

# Partnership HealthPlan of California



## Online Services User Guide *with eAdmin Manual*



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## Introductory Information

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This *PHC Online Services User Guide with eAdmin Manual* supports the July 2015 version of Partnership HealthPlan of California's Online Services for these modules:

- User Management
- eEligibility, including Batch Eligibility Verification
- Monthly eEligibility Download
- Capitation Reports
- Patients in Acute Hospitals

In response to provider requests, this new version of PHC ONLINE SERVICES provides significant improvements, including increased stability, functionality and speed; quicker updates; and linkage of sites by Tax ID Number (TIN)—all designed to increased provider satisfaction.

This newest version of PHC ONLINE SERVICES is available at <https://provider.partnershiphp.org>.

### Audience

This document combines the *PHC Online Services User Guide* with an *eAdmin Manual*, to provide eAdministrators with a single document of instructions on both administrative features and user features.

### System Requirements

PHC ONLINE SERVICES can now be accessed and operated in these browsers:

- Google Chrome
- Mozilla Firefox
- Internet Explorer
- Apple Safari

### Questions or Problems?

Partnership HealthPlan of California is available to help you with PHC ONLINE SERVICES from 8 a.m. to 5 p.m. Pacific time, Monday through Friday. You can reach us at:

- 707-863-4100
- [eSystemsSupport@partnershiphp.org](mailto:eSystemsSupport@partnershiphp.org)

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## eAdmin Manual

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The **eAdmin Manual** for PHC ONLINE SERVICES begins on the next page. It provides information to eAdministrators on:

- Creating their eAdmin account.
- Creating User accounts for people within their organization.
- Viewing the profiles of their organization's providers.

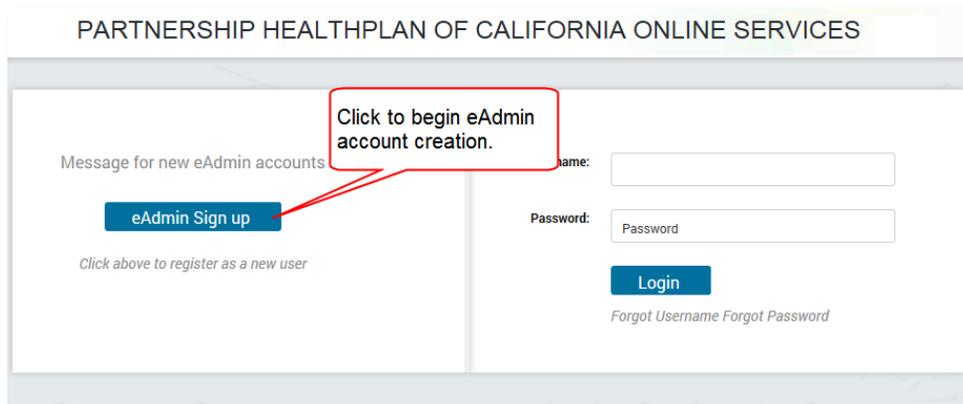
The **User Guide** for PHC ONLINE SERVICES begins on page 8. It provides information on using the non-administrative modules of PHC ONLINE SERVICES. It is the same *User Guide* provided to Users who are not eAdmins.

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## Creating an eAdmin Account

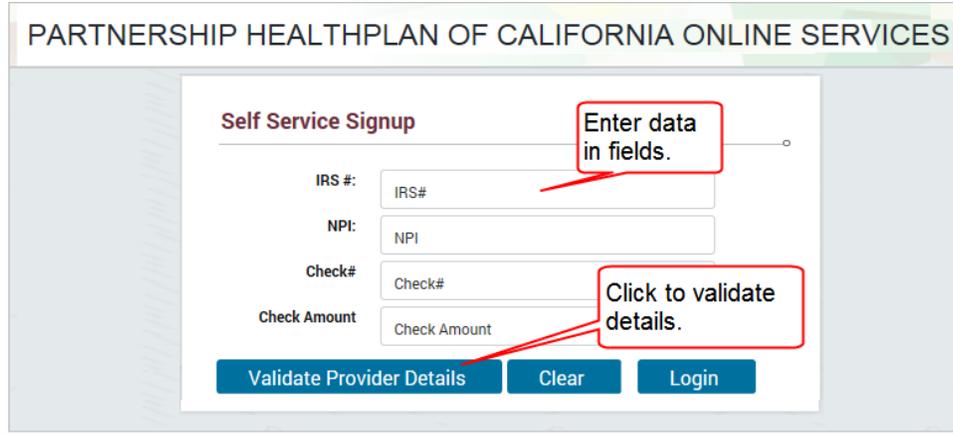
This section explains how to create an eAdmin Account, using Self Service Signup.

1. Go to <https://provider.partnershiphp.org>.
2. Click the **eAdmin Sign up** button.



**Figure 1. Launching Signup**

3. On the Self Service Signup screen, fill out the fields.



**Figure 2. Self-Service Signup**

TIN or IRS Number	Enter numbers only; no hyphens or spaces.
NPI	Enter numbers only; no hyphens or spaces.
Check Number	Enter either entire check number or the last 6 digits of check number.
Check amount	Enter full amount, but without \$ symbol or comma. For example, 1234.56 not \$1,234.56, or 99.09 not \$99.09.

4. Click the **Validate Provider Details** button.

The New User Registration page will open. Read *Registering as a New eAdmin*, which begins on page 3, for instructions on filling out the page.

**About Check Number and Amount**

- The check should be a claims payment check (not a capitation, ACA, QIP or other check), which was written from PHC to your organization.
- The check should be no more than 3 months old.
- The check information must match the IRS or TIN number, and NPI.

**About NPI Numbers:** Enter one NPI, even if you have multiple NPI numbers under your IRS number. All the NPIs associated to that IRS number will be linked into your PHC ONLINE SERVICES account.

**About IRS Numbers (Tax ID number):** You need to set up an eAdmin account for every IRS number.

## Registering as a New eAdmin

The **New User Registration** page opens when you have completed the initial phase of Self Service Signup (see page 1).

**How many eAdministrators should your organization have?** You must have at least one eAdmin. Although you can have more, beware of creating too many. It might be helpful to have one each at the organizational or regional level. However, having one at every location can lead to inconsistent assignment of privileges to Users.

### Complete the New User Registration page

Enter the appropriate information in the fields on the page.

1. When entering the email address, keep in mind:
  - The email should be the eAdmin’s work email, not a personal email.
  - An email address can be used only once to create an account within PHC ONLINE SERVICES. No other eAdmin or User account can be associated with that same email address.
    - If you want an employee to be the eAdmin for *one* organization, but for *more than one* TIN or IRS code, he or she will need to use different email addresses for each eAdmin account.
2. Check the box at **Change password after login** if you want the new eAdmin to change the password after the account is created. (This is useful if you are creating an eAdmin account for another person, who will later want to change his or her password.)
3. Read and check *each* box in the eAdmin Roles and Responsibilities section of the page. *If any statement is not true for your role or responsibility within your organization, you should not become an eAdministrator.*

**eAdmin Roles and Responsibilities:**

- I am responsible for creating accounts for this organization
- I am responsible for managing permissions of users for various online services applications (includes granting and revoking)
- I am responsible for auditing user accounts periodically
- I am a primary point of contact for PHC online services
- I am responsible for coordination of online services for this organization
- I am responsible for ensuring that individuals of this organization only have permissions that are in accordance with the HIPPA minimum use standards set forth in 45 CFR 164.502(b) and 164.514(d)

Figure 3. New User Registration Attestation

4. Click the **Create User** button.

After you click **Create User**, a message will be sent to the email address you provided on the registration form. The email provides a link with which you activate your eAdmin account.

### **Activate Your eAdmin Account**

After you click **Create User** on the New User Registration page, you will receive an email message to verify your email address and finalize activation of your eAdmin account.

1. Click the link in the email. The link will take you to either:
  - The Login page

**or**

  - The Change Password page, if the **Change password after login** option was checked on the New User Registration page. After you change your password, you will be able to access the Login page.
2. Login using your Username and Password.

You can now work in the modules and manage other users in your organization.

## Viewing Provider Profiles

Once you log in, the Home page opens. You can return to this page anytime by clicking the Home link in the left-side navigation section (explained at *Navigate the Pages*, on page 15).

- At the top right of the page you will see your name.
- To the left of your name, you will see the name of the organization for which you are logging in.
- Below your name, you'll see the details for the eAdministrators within your organization (which will include you.)

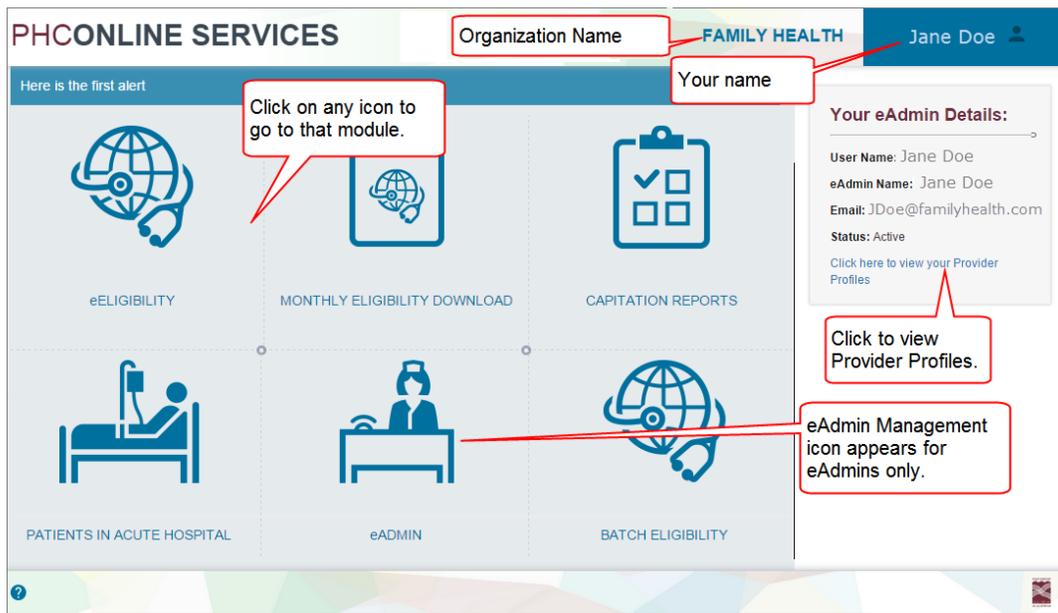


Figure 4. Home Page

Click the link to *Provider Profiles* to view a page with information about your providers.

**View Provider Profiles** 

Provider Name	Provider Address	User NPI	IRS#/ TAX ID	PHC Provider #	Provider Type	payee #
FAMILY HEALTH	101 NORTH ST ACACIA CA 96543	123456	000000000	200200201		P 13
FAMILY HEALTH	101 NORTH ST ACACIA CA 96543	123456	000000000	200200202		P 13
FAMILY HEALTH	101 NORTH ST ACACIA CA 96543	123456	000000000	200200203		P 13

Figure 5. View Providers

You can click the **Print** icon at the top right to print a copy of the provider list.

## Using the eAdmin Management Module

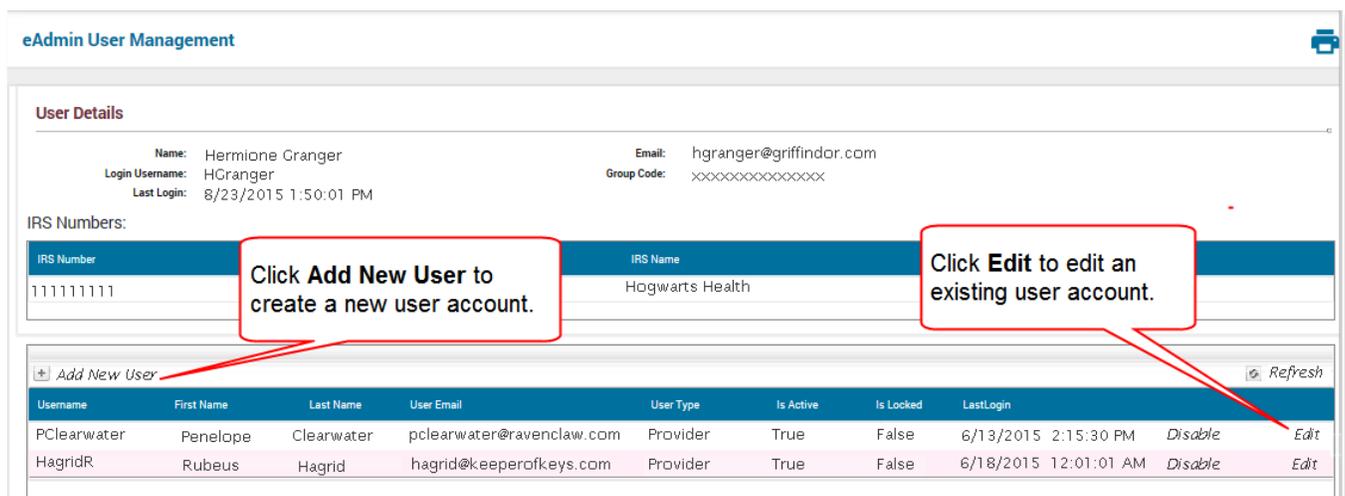
The eAdmin Management module allows eAdministrators to:

- View Users in Your Organization
- Add a New User
- Edit a User

Access the eAdmin Management page from either the Home page or the left-side navigation section (explained at *Navigate the Pages*, on page 15).

### View Users in Your Organization

Opening the eAdmin module brings up the User Management page, with a list of the people within your organization who have permission to be Users of PHC ONLINE SERVICES.



**eAdmin User Management**

**User Details**

Name: Hermione Granger      Email: hgranger@griffindor.com  
Login Username: HGGranger      Group Code: xxxxxxxxxxxxxxxx  
Last Login: 8/23/2015 1:50:01 PM

IRS Numbers:

IRS Number	IRS Name
111111111	Hogwarts Health

[Add New User](#)      [Refresh](#)

Username	First Name	Last Name	User Email	User Type	Is Active	Is Locked	Last Login	Disable	Edit
PClearwater	Penelope	Clearwater	pclearwater@ravenclaw.com	Provider	True	False	6/13/2015 2:15:30 PM	Disable	Edit
HagridR	Rubeus	Hagrid	hagrid@keeperofkeys.com	Provider	True	False	6/18/2015 12:01:01 AM	Disable	Edit

Figure 6. eAdmin User Management

### Add a New User

1. Click the “Plus” sign next to **Add New User** to open the form.
2. Enter the user’s information in the fields.
  - The Username must contain at least 8 alphabetic characters, without any special characters.
  - The Password must contain at least one upper case and one lower case alphabetic characters, at least one special character, and at least one number.
  - You may assign the same password to all new users, since each new user will be required to create a new, different password when they first log in.

3. If you want this user to be active, check the box at **Account Active**.
  - Uncheck the box to deactivate the account.
  - You can reactivate it at any time by checking the **Account Active** box.
4. Leave the box **Lock Account** unchecked. (Step 4 in *Edit a User* explains locking.)
5. Check the modules this new user will be allowed to work in. You can check any or all of them.
6. Save your changes by clicking the **Add New Profile** button.

The system sends an email to the new user, providing a link to PHC ONLINE SERVICES log in.

### Edit a User

Editing an existing user is similar to adding a new member, with a few differences:

1. In the list of members, click the *Edit* link at the end of the member's row to open the **Add/Edit User Details** form.
2. Edit the user's information as necessary.
3. Check or uncheck the box at **Account Active**, to change that setting.
  - You can also change a user's Active status by clicking the *Enable/Disable* link in the list view. If the link says *Disable*, it means the user is Active (i.e., you need to click *Disable* to disable the account), and vice versa.
4. If you need to unlock a User's account, uncheck the box at **Lock Account**.
  - If a User enters an incorrect password 5 times in a row when attempting to login, the system automatically locks the User's account. To unlock the account, the box at **Lock Account** need to be unchecked: Only an eAdmin can do this for the User.
5. Check or uncheck the modules this user is allowed to work in.
6. Save your changes by clicking the **Save User Profile** button.

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## User Guide

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The ***User Guide*** for PHC ONLINE SERVICES, which begins on the following page, is addressed to all Users. It provides information on using the non-administrative modules OF PHC ONLINE SERVICES.

The ***eAdmin Manual***, which begins on page 1, provides information to eAdministrators about the administrative features of PHC ONLINE SERVICES.

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## Logging In and Out of Online Services

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You can log in to PHC ONLINE SERVICES if you have a valid User account or valid eAdmin account.

### Logging In

#### ***First Login***

When your eAdmin created your User account, you will receive an email that includes your Username, default password, and link to the Login page.

1. Click the link in the email, it will take you to <https://provider.partnershiphp.org>.
2. On the Login page, enter your Username and password into the fields.
3. The Reset Password page will open. Enter a new password.
4. Log in using your new password.
5. Read and accept the Terms and Conditions for using PHC ONLINE SERVICES.

#### ***Subsequent Logins***

1. Access PHC ONLINE SERVICES at <https://provider.partnershiphp.org>.
2. Enter your Username and Password into the fields, then click the **Login** button.

If you are logged in but perform no action for 90 minutes, PHC ONLINE SERVICES will time-out and close. You will need to log in again to continue your work in PHC ONLINE SERVICES.

### Logging Out

When you have completed your work in PHC ONLINE SERVICES, you need to log out.

1. Click on your name, which you'll see in the top right corner of the page.
2. On the drop-down menu, click **Log Out**.

The other options under the drop-down menu are explained in *Select Options Under Your Name*.

### Retrieve a Forgotten Username or Password

If you forget your Username or your Password, the system can assist you.

#### ***Retrieve a Forgotten Username***

1. On the Login page, click the link *Forgot Username*.
2. On the Forgot Username page, enter your email address.
3. Click the **Request Username** button.

An email with your registered Username will be sent to you.

### ***Retrieve a Forgotten Password***

1. On the Login page, click the link *Forgot Password*.
2. On the Forgot Password page, provide your Username and email address.
3. Click the **Request Password Reset** button.
4. On the email that is sent to you, click the link to go to the Password Reset page.
5. Enter a new password, then enter it again to confirm it.
6. Click the **Submit** button.

You can now log in to PHC ONLINE SERVICES using your new password.

You can also change your password at any time by clicking your name in the top right corner of PHC ONLINE SERVICES and selecting **Update Profile**.

Your password will expire if you do not log into PHC ONLINE SERVICES for 180 days.

## The Basics of Working in PHC Online Services

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This section provides information pertinent to working throughout PHC ONLINE SERVICES, and explains how to:

- Access the Modules
- Select Options Under Your Name
- Navigate the Pages
- Work with Lists

### Access the Modules

When you log in, the Home page opens.

- At the top right of the page you will see your name.
- To the left of your name, you will see your organization's name. You have permission to access the data of members assigned to that organization.
- The main portion of the Home page shows the icons representing the five main user modules, as well as the eAdmin Management icon.
  - The icons that appear on a User's screen depend on the permissions assigned to that User; all five might not appear. The eAdmin icon is only available to eAdministrators.
- Below your name, you'll see the details for the eAdmins within your organization. Contact them when you have a question about your account.

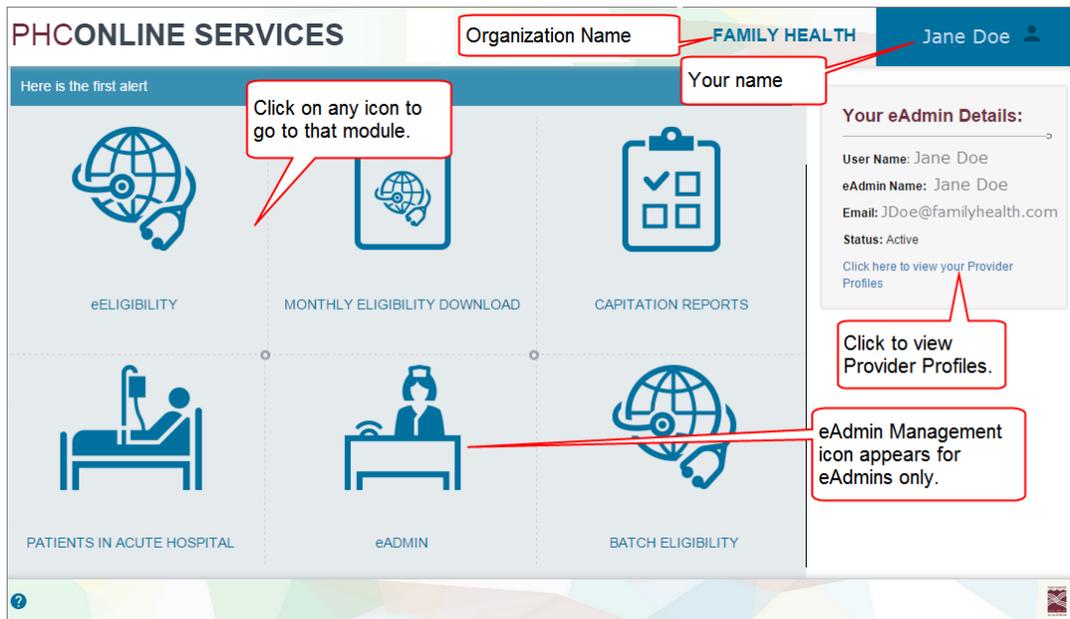


Figure 7. Home Page

- The Alert function (which will work from the line “Here is the first alert” near the top left of the screen) is not yet available; look for it on the next version of PHC ONLINE SERVICES.

### Select Options Under Your Name

At the top right corner of the Home page, you will see your name. When you click on it, a menu drops down with several options.

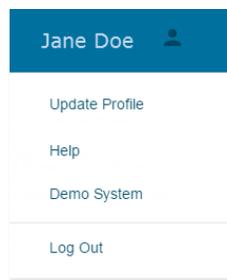


Figure 8. Options under Your Name

- Click **Update Profile** to open a page on which you can review and update your username, email address and password.
- Click **Help** to open a page from which you can access a PDF copy of this *User Guide*.
- **Demo System** will be available on a future phase of PHC ONLINE SERVICES.
- Click **Log Out** to end your session and exit PHC ONLINE SERVICES.

## Navigate the Pages

This section explains how to move from module to module.

- Access Modules from the Home Page
- Access Modules from the Navigation Section
- When to use Browser “Back” Button

### Access Modules from the Home Page

From the Home page, which appears when you log in, click on any module’s icon to go to that module.

### Access Modules from the Navigation Section

When you are in any module, the left side of the page offers navigation to all other modules.

- You can expand or collapse this side navigation by clicking the left or right facing  arrows.
- Clicking any of the logos or the text will open that module.

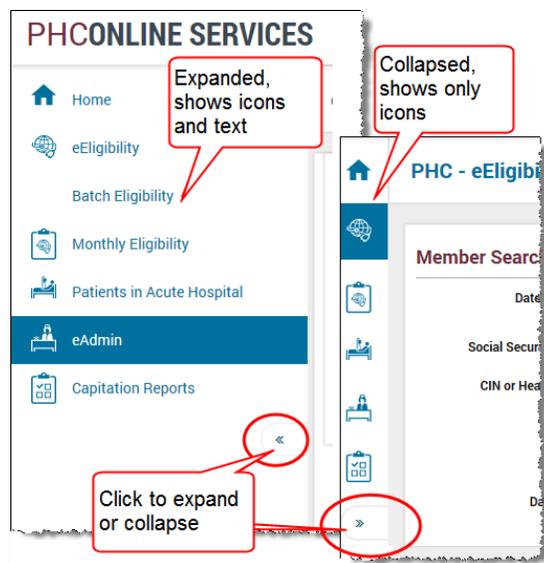


Figure 9 Expand or Collapse the Navigation Section

### When to use Browser “Back” Button

Let’s say you have performed a search that returned several members, and you clicked the appropriate button to open a secondary page to view a member’s eligibility report.

- Click on your browser’s “back” button to return to your search results.
- Click on the module’s icon in the navigation section, to wipe out your search results and go to a fresh blank search form.

## Work with Lists

This section explains how to look through the lists you generate within each module.

- Navigate Lists
- Sort Lists
- Print Lists

### ***Navigate Lists***

At the bottom left of any list, you will see the page numbers. Click any number to go to that page.



Figure 10. Navigating Lists

At the bottom right of any list, you will see:

- The number of pages in the list, and which page is currently displayed.
- The total amount of entries in the list.
- The entries currently displayed.

### ***Sort Lists***

You can sort lists by clicking on any column heading. For example, to sort by DOB:

- Click **Birth** to sort the list numerically by calendar date from low to high.
- Click **Birth** again, to sort the list numerically by calendar date from high to low.

Member Name	Record#	RP	Eff Date	End Date	Birth	Sex	Age	Other Insurace	BIC#/HIK#	Member Address
Brown, April	0009		3/1/2014	8/31/2015	10/21/1916	F				
Green, June	0006	10	11/1/2014	8/31/2015	2/17/1921	M				
Maroon, Tuesday	0000	10	8/1/2012	8/31/2015	3/21/1921	F	94	MD	5505555055	
Tan, Moon	0005	1H	6/1/2015	8/31/2015	12/29/1921	F	93	MF	9090909090	
Light, Augustus	0001	10	3/1/2014	8/31/2015	3/31/1922	F	93	MF	3030303030	

Sorted asc

Click any column heading to sort list by that category.

1 2

Page 1 of 2, items 1 to 4000 of 7193

Figure 11. Sorting Lists

**Print Lists**

You can print the information on most lists by clicking the Print icon  at the top right of the web page. (Clicking the Print icon does not print the entire browser screen; it prints the list.)

When you click the print icon, the **Print** dialog box opens.

Before starting to print, you can change:

- The orientation of the printing (portrait or landscape)
- The size of paper on which to print

Different web browsers have different methods for setting printing options. Consult your browser’s Help system or User Guide.

## Searching for Eligible Members

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The eEligibility module allows you to search for eligible members and to view detailed information about them.

This section explains how to:

- Search for Eligible Members
- View Member Eligibility Report

Access the eEligibility page from either the Home page or the left-side navigation section.

### Search for Eligible Members

1. Select the Date of Service.
2. Enter any of these criteria:
  - SSN (without hyphens, such as 999999999)
  - or**
  - CIN (without hyphens, such as 9999999999)
  - or**
  - Last Name **and** First Name
  - or**
  - Last Name **and** DOB (as MM/DD/YYYY; such as 01/01/1998)
3. Click the **Search Member** button.
4. Click the **Select** button, in the Actions column, to view details about this member.

### View Member Eligibility Report

When you click the **Select** button for a member, the system displays a report on that member.

Report Section	Information provided
Member Demographics	Contact information and other details about the member
Eligibility Details	Specifics about the member's eligibility
Primary Care Physician Details	Contact details about the member's PCP
Capitation Details	Capitation type and physician information
13 Month Eligibility Details	Details related to eligibility for the last 13 calendar months
PCP Messages	Advice to the provider of services relating to Medi-Cal, RAFS, TARS, and CCS, as applicable to the member
Special Messages	Information on the member's other coverages

**Member Demographics: MANREET HIATT**

Member Name: MANREET HIATT	Member ID: XXX
Gender: Male	Phone: XXX
Date of Birth: 09/21/2012	Address: XXX

**Eligibility Details:**

Member Eligible: <span style="background-color: #0070C0; color: white; padding: 2px;">Yes</span>	Date of Eligibility Notification: XXX
Program: Medi-Cal	SOC: No
AID Code: XXX	Other Insurance: NO MEDICARE/ NO OTHER COVERAGE
COUNTY: SOLANO	Primary Language: ENGLISH

**Primary Care Physician Details:**

PCP Name: <span style="background-color: #0070C0; color: white; padding: 2px;">SPECIAL MEMBER PARTNERSHIP HEALTHPLAN / CCS</span>	PCP Phone: XXX
PCP Address: XXX	PCP Fax: XXX

**CAPITATION DETAILS**

Member Cap Type	PCP Name/ Plan	Phone #
VISN	XXX	XXX
PCP	XXX	XXX
Mental Health	XXX	XXX

**13 MONTHS ELIGIBILITY DETAILS**

Effective Date	End date	County/AID Code	PCP Name/Prgm No	PCP Address	Other Ins
03/31/2015	5/31/2015	SOLANO/3N	XXX	XXX	NO MEDICARE/ NO OTHER COVERAGE
					NO MEDICARE/NO

**Is Eligible:** Yes

**Reference No.** XXX

**Program:** Medi-Cal

**Date of Service:** XXX

**PCP Messages:**

Special member status. Covered services must be provided by a certified Medi-Cal provider. RAFs are not required. The PHC Health Services Department must approve services requiring a TAR. All Medi-Cal covered services should be billed to PHC. Member is also covered by CCS. Services relating to CCS Medical conditions must be authorized by CCS and billed to PHC.

**Special Messages:**

NO MEDICARE/ NO OTHER COVERAGE.

**Case Management:** None

Figure 12. Member Eligibility Report

## Verifying Eligibility by Batch

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The Batch Verification module allows you to verify eligibility in “batches,” meaning you can create a report on several members at one time. The topics in this section are:

- Search for Eligible Members to Add to the Batch
- Check Eligibility for Members

Access the eEligibility page from either the Home page or the navigation menu.

### Search for Eligible Members to Add to the Batch

1. Select the Date of Service.
2. Enter any of these criteria:
  - SSN (without hyphens, such as 999999999)
  - or**
  - CIN (without hyphens, such as 999999999)
  - or**
  - Last Name **and** First Name
  - or**
  - Last Name **and** DOB (as MM/DD/YYYY; such as 01/01/1998)
3. Click the **Search Member** button.
4. The *search return list* shows the member, or members, that match the data on which you searched.

### Check Eligibility for Members

1. On the search return list, click the **Add Member** button for the member you want to add to the batch.
  - That member’s information is added to the batch list, below the search returns.
  - From the batch list, you can check eligibility.

The screenshot displays two tables. The top table, titled 'Search return list', has columns: Member Identifier/ CIN, Last Name, First Name, Gender, Date of Birth, Program, and Actions. It contains two rows of member data, each with an 'Add Member' button. The bottom table, titled 'Batch list', has columns: Member Identifier/ CIN, Last Name, First Name, Gender, Date of Birth, Prog Nbr, and Actions. It contains two rows of member data, each with a 'Remove Member' button. A green button labeled 'Check Eligibility for Members' is located at the bottom left. Three callout boxes provide instructions: one pointing to the 'Add Member' buttons, one pointing to the 'Check Eligibility for Members' button, and one pointing to the 'Remove Member' buttons.

Member Identifier/ CIN	Last Name	First Name	Gender	Date of Birth	Program	Actions
F049049049	HIATT	MANREET	Female	02/24/1984	Medi-Cal	Add Member
F00000008	HIATT	MANREET	Male	09/21/2012	Medi-Cal	Add Member

Member Identifier/ CIN	Last Name	First Name	Gender	Date of Birth	Prog Nbr	Actions
1E68:0888:088	FINN	HUCK	Male	08/17/1878	Medi-Cal	Remove Member
F00000008	HIATT	MANREET	Male	09/21/2012	Medi-Cal	Remove Member

Check Eligibility for Members

Figure 13. Check Eligibility for Member

2. Click the **Check Eligibility for Members** button.
  - The page that opens presents Member Eligibility Reports for **all** the members in the batch list. Because this batch report presents several reports, one after another, be sure to scroll down to see all of them.
  - See *View Member Eligibility Report* on page 18 for an explanation of the report.
3. Use the **Back** button on your browser to close the reports page and return to your batch list.
4. If you decide to remove any member from the batch list, click the **Remove member** button next to their name.

## Using Monthly Eligibility Download

The Monthly Eligibility Download module allows you to search for a particular month's eligible members, based on selected provider profiles.

This section explains how to:

- Select Provider Profiles
- View Members
- Download the List

Access the Monthly Eligibility page from either the Home page or the left-side navigation section.

### Select Provider Profiles

1. Select the provider or providers from the drop-down list, then click the **Select Provider Profiles** button.
  - Only three providers are listed at a time. If there are more providers, they will be listed on additional pages, three per page.
2. Click any of the **View** buttons, which appear if there are members for that provider, whether as Capitated Members, Special Members or Hospital Capitated Members.

The screenshot shows the 'Monthly Eligibility' interface. At the top, there is a search area with a dropdown menu containing codes like '1011', '0001, 1011', '0003, 1030', etc., and a 'Select Provider Profiles' button. A red callout box points to this area with the text: 'Select Providers from drop-down menu, then click Select Provider Profiles button'. Below the search area is a table with columns: Program, Region, Affiliation, Provider Name, Speciality, Capitated Members, Special Members, and Hospital Capitated Members. Three rows are visible, each with a 'View' button. A red callout box points to these buttons with the text: 'List of providers is returned; three per page.' and 'Click any View button to populate list below for that category, for that provider.' Below the table is a date selector set to 'June - 2015' and an 'Extended Format' button. A red callout box points to the date selector with the text: 'Select date to further define the list.' At the bottom, there is a detailed member list table with columns: Member Name, Record#, RP, Eff Date, End Date, Birth, Sex, Age, Other Insurace, BIC#/HIK#, New Member, and Member Address. The first three rows of this table are highlighted in pink.

Figure 14. Searching Monthly Eligibility

## View Members

1. Click the **View** button of the provider and type you want to view.
  - The list for these members populates below the Provider list.
  - The default date is the current month and year.
2. Change the date if you want to view members from a previous month.

The member details list provides information for each member, in a sortable list:

- Member name (given as Last Name, First Name)
- Record Number
- RP (Risk Population. If this impacts the member, the column displays the relevant Aid Code under which the member qualifies for Medi-Cal.)
- Effective Date
- End Date
- DOB (Date of birth)
- Sex
- Age
- Other Insurance
- BIC (Benefits Identification Card number, assigned by the state. A BIC number is unique to the person to whom it is assigned. )
- New Member (Any member who is new to that PCP per PHC records, in the reporting month you selected.)
- Member Address (Given as a block of text containing street address, city, state and zip, and phone number.)

### ***Extended Format of This List***

Click the checkbox next to **Extended Format** to display the same information in a slightly different format. The Extended format provides:

- Member name in two separate columns: First Name and Last Name
- Address split in five separate columns: Address 1, Address 2, City, State, Zip, and Phone

Extended Format is helpful if you need to sort the data by criteria not available on the standard list, such as Zip code.

## Download the List

You can download this list in either regular format or extended format. Click either the PDF icon or the Excel icon, which are above the member name column. Then save the report file to your own computer or network.

## Preparing Capitation Reports

The Capitation Reports module allows you to:

- Search for Reports
- Sort a Report
- Download a Report

Access the Capitation Reports page from either the Home page or the left-side navigation section.

### Search for Reports

To run a capitation report:

1. Select, from the drop-down list, the Month and Year for which you want the report.
2. Select the provider or providers from the drop-down list.
3. Click the **Select Provider Profiles** button.

Payee No	Cycle	Run Date	Address	IRS #	Product Line	Type	Download
011B	10	7/6/2014 7:00:17 AM	FILE 555, LOS ANGELES, CA 90074	80	MC	PCP	PDF TEXT EXCEL
011B	02	7/6/2014 7:00:17 AM	FILE 555, LOS ANGELES, CA 90074	80	MC	PCP	PDF TEXT EXCEL
011B	02	7/6/2014 7:00:17 AM	FILE 555, LOS ANGELES, CA 90074	80	YO	PCP	PDF TEXT EXCEL
011B	02	7/6/2014 7:00:17 AM	FILE 555, LOS ANGELES, CA 90074	80	NA	PCP	PDF TEXT EXCEL
011B	09	7/6/2014 7:00:17 AM	FILE 555, LOS ANGELES, CA 90074	80	MC	PCP	PDF TEXT EXCEL

Figure 15. Search for Capitation Reports

### Sort a Report

You can sort this list by clicking on any column heading. For example, to sort by Payee No.:

- Click Payee No and the list will be sorted by *lowest* payee number to highest.
- Click Payee No again to sort by *highest* number to lowest.

### Download a Report

The Download column provides links that allow you to download that data as either a PDF file, a TXT file, or an MS Excel spreadsheet.

## Listing Patients in Acute Hospitals

Access the Patients in Acute Hospital page from either the Home page or the left-side navigation section.

1. Select the provider or providers from the drop-down list, then click the **Select Provider Profiles** button.

For the providers you selected, the search will list their PHC patients admitted to an acute care hospital.

The screenshot shows the 'Patients In Acute Hospital' interface. At the top, there is a dropdown menu set to 'All items checked' and a blue button labeled 'Select Provider Profiles'. Below this are two icons: a PDF icon and an Excel icon. The main content is a table with the following columns: First Name, Last Name, CIN, DOB, GENDER, Hospital Details, Admission Date, Diagnosis Code, Diagnosis Description, and PCP Details. Two rows of patient data are visible. At the bottom of the table area, there is a page indicator '1' and the text 'Page 1 of 1, items 1 to 2 of 2.'. Below the table, a note states: 'Note: This report is based only upon the hospital's submission of an inpatient Treatment Authorization Request (TAR) to PHC. The patient may have received care at a site that did not submit a TAR in a timely manner.'

First Name	Last Name	CIN	DOB	GENDER	Hospital Details	Admission Date	Diagnosis Code	Diagnosis Description	PCP Details
Becky	Thatcher	999888777	12/31/1898	F	xxxxxxx	8/5/2015	66970	CESAREAN DELIV NOS-UNSP	xxxxxxx
Huckleberry	Finn	111222333	7/04/1898	M	xxxxxxx	7/21/2015	9779	POISON-MEDICINAL AGT NOS	xxxxxxx

1 Page 1 of 1, items 1 to 2 of 2.

Note: This report is based only upon the hospital's submission of an inpatient Treatment Authorization Request (TAR) to PHC. The patient may have received care at a site that did not submit a TAR in a timely manner.

**Figure 16. Listing Patients in Acute Hospitals**

2. Download this list by clicking either the PDF icon or the Excel icon, which are above the first name column.