CompassConnect

Member Guide

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zelis. TABLE OF CONTENTS

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What is CompassConnect?

CompassConnect allows you to find medical providers in your area who accept your healthcare benefits plan and specialize in a particular type of care. The information available for each provider includes the provider's location, contact information, and quality rating based on how other patients have rated this provider.

Once you have found a provider, you can request assistance to ensure that the provider will accept your healthcare benefits plan, if necessary, get help resolving a balance bill, and determine how much a particular procedure will cost you.

CompassConnect is available from either a desktop or mobile device.

Getting Started

To start using CompassConnect, you will need to set up an account using the following information found on your member ID card:

- ID Number
- First Name
- Group Number
- Date of Birth
- Zip Code

Each family member should set up an account within CompassConnect to ensure confidentiality of information.

To set up your CompassConnect account

- 1. Have your member ID card available.
- 2. Access the CompassConnect website using the URL provided by your health plan administrator.





gn In screen (desktop)		
G Sign Up		
	Sign In	
	Account Email	
	Password	Show
Payer Compass		
Next-Gen Pricing Transparency and Contracting Solution	No account yet? Cre	eate an account now

3. Click on **Create an account now** to begin the registration process, which consists of providing some basic information about yourself, setting up your user ID and password, and then confirming this information.





Personal Information screen (desktop)

	Personal Info	ormation	
Registration process	First Name	🛱 Birth Date	
Your basic information	Id Number	() Group Number	(
2 Account Information Account details with which you will log in	Zip Code		
3 Confirmation Confirmation of registration with the information you provided	Back		

- 4. Enter your personal information as found on your member ID card.
- 5. Click Continue.

Note: If your personal information is not found in our system, you will receive a message to confirm the information you have entered and try again. If you are unsuccessful, please call your health plan administrator.



Account information screen (desktop)

gistration process Personal Information Vor basic information Count Information Count details with which you will be information Confirmation Confirm password Show Confirm password Show Back	Sign Up		
Personal Information Vour basic information Account Information Account details with which you will bg in Confirmation Confirmation of registration with the information you provided Password More than 7 characters At least 1 number(s) Show Back	Registration process	Account information Enter the data that will be used to login in the future.	
Account Information Account details with which you will log in Confirmation Confirmation of registration with the information you provided Account Email Account Password Password Show O More than 7 characters At least 1 number(s) At least 1 symbol(s) Confirm password Show Back Continue	Personal Information Your basic information	Phone Number	
Account Password Confirmation Confirmation with the information you provided Account Password Password More than 7 characters At least 1 number(s) At least 1 symbol(s) Confirm password Back Continue	2 Account Information Account details with which you will log in	Account Email	
Confirmation Confirmation of registration with the information you provided Password Show More than 7 characters At least 1 number(s) At least 1 symbol(s) Confirm password Show Back Continue		Account Password	
you provided O More than 7 characters O At least 1 number(s) At least 1 symbol(s) Confirm password Show Back Continue O	Confirmation Confirmation of registration with the information	Password	Show
Confirm password Show Back Continue ③	you provided	 More than 7 characters At least 1 number(s) 	At least 1 symbol(s)
Back Continue 🛞		Confirm password	Show
Back Continue 🕤			
		Back	

6. On the **Account information** screen, enter your phone number, your email address, and a password.

Note: The email address and password you enter during the registration process will be your CompassConnect login credentials. All notifications from CompassConnect will be sent to this email address.

7. Click **Continue**. You will receive an email asking you to confirm your account.

Email to confirm account

From ccdemo@payercompass.com 🏚	5 Reply	→ Forward	Archive	👌 Junk	Delete	More 🗸
Subject Please confirm your CompassConnect account						9:50 AM
To Met						
This is an automated message generated by your account activation request.						
Please do not reply to this message as it is sent from an unmonitored mailbox.						
If you did not request to activate your account please contact CompassConnect Demo (CCDEMO) support immediately.						
Please follow this <u>link</u> to activate your account. If above link does not work, simply paste this url into your web browser: https://demo.connect2.payercompass.com/register/verifyemail?token=ht0heukgsltq3zxiyurn50kb1wf3lhitx						
Thank you.						







8. Click the link in the email to activate your account. You will receive a message that your account has been activated.



You are now ready to use CompassConnect.

To access your CompassConnect account

- 1. Use the URL provided by your health plan administrator to access the CompassConnect website.
- 2. Sign in to your account using the email address and password you provided during the registration process. The **Welcome** page's **Dashboard** will appear.





Note: The first time you sign in to your CompassConnect account, you will be asked to agree to the service disclaimer. You must click **I Agree** to use the application.







From the **Welcome** page's **Dashboard**, you can search for a provider (See Searching for Providers on page 12).

Welcome	A In Progress	A In Progress	Balance Bill Help	\bigcirc	
33 updates on your current cases	Advocacy - 23094039 Find Acupuncture provider	Balance Bill - 23004040 Balance bill request	If you were sent a balance bill for medical services covered under your	Welcome 13 updates on your current cases	
Show all	Jane Doe 04/20/1960 Updsterd 4d 4h 7m 🗈 0 💭 2	Jane Doe 04/20/1960 Updated 02/24/23 D 1 D 1	we're here to help: Cet Help	In Progress Advocacy Outreach request with CLARENCE BROWN	Advocacy Outreach DAVID H
Find a provider Q. Doctor Name, Medical center, Specialty, Procedure etc			Search	M.D. Jane Doe 04/20/1950 Updated 2d 1h S3m 🗈 0 🕞 2	Jane Doe 04/20/1960 Updated 07/08/22
4700 NW 82nd Terrace, Kansas City, MO 64151, USA				Find a provider	
				Q Name, Medical center, Specialty, Pr	ocedure
ipecialty Procedure					
rocedure	-	0.		O Location	

To reset your CompassConnect password

You can reset your CompassConnect password by clicking **Forgot Password** on the **Sign In** screen.

- 1. On the **Sign In** screen, click **Forgot Password**. The **Please enter your email screen** appears.
- 2. Enter the email address associated with your account.
- 3. Click Send Email. You will receive an email with a link to reset your password.

Email with link to reset password



4. Click on the link inside the email. The **Please enter your new password** screen appears.





Enter new password (desktop) $\overline{}$ Sign Up Please enter your new password Password **Email information** Show ⊘ More than 7 characters ⊘ At least 1 number(s) ⊘ At least 1 symbol(s) Confirm password Enter new password 2 Show Confirm password reset Set New Password ③

- 5. Enter your new password ensuring that it follows the minimum requirements provided.
- 6. Confirm your new password by entering it again.
- 7. Click **Set New Password**. You will receive confirmation that your password has been changed.





Password changed successfully (desktop)	
Sign Up	
	Password changed
Password reset	Your password has been updated successfully. Press continue to log into the system.
Email information Please, enter your email	Continue
Enter new password Enter new password	
3 Confirm password reset Confirm password	

8. Click **Continue** to log in using your new password.

Managing Your Account

Initially, your account profile consists of the email address you entered during the registration process. If desired, you can add a phone number to your profile and manage whether you receive account notifications via email, text, or both. By default, you will receive account notifications via email for all cases you initiate.

Through your account profile, you can also change your account password.

To update your phone number or email address

1. On the **Welcome** page, click **Account**.





ome pag	ge (desktop)						
\bigcirc	Dashboard —	Provider Search				Account A	Log out 🕥
Wel	come						
	ovider						
nu a pi	ovider						
Q Doctor Na	ame, Medical center, Sp	eciality, Procedure etc					
202 Rugg	ed Dr, Red Oak, TX 751	54, USA		+ Select memb	er group		
eciality Pr	ocedure						
		\$		<u>~</u>	(<u>U</u>)		
Dentist	Dermatology	Endocrinology	Gastroenterology	Neurology	Home Health Care	Ophthalmology	 Show All

2. On the **Profile** screen, update your phone number or email address. The **Save Changes** button will be activated next to the information that you update.

Account	Profile		
Profile	Account Phone		
Notification Management	The phone number used to contact you and receive notifications	(999)999-9999	Save Changes
	Account Email		
	Email used to login and receive notifications	Account Email connectdemo01@payercompass.com	Save Changes
	Account Password		
	Password used to login to system	Current Password	Show
		New Password	Show
		More than 7 characters At least 1 number(s)	At least 1 symbol(s)
		New Confirm Password	Show



3. Click **Save Changes**. The **Confirm your account** screen will open so that you can enter the confirmation code that was sent to your phone or your email address, depending on the contact information being changed.

nfirm	ation o	code						
9	0	1	3	2	5			
e code	has not	been sent, p	lease make	e another re	equest or select	another metho	od of confirmation.	
	send co	nfirmatio	n					

4. Enter the confirmation code and click **Validate**. Then, log out for the changes to take effect.

To update how you receive notifications

1. On the Account screen, click Notification Management.

Account screen with Notification Management selected (desktop)

Dashboard	Provider Search	Support	:	Account	Log out 🧿	
Profile Notification Managemen	Email/S Enable this sett SMS Enable this sett cases.	SMS Notification	TS tifications whenever updates are made to your Patie e notifications whenever updates are made to your P	nt Advocacy or Balance Patient Advocacy or Bala	Bill support cases.	

2. By default, you will receive notifications via both email and text (if you have a phone number associated with your account). Click to set either **On** or **Off**, depending on your preference.







3. Click Save Changes.

To reset your CompassConnect password

You can reset your CompassConnect password through your account profile.

1. On the **Profile** screen, enter your current password.

```
Resetting account password (desktop)
```

Dashboard F	Provider Search Support	r	Account 은 Log out ④
Account	Profile		
Profile	Account Phone		
Notification Management	The phone number used to contact you and receive notifications	(999)999-9999	Save Changes
	Account Email		
	Email used to login and receive notifications	Account Email connectdemo01@payercompass.com	Save Changes
	Account Password		
	Password used to login to system	Current Password	Show
		New Password	Show
		 More than 7 characters At least 1 number(s)) O At least 1 symbol(s)
		New Confirm Password	Show

- 2. Enter your new password ensuring that it follows the minimum requirements provided.
- 3. Confirm your new password.
- 4. Click Save Changes.

Searching for Providers

A search for providers will give you the following information:

- whether the provider accepts your healthcare benefits plan
- whether the provider specializes in a particular type of care
- the provider's location and contact information
- the provider's quality rating based on how other patients have rated this provider

You can search for a provider by name, by specialty, or by procedure.





Searching by specialty: When searching for a provider by specialty, you can enter the name of the specialty, you can select one of the specialty icons, or you can select the **Show All** icon



) to see an alphabetical listing of all specialties and select from this list.

All specialties li	isted (deskt	op)							
•		\$			<u>~</u>	ÿ.		3	
Dentist	Dermatology	Endocrinology	Gastroenterology		Neurology	Home Health Care	Opht	thalmology	Hide All
All specialties	A B C D E	Allergy/Immunology Ambulatory Health Care Fact Ambulatory Surgical Center Anesthesiology Audiology Behavioral Health Facility Behavioral Health Facility Behavioral Health Physicians Cardiology Chiropractic Clinical Geneticist Dentist Dermatology Dialysis Durable Medical Equipment Endocrinology Endocrinology	lities	H I M N	Hematology Henatology Home Health Carce Hospital Infectious Diseases Infusion Therapy Internal Medicine Laboratory Massage Therapy Heonatology Heontology Neurology		P R S	Pain Managemer Pathology Pediatrics Physical Therapy Physicians Podiatry Prosthetics & Or Putmonology Radiology/Imagil Rehabilitation H Rehabilitation H Rehamatology Skilled Nursing F Speech Therapy Surgeons Urgent Care Urolegy	al Medicine thotics ng ospital acility
	F	Family Medicine					v	Vascular	
	G	Gastroenterology General Practice		0	Obstetrics/Gynoco Occupational Ther Oncology Ophthalmology Oral/Maxillofacial Orthopaedics Otolaryngology	ology apy Surgery	W	Wound Treatmer	<u>nt Center</u>

Searching by procedure: When searching for a provider by procedure, you can enter the name of the procedure, or you can click **Procedure** to see an alphabetical listing of procedures and select from this list.

To search for a provider

1. Begin typing the name of the provider, the specialty, or the procedure. When the name, specialty, or procedure appears in the list below the search field, select it.





Finding a provider (desktop) Dashboard Log out 🕣 Welcome A In Progress A In Progress Balance Bill Help 13 updates on your If you were sent a Outreach request Outreach request balance bill for medical services covered under you current cases with DAVID HECTOR with RAMON KUMAR M.D. Show all insurance prograr ve're here to help Jane Doe 04/20/1960 Jane Doe B001 07/08/22 07/08/22 Find a provider Q Doctor Name, Medical center, Specialty, Procedure etc 1833 Newton Dr, Flower Mound, TX 75028, USA Specialty Procedure æ M_ . . . Dentist Dermatology Endocrinology Gastroenterology Neurology Home Health Care Ophthalmology Show All

2. The **Location** field defaults to your actual current location if you have allowed your browser to access this information. If not, location is based on your account information.

To search in a different location, enter location information such as a street address, the name of a city, or a ZIP code. A list of locations meeting the criterion will appear. Select the location to use for the search.





Location field (desktop)

Dashboard Provider Search Cost Research	My Cases Support	م Account A	Log out ③
Welcome 33 updates on your current cases	In Progress Advocacy * 23004039 Find Acupuncture provider Jane Doe 04/20/1960 Updstel 44/20.120 P.0.0.2	In Progress Balance Bill - 2304040 Balance bill request Jane Doe 04/20/1960 Updred 02/24/33 Pr 1 0 1	Balance Bill Help. If you were sent a balance bill for medical services covered under your insurance program we're here to help:
Find a provider Q Provider Name North Kansas City x Doctor Name, Medical center, Specialty, Procedure etc			Search
Image: second			
即 64151 Mullen Road, Cassopolis, MI, USA 即 64151 E 255 PI, Grove, OK, USA			
ሠ 04151 Territorial Road, Hartford, MI, USA ወ 64151 250th Street, Nevada, IA, USA			

 Click Search. The top 25 providers that match your search criteria will be displayed on the Provider Search page. By default, these providers are listed in order by acceptance status, distance from your location, quality rating, and name. However, your plan may have implemented a different order for search results.

Note: If your plan does not offer Advocacy services, the My Cases option will be grayed out and you will not see the Balance Bill Help tile, any "cases" tiles, and the Request Outreach button on the provider search results.



Search results (desktop)



Search results (mobile)



Understanding your search results

Search results display the following information about the providers that meet your search criteria:





- Name
- Distance from the location entered, which can be a ZIP code, street address, or city/state
- Address
- Phone Number
- The provider's likelihood of accepting your health plan/program
- Quality rating (if enough data exists)

Emailing your search results

You can get an email that contains your search results by clicking search. This email will be either from <u>support_public@payercompass.com</u> or your health plan. The subject of this email will be "Your CompassConnect provider results." If you cannot find the email in your Inbox, check your Spam or Junk folder.

Viewing Provider Information

Search results (desktop)

You can click on a provider icon on the map to view the provider's name, plan/program acceptance, and quality rating. Clicking on this icon will highlight the provider in the search results list.

\bigcirc	Dashboard Provider Search —	Cost Research	My Cases	Support	Account	Log out
Q Prov	rider Name rth Kansas City × Doctor Name, Medical center, Specialty, Proc	edure etc				Search
O Lake	Waukomis, MO 64151, USA					
	NORTH KANSAS CITY HOSPITAL Hospital-General	△ Not	enough information	Map Satellite	tu Tti- Dearborn Edgerton, Test	tt Plattsburg 3 Lathroy
Ø 5.6 ml	2790 CLAY EDWARDS DR , NORTH KANSAS CITY, MO 64116 Phone: (816) 691-5232	∜ R	equest Outreach	Kickapoo Weston	Camden Point	Paradise Holt
	NORTH KANSAS CITY SLEEP THERAPY, LLC Dental Providers • KOALA CENTER FOR SLEEP DISORDERS - MO2	A Not	enough information	23 Leavenworth	Not enough ir NORTH KANSA THERAPY, LLC Dental Providers	oformation IS CITY SLEEP
	2008 SWIFT AVE, NORTH KANSAS CITY, MO 64116 Phone: (816) 897-0746	∛ R	equest Outreach	Lansing		Miss
	ORTHOPEDIC OUTFITTERS OF NORTH KANSAS Other Medical Supply Company	Cl 🛆 Not	enough information	Fairmount Basehor Piper	Parkville De North Kansas C	River Bend Athe
	2790 CLAY EDWARDS DR STE 615, NORTH KANSAS CITY, MO 6411 Phone: (816) 889-1565	16 🦪 R	equest Outreach	Bonner 32 Springs	B Kansas I	City Independence
	SCHOOL DIST 74 NORTH KANSAS CITY Agencies	🛆 Not	enough information	Can't decide or	Shawnee (2) Overland Park	Raytown Blue Unity Village
⊚ 5.6 ml	2000 NE 46TH ST , KANSAS CITY, MO 64116 Phone: (816) 413-6064	∛ R	equest Outreach	We can help you find a s	Cert Help	andview

A provider's likelihood of accepting your health plan is indicated across from the provider's name in the following way (The actual wording may vary):







If your health plan provides advocacy services, you can request help finding a provider or

determining whether a provider will accept your health plan by clicking the determining whether a provider will accept your health plan by clicking the determining on the map of the provider search results. See Requesting help finding a provider on page 20.

You can click anywhere in the provider's contact information to learn more about the provider such as hospital affiliations and education.

Sample Con	ntact Information	n for Provider (de	sktop)					
	Dashboard	Provider Search	Cost Research	My Cases	Support	Account 🖰	Log out 🥑	
< <u>₩</u>	MERITAS HEAL	TH CORPORATIO	N ☆ ☆		🧭 Potential program acceptan	ice Requ	uest Outreach	
Practice st MERITAS HE Specialtie	:atement :ALTH CORPORATION is a s	I medical facility located in I	NORTH KANSAS CITY, MC).	Map Satellite	n Paradise Smithville Ector Ferretview	Hat nville Karney er 😨 🔅 Mosb	Excelsion Springs
Contacts 2700 CLAY I	EDWARDS DR SUITE 400,	NORTH KANSAS CITY, MO	64116		Lansing mount sehor Piper	Platte Woods Parkville and Gl B and State	Liberty Missouri 29 River Bend Atherton	i City Sibley
Phone: (816	i) 436-7072	We	bsite: -			Kansas City	Independence	Buckner
Fax: (816) 4	36-2743	Em	ail: -		Bonner 32 Springs 32			
Language English	s spoken	NF	9 Number		Craig D Lenex	verland Park	ytown Blue Sp	nings 6
Rating					Can't decide or We can help you find a s arGoogle (150)	Find? specialist Loch Lloyd Keyboard abortouts ⁹ Was data	Greenwood	+ Ja -



Refining your search results

The initial search results returned use the following base criteria in addition to the specific criteria you specified:

- All plan acceptance levels
- All quality ratings (1 to 5)
- 50+ miles from the specified location

You can change one or more of the base criteria to refine your search results.

On a desktop device, changing the **Plan Acceptance** or the **Rating** will refresh the search results automatically. If you change the **Distance**, you will need to click the **Search** button to refresh the results.

25 Providers found	Plan Acceptance 👻 Rating	Distance: 10 20 40 50+
Changing Plan Acceptance	e (desktop)	
25 Providers found	Safe harbor provider	
JANICI Physician	Potential program acceptance	
	Not accepting	
⊙ 0.0 ml 4001 LOI Phone: (!	NC 97; Not enough information	

Changing Provider's Rating (desktop)



Changing Distance Searched (desktop)

Distance:	10	20	40	50+





On a mobile device, click the **Filter** icon , select how you want to filter the results, and click **Apply**.

12.payerco	mpass.com 🌵 🔊 🗄
Filters	×
Plan Acceptance	
Any plan accep	otance
O Safe harbor pro	ovider
O Potential progr	am acceptance
O Not accepting	
O Not enough inf	ormation
Rating	
🖲 Any rating	
01	*
<mark>O</mark> 2	**
<mark>)</mark> 3	***
4	****
○ 5	****
Distance:	10 20 40 50+
Clear filters	Apply

Clearing your search results

To begin a new search, click the **X** next to the current search criteria, enter your new criteria, and select the **Search** button.

Requesting help finding a provider

If your Health Plan Administrator uses Zelis's advocacy services, you can request help finding a provider or determining whether a provider will accept the health plan.

1. Click the **Get Help** button on the map of the provider search results.





Get Help



Select Request type

	Dashboard	Provider Search	Cost Research	My Cases	Support	_{Pov} Account A	ered by CompassConnect	
÷	Advocacy request		Select	Reauest	tvpe			
1	Request type			•				
	The types of requests you need he	lp with		Find me a pr	ovider			
2	General Information			Our specialists will h	nelp you find the best doctor for y	our needs	>	
	Basic information about the reque	ist						
	Patient Information			Confirm plan	accentance			
3	Who needs help with a case		1 Alexandre	Our specialists will o	confirm that the provider you're in	terested in is willing to accept your plan	<i>→</i>	
]	
4	Summary							

- 2. Select the type of request and then complete the requested information.
- 3. Click **Continue** to add the patient's information.
- 4. Click **Continue** to review the information being submitted.







5. If all the information is correct, click **Submit**. Otherwise, click the **Back** button to correct the information.

After you click **Submit**, you will get a message that the request was sent successfully. You will be able to monitor the status of a request (case) from your **Welcome** page's **Dashboard**.

Requesting Provider Outreach

If you have questions about any provider, you can submit a request for outreach to that provider via our Patient Advocates. This request will generate a case for our Patient Advocates to perform that outreach. However, feel free to go ahead and schedule your appointment while a Patient Advocate works your case.

Note: If your health plan administrator does not want you to create cases through CompassConnect, you will not see the option to request outreach.

Patient Advocates are available to answer any questions you have about your health plan. They are also able to help educate your doctor or hospital about your health plan, ensuring the provider understands how your plan will reimburse, or pay, for services. The goal is to gain a provider's acceptance of your plan rate as payment in full.

To request outreach

- 1. From the search results or the provider information screen, click **Request Outreach**.
- 2. On the **Request for outreach** screen, indicate whether you or the family member is a new or current patient.
- 3. If you already have an appointment scheduled, indicate the date of the appointment in mm/dd/yyyy format.





Request for outreach screen (desktop)

						Powered by C	ompassConnect
	Dashboard Provider S	Search Cost Research	My Cases	Support	Account	Å Log	out ()
£	Advocacy request		Request	for outrea	ach		
	/ avoid by request						
1	General Information Basic information about the request		🛆 Not enoug	h information 🔹 Not Rated			
2	Patient Information Who needs help with a case		PI PI PI	HERYL SAMPSON M.D. hysician/Internal Medicine 500 S LANCASTER RD MA hone: (214) 857-1911	e IL CODE 11-C, DALLAS, TX 75216		
			Patient type				
3	Summary		New Patie	ent	Current Patient		
			Do you have an app	ointment scheduled?	Appointment Date		
			Back				
			Dack				

4. Click **Continue**.





Patient Information screen (desktop)

	Dashboard	Provider Search	Cost Research	My Cases	Support	Account <mark></mark>	Log out	
¢ 2 3	Advocacy request General Information • Physician/Obstetrics & Gynecology 8380 N TULIS AVE STE 300, KANS 64150 • Phone: (816) 741-9122 Patient Information Who needs help with a case Summary	& kas city, mo	Patient Info Select the family m Q Search Back	Drmation member for whom	n you are making the mber group	request ⊟ Birth	Date	Q

- 5. On the **Patient Information** screen, enter one or more of the following criteria to narrow your search:
 - The name of the family member for whom you are requesting an appointment. This can be the first name, last name, or both.
 - The birth date of the family member.
- 6. Click to search for a list of family members meeting the search criteria.
- 7. Click **Select** for the family member for whom you are requesting an appointment. The **Confirmation of request** screen appears.





Confirmation of request screen (desktop) (1) Dashboard Provider Search Cost Research My Cases Account 은 Log out 🕑 **Confirmation of request** ← Advocacy request Request type Confirm Plan Acceptance General In • Physician/Obstetrics & **Provider Information** Provider Address & Contact Gynecology 8380 N TULLIS AVE STE 300 , KANSAS CITY, MO 64158 • Phone: (816) 741-9122 BRIDGET ABNEY MD 8380 N TULLIS AVE STE 300 , KANSAS CITY, MO 64158 Physician/Obstetrics & Gynecology Phone: (816) 741-9122 1245235084 Email: Jane Doe Family Member • ProviderTrans123 **Patient Information General Information** Jane Doe Patient type: New Patient 04/20/1960 Appointment scheduled: No Summary Email: Phone: Plan: CCDEMO ID number: ProviderTrans123 Back Submit

8. Review the information and click **Submit**. You will receive confirmation that the request was sent successfully.

By default, you will receive updates via email as your case is worked. You can change how you receive updates using the **Account** option (see To update how you receive notifications on page 11). You can also view all outreach requests using the **My Cases** option on the **Welcome** page.





Requesting Help with a Balance Bill

If you receive a balance bill from a provider, you can request help to resolve it. As part of this request, you will need to upload both the balance bill statement and the corresponding EOB (Explanation of Benefits).

Note: A balance bill is a bill that a provider sends to a member in an attempt to collect from a plan member the difference between what the provider billed and what the plan paid minus any copay or deductible.

You can submit a request by clicking the **Get Help** button on the **Balance Bill Help** tile or by clicking the **Create a case** button (desktop) or **Add Request** button (mobile) on the **My Cases** screen. (See page 29.)

The first time you submit a request for help with a balance bill, you will be asked to agree to Terms and Conditions. Your acceptance creates an electronic version of a HIPAA release form so that Payer Compass can access your health information.



To open a case for a balance bill from the Balance Bill Help tile

1. From the **Balance Bill Help** tile on the **Welcome** page, click **Get Help**.



T	Dashboard	Provider Search	Cost Research	My Cases	Support	Account 옷	Log out 🧿
			General In	formation			
÷	Billing Support		Notes				
0	General Information Basic information about the case		Describe the details				
2	Patient Information Who needs help with a case		Upload Documents	5 (1)			
3	Summary		Please attach one bill p for assistance	per attachment with the co	prresponding Explanation	n of Benefits (EOB) or reach o	ut to your Health plan
				Drap and drop files here	Or	Browse files	
						Continue	⊚

2. Enter any notes about the balance bill and upload the balance bill statement and corresponding EOB.

Note: A description in the Notes field is required.

3. Click **Continue**.



Powered by Congressions	
 Account A Log out O Dashboard Provider Search Oc Research My Cases Support Account A Log out O Continue 	

- 4. Enter the name of the patient and a birth date (optional). Then, click to display those on your health plan meeting the search criteria.
- 5. Select the person for whom you are opening the Balance Bill case.
- 6. Review the information. If correct, click **Submit**. Otherwise, click the **Back** button.

After you click **Submit**, you will get a message that the request was sent successfully. The case will appear on your **Welcome** page's **Dashboard**.

By default, you will receive updates via email as your case is worked. You can change how you receive updates using the **Account** option (see To update how you receive notifications on page 11). You can also view all outreach requests using the **My Cases** option on the **Welcome** page.

Viewing and Adding Requests

You can view your open and archived cases for both provider outreach and balance bill resolution from the **My Cases** option on the **Welcome** page. The default view is all open cases.





General Information for Balance Bill (desktop)

						12.payercompass.com	m 🌵 🖟
My Case	S Open A	Archived			Create a case	\bigcirc	
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From the **My Cases** page, you can also create a new case.

To create a new request (case)

- 1. On the **My Cases** page, select **Create a case** (desktop) or **Add Request** (mobile). A page for selecting the type of request opens:
 - Finding a provider
 - Confirming plan acceptance
 - Getting help with a balance bill

Select Request type screen (desktop)



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2. Select the type of request and then complete the requested information.

Note: The first time you select **Billing Support**, you will need to read and agree to the Terms of Service. Your acceptance creates an electronic version of a HIPAA release form so that Payer Compass can access your health information.

- 3. Find and select the patient for whom you are making the request.
- 4. Review the information being submitted. If all the information is correct, click **Submit**. Otherwise, click the **Back** button to correct the information.

After clicking **Submit**, you will get a message that the request was sent successfully. The case will appear on your **Welcome** page's **Dashboard**.

By default, you will receive updates to your cases via email. You can change how you receive updates using the **Account** option (see To update how you receive notifications on page 11).

To add information to your request (case)

You can send a message to the Patient Advocate about your request. Simply open the request and type your message in the Communication area and click the arrow.

← O	Balance bill request	Type Balance Bill	Created 08/25/22	Updated 08/25/22	▲ In Progress
Notes			Communication		
Test			Type your message	here	1

Searching for the Cost of a Procedure

The **Cost Research** option allows you to search for a medical procedure performed by a given provider and find out how much your plan will pay for that procedure.

Minimally, you will need either the name of the procedure or the medical code associated with it, a location, and the desired distance from your location (defaults to 50+ miles).

To search for the cost of a procedure

1. Begin typing the name of the procedure or the procedure code. When the name of the procedure appears in the list below the search field, select it.

Note: You can search for simple procedures such as a colonoscopy or more complex procedures that require the combined services of multiple providers to provide the encounter of care.

The complex procedures available to select are based on those most frequently requested by plan members for services involving multiple providers. The list of complex procedures will expand as more of these services are identified.





Searching for Procedure Cost

	Dashboard	Provider Search	Cost Research —	My Cases	Support	Account 今	Log out 🧿
Q Search b	y procedure or code			1833 Nev	vton Dr, Flower Mound, TX 75028,	USA	Search
Q Provide	search name, special	ty		Best II	Lowest Price Plan Acceptance 👻	Rating - Distance: 10	20 40 50+

2. The **Location** field defaults to your actual current location if you have allowed your browser to access this information.

To search in a different location, enter location information such as a street address, the name of a city, or a ZIP code. A list of locations meeting the criterion will appear. Select the location to use for the search.

- 3. To search for a specific provider or provider specialty, begin typing the name of the provider or the provider's specialty. When the name of the provider or the specialty appears in the list below the search field, select it.
- 4. Use one or more of the following fields or options to refine your search results:
 - Click ^{Best} to find providers with the highest quality scores given the other search criteria being used. You can use either the Best option or the Lowest Price option. You cannot use both.

I Lowest Price

- Click to list the search results from the lowest plan pays amount to the highest plan pays amount. You can use either the Lowest Price option or the Best option. You cannot use both.
- Plan Acceptance: The likelihood that the provider will accept your health plan. The default is to search all providers regardless of whether they will accept your health plan.
- Rating: The minimum quality rating of the providers to return in the search results. The default is to search all providers regardless of rating.
- Distance: The default is 50+ miles from the specified location. You can limit the search radius to 10, 20, or 40 miles.
- 5. Click **Search**. Up to 10 providers that offer the requested procedure based on your search criteria will be displayed. By default, these providers are listed in order by acceptance status, distance from your location, quality rating, and name. If you selected the Lowest Price button, the search results will include procedure/provider cost.

You can change one or more of the base criteria to refine your search results





Understanding your search results

Search results display the following information about the providers that meet your search criteria:

- Name
- Distance from the location entered, which can be a ZIP code, street address, or city/state
- Address
- Phone Number
- The provider's likelihood of accepting your health plan/program
- How much the plan allows. This amount is calculated by creating a typical claim for the procedure using the contracted pricing with the provider, if available, and/or your health plan's benefit if a contract is not in place with that provider.
- The member's responsibility. If the plan document is available, a link will be provided to the document for the member to use to determine member responsibility.
- Quality rating (if enough data exists)

For complex procedures, such as a Total Knee Replacement, you will be able to see the total price that the health plan will pay and the amount that will be paid to each provider, for example, to the surgeon, the anesthesiologist, and for any medical equipment required after the procedure.

Because the procedures involved in a complex procedure may vary based on individual medical needs, you have the option to add procedures to a complex procedure and search again to determine your price.

For a complex procedure, the total amount the plan will pay is displayed. You can see the

amount the plan pays by provider by hovering over the information icon \$2,015 of to display

Anesthesia	\$595
Professional	\$1,420
Facility	\$0
Total	\$2,015

the cost of each service involved: A \$0 amount may indicate that the service is not required for the procedure or that an estimate cannot be determined.

To view and modify a complex procedure

Complex procedures are comprised of the multiple procedures typically performed by one or more providers to address a plan member's health concern. The procedures that comprise the complex procedures are based on what is typically required. Your individual medical needs may require additional procedures be performed or that a typical procedure not be performed.

You have the option to add procedures to a complex procedure or delete a procedure and search again to determine your price.





Plan Pays

1. Click the icon to open a window, where you can view the different procedures involved and the categories into which they fall.

Total knee replace	ment		Save the Set			
Professional (3)	Facility(0)	Anesthesia (1) 🔽	Lab (0) 🖌	DME (0) 🧹		
3 Procedures	earch Procedure					
TOTAL KNEE ARTHROP	\odot	1 unit(s)	۵			
X-RAY EXAM OF KNEE,	Θ	1 unit(s) 🕀	۵			
	SV (76942)		Θ	1 unit(s) ①	_ ش	

- 2. To add a procedure to a complex procedure, search for the procedure and click on the result when found. Then, click the + to add the number of units for that procedure.
- 3. Click **Save the Set**. On the results screen, click **Search** again.



