Manage Agencies

If a participant's care is paid partially or in full by an agency, add the agency to the participant's account. Adding or updating agencies on the Participant Account Details page only updates accounting information for that contact. Enrollment information is not affected.

Agencies can be at one of the following statuses:

- **Agency Payer:** This agency can pay invoices.
- **Inactive:** This agency is no longer a payer on the participant account.

You can also split payments between contacts and agencies. For more information, see **Manage Payment Settings**.

> **In this article:**
> - Add Agencies
> - Edit Agencies
> - Set Agencies to Inactive
> - Remove Agencies

Add Agencies

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
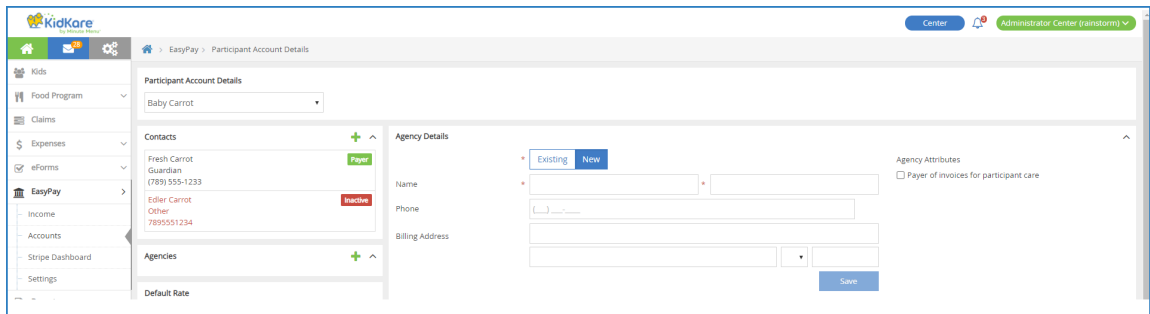

3. Click the drop-down menu at the top of the page and select the participant for whom to add an agency.
4. Click ➕ in the **Agencies** section to the left.
5. In the **Agency Details** section:

> **Note:** If this section does not display, click ⌄ to expand it.

    a. Click **Existing** or **New**. If you select Existing, you can select an agency previously. This is useful if one agency pays invoices for multiple participants.

    b. Click the **Name** boxes and enter the agency representative's first and last name.

    c. Click the **Phone** box and enter the agency's phone number.

    d. Click the **Billing Address** boxes and enter the agency's billing address.

6. In the **Agency Attributes** section, check the **Payer of Invoices for Participant Care** box.

7. Click **Save**.

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Edit Agencies

You can update agency details at any time. Remember, adding or updating agencies on the Participant Account Details page only updates accounting information for that contact. Enrollment information is not affected.

1. From the menu to the left, click **Accounting**.

2. Click **Accounts**. The Participant Account Details page opens. The Participant Account Details page opens and displays information for the last participant you viewed.

3. Click the drop-down menu at the top of the page and select the participant for whom to manage agencies.

4. From the **Agencies** section to the left, click the contact to change. The **Agency Details** section displays the current information for this agency.

> **Note:** If this section does not display, click ⌄ to expand it.

5. Click each box in the **Agency Details** section, and enter new information over the existing information.

6. Update your selections in the **Agency Attributes** section, as needed.

7. When finished, click **Save**.

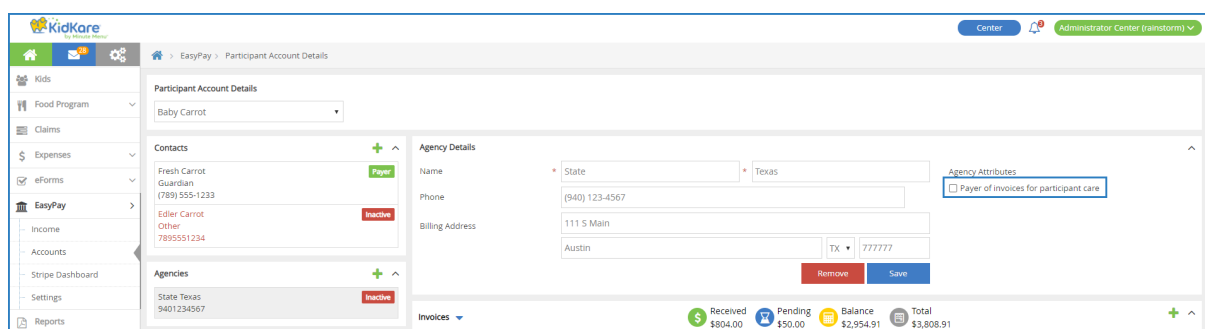[Return to Top](#)

Set Agencies to Inactive

When you set an agency to inactive, it means they are no longer a payer on the participant account. For example,

if an agency is no longer paying for a Participant A, but is paying for Participant B, you would set that agency inactive for Participant A.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to manage agencies.
4. From the **Agencies** section to the left, click the contact to change.

    > **Note:** If this section does not display, click ⌄ to expand it.

5. In the **Agency Attributes** section, clear the **Pays Invoices for Participant Care** box.
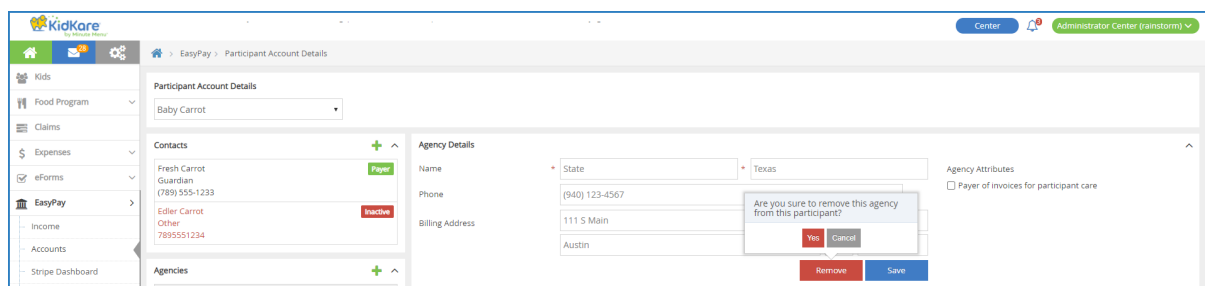

6. When finished, click **Save**. The agency is set to inactive for this participant.

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Remove Agencies

To remove an agency from a participant account:

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to remove an agency.
4. In the **Agencies** section, select the agency to remove. Their information displays in the Agency Details section.
5. Click **Remove**.

6. At the **Are You Sure** prompt, click **Yes**. The agency is removed.