



## THE POWER OF BEING UNDERSTOOD

# RSM PAYMENT PORTAL FAQ

## Q. What is the RSM Payment Portal?

- A. The RSM Payment Portal allows users to pay invoices using a Web based user interface.

## Q. What are the benefits to use RSM's Payment Portal?

- A.
1. Convenience: available 24/7-365 days a year.
  2. Accessibility to your information:
    - a. All your open invoices will be at your finger tips.
    - b. All your payments made via the portal can be viewed.
    - c. Single sign on for all linked accounts, and the capability to view those accounts in one screen.
  3. Ease of payments:
    - a. Secured through the portal.
    - b. Ability to pay across linked accounts in one payment.
    - c. Save payment information for future use.
    - d. The ability to set up auto payment/recurring payments
  4. Ease of communication with RSM.
  5. Export portal payment history, open and closed invoices.

## Q. What is our intent going forward?

- A.
- After our pilot, RSM will begin the roll out to our commercial clients, and then finally to all of our consumer clients. We look forward to you continuing to utilize the portal after our pilot.
  - This is just step one for RSM as it relates to portals, as we continue to work to enhance your client experience.

## Q. What is my user name to access the RSM Payment Portal?

- A. Your email address.

## Q. How do I access the RSM Payment Portal?

- A. The process begins after receiving an email with a link to activate the RSM account. Or, [click here](#) to access the portal.

## Q. How do I access the portal and what link should I mark as a favorite?

For U.S. go to: <https://clientpaymentportal.rsmus.com>

For Canada: <https://clientpaymentportal.rsmcanada.com>

## Q. What if I forget my password?

- A. Click **Trouble Signing On**, found on the RSM Payment Portal log in screen to launch password recovery. Enter you email address and click **Send Request** to initiate the password reset process.

## Q. How do I activate my account?

- A. You will receive an activation email. Click **Activate Your Account**. Enter the desired password, then re-enter the password. Select a security image and click **Create My Account**. Enter your RSM email and click **Next**. Enter your RSM password and click **Sign in**. Click **Send me the Code**. Copy and paste the verification code into the box provided Click **Verify**. Click **RSM Payment Portal** to open.

## Q. What if I have questions concerning my account?

- A. Contact RSM Accounts Receivable at **608-270-6950 (U.S.) or 647-730-3714 (Canada)**. Or, email at [AccountsReceivable@RSMUS.com](mailto:AccountsReceivable@RSMUS.com).

## Q. What if I have questions concerning logging into my account or need technical support?

- A. Contact RSM Support at (1-833-518-3394) or email at [RSMServiceDesk@rsmus.com](mailto:RSMServiceDesk@rsmus.com). Current support hours are 7am-7pm Central time Monday-Friday.

## Q. Are there any disclaimers when I begin to use the RSM Payment Portal?

- A. Yes. Please note the following disclaimers:
- **Disclaimer for open invoices:** This portal does not contain invoice copies for any invoice issued before April 16, 2021. Invoice copies can be obtained by emailing [AccountsReceivable@rsmus.com](mailto:AccountsReceivable@rsmus.com).
  - **Disclaimer for closed invoices:** This portal does not contain data prior to April 16, 2021. As such, invoices closed prior to that date are not be displayed on this tab.
  - **Disclaimer for payment history tab:** This tab only displays payments made through this portal. Any payments made directly to RSM will not be reflected here.