## Revision History

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1 Accessing the Provider Portal

This section includes instructions for Child Care program providers to log in to the Provider Portal and register online.

Logging In

The following procedure is intended for registered users for logging in to the application.

**Note:** New users must complete the First Time Registration procedure before they can log in to the application.

To log in to the Provider portal:

1. Go to the ebtEDGE home page ([www.ebtEDGE.com](http://www.ebtEDGE.com)).
2. Click **Provider Login** in the left navigation bar. The **Child Care Provider Log In** page displays.

![Provider Log In Page](image)

3. You can view relevant documents by selecting from these options in the green banner at the top of the page:
   - Agreements
   - POS Download
   - Manuals

4. Enter your **UserID** and **Password** in the respective fields.

5. Click the **Login** button.

**First Time Registration**

You can register as a Child Care provider online or by using a paper form.

**Note:** Before you can register, you must follow your state’s guidance to obtain an **FIS Provider ID**, either from the State or from FIS directly.

**Online Registration**

The **Provider Registration** screen is used for online registration. Click the **Complete your contract or register online now** link on the Log In page.
The Provider Registration screen displays.

Provider Registration

The Provider Registration page displays fields in two sections:

- **Provider Identification**
- **User Access**

*Note: You must enter valid information for all fields in the Provider Identification and User Access sections, and then click the **Continue** button to begin the online registration process, or error messages will display.*
Provider Identification Section
1. Enter the FIS provider identification number in the FIS Provider ID field.
   
   **Note:** Follow your State’s guidance to obtain your FIS Provider ID, either from the State or from FIS directly.

2. Enter your contact phone number in the Provider Phone # field.

3. Select the appropriate item from the State or Program drop-down list.

4. Enter the last four digits of your bank account number in the Last 4 digits of Provider’s Bank Account # field.

   **Note:** This field is disabled if you selected “New Provider” from the State or Program drop-down.

   You can hover over the Help? link to view how to locate your bank account number.

User Access Section
1. Enter a valid email address in the User ID field.

   **Note:** The email address must be unique in the Provider Portal. You cannot register using an email that has been registered previously.

2. Enter the email address that you entered in the User ID field again in the Re-enter User ID field.

3. Enter your password in the Password field.

4. Enter the password that you entered in the Password field again in the Confirm Password field.

5. Select three different questions from the Challenge Question drop-down lists. There are many Challenge Questions currently in the list; examples are:
   
   - What is your city of birth?
   - What is your favorite beverage?
   - What is your favorite food?

6. Enter your answers to the selected questions in the Challenge Response fields.

7. Enter the CAPTCHA text in the text box.

8. Click the Continue button to begin the online registration process. The Provider Registration (Step 2 of 5) screen displays.

   or

   Click the Cancel button if you want to clear the entered fields and enter them again.
Provider Registration (Step 2 of 5)

1. Click the View Agreement button. The system displays the State’s Agreement form.

Step 2 of 5 – Provider Registration

2. Click the Continue button. The Provider Agreement (Step 3 of 5) screen displays.

Provider Agreement (Step 3 of 5)

Follow the instructions given on the screen.

1. Select the check box to acknowledge that you have read and agreed to the agreement.

Step 3 of 5 – Provider Registration

2. Click the Yes, I accept these terms button. The Provider Agreement (Step 4 of 5) screen displays.
Note: If you do not agree and click the **No. I do not accept these terms** button, then you will be directed back to the Log In page. If you click the **Back** button, you will be directed to the previous page to review the agreement.

Provider Agreement (Step 4 of 5)

1. Enter the requested information and select the appropriate options given in the screen.

Field Descriptions

**Address 1**
Display Only
The first line of the Provider’s street address.

**Address 2**
Display Only
The second line of the Provider’s street address.

**City**
Display Only
The Provider’s city.

**State**
Display Only
The Provider’s State.

**Postal Code**
Display Only
The zip code of the Provider’s address.

**Use of Point of Sale (POS) Terminal**
Select the appropriate option:
- Payment using the Web (Internet) / Payment using the Phone (IVR)
- Monthly POS Terminal Fee

**Connectivity Type of POS Terminals**
Select the appropriate option:
- No POS Terminal needed
- Dial up only
- Broadband Internet with Dial backup

**PIN Pad Requirements**
Select this option if you require an external PIN pad:
- External required

**First Name**
Enter the first name of the contact person for the Provider.

**Last Name**
Enter the last name of the contact person for the Provider.

**Phone # (if different)**
Enter the phone number of the Provider’s contact person if it is different from the primary phone number shown at the top of the page.

**Email**
Enter the Provider’s email address.
Emergency Phone #
   Enter the emergency contact phone number of the Provider.

IRS Legal Filing Name
   Enter the legal name of the Provider’s enterprise used for tax filing purposes. If the Provider files with a Social Security Number (SSN), the IRS legal name CANNOT be the name of the company. The SSN must match the person the SSN is assigned to.

Federal Tax ID or SSN
   Enter the Federal Tax Identification number or the Social Security Number of the Provider. Then, select the correct option:
   • Federal Tax ID
   • SSN

Type of Business
   Select the type of business. Options include:
   • Corporation
   • Individual / Sole Proprietor
   • Partnership
   • Nonprofit / Tax-exempt
   • Government Entity
   • LLC
   • Foreign Entity


Bank Routing Number
   Enter the bank routing number of the Provider.

Re-Enter Bank Routing Number
   Re-enter the bank routing number.

Bank Account Number
   Enter the bank account number of the Provider.

Re-Enter Bank Account Number
   Re-enter the bank account number.
Account Type

Select the type of bank account. Options include:

- Checking
- Prepaid
- Savings

Transaction Processing Cutoff Time

Enter the time of day that the Provider cuts off transaction processing each business day.

Then, select AM or PM.

2. Click the Continue button. The Provider Agreement (Step 5 of 5) screen displays.

Provider Agreement (Step 5 of 5)

1. Enter your name in the Signed By field and and your business title in the Title field on the screen.

2. Click the Continue to ebtProvider button to submit the contract.
Provider Registration Confirmation

The Provider Registration Complete page displays a confirmation message indicating that the online registration process was successfully completed.

1. Click the Continue to ebtpProvider button to begin using the application.
2. Click the Log off button to return to the Child Care Provider Log In page.

Forgot My Password

If you forget your password, you can request a new one.

To request a new password:

1. Click the Did you forget your password link on the Child Care Provider Log In page.
The Forgot Your Password page displays:

**Forgot Your Password**

**Submit Your User ID**

2. Enter your email address in the **User ID** field.
3. Enter the CAPTCHA text that you see on the screen in the text box.
4. Click the **Next** button or click the **Cancel** button to return to the Child Care Provider Log In page.
The Answer Your Challenge Question(s) page displays

**Forgot Password – Challenge Question**

5. Answer the challenge question that appears; you must enter the same challenge response that you entered when you registered.

6. Enter the CAPTCHA text in the text box.

7. Click the **Next** button (or click the Cancel button to return to the Forgot Your Password page). After you click **Next**, FIS sends an email to you with a temporary password.

The Log In Using Using Temporary Password page displays:

**Confirmation with Instruction**

8. Click **OK** to be returned to the Log In page. Log in using the temporary password. The application prompts you to immediately enter and re-enter a new password.

9. You next receive an email with a temporary password. The email address used is the one entered when your security administrator issued your User ID.
10. Log in again to the Agency Portal with your new temporary password and update it when prompted.
2 Application Tabs

Home Tab

Select the **Home** tab to access features and information quickly.

The **Home** tab displays links to the following features in different panels:

- **News Alerts**
- **Help Topics**
- **Documentation**
- **Update my profile**
- **Services**

Click the topic links for more information.
Update My Profile

You can change your password and update challenge questions and responses by selecting the Update my profile link on the Home page.

Note: Once you select Challenge Questions and Responses the first time you log in, it is not necessary to change the questions and responses again unless you decide to.

The system allows you to update your profile in the following ways:

- Change your password and answer your existing challenge questions.
- Change your password and the responses to your existing challenge questions.
- Change your password and challenge questions and responses.

In all cases, you must change your password and answer (or change) all three challenge questions.
Services Tab

Select the Services tab to access services that you have permission to view and/or update.

Services Tab

The following services are currently available:

- Provider Information
- Provider Contract
- Provider Deposits
- Provider Transactions
- Supply Requests
Documentation Tab

Select the **Documentation** tab to view the available documentation.

To filter your document selection

1. Select the type of document from the drop-down list next to the **Select a Type** field.
2. Select a service from the drop-down list next to the **Select a Service** field.
3. Click the **Search** Button. The selected documents display.

To view the document

Click the document name below the **Title** field. The PDF of the selected document displays.

Click the **Back To Top** link to scroll to the top of the Documentation tab.
Help Topics Tab

Select the Help Topics tab to go to the Help Topics page. Click the required link to go to a specific Help Topic.

News Tab

Select the News tab to go to the News page. Click the required link in the News section to go to a specific news item.

Choose a category from the Select a News Category drop-down and click on Search. Click on a news title to view the item.
3 Provider Services

Child Care providers can perform the following tasks online:

- View and update Provider Information
- Review Provider Contract
- View Provider Deposits
- View Provider Transactions
- Request Supplies

View and Update Provider Information

Select the link on the Services tab to access a page that displays the information about the provider that was entered upon registration:
To update Provider Information:

1. Modify the required information on the Provider Information page.

2. Click the **Update** button.

**Note:** The Update button displays only with the required permission(s), otherwise the information is read-only and cannot be updated.

If information is updated, a page displays a confirmation message.

### Review Provider Contract

Select the link on the **Services** tab to access a page that displays the Provider Contract. The Provider Contract will open in the word format in a new window.
View Provider Deposits

Select the link on the Services tab to view and print the Provider Deposits list, and view and print your deposit details.

Provider Deposits with Date Selection

Select the Date radio button, and click the calendar icon to select the date for which you want to display the Provider Deposits,

or

Select the Date Range radio button, and click the calendar icons next to the From and To fields to select the date range of deposits you want to display.

Note: By default, the Date radio button is selected.

Click the Show Deposits button to view all deposits in order by settlement date, most recent first (or click the Back to Services link at the top of the page to return to the Service tab).
Provider Deposits

Click the Next link on the page to view the next set of Provider Deposits.

Click the Back to Services link at the top of the page to return to the Services tab.

Click the Back to Date Selection link at the top of the page to return to the Provider Deposits - Date Range page.

To save a search result

1. Select the category from the drop-down list next to the Save Search Result field. By default, the value “Summary-This Page” displays in the Save Search Result field.

2. If you select the Excel radio button next to the Save Search Result field and click the Save button, the displayed Provider Deposits list opens in an Excel format:

<table>
<thead>
<tr>
<th>Settlement Date</th>
<th>Settlement Amount</th>
<th>Deposit Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/03/20XX</td>
<td>$700.00</td>
<td>Merchant Deposits Credit DD</td>
</tr>
<tr>
<td>04/03/20XX</td>
<td>$1480.25</td>
<td>Merchant Deposits Credit DD</td>
</tr>
<tr>
<td>04/03/20XX</td>
<td>$410.00</td>
<td>Merchant Deposits Credit DD</td>
</tr>
<tr>
<td>11/17/20XX</td>
<td>$700.00</td>
<td>Merchant Deposits Credit DD</td>
</tr>
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<tr>
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<td>$410.00</td>
<td>Merchant Deposits Credit DD</td>
</tr>
</tbody>
</table>
3. If you select the **PDF** radio button next to the **Save Search Result** field and click the **Save** button, the displayed Provider Deposits list opens as a PDF file.
Print page

You can also print directly from the Providers Deposits page, by clicking on the Printer Friendly Version link:
### Provider Deposits – Printer Friendly Option

The printable page contains instructions to click the Print icon on your browser and a link to **Back to Deposit List** to return to the regular view:

**Click the Print icon on your browser window or click File and then Print**

### Provider Deposits

**Deposit List**

<table>
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<tr>
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<td>$410.00</td>
<td>Merchant Deposits Credit-DD</td>
</tr>
</tbody>
</table>

### Provider Deposits – Printable Page

**To view the deposit details**

Click on the **Settlement Date** link in the Provider Deposits page to view the Provider Deposits Detail page:
Provider Deposits Detail

The Providers Deposit Detail page contains the same options as the Provider Deposit page to open the page in Excel or PDF to print or save to your computer. There is also a Printer Friendly Version link to open a page for printing.

Provider Deposits Detail – Printer Friendly Option
View Provider Transactions

Select the link on the Services tab to view the Provider Transactions list.

Select an option from the Filter By drop-down selector to show the following transactions in the list:

- Approved
- Declined
- All

Click the Next link on the page to view the next set of Provider Transactions.

Click the Refresh button to refresh the list using the options you have currently selected.

To export a search result

1. Select the category from the drop-down list next to the Save Search Result field. By default, the value “Summary-This Page” displays in the Save Search Result field.

2. If you select the Excel radio button next to the Save Search Result field and click the Export button, the displayed Provider Transactions list opens in an Excel format:

3. If you select the PDF radio button next to the Save Search Result field and click the Export button, the displayed Provider Transactions list opens as a PDF file.
Supply Requests

Select the link on the Services tab to order products, submit your order form, and request for the ordered products to be shipped to your mailing address.

There is also a link to View Previous Orders.
Order Supplies

1. Select the product(s) from the drop-down list next to the Product field. The description of the selected product item(s) to be ordered displays in the Item Description box.

2. Enter the number of products that you want to order in the Quantity field.

3. Click the Add button. The ordered product(s) list display in the Order this box.

To remove selected products from the displayed list:

Click on a product in the Order this list box, and click the Remove button. The removed products are moved back from the Order this box to the Item Description box.

To remove all the products from the displayed list:

Select all the products by clicking on each in the Order this box, and click the Clear All button. All the products are moved back from the Order this box to the Item Description box.

4. Click the Create Order Form button. The Supply Requests – Shipping Information page displays:
Supply Requests – Shipping Information

The Supply Requests – Shipping Information page has two sections:

- Shipping Information
- Order Detail

**Shipping Information Section**

The Shipping Information section displays the shipping information data from the database. Verify the shipping address before submitting the order to ensure prompt delivery of the products that you ordered.

*Note:* You cannot update the shipping address details, as address information is a one time event for shipment of the order.

**Order Detail Section**

In the Order Detail section, you can perform the following tasks:

- Delete the ordered product(s) from the list
- Add more products to the ordered list
- Submit the order
- Cancel the order
To delete products from the ordered list

1. Select the checkbox(es) below the **Delete** field for products to be deleted from the displayed list in the Order Detail section of the Supply Requests - Shipping Information page.

2. Click the **Delete Checked Items** button. The selected ordered products are deleted from the displayed list.

To add more products to the ordered list

1. Click the **Add More Items** button in the Order Detail section of the Supply Requests - Shipping Information page:
Supply Requests – Add More Items

2. The Supply Requests screen displays and allows you to order more products.

To submit the order
Click the Submit Order button in the Order Detail section of the Supply Requests - Shipping Information page.
Supply Requests – Submit Order

A confirmation message displays on the Supply Requests page indicating that the order was submitted successfully.

To cancel the order

Click the Cancel Order button in the Order Detail section of the Supply Requests - Shipping Information page.
Supply Requests – Cancel Order

Your order is cancelled and you are returned to the Supply Requests page.