eSolutions

Strengthen your revenue health

myEasyView® 5.5

Training Guide

August 2020

Apex Revenue Technologies
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Document Revision History		
Revision Number	***Revision Description***	***Revision Date***
1	New User Guide	0/09/2020

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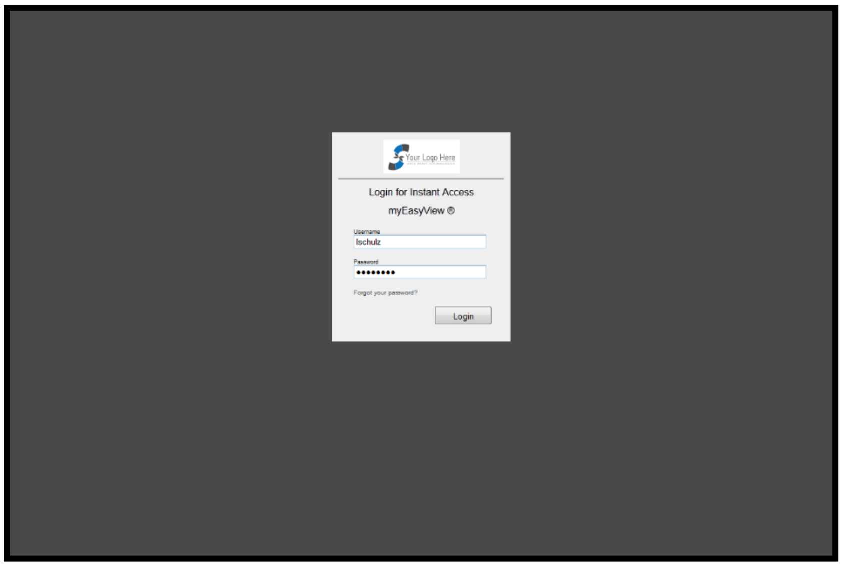
I. Overview

MyEasyView® is an online application that allows you to manage documents and files, search and view documents, take payments over the phone, view reports, and enroll end users in e-statements. MyEasyView® provides a variety of features to better manage your accounts receivable and inbound calls. This document will provide a brief overview of how to use myEasyView®.

II. Login Screen

Login URL: http://<organizationname>.myeasyview.com



III. File Management

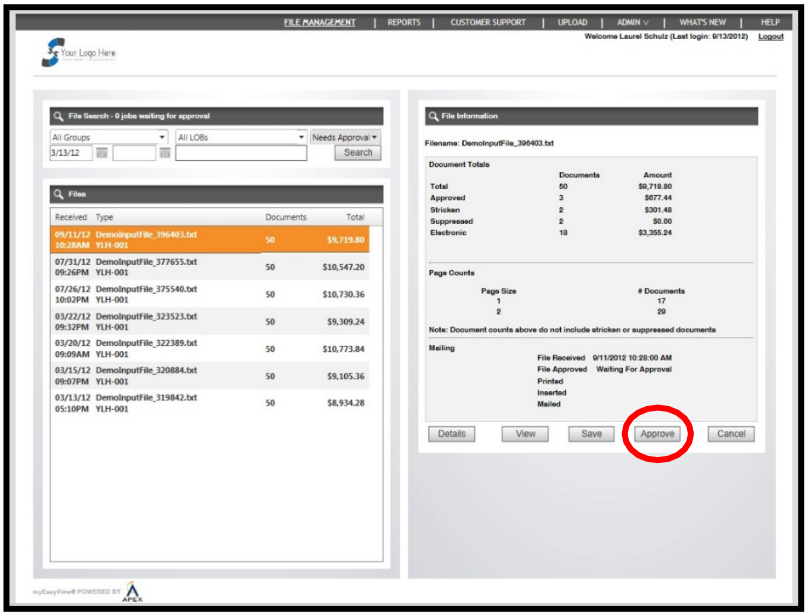
The **File Management** tab displays all files that have been uploaded. In this tab you can:

- See the status of recently uploaded files
- Approve files
- Stop/cancel files with errors or files that were uploaded incorrectly
- Strike specific documents from files prior to approval
- Review all archived files
- Conduct a file search – search for a specific file you have uploaded
- Conduct a document search – search for a specific document record within a file
- Apply a custom message to individual documents within a file and create internal notes when approving or striking documents
- Access the file summary, which includes the total number of documents within the file, number of approved documents, number of stricken documents, number of suppressed documents, and the total amount due of all documents in a file.

A. Approve a file without reviewing document PDFs

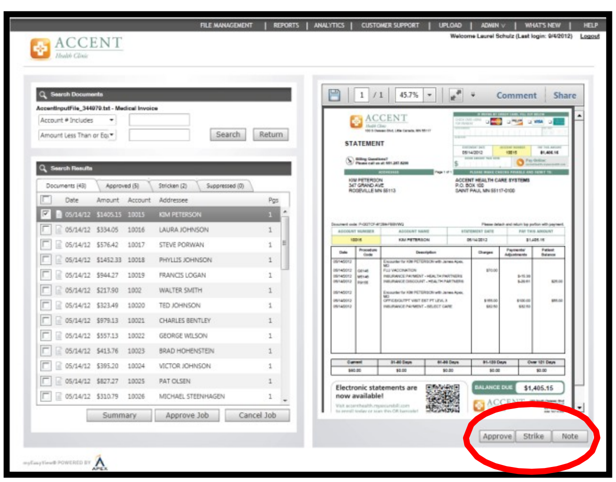
1. Search for files that need approval by date, group, and/or LOB (line of business). All files awaiting approval will be in **BOLD**.
2. Select the file you want to approve and click on the **Approve** button on the right side of screen.

3. To finalize the approval of the job, click the **Approve Job** button; to cancel the job, click the **Cancel Job** button.



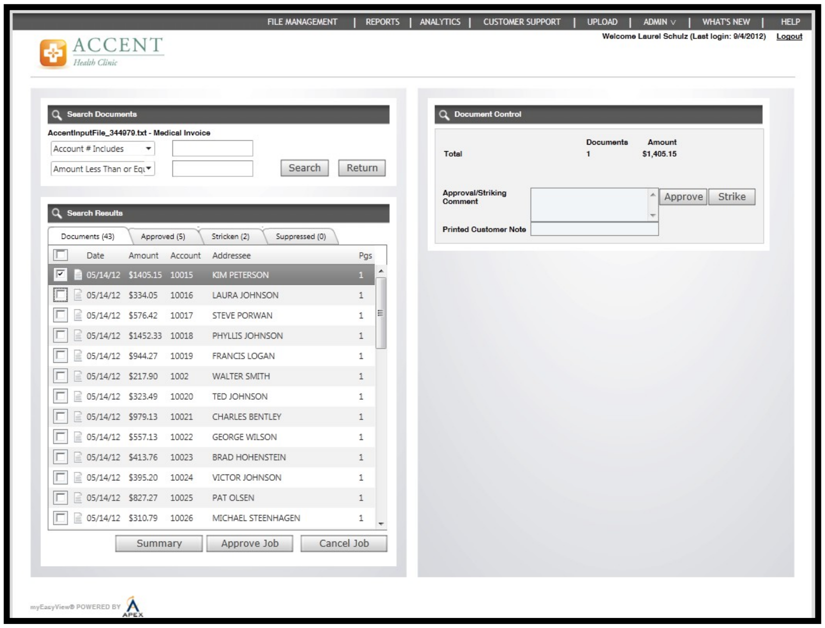
B. Review documents before approving a file

1. Search for files awaiting approval by date, group, and/or LOB. Files awaiting approval are BOLD.
2. Select the file you want to approve, and then click the Details button on the right side of the screen.
3. Select individual or multiple documents, then select the appropriate button on the right side: Strike or Approve.



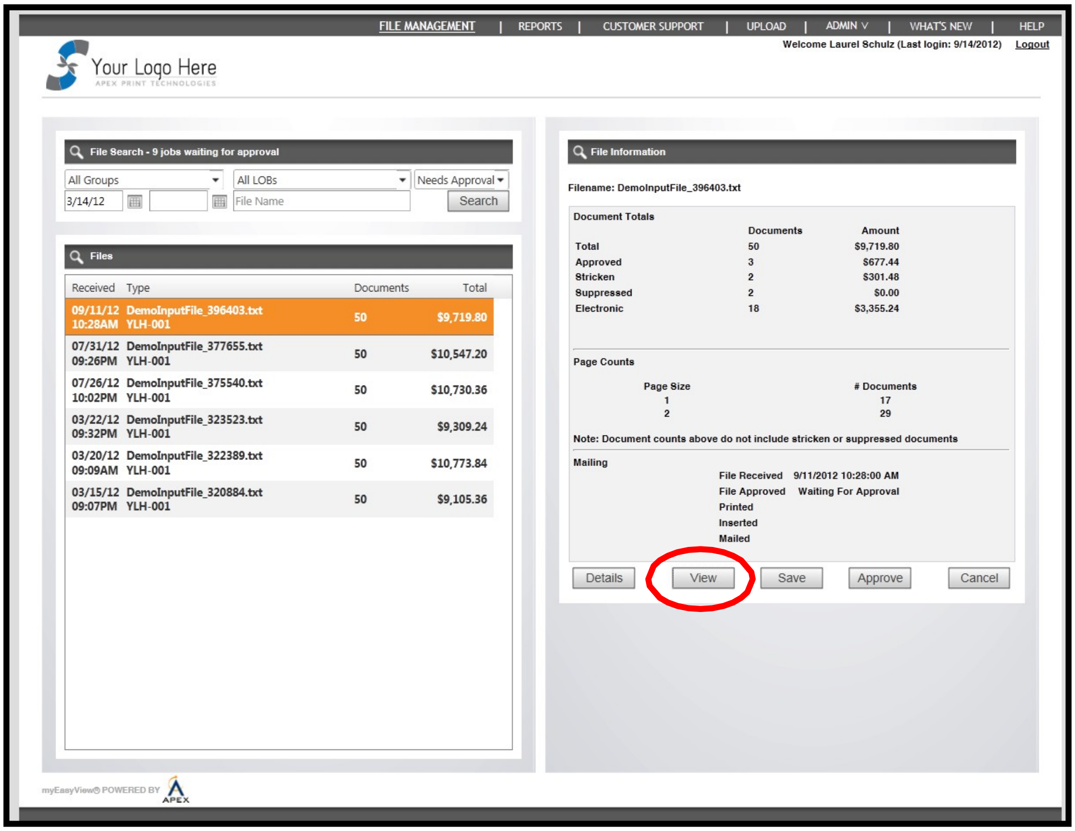
C. Add a note to a document (internal)

1. Within the details page, the **Note** button will add an internal note to the selected document.



D. View all documents in a file

1. Search for file by date, group, and/or LOB.
2. Select the file you wish to view. Then click the **View** button on the right side to access one PDF containing all documents from the selected file.



**The PDF will appear in a separate window containing all documents from that file*

YLH-321

Your Logo Here
APEX PRINT TECHNOLOGIES

STATEMENT

Billing Questions?
Please call us at: 651.287.8200

IF PAYING BY CREDIT CARD, FILL OUT BELOW

CHECK CARD USING FOR PAYMENT ☐ MasterCard ☐ DISCOVER ☐ VISA ☐ AMERICAN EXPRESS

CARD NUMBER | EXP. DATE M M Y Y

SIGNATURE

STATEMENT DATE	ACCOUNT NUMBER	PAY THIS AMOUNT
09/11/12	1000	$200.48

SHOW AMOUNT PAID HERE $

Pay Online: accenthealth.mysecurebill.com

ADDRESSEE Page 1 of 2

BILL SMITH
1667 CITRUS AVE
SAINT PAUL MN 55887

PLEASE MAKE CHECKS PAYABLE AND REMIT TO:

YOUR LOGO HERE SYSTEMS
P.O. BOX 100
SAINT PAUL MN 55117-0100

myEasyMatch Code: P-QGNQT-56493-DBDNKK

Please detach and return top portion with payment.

ACCOUNT NUMBER	ACCOUNT NAME	STATEMENT DATE	PAY THIS AMOUNT
1000	BILL SMITH	09/11/12	$200.48

Date	Procedure Code	Description	Charges	Payments/ Adjustments	Patient Balance
08/26/12		**Encounter for Bill Smith with James Apex, MD**			
08/26/12	G0145	FLU VACCINATION	$70.00		
08/26/12	G0145	FLU VACCINATION	$70.00		
08/31/12		INSURANCE PAYMENT - HEALTH PARTNERS		$-15.39	
08/31/12		INSURANCE PAYMENT - HEALTH PARTNERS		$-15.39	
08/31/12		INSURANCE DISCOUNT - HEALTH PARTNERS		$-29.61	$25.00
08/31/12		INSURANCE DISCOUNT - HEALTH PARTNERS		$-29.61	$25.00
08/26/12		**Encounter for Bill Smith with Joe Johnson, MD**			
08/26/12	99212	OFFICE/OUTPT VISIT EST LEVL II	$71.00		
08/26/12	99212	OFFICE/OUTPT VISIT EST LEVL II	$71.00		
08/31/12		INSURANCE PAYMENT - MEDICA		$25.00	
08/31/12		INSURANCE PAYMENT - MEDICA		$25.00	
08/31/12		CR CONTRACTUAL ALLOW - MEDICA		$21.00	$25.00
08/31/12		CR CONTRACTUAL ALLOW - MEDICA		$21.00	$25.00
08/26/12		**Encounter for Bill Smith with John Smith, MD**			
08/26/12		OFFICE/OUTPT VISIT EST PT LEVL 3	$155.00		
08/26/12		OFFICE/OUTPT VISIT EST PT LEVL 3	$155.00		
08/31/12		PATIENT/GUARANTOR PAYMENT		$20.00	$135.00
08/31/12		PATIENT/GUARANTOR PAYMENT		$20.00	$135.00

Current	31-60 Days	61-90 Days	91-120 Days	Over 121 Days
$200.48	$0.00	$0.00	$0.00	$0.00

Electronic Statements are now available!

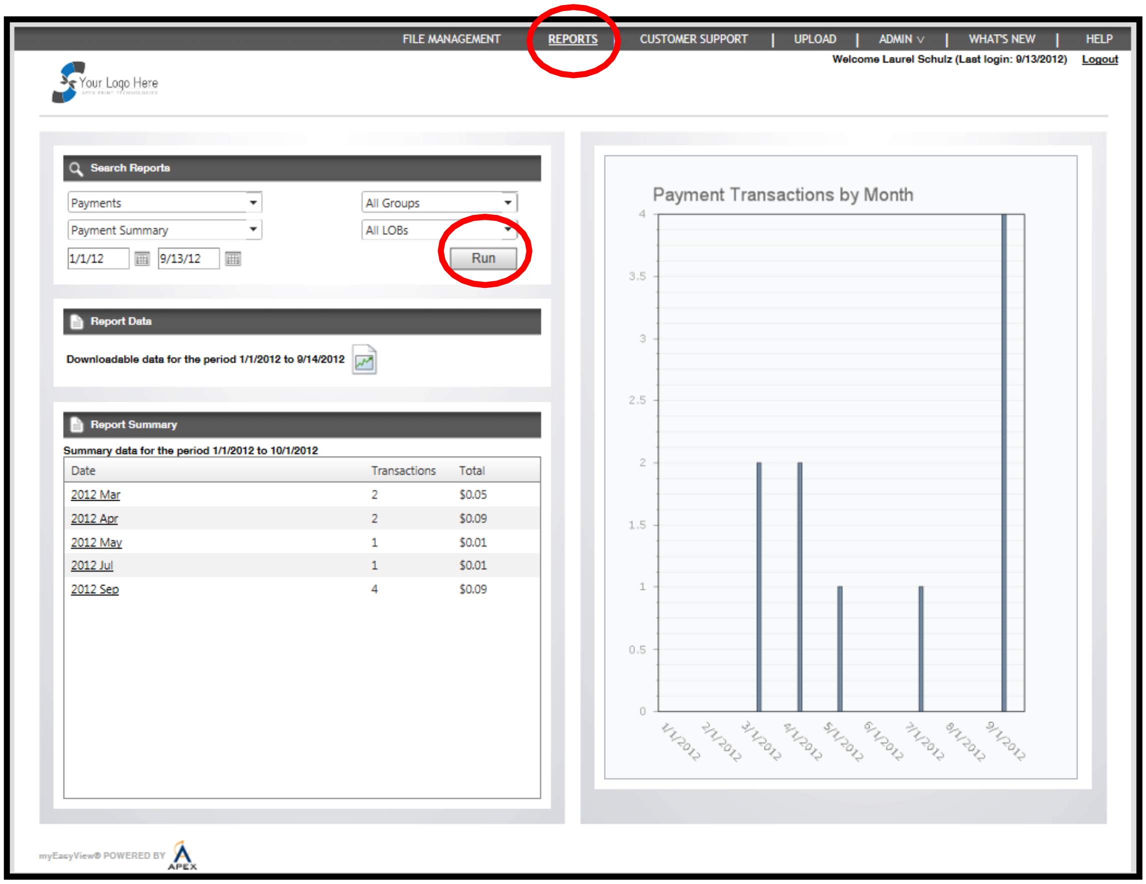
BALANCE DUE **$200.48**

Your Logo Here

IV. Reports Tab

View and download the following reports from the Reports tab:

- Address Processing Reports
- Payment Reports
- E-Statement Reports
- Print and Processing Reports
- Security Reports



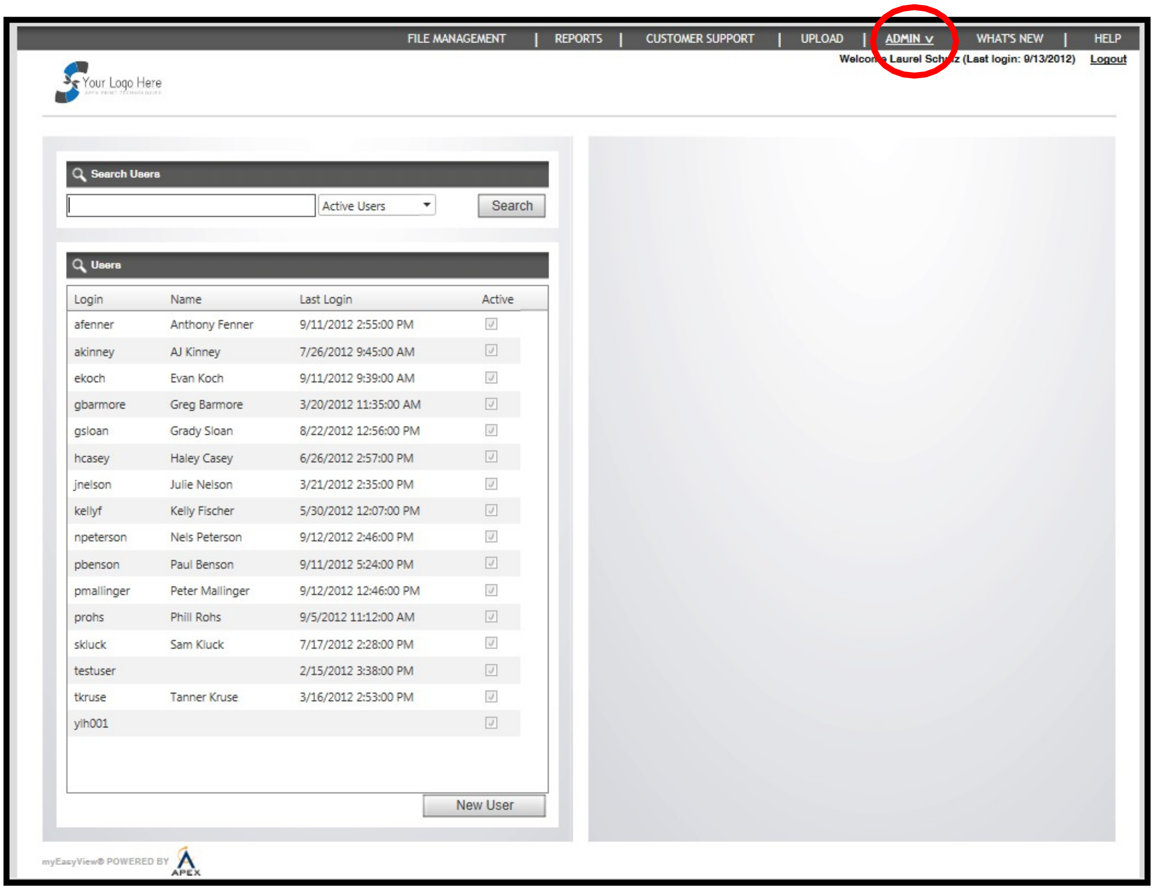
A. Search for reports

In the **Reports Tab** you can search for reports by category, subcategory, group, LOB or date:

1. Enter the search criteria for your report, and then click the **Run** button.
2. A list of reports that meet your search criteria will appear under the Report Data section on the left side of the screen. Reports can be exported to a CSV file for review.
3. If applicable, a monthly or daily report summary will appear on the bottom left side of the screen along with a graphical representation on the right side of the screen

V. Admin Tab

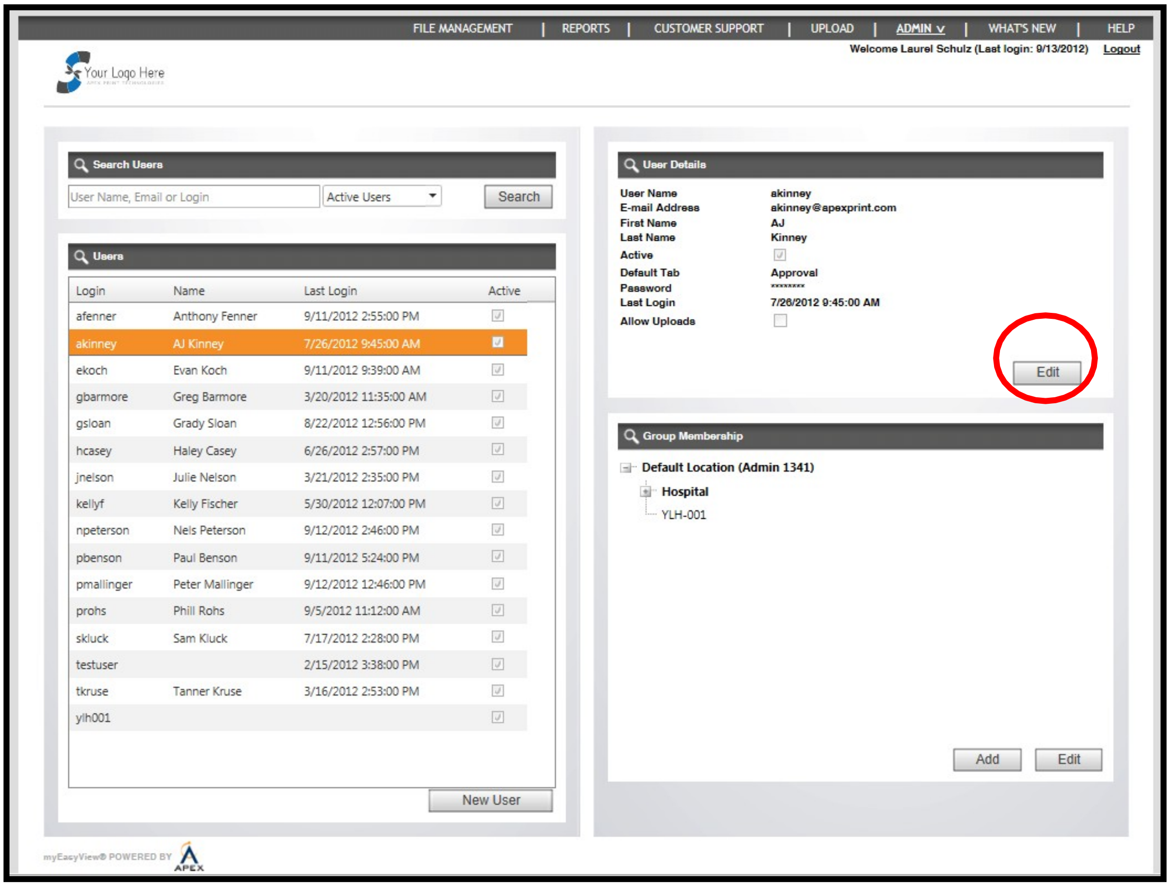
In the Admin tab, you can add groups, users, and managers; designate permissions; change passwords; and deactivate users.



A. Edit User

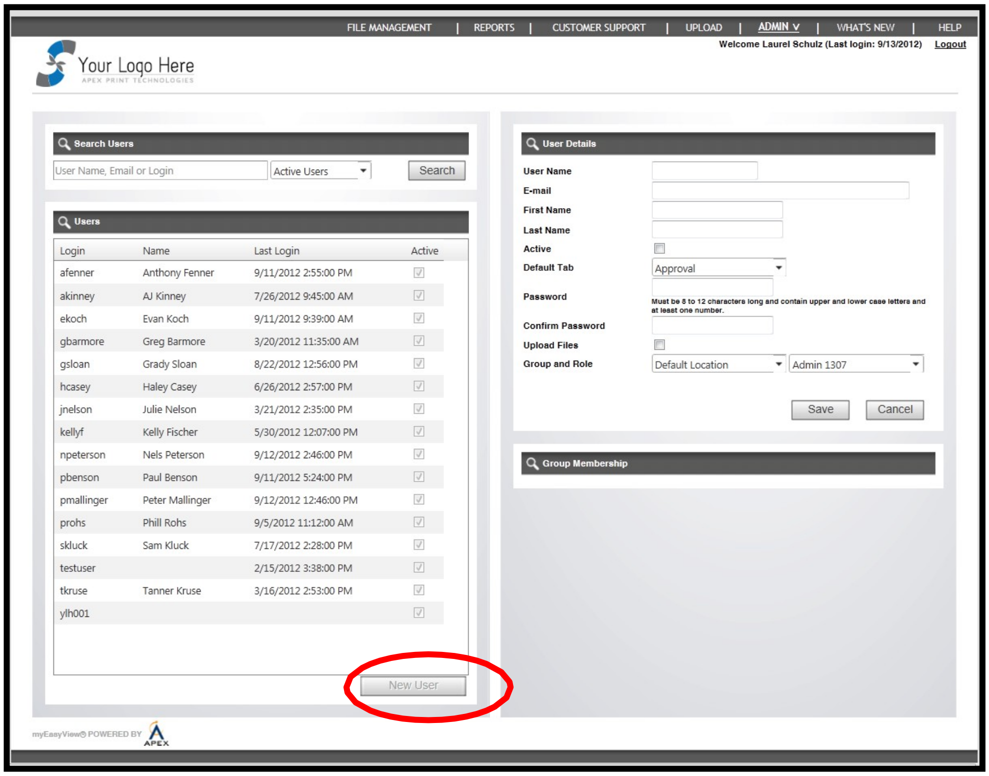
To edit a user, select the user and click the Edit button to change the following administrative access:

1. Account information
2. Role
3. Default tab
4. Capabilities
5. Password

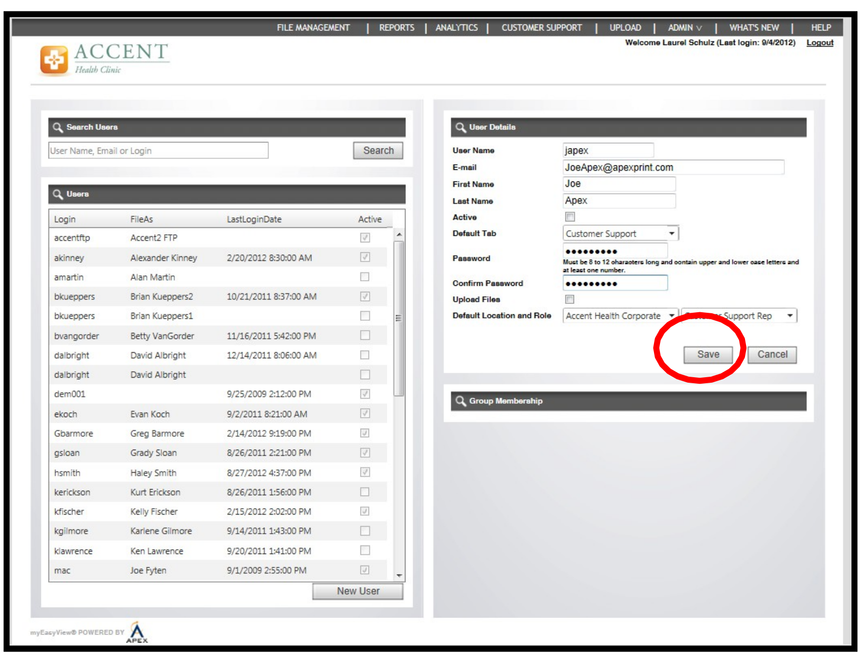


B. Add New User

1. To add a new user, click the New User button

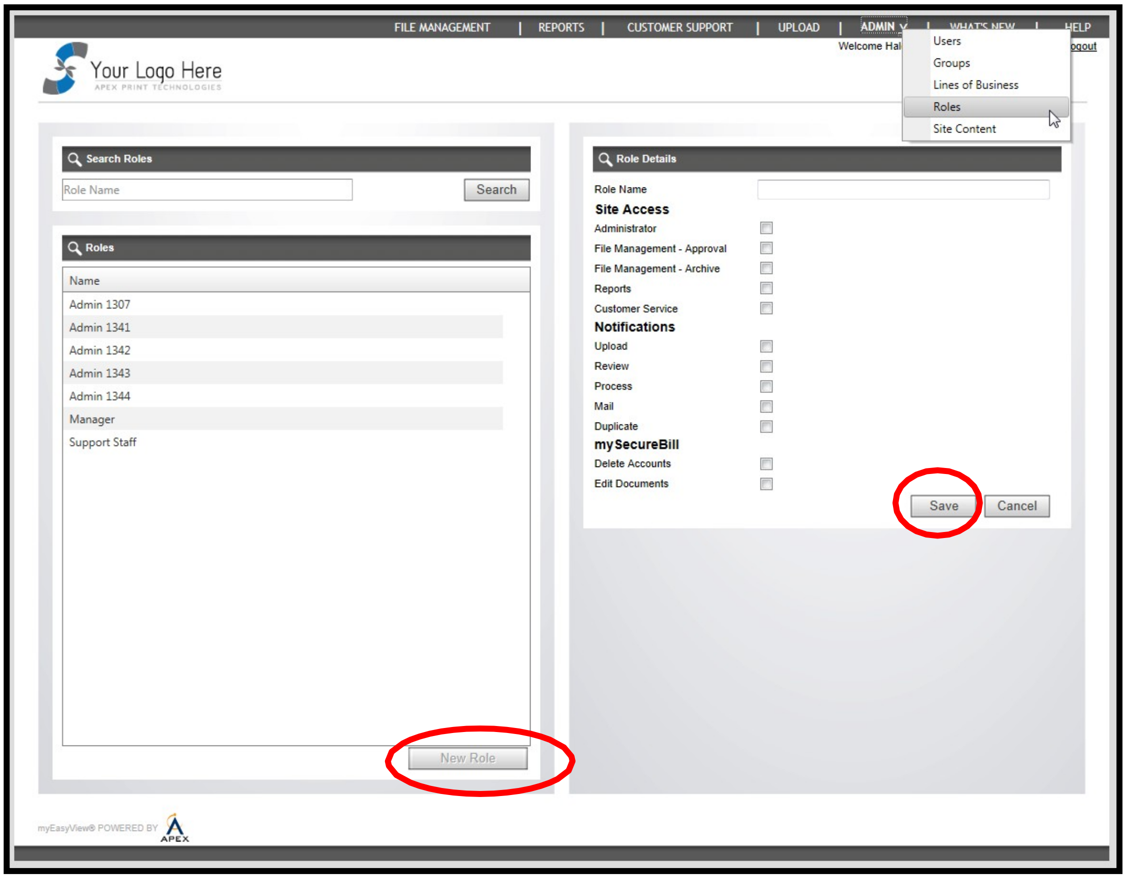


2. Fill in the user information and click Save



C. Create a new Administrative Role

1. Select **Roles** on the Admin drop-down menu
2. Select **New Role** button
3. Under "Role Details" add a role name and select the items you want accessible for the new user role
4. Click **Save**



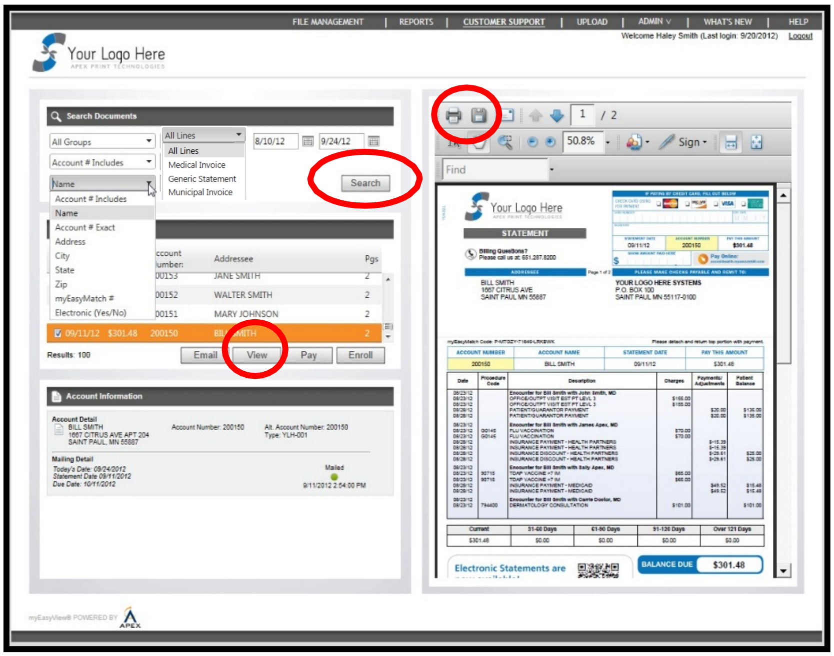
D. Edit an Administrative Role

1. Select **Roles** on the Admin drop-down menu
2. Select an existing role to edit
3. Under "Role Details", click the **Edit** button
4. Select the items you want accessible for the user role
5. Click **Update** to save

VI. Customer Support Tab

A. Search for statements across all archived files

1. Enter your search criteria (name, address, account #, myEasyMatch℠ code, name, group, LOB, and/or date) and click **Search**.
2. A list of statements will appear under the "Search Results".
3. A summary of Account Information will populate below the search results for each document that is selected.



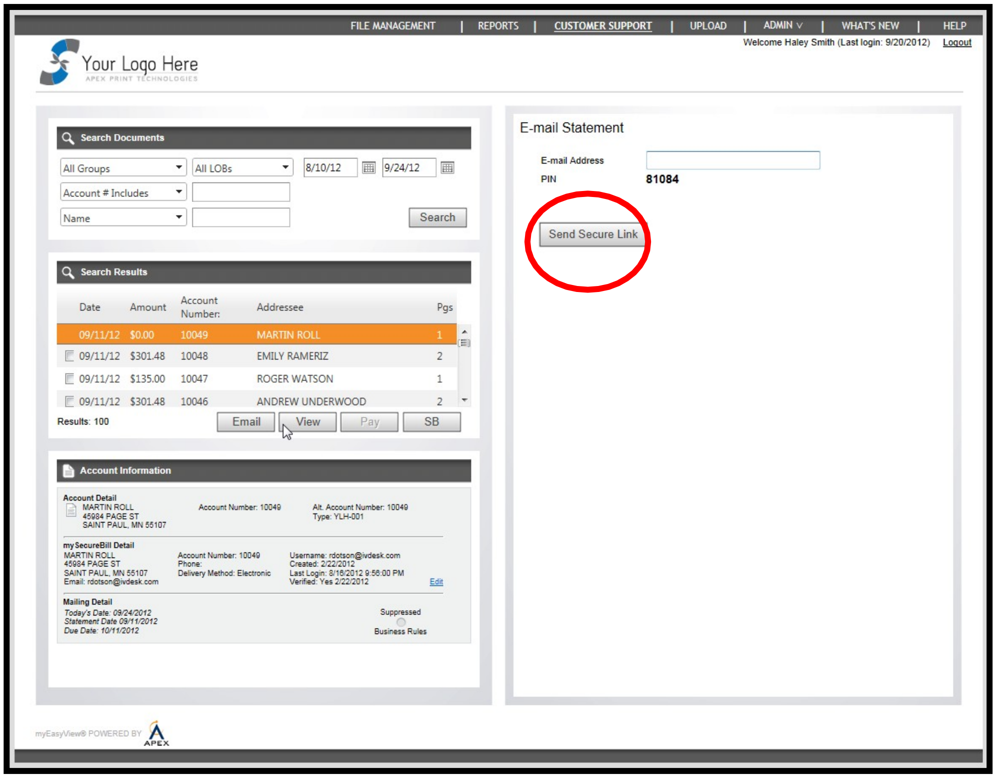
B. View statement PDFs

4. Complete your document search
5. Select the document you wish to view
6. The PDF associated with the selected document will automatically appear on the right side of the screen
7. From here you can **Print** or **Save** the image
   *If you leave the "view" screen, click **View** to get back to the document PDF

C. Email statements via secure link

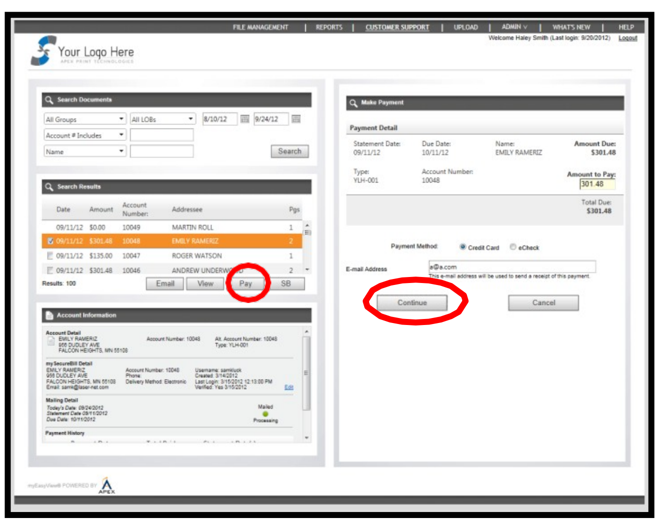
1. *Complete your document search*
2. *Select the document you wish to email*
3. *Click the Email button*
4. *Enter the email address of the individual requesting their document*
5. Relay the unique PIN # to the customer over the phone

6. Click **Send Secure Link** and the individual will immediately receive an email containing a secure link to their statement PDF (they will be directed to enter their unique PIN # to access their statement)

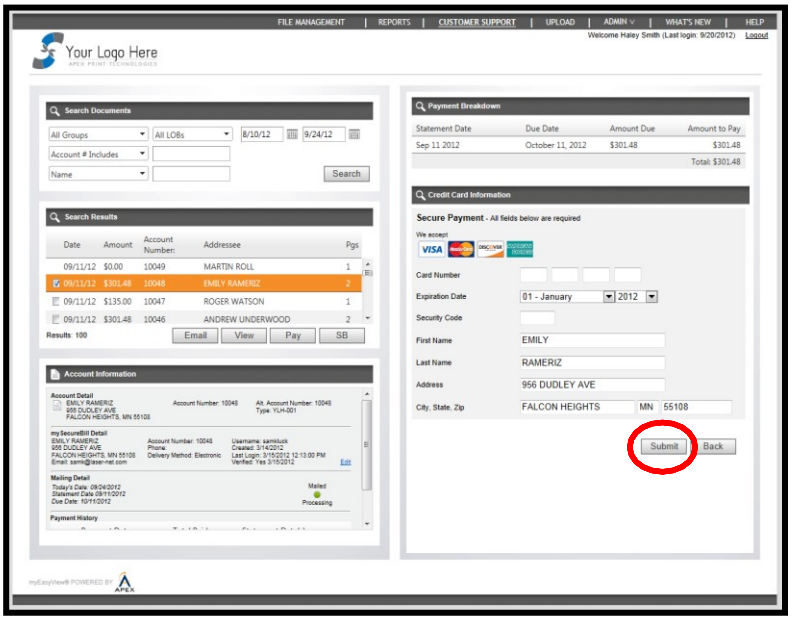


D. Take payment over the phone

1. Complete your document search
2. Select the document you wish to pay and click the **Pay** button
3. Add the dollar amount the individual wishes to pay
4. Enter the individual's email address and payment method (credit card or eCheck) click **Continue**



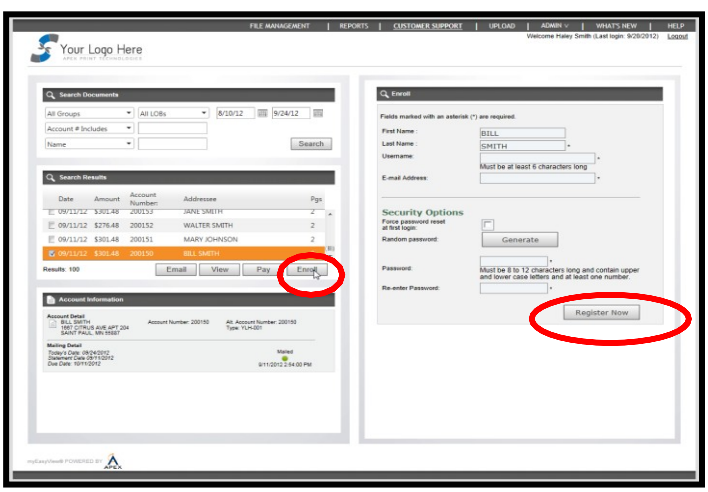
5. Enter the payment information and verify the credit card billing address, then click Submit



6. A screen will appear with a confirmation number, payment amount, patient name, and date of payment

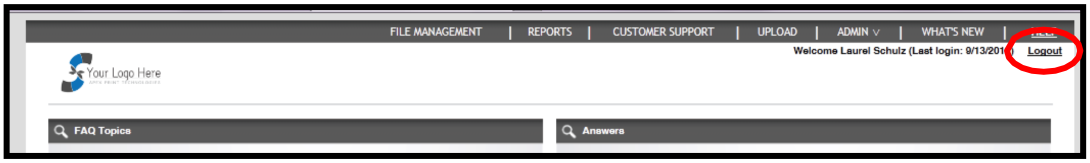
E. Enroll customers in mySecureBill® (e-statements)

1. Complete your document search
2. Select the document of the individual you wish to enroll
3. myEasyMatch™ code allows the individual's information to pre-populate
4. Click the **Enroll** button
5. Enter a username and email address for the individual
6. Generate a password, which the individual will be prompted to change upon their first login
7. Click **Register Now**, which will generate an email to the individual with an activation link they must click to confirm their registration for e-statements



VII. Logout

To log out of myEasyView®, click the Logout button in the menu bar.



VIII. Notification Emails

Below are examples of the possible email notifications you can elect to receive

A. Upload Confirmation

From: customerservice@apexprint.com [mailto:customerservice@apexprint.com]
Sent: Thursday, March 29, 2012 9:03 AM
To: Benjamin Mattson
Subject: Apex Upload Notification (CustomerXXX)

UPLOAD CONFIRMATION

3/29/2012 – File-Name01234567890,12345.txt.bak (987654)

3/29/2012 – File-Name-01234567890987 (963741)

3/29/2012 – File-Name-01234567890986 (963147)

Once the file has completed processing, you will receive a second confirmation detailing what has processed.

If you have any questions or comments about this upload, please contact us.

- Apex Support Staff

Phone : 651-287-8200
Fax : 651-287-8203
Email : customerservice@apexprint.com
Visit us on the web https://CustomerXXX.myeasyview.com

Thank you for allowing us to serve you!

B. Review Notification

From: customerservice@apexprint.com [mailto:customerservice@apexprint.com]
Sent: Thursday, March 29, 2012 9:03 AM
To: Benjamin Mattson
Subject: Apex Review Notification (Customer XXX)

REVIEW NOTIFICATION

3/29/2012 – File-Name 01234567890,12345.txt.bak (987654)

Date	File Name	Line Of Business	Total Documents	Total Amount	Suppressed Documents	Electronic
3/29/2012	File-Name01234567890_12345_987654.txt.bak	Customer XXX Statements	145	$0.00	15	30
3/29/2012	File-Name01234567890_12345_987654.txt.bak	Customer XXX Letters	79	$55,459.08	5	10

3/29/2012 – File-Name01234567890,12346.txt.bak (963741)

Date	File Name	Line Of Business	Total Documents	Total Amount	Suppressed Documents	Electronic
3/29/2012	File-Name01234567890_12346_963741.txt.bak	Customer XXX Statements	694	$3,947.49	5	28
3/29/2012	File-Name01234567890_12346_963741.txt.bak	Customer XXX Letters	259	$180,143.73	6	22

3/29/2012 – File-Name01234567890,12349.txt.bak (147369)

Date	File Name	Line Of Business	Total Documents	Total Amount	Suppressed Documents	Electronic
3/29/2012	File-Name01234567890_12349_147369.txt.bak	Customer XXX Statement	653	$923,508.05	12	33
3/29/2012	File-Name01234567890_12349_147369.txt.bak	Customer XXX Payment Arrangement	20	$1,656.68	1	5
3/29/2012	File-Name01234567890_12349_147369.txt.bak	Customer XXX Final	42	$49,119.66	1	6
3/29/2012	File-Name01234567890_12349_147369.txt.bak	Customer XXX Community Care Application	1	$0.00	0	0

You can review this job by visiting our web site at: https://CustomerXXX.myeasyview.com

PLEASE NOTE: THIS JOB WILL NOT PRINT AND MAIL UNTIL YOUR ORGANIZATION APPROVES IT

C. Process Confirmation

From: customerservice@apexprint.com [mailto:customerservice@apexprint.com]
Sent: Thursday, March 29, 2012 8:57 AM
To: Benjamin Mattson
Subject: Apex Process Notification (Customer XXX)

PROCESS CONFIRMATION

3/29/2012 – over123.out (987000)

Line Of Business	Documents	Amount	Approved	Suppressed	Electronic	Mailed	Pages	Singles	Multis
123 Overdue PC	136	$0.00	134	2	0	134	34	134	0
TOTALS	**136**	**$0.00**	**134**	**2**	**0**	**134**	**34**	**134**	**0**

SUPPRESSION DETAILS

Suppression Reason	Count
Address	2
Stricken	0
TOTAL	**2**

NCOA DETAILS

NCOA Code	Description	Count
02	Found COA: Moved Left No Address (MLNA)	2
A	COA Match	8
TOTAL		**10**

3/29/2012 - wout123.out (987002)

Line Of Business	Documents	Amount	Approved	Suppressed	Electronic	Mailed	Pages	Singles	Multis
123 Without Appt PC	61	$0.00	57	4	0	57	15	57	0
TOTALS	**61**	**$0.00**	**57**	**4**	**0**	**57**	**15**	**57**	**0**

SUPPRESSION DETAILS

Suppression Reason	Count
Address	4
Stricken	0
TOTAL	**4**

NCOA DETAILS

NCOA Code	Description	Count
02	Found COA: Moved Left No Address (MLNA)	1
91	COA Match: Secondary Number Dropped from COA	1
A	COA Match	3
TOTAL		**5**

3/29/2012 – Over321.out.txt (987004)

Line Of Business	Documents	Amount	Approved	Suppressed	Electronic	Mailed	Pages	Singles	Multis
321 Over Due PC	11	$0.00	11	0	0	11	3	11	0
TOTALS	**11**	**$0.00**	**11**	**0**	**0**	**11**	**3**	**11**	**0**

SUPPRESSION DETAILS

NCOA DETAILS

NCOA Code	Description	Count
TOTAL		**0**

For more detail, please log in to https://CustomerXXX.myeasyview.com.

Thank you for using Apex Print Technologies!

D. Mailed Notification

From: customerservice@apexprint.com [mailto:customerservice@apexprint.com]
Sent: Monday, April 09, 2012 8:56 AM
To: Kelly Fischer
Subject: Apex Mail Notification (CustomerXXX)

MAILED CONFIRMATION

Received Date	Mailed Date	File Name	Line Of Business	Print File	Total Documents	Total Pages
4/8/2012	4/9/2012	File_Name_12345678_123456.txt	Customer Non-Payment Plan Stmt w/Financial Aid App	CustomerXXX.123444.LPF001.PS	1	1
4/8/2012	4/9/2012	File_Name_12345678_123456.txt	Customer Non-Payment Plan Stmt	CustomerXXX.123400.LPF001.PS	1	1
4/8/2012	4/9/2012	File_Name_12345678_123456.txt	Customer Non-Payment Plan Stmt	CustomerXXX.123400.LPN001.PS	1	1

For more detail, please log in to https://Customer.myeasyview.com.

Thank you for using Apex Print Technologies!