WELCOME!

WellCare is pleased to offer you an enhanced payment and reconciliation solution through PaySpan Health! This new solution will enable you to receive faster payments through electronic deposits with complete remittance details. You will have numerous online capabilities to search claims and remittance details and produce custom reports. Use this guide to understand the features available within the PaySpan Health system.

Getting Started

1.1.1 General Features

- PaySpan Health provider site has an online security subsystem that allows you to control each user's access to specific customer applications, individual reports, and web site features.
- PaySpan Health provider site security control includes controlling access to the following functions:
  - Managing accounts
  - Reconciling payments
  - Viewing payments online
  - Viewing account configuration
  - Administering user rights
  - Accessing individual reports
- PaySpan Health provider site logs all user activity on the PaySpan Health provider site.
- PaySpan Health provider site provides Online Help on every screen.
- PaySpan Health provider site supports Internet Explorer 5.0 and above.

1.1.2 Login

You may log in through the PaySpan Health link on the WellCare website. For Georgia Medicaid providers, that site is http://georgia.wellcare.com. For all other WellCare providers, it is http://www.wellcare.com. You must be a registered user of the WellCare site to reach the PaySpan Health link. Once you have logged into the WellCare provider area, then you may select the EFT/ERA link to log into PaySpan Health.

To log in, enter your registered e-mail address, and the password "setup" during the enrollment process.

Your session will expire, and you will be automatically logged out of the PaySpan Health system after 15 minutes of inactivity. This is to prevent sensitive information from being available to unauthorized users. Forgotten passwords are e-mailed to the user's e-mail address of record upon request.

1.1.3 Home

The PaySpan Health home page is the first screen you will see after successfully logging in. From this screen, you can see a listing of your new WellCare payments. Clicking on the payments or download link allows you to quickly download the remittance information on your newest payments in the file format you have configured for your account. In addition, the Quick Links area allows you to easily navigate to certain sections of the application.

From the home page you can:

- Download new payment information
- Run reports
- View reconciliation history
- Search payments

1.1.4 New Payments

New payments are displayed in a grid on the New Payments page. If you click **View**, a PDF version of the payment will be displayed in a separate window using an Adobe PDF viewer.

If you would like to download the new payments information into your accounting system or review the new payments online, you will no longer view new payments. Select the payments using the check boxes on the right and click **Next**. You will receive a New Payment Download Summary. The system will test your connection speed and provide an estimated download time from this page.

1.1.5 Payments

You may use options from the Payments menu to manage your Receiving Accounts, PaySpan Health Payers and view previous reconciliation downloads.

The options available from this menu pertain to your payments:

- Account Management
- Payer Management
- Reconciliation History

Account Management

PaySpan Health organizes your incoming payments into Receiving Accounts. The Account Management section of the site contains information on each of the Receiving Accounts that have been set up to receive payments from registered Payers. This section is controlled by security access rights. Your user administrator may restrict your access to these pages or certain accounts. If you have not been granted access, you will not see the Receiving Accounts menu item or all Receiving Accounts available.

From the Account Management screen, you are able to view active, inactive, rejected, or pending Receiving Accounts, along with the Receiving Account configuration. You may edit a Receiving Account, modify user access to a Receiving Account, or search payments by clicking the corresponding links. In addition, you have the option to add a new Receiving Account by clicking on the **New Account** button.

Create Receiving Account

You may create one or more Receiving Accounts and specify different configuration information for each to fit your specific needs. By creating a Receiving Account through the PaySpan Health system, you have the ability to download remittance data in formats that your accounting system will support. In addition, you may view your remittance data online. To create a Receiving Account, you will need to go through an initial account configuration along with an account verification process.

Receiving Account creation will begin on this page. Enter the account name, account description, account type, routing and account numbers, accounting system, and download format. By default, EFT payments will be enabled. Once the Receiving Account has been configured, select **Next** to begin the account verification process and access the Confirmation page.

The Confirmation page provides you with a summary of the Receiving Account configuration information. This page is intended for you to use as verification to ensure that the appropriate information was entered correctly. You may select the **Edit** option to change any information that is incorrect or select **Confirm**. Confirmation of this information will send e-mail notifications and prompt one of our PaySpan Health representatives to call and verify the Receiving Account information.

Edit Receiving Account

The Edit Receiving Account screen allows you to modify the Receiving Account name, account description, accounting system, and download format. In addition, you may change the status of a Receiving Account from this page.

Account Access

The Account Access screen allows you to grant or revoke user access to specific Receiving Accounts. This gives you a system-wide view of who does and does not have access to a given account.

1.1.6 Reports

Reports allows the user to view historical records of their Payments. Standard reports, such as the Payment Detail Report, are predefined and use a default set of fields. If the reports do not provide the needed information, a custom query can be run to get a list of records meeting the appropriate search criteria. If there will be a repeated need to execute this query, it can be saved under a name of your choice at which point it will be included in your report list. You will then have the option to export the report in a number of different formats, including Excel, Microsoft Word, and PDF for storage and printing from your local computer. Setting the **Accessibility** to Private or Shared will determine if it is only available to the individual that created it or is available to anyone who is assigned permission to run it.

The options available from this menu allow the user to:

- Perform a Document Archive Search and have the ability to save it as a report
- Run a report

Document Archive

The Document Archive provides powerful searching and online viewing capabilities for all payments that have passed through the PaySpan Health system. This includes all payments that have been downloaded for reconciliation on your behalf, as well as all payments that were only viewed online.

The Receiving Accounts available are displayed as tabs across the screen. You must first select the appropriate tab for searching the archive. You may specify as much or as little information as desired for the search. If you specify criteria for multiple fields, the system will return results that meet all criteria. The following data types are supported for searching (the data type for each field is displayed to the right of the input control on the screen):

- Character Fields
- Numeric Fields
- Date Fields

Click **Search** to display the Search Results. To create a new report, you will save a set of New Search Criteria as a Report for future use or for sharing with other users.

Run Reports

The Run Reports page displays saved Report Templates - those reports you have saved for your own private use and shared reports to which you have been granted access. You may run, edit, or delete reports from this page. Clicking the **Add** button will take you to the Document Archive Search page to create new search criteria.

Running Saved Reports

From the Run Reports page, you can run any report by clicking its corresponding run link. You may select the corresponding View link to view the item online. If the saved report is a standard template format, running the report will display a formatted report in the Report Viewer window. If the saved report has runtime criteria, running the report will display a modified version of the Document Archive Search page to allow you to enter values for the runtime criteria only. See the Save/Edit Report page for more information.

Editing Saved Reports

For reports that you have created, you may also edit or delete them. You will not be allowed to edit or delete reports that were created by other users. Editing a saved report displays the Save/Edit Report page.

Grant User Access to Shared Saved Reports

If you are a user administrator, you may grant access to shared reports by selecting the Reports Access option under the Security Administration menu. This option will not be displayed for users who are not user administrators.

Save/Edit Report
You may save Document Archive searches as reports for future use or for sharing with other users by clicking the **Save** button at the bottom of the Document Archive Search page. Upon selecting Save, you will be prompted with the Save/Edit Report screen. From this screen, you will specify a report name for the saved search and whether you want it to be **private** or **shared** with other users. Access to shared reports may be granted to other users by your user administrator. Other users will not see private saved reports.

Search criteria are also displayed in a table on this screen. If desired, you may specify the saved report to prompt the user for one or more fields when accessing the saved report at a future time. For example, you may wish to save a report that searches your documents based on a particular date, but you would like the option of specifying a Payer when you run the report. If desired, the **prompt at runtime** box located next to the Payer field can be selected, which allows you to prompt the user for one or more fields when the save report is run at a future time.

You may schedule reports to run at a future time or run periodically. To schedule reports, you will need to select between Daily, Weekly, or Monthly options from this screen. Once you select an option, the system will prompt you to enter a time and how frequently you want the report to run. You may also configure the reports to be e-mailed to you by checking the **E-mail report to me** box.

In addition, you have the ability to select an output format for the report. A drop-down list is provided on this screen. You may specify the target output to be stored for retrieval on the site or to e-mail results to those who have access to that report.

If you are editing a report from the Run Reports page, you may click the **test** link to run the report and test its functionality. This is particularly useful when specifying runtime criteria. Clicking **change** will take you to the Document Archive Search page to change the saved criteria.

1.1.7 Preferences

The options available from this menu pertain to your user account for the web site:

- Edit Profile allows you to change your name, e-mail address(es), and e-mail address type.
- Change Password allows you to change your login password.

Edit Profile
The Edit Profile screen allows the user to modify contact information.

Change Password
The Change Password screen allows the user to select a new password for accessing the site.

1.1.8 Administration

PaySpan Health has a security model that allows healthcare customers to precisely designate which users will have access to the appropriate menu items and features. Each customer will select a user or group administrator who will be able to set access rights for their users according to their departmental needs. This administrator has access to the User Administration and Security Administration sections described below to administer users and set security access rights to the PaySpan Health Provider Site features.

The group administrator may choose to restrict access to various features on the web site for process or security reasons. For example, the administrator may restrict access to the **Account Access** or the **Edit Receiving Account** functionality.

The Main Menu Bar will appear for all users. For a menu item to work, the user must have the correct security access set by the group administrator. If you believe you need a menu item to be displayed, please contact your group administrator.

The options available from this menu allow the user to:
- View, add, and edit users and their individual access rights using User Administration.
- View and edit the user access lists for individual security features using Security Administration.
- Send e-mails to users of the PaySpan Health Provider site using e-mail Users.
- View user history of past activities on the web site through the Activity Log.

User Administration
The User Administration screen allows you to view, add and edit registered users. Only a group administrator will have access to this page. To add a user, click on the **Add** button. To edit a user, click on the corresponding user name. You may view Inactive Users by checking the **Show Inactive Users** check box.

Security Administration
The Security Administration pages are available to the group administrator. These pages allow you to set security access rights for a specific feature, account, or report by selecting a list of users. This is the same functionality that is provided on the Add User and Edit User page, except that this section is organized by security feature instead of by user. If you would like to change the security access for an individual user, you should use the User Administration section. If you would like to change the security access to a specific feature (a specific report, for example), you should use this Security Administration section.

The options available from this menu allow the user to:
- View and edit the user access list for each Account using Account Access.
- View and edit the user access list for each feature on the web site using Feature Access.
- View and edit the user access list for each Report using Reports Access.

Account Access
The Account Access screen allows you to grant or revoke user access to specific Receiving Accounts. This gives you a system-wide view of who does and does not have access to a given account.

Feature Access
The Feature Access screen allows the administration to grant or revoke access for specific users to perform certain features.

Reports Access
The Reports Access Screen allows administration to grant or revoke access for specific users to available reports.

Activity Log

The Activity Log screen allows the user to view their past activity on the site. A group administrator will have access to the activity log entries of all users from their company and may filter by user if desired. Users who are not group administrators will only have access to log entries of their own activities. The user has the option of filtering the activity detail by Severity and Date.