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Frequently Asked Questions

About Accessing EnrollSafe

How can I resolve my Tax Identification Number (TIN) not being located by the EnrollSafe portal?

Please reach out to the specific participating payer and request they submit your TIN information to sync with our systems. Once this is completed, your TIN will be available to register.

What should I do if it says my TIN is already registered?

For security purposes, our agents are not able to provide any information to callers who are unable to identify the current associated contact. You will want to reach out to your internal peers to determine who originally initiated the request and/or if there are any third-party billers who may be associated to the account.

Is a National Provider Identifier (NPI) required to register for a username and password with EnrollSafe?

If the provider has an NPI they should populate the applicable box in the registration process. If the provider does not have an NPI, it is not required to register.

What is the difference between Registration and Enrollment?

- **Registration** is the process required to be completed to be able to create the credentials to access the EnrollSafe portal.
- **Enrollment** is the process required to be completed to submit banking information for the EFT payments.

How would a provider know if the Registration was successful?

Provider contacts should anticipate an e-mail being received from help@payeehub.org within 1-7 business days. They should ensure adding this domain to their whitelisted group, reviewing junk/spam folders, and speaking with any ISP, VPN, or additional teams if their office would have something that prevents delivery.

- If **approved**, the e-mail will contain a link with instructions of the next step for creating login credentials for the EnrollSafe portal.
- If **denied**, the e-mail will contain referenced into what needs to be corrected prior to submitting an additional registration request.

What are the reasons why a Registration would be denied?

- If the associated document is not the latest revision found at https://www.irs.gov/FormW9
- Line 1 is blank
- If there are any signs of correction on the form
- If the TIN is not listed appropriately on the form
- If it was not completed, signed, and dated
- The Provider Contact First and/or Last Name is initials, a title, or the practice name (not including individuals).

Can a contact add another Tax Identification Number (TIN) to a Registration or Active account?

If the TIN being referred to is a Disregarded Entity, it should only be added on Line 2 of the W-9 for reference.

The EnrollSafe portal will only allow one unique contact per TIN.

About Enrollment

What if I'm already getting paid via EFT?

If payments are already being completed to a correct account, no action is required at this time unless otherwise notified for future changes by a Payer.

If payment information needs to be updated, a Registration request must be completed prior to submitting an Enrollment with the new banking information.

NOTE: EnrollSafe enrollments will replace ALL historical EFT enrollments the participating plans may have for the entire TIN. If submitting a TIN+NPI level enrollment, ensure all desired TIN+NPI combinations are included; any TIN+NPI not included will be paid by an alternate method of payment. The alternate method of payment can be in the form of Virtual Credit Card, Zelis ACH+, or Check which may result in third party service fees.

Are any fees associated with using this website?

No, there are no fees associated for EFTs processed via this portal.

Where can I find a list of Payers that are participating in EnrollSafe?

The list is available once Registration has been completed and the user is logged in to the portal.

Can a contact add another Tax Identification Number (TIN) to the account?

No, there can only be one unique TIN per account.

Can a contact add more than one bank account per TIN?

Only if enrolling at the NPI-level. A bank account may have multiple NPIs associated, but each NPI may only have one active bank.

NOTE: An account may not have both a TIN and NPI level enrollment active at the same time.

Can more than one contact be listed per TIN?

No, there can only be one contact listed per account.

What are the reasons a Bank Document would not be accepted?

- The banking information listed is either incomplete or does not match what was submitted.
- The submitted document was a starter/sample check.
- The bank letter does not complete all the criteria required.
- It is not considered an acceptable document.

How would a provider know if the Enrollment request was successful?

If the validation is successful, an e-mail advising of Activation will be sent to the contact on record.

Providers can check the status of their bank account(s) request after logging in to the EnrollSafe Portal.

How do I update the banking information?

You will need to CANCEL the current Enrollment request. Once the Status appropriately reflects CANCELLED, you can use the ADD BANK button to complete a new submission. Please refer to How to Manage Enrollment(s) – Cancellation for a walkthrough on completing the original action.

How can a provider get assistance after their enrollment is complete (e.g. Network, Payment, or claim-related inquiries)?

The provider should contact their local Provider Experience Representative from their specific Payer for further assistance. Click on the specific Payer link after logging in to EnrollSafe to be redirected to their website and utilize the appropriate Contact method listed.

About Technical Support Issues

General Troubleshooting Steps

- Access the website using a personal computer. Tablets and mobile devices are not supported.
- Please ensure you are using the most recent version of Google Chrome. This is the preferred browser.
- Clear your cache and cookies, making sure to choose the Time range of “All time”.
- Restart the browser.

My Password Reset link isn't working

- Verify that your Internet Service Provider (ISP), Virtual Private Network (VPN), IT group, and/or browser security settings are not in place that would prevent utilizing the link.
- Follow the General Troubleshooting Steps outlined.
- Use the URL bar of your browser and manually type in the portal you are attempting to access.
- Click the Forgot Password from the main page and attempt to access the new link via e-mail.

My document isn't being uploaded onto the website/General error when attempting to submit an Enrollment on Step 4

- Access the website using a personal computer. Tablets and mobile devices are not supported.
- Please ensure you are using the most recent version of Google Chrome. This is the preferred browser.
- Clear your cache and cookies, making sure to choose the Time range of "All time".
- Restart the browser.
- If attempting to attach a document, confirm the file's type, size, and location.
    - It needs to be a standard PDF.
    - If it is too small or too large, the website will produce a general error when attempting to submit – ideally about 3.5 MB and under 4 MB.
    - The file should be saved on your PC somewhere - if trying to use a cloud-based system, there may be issues with it uploading appropriately.

I cannot click the I Agree button for Terms and Conditions

If you step away at any point while completing an Enrollment request, the portal may time out and you will need to log in again. If still having issues after logging in, please refer to the General Troubleshooting Steps outlined.

I don't know how to convert my document into a PDF

- Open the document you want to save as a PDF.
- Click on the File tab.
    - In Word, click Save As | PDF from the drop-down menu.
    - In Google Docs, click File | Download | PDF.
    - In Pages, it's File | Export to | PDF.

- In the file name box, .pdf will automatically appear at the end of your file name. You will select this new PDF when it is time to upload to our portal.

I'm not receiving e-mails related to my account, such as assistance with username or password.

Please make sure to have @PayeeHub.Org added into your Whitelisted domains.

E-mails related to accessing your account will come from help@payeehub.org.
E-mails related to changes in your account will come from no-reply@payeehub.org.

About Claims and Payments

This section is intended to try to provide directional information that may be available. Our EnrollSafe portal has no transactional information. Providers will need to reach out directly to their Clearing Houses or Payers for answers regarding these issues.

Why are my payments not coming through the EFT I requested?

Please review the following pieces of information to confirm if we're able to provide insight on why payment(s) were not received to your account of record:

- Is your EFT listed as "ACTIVE" in the portal?
  - If not, then the request is not completed and acknowledged by the Payer(s).

- Were the claims submitted before or after the contact received the Active confirmation e-mail?
  - If after, all prior claims are processed and paid via the previous payment method.

- Is it NPI specific?
  - If so, is the NPI associated with an Active Enrollment?

- Is the specific Payer listed among the participating plans?
  - If not, they are not going to be able to honor the request.

My EOBs/ERAs are going to the wrong address, how can I update that?

The address associated with the EnrollSafe portal is not forwarded to the Payer. You would need to reach out to them directly and request the steps required to have your information updated in their systems.

NOTE: Click on the specific Payer link after logging in to EnrollSafe to be redirected to their website and utilize the appropriate Contact method listed.

About Contacting PayeeHub Customer Support

The support team's normal hours of operation are Monday to Friday from 9:00 AM to 8:00 PM EST via (877) 882-0384.

How to Request Registration for Enrollment

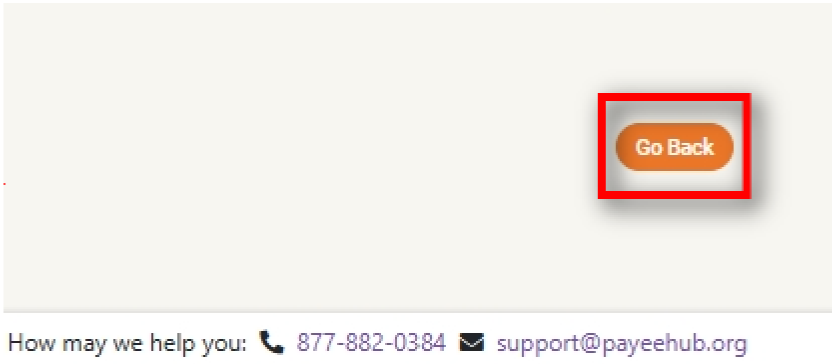
INTRODUCTION

The contact for the provider submitting the registration is required to be authorized to make payment related decisions for the practice.

NOTE: Registration is used for requesting access to the EnrollSafe portal and does not constitute an EFT Enrollment request for setting up direct deposit.

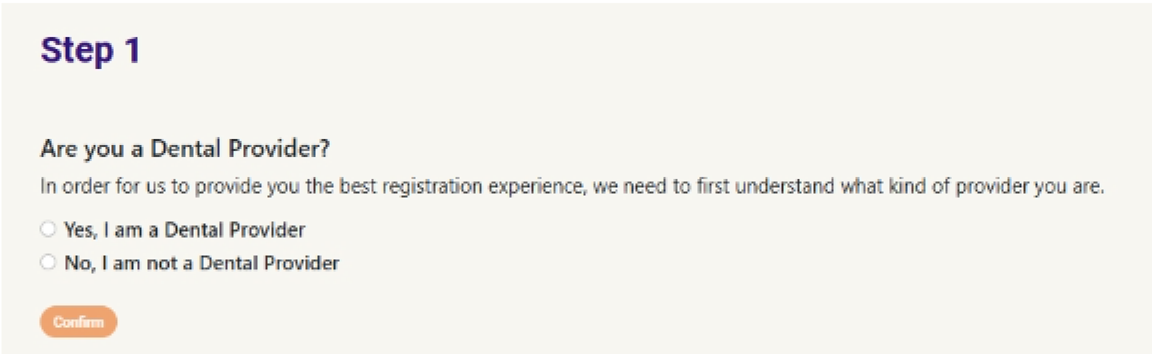
Once the contact has selected the **Register** link at the top of the screen, they will be walked through a series of steps to provide the information required.

Please make sure to review for accuracy during the process and use the **Go Back** button to move to a previous screen for updating. Once submitted, the information is not able to be changed.



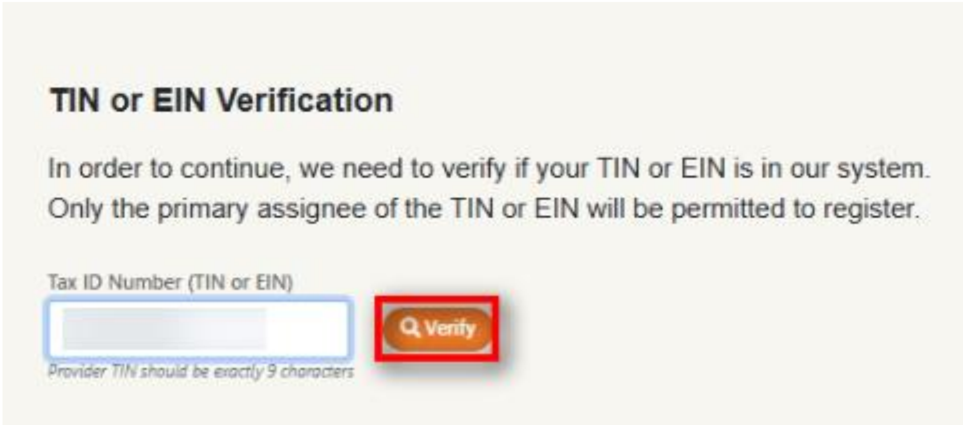
Step 1a: Registering a Dental Provider?

The provider will be asked to specify if the Tax ID Number (TIN) they are registering is associated with a Dental Provider. The Provider will select **Yes, I am a Dental Provider** or **No, I am not a Dental Provider** and then click **Confirm** to continue.



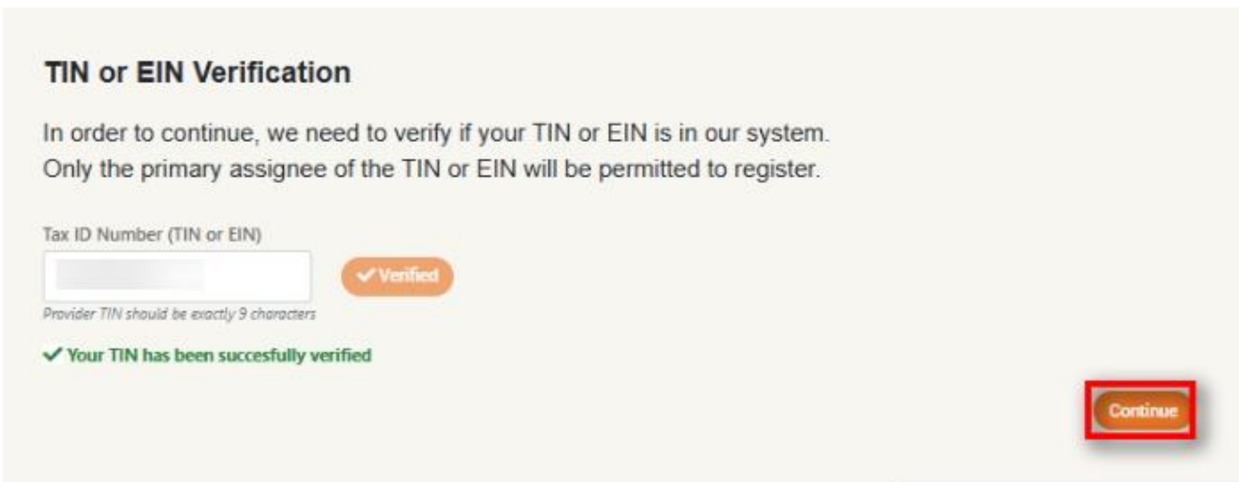
Step 1b: Provider Tax ID Number (TIN) or Employer ID Number (EIN)

The provider will enter their TIN or EIN in the field provided and select **Verify** to confirm eligibility.

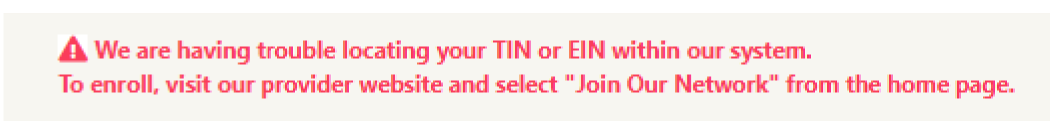


There are three possible outcomes:

1. If a response of **Your TIN has been successfully verified** is received, select **Continue**.



2. If the TIN is unable to be found, please speak out with the specific participating payer and request they submit your TIN information to sync with our systems. Once this is completed, your TIN will be available to register.



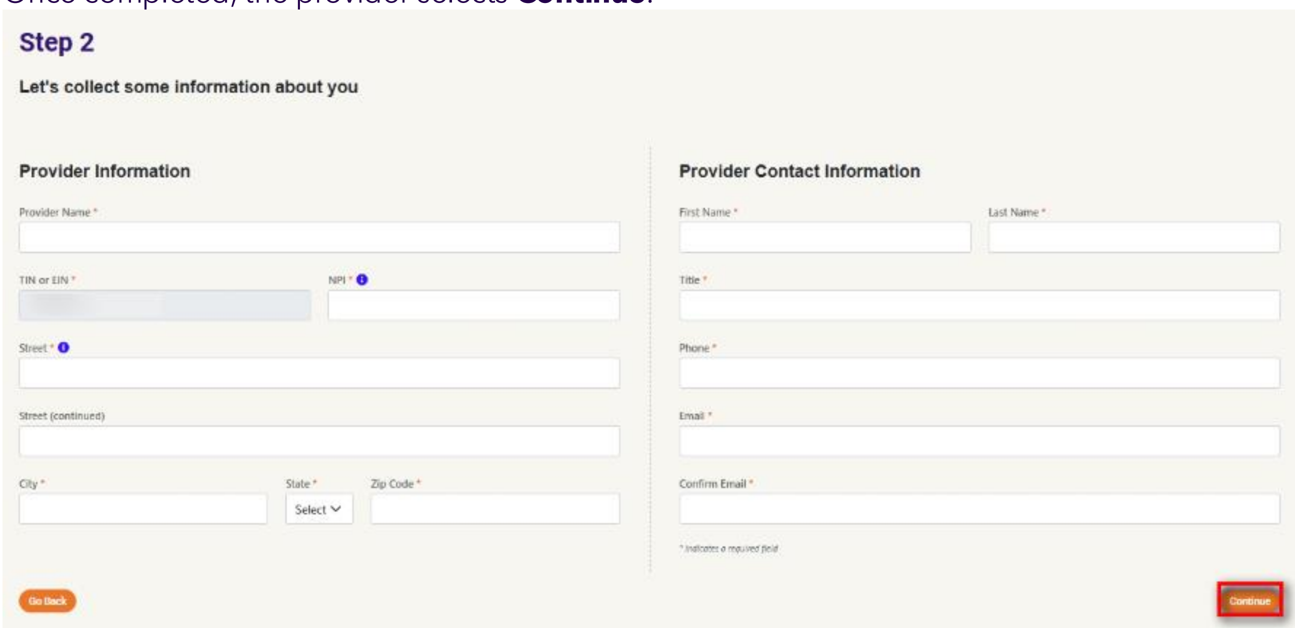
3. If the response is **This TIN or EIN has already completed registration**, the system will not proceed further as there is already a request associated. You may review additional information in our FAQ portion of the document related to this notification.

Step 2: Provide Practice and Contact Information

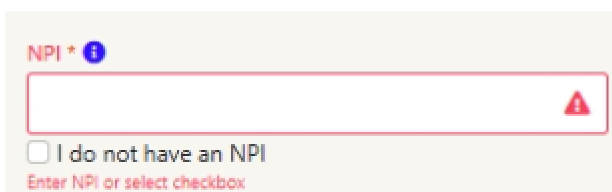
The provider populates the **Provider Information** and **Provider Contact Information** fields. Required fields are indicated with an *.

NOTE: A full contact name is required, this should not have initials, the practice name (unless of an individual), or a title for the First and Last Name.

Once completed, the provider selects **Continue**.



An NPI should be supplied if any are available at group or individual level. If a provider does not have an NPI, they can click "Submit" and a box will pop up confirming no NPI should be submitted.

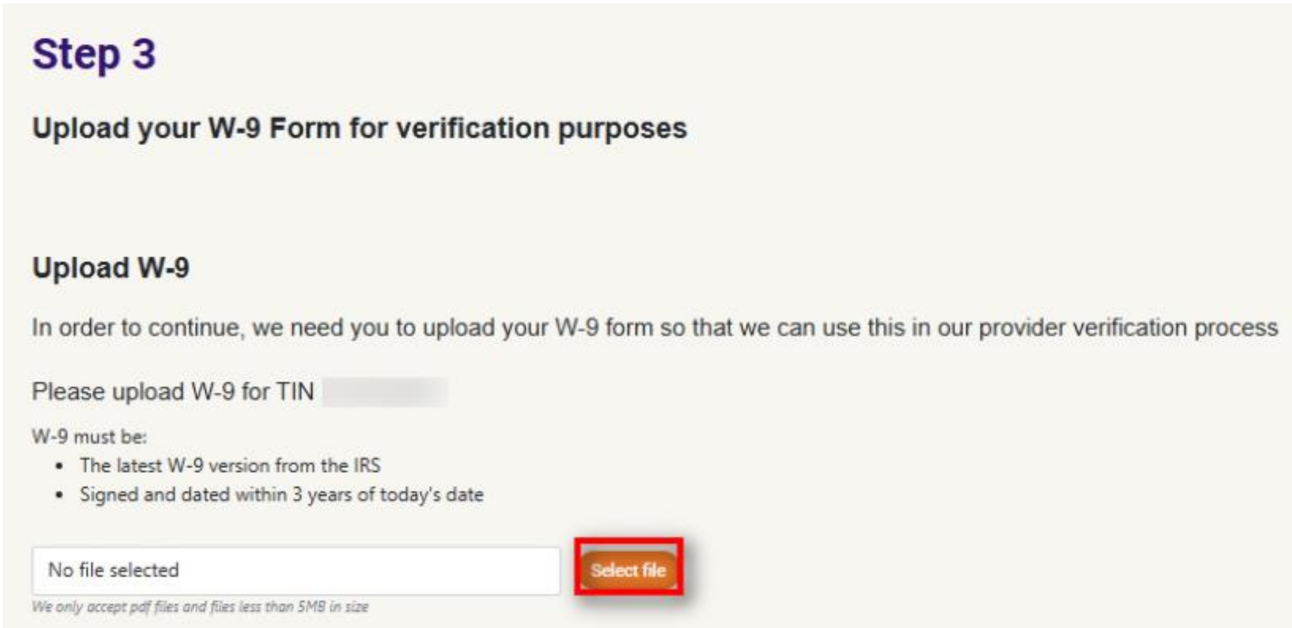


Step 3: Upload Copy of W-9 Form

For security purposes, the provider is required to submit a W9 in PDF form associated with the TIN or EIN being enrolled. [Please refer to the FAQ regarding Registration for requirements].

The provider will click **Select File** and a file explorer window will display in their browser. The Provider will locate the appropriate file within their desktop and attach it, then select **Continue**.

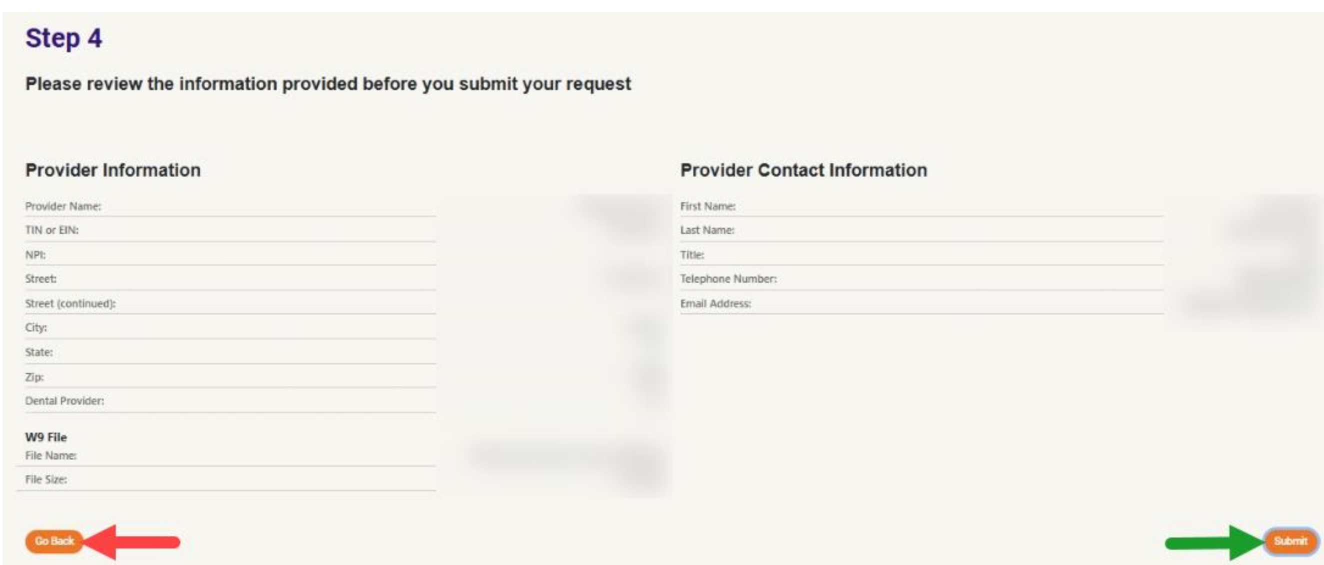
[For further assistance regarding issues of uploading or ensuring the correct file type is available, please review our FAQ regarding Technical Support.](#)



Step 4: Review Information Provided

The provider contact will be asked to review the information they have entered. If correct, the provider selects **Submit**. If any of the information is incorrect, the provider selects **Go Back**.

Please note once this is submitted, there is no way to change the information associated during the registration process.

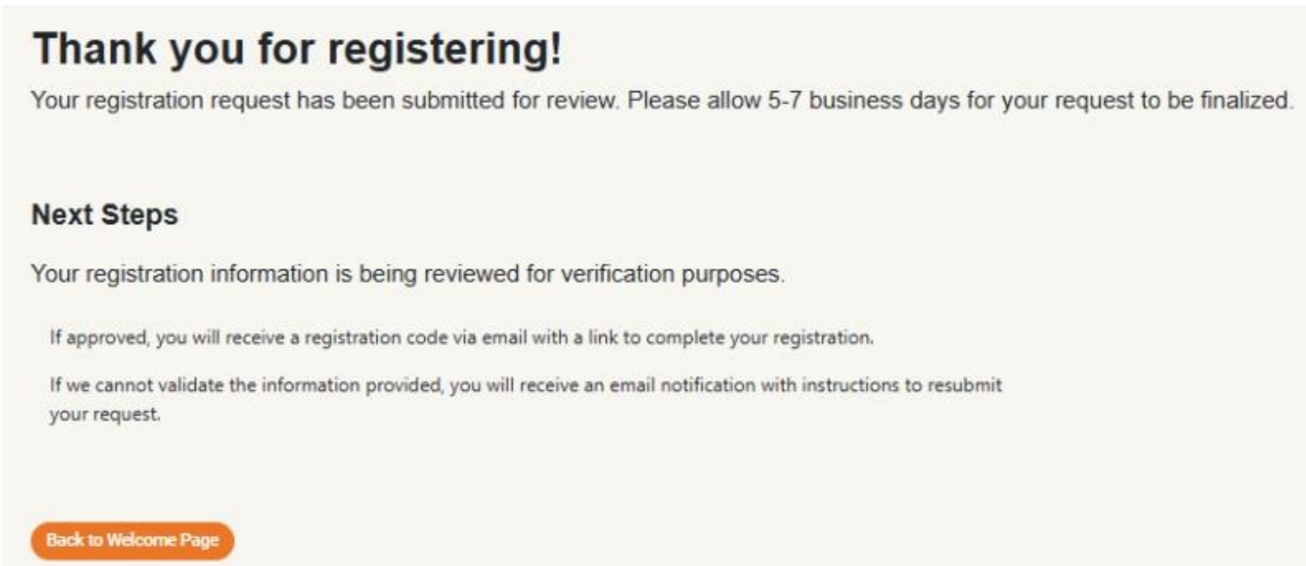


Registration: Next Steps

Once the provider has reviewed the information entered and selected Submit, they have successfully requested an account be created for their practice. The provider will have the option to return to the Portal's Welcome Page.

NOTE: The provider will be sent an email with instructions on how to create their login credentials within 5 to 7 business days from help@payeehub.org.

These actions will only allow for logging in to the portal, no EFT request has been completed at this time.



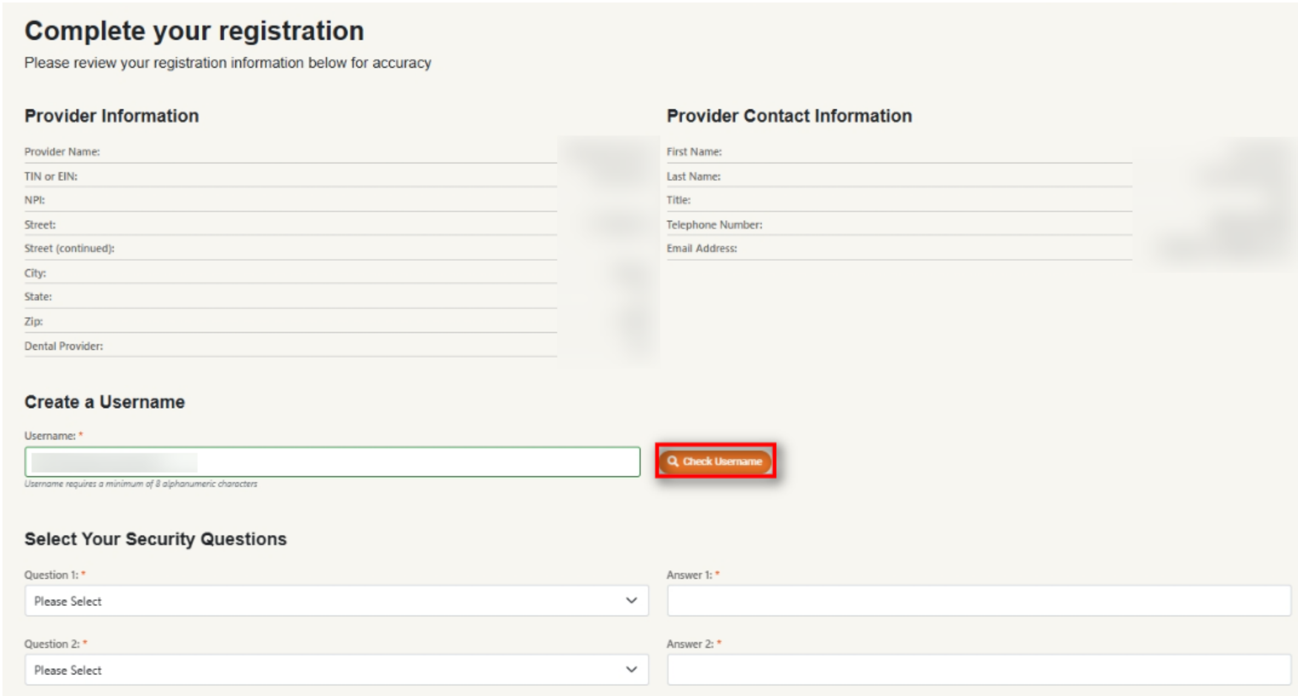
Creating Log-in Credentials

Choosing Username and Security Questions

A link will be e-mailed directly to the contact submitted by the provider to confirm their user account request and complete registration. The contact will be asked to choose a unique username. The provider will enter the desired username and select **Check username** to ensure it is not already in use.

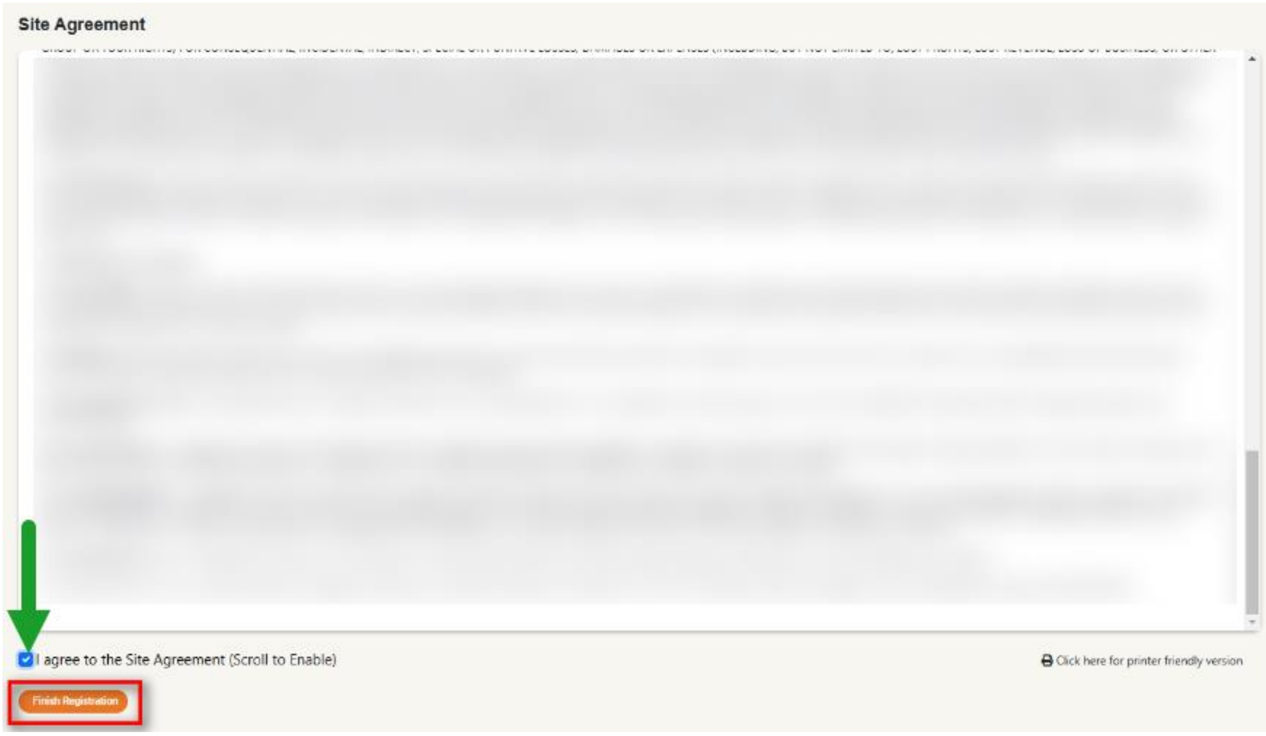
Once completed, the provider will select two security questions and fill out each answer accordingly.

NOTE: There can only be one contact and one username per portal per TIN.



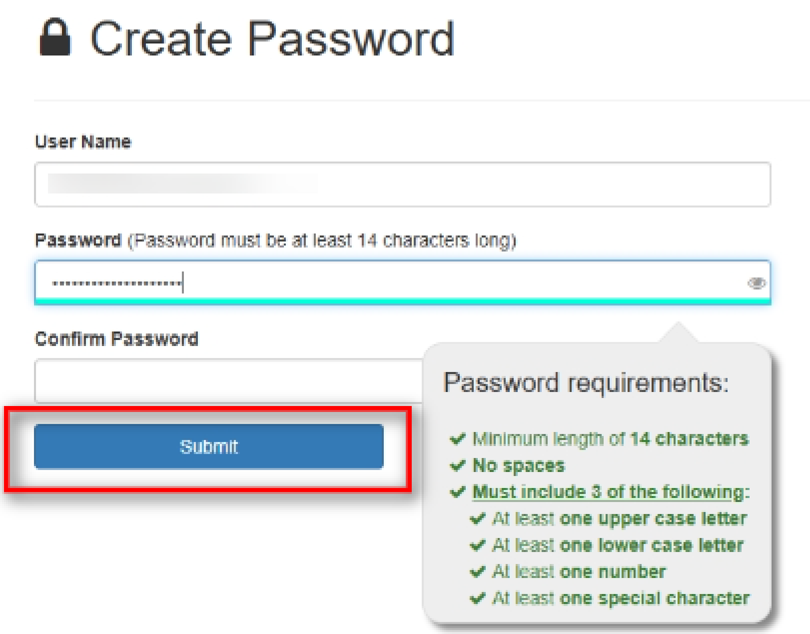
The provider will review all information displayed on the screen for accuracy. The provider will review the agreement, click the **I agree to the Site Agreement** checkbox, then click **Finish Registration**.

NOTE: If the information associated is not correct, please do not click Finish Registration. Reach out to Customer Support and advise you are requesting to have your registration Cancelled due to incorrect information.



Creating a Password

After submitting the information and completing the Site Agreement, the contact will receive an additional e-mail titled **"Please Create Your Password"** that will contain a link allowing them to create a password. The provider will fill out the fields provided and select **Create Password**.



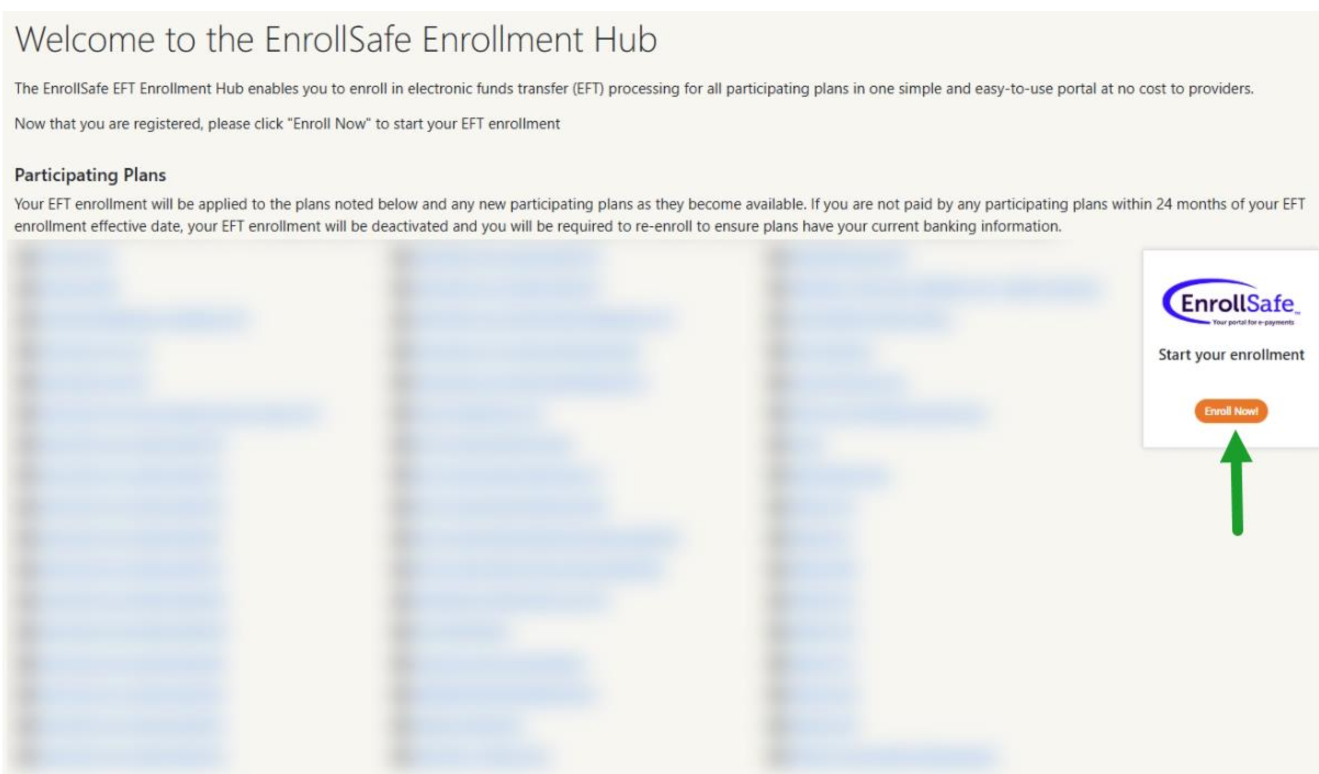
Congratulations! The contact has now completed their registration and is able to log in and submit the Enrollment request(s). There is a link immediately available to login from the Create Password Confirmation screen or they can navigate to the main portal page and click **Log in**.

How to Submit 1st Enrollment

After logging in successfully, click the **Enroll Now!** Button.

Please make sure to begin process when you are going to be able to complete the request in a timely manner so that there is no internal time-out on the portal due to lack of activity.

NOTE: EnrollSafe enrollments will replace ALL historical EFT enrollments the participating plans may have for the entire TIN. If submitting a TIN+NPI level enrollment, ensure all desired TIN+NPI combinations are included; any TIN+NPI not included will be paid by an alternate method of payment. The alternate method of payment can be in the form of Virtual Credit Card, Zelis ACH+, or Check which may result in third party service fees.



Step 1: Selecting Enrollment Type

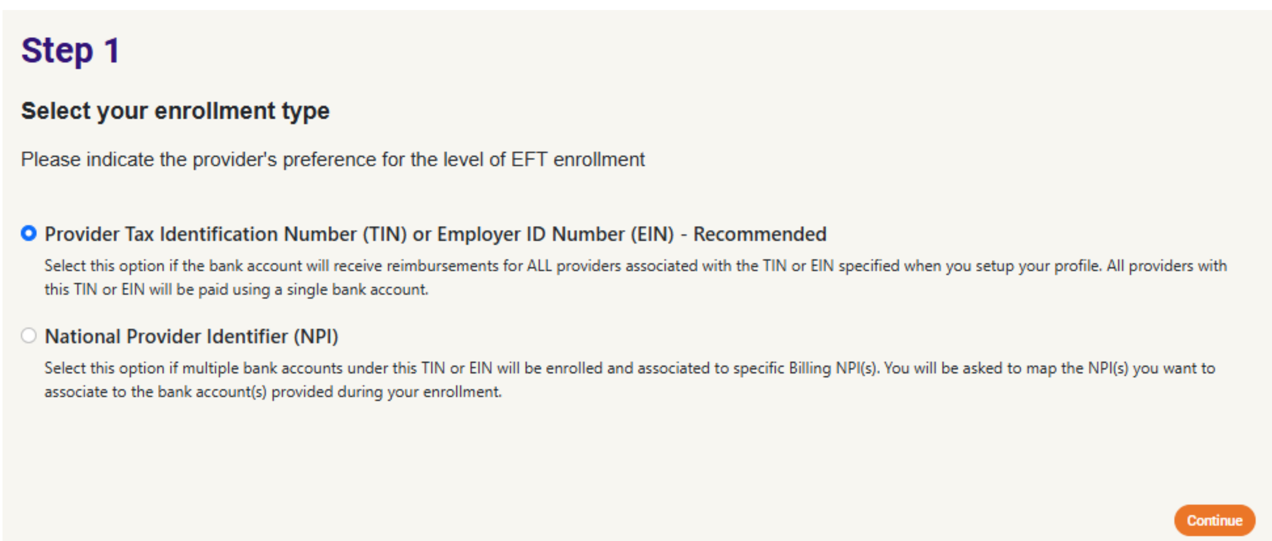
Validate the TIN or EIN number currently logged in on the portal

The contact will be required to re-validate the TIN or EIN that was submitted during registration, to ensure the enrollment is linked to the correct account.

Choose Enrollment Level - TIN

The contact will choose TIN and click **Continue**.

NOTE: EnrollSafe enrollments will replace ALL historical EFT enrollments the participating plans may have for the entire TIN. If submitting a TIN+NPI level enrollment, ensure all desired TIN+NPI combinations are included; any TIN+NPI not included will be paid by an alternate method of payment. The alternate method of payment can be in the form of Virtual Credit Card, Zelis ACH+, or Check which may result in third party service fees.

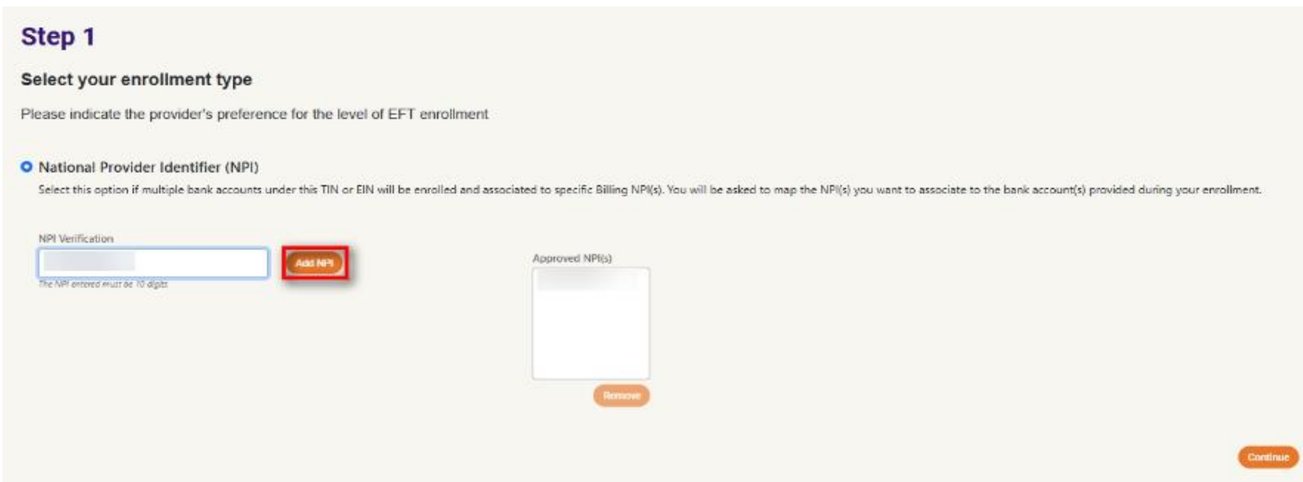


Choose Enrollment Level – NPI

The contact will choose NPI and then add all associated NPIs that will be enrolling, clicking **Add NPI** to populate the list or highlight one already listed in **Approved NPI(s)** and choosing **Remove** to delete. Once completed, click **Continue**.

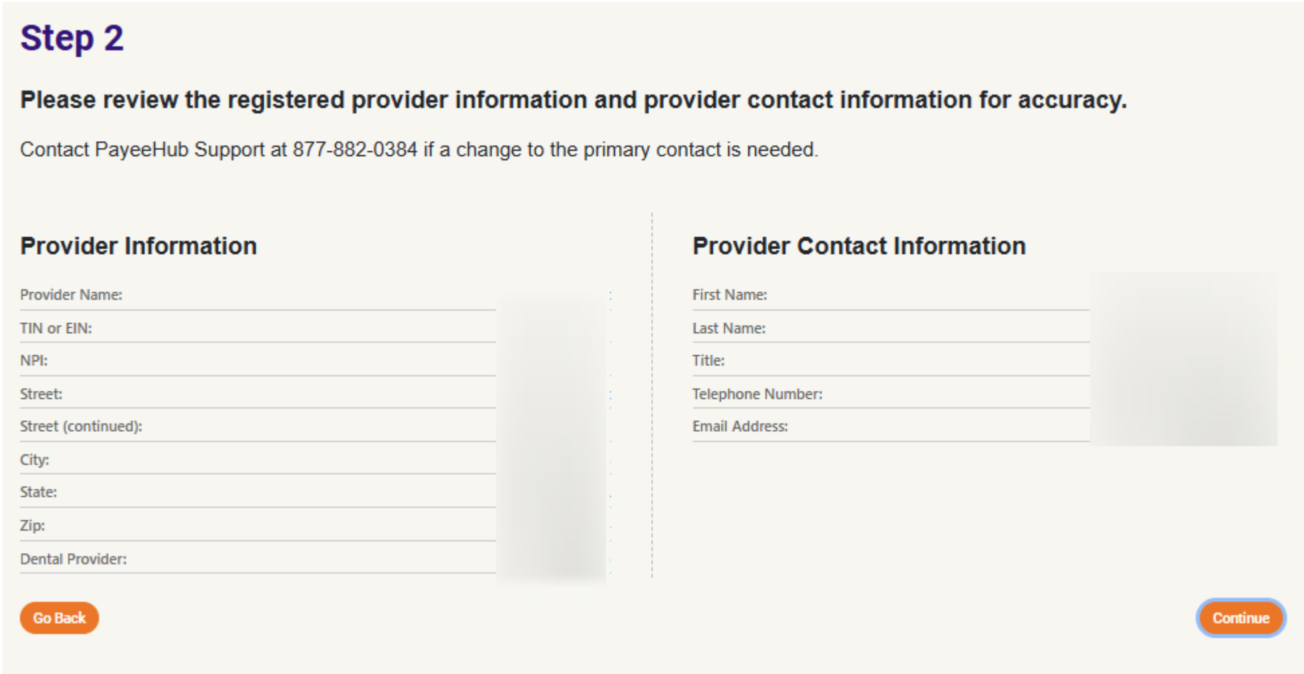
NOTE:

- If receiving an error "We are having trouble locating your NPI within our system.", please reach out to your specific payer by clicking their link from the list of participating payers after logging in to EnrollSafe to be redirected to their website. Utilize the appropriate Contact method listed to request they update their records with that NPI and sync with our systems.
- EnrollSafe enrollments will replace ALL historical EFT enrollments the participating plans may have for the entire TIN. If submitting a TIN+NPI level enrollment, ensure all desired TIN+NPI combinations are included; any TIN+NPI not included will be paid by an alternate method of payment. The alternate method of payment can be in the form of Virtual Credit Card, Zelis ACH+, or Check which may result in third party service fees.



Step 2: Review Provider Information

The contact will review the current Practice and Contact information associated with the account from registration. If there are any discrepancies, please reach out to the Customer Support to have the registration cancelled. The contact will need to submit a new Registration request with corrected information.

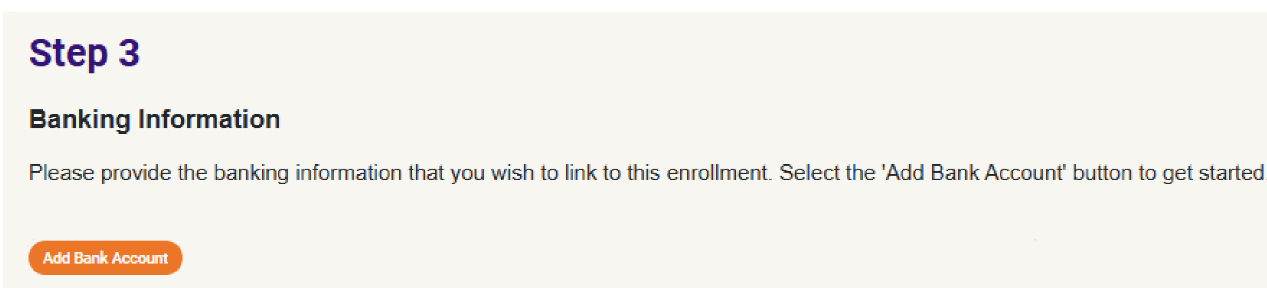


Step 3: Add Banking Information

Click **Add Bank Account**. The options will look slightly different depending on if TIN level or NPI level was previously chosen.

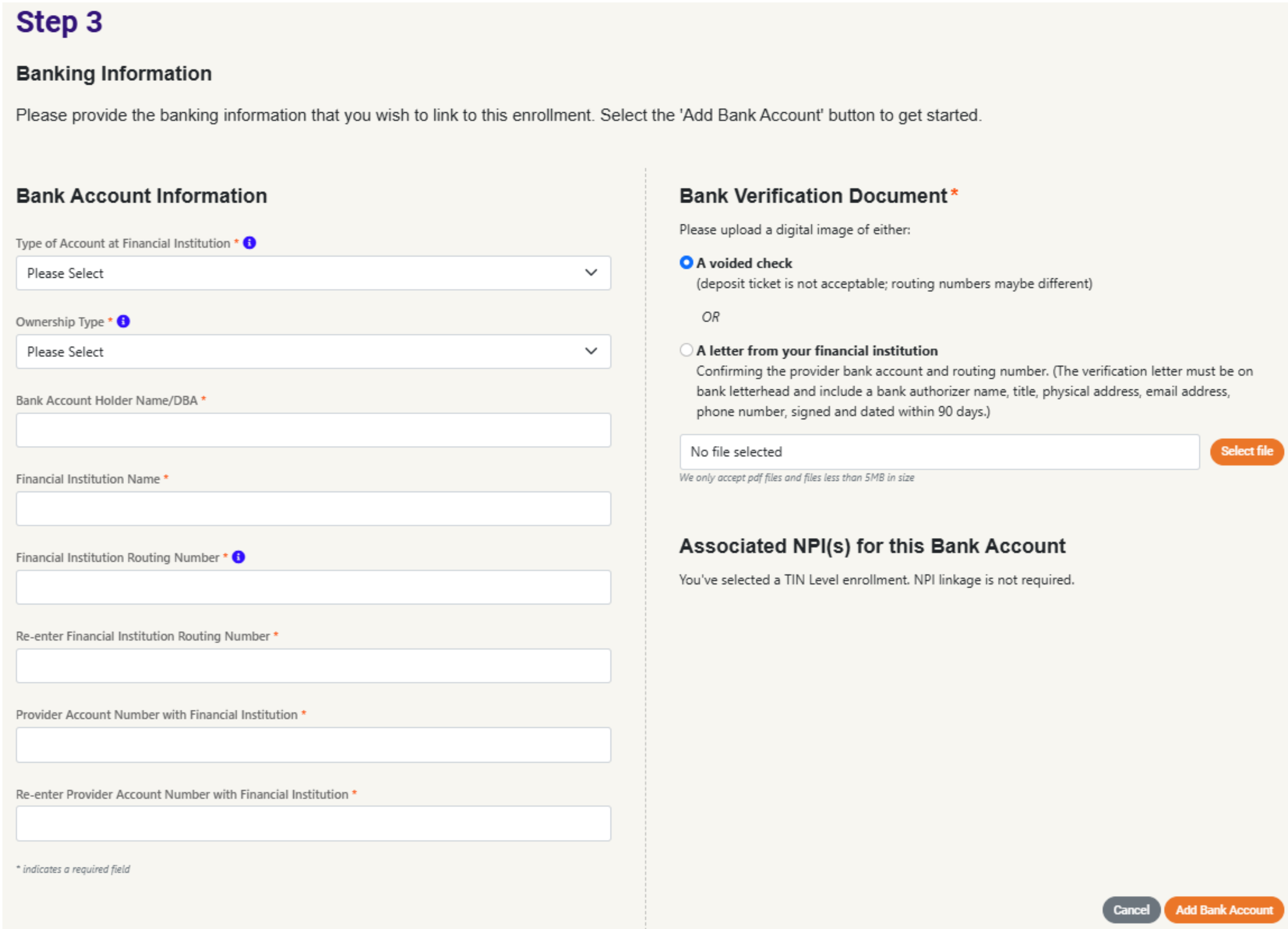
The provider will now be asked to submit the Banking Information associated with their enrollment. The provider will be required to submit a digital copy of a Bank Verification Document during this portion of the enrollment. The provider should review the requirements carefully to avoid delays.

The document(s) associated must be in a PDF format. If any issues arise while trying to upload the document, or there is a general error when attempting to submit the Enrollment request, please refer to our FAQ section.



TIN Level

Only one bank may be added at a TIN level enrollment. Complete the requested information and click **Add Bank Account**.



Step 3

Banking Information

Please provide the banking information that you wish to link to this enrollment. Select the 'Add Bank Account' button to get started.

Bank Account Information

Type of Account at Financial Institution *

Please Select

Ownership Type *

Please Select

Bank Account Holder Name/DBA *

Financial Institution Name *

Financial Institution Routing Number *

Re-enter Financial Institution Routing Number *

Provider Account Number with Financial Institution *

Re-enter Provider Account Number with Financial Institution *

** indicates a required field*

Bank Verification Document*

Please upload a digital image of either:

A voided check
(deposit ticket is not acceptable; routing numbers maybe different)

OR

A letter from your financial institution
Confirming the provider bank account and routing number. (The verification letter must be on bank letterhead and include a bank authorizer name, title, physical address, email address, phone number, signed and dated within 90 days.)

No file selected | Select file

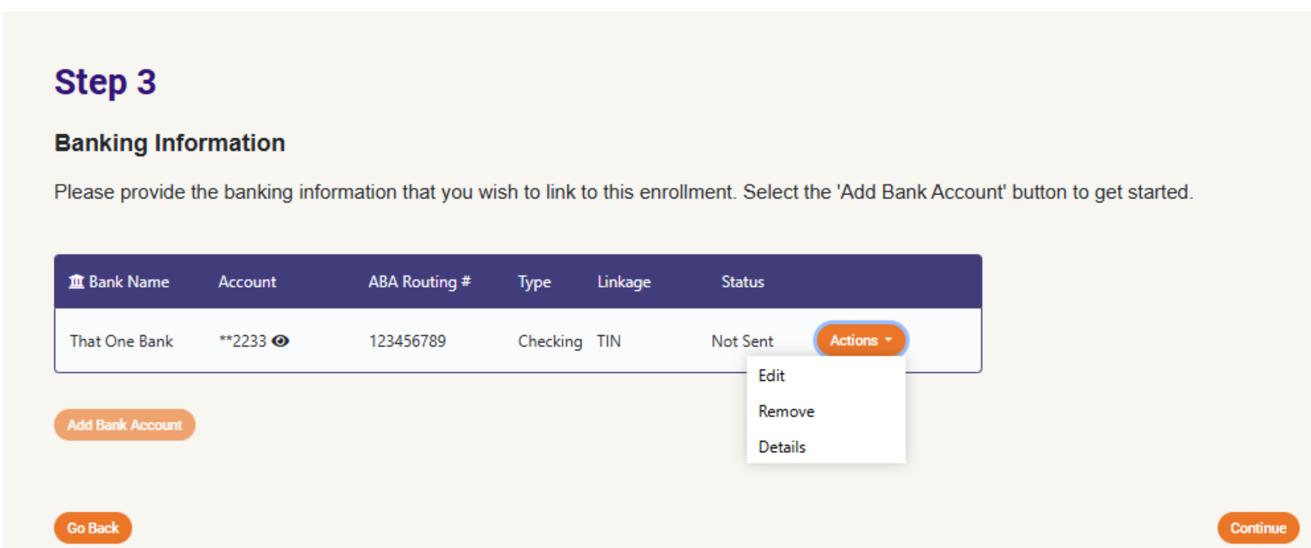
We only accept pdf files and files less than 5MB in size

Associated NPI(s) for this Bank Account

You've selected a TIN Level enrollment. NPI linkage is not required.

Cancel | Add Bank Account

There will be an additional place to review the bank account information and click **Continue**. If the information is not correct, click **Actions** and choose either **Edit** to have the information drop down to be updated or **Remove** to delete completely.



Step 3

Banking Information

Please provide the banking information that you wish to link to this enrollment. Select the 'Add Bank Account' button to get started.

Bank Name	Account	ABA Routing #	Type	Linkage	Status	
That One Bank	**2233	123456789	Checking	TIN	Not Sent	Actions

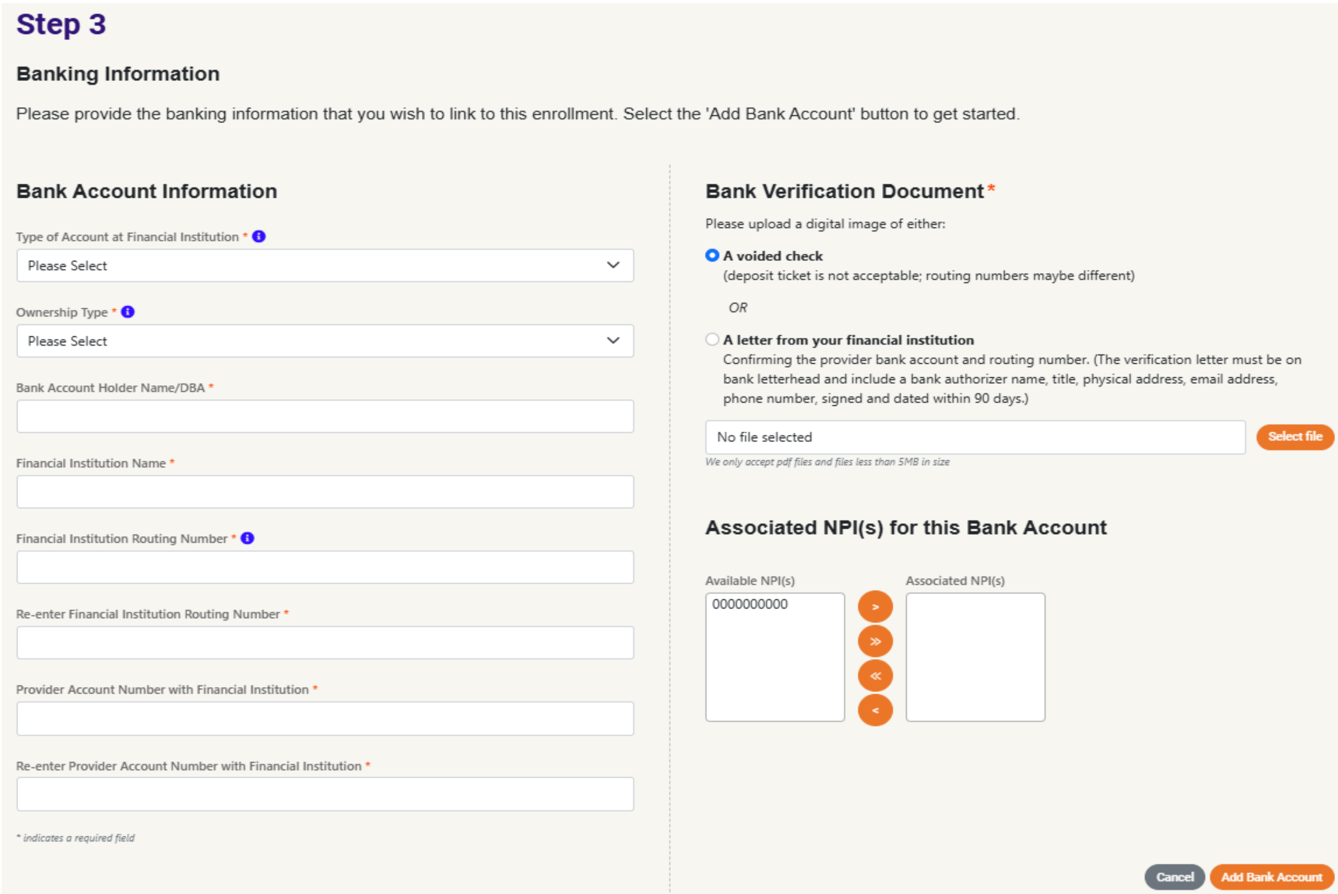
Edit
Remove
Details

Add Bank Account

Go Back | Continue

NPI Level

Multiple banks may be added, but a specific NPI may only be actively associated with one of them. In the lower right-hand corner, click on a number listed within the **Available NPI(s)** and use the orange arrow keys to move any that should be in the **Associated NPI(s)** for the current bank account being entered.



Step 3

Banking Information

Please provide the banking information that you wish to link to this enrollment. Select the 'Add Bank Account' button to get started.

Bank Account Information

Type of Account at Financial Institution *
Please Select

Ownership Type *
Please Select

Bank Account Holder Name/DBA *

Financial Institution Name *

Financial Institution Routing Number *

Re-enter Financial Institution Routing Number *

Provider Account Number with Financial Institution *

Re-enter Provider Account Number with Financial Institution *

* indicates a required field

Bank Verification Document*

Please upload a digital image of either:

A voided check
(deposit ticket is not acceptable; routing numbers maybe different)

OR

A letter from your financial institution
Confirming the provider bank account and routing number. (The verification letter must be on bank letterhead and include a bank authorizer name, title, physical address, email address, phone number, signed and dated within 90 days.)

No file selected
Select file
We only accept pdf files and files less than 5MB in size

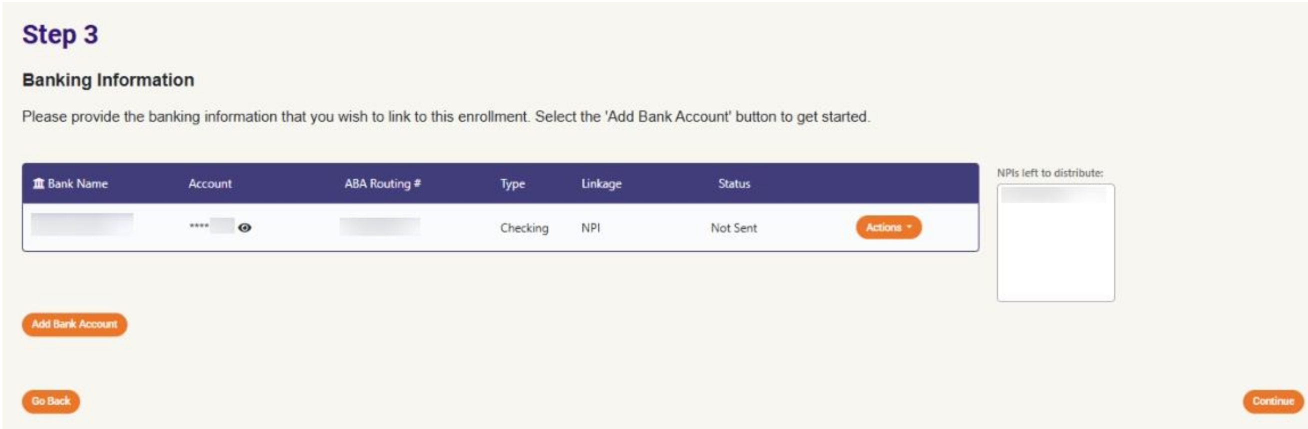
Associated NPI(s) for this Bank Account

Available NPI(s)
0000000000
Associated NPI(s)

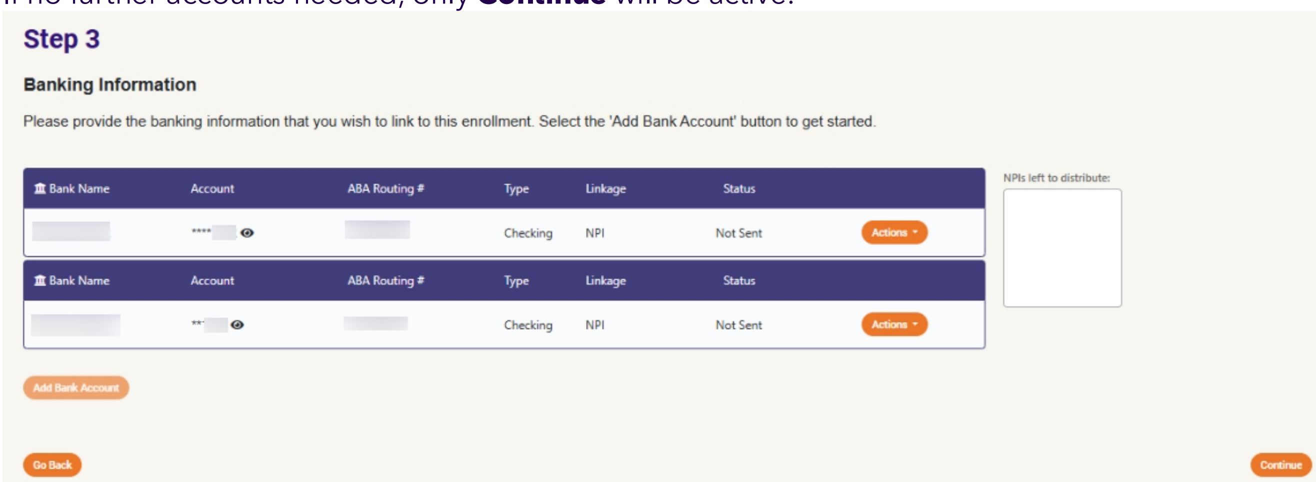
Cancel
Add Bank Account

There will be an additional place to review the bank account information and select an option to proceed.

- If the information of any account is not correct, click **Actions** and choose either **Edit** to have the information drop down to be updated or **Remove** to delete completely.
- If there are any **NPIs left to distribute**, both the **Add Bank Account** and **Continue** option will be available.



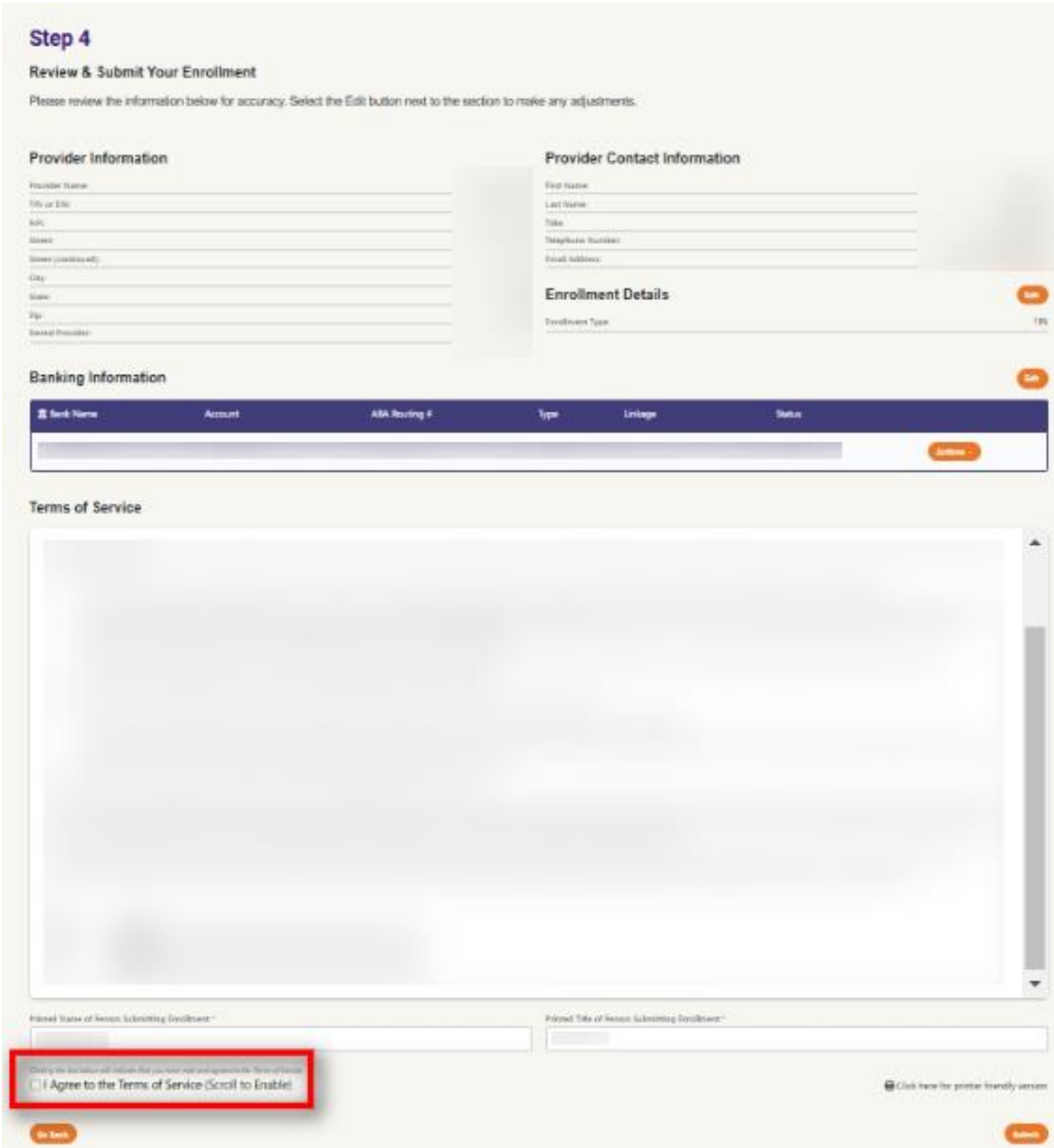
If no further accounts needed, only **Continue** will be active.



Step 4: Review & Submit Your Enrollment

The last step will provide a summary of all the information associated with the Enrollment request to for a final review for accuracy before submission. If any of the pieces are wrong, the contact should utilize the **Go Back** option to update.

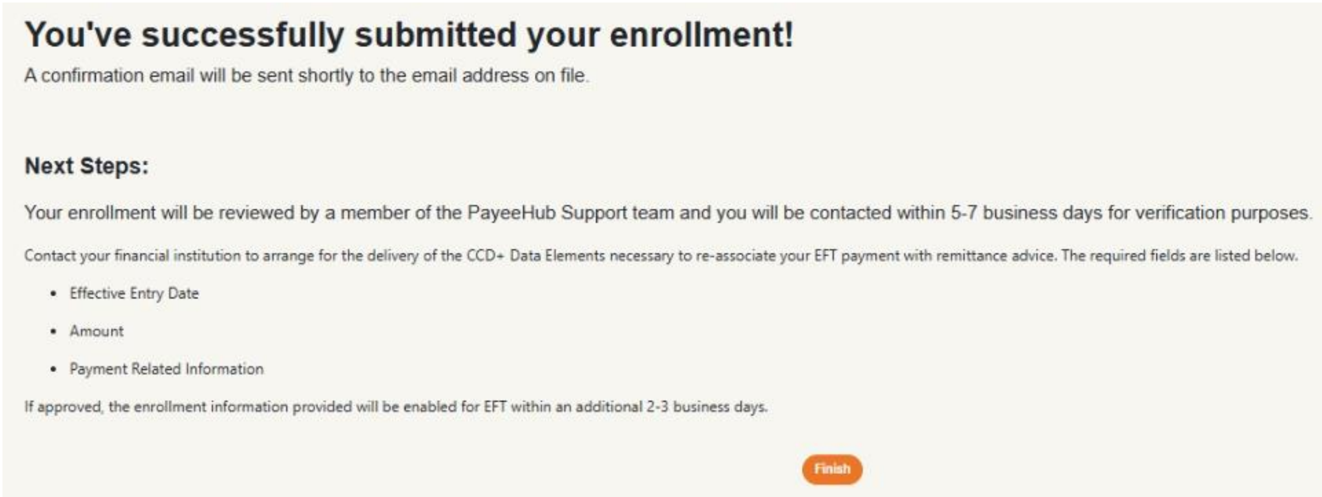
Once completed, the provider will review the agreement and enter their Name and Title for an e-signature, then click the **I Agree to the Terms of Service** checkbox and then **Submit.**



Enrollment: Next Steps

A confirmation message will display to let the provider know that the Enrollment process is complete. The provider may click **Finish** to be directed to the homepage. The contact will also receive an e-mail confirming the successful submission.

NOTE: In some instances, a phone call is required to complete the verification. Outreach will be made from 877-882-0384, PayeeHub's toll-free number. The contact will be required to provide information submitted during Registration and Enrollment, including the full routing and account number of any associated bank.



You've successfully submitted your enrollment!

A confirmation email will be sent shortly to the email address on file.

Next Steps:

Your enrollment will be reviewed by a member of the PayeeHub Support team and you will be contacted within 5-7 business days for verification purposes.

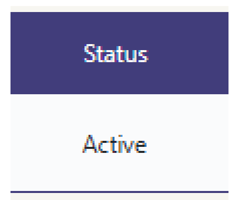
Contact your financial institution to arrange for the delivery of the CCD+ Data Elements necessary to re-associate your EFT payment with remittance advice. The required fields are listed below.

- Effective Entry Date
- Amount
- Payment Related Information

If approved, the enrollment information provided will be enabled for EFT within an additional 2-3 business days.

Finish

An additional e-mail will be received once the Enrollment has been completed, accepted and processed by the Payer(s), and is **Active** in the portal.

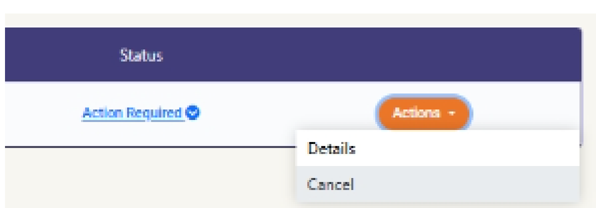


Resolving Action Required

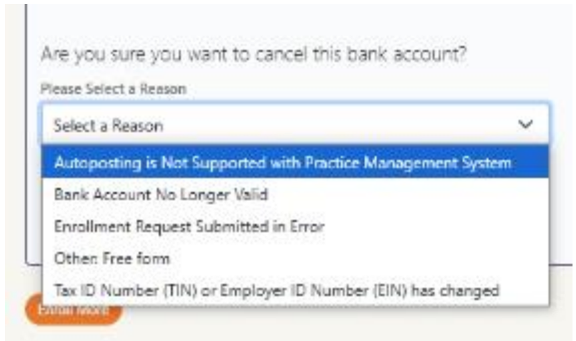
Action Required – Pending Enrollment

Cancelling Requested Enrollment

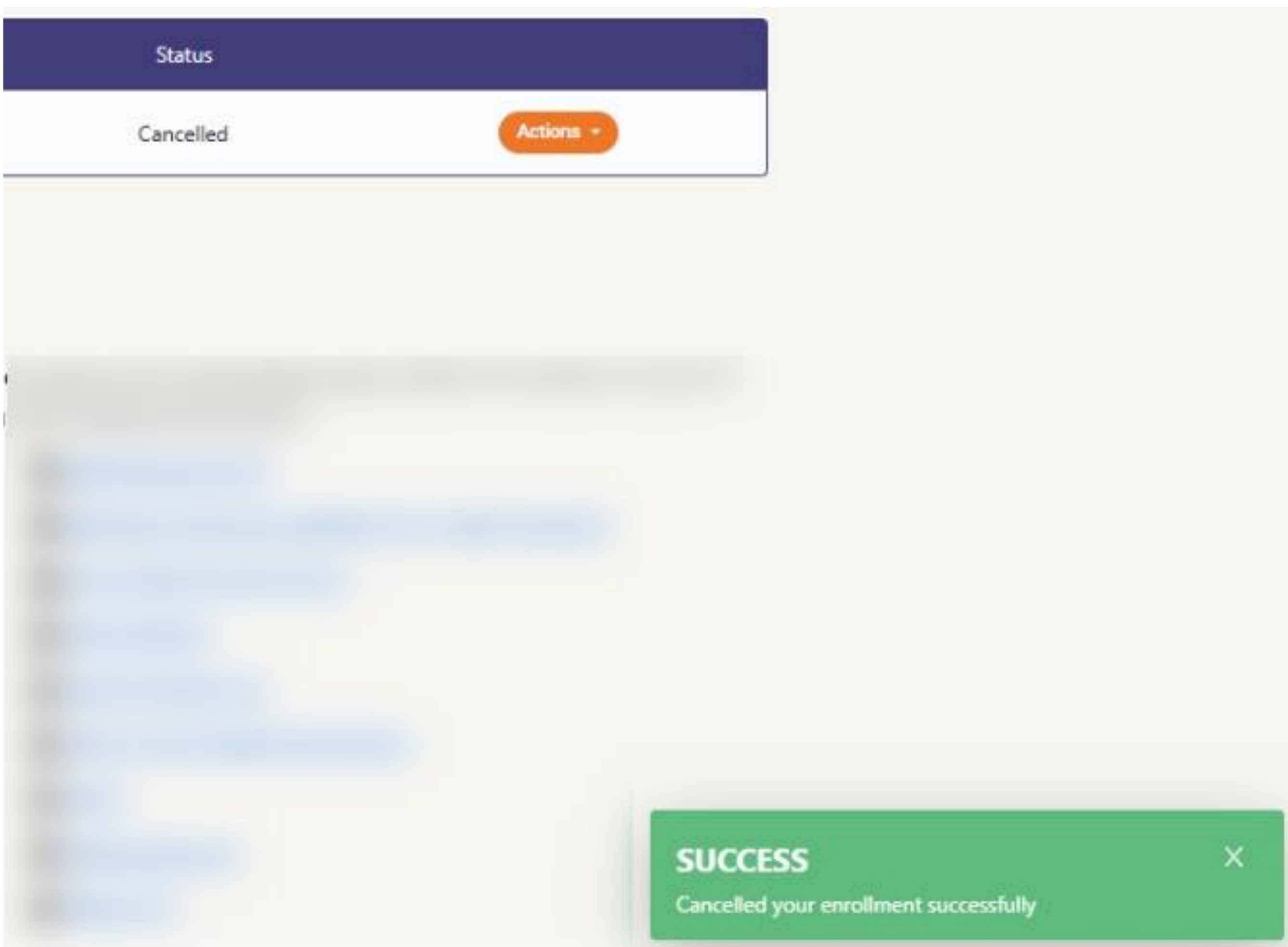
If the account associated with an Enrollment has an Action Required that results in requiring the request to be cancelled, click the **Action** drop down and select **Cancel**.



The banking information selection will expand, and a reason must be chosen and the **Yes** button clicked to complete the request.



Once complete, a green box will appear in the lower right-hand corner advising of SUCCESS and the Status of that specific Enrollment request will now show Cancelled.



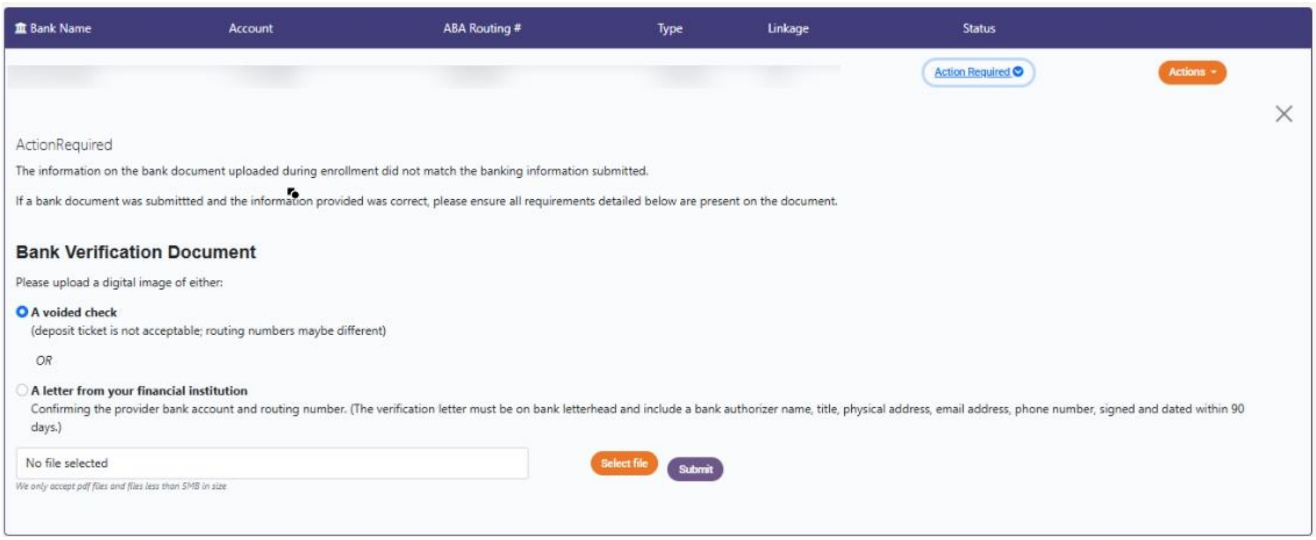
Updating Bank Document

If the account associated with an Enrollment has an Action Required that results in requiring a new bank document, click the **Action Required** link. This will result in the banking information selection to expand and provide an option to choose the bank document type and upload an additional file.

The provider will be required to submit a digital copy of a Bank Verification Document during this portion of the enrollment. [The provider should review the requirements carefully to avoid delays](#).

The document(s) associated must be in a PDF format. If any issues arise while trying to upload the document, or there is a general error when attempting to submit the Enrollment request, please refer to our [FAQ section](#).

After selecting the file, click **Submit** for the updated document to associate with the request.



Action Required – Post Enrollment Decline

If a provider has had a Decline associated with their previously active Enrollment, the contact will need to review the automated e-mail sent from PayeeHub. There will be information advising of the issue and what step(s) need to be taken for resolution.
If issue is due to a payment failure, the contact should speak with their bank and reach out to [Customer Support](#) to advise if the Enrollment should be Cancelled to add a new request or sent to the Payer once more if resolved.

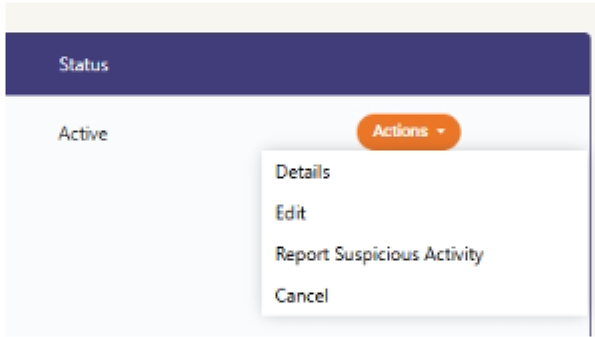
How to Manage Enrollment (s)

Report Suspicious Activity

If an Active Enrollment has a bank account that has had suspicious activity, a provider may utilize the portal to notify PayeeHub who will then request the Payer prioritize cancelling the associated bank account due to fraud-related activities.

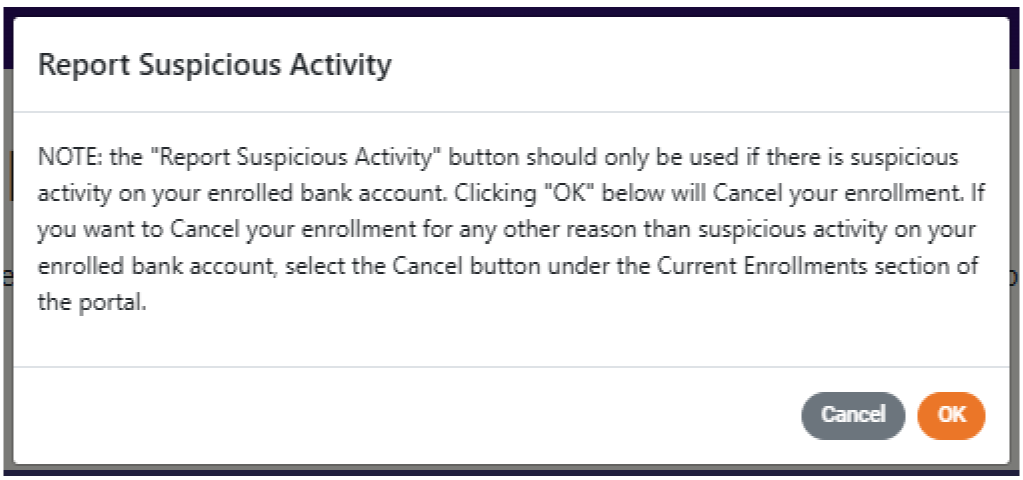
Click the **Actions** Button, then **Report Suspicious Activity**.

NOTE: This measure should be used when suspicious activity has occurred, not as a general method to cancel an account.



A confirmation screen will pop up, click **OK** to proceed or **Cancel** to return to close request without further action.

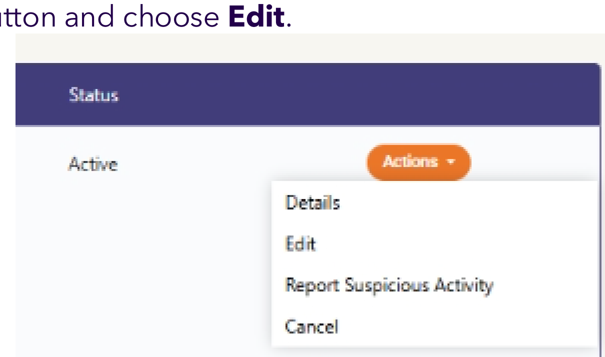
NOTE: You may receive a call from a PayeeHub agent to confirm your request. An e-mail will be sent to the contact on record notifying them once the suspected bank account information has been forwarded to the Payer(s).



Changing Enrollment Type

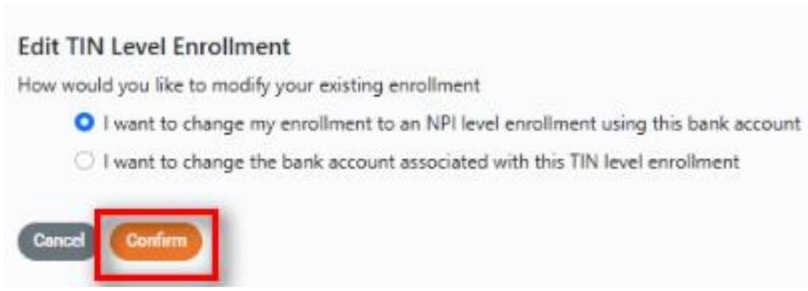
TIN to NPI

Click on the **Actions** button and choose **Edit**.



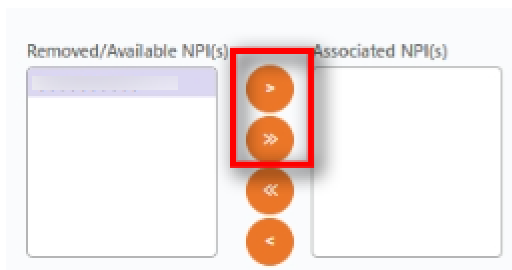
The banking information tab will expand and have two options for modifying your existing enrollment.

Choose **I want to change my enrollment to an NPI level enrollment using this bank account** and then **Confirm**.



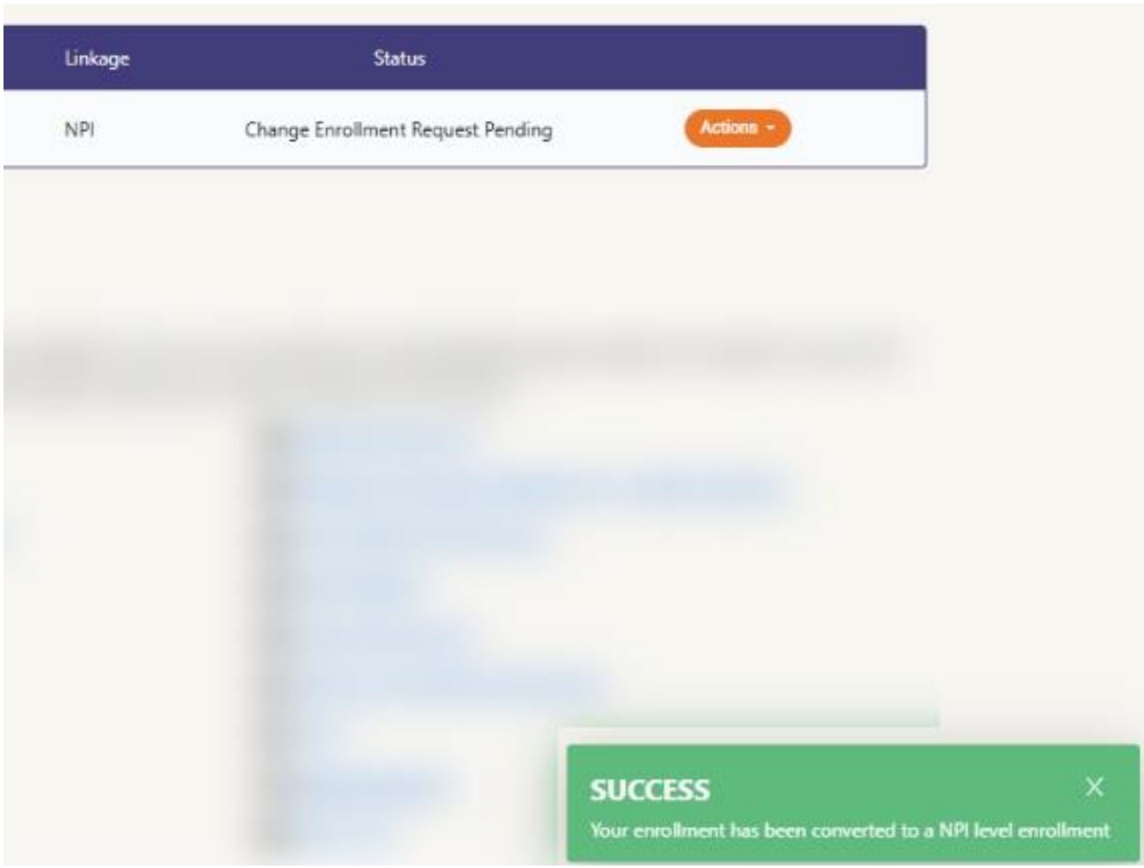
An additional section will display where the contact should list any NPI to be associated with the specific bank account and click the **Add NPI** button.

Each added NPI will populate in the **Removed/Available NPI(s)** list. These will need to be selected and, utilizing the arrows between the subsections, moved over to the **Associated NPI(s)** list.



Confirm all NPIs desired to be associated are listed accordingly and click **Submit**.

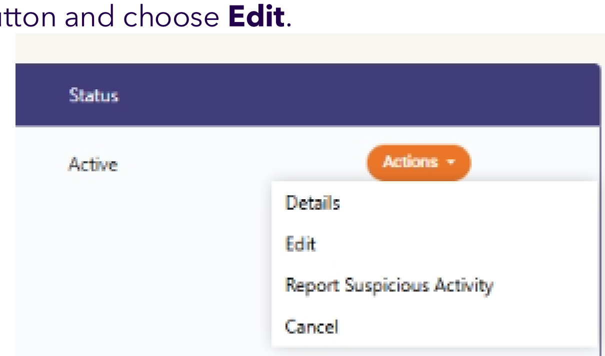
Once complete, a green box will appear in the lower right-hand corner advising of SUCCESS and the Status of that specific Enrollment request will now show Change Enrollment Request Pending.



Once the change has been completed, the contact will receive an e-mail confirmation and the status in the portal will now display **Active** again.

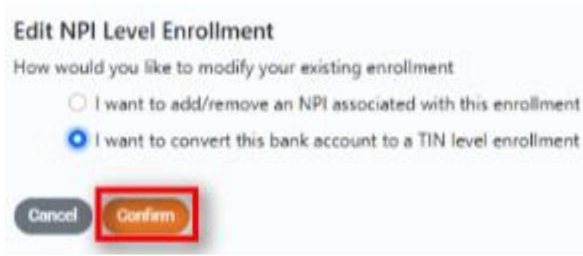
NPI to TIN

Click on the **Actions** button and choose **Edit**.

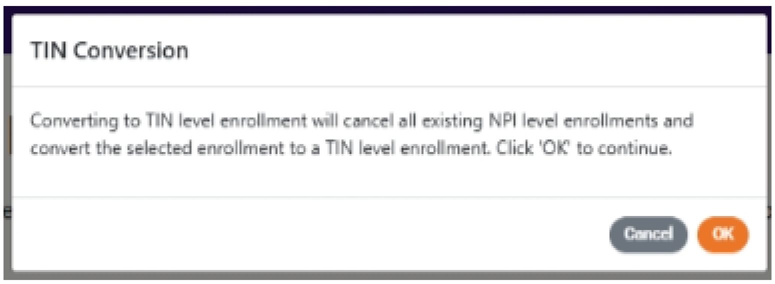


The banking information tab will expand and have two options for modifying your existing enrollment.

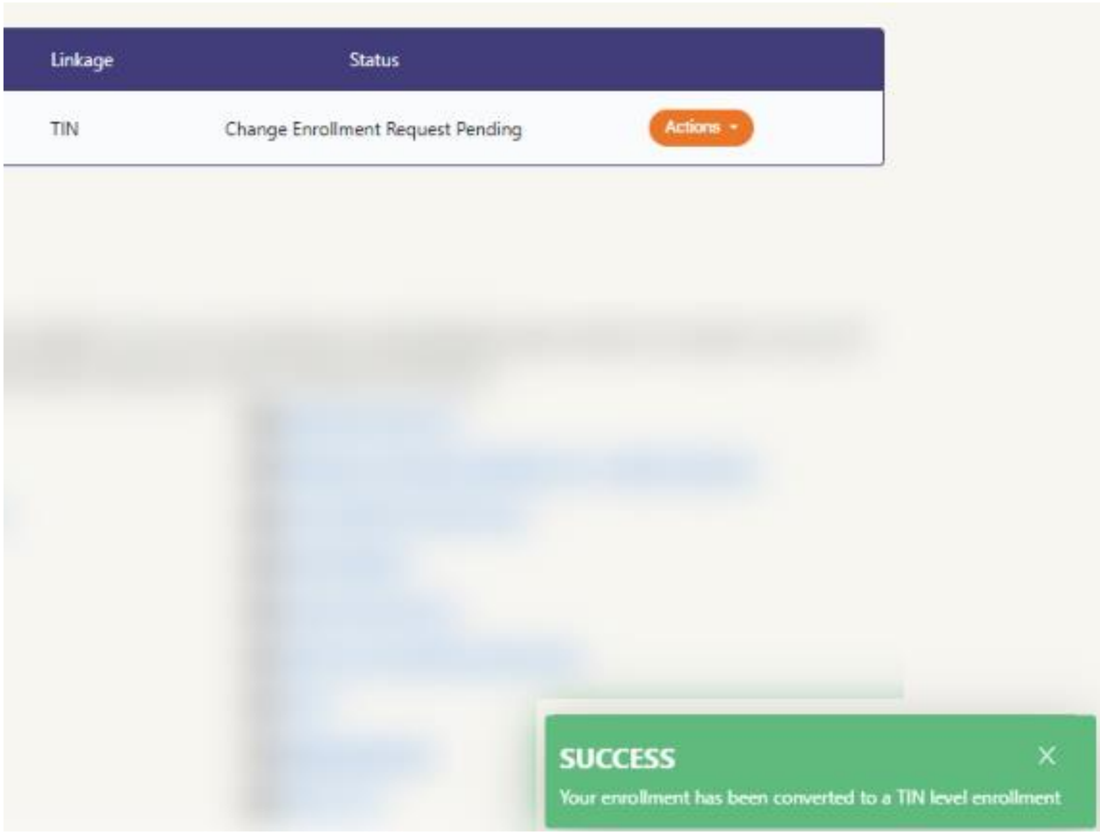
Choose **I want to convert this bank account to a TIN level enrollment** and then **Confirm**.



An additional message will be displayed with a notification about the impact a TIN level enrollment request will have on any current NPI level enrollments.



Once complete, a green box will appear in the lower right-hand corner advising of SUCCESS and the Status of that specific Enrollment request will now show Change Enrollment Request Pending.



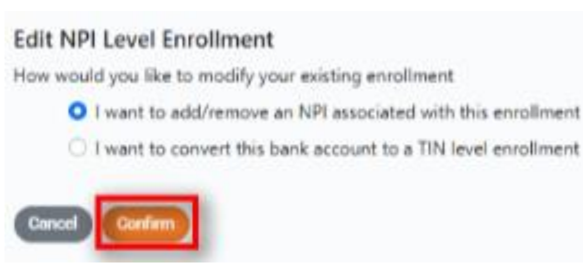
Once the change has been completed, the contact will receive an e-mail confirmation and the status in the portal will now display **Active** again.

NPI Level Edits

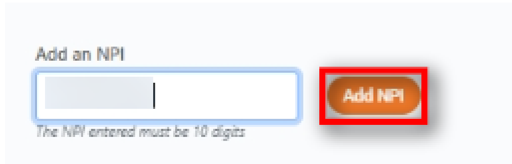
Add/Remove NPI to a Pending Bank Account

Click on the **Actions** button and choose **Edit**. The banking information tab will expand and have two options for modifying your existing enrollment.

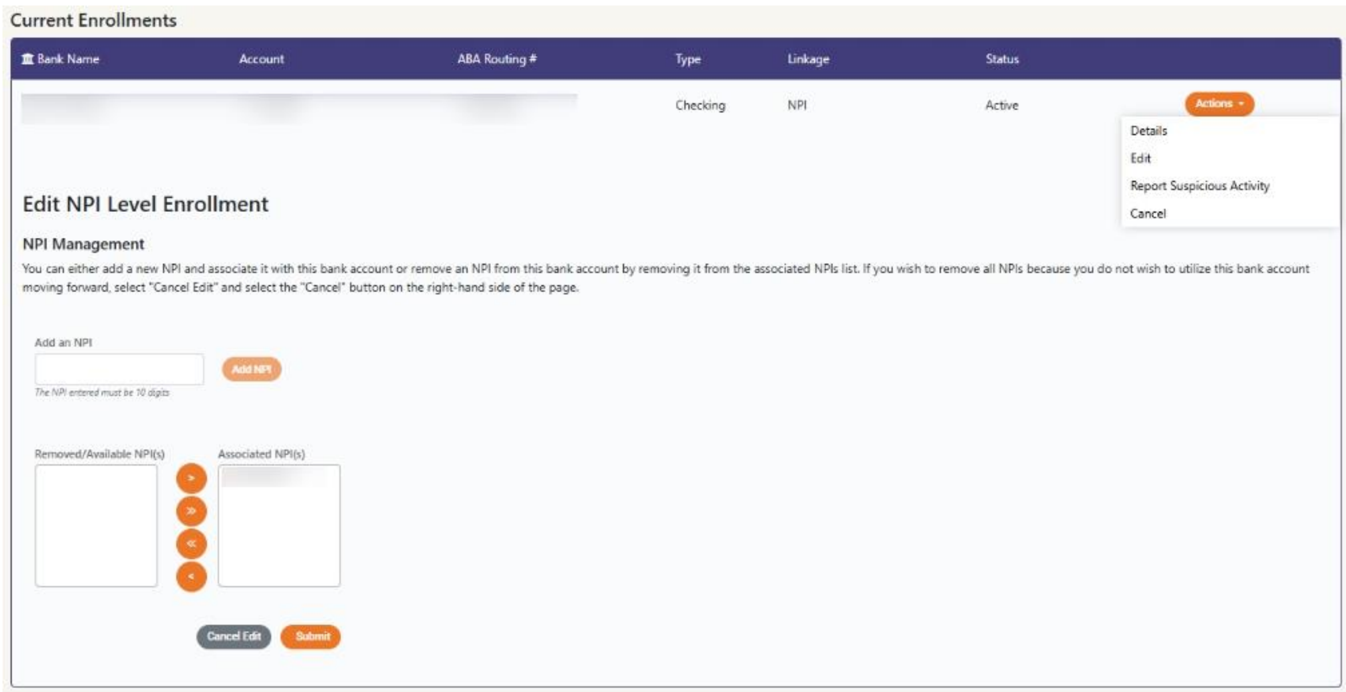
Choose **I want to add/remove an NPI associated with this enrollment** and then **Confirm**.



An additional section will display where the contact should list any additional NPI(s) to be associated with the specific bank account and click the **Add NPI** button.



Each added NPI will populate in the **Removed/Available NPI(s)** list. These will need to be selected and, utilizing the arrows between the subsections, moved over to the **Associated NPI(s)** list.



The Status will now read as Change Enrollment Request Pending until the updated roster is submitted to the Payer and they have responded to the request.

Linkage	Status
NPI	Change Enrollment Request Pending

Add Additional Bank Account(s)

Click the **Enroll More** button under the current list

It will follow the same steps under How to Submit 1st Enrollment, with already having NPI enrollment type selected.

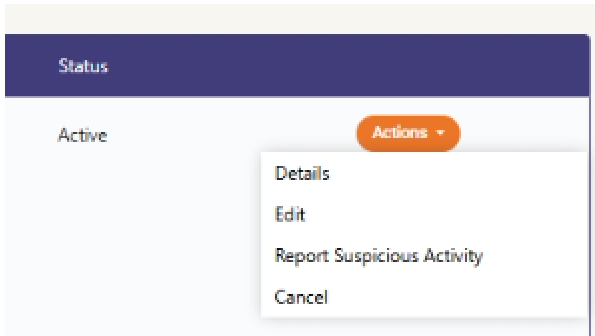
NOTE: Unique NPIs may only be associated with one non-cancelled enrollment request.

Updating Banking Information

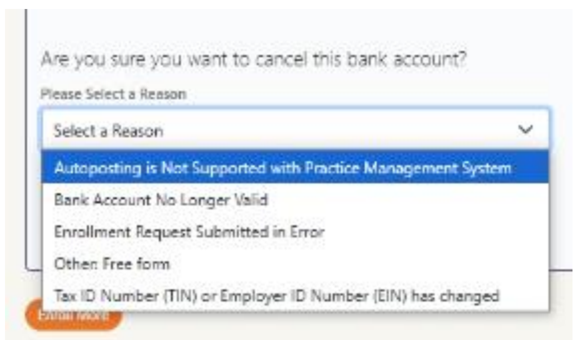
You will need to CANCEL the current Enrollment request. Once the Status appropriately reflects CANCELLED, you can use the ADD BANK button to complete a new submission. Please refer to How to Manage Enrollment(s) – Cancellation for a walkthrough on completing the original action.

Cancellation

Click on the **Actions** button and choose **Cancel**.



The selected bank will expand and now include an additional drop down menu to **Select a Reason** for cancelling the account.



Once the Cancellation has been completed, the contact will receive an e-mail confirmation and the status in the portal will now display **Cancelled**.