

# Payspan User Guide

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



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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 Acc	count Setup Verify Your Info
Get Started	
Welcome to PaySpan, where we are empowering the healthcomore. This solution gives Providers access to remittance and of	
Choose one of the following options to begin your registration:	
Already Registered?	
National Provider Identifier (NPI)	Reg Code
Provider Federal Tax Identification Number	What is a Reg Code?
(TIN) or Employer Indentification Number (EIN)	
	OR .
Billing Zip Code (5 digits)	
Submit	Submit



## **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 <sub>®</sub>	E
New Enrollment	
Get Started Personal Info	Account Set Up Verify Your Info
Get Started	
	e health care economy. PaySpan offers a solution that delivers electronic payments (ACH), electronic remittance advices ine, and straightforward reconciliation of payments to reduce costs and improve cash flow.
RegCode:	Enter your Tax Identification Number (TIN) and     Provider Identification Number (PIN)
Provider Identification Number (PIN):	<ul> <li>PIN errors? Try using all capital letters. PINs are case sensitive.</li> </ul>
Provider Federal Tax Identification Number (TIN) or Employer Identification Number (EIN)	<ul> <li>An Atypical Service Provider is one that does not furnish health care services. Examples are taxi drivers, auto mechanics, and carpenters.</li> </ul>
National Provider Identifier (NPI):	Support
	How to Register
Atypical Service Provider	Already Registered?
Start Registration	



### **Personal Info**

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

	Personal Info	Account Setup	Verify Your Info	
Tell Us About You	rself			
Please provide us with you	ır basic contact information to	o enable us to create a user a	account for you on the PaySpan	Health system.
Provider Name: General Provider Tax Identificati National Provider Identif	on Number: 88-8888888			
Provider Contact Name:		Username:		Okefend Nation
Administrators full name Email Address:		Minimum 8 characters a letters (a-z), numbers (underscores (_), amper	0-9), dashes (-),	Wildlife R
Notifications will be sent to	this address.	Password:		
Confirm Email Address:		Confirm Password:		
Telephone Number:		Challenge Question:		chua
Please use the 000-000-00	000 format.	In what city was you Challenge Answer:	ır first job? ▼	Gaines
Title:				
Office Manager	•	Next		Your IP ac used to a



### **Account Setup**

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

New Enrollment			
	Personal Info	Account Setup	Verify Your Info
Set Up Your Accoun	t		
Provider Name: DrBarbaraS Provider Tax Identification National Provider Identifier	Number: 789357421		
Account Name			Payer: Fabrikam Insurance Company
This is the name that will be throughout the PaySpan syst	•	iving account	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.
Financial Institution Routin	ng Number		Some payers allow providers to request paper remittances. If you would
Provider's Account Number	er with Financial Institut	ion	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.
Confirm Provider's Accour	nt Number with Financia	al Institution	
Type of Account at Financi Business Checking	ial Institution		
Enable Electronic Paym	nent		
Request Paper Remitta	nce		
Assign new or addition  Back Next	al Payers to this receivi	ng account	



## **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:

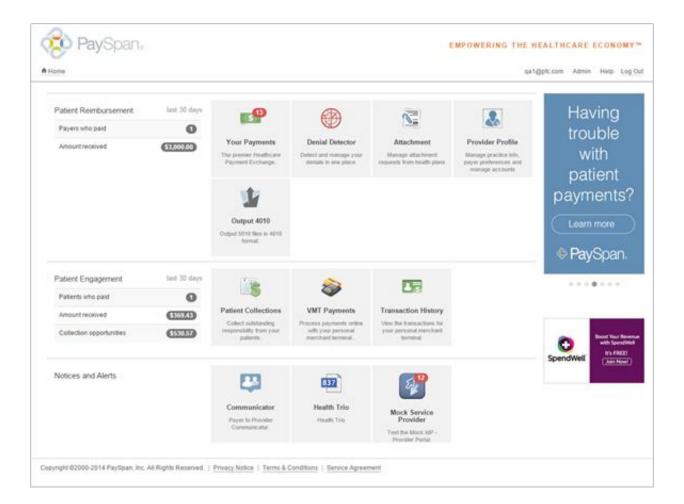
- Receive a deposit of less than one dollar from Payspan within a few business days and an email confirmation
- Contact your financial institution to obtain the amount
- Log into Payspan
- Click Your Payments
- Click the Account Verification link to activate your account
- The deposit does not need to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



## **Home Page Dashboard**

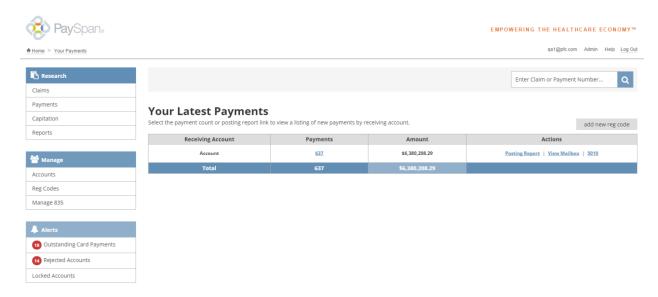
- Displays all applications available to the provider, including the free "Your Payments" app and other premium, subscription-based or payer-sponsored applications
- Displays alerts of new items for each application, such as New Payments available
- Your Payments will be the most frequently used application





## **Your Payments**

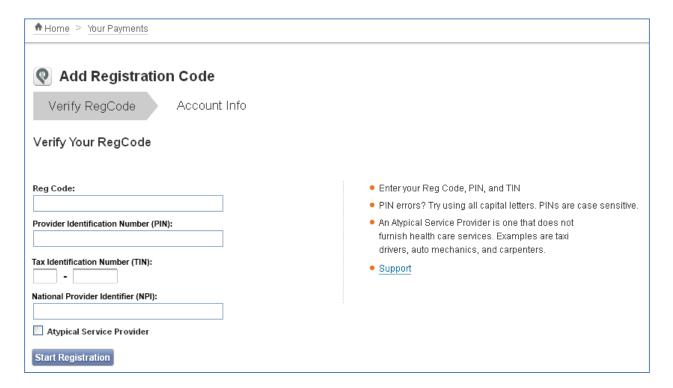
- Displays a list of the provider's Payspan accounts that currently have new payments
- Click the Payment Count link to open the Research Payments screen and access posting reports, free mailbox capabilities and 835 downloads
- Navigate to the Research screens to search across 18 months of historical 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)





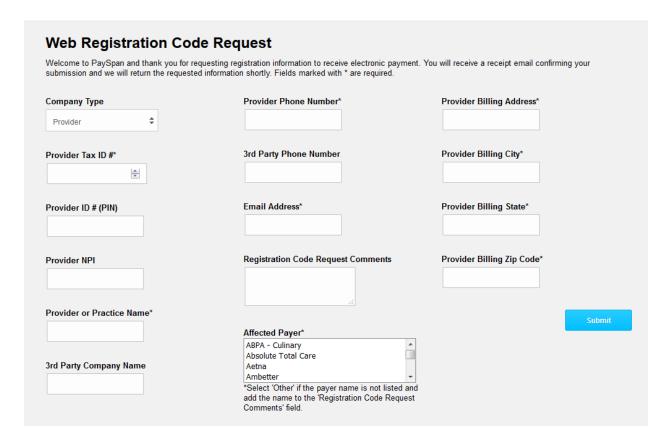
## New/Existing Users: Add Additional Registration Codes to your Payspan Account

From the Your Payment screen on homepage:





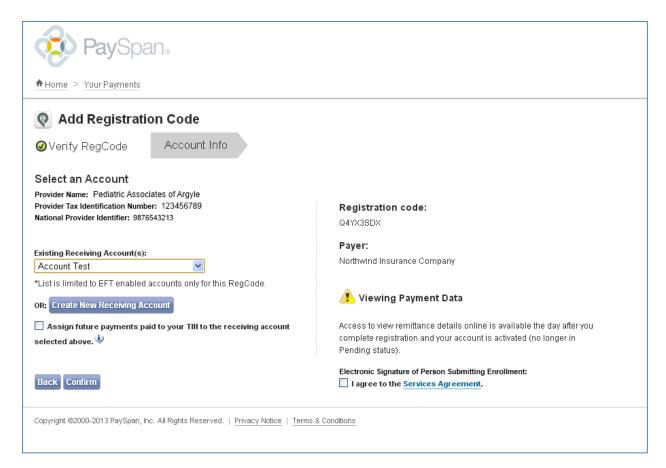
## Multi-Payer Provider Portal: Landing Page for requesting registration code:



#### **Account Info**



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.

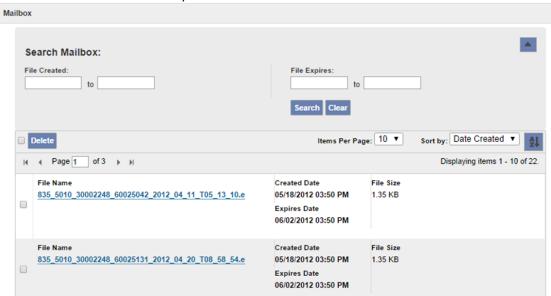


NOTE: After clicking 'Confirm' the new code is considered successfully registered. If you have multiple registration codes to add you must repeat these steps.



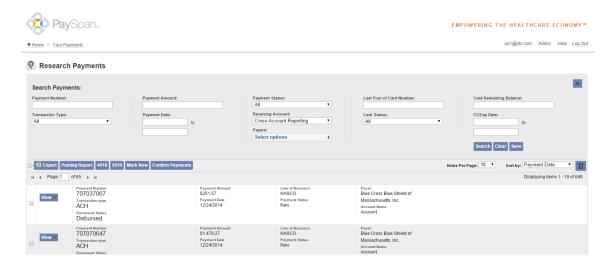
## **Provider Mailbox**

- 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

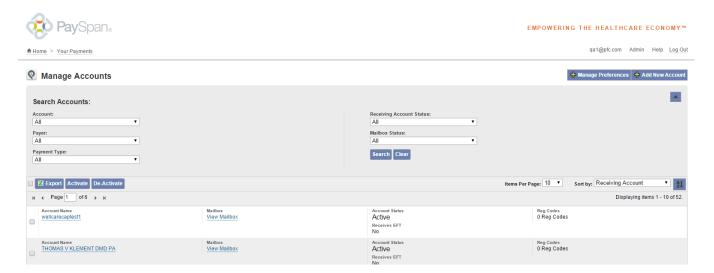


Need Assistance? Payspan Provider Services Specialists are available at 1-877-331-7154 option 1 Monday - Friday from 8am to 8pm, Eastern Time.



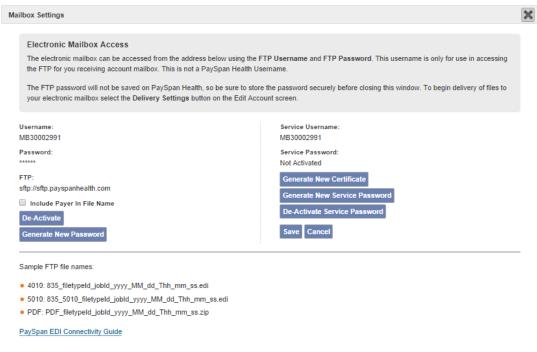
## **Manage Accounts**

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.

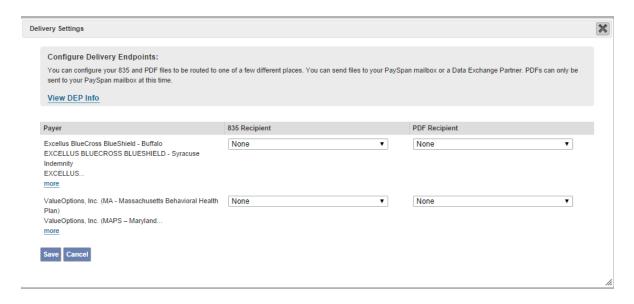


11.



## **Delivery Settings**

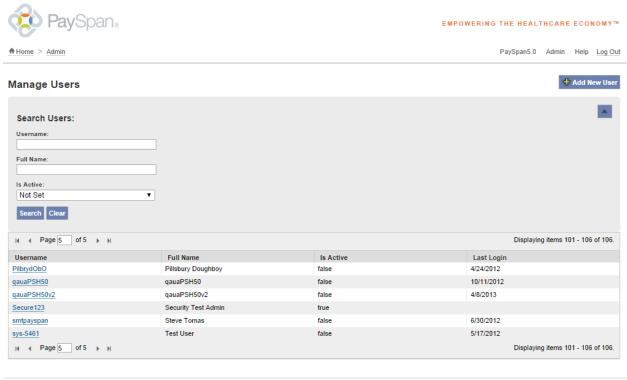
- After a mailbox is setup, providers have the option to have their 835 or PDF files automatically delivered to a Data Exchange Partner (DEP) or to the provider's mailbox.
- The View DEP Info link opens a list of Payspan's active Data Exchange Partners.
- The Delivery Settings screen is set up by Payer,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





## **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.

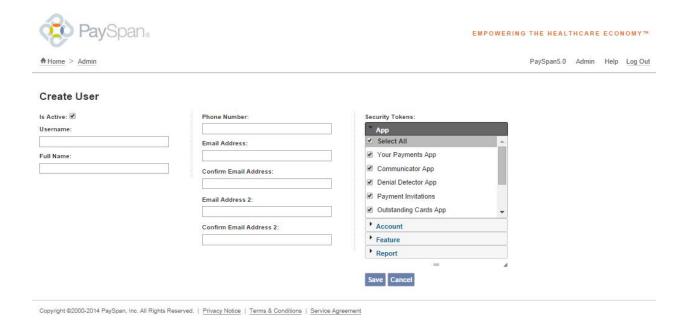


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#### **Create User**

- 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.
  - o 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.
  - o Password must be at least 8 characters longs and include at least one letter and one number.

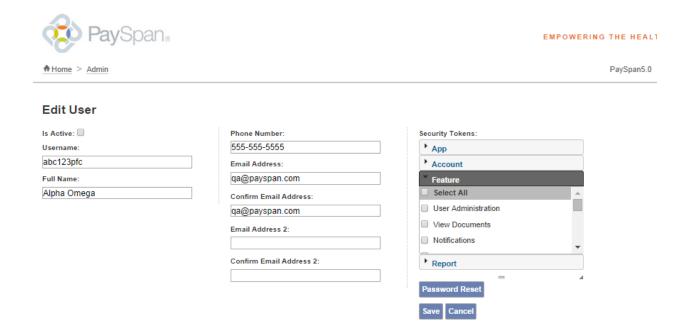


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## **Edit User**

- 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.
  - o 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 PaySpanl

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.



#### **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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Thank you for using PaySpan.

Provider Services and Delivery 1-877-331-7154

www.payspanhealth.com



## 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.



## Need Assistance?

## Please call Payspan Provider Services

1-877-331-7154 option 1

Monday - Friday from 8am- 8pm, Eastern Time.