

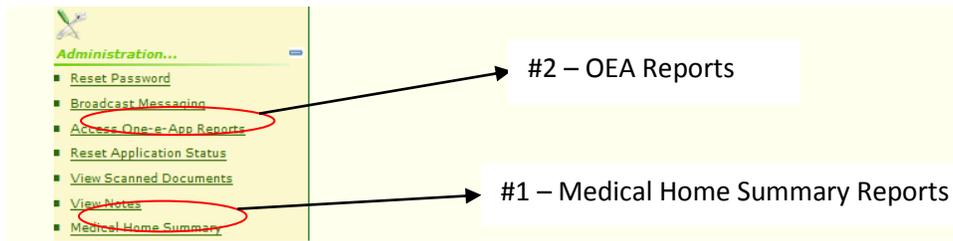
One-e-App (OEA) Tips Sheet – Medical Home Summary
Revised September 2015



The purpose of this OEA Tips Sheet is to provide you with information about the different types of reports in One-e-App, so that you can easily access information about your MHLA Participant's enrollment status, including your Participants that are coming up for renewal. This Tips sheet also provides information about an easy way to import this information into excel format.

What Types of Reports are Available in OEA?

OEA provides two types of data reports for Community Partners reflecting enrollment activities for the agency that can be accessed by the System Administrator from his/her home screen: 1) Medical Home Summary and 2) OEA Reports, which include the report referred to as "Program Metric Report".



1) **MEDICAL HOME SUMMARY** – The Medical Home Summary feature is the main data report that your System Administrator will use to access your list of enrolled participants. This link allows you to view the current MHLA enrollment status for all participants who have applied with your agency – whether they are enrolled, disenrolled, denied or pending. To access this information, click on the green Medical Home Summary link, shown above. The System Administrator can search for this information by site or agency-wide. They can search for participants by application disposition status: approved, pending, denied or disenrolled participants, and can pull up this information by site or across the entire agency. To access this information, do the following:

- A. Select your medical home site location.
- B. Select the disposition status (i.e., enrolled, disenrolled) and the date range you want to see.
- C. Click on View Summary to see the result.
- D.

A screenshot of the search form for the Medical Home Summary report. It includes a dropdown menu for 'Medical Home' (set to '----Select All----'), a dropdown menu for 'Disposition Status' (set to '----Select One----' with options: Approved, Denied, Disenrolled, Pending), and two date range fields labeled 'From' and 'To' with calendar icons. A 'View Summary' button is located at the bottom.

The resulting report will show the participant's Name, Date of Birth, Person ID, FPL%, OEA Eligibility Status, and Insurance Start Date. The report can be exported to Excel, for ease of sorting and review. See below:

Medical Home Summary

Participant Name	Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Disenrollment Date	Disenrollment Reason
			47.78	Approved	01/08/2015		
			102.09	Approved	10/08/2014		
			0.00	Approved	10/16/2014		
			52.41	Approved	11/20/2014		
			61.71	Approved	02/06/2015		
			58.81	Approved	03/18/2015		
			96.09	Approved	10/23/2014		
			96.09	Approved	10/23/2014		
			96.09	Approved	10/23/2014		
			96.09	Approved	10/23/2014		
			27.95	Approved	10/30/2014		
			54.16	Approved	12/05/2014		
			0.00	Approved	12/05/2014		
			47.27	Approved	01/08/2015		

How to read the Medical Home Summary: Below is some of the information you can pull out of the Medical Home Summary reports, and how to read it.

- A. Approved (Enrolled) Participant Summary.** The **Approved (Enrolled) Summary** provides a listing of all enrolled participants by agency or by individual Medical Home site. This report is updated in real time – that means that an enrolled, disenrolled, or re-enrolled participant will show up in the “proper” report immediately. The report will show the participant’s application record in the month **where the last activity took place**. This means that if a participant was enrolled September 14, 2014 the record will appear in the September report (date range: 9/1/2014 – 9/30/2014), until the application is either renewed or disenrolled. When a renewal takes place (example: August 15, 2015) the participant will no longer appear in September 2014 date range but in the August 2015 report. There, the participant’s eligibility dates will show the entire eligibility coverage period (example 9/14/14 – 9/13/16).

Why is the Enrolled Participant Summary showing a Disenrollment Date? Note that in the summary of Approved (Enrolled) Participant, you may see a disenrollment date (see below). This would appear if there was a *previous* application for a participant that was disenrolled, and subsequently re-enrolled. In this example, these participants were disenrolled in December 2014 and January 2015, but then re-enrolled in February 2015 and are now approved, effective on the date shown under the “Insurance Start Date” column. This person will **not** appear as a disenrollment report, because this participant is no longer disenrolled. (*Note: Future version of the system will remove ‘Disenrollment Date’ from this report, as some have considered it confusing historical information that is not relevant to the person’s current enrollment status*).

Participant Name	Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Disenrollment Date
			75.16	Approved	02/18/2015	12/30/2014
			79.69	Approved	02/18/2015	12/30/2014
			43.05	Approved	02/23/2015	01/23/2015
			43.05	Approved	02/23/2015	01/23/2015

- B. Disenrolled Participant Summary.** The **Disenrolled Summary** will show all disenrolled participants and the date(s) and reason(s) for their disenrollment. Below is an example screen shot.

Participant Name	Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Disenrollment Date	Disenrollment Reason
			125.84	Disenrolled	11/05/2014	11/14/2014	Incomplete Application

As described above, disenrolled participants who successfully re-enroll into the program will not appear in the disenrolled list, as their current status is “enrolled.”

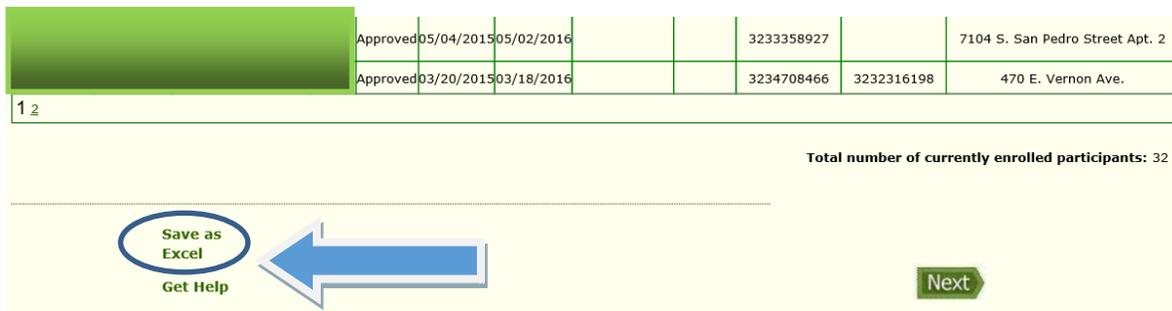
- C. **Denied Participant Summary** The **Denial Summary** will show all denied participants and the date(s) and reason(s) for their denial.

Note: Denial vs. Disenrollment: For dispositions that occur after April 1, 2015, a “denial” nullifies the person’s eligibility period, whereby a “disenrollment” (for any reason) means eligibility prospectively ends after the disenrollment date.

2. **ONE-E-APP REPORTS:** While the Medical Home Summary provides you with information on who is enrolled, the **OEA Reports** (comprised of the Program Metric, Program Demographics, and Application Statistical Reports) provide you with information on all of the individuals who are at various stages of the application process. The various EEA Reports reflect people who are enrolled, preliminarily eligible, not applying for aid, and referred to Medi-Cal. As the reports are currently laid out in OEA, it is not always obvious to the viewer which people are being counted in which report. The MHLA Program Office is working with SIS to make these reports more intuitive and user-friendly in the future, however they are difficult to interpret in their current form. As a result, we recommend that you utilize the Medical Home Summary Report to view up-to-date information about your enrolled, disenrolled and denied applicants.

How to Download the Medical Home Summary in Excel

Step 1: If your Medical Home Summary search result gives you a table of participants, One-e-App provides the option to export the list to Excel. You can click on the “Save as Excel” link below. The export will be in Excel XLS version.



The screenshot shows a table with two rows of participant data. The first row has columns for 'Approved' (05/04/2015), '05/02/2016', an ID (3233358927), and an address (7104 S. San Pedro Street Apt. 2). The second row has columns for 'Approved' (03/20/2015), '03/18/2016', an ID (3234708466), another ID (3232316198), and an address (470 E. Vernon Ave.). Below the table is a pagination control showing '1 2'. To the right of the table, it says 'Total number of currently enrolled participants: 32'. At the bottom, there are three buttons: 'Save as Excel' (circled in blue with a blue arrow pointing to it), 'Get Help', and 'Next'.

Approved	05/04/2015	05/02/2016	3233358927	7104 S. San Pedro Street Apt. 2
Approved	03/20/2015	03/18/2016	3234708466	3232316198 470 E. Vernon Ave.

1 2

Total number of currently enrolled participants: 32

Save as Excel
Get Help

Next

Step 2: You will receive the following pop-up message asking if you want to open or save the file. Save the file first, then open the file. You will then be able to use the Excel spreadsheet.



The screenshot shows a 'Save as Excel' pop-up dialog box. The dialog box has a title bar with 'Save as Excel' and 'Get Help' on the left, and a 'Next' button on the right. The main text of the dialog box asks: 'Do you want to open or save MedicalHomeSummary.xls from assistedoneeapp.org?'. Below the text are three buttons: 'Open', 'Save', and 'Cancel'. There is also a small 'x' icon in the bottom right corner of the dialog box.

Save as Excel
Get Help

Next

Do you want to open or save MedicalHomeSummary.xls from assistedoneeapp.org?

Open Save Cancel