Harvard Pilgrim Health Care

HPHConnect for Providers

Member Roster User Guide

March 2015

HPHConnect Member Roster
Table of Contents

Overview

Introduction

The Member Roster Report, which provides a listing of member's assigned to a primary care provider, has been enhanced. Now, you can run the report for any of the following:

- PCP
- Provider Practice
- Access List

To access the Member Roster Report Request Form, click on "Office Management" on the top navigation bar then click on "Reports." When the list of available reports displays, select "Member Roster."

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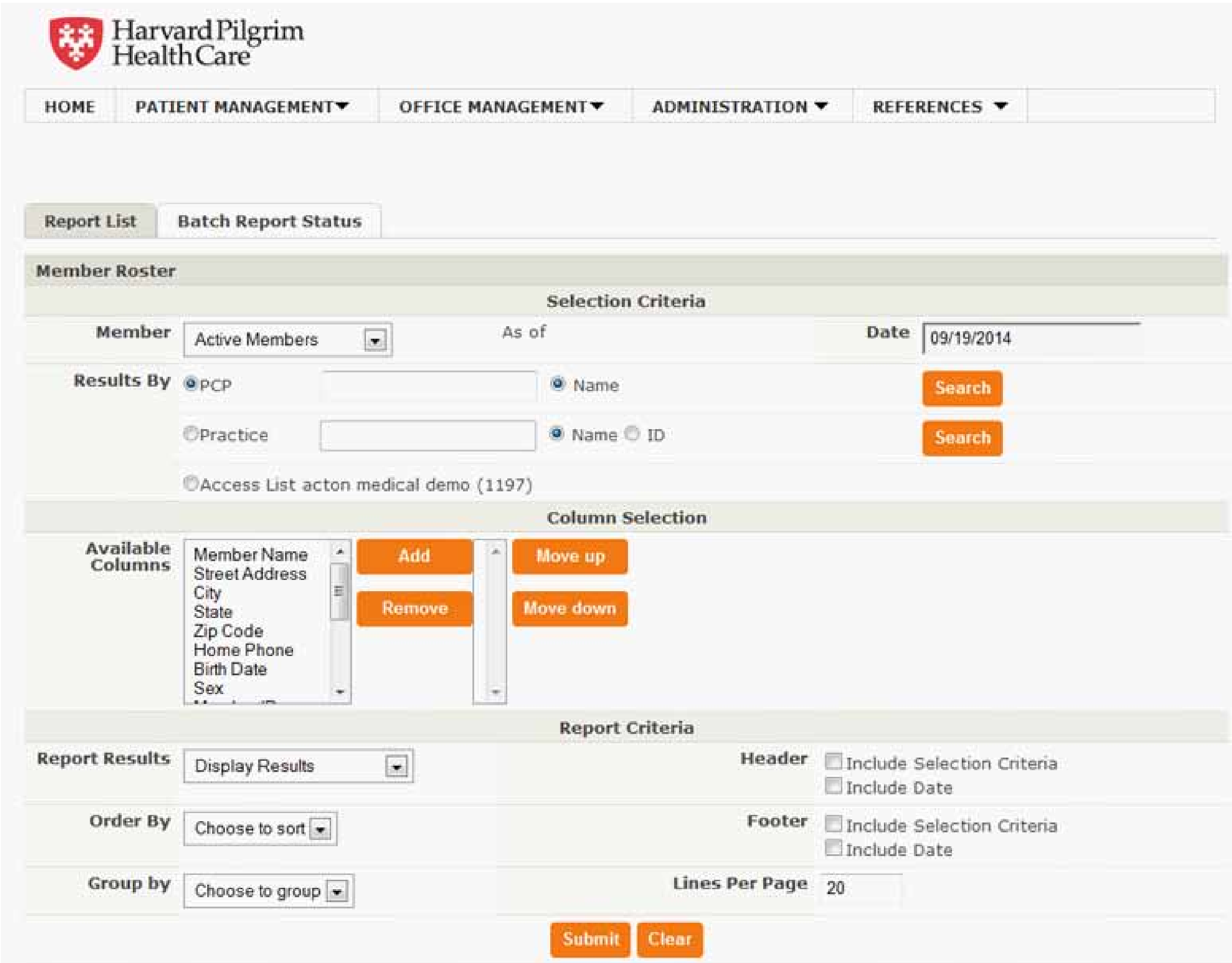
Member Roster Report Request Form

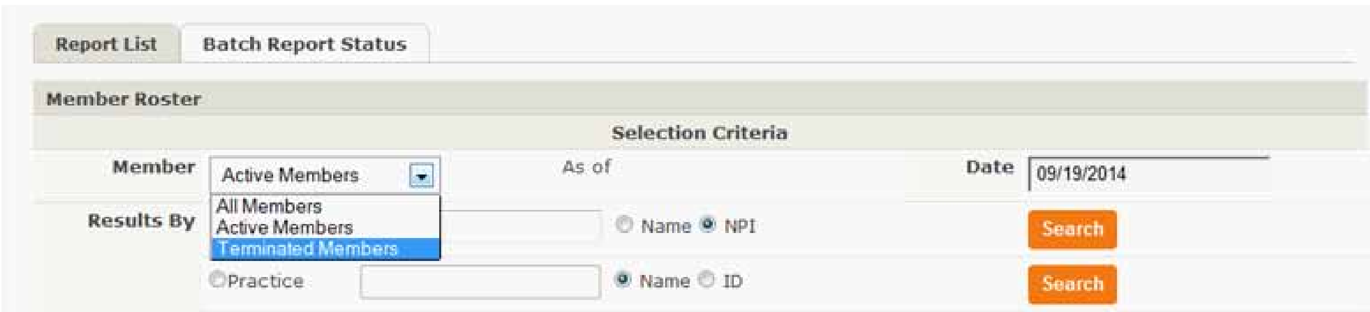
The Member Roster Report Request Form provides variable report criteria options making it easy to customize your report to meet your administrative needs.



Selection Criteria

Member

You can specify which members to include in the report by selecting the values from the drop-down lists and adjusting the date prior to today's date (the default), if desired.



To view a report of	Select
All your members — active and terminated	All Members As of today's date (the default)
Only your current active members	Active Members As of today's date (the default)
New members added to your panel as of a specific date	Active Members Added Effective Specify the date
Members who were terminated as of a specific date	Terminated Members As of, or Terminated Effective and specify the date

Results By

The search criteria have been expanded. You can now search by:

- PCP — To view the member roster of an individual PCP
- Practice — To view the member rosters of all PCPs at a group practice
- Access List — To view the member rosters of all PCPs on your access list

You can only select one of the search options listed above. When you select an option, the drop-down for the additional two search options will be grayed out, indicating that only one option is available for selection.

Results by Practice

The practice drop-down will be limited to the practices represented on the user's Access List.

Results by Access List

The Access List option displays the currently selected user role's access list name.

Results By — Access List with Fewer Than 20 Providers

When there are fewer than 20 providers on your *HPHConnect* for Providers access list, the names of the providers display on the PCP drop-down list. To request the Member Roster Report for one of your PCPs, select the provider from the list.

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Results By – Access List with More Than 20 Providers

When there are more than 20 providers on your *HPHConnect* for Providers Access List, there is no PCP drop-down list. To request the Member Roster Report for one of your PCPs, select your search mode, name or NPI, and enter the appropriate information in the space provided. Click on "Search."

Reminder: When searching by name, enter last name first, followed by a comma, and first name or initial with no spaces.

When the Provider Directory displays, select the provider.

You will be returned to the Member Roster Report Request Form to complete your selections and submit your request.

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Column Selection

Available Columns

You can customize the information in your report by selecting the column headings from the Available Columns list and clicking on "Add." The column heading names will display in the box to the right.

To select multiple columns at once, hold down the **CTRL** key as you select the desired columns. When you have finished selecting, click on "Add" to copy the highlighted fields to the box on to the right.

To arrange the columns in the order that you would like them to appear on your report, select the column title in the box to the right and use the "Move up" and "Move down" buttons.

Report Criteria

Overview

The settings that you select in the Report Criteria section will determine the format of the report and the order in which the information is displayed.

Report Results

The report can be viewed online or formatted for downloading as a PDF, an Excel spreadsheet, or a comma delimited file that can be uploaded to a spreadsheet or database application.

If you select	And the requested report has	Then
Display Results	Fewer than 2,000 records	The report will display directly online.
Display Results	More than 2,000 records	You will be prompted to select a downloadable format. The report will be run overnight as an Extended Length report and will be available the next day in your File Transfer Agent Inbox for downloading.
Download any format	Fewer than 2,000 records	The report will be immediately available in your File Transfer Agent Inbox for downloading.
Download any format	More than 2,000 records	The report will be run overnight as an Extended Length report and will be available the next day in your File Transfer Agent Inbox for downloading.

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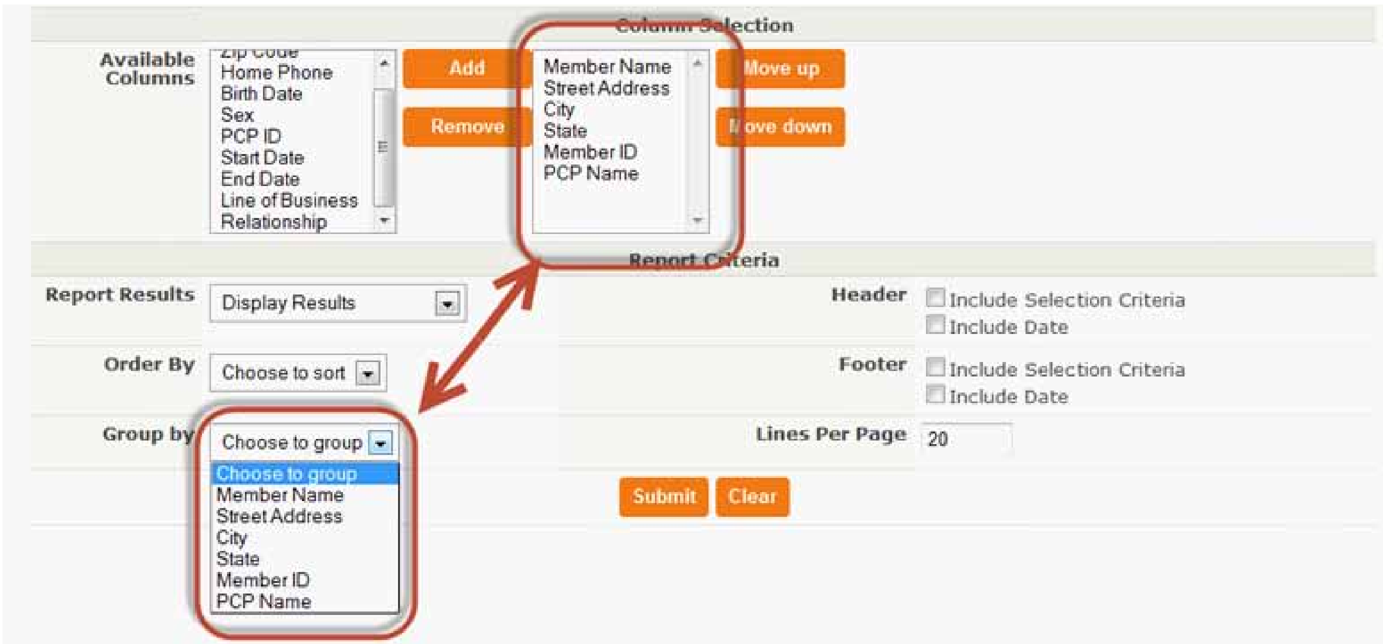
Order By/ Group By

You can sort and/or group the data in your report by selecting from the options available in the "Order By" and "Group By" drop-down lists. The options listed correspond to the columns you selected in the Available Columns section.



Header/Footer/ Lines Per Page

To include the selection criteria and the date of your report as a header or footer, click on the appropriate check box.

The default number of lines per page is 20. If you want to have fewer or more, enter the number of lines you would like per page.

Report Results

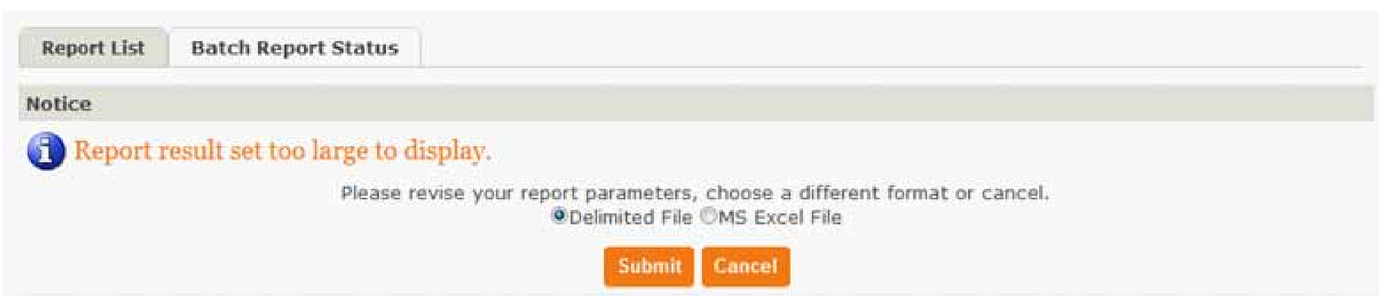
Display Results– Fewer Than 2,000 Records

The report displays online as requested with the selected columns and the “Header” or “Footer,” if indicated on the request form.

Member Directory				
Last Name	First Name	Birth Date	Member ID	PCP Name
PATIENT	STEVEN	13 Apr 1949	HP123456700	DOCTOR,DON
PATIENT	CHANDAN	2 Jan 1964	HP 987654301	DOCTOR,DON
PATIENT	RONALD	20 Oct 1971	HP 888888800	DOCTOR,DON
PATIENT	DONNA	16 May 1954	HP 555555501	DOCTOR,DON

Display Results– More Than 2,000 Records

Reports containing more than 2000 records cannot be displayed directly online and are processed as an Extended Length Report, which will be run overnight and will be available the next day in your File Transfer Agent Inbox for downloading. If you request to “Display Results” for a report with more than 2,000 records, you will be presented with the notice below.



You can either:

• Cancel the request and return to the Member Roster request screen to resubmit the request with redefined criteria, or

• Select the format to be processed and click on “Submit”

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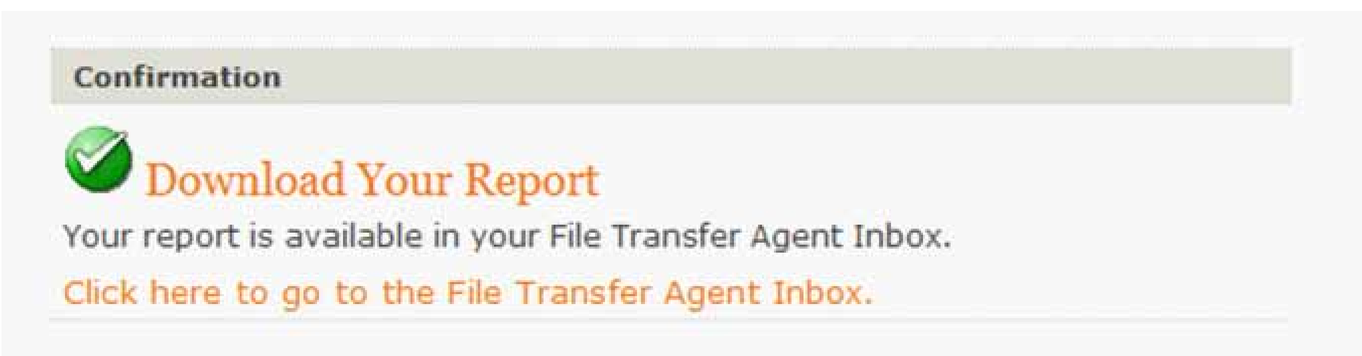
When you click on "Submit," the informational Extended Length Report message displays:

You can monitor the status of your request by clicking on the "Batch Report Status" tab.

Download Any Format – Less Than 2,000 Records

Reports containing less than 2000 records will be available immediately in your File Transfer Agent Inbox for downloading. You will receive the following confirmation message.



When you click on the link to the Office Management, select "File Transfer Agent", your report appears in the list of files ready to be downloaded.

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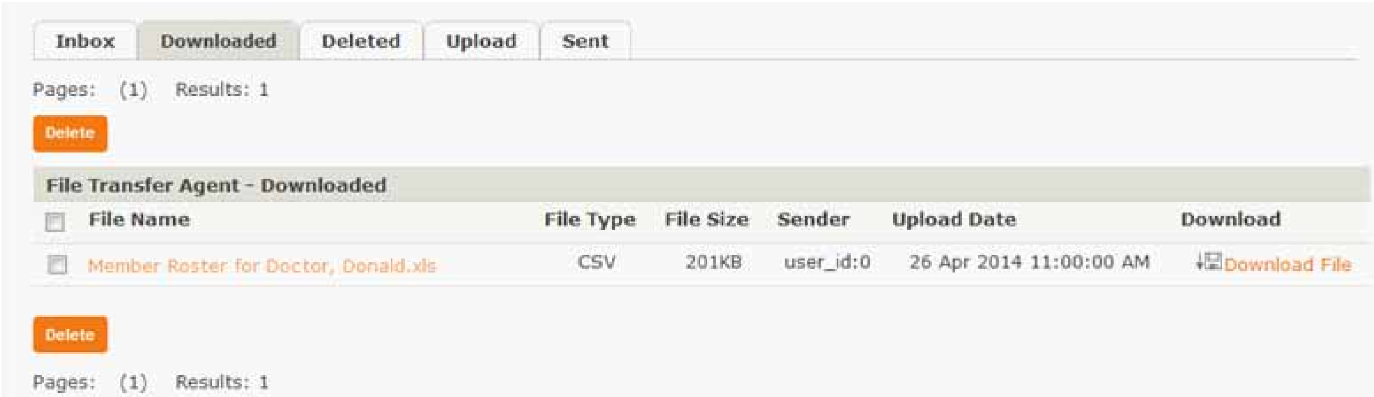

Download Any Format – More Than 2,000 Records

Reports containing more than 2,000 records are processed as an Extended Length Report, which will be run overnight and be available the next day in your File Transfer Agent Inbox for downloading. When you request to download a report that contains more than 2,000 records, you will be presented with the informational Extended Length Report message.

You can monitor the status or your request by clicking on the "Batch Report Status" tab.

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The next day, click on the link to Office Management, select “File Transfer Agent”, and your Member Roster Report will appear in the list of files ready to be downloaded.