

FAQs

Portal Overview

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| <p>How do I find my client number? What is the difference between my client number and my master client account?</p> | <p>Your client number is available on your FORVIS invoice, or you can reach out to FORVISOnlinePayments@forvis.com and they will provide your client number.</p> <p>The master client number is the number FORVIS uses to “relate” all your clients so that we can pull a report of all your clients with one number.</p> |
| <p>Can I use my MC client number to pay all the invoices in the related clients in one process?</p> | <p>Absolutely, that is the beauty of this system. You can pay invoices across all your clients, split them, and use your payment method of choice to pay them quickly and easily.</p> |
| <p>Do I have to use this payment portal?</p> | <p>No, this is a new payment opportunity to serve our customers, but all existing payment methods are still available.</p> |
| <p>Is it secure and will my data be saved on the site?</p> | <p>Your data security is of the utmost importance to us, which is why we are partnering with Wells Fargo to host this payment portal. Your data and payment methods will never be saved on the platform.</p> |
| <p>Will I be able to see a copy of my invoice in the portal?</p> | <p>You will only be able to see your invoice amounts on the portal. To see a copy of the invoice, please contact your engagement partner/manager or the FORVISOnlinePayments@forvis.com.</p> |
| <p>Will I be able to communicate with my FORVIS client team through the portal?</p> | <p>This portal is designed for payments. If you wish to contact your engagement team, please reach out via email, or phone call.</p> |
| <p>Can I leave a comment for the FORVIS team within the payment portal?</p> | <p>There is not a place to leave comments or questions directly within the portal, however you can click ‘Contact FORVIS’ at the bottom of the portal to contact FORVIS via email or phone.</p> |
| <p>What is the difference between this portal and MyFORVIS?</p> | <p>This portal serves as an online payment portal so that you can pay your bills online efficiently. MyFORVIS is the client portal to communicate and securely transfer information with your client engagement teams. A great benefit of having a separate payment portal is that you can give your billing team this information to manage invoices without granting access to all your account information in MyFORVIS.</p> |
| <p>Who has access to look at this information and pay the bill?</p> | <p>Only those people who you’ve shared the login information with can access the portal. Your FORVIS client engagement team is not able to log in to this portal on your behalf.</p> |

Payment and Processing

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| What credit cards are accepted? | All major credit cards are currently accepted. |
| Why do I have to pay a surcharge for credit card payments? | If you pay via credit card, you will have a surcharge of approximately 3% added to your payment. The surcharge is not greater than the cost of acceptance and covers processing fees associated with credit card payments. |
| If I pay via debit card, do I have a surcharge? | If you use your debit card, you will <i>not</i> be charged a surcharge. |
| How do I see if I have a credit on file? | You can check if you have a credit on file by updating “Unpaid and Partially Paid” on the screen where all your invoices are listed to “All.” Please remember to change back to “Unpaid and Partially Paid” when you are done. |
| If I have a credit on file, how do I get that applied to an open invoice? | You can reach out to FORVISOnlinePayments@forvis.com and they will apply the credit to the requested invoice. This may take up to 48 hours to process. |
| If I wish to split my payments between two payment methods, how can that be done? | You would process your payment with the first payment method with the amount you wish to allocate and once you submit that payment, you would go back to the main screen and start a new transaction using your next payment method. You will receive confirmation for both completed transactions. |
| Can I see my payment history? | The payment option is primarily available to make new payments; if you would like to see a history of your payments or a statement, please contact your client service team. |

Support

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| How long does it take for the Service Desk to respond to my query? | Our goal is to respond within 24 hours; however, response times can increase during peak seasons. If it is an emergency, contact your client engagement partner/manager directly for assistance. |
| When should I reach out to the Service Desk? | You can reach out to FORVISOnlinePayments@forvis.com for: <ul style="list-style-type: none"> • More information on how to use the payment portal • Assistance logging in to the portal • Locating a client number or zip code • Applying a credit that is on file • Requesting a refund for a credit on file • Requesting a copy of an invoice • Billing questions |
| What happens if we move and the address and billing zip code on file are no longer valid? | If you need to update any of your account information, please email your engagement team at FORVIS to update account information. It will take one business day to update our system. |

