HCF Program Account Holder Guide

The Rural Health Care (RHC) Program recommends having more than one account holder for each health care provider (HCP). This guide will show you how to add a secondary or tertiary account holder to your HCP. Please note that only Primary Account Holders have access to the “Account Holders” tab in My Portal.

Step 1: Log in
Log into My Portal with your username (email address) and password.

Step 2: Select Applicant Type
Select the applicant type for which you’d like to assign an account holder. For this guide, we will be selecting “Individual Applicant - Healthcare Connect Fund (Forms 460, 461, 462, 463)” but the steps to add an account holder are the same for both individual and consortium applicants.
Step 3: Select Individual HCP Number

After selecting your applicant type, you will be directed to a page with two tabs. Select the “Account Holders” tab. Please note that only Primary Account Holders have access to the “Account Holders” tab.

Step 4: Add New Account Holder

Click on the “Add New Account Holder” button to assign additional account holders.
Step 5: Assign Additional Account Holder to HCP

- If the additional account holder has participated in the RHC Program before and already exists in our system, use the “Search By (Email)” option. Enter the email address, click “Search,” and the required fields will automatically populate.
- If the additional account holder has not participated in the RHC Program before and does not exist in our system, manually enter the person’s information in the required fields.

To add the additional account holder to an HCP, select the correct role in the “Role” column of the HCP number. You can add the additional account holder to one or multiple HCPs at the same time.

- Secondary Account Holder: Must be an employee of the legal entity.
- Tertiary Account Holder: A third party hired to file forms on behalf of the HCP. Must have a valid Third Party Authorization (TPA).
Once the correct role is added, the “Add Account Holder” button will highlight. Click the “Add Account Holder” button to add the additional account holder to the HCP(s).

Once you have added the additional account holder to the HCP, the person will have the ability to access and make changes to the HCP by logging into their personal My Portal account.

**Step 6: Confirm Successful Addition**

Select the “Account Holders” tab, as mentioned in Step 3. The additional account holder will appear in the list of account holders. Any new account holders will receive an automatically generated email notification with information on accessing their personal My Portal account.