EDI Support Services

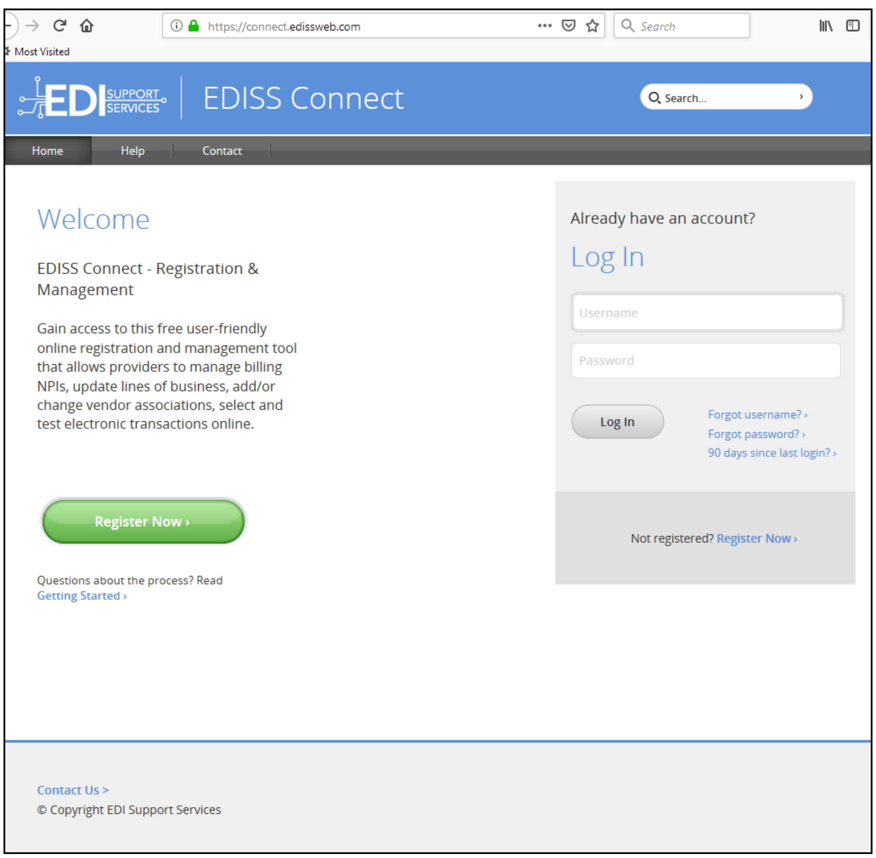
User Documentation: EDISS Connect User Manual for Vendors

EDISS Connect is a user-friendly, online registration and electronic claim testing system. Vendors use it to register with EDISS, add users, manage providers and to manage a transaction catalog. The system also allows Vendors to test claim files for electronic submission for Non-Medicare lines of business or to be granted blanket approval for all transactions.

Web Site Address/URL

https://connect.edissweb.com

Note: *Internet Explorer and Fire Fox are the recommended browsers. The use of other browsers may cause issues.*



In this document:

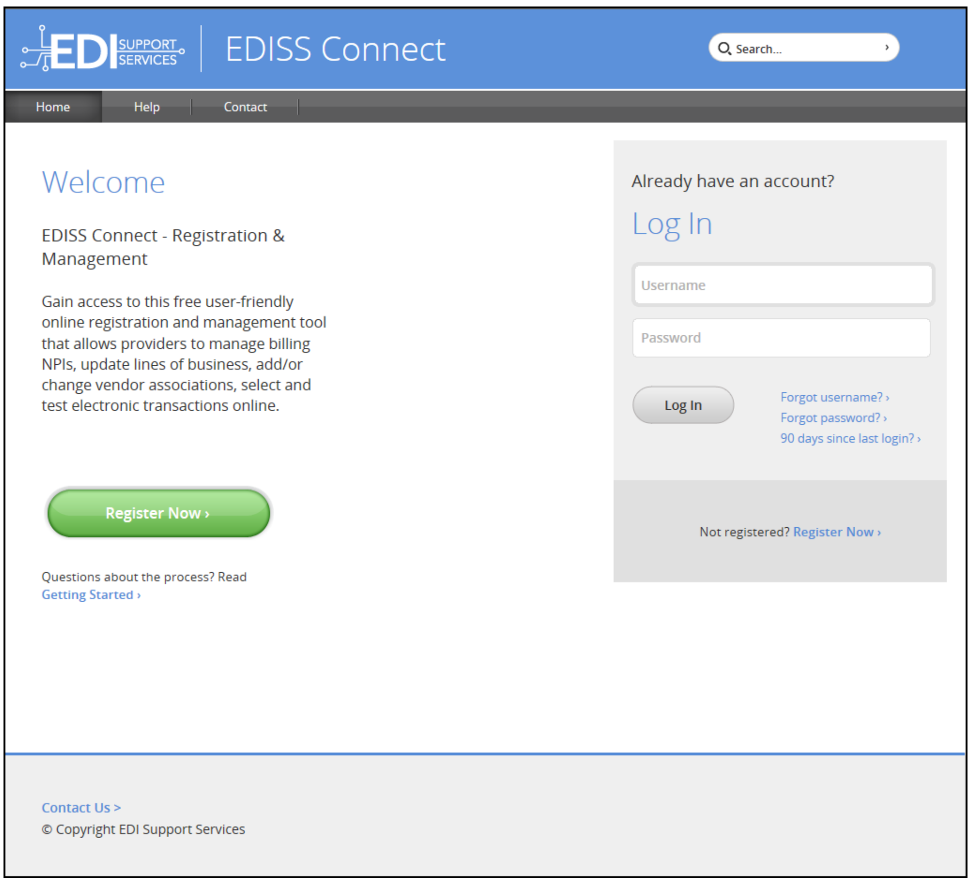
EDISS Connect User Manual for Vendors

Self-Registration

Information made accessible through EDISS Connect is available to users once the registration process is complete. User registration for EDISS Connect will need to be completed online.

Note: *On each page within EDISS Connect, there are FAQs in the right column to aid in answering questions related to the online registration process.*

1. Click **Register Now** to create an online account for accessing online profile information and adding and managing transactions.



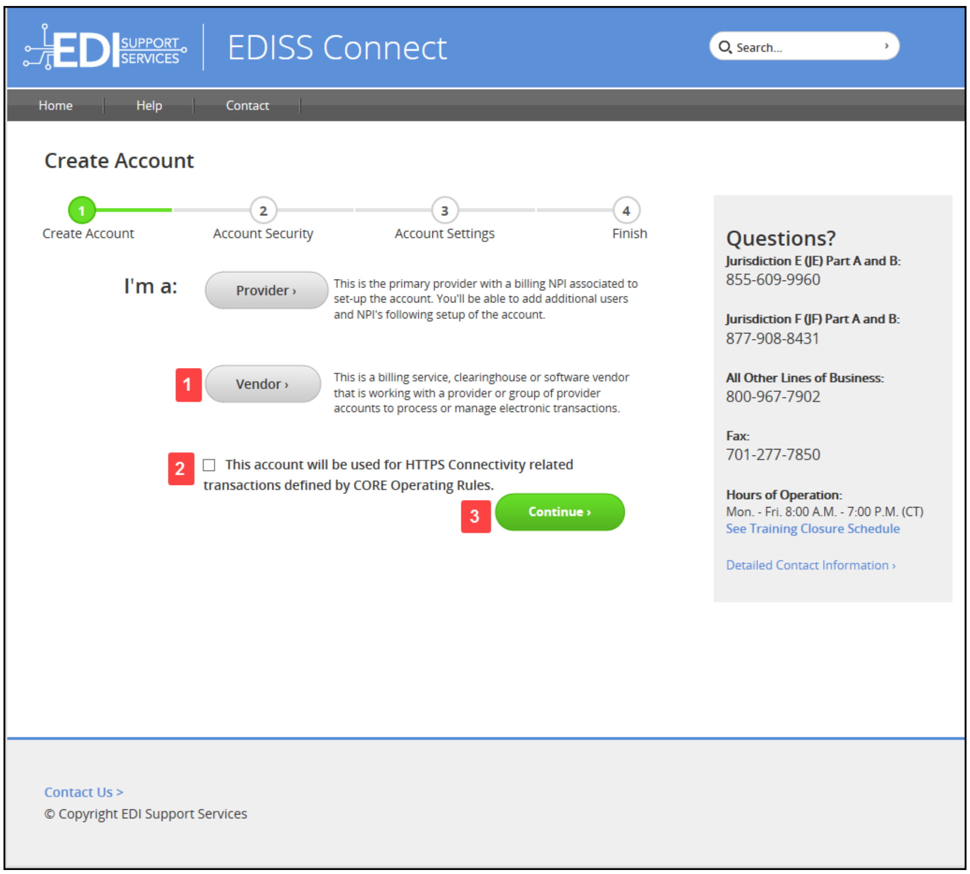
Create Account

1. First select **Vendor**. At any time in the process, you can use the back button to return to a previous step. The numbered progress bar on top of each page will help keep track of where you are in the process.

Note: *Vendors cannot register a provider on their behalf. If the account will be administered by a vendor, it is a provider's responsibility to first establish the account by registering.*

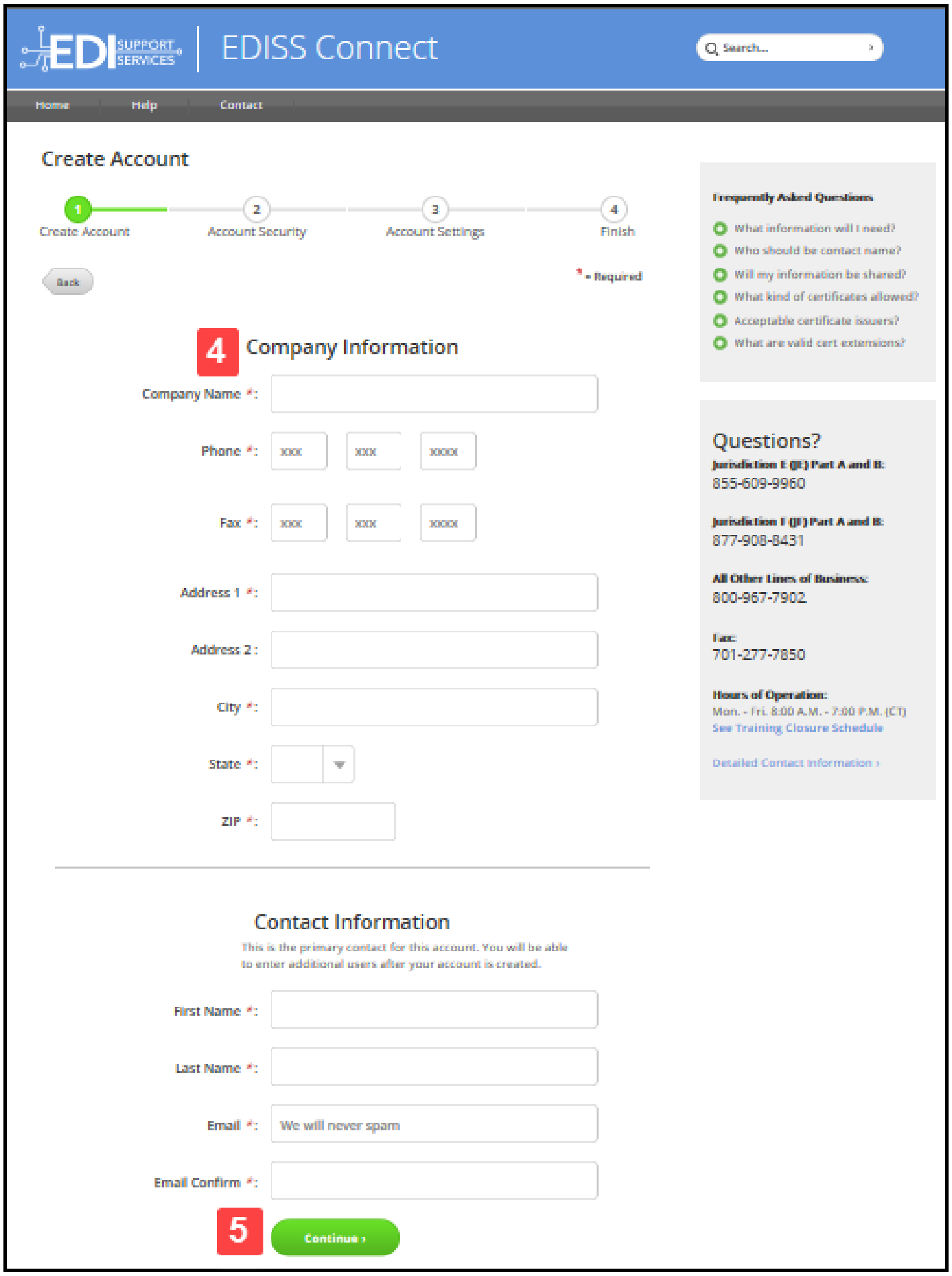
2. The HTTPS Connectivity option should only be selected by Trading Partners planning to use SOAP or MIME protocols to submit transactions to EDISS. Trading Partners should consult with their EDI application vendors to see if their solution supports HTTPS connectivity. Medicare Trading Partners are not allowed to use this option for electronic claims submission. Additional information may be found at: https://www.caqh.org/core/operating-rules.

3. Click **Continue**.



4. Enter your company information. All information on this page is required. The personal contact information on the bottom portion of this form is the primary contact for this account. You will be able to add additional users to access the account upon successful account creation.

5. Click **Continue**.



Account Security

1. Choose a username for your account. The username must be unique, between 8-20 characters and contain no spaces or special characters.

2. Choose a password for your account. Your password must be 8-16 characters consisting of at least one upper-case letter, at least one lower-case letter, one numeric value and one of these special characters: $, #, *, - or _ and contain no spaces. Do not use '&' or '+'. Then confirm your password.

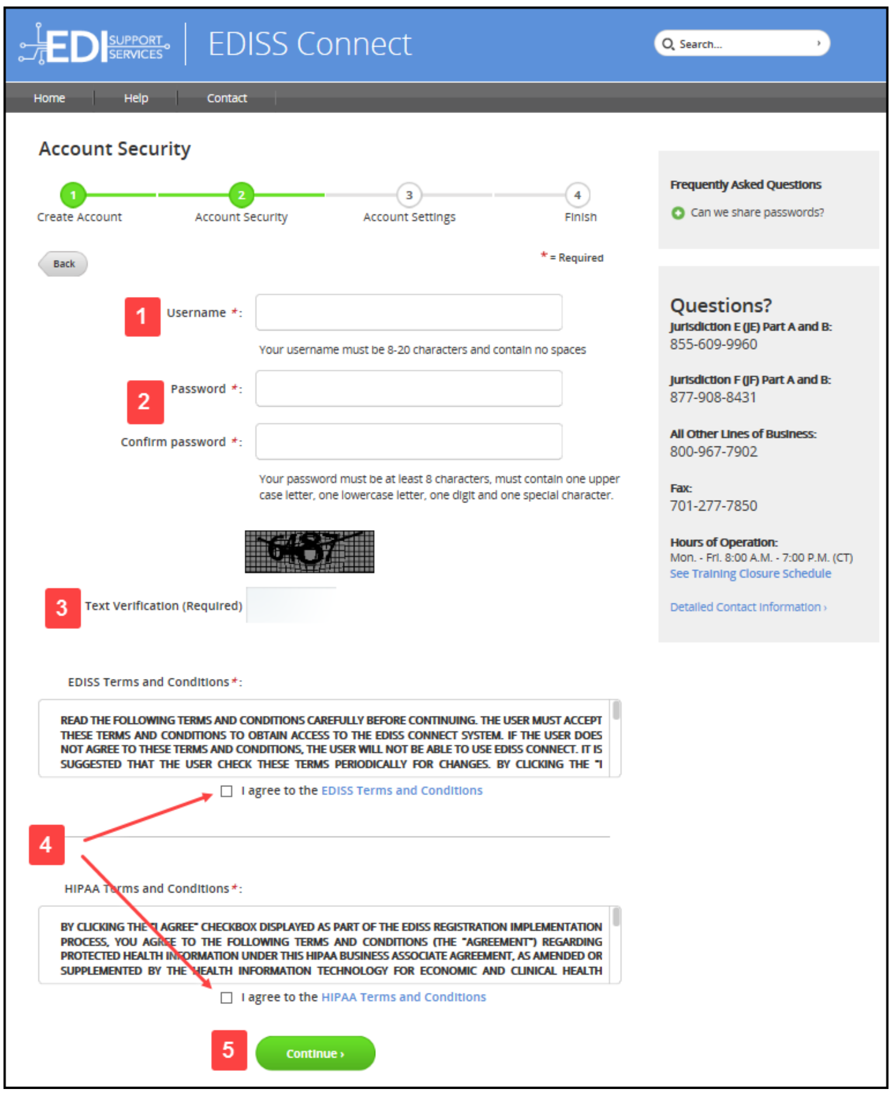
3. Complete the Text Verification by entering the characters from the image.

4. Additionally, you will need to agree to EDISS Terms and Conditions as well as HIPAA Terms and Conditions before you will be allowed to continue with your registration.

5. Click **Continue.**

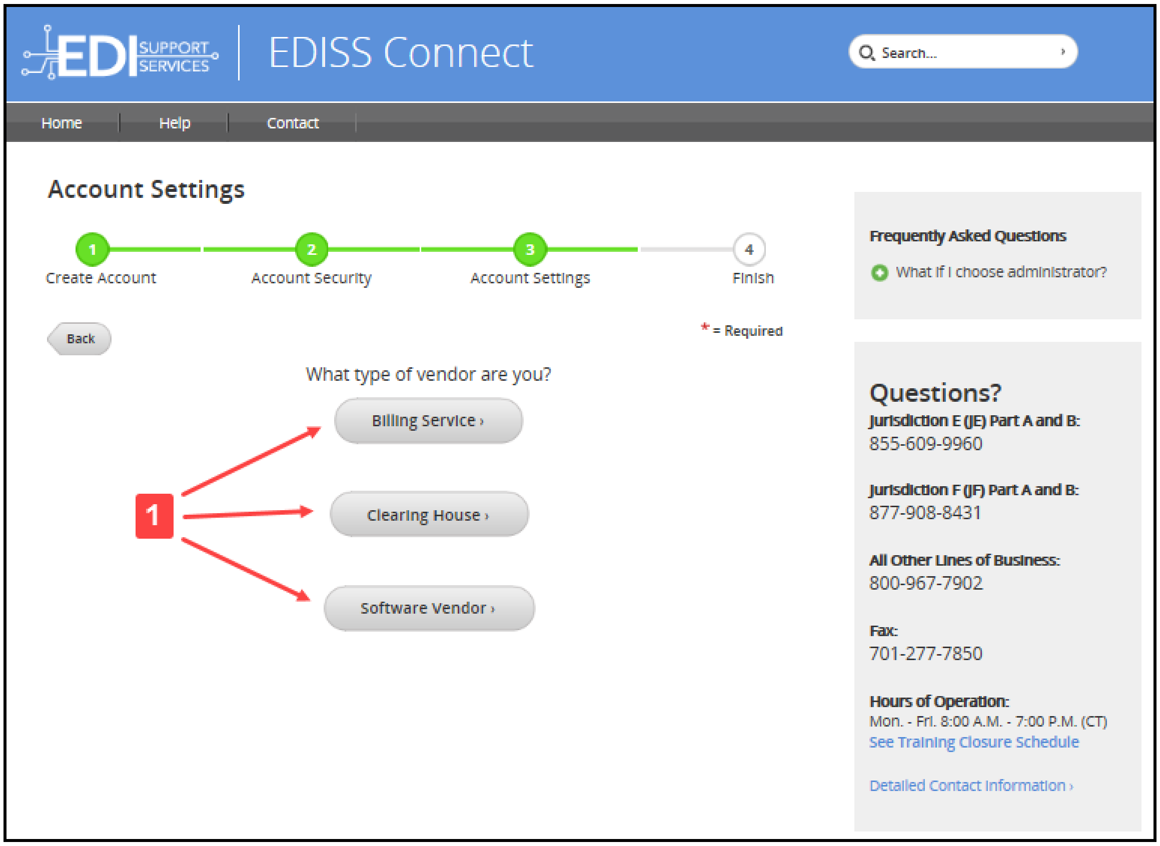
Note: *Connect username accounts that do not stay active will be de-activated or removed.*

- *Users are de-activated after 60 days of inactivity*
- *Users are removed after 90 days of inactivity*



Account Settings – Type of Vendor

1. For Account Settings, you must choose what type of vendor you are. A Billing Service or Clearinghouse processes or administers transactions on a provider's behalf. If you choose **Billing Service or Clearinghouse**, you will continue on with additional steps of registration. If you choose **Software Vendor**, you will be asked the name of your software and your registration will be complete.



Account Settings – Administration

1. You will need to answer *if you will be the administrator on behalf of one or more providers*. Administrating vendors assume the responsibility to manage all account information on a provider's behalf. This may include demographic, transaction and user-related information.

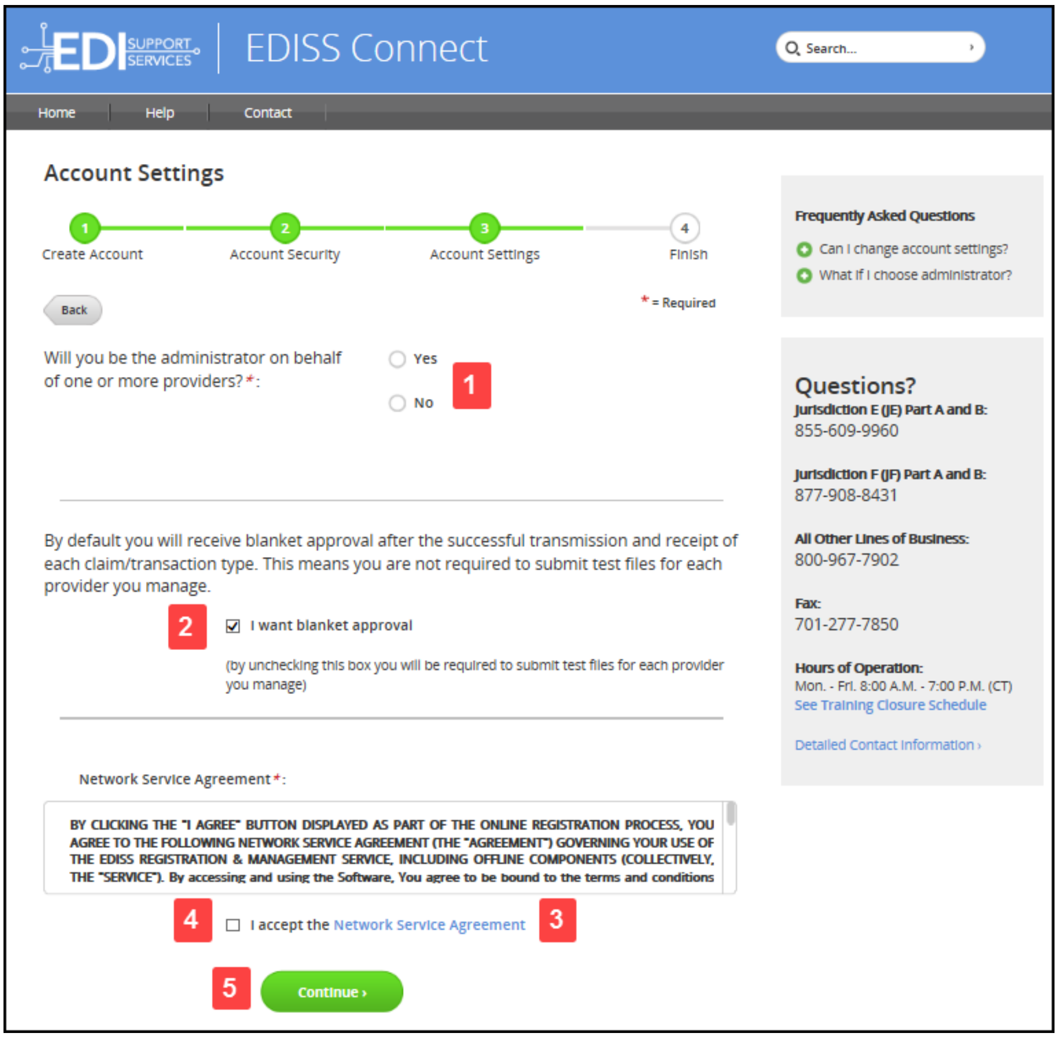
2. The ***I want blanket approval*** option is already checked by default. EDISS has specific blanket approval requirements that can be found at http://www.edissweb.com/docs/shared/blanket_approval_criteria.pdf. Once you achieve blanket approval, submission of test files can be bypassed.

Note: *If this box is un-checked, you will be required to submit test file(s) prior to production status being granted.*

3. To view the Network Service Agreement, click the **Network Service Agreement** link.

4. To accept the Network Service Agreement, check the **I accept the Network Service Agreement** box.

5. Click **Continue**.

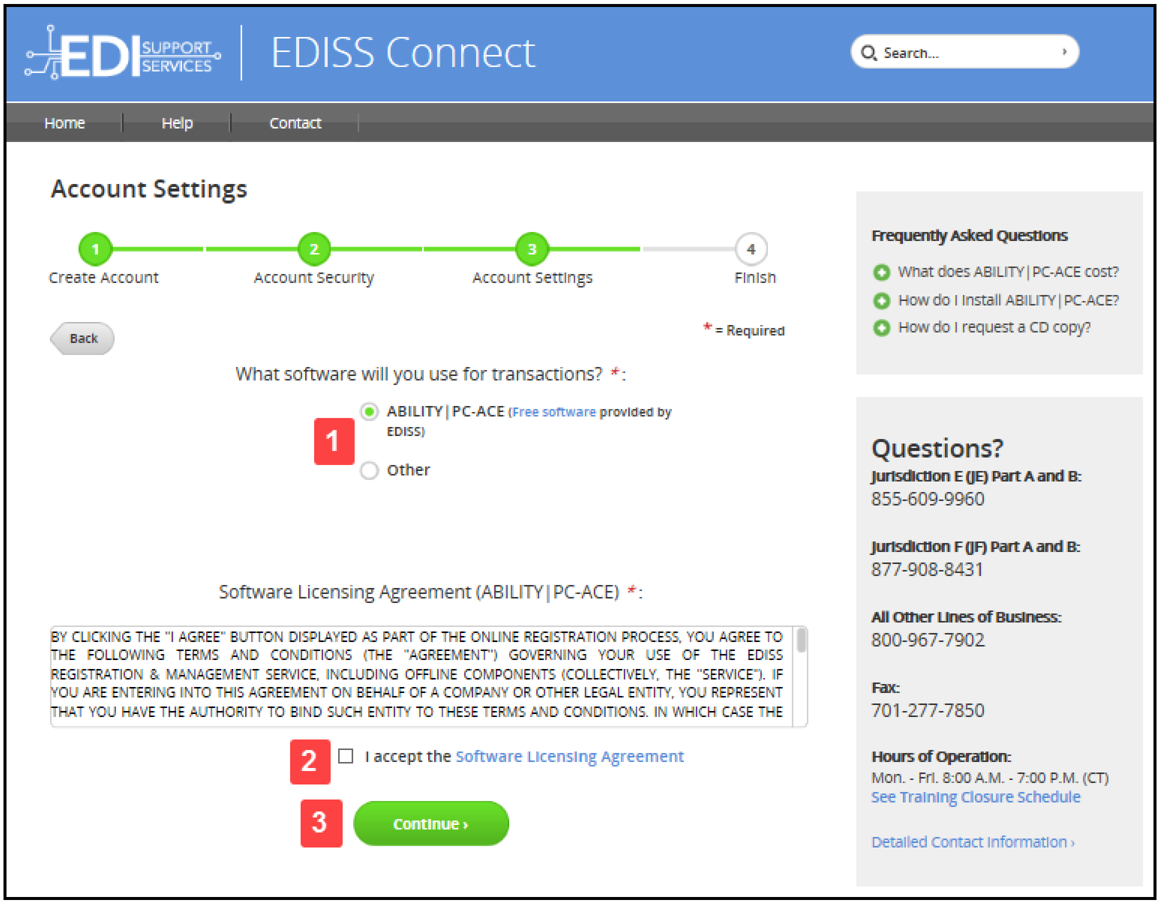


Account Settings - Software

1. You are required to choose what software you will use to process transactions.

2. If you use ABILITY|PC-ACE, the free software supported by EDISS, you will need to accept the associated software licensing agreement.

3. Once complete, click **Continue**.



Finish

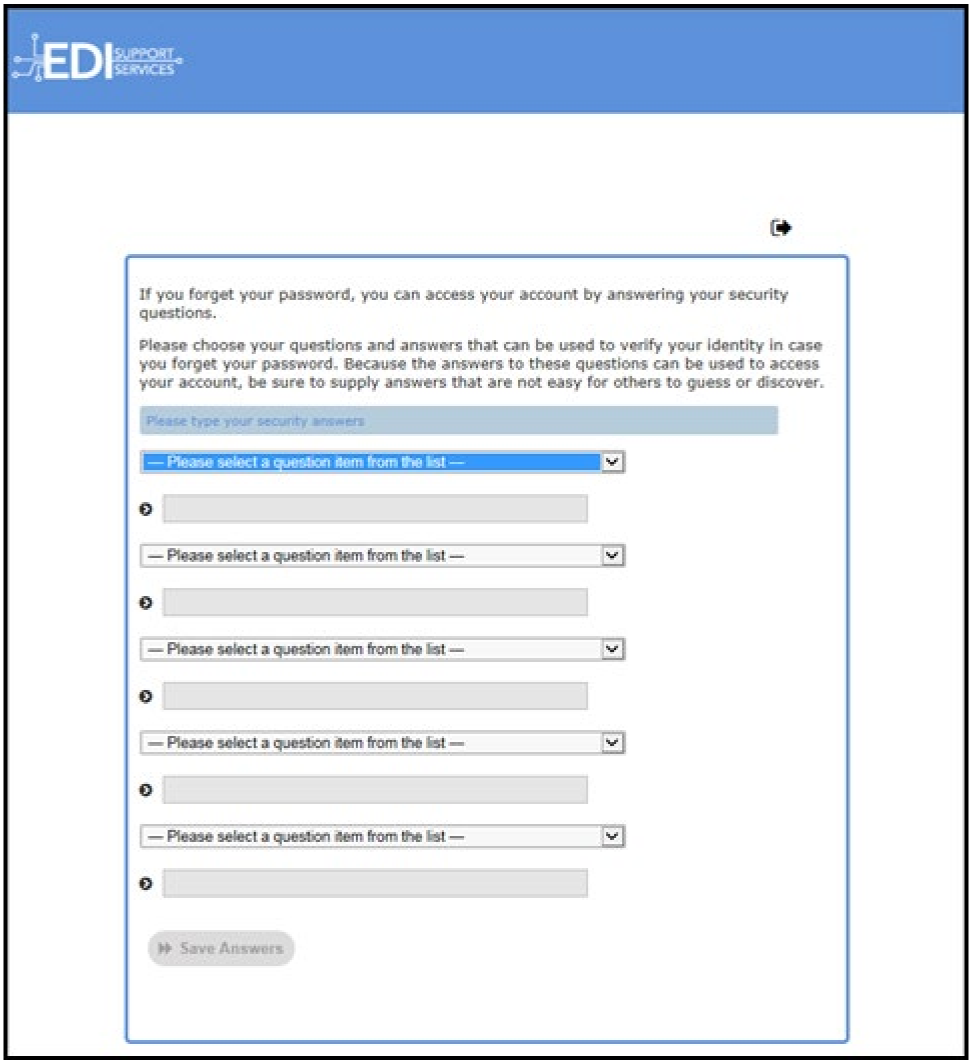
Your EDISS Connect account has been created, but you will need to click **Log In to my Profile** to finish the registration process by completing the security questions and adding transactions.

Answer Security Questions

To complete the user registration, five security questions must be selected and answered.

1. Select the questions and provide the answers. Answers must follow the below guidelines:
   - For security purposes, sessions are timed and all questions must be completed within three minutes.
   - Security questions are not case sensitive.
   - Each security question can be used only once.
   - The same answer cannot be used for multiple security questions.
   - Answers to security questions must be at least four characters long.
   - When answering security questions, you cannot use any of the words in the security question within your answer. (Example: Q: What city/town were you born in?, A: Panama City)

2. Once all five security questions have been answered, click **Save Answers**.

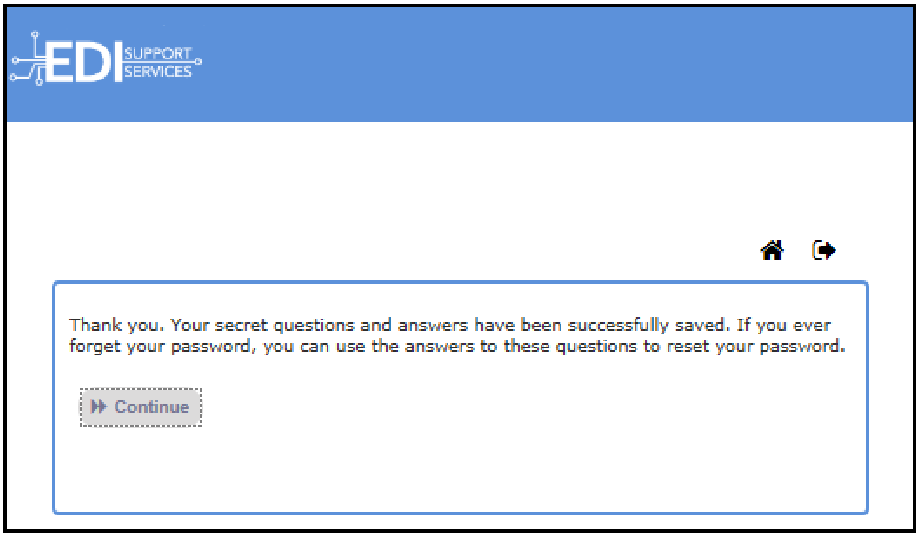


3. After clicking **Save Answers**, you will be taken to a screen where all five security questions, along with answers, are displayed. EDISS strongly recommends that you print this page for future reference and distribute to any staff who will be accessing the account.

Note: *When viewing security questions and answers, if there are any corrections that need to be made, click* ***Go Back*** *to access the previous screen and modify answers or questions.*

4. Click **Confirm Security Answers**.

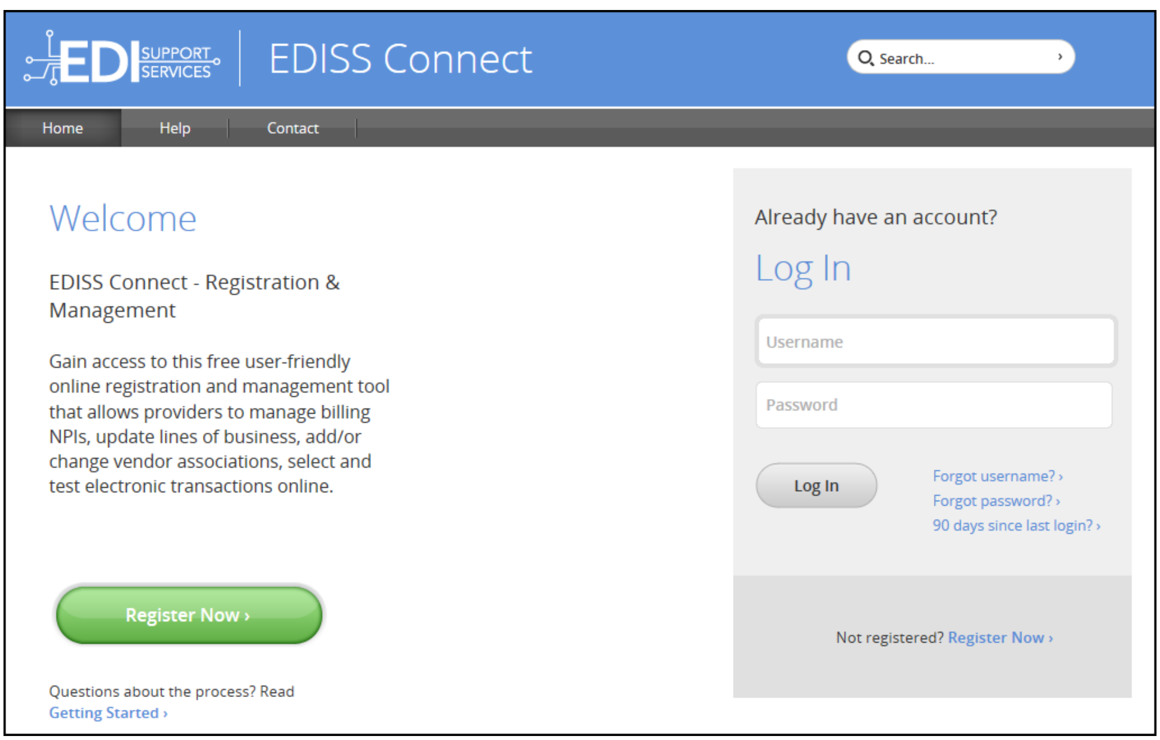
5. Click **Continue** and you will be directed to your Vendor Dashboard.



Vendor Dashboard and Transaction Catalog

Once you have successfully registered for EDISS Connect, you will be able to log into your account and manage your profile, begin managing users, set up transactions available in your catalog and test claim files.

To log in, go to https://connect.edissweb.com, enter your username and password and click **Log In**.



Vendor Dashboard

1. Upon successful log in, you will see your **Account Home** or dashboard.

2. The **Manage Providers** table shows a snapshot of providers linked to the vendor with outstanding tasks. You will also be able to see your role for the provider and the status.

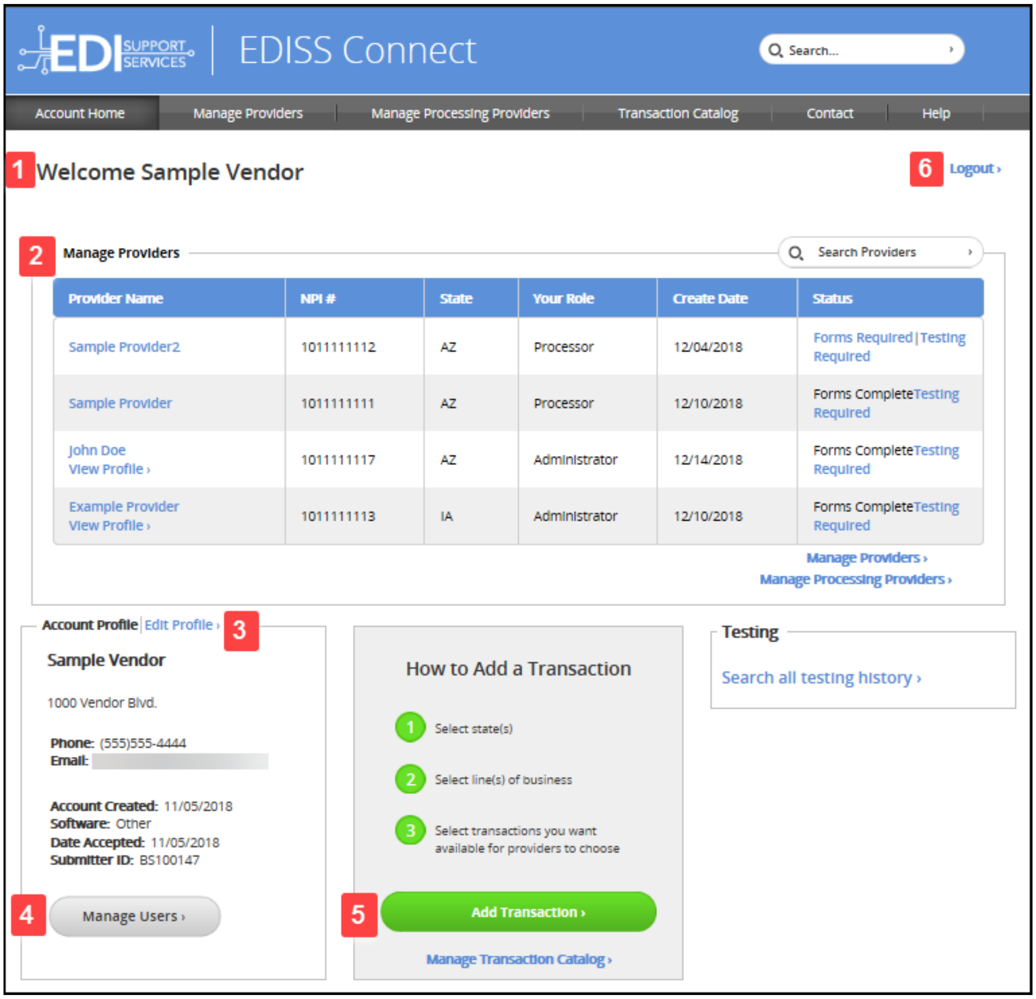
3. To edit your demographic and security information, click **Edit Profile** to be taken to your account details.

4. At any point you can add, edit or remove users that have access to your account by clicking **Manage Users**.

5. Transactions may be added by clicking **Add Transaction**.

6. To logout of EDISS Connect, click the **Logout** link on any page.

Note: *The above sections of the Vendor Dashboard are also discussed further on in the User Guide.*



Transaction Catalog

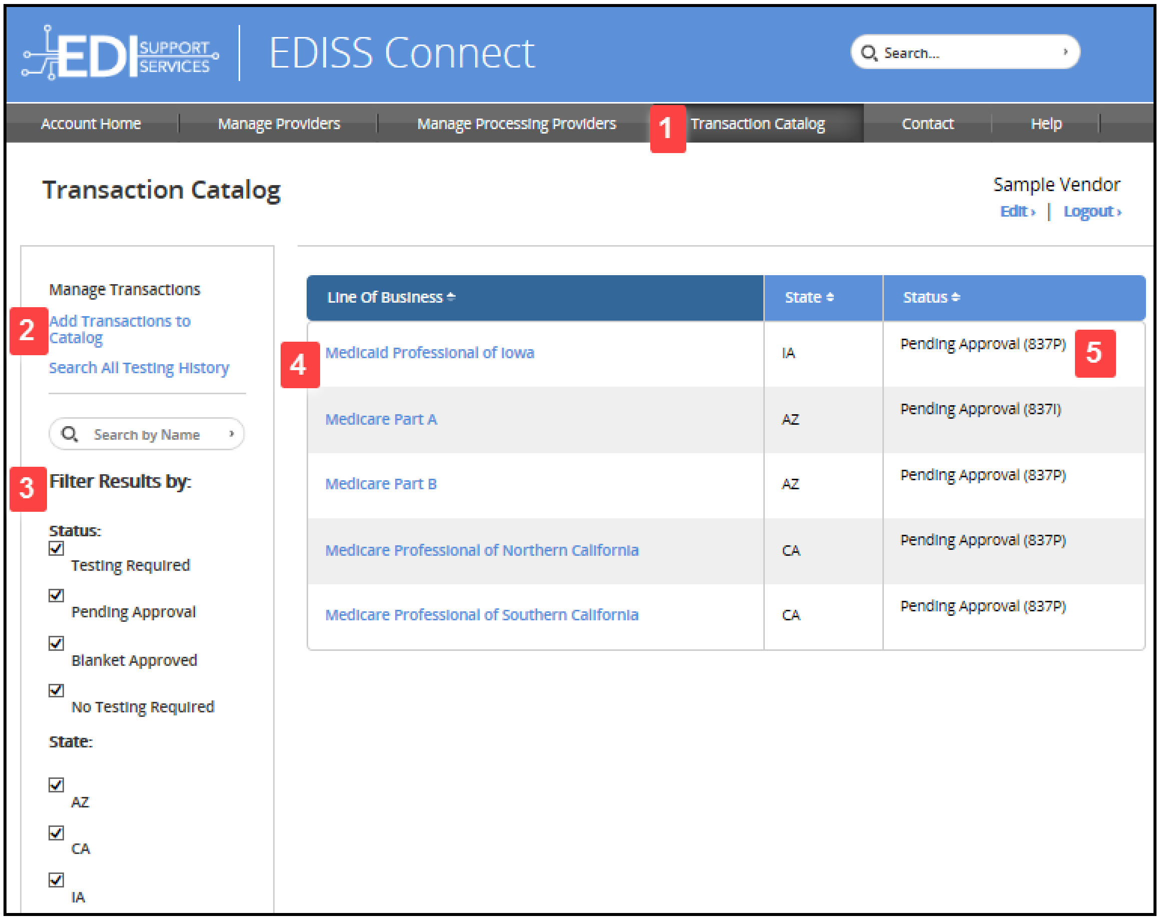
1. The Transaction Catalog is a listing of all transactions associated with your vendor account. To process any electronic transaction for a provider, you must register for that specific state, line of business and transaction combination.

2. You can add transactions to the catalog at any time by registering them in a simple step-by-step process.

3. The transactions shown to the right can be filtered by status or state by clicking on the arrow next to the header title.

4. To view the transactions tied to the lines of business, click on the links in this table.

5. The status of each Line of Business is listed to notify you if testing is required.



Register Transaction – Select State(s)

Once you register a transaction, it will be available in your **Transaction Catalog** for providers to select.

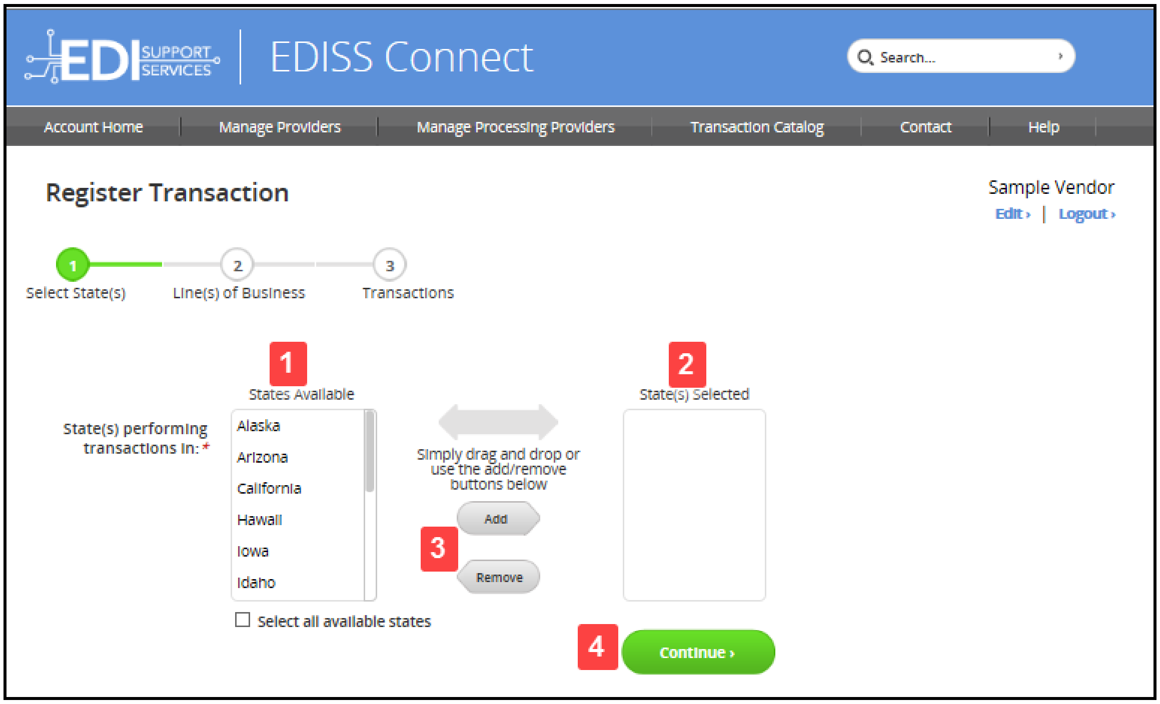
1. The left column will show all states that EDISS conducts business with. To select your state(s) that you will be doing business with, highlight the state and click **Add**.

2. The states you have selected will show up in the right column.

3. The **Remove** button can be used to move a state from the right column back to the left if selected in error.

Note: *The states can also be dragged from one column to the other.*

4. Once all applicable states have been selected, click **Continue**.

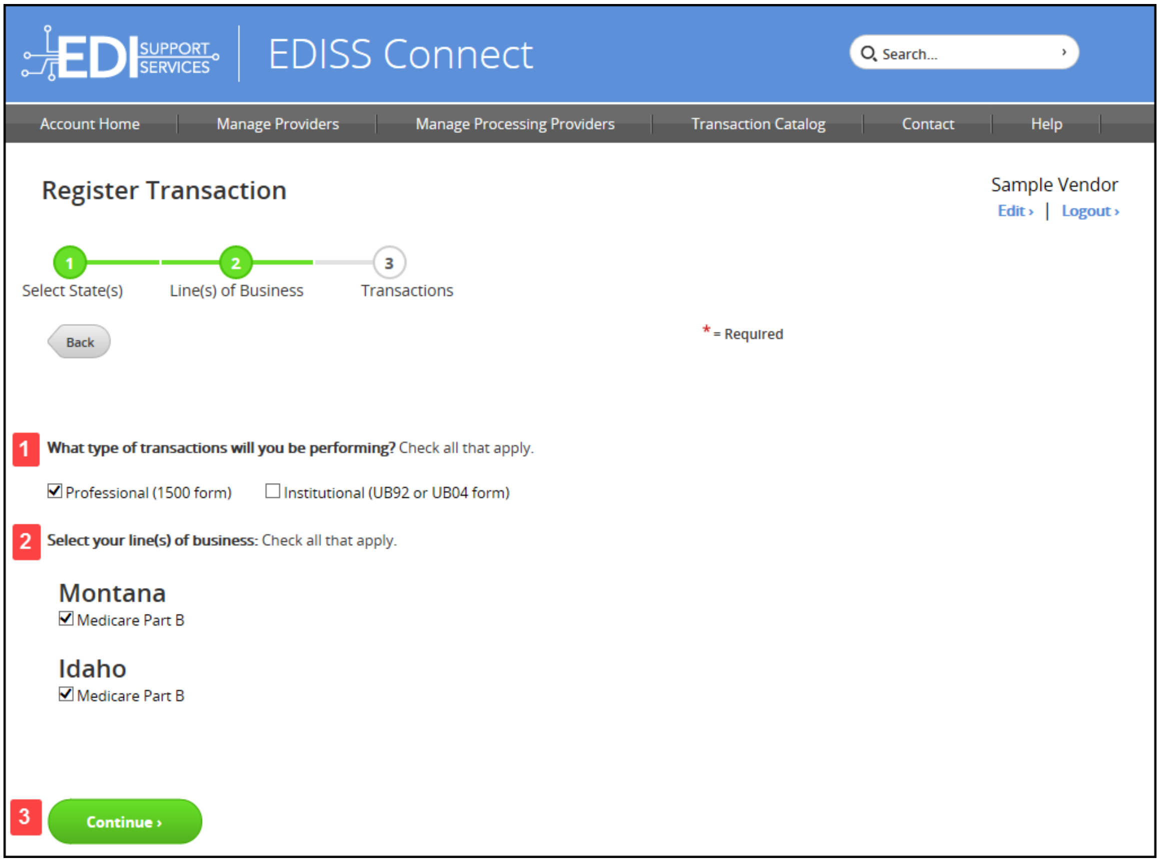


Register Transaction – Line(s) of Business

1. Check what types of transactions you will be performing.

2. Check all applicable lines of business. The lines of business will display based on the type of transactions you indicated in the previous question. The states will display from the previous step.

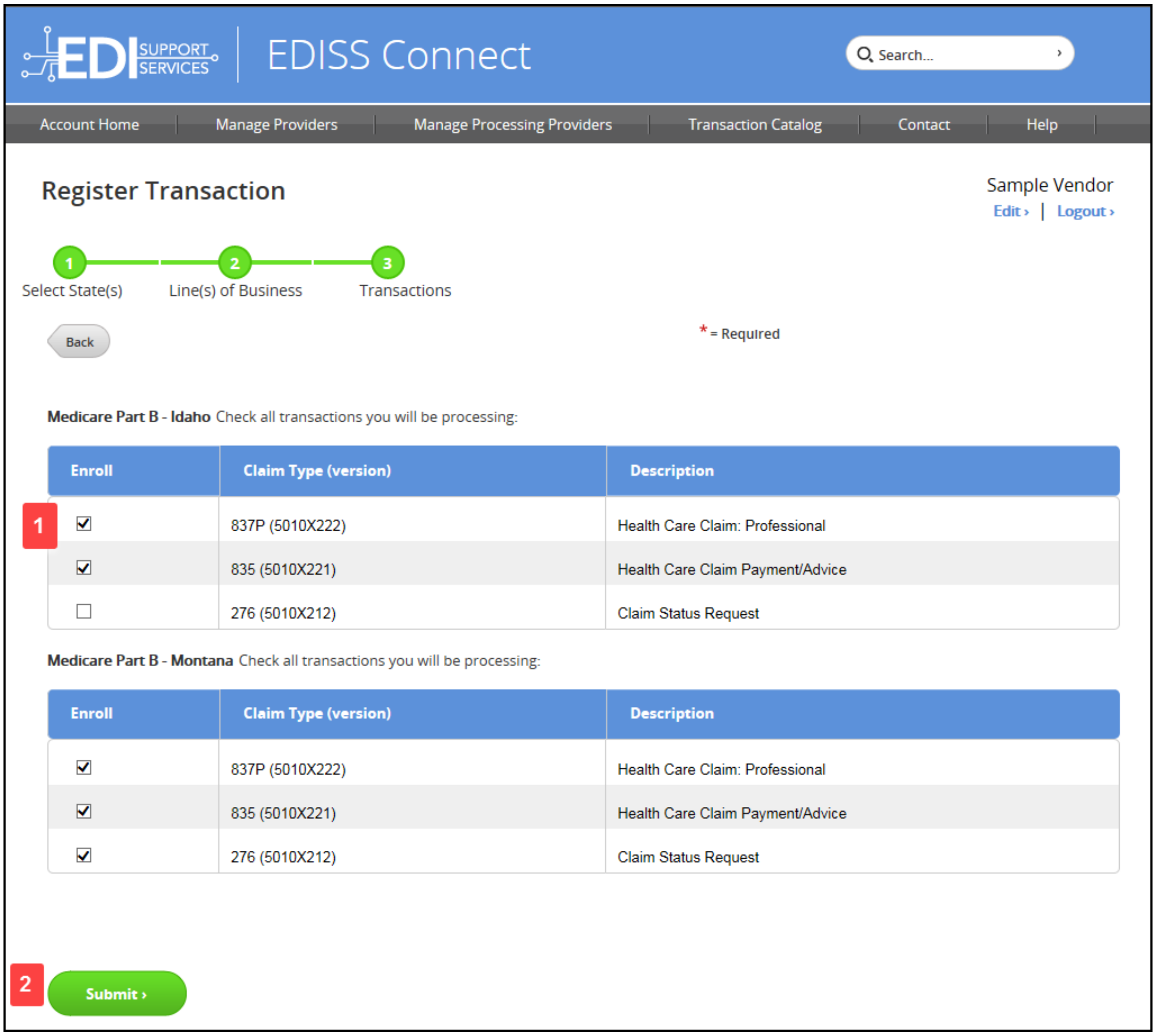
3. Click **Continue** when all applicable lines of business have been selected.



Register Transaction – Add Transactions

1. Click on the small box under **Enroll** to add a checkmark to the specific transaction type that will be registered with EDISS.

2. Once applicable transactions are added, click **Submit** to finish registering the transaction(s).

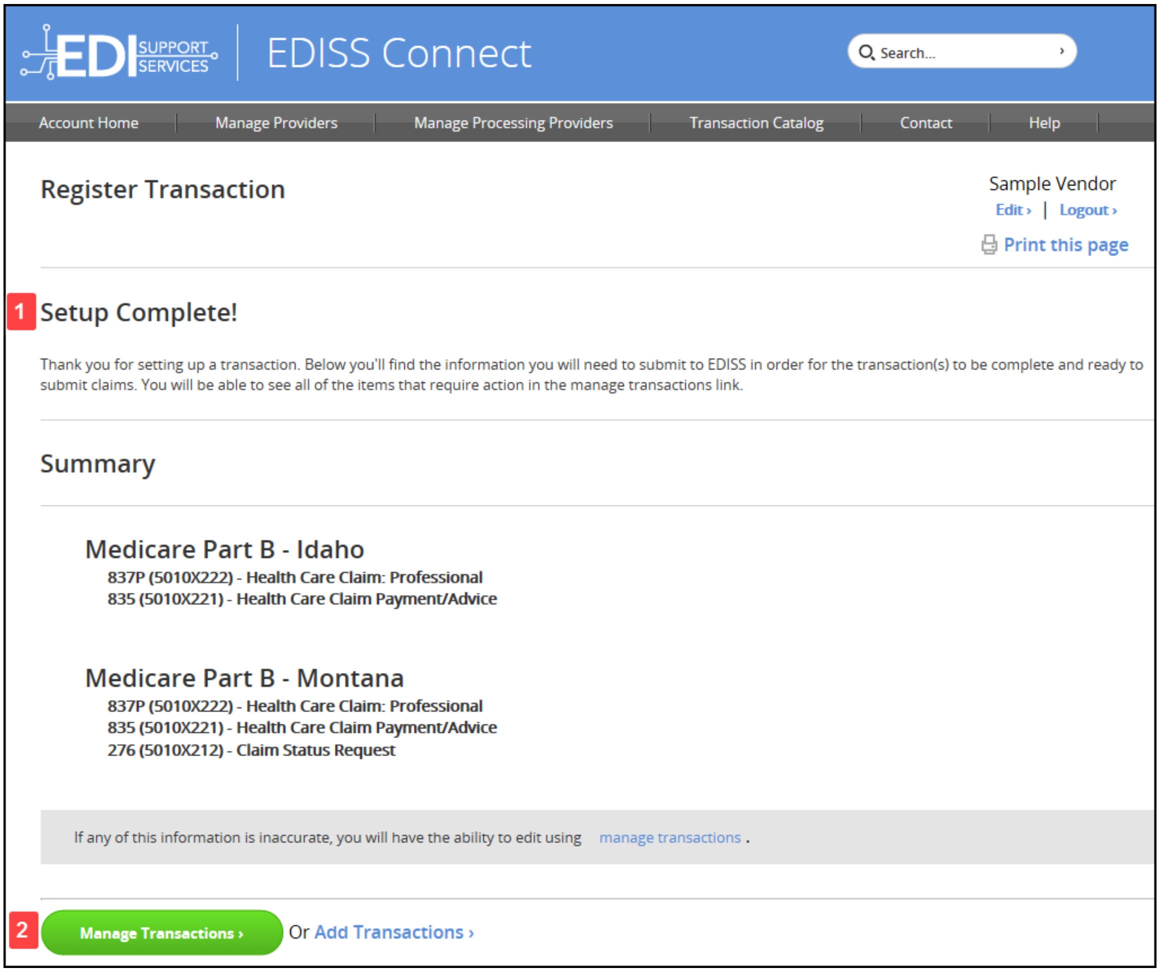


Register Transaction – Setup Complete

1. The transactions will now appear in your Transaction Catalog. A summary of the transactions you've setup will display with the ability to print this page for your records.

Note: *Providers will not be able to select you as a processing vendor until transaction registration is complete.*

2. Once you are finished, you can go to **Manage Transactions** or **Add Transactions**.



Edit Profile

1. Under **Account Home**, by clicking **Security Settings,** you are able to change your password.

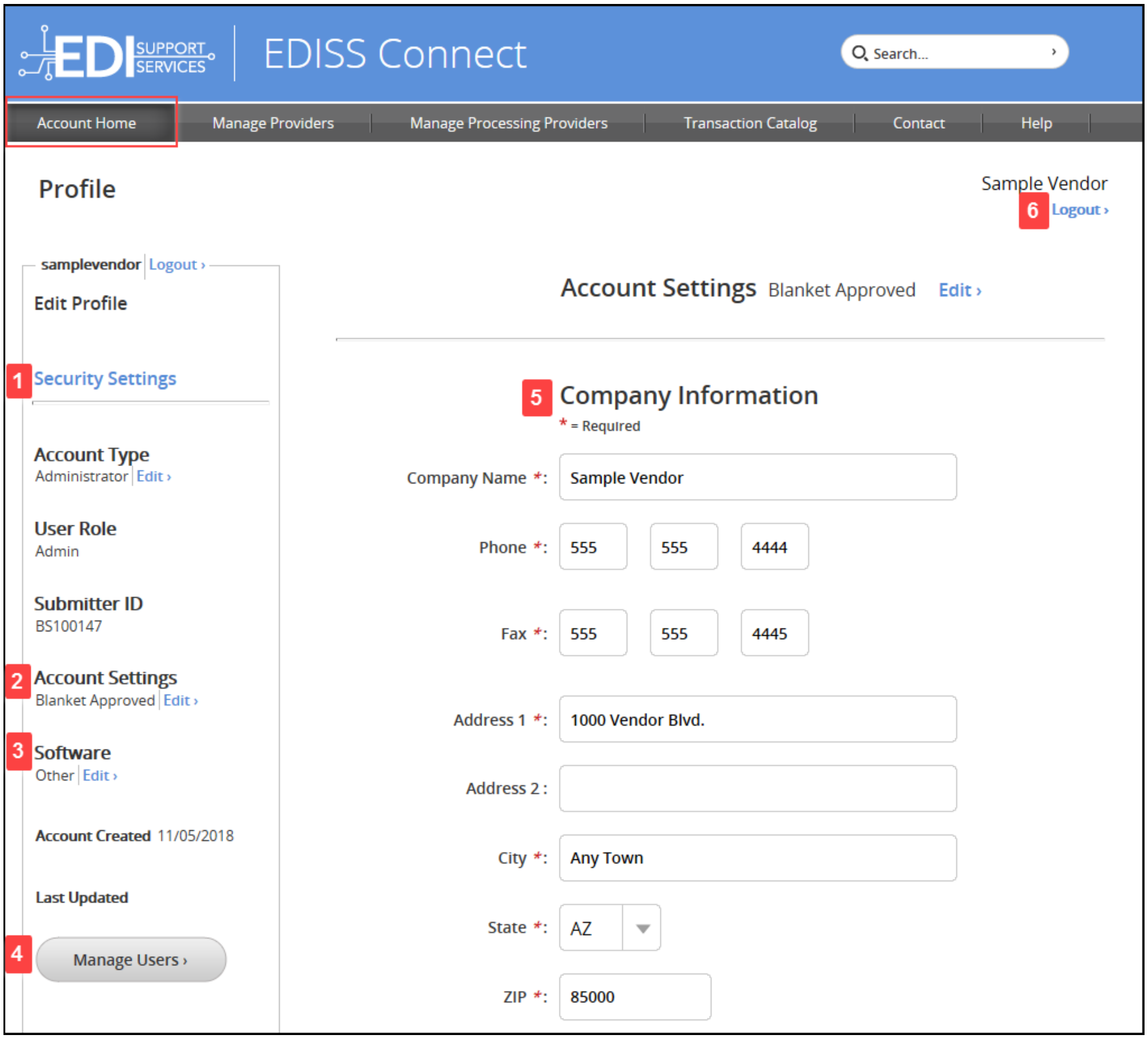
2. **Account Settings** can be set to either Blanket Approved (default) or Testing Required.

3. The **Software** section indicates if the software you have selected to use is ABILITY|PC-ACE or Other.

4. **Manage Users** allows you to manage the users that have access to the account, their email addresses and security settings.

5. At any time, you can update your company information and save it to your profile.

6. To logout of EDISS Connect, click the **Logout** link on any page.

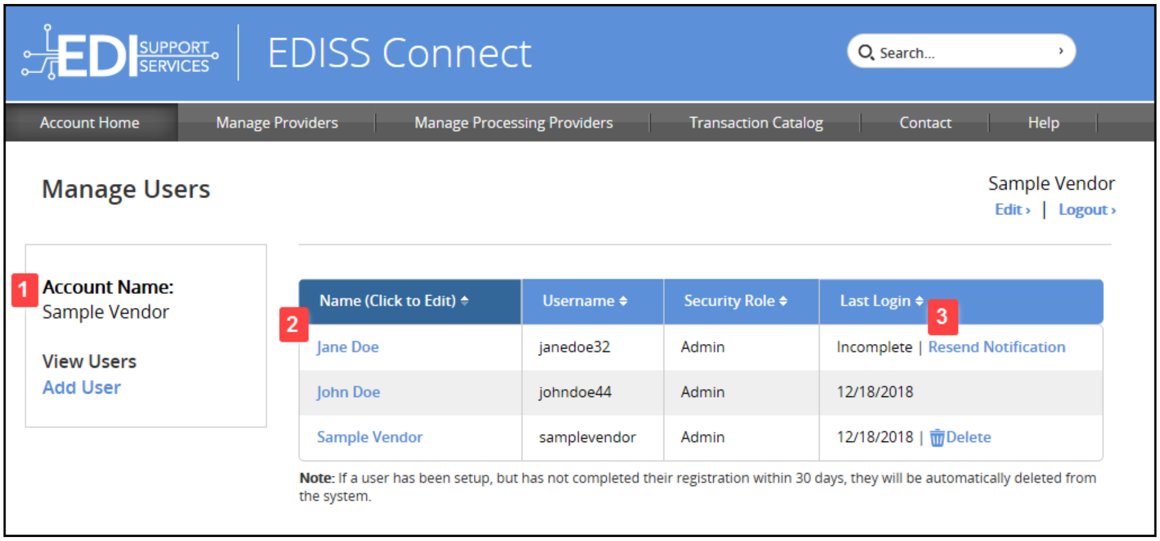


Manage Users

1. **Manage Users** displays the users associated with the account.

2. The account name is shown in the first column. To view details about a specific user, click the name in the list.

3. The **Last Login** column shows the date when that user last logged into the system. If the registration is incomplete, the status displays with the ability to resend a complete online registration notification. You can also delete a user from the system in this column.



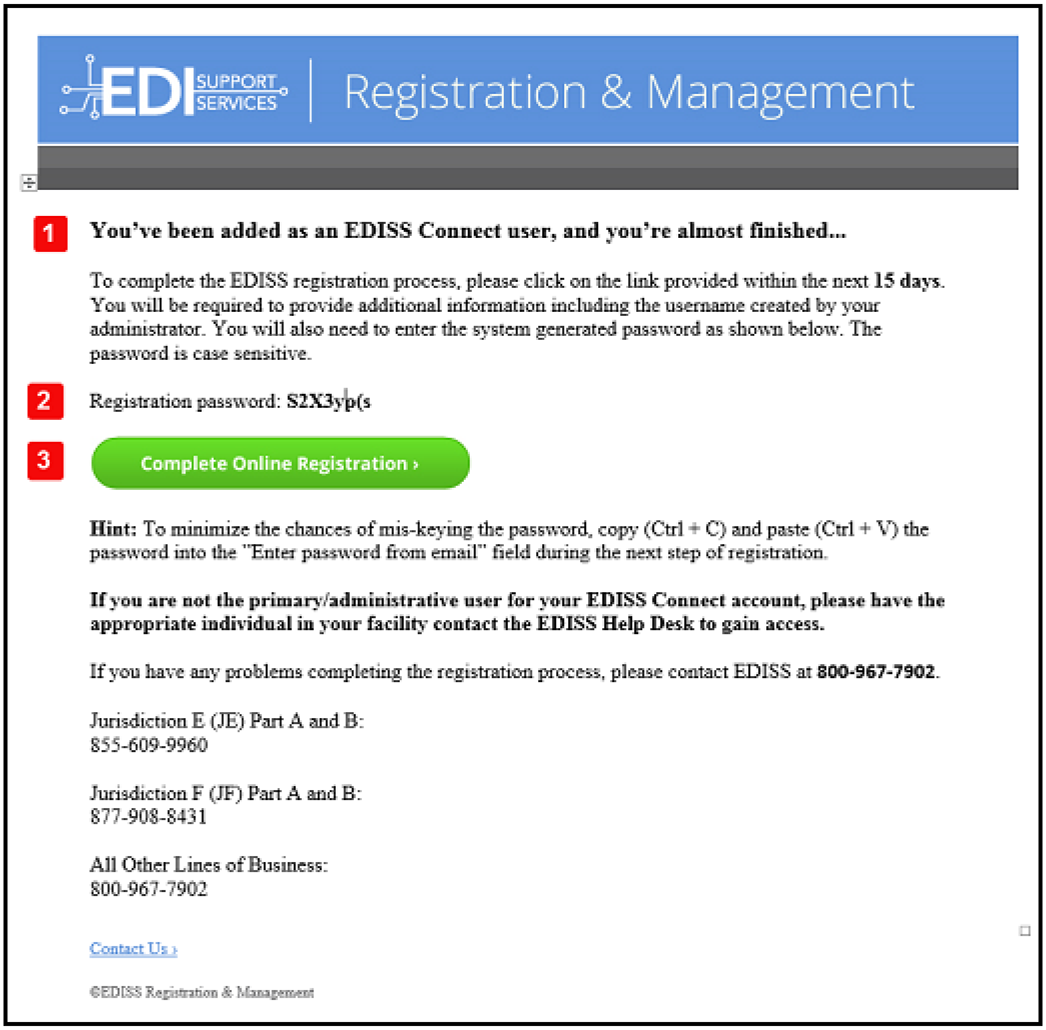
Manage Users – New Users

1. When a new user is setup in the system, the user will receive the email notification below.

2. A temporary registration password is generated and required to finish registering as a user.

3. The user must click **Complete Online Registration** within the email to finish their registration.

Note: *If you are unable to view the Complete Online Registration image within the email, it will be located directly under the temporary password, or you may also use the* ***Show Image*** *option in the email.*



EDI SUPPORT SERVICES | Registration & Management

1 **You've been added as an EDISS Connect user, and you're almost finished...**

To complete the EDISS registration process, please click on the link provided within the next **15 days**. You will be required to provide additional information including the username created by your administrator. You will also need to enter the system generated password as shown below. The password is case sensitive.

2 Registration password: **S2X3yp(s**

3 Complete Online Registration ›

Hint: To minimize the chances of mis-keying the password, copy (Ctrl + C) and paste (Ctrl + V) the password into the "Enter password from email" field during the next step of registration.

If you are not the primary/administrative user for your EDISS Connect account, please have the appropriate individual in your facility contact the EDISS Help Desk to gain access.

If you have any problems completing the registration process, please contact EDISS at **800-967-7902**.

Jurisdiction E (JE) Part A and B:
855-609-9960

Jurisdiction F (JF) Part A and B:
877-908-8431

All Other Lines of Business:
800-967-7902

Contact Us ›

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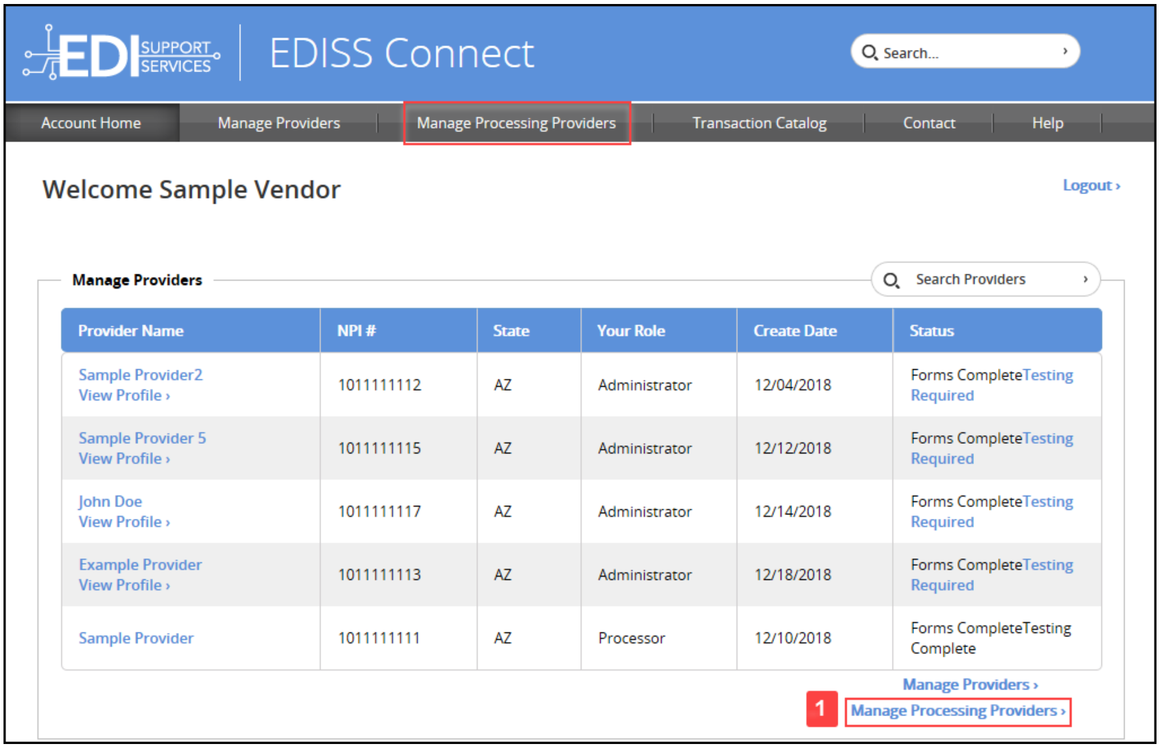
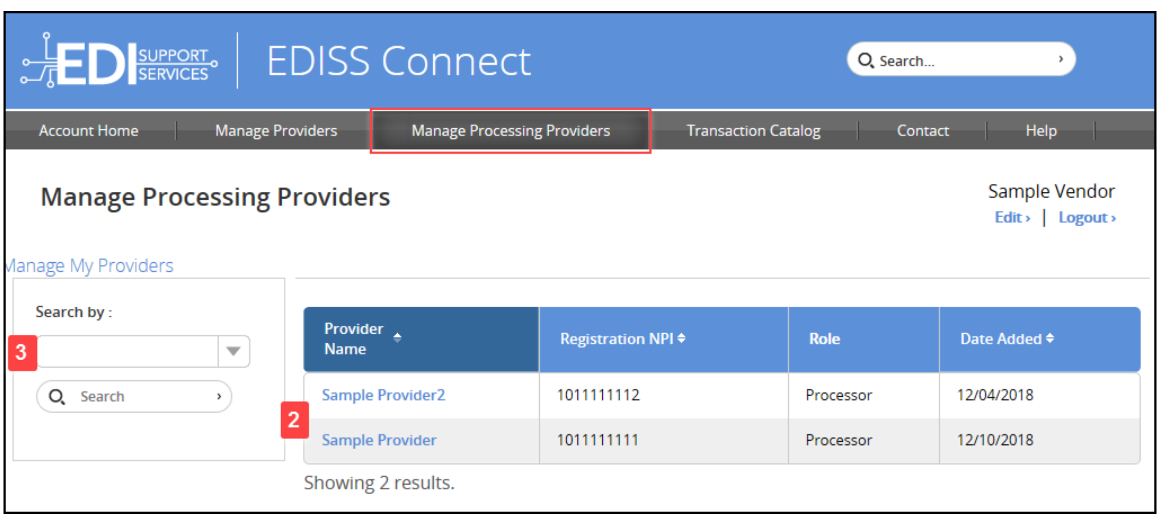
Manage Processing Providers

1. To view a list of providers that have selected you to process one or more electronic transactions, on the **Account Home** page, click **Manage Processing Providers** in the toolbar or the **Manage Processing Providers** link.



2. The provider's name will show in the list along with their NPI, role and date added. To view the transactions associated with the provider, click on the provider's name.

3. You can search for the provider's NPI or name that have selected you to process transactions.



Manage Processing Providers cont.

1. The detailed transactions page for a specific provider shows the provider's name, NPI, Submitter ID and Tax ID/SSN.

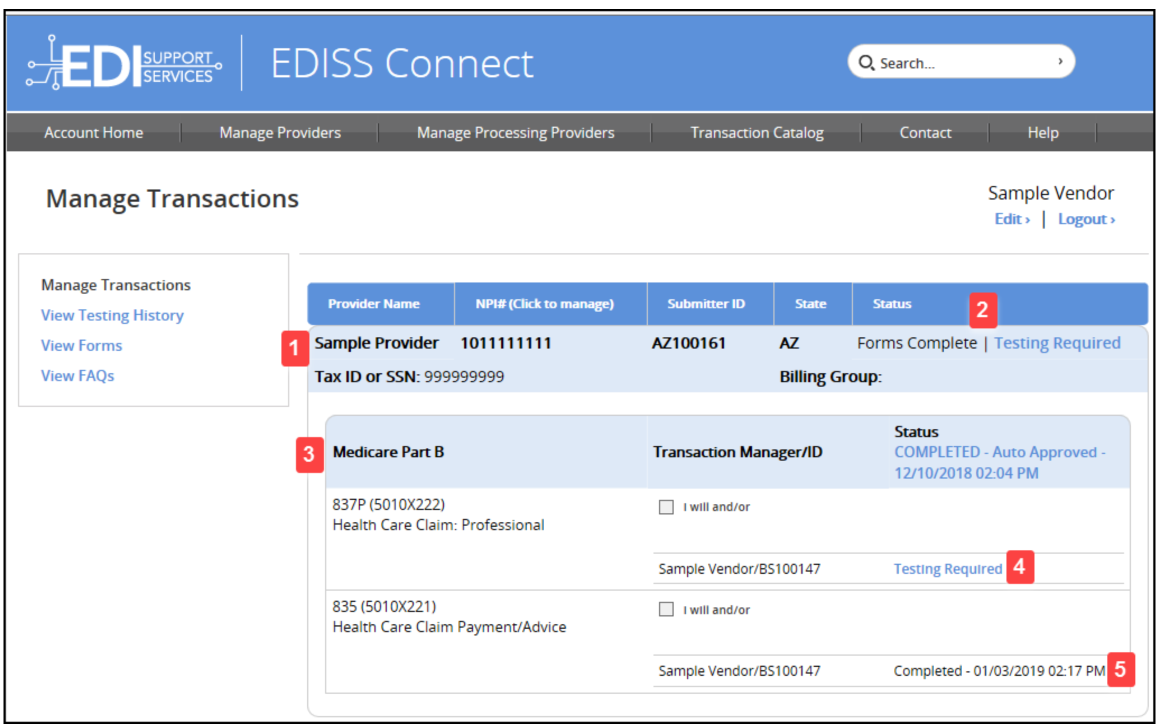
2. The **Status** shows forms required or testing required at a glance for the NPI. If **Forms Required** is displayed, the provider must accept the required form(s) by logging into their Connect profile.

3. The line of business and transaction types the provider selected you to perform are listed below. On the far right, once required forms are accepted and processed for this specific line of business, a date will appear as well as a statement indicating *COMPLETED - Auto Approved*.

4. If a Testing Required link is shown, you can click on the link to upload test files into the EIDSS Connect system. Once testing has been completed and approved, *Testing Completed – Approved* will be shown with a production date.

Note: *Only Non-Medicare lines of business can be tested through EDISS Connect. Medicare lines of business will need to be tested through the EDI Gateway System.*

5. For transactions not needing testing or when they have been moved into production, the production date and statement *Completed* will be displayed.



Managing Providers

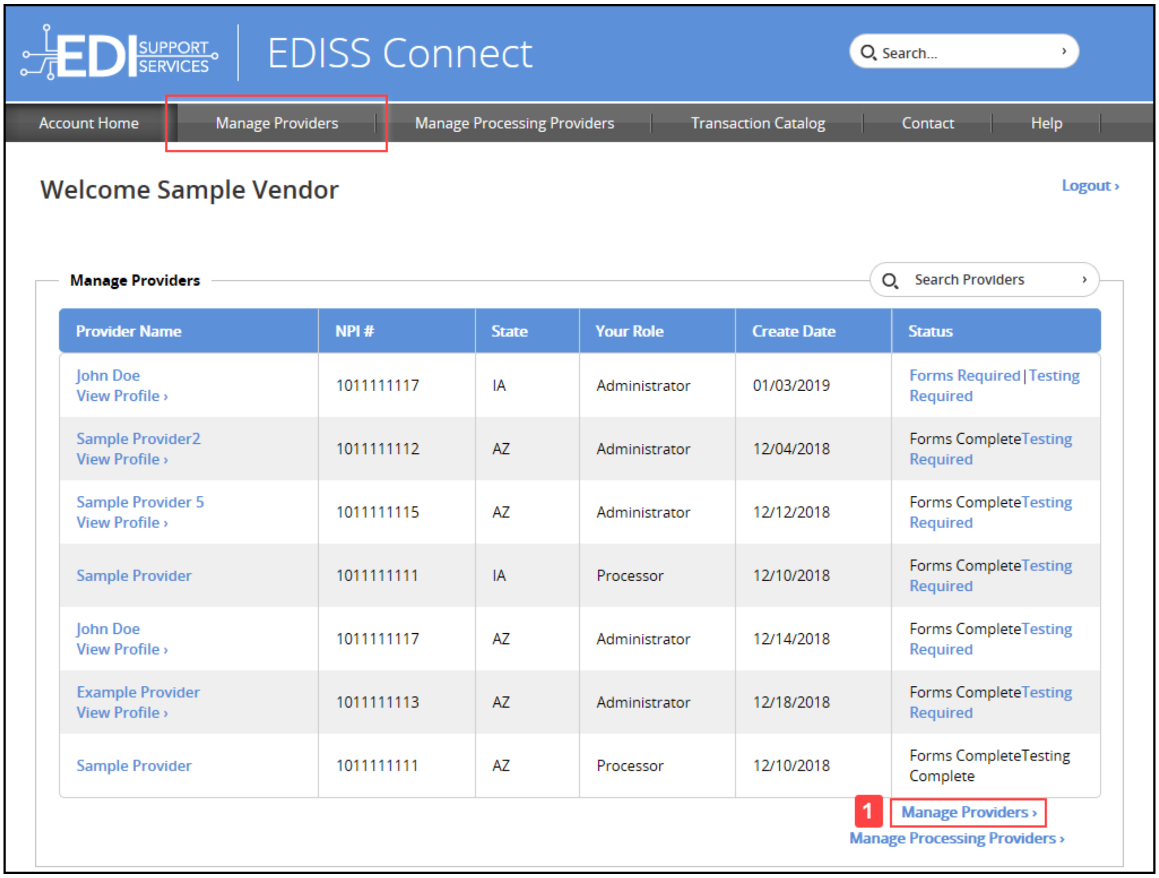
EDISS Connect allows you to manage processing providers that have selected you to perform specific transaction types. In addition, it allows a Vendor to administer a provider profile on their behalf. Vendors can choose this role during their registration process. Being an Administrating Vendor means that your facility assumes responsibility and control of a provider profile and are tasked with state, line of business and transaction registration, as well as any user or demographic information.

Note: *The provider must accept the required form(s) by logging into their Connect profile. As a Vendor Administrator, you* ***must*** *add the transactions, but they will not be moved into production until the provider has accepted the required form(s).*

Manage Providers - Accepting/Rejecting Administration of Provider's Profile

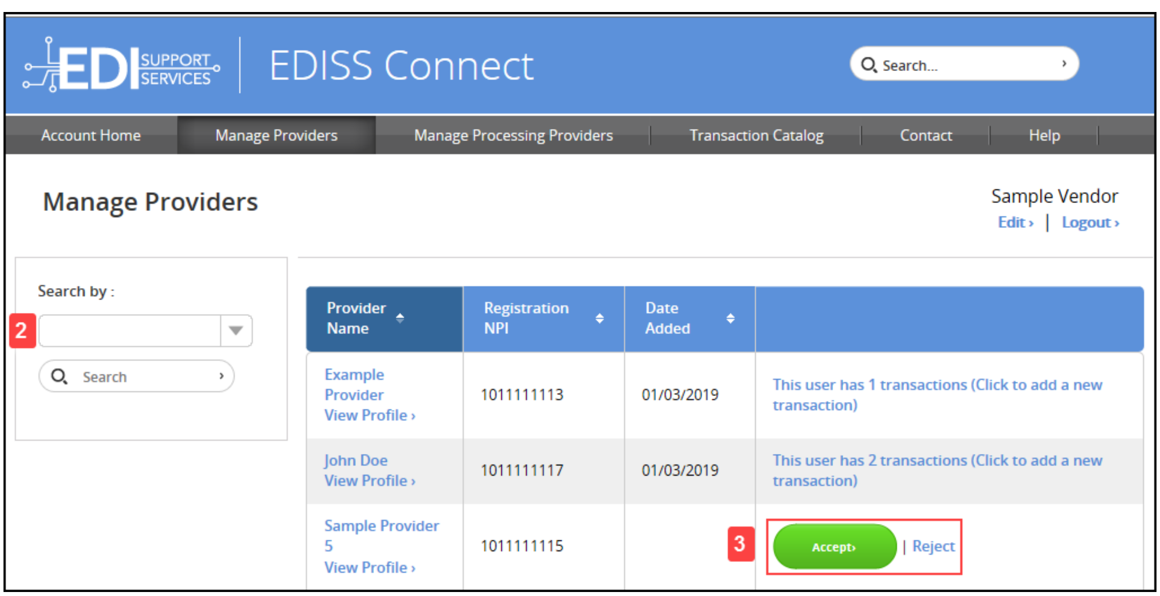
To accept or reject the managing of specific providers:

1. On the **Account Home** page, click **Manage Providers** in the toolbar or the **Manage Providers** link.



2. You may search by the provider's NPI or name.

3. Click **Accept** or **Reject**.

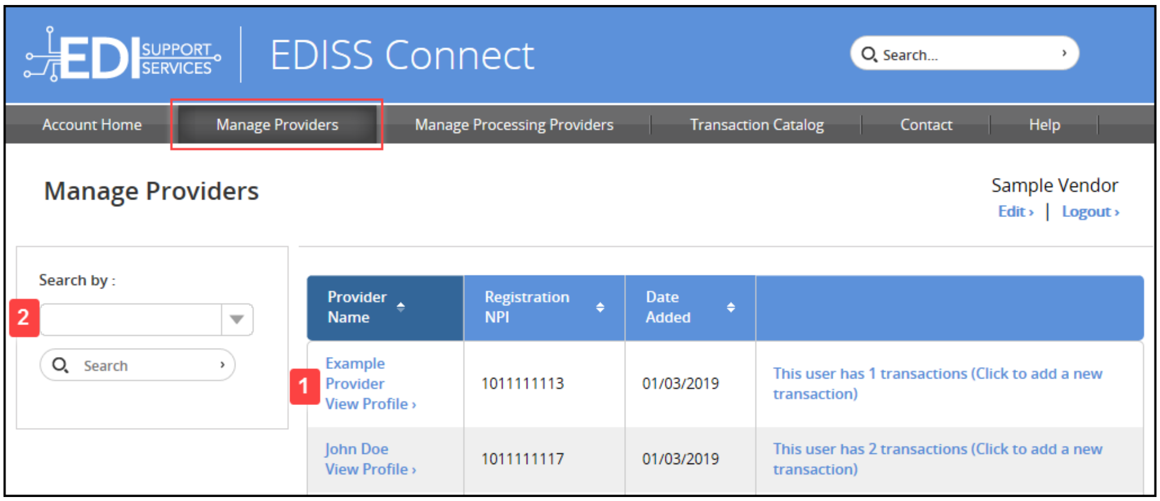


Manage Providers – Manage Transactions

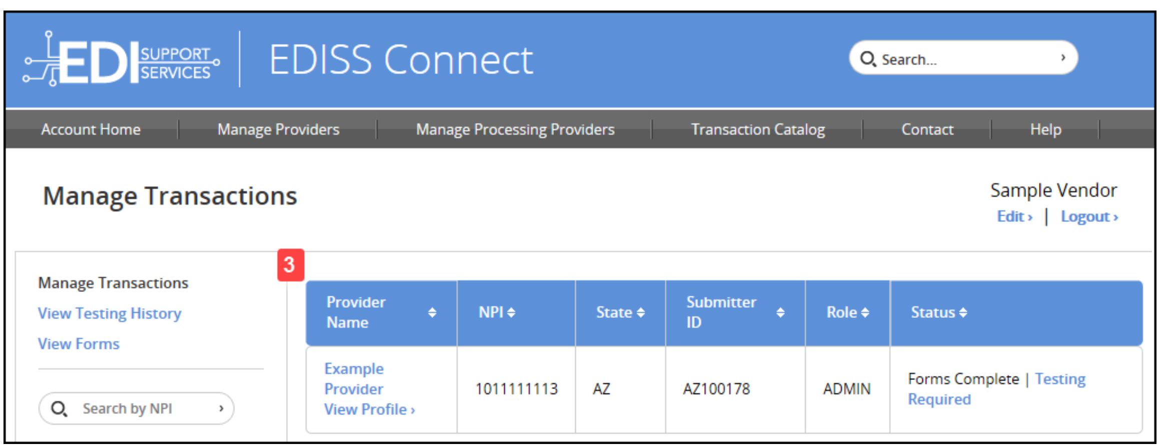
Manage Providers in the main navigation area allows you to view and manage all providers that have selected you as an administrating vendor.

1. Click on the appropriate provider's name.

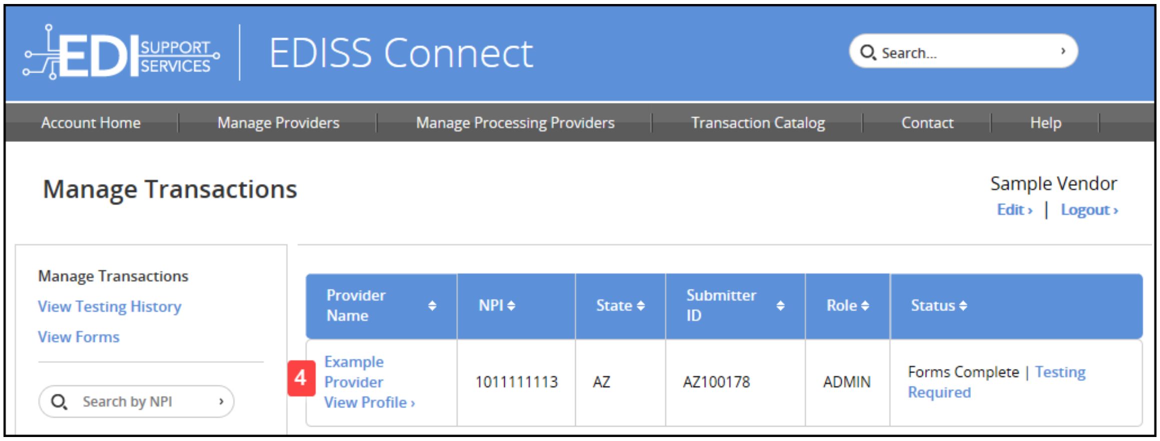
2. You can search by NPI for providers in the display table to the right.



3. The following screen displays the provider's name, NPI, state, Submitter ID if generated, role (administrator or processor), forms status and testing status.



4. Click on the provider's name to access their EDISS Connect profile.



Manage Transactions cont.

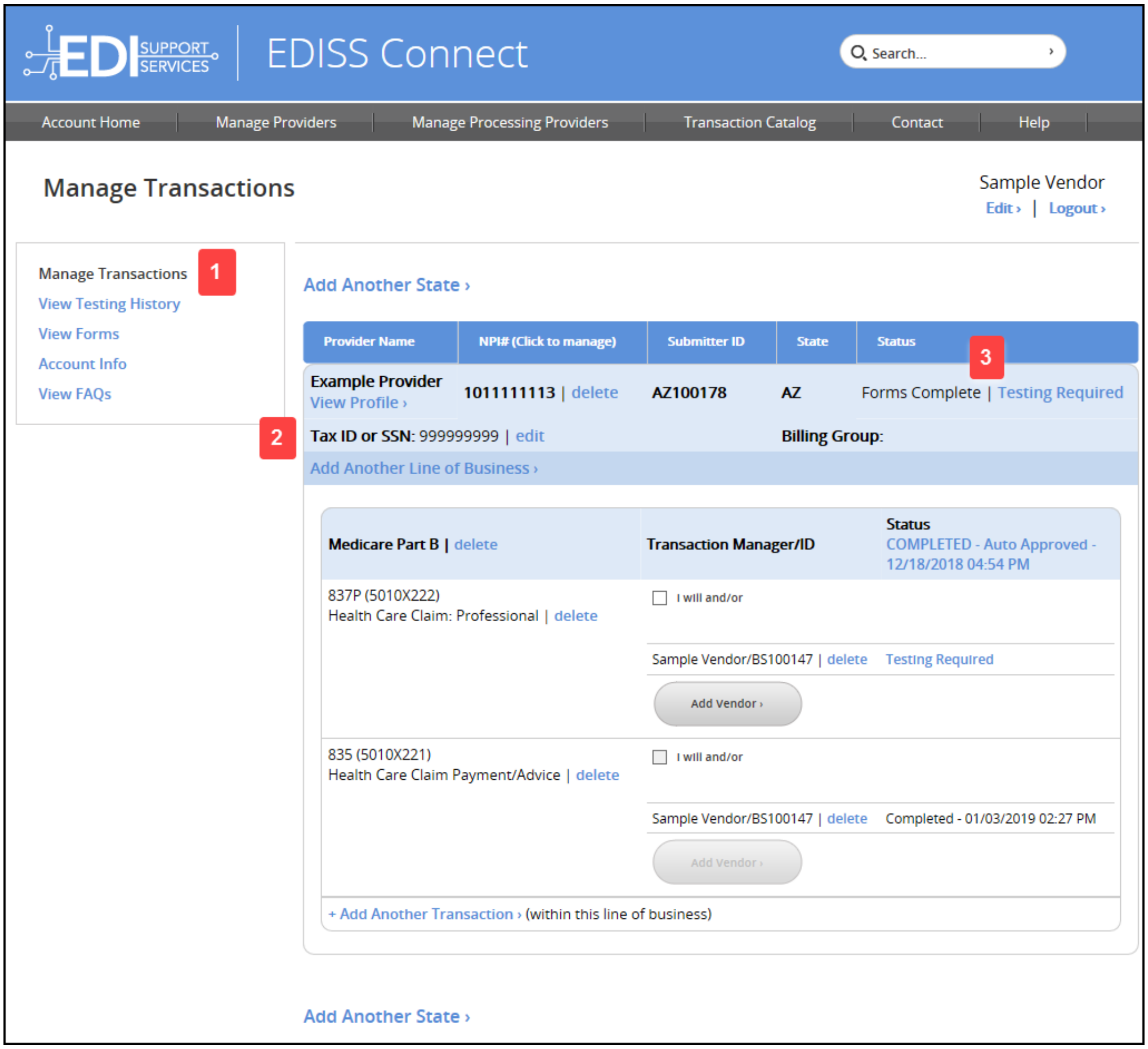
This is the detailed transactions page for a specific provider.

1. Under the **Manage Transactions** section, you can view testing history, forms that are required for the provider and FAQs. You can view the profile of a specific provider, which includes their demographic, security and user information by clicking **Account Info**.

2. You can edit or add a 9-digit numeric Tax ID or SSN associated with an NPI.

3. The **Status** shows forms required or testing required at a glance for the NPI.

Note: *If* ***Forms Required*** *is displayed, the provider must accept the required form(s) by logging into their Connect profile. As a Vendor Administrator, you* ***must*** *add the transactions, but they will not be moved into production until the provider has accepted the required form(s).*



4. The line of business is displayed below with the ability to delete it at any time. On the far right, once required forms are accepted and processed for this specific line of business, a date will appear as well as a statement indicating *COMPLETED - Auto Approved*.

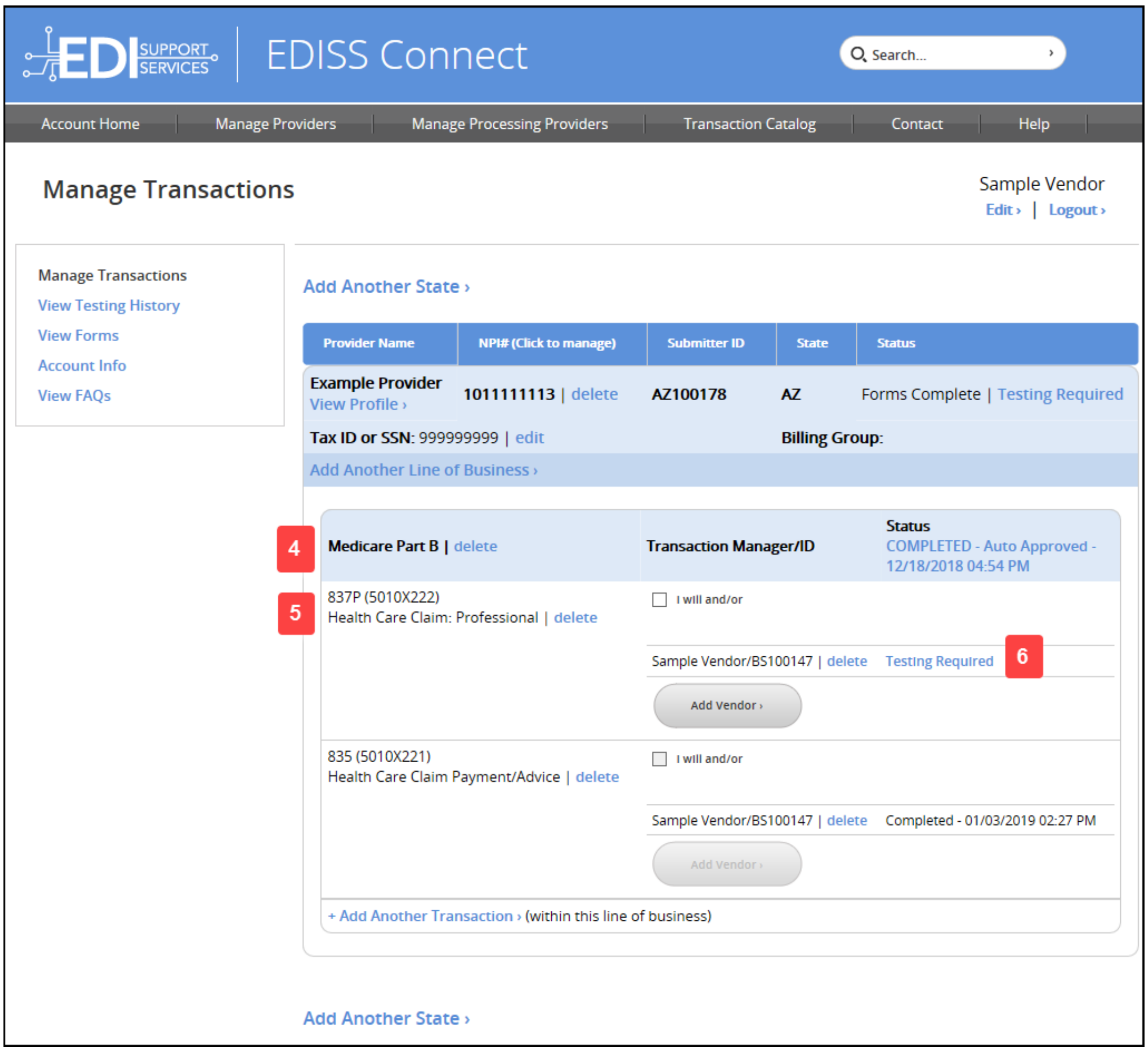
5. Specific transaction types are listed below the line of business with the ability to delete. Removing and reselecting transactions can create delays in the production process.

   You can modify how each transaction will be transmitted, either directly (**I will and/or**) or through a vendor (**Add Vendor**). If selecting **Add Vendor**, a window will appear allowing you to select a vendor, by either searching by name or Submitter ID. Once the correct vendor appears in the window, highlight the vendor by clicking on the name and click **Add**.

Note: *If unable to click the* ***Add Vendor*** *button or select* ***I will and/or****, it means you have already selected the maximum number of submission options. You must remove an existing submission option, before you can add your new submission option.*

6. If a **Testing Required** link is shown, you can click on the link to upload test files into the EIDSS Connect system. Once testing has been completed and approved, *Testing Completed – Approved* will be shown with a production date.

Note: *Only Non-Medicare lines of business can be tested through EDISS Connect. Medicare lines of business will need to be tested through the EDI Gateway System.*

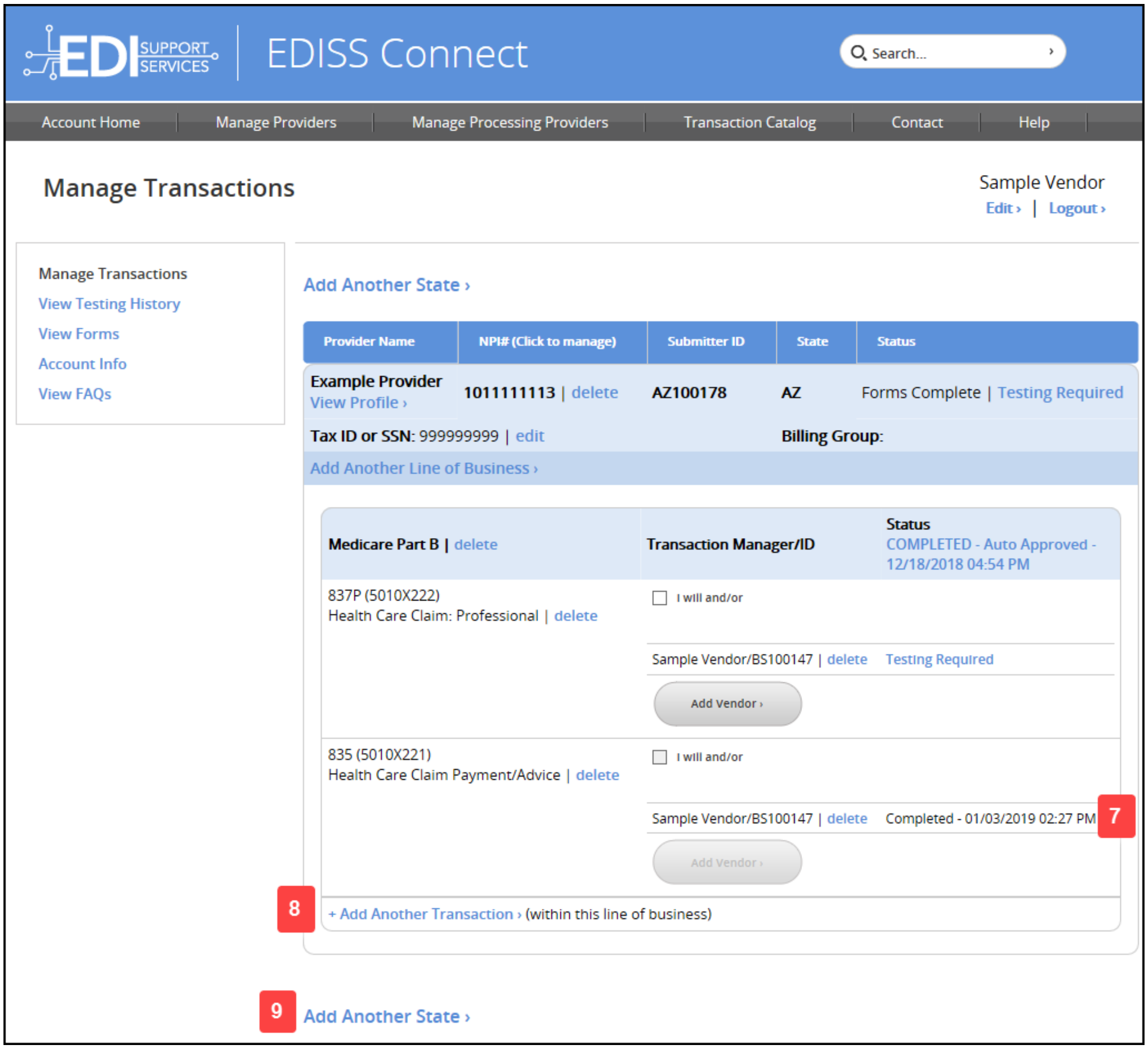


7. For transactions not needing testing or when they have been moved into production, the production date and statement *Completed* will be displayed.

Note: *Production claims can be submitted starting at 8:00 AM (CST) the following business day.*

8. To add another transaction for this same line of business, click **Add Another Transaction**.

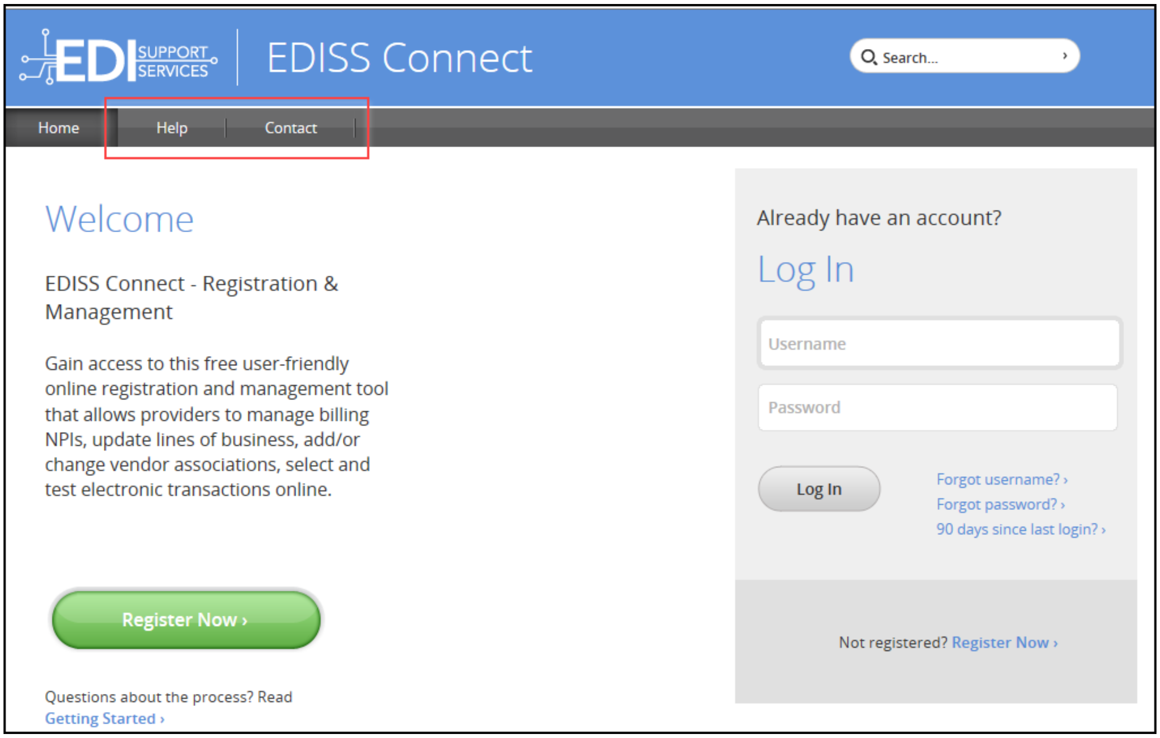
9. To add another state for this same NPI, click **Add Another State**.



Note: *The 837 transactions allow up to two submission methods, except for North Dakota Medicaid, as they can only have one selected. All other transactions allow only one submission/retrieval method.*

Help and Contact Information

Help topics and contact information are available under the **Help** or **Contact** tab on any screen within EDISS Connect.



Help

The following items are provided on the **Help** page for assistance in registering or managing EDISS accounts:

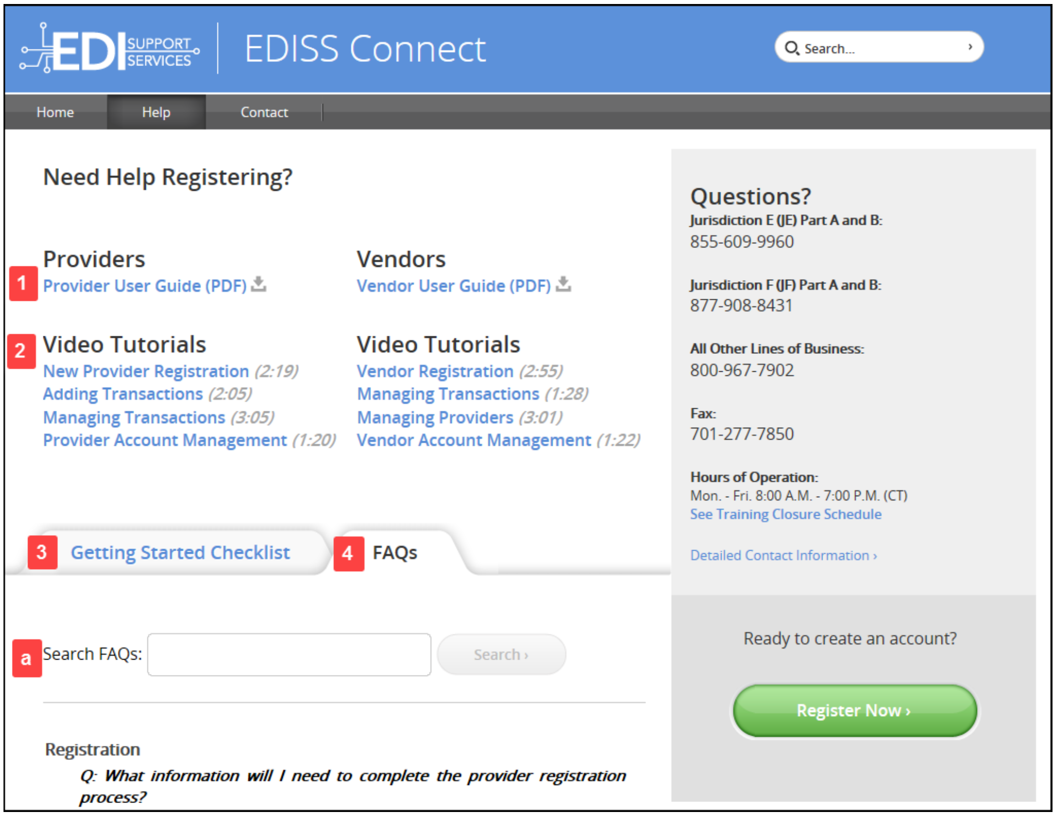
1. Provider and Vendor User Guides

2. Video Tutorials

3. Getting-Started Checklist

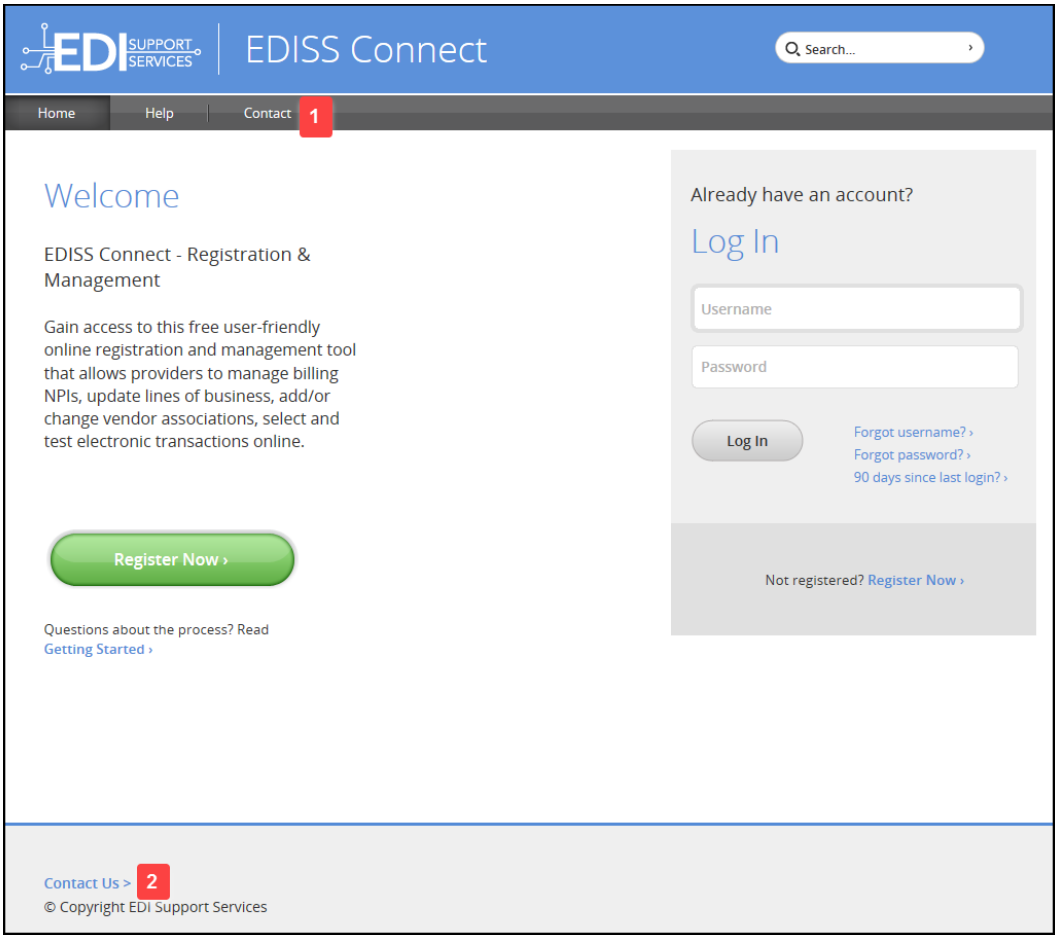
4. Frequently Asked Questions (FAQs)

    a. A quick search is available that will load questions related to your search. You can clear your search results at any time and start a new search. Questions are listed by category with the respective answers.



Contact Information

EDISS Contact information is available either under **Contact** in the toolbar or **Contact Us** at the bottom of each EDISS Connect screen.



Contact Information

Hours of Operation

Mon – Fri: 8:00 AM – 7:00 PM (CT)
See Training Closure Schedule

Medicare Lines of Business

Jurisdiction E (JE) Part A and B: 855-609-9960
CA, NV, HI, Guam, American Samoa, Northern Mariana Islands

Jurisdiction F (JF) Part A and B: 877-908-8431 AK, AZ, ID, MT, ND, OR, SD, UT, WA, WY

All Other Lines of Business

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