



# SKYGEN DENTAL HUB

## Quick Start Guide



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## ➤ Important Information

To register and create a business you will need...

- *A **unique email address** for each user registered on the Dental Hub. A general business email will only work to create **one account**. Once used, the same email address will not work for a different account.*
- Tax Identification Number (TIN)
- IRS Form W-9
- A recently **paid claim** or **verification code** (verification codes are sent to you directly from your insurer's provider advocate and are used in those instances where no paid claim is associated with this TIN)

### Helpful Hints

- Any information you enter during the registration process can be edited or deleted after you complete registration
-  A purple circle with a white "i" indicates a tool tip where you can click for a quick video or more detailed help

## Account Setup

### Select Your Account Type

The first step to join the Dental Hub is to create your account. Select your account by choosing which user best describes you.

The screenshot shows a user selection interface. At the top, a progress bar indicates three steps: 'You' (active), 'Your Interests', and 'Next Steps'. The main heading is 'Tell us what best describes you.' Below this, a note says 'Select only one \*'. Three selection cards are presented: 1. 'Practitioner' with a photo of a dentist and the text 'I have a valid NPI and will register using my clinical credentials.' 2. 'Team Member' with a photo of a woman and the text 'I work in a dental office or dental business. NPI clinicians can delegate management of their data to me.' 3. 'General User' with a photo of a man and child and the text 'I want to register in the Dental Hub but today I'm not a practitioner, team member or payer employee.' A 'Begin' button is located at the bottom right of the form.

### Which user type are you?

- **Team Member** - Select this account type if:
  - You will be *the first Dental Hub registrant from your business* **and** you will register **both** yourself and your business or...
  - Your business is already registered on the Dental Hub and you want to register yourself and associate to your business. (You can also register and join your business by accepting an email invitation sent to you by your business's Dental Hub administrator).
- **Practitioner** - A practitioner can self-register at this step. A practitioner can also register later using an email sent by a Team Member from the Dental Hub.
- **General User** - This account type is not associated to any business and has no ability to access or use any Dental Hub business features. As a General User you can create a business later.

## Account Setup

### Create Your Business

You will need to register and create your business to be able to utilize all of the Dental Hub's features. You can elect to register and create your business later, but...

Progress bar: You (grey), Your Interests (blue star), Next Steps (grey checkmark)

What would you like would to do here?

Select One \*

**Create a new business account**  
Are you a business owner or administrator for your business in charge of creating the business?

**Go directly to Dental Hub**  
Not sure what you want to do yet? That's okay you can join the Dental Hub now.  
Create a Business at a later time.

Buttons: Back, Next

...if you select "Go directly to Dental Hub" you will be taken to the Dental Hub Homepage. Your business will not be created and until you complete this step you will be unable to use any features on the Dental Hub.

## ➤ Set Up Your Business

### Step #1 - General Information

To get started using the Dental Hub you will need to register and create your business. This is a quick multi-step process.

The screenshot shows a multi-step registration process. At the top, a horizontal navigation bar contains eight steps: General Info (active), Tax Info, Team Members, Practitioners, Locations, Payers, Billing Entities, and Review. Below the navigation bar, the main heading reads "Tell us some general information about your Business" with an information icon. A note states: "This is what the Dental Hub users will see. It may not be the information used on your TIN or placed in the provider directory." The form contains the following fields:

Business Name *	Primary Contact Name *
<input type="text"/>	<input type="text"/>
Street Address *	Primary Contact Email *
<input type="text"/>	<input type="text"/>
Suite, Unit, Building, Apt, etc.	Primary Contact Phone *
<input type="text"/>	<input type="text"/>
Mailing Address (if different)	
<input type="text"/>	

### Helpful Hints

- As you begin typing your address, Google will auto-populate with address options to select
- Primary contact name field requires a First and Last Name
- The primary contact does not need to be the person creating the business account, but it can be

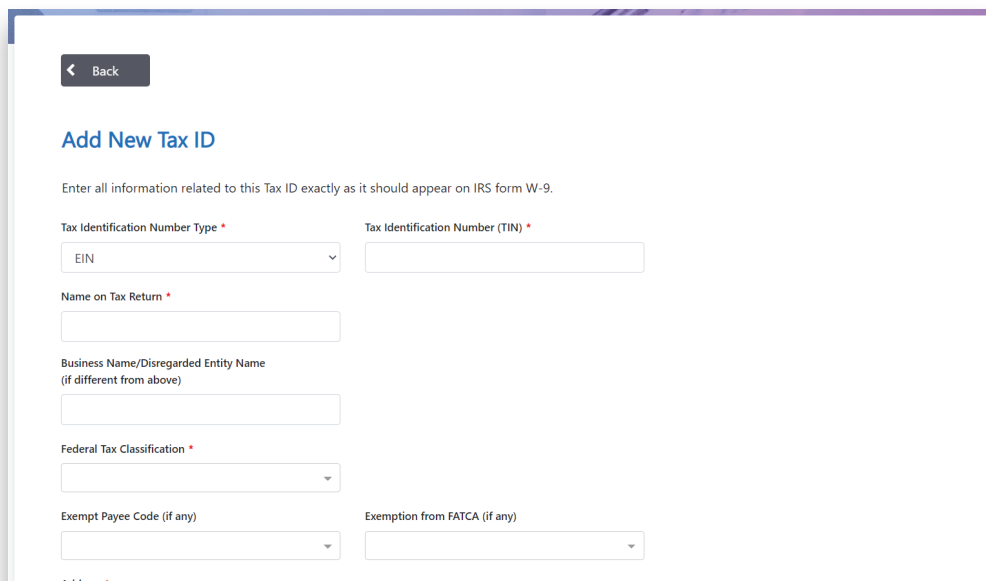
## ➤ Set Up Your Business

### Step #2 - Tax Information

Enter tax information for your business. You'll need:

- Tax identification number (TIN) used by your business to submit claims or enter into contracts
- IRS Form W-9
- A recently paid claim by the insurer you contract with (or a registration code provided by your network provider advocate)

Click on **"Add Tax ID"** on the screen above and the screen below will open. The questions presented follow your IRS Form W-9 exactly. Complete each field. Repeat these steps for each TIN associated to your business.



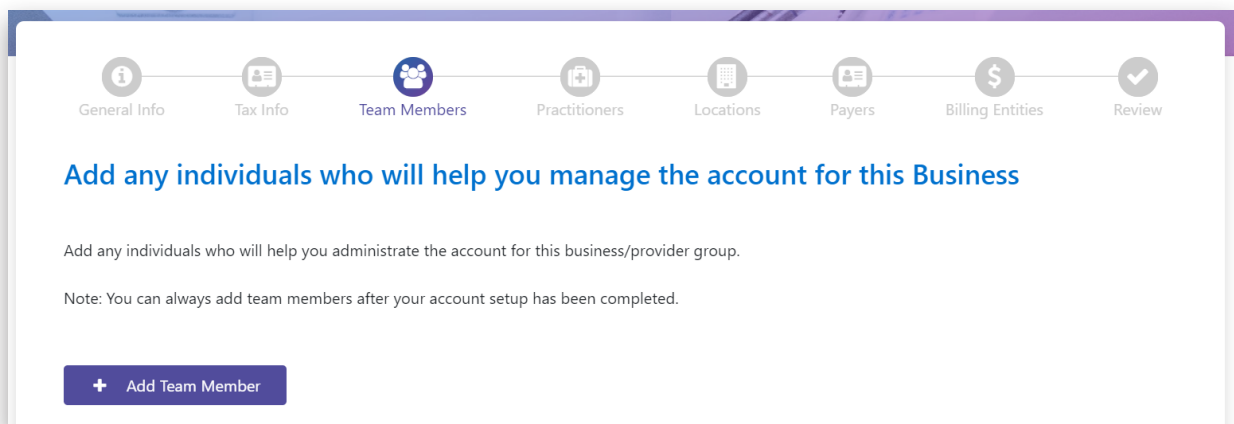
The screenshot shows a web form titled "Add New Tax ID" with a "Back" button in the top left. Below the title is a instruction: "Enter all information related to this Tax ID exactly as it should appear on IRS form W-9." The form contains several fields:

- Tax Identification Number Type \***: A dropdown menu with "EIN" selected.
- Tax Identification Number (TIN) \***: A text input field.
- Name on Tax Return \***: A text input field.
- Business Name/Disregarded Entity Name (if different from above)**: A text input field.
- Federal Tax Classification \***: A dropdown menu.
- Exempt Payee Code (if any)**: A dropdown menu.
- Exemption from FATCA (if any)**: A dropdown menu.
- Address \***: A text input field (partially visible at the bottom).

## ➤ Set Up Your Business

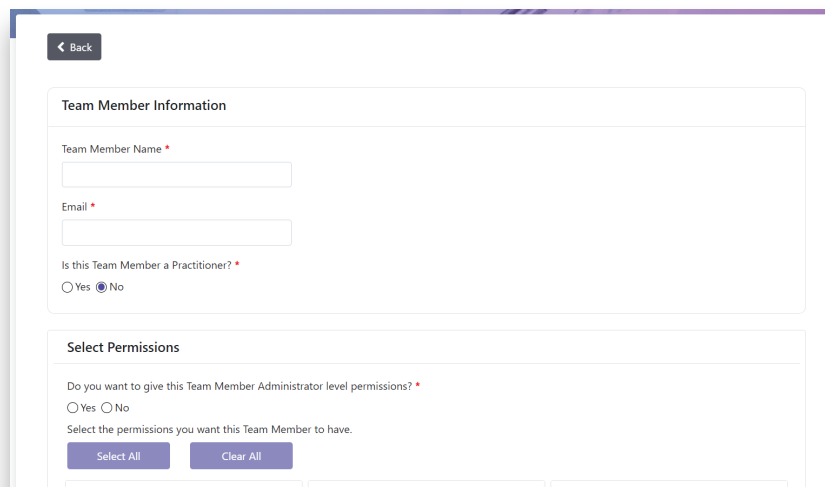
### Step #3 - Team Members

Add team members who will help administer the business. If your business is large, adding team members now is a great idea because it will help you set up multiple practitioners and locations later. If you don't add team members now, they can create their own account later and associate to your business using a Dental Hub invitation (initiated by you and emailed directly to them).



The screenshot shows a progress bar at the top with icons for General Info, Tax Info, Team Members (highlighted), Practitioners, Locations, Payers, Billing Entities, and Review. Below the progress bar, the heading reads "Add any individuals who will help you manage the account for this Business". The main text says "Add any individuals who will help you administrate the account for this business/provider group." and a note states "Note: You can always add team members after your account setup has been completed." At the bottom, there is a purple button labeled "+ Add Team Member".

Begin by selecting **"Add Team Member"** on the above screen and the screen below will open. During this process you will grant permissions to each added team member account.



The screenshot shows a form titled "Add Team Member" with a "Back" button in the top left. The form is divided into two sections: "Team Member Information" and "Select Permissions". In the "Team Member Information" section, there are input fields for "Team Member Name" and "Email", both marked with a red asterisk. Below these is a radio button question: "Is this Team Member a Practitioner?" with "Yes" and "No" options, where "No" is selected. The "Select Permissions" section asks "Do you want to give this Team Member Administrator level permissions?" with "Yes" and "No" radio buttons. Below this, it says "Select the permissions you want this Team Member to have." and provides "Select All" and "Clear All" buttons. At the bottom, there are several checkboxes for selecting specific permissions.

*Each team member requires a unique email. An email already in use by another Dental Hub user cannot be re-used*



## ➤ Set Up Your Business

### Step #4 - Practitioners

Add practitioners to your business here. This process will generate an email invitation for each practitioner you enter to “Join Your Business” on the Dental Hub. Invited practitioners will create their own account using a unique email address.

The screenshot shows a progress bar at the top with eight steps: General Info, Tax Info, Team Members, Practitioners (highlighted), Locations, Payers, Billing Entities, and Review. Below the progress bar, the heading reads "Add any practitioners you would like to associate with your Business". A note states: "You can always add practitioners after your account setup has been completed. You can also delegate adding practitioners to other administrators." Below this, a paragraph explains: "Add Practitioners to your business roster then select the features and locations they can have access to on the Dental Hub. An invitation to connect will be sent at the end of your Practitioner's creation to give them the ability to create an account and accept the invitation to your business. After 15 days the invitation and link will expire and new invitation to connect will need to be sent." A final note says: "Note - You can always add administrators after your account setup has been completed. While is self registration you are unable to disassociate from your business, this ability will be available after registration." At the bottom left, there is a blue button with a plus sign and the text "Add Practitioner".

Begin by selecting “**Add Practitioner**” on the above screen and the screen below will open.

The screenshot shows a form titled "Practitioner Information" with a "Back" button at the top left. The form has a section for "NPI" with a text input field. At the bottom, there are "Submit" and "Cancel" buttons.

### Helpful Hints

- The NPI you enter will be verified with the NPI registry
- The Dental Hub verifies taxonomy codes for each practitioner from the NPI registry. If the taxonomy codes are incorrect on the NPI registry, the practitioner will need to login to their Dental Hub account and update the information.

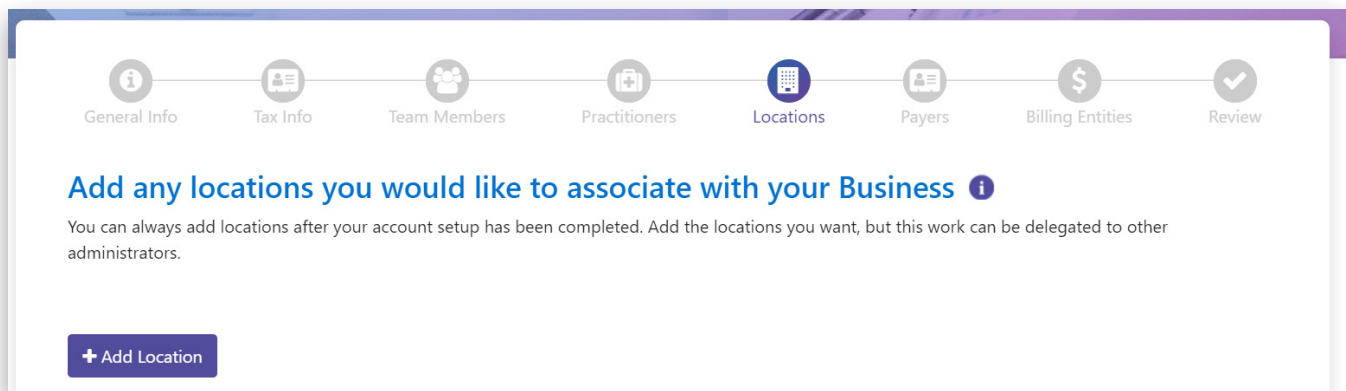
*For all Dental Hub submissions - prior authorizations, claims, etc., you must associate your practitioner(s) to your business*

## ➤ Set Up Your Business

### Step #5 - Locations

Add any or all locations your business has. If your location is the same as the information you entered under Step 1 "General Information", you will still need to add that location here, even though the business will be the same address.

Location information is used to create your provider directory - adding as much detail as possible improves the accuracy of your provider directory. At minimum, associate each practitioner to each of their practice locations.



Begin by selecting **"Add Location"** on the above screen and the screen below will open.

The screenshot shows the "Add Location" form with a "Back" button at the top left. The form contains the following fields:

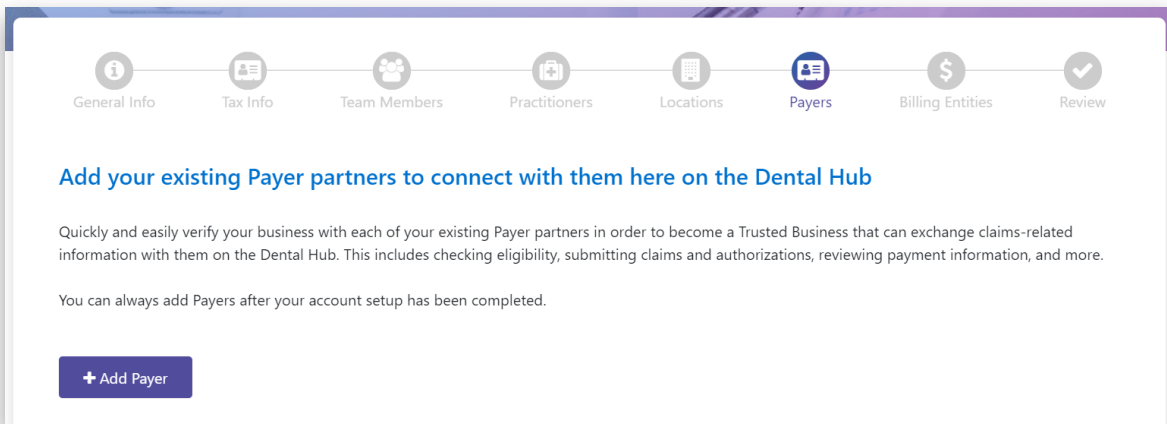
- Location Name \*
- Primary Phone \*
- Place of Service \*
- Mobile Phone
- Address \*
- Text Telephone (TTY)
- Suite, Unit, Building, Apt, etc.
- Emergency Phone
- Website Address
- After Hours Phone

*To accurately check eligibility, submit claims, etc., you must associate each practitioner to each of their practice location(s)*

## ➤ Set Up Your Business

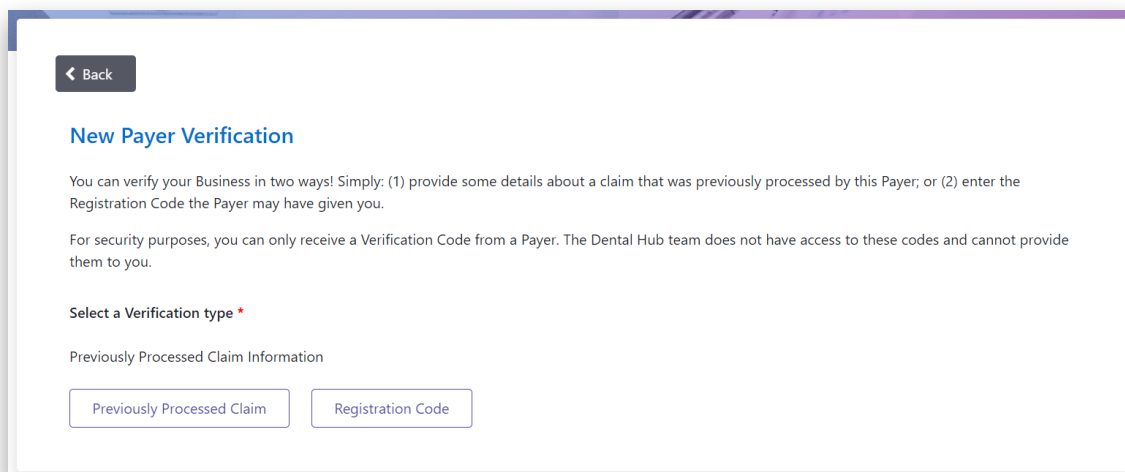
### Step #6- Payers

Add your Payer Partners here in order to become a Trusted Business with every payer/insurer with whom you want to use and exchange PHI. This step is required to be able to check eligibility, submit claims and authorizations and review payment information with that payer/insurer.



The screenshot shows a progress bar at the top with eight steps: General Info, Tax Info, Team Members, Practitioners, Locations, Payers, Billing Entities, and Review. The 'Payers' step is highlighted with a blue circle and a checkmark. Below the progress bar, the text reads: "Add your existing Payer partners to connect with them here on the Dental Hub". It explains that users can quickly verify their business with existing payer partners to become a Trusted Business. A blue button labeled "+ Add Payer" is located at the bottom left of the screen.

Begin by selecting **"Add Payer"** on the above screen and the screen below will open.



The screenshot shows the "New Payer Verification" screen. It features a "Back" button in the top left corner. The main heading is "New Payer Verification". Below the heading, there is explanatory text: "You can verify your Business in two ways! Simply: (1) provide some details about a claim that was previously processed by this Payer; or (2) enter the Registration Code the Payer may have given you." A security notice follows: "For security purposes, you can only receive a Verification Code from a Payer. The Dental Hub team does not have access to these codes and cannot provide them to you." Below this, there is a section titled "Select a Verification type \*" with the sub-heading "Previously Processed Claim Information". At the bottom, there are two buttons: "Previously Processed Claim" and "Registration Code".

## ➤ Set Up Your Business

### Step #6 - Payers

Becoming a Trusted Business with each of your payer/insurer partners is easy! You can verify the “trusted business” relationship through either: 1). Entering information from a claim the payer/insurer recently processed for your business or 2). Entering a registration code the payer/insurer provided to you directly.

#### Previously Processed Claim

**Previously Processed Claim** | **Registration Code**

#### Previously Processed Claim Information

Provide the following information about a claim that was previously processed.

**Tax ID \***

**Select Payer \***

**Subscriber ID \***

**Total Billed Amount \***  
\$

**Date Of Service \***

**Verify** | **Cancel**

#### Registration Code

**Previously Processed Claim** | **Registration Code**

#### Registration Code

Provide the following information about a claim that was previously processed.

**Tax ID \***

**Select Payer \***

**Registration Code \***  
 [Don't have a code?](#)

**Verify** | **Cancel**

## ➤ Set Up Your Business

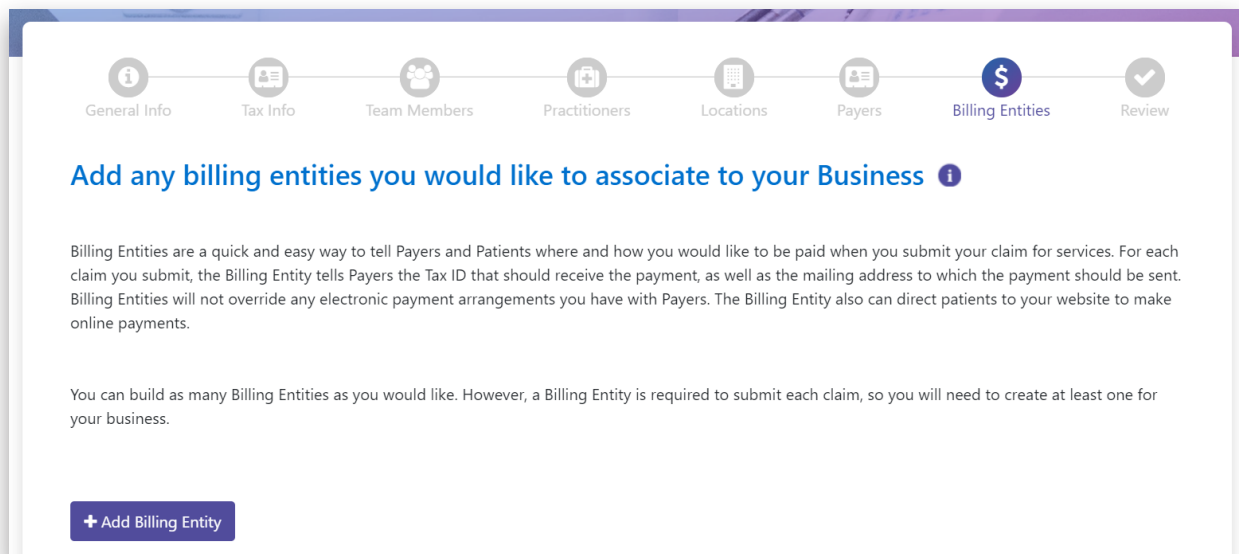
### Step #7 - Billing Entity

By creating a billing entity you will not need to repeatedly enter these details with each transaction (claim, auth, etc.) you submit through the Dental Hub. The Dental Hub uses this step to combine a number of critical elements required for accurate claim submission, processing and payment.

A billing entity includes:

- TIN
- Billing NPI
- Billing NPI taxonomy
- Address where payments are sent

By creating a billing entity, you do not need to enter this information individually for every submission you make. Depending on how your business bills, you can create one billing entity or many. You must create at least one billing entity for your business before you can submit any claims, authorizations, treatment plans or check patient eligibility.



The screenshot shows a progress bar with eight steps: General Info, Tax Info, Team Members, Practitioners, Locations, Payers, Billing Entities, and Review. The 'Billing Entities' step is highlighted with a blue circle and a dollar sign icon. Below the progress bar, there is a heading: "Add any billing entities you would like to associate to your Business" followed by an information icon. The text below explains that Billing Entities are used to tell Payers and Patients where and how to be paid, and that at least one Billing Entity is required to submit each claim.

**Add any billing entities you would like to associate to your Business** ⓘ

Billing Entities are a quick and easy way to tell Payers and Patients where and how you would like to be paid when you submit your claim for services. For each claim you submit, the Billing Entity tells Payers the Tax ID that should receive the payment, as well as the mailing address to which the payment should be sent. Billing Entities will not override any electronic payment arrangements you have with Payers. The Billing Entity also can direct patients to your website to make online payments.

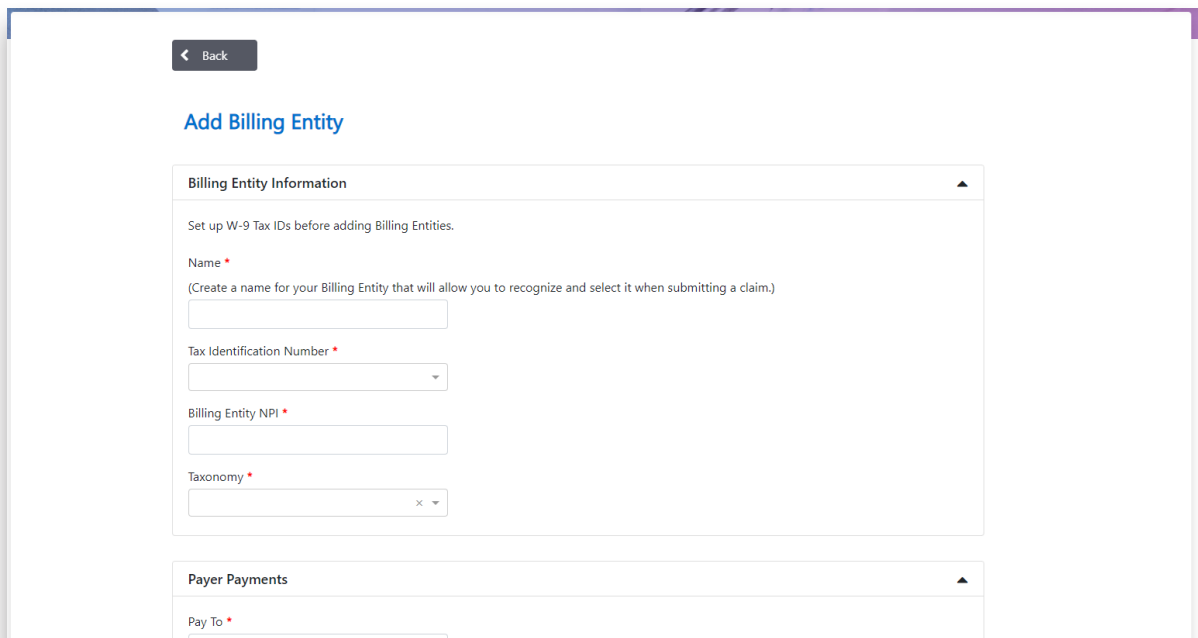
You can build as many Billing Entities as you would like. However, a Billing Entity is required to submit each claim, so you will need to create at least one for your business.

[+ Add Billing Entity](#)

## ➤ Set Up Your Business

### Step #7 - Billing Entity Continued

Begin by selecting **“Add Billing Entity”** on the prior screen and the screen below will open.



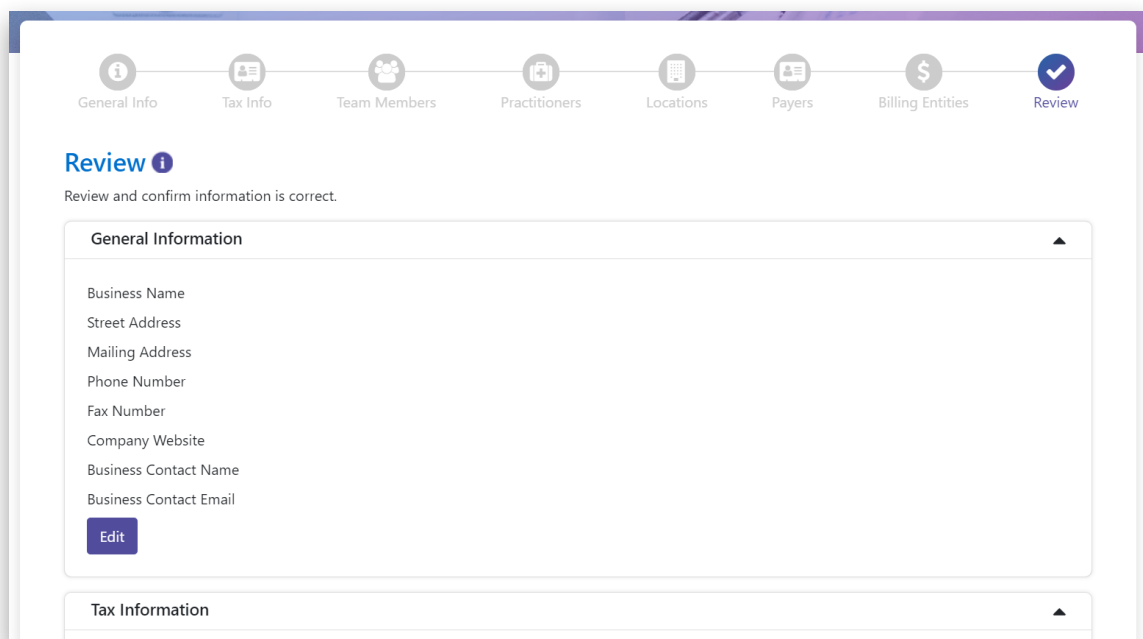
The screenshot shows a web interface for adding a billing entity. At the top left, there is a 'Back' button. The main heading is 'Add Billing Entity'. Below this is a section titled 'Billing Entity Information' with a collapse arrow. Underneath, there is a note: 'Set up W-9 Tax IDs before adding Billing Entities.' The form contains several fields: 'Name' (with a red asterisk and a sub-note: '(Create a name for your Billing Entity that will allow you to recognize and select it when submitting a claim.)'), 'Tax Identification Number' (with a red asterisk and a dropdown arrow), 'Billing Entity NPI' (with a red asterisk), and 'Taxonomy' (with a red asterisk and a dropdown arrow). Below this section is another section titled 'Payer Payments' with a collapse arrow, containing a 'Pay To' field with a red asterisk.

### Helpful Hints

- Select any TINS already created for the business
- Enter Billing Entity NPI - If you bill under a practitioner (individual) NPI, enter their NPI and taxonomy code. If your business uses a Billing (organizational) NPI, enter it and the associated taxonomy code. (If you do not know the Billing NPI taxonomy code, you can look it up on the NPI registry).
- You can set up more than one Billing Entity to meet your business needs

## ➤ Set Up Your Business Last Step! - Final Review

In the final step review all of the information you entered. You can edit anything that is incorrect from this page before you create the business. And don't worry, this information can be edited later at anytime too.

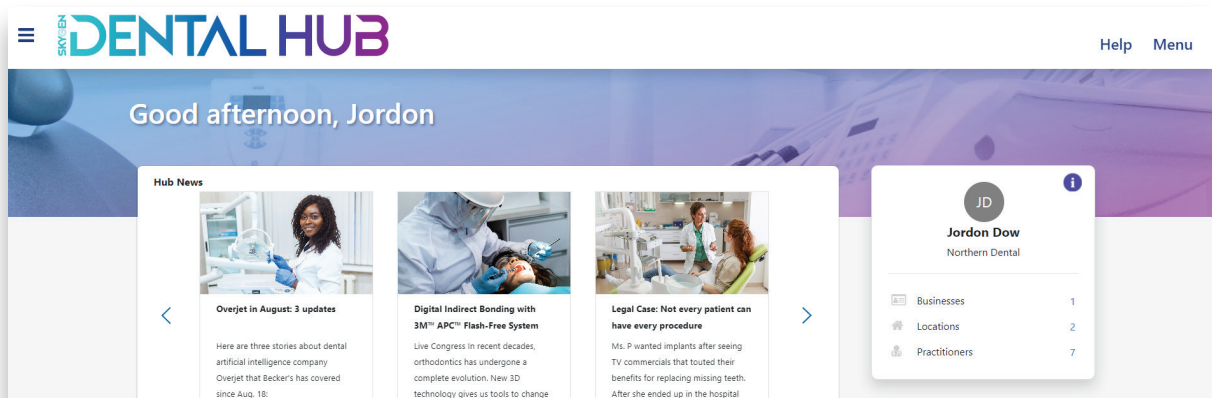


The screenshot shows a progress bar at the top with eight steps: General Info, Tax Info, Team Members, Practitioners, Locations, Payers, Billing Entities, and Review. The 'Review' step is highlighted with a checkmark icon. Below the progress bar, the 'Review' section is titled 'Review' with an information icon. A message states 'Review and confirm information is correct.' Below this, there are two expandable sections: 'General Information' and 'Tax Information'. The 'General Information' section is expanded and lists the following fields: Business Name, Street Address, Mailing Address, Phone Number, Fax Number, Company Website, Business Contact Name, and Business Contact Email. An 'Edit' button is located at the bottom left of the 'General Information' section.

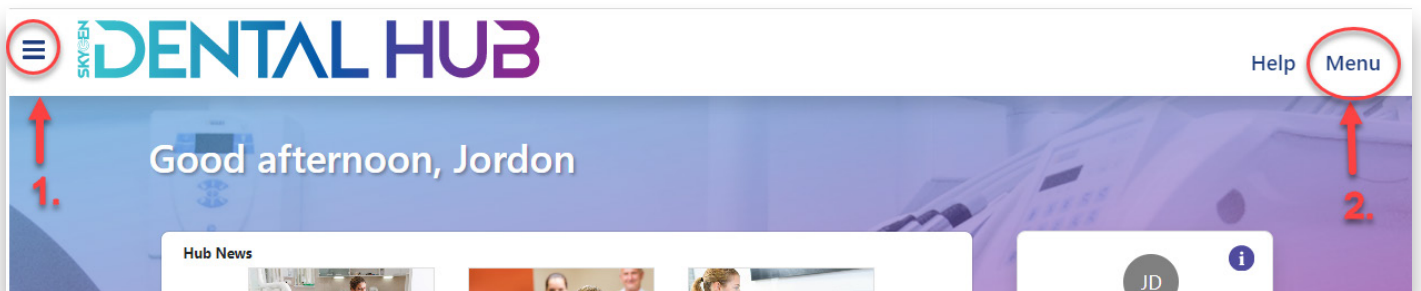
*Select the "Edit" button to return to the page and edit any information.*

Once you submit the information, you will have successfully created your business and are ready to start using the Dental Hub!

## ➤ Navigating Home Page



This is your Home Page. From here you have two ways to navigate around.



1. Click the "Menu Icon" in the top left and the main menu will open.
2. Click "Menu" in the top right and the main menu will open.



# Eligibility & History

## Checking Patient Eligibility

The screenshot shows the 'Eligibility & History' interface with three steps: 'Patient & Insurance' (active), 'Dentist & Location', and 'Eligibility Check Results'. The 'Patient Information' section includes a 'Subscriber ID or Medicaid ID' field with a 'RECOMMENDED' label and a 'Search Roster' button. Below are fields for 'First Name', 'Last Name', 'Date of Birth' (format mm/dd/yyyy), and 'Procedure Date' (08/29/2022). At the bottom, there are dropdown menus for 'Patient's Relationship to Subscriber' (set to 'Self') and 'Insurer' (set to 'Search by Insurers').

### Step 1: Patient & Insurance

- Enter patient information manually or by the Search Roster (patient roster can be created under Patient Management or Patient Search)

The screenshot shows the 'Eligibility & History' interface with three steps: 'Patient & Insurance', 'Dentist & Location' (active), and 'Eligibility Check Results'. The 'Selected Patient' section displays fields for 'Date Of Birth', 'Member ID', 'Insurer', and 'Benefit Level', with links for 'Benefit Summary' and 'Service History'. The 'Primary Care Provider & Location' section is empty. The 'Treating Dentist Information' section includes dropdown menus for 'Treatment Location', 'Treating Dentist', and 'Dentist Taxonomy'.

### Step 2: Practitioner & Location

- If the Treatment Location you want does not populate in the drop down menu, go to the Locations page to create that location

## ➤ Eligibility

# Eligibility & History

## Checking Patient Eligibility Continued

- If the Treating Practitioner you want does not populate in the drop down menu, go to the Practitioners page and add the practitioner. If the practitioner is already added, go to the Locations page and make sure the practitioner is associated to that location/business
- If the correct taxonomy code for the practitioner does not populate, the practitioner will need to login to their Dental Hub account and update the information
- If the Billing Entity you are looking for does not populate in the drop down menu, go to the Billing Entity page and add the Billing Entity

The screenshot shows the 'Eligibility Check Results' page in the Dental Hub interface. The page is divided into three main sections: 'Patient & Insurance', 'Dentist & Location', and 'Eligibility Check Results'. The 'Eligibility Check Results' section is currently active, indicated by a checkmark icon. The 'Selected Patient' section displays fields for Date Of Birth, Member ID, Insurer, and Benefit Level, along with an 'Options' dropdown menu. Below this section are links for 'Benefit Summary', 'Service History', and 'Eligibility'. The 'Treating Dentist & Location' and 'Primary Care Provider & Location' sections are currently empty. At the bottom of the page, there are buttons for 'Treatment Plan Calculator', 'Submit Claim', and 'Submit Authorization', and a 'Back' button in the bottom left corner.

### Step 3: Eligibility Check Results

- If the patient is determined to be eligible and the practitioner is in network, the Dental Hub will populate the Primary Care Information if the plan uses Primary Care Providers
- From this step, you can submit a claim, authorization or treatment plan for the patient. You can also open and view the Benefit Summary, Service History or Eligibility reports

## ➤ Claims & Authorizations

### Submit Claim, Submit Authorization, Treatment Plan Calculator

The screenshot shows a web form titled "Patient Information" with a search icon and "Search Roster" text. The form is divided into three sections: "Patient & Insurance", "Dentist & Location", and "Code Entry". The "Patient & Insurance" section contains the following fields:

- Subscriber ID or Medicaid ID (text input)
- RECOMMENDED (text label)
- First Name \* (text input)
- Last Name \* (text input)
- Date of Birth \* (text input with placeholder "mm/dd/yyyy")
- Procedure Date \* (text input with value "08/30/2022")
- Patient's Relationship to Subscriber: \* (dropdown menu with "Self" selected)
- Insurer \* (dropdown menu with "Search by Insurers" selected)

A "Continue" button is located at the bottom right of the form.

- **Claim** - Submit a claim to be paid for services rendered
- **Authorization** - Submit a prior authorization before services are rendered to obtain plan approval for the care
- **Treatment Plan** - Submit a treatment plan before services are rendered to determine exactly what and how the claim will be adjudicated

These processes work like Eligibility and Status & History. Refer to those pages for any additional help or tips.

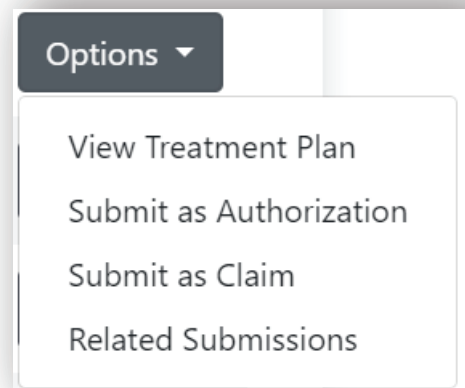
## Claims & Authorizations Status & History

The screenshot shows a dashboard titled "Status & History". At the top, there are four summary boxes: "All" with a count of 165, "Submitted" with 33, "Processed" with 128, and "Review Required" with 4. Below this is a filter bar that says "Filters | 0 Applied". A table follows with columns for Type, Insurer, Patient, Location, Dentist, Service Date, Service Entered, Status, and an Options button. Three rows of claim data are visible.

Type	Insurer	Patient	Location	Dentist	Service Date	Service Entered	Status	Options
Claim	Demo Insurer	AJ MARTIN	Northern Dental	Molly Blue	08/29/2022	08/29/2022	Processed	Options
Claim	Demo Insurer	SHARON ZANDER	Northern Dental	Molly Blue	08/29/2022	08/29/2022	Processed	Options
Claim	Demo Insurer	AJ MARTIN	Northern Dental	Molly Blue	08/25/2022	08/25/2022	Processed	Options

On this Status & History page, you will find all claims, authorizations and treatment plans that have been submitted through the Dental Hub. To view submissions that were not submitted through the Dental Hub, use the Claim Search and Authorization Search pages.

Clicking on the "Options" button will expand a drop down menu with options available related to the type of submission listed.



## Practice Management

# Documents

## Viewing and Searching for Remits

The Remits report provides the claim processing details and remittance/payment advice information for each claims payment cycle.

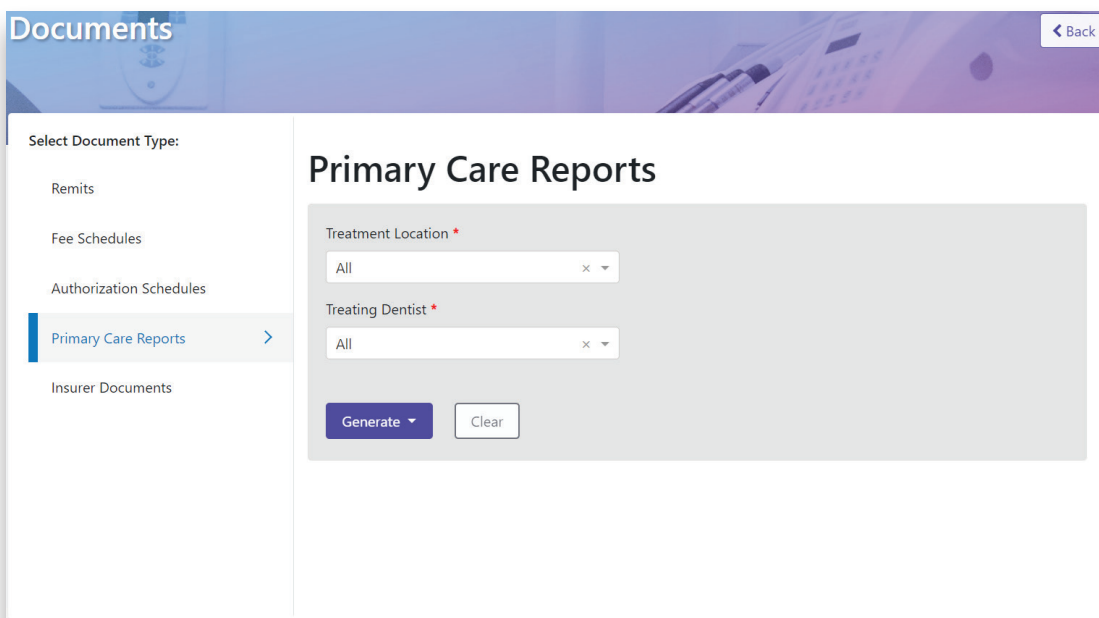
The screenshot shows a web application interface for document management. On the left, a sidebar titled "Select Document Type:" lists several categories: "Remits" (highlighted with a blue bar and a right-pointing arrow), "Fee Schedules", "Authorization Schedules", "Primary Care Reports", and "Insurer Documents". The main content area is titled "Search Remits" with an information icon. Below the title is a search form with two date input fields: "From: 05/31/2022" and "To: 08/29/2022". To the right of these fields are two buttons: "Search" (in blue) and "Clear" (in white with a grey border). Below the search form is a table with four columns: "Date", "Insurer", "Amount", and "View". Each column header has a small double-headed arrow icon. The table body is currently empty, displaying a grey message box that says "Unable to load remits, please try again later". At the top left of the interface is the word "Documents" in white text on a blue background, and at the top right is a "< Back" button.

### To find remits...

- Under the Main Menu, locate "Practice Management" menu
- Select "Documents"
- Select "Remits"

## Practice Management Documents Primary Care Reports

The primary care reports provide details of members assigned to your practice for primary care coordination such as the main dental home or main medical home programs.



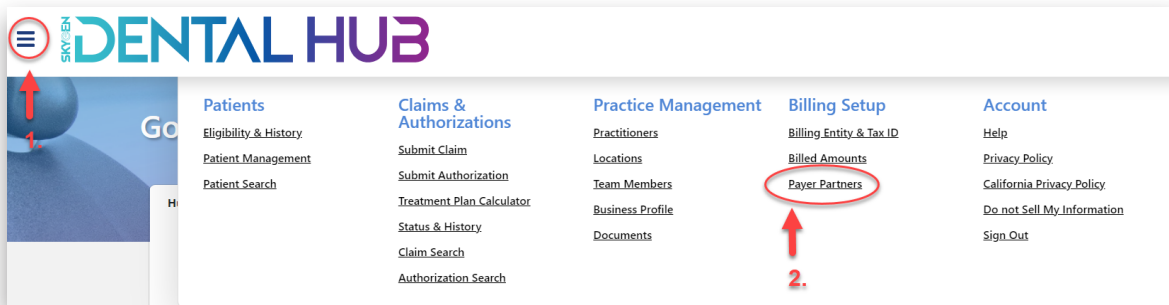
The screenshot shows a web interface for generating Primary Care Reports. At the top left, the word "Documents" is displayed in a blue header. A "Back" button is in the top right corner. On the left side, there is a sidebar titled "Select Document Type:" with the following options: "Remits", "Fee Schedules", "Authorization Schedules", "Primary Care Reports" (which is highlighted with a blue bar and a right-pointing arrow), and "Insurer Documents". The main content area is titled "Primary Care Reports" and contains two dropdown menus: "Treatment Location \*" and "Treating Dentist \*", both currently set to "All". Below these menus are two buttons: a blue "Generate" button with a dropdown arrow and a white "Clear" button.

### To find Primary Care Reports...

- Under the Main Menu, locate "Practice Management" menu
- Select "Documents"
- Select "Primary Care Reports"

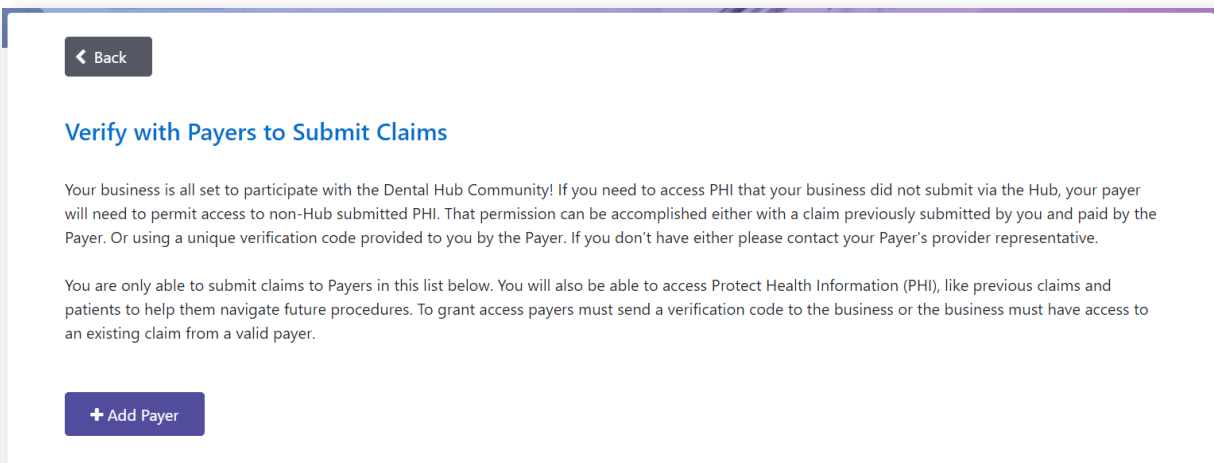
## ➤ Billing Setup Payer Partners

Add your Payer Partners here after you have already created your account on the Dental Hub.



### To find Payer Partners...

- Under the Main Menu, locate “Billing Setup” menu
- Select “Payer Partners”



You can verify the “trusted business” relationship through either: 1). Entering information from a claim the payer/insurer recently processed for your business or 2). Entering a registration code the payer/insurer provided to you directly.

## ➤ Continued Support

The Dental Hub conducts regular live webinars. *Pre-registration is not required.* Click on the link and check the dates. We invite you to join us any time, or as often as you'd like! Each webinar includes all the functions and features highlighted in this Quick Start Guide. An open discussion and Q&A conclude each session.

Webinar Link: <https://www.dentalhub.com/knowledge/webinar/free-monthly-webinar>

*If you have questions related to a patient's coverage or how any claim was processed or paid, you will need to call the patient's health plan directly to resolve those questions.*