PaySpan Health
Payer Guide

The **PaySpan Health Payer Guide** is intended to assist Healthcare Payers on accessing the PaySpan Health system. This document provides step-by-step instructions and images of the screens seen by Payers while using PaySpan Health.

Revision Date: January 21, 2008

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Getting Started

Accessing and Using PaySpan Health

Access the PaySpan Health Welcome Page at www.payspanhealth.com.

The following screen will appear:
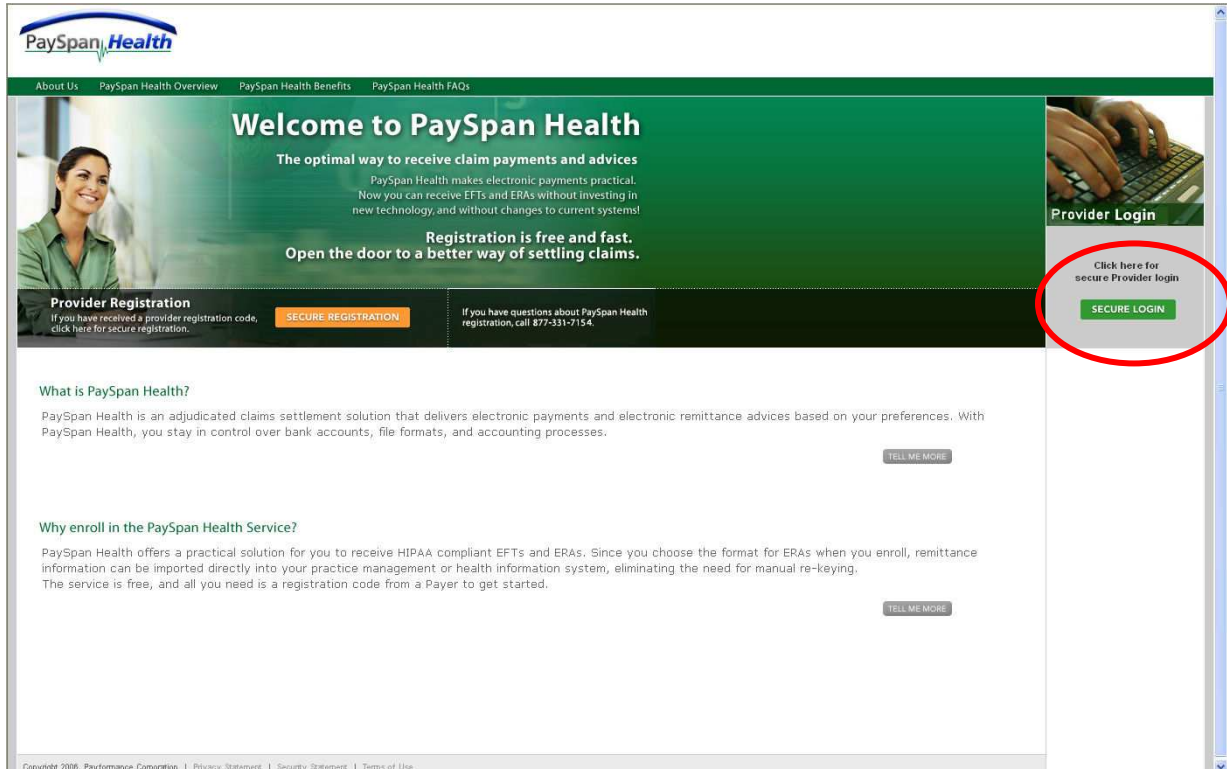
To log in to PaySpan Health, select the **Secure Login** button under *Provider Login*.

Welcome!

After the user has selected the Secure Login button, the screen below will appear.

Enter the user name and password. Passwords need to be at least 8 characters long, contain at least one capital letter, and at least one number.
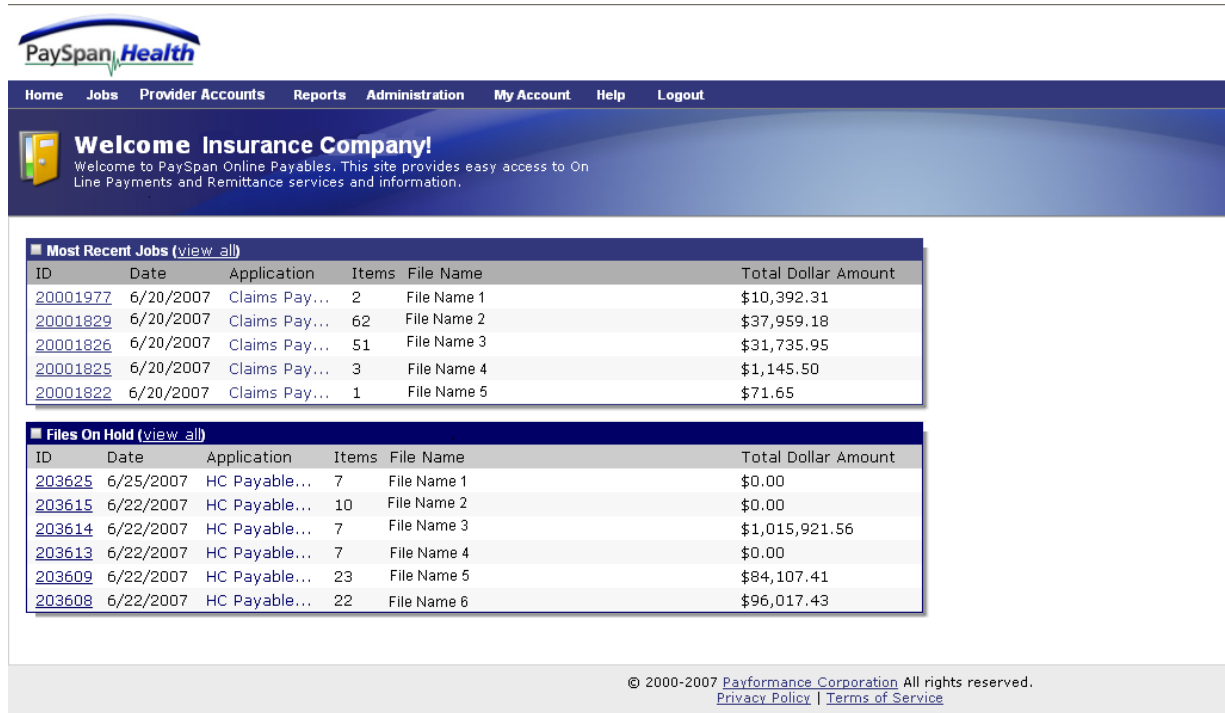
Select the OK button to continue.

Home Page

Once a user has successfully logged into the PaySpan Health System, the following **Home Page** will appear as shown below.

Once files are received by the PaySpan Health system, they are then converted into **Jobs**.

This **Home Page** shows the **Most Recent Jobs** and any files on **Hold**.

In order to see more information regarding a file on hold, select the file ID number in the Files on Hold window.

File Summary

Once the user has selected a File from the Home Page, the **File Summary** page appears.

The **Details** button will show the items contained in the file selected. The **Delete** button allows the user to delete a File completely from the PaySpan Health System. The **Return** button will take the user back to the Home Page.

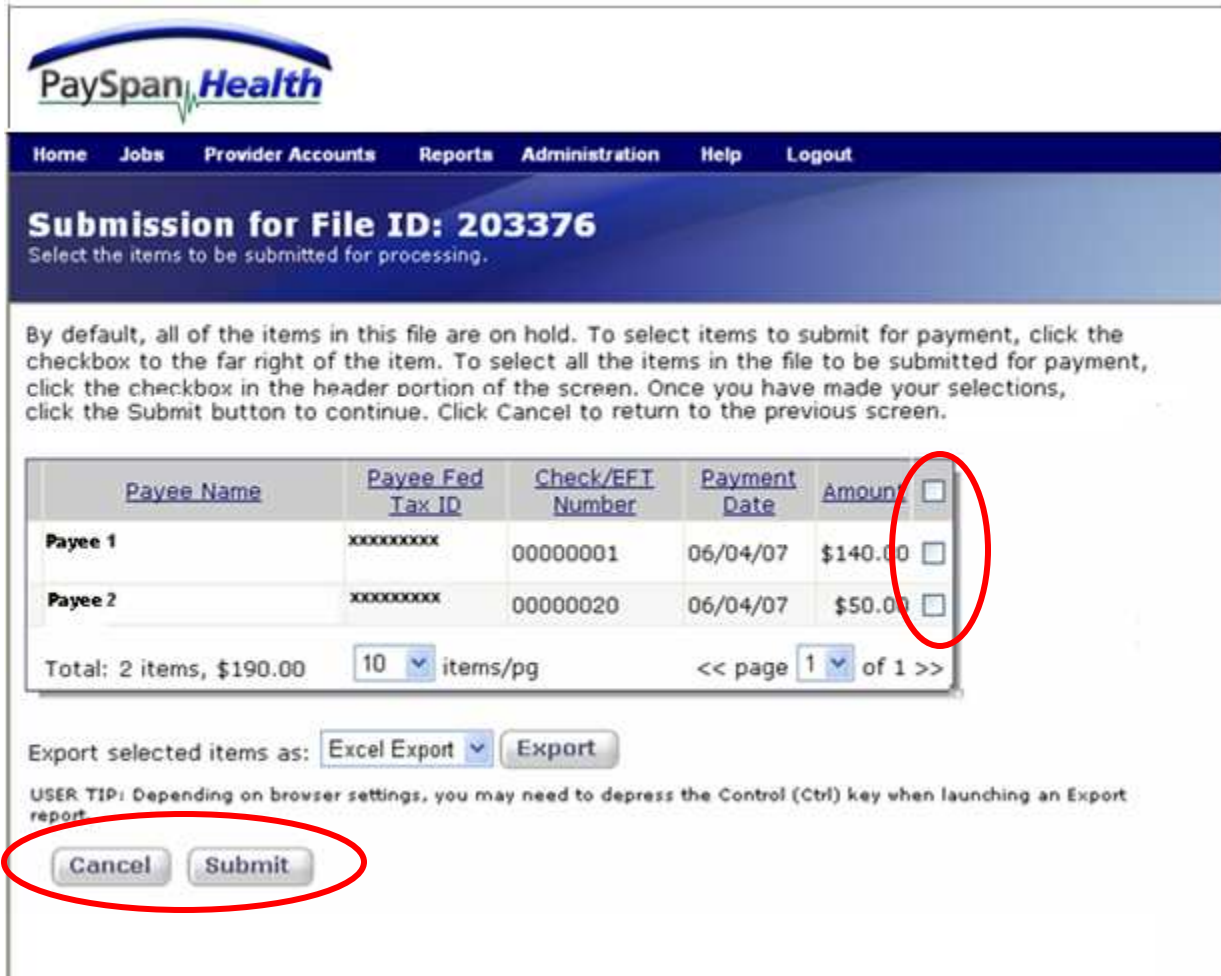Once the Details button has been selected the user will see the Submission for File ID page.

Submission for File ID

From this page, the user can select items by using the checkboxes to export items into an Excel spreadsheet or submit items for processing.

On the Submission for File ID page, select the items to submit for payment by placing a check mark in the box to the right. Checking the box in the gray header field will select all the payments. Checking only the boxes next to an individual payment will result in information regarding the chosen payment only.

After selecting the item to submit, select the **Submit** button.

Submission Summary

Once the user has selected items from a Held File for processing, the **Submission Summary** screen will appear. This gives the user one last opportunity to ensure these items should be removed from hold and sent for processing.

Selecting the Confirm button will move these items into a Job for processing. The Cancel button will cancel the action and leave the items on hold.

Confirm Job Submission

After the user selects the Confirm button, the **Confirm Job Submission** screen will appear. The user can select the OK button to complete the process, or select the View Jobs button to go to the View Jobs screen.

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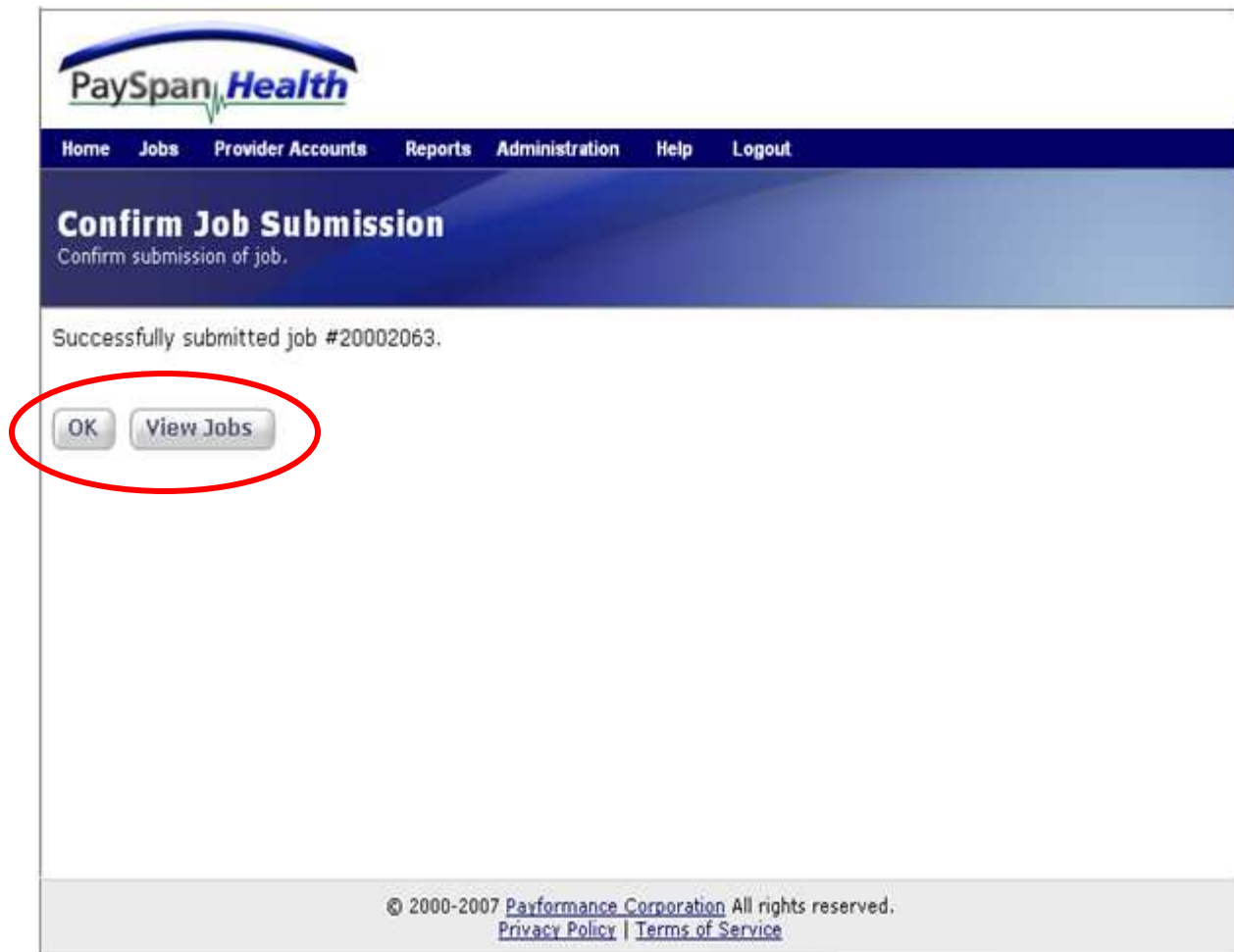
Job Status

When the user selects a Job number from the Home Page, the **Job Status** screen will appear. The Job Status screen allows a user to view specific details regarding a Job, such as the job status, file type, file name, file size and dollar amount.

Selecting the **View Documents** button allows a user to view images of the online presentment for specific items contained in a Job.

View Documents

Once the user has selected the **View Documents** button, the screen pictured below will display.
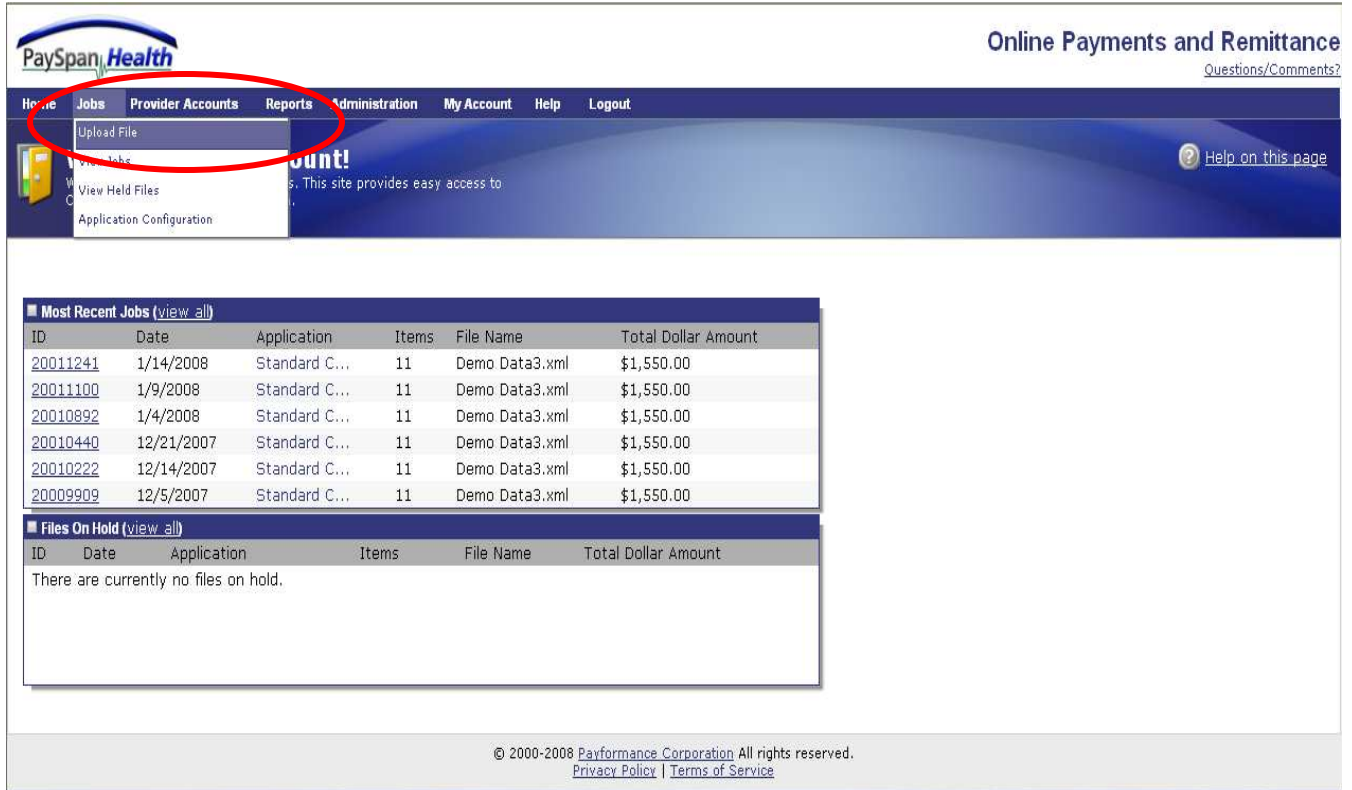

The user can sort the data in each column by selecting the column names.

To view a copy of the original document, select the *View* button to the left of the line of data you wish to review.

The user can also export the data into Excel, HTML or PDF formats. The user can exclude items by un-checking the box to the right of the screen.

Uploading Files

The option to upload a file is found on the Jobs Tab from the navigation bar.

Uploading Files

Typically, files are sent to our secure FTP Site. However, there may be times when a file will need to be loaded manually.

To upload a file, select the Jobs tab - a drop down menu will appear providing various options.
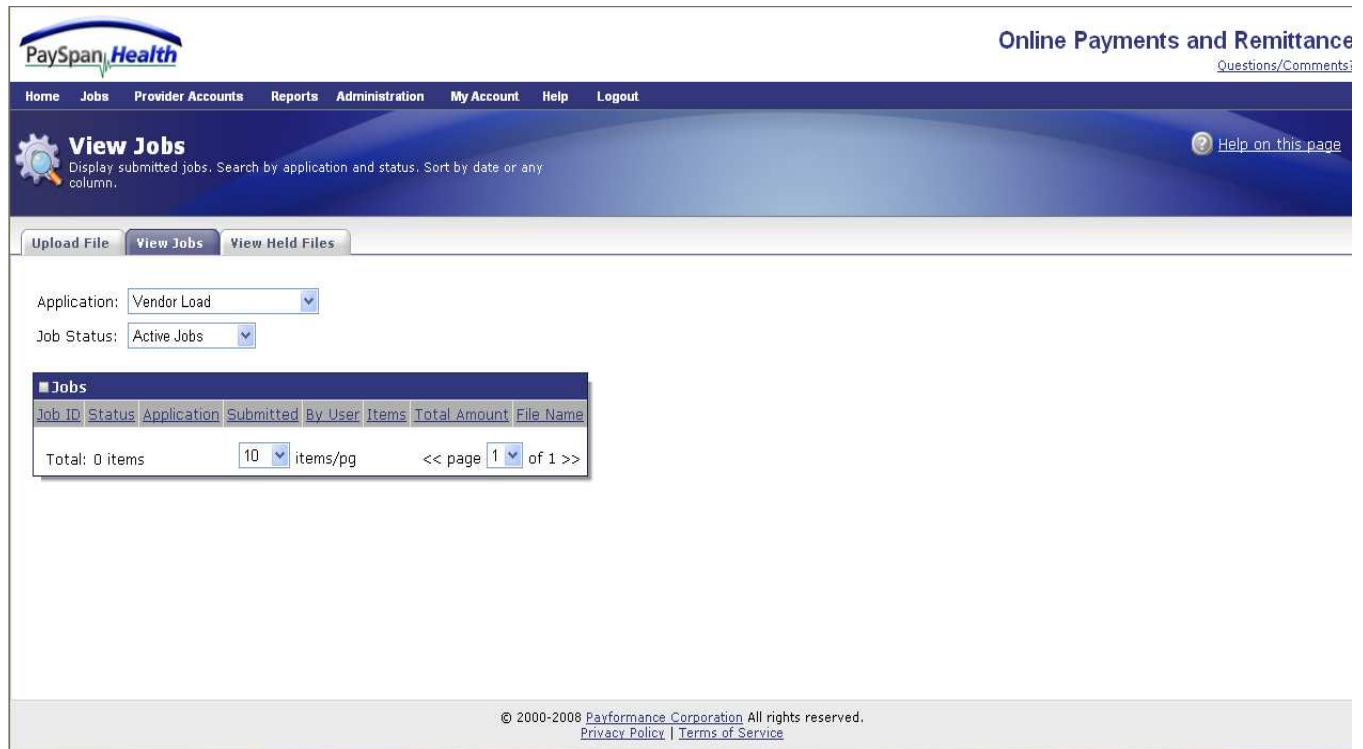
- Select **Upload file**

Selecting the dropdown arrow will provide the various Application options to choose from for uploading a file.

The **Browse....button** provides options to select a file from the desktop or files from one of the network drives.

Select the Upload button to upload the file to PaySpan Health.

View Jobs

By selecting the **View Jobs** tab the following screen will appear:

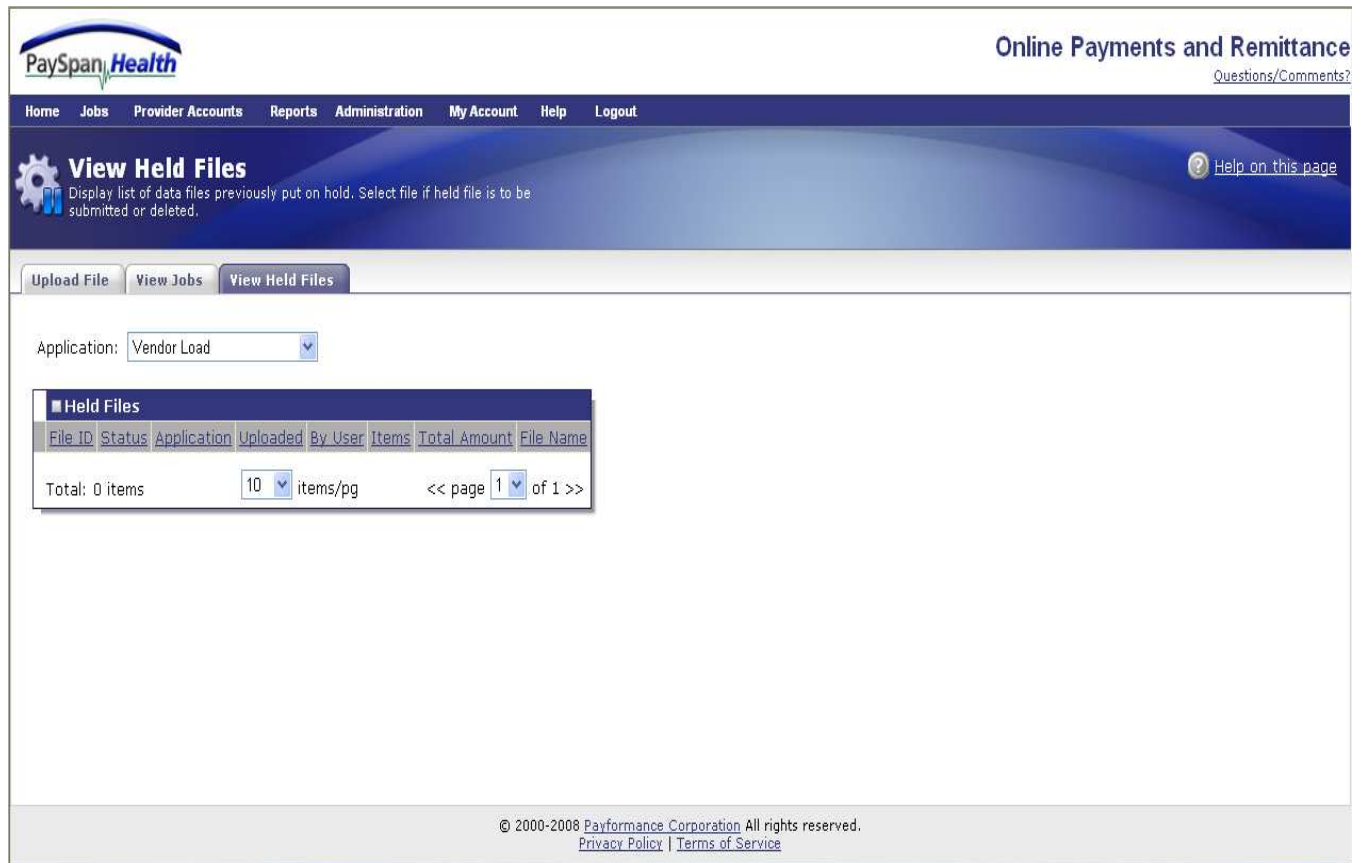The above screen displays the jobs processed.

By selecting a job from the **Job ID column** the **Job Status** screen will display.

Any column can be sorted if the title link is selected.

The dropdown arrows provide other options to choose from when viewing various jobs, whether by **Application** or **Job Status**.

View Held Files

By selecting the **View Held Files** tab the following screen will appear:

This functionality can be used to review files until the user wishes to move forward with processing.

The Held File Functionality is a custom configuration that is available upon request of the Payer.

Application Configuration

The last item to select from the **Jobs** dropdown tab is the **Application Configuration** tab as illustrated below:

Application Configuration

By selecting the **Application Configuration** tab the following screen will appear:

This screen allows the user to view the configuration information for the various applications available.

An application represents a file type of data in the PaySpan Health System. For example, Claims Payments or Accounts Payables are considered applications.

Applications are configured based on customer requirements.
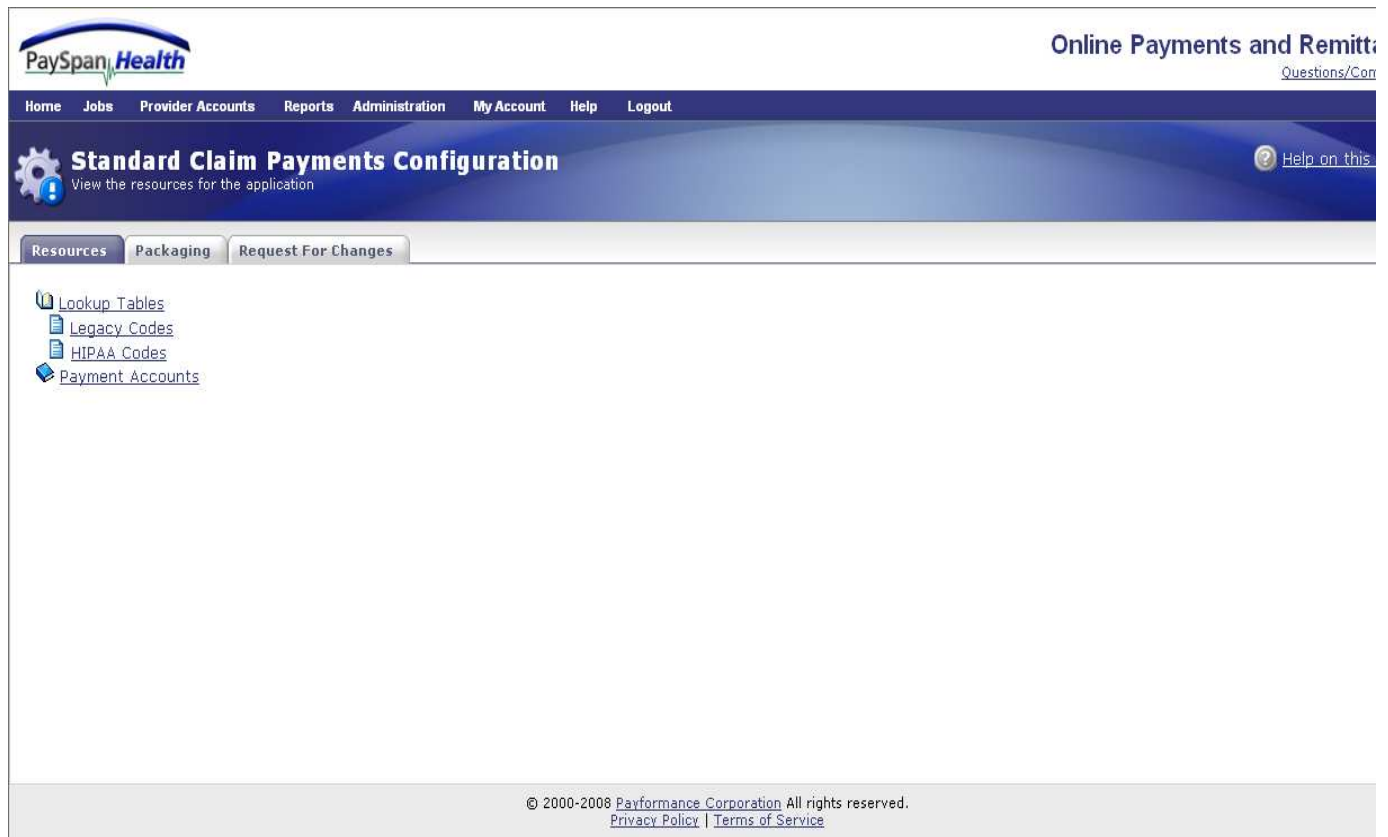
Application Configuration

When selecting one of the Applications from the list, the following screen will appear.

In this case, the Claim Payments configuration was selected.
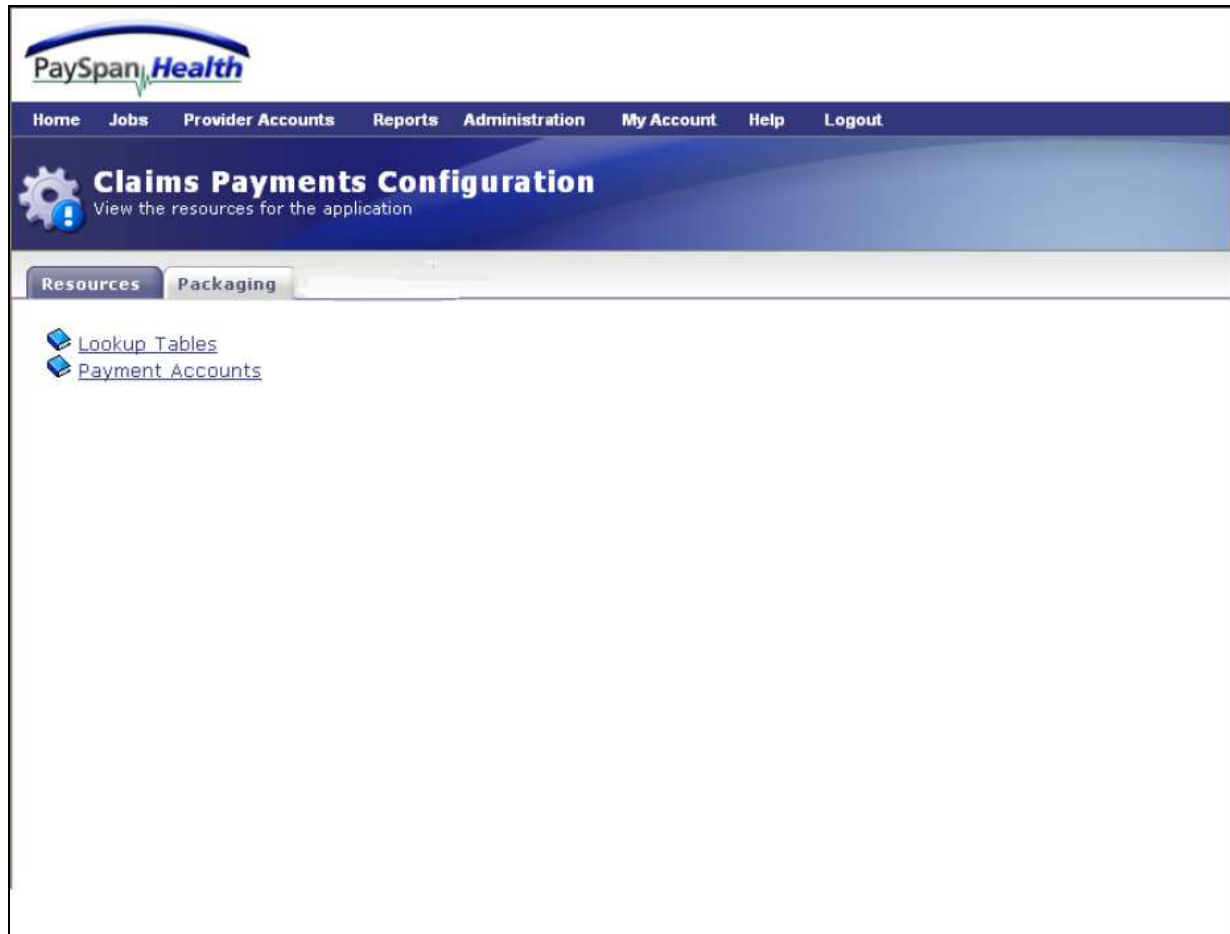
Application Configuration

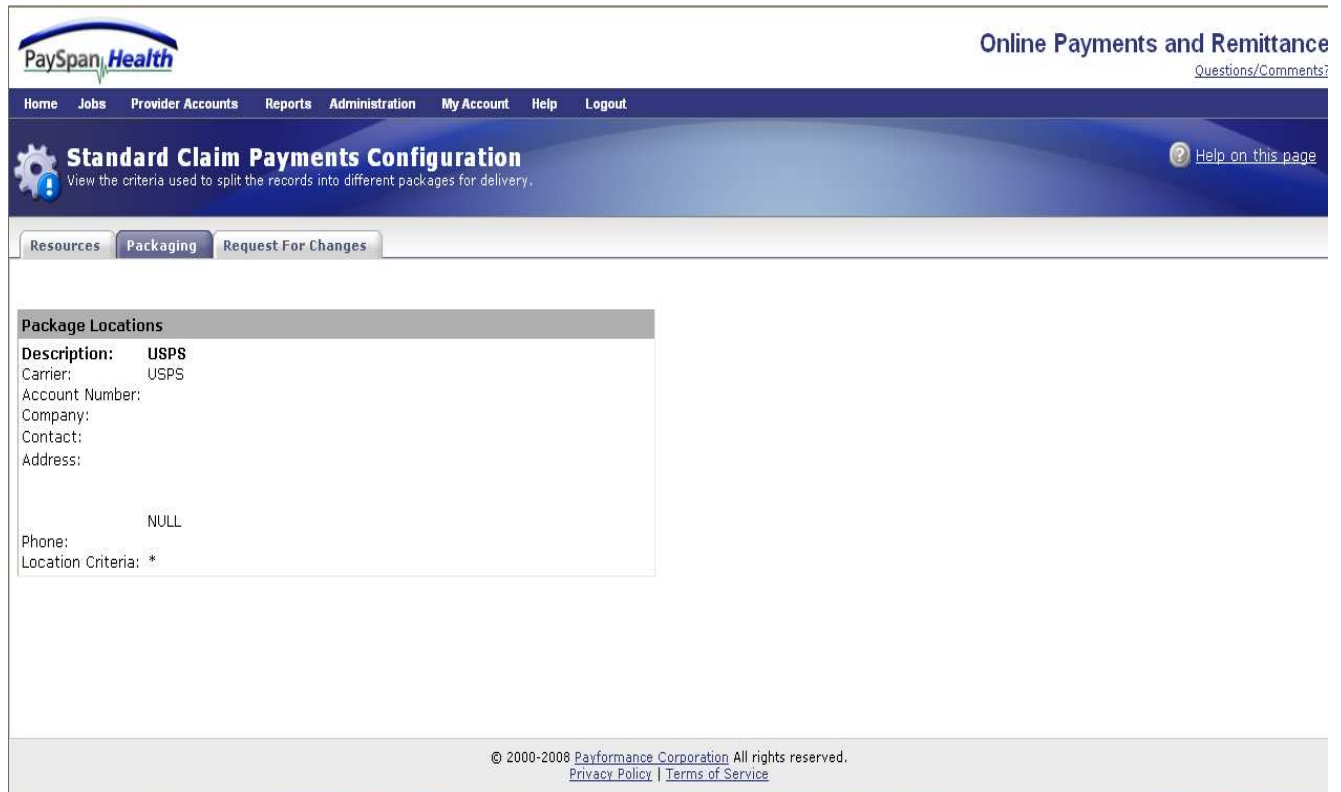By selecting **Lookup Tables** the following screen appears:

Lookup Tables contain data such as Legacy Code or Claim Adjustment Reason Code information.

Application Configuration

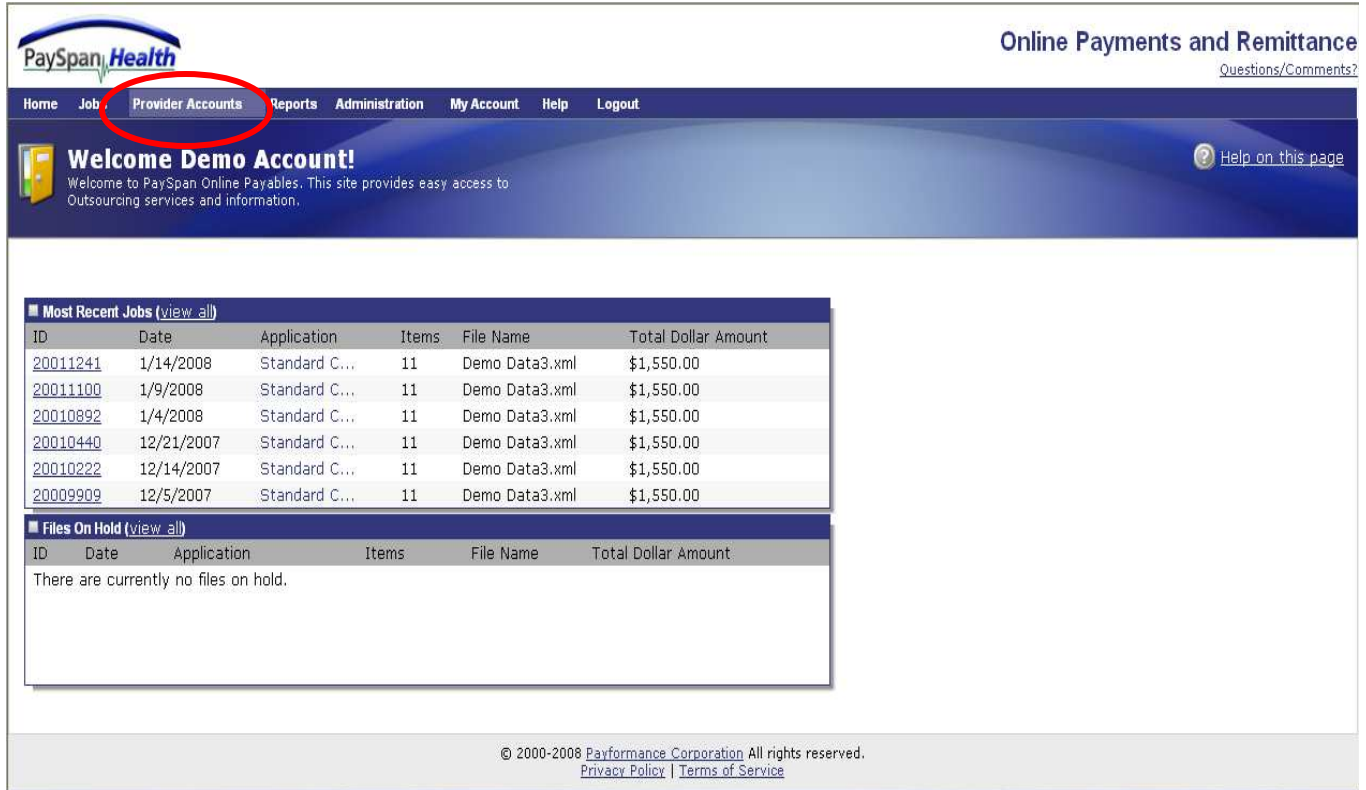By selecting the **Packaging** Tab the following screen will appear:

Package Locations can be used to handle routine occurrences of redirected items.

For example, if a check for a provider must always be mailed back to the Payer, this can be accomplished by creating a package location for the provider.

Package Locations are only used for customers that utilize the Payformance's print service.

Provider Accounts

The Provider Accounts section is accessed from the navigation bar as shown below.

Provider Accounts

This functionality enables the Payer to locate information regarding Provider Receiving Accounts. The user is able to search by provider name, provider address, Receiving Account Name, bank name, bank routing and account number, as well as Legacy Number, TIN and/or NPI. This function requires a user to receive access to the security token Provider Account Access.

In order to perform a search using this tool, the user must select at least one item from the left and one from the right in the Receiving Account Search box.

Provider Accounts

After choosing a selection from both of the columns at the top of the Receiving Account Search box and selecting the Search button, the following results screen will display.
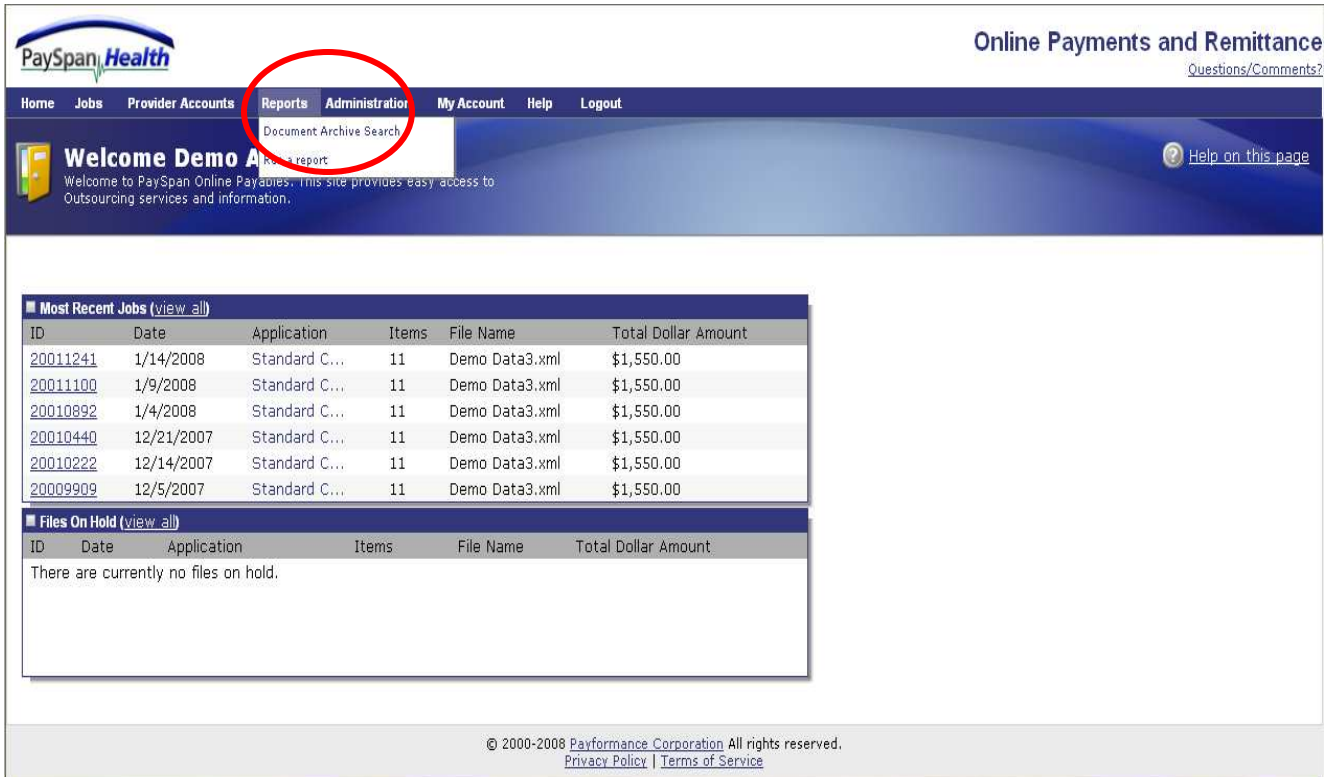
Current Payer Status	Payer Status Last Modified	Current Account Status	Account Status Last Modified	Registration Date	Account Created	Provider/Payee	EFT?	Paper Remit?	NPI	Legacy Number	TIN	Account Name	Bank Routing Number	Bank Account Number	Provider/ Address
Active	5/3/2007	Active	5/14/2007	5/3/2007	5/3/2007	Health Clinic 1	True	False	1234567890	XXXXXXXXXX	123456789	HC1	000000000	####	1234 Mai Jacksonvi 32256
Active	5/7/2007	Active	5/7/2007	5/7/2007	5/7/2007	Health Clinic 2	True	False	0004567890	XXXXXXXXXX	111111111	HC2	333333333	####	456 East Richmond 12345
Active	5/7/2007	Active	5/7/2007	5/7/2007	5/7/2007	Health Clinic 3	True	False	9876543210	XXXXXXXXXX	222222222	HC3	444444444	####	78 West I Cleveland 44194

Reports

The **Reports** tab contains two options as displayed below:

Select **Document Archive Search** from the dropdown option above.

The reports option gives the user the freedom to review history of jobs, research claim payments and other useful information.

Document Archive Search

Searching

A 'wildcard' means you can enter an asterisk where some of the search criteria are unknown. For example, for the last name Smith, you could enter Smit*. Wildcards can be placed at the middle or end of the search criteria.

Character Fields

Character fields in the Document Archive support exact matches, comma separated lists, and wild card searches (*) at the middle and end of the search criteria. Following are examples of search criteria that may be entered for a character field:

- John Doe (this will return all documents that have the exact string "John Doe" in this field)
- John Doe, John Smith   (this will return all documents that have either the exact string "John Doe" or the exact string "John Smith" in this field)
- John*   (this will return all documents with a string beginning with "John" in this field)

Note that some fields are character fields in the system even though they appear to represent numeric data. An example might be a check number or account number. These types of fields are character fields so that leading zeros are preserved and non-numeric characters can be supported if necessary. On the Document Archive screen, the data type for the field is displayed to the right of the field. If the user was searching number and was missing a digit, the digit can be replaced with a wildcard.

Following are examples of search criteria that may be entered for this type of field:

- 001234567 (e.g. for an account number field; this will return all documents with the exact string "001234567" in the account number field).
- 0012* (e.g. for an account number field; this will return all documents with account numbers beginning with "0012")
- 2*,3* (e.g. for an account number field; this will return all documents with account numbers beginning with "2" or "3")

Character Fields - continued

- 101,132,215 (e.g. for a check number field; this will return documents with either "101", "132", or "215" in the check number field)

Date Fields

Users may search on a date field in one of the following three ways:

Single date: Click the first calendar icon to pop up the calendar control and select a date, or enter the date directly in the first text box. Users must have the first radio button selected to enable the calendar controls and their text boxes. This will return all documents that have a date field on this specific date.

Start and stop dates: Use both calendar controls to specify start and stop dates for a custom date period. Users must have the first radio button selected to enable the calendar controls and their text boxes. This will return all documents with a date that is on or between these two dates.

Relative date period: Select the "Date Period" radio button to enable the date period drop down box. Select either 'Today', 'This Week', or 'This Month' from the drop down box. These date periods are relative to today's date. This type of search is especially useful for saved queries, where users want the search to always be relative to the day the query is run.

Numeric Fields

Numeric fields support exact matches, comma separated lists, and numeric ranges. Dollar amounts are generally stored as numeric fields in the system. Dollar sign and commas should not be used in the search fields.

Note: The only possible use for a comma in the search field is to indicate an either/or amount. For example, entering 100,567.89 will return all the payments that have either the exact value of 100 or 567.89.

Following are examples of search criteria that may be entered for a numeric field:
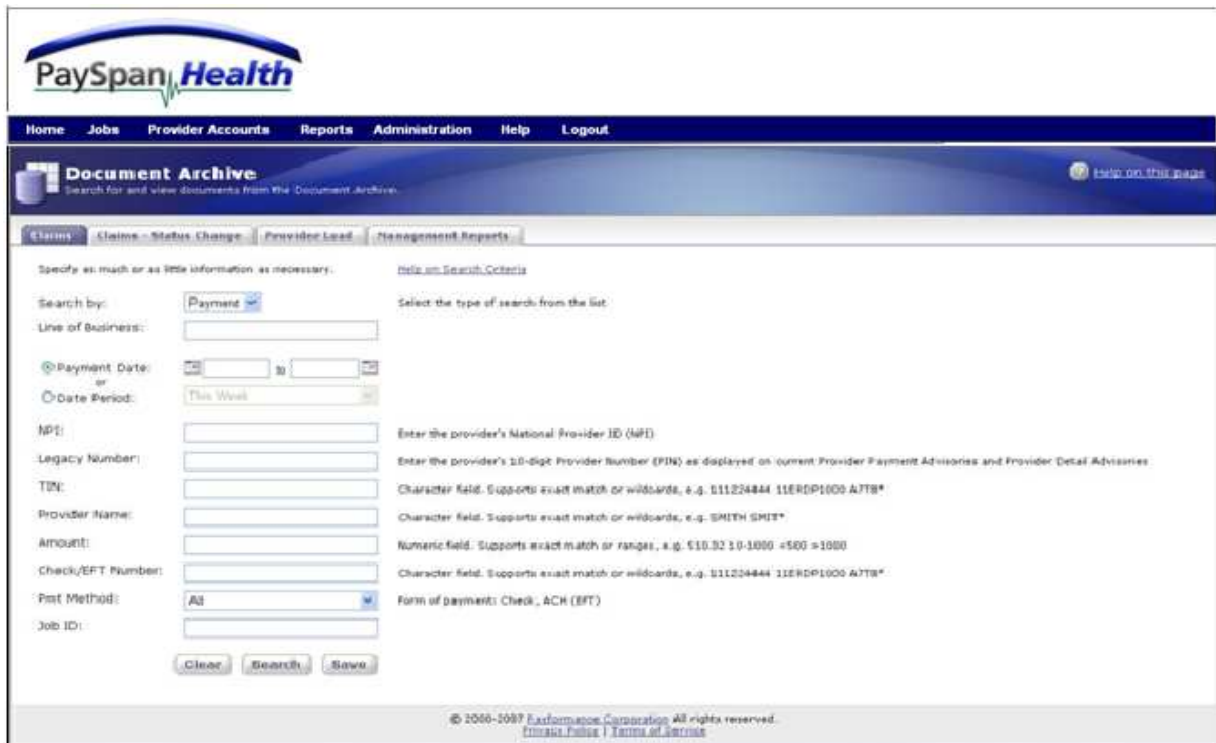
- 541.13 (This will return all documents that have the exact numeric value 541.13 in this field).

Numeric Fields - continued

- 10,1000 (This will return all documents that have either the exact value 10 or the exact value 1,000 in this field).
- 10-1000 (This will return all documents with a value in this field that is between 10 and 1,000).
- <100 (This will return all documents with a value in this field that is less than 100).
- >3000 (This will return all documents with a value in this field that is greater than 3,000).

Search by Payment

In Document Archive Search, users can search by Payment or Claim.

Document Archive Search allows users to search for information on payments based on criteria entered. Using the Amount field enables users to search for entire check payment amounts, not individual payments on claims.

Search by Payment - continued

Below is the result of a Document Archive Search by Payments.

The user can uncheck the top box to deselect all checked boxes, or select certain lines by checking the box for the line item.

The results can be exported into a report in Excel, HTML or PDF.

The return button takes the user back to the previous screen.

Any column selected can be sorted by selecting the link above that column. When selecting the View link from the left side of the screen a screen will appear for that claim as shown on the next page.

Explanation of Payment View

This view allows the user to focus on an individual claim and how it was adjudicated.
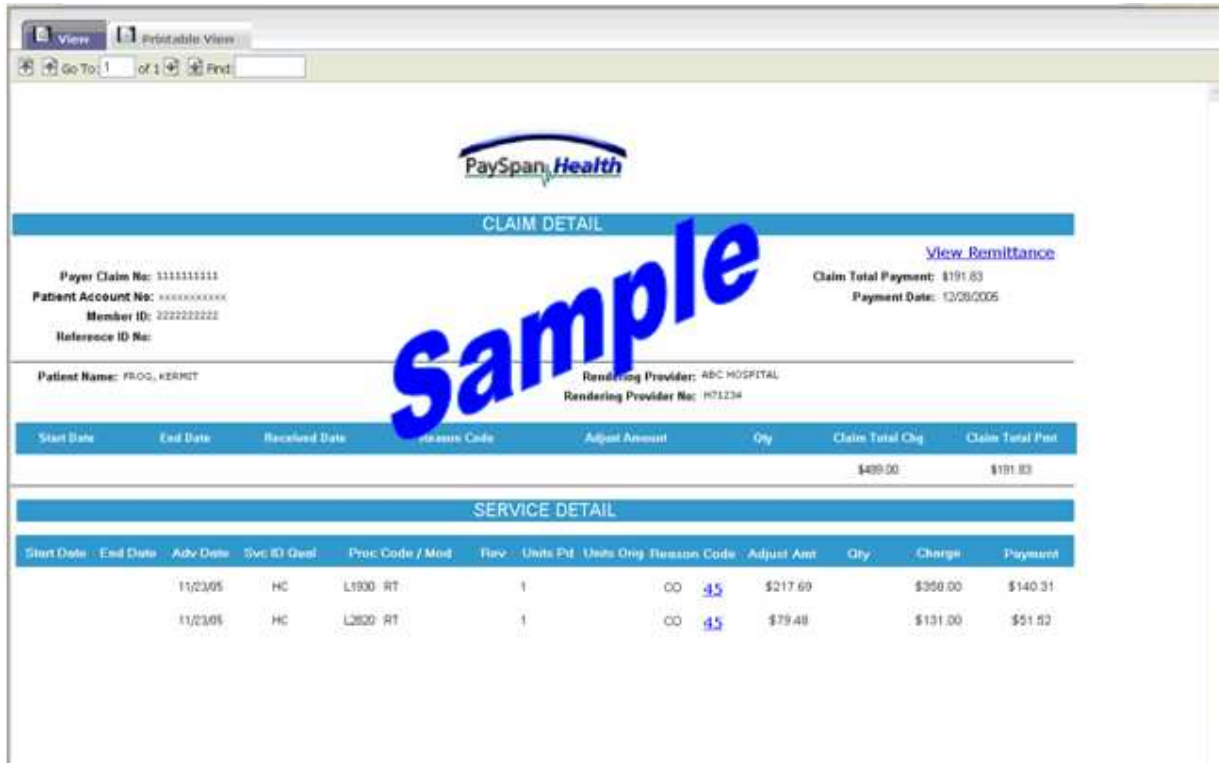
By selecting the claim number link, the user can view the reason code for the adjustment listed on the claim. The screen that displays once the claim number has been selected is pictured on the following page.

Claim Detail View

The user can select the link for the reason code to obtain the description of the reason code. Select the View Remittance link to go back to the remittance advice.

A pop-up box will appear on the screen displaying the description of the reason code.
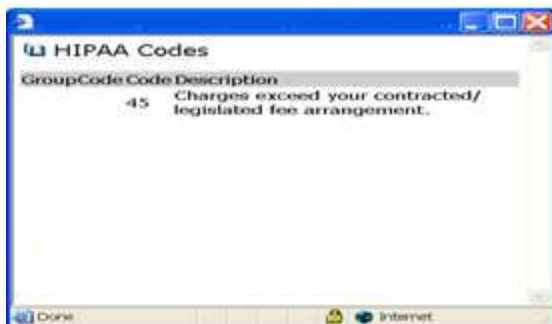
Please Wait Message

When a user chooses to view a document or change to a different tab in the Document Viewer, the verbiage "Please Wait" along with an activity indicator shows while the request is processed. Once the processing is complete, the document will appear.

If the request for the document has already been opened and saved in the system, then no activity indicator will show and the requested information will be shown immediately.

The amount of time needed to generate reports will vary based on report size. The report requested will continue to generate until it is complete.
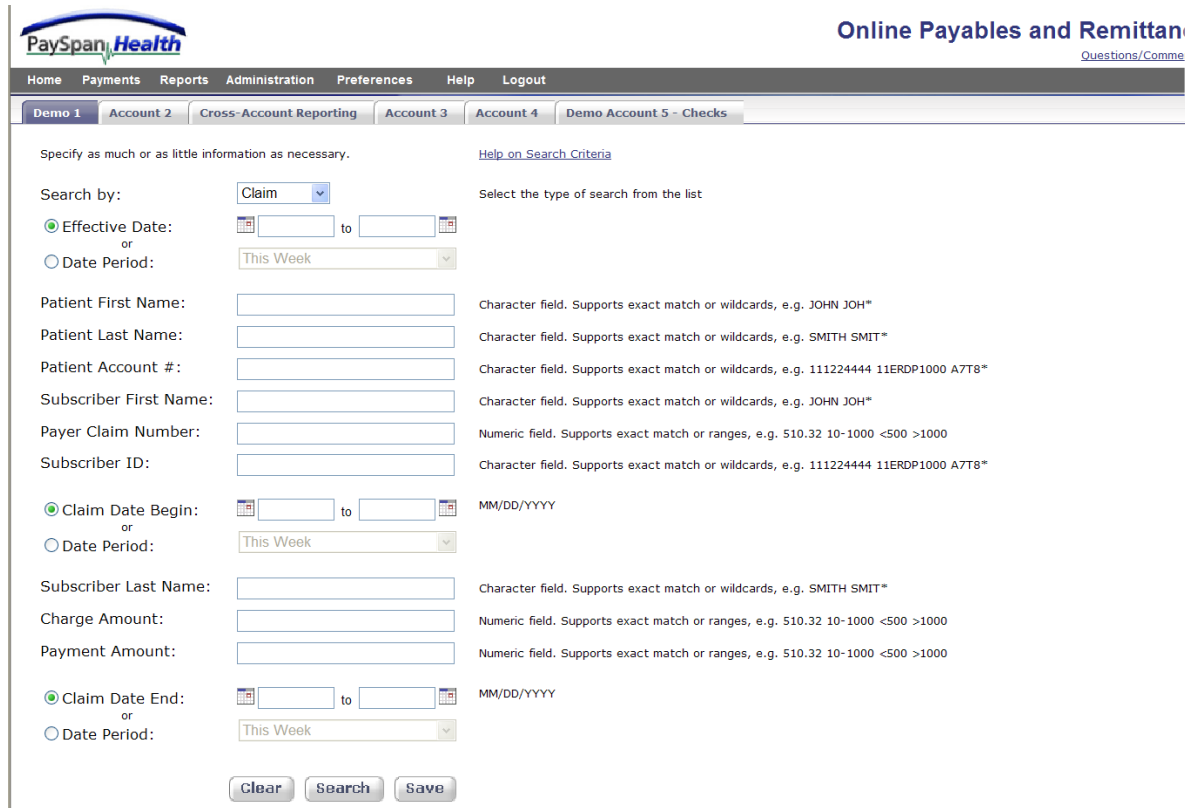
The user has the following options while waiting for the report to generate:

- Wait for the report to generate until it appears.

- Minimize the browser. The user will still be able to navigate in PaySpan Health while the report is generating.

- Close the browser and return to PaySpan Health at a later time. The user will need to enter their search criteria again, select the View link and the report will display once complete.

If there are any questions, please do not hesitate to contact our Support Center by dialing 1-877-331-7154 or by email at providersupport@payspanhealth.com.

Search by Claim

In Document Archive Search, users have the ability to search for claims data.

Document Archive Search allows users to search for information on claims based on criteria entered. Using the Amount field enables users to search for payment amounts (or zero dollar amounts) on claims.

Search by Claim – continued
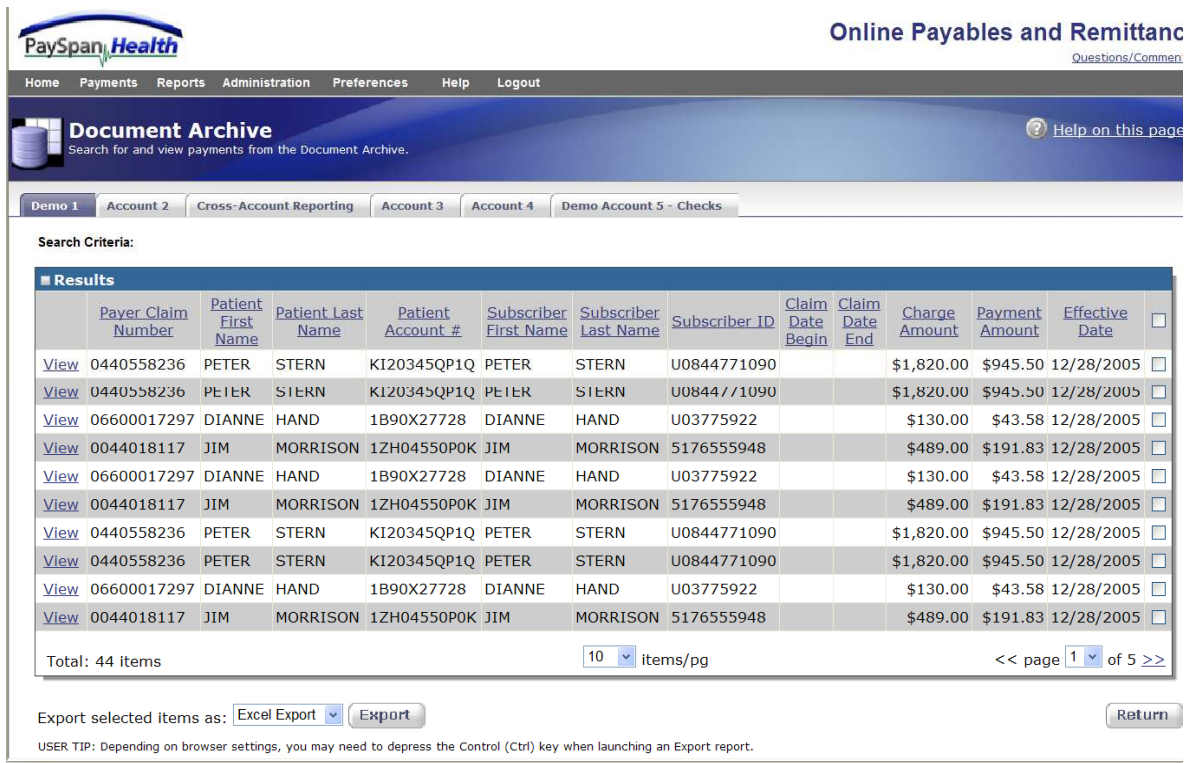
Below is the result of a Document Archive Search by Claims.

The user can uncheck the top box to deselect all checked boxes, or select certain lines by checking the box for the line item.

The results can be exported into a report in Excel, HTML or PDF.

The return button takes the user back to the previous screen.

Any column selected can be sorted by selecting the link above that column. When selecting the View link from the left side of the screen the Claim Detail screen will appear.

Management Reports

The Management Reports tab on the Document Archive screen is shown below.

For Management Reporting, the user can search by Provider Usage, Provider Claims or Package Location.

Management Reports

A view of the Management Reports Tab in the Document Archive screen can be seen below. For Management Reporting, the user can search by Provider Usage, Provider Claims or Package Location.

Provider Usage Report

The provider usage report is a management tool that allows users from the payer site to monitor the number of times a provider has utilized or logged into the PaySpan Health system. Each record or line of data will include results that render based upon the following data set: user name, Legacy Number and TIN combination.

In this example, one specific TIN search renders four separate results with one user name. While each line of result has the same user name, we are able to track usage more accurately because the results rendered also include the unique Legacy Number and TIN combination. John Doe logged into the system under his user id john_doe@abc.com eight times.*   Since the Legacy Numbers 0000000001, 0000000002, 0000000003, and 0000000004 (with TIN123456789) are all connected to his user name; we see the number of logins for each combination reflected as eight. Also, all four of the Legacy Number/TIN combinations were enrolled on 12/07/2006, which also happens to be the last time this user logged into the system. Should John log in another time, the "last login date" field will be updated to the current date for all of the Legacy Number/TIN combinations present.

Provider Usage Report - continued

*The "number of logins" field is based upon the actual number of times a user logs into the system.
**The "enrollment date" field is based on when the provider initiated their registration process in PaySpan Health.

Searching by Provider Usage allows the Payer to obtain the following specific information regarding their Providers:

- The date the Provider registered with PaySpan Health.
- The first time the Provider logged into their PaySpan Health account or initiated registration.
- The last time the Provider logged into their PaySpan Health account.
- The date the Provider un-enrolled with PaySpan Health, if applicable.
- The total number of times the Provider has logged into their PaySpan Health account.

In addition to this information, the screen displays the Provider name, address, Administrator user name and payee ID.

Provider Claims Report

The provider claims report is a management tool that allows users from the payer site to review specific claims information in regards to their providers in the PaySpan Health system. Each record or line of data will include results that render based upon the following data set: claim number, charge amount, payment amount and legacy number.

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Provider Claims Results Screen

In the example below, claim number 12312312312312 was entered into the search screen:

As shown above, results render for ABC Clinic with an overview of the claim information associated with that claim number.

Provider Claims Results Screen - continued

In the next example, Legacy Number 0000000001 was added to the search criteria:

Provider Claims Results Screen - continued

This functionality is beneficial to Payers as the information rendered shows specific payments that were rendered to a particular provider.

As with the Provider Usage Report, this information can be exported into Excel, HTML, or PDF. Users can also further expand or narrow their search criteria (for example, if the Payer wanted to see all claims adjudicated for a specific State).

Searching by **Provider Claims** allows the Payer to obtain specific information regarding Providers as follows:

- History of Claim Activity.
- Corresponding Claim Numbers.
- Total Claim Charge Amounts.
- Total Paid Amounts.

This information can be exported from Document Archive into an Excel report if desired.

Package Location Report

Package Location Report allows users to search for Payees that are currently modified for delivery to a certain Package Location.

Provider Load

In this second example, one specific TIN search again renders four separate results, but this time, with two user names. John Doe logged into the system under his user id john_doe@abc.com four times. Since the Legacy Numbers 0000000001, 0000000002, 0000000003, (with TIN 123456789) are all connected to his user name; we see the number of logins for each combination reflected as four. Sam Wright, on the other hand, logged into the system using his user id sam_wright@xyz.com. Since the Legacy Numbers 0000000004 (with TIN 123456789) is connected to his user name, we see the number of logins for that combination reflected as two.

Should either John or Sam log in another time, the "last login date" field will be updated to the current date for all of the Legacy Numbers/TIN combinations present for their specific user IDs.

Search results rendered can be exported into Excel, HTML, or PDF.

Run a Report

The screen below displays the Run a Report option available from the
Reports Tab.

Run a Report

If the user has already saved custom reports, the names of the reports will display here.

The administrator of the account has the option to grant or decline access to specific reports to certain individuals in the office. To grant access to reports, go to Security Administration under the Administration tab.

To add a new report to the list, select the **Add** button.
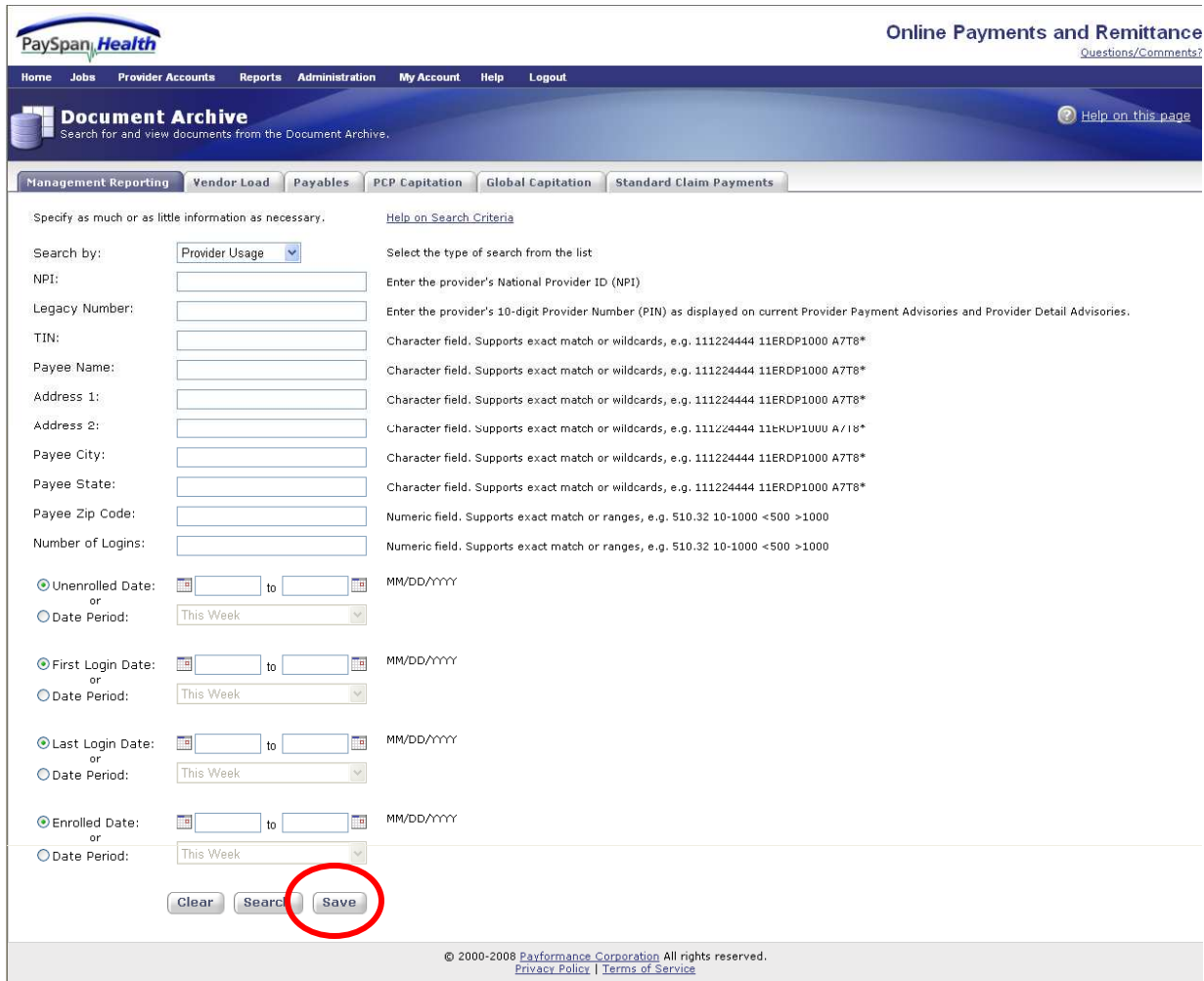
Run a Report

Once the Add button in the Run a Report tab has been selected, the user can complete the information below and choose the **Save** button to save the query as a saved report.

Save/Edit Report

Users can save reports in the PaySpan Health System and set them to run automatically.

A private report is a report where the user does not wish to share the report with others.

A shared report is a report that others can view and also run.

Only the report owner can edit or delete their reports.

Administration

The administrator of the account will have full rights to all access of the system. It is recommended that at least two users have full administrative rights.

The following options are available from the Administration Tab:
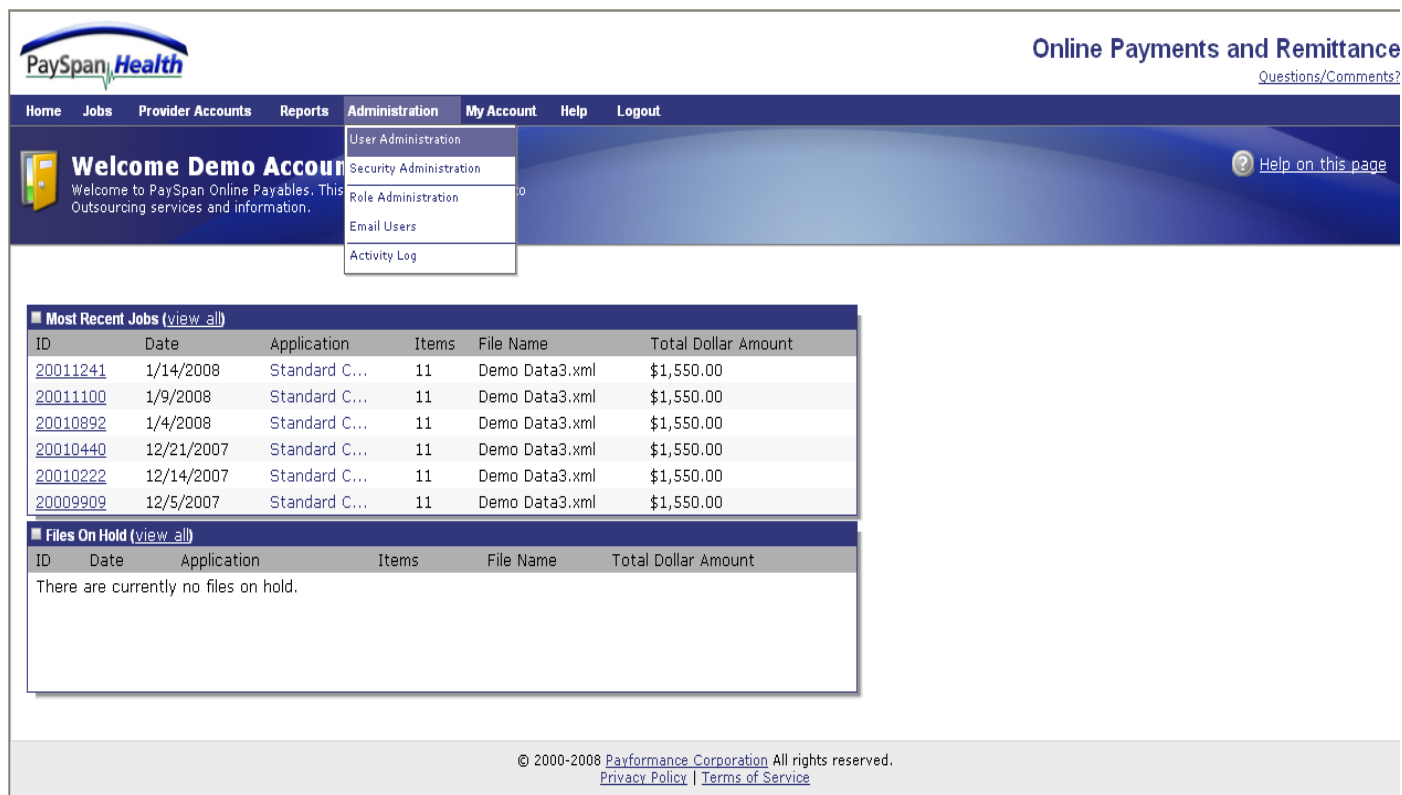
User Administration – To add new users or to deactivate users.

Security Administration – To assign levels of access to specific users.

Role Administration – To create, edit or deactivate specific user roles.

Email Users – To send a message to active or inactive users or both.

Activity Log – To review history of activity by a specific user or all users.

User Administration

Below is the User Administration screen. This screen allows the administrator to add new users to the system, change passwords for users, edit access of users and deactivate users.

To deactivate a user, select the user name and uncheck the active box.

To change a user's password, enter a password in the password fields and check the 'password expires next logon' box.

An example of the Add/Edit User screen is pictured on the following page.

Add User
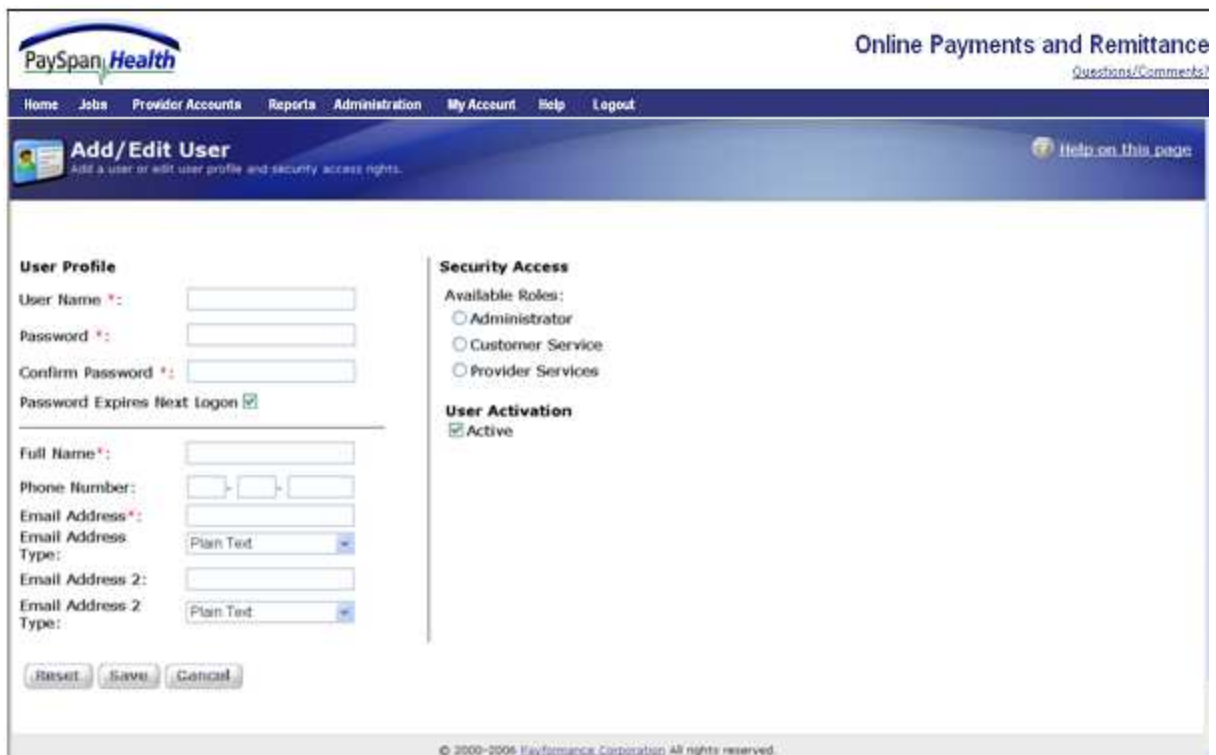
The User Name should be the User's email address. This helps users remember their User Name more easily.

The password should be at least 8 characters in length, with alpha and numeric characters combined.

When the Administrator adds a new user, the 'Password Expires Next Logon' box is automatically checked for security purposes.

The Administrator must choose what level of access a new user should have. Available Roles may vary depending on the use of the PaySpan Health system.

Required fields are indicated by a red asterisk. (*)

Security Administration

To access the Security Administration section of the system, choose the Administration tab, and then Security Administration.
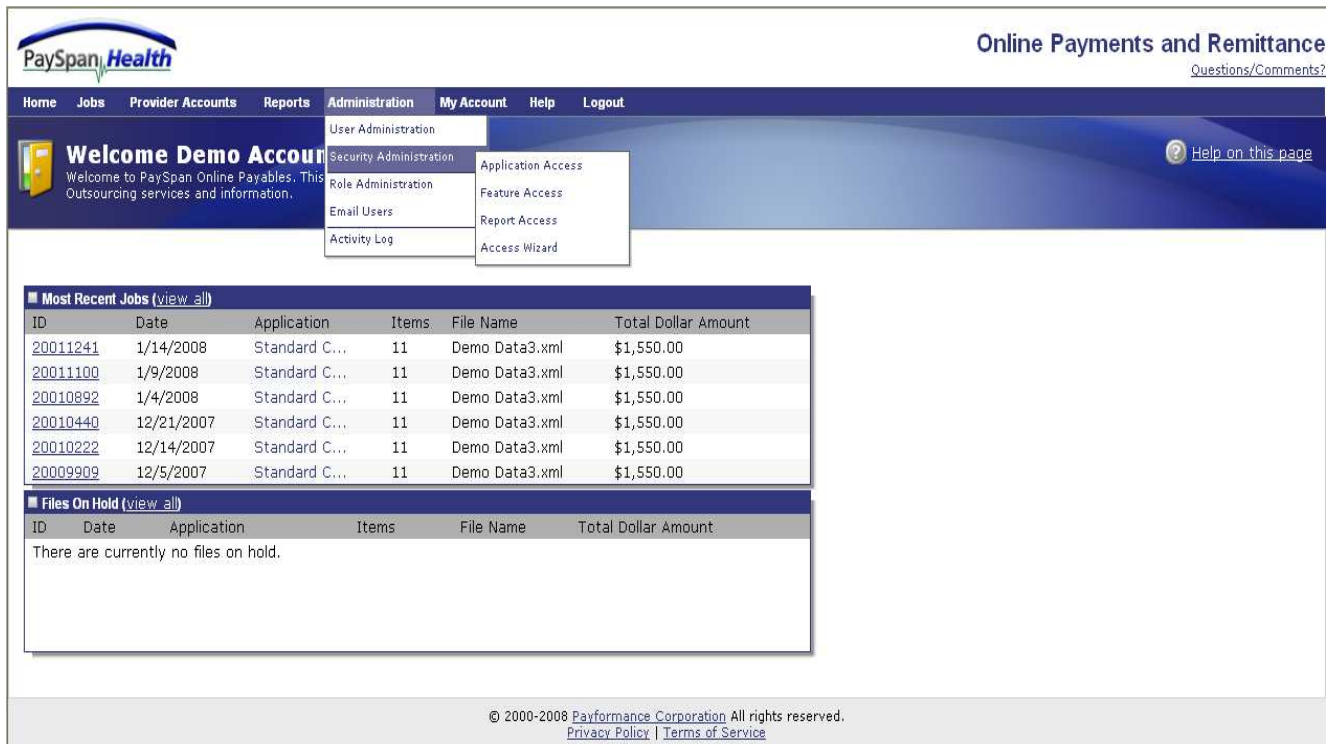
The Security Administration option breaks out into four choices:

Application Access – To allow users access to specific applications.

Feature Access – To allow users access to specific features.

Report Access – To allow users access to Shared Reports.

Access Wizard – To assign users access to applications, features and reports in just three easy steps.

Application Access

To assign access to a specific user or users to a certain application, simply select the arrows to move them to the selected roles side.

In this example, all of the selected roles have access to the Management Reporting application.

Feature Access

To assign access to a specific user or users to a certain feature or features, simply select the arrows to move them to the selected roles side.

In this example, the Administrator has access to the Upload Files feature access.

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Report Access

To assign access to a specific user or users to a certain report or reports, simply select the arrow to move them to the selected roles side.

In this example, only the Administrator has access to the 4thQtrPmts2 Custom Report.
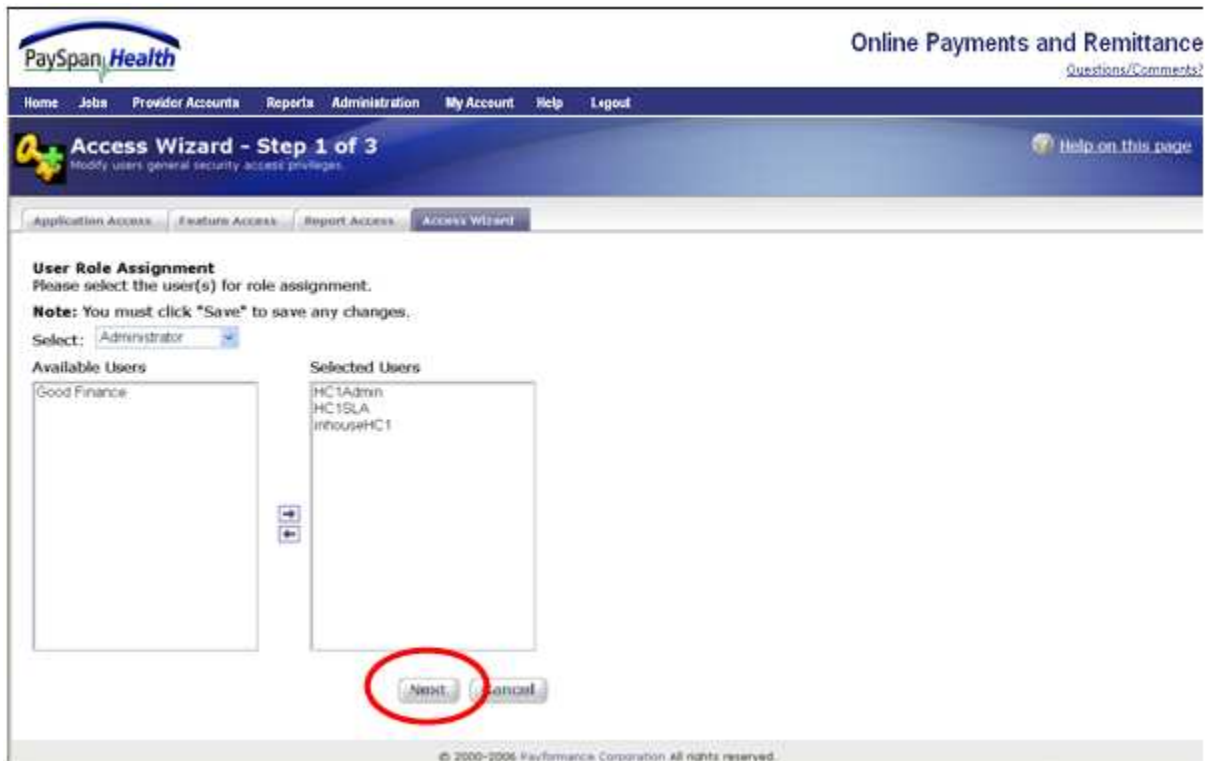
Access Wizard

Step One of Three

The Access Wizard allows the Administrator to set up users with Application, Feature and Report Access at the same time.

Simply use the arrows to move users from one side to the other.

Once done, select the Next button.

Access Wizard

Step One of Three

In Step One of the Access Wizard, the Administrator selects the Application, Feature and Reports access the User will need. When finished, the Administrator should select the Next button.

Access Wizard

Step Two of Three

In Step Two of the Access Wizard, the Administrator verifies the Application, Feature and Reports access the User has is correct. When finished, the Administrator should select the Next button.

Access Wizard

Step Three of Three

In Step Three of the Access Wizard, the Administrator confirms that the Application, Feature and Reports access the User will need is correct. When finished, the Administrator should select the *Confirm* button.

Role Administration

The Payer has the rights to modify an existing Role in Role Administration. This can be done by selecting the Role Name, which takes the user to the Add/Edit User Screen.

The Payer can also deactivate a role if needed by clicking the Role Name, unchecking the active checkbox, and clicking Save. All users assigned to a Role must be changed to other Roles before a Role can be deactivated.

To add a new Role, select the **Add Role** button.
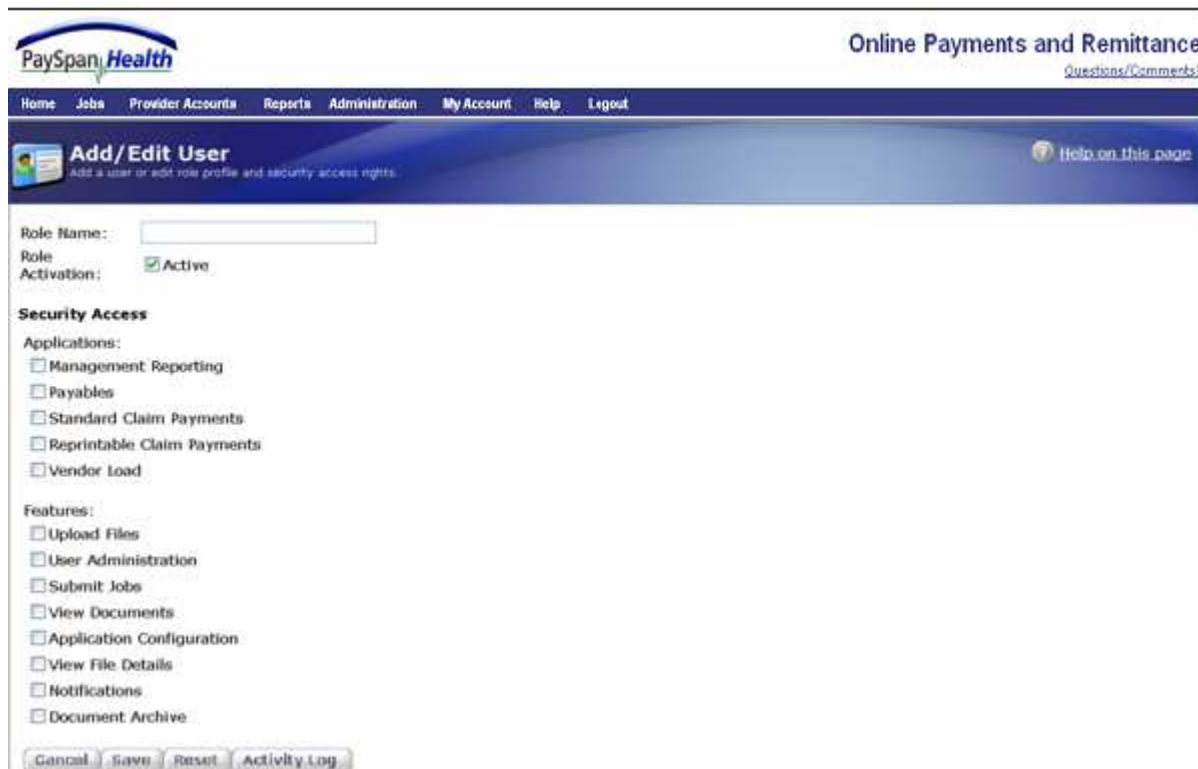
Add Role

To create a new Role, enter the Role Name in the designated box. The Role Activation Box will automatically be checked when creating new roles.

Select the Application and Feature access desired for the Role and then select the Save button.

Security Access Levels

Applications:

Applications are the names of the file types that will be processed. Giving a user access to an application allows them to view data associated with that application.

Features:

Upload Files – Allows a user to Upload a file for processing by the PaySpan Health System.

User Administration – Allows a user to add additional users to the system, deactivate users, change user access and user passwords, send email messages to system users and view the activity log for all users.

Submit Jobs – Allows a user to submit a job for processing by the PaySpan Health System.

View Documents – Allows a user to view individual online presentation of documents.

Application Configuration – Allows a user to view the way applications are configured.

Notifications – Enables a user to receive email notifications regarding their account.

Document Archive – Enables a user to review archived documents by entering specific criteria.

Provider Accounts – Enables a user to obtain information for Provider Receiving Accounts.

Shared Queries:

These are customized reports that can be shared among users by granting them access in Reports Access. This option will only display if there are Shared Reports available.

User Activation

This box will be checked automatically upon adding a new user. Should the employee leave the company, this box should be unchecked to deactivate the user.

Email Users

The Email Users feature allows the Administrator to send a message to Active, Inactive or Both types of users of the PaySpan Health System.

Activity Log

The last choice on the Administration Tab is the Activity Log. The Activity Log displays all system activity. These events cannot be deleted or edited in any way. Only an Administrator can view user activity.

Users can filter by user to review a single users' activity if desired.

Users can also filter by date in the Activity Log.

All activity will always display in the Activity Log and is never removed or purged.

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My Account

Below is the *My Account* Tab as seen from the Home Page.

My Account is where a user can edit their user name, email address and change their password.

Edit Profile

Below is the Edit Profile screen. Edit Profile is where a user can edit their user name, change the user email address or change the challenge question and answer.

Change Password

This is the *Change Password* screen.

Users can change their password at any time - provided they remember their old password.

The password needs to contain at least 8 characters, at least one capital letter, and at least one number.

Password changes are required every 90 days.

Help

Users can get help by selecting the Help tab from any screen.

The User Guide is available for download from the Help Menu. Both the Provider and Payer Guides are available.

Help

The PaySpan Health Help Files can guide the user through the PaySpan Health site.

Export Formulas

Users can view the format specs for the Export Formula file type from the Help Tab.
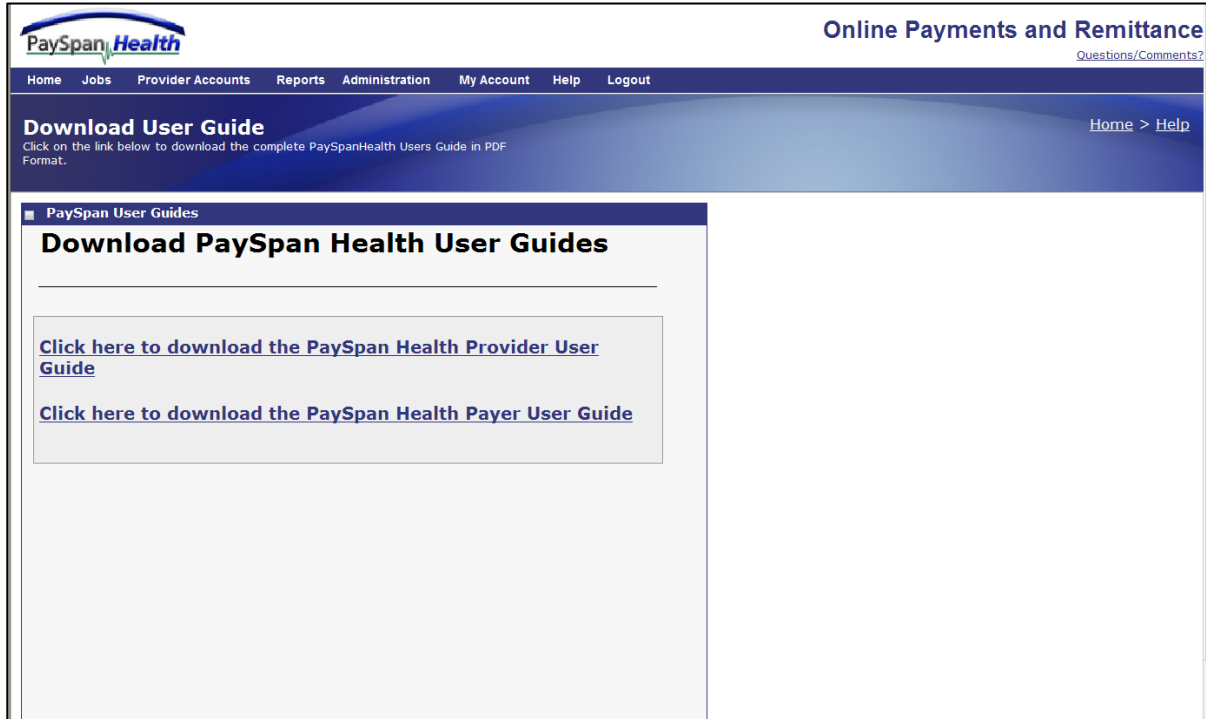
Download User Guides

Payer Site Users have the ability to download a PDF version of the Payer or Provider Guide from the Help Menu.

Questions/Comments

On every page of the PaySpan Health application, there is a questions and comments link. Use this link to send a message to the PaySpan Health Client Support Center.

Log Out

Users can log out of the system at any time by selecting the Log Out option, or by closing the browser.

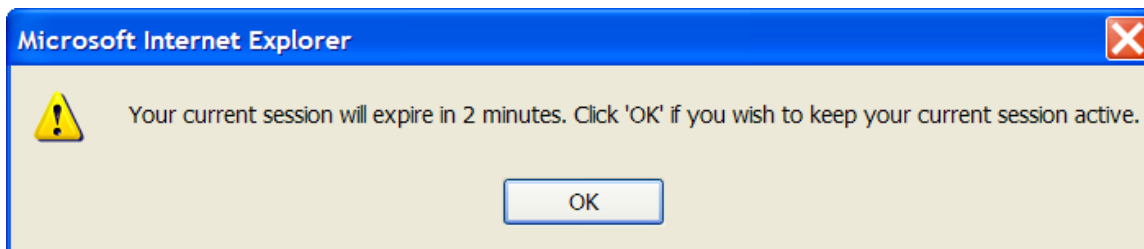The PaySpan Health System will automatically end a session if left idle for 20 minutes or more. The message below will display on the screen when the system has been left idle and is about to time out.
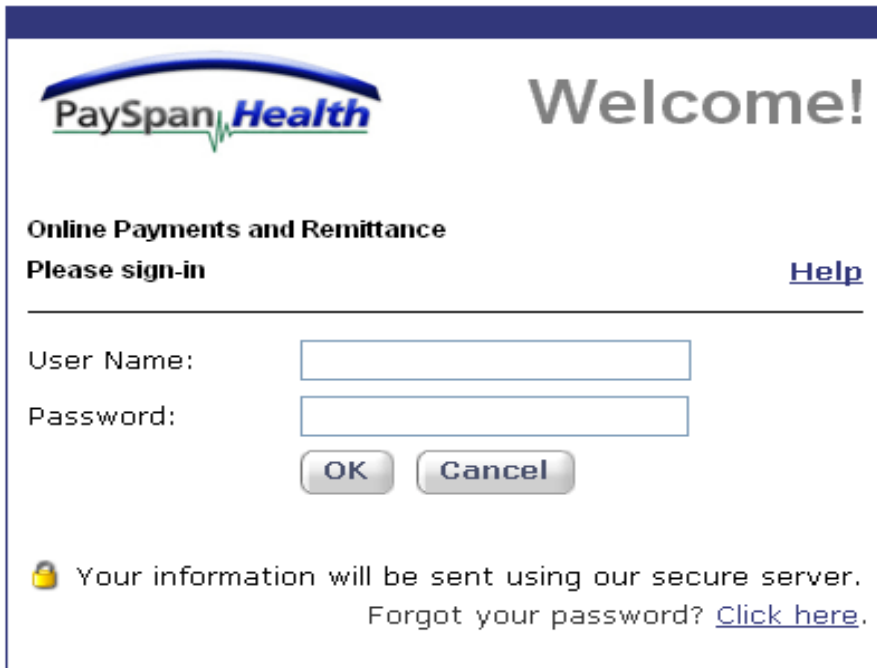
Log Out

Once the user has logged out of the system, the below screen will display.

To log in again, select the Login Again link.

Forgotten Passwords

If a user has forgotten their password, they can select the link next to the 'Forgot your password?' text on the Sign-In screen.

The user will be prompted to enter their email address and answer their challenge question.

Users who are unable to reset their own password should seek assistance from their system administrator.