



CompassConnect

Member Guide

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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:

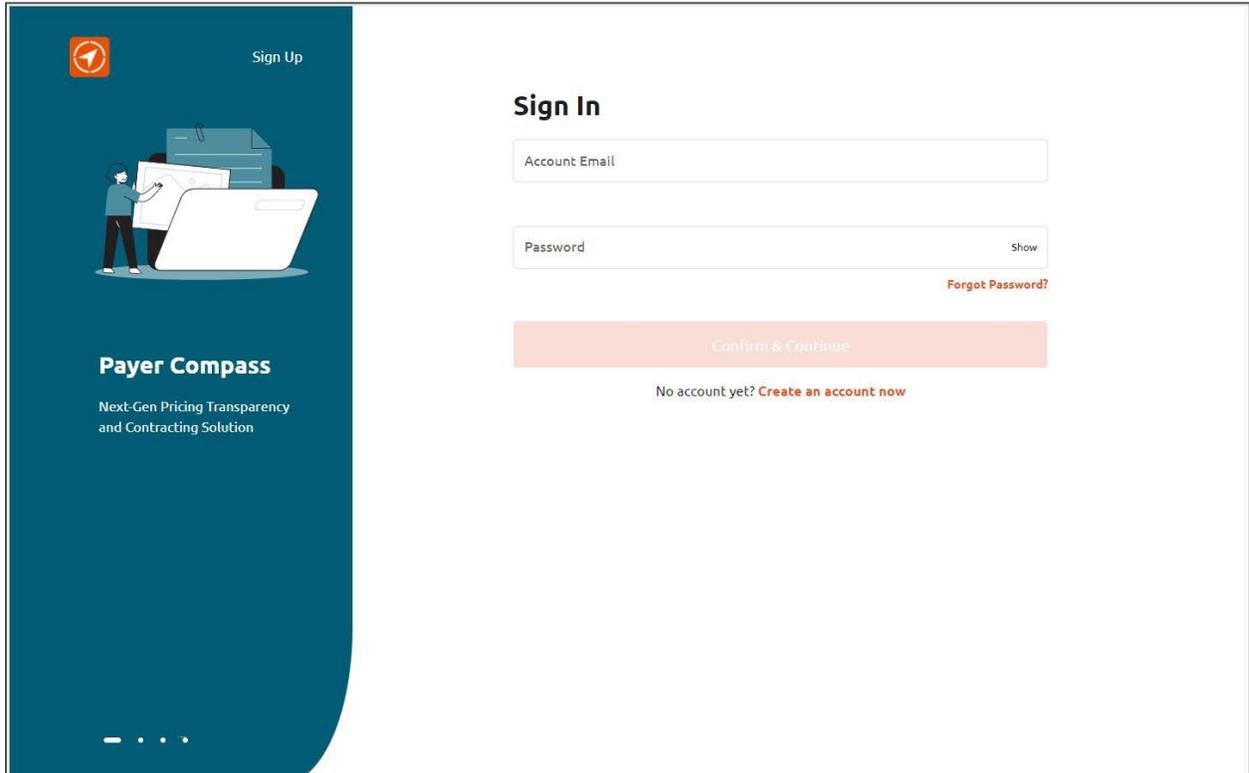
- ID Number
- First Name
- Group Number
- Date of Birth
- Zip Code

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.

Sign In screen (desktop)



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)

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)

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

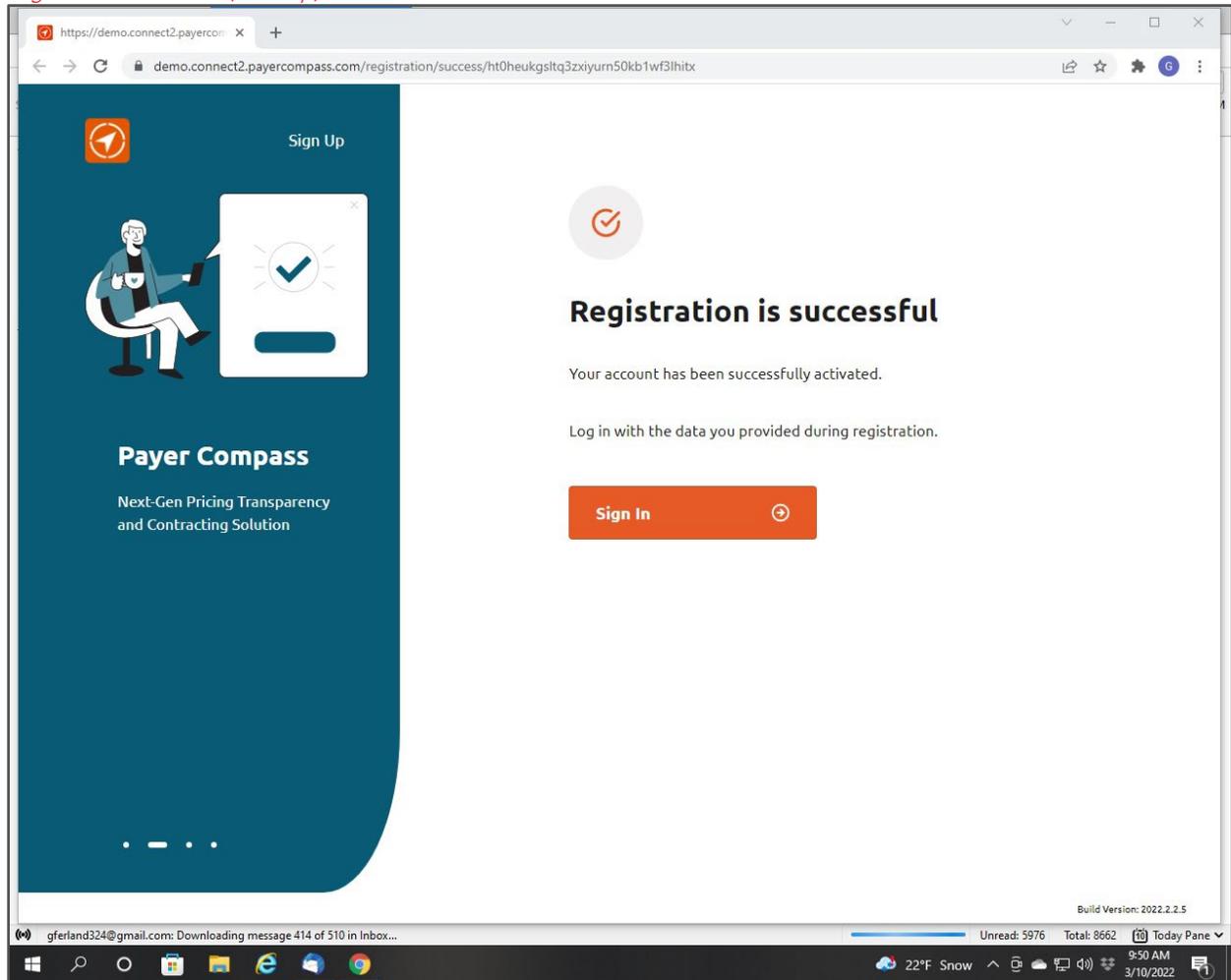
Note: The email address and password you enter during the registration process will be your CompassConnect login credentials. All notifications from CompassConnect will be sent to this email address.

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

Email to confirm account

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

Registration Successful (desktop)



You are now ready to use CompassConnect.

To access your CompassConnect account

- Use the URL provided by your health plan administrator to access the CompassConnect website.
- 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.

Service Disclaimer (desktop)

Sign Up

Registration process

1 Compass Connect Service Disclaimer

Please approve

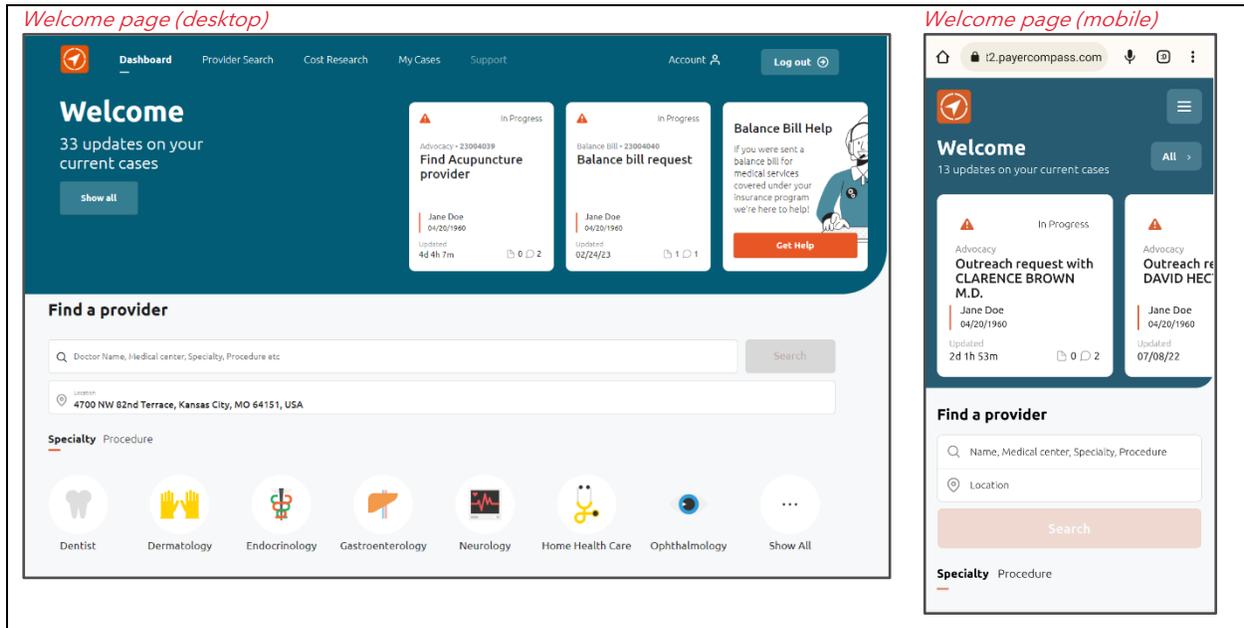
You can't use this application before approve

Compass Connect Service Disclaimer

CompassConnect's Provider Dashboard contains provider quality information obtained from the Centers for Medicare & Medicaid Services. Payer Compass cannot guarantee the accuracy of this information due to regulatory reporting cycles and regulatory errors. The Provider Dashboard also contains provider location and map data obtained from the National Plan and Provider Enumeration System. Payer Compass cannot guarantee the accuracy of this information due to individual provider reporting cycles and reporting errors. Payer Compass does not guarantee that any particular provider will accept a plan's reimbursement rates at the time services are rendered. Payer Compass does not provide medical advice, guarantee the quality of service, or guarantee the level of service from any provider. In the event that a provider has communicated historically that it will accept a plan's reimbursement rate, this in no way guarantees that the provider will accept the reimbursement rate in the future nor does Payer Compass recommend any such provider for care. Members are solely responsible for choosing the best provider for their medical care. Payer Compass does not quote or verify benefits or eligibility. Payer Compass is not a Preferred-Provider Organization ("PPO") or a "provider network" as defined by applicable laws or regulation and does not credential or enter into written contracts with providers. Payer Compass disclaims any liability in connection with using CompassConnect. By clicking "I Agree" below, you acknowledge that you have read, understand, and agree to these limitations.

I Agree

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

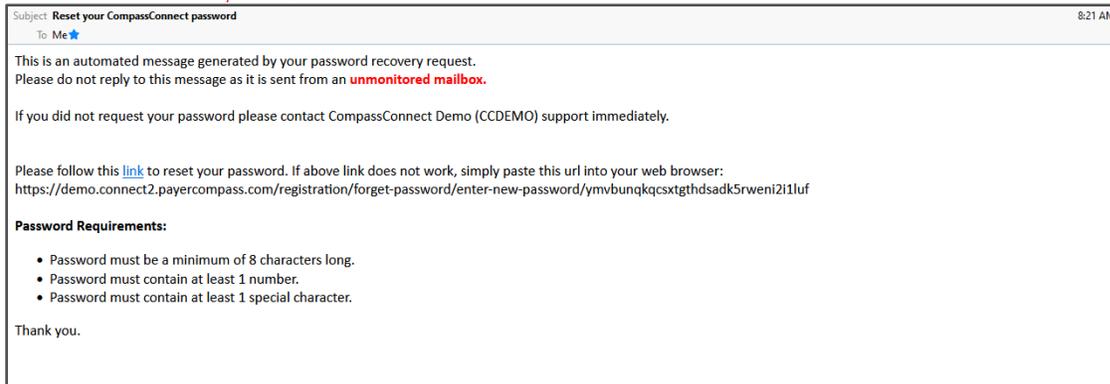


To reset your CompassConnect password

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

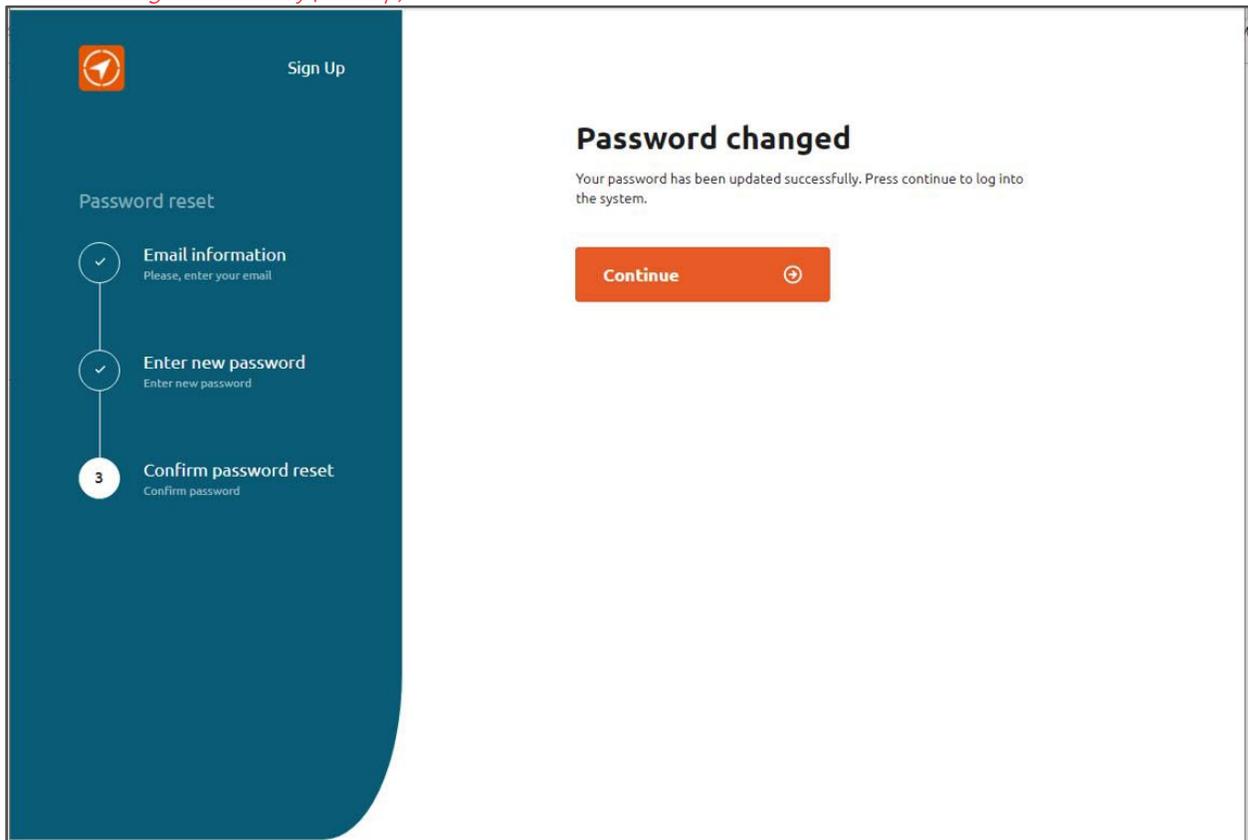


4. Click on the link inside the email. The **Please enter your new password** screen appears.

Enter new password (desktop)

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)



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

Managing Your Account

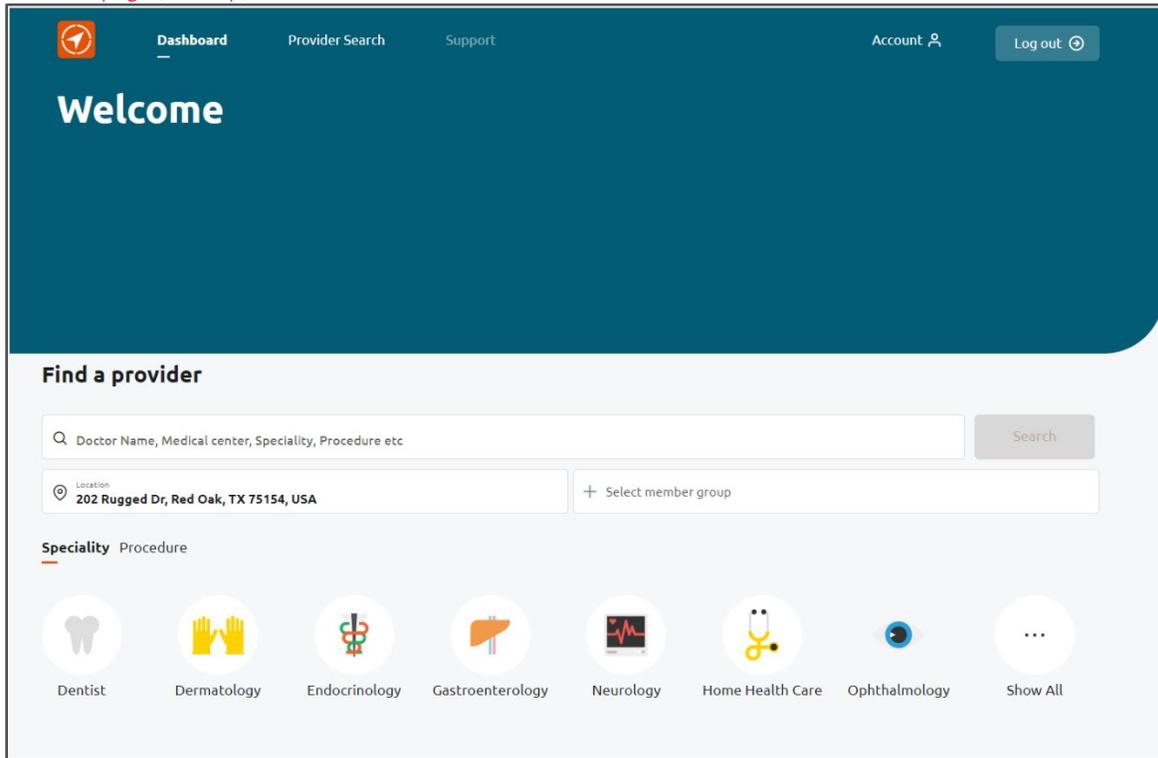
Initially, your account profile consists of the email address you entered during the registration process. If desired, you can add a phone number to your profile and manage whether you receive account notifications via email, text, or both. By default, you will receive account notifications via email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

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

To update your phone number or email address

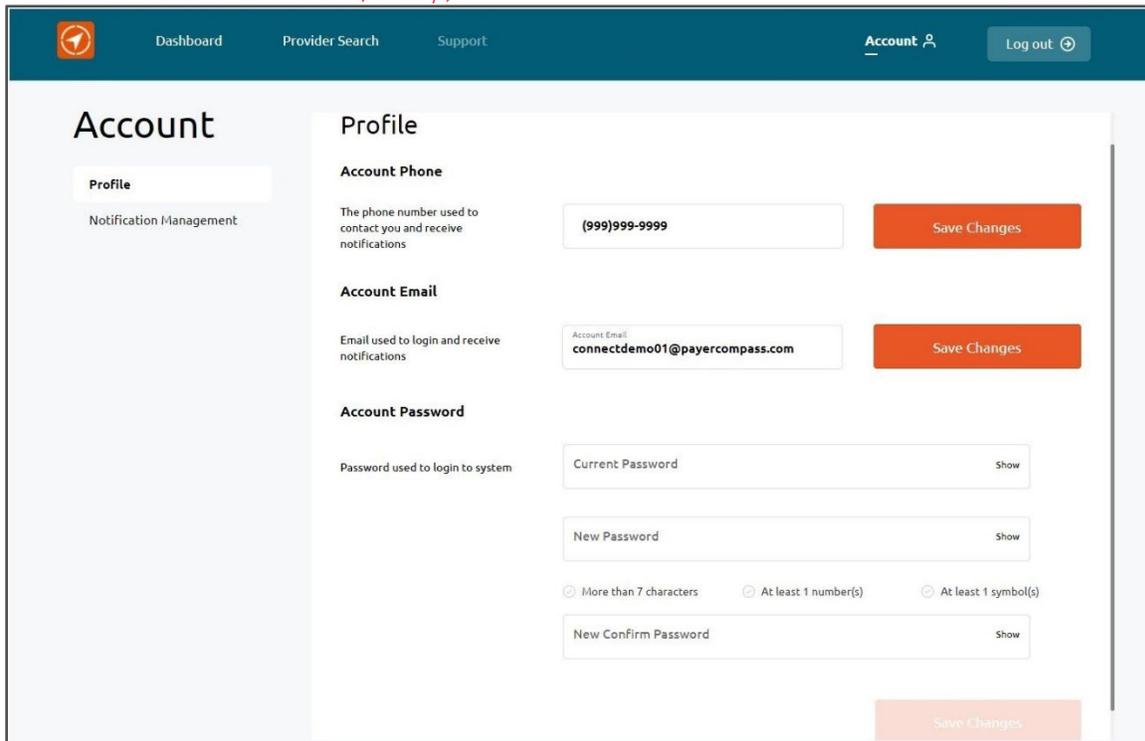
1. On the **Welcome** page, click **Account**.

Welcome page (desktop)



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 screen with Profile selected (desktop)



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.

Confirmation code (desktop)

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)

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)

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.

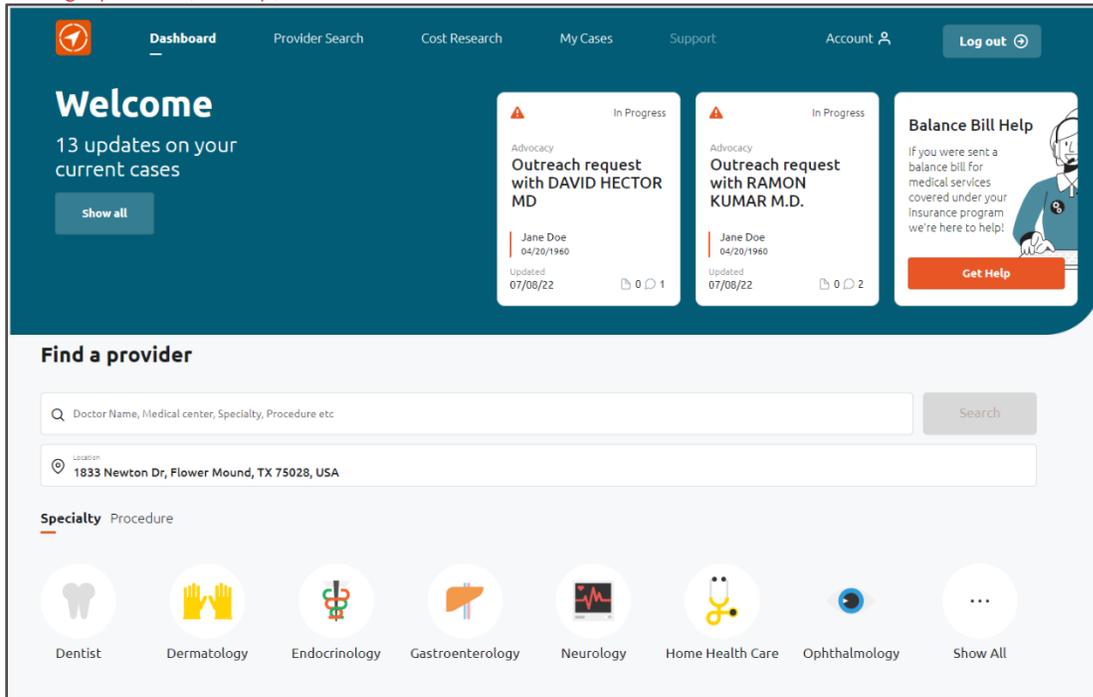
All specialties listed (desktop)

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.

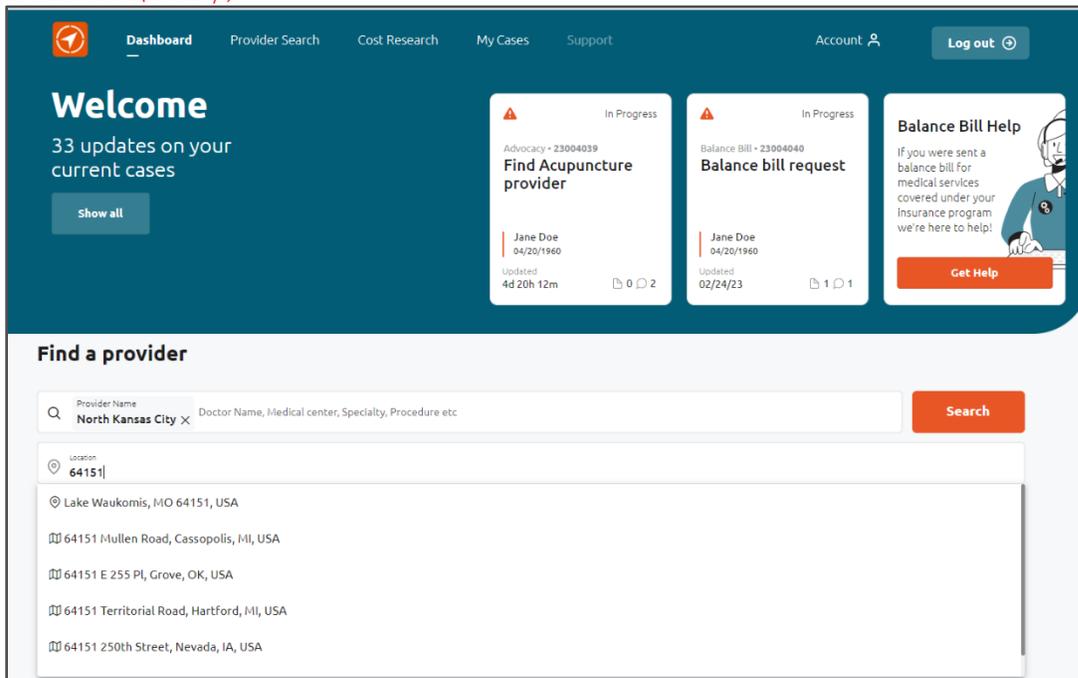
Finding a provider (desktop)



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)



3. 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)

The desktop search results page shows a navigation bar with 'Dashboard', 'Provider Search', 'Cost Research', 'My Cases', 'Support', and 'Account'. The search criteria are 'North Kansas City' and 'Lake Waukomis, MO 64151, USA'. It displays 20 providers found, with filters for 'Plan Acceptance' and 'Rating'. The results list includes:

- MERITAS HEALTH CORPORATION**: Physician/Internal Medicine • MERITAS HEALTH NORTH KANSAS CITY. 2700 CLAY EDWARDS DR SUITE 400, NORTH KANSAS CITY, MO 64116. Phone: (816) 421-4240. Status: Potential program acceptance, Not Rated. Distance: 5.6 ml. Button: Request Outreach.
- NORTH KANSAS CITY HOSPITAL**: Hospital-General. 2800 CLAY EDWARDS DR., NORTH KANSAS CITY, MO 64116. Phone: (816) 691-2000. Status: Potential program acceptance, 4.5 stars. Distance: 5.6 ml. Button: Request Outreach.
- PRIMARY CARE NORTH KANSAS CITY LLC**: Physician/Family Practice. 5861 NW 72ND ST., KANSAS CITY, MO 64151. Phone: (816) 741-2186. Status: Not enough information, Not Rated. Distance: 0.0 ml. Button: Request Outreach.
- CITY OF NORTH KANSAS CITY**: Emergency Medical Service Providers. Status: Not enough information, Not Rated. Distance: Not specified. Button: Request Outreach.

A map on the right shows the location of the providers in North Kansas City, MO.

Search results (mobile)

The mobile search results page shows a search for 'Cardiology' at '4700 NW 82nd Terrace, Kansas City, M...'. It features a 'Can't decide or find?' section with a 'Get Help' button. The results list includes:

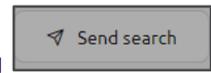
- ANDREW BOERKIRCHER D.O.**: Physician/Cardiovascular Disease (Cardiology). 2790 CLAY EDWARDS DR STE 520, NORTH KANSAS CITY, MO 64116. Phone: (816) 221-6750. Status: SS Average, Potential program acceptance. Distance: 7.9 ml. Button: Request Outreach.
- JAMES MITCHELL M.D.**: Physician/Cardiovascular Disease (Cardiology). 2790 CLAY EDWARDS DR SUITE 520, NORTH KANSAS CITY, MO 64116. Phone: (816) 221-6750. Status: SS Average, Potential program acceptance. Distance: 7.9 ml. Button: Request Outreach.

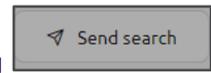
Understanding your search results

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 . This email will be either from support_public@payercompass.com 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



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.

Search results (desktop)

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):

Safe harbor provider

Provider has agreed to accept the program’s health plan. The provider is listed as “safe harbor.”

Potential program acceptance

The provider has accepted the program’s health plans in the past.

Not accepting

This provider has refused to accept the program’s health plans in the past or has sent a plan member a balance bill.

Not enough information

Not enough information exists to determine whether this provider is willing to accept the program’s health plan.

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  button 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 Contact Information for Provider (desktop)

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

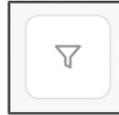
You can change one or more of the base criteria to refine your search results.

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.

Changing Plan Acceptance (desktop)

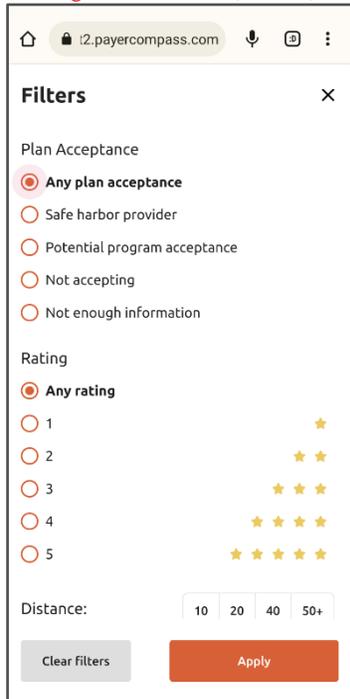
Changing Provider's Rating (desktop)

Changing Distance Searched (desktop)



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

Filtering Search Results (mobile)



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  button on the map of the provider search results.

Get Help

The screenshot shows a search results page for providers. On the left, there are four provider cards, each with a profile icon, name, specialty, address, phone number, and a 'Request Outreach' button. The providers listed are:

- GINA JONES DO**, Physician/Neurology, 2401 GILLHAM ROAD CHILDREN'S MERCY HOSPITAL AND CLINICS- NE..., Phone: (816) 234-3090
- JILL JONES MD**, Physician/Diagnostic Radiology, 3901 RAINBOW BLVD MS 4032, KANSAS CITY, KS 66160, Phone: (913) 588-5887
- JORDAN JONES DO**, Physician/Pediatric Medicine, 2401 GILLHAM RD., KANSAS CITY, MO 64108, Phone: (816) 234-3000
- MATTHEW JONES DO**, Physician/Internal Medicine, 2401 GILLHAM RD., KANSAS CITY, MO 64108, Phone: (816) 234-3000

On the right, there is a map of the Kansas City area with a red location pin and a 'Get Help' button. The map also shows various other locations and a 'Can't decide or find?' message.

Select Request type

The screenshot shows the 'Select Request type' page. On the left, there is a navigation menu with four steps: 1. Request type, 2. General Information, 3. Patient Information, and 4. Summary. The main content area has a heading 'Select Request type' and two options:

- Find me a provider**: Our specialists will help you find the best doctor for your needs. (indicated by a right arrow)
- Confirm plan acceptance**: Our specialists will confirm that the provider you're interested in is willing to accept your plan. (indicated by a right arrow)

The 'Confirm plan acceptance' option is highlighted with a red border.

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.

Dashboard Provider Search Cost Research My Cases Support Account **Log out**

Powered by **CompassConnect**

Request for outreach

← Advocacy request

- 1 General Information**
Basic information about the request
- 2 Patient Information
Who needs help with a case
- 3 Summary

⚠ Not enough information ⭐ Not Rated

CHERYL SAMPSON M.D.
Physician/Internal Medicine
4500 S LANCASTER RD MAIL CODE 11-C, DALLAS, TX 75216
Phone: (214) 857-1911

Patient type

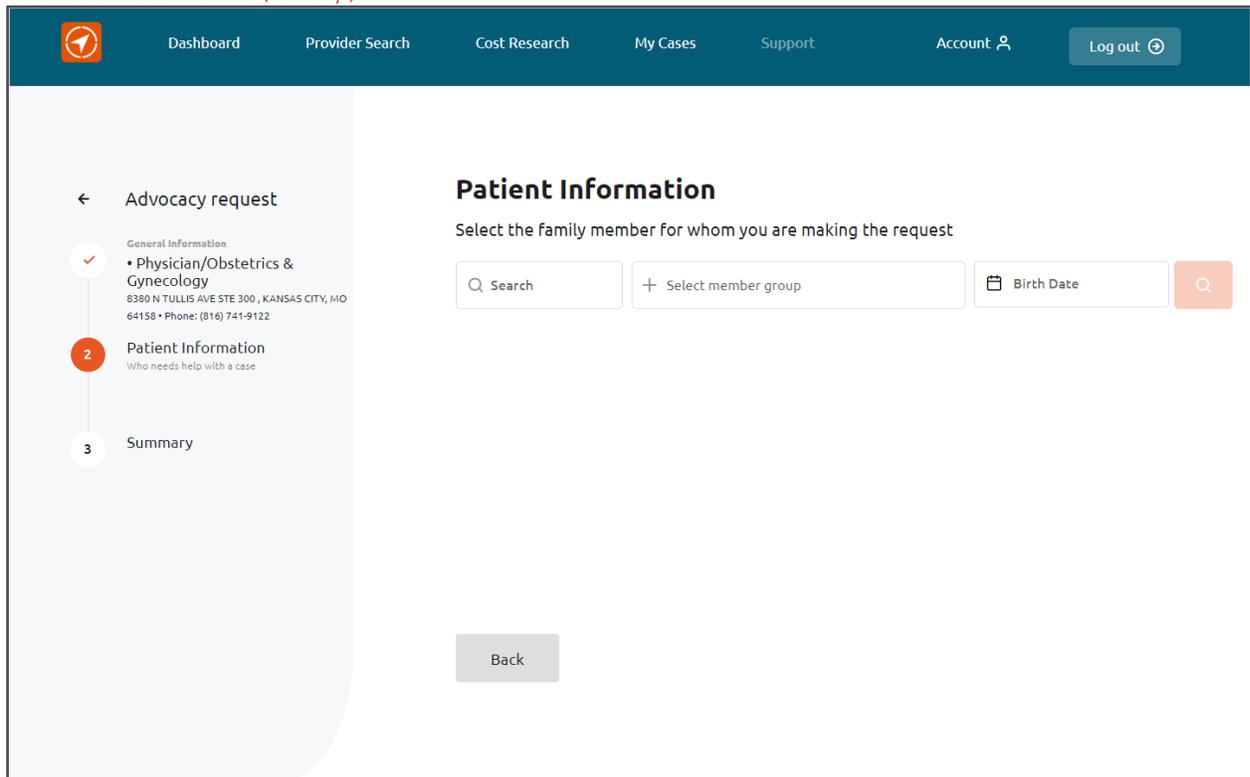
New Patient Current Patient

Do you have an appointment scheduled?

Appointment Date

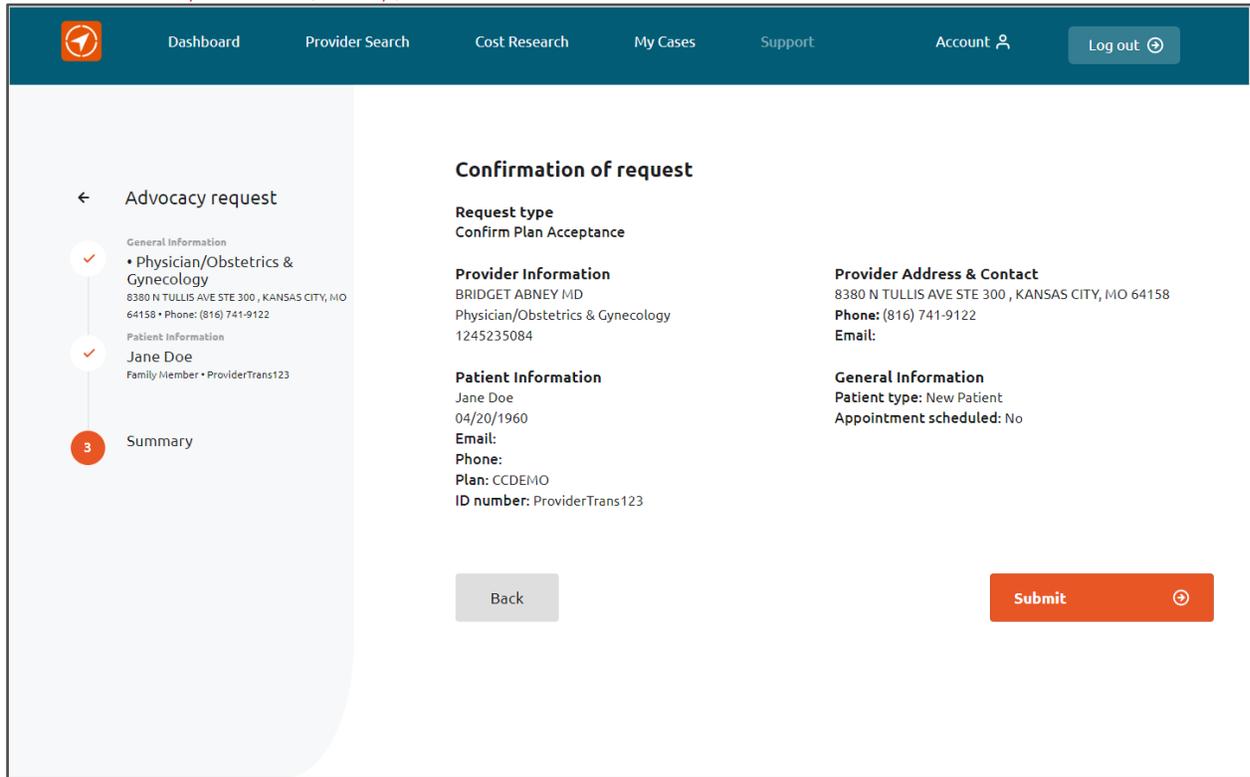
4. Click **Continue**.

Patient Information screen (desktop)



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)



- 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

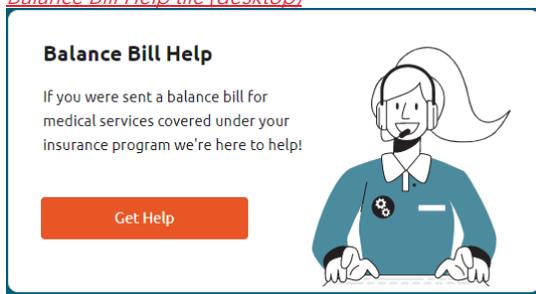
If you receive a balance bill from a provider, you can request help to resolve it. As part of this request, you will need to upload both the balance bill statement and the corresponding EOB (Explanation of Benefits).

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.

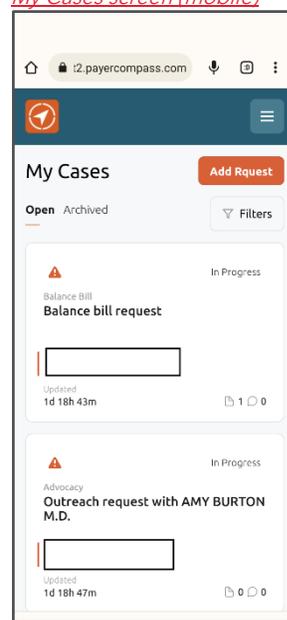
You can submit a request by clicking the **Get Help** button on the **Balance Bill Help** tile or by clicking the **Create a case** button (desktop) or **Add Request** button (mobile) on the **My Cases** screen. (See page 29.)

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.

Balance Bill Help tile (desktop)



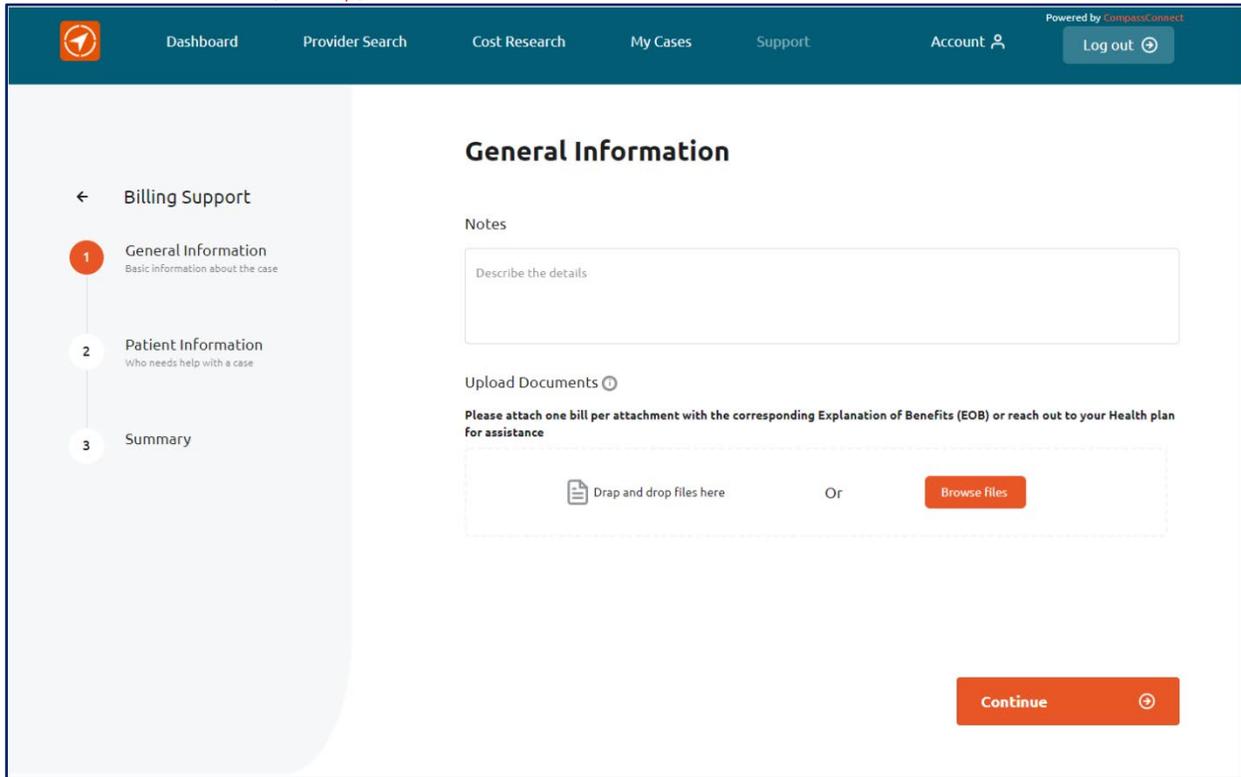
My Cases screen (mobile)



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**.

General Information screen (desktop)

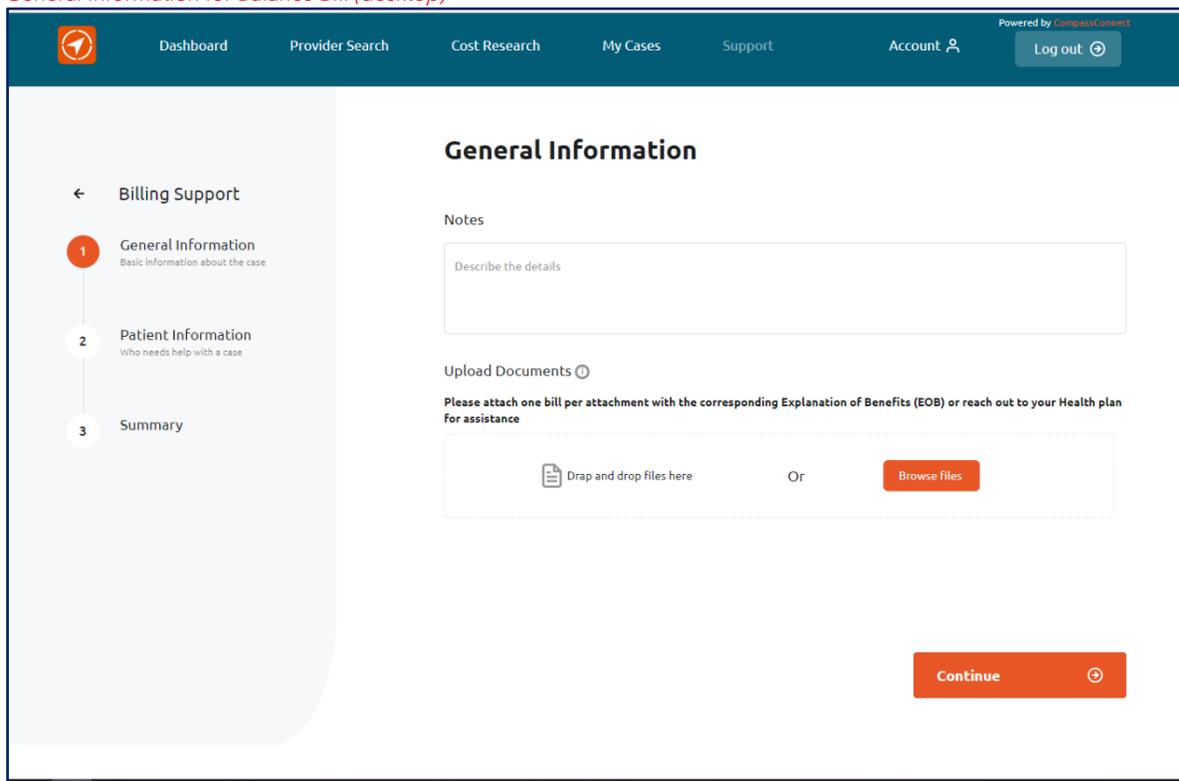


2. Enter any notes about the balance bill and upload the balance bill statement and corresponding EOB.

Note: A description in the Notes field is required.

3. Click **Continue**.

General Information for Balance Bill (desktop)



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.

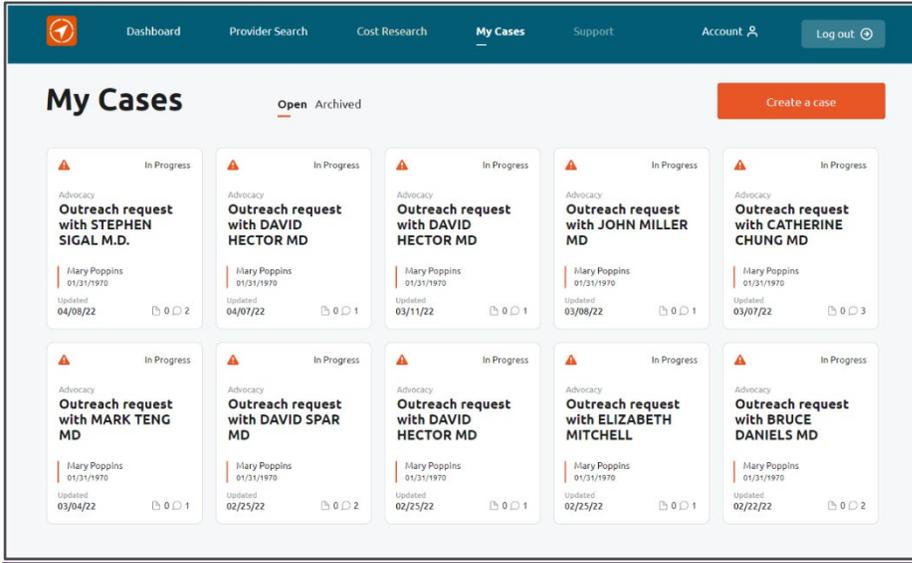
After you click **Submit**, you will get a message that the request was sent successfully. The case will appear on your **Welcome** page's **Dashboard**.

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.

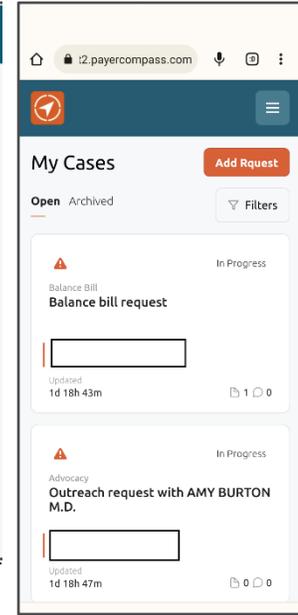
Viewing and Adding Requests

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.

My Cases (Open) (desktop)



My Cases (Open) (mobile)

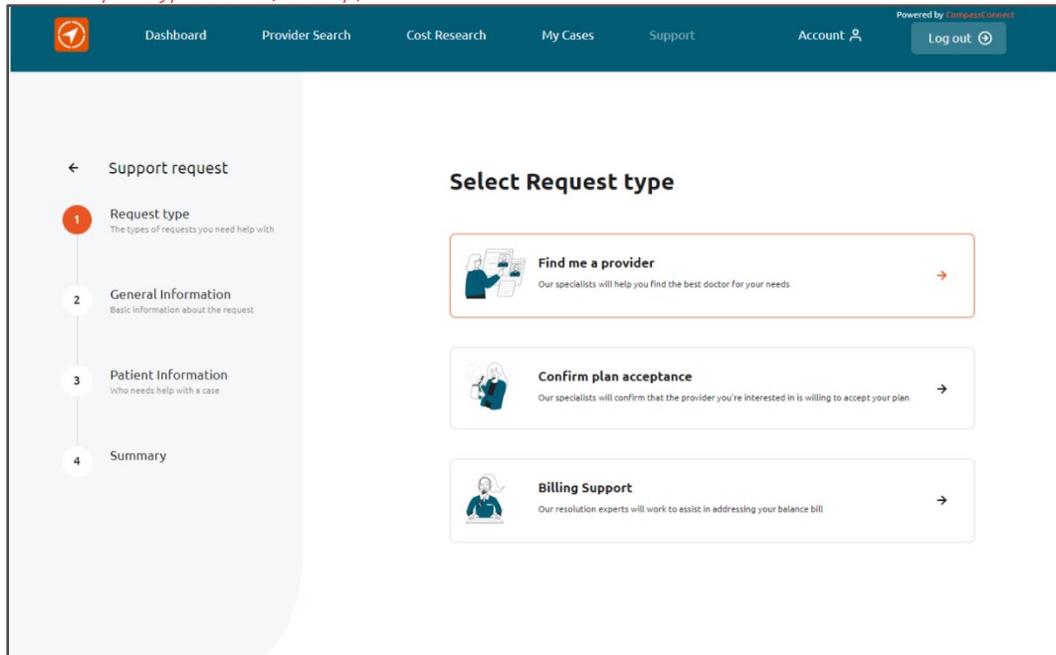


From the **My Cases** page, you can also create a new case.

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)



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.

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



- 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.

- 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.
- Use one or more of the following fields or options to refine your search results:

- Click  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.
- 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.

- 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

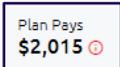
Search results display the following information about the providers that meet your search criteria:

- 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  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.

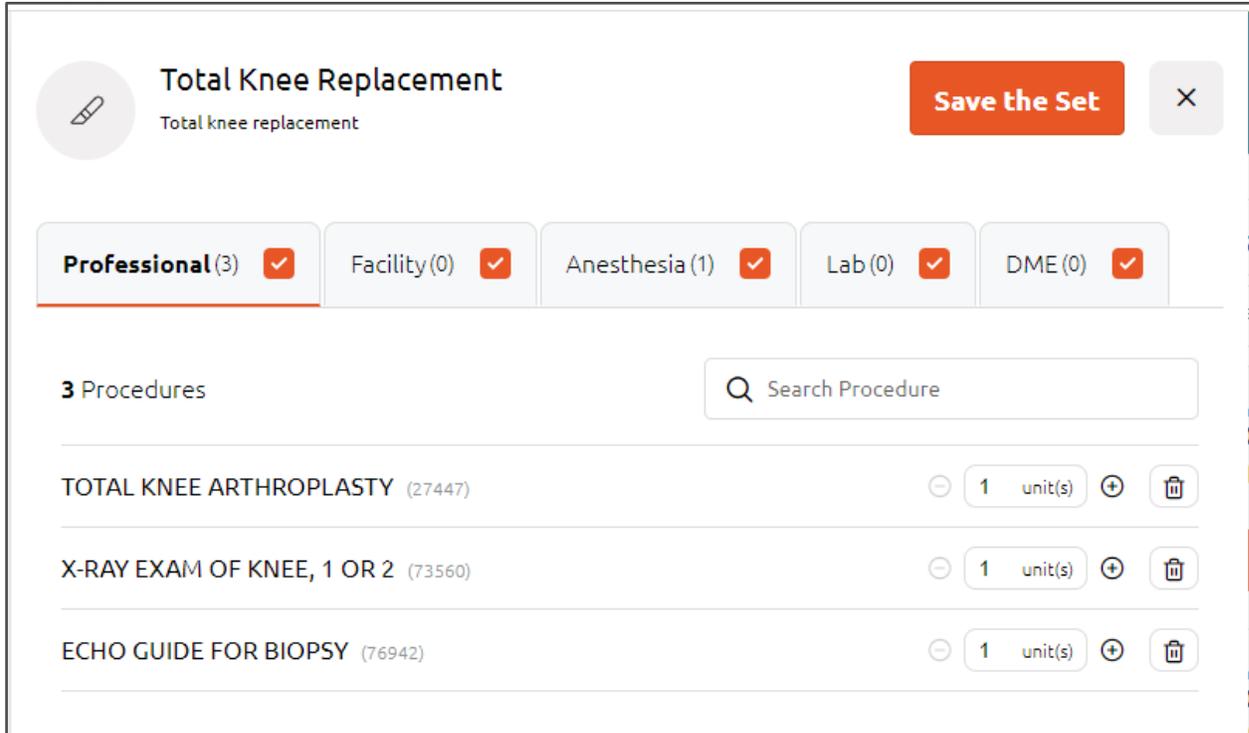
To view and modify a complex procedure

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.

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

Identifying Procedures



Total Knee Replacement
Total knee replacement

Save the Set ×

Professional (3) ✓ Facility (0) ✓ Anesthesia (1) ✓ Lab (0) ✓ DME (0) ✓

3 Procedures

TOTAL KNEE ARTHROPLASTY (27447)	1 unit(s)	+	🗑️
X-RAY EXAM OF KNEE, 1 OR 2 (73560)	1 unit(s)	+	🗑️
ECHO GUIDE FOR BIOPSY (76942)	1 unit(s)	+	🗑️

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.