Electronic funds transfer and online remittance reports for medical and behavioral health care professionals
OVERVIEW

This course explains how to:

- Enroll in electronic funds transfer (EFT)
- Change EFT account information
- Access and view your online remittance reports
- Change report delivery preferences
**EFT ENROLLMENT**

Benefits and how to enroll

When your enroll, you’ll be able to:

- Receive payments directly into your checking or savings account – no mail delays
- Have access to funds on the day of payment
- Receive bulk deposits instead of multiple separate checks
- Increase efficiency and improve cash flow
- View and share remittance reports on the day of payment

Two ways to enroll:

- Council for Affordable Quality Healthcare (CAQH) website: [https://Solutions.CAQH.org](https://Solutions.CAQH.org)
  *Use this option to enroll in EFT with multiple payers, including Cigna.*
- Cigna for Health Care Professionals website: [CignaforHCP.com](http://CignaforHCP.com)
  *Use this option to enroll in EFT with only Cigna.*

* Requires the appropriate level of CignaforHCP.com access. Ask your office’s primary administrator for this website to assign you access to this functionality.
LOG IN TO THE WEBSITE

Log in to CignaforHCP.com

Type your User ID and Password, then click LOGIN.
ENROLL IN A NEW EFT ACCOUNT

To enroll in a new EFT account or change an existing account, click WORKING WITH CIGNA.
CHANGE AN EXISTING EFT ACCOUNT

To enroll in a new EFT account, click Enroll in Electronic Fund Transfer (EFT) Options.

If you do not see this section on the page, you do not have the level of website access necessary to enroll in EFT. Ask your office’s primary administrator for this website to assign you access to this functionality.
ENROLL IN A NEW EFT ACCOUNT (CONT.)

Choose the Taxpayer Identification Number (TIN) you want to enroll in EFT.

Choose a payment bulking preference.*

Select a Provider/Group.

If you use more than one TIN, you will need to complete an EFT enrollment for each TIN.

* NPI bulking election groups all claims into a payment based on each “Billing Provider” NPI from your submitted claims.
If you select NPI as your EFT payment preference, this screen will appear.

Select the NPI(s) you want to link to the bank account. If you use more than one bank account, you must complete an enrollment for each TIN or NPI bank account combination.

If you do not see one of your NPIs in the box above, you can add up to five NPIs. You must first select an NPI in the box above.

Select the Provider/Group Name(s) associated with the NPI you are adding, then click ADD.
ENROLL IN A NEW EFT ACCOUNT (CONT.)

1. Enter the Provider Contact Information of the person who will act as the contact for the EFT account.

2. Choose the type of account to which funds will be deposited. For savings account deposits, you must first verify that your bank will support EFT.

3. Enter the financial institution information of the account that will receive the electronic payments.

4. Click NEXT.

* With NPI bulking, all NPIs under a TIN will receive EFT payments. EFT payments will be made into the default account for any NPIs that are not associated with a specific bank account.
ENROLL IN A NEW EFT ACCOUNT (CONT.)

You’ll have an opportunity to review the TIN, NPI, Provider/Group, contact information, and bank account information you chose or entered before completing your EFT enrollment.

What happens next in the EFT enrollment process?

We’ll send a “pre-note transaction” to your bank to verify that all banking-related information is correct.

- **If the pre-note is not returned, you will begin receiving EFT on the next payment cycle**
- **If the pre-note is returned with errors, Cigna will contact you to obtain corrected information**

This process can take four to six weeks. You can check the status of your EFT enrollment by logging in to CignaforHCP.com > Working With Cigna > Manage EFT Settings.
CHANGE AN EXISTING EFT ACCOUNT
To change an existing EFT account, click Manage EFT Settings.

If you do not see this section on the page, you do not have the level of website access necessary to change EFT settings. Ask your office's primary administrator for the website to assign you access to this functionality.
CHANGE AN EXISTING EFT ACCOUNT (CONT.)

Select a TIN

Select the tax identification number (TIN) of the provider or group for which you want to view and change the EFT account settings.

TIN: Select a Provider  Clear List

Select the TIN for which you want to change EFT account information.
For the chosen Provider/Group, click Change EFT Settings.

If you want to terminate your EFT account, click Cancel EFT Settings.

<table>
<thead>
<tr>
<th>Provider/Group Name</th>
<th>Tax Identification Number (TIN)</th>
<th>EFT Settings</th>
<th>Remittance Report Delivery Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>JACKSON, DIAMOND MD</td>
<td>123456789</td>
<td>Enrollment/Update Status: Complete EFT Payment Preference: TIN</td>
<td>Delivery Preference</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provider Contact Name: zdfgd</td>
<td>Online Only</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Title: Add</td>
<td>Update Delivery Preferences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Email Address: Add</td>
<td></td>
</tr>
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</tr>
<tr>
<td></td>
<td></td>
<td>Account Number: ******3333</td>
<td></td>
</tr>
</tbody>
</table>

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You can change your payment bulking preference to TIN or NPI

Note: If you change your payment bulking preference, it will apply to all of the EFT enrollments associated with your TIN.

TIN bulking election groups all claims into a payment based on your TIN and payment address.
NPI bulking election groups all claims into a payment based on each “Billing Provider” NPI from your submitted claims.

Select the NPI(s) you want to link to this bank account.
CHANGE AN EXISTING EFT ACCOUNT (CONT.)

You can change the name, telephone number, and extension of the person who acts as the contact for the EFT account.
You can change the type of account to which funds will be deposited*.

You can change the routing number and account number** of the account that will receive the electronic payments.

* For savings account deposits, you must first verify that your bank will support EFT.
** Use the check example to ensure that you are entering the correct numbers.
CHANGE AN EXISTING EFT ACCOUNT (CONT.)

You’ll have an opportunity to review the TIN, NPI, Provider/Group, contact information, and bank account information you chose or entered before completing the change to your EFT enrollment.

Check the Terms of Service box; then click SUBMIT.
VIEW REMITTANCE REPORTS
SEARCH FOR A REMITTANCE REPORT

Once your EFT enrollment is complete, you will be able to access and view your remittance reports online the same day you receive your electronic payment.

1. Choose any of four ways to search for a remittance report.
2. Complete the search criteria fields.
3. Choose how you want to search.
4. Choose the TIN involved in your search.
5. Click SEARCH.

If searching by deposit, you can enter a dollar amount, leave the field blank for all deposits and zero pays, or enter 0 for zero pays only.*

If you do not see the Remittance Reports link, you do not have the level of website access necessary to view reports. Ask your office’s primary administrator for this website to assign you access to this functionality.

* Limited search dates required for last two options due to volume.
SEARCH FOR A REMITTANCE REPORT

Once your EFT enrollment is complete, you will be able to access and view your remittance reports online the same day you receive your electronic payment.

When you search by claim reference number, all remittance reports that include the claim number searched will appear.

The Remittance Trace Reassociation Number (TRN) is:
- Sent to the bank with the deposit
- Included in the 835 Electronic Remittance Advice transaction
- Noted in the claim detail.

If you do not see the Remittance Reports link, you do not have the level of website access necessary to view reports. Ask your office’s primary administrator for this website to assign you access to this functionality.
VIEW A REMITTANCE REPORT

A list of remittance reports meeting your search criteria will appear.

Remittance Reports

You Searched For:
Deposit Amount: $499.98  |  Deposit Dates: 5/4/2012 to 5/11/2012 (7 days)
Search Results are +/- $50

MODIFY SEARCH  NEW SEARCH

Instructions: Reports that are more than 100 pages must be viewed in segments by selecting an option from the page range dropdown.

<table>
<thead>
<tr>
<th>Remittance Tracking Number</th>
<th>Tax Identification Number</th>
<th>Payment Date</th>
<th>Deposit Amount</th>
<th>Product Type</th>
<th>Report Type</th>
<th>Number of Pages</th>
<th>Unread or Read</th>
<th>View PDF</th>
</tr>
</thead>
<tbody>
<tr>
<td>111230090000004</td>
<td>954022405</td>
<td>04/17/2012</td>
<td>$499.98</td>
<td>Choice Fund HRA Open Access Plus</td>
<td>Remittance Report</td>
<td>2</td>
<td></td>
<td>1.2 View PDF</td>
</tr>
</tbody>
</table>

Click the View PDF link to view the remittane report. Once you open the report, you can save it or send it to others.

Note: You may see the claim detail and remittance report for just a certain individual claim that was paid via EFT. Click the Claims icon on the dashboard, and then “Search Claims.”

Once you view the PDF, the indicator will automatically change to Read. You can mark reports as Read or Unread.
CHANGE REPORT
DELIVERY PREFERENCES
CHANGE REPORT DELIVERY PREFERENCES

Remittance reports are available electronically, although occasionally you may have a need to temporarily receive paper remittance reports as well.

To change your remittance report delivery preferences, click Manage EFT Settings.
Click Update Delivery Preferences to temporarily receive paper remittance reports. Reports will still also continue to be available electronically.