

ChocAn User Manual

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ChocAn

Program Overview

This program is designed for Providers, Managers, and Operators of the ChocAn system. The program uses dialog boxes for users to select choices or type in numbers.

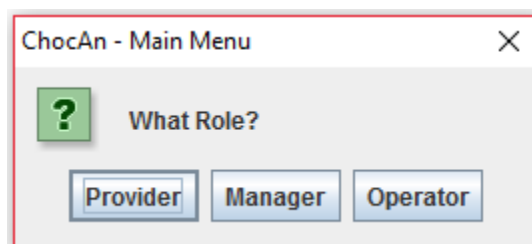
* If at any point you click the **exit** button in the top right or a **Cancel** button the program will stop.

* All Provider and Member numbers must be entered as a 9 digit number. All Service codes must be entered as a 6 digit number. Failure to do so will result in a warning box like below.



Main Menu

When the program starts you see the Main Menu

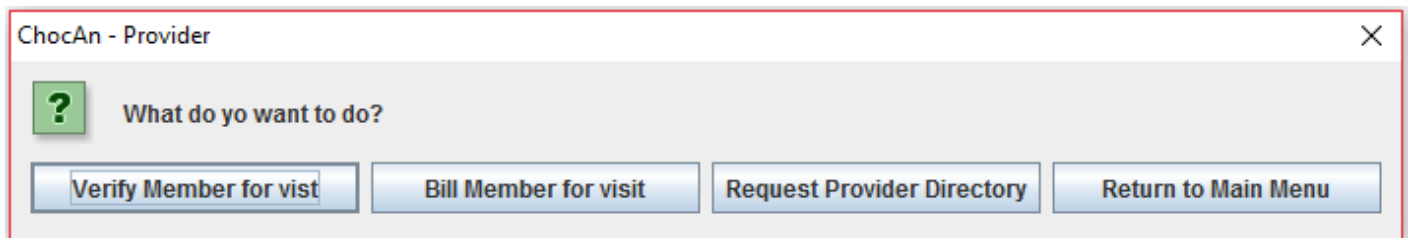


From there you can go into different roles, simply chose the role you wish to be in.

- The [Provider](#) role is for providers to verify members for a visit, bill a visit, or request the provider directory.
- The [Manager](#) role is for Managers to request Member, Provider, Summary, or EFT reports.
- The [Operator](#) role is for operators to manage Members, Providers, and the Provider Directory. When they manage they can add, remove, or update information for the item they are managing.

Provider Role

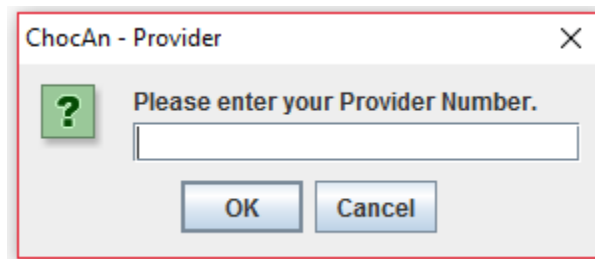
When you navigate to the Provider role from the Main Menu you will see

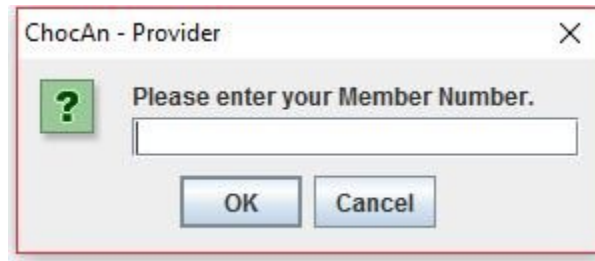


- Choose [Verify Member for visit](#) if you are about to provide a healthcare service for a ChocAn Member.
- Choose [Bill Member for visit](#) if you have provided the service and are ready to bill the Member.
- Choose [Request Provider Directory](#) if you need to look up a service name or code.
- Choose [Return to Main Menu](#) if you wish to return to the Main Menu where you can choose a different role.

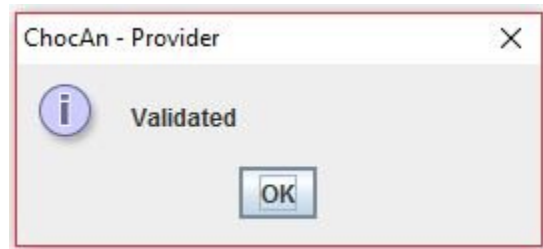
Verify Member for visit

The first 2 windows you see require you to put in a 9 digit ID number, first for the Provider, and then for the Member in screens like below.

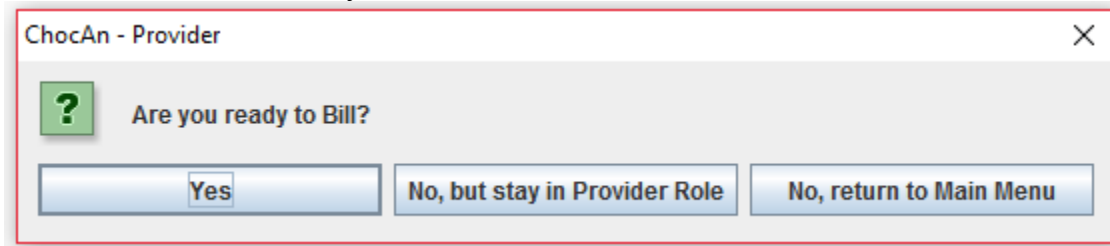




After you put in the Member number the system will look it up and show you the status of the Member, either: "Validated", "Invalid number", or "Member Suspended", click **OK**.



After the Member status is shown you will see this screen



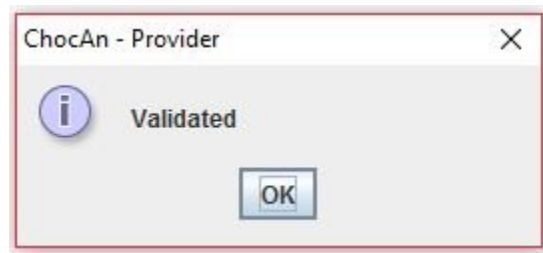
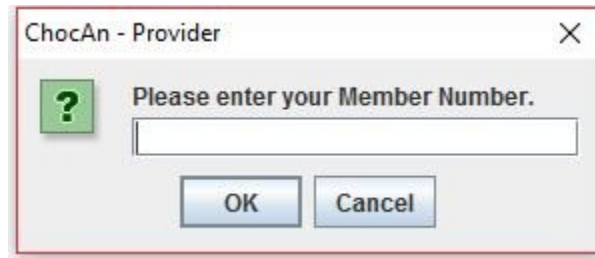
to bill the member.

- Choose **Yes** [Bill Member for visit](#)
- Choose **No, but stay in Provider Role** to return to the [Provider Menu](#)
- Choose **No, return to Main Menu** to return to the [Main Menu](#)

Bill Member for visit

If you just verified the member for the visit then you will not have to enter your Provider number but otherwise you will have to enter it in a box similar to Figure 5.

First you must enter the Member number in a window



In the next window you will input the date the service was provided like below

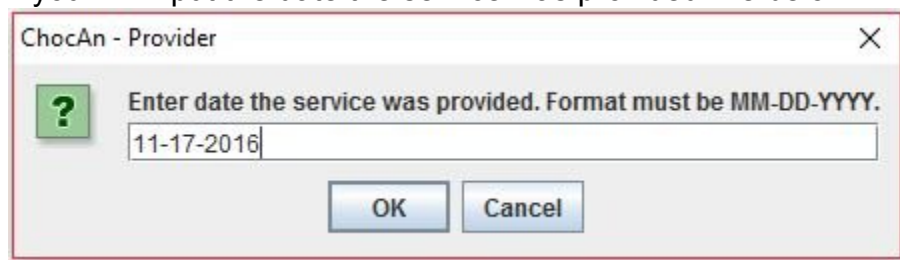
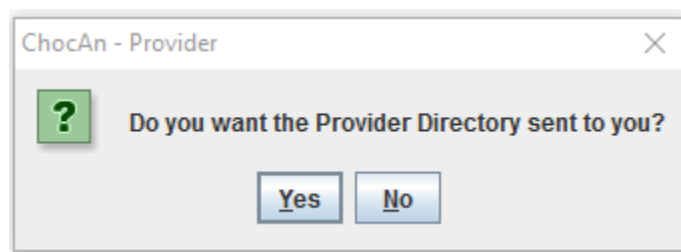


Figure 8

* It must be of the format MM-DD-YYYY or you will get an error message asking you to input it in the correct format.

It will ask you if you want the Provider Directory with a screen below

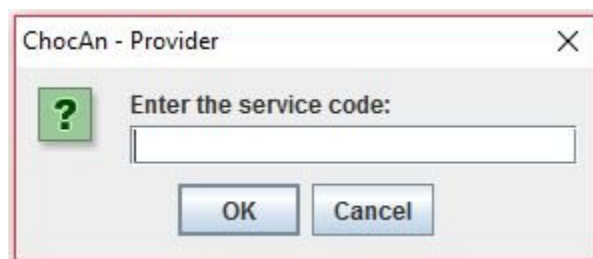


- Choose **Yes** and a message will appear

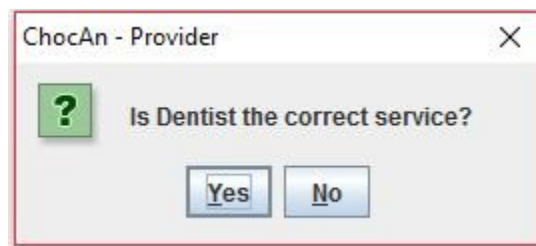


- Choose **No** and the program will continue.

Next you will enter the Service code



A window will appear asking you if it is the correct service similar to below

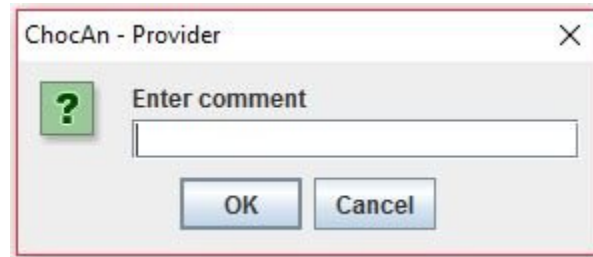


- Choose **Yes** and the program will continue.
- Choose **No** and you will be re prompted for the code and asked if it is correct until you say **Yes**.

Next it will ask if you wish to enter comments

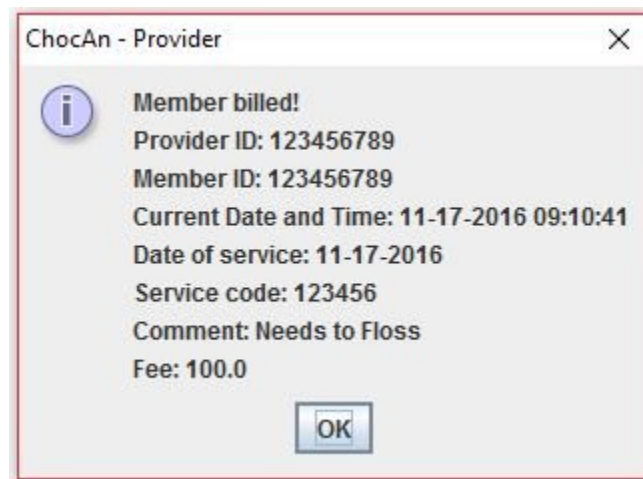


- Choose **Yes** and you will be given a place to enter comments

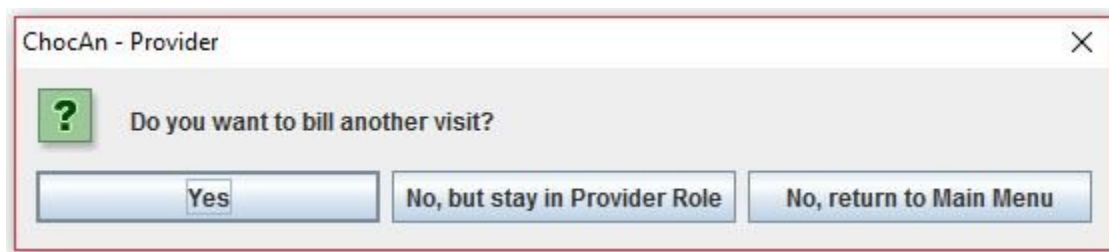


- Choose **No** and the program will continue

Next you will be given a summary of the visit, make sure you write down any appropriate information on your Provider form.



Finally you will be shown a screen to determine where to go



- Choose **Yes** to [bill another member](#)

- Choose **No, but stay in Provider Role** to return to [provider main menu](#)
- Choose **No, return to Main Menu** to return to the [Main Menu](#)

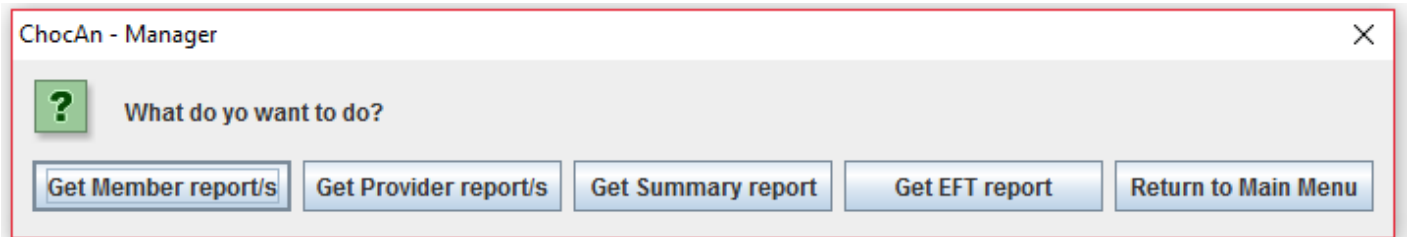
Request Provider Directory

A window will appear like below requiring you to click **OK**



Manager Role

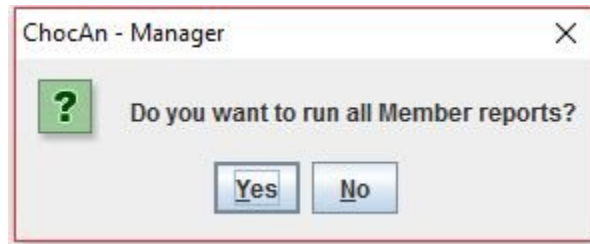
When you navigate to the Manager role from the Main Menu you will see the options below



- Choose [Get Member report/s](#) if you want to get Member report/s
- Choose [Get Provider report/s](#) if you want to get Provider report/s
- Choose [Get Summary report](#) if you want to get the Summary report
- Choose [Get EFT report](#) if you want to get the EFT report
- Choose [Return to Main Menu](#) if you wish to return to the Main Menu where you can choose a different role.

Get Member reports

You will be asked if you want to run all or just a single Member report



- Choose **Yes** to run all the member reports and you will see the message below then return to the [Manager Menu](#)

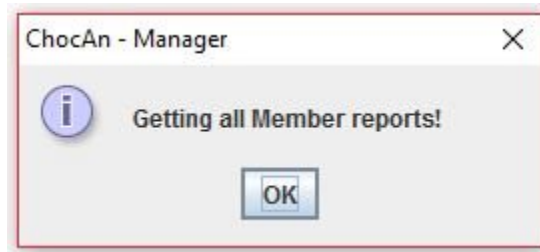
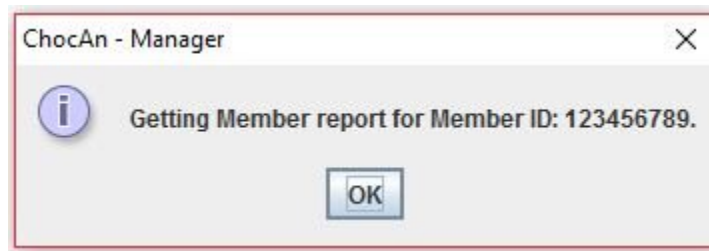
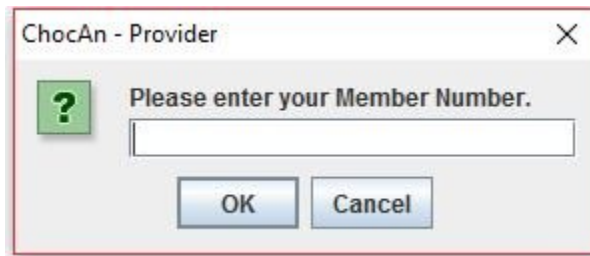


Figure 19

- Choose **No** to run a single member report and input the member number in the next screen



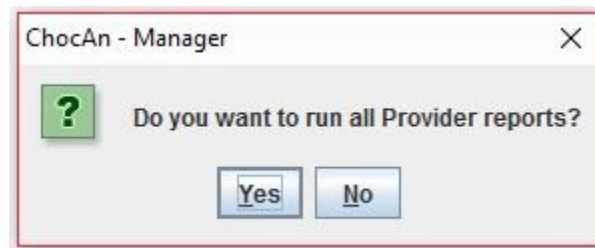
You will then be asked what you want to do next



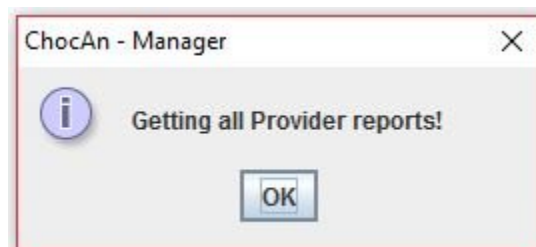
- Choose **Yes** to get more member reports
- Choose **No, but stay in Manager Role** to go to the [Manager menu](#)
- Choose **No, return to Main Menu** to return to the [Main Menu](#)

Get Provider reports

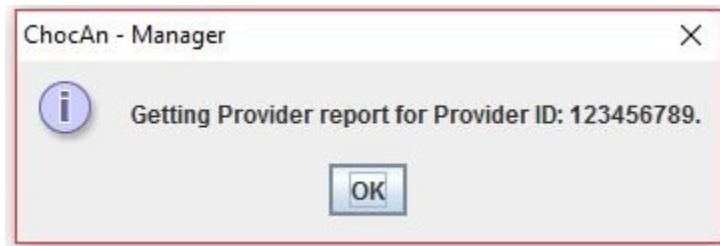
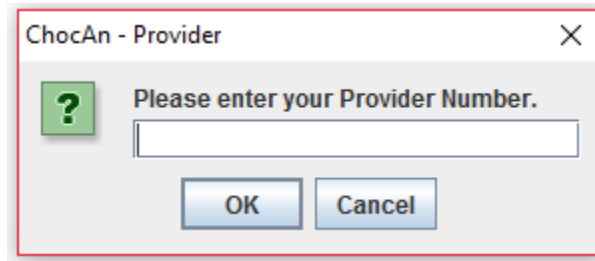
You will be asked if you want to run all or just a single Provider report



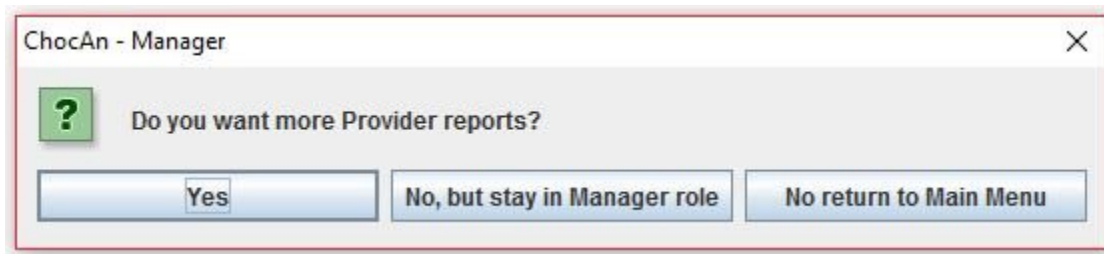
- Choose **Yes** to run all the provider reports and you will see the message below then return to the [Manager Menu](#)



- Choose **No** to run a single provider report and input the provider number in the next screen



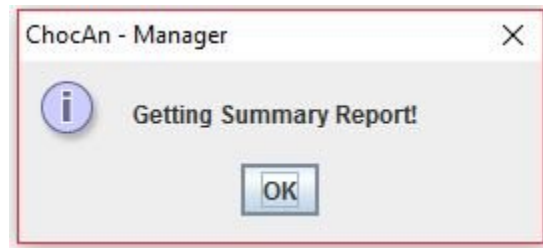
You will then be asked what you want to do next



- Choose **Yes** to get more provider reports
- Choose **No, but stay in Manager Role** to go to the [Manager menu](#)
- Choose **No, return to Main Menu** to return to the [Main Menu](#)

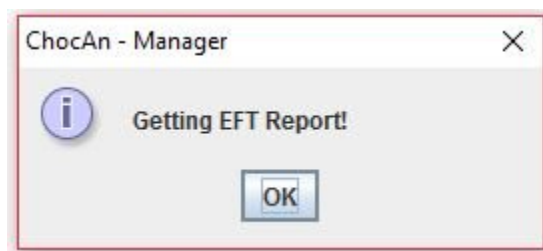
Get Summary report

You will see a window saying it has been sent then return to the [Manager Menu](#)



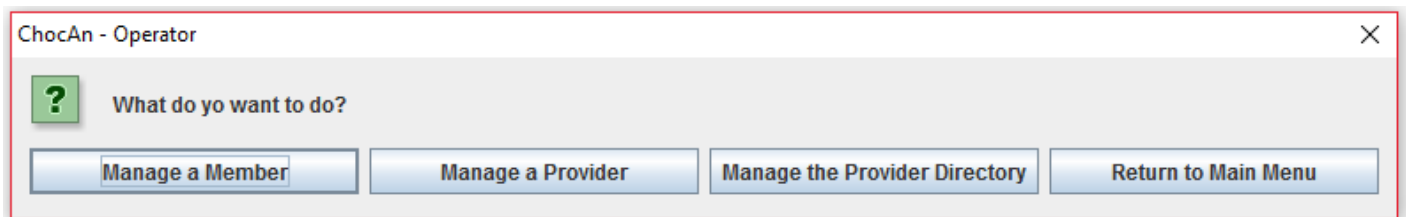
Get EFT report

You will see a window saying it has been sent then return to the [Manager Menu](#)



Operator Role

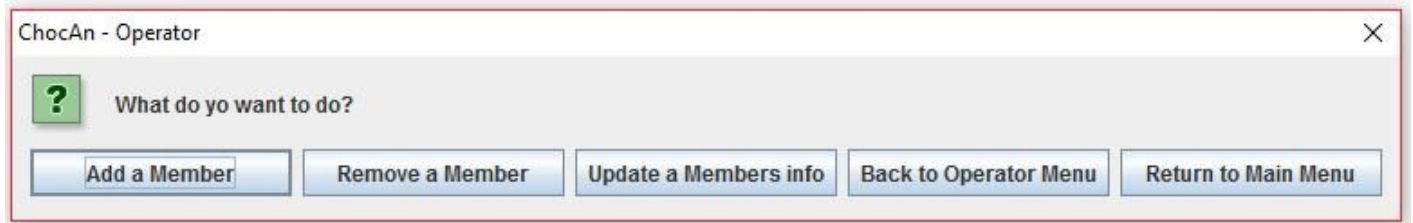
When you navigate to the Operator role from the Main Menu you will see the options below.



- Choose [Manage a Member](#) to add, remove, or update Members
- Choose [Manage a Provider](#) to add, remove, or update Providers
- Choose [Manage the Provider Directory](#) to add, remove, or update services
- Choose [Return to Main Menu](#) if you wish to return to the Main Menu where you can choose a different role

Manage a Member

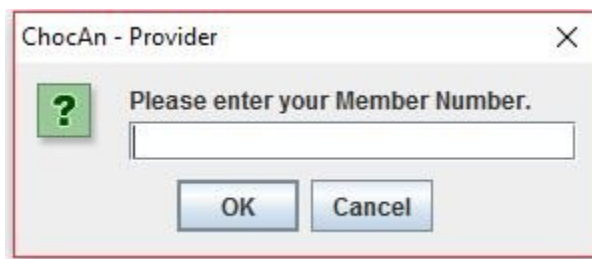
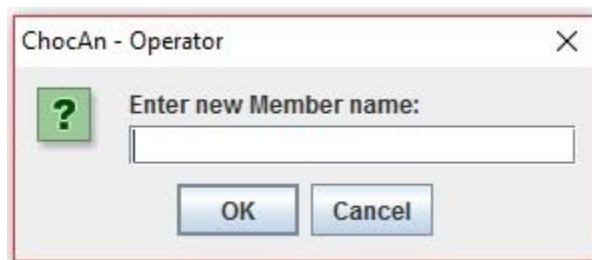
You will be asked what you want to do



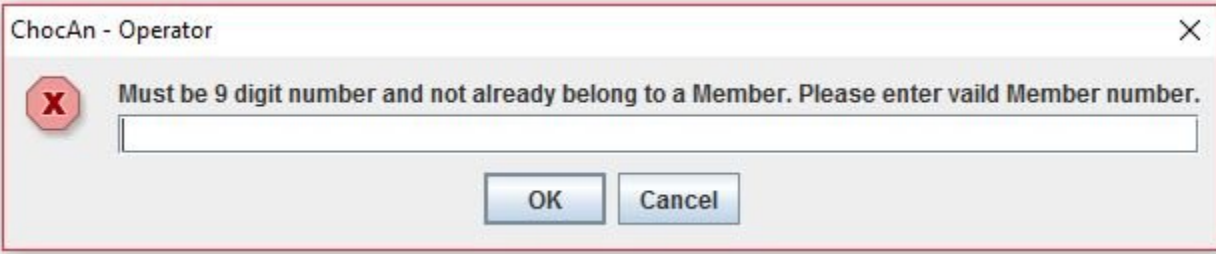
- Choose **Add a Member** to [add a Member](#)
- Choose **Remove a Member** to [remove a Member](#)
- Choose **Update a Member** to [update a Member](#)

Add a Member


You will be asked for a member name, number, address, city, state, and zip



If you don't put in a 9 digit number or the Member number already belongs to someone you will see the error below

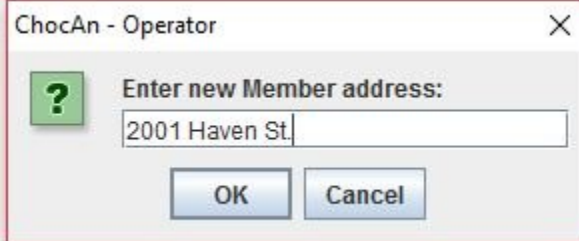


ChocAn - Operator


 Must be 9 digit number and not already belong to a Member. Please enter vaild Member number.

OK Cancel

Enter the Member address similarly as below

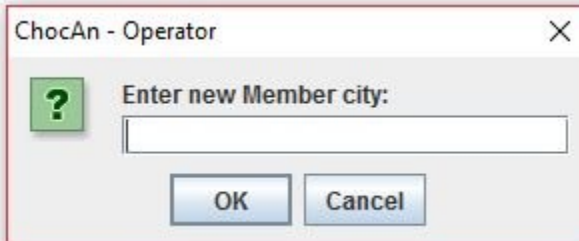


ChocAn - Operator


 Enter new Member address:

2001 Haven St.

OK Cancel

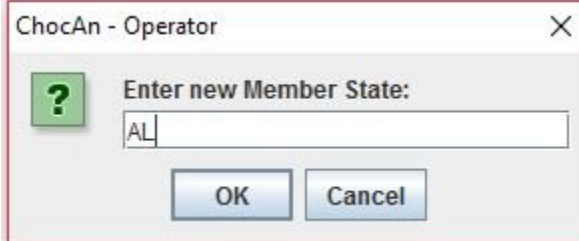


ChocAn - Operator


 Enter new Member city:

OK Cancel

Enter the state as a 2 letter code



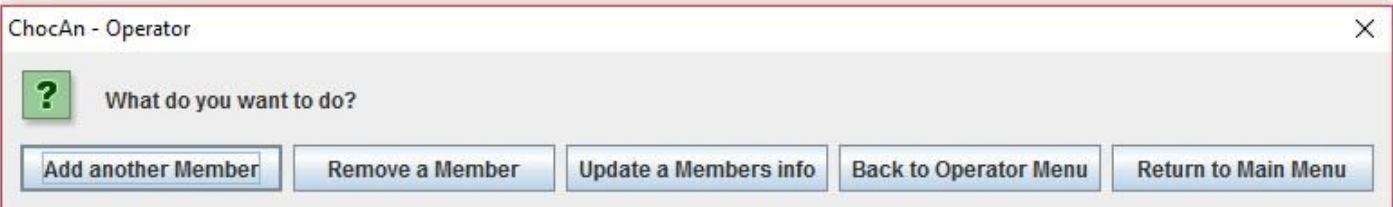
ChocAn - Operator

 Enter new Member State:


AL

OK Cancel

You will then be asked what you want to do next



ChocAn - Operator

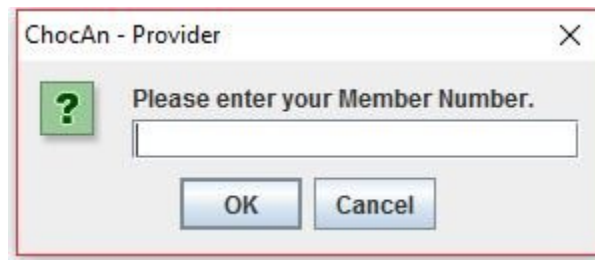
 What do you want to do?

Add another Member Remove a Member Update a Members info Back to Operator Menu Return to Main Menu

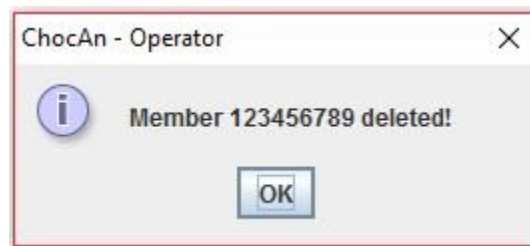
- Choose **Add another member** to [add a member](#)
- Choose **Remove a Member** to [remove a Member](#)
- Choose **Update a Members info** to [update a Member](#)
- Choose **Back to Operator Menu** to return to [Operator Role](#)
- Choose **Return to Main Menu** to return to [Main Menu](#)

Remove a Member

You will be asked for the Member number



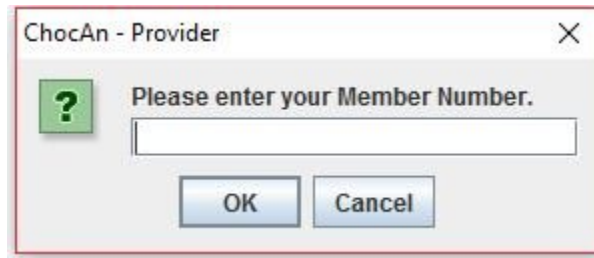
A message will pop up saying that the member number you entered was deleted



- Choose **Add a Member** to [add a member](#)
- Choose **Remove another Member** to [remove a Member](#)
- Choose **Update a Members info** to [update a Member](#)
- Choose **Back to Operator Menu** to return to [Operator Role](#)
- Choose **Return to Main Menu** to return to [Main Menu](#)

Update a Member

You will be asked for the Member number



You will be then be shown the information on the member you want to update. Just click on the part you want to update



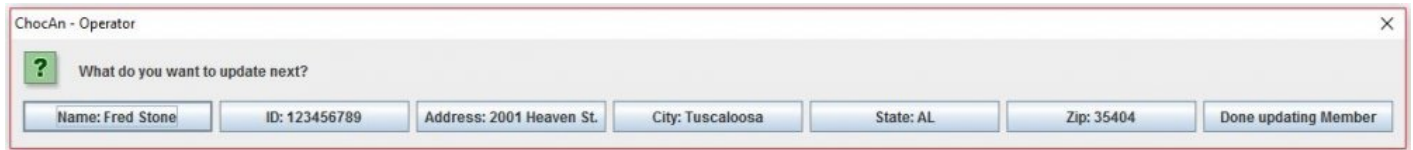
For example if you choose "Name" this screen will appear



Just type in the new name then this window will appear showing the old and the new name



You will then see a window with the option to update the Members info more or be done. The process for updating any other part of the Members info is the same as the name

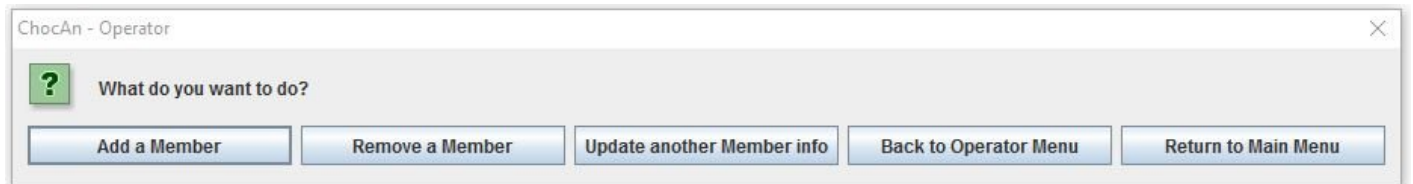


ChocAn - Operator

? What do you want to update next?

Name: Fred Stone ID: 123456789 Address: 2001 Heaven St. City: Tuscaloosa State: AL Zip: 35404 Done updating Member

If you choose **Done Updating Member** you will go to the screen below



ChocAn - Operator

? What do you want to do?

Add a Member Remove a Member Update another Member info Back to Operator Menu Return to Main Menu

- Choose **Add a Member** to [add a member](#)
- Choose **Remove a Member** to [remove a Member](#)
- Choose **Update another Members info** to [update a Member](#)
- Choose **Back to Operator Menu** to return to [Operator Role](#)
- Choose **Return to Main Menu** to return to [Main Menu](#)

Manage a Provider

It is just like [Manage a Member](#), the windows just have “Provider” instead of “Member” in the text

Mange the Provider Directory

Very similar to [Manage a Member](#).

The biggest difference is that for add and update you only have the Service name, number, and fee instead of Member name, number, address, city, state, and zip.