



## Next steps with Covivitas!

Thank you for your interest in Covivitas, the eChecker™ and our Medicaid Eligibility processing and reports. We're very excited to move ahead with your installation and here are the next steps to bring you easy, accurate and reliable eligibility information:

1. I have attached three business documents to this email:
  - a. **A HIPAA Business Associates Agreement for your clinic.** Please sign this and either email it to:  
[mdepaolo@covivitas.com](mailto:mdepaolo@covivitas.com)  
or mail a hard copy to:  
**Covivitas**  
**PO Box 41314**  
**Long Beach, CA 90853**
  - b. **Two invoices** – one for installation and month to month and one for installation plus one year. The one year invoice includes a 10 % discount.

Upon receipt of the signed HIPAA documents and payment, we can move ahead with the installation.

To complete your installation, we will need:

1. **Your clinic specific Medicaid website log in and password.** We check the eligibility for your clinic ONLY under the specific credentials for your organization.
2. **A file with four key pieces of patient/client information:**

**Patient MediCal ID - if available**

**Patient SSN - if available**

**Patient Date of Birth**

**Internal Patient ID number**

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3. You can also fill out the file with details - these would be **the fields YOU want to see on the report:**

- Patient Name**
- Patient Location**
- Patient Gender**
- Provider Information**
- Program Information...**

Just to give some examples.

4. We're going to add the following fields to the report:

- MediCal Message
- HIC Number
- BIC Number
- County Codes
- Special Aid Codes

And any other fields available from the Medicaid website that you may need.

We'll also supply a **Proof of Eligibility file** (PDF printout of the website response) for many states in a separate file that can be printed or kept for archive purposes.

5. We will set up a **ShareFile Folder** for your clinic at **Covivitas.sharefile.com**. This is a fully secure, HIPAA compliant, and very easy to use file transfer process that will act as transfer method for your information. All you have to do is:
  - a. Log into ShareFile
  - b. Upload your file into the **Upload to Covivitas** folder. Sharefile will send us an email letting us know that your files are available. We'll run them...
  - c. And you can download the results at the **Download from Covivitas** folder.

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6. Once we have the test file, we can run it against MediCal and take a look at the results. Upon the completion of the test run, you'll receive three files:

**The Covivitas Eligibility Report** - an Excel 2003 or 2007 workbook that has summaries and interpretations of the results, including comparisons.

**The Proof of Eligibility file** - the MediCal website responses for each positive response (has MediCal) OR for Positive and Negative responses. It's up to you!

**The Retroactive Report** - an Excel 2003 or 2007 spreadsheet that tracks retroactive eligibility of patients.

These reports and results can be customized to fit your business processes so let us know if you want to make any changes or additions.

Once the files have been completed to your satisfaction, we can schedule the file processing to run automatically on a regular basis.

If you have any questions, please feel free to email us at [covivitas@covivitas.com](mailto:covivitas@covivitas.com) and visit our website at [www.covivitas.com](http://www.covivitas.com).

Sincerely,

A handwritten signature in blue ink, appearing to read 'MD', with a long horizontal flourish extending to the right.

Michael DePaolo  
Founder, Covivitas