RelayHealth

EDI Implementation Checklist – Lytec

	Action	Resources
Step 1: Sign Contract		
☐	Call your Value Added Reseller or call us direct at (1-800-333-4747) to obtain a Processing Services Agreement (aka user contract) and Client Registration Form (CRF).	Direct Sales Team Territories Value Added Resellers
☐	Fill out and sign the Processing Services Agreement (aka end user contract).	Direct Sales Team Territories Value Added Resellers
☐	Fill out and sign the Client Registration Form.	Direct Sales Team Territories Value Added Resellers
☐	Fax the Processing Services Agreement and Client Registration Form to (678) 302-4366.	Direct Sales Team Territories Value Added Resellers
Step 2: Set Up Collaboration Compass		
☐	Receive email from the RelayHealth Enrollment Team (enrollrelay@mckesson.com); e-mail will contain your RelayHealth EDI Welcome Packet and the Submitter ID that you will use with Collaboration Compass and to submit claims.	enrollrelay@mckesson.com
☐	Set up log-in and password for anyone the office who will be using Collaboration Compass.	Collaboration Compass User Guide; Collaboration Compass User Name and Password Instructions; Collaboration Compass Documentation
☐	To set up Collaboration Compass log-in and password, go to the site at http://www.collaborationcompass.com, click “register” and use the Submitter ID assigned to you by enrollment.	Collaboration Compass User Guide; Collaboration Compass User Name and Password Instructions; Collaboration Compass Documentation
☐	Receive confirmation e-mail within 24 hours from RelayHealth indicating that your user account has been activated. If you do not receive this e-mail, first check your junk mail folder. If still don’t have the confirmation e-mail, contact enrollrelay@mckesson.com.	enrollrelay@mckesson.com

Step 3: Enroll Payors		
☐	Once your account is activated, log into Collaboration Compass at http://www.collaborationcompass.com/.	enrollrelay@mckesson.com
☐	Assess which payors you plan to bill electronically	
☐	Access the Payor Agreement Library through the Payor Connections link on Collaboration Compass to find out which payors require an agreement to submit electronic claims	RelayHealth Payor Agreements; Using the Payor Agreements Library Documentation
☐	If none of your payors require agreements, skip to Step 4 (Set Up Software). If one or more payors require agreement, go to the Payor Agreement Library.	RelayHealth Payor Agreements; Using the Payor Agreements Library Documentation
☐	Complete the necessary payor paperwork. Complete Claims agreements first. Remittance and Eligibility agreements should be completed after the Claims agreement has been submitted and approved.	RelayHealth Payor Agreements; Using the Payor Agreements Library Documentation
☐	Submit payor paperwork as instructed in Payor Agreement Library.	RelayHealth Payor Agreements; Using the Payor Agreements Library Documentation
☐	Follow up on agreement status by clicking on “Search Agreements” in the Payor Agreement Library.	RelayHealth Payor Agreements; Using the Payor Agreements Library Documentation
☐	Receive approval to submit claims electronically.	RelayHealth Payor Agreements; Using the Payor Agreements Library Documentation
Step 4: Set Up Software		
☐	Download the RelayHealth EDI module from the Lytec Knowledge Base.	Lytec 2007 – 132167 Lytec 2008 – 132168
☐	Install the EDI module per the guidelines provided in the installation manual.	Installation manual provided in the KB article; Setting up Lytec for RelayHealth Documentation
☐	Repeat EDI module installation on all PCs from which electronic claims will be submitted.	Installation manual provided in the KB article; Setting up Lytec for RelayHealth Documentation
☐	Set up your RelayHealth EDI receiver following the instructions in the installation manual.	Installation manual provided in the KB article; Setting up Lytec for RelayHealth Documentation
☐	Set up Lytec Insurance Carriers/Companies with CPIDs from Collaboration Compass payor lists or payor search.	Installation manual provided in the KB article; Setting up Lytec for RelayHealth Documentation
☐	Repeat insurance carrier setup for each insurance carrier that you intend to send electronic claims to.	Installation manual provided in the KB article; Setting up Lytec for RelayHealth Documentation

Step 5: Transmit Claims/Receive Reports		
☐	Transmit your claims from Lytec.	Processing Electronic Claims in Lytec Documentation
☐	Receive reports from RelayHealth.	Receiving Reports Documentation
☐	Review 997 Report to determine if file was accepted at RelayHealth. If the file was not accepted, you will need to retransmit your claims. Report normally received same day.	How to Read 997 Reports; RelayHealth Reports Document
☐	Review RelayHealth Level 2 rejection report. If claims were rejected, correct rejections and retransmit claims. Report normally received same day.	RelayHealth Reports Document
☐	Review CA Report to determine if all claims passed all edits at RelayHealth and were sent to payor. Report normally received same day.	RelayHealth Reports Document
☐	Review your payor reports. Payor reports typically received 3-7 business days after your transmission.	RelayHealth Reports Document
Step 6: Post ERA Files		
☐	ERA files will automatically be downloaded during claims transmission.	Lytec 2008 Remittance Manual
☐	Access the ERA module in Medisoft	Lytec 2008 Remittance Manual
☐	View the ERA remittance per-verification report to see the data that is included in the ERA file.	Lytec 2008 Remittance Manual
☐	Post ERA file.	Lytec 2008 Remittance Manual
☐	View the ERA remittance post-verification report to verify that payments posted correctly.	Lytec 2008 Remittance Manual