

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 paper 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 shows a form with the following fields and elements:

- * Payment Type:** A dropdown menu with "Electronic Funds Transfer (EFT)" selected.
- * Routing Number:** An empty text input field.
- Get Bank Details:** A green button with white text.
- Bank Name:** An empty text input field.
- Bank Address:** An empty text input field.
- Payee Name:** An empty text input field.
- Payee Address:** An empty text input field.
- * Account Type:** A dropdown menu with "Select One" selected.
- * Status:** A dropdown menu with "Pending" selected.
- * Account Number:** An empty text input field.
- * Re-Type Account Number:** An empty text input field.

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".

* Payment Type
Electronic Funds Transfer (EFT) ▼

* Routing Number
[Text Field] [Get Bank Details](#)

Bank Name: [Text Field] Bank Address: [Text Field]

Payee Name: [Text Field] Payee Address: [Text Field]

* Account Type: Select One ▼ * Status: Pending ▼

* Account Number: [Text Field] * Re-Type Account Number: [Text Field]

* Effective Date: MM/DD/YYYY [Calendar Icon] End Date: MM/DD/YYYY [Calendar Icon]

[Add To Grid](#)

[Exit](#) [Back](#) [Save & Next](#)

- A Bank letter or voided check must be uploaded on the 8.0 Document Upload Screen for payment information to be processed.
- 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.

Note: 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.

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".

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.

* Payment Type
Check

Provider Name

* Status
Active

Address:

* Effective Date End Date
MM/DD/YYYY MM/DD/YYYY

Add To Grid

Exit Back Save & Next

4. When changing payment methods, users will need to perform Maintenance to end date the current record and add a new record. The current record must be end dated with today's date. The new record will have an effective start date of tomorrow's date.