Online Order User Manual

www.comtrans.net/orders
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<td>35</td>
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</table>
I. Register

Registration can be done for yourself or on behalf of another person. The email address of the person being registered is required.

- To register yourself, go to <comtrans.net/orders>, select Register New User. (for further directions, continue to “Complete Required Fields” section)

- To register another person, you must have permission to enter claims for other case managers (see site administrator for access). Log in, select Orders from the top menu, and then New Order from the top left corner. When prompted to choose the person for whom you are entering the order, select the New User button.
New Order

Select the person you are entering this order for.

Last Name

Find

Cancel

New User (User is entered as validated for now.)

Records 1 - 27 of 1091 record(s) that match the search criteria

Go to page 1 of 44 page(s)
Complete Required Fields-Domain

Register New User

If registering another user, there will be no password field.

- Use your company email username and domain* (username@domain.com).
- Select Get Available Sites For Domain after entering email. Use the drop down menu to select your payer (if prompted) and site.
  * The domain of the user or case manager is important to the correct setup of each client. If the domain has not been approved by ComTrans as valid, the entry will not be allowed (see error below).

Register New User

If you believe you have received this message in error, please check the domain spelling. If it is correct, please click on the online support ? on the top right hand corner of the screen.

- After all fields are completed, select Submit.
**Confirmation Email**

After the registration is submitted, a confirmation will be sent to the email address provided. Follow the link in this email to become an active user. If you were registered by your site administrator, use the password provided in the confirmation email. After logging in, select *Edit User* and change your password.

**II. Home Page**

To create or manage orders, *Log In*. Enter email and password, *Log In*. To edit your user information, select *Edit User* from the top menu.
### III. Orders

**New Order**
- Log in
- Select *Orders* from the top menu, then *New Order.*
Choose responsible person

- If you have not been given access to enter orders for others, the “Select the person you are entering this order for” screen shown above will not appear. If you would like access to enter orders for others, ask your site administrator for “Allow Entered By” access.
- Site administrators: see Special Instructions for Site Administrators: User Permissions for instructions on how to grant a user “Allow Entered By” access.
- If you are the responsible person (case manager), select your name.
- If you are creating the order on behalf of someone else, select his/her name.
- If the responsible person is not listed, select New User.
**New User**

- To add a new user, follow the procedure outlined in the Register: Create New User section above. **You must have that person’s email address to add them.**

**Add New User**

![Add New User form](image_url)

- Complete the required fields.
- Select *Submit*.
- Choose the case manager from the list and select *Next*. 
Select Participant(s)/Passenger(s)

A participant is typically the person identified for billing purposes (more than one can be listed). Passengers are other people who will be transported with the participant (who are not eligible for services).

- Select the participant needing transportation.

Use the Add Participant and/or Add Passenger buttons if more than one person is being transported, and Select the additional person/people.

- If participant/passenger is not listed, add as directed in the New Participant/Passenger section below.
• Make sure the Primary Participant is designated by selecting the radio button next to his/her name.
• When all participants/passengers are listed, select Next.

New Participant/Passenger
A. If the participant/passenger is not already listed, select New Participant/New Passenger from the selection screen. After adding the participant, the information will be saved for your site’s future use.
Enter required participant information.

ID: most programs assign each member or participant an ID to uniquely identify their members. Please use the one assigned to the participant. If the program does not have an ID for the client, use the first initial, last initial, DOB, male (M) or female (F), zero: “CW120170F0.”

Submit, Select participant.

B. Passengers are those accompanying the participant (if there are any).

- Enter as much passenger information as is available.
- Substitutions such as “Jane Doe” or “Mom Jones” are acceptable.
- Unknown DOB: 01/01/01.

**Trip Appointment**

Complete the Appointment Times form following the guidelines listed below.
A. Order Information
   - **TR #**: assigned to each trip as an internal reference number for ComTrans.
   - **Status**: “Unsubmitted” the order has not been submitted; “In Process” the order has been submitted; “Processed” the order has made it to the Comtrans schedulers; “Accepted” the trip has been scheduled.

B. Reason
   - Select the reason for the transport from the selected list.
   - If it is not listed, select *Other* and enter the reason. If you regularly have a reason for transport that is not listed, please notify an administrator who can add it for you.
C. Trip Type
- **Round trip:** transport to and from appointment; enter time in appointment and return.
- **One Way:** transport *TO* appointment only; enter time in appointment field.
- **One Way Return:** transport *FROM* appointment only; enter time in return field.

D. Appointment and Return
- Only one time, pick up or drop off, is required for each leg of the trip. If the Comtrans driver will need to know a pick up and drop off time, check the *Specify a Pick Up Time* or *Specify a Drop Off Time* box and provide the additional time.
- **Priority:** assigns the pick-up or drop-off time as more important. Usually the *Drop Off* time is the priority for appointments, and the *Pick Up* time is the priority for return trips, so these are the default settings. If an order takes exception to these default settings, make sure to change the priority. An example of an exception would be: if a child needs to be picked up at school at 2:10pm for a 3:30pm appointment, *Pick Up* is the priority so that the child is not left waiting at school.
- **Time Constraints:** If designating a pick up and drop off time, please remember the time constraints, such as: loading time, traffic variances, the possibility of picking up additional passengers, etc.
E. Order Type

- **One Time**: the transport occurs once on a single date.
- **Recurring**: the transport happens at the same time, with the same pick up and drop off locations, on an ongoing basis. The example below shows how to schedule an appointment that occurs every Monday, Wednesday, and Friday with the first appointment on Wednesday, February 8th, and the last on Monday, April 30th. **Always double check the date range selected to ensure that every appointment falls within the given range.**

- **Multi Day**: the transport happens at the same time, with the same pick up and drop off locations, on multiple days. This feature should be used when transports do not occur in a pattern. For example, the transports could occur on Monday and Wednesday one week and Tuesday and Thursday another week, instead of on Monday and Wednesday every week.
  - To schedule a multi day transport, select *Multi Day* and then *Edit Trip Dates*.
  - Select the dates of transport and then select *Save*. 
Location

The location is the physical address associated with a pick up or drop off location. Once a location is saved for a client, it can be selected again on future orders for that client. Addresses entered as “pick up” locations will only be saved, and made available to use, as “pick up” locations, and addresses entered as “drop off” locations will only be saved for future use as “drop off” locations.

- Select location if it is already listed.
- If location is not listed, add as directed in New Location section below.
- If the return location is the same as the Pick Up location, check the box at the top of the screen, as seen below.
• Update contact information or special instructions as needed (for explanations of these fields see the New Location section.
• Update, Next
• Repeat the steps above for the Drop Off location.
If you did not check the box on the Pick Up location indicating that the Return Location would be the same, the next screen will ask you to provide a Return Location. Follow the same steps as on previous locations.

New Location
Locations added by Users will be saved under the participant’s name for future use. If the location is created as a pick up location, it will only be saved as a pick up location, and if the location is created as a drop off location, it will only be saved as a drop off location.

- If the location is not listed, select New Location.
## Select Location - Return

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Street</th>
</tr>
</thead>
<tbody>
<tr>
<td>ace prop</td>
<td>1234 E Southern Ave</td>
</tr>
<tr>
<td>Blah</td>
<td>1026 N 48th St</td>
</tr>
<tr>
<td>ComTrans</td>
<td>2336 E Magnolia St</td>
</tr>
<tr>
<td>Dr</td>
<td>2336 E Magnolia St</td>
</tr>
<tr>
<td>Foster Home-Smith</td>
<td>2525 N Oracle Rd</td>
</tr>
<tr>
<td>magellan</td>
<td>1816 E Roesser Rd</td>
</tr>
<tr>
<td>School</td>
<td>2336 E Magnolia St</td>
</tr>
</tbody>
</table>

Records 1 - 11 of 11 record(s) that match the search criteria.

## New Location - Return

**Location**

- Property Name
- Street
- Building
- Unit
- City
- Zip
- Cross Streets
- Latitude
- Longitude

**Contact**

- Phone

**Special Instructions**

Form fields include:

- Submit
- Cancel
A. Required Fields
   - **Property Name:** Assign a name to the property (Mom’s Home, Mesa High, Foster Home, etc.)
   - Enter the street and city (see “Latitude/Longitude” section below for how to complete these fields).
   - **Contact:** the person to be contacted at the location if there is a problem. Select Use Case Mgr or Use Client to automatically populate with their data, or type in the name and phone number of another person.
   - **Special Instructions:** notes about the location such as, “Gate code: ABCD,” “Enter from west side of building,” etc.
   - The special instructions and contact information entered while creating a new location will automatically show every time the location is used. However, it can be edited each time the location is selected.

B. Latitude/Longitude
   - Enter **Property Name, Street, and City.**
   - Select **Geocode Address.** The zip code, latitude, and longitude should automatically populate.
   - If selecting **Geocode Address** generates an error message (shown below), select **Use Map.**
After selecting *Use Map*, follow the directions on the *Map Helper* page to mark the address as accurately as possible. Then *Update* the location. The latitude and longitude will now populate.

- *Submit*

**Comments**

- Include comments explaining any circumstances of which the driver may need to be aware (i.e. the child cannot be left alone, schedule with John Doe, may try to run—please hold the child’s hand while walking, etc.).
- Comments will appear for all legs of the trip.
- *Update, Next*
Review Order

- Check order for accuracies; use links on the left side of the page to go back and make changes.
- Print for your own record if desired. Selecting Print Order will generate a PDF copy of the order.
- Select the black Submit Order button on left hand side to submit. When the screen refreshes and the Order Status has changed from “Unsubmitted” to “In Process,” the order has been submitted.
- When the order is accepted by ComTrans, the person who entered the order and the “responsible person” will receive a confirmation email. If this email is not received within 1 business day, please contact ComTrans.

IV. Order Status

- Login.
- Select Orders from the top menu.
- Select Pick to search for a particular participant.
- After specifying search criteria, click Find.
- “Unsubmitted” the order has not been submitted; “In Process” the order has been submitted; “Processed” the order has made it to the Comtrans schedulers; “Accepted” the trip has been scheduled.
- Any orders left in “unsubmitted” status will generate a reminder email for the user. If these orders are not submitted or deleted by the user, they will automatically be deleted.

V. Copy Order

If a new order is going to be almost the same as a previously entered order, the old order can be copied, changed, and submitted. For example, if the case manager enters a recurring appointment for a one month date range and the next month needs to schedule the same recurring appointment, he/she can use the “copy” feature.

- Login
- Find the previously created order. To search by participant, select Pick next to the Participant field, Select the participant, and then choose Find.
- Select the Copy button next to the previous order.
- Update any information that has changed.
- Review the order very carefully to make sure all information has been updated.
- Submit as usual.
VI. Changing Single Orders

- Follow the steps listed in “Check Order Status” section to view existing orders.
- Select Tickets.
- Select the Ticket number hyperlink for the trip needing to be changed.

<table>
<thead>
<tr>
<th>Ticket</th>
<th>Service Date</th>
<th>Route</th>
<th>A or R</th>
<th>Bill Call</th>
<th>Appointment</th>
<th>Sched. PU</th>
<th>Actual PU</th>
<th>Sched. D/V</th>
<th>Actual D/V</th>
<th>P/U</th>
</tr>
</thead>
<tbody>
<tr>
<td>1900642</td>
<td>03-14-2012</td>
<td>Open</td>
<td>R</td>
<td>Prior Day Cancel</td>
<td>00:05p</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
<td>1900643</td>
<td>03-15-2012</td>
<td>Open</td>
<td>R</td>
<td>Prior Day Cancel</td>
<td>00:05p</td>
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<td></td>
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<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
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<tr>
<td>1900644</td>
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<td>Open</td>
<td>R</td>
<td>Active</td>
<td>00:05p</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
<td>1900645</td>
<td>03-19-2012</td>
<td>Open</td>
<td>R</td>
<td>Active</td>
<td>00:05p</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
<td>1900646</td>
<td>03-20-2012</td>
<td>Open</td>
<td>R</td>
<td>Active</td>
<td>00:05p</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
<td>1900647</td>
<td>03-21-2012</td>
<td>Open</td>
<td>R</td>
<td>Active</td>
<td>00:05p</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
<td>1900648</td>
<td>03-22-2012</td>
<td>Open</td>
<td>R</td>
<td>Active</td>
<td>00:05p</td>
<td></td>
<td></td>
<td></td>
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<td>2336 E MAGNOLIA ST. Phn</td>
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<tr>
<td>1900649</td>
<td>03-23-2012</td>
<td>Open</td>
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<td></td>
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<tr>
<td>1900650</td>
<td>03-26-2012</td>
<td>Open</td>
<td>R</td>
<td>Active</td>
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<td></td>
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<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
<td>1900651</td>
<td>03-27-2012</td>
<td>Open</td>
<td>R</td>
<td>Active</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
<tr>
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<td>Open</td>
<td>R</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>2336 E MAGNOLIA ST. Phn</td>
</tr>
</tbody>
</table>

The left side shows the ticket as originally scheduled. To make a change, click Update Ticket and then enter desired changes.
• If you are canceling or editing *less than one business day before the transport*, please contact Comtrans directly.

• An email confirming the change will be sent to the address designated on the order.

• The change will be added to the comments section of the order when you “view” it.

**VII. Changing Recurring Orders**

• Follow the steps listed in “**Check Order Status**” section to view existing orders.

**Cancel**

• Select *Cancel*.

• Enter the date the cancelation will take effect and the reason for canceling.

• Transports before the “effective date” will not be canceled.

**Edit**

• To edit a single trip in a recurring order, follow the steps in “**Changing Single Orders**.”

• To change every trip in, or extend, a recurring order, Select *Edit*.

• Specify whether the order is being extended to include future dates, or if the order information is being changed.
For changes: enter the date the change will be effective and make the desired changes on the order screen that pops up. This order will be assigned a new TR number.

For extensions: enter the extended date range.

VIII. Reassign to a Different Case Manager
This page allows participants or trips to be moved to another case manager.

Reassign Case Manager

<table>
<thead>
<tr>
<th>From Case Manager</th>
<th>Pick Case Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Case Manager</td>
<td>Pick Case Manager</td>
</tr>
<tr>
<td>TR No.</td>
<td></td>
</tr>
<tr>
<td>Participant</td>
<td>Pick Participant</td>
</tr>
</tbody>
</table>

- If an TR number is specified then the case manager for that order is changed.
- If a primary participant is specified then the case manager for all orders with that primary participant is changed.
- Otherwise the case manager is changed for all orders with that case manager.

- Select Reassign Case Manager from the top menu.
- Click Pick Case Manager to Select both the case manager from whom you are removing the participant or trip, and the case manager to whom you are moving the participant or trip, respectively.
- If only one order needs to be transferred, enter the Trip Number found at the top of the “Review Order” page. (Can’t find the order? Follow the “Check Order Status” directions, and then select view.)
- If all orders for a particular participant need to be transferred select Pick Participant, and Select the participant. This participant’s information will be moved to the new case manager’s account.
- If all orders for all participants from the first case manager need to be transferred to the second case manager, leave the “Order No.” and “Participant” fields blank.
- Submit
IX. Permission Levels

When Users login and select Admin from the top menu, the sidebar will only list the menus that person has permission to access. The four permission levels are listed below. If you would like a higher level of access, please contact your site, payer, or Comtrans administrator. You can reach a Comtrans administrator by clicking on the red question mark for online support.

Users
Users can select what group they are in and place orders.

Site Administrators
Site Administrators (Admin) can see and edit all of their users, groups, locations, participants, and orders.

Payer Administrators
Payer Admin can see and edit all of their Sites.

Comtrans Administrators
ComTrans Admin can see and edit all Payers.

X. Special Instructions for Site Administrators
To perform the following Site Administrator tasks, log in, select Admin from the top menu, and use the “Site” menu on the sidebar. If the menu below “Site” is hidden, click the square next to “Site” to expand it.
Groups
On the Groups page, site administrators can create and manage groups. This allows specified users at the site to see and edit only each other’s orders.

Select Group

Records 1 - 4 of 4 record(s) that match the search criteria.

- To create a new group, select Add Group, enter a group name, Submit.
To manage members of a group, click the Select button next to the group name. Use the Remove and Add User buttons to specify group members.

- Use the Edit button to change the name of the group.
- Use the Delete button to delete the group.

**User Permissions**

On the Users page, site administrators are able to edit User permissions and add new users.

- To add a new user, select Add User. Complete required information and Submit. The user will be sent an email asking him/her to login with given username and password.
- To edit a user and/or user permissions, select the Edit button by the user’s name. Checking the “Site” box designates the user as a site administrator. Allow Entered By means the user will be able to create orders for any other case managers at his/her site and register new users. (see below)
Common Locations

On the Common Locations page, site administrators can add locations frequently used by Users at their site.

Manage Common Locations
Locations
On the Locations page, site administrators can create new locations and assign them to particular clients. The only locations that will appear for all participants are the locations of the sites.

Participants
The Participants page allows site administrators to merge, edit, and add participants. Participants added here will be available to all users at the site.

- To change information about a participant at your site, select Participant from the sidebar. Select the Edit button next to the participant you would like to change, make changes, and Submit.
- To add a new participant for users at your site to choose, select Participant from the sidebar. Select the New Participant button, enter participant information (as explained in “New Participant/Passenger”) and Submit.

Manage Participants

Last Name [ ]

Find Cancel

SFM : Select Participant For Merge

<table>
<thead>
<tr>
<th>Name</th>
<th>DOB</th>
<th>Gender</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbas, Muna</td>
<td>02-27-1977</td>
<td>F</td>
<td>110036</td>
</tr>
<tr>
<td>Abegg, Linda</td>
<td>03-08-2009</td>
<td>F</td>
<td>test</td>
</tr>
<tr>
<td>Abelen, Mary</td>
<td>01-12-1954</td>
<td>F</td>
<td>052410</td>
</tr>
<tr>
<td>Abrahamson, Julia</td>
<td>07-14-1957</td>
<td>F</td>
<td>JA0714</td>
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<tr>
<td>ACEDO, ALYSSA</td>
<td>05-22-1999</td>
<td>F</td>
<td>394376</td>
</tr>
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<td>Acado, Angelique</td>
<td>10-05-2004</td>
<td>F</td>
<td>082706</td>
</tr>
</tbody>
</table>

New Participant Merge Selected Participants Clear Selected Participants Help

Records 1 - 26 of 9750 record(s) that match the search criteria.
Go to page 1 of 390 page(s) Go! Next

- To merge duplicate participants (combine, instead of delete, without losing past information), select SFM beside two duplicate participants. Merge Participants.
On the Merge Participants page, make sure the correct information for the person is in the “Participant” section (the first participant chosen will be listed in the “Participant” section). Submit.

Any past data for the person listed in the “Duplicate Participant” section will be combined with the “Participant,” and only the “Participant” will be seen by users. For example, using the information above, all of Jane Doe’s completed and pending transportation orders would be reassigned to Jane Doe. Information will not be lost, but will be found under Jane Doe’s profile.
**Passengers**

The *Passengers* page allows site administrators to edit and add passengers. Passengers added here will be available to all users at the site.

- To make changes to a passenger at your site, select *Passenger* from the sidebar. Select the *Edit* button next to the passenger you would like to change, make changes, and *Submit*.
- To add a new passenger for users at your site to choose, select *Passenger* from the sidebar. Select the *New Passenger* button, enter passenger information (as explained in “*New Participant/Passenger*”) and *Submit*.

**Reason**

The *Reason* page allows site administrators to edit and add reasons for transportation.

- To make changes to a reason for your site, select *Reason* from the sidebar. Select the *Edit* button next to the reason you would like to change, make changes, and *Submit*.
- To create a new reason for users at your site to choose, select *Reason* from the sidebar. Select the *Add Reason* button, enter the reason, and *Submit*.

**Mobility**

The *Mobility* page allows site administrators to edit and add choices for participant mobility.

- To make changes to a mobility option for your site, select *Mobility* from the sidebar. Select the *Edit* button next to the mobility you would like to change, make changes, and *Submit*.
- To create a new mobility option for users at your site to choose, select *Mobility* from the sidebar. Select the *Add Mobility* button, enter the mobility choice, and *Submit*.

**Review Orders**

Use the *Review Orders* page to review all orders for your site.
XI. Special Instructions for Comtrans Administrators

To perform the following Comtrans Administrator tasks, log in and use the “Admin” menu on the sidebar. If the menu below “Admin” is hidden, click the square next to “Admin” to expand it.

**Chat Support for Clients**

**Edit Vendors**

The *Edit Vendors* page allows Comtrans administrators to edit and add other vendors.

- To make changes to a vendor, select *Edit Vendors* from the sidebar. Select the *Edit* button next to the reason you would like to change, make changes, and *Submit*.
- To create a new vendor, select *Edit Vendor* from the sidebar. Select the *Add Vendor* button, enter the vendor information, and *Submit*.

**Select Payer/Site**

Use the *Select Payer/Site* page to navigate to the site you need to manage.
• Click Select Payer/Site, Select the Payer, Select the Site. Then use the links in the sidebar “Site” menu to manage the site (see “Special Instructions for Site Administrators”).

Add User to Site
After selecting Add User to Site from the sidebar, Select the user; Select the site, then Add user to site.

RPC Key, Import Payers and Sites, and Edit Message Board
Do not use these pages unless directed by someone on the IT staff.

XII. Online Support
For immediate assistance during business hours, click on the online support question mark.

XIII. Frequently Asked Questions

How do I get past this error message?

• Error: "XMLRPC: Can't talk to server could not sent XMLRPC Message (Reasons: Access Denied on Client)"


How do I change an order before submitting it?

• Follow the steps listed in Check Order Status section to view existing orders.
• Select Edit.
• Use the blue links on the left side of the screen to navigate between sections.
How do I register if I get an error saying “Domain not recognized?”

- The Domain on your email log in needs to be from your company/site.
- Double check the spelling.
- If the spelling is correct, your site may not be registered with ComTrans.
- Contact Online Support.

How can I change my password?

- Login under User Login.
- Select Edit User.
- Enter desired password and Submit.

Who can I contact if I have questions?

- Online Support
- or-
- Click Comments/Suggestions on the top menu.