

INTERNAL: ePS Account Management Process

07/24/2024 6:05 pm EDT

Account Management Process

The first step is to send out the initial transition email alert to your customer.

Once you have completed the email set the customer up in the ePs system via the customer's DrChrono account under PG settings.

Subject: PLEASE REVIEW: Migration to New Clearinghouse



Hello {{Customer Name}},

We are excited to announce the integration of our new and enhanced [eProvider Solutions](#) Clearinghouse. [DrChrono](#) and [eProvider Solutions](#) are owned by [EverCommerce - Health Services](#) and are leading companies in the Healthcare industry. By integrating these two companies, we have created a better solution that brings a brighter future for our valued customers. We are continuously looking for ways to improve our services so that we may deliver a world-class service to our customers. As such, we are looking forward to you experiencing our partnership with eProvider Solutions.

We will be reaching out to begin the process of migrating your account over to our eProvider Solutions Clearinghouse. As we begin to migrate your agreements over to our eProvider Solutions Clearinghouse, we will need your assistance during this transition.

What Does This Mean For You?

Change Healthcare/TriZetto will no longer be the primary clearinghouse and eProvider Solutions will be processing claims and ERAs to the payers as soon as your agreements are approved.

What To Expect

- The transition requires current agreements on file to be re-completed for eProvider Solutions Clearinghouse.
- **As you move through the agreements, additional actions may be necessary based on the payer's requirements.** (e.g., *provider signatures, provider registration on portals, etc.*)

Exciting Benefits

- **All-in-one service:** The eProvider Solution and DrChrono software collaboration means no more "being caught in the middle" between software and clearinghouse

- **Sign agreements electronically:** upgrades include being able to sign the agreements electronically within the system cutting down your approval time

During this process you should **NOT** experience any interruptions with your transactions, however, with any endeavor, we know that challenges do arise so our team is here to help and will continue to proactively monitor your account to ensure a successful migration.

Thank you for your dedicated partnership as we maintain our efforts of revolutionizing healthcare and technology!

Adding Dr. Chrono Customer to EPS

1. Log in to Dr. Chrono
2. Search for the provider in the search bar
3. Click PG settings (you will be directed to the practice group)

1.

The screenshot displays the DrChrono CRM interface for a user named Ganesh Babu. The top navigation bar includes 'DrChrono CRM', '+ Add Doctor', '+ Add Practice Group', and a search bar. The main profile area shows a profile picture of Ganesh Babu, a 'Primary Provider' for 'Dream Theater [5 providers]'. Navigation tabs include 'Doctor Settings', 'History', 'PG Settings' (highlighted in yellow), 'PG History', 'Break Glass', and 'Doctor AR Settings'. A 'Shortcuts' section on the right lists actions like 'Create Follow Up', 'File new Zendesk Ticket', and 'Send to Salesforce'. Below the profile, a 'Salesforce Sync Beta' section shows an 'Account ID' and a 'Send to Salesforce' button. The 'Edit Practice Group Info For: Dream Theater' section features a 'Select Practice Group' dropdown, an 'Add Doctor' section with a list of providers (including Ganesh Babu, Peter Andrew, Dr. Donna Carter, etc.) and 'Update Member Info' and 'Create a Member' buttons, and an 'Add Admin' section with a dropdown showing 'Dr. Mark Williams, DrChrono' and an 'Update Admin Info' button.

2. Scroll to the bottom of the page and select a blue button: Enroll to EPS

Practice Group RCM Options

Tier level

Clearinghouse Enrollment

eProvider Solutions
Enrollment

[Enroll to ePS](#)

[Update Group Info](#)

1. Enter the Practice Details

New Enrollment

×

Practice Details

Primary Office	<input type="text" value="Select an Office"/> ⓘ
Practice Name	<input type="text" value="Dream Theater"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="Select"/>
Zip code	<input type="text"/>
Tax ID#	<input type="text"/>
Primary NPI#	<input type="text"/>

[Close](#)

[Submit to ePS](#)

1. Select Submit to EPS once completed
 - a. An API request will be sent to EPS Clearinghouse to create the customer account with the practice group ID number
 - b. EPS will respond with the customer acronym(it does not need to be entered anywhere if for reference purposes)
 - i. This number will be a 10-digit number starting with DRC- ad then following 7 numbers
 - i. Example: DRC0034567

If the account already has the offices created, you can select the office from the drop-down and most of the details should auto-populate. You will want to select the main billing office that the NPI/Tax ID is linked to

1. Once the customer is added the enroll to ePS button will turn **Green** and show **Connected to EPS**

Clearinghouse Enrollment



Key Notes

The NPI, TAX ID, and any other provider information will be added to ePS

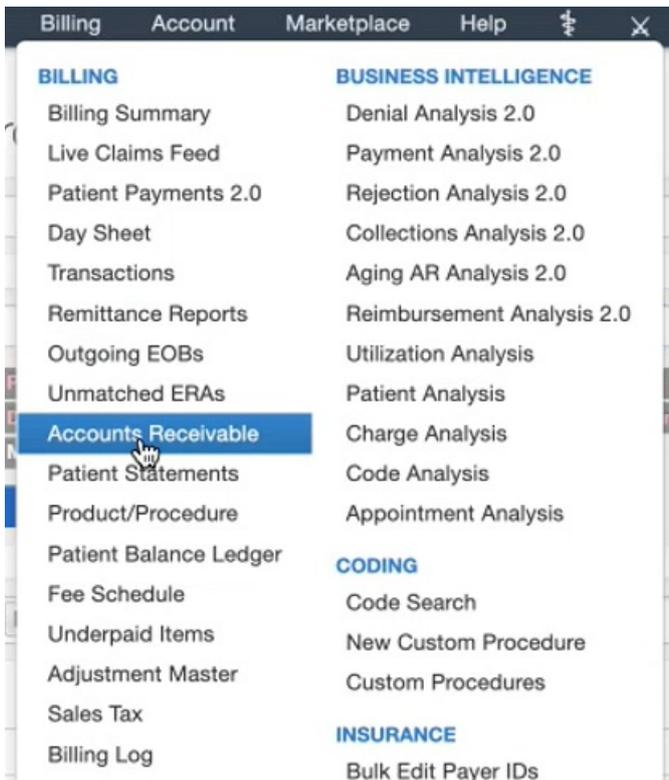
This process is similar to the Trizetto enrollment where a form is usually emailed to the provider prompting them for the practice details.

Creating A JIRA For Customers With Multiple Billing NPI's/Tax ID's

- If the practice bills claim under multiple TAX IDs or NPIs the current process states that a JIRA must be created and assigned to **Ganesh** with all of the details (practice name, address, NPI, Tax ID, taxonomy, etc.)
- A manual API call will be created
- The additional facility details will be added to the EPS account
 - **This will be built into the API and a JIRA will not have to be created once tested and completed**

Account Set-Up Complete: Initiating Enrollments

1. A Zendesk ticket will need to be created for the EDI enrollment team
2. The EDI enrollment team will navigate to Billing → Accounts Receivable



1. The list of payers can be referenced in the provision system to see what needs to be completed.
 - a. Trizetto customers will refer to the same portal.

2. Once all agreements are completed the: Enable eps billing submission can be selected

Once the Zendesk ticket is created and the payer list has been verified (account management + EDI Team), ownership of the process is transferred over to the enrollment team to complete agreements.

Submitting Zendesk Ticket:

Submit ZD ticket to Support EDI Enrollments utilizing macro “ePS Account Manager Enrollment Request”

- Requester: Yourself
- Assignee: Support EDI Enrollments
- Update Practice Name in Subject

EDI Enrollments team will contact client via ticket for agreements (enrollment paperwork)

Final Transfer to ePS Clearinghouse:

Once all EDI enrollments are complete the practice will be switched over to ePs. All providers doctor settings will need to be updated by the EDI team.

NOTE: ERA’s can take additional time to complete depending on the payer. The practice can be switched over to ePs while these get completed. If the practice was on Trizetto, ERA’s will continue to feed back into the system while they get moved from Trizetto to ePs.

Update Doc Settings

- a. Realtime Eligibility Vendor > ePS

b. Checkbox: Enable ePS Billing Submission

Billing

Send statements to onpatient Send patient statements to onpatient when they are generated in the billing center

Enable medical billing

Default billing provider

Is realtime eligibility user User is a paid user who is granted access to this initial limited beta release of realtime eligibility.

Realtime eligibility vendor

Provider commercial number

License number State license number

Social security number

Organization tax id Tax id # of billing organization if it is not the doctor personally.

Organization name Name of organization.

Npi number

Rendering provider npi number

Aka npi number

Medicaid provider number For medicaid provider only.

Enable eps billing submission Enable ePS clearinghouse submission

Update PG Settings > Enroll to ePS

Terminating the Trizetto Site ID

The EDI team will update the Zendesk ticket to let the Account Manager know the entire transition has been completed. This includes the transfer of all EDI/ERA enrollments to ePs. Trizetto's site ID will need to be termed.

The account Manager will fill out the term typeform for the site to be canceled. This step must be only completed once ALL EDI's and ERA's are moved to ePs. [Trizetto Site ID Termination Form](#)

Additional Process Notes

- **Account Verification Before Transitioning to EPS**
 - **NOTE:** Once all claims' enrollments have been approved the EDI team will reach out to the account manager for verification/confirmation of the payer list
 - **NOTE:** Once confirmation is received the account will be transitioned to EPS by the EDI team
- **Who Owns What Step**
 - **NOTE: Account Manager**
 - Reaching out to customers via email to confirm the migration
 - Adding practice to the ePs system through the CRM.
 - Submitting Zendesk ticket to the EDI enrollment team. Utilize the macro: ePs RCM Enrollment Request
 - Submitting termination notice to remove the practices of their Trizetto Site ID
 - **NOTE: EDI Team**
 - Initiating enrollments and providing the customer with all relevant enrollment forms they need to complete
 - Once EDI's are complete updating the doctor settings and moving the providers over to ePs
 - Communicating with practice on enrollment status and updates
 - **NOTE: Support Task Team**

- Updating the bulk edit payer ID list
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