

# Payments Portal

## *Training Guide*

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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

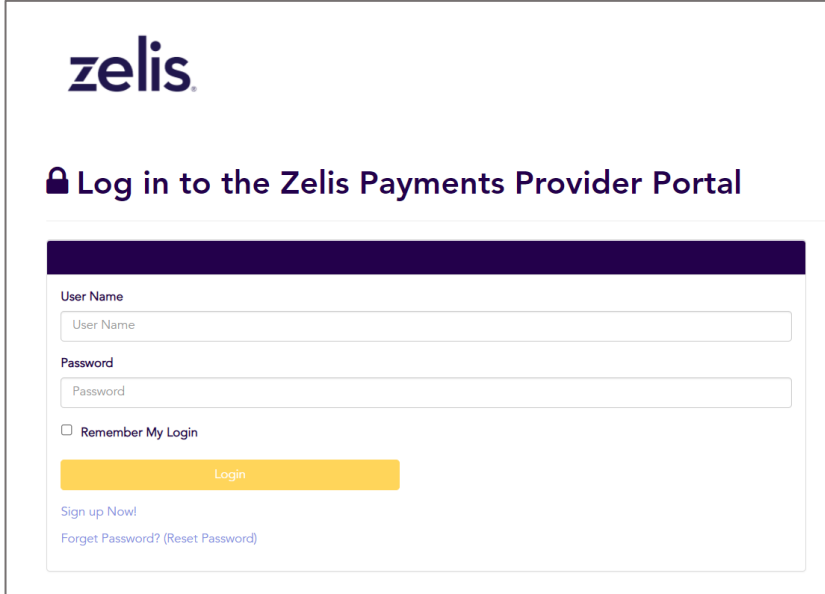
There is no pre-requisite knowledge needed prior to using this guide.

## 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.

# *Accessing the Portal*

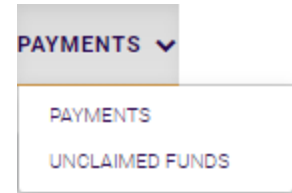
The portal can be accessed via <https://Provider.zelispayments.com>.



The screenshot shows the login interface for the Zelis Payments Provider Portal. At the top left is the Zelis logo. Below it is a heading "Log in to the Zelis Payments Provider Portal" with a lock icon. The login form includes a "User Name" field, a "Password" field, and a "Remember My Login" checkbox. A yellow "Login" button is positioned below the password field. At the bottom of the form are links for "Sign up Now!" and "Forget Password? (Reset Password)".

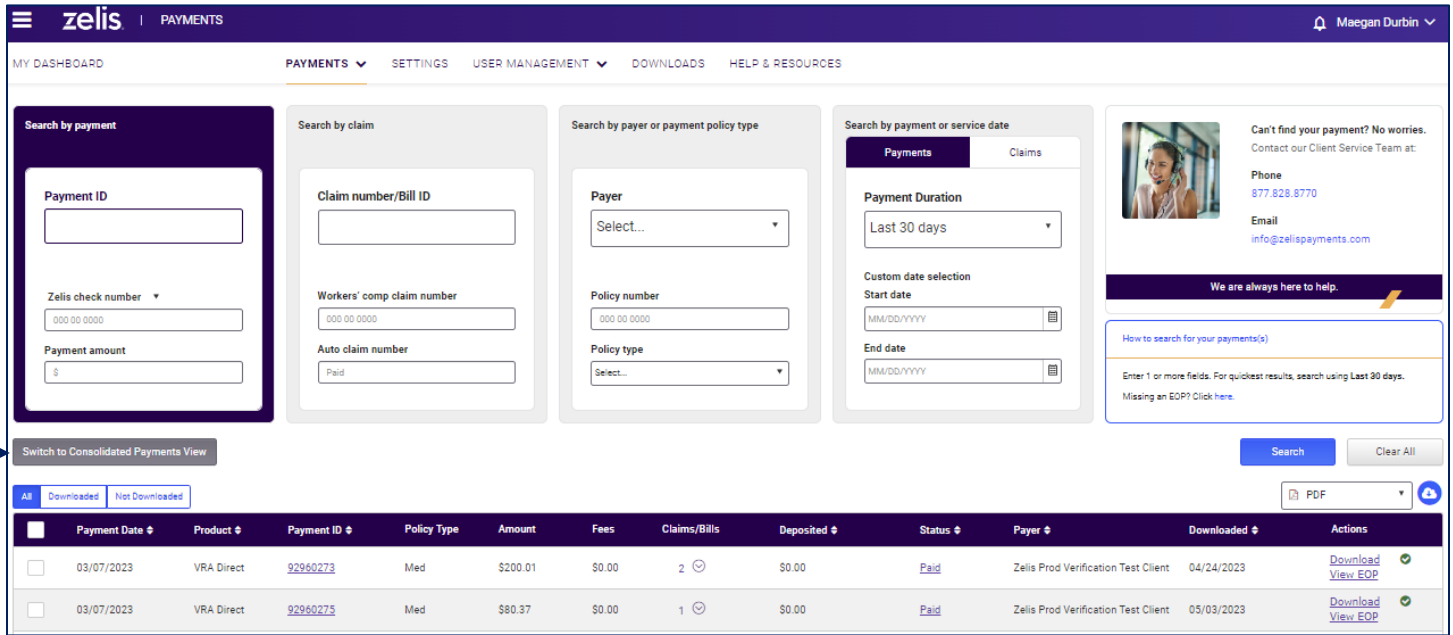
# Searching for Payments

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



## Payments

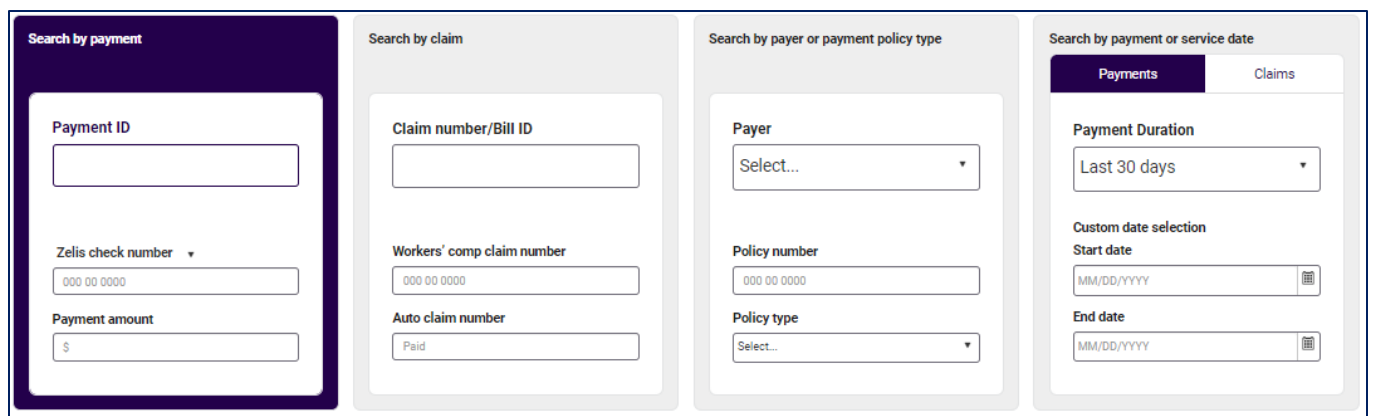
The Payments page enables you to search for your payments in a number of convenient ways. The payment details and EOP are all accessible here.



The screenshot shows the Zelis Payments dashboard. At the top, there's a navigation bar with 'zelis | PAYMENTS' and a user profile for 'Maegan Durbin'. Below the navigation bar, there are several search filters: 'Search by payment' (highlighted with a red box), 'Search by claim', 'Search by payer or payment policy type', and 'Search by payment or service date'. The 'Search by payment' filter includes fields for 'Payment ID', 'Zelis check number', and 'Payment amount'. The 'Search by claim' filter includes 'Claim number/Bill ID', 'Workers' comp claim number', and 'Auto claim number'. The 'Search by payer or payment policy type' filter includes 'Payer', 'Policy number', and 'Policy type'. The 'Search by payment or service date' filter includes 'Payment Duration', 'Custom date selection', 'Start date', and 'End date'. Below the filters, there's a 'Switch to Consolidated Payments View' button. A table of payment results is displayed below the filters, with columns for 'Payment Date', 'Product', 'Payment ID', 'Policy Type', 'Amount', 'Fees', 'Claims/Bills', 'Deposited', 'Status', 'Payer', 'Downloaded', and 'Actions'. The table shows two payment records for 'VRA Direct' on '03/07/2023'.

*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".





This image is a close-up view of the search filters in the Zelis Payments dashboard. It shows four main search categories: 'Search by payment', 'Search by claim', 'Search by payer or payment policy type', and 'Search by payment or service date'. The 'Search by payment' filter is highlighted with a red box. The 'Search by payment or service date' filter has a dropdown menu with 'Payments' selected and 'Claims' as an alternative option. The 'Payment Duration' dropdown is set to 'Last 30 days'. The 'Custom date selection' section includes 'Start date' and 'End date' fields with calendar icons.

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

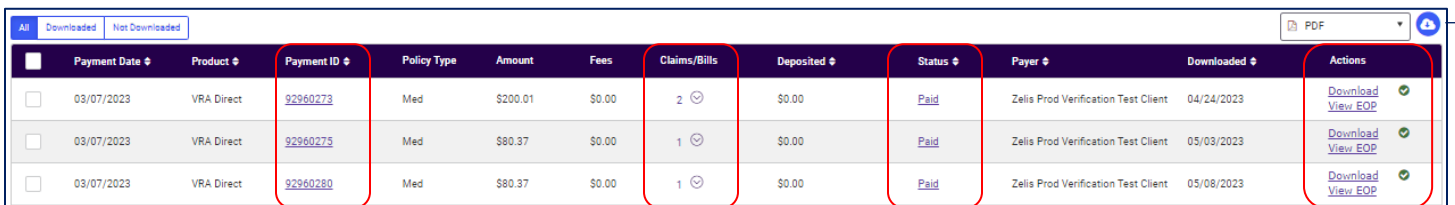








Also, note that many of the columns are sortable by clicking the column name. This makes it easy to sort by Date, Status, Payer, etc.

Status	Payer	Downloaded	Actions
<a href="#">Paid</a>	Zelis Prod Verification Test Client	04/24/2023	<a href="#">Download</a>  <a href="#">View EOP</a>
<a href="#">Paid</a>	Zelis Prod Verification Test Client	05/03/2023	<a href="#">Download</a>  <a href="#">View EOP</a>

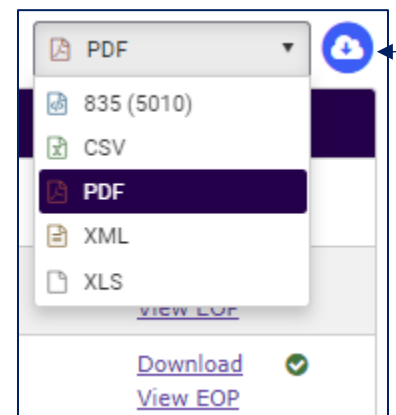
The "Payment ID" and "Status" column's hyperlinks provide payment details, while the "Actions" column link provides the option to download the Explanation of Payment (EOP). Clicking within the "Claims/Bills" column will provide the details of the claims paid by that payment.

*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.*



Payment Date	Product	Payment ID	Policy Type	Amount	Fees	Claims/Bills	Deposited	Status	Payer	Downloaded	Actions
03/07/2023	VRA Direct	<a href="#">92960273</a>	Med	\$200.01	\$0.00	2 	\$0.00	<a href="#">Paid</a>	Zelis Prod Verification Test Client	04/24/2023	<a href="#">Download</a>  <a href="#">View EOP</a>
03/07/2023	VRA Direct	<a href="#">92960275</a>	Med	\$80.37	\$0.00	1 	\$0.00	<a href="#">Paid</a>	Zelis Prod Verification Test Client	05/03/2023	<a href="#">Download</a>  <a href="#">View EOP</a>
03/07/2023	VRA Direct	<a href="#">92960280</a>	Med	\$80.37	\$0.00	1 	\$0.00	<a href="#">Paid</a>	Zelis Prod Verification Test Client	05/08/2023	<a href="#">Download</a>  <a href="#">View EOP</a>

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).



## 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 Details: ID 92960273** ✕

Product: VRA Direct  
 Date of Payment: 3/3/2023  
 Amount: \$200.01  
 Paid Amount: \$0.00  
 Fees: \$0.00  
 TRN: 1\*92960273\*111113335  
 Payment Details: Processed - Paid 3/7/2023

	Payment Date	Product	Payment ID	Policy Type	Amount	Fees	Claims/Bills	Deposited
<input type="checkbox"/>	03/07/2023	VRA Direct	<a href="#">92960273</a>	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	AXadeilnorr	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.

**PAYMENTS** ▾

PAYMENTS

UNCLAIMED FUNDS

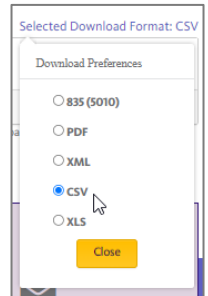
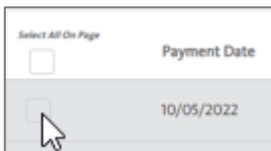
# Viewing Downloads

The *Downloads* page is utilized to download batches of Virtual Credit Cards (VCC) or ERAs. A batch download occurs when there are many files or pages included in a download. Once a file has been downloaded, it will remain visible on this page **for 24 hours** (though you can always download a file again from the Payments page). You can select individual payments or all that display on the page.

Select All On Page	Payment Date	Payments Count	Sum of Payments	Actions
<input type="checkbox"/>	10/05/2022	1	\$2.64	<a href="#">Download</a> <a href="#">View Paym</a>
<input type="checkbox"/>	09/14/2022	3	\$75.00	<a href="#">Download</a> <a href="#">View Paym</a>
<input type="checkbox"/>	08/01/2022	1	\$325.50	<a href="#">Download</a> <a href="#">View Paym</a>
<input type="checkbox"/>	05/12/2022	1	\$0.00 *	<a href="#">Download</a> <a href="#">View Paym</a>

You can download payments as 835, PDF, XML, CSV or XLS formats. While most options are obvious, exporting to a spreadsheet can behave a bit differently depending on your computer's configurations. This section walks you through the steps for downloading as CSV.

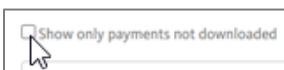
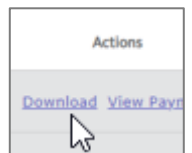
1. From the **Downloads page**, click the **Selected Download Format hyperlink**.
2. Select **CSV**.
3. **Select the payments you wish to download** by clicking on the box to the left of the payment date; or clicking all on the page check the top box in that column.



4. Click **Download** under Actions column.

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

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

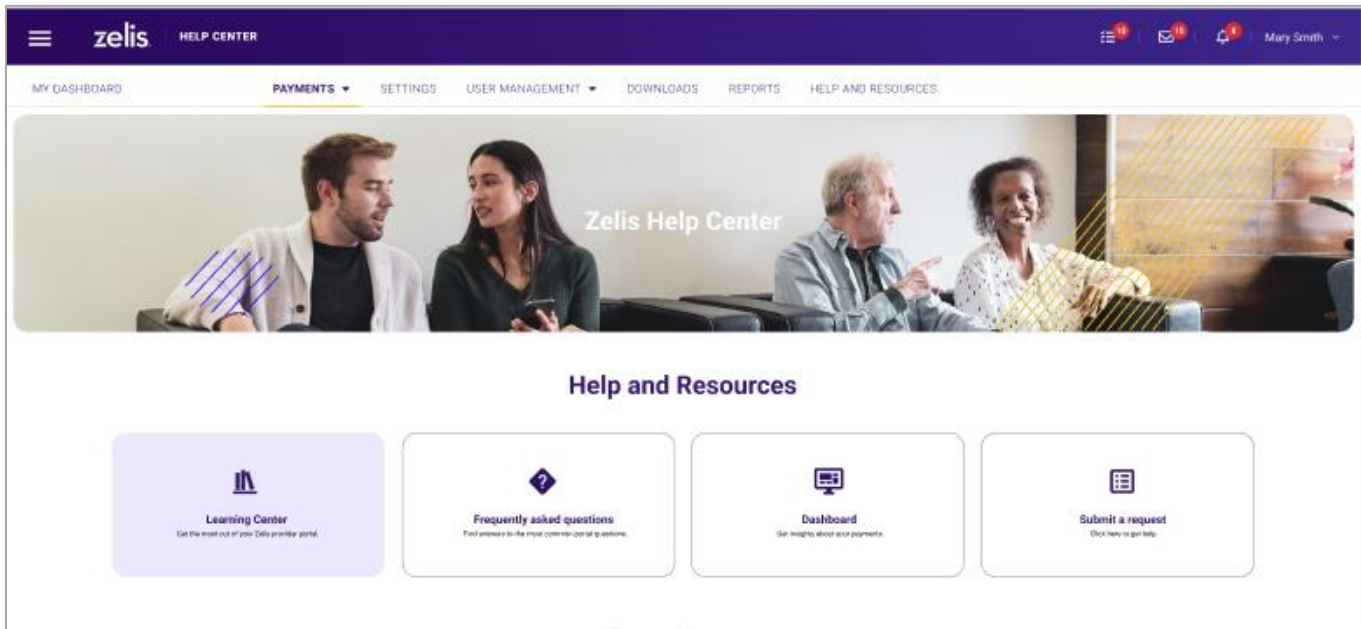


*If you still do not see the payment, un-check the "Show only payments not downloaded", above the search fields.*



# Help & Resources

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

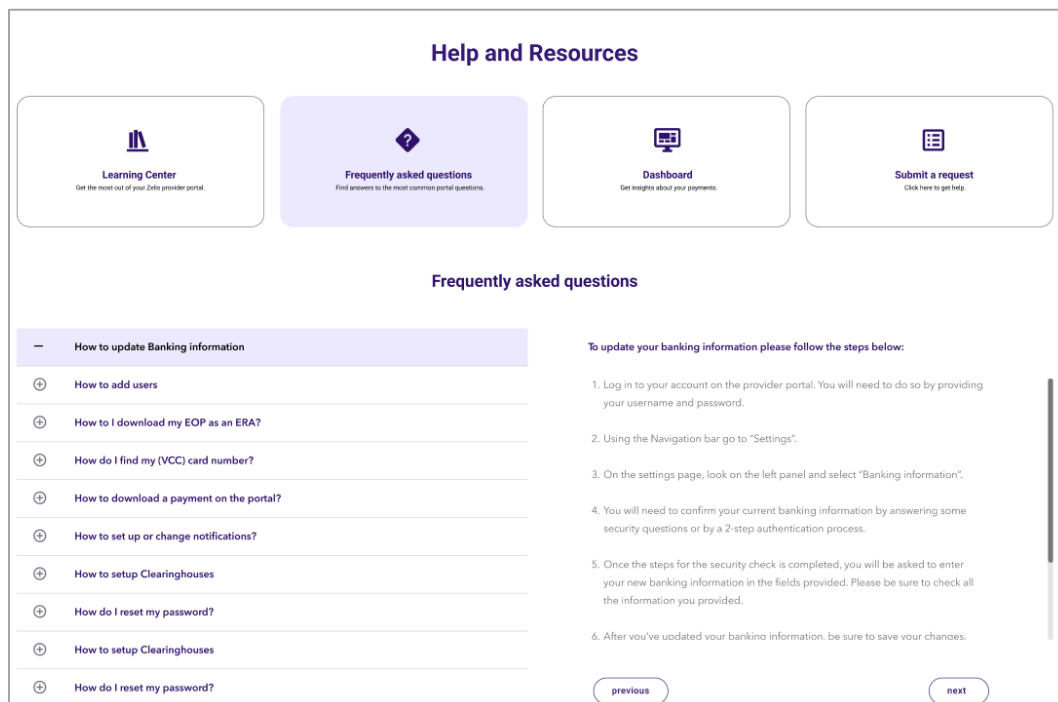


## Learning Center

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

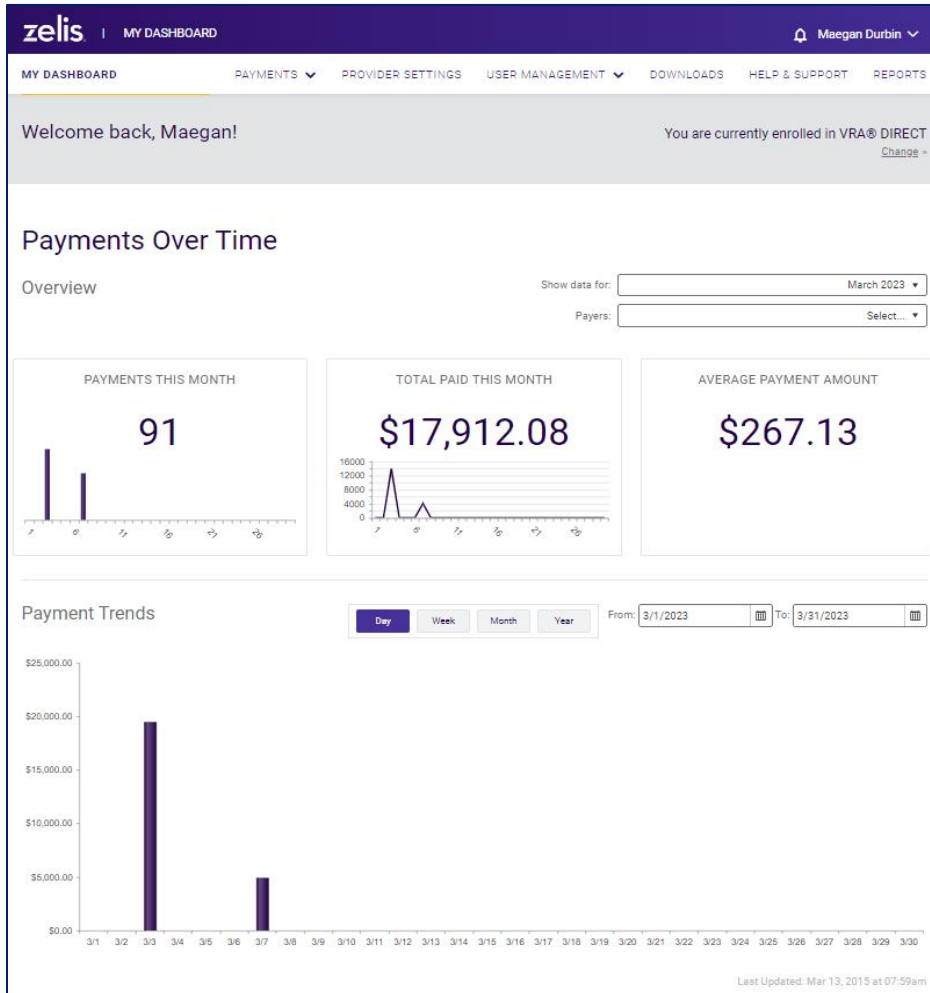
## FAQs

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



# Dashboard

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



## Submit a Request

Visit this page to get help with:

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

**Request form** Reason

\*First name  First Name

\*Last name  Last Name

\*Business name  Enter business name

\*Email address  Enter email address

\*TIN  Enter TIN

Payment ID (Optional)  Enter 1 or more payment ID, separated by a comma

\* Required fields

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

# 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.*

Maegan Durbin  
TIN  
111113335  
NPI  
1212121212

Profile Information

Notification Center

Electronic Documents

My Downloads

### My Profile

#### Your Profile Information

Your Tax Id Number: 111113335      Your NPI: 1212121212

First Name:       Last Name:

Title:

Street 1:

Street 2:

City:       State:

Zip:

Your Phone Number:       Your Fax Number:

Your Email:

#### Reset Your Password

#### Reset Your Security Questions

Security Question 1:       Answer 1:

Security Question 2:       Answer 2:

## 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...	<a href="#">Name: Burlington Labs, LLC Tax ID: 473</a>	Provider Payment Alert
02/17/20...	<a href="#">Name: Burlington Labs, LLC Tax ID: 473</a>	Provider Payment Alert

## My Downloads

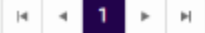
The *My Downloads* section displays the payments you have downloaded (if applicable, based on the products your office subscribes to).

### My Downloads

From Date   To Date   PaymentID  Status

Note: Downloads below will expire 24 hours after they are created.

Date Requested	Payment IDs	Status	Download
09/02/2021	20622295,207123... <a href="#">More</a>	Error	

 1 1 - 1 of 1 items

# **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.

# Portal Troubleshooting Tips

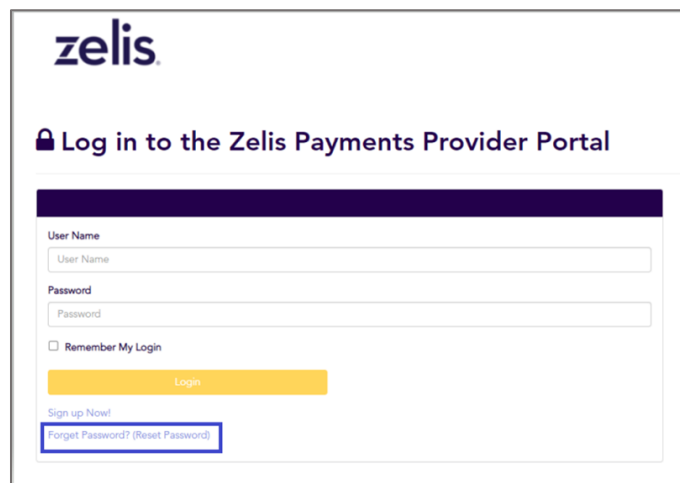
- Make sure you are using the latest version of Google Chrome. Chrome is the best browser to use to access the portal. The portal DOES NOT function on Safari (IOS).
- The portal does not function on mobile devices.
- If using Google Chrome, Firefox, Internet Explorer, or Microsoft Edge, and the portal 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.*



The screenshot shows the login interface for the Zelis Payments Provider Portal. At the top left is the 'zelis' logo. Below it is the heading 'Log in to the Zelis Payments Provider Portal'. The login form includes a 'User Name' field, a 'Password' field, a 'Remember My Login' checkbox, a yellow 'Login' button, and a 'Forgot Password? (Reset Password)' link highlighted with a blue box. There are also links for 'Sign up Now!' and 'Forgot Password? (Reset Password)'.