Payments Portal

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 the Zelis® portal.

Within this guide, you will learn about:

- Accessing the portal
- The sections within the portal
- Troubleshooting
- Single Sign-On Accounts

Pre-requisites

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

Access Details

If you do not already have access to the portal, your Authorized Decision Maker can contact Zelis® to create your portal. Once created, that administrator can manage logins for your organization.

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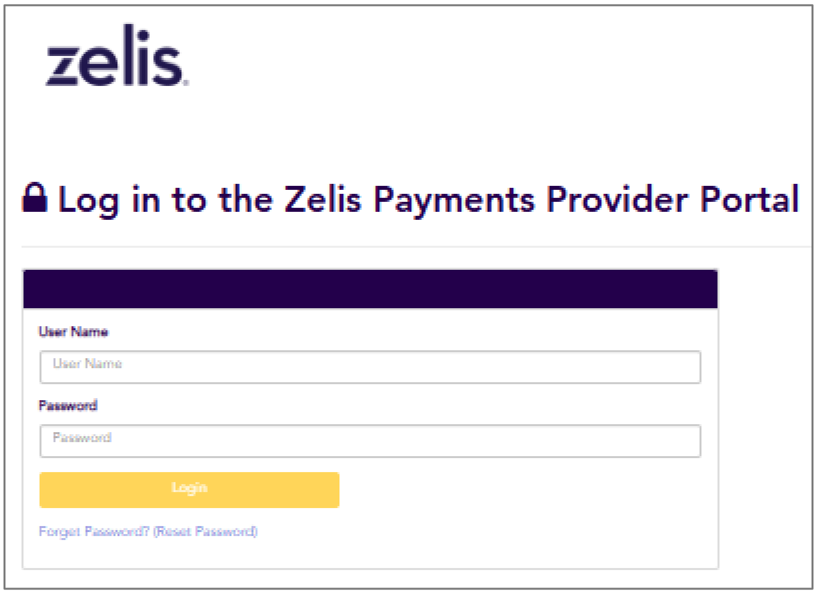
Accessing the Portal

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



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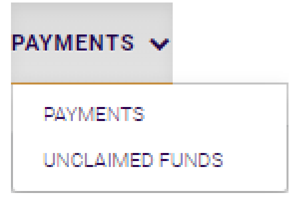
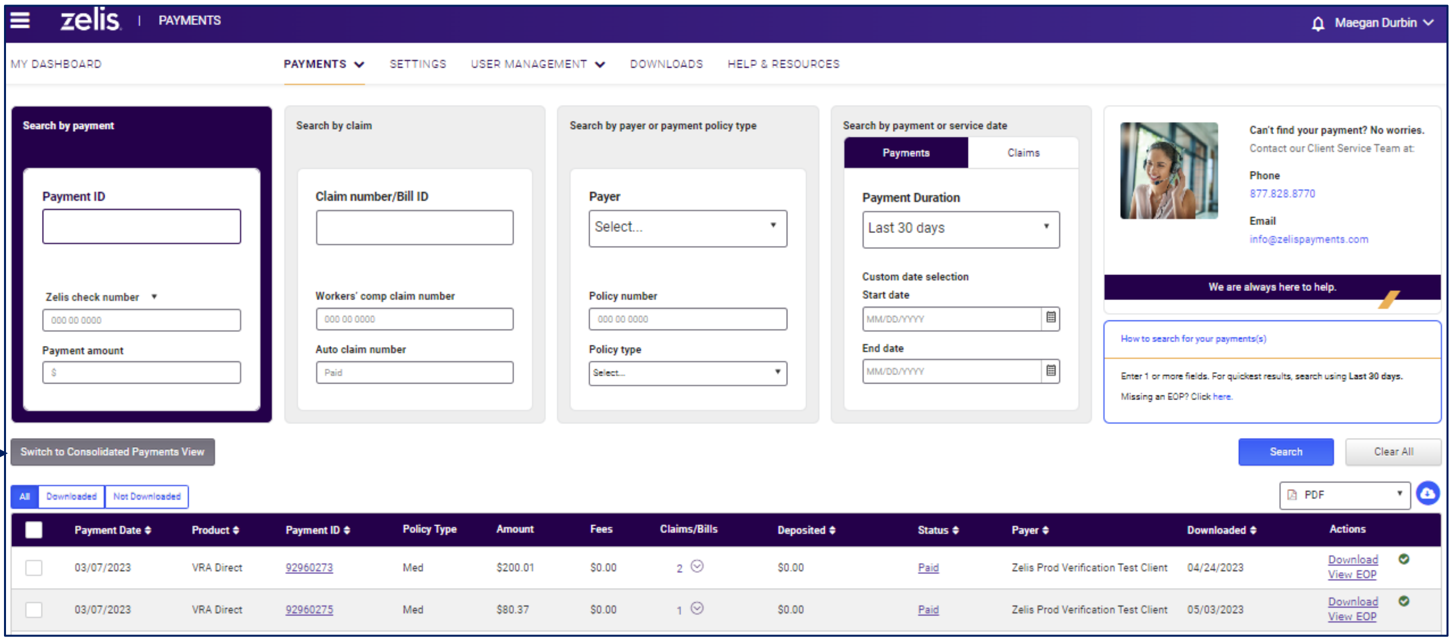
Searching for Payments

The *Payments* menu provides the option to view payments or unclaimed funds.



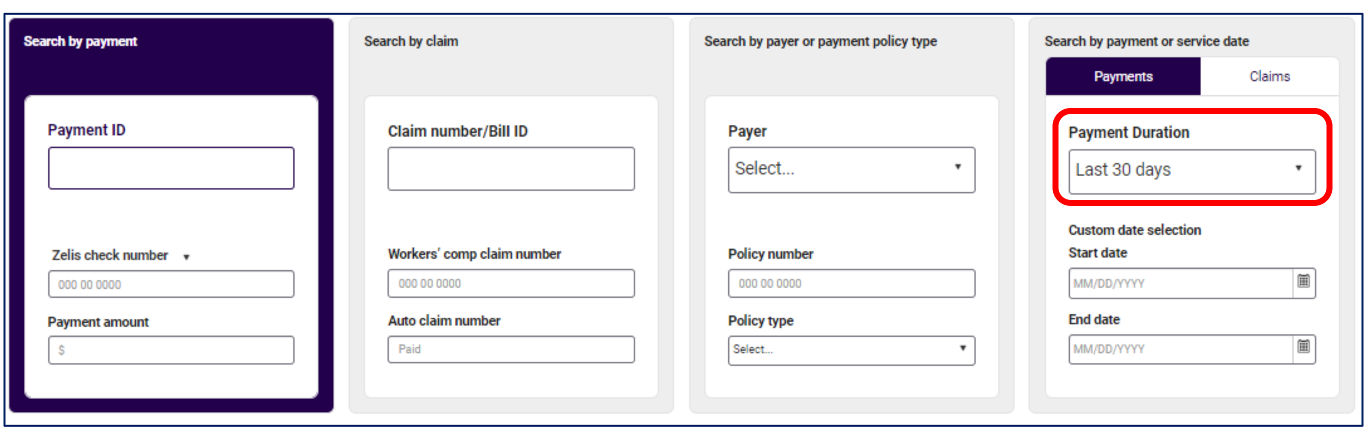
Payments

The *Payments* page enables you to search for your payments in a number of convenient ways. The payment details and EOP are all accessible here.



If you take advantage of consolidated payments, you can click the button just above your results to view results as "Consolidated Payments" or switch back to individual "Claim Payments".

Several user-friendly search categories are available to help you search based on the information you have available – payment, claim, payer, payment type or date. You can enter search criteria in just one field or enter many fields to narrow your search. Your search defaults to payments from the "Last 30 days" to generate the quickest results. However, you can select payments in the "Last 30, 60, 90 Days or All".



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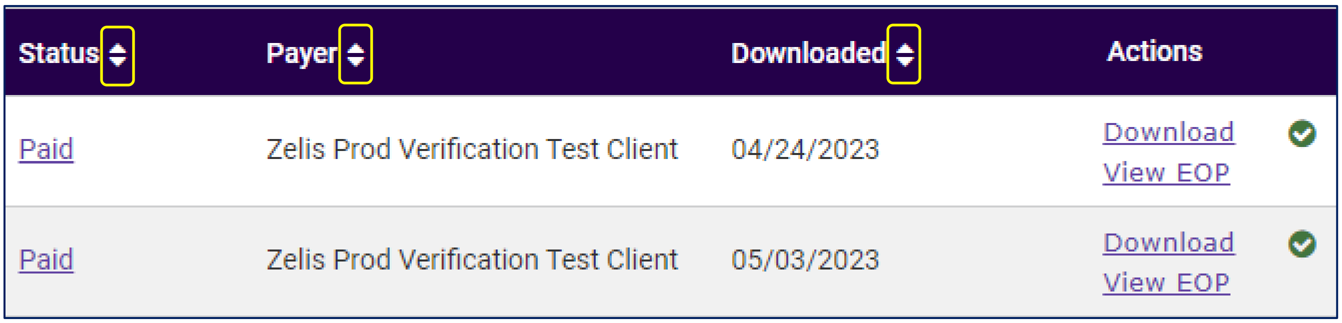
You can also use the toggle button to see only payments you have or have not downloaded.

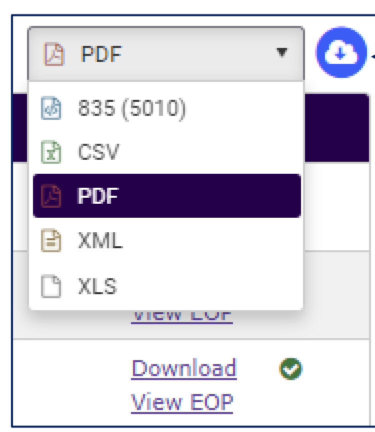
Also, note that many of the columns are sortable by clicking the column name. This makes it easy to sort by Date, Status, Payer, etc.



The "Payment ID" and "Status" column's hyperlinks provide payment details, while the "Actions" column link provides the option to download the Explanation of Payment (EOP). Clicking within the "Claims/Bills" column will provide the details of the claims paid by that payment.

Note that downloading multiple EOPs – or an EOP that has many pages – will result in a batch download that may take some time to process. You will be notified when your download is ready.

Above the list of results, you can select the desired format, such as PDF. Your last selection will remain your default, although you can change it at any time by clicking the drop-down arrow. This is especially useful for batch outputs to Excel (CSV) or exporting to ERA (835).



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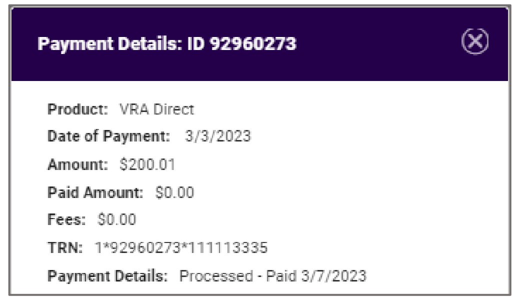
Payments Columns

Payment Date – When the payment was processed/settled.

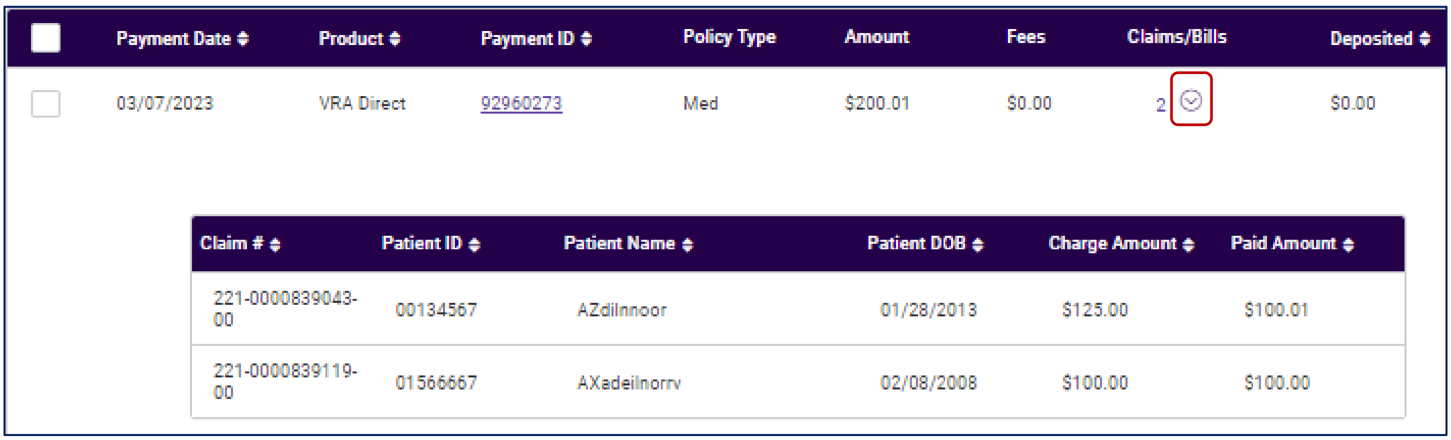


Product – What type of payment it is.

Amount – How much was paid.

Fees – Zelis® fees deducted from the payment (*if applicable).*

Claims/Bills – The number of claims within the payment; the dropdown arrow displays a list of claims associated with the payment.



	Payment Date	Product	Payment ID	Policy Type	Amount	Fees	Claims/Bills	Deposited
	03/07/2023	VRA Direct	92960273	Med	$200.01	$0.00	2	$0.00

Claim #	Patient ID	Patient Name	Patient DOB	Charge Amount	Paid Amount
221-0000839043-00	00134567	AZdilnnoor	01/28/2013	$125.00	$100.01
221-0000839119-00	01566667	AXadeilnorrv	02/08/2008	$100.00	$100.00

Deposited – Displays the amount Zelis® deposited into the account or how much of the payment was processed (payment accepted) from the Virtual Credit Card (VCC).

Status – Advises whether the payment is pending or has been fully paid. When clicked, opens to the same window as the Payment ID column's link.

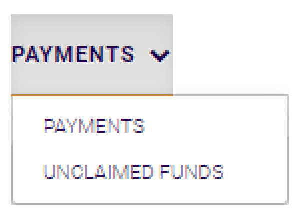
Payer – Displays the Payer that was billed for this payment.

Downloaded – This advises when/if the payment was downloaded.

Actions – "Download" enables you to Download the EOP. "View EOP" simply opens the EOP for viewing within the frame.

Unclaimed Funds

Unclaimed funds, also known as escheatment, occur when a financial institution hands over unclaimed property to the state. In other words, if we issue you a check and it is not deposited for three years, it will become an unclaimed fund which, by law, will eventually be sent to the government.



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How to Download VCCs, ERAs, and Batches

You can verbally walk a provider through these steps or email them the instructions (if able/permitted).

Verbiage:

Rep: Thank you for contacting Zelis® Payments. We are sorry that you are having trouble with your downloads.

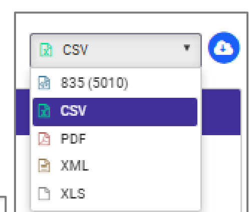
Tips to Advise:

- Please confirm you are in the "Downloads" tab, not "Payments" tab.
- Update "Select Download Format" to CSV or XLS (whichever not attempted).
- A batch folder should populate including 2 files. One for the Payment Card and another for the EOP.
- A batch download should populate as an Excel spreadsheet. Open the spreadsheet completely to view full card details (if downloading VCCs).

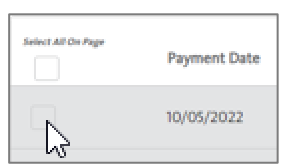
How to Download VCCs

1. **Navigate** to the top of the portal screen, then **click** on the *Downloads* option.
2. A drop-down menu appears, with some options **click** on the *Virtual Card Downloads* option.

3. To the right of the screen, above the payment results, there is a drop-down menu that indicates the format of the document needing downloaded. Choose which formatting you want for the downloads.



4. **Select the payment you wish to download** by clicking on the box to the left of the payment date; or clicking all on the page check the top box in that column.



5. Click the download icon on the right of the format drop-down field.

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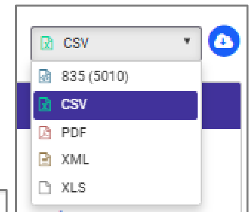
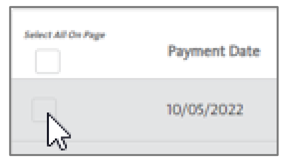
How to do Batch Downloads

1. **Navigate** to the top of the portal screen, then **click** on the *Downloads* option.
2. A drop-down menu appears, with some options **click** on the *Batch Downloads* option.

3. To the right of the screen, above the payment results, there is a drop-down menu that indicates the format of the document needing downloaded. **Choose** which formatting you want for the downloads.

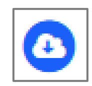


4. **Select the payment you wish to download** by clicking on the box to the left of the payment date; or clicking all on the page check the top box in that column.

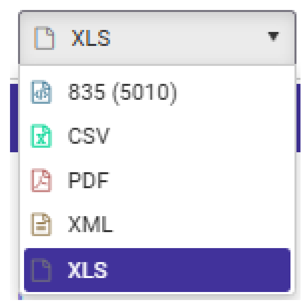


5. **Click** the download icon on the right of the format drop-down field.

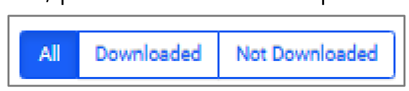
   A batch folder should populate including 2 files. One for the Payment Card and another for the EOP.



6. The payment(s) should populate as an Excel spreadsheet. Open the spreadsheet to view full card details.
7. **If the files are blank**, go back to the step 1 and update the "Select Download Format" to XLS and follow the directions again.



8. If you still do not see the payment, please click on the option of 'Not Downloaded' at the top of the payments results.



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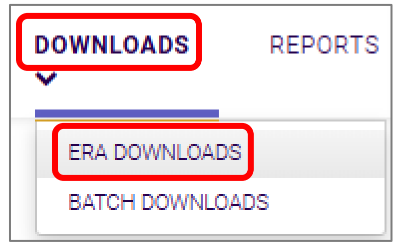
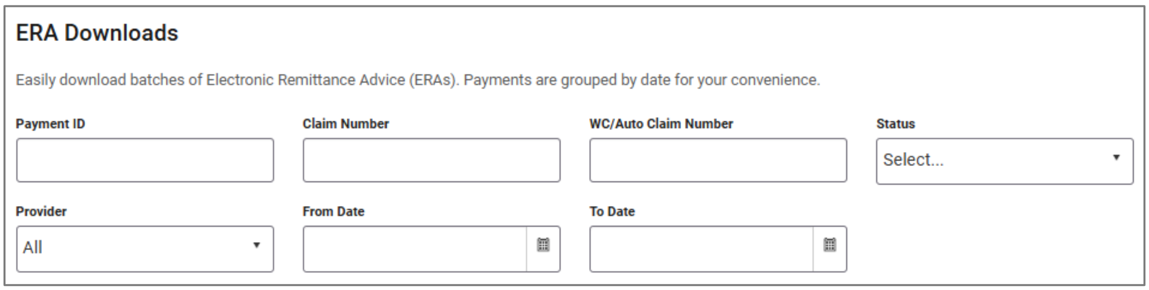
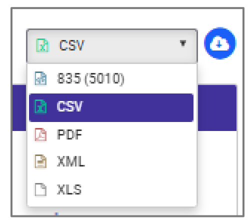
How to Download ERAs

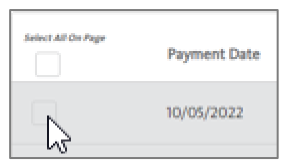


1. **Navigate** to the top of the portal screen, then **click** on the *Downloads* option.
2. A drop-down menu appears, with some options **click** on the *ERA Downloads* option.
3. Filter to find the ERAs that are needed.

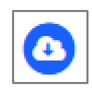




4. To the right of the screen, above the payment results, there is a drop-down menu that indicates the format of the document needing downloaded. **Choose** which formatting you want for the downloads.
5. **Select the payment you wish to download** by clicking on the box to the left of the payment date; or clicking all on the page check the top box in that column.



6. **Click** the download icon on the right of the format drop-down field.



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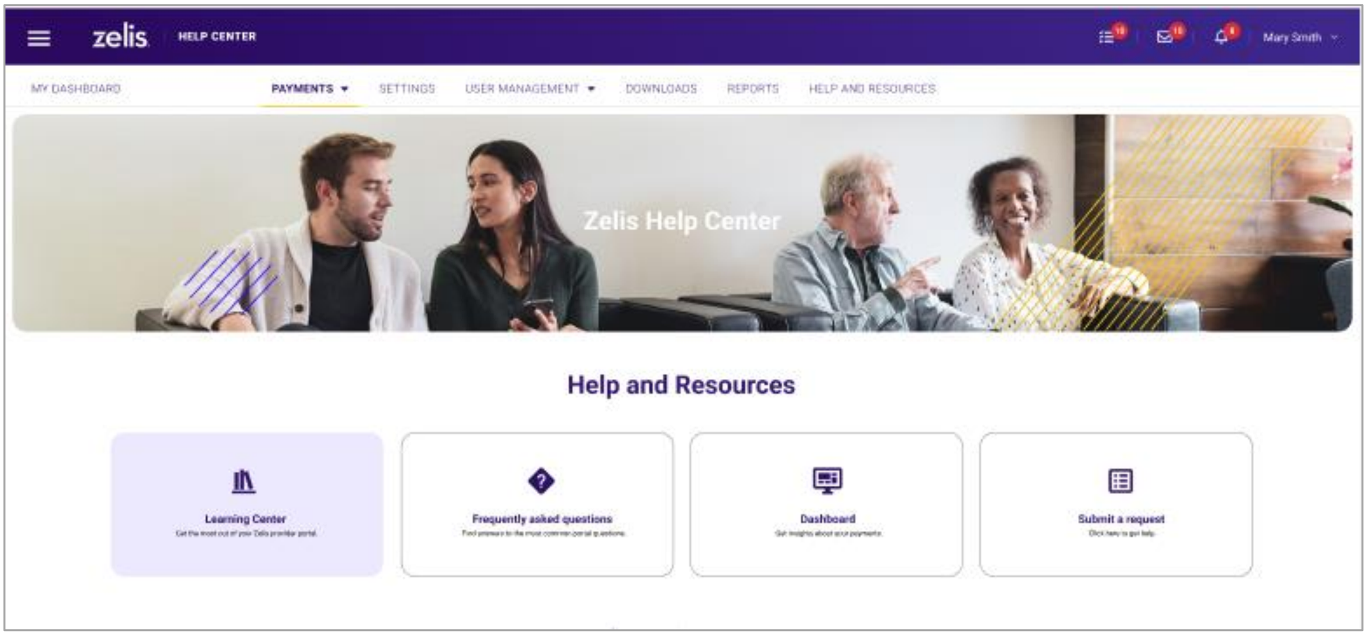
Help & Resources

The *Help & Resources* page provides information about Zelis®, along with helpful tools and resources to assist in navigating and troubleshooting the portal.



Learning Center

The Learning Center section provides helpful links, videos and training guides for your team.

FAQs

The *FAQ* section provides answers to the most common portal questions.

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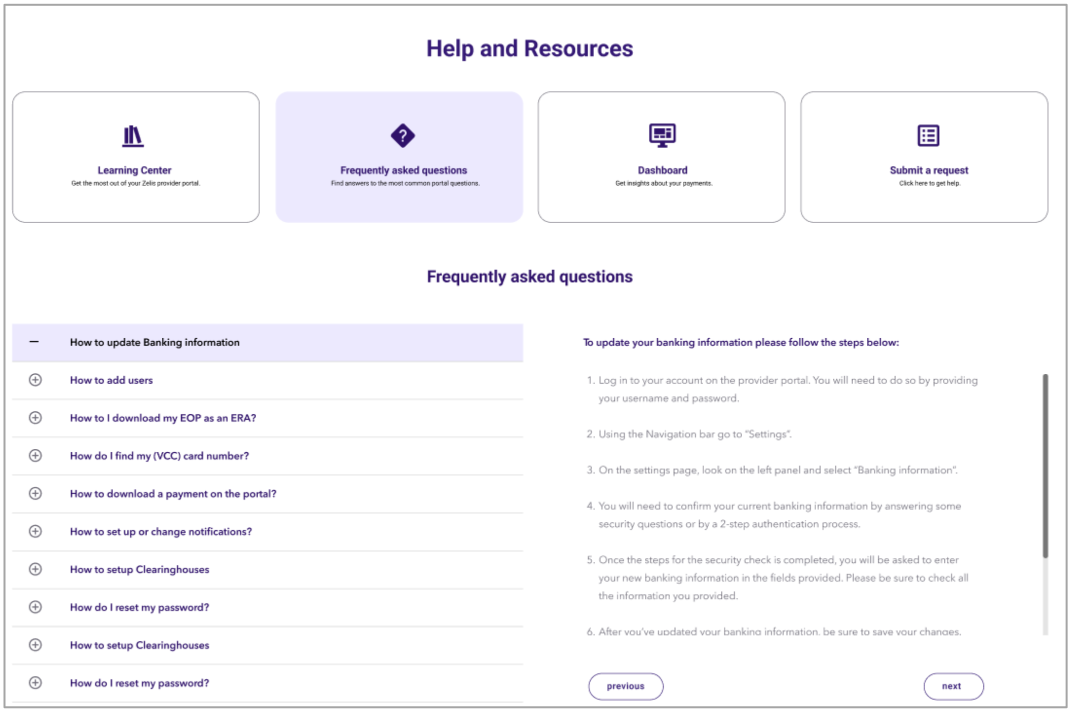

Dashboard

This will open a dashboard displaying payments over time. You can filter this screen by date or Payer.

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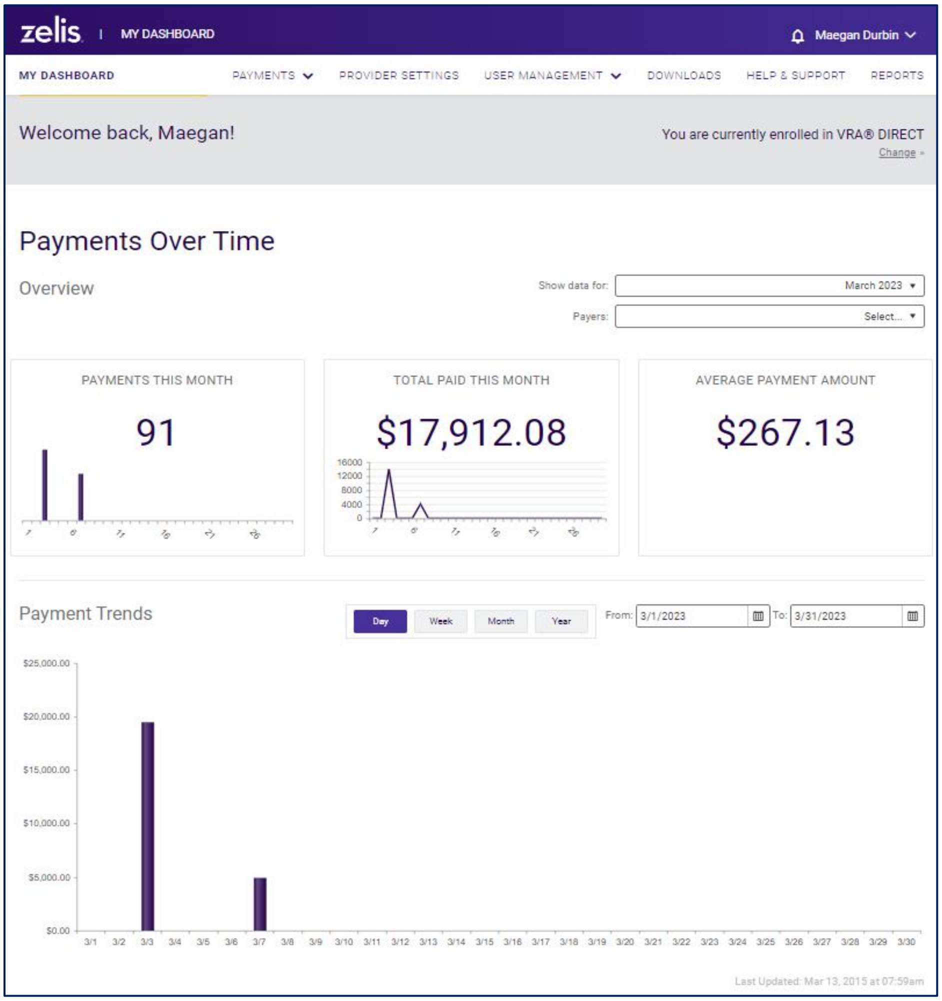
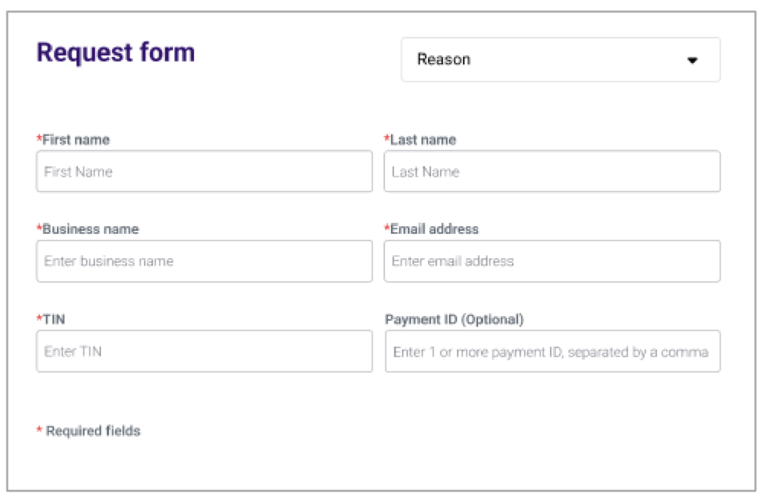


Submit a Request

Visit this page to get help with:

- Missing EOP
- Enroll in ACH+
- Access issues
- Enrollment status update
- Password reset
- Other



Please include as much information as possible so we can get back to you with a thorough response.

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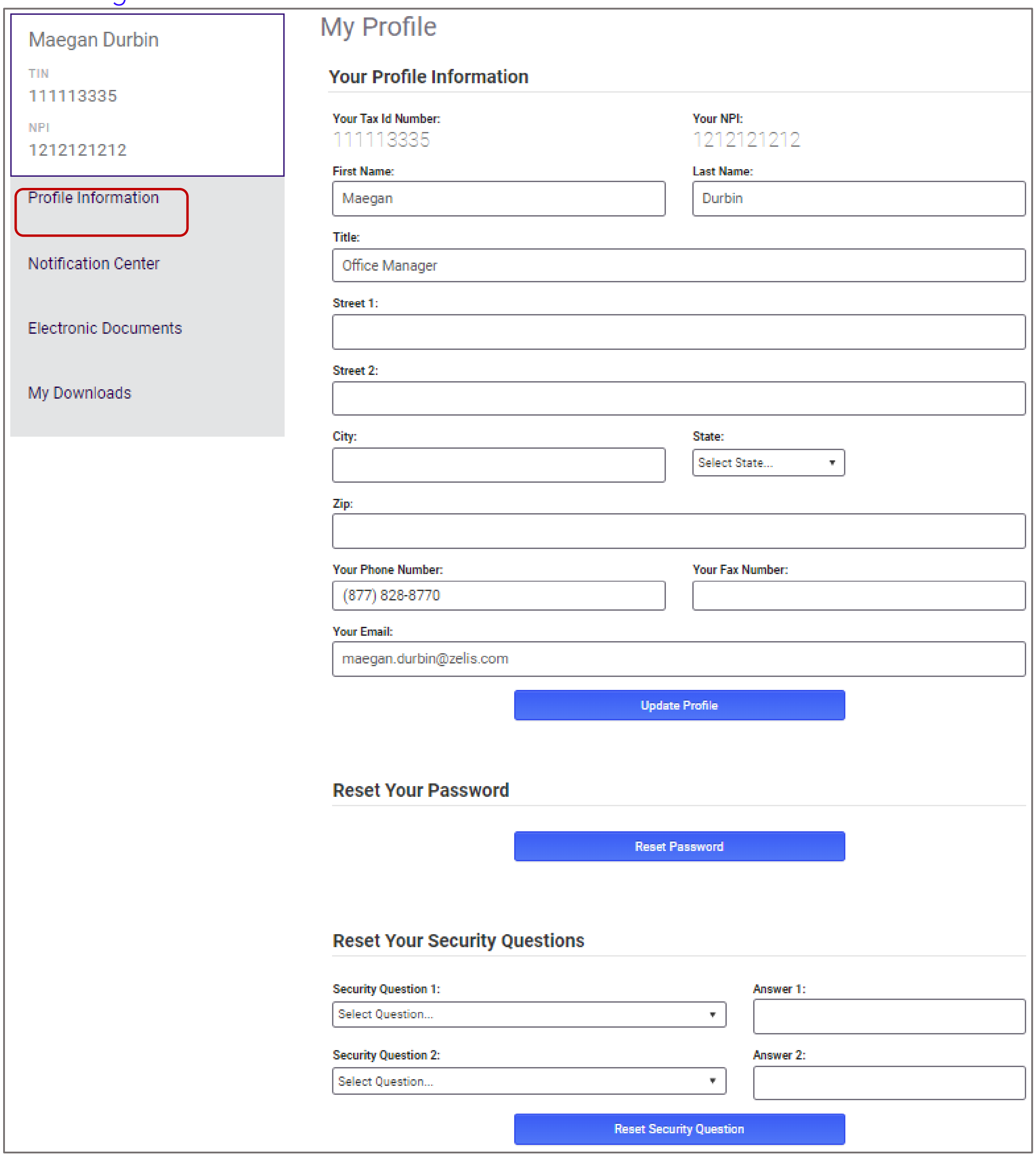
Profile Settings

Access the *My Profile* page from the dropdown beside your name, in the top-right corner.

Profile Information

By selecting *Profile Information*, you can update contact information and reset your password and security questions.

Your team's Admin can trigger a reset of your security questions, password, and MFA settings, if someone gets locked out of an account.



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Notification Center

The *Notification Center* section displays all notifications Zelis® has sent to your office (for those with the permission enabled to manage notifications).

Notifications

Date	Notification	Type
03/07/20...	Name: Burlington Labs, LLC Tax ID: 473	Provider Payment Alert
02/17/20...	Name: Burlington Labs, LLC Tax ID: 473	Provider Payment Alert

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Single Sign-On (SSO) Portal Accounts

If you have multiple accounts with Zelis®, your administrator can choose to tie them all together in one Provider Portal via Single Sign-On (SSO). When enabled, you will log in to the Primary account and be able to see payments and information for all accounts tied to the Primary. The *Payments* Page looks slightly different for these accounts.

These accounts can search for payments by TIN. Also, there is a "Business Info" column which displays the TIN and name of the business, to help you when reconciling payments.

Reminders

- All accounts requested must be enrolled in a Zelis® electronic products (Consolidated Check Accounts do get Portal Access) or enrolled in the ePayment Center.
- 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.

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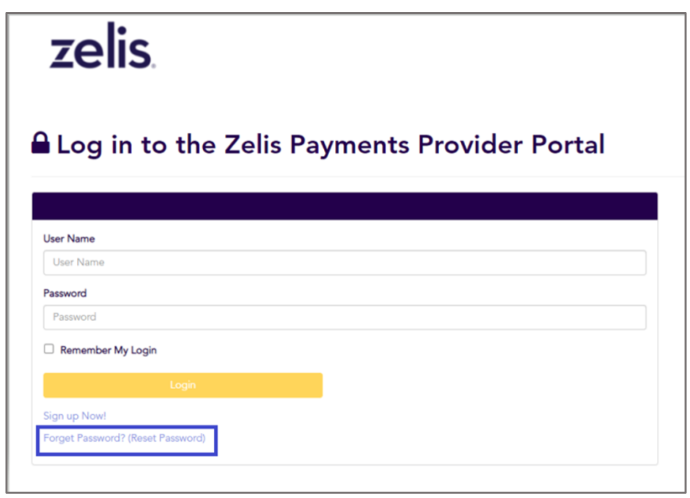
Portal Troubleshooting Tips

- Make sure you are using the latest version of Google Chrome. Chrome is the best browser to use to access the portal. The portal DOES NOT function on Safari (IOS).
- The portal does not function on mobile devices.
- If using Google Chrome, Firefox, Internet Explorer, or Microsoft Edge, and the portal is not functioning properly, clear your browsing history, cache, and cookies.
- Ensure there are no site or pop-up blockers.
- If using a bookmark to reach the Portal, and it is providing an error, manually go to the portal using this link https://provider.zelispayments.com.
- Admins are the only ones who can update/edit/reset other Users. Reach out to your Admin to fix any issues with your profile/access.

How to reset your password

To reset your password, go to https://provider.zelispayments.com, then click **Forgot Password/Reset Password** to receive an email with a link to reset the password. See below:

> *If you requested to reset your password but received the error "invalid token" when attempting to use the link from the email, the link has expired (reset password links are only valid for 24 hours). You will need to follow the reset steps again and use the link within 24 hours.*
>
> *If you are unable to reset your password, contact your Administrator.*



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