



INSTRUCTIONS FOR THE COMPLETION OF An EFT PAYMENT ACCOUNT SET-UP FORM and Entry of ManageAR Payment Account

1. Create and Save the Payment Account in ManageAR inside our secure web portal.
2. Complete the ManageAR EFT Setup (On-line Fillable Form) and email to help@ncrb.org for activation.

Complete all of the fillable fields:

1. **Agency Name:** Legal business name
2. **Agency Address:** Street Address, City, State and Zip Code
3. **Primary Agency contact Name and Title:** The person who should be contacted about payment and or banking information
4. **Account Description/Name:** The nickname for the account that will appear in the drop down box inside and application when a user selects your payment account. This would be unique for each account setup
5. **Bank Name:** The agency bank name
6. **Draft Notification E-Mail Address:** The email for the person that will be notified when a payment will be deducted from the account. This is extremely important information that the Group Administrator for your company will need to maintain
7. **Name of Person Responsible for the Account:** The person authorized to sign the form and submit this request on the agencies behalf

Answer each of the following questions:

Question # 1- If this is the first time you have set up an EFT Payment Account with the NCRB, please answer “yes”.

Question #2- When setting up a subsequent account and you want to retain the original account, answer “yes”.

Question #3- If replacing a Payment Account that will no longer be used, answer “yes”. Enter the nickname/description of the account to be deactivated.

NOTE: Only one of the following questions can be answered, as “yes” it is important to read each option carefully.

Question #4- Yes only when the Payment Account is intended to be used only by one (1) user; the “Primary Agency Contact Name”/Person Responsible for the account. Answer “no”, to the “Myself” option if the answer question 5 or 6 is yes.

Question #5- When the Payment Account is intended to be used by all ManageAR Users in one (1) location, as listed in the “Agency Address” then answer “yes”. Answer no, if the answer to question 4 or 6 is yes.

Question #6- If this Payment Account is intended to be used by all ManageAR Users in all locations of your agency, please, answer “yes”, as the Multiple Location option would apply. Answer no if the answer to question 4 or five is yes.

IMPORTANT: Email the completed EFT Set-Up Form to help@ncrb.org for approval and activation by North Carolina Rate Bureau. If unable to email the document, fax to 919-783-7467. **The Analyst reviewing and activating the account may require a copy of a voided check or other additional information to complete the process.**