

Vincent Guardian / Parent addition

Tutorial of the changes included in this release

Why a Guardian / Parent field is being added

- Requirements from the bank now prevents a card being directly assigned to a payee under 13 years of age.
- There is a need for Vincent to have the ability to support adult payees that have legal guardians or a power of attorney to be able to control the balance for the payee.

Details on the Guardian / Parent field for payees under 13 years of age

- If a payee under 13 years of age is already in Vincent, the system will prevent payments from being able to be made if no Guardian / Parent is added to their profile. Once a Guardian / Parent is added to the profile payments will be able to be processed.
 - The card will be registered under the Guardian / Parent. The Guardian / Parent will have control of the card and money for the payee that is under 13 years of age.
 - The payment will be made and reported for the payee.
- Adding a Guardian / Parent is required for new payee creation for payees under 13 years of age. The save button is not accessible during new member creation and cannot be completed until a Guardian / Parent is added. Once a Guardian / Parent is added the save button will be accessible and member creation can be completed.

Details for payees over 13 years of age.

- A Guardian / Parent is optional for payees **over** the age of 13 years old.
 - Proper documentation needs to be held internally at the group or department level.
 - Typical reasons a guardian/parent may be voluntarily added to a profile include:
 - Adult payees that have a person with power of attorney
 - Payees with developmental or cognitive issues where they need assistance with using a card
 - A payee that passed away and the group determines that a family member can access the balance, etc.
 - Minors over 13 years of age that the group determines the parent should control the card.

Other details about the Guardian / Parent field

- The Guardian / Parent is not searchable in the Vincent system. The information for the Guardian / Parent will be available in the payee profile of the payee with the Guardian / Parent added.
- The card will be assigned in the Guardian / Parent name and the Guardian / Parent will control the money for the payee when a Guardian / Parent is added to the payee profile in Vincent.
- The payment is made to the payee and the payment will be reported to the payee and not the Guardian / Parent.
- If the Guardian / Parent has an independent payee profile for their own groups, then the Guardian / Parent could have multiple cards in their name. They would have one card for their own personal payee profile and would also have an individual card for each payee they are registered as a Guardian / Parent with.
- All documentation of payees with a Guardian / Parent should be held internally at the department or group level.
- A payee can only have one Guardian / Parent added to the profile.
- The Guardian / Parent needs to be over the age of 18 years of age. If the Guardian / Parent is under 18 years of age, then it cannot be added to the Vincent system by the user. If an exception needs to be made, the request will need to be emailed to support at pittvincentaccess@pitt.edu and the support team will complete the process. All required fields will need to be included in the request.

Layout of the new payee screen with a Guardian / Parent added.

- Example without Guardian / Parent added

The screenshot displays a mobile application interface for a payee profile. At the top, the name "Rob Holding" is shown next to a back arrow and an "Edit Member" button. Below the name, the profile information is organized into three columns: "Date of birth" (January 1, 1998), "Gender" (Male), and "Address" (111 Lane Street, Irving, TX 77664). A "Payee" role is indicated with a shield icon. A prominent yellow warning box states "SSN Not Provided" with the note "Non-waiver groups will have taxes withheld". A pink banner at the bottom of the profile section prompts the user to "Assign a card to make a payment" with an "Assign Card" button. Below this, there are three tabs: "Card Loads", "Departments", and "Groups". The "Card Loads" tab is active, showing a large grey circular arrow icon and the text "No Transactions" with a sub-note: "You have not yet made any payments to this member".

Layout continued

- Example with Guardian / Parent added

The screenshot displays a user interface for managing payee and guardian information. It is divided into two main sections: 'Payee details' and 'Guardian / Parent Details'.

Payee details: This section is for Will Smith. It includes a red arrow pointing to the name 'Will Smith'. Below the name, there is a 'Last Edited' timestamp (04/23/2024) and an 'Edit Member' button. The details are organized into three columns: Date of birth (January 1, 2016), Gender (Male), and Address (123 Main Irving, TX 75005). A 'Payee' member role is listed, accompanied by a yellow warning box that states 'SSN Not Provided' and 'Non-waiver groups will have taxes withheld'. A pink informational box below this section explains that adding a guardian is mandatory for payees under 13 years old and that proper documentation must be obtained.

Guardian / Parent Details: This section is for John Smith, identified as a 'GUARDIAN(PARENT)'. A red arrow points to the name 'John Smith'. It includes a 'Last Edited' timestamp (04/23/2024) and an 'Edit Member' button. The details are organized into three columns: Date of birth (January 1, 1991), Gender (Male), and Address (123 Main St Irving, TX 75005). Below the details, there is a card information section showing 'Ending in 1156', an expiration date of 05/25, and a balance of \$25.50. There are three buttons: 'Replace Card', 'Reset PIN', and 'Change PIN'. At the bottom, there are navigation tabs for 'Card Loads', 'Departments', 'Groups', and 'Payee Spend'.

New payee member creation for payees under 13 years of age

- Payee member creation works the same as before the Guardian / Parent field has been added except for the Guardian / Parent field on the bottom.
 - If the payee's date of birth is under 13 years of age, the Guardian / Parent field must be filled out for payee member creation to be able to be completed.
 - Screen example on the next slide for when the DOB is under 13 years of age:

Add a Member

Member Information

First Name

Middle Initial (Optional)

Last Name

Suffix (Optional)

Email (Optional)

Roles

Departments

Groups

Date of Birth (mm/dd/yyyy)

Social Security Number (Optional)

▲ Payee Under 13 Must Add Guardian/Parent!

▲ SSN Field is unlocked. If an SSN is not provided, taxes may be withheld.

Gender

Female Male Non-Binary

Notification that the payee date of birth is under 13 years old

Address Line 1

Address Line 2 (Optional)

City

State

Zip Code

Phone Number (Optional)

Must be selected and first name, last name, gender, Date of Birth, and address must be filled out to complete profile creation.

Add Guardian/Parent

First Name

Middle Initial (Optional)

Last Name

Suffix (Optional)

Email (Optional)

Date of Birth (mm/dd/yyyy)

Gender

Female Male Non-Binary

Save button is not selectable and grayed out until the Guardian / Parent is filled out, then it will turn blue and be selectable.

Address Line 1

Address Line 2 (Optional)

City

State

Zip Code

Payee member creation screen example for payee under 13 years of age once Guardian / Parent is filled out

The screenshot displays a web form for creating a payee member for a minor. The form is divided into two sections for adding a guardian or parent. The first section is partially filled out with the following information:

- First Name:** Elizabeth
- Last Name:** Newguyre
- Email:** (empty)
- Date of Birth:** 03/03/2019
- Gender:** Female (selected)
- Address Line 1:** 222 Polk Dr
- City:** Newtown
- State:** MD
- Zip Code:** 08888

The second section is currently empty. A red box highlights the "Add Guardian/Parent" link, and a red arrow points to the "Save" button at the bottom right of the form. A text box explains that the "Save" button becomes active only after all required fields for the guardian are completed.

Annotations:

- The radial button needs to be selected and all required fields of first name, last name, date of birth, gender, and address needs completed before the profile can be saved for payee.
- Once all the Guardian / Payee required fields are filled out then the Save button will be blue and selectable.

Payee member creation for payees over 13 years of age with a Guardian / Parent added.

- The process of adding a Guardian / Parent works the same as payees under 13 years of age.
- The difference with payees over 13 years of age is optional and the profile can be saved without a Guardian / Parent added, and the Guardian / Parent can be added after the payee member profile is created.

Editing an existing payee profile to add a Guardian / Parent to the profile.

- The process to add a Guardian / Parent to an existing payee profile will follow the same format as adding to a new payee member. Refer to the new payee member creation in slides 8-10 for detailed instructions on how to complete this process.

Reset Guardian button

- To be used when the Guardian / Parent information needs changed or edited.
- A pop-up message will appear to confirm the reset when Reset Guardian is selected.

The screenshot shows a web form titled "Add Guardian/Parent" with the following fields and controls:

- First Name:** Taylor
- Last Name:** Tripp
- Email (Optional):** Type the email you use for correspondence here
- Date of Birth (mm/dd/yyyy):** 11/30/1990
- Gender:** Female Male Non-Binary
- Address Line 1:** 1234 Main St
- Address Line 2 (Optional):** University Center Of Pitt
- City:** Pittsburgh
- State:** PA
- Zip Code:** 15214
- Buttons:** "Reset Guardian" and "Delete Guardian" (highlighted with a red box and arrow)
- Bottom Right:** "Cancel" and "Save" buttons

A red box highlights the "Reset Guardian" button, with a red arrow pointing to it from a text box that reads: "Reset Guardian – removes the previous guardian information allowing new guardian information to be added."

Delete Guardian button

- To be used when the Guardian / Parent needs to be removed completely. A pop-up message will appear to confirm the deletion, once confirmed the Guardian / Parent will be removed from the profile and the card will be registered in the payee's name.
- This button does not work when the payee is under 13 years of age and a pop-up message will appear indicating that Guardian field cannot be deleted.

The screenshot shows a web form titled "Add Guardian/Parent" with the following fields and controls:

- First Name:** Taylor
- Middle Initial (Optional):** (Empty)
- Last Name:** Tripp
- Suffix (Optional):** (Empty)
- Email (Optional):** (Placeholder: "Type the email you use for correspondence here")
- Date of Birth (mm/dd/yyyy):** 11/30/1990
- Gender:** Female Male Non-Binary
- Address Line 1:** 1234 Main St
- Address Line 2 (Optional):** University Center Of Pitt
- City:** Pittsburgh
- State:** PA
- Zip Code:** 15214

At the bottom left of the form are two buttons: "Reset Guardian" and "Delete Guardian". A red box highlights the "Delete Guardian" button, with a red arrow pointing to it from a callout text box that reads: "Delete Guardian – removes the Guardian / Parent from the profile." At the bottom right of the form are "Cancel" and "Save" buttons.

Questions / Support

Email to
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UPMC@upmc.edu](mailto:vincentsupport-UPMC@upmc.edu) for
UPMC Vincent.

