7/3/2019

CRXIS Online

Quick Guide

CollectRx

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Application Overview

The CRXIS Online application allows users to view key metrics, reports, as well as take critical actions such as sending documents to Collect Rx.

One of the key advantages of CRXIS Online is authorized users can view the invoices for services rendered and make payments directly through the portal

Organization of the User Guide

The user guide consists of two sections: Getting Started and Using the Application.

Getting Started section explains how to activate user account, logging in, and logging out of application, and resetting/changing user password.

Using the Application section provides a detailed description of the application features and how to use/benefit from each feature.

Recommended Browsers

Google Chrome: Latest Version
Internet Explorer: Latest Version
Firefox: Latest Version

User Access

Users are provisioned access at client level.

1.0 GETTING STARTED

Getting Started section explains CRXIS Online portal account activation, logging into the portal, changing password, and logging out of the portal.

1.1. Account Activation

All first-time registered users will receive an Account Activation email. Click on the 'Activate' link at the bottom of the email to complete your account activation.

Follow the guidelines that follow to set up username and password to login into CRXIS Online portal.

1.2. Logging In

To access the CRXIS Online portal, click on the below URL or type the URL into one of the recommended browsers.

CRXIS Online URL: https://portal.collectrx.com/

See Section Recommended Browsers for more information on the recommended browsers.

When prompted with the Login screen, enter the username and password credentials you provided during account activation.

If you have forgotten your password, you can reset your password by clicking on the Forgot password link on the login screen.

On successfully logging in, you will land on the Dashboard page.

1.3. Changing Password

See Section Change Password for information on changing password.

1.4. Logging Out

It is recommended you log out of the CRXIS Online portal when not using it. To log out of the portal, click on the Log Out link on the top right corner of any screen.

2.0 USING THE APPLICATION

This section provides a detailed description of the application features. Use the left menu to navigate through the various sections available in the portal.

Each of the available menu item is described in detail below.

2.1. Dashboard

When you log into the portal, you land on the Dashboard.

Select the time period for the metrics. Four options are available to choose from. Metrics for the last month, Month To Date (MTD), last six months, or Year To Date (YTD).

The information shown on the Dashboard is specific to your access. A brief description of each of the dashboard components is available below.

2.1.1. Collect Rx Dollars (Tile)

This tile shows the total collections by Collect Rx on Appeals and Negotiations cases for the selected time period.

2.1.2. Document Requests (Tile)

Document Requests tile shows the count of open document requests for the client. The fewer the number of open requests the better to enable Collect Rx to have increased success with payor negotiations.

Click on More Info to see the details of all open document requests. See Section Document Requests for more information on the open document requests and how to fulfill the request.

2.1.3. Balance Due (Tile)

Balance Due tile shows the total balance due to Collect Rx for the services rendered. It also shows the number or count of unpaid invoices that make up the balance due amount.

Click on More Info to see the details of the invoices and make payment. See Section Invoice for more information on the invoices and how to make payment.

2.1.4. Collect Rx Dollars (Chart)

The pie chart correlates to the Collect Rx Dollars tile and depicts the total collections by Collect Rx on Appeals and Negotiations for the selected time period. It shows the collections break-up by Appeals and Negotiations.

2.1.5. Case Count (Chart)

The line chart depicts by Case Type (Appeal vs. Negotiation) the number of cases opened during the selected time period. Depending on the time period selected, it either shows a weekly or monthly distribution.

2.1.6. Negotiation % By Claim Type (Chart)

The column chart is based on the final payment Collect Rx negotiated on successful Negotiation cases. It depicts the percentage of billed charges by Claim Type (Special Bill Type) for the time period selected.

2.1.7. Appeal Initial Payment vs Additional Payment (Chart)

The column graph depicts the total 'Found Money' (collections) on Appeals for the time period selected. It shows the Initial Payment and the Additional Payment collected by Collect Rx.

2.2. Search

Click on the Search menu item on the left to search for a specific case or patient.

2.2.1. Search Case Information

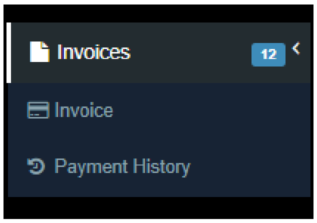
Search for a patient by typing in the patient's partial or full name. Select the patient you want to see more information for and click on the Search button.

To search for other patients, click on Clear button and type the name of the other patient.

Additional command options are available at the far right of the results. Click on to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

2.3. Invoices

Invoices menu item on the left panel allows you to navigate to the open/pending Invoices and the Payment History. At quick glance, you can see the count of open/pending invoices in blue badge.



Click on Invoice sub-menu item to navigate to the details of the open/pending invoices. See Section [Invoice](#) for more information.

Click on Payment History sub-menu item to navigate to the details of the past payments. See Section [Payment History](#) for more information.

2.3.1. *Invoice*

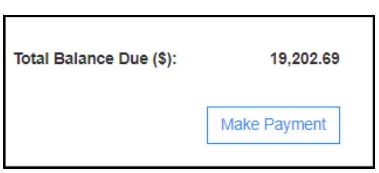
You can view the details of the open/pending invoices by clicking on Invoice.

Note that past due invoices appear in red font. If you see any invoice in red font, please make a payment immediately to avoid any late fees.

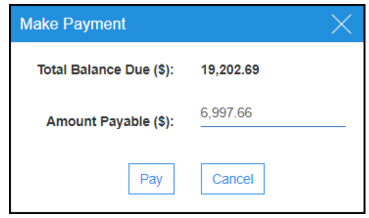
Additional command options are available at the far right of the results. Click on [download icon] to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

Invoice screen allows you to make payments for open/pending invoices.

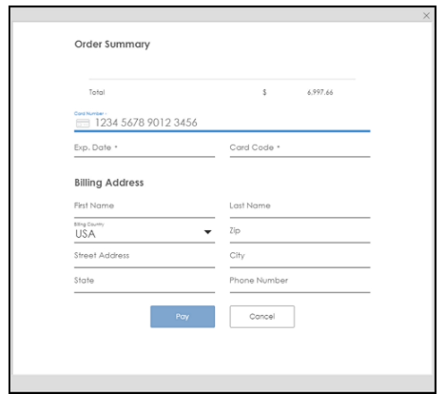
Select one or more invoices and click on Make Payment to begin payment transaction.



Confirm the Amount Payable ($) in the following screen and click on Pay.



Enter the billing information in the next screen and click on Pay to complete the payment transaction.



2.3.2. *Payment History*

All past payments made via CRXIS Online can be accessed in the Payment History page.

Additional command options are available at the far right of the results. Click on [download icon] to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

2.4. Reports

All available reports can be accessed by clicking on the Reports menu item on the left panel.

Each of the available report is described in the following sections.

2.4.1. *Open Appeals*

This report is a list of all open appeals cases.

Additional command options are available at the far right of the results. Click on [download icon] to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

2.4.2. *Open Negotiations*

This report is a list of all open negotiation cases.

Additional command options are available at the far right of the results. Click on to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

2.4.3. *Closed Appeals*

This report is a list of all closed appeals cases.

By default, the report lists all closed appeals cases. To narrow down the results to a specific date range, pick a Service Start Date and Service End Date. Alternatively, either select MTD (Month-To-Date) or YTD (Year-To-Date) for searching.

MTD: Selecting this will default the Service Start Date to 1st of the current month and Service End Date to the current date.

YTD: Selecting this will default the Service Start Date to Jan 1st of the current year and Service End Date to the current date.

DOS Start: Date Range criteria is Date of Service.

Close Date: Date Range criteria is Closed Date.

Additional command options are available at the far right of the results. Click on to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

2.4.4. *Closed Negotiations*

This report is a list of all closed negotiation cases.

By default, the report lists all closed appeals cases. To narrow down the results to a specific date range, pick a Service Start Date and Service End Date. Alternatively, either select MTD (Month-To-Date) or YTD (Year-To-Date) for searching.

MTD: Selecting this will default the Service Start Date to 1st of the current month and Service End Date to the current date.

YTD: Selecting this will default the Service Start Date to Jan 1st of the current year and Service End Date to the current date.

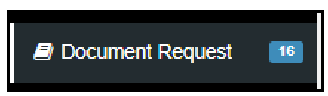
DOS Start: Date Range criteria is Date of Service.

Close Date: Date Range criteria is Closed Date.

Additional command options are available at the far right of the results. Click on to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

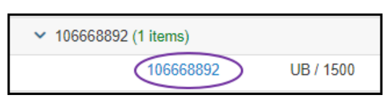
2.5. Document Requests

Document Requests menu item on the left panel allows you to navigate to the current open document requests from Collect Rx. At quick glance, you can see the count of open requests in blue badge.



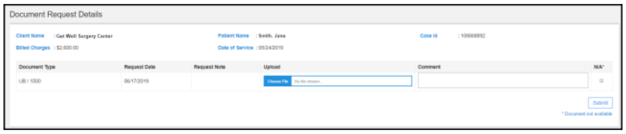
Additional command options are available at the far right of the results. Click on to see additional commands available. This control allows you to show or hide the fields displayed in the results. It also allows to export the results to CSV.

Case Id is a hyperlink and can be seen in blue color font.



Click on the link to navigate to the Request Details page.

Document Request Details page allows you to fulfill the document requests in a secure and easy way.



To send the requested document to Collect Rx, click on Choose File. Select the document you would like to send. Enter any pertinent comments you would like to and click on Submit button.

If the requested document is not available currently and will not be available in the requested timeframe, select N/A and click Submit. This will notify the Collect Rx team that the requested document is not available, and they should proceed without it.

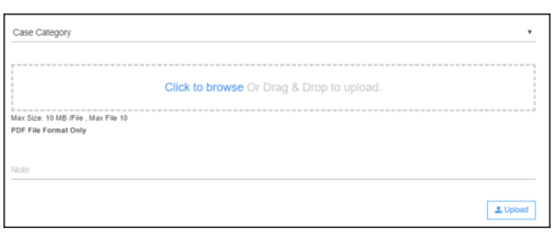
If more than one document request is associated with a case, you can attach documents to each of the request and click Submit. This will fulfill multiple requests together.

Alternatively, if document for only of the requests is available, you can send one document and come back to the case subsequently to fulfill the other pending requests.

2.6. Claims

Claims menu item on the left panel allows you to send any documents to Collect Rx in a secure and easy way instead of emailing or faxing them.

Clicking on Claims menu will land you on the Document Upload page.



Select the Case Category (Appeal or Negotiation). Add documents by either browsing your computer or dragging and dropping and click on Upload. You can add an optional note when sending the documents.

Only PDF files can be uploaded. When you add more than one file, the documents will be merged when transmitted to Collect Rx. This significantly streamlines the operational process. For example, you can send UB and EOB documents together and these will be merged together as one case.

Do not send documents for different patients together.

2.7. Preferences

Navigate to Preferences menu item to change your login password at any time.

2.7.1. Change Password

To update your password, click on Change Password menu item under Preferences.

Enter current password and the new password and click on Update to change the password.