echo®
payments simplified

Provider Payments Portal

QUICK REFERENCE GUIDE

ECHO Health, Inc. • Sharon Drive • Westlake, Ohio 44135
888.834.3511 • www.echohealthinc.com

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(Click on page number to go page)

Provider Payments Login

Important Note!
To have all needed functionality when using the ECHO Provider Payments Portal, be sure to **ENABLE pop-ups** *(i.e., turn OFF the pop-up blocker in your browser).*

Refer to the screenshot shown in *Figure 1*:

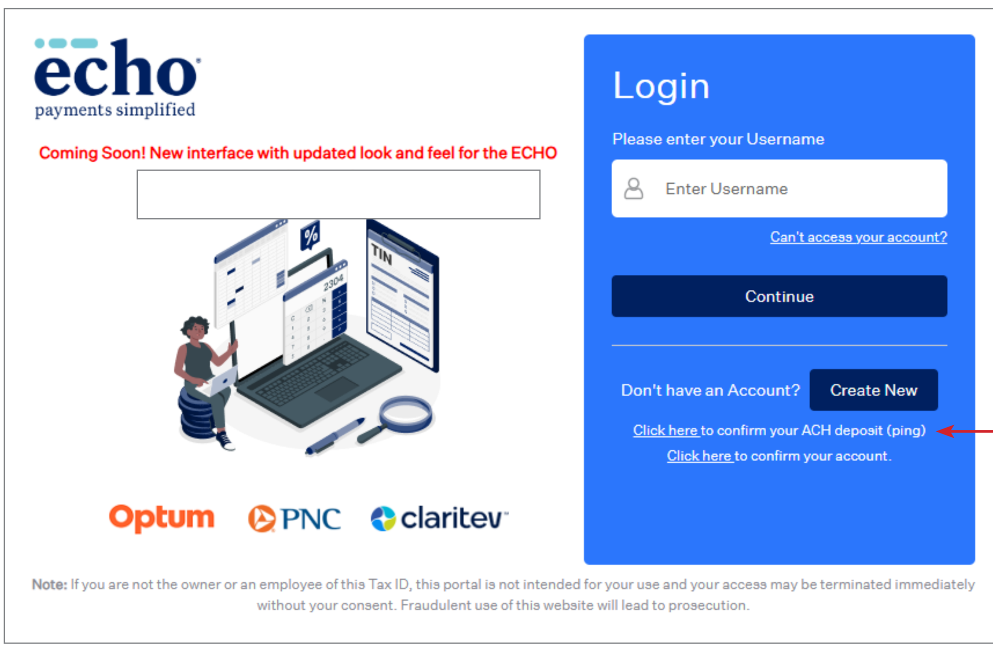
A. <u>If you have already registered (have an account) on the Provider Payments Portal</u>, enter your **Username** and click the "**Continue**" button. On the screen that opens, enter your "**Password"** and click "**Enter**." <u>You are now logged in</u> and the "**Inquiry Page**" ***(Figure 11, page 9)*** will open. **Note**: See ***pages 9-10*** to learn about the functions available on the "***Inquiry Page***."

B. If you can't access your account, click "**<u>Can't access your account</u>**?" link and follow the instructions.

C. If you are a first-time user **(Don't have an Account?)**, click on the "**Create New**" button and follow the prompts. **<u>Note</u>**: Detailed instructions for **First-Time Users** can be found on pages 4-8 of this Guide.

D. If you wish to confirm your ACH deposit, click on the link, "**<u>Click here</u> to confirm your ACH deposit (ping).**" After ping verification, you will be able to set up an account to access the Provider Payments Portal.

E. To confirm your account, click on the link, "**<u>Click here</u> to confirm your account**" and follow the instructions.



To "verify ping" described on next page

Figure 1

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Provider Payments Login *(continued)*

Verify Ping

If you select the link, "**Click here to confirm your ACH deposit (ping)**" on the Provider Payments Portal **Login** page, you are first directed to a page ***(Figure 2)*** where you must accept **Terms & Conditions** by clicking the "**Accept**" button to continue.

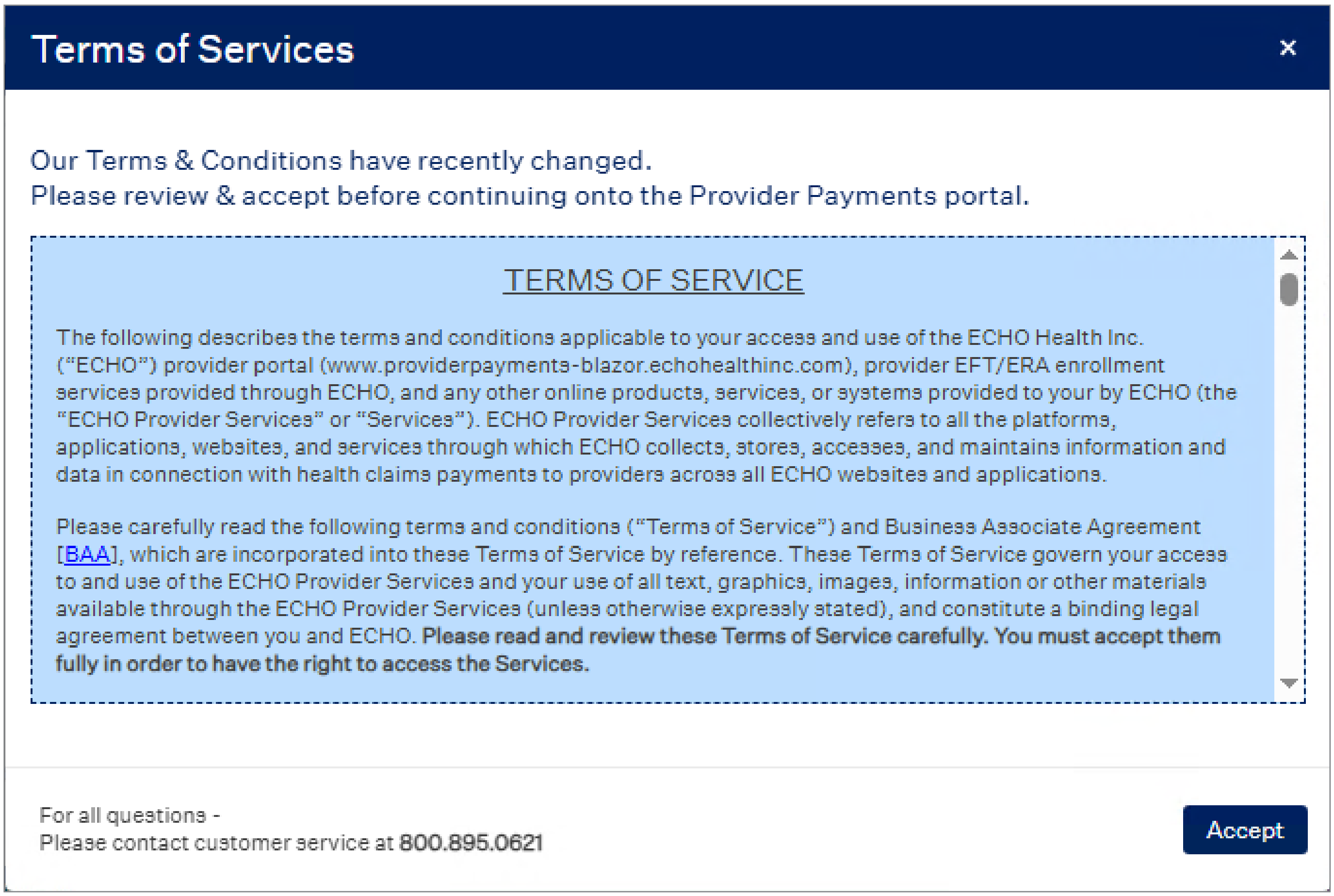

Figure 2

After clicking on "**Accept**," you are directed to the "**Confirmation of Account**" page (the ping verification page) shown in ***Figure 3*** on the next page.

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Provider Payments Login *(continued)*

Verify Ping *(continued)*

In the "**Confirmation of Account**" screen ***(Figure 3)***, enter your **TIN (Tax ID Number)** and **Deposited Amount** (ping). Click "**Verify**" to send. When your submitted data (ping) has been verified, you will see the screen and message shown in ***Figure 4***.

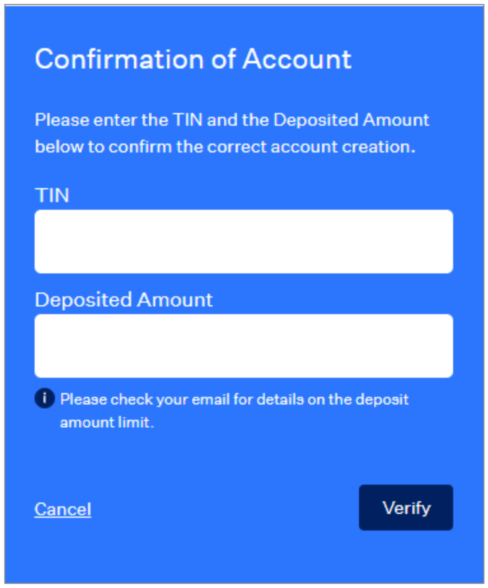

Figure 3

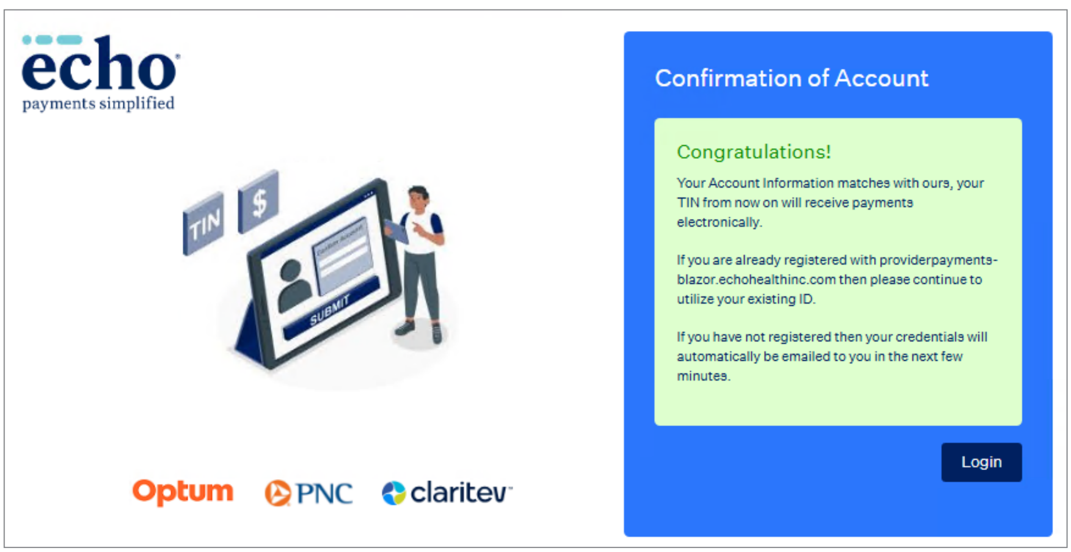

Figure 4

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Provider Payments Login *(continued)*

First-Time Users

Register/Create New Account Page

First-time users will need to register. Once you have successfully registered, you will be able to log in on the Provider Payments Portal "**Login**" screen ***(Figure 1, page 1)***.

To register, click the "**Create New**" button on the "**Login**" screen. This opens the "**Create A New Account**" screen ***(Figure 5)***. Fill in all required (*) information and click the "**Next**" button.

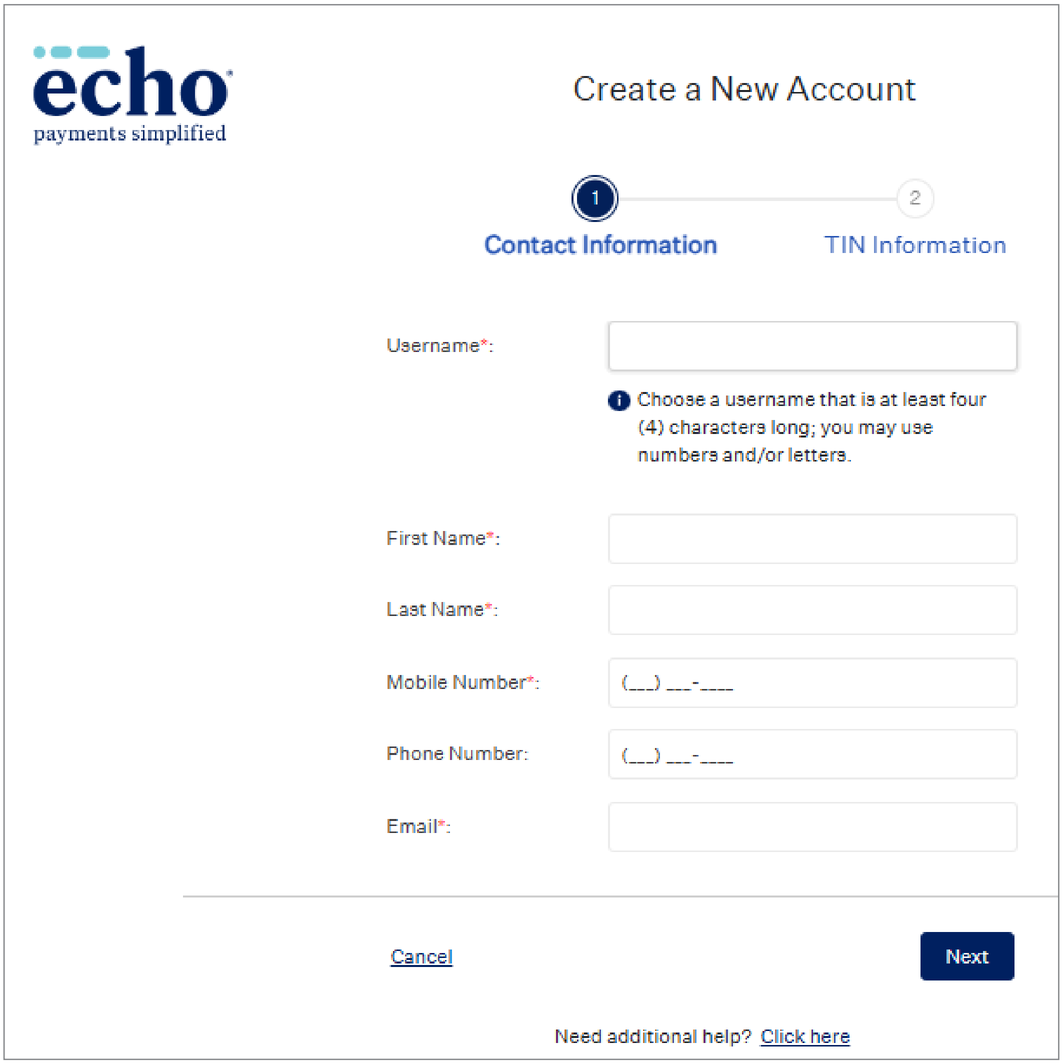

Figure 5

Provider Payments Login *(continued)*

First-Time Users *(continued)*

Register/Create New Account Page *(continued)*

After clicking the "**Next**" button ***(Figure 5, previous page)***, the screen shown below in ***Figure 6*** will appear. Fill in all required (*) information and click the "***Register***" button.

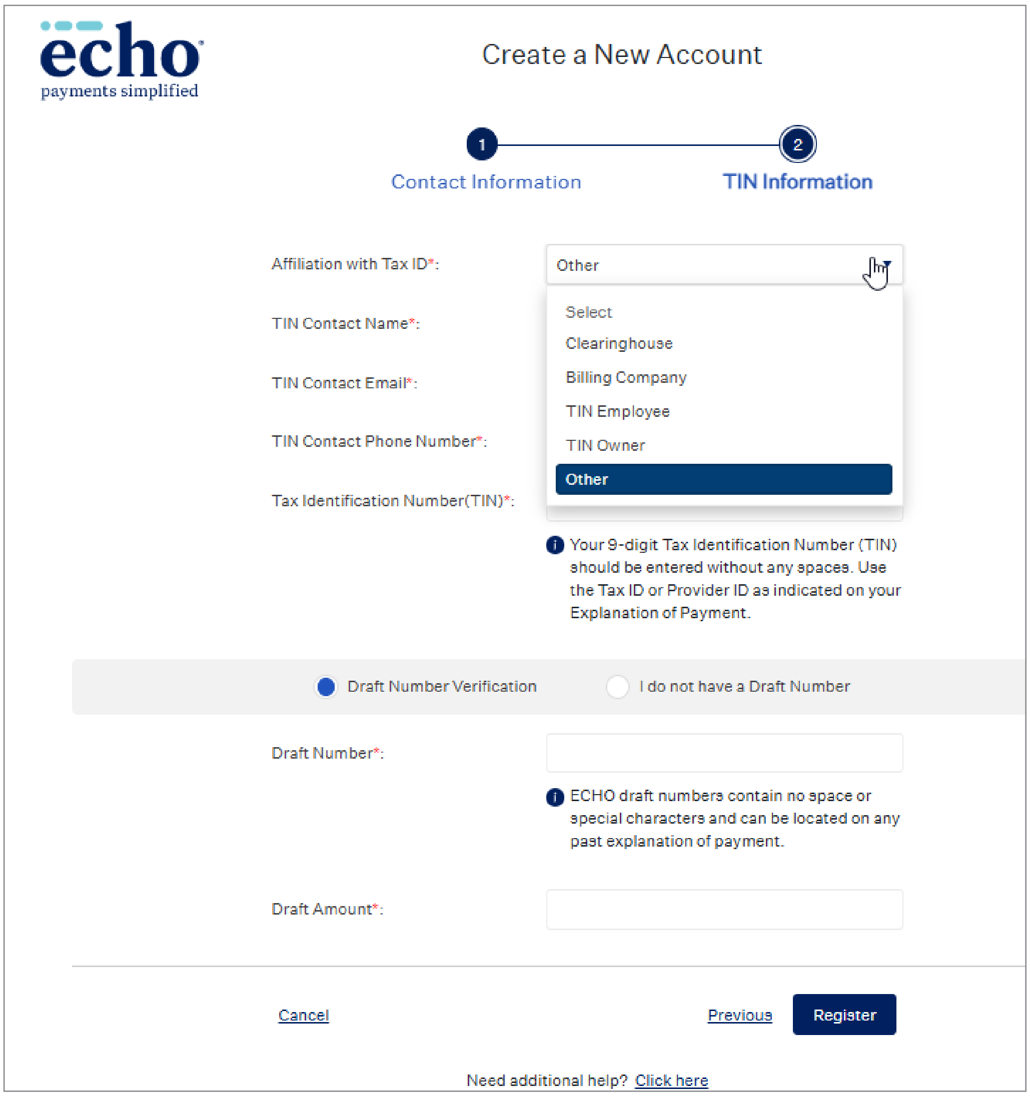

Figure 6

After clicking "**Register**," new users will receive an email with a code that is required to complete their registration ***(Figure 7, next page)***.

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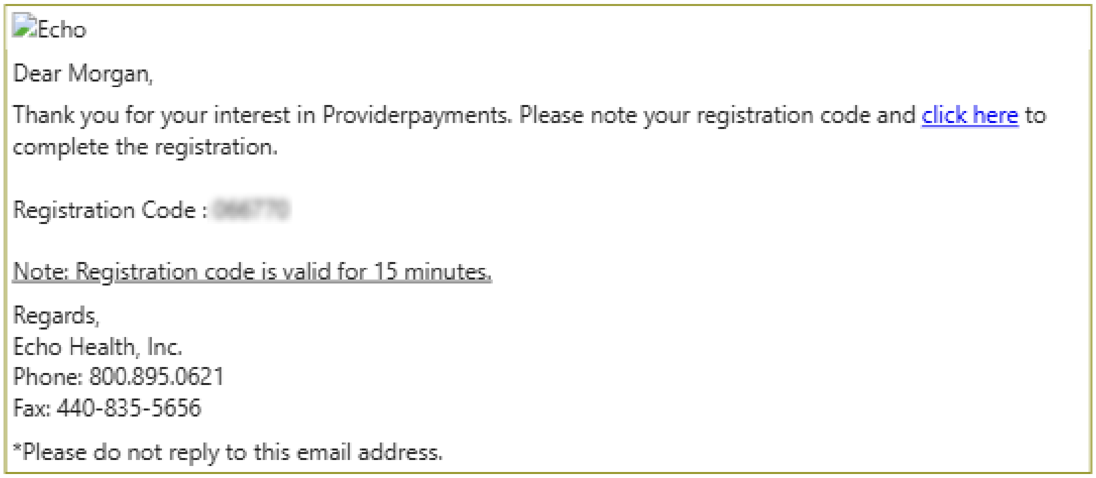
Provider Payments Login *(continued)*

First-Time Users *(continued)*

Register/Create New Account Page *(continued)*



Echo

Dear Morgan,

Thank you for your interest in Providerpayments. Please note your registration code and click here to complete the registration.

Registration Code :

Note: Registration code is valid for 15 minutes.

Regards,
Echo Health, Inc.
Phone: 800.895.0621
Fax: 440-835-5656

*Please do not reply to this email address.

Figure 7

The screen shown below ***(Figure 8)*** will appear. Enter the "**Registration Code**" just provided in the email message and click "**Submit.**"

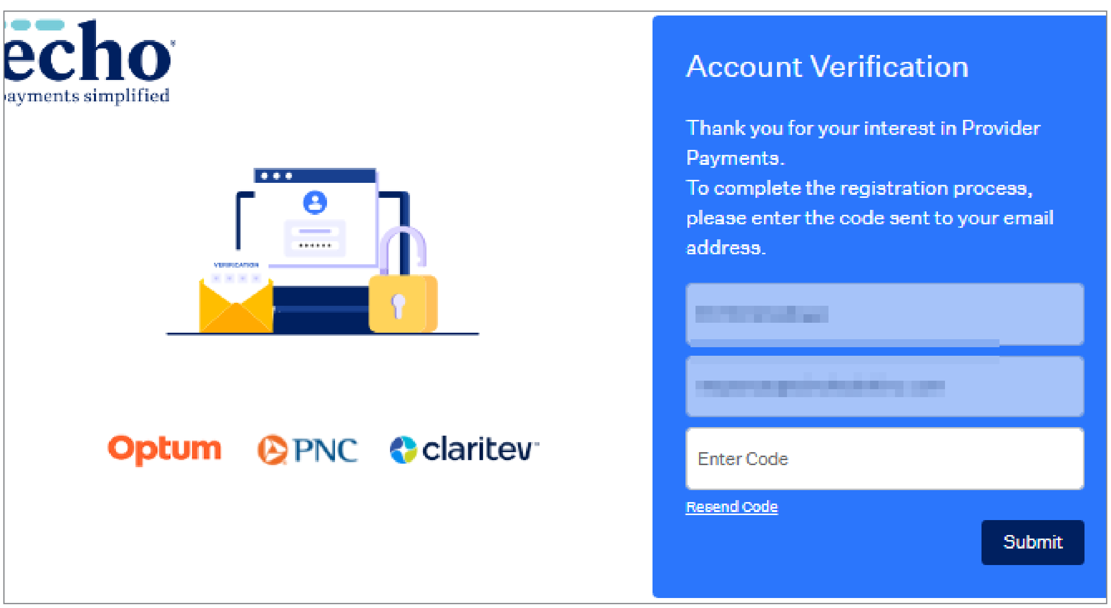


Figure 8

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Provider Payments Login *(continued)*

First-Time Users *(continued)*

Register/Create New Account Page *(continued)*

A new screen will open, prompting you to "**Create a Password.**" When your newly created password has been submitted, you will see the success message in the "**Update Password**" screen ***(Figure 9)***.

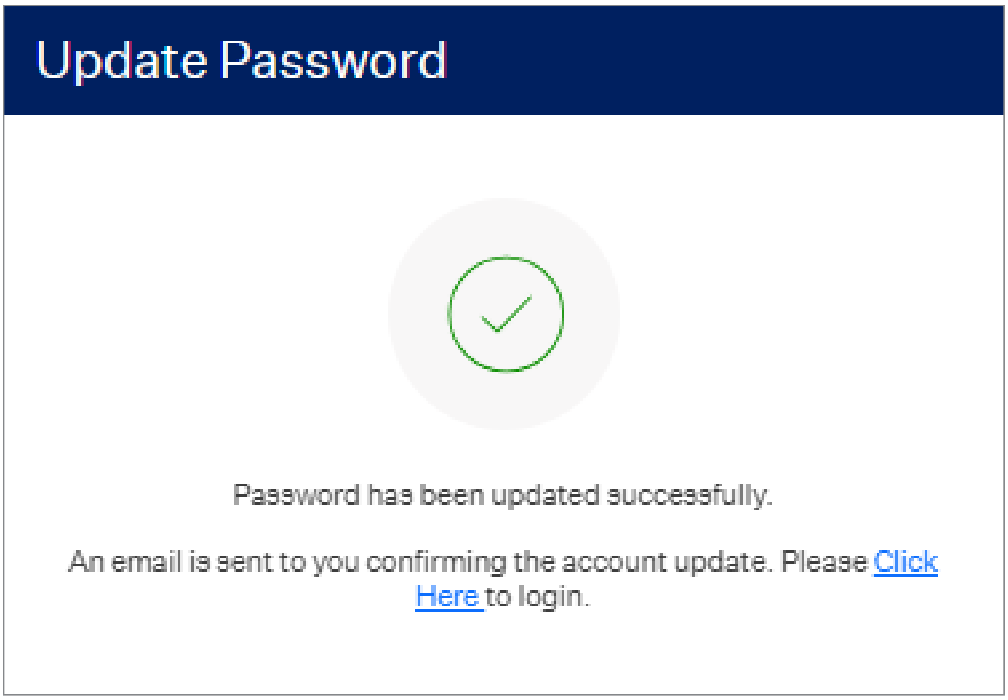

Figure 9

Provider Payments Login *(continued)*

First-Time Users *(continued)*

Logging in & Selecting MFA Preference

During your first-time login to the ECHO Provider Payments Portal, you will be prompted to select your "**Multi-Factor Authentication**" (MFA) preference ***(Figure 10)***. A "**Time based one-time passcode (TOTP)**" will be delivered to you by your chosen method. MFA options are described below:

1) **Authentication Mobile App**: TOTP is a time-based one-time passcode that will be displayed in your preferred Authenticator Application on your mobile device.
2) **Mobile Text SMS Number**: TOTP will be delivered via text message to a mobile phone number.
3) **Phone Call/Voice Number**: TOTP will be delivered via a phone call to a phone number.

For your chosen MFA method, fill in any needed information. Click the "**Select**" button and follow the prompts.

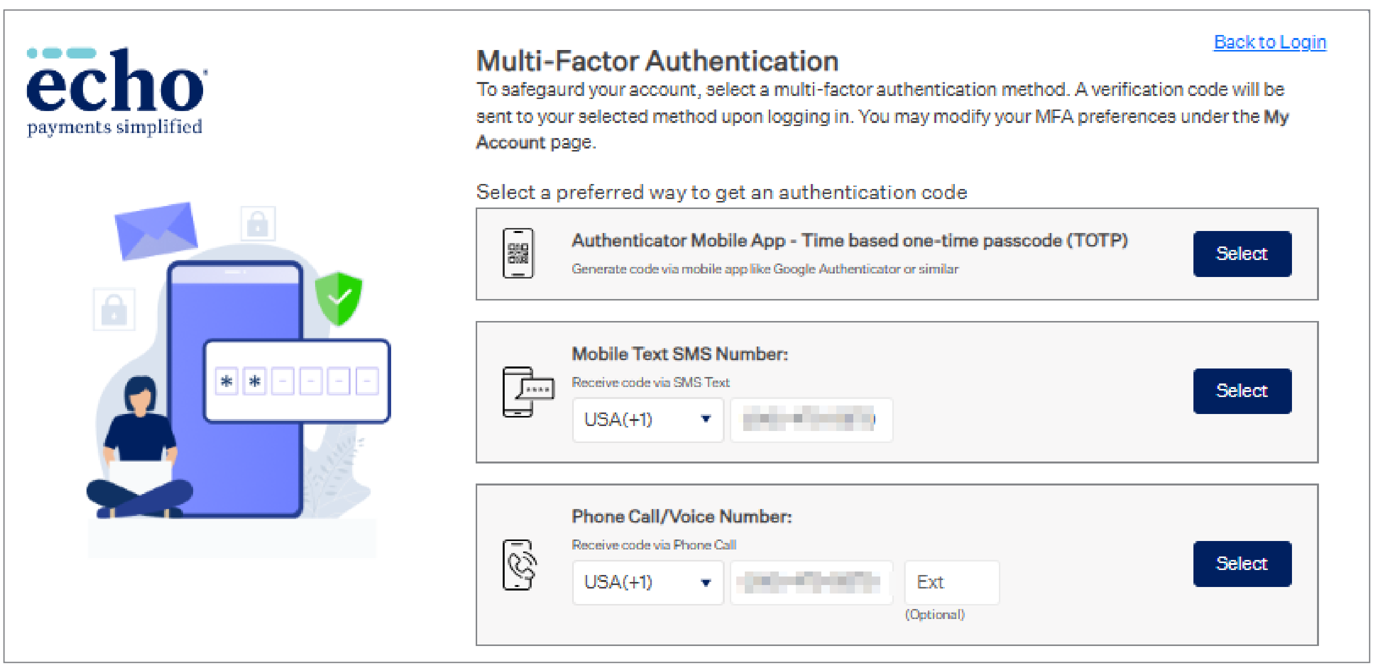

Figure 10

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Inquiry Page

When you have logged in, you will see the "**Inquiry Page**" that lists the most recent payment documents delivered via ECHO ***(Figure 11)***. You can also page back, allowing you to review your most recent documents.

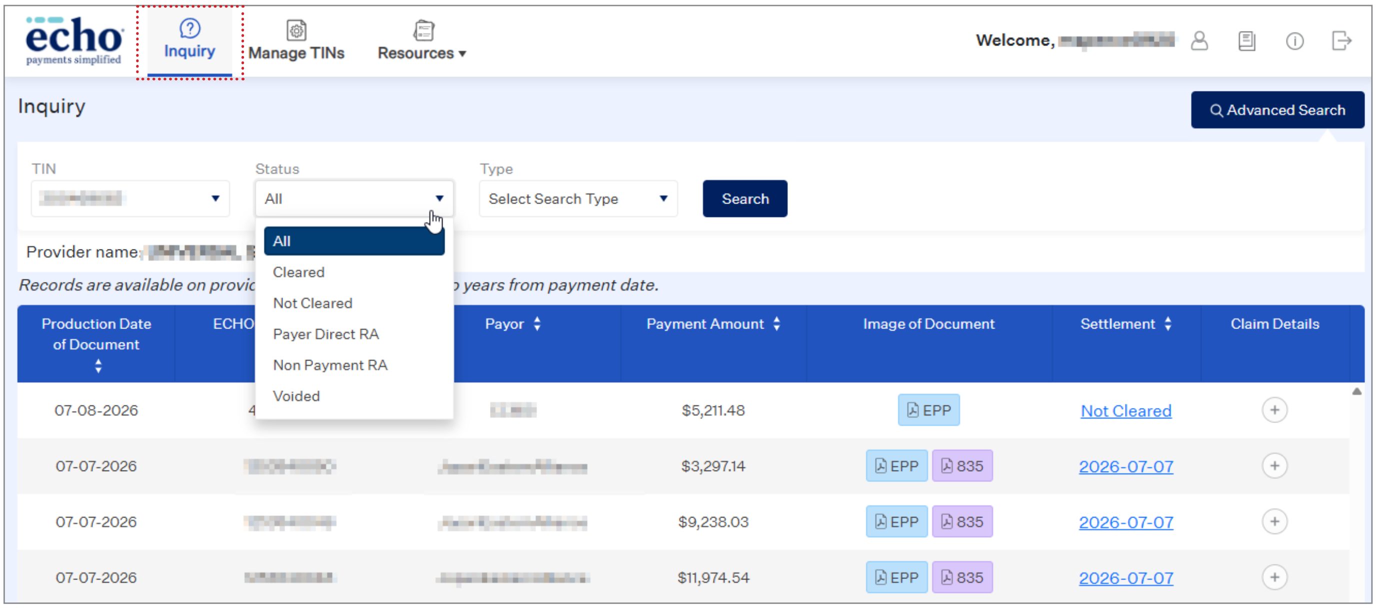

Figure 11

Additional capabilities include the following:

- Produce a printable PDF copy of the remittance by clicking on the "**EPP**" link.
- Select the "**835**" link to view the associated 835 file.
- View the settlement status (including an image of the cleared check for payments issued on paper) via the links in the "**Settlement**" column.
- Click on the dropdown arrow icon to expand and show claim details.

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Inquiry Page *(continued)*

Advanced Search

Choose the "**Advanced Search**" button on the "**Inquiry Page" *(Figure 11, previous page)*** to further narrow down your search results.

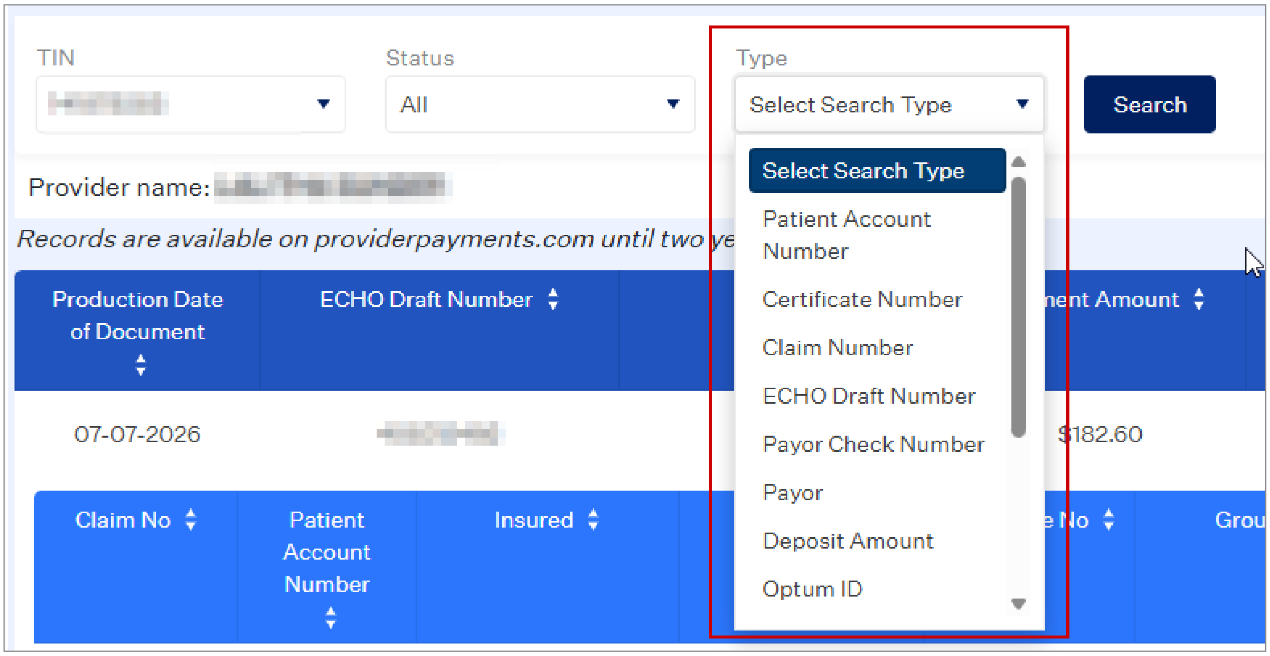

Figure 12

A dropdown menu in the "Advanced Search" *(Figure 12)* allows the user to Select Search Type (criteria):

- **Patient Account Number**
- **Certificate Number** (patient's insurance card number or SSN)
- **Claim Number**
- **ECHO Draft Number** (either the check number or the EFT number)
- **Payor Check Number** (check number assigned by TPA's adjudication system)
- **Deposit Amount** (total amount of the bulk check or electronic funds transfer)
- **Optum ID** (for payments sent by Optum)
- **Production Date** (not shown in above screenshot)
- **Claim Payment Date** (not shown in above screenshot)
- **Echeck Date** (not shown in above screenshot)

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Inquiry Page *(continued)*

Manage TINs

Users Posting Payments Issued to Multiple TINs

Manage the Tax IDs associated with your account by clicking the "**Manage TINs**" header menu bar. This will allow you to add or remove Tax IDs as shown in ***Figure 13***.

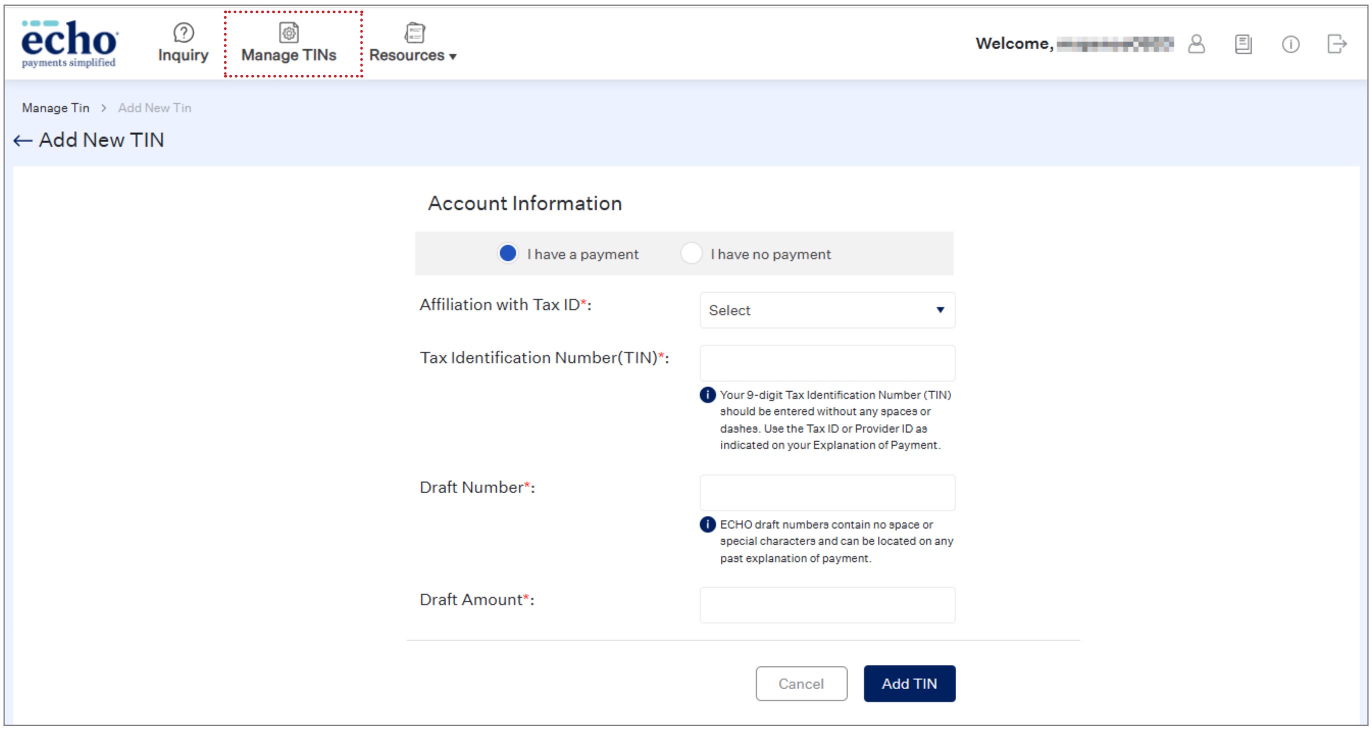

Figure 13

Choose the "**I have a payment**" button. The 9-digit TIN you wish to add must be entered without any spaces or hyphens (-). Enter the **ECHO Draft Number** and **Draft Amount** for a payment that was issued to the TIN you registered.

If you do not have a draft available, choose the "**I have no payment**" button. <u>**Note**</u>: You can set up a new TIN by entering its 9-digit number (no spaces or hyphens) and the "**Patient Account Number**".

Once you have successfully added the TIN, the "**Inquiry Page" *(Figure 11 page 9)*** will show the most recent claims across all of the **TIN**s registered to your username. The "**Advanced Search"** options will also search across all of the **TIN**s for which you are registered.

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Inquiry Page *(continued)*

Manage TINs *(continued)*

Remove Existing TINs From Your Account

Remove an existing **TIN** (Tax ID Number) that is no longer needed from your account by clicking the "**Remove**" button ***(Figure 14)***. Search for the **TIN** you wish you remove and select the **TIN** by clicking its checkbox (left). Click its "**Remove**" icon on the right to proceed or "**Cancel**" to cancel. These **TIN**s can be added back to your account clicking the "**+Add New TIN**" button once more, if needed.

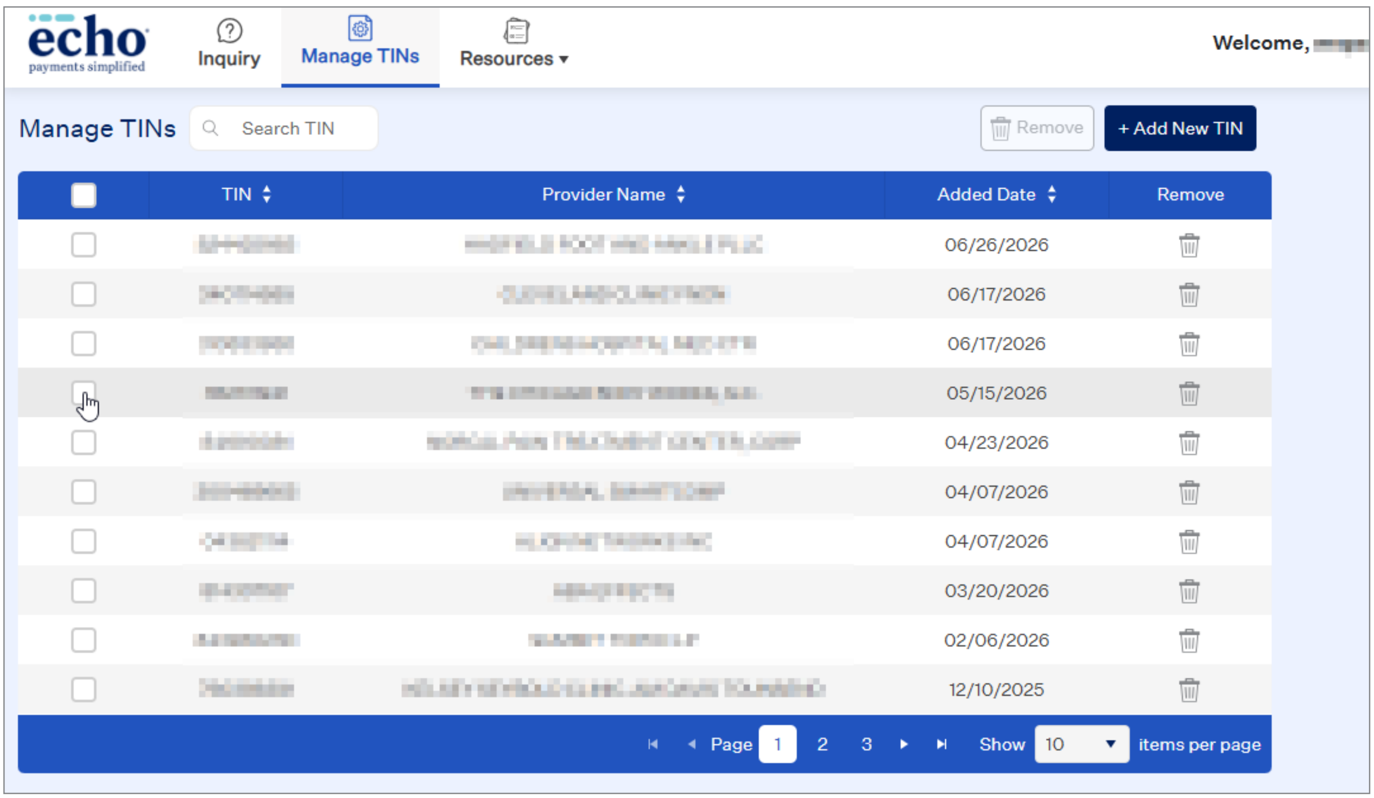

Figure 14

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Inquiry Page *(continued)*

Resources

Additional provider resources can be viewed by clicking the "**Resources**" tab on the top menu bar ***(Figure 15)***. **REMINDER**: Pop-up blockers must be disabled in your browser to allow this feature.

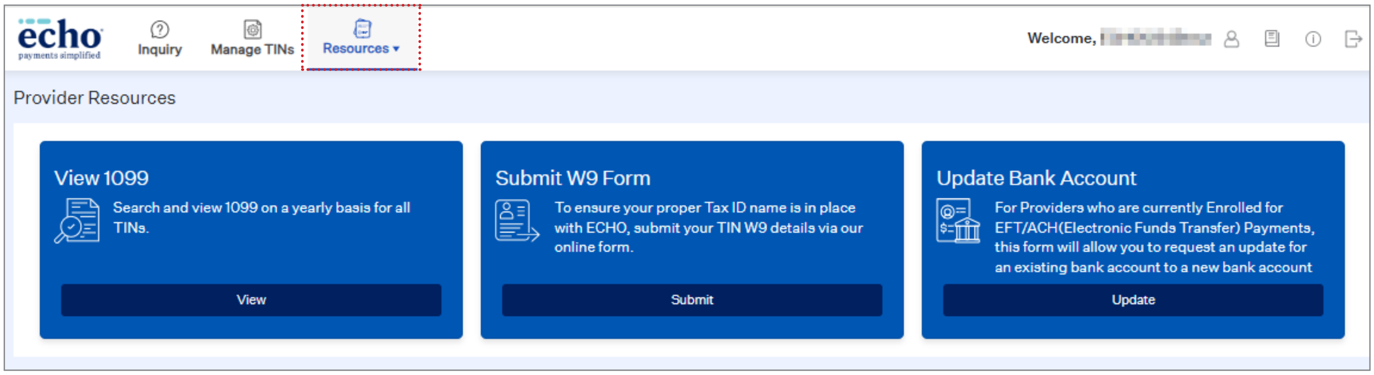
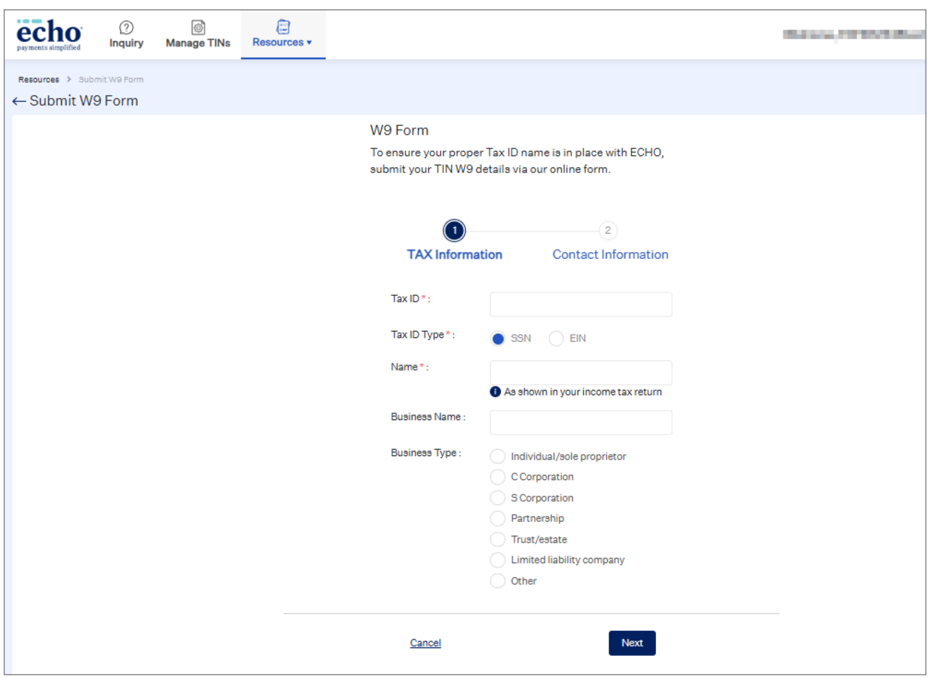


Figure 15

View 1099

Click “**View** ”in the blue "**View 1099**" block to see a list of all 1099s that have been issued to your **TIN**.

Submit W9 Form



Ensure your correct Tax ID name is in place with ECHO. Submit your TIN W9 details via our online form shown in ***Figure 16***.

Be sure to enter all required information (*). When the form is completed, click "**Next**."

Figure 16

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Inquiry Page *(continued)*

Resources *(continued)*

Submit W9 Form *(continued)*

Fill in all required (*) information ***(Figure 17)***. When the form is completed, click the "**Submit**" button.

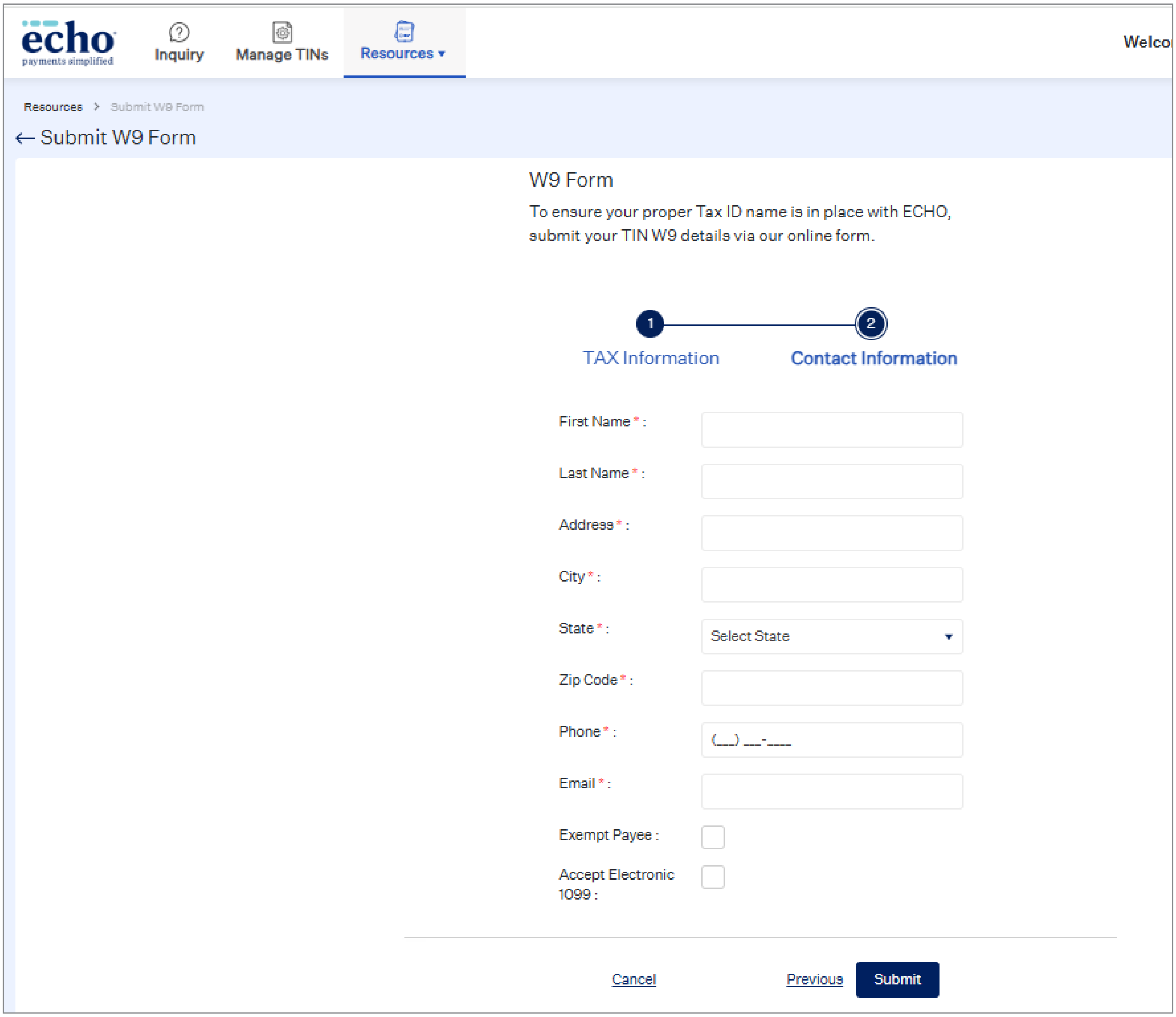

Figure 17

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Inquiry Page *(continued)*

Resources *(continued)*

Update Bank Account: Create New Request

For Providers who are currently enrolled for EFT/ACH(Electronic Funds Transfer) Payments, this form will allow request of an update of an existing bank account to a new bank account ***(Figure 18)***. Click the "**Create New Request**" button to initiate a request.

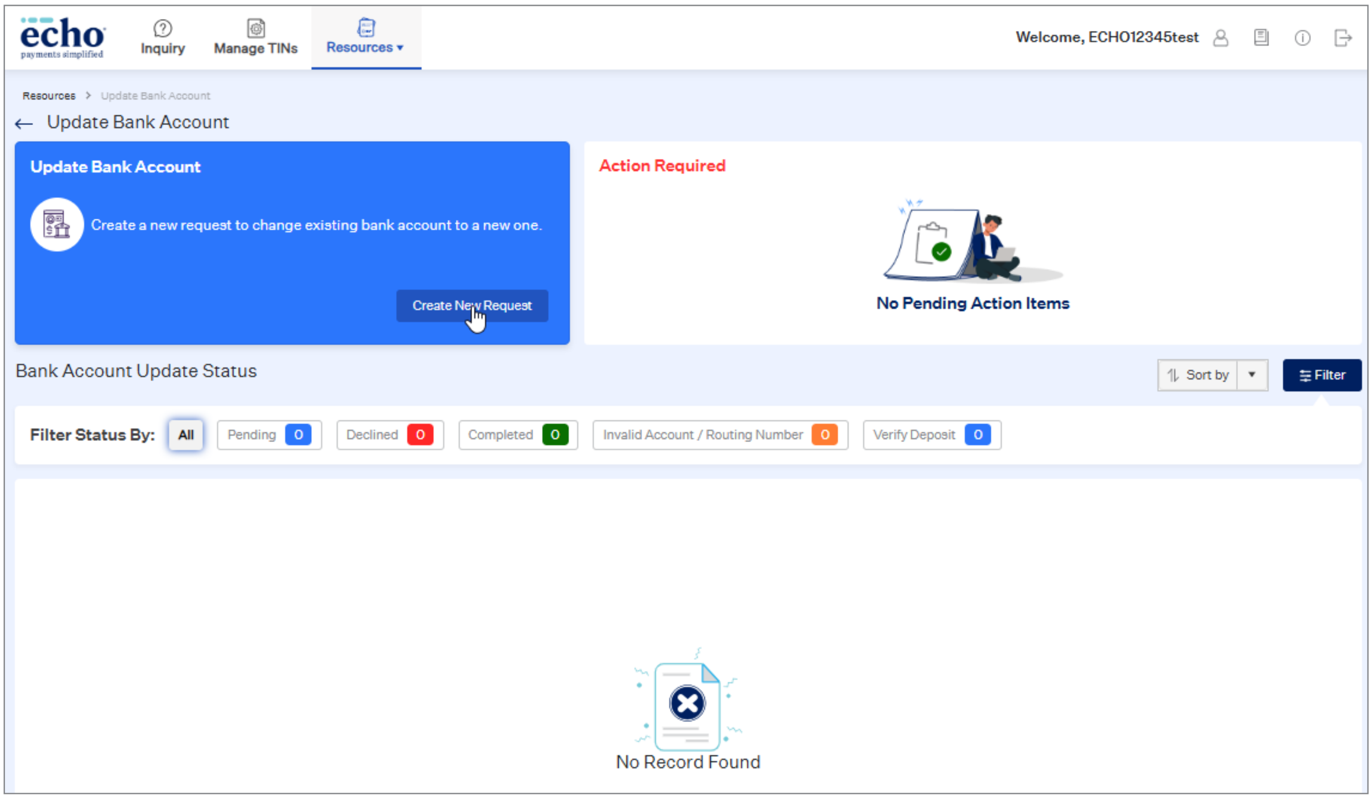

Figure 18

Inquiry Page *(continued)*

Resources *(continued)*

Update Bank Account: Create New Request *(continued)*

The screen shown in ***Figure 19*** will appear. Be sure to fill in all required information (*). When finished, click "**Next**."

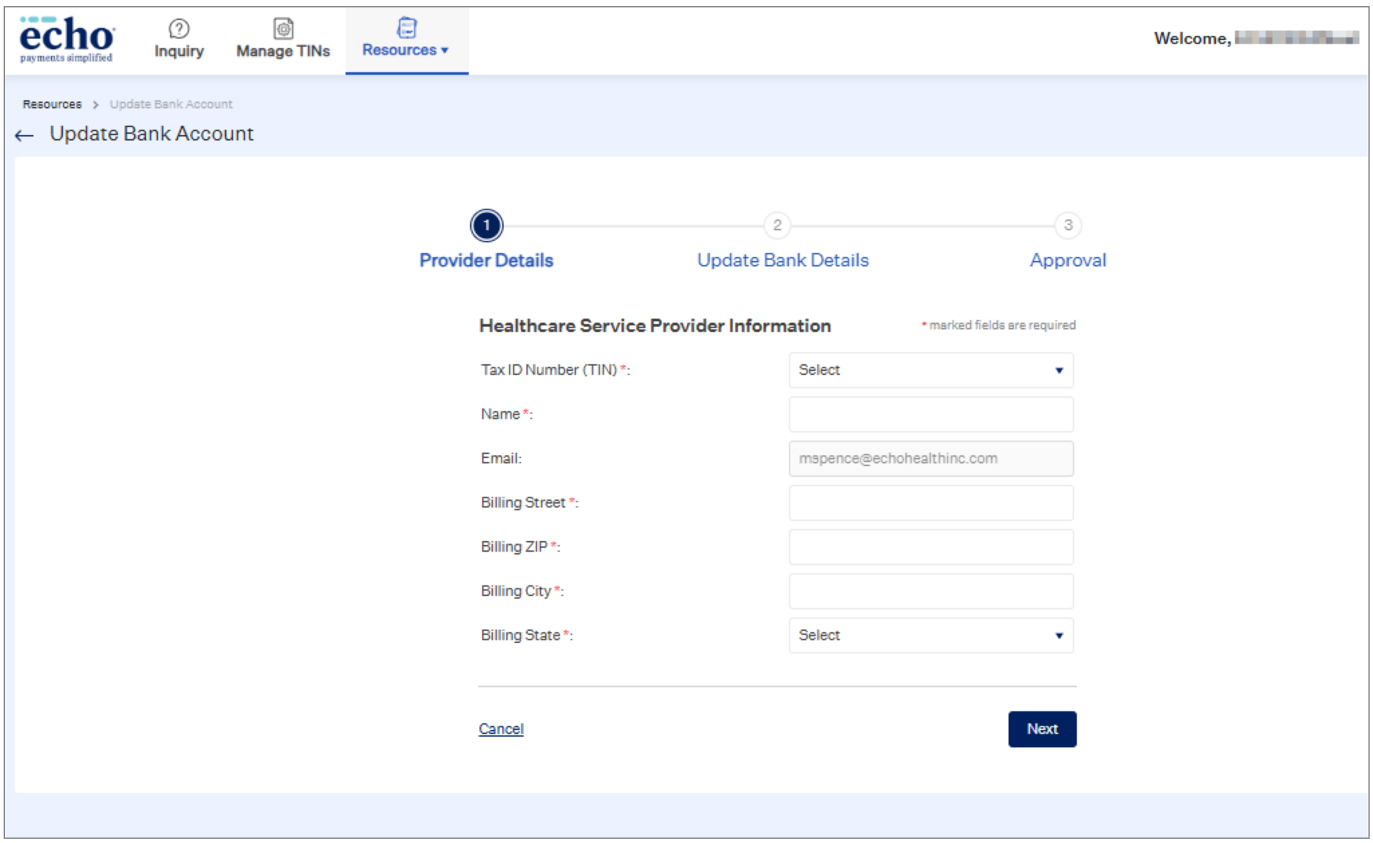

Figure 19

Inquiry Page *(continued)*

Resources *(continued)*

Update Bank Account: Create New Request *(continued)*

The screen shown in ***Figure 20*** will appear for you to "**Update Bank Details.**" Be sure to check the box, "**Authorize Terms & Conditions**," and to fill in all other required information (*). When finished, click "**Next**" to proceed to the next screen to complete this process (next page).

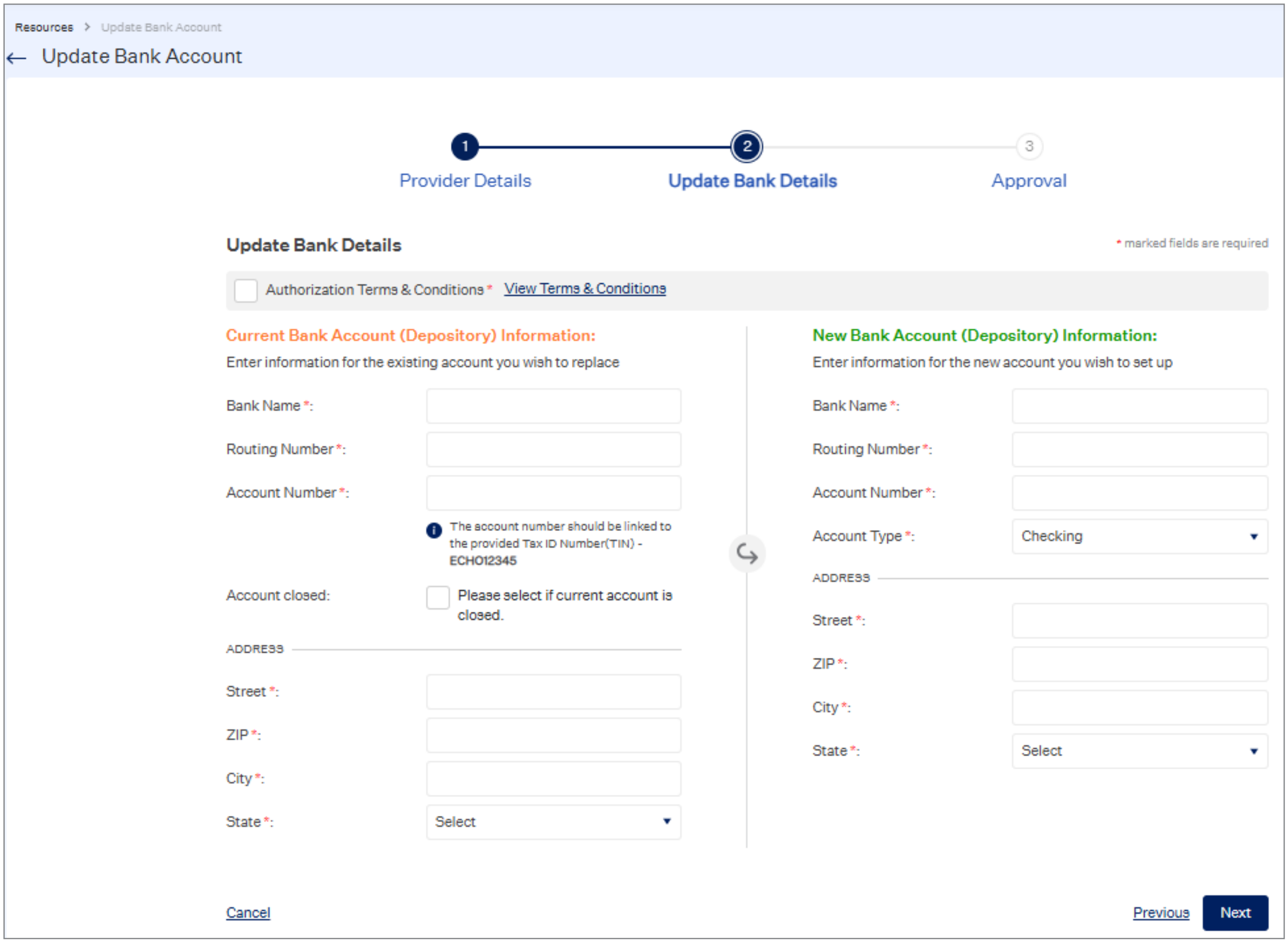

Figure 20

Inquiry Page *(continued)*

Resources *(continued)*

Update Bank Account: Create New Request *(continued)*

The screen shown in ***Figure 21*** will appear for "**Approval (by person holding Tax ID shown on this form)**." Be sure to fill in all other required information (*). When finished, click "**Submit**" to complete this process.

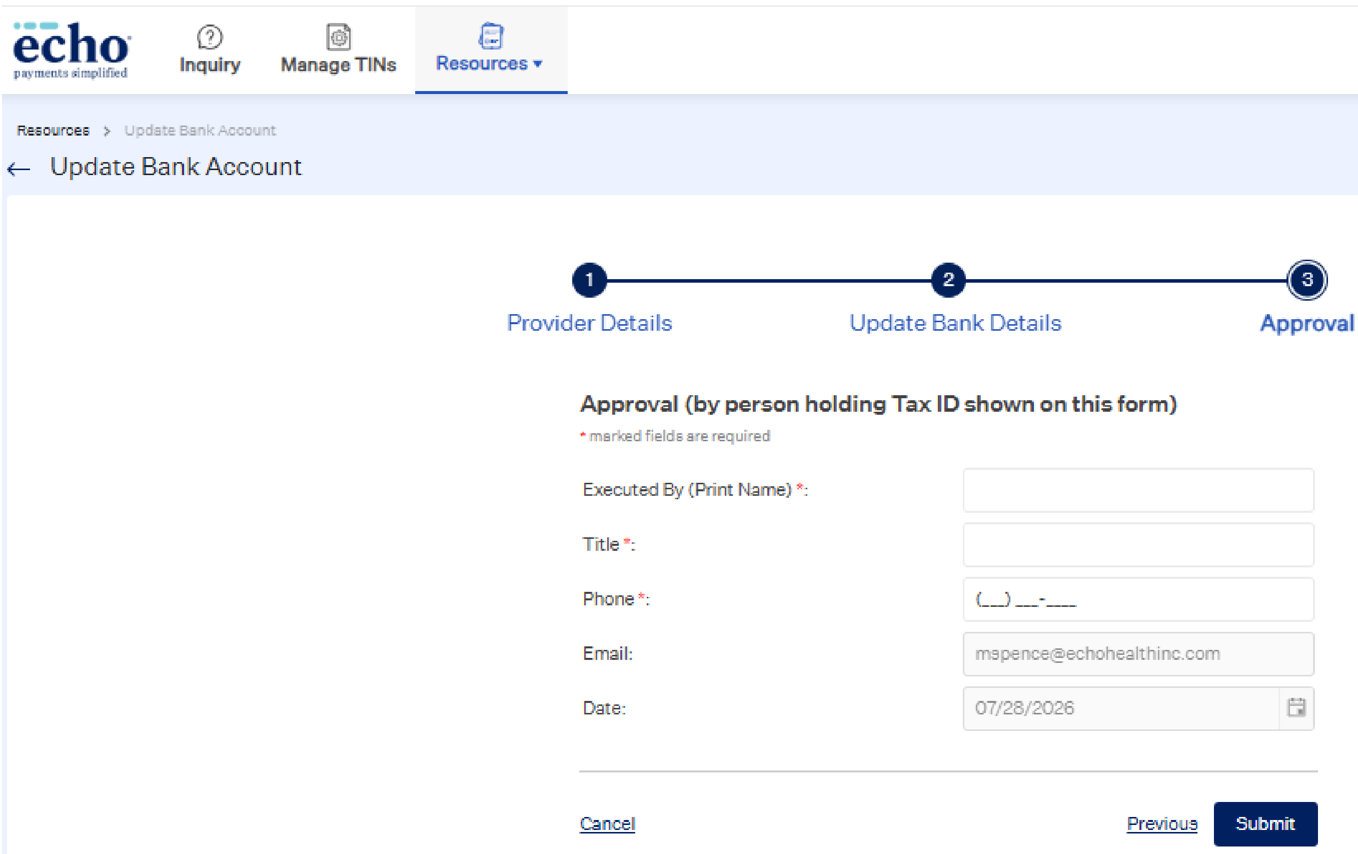

Figure 21

Update Bank Account: Filter Status By

If you have previously submitted "**Update Bank Account**" requests, you can the view status of these requests by clicking on a dropdown on the "**Filter Status By:**" bar ***(Figure 18, page 15)***.

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Inquiry Page *(continued)*

My Account

To update your password, account contact information and email preferences, select the "**My Account**" link from the top menu bar of the "**Inquiry Page**" ***(Figure 22)***. The screen shown in **Figure 23** will appear, allowing changes. When finished, click the "**Update**" button.

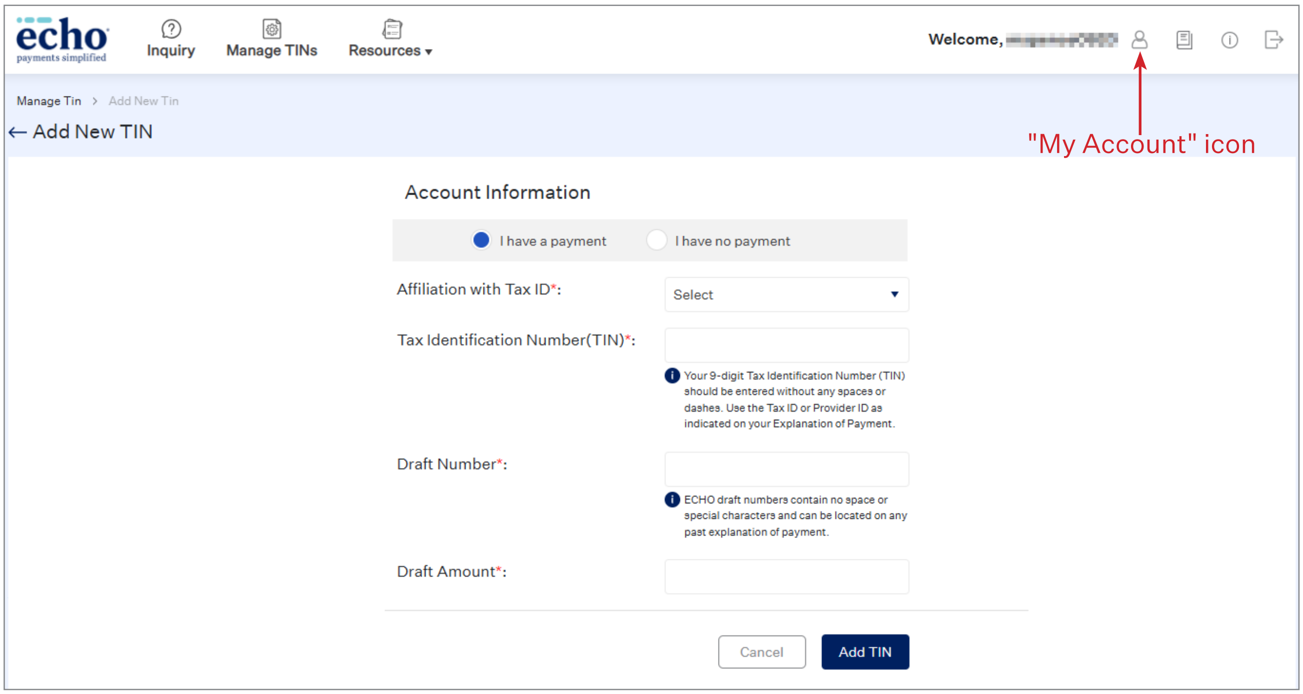

Figure 22

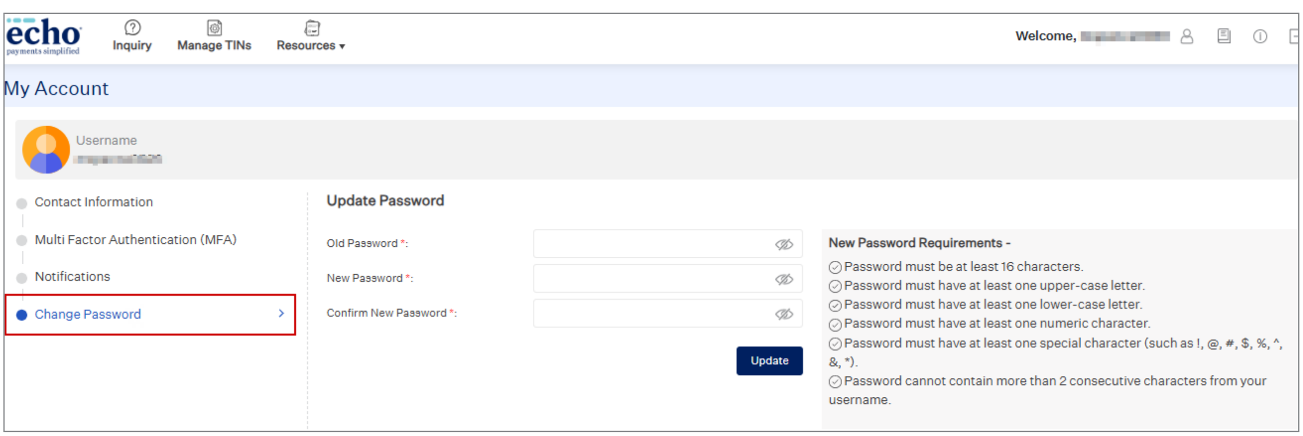

Figure 23

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