



CompassConnect

Member Guide

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What is CompassConnect?

CompassConnect allows you to find medical providers in your area who accept your healthcare benefits plan and specialize in a particular type of care. The information available for each provider includes the provider's location, contact information, and quality rating based on how other patients have rated this provider.

Once you have found a provider, you can request assistance to ensure that the provider will accept your healthcare benefits plan, if necessary, get help resolving a balance bill, and determine how much a particular procedure will cost you.

CompassConnect is available from either a desktop or mobile device.

Getting Started

To start using CompassConnect, you will need to set up an account using the following information found on your member ID card:

- ID Number
- First Name
- Group Number
- Date of Birth
- Zip Code

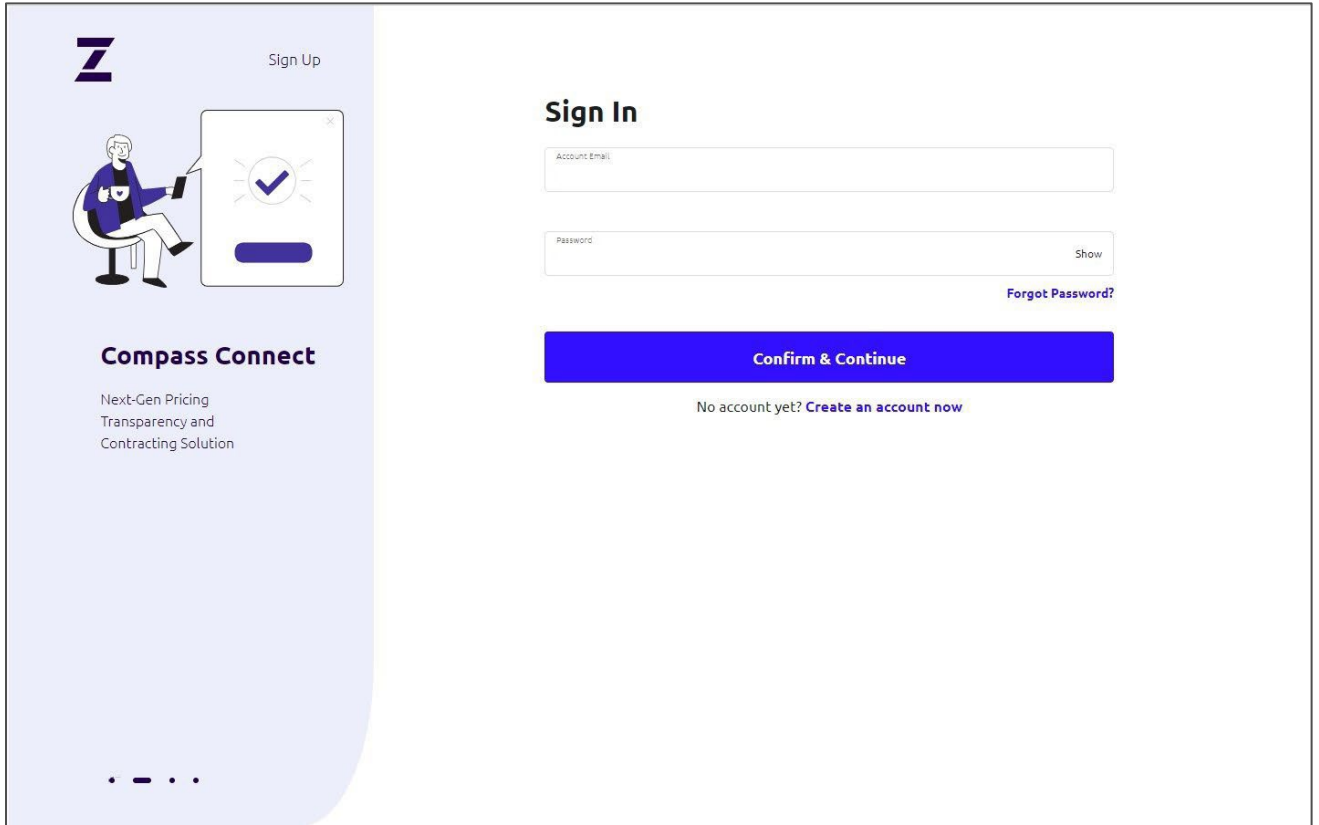
Each family member should set up an account within CompassConnect to ensure confidentiality of information.

To set up your CompassConnect account

1. Have your member ID card available.
2. Access the CompassConnect website using the URL provided by your health plan administrator.



Sign In screen (desktop)



3. Click on **Create an account now** to begin the registration process, which consists of providing some basic information about yourself, setting up your user ID and password, and then confirming this information.

Personal Information screen (desktop)

4. Enter your personal information as found on your member ID card.
5. Click **Continue**.

Note: If your personal information is not found in our system, you will receive a message to confirm the information you have entered and try again. If you are unsuccessful, please call your health plan administrator.

Account information screen (desktop)

6. On the **Account information** screen, enter your phone number, your email address, and a password.

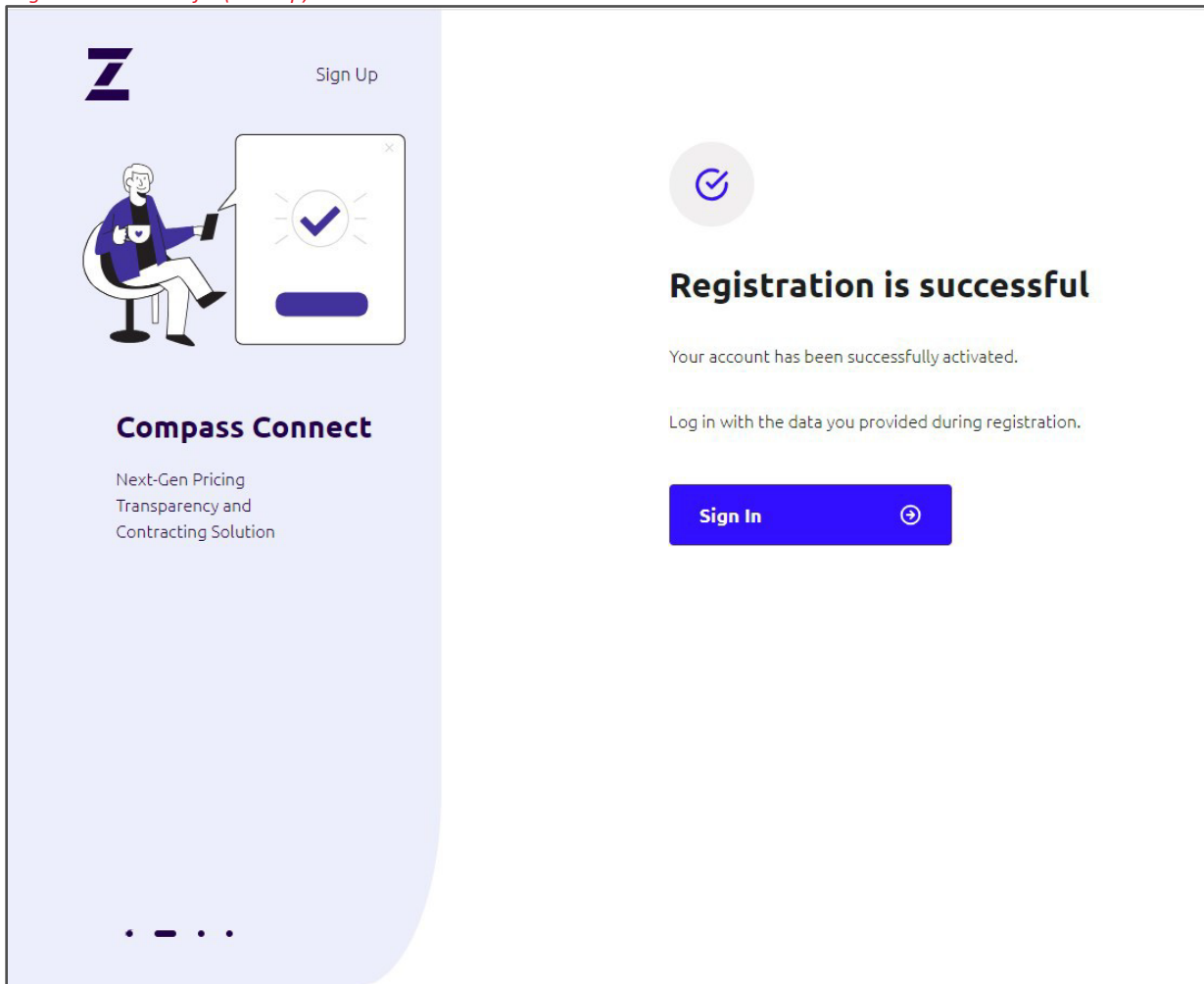
Note: The email address and password you enter during the registration process will be your CompassConnect login credentials. All notifications from CompassConnect will be sent to this email address.

7. Click **Continue**. You will receive an email asking you to confirm your account.

Email to confirm account

8. Click the link in the email to activate your account. You will receive a message that your account has been activated.

Registration Successful (desktop)



You are now ready to use CompassConnect.

To access your CompassConnect account

1. Use the URL provided by your health plan administrator to access the CompassConnect website.
2. Sign in to your account using the email address and password you provided during the registration process. The **Welcome** page's **Dashboard** will appear.

Note: The first time you sign in to your CompassConnect account, you will be asked to agree to the Terms of Use. You must click **I Agree** at the bottom of this screen to use the application.

Service Disclaimer (desktop)

The screenshot shows a desktop registration interface. On the left, there is a vertical sidebar with the Zelis logo at the top, a 'Sign Up' button, and a 'Registration process' section. The first step in the process is highlighted with a blue circle containing the number '1' and the text 'Compass Connect Terms of Use'. The main content area is titled 'Please approve' and contains the following text:

Please approve

You can't use this application before approve

Terms of Use

Payer Compass (Payer Compass, "us" or "we") offers CompassConnect ("CompassConnect"), a secure online resource and mobile application that helps health plan members get important information about their health care benefit plans.

CompassConnect provides online and mobile access to health information, and depending on the terms of your health plan, the ability to:

- View and submit electronic documents;
- Submit preferences for Payer Compass communications with you;
- Search for providers to see how they are participating in your plan;
- Shop and compare prices for medical services; and
- Chat online with a representative regarding advocacy services and balance bill support.

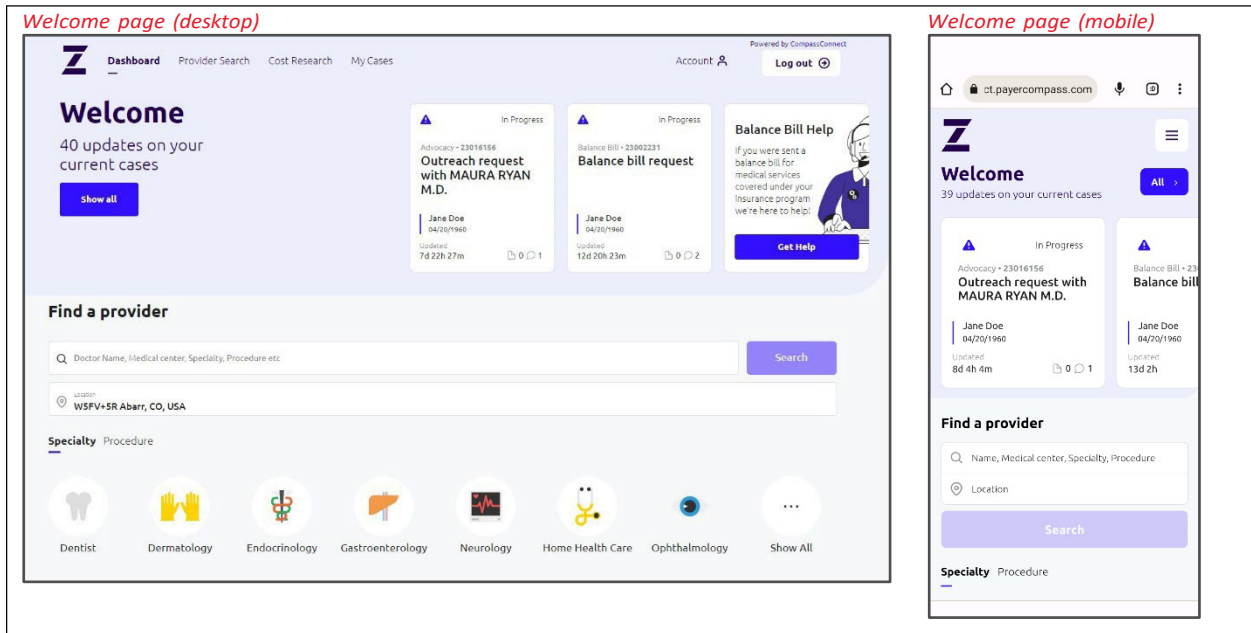
CompassConnect is intended for use by individuals 18 years of age or older. CompassConnect may not be used by anyone under 18.

Your Responsibilities

You agree to:

- Act responsibly and be truthful and accurate about yourself and your dependents;
- Protect your unique identifier and/or password from any unauthorized use;
- Notify your health plan immediately if you discover any changes and modifications to your account that you did not authorize;
- Notify your health plan immediately if you suspect or discover any use, access, or account-related security breach;
- Use CompassConnect for personal or non-commercial purposes only; if you print pages from this website, you may only use them for your own personal use; and
- Notify your health plan of any change in your personal information

From the **Welcome** page's **Dashboard**, you can search for a provider (See Searching for Providers on page 12).

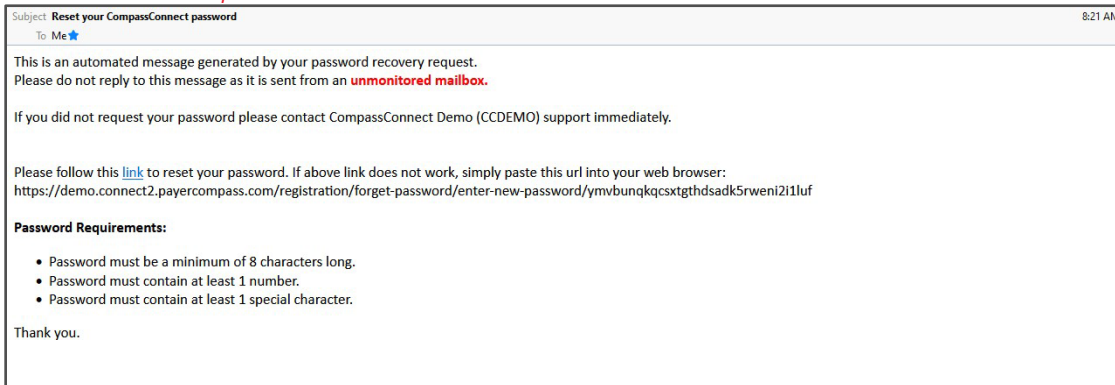


To reset your CompassConnect password

You can reset your CompassConnect password by clicking **Forgot Password** on the **Sign In** screen.

1. On the **Sign In** screen, click **Forgot Password**. The **Please enter your email** screen appears.
2. Enter the email address associated with your account.
3. Click **Send Email**. You will receive an email with a link to reset your password.

Email with link to reset password

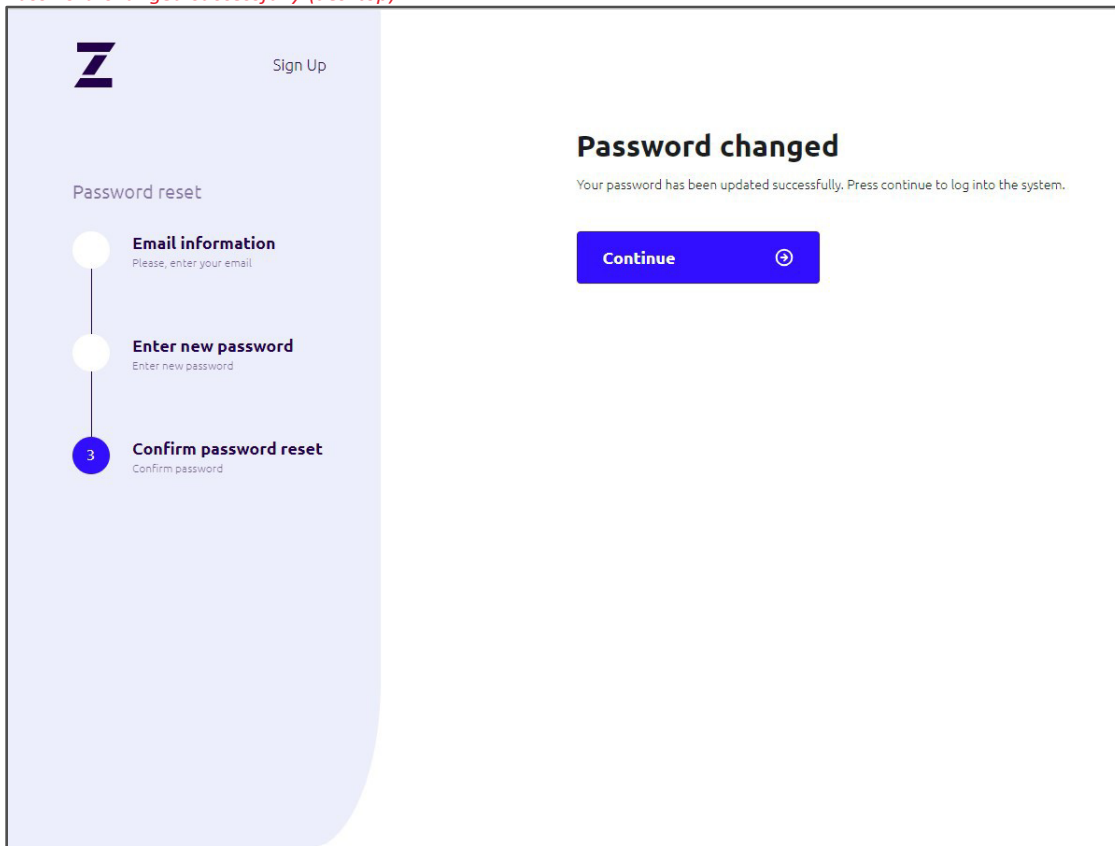


4. Click on the link inside the email. The **Please enter your new password** screen appears.

Enter new password (desktop)

5. Enter your new password ensuring that it follows the minimum requirements provided.
6. Confirm your new password by entering it again.
7. Click **Set New Password**. You will receive confirmation that your password has been changed.

Password changed successfully (desktop)



8. Click **Continue** to log in using your new password.

Managing Your Account

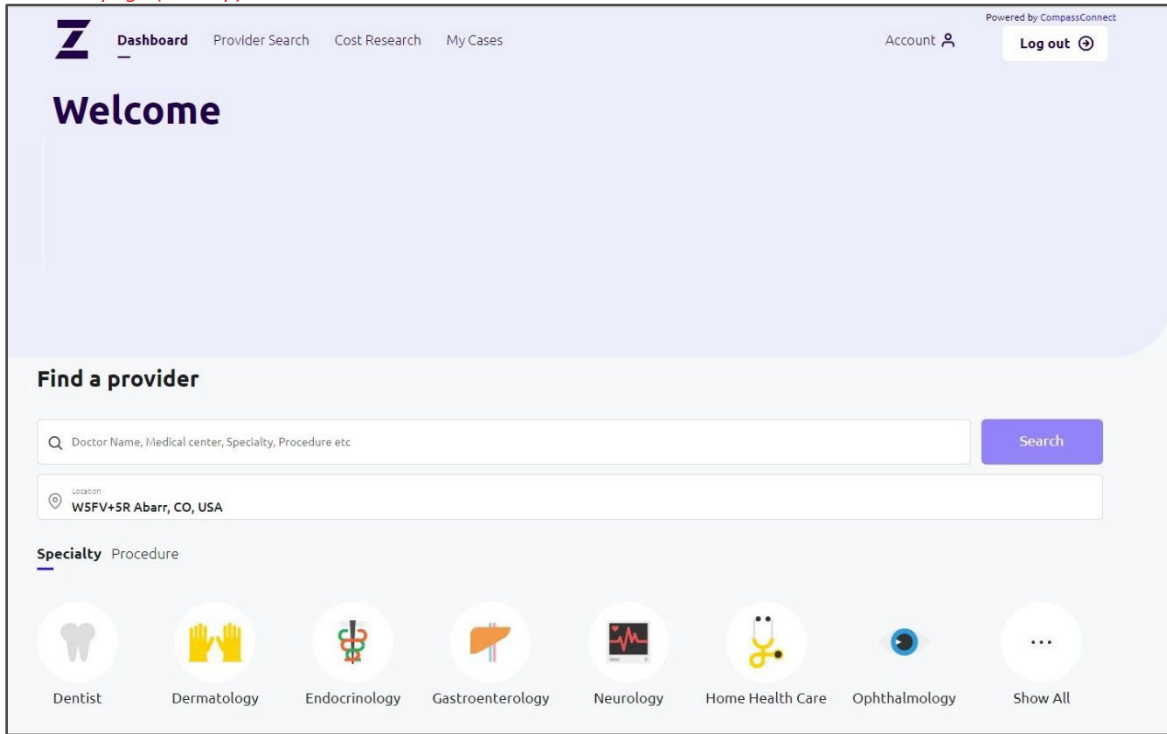
Initially, your account profile consists of the email address you entered during the registration process. If desired, you can add a phone number to your profile and manage whether you receive account notifications via email, text, or both. By default, you will receive account notifications via email for all cases you initiate.

Through your account profile, you can also change your account password.

To update your phone number or email address

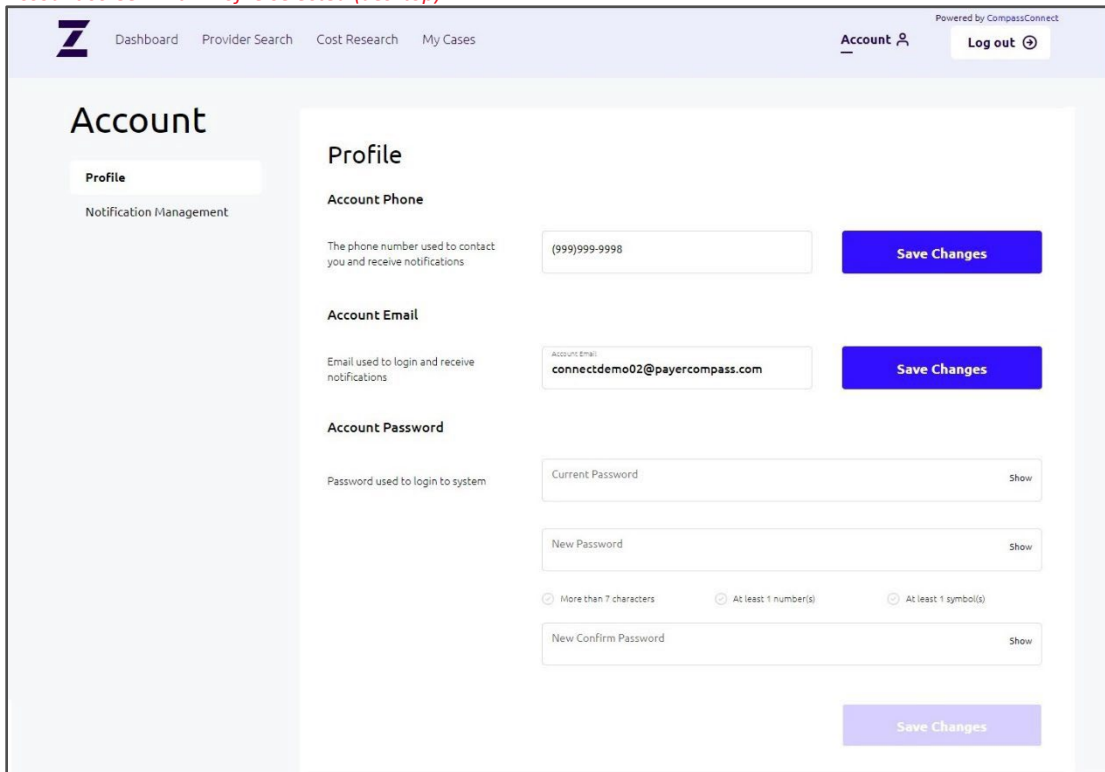
1. On the **Welcome** page, click **Account**.

Welcome page (desktop)



2. On the **Profile** screen, update your phone number or email address. The **Save Changes** button will be activated next to the information that you update.

Account screen with Profile selected (desktop)



3. Click **Save Changes**. The **Confirm your account** screen will open so that you can enter the confirmation code that was sent to your phone or your email address, depending on the contact information being changed.

Confirmation code (desktop)

4. Enter the confirmation code and click **Validate**. Then, log out for the changes to take effect.

To update how you receive notifications

1. On the **Account** screen, click **Notification Management**.

Account screen with Notification Management selected (desktop)

2. By default, you will receive notifications via both email and text (if you have a phone number associated with your account). Click to set either **On** or **Off**, depending on your preference.
3. Click **Save Changes**.

To reset your CompassConnect password

You can reset your CompassConnect password through your account profile.

1. On the **Profile** screen, enter your current password.

Resetting account password (desktop)

The screenshot shows the 'Account Profile' page in the CompassConnect system. The page has a navigation bar at the top with 'Dashboard', 'Provider Search', 'Cost Research', and 'My Cases'. On the right, it says 'Account' and 'Log out'. The main content area is titled 'Account' and has a sidebar with 'Profile' and 'Notification Management'. The 'Profile' section is active and contains three main sections: 'Account Phone', 'Account Email', and 'Account Password'. Each section has a text input field and a 'Save Changes' button. The 'Account Password' section includes a 'Current Password' field, a 'New Password' field, and a 'New Confirm Password' field. Below the 'New Password' field, there are three radio button options for password requirements: 'More than 7 characters', 'At least 1 number(s)', and 'At least 1 symbol(s)'. A 'Show' button is next to each password field. A 'Save Changes' button is at the bottom right of the profile section.

2. Enter your new password ensuring that it follows the minimum requirements provided.
3. Confirm your new password.
4. Click **Save Changes**.

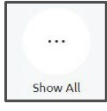
Searching for Providers

A search for providers will give you the following information:

- whether the provider accepts your healthcare benefits plan
- whether the provider specializes in a particular type of care
- the provider's location and contact information
- the provider's quality rating based on how other patients have rated this provider

You can search for a provider by name, by specialty, or by procedure.

Searching by specialty: When searching for a provider by specialty, you can enter the name of the specialty, you can select one of the specialty icons, or you can select the **Show All** icon



() to see an alphabetical listing of all specialties and select from this list.

All specialties listed (desktop)

Dentist

Dermatology

Endocrinology

Gastroenterology

Neurology

Home Health Care

Ophthalmology

Hide All

All specialties

<p>A Acupuncture Allergy/Immunology Ambulatory Health Care Facilities Ambulatory Surgical Center Anesthesiology Audiology</p> <p>B Behavioral Health Facility Behavioral Health Physicians</p> <p>C Cardiology Chiropractic Clinical Geneticist</p> <p>D Dentist Dermatology Dialysis Durable Medical Equipment</p> <p>E Endocrinology Eye Doctors</p> <p>F Family Medicine</p> <p>G Gastroenterology General Practice</p>	<p>H Hematology Hepatology Home Health Care Hospice Hospital</p> <p>I Infectious Disease Infusion Therapy Internal Medicine</p> <p>L Lab</p> <p>M Managed Care Organizations</p> <p>N Neonatology Nephrology Neurology Nutritionist</p> <p>O Obstetrics/Gynecology Occupational Therapy Oncology Ophthalmology Oral/Maxillofacial Surgery Orthopaedics Otolaryngology</p>	<p>P Pain Management Pathology Pediatrics Pharmacy Psychiatry/Physical Medicine Physical Therapy Physicians Podiatry Prosthetics & Orthotics Pulmonology</p> <p>R Radiology/Imaging Rehabilitation Hospital Rheumatology</p> <p>S Skilled Nursing Facility Speech Therapy Surgeons</p> <p>T Technologists, Technicians & Other Technical Service Providers Transportation</p> <p>U Urgent Care Urology</p> <p>V Vascular</p> <p>W Wound Treatment Center</p>
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Searching by procedure: When searching for a provider by procedure, you can enter the name of the procedure, or you can click **Procedure** to see an alphabetical listing of procedures and select from this list.

To search for a provider

1. Begin typing the name of the provider, the specialty, or the procedure. When the name, specialty, or procedure appears in the list below the search field, select it.

Finding a provider (desktop)

Dashboard Provider Search Cost Research My Cases Account **Log out**

Welcome

Find a provider

Q Doctor Name, Medical center, Specialty, Procedure etc **Search**

Location
Abarr, CO, USA

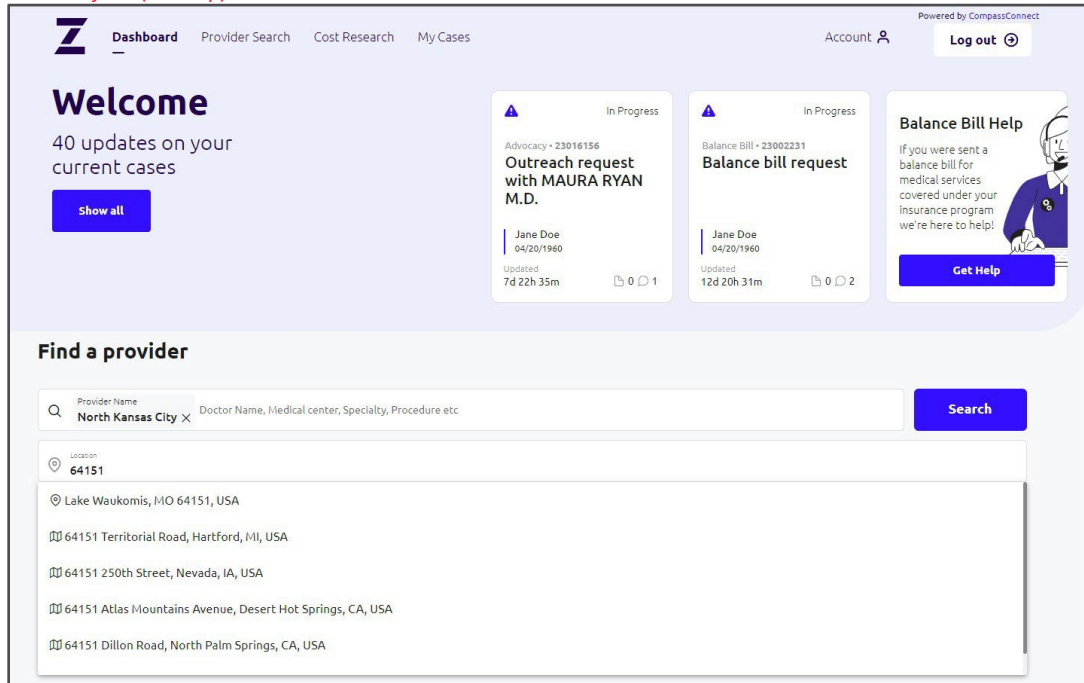
Specialty Procedure

Dentist Dermatology Endocrinology Gastroenterology Neurology Home Health Care Ophthalmology Show All

2. The **Location** field defaults to your actual current location if you have allowed your browser to access this information. If not, location is based on your account information.

To search in a different location, enter location information such as a street address, the name of a city, or a ZIP code. A list of locations meeting the criterion will appear. Select the location to use for the search.

Location field (desktop)



3. Click **Search**. The top 25 providers that match your search criteria will be displayed on the **Provider Search** page. By default, these providers are listed in order by acceptance status, distance from your location, quality rating, and name. However, your plan may have implemented a different order for search results.

Note: If your plan does not offer Advocacy services, the My Cases option will be grayed out and you will not see the Balance Bill Help tile, any “cases” tiles, and the Request Outreach button on the provider search results.

Search results (desktop)

The desktop search results page shows a search for 'North Kansas City' in Lake Waukomis, MO 64151, USA. It lists three providers:

- MERITAS HEALTH NORTH KANSAS CITY**: Internal Medicine • MERITAS HEALTH NORTH KANSAS CITY. 2700 CLAY EDWARDS DR SUITE 400, NORTH KANSAS CITY, MO 64116. Phone: (816) 421-4240. Status: Potential program acceptance, Not Rated. Distance: 6.5 ml. Button: Request Outreach.
- NORTH KANSAS CITY HOSPITAL**: Hospital • NORTH KANSAS CITY HOSPITAL. 2800 CLAY EDWARDS DR., NORTH KANSAS CITY, MO 64116. Phone: (816) 691-2000. Status: Potential program acceptance, 4.5 stars. Distance: 6.6 ml. Button: Request Outreach.
- PRIMARY CARE NORTH KANSAS CITY LLC**: Family Medicine • PRIMARY CARE NORTH KANSAS CITY LLC. 5861 NW 72ND ST., KANSAS CITY, MO 64151. Phone: (816) 741-2286. Status: Not enough information, Not Rated. Distance: 0.8 ml. Button: Request Outreach.

A map on the right shows the location in Kansas City, MO. A disclaimer at the bottom states: "The presence of a healthcare professional/provider on this site does not imply any recommendation, endorsement, qualification to practice, credentialing, or guarantee of competence of any such healthcare professional/provider. The reader is encouraged to carefully evaluate any healthcare professional/provider referenced herein."

Search results (mobile)

The mobile search results page shows a search for 'Eggers' at 4700 NW 82nd Terrace, Kansas City, MO. It lists two providers:

- JOHN EGGERS MD, PHD**: Orthopaedics • JOHN EGGERS MD, PHD. 2790 CLAY EDWARDS DR # DR600, KANSAS CITY, MO 64116. Phone: (816) 561-3003. Status: Potential program acceptance, 5/5 stars. Distance: 7.9 ml. Button: Request Outreach.
- SUZANNE EGGERS M.D.**: Obstetrics/Gynecology • SUZANNE EGGERS M.D. 2529 GLENN HIENDREN DR SUITE 200, LIBERTY, MO 64068. Phone: (816) 781-7820. Status: Potential program acceptance, 5/5 stars. Distance: 11.4 ml. Button: Request Outreach.

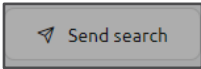
A 'Get Help' button is visible at the top of the results section.

Understanding your search results


Search results display the following information about the providers that meet your search criteria:

- Name
- Distance from the location entered, which can be a ZIP code, street address, or city/state
- Address
- Phone Number
- The provider's likelihood of accepting your health plan/program
- Quality rating (if enough data exists)

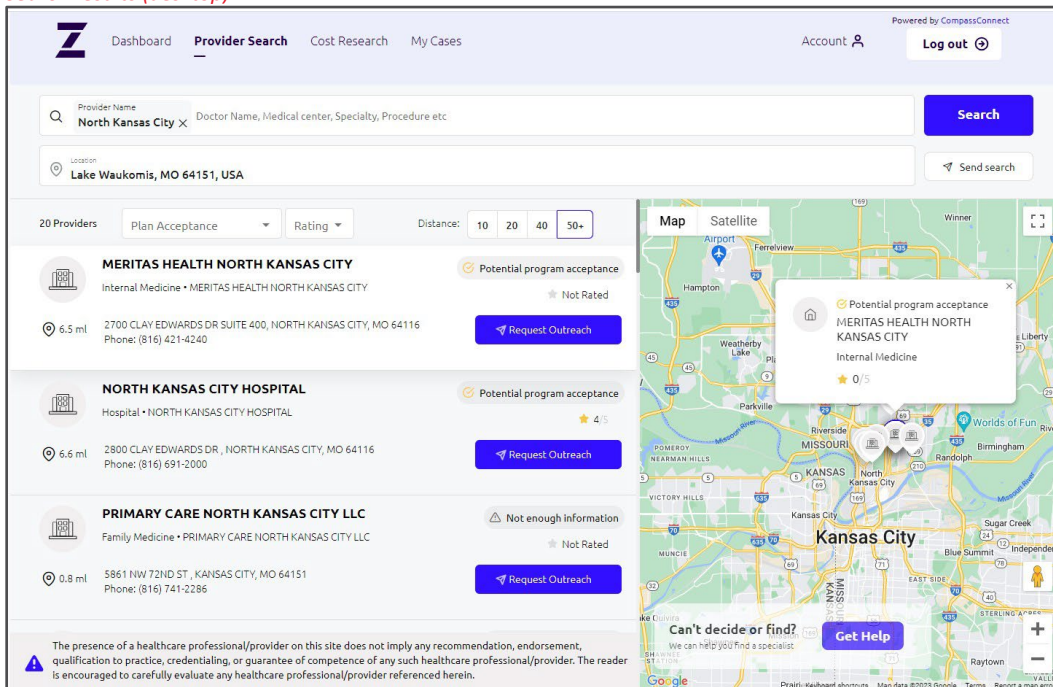
Emailing your search results

You can get an email that contains your search results by clicking . This email will be either from support_public@payercompass.com or your health plan. The subject of this email will be "Your CompassConnect provider results." If you cannot find the email in your Inbox, check your Spam or Junk folder.


Viewing Provider Information


You can click on a provider icon  on the map to view the provider's name, plan/program acceptance, and quality rating. Clicking on this icon will highlight the provider in the search results list.


Search results (desktop)




A provider’s likelihood of accepting your health plan is indicated across from the provider’s name in the following way (The actual wording may vary):

-  **Safe harbor provider**

Provider has agreed to accept the program’s health plan. The provider is listed as “safe harbor.”
-  **Potential program acceptance**

The provider has accepted the program’s health plans in the past.
-  **Not accepting**

This provider has refused to accept the program’s health plans in the past or has sent a plan member a balance bill.
-  **Not enough information**

Not enough information exists to determine whether this provider is willing to accept the program’s health plan.

If your health plan provides advocacy services, you can request help finding a provider or determining whether a provider will accept your health plan by clicking the **Get Help** button on the map of the provider search results. See Requesting help finding a provider on page 21.

You can click anywhere in the provider’s contact information to learn more about the provider such as hospital affiliations and education.

Sample Contact Information for Provider (desktop)

Refining your search results

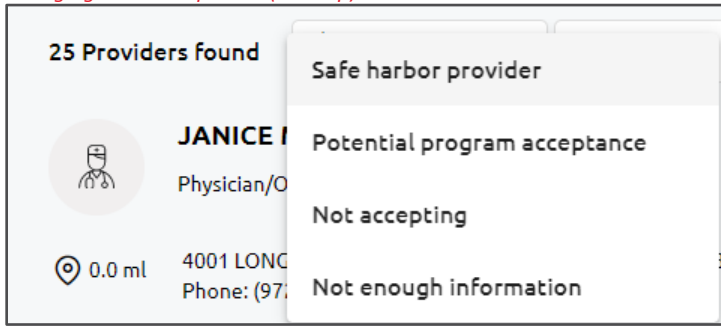
The initial search results returned use the following base criteria in addition to the specific criteria you specified:

- All plan acceptance levels
- All quality ratings (1 to 5)
- 50+ miles from the specified location

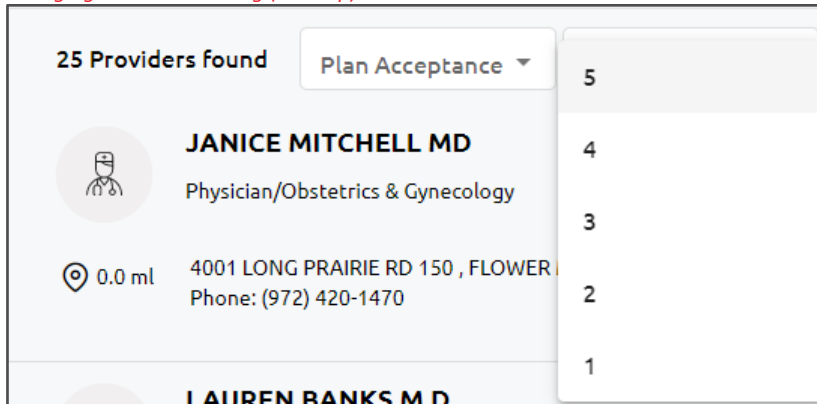
You can change one or more of the base criteria to refine your search results.

On a desktop device, changing the **Plan Acceptance** or the **Rating** will refresh the search results automatically. If you change the **Distance**, you will need to click the **Search** button to refresh the results.

Changing Plan Acceptance (desktop)



Changing Provider's Rating (desktop)

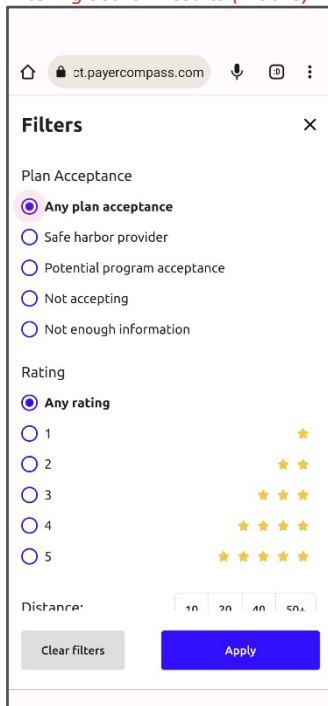


Changing Distance Searched (desktop)



On a mobile device, click the **Filter** icon , select how you want to filter the results, and click **Apply**.

Filtering Search Results (mobile)



Clearing your search results

To begin a new search, click the **X** next to the current search criteria, enter your new criteria, and select the **Search** button.

Requesting help finding a provider

If your Health Plan Administrator uses Zelis’s advocacy services, you can request help finding a provider or determining whether a provider will accept the health plan.

1. Click the  button on the map of the provider search results.

Get Help

20 Providers Plan Acceptance Rating

Distance: 10 20 40 50+

MERITAS HEALTH NORTH KANSAS CITY

Internal Medicine • MERITAS HEALTH NORTH KANSAS CITY

6.5 ml 2700 CLAY EDWARDS DR SUITE 400, NORTH KANSAS CITY, MO 64116
Phone: (816) 421-4240

Potential program acceptance

★ Not Rated

Request Outreach

NORTH KANSAS CITY HOSPITAL

Hospital • NORTH KANSAS CITY HOSPITAL

6.6 ml 2800 CLAY EDWARDS DR, NORTH KANSAS CITY, MO 64116
Phone: (816) 691-2000

Potential program acceptance

★ 4.5

Request Outreach

PRIMARY CARE NORTH KANSAS CITY LLC

Family Medicine • PRIMARY CARE NORTH KANSAS CITY LLC

0.8 ml 5861 NW 72ND ST, KANSAS CITY, MO 64151
Phone: (816) 741-2286

⚠ Not enough information

★ Not Rated

Request Outreach

⚠ The presence of a healthcare professional/provider on this site does not imply any recommendation, endorsement, qualification to practice, credentialing, or guarantee of competence of any such healthcare professional/provider. The reader is encouraged to carefully evaluate any healthcare professional/provider referenced herein.

Select Request type

Z

[Dashboard](#) [Provider Search](#) [Cost Research](#) [My Cases](#)

Account Log out

← Advocacy request

1 Request type
The types of requests you need help with

2 General Information
Basic information about the request

3 Patient Information
Who needs help with a case

4 Summary

Select Request type

Find me a provider

Our specialists will help you find the best doctor for your needs

→

Confirm plan acceptance

Our specialists will confirm that the provider you're interested in is willing to accept your plan

→

2. Select the type of request and then complete the requested information.
3. Click **Continue** to add the patient's information.
4. Click **Continue** to review the information being submitted.
5. If all the information is correct, click **Submit**. Otherwise, click the **Back** button to correct the information.

After you click **Submit**, you will get a message that the request was sent successfully. You will be able to monitor the status of a request (case) from your **Welcome** page's **Dashboard**.

Requesting Provider Outreach

If you have questions about any provider, you can submit a request for outreach to that provider via our Patient Advocates. This request will generate a case for our Patient Advocates to perform that outreach. However, feel free to go ahead and schedule your appointment while a Patient Advocate works your case.

Note: If your health plan administrator does not want you to create cases through CompassConnect, you will not see the option to request outreach.

Patient Advocates are available to answer any questions you have about your health plan. They are also able to help educate your doctor or hospital about your health plan, ensuring the provider understands how your plan will reimburse, or pay, for services. The goal is to gain a provider's acceptance of your plan rate as payment in full.

To request outreach

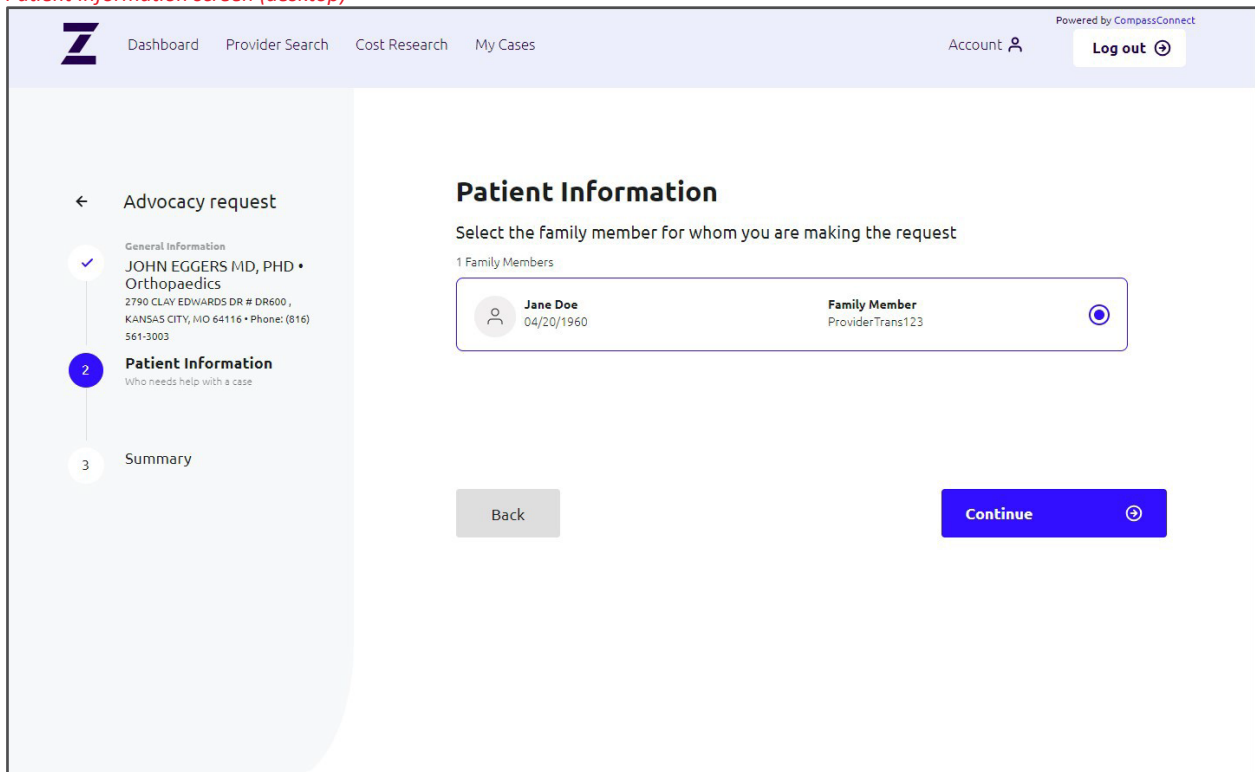
1. From the search results or the provider information screen, click **Request Outreach**.
2. On the **Request for outreach** screen, indicate whether you or the family member is a new or current patient.
3. If you already have an appointment scheduled, indicate the date of the appointment in mm/dd/yyyy format.

Request for outreach screen (desktop)

The screenshot shows the 'Request for outreach' interface on a desktop. At the top, there is a navigation bar with 'Dashboard', 'Provider Search', 'Cost Research', and 'My Cases'. On the right, it says 'Account' and 'Log out'. The main content area is titled 'Request for outreach'. On the left, there is a sidebar with 'Advocacy request' selected, and three steps: '1 General Information', '2 Patient Information', and '3 Summary'. The main content area shows a 'Potential program acceptance' status of 'Not Rated'. Below that, there is a card for 'MERITAS HEALTH NORTH KANSAS CITY' with contact information. There are two radio buttons for 'Patient type': 'New Patient' and 'Current Patient'. Below that, there is a question 'Do you have an appointment scheduled?' with an 'Appointment Date' field. At the bottom, there are 'Back' and 'Continue' buttons.


4. Click **Continue**.

Patient Information screen (desktop)



5. On the **Patient Information** screen, enter one or more of the following criteria to narrow your search if you have multiple family members in your plan:

- The name of the family member for whom you are requesting an appointment. This can be the first name, last name, or both.
- The birth date of the family member.

6. Click  to search for a list of family members meeting the search criteria.
7. Click **Select** for the family member for whom you are requesting an appointment. The **Confirmation of request** screen appears.

Confirmation of request screen (desktop)

Powered by CompassConnect

Dashboard Provider Search Cost Research My Cases Account **Log out**

← Advocacy request

General Information
 MERITAS HEALTH NORTH KANSAS CITY • Internal Medicine
 2700 CLAY EDWARDS DR SUITE 400, NORTH KANSAS CITY, MO 64116 • Phone: (816) 421-4240

Patient Information
 Jane Doe
 Family Member • ProviderTrans123

3 Summary

Confirmation of request

Request type
 Confirm Plan Acceptance

Provider Information
 MERITAS HEALTH NORTH KANSAS CITY MERITAS HEALTH
 NORTH KANSAS CITY
 Internal Medicine
 1467432294

Provider Address & Contact
 2700 CLAY EDWARDS DR SUITE 400, NORTH KANSAS CITY, MO 64116
Phone: (816) 421-4240
 Email:

Patient Information
 Jane Doe
 04/20/1960
 Email:
 Phone:
 Plan: CCDEMO
 ID number: ProviderTrans123

General Information
 Patient type: New Patient
 Appointment scheduled: No

Back **Submit**

8. Review the information and click **Submit**. You will receive confirmation that the request was sent successfully.

By default, you will receive updates via email as your case is worked. You can change how you receive updates using the **Account** option (see To update how you receive notifications on page 11). You can also view all outreach requests using the **My Cases** option on the **Welcome** page.

Requesting Help with a Balance Bill

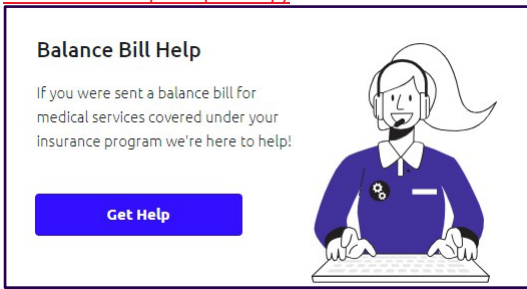
If you receive a balance bill from a provider, you can request help to resolve it. As part of this request, you will need to upload both the balance bill statement and the corresponding EOB (Explanation of Benefits).

Note: A balance bill is a bill that a provider sends to a member in an attempt to collect from a plan member the difference between what the provider billed and what the plan paid minus any copay or deductible.

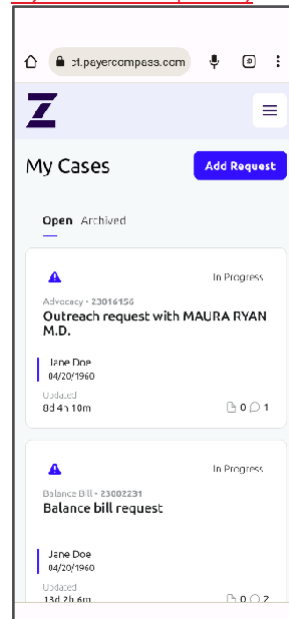
You can submit a request by clicking the **Get Help** button on the **Balance Bill Help** tile or by clicking the **Create a case** button (desktop) or **Add Request** button (mobile) on the **My Cases** screen. (See page 29.)

The first time you submit a request for help with a balance bill, you will be asked to agree to Terms and Conditions. Your acceptance creates an electronic version of a HIPAA release form so that Payer Compass can access your health information.

Balance Bill Help tile (desktop)



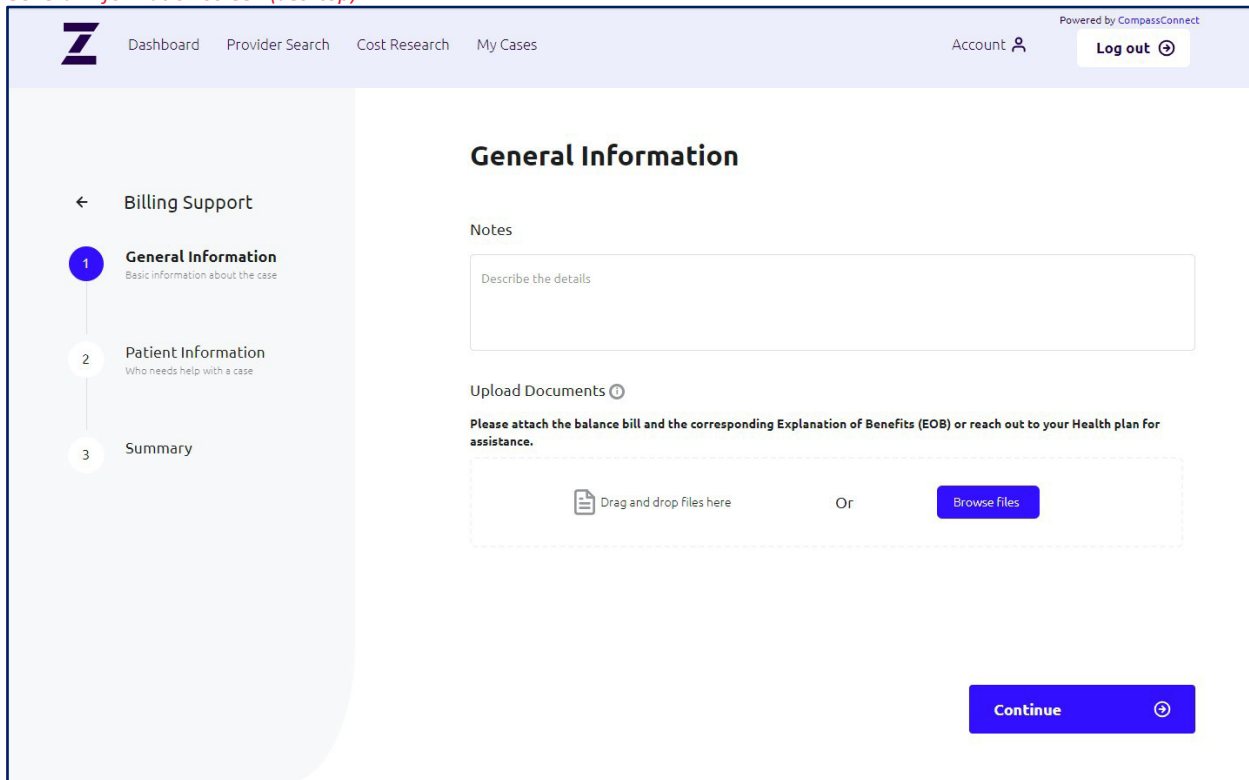
My Cases screen (mobile)



To open a case for a balance bill from the Balance Bill Help tile

1. From the **Balance Bill Help** tile on the **Welcome** page, click **Get Help**.

General Information screen (desktop)

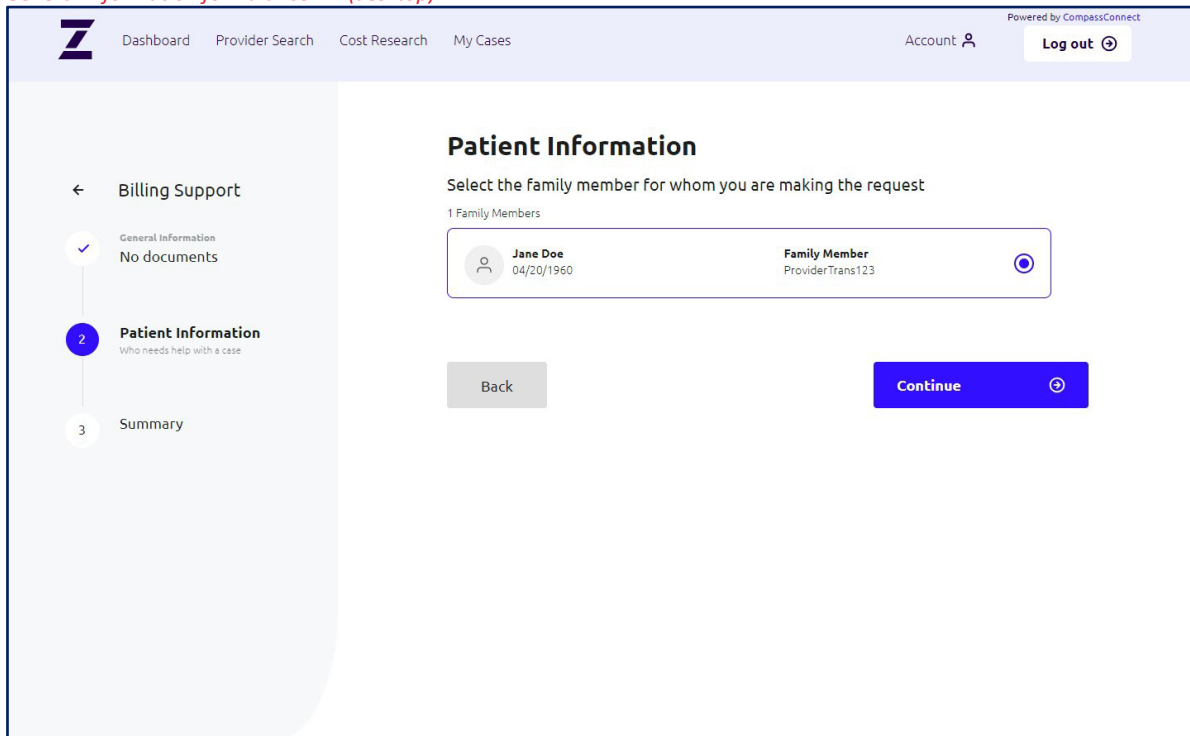



2. Enter any notes about the balance bill and upload the balance bill statement and corresponding EOB.

Note: A description in the Notes field is required.

3. Click **Continue**.

General Information for Balance Bill (desktop)



4. If there are multiple family members on your plan, enter the name of the patient and a birth date (optional). Then, click  to display those on your health plan meeting the search criteria.
5. Select the person for whom you are opening the Balance Bill case.
6. Review the information. If correct, click **Submit**. Otherwise, click the **Back** button.

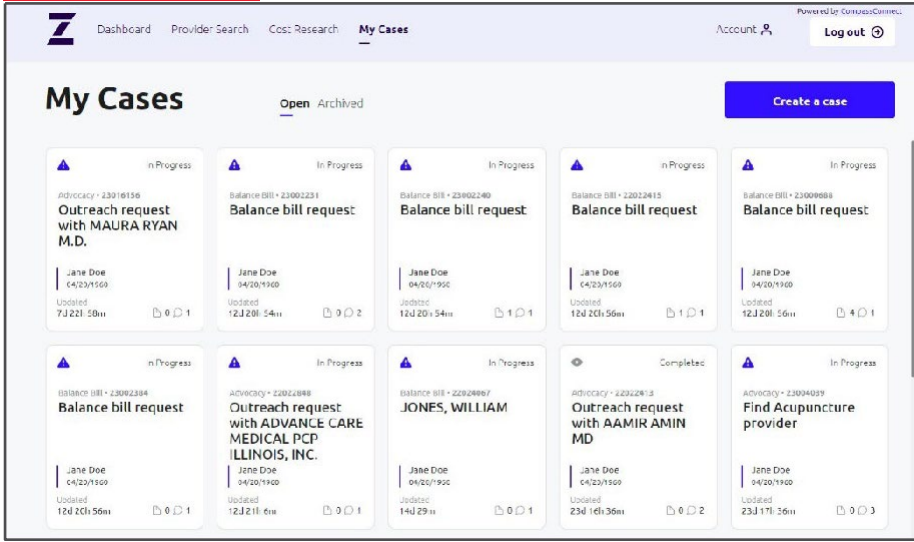
After you click **Submit**, you will get a message that the request was sent successfully. The case will appear on your **Welcome** page's **Dashboard**.

By default, you will receive updates via email as your case is worked. You can change how you receive updates using the **Account** option (see To update how you receive notifications on page 11). You can also view all outreach requests using the **My Cases** option on the **Welcome** page.

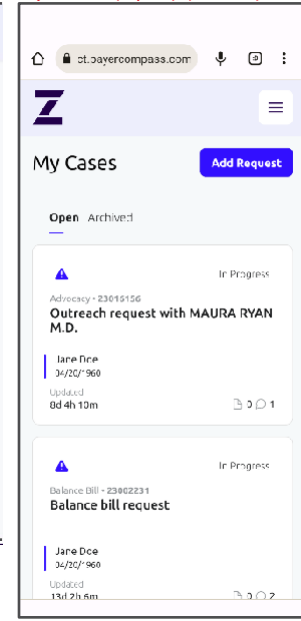
Viewing and Adding Requests

You can view your open and archived cases for both provider outreach and balance bill resolution from the **My Cases** option on the **Welcome** page. The default view is all open cases.

My Cases (Open) (desktop)



My Cases (Open) (mobile)

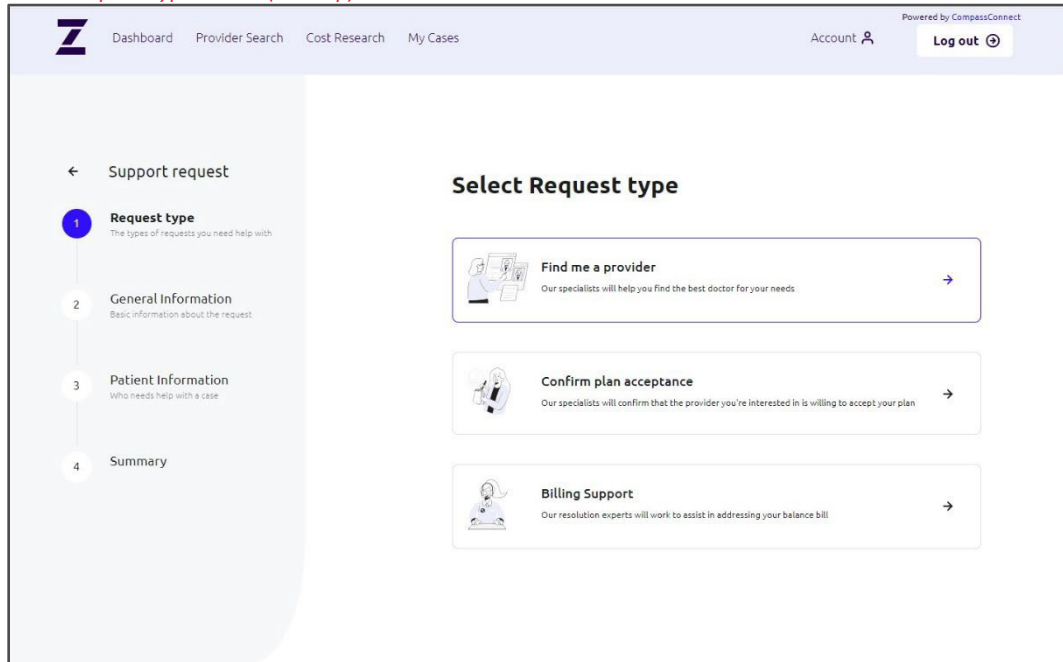


From the **My Cases** page, you can also create a new case.

To create a new request (case)

1. On the **My Cases** page, select **Create a case** (desktop) or **Add Request** (mobile). A page for selecting the type of request opens:
 - Finding a provider
 - Confirming plan acceptance
 - Getting help with a balance bill

Select Request type screen (desktop)



2. Select the type of request and then complete the requested information.

Note: The first time you select **Billing Support**, you will need to read and agree to the Terms of Service. Your acceptance creates an electronic version of a HIPAA release form so that Payer Compass can access your health information.

3. Find and select the patient for whom you are making the request.
4. Review the information being submitted. If all the information is correct, click **Submit**. Otherwise, click the **Back** button to correct the information.

After clicking **Submit**, you will get a message that the request was sent successfully. The case will appear on your **Welcome** page's **Dashboard**.

By default, you will receive updates to your cases via email. You can change how you receive updates using the **Account** option (see To update how you receive notifications on page 11).

To add information to your request (case)

You can send a message to the Patient Advocate about your request. Simply open the request and type your message in the Communication area and click the arrow.

