INTERNAL: How to migrate current customer to clearinghouse ePS

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To transition a current customer of DrChrono utilizing TriZetto or Change Healthcare (fka Emdeon) to eProvider Solutions (EC clearinghouse), follow the steps below.

1. **Add Customer to ePS:**

*Choose the Main provider of the practice in the CRM > PG Settings > Enroll to ePS > Fill in the details > Submit to ePS. If the transaction succeeds, the practice details get added to the ePS system, and the blue **"Enroll to ePS"** button will change to green "**Connected to ePS."***

2. **Initiating the EDI Enrollment:**

Please log into the Provision portal and follow the instructions in the attached manual to initiate the enrollment for all the payers that practice submits claims. In the 1st step (Add Customer to ePS), we added only the primary NPI and Tax ID# to the ePS system; if the practice bills the claims under the multiple groups NPI# or provider individual NPI#, then create a JIRA and assign it to me with the below details.

Facility/Provider name

Address Line1

Address Line2

Address City

Address State Code

Address ZipCode

TaxId

Npi

Primary Taxonomy Code

3. **Set ePS as a Clearing House:**

Choose each provider of the practice in the CRM > Doctor Settings > Check "Enable ePS submission" and hit "Update Doctor Info."

4. **Update ePS Payer in the patient demo:**

Once you enable ePS as a clearing house in the doctor's account, all the screens where we can search or select the insurance payers will show the payers from the ePS payer list.

Go to Billing > Bulk Edit Payer ID# screen, where our system shows the list of insurances in the Patient Demographics screen. We need to choose the ePS Payer ID# for the payers that have a different payer ID# in the ePs system. Please use the below Kbase article for reference.

https://support.drchrono.com/hc/en-us/articles/11782905228827?

When a client is enrolled with ePS, each time they enter an ePS payer ID number, a box will appear just to the right to allow them to see what services (EDI/ERA/EFT) are available with that payer and if those services need a separate enrollment.

P.S. - *Bulk Edit Payer ID# may not show the accurate insurance count for the practice; we need to create a JIRA with the practice details to run a script and activate that option. However, it's not a blocker. We should still be able to update the existing payer with the ePS Payer in bulk with the help of the Bulk Edit Payer ID screen.*