

Webform User Guide

VA Financial Account Creation (Vendor File Request) For Direct Deposit/EFT Enrollment available through VAs Customer Engagement Portal

Introduction

A web version of VA's legacy VA Form 10091, VA-FSC Vendor File Request Form is now available to all vendors to include medical providers, caregivers, individuals, and Veterans. *

Anyone who needs to add themselves to the VA financial system to receive a payment or benefit must complete the vendor file form. The same goes for vendors who need to update their existing record with the VA financial system.

This User Guide walks you through the web vendor request form. Prior to starting, please have your bank's name, your account number, and your routing number readily available, and if you are updating a previous enrollment, please have your previous bank's name, account number, and routing number readily available as well. You also <u>need access to an active email address</u> with both options.

What's In This User Guide

With this guide you will find a visual walkthrough of the steps you need to complete the process.

As you navigate this Guide, you may see green boxes _____ on the images. These were used to draw your attention to where the instructions are referring to on the screen or document.

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*Note: Instead of using the CEP webform, the VA employees (with a VA.gov email handle) must use the Customer Resolution Management, VA Employee Self Service portal to update their account.

Welcome to the VA Customer Engagement Portal (CEP)

After logging in through **ID.me**, the **Customer Engagement Portal** home page will appear. On the home page, locate the **"VA FSC Vendor File Form**" button.

Things you will need to get started: Your current banking information where you want your payments to go to, and if this is an update to a previous enrollment, you will need your previous banking information. Again, since you must complete the form in one sitting, we strongly recommend having your banking information (i.e. – name, account number, routing number) readily available prior to starting.

Time to complete: Completing the webform should take 5 to 20 minutes. Once you start your form, you cannot save your progress or information to go back to later.

1. After reading the Authorized Use Only, click "I Agree".

A	of Veterans Affairs
4	Authorized Use Only
VA sy expli- throu reaso unde moni perso	stems are intended to be used by authorized VA network users for viewing and retrieving information only; except as otherwise citly authorized for official business and limited personal use under VA policy. Information from this system resides on and transmits igh computer systems and networks funded by the VA. All access or use constitutes understanding and acceptance that there is no onable expectation of privacy in the use of Government networks or systems. All access or use of this system constitutes user rstanding and acceptance of these terms and constitutes unconditional consent to review and action including (but not limited to) toring; recording; copying; auditing; inspecting; investigating; restricting access; blocking; tracking; disclosing to authorized onnel; or any other authorized actions by all authorized VA and law enforcement personnel. Unauthorized user attempts or acts to
•	Access; upload; download; change; or delete information on this system
	Deny access to this system
	Accrue resources for unauthorized use
•	Otherwise misuse this system are strictly prohibited
Such	attempts or acts are subject to action that may result in criminal, civil, or administrative penalties.
I Ag	ree

2. Click the VA FSC Vendor File Form button. (Note: Do not click on the Register button as it is not required to complete the web form.)



The **Customer Engagement Portal** Vendor File Form has 5 specific sections – **Tax ID Information**, **Payee Information**, **Address/Bank Information**, **Add Authorized Representative Contact/s**, and **Review**. To track your progress, the form highlights the stage you are in with a visual reference at the top of the screen. You may go back to any previous section at any time by selecting the section name; however, you can only progress through the form as you complete each of the sections.



Section 1 – TAX ID Information

1. Enter your **TAX ID** or **Social Security Number** (both are 9-digit numbers) and then re-enter it again in the free text fields. (Note: Click on the "eyeball" in the free text field if you need to review what you entered.)

VA U.S. Department of Veterans Affairs	Customer Engagement Portal	<user's name=""></user's>
🔒 Home 🗸	endor File Form	8
General Info	1 2 3 4	5
@ Contact Us	TAX ID Information Payee Information Address/Bank Information Add Authorized Represent	tative Contact/s Review
	Welcome <user's name="">, To get started, please enter your 9-Digit legal identification number registered with the IRS for the acco in the VA's Financial System in the fields below. Tax Identification Number/Social Security Number *</user's>	unt you need to Add or Update
	Re-enter TAX ID/SSN * Request Type * New (if you are a new vendor, First time registering in the Financial System or Adding a new location Update (if you are an existing vendor, updating an existing file in the Financial System, Select Updat Is the account that you are adding or updating registered with SAM.gov? * Yes No Next>	n, Select New) e)

- Select the appropriate Request Type either New or Update. Unless you already have an active VA vendor record (completed this process previously either online or through the pdf VA Form 10091 form), select New. If in doubt, select New.
- For the question "Is the account that you are adding or updating registered with SAM.gov", unless you are a SAM.gov vendor, select No. If in doubt, select No. If you are a SAM.gov vendor select Yes and then add your UEI (and EFT indicator) in the appropriate fields.
- 4. Click Next.

Tax Identification Num	ber/Social Security Number *
Re-enter TAX ID/SSN *	
Request Type * New (If you are a new Update (If you are ar	vendor, First time registering in the Financial System or Adding a new location, Select New) existing vendor, updating an existing file in the Financial System, Select Update)
Is the account that you O Yes No	are adding or updating registered with SAM.gov? 🕜 \star
UEI ⑦ Alphanumeric. Ex: 1234	567890AB
	Next >>



Section 2 – Payee Information

- 1. Pull down on the **Payee Type** drop down menu and select the most appropriate Payee Type for you.
 - a. Medical Provider: A commercial vendor who has an NPI and generally submits a medical claim for goods or services provided.
 - b. Utility: A commercial vendor who provide utility type services.
 - c. Individual: A non-commercial vendor that is not a caregiver or Veteran.
 - d. Foreign: All commercial vendor not of US-origin.
 - e. Commercial/ALAC: All commercial vendors not covered by a more specific vendor type in this list of Payee Types. Also, select this Payee Type if you are a VA Administrative and Loan Accounting Center (ALAC) vendor.
 - f. Caregiver: An individual who provides care to Veteran and may or may not have an NPI.
 - g. Veteran: An former member of the United States Uniformed Services.
 - h. Vocational Rehabilitation and Employment (VR&E): Commercial Vendors who are specific to VA's VR&E program.

Vendor File Form	O ^
1 2 3 4 TAX ID Information Payee Information Address/Bank Information Add Authorized Representative	Contact/s Review
Payee/Vendor Information	Payee Type ⑦ * Select
Pavee Type ⑦ * Select Payee/Vendor Name ⑦ * DBA ⑦	Select Medical Provider Utility Individual Foreign Commercial/ALAC Caregiver Veteran Vocational Rehabilitation & Employment (VR&E)
<< Back Next >>	·

- 2. After selecting the **Payee Type**, enter your legal first and last name or legal business name at it is on file with the IRS in the **Payee/Vendor Name** field.
- 3. If you have a Doing Business As name, enter it into the **DBA** field.
- 4. If you have a National Provider Identifier (**NPI**) in the **NPI** field *if you have one*. If in doubt, leave it blank.
- 5. Click Next.

Payee Type 🕜 \star		
Caregiver	\checkmark	
Note: Individual care givers to provide their legal instead of Company name.	name	
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Pavee/Vendor Name ⑦ * <your -="" caregiver="" name="" not="" the="" veteran=""></your>	DBA (7	
Pavee/Vendor Name ⑦ * <your -="" caregiver="" name="" not="" the="" veteran=""> NPI ⑦</your>		



Section 3 – Address/Bank Information

- 1. Enter your **Current Payee Mailing Address** by completing the Address, City State and Zip code fields. (Though VA does not intend to send you mail because of this process, VA may. VA may use this address to verify your identity.)
- 2. Scroll down to enter your banking information.
- 3. Enter your Bank Routing Number. This will auto-populate the Bank Name field.
- 4. If the **Bank Name** is incorrect, edit as needed; however, if correct, skip any edits.
- Enter your Bank Account Number*. To ensure accuracy, Re-Enter your Account Number. (If using a paper check for reference, do not include the check number as part of the Account Number.)
- 6. Select the appropriate **Account** Type. If in doubt, select **Checking**.
- 7. The **Notes** field is optional. Add notes as needed or leave blank.

123 Sesame Street						
Audi ess Lifle 2						
City *	State *	Zip *	_			
INPW ILLE		11104				
INEW TOTA						
NEW TOIN						
New TOTK						
Current Payee I	Bank Informati	on				
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Current Payee I Routing Number + 043000096 Account Number + <no #="" check=""></no>	Bank Informati Ba Pr Po To	on nk Name * NC BANK NATIONAL	L ASSOCIATION	1		

8. Click Next.

Section 4 – Add Authorized Representative Contact/s Note: Adding an Authorized Representative is OPTIONAL!



As the form indicates, an **Authorized Representative** is a person you are authorizing to represent you and once designated is authorized to change your vendor file information that is stored in VA's financial system (aka, your vendor file) to include your banking and address information. Please note, this does not authorize this individual(s) to update any other VA records with VHA, VBA, NCA or any other staff offices.

- The top portion of this form will auto-populate with the First Name, Last Name, Email Address and Phone Number you shared with ID.me as you are automatically designated as your own Authorized Representative. (Note: If your email is incorrect, you must go to ID.me to correct it.)
- 2. Add your Official Title (i.e., Mr., Ms., Mrs., or Dr.).
- 3. If <u>you do not have</u> an **Authorized Representative**, click **Next** and you will be taken to the next section of the process and may skip the rest of the instruction in this area.

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X ID Information	Payee Information	Address/Bank Information	Add Authorized Representative Contact/s	Review	
Authorized Rep	resentative Contac	ct Information			
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erson aumorized to	Change banking or and	ress information on your benait.			
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First Name*		Last Name *			
First Name *		Last Name *			
First Name * First Official Title *		Last Name * Last Email Address *			
First Name* First Official Title* Mr.		Last Name * Last Email Address *			
First Name* First Official Title* Mr. Phone Numbe	;r*	Last Name *			
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First Name * First Official Title * Mr. Phone Numbe 5129113111	er★ 1	Last Name * Last Email Address * Fax Number			
First Name * First Official Title * Mr. Phone Numbe 5129113111	r*	Last Name * Last Email Address * Fax Number			
First Name * First Official Title * Mr. Phone Numbe 5129113111	sr*	Last Name * Last Email Address * Fax Number			

- 4. If *you do have* an **Authorized Representative**, click the **+Add Additional Contact**.
- 5. Enter your Authorized Representative's information in the required fields (First Name, Last Name, Official Title (i.e. Mr., Ms., Dr.), Email Address, and Phone Number) for your designated Authorized Representative.
- 6. Repeat this process for every **Authorized Representative** you want to designate.
- 7. Click **Next** when done.

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Fire	st Name*	Last Name *		
Off	ficial Title *			
Ph	one Number*	Fax Number		
]	
📥 Add Add	ditional Contact			
Notes				
Enter any No	otes/Comments			
		<< Back Next >>		



Section 5 – Review

All the information entered in the previous 4 sections will carry over to this **Review** section and should be reviewed for accuracy/correctness (typos) prior to submission.

- 1. To Review the information in a Specific section, click the carrot or Section name to be reviewed. This will expand the data captured in this Section.
- 2. If any of the information is incorrect, go back to the appropriate section by clicking on the Section heading at the top (form progress numbers) or click the **Back** button.
- 3. If the information entered is accurate/correct, review the certification statement at the bottom of the page. If you agree to the statement, select the checkbox next to the statement.

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1	2	3	4	- 5
AX ID Information	Payee Information	Address/Bank Information	Add Authorized Representative Contact/s	Review
> Payee/Vend	lor Information			
> Address Info	ormation			
> Bank Inforn	nation			
Authorized	Representative Infor	nation		
U.S. Section 1001	ne information submitte , anyone who knowing!	ed on this form is true and corr / falsifies this document may b	ect and I am authorized to submit this inform. e subject to fines and/or up to five (5) years in	ation. Per Title 18 oprisonment.
		-	-	

4. When done, click **Finish**.

Once the page accepts the entry, a Case Number (which is a help desk ticket) is generated for the transaction. Expect to receive an email from "<u>FSC.CustomerSupportDoNotReply@va.gov</u>" with your Case Number. Please allow up to two weeks for the Financial Services Center team to process your transaction. You should expect another email from the same email address letting you know when your case was completed ("Resolved").

Frequently Asked Questions

Question: After I submit my webform, when can I check the status of the form?

Answer: After submitting the webform, you may check the status of your webform from the Customer Engagement Portal home page. Select "My Profile" which opens a screen that displays the "Vendor File Form Cases". Then select the case number issued to you when you submit your form. The case number starts with "VCOM" followed by a dash and a number.



Question: I submit my webform, but never received a Case Number (a help desk ticket number) or an email with a Case Number, can I call the FSC help desk (FSC Call Care Center) for a status update?

Answer: If the system did not generate a Case Number at the time of submission, and you do not see a Case Number under your My Profile, Vendor File Form Cases, it is most likely your submission failed and needs to be resubmit. Without a Case Number, the FSC help desk (FSC Call Care Center) may be limited in their ability to provide support and they most likely ask you to resubmit your form.

Question: If my initial webform was successful and I received a Case Number, can I call the help desk (FSC Call Care Center) for a status update?

Answer: After you submit the webform, *please wait up to 15-days* to contact the VA FSC for follow up/status updates. If you did not receive an email update by that time, yes, you may call the FSC Call Care Center for a status update.

Need Additional Assistance?

If you need assistance, please contact the VA FSC's help desk (Customer Care Center) at 1-877-353-9791. Please have your Case Number readily available as this will help them locate your request.