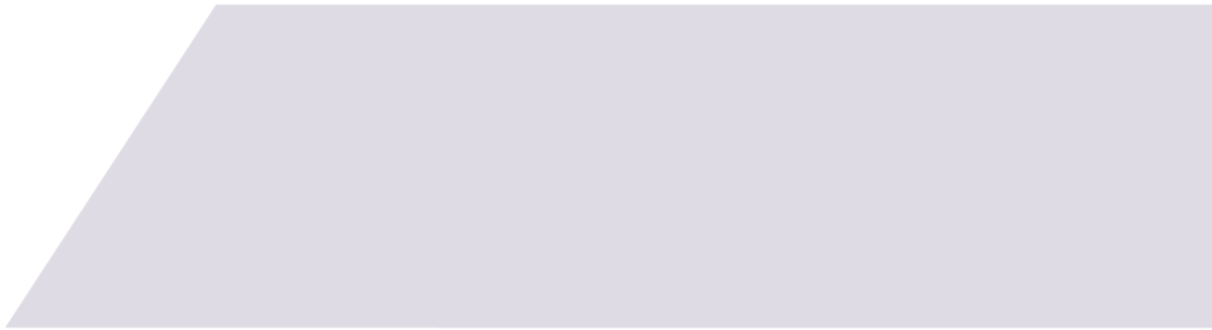
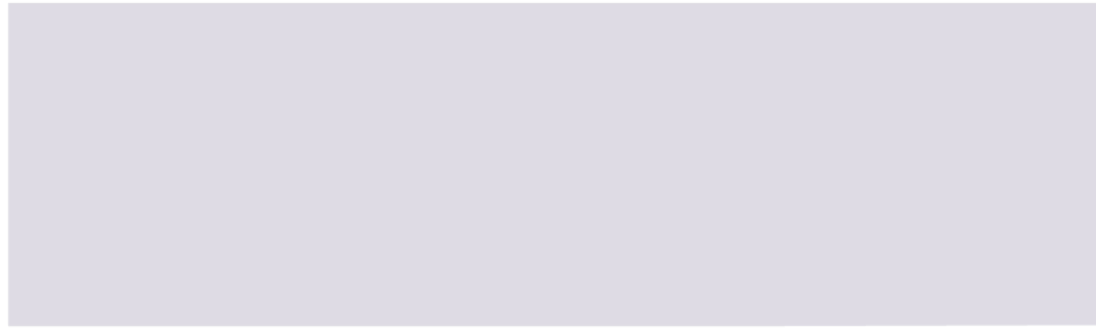


Payments Portal: Administration

Training Guide



**Texas Children's[®]
Health Plan**

zelis[®]

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Introduction

Welcome! As part of the Zelis network, your robust payments portal includes access to 350+ payers with a single login. You can find your payments with easy-to-use search options - and download the results in the format that works for you. You will also find the resources you need to personalize and manage your account.

Take a moment to understand the intended audience, pre-requisites, and access requirements for the material covered in this training guide.

Intended Audience

This guide is intended for all payees utilizing Zelis® Portal.

Within this guide, you will learn about Registering for the Portal, User Management, Settings, and SSO Accounts.

Pre-requisites

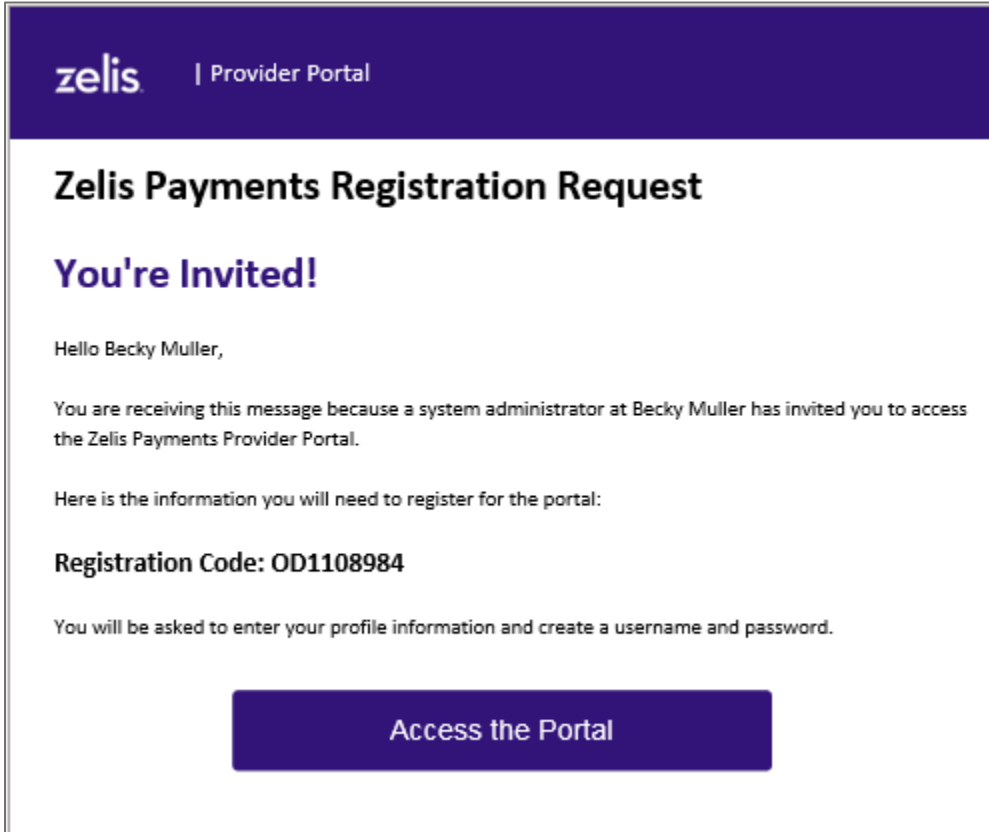
There is no pre-requisite knowledge needed prior to using this guide.

Access Details

As the administrator, you should have access to information. If you need support, contact Zelis® at call 877-828-8770. This guide focuses specifically on administrative tasks within the portal. For general features, see the Payments Portal Training Guide.

Registering for the Portal

The Zelis® representative will send an email including a link to register for your portal. An example of the email is below.



Registration

1. Did a Zelis associate send you the Guided Enrollment Link?

Did a Zelis associate send you the Guided Enrollment Link?

Yes No

Practice TIN:

Corporate NPI:

Registration Code:

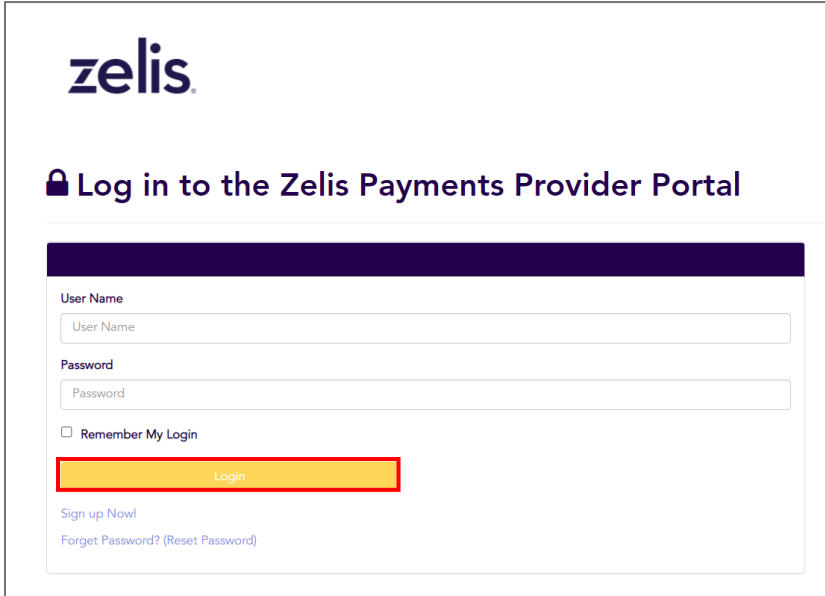
[Next >](#)

1. The Portal will ask you to confirm your business' TIN, NPI and Registration Code (from the email). Once confirmed, click **Next**.
2. You will then be prompted to create a **Username**.
3. After you create a Username, for security purposes, you will receive a separate email with a link to create your **password**.

You are now considered the Admin of your portal and have the capability to set up other users. You will see the option to complete your enrollment setup when you log in.

Accessing the Portal

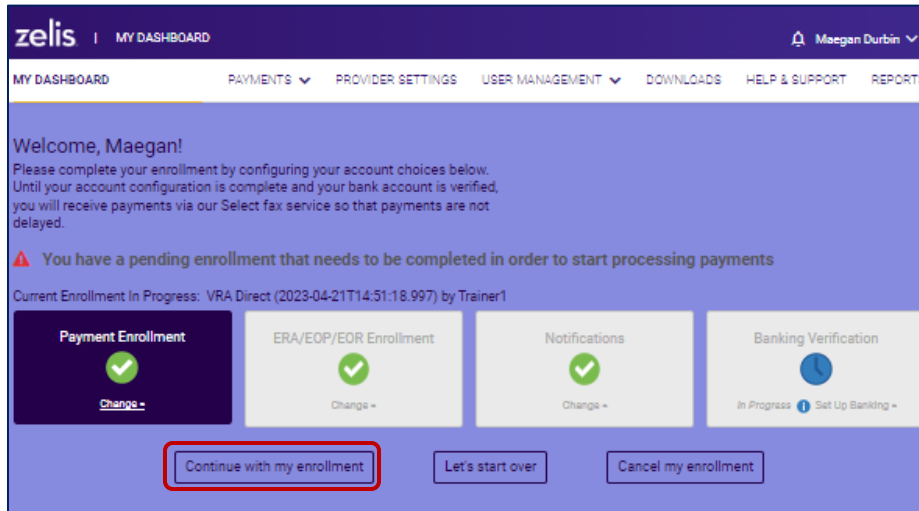
The portal can be accessed via <https://Provider.zelispayments.com>.



The screenshot shows the login interface for the Zelis Payments Provider Portal. At the top left is the Zelis logo. Below it is the heading "Log in to the Zelis Payments Provider Portal" with a lock icon. A dark blue horizontal bar is positioned above the login fields. The "User Name" field is a text input with "User Name" as a placeholder. The "Password" field is a text input with "Password" as a placeholder. Below the password field is a checkbox labeled "Remember My Login". A prominent orange "Login" button is located below the checkbox. At the bottom of the form area, there are two links: "Sign up Now!" and "Forget Password? (Reset Password)".

Navigating the Portal

The portal is organized topically using menus along the top, making it easy to navigate to your payments, view downloads and manage your settings. The messages area at the top will initially include the final steps for completing your enrollment. Simply click “Continue with my enrollment” to finalize the desired settings for your portal configurations.



View the [general Training Guide](#) to learn about the dashboard available to your team once enrollment is complete.

User Management

The User Management menu is available to the administrator to manage staff logins.

User Management Screen

The User Management screen enables you to create and update accounts as needed.

Search... Type in Full Name, User Name, or Email Address to start				
Add a User				
Full Name	Username	Email	Title	Actions
Jane Doe	ecf1107659-1	erin.farissier@zelis.com	Billing Mana...	View Details Edit Reset Disable

How to Add a User

1. Within the **User Management menu > User Management**, click the **Add a User** button.

The *Add User* pop-up displays

2. Fill out the **User Details** for the new User.

Add User

Add User

User Details

First Name:

Last Name:

Title:

Username:

[Click to validate username](#)

Email:

Confirm Email:

Phone:

Permissions

Downloading Data
Allow access to download & export from the portal

Lookup of Claims
Allow access to search & view claims

Lookup of Payments
Allow access to search & view payments

Manage Notification
Allow user to manage notifications

Manage Payment Options
Allow access to elect how Zelis Payments Solutions makes payments to you

Provider Information
Allow access to view & edit provider's information

User Management
Allow access to view & edit user's information

[Cancel](#) [Save](#)

3. In the **Permissions box**, you MUST provide the following permissions:

- Downloading Data
- Lookup of Claims
- Lookup of Payments

Without these permissions, the user will not be able to see information portal.

4. Click the **Save** button.

You must advise the new User of their username, as this will not be emailed to them. The User will receive an email with a link to create their password.

Unlocking & Resetting MFA, Password and Security Questions

Not only can you create users and define their privileges, but you can assist in troubleshooting their access, by clicking the Reset link to the right of a user's account.

You will then check the appropriate box. If an option is not available to select, it is not relevant for that account.

Actions

[View Details](#) | [Edit](#) | [Reset](#) | [Disable](#)

Reset User Options	<input type="checkbox"/> Unlock Account	<input type="checkbox"/> Wipe MFA	<input type="checkbox"/> Reset Password
	<input type="checkbox"/> Erase Security Questions	<input type="checkbox"/> Enable Account	

- // **Unlock Account:** Only available if an account has been locked out.
- // **Wipe MFA:** This will reset the Multi-Factor Authentication configuration, sending an email to recreate the configuration.
- // **Reset Password:** This will trigger a password reset email for that account.
- // **Erase Security Questions:** This will reset the security questions for this account, requiring new questions be set upon next login.
- // **Enable Account:** This will enable a disabled account.

User Activity

This screen enables you to review user activity within the system. You can define a date range, as well as click the "Details" link for more information.

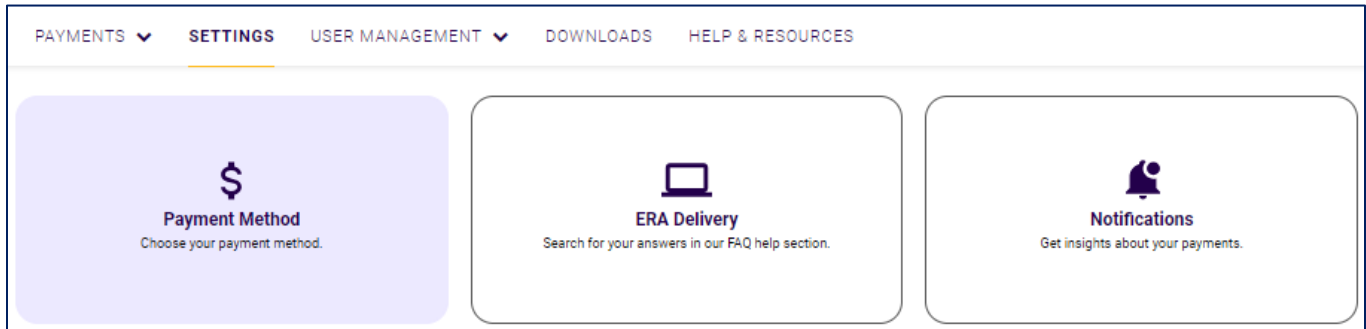
From Date	To Date
03/14/2023	04/13/2023

Start Date	User	Actions	
04/13/2023 08:26 AM	CSTraini...	Provider Portal Session Begin	Details
04/13/2023 08:16 AM	CSTraini...	Provider Portal Session Begin	Details
04/11/2023 12:10 PM	CSTraini...	Provider Portal Session End	Details
04/11/2023 12:09 PM	CSTraini...	Provider Portal Session Begin	Details
04/11/2023 12:08 PM	CSTraini...	Provider Portal Session Begin, Reset Provider User Security Questions	Details

⏪ ⏩ 1 ▼ ▶ ⏭

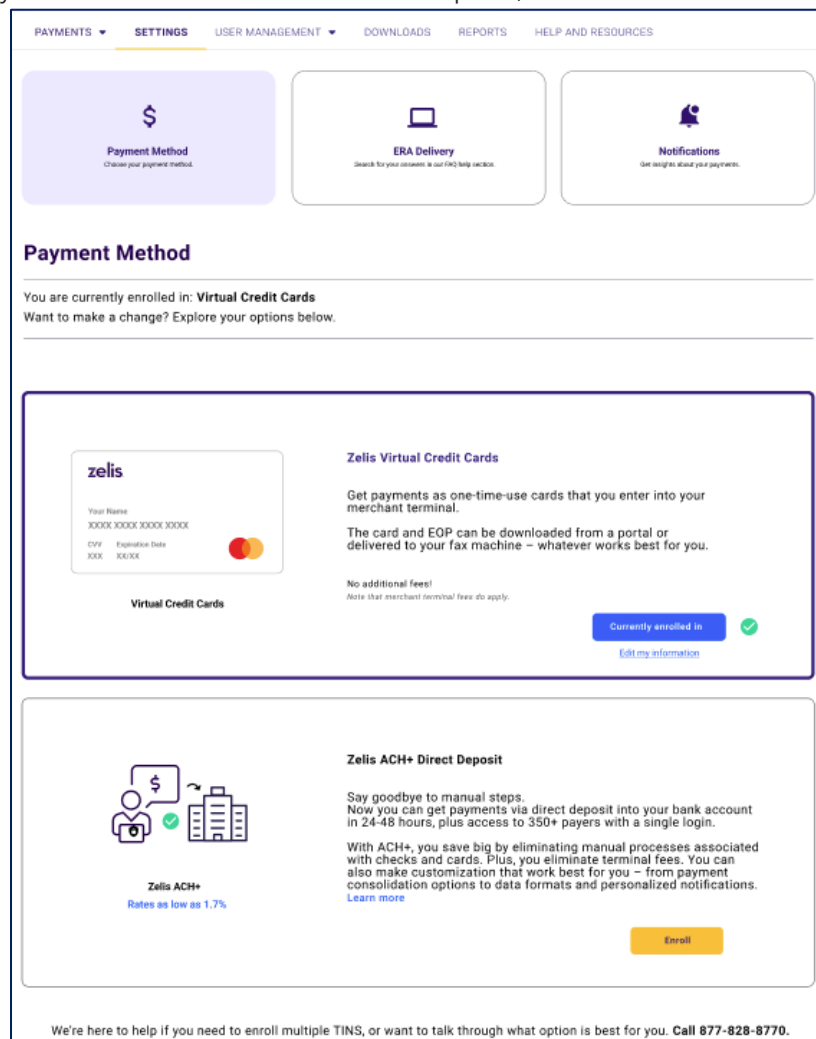
Settings

The *Settings* page is where the administrator can update payment preferences (banking info, clearinghouses, notifications, etc.) and certain contact information for delivery. Note that some changes will require a new contract and security verifications, which can take up to 10 business days.




Payment Method

The *Payment Method* section shows what you are currently enrolled in and provides the option to enroll in ACH+ Direct Deposit and Virtual Credit Card (VCC). Enrollments must be done by the Authorized Decision Maker. If you are enrolled in ACH+ Direct Deposit, this is also where banking information is updated.



Zelis® Virtual Credit Card Enrollment


Select products are Virtual Credit Cards, available by fax, mail or download. You can change the way your virtual cards are delivered within the portal.



zelis

Your Name
XXXX XXXX XXXX XXXX

CVV Expiration Date
XXX XX/XX




Zelis Virtual Credit Cards

Get payments as one-time-use cards that you enter into your merchant terminal.

The card and EOP can be downloaded from a portal or delivered to your fax machine – whatever works best for you.

No additional fees!
Note that merchant terminal fees do apply.

Virtual Credit Cards


Currently enrolled in 

How to enroll/update in Zelis® Virtual Credit Cards

1. Open the **Settings page > Payment Information section**.
2. Within the **Zelis® Virtual Credit Cards box**, click the **Enroll** or **Currently enrolled in** button.
3. Click **Yes** to the confirmation that appears.

4. In the *Business Information* section, complete the required fields (if changes are needed); and click **Continue**.

5. In the *Payment Delivery* section, indicate how your office wishes to receive Virtual Credit Cards, as well as if you wish to receive consolidated cards. If Fax is select, you will also be asked how you wish to receive notifications. Once complete, click **Continue**.

Select Product Enrollment 

Business Information

Payment Delivery

Payment Delivery Option

Zelis Payments Select - Fax (Delivery via fax machine, Recommended)

Zelis Payments Select - Print (Delivery via USPS)

Zelis Payments Select - Download

Do you want to receive Notifications when faxes fail?

Yes No

Consolidated Card Options:

Do you want to consolidate your payments?

No (Default)

Yes (You will receive one consolidated payment card for each payer, per day; the full balance of each card must be redeemed in a single transaction)

6. In the *Data Delivery* section, complete the required fields and the desired **delivery option**, and then click **Continue**.

The screenshot shows the 'Data Delivery' section with a sub-header 'ERA Delivery'. It includes instructions for providing contact information and selecting delivery options. The 'Provider Contact Information' section has fields for Name (Becky Muller), Email Address (becky.muller@zelis.com), and Telephone Number ((717) 961-1191). The 'Delivery Options' section has radio buttons for Format (835, PDF, PAPER, XLS, CSV) and Delivery (Email, FTPS, Download). The 'Download' option is selected, and a message states 'Download selected. ERA will be accessed from this portal.' There are 'Previous' and 'Continue' buttons at the bottom.

7. In the *Notifications* section, select the desired payment notification method, if any, and click **Next**.

The screenshot shows the 'Notifications' section with a sub-header 'Payments Notifications'. It includes instructions for selecting a preferred notification method. The 'Email' option is selected, and the email address 'PaymentsLearning@Zelis.com' is entered. There are also fields for 'Fax Number' and 'Text Number', which are currently empty. The 'I would prefer not to receive any notifications' option is unselected. At the bottom, there is a question 'Do you want to be notified once a week of unprocessed payments aged 15+ days?' with 'Yes' selected.

8. Finally, in the *Review and Agreement* section, the Authorized Decision Maker must review and modify as needed.

Review and Agreement

Review, Agreement and Submit Enrollment

Review Information

Business Info

Business Contact and Information

Provider Name: CStraining Test
Tax ID (TIN or EIN): 089789098
NPI: 9098765467
Street: fake street
Street (Continued):
City: Awesomeville
State: PA
Zip: 09876

Provider Contact Name

First Name: Becky
Last Name: Muller
Title: Training Manager
Email Address: becky.muller@zelis.com
Telephone Number: 7179611191
Fax Number: 555-555-5555

[Modify](#)

Payment Delivery Option

Product Line: Zelis Payments Select - Fax (Delivery via fax machine)
Receive notifications for failed faxes: Yes

[Modify](#)

Page 1 of 4

Section 1 of this Agreement or (c) resulting from any other cause not within the reasonable control of Zelis.

ZELIS MAKES NO REPRESENTATIONS OR WARRANTIES, WHETHER EXPRESS OR IMPLIED, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, WITHOUT LIMITING THE FOREGOING, ZELIS AND ITS AFFILIATES AND ITS LICENSEES DO NOT REPRESENT OR WARRANT TO PROVIDER MEMBER THAT (a) ITS USE OF THE SERVICES WILL MEET

Authorized Signature

I have read the agreement and I accept the terms and conditions

Printed Name of Person Submitting Enrollment:

Printed Title of Person Submitting Enrollment:

Email Address:


[Exit](#) [Submit](#)

9. Then, when all is accurate, **sign the contract per the terms**, and click **Submit**.

The account will automatically be enrolled in the new product and the very next payment file received will be issued via the new enrollment type.

ACH+ (VRA Direct) Enrollment

ACH+ is a fee-based option for receiving your payments via direct deposit. You may enroll in this payment type by clicking enroll. Or, if you already have it, you may click “Currently enrolled in” to update your banking information.



Zelis ACH+
Rates as low as 1.7%

Zelis ACH+ Direct Deposit

Say goodbye to manual steps.

Now you can get payments via direct deposit into your bank account in 24-48 hours, plus access to 350+ payers with a single login.

With ACH+, you save big by eliminating manual processes associated with checks and cards. Plus, you eliminate terminal fees. You can also make customization that work best for you – from payment consolidation options to data formats and personalized notifications.

[Learn more](#)

[Enroll](#)

You can click “Learn more” to learn about the steps involved.

Learn more

Zelis ACH+ Direct Deposit

To enroll in ACH+, you will need the following information:

- Your 9-digit federal taxpayer identification number (TIN) or Employer Identification Number (EIN)
- Complete legal name of your institution, corporate entity, practice or individual provider.
- Be prepared to provide the official name of the providers financial institution, account routing Transit number (RTN) and ABA routing number (bank account and routing number can be found on your business check).
- If you wish to have remittance data delivered via a clearinghouse or FPT’s site, be prepared with this information.

Enrolling/Updating ACH+ Direct Deposit

1. Open the **Settings page > Payment Information section.**
2. Within the **Zelis® ACH+ Direct Deposit box**, click **Enroll or Currently enrolled in.**
3. Click **Yes** to the confirmation that appears.

4. Follow through the enrollment pages until you reach the Review and Agreement page where you will sign and submit the contract. Please note that updating banking information will result in a pre-note and verification process that can take up to 10 business days.

Zelis ACH+ Direct Deposit

Business Information

Business and Contact Information

* Provider Name: <input type="text" value="RONALD F HAMMETT MD"/>	* Street: <input type="text" value="611 LOST LAKES COURT b"/>
* Tax ID (TIN or EIN): <input type="text" value="201900331"/>	Street (Continued): <input type="text" value="Street Address 2 (Optional)"/>
NPI: <input type="text" value="1396953634"/>	* City: <input type="text" value="WEST MONROE"/>
	* State: <input type="text" value="Louisiana"/>
	* Zip: <input type="text" value="71291"/>

Provider Contact Name

* First Name: <input type="text"/>	* Email Address: <input type="text"/>
* Last Name: <input type="text"/>	* Telephone Number: <input type="text" value="(727) 555-8888"/>
Title: <input type="text"/>	* Fax Number: <input type="text" value="(727) 555-8888"/>

[Continue](#)

Banking Information

Data Delivery

Notifications

Review and Agreement

ERA Delivery

This is where you will define how your Electronic Remittance Advise documents will be delivered (Explanation of Payment). It is as simple as entering a name, email, and phone number, then selecting the desired delivery method.

Payment Method
Choose your payment method.

ERA Delivery
Search for your answers in our FAQ help section.

Notifications
Get insights about your payments.

ERA Delivery

Your current ERA Delivery method is
Please make a selection from the options listed below to select a new delivery method.

Contact information

Please indicate the contact information of the person responsible for handling incoming remittance data at your facility.

***Name**
Full name

***Email address** ***Phone number**
Current email address Current phone number

Electronic remittance advise (ERA) is a document that shows proof of payment (such as an EOB or EOP). Choose a delivery method below – and know that you can always download from the provider portal.

Select Delivery

Please select the delivery option that are best for you.

Download
selected

Clearinghouse
select

Fax
select

FTPS
select

Save

While "Download" and "Fax" are obvious, note the options available for "Clearinghouse" and "FTPS".

Select Format

Please select the delivery format that are best for you.

835
selected

Clearinghouse
Select your clearinghouse
Select
Clearinghouse is required

Want to add additional clearinghouses?
Call client support at 877.828.8770

Select Format

Please select the delivery format that are best for you.

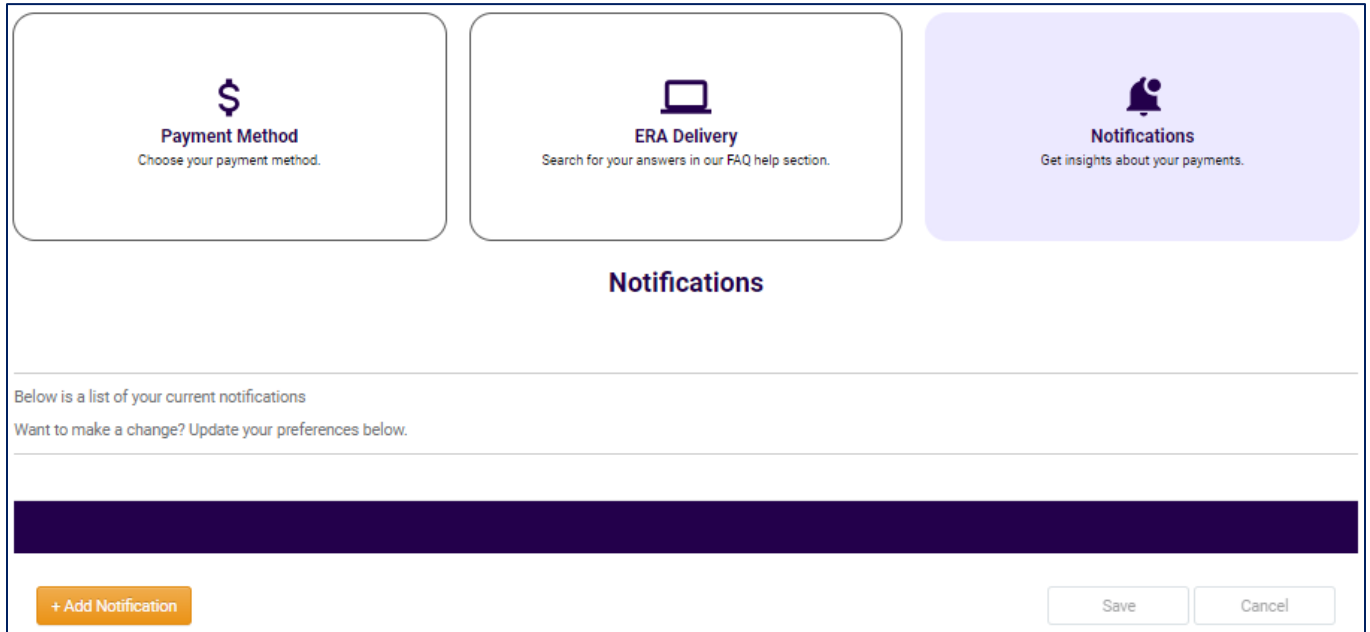
835
selected

PDF
select

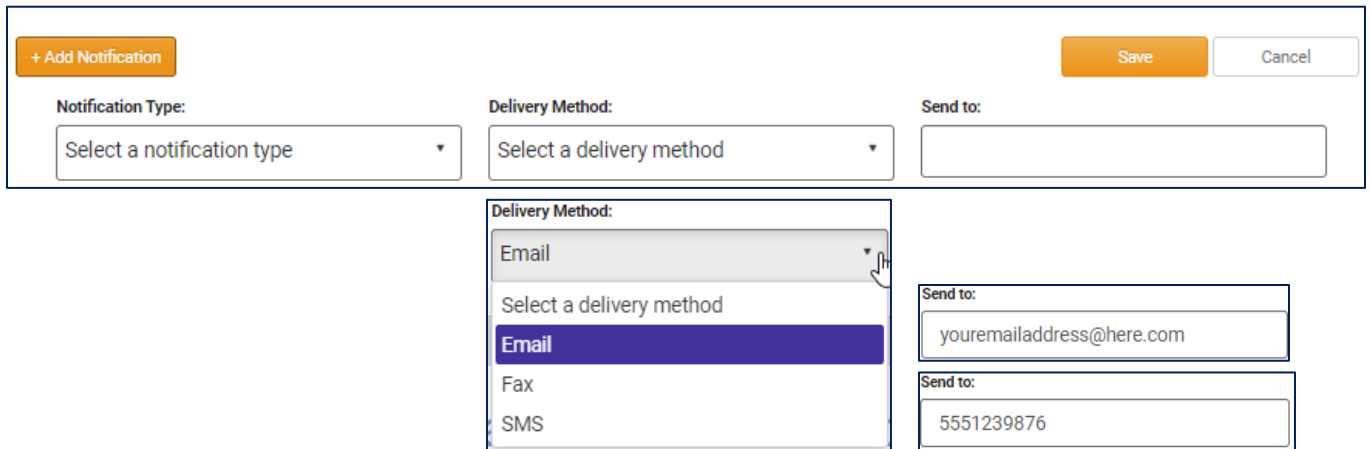
*FTP Name Enter FTP name	*FTP Host Enter host	*FTP Remote Path Enter path
*Login Enter login	*Password Enter Password	*Confirm password Confirm password

Notifications

In the *Notifications* section of *Settings*, you can update how you are notified of payments. You can be notified via Email, Fax, Text or not at all. Note, if you are currently enrolled in the ACH+ (VRA Direct) product, it is best to have a Zelis® agent update your notifications so you do not have to resign a contract and start the verification process over.




Adding notifications is as easy as clicking **+Add Notification**, selecting the **Notification Type** (currently only one option), **Delivery Method** and filling in the **Send To** field (email or phone number). Once you have notifications in place, you will see the option to edit or delete.




Reports

The *Reports* page is available for customers with ACH+ (Payments through Zelis® via Direct Deposit) accounts set up on the *Gross Settlement* type, only. This page allows you to view reports that map any related fees.

Reports

From: 

To: 

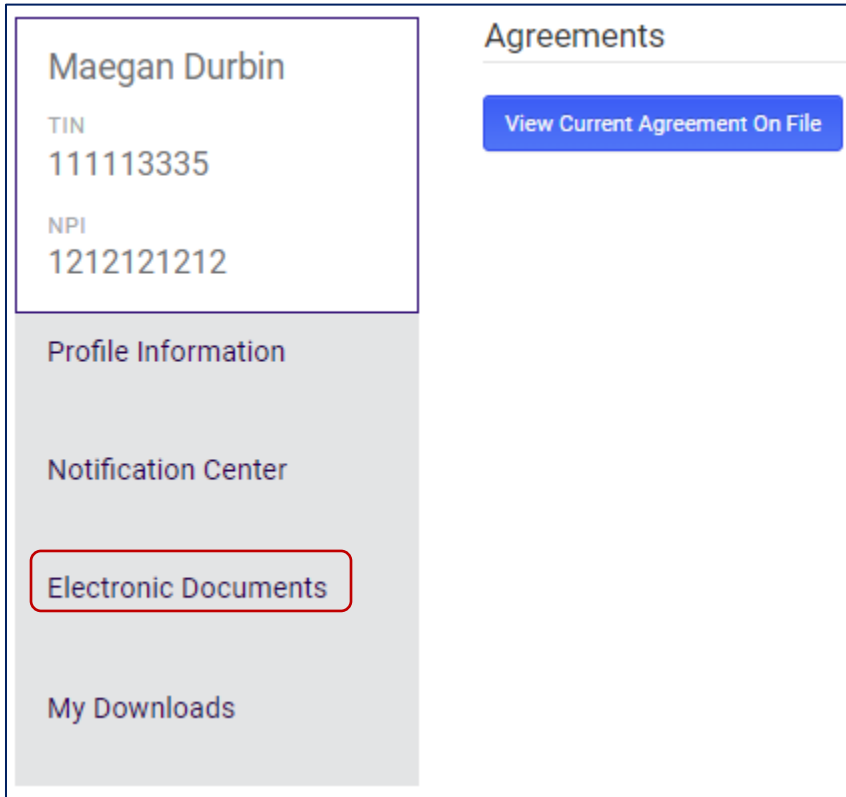
- Daily Transaction Summary
- Transaction Summary
- Transaction Summary By Payer

Profile Settings (My Profile)

Access the *My Profile* page from the dropdown below your name, in the top-right corner. While many features within My Profile are available to other staff logins, only administrators can access the Electronic Payments screen.

Electronic Documents

The *Electronic Documents* section will only be visible to those with administrative privileges. This section provides access to the current contract on file, via the “View Current Agreement on File” button.







The screenshot displays a user profile interface. On the left, a white box contains the name 'Maegan Durbin', TIN '111113335', and NPI '1212121212'. Below this is a grey sidebar with menu items: 'Profile Information', 'Notification Center', 'Electronic Documents' (highlighted with a red border), and 'My Downloads'. On the right, the 'Agreements' section features a blue button labeled 'View Current Agreement On File'.

Single Sign-On (SSO) Requests

The Single Sign-On feature allows you to access multiple tax ID numbers (TINs) using a single username and password.

If you have multiple accounts with Zelis®, you may choose to pull them all into a single portal using Single Sign-On (SSO). When enabled, you will log in to the Primary account and be able to see payments and information for all the accounts that you have tied to the Primary. To request Single-Sign On be applied to your accounts, please contact Zelis® Client Service at 877-828-8770.

Reminders

-  All accounts requested must be enrolled in a Zelis® electronic products (Consolidated Check Accounts do get Portal Access).
-  All users must be logged into the portal under the primary account associated with the Single Sign-On (SSO), and the user must have the permission "Access to Subordinates" checked to view all accounts associated with the SSO.
-  The Administrator for the primary account oversees all other users' permissions and granting them access to the other accounts.
-  When the user is viewing the secondary accounts, it is "Read Only" as they can only view and download the payment data if deemed appropriate by the Administrator. No changes can be made to another account while logged in under the Primary account.