

## Tribal Affairs PCCM Client Roster Quick Reference Sheet

## How to Retrieve Your PCCM Client Roster (HIPAA 834) in ProviderOne

- 1. Login to ProviderOne using one of the following profiles:
  - EXT Provider Download Files
  - EXT Provider Eligibility Checker
  - EXT Provider Eligibility Checker-Claims Submitter
  - EXT Provider Managed Care Only
  - EXT Provider System Administrator
  - EXT Provider Upload Files
  - EXT Provider Upload and Download Files
- 2. Click on View Enrollment Roster under Managed Care
- 3. Filter by (a) Organization (enter your organization number) and (b) File Effective Date (enter the first date of the month you are retrieving), then click Go

Welcome Longnecker, Mike . You have logged in with EXT Provider Upload and Download Files profile.			
? 📢	Path: Provider Portal/ 834 Transaction List		
Close			
834 Transaction List:			
Filter By : Organization 👻 your o	rg # And File Effective Date	✓ 08/01/2014 And A	ction Verify - And Quarter - Go
Transaction Set ID Transaction #	Payer ID Payer Name Health P	Action File Effective Date Report Start Date	Report End Date Member ID Maintenance Ty

- 4. Click on the Save to XLS button
- 5. ProviderOne will display a TXT version of the client roster (HIPAA 834) in Microsoft Excel. At this point, you can save it as an Excel file.