

CertifyOS Provider Portal User Guide - Practitioners

Welcome to the comprehensive, step-by-step onboarding and operational manual for the CertifyOS Provider Portal. This document is designed to guide healthcare practitioners through the complete lifecycle of portal usage—from initial sign-up and dashboard navigation to application submittal, support routing, and profile settings maintenance.

Chapter 0: Initial Sign-Up & Account Creation

Step 1: Submit Your Invited Email

1. Navigate to the initial [Sign-Up Page](#).
2. Type your primary professional email address into the **Enter email** field.
 - *Note: This must be the exact email address where you received your initial onboarding invite.*
3. Click the yellow **Next** button.

The screenshot displays the CertifyOS Provider Portal interface. On the left, the header includes the CertifyOS logo and the text 'Provider Portal'. Below this, a message states: 'Join thousands of healthcare providers who trust Certify for their credentialing and enrollment needs'. Three features are listed: 'Fast Processing', 'Expert Support', and 'Real-time Status'. On the right, a 'Sign up' modal is open. It contains the text 'Please enter your email to get started' above an 'Enter email' input field with a red eye icon. Below the input field, it says 'After submitting your email id you will receive a link to create your account on Certify Provider Portal'. At the bottom of the modal are two buttons: a yellow 'Next' button and a 'Cancel' link. The footer of the page shows '© Copyright 2026 CertifyOS' on the left and 'Privacy Policy' and 'Terms of Service' on the right.

Sign up

Please enter your email to get started

Enter email

After submitting your email id you will receive a link to create your account on Certify Provider Portal

Next

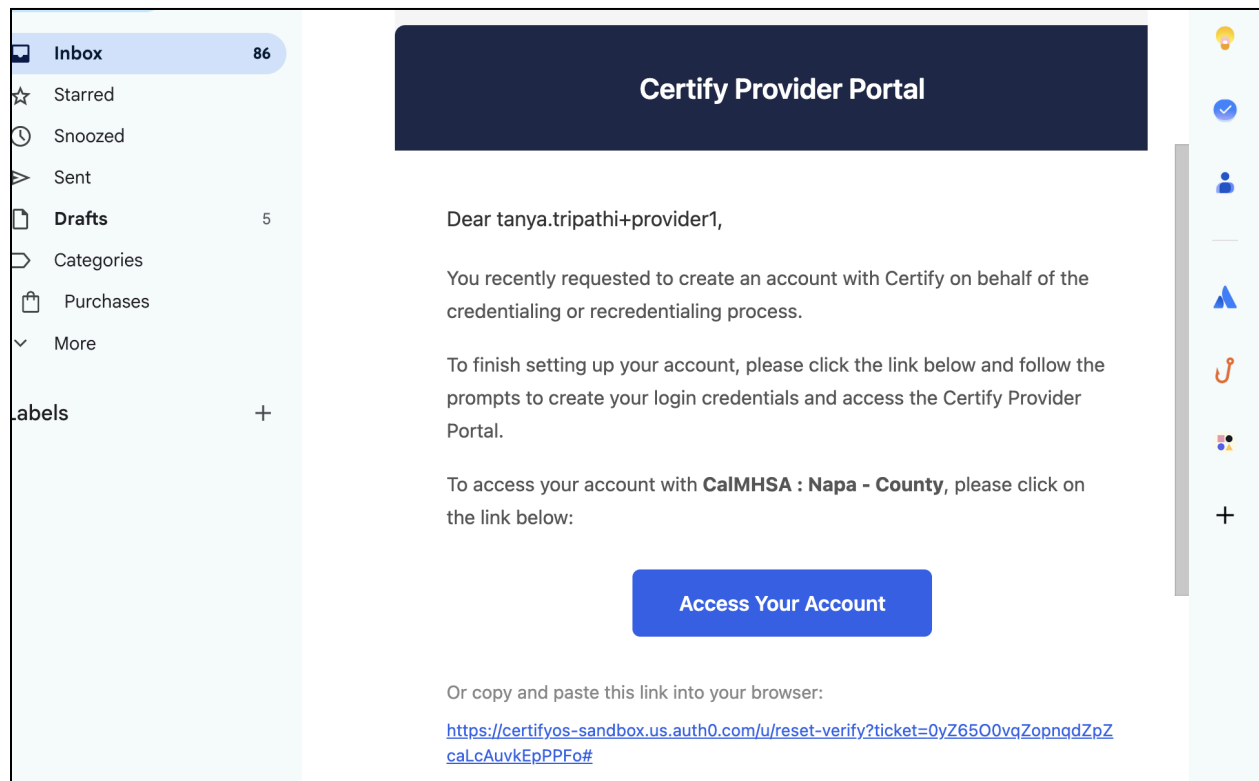
Cancel

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Step 2: Open Your Verification Email

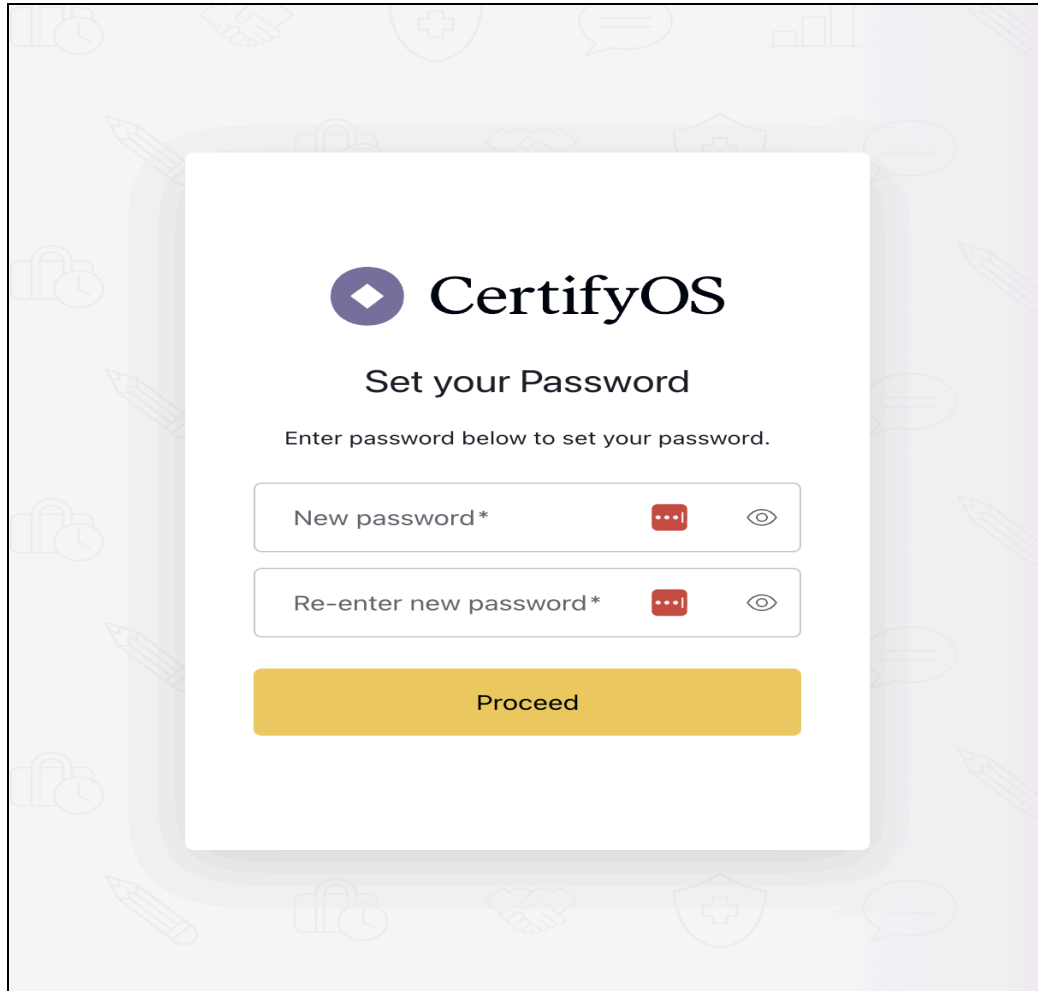
1. Open your email inbox and look for an email with the subject line: "**Complete Your Certify Provider Portal Account Setup**".



Step 3: Create Your Master Password

Clicking the email link will automatically open the secure your password interface.

1. Click into the **New password*** field and type your chosen secure password.
2. Type the exact same password into the **Re-enter new password*** field to verify it.
3. Click the yellow **Proceed** button to finalize your registration.



Chapter 1: The Dashboard

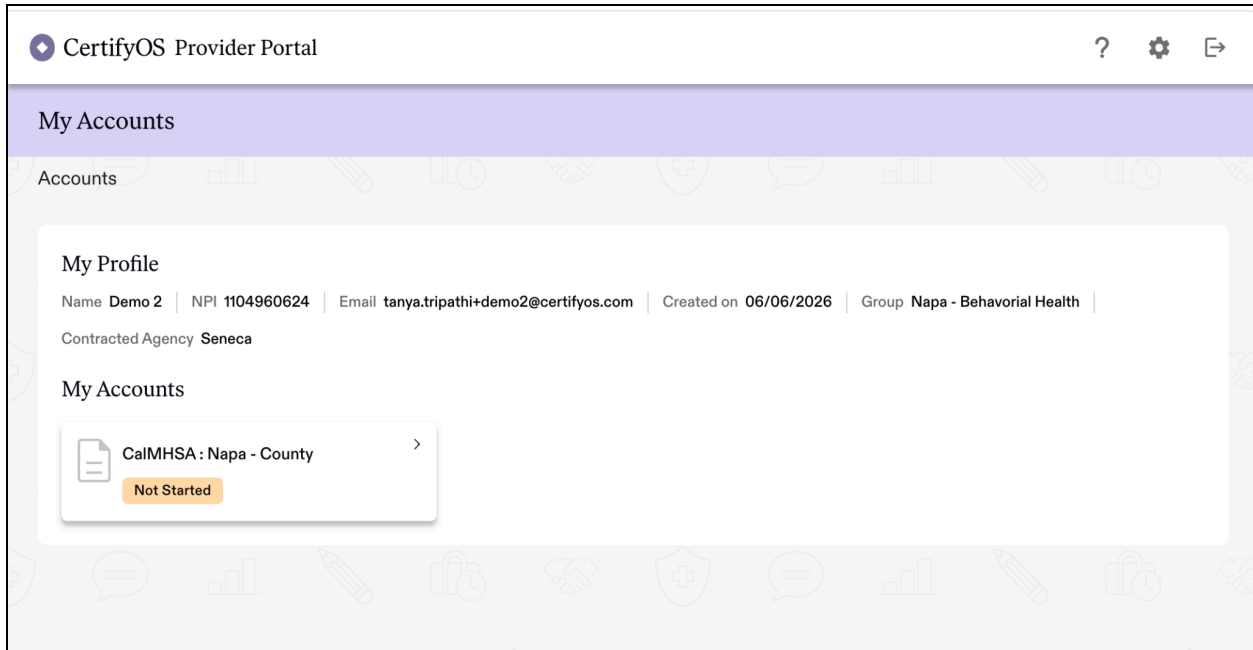
Upon a successful initial login sequence, users land directly on the **My Accounts** dashboard. Your dashboard is split into three main areas:

1. My Profile

This section acts as your professional ID card within the system. It displays your baseline data:

Your Details: Name, NPI, email address.

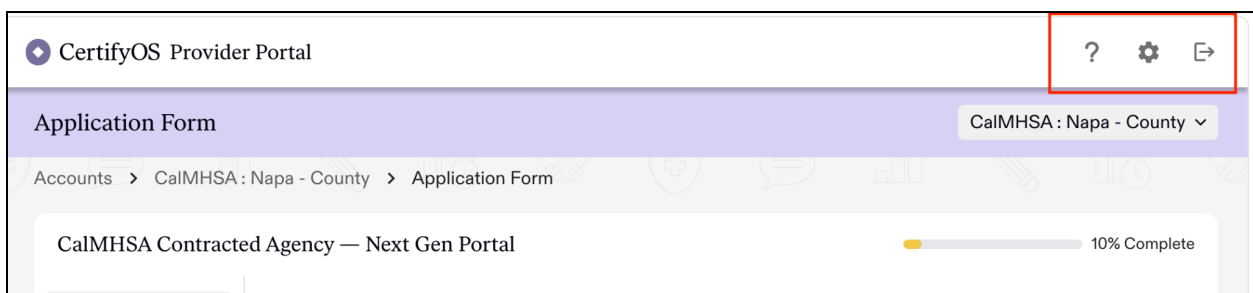
Affiliations: It shows you the group you are tied to and your contracted agency if applicable.



2. My Accounts

This is where all your active county credentialing applications live. Right now, you have one primary card: **CalMHSA : Napa - County**. The badge currently reads Not Started, meaning it's a fresh application waiting for your input. This status can change based on your activity and will show as draft for an incomplete application.

3. The Top Navigation Bar



- **Help (?)**: Click this if you run into technical snags or need portal support.
- **Settings (Gear Icon)**: The Gear (Settings) Icon located in the upper-right corner of the top navigation bar allows you to quickly view, manage, and update your personal account

information without leaving your current page. From here, you can quickly update your details, toggle between practitioner or admin roles, or reset your password.

nts

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o 2 | NPI 1104960624 | Email ta | Group Napa - Behavioral Health |

Agency Seneca

ounts

alMHSA : Napa - County

Not Started

User Profile

First Name
Demo

Last Name
2

Email
tanya.tripathi+demo2@certifyos.com

Role
—

[Edit Profile](#)

Change Password [>](#)

[Close](#)

Edit Profile

First Name
Demo

Last Name
2

Email
tanya.tripathi+demo2@certifyos.com

Practitioner ☐ Provider Admin ☒

Close Save

Logout (Exit Icon): Safely sign out of your session when you're done.

Chapter 2: Navigating Your Application Status

Clicking on any application track from your dashboard (such as CalMHSA : Napa - County) takes you directly to your status dashboard. This page acts as your central workspace for tracking and completing your specific credentialing requirements.

Track Your Progress

The Forms section on the left helps you monitor your paperwork status at a glance:

- **Open Forms:** Displays forms you have already started but haven't finished yet.
- **Submitted Forms:** Tracks forms you have successfully completed and turned in.

The screenshot displays the CertifyOS Provider Portal interface. At the top, the header includes the CertifyOS logo, the text 'CertifyOS Provider Portal', and navigation icons for help, settings, and a share link. Below the header, a purple bar labeled 'My Status' contains a dropdown menu set to 'CalMHSA : Napa - County'. Underneath, a breadcrumb trail shows 'Accounts > CalMHSA : Napa - County'. The main content area is divided into two sections. The left section, titled 'Profile', lists user details: Name 'Demo 2', NPI '1104960624', Email 'tanya.tripathi+demo2@certifyos.com', Created on '06/06/2026', Group 'Napa - Behavioral Health', and Contracted Agency 'Seneca'. Below this is a 'Forms' section with expandable/collapsible options for 'Open forms (0)' and 'Submitted forms (0)'. A message at the bottom of this section states: 'Presently there are no active forms for this profile, please select the relevant available form(s) to proceed'. The right section, titled 'Available Forms', features a button labeled 'Credentiaing Intake' with a document icon.

Launch an Available Form

To begin inputting your credentialing data:

Locate the available Credentialing intake form on the right side of the screen under available forms. The digital form will open immediately, allowing you to fill out your details and upload any required documentation.

Chapter 3: Starting Your Credentialing Application

After selecting an assigned application from your dashboard, you will be taken to the Application Overview page (for example, the CalMHSA Practitioner Credentialing form). This page provides a final checklist to help you prepare before completing the application.

The form landing page serves as a final checklist before you begin with the application:

- **Progress Bar:** When starting a fresh form, this will show as 0% Complete. As you fill out and save sections in order, this bar will automatically update.
- **Application Information:** Review the instructions or documents requirements displayed on the page before proceeding.
- **Next Step:** Click Start Application to begin, or Close to return to the dashboard.

The screenshot shows the 'CertifyOS Provider Portal' interface. At the top, there's a header with the portal name and navigation icons. Below this is a purple 'Application Form' banner with a dropdown menu set to 'CalMHSA : Napa - County'. A breadcrumb trail shows 'Accounts > CalMHSA : Napa - County > Application Form'. The main content area is titled 'CalMHSA Practitioner Credentialing' and features a progress bar at 0% Complete. The text instructs users to complete sections in order, matching official workbook groupings. It lists four sections: 1. California county / division, 2. NPI and identity documents, 3. Education and licensure, and 4. PDF documents. At the bottom, there are 'Close' and 'Start Application' buttons.

CertifyOS Provider Portal

Application Form

CalMHSA : Napa - County

Accounts > CalMHSA : Napa - County > Application Form

CalMHSA Practitioner Credentialing

0% Complete

Welcome. Complete each section in order. Section titles match the official workbook groupings.

CALMHSA PRACTITIONER CREDENTIALING

All document uploads must be PDF format, maximum 15 MB per file. Encrypted or password-protected PDFs are not accepted.

Before you begin:

1. California county / division
Know where you are applying to practice.
2. NPI and identity documents
Type 1 NPI from npiregistry.cms.hhs.gov; legal name as on ID.
3. Education and licensure
School dates; state license or alternate registration path.
4. PDF documents
License copies, resume, BBS proof, board certificates, liability insurance — PDF only, 15 MB each.

Close

Start Application

Chapter 4: Navigating the Credentialing Application

Tracking Your Progress

- **Progress Bar:** Located in the top right corner, this shows your overall completion percentage (e.g., 10% Complete).
- **Section Sidebar:** Lists all parts of the application (e.g., *Practitioner Details*, *Degree Details*, *Work History*).
 - **Green Checkmark:** The section is complete.
 - **Red Exclamation Mark:** The current section you are working on, or a section that contains errors/missing fields.
 - **Greyed Out:** Locked sections that will open as you hit next.

Application Form CalMHSA : Napa - County ▾

Accounts > CalMHSA : Napa - County > Application Form

CalMHSA Contracted Agency — Next Gen Portal 10% Complete

Additional Practitioner Details

2.1 Home address — line 1 *
Required for verification via the National Practitioner Data Bank.
Enter Text.. ***
This field is required

2.2 Home address — line 2
Enter Text..

2.3 City * **2.4 State *** **2.5 ZIP code ***

Enter Text.. This field is required This field is required This field is required

2.6 What is your ethnicity?
The organization does not discriminate or base credentialing decisions on an applicant's race, ethnicity or language, and providing the information is optional.

Close Previous Next

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Required Fields (*): Fields marked with a red asterisk and a "This field is required" message must be filled out to move forward.

Use the control buttons at the bottom of the screen to move through the application:

- **Next:** Validates your inputs and advances you to the next section.
- **Previous:** Moves you back one section to review or edit your answers.
- **Close:** Exits the application form and safely saves your current progress so you can finish it later.

If you click Close at any point while filling out a form, the portal automatically saves your progress. You will be returned to your My Status workspace, where you can easily manage and resume your incomplete paperwork.

You have two action buttons on your draft:

- ➔ **Resume Application (Icon**

→ **Delete Draft (Trash Icon 🗑️):** Click this button if you need to completely discard your application.

My Status CalMHSA : Napa - County

Accounts > CalMHSA : Napa - County

Profile

Name **Demo 2** | NPI **1104960624** | Email **tanya.tripathi+demo2@certifyos.com** | Created on **06/06/2026** | Group **Napa - Behavioral Health** | Contracted Agency **Seneca**

Forms

Open forms (1)

Credentialing Intake
Complete the form to initiate your credentialing process

Draft

App ID: 54A9E12C | Created On: 06/06/2026

Submitted forms (0)

Available Forms

Credentialing Intake

Chapter 5: The Attestation & Submission Page

The Attestation section is the final component of your application form. This is where you legally verify your identity and sign off on the provided information before submission.

Signature Options

The portal provides two convenient methods to sign your application digitally:

- **Option 1: Draw Your Signature** Use your mouse, trackpad, or digital pen to draw your signature directly inside the dotted box.
- **Option 2: Upload an Image or PDF** If you have a digital file of your signature, click the gold Upload signature button. The portal accepts image or PDF formats up to 15 MB.

Application Form

CalMHSA : Napa - County

Accounts > CalMHSA : Napa - County > Application Form

CalMHSA Contracted Agency — Next Gen Portal

10% Complete

! Degree Details >

! License and Certification >

! DEA and Board Certification >

! Hospital Privileges >

! Additional Documents >

! Work History >

! Disclaimer Questions >

✓ Attestation >

Attestation

10.1 Name *
Enter Text..

10.2 Date *
MM/DD/YYYY

10.3 Signature *
Option 1 :
Sign using trackpad or mouse in the box

Clear Signature

Option 2 :
Upload your signature as an image or PDF

Image or PDF up to 15 MB

Close

All changes saved

Previous

Review & Submit

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Finalizing Your Application

- **Review & Submit:** Once this section is complete and all sidebar categories display a green checkmark, click the Review & Submit button in the bottom right corner to finalize and submit your application.
 - **Previous:** Click this to return to the previous sections to review your answers.
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