State of California
Department of Health Care Services

Provider Portal: Eligibility Transactions User Guide

California Medicaid Management Information System

V 1.4

November 2025

Table of Contents

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.

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.

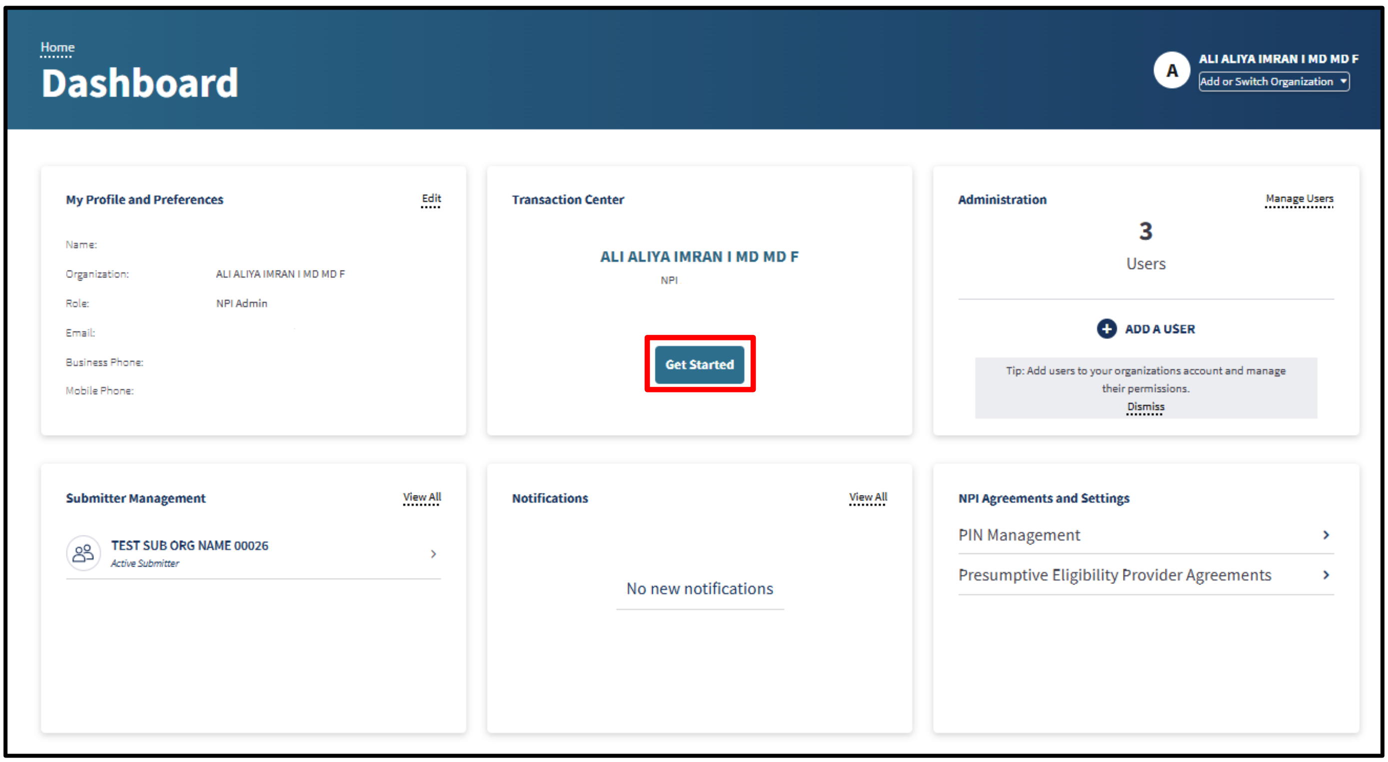

Figure 1.1: Transaction Center Tile of the Provider Portal Dashboard.

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

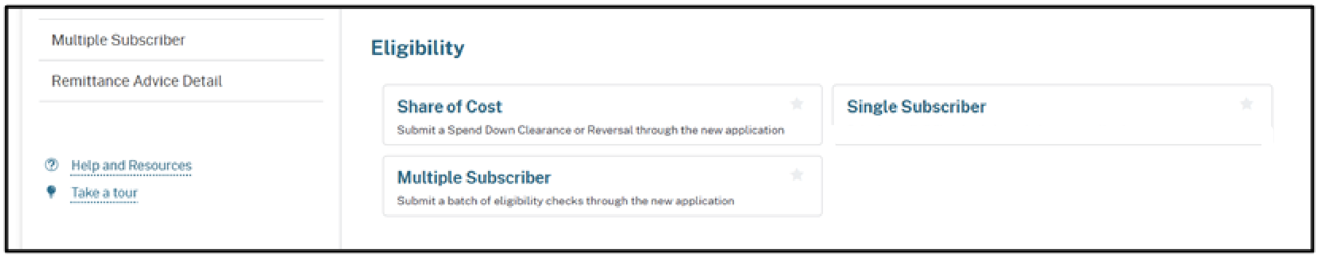

Figure 1.2: Eligibility Transactions in the Transaction Center.

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.

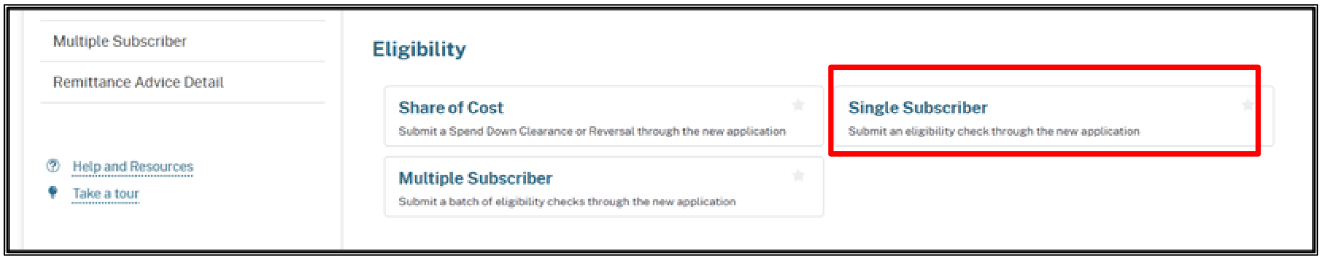

Figure 2.1: Single Subscriber Link in the Eligibility Section.

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

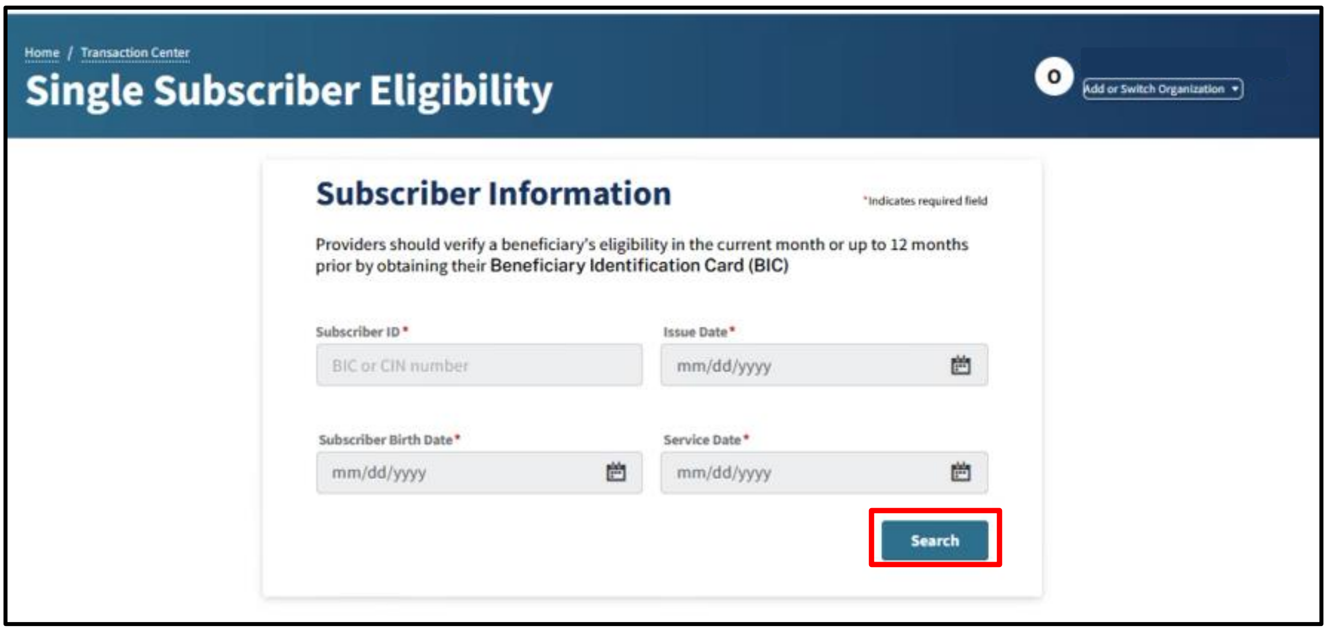

Figure 2.2: Subscriber Information.

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.

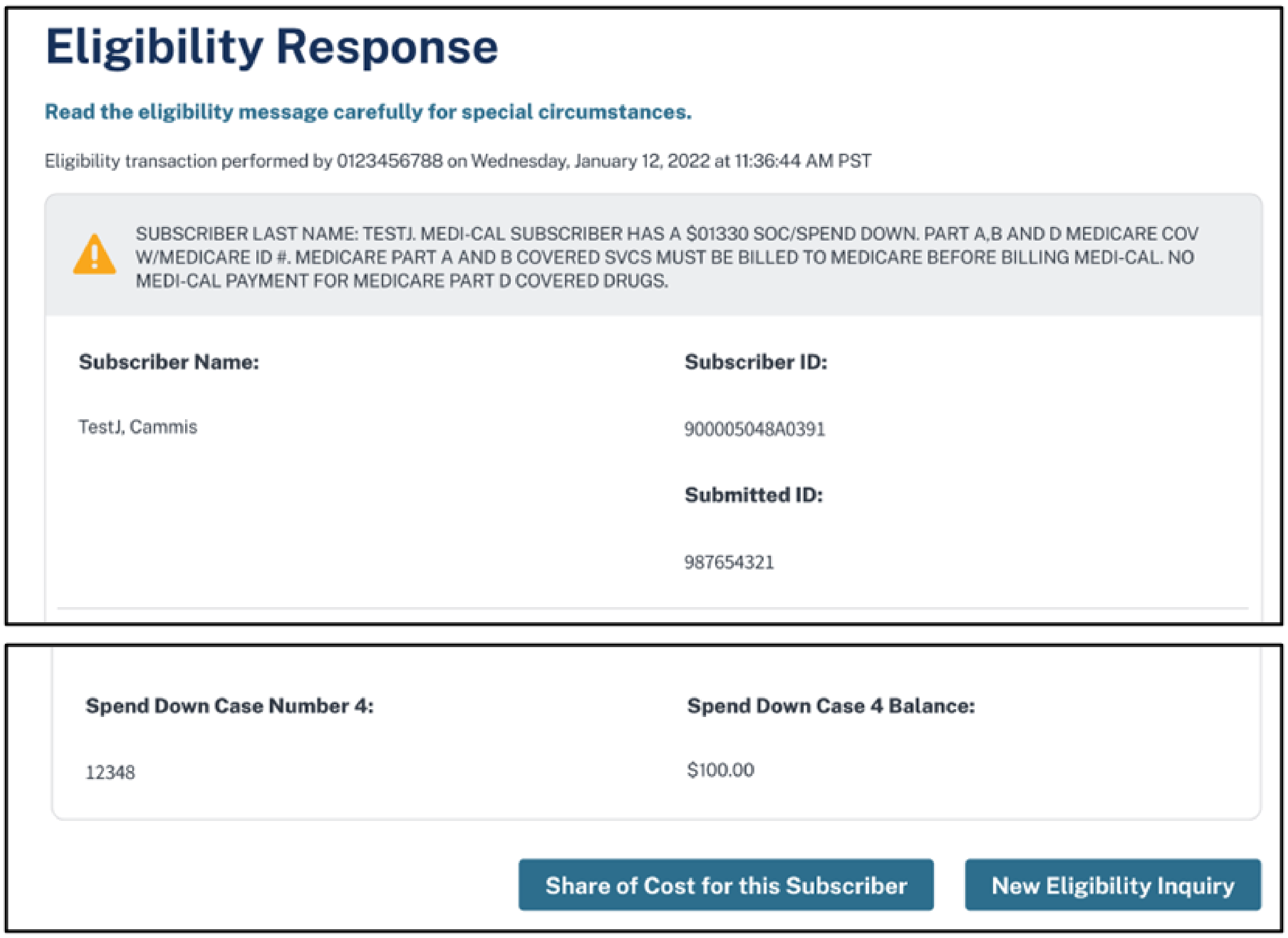

Figure 2.3: Single Subscriber Eligibility Response Summary.

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.

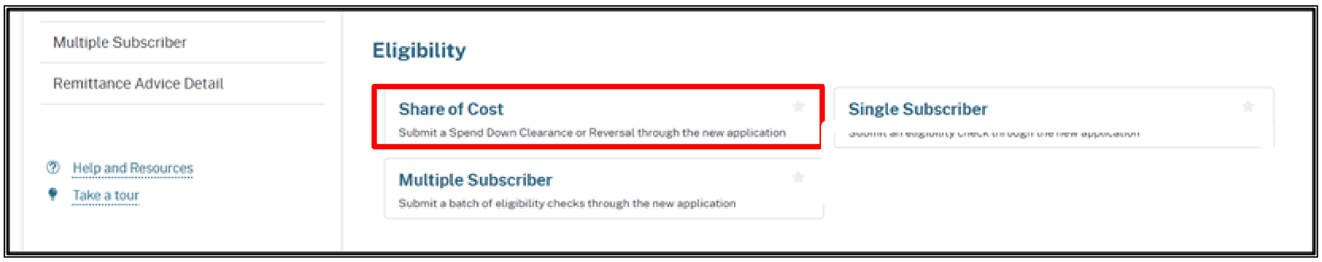

Figure 3.1: Share of Cost link in the Eligibility section.

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**.

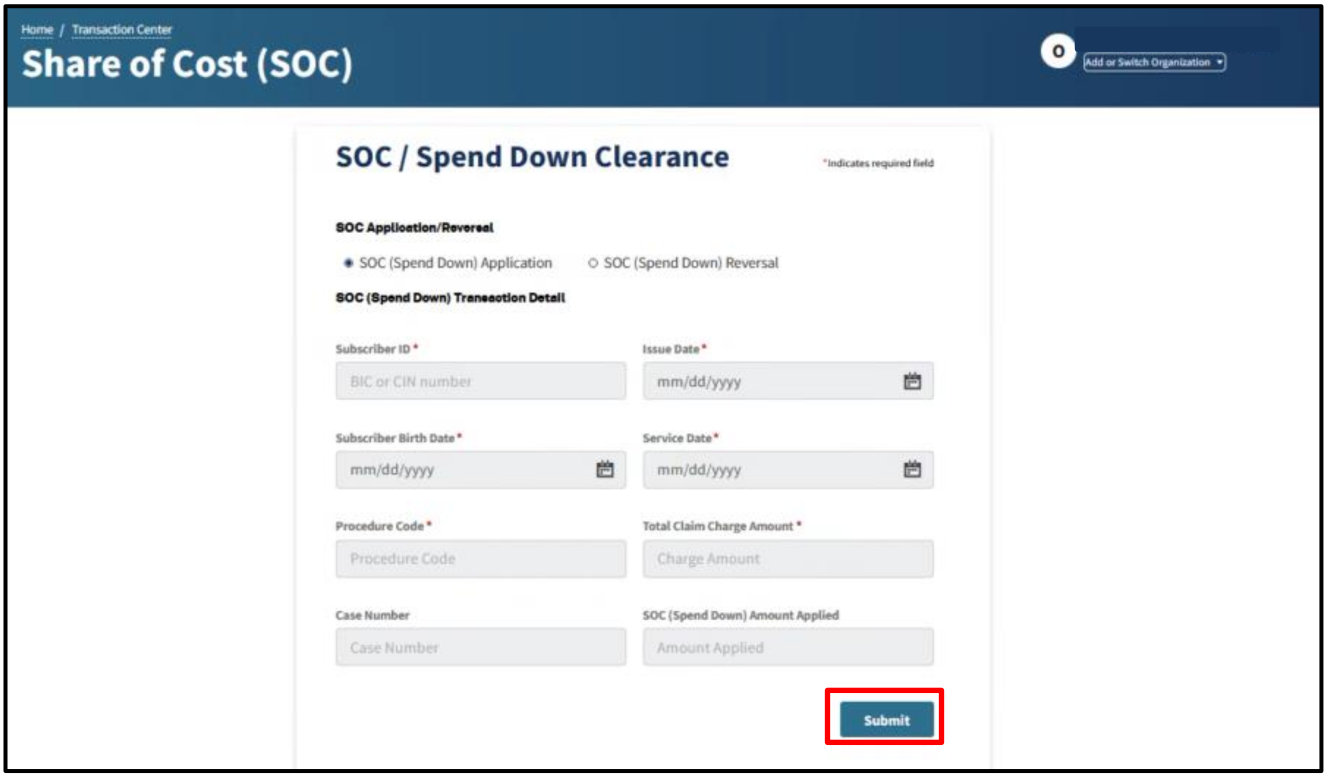

Figure 3.2: SOC/ Spend Down Clearance.

3. 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.

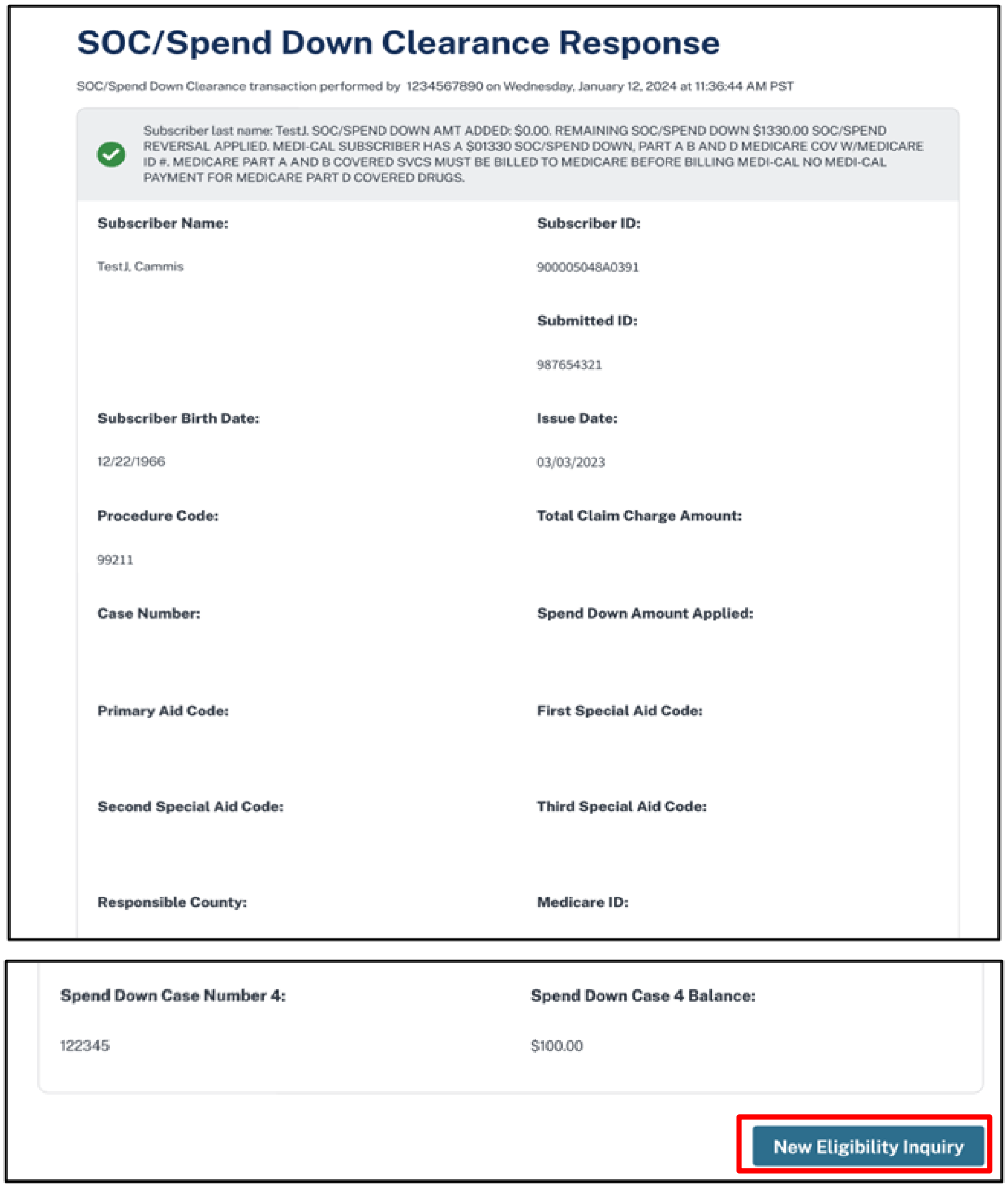

Figure 3.3: SOC/Spend Down Clearance Response Summary.

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.

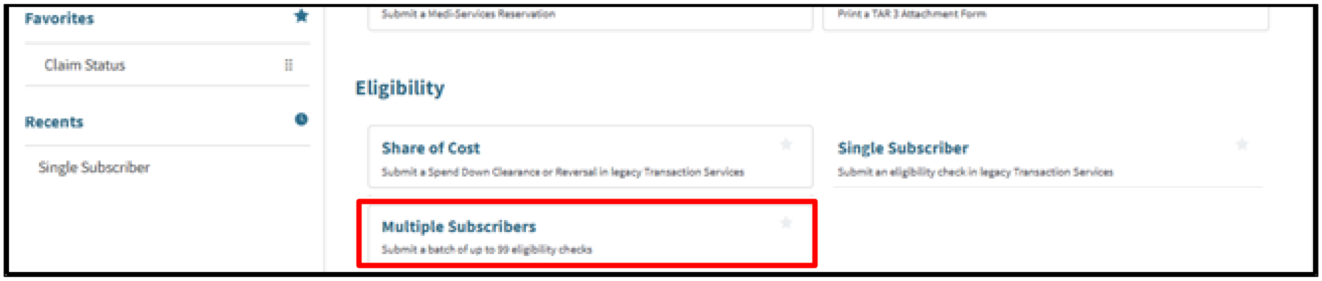

Figure 4.1: Multiple Subscriber Eligibility Link in the Eligibility Section.

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**.

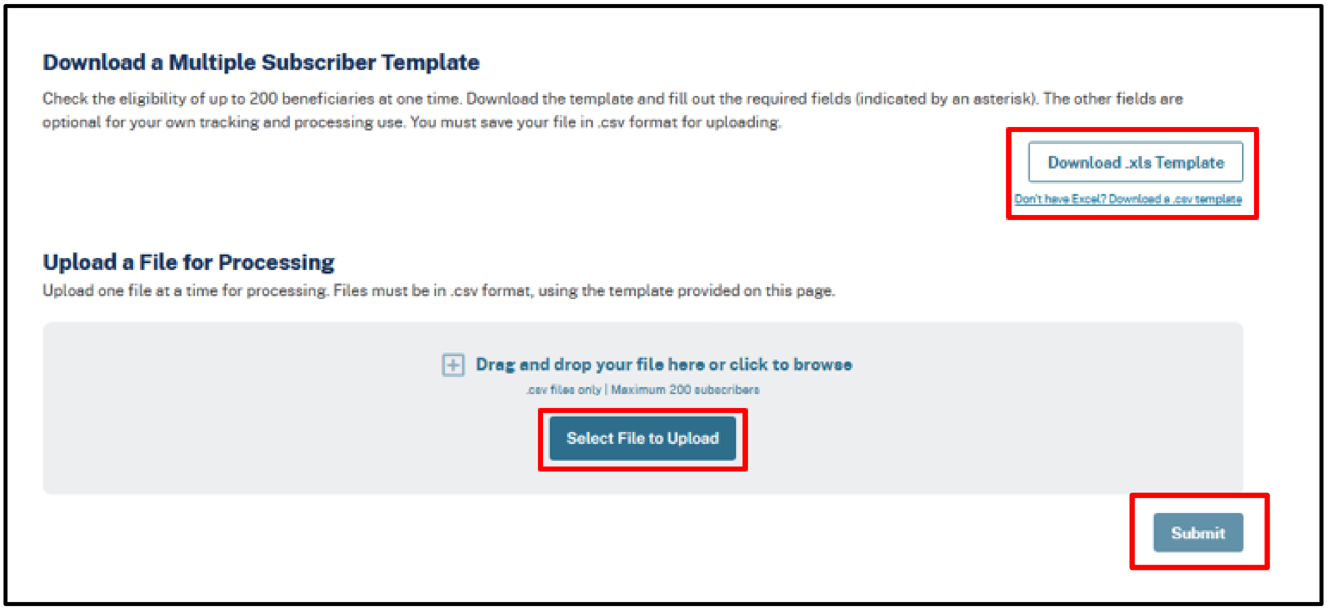

Figure 4.2: Download a Template or Upload a File.

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.

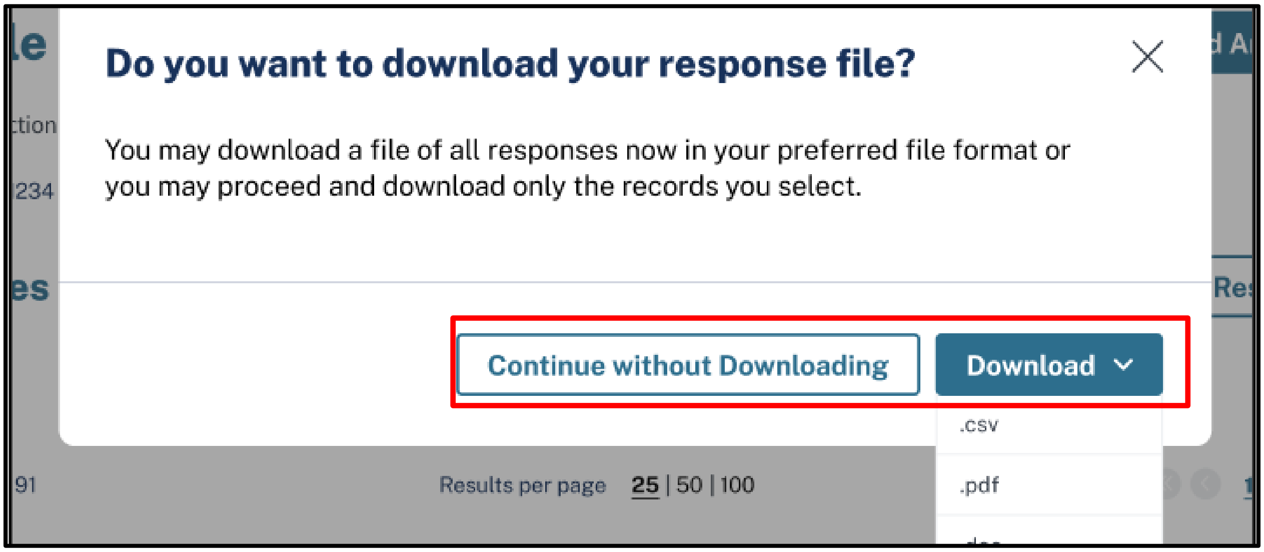

Figure 4.3: Download the Response File.

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

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.

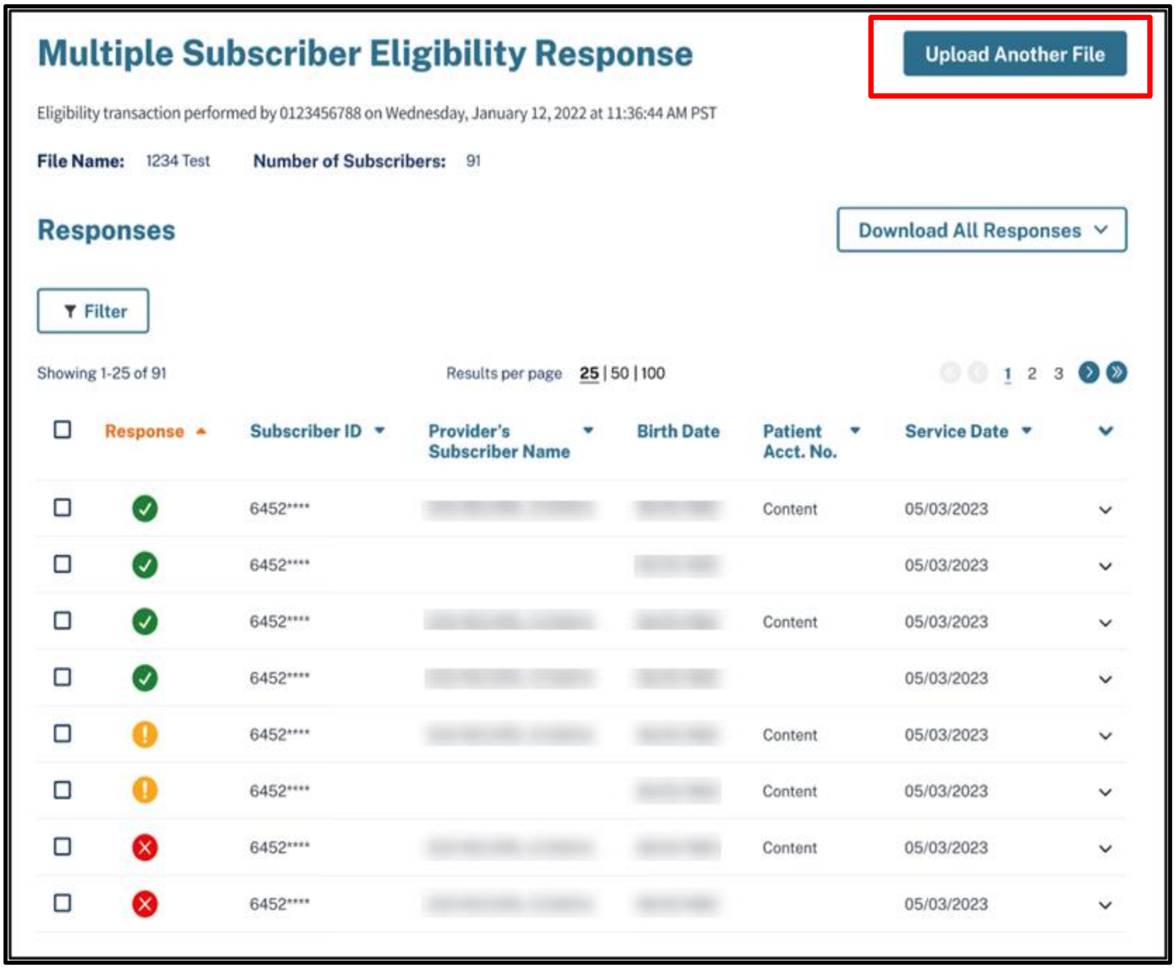

Figure 4.4: List of Responses.

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.

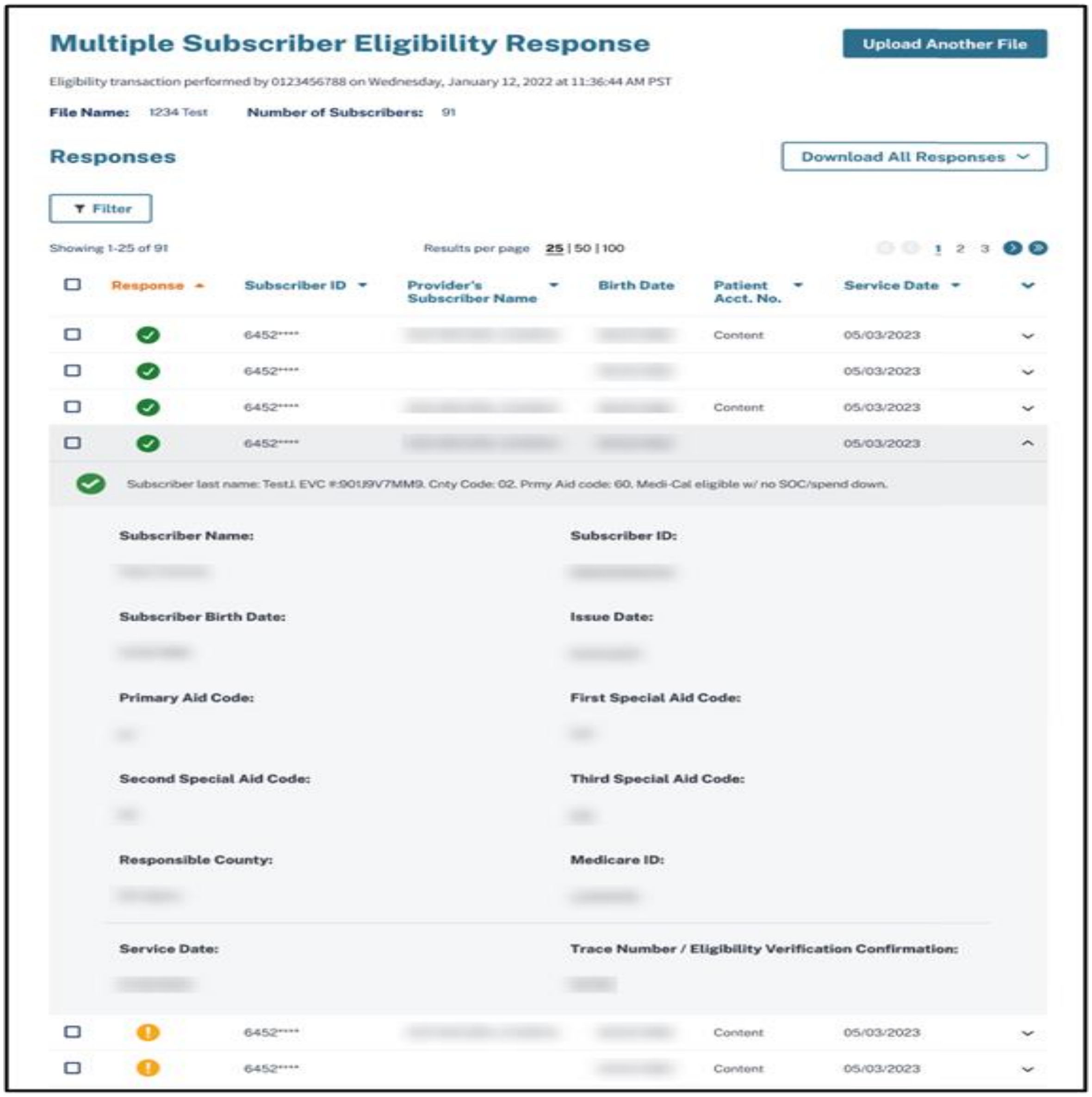

Figure 4.5: Multiple Subscriber Eligibility Response Summary.

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

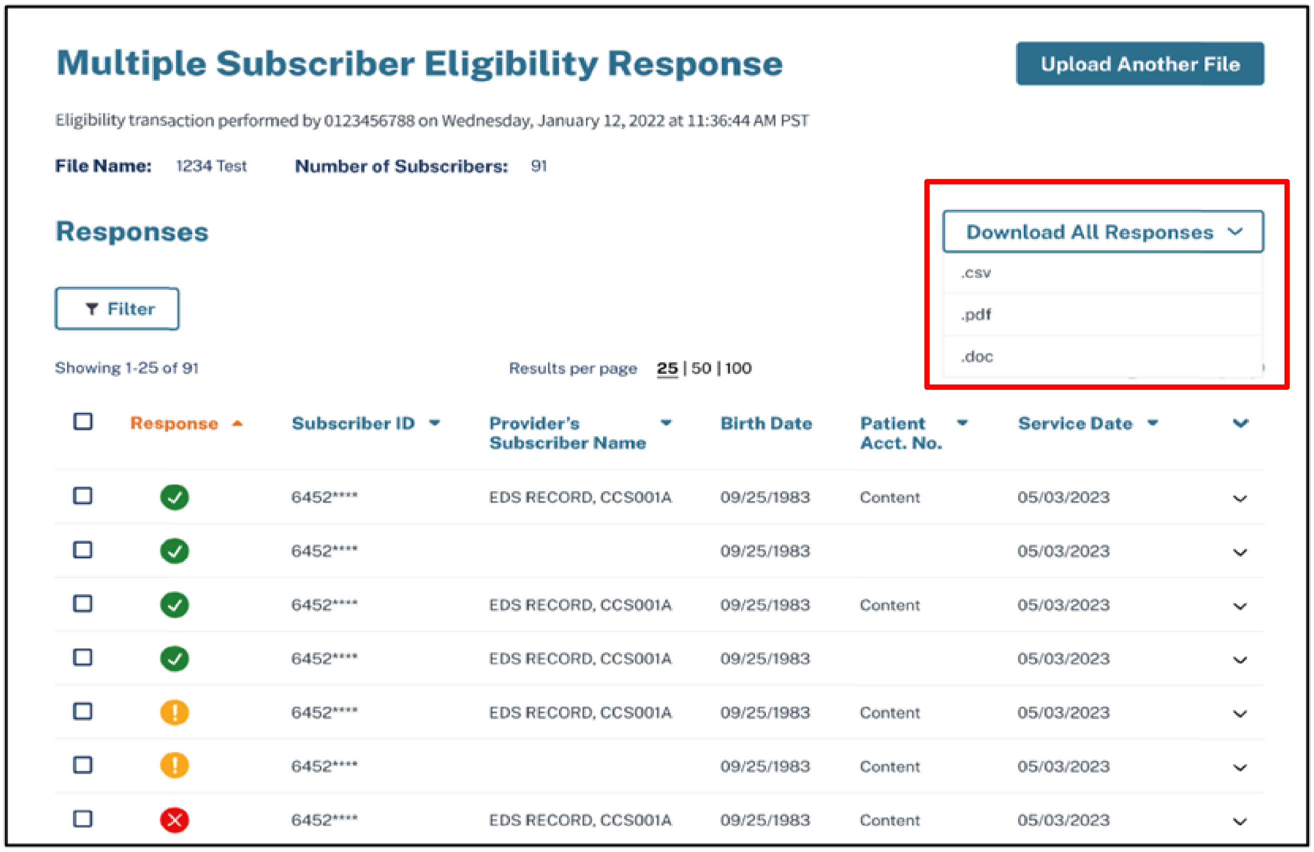

Figure 4.6: Download All Responses Format Selector.

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.

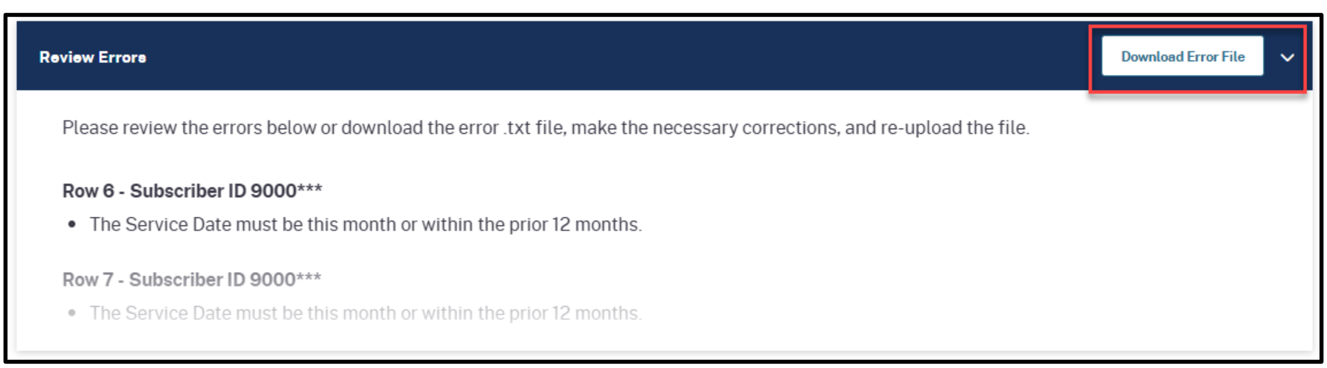

Figure 4.7: Review Errors.

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.

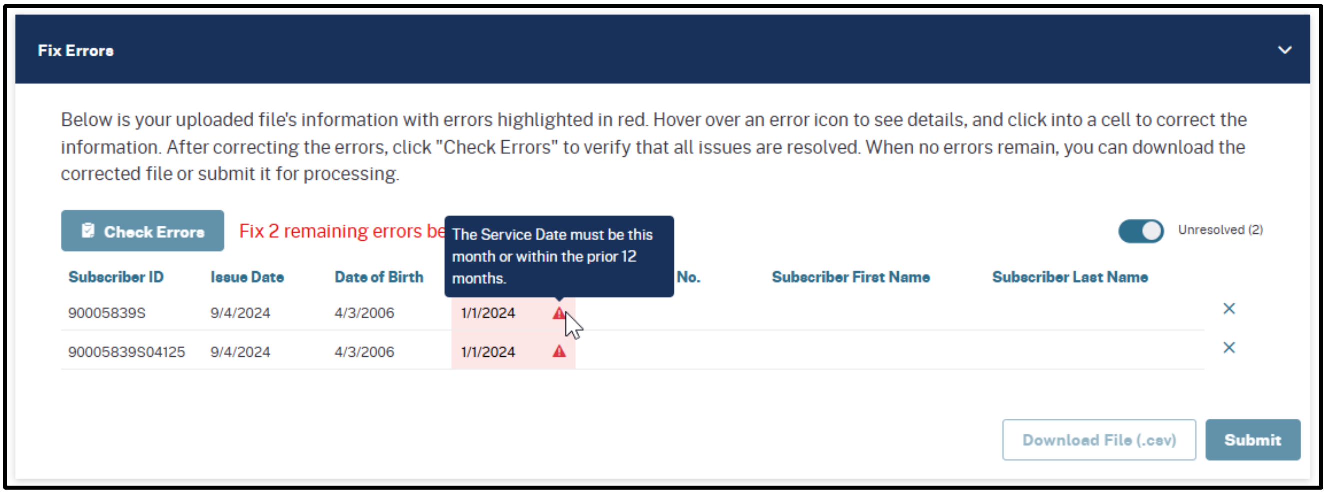

Figure 4.8: Error Tooltip.

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

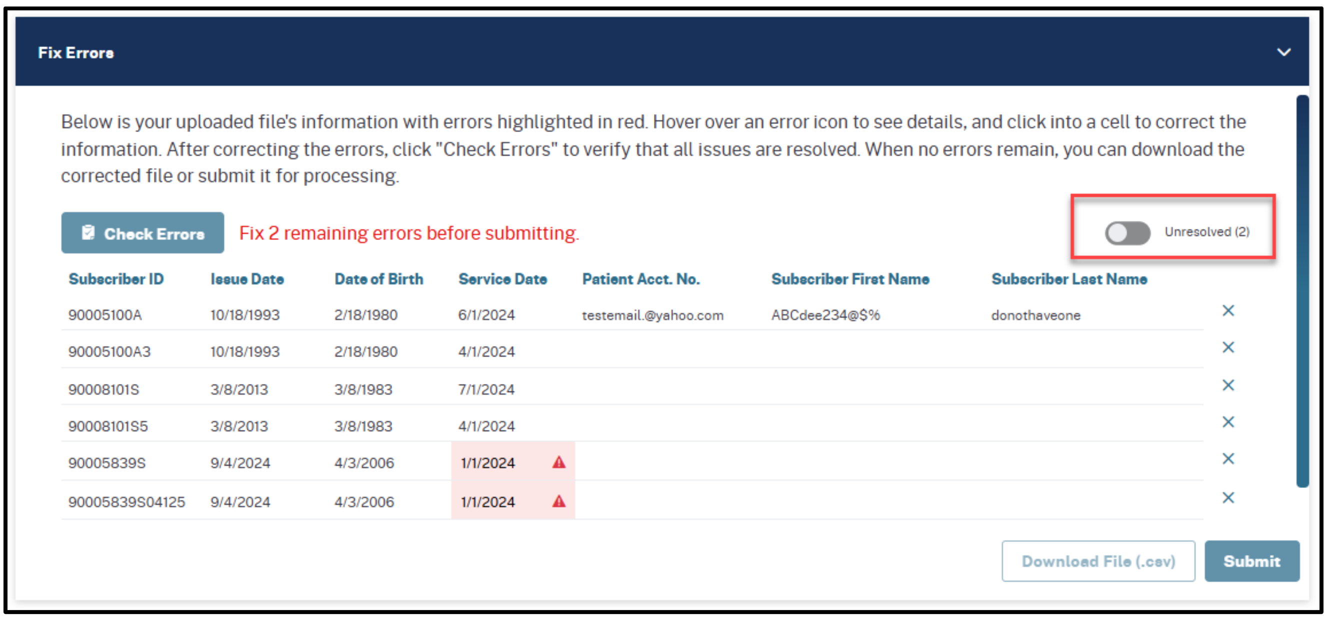

Figure 4.9: Multiple Subscriber Eligibility Response Summary.

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

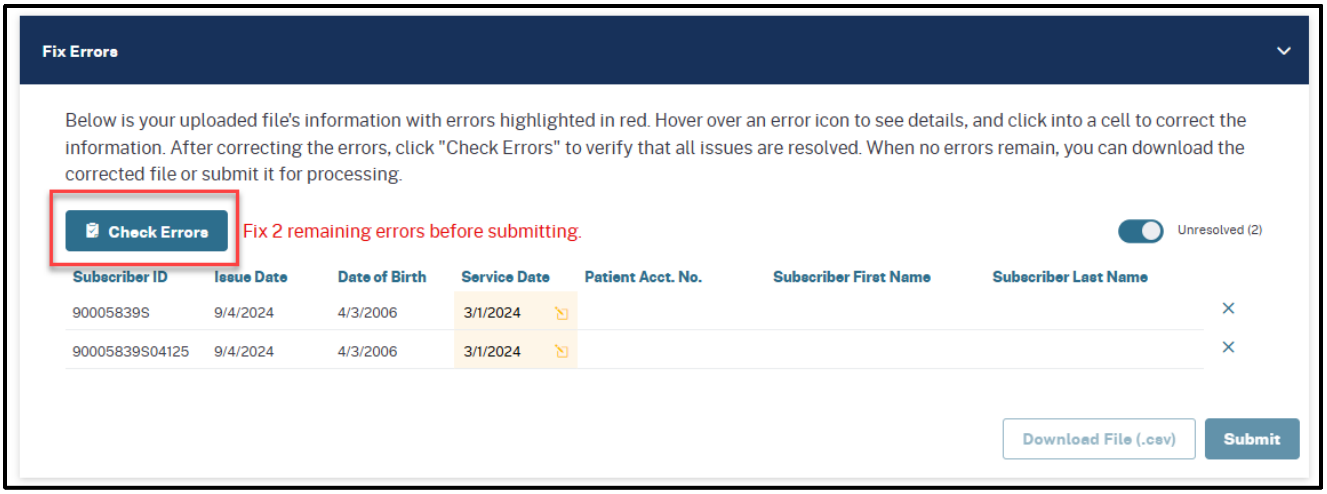

Figure 4.10: Check Errors.

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

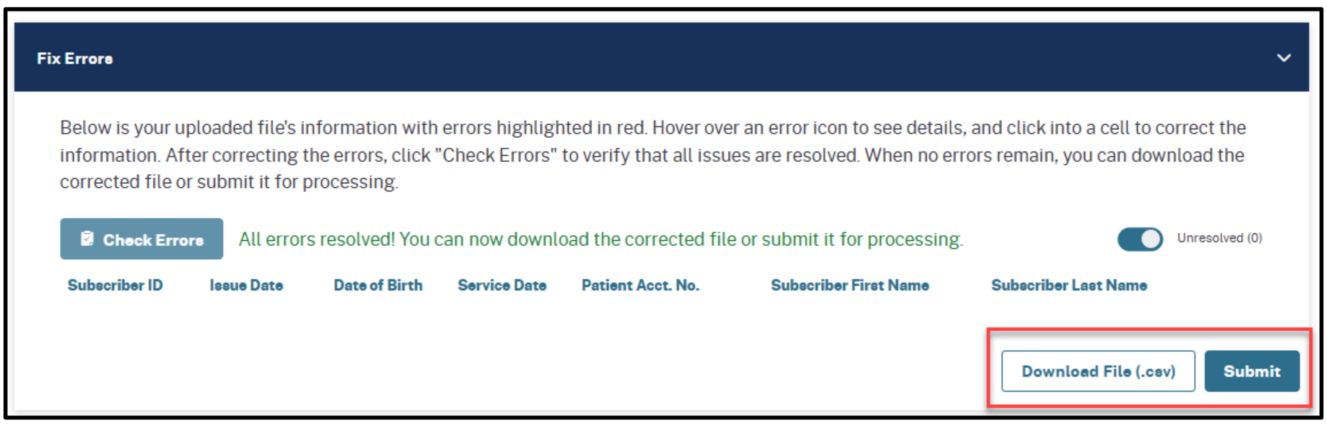

Figure 4.11: Download and Submit Corrected File.

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.

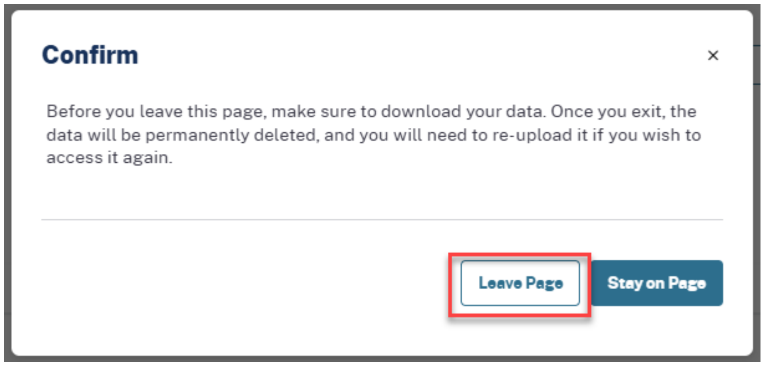

Figure 4.11: Confirm Leaving Page.

Need Help?

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

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

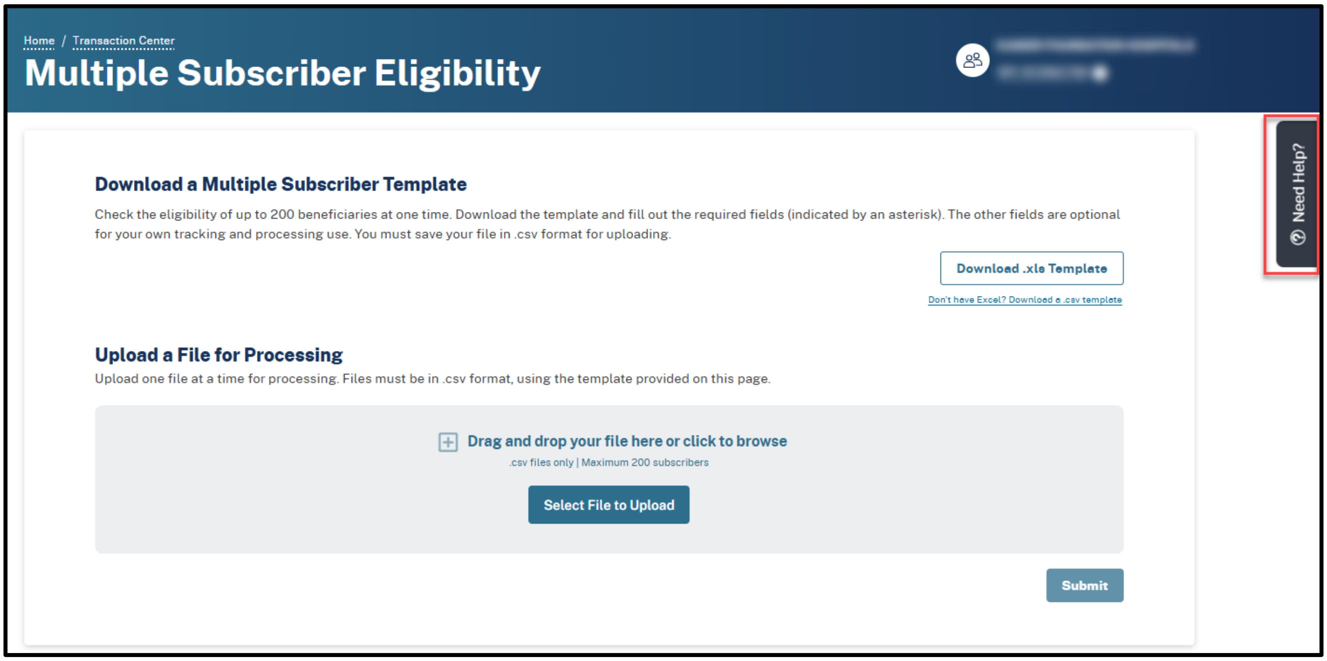

Figure 4.12: Need Help? Tab.

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.

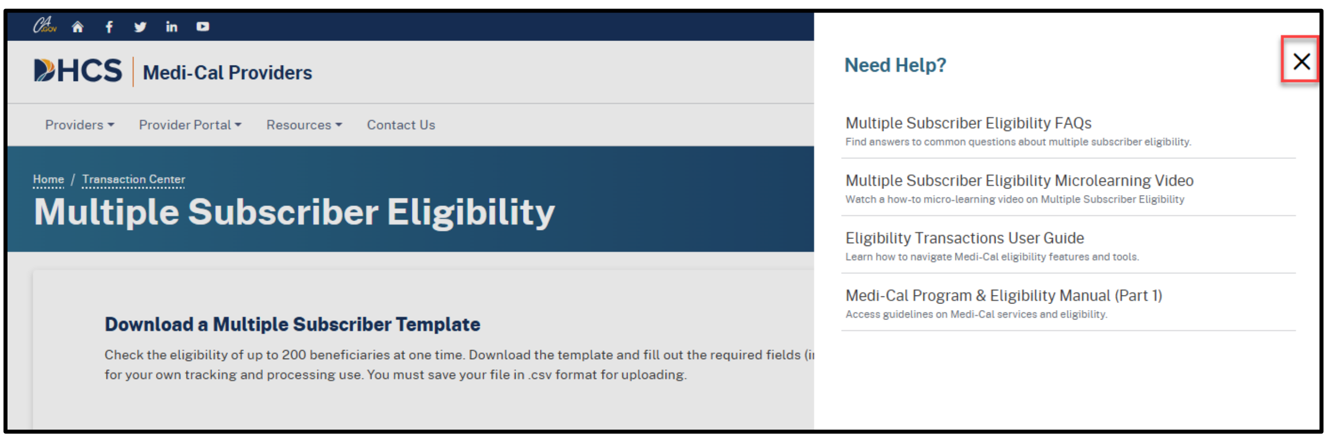

Figure 4.13: Need Help? Drawer.

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