

How to use 835 ERA Capabilities

To access the ERA Enrollment Form, navigate to the **Manage Payments** page in the portal, which can be accessed from the menu on the right hand side of your screen. Make sure to check our guide on setting up your ACH payments first. Double click on your bank account that has an ERA status of **not enrolled**. You will then see a status page with a button that allows you to enroll in ERA.

Reminder - You must complete ACH enrollment before beginning this process.

Manage payments

Bank accounts

- Add bank account
- TEST (Pending) - Checking ending in 2185 - Not linked to any enrollments
- James Hong's bank (Pending) - Checking ending in 4100 - Linked to 0 enrollments
- Anthony Test (Pending) - Checking ending in 0010 - Not linked to any enrollments
- Mulberry Management Cor... (Pending) - Checking ending in 1017 - Linked to 0 enrollments
- Test (Pending) - Checking ending in 0100 - Not linked to any enrollments

Payment settings [New ACH enrollment](#)

Enrollment	Bank account	Linked identifier#	ERA status
New York Test Org TIN: 33-423653	James Hong's bank Checking ending in 4100	1TN	Pending
New York Test Org TIN: 33-423653	James Hong's bank Checking ending in 4100	1TN	Under review
New York Test Org TIN: 33-423653	James Hong's bank Checking ending in 4100	1TN	Not enrolled
New York Test Org TIN: 33-423653	Mulberry Management Corporation Checking ending in 1017	1TN	Enrolled

Payment settings for
Perry Ulysses Cox, MD.

NPI: 0856473857
TIN: 35-9108421
Linked (NPI): 0856473857

ACH enrollment information [What's ACH?](#)

Bank account
TD Bank
Savings ending in 0410

Provider contact
Ted Buckland
Phone: (482) 390-3910 ext. 29
ted.buckland@sacredheart.com
Fax: (482) 201-3948

[Edit ACH enrollment](#)

ERA enrollment information [What's ERA?](#)

Clearinghouse
Availity **Enrolled**
Currently receiving EDI 835 files via ERA.

Provider contact
Ted Buckland
Phone: (482) 390-3910 ext. 29
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Fax: (482) 201-3948

[Edit ERA enrollment](#)

Step 1 Provider Contact Info

The form will be pre-populated with provider name, TIN, EIN, and NPI from the ACH enrollment form. Update the **Provider Contact Information** section with the appropriate information.

The screenshot shows a web interface for managing providers. At the top, there is a navigation bar with 'provider' on the left and 'Authorizations' (with a 'New' button), 'Payments', and 'Cl' on the right. Below the navigation bar, the breadcrumb 'Manage payments > New ACH enrollment' is visible. The main heading is 'About the provider', with a link to 'View a list of field definitions here.' The form is organized into three sections: 'Provider information', 'Provider identifiers information', and 'Provider contact information'. Each section contains input fields for various identifiers and contact details, with checkboxes to indicate if certain information is missing.

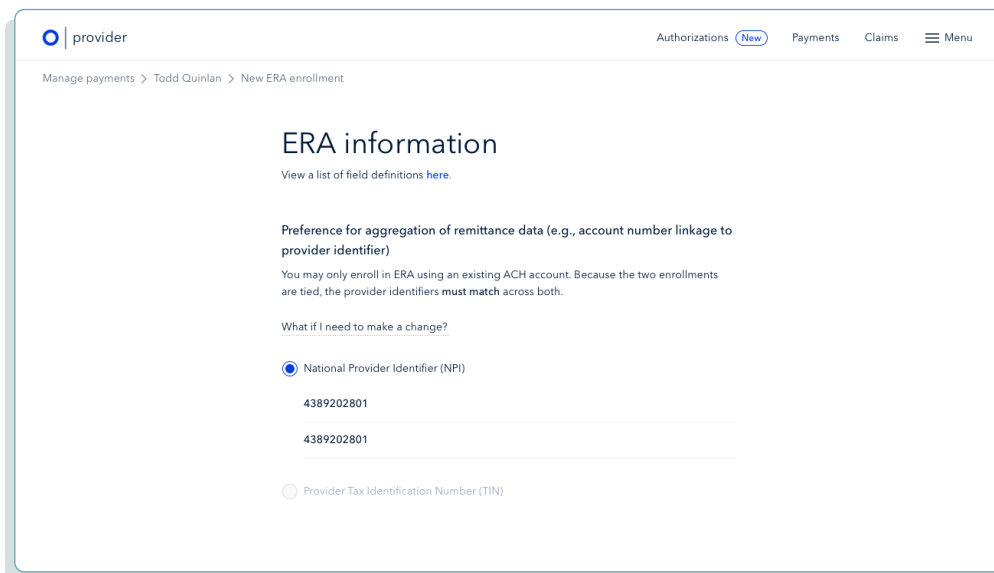
Section	Field Name	Value
Provider information	Provider name	Todd Quinlan
Provider identifiers information		
Provider Federal Tax Identification Number (TIN)	43-48917824	
Employer Identification Number (EIN)	43-48917824	
National Provider Identifier (NPI)	8921748321	
<input type="checkbox"/> There is no appropriate NPI associated with this provider or entity.		
Provider contact information		
Provider contact name	Ted Buckland	
Telephone number	(482) 390-3910 ext. 29	
Email address	tedbuckland@sacredheart.com	
<input type="checkbox"/> There is no email associated with this provider or entity.		
Fax number	(482) 201-3948	

Step 2 Financial institution information

New

When enrolling in ERA, the preference for **aggregation of remittance data** will be pre-populated based on the ACH enrollment details for **account number linkage to provider identifier**.

Note: Once an ACH enrollment has a connected ERA enrollment, these TINs and NPIs cannot be changed. Users must add all TINs or NPIs to the ACH enrollment before enrolling in ERA. The alternative is to cancel both enrollments and start a new enrollment form.



The screenshot shows a web interface for a provider. At the top, there is a navigation bar with the provider's name 'provider' on the left and 'Authorizations' (with a 'New' badge), 'Payments', and 'Claims' on the right. Below the navigation bar, the breadcrumb trail reads 'Manage payments > Todd Quinlan > New ERA enrollment'. The main heading is 'ERA information', with a link to 'View a list of field definitions here'. The section is titled 'Preference for aggregation of remittance data (e.g., account number linkage to provider identifier)'. A note states: 'You may only enroll in ERA using an existing ACH account. Because the two enrollments are tied, the provider identifiers must match across both.' Below this, a question asks 'What if I need to make a change?'. There are two radio button options: 'National Provider Identifier (NPI)' (which is selected) and 'Provider Tax Identification Number (TIN)'. Under the NPI option, there are two input fields, both containing the value '4389202801'.

To Edit/cancel: The user cannot make any edits to the **ERA information** page. The preference for **aggregation of remittance data** will be pre-populated based on the ACH enrollment details for **account number linkage to provider identifier**.

Step 3 Submission information

New

In the ERA enrollment form, the user must note the reason for form submission and provide an electronic signature. These are fields required by CAQH.

To Edit: When editing **submission information**, the user can choose to **change enrollment** or **cancel enrollment**. The user must also provide an updated signature to authorize the changes to the enrollment.

Step 4 Complete application

New

Once the user completes their ERA enrollment form, they must share the Change Healthcare enrollment form with their clearinghouse. Upon completion of this step, the user must return to the enrollment details page and complete their ERA enrollment.

