Changing Broker Demographic and Banking Details

For the Broker Portal

Quick Reference Guide

Description

The steps below guide brokers on how to change their demographic and banking details.

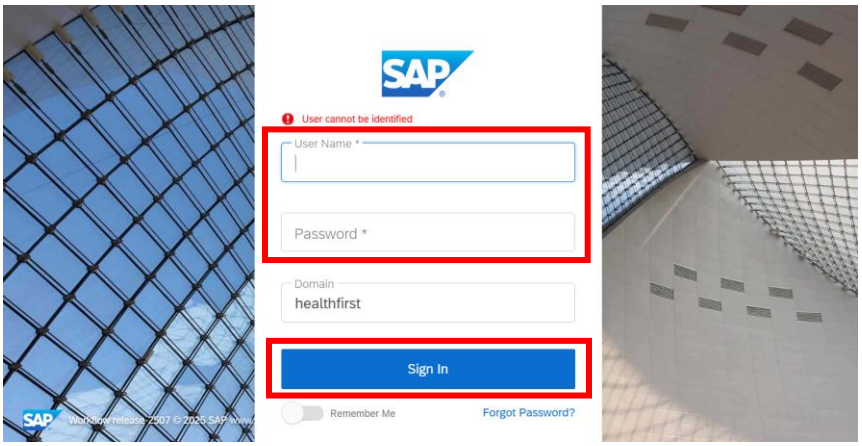
When should I use this QRG?

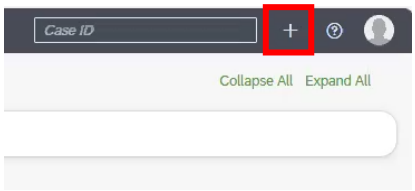
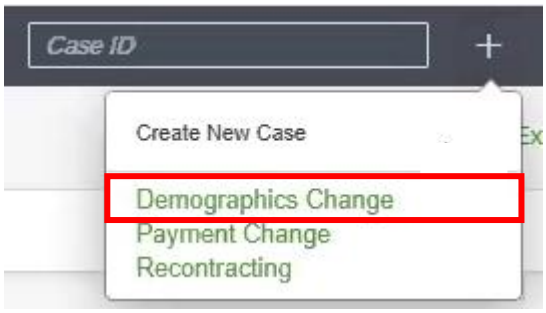
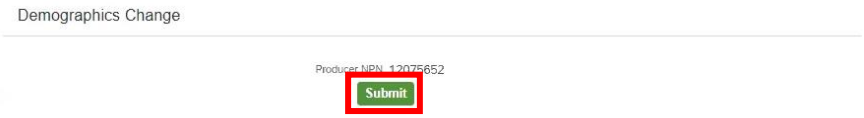
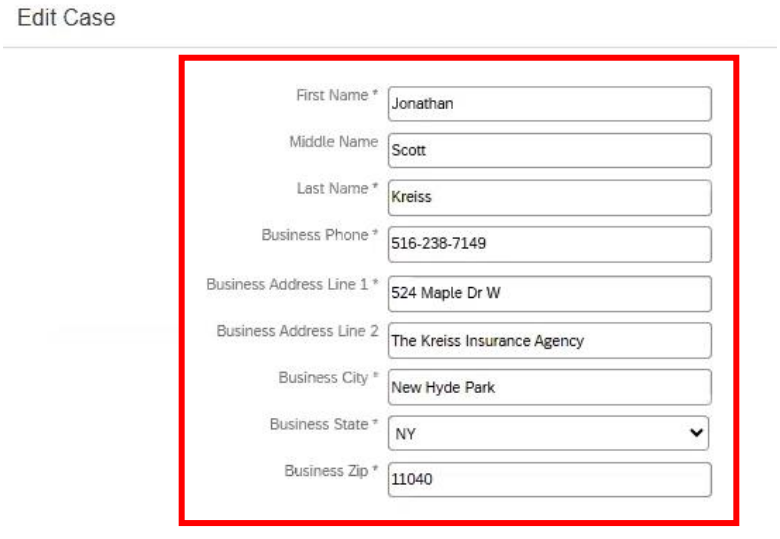
Brokers should use this guide when they need to make change to their demographics (name or address) or banking details (change bank account information or payment method).

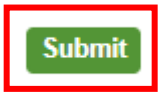
User Groups: Brokers

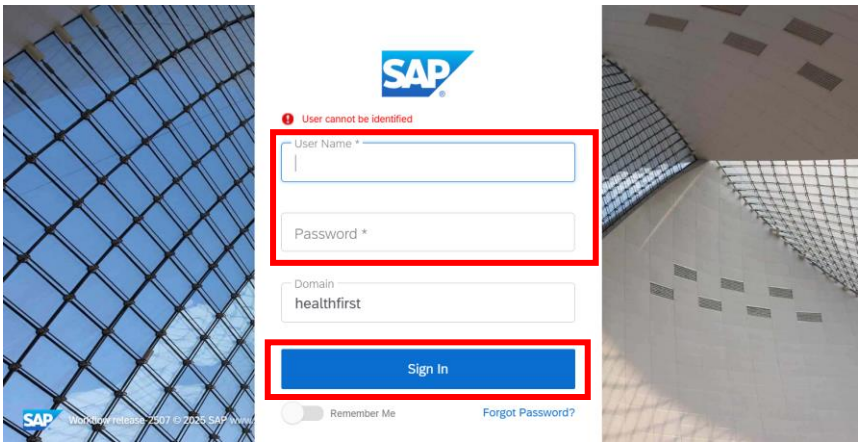
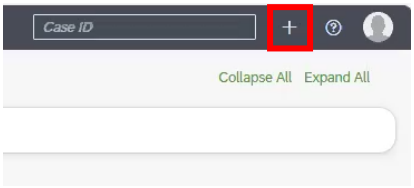
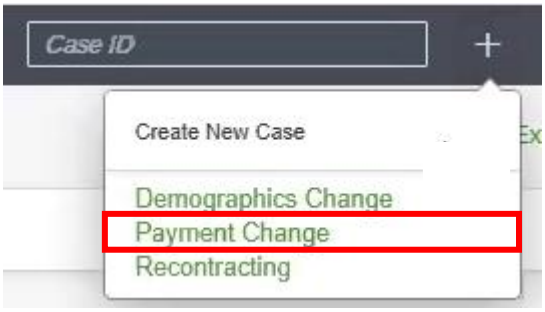
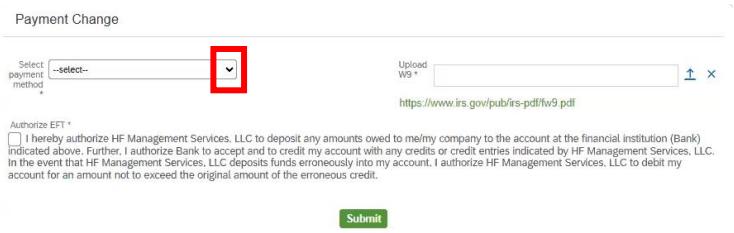
Use the quick links below to complete each task:

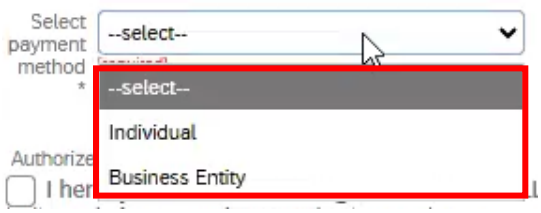
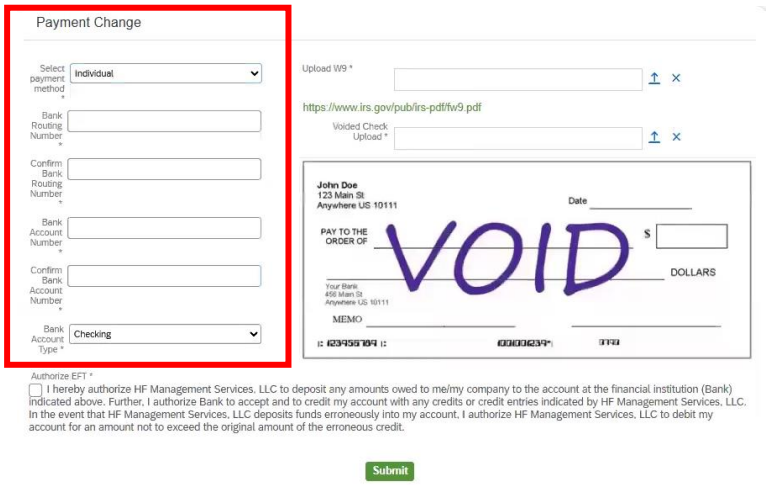
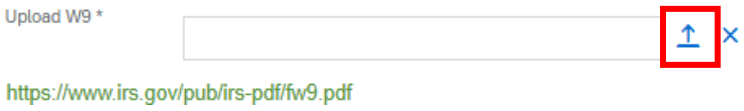
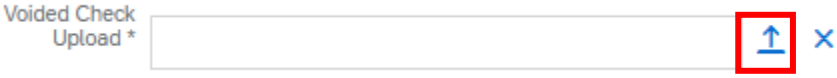
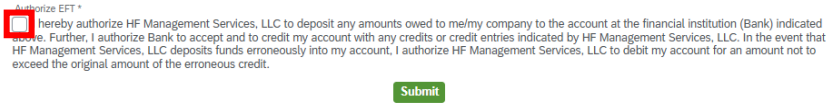
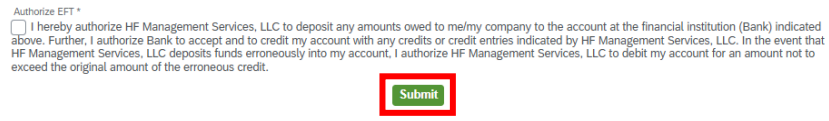
[Change Broker Demographic Details]
[Change Broker Banking Details]

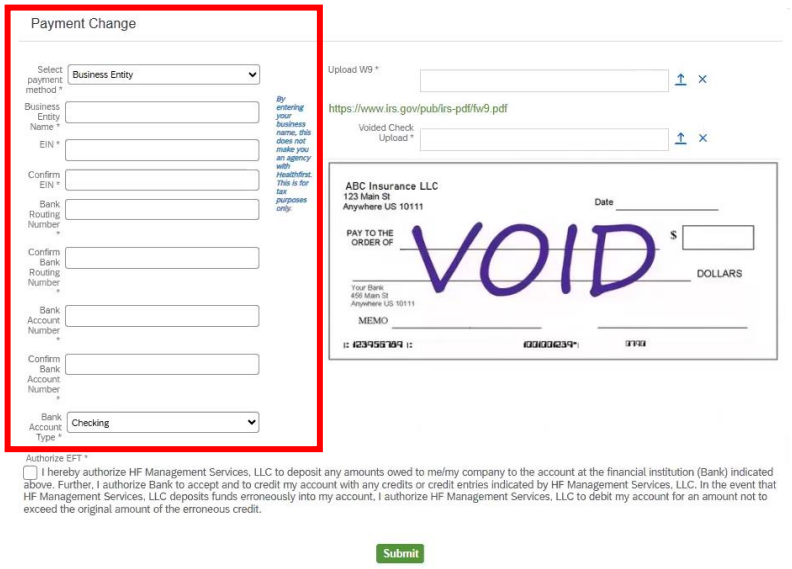
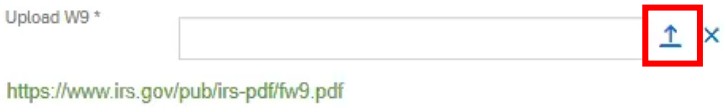
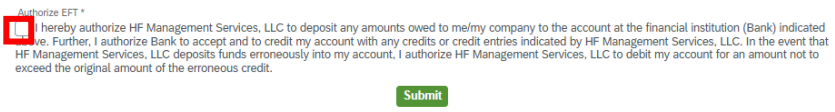
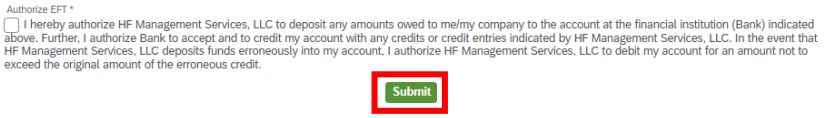
Step	Action	Screen Reference
	Changing Broker Demographic Details	
1	To begin, use the link below to log in to the application. Workflow » Login Page • Enter your **Username** • Enter your **Password** • Click the **Sign In button**	

2	When the application opens, click the **+ Plus Sign** in the upper right corner.	
3	From the drop-down, click **Demographics Change**.	
4	When the new window opens to display your Producer NPN number, click **Submit**.	
5	All your demographic information will appear on this screen. You can edit all fields, including: • Name • Business Phone • Address To make an edit, click inside any field and enter the new information.	

6	**Note:** If you are making a name change, an additional required field will appear on the screen asking you to upload a copy of your W-9. Click the **up arrow** to upload the W-9.	
7	Once you complete the required information, click **Submit**.	
8	Updated demographic information will appear on the confirmation screen. Verify all changes were captured. **Note:** If you don't see changes made, please repeat the steps and ensure that you click 'submit' at the end.	
Process Complete		

Changing Broker Banking Details		
Step	**Action**	**Screen Reference**
1	To begin, use the link below to log in to the application. Workflow » Login Page • Enter your **Username** • Enter your **Password** • Click the **Sign In button**	
2	When the application opens, click the **+ Plus Sign** in the upper right corner.	
3	From the drop-down, click **Payment Change**.	
4	At *Select Payment Method*, click the **down arrow**.	

5	From the drop-down **select Individual or Business Entity**. **Note:** This selection will determine if you will be paid as an Individual or Business Entity.	
6	If you select 'Individual' as your payment method, the system will show relevant fields for you to populate. These will include: • Bank Routing Number • Bank Account Number • Bank Account Type **Enter the new banking** details into the fields.	
6a	Click the **up arrow** to upload the W-9.	
6b	Click the **up arrow** to upload a voided check.	
6c	At *Authorize EFT*, **click the box** to authorize Healthfirst to credit the new account.	
6d	Then click **Submit**. A confirmation screen showing the new payment details will appear.	

7	If you select 'Business Entity' as your payment method, the system will show relevant fields for you to populate. These will include: • Business Entity Name • EIN • Bank Routing Number • Bank Account Number • Bank Account Type **Enter the new banking** details into the fields.	
7a	Click the **up arrow** to upload the W-9.	
7b	Click the **up arrow** to upload a voided check.	
7c	At *Authorize EFT*, **click the box** to authorize Healthfirst to credit the new account.	
7d	Then click **Submit**. A confirmation screen showing the new payment details will appear.	
Process Complete		

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