

## VX 520 Eligibility Transaction Procedures

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This section details the procedures necessary to complete each of the following eligibility transactions using the Point of Service (POS) device:

- Eligibility Inquiry
- Share of Cost (Spend Down)
- Share of Cost (SOC) Reversal
- Medi-Services (Medical Services Reservation)
- Medi-Services (MS) Reversal

Providers must verify Medi-Cal subscriber (recipient) eligibility prior to rendering services each calendar month. For more information about eligibility or Medi-Services, refer to the *Eligibility: Subscriber Identification* section of the Medi-Cal Part 1 provider manual. For more information about Share of Cost, refer to the *Share of Cost (SOC)* section of the Part 1 provider manual.

If you have questions regarding the operation of the POS device, call the Telephone Service Center (TSC) at 1-800-541-5555 and select the option for POS/Internet inquiries.

### Overview

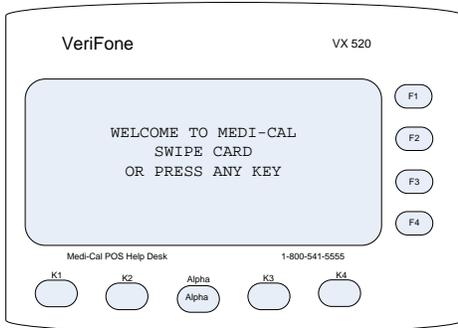
The Medi-Cal eligibility verification system returns an Eligibility Verification Control (EVC) number for each Eligibility Inquiry transaction submitted for subscribers eligible for Medi-Cal services during the specified month.

Note the following:

- You can press <F1> for help in any screen except the Shortcut Key, Response Message and Menu screens.
- The <K4> (EXIT) and <F2>, <F3> and <F4> keys are disabled during the initial entry of transaction information.
- At any time during re-edit, you can press the <K4> (EXIT) key on the keypad to return to the Send/Re-Edit screen.
- To navigate between multiple screen displays, press the <K1> (PREV) key on the keypad to display the previous screen or press the <K2> (NEXT) key on the keypad to display the next screen.

## Beginning a Transaction

Use the following two steps to begin an Eligibility transaction.

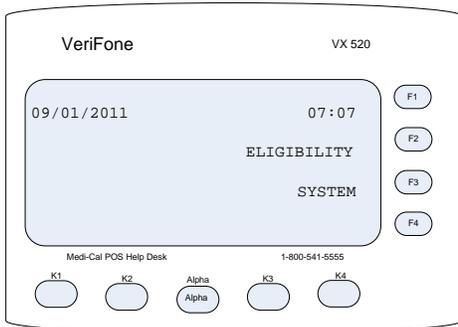


1. The first screen on the POS device is the Welcome screen. To get started, you may either swipe a Benefits Identification Card (BIC) or a Health Access Programs (HAP) card through the card reader, or press any key.

If you swipe a BIC or a HAP card, the subscriber information coded on the magnetic strip automatically displays in certain screens as you advance through the transaction. To accept the information, press <ENTER> when you reach the screen.

If you do not swipe a BIC or HAP card, you must type the requested information in each screen and press <ENTER>.

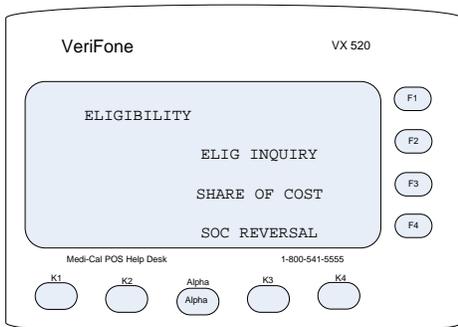
**Note:** You need to obtain the issue date from the BIC or HAP card to successfully submit an Eligibility transaction



2. After swiping a BIC or HAP card or pressing any key, this screen (or a similar screen) will display. This is the Main Menu screen. Press the function <F> key corresponding to "ELIGIBILITY." In this example, press <F2>.

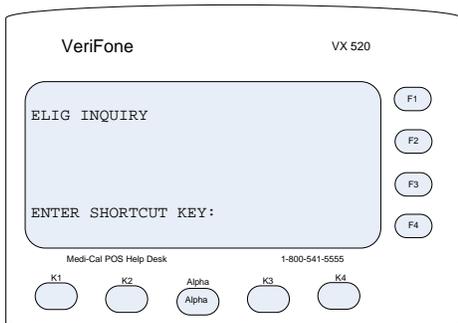
## Performing an Eligibility Inquiry Transaction

This section contains instructions for performing an Eligibility Inquiry transaction using the POS device.



### 1. Eligibility Menu

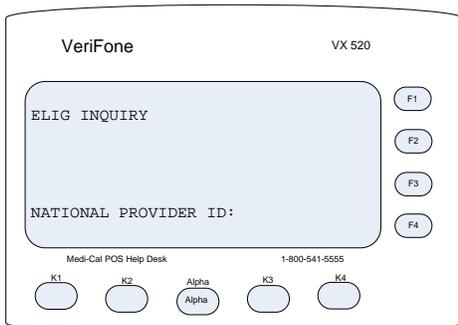
The Eligibility Menu screen displays after performing steps 1 and 2 of the previous section. Select “ELIG INQUIRY” by pressing the corresponding function <F> key. In this example, press <F2>.



### 2. Shortcut Key

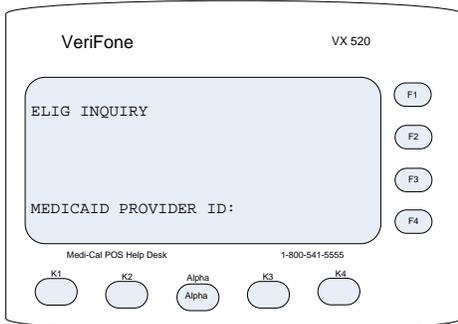
The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

For more information about the shortcut key, refer to the [VX 520 Device System Transactions](#) section of this user guide.



### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your NPI. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise, with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

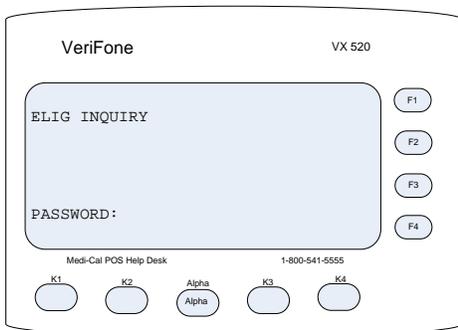


### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the Shortcut Key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <K1> (PREV) key to go to the NPI entry screen.

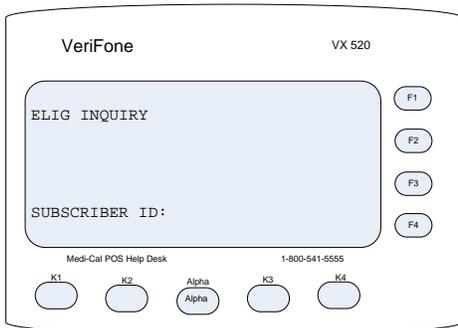
If this screen was validated and you would rather use an NPI value, leave the value in this screen as is, press the <K1> (PREV) function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.



### 4. Password

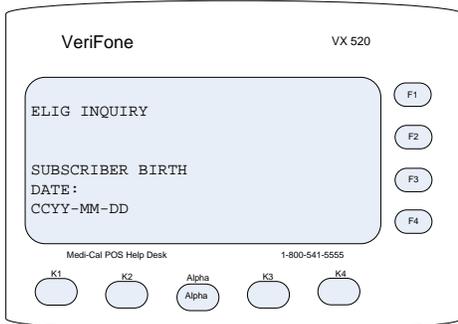
The POS device will prompt you to enter your password, which is your Provider Identification Number (PIN). Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

Press the <K1> (PREV) key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <K1> (PREV) key displays the Medicaid Provider ID. If valid data was entered in the NPI field, pressing the <K1> (PREV) key displays the NPI.



### 5. Subscriber ID

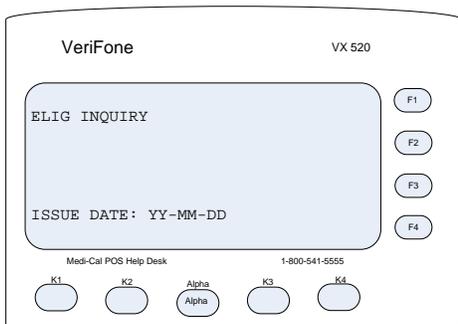
The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.



6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

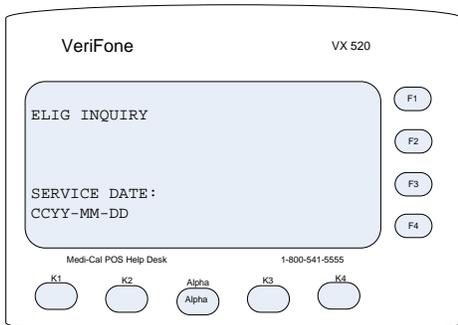
**Note:** If you are billing for services to a newborn infant using the mother's ID number, **you must type the mother's birth date in this screen**, not the infant's.



7. Issue Date

The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

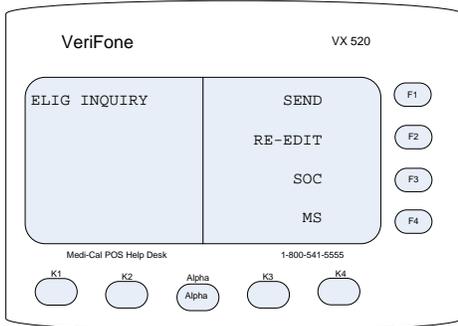
**Note:** If the subscriber presents two BICs, advise the subscriber to destroy the card with the older issue date.



8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".

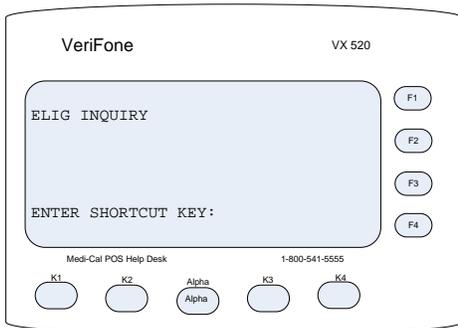
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### 9. Send/Re-Edit Screen

After all Eligibility Inquiry screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

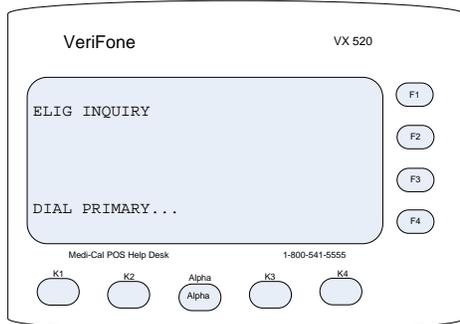
- Press the corresponding <F> (SEND) key to submit your Eligibility Inquiry transaction to the Medi-Cal eligibility verification system. Continue at step 11.
- Press the corresponding <F> (RE-EDIT) key to edit your entries. Continue at step 10.
- Press the corresponding <F> (SOC) key to perform a Share of Cost transaction.
- Press the corresponding <F> (MS) key to make a Medi-Services **request for** reservation.



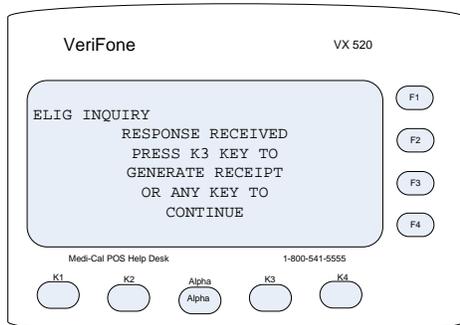
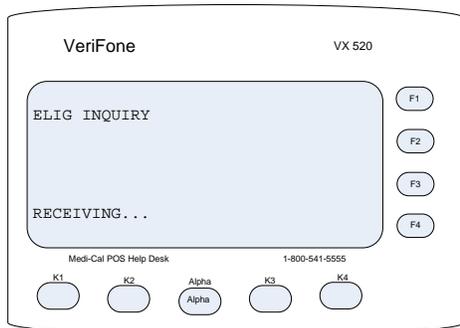
10. If you pressed (RE-EDIT) in step 9, the POS device will display the first screen of your Eligibility Inquiry transaction (the Shortcut Key screen). You can scroll through the screens by pressing <K1> (PREV) and <K2> (NEXT) keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <K4> (EXIT), or by continuing to press <K2> (NEXT) or <ENTER> until the Send/Re-Edit screen again displays. Press the corresponding <F> (SEND) key to submit the transaction to the Medi-Cal eligibility verification system.



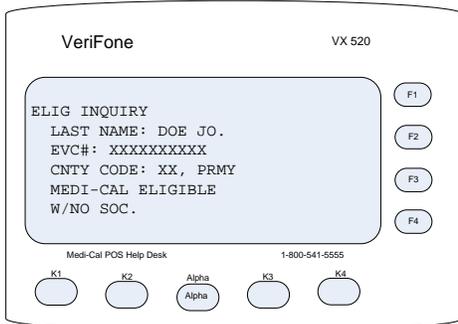
11. Several screens display, including the screens at left, while the transaction is processing.



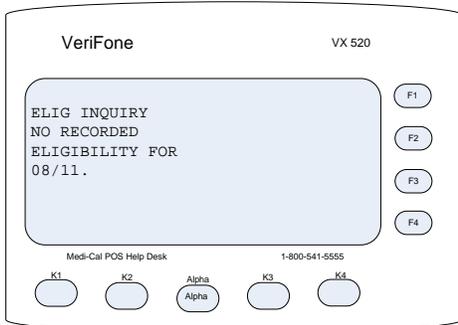
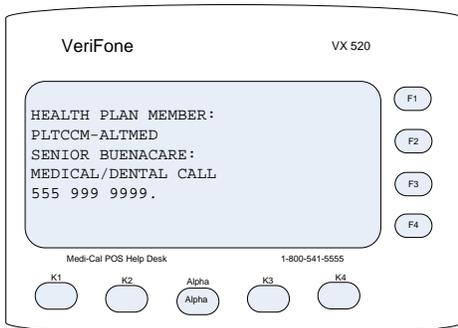
12. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing the <K3> (PRINT) key on the keypad.

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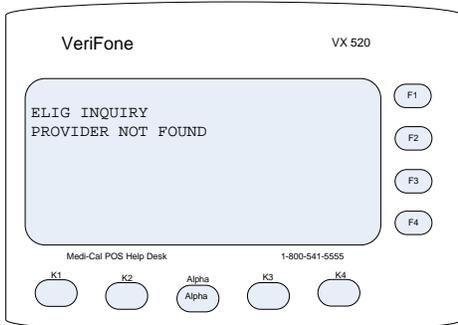


13. If the subscriber is eligible, the POS device will display an eligibility response message that includes an Eligibility Verification Control (EVC) number. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen to perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.



14. If the subscriber is not eligible, the POS device will display a “NO RECORDED ELIGIBILITY FOR (MONTH) (YEAR)” message. Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen.

**Note:** Providers need to verify that the information entered was correct before denying Medi-Cal services to the subscriber.

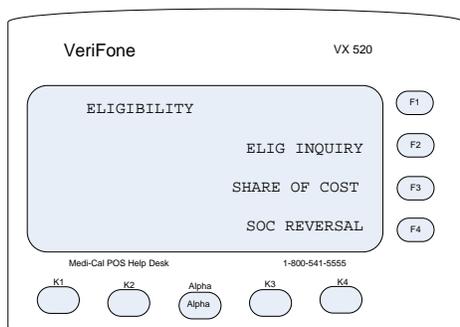


15. If the transaction is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press the corresponding <F> (RE-EDIT) key.

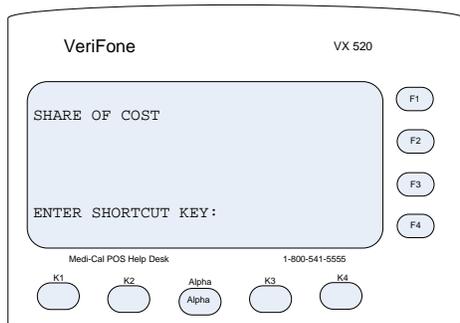
## Performing a Share of Cost Transaction

This section contains instructions for performing a Share of Cost (Spend Down) transaction using the POS device.



### 1. Eligibility Menu

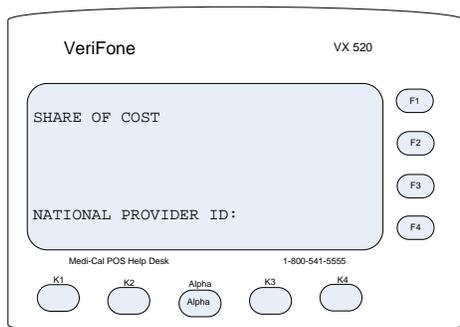
The Eligibility Menu screen displays after performing steps 1 and 2 of the “Beginning a Transaction” section. Select SHARE OF COST by pressing the corresponding function <F> key. In this example, press <F3>.



### 2. Shortcut Key

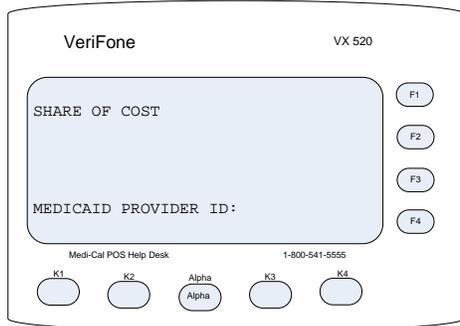
The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

For more information about the shortcut key, refer to the [VX 520 Device System Transactions](#) section of this user guide.



### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your NPI. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise, with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

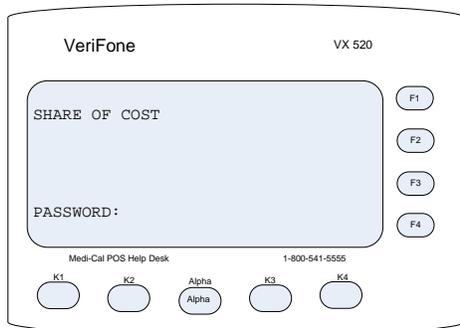


### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the Shortcut Key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <K1> (PREV) key to go the NPI entry screen.

If this screen was validated and you would rather use an NPI value, leave the value in this screen as is, press the <K1> (PREV) function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.

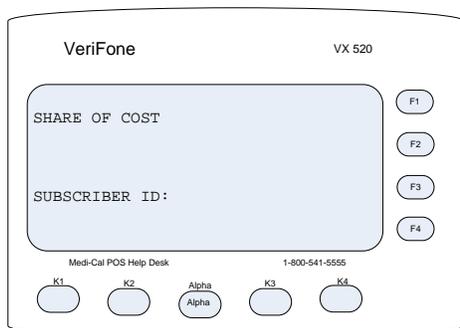


### 4. Password

The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

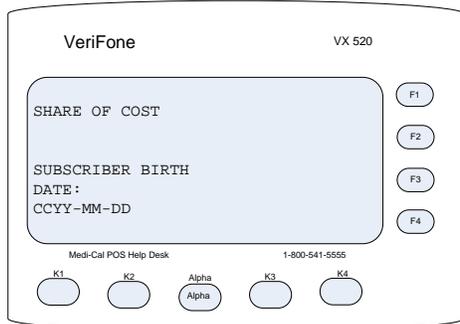
Press the <K1> (PREV) key to go to the prior field entered.

If valid data was entered in the Medicaid Provider ID field, pressing the <K1> (PREV) key displays the Medicaid Provider ID. If valid data was entered in the NPI field, pressing the <K1> (PREV) key displays the NPI.



### 5. Subscriber ID

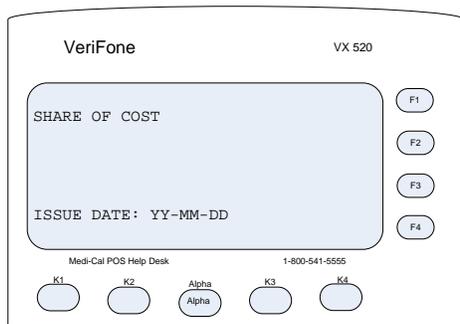
The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.



6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

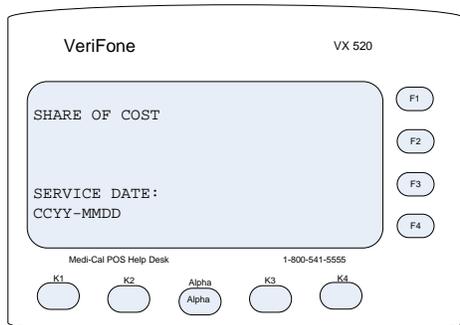
**Note:** If you are billing for services to a newborn infant using the mother's ID number, **you must type the mother's birth date in this screen**, not the infant's.



7. Issue Date

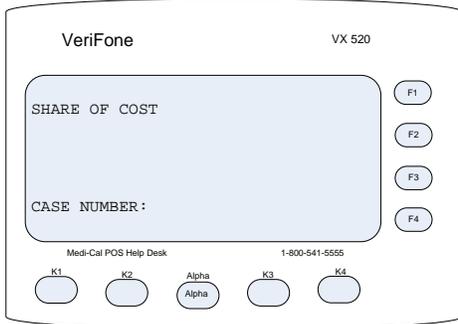
The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

**Note:** If the subscriber presents two BICs, advise the subscriber to destroy the card with the older issue date.



8. Service Date

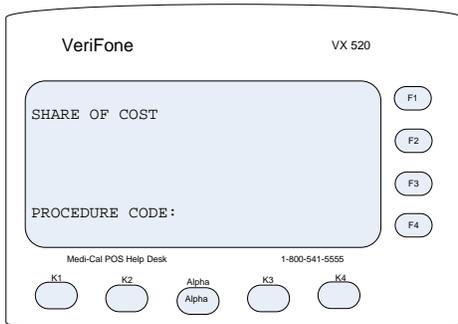
The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".



9. Case Number

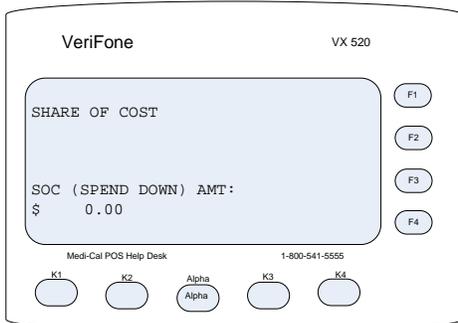
The POS device will prompt you to enter a case number. Type the case number and press <ENTER>, or press <ENTER> to bypass this screen. You only need to enter a case number if the subscriber is affected by the Sneede v. Kizer lawsuit and presents a Share of Cost Case Summary form listing all the subscriber's case numbers. For more information, refer to the *Share of Cost (SOC)* section of the Part 1 provider manual.

**Note:** If the subscriber has multiple case numbers, you must submit a separate SOC transaction for each case number the subscriber wants to clear.



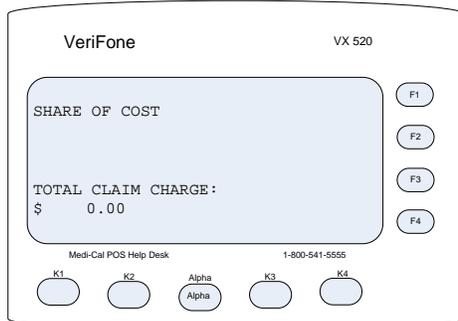
10. Procedure Code

The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.



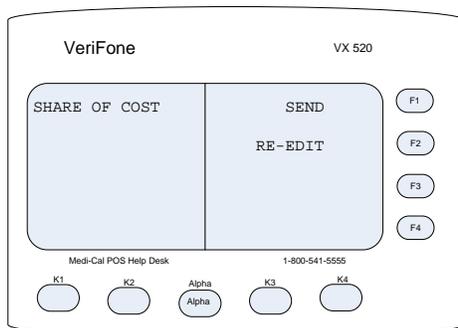
11. SOC (Spend Down) Amount

The POS device will prompt you to enter the SOC (spend down) amount, also referred to as a Share of Cost or patient paid amount. Type the spend down amount and press <ENTER>. You may enter up to \$99999.99 in this screen.



## 12. Total Claim Charge

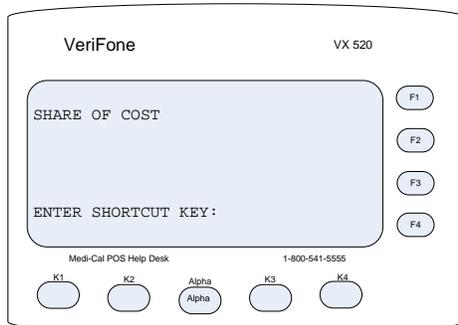
The POS device will prompt you to enter the total claim charge. Type the total charges for the services rendered and press <ENTER>. You may enter up to \$99999.99 in this screen.



## 13. Send/Re-Edit Screen

After all SOC screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

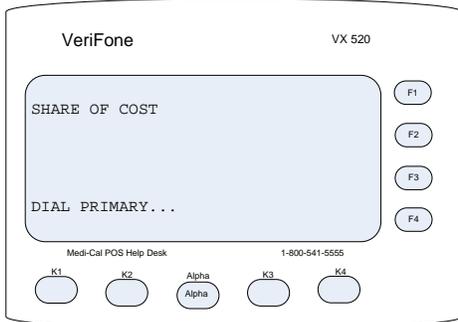
- Press <F1> (SEND) to submit your Share of Cost transaction to the Medi-Cal eligibility verification system. Continue at step 15.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 14.



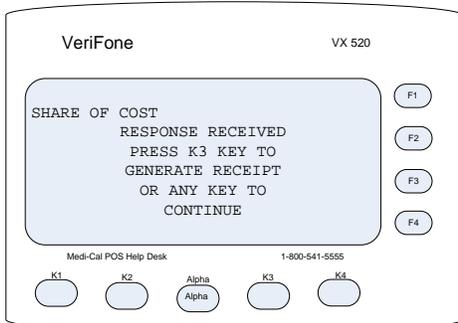
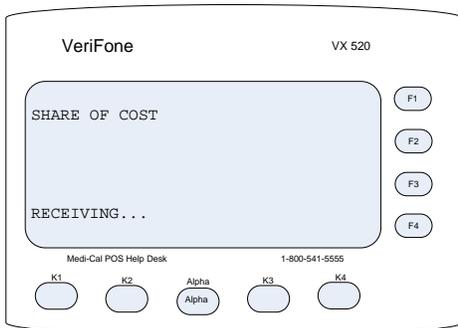
- ## 14.
- If you pressed <F2> (RE-EDIT) in step 13, the POS device will display the first screen of your SOC transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <K2> (NEXT) and <K1> (PREV) keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <K4> (EXIT) or by continuing to press <K2> (NEXT) or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

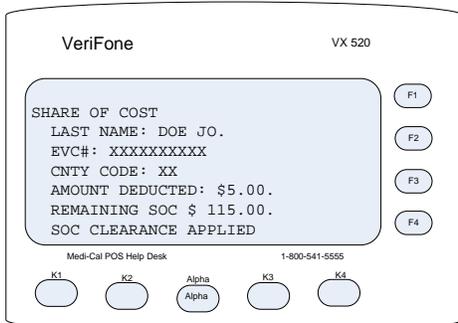


15. Several screens display, including the screens at left, while the transaction is processing.

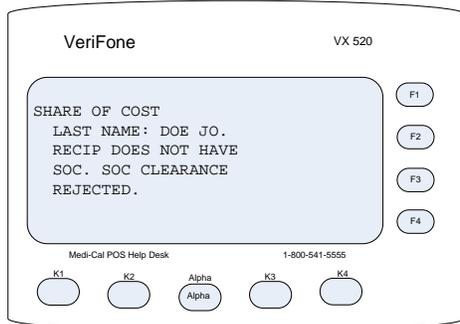


16. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

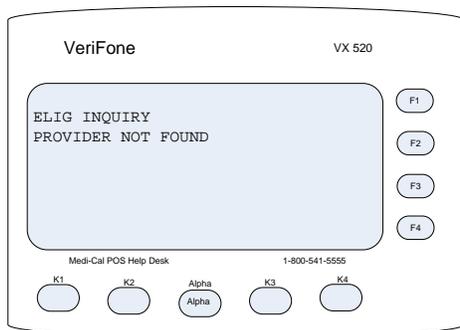
When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing the <K3> (PRINT) key on the keypad.



17. If the subscriber has a SOC, the POS device will display a response message indicating that the SOC clearance was applied. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen



18. If the subscriber does not have a SOC, the POS device will display a response message indicating that the SOC clearance was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.



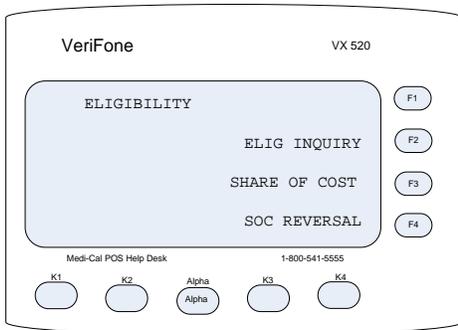
19. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

## Performing a SOC Reversal Transaction

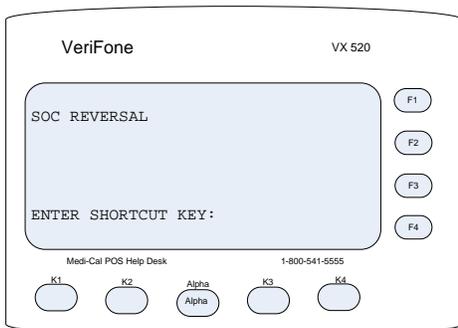
This section contains instructions for performing an SOC Reversal transaction using the POS device.

SOC reversals may only be performed for partial clearance prior to when the subscriber is certified as eligible. Once a subscriber has been certified as having met the SOC, reversal transactions can no longer be performed.



### 1. Eligibility Menu

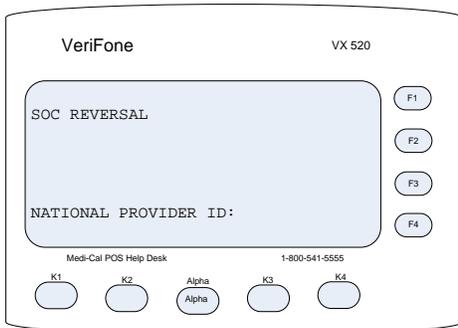
The Eligibility Menu screen displays after performing steps 1 and 2 of the "Beginning a Transaction" section. Select "SOC REVERSAL" by pressing the corresponding function <F> key. In this example, press <F4>.



### 2. Shortcut Key

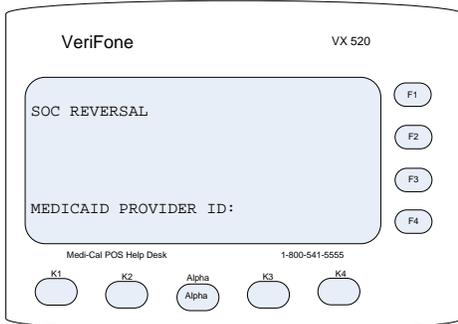
The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

For more information about the shortcut key, refer to the [VX 520 Device System Transactions](#) section of this user guide.



### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your NPI. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise, with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

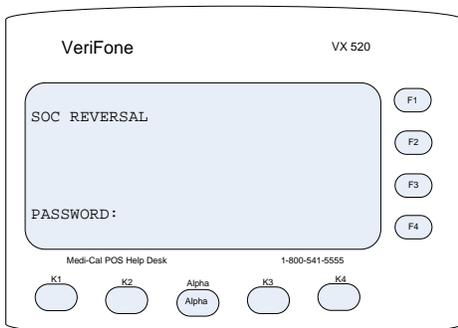


### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the Shortcut Key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <K1> (PREV) key to go the NPI entry screen.

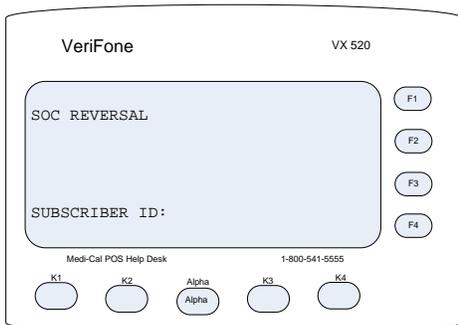
If this screen was validated and you would rather use an NPI value, leave the value in this screen as is. Press the <K1> (PREV) function key to go to the NPI entry screen. After you validate a NPI entry by pressing <ENTER>, the value in this screen will be purged.



### 4. Password

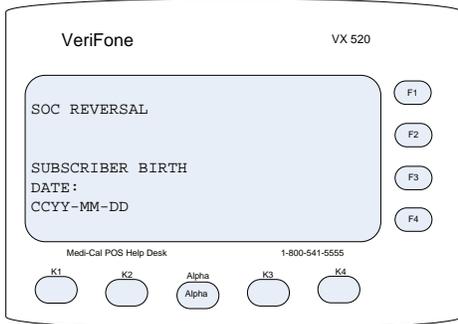
The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

Press the <K1> (PREV) key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <K1> (PREV) key displays the Medicaid Provider ID. If valid data was entered in the NPI field, pressing the <K1> (PREV) key displays the NPI.



### 5. Subscriber ID

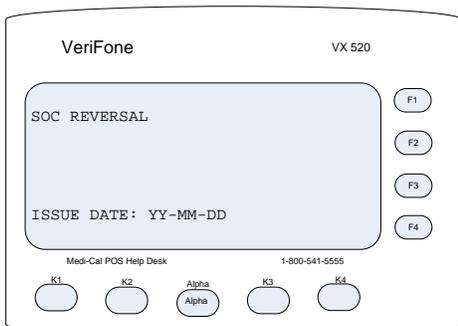
The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.



6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

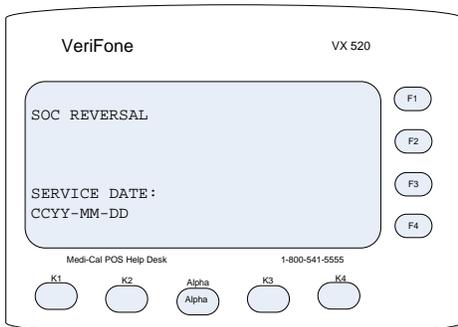
**Note:** If you are billing for services to a newborn infant using the mother's ID number, **you must type the mother's birth date in this screen**, not the infant's.



7. Issue Date

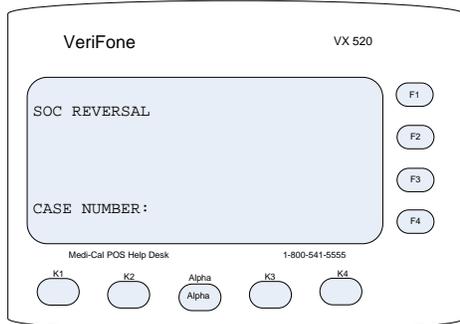
The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

**Note:** If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.



8. Service Date

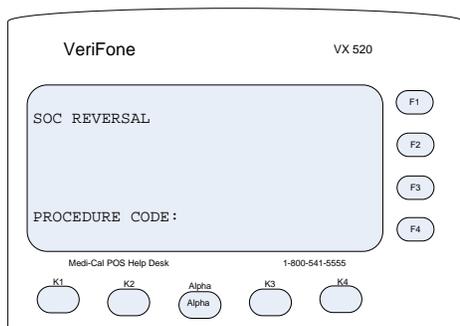
The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".



**9. Case Number**

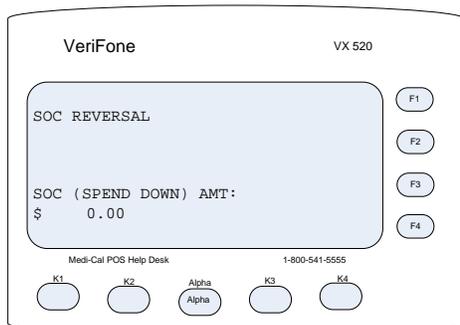
The POS device will prompt you to enter a case number. Type the case number and press <ENTER>, or press <ENTER> to bypass this screen. You only need to enter a case number if the subscriber is affected by the Sneed v. Kizer lawsuit and presents a Share of Cost Case Summary form listing all the subscriber's case numbers. For more information, refer to the *Share of Cost (SOC)* section of the Part 1 provider manual.

**Note:** If the subscriber has multiple case numbers, you must submit a separate SOC transaction for each case number the subscriber wants to clear.



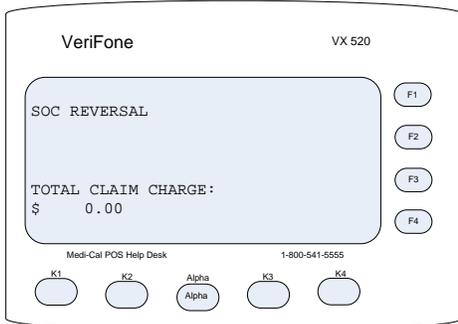
**10. Procedure Code**

The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.



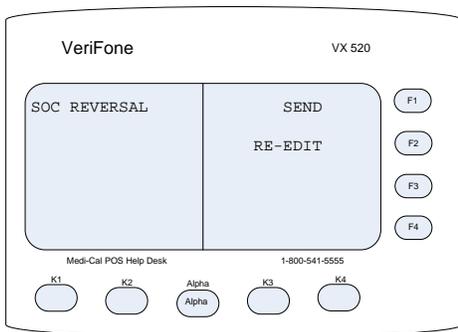
**11. SOC (Spend Down) Amount**

The POS device will prompt you to enter the SOC (spend down) amount, also referred to as a Share of Cost or patient paid amount. Type the spend down amount and press <ENTER>. You may enter up to \$99999.99 in this screen.



**12. Total Claim Charge**

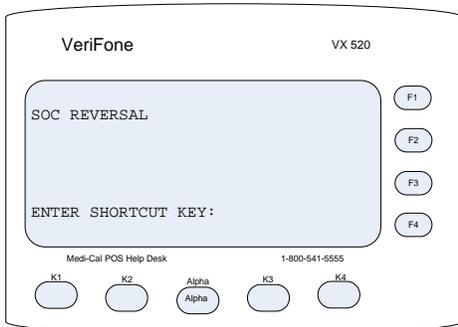
The POS device will prompt you to enter the total claim charge. Type the total charges for the services rendered and press <ENTER>. You may enter up to \$99999.99 in this screen.



**13. Send/Re-Edit Screen**

After all SOC Reversal screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

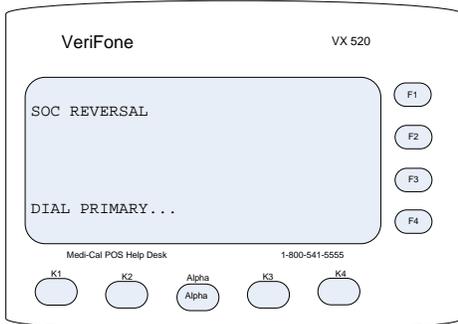
- Press <F1> (SEND) to submit your SOC Reversal transaction to the Medi-Cal eligibility verification system. Continue at step 15.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 14.



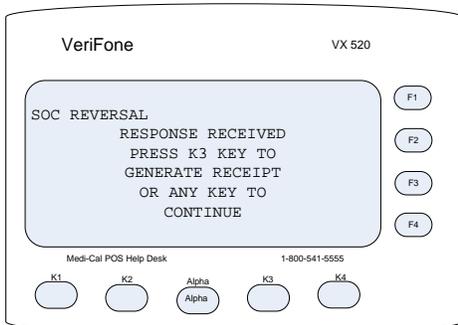
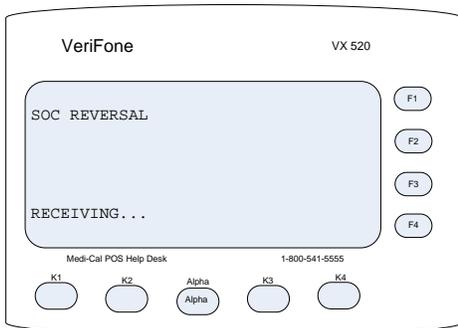
**14. If you pressed <F2> (RE-EDIT) in step 13, the POS device will display the first screen of your SOC Reversal transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <K2> (NEXT) and <K1> (PREV) keys.**

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <K4> (EXIT) or by continuing to press <K2> (NEXT) or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

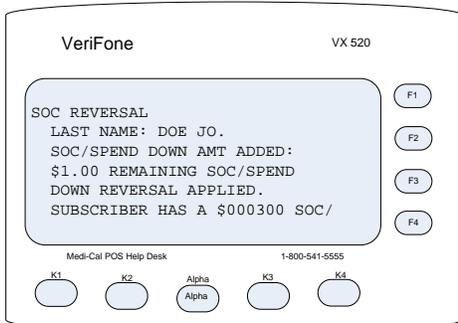


15. Several screens display, including the screens at left, while the transaction is processing.

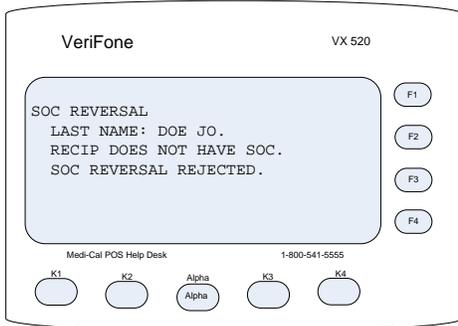


16. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

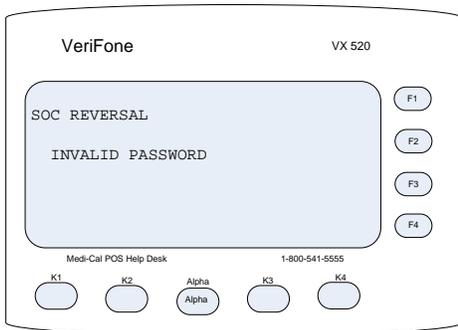
When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing the <K3> (PRINT) key on the keypad.



17. If the subscriber has a SOC, the POS device will display a response message indicating that the SOC reversal was applied. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.



18. If the subscriber does **not** have a SOC, the POS device will display a response message indicating that the SOC reversal was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

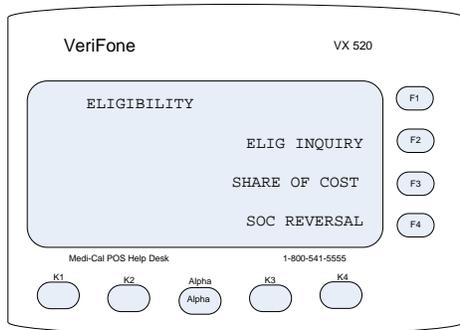


19. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.  
  
Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

**Performing a Medi-Services Request**

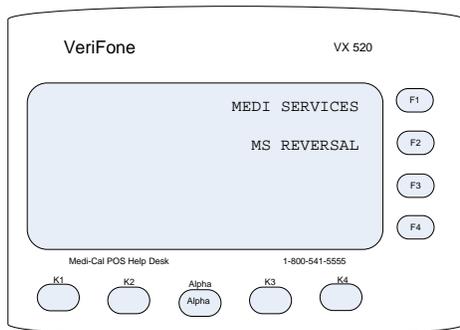
This section contains instructions for performing a Medi-Services (Medical Services Reservation) Request using the POS device.

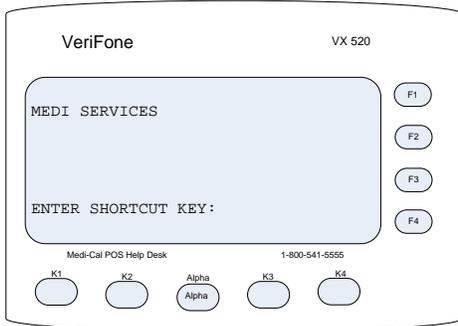
Only certain providers can reserve and submit claims for Medi-Services. For more information about Medi-Services, refer to the *Eligibility: Subscriber Identification* section of the Part 1 provider manual.



**1. Eligibility Menu**

The Eligibility Menu screen displays after performing steps 1 and 2 of the “Beginning a Transaction” section. Press the <K2> (NEXT) key on the keypad. Select MEDI SERVICES by pressing the corresponding function <F> key.





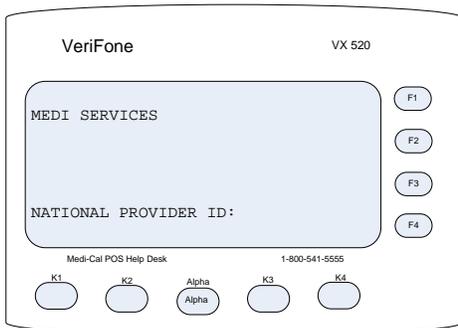
## 2. Shortcut Key

The POS device will prompt you to enter your shortcut key.

- If you have activated this feature, type your shortcut key and press <ENTER>.
- If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the National Provider ID screen.
- If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen.

Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

For more information about the shortcut key, refer to the [VX 520 Device System Transactions](#) section of this user guide.

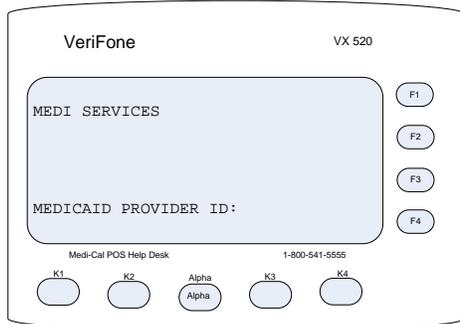


## 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your NPI.

- Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>.

Otherwise, with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

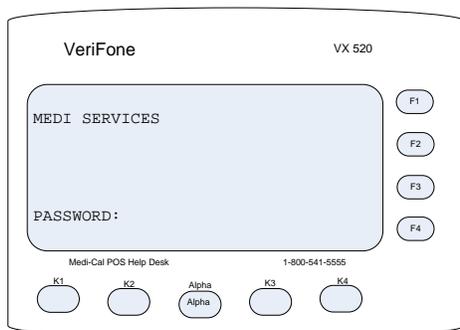


### 3.1 Medicaid Provider ID:

If you entered a shortcut key associated with a Medicaid Provider ID in the Shortcut Key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <K1> (PREV) key to go the NPI entry screen.

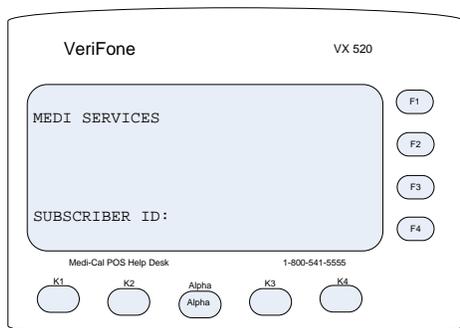
If this screen was validated and you would rather use an NPI value, leave the value in this screen as is. Press the <K1> (PREV) function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER> the value in this screen will be purged.



### 4. Password

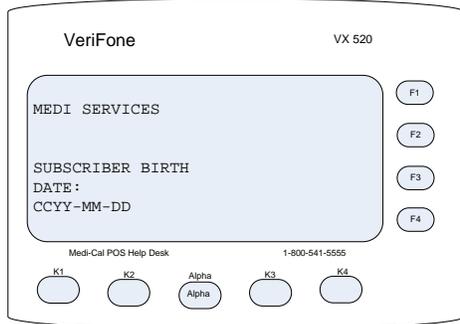
The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

Press the <K1> (PREV) key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <K1> (PREV) key displays the Medicaid Provider ID. If valid data was entered in the NPI field, pressing the <K1> (PREV) key displays the NPI.



### 5. Subscriber ID

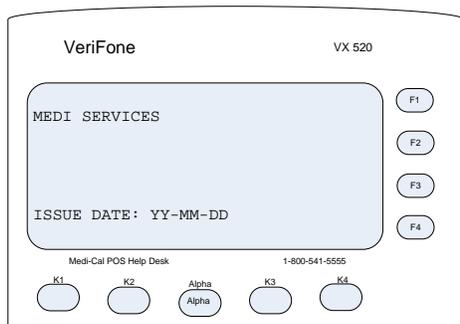
The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.



## 6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

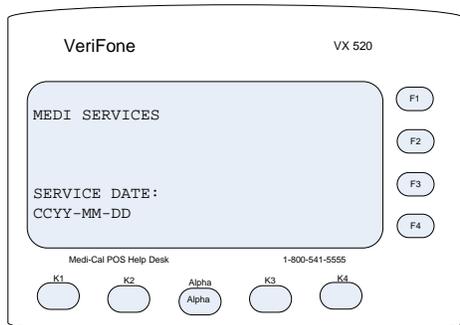
**Note:** If you are billing for services to a newborn infant using the mother's ID number, **you must type the mother's birth date in this screen**, not the infant's.



## 7. Issue Date

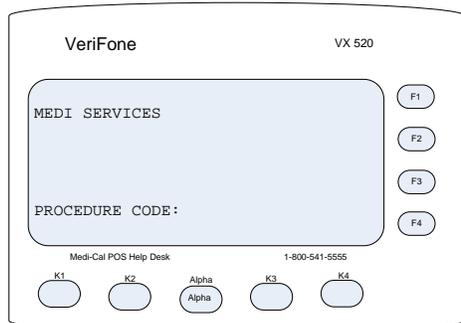
The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

**Note:** If the subscriber presents two BICs, advise the subscriber to destroy the card with the older issue date.



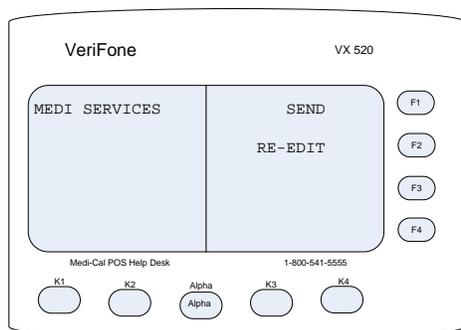
## 8. Service Date

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".



9. Procedure Code

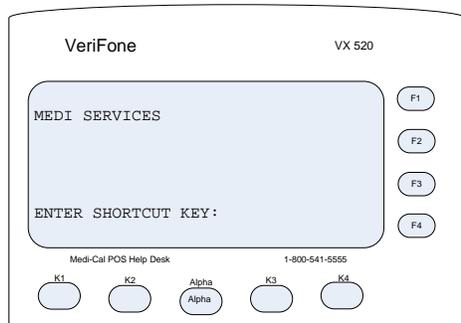
The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.



10. Send/Re-Edit Screen

After all Medi-Services screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

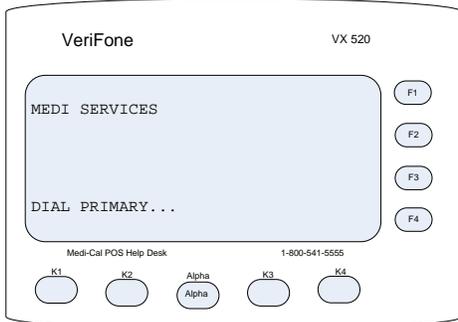
- Press <F1> (SEND) to submit your Medi-Services **request** to the Medi-Cal eligibility verification system. Continue at step 12.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 11.



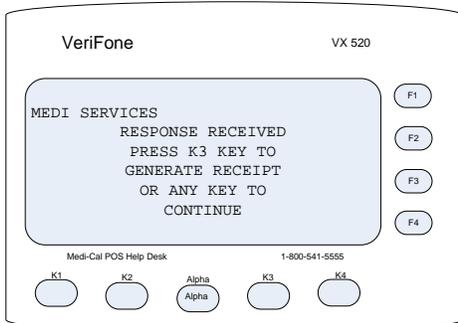
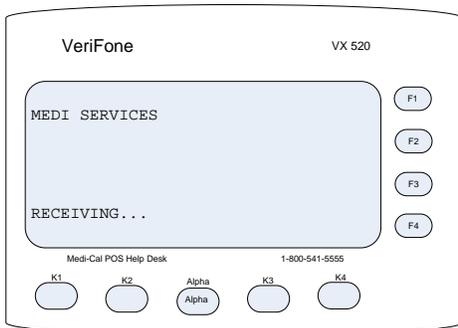
11. If you pressed <F2> (RE-EDIT) in step 10, the POS device will display the first screen of your Medi-Services **request**, the Shortcut Key screen. You can scroll through the screens by pressing the <K2> (NEXT) and <K1> (PREV) keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <K4> (EXIT) or by continuing to press <K2> (NEXT) or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.

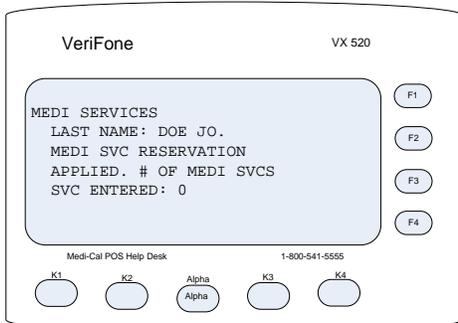


12. Several screens display, including the screens below, while the transaction is processing.

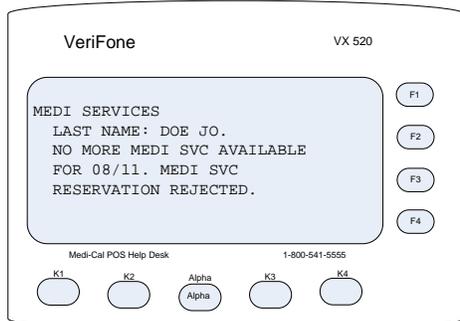


13. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

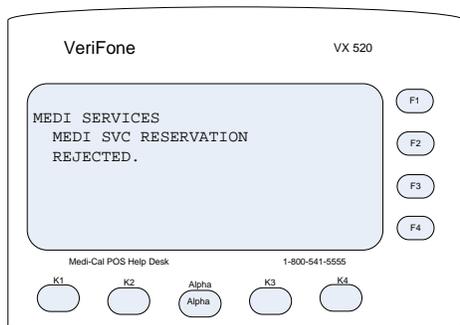
When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing the <K3> (PRINT) key on the keypad.



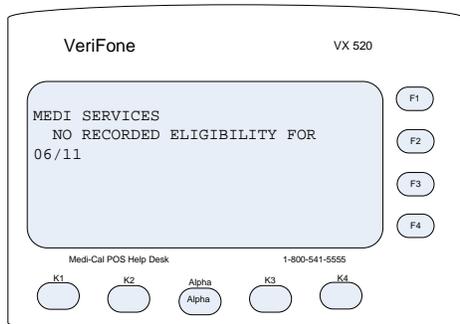
14. If the subscriber is eligible and has Medi-Services remaining, the POS device will display a response message indicating that the Medi-Services reservation was applied, as well as the number of Medi-Services remaining. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.



15. If the subscriber is eligible and does **not** have Medi-Services remaining, the POS device will display a response message indicating that the Medi-Services reservation was not applied and that no more Medi-Services are available. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen

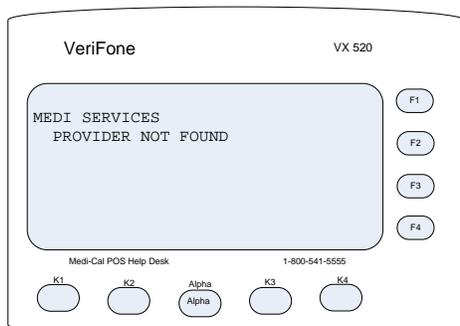


16. If the subscriber has a SOC that has not been cleared, the POS device will display a response message indicating that the Medi-Services reservation was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.



17. If the subscriber is **not** eligible, the POS device will display a "NO RECORDED ELIGIBILITY FOR (MONTH) (YEAR)" message. Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen.

**Note:** Providers need to verify that the information entered was correct before denying Medi-Cal services to the subscriber.

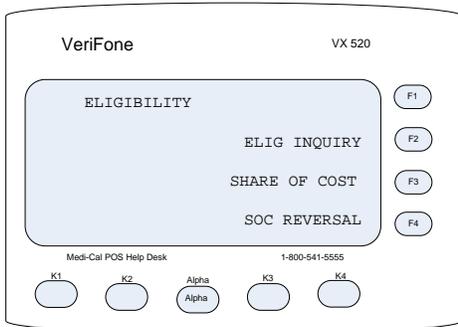


18. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

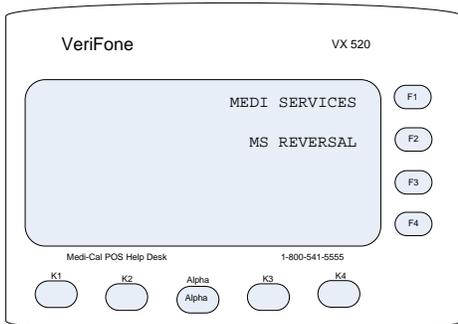
## Performing a Medi-Services Reversal Request

This section contains instructions for performing a Medi-Services (MS) Reversal Request using the POS device.



### 1. Eligibility Menu

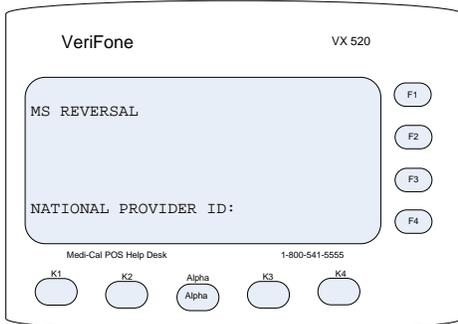
The Eligibility Menu screen displays after performing steps 1 and 2 of the “Beginning a Transaction” section. Press the <K2> (NEXT) key on the keypad. Select “MS REVERSAL” by pressing the corresponding function <F> key.



### 2. Shortcut Key

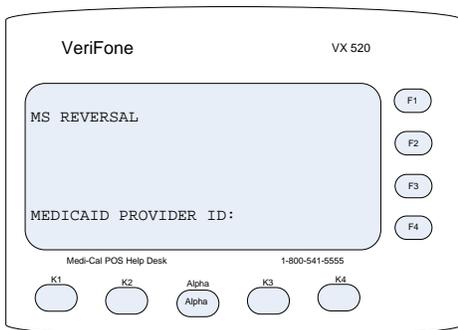
The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed

For more information about the shortcut key, refer to the [VX 520 Device System Transactions](#) section of this user guide.



### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your NPI. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise, with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

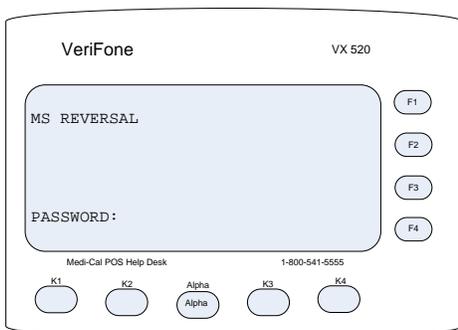


#### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the Shortcut Key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <K1> (PREV) key to go the NPI entry screen.

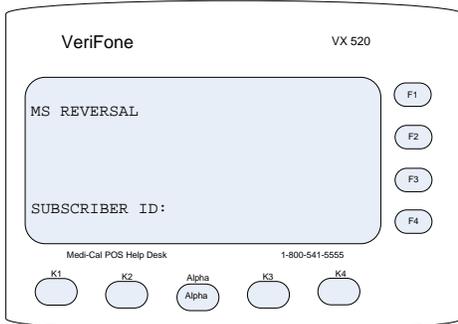
If this screen was validated and you would rather use an NPI value, leave the value in this screen as is. Press the <K1> (PREV) function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.



### 4. Password

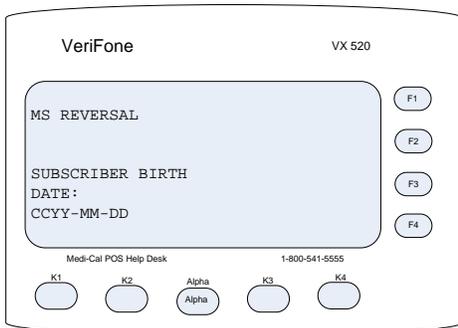
The POS device will prompt you to enter your password. Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

Press the <K1> (PREV) key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <K1> (PREV) key displays the Medicaid Provider ID. If valid data was entered in the NPI field, pressing the <K1> (PREV) key displays the NPI.



5. Subscriber ID

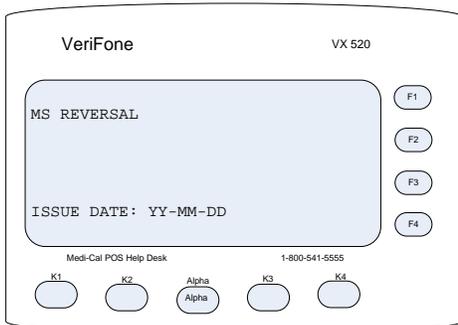
The POS device will prompt you to enter the subscriber ID number. If the screen already displays the subscriber ID number, press <ENTER> to accept the displayed value. Otherwise, type the subscriber ID number and press <ENTER>.



6. Subscriber Birth Date

The POS device will prompt you to enter the subscriber's birth date. If the screen already displays the birth date, press <ENTER> to accept the displayed value. Otherwise, type the subscriber's birth date in the format CCYYMMDD and press <ENTER>. For example, if the subscriber's birth date is September 29, 1970, type "19700929".

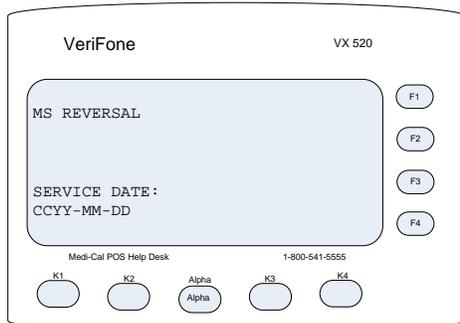
**Note:** If you are billing for services to a newborn infant using the mother's ID number, **you must type the mother's birth date in this screen**, not the infant's.



7. Issue Date

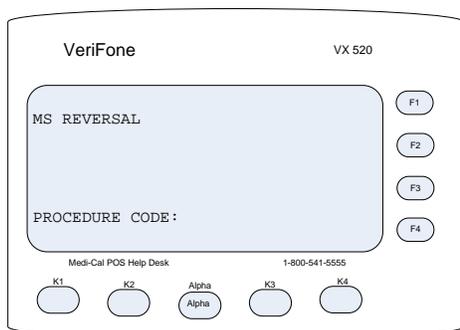
The POS device will prompt you to enter the issue date shown on the BIC or HAP card. If the screen already displays the issue date, press <ENTER> to accept the displayed value. Otherwise, type the issue date in the format YYMMDD and press <ENTER>. For example, if the issue date is August 26, 1998, type "980826".

**Note:** If the subscriber presents two BICs, advise the subscriber to destroy the card with the oldest issue date.



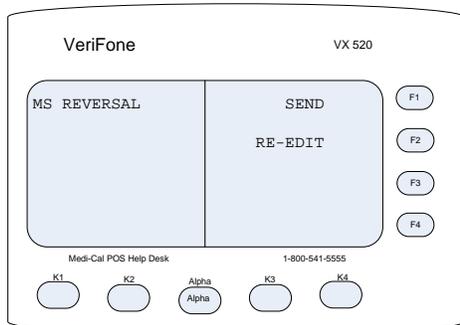
**8. Service Date**

The POS device will prompt you to enter the service date. The screen displays the current date by default. Press <ENTER> to accept the displayed value. Otherwise, type the service date in the format CCYYMMDD and press <ENTER>. For example, if the service date is December 2, 2003, type "20031202".



**9. Procedure Code**

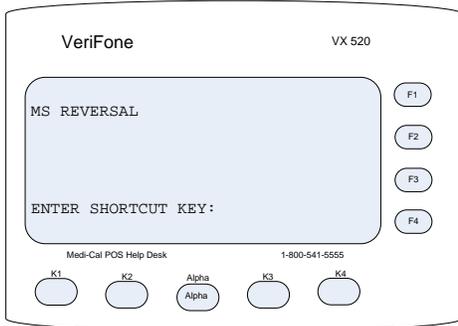
The POS device will prompt you to enter the procedure code. Type the HCPCS, CPT-4, UB-92, NDC, UPC or HRI code and press <ENTER>.



**10. Send/Re-Edit Screen**

After all MS Reversal screens have been completed, the Send/Re-Edit screen displays. Options are as follows:

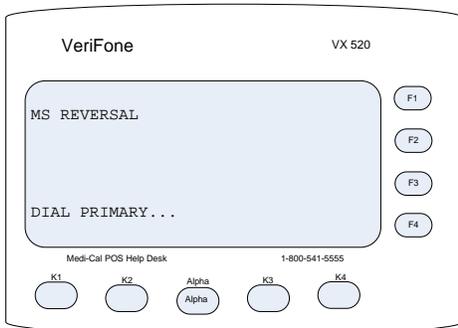
- Press <F1> (SEND) to submit your MS Reversal transaction to the Medi-Cal eligibility verification system. Continue at step 12.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 11.



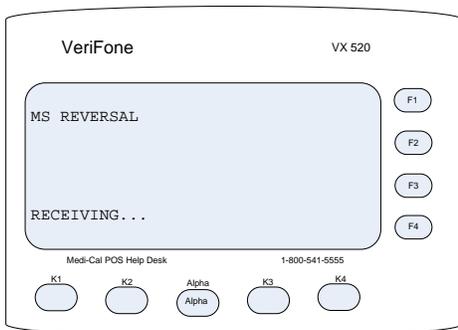
11. If you pressed <F2> (RE-EDIT) in step 10, the POS device will display the first screen of your MS Reversal transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <K2> (NEXT) and <K1> (PREV) keys.

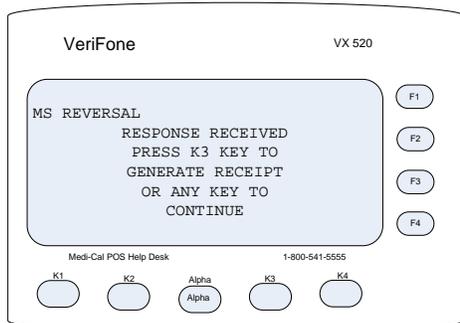
To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <K4> (EXIT) or by continuing to press <K2> (NEXT) or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction to the Medi-Cal eligibility verification system.



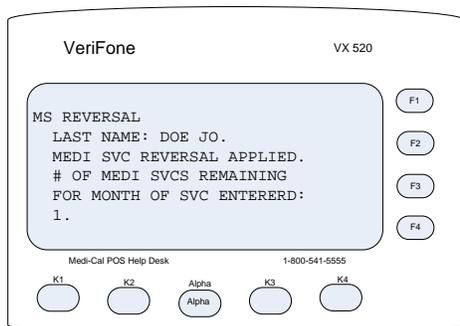
12. Several screens display, including the screens at left, while the transaction is processing.



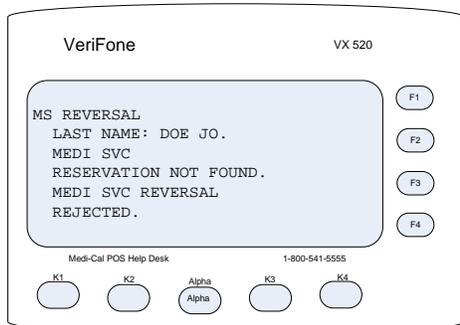


13. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal eligibility verification system.

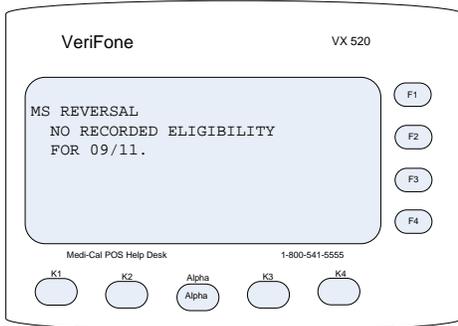
When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing the <K3> (PRINT) key on the keypad .



14. If the subscriber is eligible and has a Medi-Services reservation applied, the POS device will display a response message indicating that the Medi-Services reversal was applied, as well as the number of Medi-Services remaining. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.

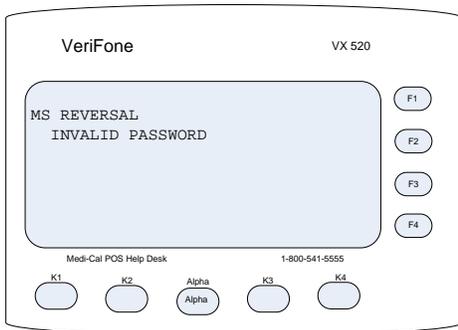


15. If the subscriber does **not** have a Medi-Services reservation applied, the POS device will display a response message indicating that the Medi-Services reversal was rejected. Press <ENTER> to scroll through the provider mail until you reach the end of the message. When you have finished reviewing your provider mail, press <CANCEL> once to return to the Eligibility Menu screen and perform another Eligibility transaction. Otherwise, press <CANCEL> two times to return to the Main Menu screen.



16. If the subscriber is **not** eligible, the POS device will display a “NO RECORDED ELIGIBILITY FOR (MONTH) (YEAR)” message. Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen.

**Note:** Providers need to verify that the information entered was correct before denying Medi-Cal services to the subscriber.



17. If the claim is rejected for an error that pertains to the provider information (such as provider ID or password), a screen will display indicating the error.

Press <ENTER> to scroll through the provider mail and return to the Send/Re-Edit screen, then press <F2> (RE-EDIT).

**Appendix: List of  
Approved Abbreviations**

This appendix lists the abbreviations (and their definitions) used by Medi-Cal in the 271 Eligibility Response transaction.

Amt	Amount
Assoc	Association
Auth	Authorization
CA	California
CCS	California Children's Services
Ctr	Center
Ctrs	Centers
Corp	Corporation
Cnty	County
CMSP	County Medical Services Program
Cov	Coverage
\$	Dollar/Dollars
Fed	Federal
FQHC	Federally Qualified Health Clinic
Fdn	Foundation
GHPP	Genetically Handicapped Persons Program
Grp	Group
Hlth	Health
HCP	Health Care Plan
HIC	Health Insurance Claim
HMO	Health Maintenance Organization
Hosp	Hospital
ID	Identification
Inc	Incorporated
Indep	Independent
IPA	Independent Physician Association
Ind	Indicator
I/P	Inpatient
LTC	Long Term Care
Med	Medical
Medi Svc	Medi-Services
#	Number
OHC	Other Health Coverage
O/P	Outpatient
PHP	Prepaid Health Plan
PCCM	Primary Care Case Management
PCP	Primary Care Physician/Provider
PHC	Primary Health Care
Pgm	Program
Prov	Provider
S.	Southern
Svc	Service
Svcs	Services
SMO	Staff Model Office
Syst	System
Systs	Systems
TPN	Total Parental Nutrition
TAR	Treatment Authorization Request
w/	With