

Coreo

How to View Patient Demographics



HMSA, an Independent Licensee of the Blue Cross and Blue Shield Association

Patient Demographics

The patient Demographics is accessible through Coreo providing an at a glance view into your patient's Demographics. More specifically:

- DOB
- Medical ID #
- Gender
- Race
- Marital Status
- Contact Information
- Automation Preferences
- Attributed Physician
- Insurance Carrier
- Other: Employer Details

Logging into Coreo

1. Navigate to <https://www.coreohealth.com/Account/Login>
2. Type in the e-mail address associated with your Coreo account and password
3. Click 'Sign In'

The screenshot shows the Coreo login interface. A vertical bar on the left side of the form contains three numbered circles: 1, 2, and 3. Circle 1 points to the 'COREO' logo at the top of the page. Circle 2 points to the 'Email Address' input field. Circle 3 points to the 'Sign In' button at the bottom of the form.

COREO

Sign In
Email Address

Email Address

Password

Password

Remember Me [Forgot Password?](#)

Sign In

Powered by Lightbeam Health Solutions, Inc.

Navigating to Patient Demographics

1. Upon logging into Coreo, and navigating to the 'Dental Patient's Registry, click on a patient name to access the Patient Demographics.

The screenshot shows the COREO Panel Management interface. The left sidebar contains navigation options: 'Dvoroznak, Stephanie' (61), 'Resource Center', and 'Panel Management'. The main content area is titled 'Panel Management' and 'Dental Patients Registry'. Below the title is an 'Add Provider' button and a search bar. A table lists patient records with columns: Patient Name, DOB, Gender, Member Id, Contract, Care Gaps, Status, Provider, and Last Visit. The first row is highlighted, and a blue circle with the number '1' is placed over the patient name. At the bottom left, there is a 'Minimize' button. At the bottom right, it says 'Showing all 542 rows'.

Patient Name	DOB	Gender	Member Id	Contract	Care Gaps	Status	Provider	Last Visit
[Patient Name]	2/9/1929	Male	[Member Id]	Commercial PPO	6		[Provider]	4/27/2020
[Patient Name]	7/8/1940	Male	[Member Id]	Commercial PPO	8		[Provider]	3/9/2020
[Patient Name]	2/2/1942	Female	[Member Id]	Commercial PPO	6		[Provider]	2/3/2020
[Patient Name]	1/11/1960	Female	[Member Id]	Commercial PPO	13		[Provider]	3/7/2020
[Patient Name]	8/8/1959	Female	[Member Id]	Commercial PPO	23		[Provider]	6/12/2020
[Patient Name]	4/28/1956	Male	[Member Id]	Commercial PPO	16		[Provider]	6/12/2020
[Patient Name]	10/19/1956	Male	[Member Id]	Commercial PPO	10		[Provider]	5/28/2020
[Patient Name]	12/16/1944	Male	[Member Id]	Commercial PPO	4		[Provider]	5/27/2020
[Patient Name]	1/2/2008	Female	[Member Id]	Commercial PPO	2		[Provider]	5/30/2017
[Patient Name]	2/21/2006	Female	[Member Id]	Commercial PPO	7		[Provider]	6/5/2020
[Patient Name]	8/26/1984	Female	[Member Id]	Commercial PPO	8		[Provider]	4/6/2020

Navigating to Patient Demographics

2. After clicking a patient's name, you will be taken to the patient's Care Gap tab. To view the Patient Demographics, click the drop down arrow to the right of Demographics.

The screenshot shows a patient care interface for a 91-year-old male patient. The top navigation bar includes '<< PREV', 'HMSA (91 years)', 'NEXT >>', 'Notes', and 'Close >>'. Below this, patient details like 'Male' and 'DOB:2/9/1929' are visible. A secondary bar shows 'Active (WithClaims)', 'Commercial PPO', 'Care Gaps: 6', 'ERG Risk Score : 3.080', 'ATI : 3.960', and an 'Attach' button. A third bar contains 'Demographics', 'Contact', 'Automation', 'Physician', 'Contract / Insurance', and 'Other', with a '+ Expand' button. The 'Demographics' dropdown is highlighted with a blue circle containing the number '2'. Below this are tabs for 'CASES', 'NOTES', 'FACE SHEET', 'CLINICAL', 'RISK PROFILE', and 'CARE GAPS'. The 'CARE GAPS' tab is active, showing a 'Program Year' dropdown set to '2020', an 'Enter Exclusion' button, a 'Change Status To' dropdown set to 'Select', and a 'Save' button. A table below lists care opportunities with columns for 'Type', 'Care Opportunities', 'Actions', 'Created', 'Status', and 'R4R Status'. The first row shows 'HMSA PTM Measure Program 2020' with the opportunity 'Influenza Vaccine (Adult) (Display Only)' created on 4/10/2020 with a status of 'New'.

Viewing Patient Demographics

3. After clicking the arrow, the demographics will populate.

4. For a larger view, click on +Expand to view the additional demographic information specific to your patient.

The screenshot shows a patient record interface for a 91-year-old male. The top navigation bar includes '<< PREV', 'WILSON, AB (91 years)', 'NEXT >>', 'Notes', and 'Close >>'. Below this, patient details are displayed: 'Male', 'DOB: 2/9/1929', and 'ID: [REDACTED]'. A secondary bar shows 'Active (WithClaims)', 'Commercial PPO', 'Care Gaps: 6', 'ERG Risk Score : 3.080', 'ATI : 3.960', 'Attach', and 'Time Spent: 0 Min'. A dropdown menu is open under 'Demographics', showing fields: 'DOB: 2/9/1929', 'Patient # : [REDACTED]', 'Gender: Male', 'Race : Unknown', and 'Marital Status: Married'. A '+ Expand' button is highlighted in the top right. Below the menu, there are tabs for 'NOTES', 'FACE SHEET', 'CLINICAL', 'RISK PROFILE', and 'CARE GAPS'. A 'Change Status To' dropdown is set to 'Select', with an 'Enter Exclusion' button and a 'Save' button. A table of 'Care Opportunities' is visible, with one row: 'ram 2020', 'Influenza Vaccine (Adult) (Display Only)', '4/10/2020', 'New', and 'R4R Status'. The bottom of the screen shows 'Showing all 1 rows'.

Questions?

For any questions related to this training please contact Dental Network Managers Jessica Chang at 538-8904 or Jessica.Chang@BSHI.NET, or Ellie Kelley Miyahisro at 538-8996 or Ellie.Kelley-Miyashiro@BSHI.NET

Mahalo!