Payspan User Guide

Electronic Fund Transfer (EFT)
&
Electronic Remittance Advise (ERA)

Need Assistance? Payspan Provider Services Specialists are available at 1-877-331-7154 option 1
Monday - Friday from 8am to 8pm, Eastern Time.

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payspan.

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How to Register for Payspan once you have the reg code/PIN

- Go to www.payspanhealth.com and click the **Register Now** button.

- If you are registering for the very first time on Payspan, and you don't have a Registration Code, simply enter your NPI, TIN and Billing Zip Code and click **Submit**. (This feature is only available for first-time provider registration).

- Or, if you have a Registration Code enter it in the box on the right and click **Submit**.

New Enrollment

Get Started   Personal Info   Account Setup   Verify Your Info

Get Started

Welcome to PaySpan, where we are empowering the healthcare economy. PaySpan offers a solution that delivers el
more. This solution gives Providers access to remittance and claim details online, and straightforward reconciliation of

Choose one of the following options to begin your registration:

Already Registered?

National Provider Identifier (NPI)

Reg Code

What is a Reg Code?

Provider Federal Tax Identification Number (TIN) or Employer Indentification Number (EIN)

OR

Billing Zip Code (5 digits)

Submit   Submit

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Get Started/New Enrollment

- Providers that register with a Registration Code will also need to enter their PIN and TIN then click **Start Registration**. The registration code is not case-sensitive, but the PIN is case-sensitive. **Please note** if the Payspan registration code has an NPI associated to it, NPI will also be requested on the Get Started screen. Providers can click the "Atypical Service Provider" box to bypass entering the NPI to complete registration.

![PaySpan New Enrollment screen]

New Enrollment

| Get Started | Personal Info | Account Set Up | Verify Your Info |

Get Started

Welcome to PaySpan, where we are empowering the health care economy. PaySpan offers a solution that delivers electronic payments (ACH), electronic remittance advices Providers access to remittance and claim details online, and straightforward reconciliation of payments to reduce costs and improve cash flow.

RegCode:

Provider Identification Number (PIN):

Provider Federal Tax Identification Number (TIN) or Employer Identification Number (EIN)

National Provider Identifier (NPI):

☐ Atypical Service Provider

Start Registration

- Enter your Tax Identification Number (TIN) and Provider Identification Number (PIN)
- PIN errors? Try using all capital letters. PINs are case sensitive.
- An Atypical Service Provider is one that does not furnish health care services. Examples are taxi drivers, auto mechanics, and carpenters.
- Support
- How to Register
- Already Registered?

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Personal Info

- Enter your personal contact information and designate a user name and password.

Get Started — **Personal Info** — **Account Setup** — **Verify Your Info**

Tell Us About Yourself

Please provide us with your basic contact information to enable us to create a user account for you on the PaySpan Health system.

Provider Name: General Anesthesia
Provider Tax Identification Number: 88-8888888
National Provider Identifier: 9999999999

Provider Contact Name:

Administrators full name

Email Address:

Notifications will be sent to this address.

Confirm Email Address:

Telephone Number:

Please use the 000-000-0000 format.

Title:
Office Manager ▼

Username:

Minimum 8 characters and may include:
letters (a-z), numbers (0-9), dashes (-),
underscores (_), ampersats (@), periods (.)

Password:

Confirm Password:

Challenge Question:
In what city was your first job? ▼

Challenge Answer:

Next

Okefeno
Natior
Wildlife R

chua

Gainesv

Your IP a
used to a

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Account Setup

- Designate the bank account you wish to have funds deposited into and click the **Next** button to continue

New Enrollment

✅Get Started　✅Personal Info　| Account Setup |　Verify Your Info

Set Up Your Account

Provider Name: DrBarbaraSmith
Provider Tax Identification Number: 789357421
National Provider Identifier: 1234567890

Account Name

[　　　　　　　　　　]

This is the name that will be used to identify this receiving account throughout the PaySpan system.

Financial Institution Routing Number

[　　　　　　　　　　]

Provider's Account Number with Financial Institution

[　　　　　　　　　　]

Confirm Provider's Account Number with Financial Institution

[　　　　　　　　　　]

Type of Account at Financial Institution

[Business Checking ▼]

☑ Enable Electronic Payment

☐ Request Paper Remittance

☑ Assign new or additional Payers to this receiving account

[Back]　[Next]

Payer:
Fabrikam Insurance Company

PaySpan Health organizes your incoming payments into Receiving Accounts. The account that you enter will remain in a pending status until you obtain the small deposit made by PaySpan, Inc from your financial institution and enter the amount on your Home Screen.

Some payers allow providers to request paper remittances. If you would like paper remittances and your Payer supports this option, select the paper remittance check box. This check box will not appear if the Payer does not allow this option or appear grayed out if this option is not allowed upon EFT registration.

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Verify Your Info

- Review the information you entered and if correct, check the box to agree to the Services Agreement, Business Associate Agreement and click **Confirm**.

Confirm Your Payspan Account for Electronic Payments

If you registered for electronic payments, you will:

- Receive a deposit of less than one dollar from Payspan within a few business days and an email confirmation
- Contact your financial institution to obtain the amount
- Log into Payspan
- Click Your Payments
- Click the Account Verification link to activate your account
- The deposit does not need to be returned to Payspan
- Enter the amount using 0.00 format

(Note: If you are registering to view EOPs online only, not electronic payments, the above steps do not apply. The EOPs are available 24 hours after registration is completed).

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Home Page Dashboard

- Displays all applications available to the provider, including the free "Your Payments" app and other premium, subscription-based or payer-sponsored applications
- Displays alerts of new items for each application, such as New Payments available
- Your Payments will be the most frequently used application

Your Payments

- Displays a list of the provider's Payspan accounts that currently have new payments
- Click the Payment Count link to open the Research Payments screen and access posting reports, free mailbox capabilities and 835 downloads
- Navigate to the Research screens to search across 18 months of historical claim and payment data
- Navigate to the Manage screens where the provider can manage account preferences
- Displays alerts of new virtual card payments, payment invitations and pending accounts (provider initiated ACH bank account activation but has not yet confirmed the Payspan test deposit)

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New/Existing Users: Add Additional Registration Codes to your Payspan Account

From the Your Payment screen on homepage:

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Multi-Payer Provider Portal: Landing Page for requesting registration code:

Web Registration Code Request

Welcome to PaySpan and thank you for requesting registration information to receive electronic payment. You will receive a receipt email confirming your submission and we will return the requested information shortly. Fields marked with * are required.

Company Type

Provider

Provider Tax ID #*

Provider ID # (PIN)

Provider NPI

Provider or Practice Name*

3rd Party Company Name

Provider Phone Number*

3rd Party Phone Number

Email Address*

Registration Code Request Comments

Affected Payer*

ABPA - Culinary
Absolute Total Care
Aetna
Ambetter

*Select 'Other' if the payer name is not listed and add the name to the 'Registration Code Request Comments' field.

Provider Billing Address*

Provider Billing City*

Provider Billing State*

Provider Billing Zip Code*

Submit

Account Info

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Select an existing Payspan Receiving Account for the additional registration code, or click the Create New Receiving Account button to add a new receiving account.

NOTE: After clicking 'Confirm' the new code is considered successfully registered. If you have multiple registration codes to add you must repeat these steps.

Provider Mailbox

- Provides a list of 835 and PDF files available for download.
- PDF packages are a zip file of remittances in PDF format.
- 835 packages are bundled 835 files in the ANSI Version 5010X221A1.
- Files expire after 15 days if they are not deleted by the user.   After expiration, files may still be viewed or downloaded from the Research Payments screen.

Research Payments

- Options to search for claim payments across one or multiple payers
- View option opens a PDF of the payer-branded EOP
- Search results are exportable to Excel or the Posting Report

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Manage Accounts

- Lists all receiving Payspan accounts with access to free Mailbox configurations, additional registration Codes and Manage where can update registration preferences

Mailbox Settings

- Providers may use the free ftp mailbox to automatically auto-post to their practice management software.
- Files containing the PDFs of the remittance advices can be delivered to the mailbox as well.

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Delivery Settings

- After a mailbox is setup, providers have the option to have their 835 or PDF files automatically delivered to a Data Exchange Partner (DEP) or to the provider's mailbox.
- The View DEP Info link opens a list of Payspan's active Data Exchange Partners.
- The Delivery Settings screen is set up by Payer, and the list of DEPs will be limited by payer to only show the DEPs that accept 835s from the Payer.

Delivery Settings

Configure Delivery Endpoints:

You can configure your 835 and PDF files to be routed to one of a few different places. You can send files to your PaySpan mailbox or a Data Exchange Partner. PDFs can only be sent to your PaySpan mailbox at this time.

View DEP Info

Payer	835 Recipient	PDF Recipient
Excellus BlueCross BlueShield - Buffalo EXCELLUS BLUECROSS BLUESHIELD - Syracuse Indemnity EXCELLUS... more	None ▼	None ▼
ValueOptions, Inc. (MA - Massachusetts Behavioral Health Plan) ValueOptions, Inc. (MAPS – Maryland... more	None ▼	None ▼

Save **Cancel**

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Manage Users

- Only available to users with the User Administration security token.
- List of users defaults to show all active users associated with the Payspan account.
- Search for users by Username, Full Name or by User Status.
- Clicking a username in the list opens the Edit User screen.

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EMPOWERING THE HEALTHCARE ECONOMY™

Home > Admin   PaySpan5.0   Admin   Help   Log Out

Manage Users   + Add New User

Search Users:

Username:

Full Name:

Is Active:
Not Set

Search   Clear

|◀ ◀ Page 5 of 5 ▶ ▶| Displaying items 101 - 106 of 106.

Username	Full Name	Is Active	Last Login
PilbrydObO	Pillsbury Doughboy	false	4/24/2012
qauaPSH50	qauaPSH50	false	10/11/2012
qauaPSH50v2	qauaPSH50v2	false	4/8/2013
Secure123	Security Test Admin	true	
smtpayspan	Steve Tomas	false	6/30/2012
sys-5461	Test User	false	5/17/2012

|◀ ◀ Page 5 of 5 ▶ ▶| Displaying items 101 - 106 of 106.

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Create User

- Username must be between 8 and 50 characters long and may contain letters, numbers and some characters such as periods, hyphens, apostrophes, underscores and ampersats (@).
- Only one email address is required. A second email address may be added if there is another email address at which the user would like to receive notifications.
- At least one account must be selected.
- At least one feature must be selected.
- Once the required information is entered, selecting save sends an email to the user with a link for the user to create a password.
    - The link in the email expires after 48 hours.
    - If the link expires, the administrator will need to open the edit user screen and select the Password Reset button to have a new email delivered to the user.
    - Password must be at least 8 characters longs and include at least one letter and one number.

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Edit User

- The username is the only field that cannot be edited. If a different username is desired, a new user must be created.
- Selecting Password Reset sends the user an email with a link to create a new password.
  - The link in the email expires after 48 hours.
  - If the link expires, the administrator will need to select the Password Reset button again.

System Generated Emails

Welcome to PaySpan Health

From: donotreply@payspan.com [mailto:donotreply@payspan.com]
Sent: Monday, November 10, 2014 3:55 PM
To: QA
Subject: Welcome to PaySpan Health!

Congratulations, you have successfully registered to receive **Fabrikham Health** payments/remittance advices via PaySpan!

If you elected to receive payments via electronic funds transfer (EFT), additional steps are required to complete the activation of your account. Within a few business days an electronic payment of less than one dollar will be generated by PaySpan Inc. and delivered to the bank account specified during registration.

- Please obtain the deposit amount from your bank account, log in to your PaySpan account and enter the amount deposited by PaySpan.
- If the amount entered matches our payment records, your account will activate. If the amount entered does not match, contact Provider Services as indicated below.
- Please note: You do not need to return or re-pay this activation deposit amount.

If you elected not to register for EFT payments, your PaySpan account is activated and ready for online viewing of NON-EFT Payments. Keep in mind you can still activate to receive EFT payments at anytime. The advantages of receiving EFT payments include:

- Improve cash flow - Electronic payments can mean faster payments, leading to improvements in cash flow.
- Maintain control over bank accounts - You maintain total control over the destination of claim payment funds. Multiple practices and accounts are supported.

Thank you for using PaySpan.

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Account Activation Reminder

From: providersupport@payspanhealth.com [mailto:providersupport@payspanhealth.com]
Sent: Monday, November 10, 2014 3:20 PM
To: QA
Subject: PaySpan Account Activation Reminder

Receiving Account: My Test Account

Our records indicate that your office began the registration process but did not complete the final stage. In order to complete this process, there are a few additional steps that will need to be completed.

Please follow the steps listed below to complete your registration process:

1. Locate the amount deposited by PaySpan from your financial institution and return to www.payspanhealth.com/nps/login.aspx .
2. Log-in to your PaySpanHealth.com account.
3. Click the Your Payments icon.
4. Click the Account Verification link in the Alerts section.
5. Click the Verify Account link for the account you wish to activate.
6. Enter the deposit amount in the deposit amount field using the 0.00 format.
7. Click Save.

Once you have completed the above mentioned steps you will begin to receive payments electronically and have the ability to view your remittance details online within 24 hours.

If you need additional assistance, please contact us by dialing 877-331-7154.

Thank you for using PaySpan.

Provider Services and Delivery
1-877-331-7154
www.payspanhealth.com

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Subject: PaySpan Account Activation Reminder

Receiving Account: My Test Account

Payer: Fabrikham Health

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3. Click the Your Payments icon.
4. Click the Account Verification link in the Alerts section.
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Provider Services and Delivery
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Payment Notification ACH Payment

From: donotreply@payspan.com [mailto:donotreply@payspan.com]
Sent: Monday, November 10, 2014 3:26 AM
To: QA
Subject: Payment Notification

PAYMENT NOTIFICATION

Payment from:	**Fabrikham Health**
Payment to:	**CONTOSO HEALTHCARE SYSTEMS**
Payment Method:	**ACH**
ACH: Automated Clearing House, often called EFT or electronic funds transfer.	
Effective Date:	**11/10/2014**
Check/EFT number:	**1234567890**
Amount:	**$167,963.73**

Click on the following link to review detailed payment information on all of your new payments: https://www.payspanhealth.com.

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Need Assistance?

Please call Payspan Provider Services

1-877-331-7154 option 1

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