Finance Portal Instructions for the New IDEAS Database

Step 1. Add a Finance User to the New IDEAS Database

1. Practice Administrators must login to the New IDEAS portal (https://app.ideas-study.org/) to add a Finance User.
2. Select to "Practice Management" and "Practice."
3. Scroll down to Registrars section and click "Add Registrar"
4. Click on "Add New Registrar" (green rectangle).
5. Fill in the information and select "Finance User" in the user type drop down.
6. Click submit.

Step 2. Finance Users Activate Account in New IDEAS Database

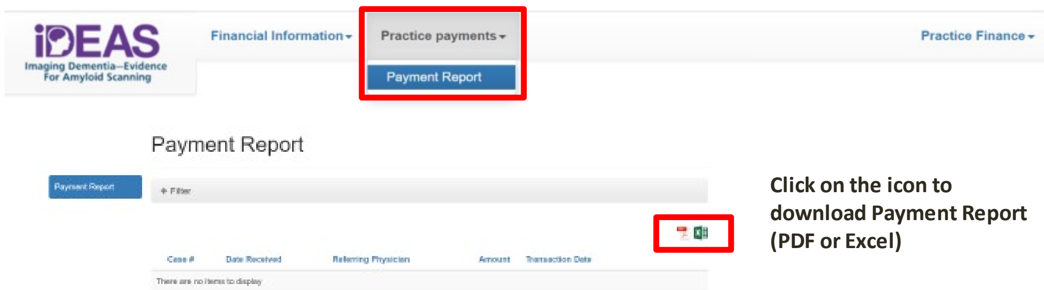
1. The assigned Finance User should look for an email from New IDEAS database. Click on the secure, longer hyperlink at the very bottom of the email.
2. If you have not done so already, create an ACR ID. If you have an existing ACR ID for New IDEAS, sign in with ACR ID.
3. Navigate to https://app.ideas-study.org/ and login with your account information.

Step 3. Update Banking and Finance Information in New IDEAS Database

1. Follow the steps in the slides below to enter banking information.

Finance Portal: View Practice Payments

- Practice Finance Users can access practice payments at any time via the "**Practice Payments**" Tab.
- Select "**Payment Report**" to view list of payments by case number or download a pdf or excel report of payments.



Click on the icon to download Payment Report (PDF or Excel)

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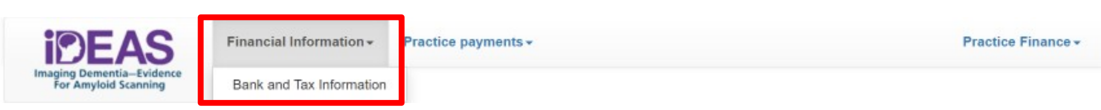
Finance Portal: Add Financial Information

- After logging in to the New IDEAS portal, Finance Users should select the " **Financial Information**" Tab, and select " **Bank and Tax information**"
- Bank and Tax Information Overview:
  - Bank Detail
  - W9 Request for Taxpayer Identification Number and Certification
  - Part 1 Taxpayer Identification Number
  - Part 2 Certification
  - Name of Institutional Official
  - Name of Person Submitting Form



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