eMEDIX VAR Guide

Introduction

Purpose:

The purpose of this document is to outline the end-to-end eMEDIX process in a single location.

Prerequisites:

·   The VAR customer must exist in SAP. If the customer does not already exist, the VAR will create a lead which will be converted into a VAR Customer by the   VAR Sales Executive.

·   eMEDIX orders should be submitted under the VAR Customer account.

·   All eMEDIX orders are required to have an Implementation service.

·   Adding a database to an existing eMEDIX account requires a new order.

This document should guide you through completing the following processes:

·   Creating a New or Add-on eMEDIX order

·   Transitioning between Per Transaction and Per Provider

·   Removing a Provider from an Existing eMEDIX Contract

·   Cancelling an eMEDIX Contract

·   eMEDIX Implementation Guide

New and Add-on Orders

When adding a new provider to an existing contract, the billing type must coincide with the existing contract. For example, if the practice is already setup as Per Transaction, the new provider cannot select a Bundled package, and vice versa. The billing type must be like for like.

Per Provider:

If the client is setup as Per Provider, then the billing is based upon the provider's unique credentialing ID, and this requires a new order.
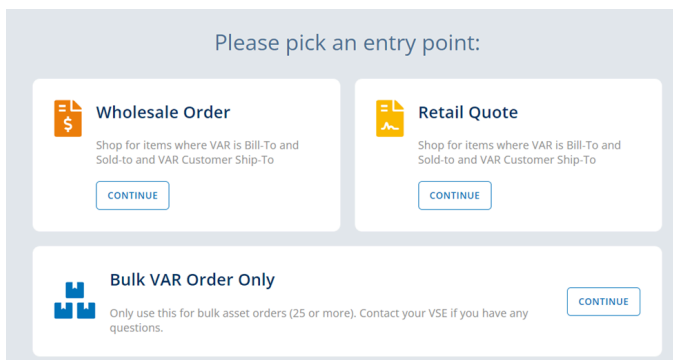
Per Transaction:

If the customer is setup with a Per Transaction contract, then the VAR can add or remove providers through the EZ Enroll dashboard at will. In this scenario the VAR has more control since the billing is based upon the number of transactions rather than the number of providers.

Conversely, if you are adding a provider to an existing contract, the add-on provider must enroll for the same service(s) as the existing provider. The order should include a list of the existing service(s) IE Claims, ERAs, RTE, etc.

1.   The VAR will login to the CGM Portal

2.   From the Home Page of the VAR Portal **click Order Wizard.**
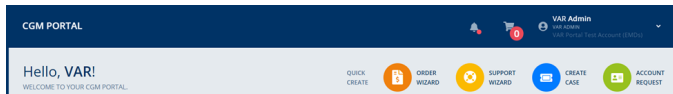
3.   Select either **Wholesale Order or Retail Quote** as the entry point.

4.   **Select from the list** of accounts displayed.

VAR Customer Wholesale Name2	Austin, US	SELECT →

5.   Select eMEDIX and **Click Continue**

SELECT PRODUCT		
CGM APRIMA CONTINUE	**CGM LYTEC** CONTINUE	**CGM MEDISOFT** CONTINUE
CGM PLUS CONTINUE	**CGM PRACTICE PARTNER** CONTINUE	**eMEDIX** CONTINUE

6.   The eMEDIX product list will then be displayed. Select the desired quantity, then **Click Add to Cart.**

Note, that all New and Add-On eMEDIX Services require Implementation. An Implementation Guide cam be found at the end of this document.

7.   Include the **following details in the Notes section**. If this information is missing\inaccurate we will be unable to proceed with the order and this could result in a delay.
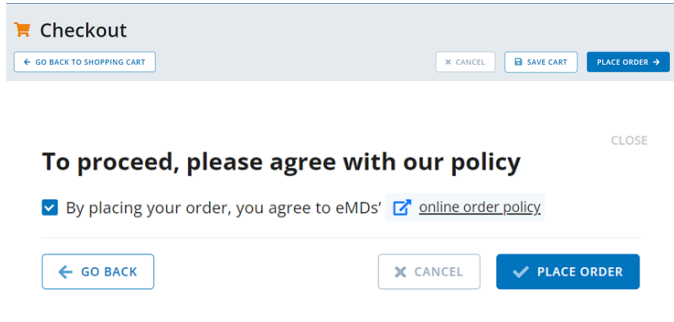
a)   Number of Providers

b)   Provider Name

c)   Number of Databases

d)   Product Family (i.e., Medisoft, Lytec, Aprima)

e)   Client Name

f)   Billing Service Name if applicable

g)   Order Type (New or Add-on)

8.   Now that you are satisfied with your selection, **Proceed to Checkout**
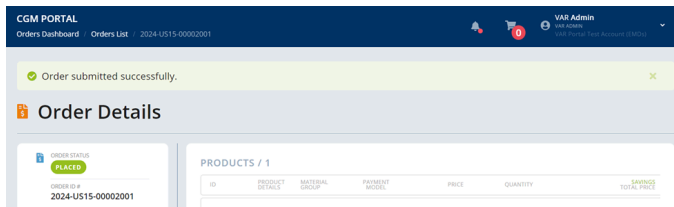
9. Once you have confirmed the order details, **Click Place Order**

10. You will receive an **on-screen alert** after the order is submitted

INTERNAL ONLY

Order Management Workflow

1. While reviewing the order for accuracy Customer Operations will change the order status to "IN PROCESS".

2. If the order is incomplete the order status is changed to "INCOMPLETE" and the VAR will be notified of any outstanding item(s).

3. Customer Operations will assist the VAR with resolving any outstanding items until all ordering prerequisites are met.

4. If there are any upfront fees due, the order status should be changed to "TO BE VALIDATED'.

5. Otherwise, Customer Operations will change the order status to "RELEASED" and create the Follow Up items.

6. Customer Operations will create the Service Order as a Follow Up

a. If there are any attachments, Customer Operations will download and attach a copy to the Service Order.

7. Customer Operations will list all the eMEDIX items products purchased in the Notes section and change the status of the Service Order "To Be RELEASED".

8. The CGM Service Manager will assign the Service Ticket to an implementation consultant.

9. The Implementation Consultant will change the status to "READY FOR BILLING"

10. Customer Operations will create a Complaint Ticket to cancel the original eMEDIX service.

11. Customer Operations will create a Task to update the Pricing Engine.

a. Description should resemble **CX - eMEDIX All Srvs 9/30/23

b. Include Product Family

c. Task assigned to Christine Boos

12. Once this is done, the Complaint Ticket can be closed, and all remaining activity should be tracked through the Task.

13. Customer Operations will update the Contract Start Date of the Service Order in accordance with the CGM 1st day of the month policy.

14. Customer Operations will then update the status of the Service Order to "COMPLETED."

15. Customer Operations will verify\update the Settlement Rules

16. The contract will be billed during the normal CGM US15 invoicing cycle.

Transitioning Between Per Provider and Per Transaction

Annually, with proper advanced notice, upon renewal, a customer can go from Per Provider to Per Transaction. Conversely, a customer can switch from Per Transaction to Per Provider outside of the contract renewal period. If switching from the Per Transaction to Per Provider bundle and vice versa, a new signed contract is required. Since the original contract was for either Per Transaction or Subscription pricing, the VAR\Customer must agree to the new pricing model.

1. The VAR will login to the CGM Portal

2. From the Home Page of the VAR Portal **click Order Wizard.**
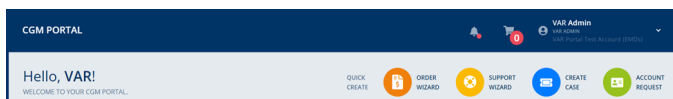
3. Select either **Wholesale Order or Retail Quote** as the entry point.

Please pick an entry point:

Wholesale Order
Shop for items where VAR is Bill-To and Sold-to and VAR Customer Ship-To
CONTINUE

Retail Quote
Shop for items where VAR is Bill-To and Sold-to and VAR Customer Ship-To
CONTINUE

Bulk VAR Order Only
Only use this for bulk asset orders (25 or more). Contact your VSE if you have any questions.
CONTINUE

4.   Select from the **list of accounts displayed.**

VAR Customer Wholesale Name2 — Austin, US — SELECT →

5.   Select eMEDIX and **Click Continue**

SELECT PRODUCT

CGM APRIMA
CONTINUE

CGM LYTEC
CONTINUE

CGM MEDISOFT
CONTINUE

CGM PLUS
CONTINUE

CGM PRACTICE PARTNER
CONTINUE

eMEDIX
CONTINUE

6.   The eMEDIX product list will then be displayed. **Browse the Product Catalog** for the new Per Transaction or Per Provider line items and Select the desired quantity, then Click Add to Cart.

Viewing **10 of 42** Results

| ID	PRODUCT DETAILS	MATERIAL GROUP	PAYMENT MODEL	PRICE	QUANTITY	SAVINGS TOTAL PRICE	
30025358	eMEDIX eMEDIX - 1,000 Claims WS	LICENSE	↻	$54.79 PER MONTH	− 0 +		ADD TO CART
30025361	eMEDIX eMEDIX - 1,000 ERAs WS	LICENSE	↻	$41.61 PER MONTH	− 0 +		ADD TO CART
30025377	eMEDIX eMEDIX - 1,175 Claim Scrubs WS	LICENSE	↻	$33.98 PER MONTH	− 0 +		ADD TO CART

7.   The **following details are required in the Notes section**. If this information is missing\inaccurate we will be unable to proceed with the order and this could result in a delay.

a)   Number of Providers

b)   Provider Name

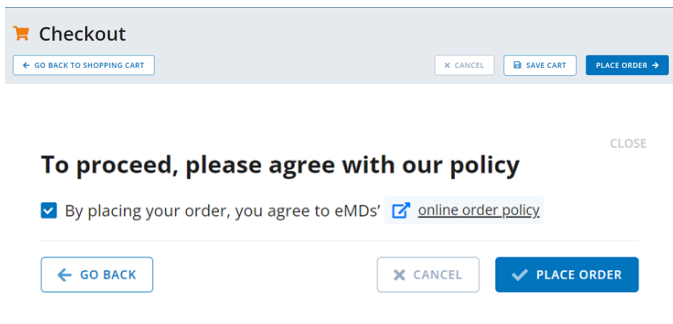c)   Number of Databases

d)   Product Family

e)   Client Name

f)   Billing Service Name if applicable

g)   Order Type – Existing customer switching from per transactional pricing to a per provider bundle.

h)   No implementation services are needed.

8.   Now that you are satisfied with your selection, **Proceed to Checkout**
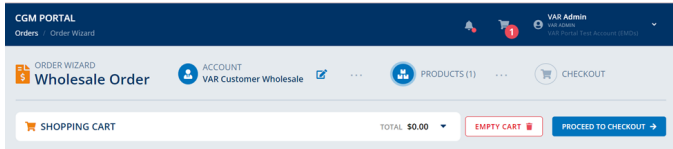
9.   Confirm the order details and **Click Place Order**
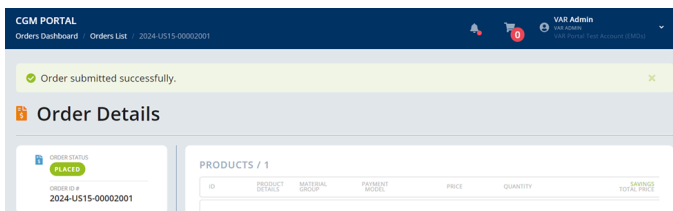
10.   You will receive an **on-screen alert** after the order is submitted

INTERNAL ONLY

Order Management Workflow

1.   While reviewing the order for accuracy Customer Operations will change the order status to "IN PROCESS".

2.   If the order is incomplete the order status is changed to "INCOMPLETE" and the VAR will be notified of any outstanding item(s).

3.   Customer Operations will assist the VAR with resolving any outstanding items until all ordering prerequisites are met.

4. If there are any upfront fees due, the order status should be changed to "TO BE VALIDATED'.

5. Once payment is received, the order status will automatically change to "RELEASED". This will trigger Customer Operations to create the Follow Up items.

6. Customer Operations will create the Service Order as a Follow Up

a. If there are any attachments, Customer Operations will download and attach a copy to the Service Order.

7. Customer Operations will list all the eMEDIX items products purchased in the Notes section and change the status of the Service Order "To Be RELEASED".

8. The CGM Service Manager will assign the Service Ticket to an implementation consultant.

9. The Implementation Consultant will change the status to "READY FOR BILLING"

10. Customer Operations will create a Complaint Ticket to cancel the original eMEDIX service.

11. Customer Operations will create a Task to update the Pricing Engine.

a. Description should resemble **CX - eMEDIX All Srvs 9/30/23

b. Include Product Family

c. Task assigned to Christine Boos

12. Once this is done, the Complaint Ticket can be closed, and all remaining activity should be tracked through the Task.

13. Customer Operations will update the Contract Start Date of the Service Order in accordance with the CGM 1st day of the month policy.

14. Customer Operations will then update the status of the Service Order to "COMPLETED."

15. Customer Operations will verify\update the Settlement Rules

16. The contract will be billed during the normal CGM US15 invoicing cycle.

Removing a Provider

1. The VAR will login to the CGM Portal

2. From the Home Page of the VAR Portal **click Support Wizard.**

3.   Select ADMINISTRATION/ACCOUNT ASSISTANCE
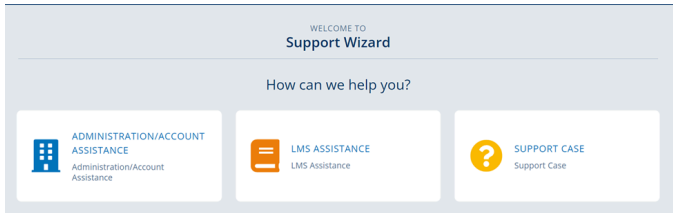
4.   Select the Account in which the request is related to
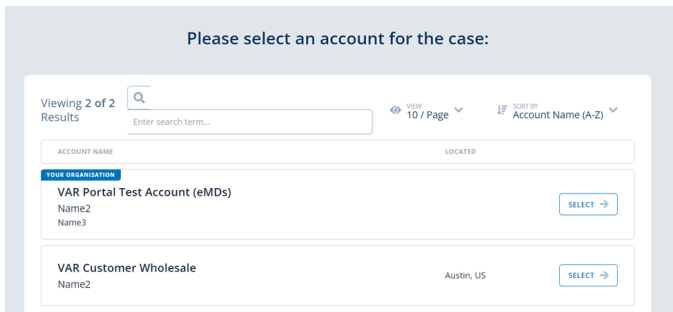
5.   Select Category - Add\Remove Provider
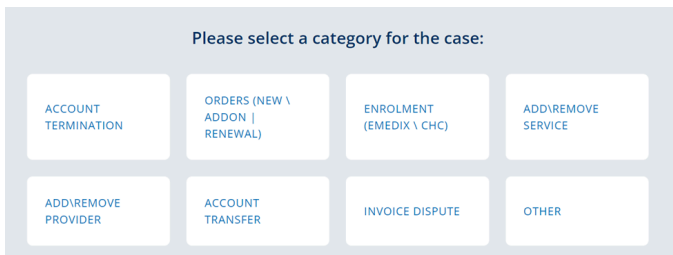
6.   Enter the following information in the detail section and Click Send. If this information is missing\inaccurate we are unable to proceed with the order and this could result in a delay.

a)   Number of Providers

b)   Provider Name

c)   Number of Databases

d)   Provider Name

e)   NPI Number

f)   Effective Date

INTERNAL ONLY

Order Management Workflow

1.   Customer Operations will review the contractual obligations of each request to confirm the effective date to remove provider.

2.   Customer Operations will create a Task to update the Pricing Engine.

a.   Description should resemble **CX - eMEDIX All Srvs 9/30/23

b.   Include Product Family and all of the relevant details provided from the VAR

c.   Task assigned to Christine Boos

3.   Once this is done, the Complaint Ticket can be closed, and all remaining activity should be tracked through the Task.

4.   Customer Operations will notify the VAR of the confirmed effective date.

5.   Customer Operation will submit a separate account termination template to Dawn Taylor for each request.

6.   Dawn Taylor will share the details with Navid Asgari and Benedikt Brueckle

Cancellation Process

1.   The VAR will login to the CGM Portal

2.   From the Home Page of the VAR Portal **click Support Wizard.**

3. Select **ADMINISTRATION/ACCOUNT ASSISTANCE**

WELCOME TO
Support Wizard

How can we help you?

ADMINISTRATION/ACCOUNT ASSISTANCE Administration/Account Assistance	**LMS ASSISTANCE** LMS Assistance	**SUPPORT CASE** Support Case

4. **Select the Account** in which the request is related to

Please select an account for the case:

Viewing 2 of 2 Results   Enter search term...   VIEW 10 / Page   SORT BY Account Name (A-Z)

ACCOUNT NAME   LOCATED

YOUR ORGANISATION

VAR Portal Test Account (eMDs)
Name2
Name3   SELECT →

VAR Customer Wholesale
Name2   Austin, US   SELECT →

5. Select Category - **Add\Remove Service**

Please select a category for the case:

ACCOUNT TERMINATION	ORDERS (NEW \ ADDON | RENEWAL)	ENROLMENT (EMEDIX \ CHC)	ADD\REMOVE SERVICE
ADD\REMOVE PROVIDER	ACCOUNT TRANSFER	INVOICE DISPUTE	OTHER

6. Enter the **following information in the detail section**. If this information is missing\inaccurate we are unable to proceed with the order and this could result in a delay.

a) Type of Cancellation (Pre-Implementation / Partial / Full)

b) Effective Date

c) Account Name

d) Account TPID

INTERNAL ONLY

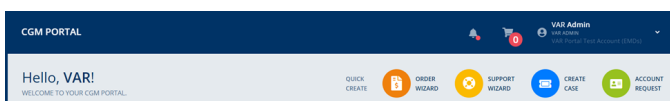**Order Management Workflow**

1. Customer Operations review the contractual obligations of each request to confirm the effective date to terminate

service.

2.   Customer Operations will create a Complaint Ticket to cancel the eMEDIX service.

3.   Customer Operations will create a Task to update the Pricing Engine.

a.   Description should resemble **CX - eMEDIX All Srvs 9/30/23

b.   Include Product Family

c.   Task assigned to Christine Boos

4.   Once this is done, the Complaint Ticket can be closed, and all remaining activity should be tracked through the Task.

5.   Customer Operations will ensure eMEDIX is removed from any future contracts

6.   Customer Operations will notify the VAR of the confirmed effective date.

7.   Customer Operation will submit a separate account termination template to Dawn Taylor for each request.

8.   Dawn Taylor will share the details with Navid Asgari and Benedikt Brueckle
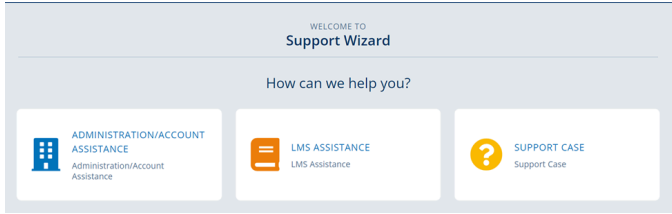
Implementation Guide
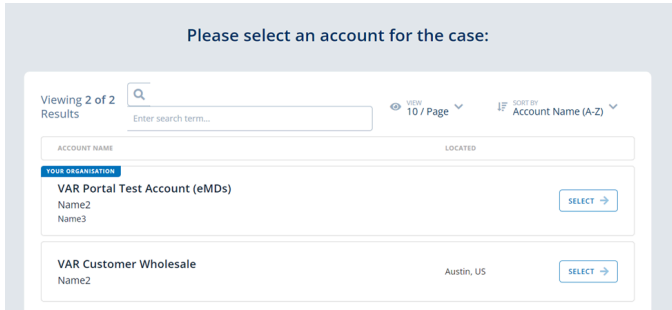
Product	Implementation Service - New Orders	Implementation Service - Ad
30025313 - eMEDIX - 500 Claims/Remits/ Eligibility RT	40021020 - eMEDIX - eBundle Implementation RT	40021030 - eMEDIX - Add-On Setup RT
30025314 - eMEDIX - 500 Claims/Remits RT	40021020 - eMEDIX - eBundle Implementation RT	40021030 - eMEDIX - Add-On Setup RT
300025315 - eMEDIX - 200 Claims/Remits/ Eligibility RT	40021020 - eMEDIX - eBundle Implementation RT	40021030 - eMEDIX - Add-On Setup RT
30025316 - eMEDIX - 500 Claims RT	40021021 - eMEDIX - Claims Implementation RT	40021030 - eMEDIX - Add-On Setup RT

30025317 - eMEDIX - 1,000 Claims RT	40021021 - eMEDIX - Claims Implementation RT	40021030 - eMEDIX - Add-On Setup RT
30025318 - eMEDIX - 500 ERAs RT	40021022 - eMEDIX - ERA Only Implementation RT	40021022 - eMEDIX - ERA Only Implementation RT
30025319 - eMEDIX - 200 ERAs RT	40021022 - eMEDIX - ERA Only Implementation RT	40021022 - eMEDIX - ERA Only Implementation RT
30025320 - eMEDIX - 1,000 ERAs RT	40021022 - eMEDIX - ERA Only Implementation RT	40021022 - eMEDIX - ERA Only Implementation RT
30025321 - eMEDIX - 500 Real Time Eligibility RT	40021023 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibility Prov. Setup
30025322 - eMEDIX - 1,000 Real Time Eligibility RT	40021023 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibility Prov. Setup
30025323 - eMEDIX - eClaims er Transaction RT	40021021 - eMEDIX - Claims Implementation RT	400210230 - eMEDIX - Add-On Setup RT
30025324 - eMEDIX - Electronic to Paper Claims RT		
30025325 - eMEDIX - ERAs per Transaction RT	40021022 - eMEDIX - ERA Only Implementation RT	40021022 - eMEDIX - ERA Only Implementation RT
30025326 - eMEDIX - Eligibility per Transaction RT	40021023 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibility Prov. Setup
30025327 - eMEDIX - Claim Status Inquiry RT		
30025328 - eMEDIX - Revenue Resolve Denial RT	40021026 - eMEDIX - Revenue Resolve Setup RT	

30025329 - eMEDIX - PRE-Confirm per Transaction RT

30025330 - eMEDIX - PRE-Confirm per Provider RT

30025331 - eMEDIX - Electronic Claim Attachment RT

30025332 - eMEDIX - Print/Mail Claim Attachment

30025333 - eMEDIX - 200 Claims RT	40021021 - eMEDIX - Claims Implementation RT	40021030 - eMEDIX - Add-On Setup RT
30025334 - eMEDIX - 200 Real Time Eligibility RT	40021023 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibilit Prov. Setup

30025335 - eMEDIX - Claim Scrub per Claim RT

30025336 - eMEDIX - 1,175 Claim Scrubs RT

30025337 - eMEDIX - 75O Claim Scrubs RT

30025338 - eMEDIX - Claims Scrubbing with Aria

30025339 - eMEDIX - Revenue Resolve with Aria	40021042 - eMEDIX - Revenue Resolve Setup WS

30025340 - eMEDIX - Claim Status Inquiry with Aria

30025341 - eMEDIX - Paper EOB-to-ERA per

Claim

32000578 - eMEDIX - Duplicate EDI Claim File Maint.		
30025342 - eMEDIX - EDI for Inclusive Bundle		
30025343 - eMEDIX - 500 Bundle RT	40021020 - eMEDIX - eBundle Implementation RT	40021030 - eMEDIX - Add-On Setup RT
30025344 - eMEDIX - EDI for Inclusive Bundle VAR		
30025345 - eMEDIX - Statements per Transaction		
30025346 - eMEDIX - Collection Letters per Trans		
30025347 - eMEDIX - Statements per Trans RT		
30025349 - eMEDIX - 500 Claim/Remit/ Eligibility RT	40021020 - eMEDIX - eBundle Implementation RT	40021030 - eMEDIX - Add-On Setup RT
30025350 - eMEDIX - 500 Claim/Remit/ Eligibility WS	40021036 - eMEDIX - eBundle Implementation WS	40021045 - eMEDIX - Add-On Setup WS
30025351 - eMEDIX - 500 Claim/Remit/ Eligibility WS	40021036 - eMEDIX - eBundle Implementation WS-	40021045 - eMEDIX - Add-On Setup WS
30025353 - eMEDIX - 500 Claims/Remits PROMO RT	40021021 - eMEDIX - Claims Implementation RT and 40021022 - eMEDIX - ERA Only Implementation RT	40021030 - eMEDIX - Add-On Setup RT

30025354 - eMEDIX - 500 Claims/Remits PROMO WS	40021037 - eMEDIX - Claims Implementation WS and 40021038 - eMEDIX - ERA Only Implementation WS	40021040 - eMEDIX - Claim\E Provider Setup
30025355 - eMEDIX - 500 Claims/Remits WS	40021037 - eMEDIX - Claims Implementation WS and 40021038 - eMEDIX - ERA Only Implementation WS	40021040 - eMEDIX - Claim\E Provider Setup
30025356 - eMEDIX - 200 Claim/Remit/ Eligibility WS	40021036 - eMEDIX - eBundle Implementation WS	40021040 - eMEDIX - Claim\E Provider Setup and 40021041 Eligibility Addt'l Prov. Setup
30025357 - eMEDIX - 500 Claims WS	40021037 - eMEDIX - Claims Implementation WS	40021040 - eMEDIX - Claim\E Provider Setup
30025358 - eMEDIX - 1,000 Claims WS	40021037 - eMEDIX - Claims Implementation WS	40021040 - eMEDIX - Claim\E Provider Setup
30025359 - eMEDIX - 500 ERA's WS	40021038 - eMEDIX - ERA Only Implementation WS	40021043 - eMEDIX - ERA Ad Provider Setup WS
30025360 - eMEDIX - 200 ERAs WS	40021038 - eMEDIX - ERA Only Implementation WS	40021043 - eMEDIX - ERA Ad Provider Setup WS
30025361 - eMEDIX - 1,000 ERAs WS	40021038 - eMEDIX - ERA Only Implementation WS	40021043 - eMEDIX - ERA Ad Provider Setup WS
30025362 - eMEDIX - 500 Real Time Eligibility WS	40021039 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibilit Prov. Setup
30025363 - eMEDIX - 1000 Real Time Eligibility WS	40021039 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibilit Prov. Setup
30025364 - eMEDIX - eClaims per Transaction WS	40021037 - eMEDIX - Claims Implementation WS	40021045 - eMEDIX - Add-On Setup WS

30025365 - eMEDIX - Electronic to paper claims WS		
30025366 - eMEDIX - ERAs per Transaction WS	40021038 - eMEDIX - ERA Only Implementation WS	40021043 - eMEDIX - ERA Ad Provider Setup WS
30025367 - eMEDIX - Eligibility per Transaction WS	40021039 - eMEDIX - Eligibility Only Implementation	40021041 - eMEDIX - Eligibili Prov. Setup
30025368 - eMEDIX - Claim Status Inquiry WS		
30025369 - eMEDIX - Revenue Resolve Denial WS	40021042 - eMEDIX - Revenue Resolve Setup WS	40021042 - eMEDIX - Revenu Setup WS
30025370 - eMEDIX - PRE-Confirm per Transaction WS		
30025371 - eMEDIX - PRE-Confirm per Provider WS		
30025372 - eMEDIX - Electronic Claim Attachment WS		
30025373 - eMEDIX - Print/Mail Claim Attachment WS		
30025374 - eMEDIX - 200 Claims WS	40021037 - eMEDIX - Claims Implementation WS	40021045 - eMEDIX - Add-On Setup WS
30025375 - eMEDIX - 200 Real Time	40021039 - eMEDIX - Eligibility Only	40021041 - eMEDIX - Eligibili

Eligibility WS	Implementation	Prov. Setup
30025376- eMEDIX - Claim Scrub per Claim WS		
30025377 - eMEDIX - 1,175 Claim Scrubs WS		
30025378 - eMEDIX - 750 Claim Scrubs WS		
30025379 - eMEDIX - Claims Attachments WS		
30025380 - eMEDIX - Paper EOB-to-ERA per Claim WS		
30025381 - eMEDIX - DDE Direct Medicare Access WS		
30025467 - eMEDIX - Statements per Transaction WS		