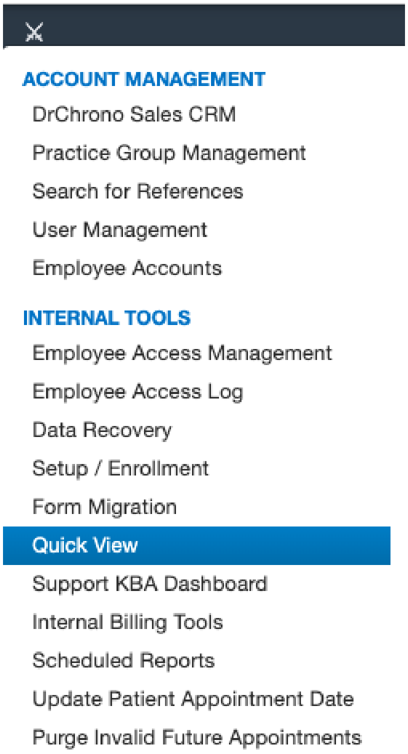
INTERNAL: ePS dashboard for client submission status

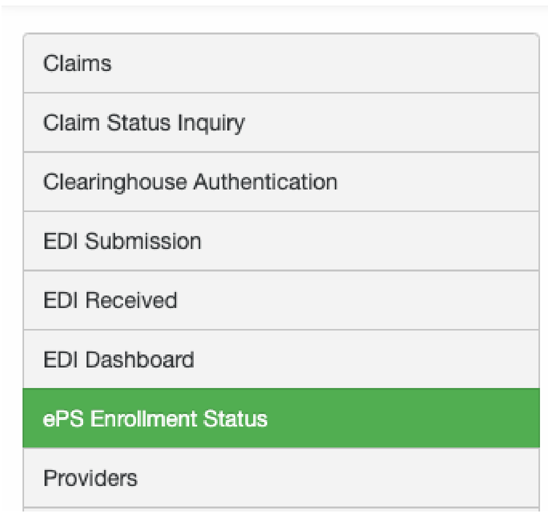
07/24/2024 6:05 pm EDT

To check the status of a client's ePS EDI/ERA submission requests without having to break the glass into their account, a dashboard has been created for internal use.

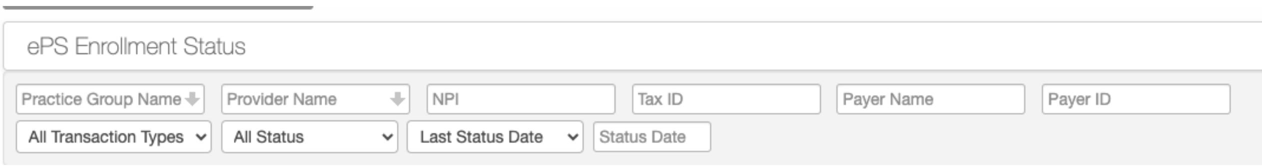
- Navigate to Swords > Quick View



- From the left column, select ePS Enrollment Status



- From here, you can select from various options to search for the client.



- You also have the option to exclude completed enrollment requests, so you will only see the outstanding ones.

- Please note, that only the first 500 records will be displayed on this dashboard. If you are working with a client who has more than 500 enrollment requests, you will need to export the file and work with it in .csv or .xlsx format.