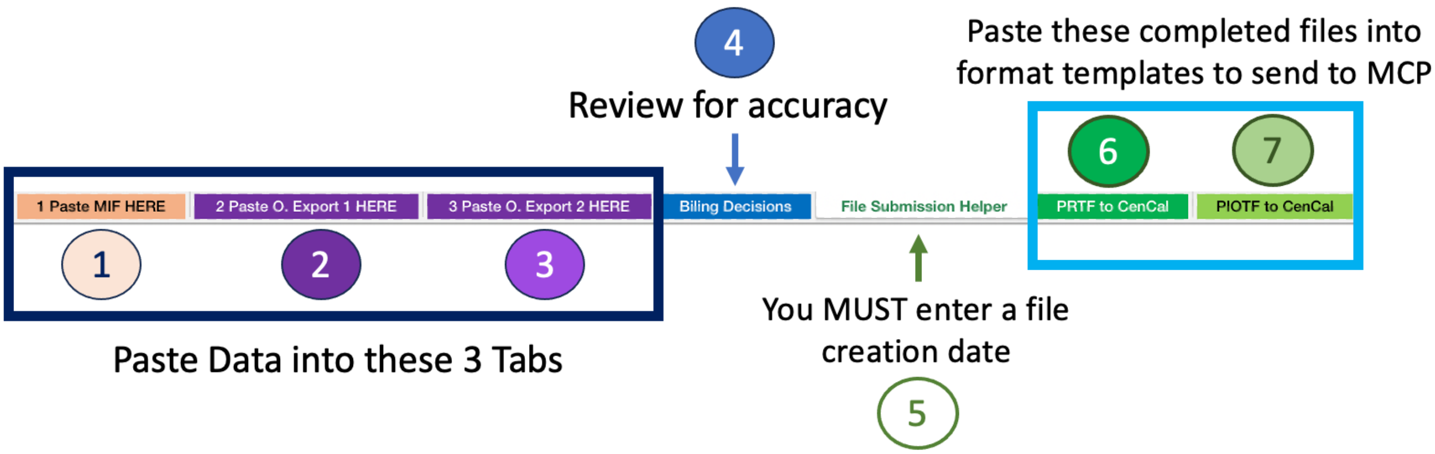
PRTF/POITF Translator Instructions



Summary:

1. Paste data from the MIF and two Octavia exports into tabs 1-3.
2. Complete Billing Decisions tab 4.
3. Use the File Name Submission helper.
4. Filter and copy CIN's from Billing Decisions into the PIOTF tab.

Transfer your completed PRTF and PIOTF to formatted templates and send securely to CenCal. Be sure to use a secure HIPAA transfer method.

"PASTE SPECIAL > VALUES"

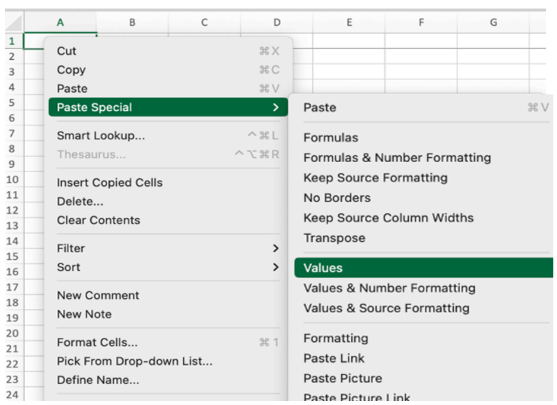
vs.

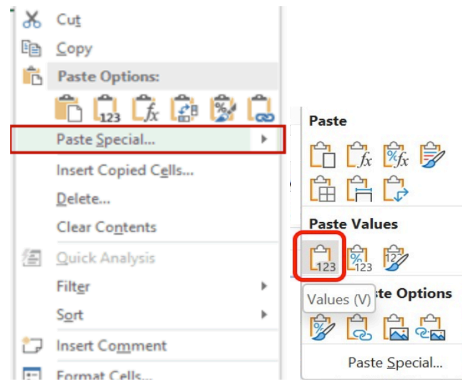
"PASTE"

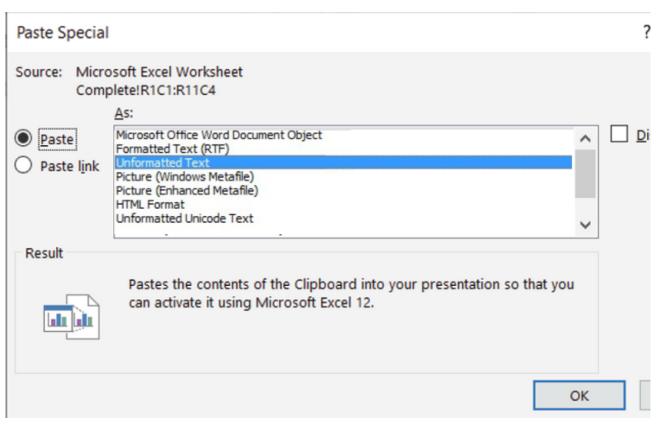
These are NOT the same! Be sure to notice the instructions.

{The following pages provide step-by-step instruction.}

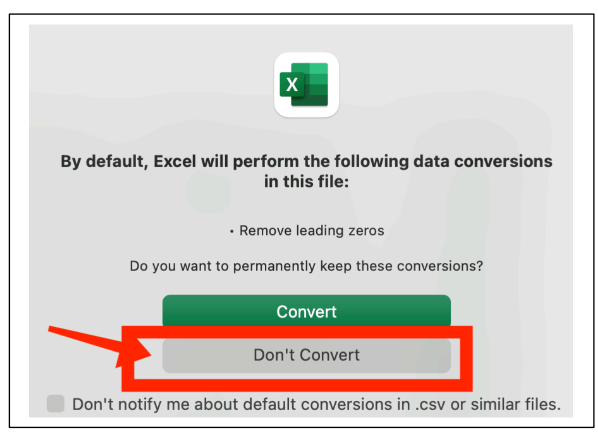
Excel has various types of Paste Special > Values. You may see any or all of these in your version of Excel.







NOTE: When given an option to convert, select "Don't Convert"



1 Paste MIF HERE

Step 1: Get the MIF(s) for your reporting period.

STEP 2: COPY the MIF (figure 1)

STEP 3: Paste MIF into Tab 1 of the Translator Tool. Use Paste Special Values. (figure 2)

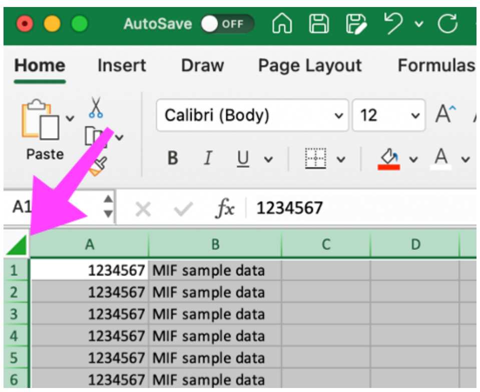


FIGURE 1: Click on the triangle to highlight the contents of the entire MIF. The entire sheet should turn grey.

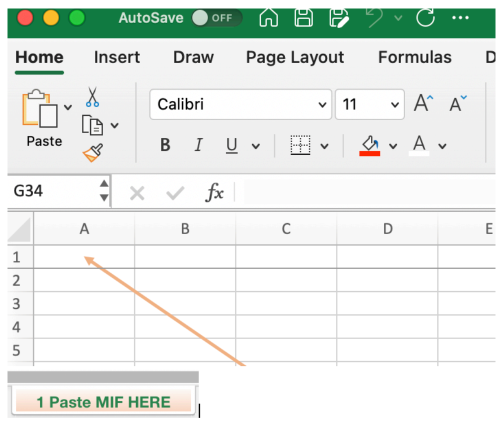


FIGURE 2: Paste Special Values into cell A1 of Tab 1

IMPORTANT: If there is > 1 MIF for the reporting period, you must paste the most recent data at the TOP.

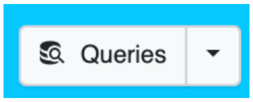
Always paste your MIFs into Tab 1 in reverse order (newest to oldest).

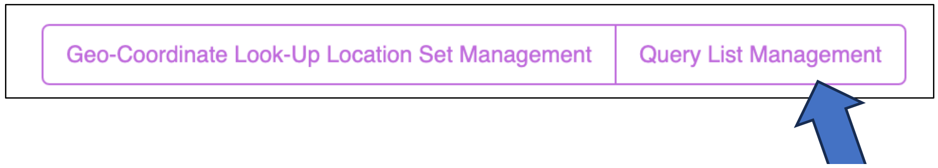
Max: 500 rows

STEP 4: COPY column A of the pasted MIFs (CIN numbers)

2 Paste O. Export 1 HERE

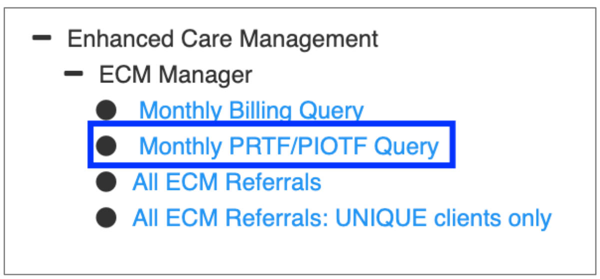
STEP 1: PASTE column A of the MIFs into your query lookup list



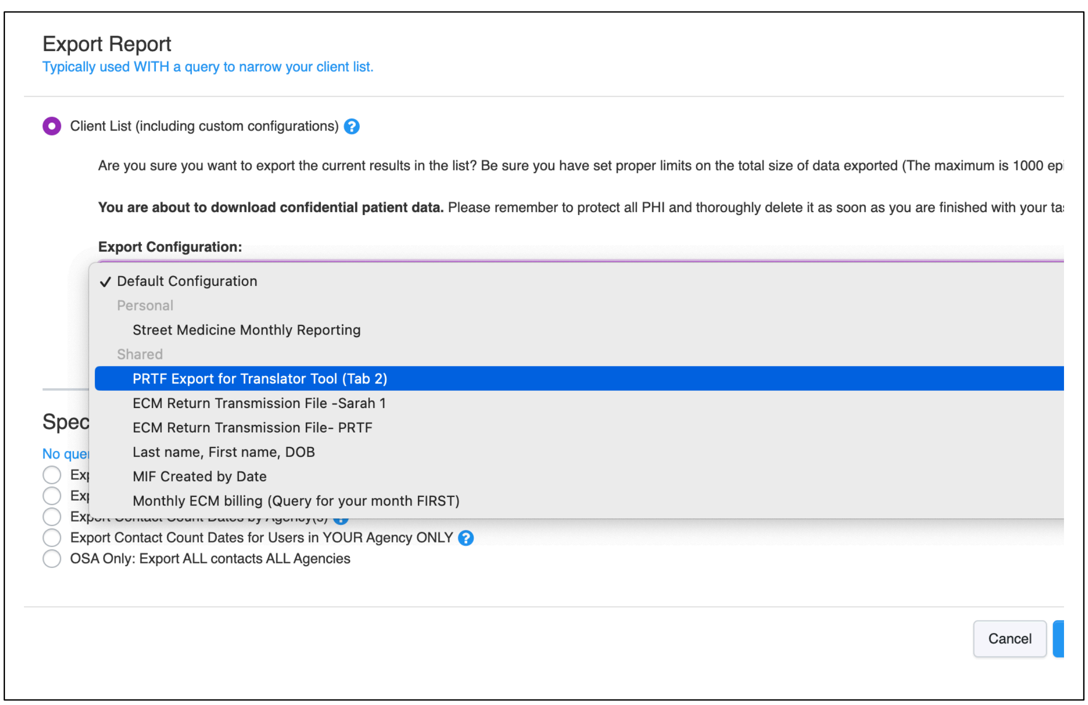


"MIF CIN Import List"

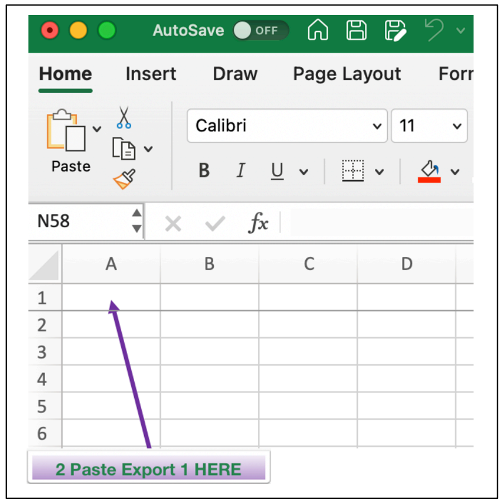
STEP 2: Query "Monthly PRTF/PIOTF Query"



STEP 3: Export "PRTF Export for Translator Tool"

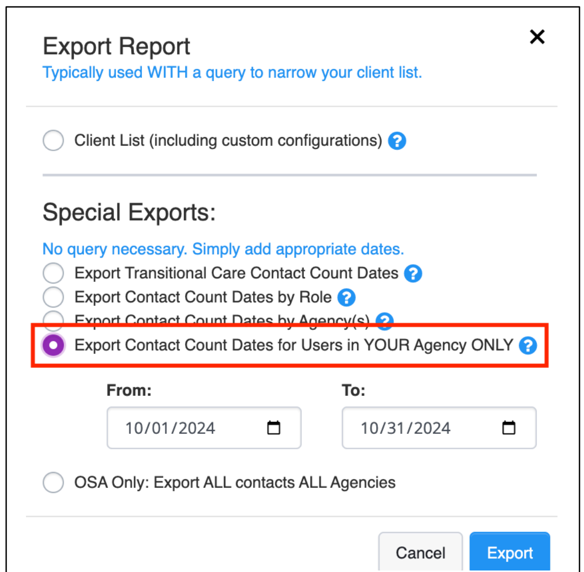


STEP 4: COPY the exported report and paste the export into cell A1 of Tab 2.
Use Paste Special Values.



3 Paste O. Export 2 HERE

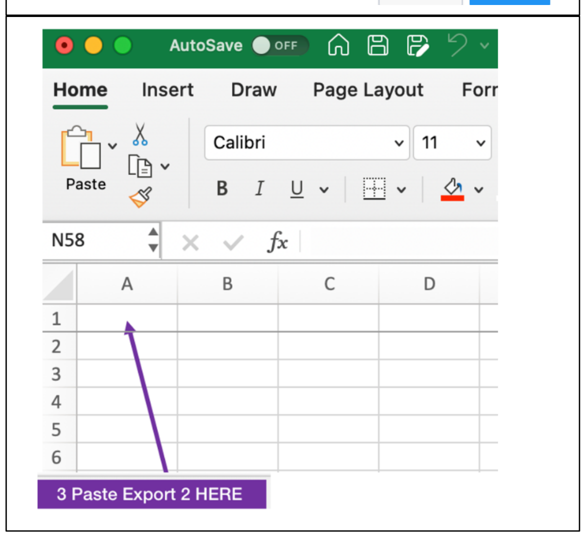
STEP 1: Use Special Export



"Export Contact Count Dates by your Agency only"

USE THE SAME DATE RANGE AS the MIFs

STEP 2: COPY the exported report and paste the export into cell A1 of Tab 3.
Use Paste Special Values.



4 Biling Decisions

- If a client is enrolled (status 3), they should have a benefit start/end date.
  - You can manually add dates in columns G & H if needed.
- If a client has discontinuation code, they should be enrolled in ECM (status 3).
- Review assigned LCMs. If needed, refer to the # of contacts per navigator.

Navigators	Activity Counts (open [+] ^^ for more)
1|A.Smith	1|3
1|A.Smith	1|3
1|A.Smith 2|B.Jones 3|D.Hall 4|E.Cole	1|3 2|5 3|4 4|3

This indicates that:
Navigator 1 has 3 counts
Navigator 2 has 5 counts
Navigator 3 has 4 counts
Navigator 4 has 3 counts

5 File Submission Helper

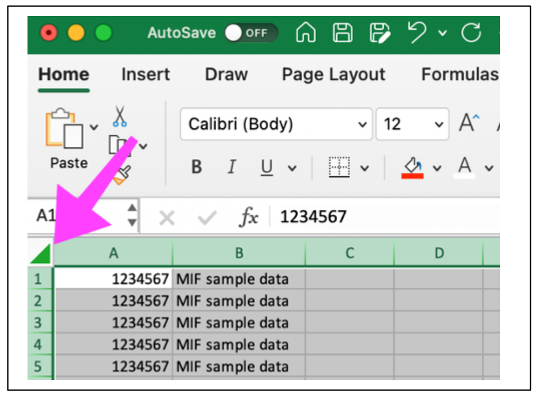
You must complete this step to have your PRTF creation date filled in correctly. Follow the instructions on the sheet. Simply fill in the highlighted fields.

- Select PRTF or PIOT
- Enter the month and year of this report period ***This should match the date range on the MIF and the dates you used for your 2 export reports.
- Enter the date of this report (usually TODAY). **MM/DD/YYYY**
- Copy the GREY version of the file name
- Paste Special Values into the cell indicated

6 PRTF to MCP

Your PRTF is complete. It currently contains FORMULAS. You will use the "pRtf-TEMPLATE" to remove the formulas and ADD formatting.

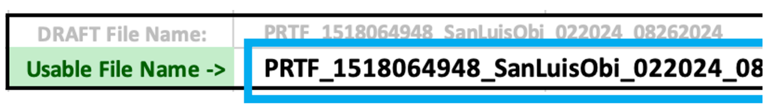
STEP 1: COPY the data from this sheet.



STEP 2: Paste Special Values into the pRtf-TEMPLATE for formatting.

STEP 3: **SAVE AS** the file name created in the File Submission Helper.

5 File Submission Helper



7 PIOTF to CenCal

To prepare the PIOTF, you will revise tabs 4 (billing decisions) & 5 (file submission helper).

STEP 1: Go back to Billing Decisions.

A. Column M: If a client has a Member Engagement Status of 1 (pending), 4 (declined) or 5 (excluded), they are highlighted red to indicate "should this client have an assigned Lead Case Manager?" Use the drop-down menu to select NA or an LCM name.

B. Lead Case Manager: Octavia can attempt to automatically fill in the LCM if there is only 1 LCM listed. Even so, that may not be correct, so please review for accuracy. Use the drop-down menu to modify.

C. Filter CIN Column: Uncheck "Blank" and "Not ECM" (see Figure 12)

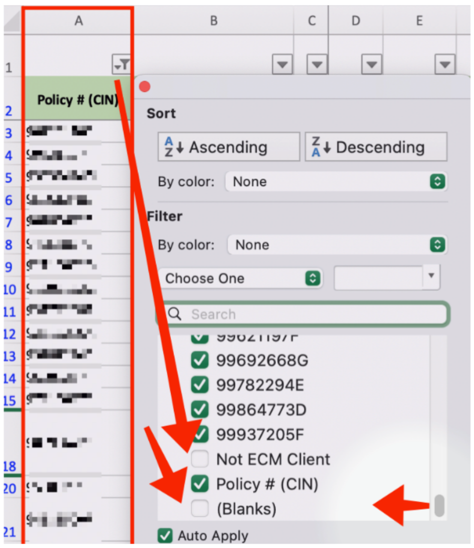


FIGURE 12: Filter column A

D. Filter LCM Column: Uncheck "Blank" and "N/A" (see Figure 13)

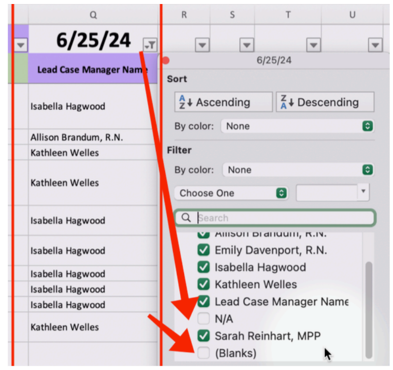


FIGURE 13: Filter column Q

The Billing Decisions sheet is now reduced to Clients whom you've determined HAVE HAD a contact within the reporting period.

E. Copy Column A of Billing Decisions (Figures 14 & 15)

Click your cursor here to highlight the entire Column A

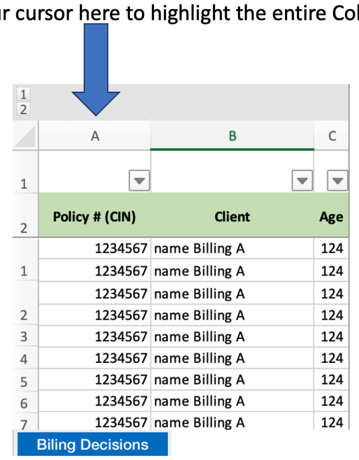


FIGURE 14: Copy Column A of Billing Decisions

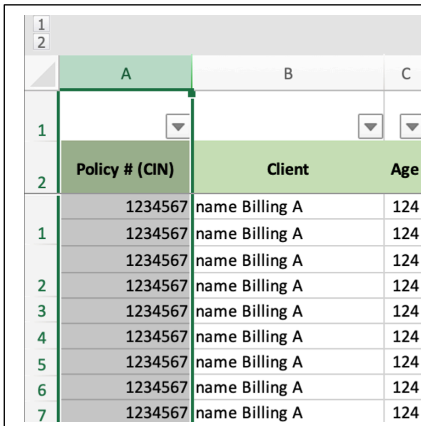


FIGURE 15: When done correctly, the column header (A) and the entire column is highlighted in green.

STEP 2: Go back to PIOTF tab.

Paste into Column A in the PIOTF tab (Figures 16 & 17)

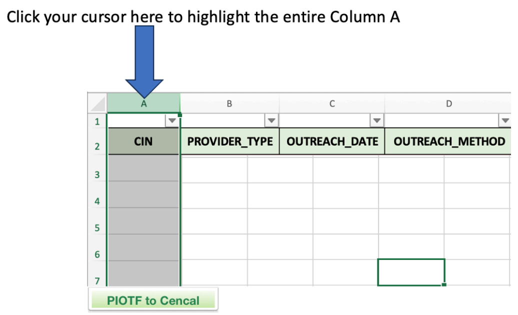


FIGURE 16: Select column A in the PIOTF tab. The header and column will be highlighted in green.

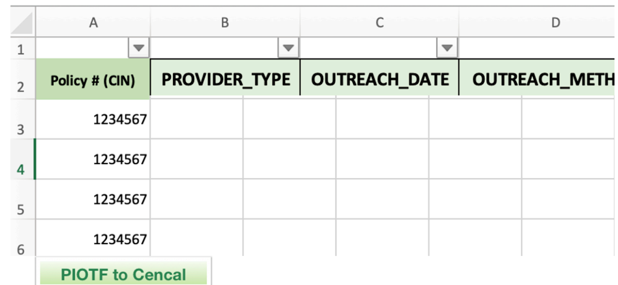


FIGURE 17: Paste into column A of the PIOTF

PRTF and PIOTF are complete

Copy the contents of each tab and "Paste Special" Values into clean spreadsheets to send to CenCal.

Clean up your Translator for next use.

A. Clear contents of Tabs 1-3. Never delete rows or columns!!!!!!

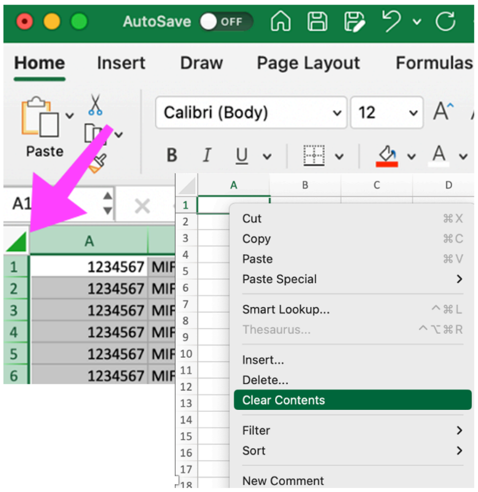
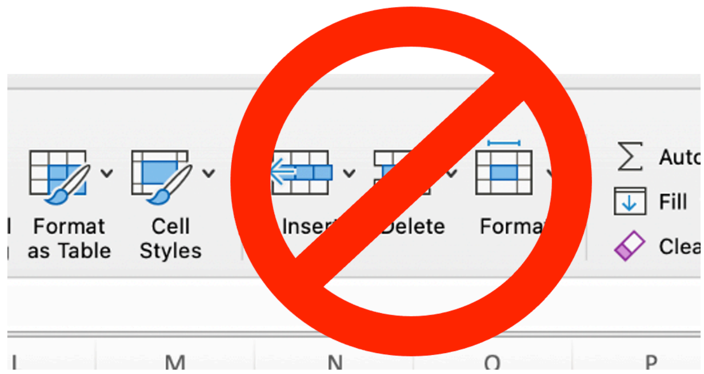


FIGURE 18
Click on the triangle to highlight ALL of the page contents and Clear Contents



NEVER DELETE ROWS OR COLUMNS

B. Clear filters (if you applied them to create the PIOTF) in Billing Decisions.

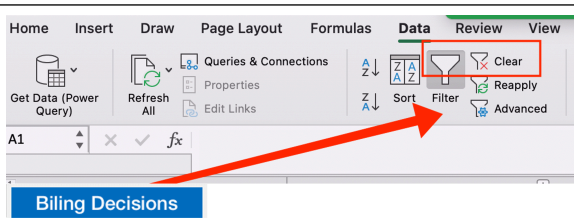


FIGURE 19: Clear filters