PCH Global User Manual

Version 1.1

ABSTRACT

Exela's PCH Global is a powerful digital exchange platform for the insurance industry that provides a single point of access for claims management, correspondence, and payments. Through digitization, automation, and system integration, PCH Global provides a cost-effective claims processing solution that improves processing accuracy and transparency, while accelerating cycle times.

PREPARED BY:

exela
TECHNOLOGIES

Revision History

Sr. No.	Name	Date	Revision Description	Version
1.	Yogesh, Tendulkar	11-02-2022	Prepared a new user manual for PCH Global	1.0
2.	Padmini Vheejay	01-19-2024	Update user manual for PCH Global	1.1

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2. About PCH Global

2.1. Providers

PCH Global provides a claims revenue cycle solution that is capable of handling multiple payers, improves first pass accuracy across all payers, provides visibility and tracking of claim status, and provides digital collaboration with payers to accelerate cycle times and reduce Days Sales Outstanding (DSO).

2.2. Payers

The PCH Global web portal is backed with key features required by any insurance industry vertical to get their service in one stop. Some of the business processes in which PCH Global serves end-to-end across the verticals are claims processing, payment processing, revenue integrity, etc., PCH Global connects insurers, providers, the members in their business processes and enables collaboration between them for seamless claims processing lifecycle. PCH Global streamlines the healthcare claims process by placing all participants in the sequence on a common platform.

2.3. Scope of the Document

This is a User Manual – Quick Reference Guide for the PCH Global application. It contains a brief description of the application, its functions, capabilities, and step-by-step procedures for using it.

End Users

- Healthcare providers and healthcare systems
- Billing service organization including revenue integrity service providers and reclamation vendors.

3. Getting Started

3.1. Pre-requisites

The user will need the following to access the PCH Global application:

- Application access link: URL: https://americas.pch.global/PCHGlobal/website/Signin.aspx &

  https://pchhealth.global/

- Internet Browser: Google Chrome, Internet Explorer, Mozilla Firefox, Safari

- Working internet connection.

- Log-in Credentials.

3.2. Registration

The Prospective User to Access PCH Global application has to register First time through PCH Global Microsite using the URL: https://pchhealth.global/

The Prospective User is provided with two options for registration:

- Direct Registration

- Google Sign in

The user who has been created via microsite registration or google sign in option would be considered an **Account Administrator and would have the role of Super Admin User**. They would be able to create sub user(s) up to the maximum number of registered plan users included in the Plan subscribed.

3.2.1. Direct Registration

URL: https://pchhealth.global/

- Click on the Sign Up button, the below registration page will be displayed:
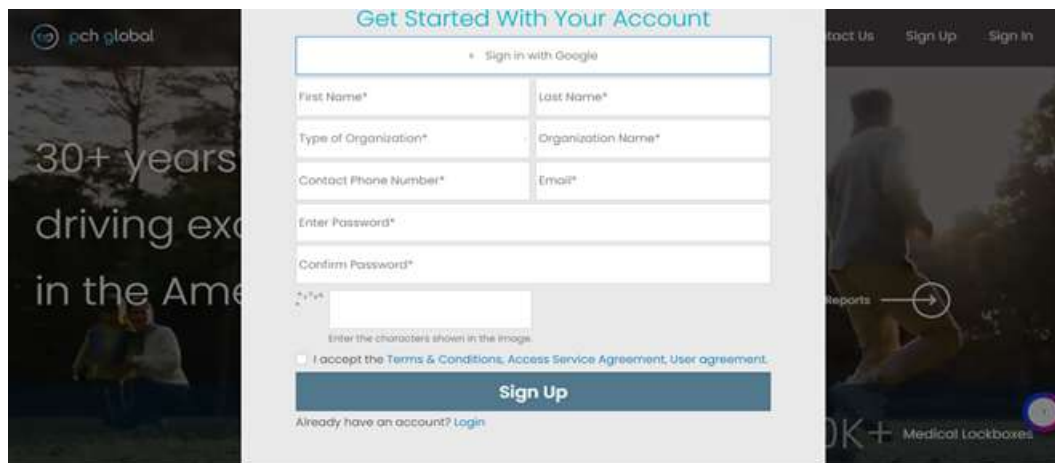

Figure 1: Get Started Registration Page

The user also can click on Pricing tab to review the plan pricing, select the required plan and get started.

In the Microsite Registration Section, enter the details in the respective fields as follows:

- Enter the First Name in the '**First Name**' field

- Enter the Last Name in the '**Last Name**' field

- Select the relevant **'Type of Organization'** from the drop down list (Provider, Billing Services)

- Enter the Organization Name in the **'Organization Name'** field

Type of Organization*
Type of Organization*
Provider
RCM Service Partner

- Enter the Contact Phone Number in the '**Contact Phone Number'** field

- Enter the appropriate **'Email'** in the Email ID field

- Enter the appropriate password in the **'Enter Password'** and **'Confirm Password'** field

Note: Password should have at least one uppercase, one lowercase, one numeric, and one special character $@! %*#? With minimum 8 characters & maximum 16 characters

- Check the '**I accept'** checkbox after reviewing the Terms & Conditions, Access Service agreement, and User Agreement.

- Click on the 👁 icon to view the password(s)

- Enter the correct CAPTCHA

Note: All fields marked with an asterisk (*) are mandatory.

- After entering the required data, click on the **SIGN UP** button to register.

Note: When registering for a new account, message '**Email ID Already registered'** will appear in case the Prospective User has an account in the system (PCH Global Portal) with the same Email address (Email ID). The user either needs to use an alternate email address to get registered if required or login in to PCH Global portal by clicking **'Customer Sign In'** with the Email ID already registered.

- After successful completion, the below message and a confirmation email with a link to activate the account is sent to the User Registered Email ID.

The user has to open the registered email account and find the email with the subject, **'Exela PCH Global Email Confirmation'** as shown below:
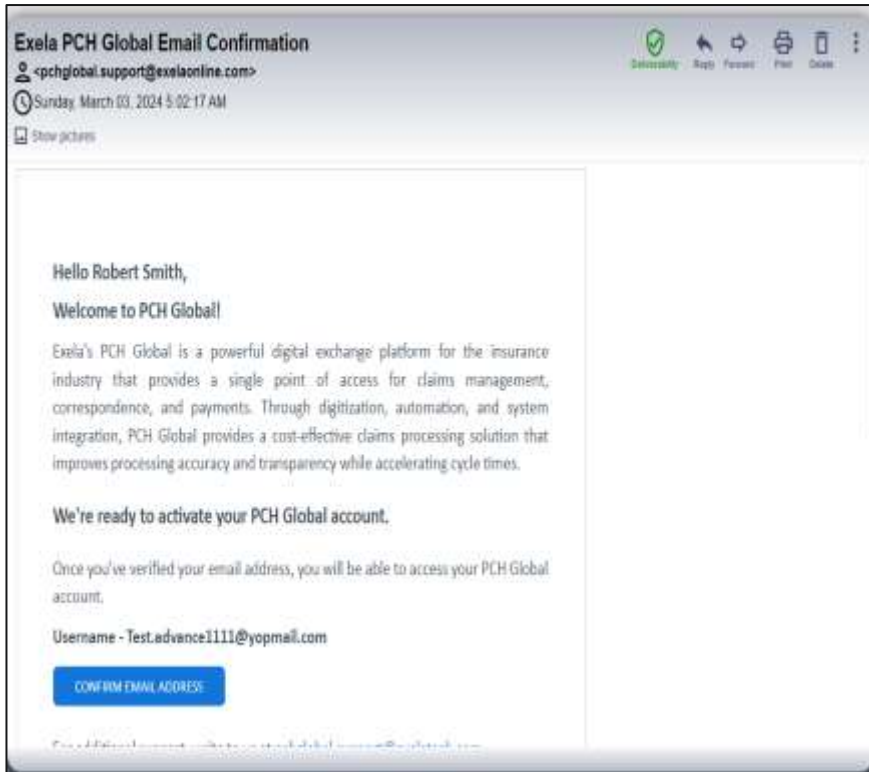
3

Figure 2: Account Email Confirmation Page

In the body of the email, user has to click on the **'CONFIRM EMAIL ADDRESS'** button. Once the email is confirmed the user can see the below message:

Figure 3: Account Email Verification Page

Note: If the user wants to log in from the Account Email Verification page, click on the button.

The User who registers through the microsite using the above process would be considered as the Account Administrator and would have a role of Super Admin User.

3.2.2. Google Sign in

URL: https://pchhealth.global/

- Click on the button in the microsite page (ref to Figure 1: Get Started Registration Page)

- Click on the button to sign in with google Email ID.

- Below page will be displayed:
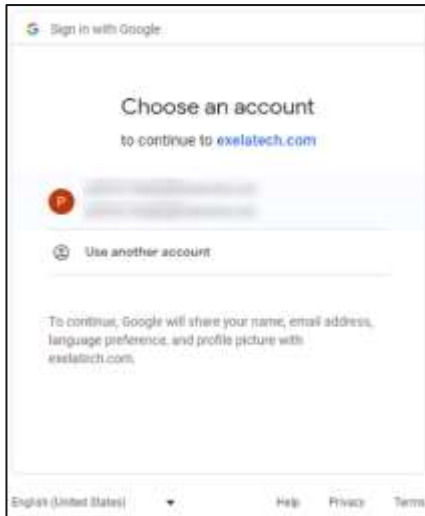
Figure 4: Customer Sign In – Google Sign in – Selection of Account

Figure 5: Customer Sign In – Google Sign in – Addition of an Account

Here the user needs to select the account through which they want to sign in or add the required Gmail account if the required mail account is not present. The user needs to provide the registered google email address or phone number and password to add the Gmail account and there after use the account to sign in the PCH Global application.

Note: 'Remember Password' can be enabled through Google Chrome. The application does not store passwords.

- The user would be redirected to the below login page:
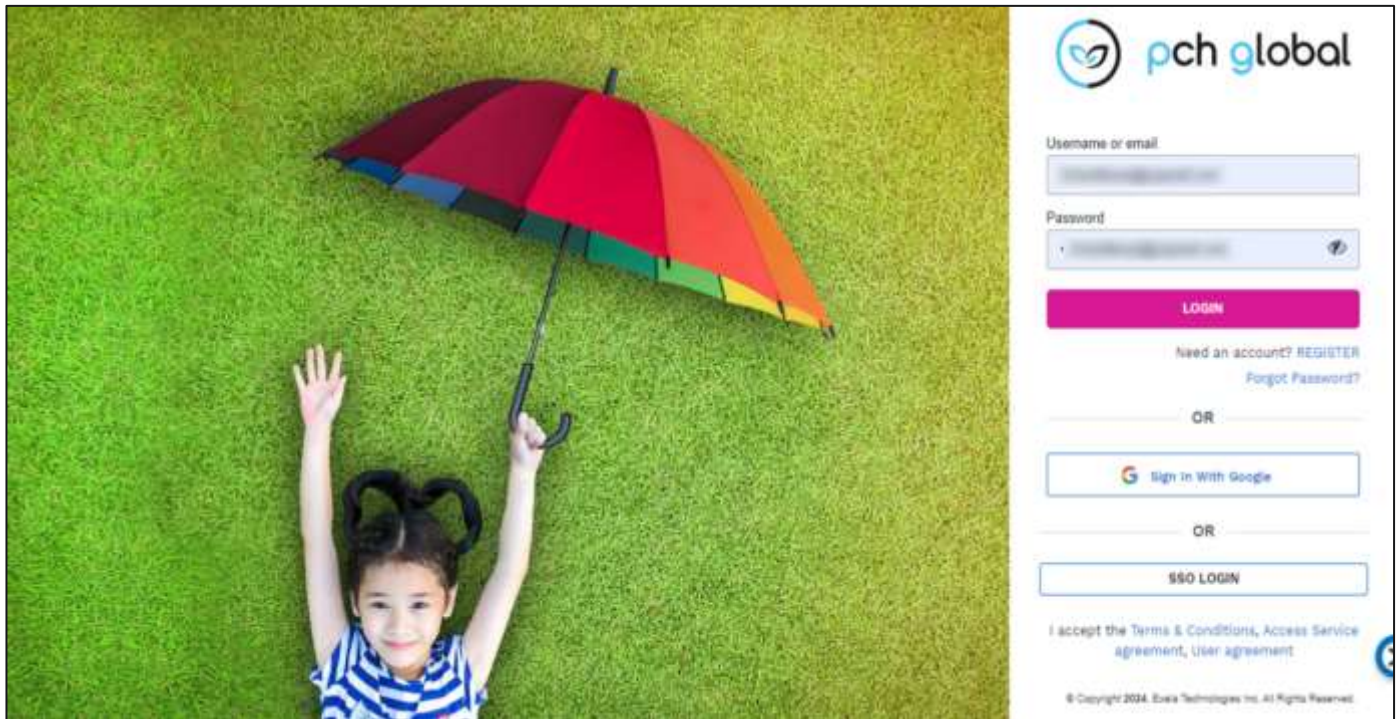
Figure 6: Google Sign in Page
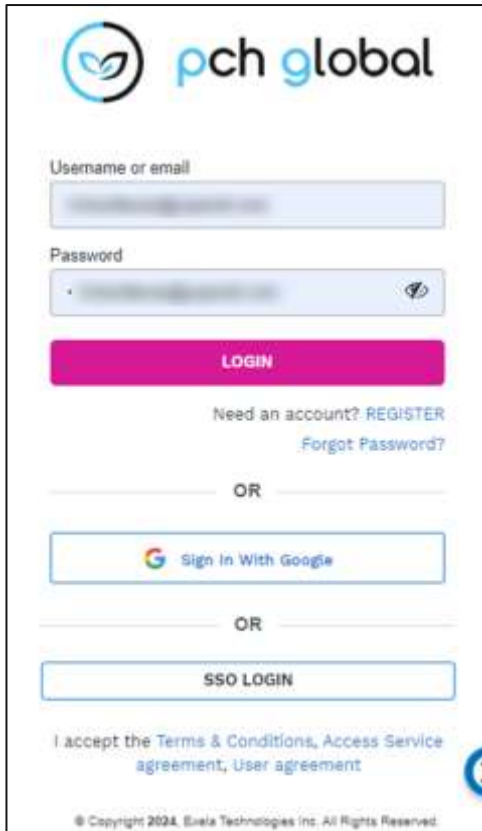
Note: The user signing in first time with the google email id using option **'Sign in With Google'** would be considered as the Account Administrator and would have the role of Super Admin User.

4.   Logging-in

PCH Global can be accessed by Users either by:

- Clicking the Sign In button from the Microsite Page Or

- Through accessing the URL: https://americas.pch.global/PCHGlobal/website/Signin.aspx

This would enable Users to access the below login page:

Figure 6: Sign in page

4.1. Logging in using the User Credentials

- Enter the registered email address (Email ID)/User ID in 'Username' field
- Enter the valid password in the 'Password' field
- To view or hide the password on the Sign In page, click on the ⊚ icon
- Click on the LOGIN button to log in to the application.

Note: All fields marked with an asterisk (*) are mandatory.

4.2.   Logging in using Gmail Account

- Click on the [Sign In With Google] button to sign in with the google Email ID.

5.   My Account Setup (Available for Super Admin Only)

On successful google sign in or after microsite registration the Super Admin User alone will be directed to My Account Set up module for a one-time setup to Choose a Plan, Apply Coupon code (if any), Enter the Subscriber Information and make the payment for the Plan selected. Once initial subscription is confirmed, the Super Admin User would not be able to access this module. Any modification to the data provided except for subscriber Federal Tax ID can be done via My Profile.

The Promo Code users: Once the promo code is applied by the User, respective Sponsored Plan is automatically selected by the system and the user would be able to access the Subscriber Information and Confirmation pages.

The Non Promo Code User: Would be able to select the required plan and access the Subscriber Information, Payment Details and Confirmation Pages.

My Account Setup is divided into five sections **'Plan Options'**, **'Subscriber Information', 'Payment Details' and 'Confirmation'.**

5.1.   My Account Setup – How did you hear about PCH Global (Available for Super Admin Only)

The user would be able to see the below screen in the Account set up page
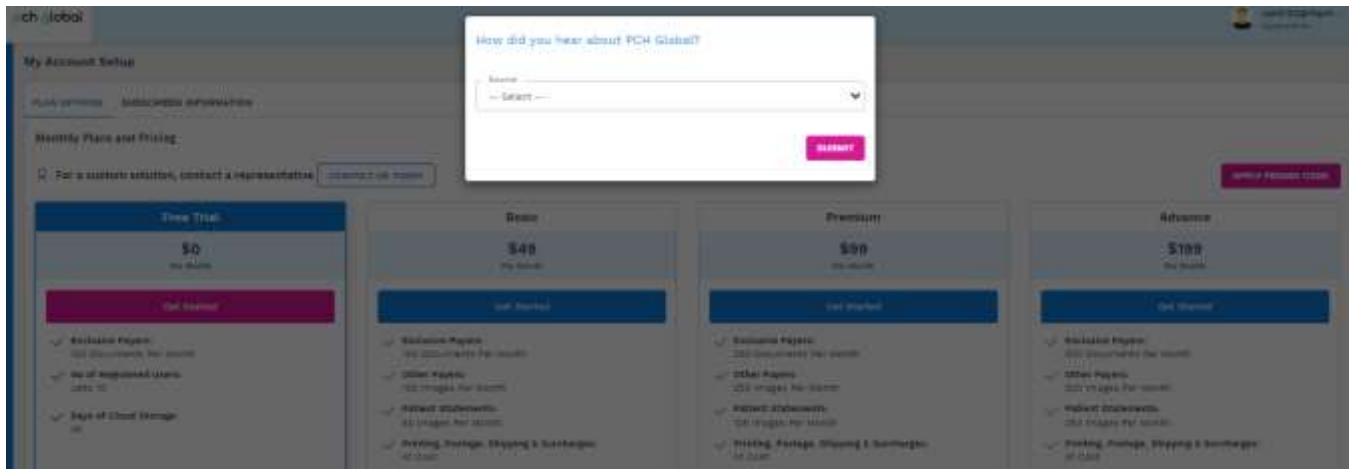
Figure 7: User Reference Source

- Select the source from the drop down list as follows

Parameter	Comments
Source	Advertising Email Event/Appearance Google search **Payer (select the payer name)** Social Media Word of Mouth/Referral Other (to provide the other source name)

5.2. My Account Setup – Plan Options Apply Promo Code (Available for Super Admin Only)

- Once the source is selected then the below screen would be displayed:
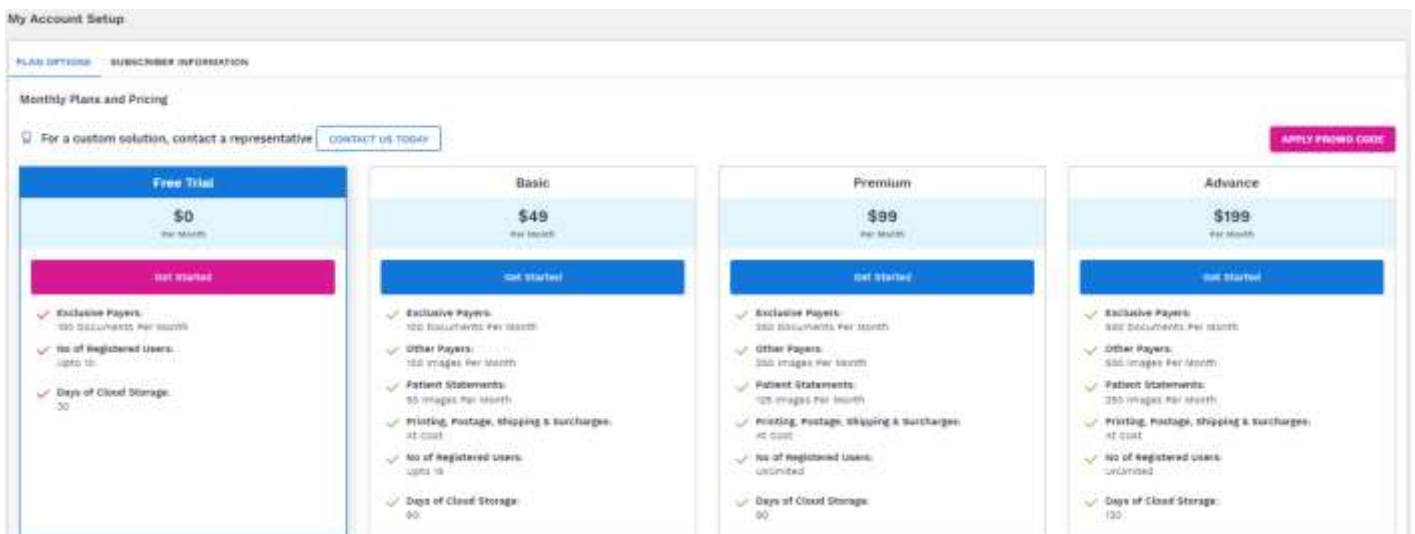
For Sponsored Plan Users

- Click on the APPLY PROMO CODE button, following popup window will be displayed

Figure 8: My Account Setup - Promo Code Pop up Page

- If the User has the Promo Code, they can enter the Promo Code in the '**Enter Promo Code'** field

- Click on the **APPLY** button, the User would be able to view Promo Code Pop up Page as below:

Note: Promo Code is case sensitive, hence it needs to be entered exactly as provided.

- Click on the **CONTINUE** button. The User would be then directed to the Subscriber Information Page. Once the Promo Code is applied the system selects the Sponsored Plan automatically.

- If the User applies the Promo Code and click on the **CANCEL** button, the User would be then directed to Plan Options Page.

- If the User does not have the Promo Code, then click on the **CANCEL** button to proceed further to Plan Options Page.

- Once the Promo Code is applied and the user has clicked **CONTINUE** the Sponsored Plan selected by the system cannot be changed.

Note: The user can use **CANCEL** or **✖** button to come out of the pop up screen.

Promo Code can be applied at any time prior to making the payment.

5.3. My Account Setup - Plan Options (Available for Super Admin Only)

If the users do not have a Promo Code, then select the required plan using the below screen. The plan details – pricing, features & functions can be reviewed in this page.

My Account Setup

PLAN OPTIONS   SUBSCRIBER INFORMATION

Monthly Plans and Pricing

For a custom solution, contact a representative   CONTACT US TODAY

APPLY PROMO CODE

Free Trial	Basic	Premium	Advance
$0 Per Month	**$49** Per Month	**$99** Per Month	**$199** Per Month
Get Started	Get Started	Get Started	Get Started

Free Trial
- Exclusive Payers: 100 Documents Per Month
- No of Registered Users: Upto 10
- Days of Cloud Storage: 30

Basic
- Exclusive Payers: 100 Documents Per Month
- Other Payers: 100 Images Per Month
- Patient Statements: 50 Images Per Month
- Printing, Postage, Shipping & Surcharges: At Cost
- No of Registered Users: Upto 15
- Days of Cloud Storage: 90

Premium
- Exclusive Payers: 150 Documents Per Month
- Other Payers: 150 Images Per Month
- Patient Statements: 125 Images Per Month
- Printing, Postage, Shipping & Surcharges: At Cost
- No of Registered Users: Unlimited
- Days of Cloud Storage: 90

Advance
- Exclusive Payers: 500 Documents Per Month
- Other Payers: 500 Images Per Month
- Patient Statements: 250 Images Per Month
- Printing, Postage, Shipping & Surcharges: At Cost
- No of Registered Users: Unlimited
- Days of Cloud Storage: 120

Exela PCH Global – Digital Claims Gateway Plans at a Glance

Plans	Free Trial	Basic	Premium	Advance
Base User Subscription Fee	$0 (30 Days-Free Trial)	$49 per month **	$99 per month **	$199 per month **
Transactions Per Month Exclusive Payer	up to 100 documents for evaluation within first 30 days from subscription	100 documents per month	150 documents per month	500 documents per month
Transactions Per Month Other Payer	not Available	100 images per month	150 images per month	500 images per month
Transactions Per Month Patient Statements	not Available	50 images per month	125 images per month	250 images per month
Printing, Postage, Shipping & Surcharges	Not Available	At Cost *	At Cost *	At Cost *
Number of Registered Users	Upto 10	Upto 15	Unlimited	Unlimited

Additional Features & Fees

Exclusive Payer Submission Transactions (Non-Expiring)	Not Available	$50 for 125 Documents *	$50 for 125 Documents *	$50 for 125 Documents *
Other Payer Submission Transactions (non-Expiring)	not Available	$50 for 1,000 images *	$50 for 1,000 images *	$50 for 1,000 images *
Patient Statements Transactions (Non-Expiring)	not Available	$10 for 200 images *	$10 for 200 images *	$10 for 200 images *

Base Model Functionality

Payer Network	Exclusive Payers Only	Both Exclusive and Other Payers	Both Exclusive and Other Payers	Both Exclusive and Other Payers
Transaction Types Allowed *	Appeal, Claim & Correspondence	Appeal, Claim & Correspondence	Appeal, Claim & Correspondence	Appeal, Claim & Correspondence
Transaction Methods	Image Upload, Direct Entry	Image Upload, Direct Entry	Image Upload, Direct Entry	Image Upload, Direct Entry
File Types Allowed	JPG, PDF, TIFF, PNG	JPG, PDF, TIFF, PNG	JPG, PDF, TIFF, PNG	JPG, PDF, TIFF, PNG
Claim Resubmission	Not Available	Not Available	Yes (Exclusive Payers only, Claims submitted up to 60 days earlier)	Yes (Exclusive Payers only, Claims submitted up to 120 days earlier)
Prior Authorization	Available	Available	Available	Available
Overnight and Trackable Delivery	Not Available	Available	Available	Available
Days in Cloud Storage	30	90	90	120
Security & Compliance	Available	Available	Available	Available
Report & Analytics	Available	Available	Available	Available
433 Payer	Not Available	Available	Available	Available

* Per Month
Monthly Billing Cycle 30 Days.

* Claim to include but not limited to:
Professional, Institutional & Dental Claims, Primary / Secondary/ Tertiary Claims with BOB/EOMB, Corrected Claims, Resubmission Claims, Member Claims, Roster Claims and Vaccination Claims.

Other Attachment include but not limited to:
Copy of ID Card, Copy of Medicare Card, Date of Injury, Invoice, Itemized Bill, Pre-Certification/Authorization Information, Referral, W9, Cost Containment-Overpayment/Refund/COB & Hospice, Provider Information Change Form, DME Review

* Tax may be applicable

Figure 9: My Account Setup - Plan Options Page

Through this page the user would be able to select the Plan and apply Promo Code. They can also use the **"Contact Us Today"** option for a custom solution.

5.3.1. Contact Us Today (Available for Super Admin Only)

Contact Us can be used, if the user needs any additional information or assistance.
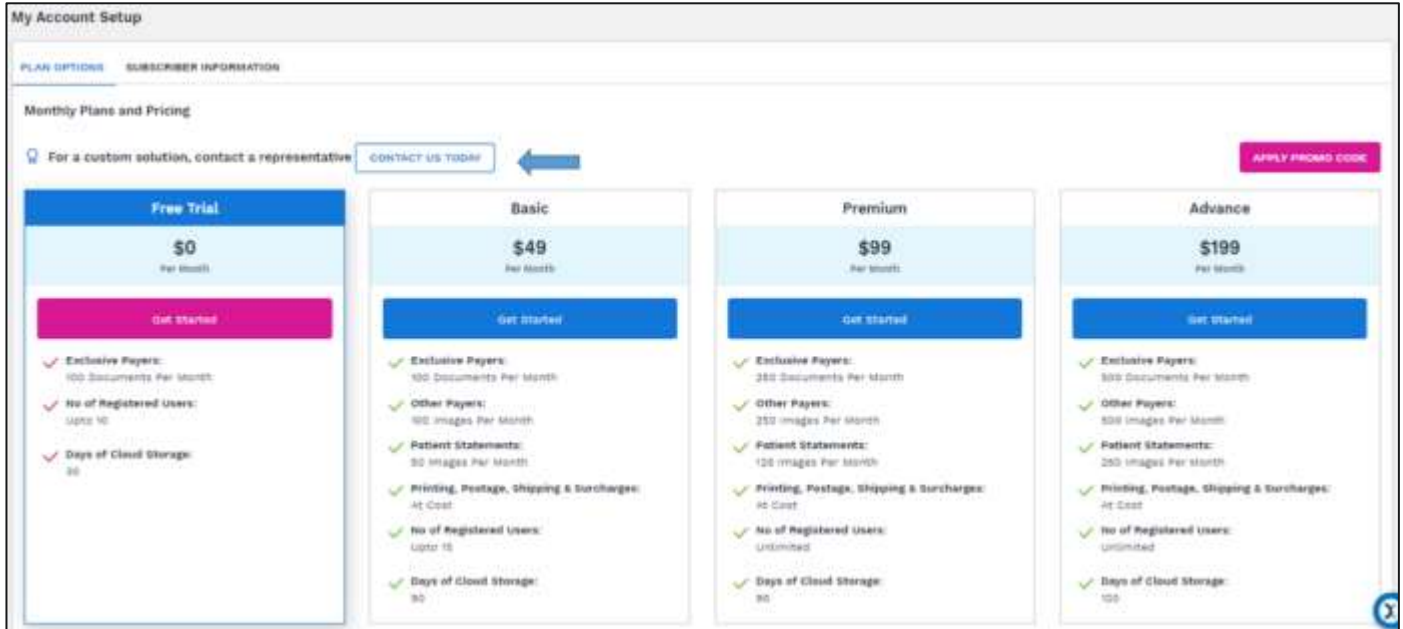
Figure 4: Contact US Today

- Click on the CONTACT US TODAY button the below Pop up Page will be displayed:

- **'Name', 'Email ID', 'Contact Phone Number'** (if available) gets auto populated. If the '**Contact Phone Number'** is blank the User has to enter the Phone Number as this a required field
- The User has to provide the Inquiry Message in the **'Message'** field

- Click on the [CANCEL] button to go back to the previous page if required otherwise

- Click on [SUBMIT] to send the message. The user would also get an email in their registered Email ID with subject '**Inquiry for the PCH Global Products/Services**'.

Note: All fields marked with an asterisk (*) are mandatory.

- Once the inquiry is submitted, User would be able to see the below message:

Thanks.!

Thanks for your interest in our products. We will be in touch shortly.

[OK]
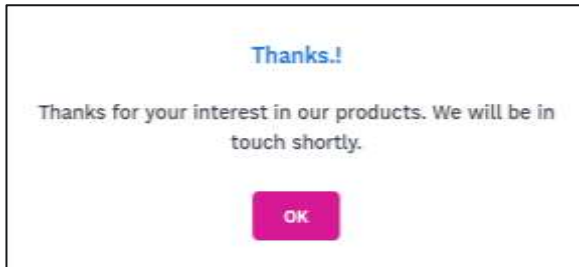
Note: The user can use [CANCEL] or ✖ button to come out of the Contact Us pop up screen.

5.3.2. Plan Selection (Available for Super Admin Only)

Plan Option pages enables the User to view all the plans currently available for selection along with the pricing, features, and functions. If the plan was selected during microsite registration, the selected plan would be highlighted here. However, the User can change/choose the plan of choice by clicking '**Get Started**'. Once the User clicks the get started, then the User would be directed to the Subscriber Information Page.

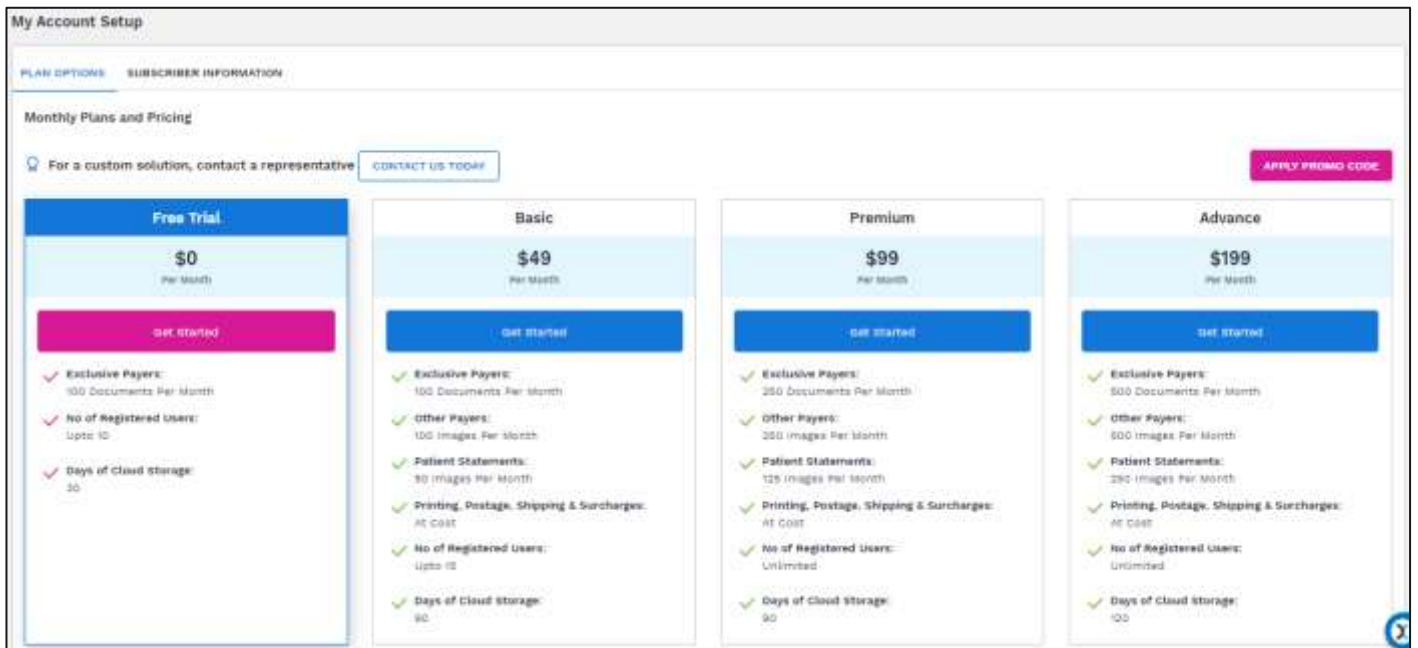**Note:** These fee rates are subject to change.

Figure 5: My Account Setup - Plan Options - Plan Selection

- Sources Parameter Have Drop down list and the user has to select the appropriate option to filter, if required.

Parameter	Comments	Privilege
Free Trial	Exclusive Payers No of Register users Days Of cloud Storage	100 Document per Month Upto 10 Users 30 Days
Basic	Exclusive Payers Other Payers Patient Statement Printing, Postage, Shipping & Surcharges No of Registered users Days Of cloud Storage	100 Document per Month 100 images per Month 50 images per Month At Cost Upto 15 Users 90 Days
Premium	Exclusive Payers Other Payers Patient Statement Printing, Postage, Shipping & Surcharges No of Register users Days Of cloud Storage	250 Document per Month 250 images per Month 125 images per Month At Cost Unlimited Users 90 Days
Advance	Exclusive Payers Other Payers Patient Statement Printing, Postage, Shipping & Surcharges No of register users Days of cloud storage	500 Document per Month 500 images per Month 500 images per Month At Cost Unlimited Users 120 Days

Note:

- **Exclusive Payer**: Digital Delivery of submitted documents to the respective payers.
- **Other Payer:** Print and Mail Delivery of submitted documents to the respective payers.

5.4. My Account Setup - Subscriber Information (Available for Super Admin Only)

- Click on the **SUBSCRIBER INFORMATION** sub-tab the below page will be displayed:

Figure 6: Subscription Information page

- Select the plan and click on the **Get Started** button following on required plan and **'Plan Subscriber Information'** page will appear as follows:

*Figure 7: My Account Setup – Plan Subscriber Information Page*

Here the User needs to provide the information of the entity which is subscribing the plan. This information would be used for generating the invoice. The taxes would be charged based on the state mentioned in **'Subscriber State'** for services requiring payment of taxes.

To Update the Plan Subscriber Information

- Select the **'Type of Organization'** from the drop down list:

- Enter the **'Subscriber Name'** field

- Enter the **'Subscriber FED Tax ID'** field

- Enter the **'Subscriber Address1'** field

- Enter the **'Subscriber Address 2'** field

- Enter the **'Subscriber City'** field

- Select the **'Subscriber State'** from the drop down list

- If required Zip or Zip including Zip Plus can be entered in **'Subscriber Zip'** field

- Enter the **'Subscriber Phone Number'** field

- Enter the **'Subscriber Fax Number'** field

- Select the **'Serving Provider Type'** from the drop down list. One or More service type can be selected based on Billing Provider specialty:
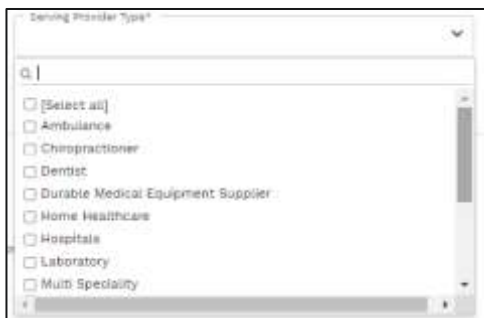
Note: On the Subscriber Information Page User can only view Super Admin Email ID in **'Email ID'** field.

- Click on the ☑ Plan Subscriber information and Mailing information are same check box if the Subscriber and the Mailing information is same. This action would auto populate the updated Name, Address, City, State, Zip and Phone number in Mailing information section when the document is submitted to other Payer in the Document Submission Module and Mailing Information section of the Subscriber Information under My Profile Module. If the check box is not clicked, the mailing information section would not be auto populated.

Note: All fields marked with an asterisk (*) are mandatory.

- Click on the CANCEL button to go back to the previous page if required otherwise

- Click on the **CONTINUE** button to save the changes. The system would save only if the address is valid, there is no mismatch of the address with USPS database, and all the required fields have been updated.

- **Address Mismatch:** Once the user click on the **CONTINUE** button the system validates the Subscriber address. If there is any recommendation the below Pop Up screen will be displayed. The User can click on **'Edit'** to make the changes or click on **'Update'** button to go with the system recommended changes. This Update action would apply the recommended address changes automatically in the related address fields (address1, address 2, city, state, zip code).

Do you wish to update or edit the Subscriber
Information address below?
Address:**2701 E GRAUWYLER RD**
Address:
City:**IRVING**
State:**TX**
Zip:**75061-3414**

EDIT   UPDATE

- **Address not Found if** the Subscriber address is not valid the below alert message will be displayed. The User need to correct the address to continue further.

Address Not Found.

OK

Note: User with promo code or Free Trial will be able to access **'Subscriber Information'** and **'Confirmation'** tabs alone as per the below screen. The user has to fill in only the Subscriber Fed Tax ID and Phone number (if not available) on click **CLICK HERE TO GET STARTED**
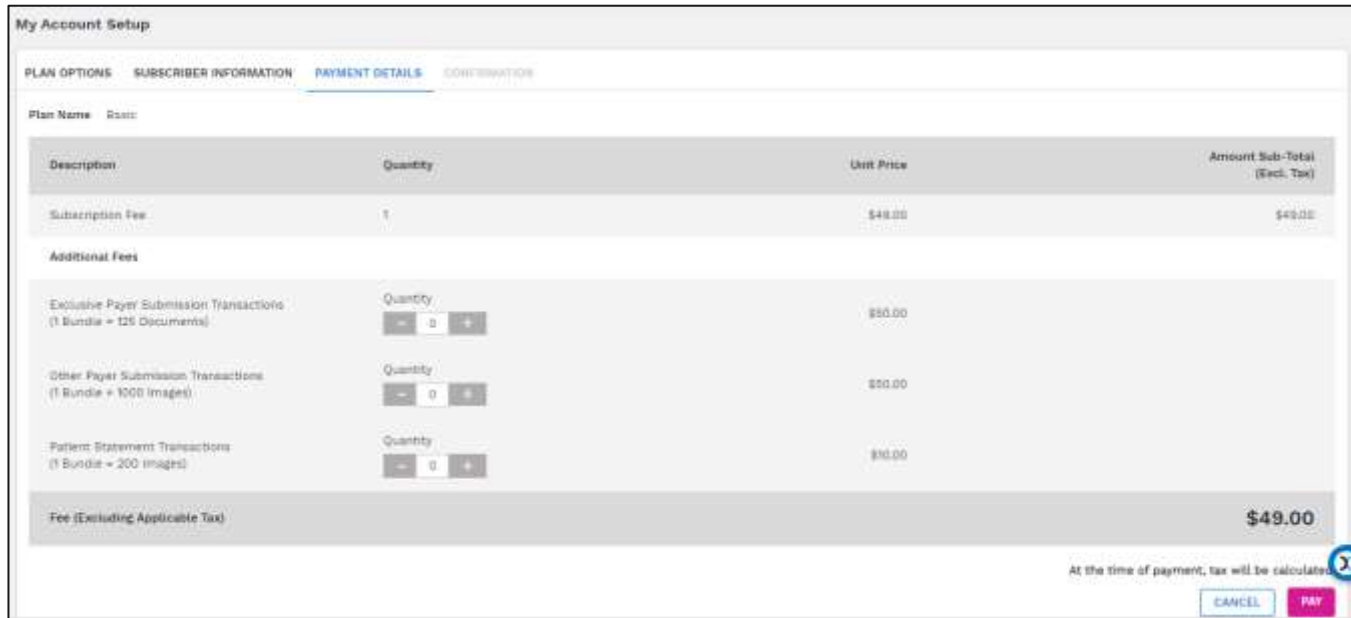
Figure 8: My Account Setup – Promo Code User Page

5.5. Payment Details (Available for Super Admin Only)

Once the user has completed Subscriber Information then Payment Details needs to be completed for all paid plans. Through this screen the User would be able to make subscription payment, if required purchase additional bundles based on their requirement. The tax is calculated for the services, if applicable.

Note: This page would not be available for the Payer Sponsored Plan and Free Trial Plan

- Click on the **PAYMENT DETAILS** sub-tab the below page will be displayed:

Figure 9: My Account Setup – Payment Detail Page

To Purchase a Plan

- Here, the user can view their selected Plan name in **'Plan Name'** field.
- The Subscription Fee automatically gets populated based on the plan Selected.
- User can purchase required number of additional Exclusive Payer Bundles by indicating the number of required bundles under **'Quantity'** field against **'Exclusive Payer Transactions'.**

Note: 1 Bundle=125 Documents

- User can purchase required number of additional Other Payer Bundles by indicating the number of required bundles under **'Quantity'** field against **'Other Payer Transactions'.**

Note: 1 Bundle=1000 Images

- User can purchase required number of additional Patient Statement Bundles by indicating the number of required bundles under **'Quantity'** field against **'Patient Statement Transactions'.**

Note: 1 Bundle=200 Images

- Click on the [+] button to add the number of Bundles/Users
- Click on the [–] button to decrease the number of Bundles/Users
- Click on the **CANCEL** button to go back to the previous page if required otherwise

- Click on the **CONTINUE** button the below page will be displayed:
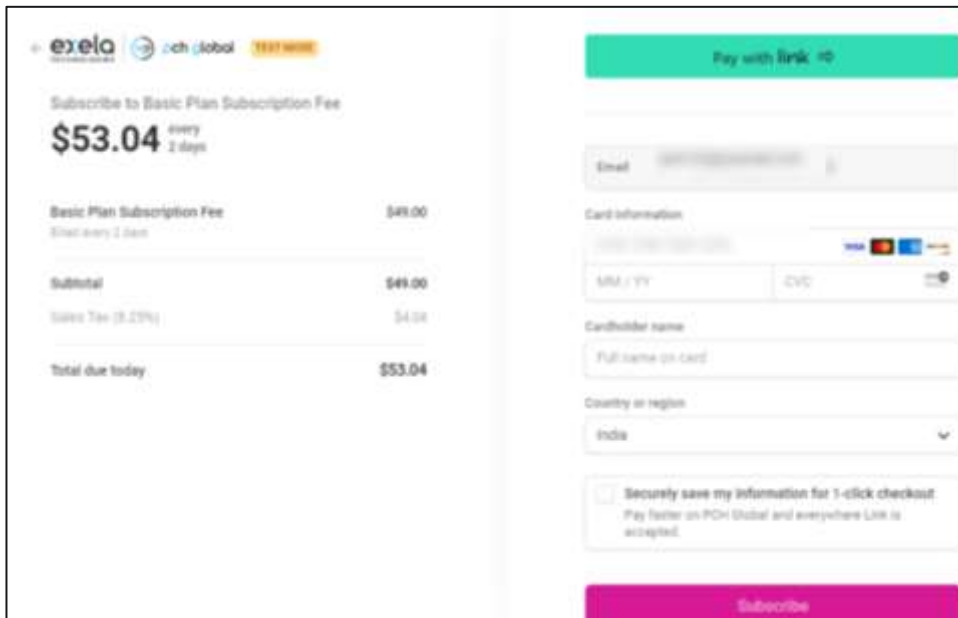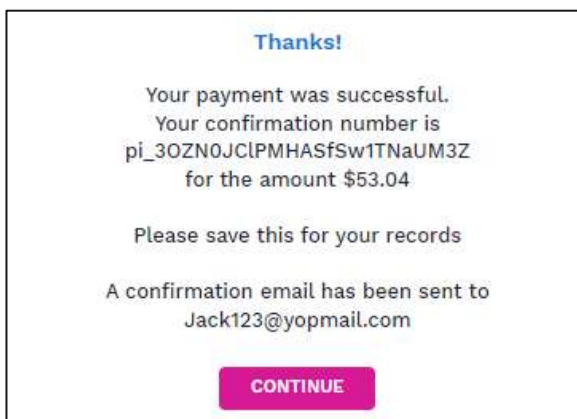- Click on **PAY** button , following payment tax calculation page appears as follows

Figure 16: My Account Setup – Payment Confirmation Page

- Enter the required information and click **Subscribe**
- Once the payment is made, the user would get confirmation message indicating the confirmation number along with the Paid amount. Also the paid invoice copy would be sent to the user registered Email ID.

- Click on the **Subscribe** button to make payment, following popup message will appear

Thanks!

Your payment was successful.
Your confirmation number is
pi_3OZN0JClPMHASfSw1TNaUM3Z
for the amount $53.04

Please save this for your records

A confirmation email has been sent to
Jack123@yopmail.com

CONTINUE

5.5.1. Confirmation (Available for Super Admin Only)

▪ The User would be able to see the below page, if the User has not applied the Promo Code or not subscribed to a free trial plan while setting up the Account.

Figure 17: My Account Setup – Confirmation Page