



# PaySpan Health Vendor User Guide

***Vendor User Guide*** is intended to assist Vendor's on accessing the PaySpan Health system. This document provides a step by step screen layout through the Vendor registration and the PaySpan interface.

**November 20, 2006**

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# Getting Started

## How to Register as a Vendor in PaySpan<sup>®</sup> Health

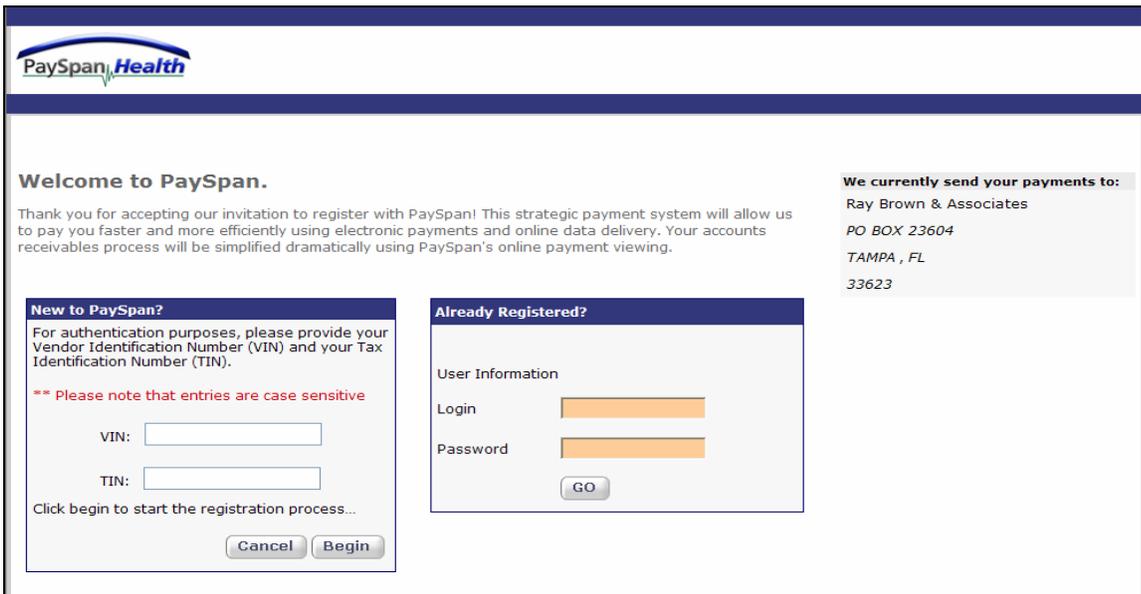
### To Register:

- Select the Orange Secure Registration button on [www.payspanhealth.com/payables](http://www.payspanhealth.com/payables) registration page
- The **Registration Code** screen will appear



- Type in the **Registration Code** From the Registration Letter
- Select the OK button

### The Welcome Page Appears:



- Type in your **Vendor Identification Number (VIN)** and **Vendor Site ID (TIN)** from your Registration letter. This information is only needed this one time.
- Select the Begin button to start the registration process

The Following **Step 1 of 3 Registration Information** screen will appear:

Registration Information

**Payer Information**

Payer Name

Payer Designation

**Individual Information**

Your Name \*

Phone

Email \*

Confirm Email \*

Select Password \*

Confirm Password \*

Challenge Question

Challenge Answer\*

\* indicates required field

Cancel Back Next

**Step 1 of 3**

**Step 1**

Please provide us with your basic contact information that will be used to create an account for you on the PaySpan system. Note that the email address that you provide will be used as your username for accessing PaySpan once your account has been created. EFT transaction notifications will be sent to the email provided.

**What You'll Need to Enroll**

- Your name, phone number and e-mail address as the designated administrator.
- Bank account information including routing and account numbers.
- Authorization to accept PaySpan's Terms of Use for your company.

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### Registration Information Step 1 of 3

- Complete the required Registration Information questions
- The Email address will become the user name when logging into PaySpan
- Select the Next button for Step 2 of 3

**STEP 2: Accounting Information Screen will appear:**

**Account Information**

Account Name \* Default Receivables

Account Description

Routing Number \*

Account Number \*

Verify Account Number \*

Account Type Business Checking

Enable Electronic Payment (EFT)

\* indicates required field

Cancel Back Next

**Step 2 of 3**

**Step 2**

PaySpan organizes your incoming payments into Receiving Accounts. The account that you enter will first be verified by our customer service representatives and will then be activated. In the next and final step in the registration process you will be asked to review and confirm all of the information that you have entered. If anything is incorrect, you will be able to edit and correct the information.

### Accounting Information Step 2 of 3

- Type in an Account Name to identify the receiving account.  
**Note:** Vendors typically use the Account Name to specify the payee designation. Each payee will have a separate registration code and can therefore have a

separate receiving account established. The same routing and account number can be used for multiple receiving accounts.

- Enter the routing number and account number in the specified fields
- Select the Next Button for step 3 of 3

### STEP 3: Terms & Conditions Screen will appear:

**PaySpan Health**

**Step 3 of 3**

**Registration Information**

**Payer Information**  
WellCare Health Plans, Inc.  
8725 Henderson Road  
Tampa, FL  
33634  
Main Phone +1 (813) 685-1678  
Payer Designation

**Individual Information**  
Name Test Data  
Phone 123-456-7889  
Email Test@pfcwc.com

**Your Bank Account Information**  
Account Name HHH  
Account Number 1234  
Routing Number 011000015  
EFT Enabled Yes

**Service Agreement**

**PaySpan® SERVICES AGREEMENT**

This Services Agreement ("Agreement") is a contract between you and Payformance Corporation and applies to your use of the PaySpan service, any related products and services and all related intellectual property and "online" or electronic documentation available through www.payspan.com (collectively the "Service"). If you do not agree to be bound by the terms and conditions of this Agreement, please do not use or access our Services. You must accept all of the terms and conditions contained in this Agreement before you may become a participant in the PaySpan network. Use of the website and the Service is a privilege, and Payformance Corporation reserves the right

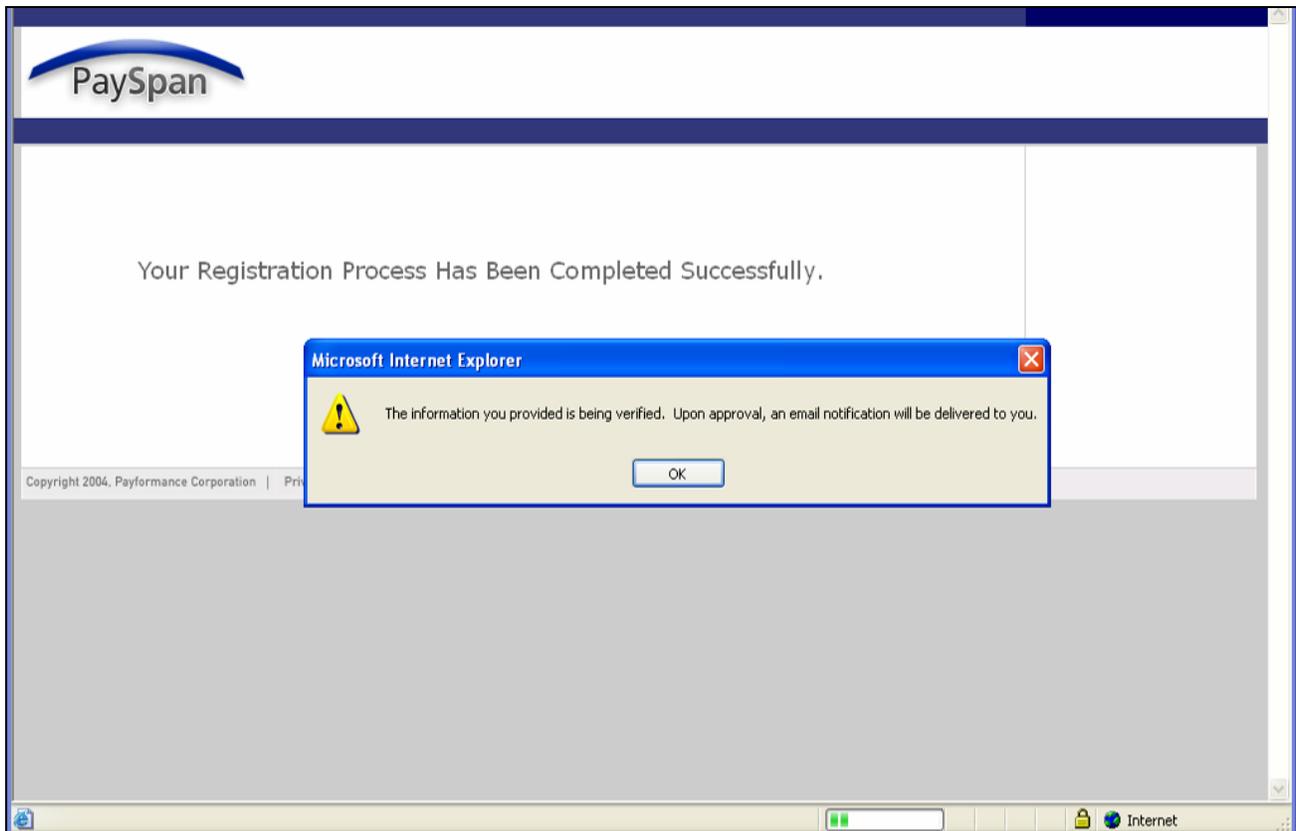
I agree to the terms and conditions

### Terms & Conditions Step 3 of 3

- Review the **Registration Information**
- Click the Edit button for any corrections
- Read the Service Agreement then check the terms and conditions box if in agreement
- Select the Submit button. This will complete the registration process

You will receive an email that your registration is complete as illustrated on the following page.

The following screen will appear:



In a few days you will need to verify with your bank that a minimal deposit has been made by Payformance. This deposit amount will be used to confirm your electronic payments are set up appropriately through PaySpan and your bank. You will see this confirmation page the next time you login to [www.payspanhealth.com/payables](http://www.payspanhealth.com/payables) using your User Id (your email address) and your password.

If you have any questions about the registration process or the website, please contact the **Support Team at 877.331.7154**

# Accessing and Using PaySpan Health

Access the PaySpan Health Welcome page by typing in [www.payspanhealth.com/payables](http://www.payspanhealth.com/payables)

The following screen will appear:

**PaySpan Health**

## Welcome to PaySpan Health

The optimal way to receive payments and remittance information

PaySpan Health makes electronic payments practical. Now you can receive electronic payments and online remittances without investing in new technology, and without changes to current systems!

Registration is free and fast.  
Open the door to a better way of receiving payments.

**Vendor Registration**  
If you have received a vendor registration code, click here for secure registration.

**SECURE REGISTRATION**

If you have questions about PaySpan Health registration, call 877-331-7154.

**Vendor Login**

Click here for secure vendor login

**SECURE LOGIN**

### What is PaySpan Health?

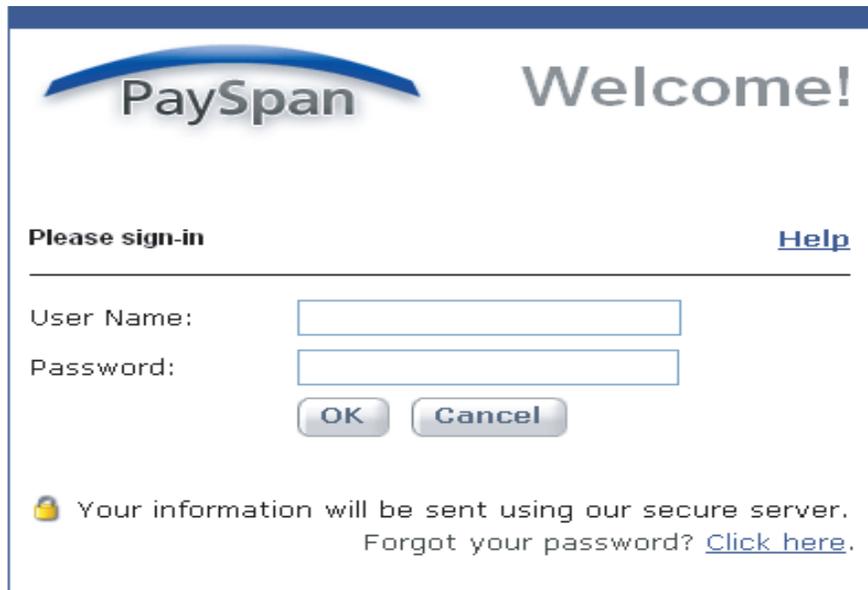
PaySpan Health delivers electronic payments and online remittances. With PaySpan Health, you stay in control over your bank accounts. The service is free, and all you need is a registration code to get started.

## To Login:

- Select the Secure Login button under Vendor Login
- The **Sign-In** screen will appear

The **Sign-In** screen is illustrated below:

---



PaySpan Welcome!

Please sign-in [Help](#)

User Name:

Password:

 Your information will be sent using our secure server.  
Forgot your password? [Click here.](#)

- Type in your User Name (email address) and Password from Step 1 of the **registration** process
- Select the OK button
- The Home Page will appear

## Home Page

The Home Page will appear (with Pending Accounts) as illustrated below when you access the website for the first time.

**PaySpan Health** Payment Center  
Questions/Comments

Home Payments Administration Preferences Help Logout

**Hello John Jones!**  
Welcome to PaySpan! Let PaySpan manage your incoming payments online and automate your reconciliation process!

Help on this page

**Pending Accounts**

To verify your bank account information, we have made a deposit to the account you entered during registration. Please enter the dollar amount of the payment that was deposited to your account.

Depository Account Number:

Deposit Amount:

**Your Accounts**

**Account : Receivables Account**  
This account is currently pending approval.

**Register New Registration Code**

Received a PaySpan RegCode from a new Payer?  
Enter it here.

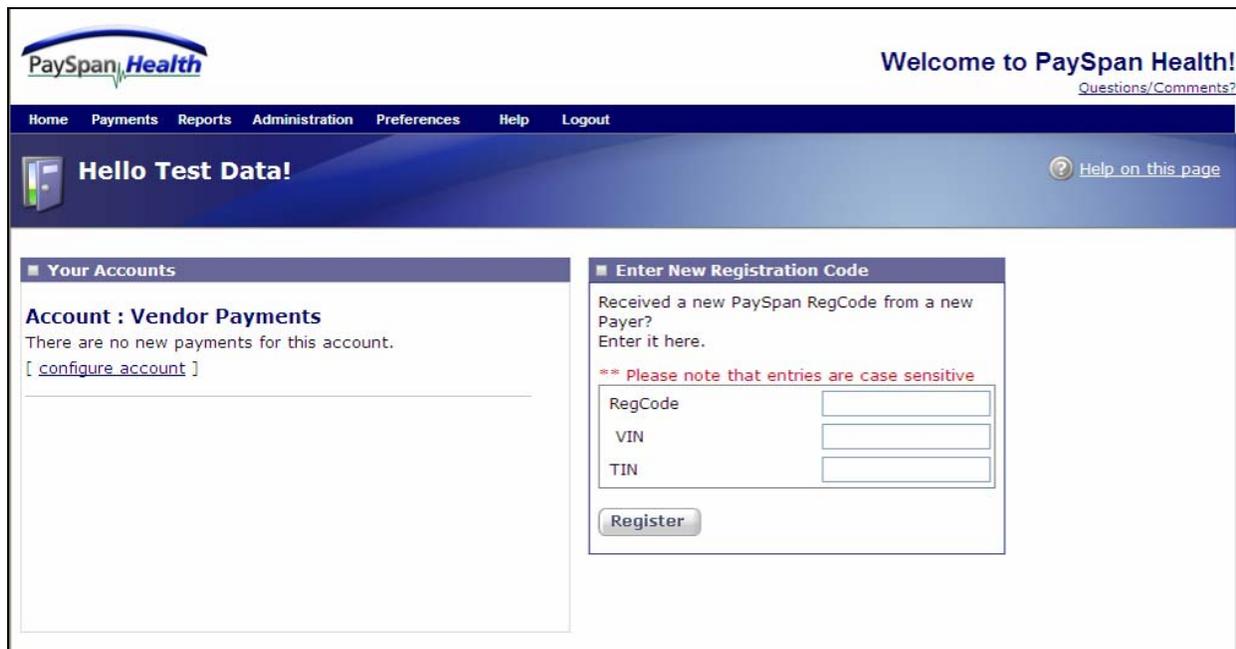
**Note:** You will need to contact your bank to verify the deposit from Payformance has been made and the amount.

### To complete the verification process:

- Select the Depository Account in the dropdown menu
- Indicate the Deposit Amount
- Select the Confirm button to finalize the verification process

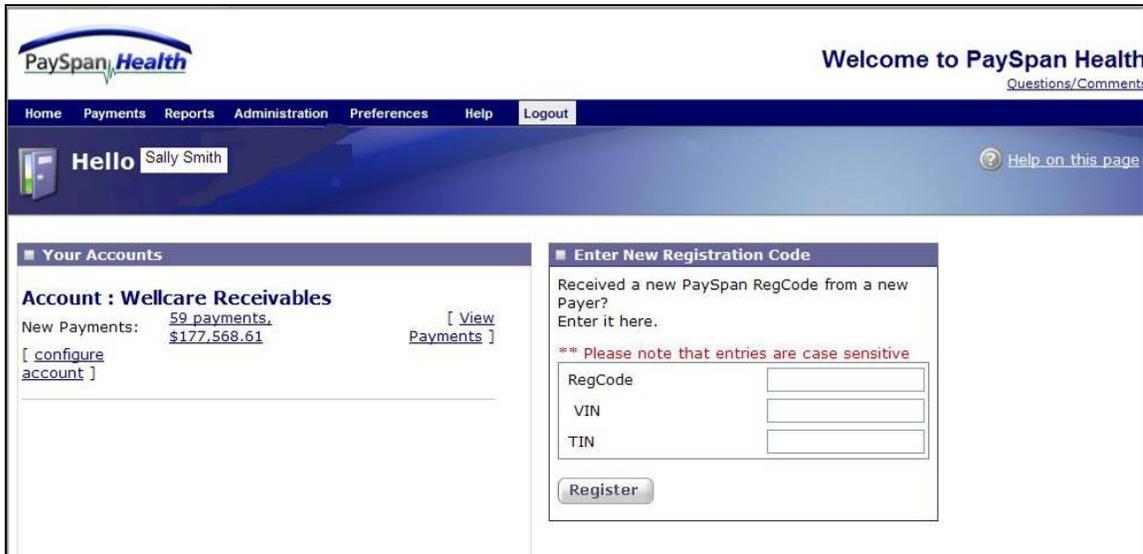
If you have an additional **Registration Code** from a new Payer you can enter it on the right side of this screen in the **Register New Registration Code** box.

The following Home Page will appear once the Receiving Account is confirmed with no new payments:



If you received payments into your account the screen will indicate a payment or payments exist and for what dollar amount as illustrated on the next page of this guide.

The following Home Page will appear the next time you log in when New Payments have been issued:



Just below the Hello text is "Your Accounts". This section identifies the Receiving Account(s) that were set up in **Step 2 of the registration** process. The example above shows the Account: WellCare Receivables with 59 new payments received.

**Note:** When you confirm the new payment(s) or the new payment, the notification will no longer be viewable from the Home Page. The Payment file can be viewed again by going through Document Archive Search screens.

If data from multiple payments is initially confirmed from one file that file can not be separated out by payments when accessed from the **Document Archive Search functionality**.

- Select the link [59 payments. \\$177,568.61](#)
- The **New Payments** screen will display as illustrated on the next page.
- The next page illustrates how the new payment page will look after an enhancement to the system has been implemented. **At this time, payments remain on the home page.**

**Note:** The next page illustrates 2 payments not 59 payments

## New Payments

New Payment data screen:

**PaySpan Health** Payment Center  
Questions/Comments?

Home Payments Reports Administration Preferences Help Logout

### New Payments

View and download all of your new payments for a single account. [Help on this page](#)

	Payment Date	Payment Type	Receiving Account	Payer Name	Check/ACH Num	Amount	Effective Date	<input checked="" type="checkbox"/>
<a href="#">View</a>	01/26/06	Check	Demo Account	Demo Health Plan	10061252	\$526.81	1/26/2006	<input checked="" type="checkbox"/>
<a href="#">View</a>	08/29/05	Check	Demo Account	Demo Health Plan	0	\$0.00	8/29/2005	<input checked="" type="checkbox"/>

Total: 2 items, \$526.81      10 items/pg      << page 1 of 1 >>

[Next](#)

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There are 2 Options available:

- Viewing payment data
- Confirming payment data by using the check box on the right and selecting the Next button on the bottom right

### Option 1 of 2

To **View New Payment** data individually by line item:

- Select the [View](#) link on the left side of the screen
- The payment detail for that check and the check will display in an Adobe format as shown on the next screen

# Payment Detail Screen:

COMPREHENSIVE HEALTH MANAGEMENT INC. / ACCOUNTS PAYABLE					No. 123456	
DATE: 12/25/2005		VENDOR NAME Sample Test Data				
INVOICE NO.	INVOICE DATE	DESCRIPTION	DISCOUNT AMOUNT	NET AMOUNT		
7028160	10/20/2005	CUST# 12690	0.00	21.19		
7028161	10/20/2005	CUST# 12690	0.00	37.05		
7028163	10/20/2005	CUST# 12690	0.00	20.33		
PLEASE DETACH AND RETAIN THIS STATEMENT AS YOUR RECORD OF PAYMENT.			<i>Thank-You</i>	\$ .00	\$78.57	

COMPREHENSIVE HEALTH MANAGEMENT INC. ACCOUNTS PAYABLE			No. 123456		
P.O. Box 25886 Tampa, FL 33622-5886			ADVISE DATE	ADVISE NUMBER	ADVISE AMOUNT
			12/25/2005	123456	\$78.57

DEPOSITED INTO THE ACCOUNT OF

Sample Test Data  
PO BOX 98765  
TAMPA, FL 33623-3604



## New Payment data screen:

The screenshot displays the 'New Payments' screen in the PaySpan Health Payment Center. The page header includes the PaySpan Health logo and the title 'Payment Center' with a link for 'Questions/Comments?'. A navigation menu contains links for Home, Payments, Reports, Administration, Preferences, Help, and Logout. The main heading is 'New Payments' with a sub-heading 'View and download all of your new payments for a single account.' and a 'Help on this page' link.

	<a href="#">Payment Date</a>	<a href="#">Payment Type</a>	<a href="#">Receiving Account</a>	<a href="#">Payer Name</a>	<a href="#">Check/ACH Num</a>	<a href="#">Amount</a>	<a href="#">Effective Date</a>	<input type="checkbox"/>
<a href="#">View</a>	01/26/06	Check	Demo Account	Demo Health Plan	1006 1252	\$526.81	1/26/2006	<input checked="" type="checkbox"/>
<a href="#">View</a>	08/29/05	Check	Demo Account	Demo Health Plan	0	\$0.00	8/29/2005	<input checked="" type="checkbox"/>

Total: 2 items, \$526.81      10 items/pg      << page 1 of 1 >>

[Next](#)

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### Option 2 of 2

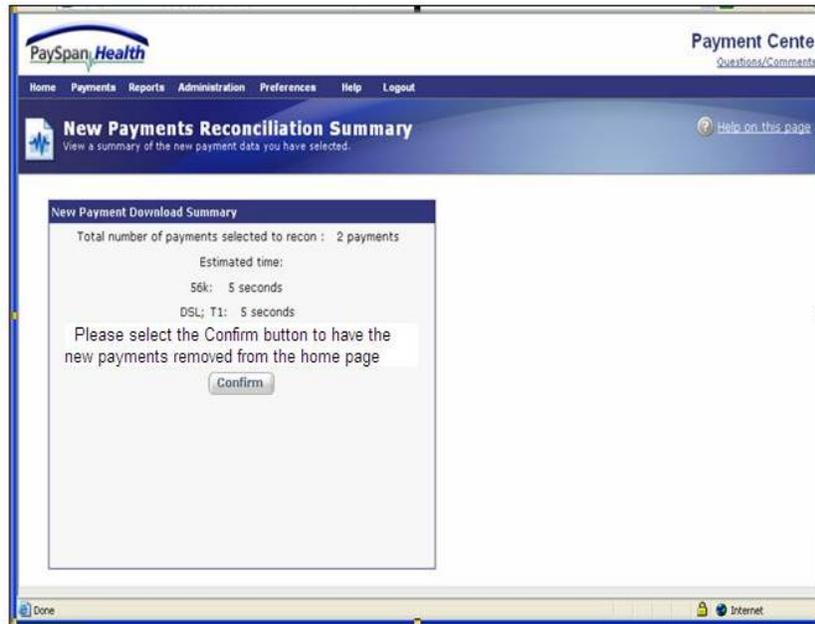
To **Confirm** all or certain **New Payment data**:

- Select the payment by checking the check boxes on the right
- Select the **Next** button

When selecting the check boxes you will receive a **New Payment Confirmation** Summary. The system will test your connection speed and provide an estimated download time from this page.

**Note:** If data from multiple payments is initially confirmed in one file that file can not be separated out by payments when accessed from the **Reconciliation History**.

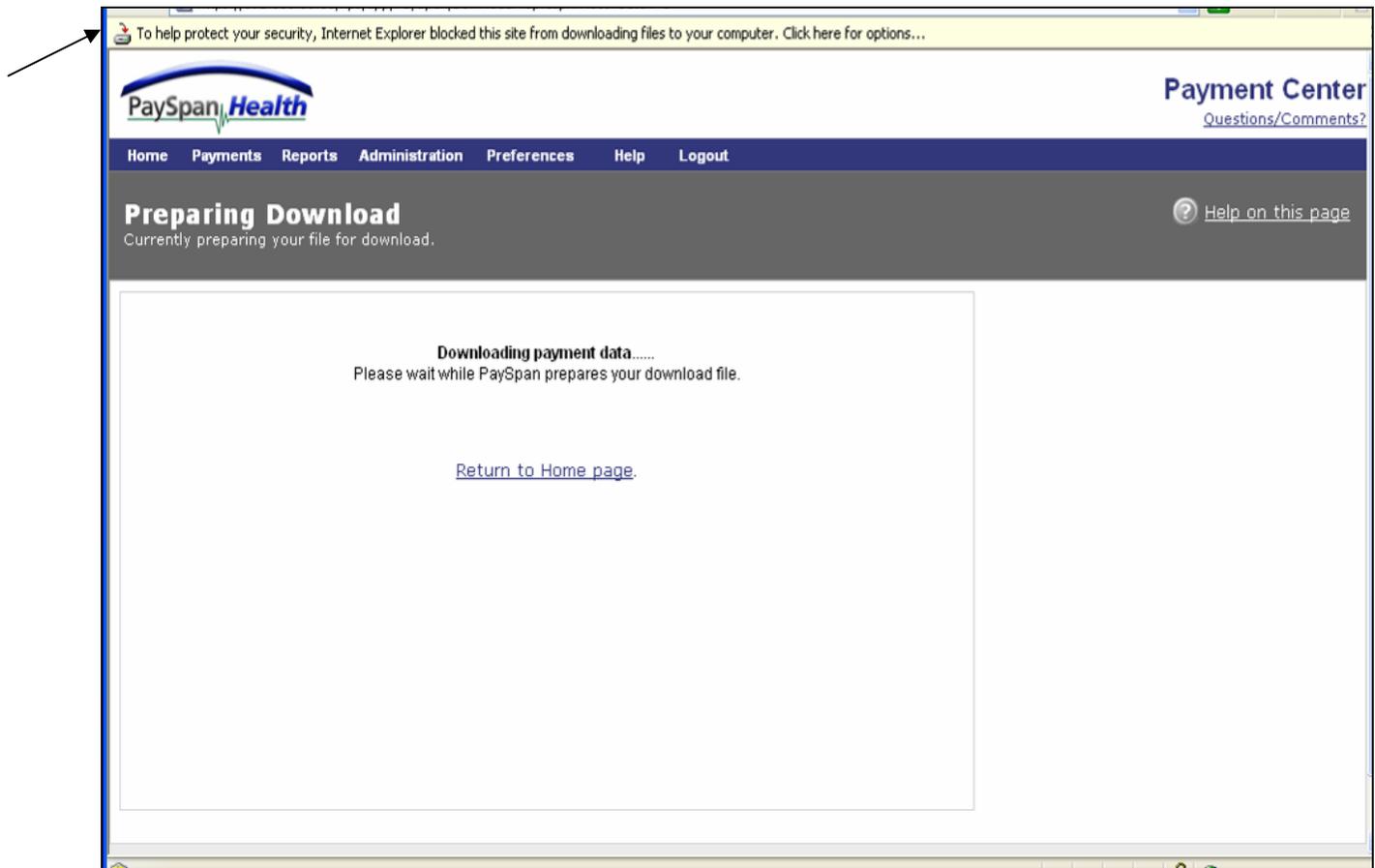
## New Payment Download Summary:



### Remember:

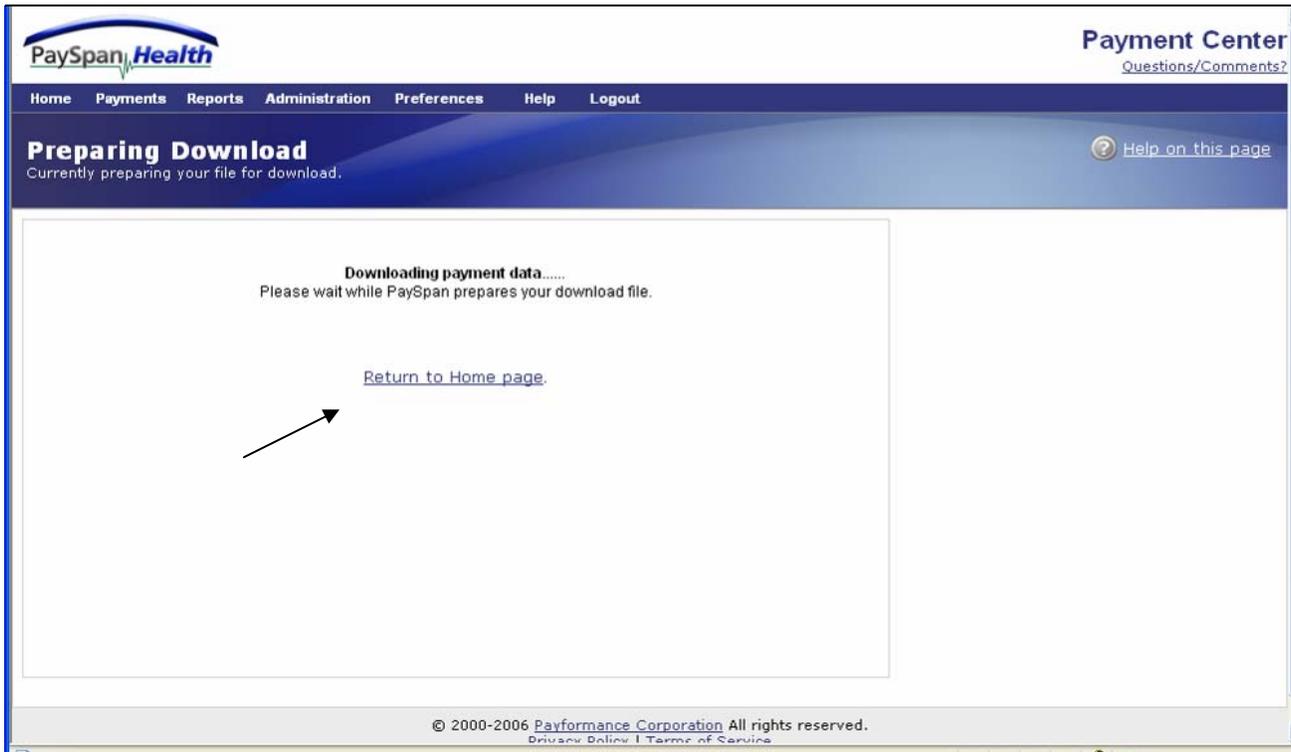
- Selecting the **Confirm Button** will remove the New Payments from showing on your Home Page
  - Select the Confirm button
  - Popup Blockers may require you to approve the download of the file
  - An example Popup Blocker is displayed on the next page of this guide

## Sample of a Popup Blocker:



- Popup blockers appear on occasion. Click on the line for options
- Save this file

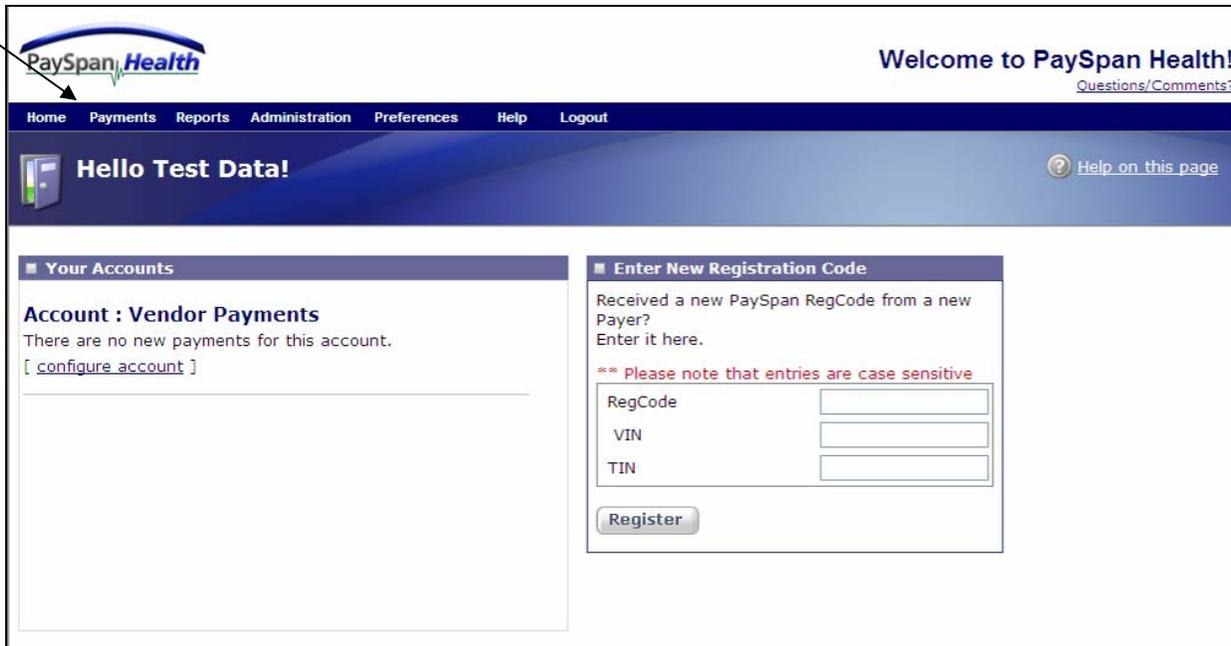
After the Confirmation is completed:



- To view how the Home Page will appear after confirming the payment data click on the [Return to Home page](#) link
- The Home Page screen is illustrated on the following page

## Payments

After New Payments have been confirmed the Home Page will appear as illustrated below:



- Select the Payments Link in the top navigation bar to view various options
- Select the **Account Management** link

## Account Management

The Account Management Screen is displayed below:

PaySpan Health

Payment Center  
[Questions/Comments?](#)

Home Payments Reports Administration Preferences Help Logout

### Account Management

View a summary of all the PaySpan Receiving Accounts you have been granted access.

[Help on this page](#)

New Account

Name	Accounting Pkg	EFT	Status	
Demo Account	General HealthCare	Yes	Active	<a href="#">view payments</a>   <a href="#">edit</a>   <a href="#">grant access</a>

Total: 1 item      10 items/pg      << page 1 of 1 >>

Show Inactive Accounts

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The **Account Management** screen allows you to view the status of the receiving account, view the payments, edit the Receiving Account, and grant access to Receiving Account. In addition, the option to add a new Receiving Account by clicking on the **New Account** button.

- Select the [view payments](#) link. This will navigate to the Document Archive Search which will be discussed later in this document
- Select the [edit](#) link. The following **Edit Receiving Account** Screen will appear:

## Edit Receiving Account:

The screenshot displays the 'Edit Receiving Account' interface within the PaySpan Health Payment Center. The page header includes the PaySpan Health logo, the title 'Payment Center', and a link for 'Questions/Comments?'. A navigation menu contains 'Home', 'Payments', 'Reports', 'Administration', 'Preferences', 'Help', and 'Logout'. The main heading is 'Edit Receiving Account' with a sub-heading 'Modify selective configuration information associated with a Receiving Account.' and a 'Help on this page' link.

The 'Account Details' section contains the following information:

Account Name	Demo Account
Account Description	<input type="text"/>
Account Number	*****0011
Routing Number	*****0015
Account Type	Business Checking

At the bottom of this section are 'Save' and 'Cancel' buttons.

The 'Account Status' section displays the message: 'This account is currently active.' with a 'De-Activate' button. A note below states: 'Note: You cannot de-activate this account while payers are assigned to it. Please remove all assigned payers if you would like to de-activate this account.'

At the bottom of the page, the copyright notice reads: '© 2000-2006 Payformance Corporation All rights reserved. Privacy Policy | Terms of Service'.

### ***Edit Receiving Account***

This screen allows modification to the Receiving Account description. This screen will not allow changes to the Account Number or Routing Number. If changes are necessary you must establish a new account and then De-Activate the old account.

To deactivate an account no longer in use, select the **De-Activate** button in the **Account Status** dialog box. The account will not be removed completely. The status will indicate inactive.

## New Accounts

New accounts are set up by selecting the **New Account** button on the **Account Management** main screen:

Payment Center  
[Questions/Comments?](#)

Home Payments Reports Administration Preferences Help Logout

### Account Management

View a summary of all the PaySpan Receiving Accounts you have been granted access. [Help on this page](#)

[New Account](#)

Name	Accounting Pkg	EFT	Status	
Demo Account	General HealthCare	Yes	Active	<a href="#">view payments</a>   <a href="#">edit</a>   <a href="#">grant access</a>

Total: 1 item      10 items/pg      << page 1 of 1 >>

Show Inactive Accounts

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## New Account Information:

The screenshot shows the 'Create Receiving Account' form in the PaySpan Health Payment Center. The form is titled 'Create Receiving Account' and includes a sub-header 'Create a new Receiving Account to receive payment data.' The form is divided into sections for 'Account Information' and 'Enable EFT'. The 'Account Information' section contains several input fields: 'Account Name', 'Account Description', 'Routing Number', 'Account Number', 'Verify Account Number', and 'Account Type'. The 'Account Type' dropdown menu is currently set to 'Business Checking'. The 'Enable EFT' section has a checked checkbox. A legend indicates that an asterisk (\*) denotes a required field. At the bottom of the form are 'Cancel' and 'Next' buttons.

**PaySpan Health** Payment Center  
Questions/Comments?

Home Payments Reports Administration Preferences Help Logout

**Create Receiving Account**  
Create a new Receiving Account to receive payment data. [Help on this page](#)

**Account Information**

Account Name  \* This is the name that will be used to identify this receiving account throughout the PaySpan system.

Account Description  This field is optional. It is provided for additional details on an account.

Routing Number  \* Enter your EFT/ACH Routing Number - This number may or may not be the same as that on the bottom of your check. Some accounts are specifically configured for EFT/ACH payments. Please contact your Financial Institution to verify your EFT/ACH Routing Number.

Account Number  \* This is the account number assigned by your financial institution. The routing and account number fields are only required for ACH payments.

Verify Account Number  \*

Account Type

\* indicates required field

Enable EFT  This check box indicates whether the bank account will receive EFT payments from registered payers. Please make sure it is checked if you would like to enable EFT payments for this account.

Once the account is set-up the Account will be in "Pending" status until confirmed.

## Account Management Main screen:

PaySpan Health Payment Center  
[Questions/Comments?](#)

Home Payments Reports Administration Preferences Help Logout

### Account Management

View a summary of all the PaySpan Receiving Accounts you have been granted access. [Help on this page](#)

Receiving Accounts

Name	Accounting Pkg	EFT	Status	
Demo Account	General HealthCare	Yes	Active	<a href="#">view payments</a>   <a href="#">edit</a>   <a href="#">grant access</a>

Total: 1 item      10 items/pg      << page 1 of 1 >>

Show Inactive Accounts

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- Select the [grant access](#) link
- The screen will display the **Account Access** with the various Access tabs including: the Account Access, Feature Access, and the Report Access options as illustrated on the following page

## Account Access

**PaySpan Health** **Payment Center**  
[Questions/Comments?](#)

Home Payments Reports Administration Preferences Help Logout

### Account Access

Modify the users that have access to a given account. [Help on this page](#)

Account Access Feature Access Reports Access

**Note:** You must click "Save" to save any changes.

Select:

Users without Access	Users with Access
	Sally Smith

→  
←

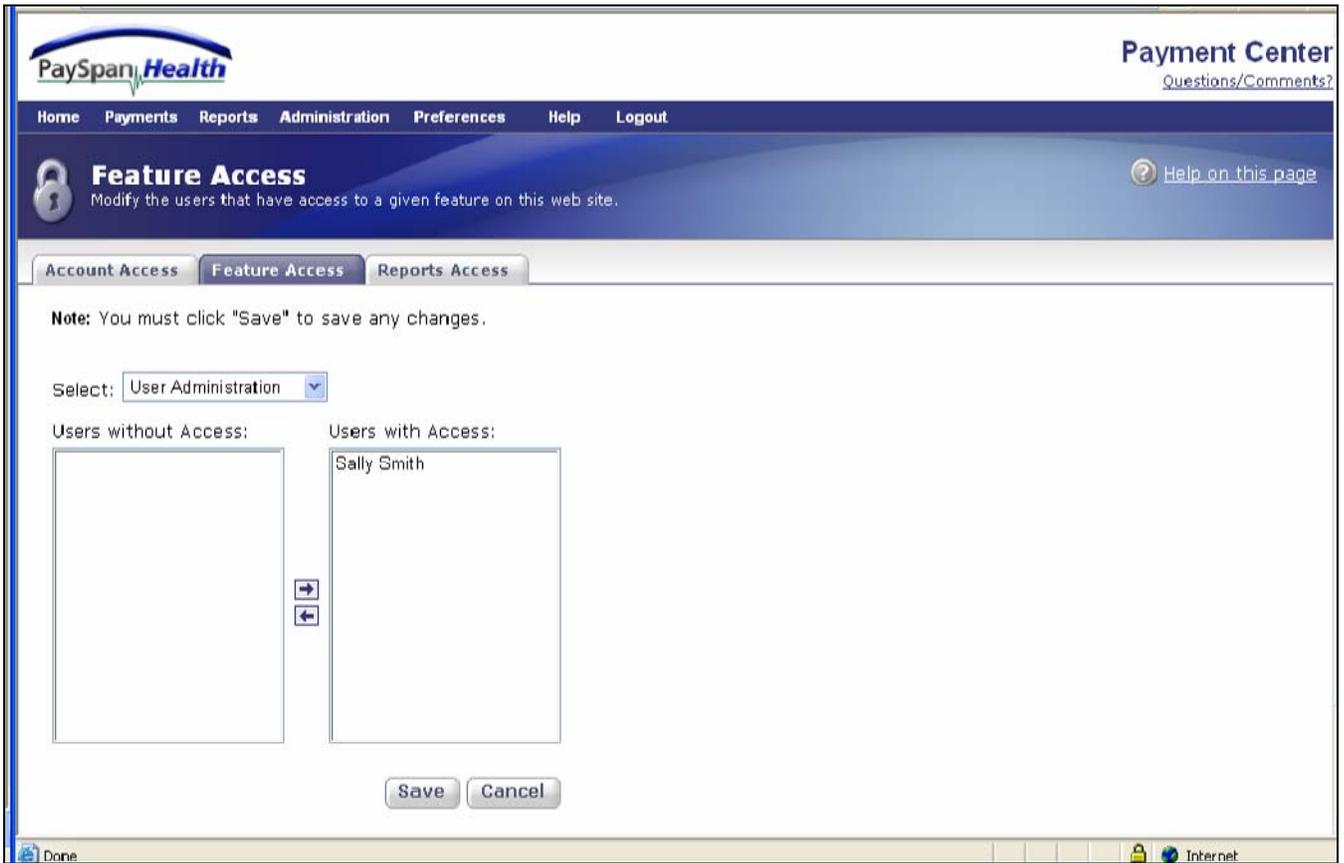
Save Cancel

Done Internet

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

- Select the **Feature Access** tab

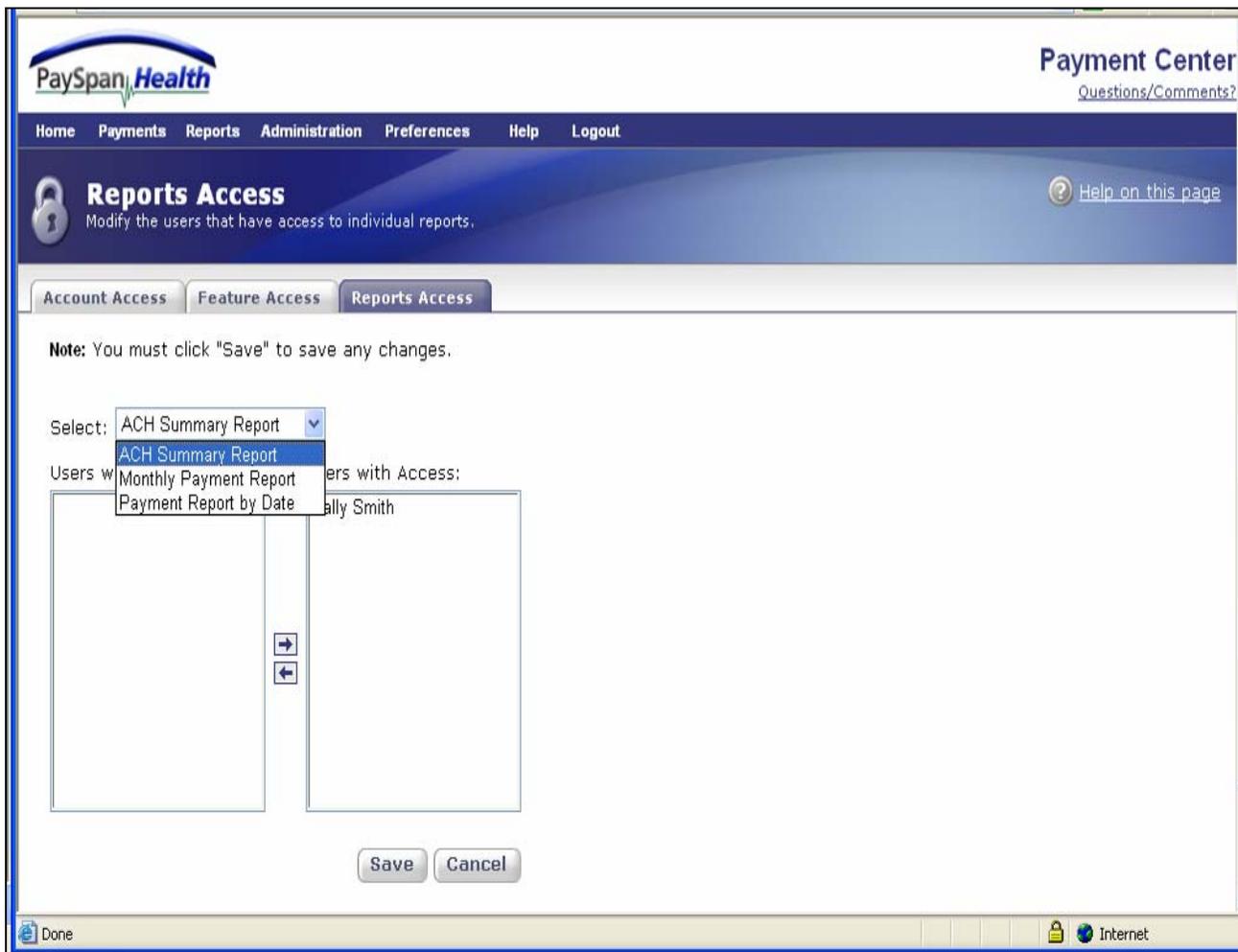
The **Feature Access** Screen is illustrated below:



The **Feature Access** screen allows the administrator the ability to grant or revoke feature access for specific users.

- Select the **Reports Access** tab

The Reports Access screen is illustrated below:



The **Reports Access** Screen allows the administrator the ability to grant or revoke report access to specific users.

## Payer Management:

Under the **Payments** dropdown

- Select **Payer Management**

The following Payer Management Screen will appear:

**PaySpan Health** Payment Center  
Questions/Comments?

Home Payments Reports Administration Preferences Help Logout

### Payer Management

View a summary of all the registered PaySpan Payers that you have been granted access. Help on this page

Company	Receiving Account	EFT	Status	
Demo Health Plan	Demo Account	Yes	Active	<a href="#">view payments</a>   <a href="#">edit</a>

Total: 1 item 10 items/pg << page 1 of 1 >>  
Show Inactive Payers

**Register New Payer**  
Reg Code

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This screen allows the option to [view payments](#) from registered PaySpan Payers. The [edit](#) link allows editing to the Payer Information.

- Select the [edit](#) link

The Edit Payer screen is illustrated below:

**Edit Payer**  
Modify Payer configuration and allow them to deliver your payments by assigning them to an active receiving account.

[Help on this page](#)

**Payer Information**

Name Demo Health Plan  
Address  
Phone 1-757-490-6900

**Assign Payer Designation**

Current Designation  
1234

Request paper remittance advice from payer

**Assign to Receiving Account**

[Create New Account](#)

Demo Account

Save Cancel

**Payer Status**

This payer is currently active.

De-Activate

This screen allows the Vendor to modify the name associated with the payer. A payer can be deactivated by selecting the **De-Activate** button in the **Payer Status** box. By deactivating the payer electronic payments will no longer be received.

# Reports

## Document Archive

The Document Archive screen for Payments is illustrated below:

The screenshot shows the PaySpan Health Document Archive interface. At the top, there is a navigation bar with links for Home, Payments, Reports, Administration, Preferences, Help, and Logout. The main header area includes the PaySpan Health logo and a welcome message. Below this, the 'Document Archive' section is active, with a sub-tab for 'Wellcare Receivables'. The search criteria are set to 'Payments'. The 'Effective Date' is selected, with a date range from 'This Week' to a date field. Other search criteria include 'Check/ACH Num', 'Amount', 'Payment Type' (set to 'All'), 'Payment Date', 'Account ACH Enabled', 'Import Batch ID', 'Remittance ID', and 'Payer Name'. A 'Search' button is visible at the bottom.

The Receiving Accounts available are displayed as tabs across the screen. First select the appropriate tab for searching the archive. Specify as much or as little information as desired for the search.

- Selecting the **Search** button without criteria will return results limiting to 1,000 records

The Document Archive screen for Invoice is illustrated below:

The screenshot shows the PaySpan Health Document Archive interface with the search criteria set to 'Invoice'. The 'Invoice Number' field is empty. The 'Invoice Amount' field is empty. The 'Invoice Date' is selected, with a date range from 'This Week' to a date field. Other search criteria include 'Invoice Number', 'Invoice Amount', 'Invoice Date', and 'Date Period'. A 'Search' button is visible at the bottom.

## Run a report

### Select the Run a Report from the dropdown

PaySpan Health

Welcome to PaySpan Health!  
[Questions/Comments?](#)

Home Payments **Reports** Administration Preferences Help Logout

Document Archive Search  
 Run a report Help on this page

Search for and view payments from the Document Archive.

Wellcare Receivables

Specify as much or as little information as necessary. [Help on Search Criteria](#)

Search by: Invoice

Select the type of search from the list

Invoice Number:  Character field. No decimals, dashes, or punctuation. Supports exact match or wildcards, e.g. 111224444 11ERDP1000 A7T8\*

Invoice Amount:  Numeric field. Supports exact match or ranges, e.g. 510.32 10-1000 <500 >1000

Invoice Date:  to

or

Date Period: This Week

Clear Search Save

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### The available Reports will appear as illustrated below:

PaySpan Health

Welcome to PaySpan Health!  
[Questions/Comments?](#)

Home Payments Reports **Administration** Preferences Help Logout

Reports Help on this page

Below are the reports you have saved, as well as public reports to which you have been given access. You may only edit reports that you created. HELPFUL HINT (or USER TIP): Depending on browser requirements, you may need to press the Control ('Ctrl') key when launching an Excel report.

Wellcare Receivables

To grant user access to shared reports, [go to Security Administration](#).  
 Note: The report creator will always have access to the reports they create.

Report Name	Format	Access	Schedule	Last Scheduled Run
ACH Summary Report	Payments Report Template	Shared	None	<a href="#">run</a>
Monthly Payment Report	Payments Report Template	Shared	None	<a href="#">run</a>
Payment Report by Date	Payments Report Template	Shared	None	<a href="#">run</a>

Total: 3 items  items/pg << page  of 1 >>

Add

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By selecting the **Add** button the screen will return to the **Document Archive Search** where a new report can be ran and saved.

### Save/Edit Reports:

PaySpan Health  
Welcome to PaySpan Health!  
[Questions/Comments?](#)

Home Payments Reports Administration Preferences Help Logout

### Save/Edit Report

Save a set of search criteria for future use and for sharing with other users. Customize the report output by selecting a format.

Application: Wellcare Receivables  
Searching by Payments

Report Name:

Accessibility:  Private  Shared

Output Format: Excel Export

Schedule:  
 None  Daily  Weekly  Monthly

Run at: 12:00 AM

Field Name	Criteria	Prompt at Runtime*
Effective Date		<input type="checkbox"/>
Check/ACH Num		<input type="checkbox"/>
Amount		<input type="checkbox"/>
Payment Type		<input type="checkbox"/>
Payment Date		<input type="checkbox"/>
Account ACH Enabled		<input type="checkbox"/>
Import Batch ID		<input type="checkbox"/>
Remittance ID		<input type="checkbox"/>
Payer Name		<input type="checkbox"/>

\*If checked, user will be prompted for selected field values when the report is executed

Save Cancel

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Scheduling reports and the Search Criteria are setup in this screen. By checking the appropriate boxes in the Criteria section a prompt will ask for selected field values at run-time.

Once the report has been saved, the screen will revert back to the display report screen and the new report will appear in the list. The user-defined report has the additional options of **View**, **Edit** and **Delete**.

PaySpan comes with three standard pre-packaged reports.

- ACH Summary Report
- Monthly Payment Report
- Payment Summary by Date

Only the user-defined reports can be modified or deleted. All pre-packaged reports within PaySpan cannot be modified or deleted. A link is available on this screen to **go to Security Administration** to grant access to shared reports.

## Administration

PaySpan has a Security model that allows corporate 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 Vendor 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 Vendor site using e-mail Users.
- View user history of past activities on the web site through the Activity Log.

## 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.

## User Administration

PaySpan Health Payment Center  
[Questions/Comments?](#)

Home Payments Reports Administration Preferences Help Logout

### User Administration

Add users or edit user profile and security access rights. [Help on this page](#)

Click on the user's full name to edit.

Search By:

Search Value:

Full Name	User Name	Active
<a href="#">Jon William</a>	jon@pfc.com	<input checked="" type="checkbox"/>
<a href="#">Sammy Cook</a>	sam_cook@pfc.com	<input checked="" type="checkbox"/>

Show Inactive Users

Total: 2 items  items/pg << page  of 1 >>

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The User Administration screen allows viewing, adding and editing registered users. Only a group administrator will have access to this page.

To add a user:

- Click on the **Add User** button
- The following screen illustrates the **Add User** fields

## Adding a User

The screenshot shows the 'Add/Edit User' page in the PaySpan Health system. The page has a blue header with the PaySpan Health logo and navigation links: Home, Payments, Reports, Administration, Preferences, Help, and Logout. A 'Welcome to PaySpan Health!' message is in the top right corner, with a link for 'Questions/Comments?'. A 'Help on this page' link is also present.

The main content area is divided into two columns:

- User Profile:** Contains fields for 'User Name \*', 'Password \*', 'Confirm Password \*', and 'Password Expires Next Logon' (checked). Below these are fields for 'Full Name\*', 'Phone Number', 'Email Address\*', 'Email Address Type' (set to 'Plain Text'), 'Email Address 2', and 'Email Address 2 Type' (set to 'Plain Text'). A note at the bottom states: '\*\*Please Note\*\* User Name is the individual's email address'.
- Security Access:** Contains three sections of checkboxes:
  - Applications:** Wellcare Receivables (unchecked).
  - Features:** User Administration, View Documents, Notifications, Document Archive, Account Management, Payer Management, Reconcile Payments (all unchecked).
  - Shared Queries:** ACH Summary Report, Monthly Payment Report, Payment Report by Date (all unchecked).

At the bottom of the form are three buttons: 'Reset', 'Save', and 'Cancel'.

- The **User Profile** identifies the user's email address as the **User Name**. The rest of the required information is indicated with the red star. These fields must be filled out.

*Your password must be at least 8 characters long and must include at least 3 of the following 4 types of characters: lowercase letters, uppercase letters, numbers, and non-alphanumeric characters.*

- **Security Access identifies** what accounts are set up in the system and who has access to which accounts. An individual can have access to all accounts or just one based on the check boxes.
- **Features** identify the security a Vendor can have when access is given. The navigation bar on the web page will indicate in the dropdown based on this screen what levels of security a Vendor has.
- **Reports** are viewed if any or all of the check boxes are identified.

## Email Users

The Email Users screen is displayed below:

PaySpan Health

Online Payments and Remittance  
[Questions/Comments?](#)

Home Jobs Reports Administration My Account Help Logout

**Email Users**  
Select your criteria from the list below and click Send.

User Administration  
Security Administration  
Role Administration  
Email Users  
Activity Log

mail. To email all users, simply

Help on this page

Status:  
 Active  
 Inactive  
 Both

Send Cancel

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The above screen allows the administrator to email active, Inactive or both users.

## Activity Log

The screen below displays the Activity log when selected from the dropdown option:

PaySpan Health

Payment Center  
Questions/Comments?

Home Payments Reports Administration Preferences Help Logout

**Activity Log**  
Review your past activity at the Payment Center. User Administrators may review all users' activity.

Help on this page

Filter By User: All Filter By Date: Last Day

User Name	Severity	Date Time	Message	Alias	Source
sally@test.com	Activity	3/7/2006 2:57:30 AM	Ran archive query, 0 results	N	PaySpan
sally@test.com	Activity	3/7/2006 2:52:22 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:51:21 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:49:32 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:48:40 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:48:20 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:48:11 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:48:07 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:48:01 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:47:56 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:47:32 AM	sally@test.com logged in.	N	PaySpan
sally@test.com	Activity	3/7/2006 2:36:50 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:36:43 AM	Confirmed and downloaded 2 payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 2:24:18 AM	sally@test.com logged in.	N	PaySpan
sally@test.com	Activity	3/7/2006 2:24:17 AM	sally@test.com logged in.	N	PaySpan
sally@test.com	Activity	3/7/2006 2:17:36 AM	Ran archive query, 3 results	N	PaySpan
sally@test.com	Activity	3/7/2006 1:19:40 AM	Confirmed 2 new payment(s).	N	PaySpan
sally@test.com	Activity	3/7/2006 1:01:34 AM	sally@test.com logged in.	N	PaySpan

This **Activity Log** can be filtered (by using the dropdown arrows) to display certain users and it can also be filtered by date. This **Activity Log** is never purged. Other data throughout the system is available on line for 18 months.

**PaySpan Health** **Payment Center**  
[Questions/Comments?](#)

[Home](#) [Payments](#) [Reports](#) [Administration](#) [Preferences](#) [Help](#) [Logout](#)

**Edit Profile** ? [Help on this page](#)  
Modify your contact information

**Edit Profile** **Change Password**

Full Name\*:

Email Address\*:

Email Address Type:  ▼

Email Address 2:

Email Address 2 Type:  ▼

Phone Number:  -  -  ext:

Password Challenge Question:  ▼

Password Challenge Answer\*:

### ***Edit Profile***

The Vendor may edit their profile by selecting the **Edit Profile** tab. The default profile data will display which is the information of the current user logged into the PaySpan system. Edits can only be made to the profile of the current user. If changes are made, the Vendor must save the changes before exiting.

## ***Change Password***

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

The user must enter the old password before changing to a new one. The user will be prompted to confirm the new password. The save button must be selected once the Vendors has successfully confirmed their new password entry before exiting the screen.

*Your password must be at least 8 characters long and must include at least 3 of the following 4 types of characters: lowercase letters, uppercase letters, numbers, and non-alphanumeric characters.*

## Help Tab

The screenshot shows the PaySpan Health website interface. At the top left is the PaySpan Health logo. At the top right, it says "Welcome to PaySpan Health!" with a link for "Questions/Comments?". Below this is a navigation bar with tabs for Home, Payments, Reports, Administration, Preferences, Help, and Logout. The "Help" tab is selected, showing a dropdown menu with "Contents and Index", "Help on this page", and "About". The "Change Password" form is visible, with fields for "Old Password:", "New Password:", and "Confirm Password:", and "Save" and "Cancel" buttons. At the bottom, there is a copyright notice: "© 2000-2006 Payformance Corporation All rights reserved. Privacy Policy | Terms of Service".

Under the Help Tab is the Contents and Index, Help on this page, and About. The Contents and index provide additional information about PaySpan. Help on this page will give information on what is needed to return data results. The About is the version PaySpan is currently using.

## Log Out

By selecting the Logout tab in the navigation bar the following screen will appear:

The screenshot shows the PaySpan Health website after a successful logout. The PaySpan Health logo is at the top. Below it, the text "Logout Successful" is displayed. Underneath, it says "Welcome to PaySpan Health!" and provides a link for "[ Login Again ]".