

*West Virginia Trading Partner Account
Primary Care Provider Roster User Guide*

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¹ 45 CFR Parts 160 and 164, Standards for Privacy of Individually Identifiable Health Information; Final Rule

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Table of Contents

1. Introduction.....	1
2. Primary Care Provider Roster	1
2.1 Primary Care Roster Search	1
2.2 Export the PCP Roster to Excel.....	5
2.3 Print the PCP Roster	6
3. PCP Roster Functions.....	7
3.1 View Member Details.....	7
3.2 View Electronic Health Record.....	9
3.3 Verifying Member Eligibility	10
3.4 Claims Submission	10
Appendix A – Acronyms and Abbreviations.....	11

Table of Figures

Figure 2–1: Accessing the PCP Roster	1
Figure 2–2: PCP Roster	2
Figure 2–3: Last Name Hyperlink	2
Figure 2–4: Search Feature	3
Figure 2–5: Smart Search for Potential Members.....	4
Figure 2–6: Searching by Last Name.....	4
Figure 2–7: Print and Excel Options.....	4
Figure 2–8: Export to Excel Hyperlink.....	5
Figure 2–9: File Download Window	5
Figure 2–10: PCP Roster Excel Spreadsheet	6
Figure 2–11: Print List Hyperlink.....	6
Figure 2–12: PCP Roster List PDF.....	7
Figure 3–1: Last Name Hyperlink	8
Figure 3–2: Member Details Window	8
Figure 3–3: Electronic Health Record Button	9
Figure 3–4: Electronic Health Record	9
Figure 3–5: Verify Eligibility	10
Figure 3–6: Submitting a Claim	10

1. Introduction

This user guide describes the process for creating, searching, exporting to Excel, and printing a primary care roster via the DXC Technology web portal. Functions of the roster reviewed in this document include viewing member details, viewing electronic health records, viewing member eligibility, and claims submission.

2. Primary Care Provider Roster

You can create a custom roster or a list of participants (members) associated with a particular primary care provider. Some advantages of creating a Primary Care Provider (PCP) Roster are that you can verify eligibility, view diagnosis history, or submit a claim directly from the Primary Care Roster screen. To access the **Primary PCP Roster**, click the **View PCP Roster** link in the **Form Entry** section of the navigation pane. Refer to **Figure 2–1**.



Figure 2–1: Accessing the PCP Roster

3. Primary Care Roster Search

The **PCP Roster** screen opens. Refer to **Figure 2–1**. From the **Billing Provider** drop-down list, click the name of your **Billing Provider**. The **PCP Roster** displays with participants sorted alphabetically by last name.

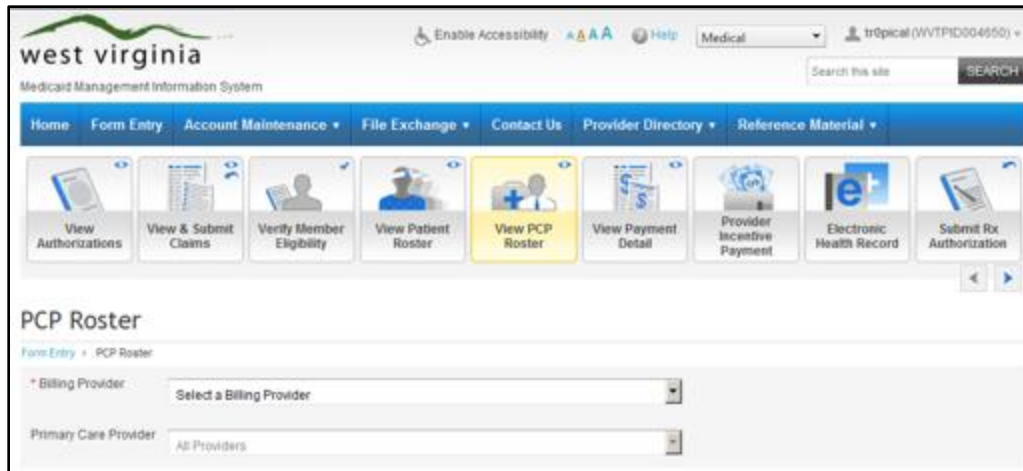


Figure 2–1: PCP Roster

The **PCP Roster List** displays the following information:

- **Last Name**
- **First Name**
- **Date of Birth**
- **Member (Participant) ID**
- **PCP Effective Date**
- **PCP Term Date**
- **Program**

To view the information about the participant, click the **Last Name** hyperlink. *Refer to Figure 2–2.*

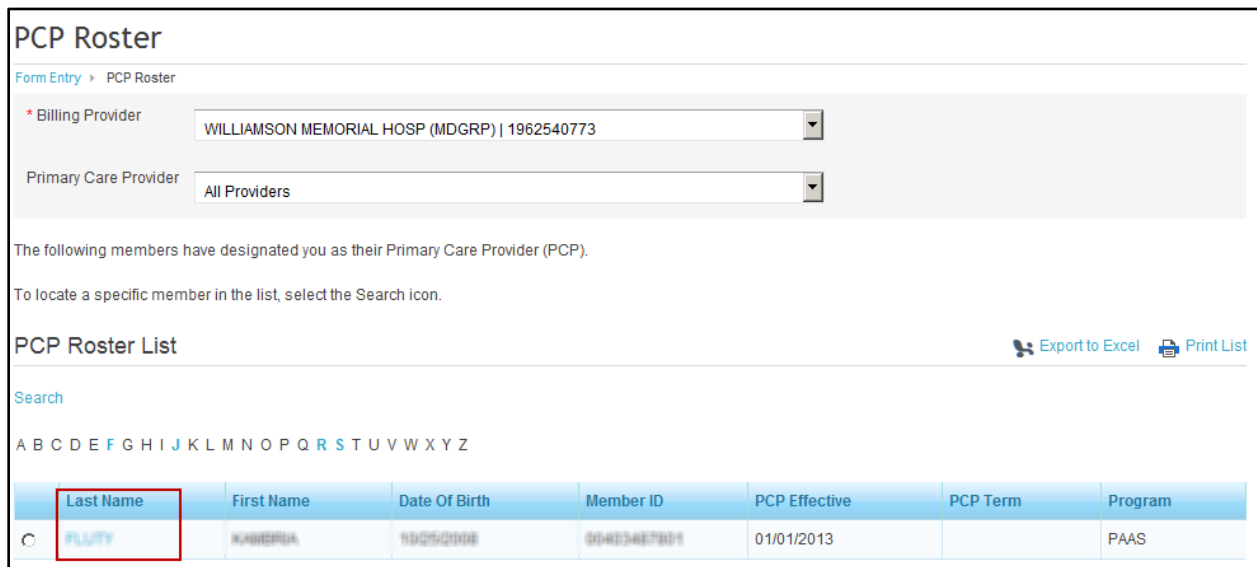
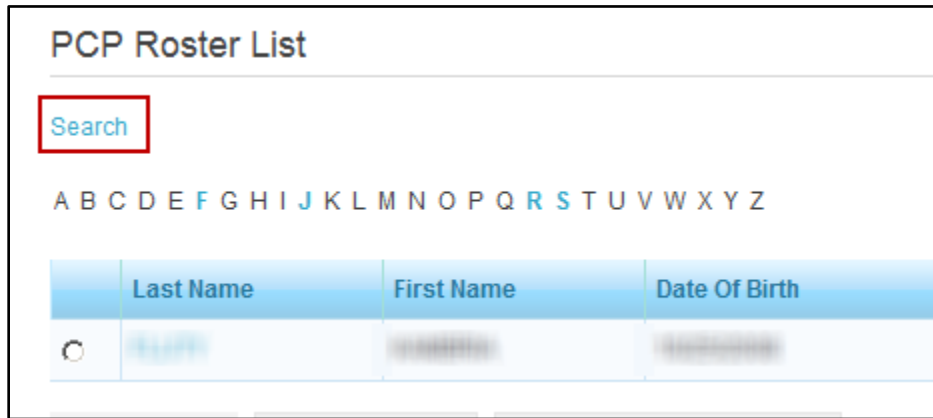


Figure 2–2: Last Name Hyperlink

To search for a specific participant, click **Search**. Refer to **Figure 2-3**.



PCP Roster List

Search

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Last Name	First Name	Date Of Birth
<input type="radio"/>	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX

Figure 2-3: Search Feature

In the **Find** field, type the member's name or member ID and click **OK**. A list of potential members displays. Select the appropriate member from the list. *Refer to Figure 2–4.*



Figure 2–4: Smart Search for Potential Members

OR

Another search option is to click one of the highlighted letters. The highlighted letters indicates that there are members whose name begins with one of the highlighted letters on the roster. *Refer to Figure 2–5.*

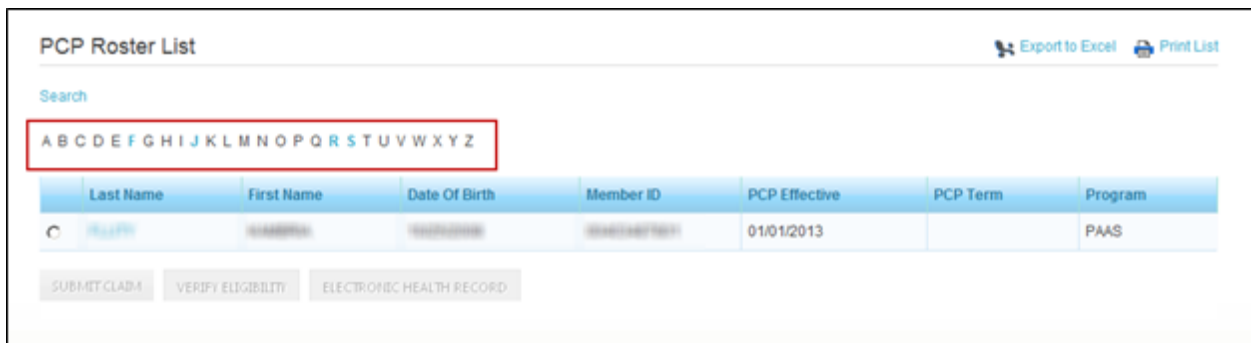


Figure 2–5: Searching by Last Name

Note the two tabs: **Print List** and **Export to Excel**. *Refer to Figure 2–6.*

- Click **Print List** to print all members.
- Click **Export to Excel** to create a Microsoft Excel spreadsheet.

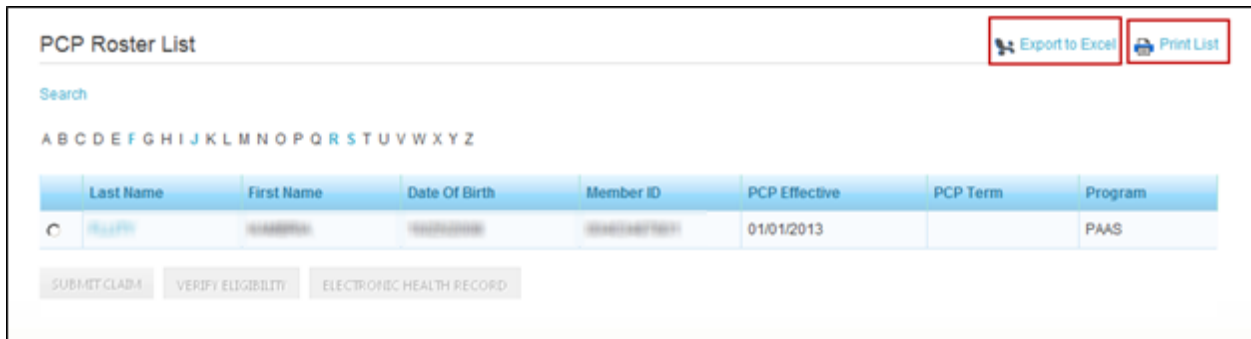


Figure 2–6: Print and Excel Options

3.1 Export the PCP Roster to Excel

To export a PCP Roster to Excel, follow these steps:

1. Navigate to the PCP Roster. Click the **Export to Excel** hyperlink. Refer to **Figure 2–7**.



Figure 2–7: Export to Excel Hyperlink

2. On the **File Download** window, click **Open**. Refer to **Figure 2–8**.

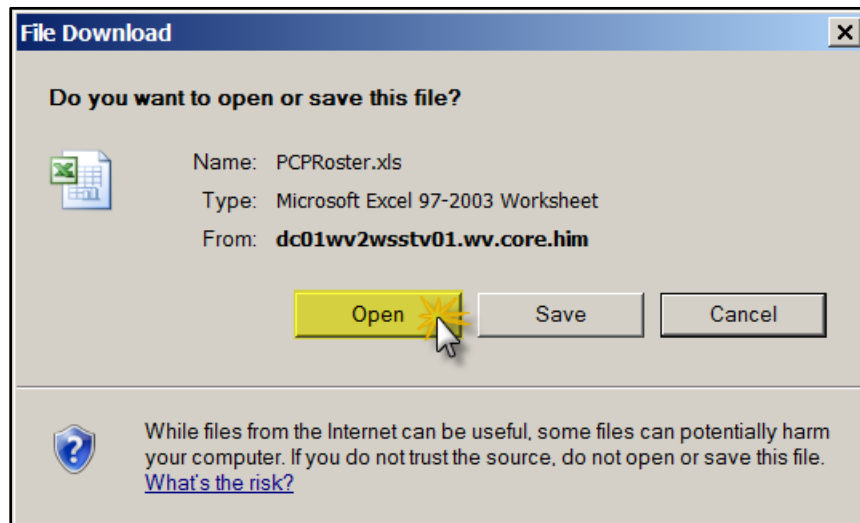


Figure 2–8: File Download Window

3. The PCP Roster opens in Excel. *Refer to Figure 2–9.*

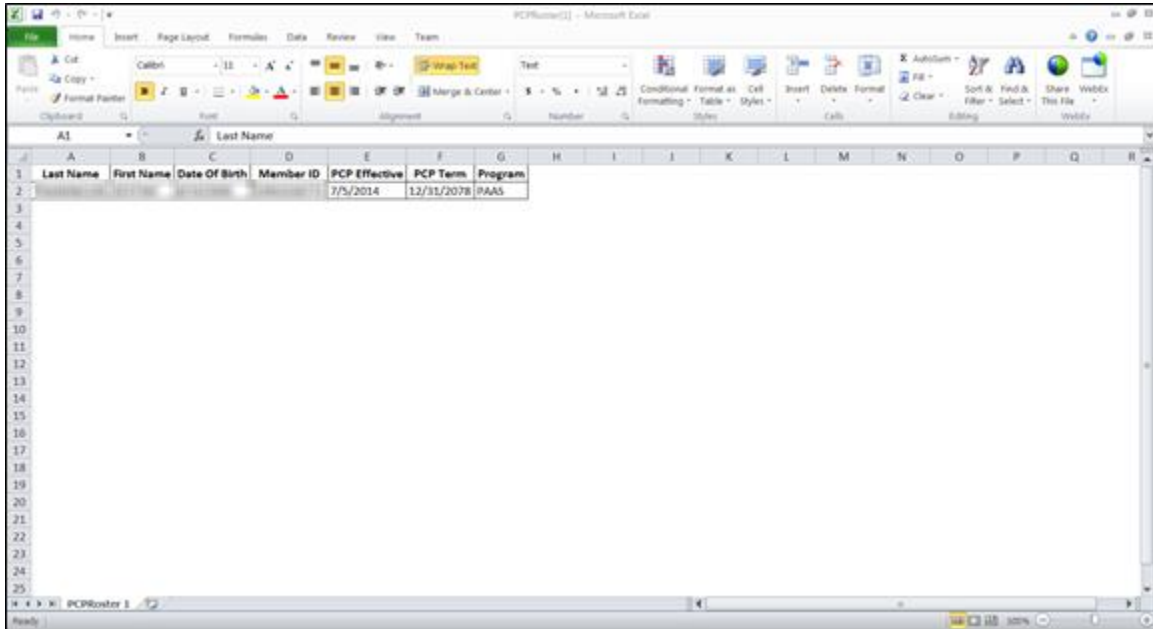


Figure 2–9: PCP Roster Excel Spreadsheet

3.2 *Print the PCP Roster*

To print a PCP Roster List, follow these steps:

1. Navigate to the PCP Roster. Click the **Print List** hyperlink. *Refer to Figure 2–10.*



Figure 2–10: Print List Hyperlink

2. A Portable Document Format (PDF) version of the PCP Roster List displays. Click the **Print** icon. *Refer to Figure 2–11.*

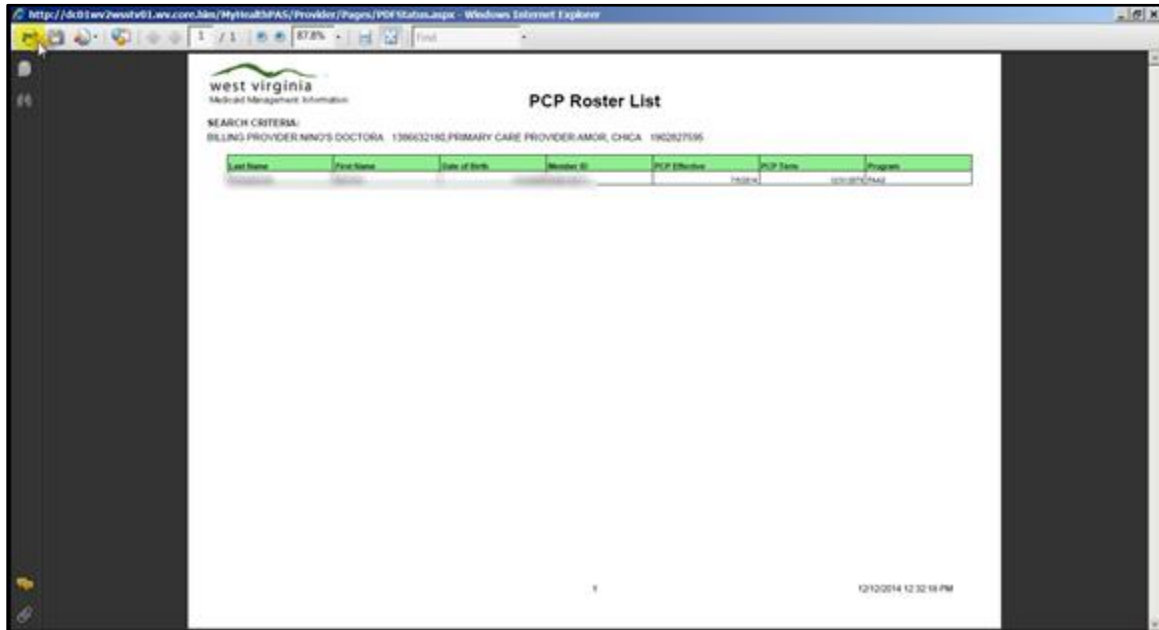


Figure 2–11: PCP Roster List PDF

4. PCP Roster Functions

From the PCP Roster, you can do the following functions:

- View Member Details
- View Electronic Health Records
- Verify Member Eligibility
- Claims Submission

4.1 *View Member Details*

The **View Member Details** function allows you to view a member’s demographic and enrollment information. To view the member details, click the **Last Name** hyperlink of the member you want to view. *Refer to Figure 3–1.*



Figure 3–1: Last Name Hyperlink

The member’s demographic and enrollment information displays. *Refer to Figure 3–2.*

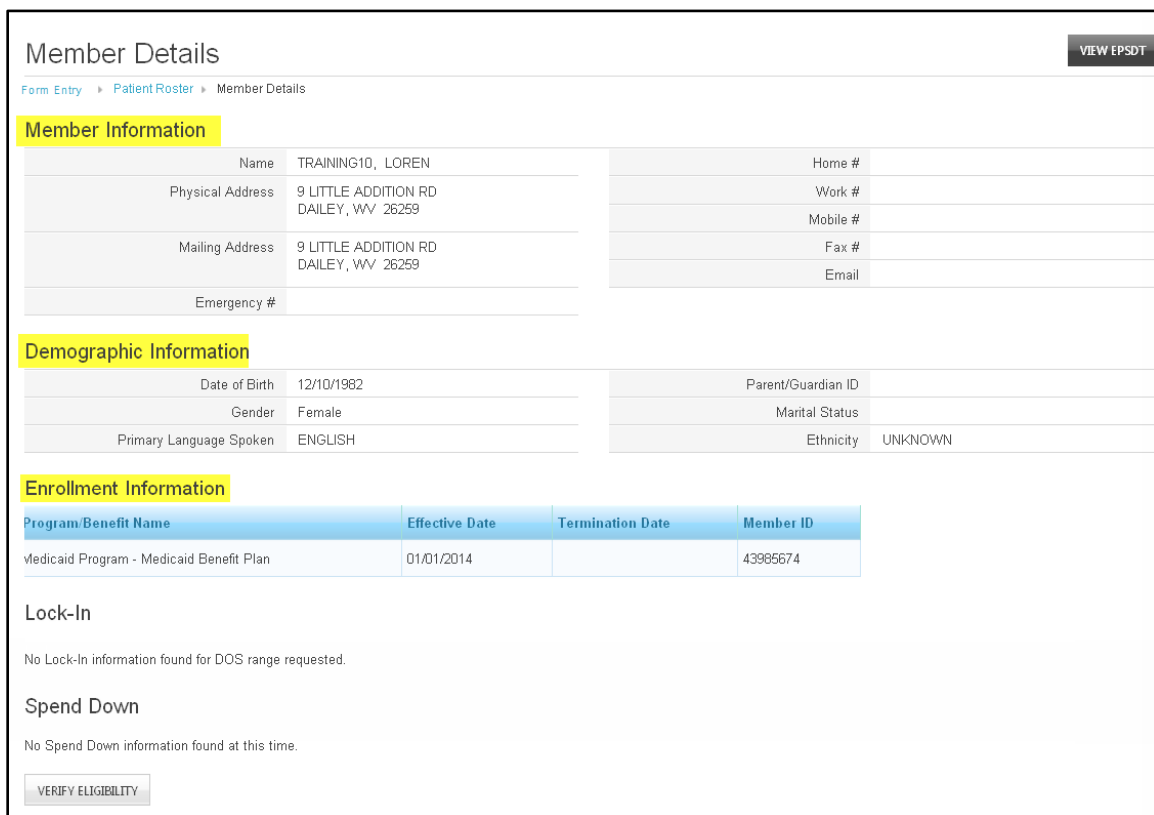


Figure 3–2: Member Details Window

4.2 View Electronic Health Record

The **View Electronic Health Record** function provides a way to view a member’s Electronic Health Record. To view a member’s Electronic Health Record, follow these steps:

1. Navigate to the **PCP Roster List**. Click the radio button next to the name of the member who is Electronic Health Record you want to view.
2. The buttons below the PCP Roster become active. Click **ELECTRONIC HEALTH RECORD**. Refer to **Figure 3–3**.

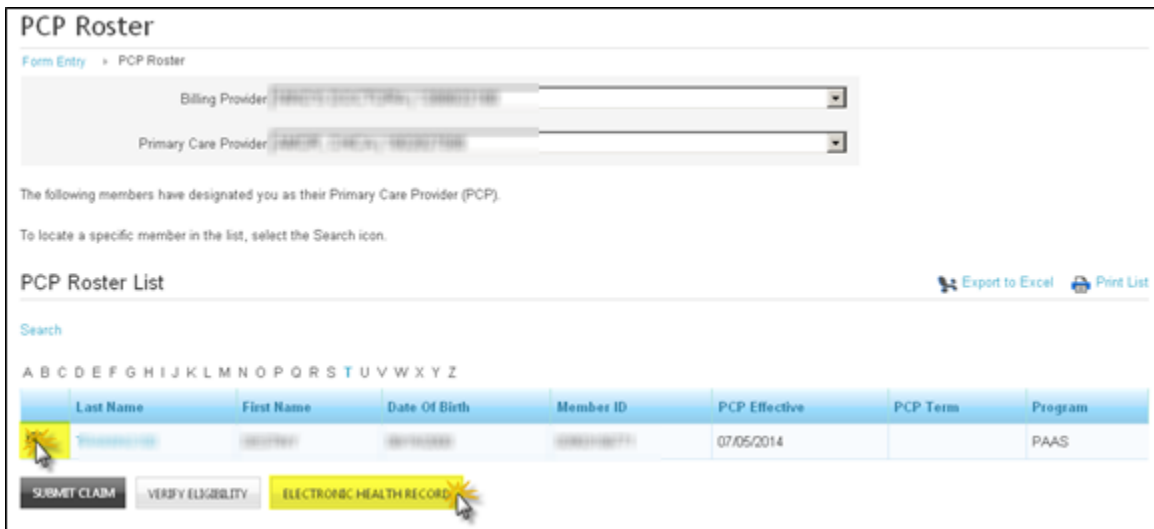


Figure 3–3: Electronic Health Record Button

3. The member’s Electronic Health Record displays in a new window. Refer to **Figure 3–4**.

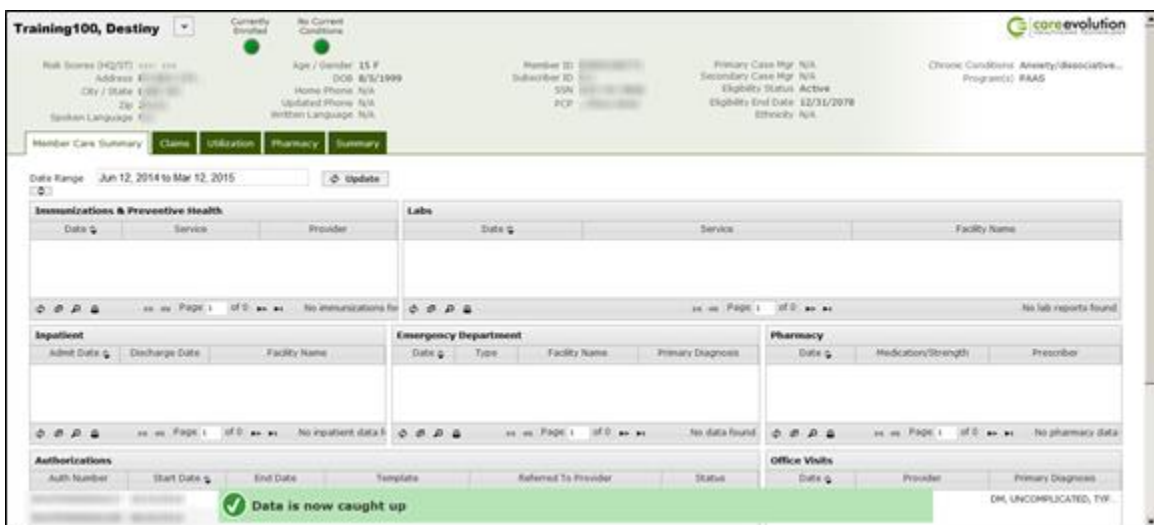


Figure 3–4: Electronic Health Record

4.3 Verifying Member Eligibility

1. **Verify Eligibility** – Refer to the [West Virginia Trading Partner Account Eligibility Verification User Guide](#) for detailed entry information. Refer to **Figure 4-5**.

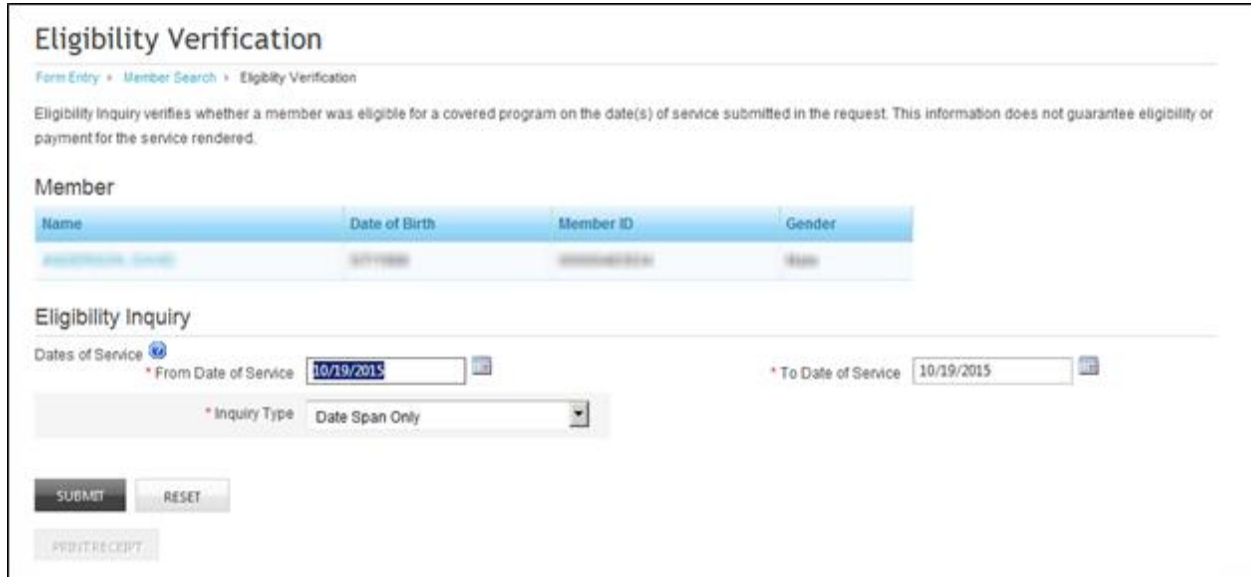


Figure 4-5: Verify Eligibility

4.4 Claims Submission

1. **Submit Claim** – Refer to the [West Virginia Trading Partner Account Claim Submission User Guide](#) for detailed entry information. Refer to **Figure 4-6**.

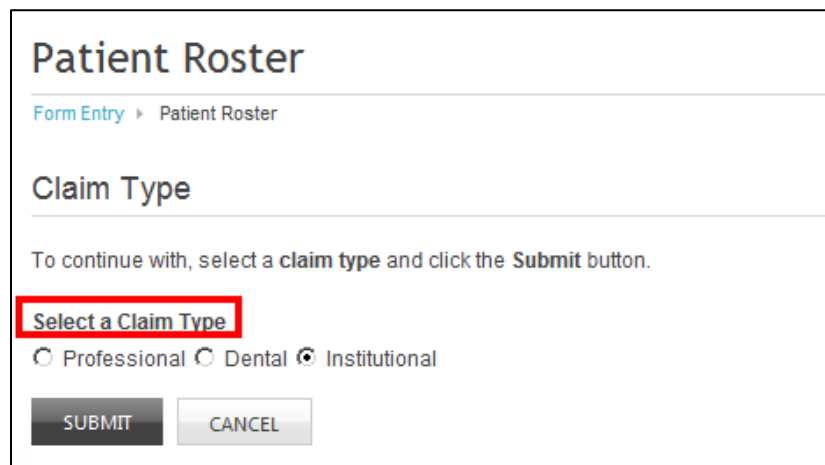


Figure 4-6: Submitting a Claim

Appendix A – Acronyms and Abbreviations

Acronym	Definition
ARRA	American Recovery and Reinvestment Act of 2009
CFR	Code of Federal Regulations
HIPAA	Health Insurance Portability and Accountability Act of 1996
ID	Identifier/Identification
MMIS	Medicaid Management Information System
PCP	Primary Care Provider
PDF	Portable Document Format
PHI	Protected Health Information

End of Documentation