ePayment Center

Training Guide

Texas Children's®
Health Plan

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Introduction

The ePayment Center, or ePC, is a is an EFT and ERA delivery platform, provided to you by a specific payer and is conformant with Centers for Medicare & Medicaid Services (CMS) guidance on basic essential EFT & ERA services. You can find electronic payments from this payer with easy-to-use search options – and download or request data delivery in a format that works for you. You will also find the resources you need to personalize and manage your account. Administrators should also become familiar with the Supplemental Admin Guide.

Intended Audience

This guide is intended for Providers and Administrators utilizing ePayment Center.

As a provider you will learn about:

- Registering for the Portal
- Accessing the Portal
- Sections within the portal
- Troubleshooting

As an administrator you will learn about:

- User Management
- Settings

Access Details

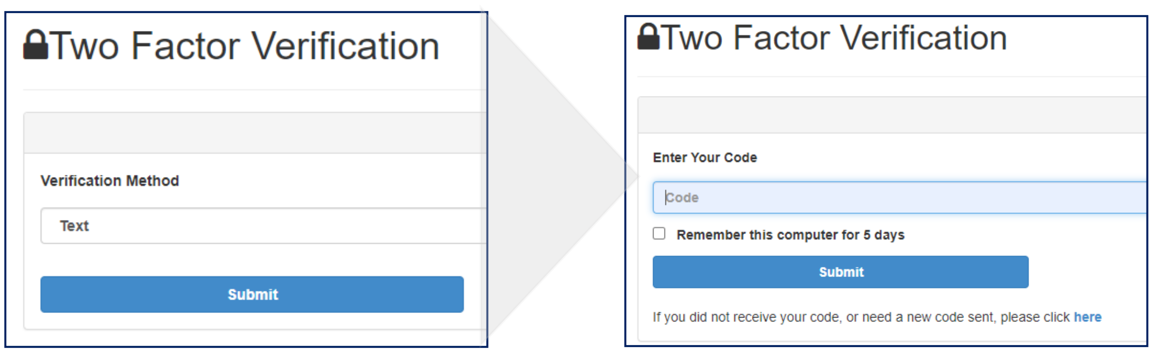
If your authorized decision-maker does not yet have access, they can request a registration code via the ePayment Center. Once created, they will be able to manage logins for your account. If you need support, contact the ePayment Center support at 855-774-4392.

Logging In

After you have completed registration and have a username and password, you will be able to login to the ePC.

How to Login to the ePC

1. Enter your **Username**.
1. Enter your **Password**.
2. Click **Login**.
3. Select your **Verification Method** (Text or Voice).
4. Click **Submit**.
5. Enter the **Verification Code**.
6. Click **Submit**.

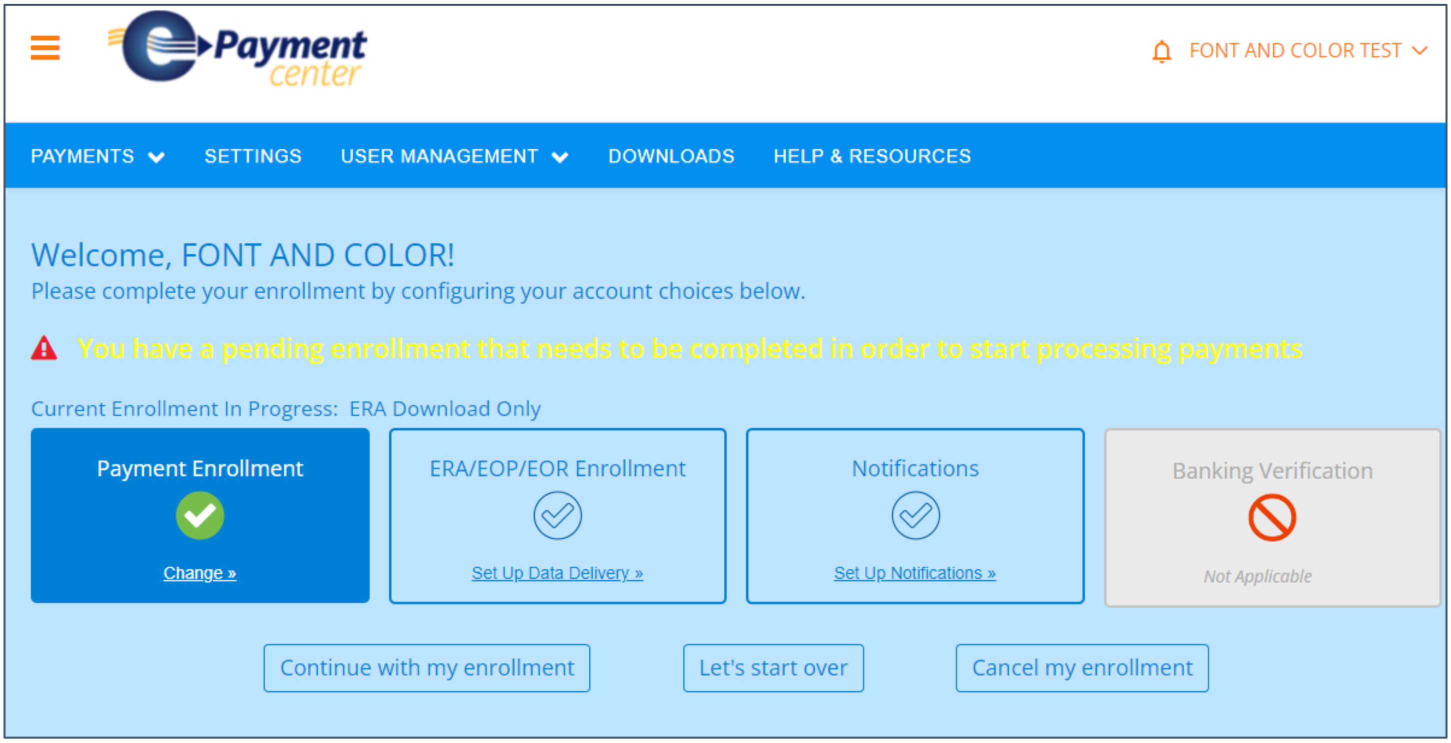


How to Reset User Password

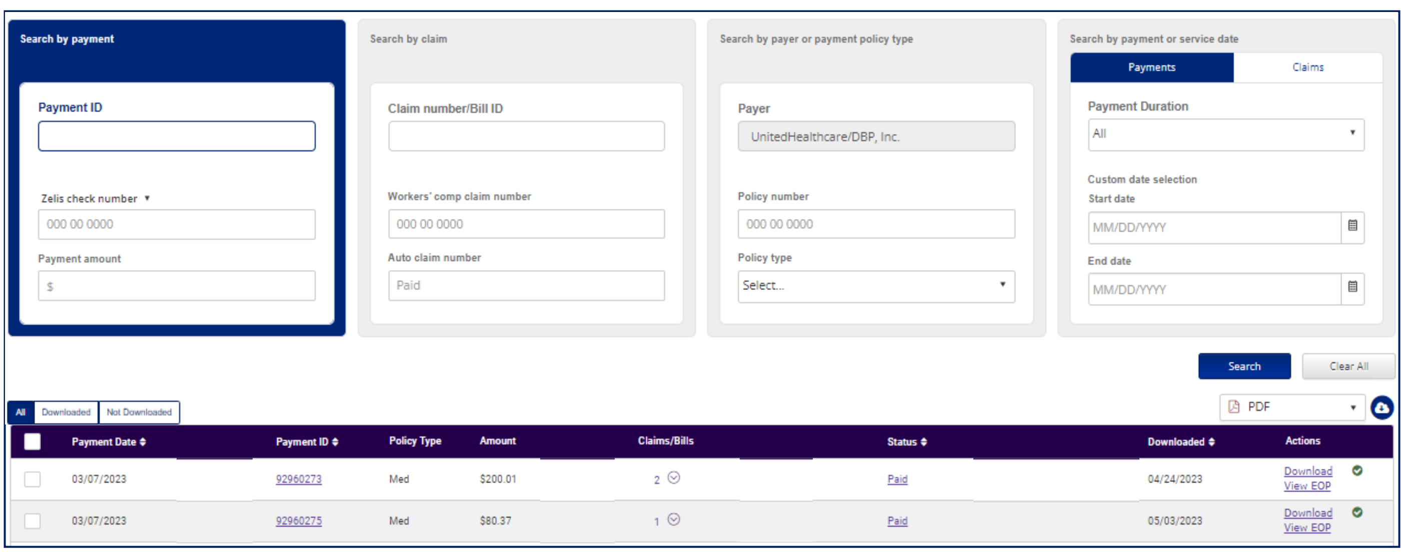
1. From the Login page, click the **Forget Password? (Reset Password)** link to have the reset instructions sent to you by email.
2. When the email arrives, follow the instructions provided.

Initial Enrollment

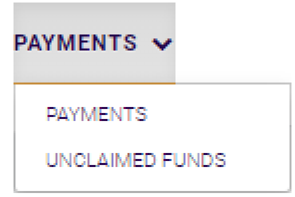
While your enrollment is pending, you will see a screen similar to the one below. This screen confirms where you are in your enrollment process and prompts you to complete any necessary steps.



Once your enrollment is complete, ePC will open to the Payments screen.



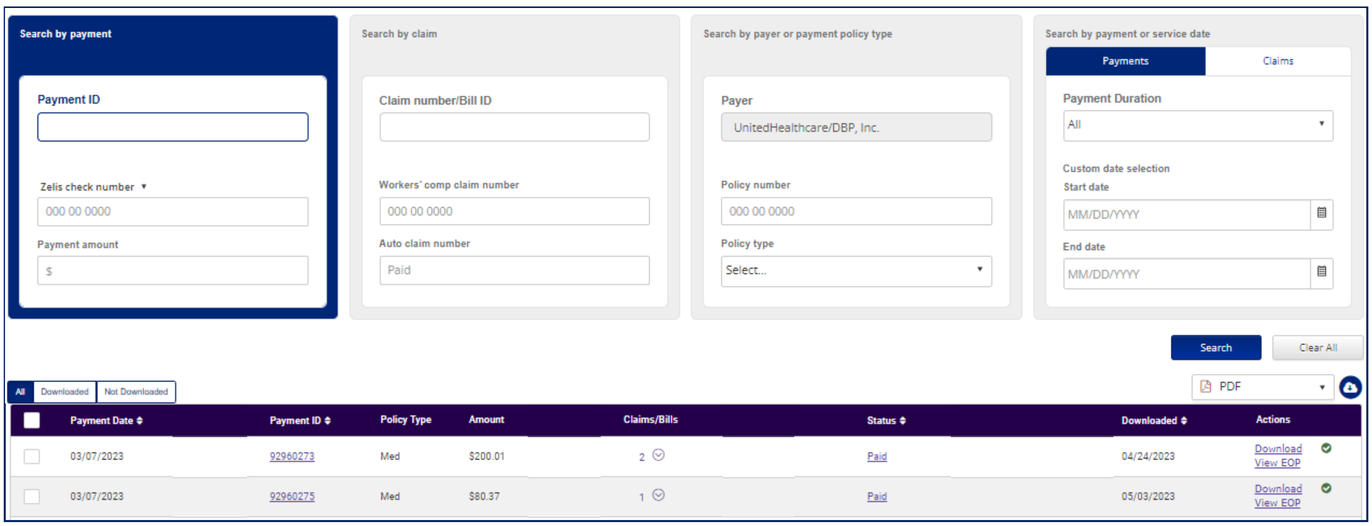
Searching for Payments



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

Payments

The *Payments* page enables you to search for your payments and remittance. 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".

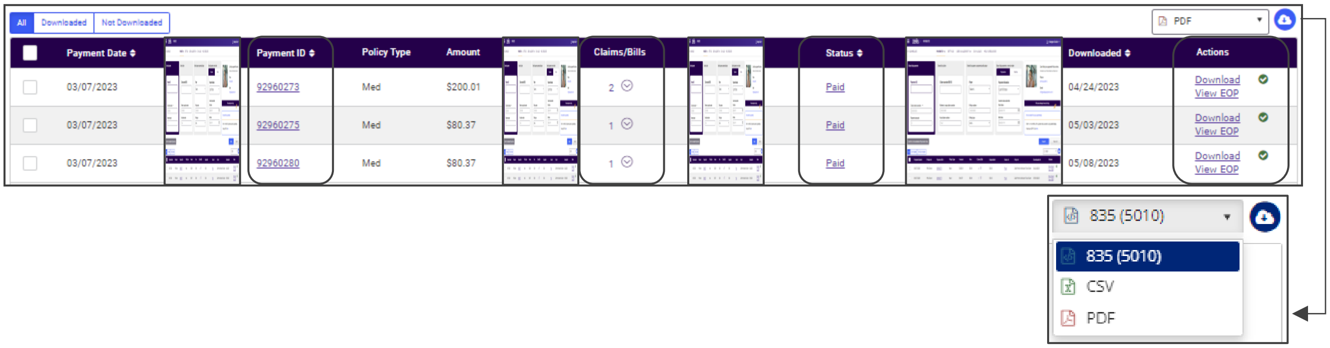


Payments Columns

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.

- **Payment Date** – When the payment was processed/settled.
- **Amount** – How much was paid.
- **Claims/Bills** – The number of claims within the payment; the dropdown arrow displays a list of claims associated with the payment.
- **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.
- **Downloaded** – This advises when/if the payment was downloaded.
- **Actions** – View or download the EOP.

Note that many of the columns are sortable by clicking the column name. This makes it easy to sort by Date, Payment ID, Status and Date Downloaded.

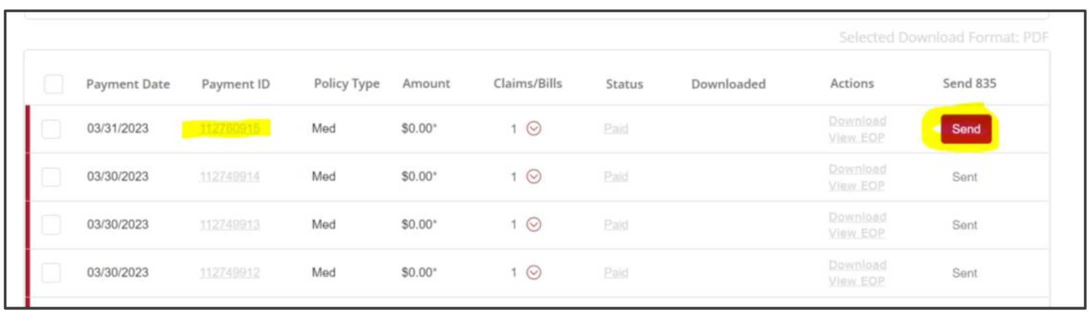


Above the list of results, you can select the desired format, such as PDF. Your last selection will remain your default, although you can change it at any time by clicking the drop-down arrow. This is especially useful for batch outputs to Excel (CSV) or exporting to ERA (835).

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

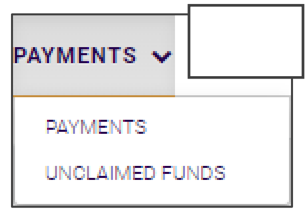
Downloading EOPs/ERAs

You can request delivery of each EOP/ERA to the third party of your choice. This gives you control of where and when your data is sent each time your data is available.



Note that downloading multiple EOPs/ERAs – or one 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. To download multiple EOPs, check the boxes to the left of the desired payments, before clicking the download icon at the top-right.

Unclaimed Funds



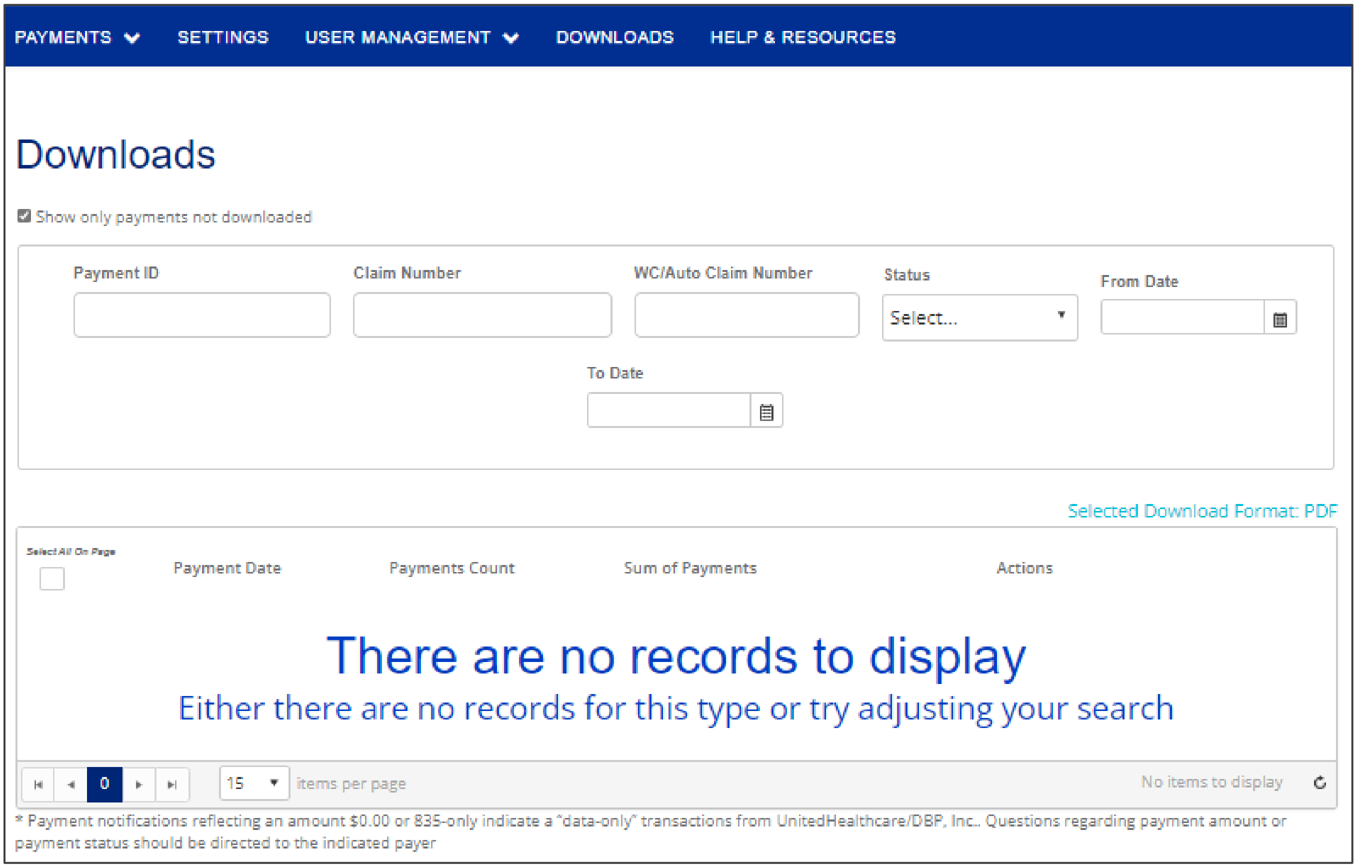
Unclaimed funds, also known as escheatment, occur when a financial institution hands over unclaimed property to the state. In other words, if we issue you a payment and it is not deposited for 1 to 5 years, it will be considered unclaimed which, by law, will be turned over to the state.

Retrieving an unclaimed fund

For any payment that has not been turned over to the state, you can claim these funds by selecting the check boxes below and clicking "Reissue payments". This will reissue your selected payment back to you via your preferred payment method.

Viewing Available Downloads

The **Downloads** page is where you can retrieve your remittance advice (ERAs) that has yet to be downloaded or requested for delivery. This page will default to the format that was selected during your ePayment Center Implementation. If no ERAs are outstanding, this screen will be empty, as shown below.

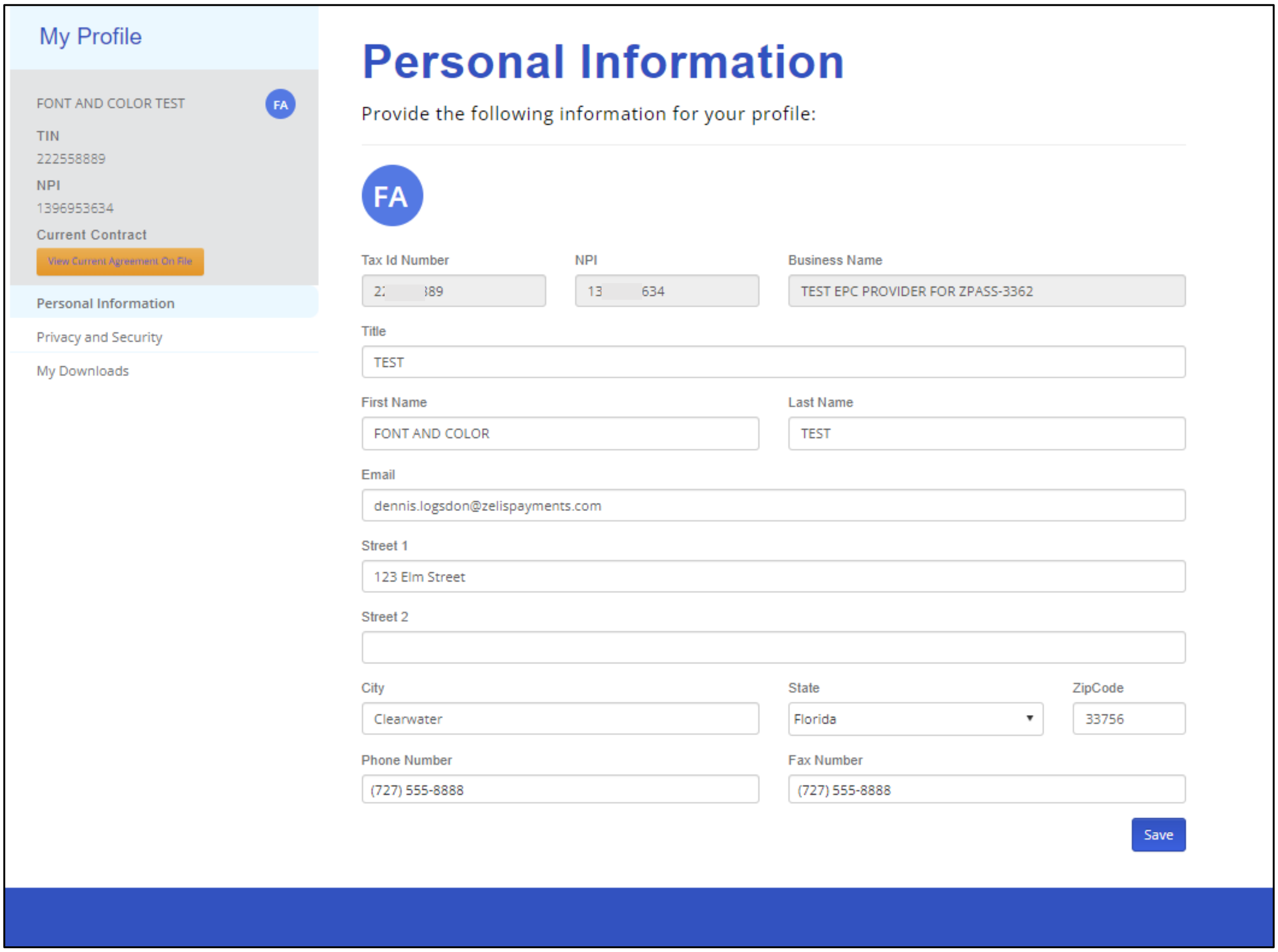


Profile Settings

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

Profile Information

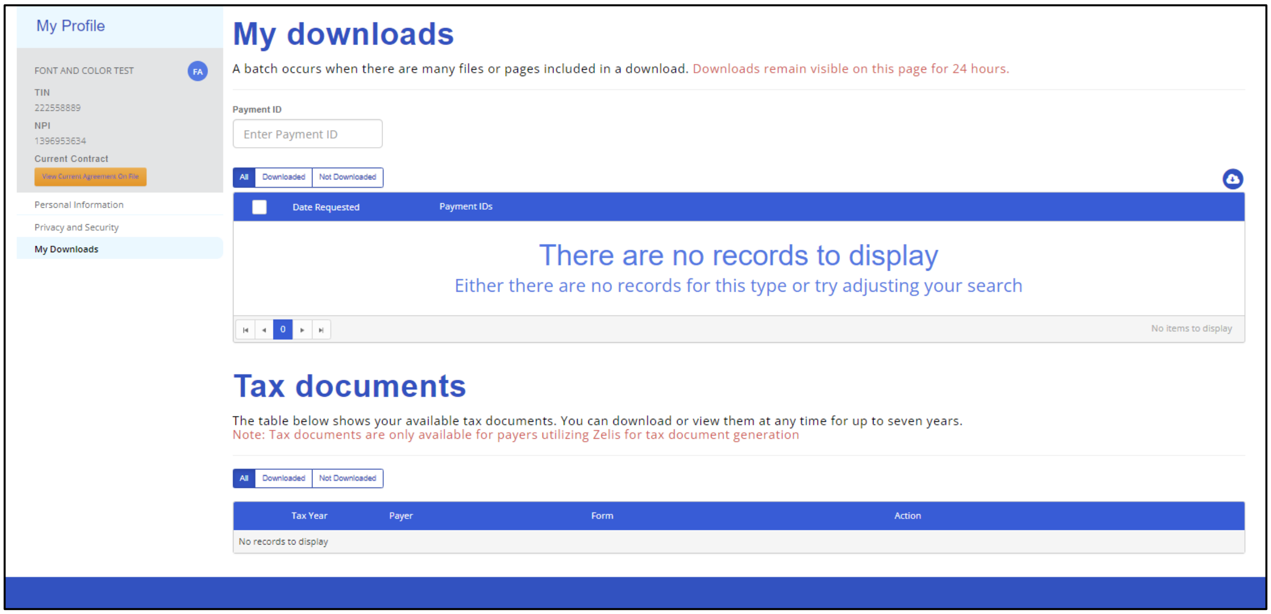
From the *Profile Information* menu, you can update contact information and reset your password and security questions.



My Downloads

The My Downloads section displays the payments you have downloaded or requested for delivery (if applicable, based on the products your office subscribes to). Once a file has been downloaded or sent, it will remain visible on this page **for 24 hours** (though you can always download a file again from the Payments page).

Depending on your payer, you may also find Tax Documents on this page.



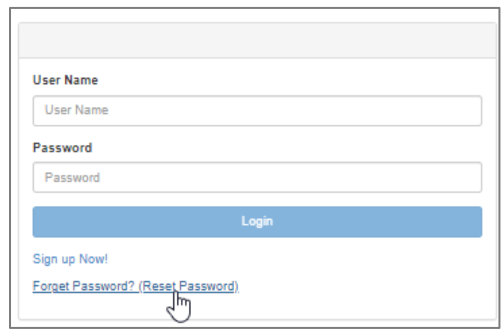
Portal Troubleshooting Tips

The tips below will help you as you work in ePC.

- Google 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 you are using Google Chrome, Firefox, Internet Explorer, or Microsoft Edge, and the portal is not functioning properly, clear your browsing history, cache, and cookies.
- Make sure you disable site or pop-up blockers.
- 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

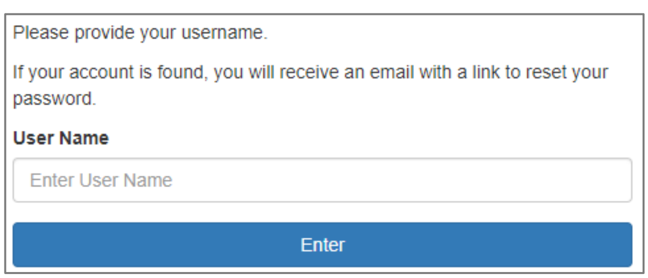
1. From the **ePC Provider Portal URL**, click **Forgot Password/Reset Password** to receive an email with a link to reset the password. See below:



*If you 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 Provider Portal Administrator.

2. Click the **Forgot Password? (Reset Password)** link, it will take you to the page below.
3. Fill out your Username.



4. Click **Enter**.

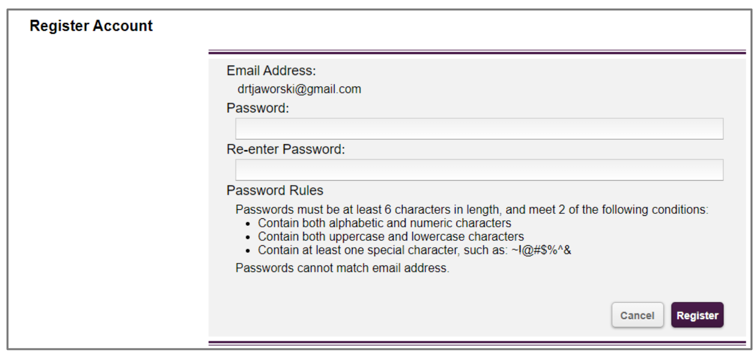
ZIX Security

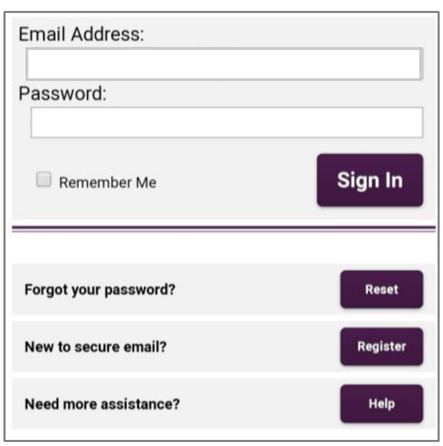
Due to the sensitive nature of the information sent through email for ePC accounts, there is an extra verification step prior to you being able to access the original email from ePC. When an email from ePC is sent it will direct you to the ZIX security page, which will prompt you to create a password before allowing you to view the email ePC sent to you. You will only need to set up a password once, after that, you must login to ZIX to see your ePC emails. See steps below.

The ZIX Process

1. You will get a message indicating that there is a new ZixCorp secure email message from Zelis® Healthcare.

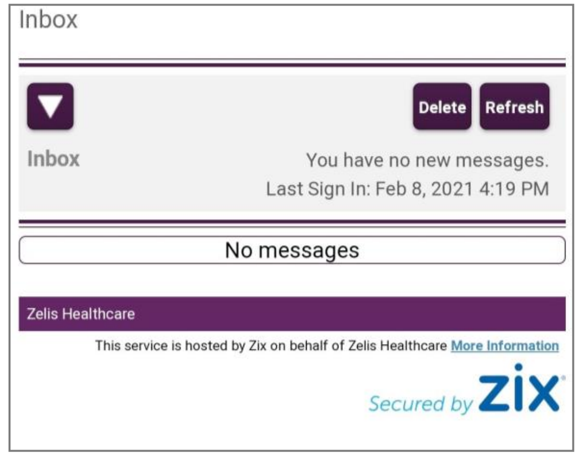
2. The first prompt is to create a password associated with your email address.





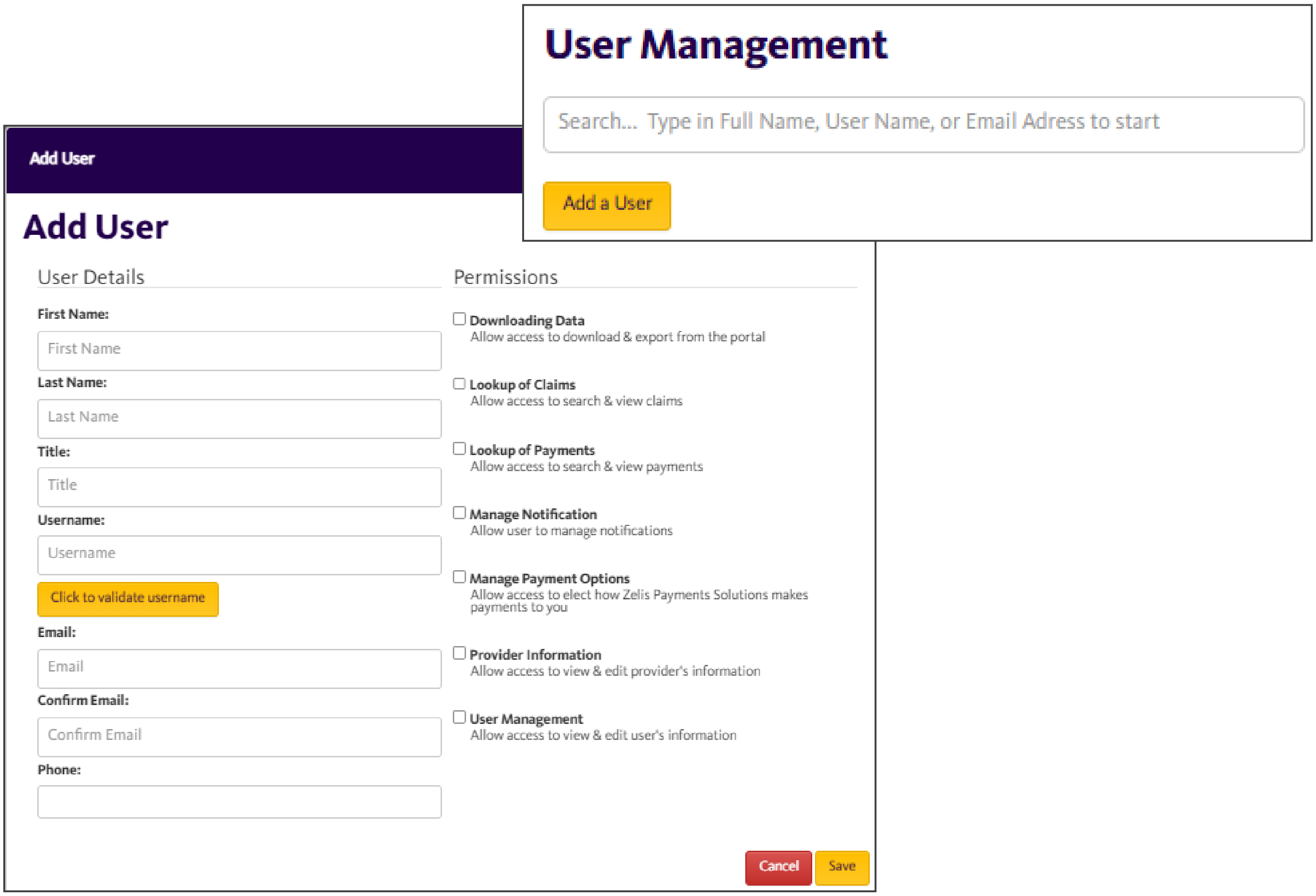
3. After you create a password, you will be prompted to log-in.

4. After you log-in you will be able to view any emails that were sent to you from the ePC.



User Management - Administrator Function

The *User Management* page is available for use by the ePC's administrator to manage staff logins.



How to Add a User

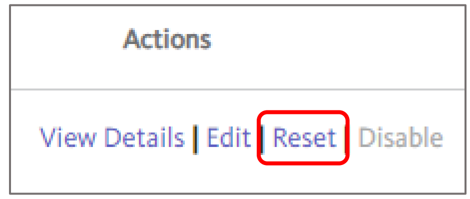
1. Within the **User Management menu** > **User Management**, click the **Add a User** button.
2. Fill out the User Details for the new User.
3. In the Permissions box, you **MUST** provide the following permissions:
   - Downloading Data
   - Lookup of Claims
   - Lookup of Payments

Without these permissions, the user will not be able to see information in the 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, to access this email, please have them follow the ZIX instructions.

Resetting Password and Security Questions



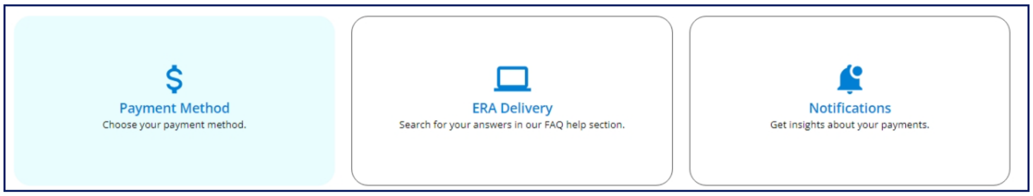
Not only can you create users and define their privileges, but you can assist in troubleshooting their access, by clicking the Reset link to the right of a user's account.

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.

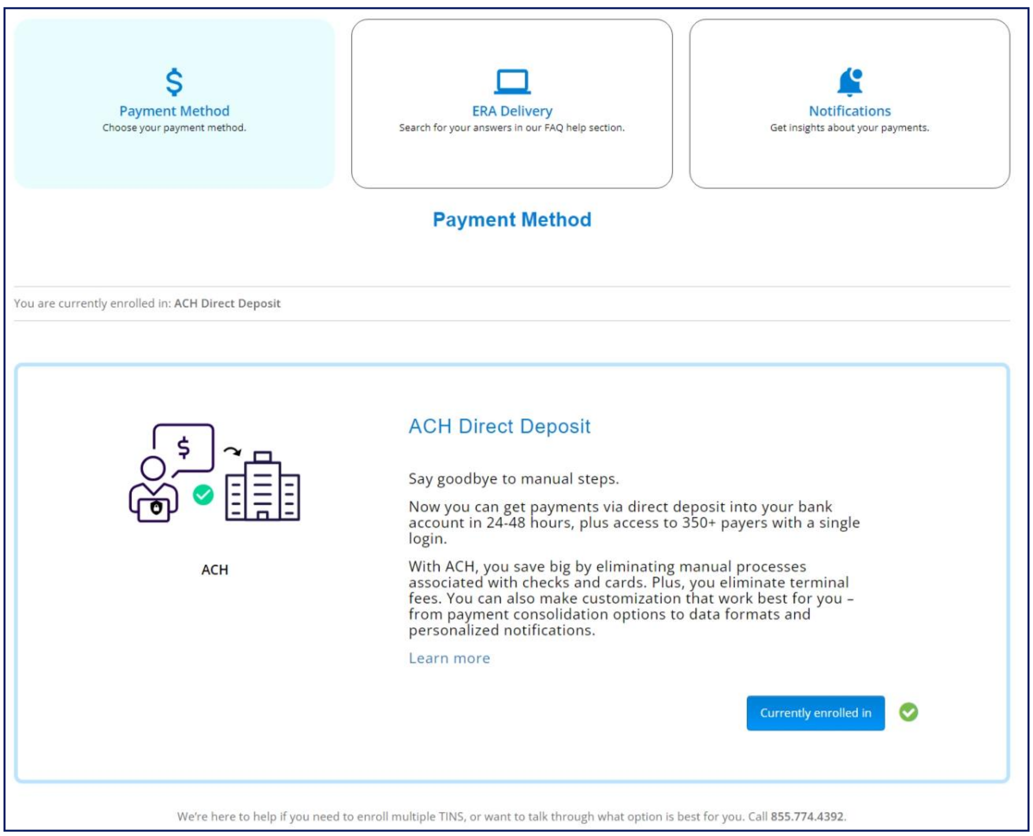
Settings – Administrator Function

The *Settings* page is where the administrator can update payment preferences (banking info and notifications) and request delivery for ERAs/835s.



Payment Method

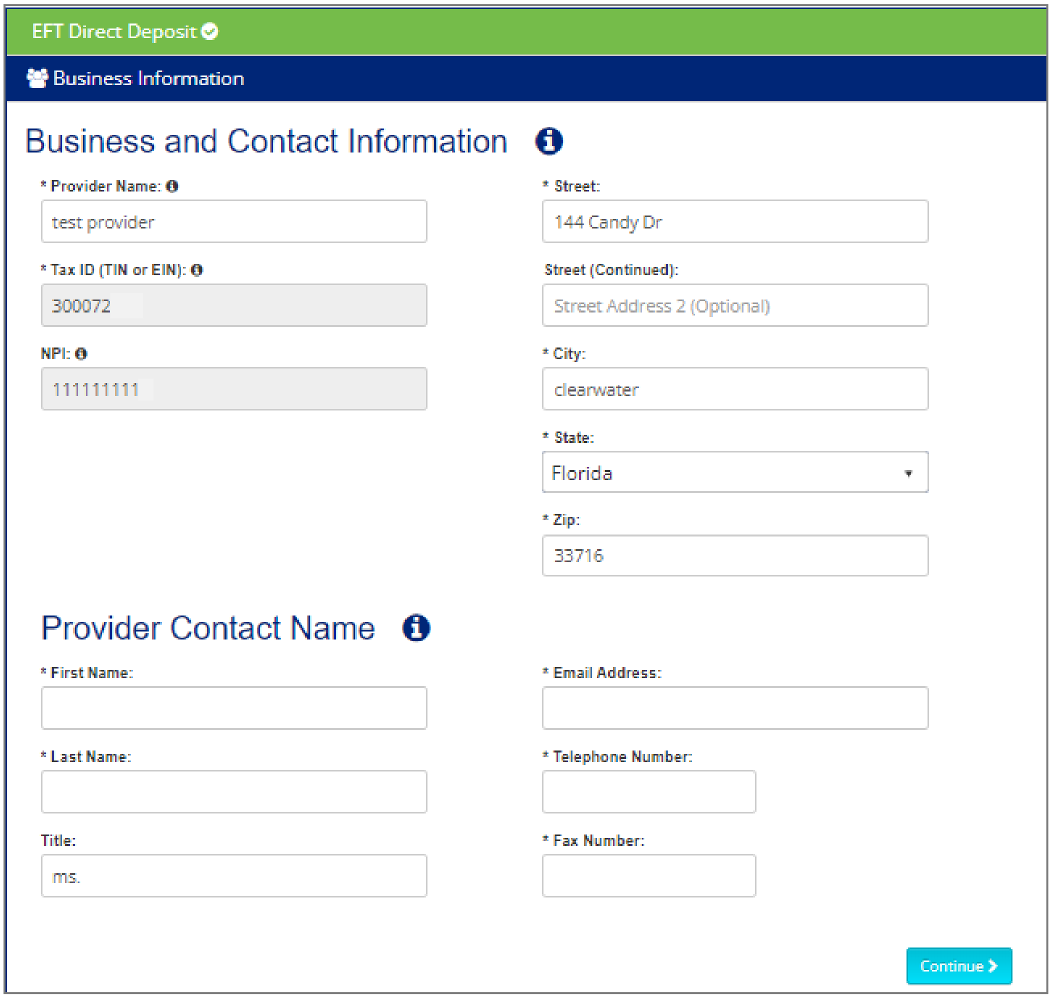
If you have not already enrolled in the ePC, you will see the "Enroll" to enroll in ePC, rather than the "Currently enrolled in" button. You can update your banking information/account information, by clicking "Currently enrolled in". See steps below.

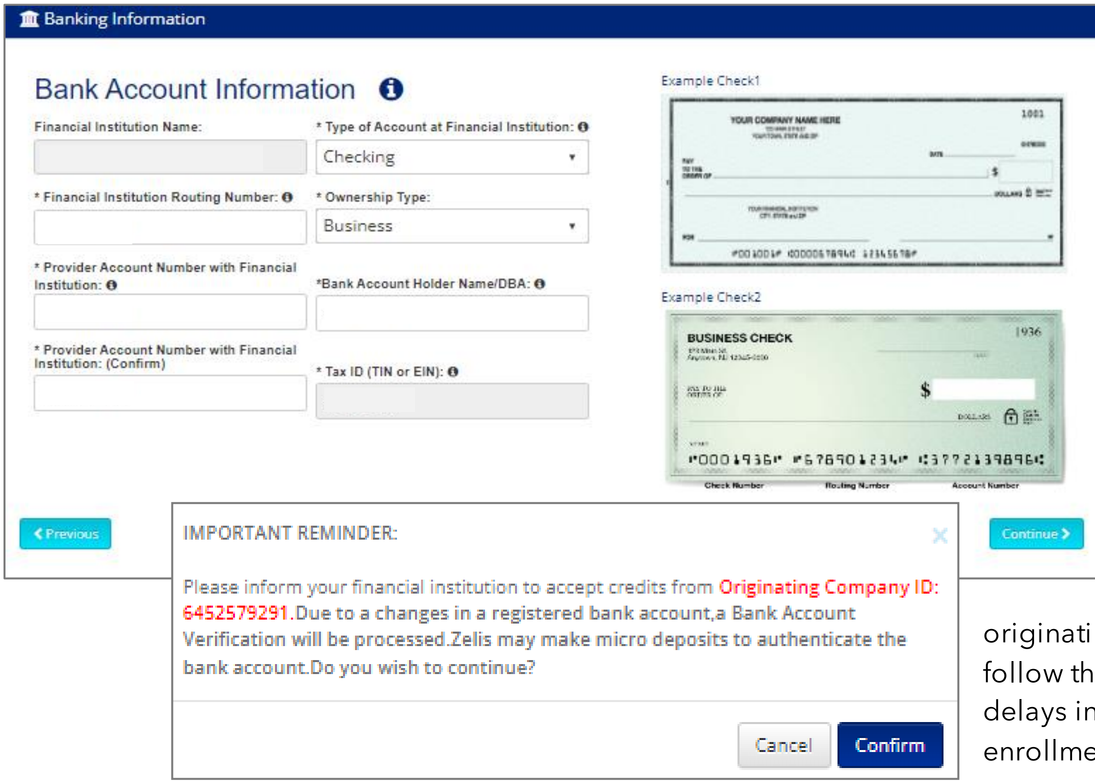


The very first time you login this is where you complete your enrollment.

How to update your Account

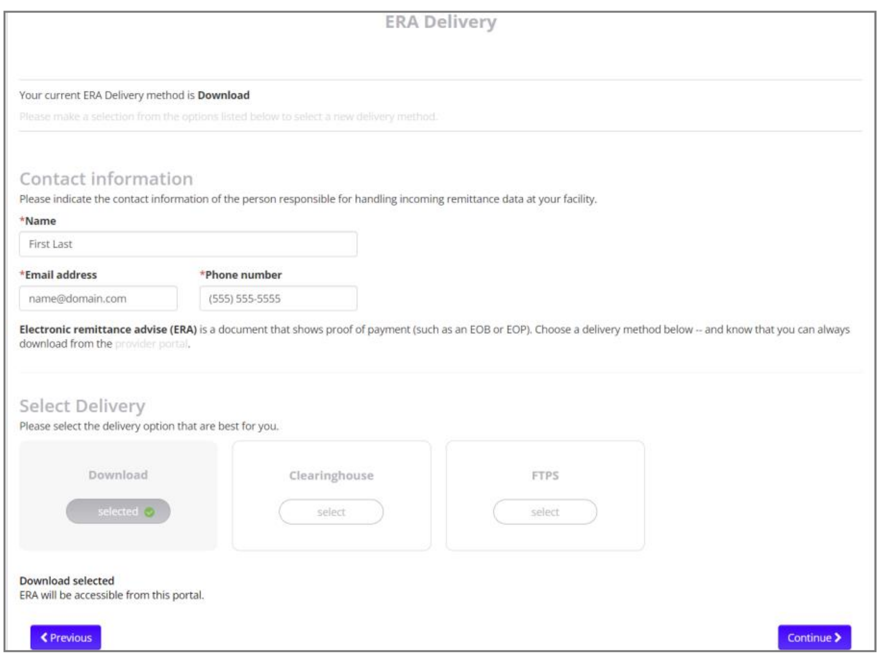
1. Within **Settings > Payment Method,** click the **"Currently enrolled in" button**.
2. In the *Business and Contact Information* section, enter the required information and **click Continue**.





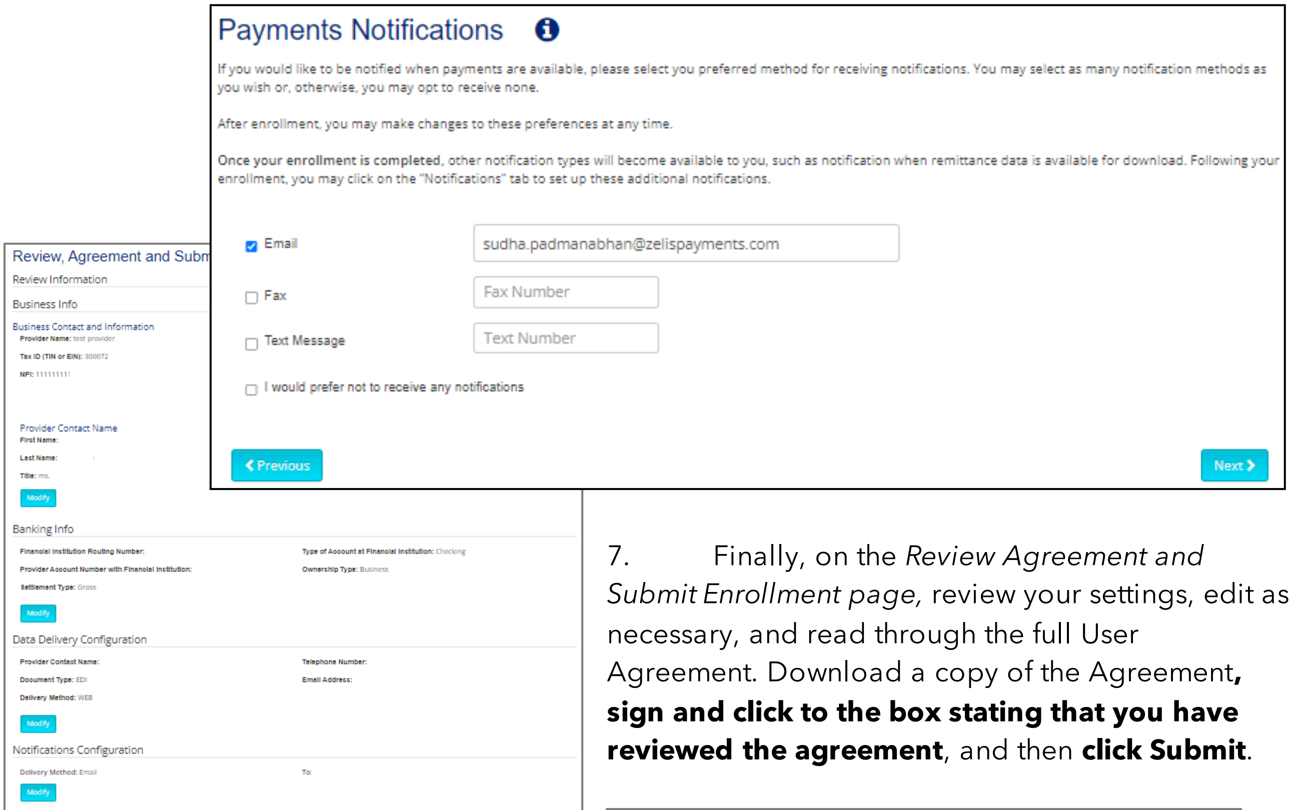
3. In the *Banking Information* section, fill out your banking information; and click **Continue**.

4. A pop-up will advise you to **reach out to your banking institution** and provide them the ePC's originating ID. Please be sure to follow this step so that there are no delays in processing your enrollment. Then click **Confirm.**



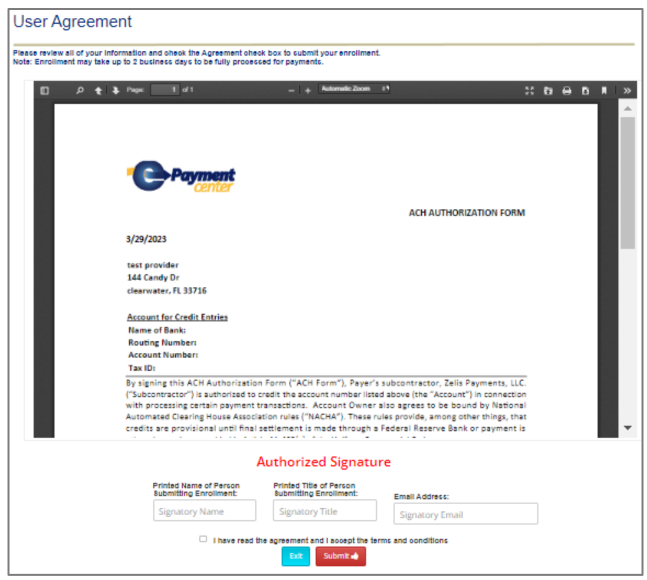
5. In the *ERA Delivery* section, fill out your ERA Delivery options**.** Fill in your contact information and the ERA Delivery you wish. Then, click **Continue**.

6. On the **Payments Notifications** screen, select if and how you would like to receive notifications about payments. Then, **click Next**.



There will be a pre-note and verification process completed at this time. Please allow up to 10 business days for this to occur. After the verification is complete, your payments, for this specific Payer, will be direct deposited and you can access the EOPs through the ePC.

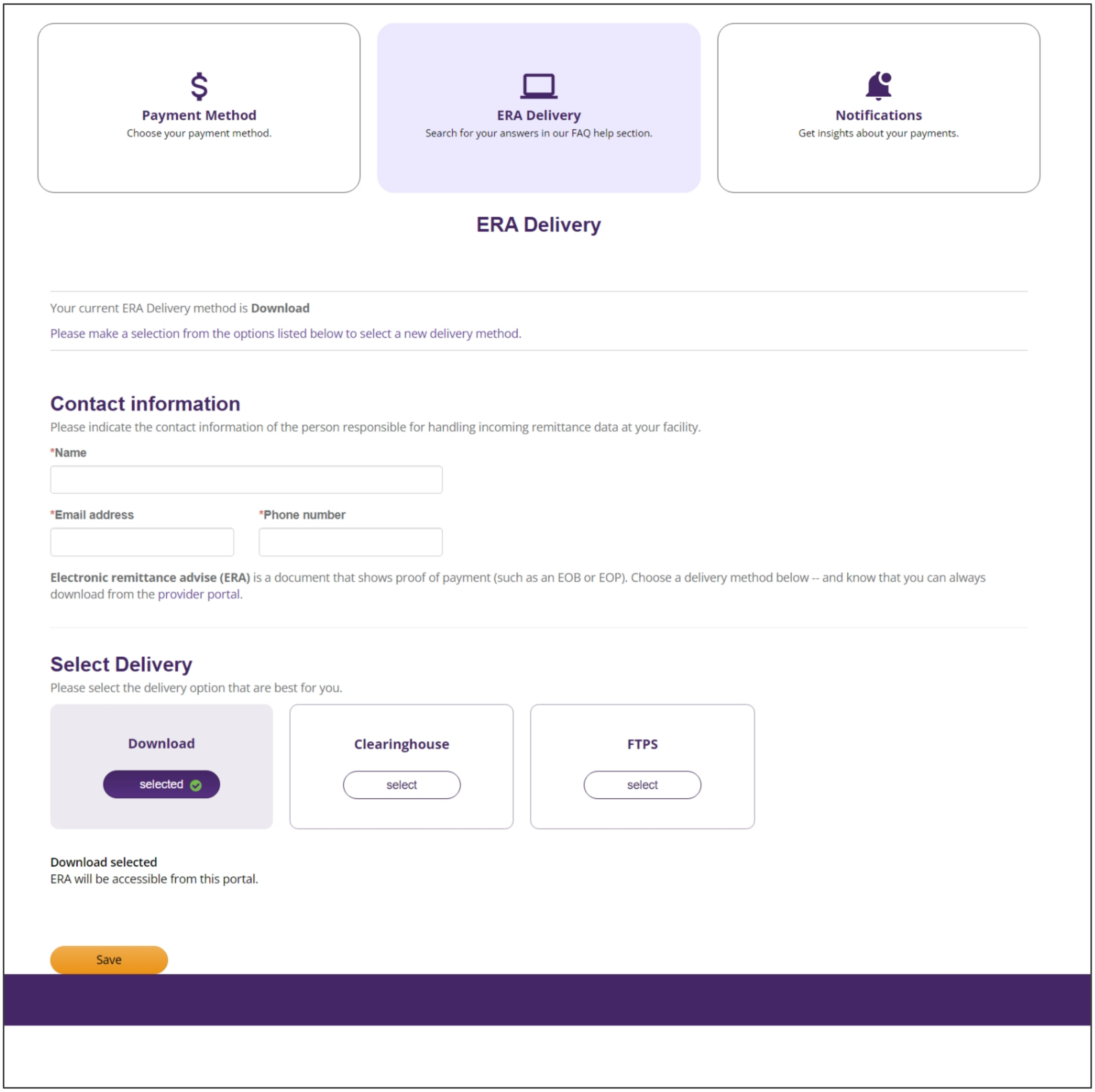
7. Finally, on the *Review Agreement and Submit Enrollment page,* review your settings, edit as necessary, and read through the full User Agreement. Download a copy of the Agreement**, sign and click to the box stating that you have reviewed the agreement**, and then **click Submit**.



ERA Delivery Method

In this screen you will see how your Electronic Remittance Advise documents are delivered (Explanation of Payment). You may have one or more options on to receive this nonpayment data. These include but are not limited to, download, Clearinghouse or FTPS.

Be sure to fill in the name, email, and phone number of the person on your team responsible for handling incoming remittance data.



Download

Log into the portal and directly download your nonpayment files. You can choose from three file types: EDI (835), CSV or PDF.

Clearinghouse

Choose from a list of clearinghouses that were approved by your EPC payer. Once in the portal, you will be able to manually push your 835 file to that clearinghouse by pressing send. For questions about enhanced clearinghouse features enabled on your EPC, please contact your ePC support team.

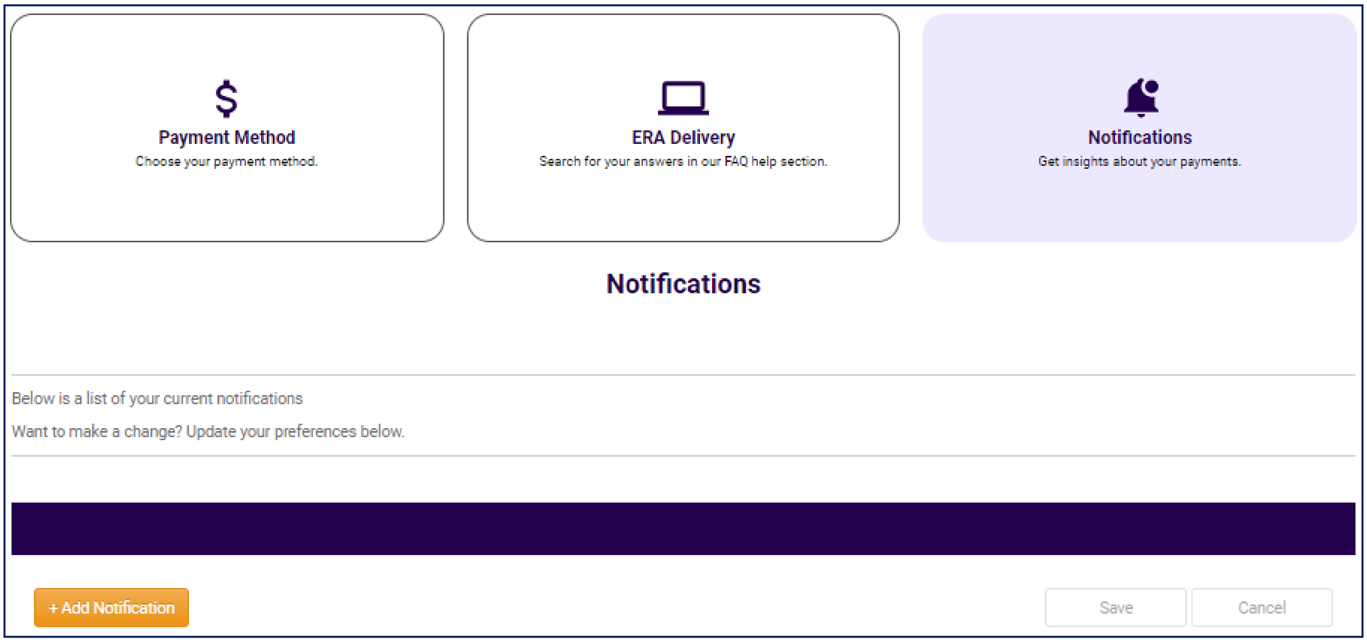
FTPS Configuration

FTPS allows you to configure a FTP destination of your choice. You can choose to receive the file as EDI (835) or PDF. Below is a description of each field. All fields are required, and you will have to test the connection before being able to save and use the connection.

- **FTP Name:** A unique name to identify the FTPS connection. This will allow ePC support associates to easily identify your FTPS setup.
- **FTP Host:** The IP address of the FTP server to which you want to connect.
- **FTP Remote Path:** The location on the FTP server where the files will be delivered.
- **Login:** The account or username that will be used to connect to the FTP Server.
- **Password and Confirm Password:** The password the FTP account will use to connect.

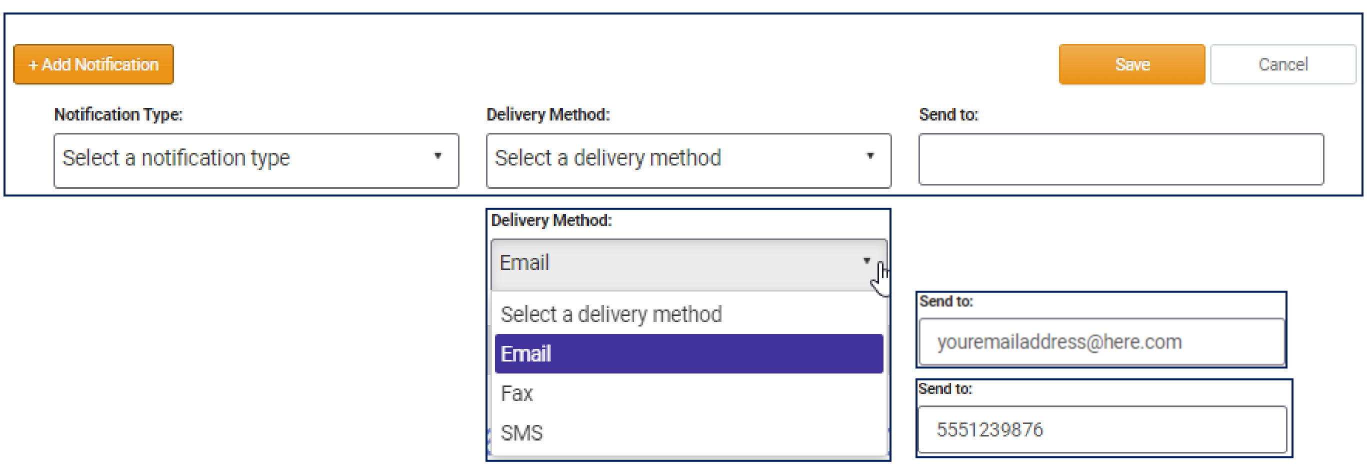
Notifications

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.



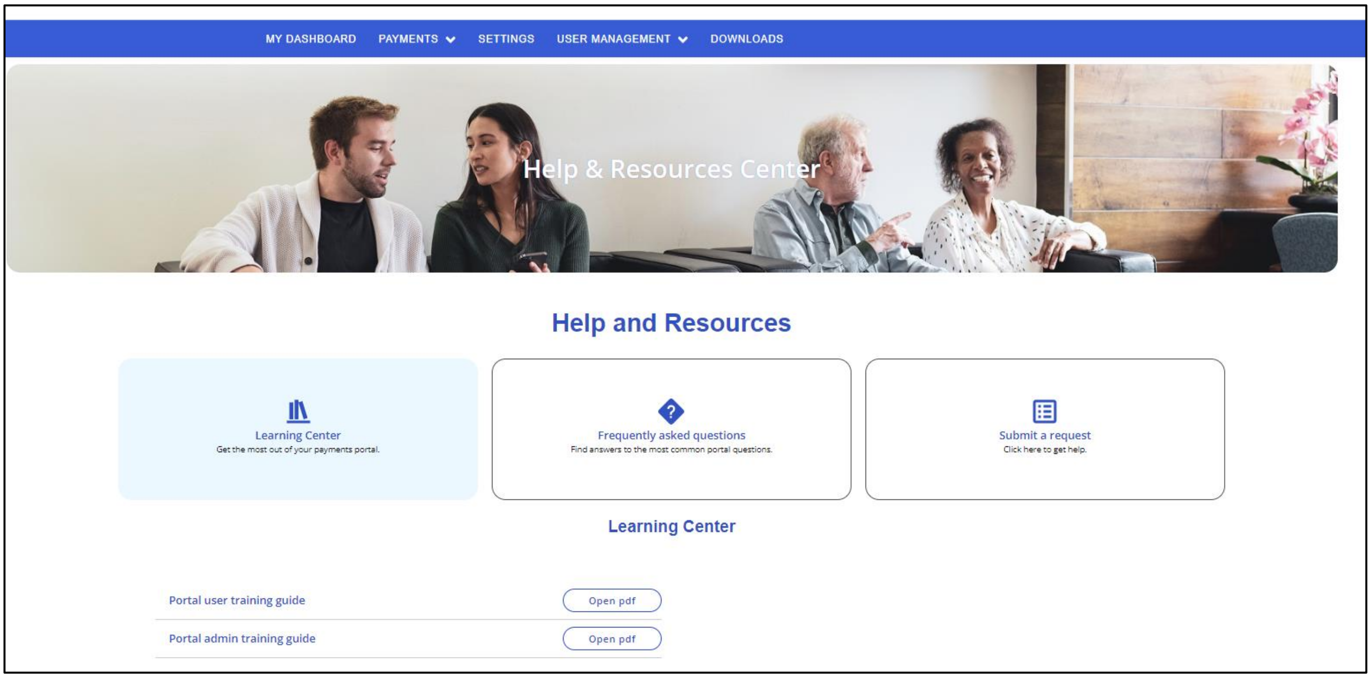
How to add notifications

8. Click the **Add Notifications** button.
9. Select the **Notification Type** and the **Delivery Method**.
    a. You can select from **Email**, **Fax**, or **SMS**.
10. Fill in the **Send to** field with the appropriate information. This can be a phone number or an email address depending on the selection you made in the notification type field.



Help & Resources

The *Help & Resources* page provides information about ePC and how to reach out for issues such as late/missing EFT or ERA, along with a helpful User Reference Manual that has a wealth of knowledge that relates to the ePC.



You can also submit a request for assistance: