Trading Partner Overview
Trading Partner Overview

Course Description
This course will be an overview of the functions available to Trading Partners in Campus and provide an overview of how a Trading Partner will interact with DLI.

Audience
• Trading Partners using Campus

Course Length 2 hours

Prerequisites
• Campus 101
Trading Partner Portal  60 min
Requests for Information  30 min
Claim Reporting eFORMs  30 min
• After registering and logging in as a Trading Partner, you will have a customized Dashboard to help you navigate in Campus.
Trading Partner Registration Webform
You can submit a Trading Partner Registration Webform to register as a Trading Partner and submit transactions through Campus.

- To access, click the Submit a Filing drop-down and select Trading Partner Profile Registration.
- After adding the required information in each of the four steps, click Submit Form to transmit the registration form. You will be directed to a confirmation page and an email will also be sent to your registered email in Campus.
- DLI will review the request - once approved you will be able to submit transactions to the department.
Profile Updates
You can update your profile information at any time from the Trading Partner Portal in Campus.

- To access, click the View Profile button on the Trading Partner Portal.
- You will be directed to your profile screen that shows existing information. Click the Update My Profile button to begin the process.
- After completion, you will be directed to a confirmation page and an email will also be sent to your registered email in Campus.
Signing Up for EDI versus eFORM

- You will be able to sign-up for a submission method via the Trading Partner Registration Webform or the Amended Trading Partner Registration Webform.
- If submitting via EDI, there are additional fields that are required for completion.
- Complete all required fields and click Next to submit this information.
Trading Partner Overview

Transaction History
After navigating to a claim details page, a user can see the transactions that have been submitted to the claim.

• By clicking the **Reporting History** tab, information such as the transaction type and how the transaction was submitted can be viewed on this screen.
• Note that not all transactions will have a transaction details page.
Reporting Capabilities
After navigating to a claim details page, a user can see the transactions that have been submitted to the claim.

- Scroll to the bottom of the Claims Details page and select the Documents tab.
- The Download All Documents button will take you to the Download Documents window.
- After clicking the Download Documents button, a zip file will appear, and you will be notified when it is ready to download to your computer.
In this demo, you will see how to...

- Use the features in the Trading Partner Portal
- Make a Profile Update
- View Transactions and Batch Details page
Agenda

1. Trading Partner Portal  60 min
2. Requests for Information  30 min
3. Claim Reporting eFORMs  30 min
Request for Information

Request for Info Email & Webform

When an internal user sends a Request for Information to an external user, they will receive an email with instructions on how to respond, as well as the number of days they are expected to respond within.
Request for Info Email & Webform

Navigation to the response is possible in two ways:

1. Do not navigate from the email link and use the PIN, which was sent in the email.
2. Navigate via the Submit a Filing dropdown in the dashboard. (Screenshot below)

This will prompt to enter a PIN, which will link responses to the correct request for information. Clicking the link in the email, will not require to entering a PIN. The log-in page will display, and from there, directly to the webform submission. If already logged into Campus, the webform will display.
Request for Info Email & Webform

On the next page, there are two buttons: Download and View Document. The Download button will allow the download of the actual request for information, while the View Document button will be able to view it in the browser.

The response cannot be submitted without a document uploaded. Once a document or multiple documents have been uploaded, they click Submit to complete the response.
Request for Info Email & Webform

Once a response has been submitted, the process has been completed. The user who submitted the response can view it on the My Forms Queue on their dashboard.
Missing Benefits Webform

Campus can be used by external parties to submit missing benefits. To file this, go to the External Claim Details page and click the Submit a Filing button. Provide any required information, attachments or additional details and Submit Form to complete.
Requests for Information

Object to Penalty Webform
DLI can also send alerts to Claim Admins when their first action is past due.

- They will receive an email indicating what is needed and with a link taking them to the associated claim.
- The link in the email will take them directly to the Claim, where they can view the details of the request and take the necessary action.
- Any filing can be done by using the Submit a Filing button and choosing the appropriate submission.
Penalty Details Page
The Penalty Details page is where you can see all pertinent details to a current penalty. Also, you can take appropriate action on a penalty from this page.

Insurance Coverage Gap Penalty on Taylor Tools
Penalty: PN-05-9999-433

Penalty Details
Penalty Type
Insurance Coverage Gap

Due Date
6/30/2020

Balance Due
$500.00 due as of 7/1/2020

Penalty Status

Responsible Party

ER-02-5696-556: Taylor Tools

Penalty Amounts
Warning
No

Total Amount
$1,100.00

Additional Details
Object to Penalty Webform

- The main focus of the penalty objection webform is to provide the reason for why you are objecting.
- To submit the objection, you also must either attach documents, or provide additional information in the narrative section.
In this demo, you will see how to:

• View a Penalty Details Page
• File the Object to Penalty Webform
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Navigating to eForm

- To access, log into Campus with the appropriate external user account. *(Ex. A Trading Partner acct)*
- Once you have logged in, you will see the **Submit eFORM or Webform** button in the top right corner of the screen.
- You can choose to use this button for submitting an eFORM or you can choose a specific Claim from your **My Queues** section and submit an eFORM from the Claim Details page.
PPD Follow-up Webform

• To access, choose **PPD Follow Up Webform** from the list on the eFORM Submission page.
• The webform will display, just add the required information and click **Submit Form** to complete.

![PPD Follow-up Webform](image_url)

If there is a *, the information is required to proceed.
Dependency Webform

- To access, choose Dependency Info Webform from the list on the eFORM Submission page.
- The webform will display, just add the required information regarding the employee’s dependents and click Submit Form to complete.
Serving Documents
Some of the webforms in Campus have the ability to serve documents to all parties on the Claim through the Affidavit of Service.

- From the **Initiate Dispute** webform, you can access the **Affidavit of Service** webform page.
- To highlight the serving documents functionality, we can see the Affidavit of Service screen and the required information needed to serve parties on the Claim.
In this demo, you will see how to:

- View and understand the Dependency, PPD, Discontinuance and Disability Status webform
Congratulations in completing Trading Partner Overview!