PAYSPAN FAQ

Do I Have to Use the Electronic Mailbox?

The electronic mailbox feature is available as an option for having remittance files transmitted automatically, or you can retrieve your remittances from PaySpan Health manually.

How do I activate an Electronic Mailbox?

The Edit Electronic Mailbox page is used to set up an electronic mailbox FTP file delivery. One PaySpan Health (My PSH) electronic mailbox can be set up for each receiving account.

It only takes a few moments to activate and includes several custom options:

1. From the Home page, select the Edit Mailbox button next to the receiving account for which you want to activate an electronic mailbox
2. Select the Active radio button
3. Check the 835 Packaging option if you would like to send a copy of your 835 files to the electronic mailbox. If you select 835 Packaging, you have a few additional choices to make:
    1. Enveloping format: select PaySpan Health standard the TIN enveloping option.
    2. Version option: review the 835 version (4010A1 or 5010A1) options previously selected, or change the version to be delivered
    3. Routing options: choose where you would like to route your 835 files from the list of Data Exchange Partners. By Selecting PaySpan Health, your files will be routed to your My PSH mailbox and files will be available to view online. Please ensure the appropriate agreements are in place for your Data Exchange Partner before selecting them.
    4. Route to multiple locations: select this option if you would like to route files to multiple locations based on Payer.
4. Check the Add a Payer identifier to the filename option if you would like to include a Payer identifier in the filename used when delivering the file to the electronic mailbox.
5. Check the Package PDF option if you would like to send PDF files to your My PSH mailbox. PDF files cannot be routed to Data Exchange Partners at this time.
6. Filename formats displayed will be those used for your electronic mailbox files based on your selections. Both 4010 and 5010 formats are displayed, but only the version selected on the version option link will be delivered to your mailbox.

7. Check the Confirm New Payments option if you would like new payments to be confirmed when the file is delivered to the mailbox.
8. The Electronic Mailbox Summary page will be displayed when an electronic mailbox is activated. Print the page for your records.

After you activate a mailbox, the PaySpan Health Electronic Mailbox Details section will be populated with information needed to access the data.

1. You will see the FTP User ID displayed in the box, however, the initial password is only displayed when the electronic mailbox is activated. The password can be reset at any time using the Generate New Password button. When the New Password button is selected, the new password is displayed in a pop up window.
2. There is one FTP User ID per electronic mailbox. Select OK to create the initial password. The password will not be saved on PaySpan Health, so be sure to store the password securely before closing the window. Using an SFTP client, the FTP User can access the Electronic Mailbox address; enter the FTP User ID and password to access its contents. This application is ideal for automating file retrieval.
3. Password maintenance, including changing the password, should be performed by the User on the FTP site. If the FTP User requires a password reset, the Provider will select the Generate New Password button and deliver the password to the FTP User. Again, the User can change the password on the FTP site.

How do I Add Another Receiving Account?

If you want to separate your payments into two or more receiving accounts, follow these steps:

1. Go to Payments
2. Go to Account Management
3. Click on the 'New Account' button and fill all the information out
4. Click 'Next'
5. Click 'Confirm'

After you have created the new receiving account successfully there are a few additional steps, you must assign a registration code to that new account. If these steps aren't completed payments will be not be sent to the new account. Follow these steps:

1. Go to Payments
2. Go to Payer Management

3. Click on the + to the left of the Payer (Insurance Co) name to expand
4. Click on 'edit' to the right of the Provider name

In the 'Assign to Receiving Account' section choose the account that you want your payments to go to

Click 'Save'

Any other users on the account will need access to the new account. Follow these steps to grant access to the new account:

1. Go to Administration
2. Select User Administration
3. Select the User Name you want to change
4. Under Accounts, check the box next to the new account. Cross-Account Reporting will also need to be checked if it is not already
5. Click 'Save'
6. Repeat steps 3-5 for each of the other users that need access

How do I change my bank account information?

If you need to make any changes to your bank information a new receiving account will have to be set up. Once you are logged into your account; follow these steps:

1. Go to Payments
2. Go to Account Management
3. Click on the 'New Account' button and fill all the information out
4. Click 'Next'
5. Click 'Confirm'

After you have created the new receiving account successfully there are a few additional steps, you must assign your registration code to that new account. If these steps aren't completed payments will be not be sent to the new account. Follow these steps:

1. Go to Payments
2. Go to Payer Management
3. Click on the + to the left of the Payer (Insurance Co) name to expand
4. Click on 'edit' to the right of the Provider name
5. In the 'Assign to Receiving Account' section choose the account that you want your payments to go to
6. Click 'Save'

Once you have assigned all of your registration codes to the new receiving account, you may deactivate your old receiving account. To do this, follow these steps:

1. Go to Payments
2. Go to Account Management
3. Select the edit link next to the account you wish to deactivate
4. Select the deactivate button on the Edit Receiving Account screen

As long as no registration codes are assigned to the receiving account, your account will deactivate. You can reactivate an account at any time.

Any other users on the account will need access to the new account. Follow these steps to grant access to the new account:

1. Go to Administration
2. Select User Administration
3. Select the User Name you want to change
4. Under Accounts, check the box next to the new account. Cross-Account Reporting will also need to be checked if it is not already
5. Click 'Save'
6. Repeat steps 3-5 for each of the other users that need access

How do I change my email address for Payment notification?

If you would like to change the email address where you receive your payment notification, please follow the steps below:

1. Log into your PaySpan® Health account.
2. Click on Preferences, then Edit Profile.
3. Change the Email Address listed.
4. Click Save.

These steps will only change the email address to which your payment notifications are sent; it will not change your username.

How do I change my password?

If you need to change your password please follow the steps below:

1. Select Preferences

2. Select Change Password
3. Enter your old password
4. Create a new password: the password must be at least 8 characters long and must include lowercase letters, uppercase letters and numbers.

How do I confirm new payments?

You may move new payments from your Home Screen by following these steps.

1. Click on the New Payments Link on your Home Page
2. Select the check boxes next to the payments you wish to confirm
3. Select the Next button.
4. Select Confirm or Confirm and Download.
    1. Confirming the payments simply removes them from your Home Screen.
    2. Confirming and downloading payments removes them from the Home Screen and generates an 835 file to use for auto-posting.

Data is typically stored on PaySpan® Health for 18 months from the date of processing.

How do I download an 835 file?

From the Home page,

1. Click on the link that states the number of payments and the amount
2. Click on the white box to the right of the payment
3. Click 'Next' at the bottom of the page
4. Click 'confirm and download' and your 835 will download. It may take a few moments and all popup blockers must be disabled.

If there are no payments here it is because someone has already viewed them and they have been moved into the document archive.

1. Click on ‘Reports’
2. Click on ‘Document Archive Search’
3. Click on 'Search'
4. Click the checkbox to the right of the payment
5. Select either 4010 835 Download or 5010 835 Download at the bottom of the screen. (Note: Hold Ctrl Key while clicking either option)

WinZip

1. Click on the link that states the number of payments and the amount
2. Click on the white box to the right of the payment
3. Click 'Next' at the bottom of the page
4. Click 'confirm and download' It may take a few moments and all popup blockers must be disabled.
5. Select 'Open.' Your file should then open in WinZip
6. Select the 835 file name(s)
7. Click 'Extract'
8. Select the location you would like your file saved to
9. Click 'Extract' again
10. After the file is extracted - Right Click on the file name
11. Select 'Rename'
12. Add to the end of the file name: .835.edi
13. Press Enter

How do I disable pop up blockers?

Follow the steps below to turn off pop-up blockers:

1. Click Tools
2. Click Pop-up Blocker
3. Click Turn Off Pop-up Blocker

If you do not wish to disable your pop-up blocker, your pop-up blocker will require you to approve the download of the 835 file after you click download. If a pop-up blocker prohibits you from downloading an 835 file, follow the steps below:

1. Click on the yellow bar above the PaySpan® Health Logo at the top of the screen that reads: To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options.
2. Click Download File. . .
3. Click Save
4. Select the folder you wish to save the file to
5. Click Save
6. Click Close

How do I print my remittance advice?

To print your remittance advice you will:

From the home page:

1. Click on the link that states the number of payments and the amount.
2. Click on 'view' next to the payment and your EOB will load; it may take a few moments.
3. Right click on your mouse and select print.

If there are no payments they have been moved into the document archive.

1. Click on 'Reports'
2. Click on 'Document Archive Search'
3. Click 'Search'.
4. Click on 'view' next to the payment and your EOB will load; it may take a few moments.
5. Right click on your mouse and select print

How do I reactivate my account?

If you are interested in re-activating your PaySpan Health account, please follow the steps below in order to activate the account:

1. Login to PaySpan Health by going to 'secure login' at www.payspanhealth.com
2. Go to Payments
3. Go to Account Management
4. Click on the 'Show Inactive Accounts' option located at the bottom right of the page
5. Click 'edit' to the right of the receiving account
6. Click 'Activate' in the Account Status box

After you activate the account there are a few additional steps, you must activate the payers. Follow these steps:

1. Go to Payments
2. Go to Payer Management
3. Click on the 'Show Inactive Payers' option located at the bottom right of the page
4. Click on the + to the left of the Payer (Insurance Co) name to expand
5. Click on 'edit' to the right of the Provider name

6. Select the receiving account listed
7. Click Save

How do I change email address and Add Users?

If you would like to change the email address where you receive your payment notification, please follow the steps below:

1. Log into your PaySpan® Health account.
2. Click on Preferences, then Edit Profile.
3. Change the Email Address listed.
4. Click Save.

These steps will only change the email address to which your payment notifications are sent; it will not change your username.

The username can be 'changed' by adding a new user to the PaySpan® Health account. Users can be added by the administrator on their PaySpan® Health account.

Follow these steps to add users:

1. Go to the Administration Menu
2. Select User Administration
3. Select the Add User button
4. Enter a User Name (this can be an email address, but does not have to be)
5. Enter the users Full Name, phone number and email address
6. Grant access to the appropriate receiving accounts, and features by checking the boxes located on the right hand side of the screen
7. Click Save

An email will be sent to the new user so that they can create a password to log in.

How do I create a New Administrator?

To add a new administrator, follow these steps:

1. Go to the Administration Menu
2. Select User Administration

3. Select the Add User button
4. Enter a User Name (this can be an email address, but does not have to be)
5. Enter the users Full Name, phone number and email address
6. Grant access to the appropriate receiving accounts, and features by checking the boxes located on the left hand side of the screen
7. Click Save

An email will be sent to the new user so that they can create a password to log in.

To deactivate the old administrator account, follow these steps once you log in as the new administrator:

1. Go to the Administration Menu
2. Select User Administration
3. Below the Add User button, select the box next to Show Inactive Users
4. Select the user's full name
5. On the right side of the screen, under User Activation, unselect the box next to Active
6. Click Save

How can I tell if my payment was Check or ACH?
The Payment Type for each payment is listed on the Document Archive search by Payments results screen. Follow these steps to access payment information:

1. Go to the Reports menu
2. Select Document Archive
3. Search by Payment
4. Enter additional search criteria you have to identify the payment
5. Select the Search button
6. Payment Type column will appear on the results page
7. Check and ACH payment types are included in the Payment Type field

How do I access information for old payments?

Payment details for old payments are available in the Document Archive section of PaySpan Health. Follow these steps to access old payment information:

1. Go to the Reports menu
2. Select Document Archive

3. Search by Payment
4. Enter additional search criteria for the payment you are seeking
5. Select the Search button

Why didn't I receive my payment notification?

There are two reasons you may not have received a new payment notification.

1. We may not have the correct email address on file for you. Please confirm the email address listed on your user profile is correct.
2. You may not have authorization to receive new payment emails. Please contact your administrator and ask them to select the New Payment Notification feature on your profile.

How do I add additional Payers to my account?

Contact your Payer and ask them to provide a PaySpan Health registration code. If your Payer participates with PaySpan Health, they will provide a registration code that enables you to register and receive payments via PaySpan Health.