

3rd Party Coverage Report

County of San Diego

What does this report tell me?

- This report can only show what has been entered by a person or uploaded and matched via MMEF.
- It tells me what clients have insurance policies inserted in Anasazi- 3rd Party Coverage.
- It tells me who the insurances are for each client.
- It tells me if an insurance has been terminated.
- It can also show some data entry errors.

Where do I start?

The screenshot displays a software interface titled "CLINICIAN'S HOMEPAGE 3.0.0.0". On the left, a navigation pane shows a tree structure with "Menu" and "Security" expanded. Under "Menu", "Client Financial Information" is selected, opening a sub-menu. This sub-menu includes "Client Financial Review Menu", "Client 3rd Party Coverage Menu", and "Client Authorizations Menu". The "Client 3rd Party Coverage Menu" is further expanded to show "Client 3rd Party Coverages", "Client 3rd Party Coverages History Maintenance", "Client 3rd Party Coverage Reports", and "California Medi-Cal Real Time Eligibility Determination". The "Client 3rd Party Coverage Reports" item is selected, opening a final sub-menu with "Client 3rd Party Coverage Report", "Client Insurance Eligibility Report", and "Payment Applications Report". A "Launch" button is visible next to the "Client Insurance Eligibility Report" item. The main content area shows a toolbar with "Break The Glass" and "Layout and Filters" buttons, and a message stating "There are no items to show."

CLINICIAN'S HOMEPAGE 3.0.0.0

Open

Menu

Security

Recently Opened Views

Application Menu

- Client Profile
- Scheduler
- Client Assignments
- Client Financial Information**
 - Client Financial Review Menu
 - Client 3rd Party Coverage Menu**
 - Client 3rd Party Coverages
 - Client 3rd Party Coverages History Maintenance
 - Client 3rd Party Coverage Reports**
 - Client 3rd Party Coverage Report
 - Client Insurance Eligibility Report
 - Payment Applications Report
 - California Medi-Cal Real Time Eligibility Determination
 - Client Authorizations Menu
- Client Reviews
- Client Services
- ATP
- System Tools
- Reimbursement

Load template

Client SPD Party Coverage Report (Administrative Access)

Selections1 | Selections2 | Selections3 | Selections4 | Sqrt/Subtotal/Title |

Clients	All		
Pay Sources	All		
Benefit Plans	All		
Pay Source Type	All		
Priority Pop Types	All		
Client ZIP Code	All		
Counties of Residence	All		
Program Category Headings	All		
Program Categories	All		
Units	All		
SubUnits	All		
Unit Types	All		
Assignment Types	All		
Administrative Groups	All		

Click Load

Clear Load Save Batch Print Exit

Choose the template for you

Load Template for Client 3rd Party Coverage Report

Description	Created On	Created By	Last Used
9998- UPDATE INSURANCE REPORT	07/19/2013	8053	11/14/2013
ALL 3rd PARTY COVERAGE	11/18/2013	8053	11/18/2013
Clients With Medi-Cal Coverage	09/01/2009	33	11/18/2013
FSSD Medicare Policy Update Report 111208 C		0	11/12/2013
Program Medicare Clients Report	04/20/2009	41	11/18/2013

Buttons: Delete, Find, Load, Cancel

Select the Template "All 3rd PARTY COVERAGE:"
Then click on load

Tailor your report to your program. Tab 1

Client 3rd Party Coverage Report (Administrative Access)

Selections1 | Selections2 | Selections3 | Selections4 | Sqrt/Subtotal/Title

Clients	All		
Pay Sources	All		
Benefit Plans	All		
Pay Source Type	All		
Priority Pop Types	All		
Client ZIP Code	All		
Counties of Residence	All		
Program Category Headings	All		
Program Categories	All		
Units	Administration		
SubUnits	All		
Unit Types	All		
Assignment Types	A - Admitted Assignments		A
Administrative Groups	All		

Clear Load Save Batch Print Exit

Change to your Unit/ SubUnit

Tab2. Set your time frame

The screenshot shows a software window titled "Client 3rd Party Coverage Report (Administrative Access)". The window has a menu bar with "Selections1", "Selections2", "Selections3", "Selections4", and "Sqrt/Subtotal/Title". Below the menu bar are several input fields:

- Servers: All
- Anniv Months: All
- Recert Months: All
- Coverage in effect on Dates from: 07/01/2012 thru 11/18/2013
- Award Dates from: // thru //
- Entry Dates from: // thru //
- Exclude Clients with P.S.: Private Pay Source (with a search icon) and a value of 9999
- Exclude Clients with B.P.: All (with a search icon)
- Exclude Coverage on Dates from: // thru //

A blue callout box with a pointer to the date range field contains the text: "Enter date range that is still billable to Medi-Cal. (11months back)".

At the bottom of the window is a toolbar with icons for "Clear", "Load", "Save", "Batch", "Print", and "Exit".

Go to Sort/Subtotal/Title Tab.

Client 3rd Party Coverage Report (Administrative Access)

Selections1 | Selections2 | Selections3 | Selections4 | Sort/Subtotal/Title

Segments

- Client Name(2)
- Client Case#(2)
- Pay Src Type
- Pay Source**
- Benefit Plan
- Ext. P/P
- Int. P/P
- ZIP Code
- County
- Program Category Head
- Program Category
- Unit
- SubUnit
- Unit Type
- Administrative Group
- Server
- Assignment Type

Order	PrintTotal	PageBreak
Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SubUnit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client Name(2)	<input type="checkbox"/>	<input type="checkbox"/>
Pay Source	<input type="checkbox"/>	<input type="checkbox"/>

Print the Detail Print the Comments
 Print the SubHeaders
 Print the Notes
 Print the History

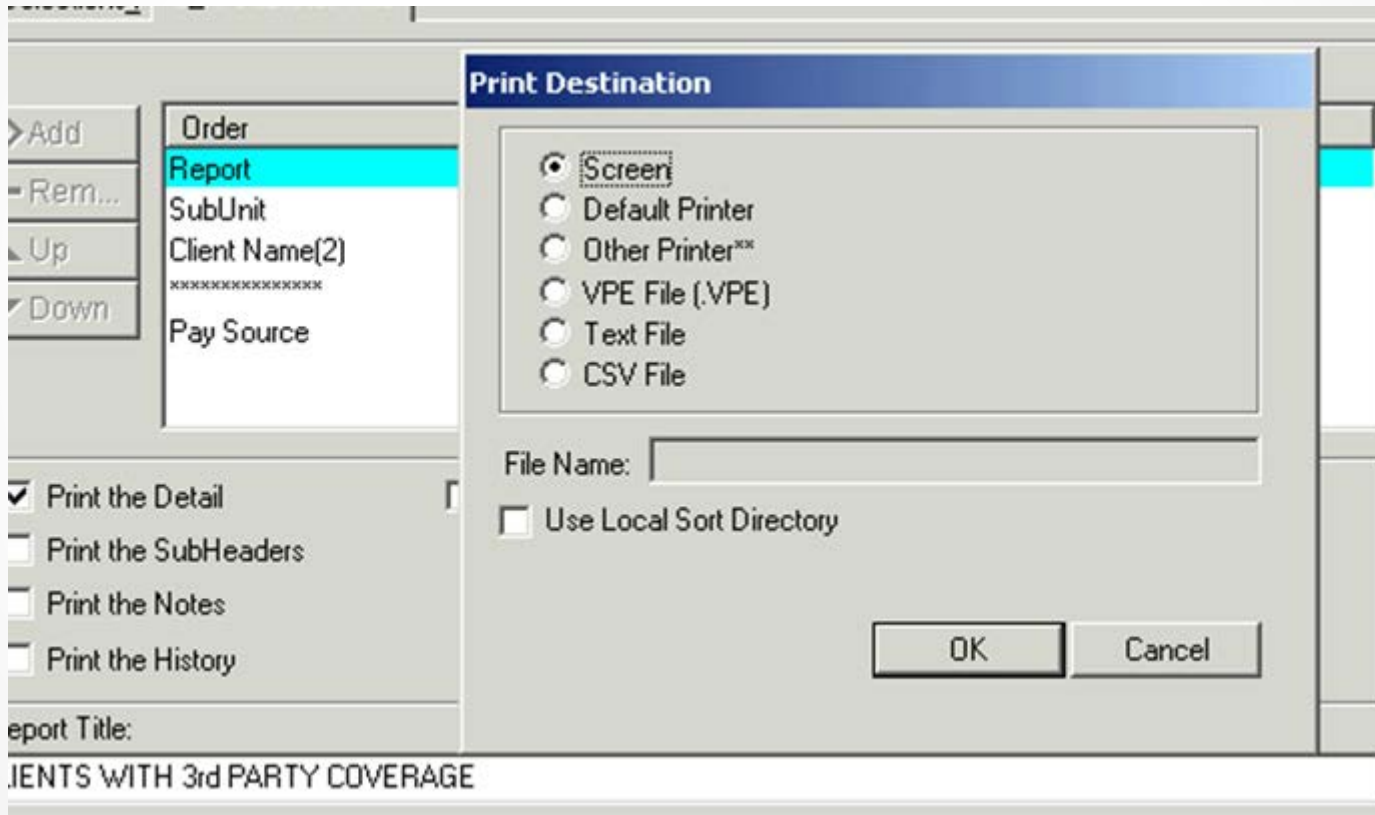
Report Title: CLIENTS WITH 3rd PARTY COVERAGE

Clear Load Save Batch Print Exit

You can rename the report to show when you ran the report. (optional)

You're ready to print.

Print- OK



When to Use this Report?

- This report alerts you of your client's Health Plan coverage prior to billing.
- It allows you to cross check the validity of Pay Sources/Benefit Plans per client to avoid claim denials.
- It allows you to identify where your services should be billing to first.
- You can use this report as a reference when working on your other billing-related reports.

