MMTP TRAINING
<table>
<thead>
<tr>
<th>Function</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log Into PTAR</td>
<td>3</td>
</tr>
<tr>
<td>My Dashboard</td>
<td>7</td>
</tr>
<tr>
<td>MMTP Batch Entry</td>
<td>14</td>
</tr>
<tr>
<td>MMTP Spreadsheet Upload</td>
<td>32</td>
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<tr>
<td>Manage Provider Information</td>
<td>47</td>
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<tr>
<td>Transaction History</td>
<td>88</td>
</tr>
<tr>
<td>User Management</td>
<td>117</td>
</tr>
</tbody>
</table>
Log Into PTAR
Enter Username
Enter Password

New York State Department of Health Public Transportation Automated Reimbursement System

Username: username

Password:

Login

I have read and agree to the conditions below

Please Note: (i) Users are accessing a New York State government information system; (ii) System usage may be monitored, recorded, and subject to audit; (iii) Unauthorized use of the system is prohibited and subject to criminal and civil penalties; and (iv) Use of the system indicates consent to monitoring and recording.

(v) Prevent unauthorized access and safeguard the confidentiality of person/consumer data in compliance with State and Federal law, including the Health Insurance Portability and Accountability Act (HIPAA), the New York State Personal Privacy Protection Law, and the data breach provisions of the New York State Technology Law.


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For PTAR Help desk support please call 1-800-343-9000.
Agree To Usage Conditions
MY DASHBOARD
Dashboard
Enter Client Name
First Character

Welcome to the New York State Department of Health - Public Transportation Automated Reimbursement System

Provider: DUE SOUTH MEDICAL  Location: DUE SOUTH MEDICAL 1

Enter a Client ID or Client Name in the field to the left. For name entries only, the system will begin suggesting matching clients after the third character.

Submitted Spreadsheet Files with Outstanding Errors
No records found.

Draft Transactions
No records found.
Enter Client Name
Second Character
Enter Client Name
Third Displays Matches
Select Client

Welcome to the New York State Department of Health - Public Transportation Automated Reimbursement System

My Dashboard

Provider: DUE SOUTH MEDICAL
Location: DUE SOUTH MEDICAL 1

Enter a Client ID or Client Name in the field to the left. For name entries only, the system will begin suggesting matching clients after the third character.

Submitted

- NOE
- NOEN PATIENS - [AA12345Z]
- NOEL PATIENS - [AA12346Z]

Draft Transactions

No records found.
Client Details

Client: NOEL PATIENS (ZZ12366A)
Address: 2112 MMTP WAY
        YAWTOWN, NY 12345
Gender: Male
Date of Birth: 05/17/1970
Suspend Payment: NO

Pending / Held Transactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Status</th>
<th>FCN</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/12/2015</td>
<td>$ 5.50</td>
<td>Held</td>
<td>201411042010001</td>
</tr>
<tr>
<td>02/02/2015</td>
<td>$ 5.50</td>
<td>Pending</td>
<td>201411042010002</td>
</tr>
</tbody>
</table>

Payment History

No records found.
MMTP BATCH ENTRY
Submit MMTP Transactions For Offline Processing
Enter Client ID

MMTP Batch Entry
Enter MMTP transactions for offline processing

Client ID: ZZ12345A
Location: DUE SOUTH MEDICAL 1

December 2014

January 2015

February 2015

March 2015

Save  Cancel
Select Location

MMTP Batch Entry
Enter MMTP transactions for offline processing

Client ID: ZZ12345A
Location: DUE SOUTH MEDICAL 1

Dates for December 2014, January 2015, February 2015, and March 2015 are displayed.

Save  Cancel
Display List

MMTP Batch Entry
Enter MMTP transactions for offline processing

Client ID: ZZ12345A
Location: DUE SOUTH MEDICAL 1

Due South Medical 1
Due South Medical 2
Due South Medical 3
Due South Medical Metro
Due South Medical Urgent

Save  Cancel
Select Due South Medical Metro

MMTP Batch Entry
Enter MMTP transactions for offline processing

Client ID: ZZ12345A
Location:

December 2014

January 2015

February 2015

DUE SOUTH MEDICAL 1
DUE SOUTH MEDICAL 2
DUE SOUTH MEDICAL 3
DUE SOUTH MEDICAL METRO
DUE SOUTH MEDICAL URGENT

Save  Cancel
Select Date or Dates
Default is Current Date
Add Another Date
Move to January 14, 2015
Click on Day
January 14, 2015 Added
Add Another Date

MMTP Batch Entry
Enter MMTP transactions for offline processing

Client ID: ZZ12345A
Location: DUE SOUTH MEDICAL METRO

Calendar for January 2015:
- Date 14 is highlighted.

Save  Cancel
Move to January 9, 2015
Click on Day
January 9, 2015 Added
Clear Current Date
By Returning to It
Current Date Cleared

MMTP Batch Entry
Enter MMTP transactions for offline processing

Client ID: ZZ12345A
Location: DUE SOUTH MEDICAL METRO

Calendars for December 2014, January 2015, February 2015, and March 2015

Save  Cancel
Click Save To Submit Transactions
MMTP SPREADSHEET UPLOAD
Upload Transactions In A Spreadsheet

**MMTP Spreadsheet Upload**

Upload MMTP transactions for offline processing

- **Location:** DUE SOUTH 3
- **File:** Browse to select a file
- **Templates:** MMTP_Batch_Template.xls

**Submission History**

1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM
2. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM
3. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM
4. 5 of 6 transactions failed initial validations. Submitted by TESTID1 on 03/12/2015 at 1:35PM
Use The Supplied Template

MMTP Spreadsheet Upload

- Location: DUE SOUTH 3
- File: Browse...
- Templates: MMTP_Batch_Template.xls

Submission History:
1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM
2. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM
3. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM
4. 5 of 6 transactions failed initial validations. Submitted by TESTID1 on 03/12/2015 at 1:35PM
Template Downloaded

- **Location:** DUE SOUTH 3
- **File:** [Browse...](#) Browse to select a file
- **Templates:** [MMTP_Batch_Template.xls](#)

**Submission History**

1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM
2. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM
3. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM
Open Template in Excel

MMTP Spreadsheet Upload

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: MMTP_Batch_Template.xls

Submission History

1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM

2. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM

3. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM
# Edit Template

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client ID (Medicaid CIN)</td>
<td>Date of Service (MM/DD/YYYY)</td>
</tr>
</tbody>
</table>

[Excel file preview]
Add Entries to Template
Save After Adding

| A | B              | C | D | E | F | G | H | I | J | K | L |
|---|----------------|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Client ID (Medicaid CIN) | Date of Service (MM/DD/YYYY) |   |   |   |   |   |   |   |   |   |   |
| 2 | AA12346Z       | 11/14/2014                  |   |   |   |   |   |   |   |   |   |   |
| 3 | AA12345Z       | 11/19/2014                  |   |   |   |   |   |   |   |   |   |   |
| 4 | AA12346Z       | 12/03/2014                  |   |   |   |   |   |   |   |   |   |   |
| 5 | AA12345Z       | 01/08/2015                  |   |   |   |   |   |   |   |   |   |   |
| 6 | AA654327       | 02/24/2015                  |   |   |   |   |   |   |   |   |   |   |
Browse to Saved Template

**MMTP Spreadsheet Upload**

Upload MMTP transactions for offline processing

- **Location:** DUE SOUTH 3
- **File:** Browse to select a file

**Templates:**
- MMTP_Batch_Template.xls

**Submission History**

1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM

2. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM

3. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM

4. 5 of 6 transactions failed initial validations. Submitted by TESTID1 on 03/12/2015 at 1:35PM
Select Template to Upload
Click Open to Complete
Uploaded Template Added

MMTP Spreadsheet Upload

- Location: DUE SOUTH 3
- File: Browse...
- Templates: MMTP_Batch_Template.xls

Submission History

1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/18/2015 at 7:50AM
2. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM
3. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM
4. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM

4/10/2015 MMTP Training
Examine Errors In An Uploaded Spreadsheet

- Location: DUE SOUTH 3
- File: Browse
- Templates: MMTP_Batch_Template.xls

Submission History:
1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/18/2015 at 7:50AM
2. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM
3. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM
4. 5 of 6 transactions failed initial validations. Submitted by RVECCHIO on 03/13/2015 at 2:35PM
Error File Downloaded
Open Error File in Excel

**MMTP Spreadsheet Upload**

Upload MMTP transactions for offline processing

- **Location:** DUE SOUTH 3
- **File:**
  - Browse: Browse to select a file
  - Upload
- **Templates:**
  - MMTP_Batch_Template.xls

**Submission History**

1. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/18/2015 at 7:50AM
2. All 1 transactions were accepted with no errors found. Submitted by LWELCH on 03/16/2015 at 7:00PM
3. All 2 transactions were accepted with no errors found. Submitted by MTHATCHER on 03/16/2015 at 11:29AM
Error File Contains Only Transactions with Errors

<table>
<thead>
<tr>
<th>Client ID</th>
<th>Date of Service (MM/DD/YYYY)</th>
<th>Error Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>999999999</td>
<td>02/01/2015</td>
<td>Client Not Found.</td>
</tr>
<tr>
<td>ZZ12345A</td>
<td>25/01/2014</td>
<td>The date of service is invalid.</td>
</tr>
<tr>
<td>ZZ12346A</td>
<td>25/01/2014</td>
<td>The date of service is invalid.</td>
</tr>
<tr>
<td>ZZ12355A</td>
<td>06/11/2014</td>
<td>The selected date of service is too old. Please select a recent date of service.</td>
</tr>
<tr>
<td>999999999</td>
<td>25/01/2014</td>
<td>Client Not Found., The date of service is invalid.</td>
</tr>
</tbody>
</table>
Fix Indicated Errors and Upload Only Corrected File

<table>
<thead>
<tr>
<th>Client ID</th>
<th>Date of Service (MM/DD/YYYY)</th>
<th>Error Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>999999999</td>
<td>02/01/2015</td>
<td>Client Not Found.</td>
</tr>
<tr>
<td>ZZ12345A</td>
<td>25/01/2014</td>
<td>The date of service is invalid.</td>
</tr>
<tr>
<td>ZZ12346A</td>
<td>25/01/2014</td>
<td>The date of service is invalid.</td>
</tr>
<tr>
<td>ZZ12355A</td>
<td>06/11/2014</td>
<td>The selected date of service is too old. Please select a recent date of service.</td>
</tr>
<tr>
<td>999999999</td>
<td>25/01/2014</td>
<td>Client Not Found., The date of service is invalid.</td>
</tr>
</tbody>
</table>
MANAGE PROVIDER INFORMATION
Manage Providers
Details and Locations

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: All Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

- Add New Location
- Display Active Locations
- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

Save Provider  Back to Dashboard
Name Can Be Changed

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: All Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

+ Add New Location

- Display Active Locations

Due South Medical 1
Due South Medical 3
Due South Medical Metro

Save Provider  Back to Dashboard
## Select Provider Expense

### Provider Details
Below you will find the details for the current provider.

<table>
<thead>
<tr>
<th>Provider ID:</th>
<th>01234567</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Name:</td>
<td>DUE SOUTH MEDICAL</td>
</tr>
<tr>
<td>Provider Expense:</td>
<td>Yes</td>
</tr>
<tr>
<td>Transactions Accepted:</td>
<td>All Managed Care Plans</td>
</tr>
</tbody>
</table>

### Provider Locations
Add a new location or click current locations to edit.

- [Due South Medical 1](#)
- [Due South Medical 3](#)
- [Due South Medical Metro](#)

[Add New Location]
[Display Active Locations]

[Save Provider]  [Back to Dashboard]
Default is Yes

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: No

Provider Locations
Add a new location or click current locations to edit.

- Add New Location
- Display Active Locations

Due South Medical 1
Due South Medical 3
Due South Medical Metro

Save Provider  Back to Dashboard
Keep Default

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: All Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

- Add New Location
- Display Active Locations

- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

Save Provider  Back to Dashboard
Select Transactions Accepted to Set Managed Care Plans

Provider Details

- Provider ID: 01234567
- Provider Name: DUE SOUTH MEDICAL
- Provider Expense: Yes
- Transactions Accepted: All Managed Care Plans

Provider Locations

- Add New Location
- Display Active Locations
- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

Save Provider  Back to Dashboard
All Managed Care Plans Is Default

**Provider Details**
Below you will find the details for the current provider.

- **Provider ID:** 01234567
- **Provider Name:** DUE SOUTH MEDICAL
- **Provider Expense:** Yes
- **Transactions Accepted:**
  - All Managed Care Plans
  - All Managed Care Plans
  - No Managed Care Plans
  - Some Managed Care Plans

**Provider Locations**
Add a new location or click current locations to edit.

- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

**Buttons:**
- Save Provider
- Back to Dashboard

4/10/2015 MMTP Training
No Managed Care Plans Is Opposite

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted:
- All Managed Care Plans
- No Managed Care Plans
- Some Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

Buttons:
- Save Provider
- Back to Dashboard
Select Some Managed Care Plans

**Provider Details**

- Provider ID: 01234567
- Provider Name: DUE SOUTH MEDICAL
- Provider Expense: Yes
- Transactions Accepted: All Managed Care Plans, Some Managed Care Plans

**Provider Locations**

- Add New Location
  - Display Active Locations
- Locations:
  - Due South Medical 1
  - Due South Medical 3
  - Due South Medical Metro

**Buttons**

- Save Provider
- Back to Dashboard
Must Select Plans
Not Accepted

Provider Details
- Provider ID: 01234567
- Provider Name: DUE SOUTH MEDICAL
- Provider Expense: Yes
- Transactions Accepted: Some Managed Care Plans

Provider Locations
- Add New Location
- Display Active Locations
- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

Edit Managed Care Plan List

Save Provider
Back to Dashboard
Click Edit Managed Care Plan List to Edit

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: Some Managed Care Plans

Edit Managed Care Plan List

Provider Locations
Add a new location or click current locations to edit.

Add New Location
Display Active Locations

Due South Medical 1
Due South Medical 3
Due South Medical Metro

Save Provider  Back to Dashboard
Left Side are Accepted Plans  
Right Side are not Accepted

### Exclusion List

<table>
<thead>
<tr>
<th>Managed Care Plans</th>
<th>Exclusion(s): 0 out of 81</th>
</tr>
</thead>
<tbody>
<tr>
<td>AETNA BETTER HEALTH</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AFFINITY HEALTH PLAN INC</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AGEWELL LTC</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>ALPHACARE OF NEW YORK INC</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AMERICHOOSE BY UNITED</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AMERIGROUP COMMUNITY CONNECTIONS (FORMERLY CARE PLUS)</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AMERIGROUP NY LLC (FORMERLY CARE PLUS)</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>ANA CARE INC</td>
<td>EXCLUDE</td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81  
Total Excluded Plans: 0
Exclude AmeriChoose to Indicate Not Accepted

### Exclusion List

<table>
<thead>
<tr>
<th>Managed Care Plans</th>
<th>Exclusion(s): 0 out of 81</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aetna Better Health</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>Affinity Health Plan Inc</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AgeWell LTC</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AlphaCare of New York Inc</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AmeriChoice by United</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AmeriGroup Community Connections (Formerly Care Plus)</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AmeriGroup NY LLC (Formerly Care Plus)</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>UnitedCare Inc</td>
<td>EXCLUDE</td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0

4/10/2015

MMTP Training
AmeriChoice Moved to Exclusion List/Counts Updated

### Exclusion List

<table>
<thead>
<tr>
<th>Managed Care Plans</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>AETNA BETTER HEALTH</td>
<td>Exclude</td>
</tr>
<tr>
<td>AFFINITY HEALTH PLAN INC</td>
<td>Exclude</td>
</tr>
<tr>
<td>AGEWELL LTC</td>
<td>Exclude</td>
</tr>
<tr>
<td>ALPHACARE OF NEW YORK INC</td>
<td>Exclude</td>
</tr>
<tr>
<td>AMERIGROUP COMMUNITY CONNECTIONS (FORMERLY CARE PLUS)</td>
<td>Exclude</td>
</tr>
<tr>
<td>AMERIGROUP NY LLC (FORMERLY CARE PLUS)</td>
<td>Exclude</td>
</tr>
<tr>
<td>AMIDA CARE INC</td>
<td>Exclude</td>
</tr>
<tr>
<td>BLUE CHOICE BLUE CHOICE OPTIO</td>
<td>Exclude</td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 80

<table>
<thead>
<tr>
<th>Exclusion(s): 1 out of 81</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMERICHoice BY UNITED</td>
</tr>
</tbody>
</table>

Total Excluded Plans: 1

4/10/2015 MMTP Training
Move Excluded Plan to Accepted with Include

<table>
<thead>
<tr>
<th>Managed Care Plans</th>
<th>Exclusion(s): 1 out of 81</th>
</tr>
</thead>
<tbody>
<tr>
<td>AETNA BETTER HEALTH</td>
<td>AMERICHoice by UNITED</td>
</tr>
<tr>
<td>AFFINITY HEALTH PLAN INC</td>
<td></td>
</tr>
<tr>
<td>AGEWELL LTC</td>
<td></td>
</tr>
<tr>
<td>ALPHACARE OF NEW YORK INC</td>
<td></td>
</tr>
<tr>
<td>AMERIGROUP COMMUNITY CONNECTIONS (FORMERLY CARE PLUS)</td>
<td></td>
</tr>
<tr>
<td>AMERIGROUP NY LLC (FORMERLY CARE PLUS)</td>
<td></td>
</tr>
<tr>
<td>AMIDA CARE INC</td>
<td></td>
</tr>
<tr>
<td>BLUE CROSS/BLUE CHOICE CORP</td>
<td></td>
</tr>
<tr>
<td>Total Managed Care Plans: 80</td>
<td>Total Excluded Plans: 1</td>
</tr>
</tbody>
</table>

4/10/2015 MMTP Training 62
Plan Accepted, But...

### Exclusion List

<table>
<thead>
<tr>
<th>Managed Care Plans</th>
<th>Exclusion(s): 0 out of 81</th>
</tr>
</thead>
<tbody>
<tr>
<td>AETNA BETTER HEALTH</td>
<td></td>
</tr>
<tr>
<td>AFFINITY HEALTH PLAN INC</td>
<td></td>
</tr>
<tr>
<td>AGEWELL LTC</td>
<td></td>
</tr>
<tr>
<td>ALPHACARE OF NEW YORK INC</td>
<td></td>
</tr>
<tr>
<td>AMERIGROUP COMMUNITY CONNECTIONS (FORMERLY CARE PLUS)</td>
<td></td>
</tr>
<tr>
<td>AMERIGROUP NY LLC (FORMERLY CARE PLUS)</td>
<td></td>
</tr>
<tr>
<td>AMIDA CARE INC</td>
<td></td>
</tr>
<tr>
<td>BLUE CHOICE BLUE CHOICE OPTIC</td>
<td></td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0
Shown at Bottom Of Accepted List Until OK is Clicked

Exclusion List

<table>
<thead>
<tr>
<th>Managed Care Plans</th>
<th>Exclusion(s): 0 out of 81</th>
</tr>
</thead>
<tbody>
<tr>
<td>VNS CHOICE-MLTC PLUS</td>
<td></td>
</tr>
<tr>
<td>VNSNY CHOICE SELECT</td>
<td></td>
</tr>
<tr>
<td>WELLCARE ADVOCATE</td>
<td></td>
</tr>
<tr>
<td>WELLCARE COMPLETE</td>
<td></td>
</tr>
<tr>
<td>WELLCARE LIBERTY</td>
<td></td>
</tr>
<tr>
<td>WELLCARE NMD/FHP/CHP</td>
<td></td>
</tr>
<tr>
<td>AMERICHCHE BY UNITED</td>
<td></td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0
Provider Locations Default to Active Locations

**Provider Details**
Below you will find the details for the current provider.

- **Provider ID:** 01234567
- **Provider Name:** DUE SOUTH MEDICAL
- **Provider Expense:** Yes
- **Transactions Accepted:** Some Managed Care Plans

**Provider Locations**
Add a new location or click current locations to edit.

- [Add New Location]
- [Display Active Locations]
- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

[Save Provider] [Back to Dashboard]
Clear Display Active Locations to See All Locations

**Provider Details**
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: Some Managed Care Plans

**Provider Locations**
Add a new location or click current locations to edit.

- Add New Location
- Display Active Locations
  - Due South Medical 1
  - Due South Medical 3
  - Due South Medical Metro

Edit Managed Care Plan List

Save Provider  Back to Dashboard
Due South Medical 2 is Not Active

Provider Details
Below you will find the details for the current provider.

- Provider ID: 01234567
- Provider Name: DUE SOUTH MEDICAL
- Provider Expense: Yes
- Transactions Accepted: Some Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

- Due South Medical 1
- Due South Medical 2
- Due South Medical 3
- Due South Medical Metro

[Buttons: Save Provider, Back to Dashboard]
Set Display Active Locations to See Only Active

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: Some Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

Add New Location
Display Active Locations
Due South Medical 1
Due South Medical 2
Due South Medical 3
Due South Medical Metro

Edit Managed Care Plan List

Save Provider Back to Dashboard
Due South Medical 2
No Longer Shown

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: Some Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

Add New Location
Display Active Locations

Edit Managed Care Plan List
Save Provider
Back to Dashboard
Add a New Location For Due South Medical Urgent

**Provider Details**

- **Provider ID:** 01234567
- **Provider Name:** DUE SOUTH MEDICAL
- **Provider Expense:** Yes
- **Transactions Accepted:** Some Managed Care Plans

**Provider Locations**

- **Add New Location**
- **Display Active Locations**
  - Due South Medical 1
  - Due South Medical 3
  - Due South Medical Metro

- **Edit Managed Care Plan List**

**Actions:**
- **Save Provider**
- **Back to Dashboard**
Default Location Name is Provider Name
As Location Name is Entered
Title of Popup Matches

- Location: DUE SOUTH MEDICAL
- Address 1: Address 1
- City: City
- State: New York
- Zip: __
- Zip Ext: __
- Phone: (__) __-
- Ext: __
- Is Active: ✔
- Attention: ___

Save Provider  OK  Cancel  Back to Dashboard
DUE SOUTH MEDICAL U

Location: DUE SOUTH MEDICAL U
Address 1: Address 1
Address 2: Address 2
City: City
State: New York
Zip: ___
Zip Ext: ___
Phone: (___) ___
Ext: ___
Is Active: ✓
Attention: ___

OK Cancel
DUE SOUTH MEDICAL UR

Location: DUE SOUTH MEDICAL UR
Address 1: Address 1
Address 2: Address 2
City: City
State: New York
Zip: ___
Zip Ext: ___
Phone: (___) ___
Ext: ___
Is Active: 
Attention: 

OK Cancel

Save Provider Back to Dashboard
DUE SOUTH MEDICAL URG
DUE SOUTH MEDICAL URGE
DUE SOUTH MEDICAL URGEN
DUE SOUTH MEDICAL URGENT

Location: DUE SOUTH MEDICAL URGENT
Address 1: Address 1
Address 2: Address 2
City: City
State: New York
Zip: __
Zip Ext: __
Phone: (___) ___
Ext: 
Is Active: ✓
Attention: 

OK Cancel

Save Provider Back to Dashboard
Enter Address 1
Address 2 is Not Required
Enter City
State Defaults to NY
Enter Zip Code
Zip Ext (+4) is Not Required

DUE SOUTH MEDICAL URGENT

Location: DUE SOUTH MEDICAL URGENT
Address 1: 2112 La Stranglato Way
Address 2: Address 2
City: Yawtown
State: New York
Zip: 12345
Zip Ext: ___
Phone: (__) ___
Ext: ___
Is Active: ✓
Attention: 

OK  Cancel

Save Provider  Back to Dashboard

4/10/2015  MMTP Training  82
Enter Phone Number
Phone Extension is Not Required
Enter Phone Number
Phone Extension is Not Required
Enter Contact Person

Location: DUE SOUTH MEDICAL URGENT
Address 1: 2112 La Stranglato Way
Address 2: Address 2
City: Yawtown
State: New York
Zip: 12345
Zip Ext: ___
Phone: (518) 867-5309
Ext: __
Is Active: □
Attention: Benton Fraser

OK Cancel
Click OK to Add Location
Due South Medical Urgent Added to Locations List

Provider Details
Below you will find the details for the current provider.

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: Some Managed Care Plans

Provider Locations
Add a new location or click current locations to edit.

+ Add New Location

Due South Medical 1
Due South Medical 3
Due South Medical Metro
Due South Medical Urgent

Edit Managed Care Plan List

Save Provider
Back to Dashboard

4/10/2015 MMTP Training
TRANSACTION HISTORY
Transaction History is a Search Function
Use Any Combination of Fields or No Fields at All
Select a Provider

Transaction History
Do a free-form search of transactions to view and export

Provider: [Enclosed field]

Date of Service Start: DUE SOUTH MEDICAL BUNKER RIVER CENTER

Creation Date Start: [Enclosed field]  End: [Enclosed field]  Range: [Enclosed field]

Status: [Enclosed field]

Paid By: [Enclosed field]

Client ID: AA00000A

Search  Reset
Scroll to Due South Medical
Due South Medical Selected Search for Its Transactions
Specify the Date Of Service Range During Which Transactions Occurred

Transaction History
Do a free-form search of transactions to view and export

- Provider: DUE SOUTH MEDICAL
- Date of Service Start: [Field]
- End: [Field]
- Range: [Field]
- Creation Date Start: [Field]
- End: [Field]
- Range: [Field]
- Status: [Field]
- Paid By: [Field]
- Client ID: AA00000A

Search
Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015 MMTP Training
Dates May Be Directly Entered Using the Calendars
Can Be Done For Both Fields
Or Use One of the Five Preset Ranges
The Presets Are Relative to Current Date---March 23, 2015
Month to Date
Start of Current Month to Now
03/01/2015 to 03/23/2015
Select Next Preset

Transaction History
Do a free-form search of transactions to view and export

Provider: DUE SOUTH MEDICAL

Date of Service Start: 03/01/2015  End: 03/23/2015  Range: Month to d

Creation Date Start:  End:  Range:  

Status:  Paid By:

Client ID: AA00000A

Search  Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015  MMTP Training
Last 1 Month
Same Day in Previous Month

---

**Transaction History**
Do a free-form search of transactions to view and export

<table>
<thead>
<tr>
<th>Provider:</th>
<th>DUE SOUTH MEDICAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Service Start:</td>
<td>03/01/2015</td>
</tr>
<tr>
<td>Date of Service End:</td>
<td>03/23/2015</td>
</tr>
<tr>
<td>Range:</td>
<td>Month to d</td>
</tr>
<tr>
<td>Creation Date Start:</td>
<td></td>
</tr>
<tr>
<td>Creation Date End:</td>
<td></td>
</tr>
<tr>
<td>Range:</td>
<td>Last 1 month</td>
</tr>
<tr>
<td>Status:</td>
<td></td>
</tr>
<tr>
<td>Paid By:</td>
<td></td>
</tr>
<tr>
<td>Client ID:</td>
<td>AA00000A</td>
</tr>
</tbody>
</table>

---

**Transactions**

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

---

4/10/2015 MMTP Training 102
02/23/2015 to 03/23/2015

### Transaction History

**Do a free-form search of transactions to view and export**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td>DUE SOUTH MEDICAL</td>
</tr>
<tr>
<td>Date of Service Start</td>
<td>02/23/2015</td>
</tr>
<tr>
<td>Date of Service End</td>
<td>03/23/2015</td>
</tr>
<tr>
<td>Creation Date Start</td>
<td></td>
</tr>
<tr>
<td>Creation Date End</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Paid By</td>
<td></td>
</tr>
<tr>
<td>Client ID</td>
<td>AA00000A</td>
</tr>
</tbody>
</table>

**Transactions**

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015  MMTP Training  103
Select Next Preset

Transaction History
Do a free-form search of transactions to view and export

Provider: DUE SOUTH MEDICAL

Date of Service Start: 02/23/2015  End: 03/23/2015  Range: Last 1 mon

Creation Date Start:   End:                      Range:   

Status:               Paid By:                    

Client ID: AA00000A

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015 MMTP Training
Last 12 Months
Same Day One Year Ago
**03/23/2014 to 03/23/2015**

### Transaction History

**Provider:** DUE SOUTH MEDICAL

**Date of Service Start:** 03/23/2014  
**End:** 03/23/2015

**Creation Date Start:**  
**End:**  

**Status:**  
**Paid By:**

**Client ID:** AA00000A

### Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015

MMTP Training
Select Next Preset

```
Transaction History
Do a free-form search of transactions to view and export

Provider: DUE SOUTH MEDICAL

Date of Service Start: 03/23/2014  End: 03/23/2015  Range: Last 12 mo

Creation Date Start:    End:                Range: 

Status:                 Paid By: 

Client ID: AA00000A

Search  Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>
```
Last Year
All of Previous Calendar Year
Select Next Preset

```
Transaction History
Do a free-form search of transactions to view and export

Provider: DUE SOUTH MEDICAL

Date of Service Start: 01/01/2014  End: 12/31/2014  Range: Last year

Creation Date Start:  End:  Range:

Status:  Paid By:  

Client ID: AA00000A

```

<Transactions Table>
Year To Date
Start of Current Year to Now

Transaction History
Do a free-form search of transactions to view and export

Provider: DUE SOUTH MEDICAL

Date of Service Start: 01/01/2014  End: 12/31/2014

Creation Date Start:   End:   Range: Last year

Status:  Paid By:  Range: Month to date Last 1 month Last 12 months Last year

Client ID: AA00000A

Search  Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>
01/01/2015 to 03/23/2015
Show Status of Transaction
Four Statuses

Transaction History
Do a free-form search of transactions to view and export

Provider: DUE SOUTH MEDICAL

Date of Service Start: 01/01/2015  End: 03/23/2015  Range: Year to date

Creation Date Start:   End:   Range: 

Status: Complete  Draft  Pending Batch  Pending Payment

Paid By: 

Search  Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015  MMTP Training
Show Paid By

Transaction History

Provider: DUE SOUTH MEDICAL

Date of Service Start: 01/01/2015
End: 03/23/2015
Range: Year to date

Creation Date Start:
End:
Range:

Status:
Paid By:

Client ID: AA00000A

Search  Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015  MMTP Training  115
Five Payers

Transaction History
Do a free-form search of transactions to view and export

<table>
<thead>
<tr>
<th>Provider:</th>
<th>DUE SOUTH MEDICAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Service Start:</td>
<td>01/01/2015</td>
</tr>
<tr>
<td>Creation Date Start:</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td></td>
</tr>
<tr>
<td>Client ID:</td>
<td>AA00000A</td>
</tr>
</tbody>
</table>

Search | Reset

Transactions

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Service</th>
<th>Status</th>
<th>Creation Date</th>
<th>Total Amount</th>
<th>Payer</th>
<th>Paid</th>
<th>Deleted</th>
<th>Duplicate</th>
</tr>
</thead>
</table>

4/10/2015 MMTP Training 116
USER MANAGEMENT
User Management
Create and Edit Users

New user submission form:

Provider: DUE SOUTH MEDICAL

Current list of active users by provider:
- bfraser
- rvecchio
- lwelch
- mthatcher
- skowalski
- ebessbriss

Add User
Create New User
Enter First Name

<table>
<thead>
<tr>
<th>Provider:</th>
<th>DUE SOUTH MEDICAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>New user submission form:</td>
<td>Last Name</td>
</tr>
<tr>
<td>Create Username</td>
<td>Select User Role</td>
</tr>
<tr>
<td>Add User</td>
<td></td>
</tr>
<tr>
<td>Current list of active users by provider:</td>
<td>bfraser</td>
</tr>
<tr>
<td></td>
<td>rvecchio</td>
</tr>
<tr>
<td></td>
<td>lwelch</td>
</tr>
<tr>
<td></td>
<td>mthatcher</td>
</tr>
<tr>
<td></td>
<td>skowalski</td>
</tr>
<tr>
<td></td>
<td>ebesbriss</td>
</tr>
</tbody>
</table>

4/10/2015 MMTP Training 119
Enter Last Name

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:

- Buck
- Create Username

Current list of active users by provider:

- bfraser
- rvecchio
- lwelch
- mthatcher
- skowalski
- ebesbriss
Enter Username
Format is determined by sites

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:
Buck          Frobisher
bfrobisher    Select User Role

Current list of active users by provider:
bfraser
rvecchio
lwelch
mthatcher
skowalski
ebesbriss
Select User Role
User or Supervisor
Select Supervisor Role

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:
- Buck
- bfrobisher

Current list of active users by provider:
- bfraser
- rvecchio
- lwelch
- mthatcher
- skowalski
- ebesbriss

Add User

Select User Role
- User
- Supervisor
All Fields Entered
Click Add User to Create
User Added to Active Users

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:
- Buck
- bfrobisher

Current list of active users by provider:
- bfraser
- rvecchio
- kwelch
- mthatcher
- skowalski
- ebobesbriss
- bfrobisher

Success
The User was saved successfully.
System Assigns Temporary Password

Please make note: User: bfrobisher  Password: 12aB34De
Edit A User
Select by Name

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:
- First Name
- Last Name
- Create Username
- Select User Role

Current list of active users by provider:
- bfraser
- rvecchio
- lwelch
- mthatcher
- skowalski
- ebessbriss
- bfrobisher
Select By Edit Icon
User Details
Change All But Username
Lock Detail Controls
Whether User Can Access
Click to Lock
User Cannot Access System