



ACCESS PFC - INSTRUCTIONS

Enter login information.

Client ID: PFC Client Number
User Name: First Initial plus Last Name
Password: Initial password will be 'password.'

Click Login

After initially logging on you will be immediately prompted to change your password to your preference. Your password must be at least four characters in length.

You will now be logged into the main screen. At the top of the page you will see your menu options. These options include: Account Inquiry, Reports, New Account Entry, Client File Upload, Edit Users, View Submitted Accounts, Message Center.

Note: When navigating this site clicking on any information in blue text will allow you a more detailed view of the information you are accessing. In addition, hovering your cursor over an item will show you a brief description of that item.

Account Inquiry

This option gives you the ability to look up a single account. To search for an account you can use your account number, name, phone, SSN, or a variety of custom fields. Once you have the information entered click search and all accounts listed by that information will be generated. If there is only one account the additional information for this account will be displayed. If there is more than one account a list of accounts will be displayed. To choose the account that you want to view just click on the last name.

This inquiry will show: demographic information, amount assigned, current balance, status, status description, assigned date, and last pay date. You also have the ability to report payments or submit updated account information by clicking on 'Report Payment' or 'Edit Account' in this option.

Reports

The following types of reports are available in the reports menu: Statistics by Account Status, Full Inventory, Legal Inventory, Owing Inventory.

Note: All reports have the ability to be exported into a text file or spreadsheet.

Statistics by Account Status: Groups accounts by their status in our office. By clicking on the account status code you will see a list of all accounts under that status.

Full Inventory: Lists by name all accounts placed in our office. Click on an individual's name to see more information.

Legal Inventory: Lists accounts in legal status.

Owing Inventory: Lists outstanding accounts.

New Account Entry

This allows you to send a new account to our office. When you click on New Account Entry you will see a form to fill out with the individuals that you want to send to our office. After filling out the required fields and any additional information you may have, click submit and the account will be sent to our office for placement.

Client File Upload

This option allows you to send files to our office. For example: You can upload a spreadsheet of several accounts that you want to turn, send itemized statements, etc.

Edit Users

Gives you the ability to add users that you want to have access to this site.

Note: When you authorize additional users at your facility to access your data, it is your responsibility to delete said users when permission to access has expired.

View Submitted Accounts

View pending accounts you have submitted to us through this site.

Message Center

Send messages to our office or receive messages from our office.