

# Partner Portal User Guide



The Partner Portal is designed to be the main communication point for all Housing Choice Voucher (HCV) Landlords/Owners, 24x7. Access to financial statements, Annual 1099s, requests, and alerts are all available through this portal.

Diana Hendrix

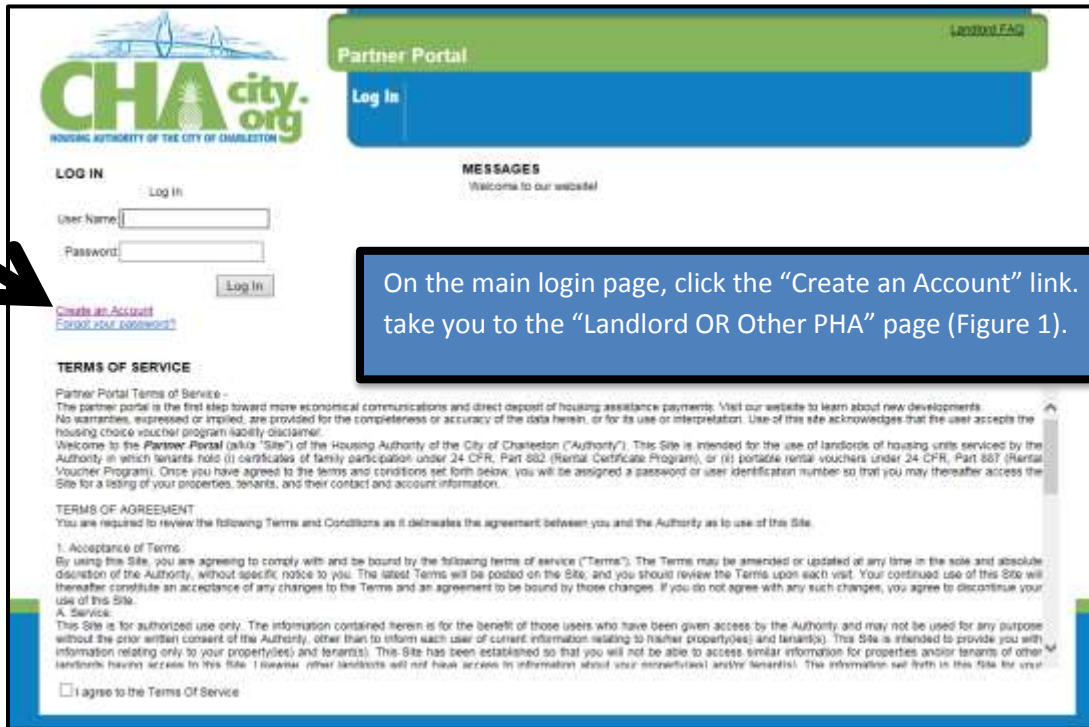
Housing Authority of the City of Charleston

9/1/2015

# LANDLORD USER

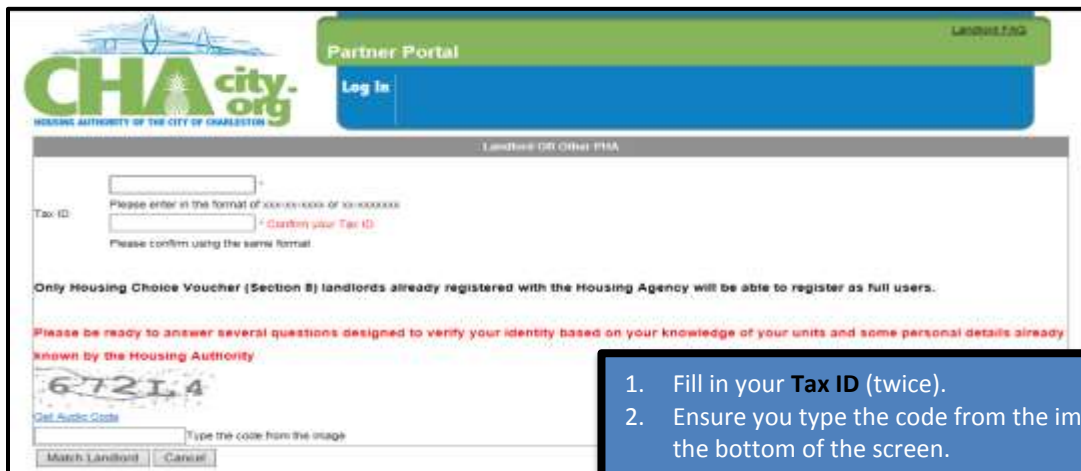
## 1. First-Time Setup - To create an Account and Login to Partner Portal

Open up an internet browser and go to the URL (<https://charleston.partnerinhousing.com>).



The screenshot shows the 'Partner Portal' login page for CHA city.org. It features a 'Log In' button at the top right and a 'LOG IN' section with fields for 'User Name' and 'Password'. A blue callout box with a black border points to a link that says 'Create an Account' and 'Forgot your password?'. Below the login section is a 'TERMS OF SERVICE' section with a scrollable area containing text about the Partner Portal Terms of Service and Terms of Agreement. At the bottom of the scrollable area, there is a checkbox labeled 'I agree to the Terms Of Service'.

On the main login page, click the “Create an Account” link. This will take you to the “Landlord OR Other PHA” page (Figure 1).



The screenshot shows the 'Landlord OR Other PHA' registration page. It has a 'Log In' button at the top right. The main content area has a 'Tax ID' field with a note: 'Please enter in the format of xxx-xx-xxxx or xx-xxxxxx'. Below this is a 'Please confirm using the same format' field. A red note states: 'Only Housing Choice Voucher (Section 8) landlords already registered with the Housing Agency will be able to register as full users.' Another red note says: 'Please be ready to answer several questions designed to verify your identity based on your knowledge of your units and some personal details already known by the Housing Authority'. There is a CAPTCHA image showing the number '67214' and a 'Get Audio Code' button. At the bottom, there is a 'Type the code from the image' field and a 'Match Landlord' button.

1. Fill in your **Tax ID** (twice).
2. Ensure you type the code from the image at the bottom of the screen.
3. Click on the “Match Landlord” button.

Figure 1 - Landlord Or Other PHA

This will take you to three multiple-choice security questions with 300 seconds to answer each of them. Once you have answered the three questions correctly, you will go to the create account page (Figure 3).

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**Partner Portal**

**Log In**

**Add User**

User Name  \*

Password  \*

Confirm Password  \*

Email  \* E-mail required

The Password must be composed of at least:  
 Eight characters  
 One upper case character  
 One lower case character  
 One numerical digit  
 One non alphanumeric character

**HCV Landlord**

Business Name

File Name As

Contact First Name

Contact Middle Name

Contact Last Name

Street

Suite

City

State

ZIP

Phone

Tax ID

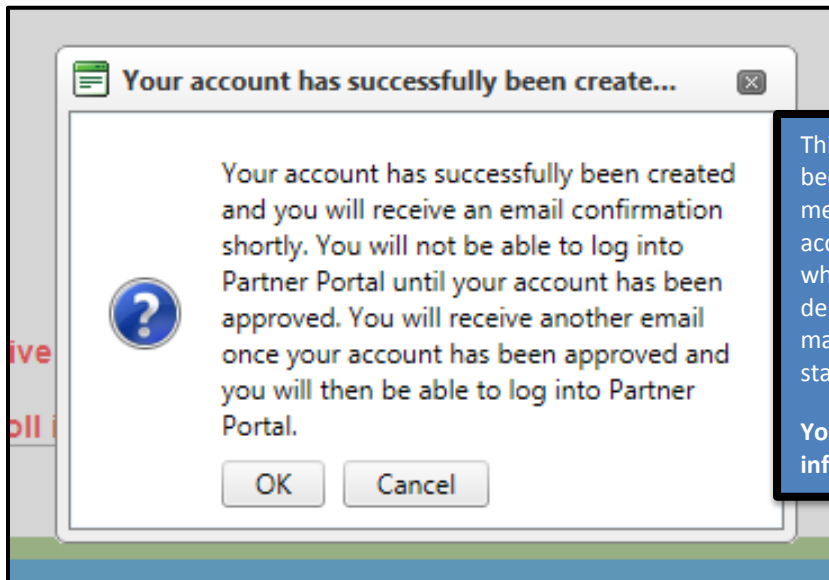
PO BOX

Charleston SC 29417

**By creating an account, you are agreeing to receive your 1099 tax forms electronically**

**By creating an account, you are agreeing to enroll into our newsletters**

1. Choose a username and enter it in the appropriate box.
2. Choose a login password. The rules for the password are listed to the right of the box. You will need to enter this password TWICE.
3. Enter the Email Address that you want the Housing Authority to use to contact you. **It is YOUR responsibility to keep this up to date.**
4. Fill in any other information that the screen requests (Ex. Phone Number, etc.) for your account creation and click the "Create Account" button.
5. NOTE: Your account will require approval before you can login.



This message tells you that your account has been created, and you will receive two email messages. The first will tell you of your account info, and the second will inform whether your account has been approved or denied. Once your account is approved, you may go back to the same screen, login, and start using Partner Portal.

**Your account could be denied if the information we have on record is not correct.**

## 2. Login into Partner Portal

Once you have received an email confirming your account has been approved, you may login.

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Partner Portal [Landlord FAQ](#)

Log In

**LOG IN**

Log In

User Name:

Password:

[Create an Account](#)  
[Forgot your password?](#)

**MESSAGES**

Welcome to the new CHACITY.ORG Landlord Portal for our Housing Choice Voucher Landlords and Portability partners.

**TERMS OF SERVICE**

Partner Portal Terms of Service -  
The partner portal is provided as a service to our Housing Choice Voucher Landlords and Portability partners. Welcome to the Partner Portal for our Housing Choice Voucher Landlords and Portability partners. Site for a listing of properties and tenants.

**TERMS OF AGREEMENT**  
You are required to accept the following terms of service:

1. Acceptance of Terms of Service  
By using the Site, you agree to the terms of service in the discretion of the Authority. These terms of service shall constitute the entire agreement between you and the Authority for your use of this Site.

A. Service  
This Site is for authorized users only. The Authority does not warrant, without the prior written consent of the Authority, other than to inform each user of content information relating to their property(ies) and tenants. This Site is intended to provide you with information relating only to your property(ies) and tenants. This Site has been established so that you will not be able to access similar information for properties and/or tenants of other properties having access to this Site. Likewise, other landlords will not have access to information about your property(ies) and/or tenants. The information set forth in this Site for use by you is intended for your use only.

I agree to the Terms Of Service

The Housing Authority of the City of Charleston • 350 Meeting Street • Charleston, SC 29403

Open up an internet browser and go to the URL (<https://charleston.partnerinhousing.com>).

Type in your User Name and Password.

Ensure you place a check mark in the “I agree to the Terms Of Service.”

Click on the “Log In” button.

### 3. HCV Landlord

View your payments (My Payments)

Welcome [redacted] to Partner Portal

My Payments My Units My Families Forms Change Password Change Email Log Out

**HCV Landlord**

- My Payments
- My Units
- Fields & Abatements
- My Families
- My 1099s
- My Profile
- Communications
  - Announcements
  - Forms
  - Requests
  - Notifications
- Setup Direct Deposit

My Payments

Checks

Check/DD #: [input] Go Unit: All

Check Date: 8/20/2012 to 8/20/2015 Go

Check/DD #	Check Date	Description	Unit	Resident	Amount
> Check/DD #:	Check Date: 08/01/15; Total Amo				
> Check/DD #:	Check Date: 07/01/15; Total Amo				
> Check/DD #:	Check Date: 06/01/15; Total Amo				
> Check/DD #:	Check Date: 05/01/15; Total Amo				
> Check/DD #:	Check Date: 04/15/15; Total Amo				
> Check/DD #:	Check Date: 04/01/15; Total Amo				
> Check/DD #:	Check Date: 03/01/15; Total Amo				
> Check/DD #:	Check Date: 02/01/15; Total Amount: \$				
> Check/DD #:	Check Date: 01/01/15; Total Amount: \$				
> Check/DD #:	Check Date: 12/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 11/17/14; Total Amount: \$				
> Check/DD #:	Check Date: 11/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 10/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 09/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 08/01/14; Total Amount: \$				

Welcome [redacted] to Partner Portal

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**HCV Landlord**

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My Payments

Checks

Check/DD #: [input] Go Unit: All

Check Date: 9/9/2012 to 9/9/2015 Go

Check/DD #	Check Date	Description	Unit	Resident	Amount
> Check/DD #:	Check Date: 06/02/14; Total Amount: \$				
> Check/DD #:	06/02/14	6/2014 HAP for			
> Check/DD #:	Check Date: 05/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 04/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 03/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 02/15/14; Total Amount: \$				
> Check/DD #:	Check Date: 02/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 01/01/14; Total Amount: \$				
> Check/DD #:	Check Date: 08/01/13; Total Amount: \$				
> Check/DD #:	Check Date: 07/01/13; Total Amount: \$				
> Check/DD #:	Check Date: 06/01/13; Total Amount: \$				
> Check/DD #:	Check Date: 05/15/13; Total Amount: \$				
> Check/DD #:	Check Date: 05/01/13; Total Amount: \$				
> Check/DD #:	Check Date: 04/01/13; Total Amount: \$				
> Check/DD #:	Check Date: 03/01/13; Total Amount: \$				

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**My Payments**

Check/DD #:  Go Unit:

Check Date:  to  Go

Check/DD #	Check Date	Description	Unit	Resident	Amount
▼	06/02/14	6/2014 HAP for [redacted]	[redacted]	[redacted]	[redacted]
>	Check/DD #	Check Date: 05/01/14; Total Amo			
>	Check/DD #	Check Date: 04/01/14; Total Amo			
>	Check/DD #	Check Date: 03/01/14; Total Amo			
>	Check/DD #	Check Date: 02/15/14; Total Amo			
>	Check/DD #	Check Date: 02/01/14; Total Amo			
>	Check/DD #	Check Date: 01/15/14; Total Amo			
>	Check/DD #	Check Date: 01/01/14; Total Amo			
>	Check/DD #	Check Date: 12/01/13; Total Amo			
>	Check/DD #	Check Date: 11/01/13; Total Amo			
>	Check/DD #	Check Date: 10/01/13; Total Amo			
>	Check/DD #	Check Date: 09/01/13; Total Amo			
>	Check/DD #	Check Date: 08/01/13; Total Amo			
>	Check/DD #	Check Date: 07/01/13; Total Amo			
>	Check/DD #	Check Date: 06/01/13; Total Amo			
>	Check/DD #	Check Date: 05/15/13; Total Amo			
>	Check/DD #	Check Date: 05/01/13; Total Amo			
>	Check/DD #	Check Date: 04/01/13; Total Amo			
>	Check/DD #	Check Date: 03/01/13; Total Amo			

You will find all HAP checks issued to you for the last 36 months.

There is a search engine to assist you in finding the information you seek. You can search by:

1. Check number (Figure 3-1).
2. A specific unit (Figure 3-2).
3. A date range (Figure 3-3).

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**My Payments**

Check/DD #:  Go Unit:

Check Date:  to

Check/DD #	Check Date	Description	Unit	Resident	Amount
▼	02/01/14	2/2014 HAP for [redacted]	[redacted]	[redacted]	[redacted]

To search by check number, type the check number in the space beside Check/DD #.

Click on the "Go" button.

Figure 3 – 1 – Search by check number

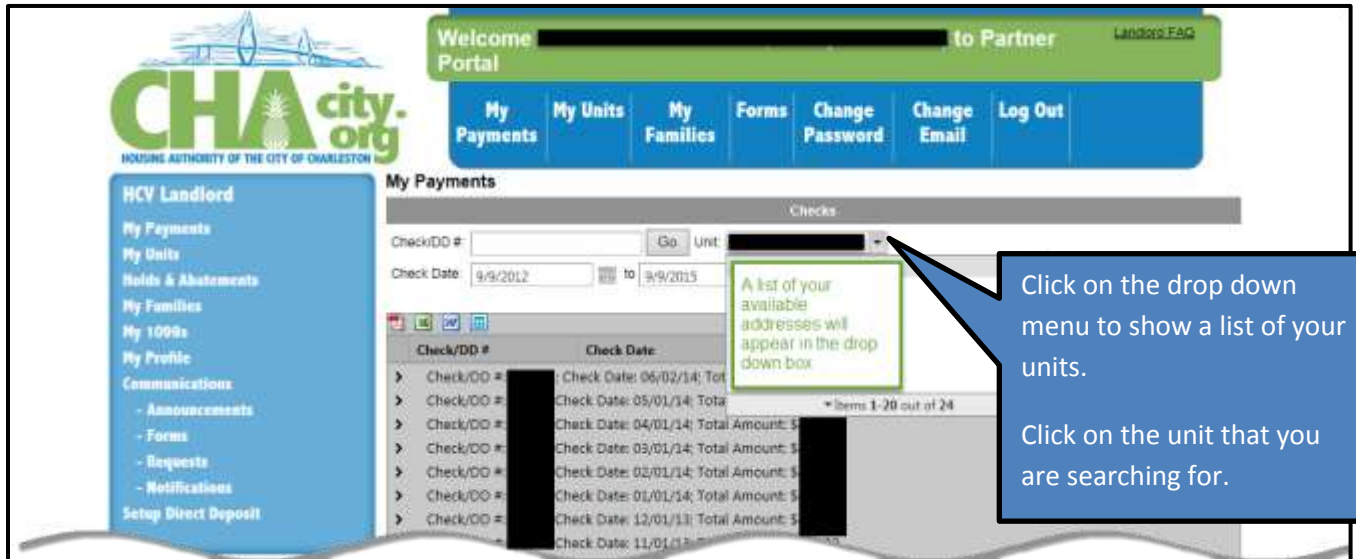


Figure 3 – 2 – Search by Unit

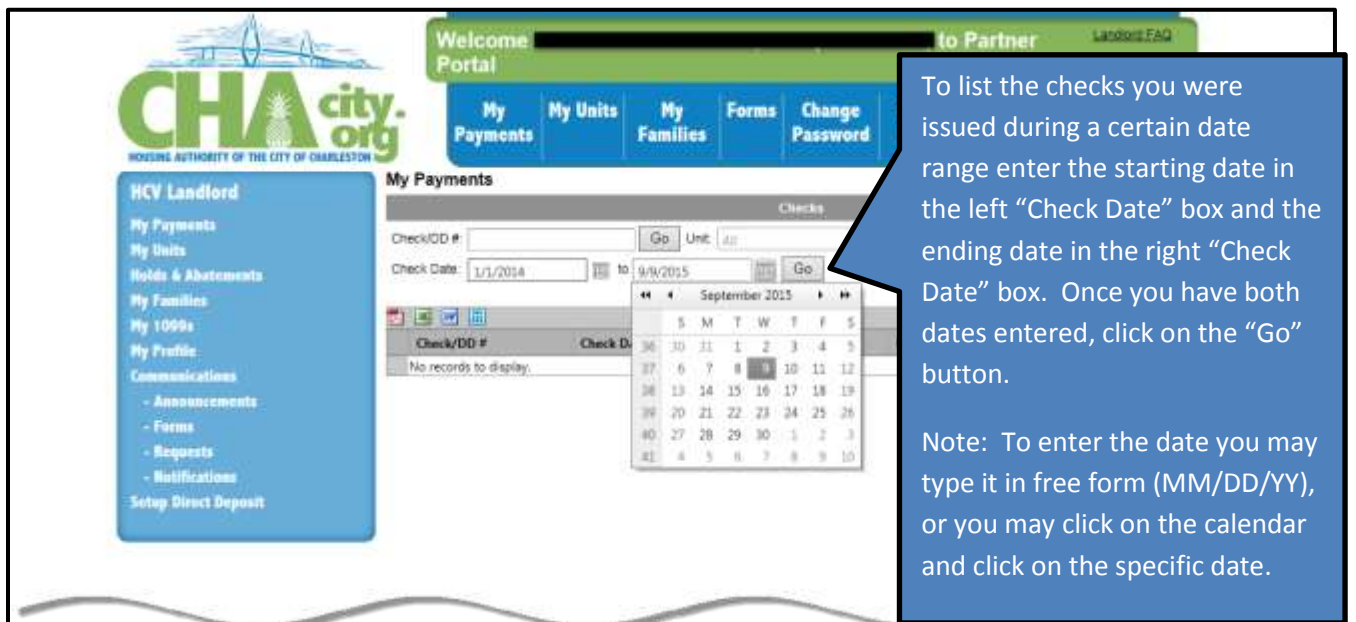


Figure 3 – 3 – Search by Date Range

#### 4. View Your Units (My Units)

Welcome [Name] to Partner Portal

My Payments My Units My Families Forms Change Password Change Email Log Out

My Units

Unit: All

Street	Suite#	City	State	Zip	Currently Housing Family	Is Available	Next Inspection
		Charleston	SC	29407	Yes	No	
		Charleston	SC	29405	Yes	No	
		North Charleston	SC	29420	Yes	No	
		North Charleston	SC	29405	Yes	No	
		Charleston	SC	29405	No	No	
		North Charleston	SC	29420	No	No	
		N. Charleston	SC	29406			
		N. Charleston	SC	29406			
		Charleston	SC	29405			
		Charleston	SC	29405			
		Charleston	SC	29407			
		Charleston	SC	29405			
		Charleston	SC	29405			
		Charleston	SC	29407			
		Charleston	SC	29405			
	6	Charleston	SC	29405			
		Charleston	SC	29405			
		Charleston	SC	29405	No	No	

Page size: 20 26 items in 2 pages

Click on the "My Units" link on the left side of the screen or on the top menu to search for and view a listing of your units.

Welcome [Name] to Partner Portal

My Payments My Units My Families Forms Change Password Change Email Log Out

My Units

Unit: All

Street	Suite#	City	State	Zip	Currently Housing Family	Is Available	Next Inspection
		Charleston	SC	29407	Yes	No	
		Charleston	SC	29405	Yes	No	
		North Charleston					
		North Charleston					
		N. Charleston					
		N. Charleston					
		Charleston	SC	29405	No	No	
		Charleston	SC	29405	No	No	
		Charleston	SC	29407	No	No	
		Charleston	SC	29405	No	No	
		Charleston	SC	29405	No	No	
		Charleston	SC	29407	No	No	
		Charleston	SC	29405	No	No	
	6	Charleston	SC	29405	No	No	
		Charleston	SC	29405	No	No	
		Charleston	SC	29405	No	No	

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Click on the magnifying glass icon to see more detail about the family, including members, etc.



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**My Units**

Unit: All

Street

Street	City	State	Zip	Currently Housing Family	Is Available	Next Inspection
North Charleston	SC	29420	No	No		
N. Charleston	SC	29406	No	No		
N. Charleston	SC	29406	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29407	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29407	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		
Charleston	SC	29405	No	No		

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**My Units**

Unit: All

Street

Street	Suite	City	State	Zip	Currently Housing Family	Is Available	Next Inspection
Charleston		Charleston	SC	29407	Yes	No	
Charleston		Charleston	SC	29405	No	No	
North Charleston		North Charleston	SC	29405	No	No	
North Charleston		North Charleston	SC	29405	No	No	
North Charleston		North Charleston	SC	29405	No	No	
North Charleston		North Charleston	SC	29405	No	No	
N. Charleston		N. Charleston	SC	29405	No	No	
N. Charleston		N. Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29407	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	
Charleston		Charleston	SC	29405	No	No	

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5. View Holds and Abatements (Holds & Abatements)

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**HCV Landlord**

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**Payment Holds & Abatements**

Past 36 Months of Payment Holds & Abatements

Unit: [dropdown] Type: All Status: All

Resident	Unit	Start Date	End Date	Status	Type	Notice	Certification
[redacted]	[redacted]	01/12/13					
[redacted]	[redacted]	11/30/13					
[redacted]	[redacted]	07/23/13					
[redacted]	[redacted]	06/05/13					
[redacted]	[redacted]	06/04/13	07/16/13	Closed	Hold/Exclusion	30 DAY NOTICE	Completed Certification

Click the "Holds and Abatements" link on the left side of the screen to view payment holds and abatements by unit, type or status.

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**Payment Holds & Abatements**

Past 36 Months of Payment Holds & Abatements

Unit: [dropdown] Status: [dropdown]

A list of your available addresses will appear in the drop down box.

Items 1-10 out of 24

Resident	Unit	Start Date	End Date	Status	Type	Notice	Certification
[redacted]	[redacted]	05/10/14	07/23/14				
[redacted]	[redacted]	09/06/13	10/30/13				
[redacted]	[redacted]	03/15/13	05/02/13	Closed	Hold/Exclusion	REPAIRS	Completed Repairs

Click on the drop down menu to show a list of your units.

Click on the unit that you are searching for.

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**Payment Holds & Abatements**  
Past 36 Months of Payment Holds & Abatements

Unit: All | Type: **All** (dropdown menu open showing Hold/Exclusion, Abatement)

Resident	Unit	Start Date	End Date	Status
[redacted]	[redacted]	06/04/14	08/05/14	Closed
[redacted]	[redacted]	05/19/14	07/23/14	Closed
[redacted]	[redacted]	09/06/13	10/30/13	Closed

Click on the drop down box for the specific type of Hold or Abatement you are looking for.

You can look at all the Holds & Abatements, just the Hold/Exclusion, or just the Abatements.

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**Payment Holds & Abatements**  
Past 36 Months of Payment Holds & Abatements

Unit: All | Type: All

Status: **All** (dropdown menu open showing Open, Closed)

Resident	Unit	Date
[redacted]	[redacted]	06/04/14
[redacted]	[redacted]	05/19/14
[redacted]	[redacted]	09/06/13
[redacted]	[redacted]	03/15/13

You may also search on the status of the Hold or Abatement.

Click on the drop down box beside the Status box.

Click on the status of the Holds & Abatements you wish to view: All, Open or Closed.

6. View your Families (My Families)

On the “My Families” screen, you are presented with a list of your tenant and their family members.

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My Families

Families							
Last Name	First Name	Street	Suite	HAP Amount	Next Re-exam Date	Move-In Date	Lease End Date
[redacted]	[redacted]	[redacted]		[redacted]	04/01/16	04/09/14	03/31/15

Click the “My Families” link on the left side of the screen or on the top menu to display a list of your tenants and their family members.

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My Families

Families							
Last Name	First Name	Street	Suite	HAP Amount	Next Re-exam Date	Move-In Date	Lease End Date
[redacted]	[redacted]	[redacted]		[redacted]	04/01/16	04/09/14	03/31/15
[redacted]	[redacted]	[redacted]		[redacted]	04/01/16	03/01/10	
[redacted]	[redacted]	[redacted]		[redacted]	03/01/16	03/01/10	03/31/11
[redacted]	[redacted]	[redacted]		[redacted]			15

Click on the magnifying glass icon to see more detail about the tenant, including members, Recertification dates, move-in dates, etc.

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My Families

Last Name	First Name	Suite	HAP Amount	Next Re-exam Date	Move-In Date	Lease End Date
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

You'll notice at the top of this grid, and every grid in partner portal, you have the ability to export to PDF, Excel, Word, or CSV.

7. View your 1099s (My 1099s)

You can find the last three years of your 1099s on the “My 1099s” screen.

Note: The housing authority will mail you a paper copy of your 1099 every year.

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My 1099s

Submission: 1099s

Payment Year: All

Account Number	Payee	Amount
[redacted]	Name: Charleston Housing Authority; Year: 2014; Address: [redacted]	\$ [redacted]
[redacted]	Name: Charleston Housing Authority; Year: 2013; Address: 550 Meeting Street	[redacted]
[redacted]	Name: Charleston Housing Authority; Year: 2012; Address: [redacted]	[redacted]

Click on the download icon to save your 1099 to your desktop or mobile device.

8. View your profile (My Profile)

On the "My Profile" screen you can view what the housing authority has on file regarding the following information:

1. User login
2. Name
3. Address
4. Phone number
5. Email address

9. Communications

There are four types of communication available for a landlord.

- a. Announcements - This is how the housing authority will communicate with all landlords/owners. You will receive an email if a new announcement is made.

	Title	Text	Timestamp
🔍	ACCEPTING APPLICATIONS	TEST: ...	3/16/2015 3:03:00 PM
🔍	Test 6	Test	8/14/2015 2:56:00 PM

Click on the magnifying glass icon to see the alert.

b. Forms - Any forms that the housing authority has available for download can be found here.

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Forms

Description	Download Form
Change of Landlord Form	[Download Icon]
Landlord W-9	[Download Icon]
Utility Allowance Townhouse 2015	[Download Icon]
Utility Allowance Single Family 2015	[Download Icon]
Utility Allowance Duplex 2015	[Download Icon]
Utility Allowance Apartment 2015	[Download Icon]

Click on the download icon to Save your icon to your computer or mobile device.

c. Requests

You can create a request for the housing authority by clicking on the requests screen.

Request Date	Request Type	Request Status	Days Since Request
[New Document Icon]			
11/13/14 3:28:46 PM	Miscellaneous Request	Active	0

Click the "New Document" button.  
You will be taken to the New Request screen (Figure 9).

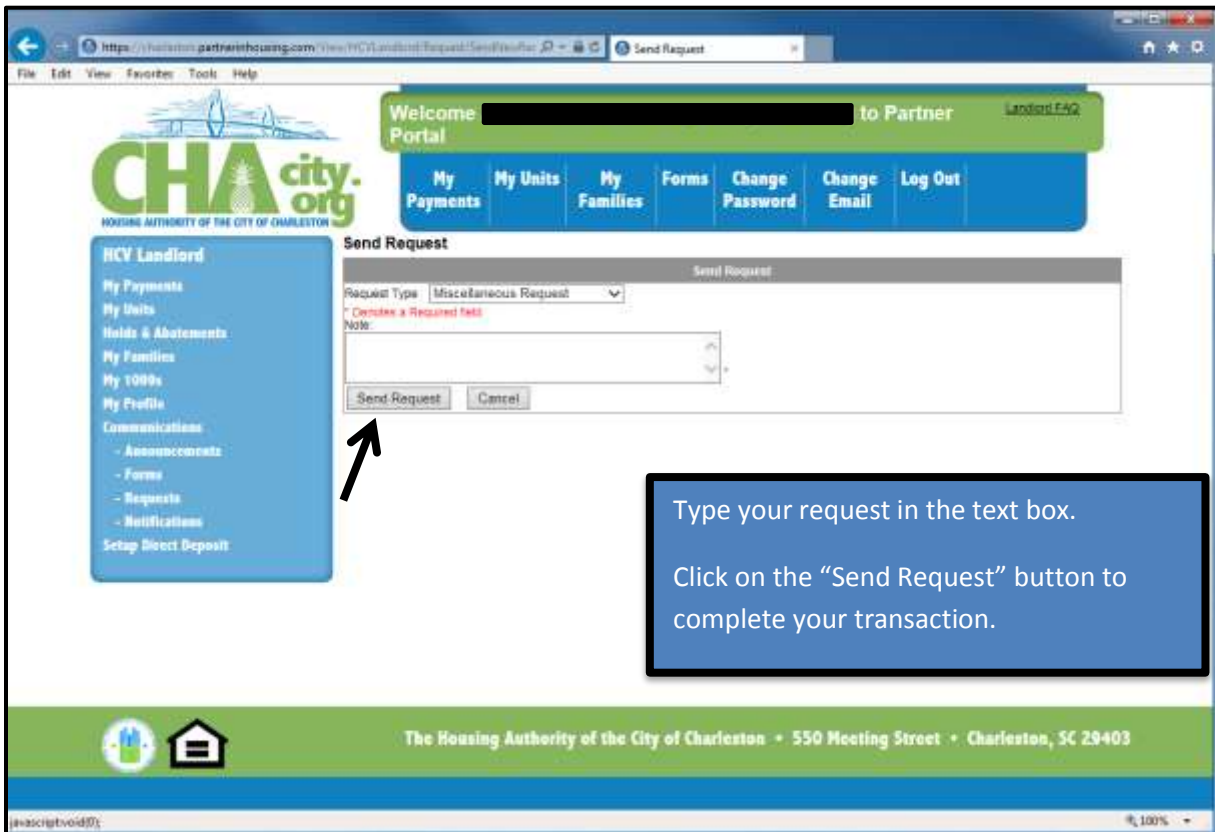
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Figure 9 – New Document

Select the type of request you wish to make:

1. Business Name – if you need to change your business name
2. Personal Information – for any changes to your personal information such as address or phone numbers. If you need to change your direct deposit information you will need to come to the housing authority.
3. Tax ID – if you need to request a change of your Tax ID.
4. Miscellaneous Request – anything not covered under the other choices.
5. Rent Increase – if you wish to change the rent amount on one of your units.
6. Rent Issues – Any rent issues you may have in regards to the unit or tenant.
7. Repairs Completed – to let the HCV Inspectors know that the repairs to a unit have been completed.



Type your request in the text box.  
Click on the "Send Request" button to complete your transaction.



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Welcome [redacted] to Partner Landlord F&G

My Payments | My Units | My Families | Forms | Change Password | Change Email | Log Out

HCV Landlord

- My Payments
- My Units
- Holds & Abatements
- My Families
- My 1099s
- My Profile
- Communications
  - Announcements
  - Forms
  - Requests
  - Notifications
- Setup Direct Deposit

My Requests

Request Date	Request Type	Request Status	Days Since Request
9/2/2015 5:38:48 PM	Miscellaneous Request	Active	0

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Once you have completed entering your request, all your requests will be displayed in the screen and you will be able to view the status of your requests.

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Welcome [redacted] to Partner Landlord F&G

My Payments | My Units | My Families | Forms | Change Password | Change Email | Log Out

HCV Landlord

- My Payments
- My Units
- Holds & Abatements
- My Families
- My 1099s
- My Profile
- Communications
  - Announcements

My Requests

Request Date	Request Type	Request Status	Days Since Request
9/2/2015 5:38:48 PM	Miscellaneous Request	Reviewed	0

After the housing authority has approved or denied your request, the status will change from "Active" to "Approved," "Denied" or "Reviewed."

**Request**

Request

Request Type: Miscellaneous Request  
 Request Status: Reviewed  
 Request Date: 9/2/2015 5:38:48 PM  
 Landlord Note: Test: Please change the tax ID to 51-322xxx1.  
 Housing Authority Note: You will need to call the office to get the special form.

OK

When the housing authority has changed the status of your request you will receive an email.

d. Notifications

Notification Events allow you to choose when you are notified.

Note: This action will take approximately 24 hours to take effect.

The screenshot shows the CHA city.org Partner Portal interface. At the top, there is a green header with the CHA logo and a navigation bar with links: My Payments, My Units, My Families, Forms, Change Password, Change Email, and Log Out. Below this is a blue sidebar menu for HCV Landlord with options like My Payments, My Units, Holds & Abatements, My Families, My 1099s, My Profile, and Communications. The main content area is titled 'Notification Events' and contains a table with columns 'Enabled' and 'Text'. The table lists various notification events, each with an unchecked checkbox in the 'Enabled' column. A blue callout box with a white border points to the first checkbox and contains the text: 'Place a checkmark in the box beside the type of issue/situation you wish to be notified.' Another blue callout box points to the 'ACTIONS' button in the top right corner of the table and contains the text: 'Ensure you click on the Save icon when you have completed all your changes.'

Enabled	Text
<input type="checkbox"/>	Notify me 7 days prior to inspection scheduled date.
<input type="checkbox"/>	Notify me when [unclear] status completed.
<input type="checkbox"/>	Notify me 60 days prior to [unclear]
<input type="checkbox"/>	Notify me after a failed inspection aban.
<input type="checkbox"/>	Notify me after a payment has been processed.
<input type="checkbox"/>	Notify me when SB annual or interim certification is approved and
<input type="checkbox"/>	Notify me when 1099 batch is submitted
<input type="checkbox"/>	Notify me when 1099 information is available on Partner Portal
<input type="checkbox"/>	Notify me when a batch correspondence email is created

# DIRECT DEPOSIT

The screenshot shows the CHA city.org Partner Portal. At the top, there is a green banner with the text "Welcome [redacted] to Partner Portal" and a "Landlord FAQ" link. Below this is a blue navigation bar with buttons for "My Payments", "My Units", "My Families", "Forms", "Change Password", "Change Email", and "Log Out". On the left side, there is a blue sidebar menu for "HCV Landlord" with options like "My Payments", "My Units", "Forms", "Requests", and "Setup Direct Deposit". A black arrow points to the "Setup Direct Deposit" option. The main content area shows a "My Payments" section with a "Checks" sub-section. It includes a search form for "Check/DD #", "Check Date" (8/20/2012 to 8/20/2015), and a "Unit" dropdown. Below this is a table of payment records with columns for "Check/DD #", "Check Date", "Description", "Unit", "Resident", and "Amount". A blue callout box with white text says "Click on 'Setup Direct Deposit.'" and points to the sidebar menu.

The screenshot shows the "Direct Deposit Sign Up" form. The title is "Direct Deposit Setup Form". On the left, there is a list of fields to be filled out: Tax ID, Business Name, File Name As, First Name, Middle Name, Last Name, Email Address, Telephone, Street, Suite, City, State, ZIP, Payment Group, Account Type, ABA/Transit Number, Account Number, ACH Individual ID, and ACH Individual Name. The form fields are partially filled with redacted information. A dropdown menu for "Default Payment Gro" is open, showing "Checking Account" selected and "Savings Account" as an option. A red callout box with white text says "Click on the dropdown box to select the type of account you want your payment to be deposited to." Below the form, there is a preview of a check stub. The check number is 1025. The routing number is 101010011 and the account number is 055100511510. Red arrows point from these numbers to labels below: "[ ABA/Transit Number ]" and "[ Account Number ]". At the bottom left, there are "Sign Up" and "Cancel" buttons.

