

## One-e-App (OEA) Tips Sheet – Medical Home Summary

**Revised March 2016**



The purpose of this OEA Tips Sheet is to provide you with information about the Medical Home Summary Report in One-e-App so that you can easily access information about your MHLA Participants' enrollment status, including your Participants that are coming up for renewal. This Tips Sheet also provides information to import this information into Excel format.

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### **PART I: THE MEDICAL HOME SUMMARY REPORT: YOUR SOURCE FOR ENROLLMENT INFORMATION**

#### **MEDICAL HOME SUMMARY OVERVIEW**

The Medical Home Summary feature in One-e-App (OEA) is the report that your System Administrator should use to access your list of enrolled participants. This feature allows you to conduct a search to view the current MHLA enrollment status for all participants who have applied for MHLA through your agency – whether they are approved, disenrolled, denied or pending. You can search for the list of enrollees by site or agency-wide.

The resulting report (below) 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 in "How to Download the Medical Home Summary in Excel").

<b>Medical Home Summary</b>							
<b>Participant Name</b>	<b>Date of Birth</b>	<b>Person ID</b>	<b>FPL (%)</b>	<b>Status</b>	<b>Insurance Start Date</b>	<b>Disenrollment Date</b>	<b>Disenrollment Reason</b>
Charlie Byrd	01/01/1950	31900201000007157	47.78	Approved	01/08/2015		
Lola Olga Sola	05/05/1980	31900201000280146	102.09	Approved	10/08/2014		
Mario Moreno Cantinflas	07/06/1948	31900201003288142	0.00	Approved	10/16/2014		
Lamar Odom	01/01/1980	31900201007323140	52.41	Approved	11/20/2014		
Thomas Shelby	01/01/1975	31900201007036157	61.71	Approved	02/06/2015		
Rick Grimes	01/10/1974	31900201006067151	58.81	Approved	03/18/2015		
John Doe	12/01/1974	31900201019295149	96.09	Approved	10/23/2014		
Jane Doe	01/01/1975	31900201020295147	96.09	Approved	10/23/2014		
Jack Doe	01/01/1999	31900201021295145	96.09	Approved	10/23/2014		
Sue Doe	01/01/1997	31900201022295143	96.09	Approved	10/23/2014		
Sherman Peabody	09/07/1970	31900201023302142	27.95	Approved	10/30/2014		

#### **How to read the Medical Home Summary Report**

The following is a list of data that you can obtain through the Medical Home Summary reports, with additional information on how to read these reports.

- 1. Approved (Enrolled) Participant Summary.** The Approved (Enrolled) Summary provides a listing of all enrolled participants by agency or by clinic site. This report is updated in real time – meaning that an enrolled, disenrolled, or re-enrolled participant will show up in the "proper" report immediately. The report shows the participant's Person ID in the month where the most recent activity for the participant took place in the One-e-App system. For example, if a participant was

enrolled on September 14, 2015, their Person ID will appear in the Approved (Enrolled) Summary Report that includes September 2015. If a renewal occurs for this participant the following year (for example, this person renews on August 15, 2016) the participant will now begin appearing in the Approved (Enrolled) Summary Report that includes August 2016. It is also important to know that in the Approved (Enrolled) Summary, the participant’s eligibility dates will show their entire eligibility coverage period, beginning with their original enrollment date, (i.e. 9/14/15), and it will cease to appear in the Approved (Enrollment) Summary Report after their renewal end date, (i.e. 9/13/17).

**QUESTION: “Can I download an enrollment report that reflects my clinic’s historical enrollment from previous months?”**

**ANSWER:** No. As indicated above, the Approved (Enrollment) report is updated immediately as a person’s enrollment status changes in real time. This means that the OEA system will not allow a clinic to download a report that “looks back” in time to a previous month’s enrollment status. If you want to keep monthly enrollment reports, you will need to download your agency’s Medical Home Summary report each month and save it.

**QUESTION: “Why does the Approved Participant Summary show a “Disenrollment Date?”**

**ANSWER:** When you run a Medical Home Summary Approved report, you may see a disenrollment date listed in the last column (see below as an example). This appears when the participant had a *previous* application that was disenrolled, but then the participant subsequently re-enrolled. This does not mean that the participant is currently disenrolled. In the example below, these participants were disenrolled in December 2014 or 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 in the disenrollment report, because this participant is not currently disenrolled.

Participant Name	Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Insurance End Date	Disenrollment Date
Ron Burgandy	12/05/1983	31900201054212146	0.00	Approved	02/18/2015	02/17/2016	12/30/2014
Carmen Flores	12/07/1980	31900201099233146	118.83	Approved	02/18/2015	02/17/2016	12/30/2014
Socorro Tapia	09/20/1960	31900201150212142	27.72	Approved	02/23/2015	02/22/2016	01/23/2015
Ana Sundrakes	05/18/1970	31900201033211141	101.26	Approved	02/23/2015	02/22/2016	01/23/2015

**2. Disenrolled Participant Summary Report.** The Disenrolled Summary Report shows 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
Gerald Doghouse	02/20/1984	3190020105421332	84.00	Disenrolled	11/05/2015	11/14/2015	Incomplete Application

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

**3. Denied Participant Summary Report.** The Denial Summary Report 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 participant’s entire eligibility period, and a “disenrollment” means eligibility ends prospectively after the disenrollment date.

**NOTE: One-e-App “Canned” Reports:** The Program Metric, Program Demographic, and Application Statistical Reports in One-e-App (called “canned” reports) are of limited utility in their current form. The MHLA Program recommends utilizing the Medical Home Summary Reports as your source of enrollment information.

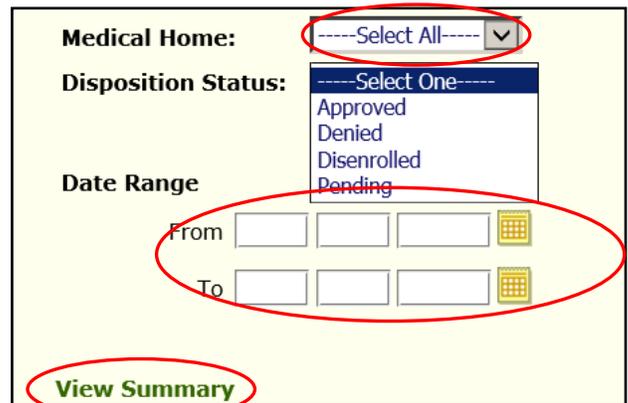
**PART II: HOW TO DETERMINE YOUR ENROLLMENT USING THE MEDICAL HOME SUMMARY REPORT**

The following information is intended to help you download the reports that you need in order to determine your agency’s enrollment totals. It also explains why there may be slight differences in the patient counts that appear in your Approved (Enrolled) Summary Report and the Remittance Advice (RA) totals that your agency receives every month as part of your Monthly Grant Funding (MGF). To identify a list of your approved participants for the most current complete month you will need to download two reports using the Medical Home Summary feature: **1) Approved** and **2) Disenrolled**. Follow the steps below.

- A. From the System Administrator dashboard, select the Medical Home Summary link.



- B. Select your medical home site location.
- C. Select the disposition status that you wish to view (i.e., approved, disenrolled) and the date range that you wish to see (additional instruction on how to do this is provided under “Downloading an Approved Report, below).
- D. Click “View Summary” to see the result of your query.



- 1. Downloading an Approved (Enrolled) Report:** To run a report on your approved participants, select a date range to cover a minimum of one year of time, ending with today’s date. This ensures that you will capture a complete MHLA enrollment cycle of 365 days, ending with all OEA activities to-date. In the example below, let’s assume today’s date is February 18, 2016 and you want to view who was enrolled last month (i.e. in January) that is currently enrolled. To do this, enter the first day of the month (last year) in the “From” section (i.e. 02/01/2015). Then enter *today’s* date in the “To” section (i.e. 02/18/2016). This will provide you with a list of everyone that is currently enrolled and the month that they enrolled. This is useful if you want to see who is due to renew.

We recommend downloading the report as an Excel file (instructions provided later in this Tips Sheet) and sorting this information using the “Filter” function under the “**Insurance Start Date**” column. Your report will now identify current enrollments by month.



Participant Name	Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Insurance End Date	Disenrollment Date
Mary Valeria Test	12/29/1983	31900201042212141	82.61	Disenrolled	1/30/2015	1/29/2016	1/29/2016
Miguel Test	06/22/1980	31900201043212149	82.61	Disenrolled	1/16/2015	01/15/2016	01/15/2016
Sam Lewis	11/21/1980	31900201087225141	0.00	Disenrolled	2/3/2015	02/02/2016	02/02/2016
Sharmaine Ruffa Gonzales	01/01/1990	31900201084229144	42.13	Disenrolled	1/30/2015	01/29/2016	01/29/2016
Lisa Delgadillo	01/01/2006	31900201149229145	34.15	Disenrolled	1/30/2015	01/29/2016	01/29/2016
Jose Garcia	11/15/1975	0	0.00	Disenrolled	1/29/2015	01/28/2016	01/28/2016

## 2. Downloading a Disenrollment Report:

To download a disenrollment report, select the date range for the entire month – in this example, From 01/01/2016, to: 01/31/2016. Look at the “Insurance End Date” column to identify all disenrollments that occurred during the month of January 2016.



Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Insurance End Date	Disenrollment Date	Disenrollment Reason
12/29/1983	31900201042212141	82.61	Disenrolled	1/30/2015	1/29/2016	1/29/2016	Did Not Complete Renewal
06/22/1980	31900201043212149	82.61	Disenrolled	1/16/2015	01/15/2016	01/15/2016	Did Not Complete Renewal
11/21/1980	31900201087225141	0.00	Disenrolled	2/3/2015	02/02/2016	02/02/2016	Did Not Complete Renewal
01/01/1990	31900201084229144	42.13	Disenrolled	1/30/2015	01/29/2016	01/29/2016	Did Not Complete Renewal
01/01/2006	31900201149229145	34.15	Disenrolled	1/30/2015	01/29/2016	01/29/2016	Did Not Complete Renewal
11/15/1975	0	0.00	Disenrolled	1/29/2015	01/28/2016	01/28/2016	Did Not Complete Renewal

3. **Approximating your MGF payments using the Enrollment and Disenrollment Reports.** In the MHLA Program, a participant who is disenrolled from the program retains their coverage through the end of the month that their eligibility ends. For example, if an enrollee’s renewal date is January 16, 2016 and they fail to renew their application and are disenrolled on January 17, 2016, they are still “covered” by the MHLA program through January 31, 2016. Clinics are paid Monthly Grant Funding (MGF) for that person for the month of their disenrollment. Therefore, to approximate your MGF payment for a given month (in this example - for January 2016), add your list of enrollees from your Approved (Enrolled) Report to the January 2016 list of your disenrolled Participants from the Disenrollment Report. This calculation will provide you with a very close approximation of your agency’s January 2016 enrollment.

**QUESTION:** “Why is there a difference between my Medical Home Summary Report (Approved and Disenrolled Combined) and my Monthly Grant Funding Remittance Advice”?

**ANSWER:** You may find a slight difference between your Medical Home Summary Report enrollment and your MFG Remittance Advice for the following reasons:

- **Transfers to/from other Medical Homes.** If a participant transfers from your agency to another agency during the month in question, that participant will not show up in either the Approved or in the Disenrollment Report for your agency (because One-e-App pulls data in real time). However, that enrollee will be included in your MFG Remittance Advice for that month because they were enrolled at your clinic at some point during the month.
- **MHLA Audit Disenrollments/Denials.** If the MHLA program disenrolls or denies an application as a part of a routine audit or upon request by the participant AFTER you have downloaded your reports, but PRIOR to the delivery of your MFG Remittance Advice, these enrollees may show up in your Medical Home Summary Report but will not be MGF payable.

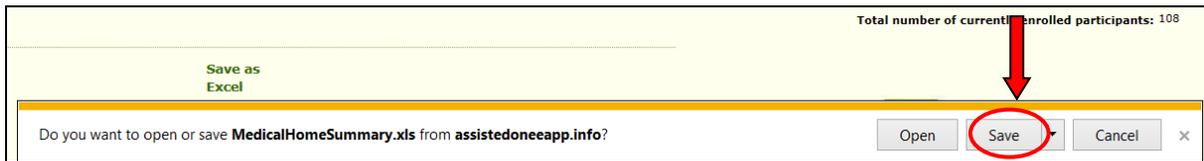
**NOTE:** Please refer to the next section, “Comparing your Medical Home Summary report with your Monthly Grant Funding Remittance Advice in Excel” for assistance in comparing your Medical Home Summary Report and MFG Remittance Advice.

### PART III: HOW TO DOWNLOAD THE MEDICAL HOME SUMMARY REPORT IN EXCEL

1. One-e-App provides the option to export any information from your Medical Home Summary reports into Excel. The first step, after running your report, is to click on the “Save as Excel” link below. The export will be in Excel XLS format.



2. You will then 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 be able to view the information as an Excel spreadsheet.



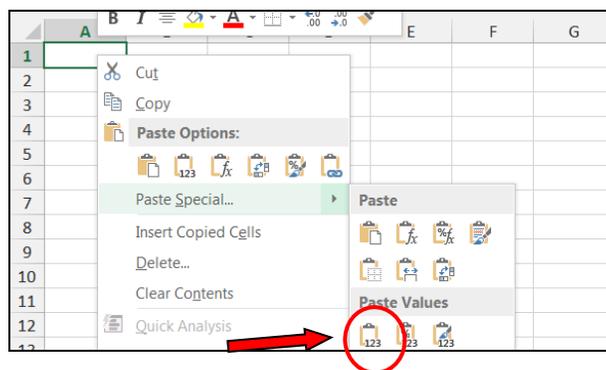
3. Once you’ve opened the Excel file, highlight and copy the entire list. Open a new sheet and paste the list in the new sheet.

The screenshot shows an Excel spreadsheet with a table of participant data. The table has columns: Date of Birth, Person ID, FPL (%), Status, Insurance Start Date, Insurance End Date, and Disenrollment Date. The data rows are as follows:

Date of Birth	Person ID	FPL (%)	Status	Insurance Start Date	Insurance End Date	Disenrollment Date
12/30/1983	31900201054212146	0.00	Approved	02/18/2015	02/17/2016	12/30/2014
07/1980	31900201099233146	118.83	Approved	02/18/2015	02/17/2016	12/30/2014
01/1960	31900201150212142	27.72	Approved	02/23/2015	02/22/2016	01/23/2015
03/1970	31900201033211141	101.26	Approved	02/23/2015	02/22/2016	01/23/2015

The context menu is open over the first row, and the "Copy" option is circled in red.

4. Paste the list as a “Paste Special” as “Values” in cell A1 of the new sheet (pasting only the values removes unnecessary formulas and formatting).



**QUESTION:** “How do I compare my Medical Home Summary report with my Monthly Grant Funding (MGF) Remittance Advice (R.A.)?”

**ANSWER:** Some clinics like to compare their Medical Home Summary report with their MGF. This process requires doing a “Vlookup” in Excel, which would be difficult to explain in a TIPS sheet. The following link provides an easy, detailed explanation for how to use the “Vlookup” function in Excel: <http://howtovlookupinexcel.com/vlookup-between-two-workbooks>.