

Using the Payor Agreement Library

Introduction

The purpose of this chapter is to provide instruction to users of the Payor Agreement Library.

Application Prerequisites

Each RelayHealth customer must designate a Master Customer User Manager. The Master Customer User Manager sets up any users at their facility needing access to the Payor Agreement Library.

Adobe Reader 7.0 or higher must be installed on all machines used by Agreement Users.

Accessing the Payor Agreement Library

To access the Payor Agreement Library, users will need to be logged into Collaboration Compass™. Access Collaboration Compass™ with the following url: <http://www.collaborationcompass.com/>

1. Login to Collaboration Compass™ by clicking **Login**
2. Enter the appropriate **User ID** and **password**; click **Login**.
3. Select the link to the **Payor Agreement Library** under the **Payor** menu.
4. Another way is to add the Payor Agreement Library portlet to the homepage.

Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://portal.transactions.mckhbc.com/portal/site/CollaborationCompass/template.PAGE/menuitem.241c1bdf6d05d72c6165750210000f7/?javax.portlet.begCacheTok=com.vignet> Go

RelayHealth Collaboration Compass You are logged in as [My Account](#)

Home Registration Claims Verification **Payor** Alerts Support Contact Us Internal

Personalize Content Layout **Payor Agreements**

Payor Agreements Library

There are many benefits of using the Transaction Solution Hub's Electronic agreement library. Including: Customized workflow management which insures efficient submission of payor specific forms, reducing enrollment timeframes; Real-Time editing which reduces submission errors; Reduced shipping and handling costs; Access for completing forms can be setup at either the provider or customer level.

Payor Agreements Library

Important News

- June 08, 2007 **RelayHealth Notify:** Agreements: CPID 7477 Medicare DME MAC

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.

RelayHealth will enable healthcare providers, payors, pharmacies, and patients to interact with each other more easily, streamline financial and clinical transactions, and collaborate to improve the quality of care.

Payor Search

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

Elig. Payor ID:

CPID:

State:

Claim Type:

Insurance:

Payor Name:

Reset Search

Search for an Agreement

The library may be searched in two ways:

1. If users know the correct payor CPID or Payor ID, they may search for the agreement by completing the first section and selecting the agreement type.
2. If users do not know the CPID or Payor ID, they may search for the agreement in the second section by agreement type and a payor's state, name, etc...

Opening the Agreement

The agreement will open within the web browser window.

If users do not have their Adobe Acrobat or Adobe Reader open, it will load before the agreement appears in the window.

The length of time required to load the agreement depends on the size of the agreement and on the speed of the user's network or internet connection.

Agreements Generate New Agreements

relayedu

TSH Website

New Agreement

Search Existing

Agreements Reports

Logout

You cannot save data typed into this form. Please print your completed form if you would like a copy for your records.

Print Form Highlight fields Highlight required fields

RelayHealth

Payor Agreement Cover Sheet
Agreement Type: Claims

Intermediary Noridian Mutual Insurance Company

<input type="checkbox"/> CPID 1438	Iowa Medicare - Professional	<input type="checkbox"/> CPID 2453	North Dakota Medicare - Professional
<input type="checkbox"/> CPID 1446	Nevada Medicare - Professional	<input type="checkbox"/> CPID 2454	South Dakota Medicare - Professional
<input type="checkbox"/> CPID 1449	Colorado Medicare - Professional	<input type="checkbox"/> CPID 2458	Utah Medicare - Professional
<input type="checkbox"/> CPID 1455	Alaska Medicare - Professional	<input type="checkbox"/> CPID 2466	Wyoming Medicare - Professional
<input type="checkbox"/> CPID 1456	Arizona Medicare - Professional	<input type="checkbox"/> CPID 2467	Hawaii Medicare - Professional
<input type="checkbox"/> CPID 1459	Oregon Medicare - Professional	<input type="checkbox"/> CPID 7400	Montana Medicare - Professional
<input type="checkbox"/> CPID 1462	Washington Medicare - Professional		

Special Instructions: Agreement may be faxed to RelayHealth 916-267-2963.

Submitter ID _____

Completing the Agreement Coversheet

1. Complete the Submitter ID field.
 - a. The Submitter ID must be six numerics; if the Submitter ID is shorter, prefill with zeros.
 - b. Users may only submit agreements under their own Submitter number unless additional access is granted by an Administrator.
 - c. Users will receive an error message if they attempt to use a Submitter ID to which they are not linked.

After the user exits the Submitter field, the application will:

 - d. Verify that users have permission to create an agreement under the Submitter ID entered.
 - e. Automatically pull and prefill the Submitter ID's corresponding Name, Customer ID, and Billing ID.
 - f. Move the user to the next required field, Customer Contact.
2. The Customer Contact and E-mail fields are required.
3. The E-mail field is scripted to verify a correctly formatted address.

After completing the Agreement coversheet, the user may tab or click to the next agreement field.

Completing the Agreement

The agreement will be populated with checkboxes, blank fields, drop down boxes, pre-filled RelayHealth information, and hints for completing the agreement.

Tool Tips

The RelayHealth Registration team has built in hints for each field to allow for easier completion. To show the hint, or tool tip, for each field, simply mouse over the field.

- If there is a specific format combination required for the field, it is noted in the tool tip.
- The tip will generally appear directly below the mouse.

Visible but not printed fields

The RelayHealth Registration team has created specific fields with special notes.

These fields are designated by their special lavender background color.

The most common visible but not printed field notifies users when a signature is required on the agreement.

Agreements Generate New Agreements

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Please print your completed form if you would like a copy for your records.

Print Form Highlight fields Highlight required fields

evidence of transmittal.

C. Signature

I am authorized to sign this EDI Enrollment Form on behalf of the indicated party and I have read and agree to the foregoing provisions and acknowledge same by signing below.

Support Analyst (123) 456-7890
Provider's Name Telephone Number

12345
Medicare Provider/Group Number

CEO
Title

700 Locust St.
Address

Dubuque IA 52002
City/State/Zip

Complete agmt, submit, print, and obtain signature. ←

Authorized Signature

CEO
Title

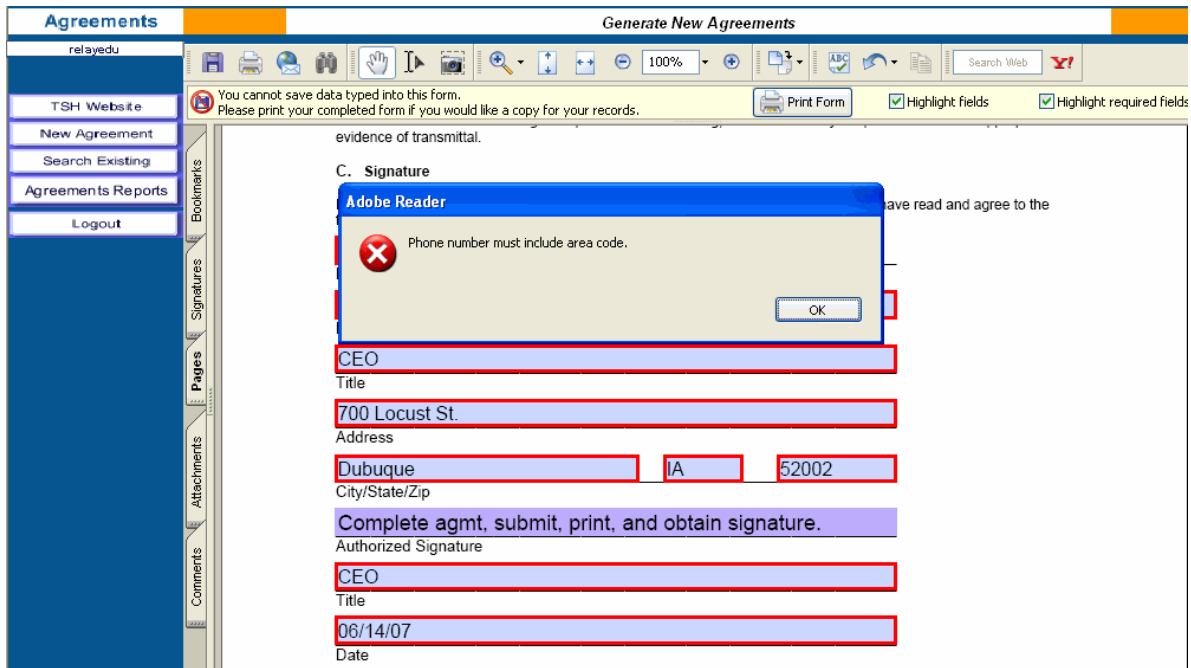
06/14/07
Date

Edited Fields

All agreements have fields with built in edits. These edited fields will give the user immediate errors upon leaving the field if completed incorrectly. After pressing the OK button on the error, the application will return the user to the incorrect field for correction.

Commonly Edited Fields:

- Provider ID
- Telephone & Fax Numbers
- Email Address
- State in Provider Address
- Date
- Zip Code



Whenever possible, the RelayHealth Registration team has pre-filled any RelayHealth information required by the payor.

Users will be unable to change any pre-filled RelayHealth information within the Agreement.

Reset/Submit Buttons

If users ever need to clear all the fields on the agreement, they may do so by going to the end of the agreement and click the Reset button. The Reset button will return all fields to their defaults, including the CPID choice on the coversheet, if applicable.

When the agreement is complete, submit the agreement to have all edits checked by clicking the Submit button at the end of the agreement.

The screenshot shows a web browser window with the title 'Generate New Agreements'. The browser's address bar shows 'relayedu'. The page has a blue sidebar with navigation links: 'TSH Website', 'New Agreement', 'Search Existing', 'Agreements Reports', and 'Logout'. The main content area contains a form with the following fields and values:

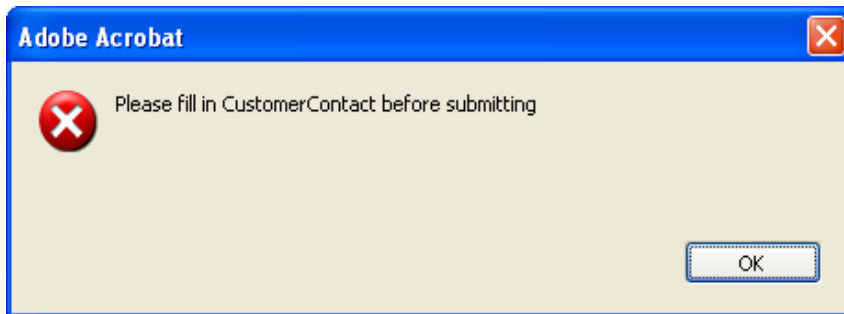
- Provider's Name: Support Analyst
- Telephone Number: (23) 456-7890
- Medicare Provider/Group Number: 12345
- Title: CEO
- Address: 700 Locust St.
- City/State/Zip: Dubuque IA 52002
- Authorized Signature: CEO
- Date: 06/14/07

Below the form, there is a note: "NOTE: Please send both pages of this completed EDI Enrollment Form to EDI Support Services at PO Box 9319, Fargo, ND 58106-9319." and two buttons: 'Submit' and 'Reset'.

Submitting the Agreement

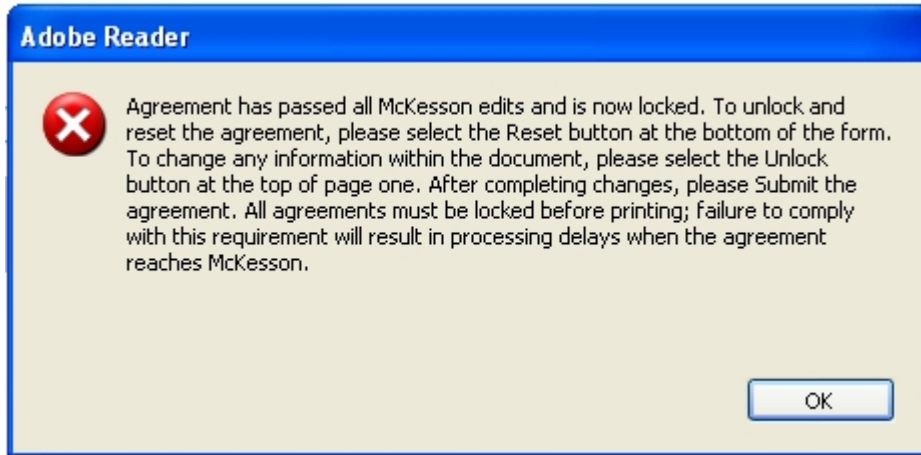
One of the key things verified when users submit the agreement is that all required fields have been completed. If a required field has not been completed, an error will appear stating that the required field must be filled in.

After users click the OK button on the error, the application will return the user to the field that needs completion.



After an agreement has passed all RelayHealth edits, all fields are locked and the following window will appear.

Agreements must be printed while locked to ensure they will be processed correctly.



Unlock Button

1. To edit field content, please click the **Unlock** button.
2. Click the **Submit** button after completing changes to the agreement to verify all fields have been completed correctly.

Agreements Generate New Agreements

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You cannot save data typed into this form.
Please print your completed form if you would like a copy for your records.

Print Form Highlight fields Highlight required field

RelayHealth **AUTO-VALIDATED**

UNLOCK Payor Agreement Cover Sheet
Agreement Type: Claims

Intermediary Noridian Mutual Insurance Company

<input checked="" type="checkbox"/> CPID 1438	Iowa Medicare - Professional	<input type="checkbox"/> CPID 2453	North Dakota Medicare - Professional
<input type="checkbox"/> CPID 1446	Nevada Medicare - Professional	<input type="checkbox"/> CPID 2454	South Dakota Medicare - Professional
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<input type="checkbox"/> CPID 1459	Oregon Medicare - Professional	<input type="checkbox"/> CPID 7400	Montana Medicare - Professional
<input type="checkbox"/> CPID 1462	Washington Medicare - Professional		

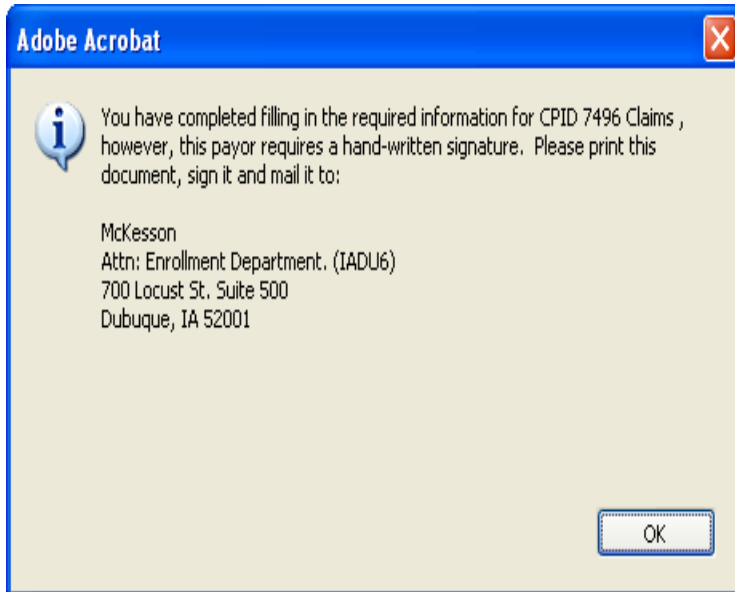
Special Instructions: Agreement may be faxed to RelayHealth 916-267-2963.

Submitter ID 999997

Printing Agreements

Many payors require signatures on their agreements. After completing and submitting an agreement that requires a provider signature, a notice will appear to the user instructing them to print the form.

RelayHealth's address is located on the coversheet of the form, after signing the agreement; the provider should forward it to RelayHealth.



Auto-Validated Stamp

Agreements completed on line and submitted for validation by the system, will be stamped with an Auto-Validated stamp. The stamp indicates that all required information has been completed and all field values are valid. Auto-Validated stamped agreements receive first priority with regards to document review and processing to the payor. Ensure your documents receive the highest priority by clicking the Submit button at the end of the agreement.

Agreements Generate New Agreements

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Print Form Highlight fields Highlight required field

AUTO-VALIDATED

RelayHealth

UNLOCK

Payor Agreement Cover Sheet
Agreement Type: Claims

Intermediary Noridian Mutual Insurance Company

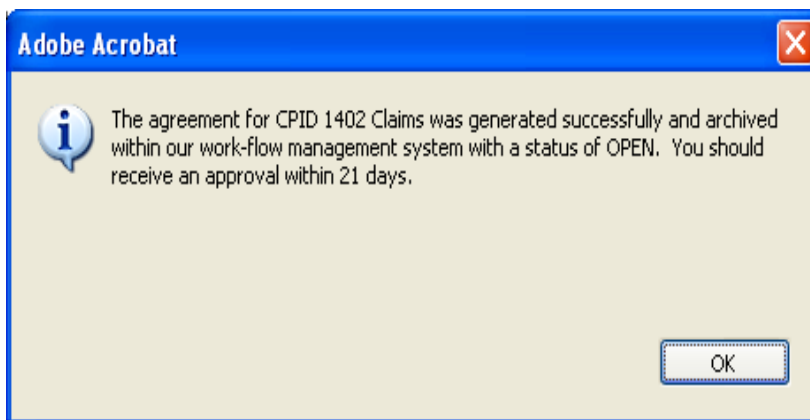
<input checked="" type="checkbox"/> CPID 1438	Iowa Medicare - Professional	<input type="checkbox"/> CPID 2453	North Dakota Medicare - Professional
<input type="checkbox"/> CPID 1446	Nevada Medicare - Professional	<input type="checkbox"/> CPID 2454	South Dakota Medicare - Professional
<input type="checkbox"/> CPID 1449	Colorado Medicare - Professional	<input type="checkbox"/> CPID 2458	Utah Medicare - Professional
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<input type="checkbox"/> CPID 1456	Arizona Medicare - Professional	<input type="checkbox"/> CPID 2467	Hawaii Medicare - Professional
<input type="checkbox"/> CPID 1459	Oregon Medicare - Professional	<input type="checkbox"/> CPID 7400	Montana Medicare - Professional
<input type="checkbox"/> CPID 1462	Washington Medicare - Professional		

Special Instructions: Agreement may be faxed to RelayHealth 916-267-2963.

Submitter ID 999997

Electronic Agreements

Agreements that do not require a provider signature will be submitted electronically to RelayHealth when users click the Submit button. The agreements submitted electronically to RelayHealth will immediately move into RelayHealth's document management system.



Multiple CPID's on Agreement

If the agreement covers multiple CPID's, the user must first select the appropriate CPID. The system will not allow providers to complete and submit one agreement with multiple CPID's checked. To submit an agreement for more than one CPID, select a CPID and submit the agreement, then unlock the agreement, select the additional CPID and submit again.

Repeat these steps as many times as necessary.

Agreements Generate New Agreements

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You cannot save data typed into this form.
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Print Form Highlight fields Highlight required fields

 **Payor Agreement Cover Sheet**
Agreement Type: Claims

Intermediary Noridian Mutual Insurance Company

<input type="checkbox"/> CPID 1438	Iowa Medicare - Professional	<input type="checkbox"/> CPID 2453	North Dakota Medicare - Professional
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Special Instructions: Agreement may be faxed to RelayHealth 916-267-2963.

Submitter ID _____

Payor Agreement Tips

- Do not save copies of agreements. The only way to guarantee all edits have been checked is to complete the agreement online.
- The most updated agreement is available online.
- Agreement cover sheets with multiple CPID's require a submission for each CPID.
- Mouse over fields to see tool tips about the requirements for the field.
- Before printing, always, complete the agreement and click the Submit button.

Assistance and Additional Forms

Assistance

For assistance using the Payor Agreement Library, please see the Prerequisite and FAQ documents which may be accessed from the search page.

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Payor Agreement Library

View Agreements

CPID / Payor ID: ** *

Agreement Type: *

Agreement Library Help Files:

[Prerequisites](#) :: Machine requirements

[Agreements Library FAQ](#) :: Setup and basic usage

[Customer Response Form](#) :: Feedback for us?

Search Agreements

State Code:

Payor Name:

Claim Type:

Agreement Type: *

Insurance Type:

Other Forms:

[Address/Credit Verification](#) :: Required paperwork

[Add Payor Form](#) :: Add Payors to Eligibility Submitter***

* Required to complete entries

** To search by Payor ID, the 'Eligibility' Agreement Type must be selected

*** Available for contracted and registered Eligibility customers only

Additional Forms

The following additional forms may also be accessed from the search page:

- Eligibility Add Payor form (for existing eligibility clients only)
- Address and Credit Verification

Agreements Generate New Agreements

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- Agreements Reports
- Logout

Payor Agreement Library

View Agreements

CPID / Payor ID: ** *

Agreement Type: *

Agreement Library Help Files:

[Prerequisites](#) :: Machine requirements

[Agreements Library FAQ](#) :: Setup and basic usage

[Customer Response Form](#) :: Feedback for us?

Search Agreements

State Code:

Payor Name:

Claim Type:

Agreement Type: *

Insurance Type:

Other Forms:

[Address/Credit Verification](#) :: Required paperwork

[Add Payor Form](#) :: Add Payors to Eligibility Submitter***

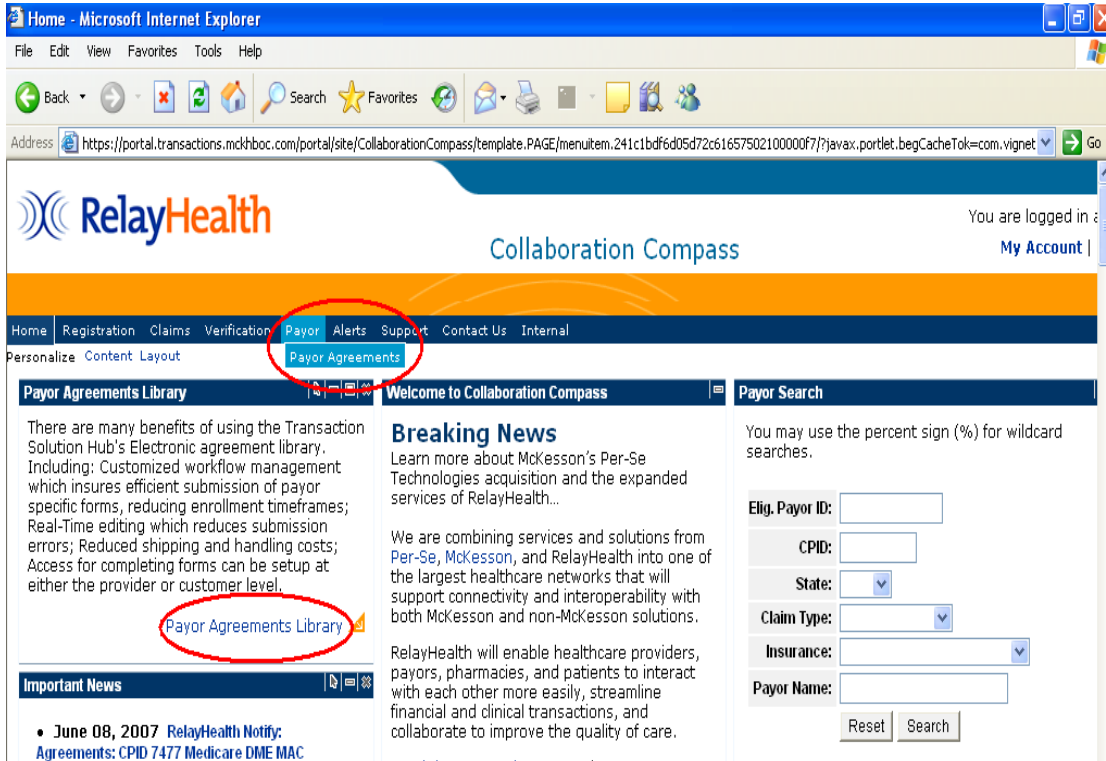
* Required to complete entries

** To search by Payor ID, the 'Eligibility' Agreement Type must be selected

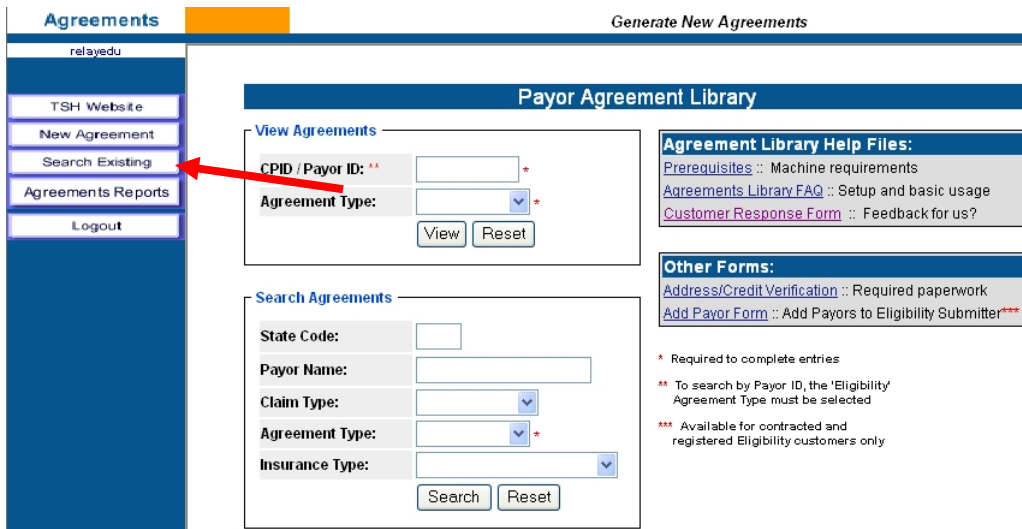
*** Available for contracted and registered Eligibility customers only

Accessing the Agreement Viewer

1. Login to the portal Website: www.collaborationcompass.com.
2. Select the link to the **Payor Agreement Library** under the **Payor** menu.
3. Another way is to add the **Payor Agreement Library** portlet to the homepage.



4. To access the Agreement Viewer, select **Search Existing** from the menu on the left of the screen.



Agreement Viewer Features

Features that are available via the agreement viewer are the following:

- Type of document (claims, remittance, eligibility)
- Status of the document
- Submitter number and name
- CPID and payor name
- Exporting of information to a csv file
- Able to read notations and how many on a document
- Ability to sort report by variety of fields
- Number of pages in a document
- Provider ID
- Important dates: received, completed, follow-up and mailed

Viewing Documents

1. Click the type of document to search on or leave blank to search all types:
 - a. Claims
 - b. Remittance
 - c. Eligibility
2. Enter any valid search criteria from the choices listed and click on the **Submit** button.
3. The Biller ID and Submitter ID fields are only visible for users assigned the Master Agreement User role.

Payor Agreements - Microsoft Internet Explorer provided by McKesson Corporation

Address: https://agreements.transactions.mckhbc.com/Agreements/viewer.html

MCKESSON

Agreements Transaction Solutions Hub Payor Agreement Search

Agreement Type: Claims Remittance Eligibility

Status: ALL

Biller ID: 999999

Submitter ID: 999999

Submitter Name: [Dropdown]

CPID: [Dropdown]

Payor Name: [Text]

Format for all dates: MM/DD/YYYY

Follow Up Date start: [Text] end: [Text]

Date Received start: [Text] end: [Text]

Date Completed start: [Text] end: [Text]

Size (px) Width: 800 Height: 1111

Submit

4. A display of documents matching the search criteria is listed.
5. Double-click the **PDF** icon to open the document.
6. Double-click the **Note** icon to view notes.

Payor Agreements - Microsoft Internet Explorer provided by McKesson Corporation

Address: https://agreements.transactions.mckhbc.com/Agreements/viewer.html

McKESSON Transaction Solutions Hub Payor Agreement List

View	Type	Status	Submitter	Submitter Name	CPID	Payor Name	Pages	Notes	Dates
	Claims	CLOSED	000000	OBSTETRICS & GYNECOLOGY CONSULTANTS, PC	1443	RETIRED RAILROAD MEDICARE	5	(1)	Received 2-8-2004 Completed 2-9-2004 Followup 2-8-2004
	Claims	DENIED	000000	LINDA SNOW-GRIFFIN, PHD	2481	OHIO MEDICAID	2		Received 2-4-2004 Completed 2-6-2004 Followup 2-4-2004
	Claims	DENIED	000000	LINDA HOLDER	2415	MISSISSIPPI BLUE SHIELD	6		Received 2-4-2004 Completed 2-6-2004 Followup 2-4-2004
	Claims	DENIED	000000	NORTHWEST LOUISIANA NEPHROLOGY	1475	LOUISIANA MEDICAID	12		Received 1-21-2004 Completed 1-22-2004 Followup 1-22-2004
	Claims	DENIED	000000	MELONIE CHANDLER	1475	LOUISIANA MEDICAID	4		Received 1-21-2004 Completed 1-22-2001 Followup 2-13-2004
	Claims	DENIED	000000	HORIZON MOBILE HEALTH0135697	0000	WEBMD TRANSACTIONS SERVICES	2		Received 1-16-2004 Completed Followup 1-25-2004
	Claims	DENIED	000000	TECHE SURGICAL SPECIALTIES/1572667	1475	LOUISIANA MEDICAID	5	(1)	Received 1-12-2004 Completed Followup 1-30-2004 Received 1-12-2004

Agreement Reports

Daily Approval and Weekly Open Reports can be viewed online by clicking the Agreements Reports button.

Agreements Generate New Agreements

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TSH Website
New Agreement
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Agreements Reports ←
Logout

Payor Agreement Library

View Agreements

CPID / Payor ID: ** *

Agreement Type: *

Search Agreements

State Code:

Payor Name:

Claim Type: ▼

Agreement Type: ▼ *

Insurance Type: ▼

Agreement Library Help Files:

[Prerequisites](#) :: Machine requirements

[Agreements Library FAQ](#) :: Setup and basic usage

[Customer Response Form](#) :: Feedback for us?

Other Forms:

[Address/Credit Verification](#) :: Required paperwork

[Add Payor Form](#) :: Add Payors to Eligibility Submitter***

* Required to complete entries
** To search by Payor ID, the 'Eligibility' Agreement Type must be selected
*** Available for contracted and registered Eligibility customers only

The following screen will be displayed with the options to view or download the Daily Approval Report and/or the Weekly Open Report.

Viewing Agreement Reports

The View button will display (as shown below) the selected report on the screen. Prior business day authorized agreement information based upon the user's user id security access will be displayed; Submitter ID, CPID, provider number, status and date information. In addition, the Daily Approval Report is emailed each morning to a client designated email address. The email has an attachment in a .csv format, which again contains prior business day authorized agreements scoped at the Vendor ID level or Master Agreement User Level.

Daily Approval Report:

Vendor ID	CPID	Product	Payor Name	Submitter ID	Submitter Name	Provider ID	Status	Received Date	Date Corr
999997	1443	Claims	RETIRED RAILROAD MEDICARE	999997	MCKESSON DEMO SUBMITTER	123123123	AUTHORIZED	2007-06-14	2007-06-1

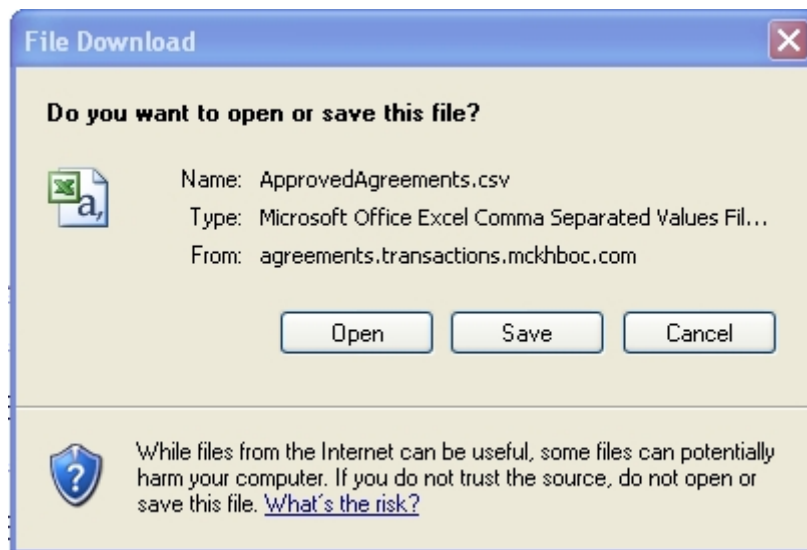
The Open Report viewed online (as shown below) will display all open agreements scoped to the user's user id security access. In addition, this report is emailed every Monday to a client designated email address. The email has an attachment in a .csv format, which contains open agreements scoped at the Vendor ID level or Master Agreement User Level.

Open Report

Vendor ID	CPID	Product	Payor Name	Submitter ID	Submitter Name	Provider ID	Status	Received Date	Follow Up Date
999997	ARCAID	Eligibility	ARKANSAS MEDICAID	999997	MCKESSON DEMO SUBMITTER	N/A	OPEN	2007-06-15	2007-06-19
999997	AZHLCH	Eligibility	HEALTH CHOICE OF ARIZONA	999997	MCKESSON DEMO SUBMITTER	N/A	OPEN	2007-06-15	2007-06-19

Downloading Agreement Reports

The Download button allows you to save the report to your local computer. The reports contain the same information as displayed by the View buttons but in a .csv format. When the Download button is depressed, the following message will be displayed.



The Open button will open the report in Excel and the Save button allows you to save the report to a specific location and format. The report will look like the following when opened in Excel.

	A	B	C	D	E	F	G	H	I	J	K
1	Vendor ID	CPID	Product	Payor Name	Submitter	Submitter	Provider ID	Status	Received	Date Completed	
2	999997	1443	Claims	RETIRED	999997	MCKESSON	1.23E+08	AUTHORIZED	6/14/2007	6/18/2007	
3											
4											

Training

Customer Training

Training is offered to RelayHealth clients and business partners via regularly scheduled webinars. Clients are notified of webinar dates via email. To view a complete list of webinars being offered:

1. Click Support.
2. Click Customer Education/Training.

The screenshot shows the RelayHealth Collaboration Compass interface. The top navigation bar includes 'Home', 'Registration', 'Claims', 'Verification', 'Payor', 'Alerts', 'Support', and 'Contact Us'. The 'Support' menu is expanded, showing sub-items: 'Payor', 'Communication Options', 'Customer Education/Training', and 'Documentation'. The 'Customer Education/Training' item is highlighted in blue. Below the navigation, there is a 'Payor Search' section with various input fields (Elig. Payor ID, CPID, State, Claim Type, Insurance, Payor Name) and a 'Search' button. To the right, there is an 'Important News' section with several news items dated June 18, 2007, and June 13, 2007. At the bottom, there is a 'Breaking News' section with a 'Welcome to Collaboration Compass' message.

Training documentation will be available to RelayHealth clients at any time if they contact RelayHealth Support.

End User Training

RelayHealth Business Partners are responsible for training their own clients on the Payor Agreement Library application.

Training materials are available to assist with client education.

Agreement Updates and Corrections

Immediately after RelayHealth is notified that a payor agreement is changing, the agreement will be pulled from the Payor Agreement Library and replaced with a notification stating that the form is under construction.

When the updated form has been published to the Payor Agreement Library, a customer notify will be sent to clients informing our clients the agreement is available for submission.

If the user finds an error that prevents form submission, please contact the RelayHealth Registration Team.

- Phone: 800-527-8133, option 1
- Fax: 916-267-2963
- Email: DBQTSHErollments@RelayHealth.com

Please have the payor cpid, the page and location of the questionable field, the requested change and any other supporting documentation available when contacting RelayHealth Support.

Customer Feedback and Response Form

To give general feedback or request enhancements to the Payor Agreement Library, please complete the Customer Response Form which may be accessed from the search page.

The screenshot shows the 'Payor Agreement Library' interface. On the left is a navigation menu with 'Agreements' selected. The main content area has a header 'Payor Agreement Library' and two main sections: 'View Agreements' and 'Search Agreements'. The 'View Agreements' section has input fields for 'CPID / Payor ID' (marked with a red asterisk) and 'Agreement Type' (marked with a red asterisk), and 'View' and 'Reset' buttons. The 'Search Agreements' section has input fields for 'State Code', 'Payor Name', 'Claim Type', 'Agreement Type' (marked with a red asterisk), and 'Insurance Type', and 'Search' and 'Reset' buttons. On the right, there are two boxes: 'Agreement Library Help Files' containing links for 'Prerequisites', 'Agreements Library FAQ', and 'Customer Response Form' (highlighted with a red arrow), and 'Other Forms' containing links for 'Address/Credit Verification' and 'Add Payor Form'. A legend at the bottom right explains the asterisks: * Required to complete entries; ** To search by Payor ID, the 'Eligibility' Agreement Type must be selected; *** Available for contracted and registered Eligibility customers only.

After completing the form, please select the Submit button. An email will be generated, addressed to the RelayHealth Registration Team, with the form data attached. The user must select Send in their email application to send the email to RelayHealth.

Adobe Reader



Click okay to automatically generate an e-mail to the McKesson Registration team with the Customer Response Form attached.

While McKesson appreciates all input with regards to the Payor Agreement Library, McKesson is unable to respond to any customer that does not submit directly to McKesson.

OK