**New Monthly Recertification Mail Outs Process 5-2014**

This is only used until all the providers have done initial applications this process should end with the June 2015 mail outs.

**Letters & Definitions**

There are now 5 letters as follows:

* PCG Recertificaitons a simple recertification application is all that is due the app is online
* HC, RL, CMG & EM providers who have not recertified since 7/1/13 when the regs were changed are “INITIAL HC Recertifications” the app is online
* CM providers who have not recertified since 7/1/13 when the regs were changed are “INITIAL CM Recertifications” the app is online
* HC, RL, CMG & EM providers who HAVE recertified since the new regs are “PURE HC recertifications” and must have a hand crafted application packet sent with their letter
* CM providers who HAVE recertified since the new regs are “PURE CM recertifications” and must have a hand crafted application packet sent with their letter

**Report**

1. Pull the report [Medicaid\_Provider\_Certification\_Application\_and\_Expiration](https://reports.dhss.alaska.gov/Reports/Pages/Report.aspx?ItemPath=/DSDS/Providers/Medicaid_Provider_Certification_Application_and_Expiration&SelectedTabId=PropertiesTab&SelectedSubTabId=GenericPropertiesTab&ViewMode=Detail)
2. Use Shift and your arrow keys to select your data then insert a table
   1. Insert tab>Table>My table has headers and OK
   2. Delete any extra columns you do not need
3. Filter or delete the months and provider types not needed such as the habilitation homes or SME or ICFMR providers. Make note of any that are in your target month that are NOT enrolled yet.
4. To find the PURE Recertificaitons create a custom Conditional Format as follows (2007-2010 version of Excel)
   1. Select Medicaid Code Start Date
   2. Home Tab> Conditional Formatting>New Rule>Format only cells that contain>Cell Value Between 7/1/13 and 12/31/13 (or whatever the date range needs to be but starting with 7/1/13 always!)>Format>Fill and choose a color, hit OK twice and you will notice your list is partially ready.
5. Check that all your providers have a correctly formed mailing address. Adjust as needed both on the spreadsheet and in DS3.
6. Insert 3 Columns before DSDSID
   1. PCG
   2. CM
   3. HC
7. Alphabetize the list by provider name and skim the list for Individual Care Coordinators and place an X in the CM column
8. Look up the remaining providers to determine if they are a PCG or HCB provider
   1. Place an X next to the correct number for larger agencies so they get the right letters IE both a PCG and an HC letter if both are due the same month
   2. Add an abbreviated list of services for the HCB providers to make application packet assembly easier later i.e resp, reshb, RL, chor, cmg, EM etc
9. Custom Sort
   1. Home Tab>Sort & Filter
   2. Sort By CM>Cell Color>Pick color>On Top
   3. Then By HC>Cell Color>Pick color>On Top
   4. Then By CM>Values>A-Z
   5. Then By HC>Values>A-Z
   6. Then By PCG>Values>A-Z
   7. OK
   8. More A-Z sorts can be added in as needed

**Setting up the Merge Spreadsheet**

The spreadsheet used for the final merge is found in G:\Provider Certification & Compliance\Letter and Notice Templates\Source Spreadsheets\2014 (or by current year). The Spreadsheet is restarted quarterly to reduce the risk of corruption over time and to make navigation within the file manageable.

There are 8 sheets per month as follows (September is used as an example here because it was the first month this was done):

1. Sept All Providers (used to merge labels and to tell which pure recerts get what kind of application pieces.
2. Sept PCG 1st
3. Sept HC-RL-CMG-EM Pure 1st
4. Sept CM Pure 1st
5. Sept Initial HC-RL-CM-EM 1st
6. Sept Initial CM 1st
7. Sept 2nd Notice
8. Sept Final Notice

The merge heading fields are copied from the report and should be the same for all 5 recertifications as follows.

1. PCG
2. CM
3. HC
4. DSDSID
5. medicaid Code
6. Provider Name
7. Mailing
8. Mailing City, State, Zip
9. medicaid Code End Date
10. Delivery Due Date
11. Send Date

A note about dates and how Excel likes to “help”. Be careful about typing in dates in Excel as it reformats dates if you fill a series. When using a drag fill series be sure to click the little box at the end of the fill and tell it to copy the cells or you may end up with dates into the wrong decades! The easy way to avoid it is to simply add a couple spaces before typing the date of choice so that Excel stores the data as text and not a number. Be sure to change any 9/30/14 type dates to September 30, 2014 so that when the letters are merged they look professional.

The sent date is a reference for the staff so we know what the date was that a letter was sent out sometimes give or take a day or so depending on what might have happened such as illness or holiday weekends.

Other notes may be entered on to the spreadsheet such as which template was used during that month or what file each sheet is connected to for letters.

**Merging to the Letters**

Each of the above mentioned provider type has its own letter. Merge the sheet to each letter adding in appropriate merge fields as necessary. Merge fields in the letter should include:

1. Medicaid Code
2. Provider Name
3. Mailing
4. City, State, Zip
5. Medicaid Code End Date
6. Delivery Due Date

For the Pure Recerts actual application hard copies must be printed, assembled and sent to the provider until the applications are available online.

Save both the Word document and an Adobe PDF of each letter and the labels sheet. Split the Letter PDF by the provider’s name (use bookmarks) and file in their electronic folder under Communications.