

How to Add Resident EFT Account Information

1. Go To: e-Financial > Resident Process

Home e-ADT e-Assessments e-Plan e-Notes e-MAR **e-Financials** POC Wound Tracker e-Reports Settings My Account Admin -- Quick Entry --

Information Post **Resident Process** Billing Process Trust Process Facility Setup

Resident Identification Billing Trust Statement

Client List

Find Client

Selection Filter: **Active Client**

Search By: Name

Find Clear Cancel

Full Name	Chart Number	Accommodation Code	Accommodation Rate	Resident Amount	GL Account
Adams, Robert	C92	P	2255.09	1980.09	1200-A/R Billings - Residents
Anderson, William	C89	B	1707.59	1707.59	1200-A/R Billings - Residents
Bratt, Brandon	C82	P	2255.09	1980.09	1200-A/R Billings - Residents
Brown, James	C83	SP	1950.93	1950.93	1200-A/R Billings - Residents
Bryan, Sara	C91	B	1707.59	1707.59	1200-A/R Billings - Residents
CAMERON, JAMES	C4	SP	1950.93	1950.93	1200-A/R Billings - Residents
Charlee, Allen	C87	SP	1950.93	1950.93	1200-A/R Billings - Residents
Fast, Learn	C86	B	1707.59	1529.59	1200-A/R Billings - Residents

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

Information Post **Resident Process** Billing Process Trust Process Facility Setup

Resident Identification **Billing** Trust Statement

Manage Client Charges

Profile



Name Learn Fast

Chart Number C86

Gender Male

Date of Birth 1929-10-01

Date of Admission 2012-09-01 10:40:00 AM

Edit / Update

3. Scroll down to 'Pre-Authorized Information'

Pre-Authorized Payment Information

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

New EFT Information

- 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 Owning' unless specified by the client.
 - Select 'Withdrawal Start Date' from the calendar
 - Click on 'Save'

PreAuthorized Payment Information -- Webpage Dialog

http://train.mede-care.ca/eCareIV//RBT/ResidentProcesses/RBTControlLoader.aspx?winTitle=winTitlewFRBTPAPInformation&controlPath=/eCareIV//RBT/ResidentSetting/RBTResidentEFTInformation.asx

PreAuthorized Payment

Process by EFT

Institution Number 849 - Brunswick Credit Union Federation Limit

Transit Number #####

Account Number #####

Name on Account resident last, first name

Maximum Payment [dropdown] plus 0.00

Withdrawal Start Date 2013-11-01

Withdrawal Stop Date

Notes

Save Cancel

http://train.mede-care.ca/eCareIV//RBT/ResidentProcesses/RBTControlLoader.aspx?winTitle=winTitlewFRBTPAPInformation&controlPath Internet

- 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.

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Change Resident