Explanation of Payment Guide

CHORUS
COMMUNITY HEALTH PLANS

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1. Introduction

Explanation of Payment (EOP) documents are available to providers after reimbursement has been processed. It explains why a provider received payment and it may contain information on administrative adjustments, check payments or electronic fund transfers.

Under expected conditions, these documents are directly available from the Provider Online portal after overnight printing and mailing. This document serves as a user guide to understanding how to retrieve these documents and how to obtain the correct permissions to access the EOP module of Provider Online.

1.1. About the Explanation of Payment Guide

The Explanation of Payment Guide is written to inform users who have a need to access EOP documents to provide functions such as searching, retrieving and annotate these documents.

This document also aims to inform Online Account Administrators (OAAs) in the provider offices how to:

- Assign access to the Chorus Community Health Plans Provider Online Portal Explanation of Payment component
- Equip the Online Account Administrator with the specifics and constraints of this feature so they can answer basic user inquiries

Online Account Administrators would be well served to review this manual in its entirety.

2. Search for an Explanation of Payment Document

Retrieval begins by selecting the Explanation of Payment (EOP) option from the left side main navigation menu (see Figure 1). However, users must have permission to view Explanation of Payment documents on Provider Online. This permission is granted through a request to the user's Online Account Administrator (OAA). If the Explanation of Payment option is not presented to the user in the main navigation menu, that indicates permission to view these documents has not been granted by the user's OAA. The user should contact their OAA to obtain the necessary access privileges.

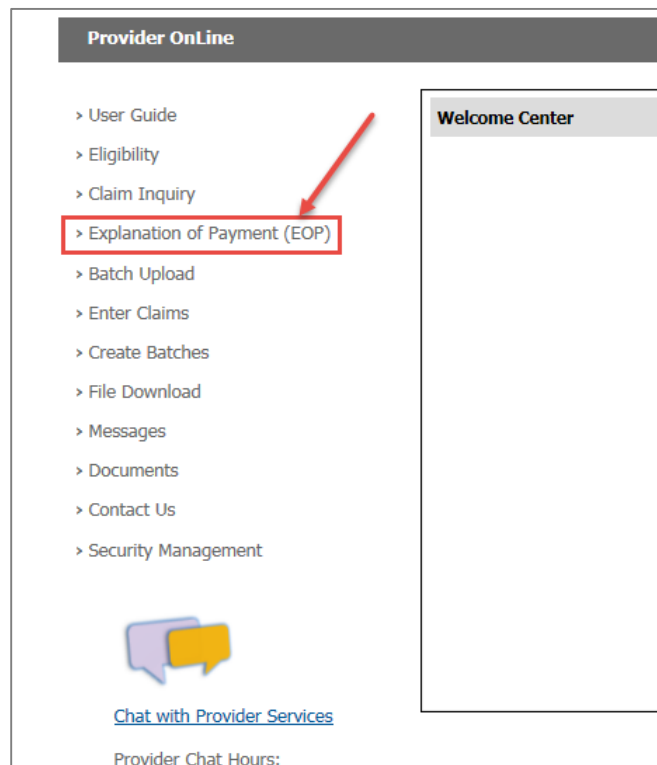To identify a user's OAA, click the Preferences link in the upper right of the homepage (see Figure 2).

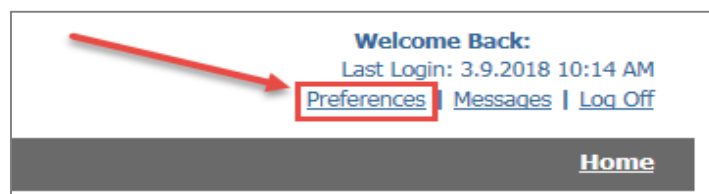*Figure 1: Access the Explanation of Payment Component*

Figure 2: Link to Identify User's OAA

2.1. Specify Search Criteria

There are several different options that can be used to search for Explanation of Payment (EOP) documents (see Figure 3). These options may be specified independently, or in combination with each other, but only the selection of a V-Code is a required input. If a user only has access to one V-Code, it will appear as the default selection in the Select Security Setting: input box. If the user has access to more than one V-Code, they will be presented as dropdown options in that input box.

It is important to understand that multiple V-Codes are associated with Fee-for-Service (FFS) numbers. Even though a specific V-Code is selected in the search criteria, the EOPs that will be returned in the search may include EOPs that are identified by other V-Codes associated with the same FFS Number.

Figure 3: Explanation of Payment (EOP) Search

V-Code access at the Group Level is required to view EOP documents. If V-code access has been assigned at the individual provider level, these choices will appear in the drop down, but if selected, will trigger a warning message that access is not permitted (see Figure 4). Contact your OAA to obtain correct access privileges. If you don't know who your OAA is, you can retrieve that information by clicking the Preferences link in the top right of the page (see Figure 2).

Figure 4: Error Message When Incorrect Access is Assigned

EOPs created after 1/1/2018 are available from the site. If a user requires an EOP document older than this date, they are available by contacting Provider Services. Specifying a Date Range is a useful way to narrow the EOP documents returned in a search. The range start date defaults to one year prior to the current date. The range end date defaults to the current system date. Either date may be changed by directly typing in the input box, or by clicking on the calendar icon located next to the box and selecting a date from the popup that appears.

If the user wishes to retrieve an EOP document associated with a specific Check Number or Electronic Funds Transfer (EFT) Number that may be specified in the EFT or Check No: box. No searches are done to retrieve EOP documents based on a partial input of this field. This must be an exact match, if specified.

Finally, the user may enter a specific dollar amount associated with the EOP document by inputting that in the Amount: box. Be sure to specify a decimal in the number, as this requires an exact match to return the EOP document.

Use the Search button to initiate a search based on the criteria entered. The Clear button erases all the search criteria specified and allows the user to correct this input.

IF EOP documents are temporarily unavailable, a message displays (see Figure 5) instructing the user to try again later. If this condition persists, please call Provider Services for assistance.

Figure 5: Message to User When EOP Documents Are Temporarily Unavailable

2.2. Select an EOP to View

EOP documents that meet the search criteria specified are listed in a table format which appears after clicking the Search button (see Figure 6). The documents are sorted by run date and run time, then by EOP type, all sorted in descending order. If a different sorting is desired to find an EOP, that can be accomplished by clicking one of the small triangles in the column headings of the table. Clicking the downward facing carat, sorts that column in descending order. Clicking the upward facing carat sorts that column in ascending order.

Run Date	Run Time	EOP Type	Check / EFT Number	Amount
2017-01-20	12:30:02	999-Notfound	CHK 1033256	$ 1,432.00
2017-01-20	12:30:02	999-Notfound	EFT 5364378374	$ 4,325.12
2017-01-20	12:30:02	850-BenefitMgmtASO	CHK 945	$ 500.22
2017-01-20	12:30:02	850-BenefitMgmtASO	EFT 326727764	$ 40.22
2017-01-20	12:30:02	250-HealthPlan	CHK 2278846	$ 13,231.25
2017-01-20	12:30:02	250-HealthPlan	EFT 2352539308	$ 1,330,101.25
2017-01-19	12:40:03	850-BenefitMgmtASO	EFT 23555508	$44,123.22
2017-01-19	12:40:00	850-BenefitMgmtASO	NOCHECK	- $ 2,000.06

Figure 6: EOP Document Listing Returned from the Results of a Search

The final two columns listed, specify the Check Number / EFT Number and the total Amount of the EOP.

Clicking on the Run Date / Run Time link in one of the rows, opens the EOP document in a new tab. This link is indicated in Figure 6 by the red arrow.

Adobe Acrobat Reader, or other software that permits the user to view a document in PDF format is required.

Some providers who utilize only computerized claims processing through Electronic Data Interchange (EDI) methods may have opted out of receiving paper Explanation of Payment documents from the health plan. In this case, PDF versions of their EOPs are not available online.

2.3.   View an EOP

Upon selecting the link to view an EOP, a popup window displays (see Figure 7) with the PDF version of the information.

Figure 7: Sample EOP

2.4. Save or Print an EOP

Using your cursor to hover in the dark gray area at the top of the popup reveals options to save, print, magnify or shrink the view of the EOP, or display other options through the Adobe Reader Toolbar (see Figure 8).
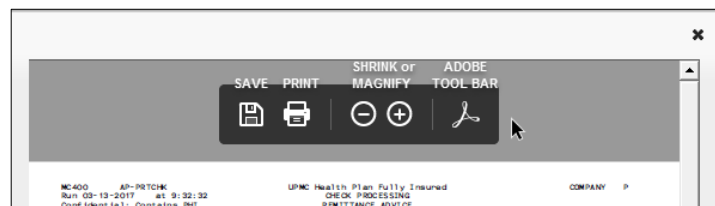

Figure 8: Reveal EOP Options

Users may navigate to other modules of the tool at any time during any of these steps by using the main navigation links on the left side of the page.

2.5. Search Within the EOP

Make sure the latest version of Adobe Acrobat Reader DC is available to access the additional functionality described in this section. The most current download is available at https://get.adobe.com/reader/.

Opening an EOP document and clicking on the Adobe Tool Bar option (see Figure 8) provides additional functionality. This frames the open EOP with icons that permit searching for content and annotating text (see Figure 9). Only two of the features expected to be most commonly used are briefly described in this manual. For more details and further explanation of other icons, please refer to the most current Adobe Reader documentation.

If after downloading the most recent version of Adobe Reader the additional features described in the following sections do not display upon clicking the Adobe Tool Bar icon, chose the download icon ⬇ in the top right of the EOP display window and open the PDF to display the features described in the following sections of this document.

2.5.1. Search for content

Click the Magnifying Glass icon to open a search dialog input box (see Figure 9a). Type the member ID, claim number or other information in the box followed by the Enter key. If the search term is found in the document, it will be highlighted in the content below, even if it is on another page of the document. If the search returns multiple occurrences in the document, use the Next and Previous buttons to jump to each occurrence. If the search term is not found in the document, that will be indicated by a Not Found message.

The Adobe Search Dialog Input box also opens if the user presses CRTL+F while the EOP PDF is open.
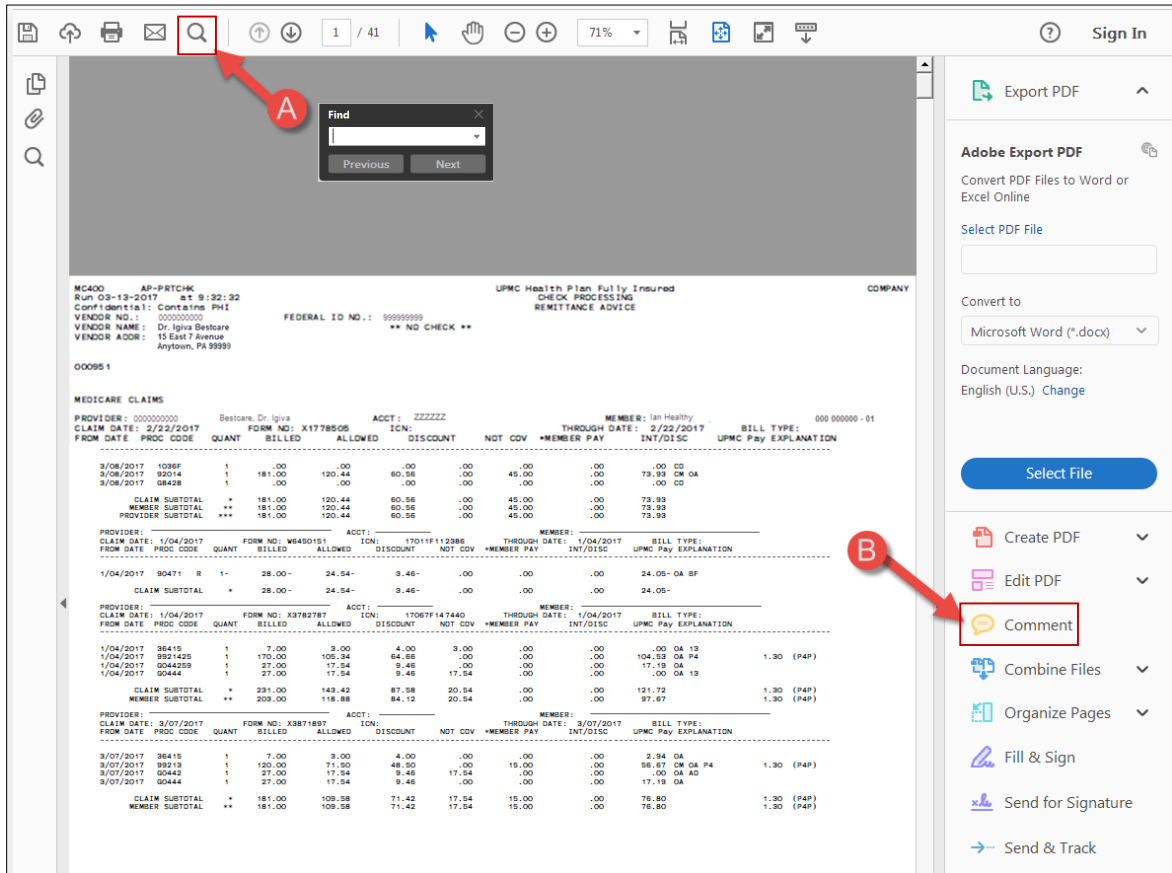
Figure 9: Search and Annotate an Explanation of Payment Document

    a. **Search:** Click the Magnifying Glass icon to search the open EOP PDF content

    b. **Annotate:** Click the Comment icon to highlight, insert comments and perform other annotations in the EOP

2.5.2. Annotate the EOP

The Comment icon (see Figure 9b) is used to highlight and insert comments directly in the EOP document. Multiple options are offered through this icon (see Figure 10), but only three will be further explain in this document.
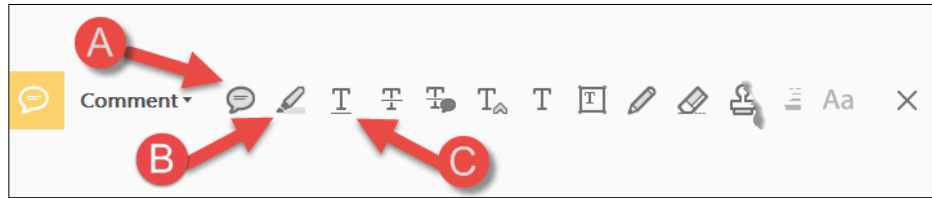
Figure 10: Comment, Highlight and Underline the EOP

a. **Sticky Note:** Insert a comment with text
b. **Highlight:** Highlight text
c. **Underline:** Underline text

After clicking the Sticky Note icon, (see Figure 10a) click in the PDF document and type comments in the box that opens.

After clicking the Highlighter icon, (see Figure 10b) click, drag and release while selecting text in the PDF document.

After clicking the Underline icon, (see Figure 10c) click, drag and release while selecting text in the PDF document.

IMPORTANT: If choosing to alter the EOP by applying any of the tools provided by the comments icon, including the ones detailed above, the PDF must be saved on a local computer to save the modifications applied. Users are not permitted to permanently alter the PDF image stored online by the Health Plan.

Click the disk icon ⊟ in the top left corner of Figure 9 to save changes on a local computer.

3. Assign Access to Explanation of Payment Documents

OAAs have the responsibility to assign access to view Explanation of Payment (EOP) documents for users. In doing this, it is important to be mindful of the responsibility associated with granting this permission to personal health information and thereby only provide access to the minimum amount of data required for another to carry out their work duties.

This guide is meant to provide the Online Account Administrator (OAA) with a quick overview of the information necessary to assign access to Explanation of Payment information to their existing users. More detailed information on adding new users and other Security Management features can be found in the on-line Security Management User Guide found in the Documents and Forms section within the online portal.

Some providers who use only computerized claims processing through electronic data interchange (EDI) methods may have opted out of receiving paper EOP documents from the health plan. In this case, PDF versions of their EOPs are not available online.

3.1. User Security Management

OAAs must grant a user access to view EOP documents. This is accomplished through the Security Management component, by selecting that option from the main navigation menu shown on the left side of the home page, upon log in (See Figure 10).
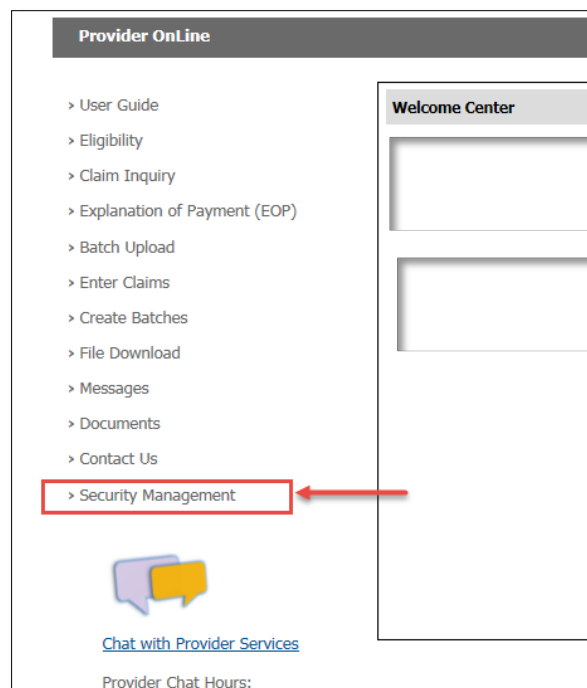
Figure 10: Select the Security Management Component

3.1.1. Select User

This guide assumes the OAA has already set up users with access to the Provider OnLine portal. To assign access to Explanation of Payment documents to a user, select the Modify User Permissions option from the Security Management page. (see Figure 11).

A list of users currently set up under the OAA's security umbrella will display (see Figure 12). In

Figure 11: Select Modify User Permissions

some cases, the OAA may administer security for many users. Input a full or partial name or user ID to filter and narrow the list of users presented, if needed. Once the user is located, click on the Select link next to the name

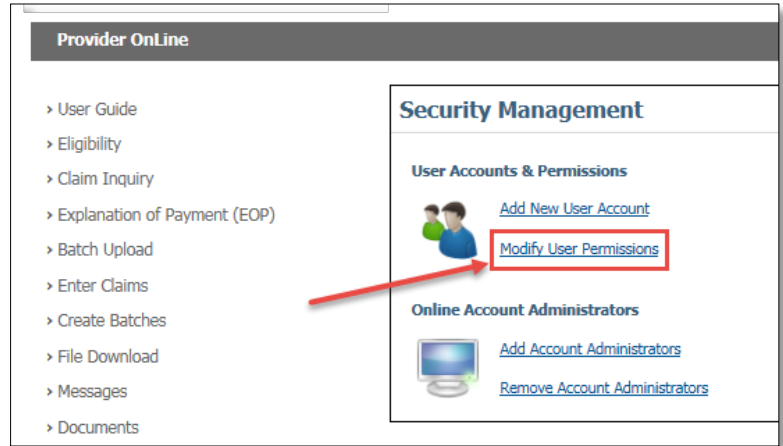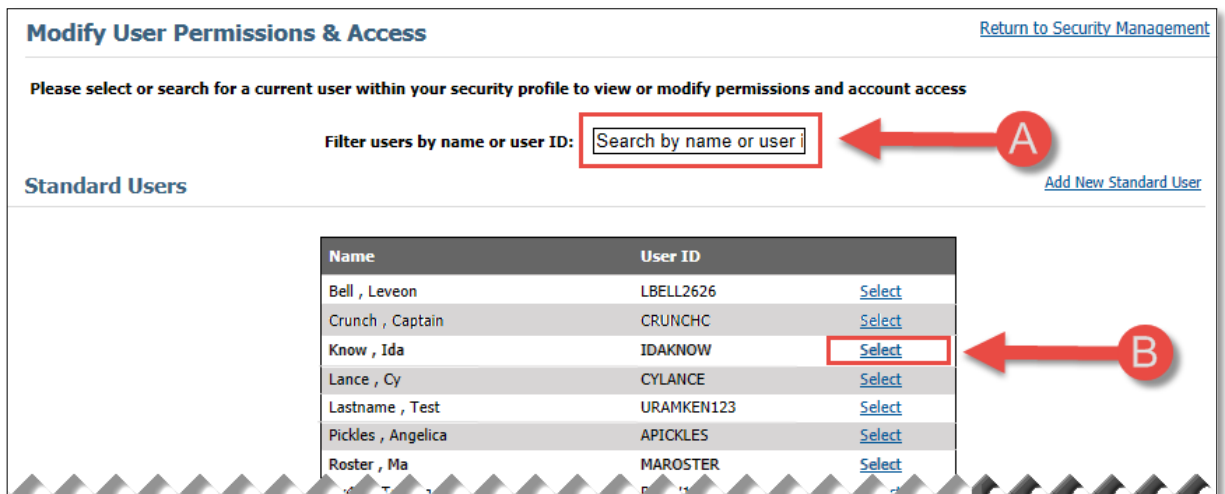to open the user's security profile for modification.

Figure 12: Select a User

a. **Filter Users:** Narrow the list of users displayed by supplying a full or partial name or user ID.
b. **Select User:** Click to open the user's security profile.

Assign Explanation of Payment Access

The user's current access privileges are displayed (see Figure 13). If a user has been assigned more than the standard access, this will be indicated by a "✓" entry in the box corresponding to the permission in the "Access?" column.

To permit a user to view Explanation of Payment documents, click on the box across from this option, which populates a checkmark in the box.

Click on the "Next" button to continue.

Modify User Permission & Access

Name:
User ID:
Account Status: Active (Deactivate)
E-mail:
Work Phone:

Standard Access

Permission	Access?
Medical Claims Submission	✓
Medical Claims View	✓
Explanation of Payment	✓

Cancel   Next

Figure 13: Assign Explanation of Payment Access

3.1.2.   Specify Access by V-Code

OAAs are accustomed to defining access to Provider OnLine components by V-code and Site IDs at the Group or Individual Provider ID level. Since EOP documents are identified by a Fee-for-Service (FFS) Vendor number, it is important for an OAA to understand the implications of how access is assigned.

The only correct way to grant EOP access is to assign Group Level access at the V-Code level. Provider OnLine will extend that access to all the V-codes associated with the FFS Vendor Number.

OAAs should avoid assigning V-code access at the Individual Provider Level for EOP documents, as this will not extend the access required and will trigger an error for the user if they search for an EOP for V-codes assigned at that level.

A page like that shown below (see Figure 14) allows the OAA to select the V-Codes the user needs by clicking the Group Access radio button on the Vendor # – Group Name line.

Click on the Next button, to continue, after specifying all the desired vendors.

Figure 14: Assign V-Code Access

3.1.3. Review and Confirm Access

A summary of the access permissions selected is presented for final review. Click the + in front of VCODE Identifiers for selected application(s) to expand and display all the V-Codes selected in the previous step. The + will change to - when that section expands. (see Figure 15)

Click the Cancel or Save button to either abort or save your selections respectively.

Figure 15: Review Access

4. Questions and Support

4.1. Search Criteria Yields no Results

If the results of an EOP search yield no results, this could be due to any of the following factors:

1. No EOPs match the search criteria.

   Resolution: Examine the search criteria carefully to confirm input exactly matches the intended sort criteria.

2. The user's access is not set correctly.

   Resolution: User should contact their OAA to confirm access to EOPs is set at the V-Code Group Level.

3. The EOP module is offline due to maintenance or some other technical issue.

   Resolution: Please look for pop-up, homepage, or EOP module messages that indicate a service interruption. If none are apparent, please notify Provider Services.

4.2. User Questions

Users should direct access questions to their OAA. To identify your OAA, click the Preferences link in the top left of the page (see Figure 2).

4.3. OAA Security Questions

An OAA should direct questions to Provider Services.

4.4. General Questions

Questions concerning the content of a specific Explanation of Payment document, should be directed to Provider Services.