CHAPTER 3: AN INTRODUCTION TO THE PBP

The **Data Entry** screen typically consists of the following components:

- **Title Bar -** Displays the PBP function **Data Entry**, the Section and Category Number, the Contract Number, the Plan number, and the Segment number.

- **Menu Bar -** Displays the list of functions that can be performed on the **Data Entry** window. Each of these functions may contain additional options that can be displayed by using the mouse or by using the function's shortcut key.

- **Data Entry Toolbar -** Provides the various **Data Entry** functions. The functions available are **Return to Management Screen**, **Return Without Validation**, **Previous Screen**, **Next Screen**, **Print Screen** and **Help**.

- **Navigation Bar** - Displays the screen labels and associated screen labels in a dropdown menu. Users can switch between screens by selecting the labels in the Navigation dropdown or by clicking on the <PREVIOUS SCREEN> and <NEXT SCREEN> toolbar buttons.

- **Data Entry Window -** Contains variables that belong to the selected screen or sub screen. On this screen, data entry can be performed for each variable.

BEGIN DATA ENTRY

Begin data entry by selecting a plan from **Step 2: Complete Section A** on the **PBP 2006 Management Screen** and clicking on <Enter Data>. After Section A has been completed, data entry can then be performed for Sections B, C, D, and Rx, if applicable. Section B consists of 20 separate Service Categories (B19 will **not** be available if Plan Type is HMO; and B20 is only available for Cost Plans NOT offering Medicare Part D).

Note:
All sections of the PBP are not applicable for certain plan types:
- PPO (Preferred Provider Organization), Local PPO and Regional PPO: Section C - OON is only available to PPO plan types.
- PDPs and MA-PDs: Section Rx is only available to plans offering Medicare Part D.

Data entry can be exited at any time by clicking on the FILE menu item and selecting the Return to Management Screen or Return Without Validation option or by clicking on the:

 <RETURN TO MANAGEMENT SCREEN> or

 <RETURN WITHOUT VALIDATION> toolbar buttons.

To continue data entry, use the Screen Navigation to select the preferred screen, or click on the

 <PREVIOUS SCREEN> and <NEXT SCREEN> toolbar buttons,

or press the <PAGE UP> and <PAGE DOWN> keys.

NOTE: All sections of the PBP are not applicable for certain plan types:

- PDPs (Part D Plans): PDP plan types complete only Section Rx.

RADIO BUTTONS (PICK ONE)

This variable type includes the options from which only one option can be chosen. Choose an item by selecting the radio button next to the desired item. To clear variables with radio buttons, right mouse click anywhere within the variable's frame and select the Clear Variable option.

If an option labeled as "Other, describe," "Sometimes, describe," or "Other, describe in Notes," is selected, any descriptions should be entered in the appropriate **Notes (Optional)** field. See the **Notes (Optional)** variable for a complete explanation.

CHECK BOXES (PICK ONE OR MORE)
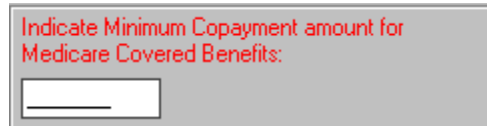
This variable type includes options from which one or more items can be chosen. Choose the item(s) by marking the check box next to the desired item. Note that if the first item on the list is "*None"*, it will clear all the other items.

If an option labeled as "Other, describe," "Sometimes, describe," or "Other, describe in Notes" is selected, any descriptions should be entered in the appropriate **Notes (Optional)** field. See the **Notes (Optional)** variable for a complete explanation.
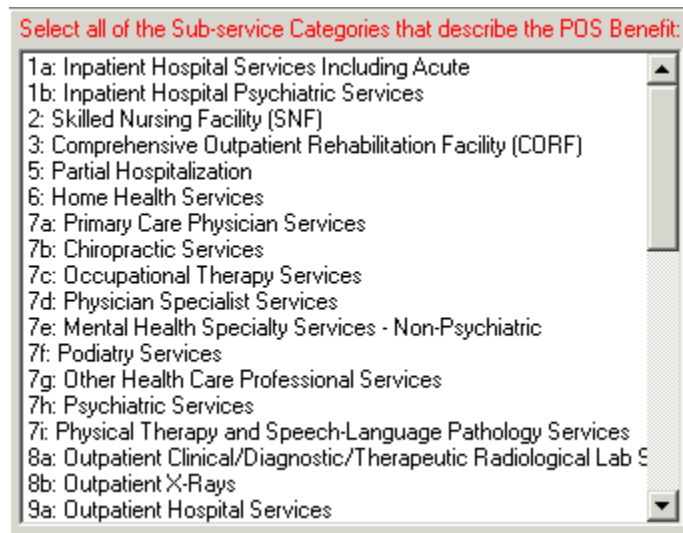
TEXTBOXES

This variable type can only contain numbers.

MULTIPLE SELECT LIST BOXES

This variable type includes options from which one or more items can be chosen from a list. To select more than one item when the items are listed consecutively, hold down the <SHIFT> key and select (highlight) the first desired item from the list and then select the last desired item from the list. This feature will highlight all the items between and including the first and last items selected from the list.

To select more than one item from the list when the items are not in consecutive order, hold down the <CTRL> (Control) key and select (highlight) the desired items from the list. The <SHIFT> and <CTRL> keys can also be used together when selecting items.

To de-select an item from the list, hold down the <CTRL> key and click on the highlighted item.

PRINT SCREEN

Selecting the Print Screen option from the FILE menu item or clicking on the <PRINT SCREEN> toolbar button allows the user to print the current screen to the default printer. If the screen does not print properly (possibly due to the default printer settings) there is another process available.

There are several steps to follow when capturing a screen in data entry for printing. To copy a screen, press the <ALT> + <PRINT SCRN> keyboard keys to capture only the active window. After opening a word processing package such as Word, or a graphics package such as Paint, paste the screen into the document by pressing the <CTRL> + <V> keys. The screen can also be copied into a document by using the paste function available in the application being used.

EXIT A SECTION OR CATEGORY WITH OR WITHOUT VALIDATION

The user has two Exit options available when leaving data entry: Return Without Validation and Return to Management Screen.

When the user exits without validation, the system will not validate any of the rules that pertain to that section or category. This feature allows the user to exit data entry quickly. For instance, if data entry has not been completed for a service category, the user may not want to validate the rules when exiting. By clicking on the <RETURN WITHOUT VALIDATION> toolbar button or selecting the Return Without Validation option from the FILE menu item, the validation rules are bypassed and the user is taken directly to the **PBP 2006 Management Screen**.

NOTE: Any time a section or service category is exited using the **Return Without Validation** feature, that section or service category will be marked as *Incomplete*. To mark a section or service category as *Completed*, the user must use the Return to Management Screen option.

When the user exits data entry using the Return to Management Screen option, the system will check all of the rules for that section or category. All rules must be satisfied before a section or service category can be marked as *Completed*. One such rule is the mandatory rule. All mandatory variables must contain valid data values. If a mandatory variable is left blank (data not entered), the user will be warned that this variable is mandatory (e.g., ERROR: Response required). The section or service category will be marked as *Incomplete* on the **PBP 2006 Management Screen** until all mandatory variables have been completed.

In addition to errors, any validation warnings will be displayed. Since these warnings are not errors (and are merely for informational purposes), they do not have to be resolved before a section or service category will be marked as *Completed* on the **PBP 2006 Management Screen**.

OPTIONAL SUPPLEMENTAL BENEFITS AND STEP-UPS

Section D enables the plan to create one or more Optional Supplemental Benefit packages with an associated premium and includes four data entry screens used to describe a plan's Optional Supplemental Benefits packages.

To add an Optional Supplemental Benefit package, click on the "Add" button beside the Navigation Bar dropdown menu from anywhere in Section D. In the "Specify Optional Supplemental Packages" screen that appears, the Benefits ID number will be automatically generated beginning with 001. Select the service category to be included in the Optional Supplemental Benefit package, and enter the description and the premium. Continue to click on the "Add" button until all desired Optional Supplemental Packages have been added.

To delete an Optional Supplemental Benefit Package, select the Package to be deleted and click on the "Delete" button beside the Navigation Bar dropdown menu. If a service category indicated by an asterisk is deselected with <CTRL-click>, the step-up screens will be deleted.

A special set of screens is provided for data entry of step-up benefits for nine selected subcategories: 7b-Chiropractic Services, 7f-Podiatry Services, 10b-Transportation, 16a-Preventive Dental, 16b-Comprehensive Dental, 17a-Eye Exams, 17b-Eye Wear, 18a-Hearing Exams, and 18b-Hearing Aids. These nine subcategories are indicated by an asterisk in the pick list on the Optional Supplemental Benefits screen. If a service category indicated by an asterisk is highlighted, the user can navigate to its step-up screens by clicking on the <Next Screen> toolbar button or by clicking on the screen label in the Navigation Bar dropdown. If a user selects any of the nine step-up benefits (indicated with an asterisk), the system will require that data be entered in the available step-up screens.

Specify the step-up benefit by highlighting one subcategory at a time from the Category column, enter the package description and premium amount. The step-up data entry screens are similar to and should be completed in the same manner as the Section B screens.

As an alternative, data previously entered in Section B for the subcategory can be copied to the step-up benefit subcategory screens by selecting the "Step Up – Copy from Section B" menu item under Opt Sup Packages. To use the copy menu item, the user must be on a step-up screen. However, the step-up data entry will have an "Incomplete" status until the step-up modifications are entered in the step-up benefit subcategory screens.

NOTE: If a plan's optional benefits package includes a step-up benefit for which there are no special step-up screens in Section D (not one of the nine indicated with an asterisk on the pick list), these step-up benefits must be described in the corresponding Notes field of the service category in Section B.

RED/BLUE COLOR SCHEME

Variable titles are displayed on the screen in either red or blue. Red variables are used to develop the Summary of Benefits sentences for *www.medicare.gov*; the remainder of the PBP variables are blue. The user is required to answer both the red and blue questions throughout the PBP in order to successfully upload.

MANDATORY/OPTIONAL FIELDS

All variables that are enabled (data entry can be performed) must be completed whether they are red or blue. The only exception is enabled variables that contain the word Optional in parentheses. These variables do not require data entry and can be left blank. However, there are several options that, if selected during data entry, require the user to add text to the **Notes (Optional)** variable. By Section these include:

    Section A: No, describe, and Yes, describe
    Section B: Sometimes, describe, and Other, describe
    Section C: Other, describe
    Section D: Other, describe

If any of these options are selected during data entry, the user must also enter text in the appropriate **Notes (Optional)** variable. Examples of variables that may contain these options include Select Periodicity, Select Coverage Basis, and Authorization.

<u>**NOTES**</u>

The variable type **Notes (Optional)** accepts up to 4,000 characters in any alphanumeric combination. The data can be entered directly into the text box or imported from a text file by using the <IMPORT TEXT> button.

At least one **Notes (Optional)** field is available for each section and service category; Section C contains multiple **Notes (Optional)** fields.

<u>**Entering Data in a Notes Field**</u>
Answering "Other" or Pick List Item is not applicable to the benefit package. If an MA PLAN believes that "Other" is applicable for describing a benefit, or the pick list item does not fully agree with the benefit that is being offered by the plan, then the MA PLAN should use the **Notes** field to further describe the benefit. Use of the **Notes** field is optional. If the MA PLAN believes that the pick list item is sufficient to describe the benefit, no further explanation is needed.

Formatting Information in the Notes Field. Notes fields are limited to 4,000 characters. When entering information into the **Notes** field, an MA PLAN MUST format the Note with the following references: Section – Screen – Question – and then provide the information. This approach will allow quick review of the information by CMS auditors (ACR) and regional office staff (marketing reviewers). Here is an example:

Section B Notes Field
Section B – 2-SNF – Screen 1 – Select Enhanced Benefit. We offer custodial services (non-Medicare-covered services). We call our custodial benefit the Vacation Assistance Program. It allows a spouse to admit an ailing spouse to a SNF for 3 days.

Importing Text
Importing text into a notes field in the PBP from a document such as Microsoft Word can be accomplished two ways. The user may select the text from another document, copy, and then paste the selected text into the PBP Notes field by pressing the <Ctrl> and <v> keys simultaneously. Alternatively, the user may save the document to be put into the

PBP as a text file and then use the Import Text button in the PBP to import this text file into the PBP Notes field.

Transferring Text from a Word Processing Document. In some cases, a user may want to transfer the contents of a word processing document into a Notes field. There are two techniques for accomplishing this.

NOTE: The following instructions are applicable for Microsoft Word but the instructions for other word processing software should be similar.

Technique #1: The contents of the document can be copied and then pasted into the Notes field. To do this, highlight the contents of the document and then click on Copy from the Edit menu group. Then in the PBP software, make sure the cursor is in the Notes field. Now simultaneously press the <CTRL> and <V> keys on the keyboard.

Technique #2: Save the document as a text file. In order to do this, click on Save As…from the File menu group and select the "Text Only (*.txt)" file type. Name the document and click on the Save button. Then in the PBP software, click on the Import Text button on the Notes field. In the file selection window, navigate to and select the text file saved above and then click on the Open button.

After the contents of the document have been transferred to the PBP Notes field, verify the text in the Notes field. Pay special attention to making sure the entire contents were transferred and not truncated.

VIEWING REPORTS

Data Report

The Data Report displays the data that have been entered for a Section(s) or Service Category(ies).

STEP 1: ACCESS THE REPORTS FUNCTION

From the **PBP 2006 Management Screen**, access the **Reports** function from the ACTIONS menu and select **Data Report** from the **Reports** drop-down menu or click on in the toolbar.

STEP 2: SELECT A CONTRACT NUMBER

On the Data Report screen, select a Contract Number by clicking to highlight.

STEP 3: SELECT PLAN(S), SECTIONS AND SERVICE CATEGORIES

Select one or more plans (click to highlight) to include in the report. Select at least one Section to be included in the report (**NOTE:** If Section B is selected, one or more service category(s) must also be selected). Including Section Notes is optional.

NOTE: It is **not** advisable to select <u>all </u>of the plans, sections, or service categories at once because of the amount of time it takes to produce the reports.

STEP 4: SELECT OUTPUT OPTION

Select an output option: *To Screen*, *To File*, or *To Printer*. When producing a report, only the variables that contain data will be displayed.

Produce Report To Screen: PBP will generate the report and display it on the screen.
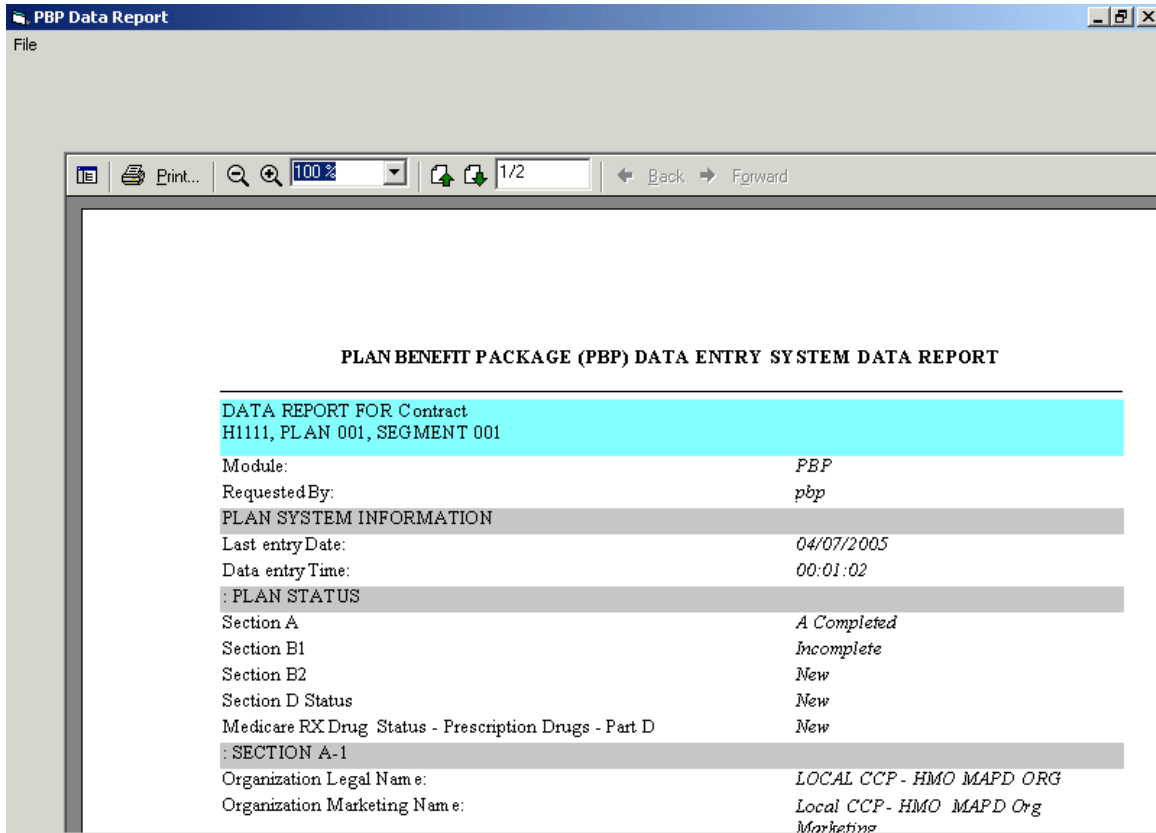
While the Data Report is displayed, the user can **Print** or **Export** by clicking on the toolbar buttons. Selecting the Print option will send a copy of the report to the printer. Selecting the Export option will save a copy of the report in a format type of the user's choice from the list of available options.

Exit the report by clicking <X> in the upper right corner.

Produce Report to File: PBP will generate the report and save it as a file.

PBP generates the report and confirms with the message "Data Report(s) has been saved to the following file(s) on C:\Directory Name\H1111001.TXT". The report will **not** be displayed on the screen.

When producing a report to file, the report is saved in ASCII format. The ASCII format does not include page breaks, lines, fonts, etc. The data report is saved without any formatting.

Produce Report to Printer: PBP will generate the report and send it to the printer. The report will **not** be displayed on the screen.

Summary of Benefits Report
The Summary of Benefits Report will produce the English sentences generated by the variables that are displayed in red on the data entry screens. These sentences are

produced for review by the plan prior to submission of the PLAN BID package to HPMS and will be displayed on *www.medicare.gov*.

STEP 1: SELECT A CONTRACT NUMBER , PLAN AND SEGMENT

Select a Contract Number, Plan, and Segment from the **PBP 2006 Management Screen** before accessing the Reports function.

STEP 2: ACCESS THE REPORTS FUNCTION

Select **Summary of Benefits Report** from the **Reports** drop-down menu or click on the toolbar button to access the Summary of Benefits Category Selection screen.
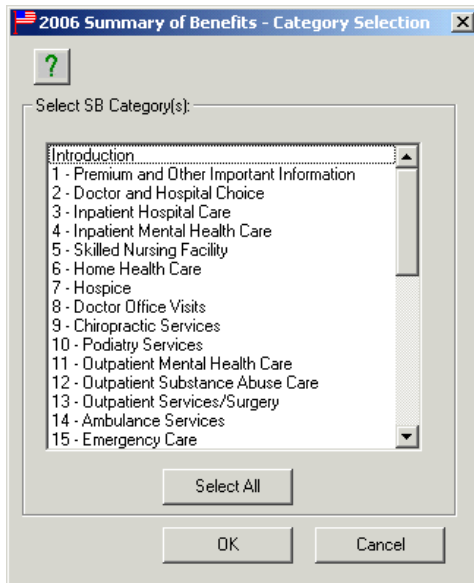
Select one or more categories from the list and click on <OK>. To produce a Summary of Benefits Report that includes all categories, click on <Select All> and click on <OK>.

STEP 3: VIEW INTRODUCTION TO SUMMARY OF BENEFITS

To view the Introduction to Summary of Benefits Report, select <Introduction> from the Summary of Benefits Category Selection screen.
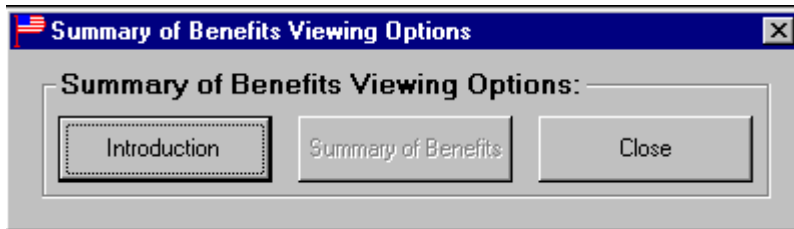
Click on <Introduction> on the Summary of Benefits Viewing Options screen.
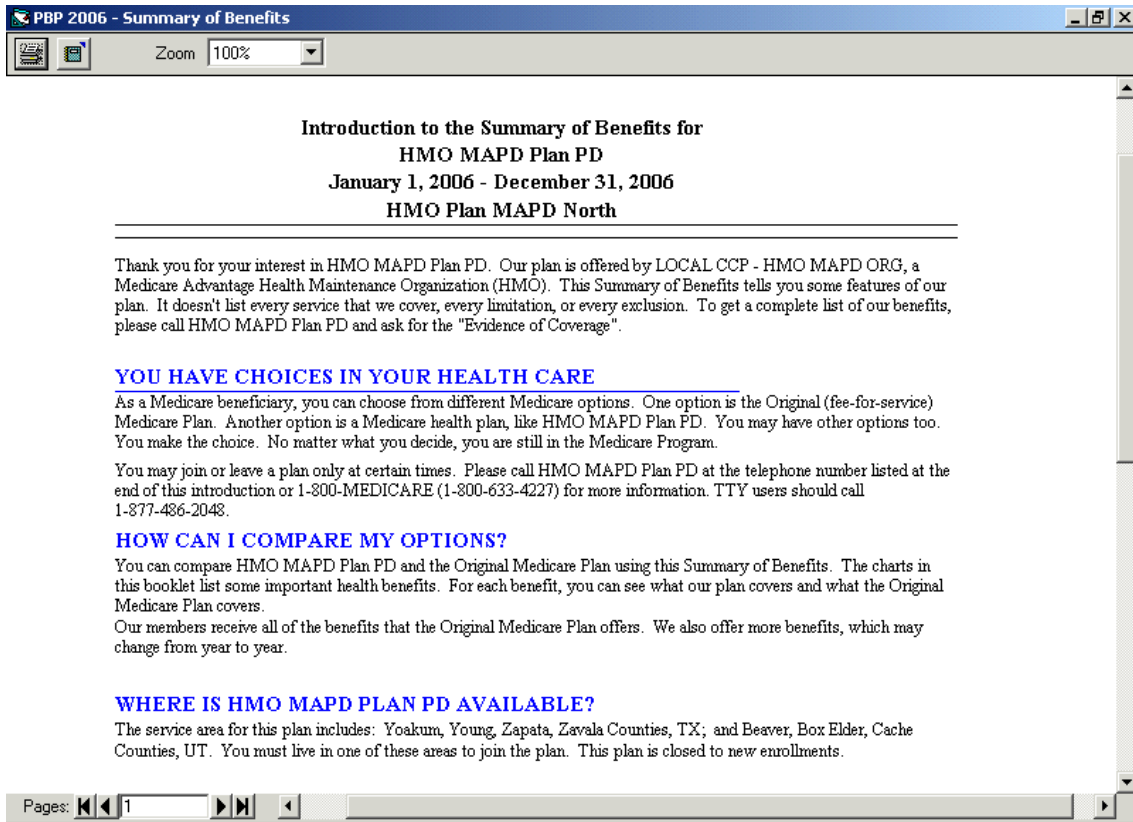
While the Introduction to the Summary of Benefits Report is displayed, the user can **Print** or **Export** by clicking on the toolbar buttons. Selecting the Print option will send a copy of the report to the printer. Selecting the Export option will save a copy of the report in a format type of the user's choice from the list of available options.

Exit the report by clicking <X> in the upper right corner.

STEP 4: VIEW SUMMARY OF BENEFITS REPORT
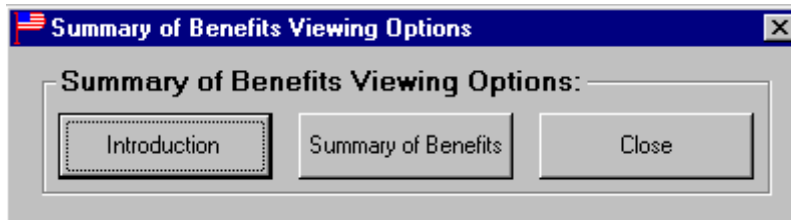
Click on <Summary of Benefits> to view the SB Report.

SUMMARY OF BENEFITS
FOR CONTRACT H1111, PLAN 001, SEGMENT 1

If you have any questions about this plan's benefits or costs, please contact Local CCP - HMO MAPD Org
Marketing.

Benefit Category	Original Medicare	HMO MAPD Plan PD
IMPORTANT INFORMATION		
1 - Premium and Other Important Information	You pay the Medicare Part B premium of $78.20 each month. (This is the 2005 amount and may change January 1, 2006.)	There is no additional premium beyond the Medicare Part B premium of $78.20 each month for your plan benefits and your Medicare Part D prescription drug benefits. (This is the 2005 amount and may change January 1, 2006.)
2 - Doctor and Hospital Choice

(For more information, see Emergency - #15 and Urgently Needed Care - #16.) | You may go to any doctor, specialist or hospital that accepts Medicare. | You must go to network doctors, specialists, and hospitals. |

(1) Each year, you pay a total of one $110 deductible.
(2) If a doctor or supplier chooses not to accept assignment, their costs are often higher, which means you may pay more.
(3) A benefit period begins the day you go to a hospital or skilled nursing facility. The benefit period ends when you have
not received hospital or skilled nursing care for 60 days in a row. If you go into the hospital after one benefit period has
ended, a new benefit period begins. You must pay the inpatient hospital deductible for each benefit period. There is no
limit to the number of benefit periods you can have.
(4) Lifetime reserve days can only be used once.
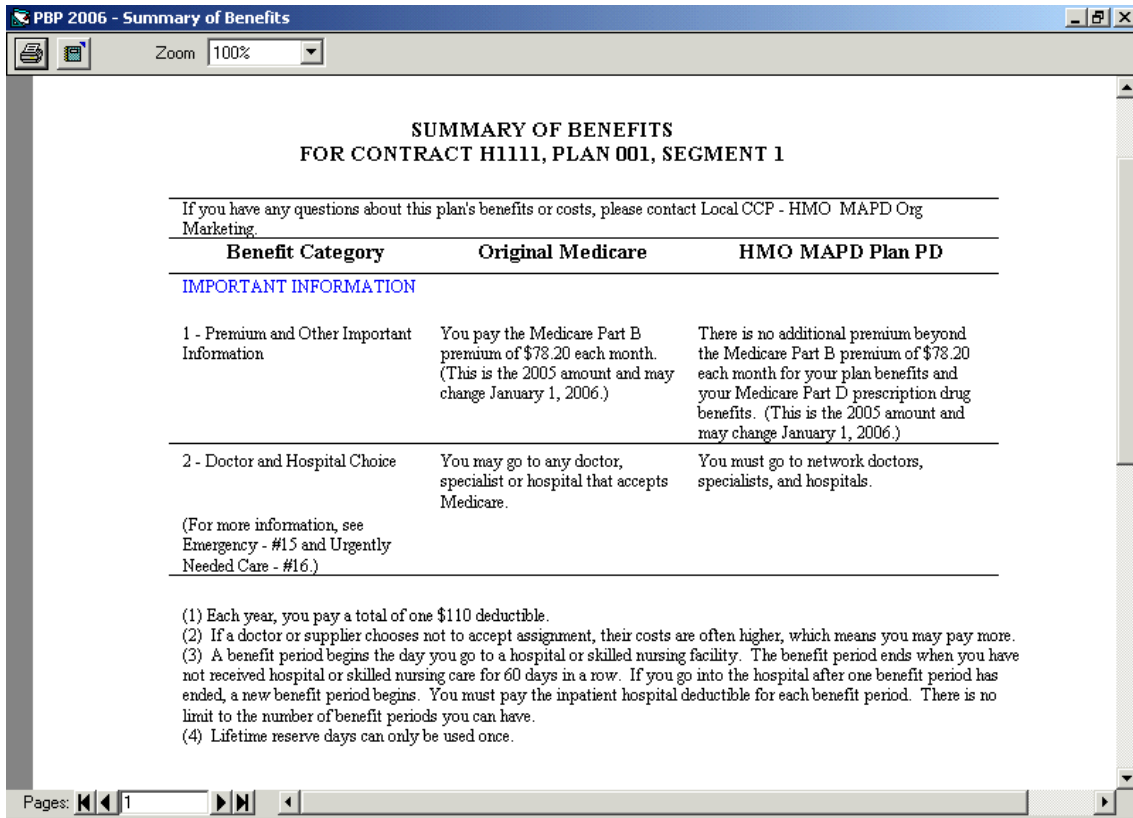
While the Summary of Benefits Report is displayed, the user can **Print** or **Export** by clicking on the toolbar buttons. Selecting the Print option will send a copy of the report to the printer. Selecting the Export option will save a copy of the report in a format type of the user's choice from the list of available options. (**NOTE:** If the HTML type is selected, the user should use the **Convert SB HTML into Delimited** option from the ACTIONS/Reports menu on the **PBP 2006 Management Screen** to reformat the file prior to opening in Word.)

Exit the report by clicking <X> in the upper right corner.

CONVERT THE SB HTML INTO A DELIMITED FILE

After creating a Summary of Benefits (SB) HTML file, this function can be used to convert the file into a delimited file. The delimited file simplifies the task of converting the SB report into a professional format. To create the SB HTML file, follow the instructions under the *View Reports* section for creating the SB report and exporting to a file in HTML format.

Complete the following steps to convert the SB HTML into a delimited file:

> **Step 1:** From the ACTIONS/Reports menu select the **Convert SB HTML into Delimited** option, or access by clicking on the Reports toolbar button.

Step 2: Enter the name of the HTML file in the space provided. Be sure to specify the full path and filename (e.g., C:\PROGRAM FILES\PBP2006\9999001.HTM). Alternatively, use the browse button to locate.

Step 3: Click on <Convert>.

Step 4: PBP will prompt when the conversion has been completed and provide the new filename. Please note the newly converted filename will now have an extension of *csv*.

Once the delimited file has been created, it can easily be opened in Microsoft Word and converted into a table format by completing the following steps:

Step 1: Open the new file using Microsoft Word.

Step 2: If prompted what type to "Convert File From:", select the "Text Only" option.

Step 3: Highlight all of the text, except for the title at the top and the footnotes at the bottom.

Step 4: From the Table menu on the toolbar, choose the *Convert Text to Table...* option.

Step 5: Under the "Separate text at" section, select the option "Other:". Then enter the exclamation mark "!" in the available box.

Step 6: Under the "Table size" section, make sure "3" is entered for the number of columns. Click on <OK>.

Step 7: Finish the document by making all other necessary formatting changes.

NOTE: This function and the instructions above are only intended for use with the Summary of Benefits section of the SB Report. They are not intended for the Introduction section of the SB Report or for the Data Report.

UPDATE PLAN INFORMATION IN HPMS

The **Update** function is a process by which contract and plan information are updated on the HPMS and downloaded to the client. Before starting this process, be sure that the connection to MDCN has been established.

NOTE: Users who do not have MDCN access on the PC where PBP is running should do the following to update their plan information:

1) Exit PBP;
2) On the Bid 2006 Start Page on HPMS, use the "Download Plan-Specific Information" function to download a plan update file to your PBP application directory; and
3) Run PBP and the software should automatically discover the plan update file and update the PBP plan information.

STEP 1: SET INTERNET EXPLORER AS DEFAULT BROWSER

Before beginning the **Update** function, a user must have the computer's default browser set to Internet Explorer. The instructions for setting Internet Explorer as the default browser are as follows:

- Run Internet Explorer
- Under the TOOLS menu item, select **Internet Options**
- On the Programs tab, make sure the following option is checked: Internet Explorer should check to see whether it is the default browser
- Close Internet Explorer
- Run Internet Explorer again
- When prompted whether to make Internet Explorer the default browser, select <YES>
- Close Internet Explorer

STEP 2: UPDATE PLAN INFORMATION IN HPMS

Start the update process by selecting the Update option from the ACTIONS menu item or by clicking on in the toolbar on the **PBP 2006 Management Screen**.
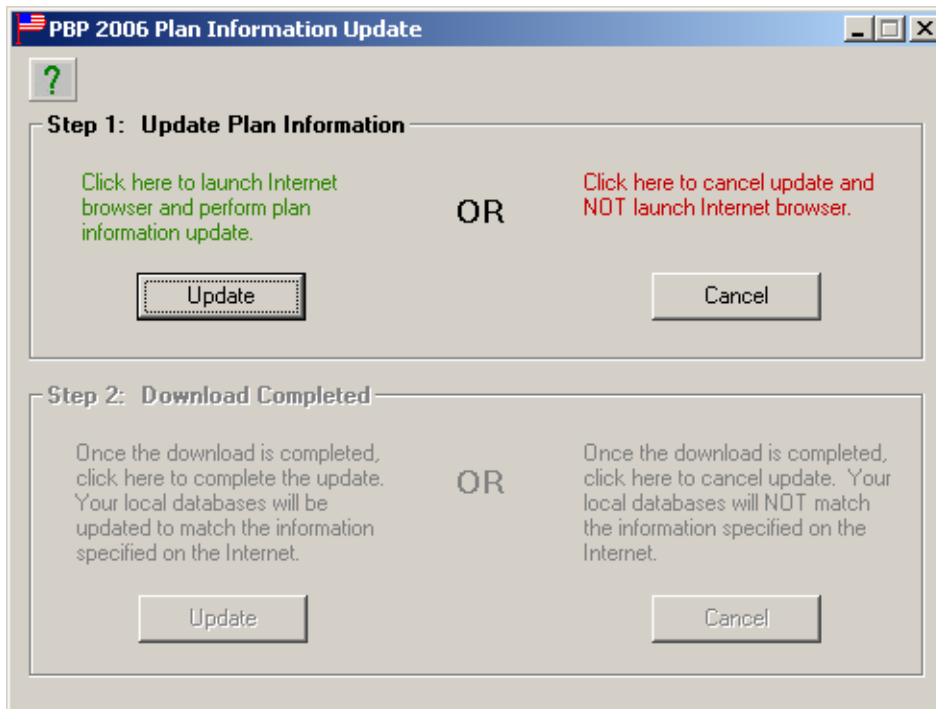
The Plan Information Update screen consists of two steps, **Step 1: Update Plan Information** and **Step 2: Download Completed**. To update plan information, click on the Step 1: Update Plan Information <UPDATE> button. To cancel the update and return to the **PBP 2006 Management Screen**, click on the <CANCEL> button in Step 1.

Clicking on the <UPDATE> button will launch the browser and point it to the HPMS Web Site. After logging in and completing all changes, click on the <DOWNLOAD> button (on the HPMS Web Site). A zip file, UPDATPBP2006.ZIP, is created and contains a new PBPPLANS2006.MDB database. Save this file to the directory where the PBP software is located, and then exit the browser.

The PBP software will be disabled until after the browser has been closed.

STEP 3: UPDATE PLAN INFORMATION ON YOUR COMPUTER
After exiting the browser and returning to the **PBP 2006 Plan Information Update** screen, Step 1 of the update process will be completed (i.e., the updated information has been downloaded) and disabled. Step 2: Download Completed, will then be enabled. To continue the update process, click on the Step 2: Download Completed <UPDATE> button or <CANCEL> to exit.
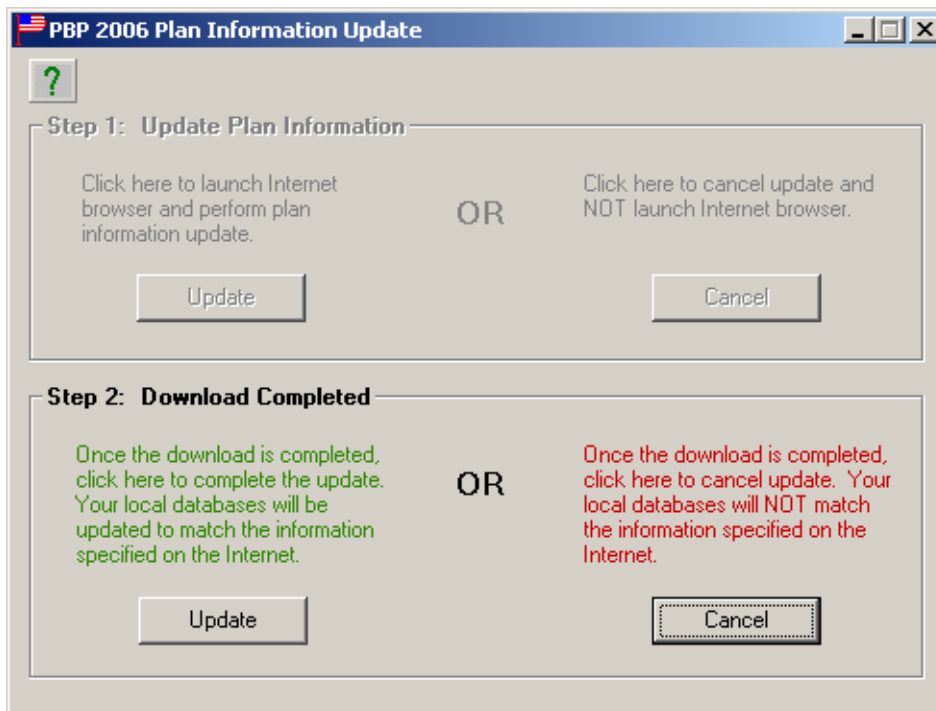

Although the user has the capability to cancel the update process after Step 1 of the update process has been completed, it is **not** recommended. If the user does choose to cancel the update, it will result in the local information being inconsistent with the central information on HPMS. If this option is chosen, the user should contact their Plan Manager or the Help Desk.

View open plans

From the **PBP 2006 Management Screen**, access the **System Status** function from the ACTIONS menu or click on the toolbar button. The System Status screen provides three different selection options available from the drop-down menu: *Incomplete Plans*, *Logged in Users*, and *Open Plans*.
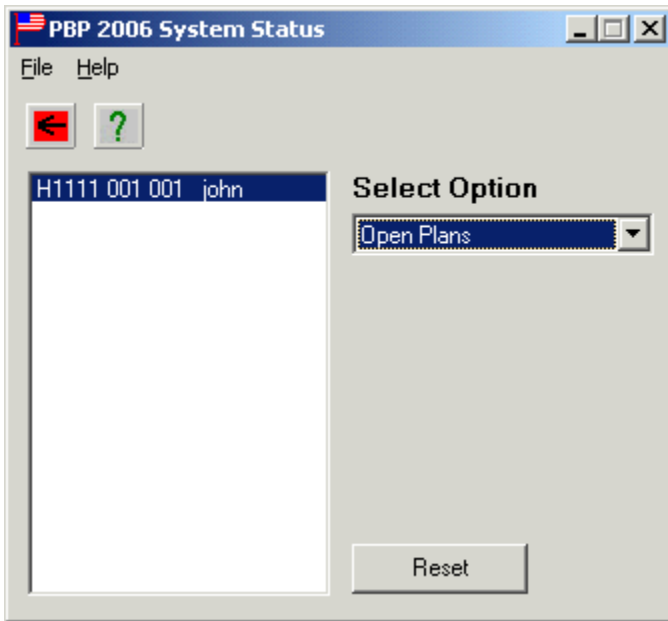
Clicking on the **Open Plans** option will display a list of plans that are currently open for data entry. This feature is especially useful when the PBP software is being used in a network environment. The Super User can easily view the plans that are currently open for data entry.

Reset open status

This feature allows a Super User to reset a plan's open status. When using PBP in a network environment, only one user can access a plan at a time. Users can see whether a plan is in use by an asterisk (*) in the **Open** field for each plan on the **PBP 2006 Management Screen**. A plan is considered open while data entry is being performed. The open status is normally reset (the * disappears from the **Open** field) when a plan is exited during data entry. The * is to show other users on the network what plans are currently being accessed.

Plan ID	Plan Name	Segment #	Assigned User	Open	Status
001	HMO MAPD Plan	1	john	*	A Completed
002	HMOPOS MAPD Plan	1	pbp		A Completed

Step 2: Section A

The **Reset Open Status** function is especially useful when abnormal termination of PBP (e.g., power failure, system lockup) occurs. When PBP is restarted, a user cannot access any plans that were marked as open. A Super User must reset these plans before data entry can continue.

STEP 1: SELECT SYSTEM STATUS/OPEN PLAN(S) MENU OPTION

From the **PBP 2006 Management Screen**, select the System Status option from the ACTIONS menu or click on the <System Status> toolbar button.

On the System Status screen, click on the **Open Plans** option from the *Select Option* drop-down menu to display a list of open plans.

Do **not** assume that <u>all</u> open plans need to be reset. For instance, if a plan(s) was sent to a remote data entry person using the **Export** function, the exported plan(s) would appear on the list of open plans and an asterisk (*) would appear under the Open status on the PBP 2006 Management Screen.

STEP 2: RESET OPEN PLANS

Select a plan from the list on the left that needs to be reset and click on <RESET>. This will clear the **Open** field and reset the currently selected plan. If there is more than one plan that needs to be reset, highlight the next plan and repeat the process until all of the desired plans have been reset.

VIEW/RESET LOGGED IN USERS FUNCTION

View logged in users
From the **PBP 2006 Management Screen**, access the **System Status** function from the ACTIONS menu. The System Status screen provides three different selection options available from the drop-down menu: *Incomplete Plans*, *Logged in Users*, and *Open Plans*.
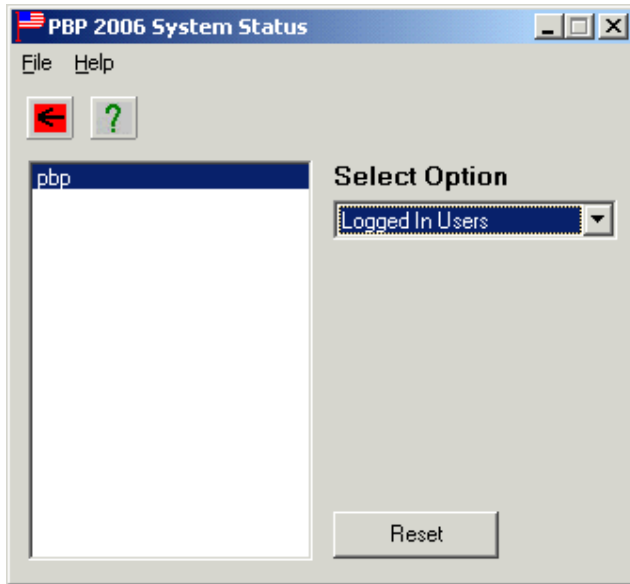
Clicking on the **Logged In Users** option will display the name of the currently logged in user. If PBP is being used in a network environment, a list of all logged in users will be displayed.

Reset logged in users status

This feature allows a Super User to reset a user's logged in status. The **Reset Logged In Users Status** function is especially useful when abnormal termination of PBP (e.g., power failure, system lockup) occurs. When PBP is restarted, a data entry user will not be able to log back into the system. A Super User must reset these User IDs before data entry can continue.

STEP 1: SELECT SYSTEM STATUS/LOGGED IN USERS MENU OPTION

From the **PBP 2006 Management Screen**, select the System Status option from the ACTIONS menu or click on the <System Status> toolbar button.

The System Status screen provides three different selection options available from the drop-down menu: *Incomplete Plans*, *Logged in Users*, and *Open Plans*. Select the **Logged In Users** option.

STEP 2: RESET A USER'S LOGGED IN STATUS

Select a User ID that needs to be reset and click on <RESET>. This will reset the currently selected user. If there is more than one user that needs to be reset, highlight the next User ID and repeat the process until all of the desired users have been reset.

VIEW MY SYSTEM INFORMATION

PBP system file information is available from the Help Menu. To access, click on the HELP menu and select the **About** option.
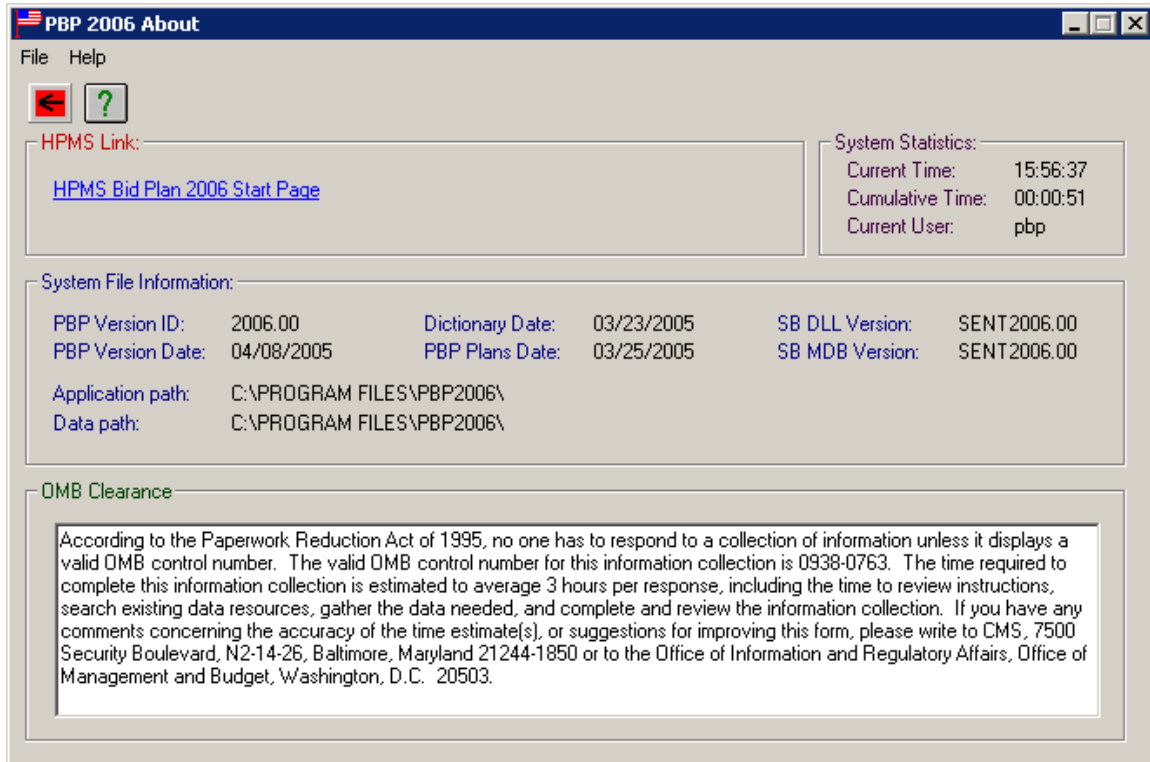
The **PBP 2006 About** screen displays various system file information (i.e., Version ID Number, Version Date, Application Path of where PBP is installed, etc.) along with OMB Clearance information.
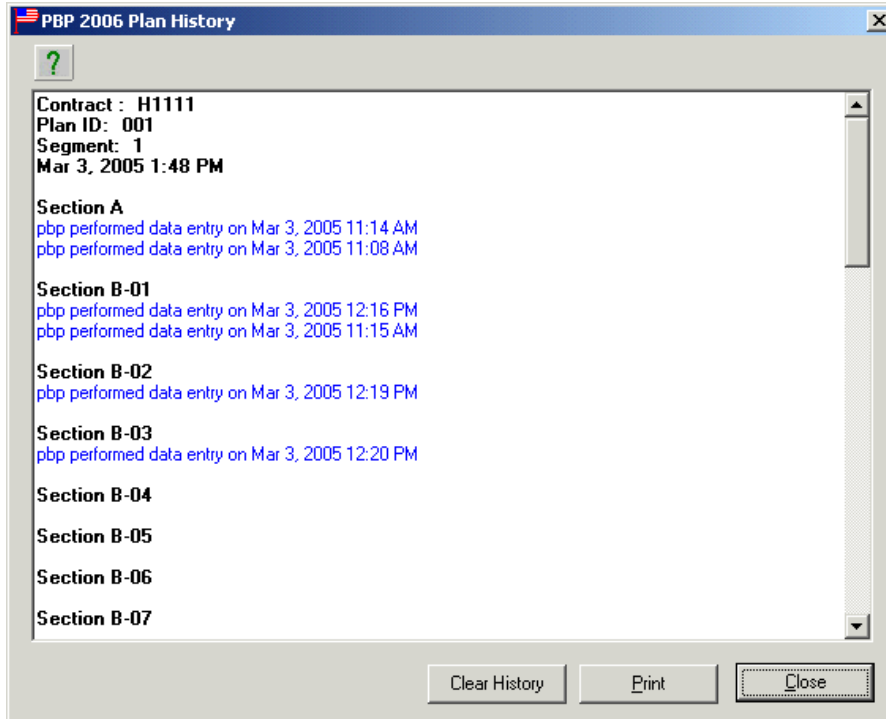

VIEW THE HISTORY OF ACTIVITY FOR A PLAN

STEP 1: SELECT ACTIONS/SHOW HISTORY MENU OPTION

The **Show History** function provides the Super User with the capability to view, print, or clear the history associated with a given plan. On the **PBP 2006 Management Screen**, select a plan to view and select the **Show History** option from the ACTIONS menu, or

click on in the toolbar.

The Contract Number, Plan ID, Segment ID, and Date/Time the report was created are displayed in the heading of the **PBP 2006 Plan History** screen for the plan selected on the **PBP 2006 Management Screen**. Each section of the plan's history is displayed separately: **Data Entry**, **Complete Copy**, **Partial Copy, Export(s), Import(s), SB Verification(s),** and **Upload(s)**.

There are three options available on the **PBP Plan History** screen: <Clear History>, <Print>, and <Close>. The **Clear History** option will clear the history currently displayed on the Plan History screen. Only the Super User has the authority to clear the history displayed on the Plan History Screen.

The Print option will send a copy of the report to the printer.

Click on the <Close> option to return to the **PBP 2006 Management Screen**.

VIEW THE STATUS OF MY DATA ENTRY

From the **PBP 2006 Management Screen**, access the **System Status** function from the

ACTIONS menu or by clicking on ⬛ in the toolbar. The System Status screen provides three different selection options available from the drop-down menu: *Incomplete Plans*, *Logged in Users*, and *Open Plans*.
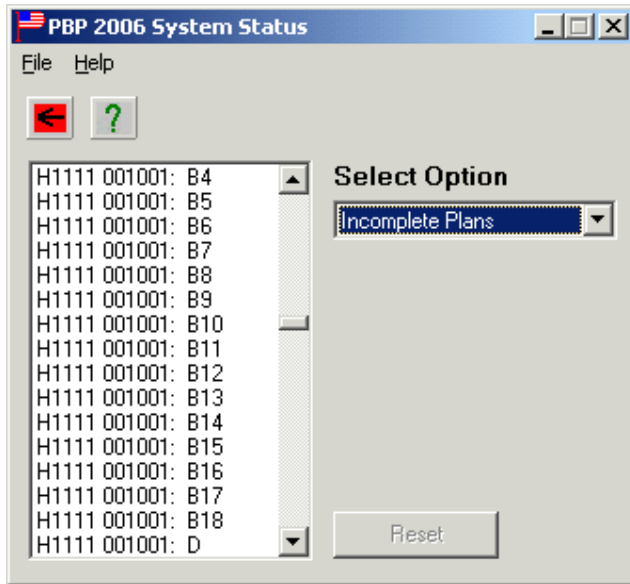
Clicking on the **Incomplete Plans** option will display a list, of all sections by plan, that are incomplete.

COPY PLAN

The **Copy Plan** function gives the Super User the ability to copy the existing data from one plan to another using four different methods: *Complete Copy, Sections A, B, and C only, Partial B Copy, Section C Copy,* or *Section Medicare Rx Copy*.

To access the **Copy Plan** function, click on the ACTIONS menu item and select the Copy Plan option or click on [icon] in the toolbar to display the **PBP 2006 Copy Plan** screen.
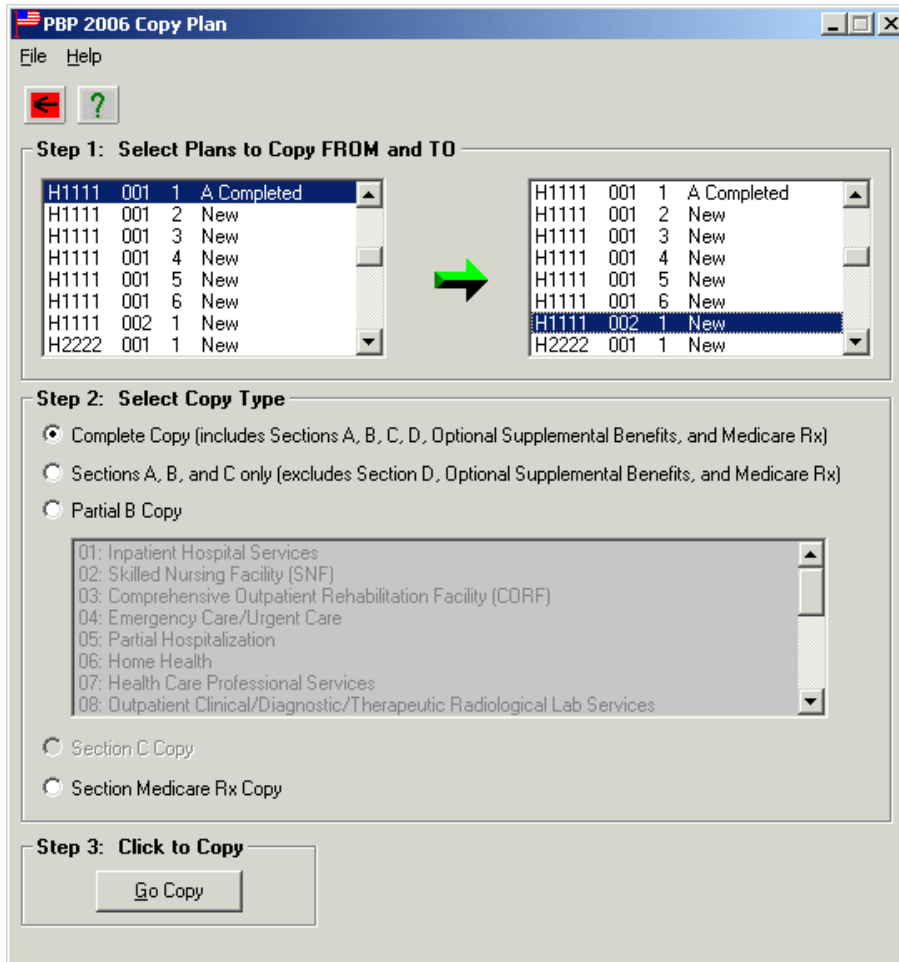
To make a complete copy of the data from one Plan to another Plan, in Step 1 the user can highlight the plans to copy from and to in the *Select Plans to Copy FROM and TO* section. Note that more than one plan can be selected for Copy To. Once the copy FROM and TO plans have been selected, Steps 2 and 3 will be enabled. There are five choices in Step 2, *Complete Copy, Sections A, B, C only copy, Partial B Copy, Section C Copy,* and *Section Medicare Rx Copy.* The default option is to make a Complete Copy of the FROM plan to the TO plan. If this is the desired option, click on the <Go Copy> button in Step 3.

To copy Sections A, B, and C only, select this option and click on <Go Copy>.

To **only** copy one or more Service Categories in Section B from one plan to another plan (sections A, C, D, and Rx will not be included), in Step 2, click on the <Partial B Copy> radio button to enable the list of Service Categories from which to choose. To select more than one Service Category when the categories are listed consecutively, hold down the <SHIFT> key and select (highlight) the first desired item from the list and then select the last desired item from the list.

This feature will highlight all the items between and including the first and last items selected from the list. To select more than one Service Category from the list when the categories are not in consecutive order, hold down the <CTRL> (Control) key and select (highlight) the desired items from the list. The <SHIFT> and <CTRL> keys can also be used together when selecting categories.

After a selection(s) has been made, the **Copy** function in Step 3 will be enabled. Click on the <Go Copy> button to complete the copy process.

To copy only Section C, select the Section C Copy option and click on <Go Copy>.

NOTE: The data copied from one plan to another plan replaces all of the data previously entered in the designated section or service category of the target plan.

To exit the **PBP Copy Plan** screen, click on the arrow <RETURN TO MANAGEMENT SCREEN> toolbar button or select the Return to Management Screen option from the FILE menu item.

EXIT PBP

From the **PBP 2006 Management Screen**, the user may exit the PBP software by clicking on in the toolbar or by selecting the FILE menu item and clicking on the Exit option.