Online Portal Training:
Health Home & Primary Care Provider Program

Health Home & PCP Reports
1/4/2017
Agenda

- Overview
- Registration
- Administration
- Reports
Overview

- Online Portal live on November 18, 2016 for Medicaid Remittance Advices.
- PCP Remit went live January, 2017
- Health Home and PCP Paid Claims Reports, tentatively Live February, 2017
- Cost Settlement and ASA Census Letters Coming Soon.
- Eligibility Inquiry Coming Soon.
Accessing the Online Portal

- Click on the logo located on the DSS Online Portal webpage:

- Below is the direct link for the Online Portal login:
  - https://dss.sd.gov/ocp/Account/Login
New Registration Requests

➢ Be Prepared. Ensure you have the following information to sign up:

  – MEDX ID
    • Contact YOUR internal Provider Credentialing Specialist
    • This is unique to each Billing NPI
  
  – FEIN (or SSN if sole proprietorship)
    – Federal Employer Identification Number
  
  – BNPI
    • Billing NPI for Facility, Group, or Individual (if no facility or Group)
Registration & Account Setup Process

- There may be an existing account administrator for your Billing NPI, within the Online Portal. This administrator will need to create an account for you.

- A Listserv message was sent on December 23rd to all existing Provider Admin users notifying them of the upcoming effort to assist with facilitating the addition of Health Home and PCP Reports.
  - This message encouraged them to plan for and coordinate the requests for account access, needed by Health Home and PCP staff within their facilities.

- If you do not know who your Provider Admin is, please contact your Facility or Clinic Manager. This person may be able to assist with facilitating the account setup process.
New Registration Request Form

New Registration for Provider Administration (you can request access to one or more Billing NPI's)

- indicates required fields

**Provider**
(605) 556-1234

**Tester**

**SDMEDX ID**

**Tax Id**

**Billing NPI**

Billing NPI's that you are requesting access to:

- Enter Billing NPI to search from the list below.

- 1821039514

**的重要：一旦您注册进入此Portal，您的组织将不再接收纸质汇款单据。汇款单据将在登录后立即可供访问。**

Submit  Cancel
Administration

- **Provider Admin**
  - Can add and update Provider Admins and Provider Users
  - Access to one or more BNPI and all SNPI associated with them
  - Can Update existing user accounts to add or remove BNPI & SNPI access and their account permissions

- **Provider User**
  - Able to View or Print
  - Access to customized BNPI/SNPI combinations
  - Cannot register - must be added by a Provider Admin
Adding Admin Users

Add Provider Admin

- Sally
- Sanders
- (605) 123-4567
- sally.sanders@test.test
- 1234 Testing Lane
- South Dakota
- PIERRE
- 57501

Please select User Type to get started

- Provider Admin

Please fill up the contact details to proceed to next screen

* indicates required fields

Next  Cancel
Updating User Accounts

Update Provider User

- Bob
- Tester
- (605) 321-6547
- Bob.Tester@test.testing
- 1234 Testing Lane
- South Dakota
- Pierre
- 57501

Please select User Type to get started
- Provider User

Options:
- InActive

RESET PASSWORD

Please fill up the contact details to proceed to next screen

Click Next or Cancel.
Update Provider Admin User Screen 2

Billing NPI

Billing NPI:
- 1265418669
- 1326024720
- 1598747651
- 1740262880
- 1821073792
- 1881679751

Select All

Permissions Available
- Select All
- Administration
- Claims RA
- Cost Settlement
- Eligibility Status

Permissions Selected
- Select All
- H.Homes - RA
- PCP - RA
- H.Homes-Case Load
- PCP - Case Load

Billing NPI's that you are granting access to

Enter Billing NPI to search from the list below
- 1265418669
- 1326024720
- 1598747651
- 1740262880
- 1821073792
- 1881679751
Update Provider User Screen 2

Update Provider User

Billing NPI

- Billing NPI

Select All

- 1265418669
- 1325042720
- 1598747651
- 1740262880
- 1821073792
- 1881879751

Permissions Available

- Select All
- Claims RA
- Eligibility Status
- Cost Settlement

Permissions Selected

- Select All
- Reports
- H.Homes - RA
- H.Homes Case Load
- PCP - Case Load
- PCP - RA

Billing NPI - Servicing NPI

- Servicing NPI
- 1265418669 - 1265418669

Billing NPI's that you are granting access to

Enter Billing NPI to search from the list below

- 1265418669 - 1265418669

Add

Back Update Cancel
Health Homes and PCP Remittance Advices

- Populating Report Views
  - To and From Date span fields allow for retrieval of reports created up to 1 year (monthly or quarterly) prior to the current date
  - Reports created more than 1 year prior to current date, will roll off. *Remember to download and save reports as needed.*
  - Search criteria can be entered to generate reports based on user specified parameters

- Viewing Reports
  - The reports will populate based on any generated during the specified date span, allowing the user to select individual reports to “View”
  - Reports will open in a new browser tab in PDF format to view, print and or save a report.
  - Users also have the ability to Export Reports to Excel for additional review and functionalities allowed by Microsoft Excel
Health Home Remittance Advice

- The Health Home RAs will be generated quarterly, per the current schedule.
- It is important to note that the process for generating payment is not changing:
  - January – March Quarter: March 31 – April 30
  - April – June Quarter: June 30 – July 31
  - July – September Quarter: September 30 – October 31
  - October – December Quarter: December 31 – January 31
- The Remittance Advice reports can be retrieved for up to 1 year (4 quarters) prior to the current date:
  - There will be a rolling history of 4 quarters available.
Health Homes Remittance Advice

Only 52 weeks of previous reports from today’s date can be searched.

Please select whether you want to view all servicing NPI’s in one file or individual files.

- Combined Remittance by BNPI
- Separate Remittances by BNPI / SNPI

Enter a date range (MM/DD/YYYY) to view your organization’s information.

From 11/01/2016 To 1/3/2017

Create Report

<table>
<thead>
<tr>
<th>PCP Remittance Advices from 11/01/2016 till 1/3/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>RA Date</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>12/27/2016 1275553463</td>
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<td>12/27/2016 1275553463</td>
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<td>12/27/2016 1275553463</td>
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<td>12/27/2016 1275553463</td>
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<td>12/27/2016 1275553463</td>
</tr>
</tbody>
</table>

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PCP Remittance Advices

- The PCP RAs will be generated on a monthly basis, per the current schedule.
- It is important to note that the process for generating payment is not changing.
  - Payment runs the last Tuesday, before the last Thursday of each month.
- The Remittance Advice reports can be retrieved for up to 1 year (12 months) prior to the current date.
  - There will be a rolling history of 12 months available.
<table>
<thead>
<tr>
<th>REFERENCE NUMBER</th>
<th>REFERENCE NUMBER</th>
<th>PAYEE</th>
<th>FROM DATE</th>
<th>THRU DATE</th>
<th>AMOUNT</th>
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<tbody>
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<td>11/30/2016</td>
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<td>3.00</td>
</tr>
</tbody>
</table>
The Caseload reports are generated on a monthly basis.

- These reports are generated either the last working day of the month, or the first working day of the next month, if the 1st is a working day.

It is important to note that the process for generating these reports is not changing.

Caseload reports can be retrieved for up to 1 year (12 months) prior to the current date.

- There will be a rolling history of 12 months available.
Health Home & PCP Caseload Reports

### Health Home Caseload

<table>
<thead>
<tr>
<th>Report Year</th>
<th>Billing NPI</th>
<th>Servicing NPI</th>
<th>Clinic Id</th>
</tr>
</thead>
<tbody>
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<td>12</td>
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<td></td>
<td>111431797</td>
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<td></td>
</tr>
</tbody>
</table>

- **Select All**
- **Printable Report**
- **Recipient & Family Information**
- **Export to HIE**

### Recipient Information

<table>
<thead>
<tr>
<th>Recip ID</th>
<th>Billing/Servicing Provider Name</th>
<th>Recip First/Last Name</th>
<th>Case Name</th>
<th>Clinic ID</th>
<th>Tax ID</th>
<th>Billing NPI</th>
<th>Billing Provider Name</th>
<th>Servicing NPI</th>
<th>Servicing Provider Name</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Kyle Clinic</td>
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<td>1003963497</td>
<td>Kyle Clinic</td>
<td>577520540</td>
<td></td>
</tr>
</tbody>
</table>

- **Export to Excel**

**Strong Families - South Dakota’s Foundation and Our Future**
Types of Caseload Reports

There are two types of Caseload reports available in the Online Portal:

- Printable Version – This will provide the same information as is currently provided in the printed Caseload report you receive
- Recipient & Family Information – This is a download to Excel, containing all the information
New Functionality

- Export to HIE is newly developed functionality within the Portal that allows Providers to be notified of ER visits and hospitalizations for their current Recipients.
  - This notification is a current requirement of the Health Home Program.
  - This functionality is also being made available to PCP Providers, in the near future.

- The Export to HIE will also be located under the Health Home and PCP Caseload report options.
  - This is another export/download created for the purpose of uploading your Caseload information to the Health Information Exchange
Resources & Contact Information

- [http://dss.sd.gov/medicaid/portal.aspx](http://dss.sd.gov/medicaid/portal.aspx)
- [dssonlineportal@state.sd.us](mailto:dssonlineportal@state.sd.us)