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# Collaboration Compass™ User Guide

June 2007

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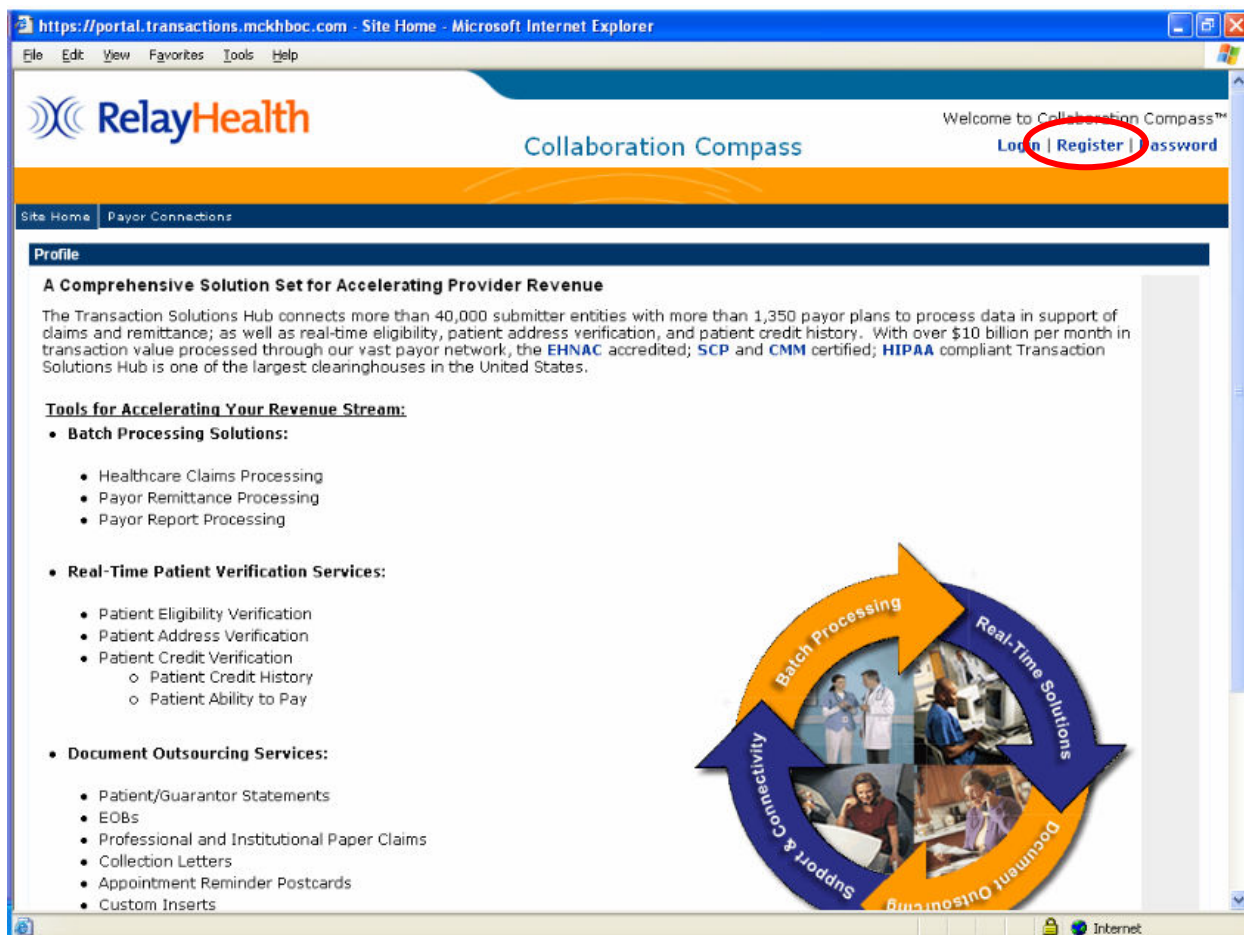
## Introduction

The purpose of this document is to provide instruction to users of Collaboration Compass™ and serve as the user guide.

# 1. Self Registration

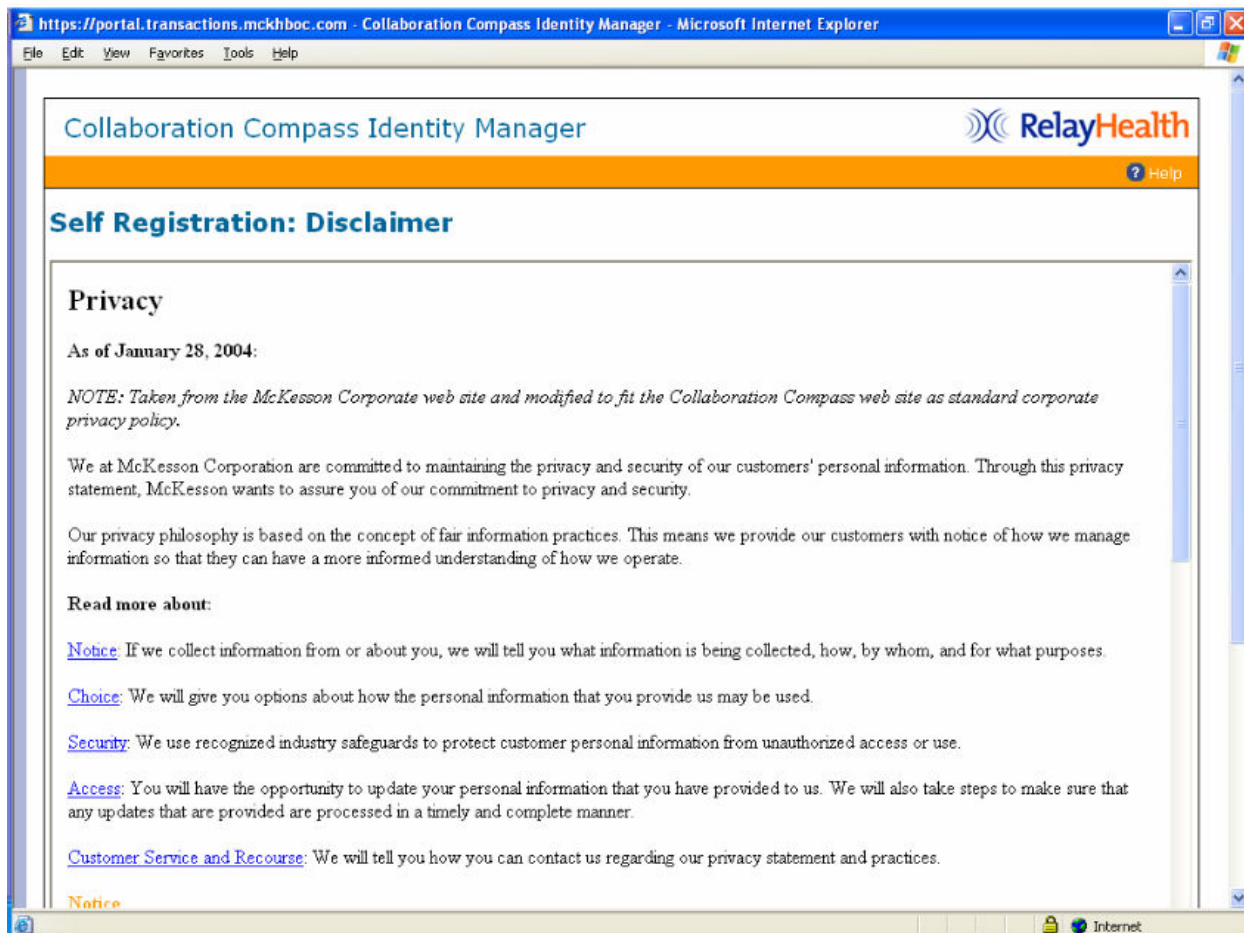
Self-Registration allows new users to register for access to Collaboration Compass™ and corresponding applications.

1. Access Collaboration Compass™ with the following url: <http://collaborationcompass.com>
2. Click *Register*



**Please Note:** Users who do not access their account for 180 consecutive days, may be removed from the system. In order to regain access to the Collaboration Compass™, the user must complete the registration process with a new user ID

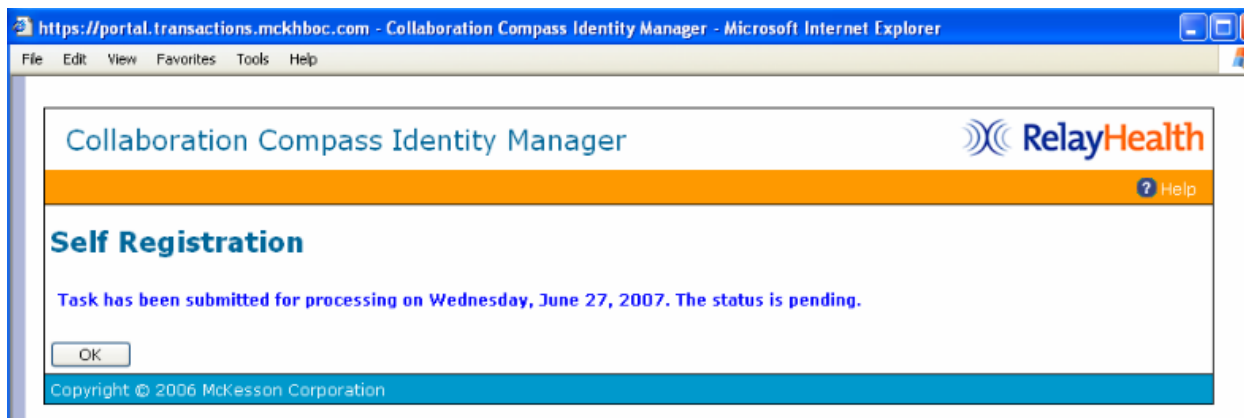
3. Review the disclaimer and click **Accept**, located at the bottom of the page.



4. Enter the required information indicated by the red asterisk, select news subscriptions by holding down the Ctrl key and clicking each subscription needed.
5. Click **Submit**, located at the bottom of the page

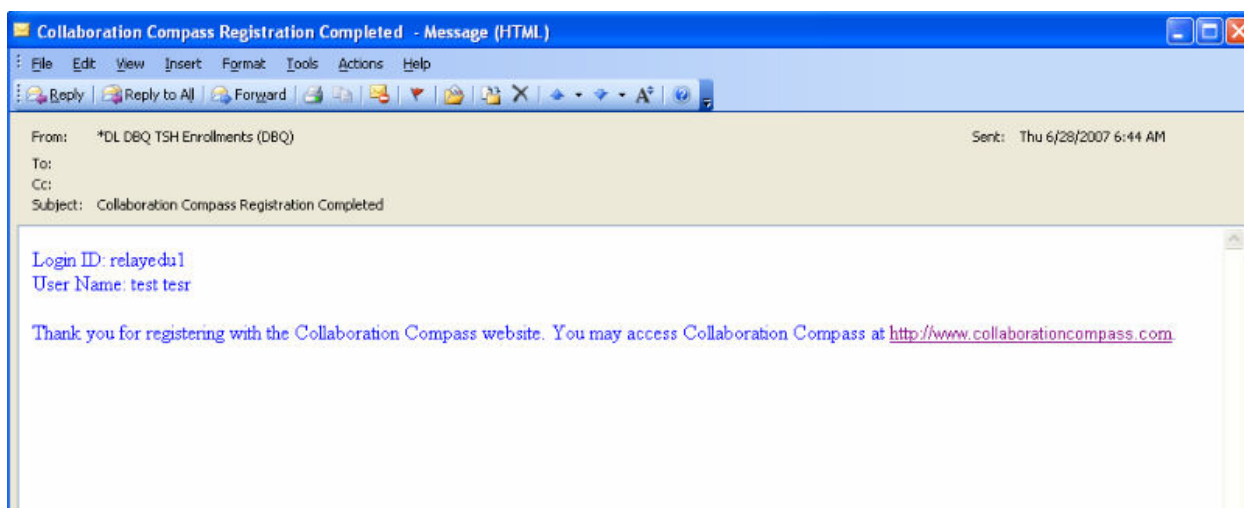
**Please Note:** An invalid submitter ID will delay approval.

6. A confirmation message will display, indicating your registration has been accepted; Click **OK** to return to Identity Manager home page



7. Registration staff will review the user request within 24 hours. Users who are approved will receive an email from the team. Users with invalid Submitter IDs will be contacted for additional information.

Upon receipt of the Collaboration Compass Registration Completed email, users will have access to the Collaboration Compass™ and the RelayHealth Payor Agreement Library




## 2. Forgotten Password

A temporary password can be generated by using the Forgotten Password function.

1. Click *Password*

https://portal.transactions.mckhboc.com - Log into Collaboration Compass - Microsoft Internet Explorer

File Edit View Favorites Tools Help

 Collaboration Compass

Welcome to Collaboration Compass™  
[Login](#) | [Register](#) | [Password](#)

Site Home

### Login

Enter your user ID and password to log into the Collaboration Compass. If you are encountering log in problems and are sure your credentials are correct, please contact the Registrations support staff at: **1-800-527-8133, option 1.**

**Please Note:** The Registrations staff cannot recover your password for you. If you have forgotten your password please go to the [Reset Password](#) page to request a new password. If you are unable to successfully log in after five attempts your user account will be locked. Please contact your Delegated Administrator to have your account unlocked.

User ID:


Password:

© 2006 McKesson Corporation [Privacy Policy](#)

2. Enter the User ID and click OK.

https://portal.transactions.mckhboc.com - Collaboration Compass Identity Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Collaboration Compass Identity Manager 

[? Help](#)

### Forgotten Password: Please enter the following to identify yourself


User ID\*

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3 Answer the password hint and click OK

https://portal.transactions.mckhboc.com - Collaboration Compass Identity Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Collaboration Compass Identity Manager 

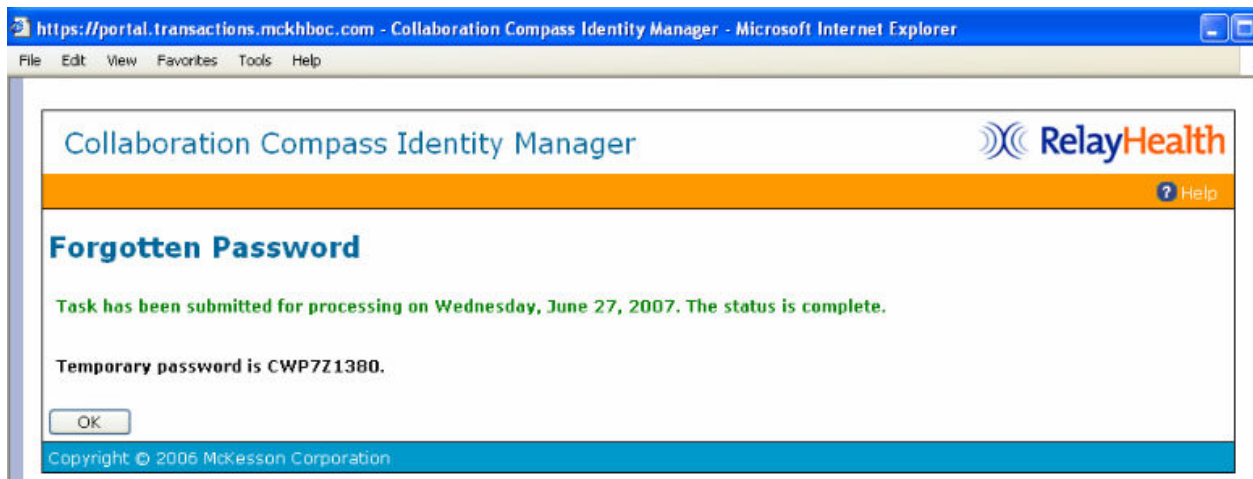
[? Help](#)

### Forgotten Password: Please enter the following to identify yourself

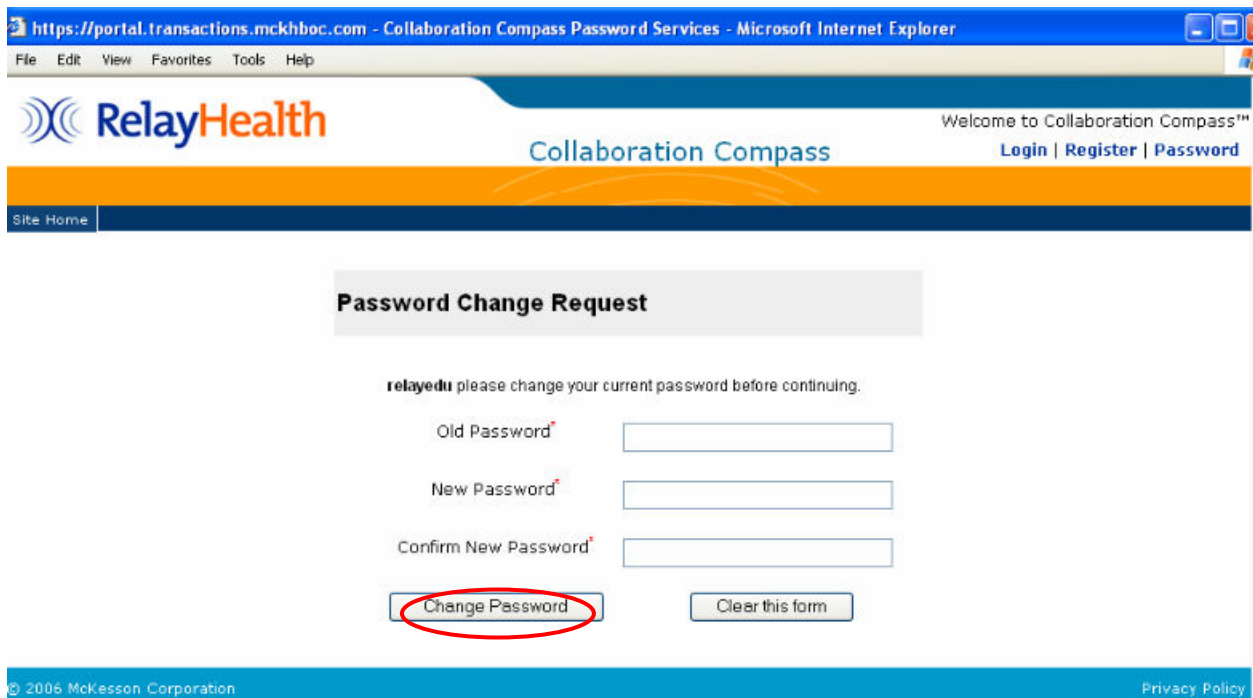
User ID	relayed
First Name	RelayHealth
Last Name	A McKesson Company
Password Hint	color?
Answer*	<input type="text"/>

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3. A temporary password will be displayed, copy (CTRL C) the temporary password; the password will also be emailed to the address in the user profile
4. Click OK to return to the Collaboration Compass™ login screen



5. Use the temporary password to log in; once logged in, the user will be required to change their password
6. After entering the new password, click *Change Password*



7. Click *Continue* on the next screen.

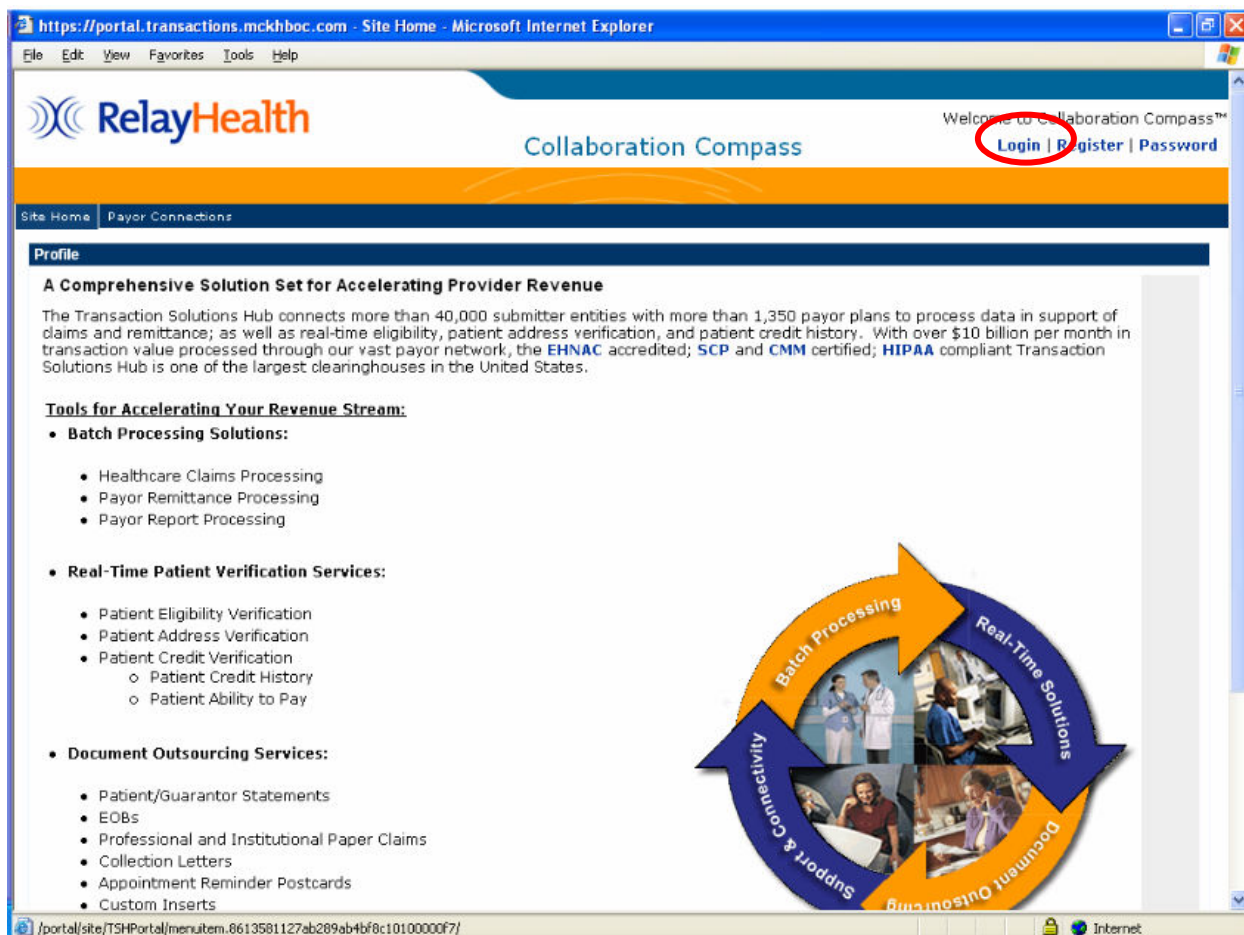
### 3. Accessing Identity Manager

To access Identity Manager users will need to be logged into Collaboration Compass™. Access within Identity Manager is based on the roles assigned within each user's profile.

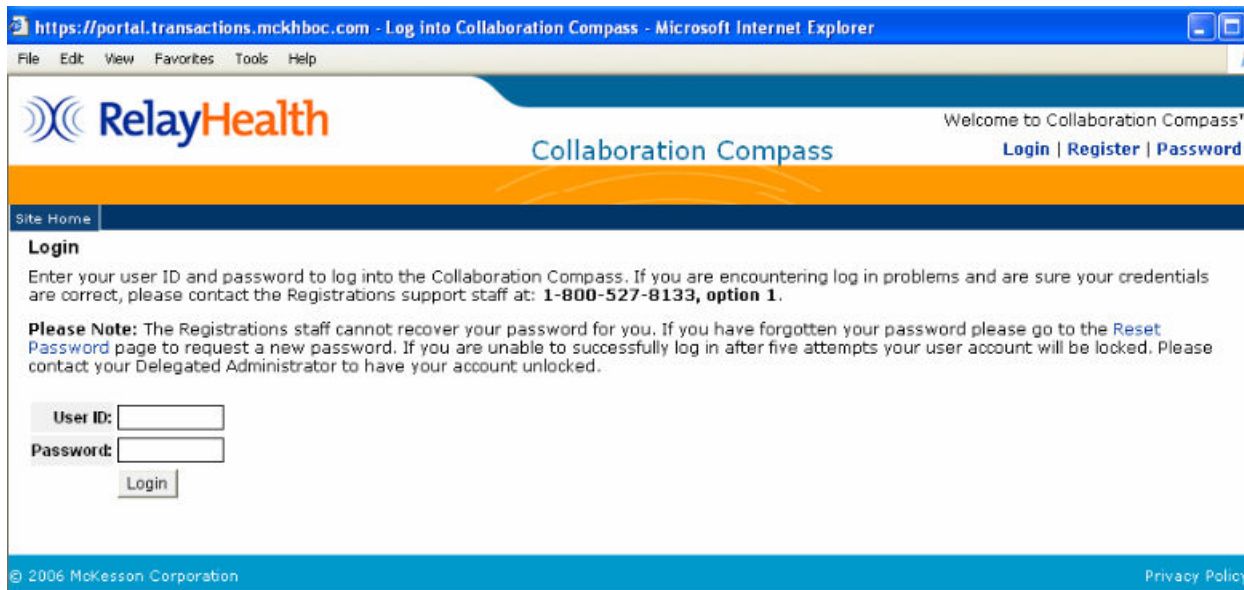
1. Access Collaboration Compass™ with the following url: <http://collaborationcompass.com>



2. Login to Collaboration Compass™ by clicking *Login*



3. Enter the appropriate User ID and password; click *Login*



4. Click *My Account* on the top right of the page to access Identity Manager

https://portal.transactions.mckhbc.com - Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help

mywebsearch Search Smiley Central Screensavers Cursor Mania PopSwatter Fun Cards

**RelayHealth** Collaboration Compass You are logged in as relayedu **My Account | Logout**

Registration Claims Verification Payor Alerts Support Contact Us Content Layout

**Search** You may use the percent sign (%) for wildcard searches.

Payor ID:   
 CPID:   
 State:   
 Insurance:   
 Payor Name:   
 Reset Search

**Search Payor Edits** You may use the percent sign (%) for wildcard searches.

CPID:   
 Edit Code:   
 Edit Version:   
 Payor Name:   
 Reset Search

**Important News**

- June 26, 2007 RelayHealth Notify: Claims: Enhancement to Normalized Payor Claim Data Report
- June 26, 2007 RelayHealth Notify: Claims: All Medicare Part B CPIDs: Physician Quality Reporting Initiative (PQRI) Guidelines
- June 26, 2007 RelayHealth Notify: Claims: All Medicare Part B CPIDs: New Purchased Services Edits
- June 26, 2007 RelayHealth Notify: Remittance: CPIDs 1447 Ohio Medicare and 1450 West Virginia Medicare: Transmission Delay
- June 26, 2007 RelayHealth Notify: Claims: All Medicare CPIDs: Discontinuance of the UPIN Registry
- June 22, 2007 RelayHealth Notify: Claims: CPID 2704 Ohio Workers Compensation: Claims Processing Delay
- June 22, 2007 RelayHealth Notify: Agreement: CPID 7456 Delaware Blue Shield: Claims Agreement Change
- June 22, 2007 RelayHealth Notify: Update: Claims: CPID 2414 New Jersey Blue Shield: Payor Rejections
- June 21, 2007 RelayHealth Notify: Reminder: Update: Claims: CPID 1470 Texas Medicaid: Special NPI Requirements
- June 20, 2007 RelayHealth Notify: Claims: CPID 2414

**My Eligibility** Learning insurance coverage is necessary to prevent write-offs caused by uncovered patient services, but the traditional verification process is time-consuming and cumbersome. Real-Time Eligibility enables you to reduce the likelihood of preventable write-offs by providing quick, online information of patient insurance and benefit information retrieved directly from a payor's system.

**Breaking News** Learn more about McKesson's Per-Se Technologies acquisition and the expanded services of RelayHealth...

We are combining services and solutions from Per-Se, McKesson, and RelayHealth into one of the largest healthcare networks that will support connectivity and interoperability with both McKesson and non-McKesson solutions.

## 4. My Account

*My Account* allows users to view their roles and modify or view their profile and password.

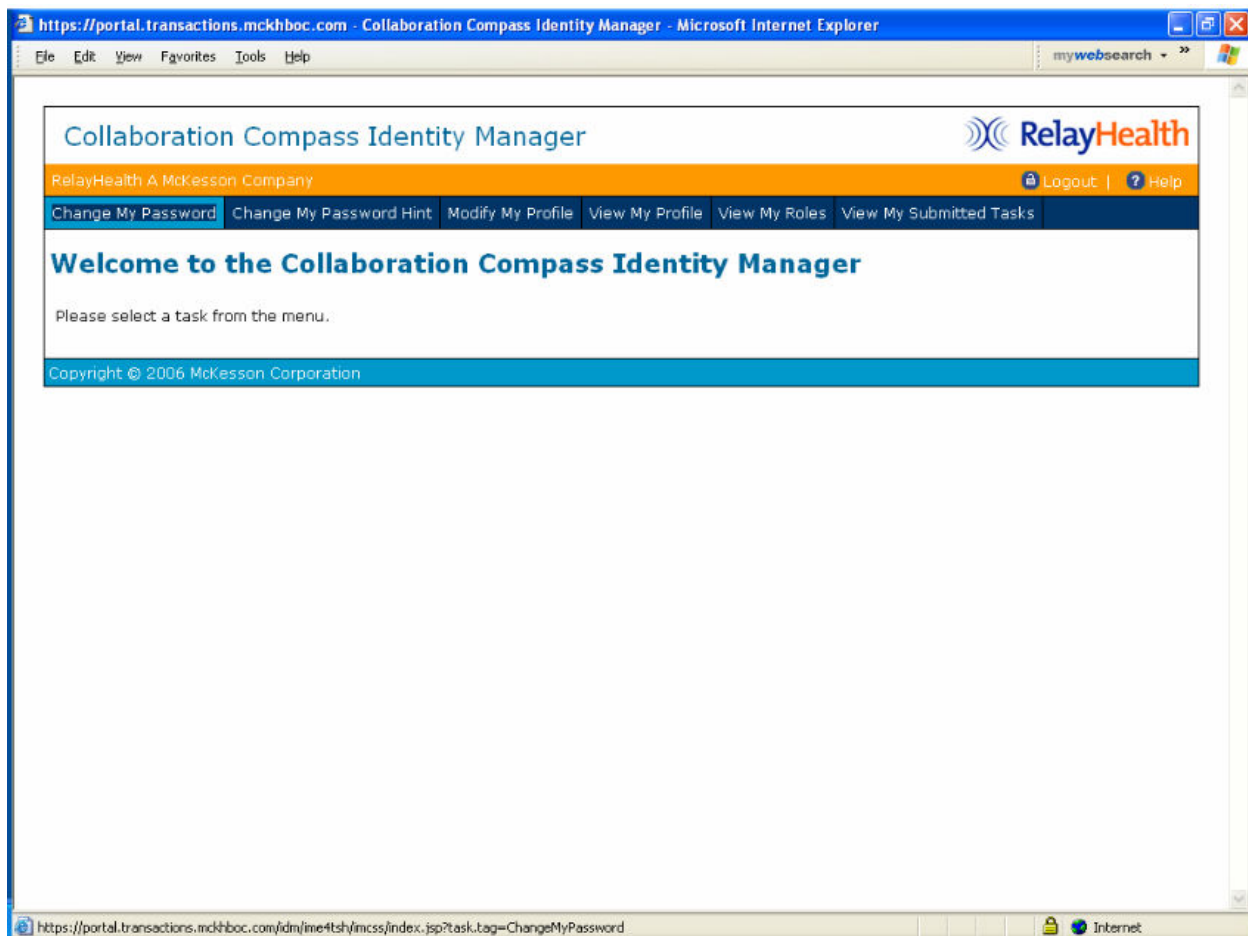
1. Clicking on My Account brings you to the following screen.

### 5.1. Change My Password

The *Change My Password* function allows users to change their password if they know their current password. *Change My Password* may only be accessed if the user is signed in to Identity Management.

1. Click *Change My Password*





Clear the password field, type in the new password, and retype to confirm

2. Click *Submit*

**Change My Password**

Please adhere to the following guidelines when entering a password:

- Minimum of 8 characters
- Must contain at least one uppercase letter
- Must contain at least one lowercase letter
- Must contain at least one number
- Must contain at least one alphabetic character
- Valid characters are: A-Z, a-z, 0-9

\* Indicates required fields.

Organization

User ID

First Name

Last Name

Password

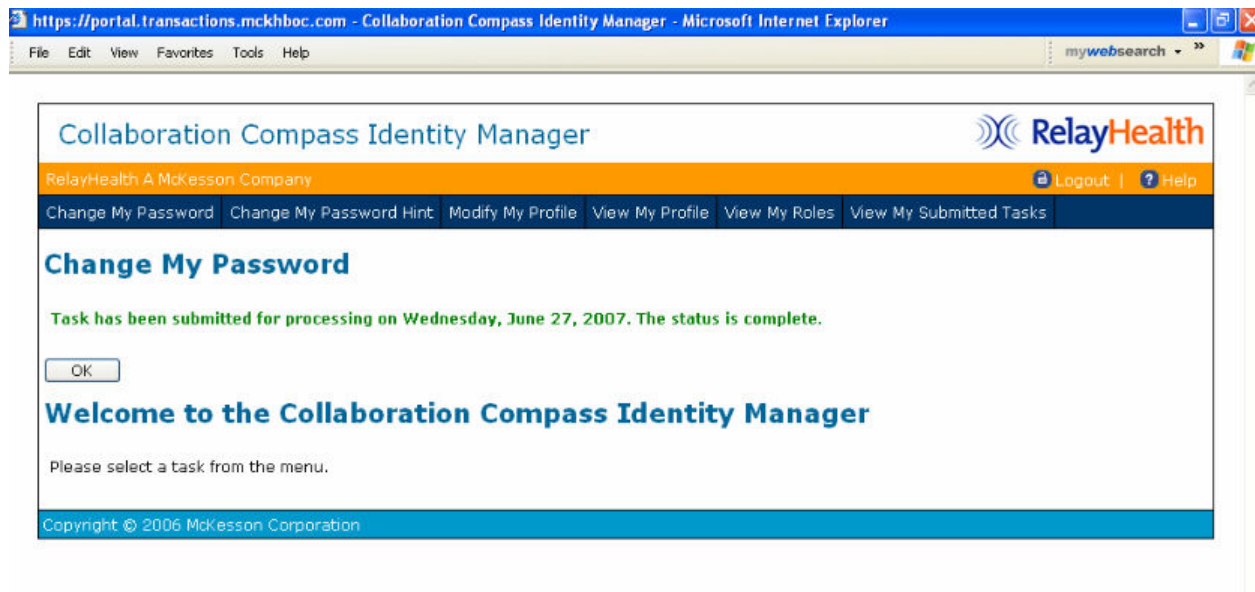
Confirm Password

Question\*

Answer\*

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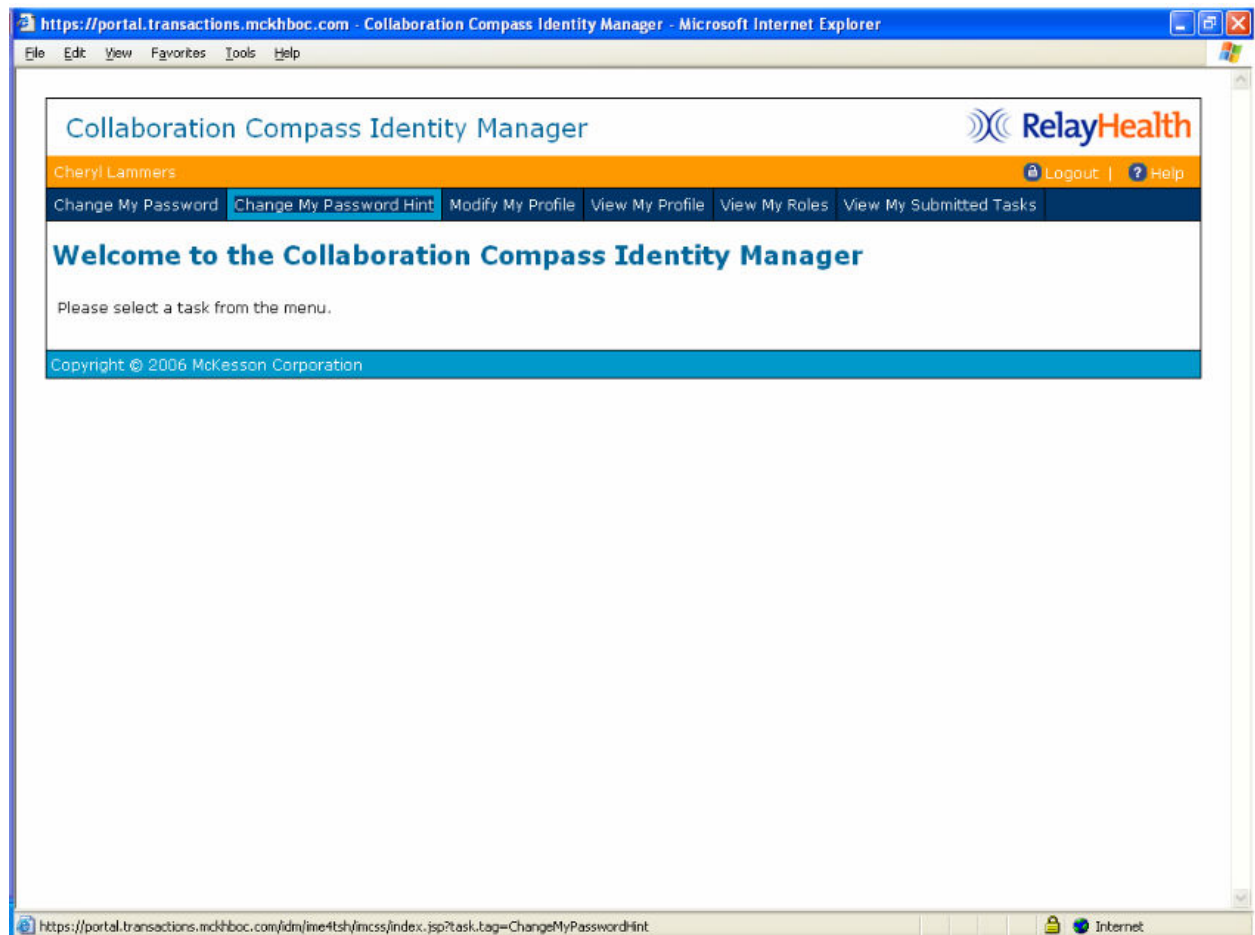
3. Click *OK* to return to the Identity Manager home page



## 5.2. Change My Password Hint

*Change My Password Hint* allows users to change the Challenge question and answer, which is used for security purposes.

1. Click *Change My Password Hint*



2. Update the question and/or answer and click *Submit*

https://portal.transactions.mckhbc.com - Collaboration Compass Identity Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help mywebsearch

Collaboration Compass Identity Manager RelayHealth

RelayHealth A McKesson Company Logout Help

### Change My Password Hint

Organization 999997

User ID relayedu

Question\* color?

Answer\* red

Validate

Submit Cancel

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3. Click OK

File Edit View Favorites Tools Help mywebsearch

Collaboration Compass Identity Manager RelayHealth

RelayHealth A McKesson Company Logout Help

Change My Password Change My Password Hint Modify My Profile View My Profile View My Roles View My Submitted Tasks

### Change My Password Hint

Task has been submitted for processing on Wednesday, June 27, 2007. The status is complete.

OK

### Welcome to the Collaboration Compass Identity Manager

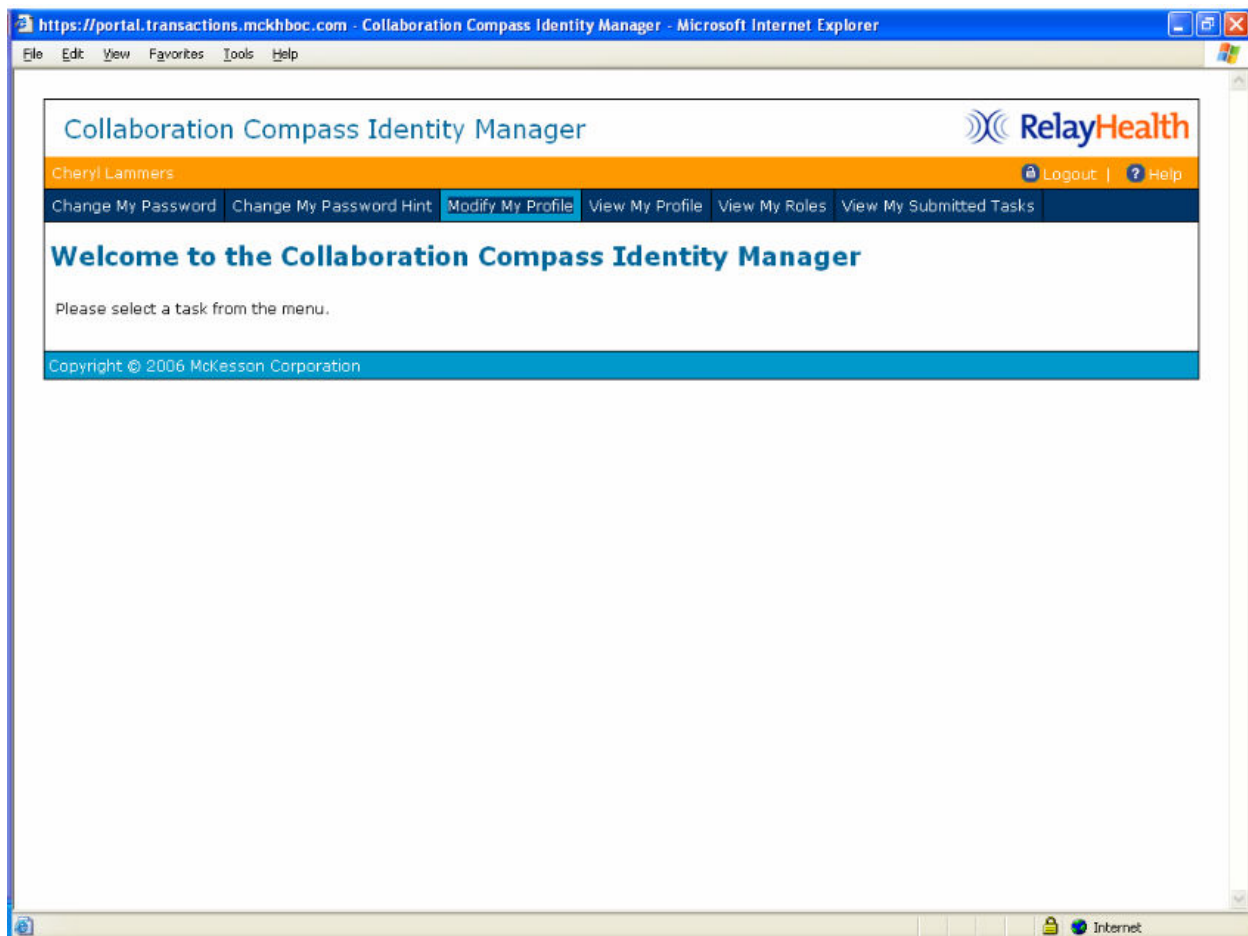
Please select a task from the menu.

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## 5.3. Modify My Profile

*Modify My Profile* allows users to change their demographic information, like the email address or phone number associated with their account.

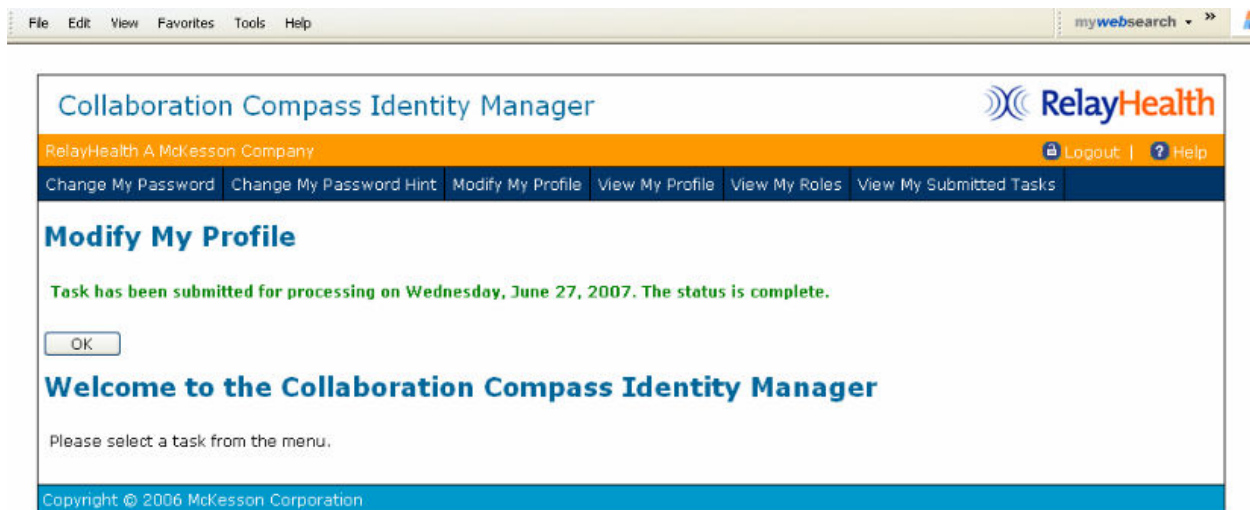
1. Click *Modify My Profile*



2. Update the necessary information and click *Submit*

**Please Note:** Users may only change the submitter ID to another within their scope.

3. Click *OK* to return to the Identity Manager home page



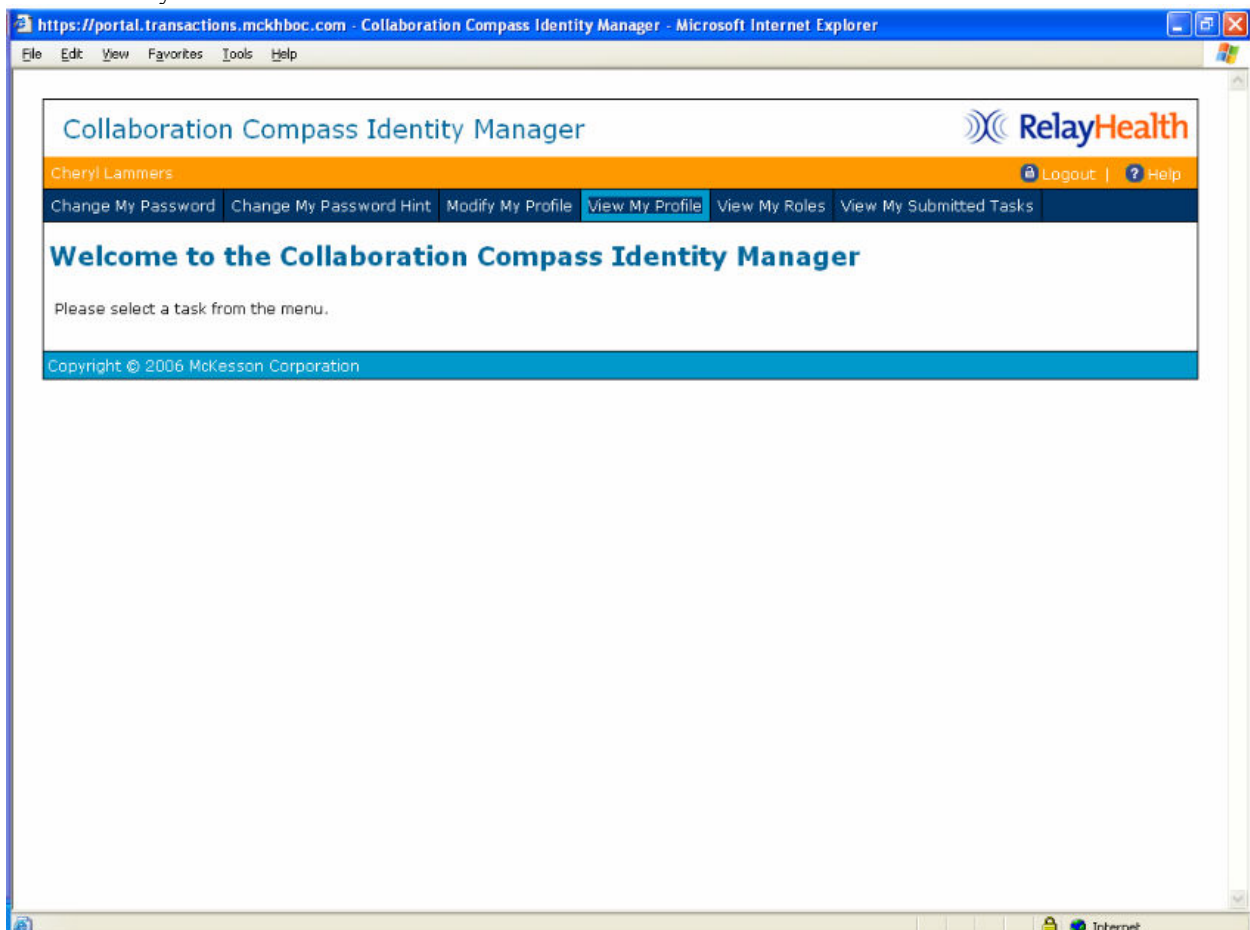
## 5.4. View My Profile

*View My Profile* displays the user's current demographic information and any Access or Admin roles associated with the user setup.

**Access Roles** grant users access to RelayHealth applications, like the ASP Eligibility application or the Agreements Website.

**Admin Roles** allow a user to view and modify other users within their established scope. For example, it allows Business Partners to view and modify their customers' users.

1. Click View My Profile





2. The Profile tab allows users to view their demographic information and News Subscriptions, as well as the Submitter ID associated with their user ID

https://portal.transactions.mckhboc.com - Collaboration Compass Identity Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help mywebsearch »

### Collaboration Compass Identity Manager

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## View My Profile

Profile Access Roles Admin Roles

Organization	999997
User ID	relayedu
Enabled	<input checked="" type="checkbox"/>
First Name*	RelayHealth
Last Name*	A McKesson Company
Full Name	RelayHealth A McKesson Company
Email	RelayHealth@RelayHealth.com
Master Customer ID*	999997
Customer ID*	999997
Submitter ID*	999997
Provider ID	
Hint Question	color?
Hint Answer	red
Phone Number	800-527-8133
News Subscription	

3. To view *Access Roles*, click the Access Roles tab
- Members of a role are granted the rights associated with a role
  - Administrators of a role may assign it to other users

File Edit View Favorites Tools Help mywebsearch »

### Collaboration Compass Identity Manager

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## View My Profile

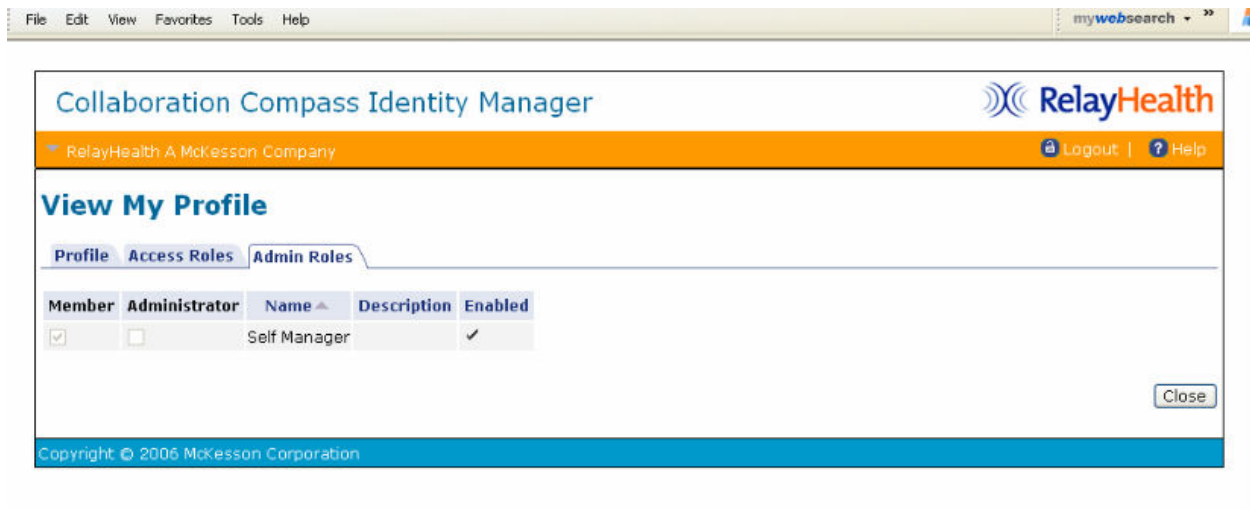
Profile Access Roles Admin Roles

Member	Administrator	Name ▲	Description	Enabled
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Agreements User	User of the Agreements Application with Submitter Scope	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Eligibility User	User of the Eligibility Application	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Master Agreements User	User of the Agreements Application with Master Customer Scope	<input checked="" type="checkbox"/>

Close

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4. To view *Admin Roles*, click the Admin Roles Tab
- Members of a role are granted the rights associated with a role
  - Administrators of a role may assign it to other users



- Click *Close* to return to the Identity Manager home screen

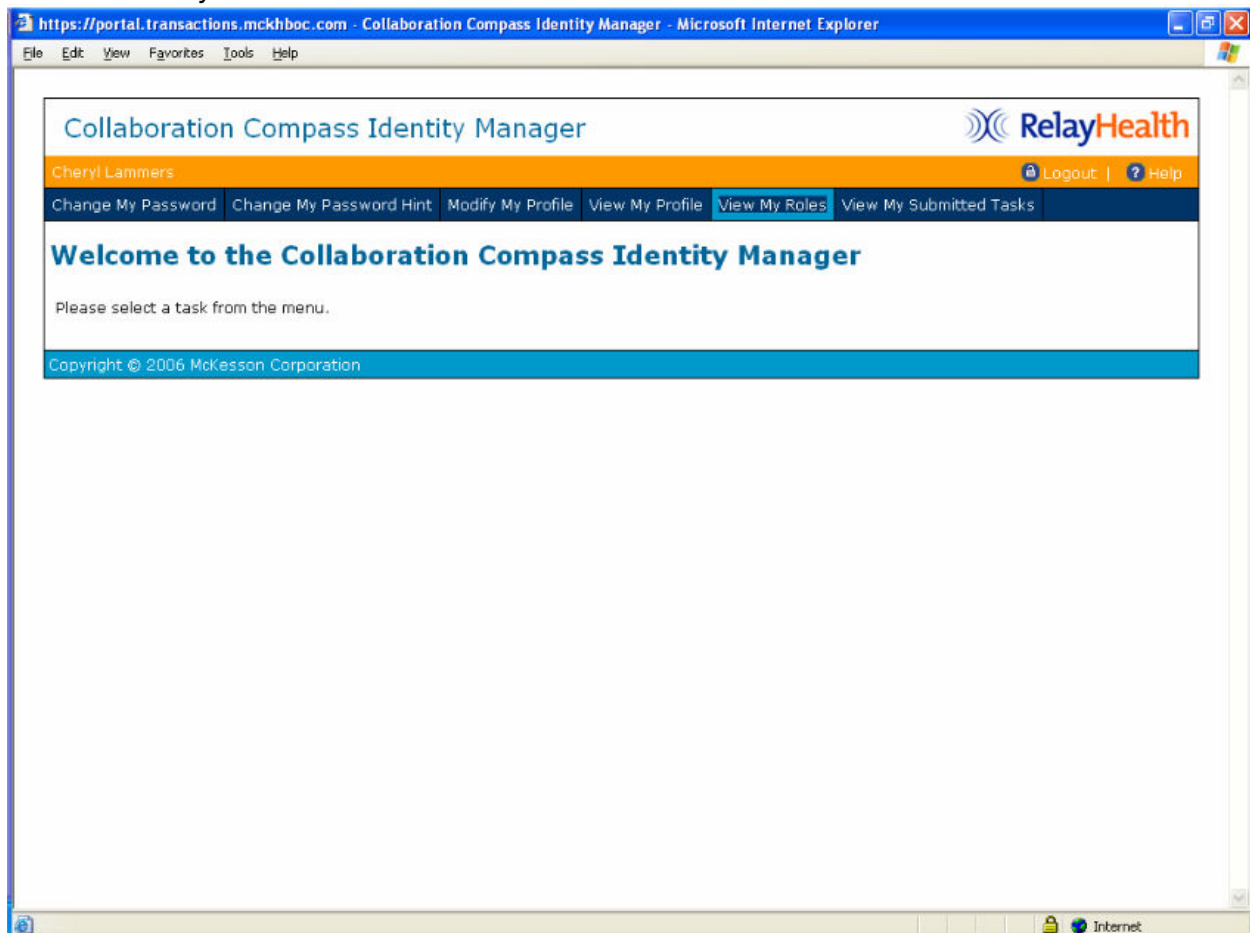
## 5.5. View My Roles

*View My Roles* displays a list of Access and Admin roles associated with a user account.

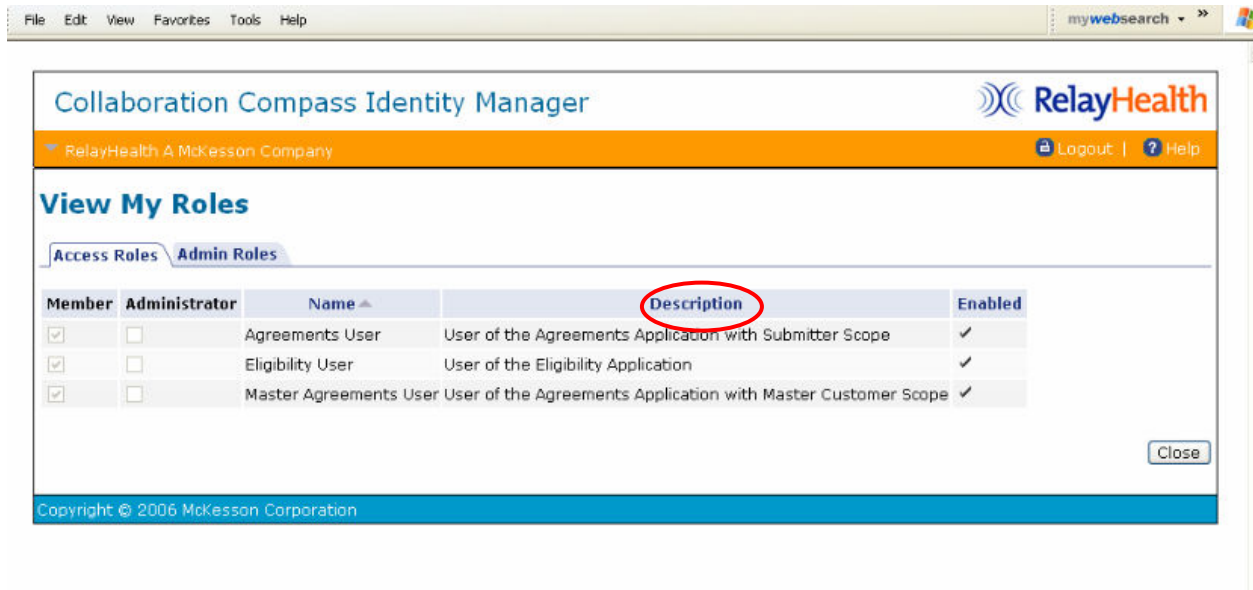
**Access Roles** grant users access to RelayHealth applications, like the ASP Eligibility application or the Agreements Website.

**Admin Roles** allow a user to view and modify other users within their established scope. For example, it allows Business Partners to view and modify their customers' users.

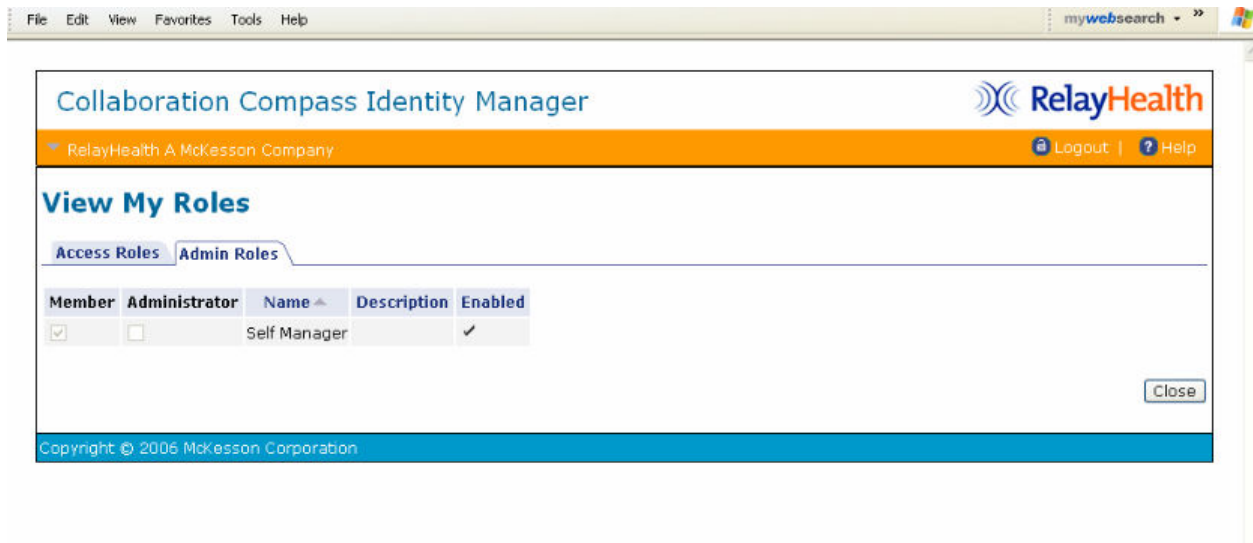
- Click *View My Roles*



2. The *Access Roles* tab will appear when clicking the View My Roles link



3. To view *Admin Roles*, click the Admin Roles tab

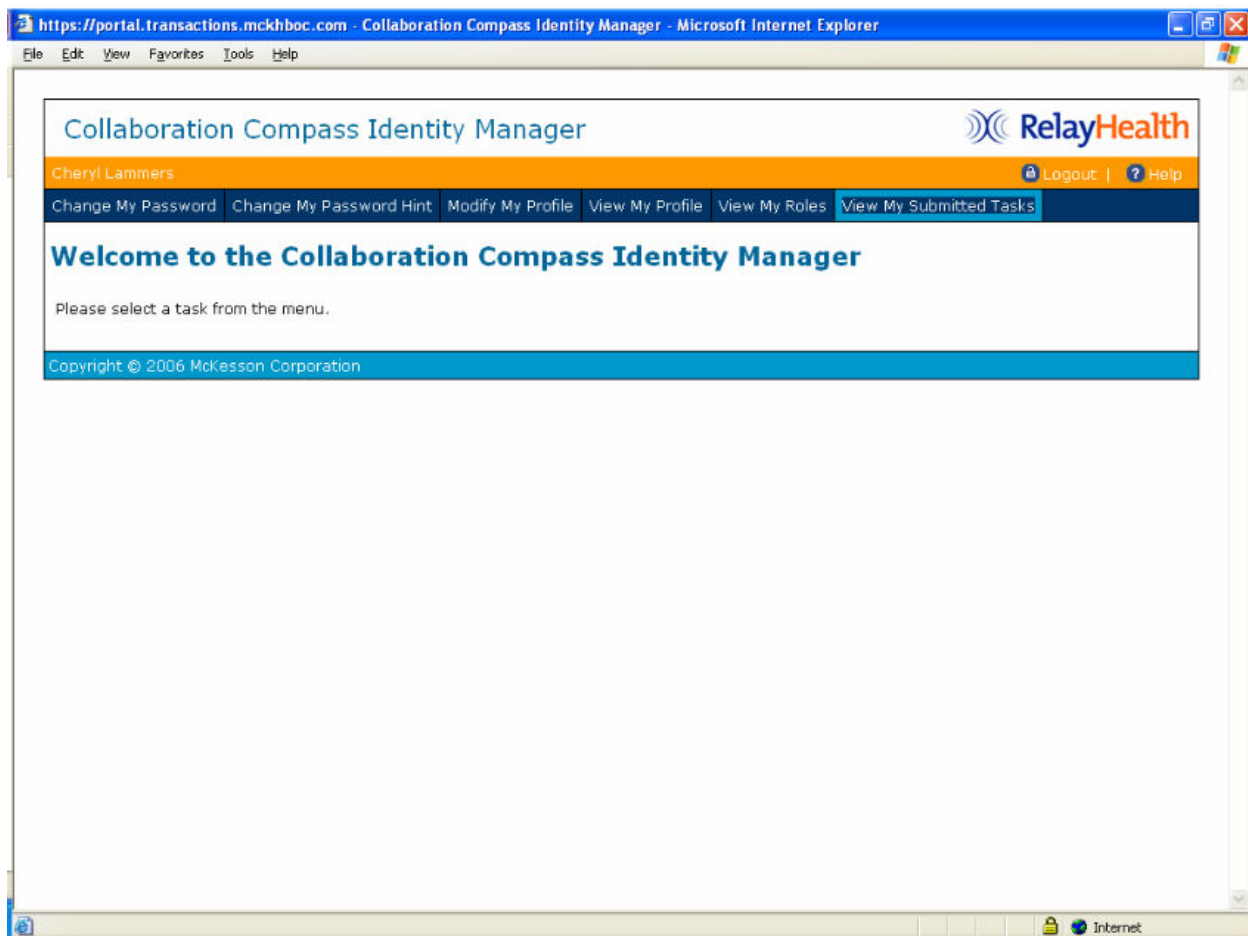


4. Click *Close* to return to the Identity Manager home screen

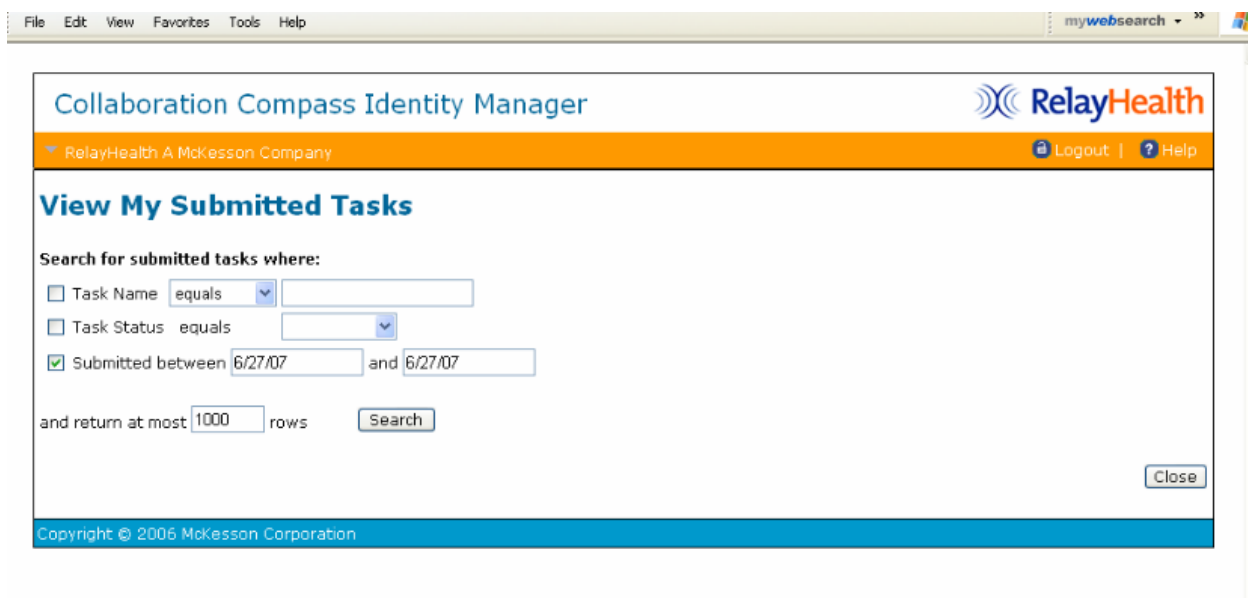
## 5.6. View My Submitted Tasks

*View My Submitted Tasks* enables users to view tasks that they have submitted for processing; it is an audit of any changes made by the user.

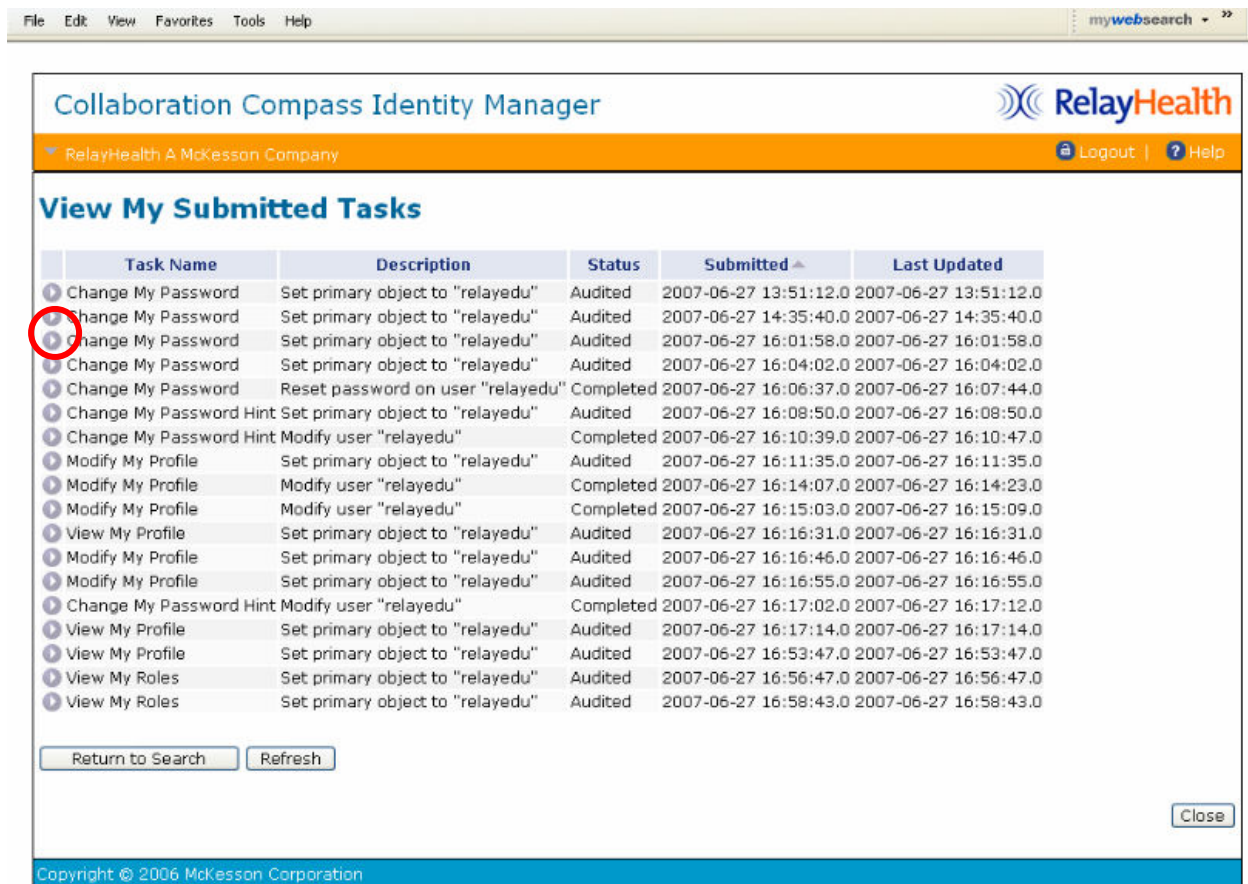
1. Click *View My Submitted Tasks*



2. Enter search criteria
3. Click *Search*



4. Click the Edit icon to view the desired task



Collaboration Compass Identity Manager

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Logout | Help

### View My Submitted Tasks

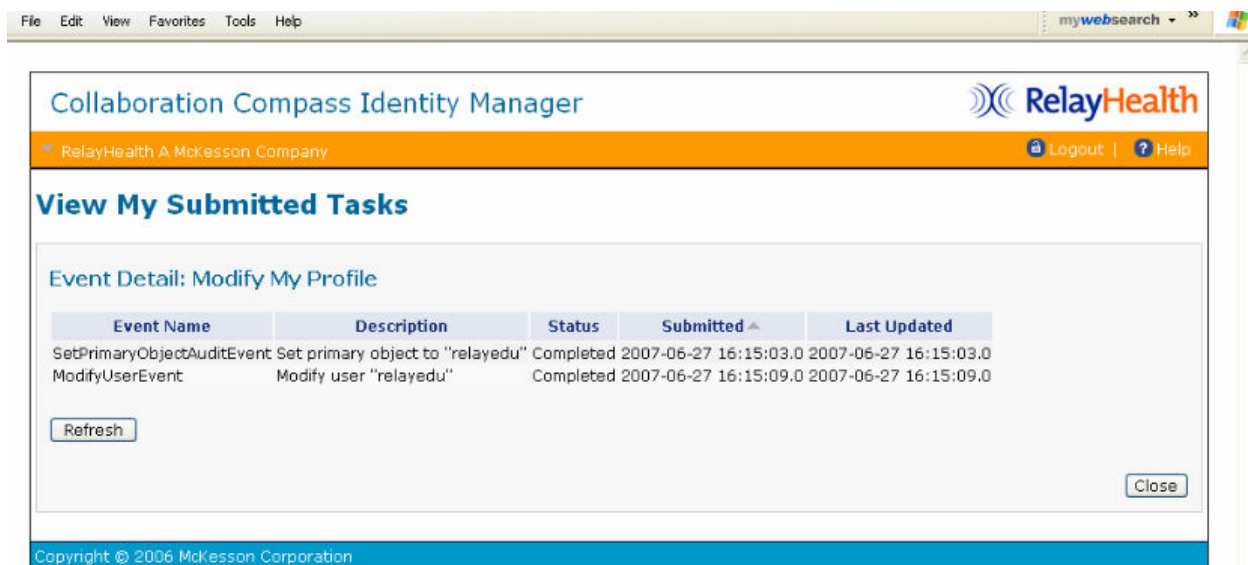
Task Name	Description	Status	Submitted	Last Updated
Change My Password	Set primary object to "relayedu"	Audited	2007-06-27 13:51:12.0	2007-06-27 13:51:12.0
Change My Password	Set primary object to "relayedu"	Audited	2007-06-27 14:35:40.0	2007-06-27 14:35:40.0
Change My Password	Set primary object to "relayedu"	Audited	2007-06-27 16:01:58.0	2007-06-27 16:01:58.0
Change My Password	Set primary object to "relayedu"	Audited	2007-06-27 16:04:02.0	2007-06-27 16:04:02.0
Change My Password	Reset password on user "relayedu"	Completed	2007-06-27 16:06:37.0	2007-06-27 16:07:44.0
Change My Password Hint	Set primary object to "relayedu"	Audited	2007-06-27 16:08:50.0	2007-06-27 16:08:50.0
Change My Password Hint	Modify user "relayedu"	Completed	2007-06-27 16:10:39.0	2007-06-27 16:10:47.0
Modify My Profile	Set primary object to "relayedu"	Audited	2007-06-27 16:11:35.0	2007-06-27 16:11:35.0
Modify My Profile	Modify user "relayedu"	Completed	2007-06-27 16:14:07.0	2007-06-27 16:14:23.0
Modify My Profile	Modify user "relayedu"	Completed	2007-06-27 16:15:03.0	2007-06-27 16:15:09.0
View My Profile	Set primary object to "relayedu"	Audited	2007-06-27 16:16:31.0	2007-06-27 16:16:31.0
Modify My Profile	Set primary object to "relayedu"	Audited	2007-06-27 16:16:46.0	2007-06-27 16:16:46.0
Modify My Profile	Set primary object to "relayedu"	Audited	2007-06-27 16:16:55.0	2007-06-27 16:16:55.0
Change My Password Hint	Modify user "relayedu"	Completed	2007-06-27 16:17:02.0	2007-06-27 16:17:12.0
View My Profile	Set primary object to "relayedu"	Audited	2007-06-27 16:17:14.0	2007-06-27 16:17:14.0
View My Profile	Set primary object to "relayedu"	Audited	2007-06-27 16:53:47.0	2007-06-27 16:53:47.0
View My Roles	Set primary object to "relayedu"	Audited	2007-06-27 16:56:47.0	2007-06-27 16:56:47.0
View My Roles	Set primary object to "relayedu"	Audited	2007-06-27 16:58:43.0	2007-06-27 16:58:43.0

Return to Search Refresh

Close

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**Please Note:** Users will see Completed or Audited in the Status column for each task. Completed tasks are changes submitted to the application and completed. Audited tasks were viewed but no change was submitted. An audit entry is inserted each time an item is viewed.



Collaboration Compass Identity Manager

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Logout | Help

### View My Submitted Tasks

#### Event Detail: Modify My Profile

Event Name	Description	Status	Submitted	Last Updated
SetPrimaryObjectAuditEvent	Set primary object to "relayedu"	Completed	2007-06-27 16:15:03.0	2007-06-27 16:15:03.0
ModifyUserEvent	Modify user "relayedu"	Completed	2007-06-27 16:15:09.0	2007-06-27 16:15:09.0

Refresh

Close

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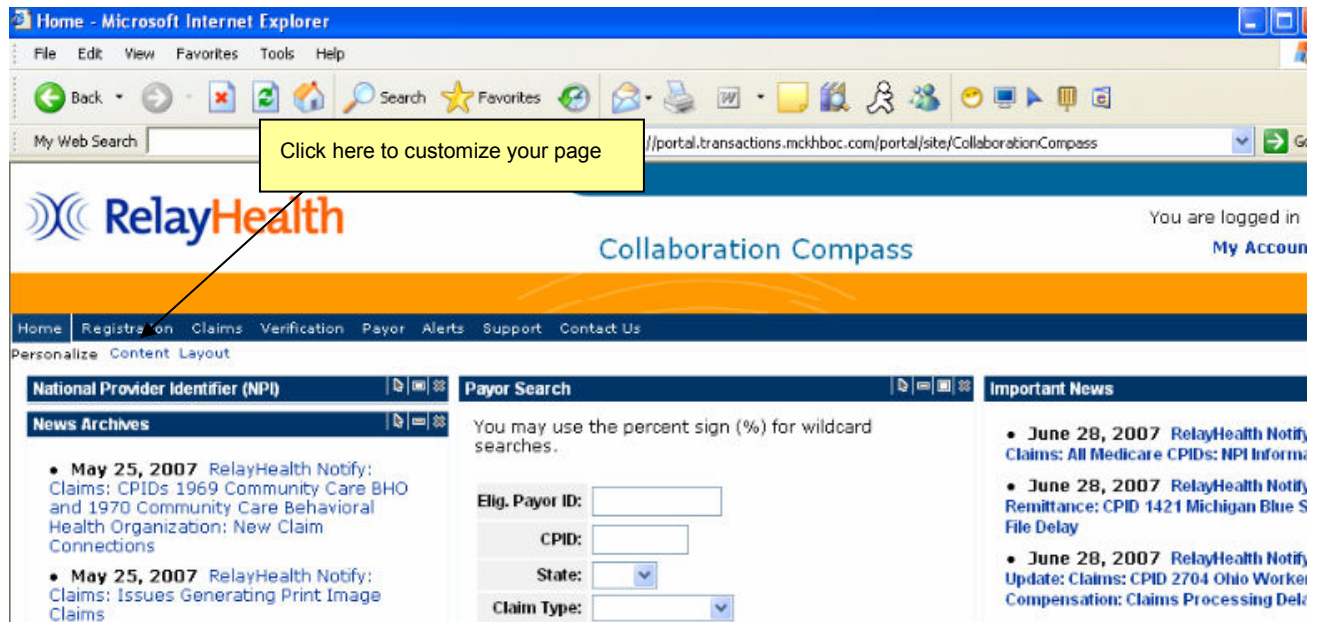
5. Click *Close* to return to the Identity Manager home page



## 6. Customizing Your Pages

### Overview

You have the ability to customize the content and layout of your Home page. On other pages, you have the ability to minimize and maximize portlets.



The following is an example of what is meant by a portlet:

A close-up view of the "Payor Search" portlet. The portlet title is "Payor Search". Below the title is a message: "You may use the percent sign (%) for wildcard searches." The form contains the following fields and controls:

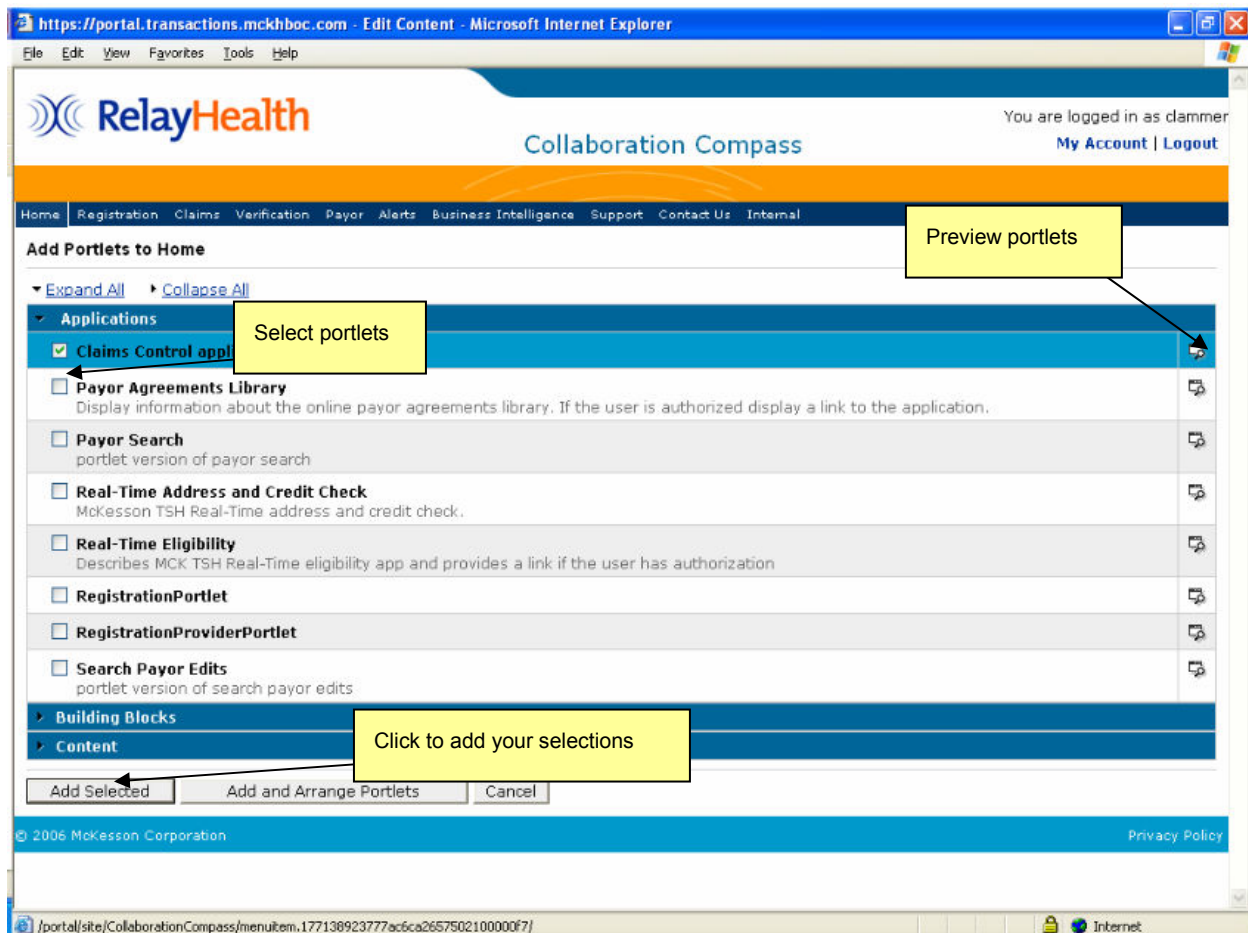
- Elig. Payor ID:
- CPID:
- State:
- Claim Type:
- Insurance:
- Payor Name:
- Reset:
- Search:

## 6.1. Adding Content


To add content to your Home page, complete the following steps:

### Main Path

1. Click the “Content” link at the top left of the page. See illustration in [Overview](#) section.
2. Select the portlets you wish to add to your page by clicking the check box for each portlet.
3. Click the “Add Selected” or “Add and Arrange Portlets” button.



The following describes each of the elements found on the Add Content page:

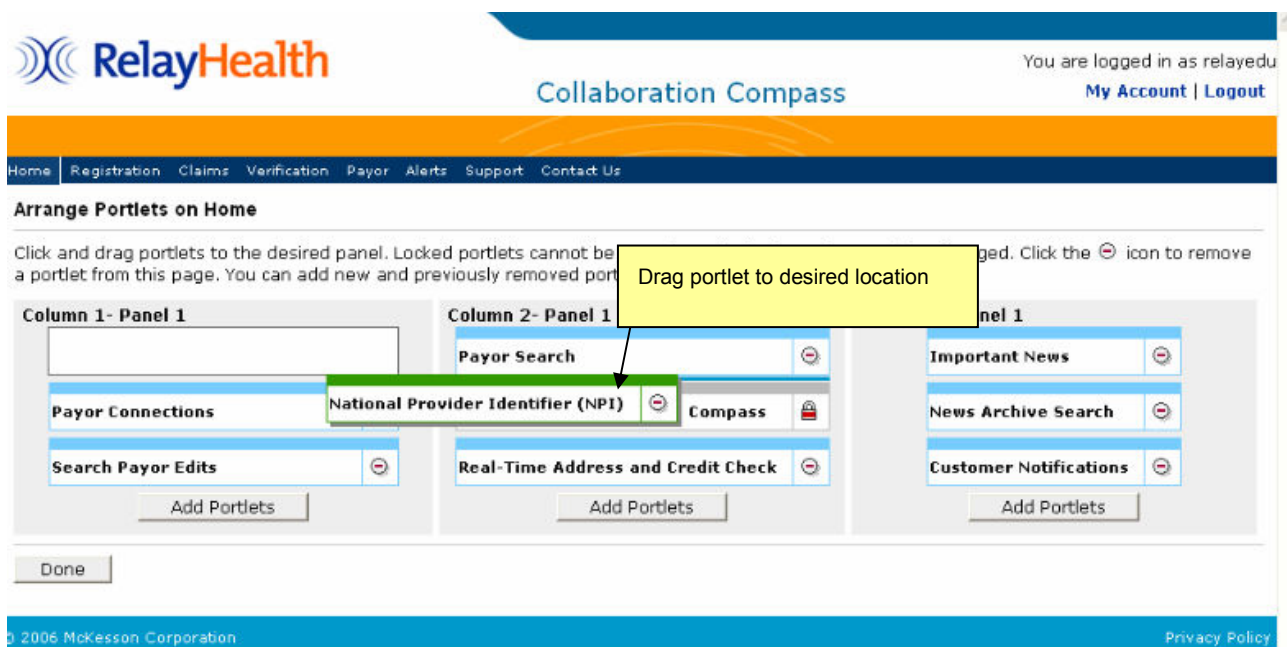
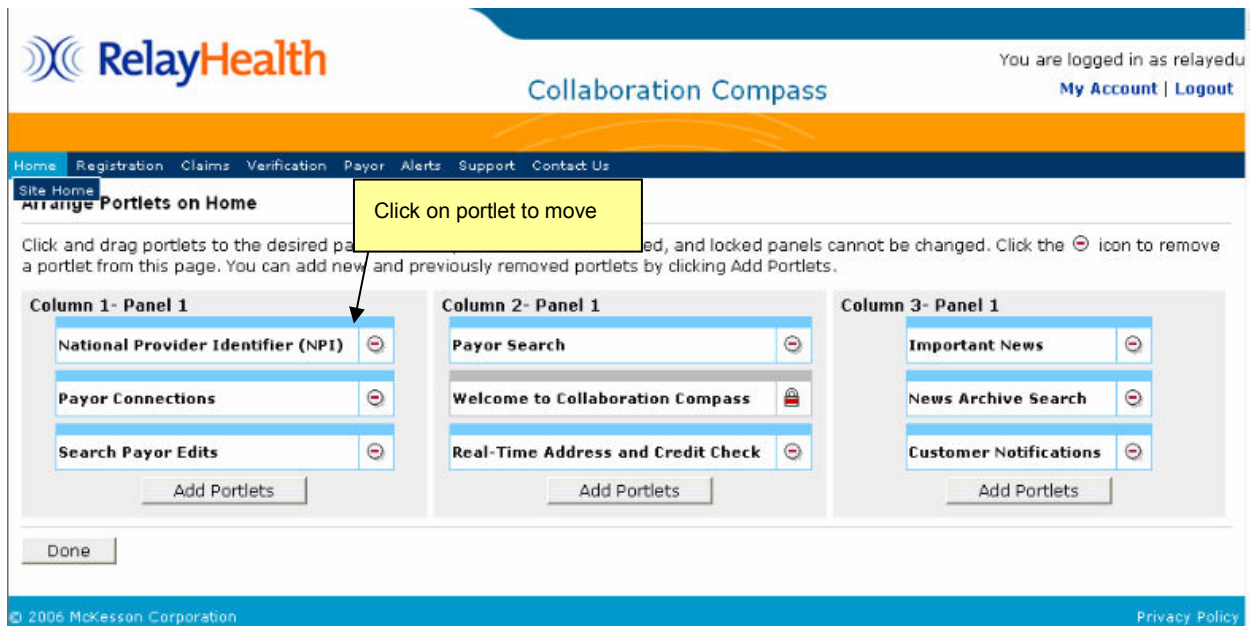
<b>Expand All</b>		Clicking this link expands all sections to display all portlets.
<b>Collapse All</b>		Clicking this link collapses all sections and only the section headings will appear.
<b>Preview Icon</b>		Clicking this icon displays a preview of the content of that portlet.
<b>Portlet List</b>		Each portlet contains a description of the portlet and a check box for selection.
<b>Add Selected</b>		Clicking this button displays either your Home page or the Applications page with the selected portlets added to the page.
<b>Add and Arrange Portlets</b>		Clicking this button displays adds the selected portlets and displays the Layout page.

## 6.2. Layout



To arrange the layout of portlets on your Home page, complete the following steps:

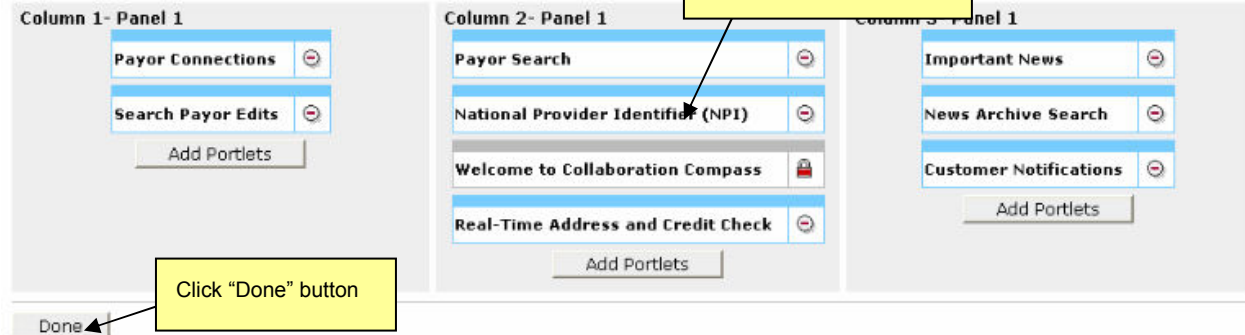
### Main Path

1. Click the “Layout” link at the top left of the page. See illustration in [Overview](#) section.
2. Click on the portlet you would like to move and drag it to the desired location.
3. Click the “Done” button.



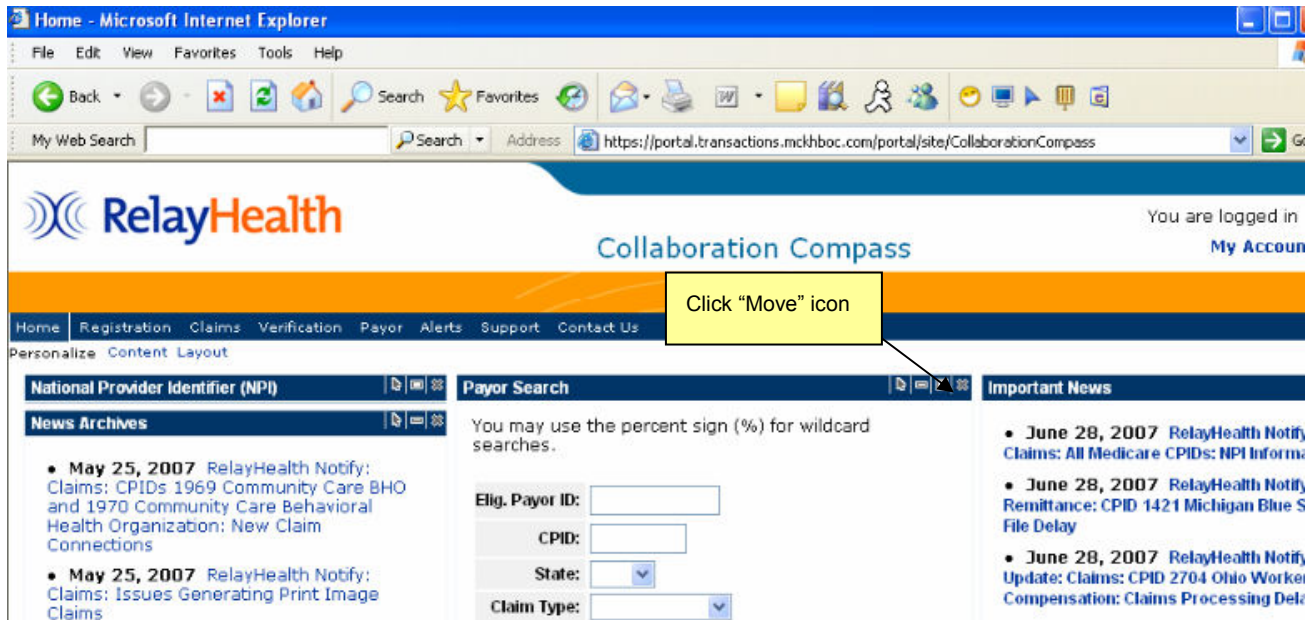
## Arrange Portlets on Home

Click and drag portlets to the desired panel. Locked portlets cannot be moved, and locked portlets cannot be removed. Click the  icon to remove a portlet from this page. You can add new and previously removed portlets by clicking the  icon.




## Alternate Path

1. On your Home page, click the "Move" icon  for the portlet you wish to move and drag it to the desired location.






The following describes each of the elements found on the Layout page:

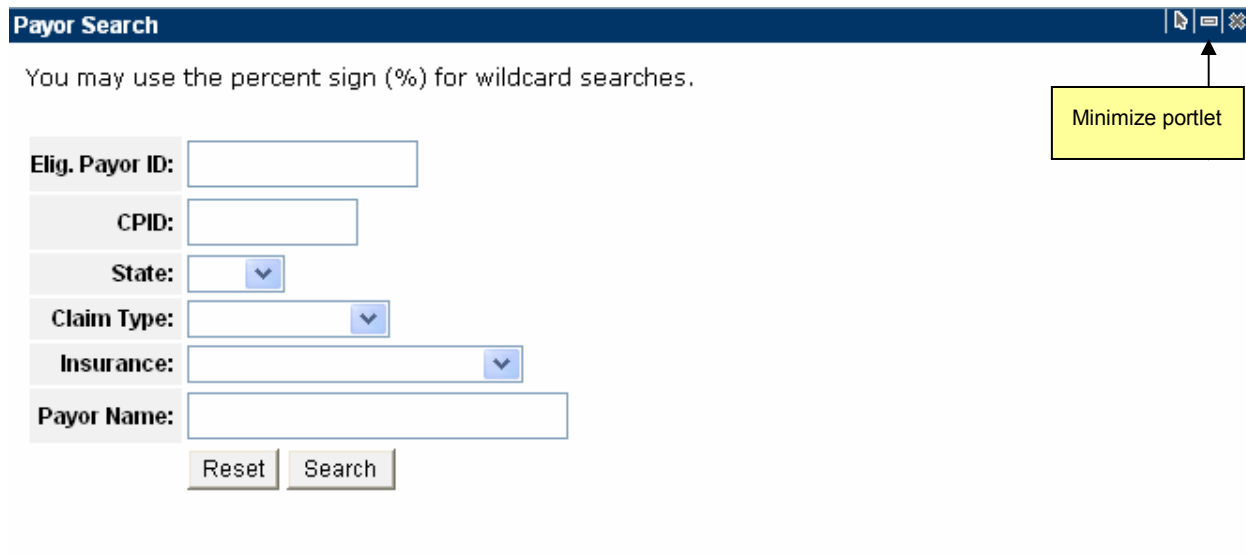
<b>Instructional Text</b>	Gives instruction on arranging portlets on a page.
<b>Portlet</b>	Each portlet will be displayed in it's location on the page. Clicking on the portlet will allow you to drag it to a new location on the page.
<b>Remove Icon</b>	 Clicking this icon removes the portlet from the page.




<b>Portlet List</b>	Each portlet contains a description of the portlet and a check box for selection.
<b>Add Portlets</b>	Clicking this button displays the <a href="#">Add Content</a> page.
<b>Done</b>	Clicking this button displays either your Home page or the Applications page with your layout changes.

### 6.3. Minimizing/Maximizing Portlets

Minimizing a portlet will collapse the portlet and only display the header bar. To minimize a portlet, click the minimize icon. 



Maximizing a portlet will restore the portlet to its normal size. To maximize a portlet, click the maximize icon.  The maximize icon will only appear when a portlet is minimized.

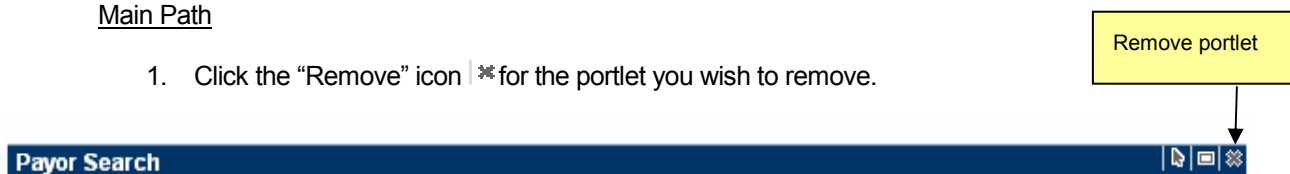


### 6.4. Removing Portlets


To remove portlets on your Home page or the Applications page, complete the following steps:

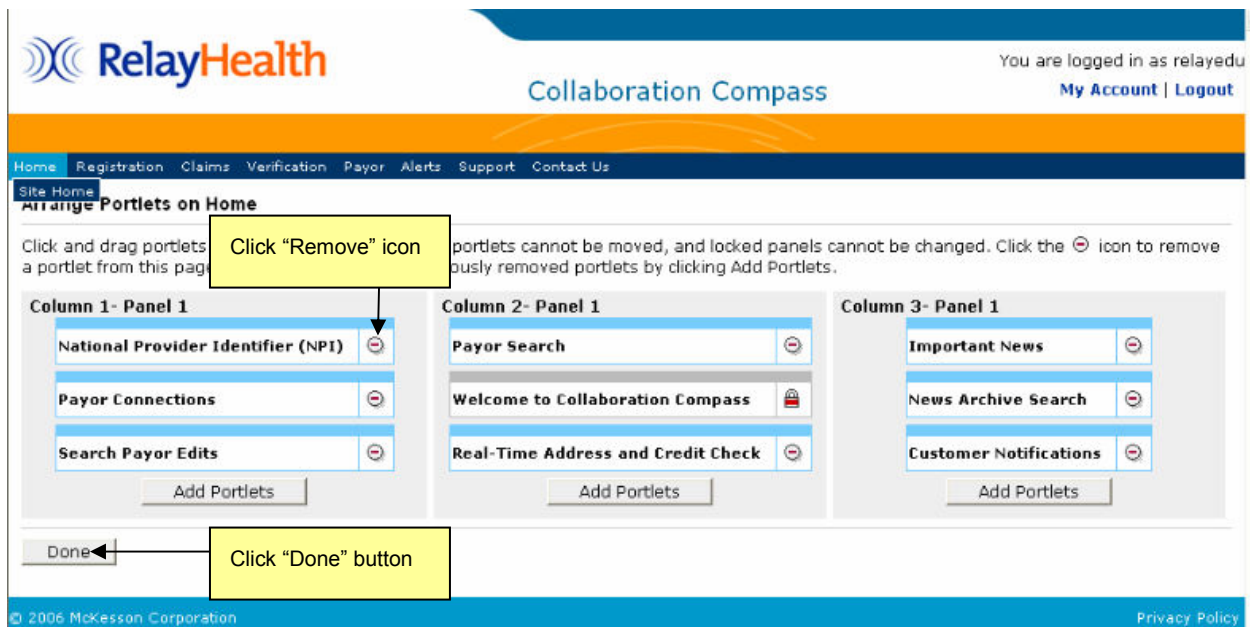
#### Main Path

1. Click the “Remove” icon  for the portlet you wish to remove.



## Alternate Path

1. Click the “Layout” link at the top left of the page. See illustration in [Overview](#) section.
2. Click the “Remove” icon  on the Layout page.
3. Click the “Done” button.



## 7. Home

Your Home page will contain whatever portlets you choose to appear on the page. You can have as many portlets as you wish on the page (see [Adding Content](#)) and arrange them in the layout of your choice (see [Layout](#)).

## 8. Site Home

The Site Home page contains a description of the Transaction Services and the services provided.

## 9. Claims

### 8.1. Claims Control

The Claims Control page displays a portlet with a description of the Claims Control application and if the user has the appropriate permissions, a link to the application is displayed. Clicking the link will open the application in a new window.

**McKESSON**  
Empowering Healthcare

Collaboration Compass

You are logged in as demouse  
[My Account](#) | [Logout](#)

Home Registration Claims Verification Payor Alerts Support Contact Us

**Claims Control application**

Claims Control accelerates payment by providing an automated means to correct and submit insurance claims. Claims Control provides claims management, including editing claims to payor specifications, managing workflow, claims submission, and normalized payor reporting.

Additionally, our optional compliance component empowers providers to improve compliance and meet financial business objectives. Compliance Control identifies additional clinical claims errors to comply with coding guidelines. This interface adds more than 700,000 edits to eliminate claims rejections and fraud by validating modifiers, identifying procedures subject to frequency limitations and auditing claims for unbundling, duplicate services, mutually exclusive procedures, non-covered codes and more.

[Claims Control](#)

Link to application

## 9. Verification

### 9.2. Eligibility

The Eligibility page displays a portlet with a description of the Real-Time Eligibility application and if the user has the appropriate permissions, a link to the application is displayed. Clicking the link will open the application in a new window.

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**Real-Time Eligibility**

Verifying insurance coverage is necessary to prevent write-offs caused by uncovered patient services, but the traditional verification process is time-consuming and cumbersome. Real-Time Eligibility enables you to reduce the likelihood of bad debt write-offs by providing quick, online confirmation of patient insurance and benefit coverage retrieved directly from a payor's database. Because Real-Time Eligibility is fully integrated with McKesson's patient accounting systems, your organization will experience even greater speed and efficiency in processing patient financial information.

[Real-Time Eligibility](#)

Link to application

### 9.3. Address Check

The Address Check page displays a portlet with a description of the Real-Time Address and Credit Check application and if the user has the appropriate permissions, a link to the application is displayed. Clicking the link will open the application in a new window.

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**Real-Time Address and Credit Check**

To increase revenue, healthcare providers must have complete and reliable patient identification, address information and credit history when service is first requested. McKesson's Real-Time Address & Credit Check enables hospitals to verify patient identification, address information and credit worthiness at the time of registration, saving staff time and collection costs. In addition, patients with a poor credit history can be routed to a financial counselor to set up a payment plan before services are rendered, reducing self-pay bad debt.

[Real-Time Address and Credit Check](#)

Link to application

### 9.4. Credit Check

The Credit Check page displays a portlet with a description of the Real-Time Address and Credit Check application and if the user has the appropriate permissions, a link to the application is displayed. Clicking the link will open the application in a new window.



## 10. Payor

### 10.5. Payor Agreements

The Payor Agreements page displays a portlet with a description of the Payor Agreements Library application and if the user has the appropriate permissions, a link to the application is displayed. Clicking the link will open the application in a new window.



## 11. Alerts

### 11.6. What's New

To display the important news items and all customer notifications, choose the What's New item under the Alerts navigation item.

The What's New page contains the following information:

- Important News
- Important News Search
- Customer Notifications
- Customer Notification Search

To perform an Important News search, enter the criteria of your choice and click the "Search" button. The results of the search are displayed in a new window.

To perform a Customer Notification search, enter the criteria of your choice and click the "Search" button. The results of the search are displayed in a new window.

### Important News

### Important News Search

  
By:    
\*Date Format: dd-MON-yy (MON = JAN, FEB, MAR, etc.)

### Customer Notifications

### Customer Notification Search

  
By:    
\*Date Format: dd-MON-yy (MON = JAN, FEB, MAR, etc.)

- June 28, 2007 RelayHealth Notify: Claims: All Medicare CPIDs: NPI Information
- June 28, 2007 RelayHealth Notify: Remittance: CPID 1421 Michigan Blue Shield: File Delay
- June 28, 2007 RelayHealth Notify: Update: Claims: CPID 2704 Ohio Workers Compensation: Claims Processing Delay
- June 28, 2007 RelayHealth Notify: Update: Claims: CPID 1913 Medicare Plus Blue - Michigan Medicare Advantage Plan: Claim Rejections
- June 28, 2007 RelayHealth Notify: Update: Claims: CPID 4404 Washington Workers Compensation: Claims Processing Delay
- June 26, 2007 RelayHealth Notify: Claims: Enhancement to Normalized Payor Claim Data Report
- June 26, 2007 RelayHealth: Claims: All Medicare Part B CPIDs: Physician Quality Reporting Initiative (PQRI) Guidelines
- June 26, 2007 RelayHealth Notify: Claims: All Medicare Part B CPIDs: New Purchased Services Edits

### National Provider Identifier (NPI)

#### Payor NPI Readiness:

- Payors Accepting NPI
- Payors Requiring NPI Testing

#### New CMS Paper Forms:

- Institutional Paper Payor Readiness

## 11.7. News Archive

To find past postings of customer notifications, click on the News Archive option under the Alerts item on the navigation menu.

The News Archive page contains the following information:

- News Archives
- News Archive Search

To perform a News Archive search, enter the criteria of your choice and click the “Search” button. The results of the search are displayed in a new window.

### News Archives

### News Archive Search

  
By:    
\*Date Format: dd-MON-yy (MON = JAN, FEB, MAR, etc.)

- May 25, 2007 RelayHealth Notify: Claims: CPIDs 1969 Community Care BHO and 1970 Community Care Behavioral Health Organization: New Claim Connections
- May 25, 2007 RelayHealth Notify: Claims: Issues Generating Print Image Claims
- May 25, 2007 RelayHealth Notify: Claims: Noridian Administrative Services Report Processing Issue
- May 25, 2007 RelayHealth Notify: Claims: CPID 3590 and 4428 West Virginia Workers Compensation: conversion to ANSI 4010A1
- May 25, 2007 RelayHealth Notify: Claims: CPIDs 4528 and 6539: ERA Issues
- May 24, 2007 RelayHealth Notify: Webinar Invitation: Registration Overview, Thursday, May 31, 2007
- May 24, 2007 RelayHealth Notify: Claims: All Medicare CPIDs: Medicare NPI Compliance Information
- May 24, 2007 RelayHealth Notify: Claims: Update: CPIDs 2438 and 8504 Tufts Health Plan: NPI Implementation Requirements: New Payor Edits
- May 24, 2007 RelayHealth Notify: Claims: CPID 5500 Texas Medicaid: NPI Implementation Requirements
- May 24, 2007 RelayHealth Notify: Claims: Update: CPID 1470 Texas Medicaid: Special NPI Requirements



## 12. Support

To display the main Support page, click on the Support item on the navigation bar. The main Support page contains the following information:

- Support Services
- Support Schedules
- Case Standards
- Support Links

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### Support Services

At McKesson, our goal is to not simply meet customer expectations but to exceed them. We are continually focused on what we can do to improve our service to you. Our **SCP** certified support center is always striving to satisfy our customers' needs. The following information provides an overview of our support center:

**Many Support Options Available to Help You Solve Issues**

- **Support Hours**  
In order to best serve our customers, the Transaction Solutions Hub Support Center is open from **7:00 a.m. - 5:30 p.m., CST, Monday - Friday** (with the exception of holidays).
- **Logging Cases**  
McKesson accepts various methods of reporting an issue. Customers can report issues via telephone, e-mail, facsimile, or the SAGE website. For more information on the SAGE website please see the Support Links section to the right of this page.
- **Response and Resolution Goals**  
Response time and case resolution goals have been established and are tracked on a monthly basis. The TSH support center closely monitors service level metrics.
- **Follow-up Process**  
Our follow-up process establishes the mutually agreed upon time that our customers can expect a follow up status on their open cases and this date is placed in the case. Daily follow up reports are made to ensure we have met our

### Support Schedules

- **Transaction Services Processing Schedule**  
\*\* All times are Central Time \*\*  
Batch Processing:  
Daily **4:00 PM and 12:05 AM**
- CA/EC Reports:  
Express **Immediate**
- Standardized Payor Reports:  
Daily **4:00 AM, 12:00 Noon, and 4:00 PM**
- Legacy Payor Reports:  
Monday - Friday **9:00 AM and 3:00 PM**  
Saturday and Sunday **3:00 PM Only**

### 12.8. Payor

From the Support item on the navigation bar, click on the Payor option to display the Payor page. The Payor page contains the following information:

- Payor Connections

Payor connections for existing and new professional and institutional claims (state and commercial) are accessible. Remittances, eligibility, upcoming formats, and ANSI formatted payors are also available.

The payor connections reports may be generated in an online, report format (click "Report") or exported to a text file (click "File").

- Payor Search

The Payor Search utility pulls together all of the payor information (edits, agreement requirements, guides, etc.) available on RelayHealth web site into a comprehensive payor data resource.

To perform a Payor Search, enter the criteria of your choice and click the "Search" button. The results of the search are displayed in a new window. To clear all criteria fields, click the "Reset" button.

- Search Payor Edits

The Payor Edits utility allows users to view ANSI payor-specific edits for any payors that currently have connections with RelayHealth and receive an ANSI claim file.

To search Payor Edits, enter the criteria of your choice and click the “Search” button. The results of the search are displayed in a new window. To clear all criteria fields, click the “Reset” button.

The screenshot displays the RelayHealth Collaboration Compass web application. The top navigation bar includes the RelayHealth logo, the text "Collaboration Compass", and a user login status "You are logged in as relayedu" with links for "My Account" and "Logout". Below this is a secondary navigation bar with links: Home, Registration, Claims, Verification, Payor, Alerts, Support, and Contact Us. The main content area is divided into two panels. The left panel, titled "Payor Connections", contains text explaining that McKesson Provider Technologies provides a vast network of connectivity, allowing providers to communicate electronically with payors. It also mentions that Payor Connections reports can be generated in report format or exported to a text file. A note states that once a report is generated, the linked column headings can be clicked to re-sort the report. Below this text are two sections: "New Connections" with links for "New Claim Formats", "New Remittance Formats", "Upcoming Claim Format Schedule", and "Upcoming Remittance Format Schedule"; and "Claims & Remittance" with a list of categories and links for "Report" and "File". The right panel, titled "Payor Search", includes a heading "You may use the percent sign (%) for wildcard searches." and a form with fields for "Elig. Payor ID:", "CPID:", "State:" (a dropdown menu), "Claim Type:" (a dropdown menu), "Insurance:" (a dropdown menu), and "Payor Name:". There are "Reset" and "Search" buttons at the bottom of the form. Below the "Payor Search" panel is another section titled "Search Payor Edits" with a heading "You may use the percent sign (%) for wildcard searches." and fields for "CPID:" and "Edit Code:".

## 12.9. Customer Education/Training

From the Support item on the navigation bar, click the Customer Education/Training option to display the Customer Education and Training page.

RelayHealth offers webinar training for clients on various topics. The Customer Education and Training page contains information about webinars and a list of upcoming webinars.

### Customer Education and Training

#### How to Register for a Webinar:

An invitation will be sent out via e-mail one week prior to each webinar. Upon receipt of the invitation, please reply to the e-mail. A confirmation e-mail will be sent along with any helpful documentation on the topic.

#### RelayHealth Customer Webinar Schedule

Topic	Date	Time (CT)	Duration	Targeted Audience
Logging SAGE Web Cases	6/26/2007	10:00 AM	1 hour	All Business Partners
Overview of Collaboration Compass	6/28/2007	10:00 AM	1 hour	All Business Partners
Payor Verification Overview	7/10/2007	10:00 AM	1 hour	All Business Partners
Overview of Real-Time ASP	7/12/2007	10:00 AM	1 hour	Real Time Eligibility Customers
Registration Overview	7/19/2007	10:00 AM	1 hour	All Business Partners
Reading Eligibility (271) Responses	7/26/2007	10:00 AM	1 hour	Real Time Eligibility Customers
Understanding Your XA and XS Reports	8/2/2007	10:00 AM	1 hour	All Business Partners
Payor Agreement Library	8/9/2007	10:00 AM	1 hour	All Business Partners
Logging SAGE Web Cases	8/16/2007	10:00 AM	1 hour	All Business Partners
Registration Overview	8/30/2007	10:00 AM	1 hour	All Business Partners

## 12.10. Communication Options

From the Support item on the navigation bar, click on the Communication Options option to display the Communication Options page.

RelayHealth offers a variety of secure, HIPAA-friendly data transmission options to meet our customers' needs. Whether you're performing 'traditional' transactions like batch claims submission, or using our 'real-time' offerings like Eligibility or Address and Credit, our communications services connect you with RelayHealth.

The Communication Options page contains the following information:

- Communication Options
- Software Downloads

### Communication Options

#### Solutions to Secure Transmissions of PHI

The Transaction Solutions Hub offers a variety of secure, HIPAA-friendly data transmission options to meet our customers' needs. Whether you're performing "traditional" transactions like batch claims submission, or using our "Real-Time" offerings like Eligibility or Address Checking, Communications Services connect you with the Transaction Solutions Hub.

#### Enhancing Your "Communications Skills"

- InfoExchange® HTTPS Client**  
A Java-based client that handles your batch submissions and downloads and sends your data securely over the Internet. Automate transmits to eliminate daily manual processes. No need for technical assistance to navigate firewalls. Patient Health Information (PHI) is encrypted from your system to the Transaction Solutions Hub, so you know your patients' data is safe.
- InfoExchange® Web Link**  
Our web-based application makes it easy to upload and/or download data to the Transaction Solutions Hub using a standard web browser application like Microsoft Internet Explorer.
- InfoExchange® Dial-Up**  
InfoExchange dial-up is a modem to modem communication option that can be scripted for automated processing and has a easy to use graphical interface. It is based on the stable Kermit protocol transfer method, uses file compress for increased speed of transfers and is easy to install on your local computer.

### Software Downloads

- Compress
- CyCom
- InfoExchange HTTPS Java Client
  - UNIX -Windows
- Kermit
- Nortel Contivity (VPN)
- Transaction Transmit (VAN) v2.01

## 12.11. Documentation

From the Support item on the navigation bar, click the Documentation item to display the Documentation page. The Documentation page contains the following information:

- Frequently Asked Questions

Get most of your 'Frequently Asked Questions' answered here. Please feel free to e-mail us with any additional questions that would be beneficial.

- EDI Specifications

There are four extremely valuable tools to enable successful electronic data exchange to RelayHealth.

The screenshot displays the RelayHealth Collaboration Compass website. The top navigation bar includes links for Home, Registration, Claims, Verification, Payor, Alerts, Support, and Contact Us. The 'Support' link is highlighted. The main content area is divided into two columns. The left column, titled 'Frequently Asked Questions', contains a paragraph and two bullet points: 'Eligibility FAQ' and 'Transactions Solutions Hub FAQ'. The right column, titled 'EDI Specifications', contains four bullet points: 'Transaction Solutions ASC X12N V.4010 Companion Document', 'Transaction Solutions Real-Time Eligibility Guide', 'Transaction Solutions Reference Guide', and 'Transaction Solutions Specifications Guide'. The footer of the page shows the copyright notice '© 2006 McKesson Corporation' and a 'Privacy Policy' link.

## 14. Contact Us

From the main navigation menu, click the Contact Us item to contact RelayHealth support regarding enrollment, testing, or support issues.

The Contact Us page contains the following information:

- Product Support
- Contact RelayHealth