



TRAINING MANUAL

Eligibility - Batching

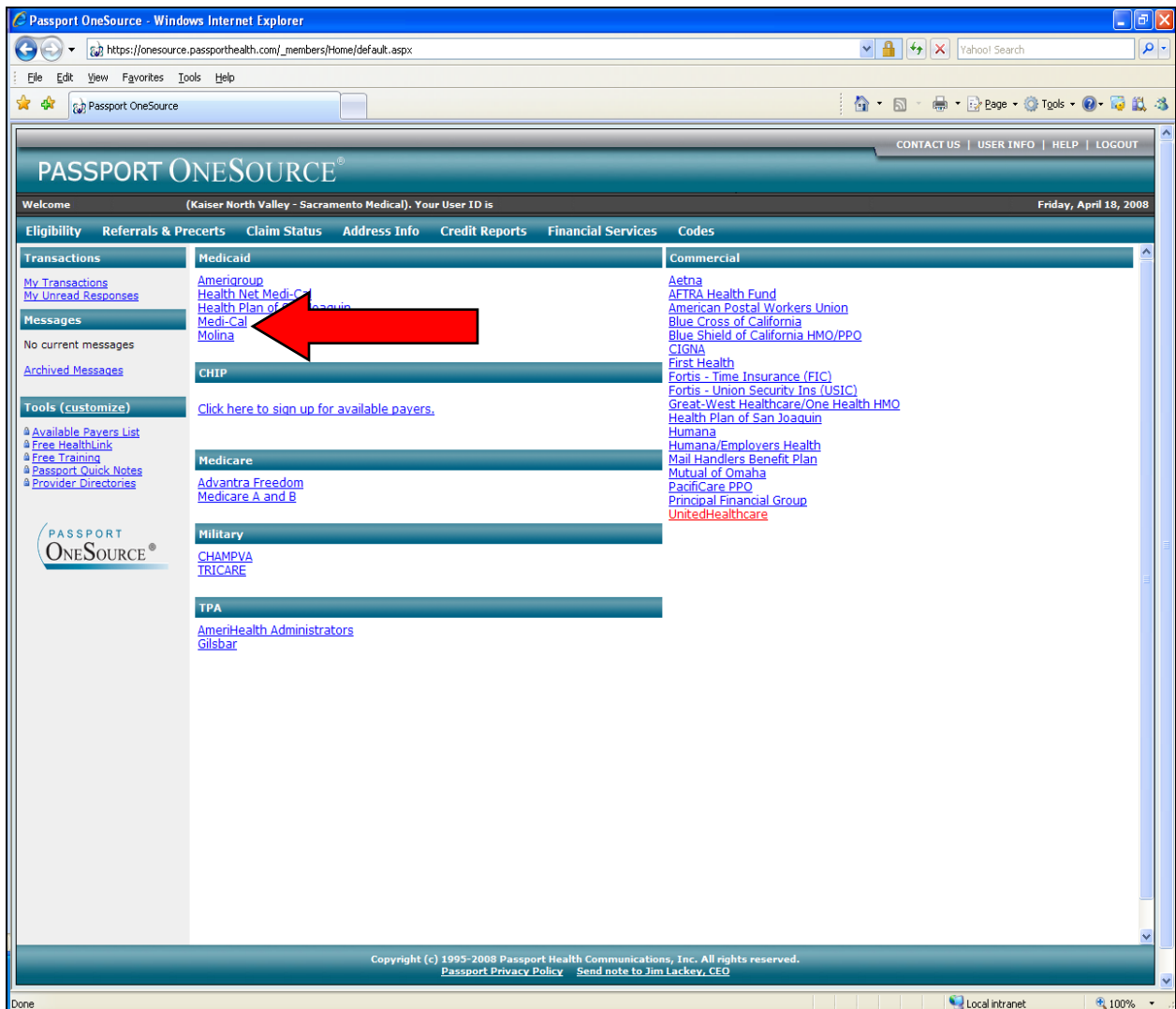
Welcome to Passport OneSource®! This manual is intended to supplement your training with Passport Health Communications. Please remember that Passport offers FREE Online training to your facility at any time.

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Welcome to the Batching section of OneSource! This section will allow you to enter multiple patients at one time to create a “batch.” Over the next few pages we will explain the process for Eligibility batching.

To begin, simply choose the payer you desire as displayed below. For this example we will choose Medi-Cal.



The screenshot shows the Passport OneSource web application interface. The browser title is "Passport OneSource - Windows Internet Explorer" and the address bar shows the URL "https://onesource.passporthealth.com/_members/home/default.aspx". The page header includes "PASSPORT ONE SOURCE" and navigation links for "CONTACT US", "USER INFO", "HELP", and "LOGOUT". Below the header, a welcome message reads "(Kaiser North Valley - Sacramento Medical). Your User ID is" followed by a date "Friday, April 18, 2008".

The main content area is divided into several sections:

- Eligibility**: This section is highlighted in the top navigation bar. It contains three columns of payer options:
 - Medicaid**: Includes links for "Amerigroup", "Health Net Medi-Cal", "Molina", and "Medi-Cal". A red arrow points to the "Medi-Cal" link.
 - CHIP**: Includes a link "Click here to sign up for available payers."
 - Medicare**: Includes links for "Advantra Freedom" and "Medicare A and B".
 - Military**: Includes links for "CHAMPVA" and "TRICARE".
 - TPA**: Includes links for "AmeriHealth Administrators" and "Gilsbar".
- Commercial**: Lists various commercial payers such as "Aetna", "AFTRA Health Fund", "American Postal Workers Union", "Blue Cross of California", "Blue Shield of California HMO/PPO", "CIGNA", "First Health", "Fortis - Time Insurance (FIC)", "Fortis - Union Security Ins (USIC)", "Great-West Healthcare/One Health HMO", "Health Plan of San Joaquin", "Humana", "Humana/Employers Health", "Mail Handlers Benefit Plan", "Mutual of Omaha", "PacifiCare PPO", "Principal Financial Group", and "UnitedHealthcare".

Other sections visible on the page include "Transactions" (My Transactions, My Unread Responses), "Messages" (No current messages, Archived Messages), and "Tools (customize)" (Available Payers List, Free HealthLink, Free Training, Passport Quick Notes, Provider Directories). The footer contains copyright information: "Copyright (c) 1995-2008 Passport Health Communications, Inc. All rights reserved. Passport Privacy Policy Send note to Jim Lackey, CEO".

Once you have chosen your desired payer your entry screen will appear as displayed below.

Immediate response available.

Medi-Cal Eligibility


Provider:

Insured ID:

Patient Date of Birth:

Card Issue Date:

Date of Service:



Items in **BOLD** are required.

To begin your batch, simply click “New Batch.”

Immediate response available.

Medi-Cal Eligibility


Provider:


Insured ID:

Patient Date of Birth:

Card Issue Date:

Date of Service:

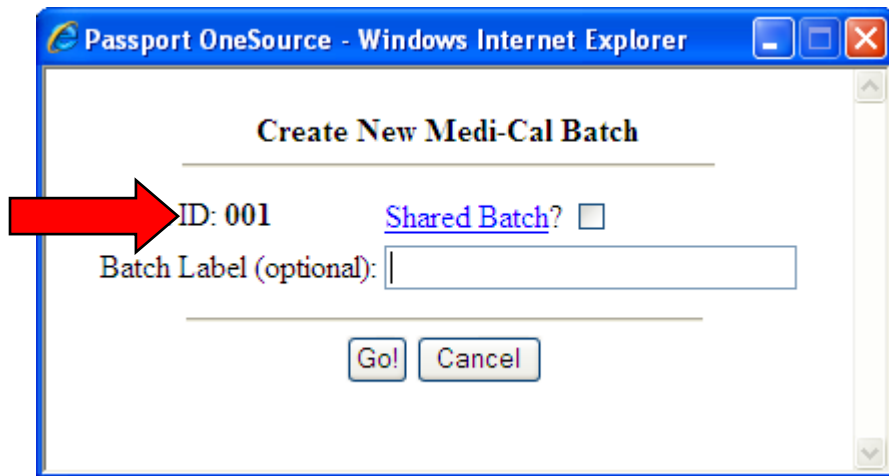




Items in **BOLD** are required.

Once you click “New Batch” a pop-up box will appear.

You will first notice a Batch ID number, in this case 001. This identifies the number of batches you have run for that day.



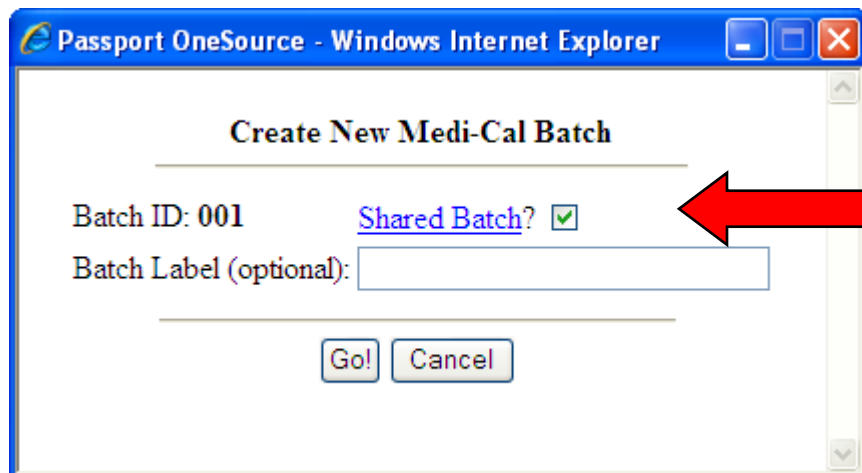
Passport OneSource - Windows Internet Explorer

Create New Medi-Cal Batch

ID: 001 [Shared Batch?](#)

Batch Label (optional):

Next, you have the option to share your batch. By clicking the “Shared Batch” box you will share your responses with everyone at your facility.



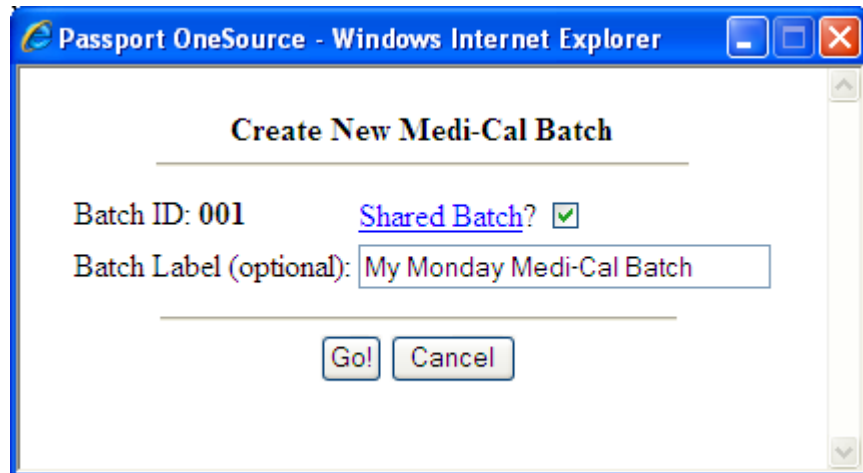
Passport OneSource - Windows Internet Explorer

Create New Medi-Cal Batch

Batch ID: 001 [Shared Batch?](#)

Batch Label (optional):

You will also have the option to label your batch. For this example we labeled the batch “My Monday Medi-Cal Batch.”



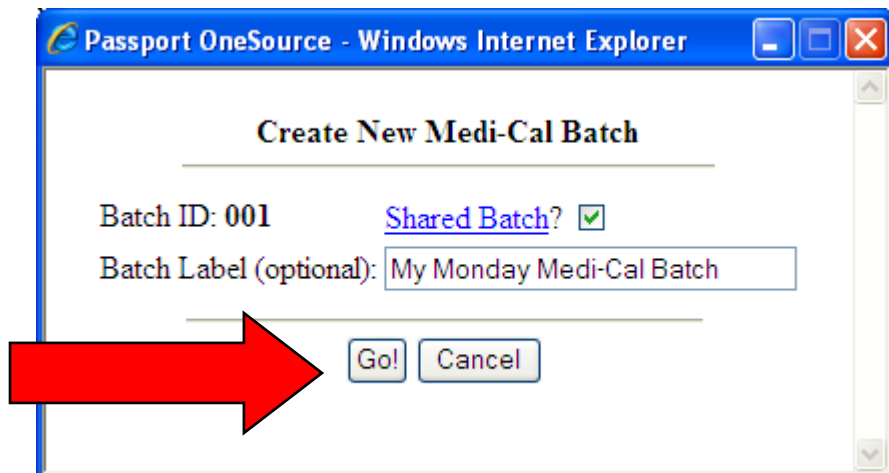
Passport OneSource - Windows Internet Explorer

Create New Medi-Cal Batch

Batch ID: 001 [Shared Batch?](#)

Batch Label (optional):

Once you have completed this you are ready to hit the “Go!” button as displayed below.



Passport OneSource - Windows Internet Explorer

Create New Medi-Cal Batch

Batch ID: 001 [Shared Batch?](#)

Batch Label (optional):

Once you click the “Go” button, your screen will refresh. You are now in “Batch Mode.” The “Batch Box” shown below identifies the batch by the batch number and title (if you chose to title the batch) and the “Last Inquiry” which in this example is “None.”

Immediate response available.

Medi-Cal Eligibility

Batch	001: My Monday Medi-Cal Batch
Last Inquiry	None


Provider: (00c289880)

Insured ID:

Patient Date of Birth:

Card Issue Date:

Date of Service: 04/21/2008



[Exit Batch Mode](#)

Items in **BOLD** are required.



Next, begin by entering your first patient's information and click the "Go" button.

Immediate response available.

Medi-Cal Eligibility

Batch	001: My Monday Medi-Cal Batch
Last Inquiry	None

Provider:	(00c289880)	} Required Search Criteria
Insured ID:	123456789	
Patient Date of Birth:	06/13/1972	
Card Issue Date:		
Date of Service:	04/21/2008	

[Exit Batch Mode](#)

Batch Results	New Batch	My Batches	My Singles
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Items in **BOLD** are required.

Once you have clicked the “Go” button your information will move from the search fields into the “Batch Box” as shown below. Now, instead of displaying “Last Inquiry: None”, you should see “Last Inquiry: #1” and the search criteria that was input.

Immediate response available.

Medi-Cal Eligibility

Batch	001: My Monday Medi-Cal Batch
Last Inquiry	#1: 00c289880 123456789 06/13/1972 04/21/2008


Provider: (00c289880)

Insured ID:

Patient Date of Birth:

Card Issue Date:

Date of Service: 04/21/2008



[Exit Batch Mode](#)

Items in **BOLD** are required.

You are now ready to enter your second patient. Simply enter the patient's information as displayed below.

***NOTE:** For this example we have entered the **SAME** patient twice.



Once you have entered your second patient click "Go."

Immediate response available.

Medi-Cal Eligibility

Batch	001: My Monday Medi-Cal Batch
Last Inquiry	#1: 00c289880 123456789 06/13/1972 04/21/2008

Provider:	<input type="text" value="(00c289880)"/>
Insured ID:	<input type="text" value="123456789"/>
Patient Date of Birth:	<input type="text" value="06/13/1972"/>
Card Issue Date:	<input type="text"/>
Date of Service:	<input type="text" value="04/21/2008"/>



[Exit Batch Mode](#)

Batch Results**New Batch****My Batches****My Singles**

Items in **BOLD** are required.

Once again, when you click the “Go” button your information will move from the search fields into the “Batch Box” as displayed below. You should now have 2 inquiries in the “Last Inquiry” section.

Immediate response available.

Medi-Cal Eligibility

Batch	001: My Monday Medi-Cal Batch
Last Inquiry	#2: 00c289880 123456789 06/13/1972 04/21/2008


Provider: (00c289880)

Insured ID:

Patient Date of Birth:

Card Issue Date:

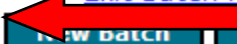
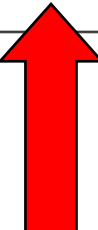
Date of Service: 04/21/2008



[Exit Batch Mode](#)

Batch Results

Items in **BOLD** are required.



Once you have entered all of the patients in your batch, you can retrieve the results by simply clicking “Batch Results.”







Once you have clicked “Batch Results” a new window will open and the following information will be shown. This will be a summary view of the eligibility results for the patients you entered.

CLOSE THIS WINDOW

PASSPORT ONESOURCE®

Unread My Batches My Single Inquiries Shared Batches

BATCH DETAILS FOR: 001-My Monday Medi-Cal Batch

#	DATE/TIME	SEARCH CRITERIA	RESPONSE	STATUS	PAYER/DATA PROVIDER	VIEW
1	04/21/2008 06:14 PM	Provider ID: 00c289880 Insured ID: 123456789 Patient Date of Birth: 06/13/1972 Date of Service: 04/21/2008	Eligible Name: SMITH, PATIENT Insured ID: 546193690 DOB: 6/13/1972 Sex: M	Done	Medi-Cal Eligibility  	Not Viewed 
2	04/21/2008 06:15 PM	Provider ID: 00c289880 Insured ID: 123456789 Patient Date of Birth: 06/13/1972 Date of Service: 04/21/2008	Eligible Name: SMITH, PATIENT Insured ID: 546193690 DOB: 6/13/1972 Sex: M	Done	Medi-Cal Eligibility  	Not Viewed 

 [View/Print All Detailed Responses](#)







To view a particular response, simply click the envelopes under “View” on the right hand side.

CLOSE THIS WINDOW

PASSPORT ONESOURCE[®]

Unread My Batches My Single Inquiries Shared Batches

BATCH DETAILS FOR: 001-My Monday Medi-Cal Batch

#	DATE/TIME	SEARCH CRITERIA	RESPONSE	STATUS	PAYER/DATA PROVIDER	VIEW
1	04/21/2008 06:14 PM	Provider ID: 00c289880 Insured ID: 123456789 Patient Date of Birth: 06/13/1972 Date of Service: 04/21/2008	Eligible Name: SMITH, PATIENT Insured ID: 546193690 DOB: 6/13/1972 Sex: M	Done	Medi-Cal Eligibility  	Not Viewed 
2	04/21/2008 06:15 PM	Provider ID: 00c289880 Insured ID: 123456789 Patient Date of Birth: 06/13/1972 Date of Service: 04/21/2008	Eligible Name: SMITH, PATIENT Insured ID: 546193690 DOB: 6/13/1972 Sex: M	Done	Medi-Cal Eligibility  	Not Viewed 

 [View/Print All Detailed Responses](#)







To view all of the responses at one time, simply click “View/Print All Detailed Responses” at the bottom of the screen.

CLOSE THIS WINDOW

PASSPORT ONESOURCE[®]

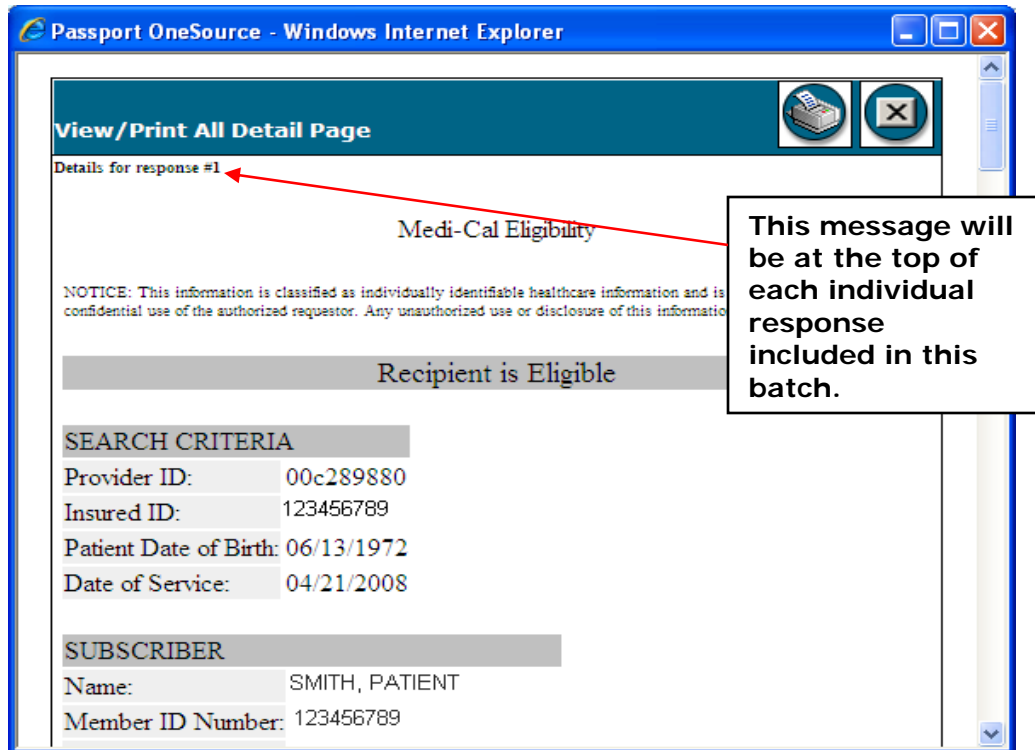
Unread My Batches My Single Inquiries Shared Batches

BATCH DETAILS FOR: 001-My Monday Medi-Cal Batch

#	DATE/TIME	SEARCH CRITERIA	RESPONSE	STATUS	PAYER/DATA PROVIDER	VIEW
1	04/21/2008 06:14 PM	Provider ID: 00c289880 Insured ID: 123456789 Patient Date of Birth: 06/13/1972 Date of Service: 04/21/2008	Eligible Name: SMITH, PATIENT Insured ID: 546193690 DOB: 6/13/1972 Sex: M	Done	Medi-Cal Eligibility  	Not Viewed 
2	04/21/2008 06:15 PM	Provider ID: 00c289880 Insured ID: 123456789 Patient Date of Birth: 06/13/1972 Date of Service: 04/21/2008	Eligible Name: SMITH, PATIENT Insured ID: 546193690 DOB: 6/13/1972 Sex: M	Done	Medi-Cal Eligibility  	Not Viewed 

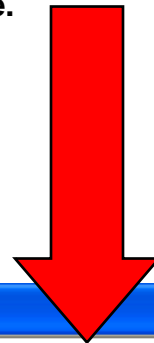

[View/Print All Detailed Responses](#)

When you click “View/Print All Detailed Responses,” it will display a new window containing each response you ran in that particular batch. They will be identified by the response number at the top.



By clicking the printer icon you have the ability to print out every single response in that batch with a single button.

*NOTE: There will be a page break in between each response.



Passport OneSource - Windows Internet Explorer

View/Print All Detail Page

Details for response #1

Medi-Cal Eligibility

NOTICE: This information is classified as individually identifiable healthcare information and is intended strictly for the confidential use of the authorized requestor. Any unauthorized use or disclosure of this information is prohibited.

Recipient is Eligible

SEARCH CRITERIA

Provider ID:	00c289880
Insured ID:	123456789
Patient Date of Birth:	06/13/1972
Date of Service:	04/21/2008

SUBSCRIBER

Name:	SMITH, PATIENT
Member ID Number:	123456789

Viewing My Batches and Shared Batches

As you learned before, you can view the transactions that you've ran for the past 7 days. This is true for both your Batches and Shared Batches. To access either your Batches or Shared Batches, simply click "My Transactions" from the left side of your home screen.

The screenshot shows the Passport OneSource web application. The browser title is "Passport OneSource - Windows Internet Explorer" and the address bar shows "https://onesource.passporthealth.com/_members/Home/default.aspx". The page header includes "PASSPORT ONESOURCE" and navigation links for "CONTACT US", "USER INFO", "HELP", and "LOGOUT". The date "Tuesday, April 22, 2008" is displayed in the top right. The main navigation menu includes "Eligibility", "Referrals & Precerts", "Claim Status", "Address Info", "Credit Reports", "Financial Services", and "Codes". The "Transactions" section is active, showing a list of insurance providers. A red arrow points to the "My Transactions" link in the left sidebar. The main content area displays a list of insurance providers under various categories: Medicaid, Commercial, CHIP, Medicare, Military, and TPA. The footer contains copyright information: "Copyright (c) 1995-2008 Passport Health Communications, Inc. All rights reserved. Passport Privacy Policy Send note to Jim Lackey, CEO".

Medicaid	Commercial
Health Plan of San Joaquin	Aetna
Medi-Cal	AFTRA Health Fund
Molina	American Postal Workers Union
	Blue Cross of California
	Blue Shield of California HMO/PPO
	CIGNA
	First Health
	Fortis - Time Insurance (FIC)
	Fortis - Union Security Ins (USIC)
	Great-West Healthcare/One Health HMO
	Health Plan of San Joaquin
	Humana
	Humana/Employers Health
	Mail Handlers Benefit Plan
	Mutual of Omaha
	PacifiCare PPO
	Principal Financial Group
	UnitedHealthcare

A new window will open, and the view will be of your "Single Transactions".
Simply click "My Batches" to access your current batches.

CLOSE THIS WINDOW

PASSPORT ONESOURCE®

Unread **My Batches** My Single Inquiries Shared Batches

MY SINGLE INQUIRIES FOR 04/18/2008

#	DATE/TIME	SEARCH CRITERIA	RESPONSE	STATUS	PAYER/DATA PROVIDER	VIEW
1	04/18/2008 10:37 AM	NPI: 1457392904 Subscriber ID: U1111111111 Date of Birth: 09/10/1944 Service Type Code: 30 Date of Service: 04/17/2008	Eligible Name: SMITH, PATIENT Member ID: U1111111111 DOB: 9/10/1944 Sex: M	Done	CIGNA Eligibility 	Viewed

[View/Print All Detailed Responses](#)

Your screen will refresh and a summary of your current batches will be displayed.

CLOSE THIS WINDOW

PASSPORT ONESOURCE®

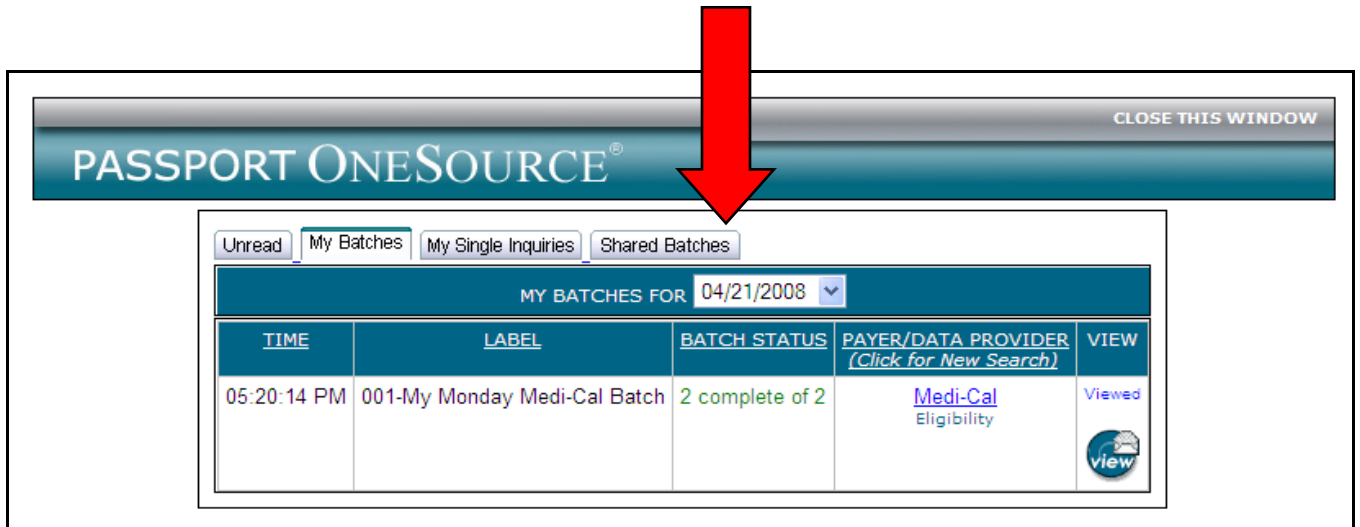
Unread **My Batches** My Single Inquiries Shared Batches

MY BATCHES FOR 04/21/2008


TIME	LABEL	BATCH STATUS	PAYER/DATA PROVIDER <i>(Click for New Search)</i>	VIEW
05:20:14 PM	001-My Monday Medi-Cal Batch	2 complete of 2	Medi-Cal Eligibility	Viewed

To view the details of a particular batch, simply click the “View” button. Remember that you can switch the view to a different day by using the drop down menu in the date field.

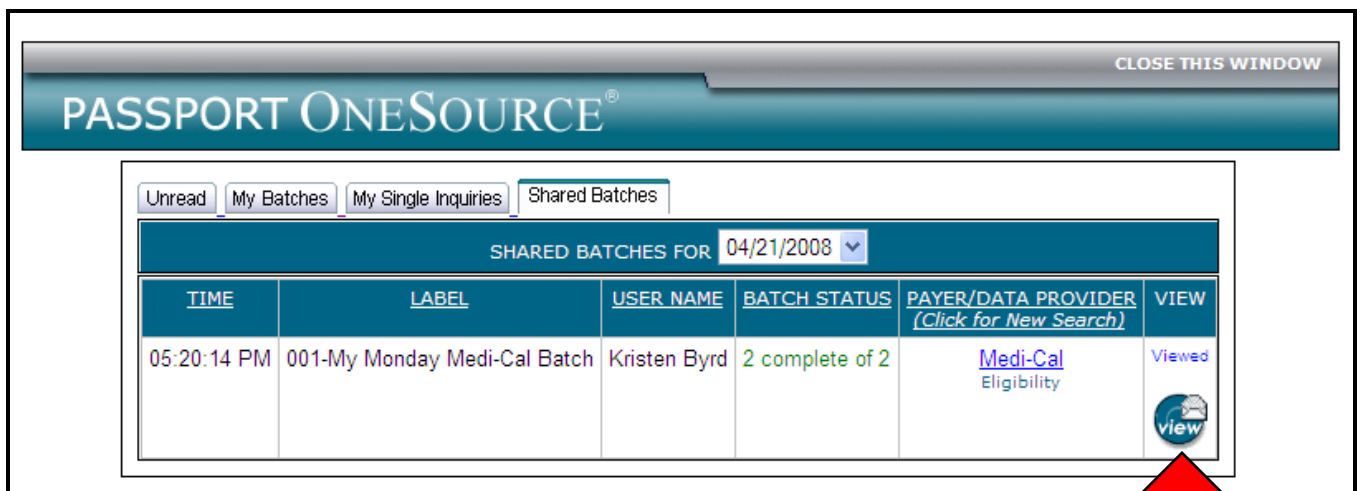
If you would like to view a listing of all “Shared Batches” for the facility, simply click the tab labeled “Shared Batches.”




The screenshot shows the PASSPORT ONESOURCE interface. At the top, there is a header bar with the logo and a "CLOSE THIS WINDOW" button. Below the header, there are four tabs: "Unread", "My Batches", "My Single Inquiries", and "Shared Batches". A red arrow points to the "Shared Batches" tab. Below the tabs, there is a section titled "MY BATCHES FOR" with a date dropdown menu set to "04/21/2008". Below this is a table with the following data:

TIME	LABEL	BATCH STATUS	PAYER/DATA PROVIDER <i>(Click for New Search)</i>	VIEW
05:20:14 PM	001-My Monday Medi-Cal Batch	2 complete of 2	Medi-Cal Eligibility	Viewed 

The “Shared Batches” tab will display every batch that has been shared by anyone at your facility on that particular date. You will notice the name of the user who has shared the batch along with any label or batch description they entered.



The screenshot shows the PASSPORT ONESOURCE interface. At the top right, there is a "CLOSE THIS WINDOW" button. Below the header, there are navigation tabs: "Unread", "My Batches", "My Single Inquiries", and "Shared Batches". The "Shared Batches" tab is active, and it shows "SHARED BATCHES FOR 04/21/2008". Below this, there is a table with the following columns: TIME, LABEL, USER NAME, BATCH STATUS, PAYER/DATA PROVIDER (with a sub-link "(Click for New Search)"), and VIEW. The table contains one row of data: 05:20:14 PM, 001-My Monday Medi-Cal Batch, Kristen Byrd, 2 complete of 2, Medi-Cal Eligibility, and Viewed. A red arrow points to the "View" button in the "VIEW" column of the table.

TIME	LABEL	USER NAME	BATCH STATUS	PAYER/DATA PROVIDER <i>(Click for New Search)</i>	VIEW
05:20:14 PM	001-My Monday Medi-Cal Batch	Kristen Byrd	2 complete of 2	Medi-Cal Eligibility	Viewed 

To view the results of a shared batch, simply click the envelope button under “View.” The results will display exactly the same as they did before in “My Batches.”