

# Manage Clearinghouse Connections

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The Clearinghouse Connection side panel contains information on the electronic connection with the payer. Quickly see what payer products this payer offers, if an agreement is required and if you have an agreement on file.

Follow the steps below to learn how to view and access this information.

1. Select **Customer Setup > Payers**.
2. Use the **Show All** button to view all payers. Or use the **Search** field to further drill down your search.
3. Select the **payer**.
4. Locate and click on the **Clearinghouse connection** tab from the right-hand side panel.
5. See the current payer connection in the **Clearinghouse connection** field.



Clearinghouse Connection  
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1. **Optional:** Click the  icon to remove the electronic connection.
2. **Optional:** Click the  icon to use a new payer electronic connection.

1. Use the **Master Payer Search** window to search for your payer.

1. Search for the payer by using the name, Payer ID or CPID number, then click Search.
2. Select the **payer**.

 Unable to locate a connection with a specific payer in CollaborateMD? This may indicate that ePS does not have an electronic connection with that payer, and the payer is not on the master list. To request that ePS add an electronic connection for a payer, please contact your support or implementation specialist.

 Payers with a blank CPID are paper payers.

6. Payer Products your selected payer supports will have the  icon.
7. Any products that require an agreement be completed will contain the Agreement Required link.

✓ Electronic Remittance Advice (ERA)  
Agreement Required

 Ready to start working on the agreement? Click the  shortcut to the payer agreements screen.

1. **Optional:** Click on the **Agreement Required** link to see if your providers have an agreement on file.
  8. Click **Save**. Otherwise, click **Close** if no changes were made.
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