

ePS Claim Attachments

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Getting Started with Claim Attachments

In order to begin using the **Claim Attachments** feature, there are three important steps that must be completed before you can submit attachment claims.

- **Step 1:** You must first enable and configure the **Claim Attachments** feature from the services section of CollaborateMD. Visit our [Manage Claim Attachments Help Article](#) for detailed steps on how to enable and configure this feature.
- **Step 2:** You must also enable and configure the **Cloud Document Imaging** feature from the services section of CollaborateMD. Visit our [Manage Cloud Document Imaging Help Article](#) for detailed steps on how to enable and configure this feature.
- **Step 3:** You must add your Attachment Payers to your personal Payer list. Visit our [Add ePS Claim Attachment Payers Help Article](#) for detailed steps on how to add attachment payers to your local list.

Once these steps are completed, you can then start to bill attachment claims.


Add ePS Claim Attachment Payers

In order to bill attachment claims, you must first add your Attachment Payers to your personal Payer list. Attachment Payers are created the same way you create any other payer within the Payer Screen. The only difference is that Attachment Payers will show an "**Electronic Claim Attachments**" column in the master payer list and the Clearinghouse connection side panel will also show if electronic claim attachments are available for the payer.

Follow the steps below to create a payer record that supports ePS electronic claim attachments.

1. Select **Customer Setup > Payers**.
2. Click the **New Payer** button.
3. A window pops up asking you if you like to configure a Clearinghouse connection for this payer. Click **Yes**.
4. Use the **Master Payer Search** window to locate your payer.
 1. Search for the Payer by using the name or the Payer ID, then click **Search**.

2. Ensure the payer has a checkmark in the electronic claim attachments column, and select the payer.
5. Finish entering the payer's **information** and **Billing Options**.
6. Click **Save**.

 After creating your Payer, any agreements required to send claims, receive remittances, or check eligibility will need to be filled out and approved.

Please reference our [New Payer Agreement Help Article](#) for step-by-step instructions.

Uploading & Submitting ePS Claims with Electronic Attachments

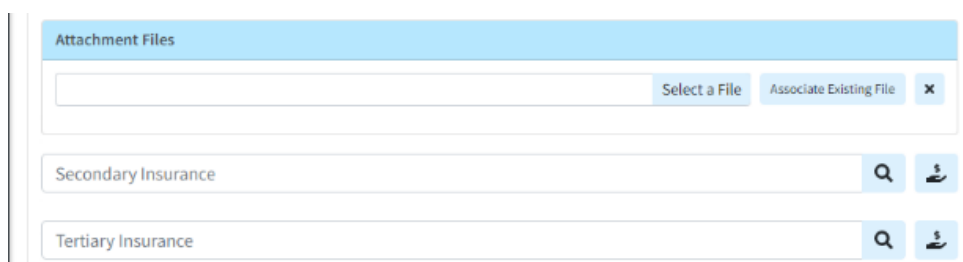
Once you have enabled Claim Attachments in your account, Created your Attachment payers, and submitted any applicable payer agreements, you can begin uploading and submitting your claim attachments.

Follow the steps below to upload and submit an Attachment claim.


1. Select **Claim > Claim**.
2. Create your Professional or Institutional claim and ensure your Attachment Payer is added to the claim.

 Please reference our [Claims Help Article](#) for step-by-step instructions.

3. Under the **Claim** tab, locate the **Attachment File** section for your attachment Payer.



The screenshot shows a software interface with a light blue header bar labeled "Attachment Files". Below the header is a text input field with a "Select a File" button, an "Associate Existing File" button, and a close "x" button. Below this are two rows of input fields: "Secondary Insurance" and "Tertiary Insurance". Each row has a search icon (magnifying glass) and a save icon (floppy disk) to its right.

 Always verify with your payer, as some payers require adherence to a specific naming convention for file names.

4. There are 2 options to upload the attachment files:

1. Upload a file from your computer:

1. Click the **Select a File** button to locate and upload the attachment to the claim (up to 9 files).


2. Associate an existing file from the **Documents** section:

1. Click the **Associate Existing File** button to locate and upload the attachment to the claim (up to 9 files).

2. Use the navigation bar or the **Search** field to locate the document(s).


3. Place a check in the box for the document(s) you want to associate with this patient

4. Click **Add**.

 **Document Imaging** must be enabled to begin adding and storing documents onto the CollaborateMD server. Please reference our [Manage Cloud Document Imaging](#) for step-by-step instructions. Always verify with your payer, as some payers require adherence to a specific naming convention for file names.

5. **Optional:** The ACN information can be added within the **Additional Info** tab, under Documentation Method

6. **Save** and **Submit** the claim.

 **Please Note** that Attachment Claims cannot be sent through the batch claim process and must be submitted individually with real-time claim submission.
