



# Electronic Billing Presentment & Payment (EBPP) System Overview

For IBX Client Advisors and Core Fully Insured Clients Only

**Independence** 

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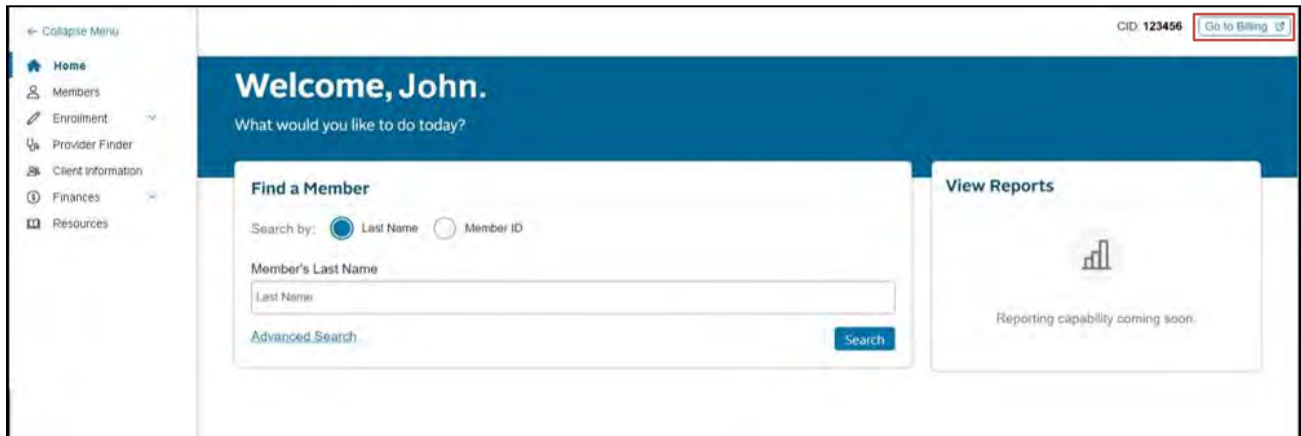
# Overview

## About EBPP

EBPP is an optimized payment system that is user friendly, convenient, and easy to navigate. With EBPP, users will experience a streamlined payment process that offers increased operational efficiency, ultimately enhancing their overall experience.

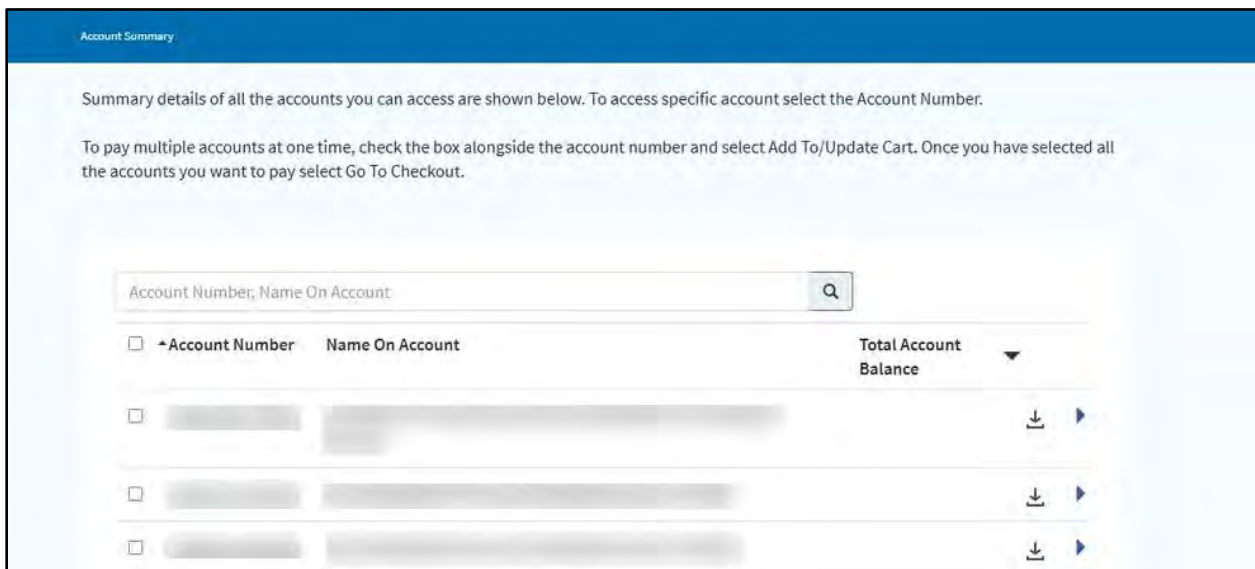
## Accessing EBPP – Client and Client Advisors

EBPP can be easily accessed by any user from the Group Portal Homepage. Once logged into the group portal, click **Go to Billing** button from the top toolbar of the **Group Portal Homepage**.



## Summary Account View

The EBPP **Summary Account View (SAV)** is the landing page providing users with access summary details of all accounts that they can access through Group Portal across funding types including Fully Insured Group, Medicare Group, and Self-Funded. Users can access individual accounts or use the shopping cart functionality to select one or multiple accounts to add to cart and pay.





The leading digit in the account number differentiates account types. Account numbers beginning with 1 - Self-Funded, 3 - Medicare Group, 4 - Fully Insured.

## EBPP – Core Fully Insured

### Summary Account View Functionality

The CFI users can use Summary Account View in EBPP to perform the following operations:

1. Pay Multiple BTAs using shopping cart functionality
2. Download current invoice
3. Access the Account Summary

### Paying multiple BTAs using shopping cart functionality

To schedule perform the following steps:

1. Select the checkbox(s) next to the accounts you want to pay or select the top checkbox to select all.

The screenshot displays the 'Account Summary' page. At the top, there is a search bar labeled 'Account Number, Name On Account'. Below the search bar, a table lists accounts with columns for 'Account Number', 'Name On Account', and 'Total Account Balance'. A red box labeled '1' highlights the first column of checkboxes, which are all checked. Below the table, it says 'Showing 1 to 9 of 9 Accounts Found'. At the bottom, there is a 'Selected Accounts' section showing 'Number Of Accounts: 9' and 'Total Payment Amount: \$4,500.00'. A 'Go To Checkout' button is located at the bottom right.

<input checked="" type="checkbox"/>	Account Number	Name On Account	Total Account Balance
<input checked="" type="checkbox"/>	400 30002	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30003	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30004	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30005	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30006	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30007	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30009	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30011	[REDACTED]	\$500.00
<input checked="" type="checkbox"/>	400 30012	[REDACTED]	\$500.00

2. Review the number of accounts selected and total **Payment Amount** then click **Go to Checkout**.

Showing 1 to 9 of 9 Accounts Found

Selected Accounts	
Number Of Accounts:	9
Total Payment Amount:	\$4,500.00

**2** Go To Checkout **2**

3. Review selected accounts, payment details, and click continue.

**Note:** Users can edit the information by selecting **Edit** or cancel by selecting **Cancel**.

Selected Accounts List

Account Number	Name On Account	Total Amount
4000 02		\$500.00
4000 03		\$500.00
4000 04		\$500.00
4000 05		\$500.00
4000 06		\$500.00
4000 07		\$500.00
4000 09		\$500.00
4000 11		\$500.00
4000 12		\$500.00

Showing 1 to 9 of 9 Accounts Found

**3** Payment Details

Payment Method: Checking ending in 2345

Payment Date: 04/20/2026

Total Payment Amount: \$4,500.00

By clicking **Confirm** to confirm your payment, you authorize us to initiate a debit from the **Payment Method Account** to make a payment to the **Accounts**, as detailed above. The payment to your accounts will be made on the **Payment Date** detailed above, and the debit from your account will occur within two business days of that date, but no earlier than that date. You also authorize your financial institution (and its successors or assigns), to process this debit to your accounts.

**3** Continue Edit Cancel

- The payment confirmation page will display providing a unique confirmation number for each payment amount, the payment status of the payment and the total amount of each payment. It will also confirm if all payments processed successfully. The SAV shopping cart functionality will not allow duplicate payments to be processed. Users will receive an error message if a payment was already requested for an account.

**9 of 9 Payments got Confirmed.**  
 Details of the accounts you have paid are shown below. A separate payment has been processed for each account, and the individual confirmation numbers are shown below. You will also receive a separate email confirming each payment.

**Payment Details**  
 Payment Method: [Redacted] Checking ending in 2345  
 Payment Date: 04/20/2026

**Payments Confirmed**

Billing Area Name	Account Number	Name On Account	Confirmation Number	Payment Status	Total Amount
[Redacted]	4000-02	[Redacted]	I83F58VYZK	Scheduled	\$500.00
[Redacted]	4000-03	[Redacted]	I83F58VZJ	Scheduled	\$500.00
[Redacted]	4000-04	[Redacted]	I83F58VY43	Scheduled	\$500.00
[Redacted]	4000-05	[Redacted]	I83F58VY4N	Scheduled	\$500.00
[Redacted]	4000-06	[Redacted]	I83F58VY4Y	Scheduled	\$500.00
[Redacted]	4000-07	[Redacted]	I83F58VY4S	Scheduled	\$500.00
[Redacted]	4000-09	[Redacted]	I83F58VY4Q	Scheduled	\$500.00
[Redacted]	4000-11	[Redacted]	I83F58VY44	Scheduled	\$500.00
[Redacted]	4000-12	[Redacted]	I83F58VYJV	Scheduled	\$500.00

Showing 1 to 9 of 9 Accounts Found

**Note:** Payment confirmation can also be viewed on the Account Summary page for the individual account.

Alerts Account Summary My Profile Switch Account

Information about your account and any recent payment is shown below.

Select an option below to schedule payments or view details of recent payments & your payment method

Details for Account: [Redacted] 4000-02 [Switch Account](#)

Current Due Date: 01/01/2026 Last Payment Date: N/A  
 Current Statement Balance Amount: \$500.00 Last Payment Amount: N/A  
 Amount Past Due: \$0 Confirmation Number: N/A

[Setup Recurring](#) [Payment Actions](#)

I would like to...  
[View Payment Activity](#)

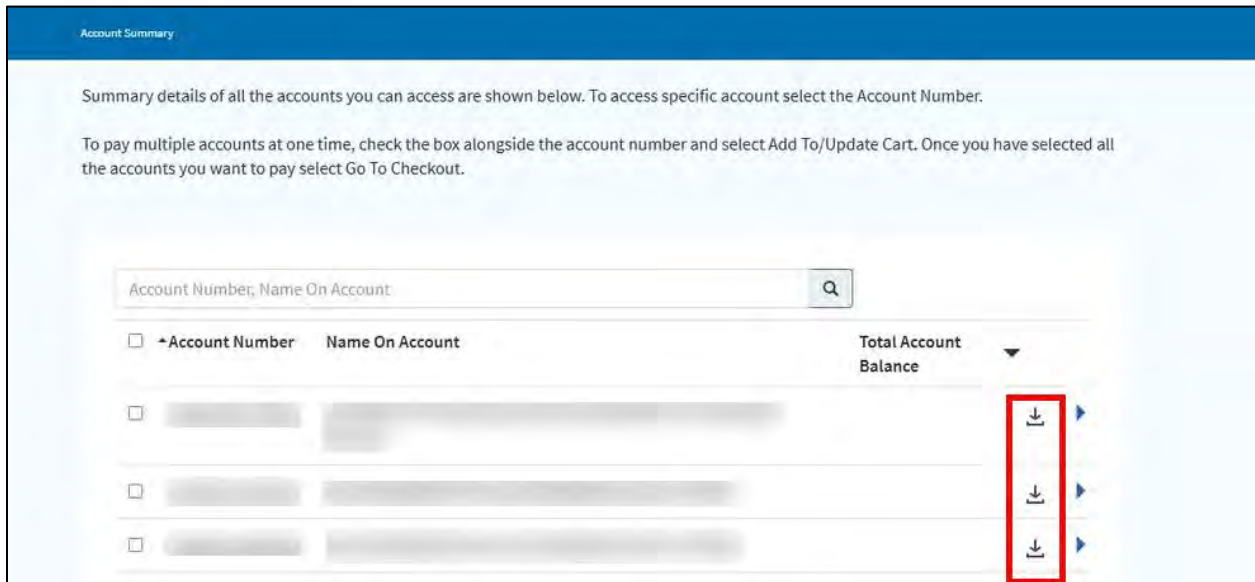
View Payment Activity [All Payments](#) [+/-30 Days](#)

Showing 1 to 1 of 1 Payments

Scheduled Date	Total Amount	Payment Method	Payment Status	Confirmation Number
04/20/2026	\$500.00	Checking ending in 2345	Scheduled	I83F58VYZK

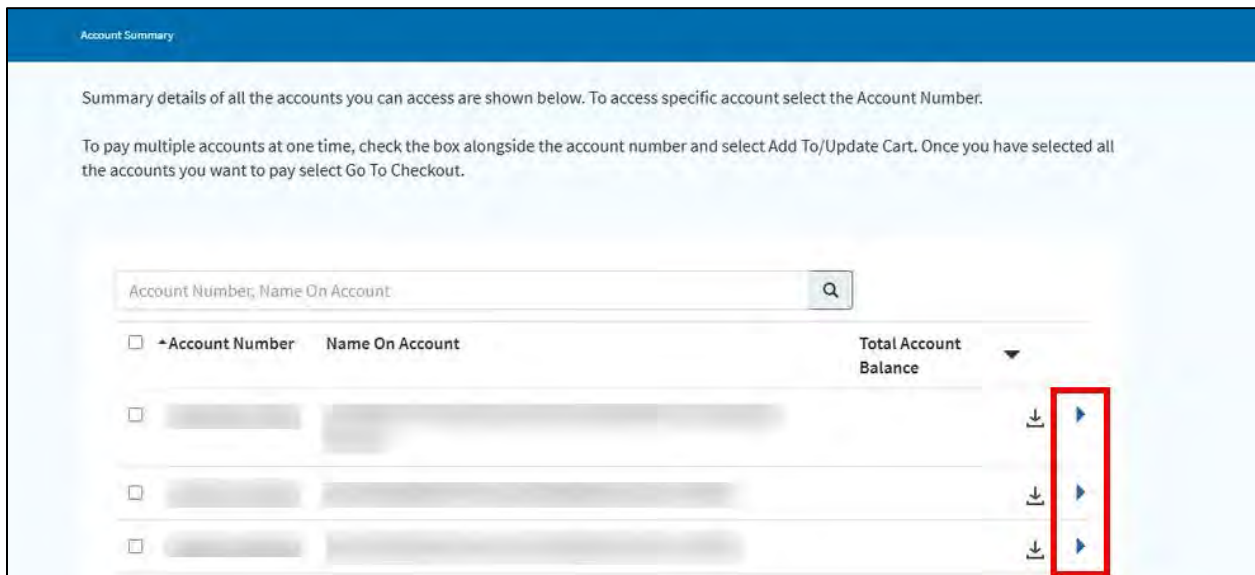
## Download the Current Invoice

To download the current invoice, click the download icon for the specific account.



## Accessing the Account Summary.

To access the Account Summary for a specific BTA, click the blue arrow.



## Account Summary

The EBPP **Account Summary** is displayed with information about the individual account and any recent payment. From the Account Summary you can navigate to view **Profile** details and **Alerts**.

Information about your account and any recent payment is shown below.

Select an option below to schedule payments or view details of recent payments and your payment methods.

Details for Account: **HORIZON HEALTH SOLUTIONS LLC DCA | 789012**

Last Statement Date:	<b>04/23/2024</b>	Last Electronic Payment Date:	<b>03/22/2024</b>
Admin Due Date:	<b>04/24/2024</b>	Last Electronic Payment Amount :	<b>\$2,500.00</b>
Total Admin Due:	<b>\$75.00</b>	Confirmation Number:	<b>HZ123YUI0456</b>
Total Claims Due:	<b>\$55.00</b>		<a href="#">View Payment Details</a>

[Set up Claims Recurring Payments](#) [Payment Actions](#)

I would like to...  
Schedule One Time Payment, View Payment Methods, View Billing Statements...

## View Profile Details

To view the profile details, click the **Profile** tab. From here, you view your email address tied to the account.

Details of your profile are shown below.

Email Address : **chris.johnson@ibx.com**

## View Alerts

To view the alerts, click the **Alerts** tab. Here, you can view the details of available alerts and the option to opt in or opt out of the selected alerts.

Alerts Account Summary Profile

Details of available alerts are shown below, along with options to opt in and out of select alerts.

**Note:** To receive text alerts, you will need to link and verify a cell phone number.

**Alert Preferences**

**Receive Via Email?**  
(chris.johnson@ibx.com)

**Enrollment Messages**

Customer Status update	✓
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**Funding Source Messages**

Funding Source Added	✓
Funding Source Edited	✓
Funding Source Deleted	✓

**Payment Messages**

Recurring Payment Rejected - Payment Limits	✓
Recurring Payment Rejected - Overlimit	✓
AutopayRejectPymntNotifyAction	✓

## Account Summary Functionality

Here is the **Account Summary** page of EBPP.

Alerts Account Summary Profile

Information about your account and any recent payment is shown below.

Select an option below to schedule payments or view details of recent payments and your payment methods.

Details for Account: **GALACTIC CLEANING & RESTORATION SERVICES**  
**123456789012345**

Current Due Date:	N/A	Last Electronic Payment Date:	N/A
Total Account Balance:	\$0	Last Electronic Payment Amount:	N/A
		Confirmation Number:	N/A

[Set Up Recurring Payments](#) [Payment Actions](#)

I would like to...  
Schedule One Time Payment, View Payment Methods, View Billing Statements,...



If your Bill to Account is terminated, you will lose access after 90 days to that Bill to Account in EBPP.

The CFI users can use EBPP to perform the following operations:

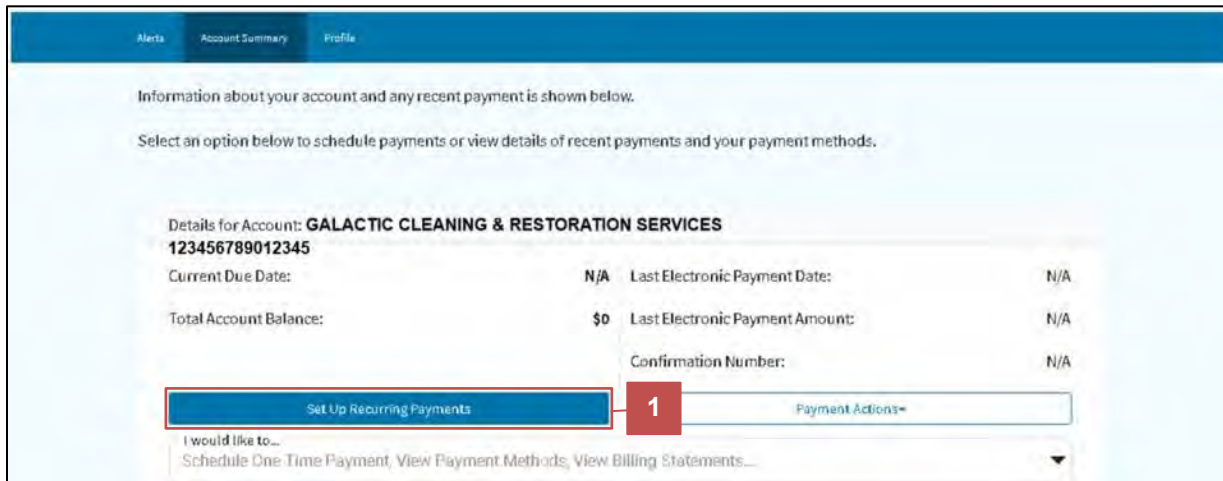
1. [Establish Recurring Payments](#)
2. [Make a One Time Payment](#)
3. [Add Bank Account](#)
4. [Download Billing Statements](#)
5. [View Payment Activity](#)

Let's look at these processes in detail:

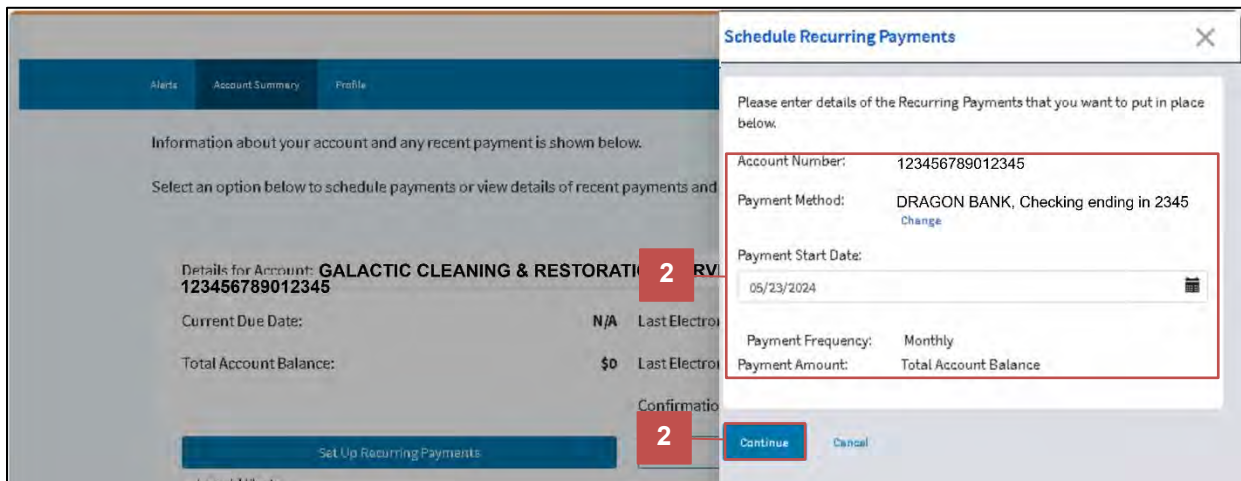
## Establish Recurring Payments

To schedule recurring payments, perform the following steps:

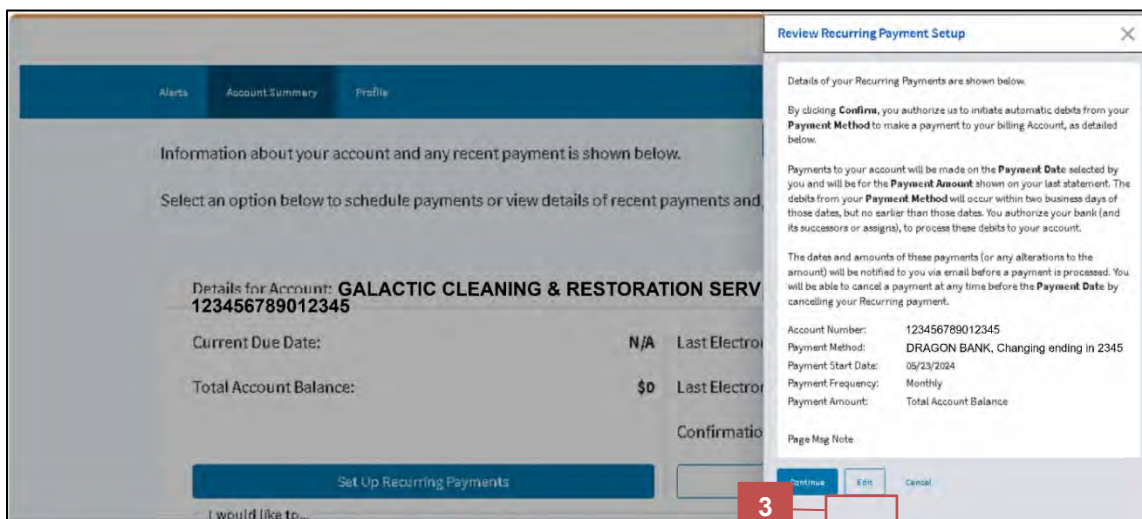
1. Click the **Set Up Recurring Payments** button.



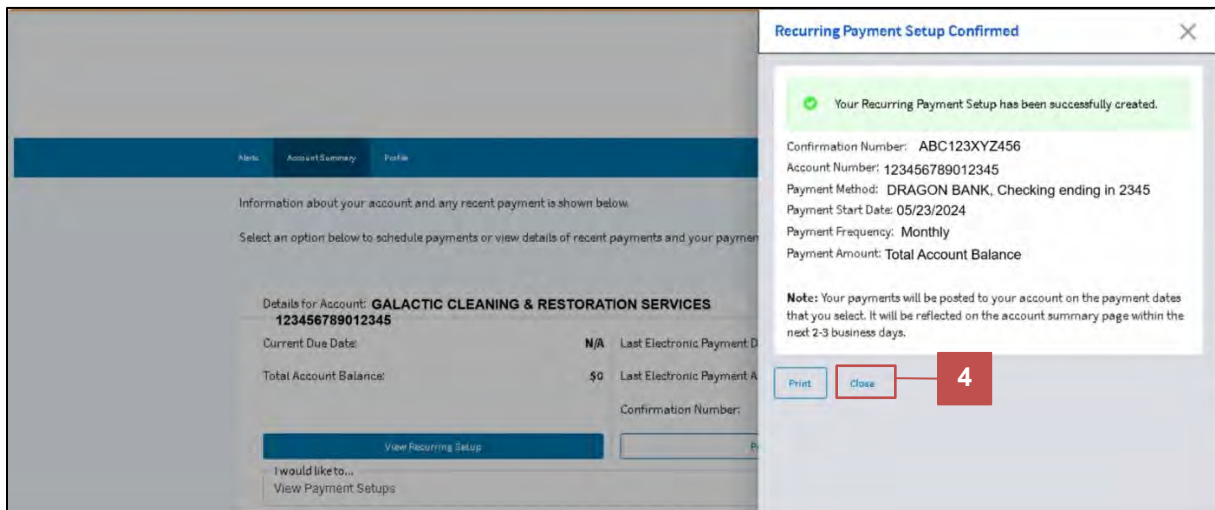
2. The **Schedule Recurring Payments** dialog box is displayed. Enter the required details and click the **Continue** button to save the details.



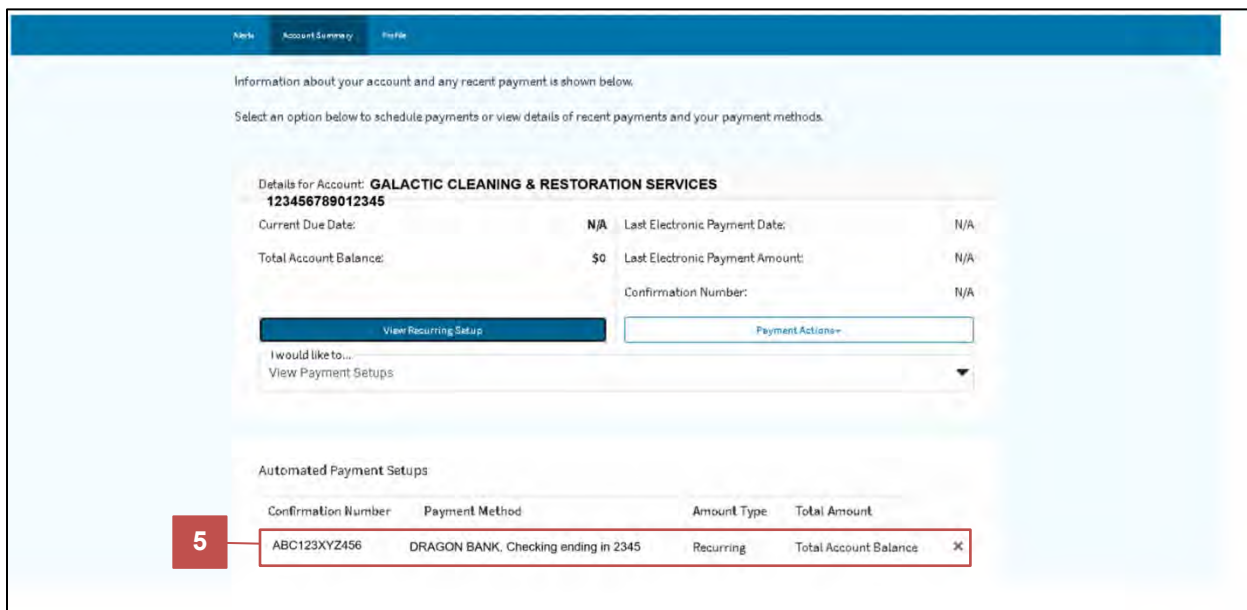
3. The **Review Recurring Payment Setup** dialog box is displayed. Click the **Continue** button.



- The **Recurring Payment Setup Confirmed** dialog box is displayed with the message that your recurring payment has been successfully created. Click the **Close** button to close the dialog box.  
You can click the **Print** button to print the message.



- The recurring payment scheduled is displayed under the **Automated Payment Setups** section. You can click the **X** icon to cancel the payment setup.



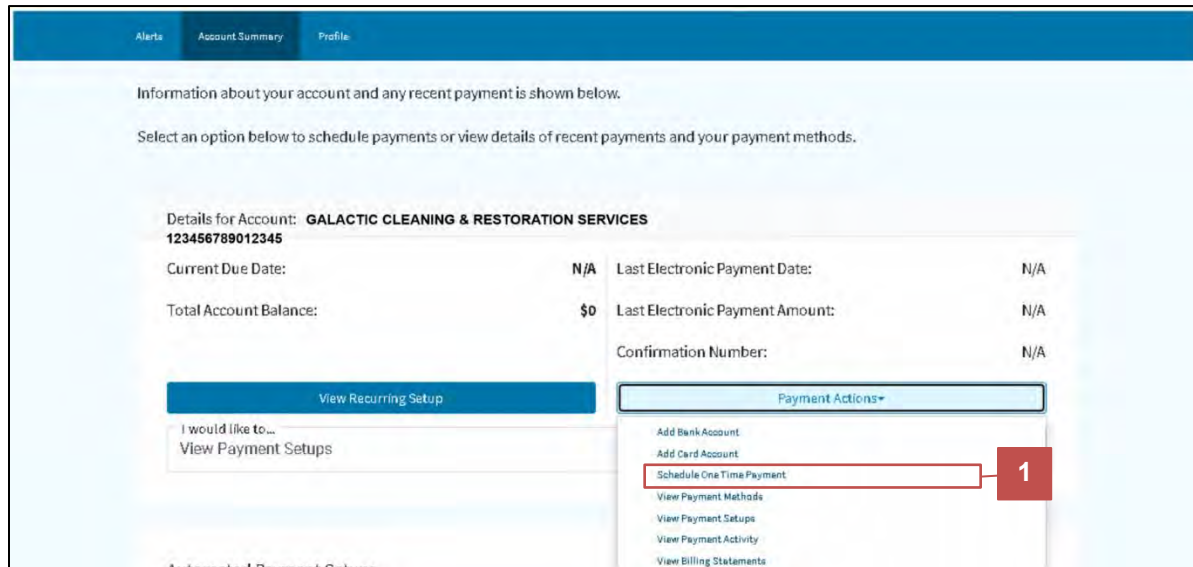
Small groups (PA 2 – 50) can schedule payments by credit card and there is a 3% fee for credit cards.

Users cannot schedule the payment twice.

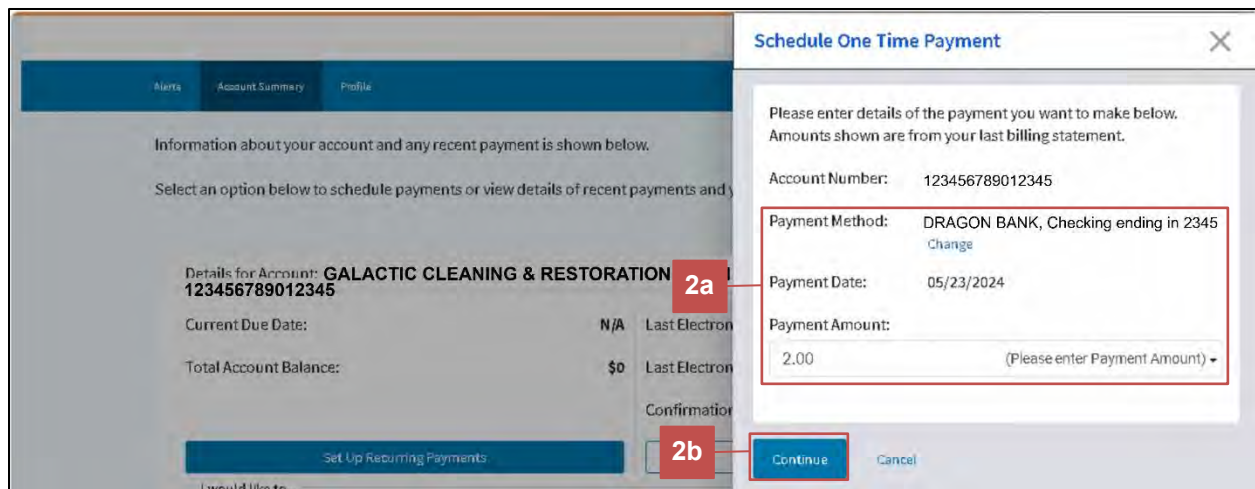
## Make a One Time Payment

To schedule a one-time payment, perform the following steps:

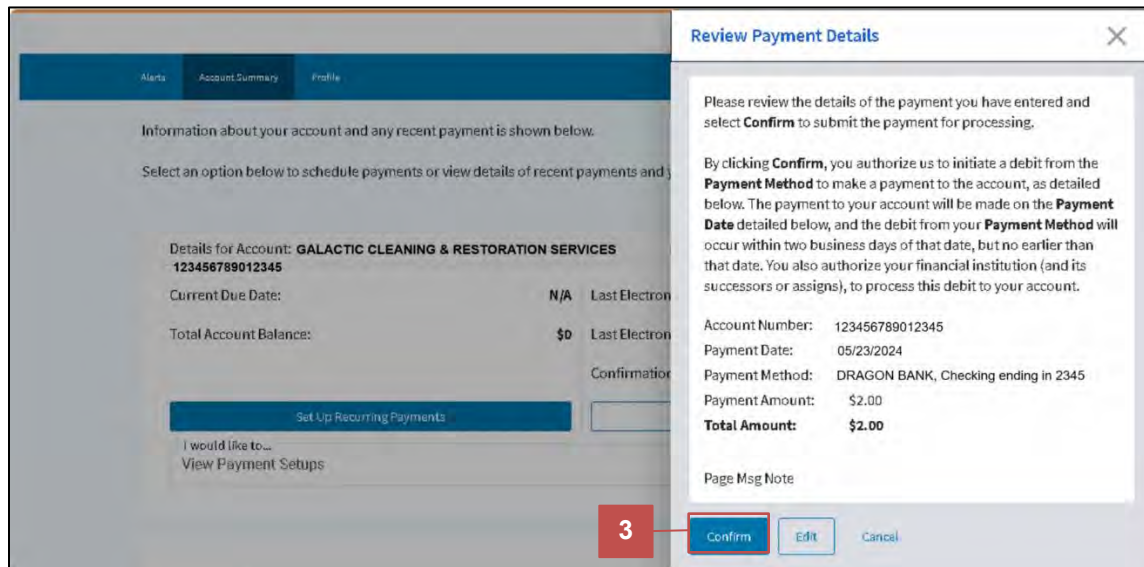
1. Select the **Schedule One Time Payment** option from the **Payment Actions** drop-down field.



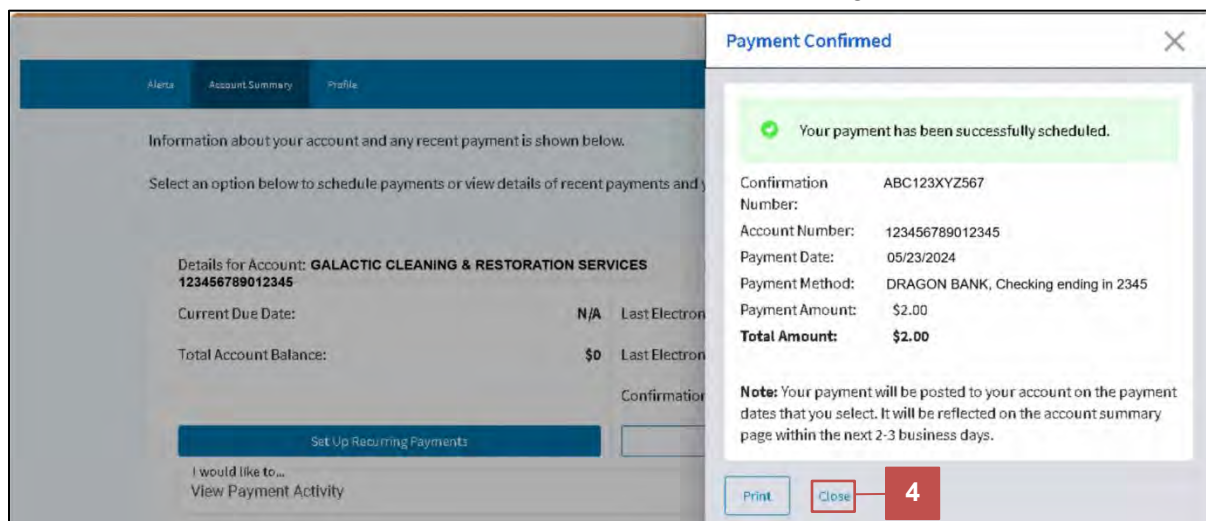
2. The **Schedule One Time Payment** dialog box is displayed.
  - a. Enter the details in the fields as required. You can enter an amount other than the balance in the **Payment Amount** field.
  - b. Click the **Continue** button.



3. The **Review Payment Details** dialog box is displayed. Review the details and click the **Confirm** button.



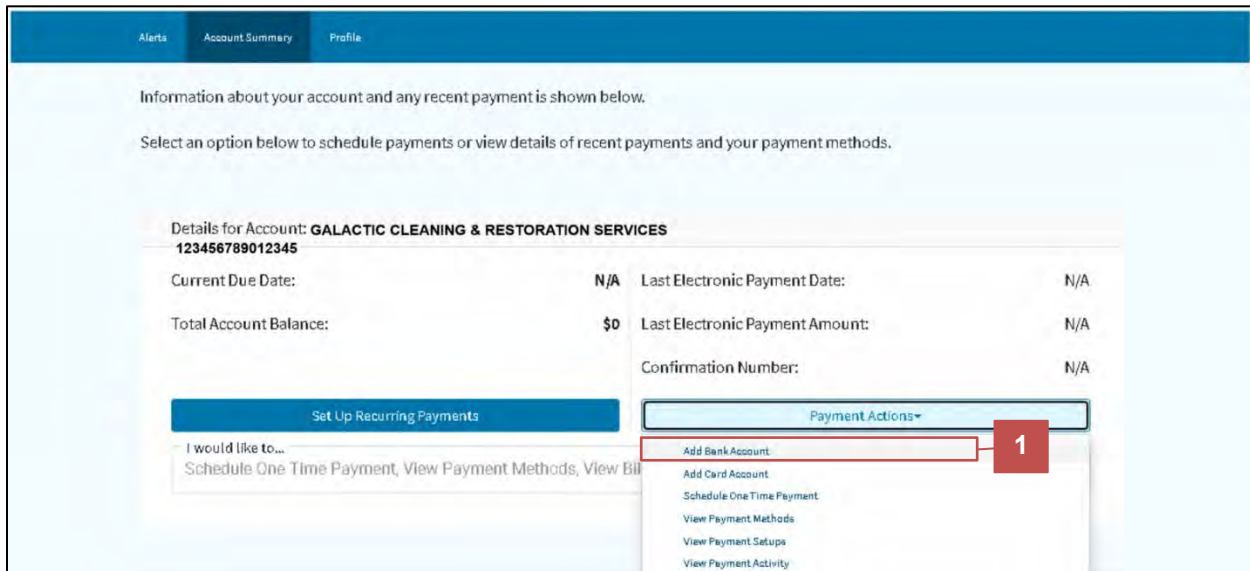
4. The **Payment Confirmed** dialog box is displayed with a message that your payment has been successfully scheduled. Click the **Close** button to close the dialog box. You can click the **Print** button to print the confirmation message.



## Add Funding Sources

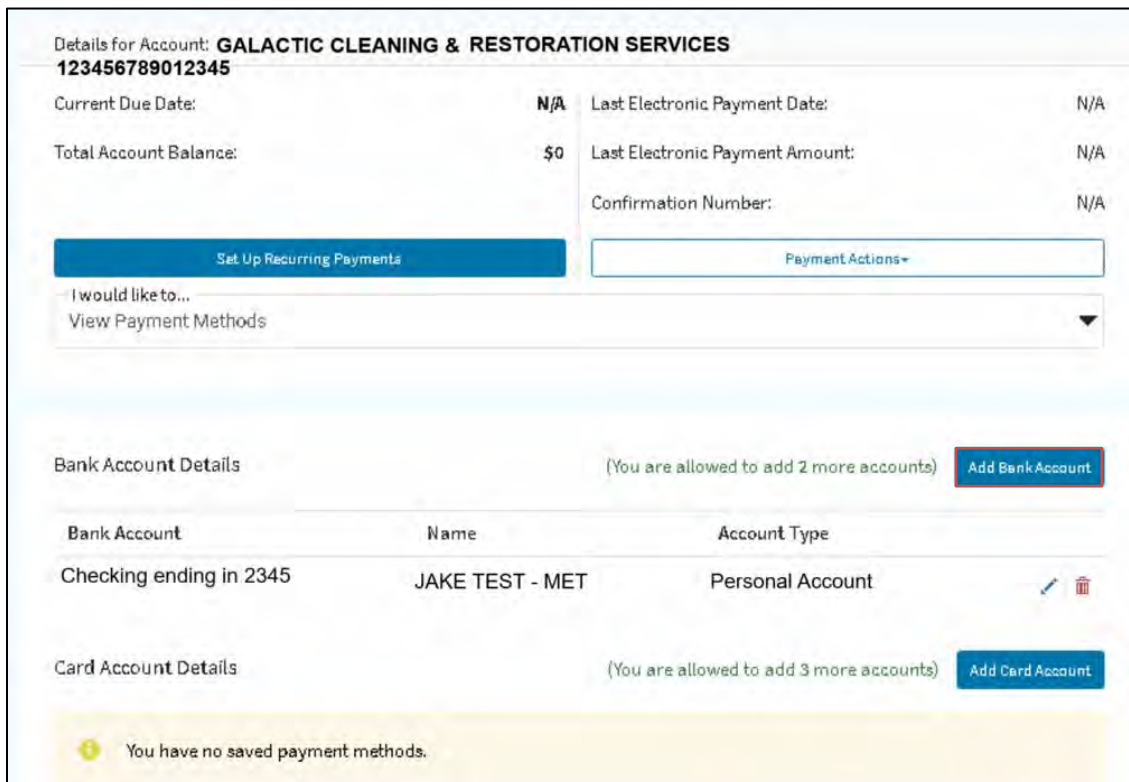
To add funding sources to your profile, perform the following steps:

1. Select the **Add Bank Account** option from the **Payment Actions** drop-down menu.

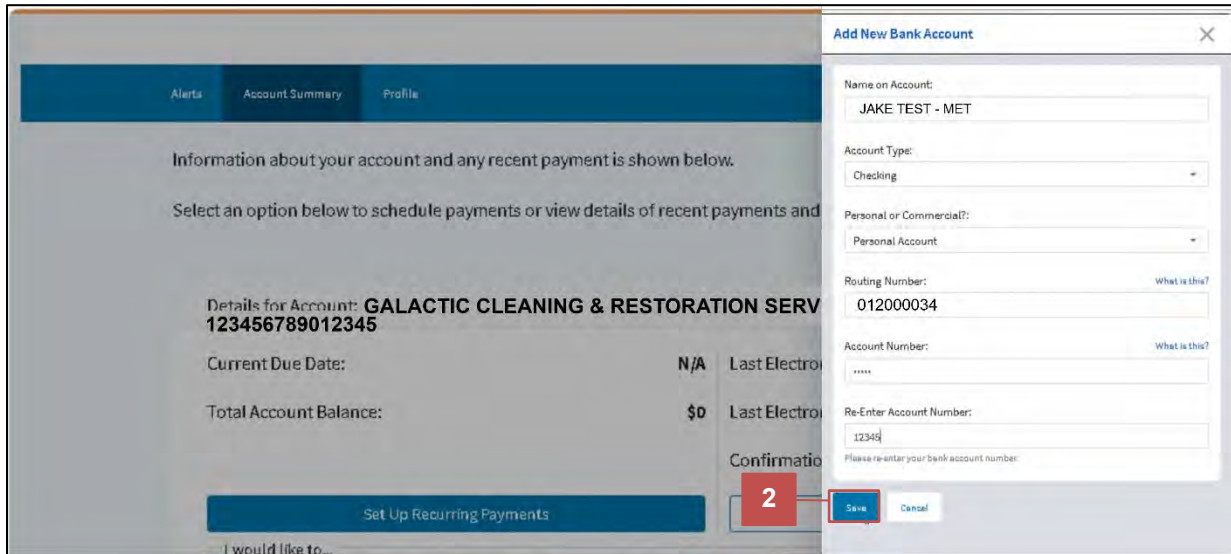


OR

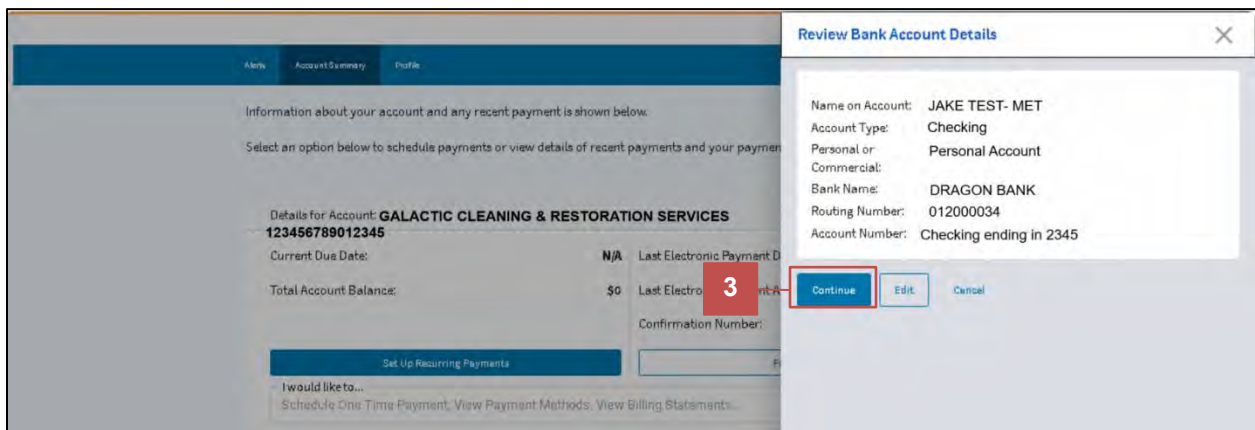
Select the **View Payment Methods** option from the **Payment Actions** drop-down menu. Then, click the **Add Bank Account** button.



2. The **Add New Bank Account** dialog box is displayed. Enter the details in the required fields and click the **Save** button.



3. The **Review Bank Account Details** dialog box is displayed. Review the details and click the **Continue** button.  
You can click the **Edit** button to edit the details added.  
You can click the **Cancel** button to cancel the transaction.



4. The account details are displayed under the **Bank Account Details** section. You can click the **delete** icon to delete the bank account. You can click the **edit** icon to edit the details.

Details for Account: **GALACTIC CLEANING & RESTORATION SERVICES**  
**123456789012345**

Current Due Date: **N/A** Last Electronic Payment Date: **N/A**

Total Account Balance: **\$0** Last Electronic Payment Amount: **N/A**

Confirmation Number: **N/A**

[Set Up Recurring Payments](#) [Payment Actions](#)

I would like to...  
[View Payment Methods](#)

Bank Account Details (You are allowed to add 2 more accounts) [Add Bank Account](#)

✔ Your payment method has been successfully added.

Bank Account	Name	Account Type
Checking ending in 2345	JAKE TEST- MET	Personal Account



You can also add a new bank account by selecting the **Set Up Claims Recurring Payment** option and then, selecting the **New Bank Account** option from the **Payment Methods** drop-down menu.

## Download Billing Statements

To download billing statements, perform the following steps:

1. Select the **View Billing Statements** option from the **Payment Actions** drop-down menu.

Alerts Account Summary Profile

Information about your account and any recent payment is shown below.

Select an option below to schedule payments or view details of recent payments and your payment methods.

Details for Account: **GALACTIC CLEANING & RESTORATION SERVICES**  
**123456789012345**

Current Due Date: **N/A** Last Electronic Payment Date: **N/A**

Total Account Balance: **\$0** Last Electronic Payment Amount: **N/A**

Confirmation Number: **N/A**

[View Recurring Setup](#) [Payment Actions](#)

I would like to...  
[View Payment Setups](#)

- Add Bank Account
- Add Card Account
- Schedule One Time Payment
- View Payment Methods
- View Payment Setups
- View Payment Activity
- View Billing Statements**

- The **Billing Statements** section is displayed with the details of all the billing statements. You can click the **document** icon to download a billing statement.

Details for Account: **GALACTIC CLEANING & RESTORATION SERVICES**  
**123456789012345**


Current Due Date: **N/A** Last Electronic Payment Date: **N/A**  
Total Account Balance: **\$0** Last Electronic Payment Amount: **N/A**  
Confirmation Number: **N/A**

[Set Up Recurring Payments](#) [Payment Actions](#)

I would like to...  
[View Billing Statements](#)

**Billing Statements** 11/23/2023 - 05/23/2024 [Last 6 Months](#)

Showing 1 to 1 of 1 Statements

Statement Dated	Statement Number	Amount Due	
04/23/2024	12345	\$2.00	 <b>2</b>

## View Payment Activity

To view the payment activity for this account, perform the following steps:

- Select the **View Payment Activity** option from the **Payment Actions** drop-down menu.

Alerts Account Summary Profile

Information about your account and any recent payment is shown below.  
Select an option below to schedule payments or view details of recent payments and your payment methods.

Details for Account: **GALACTIC CLEANING & RESTORATION SERVICES**  
**123456789012345**

Current Due Date: **N/A** Last Electronic Payment Date: **N/A**  
Total Account Balance: **\$0** Last Electronic Payment Amount: **N/A**  
Confirmation Number: **N/A**

[View Recurring Setup](#) [Payment Actions](#)

I would like to...  
[View Payment Setups](#)

- Add Bank Account
- Add Card Account
- Schedule One Time Payment
- View Payment Methods
- View Payment Setups
- View Payment Activity** **1**
- View Billing Statements

Automated Payment Setups

The **View Payment Activity** section is displayed with the details of all your payment. You can select the **All Payments** or the **+/- 30 Days** buttons to change the filter accordingly.

Details for Account: **GALACTIC CLEANING & RESTORATION SERVICES**  
**123456789012345**

Current Due Date:	N/A	Last Electronic Payment Date:	N/A
Total Account Balance:	\$0	Last Electronic Payment Amount:	N/A
		Confirmation Number:	N/A

[Set Up Recurring Payments](#) [Payment Actions -](#)

I would like to...  
[View Payment Activity](#)

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View Payment Activity [All Payments -](#) [+/-30 Days -](#)

Showing 1 to 1 of 1 Payments

Scheduled Date	Total Amount	Payment Method	Payment Status	Confirmation Number	
05/23/2024	\$2.00	Checking ending in 2345	Scheduled	ABC123XYZ567	<a href="#">/</a> <a href="#">x</a>