How to Add Resident EFT Account Information

1. Go To: e-Financial > Resident Process

2. Pick or Search a resident from the list and click on **Billing** tab

3. Scroll down to '**Pre-Authorized Information**'

Bank Name	Transit #	Account Number	Name on Account	Start Date	End Date
			No Records Available		

4. Click on '**New EFT Information**' in order to add resident EFT account information
- Check the '**Process by EFT**' option to make the account active
- Add the Institution Number **using the Search glass.** You can search the institution by name or number.
- Type in the '**Transit number'**, the '**Account Number'**, and '**Name of Account'** (resident last name, first name)
- Select '**Maximum Payment'** from the drop down, usually '**Balance Owing**' unless specified by the client.
- Select '**Withdrawal Start Date'** from the calendar
- Click on '**Save'**

5. To pick another resident to add EFT information, click on '**Change Resident**' which will take you to the Active resident list. Once you select another resident the page will display to the Billing tab of the selected resident.