

*West Virginia Trading Partner Account
Patient Roster User Guide*

Date of Publication: 11/23/2019

Document Version: 0.6

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Revision History

Version	Date	Author	Action/Summary of Changes	Status
0.1	01/12/2016	Katie Banik	Initial Creation	
0.2	11/23/2018	Katie Banik	Updated	
0.3	01/21/2019	Katie Banik	Rebranded	
0.4	10/23/2019	Debbie Schiller	Updated content through RQ_WV00026585 WV Health PAS-Online - MHP 2.36. Replaced blurry and outdated screenshots. Included Electronic Health Record access through Patient Roster to those providers who are set up to receive. Updated per enhancements because of HPER 82. WV CM.102 - Provide web form for providers to submit patient Early and Periodic Screening, Diagnosis, and Treatment (EPSDT) data.	
0.5	10/30/2019	Kate Miller	First QA Completed.	
0.6	11/20/2019	Tisjauna Palmer	Final QA	
0.7	10/21/2021	Katie Banik	Gainwell Rebranding CR34960	

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1. Introduction

This user guide is provided for all trading partners with a patient roster, who use the West Virginia (WV) Healthcare Payer Administration Solution (Health PAS)-Online Web portal. The Patient Roster is a tool that will help the user manage the patient's Medicaid account electronically. The web portal system permits real-time completion of healthcare transactions over the Internet.

To create a patient roster, providers must be signed into their trading partner account (provider portal) at www.wvmmis.com.

2. Patient Roster

The patient roster, or list of Medicaid members, can be customized to individual billing providers. Three advantages of creating a Patient Roster are to submit a claim directly from the Patient Roster screen, verify a member’s eligibility, and those providers who are eligible receive Electronic Health Record information utilize that tool.

To create a **Patient Roster**, follow these steps:

1. Click the **View Patient Roster** link found in the **Form Entry** options. *Refer to Figure 2-1.*

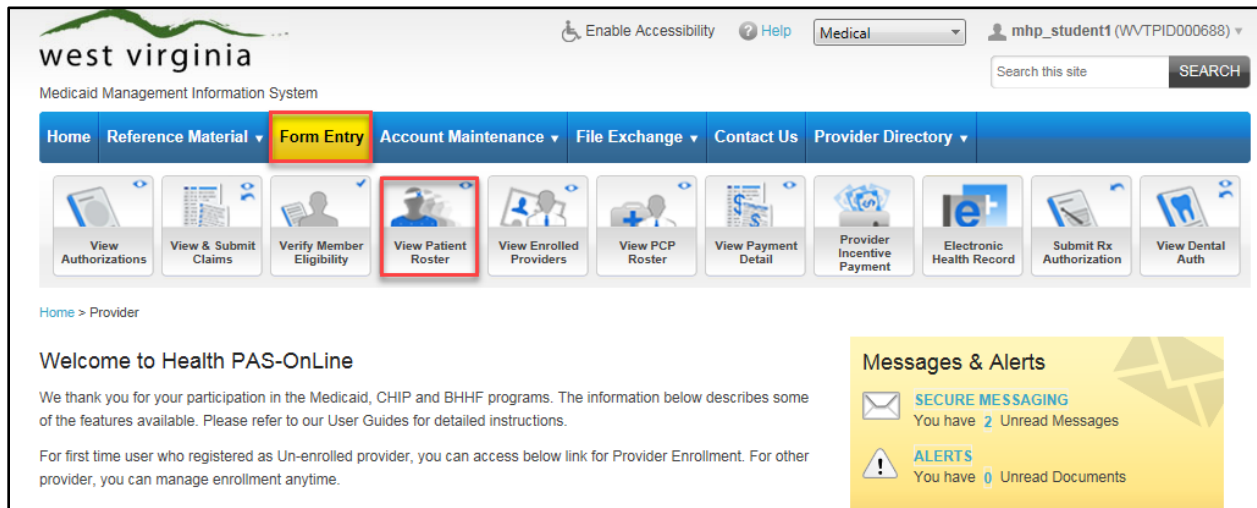


Figure 2-1: Accessing the Patient Roster

2. In the **Billing Provider** drop-down list, click the name of the billing provider. *Refer to Figure 2-2.*

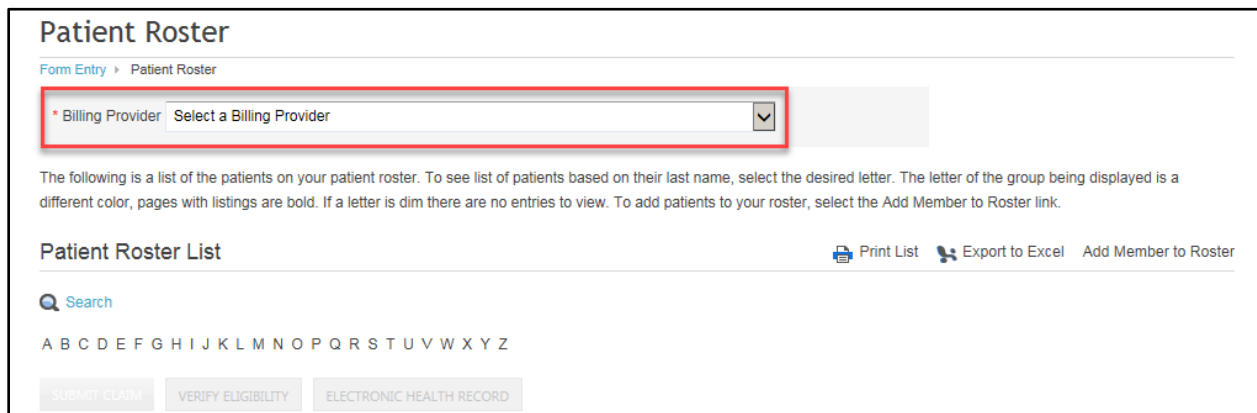


Figure 2-2: Patient Roster

3. The **Patient Roster** displays a list of participants sorted alphabetically by last name. Refer to **Figure 2-3**. The roster lists the following information:

- Last Name
- First Name
- Date of Birth
- Member (Participant) ID

2.1 Search for a Member in the Patient Roster

There are several ways to search for a specific member: click the **Search** hyperlink, click one of the highlighted letters found on the alphabet bar to search by last name, or use the **Next** button to search by page. Refer to **Figure 2-3**.

You can change results from 10-14 per page using Show drop-down arrow.

Patient Roster

Form Entry > Patient Roster

* Billing Provider: BIGGS, SYLVESTER | 1423279813

The following is a list of the patients on your patient roster. To see list of patients based on their last name, select the desired letter. The letter of the group being displayed is a different color, pages with listings are bold. If a letter is dim there are no entries to view. To add patients to your roster, select the Add Member to Roster link.

Patient Roster List [Print List](#) [Export to Excel](#) [Add Member to Roster](#)

[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	Member ID	
<input type="radio"/>	TRAINING10	LOREN	12/10/1982	43985674	
<input type="radio"/>	TRAINING102	WILLIAM	02/21/1934	518880204	
<input type="radio"/>	TRAINING121	BRADLEY	04/14/2000	00902787166	
<input type="radio"/>	TRAINING281	EDDIE	11/03/1943	00500849700	
<input type="radio"/>	TRAINING300	JONATHAN	09/08/2003	20873016916	
<input type="radio"/>	TRAINING301	WULFRIC	11/20/2012	00304350111	
<input type="radio"/>	TRAINING303	PATTY	11/04/2004	00100596815	
<input type="radio"/>	TRAINING304	ROSE	11/01/2012	00504333400	
<input type="radio"/>	TRAINING306	JACKSON	11/13/2012	00104324885	
<input type="radio"/>	TRAINING311	KIRK	04/04/2005	00304335493	

First Page Previous Page 1 of 3 [Next](#) Show 10 rows per page

[SUBMIT CLAIM](#) [VERIFY ELIGIBILITY](#) [ELECTRONIC HEALTH RECORD](#)

Figure 2-3: Search Member

1. To search for a specific member, click the **Search** hyperlink. Refer to **Figure 2-4**.



Figure 2-4: Search Hyperlink

2. In the **Find** field, enter the full or partial name.
3. Click **OK** to display a list of potential matches Refer to **Figure 2-5**.

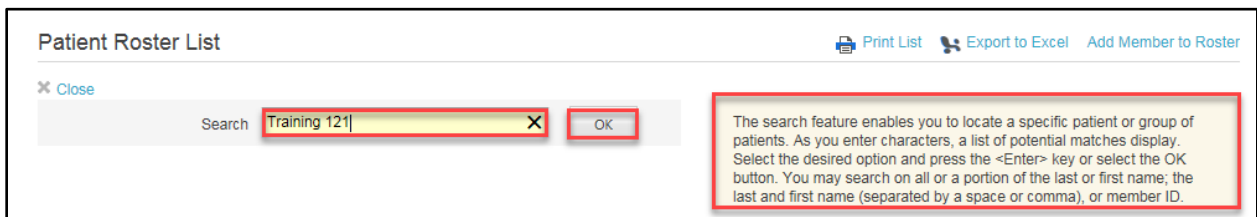


Figure 2-5: Find Member

4. Review the search results. Click the radio button next to the appropriate member to activate the **SUBMIT CLAIM**, **VERIFY ELIGIBILITY**, and **ELECTRONIC HEALTH RECORD** buttons. Buttons are reviewed in section 2.5, 2.6, and 2.7 below. Refer to **Figure 2-6**.

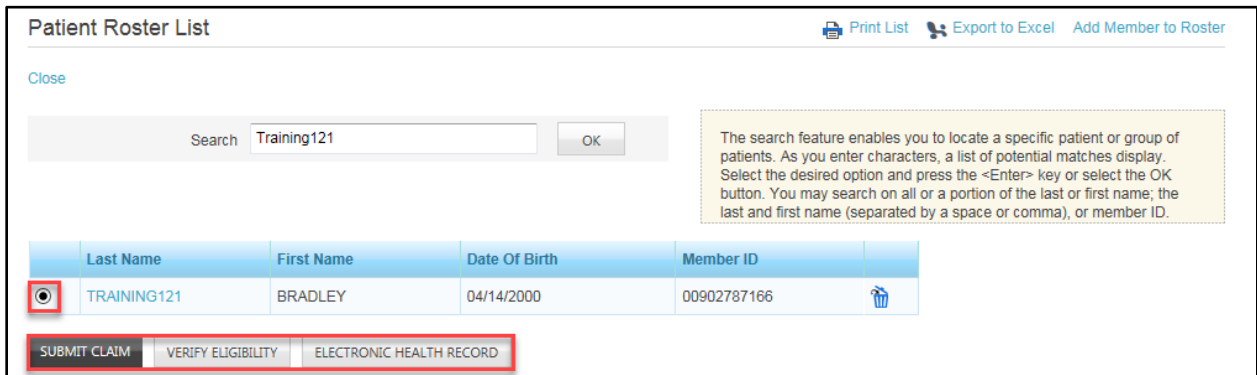


Figure 2-6: Search Results

5. Click last name hyperlink to access the member record. The **Member Details** page displays. Refer to **Figure 2-7**.

Patient Roster List Print List Export to Excel Add Member to Roster

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	Member ID	
<input type="radio"/>	TRAINING10	LOREN	12/10/1982	43985674	
<input type="radio"/>	TRAINING102	WILLIAM	02/21/1934	518880204	
<input type="radio"/>	TRAINING121	BRADLEY	04/14/2000	00902787166	
<input type="radio"/>	TRAINING281	EDDIE	11/03/1943	00500849700	
<input type="radio"/>	TRAINING300	JONATHAN	09/08/2003	20873016916	
<input type="radio"/>	TRAINING301	WULFRIC	11/20/2012	00304350111	
<input type="radio"/>	TRAINING303	PATTY	11/04/2004	00100596815	
<input type="radio"/>	TRAINING304	ROSE	11/01/2012	00504333400	
<input type="radio"/>	TRAINING306	JACKSON	11/13/2012	00104324885	
<input type="radio"/>	TRAINING311	KIRK	04/04/2005	00304335493	

First Page Page of 3 Show rows per page

Figure 2-7: Viewing Member Details

- The Member Details display where you can review member details, verify eligibility, return to the **Patient Roster** window, or view EPSDT records. *Refer to Section 2.6 Verifying Member Eligibility. Refer to Figure 2-8.*

- Refer to the [WV Trading Partner Account Eligibility Verification User Guide](#) for details on eligibility verification.
- Refer to the [WV Trading Partner Account Electronic Health Record User Guide](#) for details on viewing a member's EPSDT record.

Member Details

BACK TO PATIENT ROSTER

VIEW EPSDT

Form Entry > Patient Roster > Member Details

Profile

Name	TRAINING10, LOREN	Home #	
Email		Work #	
Physical Address	9 LITTLE ADDITION RD DAILEY, WV 26259	Mobile #	
Mailing Address	9 LITTLE ADDITION RD DAILEY, WV 26259	Fax #	
		Emergency #	

Demographic Information

Date of Birth	12/10/1982	Marital Status	
Gender	Female	Primary Language Spoken	ENGLISH
Parent/Guardian ID		Ethnicity	UNKNOWN

Enrollment Information

Program/Benefit Name	Effective Date	Termination Date	Member ID
Medicaid Program - Medicaid Benefit Plan	10/30/2014		43985674

Other Insurance

Plan	Plan Type	Policy Type	Policy #	Group #	Status	Carrier Name	Coverage Status	Effective Date	Termination Date
COB Comprehensive	Comprehensive		NO POLICY		Primary	COB Carrier	Active	01/01/2014	

PCP / Medical Home

No PCP / Medical Home Details were found for this member.

Copay

Member is copay exempt

Lock-In

No Lock-In information found for DOS range requested.

Spend Down

No Spend Down information found at this time.

VERIFY ELIGIBILITY

Figure 2-8: Viewing Member Details

2.2 Print List

Print List allows you to print a list of all patients entered into the Patient Roster.

1. Click **Print List** hyperlink. Refer to **Figure 2-9**.

Patient Roster

[Form Entry](#) > Patient Roster

* Billing Provider: BIGGS, SYLVESTER | 1423279813

The following is a list of the patients on your patient roster. To see list of patients based on their last name, select the desired letter. The letter of the group being displayed is a different color, pages with listings are bold. If a letter is dim there are no entries to view. To add patients to your roster, select the Add Member to Roster link.

Patient Roster List
[Print List](#)
[Export to Excel](#)
[Add Member to Roster](#)

[Close](#)

Figure 2-9: Print List hyperlink

2. Click **Print** icon found in left upper corner to print Patient Roster List created. Refer to **Figure 2-10**.

Patient Roster List

SEARCH CRITERIA:
BILLING PROVIDER: BIGGS, SYLVESTER 1423279813

Last Name	First Name	Date Of Birth	Member ID
TRAINING10	LOREN	12/10/1962	43985674
TRAINING102	WILLIAM	02/21/1934	518880294
TRAINING121	BRADLEY	04/14/2000	00902767166
TRAINING201	EDDIE	11/03/1943	00000448700
TRAINING300	JONATHAN	09/09/2003	30873016916
TRAINING301	WULFRIC	11/03/2012	00304356411
TRAINING303	PATTY	11/04/2004	00100506815
TRAINING304	ROSE	11/01/2012	00504335400
TRAINING306	JACKSON	11/13/2012	00104324800
TRAINING311	KIRK	04/04/2006	00304336400
TRAINING314	DENNIS	06/27/2006	30338886210
TRAINING316	DEANTE	10/25/1998	00804231001
TRAINING322	DEVIN	10/02/2007	00804344003
TRAINING323	JOHN	01/24/1996	37539610014
TRAINING325	KENDRICK	09/07/2010	00804344001
TRAINING326	EVIN	02/02/1998	00404083007
TRAINING328	DENEGGIS	01/01/2013	00304348400
TRAINING329	CYNTHIA	07/19/1998	003021030400
TRAINING331	CATHERINE	09/27/2000	30755372615
TRAINING332	AHMET	02/04/2001	37100666700
TRAINING333	NOLAN	06/23/2013	00904044305
TRAINING335	MARY	01/05/2002	00703666010

Figure 2-10: Print Patient Roster List

2.3 Export to Excel

Export to Excel allows you to create an Excel spreadsheet of all patients entered into the Patient Roster.

1. Click **Export to Excel** hyperlink. Refer to **Figure 2-11**.

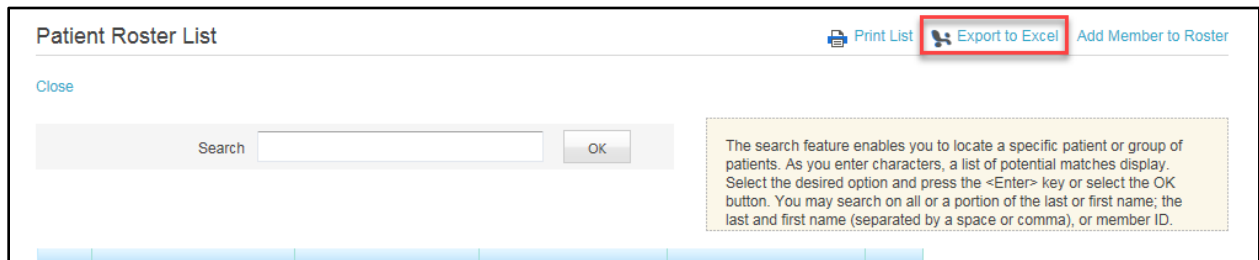


Figure 2-11: Export to Excel hyperlink

2. Click **Open**, **Save**, or **Cancel** to continue to the Excel spreadsheet. Refer to **Figure 2-12**.



Figure 2-12: Open, Save, or Cancel Export to Excel

3. The spreadsheet is created and available to utilize as necessary. Refer to **Figure 2-13**.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Last Name	First Name	Date Of Birth	Member ID								
2	TRAINING10	LOREN	12/10/1982	43985674								
3	TRAINING102	WILLIAM	2/21/1934	518880204								
4	TRAINING121	BRADLEY	4/14/2000	00902787166								
5	TRAINING281	EDDIE	11/3/1943	00500849700								
6	TRAINING300	JONATHAN	9/8/2003	20873016916								
7	TRAINING301	WULFRIC	11/20/2012	00304350111								
8	TRAINING303	PATTY	11/4/2004	00100596815								
9	TRAINING304	ROSE	11/1/2012	00504333400								
10	TRAINING306	JACKSON	11/13/2012	00104324885								
11	TRAINING311	KIRK	4/4/2005	00304335493								
12	TRAINING314	DENNIS	6/27/2006	20338886210								
13	TRAINING316	DIONTE'	10/25/1998	00604231051								
14	TRAINING322	DEVIN	10/2/2007	00804344023								
15	TRAINING323	JOHN	1/24/1999	37526610214								
16	TRAINING325	KENDRICK	9/7/2010	00804344031								
17	TRAINING326	EVIN	2/2/1998	00404083307								
18	TRAINING328	GENESIS	1/1/2013	00804349483								
19	TRAINING329	CYNTHIA	7/19/1998	00001038433								
20	TRAINING331	CATHERINE	8/27/2000	20755372615								
21	TRAINING332	AHMET	2/4/2001	37166998708								
22	TRAINING333	NOLAN	8/23/2013	00904044205								
23	TRAINING335	MARY	1/5/2002	00703699810								

Figure 2-13: Patient Roster Excel sheet

2.4 Add Member to the Patient Roster

1. To add a member to the Patient Roster, click **Add Member to Roster**. Refer to **Figure 2-14**.

Patient Roster List Print List Export to Excel **Add Member to Roster**

Close

Search

The search feature enables you to locate a specific patient or group of patients. As you enter characters, a list of potential matches display. Select the desired option and press the <Enter> key or select the OK button. You may search on all or a portion of the last or first name; the last and first name (separated by a space or comma), or member ID.

Figure 2-14: Add Member to Roster

2. Search for the member by entering the member’s information. Refer to **Figure 2-15**. You have to use two of the following items to search; click **SUBMIT**.

- Member ID
- Name (Last and First)
- Date of Birth
- Social Security Number

Add New Member

Form Entry > Patient Roster > Add New Member

Find Member

Member ID

Last Name First Name

Date of Birth

Social Security Number

Figure 2-15: Find Member

3. Click the check box in front of the member's name, and then click **ADD TO ROSTER**. Refer to **Figure 2-16**.

Add New Member

Form Entry > Patient Roster > Add New Member

Find Member

Member ID

Last Name First Name

Date of Birth

Social Security Number

Member List

	Last Name	First Name	Member ID	Effective Date	Expiration Date
<input checked="" type="checkbox"/>	TRAINING314	DENNIS	20338886210	7/01/2015	12/31/2078

Figure 2-16: Add to Roster

4. To delete a participant from the roster, click the radio button found to the left of the patient's name.

- Click the **Trash Can** icon found in the member row of the patient to delete participant from the roster. *Refer to Figure 2-17.*

	Last Name	First Name	Date Of Birth	Member ID	
<input checked="" type="radio"/>	TRAINING10	LOREN	12/10/1982	43985674	

Figure 2-17: Trash Can Icon

- A message from the webpage displays confirming that you truly wish to delete the patient’s record.
- Click **OK** to delete or click **Cancel** to cancel the request. *Refer to Figure 2-18.*

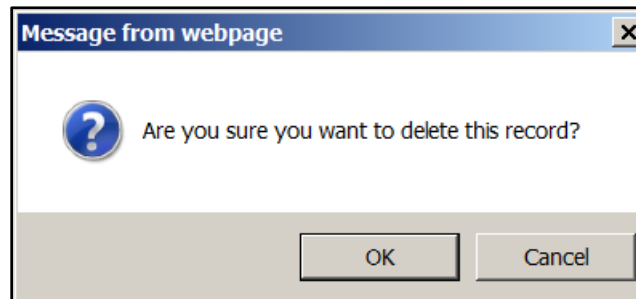


Figure 2-18: Message from Webpage Patient Roster Activities

Users can submit a claim, verify member eligibility, or review Electronic Health Records through the Patient Roster form entry function. The following section describes how each of the functions is performed.

- Click radio button found in front of patient’s last name. This activates the functions below.
- Select **SUBMIT CLAIM**, **VERIFY ELIGIBILITY**, or **ELECTRONIC HEALTH RECORD** button to access patient appropriate form entry function. *Refer to Figure 2-19.*

Patient Roster

Form Entry > Patient Roster

* Billing Provider: BIGGS, SYLVESTER | 1423279813

The following is a list of the patients on your patient roster. To see list of patients based on their last name, select the desired letter. The letter of the group being displayed is a different color, pages with listings are bold. If a letter is dim there are no entries to view. To add patients to your roster, select the Add Member to Roster link.

Patient Roster List [Print List](#) [Export to Excel](#) [Add Member to Roster](#)

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	Member ID	
<input checked="" type="radio"/>	TRAINING314	DENNIS	06/27/2006	20338886210	
<input type="radio"/>	TRAINING316	DIONTE'	10/25/1998	00604231051	
<input type="radio"/>	TRAINING322	DEVIN	10/02/2007	00804344023	
<input type="radio"/>	TRAINING323	JOHN	01/24/1999	37526610214	
<input type="radio"/>	TRAINING325	KENDRICK	09/07/2010	00804344031	
<input type="radio"/>	TRAINING326	EVIN	02/02/1998	00404083307	
<input type="radio"/>	TRAINING328	GENESIS	01/01/2013	00804349483	
<input type="radio"/>	TRAINING329	CYNTHIA	07/19/1998	00001038433	
<input type="radio"/>	TRAINING331	CATHERINE	08/27/2000	20755372615	
<input type="radio"/>	TRAINING332	AHMET	02/04/2001	37166998708	

First Page [Previous](#) Page 2 of 3 [Next](#) Show 10 rows per page

SUBMIT CLAIM **VERIFY ELIGIBILITY** **ELECTRONIC HEALTH RECORD**

Figure 2-19: Submit Claim or Verify Eligibility

2.5 Submitting a Claim



SUBMIT CLAIM – Refer to the *West Virginia Trading Partner Account Claim Submission User Guide* for detailed entry information. Selecting **SUBMIT CLAIM** takes you to the Form Entry View and Submit Claim functionality. Refer to **Figure 2-20**.

Patient Roster
Form Entry > Patient Roster

Claim Type

To continue with, select a claim type and click the Submit button.

Select a Claim Type

Professional Dental Institutional Copy Last Claim Use Template  

SUBMIT CANCEL

Figure 2-20: Submit Claim

2.6 Verifying Member Eligibility

Verify Eligibility – Refer to the *West Virginia Trading Partner Account Eligibility Verification User Guide* for detailed entry information. Selecting the **Verify Eligibility** button takes user to the Eligibility Verification window. Refer to **Figure 2-21**.


Eligibility Verification
Form Entry > Patient Roster > Eligibility Verification



Eligibility Inquiry verifies whether a member was eligible for a covered program on the date(s) of service submitted in the request. This information does not guarantee eligibility or payment for the service rendered.


Member

Name	Date of Birth	Member ID	Gender
TRAINING314, DENNIS	6/27/2006	20338886210	Male

Eligibility Inquiry

Dates of Service 

* From Date Of Service  * To Date Of Service 

* Inquiry Type 

SUBMIT **RESET**

PRINT RECEIPT

Figure 2-21: Verify Eligibility

2.7 Viewing Electronic Health Record

Viewing Electronic Health Record – Refer to the *West Virginia Trading Partner Electronic Health Record User Guide* for detailed entry information. Selecting the **ELECTRONIC**

HEALTH RECORD button will take you into the Member Electronic Health Record window. Refer to **Figure 2-22**.

✍ Functionality only available to providers set up to access Electronic Health Records through the portal.

The screenshot displays the 'Member Electronic Health Record' interface. At the top, there is a 'PRINT MEMBER SUMMARY' button. Below this, patient information is shown: 'Demo, Janis', '13 yrs 10 mos, Female', 'DOB: 08/04/2005', and 'Member ID: [REDACTED]'. The interface is divided into two main sections: 'Known Chronic Diseases' and 'Current Enrollment in Care/Case Management'. Both sections contain a table with columns for diagnosis/enrollment details and 'Last DOS', but both are currently empty, displaying 'No records found.'. Below these sections are tabs for 'All', 'EPSDT', 'Dental', 'Preventive Health', and 'Waiver'. The 'All' tab is selected, leading to a 'Timeline' view. The timeline includes a search bar with 'Date of Service' fields set to '06/25/2017' and '06/25/2019', and 'SEARCH' and 'RESET' buttons. A legend identifies icons for Hospital (green), Emergency Room (yellow), Office (black), and Medication Claim (red). The timeline itself shows a grid of months from July to May, with colored bars indicating events. On the left side of the timeline, there are expandable categories: '+ Diagnoses', '+ Services', '+ Medications', and '+ Providers'. A vertical sidebar on the far left lists various history categories: 'Diagnosis History', 'Emergency Room', 'Service History', 'Hospital Visits', 'Office Visits', 'Medications', 'Vaccination', 'Vitals', 'Lab/Rad/Screen', 'Equipment', 'Care Notification', 'Authorizations', and 'Transportation Service'.

Figure 2-22: Viewing Electronic Health Record

Appendix A – Acronyms and Abbreviations

Acronym	Definition
ARRA	American Recovery and Reinvestment Act 2009
CFR	Code Federal Regulations
EDI	Electronic Data Interchange
EPSDT	Early and Periodic Screening, Diagnosis, and Treatment
HIPAA	Health Insurance Portability and Accountability Act (1996)
HPAS	Healthcare Payer Administration Solution
ID	Identifier/Identification
MMIS	Medicaid Management Information System
PDF	Portable Document Format
PHI	Protected Health Information
WV	West Virginia

End of Documentation