EDI Support Services

User Documentation for Vendors on EDISS Connect

Purpose of the User Documentation for Vendors on EDISS Connect

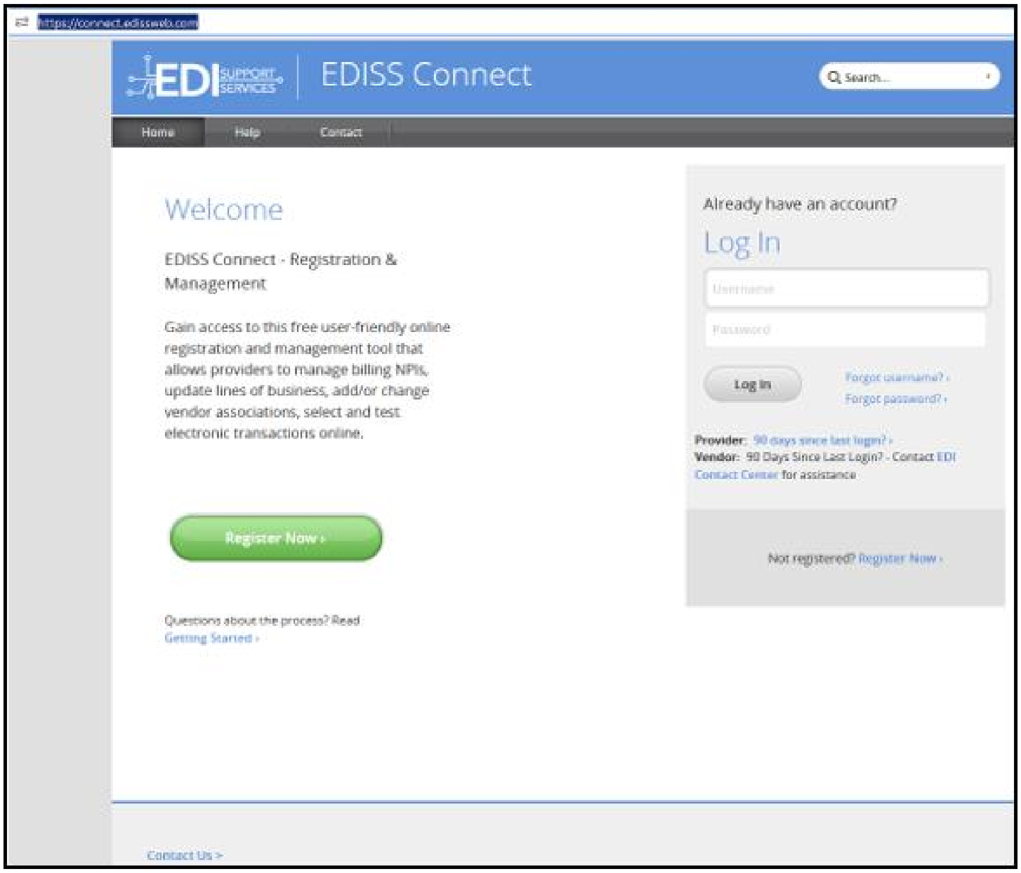
EDISS Connect is a user-friendly, online registration and electronic claim testing system. Vendors use it to register with EDISS, add users, manage providers and to manage a transaction catalog. The system also allows Vendors to test claim files for electronic submission for Non-Medicare lines of business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

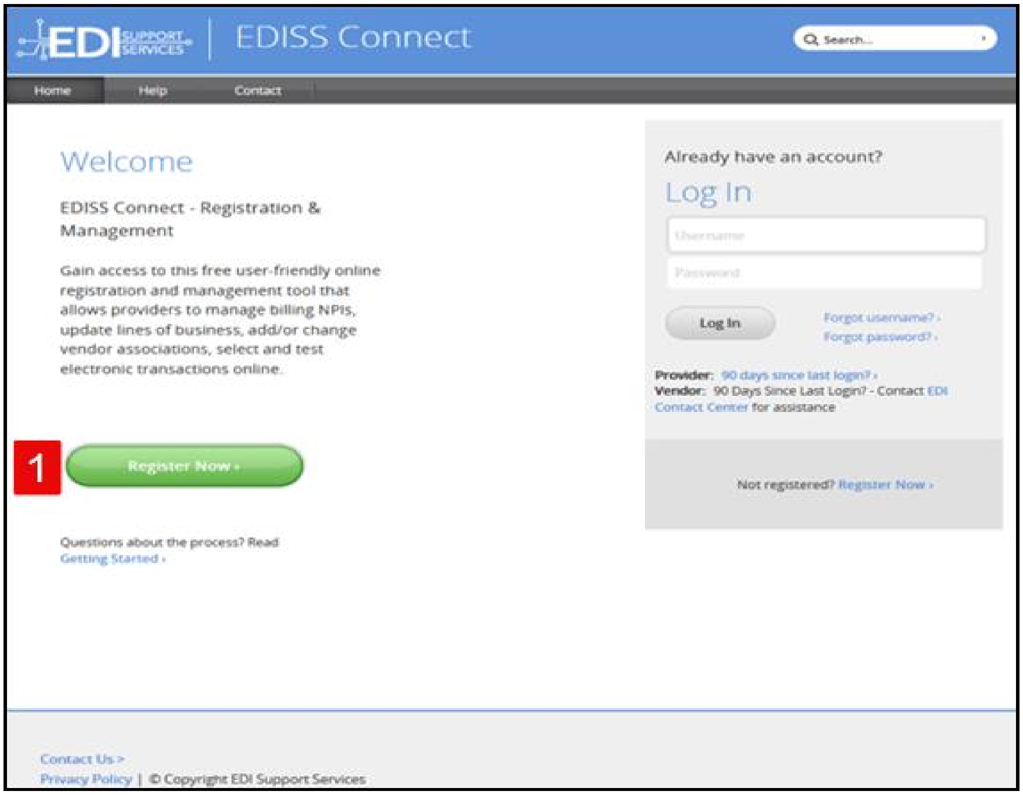


Self-Registration

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.

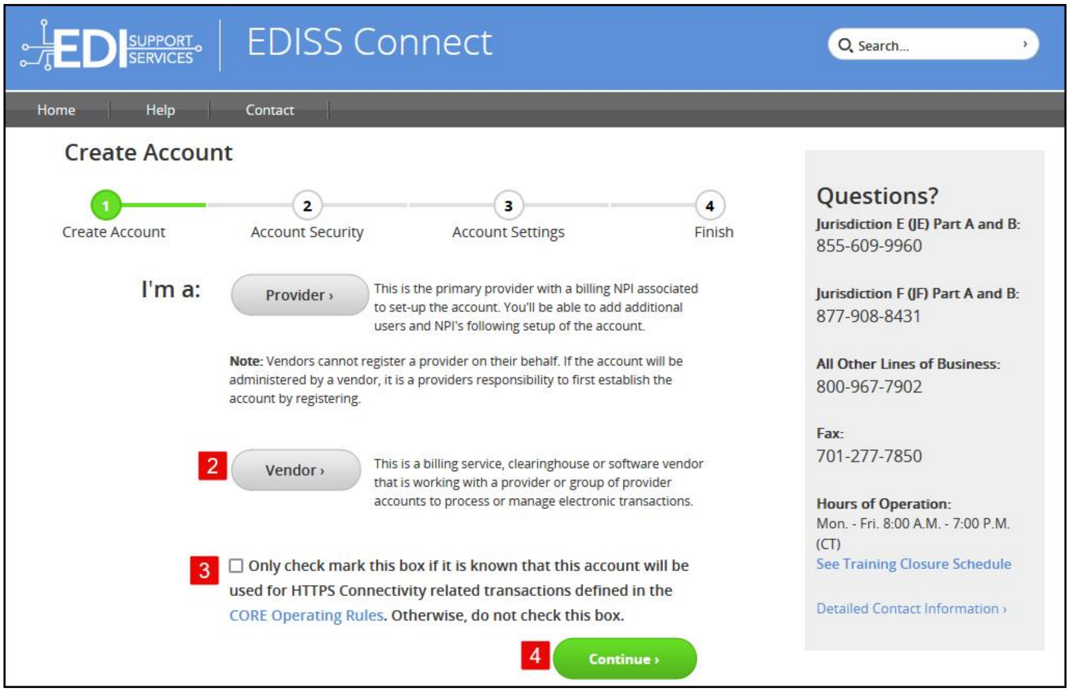


Note: *Vendors **<u>cannot</u>** register a provider on their behalf. If the account will be administered by a vendor, it is a providers' responsibility to first establish the account by registering.*

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.](https://www.caqh.org/core/operating-rules)

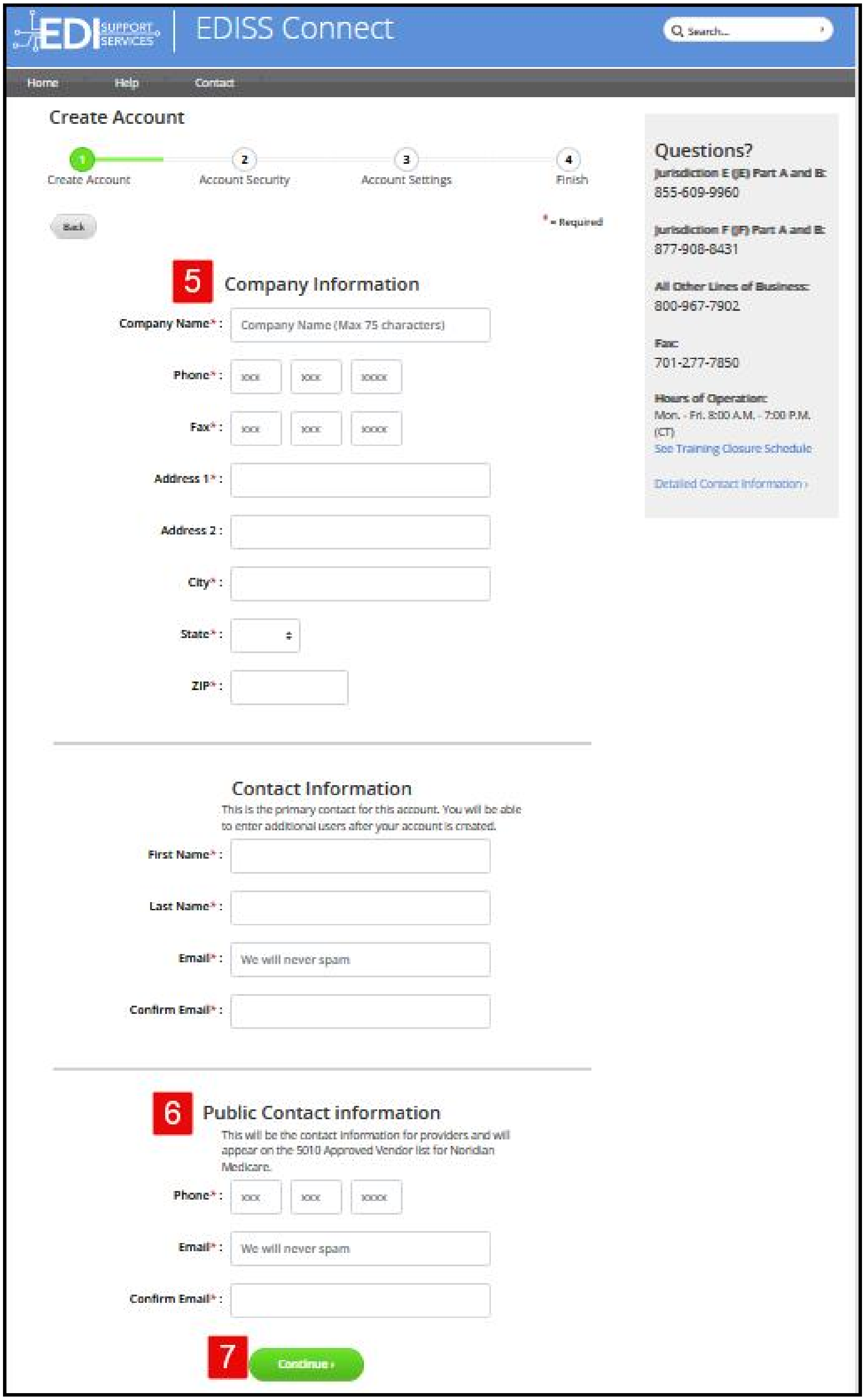
4. Click **Continue**.



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**.


EDI SUPPORT SERVICES
EDISS Connect
Search...
Home
Help
Contact
Create Account
1 Create Account
2 Account Security
3 Account Settings
4 Finish
Back
* = Required
5
Company Information
Company Name* :
Company Name (Max 75 characters)
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* :
We will never spam
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* :
We will never spam
Confirm Email* :
7
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 ›

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

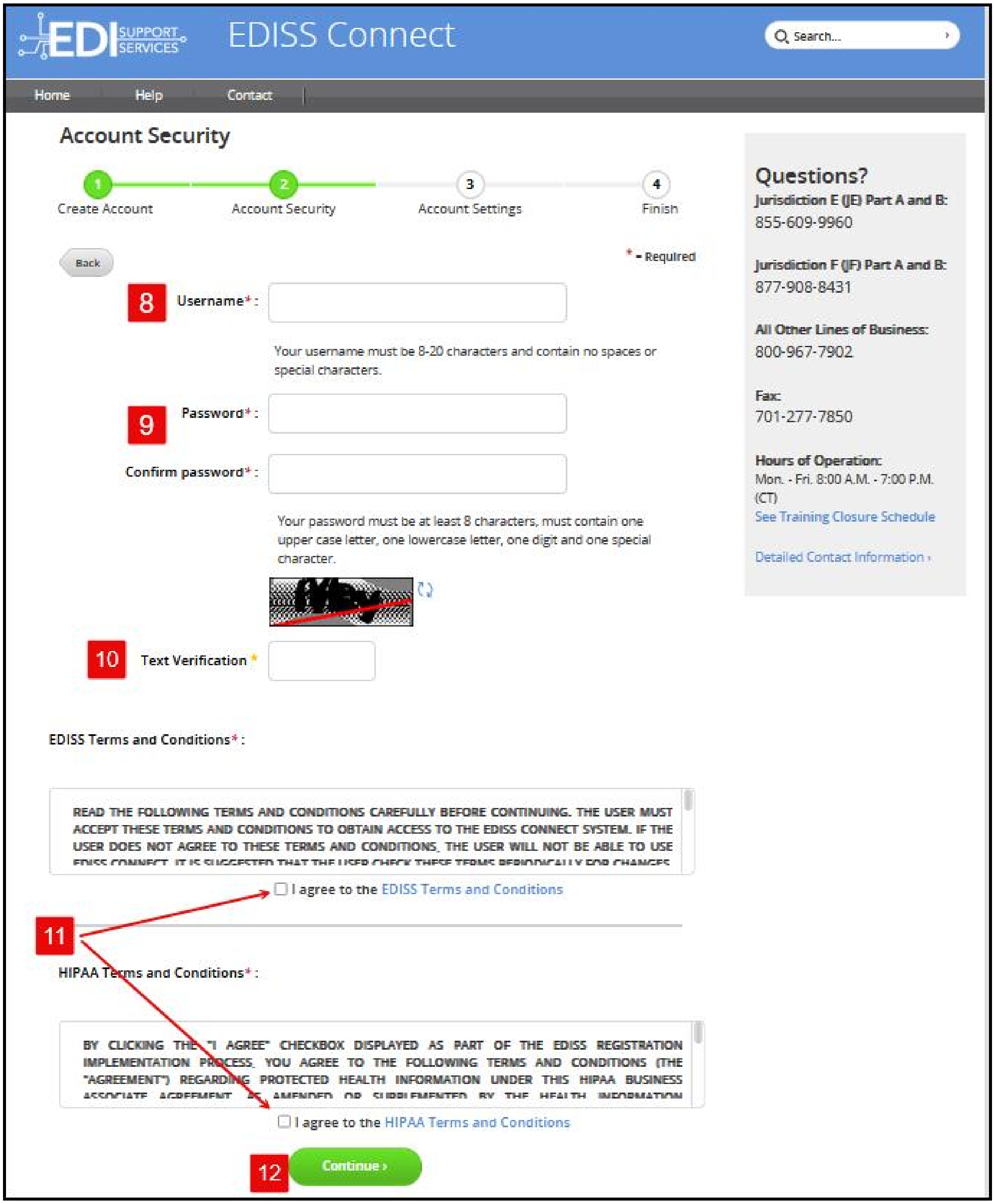
   Then confirm your password.

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.

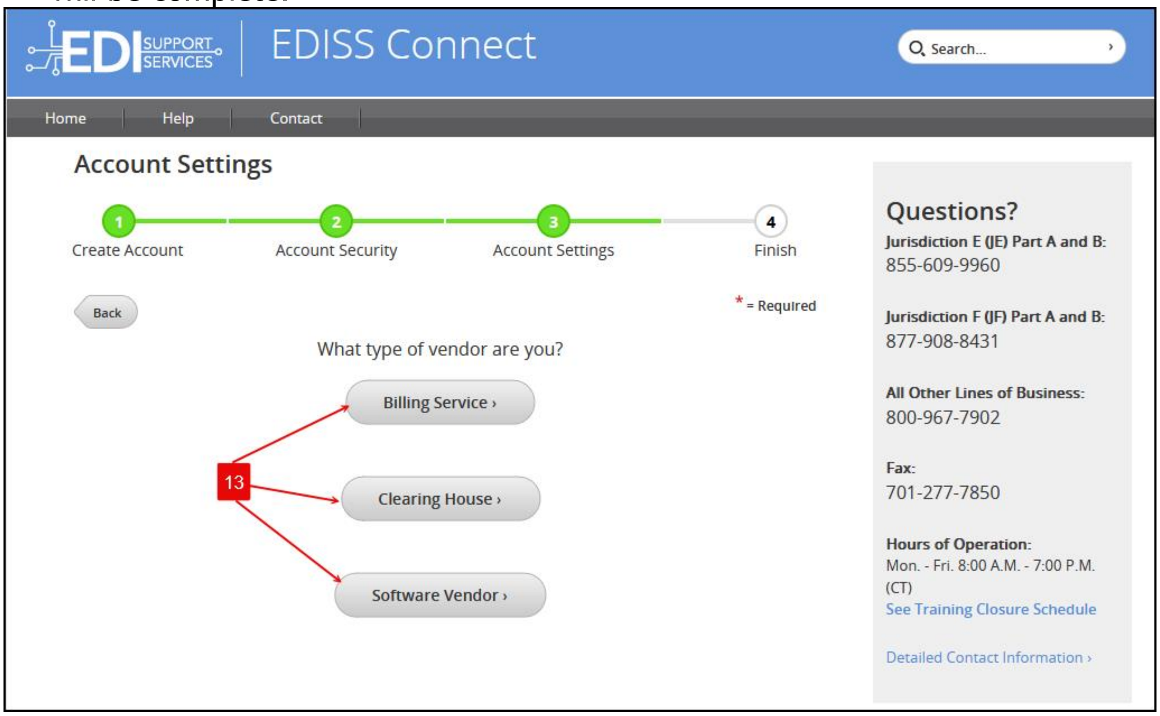
12. Click **Continue**.

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



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**

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



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.

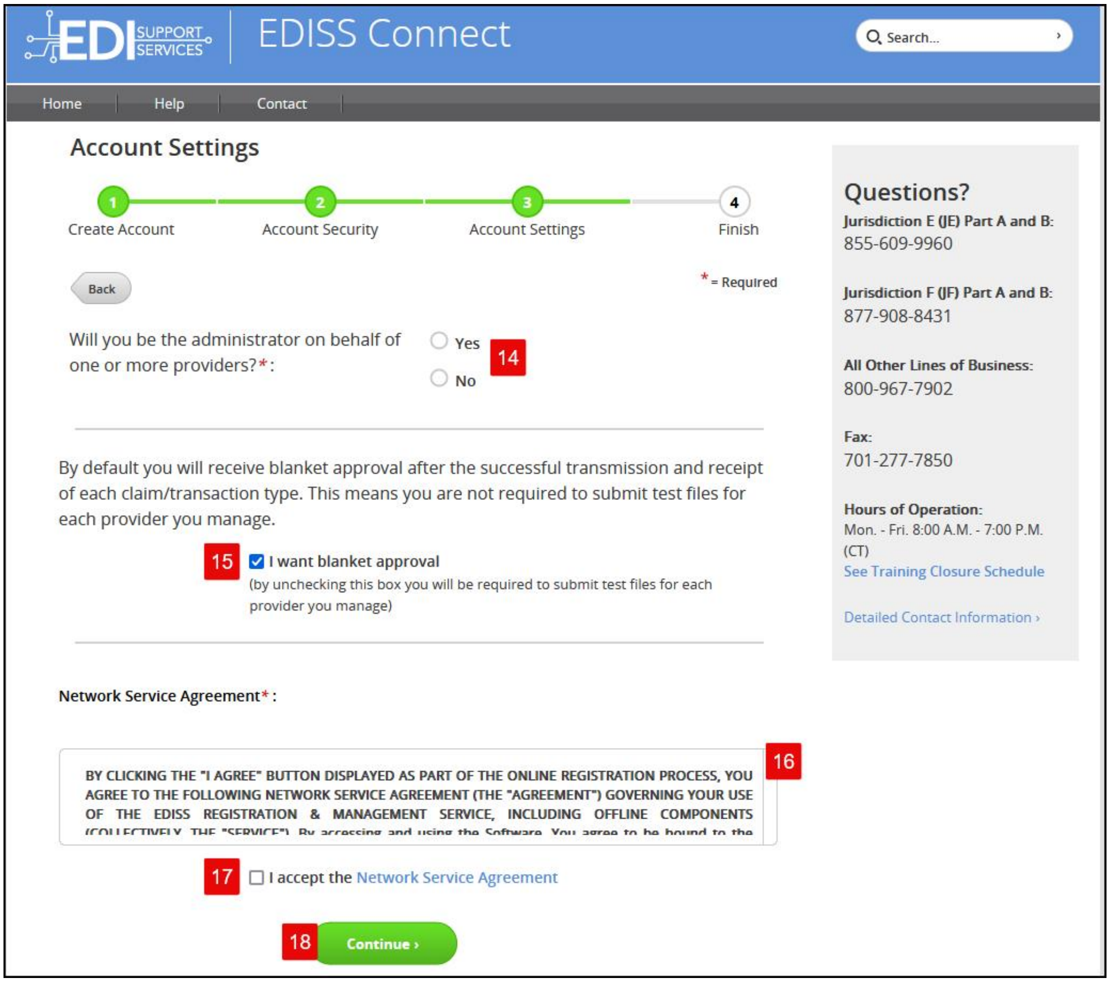
15. The I want blanket approval option is already checked by default. EDISS has specific blanket approval requirements that can be found at http://www.edissweb.com/docs/shared/blanket_approval_criteria.pdf. Once you achieve blanket approval, submission of test files can be bypassed.

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.

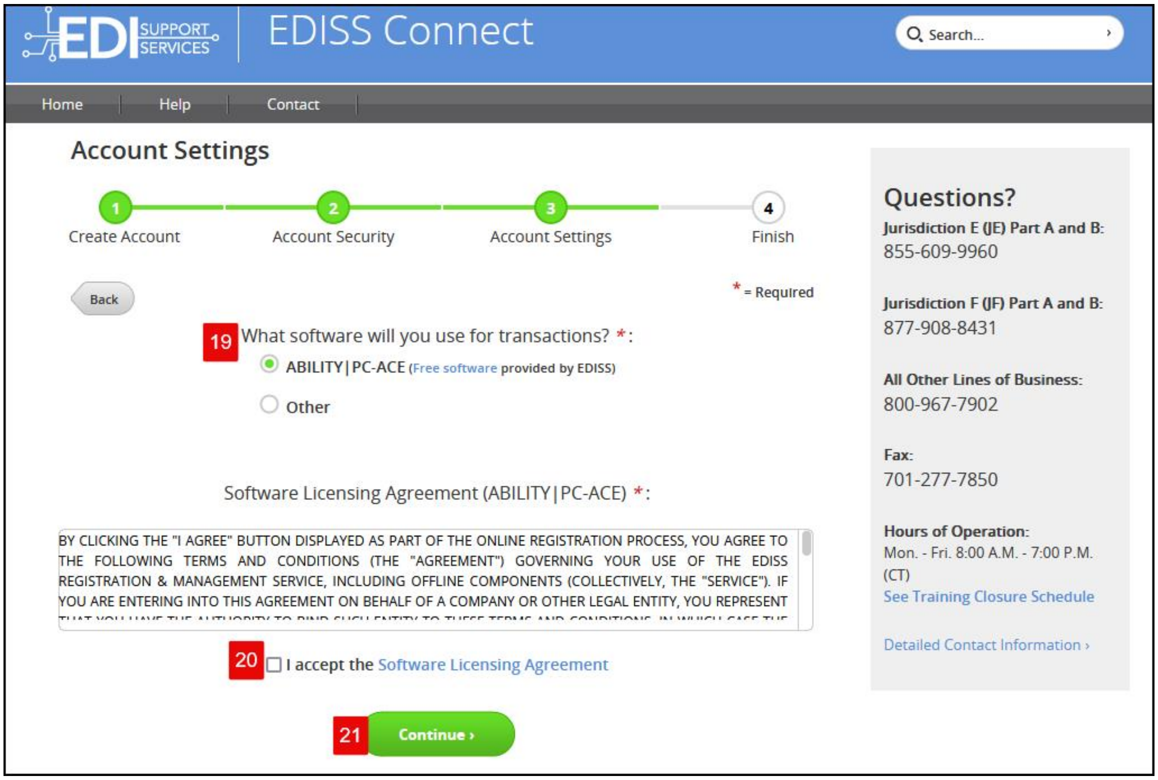
18. Click **Continue**.



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

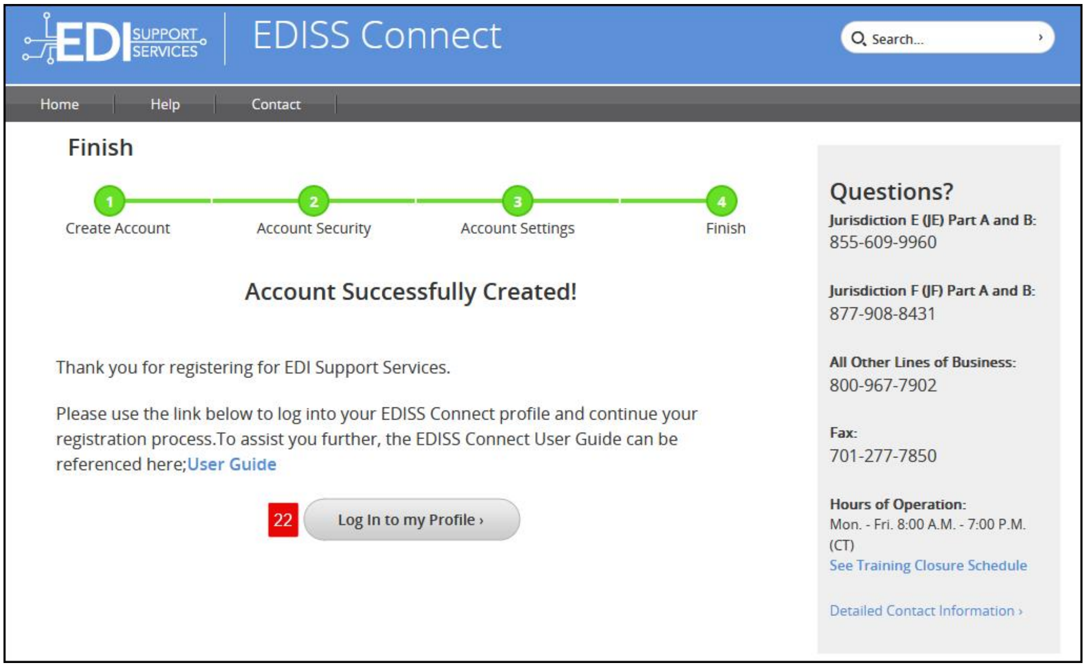
20. If you use ABILITY|PC-ACE, the free software supported by EDISS, you will need to accept the associated software licensing agreement.

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

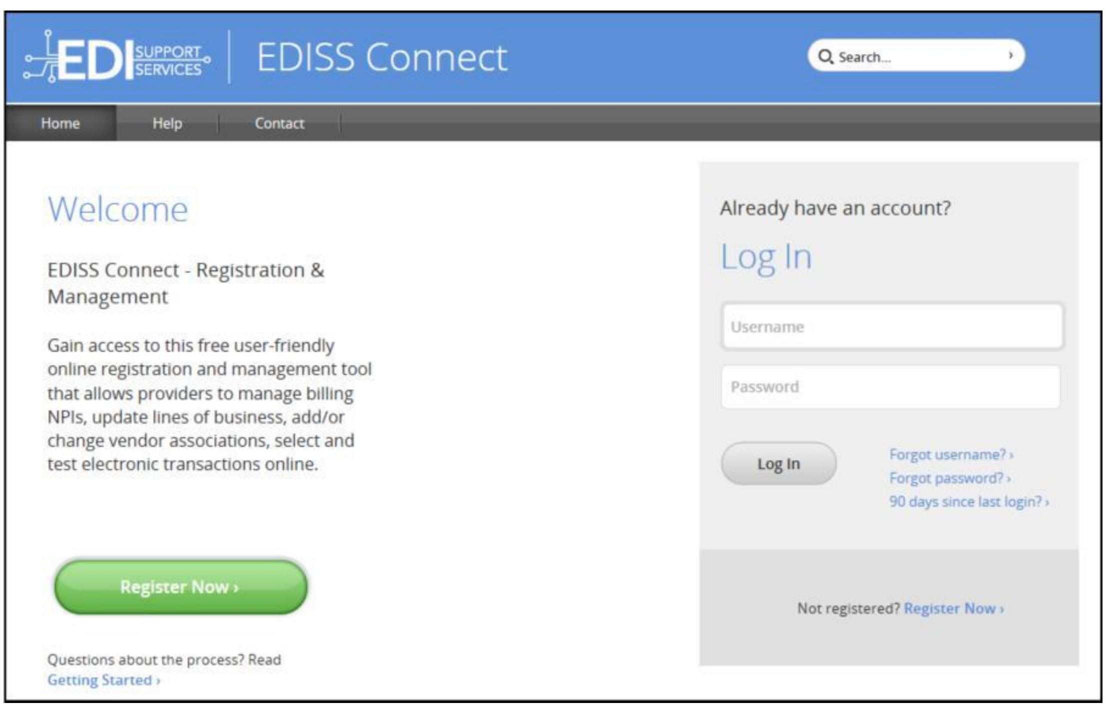


22. Your EDISS Connect account has been created, but you will need to click **Log In to my Profile** to finish the registration process by completing the security questions and adding transactions.

User Documentation for Vendors on EDISS Connect



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.*



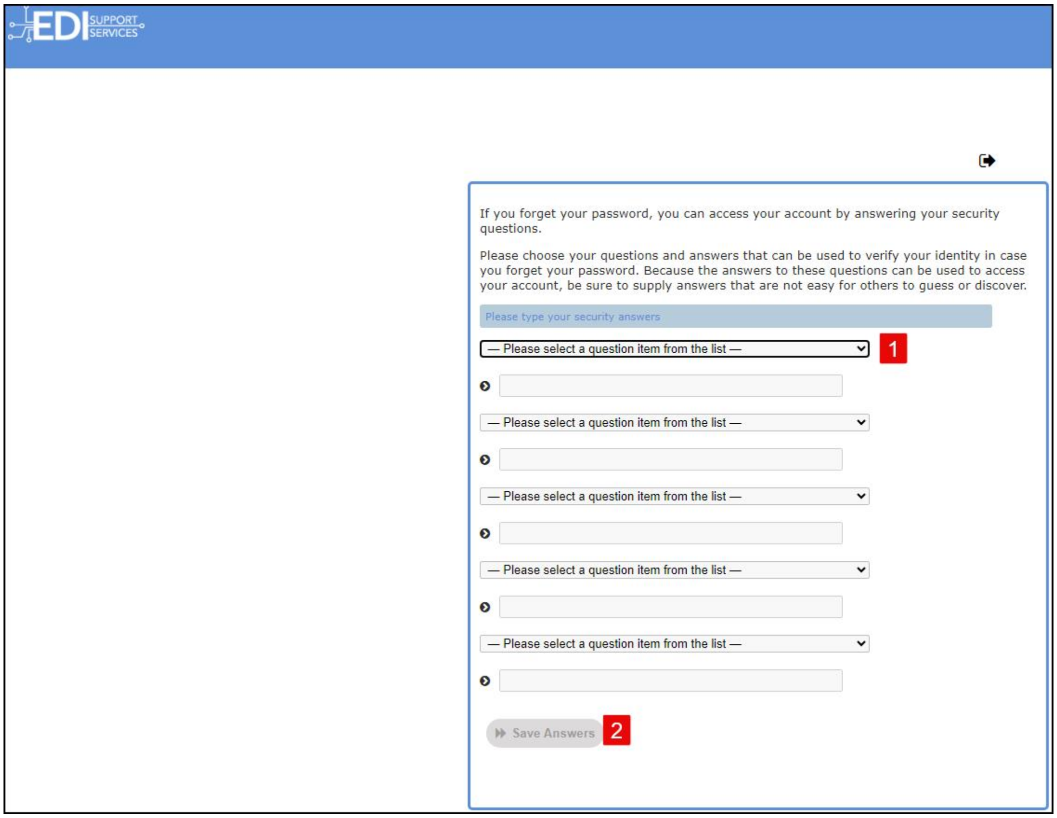
Answer Security Questions

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**.

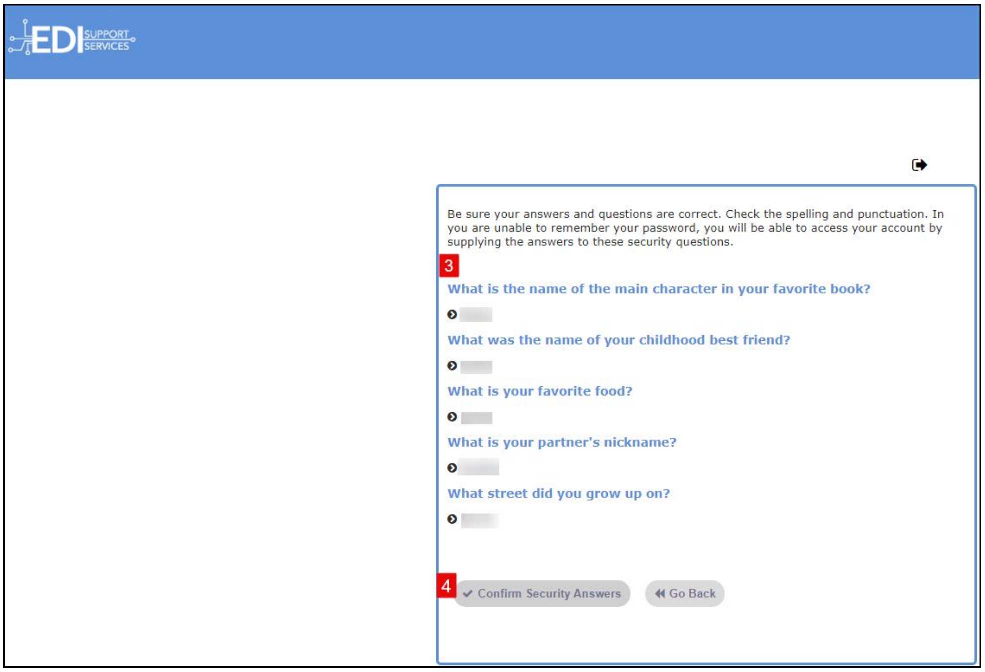


3. After clicking **Save Answers**, you will be taken to a screen where all five security questions and answers are displayed.

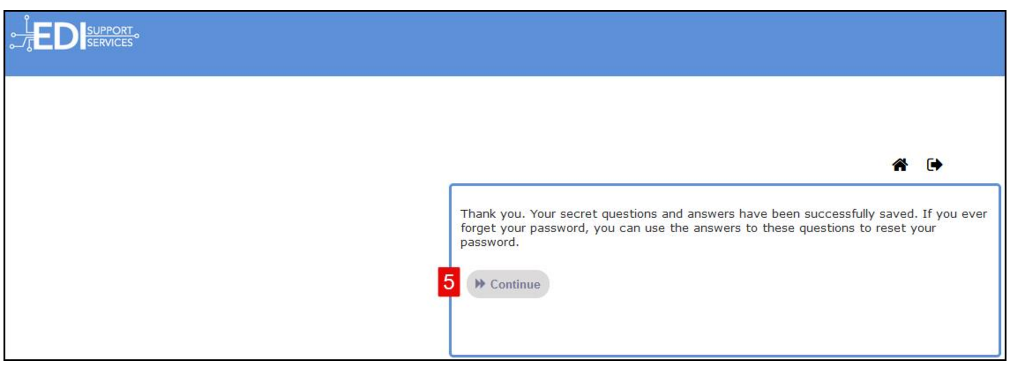
Note: *EDISS strongly recommends that you print this page for future reference and distribute to any staff who will be accessing the account.*

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**.



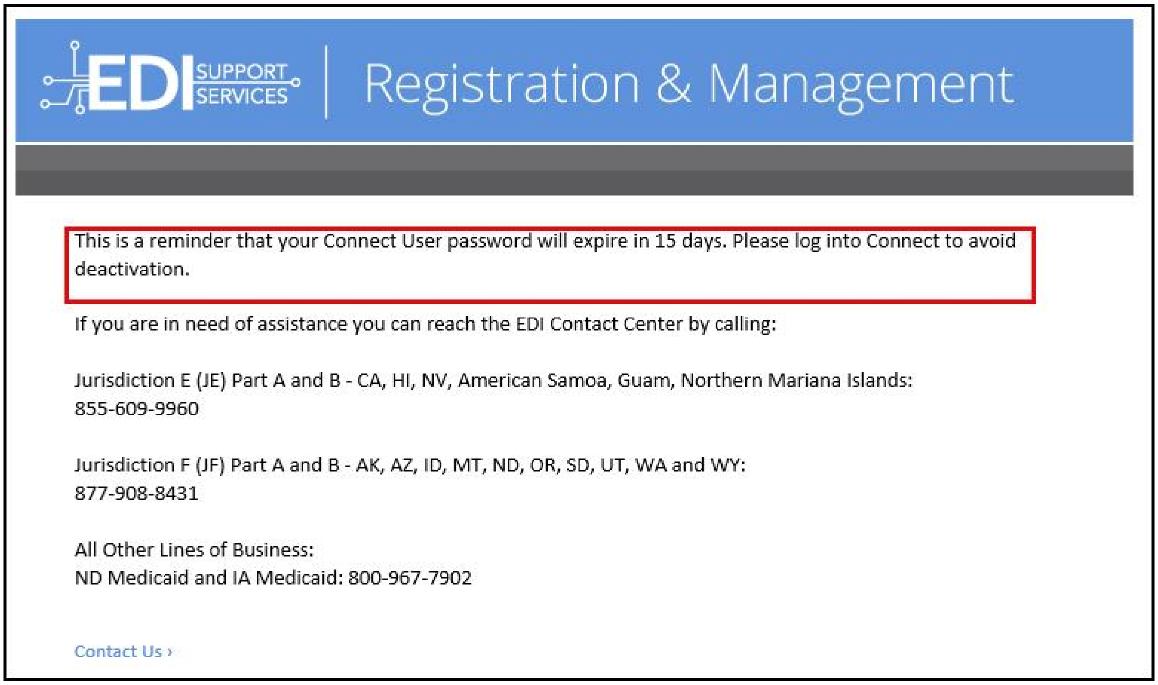
5. Click **Continue** and you will be directed to your Vendor Dashboard.



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)



EDI SUPPORT SERVICES | Registration & Management

This is a reminder that your Connect User password will expire in 15 days. Please log into Connect to avoid deactivation.

If you are in need of assistance you can reach the EDI Contact Center by calling:

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 ›

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)

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.

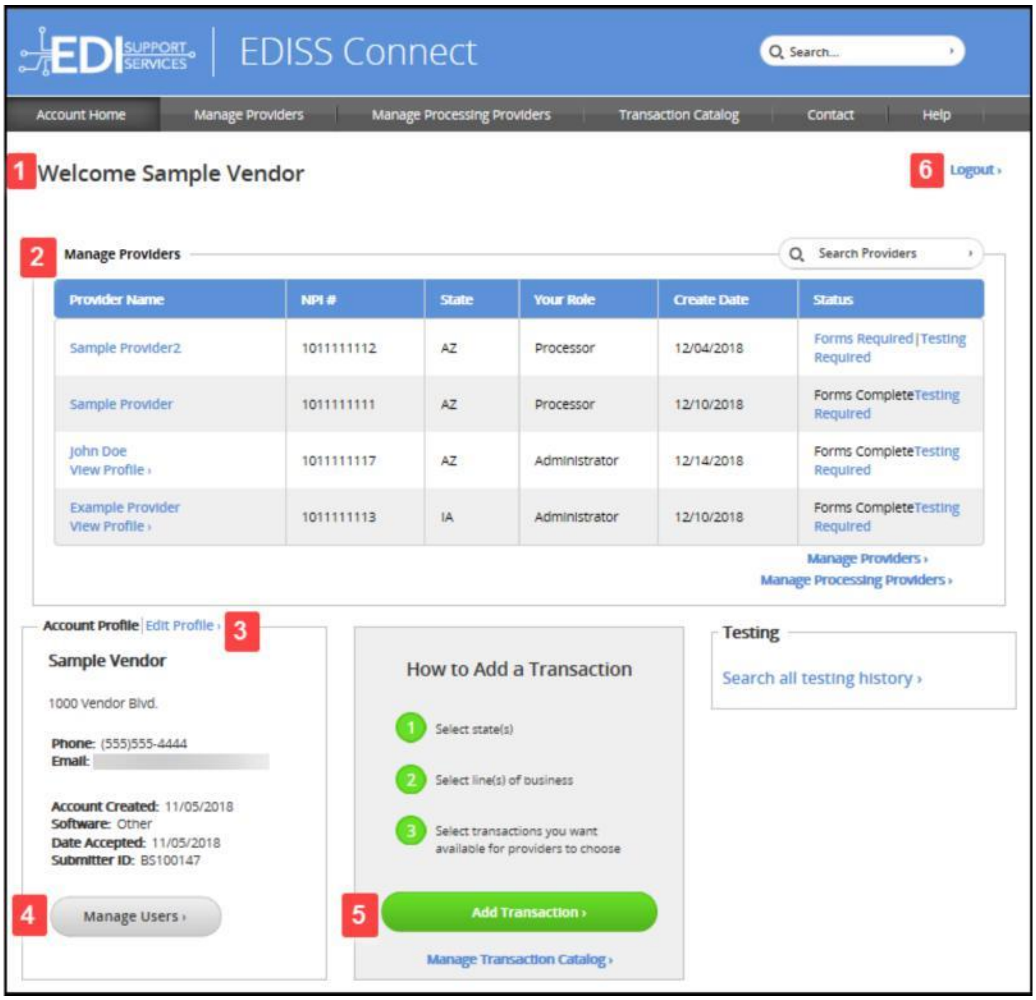
3. To edit your demographic and security information, click **Edit Profile** to be taken to your account details.

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

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

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

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



Transaction Catalog

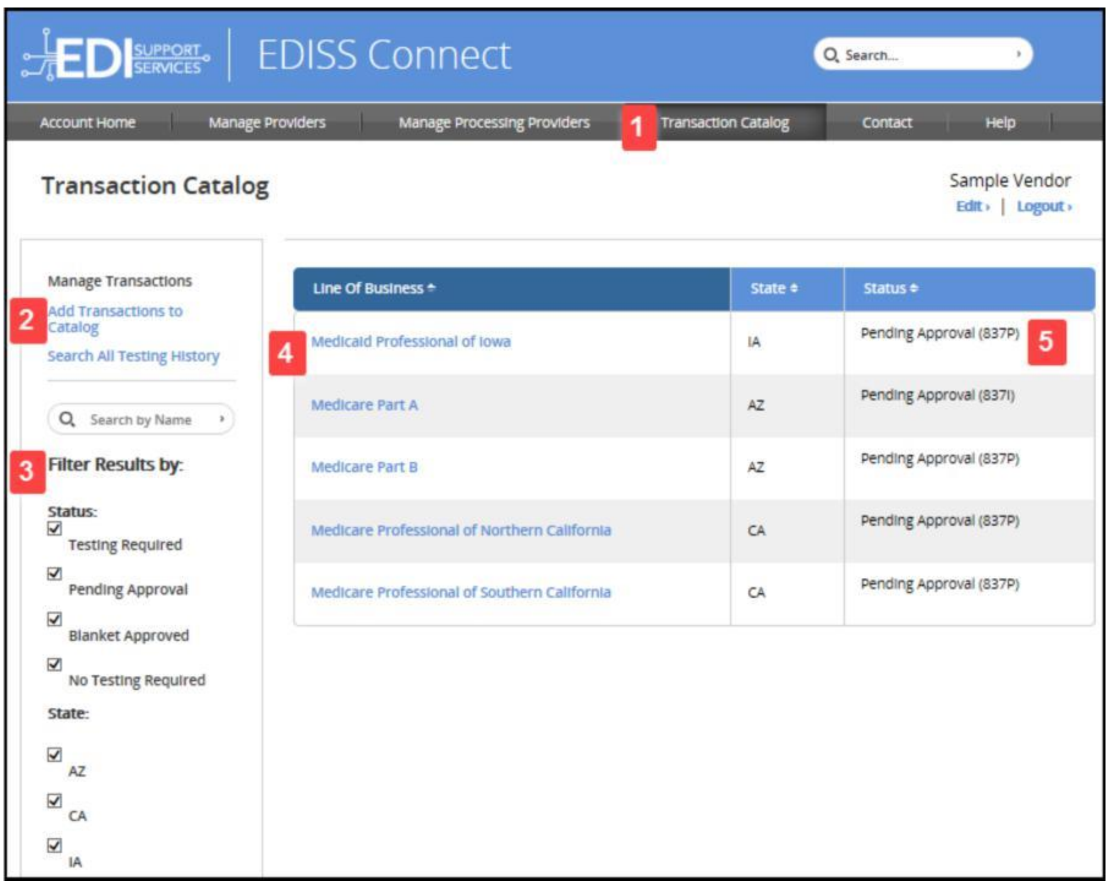
1. The Transaction Catalog is a listing of all transactions associated with your vendor account. To process any electronic transaction for a provider, you must register for that specific state, line of business and transaction combination.

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

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

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

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



Selecting State(s)

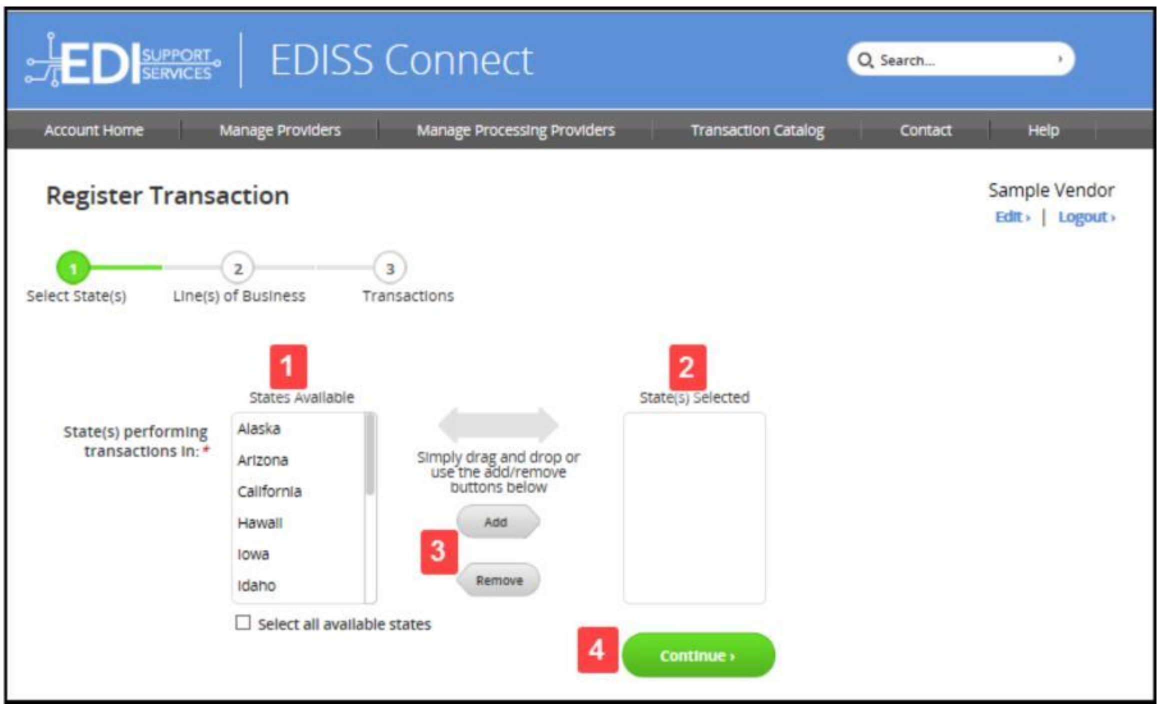
Once you register a transaction, it will be available in your **Transaction Catalog** for providers to select.

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

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

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

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

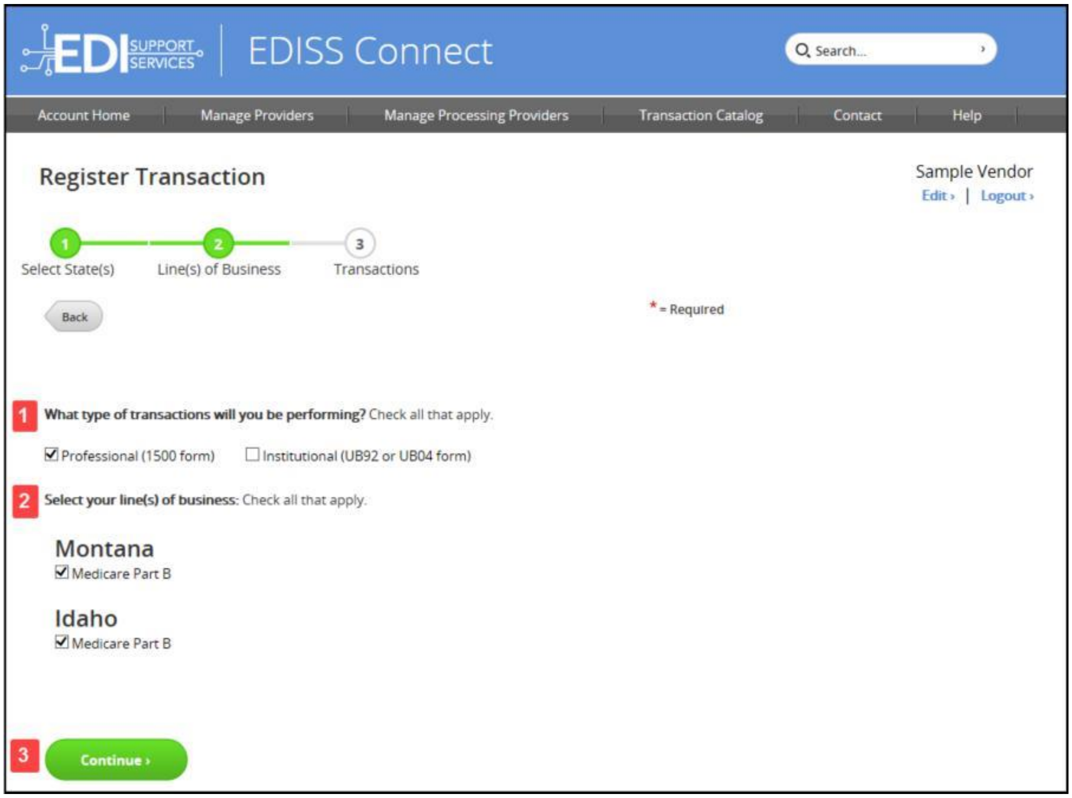


Adding Line(s) of Business

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.

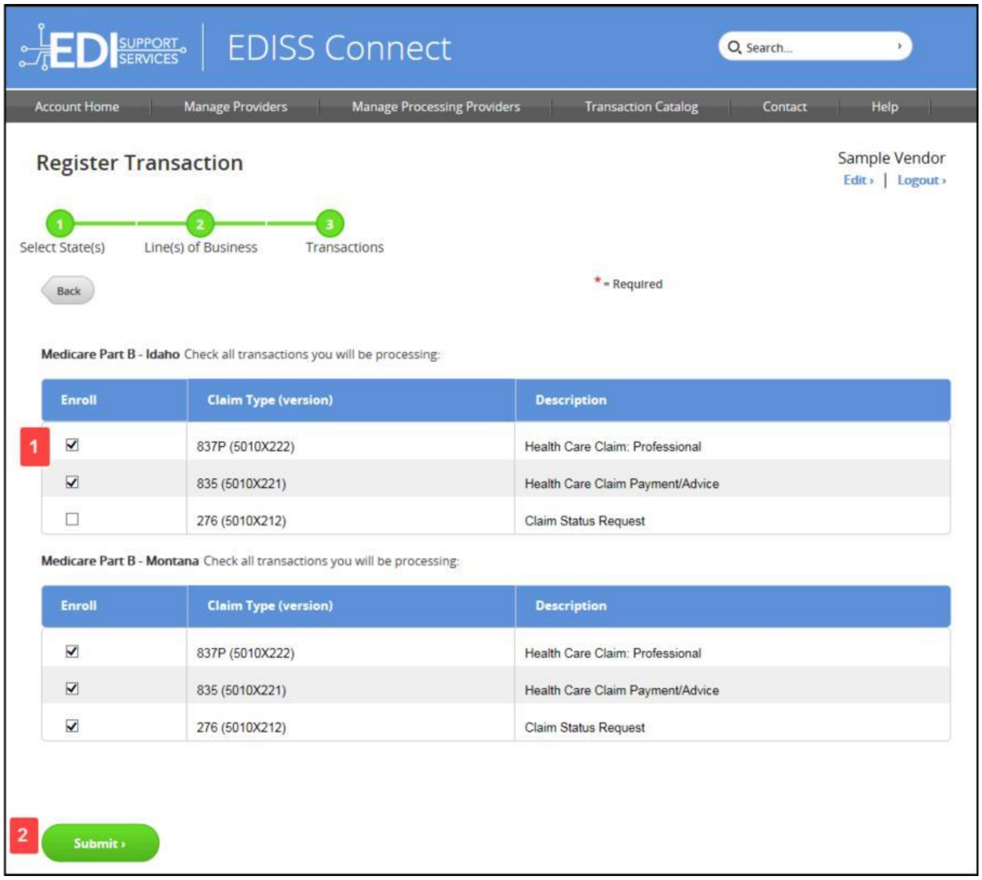
3. Click Continue when all applicable lines of business have been selected.



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).

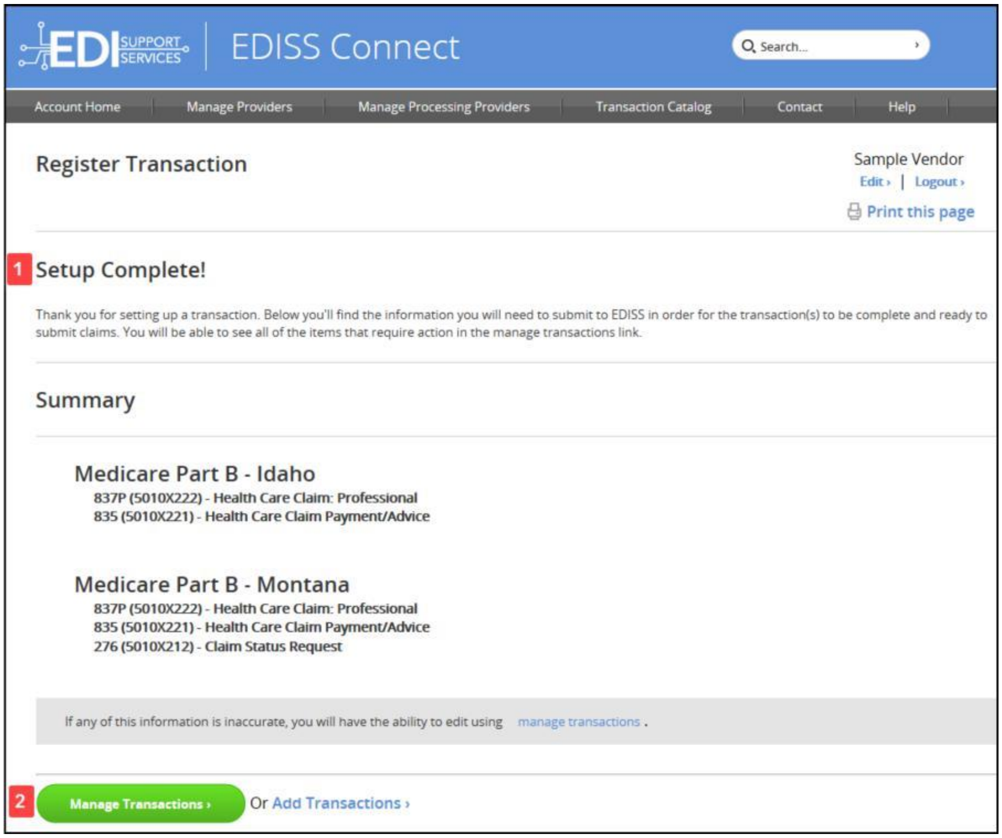


Setup Complete

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.**



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.

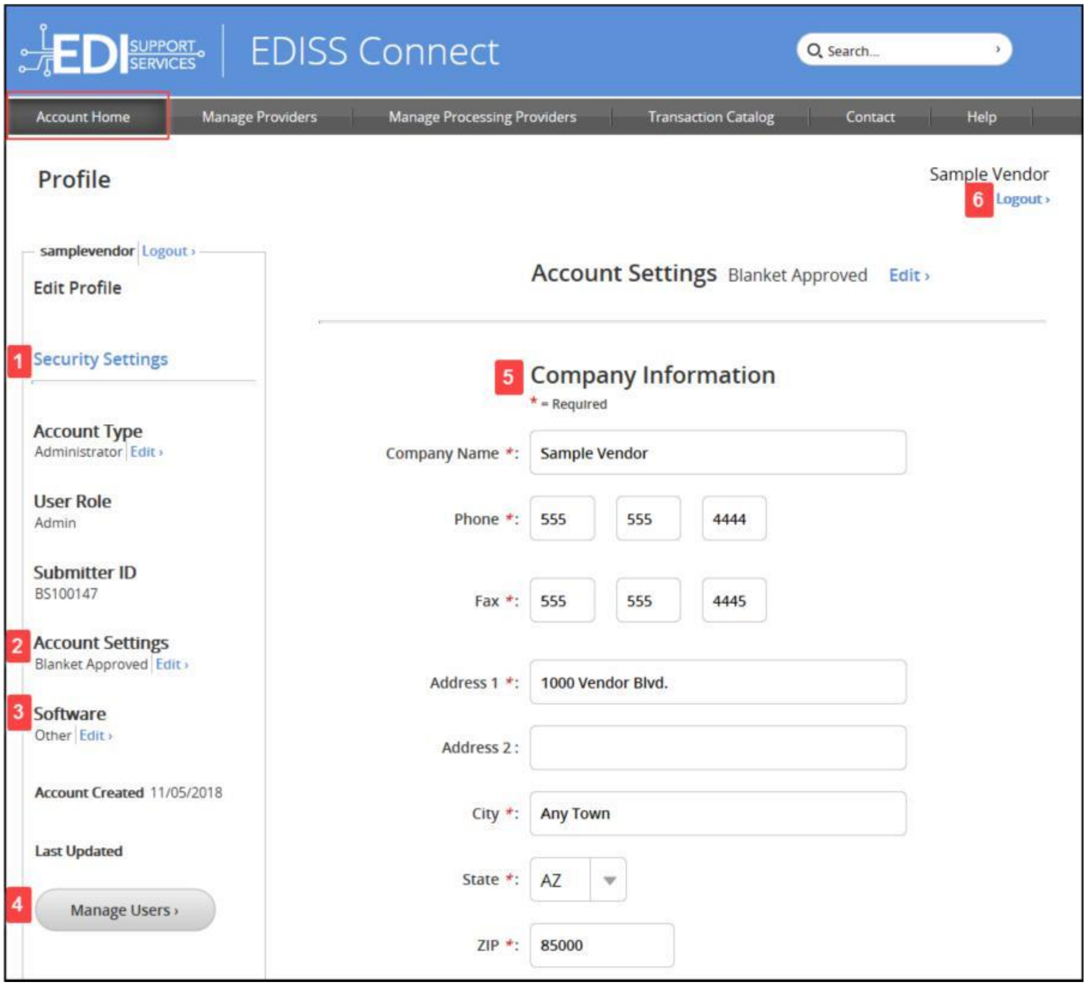
2. **Account Settings** can be set to either Blanket Approval (default) or Testing Required.

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.

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

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



Managing Users

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

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

3. The **Last Login** column shows the date when that user last logged into the system. If the registration is incomplete, the status displays

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

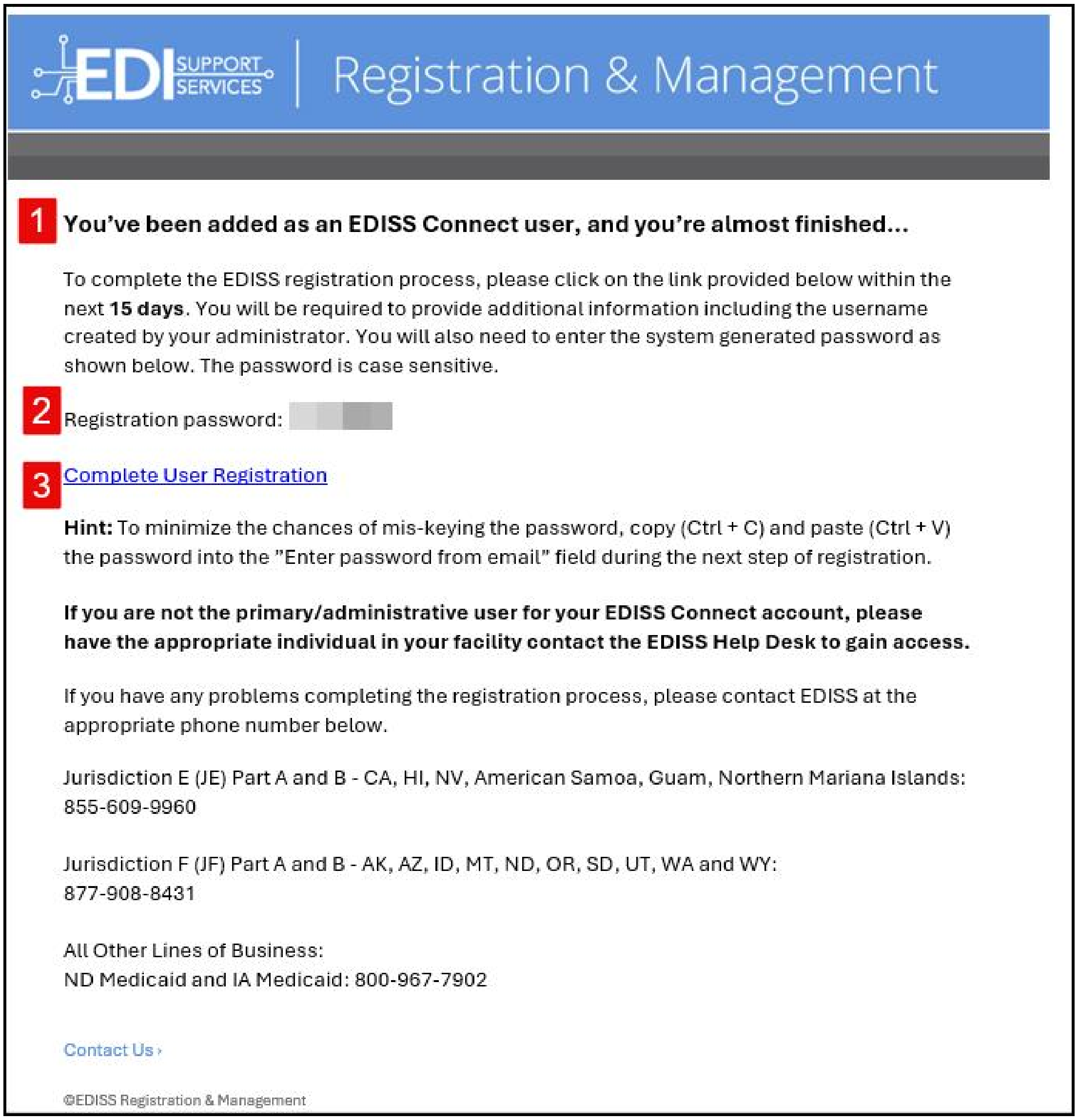
Adding a User

A user can be added to the account by an existing user by clicking **Add User** in the left column or on the Mange 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.



EDI SUPPORT SERVICES | Registration & Management

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.

Registration password:

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 ›

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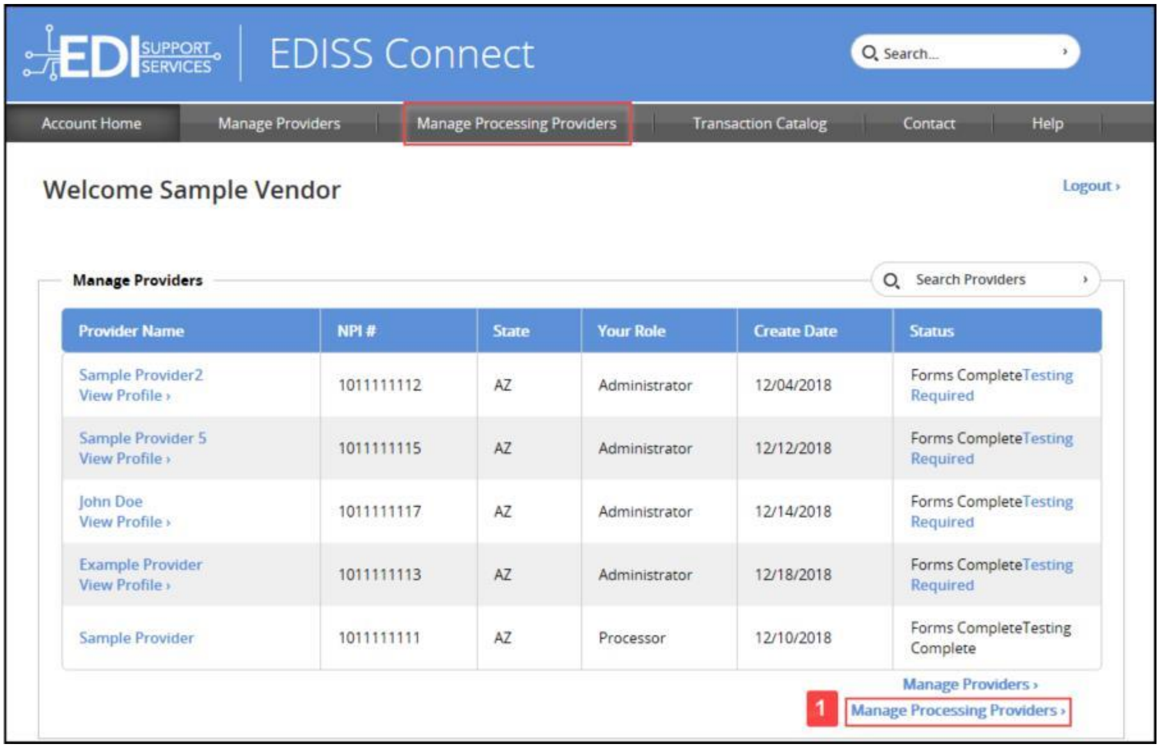
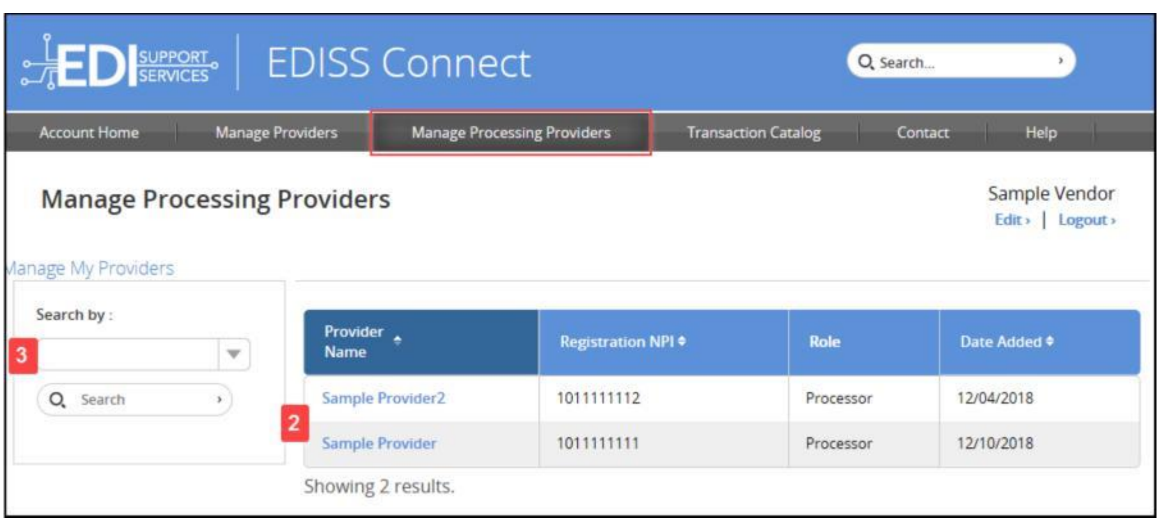
Manage Processing Providers

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



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

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



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.*

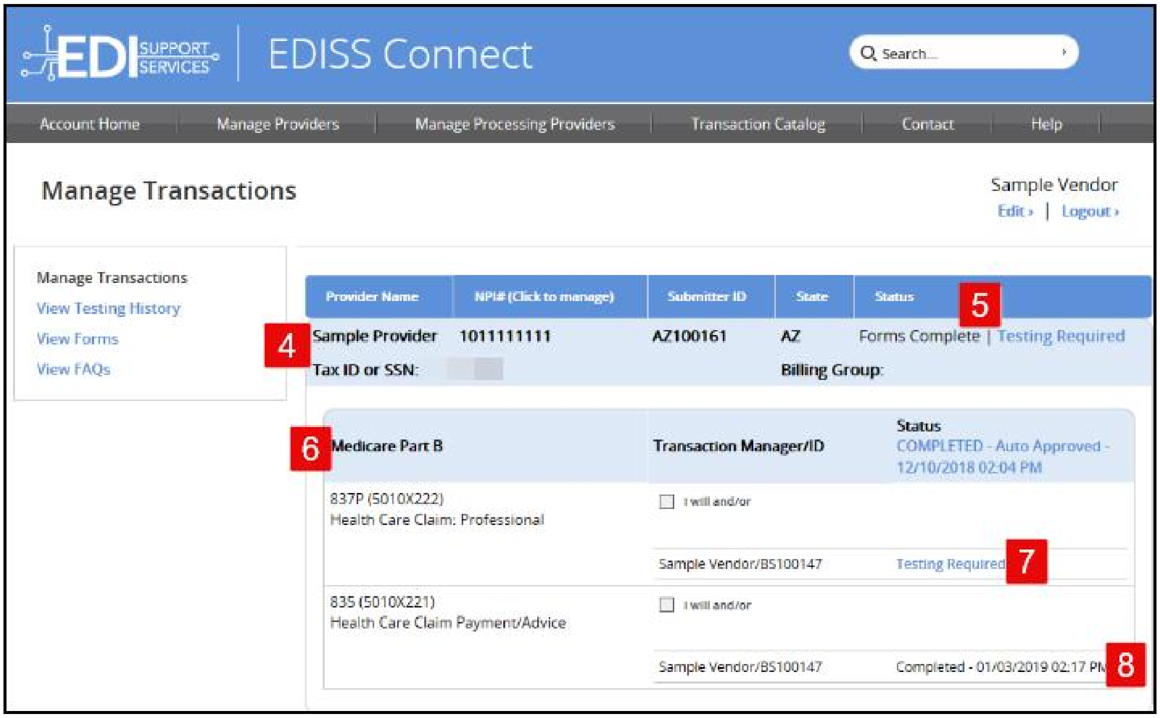
6. The line of business and transaction types the provider selected you to perform are listed below. On the far right, once required forms are accepted and processed for this specific line of business, a date will appear as well as a statement indicating *COMPLETED – Auto Approved.*

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.



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.

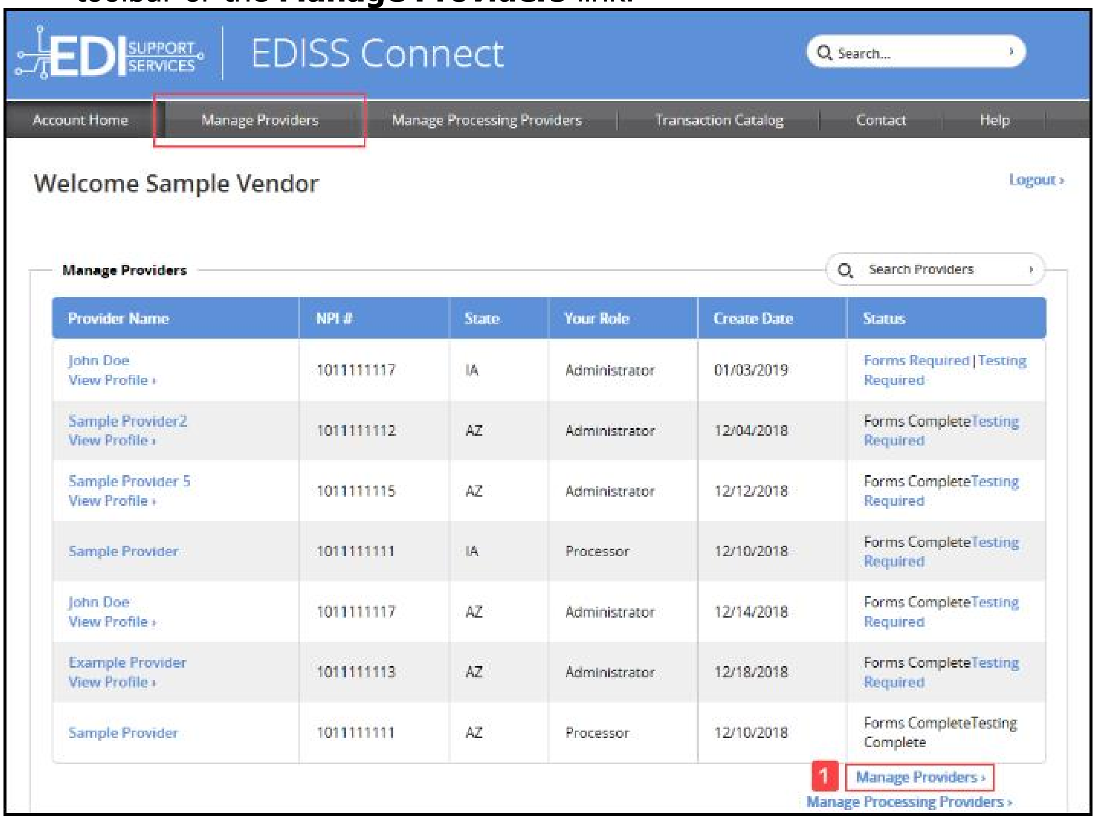
Note: *The provider must accept the required form(s) by logging into their Connect profile. As a Vendor Administrator, you* ***must*** *add the transactions, but they will not be moved into production until the provider has accepted the required form(s).*

Accepting/Rejecting Administration of Providers' Profile

To accept or reject the managing of specific providers:

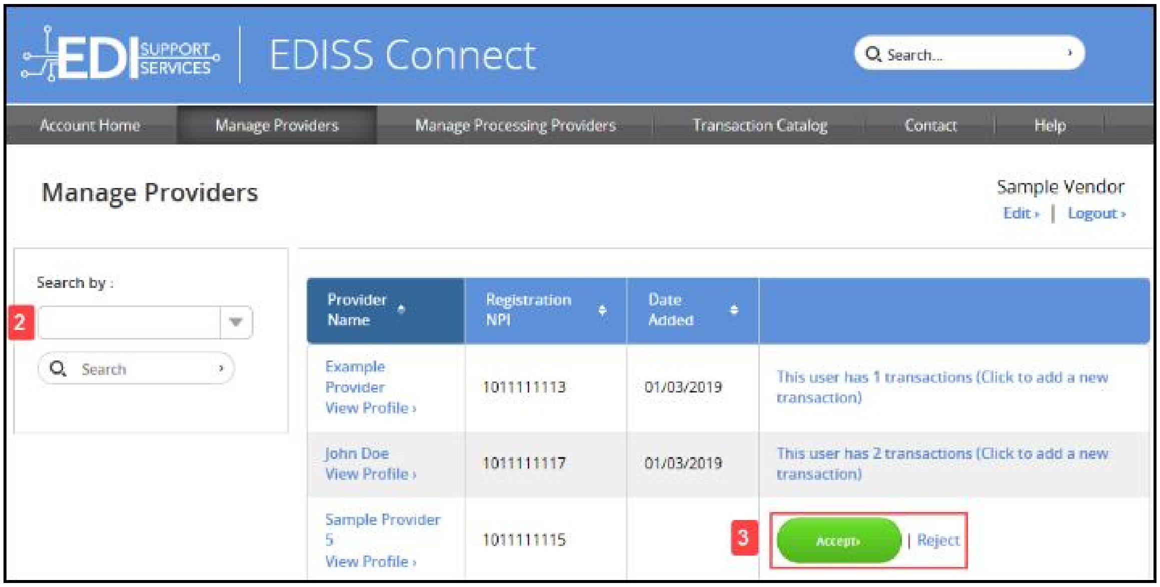
User Documentation for Vendors on EDISS Connect

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



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

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

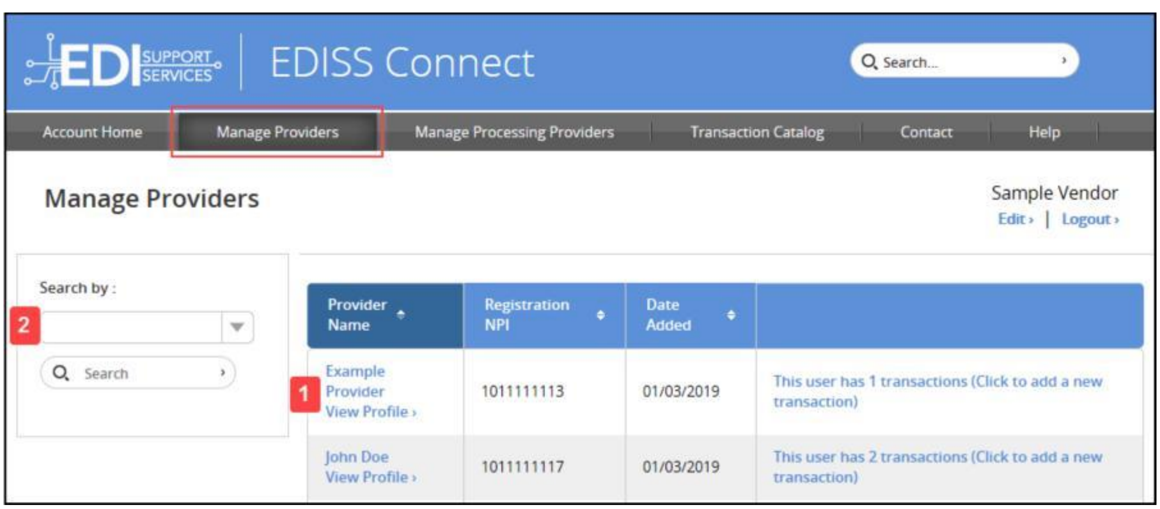


Manage Transactions

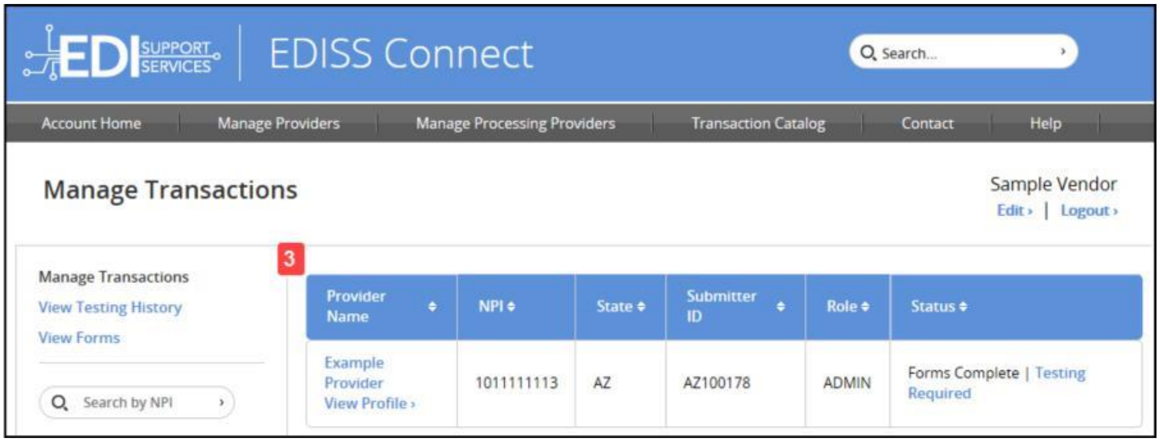
Manage Provider in the main navigation area allows you to view and manage all providers that have selected you as an administrating vendor.

1. Click on the appropriate provider’s name.

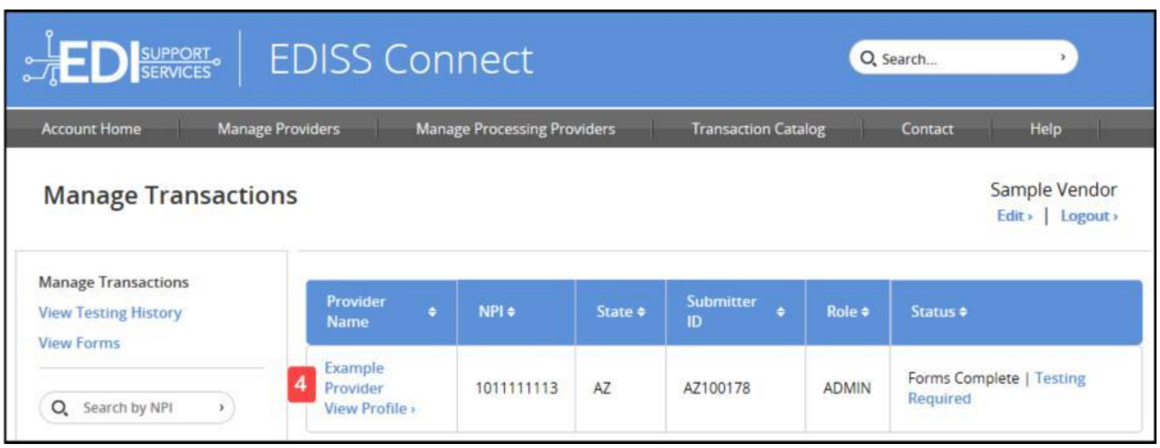
2. You can search by NPI for providers in the display table to the right.



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



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

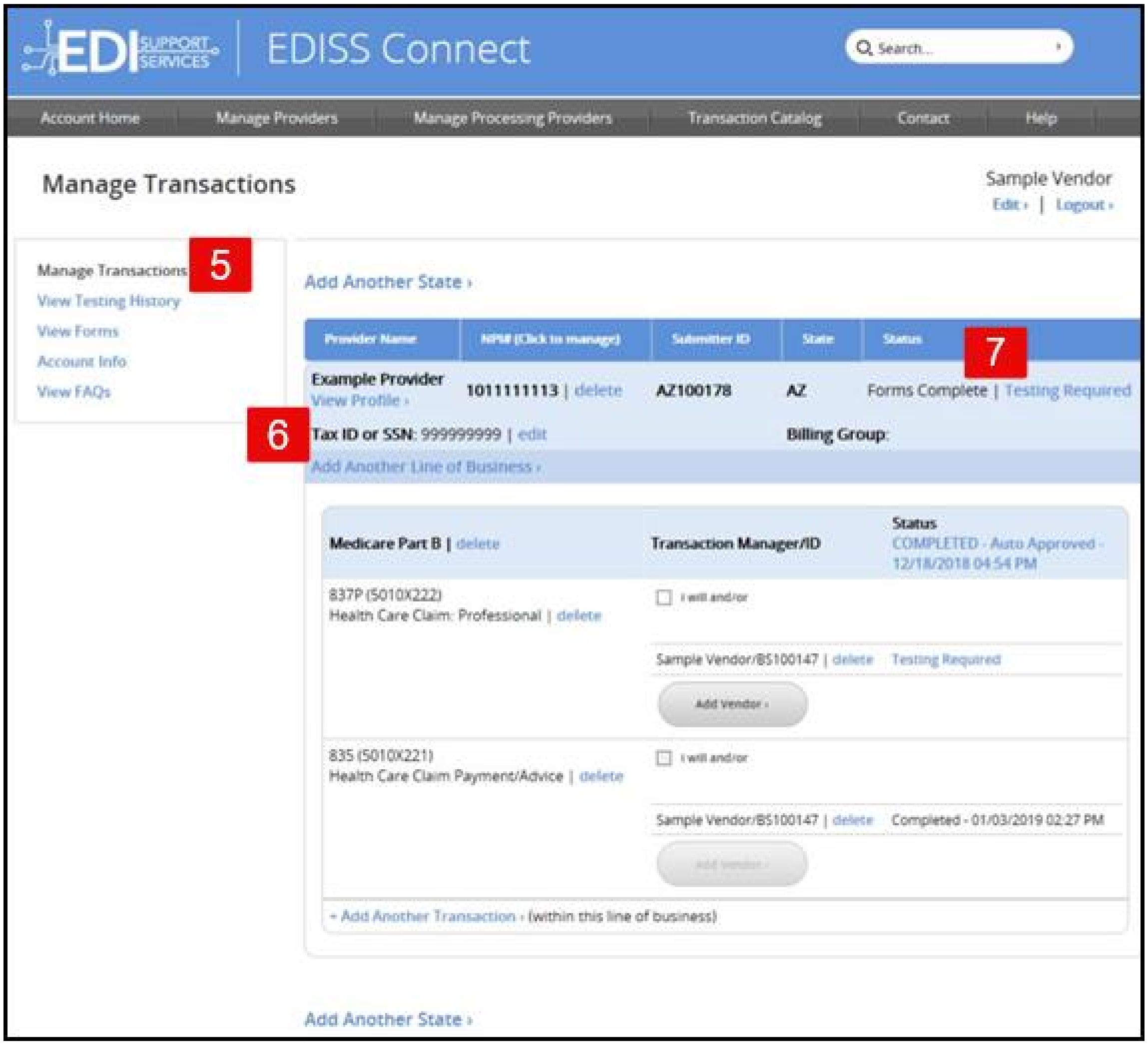


5. Under the **Manage Transactions** section, you can view testing history, forms that are required for the provider and FAQs. You can view the profile of a specific provider, which includes their demographic, security, and user information by clicking on **Account Info**.

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

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

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



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*.

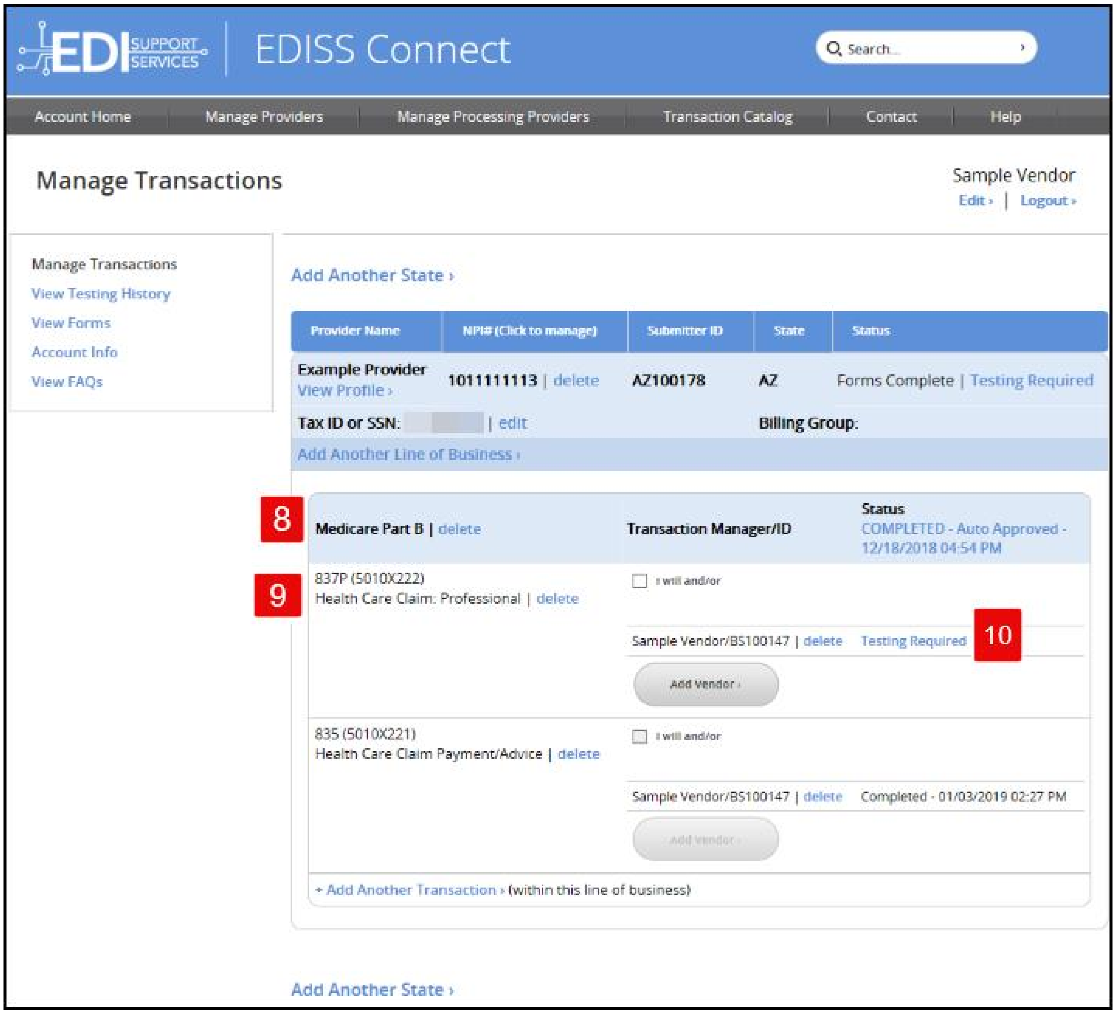
9. Specific transaction types are listed below the line of business with the ability to delete. Removing and reselecting transactions can create delays in the production process.

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.*

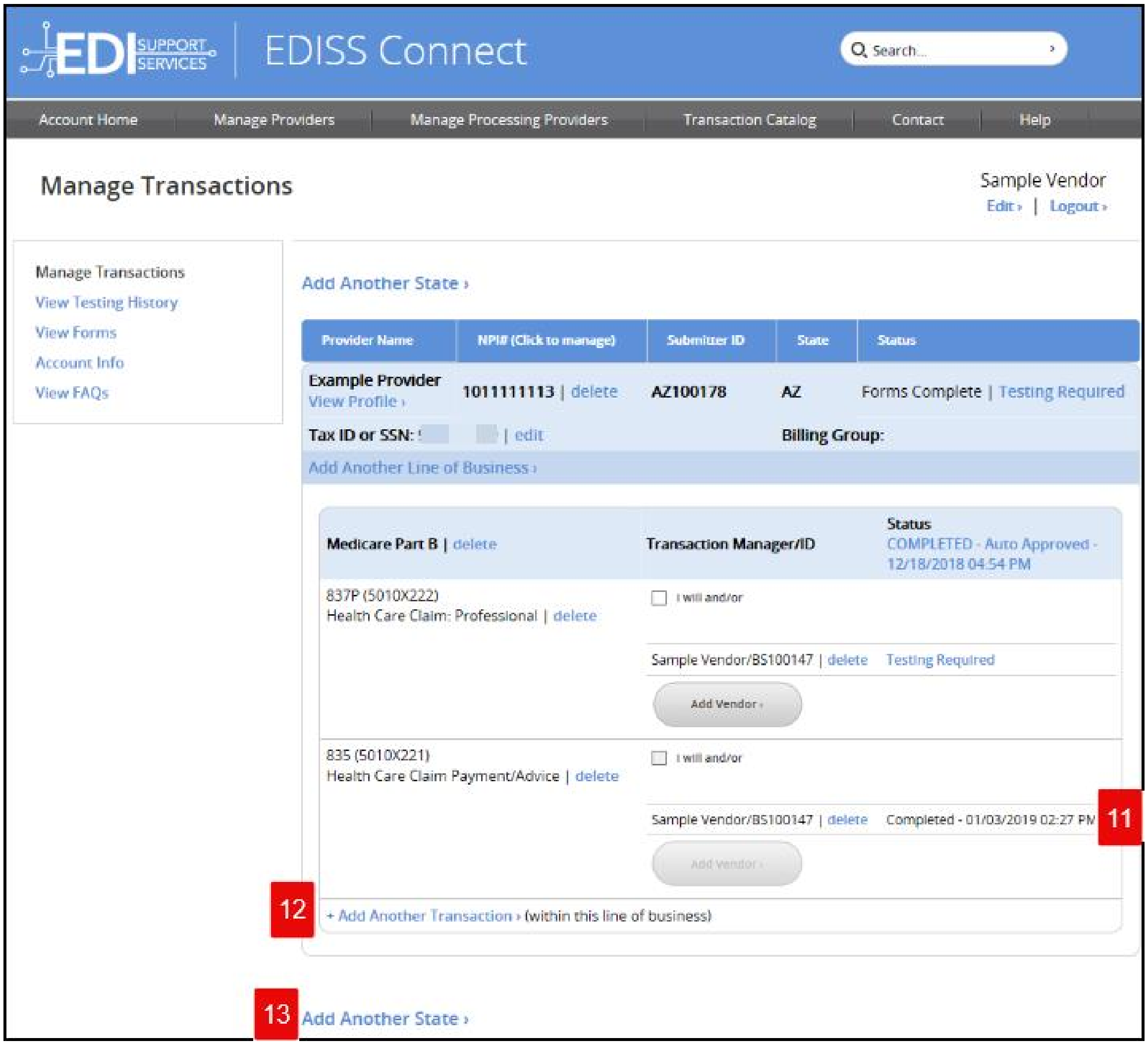


11. For transactions not needing testing or when they have been moved into production, the production date and statement *Completed* will be displayed.

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**.



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.*