

# EDI Support Services

## *User Documentation for Vendors on EDISS Connect*

### ***Purpose of the User Documentation for Vendors on EDISS Connect***

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.

### ***Accessing EDISS Connect Website***

<https://connect.edissweb.com>

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

### **Quick Access Links:**

**Accessing EDISS Connect Website**

**Self-Registration**

- **Create Account**

**Existing Vendor Accounts and Life Span**

**Dashboard and Transaction Catalog Overview**

- **Vendor Dashboard**
- **Transaction Catalog**
- **Selecting States**
- **Adding Line(s) of Business**
- **Adding Transactions**

**Setup Complete**

**Edit Profile**

**Managing Users**

**Adding a User**

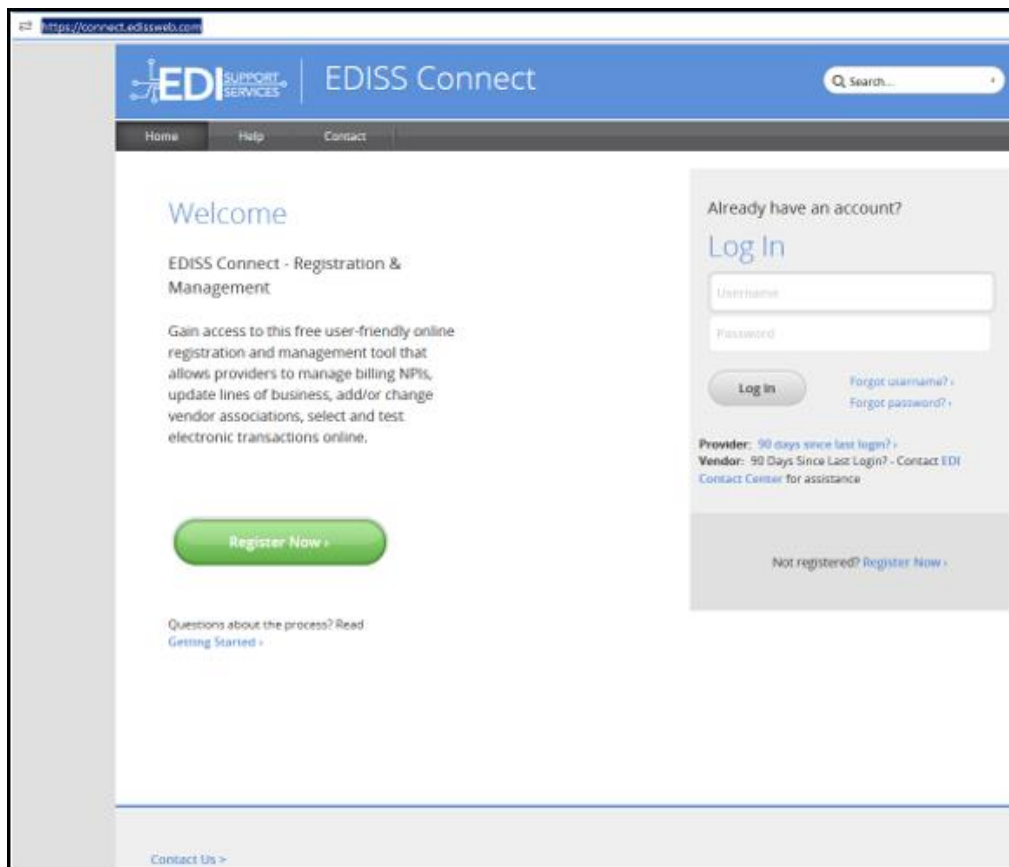
**Managing Processing Providers**

**Managing Providers**

**Accepting/Rejecting Administration of Providers' Profile**

**Manage Transactions**

## User Documentation for Vendors on EDISS Connect



### 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.

### Create Account

1. If you are new to EDISS Connect, you will click on the green **Register Now** to create an online account for managing the online profile and information.

## User Documentation for Vendors on EDISS Connect

The screenshot shows the EDISS Connect website interface. At the top, there is a blue header with the EDI Support Services logo and the text 'EDISS Connect'. Below the header is a navigation bar with 'Home', 'Help', and 'Contact' links. The main content area is divided into two columns. The left column has a 'Welcome' heading, followed by 'EDISS Connect - Registration & Management'. Below this is a paragraph describing the tool's capabilities. A red square with the number '1' is positioned to the left of a green 'Register Now >' button. Below the button is a link for 'Getting Started >'. The right column has a 'Log In' section with a 'Log In' button and links for 'Forgot username?' and 'Forgot password?'. Below the login section are links for 'Provider: 90 days since last login?' and 'Vendor: 90 Days Since Last Login? - Contact EDI Contact Center for assistance'. At the bottom of the page, there is a footer with 'Contact Us >', 'Privacy Policy', and '© Copyright EDI Support Services'.

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

2. Select **Vendor**.
3. The HTTPS Connectivity option should only be selected by Trading Partners planning to use SOAP or MIME protocols to submit 835/276 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>.
4. Click **Continue**.

## User Documentation for Vendors on EDISS Connect

**EDISS Connect** | SUPPORT SERVICES

Home | Help | Contact

### Create Account

1 Create Account | 2 Account Security | 3 Account Settings | 4 Finish

I'm a:

**Provider** > This is the primary provider with a billing NPI associated to set-up the account. You'll be able to add additional users and NPI's following setup of the account.

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

**Vendor** > This is a billing service, clearinghouse or software vendor that is working with a provider or group of provider accounts to process or manage electronic transactions.

**3** Only check mark this box if it is known that this account will be used for HTTPS Connectivity related transactions defined in the [CORE Operating Rules](#). Otherwise, do not check this box.

**4** [Continue >](#)

#### Questions?

**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

**Fax:**  
701-277-7850

**Hours of Operation:**  
Mon. - Fri. 8:00 A.M. - 7:00 P.M. (CT)  
[See Training Closure Schedule](#)

[Detailed Contact Information >](#)

5. 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.
6. Enter the **Public Contact Information**. This information is for providers and will appear on the 5010 Approved Vendor list for Noridian Medicare.
7. Click **Continue**.

# User Documentation for Vendors on EDISS Connect

EDI SUPPORT SERVICES | EDISS Connect

Home Help Contact

## Create Account

1 Create Account 2 Account Security 3 Account Settings 4 Finish

Back \* = Required

### 5 Company Information

Company Name\*:

Phone\*:

Fax\*:

Address 1\*:

Address 2:

City\*:

State\*:

ZIP\*:

---

### Contact Information

This is the primary contact for this account. You will be able to enter additional users after your account is created.

First Name\*:

Last Name\*:

Email\*:

Confirm Email\*:

---

### 6 Public Contact information

This will be the contact information for providers and will appear on the 5010 Approved Vendor list for Noridian Medicare.

Phone\*:

Email\*:

Confirm Email\*:

7

#### Questions?

Jurisdiction E (JE) Part A and B:  
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[Detailed Contact Information](#)

## ***User Documentation for Vendors on EDISS Connect***

8. Choose a username for your account. The username must be unique, between 8-20 characters and contain no spaces or special characters.
9. 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
  - a special character: \$, #, \*, - or \_
  - and contain no spaces

Then confirm your password.

10. Complete the Text Verification by entering the characters from the image.
11. Additionally, you will need to agree to the EDISS Terms and Conditions as well as the HIPPA Terms and Conditions before you will be allowed to continue with your registration.
12. Click **Continue**.

**Note:** *Connect username accounts that do not stay active will be deactivated or removed. Please see Existing Vendor Accounts and Life Span section below.*

## User Documentation for Vendors on EDISS Connect

**Account Security**

1 Create Account   2 Account Security   3 Account Settings   4 Finish

Back \* - Required


**8** Username\* :

Your username must be 8-20 characters and contain no spaces or special characters.

**9** Password\* :

Confirm password\* :

Your password must be at least 8 characters, must contain one upper case letter, one lowercase letter, one digit and one special character.

**10** Text Verification\* 

EDISS Terms and Conditions\* :

READ THE FOLLOWING TERMS AND CONDITIONS CAREFULLY BEFORE CONTINUING. THE USER MUST ACCEPT THESE TERMS AND CONDITIONS TO OBTAIN ACCESS TO THE EDISS CONNECT SYSTEM. IF THE USER DOES NOT AGREE TO THESE TERMS AND CONDITIONS, THE USER WILL NOT BE ABLE TO USE EDISS CONNECT. IT IS SUGGESTED THAT THE USER CHECK THESE TERMS PERIODICALLY FOR CHANGES.

I agree to the EDISS Terms and Conditions

**11** HIPAA Terms and Conditions\* :

BY CLICKING THE "I AGREE" CHECKBOX DISPLAYED AS PART OF THE EDISS REGISTRATION IMPLEMENTATION PROCESS, YOU AGREE TO THE FOLLOWING TERMS AND CONDITIONS (THE "AGREEMENT") REGARDING PROTECTED HEALTH INFORMATION UNDER THIS HIPAA BUSINESS ASSOCIATE AGREEMENT AS AMENDED OR MODIFIED BY THE HEALTH INFORMATION

I agree to the HIPAA Terms and Conditions

**12**

13. 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**



## User Documentation for Vendors on EDISS Connect

**Vendor**, you will be asked the name of your software, and your registration will be complete.

EDISS SUPPORT SERVICES | EDISS Connect

Home | Help | Contact

Account Settings

1 Create Account | 2 Account Security | 3 Account Settings | 4 Finish

Back

What type of vendor are you?

Billing Service >

Clearing House >

Software Vendor >

\* = Required

Questions?

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

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

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(CT)  
[See Training Closure Schedule](#)

[Detailed Contact Information >](#)

14. 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.

15. 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](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) for all NPIs prior to production status being granted.*

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

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



## User Documentation for Vendors on EDISS Connect

18. Click **Continue**.

EDISS Connect

Home | Help | Contact

Account Settings

1 Create Account | 2 Account Security | 3 Account Settings | 4 Finish

Back \* = Required

Will you be the administrator on behalf of one or more providers?\*:  Yes **14**  No

By default you will receive blanket approval after the successful transmission and receipt of each claim/transaction type. This means you are not required to submit test files for each provider you manage.

**15**  I want blanket approval (by unchecking this box you will be required to submit test files for each provider you manage)

Network Service Agreement\*:

**16** BY CLICKING THE "I AGREE" BUTTON DISPLAYED AS PART OF THE ONLINE REGISTRATION PROCESS, YOU AGREE TO THE FOLLOWING NETWORK SERVICE AGREEMENT (THE "AGREEMENT") GOVERNING YOUR USE OF THE EDISS REGISTRATION & MANAGEMENT SERVICE, INCLUDING OFFLINE COMPONENTS (COLLECTIVELY THE "SERVICES"). By accessing and using the Software, You agree to be bound to the

**17**  I accept the Network Service Agreement

**18** Continue >

Questions?

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

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

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800-967-7902

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[See Training Closure Schedule](#)

[Detailed Contact Information >](#)

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

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

21. Once complete, click **Continue**.

## User Documentation for Vendors on EDISS Connect

EDISS SUPPORT SERVICES EDISS Connect

Home Help Contact

### Account Settings

1 Create Account 2 Account Security 3 Account Settings 4 Finish

Back \* = Required

19 What software will you use for transactions? \*:

ABILITY|PC-ACE (Free software provided by EDISS)

Other

Software Licensing Agreement (ABILITY|PC-ACE) \*:

BY CLICKING THE "I AGREE" BUTTON DISPLAYED AS PART OF THE ONLINE REGISTRATION PROCESS, YOU AGREE TO THE FOLLOWING TERMS AND CONDITIONS (THE "AGREEMENT") GOVERNING YOUR USE OF THE EDISS REGISTRATION & MANAGEMENT SERVICE, INCLUDING OFFLINE COMPONENTS (COLLECTIVELY, THE "SERVICE"). IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THESE TERMS AND CONDITIONS. IN WHICH CASE THE

20  I accept the Software Licensing Agreement

21 Continue >

### Questions?

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

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(CT)

[See Training Closure Schedule](#)

[Detailed Contact Information >](#)

22. 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.

## User Documentation for Vendors on EDISS Connect

The screenshot shows the 'Finish' page of the EDISS Connect registration process. At the top, there is a navigation bar with 'Home', 'Help', and 'Contact' links, and a search bar. Below the navigation bar, a progress indicator shows four steps: 1. Create Account, 2. Account Security, 3. Account Settings, and 4. Finish. The 'Finish' step is highlighted, and the text 'Account Successfully Created!' is displayed in the center. Below this, a message says 'Thank you for registering for EDI Support Services.' and provides instructions on how to log in, including a link to the 'User Guide'. A red box with the number '22' is positioned above a 'Log In to my Profile >' button. On the right side, there is a 'Questions?' section with contact information for Jurisdiction E (IE) Part A and B (855-609-9960), Jurisdiction F (IF) Part A and B (877-908-8431), All Other Lines of Business (800-967-7902), Fax (701-277-7850), and Hours of Operation (Mon. - Fri. 8:00 A.M. - 7:00 P.M. (CT)). There are also links for 'See Training Closure Schedule' and 'Detailed Contact Information >'.

**Note:** The next screen will bring you to a log in page. If this does not work for any reason, the URL is <https://connect.edissweb.com>. Enter your username and password to continue.

The screenshot shows the 'Welcome' page of the EDISS Connect registration and management tool. At the top, there is a navigation bar with 'Home', 'Help', and 'Contact' links, and a search bar. Below the navigation bar, the text 'Welcome' is displayed in a large font. Underneath, it says 'EDISS Connect - Registration & Management' and provides a brief description of the tool: 'Gain access to this free user-friendly online registration and management tool that allows providers to manage billing NPIs, update lines of business, add/or change vendor associations, select and test electronic transactions online.' A green 'Register Now >' button is located at the bottom left. At the bottom of the page, there is a link: 'Questions about the process? Read Getting Started >'. On the right side, there is a 'Log In' section with the heading 'Already have an account?'. It includes a 'Log In' button, a 'Forgot username? >' link, a 'Forgot password? >' link, and a '90 days since last login? >' link. At the bottom of the login section, there is a link: 'Not registered? Register Now >'.

## ***User Documentation for Vendors on EDISS Connect***

### ***Answer Security Questions***

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

1. Select the questions and provide your 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)

**Note:** *If an answer is too short, an error message will display at the top of the page in red.*

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

## User Documentation for Vendors on EDISS Connect

EDI SUPPORT SERVICES

If you forget your password, you can access your account by answering your security questions.

Please choose your questions and answers that can be used to verify your identity in case you forget your password. Because the answers to these questions can be used to access your account, be sure to supply answers that are not easy for others to guess or discover.

Please type your security answers

— Please select a question item from the list — 1

○

— Please select a question item from the list —

○

— Please select a question item from the list —

○

— Please select a question item from the list —

○

— Please select a question item from the list —

○

— Please select a question item from the list —

○

Save Answers 2

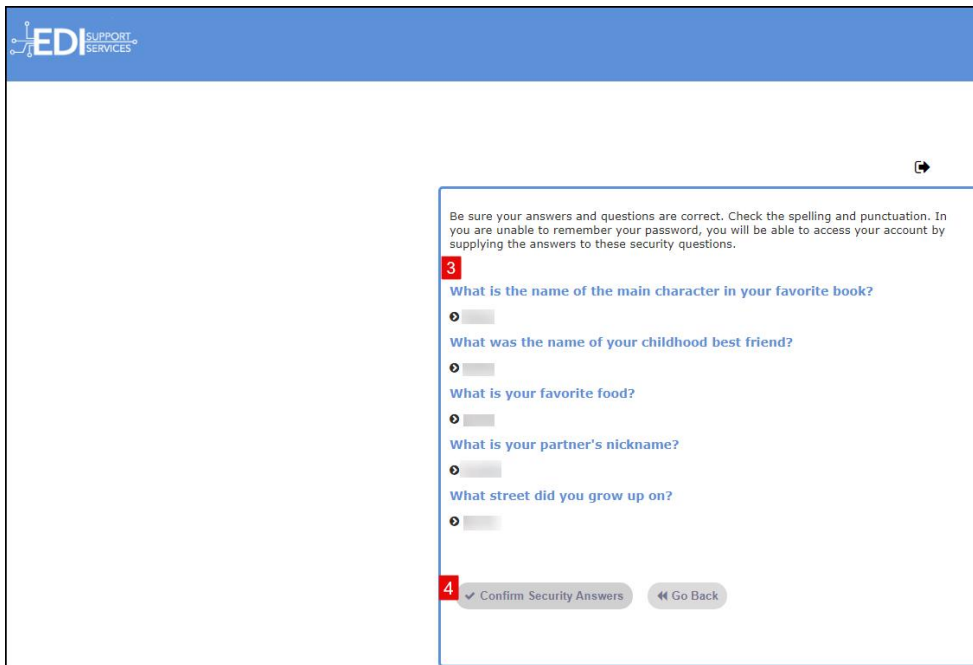
3. After clicking **Save Answers**, you will be taken to a screen where all five security questions and answers are displayed.

**Note:** 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, you can click on **Go Back**. This will allow you to modify your questions and answers. Be aware that you will have to redo all questions and answers.

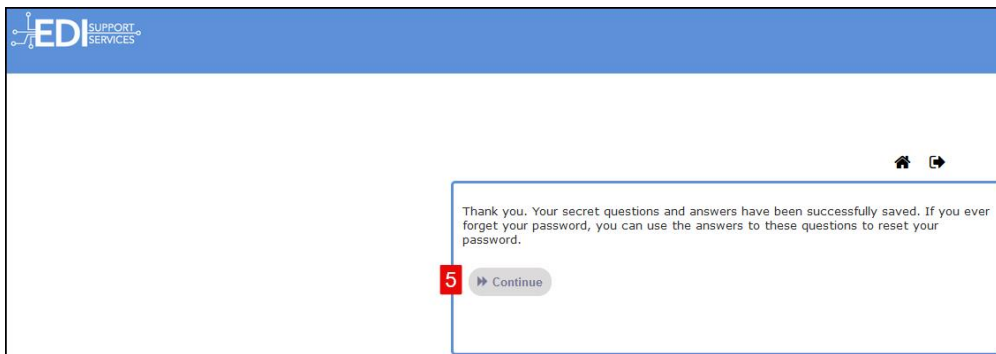
4. Click **Confirm Security Answers**.

## User Documentation for Vendors on EDISS Connect



The screenshot shows the EDI Support Services logo in the top left corner. A central white box contains the following text: "Be sure your answers and questions are correct. Check the spelling and punctuation. In you are unable to remember your password, you will be able to access your account by supplying the answers to these security questions." Below this is a red square with the number "3". The questions are: "What is the name of the main character in your favorite book?", "What was the name of your childhood best friend?", "What is your favorite food?", "What is your partner's nickname?", and "What street did you grow up on?". Each question has a radio button and a text input field. At the bottom of the box is a red square with the number "4", a checkmark icon, and the text "Confirm Security Answers", followed by a "Go Back" button.

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



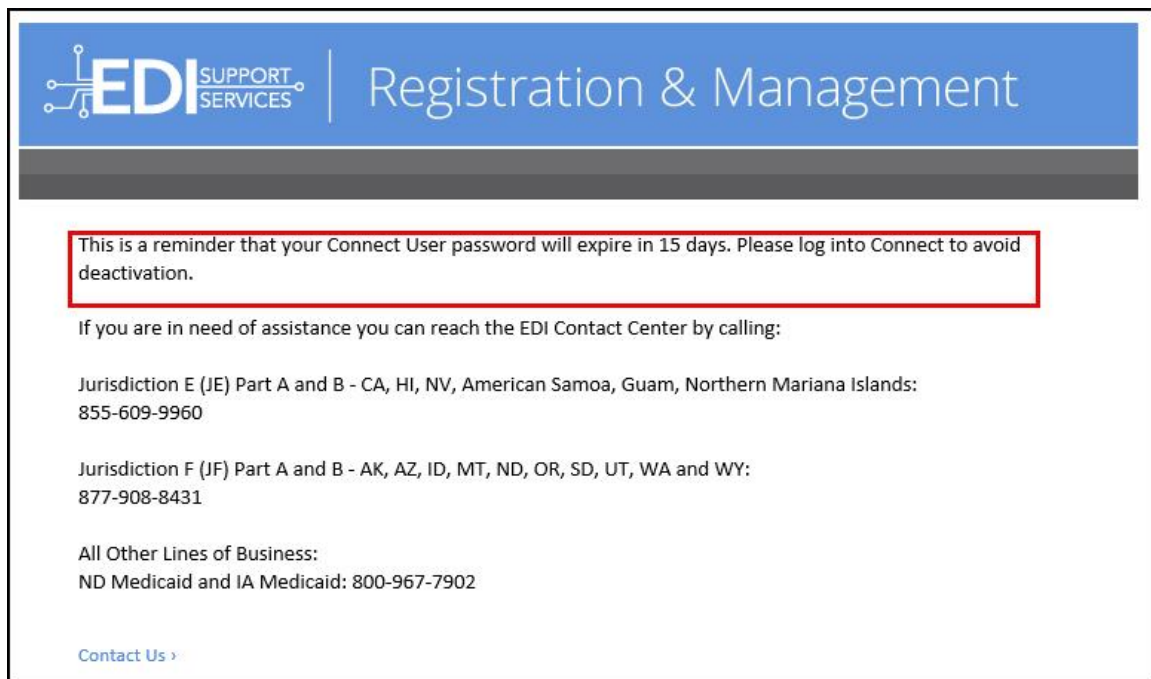
The screenshot shows the EDI Support Services logo in the top left corner. A central white box contains the following text: "Thank you. Your secret questions and answers have been successfully saved. If you ever forget your password, you can use the answers to these questions to reset your password." Below this is a red square with the number "5" and a "Continue" button with a right-pointing arrow.

### *Existing Vendor Accounts and Life Span*

It is recommended that Vendors log in as often as possible to keep their account active on EDISS Connect. There are two life spans: 60 days and 90 days.

A reminder email is sent to the user's email address at **45 days** of inactivity. (see image below)

## User Documentation for Vendors on EDISS Connect



The screenshot shows the EDI Support Services logo on the left and the text "Registration & Management" on the right, both within a blue header bar. Below the header is a dark grey bar. A red-bordered box contains the text: "This is a reminder that your Connect User password will expire in 15 days. Please log into Connect to avoid deactivation." Below this box, the text reads: "If you are in need of assistance you can reach the EDI Contact Center by calling:" followed by three contact options: "Jurisdiction E (JE) Part A and B - CA, HI, NV, American Samoa, Guam, Northern Mariana Islands: 855-609-9960", "Jurisdiction F (JF) Part A and B - AK, AZ, ID, MT, ND, OR, SD, UT, WA and WY: 877-908-8431", and "All Other Lines of Business: ND Medicaid and IA Medicaid: 800-967-7902". At the bottom left, there is a link "Contact Us >" in blue text.

If a user has not logged in after **60 days** of inactivity, the account is de-activated, and the user will need to contact EDICC.

If a user has not logged in after **90 days** of inactivity, the account is removed, and the user will need to contact EDICC. (see image below)



## User Documentation for Vendors on EDISS Connect

EDI SUPPORT SERVICES | EDISS Connect

Home | Help | Contact

Search...

### Welcome

EDISS Connect - Registration & Management

Gain access to this free user-friendly online registration and management tool that allows providers to manage billing NPIs, update lines of business, add/or change vendor associations, select and test electronic transactions online.

[Register Now >](#)

Questions about the process? Read [Getting Started >](#)

Already have an account?

### Log In

Admin Username

Password

[Log In](#) [Forgot username? >](#) [Forgot password? >](#)

**Provider:** [90 days since last login? >](#)

**Vendor:** [90 Days Since Last Login? - Contact EDI Contact Center for assistance](#)

Not registered? [Register Now >](#)

### *Dashboard and Transaction Catalog Overview*

This section shows you how to manage your profile, begin managing users, set up transactions available in your catalog and test claim files.

#### *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**.

## User Documentation for Vendors on EDISS Connect

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.

The screenshot shows the EDISS Connect Vendor Dashboard. At the top, there is a navigation bar with the EDI Support Services logo and the text 'EDISS Connect'. Below the navigation bar, there are several menu items: Account Home, Manage Providers, Manage Processing Providers, Transaction Catalog, Contact, and Help. The main content area is divided into several sections. On the left, there is a 'Welcome Sample Vendor' message with a 'Logout' link. Below this is a 'Manage Providers' section with a search bar and a table of providers. The table has columns for Provider Name, NPI #, State, Your Role, Create Date, and Status. The providers listed are Sample Provider2, Sample Provider, John Doe, and Example Provider. Below the table are links for 'Manage Providers' and 'Manage Processing Providers'. On the right, there is an 'Account Profile' section with a 'Manage Users' button. Below this is a 'How to Add a Transaction' section with a list of steps: 1. Select state(s), 2. Select line(s) of business, and 3. Select transactions you want available for providers to choose. Below this list is an 'Add Transaction' button and a link for 'Manage Transaction Catalog'. On the far right, there is a 'Testing' section with a search bar for testing history.

Provider Name	NPI #	State	Your Role	Create Date	Status
Sample Provider2	1011111112	AZ	Processor	12/04/2018	Forms Required Testing Required
Sample Provider	1011111111	AZ	Processor	12/10/2018	Forms CompleteTesting Required
John Doe <a href="#">View Profile</a>	1011111117	AZ	Administrator	12/14/2018	Forms CompleteTesting Required
Example Provider <a href="#">View Profile</a>	1011111113	IA	Administrator	12/10/2018	Forms CompleteTesting Required

### 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.

## User Documentation for Vendors on EDISS Connect

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.

The screenshot shows the EDISS Connect interface. At the top, there is a navigation bar with the following items: Account Home, Manage Providers, Manage Processing Providers, **1** Transaction Catalog, Contact, and Help. A search bar is located on the right side of the navigation bar.

The main content area is titled 'Transaction Catalog'. On the right side of this area, there are links for 'Sample Vendor', 'Edit', and 'Logout'.

On the left side, there is a sidebar with the following sections:

- 2** Manage Transactions
  - Add Transactions to Catalog
  - Search All Testing History
  - Search by Name
- 3** Filter Results by:
  - Status:
    - Testing Required
    - Pending Approval
    - Blanket Approved
    - No Testing Required
  - State:
    - AZ
    - CA
    - IA

The main table displays the following data:

Line Of Business	State	Status
<b>4</b> Medicaid Professional of Iowa	IA	Pending Approval (837P) <b>5</b>
Medicare Part A	AZ	Pending Approval (837I)
Medicare Part B	AZ	Pending Approval (837P)
Medicare Professional of Northern California	CA	Pending Approval (837P)
Medicare Professional of Southern California	CA	Pending Approval (837P)

### Selecting State(s)

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

## User Documentation for Vendors on EDISS Connect

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**.

The screenshot displays the 'Register Transaction' page in the EDISS Connect system. The page header includes the EDI Support Services logo and the text 'EDISS Connect'. A search bar is located in the top right corner. The navigation menu contains 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. The main content area is titled 'Register Transaction' and features a progress bar with three steps: '1 Select State(s)', '2 Line(s) of Business', and '3 Transactions'. The '1 Select State(s)' step is currently active. Below the progress bar, there are two columns: 'States Available' (labeled with a red '1') and 'State(s) Selected' (labeled with a red '2'). The 'States Available' column contains a list of states: Alaska, Arizona, California, Hawaii, Iowa, and Idaho, with a checkbox for 'Select all available states'. The 'State(s) Selected' column is currently empty. Between the columns is a double-headed arrow and the text 'Simply drag and drop or use the add/remove buttons below'. Below this text are 'Add' and 'Remove' buttons, with a red '3' next to the 'Remove' button. At the bottom right, there is a green 'Continue' button with a red '4' next to it.

### Adding 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.

## User Documentation for Vendors on EDISS Connect

EDISS Connect

Account Home | Manage Providers | Manage Processing Providers | Transaction Catalog | Contact | Help

Search...

### Register Transaction

Sample Vendor  
Edit > | Logout >

1 Select State(s) | 2 Line(s) of Business | 3 Transactions

Back

\* = Required

**1** What type of transactions will you be performing? Check all that apply.

Professional (1500 form)  Institutional (UB92 or UB04 form)

**2** Select your line(s) of business: Check all that apply.

**Montana**  
 Medicare Part B

**Idaho**  
 Medicare Part B

**3** Continue >

### Adding 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).

## User Documentation for Vendors on EDISS Connect

EDISS Connect

Account Home | Manage Providers | Manage Processing Providers | Transaction Catalog | Contact | Help

Register Transaction

Sample Vendor  
[Edit](#) | [Logout](#)

1 Select State(s) | 2 Line(s) of Business | 3 Transactions

Back

\* = Required

Medicare Part B - Idaho Check all transactions you will be processing:

Enroll	Claim Type (version)	Description
<input checked="" type="checkbox"/>	837P (5010X222)	Health Care Claim: Professional
<input checked="" type="checkbox"/>	835 (5010X221)	Health Care Claim Payment/Advice
<input type="checkbox"/>	276 (5010X212)	Claim Status Request

Medicare Part B - Montana Check all transactions you will be processing:

Enroll	Claim Type (version)	Description
<input checked="" type="checkbox"/>	837P (5010X222)	Health Care Claim: Professional
<input checked="" type="checkbox"/>	835 (5010X221)	Health Care Claim Payment/Advice
<input checked="" type="checkbox"/>	276 (5010X212)	Claim Status Request

2 Submit

### Setup Complete

1. The transactions will now appear in your Transactions 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**.

## User Documentation for Vendors on EDISS Connect

Account Home | Manage Providers | Manage Processing Providers | Transaction Catalog | Contact | Help

### Register Transaction

Sample Vendor  
Edit > | Logout >  
Print this page

**1 Setup Complete!**

Thank you for setting up a transaction. Below you'll find the information you will need to submit to EDISS in order for the transaction(s) to be complete and ready to submit claims. You will be able to see all of the items that require action in the manage transactions link.

#### Summary

**Medicare Part B - Idaho**  
837P (5010X222) - Health Care Claim: Professional  
835 (5010X221) - Health Care Claim Payment/Advice

**Medicare Part B - Montana**  
837P (5010X222) - Health Care Claim: Professional  
835 (5010X221) - Health Care Claim Payment/Advice  
276 (5010X212) - Claim Status Request

If any of this information is inaccurate, you will have the ability to edit using [manage transactions](#).

**2 Manage Transactions >** Or [Add Transactions >](#)

### Edit Profile

Click **Edit Profile** from *Account Home* to access and manage the demographics of the company.

1. If you click on **Security Settings**, you are able to change the password.
2. **Account Settings** can be set to either Blanket Approval (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.



## User Documentation for Vendors on EDISS Connect

- At any time, you can update your company information and save it to your profile.
- To logout of EDISS Connect, click the **Logout** link on any page.

The screenshot displays the EDISS Connect user interface. At the top, there is a navigation bar with the EDI Support Services logo and the text 'EDISS Connect'. Below this is a secondary navigation bar with links for 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. The main content area is titled 'Profile' and includes a 'Logout' link for 'Sample Vendor'. The profile is divided into several sections: 'Account Settings' (Blanket Approved), 'Company Information' (with a red '5' indicating a required field), 'Security Settings' (with a red '1'), 'Software' (with a red '3'), and 'Account Created' (11/05/2018). The 'Company Information' section contains fields for Company Name, Phone, Fax, Address 1, Address 2, City, State, and ZIP. The 'Security Settings' section includes 'Account Type' (Administrator), 'User Role' (Admin), and 'Submitter ID' (BS100147). A 'Manage Users' button is located at the bottom of the sidebar.

### Managing Users

- Manage Users displays the users associated with the account.
- The account name is shown in the first column. To view details about a specific user, click the name in the list.
- The **Last Login** column shows the date when that user last logged into the system. If the registration is incomplete, the status displays

## User Documentation for Vendors on EDISS Connect

with the ability to resend a complete online registration notification. You can also delete a user from the system in this column.

Account Home | Manage Providers | Manage Processing Providers | Transaction Catalog | Contact | Help

### Manage Users

Sample Vendor  
[Edit >](#) | [Logout >](#)

**1** Account Name:  
Sample Vendor

[View Users](#)  
[Add User](#)

<b>2</b> Name (Click to Edit) ↕	Username ↕	Security Role ↕	Last Login ↕ <b>3</b>
Jane Doe	janedoe32	Admin	Incomplete   <a href="#">Resend Notification</a>
John Doe	johndoe44	Admin	12/18/2018
Sample Vendor	samplevendor	Admin	12/18/2018   <a href="#">Delete</a>


**Note:** If a user has been setup, but has not completed their registration within 30 days, they will be automatically deleted from the system.

### Adding a User

A user can be added to the account by an existing user by clicking **Add User** in the left column or on the Manage User page. IF no current users exist, EDICC needs to be contacted for help regaining access to the account. Once in the system, the below steps need to be followed.

1. 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 User Registration** within the email to finish their registration.

## User Documentation for Vendors on EDISS Connect



# 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 below 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:
- 3** [Complete User 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 the appropriate phone number below.

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

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

All Other Lines of Business:  
ND Medicaid and IA Medicaid: 800-967-7902

[Contact Us](#)

©EDISS Registration & Management

### 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.

## User Documentation for Vendors on EDISS Connect

EDISS Connect

Account Home | Manage Providers | **Manage Processing Providers** | Transaction Catalog | Contact | Help

Welcome Sample Vendor [Logout >](#)

Manage Providers

Provider Name	NPI #	State	Your Role	Create Date	Status
Sample Provider2 <a href="#">View Profile &gt;</a>	1011111112	AZ	Administrator	12/04/2018	Forms Complete Testing Required
Sample Provider 5 <a href="#">View Profile &gt;</a>	1011111115	AZ	Administrator	12/12/2018	Forms Complete Testing Required
John Doe <a href="#">View Profile &gt;</a>	1011111117	AZ	Administrator	12/14/2018	Forms Complete Testing Required
Example Provider <a href="#">View Profile &gt;</a>	1011111113	AZ	Administrator	12/18/2018	Forms Complete Testing Required
Sample Provider	1011111111	AZ	Processor	12/10/2018	Forms Complete Testing Complete

[Manage Providers >](#)  
**1** [Manage Processing Providers >](#)

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

EDISS Connect

Account Home | Manage Providers | **Manage Processing Providers** | Transaction Catalog | Contact | Help

Manage Processing Providers [Sample Vendor Edit >](#) | [Logout >](#)

Manage My Providers

Search by:

**3**

Provider Name	Registration NPI	Role	Date Added
Sample Provider2	1011111112	Processor	12/04/2018
Sample Provider	1011111111	Processor	12/10/2018

**2**

Showing 2 results.

## ***User Documentation for Vendors on EDISS Connect***

4. The detailed transactions page for a specific provider shows the provider's name, NPI, Submitter ID, and Tax ID/SSN.
5. The **Status** shows forms required or testing required at a glance for the NPI. If **Forms Required** is displayed, the provider must log back into their account and accept the required form(s).

**Note:** *If the form is not accepted by the provider, this will cause a delay in registration.*

**Note:** *This section is not used to verify status of the account.*

6. 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*.
7. If a Testing Required link is shown, you can click on the link to upload test files in the EDISS 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.

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

**Note:** Once the provider has been granted production status, it is recommended that you wait the overnight cycle before sending any claims on their behalf to avoid any claim rejections.

## User Documentation for Vendors on EDISS Connect

The screenshot displays the 'Manage Transactions' interface. At the top, there is a navigation bar with 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. A search bar is located on the right. The main content area is titled 'Manage Transactions' and includes a sidebar with links for 'View Testing History', 'View Forms', and 'View FAQs'. The main table lists transactions with the following data:

Provider Name	NPI# (Click to manage)	Submitter ID	State	Status
Sample Provider	1011111111	AZ100161	AZ	Forms Complete   Testing Required
Tax ID or SSN: [Redacted]		Billing Group:		
Medicare Part B		Transaction Manager/ID	Status	
837P (5010X222) Health Care Claim: Professional		<input type="checkbox"/> I will and/or	COMPLETED - Auto Approved - 12/10/2018 02:04 PM	
		Sample Vendor/BS100147	Testing Required	
835 (5010X221) Health Care Claim Payment/Advice		<input type="checkbox"/> I will and/or		
		Sample Vendor/BS100147	Completed - 01/03/2019 02:17 PM	

### 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 Administering 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).

### Accepting/Rejecting Administration of Providers' Profile

To accept or reject the managing of specific providers:

## User Documentation for Vendors on EDISS Connect

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

Account Home **Manage Providers** Manage Processing Providers Transaction Catalog Contact Help

Welcome Sample Vendor [Logout >](#)

**Manage Providers**

Provider Name	NPI #	State	Your Role	Create Date	Status
John Doe <a href="#">View Profile &gt;</a>	1011111117	IA	Administrator	01/03/2019	Forms Required   Testing Required
Sample Provider2 <a href="#">View Profile &gt;</a>	1011111112	AZ	Administrator	12/04/2018	Forms Complete   Testing Required
Sample Provider 5 <a href="#">View Profile &gt;</a>	1011111115	AZ	Administrator	12/12/2018	Forms Complete   Testing Required
Sample Provider <a href="#">View Profile &gt;</a>	1011111111	IA	Processor	12/10/2018	Forms Complete   Testing Required
John Doe <a href="#">View Profile &gt;</a>	1011111117	AZ	Administrator	12/14/2018	Forms Complete   Testing Required
Example Provider <a href="#">View Profile &gt;</a>	1011111113	AZ	Administrator	12/18/2018	Forms Complete   Testing Required
Sample Provider <a href="#">View Profile &gt;</a>	1011111111	AZ	Processor	12/10/2018	Forms Complete   Testing Complete

**1** [Manage Providers >](#)  
[Manage Processing Providers >](#)

2. You may search by the provider's NPI or name.
3. Click **Accept** or **Reject**.



## User Documentation for Vendors on EDISS Connect

EDISS Connect

Account Home | Manage Providers | Manage Processing Providers | Transaction Catalog | Contact | Help

Manage Providers Sample Vendor Edit > | Logout >

Search by:

2 [Dropdown] [Search]

Provider Name	Registration NPI	Date Added	
Example Provider View Profile >	1011111113	01/03/2019	This user has 1 transactions (Click to add a new transaction)
John Doe View Profile >	1011111117	01/03/2019	This user has 2 transactions (Click to add a new transaction)
Sample Provider 5 View Profile >	1011111115		3 <span>Accept</span>   <span>Reject</span>

### Manage Transactions

Manage Provider 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.

EDISS Connect

Account Home | **Manage Providers** | Manage Processing Providers | Transaction Catalog | Contact | Help

Manage Providers Sample Vendor Edit > | Logout >

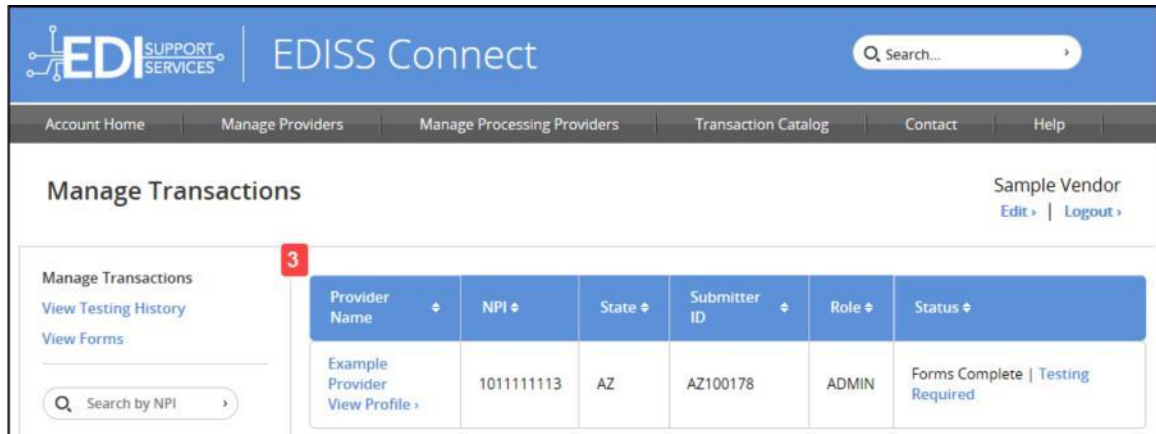
Search by:

2 [Dropdown] [Search]

Provider Name	Registration NPI	Date Added	
1 Example Provider View Profile >	1011111113	01/03/2019	This user has 1 transactions (Click to add a new transaction)
John Doe View Profile >	1011111117	01/03/2019	This user has 2 transactions (Click to add a new transaction)

## User Documentation for Vendors on EDISS Connect

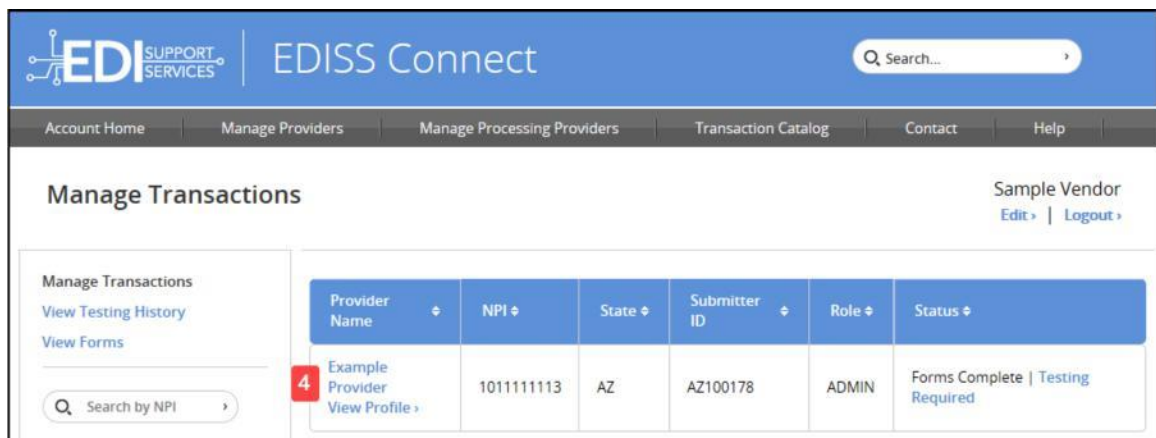
- The following screen displays the provider's name, NPI, stated, Submitter ID if generated, role (administrator or processor), forms status and testing status.



The screenshot shows the EDISS Connect interface. The top navigation bar includes 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. The main content area is titled 'Manage Transactions' and features a search bar for NPI. A table lists provider information with columns: Provider Name, NPI, State, Submitter ID, Role, and Status. A red box with the number '3' highlights the 'Provider Name' column header.

Provider Name	NPI	State	Submitter ID	Role	Status
Example Provider <a href="#">View Profile &gt;</a>	1011111113	AZ	AZ100178	ADMIN	Forms Complete   Testing Required

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



The screenshot shows the EDISS Connect interface. The top navigation bar includes 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. The main content area is titled 'Manage Transactions' and features a search bar for NPI. A table lists provider information with columns: Provider Name, NPI, State, Submitter ID, Role, and Status. A red box with the number '4' highlights the 'Example Provider' link in the table.

Provider Name	NPI	State	Submitter ID	Role	Status
<a href="#">Example Provider View Profile &gt;</a>	1011111113	AZ	AZ100178	ADMIN	Forms Complete   Testing Required

- 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 on **Account Info**.
- You can edit or add a 9-digit numeric Tax ID, SSN, or EIN associated with an NPI.
- The **Status** shows forms required or testing required at a glance for the NPI.

## User Documentation for Vendors on EDISS Connect

**Note:** If *Forms Required* is displayed, the provider must accept the required form(s) by logging into their EDISS 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).

The screenshot displays the EDISS Connect interface. At the top, there is a navigation bar with the EDI Support Services logo and the text 'EDISS Connect'. Below this is a secondary navigation bar with links for 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. The main content area is titled 'Manage Transactions' and includes a 'Sample Vendor' link with 'Edit' and 'Logout' options. On the left, a sidebar contains links for 'Manage Transactions' (highlighted with a red box and number 5), 'View Testing History', 'View Forms', 'Account Info', and 'View FAQs'. The main area features a table with columns for 'Provider Name', 'NPI# (Click to manage)', 'Submitter ID', 'State', and 'Status' (highlighted with a red box and number 7). The first row shows 'Example Provider' with NPI# 1011111113, Submitter ID AZ100178, State AZ, and Status 'Forms Complete | Testing Required'. Below the table, there is a 'Tax ID or SSN: 999999999 | edit' field (highlighted with a red box and number 6) and a 'Billing Group:' section. The 'Add Another Line of Business' section contains two entries: 'Medicare Part B | delete' with a 'Transaction Manager/ID' and 'Status' of 'COMPLETED - Auto Approved - 12/18/2018 04:54 PM', and '837P (5010X222) Health Care Claim: Professional | delete' with a 'Transaction Manager/ID' of 'Sample Vendor/BS100147 | delete' and 'Status' of 'Testing Required'. Each entry has an 'Add Vendor' button. At the bottom, there is a link for 'Add Another Transaction (within this line of business)' and another 'Add Another State' link.

8. 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*.

## ***User Documentation for Vendors on EDISS Connect***

9. 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 on **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.*

10. If a **Testing Required** link is shown, you can click on the link to upload test files into the EDISS 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.*

## User Documentation for Vendors on EDISS Connect

The screenshot shows the 'Manage Transactions' page in the EDISS Connect system. The page header includes the EDI Support Services logo and the text 'EDISS Connect'. A search bar is located in the top right corner. The main navigation bar contains links for 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. The page title is 'Manage Transactions', and there are links for 'Sample Vendor', 'Edit', and 'Logout'.

The main content area is divided into a left sidebar and a main panel. The sidebar contains links for 'Manage Transactions', 'View Testing History', 'View Forms', 'Account Info', and 'View FAQs'. The main panel has a header 'Add Another State >' and a table of transactions. The table has columns for 'Provider Name', 'NPI# (Click to manage)', 'Submitter ID', 'State', and 'Status'. The first row is for 'Example Provider' with NPI# 1011111113, Submitter ID AZ100178, State AZ, and Status 'Forms Complete | Testing Required'. Below the table, there is a section for 'Add Another Line of Business >' with a 'Billing Group:' label. The first line of business is 'Medicare Part B | delete' with a 'Transaction Manager/ID' and a 'Status' of 'COMPLETED - Auto Approved - 12/18/2018 04:54 PM'. Below this, there are two transactions for '837P (5010X222) Health Care Claim: Professional | delete'. The first transaction has a checkbox for 'I will and/or' and a status of 'Testing Required'. The second transaction has a checkbox for 'I will and/or' and a status of 'Completed - 01/03/2019 02:27 PM'. There are 'Add Vendor >' buttons for each transaction. A red box with the number '10' is placed over the 'Testing Required' status. A red box with the number '8' is placed over the 'Medicare Part B' transaction, and a red box with the number '9' is placed over the 'Health Care Claim: Professional' transaction. At the bottom of the main panel, there is a link for '+ Add Another Transaction > (within this line of business)'. Below the main panel, there is a link for 'Add Another State >'.

11. 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.

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

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

## User Documentation for Vendors on EDISS Connect

The screenshot displays the 'Manage Transactions' interface. At the top, there is a navigation bar with 'Account Home', 'Manage Providers', 'Manage Processing Providers', 'Transaction Catalog', 'Contact', and 'Help'. A search bar is located on the right. The main content area is titled 'Manage Transactions' and includes a sidebar with links like 'View Testing History', 'View Forms', 'Account Info', and 'View FAQs'. The main area shows a table of transactions with the following data:

Provider Name	NPI# (Click to manage)	Submitter ID	State	Status
Example Provider <a href="#">View Profile</a>	1011111113   <a href="#">delete</a>	AZ100178	AZ	Forms Complete   <a href="#">Testing Required</a>
Tax ID or SSN: [ ]   <a href="#">edit</a>		Billing Group:		
<a href="#">Add Another Line of Business</a>				
Medicare Part B   <a href="#">delete</a>	Transaction Manager/ID		Status COMPLETED - Auto Approved - 12/18/2018 04:54 PM	
837P (5010X222) Health Care Claim: Professional   <a href="#">delete</a>	<input type="checkbox"/> I will and/or		Sample Vendor/BS100147   <a href="#">delete</a> <a href="#">Testing Required</a>	
		<a href="#">Add Vendor</a>		
835 (5010X221) Health Care Claim Payment/Advice   <a href="#">delete</a>	<input type="checkbox"/> I will and/or		Sample Vendor/BS100147   <a href="#">delete</a> <a href="#">Completed - 01/03/2019 02:27 PM</a>	
		<a href="#">Add Vendor</a>		
<a href="#">+ Add Another Transaction</a> (within this line of business)				
<a href="#">Add Another State</a>				

**Note:** The 837 transactions allow up to 2 submission methods, except for North Dakota Medicaid, as they can only have 1 selected. All other transactions allow only 1 submission/retrieval method.