Financial Executor Portal Troubleshooting

The following information is intended to assist ACHs in troubleshooting issues with partnering provider registration and information in the Financial Executor (FE) Portal.

Partnering Provider Status Reports

ACHs can pull a Provider Status report in the Portal to pinpoint where partnering providers are in the registration process. The Provider Status report can be accessed in the **Provider Reports** option under the **Reports tab** in the Portal. The Portal has nine different identifiers that a partnering provider may be associated with. Definitions for these identifiers are provided below, as well as ACH action items associated with each status.

EIN Not Verified. The ACH has added the provider to the portal, and the name and/or EIN does not match IRS records.

> ACH action item: PCG will notify the ACH if there are issues with verifying the provider's name and/or EIN. PCG work with the ACH and partnering provider to validate the correct name and/or EIN.

EIN Validation in Process. The ACH has added the provider to the portal, and PCG is currently in the process to validate the provider's EIN.

> ACH action item: EIN match may take up to 24 hours, and may not be updated in the portal for 1-2 business days. Once the provider EIN is validated, the invitation email will be sent to the provider. The ACH should monitor this process.

Invitation Sent. The ACH as added the provider to the portal and sent the initial invitation email to the provider through the portal. The provider may not have received the invitation email, or received the email and have not completed the registration process.

> ACH action item: The ACH should pull a User Level report in the Portal to confirm if a provider has ever logged into the portal (see instructions below). If the partnering provider has not received the invitation email, the ACH may reach out to the provider directly and provide instructions on how to register without the email (see instructions below).

Invitation Accepted. The partnering provider received the invitation email, completed the registration process, executed the Master Services Agreement and accepted the ACH's invitation.

> ACH action item: The ACH must now approve the partnering provider in the portal. Instructions can be found on page 13 in the ACH User Guide: Adding and Approving Partnering Providers.

Invitation Declined. The partnering provider received the invitation email and completed the registration process, but did not execute the Master Services Agreement or accept the ACH's invitation in the portal.

> ACH action item: The ACH should follow up with the partnering provider to confirm that the provider intentionally declined the invitation. If the partnering provider declined the invitation in

error, the ACH should reach out to PCG. PCG has the ability to reset the invitation status in the portal, so that the provider may accept the invitation.

Active. The partnering provider has completed all steps in the registration process, including accepting the ACH's invitation, and the ACH has approved the provider. The ACH may now distribute payments to the provider in the portal.

<u>ACH action item:</u> The ACH may make payments to the partnering provider. Instructions for partnering provider payments can be found in the ACH User Guide: Partnering Provider Payments.

Inactive. The ACH has designated an active partnering provider as inactive, indicating that the provider is no longer associated with ACH projects.

<u>ACH action item:</u> If this designation was made in error, the ACH may change the status in the portal in the **User Management** section under the **Admin tab**. After the ACH finds the particular provider, selecting the **pencil icon** will prompt an **Edit User** box to appear, in which the ACH can change the active status.

ACH Denied. The partnering provider has completed all steps in the registration process, including accepting the ACH's invitation, and the ACH has denied the provider.

<u>ACH action item:</u> If denying the partnering provider is in error, the ACH should reach out to PCG. PCG has the ability to reset the approval status in the portal, so that the ACH may approve the provider.

ACH Declined Agreement. The partnering provider has completed all steps in the registration process, including accepting the ACH's invitation, and the ACH has approved the provider but did not execute the Master Services Agreement.

<u>ACH action item:</u> If declining the Master Services Agreement is in error, the ACH should reach out to PCG. PCG has the ability to reset the agreement status in the portal, so that the ACH may execute the agreement.

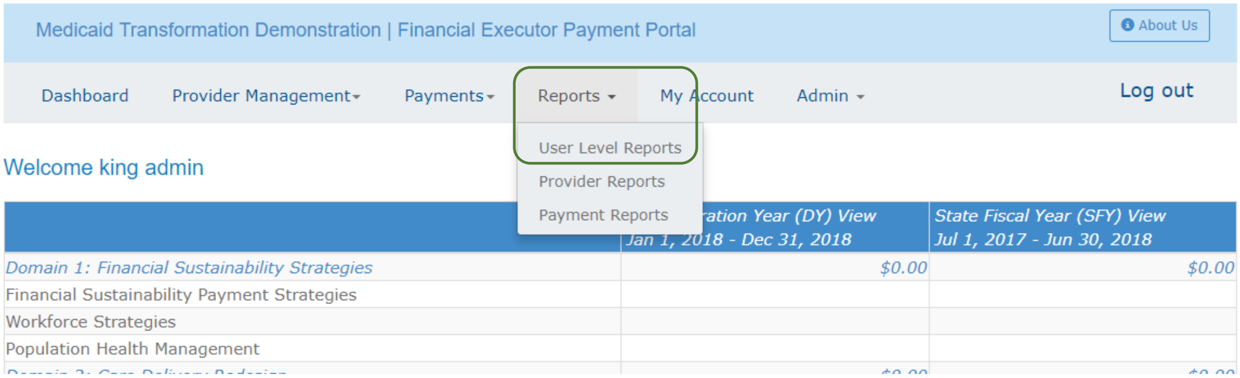
Troubleshooting instructions

Below are some instructions for troubleshooting problems recently identified in the FE Portal, including: 1) pulling User Level reports to identify if providers have accessed the portal, 2) alternative registration method for partnering providers, 3) how to update incorrect bank information, and 4) how to update a partnering provider administrative role.

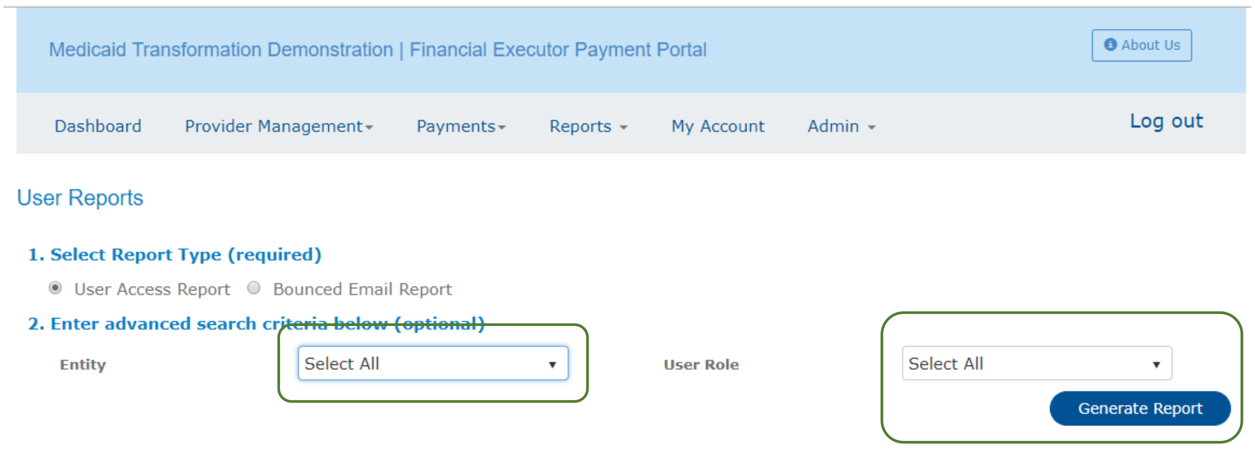
User Level reports

User Level reports allow the ACH to see the last time the portal was accessed by partnering providers and users. To do so, the ACH should follow the instructions below. Please note: the screen shots below represent a mock ACH account.

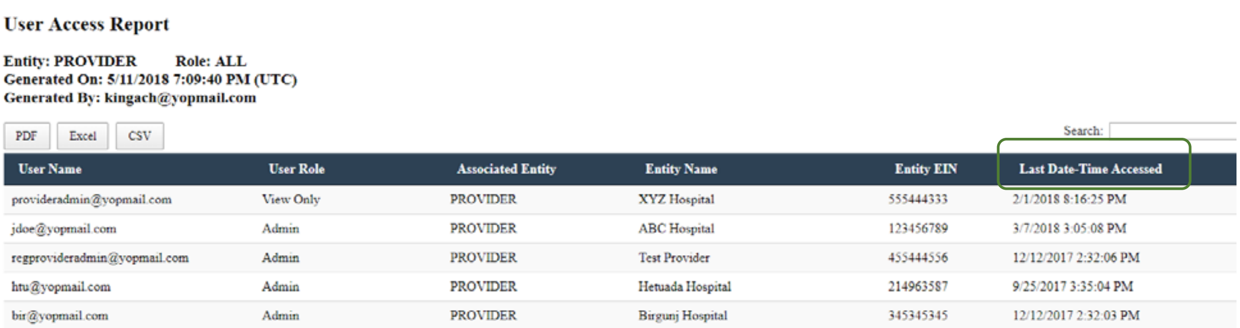
- Log in to: https://wafinancialexecutor.com/
- Select the **Reports** tab, then the **User Level Reports** option



- Filter the report by selecting **provider** in the entity criteria, and **select all** in the user role criteria
- Select **generate report**



- The **Last Date-Time Accessed** column will show when a provider has last accessed the portal. If a provider appears on this report, it means they have at least been able to access the portal. If a provider does not appear in this report, it means they have not yet registered.



User Access Report

Entity: PROVIDER **Role: ALL**
Generated On: 5/11/2018 7:09:40 PM (UTC)
Generated By: kingach@yopmail.com

PDF Excel CSV Search:

User Name	User Role	Associated Entity	Entity Name	Entity EIN	Last Date-Time Accessed
provideradmin@yopmail.com	View Only	PROVIDER	XYZ Hospital	555444333	2/1/2018 8:16:25 PM
jdoe@yopmail.com	Admin	PROVIDER	ABC Hospital	123456789	3/7/2018 3:05:08 PM
regprovideradmin@yopmail.com	Admin	PROVIDER	Test Provider	455444556	12/12/2017 2:32:06 PM
htu@yopmail.com	Admin	PROVIDER	Hetuada Hospital	214963587	9/25/2017 3:35:04 PM
bir@yopmail.com	Admin	PROVIDER	Birgunj Hospital	345345345	12/12/2017 2:32:03 PM

Alternative registration for partnering providers

Should a provider fail to receive the FE Portal invitation email (due to spam filtering, email address error, etc.) the ACH may send the following instructions to partnering providers to register in the portal. Please note, this method will only work if this is the contact the ACH provided upon uploading this provider into the portal:

- Go to: https://wafinancialexecutor.com/
- Select the **Register Provider** tab
- Enter in **your** email address and your entity's **EIN**
- Select **Next**
- A confirmation code should be sent to your email address
- Type that confirmation code into the box and select **Submit**
- Now you will be brought to **set password**
- Now you will be brought back to the login page
- On the **login** tab enter in your email address and the password you just sent

How to update incorrect bank information

The following instructions should be followed if the partnering provider successfully registers in the FE Portal, an ACH attempted to distribute payment, and the payment failed due to incorrect bank account information. The ACH may send these instructions to partnering providers:

- Login at https://wafinancialexecutor.com/
- Select the **My Account** tab
- Go to the third tab over **Payment Information**
- Select **Add Bank Account**
- Fill in the **Add Account** box will all appropriate banking information-please be sure to review for accuracy
- Once it is all filled in select **Update**
- Now that a new bank account has been added, select **Delete** from the invalid bank account
- A **Delete Confirmation** pop-up will appear asking if you **Are sure you want to delete this bank account?** Select **Yes** (You can select no, but if data is invalid it may be best to remove entirely, that decision is up to you)
- This bank account should now appear on your **Payment Information** tab
- To ensure this updated bank account is the one in use, now go to the **ACH Specific Details** Tab
- You should see the name of the ACH that you are updating the bank account for, if there is a plus sign next to this, select the **plus sign** to see more information
- The first option should be **payment information**
- Double check the last four digits are what you entered, if you wish to switch to another account on file select **change account**
- A **select bank** dropdown will appear, choose which bank you would like and select **save**

How to update a partnering provider administrative role

In the event that a partnering provider's administrative role must be updated (e.g. the individual no longer works for the partnering provider), the ACH may follow the instructions below to make this change. This is a decision that should be made and agreed upon between the ACH and partnering provider, and it will not be reflected in the contact information area of the Portal. The ACH should reach out to PCG to confirm if they would like the contact information updated as well. Please note, if the ACH updates an admin user before registration has taken place, the provider will be sent an email asking them to set a password, and the registration process will take place from there.

- Login at https://wafinancialexecutor.com/
- Select the **Admin tab** and the **User Management** option
- On the **User Type** filter to show **Provider**
- Either by scrolling or searching find the entity of the provider admin you would like to update

- Change the current admin to **view only**
    - To do this select the **pencil icon** on the left hand side
    - From the **user role** dropdown select **provider view only**
    - Select **Update**
- Now select **Add User** to add a new admin
- Fill out the **Add User** box and be sure to select **Provider Admin** as the user role
- Make sure all information is filled in and you select **active** to make them an active provider
- Select **Update**
- You have now added a new admin user

Contact

For questions, please feel free to reach out to Public Consulting Group, Inc., via email or phone.

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