Using the Collaboration Compass Site

Introduction

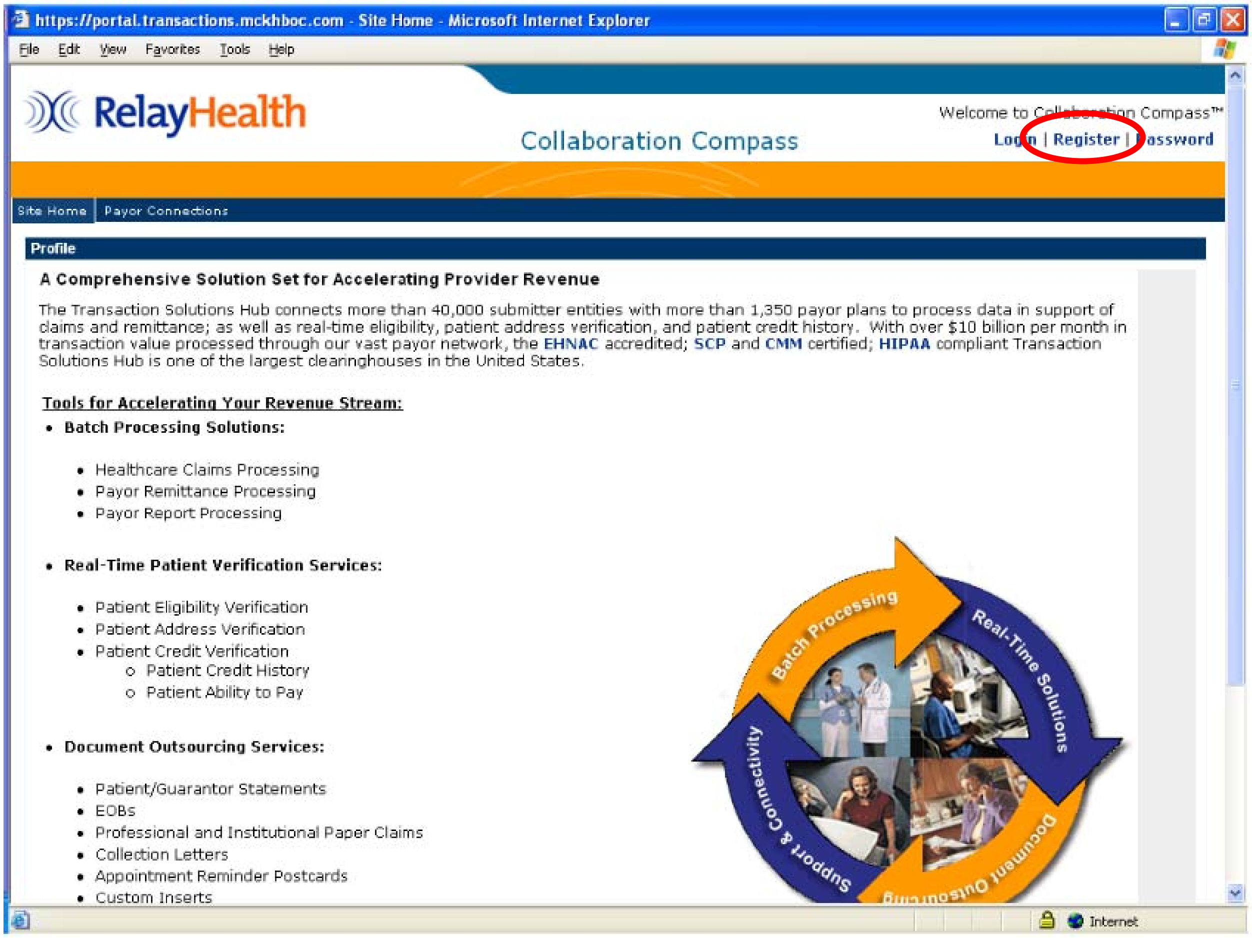
The purpose of this chapter is to overview, introduce, and provide instructions for using the RealyHealth Collaboration Compass™ site.

Of particular importance in this chapter is the section Self Registration. All users will need to complete this process before using the RelayHealth clearinghouse. This step is crucial since you will use the site to complete your payor agreements—detailed in the chapter Using the Payor Agreement Library.

Self Registration

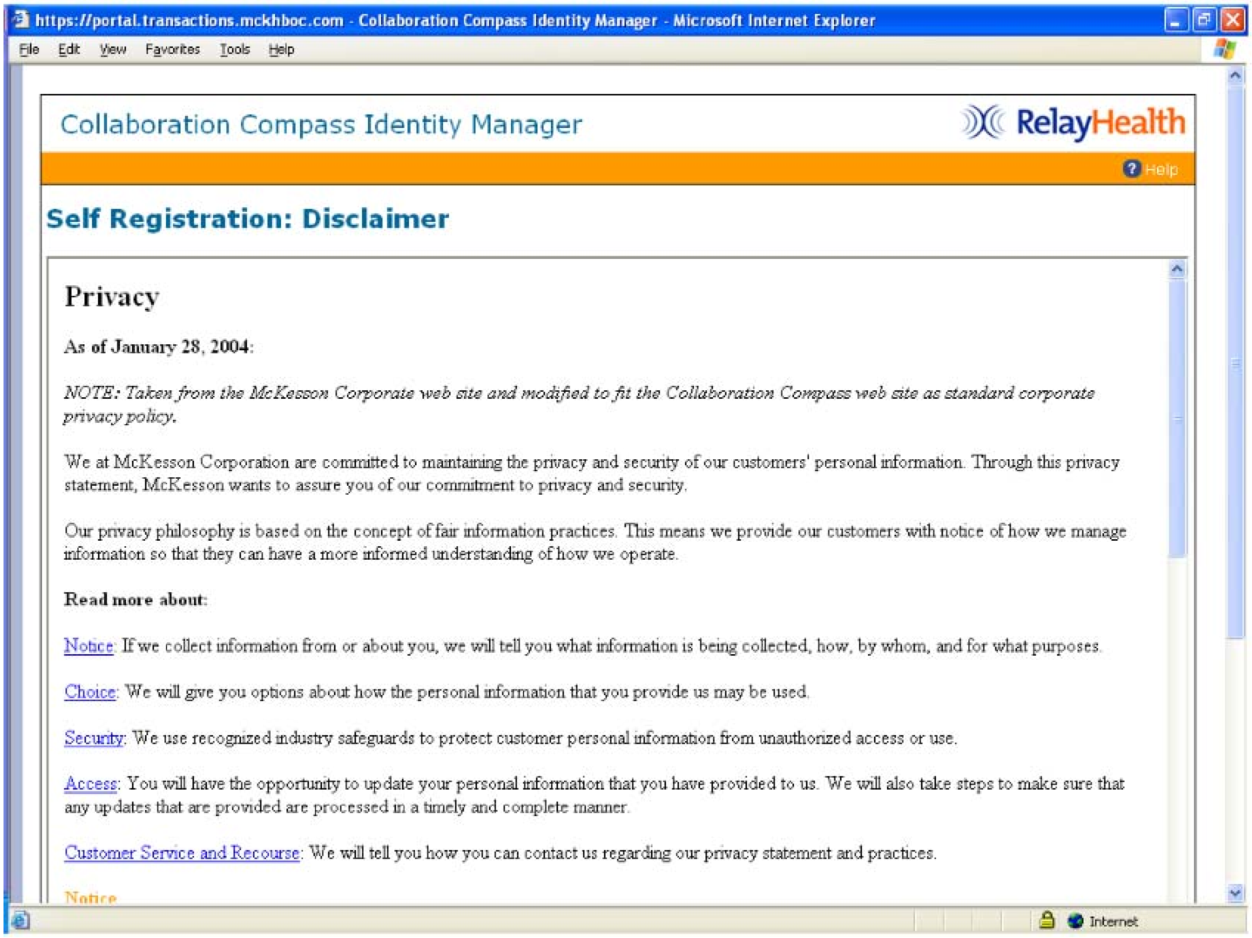
Self-Registration allows new users to register for access to Collaboration Compass™ and corresponding applications.

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



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.

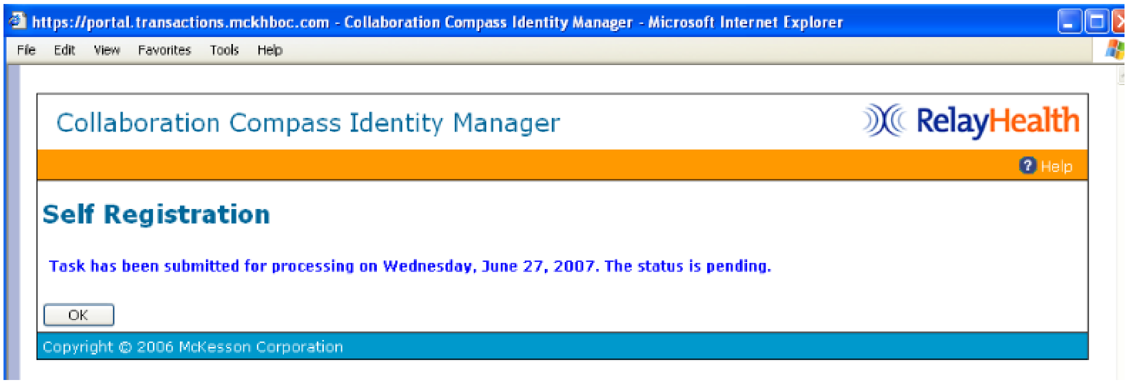
3. Review the disclaimer and click **Accept**, located at the bottom of the page.



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.

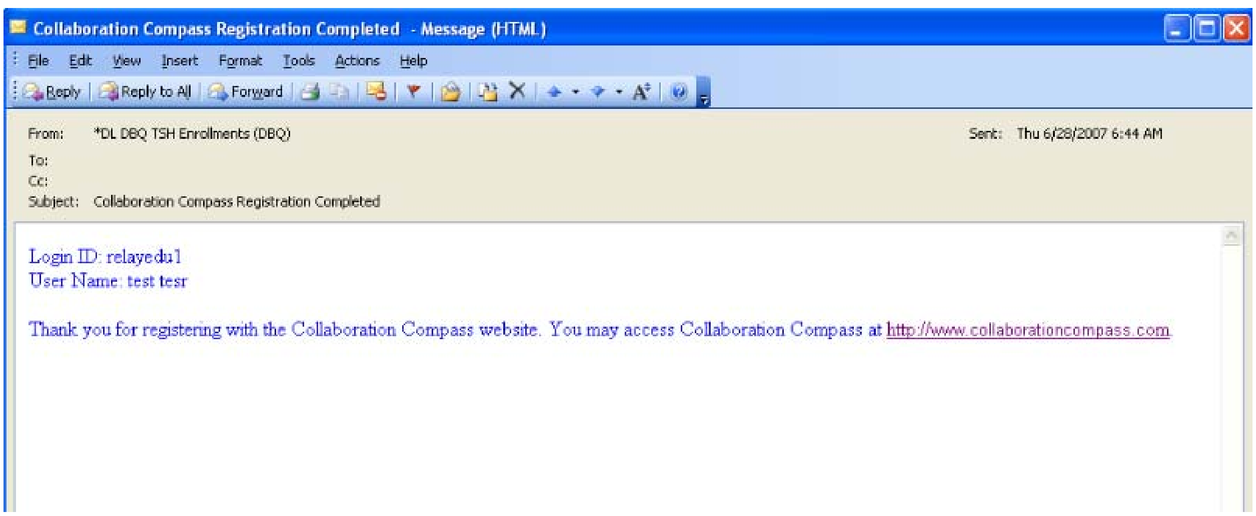
   Note: An invalid Submitter ID will delay approval. Your Submitter ID was send to you by the registration team after your initial enrollment.

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.

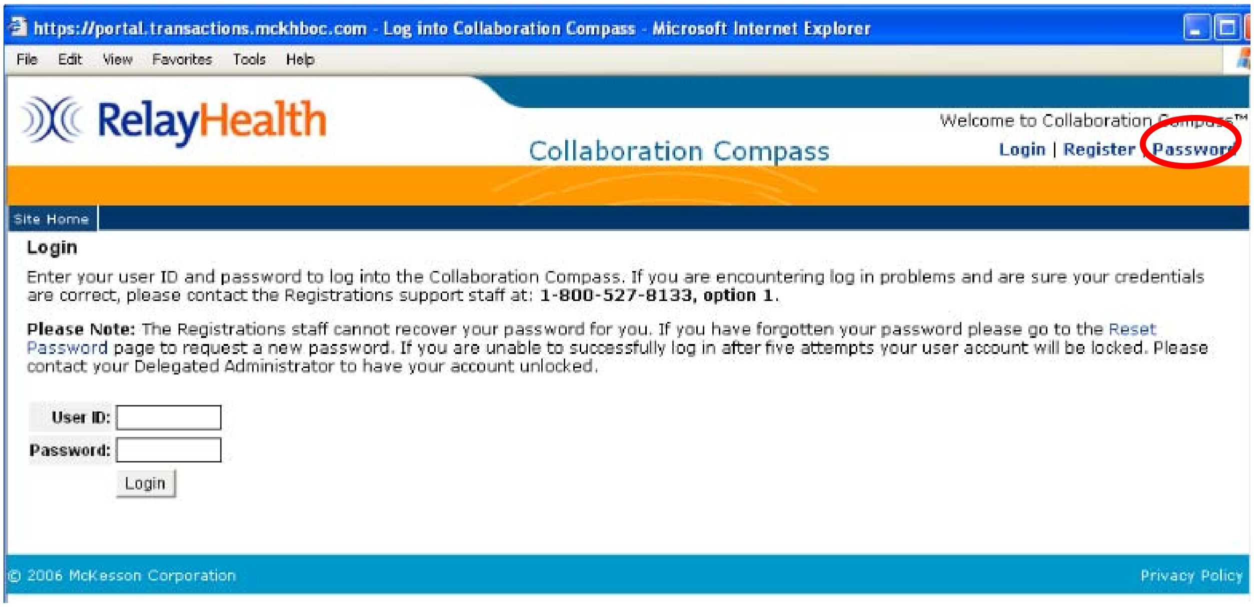
   Upon receipt of the Collaboration Compass Registration Completed email, users will have access to the Collaboration Compass™ and the RelayHealth Payor Agreement Library.



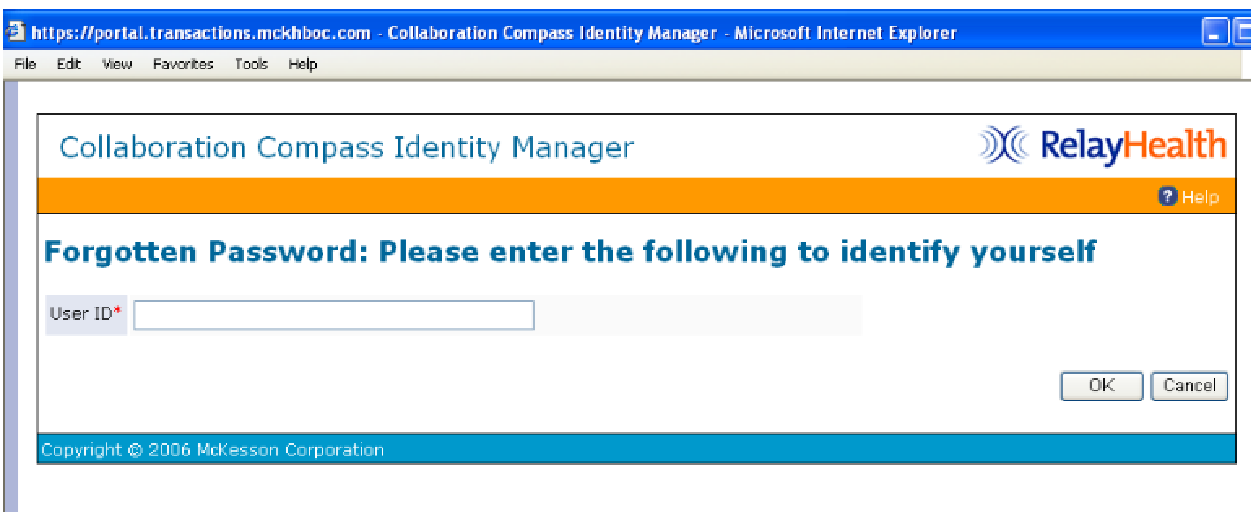
Forgotten Password

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

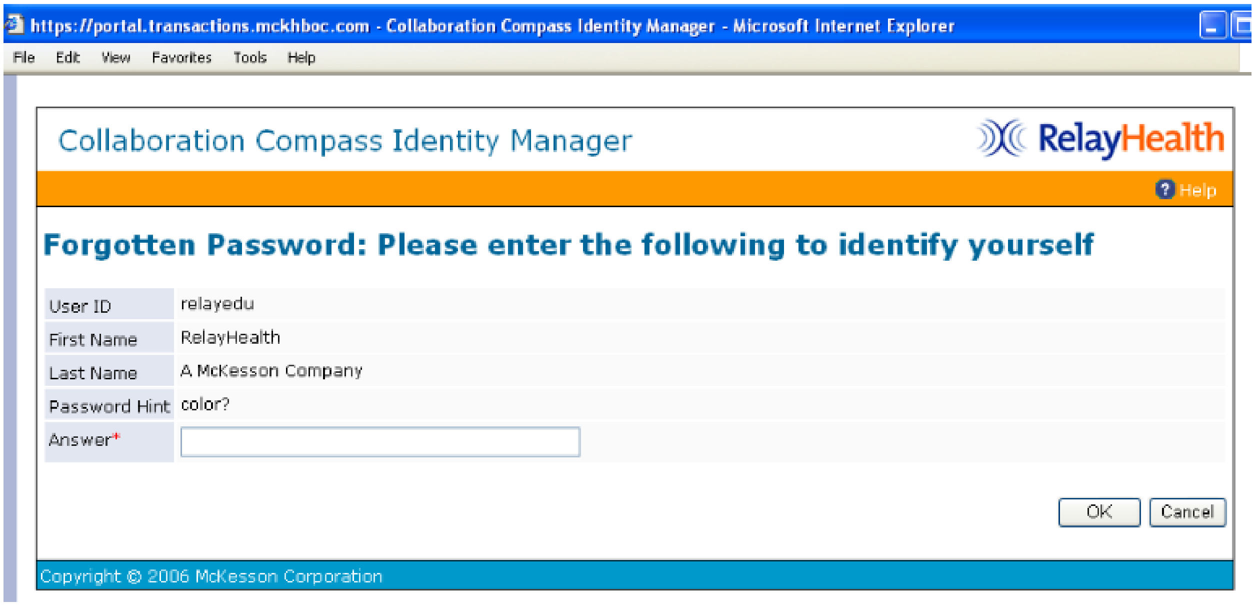
1. Click **Password**.



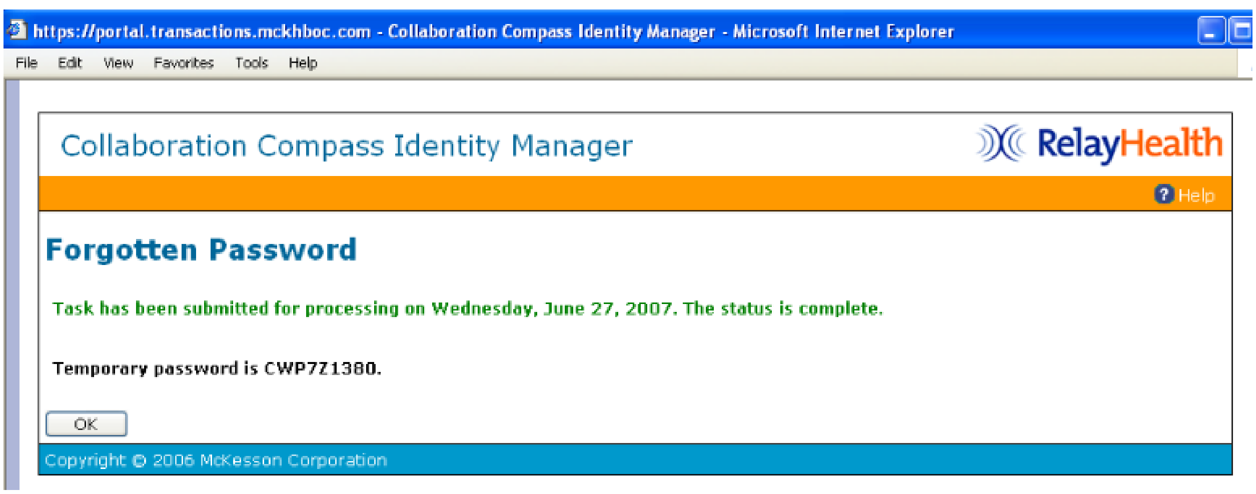
2. Enter the **User ID** and click **OK**.



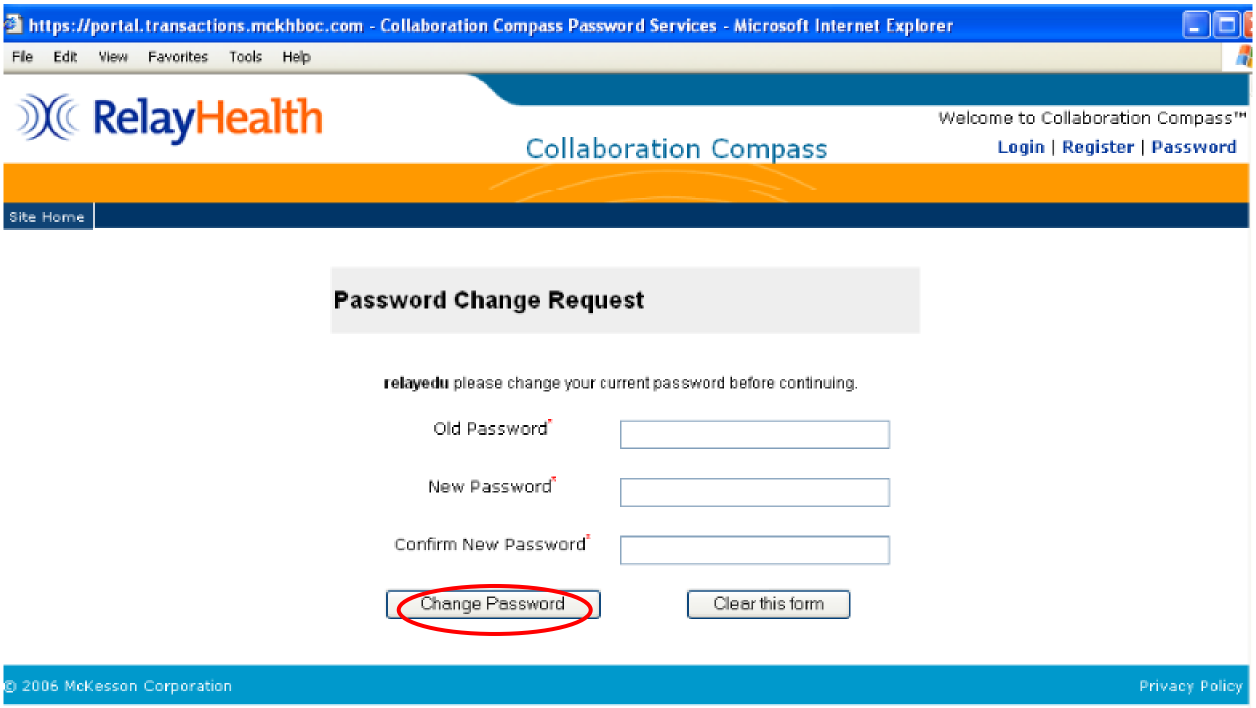
3. Answer the password hint and click **OK**.



4. A temporary password will be displayed; copy the password by pressing and holding down the **CTRL** key + **C**. The password will also be emailed to the address in the user profile.
5. Click **OK** to return to the Collaboration Compass™ login screen.



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



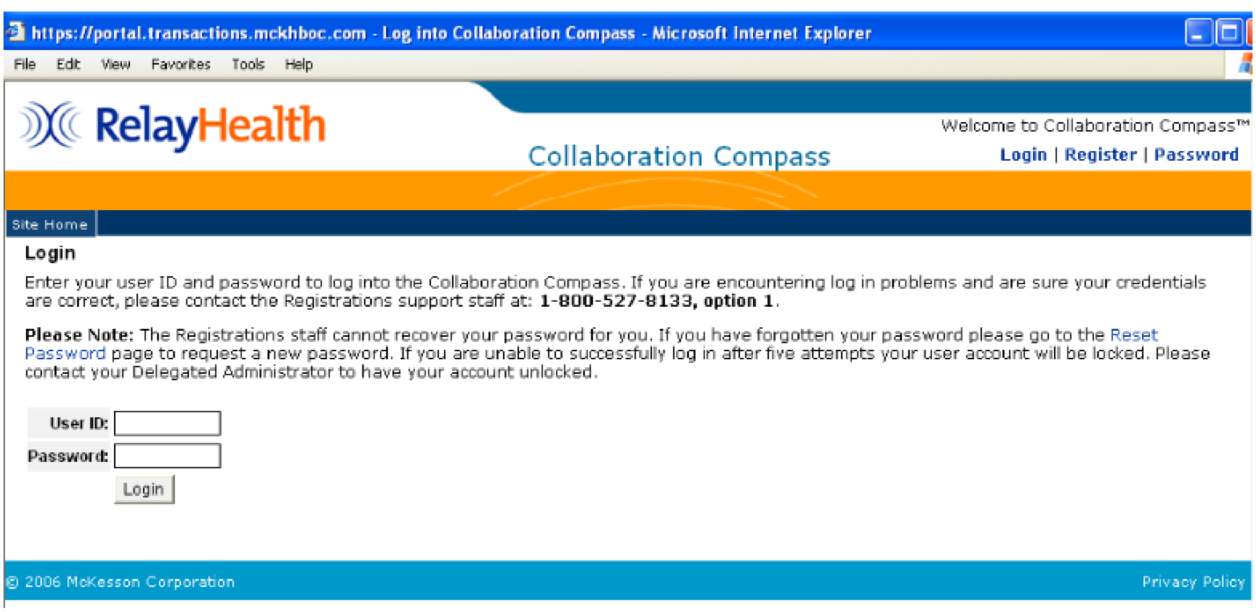
8. Click **Continue** on the next screen.

Accessing Identity Manager

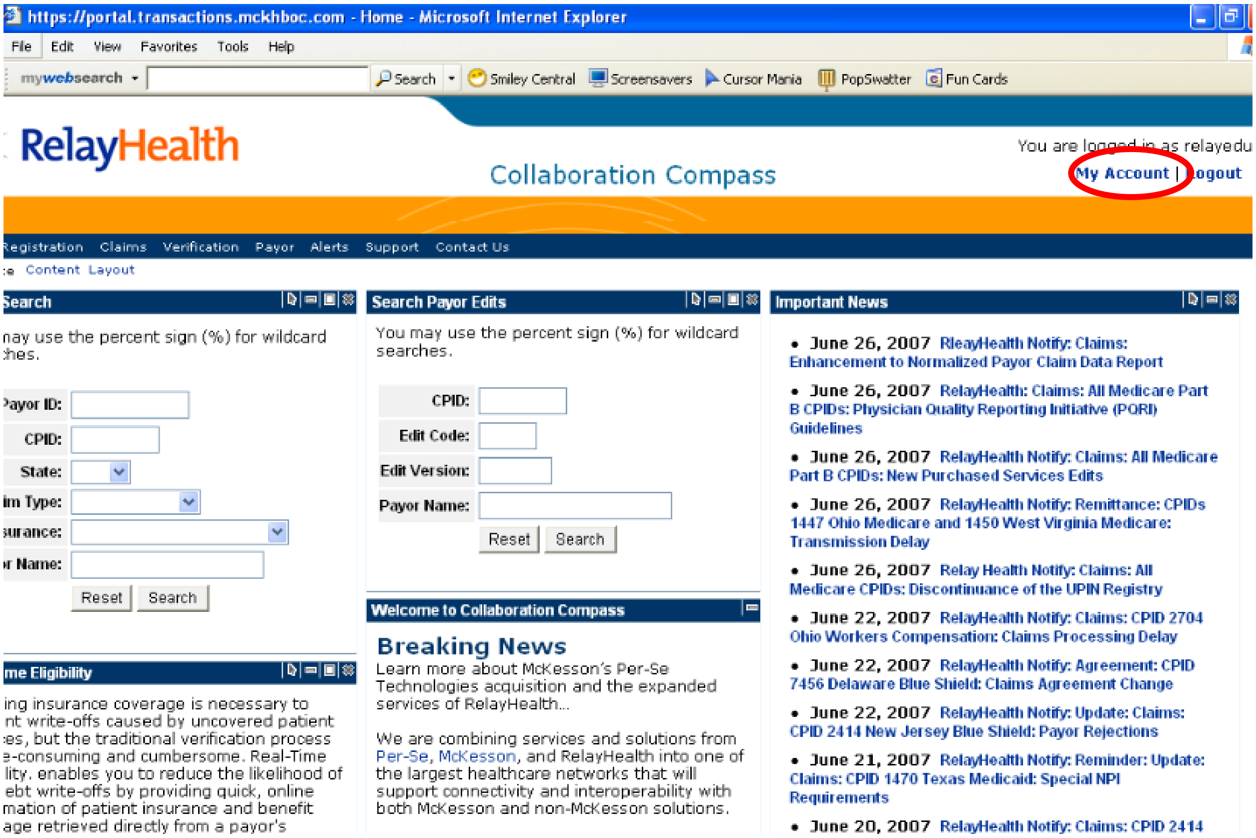
To access Identity Manager users will need to be logged into Collaboration Compass™. Access within Identity Manager is based on the roles assigned within each user's profile.

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.



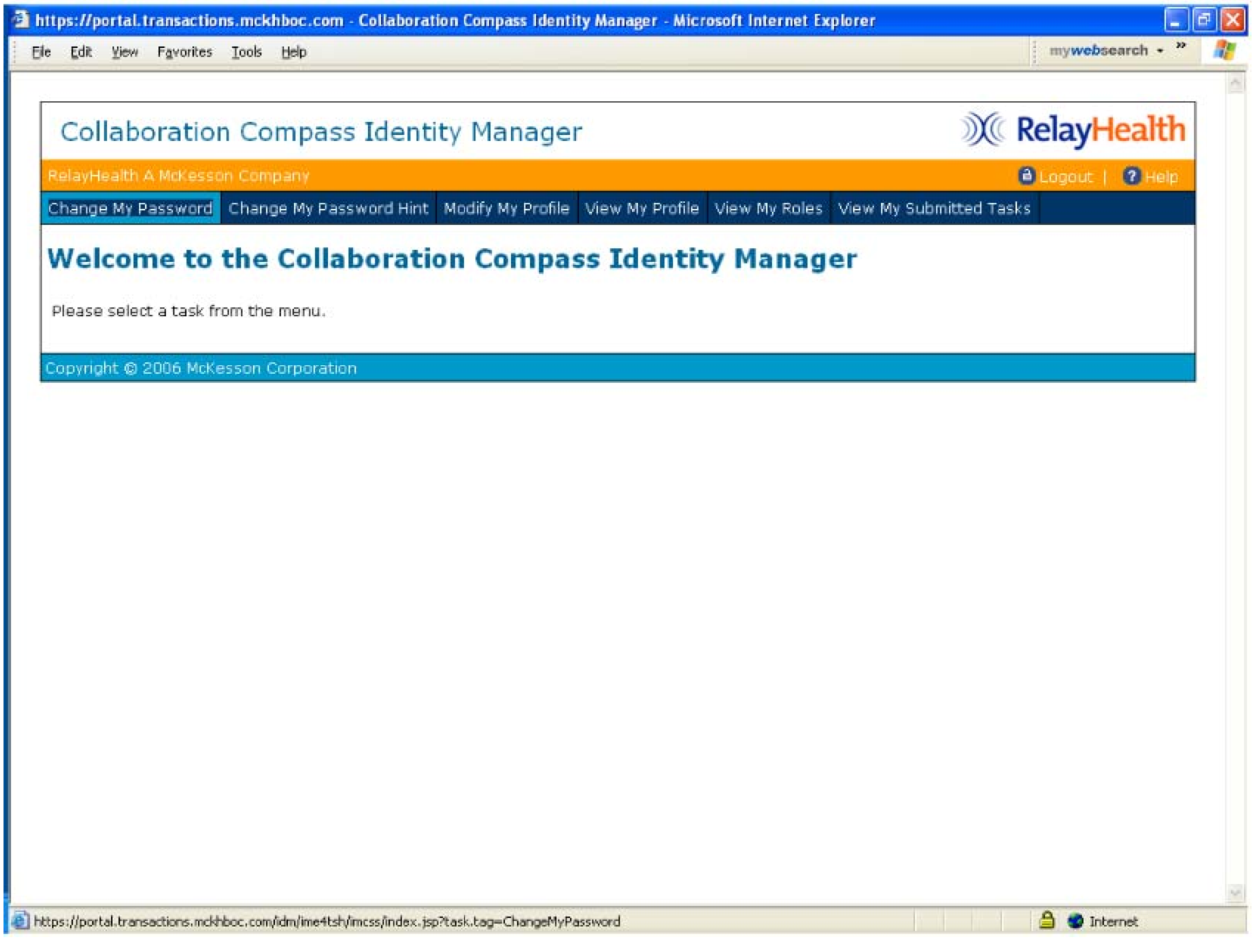
My Account

My Account allows users to view their roles and modify or view their profile and password. Clicking on My Account brings you to the following screen.

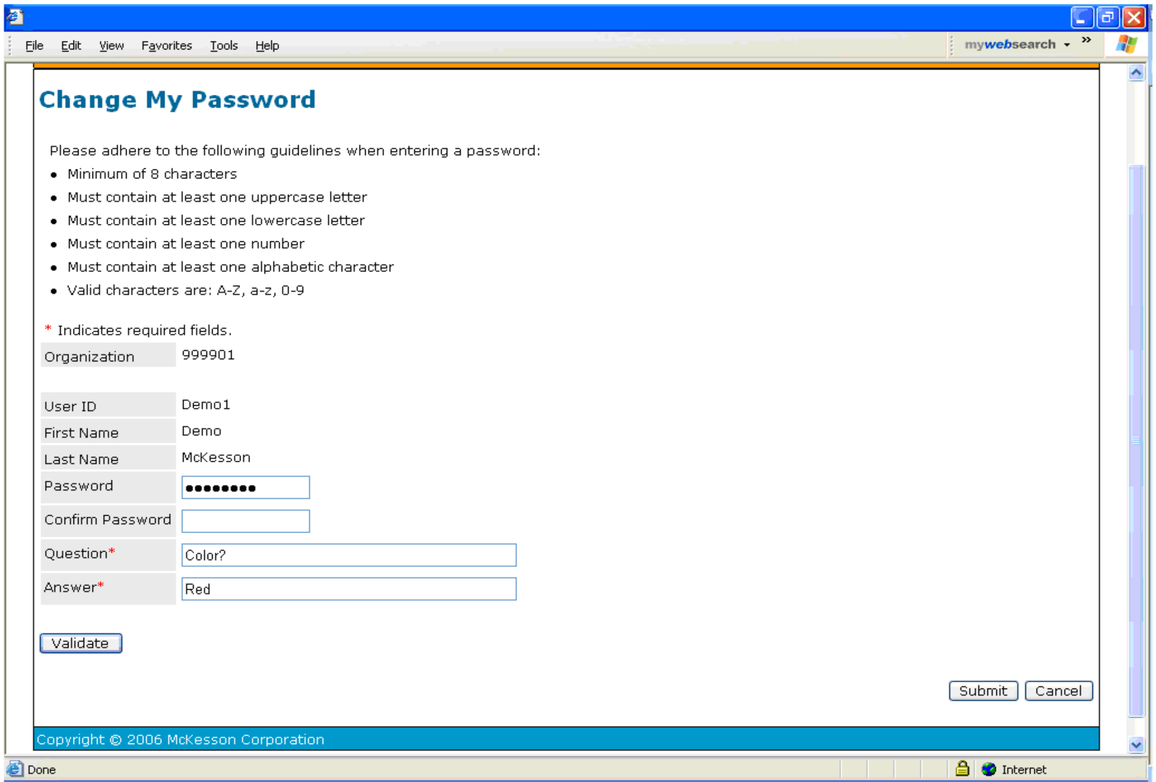
Change My Password

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.

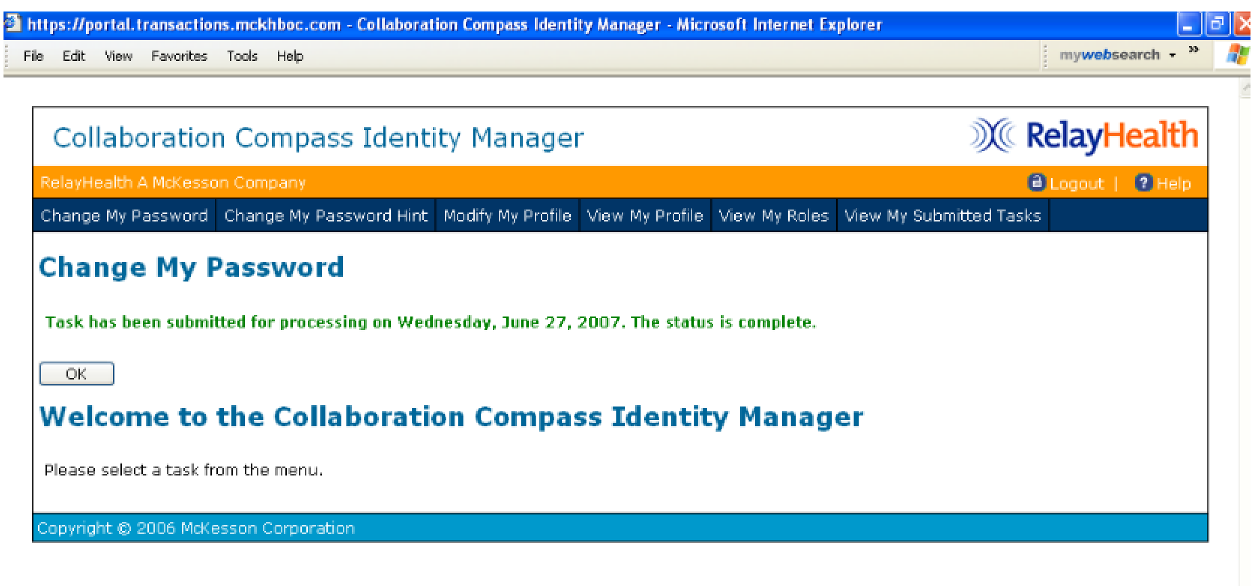
1. Click **Change My Password**.



2. Clear the password field, type in the new password, and retype to confirm.
3. Click **Submit**.



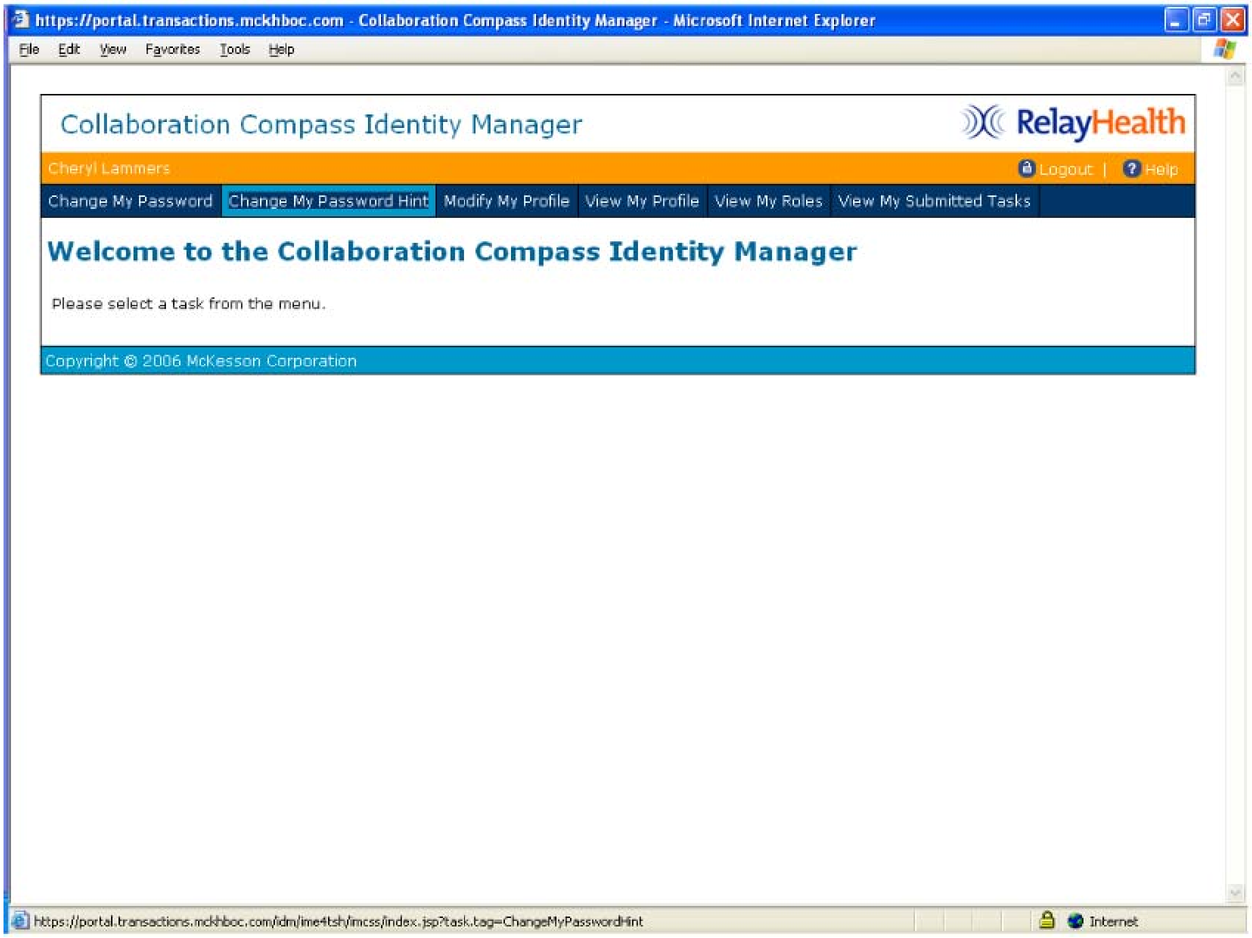
4. Click **OK** to return to the Identity Manager home page.



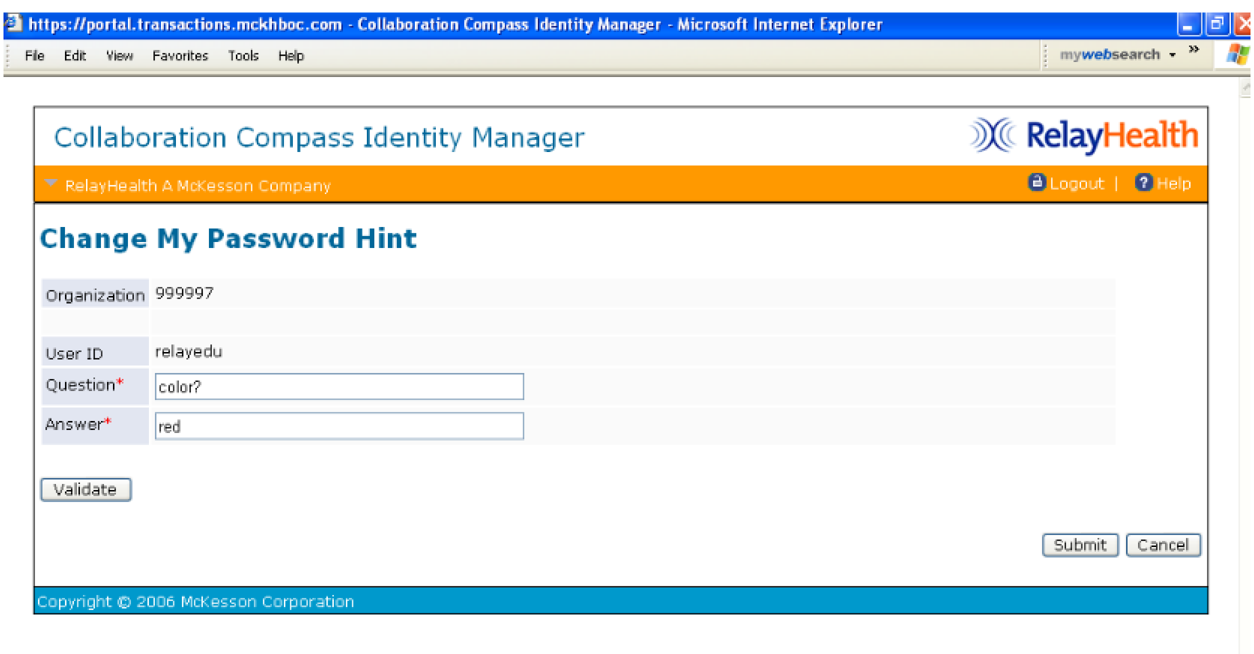
Change My Password Hint

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

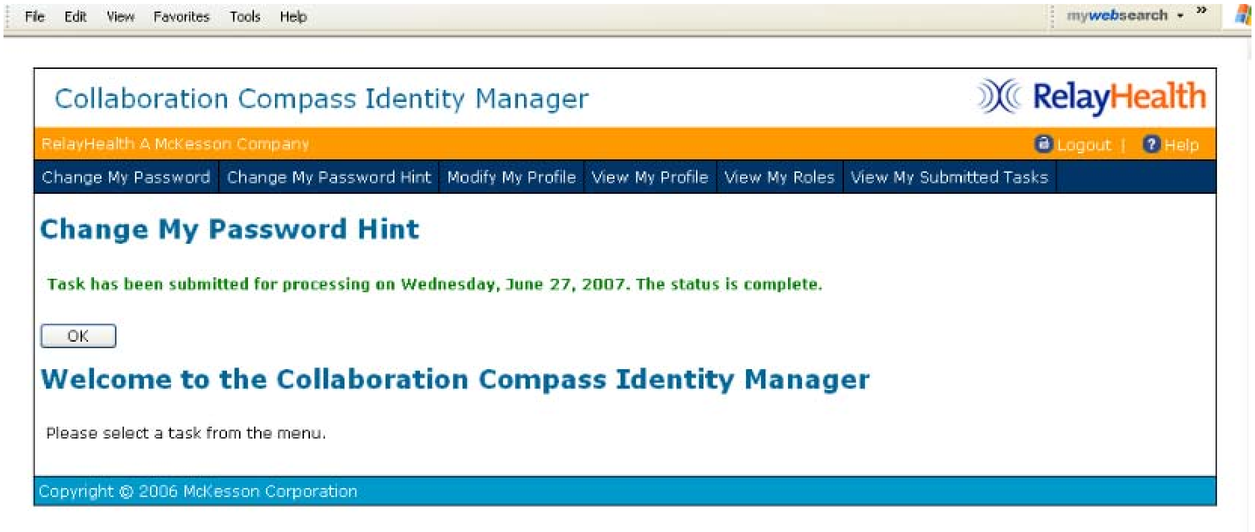
1. Click **Change My Password Hint**.



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



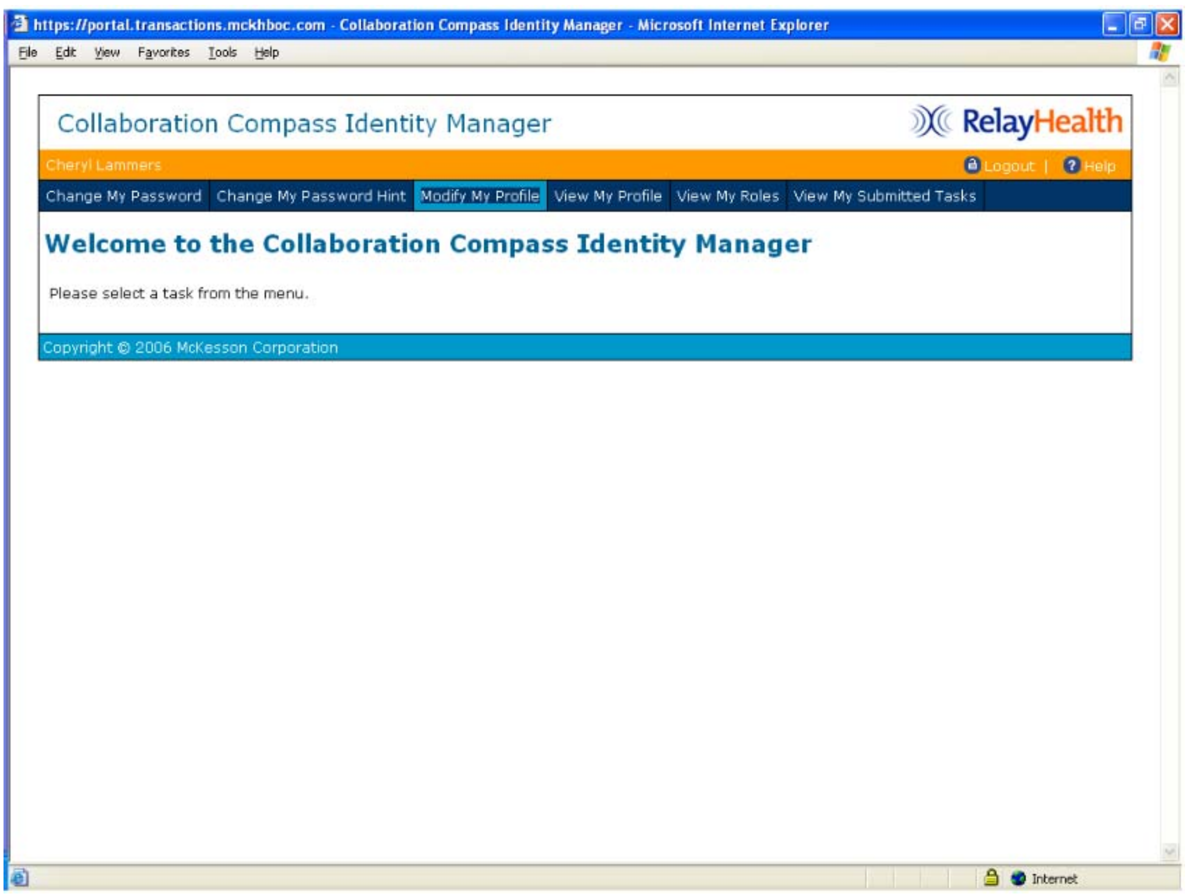
3. Click **OK**.



Modify My Profile

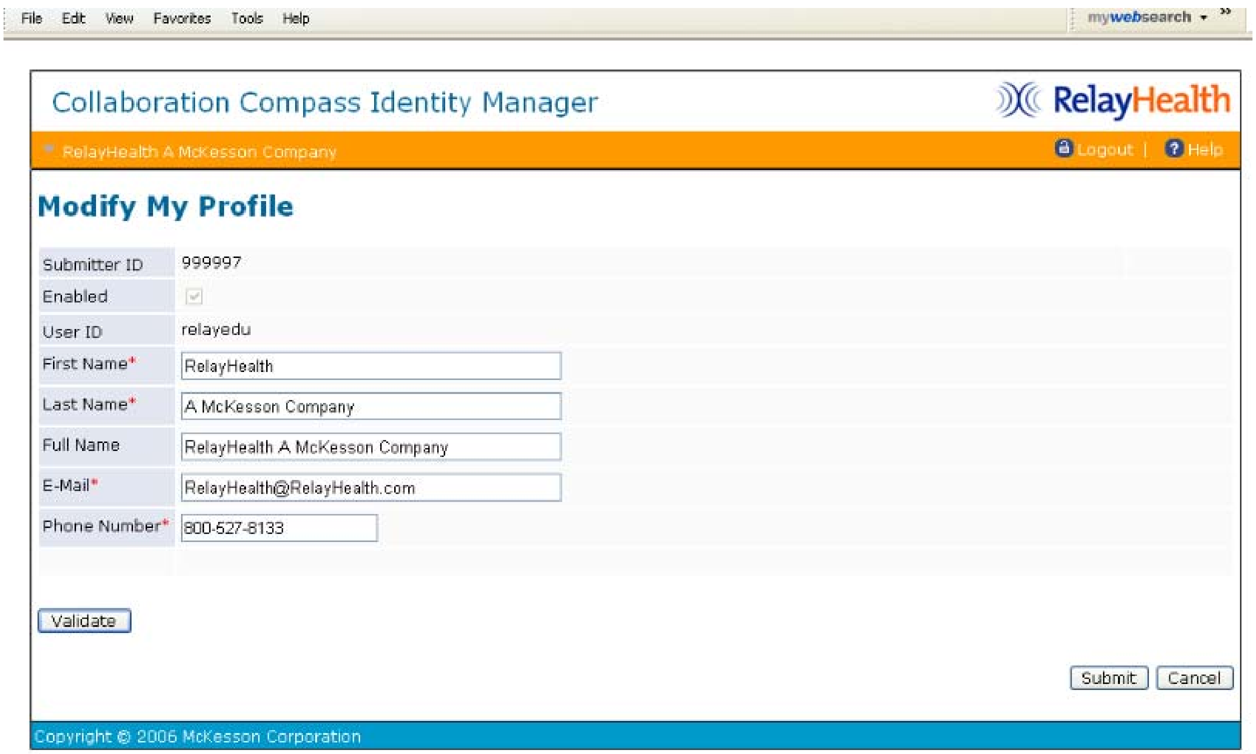
Modify My Profile allows users to change their demographic information, like the email address or phone number associated with their account.

1. Click **Modify My Profile**.

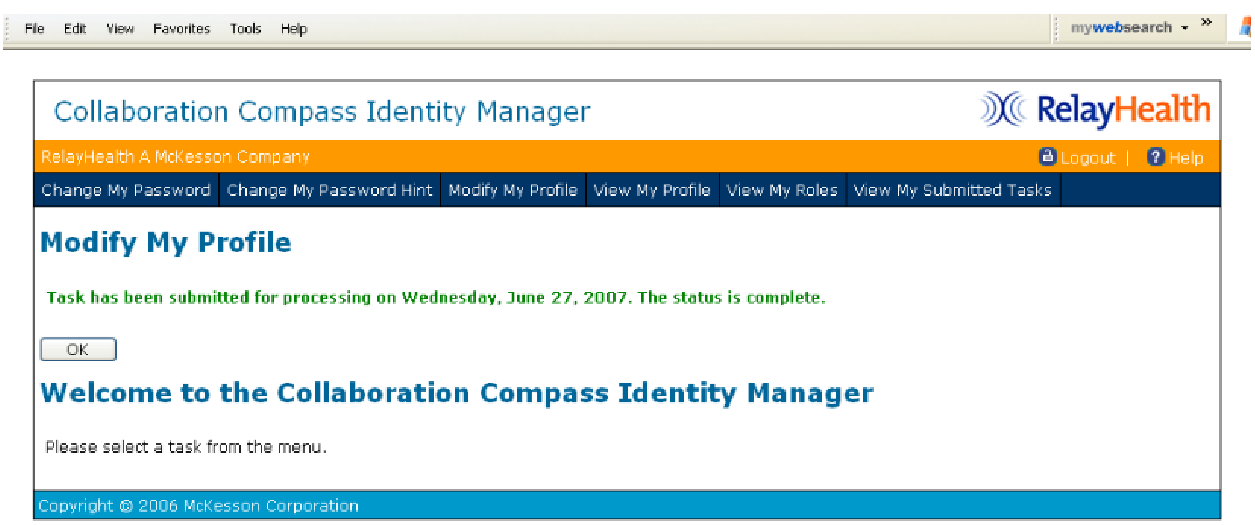


2. Update the necessary information and click **Submit**.

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



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



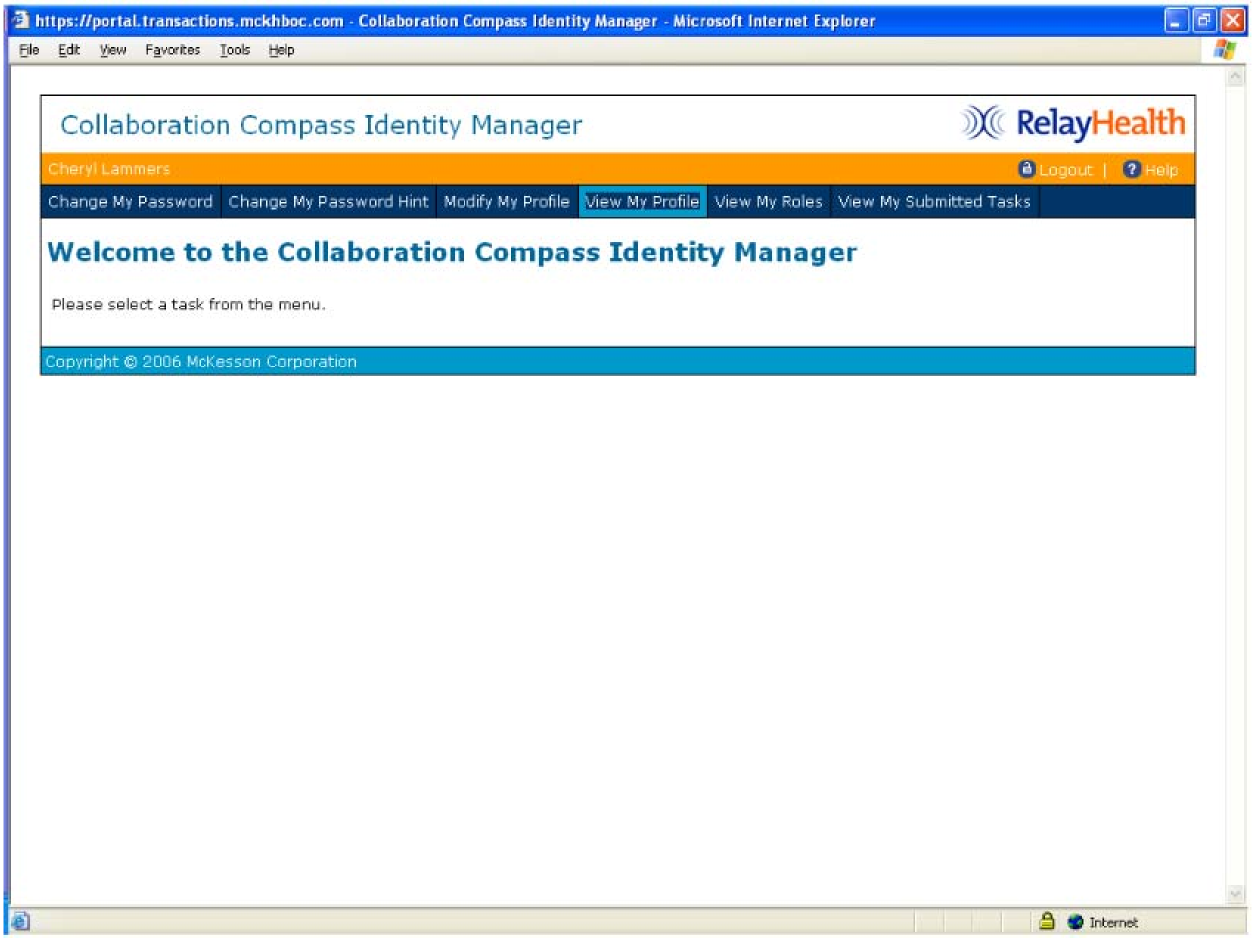
View My Profile

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

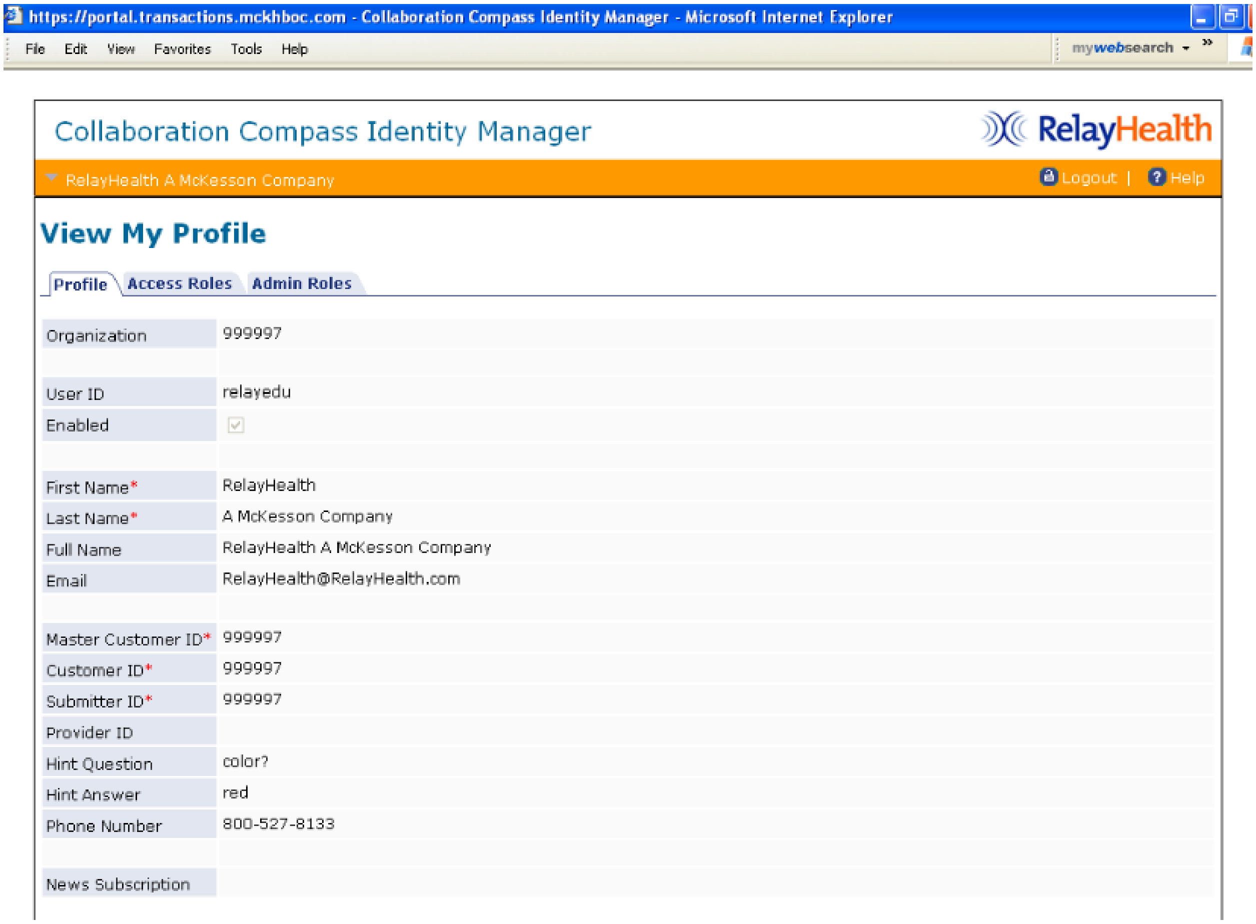
Access Roles grant users access to RelayHealth applications, like the ASP Eligibility application or the Agreements Website.

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**.

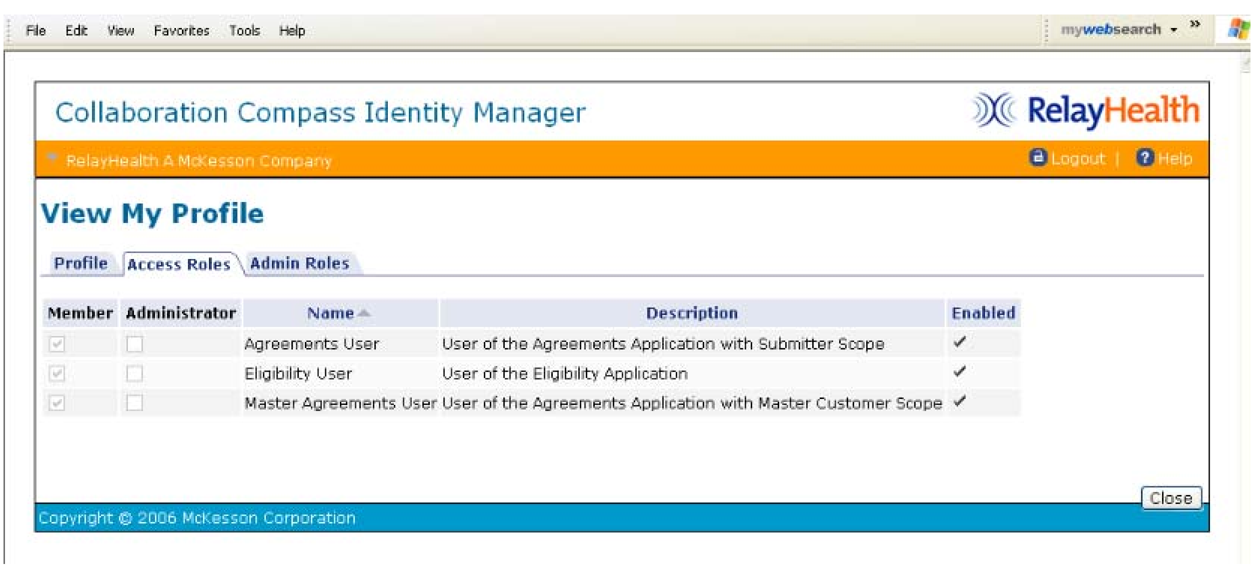


2. The Profile tab allows users to view their demographic information and News Subscriptions, as well as the Submitter ID associated with their user ID.



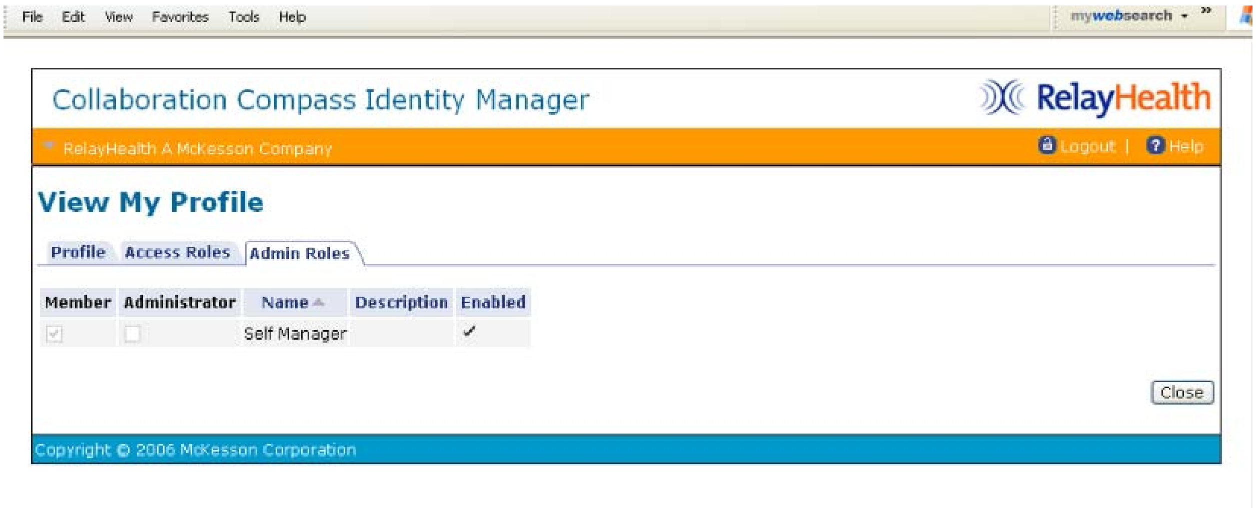
3. To view Access Roles, click the **Access Roles** tab.

- Members of a role are granted the rights associated with a role
- Administrators of a role may assign it to other users



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



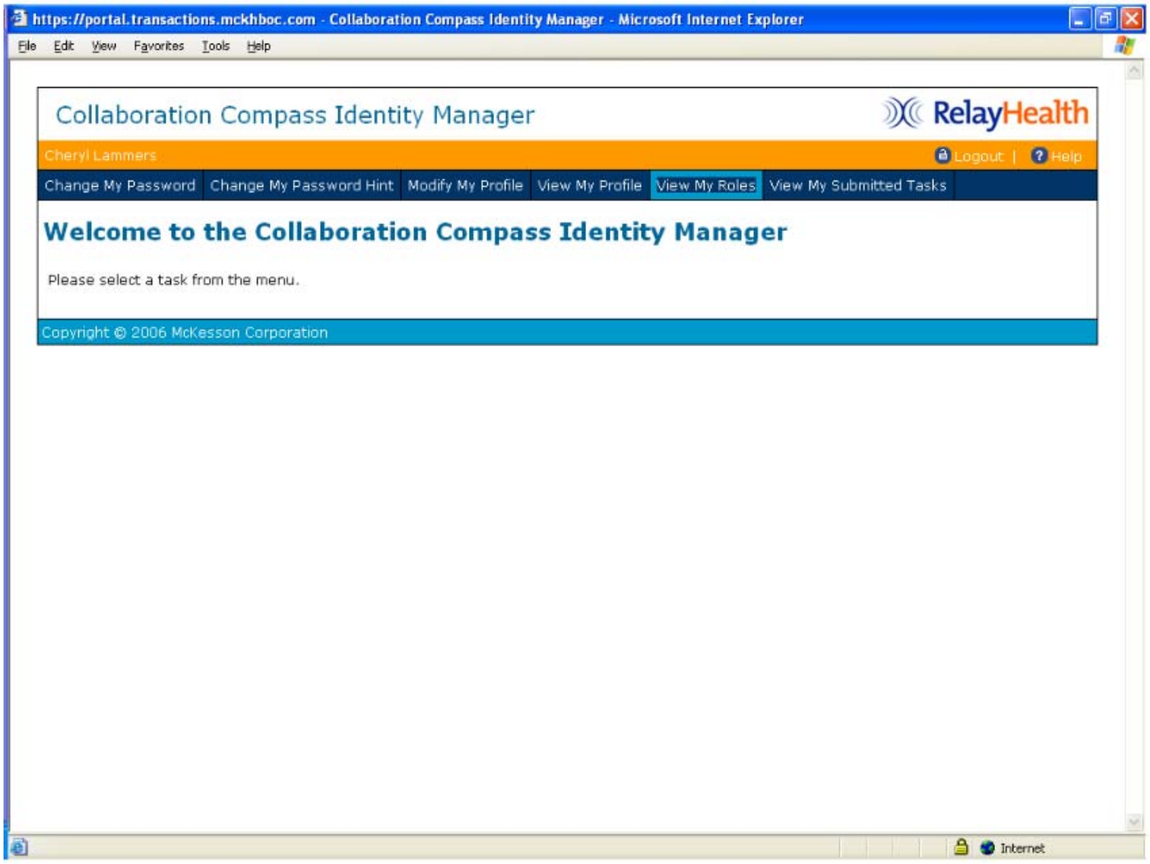
5. Click **Close** to return to the Identity Manager home screen.

View My Roles

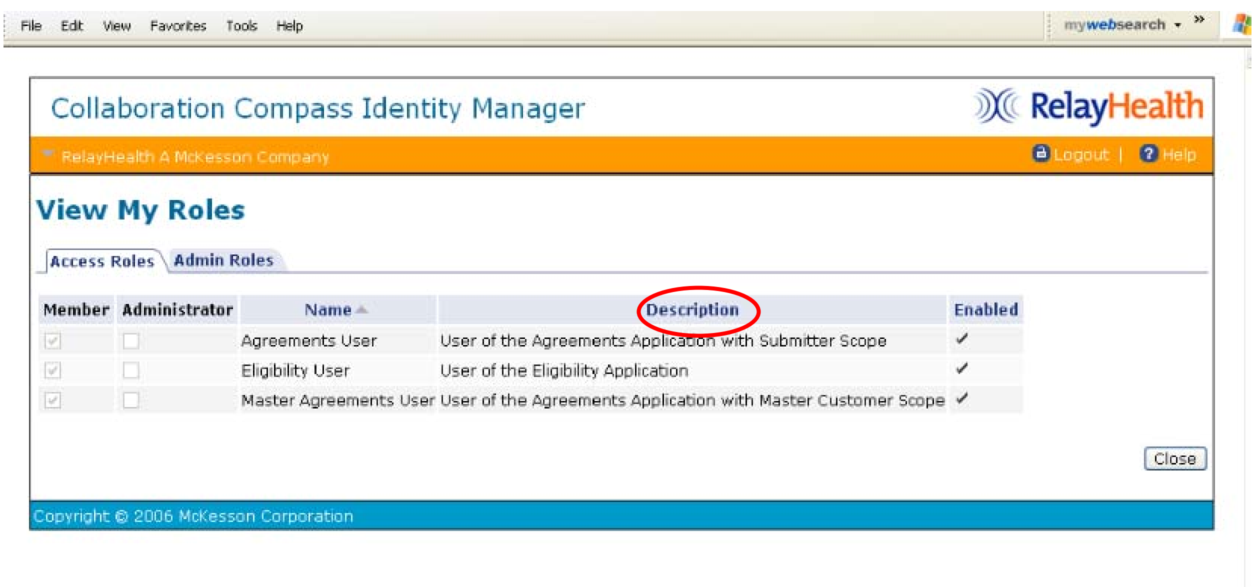
View My Roles displays a list of Access and Admin roles associated with a user account.

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.

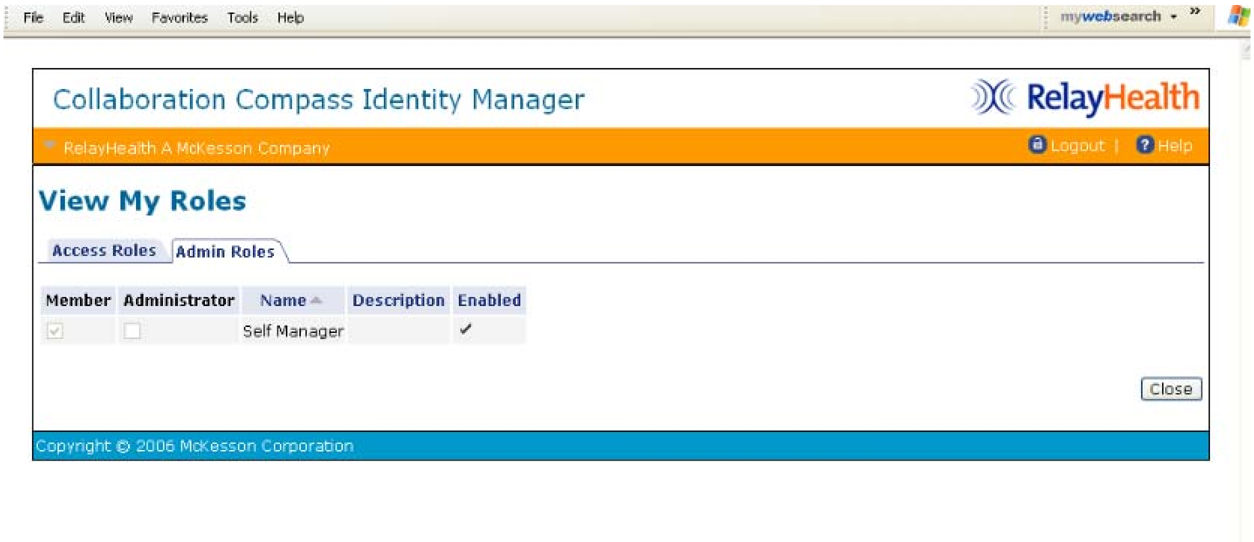
1. Click **View My Roles**.



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



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

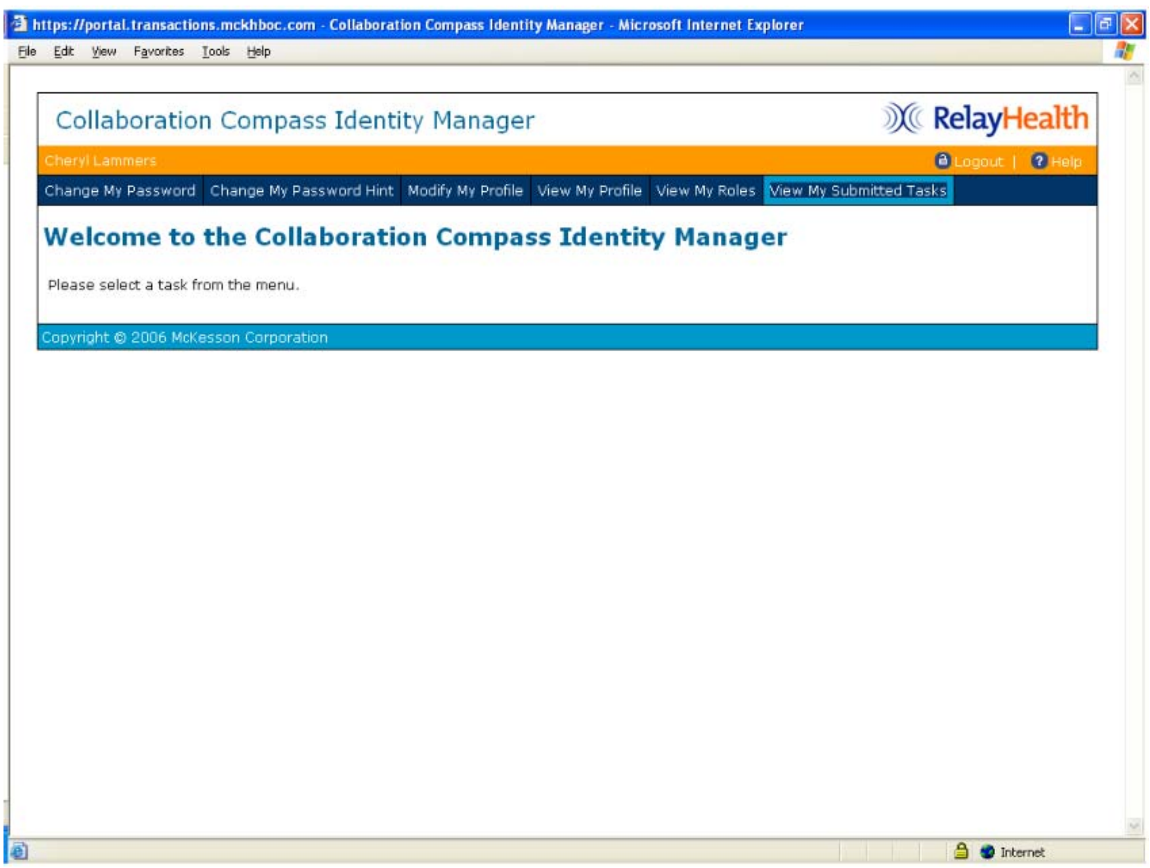


4. Click **Close** to return to the Identity Manager home screen.

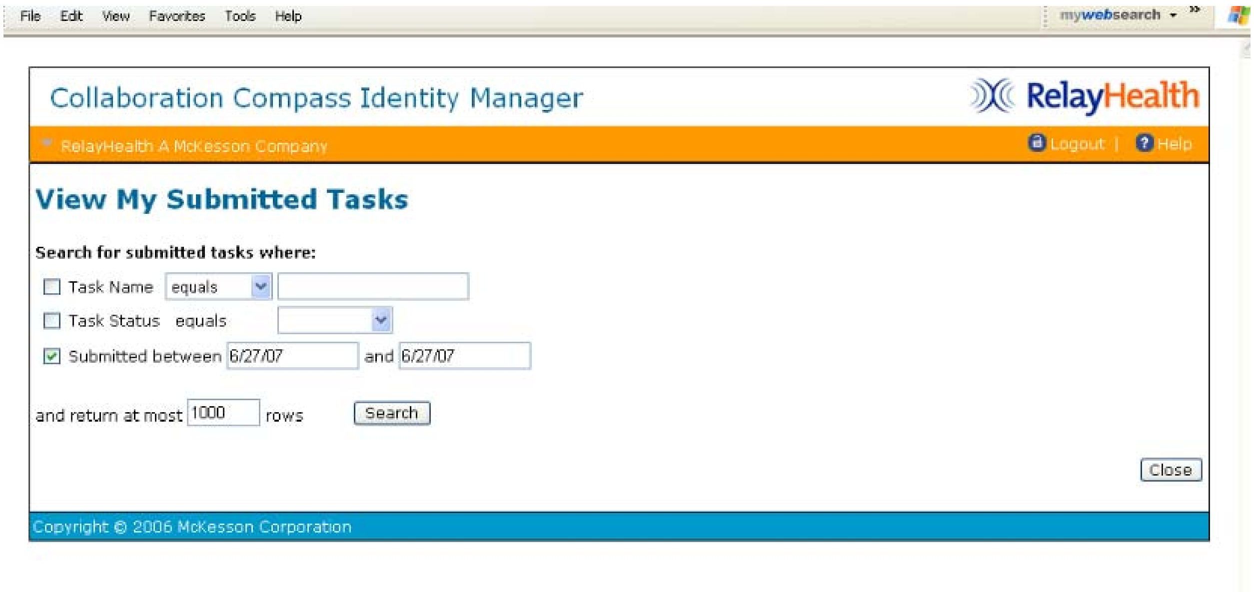
View My Submitted Tasks

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.

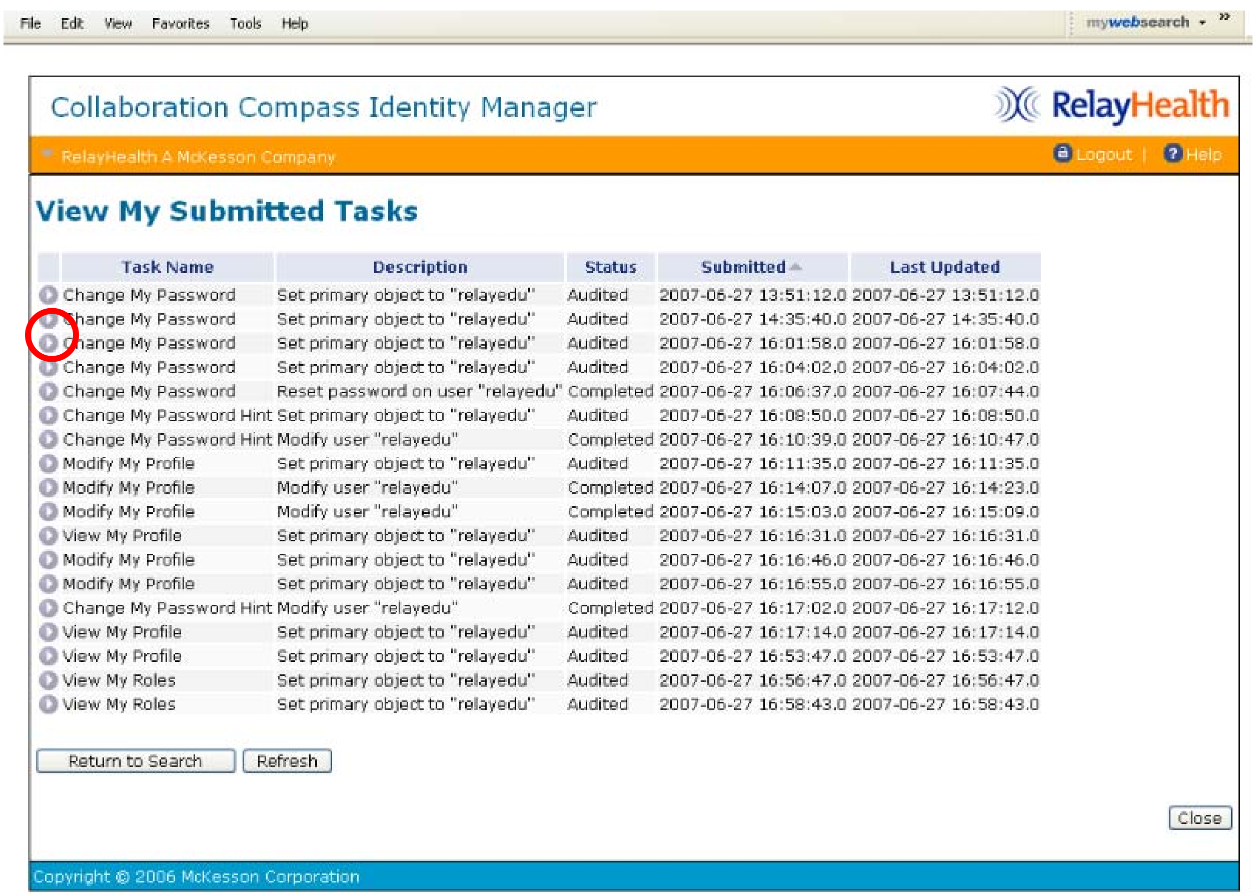
1. Click **View My Submitted Tasks**.



2. Enter search criteria.
3. Click **Search**.

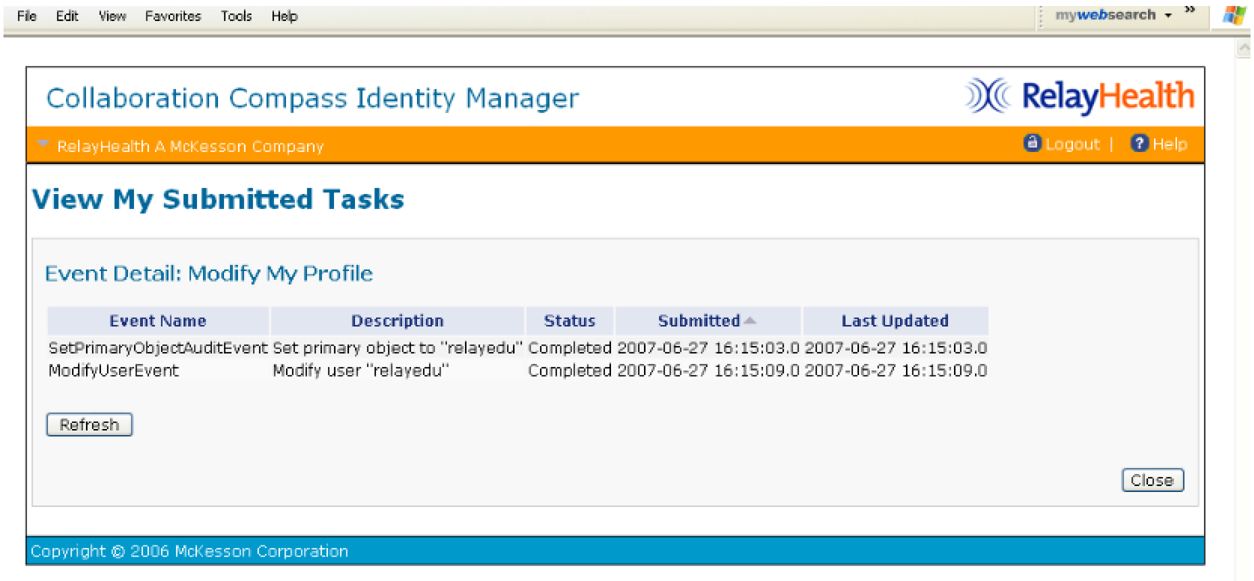


4. Click the **Edit** icon to view the desired task.



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

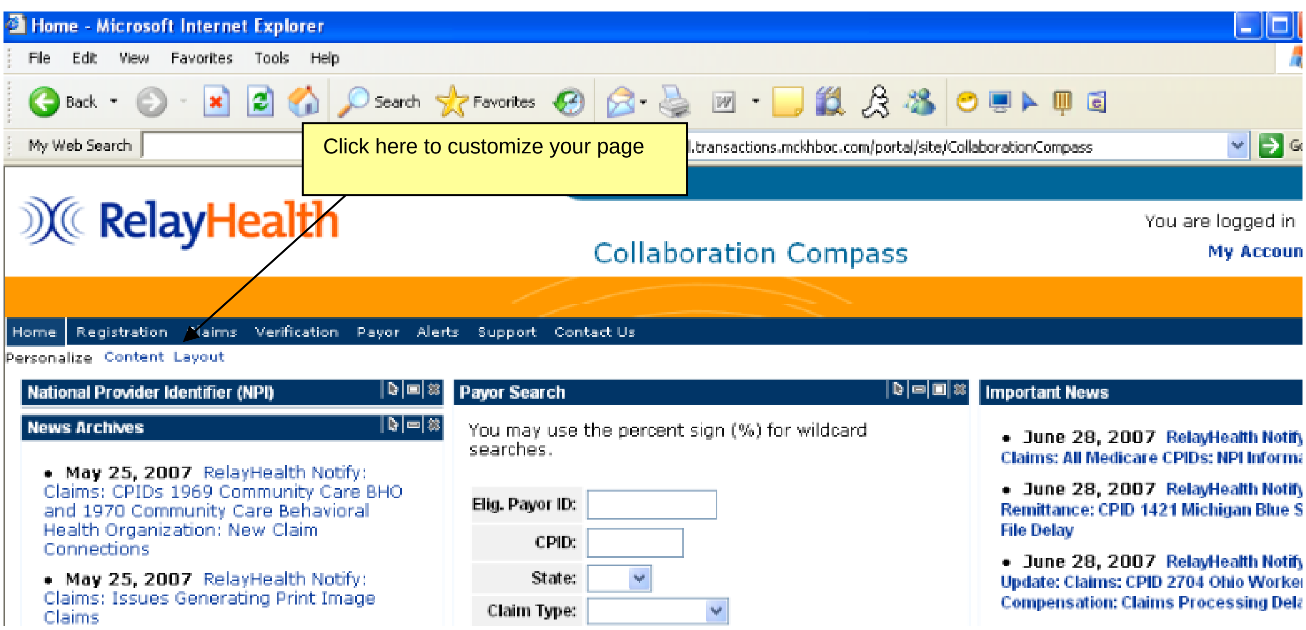
Note: Users will see Completed or Audited in the Status column for each task. Completed tasks are changes submitted to the application and completed. Audited tasks were viewed but no change was submitted. An audit entry is inserted each time an item is viewed.



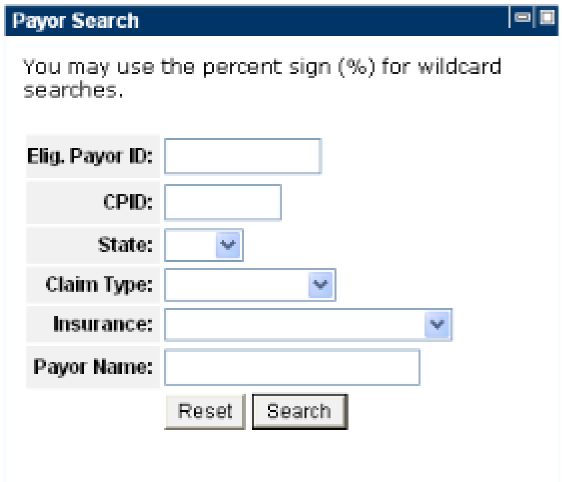
5. Click **Close** to return to the Identity Manager home page.

Customizing Your Pages

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:

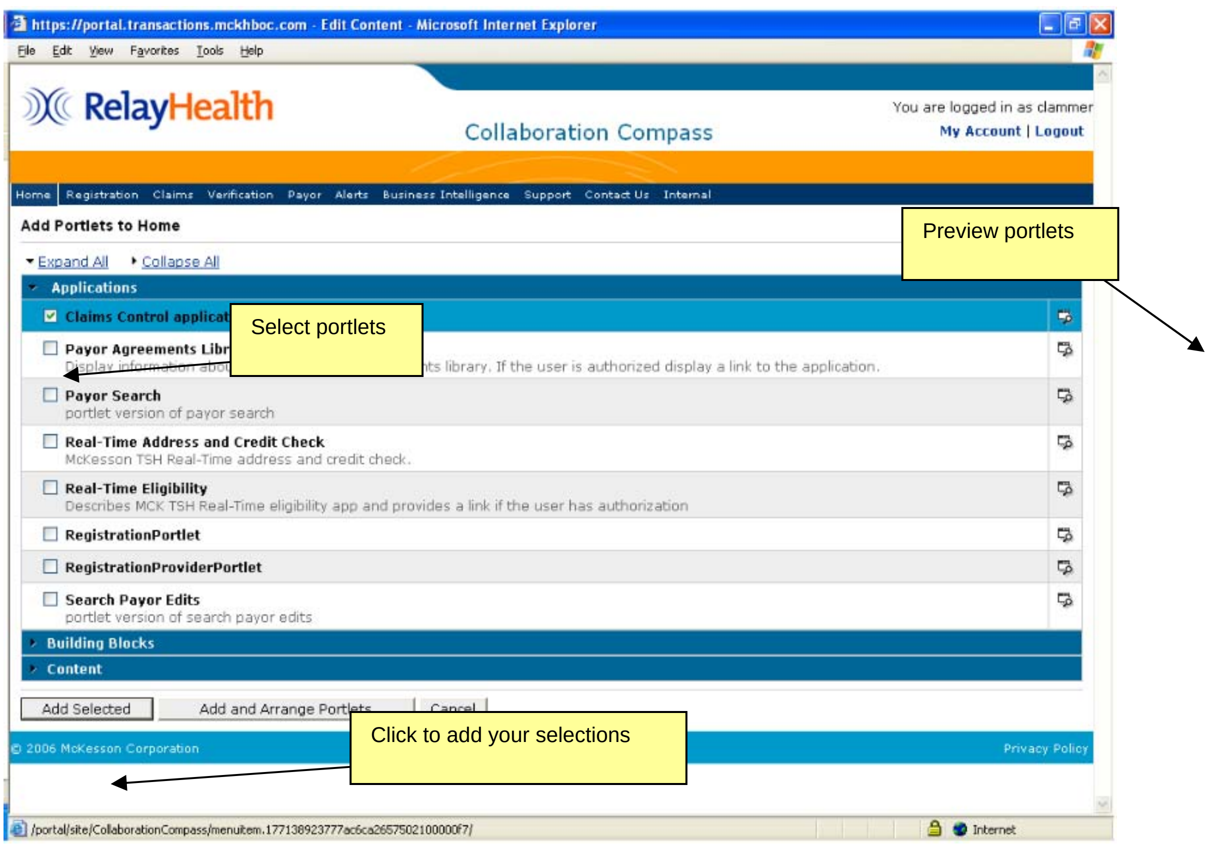


Adding Content

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.
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:

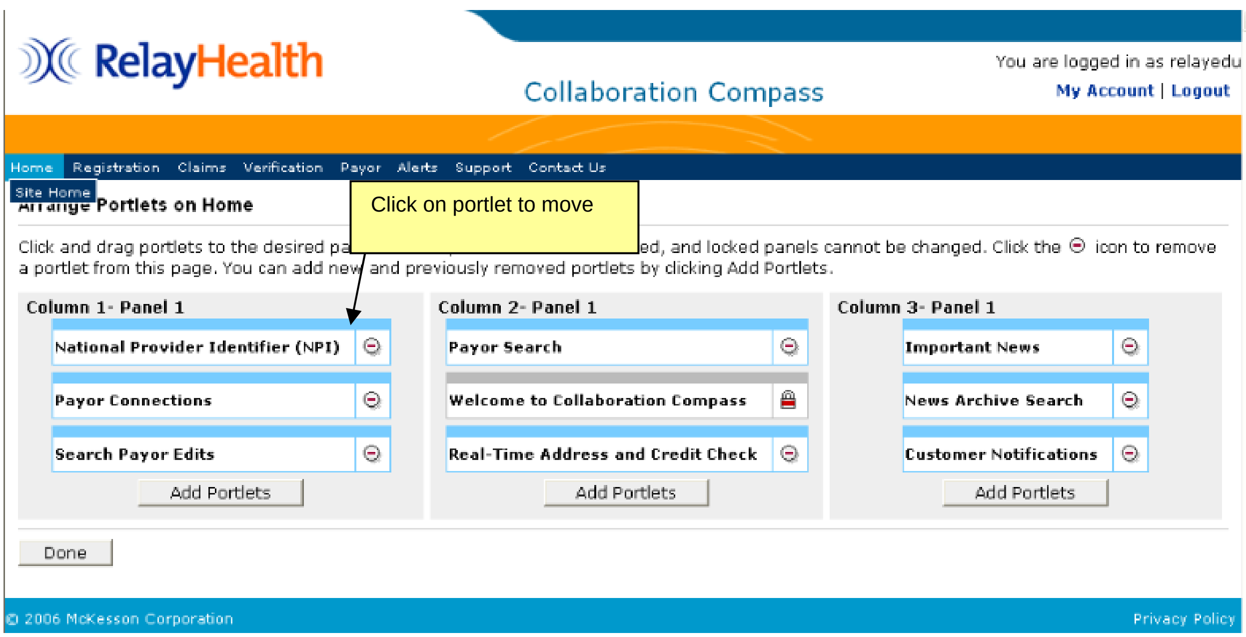
Expand All	Clicking this link expands all sections to display all portlets.
Collapse All	Clicking this link collapses all sections and only the section headings will appear.
Preview Icon	Clicking this icon displays a preview of the content of that portlet.
Portlet List	Each portlet contains a description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

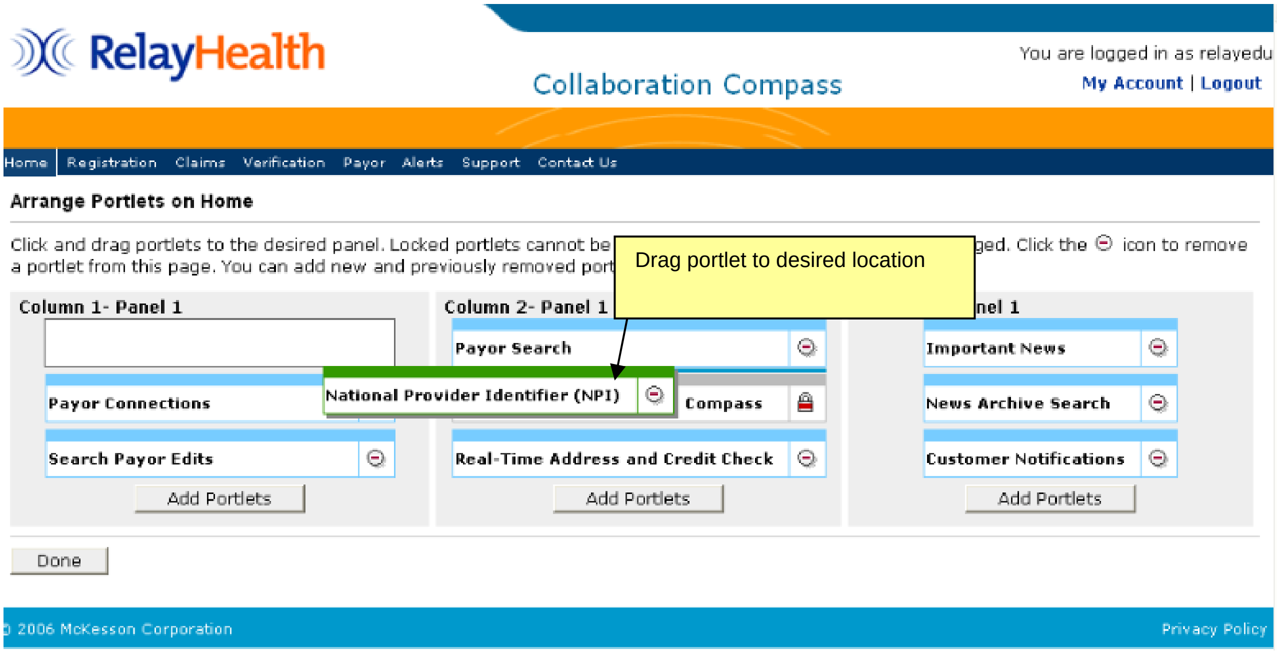
Layout

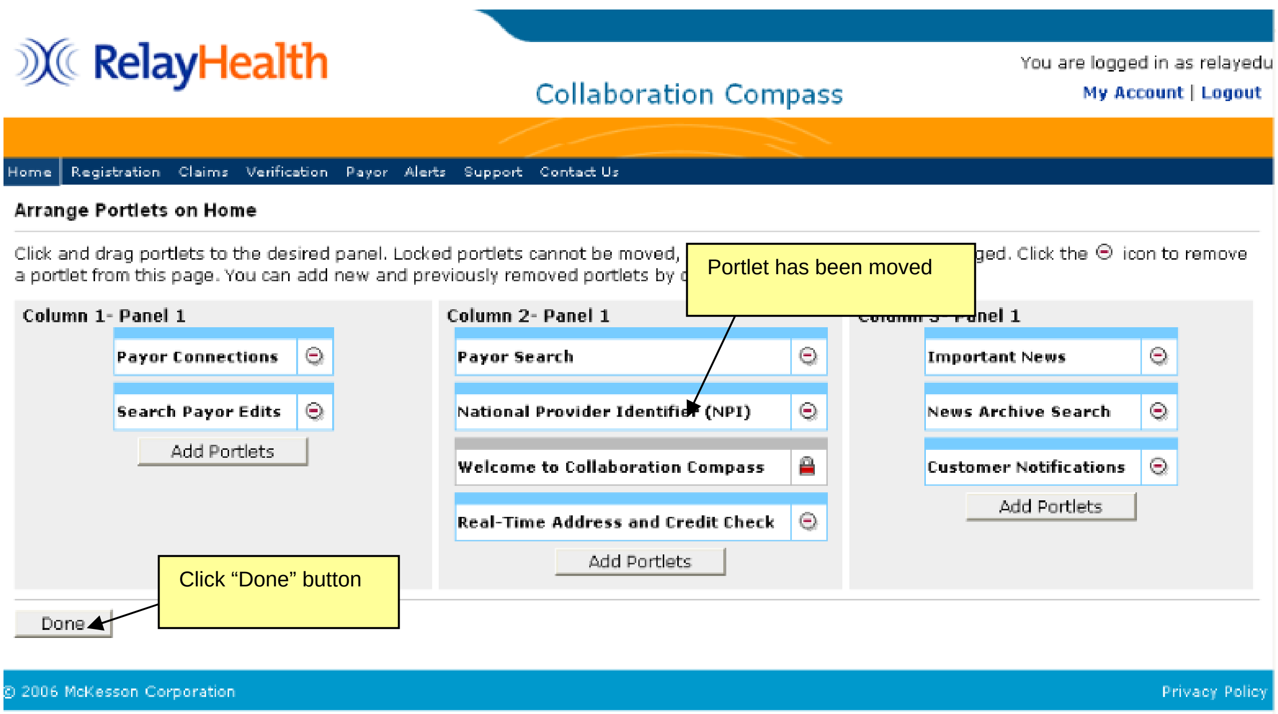
To arrange the layout of portlets on your Home page, complete the following steps:

Main Path

1. Click the **Layout** link at the top left of the page.
2. Click on the portlet you would like to move and drag it to the desired location.
3. Click the **Done** button.

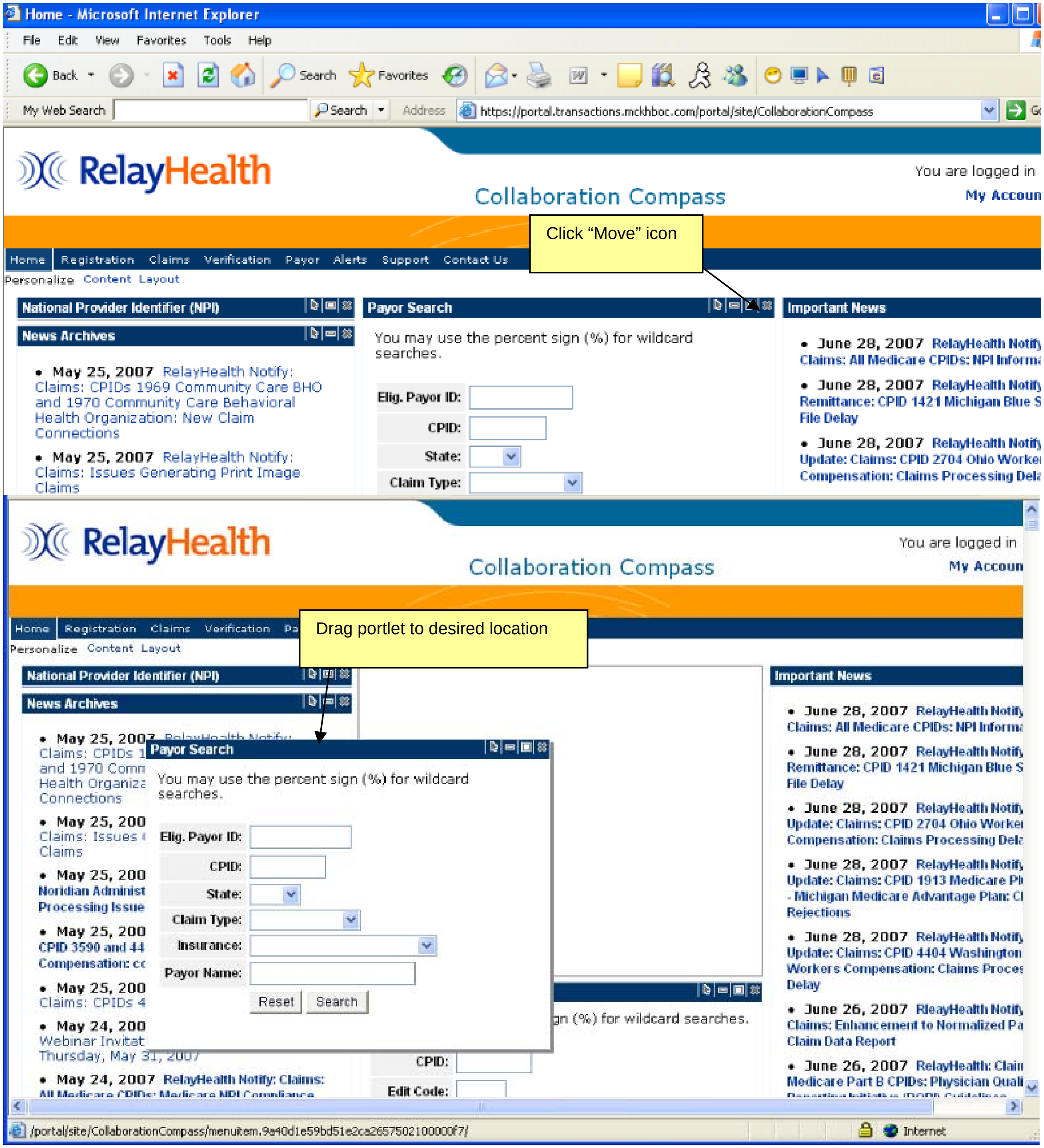


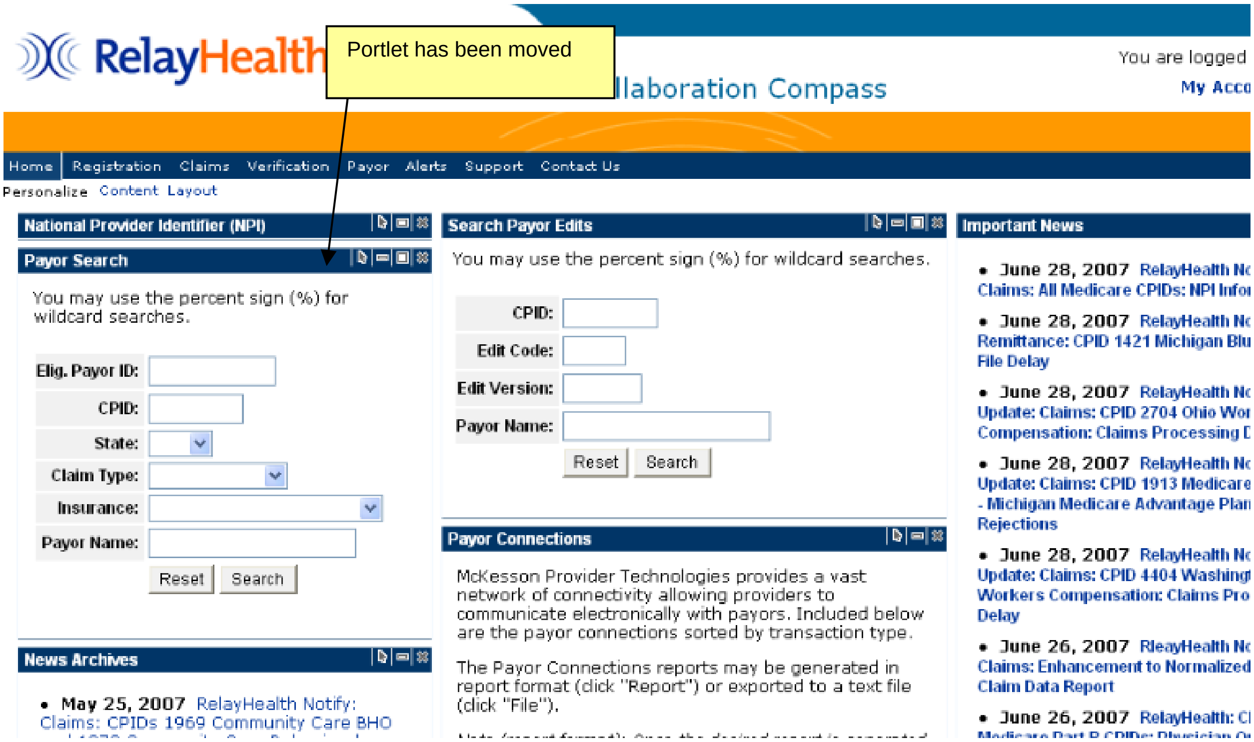




Alternate Path

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


Home - Microsoft Internet Explorer
https://portal.transactions.mckhboc.com/portal/site/CollaborationCompass
RelayHealth
Collaboration Compass
Click “Move” icon
Home Registration Claims Verification Payor Alerts Support Contact Us
Personalize Content Layout
National Provider Identifier (NPI)
News Archives
Payor Search
You may use the percent sign (%) for wildcard searches.
Elig. Payor ID:
CPID:
State:
Claim Type:
Important News
Drag portlet to desired location
Insurance:
Payor Name:
Reset
Search

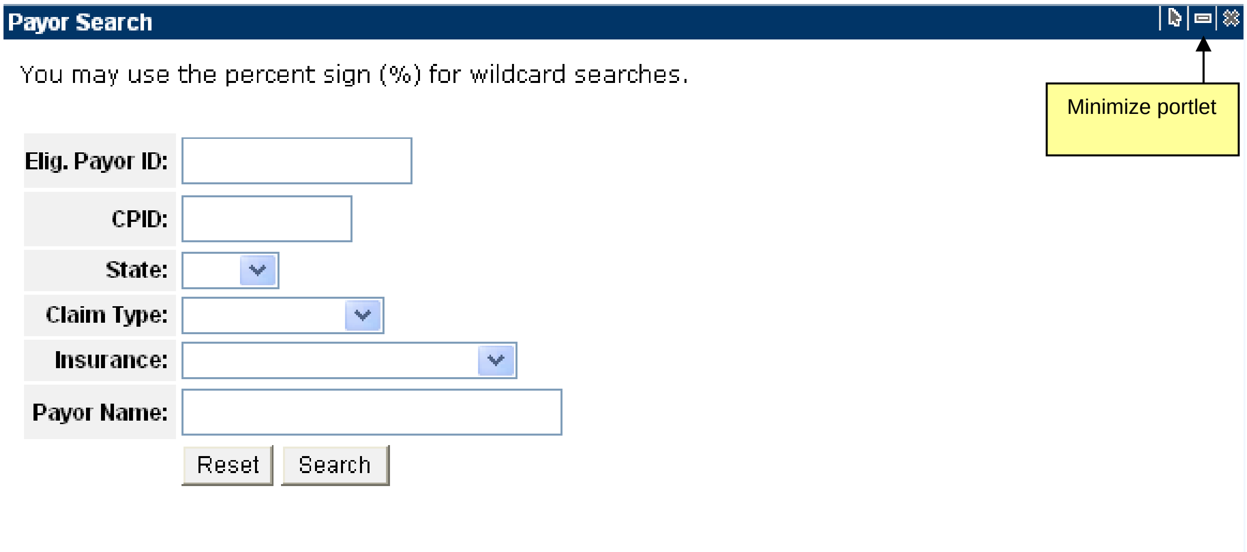


The following describes each of the elements found on the Layout page:

Instructional Text	Gives instruction on arranging portlets on a page.
Portlet	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.
Remove Icon	Clicking this icon removes the portlet from the page.
Portlet List	Each portlet contains a description of the portlet and a check box for selection.
Add Portlets	Clicking this button displays the Add Content page.
Done	Clicking this button displays either your Home page or the Applications page with your layout changes.

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.

Removing Portlets

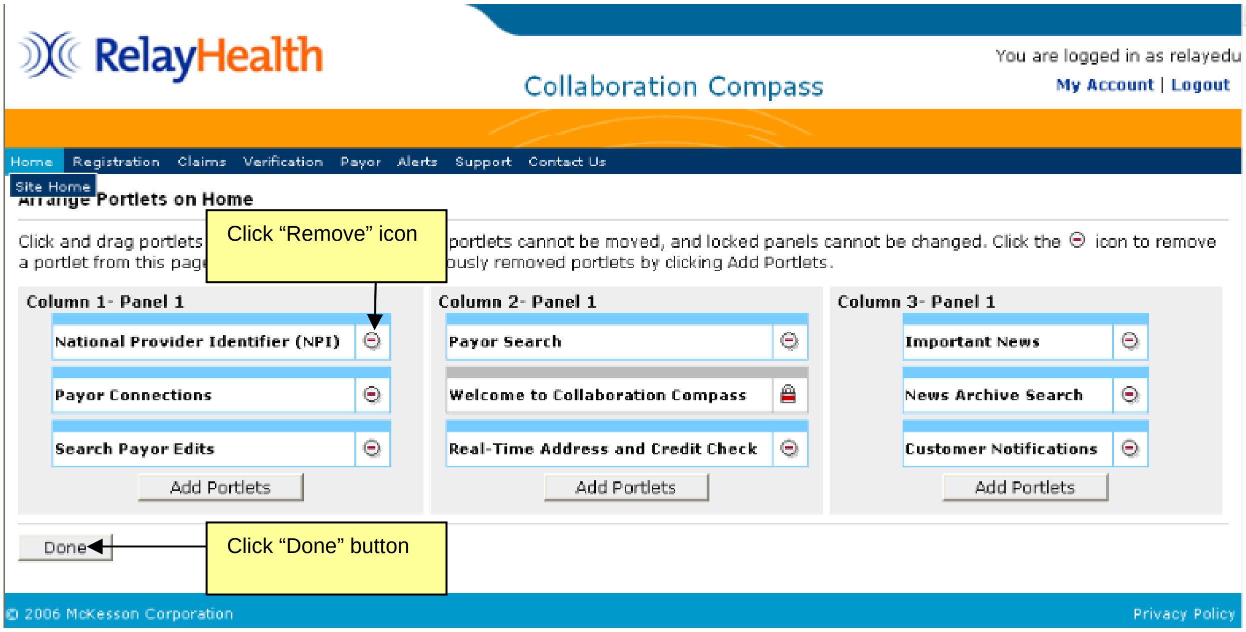
To remove portlets on your Home page or the Applications page, complete the following steps:

Main Path

- 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.
2. Click the **Remove** icon on the Layout page.
3. Click the **Done** button.



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 and arrange them in the layout of your choice.

Site Home

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

Registration

From the Registrations item on the navigation menu, the following information is displayed:

- Enrollment Services
- Enrollment Tools - Contains helpful documents regarding the Payor Agreement Library and the Online Viewer for Payor Agreements.

User(s)

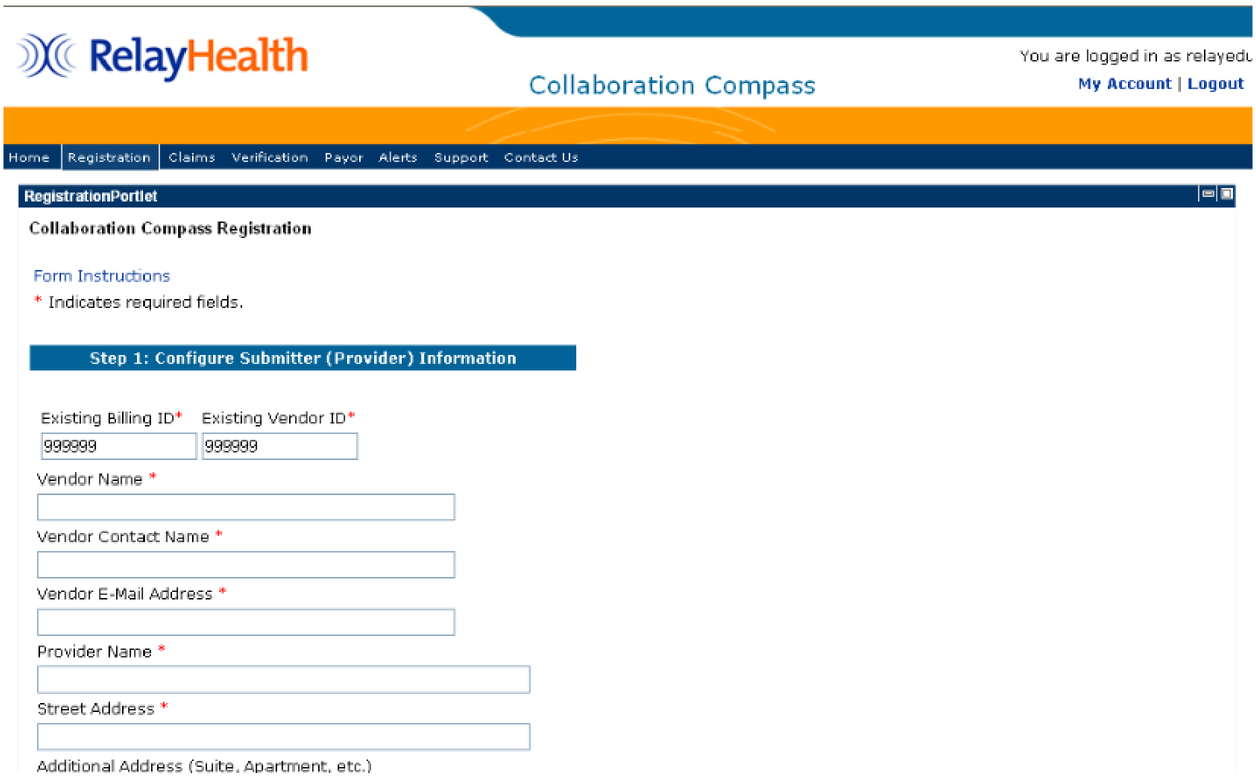
From the Registration item on the navigation bar, hover over Registration and click **User(s)** to begin registration of additional users. This will display the User Registration form covered previously.

Submitter(s)

From the Registration item on the navigation bar, hover over Registration and click **Submitter(s)** to begin registration of submitters. This will display the Submitter Registration form seen below.

The following describes each of the elements found on the Submitter(s) Registration page:

Instructional Text	Gives instruction on submitter registration.
Function List	Contains a list of functions that you can request access to. Select all that apply.
Reset	Clicking this button clears any selections made.
Submit	Clicking this button displays the Registration Form(s) for the functions selected.

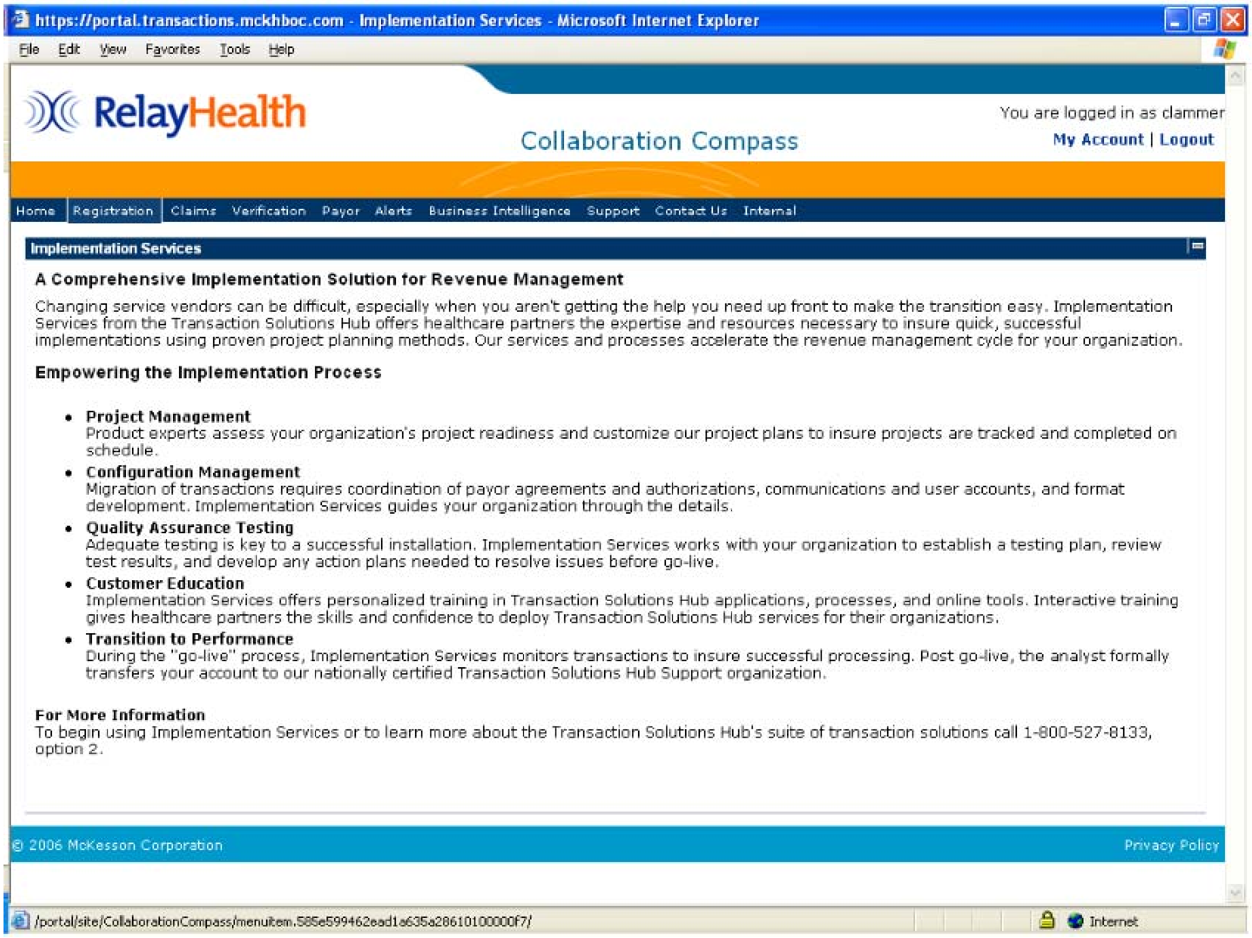


The following describes each of the elements found on the Submitter(s) Registration Form:

Form Instructions link	Displays the Registration Form Instructions in a new window.
Various Registration Fields	The fields that appear depend on the functions selected on the Submitter(s) Registration page.
Reset	Clicking this button clears all fields.
Submit	Clicking this button submits your registration.

Implementations

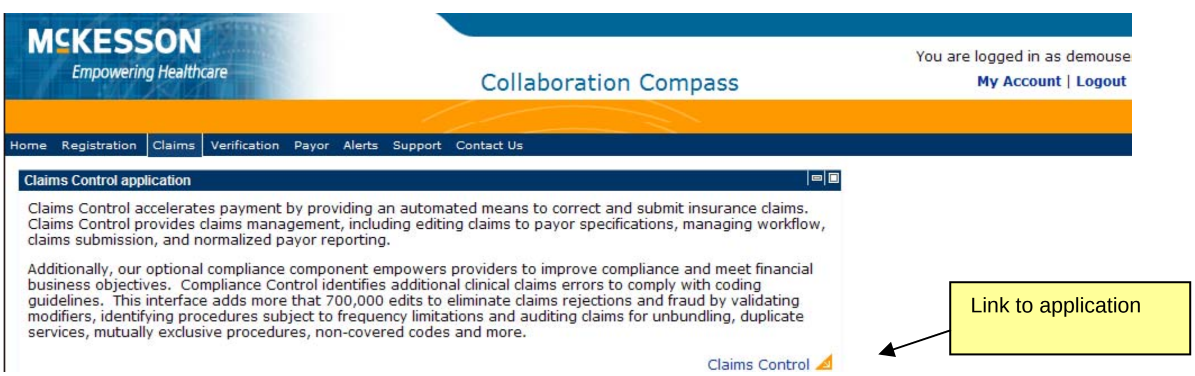
Implementation Services can be found under the Registration navigation item. Implementation Services describes the services and processes used to accelerate the revenue management cycle for your organization.



Claims

Claims Control

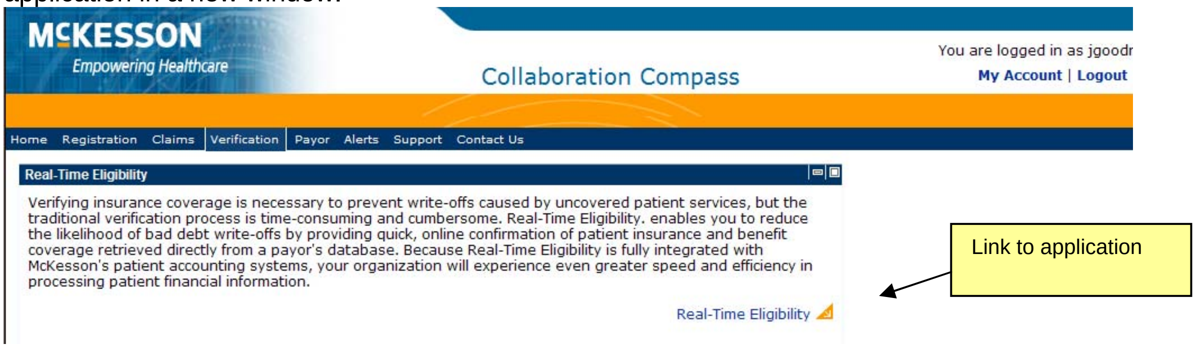
The Claims Control page displays a portlet with a description of the Claims Control application and if the user has the appropriate permissions, a link to the application is displayed. Clicking the link will open the application in a new window.



Verification

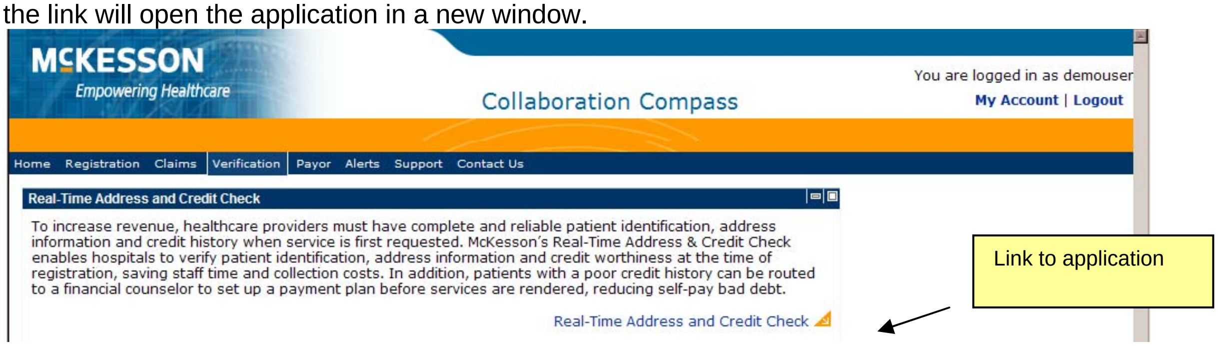
Eligibility

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.



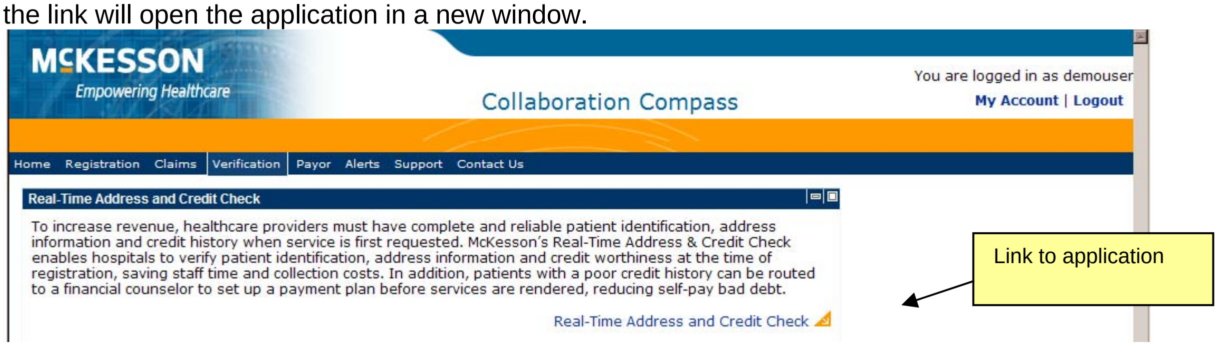
Address Check

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.



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.



Payor

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.

For more information on accessing, selecting, and completing various payor agreements, see the chapter, Using the Payor Agreement Library.

Alerts

What's New

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

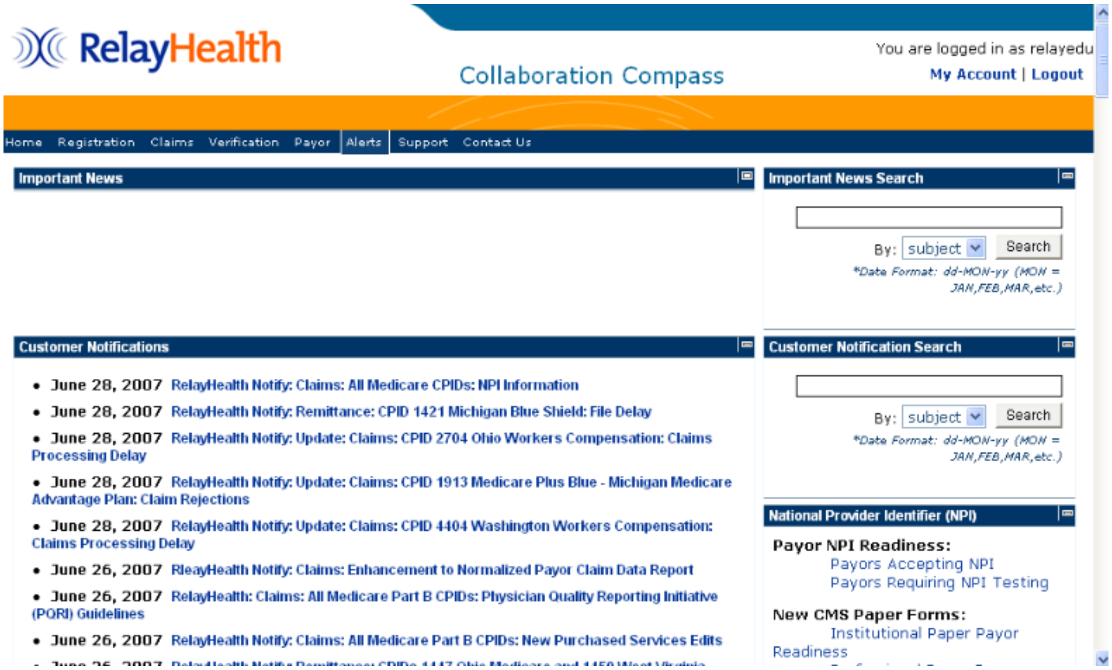
The What's New page contains the following information:

- Important News
- Important News Search

  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.

- Customer Notifications
- Customer Notification Search

  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.



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:

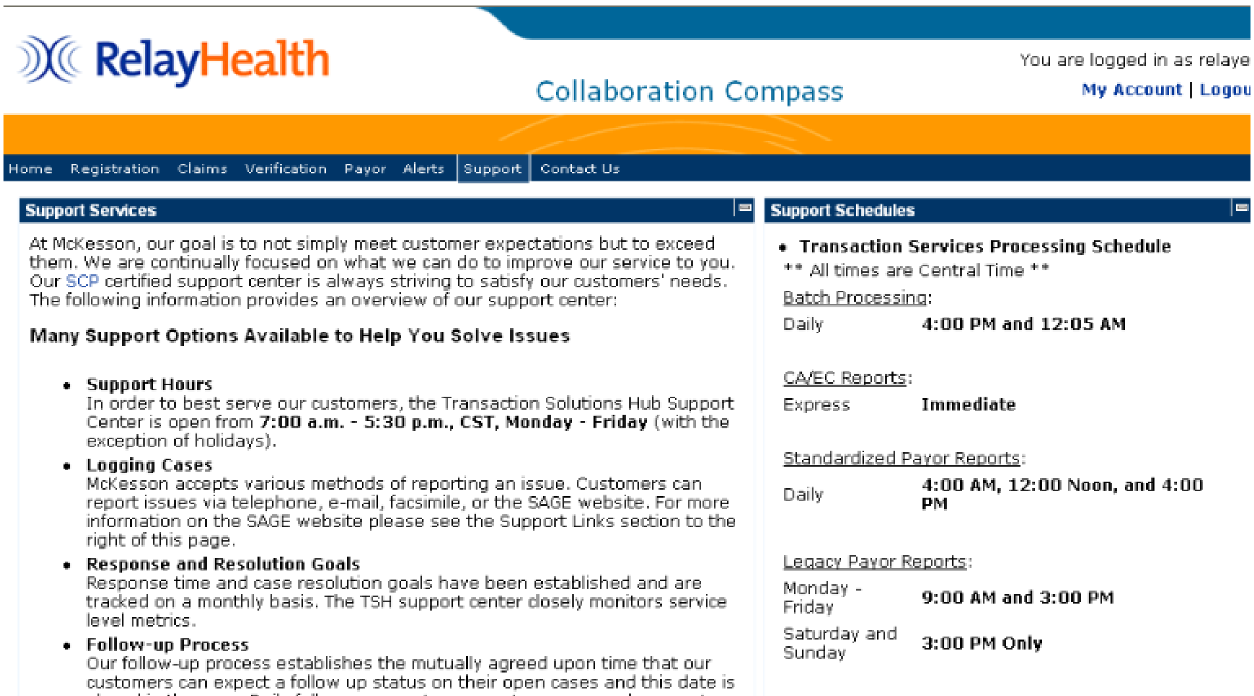
- News Archives
- News Archive Search

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.

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



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

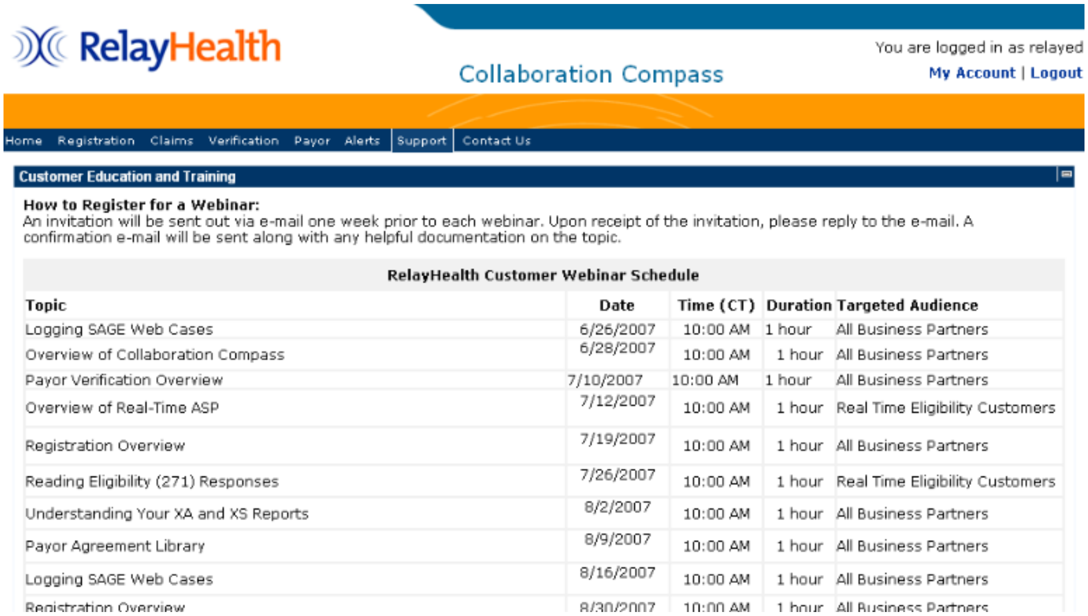
  The Payor Edits utility allows users to view ANSI payor-specific edits for any payors that currently have connections with RelayHealth and receive an ANSI claim file.

  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.

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.



RelayHealth

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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

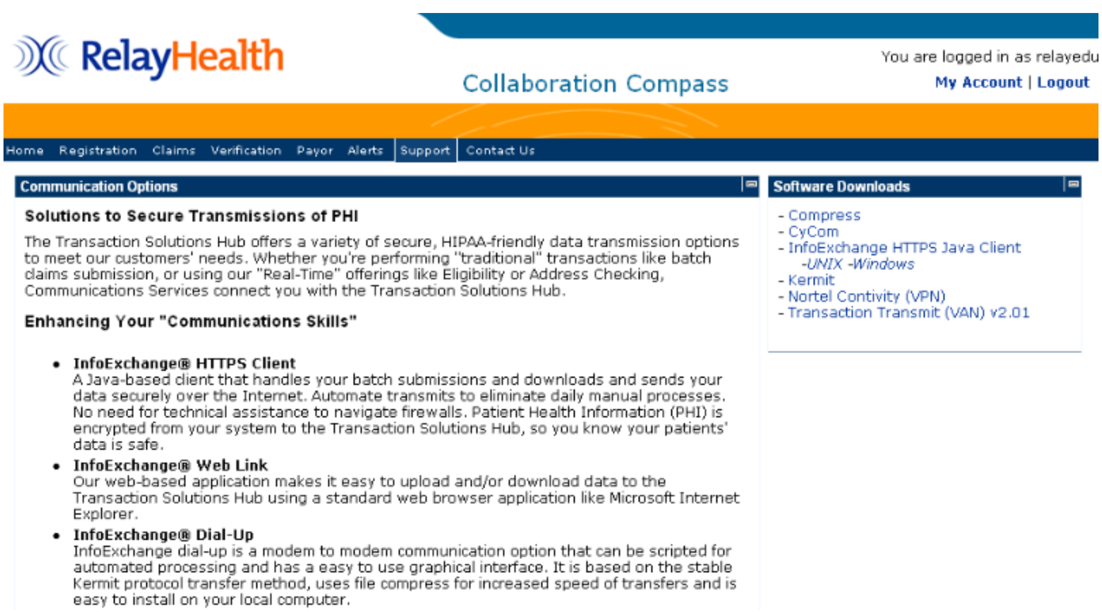
Communication Options

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



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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

Documentation

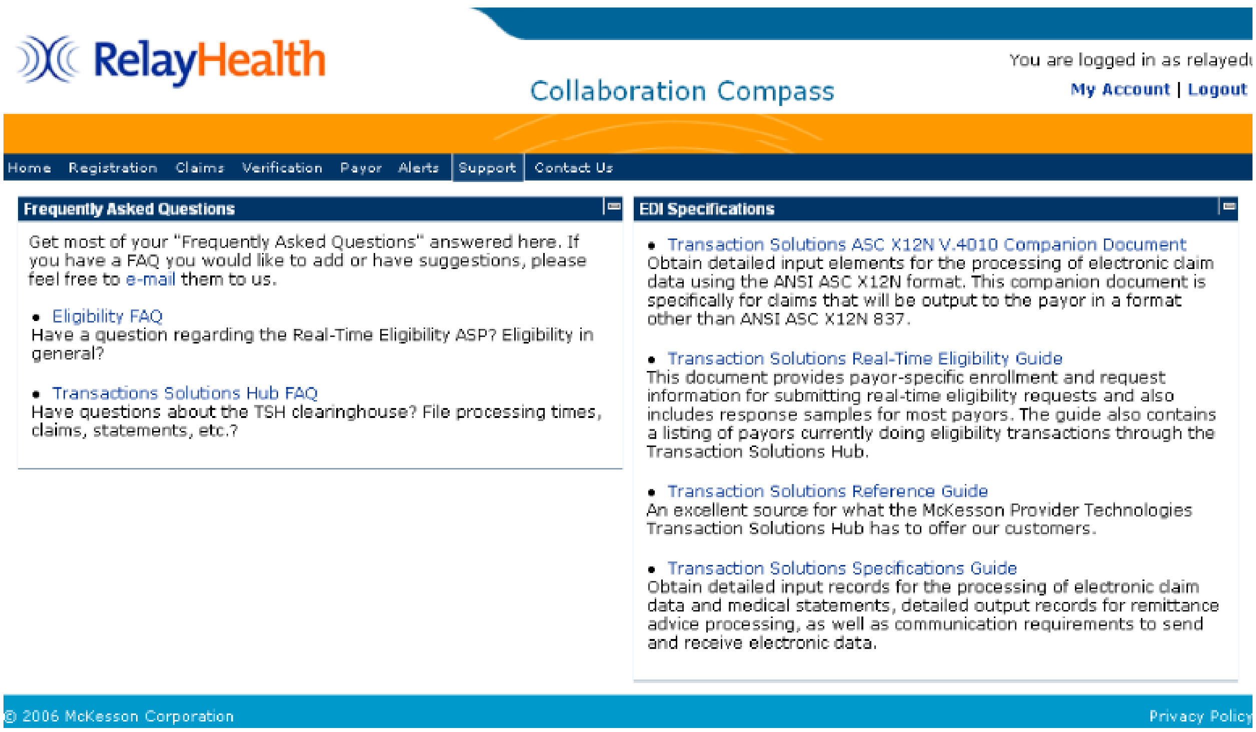
From the Support item on the navigation bar, click the Documentation item to display the Documentation page. The Documentation page contains the following information:

- 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.



Contact Us

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