

**TCM - Targeted Case Management - Microsoft Internet Explorer provided by CA Dept. of Health Services**

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**CALIFORNIA THE GOLDEN STATE**

**Add Encounter**

**Program Type\*:** 06-PUBLIC HEALTH  **Case Manager ID\*:**

**Location\*:** Office  **Date of Service\* (MM/DD/CCYY):**

**DOB\* (MM/DD/CCYY):**  **Client ID\* (If entering a BIC number, enter only the first nine characters):**

**Last Name\*:**  **First Name:**

**MI:**  **Newborn DOB\* (MM/DD/CCYY):**

**Optional Field 1:**  **Optional Field 2:**

**Optional Field 3:**   Use Defaults

**Case Management**

Frequently Asked Questions

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**To add an encounter manually, click on "Add".**

**Program Type may be restricted according to your User ID permissions.**

**To upload an electronic file of encounters, click on "Data Transfer" and then "Upload." See separate training for upload instructions.**

Start | Inbox - Microsoft Outlook | Internet | 2:43 PM

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## Add Encounter

Program Type\*: 06-PUBLIC HEALTH Case Manager ID\*: 12345

Location\*: Office Date of Service\* (MM/DD/CCYY):

DOB\* (MM/DD/CCYY): Client ID\* (If entering a BIC number, enter only the first nine characters):

Last Name\*: First Name:

MI: Newborn DOB\* (MM/DD/CCYY):

Optional Field 1: Optional Field 2:

Optional Field 3:

Use Defaults

Save Reset

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Optional fields can be used to address additional LGA needs.

HINT: Use the tab key to move through the fields. Setting "Defaults" may make data entry easier.

Check "Use Defaults" to set data for Program Type, Case Manager ID and Location for every encounter until you change the data for those fields.

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## Add Encounter

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Program Type\*: 06-PUBLIC HEALTH Case Manager ID\*:

Location\*: Office Date of Service\* (MM/DD/CCYY):

DOB\* (MM/DD/CCYY):  Client ID\* (If entering a BIC number, enter only the first nine characters):

Last Name\*:  First Name:

MI:  Newborn DOB\* (MM/DD/CCYY):

Optional Fields

Use Defaults

Save Reset Back

Start Inbox - Microsoft Outlook 2:43 PM

The system will calculate if the 12-month limit has been exceeded.

Must enter either Client ID or Last Name--MEDS match will not be done without Client ID and DOB.

If service is provided to a newborn who does not have a Medi-Cal ID, submit encounter with mother's name and DOB and enter newborn's DOB here.

"Save" processes the encounter.

"Reset" erases any data that was not previously saved.

"Back" takes you out of this function.

Encounter Id 2199110 was added with a status of not eligible

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Program Type\*: 06-PUBLIC HEALTH Case Manager ID\*:  
Location\*: Office Date of Service\* (MM/DD/CCYY):  
DOB\* (MM/DD/CCYY): Client ID\* (If entering a BIC number, enter only the first nine characters):  
Last Name\*: First Name:  
MI: Newborn DOB\* (MM/DD/CCYY):  
Optional Field 1: Optional Field 2:  
Optional Field 3:  
 Use Defaults

Save Reset Back View

The Encounter ID is assigned randomly to the encounter you just saved. You can search by this number.

If the encounter passes the newborn, 12 month, and duplicate check; in addition to the MEDS match, the encounter is claimable. If Medi-Cal cannot be verified, you will get a status of "not eligible."

The form is now clear to add the next encounter...

Or, by clicking "View", you can call up the encounter just entered to modify or review.

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## Encounter - View

Last Name: TEST	First Name: TESS
Encounter ID: 2514801	MI:
Client ID: 55555555	
Encounter Status: NELG	Date of Service: 02/02/2002
Program Type: 06	Sub Program Type:
DOB: 09/11/2000	Newborn DOB:
Case Manager ID: PAPER	Location: OFFICE
LGA Code: 49	Invoice Number:
Invoice Deny	Duplicate Indicator: N
Optional Field 1:	Optional Field 2:
Optional Field 3:	Meds Eligibility Flag: N
Enter Rate: 0.00	Valid Reason:
ursement: 0%	Valid Reason Other:
MEDS Match Fail Reason	
NO RECORD FOUND ON MEDS.	

2002-03-15-

Start | Inbox - Microsoft O... | Microsoft PowerPoi... | Microsoft Image Co... | TCM - Targeted... | 2:55 PM

Status codes are explained on the next slide.

The TCM System checks for potential duplicates within the LGA using Client ID, Program type, Date of Service and Newborn DOB.

If Medi-Cal eligibility cannot be verified, the reason will appear here.



# Encounter Status Codes

CLAM = (Claimable)	Meets all requirements for federal reimbursement
DENY = (Deny)	DHS questioned the validity of this encounter when invoiced or LGA request
DUPE = (Duplicate)	A possible duplicate exists based on Client ID, Program Type, Date of Service and Newborn DOB
EXCD = (Exceeded)	Not claimable because the cap amount for the LGA has been exceeded
EXPD = (Expired)	Entered past the time limitation for submitting an encounter
HOLD = (Hold)	Entered by the LGA when researching an encounter
INAC = (Inactive)	Entered by the LGA when no action is being taken on resolving questions regarding this encounter
INVC = (Invoiced)	This encounter has been attached to an invoice and submitted to DHS
NELG = (Not Eligible)	Medi-Cal eligibility cannot be verified
PAID = (Paid)	Federal reimbursement for this encounter has been received
PEND = (Pending)	Additional information is needed to determine if this encounter is claimable

To add another encounter, click “Add”

To modify the encounter (e.g., to correct an entry error or give a valid reason to override a potential duplicate), click here.

If the encounter has a status of “duplicate”, click here to see any matches.

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### Encounter Modify

Last Name\*:  First Name:

Encounter ID: 2030570 MI:

Client ID\*:  Date of Service\* (MM/DD/YYYY):

Valid Reason:

Valid Reason Other:

Newborn DOB\* (MM/DD/YYYY):

Location\*:

Invoice Duplicate Option Meds Rate of Reimb MEDS Deny Reason

NO RECORD FOUND ON MEDS.

Entry User ID: DHSADM49 Entry Date: 2002-03-18-15.54.38.203057

Last Update User ID: JSABBAG Last Update Time Stamp: 2002-04-02-14.24.35.560962

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**If there is a legitimate reason to override a duplicate status (e.g., client received a significant additional service on the same day for a different purpose), choose a Valid Reason from the pull down menu.**

**If Valid Reason is "Other", you must describe the reason in the 'Valid Reason Other' field.**

**Click one of these buttons to process**

Start TCM - Targeted ...

2:30 PM



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### Encounter - View

Encounter Id 2030570 was modified with a status of not eligible

Last Name: TEST	First Name: TESS
Encounter ID: 2030570	MI:
Client ID: 55555555	
Encounter Status: NELG	Date of Service: 02/02/
Program Type: 06	Sub Program Type:
DOB: 12/29/1969	Newborn DOB:
Case Manager ID: PAPER	Location: HOME
LGA Code: 49	Invoice Number:
Encounter Invoice Deny Reason:	Duplicate Indicator: Y
Optional Field 1:	Optional Field 2:
Optional Field 3:	Meds Eligibility Flag: N
Encounter Rate: 0.00	Valid Reason: 00-OTHER
Rate of Reimbursement: 0%	Valid Reason Other: EXPLANATION HERE!

MEDS Match Fail Reason

NO RECORD FOUND ON MEDS.

Entry User ID: DHSADM49	Entry Date: 2002-03-18-15.54.38.203057
Last Update User ID: JSABBAG	Last Update Time Stamp: 2002-04-02-14.55.14.728010

Modify Back List Show Matches

**The Valid Reason is shown on the "Encounter View" screen.**

**To view the other encounters that matched this one for Client ID, DOS, Program Type and DOB, click here.**

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## Duplicates for Encounter 2030570

Displaying 1 through 2 of 2

Encounter ID	Status	Last Name	First Name	MI	Type	Date of Service	Case Manager	Valid Reason
2514801	NELG	TEST	TESS		06	02/02/2002	PAPER	
2030570	NELG	TEST	TESS		06	02/02/2002	PAPER	00

Back To View

**A Valid Reason code will be seen if the duplicate status has been overridden:**

- 00 - Other**
- 01 - Significant Additional Visit**
- 02 - Multiple Births**

Start | TCM - Targe... | Microsoft Powe... | GroupWise - M... | Mail From: Pete... | CD Player - [10]... | Master Out | 4:08 PM

When the encounter passes all requirements, the status becomes "claimable"

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### Encounter - View

Encounter Id 5120581 was modified with a status of **claimable**

Last Name: TEST	First Name: TESS
Encounter ID: 5120581	MI:
Client ID: 463779999	
Encounter Status: CLAM	Date of Service: 02/01/2002
Program Type: 06	Sub Program Type:
DOB: 12/29/1969	Newborn DOB:
Case Manager ID: PAPER	Location: OFFICE
LGA Code: 49	Invoice Number:
Encounter Invoice Deny Reason:	Duplicate Indicator: N
Optional Field 1:	Optional Field 2:
Optional Field 3:	Meds Eligibility Flag: Y
Encounter Rate: 0.00	Valid Reason:
Rate of Reimbursement: 0%	Valid Reason Other:
MEDS Match Fail Reason	
Entry User ID: DHSADM49	Entry Date: 2002-03-15-14.28.44.512058
Last Update User ID: JSABBAG	Last Update Time Stamp: 2002-04-03-09.53.53.379142

Modify Back List

Start Group... DHS-T... CD Pla... Foreign... Master ... Micros... TCM ... 9:52 AM

To search for an encounter, you may search by any of these fields and then click on "submit."

Caution--There is a search limit. TCM will only return 2000 encounters at a time.


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## Encounter Search Results

Displaying 1 through 4 of 4

Encounter ID	Status	Last Name	First Name	MI	Type	Date of Service	Case Manager	Valid Reason
<a href="#">0625670</a>	EXPD	TEST	TESS	06	06	02/01/2001	PAPER	
<a href="#">5120581</a>	CLAM	TEST	TESS	06	06	02/01/2002	PAPER	
<a href="#">2030570</a>	NELG	TEST	TESS	06	06	02/02/2002	PAPER	00
<a href="#">2514801</a>	NELG	TEST	TESS	06	06	02/02/2002	PAPER	

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**The results of your search will be displayed like this. You can click on the “Encounter ID” and view that encounter record.**


Start GroupWi... DHS-TC... CD Play... Foreign... Master Out Microsoft... TCM - ... 8:58 AM

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## Log Off TCM System

Thank You for Using the Targeted Case Management System

Please click the button to exit the Targeted Case Management System.

This button will close your browser for security reasons.



**You must Log Off the TCM System when you are done. Remember confidentiality!**

The screenshot shows a Microsoft Internet Explorer browser window displaying the TCM (Targeted Case Management) system. The address bar shows the URL: <https://tcm.dhs.ca.gov/servlet/gov.ca.dhs.tcm.user.UserServlet>. The page header includes the California state logo and the text "CALIFORNIA THE GOLDEN STATE". The main content area features a large heading "Log Off TCM System" and a "Log Off" button. A "Microsoft Internet Explorer" dialog box is overlaid on the page, displaying a question mark icon and the text: "The Web page you are viewing is trying to close the window. Do you want to close this window?" with "Yes" and "No" buttons. A callout bubble points to the "Yes" button with the text: "When you click on 'Yes', the TCM System will close your internet browser- -this is necessary to break the secure link to the TCM System." The taskbar at the bottom shows the Start button, several open applications including "Inbox - Mic...", "Microsoft...", "13. Unkno...", "TCM - Tar...", "Volume Co...", "TCM - T...", and "untitled - P...", along with the system clock showing 3:48 PM.