



PRIMARY PROVIDER MANAGEMENT COMPANY INC.

connectTM

***Reports and File
Transfers***

Reports

Reports

- The [Reports](#) link under the Office Management menu allows you to create two different reports:
 - Member Roster
 - Obtain a list of members with a particular PCP
 - Provider Report
 - Obtain a list of providers

The screenshot displays the Vantage Medical Group web application. The header includes the logo, the text "VANTAGE MEDICAL GROUP Providing Healthcare Management", and navigation links for "Home" and "Log Out". The user is logged in as "Training 1" and has a "Message Center (1 New)". The role is "Default Provider" and the access list is "TRAINING 1".

The main content area is titled "Available Reports" and contains a table with two columns: "Report Name" and "Report Description". The table lists two reports: "Member Roster" and "Provider Report".



Report Name	Report Description
Member Roster	get a list of members with a particular Primary Care Physician
Provider Report	get a list of providers

The left sidebar contains a navigation menu with the following items: Patient Management, Office Management (with sub-items: Eligibility, Claims, Referrals/Auths, Provider Directory, Formulary, Code Lookup, Reports, File Transfer Agent), and Administration (with sub-item: User Preferences).

Reports

Member Roster

- The Member Roster provides a listing of patients assigned to a PCP
 - To Create the Member Roster for a provider:
 - In the Member drop-down list, select the patients to include: All, Active, or Terminated
 - To Select the Criteria:
 - In the drop-down list, select As of, Added Effective, or Terminated date
 - In the Date field, enter the date that corresponds with the criteria (As of, Added Effective, or Terminated date)

Report List		Batch Report Status	
Member Roster Help 			
Selection Criteria			
Member	Active Members <input type="button" value="v"/>	As of <input type="button" value="v"/>	Date 09/08/2010 
Results By	<input checked="" type="radio"/> PCP PROVIDER <input type="button" value="v"/>	<input checked="" type="radio"/> Name <input type="radio"/> NPI	<input type="button" value="Search"/>
	<input type="radio"/> Practice No Practices Available <input type="button" value="v"/>		
Filter By	<input type="checkbox"/> Subscribers Only		
Column Selection			
Available Columns	Member Name Street Address City State Zip Code Home Phone Birth Date Sex	<input type="button" value="Add"/> <input type="button" value="Remove"/>	<input type="button" value="Move up"/> <input type="button" value="Move down"/>
Report Criteria			
Report Results	Display Results <input type="button" value="v"/>	Header	<input type="checkbox"/> Include Selection Criteria <input type="checkbox"/> Include Date
Order By	Choose to sort <input type="button" value="v"/>	Footer	<input type="checkbox"/> Include Selection Criteria <input type="checkbox"/> Include Date
Group by	Choose to group <input type="button" value="v"/>	Lines Per Page	20 <input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Clear"/>			

Reports

Member Roster

- To select a PCP
 - In the PCP field you may either
 - Select the PCP from the drop-down list, or
 - Type in the PCP's name or NPI and click the Search button on the right to search for the PCP

Reports

Member Roster

- Add Available Columns by selecting the information you would like to see, and clicking the add button
- Added columns will appear to the right
 - The order of the columns you select will appear left to right on the report results

The screenshot shows a 'Column Selection' dialog box. On the left, under 'Available Columns', there is a list of fields: Member Name, Street Address, City (highlighted in blue), State, Zip Code, Home Phone, Birth Date, and Sex. In the center, there are two buttons: 'Add' and 'Remove'. On the right, there is a list of selected columns: Member Name, Birth Date, and City. Below this list are two buttons: 'Move up' and 'Move down'.

Reports

Member Roster

- You may sort and group the results under the Report Criteria section
 - Order By – Will order the information by the field you select from the drop-down menu
 - Group By -- Will group the information by the field you select from the drop-down menu
- The Report Results drop-down allows you to select the delivery method of the results:
 - Display Results – Displays the result on your screen
 - Download Delimited file – Downloads the completed file in a text form
 - Download MS Excel – Downloads the completed file in Microsoft Excel format
 - Download PDF – Downloads the completed file in PDF
- You may choose to include information regarding the report in the header and footer of the report such as the selection criteria and date
- You may specify the number of records per page by changing the number in the box next to the Lines Per Page field.

Report Criteria			
Report Results	Download PDF File ▾	Header	<input checked="" type="checkbox"/> Include Selection Criteria <input checked="" type="checkbox"/> Include Date
Order By	Member Name ▾	Footer	<input checked="" type="checkbox"/> Include Selection Criteria <input checked="" type="checkbox"/> Include Date
Group by	City ▾	Lines Per Page	10
<input type="button" value="Submit"/> <input type="button" value="Clear"/>			

Reports

Member Roster

- When you are finished, click submit
- If the report is less than 1,000 lines long, then it will run automatically and either display or download the report, depending on the selection you made
- If the report is greater than 1,000 lines long, the report will run after hours, and be available for download in the File Transfer Agent link under the Office Management Menu

Reports

Provider Report

- The Provider Report generates a list of all providers meeting the search criteria that you specify
 - Provider type: Any type, Clinician, Facility, Pharmacy, or Vendor
 - Specialty
 - Practice Name/ID/NPI
 - Contract Lines
 - Network
 - Hospital Affiliations

Reports

Provider Report

- Once you specify the search criteria, you may add the report columns under Column Selection
- Choose the delivery method under the Report Results drop-down
- Order and group the report
- Select Header and Footer information
- Specify the amount of Lines Per Page

Reports

Provider Report

- When you are finished, click submit
- If the report is less than 1,000 lines long, then it will run automatically and either display or download the report, depending on the selection you made
- If the report is greater than 1,000 lines long, the report will run after hours, and be available for download in the File Transfer Agent link under the Office Management Menu

File Transfer Agent




File Transfer Agent

- **File Transfer Agent**
- The File Transfer Agent (FTA) is a tool that allows **connect™** to act as a conduit for exchanging data files and documents. It allows you to securely transmit files from providers and other users.
- The **File Transfer Agent Inbox** shows the files available for download.

[Inbox](#) [Downloaded](#) [Deleted](#) [Upload](#) [Sent](#)

Pages: (1) Results: 15

[Delete](#)

File Transfer Agent - Inbox						Help 
<input type="checkbox"/>	File Name	File Type	File Size	Sender	Upload Date	Download
<input type="checkbox"/>	labresults_Sally_Smith.png	LNK-R/A	28KB	TRAINING 1	8 Sep 2010 01:19:15 PM	 Download File
<input type="checkbox"/>	labresults_Sally_Smith.png	LNK-R/A	28KB	TRAINING 1	8 Sep 2010 01:18:58 PM	 Download File

File Transfer Agent




- **To view file detail:**
- Click on the file name.
- The **File Detail** window opens giving you the status and detailed information about that file. You will also be given links that allow you to download or view the file from the detail page.

File Transfer Agent

- **To Download a File:**
- Click on the download icon at the far right of the file you wish to download.
- The **Windows File Download** box will appear giving the option of opening this file from the current location or saving it to your computer.
- Select **Open** or **Save** this file.
- Click **OK**.

File Transfer Agent

- **To delete a file:**
- Select the **Check Box** to the left of the file name you want to delete.
- More than one file name may be selected at one time.
- Click **Delete**.
- All selected files will be deleted.

File Transfer Agent - Inbox						Help 
<input type="checkbox"/>	File Name	File Type	File Size	Sender	Upload Date	Download
<input checked="" type="checkbox"/>	labresults_Sally Smith.png	LNK-R/A	28KB	TRAINING 1	8 Sep 2010 01:19:15 PM	 Download File
<input checked="" type="checkbox"/>	labresults_Sally Smith.png	LNK-R/A	28KB	TRAINING 1	8 Sep 2010 01:18:58 PM	 Download File