

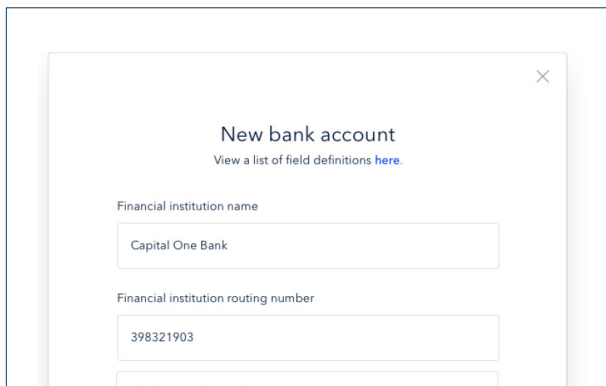
# How to: Set up and edit ACH / EFT Payments

Select the “Manage Payments” option on the right side menu in the portal to set up electronic payments. From this page you can do the following:

- 1 Add + Verify Bank Account
- 2 Create + Link ACH Enrollment
- 3 Add ERA to ACH Enrollment

## Adding a new bank account

Once the user clicks “Add new bank account”, they must complete all fields to add the new account. We require the user to verify their routing number and account number to ensure accuracy.

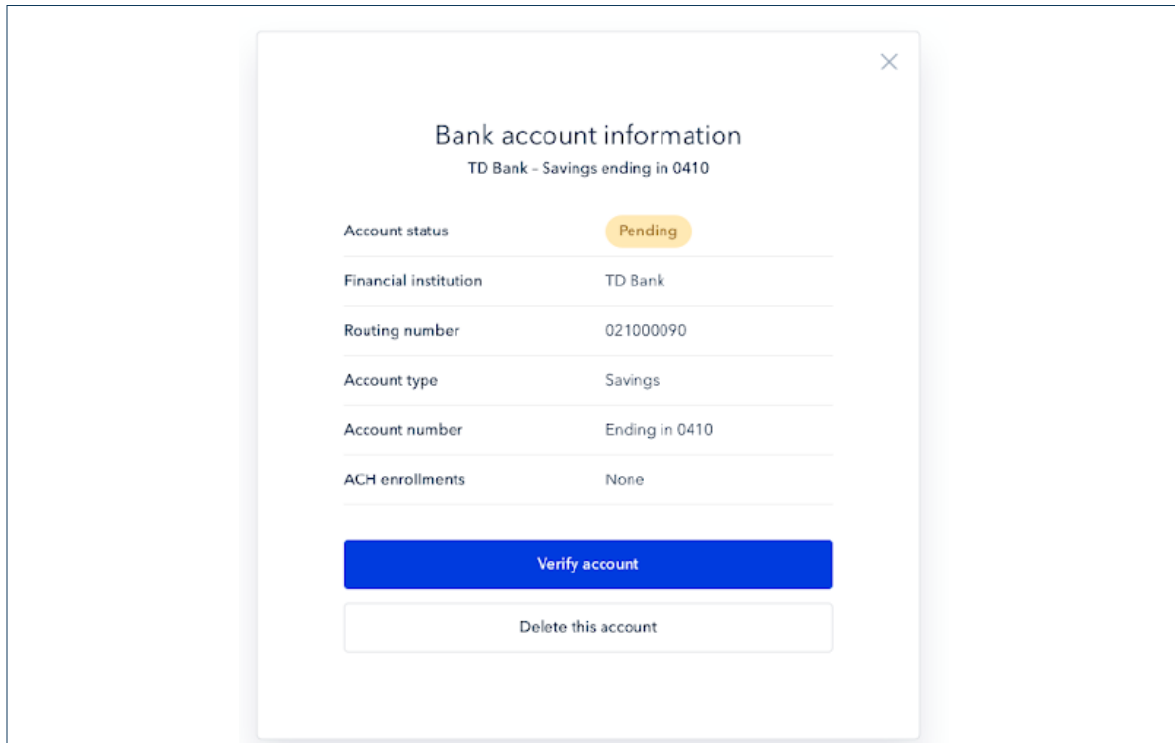


The screenshot shows a modal window titled "New bank account" with a close button (X) in the top right corner. Below the title is a link that says "View a list of field definitions [here](#)." There are two input fields: "Financial institution name" with the text "Capital One Bank" and "Financial institution routing number" with the text "398321903".

Once the user adds the bank account, they will receive two small deposits to that bank account within 3-5 business days. The user must come back to the bank account to verify these deposits and proceed with an ACH enrollment.

## Bank account information (Pending)

When the user clicks on an existing bank account, they will see bank account information. If the microdeposits (small \$ amount) have not been entered, then the status will be pending. The user must click "Verify Account" to enter the deposit amounts. The user can also delete the bank account.



A screenshot of a web application modal titled "Bank account information" with a close button (X) in the top right corner. Below the title, it says "TD Bank - Savings ending in 0410". The modal contains a table with the following information:

Account status	Pending
Financial institution	TD Bank
Routing number	021000090
Account type	Savings
Account number	Ending in 0410
ACH enrollments	None

Below the table are two buttons: a blue "Verify account" button and a white "Delete this account" button with a grey border.

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## Bank account verification (microdeposits)

The user must enter the two deposit amounts to confirm the bank account and proceed with ACH enrollment.

The user will see a success message once the small deposits are entered correctly and they click "Confirm account".

## ACH Enrollment Form

### Step 1: About the provider - New

In the ACH enrollment form, the user must provide basic details about the provider, hospital system, or entity that is enrolling.


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To edit an ACH enrollment: When editing “about the provider”, the user can only make updates to “provider contact information”. If the user is looking to cancel their enrollment, they must proceed to “Step 3: Submission Information”.

## Step 2: Financial institution information - New

In the ACH enrollment form, the user must select a bank account to receive ACH payments (bank accounts are added on the Manage Payments page) and determine whether they would like payments to be grouped by TIN or NPI. If the user picks NPI, they must provide Billing NPIs. If the user picked TIN, the TIN entered in Step 1 will be pre-populated in the list. Users can only add TINs and NPIs affiliated with their portal organization.

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 Provider

### Financial information

View a list of field definitions [here](#).

Financial institution information

Adding a new bank account?

Select a bank account

Lisa (checking ending in 0000)

▼

Financial institution name	Lisa
Financial institution routing number	110000000
Type of account at financial institution	Checking
Provider's account number with financial institution	Ending in 0000

[Account number linkage to provider identifier](#)

**To Edit:** When editing “financial information”, the user can make updates to the bank account that will receive ACH payments and add more TINs or NPIs to the “account number linkage to provider identifier” section. Note: If the user would like to change their payment groupings from TIN to NPI (or vice versa) they must cancel the enrollment and start a new one. There is no way to change this grouping while editing an enrollment. If the user is looking to cancel their enrollment, they must proceed to “Step 3: Submission Information”.

### Step 3: Submission information - New

In the ACH enrollment form, the user must note the reason for form submission and provide an electronic signature. These are fields required by CAQH.

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The screenshot shows a web browser window with the title 'Oscar - Providers' and the URL 'hioscar.com/providers'. The page header includes the Oscar logo and the word 'Provider'. The main heading is 'Submission information', followed by a link to 'View a list of field definitions here.' The form contains two sections: 'Reason for submission' with three radio button options ('New enrollment' is selected), and 'Authorized signature' with a text input field labeled 'Printed name of person submitting enrollment'.

Oscar | Provider

## Submission information

View a list of field definitions [here](#).

**Reason for submission**

☒ New enrollment

☐ Change enrollment

☐ Cancel enrollment

**Authorized signature**

Printed name of person submitting enrollment

**To Edit:** When editing “submission information”, the user can choose to “change enrollment” or “cancel enrollment”. The user must also provide an updated signature to authorize the changes to the enrollment.

Once complete, you can access account information and payment settings using the “Manage Payments” option on the right side menu.