<table>
<thead>
<tr>
<th>Feature</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>PTAR Realtime Entry</td>
<td>14</td>
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<td>PTAR Batch Entry</td>
<td>19</td>
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<tr>
<td>PTAR Spreadsheet Upload</td>
<td>50</td>
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<td>Manage Provider Information</td>
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<td>Invoice Managed Care Plans</td>
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<td>Transaction History</td>
<td>115</td>
</tr>
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<td>Payment History</td>
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</tr>
<tr>
<td>User Management</td>
<td>148</td>
</tr>
</tbody>
</table>
Log Into PTAR

New York State Department of Health Public Transportation Automated Reimbursement System

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.

4/10/2015

PTAR Training
Enter Username
Enter Password
Agree To Usage Conditions

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 laws, 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.

MY DASHBOARD
Enter Client Name
First Character
Enter Client Name
Second Character

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 Spreadsheet Files with Outstanding Errors
No records found.

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

![Dashboard Interface]

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 Transactions

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

No records found.

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>
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</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>
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</table>

Payment History

No records found.

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<tr>
<th>RA</th>
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<th>Payment #</th>
<th>Payment Status</th>
<th>Amount</th>
<th>Payment Action</th>
<th>Addr. Type</th>
<th>Notes</th>
</tr>
</thead>
</table>
PTAR REALTIME ENTRY

[Image of the PTAR interface with options for Realtime Entry, Batch Entry, and Spreadsheet Upload]

4/10/2015 PTAR Training
Start with Submitted Transactions Shown

PTAR Realtime Entry
Enter a single transaction for processing

Client ID: AA00000A

Submission History

1. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER

2. Transaction for ALAISAN, AIMO (ZZ12346A) on 03/18/2015 was submitted on 03/18/2015 at 3:25PM by BFROBISHER

3. Transaction for ENGAZIWA, ISIGULI (ZZ12345A) on 03/18/2015 was submitted on 03/18/2015 at 3:23PM by BFRASER

4. Transaction for HASTA, BILINMEYEN (ZZ12348A) on 03/18/2015 was submitted on 03/18/2015 at 3:20PM by BFROBISHER

5. Transaction for PASIENT, UKJENT (ZZ12349A) on 03/12/2015 was submitted on 03/18/2015 at 2:35PM by BFROBISHER

6. Transaction for ALAISAN, AIMO (ZZ12346A) on 03/16/2015 was submitted on 03/18/2015 at 11:22AM by RVECCHIO
Enter Client ID

PTAR Realtime Entry
Enter a single transaction for processing

Client ID: ZZ12355A
Go

Submission History
1. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
2. Transaction for ALAISAN, AIMO (ZZ12346A) on 03/18/2015 was submitted on 03/18/2015 at 3:25PM by BFROBISHER
3. Transaction for ENGAZIWA, ISIGULI (ZZ12345A) on 03/18/2015 was submitted on 03/18/2015 at 3:23PM by BFRASER
4. Transaction for HASTA, BILINMEYEN (ZZ12348A) on 03/18/2015 was submitted on 03/18/2015 at 3:20PM by BFROBISHER
5. Transaction for PASIENT, UKJENT (ZZ12349A) on 03/12/2015 was submitted on 03/18/2015 at 2:35PM by BFROBISHER
6. Transaction for ALAISAN, AIMO (ZZ12346A) on 03/16/2015 was submitted on 03/18/2015 at 11:22AM by RVECCHIO
Click Go

PTAR Realtime Entry
Enter a single transaction for processing

Client ID: ZZ12355A

Submission History
1. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
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5. Transaction for PASIENVENT, UKJENT (ZZ12349A) on 03/12/2015 was submitted on 03/18/2015 at 2:35PM by BFROBISHER
6. Transaction for ALAISAN, AIMO (ZZ12346A) on 03/16/2015 was submitted on 03/18/2015 at 11:22AM by RVECCHIO
Transaction Added for Client ZZ12355A
PTAR BATCH ENTRY
Start with Today’s Date

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: AA00000A
Date of Service: 03/21/2015
Client Payment Mode: Transit Card
Round Trip: Yes
Transport Program: N/A
Escort Payment Mode: N/A
Location: DUE SOUTH MEDICAL 1

Save

Submission History
1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Enter Client ID

PTAR Batch Entry

Client ID: ZZ12355A
Date of Service: 03/21/2015
Client Payment Mode: Transit Card
Round Trip: Yes
Transport Program: N/A
Escort Payment Mode: N/A
Location: DUE SOUTH MEDICAL 1

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
# Change Date of Service

<table>
<thead>
<tr>
<th>Client ID</th>
<th>ZZ12355A</th>
<th>Date of Service</th>
<th>03/21/2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Payment Mode</td>
<td>Transit Card</td>
<td>Round Trip:</td>
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<tr>
<td>Transport Program</td>
<td>N/A</td>
<td>Escort Payment Mode</td>
<td>N/A</td>
</tr>
<tr>
<td>Location</td>
<td>DUE SOUTH MEDICAL 1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBisher
Change Date of Service

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: ZZ12355A
Date of Service: 03/21/2015

Client Payment Mode: Transit Card
Round Trip: Yes

Transport Program: N/A
Escort Payment Mode: N/A

Location: DUE SOUTH MEDICAL 1

Save  Cancel

Submission History
1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Calendar Shows
Current Date

Client ID: ZZ12355A  Date of Service: 03/21/2015
Client Payment Mode: Transit Card  Round Trip:
Transport Program: N/A
Location: DUE SOUTH MEDICAL 1

Escort Payment Mode:

March 2015

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41 AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36 PM by BFROBISHER
Change to January 8, 2015

Navigate Back

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Go Through February

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41 AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36 PM by BFROBISHER
Stop at January

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASTER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Select January 8
Date Of Service Changed

PTAR Batch Entry

Client ID: ZZ12355A

Date of Service: 01/08/2015

Client Payment Mode: Transit Card

Round Trip: Yes

Transport Program: N/A

Escort Payment Mode: N/A

Location: DUE SOUTH MEDICAL 1

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Select Client Payment Mode

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: ZZ12355A

Client Payment Mode: Transit Card

Date of Service: 01/08/2015

Round Trip: Yes

Transport Program: N/A

Escort Payment Mode: N/A

Location: DUE SOUTH MEDICAL 1

Save Cancel

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Default is Transit Card
Keep Default
Select Round-Trip

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBisher
Default is Yes
Change to No
Round-Trip Changed to No
Select Transport Program

PTAR Batch Entry

- Client ID: ZZ12355A
- Date of Service: 01/08/2015
- Client Payment Mode: Transit Card
- Round Trip: No
- Transport Program: N/A
- Escort Payment Mode: N/A
- Location: DUE SOUTH MEDICAL 1

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Default is N/A (None)
Keep Default

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: ZZ12355A
Date of Service: 01/08/2015

Client Payment Mode: Transit Card
Round Trip: No

Transport Program: N/A
Escort Payment Mode: N/A

Location: DUE SOUTH MEDICAL 1

Save Cancel

Submission History
1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Select Escort Payment Mode
Default is N/A (No Escort)
Select Transit Card
(Indicates There Was Escort)
Escort Payment Mode is Transit Card

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: ZZ12355A
Date of Service: 01/08/2015
Client Payment Mode: Transit Card
Round Trip: No
Transport Program: N/A
Escort Payment Mode: Transit Card
Location: DUE SOUTH MEDICAL 1

Save Cancel

Submission History
1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Select Location

PTAR Batch Entry

Enter PTAR transactions for offline processing

Client ID: ZZ12355A
Date of Service: 01/08/2015
Client Payment Mode: Transit Card
Round Trip: No
Transport Program: N/A
Escort Payment Mode: Transit Card
Location: DUE SOUTH MEDICAL 1

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHHER
Navigate Through List

PTAR Batch Entry

Enter PTAR transactions for offline processing

- **Client ID:** ZZ12355A
- **Date of Service:** 01/08/2015
- **Client Payment Mode:** Transit Card
- **Round Trip:** No
- **Transport Program:** N/A
- **Escort Payment Mode:** Transit Card
- **Location:**
  - DUE SOUTH MEDICAL 1

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBisher
Navigate Through List

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: ZZ12355A
Date of Service: 01/08/2015

Client Payment Mode: Transit Card
Round Trip: No

Transport Program: N/A
Escort Payment Mode: Transit Card

Location: DUE SOUTH MEDICAL 1
          DUE SOUTH MEDICAL 2
          DUE SOUTH MEDICAL 3

Submission History
1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Select Due South Medical 3

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: ZZ12355A
Date of Service: 01/08/2015

Client Payment Mode: Transit Card
Round Trip: No

Transport Program: N/A
Escort Payment Mode: Transit Card

Location:
- DUE SOUTH MEDICAL 1
- DUE SOUTH MEDICAL 1
- DUE SOUTH MEDICAL 2
- **DUE SOUTH MEDICAL 3**

Submission History

1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER

2. Transaction for ANHYSBYS, CLAF (ZZ12347A) on 03/18/2015 was submitted on 03/18/2015 at 3:36PM by BFROBISHER
Location Set as Due South Medical 3
Click Save to Submit
Transaction Submitted for January 8, 2015

PTAR Batch Entry
Enter PTAR transactions for offline processing

Client ID: AA00000A
Date of Service: 03/21/2015

Client Payment Mode: Transit Card
Round Trip: No

Transport Program: N/A
Escort Payment Mode: Transit Card

Location: DUE SOUTH MEDICAL 3

Save

Submission History
1. Transaction for PATIENS, IGNOTA (ZZ12355A) on 01/08/2015 was submitted on 03/21/2015 at 11:02AM by BFROBISHER
2. Transaction for PATIENS, IGNOTA (ZZ12355A) on 03/19/2015 was submitted on 03/19/2015 at 7:41AM by BFRASER
PTAR SPREADSHEET UPLOAD
Upload Transactions In A Spreadsheet

PTAR Spreadsheet Upload

Upload PTAR transactions for offline processing

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: PTAR_Batch_Template_MTA.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

4/10/2015 PTAR Training
Use The Supplied Template

PTAR Spreadsheet Upload
Upload PTAR transactions for offline processing

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: PTAR_Batch_Template_MTA.xls

Submission History

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

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4. 5 of 6 transactions failed initial validations. Submitted by TESTID1 on 03/12/2015 at 1:35PM
Template Downloaded

PTAR Spreadsheet Upload

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: PTAR_Batch_Template_MTA.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

4/10/2015 PTAR Training
Open Template in Excel

PTAR Spreadsheet Upload

- Location: DUE SOUTH 3
- File: Browse to select a file
- Templates: PTAR_Batch_Template_MTA.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

Show all downloads...
## Edit Template

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Client ID</strong> <em>(Medicaid CIN)</em></td>
<td><strong>Date of Service</strong> <em>(MM/DD/YYYY)</em></td>
<td><strong>Roundtrip:</strong> <em>Y = Yes, N = No</em></td>
<td><strong>Client Payment Mode:</strong> <em>T = Transit Card, C = Cash</em></td>
<td><strong>Escort Payment Mode:</strong> <em>T = Transit Card, C = Cash, N = N/A</em></td>
<td><strong>Transport Program:</strong> <em>A = Access A Ride, N = N/A</em></td>
<td><strong>Transport Program:</strong> <em>A = Access A Ride, N = N/A</em></td>
</tr>
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Add Entries to Template
Save After Adding

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<th>C</th>
<th>D</th>
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<tbody>
<tr>
<td>1</td>
<td>Client ID (Medicaid CIN)</td>
<td>Date of Service (MM/DD/YYYY)</td>
<td>Roundtrip: Y = Yes N = No</td>
<td>Client Payment Mode: T = Transit Card C = Cash</td>
<td>Escort Payment Mode: T = Transit Card C = Cash N = N/A</td>
<td>Transport Program: A = Access A Ride N = N/A</td>
</tr>
<tr>
<td>2</td>
<td>ZZ12345A</td>
<td>01/18/2015</td>
<td>Y</td>
<td>T</td>
<td>N</td>
<td>A</td>
</tr>
<tr>
<td>3</td>
<td>ZZ12366A</td>
<td>03/19/2015</td>
<td>N</td>
<td>T</td>
<td>T</td>
<td>N</td>
</tr>
<tr>
<td>4</td>
<td>ZZ12346A</td>
<td>12/27/2014</td>
<td>Y</td>
<td>C</td>
<td>C</td>
<td>N</td>
</tr>
<tr>
<td>5</td>
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<tr>
<td>6</td>
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<td>19</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Browse to Saved Template

PTAR Spreadsheet Upload

Location: DUE SOUTH 3

File: Browse...

Templates: PTAR_Batch_Template_MTA.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

PTAR Spreadsheet Upload
Upload MMTP transactions for offline processing

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: PTAR_Batch_Template_MTA.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 PTAR Training
Examine Errors In An Uploaded Spreadsheet

PTAR Spreadsheet Upload

Upload MMTP transactions for offline processing

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: PTAR_Batch_Template_MTA.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

PTAR Training
Error File Downloaded

PTAR Spreadsheet Upload

Upload MMTP transactions for offline processing

Location: DUE SOUTH 3

File: Browse... Browse to select a file

Templates: PTAR_Batch_Template_MTA.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

Show all downloads...
Open Error File in Excel

PTAR Spreadsheet Upload

Location: DUE SOUTH 3

File: Browse...

Templates: PTAR_Batch_Template_MTA.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

4/10/2015 PTAR Training
<table>
<thead>
<tr>
<th></th>
<th>Client ID (Medicaid CIN)</th>
<th>Date of Service (MM/DD/YYYY)</th>
<th>Roundtrip Y = Yes N = No</th>
<th>Error Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>ZZ000000A</td>
<td>03/02/2015</td>
<td>Y</td>
<td>Client Not Found.</td>
</tr>
<tr>
<td>3</td>
<td>ZZ12345A</td>
<td>01/15/2014</td>
<td>Y</td>
<td>The selected date of service is too old. Please select a recent date of service.</td>
</tr>
<tr>
<td>4</td>
<td>ZZ12366A</td>
<td>02/03/2015</td>
<td>C</td>
<td>Roundtrip value is not valid.</td>
</tr>
<tr>
<td>5</td>
<td>ZZ000000A</td>
<td>10/15/2013</td>
<td>N</td>
<td>Client Not Found., The selected date of service is too old. Please select a recent date of service.</td>
</tr>
<tr>
<td>6</td>
<td>ZZ000000B</td>
<td>01/23/2015</td>
<td>Y</td>
<td>Client Not Found.</td>
</tr>
</tbody>
</table>
Fix Indicated Errors and Upload Only Corrected File

<table>
<thead>
<tr>
<th>Client ID (Medicaid CIN)</th>
<th>Date of Service (MM/DD/YYYY)</th>
<th>Roundtrip Y = Yes N = No</th>
<th>Error Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZZ000000A</td>
<td>03/02/2015</td>
<td>Y</td>
<td>Client Not Found.</td>
</tr>
<tr>
<td>ZZ12345A</td>
<td>01/15/2014</td>
<td>Y</td>
<td>The selected date of service is too old. Please select a recent date of service.</td>
</tr>
<tr>
<td>ZZ12366A</td>
<td>02/03/2015</td>
<td>C</td>
<td>Roundtrip value is not valid.</td>
</tr>
<tr>
<td>ZZ000000A</td>
<td>10/15/2013</td>
<td>N</td>
<td>Client Not Found., The selected date of service is too old. Please select a recent date of service.</td>
</tr>
<tr>
<td>ZZ000000B</td>
<td>01/23/2015</td>
<td>Y</td>
<td>Client Not Found.</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

4/10/2015  PTAR Training
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.

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.

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

Save Provider  Back to Dashboard
Default is Yes

Provider Details

Provider ID: 01234567
Provider Name: DUE SOUTH MEDICAL
Provider Expense: Yes
Transactions Accepted: Yes

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**
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

Buttons:
- Save Provider
- Back to Dashboard
All Managed Care Plans Is Default

Provider Details

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.

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

Display Active Locations

Save Provider
Back to Dashboard
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
- 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

Add New Location
Display Active Locations

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 a new location or click current locations to edit.

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

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 a new location or click current locations to edit.

- Add New Location
- Display Active Locations

Locations:
- Due South Medical 1
- Due South Medical 3
- Due South Medical Metro

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

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>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>AMIRA CARE INC</td>
<td>EXCLUDE</td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0
Exclude AmeriChoice 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></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>AMERICHOICE BY UNITED</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>VITAL CARE INC</td>
<td></td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0
AmeriChoice Moved to Exclusion List/Counts Updated

### Exclusion List

<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 CHOICE/BLUE CHOICE OPTIO</td>
<td></td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 80

Total Excluded Plans: 1
### Exclusion List

<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>AMERICCHOICE BY UNITED</td>
</tr>
<tr>
<td>AFFINITY HEALTH PLAN INC</td>
<td>INCLUDE</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>PLAIN OLDER (FORMERLY CHISEL)</td>
<td></td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 80

Total Excluded Plans: 1
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>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 OPTIONS</td>
<td>ADMINISTERED</td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0

OK  Cancel
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>EXCLUDE</td>
</tr>
<tr>
<td>VNSNY CHOICE SELECT</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>WELLCARE ADVOCATE</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>WELLCARE COMPLETE</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>WELLCARE LIBERTY</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>WELLCARE NMD/FHP/CHP</td>
<td>EXCLUDE</td>
</tr>
<tr>
<td>AMERICHOICE BY UNITED</td>
<td>EXCLUDE</td>
</tr>
</tbody>
</table>

Total Managed Care Plans: 81

Total Excluded Plans: 0
Provider Locations Default to Active Locations

**Provider Details**

- **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

**Buttons:**
- Save Provider
- Back to Dashboard
Clear Display Active Locations to See All Locations

Provider Details

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
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

<table>
<thead>
<tr>
<th>Provider Details</th>
<th>Provider Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider ID:</strong> 01234567</td>
<td><strong>Add New Location</strong></td>
</tr>
<tr>
<td><strong>Provider Name:</strong> DUE SOUTH MEDICAL</td>
<td></td>
</tr>
<tr>
<td><strong>Provider Expense:</strong> Yes</td>
<td><strong>Due South Medical 1</strong></td>
</tr>
<tr>
<td><strong>Transactions Accepted:</strong> Some Managed Care Plans</td>
<td><strong>Due South Medical 2</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Due South Medical 3</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Due South Medical Metro</strong></td>
</tr>
</tbody>
</table>

**Actions:**
- 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.

- Add New Location
- Display Active Locations

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

Save Provider  Back to Dashboard
Add a New Location For Due South Medical Urgent

**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

**Buttons:**

- Save Provider
- Back to Dashboard

4/10/2015

PTAR Training
Default Location Name is Provider Name
As Location Name is Entered
Title of Popup Matches
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

4/10/2015  PTAR Training  92
DUE SOUTH MEDICAL URG

Location: DUE SOUTH MEDICAL URG
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

4/10/2015 PTAR Training 93
DUE SOUTH MEDICAL URGENT
Enter Address 1
Address 2 is Not Required
Enter City
State Defaults to NY

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

OK Cancel

Save Provider Back to Dashboard
Enter Zip Code
Zip Ext (+4) is Not Required
Enter Phone Number
Phone Extension is Not Required

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

OK Cancel
Enter Phone Number
Phone Extension is Not Required
Enter Contact Person
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
Display Active Locations
Due South Medical 1
Due South Medical 3
Due South Medical Metro
Due South Medical Urgent

Save Provider | Back to Dashboard
INVOICE MANAGED CARE PLANS
Invoice Managed Care Plans Displays and Creates Invoices

[Image of Invoice Managed Care Plans interface]

Provider: DUE SOUTH MEDICAL
Threshold Amount: $50

Managed Care Invoices

<table>
<thead>
<tr>
<th>#</th>
<th>Plan ID</th>
<th>Plan Name</th>
<th>Total Amount</th>
<th>Ready to Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01183013</td>
<td>CAPITAL DISTRICT PHYS HLTH PL</td>
<td>$2.75</td>
<td>Invoice</td>
</tr>
</tbody>
</table>
Threshold Amount Works with Invoice All Above Threshold

![Invoice Managed Care Plans]

*Provider:* DUE SOUTH MEDICAL

<table>
<thead>
<tr>
<th>#</th>
<th>Plan ID</th>
<th>Plan Name</th>
<th>Total Amount</th>
<th>Ready to Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01183013</td>
<td>CAPITAL DISTRICT PHYS HLTH PL</td>
<td>$2.75</td>
<td>Invoice</td>
</tr>
</tbody>
</table>

Threshold Amount: $50

[Invoice All Above Threshold]
There Are Four Thresholds
Select A Value To Create Invoices for Amounts Above It
$100 Selected

![Invoice Managed Care Plans](image)

Provider: DUE SOUTH MEDICAL

<table>
<thead>
<tr>
<th>#</th>
<th>Plan ID</th>
<th>Plan Name</th>
<th>Total Amount</th>
<th>Ready to Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01183013</td>
<td>CAPITAL DISTRICT PHYS HLTH PL</td>
<td>$2.75</td>
<td>Invoice</td>
</tr>
</tbody>
</table>

Threshold Amount: $100

[Invoice All Above Threshold]
Invoice All Above Threshold Creates The Invoices
Any Invoices Listed Below That Exceed $100 Would Be Removed From the List

Invoice Managed Care Plans

Provider: DUE SOUTH MEDICAL
Threshold Amount: $100

Invoice All Above Threshold

Managed Care Invoices

<table>
<thead>
<tr>
<th>#</th>
<th>Plan ID</th>
<th>Plan Name</th>
<th>Total Amount</th>
<th>Ready to Invoice</th>
</tr>
</thead>
<tbody>
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<td>1</td>
<td>01183013</td>
<td>CAPITAL DISTRICT PHYS HLTH PL</td>
<td>$2.75</td>
<td>Invoice</td>
</tr>
</tbody>
</table>
Individual Invoices Can Also Be Generated

![Invoice Managed Care Plans](image)

Provider: DUE SOUTH MEDICAL

Threshold Amount: $100

**Managed Care Invoices**

<table>
<thead>
<tr>
<th>#</th>
<th>Plan ID</th>
<th>Plan Name</th>
<th>Total Amount</th>
<th>Ready to Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01183013</td>
<td>CAPITAL DISTRICT PHYS HLTH PL</td>
<td>$2.75</td>
<td>Invoice</td>
</tr>
</tbody>
</table>
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:
Date of Service Start:
DUE SOUTH MEDICAL BUNKER RIVER CENTER
Creation Date Start:   End:   Range:
Status:               Paid By:
Client ID:            

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  PTAR Training  118
Scroll to Due South Medical
Due South Medical Selected Search for Its Transactions
Specify the Date Of Service Range During Which Transactions Occurred
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

---

**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></td>
</tr>
<tr>
<td>Date of Service End:</td>
<td></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

PTAR Training
Month to Date
Start of Current Month to Now
03/01/2015 to 03/23/2015

Transaction History

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  PTAR Training  127
Select Next Preset

Transaction History

Provider: DUE SOUTH MEDICAL
Date of Service Start: 03/01/2015
Creation Date Start:  
Status:  
Client ID: AA00000A

End: 03/23/2015
End:  
Range: Month to d
Range:  
Paid By:  

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>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Last 1 Month
Same Day in Previous Month
02/23/2015 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: 02/23/2015  End: 03/23/2015  Range: Last 1 month

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  PTAR Training  131
### Last 12 Months
#### Same Day One Year Ago

![Transaction History](image)

**Provider:** DUE SOUTH MEDICAL

**Date of Service Start:** 02/23/2015

**End:** 03/23/2015

**Creation Date Start:**

**End:**

**Status:**

**Paid By:**

**Client ID:** AA000000A

**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 PTAR Training
03/23/2014 to 03/23/2015
Select Next Preset
Last Year
All of Previous Calendar Year
01/01/2014 to 12/31/2014

<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 PTAR Training
Select Next Preset
Year To Date
Start of Current Year to Now

### 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>01/01/2014</td>
</tr>
<tr>
<td>Date of Service End</td>
<td>12/31/2014</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>

Choose Date Range:
- Last year
- Month to date
- Last 1 month
- Last 12 months
- Last year
- Year to date

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
PTAR Training
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:

Client ID:
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  PTAR Training
Show Paid By

![Transaction History Form](image)

**Provider:** DUE SOUTH MEDICAL

**Date of Service Start:** 01/01/2015  
**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>
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<th>Paid</th>
<th>Deleted</th>
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</tr>
</thead>
</table>

---

4/10/2015  
PTAR Training
Five Payers

![Transaction History](image)

<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>End:</td>
<td>03/23/2015</td>
</tr>
<tr>
<td>Creation Date Start:</td>
<td></td>
</tr>
<tr>
<td>End:</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td></td>
</tr>
<tr>
<td>Paid By:</td>
<td>Managed Care Plan, Medicaid, Medicaid for Managed Care, None, Provider</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  PTAR Training  143
Payment History Lists
Invoiced Payments

<table>
<thead>
<tr>
<th>Invoiced</th>
<th>Total: $24.75</th>
</tr>
</thead>
<tbody>
<tr>
<td>FCN: N/A</td>
<td>Paid by: NYS CATHOLIC HEALTH PLAN INC</td>
</tr>
<tr>
<td></td>
<td>Previous 1 Next</td>
</tr>
</tbody>
</table>
The Filter Options Are Displayed by Clicking Payment Filter Options
Filter Options are Search Fields
Specify Any Combination

Payment History
View and filter recent payments

Provider: DUE SOUTH MEDICAL

Start Date:  
End Date:  
Range:  

FCN: 15 digits  
RA: 11 digits

Paid By:  

Search  Reset

Payments for Provider: DUE SOUTH MEDICAL

Invoiced  

FCN: N/A  
Paid by: NYS CATHOLIC HEALTH PLAN INC  
Transaction: 4  
Paid on: 03/27/2015  

Total: $24.75

Previous 1 Next
USER MANAGEMENT
User Management
Create and Edit Users

- 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
  - ebessbiss
Create New User
Enter First Name

Provider: DUE SOUTH MEDICAL

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

Current list of active users by provider:
bfraser
rvecchio
lwelch
mth Thatcher
skowalski
ebesbri ss
Enter Last Name
Enter Username
Format is determined by sites

<table>
<thead>
<tr>
<th>Provider:</th>
<th>DUE SOUTH MEDICAL</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>New user submission form:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buck</td>
</tr>
<tr>
<td>Frobisher</td>
</tr>
<tr>
<td>bfrobisher</td>
</tr>
<tr>
<td>Select User Role</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current list of active users by provider:</th>
</tr>
</thead>
<tbody>
<tr>
<td>bfraser</td>
</tr>
<tr>
<td>rvecchio</td>
</tr>
<tr>
<td>lwelch</td>
</tr>
<tr>
<td>mthatcher</td>
</tr>
<tr>
<td>skowalski</td>
</tr>
<tr>
<td>ebesbriss</td>
</tr>
</tbody>
</table>
Select User Role
User or Supervisor

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:
- Buck
- Frobisher
- bfrobisher

Select User Role
- User
- Supervisor

Current list of active users by provider:
- bfraser
- rvecchio
- lwelch
- mthatcher
- skowalski
- ebosbriss
Select Supervisor Role

User Management

Provider: DUE SOUTH MEDICAL

New user submission form:
- Buck
- bfrobisher

Select User Role
- Select User Role
- User
- Supervisor

Current list of active users by provider:
- bfraser
- rvecchio
- lwelch
- mthatcher
- skowalski
- ebesbriss
All Fields Entered
Click Add User to Create
User Added to Active Users
System Assigns Temporary Password

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

Please make note: **User:** bfrobisher  **Password:** 12aB34De
Edit A User

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
- ebesbriss
- bfrobish
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
- ebessay
- bfrobisher
Select By Edit Icon
User Details
Change All But Username
Lock Detail Controls
Whether User Can Access

![User Management Interface](image)

**User Details**

- **Username:** lwelch
- **User Role:** User
- **Provider 1:** DUE SOUTH MEDICAL
- **Provider 2:** N/A
- **Provider 3:** N/A

*Click to lock*

**Buttons:**
- Save
- Cancel
Click to Lock
User Cannot Access System