



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 **need access to an active email address** 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.

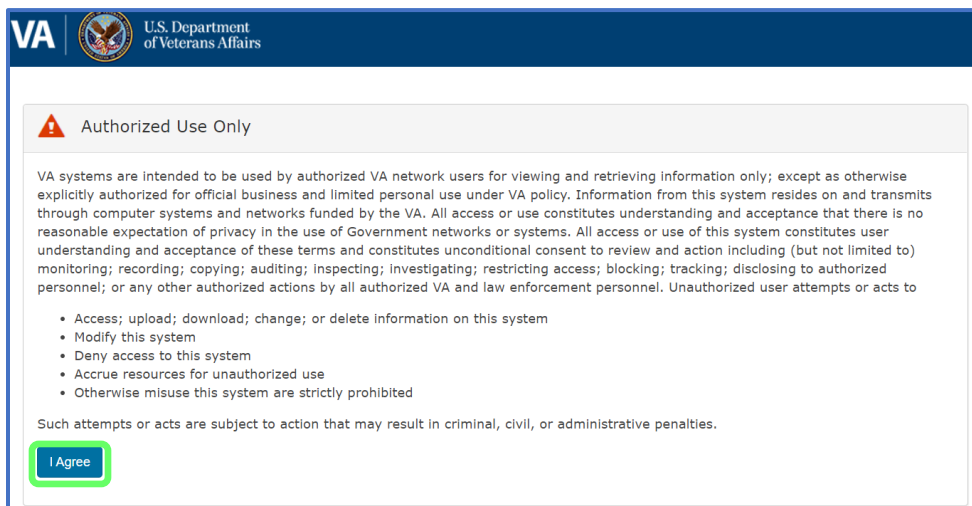
Welcome to the VA Customer Engagement Portal (CEP)

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**”.



The screenshot shows the top header of the VA Customer Engagement Portal. On the left is the VA logo, and on the right is the text "U.S. Department of Veterans Affairs". Below the header is a warning box with a red triangle icon and the title "Authorized Use Only". The box contains a paragraph of legal text regarding system use, followed by a bulleted list of prohibited actions. At the bottom of the box is a blue button with the text "I Agree".

VA U.S. Department of Veterans Affairs

Authorized Use Only

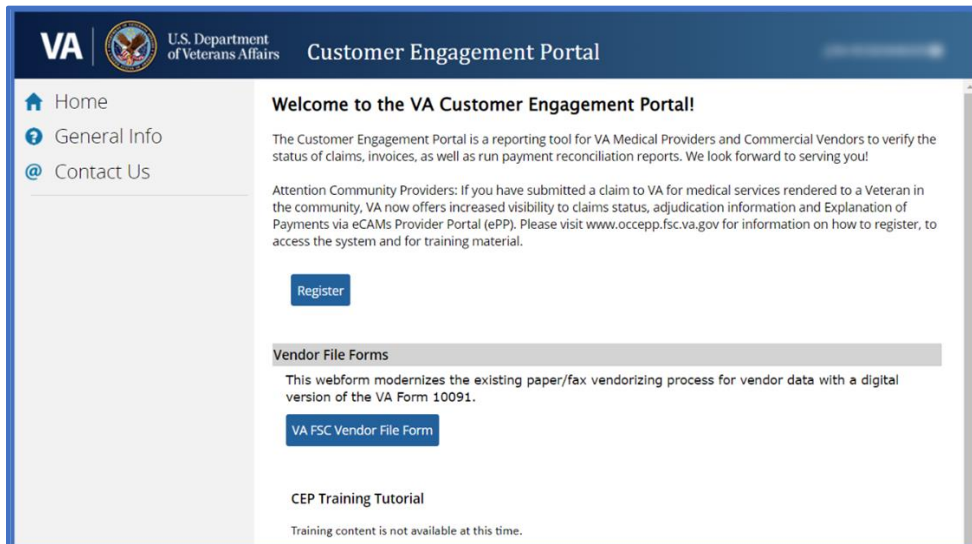
VA systems are intended to be used by authorized VA network users for viewing and retrieving information only; except as otherwise explicitly authorized for official business and limited personal use under VA policy. Information from this system resides on and transmits through computer systems and networks funded by the VA. All access or use constitutes understanding and acceptance that there is no reasonable expectation of privacy in the use of Government networks or systems. All access or use of this system constitutes user understanding and acceptance of these terms and constitutes unconditional consent to review and action including (but not limited to) monitoring; recording; copying; auditing; inspecting; investigating; restricting access; blocking; tracking; disclosing to authorized personnel; 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
- Modify 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 Agree

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.)

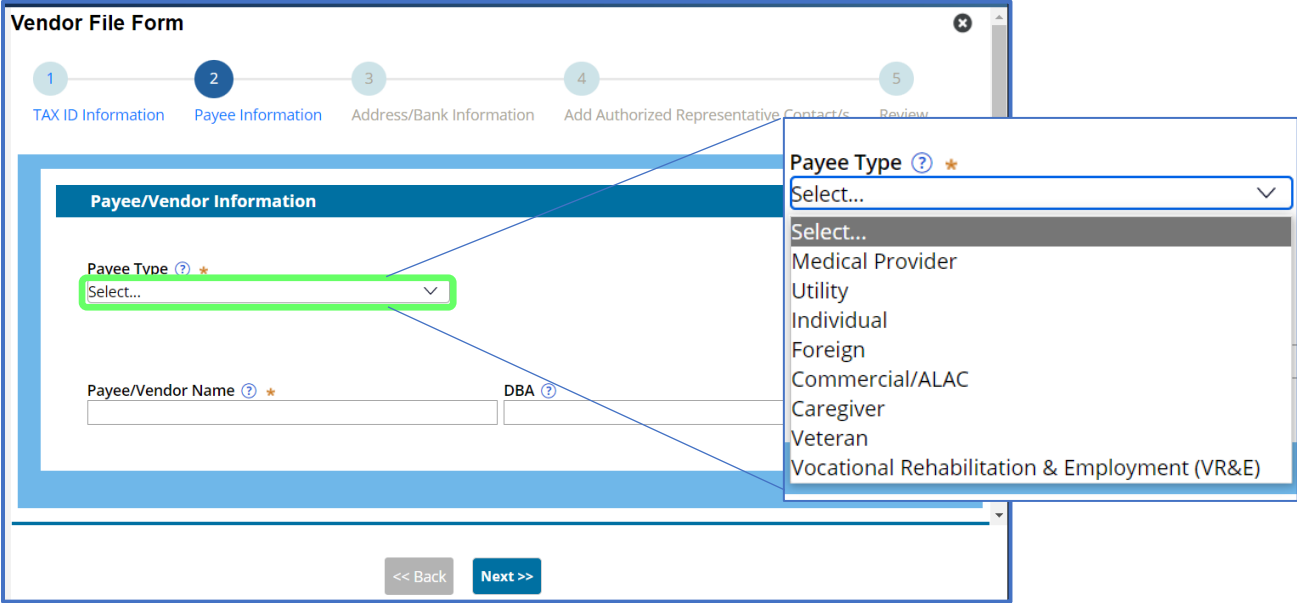
The screenshot shows the 'Vendor File Form' in the VA Customer Engagement Portal. The page title is 'Vendor File Form' and the user is logged in as '<User's Name>'. A progress bar at the top indicates five steps: 1. TAX ID Information (current), 2. Payee Information, 3. Address/Bank Information, 4. Add Authorized Representative Contact/s, and 5. Review. The main content area includes a welcome message, instructions to enter a 9-digit legal identification number, and two input fields for 'Tax Identification Number/Social Security Number' and 'Re-enter TAX ID/SSN', both highlighted with green boxes. Below these are radio buttons for 'Request Type' (New or Update) and a question 'Is the account that you are adding or updating registered with SAM.gov?' with 'Yes' and 'No' options. A 'Next >>' button is at the bottom right.

2. 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**.
3. 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**.

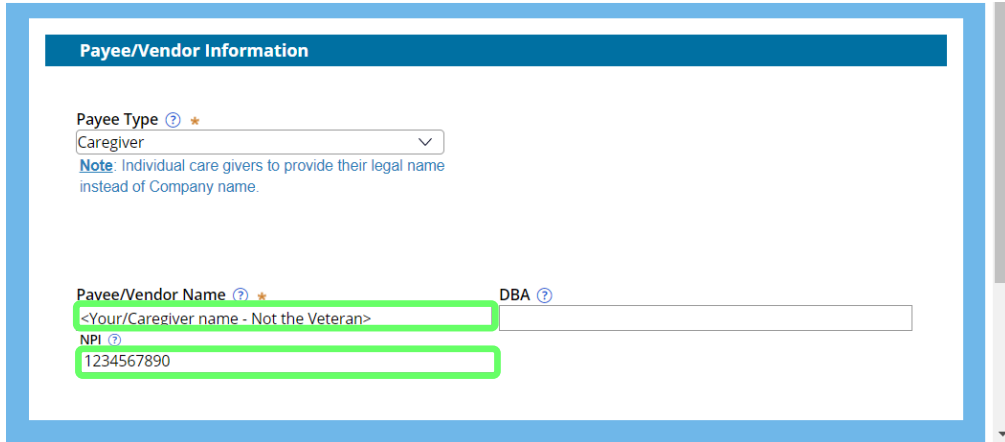
This close-up screenshot shows the input fields for the 'TAX ID Information' step. It includes two masked text boxes for 'Tax Identification Number/Social Security Number' and 'Re-enter TAX ID/SSN'. Below them are radio buttons for 'Request Type' with 'New' selected. The question 'Is the account that you are adding or updating registered with SAM.gov?' has 'No' selected. A 'UEI' field is present with a placeholder 'Alphanumeric. Ex: 1234567890AB'. A 'Next >>' button is at the bottom.

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.



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**.



The screenshot shows a web form titled "Payee/Vendor Information". The form contains the following fields and elements:

- Payee Type**: A dropdown menu with "Caregiver" selected. A note below it reads: "Note: Individual care givers to provide their legal name instead of Company name."
- Payee/Vendor Name**: A text input field containing the placeholder text "<Your/Caregiver name - Not the Veteran>".
- DBA**: A text input field, currently empty.
- NPI**: A text input field containing the number "1234567890".

Green rectangular highlights are drawn around the "Payee/Vendor Name" field, the "NPI" field, and the "DBA" field label.

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.
5. 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.

The screenshot displays two sections of a web form. The top section, titled 'Current Payee Mailing Address', contains fields for 'Address Line 1 *' (filled with '123 Sesame Street'), 'Address Line 2', 'City *' (filled with 'New York'), 'State *' (a dropdown menu showing 'NY'), and 'Zip *' (filled with '11754'). The bottom section, titled 'Current Payee Bank Information', contains fields for 'Routing Number *' (filled with '043000096'), 'Bank Name *' (auto-populated with 'PNC BANK NATIONAL ASSOCIATION'), 'Account Number *' (filled with '<No Check #>'), and 'Re-enter Account Number *'. Below these is an 'Account Type *' section with radio buttons for 'Checking' (selected) and 'Savings'. At the bottom of the form are '<< Back' and 'Next >>' buttons.

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.

1. 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 you do not have 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.

The screenshot shows the 'Vendor File Form' with a progress bar at the top indicating five steps: 1. TAX ID Information, 2. Payee Information, 3. Address/Bank Information, 4. Add Authorized Representative Contact/s (highlighted), and 5. Review. Below the progress bar is the 'Authorized Representative Contact Information' section. A note states: 'A person authorized to change banking or address information on your behalf.' The form contains several input fields: 'First Name *' (with 'First' entered), 'Last Name *' (with 'Last' entered), 'Official Title *', 'Email Address *', 'Phone Number *' (with '51291131111' entered), and 'Fax Number'. At the bottom left is a '+ Add Additional Contact' button, and at the bottom right is a 'Next >>' button highlighted in green.

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.

This screenshot shows the same form as the previous one, but with the input fields filled out with redacted information (indicated by green bars). The 'First Name' field contains 'First', 'Last Name' contains 'Last', 'Phone Number' contains '51291131111', and 'Official Title' contains 'Mr.'. The 'Next >>' button at the bottom right is highlighted in green. Below the form is a 'Notes' section with a text area for 'Enter any Notes/Comments' and a 'Delete' link in the top right corner.

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

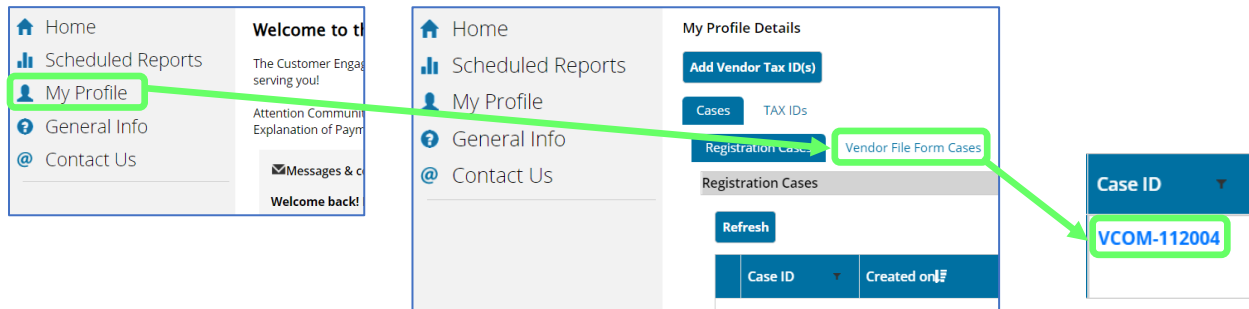
The screenshot shows the 'Vendor File Form' interface. At the top, a progress bar indicates five steps: 1. TAX ID Information, 2. Payee Information, 3. Address/Bank Information, 4. Add Authorized Representative Contact/s, and 5. Review. Step 5 is currently selected and highlighted. Below the progress bar, there are four expandable sections, each with a right-pointing arrow and a label: 'Payee/Vendor Information', 'Address Information', 'Bank Information', and 'Authorized Representative Information'. At the bottom of the form, there is a certification statement: 'I certify that the information submitted on this form is true and correct and I am authorized to submit this information. Per Title 18 U.S. Section 1001, anyone who knowingly falsifies this document may be subject to fines and/or up to five (5) years imprisonment.' To the left of this statement is a checkbox. At the very bottom, there are two buttons: '<< Back' and '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 “FSC.CustomerSupportDoNotReply@va.gov” 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.

Thank you for you service to our Nation’s Veterans!