

Adding or Updating Payment Information

Adding or updating payment information occurs on the 6.0 Account Information Screen. Providers can choose the option to receive payment via Electronic Funds Transfer (EFT) or Check.

Adding Electronic Funds Transfer (EFT) Information

1. On the Account Information screen, Select "Electronic Funds Transfer" as the Payment Type from the drop-down menu.
 - Individuals may only add EFT if they own 100% of the bank account.
2. Confirm Payee Name and Address are correct as they were prepopulated from previous screens.
3. Enter the routing number and click "Get Bank Details" to verify bank information.

The screenshot displays a form for adding or updating payment information. The 'Payment Type' dropdown menu is set to 'Electronic Funds Transfer (EFT)'. Below this, there is a 'Routing Number' input field and a 'Get Bank Details' button. The form also includes fields for 'Bank Name', 'Bank Address', 'Payee Name', and 'Payee Address'. At the bottom, there are dropdown menus for 'Account Type' (set to 'Select One') and 'Status' (set to 'Pending'), along with input fields for 'Account Number' and 'Re-Type Account Number'.

If selecting the EFT payment option, a bank letter or voided check must be uploaded on the 8.0 Document Upload Screen in order for payment information to be processed.

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4. Select Account Type: Checking or Savings.
5. Enter and Re-enter the Account Number.
6. Once all correct information has been entered, navigate to the next screen by clicking "Save & Next".

Individual Providers should not enter Group EFT on their file. If a Provider is linked to a Group, any work performed on behalf of a Group will be paid to the Group.

The screenshot shows a web form for adding or updating payment information. The form includes the following fields and buttons:

- Payment Type:** A dropdown menu currently set to "Electronic Funds Transfer (EFT)".
- Routing Number:** A text input field with a "Get Bank Details" button to its right.
- Bank Name:** A text input field.
- Bank Address:** A text input field.
- Payee Name:** A text input field.
- Payee Address:** A text input field.
- Account Type:** A dropdown menu with "Select One" selected.
- Status:** A dropdown menu with "Pending" selected.
- Account Number:** A text input field.
- Re-Type Account Number:** A text input field.
- Effective Date:** A date picker field with the format MM/DD/YYYY.
- End Date:** A date picker field with the format MM/DD/YYYY.
- Buttons:** "Add To Grid" (blue), "Exit" (green), "Back" (green), and "Save & Next" (green).

Two orange boxes highlight the "Account Type" and "Status" dropdowns, and the "Account Number" and "Re-Type Account Number" text fields. Another orange box highlights the "Effective Date" and "End Date" date picker fields.

EFT payment information may take up to 28 days to verify. During this process, multiple records will appear on the Account Information Grid.

These are generated as part of the verification process. Until EFT information is verified, or if the routing information cannot be verified, the payment type will default to check.

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Adding Check Information

1. On the Account Information screen, Select "Check" as the Payment Type from the drop-down menu.
2. Confirm Provider Name and Address are correct as they were prepopulated from previous screens.
3. Once all correct information has been entered navigate to the next screen by clicking "Save & Next".

To change payment information once a Medicaid ID has been granted, users will need to perform Maintenance to end date the current record and add a new record.

The screenshot shows a form with the following fields and buttons:

- Payment Type:** A dropdown menu with "Check" selected.
- Provider Name:** A text field with a prepopulated name.
- Address:** A text field with a prepopulated address.
- Status:** A button labeled "Active".
- Effective Date:** A date picker field with "MM/DD/YYYY" format.
- End Date:** A date picker field with "MM/DD/YYYY" format.
- Buttons:** "Exit", "Add To Grid", "Back", and "Save & Next".

4. When changing payment methods, the current record must be end dated with today's date. The new record will have an effective start date of tomorrow's date.

Payment Type	Routing Number	Account Type	Account Number	Status	Effective Date	End Date	Action
Check				Active	1/15/2016	10/1/2023	 
Electronic Funds Transfer (EFT)		Checking			10/2/2023		 

For further assistance with navigation, invitations, or account creation please contact the Partner Portal Technical Support Center at 877-838-5085. Select option 1 and option 1, again, to speak with a customer service representative.