

TED BILL Vendor Profile Setup Guide Direct: 1.866.252.6871 | Fax: 1.888.272.2236 Open a Customer Service Ticket: <u>https://felloselfdirection.zendesk.com</u> Website: www.fello.org/selfdirectedservices

As a vendor or participant team member submitting payment requests, you will have an account set up in <u>BILL</u> so that invoices or reimbursements can be processed. By default, payments are processed as paper checks, but you may connect with your BILL profile and set up e-payments for more timely payments. You can also review what payment requests are currently outstanding and what payments have already been made.

Setting up your Profile and E-Payment Information

As soon as Fello receives your first invoice and the necessary onboarding documents, we will create your vendor profile and send you an invitation to connect with BILL.

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⊳	Sent			☆ Google Pay		Your annual notice about	our cust	omer service and e	error resolution	policy - Learn

Note: This e-mail may be captured by your Spam or Junk filter, so you could need to check these folders for the invitation.

Once the email is received, click "Sign up for ePayments" to create your BILL account:

Hello,	
Good news, Fello , Inc. Self-Directed Services wants to start paying you electronically using BILL. Create a subscription-free BILL account to get ePayments for your invoices.	
Message from Fello, Inc. Self-Directed Services	
Please accept this invitation from Fello, Inc. Self-Directed Services to start receiving electronic payments directly to your bank account. This is our preferred method for making payments, and it's completely free to you.	
This way you will get paid much faster, and all invoice details will be available online in your free account for quick and anywhere access, helping you cut down on paperwork.	
And don't worry, your account information will be secure, protected with bank-level encryption, and not visible to Fello, Inc. Self-Directed Services.	
Sign up for ePayments	

Fill in your first and last name then create a password for your profile.

Set up your security verification through a text or phone call.

You will be asked if you would like to use other features in BILL. Select "Skip This Step."

Next you will be asked what your relationship is to **Fello**, **Inc. Self-Directed Services**. Please select the appropriate option based on your business and the payment requests you will submit.

All vendors <u>submitting payment requests for disbursement</u> that will be captured on a 1099 tax form should select "<u>I'm with a business</u>" or "<u>I'm an independent contractor</u>."

You may be asked to clarify your business type, but can select the following options:

- Business type: Individual
- Industry: General Service Based Business
- Accounting software: I don't use accounting software

Individual	\sim	General Service Based Busi ∟
accounting software	*	

All employees or team members seeking reimbursement payments that will not appear on a 1099 tax form should select "<u>I'm none of the above</u>."

Complete the following page with your basic information such as social security number or Tax ID, phone number, and mailing address.

Business name or	legal full name	
Required		
This company has a	an alternate name	
Vendor location		
United States O	International	

Add your bank information. Please be aware that this information is encrypted and will not be visible to The Fello team.

Navigating your BILL

With setup complete, you will now be able to log in to BILL and review your payment requests.

The **Overview** tab will show you a summary of what invoices are currently open, as well as a summary of what payments have been sent to you.

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The Invoices tab will list each payment request that has been processed or is being processed.

You can click on each invoice to review the details and any documents that might be attached.

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The **Payments In** tab will display each payment that has been sent to you or is currently incoming to your account.

Actions *	←	Payments In
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