



**Department
of Health**

Plan of Care Information in MAPP HHTS

File Downloads

March 2024

Topics

- How to Download Files
- How to Save & Format Files
- Identifying Members without a POC
 - Enrollment Download File
 - Billing Support Download File
- Identifying Members with an Expiring POC

How to Download Files

How to Download Files

To download a file, there are **two** options, depending upon how you started the process.

If you searched for a file or were brought to the Download page after clicking 'Download' on a search page, there are already results in the Search Results section.

In this case, you can click the List Action Menu and select "Download File Content". Depending upon your browser type and settings, you may be presented with a dialogue menu asking if you want to 'Open' or 'Save' the file.

The screenshot displays the 'Search File Downloads' interface. It includes search criteria fields for File ID, Downloaded by, File Status, File Type, From Date, and To Date. Below the search criteria is a 'Search Results' section with a table containing one row of data. The 'Download File Content' button in the table is circled in red.

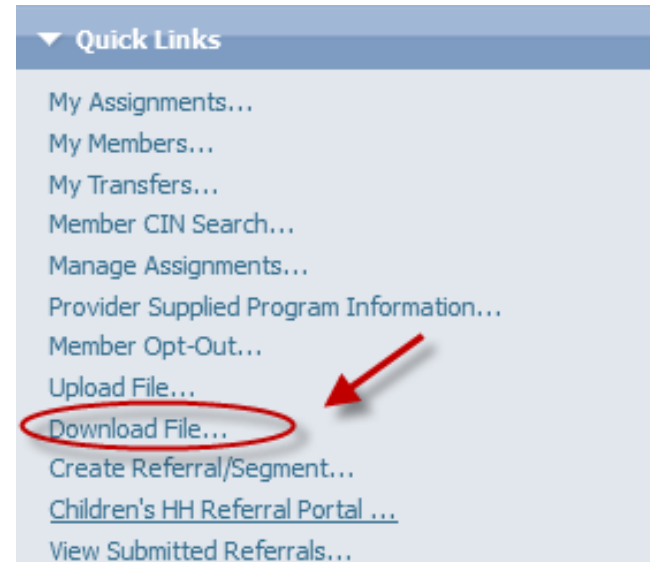
File ID	File Name	File Type	Requested By	Generated On	File Status
	BSD_1806111_02994838_SD_03 0124-031424_031424_1044.csv	Billing Support Download File		3/14/2024 10:44 AM	Processed

How to Download Files

From the MAPP HHTS Home tab, the *Download File* is located under the Quick Links feature.

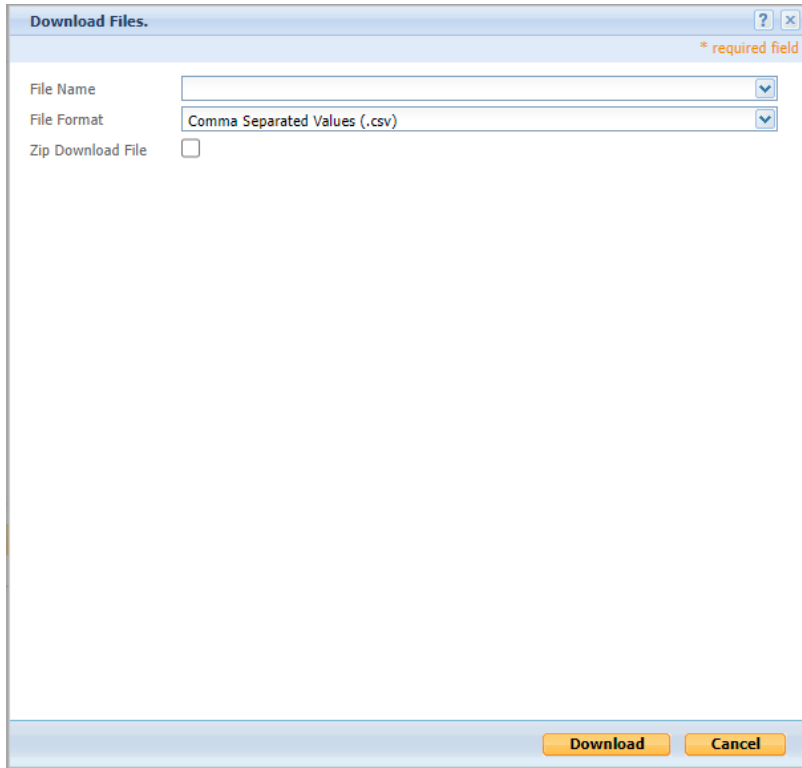
Click the *Download File* link and you will be directed to the Search File Downloads screen.

Click on the 'Download' button that is on the top right of the screen.



How to Download Files

After you have clicked on 'Download', a 'Download Files' pop up will appear. Choose the File Name for which you would like to download.



Download Files. * required field

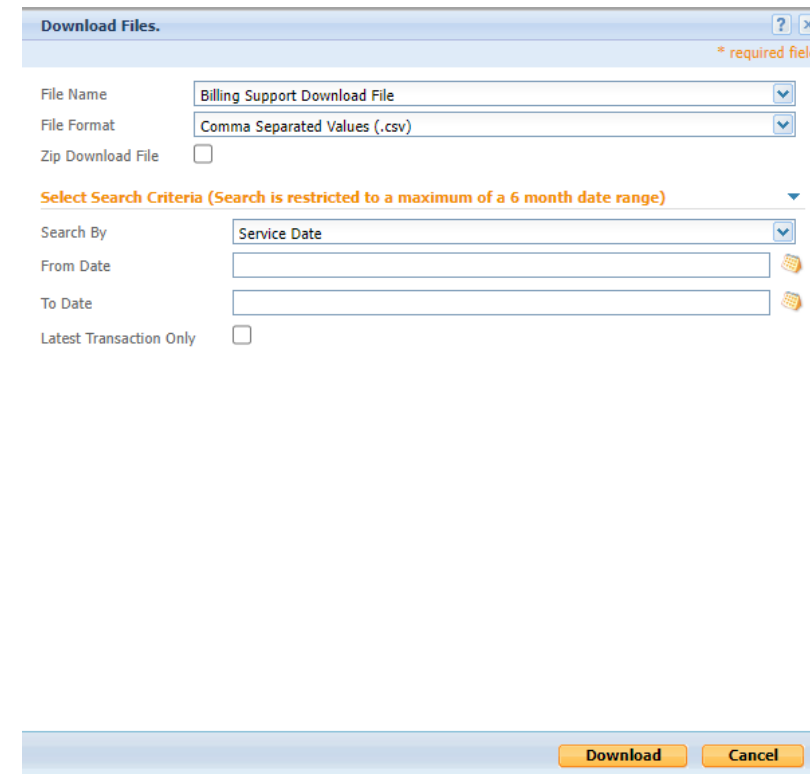
File Name

File Format

Zip Download File

Download Cancel

After selecting a file from the File Name dropdown, additional search criteria may appear based upon the file type selected. In this example, we have selected the Billing Support Download file and are presented with options to filter the results by *Service Date or Last Transaction Date*.



Download Files. * required field

File Name

File Format

Zip Download File

Select Search Criteria (Search is restricted to a maximum of a 6 month date range)

Search By

From Date

To Date

Latest Transaction Only

Download Cancel

How to Download Files

After clicking “Download”, the file will begin to process under the Search Results section of the page. The *File Status* will update to show the throbber displayed while the file completes the download. Most complex files will take approximately 15-20 minutes to process. The speed of the connection and the time of day can impact the download time.

Search Results

File ID	File Name	File Type	Requested By	Generated On	File Status
1806111	BSD_1806111_02994838_SD_030124-031424_031424_1044.csv	Billing Support Download File	HH02994838worker	3/14/2024 10:44 AM	

Once the file download is complete, the *File Status* column will change to **Processed** and the file is available to download.

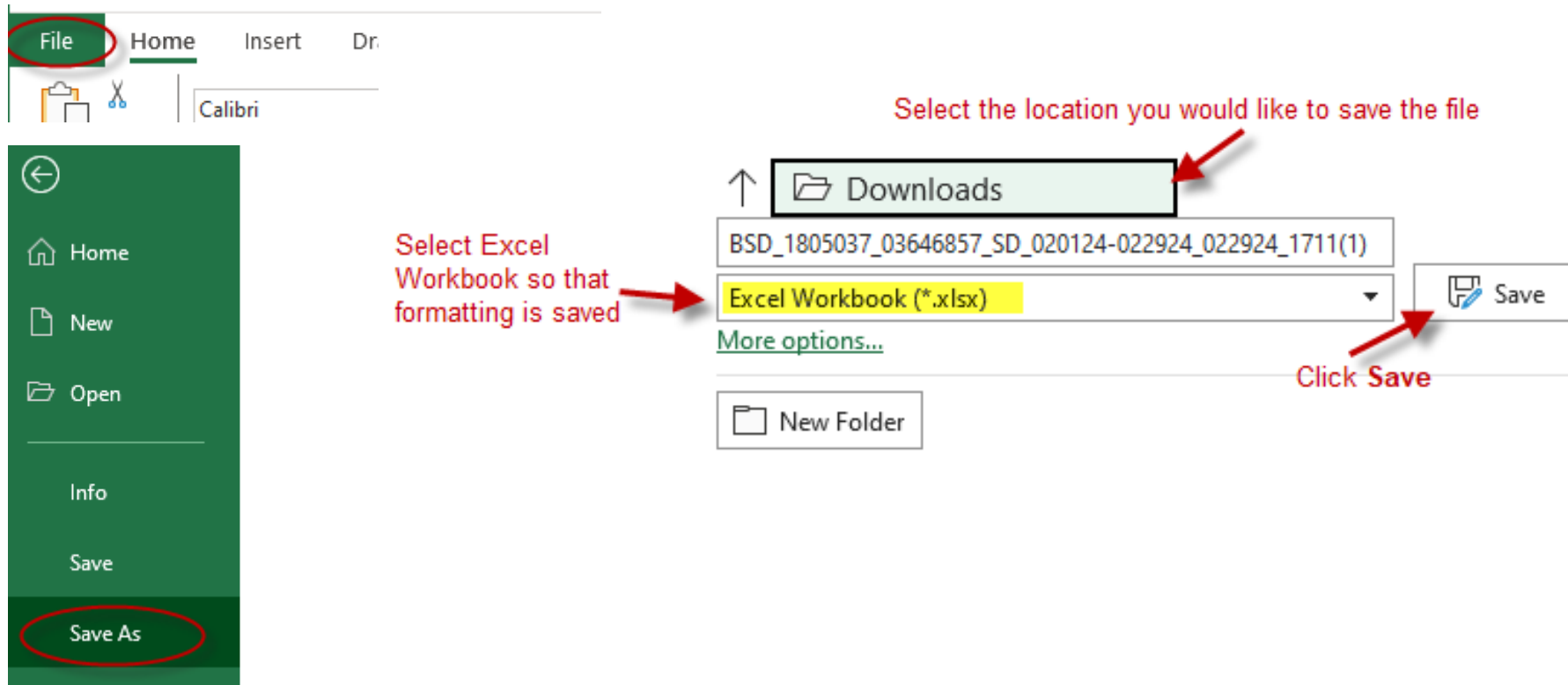
Search Results

File ID	File Name	File Type	Requested By	Generated On	File Status
1806111	BSD_1806111_02994838_SD_030124-031424_031424_1044.csv	Billing Support Download File	HH02994838worker	3/14/2024 10:44 AM	Processed 

How to Save & Format Files

Saving Downloads

Click on *File* and then select *Save as*, then select “Excel Workbook (*.xlsx)” from the drop-down menu. This format will allow for your formatting to save properly.



Formatting the File

Select row 1: **Bold** - **Wrap Text** - **Filter** - **Center**

File Home Insert Draw Page Layout Formulas Data Review View Add-ins

Clipboard Font Alignment

Home

B

Wrap Text

Center

A1

Add/Void Indicator

Select row

A	B	C	D	E	F	G	H	I	J
Add/Void Indicator	Member ID	Service Date	HH MMIS Provider ID	Billing Instance Type	Member Fiscal County Code	MCP MMIS Provider ID	Diagnosis Code	Medicaid Eligibility Status	Pend Reason Code

Cells Editing

Filter

T	U	V	W
Billing Entity Name	Member Zip Code	Member First Name	Member Last Name

Put cursor in cell C2
and from the **view** tab,
Freeze Panes

View Add-ins Help

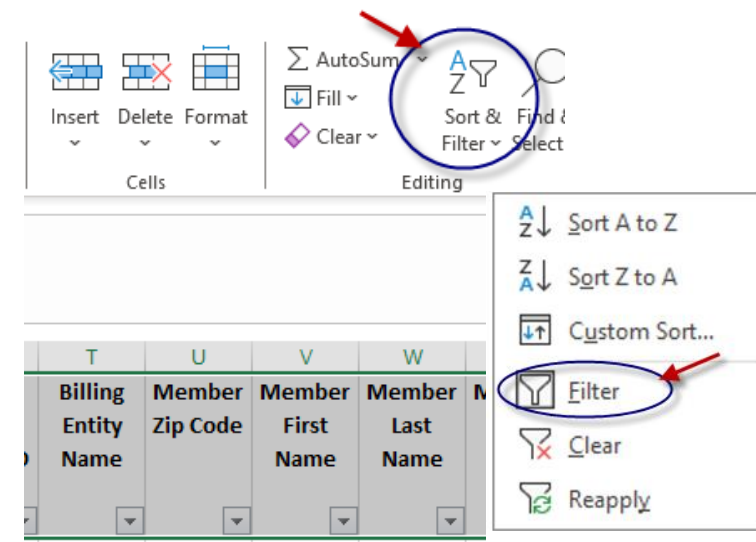
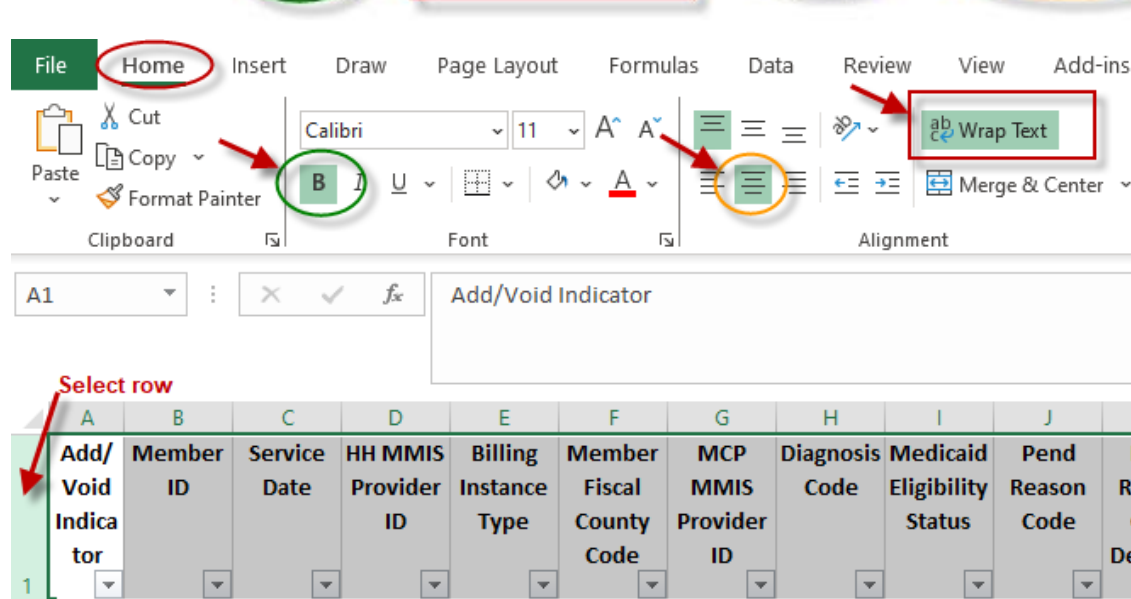
Freeze Panes

Freeze Panes
Keep rows and columns visible while the rest of the worksheet scrolls (based on current selection).

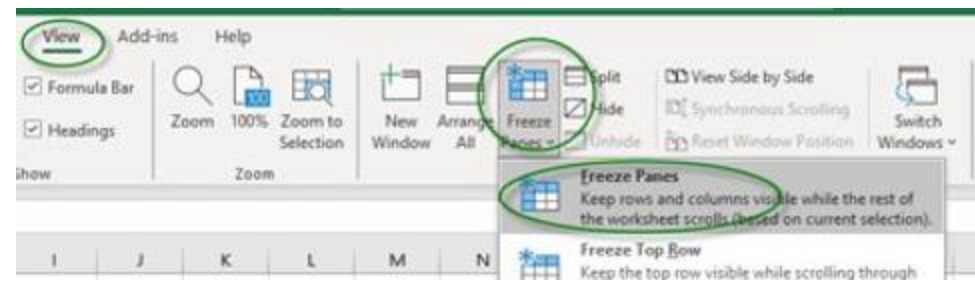
Freeze Top Row
Keep the top row visible while scrolling through

Formatting the File

Select row 1: **Bold** - **Wrap Text** - **Filter** - **Center**



Put cursor in cell C2 and from the **view** tab, Freeze Panes

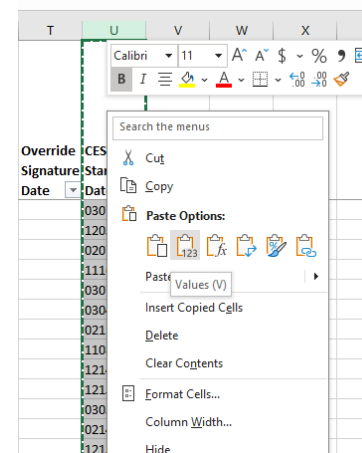
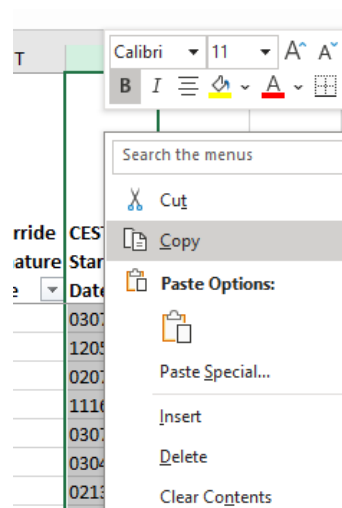


Formatting Date Fields

To preserve the leading zero in a *date field* within a file downloaded from the MAPP HHTS, the value in the *date field* will be “wrapped” in the equal sign and quotations (e.g. =“03072024” for 3/7/24). To convert this text to the date format:

1. Select the entire column, right click, select *Copy*, right click again, select from **Paste Options Values (V) Values**

	U	V	W
id	CEST	CEST	
Signature Start Date	Start	Submission Date	CEST End Date
	03072024	03082024	03072025
	12052023	02152024	02032024
	02072024	02152024	02062025
	11162023	02152024	11152024
	03072024	03082024	05062024
	03042024	03072024	05032024



Formatting Date Fields

2. Select the entire column again, go to **Data** tab, click on *Text to Columns*

Data Review View Add-ins Help

Queries & Connections Properties Edit Links es & Connections

Sort & Filter: Sort, Filter, Clear, Reapply, Advanced

Data Tools: Text to Columns, Flash Fill, Remove Duplicates, Data Validation, Consolidate, Relationships, Manage Data Model

Forecast: What-If Analysis, Forecast Sheet

Outline: Group, Ungroup, Subtotal

Text to Columns

Split a single column of text into multiple columns.

For example, you can separate a column of full names into separate first and last name columns.

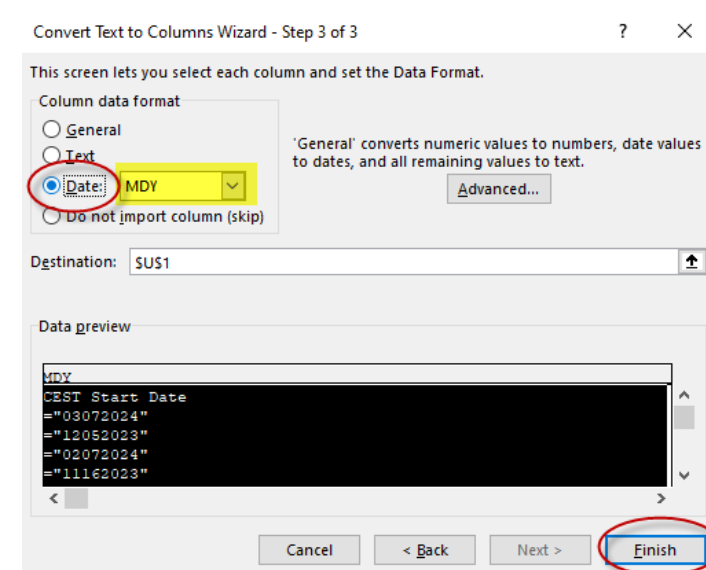
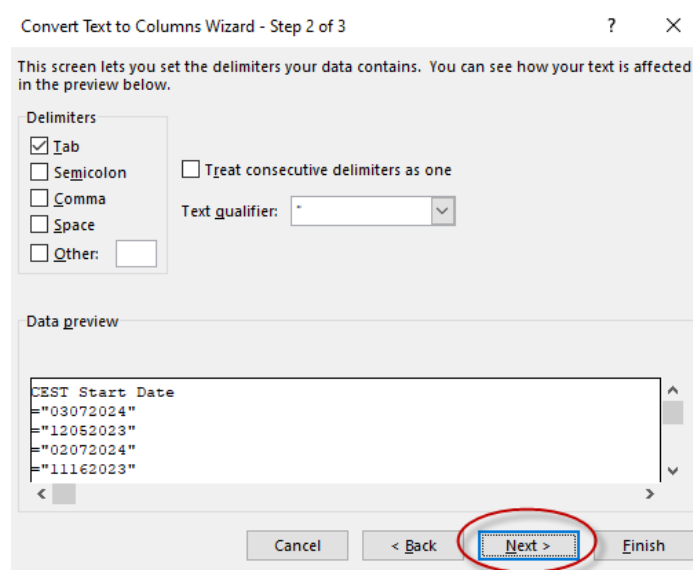
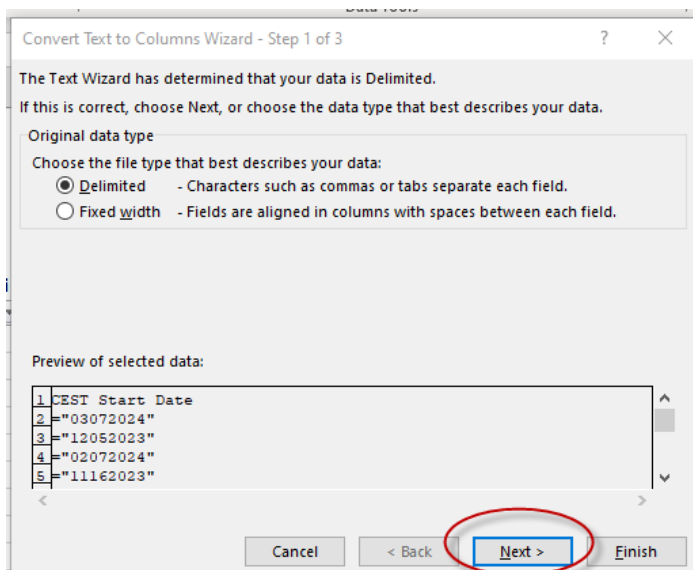
You can choose how to split it up: fixed width or split at each comma, period, or other character.

[Tell me more](#)

G	H	I	J	K	L	P	Q	R	S	T	U	V	W
Assessor	Assessor		HH MMIS	Target	Most recent signed and finalized date for	type of	Continua	Override	Date of	Override	CEST	CEST	
Organization	Organization	HH	Provider	Populati	CANS or	Overric	tion of	Decisio	Decisio	Signature	Start	Submissi	CEST End
name	MMISID	HH Name	ID	on	HCBS	Service	Decision	Decision	Date	Date	Date	Date	Date
	03001310	ST MARYS	03001310		Y						03072024	03082024	03072025
	03001310	ST MARYS	03001310		Y						12052023	02152024	02032024

Formatting Date Fields

3. Click *Next*, *Next*, and then click on *Date* and make sure 'MDY' is selected in the drop box, click *Finish*



Formatting Date Fields

4. You can now view column values as dates

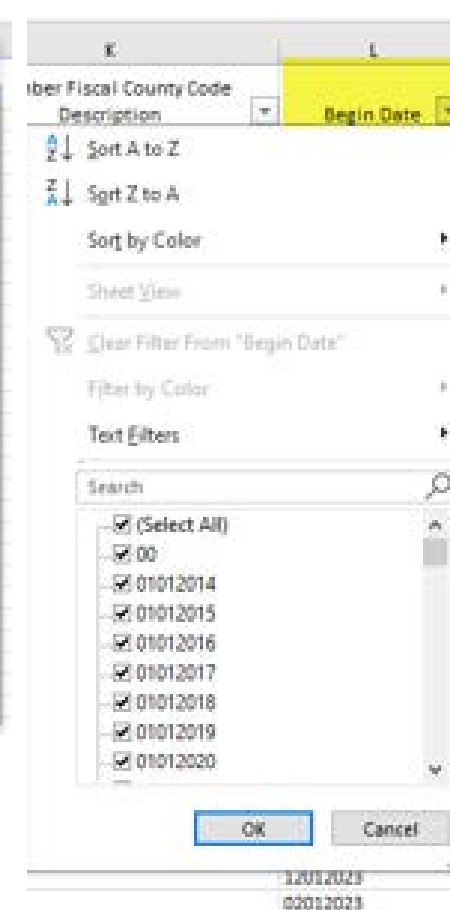
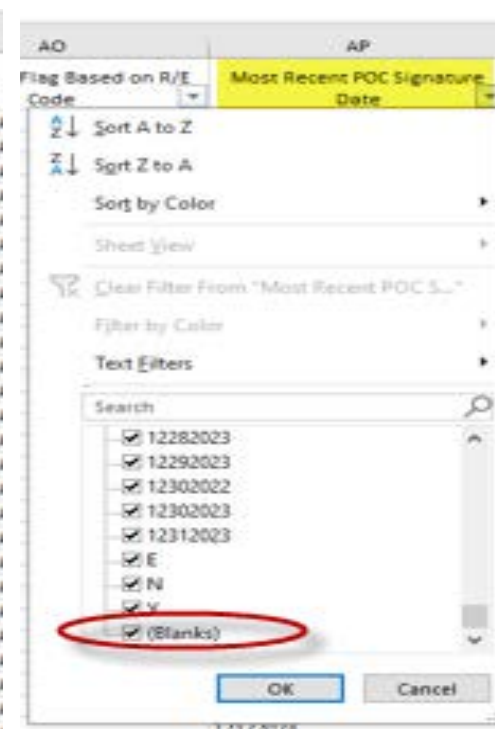
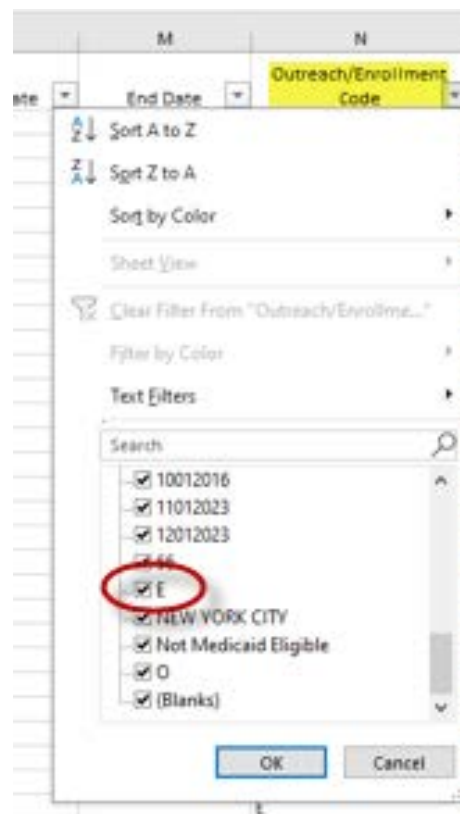
	R	S	T	U	V	W
		Date of	Override		CEST	
	Override	Override	Signature	CEST Start	Submission	CEST End
	Decisio	Decisio	Date	Date	Date	Date
						3/7/20:
						2/3/20:
						2/6/20:
						11/15/20:
						5/6/20:
						5/3/20:
						4/13/20:
						11/7/20:
						12/13/20:
						12/14/20:
						3/5/20:
						2/13/20:
						12/14/20:
						2/15/20:
						12/25/20:
						1/5/20:
						12/14/20:
						1/21/20:
						11/19/20:
						12/26/20:
						1/21/20:
						12/12/20:
						12/14/20:

Identifying Members without a POC

How to Identify Members Without POC

Using the Enrollment Download File (doesn't include Consent to Enroll date)

- Request download for active members
- Filter results to **Outreach/Enrollment Code** field (column **N**) to 'E'
- Filter **Most Recent POC Signature Date** (column **AP**) to (blanks)
- Use **Begin Date** (column **L**) to determine when POC is due (system warnings currently looks at **consent to enroll date**. In May release, system will look at EITHER **consent to enroll date** or **segment begin date** – whichever is more recent)



How to Identify Members Without POC

Using the **Billing Support Download** file
(doesn't include segment begin date or consent date)

- Request BSD most recent month
- Filter results to **Billing Instance Type** (column **E**) field to 'E'
- Filter **Submitted POC Signature Date** (column **CV**) to blank.
- Filter **Validation Code** (column **BZ**) to 'P'
Warning: Member does not have complete Plan of Care submitted to system

Member ID	Service Date	HH MMIS Provider ID	Billing Instance Type
Sort A to Z Sort Z to A Sort by Color Sheet View Clear Filter From "Billing Instance ..." Filter by Color Text Filters Search <input checked="" type="checkbox"/> (Select All) <input checked="" type="checkbox"/> E <input type="checkbox"/> F <input type="checkbox"/> H			

OK Cancel

Adult HCBS and other condition	Other Qualifying Condition	Description of "Other" Health Home	Submitted POC Signature Date
Sort A to Z Sort Z to A Sort by Color Sheet View Clear Filter From "Submitted POC Sig..." Filter by Color Text Filters Search <input type="checkbox"/> 12242023 <input type="checkbox"/> 12252023 <input type="checkbox"/> 12262023 <input type="checkbox"/> 12272023 <input type="checkbox"/> 12282023 <input type="checkbox"/> 12292023 <input type="checkbox"/> 12302023 <input type="checkbox"/> 12312023 <input checked="" type="checkbox"/> (Blanks)			

OK Cancel

Identifying Members with an Expiring POC

Plan of Care Download

The HH, CMA, and MCP can access submitted plans of care using either the ***Plan of Care Download*** file consisting of the plans of care for the downloading provider's members or the Plan of Care PDF, which will contain a single member's plan of care in PDF format.

These documents will contain the information submitted by the HH on the Plan of Care Upload file in addition to other member information housed within the tracking system.

For full details and editing logic, please see the File Specifications Documents.

Using Plan of Care Download File Filters

Download Files.

File Name: Plan of Care Download File

File Format: Comma Separated Values (.csv)

Zip Download File:

Select Plan Of Care Search Criteria

Search By: Search By

From Date:

To Date:

- Current Plan of Care
- Last Transaction Date
- Plan Of Care Effective Date
- POC with Upcoming End Date
- Recently Expired POC

When requesting the **Plan of Care Download** file from the system, providers will be able to use the following filters to dictate what plans of care will be included in the file:

- **Current Plan of Care** - the system will retrieve records for members with active segments and the most recent POC effective, as of the download date. (No from/to dates required for this file selection.)
- **Last Transaction Date** - range that user enters, similar to BSD, that filters records based on the POC Submission Date (enter from/to date for transaction period you're interested in reviewing)
- **Plan of Care Effective Date** - range that user enters, similar to BSD, based on the POC Effective Date. The POC Download file will include all records where the POC effective dates are between and including the selected dates.
- **Plan of Care with Upcoming End Date** – the system will retrieve records for members with active segments and the POC Effective End Dates within the next 2 months.
- **Recently Expired Plan of Care** - the system will retrieve records for members with active segments where member's most recent POC is expired and that POC Effective End Date is within the last 2 months.

Identifying Active Members w Current POC

To identify members with current POCs, use the ***Plan of Care Download*** file and filter the download by selecting the ***Current Plan of Care*** option on the *Download Files* pop-up box.

File will contain members with active segments and the most recent POC effective date, at the time of download. (**No from/to dates required for this file selection.**)

The screenshot shows a 'Download Files' dialog box with the following fields and options:

- File Name:** Plan of Care Download File (circled in red)
- File Format:** Comma Separated Values (.csv)
- Zip Download File:**
- Select Plan Of Care Search Criteria:** (dropdown menu)
- Search By:** Current Plan of Care (circled in red)
- From Date:** (empty field, crossed out with a red X)
- To Date:** (empty field, crossed out with a red X)
- Buttons:** Download and Cancel

Identifying Members with Expired POC

To identify members with an Expired POC, use the ***Plan of Care Download*** file and filter the download by selecting the ***Recently Expired POC*** option on the *Download Files* pop-up box.

The download will contain records for members with active segments where member's most recent POC expired, within the past 2 months.

Download Files. ? × * required field

File Name: Plan of Care Download File

File Format: Comma Separated Values (.csv)

Zip Download File:

Select Plan Of Care Search Criteria

Search By: Recently Expired POC

From Date:

To Date:

Download **Cancel**

Identifying Members with Expiring POC

To identify members with POCs that will EXPIRE soon, use the ***Plan of Care Download*** file and filter the download by selecting the ***POC with Upcoming End Date*** option on the *Download Files* pop-up box.

The download will retrieve records for members with active segments and POC End Dates within the next 2 months.

Download Files. ? x
* required field

File Name: Plan of Care Download File
File Format: Comma Separated Values (.csv)
Zip Download File:

Select Plan Of Care Search Criteria

Search By: POC with Upcoming End Date
From Date:
To Date:

Download Cancel

Identifying Members by POC Transaction Date

To review POCs recently submitted, use the ***Plan of Care Download*** file and filter the download by selecting the ***Last Transaction Date*** option on the *Download Files* pop-up box.

The download results are filtered on the POC Submission Date, based on the from/to date range entered for the transaction period (can select up to a 6 month period).

Download Files. ? x * required field

File Name: Plan of Care Download File

File Format: Comma Separated Values (.csv)

Zip Download File:

Select Plan Of Care Search Criteria

Search By: Last Transaction Date

From Date:

To Date:

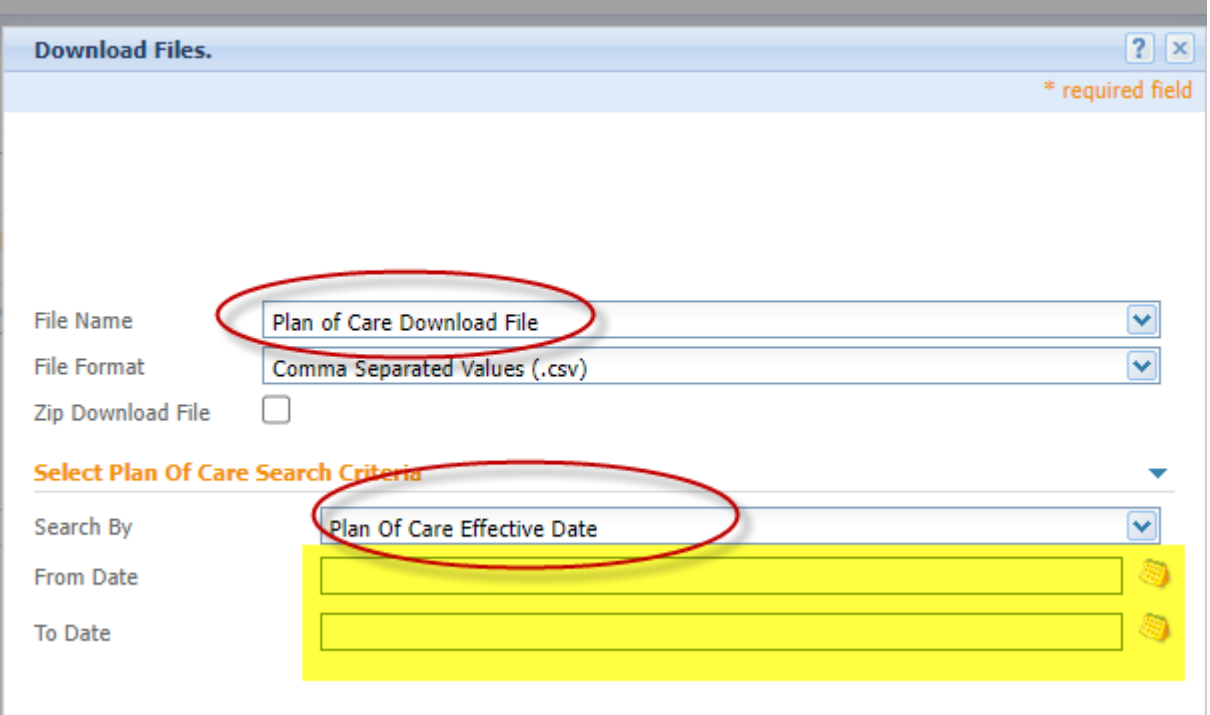
Enter **From Date** and **To Date** to review POCs submitted during a specific date range.

Download **Cancel**

Identifying Members by POC Effective Date

To review POCs recently submitted, use the ***Plan of Care Download*** file and filter the download by selecting the ***Last Transaction Date*** option on the *Download Files* pop-up box.

The download results are filtered on the POC Submission Date, based on the from/to date range entered for the transaction period (can select up to a 6 month period).



Download Files. ? x * required field

File Name Plan of Care Download File

File Format Comma Separated Values (.csv)

Zip Download File

Select Plan Of Care Search Criteria

Search By Plan Of Care Effective Date

From Date

To Date

File Best Practices

1. Remember that larger files take longer to validate and process. To save time and system resources, upload multiple smaller files instead of a single large file.
2. Avoid peak processing times when possible:
 - Weekly: Monday and Friday morning
 - Monthly: First day and Last day of month
3. When downloading, opt to use compressed (.zip) files to potentially increase performance.

Provider Resources

- MAPP HHTS resources such as the File Specifications documents, past presentations, and upcoming HHTS Release information, can be found here: https://www.health.ny.gov/health_care/medicaid/program/medicaid_health_homes/mapp/index.htm
- MAPP HHTS issues and questions should be directed to MAPP Customer Care Center at (518) 649-4335 or MAPP-CustomerCareCenter@cma.com
- All Health Home policy questions and Notification of Change (NOC) forms should be submitted to the DOH Health Home team mailbox found here: <https://apps.health.ny.gov/pubpal/builder/email-health-homes>