Partnership HealthPlan of California

Online Services User Guide *with eAdmin Manual*

TABLE OF CONTENTS

Introductory Information

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

THIS PAGE INTENTIONALLY LEFT BLANK

eAdmin Manual

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.

THIS PAGE INTENTIONALLY LEFT BLANK

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.

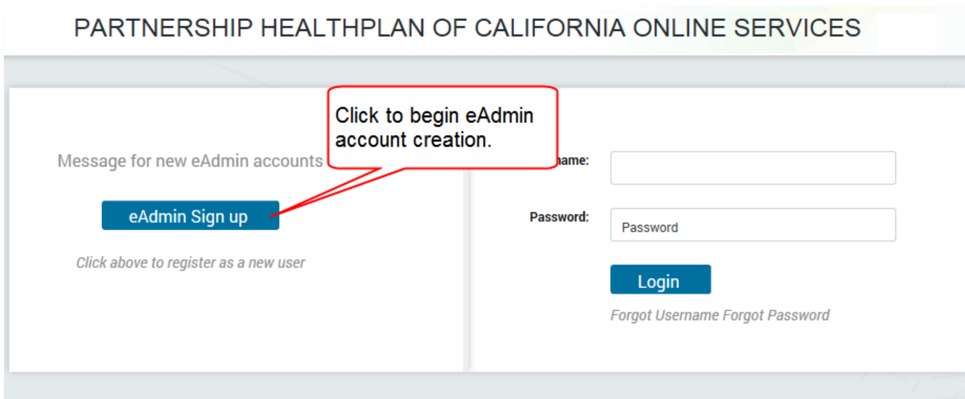


Figure 1. Launching Signup

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

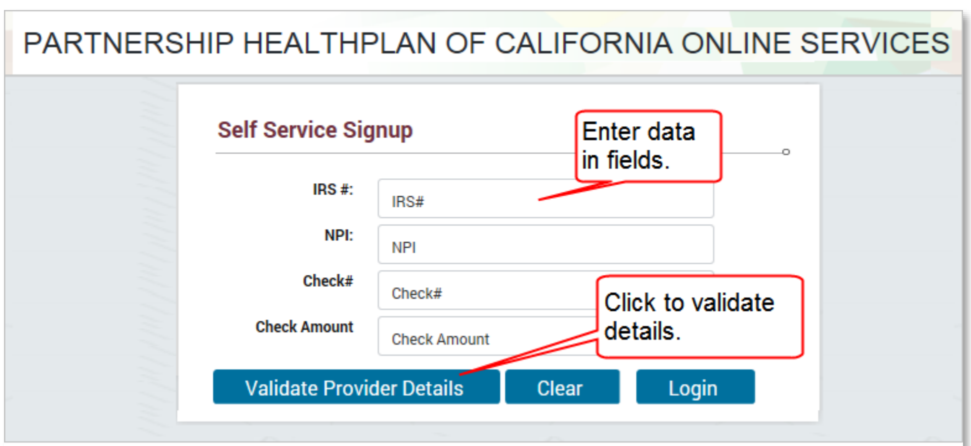


Figure 2. Self-Service Signup

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*.

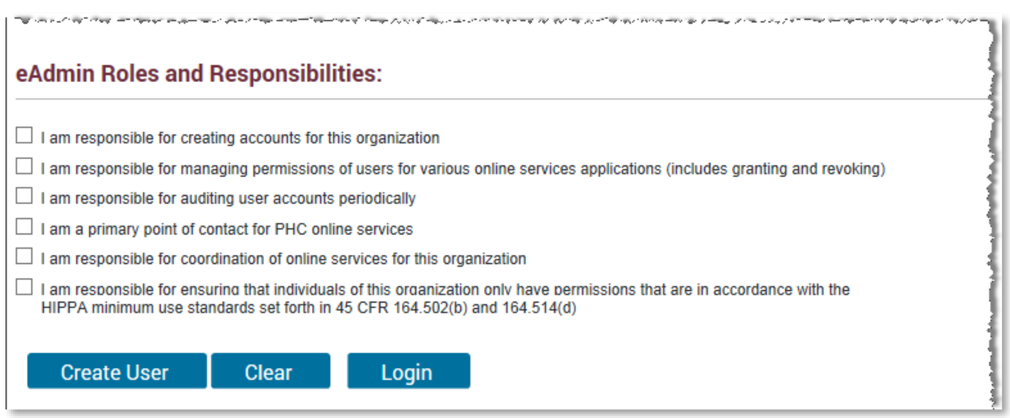


Figure 3. New User Registration Attestation

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.)

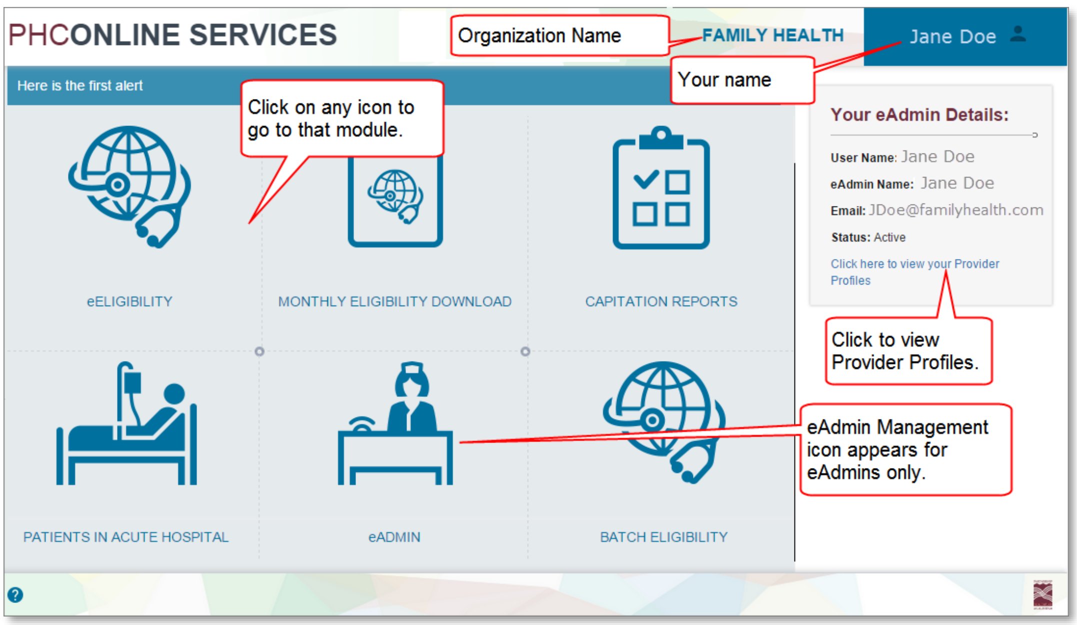
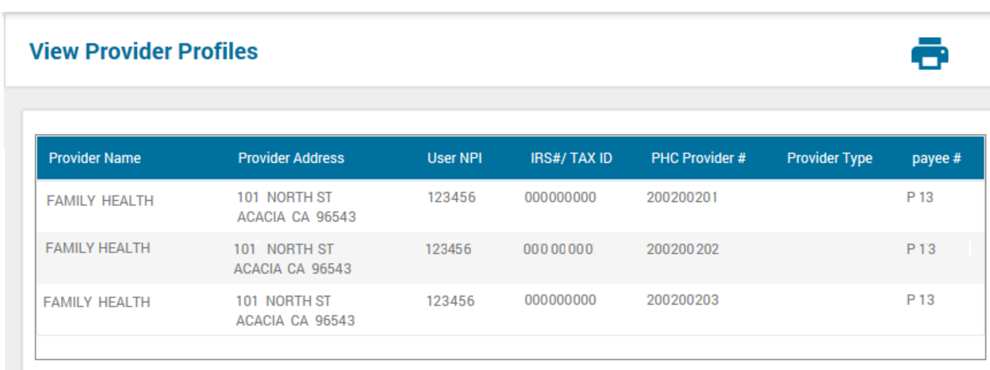


Figure 4. Home Page

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



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	000 00 000	200200 202		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.

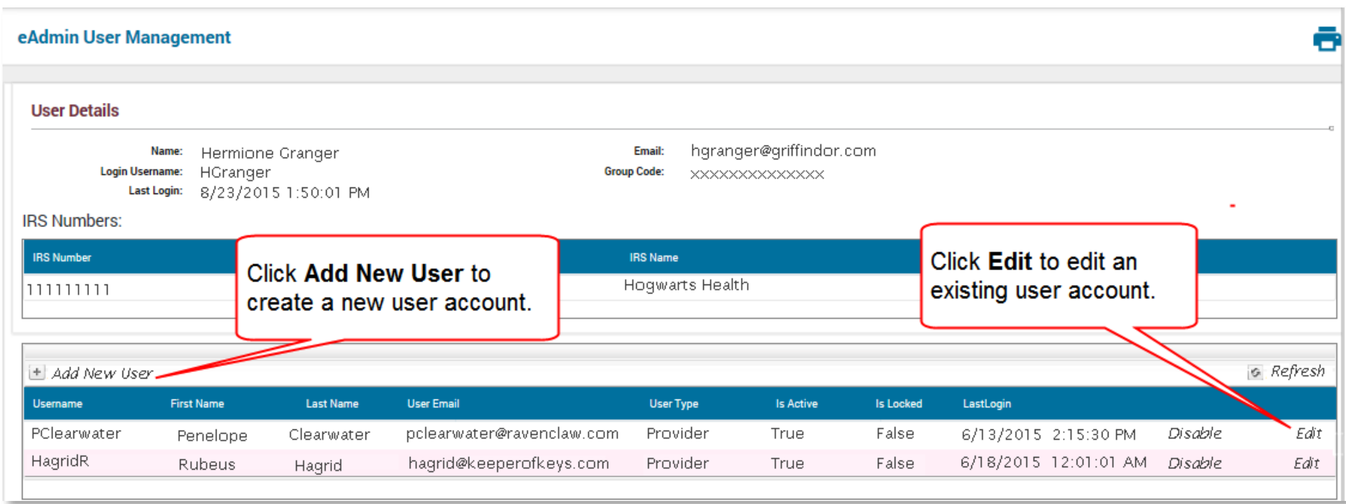


Figure 6. eAdmin User Management

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.

THIS PAGE INTENTIONALLY LEFT BLANK

User Guide

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.

THIS PAGE INTENTIONALLY LEFT BLANK

Logging In and Out of Online Services

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

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.

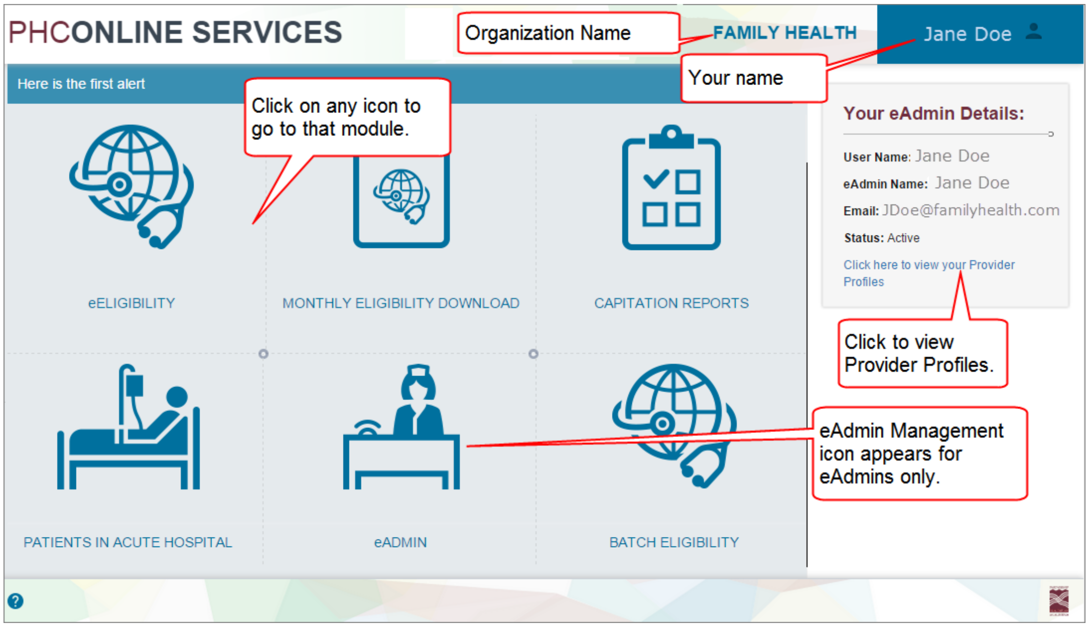


Figure 7. Home Page

- 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.

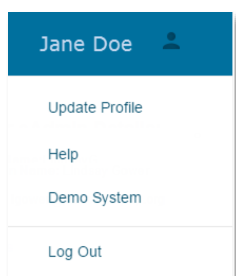


Figure 8. Options under Your Name

- 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.

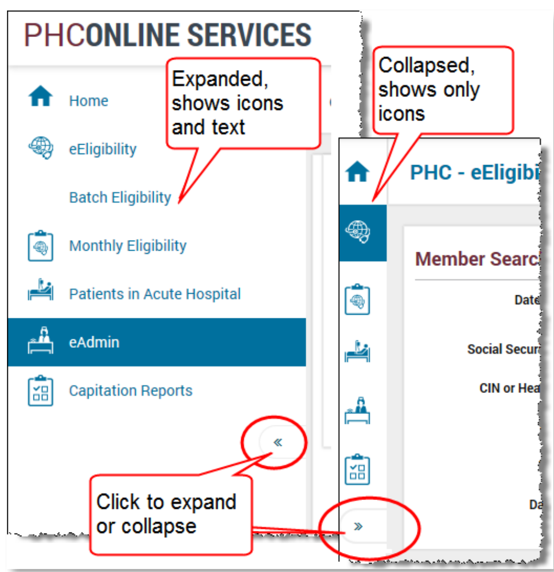


Figure 9 Expand or Collapse the Navigation Section

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.

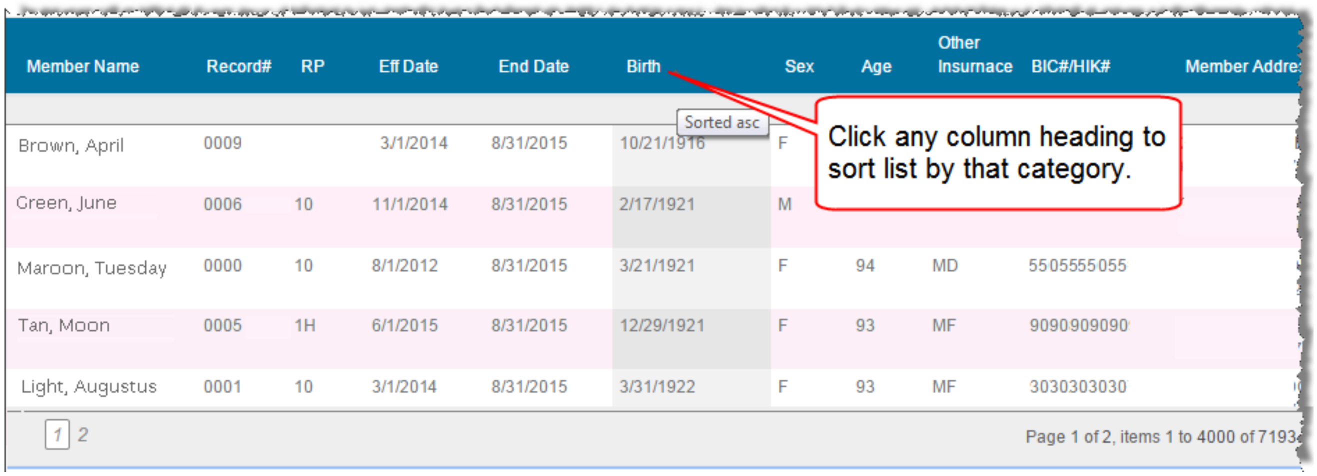


Figure 11. Sorting Lists

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

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

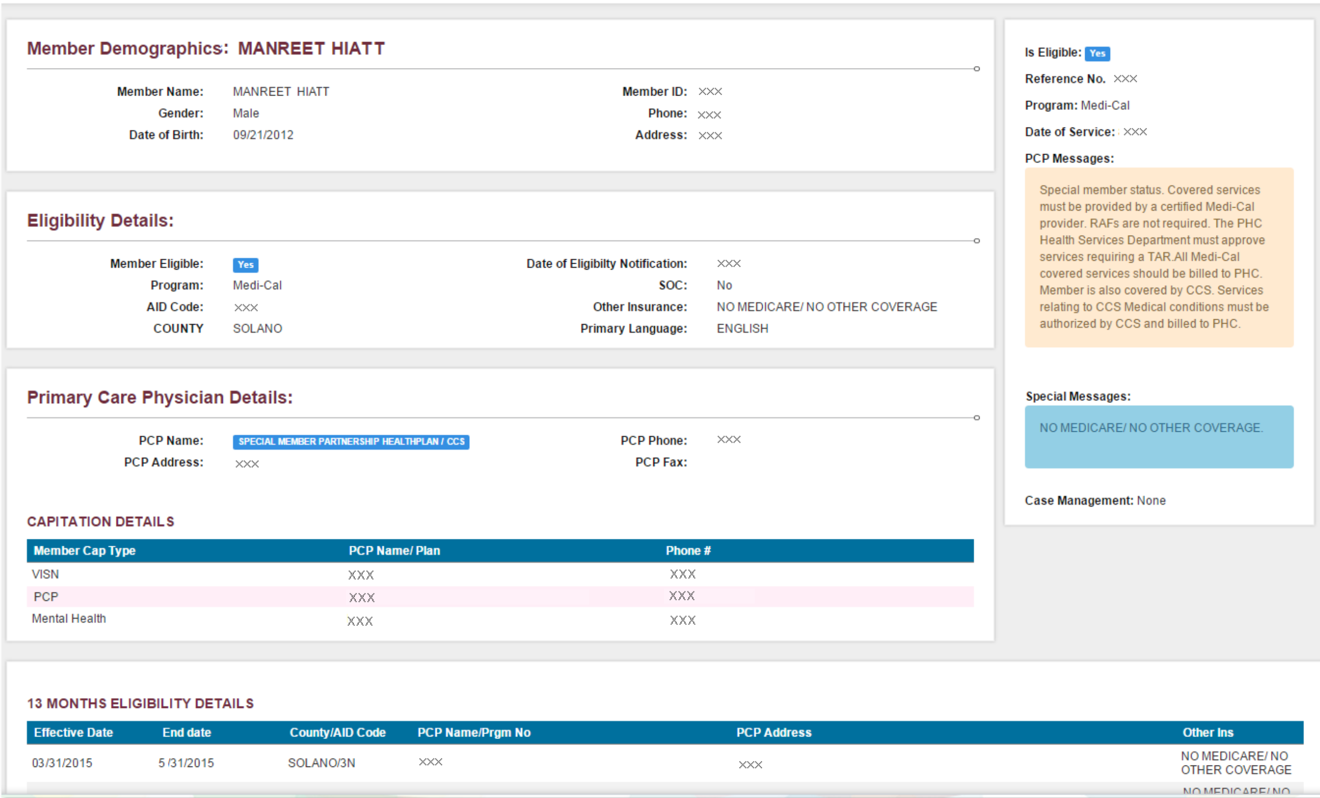


Figure 12. Member Eligibility Report

Verifying Eligibility by Batch

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 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. 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.

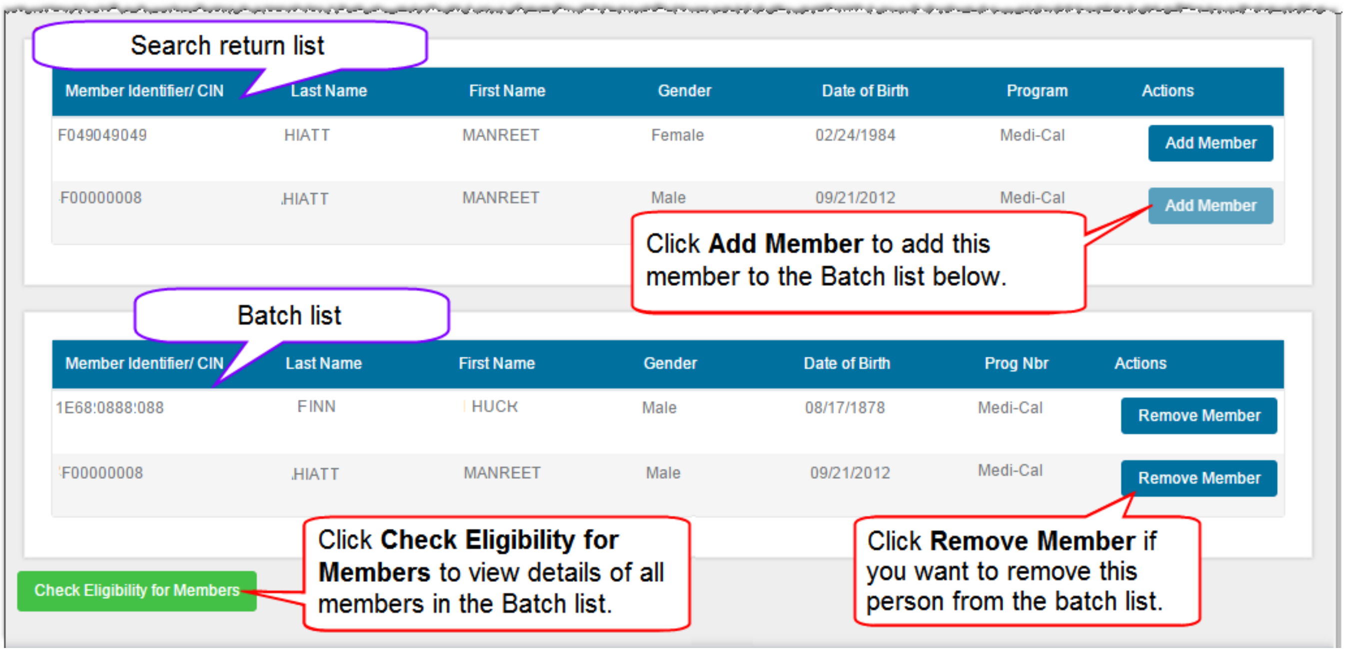


Figure 13.Check Eligibility for Member

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 Eligibilty 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.

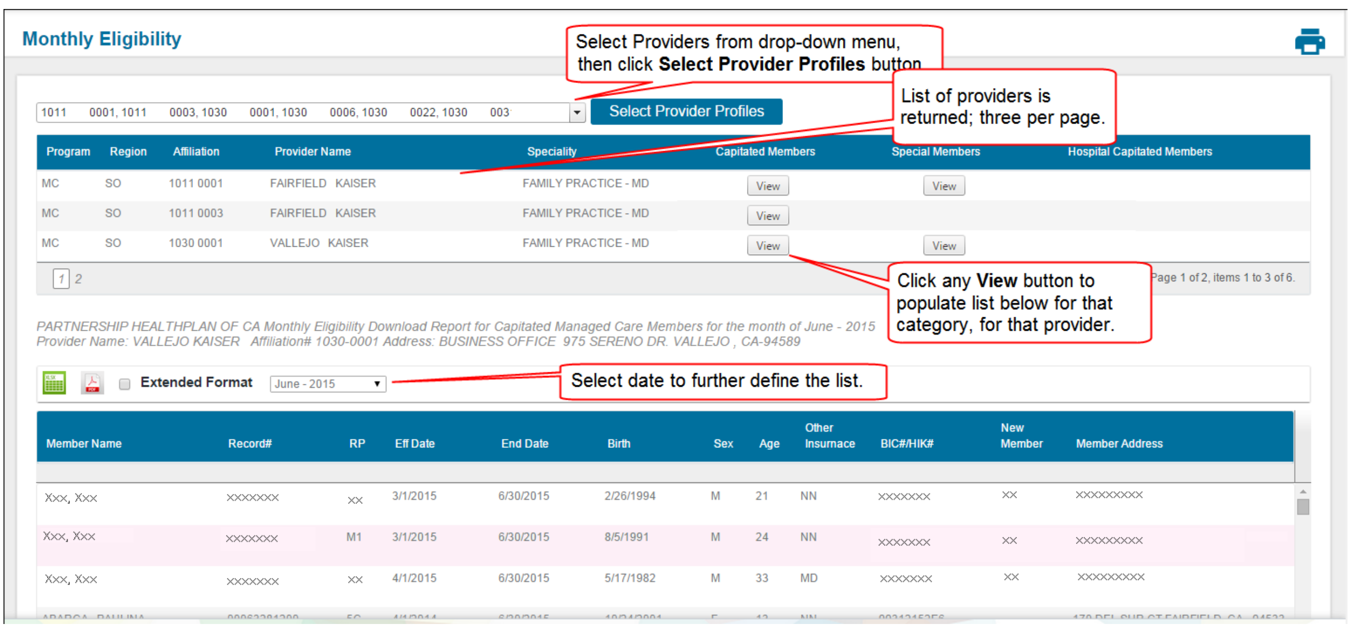


Figure 14. Searching Monthly Eligibility

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:

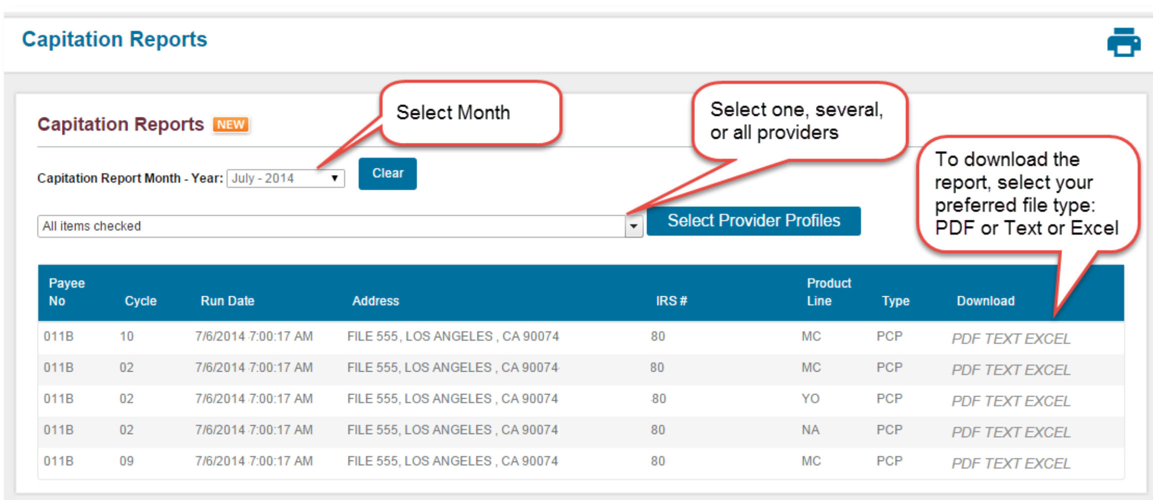
- Search for Reports
- Sort a Report
- Download a Report

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.

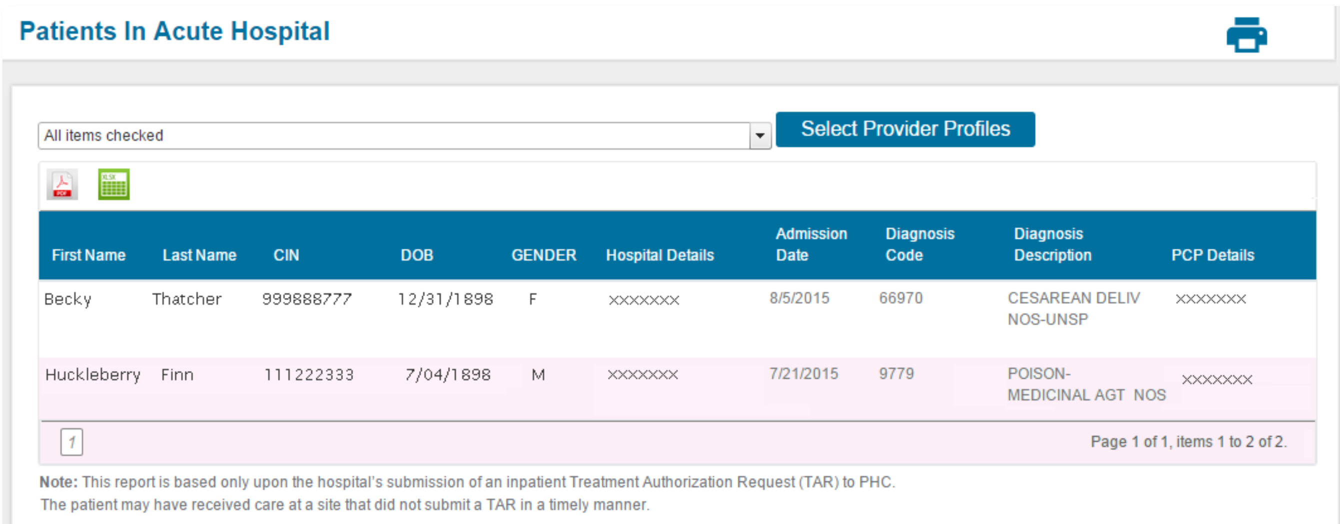


Figure 16. Listing Patients in Acute Hospitals

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