CLIENT PORTAL USER GUIDE
(updated 12/4/2022)

Logging In to Portal:

1. Go to https://client.silverbills.com/login
2. On the log in page, type your username or email, enter your password and click the enter key.
3. You are now in the SilverBills Client Portal.
4. If you have 2-factor authentication established, enter the 7-digit number from the Authy app and click the enter key, and you will be in the SilverBills Client Portal.

Portal Tabs:

1. Personal Info – this tab contains all the Client's personal information.

2. Financial Info – this tab contains the Client's bank information, and if the Client has a Pooled Income Trust, then also the PIT information.

3. Trusted Contact – this tab shows the contact information for the person or people you have declared to be a Trusted Contact, who may be a family member, friend, caseworker, home health aide, or other person. The Trusted Contact may also be your designated Power of Attorney. SilverBills Account Managers may discuss your accounts generally with your Trusted Contact, but the Trusted Contact may not provide SilverBills with directions as to whether the account should be paid. Only your Power of Attorney may discuss account details with SilverBills.

4. Accounts – this tab shows each of your accounts that SilverBills is managing each month, with columns showing details about each account such as the account number and the statement date. A red star shows that there is a statement posted but not yet paid, likely because the payment date has not occurred.

   a. To view any account, click on the View/Edit button on the far right side of the page. Once you click into any one account, you will see some of the same details as on the Accounts tab summary page. The monthly statements are posted towards the bottom of the page for each account.

b. To view a specific Account Statement, scroll down the page until you find the Account Statements section. Click on a specific Statement date, such as Verizon_11_15_2022, and a window will pop up with a copy of that Statement.

c. If you have a Pooled Income Trust, you can see the Trust Submission Document in that section of the Account page by clicking a specific document name as you did for the Account Statement.

d. There are additional sections on the Account page that contain Payment Receipts, Communication Documents, Other Documents, if any such documents have been uploaded to the Account page. Click on the specific document you wish to view.

5. Team – this tab shows the name of your Account Manager, Secondary Account Manager and Account Executive managing your monthly bills.

6. Payments – this tab shows each payment marked on your Accounts each month and is listed in reverse chronological order of Payment Date.

7. Bank Info – if you have provided log in credentials to your Account Manager for your checking account, this tab may show recent transactions in your bank account.

8. SilverBills Documents – this tab contains the documents connected to your accounts generally. There are sections showing your Bank Statement, Correspondence, DFTA Documents if you are a DFTA client, Miscellaneous documents, a copy of the SilverBills Service Agreement and any Amendments, Trust Documents if you have a Pooled Income Trust, and the SilverBills Monthly Reports. Unsorted documents are those documents you mail to SilverBills that have not yet been processed by the Account Manager.

9. Personal Documents – this tab may contain any documents you have uploaded for safe keeping or for your Account Manager to process. If you are using this tab, please inform your Account Manager when you upload new documents.

10. Analytics – this tab shows the current monthly payment activity for your Accounts. You can click on the various fields to change the month or year, or to generate a report for a quarter, year or custom dates.

11. Settings – This tab is for SilverBills use when setting up your account pages.

Logging Out of Portal:

To log out of the SilverBills portal, click "Logout" located in the upper right corner of any page. If you are logged in but inactive for 15 minutes, the portal will log you out automatically. To log back in, click anywhere on the page and it will take you back to the Log In page.