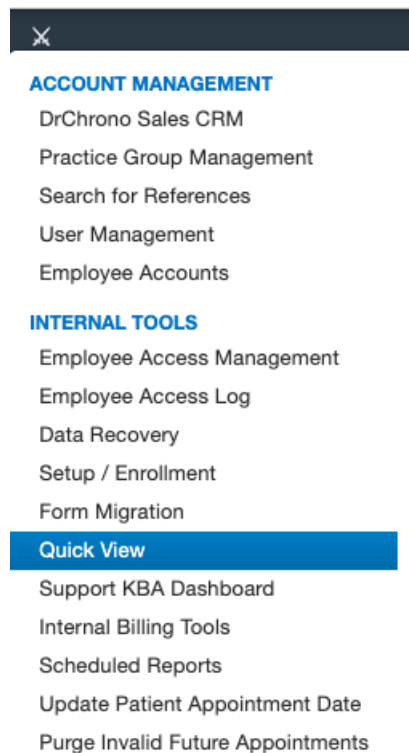


# INTERNAL: ePS dashboard for client submission status

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



A screenshot of a web application menu. At the top is a dark grey bar with a white 'X' icon. Below it are two sections: 'ACCOUNT MANAGEMENT' and 'INTERNAL TOOLS', both in blue text. Under 'ACCOUNT MANAGEMENT' are links for 'DrChrono Sales CRM', 'Practice Group Management', 'Search for References', 'User Management', and 'Employee Accounts'. Under 'INTERNAL TOOLS' are links for 'Employee Access Management', 'Employee Access Log', 'Data Recovery', 'Setup / Enrollment', and 'Form Migration'. Below these is a blue bar with 'Quick View' in white text. Under 'Quick View' are links for 'Support KBA Dashboard', 'Internal Billing Tools', 'Scheduled Reports', 'Update Patient Appointment Date', and 'Purge Invalid Future Appointments'.

- From the left column, select ePS Enrollment Status

Claims
Claim Status Inquiry
Clearinghouse Authentication
EDI Submission
EDI Received
EDI Dashboard
<b>ePS Enrollment Status</b>
Providers

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

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## ePS Enrollment Status

Practice Group Name	Provider Name	NPI	Tax ID	Payer Name	Payer ID
All Transaction Types	All Status	Last Status Date	Status Date		

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

Exclude Completed

- 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.

Note: Only the first 500 records are displayed. Download a .csv file to view all records.

 [Export](#)

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