

How to Add or Update Electronic Funds Transfer (EFT) Information in NCTracks

Overview

This user guide provides step-by-step instructions for adding or updating Electronic Funds Transfer (EFT) information in NCTracks. Providers must have EFT information on file in order to be reimbursed.

Table of Contents

Overview..... 1

Table of Contents..... 1

Logging into the Provider Portal..... 1

Accessing the Manage Change Request Application 2

Tips and Important Information Regarding EFT Routing and Account Numbers..... 7

Completing the EFT Account Information Page..... 8

Common Errors When Updating the Address 9

Completing the Manage Change Request.....11

Tips for Navigating the Mange Change Request Application.....13

Logging into the Provider Portal

1. Navigate to www.nctracks.nc.gov
2. The following page will display. Click the Providers tab at the top of the page.



Figure 1: NCTracks Home

- From the **Providers** page, click the NCTracks Secure Portal icon.

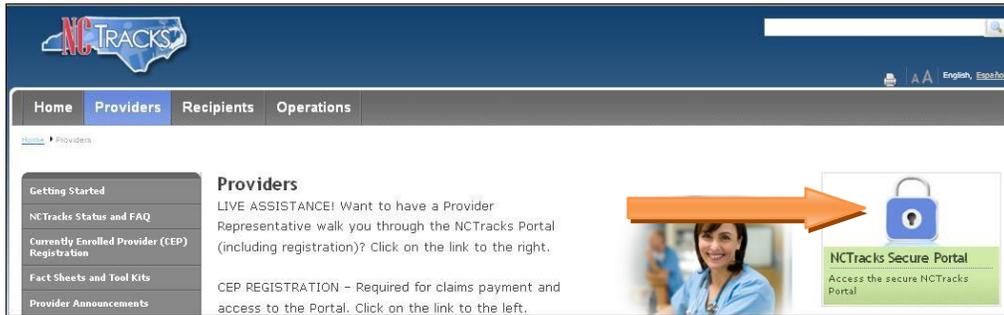


Figure 2: Providers Page

- The following login screen will display. Enter the NCID and password and click the **Log in** button.

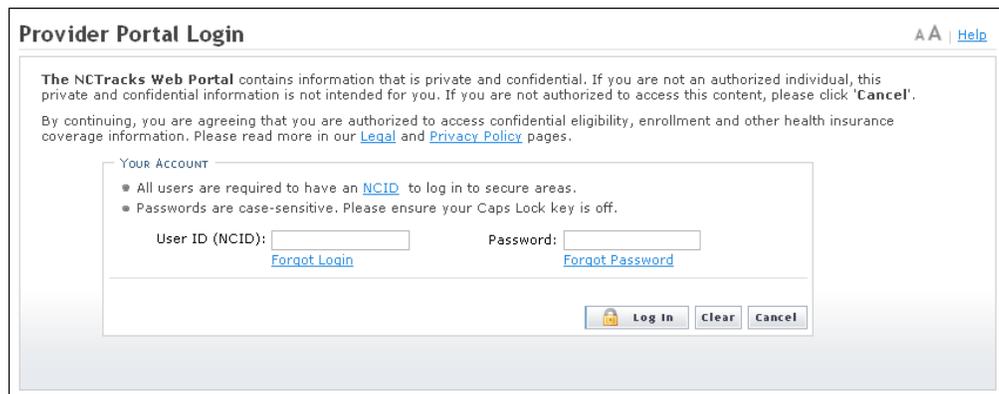


Figure 3: Provider Portal Login

Accessing the Manage Change Request Application

- The following Providers page will display. Click the **Status and Management** button.

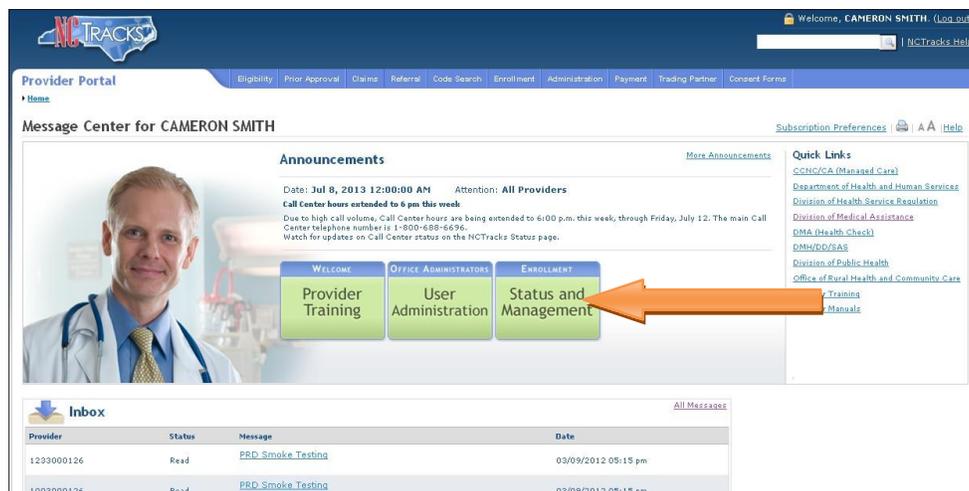


Figure 4: Select Status and Management

6. The **Status and Management** screen will display. The screen is divided into 6 sections.

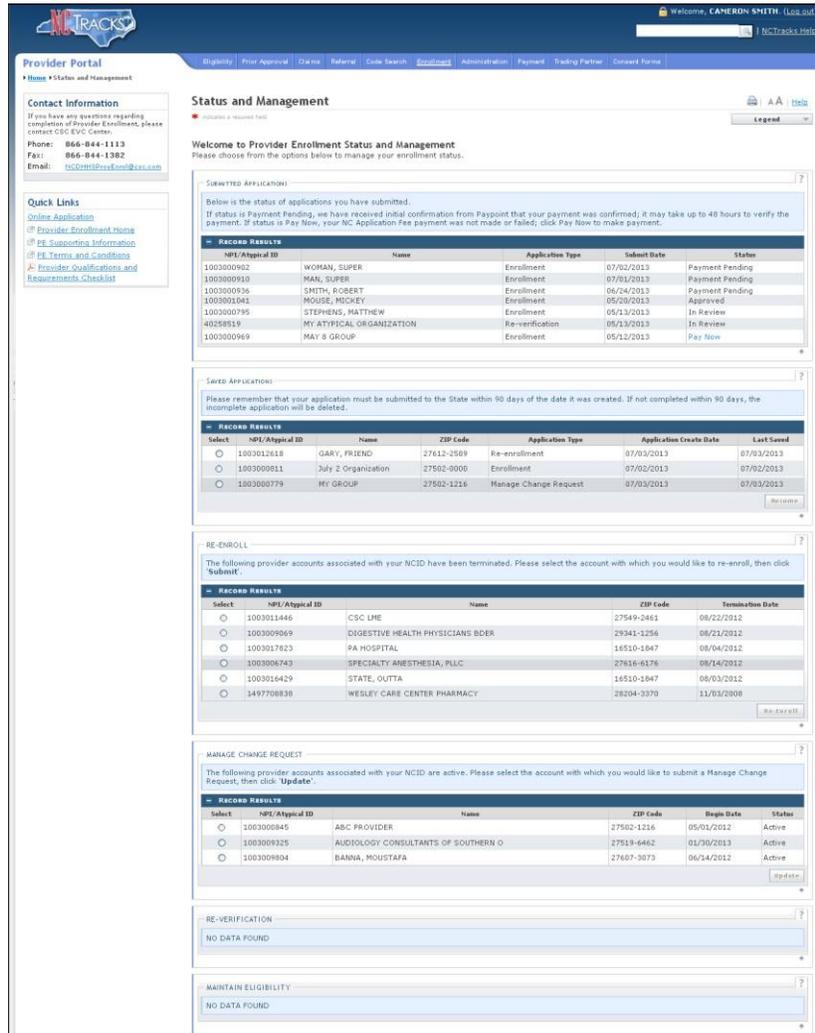


Figure 5: Status and Management Page

Status and Management Sections

- Submitted Applications:** Contains enrollment applications or change requests that have already been submitted and are currently in process.
- Saved Applications:** Contains enrollment applications or change requests that have been started but not yet submitted. Please remember that your application must be submitted to the State within 90 days of the date it was created. If not completed within 90 days, the incomplete application will be deleted.
- Re-enroll:** This section will list provider accounts associated with the user's NCID that have been terminated. The user can select the account to re-enroll, then click 'Submit'.
- Manage Change Request:** This section will list provider accounts associated with the users NCID that are active.

5. **Re-verification:** This section allows the user to submit a required re-verification application for a provider enrollment account.
6. **Maintain Eligibility:** This section allows the user to submit a required maintain eligibility application for a provider enrollment account.
7. To begin a new **Manage Change Request**, under the **Manage Change Request** Section, click the radio button next to the NPI to be changed. Next, click the **Update** button.

 If the Manage Change Request section reads **No Data to Display**, it is possible that a Manage Change Request has already been created and/or submitted, but not yet approved. Check the **Submitted Applications** and **Saved Applications** sections for a Manage Change Request/Enrollment that is already in process.

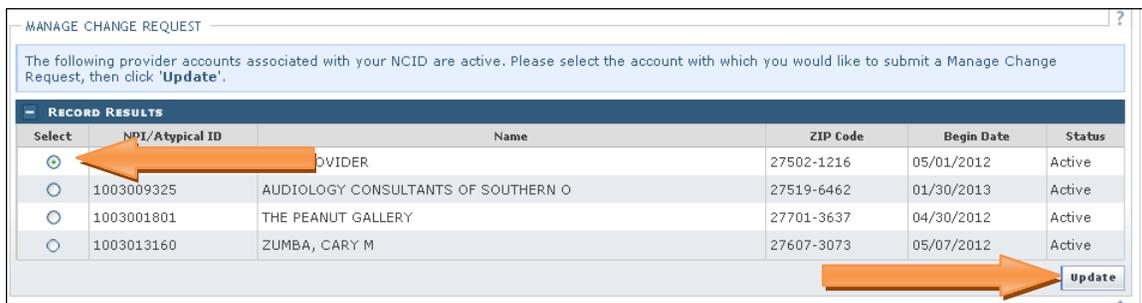


Figure 6: Select Manage Change Request

8. The **Organization Basic Information** screen will display. The left hand side menu will display a list of topics.

 Do NOT click the menu options on the left hand side of the screen, as each page must be accessed/reviewed before the **Manage Change Request** can be submitted. Instead, to navigate to appropriate section, click the **Next** button on the bottom right corner of the screen until you reach the **EFT Account Information** screen.

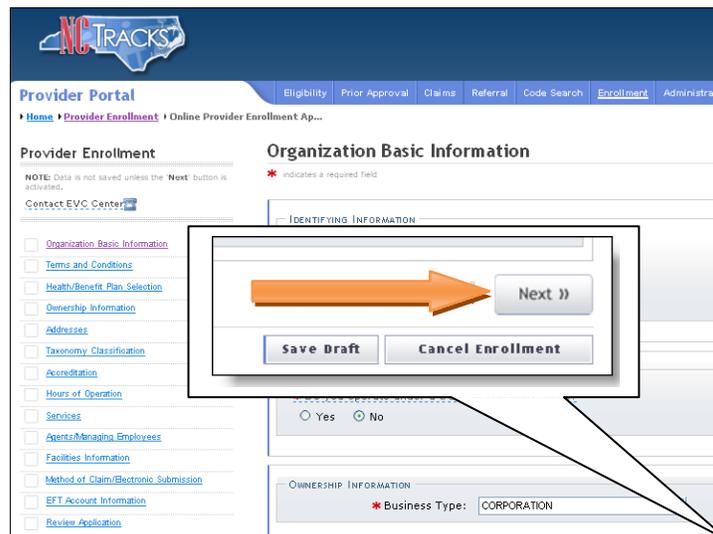


Figure 7: Organization Basic Information Page

- On the Terms and conditions page, to attest and accept Medicaid Terms and Agreements, click the check box and click the **Next** button.

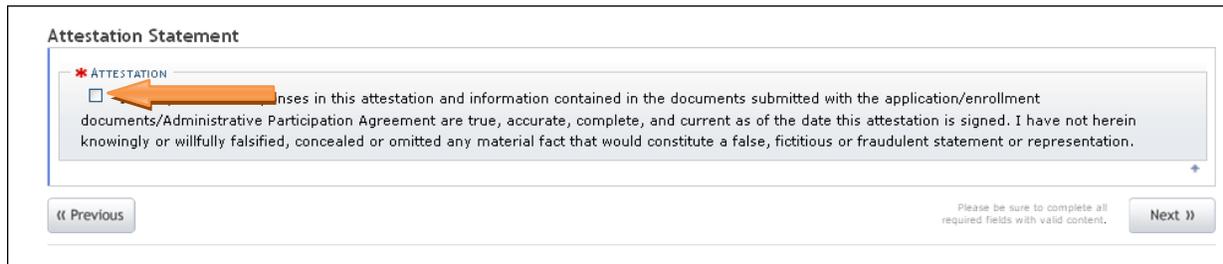


Figure 8: Attestation Statement

- Once you reach the **EFT Account Information** page, Under the **UPDATE INFORMATION** section, click the **Yes** radio button.

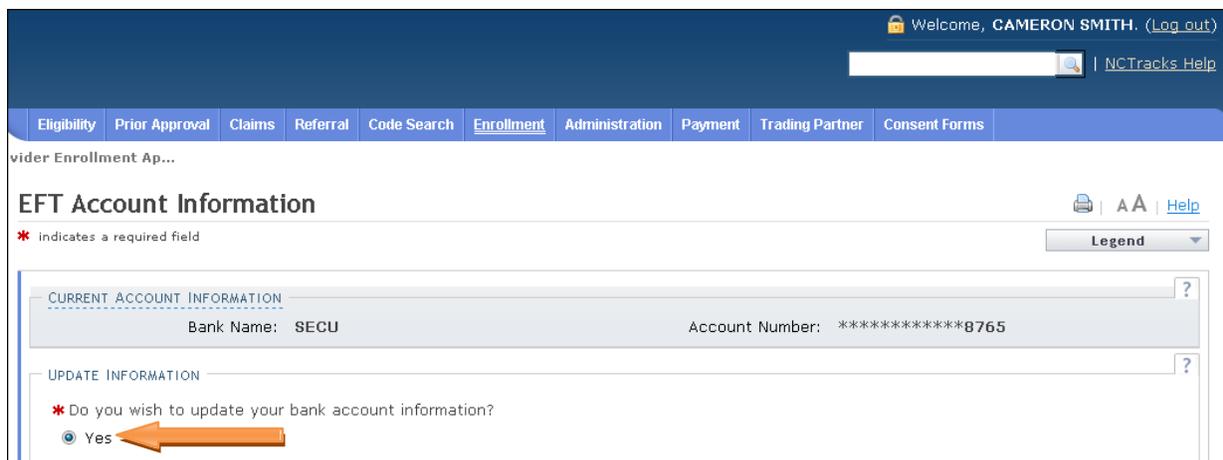


Figure 9: EFT Account Information Page

11. The EFT Account Details section will display.



Before you complete this section, please review the next page for important tips and information regarding the formatting and use of the EFT Routing and Account Numbers.

Welcome, CAMERON SMITH. (Log out) | NCTracks Help

Eligibility | Prior Approval | Claims | Referral | Code Search | **Enrollment** | Administration | Payment | Trading Partner | Consent Forms

vider Enrollment Ap...

EFT Account Information

* indicates a required field

CURRENT ACCOUNT INFORMATION

Bank Name: SECU Account Number: *****8765

UPDATE INFORMATION

* Do you wish to update your bank account information?
 Yes No

* Routing Number:

* Account Number:

* Account Type: -- Select One --

* Bank Name:

* Bank Address Line 1:

Bank Address Line 2:

* City:

* State: -- --

* ZIP Code:

* Account Number Confirmation:

[Verify Address](#)

« Previous Please be sure to complete all required fields with valid content. Next »

Figure 10: EFT Account Information Details

Tips and Important Information Regarding EFT Routing and Account Numbers

Checks vs. Deposit Slips

- ALWAYS use a check to reference the correct routing and account number. **Do NOT use the routing number off a deposit slip. The routing number on your deposit slip is used for the bank's internal system and will cause your EFT to fail.**

Bank Routing Number

- Locate the Special Characters **⑆**. The Banking Routing Number is located between these two characters and is always 9 digits in length.

Bank Account Number

- Locate the Special Character **⑈**. Your Account Number is always directly to the LEFT of this character and can be up to 17 digits in length. NOTE: If you notice extra zeroes before or after your account number, please include them as part of your account number.

NOTE: You will have to put your Account Number into the system twice.

Check Number

- The check number can be located in the bottom right, middle, or bottom left corner of the check. DO NOT include this number as part of the account number or routing number.

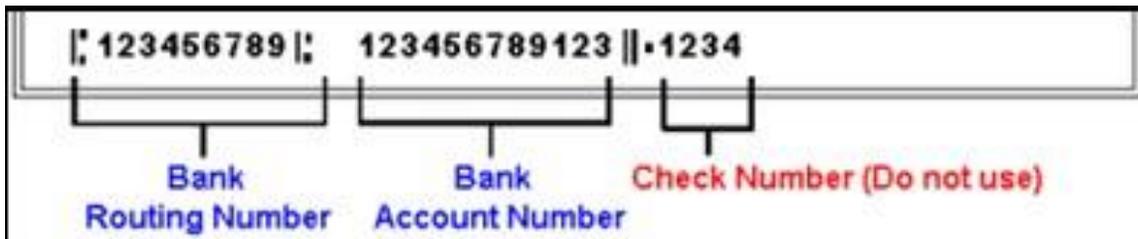


Figure 11: Check Example - Bottom Right Check Number

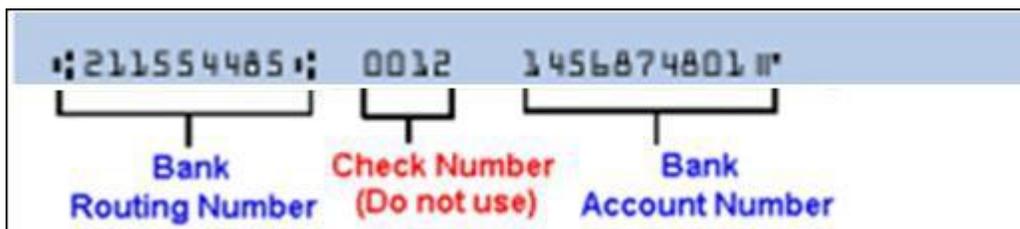


Figure 12: Check Example - Middle Check Number

Completing the EFT Account Information Page

- a. Enter The Routing Number
- b. Enter the Account Number twice
- c. Select the Account Type from the drop down men
- d. Enter the Bank Name
- e. Enter the Bank Address
- f. Click the **Verify Address** button.
- g. Click the **Next** button to continue

Important Note: For common issues/errors with resolving the Verify Address button, [click here](#).

Welcome, CAMERON SMITH. (Log out) | [NCTracks Help](#)

[Eligibility](#) | [Prior Approval](#) | [Claims](#) | [Referral](#) | [Code Search](#) | [Enrollment](#) | [Administration](#) | [Payment](#) | [Trading Partner](#) | [Consent Forms](#)

vider Enrollment Ap...

EFT Account Information

* indicates a required field

CURRENT ACCOUNT INFORMATION
 Bank Name: SECU Account Number: *****8765

UPDATE INFORMATION
 * Do you wish to update your bank account information?
 Yes No

* Routing Number:
 * Account Number: * Account Number Confirmation:
 * Account Type: -- Select One --
 * Bank Name:
 * Bank Address Line 1:
 Bank Address Line 2:
 * City:
 * State: --
 * ZIP Code:

 Please be sure to complete all required fields with valid content.

Figure 13: Complete EFT Account Information

Common Errors When Updating the Address

If the street name is not a recognized by USPS, it may result in the following error message. Double-check the formatting and spelling of the street name.

Error Summary

Please fix the following errors before you proceed. Click each error message to navigate to the field requiring correction or data entry.

- [Primary Location: Address Not Found](#)

PRIMARY PHYSICAL LOCATION ?

This is the primary physical location where service will be rendered, or in the case of mobile services, where management/supervision occurs.

* Office Phone #: ext. Office Fax #:

Begin Date: End Date It

Address

* Address Line 1:

Address Line 2:

* City: * State:

ZIP Code: County:

Figure 14: Error Message Address Not Found

If the street name is valid, but the address numbers are not recognized, it may result in the following error message. Double-check the address numbers.

Error Summary

Please fix the following errors before you proceed. Click each error message to navigate to the field requiring correction or data entry.

- [Pay-To Address: Address Not Deliverable](#)

Figure 15: Error Message Address Not Deliverable

 If the address is recognized as having a secondary unit, such as an apartment number, suite, department, or room number at a single address, it may result in the following error message.

Error Summary

 Please fix the following errors before you proceed. Click each error message to navigate to the field requiring correction or data entry.

- ServiceLocation: Missing Apt/Suite Number

Figure 16: Error Message Missing Apt/Suite Number

To resolve the error, enter the applicable Apartment, Suite or Floor Number in either the Address Line 1 or Address Line 2. The entry is not case sensitive. For example, “Suite” may be entered as “STE” or “Ste”.

You may also verify your address at the USPS website:

<https://tools.usps.com/go/ZipLookupAction!input.action>

IMPORTANT: The format of the Apartment, Suite or Floor Number must match the format that is used by the USPS. Reference the list of approved abbreviations.

* Does not require secondary range of numbers to follow the abbreviation

Secondary Unit Designator	Approved Abbreviation
APARTMENT	APT
BASEMENT	BSMT *
BUILDING	BLDG
DEPARTMENT	DEPT
FLOOR	FL
FRONT	FRNT *
HANGAR	HNGR
LOBBY	LBBY *
LOT	LOT
LOWER	LOWR *
OFFICE	OFC *
PENTHOUSE	PH *
PIER	PIER
REAR	REAR *
ROOM	RM
SIDE	SIDE *
SLIP	SLIP
SPACE	SPC
STOP	STOP
SUITE	STE
TRAILER	TRLR
UNIT	UNIT
UPPER	UPPR *

Completing the Manage Change Request

- Continue to click the next button through the Manage Change Request application until you reach the Terms and Conditions page.

The **Save Draft** button will only save your progress and will not submit the Change Request for processing.



Figure 17: EFT Account Information Click Next

- The Review Application screen will display. On the left hand margin, verify that all application pages have a green check mark next to each page. In addition, verify the contact email address listed on the page. This can be updated on the **Basic Information** page.

To review the application in Adobe PDF format, click the **Review Application** button. If you have successfully completed all required information for your provider enrollment application and are satisfied the information is complete and accurate, Click the **Next** button to proceed to the **Attachments/Submit Electronic Application** page.

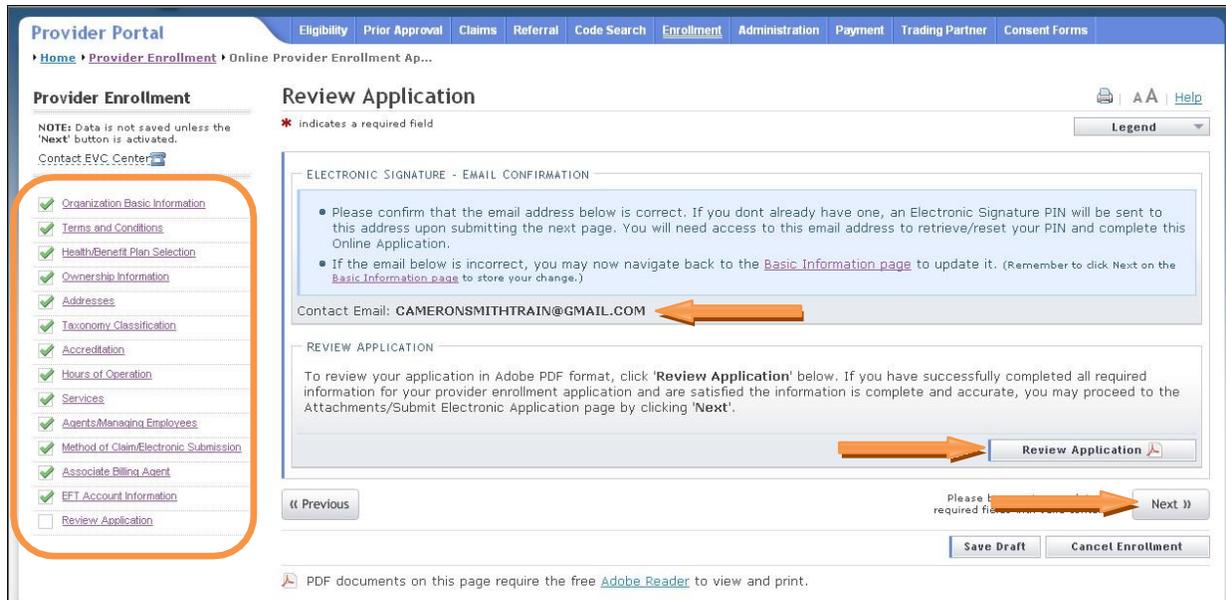


Figure 18: EFT Review Application

14. The **Sign and Submit Electronic Application** page will display. Enter the NCID and password, as well as the **PIN** number and click the **Submit Now** button.

The screenshot shows the 'Sign and Submit Electronic Application' page in the NCTracks Provider Portal. The page is titled 'Sign and Submit Electronic Application' and includes a navigation menu at the top with options like 'Eligibility', 'Prior Approval', 'Claims', 'Referral', 'Code Search', 'Enrollment', 'Administration', 'Payment', 'Trading Partner', and 'Consent Forms'. A sidebar on the left lists 'Provider Enrollment' steps, with 'Taxonomy Classification' highlighted. The main content area contains several sections: 'ELECTRONIC SIGNATURE CONFIRMATION' with an attestation statement and fields for 'Login ID (NCID)' and 'Password'; 'REQUIRED ATTACHMENTS' with a list of documents; 'ELECTRONIC ATTACHMENTS' with a file upload area; and 'ONLINE APPLICATION SUBMISSION' with a 'Submit Now' button. Orange arrows point to the 'Login ID (NCID)', 'Password', 'PIN', and 'Submit Now' fields/buttons.

Figure 19: Sign and Submit

Tips for Navigating the Mange Change Request Application

All pages must be reviewed prior to continuing. If you receive the following error, click on the pages that do not have check marks next to the section and click Next through those sections.

Error Summary

Please fix the following errors before you proceed.

- **Please complete all pages in this application before proceeding.**

Figure 20 Error - Complete all Pages in the Application

The screenshot shows the 'Review Application' page in the Provider Portal. On the left, a sidebar lists various sections: Organization Basic Information, Terms and Conditions, Health/Benefit Plan Selection, Diversity Information, Addresses, Taxonomy Classification, Accreditation, CCNC/CA, Physician Extender Participation, Hours of Operation, Services, Agents/Managing Employees, Facilities Information, Method of Claim/Electronic Submission, EFT Account Information, and Review Application. The 'Review Application' section is currently selected. The main content area displays an 'ELECTRONIC SIGNATURE - EMAIL CONFIRMATION' section with a message: 'Please confirm that the email address below is correct. If you dont already have one, an Electronic Signature PIN will be sent to this address upon submitting the next page. You will need access to this email address to retrieve/reset your PIN and complete this Online Application. If the email below is incorrect, you may now navigate back to the Basic Information page to update it.' Below this is a 'REVIEW APPLICATION' section with a 'Review Application' button. At the bottom, there are 'Save Draft' and 'Cancel Enrollment' buttons. Orange arrows point from the 'Organization Basic Information', 'Terms and Conditions', 'Health/Benefit Plan Selection', and 'Diversity Information' sections in the sidebar to the main content area, indicating that these sections are incomplete and need to be reviewed.

Figure 21: Review Application - Incomplete Pages