CLIENT PORTAL GUIDE

Mitchell MCN

August 2019

REGISTER FOR THE PORTAL

Visit mcn.com to set up an account to use the portal.

- Under For Clients, select New Client Registration Form.
- Fill out the required fields and click **Submit**.
- You will receive an email with a link to the website, your login, and a password within two business days

 usually within a few hours.
- Access the Client Portal by clicking the Clients button on the top banner of any page on mcn.com or reach the portal directly at: https://service.mcn.com/ Client.



 Navigating to the portal will direct you to the login page.

TIP: Need manager login access? This feature allows designated managers to review cases for all related logins. Ask your Mitchell MCN representative for more information.

Note: We refer to a service request as a "referral."

ORDERING SERVICES

Once you've logged in, click the **Order a New Service** button in the upper right-hand corner.

+ Order a New Service

On the **Select Service** page choose the **Client Site** for the office ordering the service. Proceed to choosing the **Insurance Type** and **Jurisdiction**. Completing these fields will then allow you to select a **Service Product** and **Specialty**.



TIP: Click on **Not sure what Service Product to choose** to download a PDF about Mitchell MCN exams and reviews.

- Click Next to access the Main Information page and complete the applicable Claimant Information fields.
 Fields with an asterisk (*) must be completed to continue the referral process.
- Click Next to access the Additional Information page.
 - ☐ Click the **Add Cover Letter Questions** button to select existing questions.

Add Cover Letter Questions

 Add your own cover letter questions by clicking the Add Question button. You will have the opportunity to edit your selected cover letter questions after selecting Save Changes.



Click **Done** when finished selecting cover letter questions. When the cover letter window closes, a light blue notification will display the number of questions added.

ORDERING SERVICES

TIP: Contact Mitchell MCN to further customize the questions that display automatically. Questions are specific to insurance lines and products.

 Upload files by clicking browse or by dragging your file directly into the grey space provided.
 Once uploading has been completed, the name of your document will appear on a green bar.



- Click the Add Additional Services button to request additional exams or reviews.
 - Click on the red circle to the right of the Service Product and Specialty drop-down menus if you decide not to add additional services.
- Make Additional Requests such as obtaining an Interpreter, Diagnostic Testing, Transportation, or providing information on a related Plaintiff Attorney, Defense Attorney, Employer, or Treating Provider.
 - Related fields will appear for data entry when you select any of these check boxes.
 - Transportation requests default to ground/taxi service. For air travel or other related needs, contact your Mitchell MCN representative.
- Click the Back button to make changes to your referral before submitting.
 - Changes to the Select Service page of the order form will require using the Start Over option to ensure we obtain the required information from you based on any new Select Service page selections.
- □ Done with your referral? Click the **Submit** button.
 - Do not navigate away from this page until the Thank you for your order! message appears and confirms our receipt of your order.

TIP: To return to your dashboard, click on the MCN logo (top of the screen, left end of purple bar).

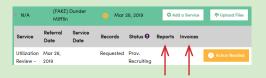
MAIN DASHBOARD

All services ordered from Mitchell MCN — whether placed through the portal or not — are displayed on your login's unique home page/dashboard.

- Search for referrals by Name or Claim #.
- Sort services by clicking the Claim, Name, or Referral Date column header or icon. Reverse the sort order by clicking the column header or icon again.
- Use the Show tabs to display services based on the following:
 - Action Needed Referrals in need of an action from you, the user. *See additional information about Action Needed items in the Service Details section of this guide.
 - Open Referrals with an open service (no completed report/no invoice).
 - Archived Referrals where billing is complete for all associated services.
 - Report Available Referrals with a finalized report available.
 - □ All All cases available.

TIP: Use the **Set as default view** to select a tab to display by default on the home page.

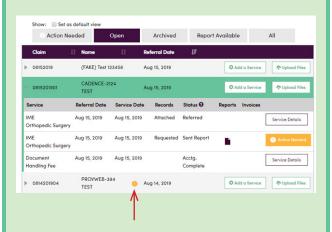
- Click Add a Service to add additional services to an existing case.
- If you have additional questions or records for a completed referral located on the Archived, Report Available, or All tabs please order an Addendum or Clarification by using the Add a Service button located on the right side of the claim line.
- Click Upload Files to add documents to an existing service. Wait for the green bar to appear before clicking the Close button within the Upload Files window.
- Download and view Reports and Invoices here:



SERVICE DETAILS

Click on a claim to expand and view all associated services.

 If a yellow exclamation point appears next to the Referral Date, this indicates further information is required for Mitchell MCN to move forward with this case. Click on the exclamation point to learn more. A status — such as Scheduled — will be displayed.



Click on the **Action Needed** or **Service Details** button to open the **Service Details** window to access detailed information about the service. If **Action Needed** is visible instead of **Service Details**, we need further information.

The **Service Details** window includes these features:

- MCN Files Download and view files uploaded by MCN.
- Your Uploads Upload files to a service or view files that you have already uploaded.
- Messages Send us a message through the Messages tab.
- **Cover Letter** Add/edit cover letter questions here.
 - Once a cover letter has been sent to the provider, the cover letter will be available here to download. No further changes to the cover letter questions will be possible. You will need to request an **Addendum** to add more questions.

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