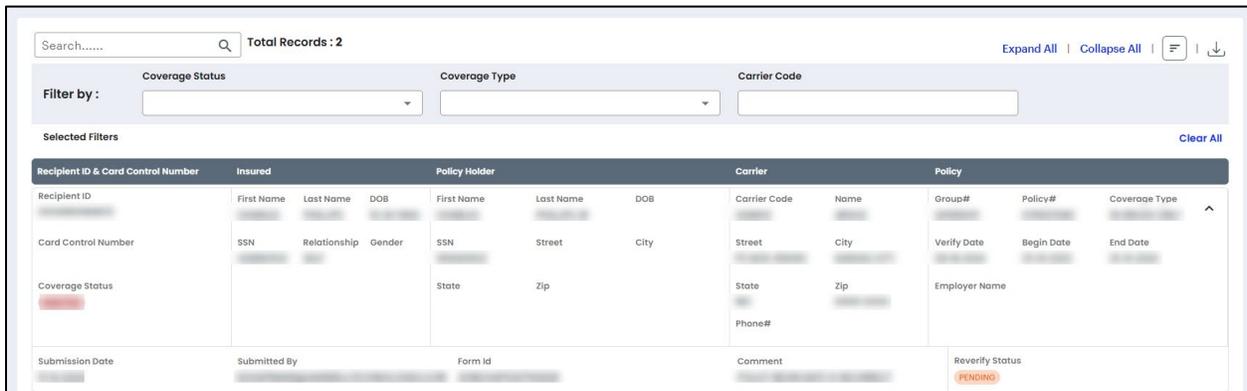
- Policy End Date is incorrect
- Policy does not belong to this Recipient
- Policy Number is incorrect
- Policy Begin Date is incorrect
- Policy Begin and End Dates are incorrect
- Coverage Type is incorrect
- Carrier Code is incorrect – **Note:** The Reverification Request will only take care of updating the record with the existing Carrier Code. The user will also need to submit a New Lead Request for adding the policy with the correct Carrier Code.
- Other

If the “Comment” pop-up doesn’t have the appropriate option available in the dropdown list, there is an “Other” option that allows the user to enter their own comments. After a selection is made in the dropdown list or a manual comment is added the use can complete the process by clicking “Submit.”

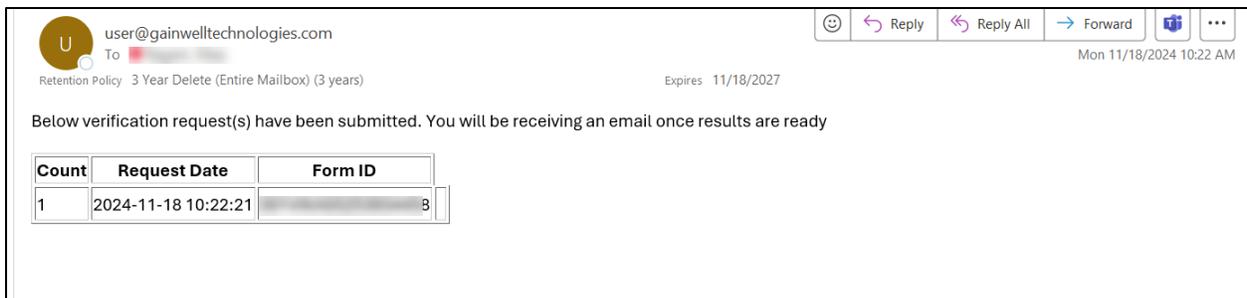


The reverification comment is only a comment for reference, it does not have any impact on the way the Request is processed by the HMS in the backend, or the Responses that are received & uploaded to BTPL.

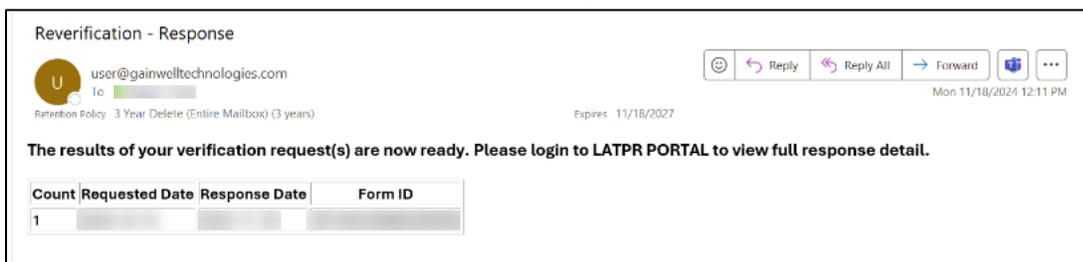
After clicking “Submit,” the “Submission Date,” “Submitted By,” “Form ID,” “Comment,” and “Reverify Status” will be auto populated by the system.



In addition, an email notification with the “Form ID” is sent to the Requester to the email ID associated to the credentials that they used to login to the TPL Portal.



Once the reverification is completed, an email notification is sent to the Requester to the email ID associated to the credentials that they used to login to the TPL Portal.



5.3 New Lead

Clicking on the New Lead Option will redirect the users to the New Lead Panel. Users may submit a New Lead Request for a valid LDH Medicaid Recipient whose TPL Policy is not found via TPR Reverification. Please be advised that Medicare Part A and B records should not be submitted through the TPR New Lead Request UI Panels.

General Information Tab: The General Information Tab allows the user to enter User Tracking ID & choose the Parish associated to the Member on the policy. Verifier, Form ID, Received Date, Source Type and Request Type, Verification Lead fields are auto filled by the system and cannot be edited.

Parish: User can select the parish from the list of drop-down values.

User Tracking ID#: This field accepts up to 20 alphanumeric characters and allows the use of the following symbols `.,-'\/#`.

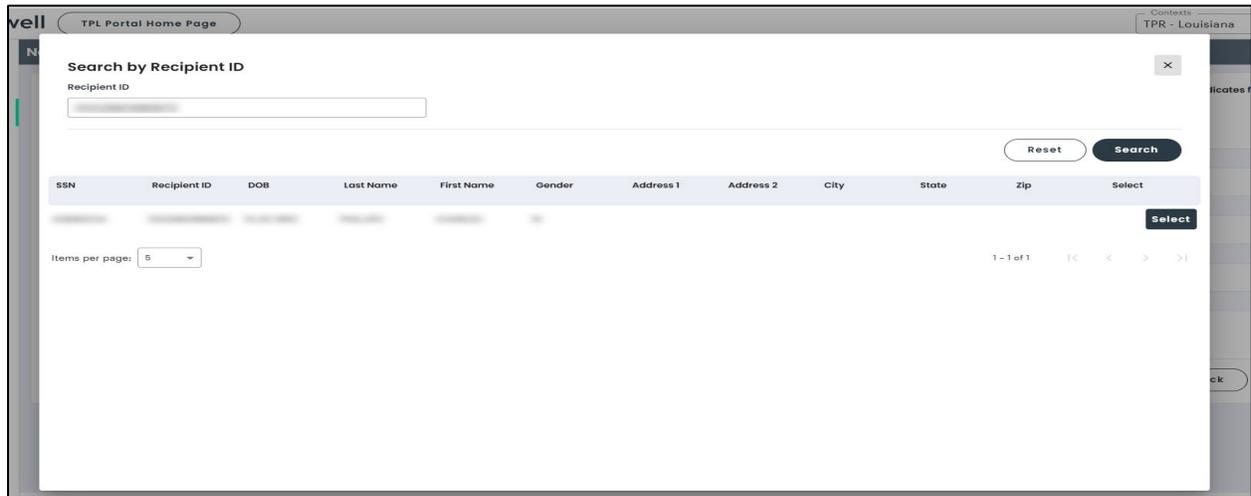
The screenshot shows the 'New Lead' form in the Gainwell TPL Portal. The 'General Information' tab is selected in the left-hand navigation menu. The form contains the following fields: Verifier (User), Form ID (301KCHAP656828377), Received Date (2024-11-14 20:52:37), Source Type (WEB), Request Type (ADD), Verification Lead (General TPL Update), Parish (-Select-), and User Tracking ID#. A 'Next' button is located at the bottom right of the form. A red asterisk indicates that fields with an asterisk are required.

Recipient Information Tab: The Recipient Information section allows the user to add one or more Recipients to the Policy. After entering a valid LDH Recipient ID, click the “Search” button, a pop-up will be displayed showing matching records for the Recipient ID.

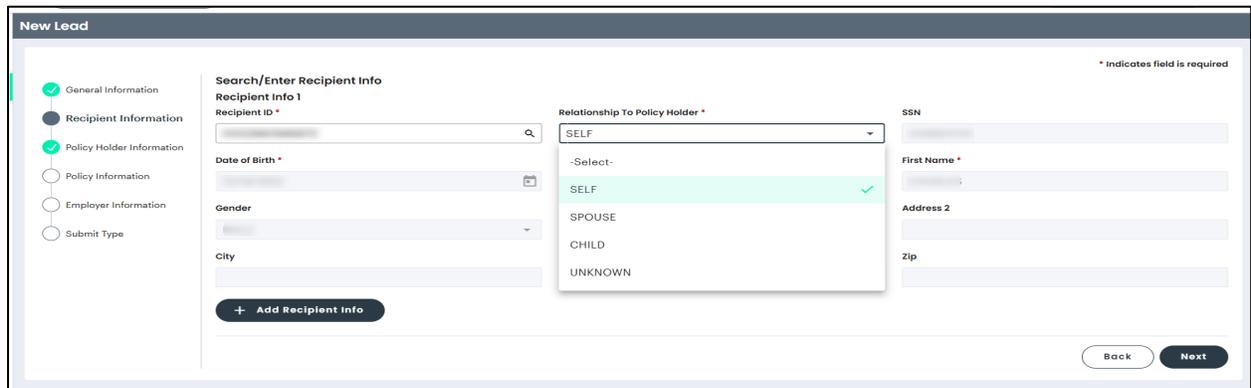
Recipient ID: This field allows 13-digit numeric characters only.

The screenshot shows the 'New Lead' form in the Gainwell TPL Portal, with the 'Recipient Information' tab selected. The form contains the following fields: Recipient ID (with a search icon), Relationship To Policy Holder (-Select-), SSN, Date of Birth (MM/DD/YYYY), Last Name, First Name, Gender, Address 1, Address 2, City, State, and Zip. An 'Add Recipient Info' button is located at the bottom left of the form. 'Back' and 'Next' buttons are located at the bottom right. A red asterisk indicates that fields with an asterisk are required.

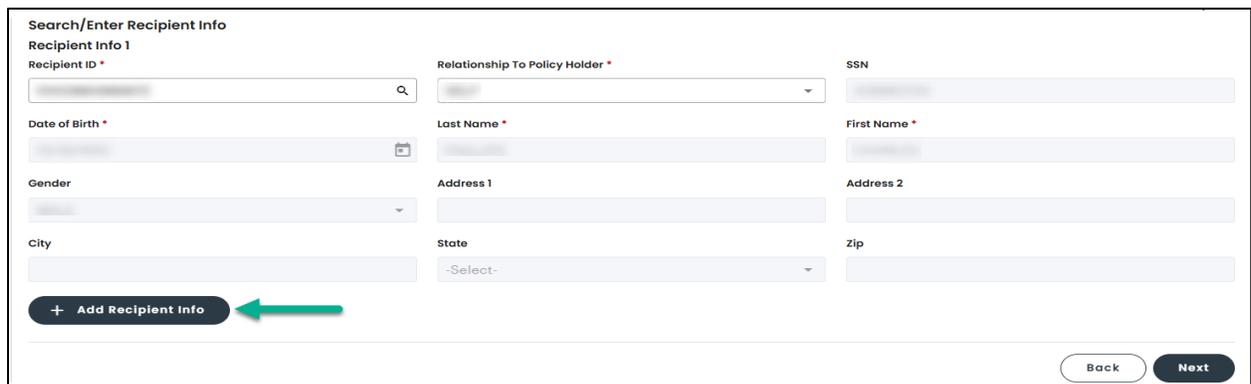
The user can then select the appropriate record from the list and all corresponding fields on the Recipient information tab will be populated accordingly.



The User will then select the appropriate option from the “Relationship To Policy Holder” dropdown list. Options available are Self, Spouse, Child, and Unknown.



Users can add more information on one or more Recipients by clicking the “+ Add Recipient Info” button. The user can only add one “Self” and one “Spouse” Recipient, while multiple “Child” or “Unknown” Recipient relationships are permitted. Each Recipient record will have a unique Recipient ID.



Policy Holder Information Tab: Click on the “Same As Recipient (Will only apply when Recipient Relationship = SELF)” link to retrieve the recipient under Self as a Policy holder. If not, users are required to manually enter all the details associated with the Policy holder.

SSN: This field allows 9-digit numeric characters only.

Last Name: This field allows 20 alphanumeric characters only.

First Name: This field allows 20 alphanumeric characters only.

Address 1: This field accepts up to 40 alphanumeric characters and allows the use of the following symbols .,-'\/#

Address 2: This field accepts up to 40 alphanumeric characters and allows the use of the following symbols .,-'\/#

City: This field accepts up to 40 alphanumeric characters.

Zip: This field accepts up to 10 digit numeric characters and allows the use of the symbol dash(-).

The screenshot shows a web form titled "New Lead" with a sidebar on the left containing navigation options: General Information (checked), Recipient Information (checked), Policy Holder Information (selected), Policy Information (checked), Employer Information, and Submit Type. The main form area is titled "Search/Enter Policy Holder Info" and includes a link "Same As Recipient (Will only apply when Recipient Relationship = SELF)". The form fields are: SSN, Date of Birth, Last Name (marked with an asterisk), First Name (marked with an asterisk), Gender, Address 1, Address 2, City, State, and Zip. A legend in the top right corner states "* Indicates field is required". "Back" and "Next" buttons are located at the bottom right of the form.

Policy Information Tab: Users can search for a valid LDH Carrier ID by clicking the “Search Carrier Info” button.

If the policy is related to a Carrier that is not listed in the LDH Active Carrier listing, then users need to submit a new carrier add request thru Carrier Management component of the TPL Portal. Only after that Carrier has been added to the LDH Active Carrier listing, corresponding policy for that Carrier can be submitted thru the New Lead Panel.

In the “Search by Carrier Info” pop-up, user can search by entering the Carrier Code, selecting an option from the “Carrier Code Format” dropdown list, or searching by “Office Code” or “Carrier Name.”. The “Reset” button will clear all values entered in the fields.

Once the user selects a Carrier, the values in the “Carrier Info” section will be filled in, and all fields will be made inactive/un-editable except for the “Carrier Code” and “Carrier Name” fields.

In the “Policy Info” section, the user can provide the following details: “Policy Number,” “Group Number,” “Coverage Type,” and the respective dates in the “Policy Span” section, including “Effective Date,” “Term Date,” “HIPP Effective Date” and “HIPP Term Date,” and “Comments” in “Notes” section.

Carrier Code: This field accepts up to 10 alphanumeric characters.

Carrier Name: This field accepts up to 40 alphanumeric characters.

Policy#: This field accepts up to 20 alphanumeric characters.

Group#: This field accepts up to 20 alphanumeric characters.

Note:

1. “Effective Date” and “Coverage Type” fields are mandatory and must be completed.
2. The “Effective Date” must not be later than the “Term Date,” and the same rule applies to the “HIPP Effective Date” and “HIPP Term Date.”

Employer Information Tab: The “Employer Information” section includes the following fields: “Name,” “Address 1,” “Address 2,” “City,” “State,” “Zip,” “Contact First Name,” and “Contact Last Name”. While this section is optional, if any fields other than “Name” is entered, the “Name” field becomes mandatory and must be completed to avoid an error.

Name: This field accepts up to 40 alphanumeric characters.

Address1: This field accepts up to 40 alphanumeric characters.

Address2: This field accepts up to 40 alphanumeric characters.

City: This field accepts up to 40 alphanumeric characters.

Zip: This field accepts up to 10 alphanumeric characters.

Contact First Name: This field accepts up to 20 alphanumeric characters.

Contact Last Name: This field accepts up to 20 alphanumeric characters.

The screenshot shows a 'New Lead' form with a sidebar on the left containing navigation options: General Information (checked), Recipient Information, Policy Holder Information, Policy Information (checked), Employer Information (selected), and Submit Type (with a sub-option 'Fill Mandatory Fields'). The main form area is titled 'Search/Enter Employer Info (Optional)' and contains several input fields: Name (with a magnifying glass icon), Address 1, Address 2, City (with a red border and 'This field is required' text), State (dropdown), Zip, Contact First Name, and Contact Last Name. A 'Back' button and a 'Next' button are at the bottom right. A red asterisk indicates required fields.

User can search for an employer name by clicking the “magnifying” icon in the Name field. A popup will display the search results, allowing users to select the desired record from the list. If employer is not found, the users can manually enter all details associated with the Employer in this section

The screenshot shows a 'Search Employer by Name' popup. It has a search input field with a magnifying glass icon, a 'Reset' button, and a 'Search' button. Below the search field is a table with columns: Name, Address1, Address2, City, State, Zip, and Select. The table contains one row of data. At the bottom left, there is an 'Items per page' dropdown set to 5. At the bottom right, there is a '1 - 1 of 1' indicator and navigation arrows. A 'Select' button is located at the bottom right of the table.

Submit Type Tab: The “Submit Type” dropdown list is mandatory and offers two options: “Save as Draft” and “Complete.”

Save as Draft: Selecting this option from the dropdown will allow users to save the entered information without validation.

Complete: Selecting this option from the dropdown will allow the users to submit the Lead but will prompt an error message if any required fields are missing.

The screenshot shows the 'New Lead' form in the 'Submit Type' tab. The form is divided into several sections: 'General Information' (checked), 'Recipient Information', 'Policy Holder Information', 'Policy Information', 'Employer Information', and 'Submit Type'. The 'Submit Type' section contains a dropdown menu with the value '-Select-'. Below the dropdown, there is a red error message: 'This field is required'. The form also includes a sidebar with navigation options: Home, Lead Tracker, New Lead, and Reverification. At the bottom right, there are three buttons: 'Back', 'Reset All', and 'Submit'. The top of the page shows the 'grinwell' logo, 'TPL Portal Home Page', and a dropdown menu for 'Contexts' set to 'TPR - Louisiana'.

5.4 Lead Tracker

Clicking on the Lead Tracker Option will redirect the users to the Lead Tracker Panel. The Lead Tracker panel allows users to view the status of all New Lead and/or Reverification requests that the users have submitted within a year. Users can track their submitted leads using Form ID, Submitted Date, Recipient ID, Recipient SSN, or Lead Status.

Form ID: This is an autogenerated ID field created at the time a user submits a new lead or reverification requests. This field is 20 digits in length and is alphanumeric.

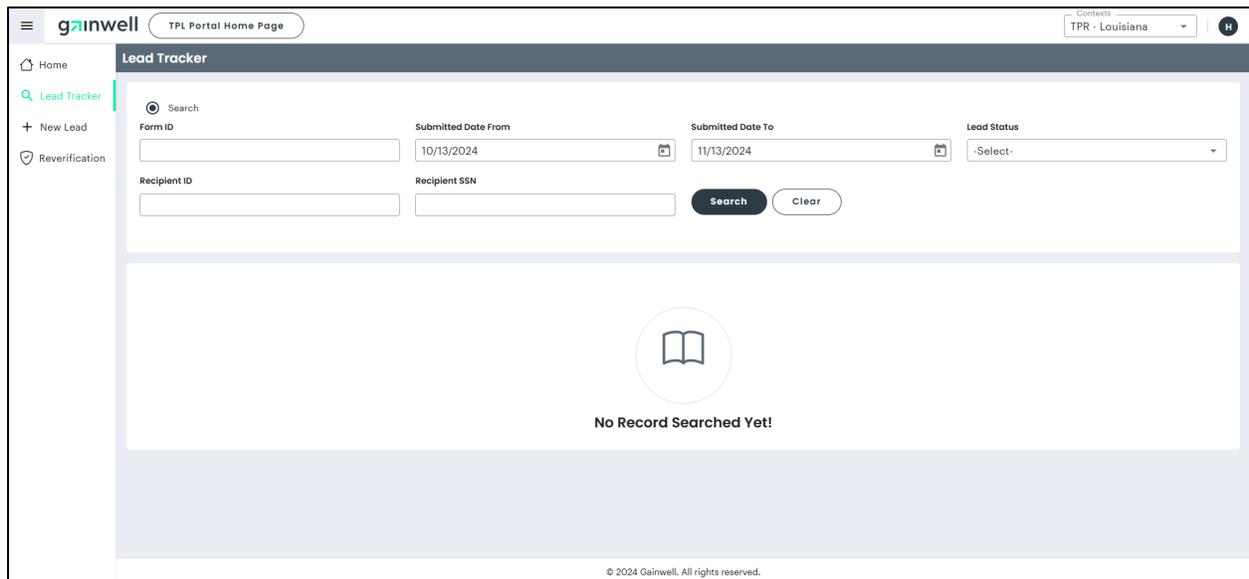
Recipient ID: This field allows 13-digit numeric characters only.

Recipient SSN: This field allows 9-digit numeric characters only.

Lead Status: This field is a dropdown list with the following options for the lead status Save as Draft, In Progress, Completed.

Submitted Date From: This field is editable, yet by default displays a date 30 days prior to the current date and is numeric.

Submitted Date To: This field is editable, yet by default displays shows the current date and is numeric.



The screenshot displays the Gainwell TPL Portal Home Page with the Lead Tracker section active. The interface includes a navigation menu on the left with options for Home, Lead Tracker, New Lead, and Reverification. The main content area features a search form with the following fields: Form ID, Submitted Date From (10/13/2024), Submitted Date To (11/13/2024), Recipient ID, Recipient SSN, and Lead Status (a dropdown menu set to '-Select-'). There are 'Search' and 'Clear' buttons. Below the search form, a large light blue box contains a book icon and the text 'No Record Searched Yet!'. The footer of the page indicates '© 2024 Gainwell. All rights reserved.'

Search using Form ID

The user may enter a Form ID into the search field. After entering the Form ID, click the “Search” button to retrieve the corresponding record. As each Form ID is unique, the search will return a single record that matches the entered ID. The search will use all search attributes so users may need to change the default ‘Submitted Dates’ range as applicable.

The screenshot shows the 'Lead Tracker' search interface. The search criteria are: Form ID: 301KCHAP2086529980, Submitted Date From: 10/13/2024, Submitted Date To: 11/13/2024, and Lead Status: -Select-. The search results table contains one record:

Form		Insured		Policy Holder		Carrier		Policy		Action
Form ID	Date & Time Received	First Name	Last Name	First Name	Last Name	Carrier Code	Name	Group#	Policy#	
301KCHAP2086529980										⋮

Search using Recipient ID

Enter a Recipient ID (13-digit numeric value) in the “Recipient ID” field and click the “Search” button. The search will display all records that matches the selection criteria. The search will use all search attributes so users may need to change the default ‘Submitted Dates’ range as applicable.

The screenshot shows the 'Lead Tracker' search interface with the Recipient ID field populated. The search results table contains three records:

Form		Insured		Policy Holder		Carrier		Policy		Action
Form ID	Date & Time Received	First Name	Last Name	First Name	Last Name	Carrier Code	Name	Group#	Policy#	
										⋮
										⋮
										⋮

Search using Recipient SSN

Enter a Recipient SSN (9-digit numeric value) in the “Recipient SSN” field and click the “Search” button. The search will display all records that matches the selection criteria. The search will use all search attributes so users may need to change the default ‘Submitted Dates’ range as applicable.

The screenshot shows the 'Lead Tracker' search interface. At the top, there are search filters: 'Form ID', 'Submitted Date From' (10/13/2024), 'Submitted Date To' (11/13/2024), and 'Lead Status'. Below these are 'Recipient ID' and 'Recipient SSN' fields. A 'Search' button and a 'Clear' button are present. Below the search area is a table with columns: Form, Insured, Policy Holder, Carrier, and Policy. The table contains two rows of data. At the bottom, there is a 'Items per page' dropdown set to 10 and a page indicator '1 - 2 of 2'.

Search using Submitted Dates

Enter the Submitted To and From Dates or use default date range shown when navigating to the Lead Tracker screen. Users can click on calendar icon to pick or modify the dates in both the “Submitted Date From” and “Submitted Date To” fields.

The screenshot shows the 'Lead Tracker' search interface with a calendar overlay. The 'Submitted Date From' field is set to 10/13/2024 and the 'Submitted Date To' field is set to 11/13/2024. A calendar for November 2024 is displayed, with the 13th highlighted. Below the calendar is a message: 'No Record Searched Yet!'. The 'Search' and 'Clear' buttons are visible.

Click the “Search” button and the search will display all records that matches the selection criteria.

The screenshot shows the 'Lead Tracker' search interface with search criteria highlighted in red. The 'Submitted Date From' is 10/13/2024 and the 'Submitted Date To' is 11/13/2024. The 'Search' button is highlighted. Below the search area is a table with columns: Form, Insured, Policy Holder, Carrier, and Policy. The table contains 10 rows of data. At the bottom, there is a 'Items per page' dropdown set to 10 and a page indicator '1 - 10 of 13'.

Search using Lead Status

Select the “Lead Status” drop-down and select the appropriate option and click the “Search” button. The search will display all records that matches the selection criteria. The search will use all search attributes so users may need to change the default ‘Submitted Dates’ range as applicable.

The Lead Status Drop down allows users to select the lead category. Options are:

- **Save as Draft** will retrieve New Leads that the user has saved as a draft.
- **In Progress** will retrieve submitted New Leads and/or Reverification requests that are in Staged or Loaded status
- **Complete** will retrieve submitted New Leads that are in Duplicate or Verified status and Reverification requests that are in Verified Status.
 - a. A New lead in Duplicate status indicates that the verification process for this new lead request has not been done as another lead already exist in the system with the same information.

Clear: The “Clear” button resets all values and selections made by the user, and if applicable, search results will also be cleared.

Expand All: Clicking on ‘Expand All’ will allow the user to view all details of the Lead Tracker results.

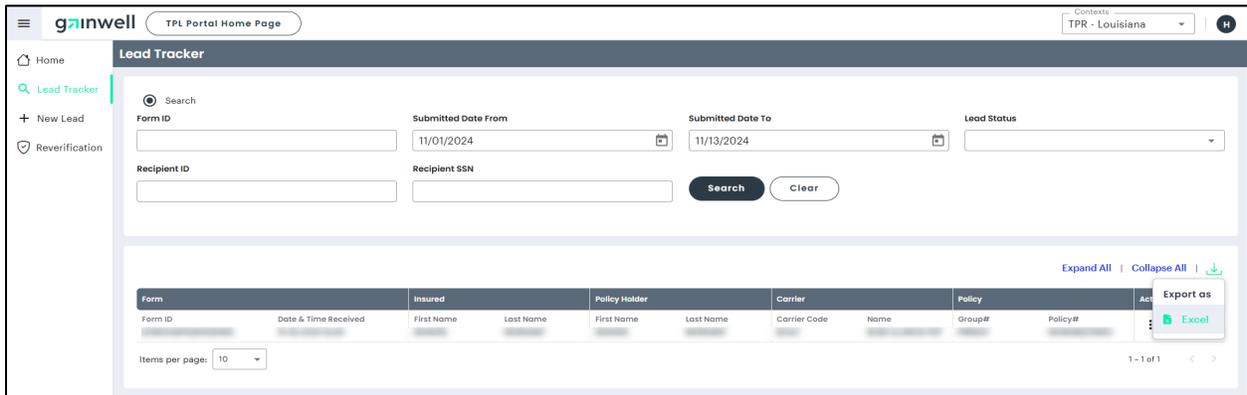
The screenshot shows the 'Lead Tracker' interface. At the top, there is a search section with a 'Search' radio button selected. Below it are input fields for 'Form ID' (30IKCHAP2086529980), 'Submitted Date From' (10/13/2024), 'Submitted Date To' (11/13/2024), and 'Lead Status' (a dropdown menu). There are also empty fields for 'Recipient ID' and 'Recipient SSN', and 'Search' and 'Clear' buttons.

Below the search section is a table of results. The table has columns for 'Form', 'Insured', 'Policy Holder', 'Carrier', 'Policy', and 'Action'. The 'Form' column contains 'Form ID' and 'Date & Time Received'. The 'Insured' column contains 'First Name' and 'Last Name'. The 'Policy Holder' column contains 'First Name' and 'Last Name'. The 'Carrier' column contains 'Carrier Code' and 'Name'. The 'Policy' column contains 'Group#' and 'Policy#'. The 'Action' column contains a dropdown menu with 'Expand' and 'Collapse' options.

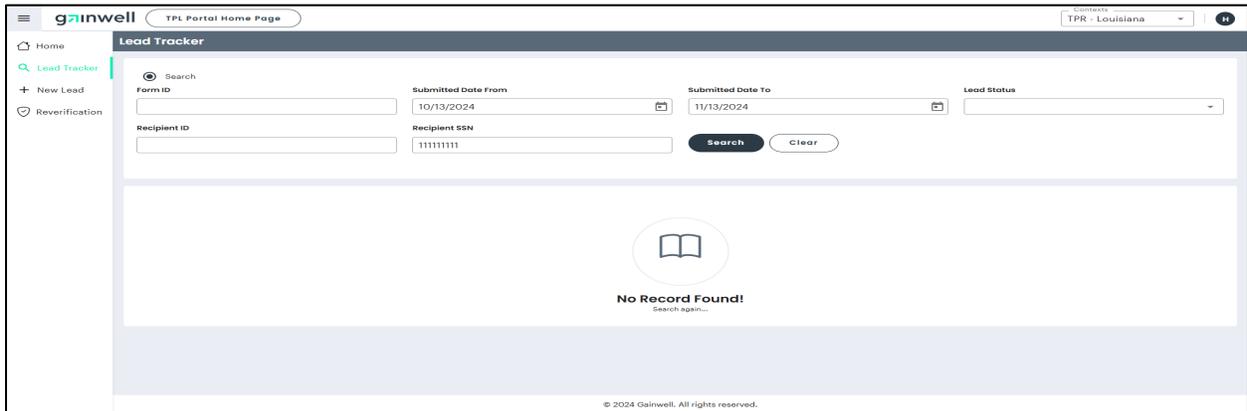
Below the table, there is a 'Status | Type' section with 'STAGED' and 'REVERIFY' buttons, a 'Source Type' field, and 'DOB' and 'SSN' fields. There is also a 'Comment' field and a 'Submitted By' field. At the bottom, there is an 'Items per page' dropdown set to '10' and a '1 - 1 of 1' indicator.

Collapse All: Clicking on “Collapse All” will hide most details allowing the user to view the summary page.

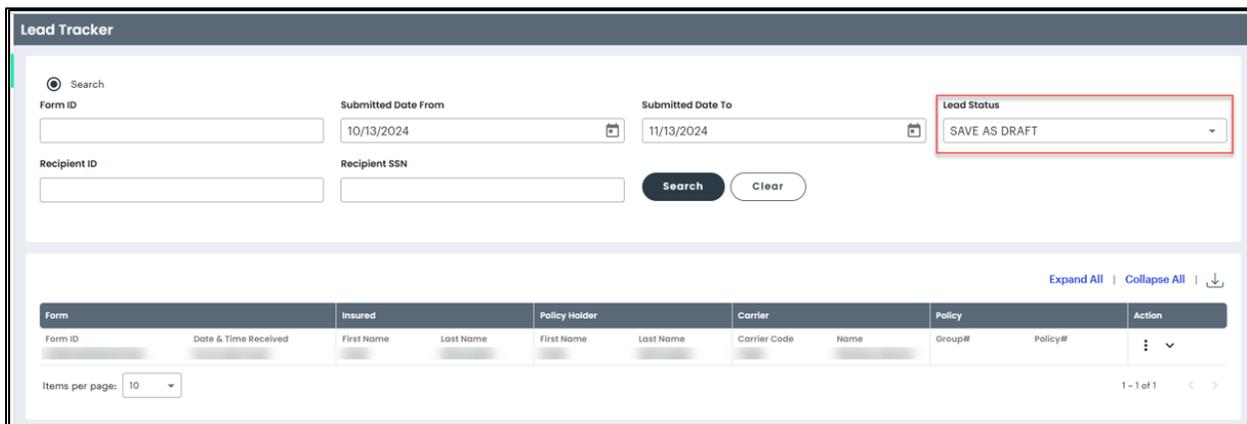
Download: Clicking on the 'Download' button will give user the option to download the Lead Tracker details in Microsoft Excel format.



If no records match the values entered or selected by the user, the page will display the message “No Record Found! Search again...”



Lead Status as **SAVE AS DRAFT**: To view or edit Leads saved as a draft, users can select “Save as Draft” option from the “Lead Status” dropdown list.



When viewing the search results that are in “Save as Draft” status and with the Type as “New Lead”, users can “View” or “Edit” the New Lead by clicking on the “View” or “Edit” in the Action column.

Form		Insured		Policy Holder		Carrier		Policy		Action
Form ID	Date & Time Received	First Name	Last Name	First Name	Last Name	Carrier Code	Name	Group#	Policy#	
Status Type	Source Type	DOB	SSN	DOB	SSN	Street	City	Begin Date	End Date	View Edit
Comment		Relationship	Recipient ID			State	Zip			
Submitted By						Phone#				

Items per page: 10 | 1 - 1 of 1

If the user clicks on the “View” link, the Lead information will be displayed in read-only mode, and no edits will be allowed.

gwinwell | TPL Portal Home Page | Contacts: TPR - Louisiana

Edit Or View Lead

- Home
- Lead Tracker
- New Lead
- Reverification

General Information

- Recipient Information
- Policy Holder Information
- Policy Information
- Employer Information
- Submit Type

Verifier: User

Form ID: 301KCHAP8253127334

Received Date: 2024-10-24 10:29:25

Source Type: WEB

Request Type: ADD

Verification Lead: General TPL Update

Parish: ACADIA

User Tracking ID#

Next

If the user clicks on the “Edit” link, the user will be able to add and/or modify the Lead details and either save it as a draft or submit it once any updates are complete.

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Edit Or View Lead

- Home
- Lead Tracker
- New Lead
- Reverification

General Information

- Recipient Information
- Policy Holder Information
- Policy Information
- Employer Information
- Submit Type**

Submit Type

Submit Type

-Select-

-Select- ✓

SAVE AS DRAFT

COMPLETE

Back **Submit**

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Lead Status as **In Progress**: To view the Leads with a status either “Staged” or “Loaded”, select “In Progress” from the “Lead Status” dropdown list. “Staged” status indicates that the request has been move to the Verification Services queue, and “Loaded” indicates that the request has been sent to the Carrier.

Search

Form ID: [] Submitted Date From: 10/19/2024 Submitted Date To: 11/19/2024 Lead Status: IN PROGRESS

Recipient ID: [] Recipient SSN: [] Search Clear

Form	Insured	Policy Holder	Carrier	Policy	Action
Form ID: [] Date & Time Received: [] Status Type: STAGED NEW LEAD Comment: [] Submitted by: KCHAPMAN@GAINWELLTECHNOLOGIES.COM	First Name: [] Last Name: [] DOB: [] SSN: [] Relationship: [] Recipient ID: []	First Name: [] Last Name: [] DOB: [] SSN: []	Carrier Code: [] Name: [] Street: [] City: [] State: [] Zip: [] Phone#: []	Group#: [] Policy#: [] Begin Date: [] End Date: []	[] []
Form ID: [] Date & Time Received: [] Status Type: STAGED NEW LEAD Comment: [] Submitted by: KCHAPMAN@GAINWELLTECHNOLOGIES.COM	First Name: [] Last Name: [] DOB: [] SSN: [] Relationship: [] Recipient ID: []	First Name: [] Last Name: [] DOB: [] SSN: []	Carrier Code: [] Name: [] Street: [] City: [] State: [] Zip: [] Phone#: []	Group#: [] Policy#: [] Begin Date: [] End Date: []	[] []
Form ID: [] Date & Time Received: [] Status Type: LOADED REVEAL Comment: [] Submitted by: []	First Name: [] Last Name: [] DOB: [] SSN: [] Relationship: [] Recipient ID: []	First Name: [] Last Name: [] DOB: [] SSN: []	Carrier Code: [] Name: [] Street: [] City: [] State: [] Zip: [] Phone#: []	Group#: [] Policy#: [] Begin Date: [] End Date: []	[] []
Form ID: [] Date & Time Received: [] Status Type: LOADED REVEAL Comment: POLICY DOES NOT BELONG TO THIS RECIPIENT Submitted by: []	First Name: [] Last Name: [] DOB: [] SSN: [] Relationship: [] Recipient ID: []	First Name: [] Last Name: [] DOB: [] SSN: []	Carrier Code: [] Name: [] Street: [] City: [] State: [] Zip: [] Phone#: []	Group#: [] Policy#: [] Begin Date: [] End Date: []	[] []

When viewing the search results that are in “Staged” or “Loaded” status and with the Type as “New Lead”, users can view the New Lead details by selecting the “View” link from the “Action” column. Please be advised that users will not be allowed to edit the details of the new lead that are under the “Staged” or “Loaded” status.

vell TPL Portal Home Page

Contexts: TPR - Louisiana

Lead Tracker

Search

Form ID: [] Submitted Date From: 10/19/2024 Submitted Date To: 11/19/2024 Lead Status: IN PROGRESS

Recipient ID: [] Recipient SSN: [] Search Clear

Form	Insured	Policy Holder	Carrier	Policy	Action
Form ID: [] Date & Time Received: [] Status Type: STAGED NEW LEAD Comment: [] Submitted by: []	First Name: [] Last Name: [] DOB: [] SSN: [] Relationship: [] Recipient ID: []	First Name: [] Last Name: [] DOB: [] SSN: []	Carrier Code: [] Name: [] Street: [] City: [] State: [] Zip: [] Phone#: []	Group#: [] Policy#: [] Begin Date: [] End Date: []	[] [] View

When viewing the search results that are in “Staged” or “Loaded” status and with the Type as “Reverify”, the user can select “Request & Response” from the “Action” column.

The screenshot shows the 'Lead Tracker' application interface. At the top, there is a search filter for 'Lead Status' set to 'IN PROGRESS'. Below the search filters is a table with columns: Form ID, Date & Time Received, Insured (First Name, Last Name), Policy Holder (First Name, Last Name), Carrier (Carrier Code, Name), Policy (Group#, Policy#), and Action. The table contains two rows of data. The second row has a status of 'LOADED' and a type of 'REVERIFY'. In the 'Action' column for this row, a button labeled 'Request & Response' is highlighted with a red box.

Request & Response pop-up screen shows the user the details of the record that they submitted the Reverification Request for, and that the Reverification is in progress.

The screenshot shows a 'Request and Response' pop-up window overlaid on the table. The window has a title bar with a close button. It contains the following information:

- Recipient ID: [Redacted]
- Form Id: [Redacted]
- Legend: Original Request (grey dot), New Response (green dot)
- Table with columns: Carrier, Policy, Recipient.
 - Carrier: Carrier Code, Verify Date, Begin Date, End Date
 - Policy: Name, Policy#, Group#, Policy Type
 - Recipient: Last Name, First Name, DOB, SSN
- Bottom status bar: Reverification is in progress... (green background)

Lead Status as **COMPLETE**: If the Lead is in the “Verified” status and the Type is “New Lead,” users can view the New Lead details by selecting the “View” link from the “Action” column.

Form		Insured		Policy Holder		Carrier		Policy		Action
Form ID	Date & Time Received	First Name	Last Name	First Name	Last Name	Carrier Code	Name	Group#	Policy#	
VERIFIED	NEW LEAD	DOB	SSN	DOB	SSN	Street	City	Begin Date	End Date	View
Source Type		Relationship		Recipient ID		State	Zip			
Comment						Phone#				
Submitted By										

Items per page: 10 | 1 - 1 of 1

When viewing the search results that are in “Verified” status and with the Type as “Reverify”, the user can select “Request & Response” from the “Action” column.

TPPL Portal Home Page | Contexts: TPR - Louisiana

Lead Tracker

Search

Form ID: Submitted Date From: 10/19/2024 Submitted Date To: 11/19/2024 Lead Status: COMPLETE

Recipient ID: Recipient SSN:

Form		Insured		Policy Holder		Carrier		Policy		Action
Form ID	Date & Time Received	First Name	Last Name	First Name	Last Name	Carrier Code	Name	Group#	Policy#	
VERIFIED	REVERIFY	DOB	SSN	DOB	SSN	Street	City	Begin Date		Request & Response
Source Type		Relationship		Recipient ID		State	Zip			
Comment						Phone#				
Submitted By										

Items per page: 10 | 1 - 1 of 1

Request & Response pop-up screen shows the user the details of the record before and after the Reverification Request was completed.

The screenshot shows a 'Lead Tracker' interface with a 'Request and Response' pop-up window. The pop-up window contains the following information:

Recipient ID: [Redacted] Form ID: [Redacted]

Legend: ● Original Request ● New Response

Carrier		Policy		Recipient	
Carrier Code	Verify Date	Begin Date	End Date	Last Name	First Name
Name	Policy#	Group#	Policy Type	DOB	SSN
Carrier Code	Verify Date	Begin Date	End Date	Last Name	First Name
Name	Policy#	Group#	Policy Type	DOB	SSN