Payments Portal: Administration

Training Guide

Texas Children's® Health Plan

zelis®

Table of Contents

(Click in the TOC below to jump to a topic)

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

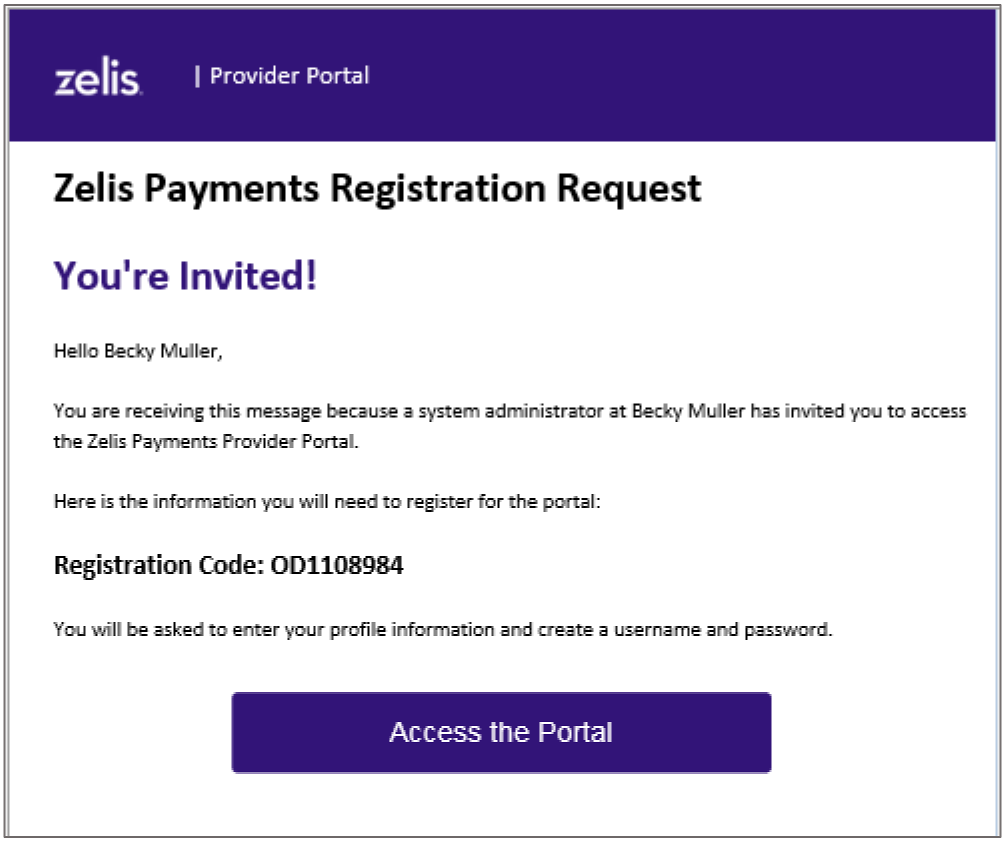
There is no pre-requisite knowledge needed prior to using this guide.

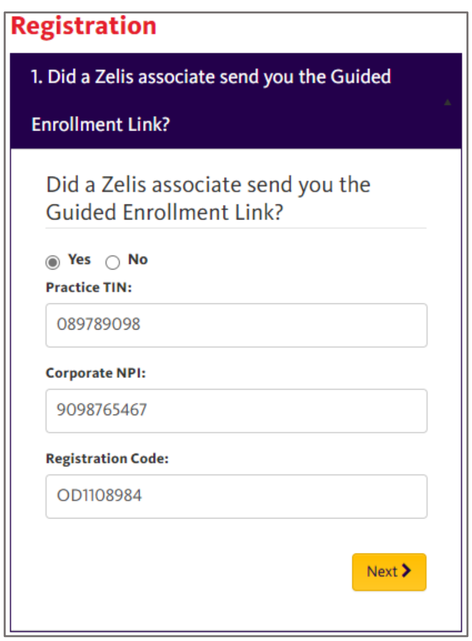
Access Details

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.



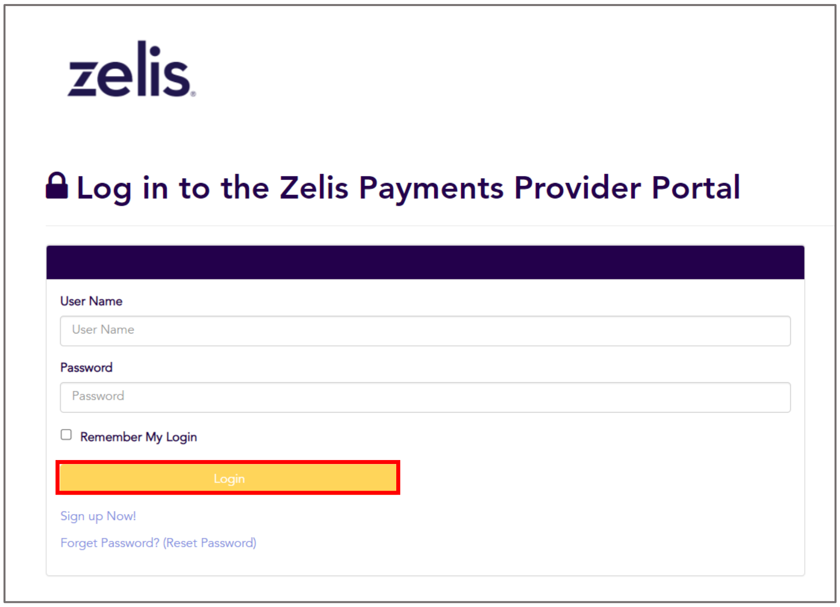


1. The Portal will ask you to confirm your business' TIN, NPI and Registration Code (from the email). Once confirmed, click **Next**.
2. You will then be prompted to create a **Username**.
3. After you create a Username, for security purposes, you will receive a separate email with a link to create your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

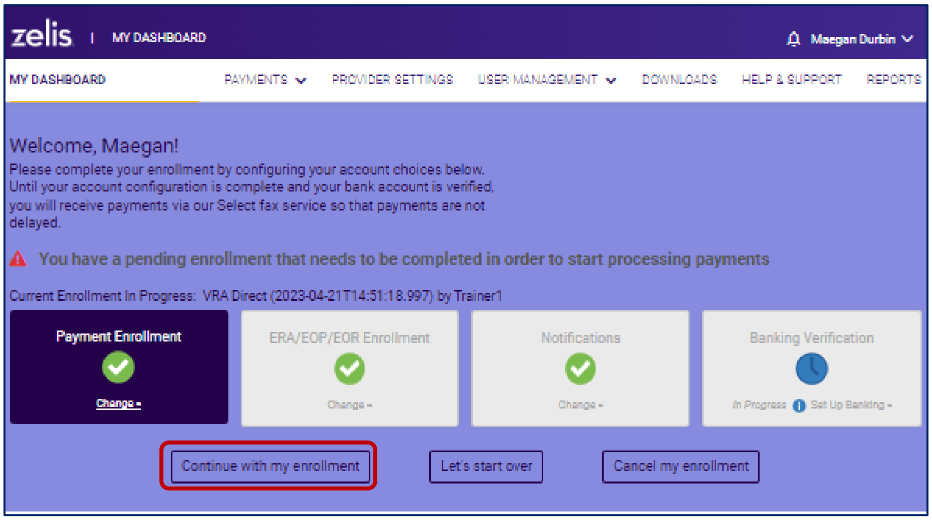
Accessing the Portal

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



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

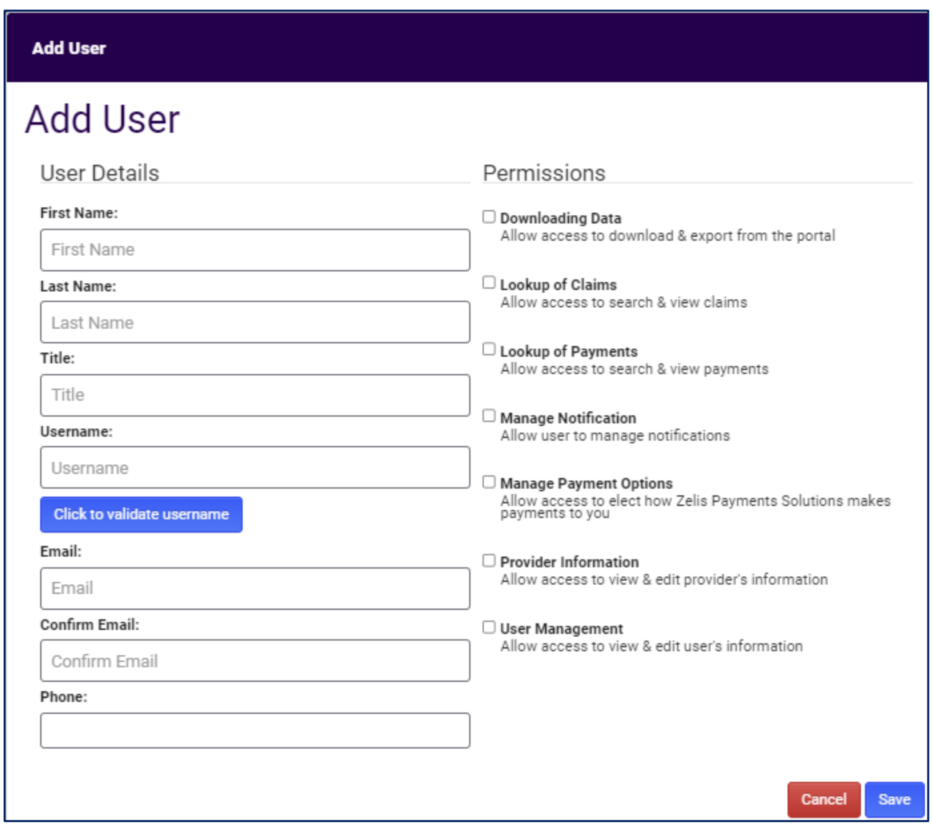
The User Management screen enables you to create and update accounts as needed.

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.



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

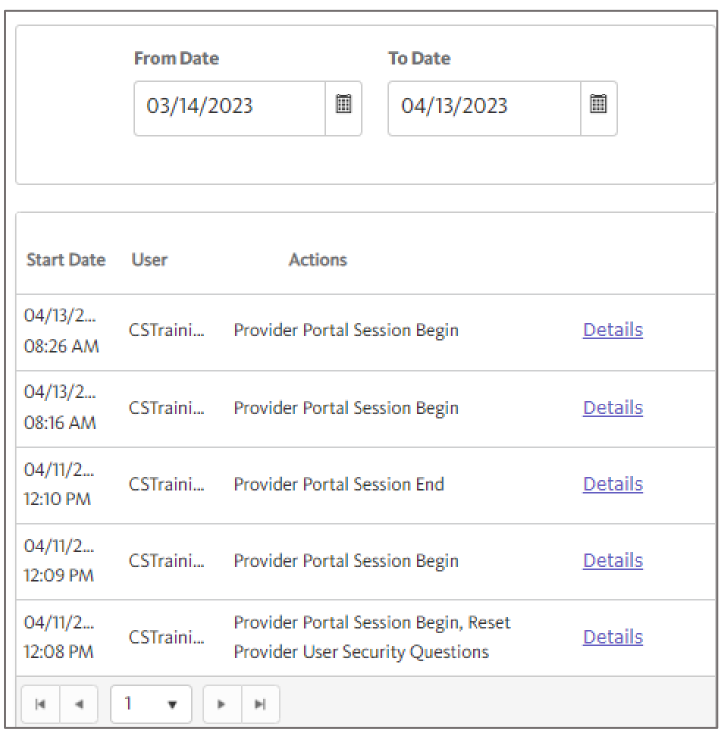
Not only can you create users and define their privileges, but you can assist in troubleshooting their access, by clicking the Reset link to the right of a user's account.

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

- **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.

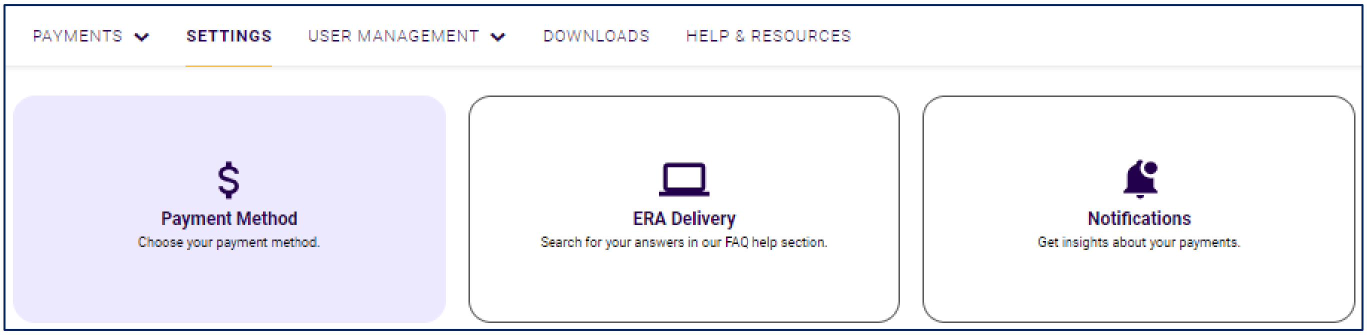
User Activity

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.



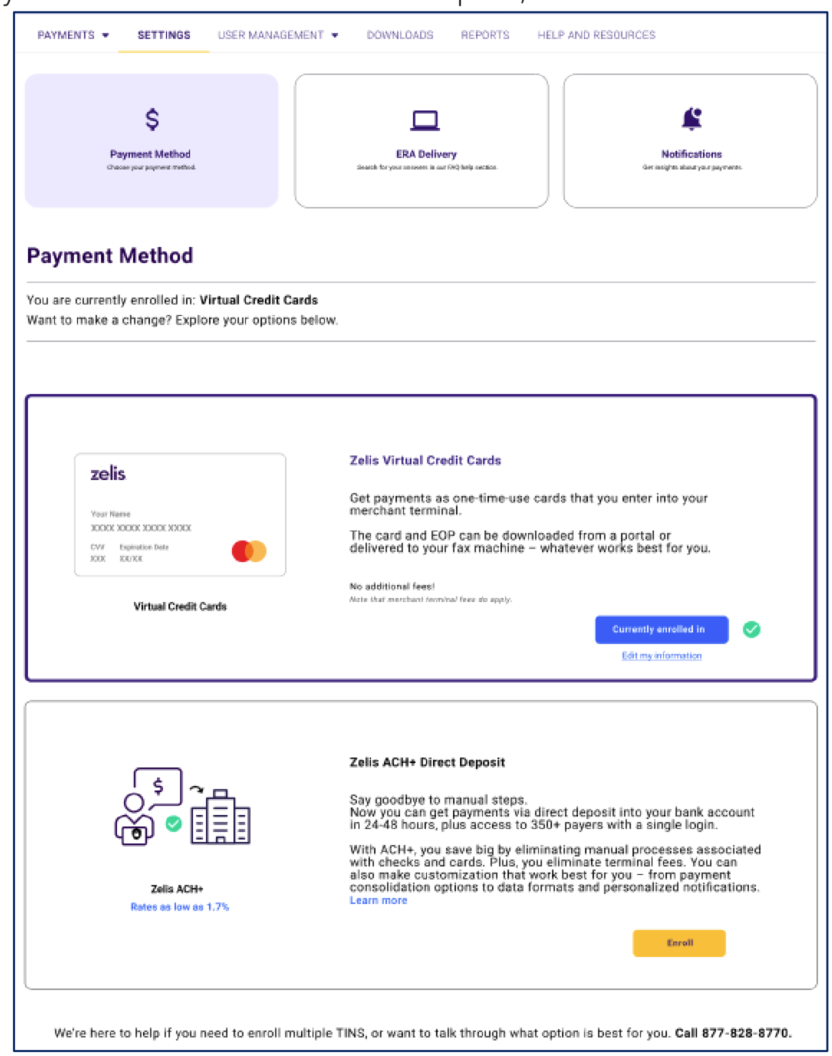
Settings

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

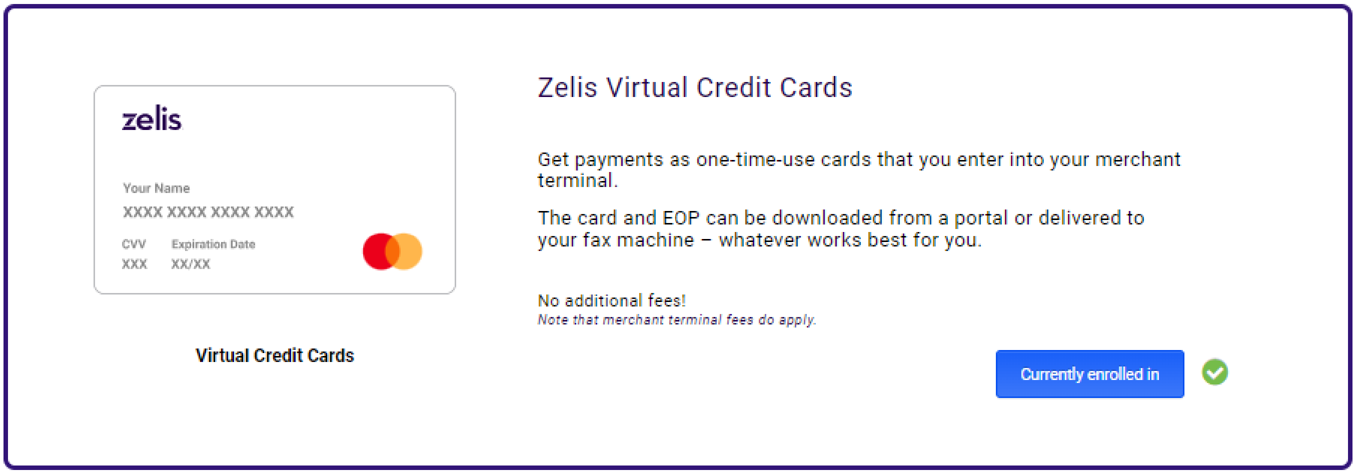
The *Payment Method* section shows what you are currently enrolled in and provides the option to enroll in ACH+ Direct Deposit and Virtual Credit Card (VCC*)*. Enrollments must be done by the Authorized Decision Maker. If you are enrolled in ACH+ Direct Deposit, this is also where banking information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



Jump to TOC

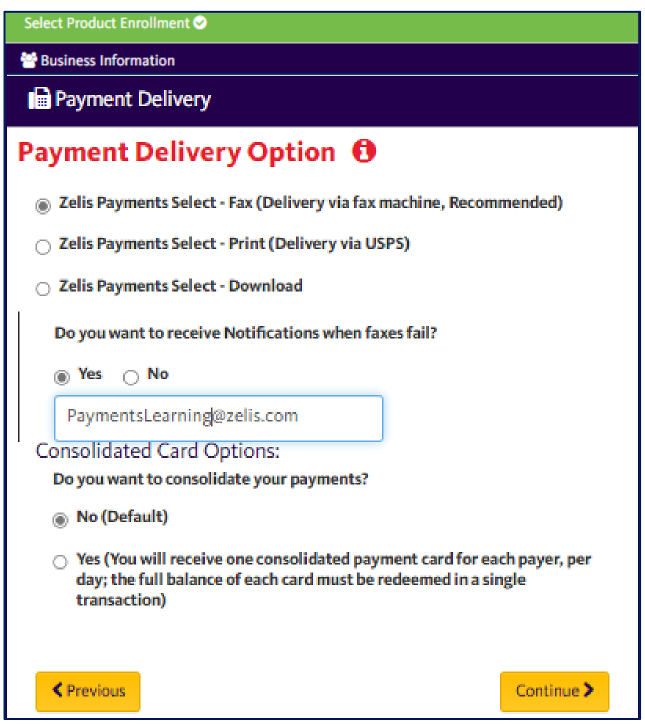
Zelis® Virtual Credit Card Enrollment

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.



How to enroll/update in Zelis® Virtual Credit Cards

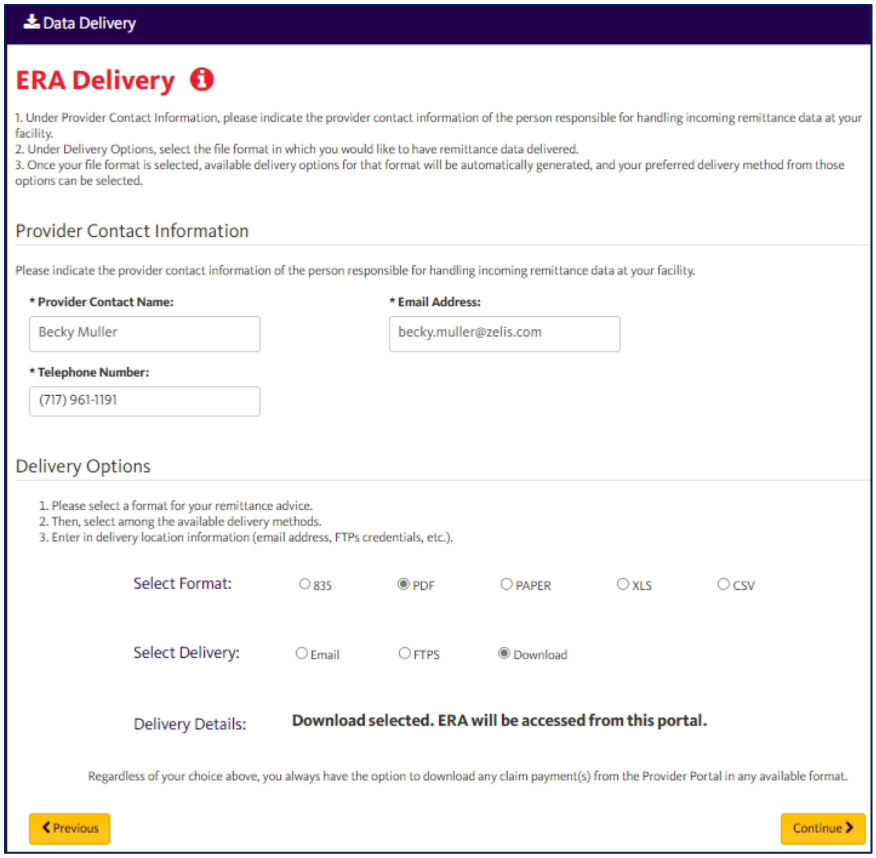
1. Open the **Settings page > Payment Information section.**
2. Within the **Zelis® Virtual Credit Cards box**, click the **Enroll** or **Currently enrolled in** button.
3. Click **Yes** to the confirmation that appears.



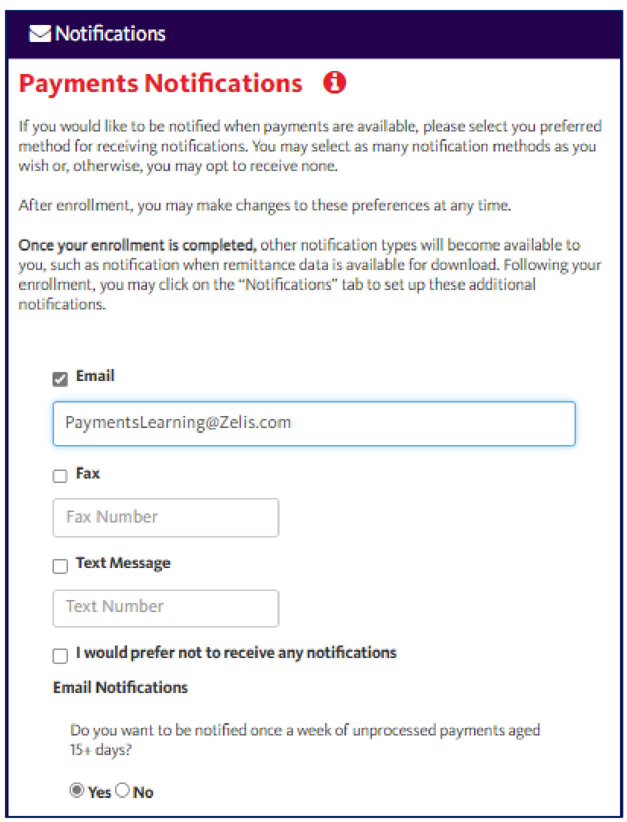
4. In the *Business Information* section, complete the required fields (if changes are needed); and click **Continue**.

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.**

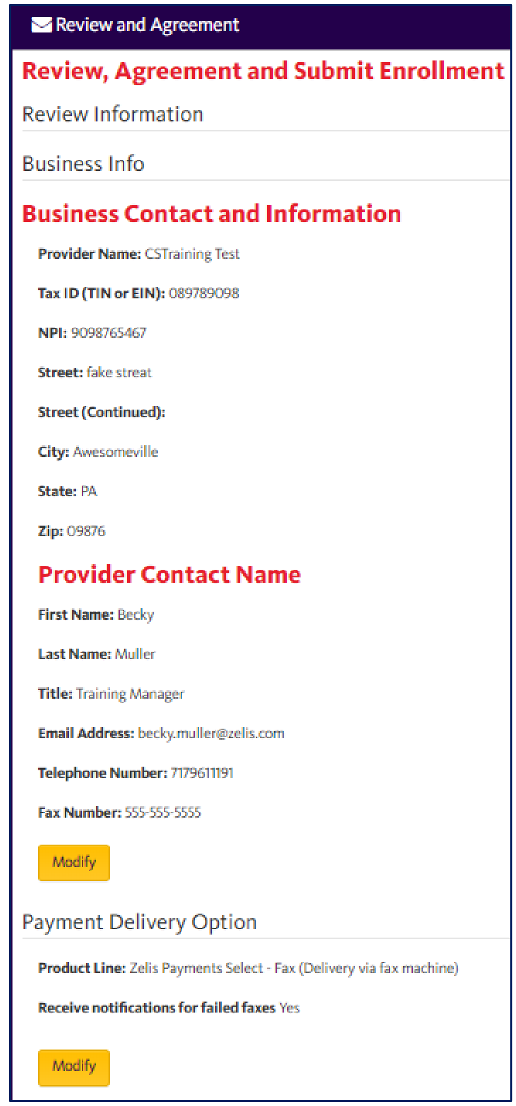
6. In the *Data Delivery* section, complete the required fields and the desired **delivery option**, and then click **Continue**.

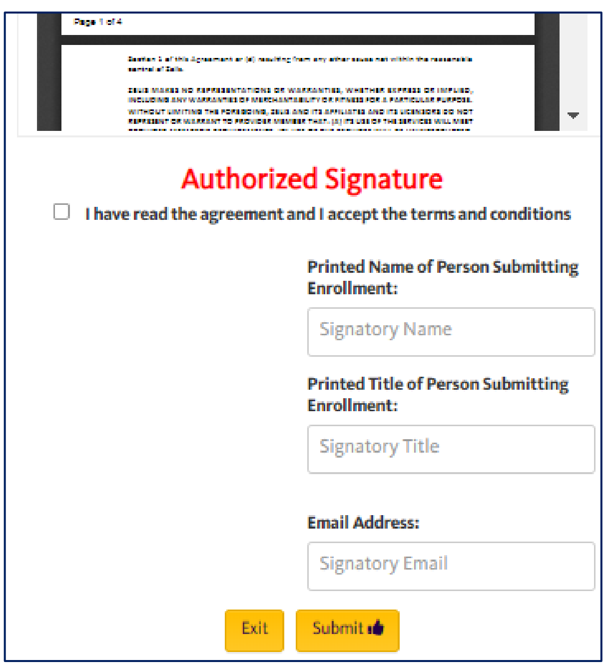


7. In the *Notifications* section, select the desired payment notification method, if any, and click **Next**.



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



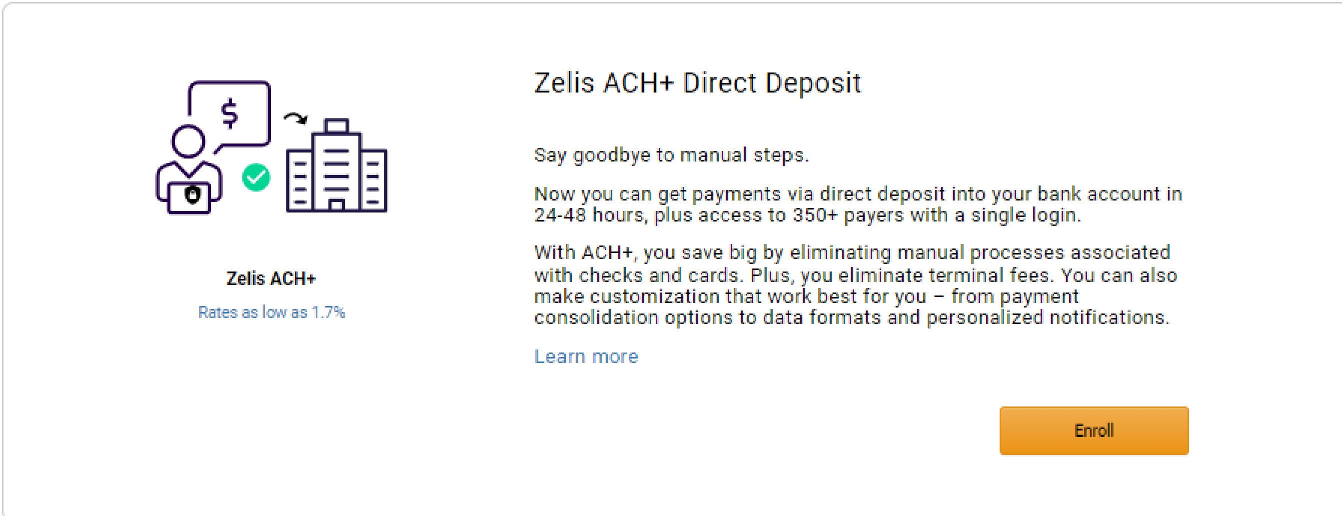


9. Then, when all is accurate, **sign the contract per the terms**, and click **Submit**.

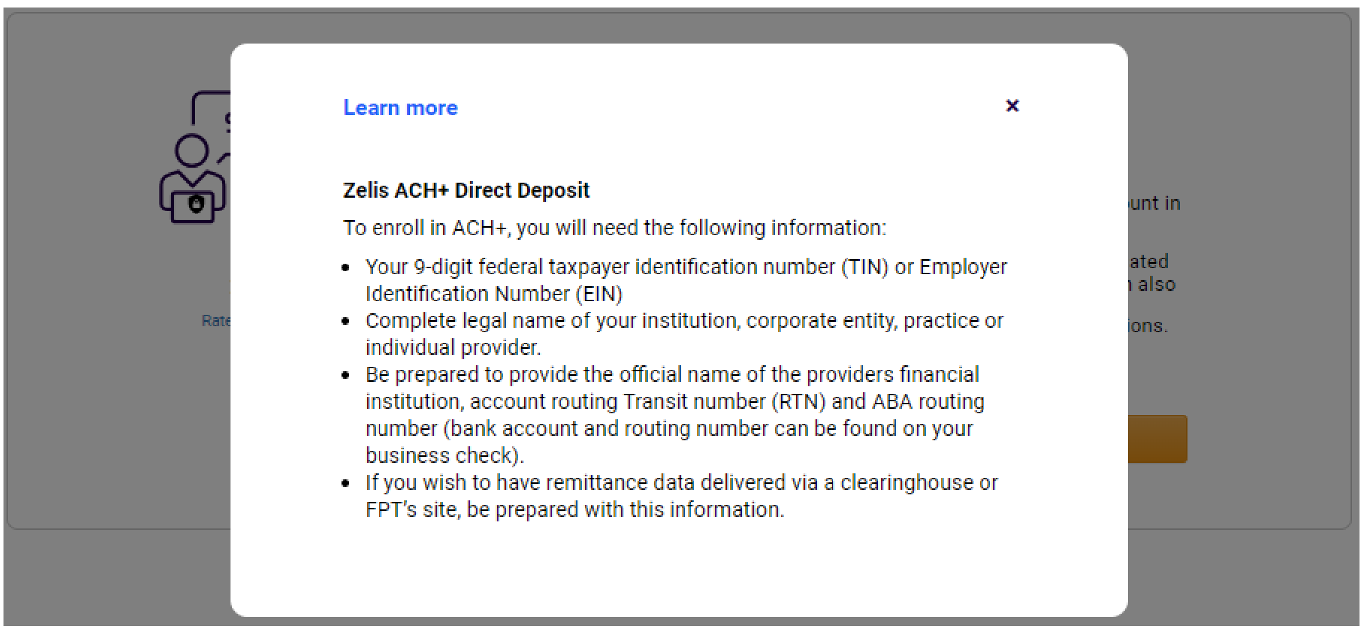
The account will automatically be enrolled in the new product and the very next payment file received will be issued via the new enrollment type.

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.

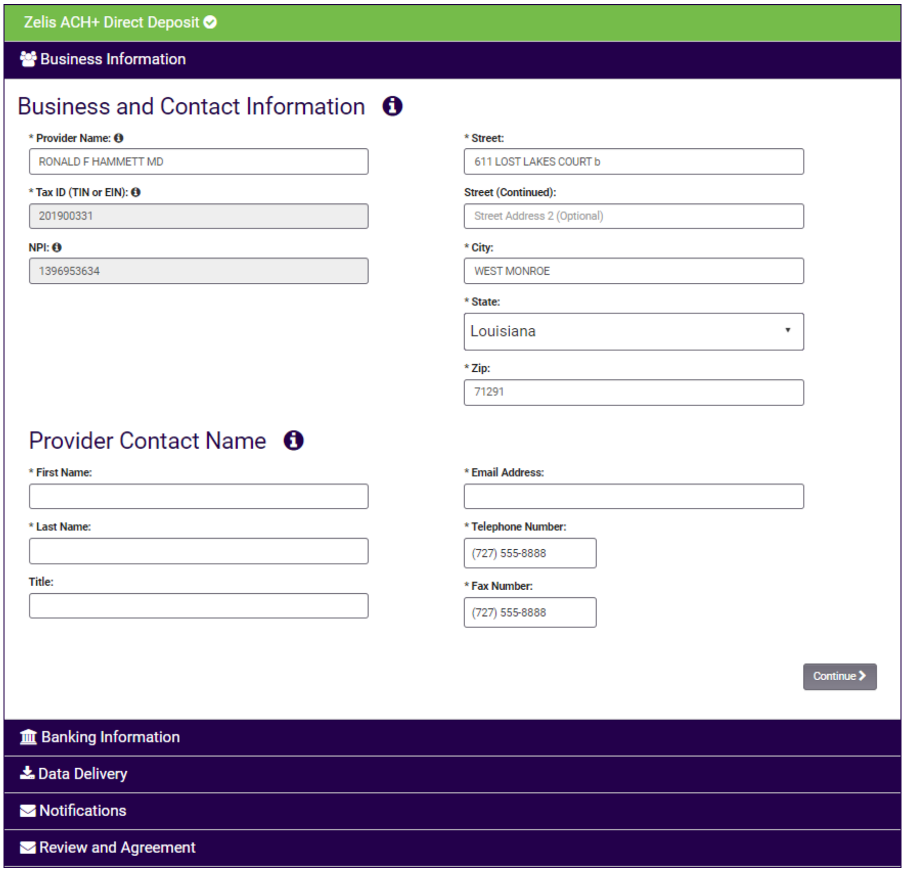


You can click "Learn more" to learn about the steps involved.



Enrolling/Updating ACH+ Direct Deposit

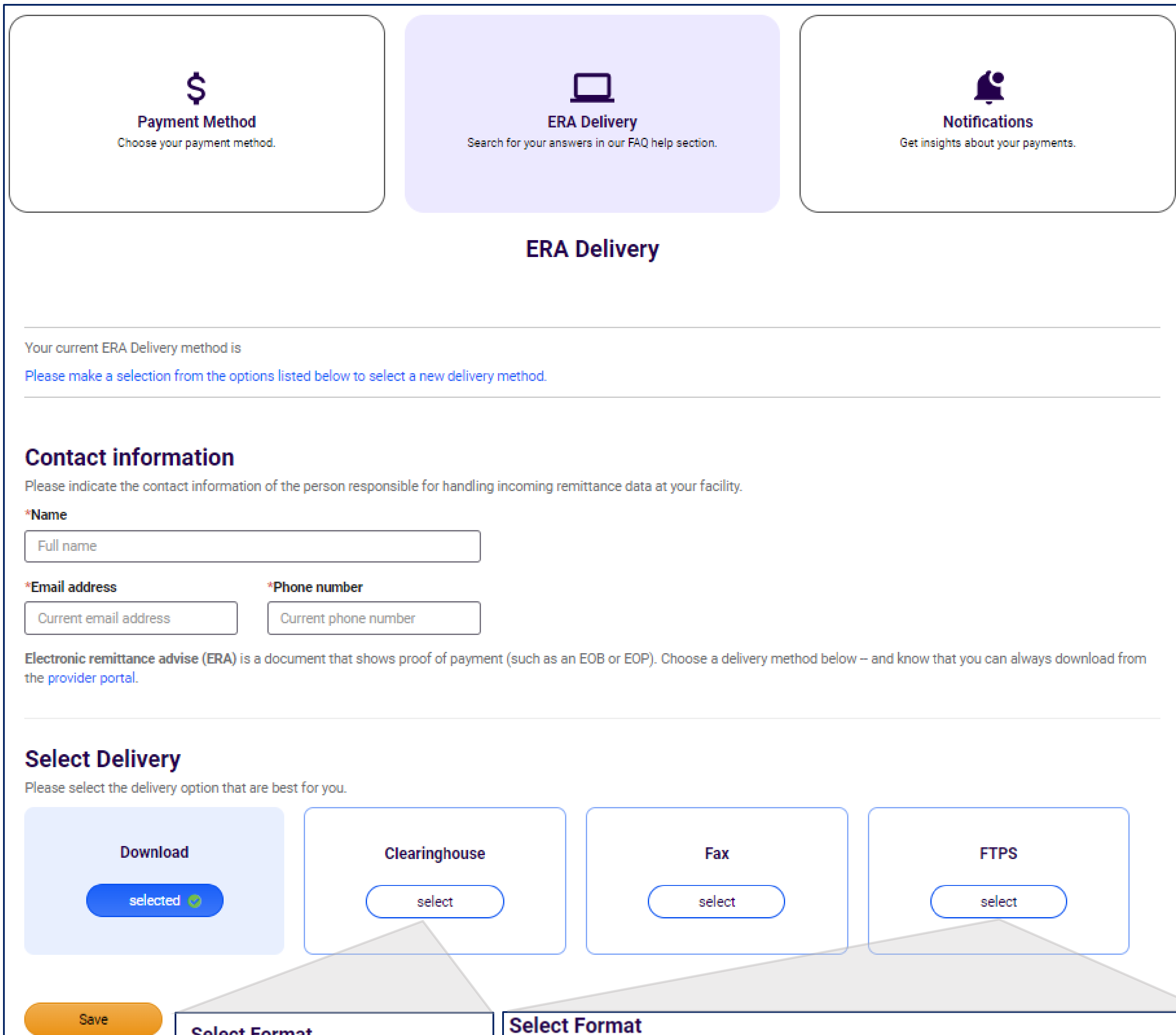
1. Open the **Settings page > Payment Information section.**
2. Within the **Zelis® ACH+ Direct Deposit box**, click **Enroll or Currently enrolled in**.
3. Click **Yes** to the confiration that appears.

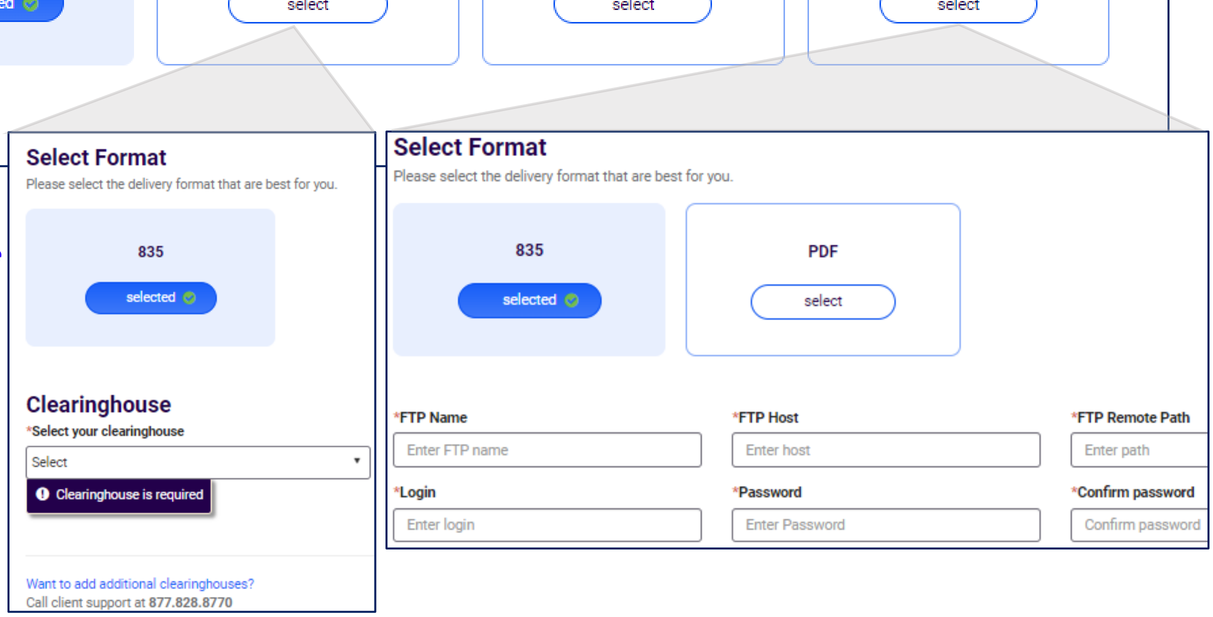


4. Follow through the enrollment pages until you reach the Review and Agreement page where you will sign and submit the contract. Please note that updating banking information will result in a pre-note and verification process that can take up to 10 business days.

ERA Delivery

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

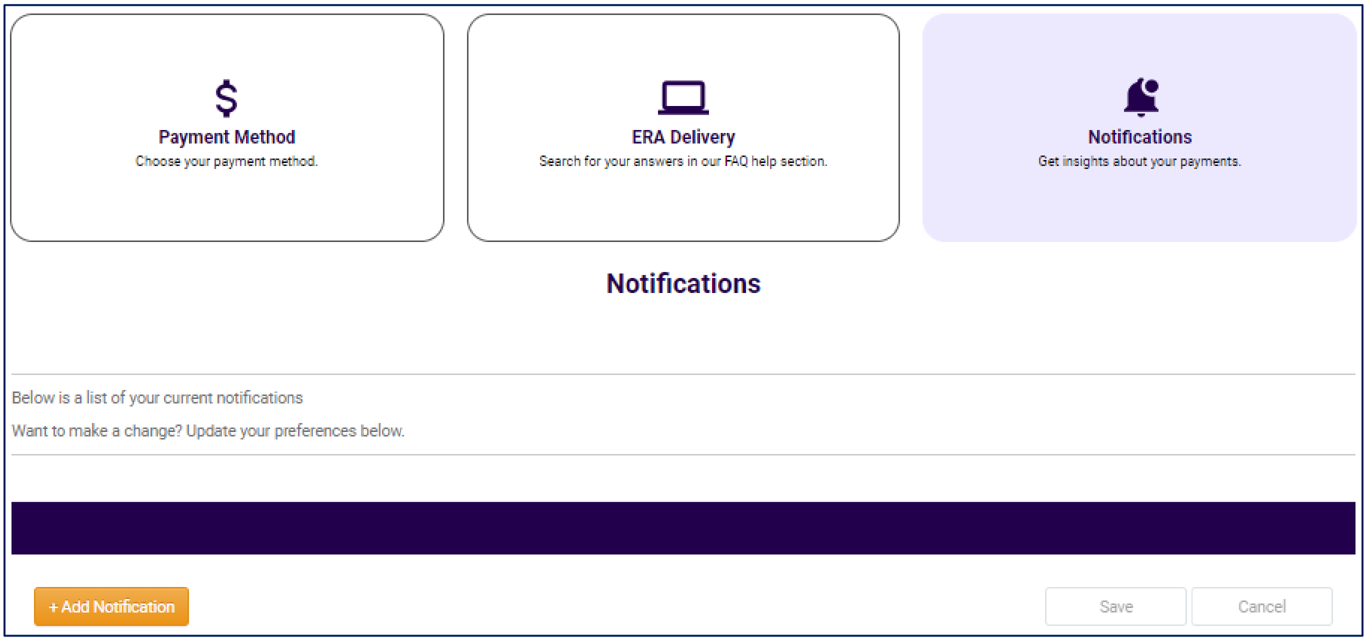




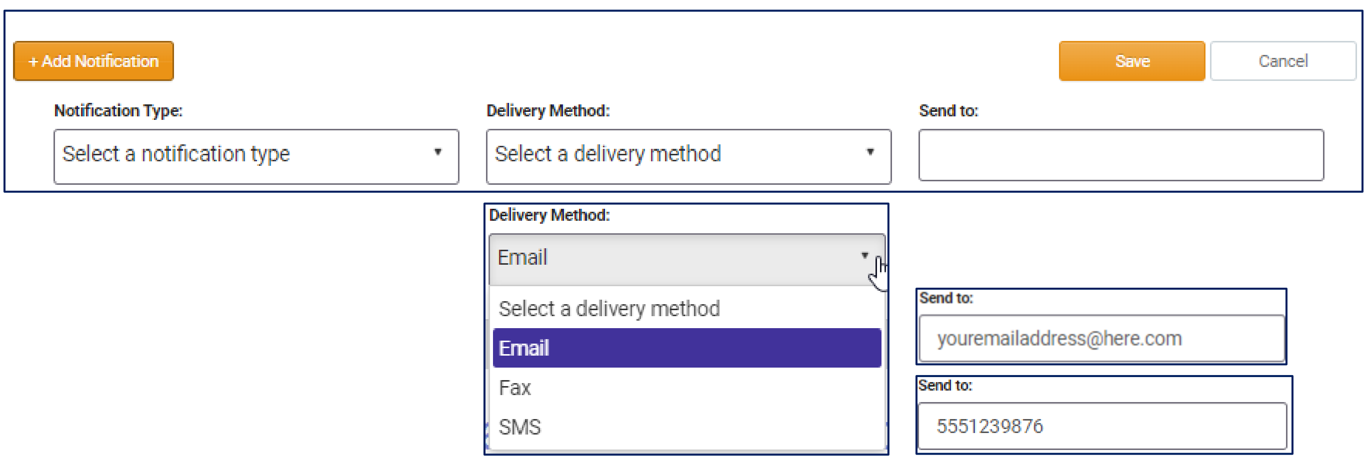
While "Download" and "Fax" are obvious, note the options available for "Clearinghouse" and "FTPS".

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.

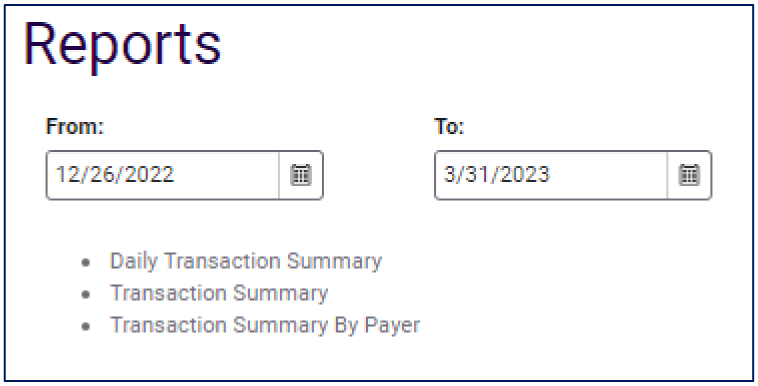


Adding notifications is as easy as clicking **+Add Notification,** selecting the **Notification Type** (currently only one option), **Delivery Method** and filling in the **Send To field** (email or phone number). Once you have notifications in place, you will see the option to edit or delete.



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.

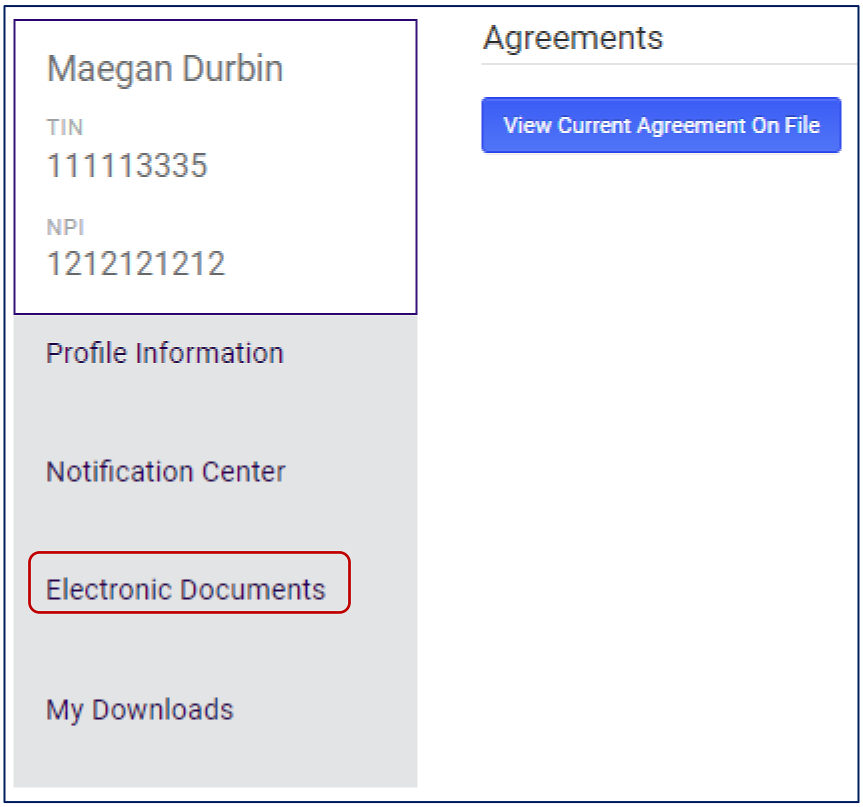


Profile Settings (My Profile)

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.



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.