PRTF/PIOTF Translator IN-TOOL Instructions

IMPORTANT: IF you are pasting >1 MIF import for the month (creating a Super-MIF), then newest data needs to be at top. You can:

- Create Super-MIF in a separate draft Excel file (newest to oldest), then paste finished product here

OR

- Create Super-MIF in a separate draft Excel file & sort-ALL by the FILE_PRODUCTION_DATE

OR

- Paste the multiple MIFs here in reverse order (newest to oldest)

THEN Paste Special HERE. Do NOT sort data HERE in this Tool because Excel will simply reconnect formulas with the old sort pattern (not helpful).

1) Download MIF for the reporting month (from CenCal gateway site)

2) COPY all data from the MIF

3) HERE IN CELL A1 Paste: Special: Values ...

We have seen 6 variations of Paste Special (see examples if needed)

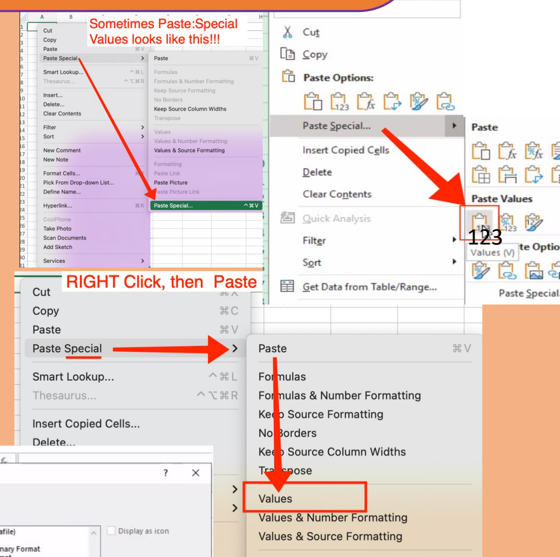
Max **750** rows per conversion

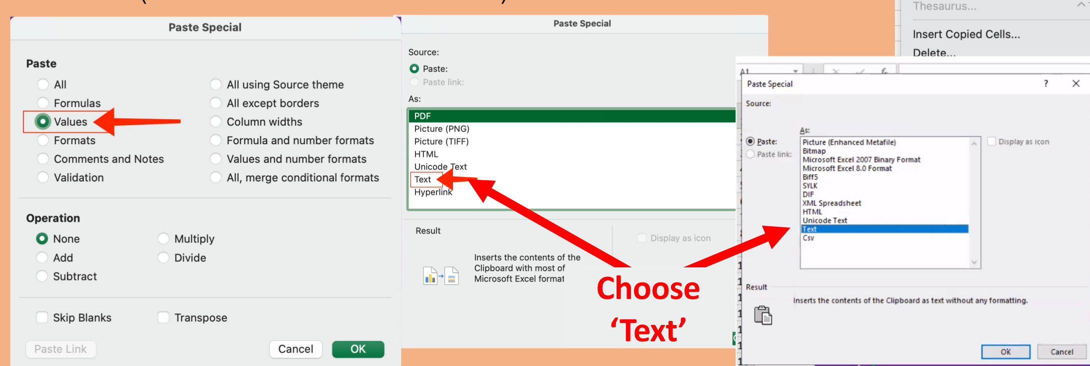
4) When DONE Either:

A) Simply close this Excel and do NOT save your changes

OR

B) Select All (corner above A1), then Right-Click and Clear Contents (Do NOT "Delete" rows or columns)

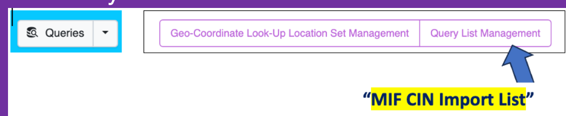




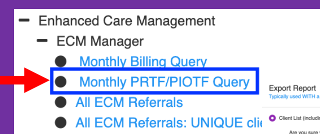
TAB 1

1) Copy the CIN numbers from Tab 1, column A.

2). On the Octavia Client List view, go to Queries > Query List Management. Edit the list “MIF CIN Import List” to include your CIN numbers from Tab 1.

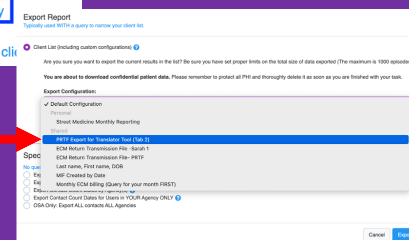


3). Run the query: "Monthly PRTF/PIOTF Query”



4). Export the results:

a. List Actions > Export
b. Choose Client List > “PRTF Export for Translator Tool (Tab 2)”
c. Copy the data from the Export



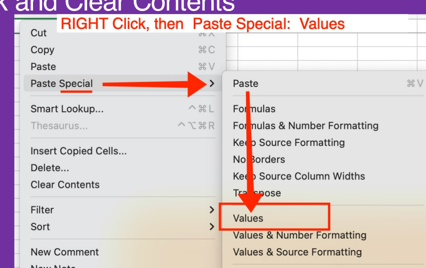
5). HERE IN CELL A1 Paste: Special: Values ...
Max 750 rows per conversion

6) When DONE Either:

A) Simply close this Excel and do NOT save your changes

OR

B) Select All (corner above A1), then Right-Click and Clear Contents
(Do NOT "Delete" rows or columns)



See Paste Special instructions on tab 1 if Paste Special Values looks different for you here

TAB 2

1) On the Octavia Client List view (NO query needed): "**Export Contact Count Dates by Agency(s)**"

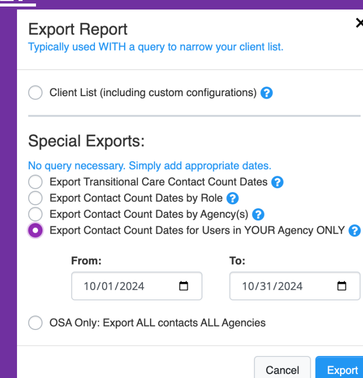
Steps:

A) Click the blue [List Actions] button and select "Export"

B) Select SPECIAL Exports: "**Export Contact Count Dates by YOUR Agency ONLY**"

C) **IMPORTANT:** Enter the dates of your report (should match the MIF dates in tab 1)

D) Click the blue [Export] button



2) HERE in Excel: Paste: Special: Values from above export into cell A1

Max 750 rows per conversion

3) When DONE Either:

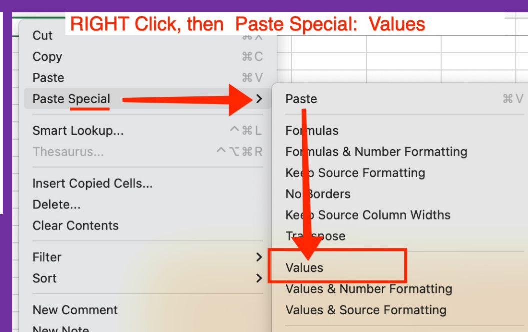
A) Simply close this Excel and do NOT save your changes

OR

B) Select All (corner above A1), then Right-Click and Clear Contents

(Do NOT "Delete" rows or columns)

See Paste Special instructions on tab 1 if Paste Special Values looks different for you here



No Query is needed for this export

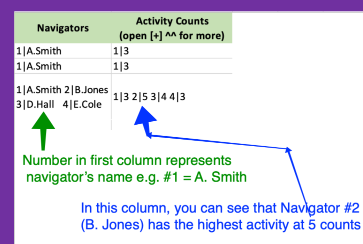
TAB 3

1) Fill out / complete ALL of Column **X (Lead Case Manager)**

How to read Navigator counts to decide who should be the LCM when contact counts are tied:

Note: "Activity Count" here
Is when the user answered "yes" to "Do you want to increase your Activity count…?" This is usually NOT the same as a contact (Tele Or IN-Person)

This does usually represent the navigator who spent the most time with the client.



2) Check for any errors in Column **V** (fix & **re-export** Octavia data if indicated)

TAB 4 Billing Decisions

1) Fill out GREEN Fields in Column J, K (and keep columns B – F up to date)

A) Select File type **PrTF or PioTF**

B) Enter Date

C) then Paste Special: Values into a fresh **PrTF or PioTF** Excel sheet

D) SAVE the new file with filename:

Per CenCal or "File Submission Helper" tab

Save as type .CSV

E) Send **securely** to CenCal

2) When Done, to reset this tool, either:

A) Simply close this Excel and do NOT save your changes

OR B) Delete the dates entered on THIS tab

Enhanced Care Management (ECM)

Data Sharing Quick Reference Guide (FORM G)

CenCal HEALTH
Local. Quality. Healthcare.

ECM Provider Return Transmission File To standardize and streamline key information that CenCal Health will most commonly require about Members from ECM Providers beyond information contained in billing and invoicing.	Yes	ECM Provider to CenCal Health	**Monthly** Last business week of the month	**Format:** PRTF_NPI_PROVIDER NAME_MMYYYY_ MMDDYYYY.csv
ECM Provider Initial Outreach Tracker File To standardize provider outreach reporting of the total number of both successful and unsuccessful initial outreaches to Members occurring by ECM Providers.	Yes	ECM Provider to CenCal Health	**Monthly** Last business week of the month	**Format:** PIOTF_NPI_PROVIDER NAME_MMYYYY_ MMDDYYYY.csv

TAB 5 File Submission Helper

1). After “Billing Decisions” and “File Submission Helper” tabs are completed:

- Copy all the of data in this sheet
- Paste into the PRTF Template
- Save the new sheet with the name you created in the “File Submission Helper” tab and save as .CSV
- Securely send to CenCal.

2). When DONE Either:

A) Simply close this Excel and do NOT save your changes

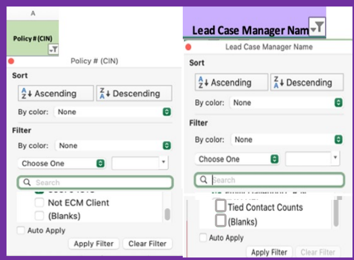
OR

B) Select All (corner above A1), then Right-Click and Clear Contents
(Do NOT "Delete" rows or columns)

TAB 7 PRTF to Managed Care Plan

1) On "Billing Decisions" Tab, **FILTER** data to:

A) Column A (CIN) NO Blanks, and No "Not ECM Client" [if present]
B) Column V (LCM) NO Blanks, and No   "N/A (Status …" [if present]
C) OPTIONAL - Filter Column Q by Member Engagement Code &/Or Column R by Discontinuation Code



2). THEN copy column A (CIN) from Billing Decisions and Paste Special into cell A1 of this sheet.

Max Rows **750**

3). To send the PIOTF to CenCal:

- Copy all of data in this sheet
- Paste into the PIOTF Template
- In “File Submission Helper” change cell J3 from PRTF to PIOTF.
- Save the new sheet with the name you created in the “File Submission Helper” tab and save as .CSV
- Securely send to CenCal.

4). When DONE Either:

A) Simply close this Excel and do NOT save your changes
OR
B) Select All (corner above A1), then Right-Click and Clear Contents
(Do NOT "Delete" rows or columns)

TAB 7 PIOTF to Managed Care Plan