EDI Support Services

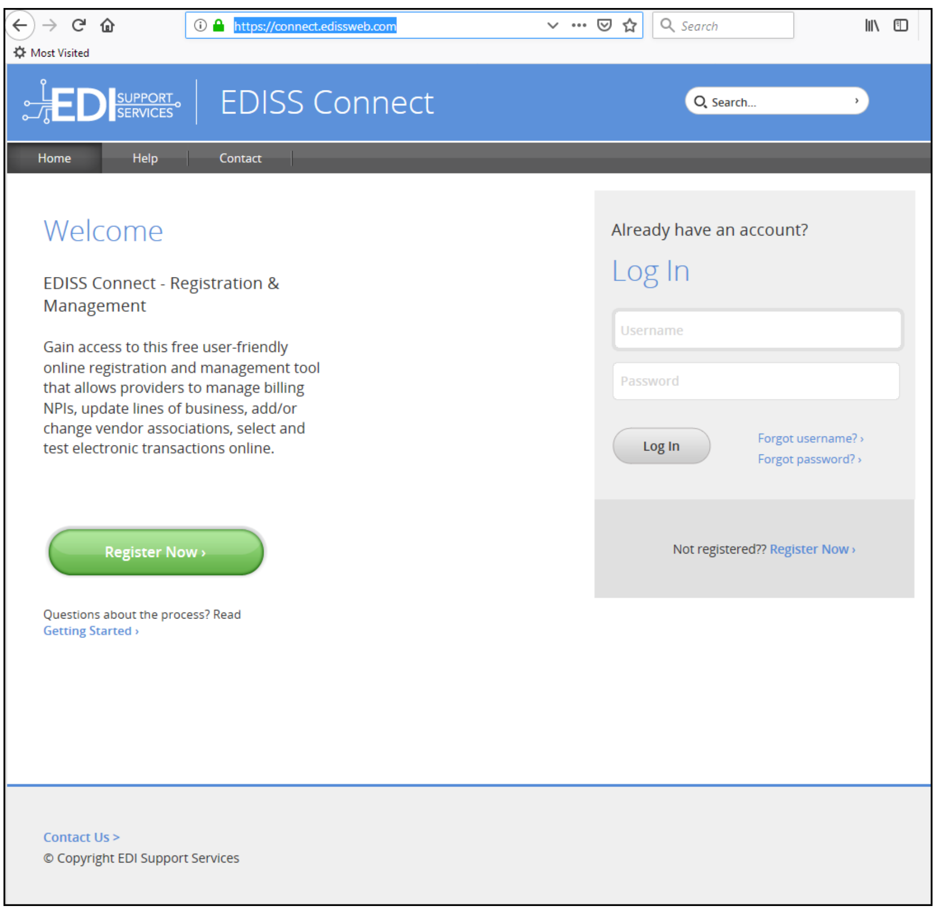
User Documentation: EDISS Connect User Manual for Providers

EDISS Connect is a user-friendly, online registration and electronic claim testing system. Providers use it to register with EDISS, to add users and to add or manage transaction types. The system also allows Providers to test claim files for electronic submission for Non-Medicare lines of business.

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:

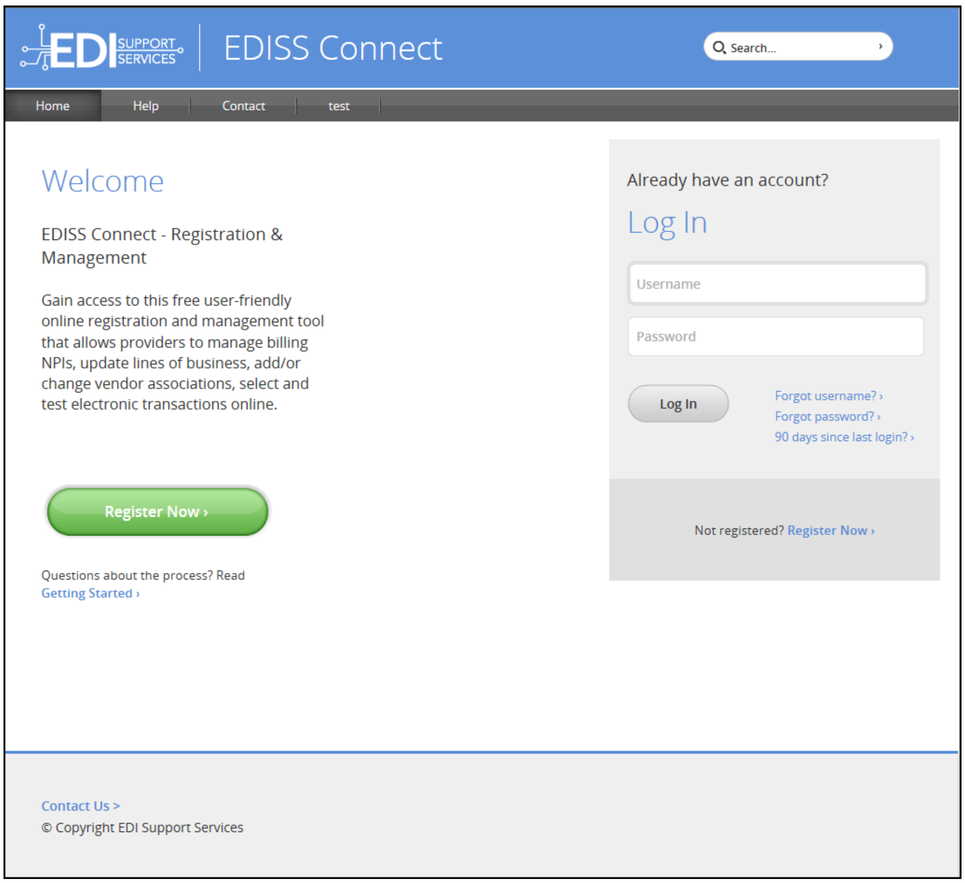
EDISS Connect User Manual for Providers

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.*

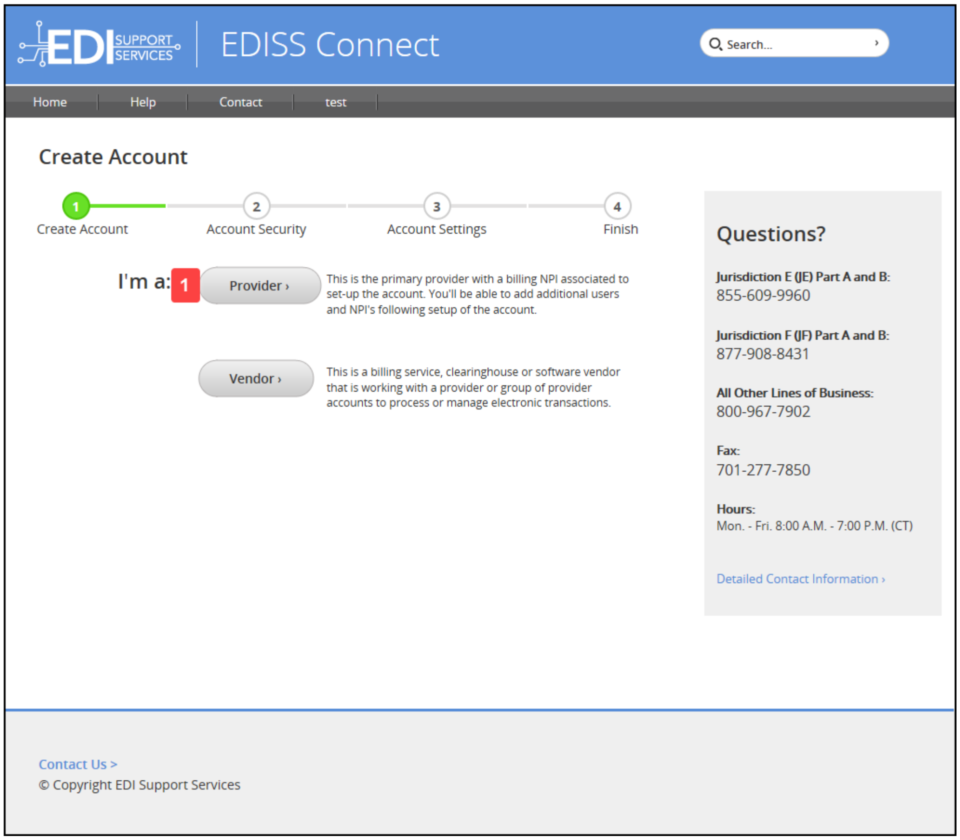
1. Click on the green **Register Now** button to create an online account for accessing online profile information and adding and managing transactions.



Create Account

1. First, select Provider. 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.*



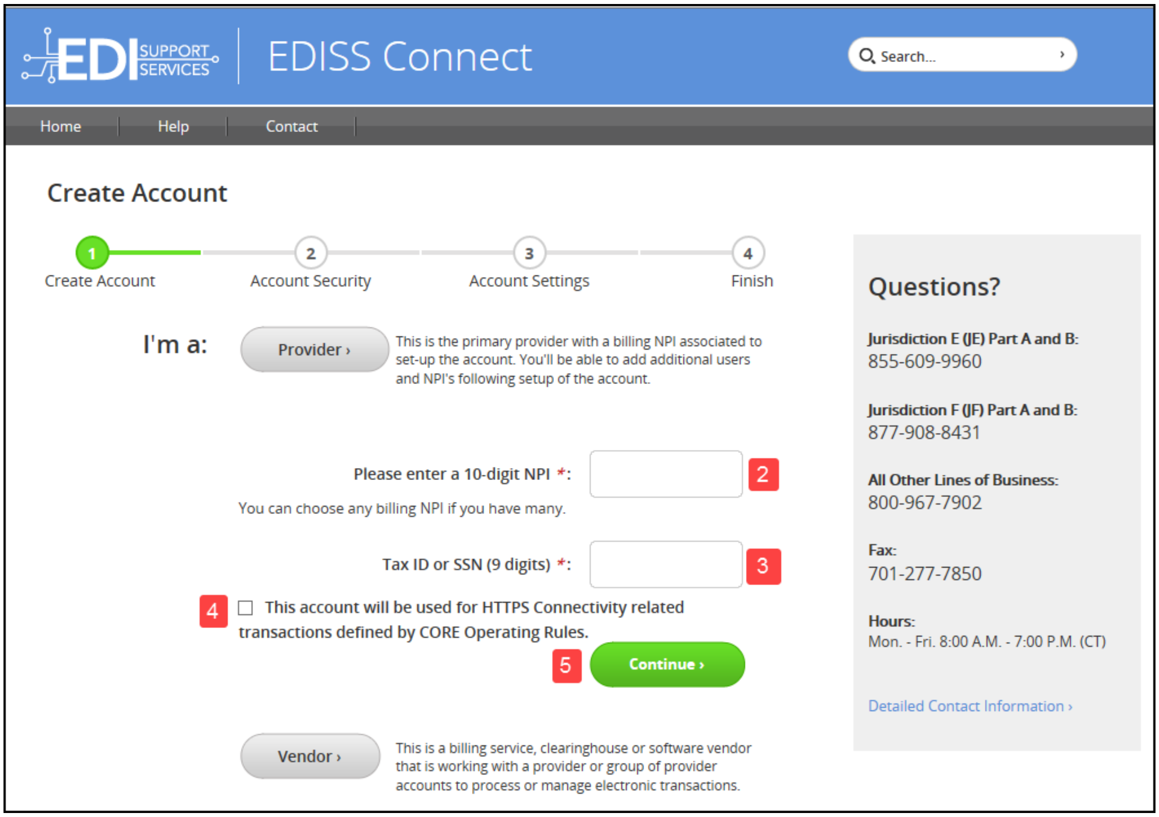
2. If you are registering as a Provider, you must provide your 10-digit billing/group NPI (National Provider Identification) number. You can choose any billing NPI to register at this point. If you have others, you will be allowed to enter additional NPI numbers for transactions once the initial registration is complete.

Note: *Rendering NPIs are not required to be registered and will be removed.*

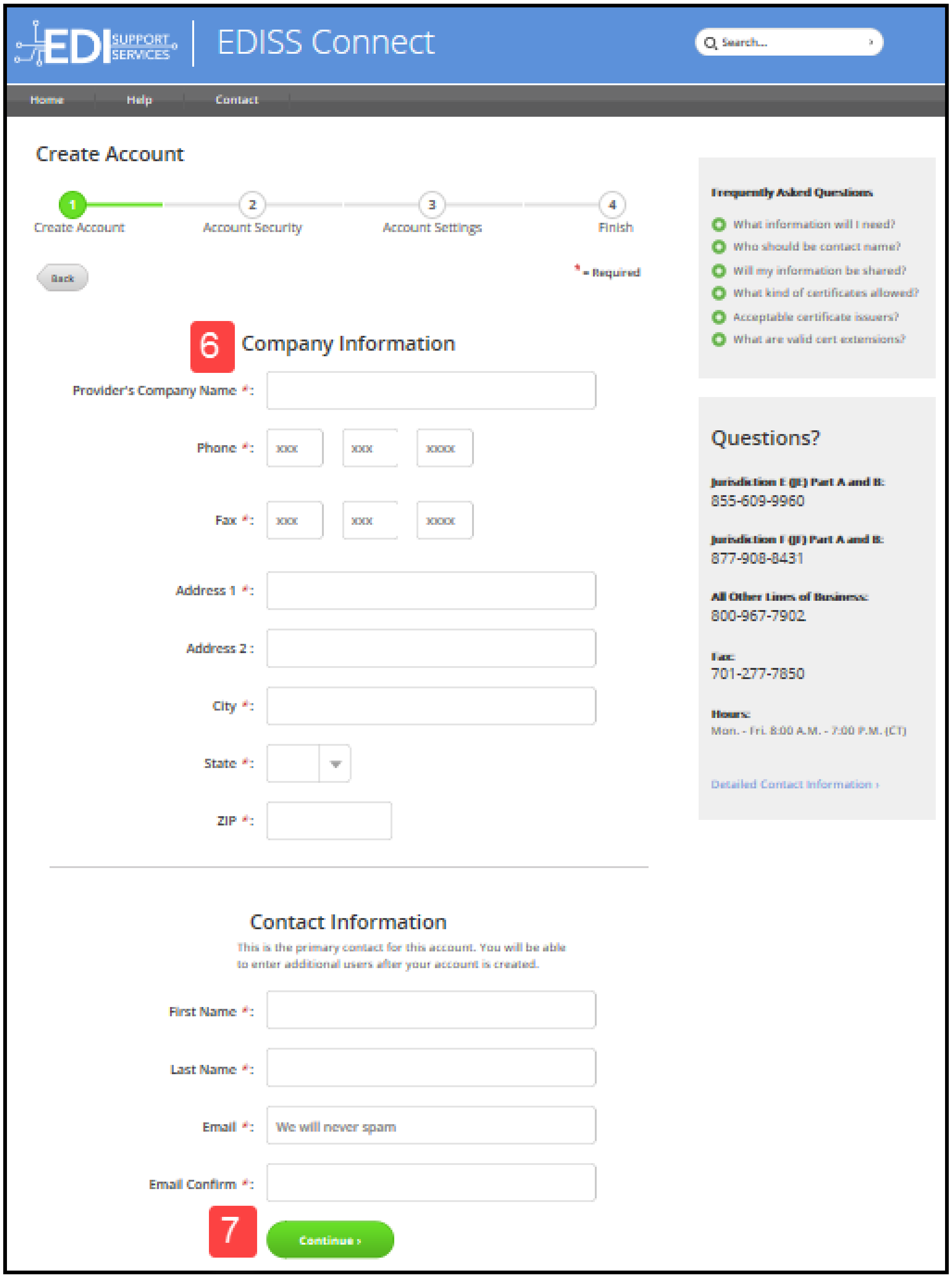
3. Add your 9-digit tax ID or Social Security Number associated with the NPI.

4. 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 can be found at https://www.caqh.org/core/operating-rules.

5. Click **Continue**.



6. 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.
7. Click **Continue.**



Account Security

1. Choose a username for your account. This 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.

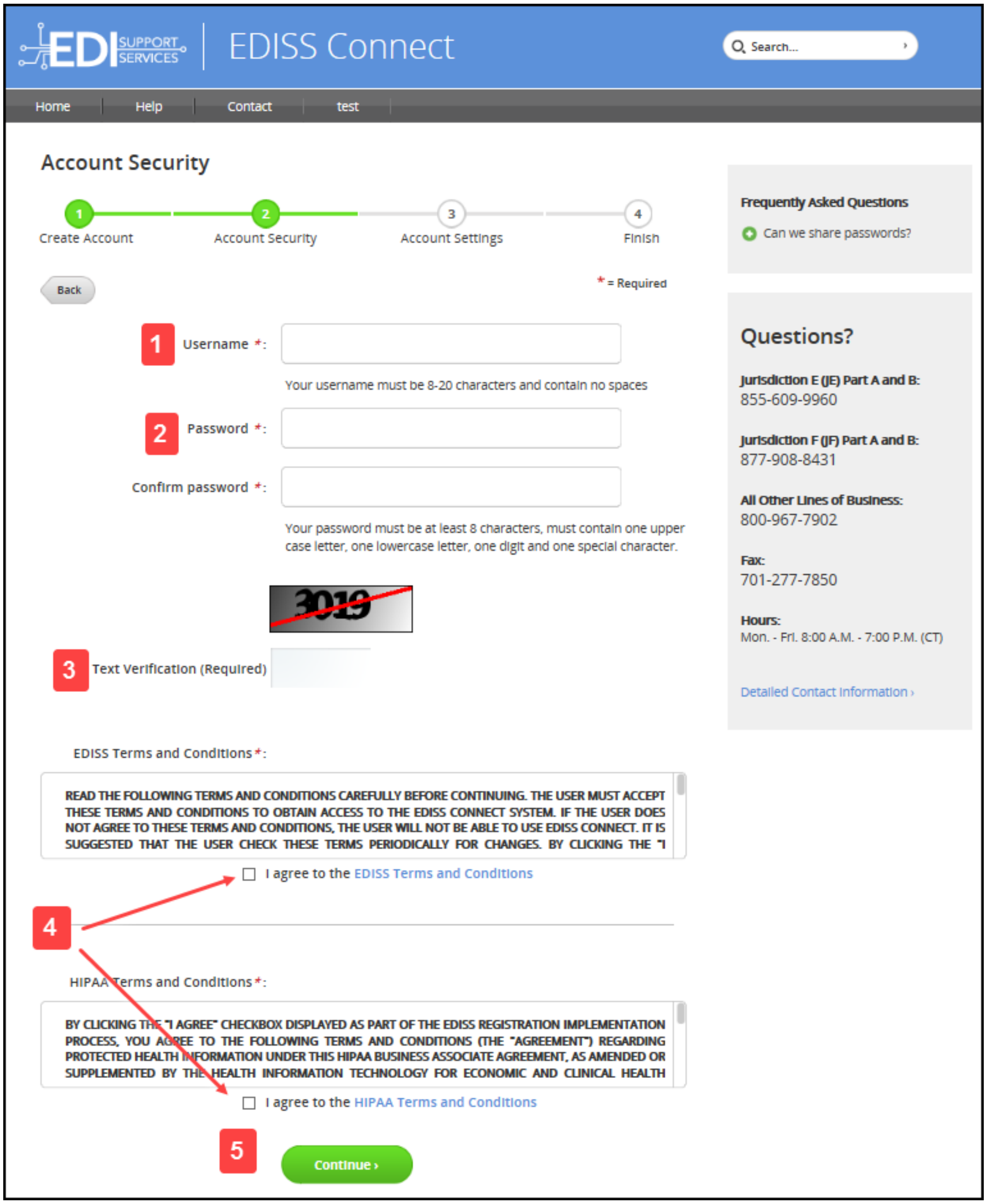
4. Additionally, you will need to agree to EDISS Terms and Conditions as well as HIPAA Terms and Conditions before you will be allowed to continue with your registration.

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 – Select State(s)

1. At any time during the registration process, you can go back to the previous step by clicking **Back**. However, if you have not yet clicked **Continue** on this page, your information will be lost.

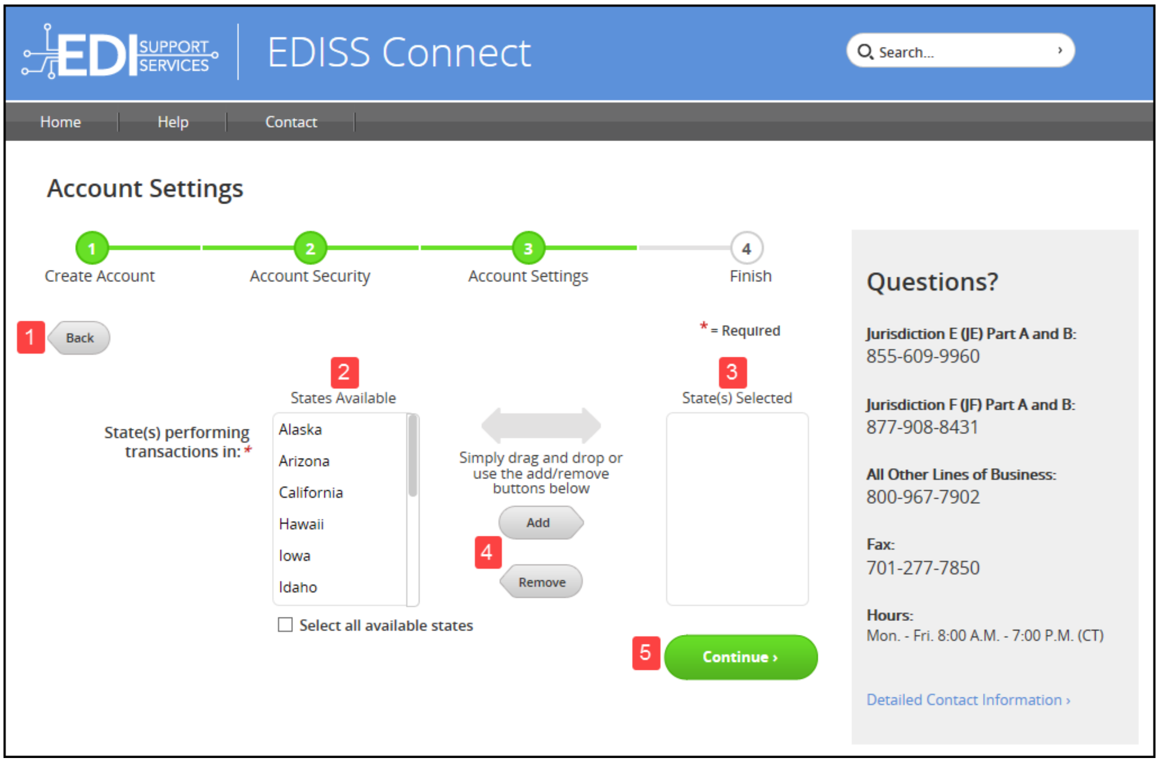
2. The left column will show all states that EDISS conducts business with. To select your state(s), highlight the state and click **Add**.

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

4. 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.*

5. Once all states have been selected, click **Continue**.

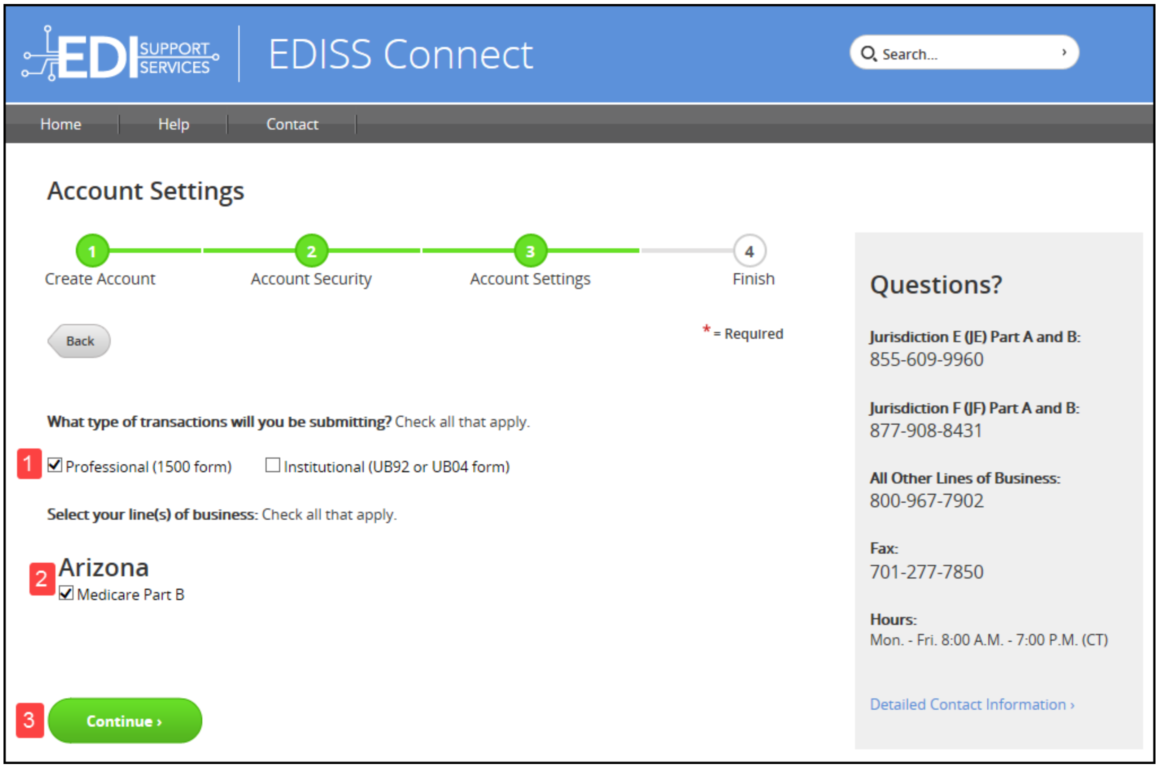


Account Settings – Line(s) of Business

1. Check all options (Professional, Institutional and/or Dental) that apply.

2. Check all the specific transactions that apply to your NPI(s). The states will display from the previous step.

3. When all lines of business have been selected, click **Continue.**



Account Settings – Account Management

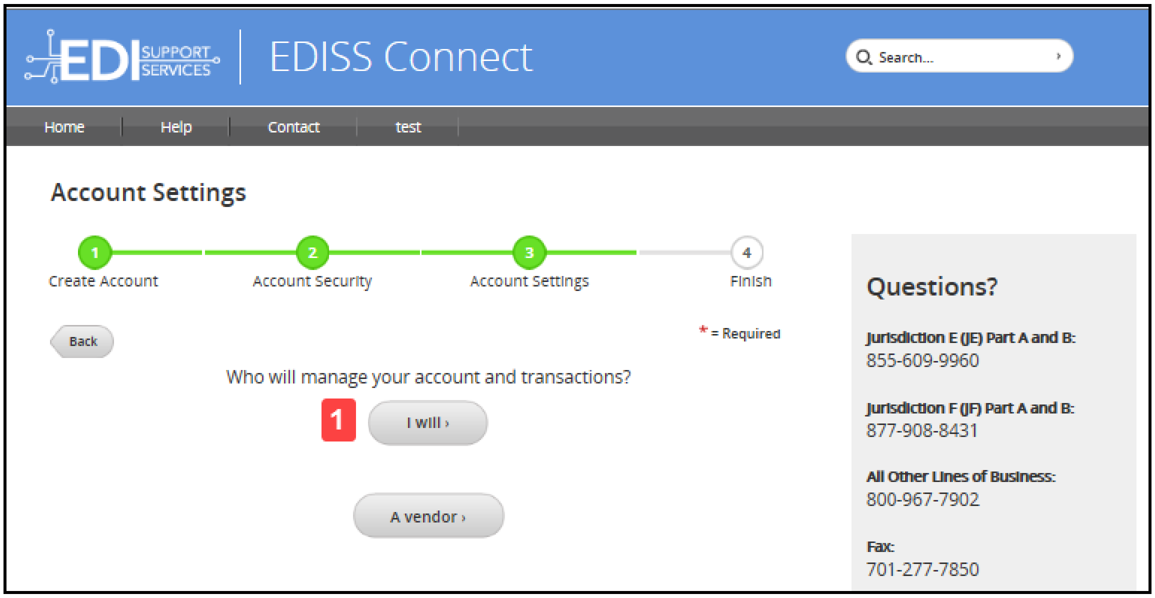
For **Account Settings**, you must choose who will administer your account.

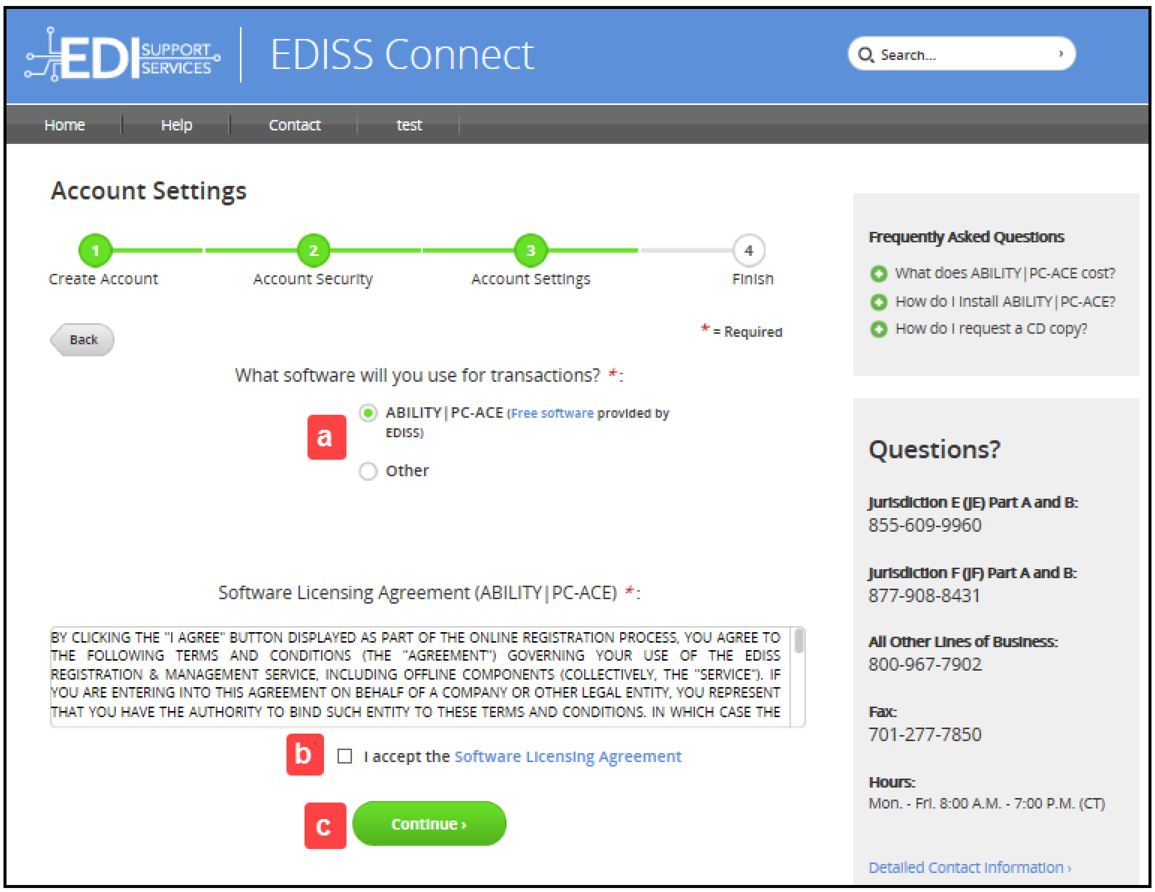
1. If you choose **I will**, you will maintain control of all your account information and will setup all the transactions that you will be submitting.

    a. If you will be administering your own account, you are required to choose what software you will use to process transactions.

    b. If you use ABILITY|PC-ACE, the free software provided by EDISS, you will need to accept the associated Software Licensing Agreement.

    c. Once complete, click **Continue**.



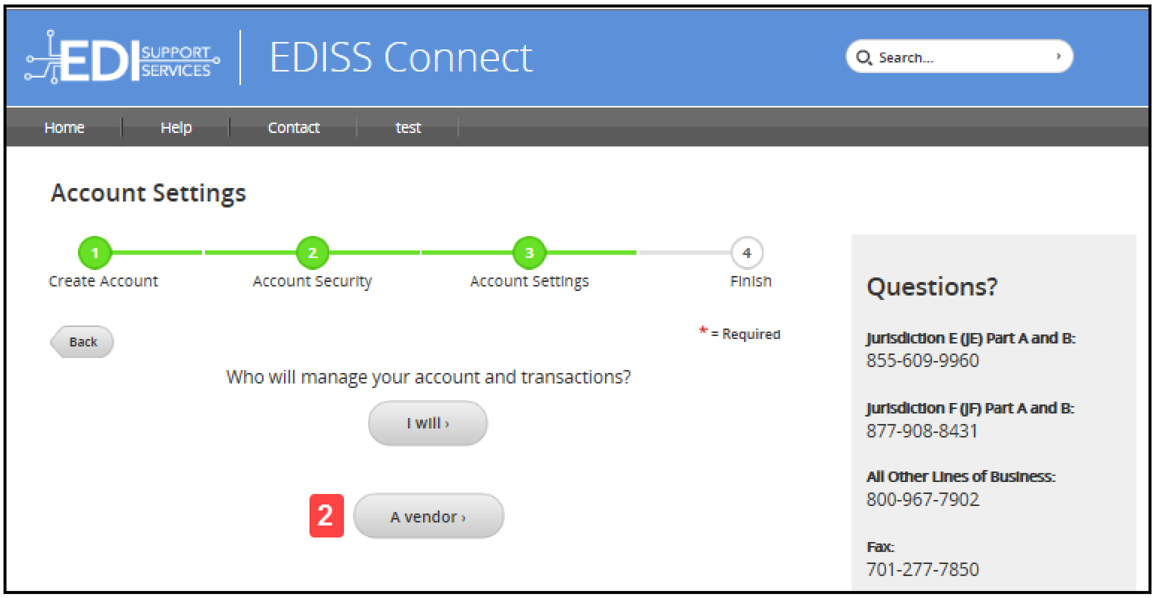


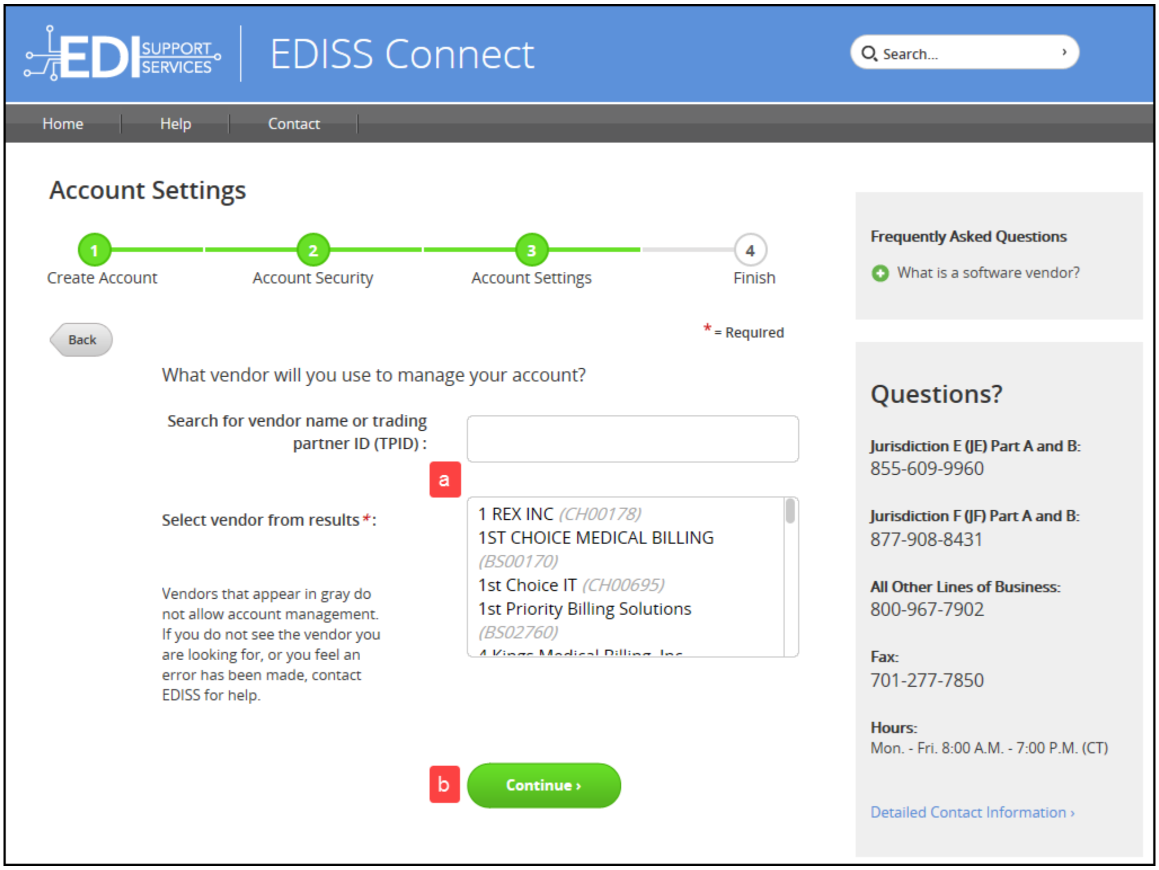
2. If you choose **A vendor**, control of your account will be released to a managing vendor (once the vendor approves the assignment) and you will not be able to change any information, add or manage transactions as it relates to your account.

Note: *At any time, a Provider can switch their control back to themselves in Account Settings.*

a. If you chose **A vendor** in the Account Settings question to administer your account, you can choose a vendor by searching here. Only vendors that accept managing vendor responsibilities are available in the search results.

b. Once you have chosen a vendor, click **Continue**.

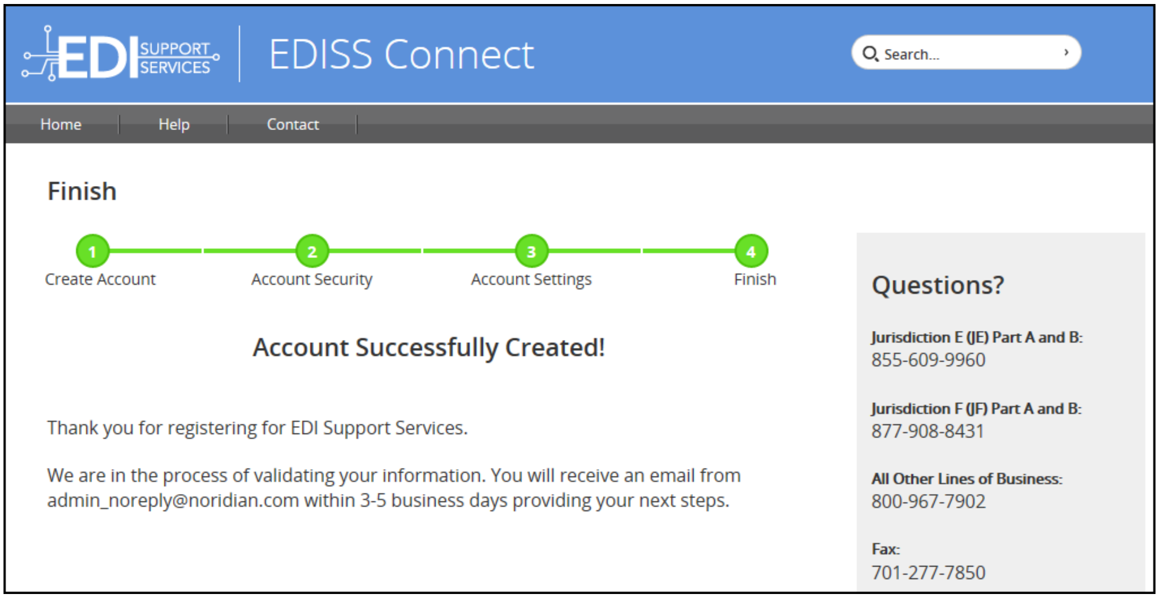




Important Note: *Once the Vendor Administrator has added transactions to the provider account, the provider must accept the required form(s) by logging into their Connect profile. Transactions will not be moved into production until the provider has accepted the required form(s).*

Finish – Please Wait

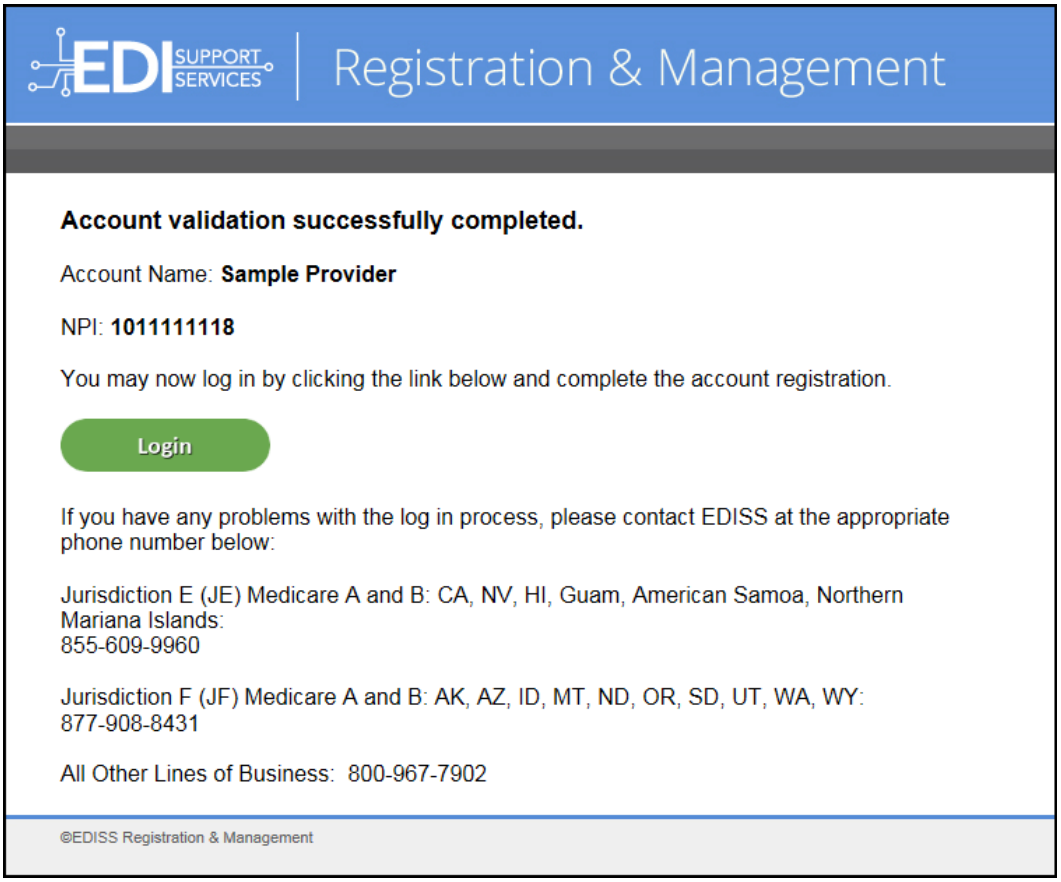
Your EDISS Connect account has been created. Please wait while your provider information is verified. When done, you will receive an email from admin_noreply@noridian.com within 3-5 business days with your next steps.



Account Validation

If your provider information has been verified by EDISS, you will receive an email from admin_noreply@noridian.com within 3-5 business days with a link to log into your EDISS Connect account. Click this Login link to complete your account registration.

Note: If your information was not able to be verified, the email will contain the reason and possible suggestions on your next steps.



EDI SUPPORT SERVICES | Registration & Management

Account validation successfully completed.

Account Name: **Sample Provider**

NPI: **1011111118**

You may now log in by clicking the link below and complete the account registration.

Login

If you have any problems with the log in process, please contact EDISS at the appropriate phone number below:

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

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

All Other Lines of Business: 800-967-7902

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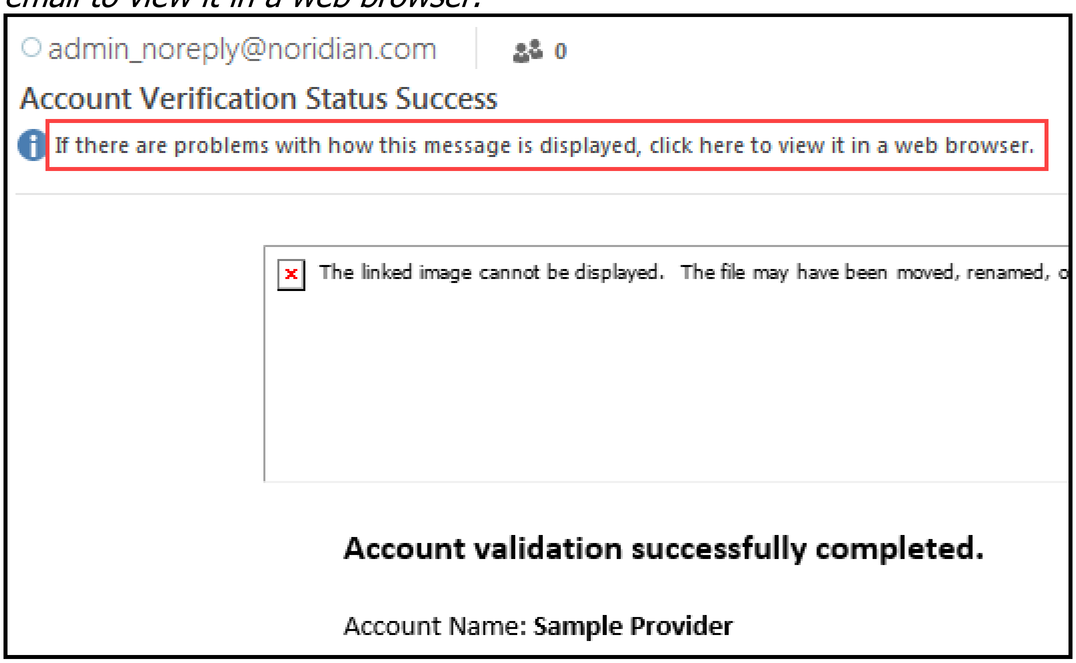
Note: *If you are unable to view the Login image, click the message within the email to view it in a web browser.*



admin_noreply@noridian.com 0

Account Verification Status Success

If there are problems with how this message is displayed, click here to view it in a web browser.

The linked image cannot be displayed. The file may have been moved, renamed, o

Account validation successfully completed.

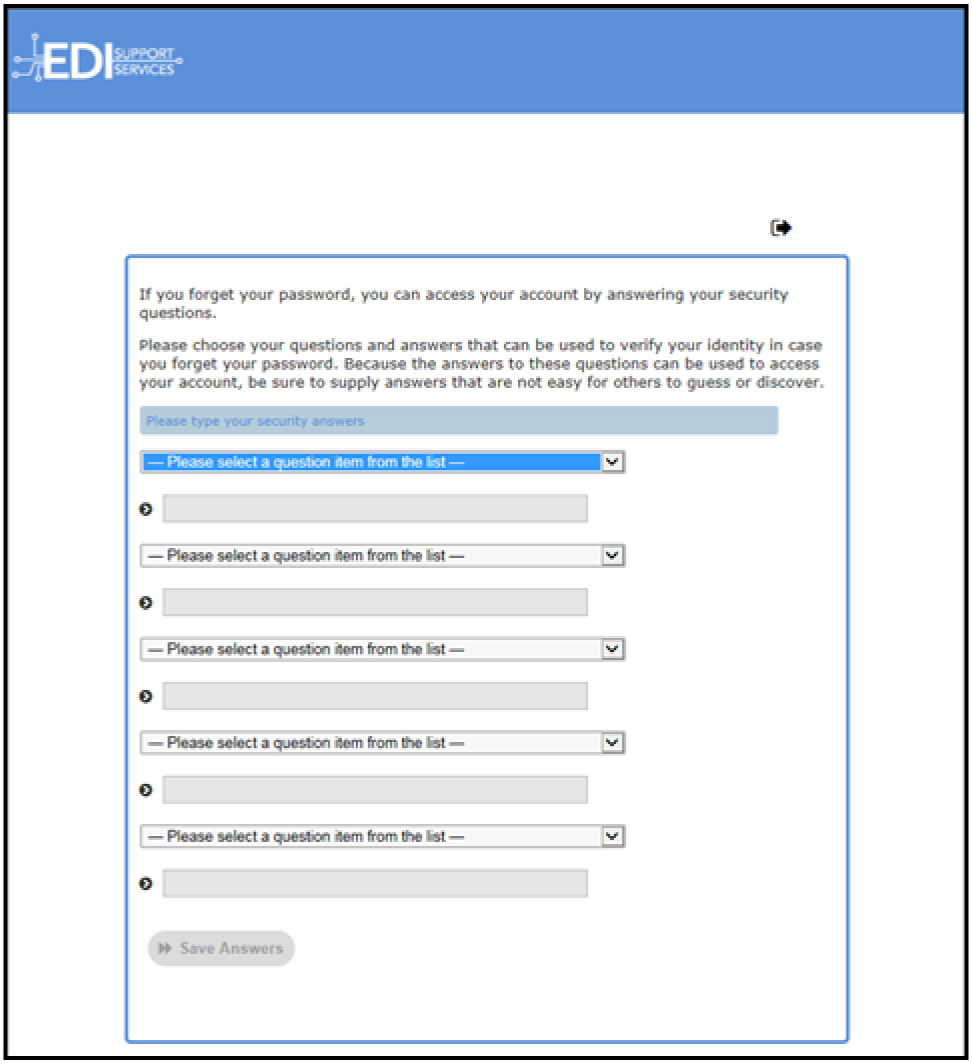
Account Name: **Sample Provider**

Answer Security Questions

To complete the user registration once logged into your EDISS Connect account, 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.
    - Answers to security questions 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**.

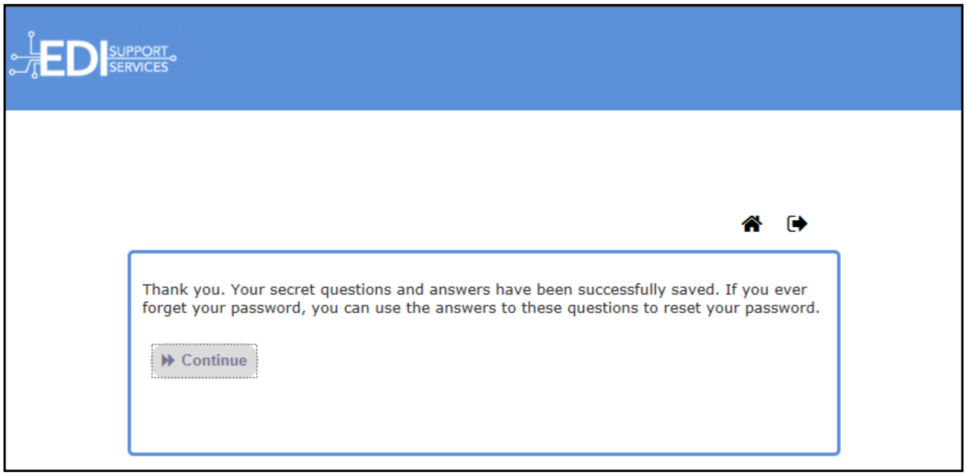


3. After clicking **Save Answers**, you will be taken to a screen where all five security questions, along with answers, are displayed. EDISS strongly recommends that you print this page for future reference and distribute to any staff who will be accessing the account.

Note: *When viewing security questions and answers, if there are any corrections that need to be made, click on* ***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 Provider Dashboard.



Provider Dashboard and Managing Transactions

Provider Dashboard

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

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

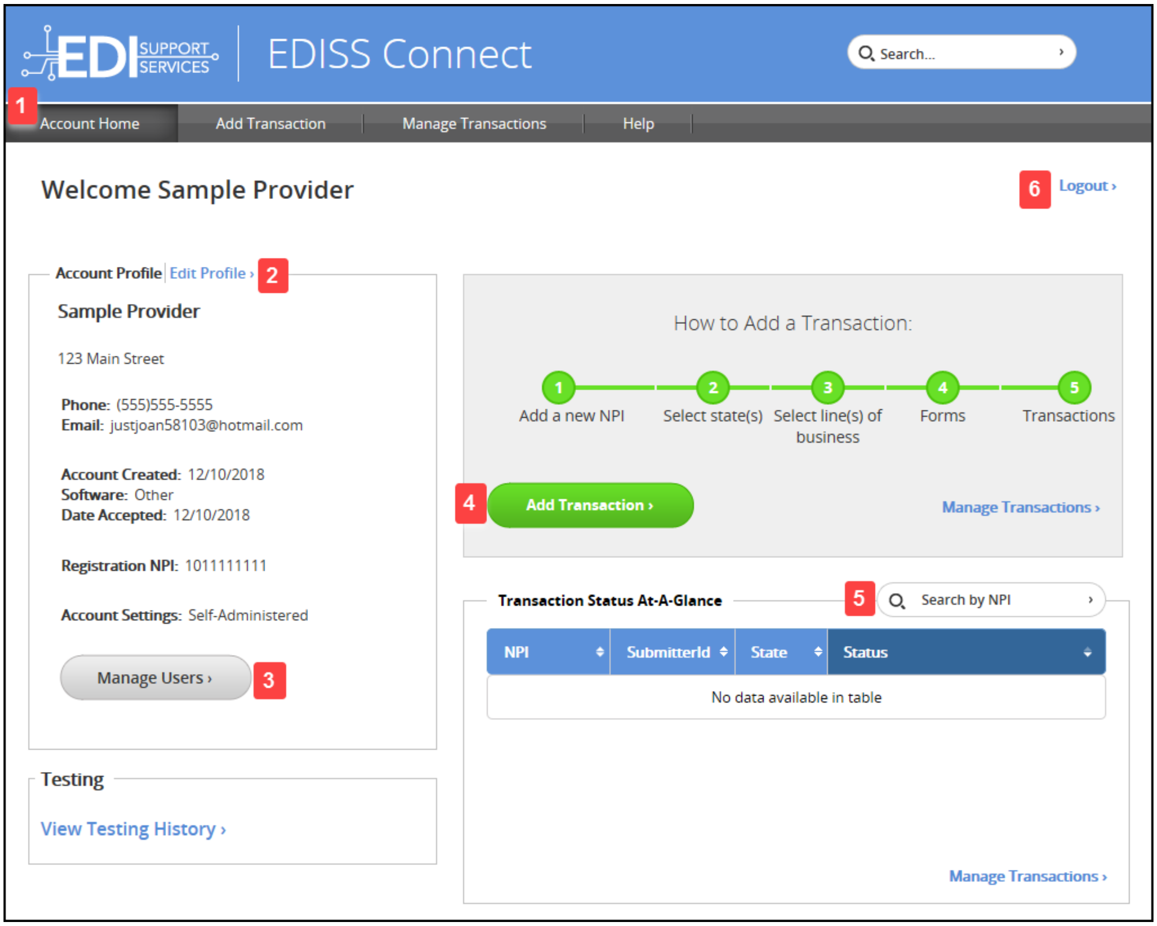
3. At any point you can add, edit or remove users that have access to your account by clicking **Manage Users**.

4. To add a transaction, click **Add Transaction**. EDISS Connect will take you through an easy-to-follow four-step process.

5. The Transaction Status-At-A-Glance module allows you to see which transactions you have setup that require the most actions by status. It will let you know what actions are required to complete each NPI (such as forms or testing). To make it easier, you are able to search by NPI in this window to quickly filter results to the top of this module.

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

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



Edit Profile

1. Clicking **Security Settings** will allow you to change your password.

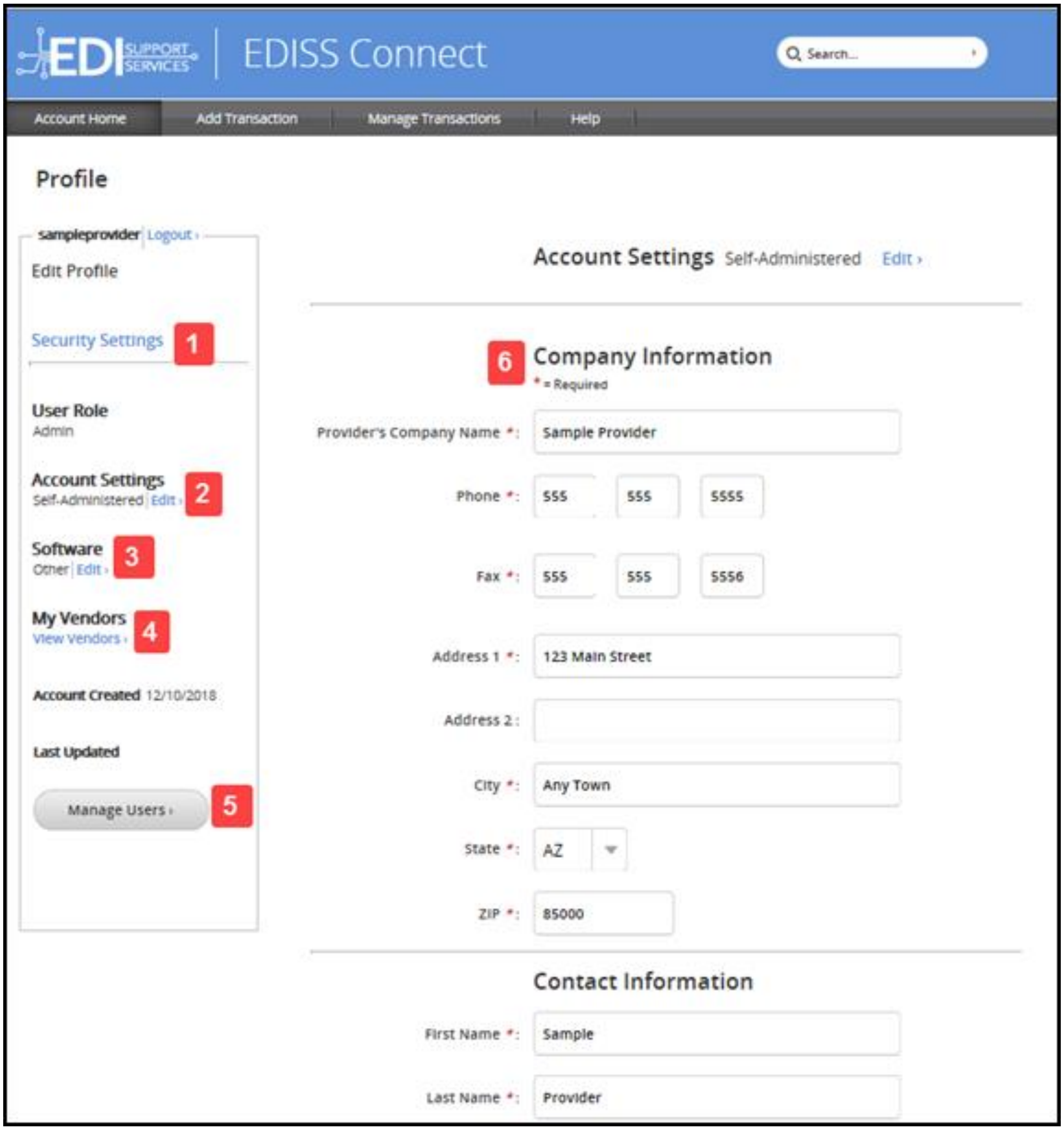
2. Account Settings can be set to either Self-Administered if you want full control of your account or Vendor-Administered if a vendor will manage all aspects of your account for you.

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

4. My Vendors displays a list of vendors you are using for processing transactions. This page will display all vendors and respective lines of business you have selected for each vendor to submit on your behalf.

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

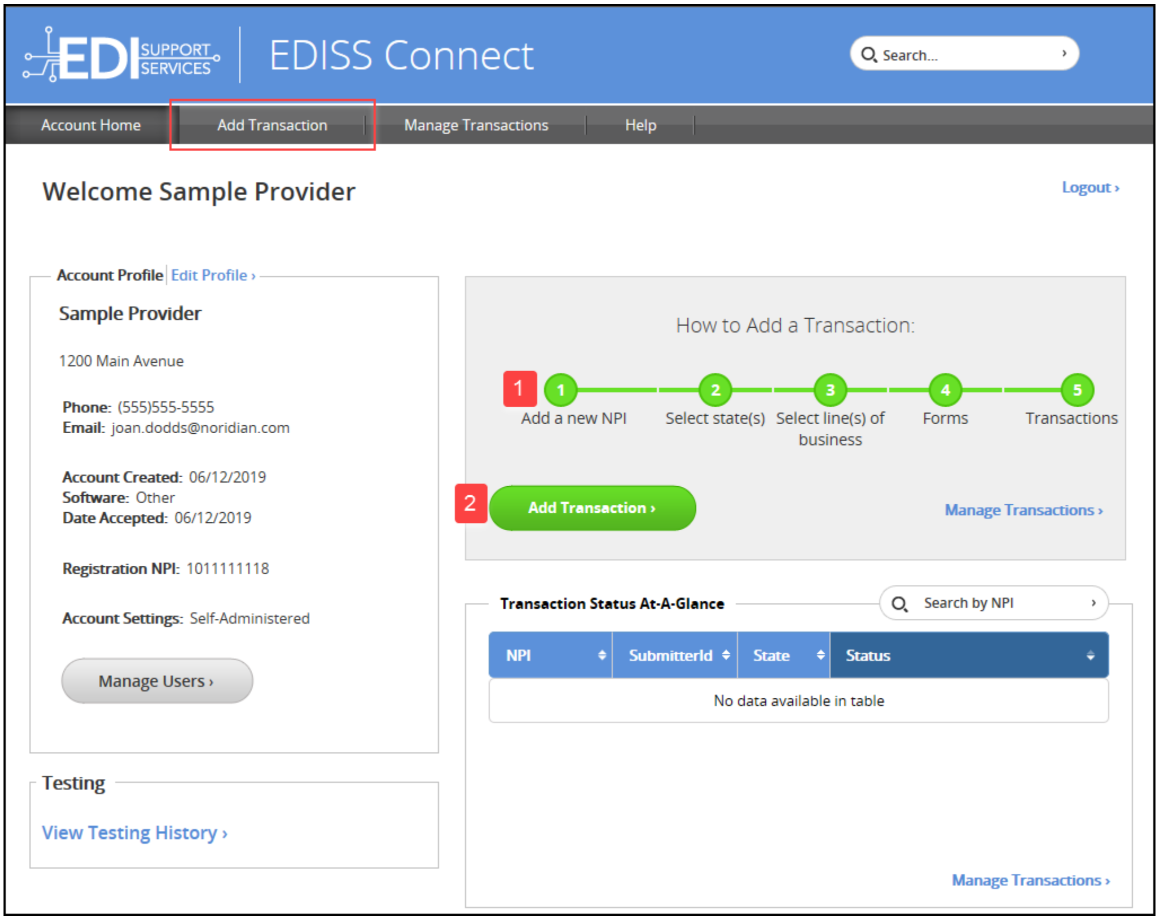
6. At any time you can update your company information and save it to your profile.



Adding a Transaction

Add Transactions – Add NPI and Tax ID

1. This bar will track your progress through the four steps while you are setting up a transaction.
2. By selecting **Add Transaction** on the main navigation bar, or in your main account page, you can add transactions to your EDISS Connect account.



3. Enter a 10-digit billing or group NPI number.

4. Enter the associated Tax ID, EIN or SSN.

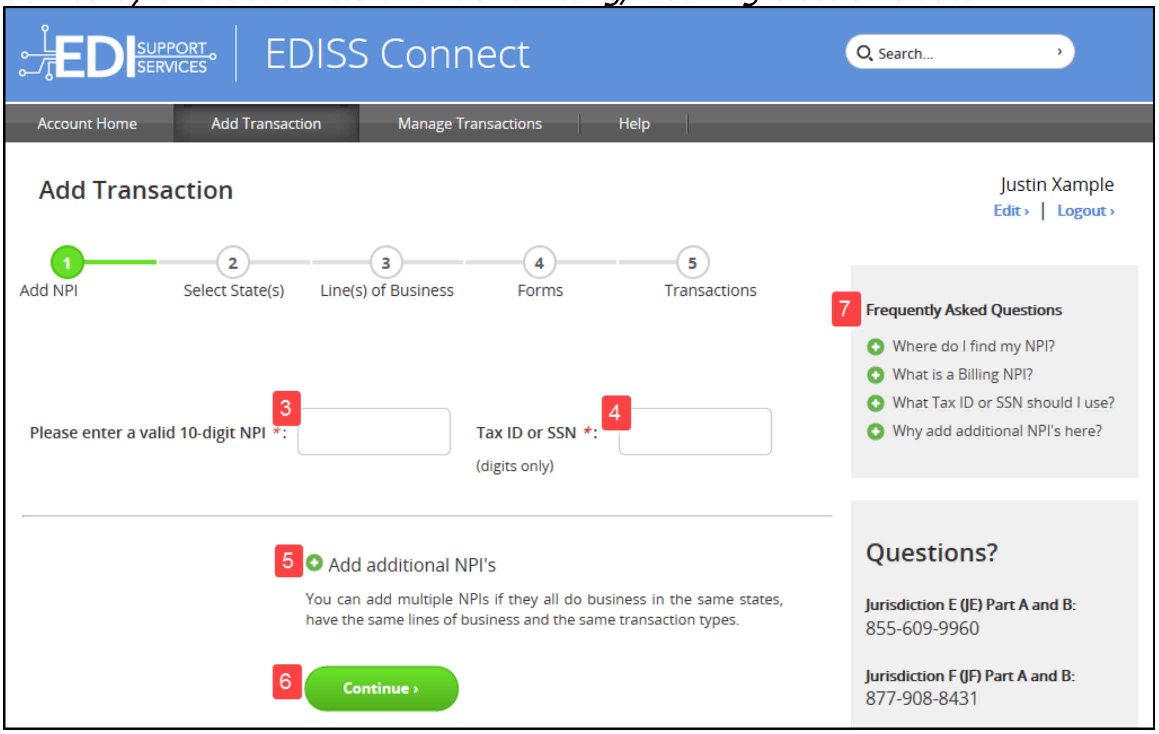
5. You can click on the (+) next to Add additional NPIs, but they must be for the same states, lines of business and transaction types.

6. Once the NPI and Tax ID or SSN are complete, you will be allowed to click Continue.

7. **Frequently Asked Questions** are a quick reference that answer questions specific to the step/page you are on.

Note: *For all other NPIs that need to be added to the account, you will select* ***Add Transaction.***

Note: *If multiple NPIs are added to a single account profile, a billing group number will be assigned to that account. This billing group number would be utilized by direct submitters for transmitting/receiving electronic data.*



Add Transactions – Select State(s)

1. At any time during the Add Transaction process, you can go back to the previous step by clicking **Back**. However, if you have not yet clicked **Continue** on this page, your information will be lost.

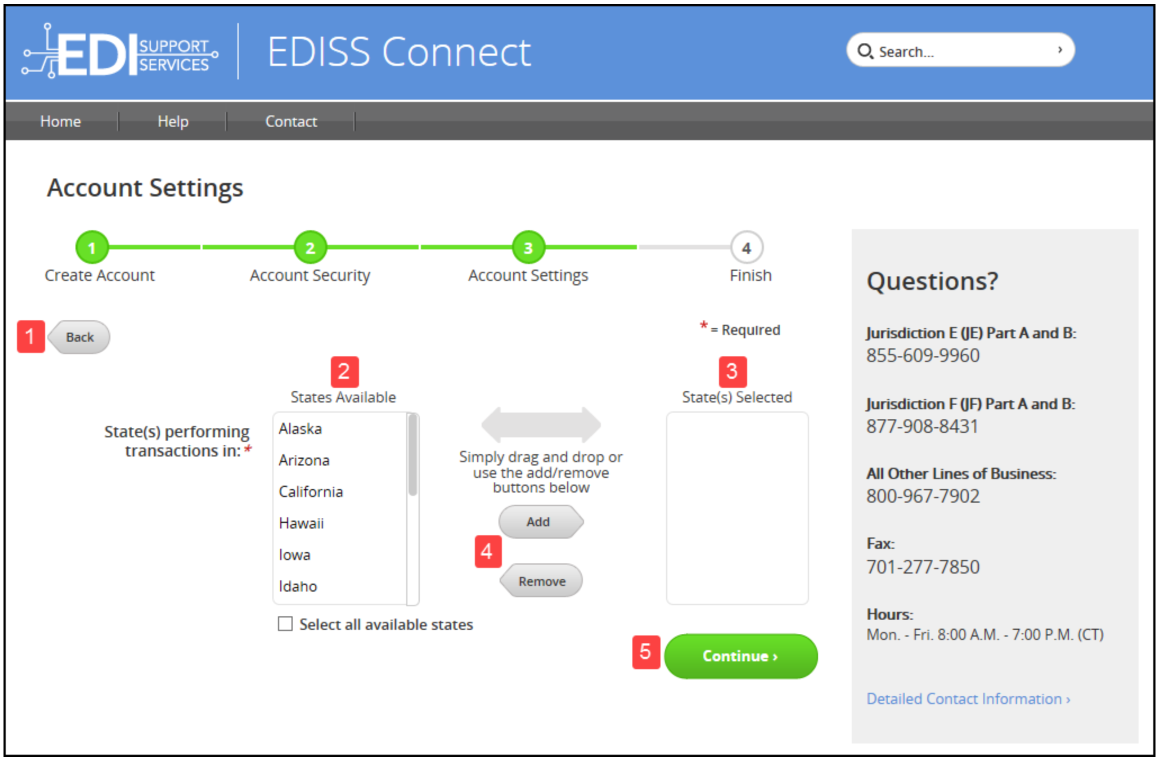
2. The left column will show all states that EDISS conducts business with. To select your state(s), highlight the state and click **Add**.

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

4. 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.*

5. Once all states have been selected, click **Continue**.

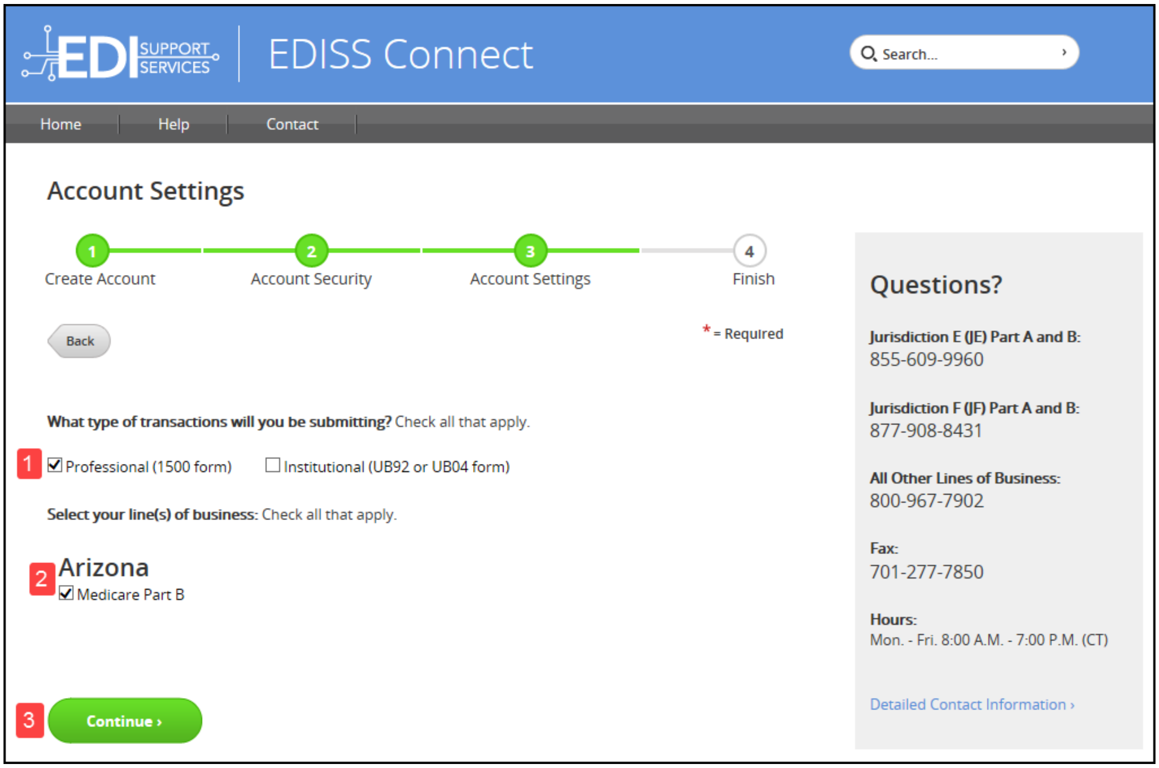


Add Transactions – Line(s) of Business

1. Check all options (Professional, Institutional and/or Dental) that apply.

2. Check all the specific transactions that apply to your NPI(s). The states will display from the previous step.

3. When all lines of business have been selected, click **Continue.**



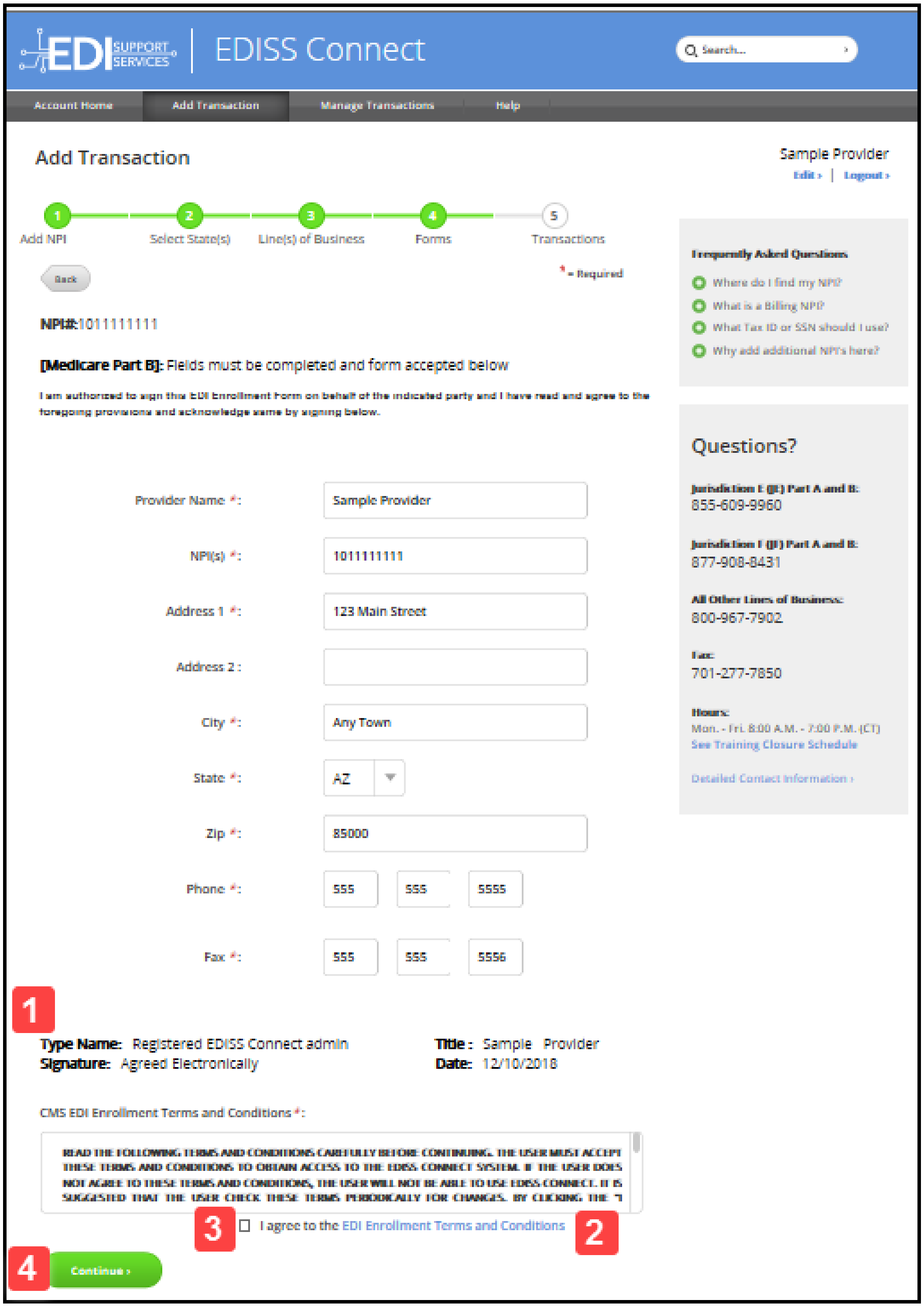
Add Transactions – Enrollment Forms

1. The EDI Enrollment Form will be agreed to electronically.

2. To view the EDI Enrollment Form, click the **EDI Enrollment Terms and Conditions** link.

3. To accept the EDI Enrollment Form, check the **I agree to the EDI Enrollment Terms and Conditions** box.

4. Click **Continue**.



Add Transactions – Transactions

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

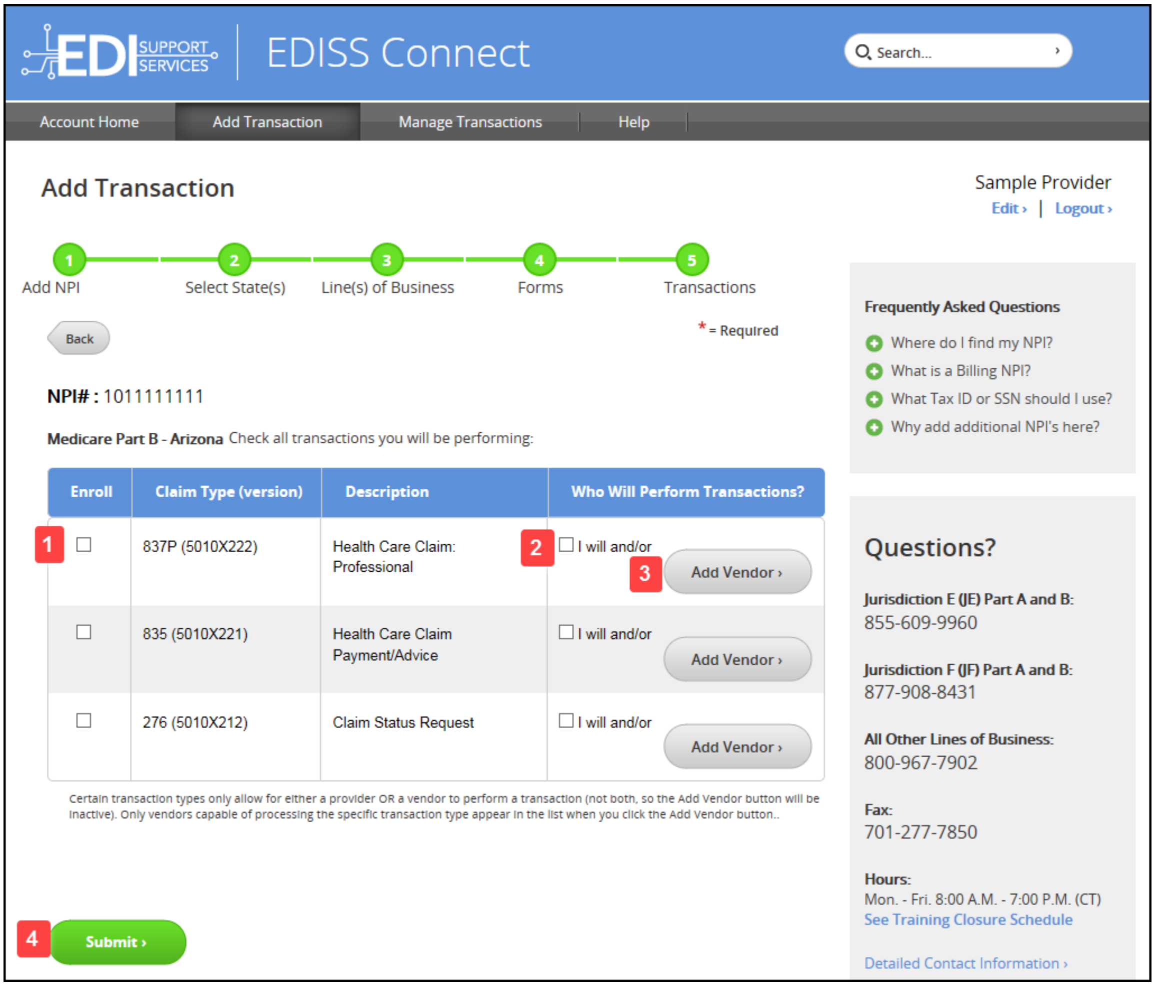
2. You will also need to check who will perform the transaction. **I Will and/or** will be indicated if you will be submitting/receiving directly using a network service vendor.

3. If you will be using a vendor, the **Add Vendor** option will be selected to indicate the Clearinghouse or Billing Service that will send or receive the electronic data. 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: *Only vendors that perform that type of transaction for that state and line of business will display within the list.*

4. Once all transactions are added, click **Submit** on the bottom of the page to finish adding the transaction(s).

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.*

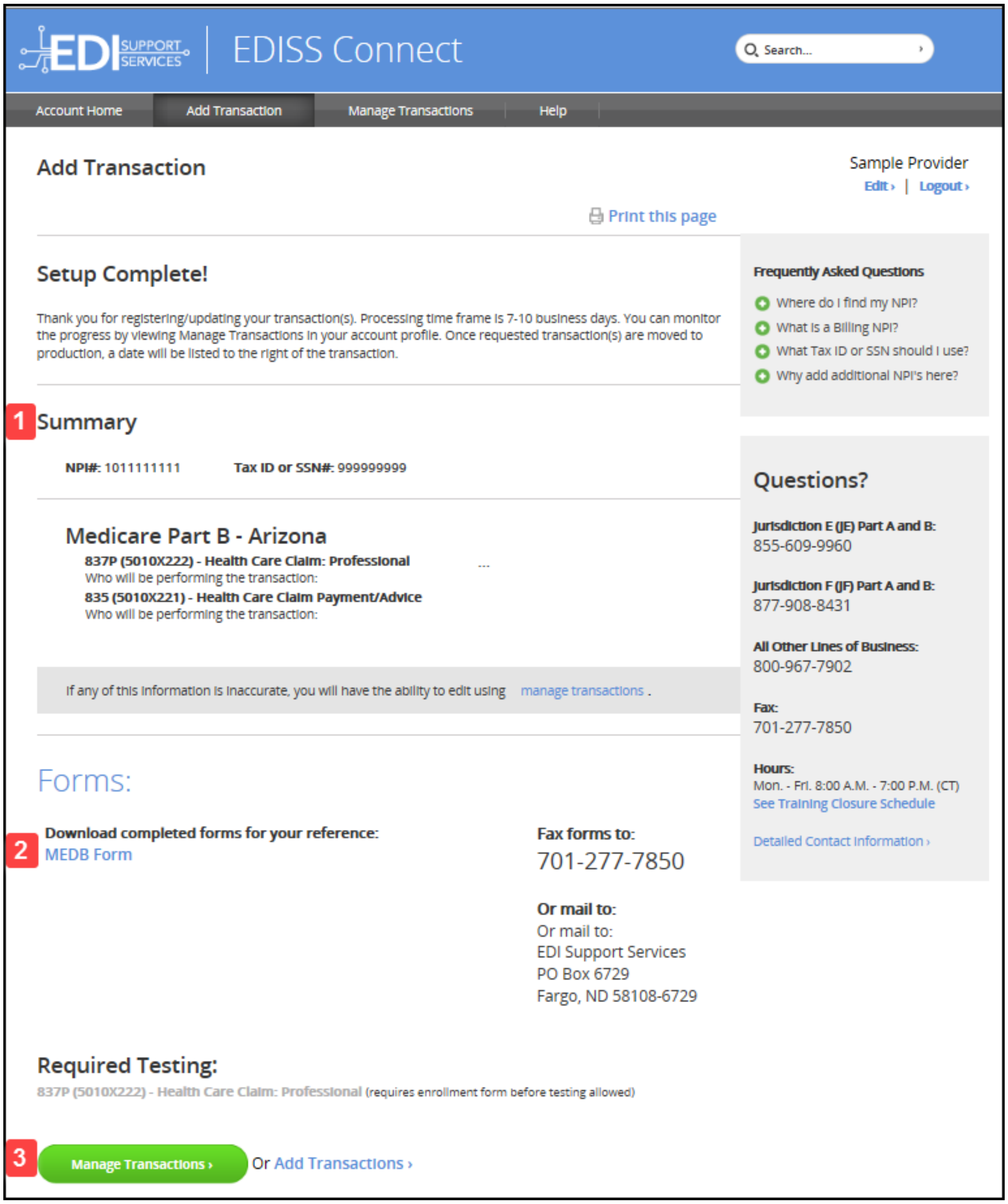


Add Transactions – Setup Complete

1. Once the transactions are complete, a summary of the transactions that have been setup will display with the ability to print this page for your records.

2. From this page, you will have the ability to print any required forms.

3. Once you are finished, you can go to **Manage Transactions** to view what is set up in the account profile or **Add Transactions** to add additional NPIs.



Manage Transactions

1. **Manage Transactions** in the main navigation area allows you to view and manage all transactions that have been setup.

2. The left navigation panel allows you to manage transactions, view testing history for test files already submitted and view forms that are required to submit.

3. If you have multiple pages of NPIs in your account profile, you can search for a specific NPI.

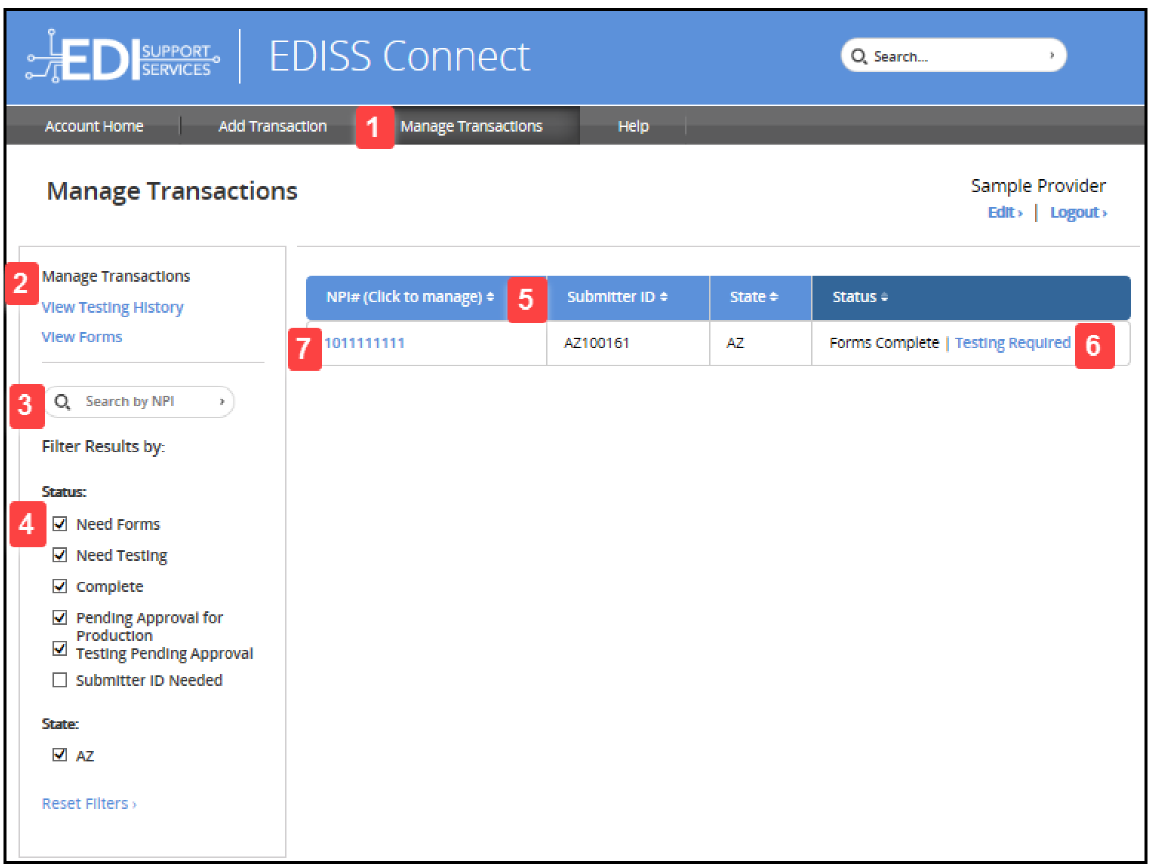
4. You can filter the results of your search to display only transactions with a certain status or add specific states where you do business (if applicable).

5. If you click on an NPI, it will load the transactions detail page associated with that NPI.

Note: *You can sort the transactions by any field in the header row by clicking on the arrow next to the header title.*

6. The status shows forms required, testing required or if the transaction is complete and ready to submit claims.

7. Click on the NPI link in blue to go to the detailed transactions page.



Manage Transactions – Detailed Transactions

1. This is the Detailed Transactions page for a specific NPI. At any time, you can go back to the Manage Transactions overview page.

2. You can delete an NPI. All transactions associated with that NPI will also be deleted.

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

4. The status shows either Forms Required or Testing Required at a glance for the NPI. If you click on **View Forms**, the required forms will be available for download as a PDF file.

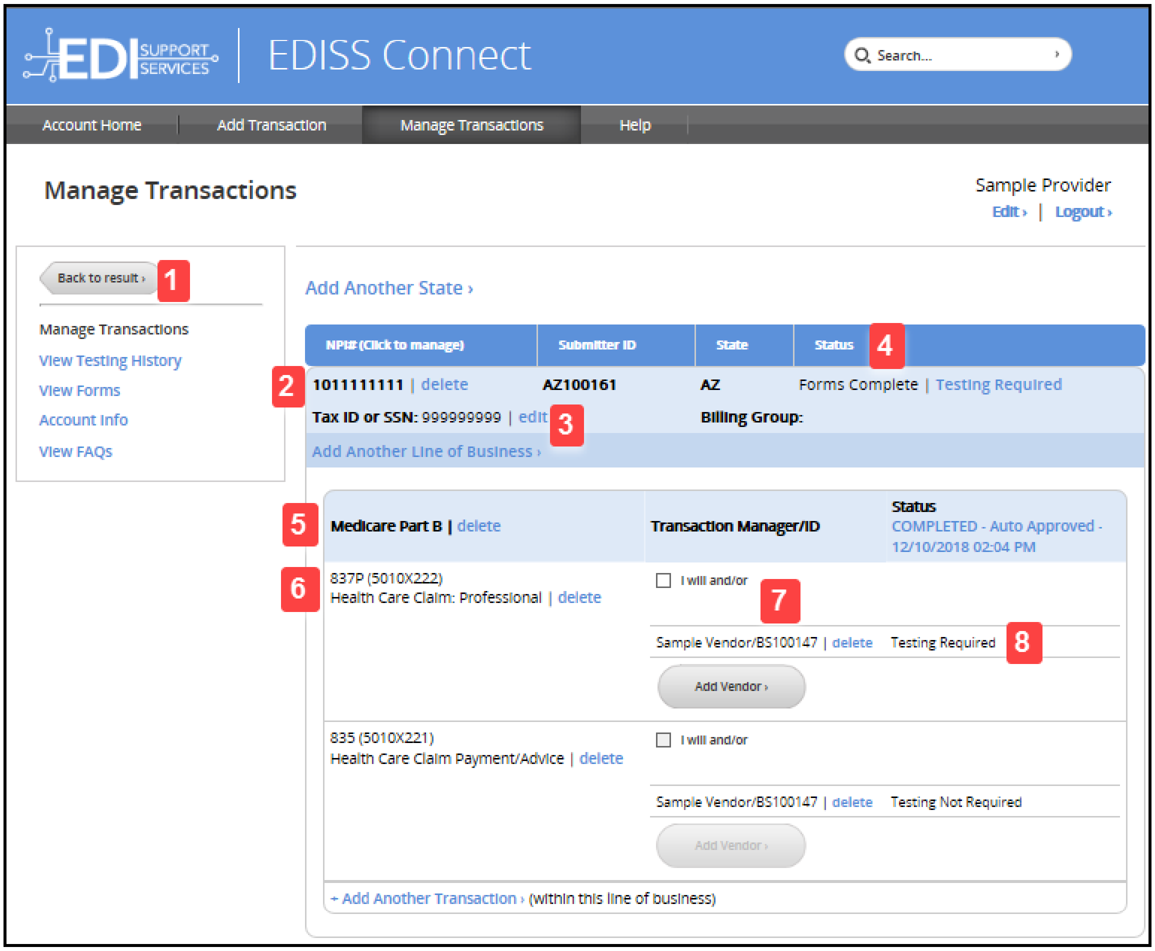
5. The line of business is displayed below with the ability to delete it at any time. On the far right, once required forms are accepted electronically for this specific line of business, a date will appear as well as a statement indicating Forms Complete – Approved.

6. Specific claim types are listed below the line of business with the ability to delete. Removing and restarting transactions can create delays in the production process.

7. 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 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**.

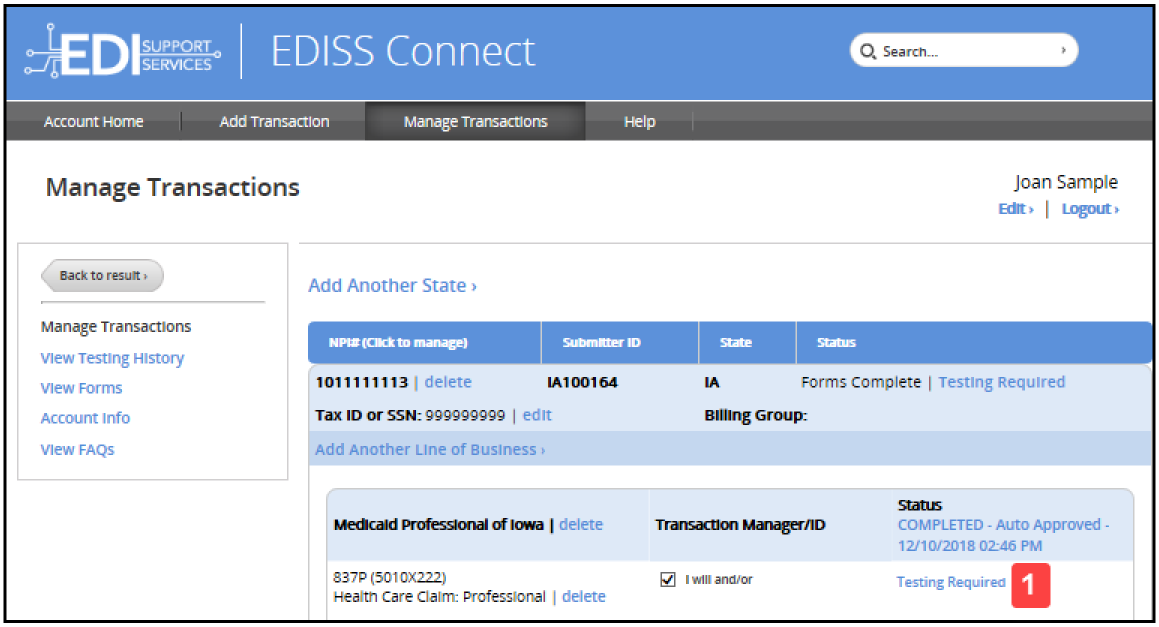
Note: *If unable to click the* ***Add Vendor*** *button or select* ***I will and/or****, it means you have already selected the maximum number of submission options. You must remove an existing submission option, before you can add your new submission option.*

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



Submit Test File

1. To submit a test file, click **Testing Required**.

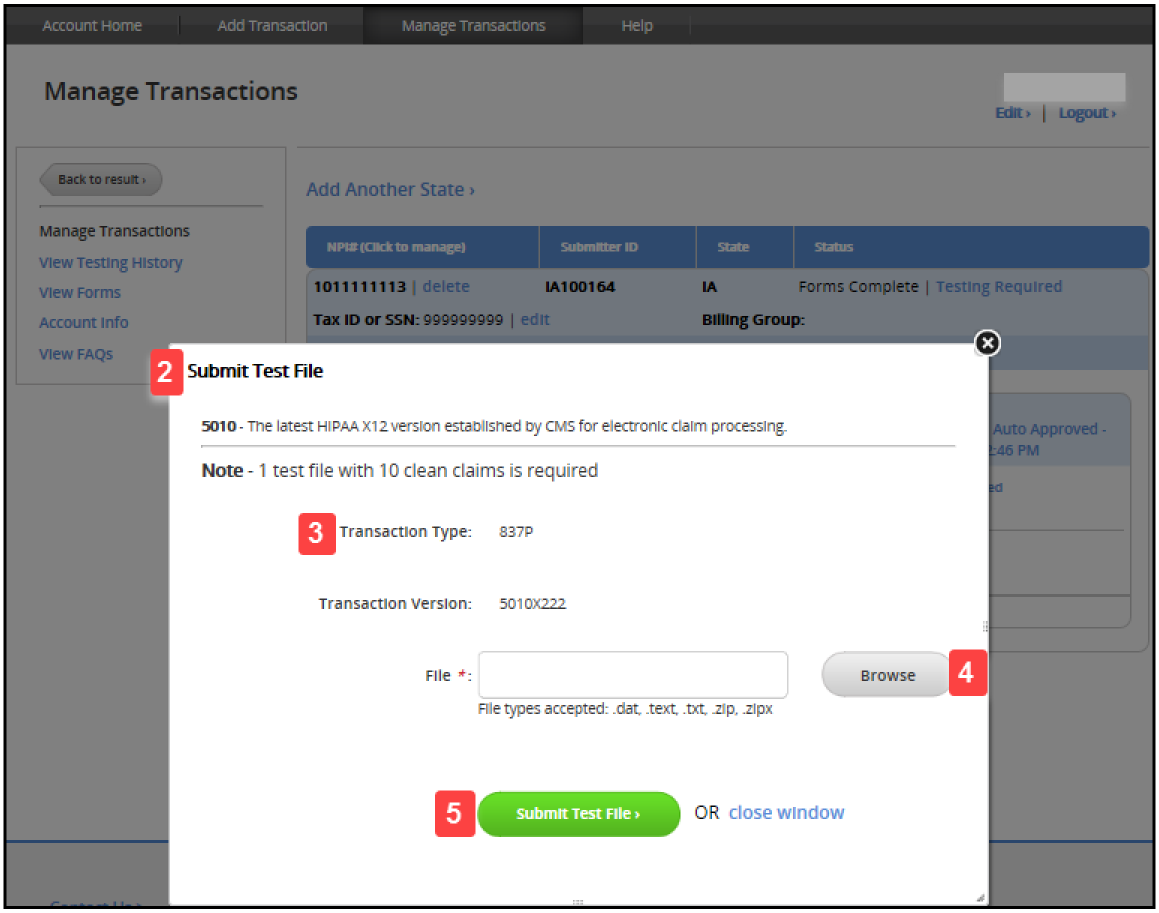


2. The following screen shows the Submit Test File window.

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.*

3. The transaction type and version are shown as reference for what the system needs to test.
4. You can click **Browse** to locate a claim file from your desktop. Accepted file types include a .txt or .dat format.
5. Once you have selected a file click **Submit Test File** and the system will automatically upload the file.

Note: *A thank you page will display upon successful submission. Test files may take up to 48 hours to indicate if they have passed or failed validation.*



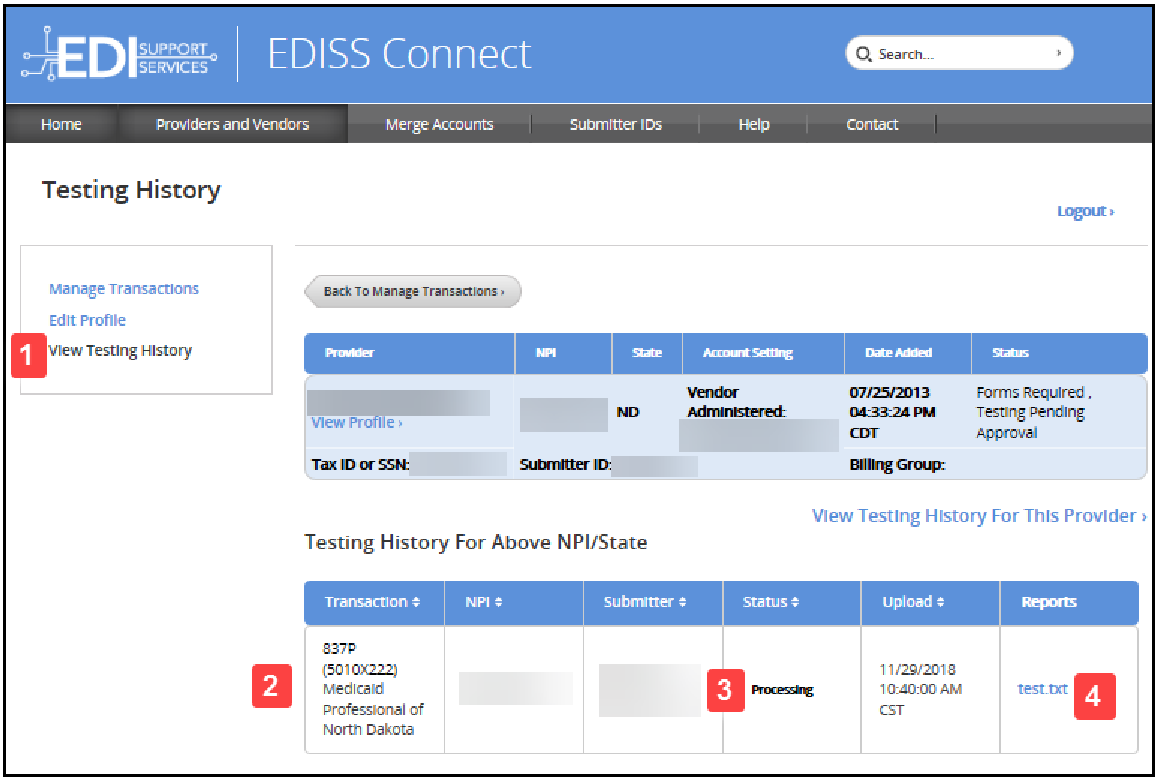
View Testing History

1. The View Testing History page displays all the test files submitted for your NPIs and overall EDISS Connect Account.

2. The line of business and transaction type will show in the first column with the associated NPIs displayed in the next column.

3. The status shows if the file is processing, passed or failed. If the file failed to pass validation, you can upload another test file by clicking **Upload another file** below the failed status.

4. Reports are created from the EDISS Connect testing workflow. Each file is a hyperlink that will open the actual report in X12 format. These files can be saved or translated in your software of choice for future reference.



View Forms

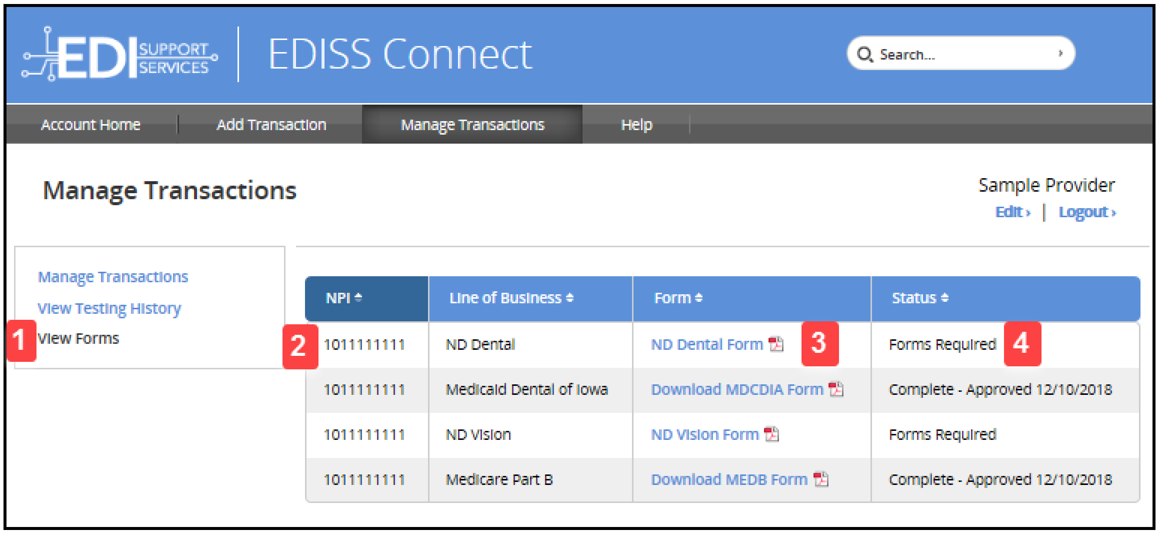
1. The View Forms page provides a list of forms that are required by EDISS to have transactions setup properly and approved.

2. The forms are listed as required by each NPI.

3. The form name will show up as a link. Simply click the link to download the form as a PDF file.

Note: *Once the Vendor Administrator has added transactions to the provider account, the* ***provider*** *must accept the required form(s). Forms can be viewed and accepted by the* ***provider*** *from this page. Transactions will not be moved into production until the provider has accepted the required form(s).*

4. The status shows if the form is still required or if it is complete with an approved date.



Manage Users

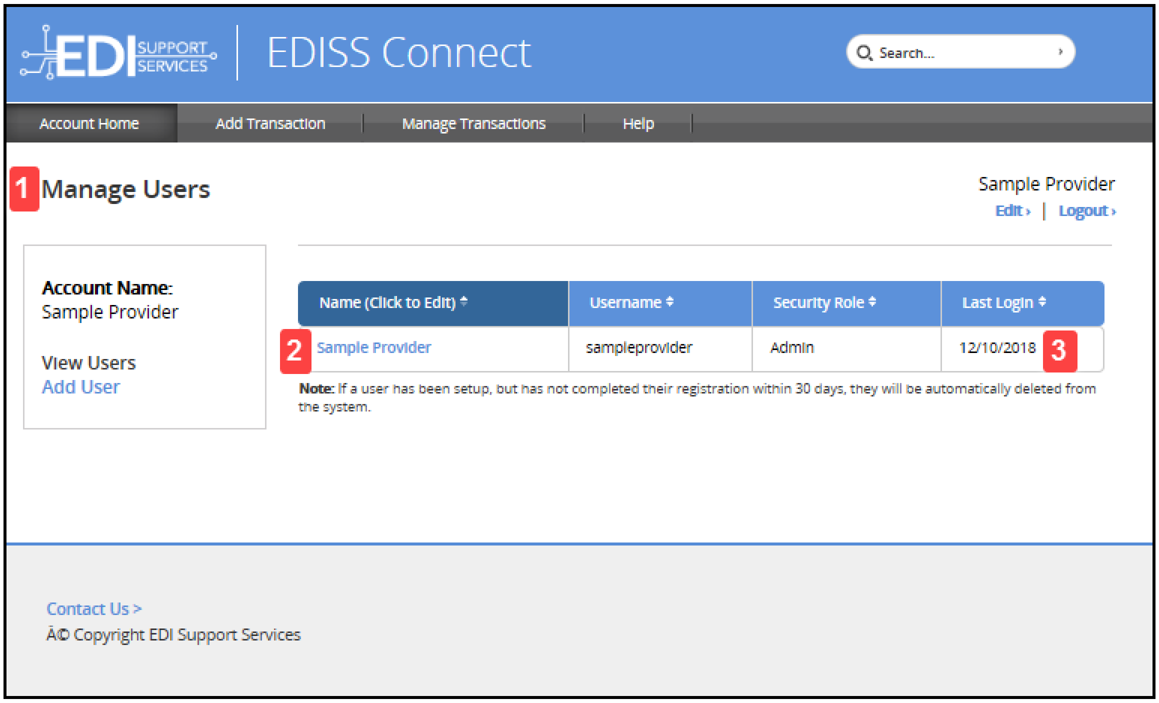
In order for Connect user accounts to stay active, users must login at least once every 60 days.

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

1. This window displays the users associated with the account.

2. The name is shown in the first column. To view details about that 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.



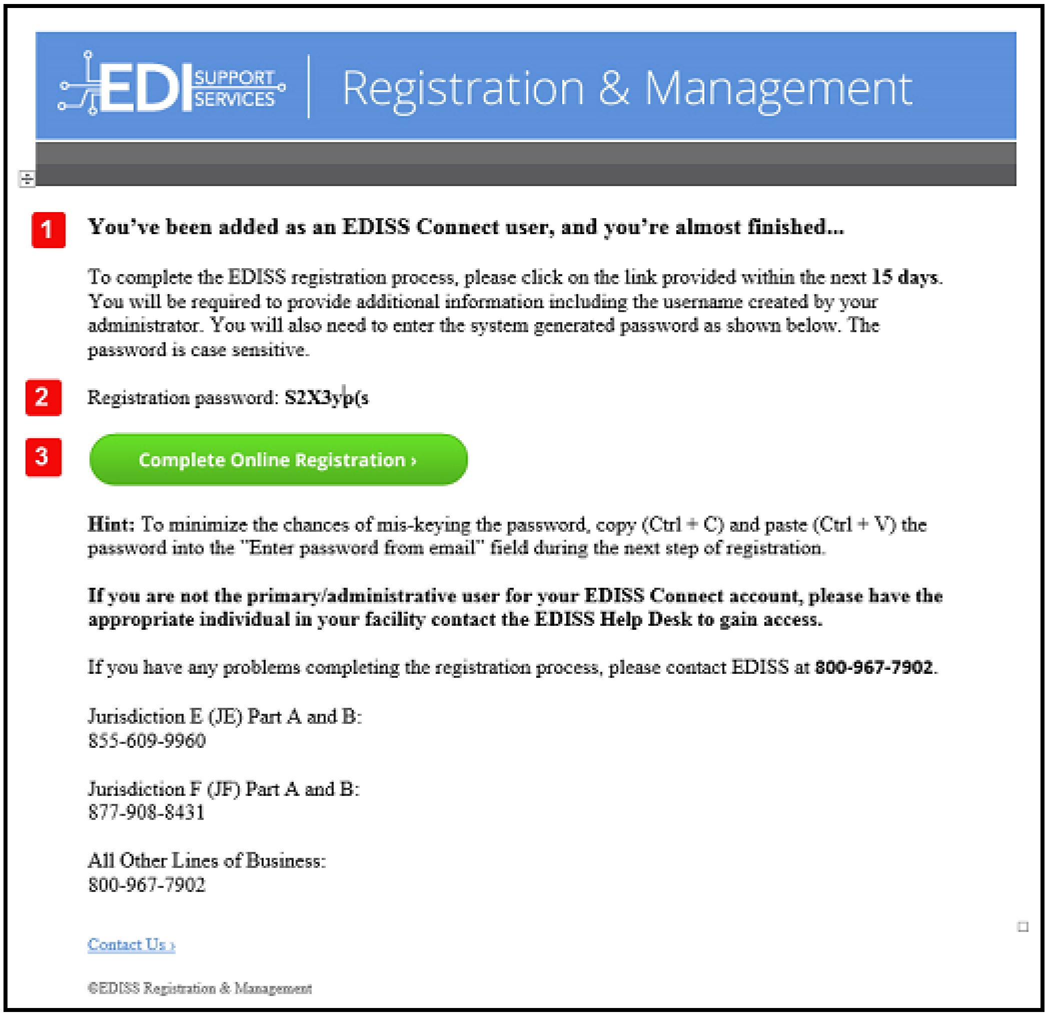
Manage Users – New User

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

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

3. The user <u>must</u> click **Complete Online Registration** to finish their registration.

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



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.

Registration password: **S2X3yp(s**

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

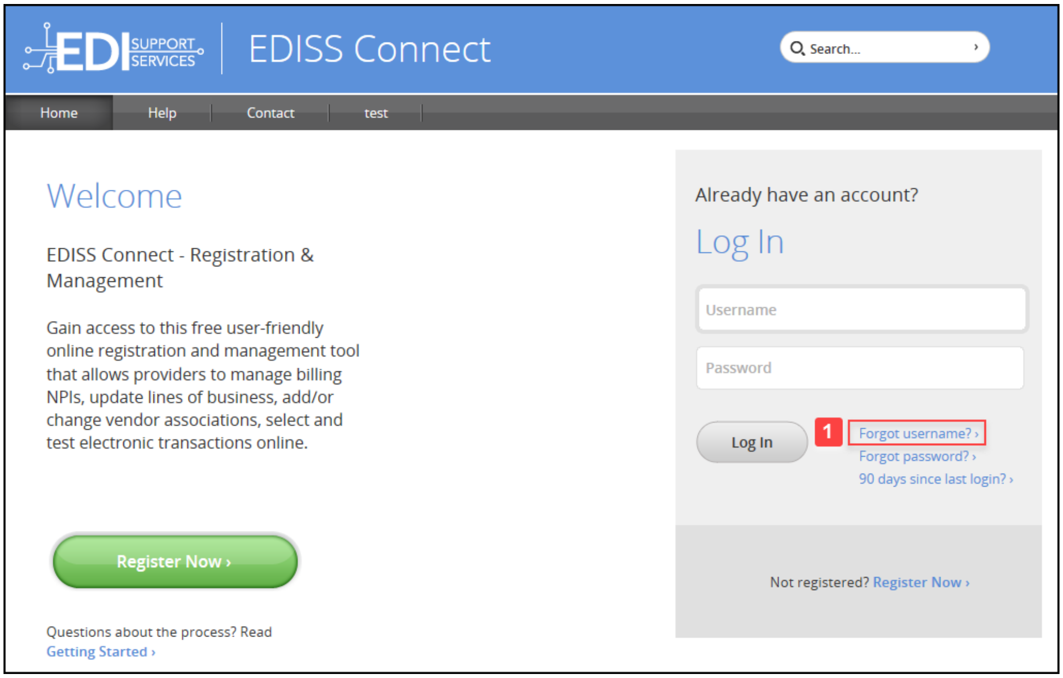
All Other Lines of Business:
800-967-7902

Contact Us ›

©EDISS Registration & Management

Forgot Username

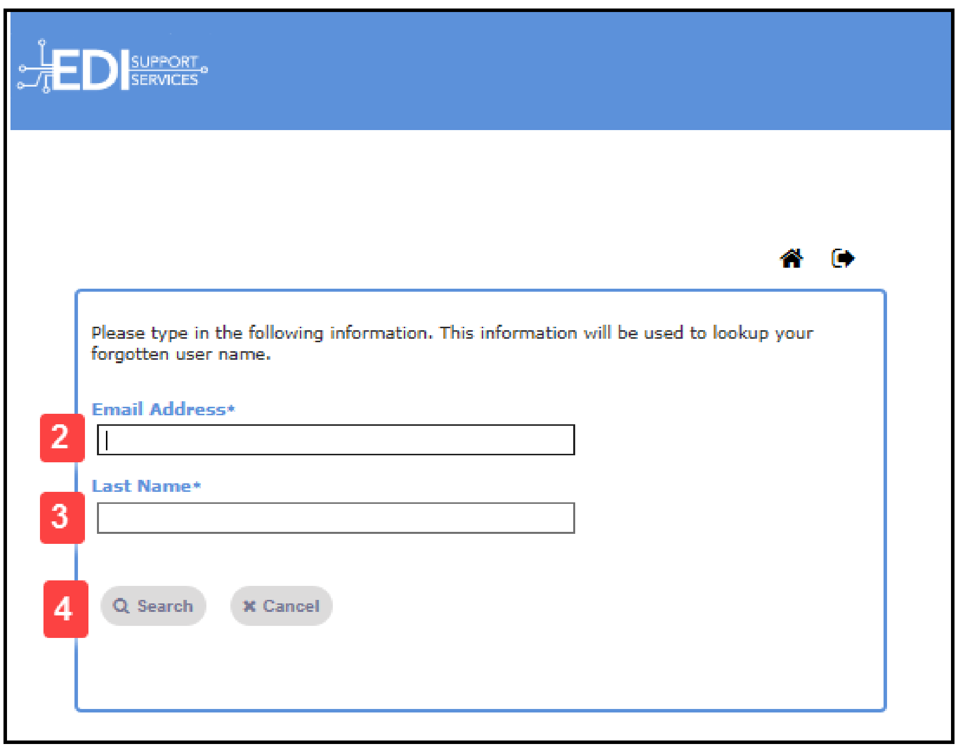
1. If the EDISS Connect username has been forgotten, click **Forgot username?** on the Log In screen.



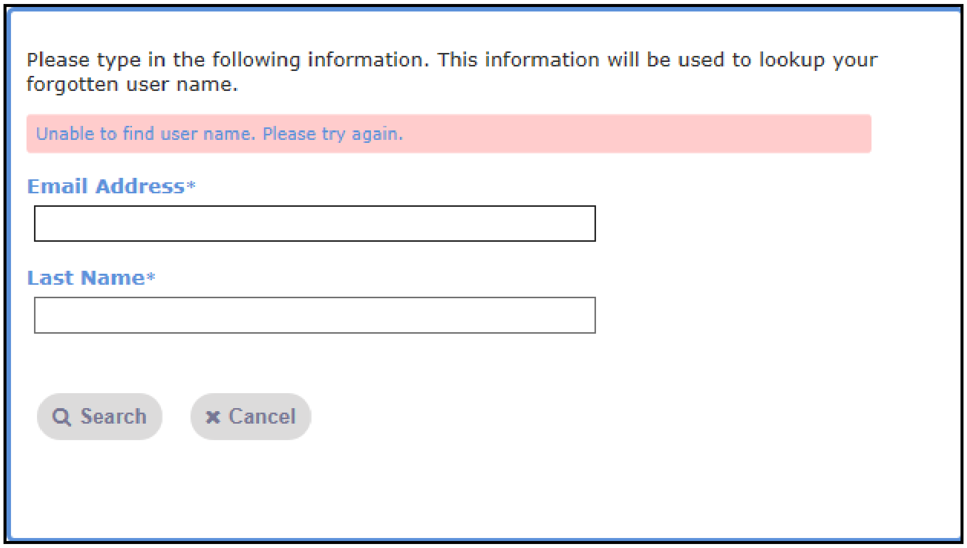
2. Enter the email address associated with the user's account.

3. Enter the user's last name.

4. Click **Search**.



Note: *If a username was not found with the email address and last name entered, you may try again or use the "90 days since last login?" option on the Log In screen.*

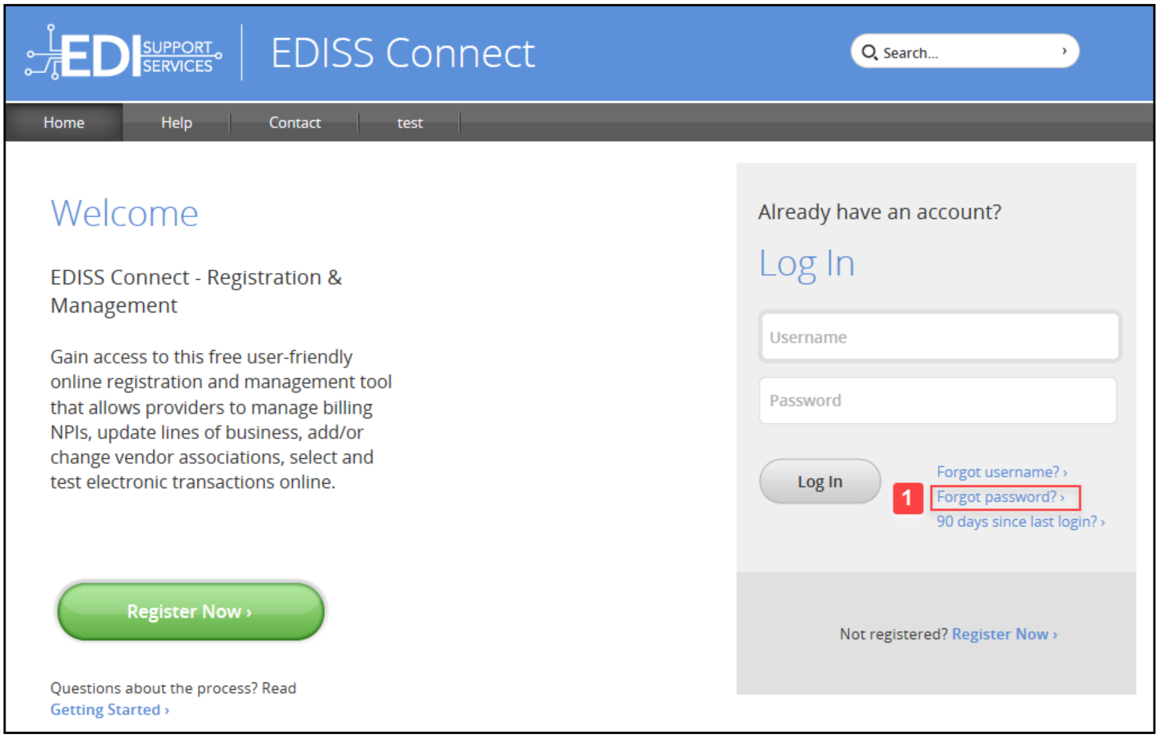


If a username was found linked to the email address and user's last name, it will appear in the following message.

5. Click **Continue** to go to the Log In screen.

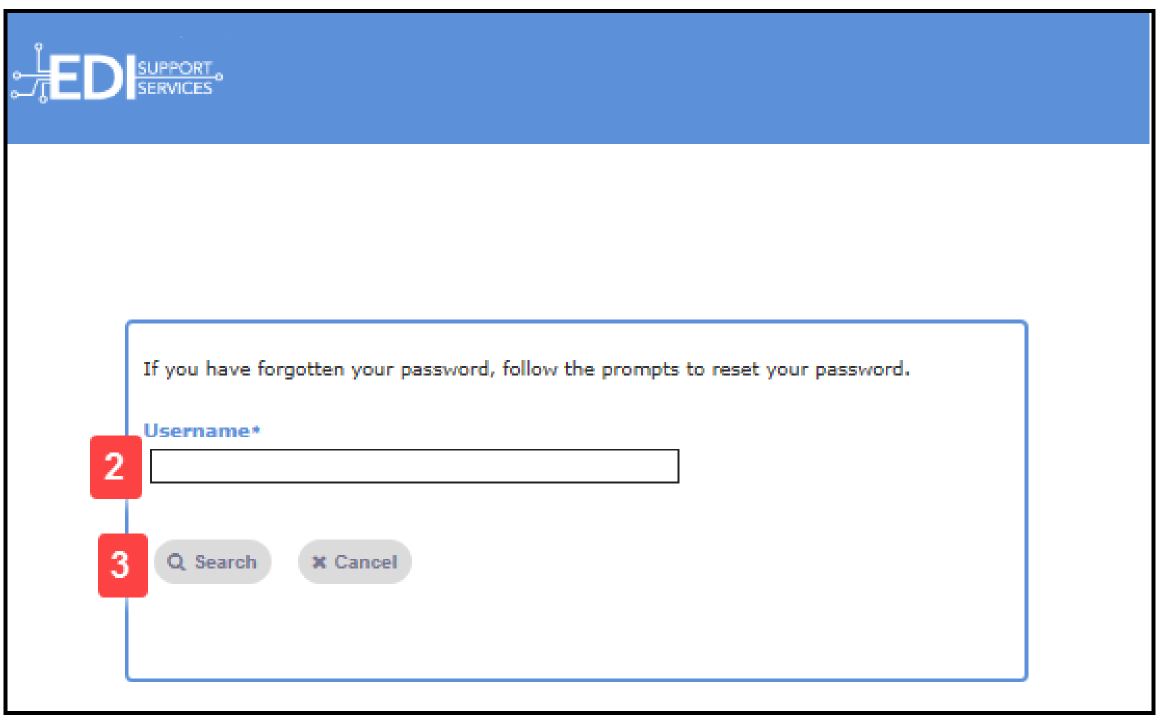
Forgot Password

1. If the EDISS Connect password has been forgotten, click **Forgot password?** on the Log In screen.

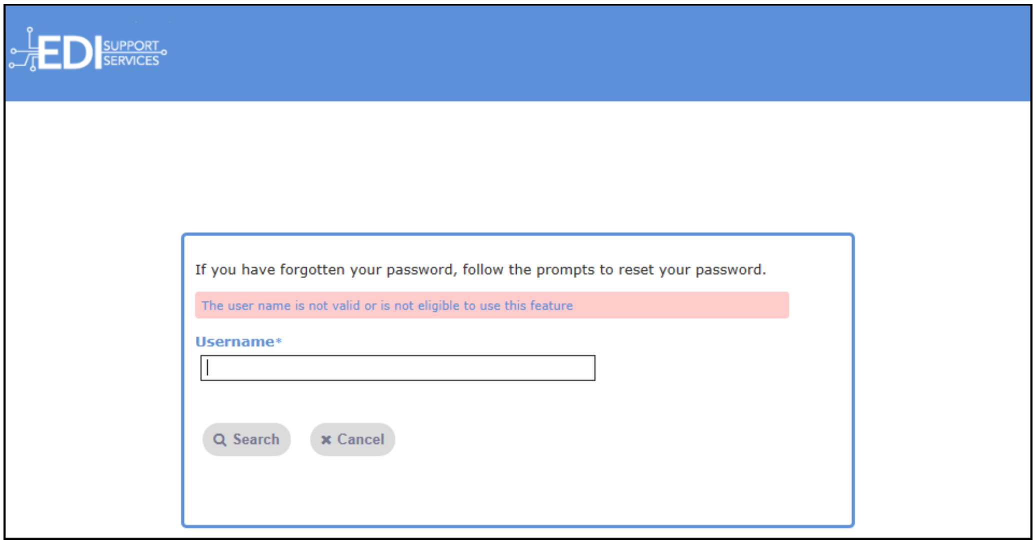


2. Enter the Connect username.

3. Click **Search**.

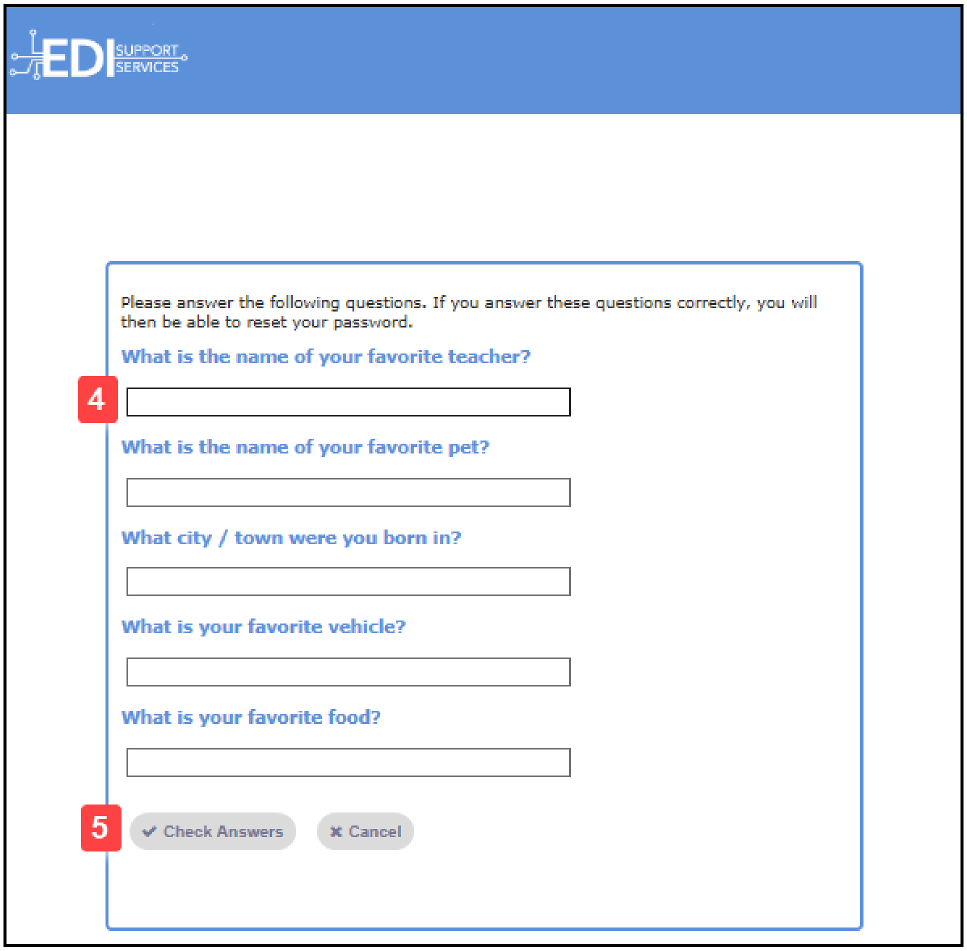


Note: *If a username was not found, you may try again or use the "90 days since last login?" option on the Log In screen.*

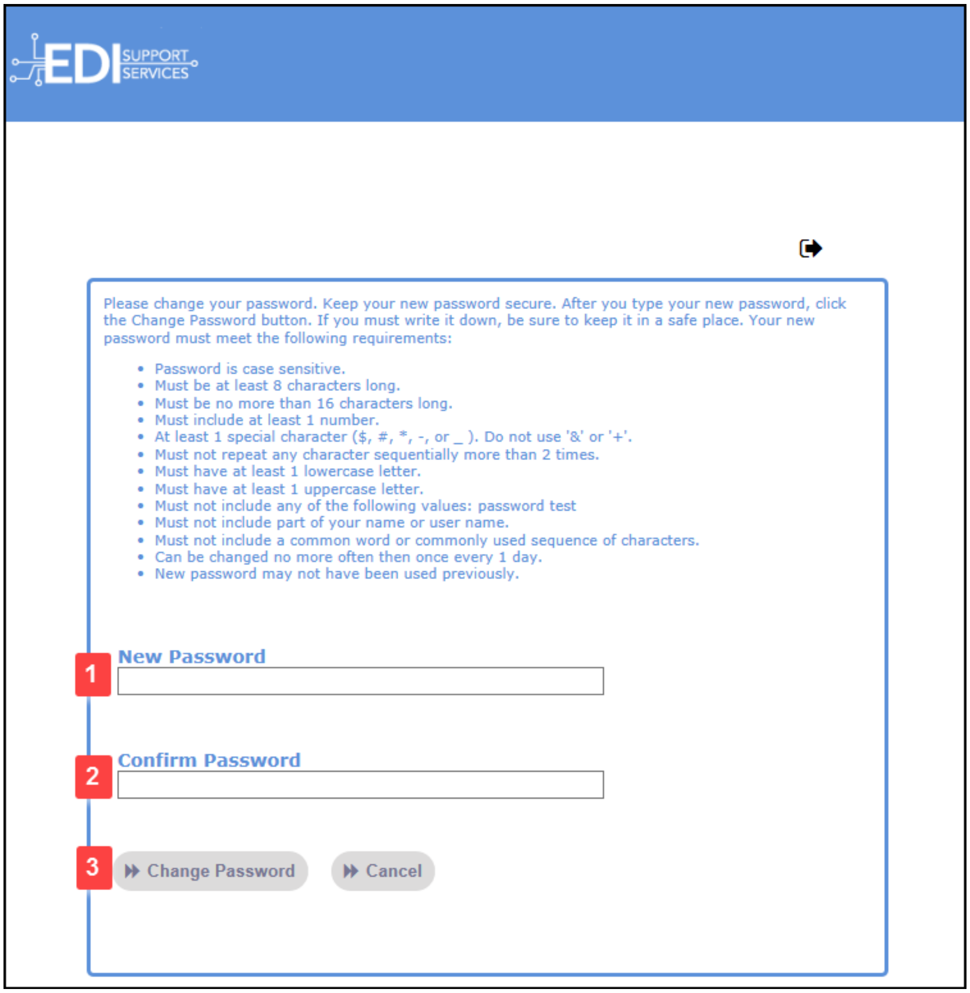


4. If the username was found, answer the security questions that had previously been setup.

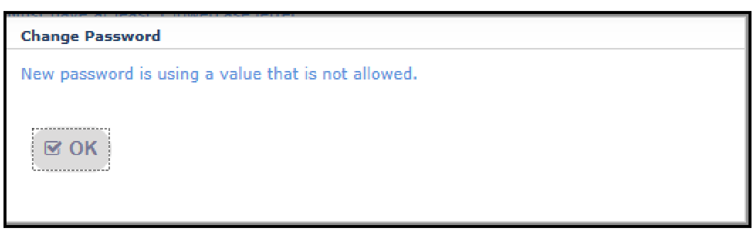
5. Click **Check Answers**.



6. Enter a new password using the password criteria listed on the screen.
7. Confirm the new password.
8. Click **Change Password**.



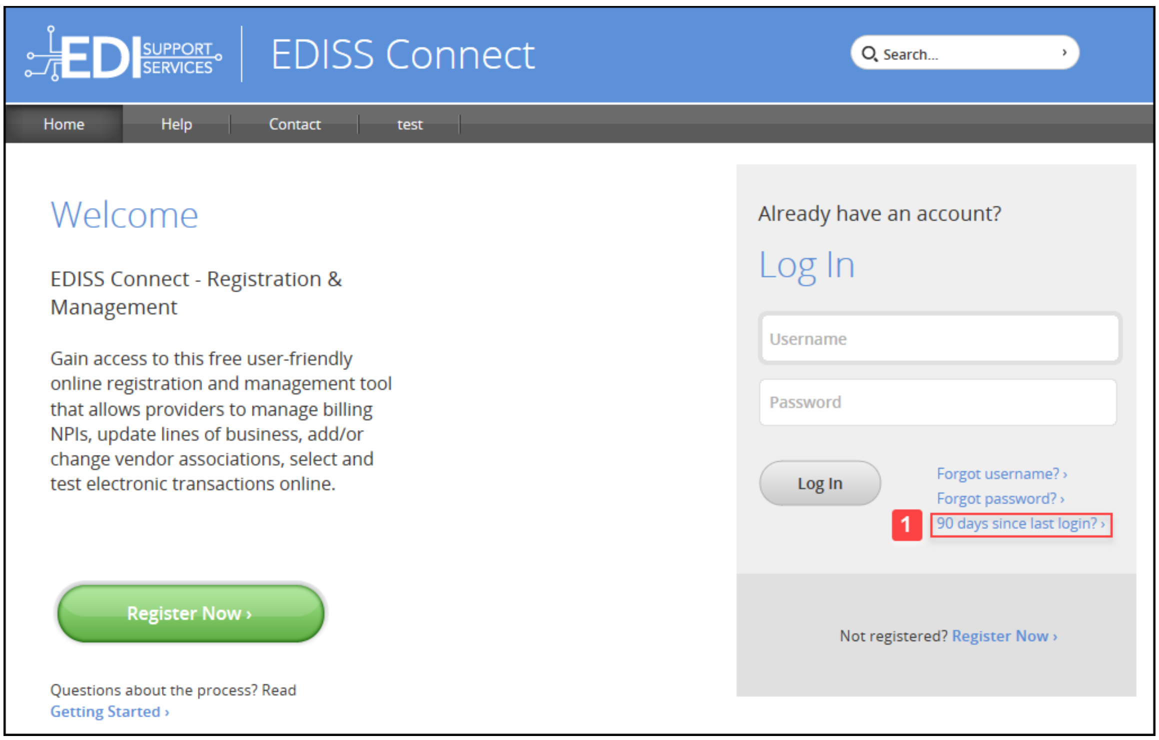
Note: *If the password does not meet the required criteria, the following message will appear:*



9. If the password was successfully changed, click **Continue** to go to the Log In screen.

90 Days Since Last Login

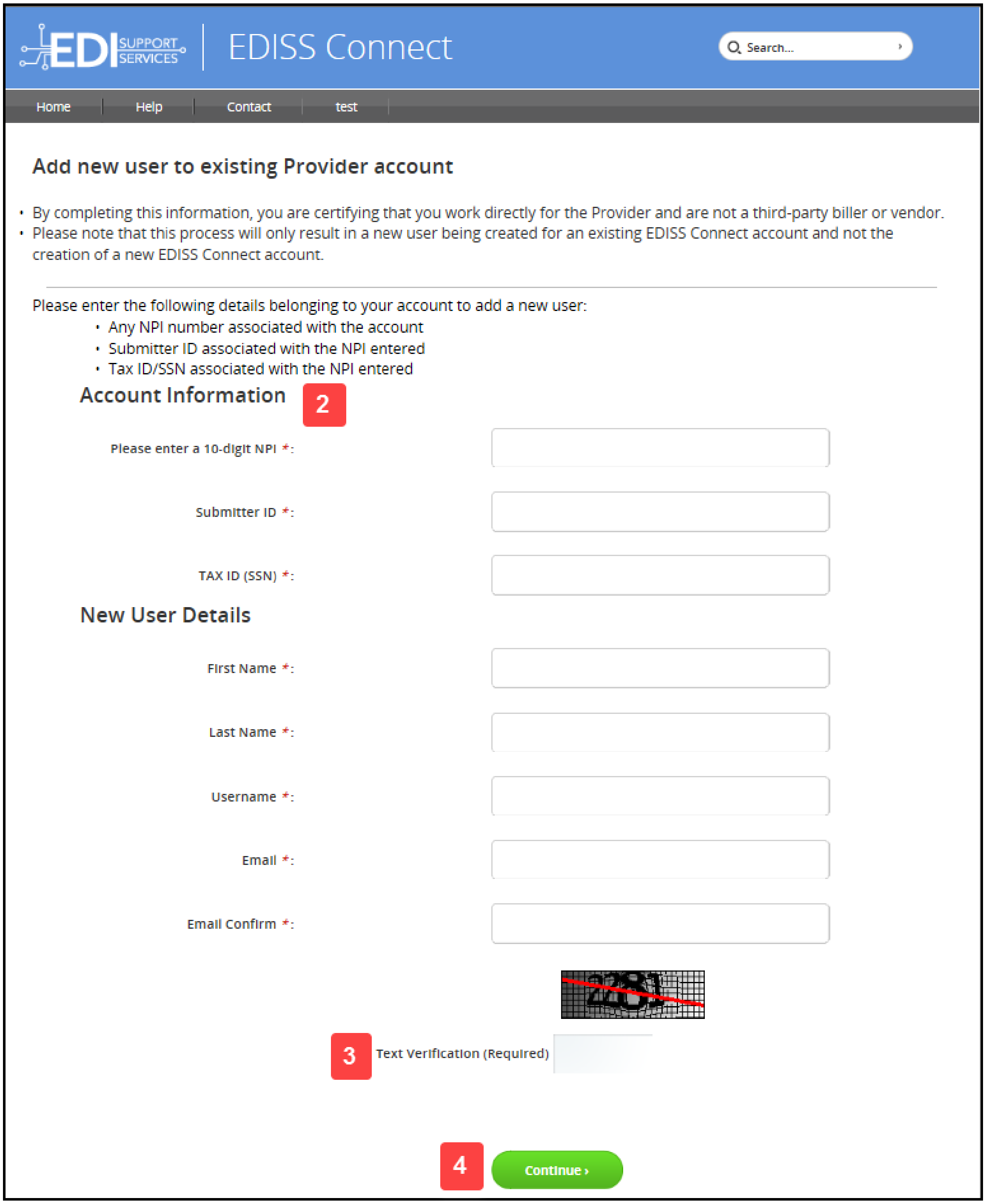
1. If it has been 90 or more days from the last login, use **90 days since last login?** option to create a new user to the existing Connect account.



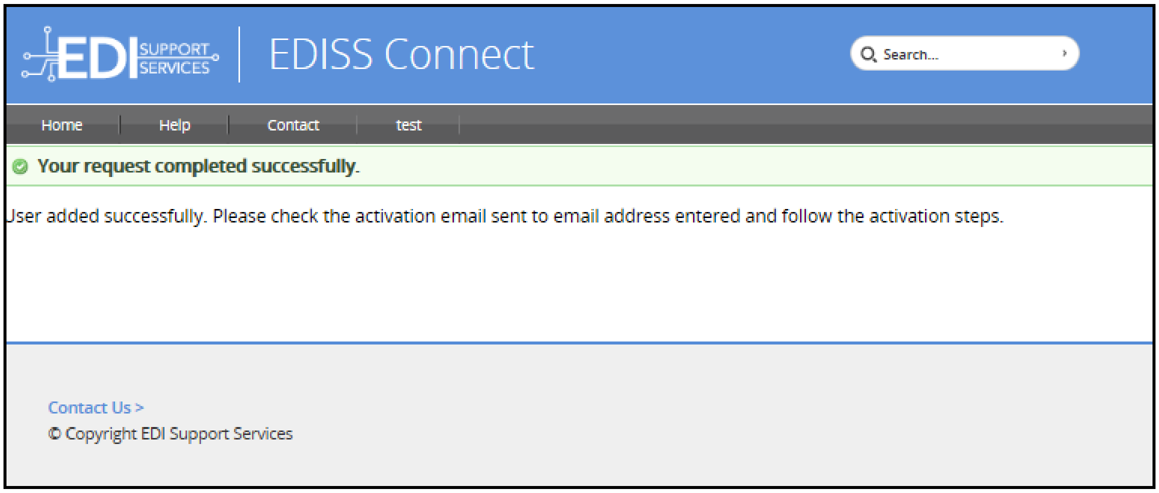
2. Add the appropriate NPI, Submitter ID and Tax ID/SSN combination for the profile you are trying to access, along with the user information.

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

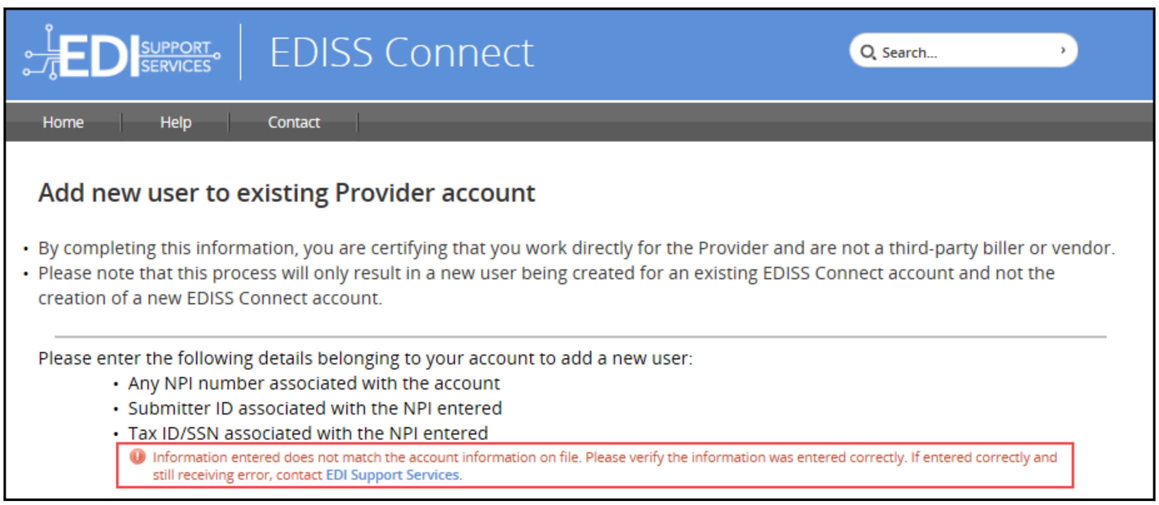
4. Click **Continue**.



The following message will appear if the new user was successfully added.



Note: *If the correct NPI, Submitter ID and Tax ID/SSN combination was not entered, the following message will appear:*



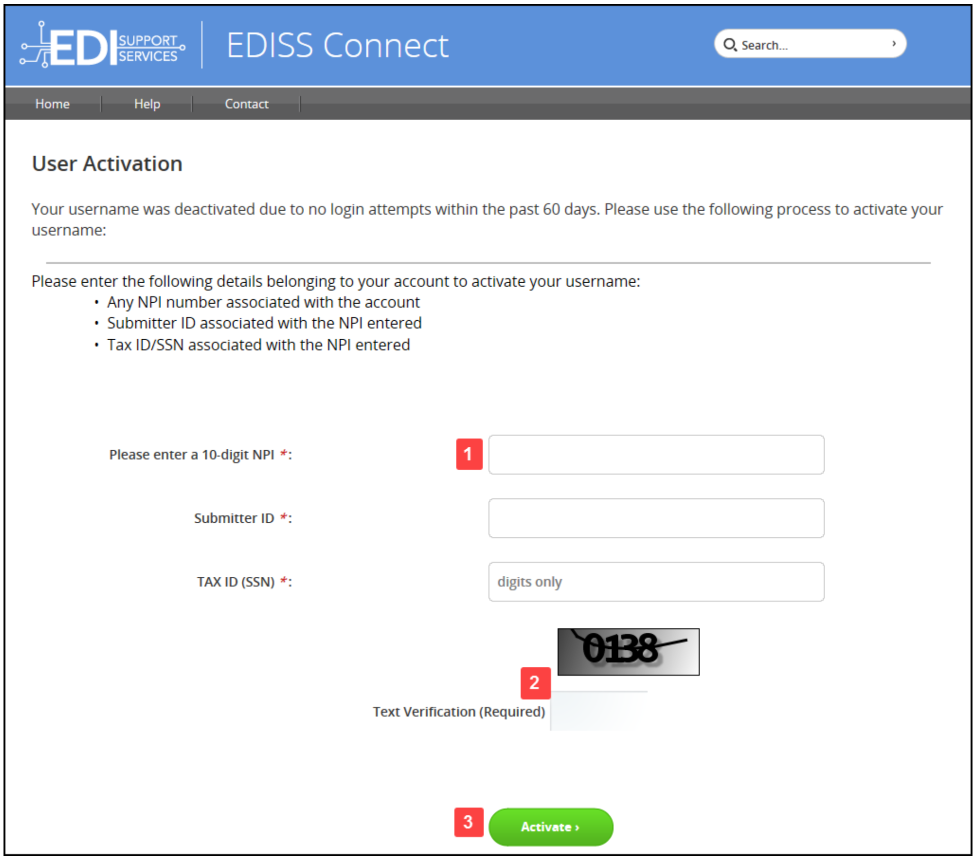
60-90 Day User Reactivation

If the last login was between 60-90 days, you can reactivate the current user by logging in and completing the User Reactivation screen.

1. Add the appropriate NPI, Submitter ID and Tax ID/SSN combination for the profile you are trying to access.

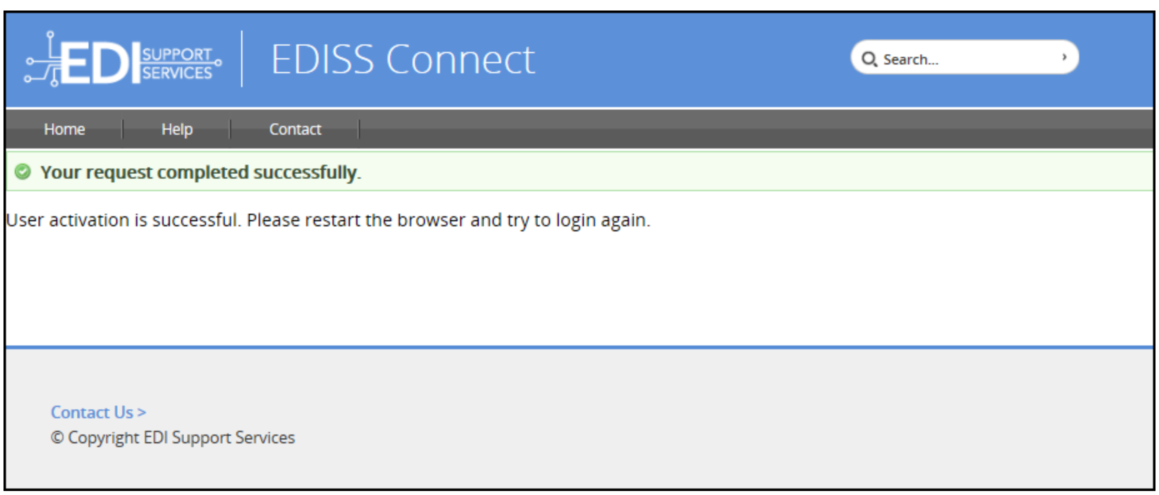
2. Complete the Text Verification by entering the characters from the image.

3. Click **Activate**.

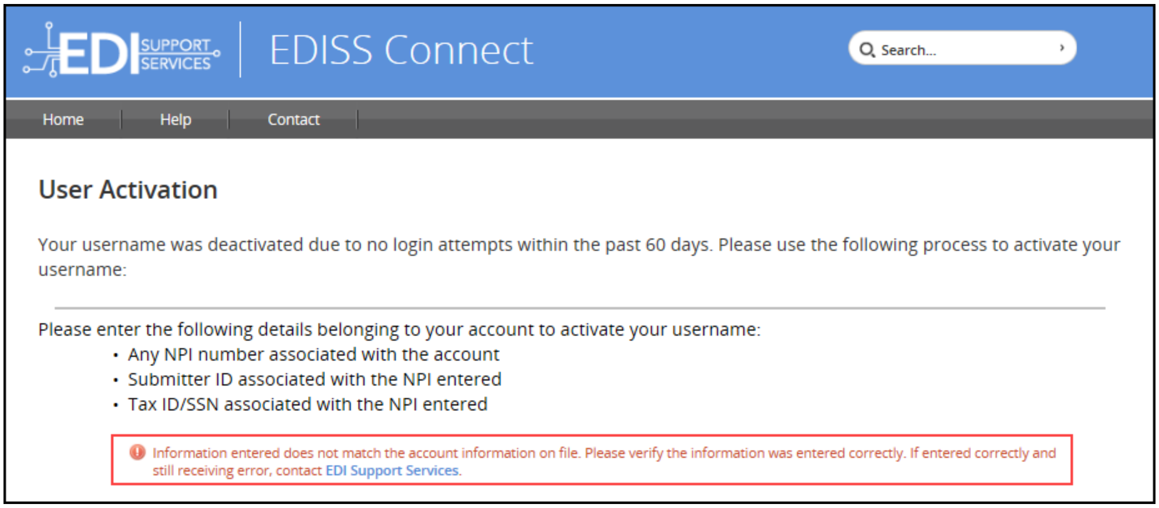


If the user was successfully reactivated, the following message will appear.

Note: *Restarting your browser is strongly encouraged.*



Note: *If the correct NPI, Submitter ID and Tax ID/SSN combination was not entered when attempting to reactivate an account, the following message will appear:*

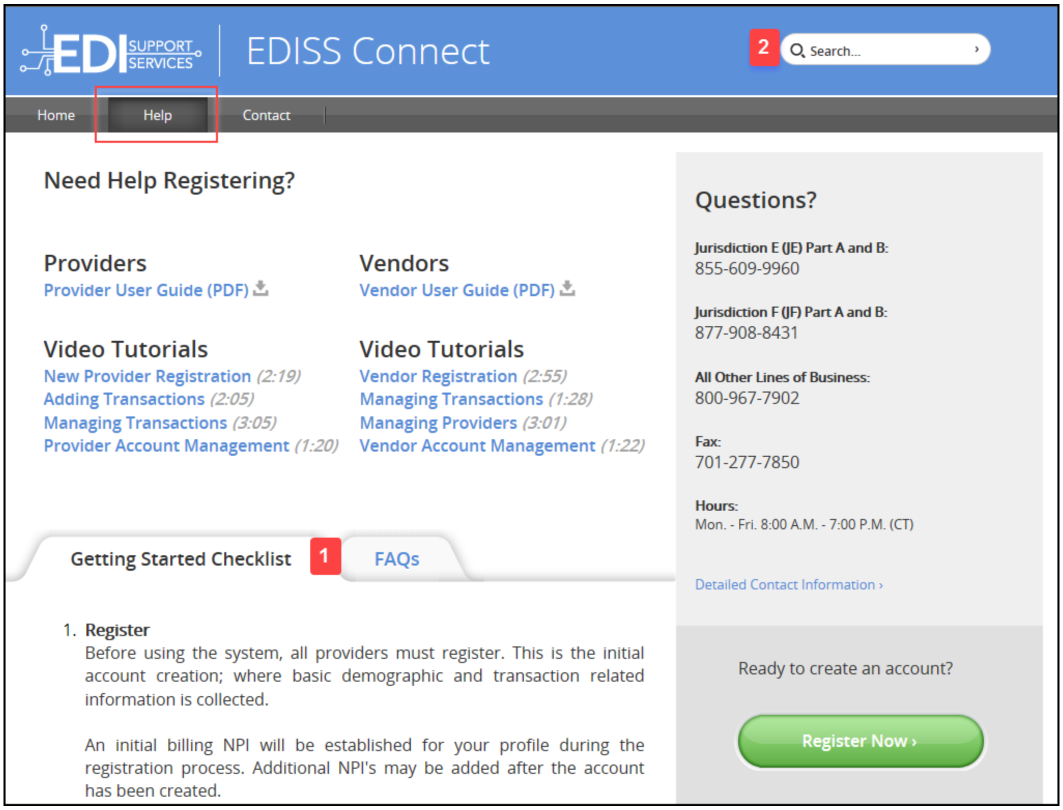


Help and Contact Information

Help

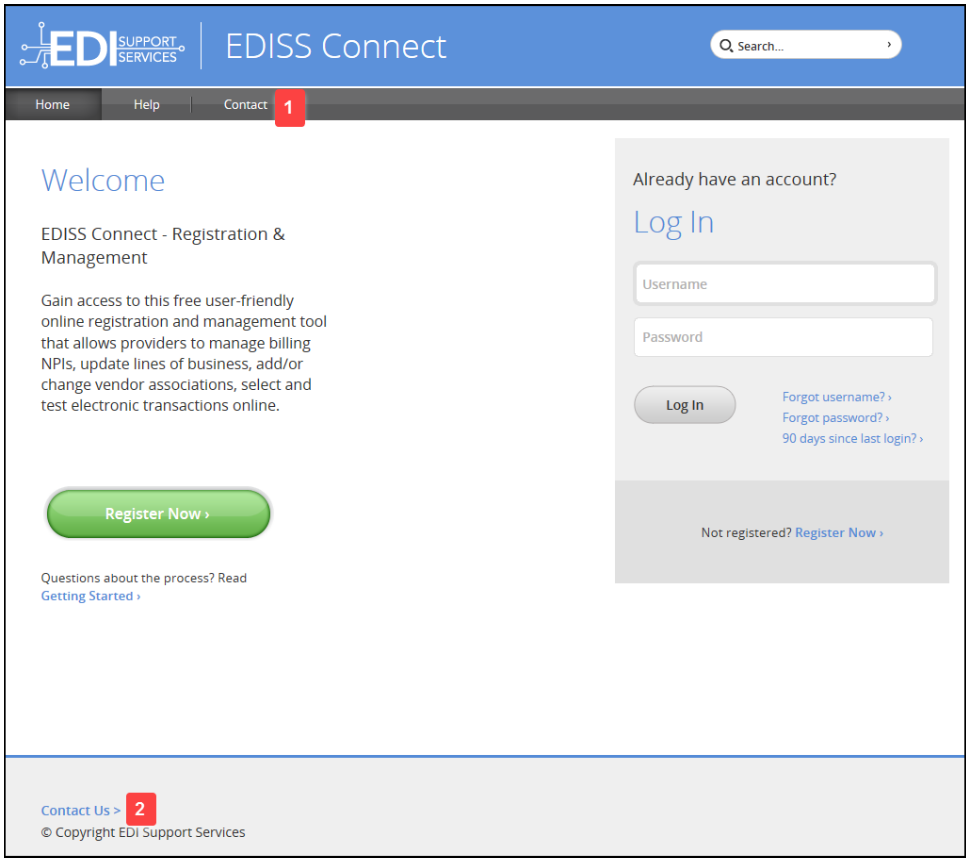
1. A getting-started checklist and frequently asked questions (FAQs) are located in the Help section of the website.

2. 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 the Contact tab in the toolbar or the Contact Us link 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

Phone: 800-967-7902

All Other Lines of Business

Phone: 800-967-7902

Fax (All Lines of Business)
701-277-7850

Mailing Address
EDI Support Services
PO Box 6729
Fargo, ND 58108-6729