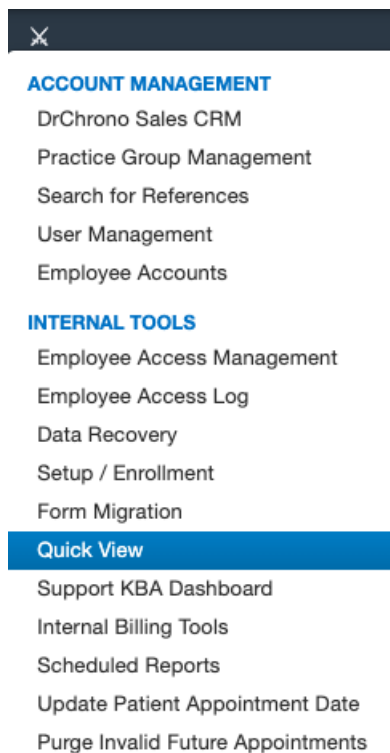


INTERNAL: Checking ePS enrollment status without breaking glass into client's account

07/24/2024 5:40 pm EDT

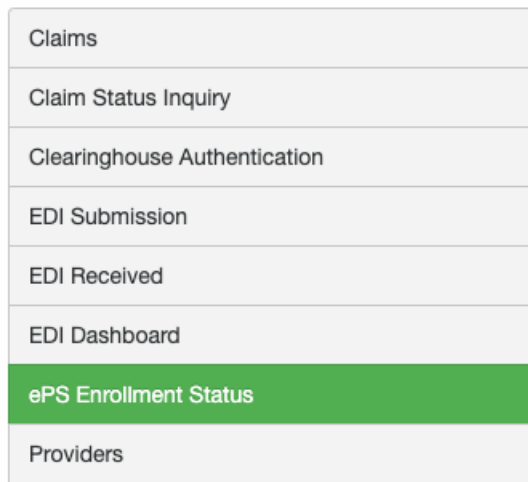
If a client has enrollments pending with ePS, you can check their status without having to break the glass into their account. Here's how:

- Navigate to Swords > Quick View



A screenshot of a web application's navigation 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'. The 'Quick View' link is highlighted with a blue background. Below 'Quick View' are links for 'Support KBA Dashboard', 'Internal Billing Tools', 'Scheduled Reports', 'Update Patient Appointment Date', and 'Purge Invalid Future Appointments'.

- Select ePS Enrollment Status from the menu on the left.



A screenshot of a dropdown menu with a light grey background. The menu items are listed in a table with a thin border. The item 'ePS Enrollment Status' is highlighted with a green background.

Claims
Claim Status Inquiry
Clearinghouse Authentication
EDI Submission
EDI Received
EDI Dashboard
ePS Enrollment Status
Providers

- The top menu gives you several search options.

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

- Once your client is selected, it will populate all of their ePS enrollments

Your activity of quick view is being recorded.

ePS Enrollment Status

Provider Name NPI Tax ID Payer Name Payer ID

All Transaction Types All Status Last Status Date Status Date Exclude Completed [Search](#)

Note: Only the first 500 records are displayed. Download a .csv file to view all records. [Export](#) [Next](#) 1 / 3

Id	Practice Group Id	Practice Group Name	Customer Name	Provider Id	NPI(s)	Tax Id	Payer Id(s)	Payer Name(s)	Transaction	Status	Status Date
217											
218											
219											
220											
247											
248											

- From this screen, you will see the DrChrono Practice Group ID, customer name, NPI, TIN as well as details regarding that particular enrollment.
- The columns on the right will show you payer-specific information.
 - **Payer ID** - payer ID for that particular enrollment
 - **Payer Name** - the name of the payer for that particular enrollment
 - **Transaction** - the type of enrollment (Remittance/Claims/Eligibility)
 - **Status** - the current status of the enrollment
 - **Status Date** - the date of the current status

Payer Id(s)	Payer Name(s)	Transaction	Status	Status Date
95241	A.G.I.A. Inc.	Remittance	No Form Created, ePS Action Required	05/16/2023
93044	A & I Benefit Plan Administrators	Claims	Complete	05/16/2023
31147	1-888-OHIOCOMP (Ohio BWC)	Claims	Complete	05/16/2023
20413	3P Administrators	Remittance	Complete	06/24/2023
16013	DMERC Region A	Remittance	Denied	09/01/2023
16013	DMERC Region A	Claims	Form Returned, ePS Action Required	12/07/2023



