



Provider Portal: Eligibility Transactions User Guide

California Medicaid Management Information System

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Overview

Introduction to the Provider Portal

The Provider Portal is an area within the Medi-Cal Providers website that houses general information and day-to-day work for Medi-Cal providers and provider healthcare staff. It focuses on reducing paper communications between the Department of Health Care Services (DHCS) and provider communities, increasing the security and accessibility of Medi-Cal electronic services and empowering providers in managing their organization to support their billing needs.

Objective

The purpose of the *Provider Portal User Guide: Eligibility Transaction* is to provide step-by-step instruction on how to submit Single Subscriber, Share of Cost (SOC) and Multiple Subscriber transactions in the Provider Portal.

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Access Transaction Center

Provider Portal users may follow the steps below to access Eligibility transactions through the Transaction Center.

1. Navigate to the [Medi-Cal Providers website](#) and select the **Login to Provider Portal** link or select from the drop-down Provider Portal tab.
2. Once the Provider Portal dashboard is displayed, select **Get Started** on the **Transaction Center** tile.

Note: If an organization has multiple National Provider Identifiers (NPIs), select the appropriate NPI from the Global NPI Selector.

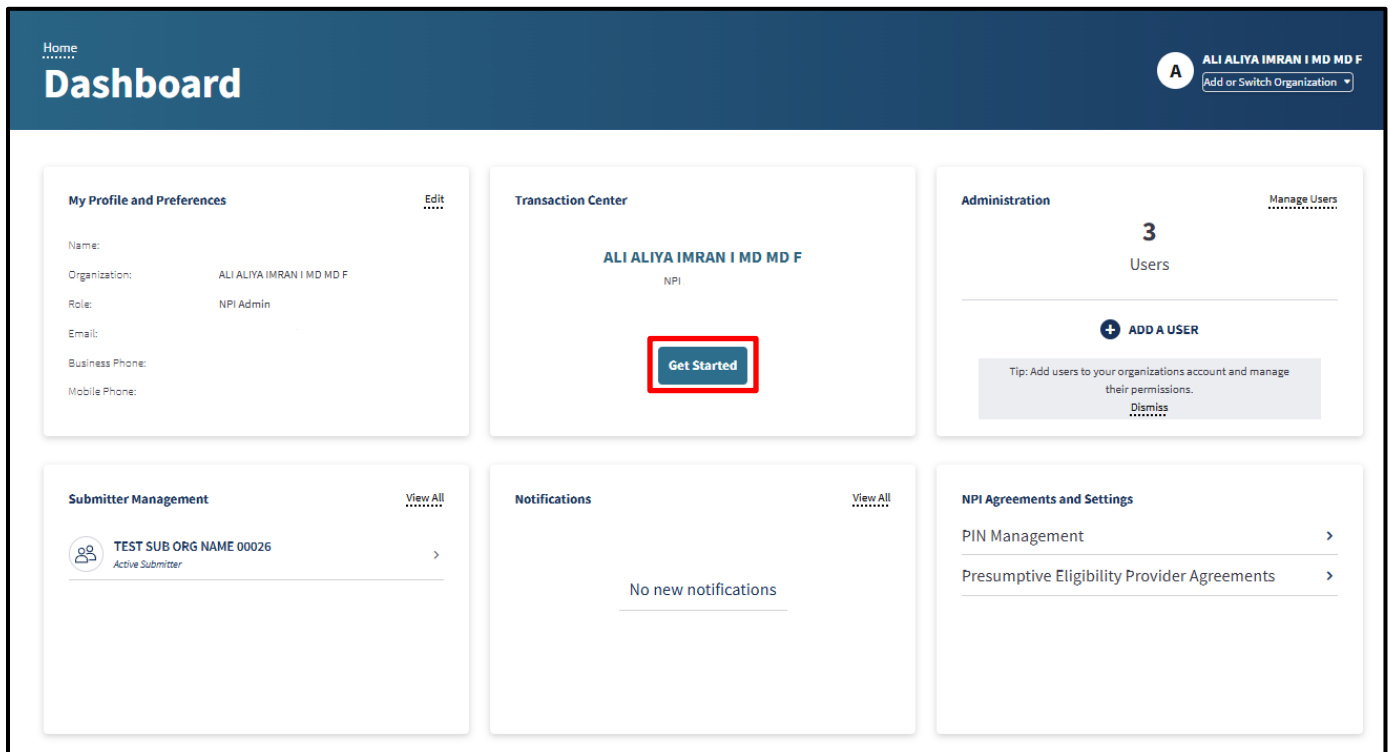


Figure 1.1: Transaction Center Tile of the Provider Portal Dashboard.

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3. In the **Transaction Center**, select one of the following Eligibility transaction links:
- **Single Subscriber**
 - **Share of Cost**
 - **Multiple Subscriber**

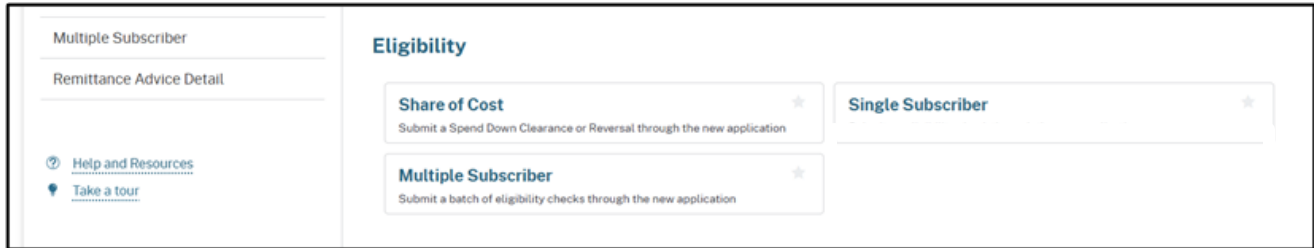


Figure 1.2: Eligibility Transactions in the Transaction Center.

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Single Subscriber Eligibility

To verify Single Subscriber eligibility, follow the steps below:

1. Select the **Single Subscriber** link in the **Eligibility** section of the Transaction Center.

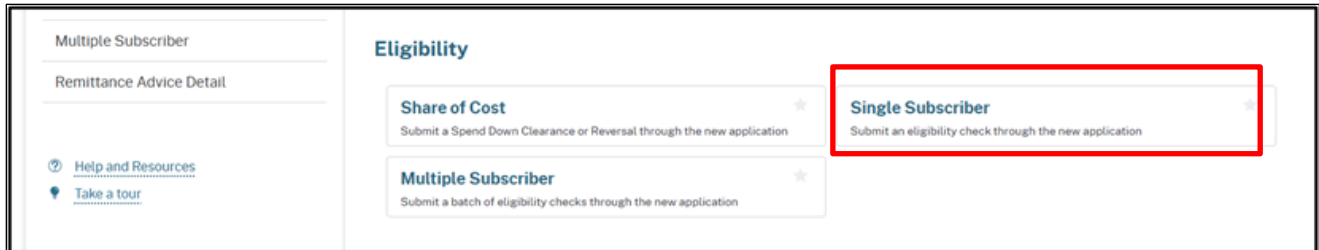


Figure 2.1: Single Subscriber Link in the Eligibility Section.

2. Enter the Subscriber Information in the required fields and select **Search**.




The screenshot shows the 'Single Subscriber Eligibility' form. At the top, there is a header with 'Home / Transaction Center' and 'Single Subscriber Eligibility'. Below the header, there is a section titled 'Subscriber Information' with a note: 'Providers should verify a beneficiary's eligibility in the current month or up to 12 months prior by obtaining their Beneficiary Identification Card (BIC)'. The form contains four required fields: 'Subscriber ID' (BIC or CIN number), 'Issue Date' (mm/dd/yyyy), 'Subscriber Birth Date' (mm/dd/yyyy), and 'Service Date' (mm/dd/yyyy). A red rectangular box highlights the 'Search' button at the bottom right of the form.

Figure 2.2: Subscriber Information.

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Eligibility Responses

After submitting the subscriber's information, an eligibility response screen will appear near the top of the page with one of the following responses:


- A green icon with a check mark () means eligibility is established, and providers may render services.
- A yellow icon with an exclamation point () directs providers' attention to special circumstances.
- A red icon with an exclamation point () means no Medi-Cal eligibility was found.

Once the response appears, users can select **Share of Cost for this Subscriber or New Eligibility Inquiry** to continue.

Eligibility Response

Read the eligibility message carefully for special circumstances.

Eligibility transaction performed by 0123456788 on Wednesday, January 12, 2022 at 11:36:44 AM PST



SUBSCRIBER LAST NAME: TESTJ. MEDI-CAL SUBSCRIBER HAS A \$01330 SOC/SPEND DOWN. PART A,B AND D MEDICARE COV W/MEDICARE ID #. MEDICARE PART A AND B COVERED SVCS MUST BE BILLED TO MEDICARE BEFORE BILLING MEDI-CAL. NO MEDI-CAL PAYMENT FOR MEDICARE PART D COVERED DRUGS.

Subscriber Name:	Subscriber ID:
TestJ, Cammis	900005048A0391
	Submitted ID:
	987654321

Spend Down Case Number 4:	Spend Down Case 4 Balance:
12348	\$100.00

[Share of Cost for this Subscriber](#)[New Eligibility Inquiry](#)

Figure 2.3: Single Subscriber Eligibility Response Summary.

Share of Cost (SOC)

Some Medi-Cal recipients may be required to pay a portion of their medical expenses before Medi-Cal will reimburse providers for services. This portion is known as the SOC or spend down amount.

To access SOC, follow the steps below:

1. Click the **Perform Share of Cost** button after performing a Single Subscriber Eligibility check or select the **Share of Cost** link in the **Eligibility** section of the Transaction Center.

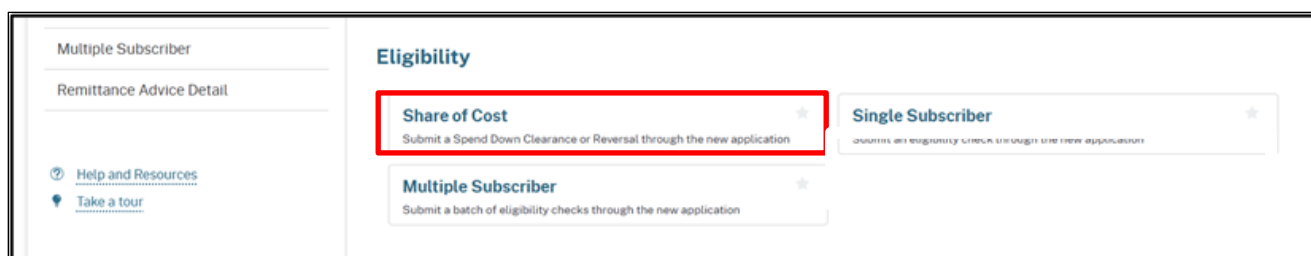


Figure 3.1: Share of Cost link in the Eligibility section.

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2. Users have the option of applying or reversing a SOC by indicating which transaction they want to complete. The user can only reverse a SOC if the total SOC has not been cleared. Select SOC (Spend Down) Application or SOC (Spend Down Reversal). Enter the applicable information in the required fields and select **Submit**.

The screenshot shows the 'Share of Cost (SOC)' page in the Provider Portal. The page has a dark blue header with 'Home / Transaction Center' on the left and a user profile icon with 'Add or Switch Organization' on the right. The main title is 'Share of Cost (SOC)'. Below this is a form titled 'SOC / Spend Down Clearance' with a note '*Indicates required field'. The form is divided into two sections: 'SOC Application/Reversal' and 'SOC (Spend Down) Transaction Detail'. In the first section, there are two radio buttons: 'SOC (Spend Down) Application' (selected) and 'SOC (Spend Down) Reversal'. The second section contains several required fields: 'Subscriber ID' (with a sub-label 'BIC or CIN number'), 'Issue Date', 'Subscriber Birth Date', 'Service Date', 'Procedure Code', 'Total Claim Charge Amount', 'Case Number', and 'SOC (Spend Down) Amount Applied'. Each of these fields has a corresponding input box. At the bottom right of the form, there is a blue 'Submit' button highlighted with a red rectangle.

Home / Transaction Center

Share of Cost (SOC)

0 Add or Switch Organization

SOC / Spend Down Clearance

*Indicates required field

SOC Application/Reversal

☒ SOC (Spend Down) Application ☐ SOC (Spend Down) Reversal

SOC (Spend Down) Transaction Detail

Subscriber ID *
BIC or CIN number

Issue Date *
mm/dd/yyyy

Subscriber Birth Date *
mm/dd/yyyy

Service Date *
mm/dd/yyyy

Procedure Code *
Procedure Code

Total Claim Charge Amount *
Charge Amount

Case Number
Case Number

SOC (Spend Down) Amount Applied
Amount Applied

Submit


Figure 3.2: SOC/ Spend Down Clearance.

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- The SOC/Spend Down Clearance Response will appear. Once the response is reviewed, select **New Eligibility Inquiry** to start a new Single Subscriber Eligibility inquiry.

SOC/Spend Down Clearance Response

SOC/Spend Down Clearance transaction performed by 1234567890 on Wednesday, January 12, 2024 at 11:36:44 AM PST



Subscriber last name: TestJ. SOC/SPEND DOWN AMT ADDED: \$0.00. REMAINING SOC/SPEND DOWN \$1330.00 SOC/SPEND REVERSAL APPLIED. MEDI-CAL SUBSCRIBER HAS A \$01330 SOC/SPEND DOWN, PART A B AND D MEDICARE COV W/MEDICARE ID #. MEDICARE PART A AND B COVERED SVCS MUST BE BILLED TO MEDICARE BEFORE BILLING MEDI-CAL NO MEDI-CAL PAYMENT FOR MEDICARE PART D COVERED DRUGS.

Subscriber Name:	Subscriber ID:
TestJ, Cammis	900005048A0391
	Submitted ID:
	987654321
Subscriber Birth Date:	Issue Date:
12/22/1966	03/03/2023
Procedure Code:	Total Claim Charge Amount:
99211	
Case Number:	Spend Down Amount Applied:
Primary Aid Code:	First Special Aid Code:
Second Special Aid Code:	Third Special Aid Code:
Responsible County:	Medicare ID:

Spend Down Case Number 4:	Spend Down Case 4 Balance:
122345	\$100.00

New Eligibility Inquiry

Figure 3.3: SOC/Spend Down Clearance Response Summary.

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Multiple Subscriber Eligibility

To access Multiple Subscriber Eligibility, follow the steps below:

1. Select the **Multiple Subscribers** link in the **Eligibility** section of the Transaction Center.

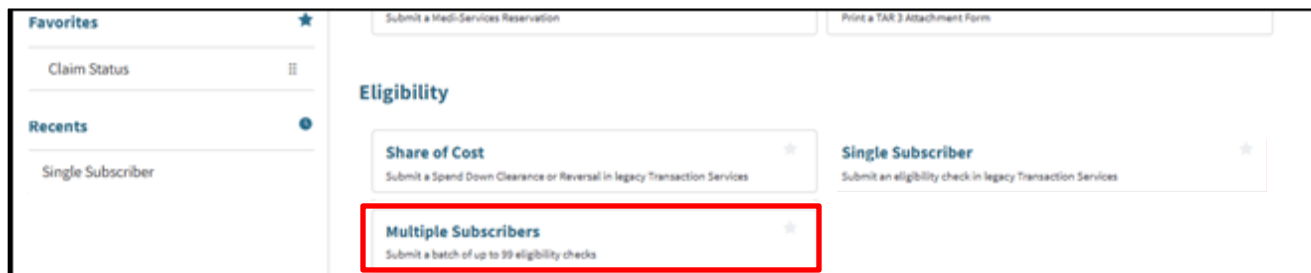


Figure 4.1: Multiple Subscriber Eligibility Link in the Eligibility Section.

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2. Download the Template in Excel or CSV formats, but only CSV formats can be uploaded. To download a template, select **Download .xls Template** or select the **Download a .csv template** link.
3. Eligibility can be checked for up to 200 members at a time. Fill out the template and ensure all required fields are filled.
4. To upload a completed template, select **Select a File to Upload** or drag and drop the file into the center box. Once complete, select **Submit**.

Note: Files must be in CSV format using the template provided on this page. In Excel, select Save As and change the file format to **.csv**.

Download a Multiple Subscriber Template

Check the eligibility of up to 200 beneficiaries at one time. Download the template and fill out the required fields (indicated by an asterisk). The other fields are optional for your own tracking and processing use. You must save your file in .csv format for uploading.

[Download .xls Template](#)
[Don't have Excel? Download a .csv template](#)

Upload a File for Processing

Upload one file at a time for processing. Files must be in .csv format, using the template provided on this page.

.csv files only | Maximum 200 subscribers

Figure 4.2: Download a Template or Upload a File.

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5. A pop-up window will appear. Select **Continue without Downloading** to proceed to the Responses page or select **Download** to the desired file format.

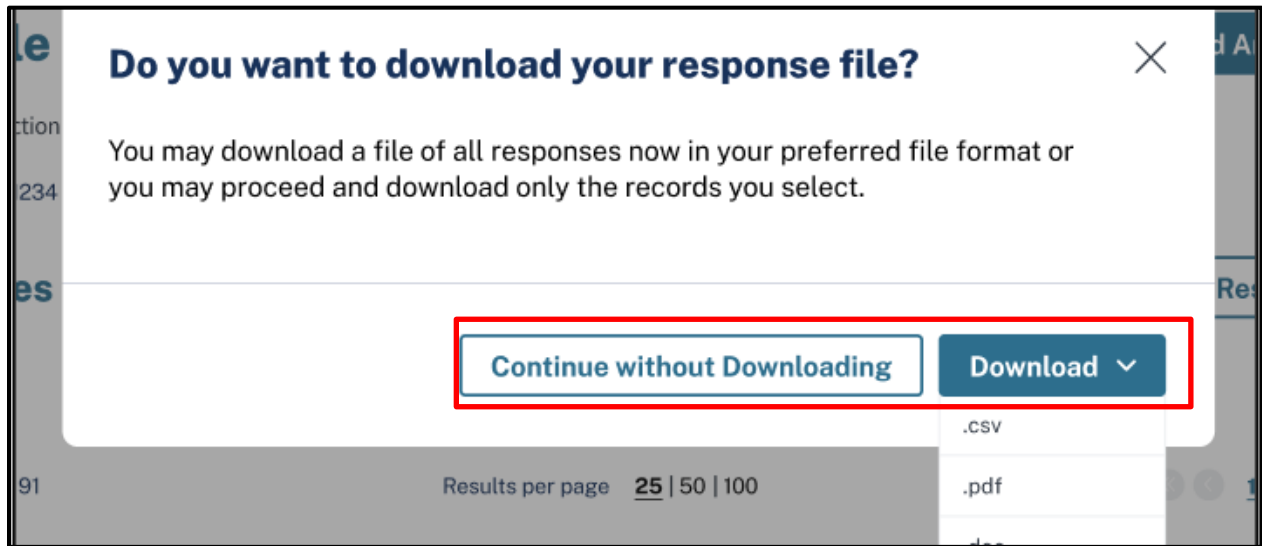


Figure 4.3: Download the Response File.

6. Responses are also displayed on the Responses page. They can be filtered by response type and sorted by using the column headings.

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7. Select **Upload Another File** to begin the process again. If the file has more than 200 members, it will need to be split into multiple files and updated separately.

Note: Results will no longer be displayed after navigating away from the page. A new file will need to be uploaded to view the responses.

Multiple Subscriber Eligibility Response

Eligibility transaction performed by 0123456788 on Wednesday, January 12, 2022 at 11:36:44 AM PST

File Name: 1234 Test **Number of Subscribers:** 91

Responses Download All Responses ▾

Filter

Showing 1-25 of 91 Results per page **25** | 50 | 100 1 2 3 > >>




<input type="checkbox"/>	Response ▲	Subscriber ID ▾	Provider's Subscriber Name ▾	Birth Date	Patient Acct. No. ▾	Service Date ▾	▾
<input type="checkbox"/>	✓	6452****			Content	05/03/2023	▾
<input type="checkbox"/>	✓	6452****				05/03/2023	▾
<input type="checkbox"/>	✓	6452****			Content	05/03/2023	▾
<input type="checkbox"/>	✓	6452****				05/03/2023	▾
<input type="checkbox"/>	!	6452****			Content	05/03/2023	▾
<input type="checkbox"/>	!	6452****			Content	05/03/2023	▾
<input type="checkbox"/>	✗	6452****			Content	05/03/2023	▾
<input type="checkbox"/>	✗	6452****				05/03/2023	▾

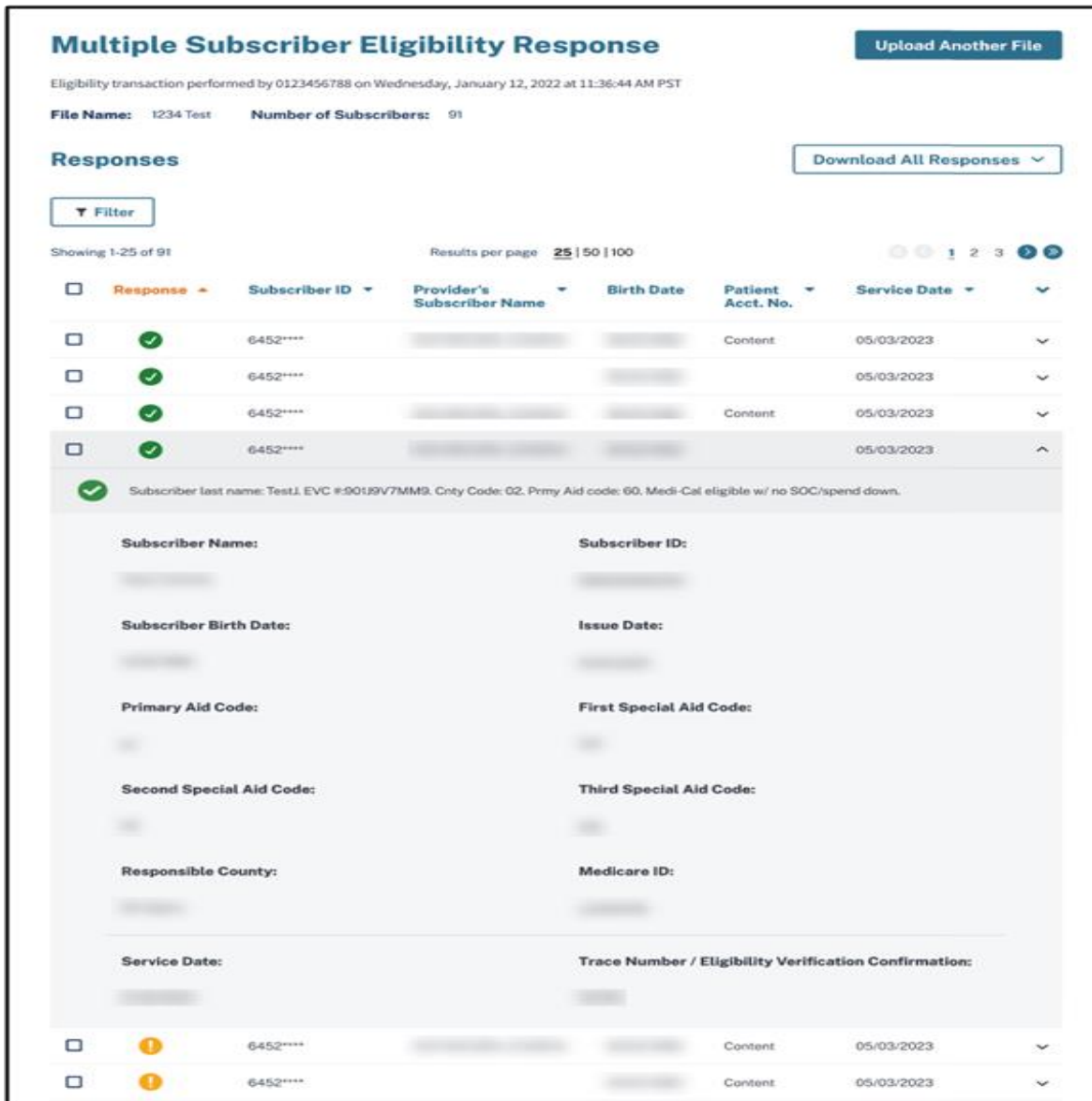
Figure 4.4: List of Responses.

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Eligibility Responses

Once the Multiple Subscriber response list appears, users can select anywhere in the row to expand a response and review the below messages:

- A green icon with a check mark () means eligibility is established, and providers may render services.
- A yellow icon with an exclamation point () directs providers' attention to special circumstances.
- A red icon with a "x" () means no Medi-Cal eligibility was found.



Multiple Subscriber Eligibility Response





Eligibility transaction performed by 0123456788 on Wednesday, January 12, 2022 at 11:36:44 AM PST


File Name: 1234 Test **Number of Subscribers:** 91

Responses [Download All Responses](#)

[Filter](#)

Showing 1-25 of 91 Results per page: 25 | 50 | 100

<input type="checkbox"/>	Response	Subscriber ID	Provider's Subscriber Name	Birth Date	Patient Acct. No.	Service Date
<input type="checkbox"/>		6452****			Content	05/03/2023
<input type="checkbox"/>		6452****				05/03/2023
<input type="checkbox"/>		6452****			Content	05/03/2023
<input type="checkbox"/>		6452****				05/03/2023

 Subscriber last name: Test1 EVC #:00189V7MM9. Cnty Code: 02. Prmy Aid code: 60. Medi-Cal eligible w/ no SOC/spend down.

Subscriber Name: **Subscriber ID:**

Subscriber Birth Date: **Issue Date:**

Primary Aid Code: **First Special Aid Code:**

Second Special Aid Code: **Third Special Aid Code:**

Responsible County: **Medicare ID:**

Service Date: **Trace Number / Eligibility Verification Confirmation:**



<input type="checkbox"/>		6452****			Content	05/03/2023
<input type="checkbox"/>		6452****			Content	05/03/2023

Figure 4.5: Multiple Subscriber Eligibility Response Summary.

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Download response files in multiple formats including .csv, .pdf or .doc. The download will automatically begin upon selecting the file type.

The screenshot shows the 'Multiple Subscriber Eligibility Response' page. At the top right is a button 'Upload Another File'. Below the title, it says 'Eligibility transaction performed by 0123456788 on Wednesday, January 12, 2022 at 11:36:44 AM PST'. Below that, 'File Name: 1234 Test' and 'Number of Subscribers: 91'. The 'Responses' section has a 'Filter' button. Below the filter, it says 'Showing 1-25 of 91' and 'Results per page 25 | 50 | 100'. A table lists responses with columns: Response (checkbox), Status (green check, yellow exclamation, red X), Subscriber ID, Provider's Subscriber Name, Birth Date, Patient Acct. No., and Service Date. A red box highlights the 'Download All Responses' dropdown menu, which shows options for .csv, .pdf, and .doc.

<input type="checkbox"/>	Response ▲	Subscriber ID ▼	Provider's Subscriber Name ▼	Birth Date ▼	Patient Acct. No. ▼	Service Date ▼	▼
<input type="checkbox"/>	✓	6452****	EDS RECORD, CCS001A	09/25/1983	Content	05/03/2023	▼
<input type="checkbox"/>	✓	6452****		09/25/1983		05/03/2023	▼
<input type="checkbox"/>	✓	6452****	EDS RECORD, CCS001A	09/25/1983	Content	05/03/2023	▼
<input type="checkbox"/>	✓	6452****	EDS RECORD, CCS001A	09/25/1983		05/03/2023	▼
<input type="checkbox"/>	!	6452****	EDS RECORD, CCS001A	09/25/1983	Content	05/03/2023	▼
<input type="checkbox"/>	!	6452****		09/25/1983	Content	05/03/2023	▼
<input type="checkbox"/>	✗	6452****	EDS RECORD, CCS001A	09/25/1983	Content	05/03/2023	▼

Figure 4.6: Download All Responses Format Selector.

Review and Fix Errors

Review the errors below or download the error .txt file, make the necessary corrections and re-upload the file. If errors are detected in the file, a message appears at the top of the screen notifying users of the number of errors found and how to make corrections to the file.

1. Select **Download Error File** to fix the errors and reupload a new file.

The screenshot shows the 'Review Errors' page. At the top right is a button 'Download Error File'. Below the button, it says 'Please review the errors below or download the error .txt file, make the necessary corrections, and re-upload the file.' Below that, it lists errors for 'Row 6 - Subscriber ID 9000***' and 'Row 7 - Subscriber ID 9000***', both stating 'The Service Date must be this month or within the prior 12 months.'

Figure 4.7: Review Errors.

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2. Within the Fix Errors section, the uploaded file's information with errors is highlighted in red. Hover over an error icon to see a tooltip with details and select into a cell to correct the information.

The screenshot shows the 'Fix Errors' interface. At the top, a dark blue header contains the text 'Fix Errors' and a dropdown arrow. Below the header, a paragraph explains the error handling process. A 'Check Errors' button is visible, followed by a red status message: 'Fix 2 remaining errors before submitting.' To the right, a toggle switch is labeled 'Unresolved (2)'. A table displays subscriber information with columns: Subscriber ID, Issue Date, Date of Birth, Service Date, Patient Acct. No., Subscriber First Name, and Subscriber Last Name. Two rows are shown, both with red error icons in the Service Date column. A tooltip is displayed over the first error icon, stating: 'The Service Date must be this month or within the prior 12 months.' At the bottom right, there are buttons for 'Download File (.csv)' and 'Submit'.

Subscriber ID	Issue Date	Date of Birth	Service Date	Patient Acct. No.	Subscriber First Name	Subscriber Last Name
90005839S	9/4/2024	4/3/2006	1/1/2024			
90005839S04125	9/4/2024	4/3/2006	1/1/2024			

Figure 4.8: Error Tooltip.

3. By default, the response list displays the error responses. The full list of responses can be displayed by selecting the **Unresolved** toggle.

This screenshot shows the 'Fix Errors' interface with the 'Unresolved' toggle highlighted by a red box. The toggle is currently turned off, and the status message reads 'Fix 2 remaining errors before submitting.' The table below shows a list of subscriber responses. The first five rows have error icons in the Service Date column, and the last two rows have error icons in the Patient Acct. No. column. The 'Unresolved' toggle is located at the top right of the table area. At the bottom right, there are buttons for 'Download File (.csv)' and 'Submit'.

Subscriber ID	Issue Date	Date of Birth	Service Date	Patient Acct. No.	Subscriber First Name	Subscriber Last Name
90005100A	10/18/1993	2/18/1980	6/1/2024	testemail@yahoo.com	ABCdee234@\$%	donothaveone
90005100A3	10/18/1993	2/18/1980	4/1/2024			
90008101S	3/8/2013	3/8/1983	7/1/2024			
90008101S5	3/8/2013	3/8/1983	4/1/2024			
90005839S	9/4/2024	4/3/2006	1/1/2024			
90005839S04125	9/4/2024	4/3/2006	1/1/2024			

Figure 4.9: Multiple Subscriber Eligibility Response Summary.

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- After correcting the errors, the modified cell changes highlight from red to yellow, select **Check Errors** to verify that all issues are resolved.

The screenshot shows the 'Fix Errors' interface. At the top, a dark blue header contains the text 'Fix Errors' and a dropdown arrow. Below the header, a message states: 'Below is your uploaded file's information with errors highlighted in red. Hover over an error icon to see details, and click into a cell to correct the information. After correcting the errors, click "Check Errors" to verify that all issues are resolved. When no errors remain, you can download the corrected file or submit it for processing.' A red box highlights the 'Check Errors' button, which is a dark blue button with a white document icon and the text 'Check Errors'. To the right of the button, a red message says 'Fix 2 remaining errors before submitting.' Further right is a toggle switch labeled 'Unresolved (2)'. Below this is a table with the following columns: 'Subscriber ID', 'Issue Date', 'Date of Birth', 'Service Date', 'Patient Acct. No.', 'Subscriber First Name', and 'Subscriber Last Name'. The table contains two rows of data. In the first row, the 'Service Date' cell (3/1/2024) is highlighted in yellow and has a yellow error icon. In the second row, the 'Service Date' cell (3/1/2024) is also highlighted in yellow and has a yellow error icon. At the bottom right, there are two buttons: 'Download File (.csv)' and 'Submit'.

Subscriber ID	Issue Date	Date of Birth	Service Date	Patient Acct. No.	Subscriber First Name	Subscriber Last Name
90005839S	9/4/2024	4/3/2006	3/1/2024			
90005839S04125	9/4/2024	4/3/2006	3/1/2024			

Figure 4.10: Check Errors.

- When no errors remain, a message appears next to the **Check Errors** button notifying users that all errors were resolved.
- Select **Download File (.csv)** to begin the download of the corrected file or **Submit** to process the corrected file.

The screenshot shows the 'Fix Errors' interface after all errors have been resolved. The 'Check Errors' button is now a dark blue button with a white document icon and the text 'Check Errors'. To the right of the button, a green message says 'All errors resolved! You can now download the corrected file or submit it for processing.' Further right is a toggle switch labeled 'Unresolved (0)'. Below this is the same table as in Figure 4.10, but now all cells are white and there are no error icons. At the bottom right, the 'Download File (.csv)' and 'Submit' buttons are highlighted with a red box.

Subscriber ID	Issue Date	Date of Birth	Service Date	Patient Acct. No.	Subscriber First Name	Subscriber Last Name
90005839S	9/4/2024	4/3/2006	3/1/2024			
90005839S04125	9/4/2024	4/3/2006	3/1/2024			

Figure 4.11: Download and Submit Corrected File.

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7. Once the file has been processed, select **Leave Page**.

Note: Make sure to download the data file. Once **Leave Page** is selected, the data will be permanently deleted and to be able to access it again, the file must be re-uploaded.

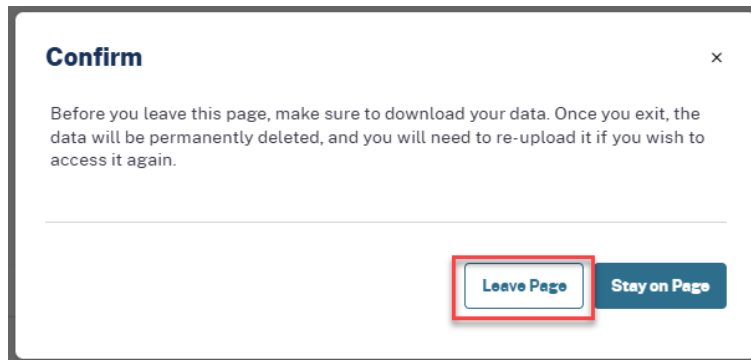


Figure 4.11: Confirm Leaving Page.

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Need Help?

From any screen within the application, users can access the Need Help? drawer.

1. Select the **Need Help?** tab.

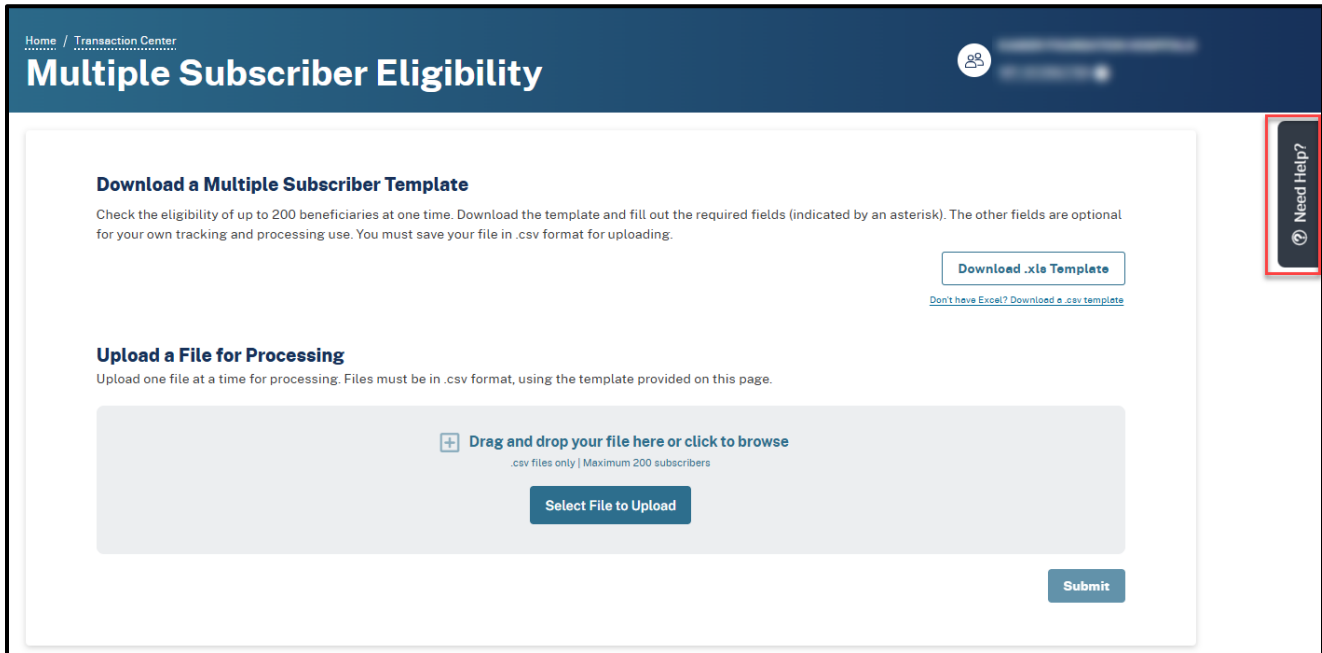


Figure 4.12: Need Help? Tab.

The Need Help? drawer will open and list relevant sources of information needed to assist users with their submissions and responses.

2. Select the **“X” icon** to close the drawer.

Note: A new browser window will open to display the resource.

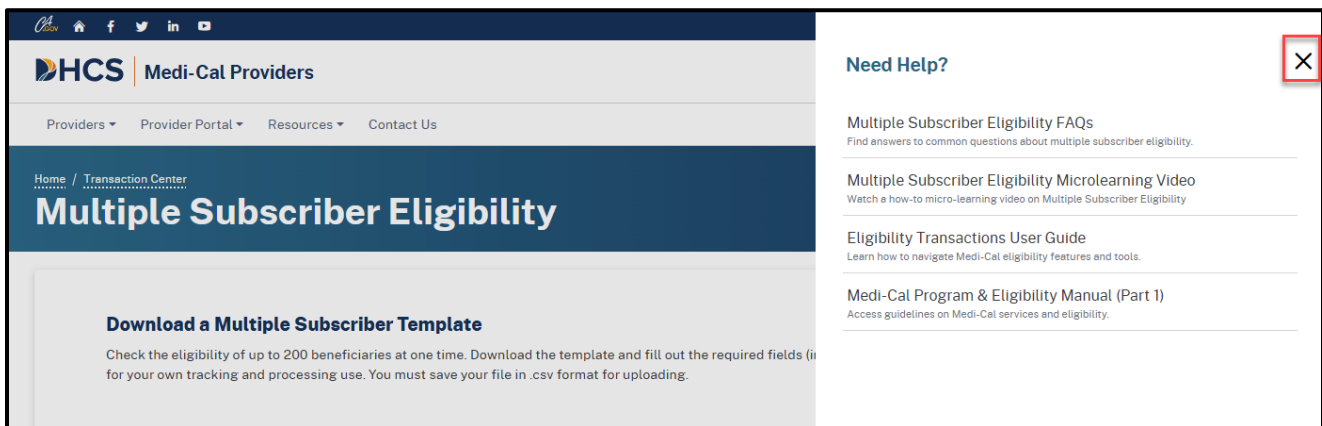


Figure 4.13: Need Help? Drawer.

Change Summary

Version Number	Date	Description	Notes/Comments
1.0	December 2024	Provider Portal	Create new user guide for eligibility transactions
1.1	March 2025	Provider Portal	Added Multiple Subscriber Eligibility Enhancements
1.2	September 2025	Title change	None
1.3	October 2025	User Guide Template update.	Removed "Page Updated: Month Year" on each page. Changed CA-MMIS to California Medicaid Management Information System.
1.4	November 2025	Update screen shots.	None