



Provider Payments Portal

QUICK REFERENCE GUIDE



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Provider Payments Login

Refer to the screenshot shown in Figure 1.

- a. If you have already registered (*have an account*) on the Provider Payments Portal, enter your username and password and click the **“Log In”** button. The **“Inquiry”** page (*Figure 6*) will open. For more information, go to the **“Inquiry Page”** section of this document. If you have already registered but are having difficulty accessing your account, click the link, **“Can’t access your account?”** and follow the instructions.
- b. If you wish to confirm your ACH deposit (*ping*), click on the link, **“Confirm your ACH Deposit (Ping) by clicking here.”** After ping verification, you will be able to set up an account to access the Provider Payments Portal.
- c. If you are a First-time User, click on the **“Create New Account”** button and follow the instructions to set up your online access. Please make sure you add **echohealthinc.com** as an approved email domain in your system to ensure you receive all account notifications.

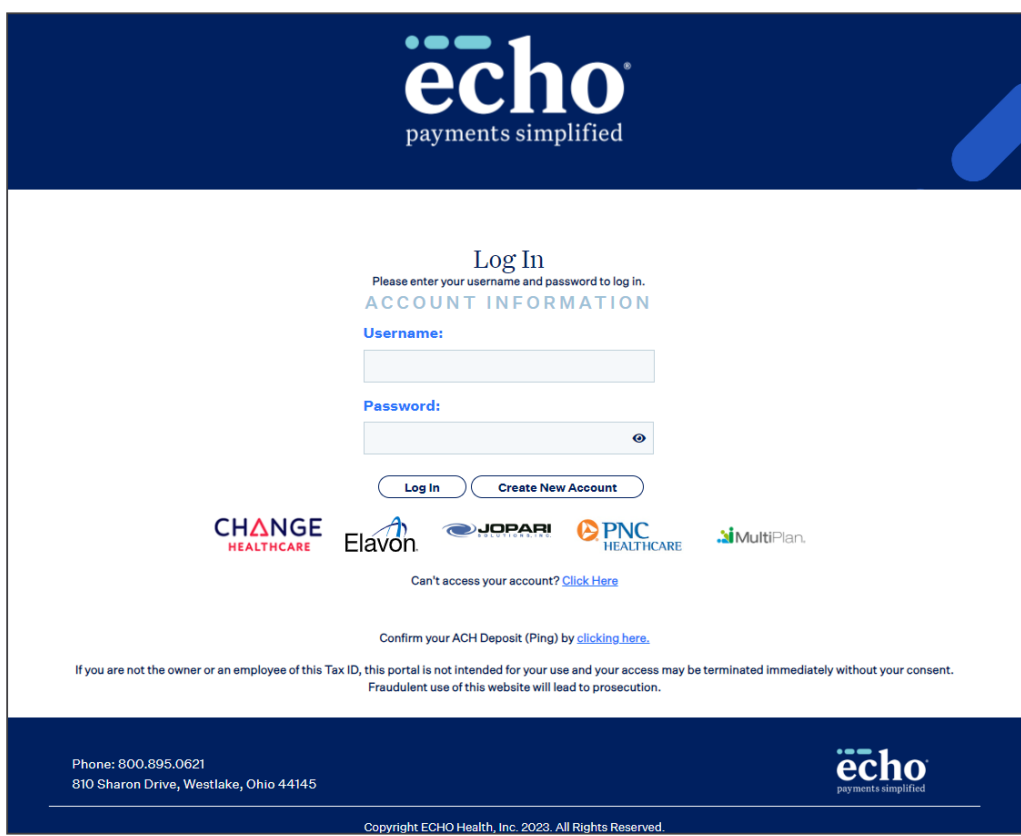


Figure 1

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Verifying Ping

Terms & Conditions (Figure 2).

- a. If you select the link to verify your ping, you are first directed to a page where you must accept Terms & Conditions (Figure 2) by checking the box and clicking on the “Accept” button to continue.

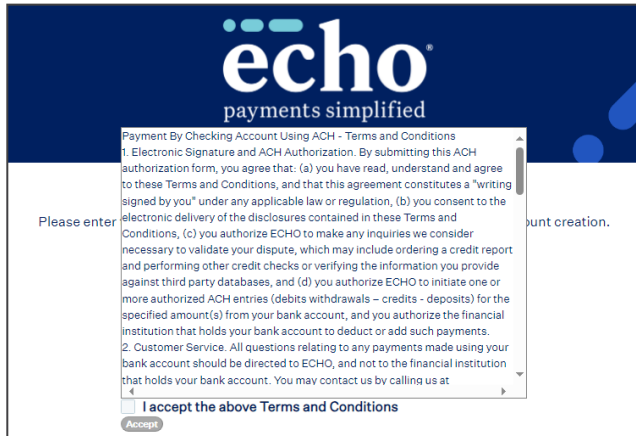


Figure 2

Confirmation of account (Figure 3).

- b. After clicking on “Accept,” you are directed to the ping verification page (Figure 3) to enter your TIN (Tax ID) and Deposited Amount (ping).

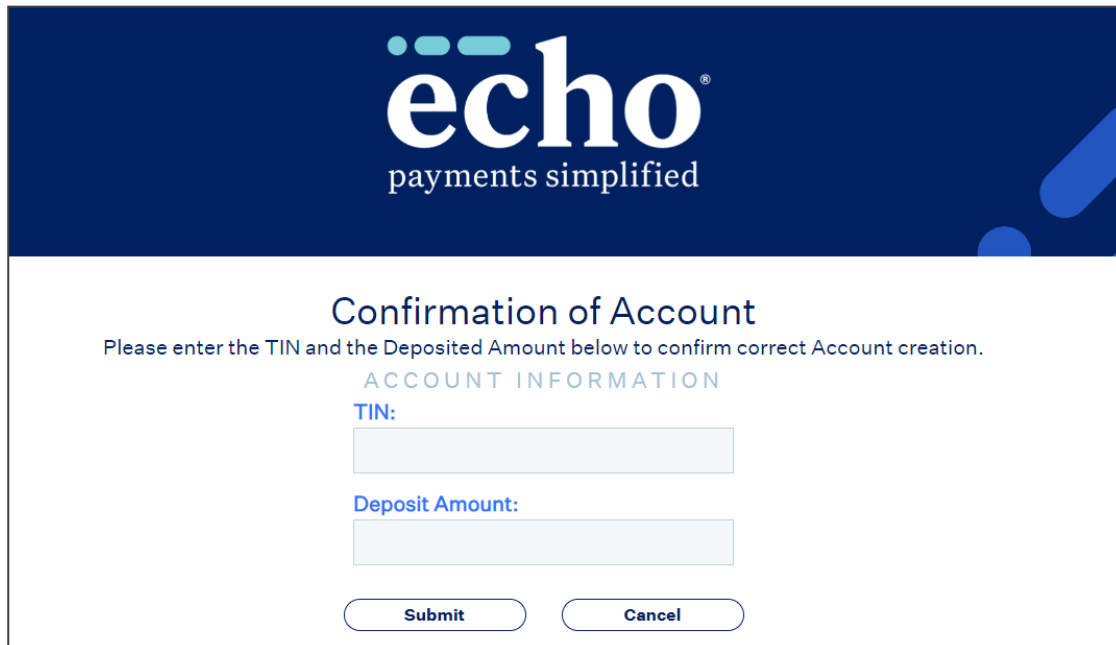


Figure 3

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Verifying Ping (continued)

- c. When you have submitted a valid TIN and Deposit Amount, the “Confirmation of Account” screen (Figure 4) is displayed.

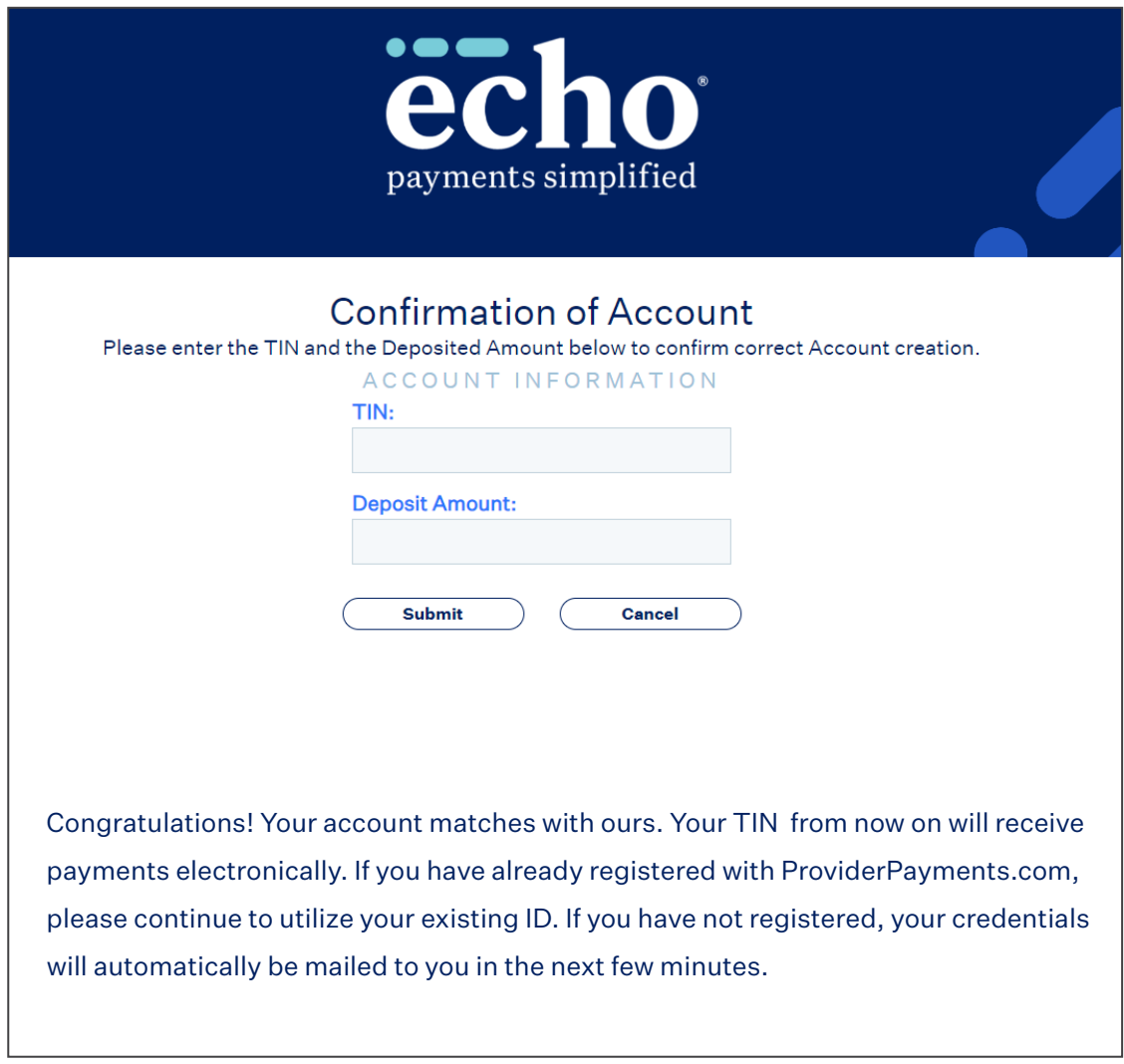


Figure 4

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First-time Users – Register/Create a New Account Page

First-time users will need to register. Once you have successfully registered, you will be able to log in on the main page.

- To register, click on the “**Create New Account**” button shown in Figure 1. Unless otherwise indicated, all information is **required**.
- Clicking this button opens the screen shown in Figure 5. When filling in the form, be sure to follow the instructions appearing to the right of the fill-in boxes.

echo
payments simplified

Create a New Account

ACCOUNT INFORMATION

Username:

Choose a username that is at least four (4) characters long; you may use numbers and/or letters.

First Name:

Last Name:

Phone Number:

Email:

An email address is needed so that your password can be emailed to you if you ever forget it.

Password:

Confirm Password:

- › Password must be at least 16 characters.
- › Password must have at least one upper-case letter.
- › Password must have at least one lower-case letter.
- › Password must have at least one numeric character.
- › Password must have at least one special character (such as !, @, #, \$, %, ^, &). Note: Cannot use asterisk (*).
- › Password cannot contain more than 3 consecutive characters from your username.
- › Passwords expire every 120 days.

Figure 5

Figure 5 continued next page

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First-time Users – Register/Create a New Account Page (continued)

Figure 5 continued from previous page

Select your **Affiliation with Tax ID** and fill out all required fields based on your selection.

Affiliation with Tax ID:

Other

- Select
- Clearinghouse
- Billing Company
- TIN Employee
- TIN Owner
- Other**

TIN Contact Email:

TIN Contact Phone Number:

Tax Identification Number (TIN):

Your 9-digit Tax Identification Number (TIN) should be entered without any spaces or dashes (-).

Draft Number Verification I do not have a Draft Number

Draft Number:

ECHO draft numbers contain no space or special characters and can be located on any past Explanation of payment.

Draft Amount:

The Draft Amount should be entered without a dollar sign (\$).

Register **Cancel**

Need additional help? [Click here](#)

OR

Tax Identification Number (TIN)

Your 9-digit Tax Identification Number (TIN) should be entered without any spaces or dashes (-).

Draft Number Verification I do not have a Draft Number

Payor Check No

Your Payor check number should be entered without any spaces.

Patient Account No

Your Patient Account Number should be entered without any spaces.

Register **Cancel**

Need additional help? [Click here](#)

Fill in all data boxes or choose your selection from the dropdown shown. When done, click the **“Register”** button to complete your registration. If you do not wish to complete your registration, click on the **“Cancel”** button. Once you have completed your registration, a confirmation email will be sent to you. You must verify your account via the confirmation email in order to activate your account.

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Inquiry Page

When you have logged in, you will see the “Inquiry” page that lists the most recent payment documents delivered via ECHO® (see Figure 6). You can also page back, allowing you to review up to the 48 most recent documents.

Additional capabilities include the following:

- 1 Produce a printable PDF copy of the remittance by clicking the “EPP” link.
- 2 Select the “835” link to view the associated 835 file.
- 3 View the settlement status (including an image of the cleared check for payments issued on paper) via links in the “Settlement” column.
- 4 Click on the arrow icon (▶) to expand the document to show claim details.

Production Date of Document	Document ID	Payor	Payment Amount	Image of Document	3 Settlement
11-22-2023			\$ 37.57	1 EPP 835 2	2023-11-22
09-20-2023			\$ 690.54	EPP 835	2023-09-20
07-28-2023			\$ 115.10	EPP 835	2023-07-28
05-24-2023			\$ 8.37	EPP 835	2023-05-24
04-26-2023			\$ 16.65	EPP 835	2023-04-26
02-15-2023			\$ 35.72	EPP 835	2023-02-15
08-17-2022			\$ 25.45	EPP 835	2022-08-17
03-30-2022		Treatment Health Benefits	\$ 816.64	EPP	2022-04-05
01-31-2022		Treatment Health Benefits	\$ 53.70	EPP	2022-02-15
12-29-2021		Treatment Health Benefits	\$ 200.01	EPP	Not Cleared
12-22-2021		Treatment Health Benefits	\$ 32.45	EPP	2022-02-02

Figure 6

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Advanced Search Page

Choose the “Advanced Search” option in the menu bar near the top of the “Inquiry” page (Figure 6). The screen shown in Figure 7 below appears.

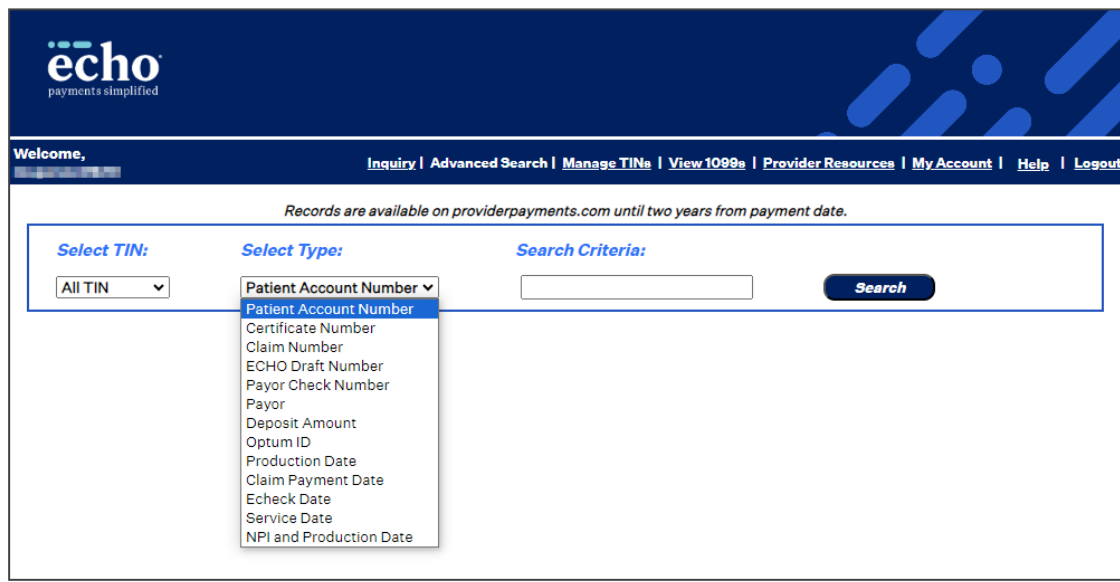


Figure 7

A dropdown menu in the “Advanced Search” allows the user to select the search criteria:

- **Patient Account Number**
- **Certificate Number** (*patient’s insurance card number or SSN*)
- **Claim Number**
- **ECHO Draft Number** (*either the check number or the EFT number*)
- **Payor Check Number** (*check number assigned by TPA’s adjudication system*)
- **Payor**
- **Deposit Amount** (*total amount of the bulk check or electronic funds transfer*)
- **Optum ID** (*for payments sent by Optum*)
- **Production Date**
- **Claim Payment Date**
- **Echeck Date**
- **Service Date**
- **NPI and Production Date**

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Manage TINs: Users Posting Payments Issued to Multiple Tax ID Numbers

Update your username / password to enable access to multiple Tax ID Numbers by clicking the **“Inquiry”** link (*top menu bar*) and the **“Add New TIN”** tab shown in Figure 8.

Choose the **“I have a Payment”** radio button. Select an **“Affiliation with Tax ID”** from the dropdown. Enter the 9-digit **TIN** (*Tax Identification Number*) you wish to add; it must be entered without any spaces or hyphens (-). Enter the **ECHO Draft Number** and **Draft Amount** for a payment that was issued to the **TIN** you registered. Click the **“Add”** button.

The screenshot shows the ECHO portal interface. At the top, there is a navigation bar with the ECHO logo and the tagline 'payments simplified'. Below the navigation bar, there is a 'Welcome,' message and a series of links: Inquiry | Advanced Search | Manage TINs | View 1099s | Provider Resources | My Account | Help | Logout. The main content area is titled 'Add New TIN' and 'Remove Existing TIN'. Below this, there is a form titled 'Use the form below to add a new TIN to your account.' The form has a section for 'Account Information' with two radio buttons: 'I have a Payment' (selected) and 'I have No Payment'. Below the radio buttons, there is a dropdown menu for 'Affiliation with Tax ID:' with a 'Select' button. Below the dropdown, there are three input fields: 'TIN:', 'Draft Number:', and 'Draft Amount:'. At the bottom of the form, there are two buttons: 'Add' and 'Cancel'. At the very bottom of the page, there is a footer with contact information: ECHO Health Inc. • 810 Sharon Drive • Westlake, Ohio USA 44145 • Phone: 800.895.0621 • Fax: 440.835.5656 © 2005 - 2013 Copyright ECHO Health, Inc. All Rights Reserved.

Figure 8

If you do not have a draft available, click the **“I have No Payment”** radio button shown in Figure 8. The screen shown below (*Figure 8A*) opens. Set up the new **TIN** by entering a 9-digit number (*no spaces or hyphens*) and the **“Patient Account Number.”** Click the **“Add”** button to complete.

The screenshot shows the ECHO portal interface, similar to Figure 8. The navigation bar and 'Welcome,' message are the same. The main content area is titled 'Add New TIN' and 'Remove Existing TIN'. Below this, there is a form titled 'Use the form below to add a new TIN to your account.' The form has a section for 'Account Information' with two radio buttons: 'I have a Payment' and 'I have No Payment' (selected). Below the radio buttons, there is a dropdown menu for 'Affiliation with Tax ID:' with a 'Select' button. Below the dropdown, there are three input fields: 'TIN:', 'Payor Check No.:', and 'Patient Account Number:'. At the bottom of the form, there are two buttons: 'Add' and 'Cancel'. At the very bottom of the page, there is a footer with contact information: ECHO Health Inc. • 810 Sharon Drive • Westlake, Ohio USA 44145 • Phone: 800.895.0621 • Fax: 440.835.5656 © 2005 - 2013 Copyright ECHO Health, Inc. All Rights Reserved.

Figure 9

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Remove Existing TINs From Your Account

Remove an existing TIN that is no longer needed from your account by toggling to or clicking on the “Remove TIN” tab. Search for the TIN you wish to remove and select it. Click “Remove” to proceed or “Cancel” to cancel the request for the change. These TINs can be added back to your account using the “Add New TIN” tab, if needed.

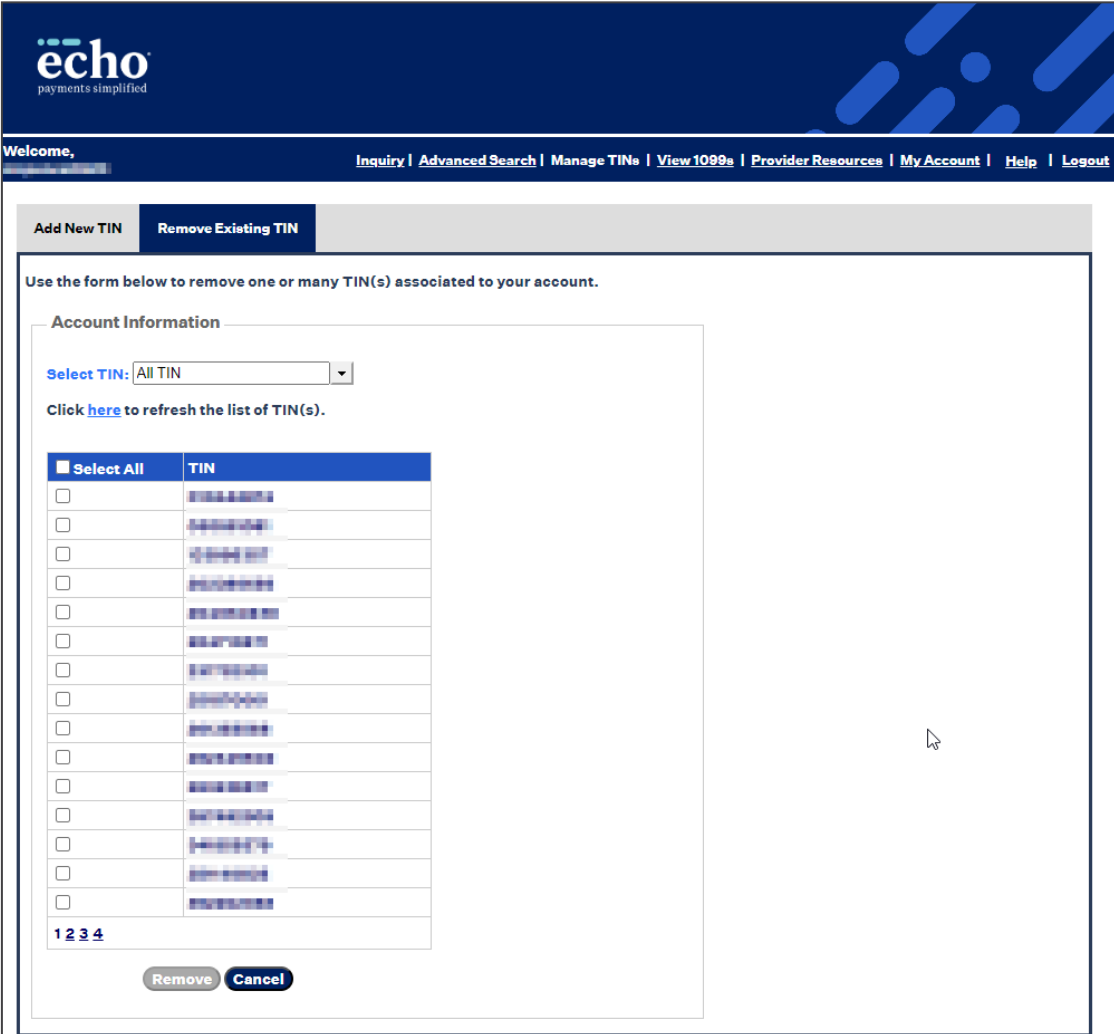


Figure 10

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View 1099s

From the top menu bar on the “Inquiry” page (Figure 6), select the “View 1099s” link to see your 1099s by TIN (Figure 11). Click on the “View” link (in the “Link to 1099” column) to see the 1099. Be sure to disable pop-up blockers in your browser to allow this feature.



Figure 11

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My Account

To update your password, account contact information and email preferences, select the “My Account” link from the top menu bar of the “Inquiry” page (Figure 6). The screen shown in Figure 12 will appear to allow changes. When finished, click the “Update” button.

The screenshot shows the 'My Account' page with the following fields and options:

- User Name:** [Text input field]
- Email:** [Text input field]
- Phone Number:** [Text input field]
- Fax Number:** [Text input field]
- Contact First Name:** [Text input field]
- Contact Last Name:** [Text input field]
- Preferred Contact Method:** Email Phone
- Preferred Notification Selection:**
- Electronic 1099 Acceptance:** Yes No
- Disable Email Notices:** Yes No
- Consolidated Email:** Yes No
- Virtual Card Notices:** Yes No
- 835 Distribution Notices:** Yes No
- ACH Payment Notices:** Yes No
- Paper Check Notices:** Yes No
- Change Password

Buttons: **Update** **Cancel**

Figure 12

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