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.

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

![Figure 2: Providers Page](image)

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

![Figure 3: Provider Portal Login](image)

**Accessing the Manage Change Request Application**

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

![Figure 4: Select Status and Management](image)
6. The **Status and Management** screen will display. The screen is divided into 6 sections.

![Status and Management Screen](Image)

**Figure 5: Status and Management Page**

**Status and Management Sections**

1. **Submitted Applications**: Contains enrollment applications or change requests that have already been submitted and are currently in process.

2. **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.

3. **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'.

4. **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](image)

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](image)
9. 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](image)

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

![Figure 9: EFT Account Information Page](image)
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.

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.
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 menu
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](#).

![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](image)

**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 #**: 318-444-2222
- **Office Fax #**: 000-000-0000
- **Begin Date**: 05/01/2012
- **End Date**: 

![Address Details](image)

- **Address Line 1**: 2610 Easy Street
- **Address Line 2**: 
- **City**: APEX
- **State**: NC
- **ZIP Code**: 27502-2149
- **County**: Wake

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](image)

**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.

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

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:


**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
Completing the Manage Change Request

12. 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](image)

13. 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](image)
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.
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

![Figure 21: Review Application - Incomplete Pages]