

The New MSB Portal and CBS Navicert v7

The new MSB portal has a lot of interesting features. You can review the training material here:

<https://www.ehealthsask.ca/services/CustomerPortal/Pages/Training.aspx>

But the big takeaway is you won't be using the new MSB portal to send or pick up your claims. At least not directly. Navicert will handle everything for you behind the scenes. This will lead to a much simpler billing cycle. This document will cover the steps you will need to take and the changes you can expect. It's important that you read this entire document and follow each step so please read it carefully.

First Step: Update Navicert on or after Feb 1 2024.

The old MSB portal is going away on Feb 13, 2024. Our update will be released Feb 1 2024. You can update Navicert any time from **Feb 1, 2024** through **Feb 13 2024**.

This is a special update. You can only update to v7.1 by going directly to our web site (saskcbs.com) with your web browser and clicking on the button marked "New Portal Update" button.

Our web site is saskcbs.com

- Click New Portal Update (v7.01)
- run the program setup.exe.

Complete Billing Systems

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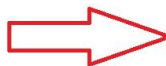
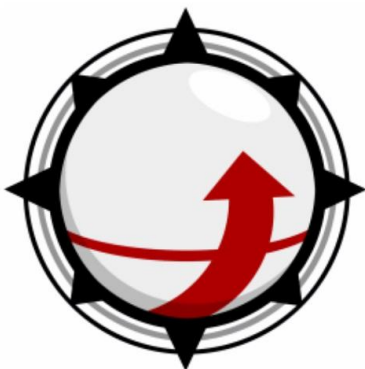
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Your Medical Office Software Specialists



New Portal Update (v7.01)

CBS Navicert New Portal Manual

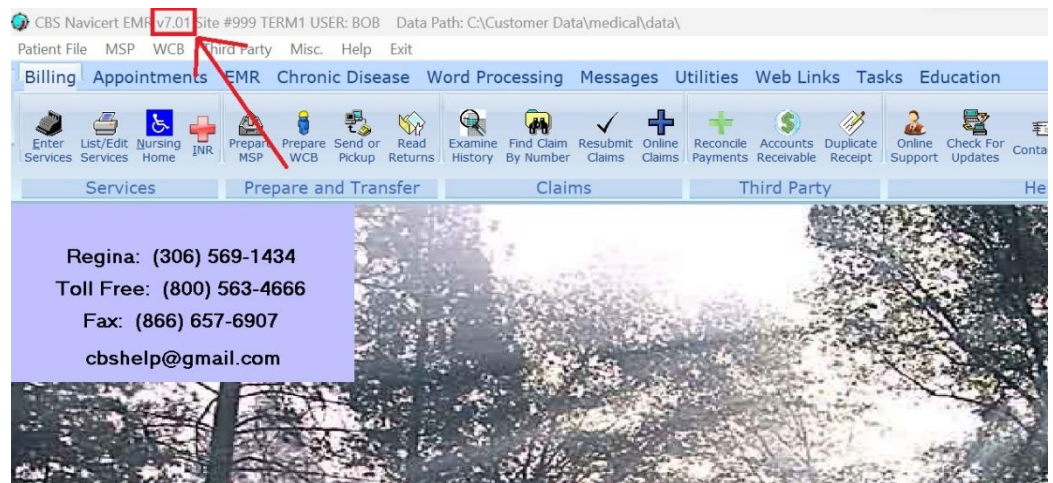
CBS Navicert

PC Support

Remember there's no rush. You can update any time before Feb 13 2024.

Note: You need admin permissions to install software on any computer. Some clinics, especially those inside the larger health districts, are locked down to prevent users from installing software. We can't give you admin permissions – If you don't have permissions, you will need to contact your IT department.

After a successful update your CBS Navicert version number will be 7.01 (or higher). The version number appears at the top of your Navicert program. If you have done an update and your version number is less than 7.01 please call us for assistance.



Making the Switch – Timing is Critical

Between now and Feb 13 2024 Gather your numbers and be ready.

You need 3 numbers. Clinic Number, Group User Key, Group Number

- **MSB will send a new clinic numbers to any doctor who has a 000 clinic number.**
 - If you have a 000 clinic number, on Feb 7 2024, MSB will send you a new clinic number
 - Do not enter this new clinic number yet – it won't work with the existing portal.
- **MSB will email every clinic a Group User Key on Feb 12 2024**
 - This is a brand new number you have never seen before.
 - It is 9 digits long
 - You will need this key to use the new portal
 - If you don't receive your new number by Feb 13, call MSB: 800-605-2965.
 - Don't call CBS – We don't have your group user key and we can't give it to you.
- **You already have your Group Number.** It won't change. You see it every time you sign into the current MSB web site and it's on all your validation reports. It is NOT the same thing as your clinic number. If you can't find it, call MSB. You will need it on the new portal.
- If you don't receive the numbers on the dates above – write to MSB or call them. Make sure you have all your numbers by Feb 13 2024.

DO NOT CALL CBS for these numbers

We Don't have them

CALL or Write to MSB if You Need These Numbers

- Contact MSB for these numbers.
- The MSB Email address is: msbclaimsinitiative@health.gov.sk.ca
- The MSB phone number is: 1-800-605-2965

Up to Feb 5 2024 - Clear out old Claims

On or before Feb 5 2024 – empty out your old billing claims by preparing a file and sending your claims to the old MSB portal. Use your old billing procedures.

You don't need to enter your Group Number or Group User Key yet – it's not needed for the old portal. But why wait? You might as well enter it now if you have the numbers.

You are now finished submitting claims to the old portal. You can continue entering claims into your system but **DO NOT PREPARE** a new file until the new portal opens up on Feb 13 2024.

Return File on the old portal:

You can pick up your return files from the old portal on the afternoon of Feb 7 2024 through Feb 12 2024. It's important to pick up these files by Feb 12 because Navicert will be switching to the new portal on Feb 13 2024.

Feb 13 2024 – If you have Clinic 000 – enter your new clinic Number.

Important notes:

- If your clinic number isn't 000 you can skip this page.
- Don't change your clinic number before Feb 13 2024.
- If you don't have your new clinic number, contact MSB to get your new clinic number.

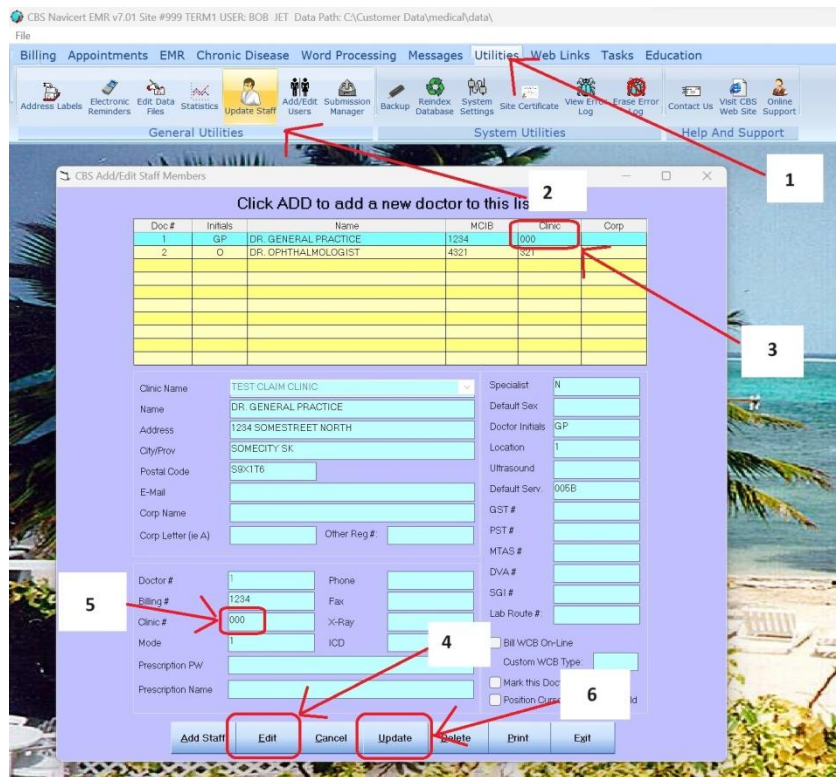
**PLEASE DO NOT CONTACT CBS FOR YOUR NEW CLINIC NUMBER
WE DON'T HAVE YOUR NEW NUMBER.**

If you have 000 as a clinic number you need to change it to use the new portal. You can't submit claims with your old 000 clinic number.

To change your clinic number:

(Follow the steps from 1 – 6 on the picture to the right in order)

- 1) Click Utilities
- 2) Click Update Staff
- 3) Find any doctors with clinic number 000 and highlight them by clicking on them
- 4) Click Edit
- 5) Change the Clinic Number to the new clinic number (Note: **Not before Feb 13 2024**)
- 6) Click Update
- 7) Repeat for each 000 doctor



Note: If your clinic number isn't 000 you don't need to change the number. This is only for doctors with 000 as a clinic number.

On Feb 13 2024 – The New portal goes live

Stick to your old schedule. You don't have to submit claims on the exact date of Feb 13. Nothing changes as to the date you send your claims or pick up your return files.

When it's time to submit your claims, you will **prepare your billings as you have always done** with one minor difference – you must enter your **Group Number** and your **Group User Key** in the spots circled in red below. The program will not work without these numbers. Remember **DO NOT CONTACT CBS** if you don't have these numbers. We don't have them. Please contact MSB to get these numbers.

- Enter your claims using Enter Services as you always have – nothing changes
- Use List/Edit Services to review and correct claims prior to preparing the claims – nothing changes
- Continue on with your old Send/Pickup dates – nothing changes
- Click on Prepare MSB when you are ready to make a file to send to MSB.
- Make sure the Group Number and Group User Key are entered – but other than that, nothing changes.

The screenshot shows the 'Prepare Billings' application window. The interface includes a sidebar with icons for 'Summary Reports', 'Printer', 'Advanced', and 'Prepare'. The main area contains several input fields: 'Working On:', 'Patient:', 'Status:', 'Provider:' (set to 'All Providers'), 'Group Number:', and 'Group User Key:'. The 'Group Number' and 'Group User Key' fields are circled in red. Below these fields is a 'Submission Sort Order' section with radio buttons for 'Alphabetically' (selected), 'Date of Service', and 'Order of Entry'. A message states: 'After you run this procedure it is a good idea to reindex your database'. At the bottom, there are buttons for 'Select Date Ranges', 'Prepare Billings', and 'Exit'. The 'Printer' section has options for 'Report by Paying Agent', 'Report by Location', 'Anaesthetic Report', 'Windows Default', and 'Select Printer'.

New Portal In Action

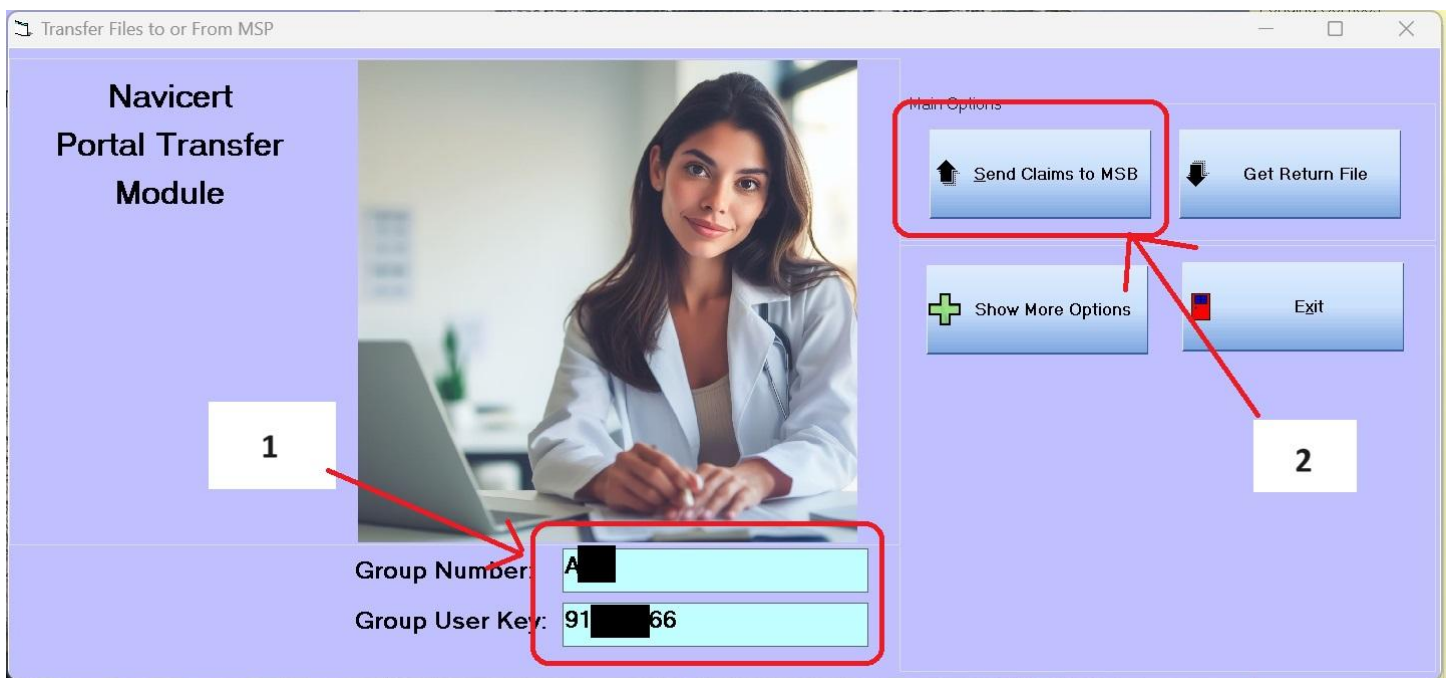
Sending Claims – Page 2 of 4

Now you will see some changes – relax – it's simple. The new portal is in operation behind the scenes but Navicert handles everything for you so you don't need to worry about it.

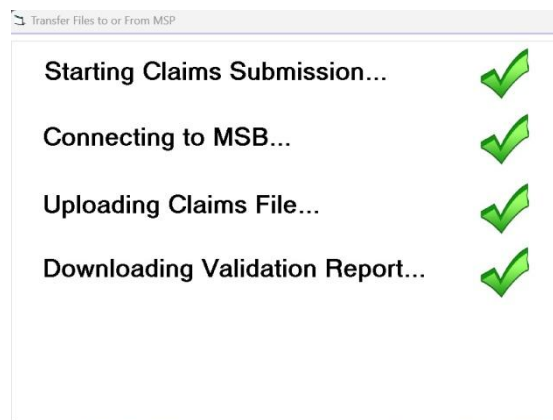
After preparing your file you will see our new Navicert Portal Transfer Module. Don't panic. It's easy to use.

There are just two buttons you will need most of the time – “Send Claims to MSB” and “Get Return Files”

- 1) **Make sure your Group Number and Group User Key are entered in the red circled area below**
- 2) **Click Send Claims to MSB**



Navicert will now handle the submission process and you will see the progress on the screen.



Check your Validation Report!

Sending Claims – Page 3 of 4

If all goes well you will see your validation report appear on the screen.

- Check your validation report carefully.
 - If any one doctor is rejected, the entire submission for all doctors will be rejected.
- Make sure to print a copy for your records.
- If you see a problem or a rejected doctor you must deal with it right away.
- Please call us for assistance if you see a rejection on this report

Claims Submission Validation Report

File Name : [REDACTED]20240105111353.txt
Submission Date : Fri Jan 05 12:14:25 CST 2024
Group Number : [REDACTED]
Status : Accepted

Clinic	Doctor	Corporation Indicator	Claims	Records	Services	89 Recs	Comments	Fee Sub
[REDACTED]	[REDACTED]	A	1	5	2	1	0	\$74.70
Totals:			1	5	2	1	0	\$74.70

The screenshot shows a PDF Filler window with a toolbar on the right containing buttons for Zoom In, Zoom Out, Print, and Exit. The report content is displayed within a frame.

Note: This is a big change. Previously if you submitted claims for 10 doctors and one doctor was rejected because you had an invalid billing number (as an example), the other 9 doctors would go through just fine. Not anymore. If ANY doctor in the submission is rejected then ALL doctors fail. You must fix the rejected doctor(s) and resubmit the entire batch. If you can't fix the one rejected doctor you must still resubmit the rest of the doctors separately.

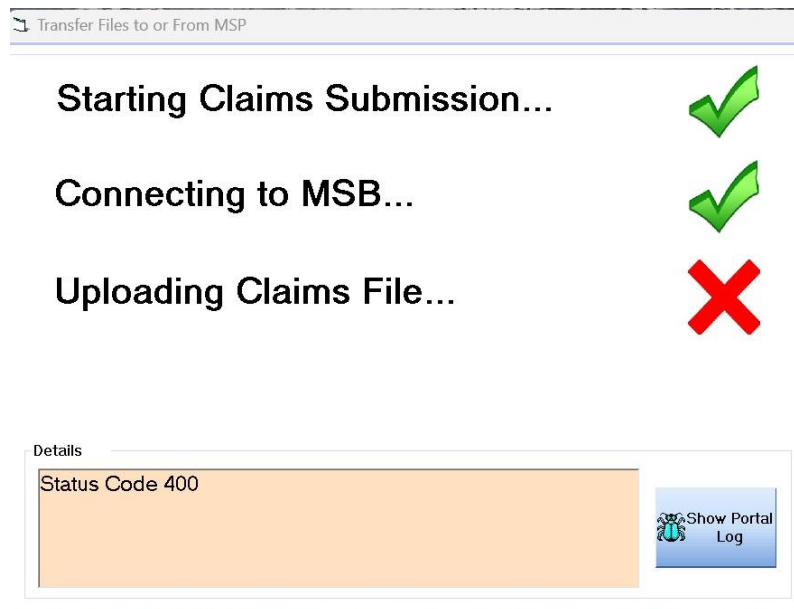
Call us if you see a rejection on your validation report.

If you see a big red X – You have a problem

Sending Claims – Page 4 of 4

If there is a problem you will see a red X appear. Wait a few min and try the SEND button again. If your submission won't go through please call us for assistance.

This could be a busy time for us so please be prepared to leave a message with a direct contact number like a cell number or back office number so we can get right through to you. I'm sorry but we just can't wait on hold or go through an answering service. **If you can't leave a direct contact number please feel free to call back later.**

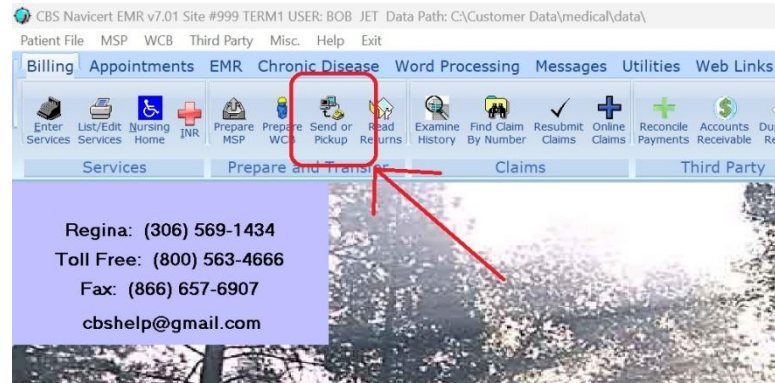


I know it seems way too simple but honestly that's it. Prepare your File, hit the Send Claims button, print your validation report. Done. Easy as that.

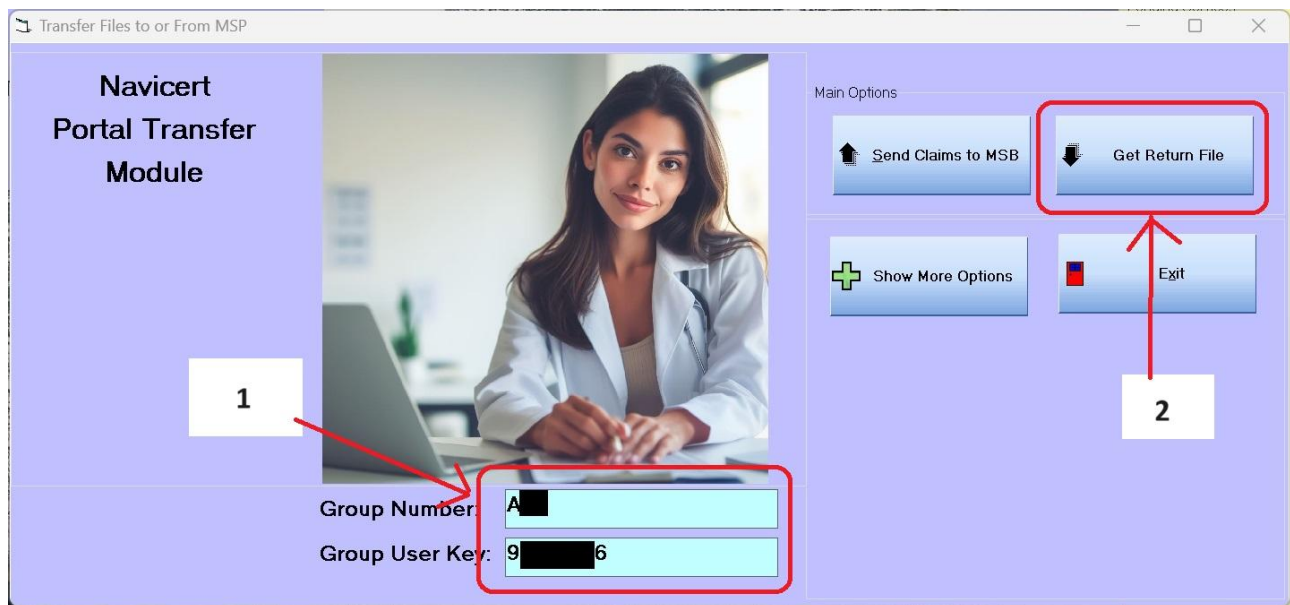
Picking Up Your Return File

Don't change your schedule. Pick up your return file on your regular date.

- Click Send or Pickup



You will see our new Navicert Portal Transfer Module.

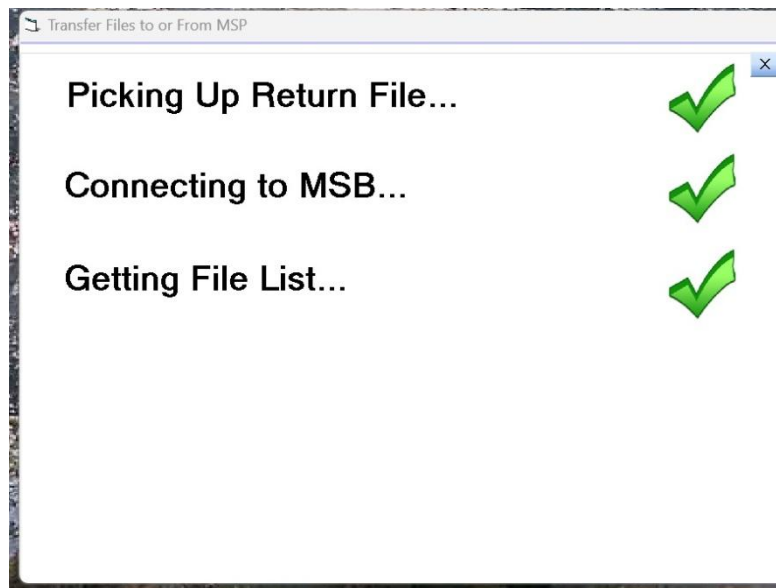


- 1) Make sure your Group Number and Group User Key are filled in

Note: We don't have these numbers. Please don't call us asking for them.
If you don't have them you need to contact MSB to get your numbers.

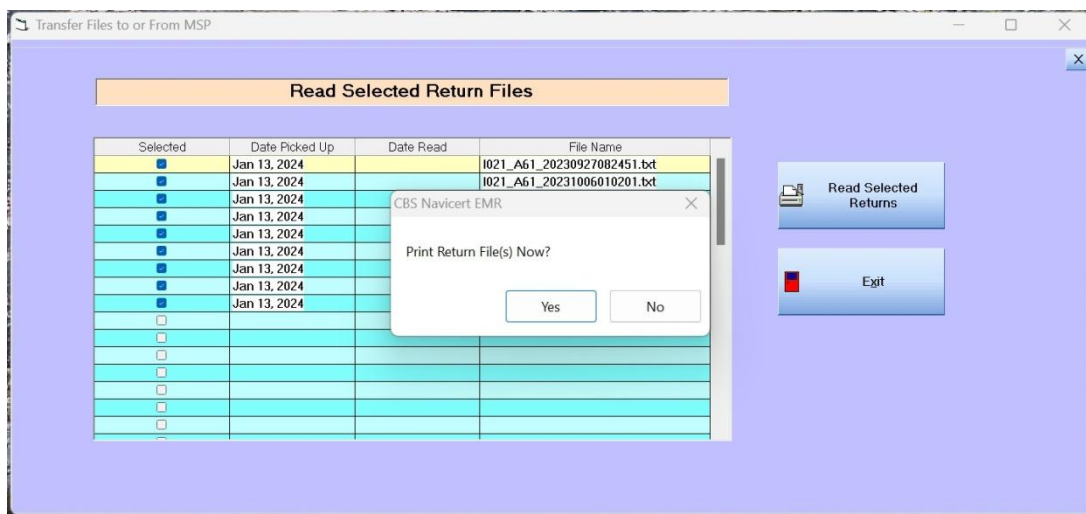
- 2) Click Pick Up Returns

As your return file comes in, you will see each step being completed. If you encounter a Big Red X, a problem was encountered. You can wait a few minutes and try again. If you still can't get your return file please call for help.



Navicert will download a list of all available return files and put them on a grid. Usually there will just be one but if you have missed some return files they will all show up. Once the list is on the grid you can print your return files out by clicking YES.

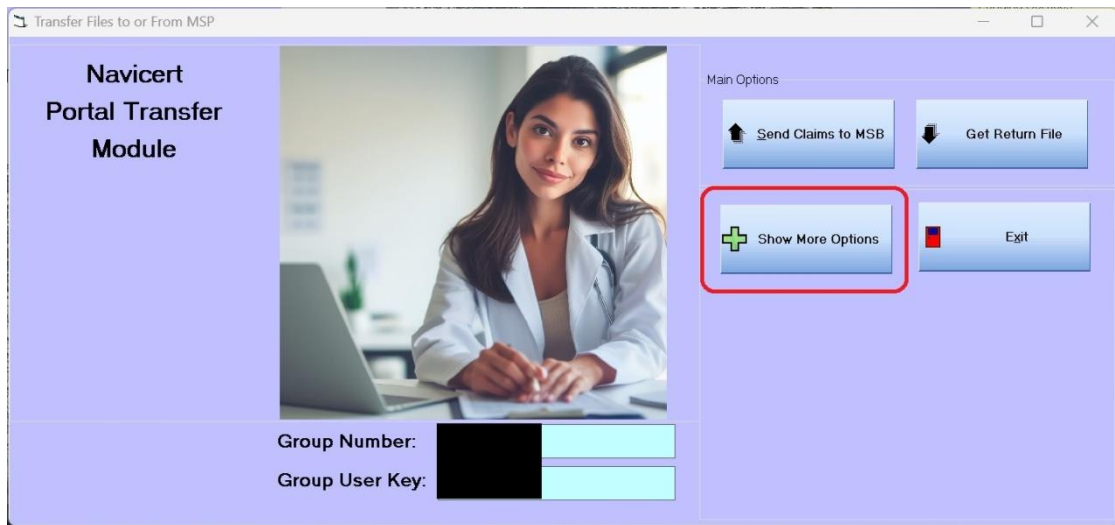
If for some reason you don't want to print them all out you can click NO and come back to the list later or you can pick individual files to print. You can also re-print return files that have already been printed.



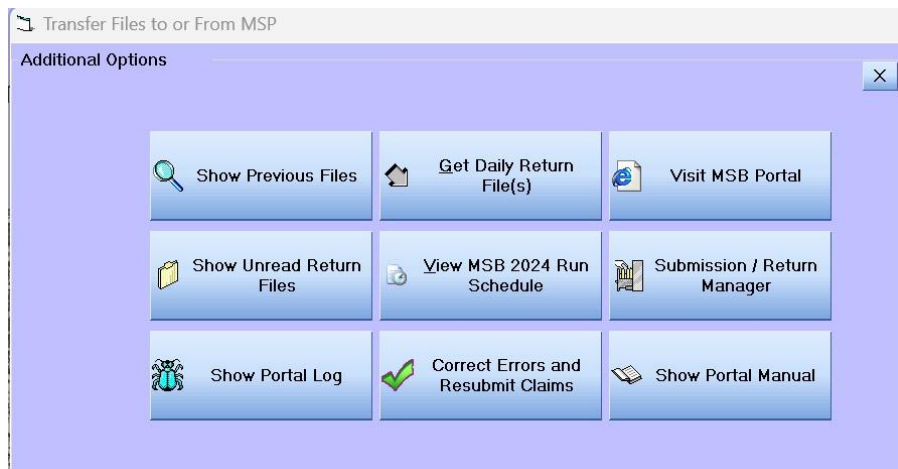
I know it seems a bit too easy but that's all there is to picking up your return files.

Other Options

To avoid clutter on the screen, there are a number of other options that do not appear until you press the Other Options button.



These Options will appear:



Show Previous Files

Shows previous Submission and Return files, dates and if you double click the submission it will show the validation report for that submission

Show Unread Return Files

Shows any unread Return files. You can select any of these files and reprint them.

Show Portal Log

Shows the Portal Log showing detailed and technical session data to help debug any transfer problems.

Get Daily Returns

MSB has interim return files that are made available between full return files. This function will get that list and allow you to print them if you wish.

View MSB Run Schedule

Downloads and shows the run schedule

Correct Errors

Shows errors and allows you to resubmit individual claims

Visit MSB Portal

Opens the new MSB On-Line Portal.

Submission/Return Manager

Shows previous submissions and returns allowing you to reprint older return files and resubmit previous submission files.

Show Portal Manual

Downloads and displays this manual.

Final notes:

There are a lot more things we can cover but for now you have your hands full with these changes.

This is going to be the biggest change to the program since we switched from DOS to Windows in 1999. Hopefully this change goes smoothly both on our side and for MSB.

As always, we are here to help. We could be swamped with calls during the switch-over so your patience is much appreciated. If your call is of a non-urgent nature please hold off during this busy switch-over time.

If you do need to call, please be prepared to leave a direct callback number with our answering service like a cell phone or back office number. We won't be able to return your call if we get stuck at a switchboard or answering service. **If you can't leave a direct number please call back later.**

If MSB has a problem, they have a contingency plan. Hopefully we don't need to find out what that plan is.

I'm sure everything will go smoothly. Wish us all luck. See you on the other side.