CONNECT User Summit:
Frequently Asked Questions

Session Topics

AR Follow Up		
No.	**Question**	**Answer**
1	**Corrected Claims** How can you submit a corrected claim?	**** Links to Help **** • Rebilling Claims with Fee Changes • Rebilling Claims without Fee Changes **Also Note:** *There are videos at the bottom of each of those topics to walk you through the processes in Connect.*
2	**Messages** Where do I go to check to see if I received a message? Do we get an alert?	Go to **File > Messages**. There is not an alert. You would need to check for it. At the bottom right of the screen is green text: "1 unread message"
3	**Messages** Do all clients have the Message option?	Yes, all clients/users. The user's role needs correct permissions to use.
4	**Messages** What does it look like on those tasks with a due date that are not completed by the due date?	They turn to red text.
5	**Notes** When making action notes for multiple claims/lines, the note shows multiple times in the account notes. Can it be changed to only show once?	**** Enhancement Request **** *There is already an enhancement request in to change this - to try and consolidate it.*
6	**Payments** Is there a place to state if the last payment is a patient payment or ins co-payment?	No, we don't currently have that functionality available within Connect. **** Enhancement Request **** *The request has been noted for future consideration.*
7	**Payments** Is there a place where we can see when the last payment was made, without having to go into their acct?	It is available on the **Guarantor/General** and **Insurance/General** tabs within Collections.
8	**Denials** How do we know what denial code is?	This information comes out of Payment Entry. The denial codes will pull into the account and post in the collection queue.
9	**Actions** When the staff is working top to bottom on their next transaction, when they create an action, the whole thing moves and they can't find their patient.	Once you create a Next Action, it drops out to remove clutter.
10	**General** If you rearrange the columns, will that "hold" for the next time you go into the collections queue? Or do you have to rearrange each time you go in?	In order to save the changes you've made to the columns, you need to use the **CLOSE** button on the bottom right when closing the tab instead of Xing out.
11	**Search** Did additional filters on the **Search** button make the enhancement request list?	**** Enhancement Request **** *Yes, it has been incorporated into enhancement considerations.*

AR Follow Up		
No.	**Question**	**Answer**
12	**Corrected Claims** Are we able to use the resubmission codes? For example, BX wants an original claim and wants us to use "7" in Box 22.	**** Links to Help Topics **** • Rebilling Claims with Fee Changes • Rebilling Claims without Fee Changes For electronic claims - as long as payer control number is entered on the payment, the system automatically adds the 7. While the Status code will be automatically added to the electronic claims if the criteria is met, if you need to have it print on a paper claim, then you will have to enter the payer control # as 7 or 8(space)payer control # for it to go correctly on a paper claim (for example *7 112300137*). You will also need to make sure that you have the paper claims option for Box 22a set to print the Medicaid resubmission code and then Box 22b to print the payer control #.
13	**Corrected Claims** Is there a note in Box 19 for correction?	Yes, for paper claims. It won't work for electronic claims - need the 7 to designate it as a corrected claim.
14	**Best Practice** Is there a benefit to using Suspense as opposed to recouping and reentering?	No, it is each client's preference.

Charge Entry		
No.	**Question**	**Answer**
1	**General** Can you sort the fields in the EDC pick & chooser and then select the group you want by DOS, etc.?	Yes, you can sort, but you have to still check each case on the left in the list.
2	**Importing** Can you import Provider Times without codes?	You can, but once you enter the procedure code, you have to re-enter the Provider Time.
3	**Images** Can you use move images to divide records, say you scanned 2 records and needed to split them or do you have to rescan the image?	You can move them and select a new set. **** Link to Help Topics **** • Image Viewer Page
4	**Configuration** Do you have to have your payer also set up with the checkbox in order for the NOS description to submit?	No. That is hardcoded. The Box 19 narrative would not apply.
5	**Timing** How long does it take for an electronic claim to be submitted to the clearinghouse?	In most cases, within an hour.

Creating & Updating User Roles		
No.	**Question**	**Answer**
1	**Permissions** Is there a way for people in the office to see the patient SSN without being an Admin?	Yes, they just need the permissions set up for them to do so.
2	**Process** Are you able to add a new role?	**** Link to Help Topics **** • Creating Roles

Denial Management		
No.	**Question**	**Answer**
1	**Process** Right now our payment posters have to change the balance to Guarantor in the payment posting screen before they can take a manual adjustment. If we changed Adjustment to "Allow", would we no longer have to do that?	Yes, you would still need to do that.
2	**Reports** Is there a report that can show the current denial code parameters without clicking on each one individually?	No, not currently.
3	**Reports** Does the EPPR report generate for either ERA or Manual payment posting?	Just ERA.
4	**Reports** Can the EPPR report be printed before the batch is released?	Yes.
5	**Reports** Can you show us where to find the EPPR?	**Payment Batch > Import Exceptions** tab (lower right).
6	**Timing** Does the Collection module update right away?	It updates overnight.

Eligibility		
No.	**Question**	**Answer**
1	**Clearinghouse** So does one need to use TriZetto in order to utilize the eligibility module?	Currently yes, but once Iteration 2 releases (R22.5), then you will be able to use Connect’s Eligibility functionality even if you don't use TriZetto as your claims clearinghouse.
2	**Pricing** Is there a charge thru to TriZetto for each eligibility file we submit? Is there a fee for each individual submission of is it a standard monthly fee unlimited checks?	Yes, there is a fee associated with eligibility checking. Pricing depends on how many transactions you run - would need to discuss the specifics with our Sales Team. ($29 for first 200, then $.145 for each additional)
3	**Functionality** Are we able to check on more than one insurance at the same time?	Each request is for one insurance, but you can submit multiple insurance searched by selecting "Select All".

Fee Schedules		
No.	**Question**	**Answer**
1	**Functionality** Will the added modifier show up on charge entry?	Yes, as long as it is in your fee schedule.
2	**Importing** Is there an ETA on being able to Import Fee Schedules via a csv file?	No, ETA at this time. **** Enhancement Request **** *The request has been noted for future consideration.*
3	**Code Updates** To confirm, in a few months when new codes come out, these will be loaded into Connect and we must import ourselves into our billing fee schedule?	Yes, that is correct.
4	**Process** Not all of our contracts use current year RBRVS values, can we choose which year RVU's to use for calculation by Fee Schedule?	Yes, you need to add the procedure code to the fee schedule from the valid year they are paying on.
5	**Setup** Why do you have a Fee Schedule with and without a physical status code?	It depends on if you have payers that want to see physical status on claims and/or pay physical status.
6	**Recalculating** On the re-calculate Fee Schedule, does it actually update the account when a payment has already been posted?	It does as long as the plan is only associated to one expected fee schedule.
7	**Process** We override the majority of our fees, but the overrides are the same across multiple fee schedules. Is it possible to clone one fee schedule, override the codes, and pass the overrides to the other fee schedules? Or do they have to be overridden manually for each separate fee schedule?	Yes, you would clone/update your fee schedule with the new year codes, then update your override fees, and then clone for any additional new year fee schedules, as needed.
8	**Process** When our Collectors rebill an older date of service and the fee schedule has been updated since it was first billed, they have to re-enter the CPT code. Is there something that can correct that?	No, the system is looking for the code year that was used on the case and the fee schedule code year has been updated. So the code has to be re-entered.
9	**Archiving** Once a Fee Schedule is archived... we can still see it, we just can't use it. Is that correct?	Yes, this is correct.
10	**Best Practice** We have contracts where only the Provider is billed and not the CRNA. How do you recommend we set up the billing fee schedule?	Solo Providers = 100% Directing Providers = 100% Directed Providers = 0% Plans associated to fee schedule, set to "Bill Doctor Only"

Insurance Plan Configuration

No.	Question	Answer
1	**Update** Am I able to update the coverage/insurance type in a current plan without any issues?	Yes, dependent if it is changed to the correct one.
2	**Setup** How does the Medicare Default Concurrency Scheme differ from a commercial Concurrency Scheme?	The Medicare Default Scheme is the one that is defaulted in the system to follow CMS rules, and typically doesn't send PS modifiers at all.
3	**Process** How are the other concurrency schemes created? Is it necessary to create another scheme?	You would have to create the additional schemes and then would update your plans to use the scheme you prefer. It depends on your billing situation as to whether you need more than one scheme. **** Link to Help Topics **** • Configuring Concurrency Schemes
4	**Reports** Provider IDs screen: When using the suspend claim option, is there a report available to see which Provider claims are currently suspended?	No, there is not currently a report for this.
5	**Best Practice** Auto and Worker Comp's want medical records attached to claims so we print to paper. Any suggestions or help coming in the future?	Use PWK segment.
6	**Functionality** Is there a way to release all of the suspended claims for a provider once credentialed?	No, this is not currently possible.
7	**Process** Is there a way to add the payer ID information viewable in different areas of Connect, like patient insurance information?	**** Enhancement Request **** *The request has been noted for future consideration.*

Modern Reports		
No.	**Question**	**Answer**
1	**Functionality** Is there a way to do a productivity report for charge entry, where it gives times for each entry? Time stamps (created) would be great. As a manager to track productivity for charge entry for each case would be great.	The only productivity report we currently have is for Charge Entry. It only returns the date created. **** Enhancement Request **** *The idea has been noted for future consideration.*
2	**Search Parameters** When you are entering your parameters and you leave them blank will it do 'all'?	Yes, it will not restrict results and return all records.
3	**Functionality** Is it possible to add Non-AR payment components like "Payment Posted to Misc Income", "Payment Posted to External Collection" under Financial Activity Summary-Details Report?	**** Enhancement Request **** *The ideas have been noted for future consideration.*
4	**Best Report** Can we run the report by Collector?	Yes, the ***Insurance Collection Actions Detail*** report can be run by collector.
5	**Best Report** What is the best report to run if you are looking for only zero balance accounts? I see choices to leave out zero balances, but not choices to select only zero balances. Using this to determine the % of collected dollars compared to the expected.	There is not a great option for that report at this time. **** Enhancement Request **** *The request has been noted for future consideration.*
6	**Process** Does running a BIG report (lots of transactions, long period of time) impact the system response time?	There have been reports that ***Charge Analysis Detail*** report causes the biggest problem with this. It might time out. Suggest running for a shorter time period and combining reports.
7	**Process** Does anyone know how to run a credit report for INS only so I can do refunds?	**** Links to Help Topics **** • ***Credit Balances Detail*** report • **Manage >** Credit Balances
8	**Functionality** How do you use the custom fields under Admin? Does it create a report?	**** Link to Help Topics **** • **Manage >** Custom Fields

Payment Entry		
No.	**Question**	**Answer**
1	**Functionality** Where can I see the full description of the Reason Codes?	**Admin > Denial Management**
2	**Functionality** Do images follow the suspense payment when you distribute to an account?	The images do not follow suspense accounts. If you use On Account, they do. **** Enhancement Request **** *The request has been noted for future consideration.*
3	**Functionality** Is the external collection payment included in the total deposits?	It is a separate bucket in reporting.
4	**Best Practice** What are the benefits of creating an image batch?	The benefit is that the check copy or the EOB is always attached to the payment. If you need to find it, it is in your system and is always in the batch or on the account. It alleviates going to another place to find what you need.
5	**Pricing** Is there an additional charge for image batching?	There is a charge per image. Contact Client Services for details.
6	**Information** Where did you go to get those scanner configuration options?	**** Link to Help Topics **** • Image Viewer Page > Scanner Profile Configuration
7	**Functionality** Are you able to add images to payment batch after it's posted?	Yes, but not the recommended best practice.
8	**Functionality** How come the collection box does not populate for some claims?	**** Link to Help Topics **** • Distribution: [ID] Page The **Collections** checkbox is visible only if the service line is eligible for collections. The service line must meet all of the following conditions: • The balance must be greater than zero • The responsibility must be payer and not guarantor • The service line must not already be in collections
9	**Functionality** If you link the specific image, can you still see the rest of the EOB? Or can you only see those certain pages?	You will only see those certain pages.
10	**Functionality** Is there a way to add the remark code, the codes with additional info usually starting with M or N?	**** Enhancement Request **** *The request has been noted for future consideration.*
11	**Functionality** Is there a place to get a listing of all the remark codes that are listed?	No, we don't currently have that functionality available within Connect. **** Enhancement Request **** *The request has been noted for future consideration.*

Working Case Holds		
No.	**Question**	**Answer**
1	**Functionality** Do the case hold notes appear in the account notes?	No. **** Enhancement Request **** *The request has been noted for future consideration.*
2	**Process** How do you release a claim hold before date you put in? Need to release the claim before that date, but after the case has been submitted. We are doing a Rebill 2, but it creates duplicate claims.	Do a Rebill 2 on the held claim from the account. **** Link to Help Topics **** • Rebilling Claims without Fee Changes
3	**Permissions** How do we get access to the Case Hold screen? Do I need access given?	Based on permissions and your role.
4	**Process** How do you cancel out an electronic claim in claims once it had generated, but not transmitted?	There isn't a way. **** Enhancement Request **** *The request has been noted for future consideration.*
5	**Process** When we put holds on claims that are set to print to paper, the hold doesn't work. Is that correct?	That is correct. **** Enhancement Request **** *The request has been noted for future consideration for paper claims.*
6	**Archiving** What does archive claims do?	It removes them from the Electronic Claims list. If you search by "Archived" status, it can still be accessed.
7	**Printing to PDF** Is there an option to print to a PDF so a paper claim doesn't actually print? How do we do that?	**Claims > Paper Claims > Print Selected > Printer**: *Print to PDF*, or click **Preview**.