

# Enrollment User Reference Manual

## Content

Enrollment Frequently Asked Questions.....	2
How to Request Registration for Enrollment.....	3
Registering a Dental Provider? .....	3
Provide Tax ID Number (TIN) or Employer ID Number (EIN).....	4
Provide Practice and Contact Information.....	5
Upload Copy of W-9 Form .....	5
Review Information Provided.....	6
Registration: Next Steps.....	6
Completing Registration.....	7
Choosing Username and Security Questions .....	7
Creating a Password.....	7
How to Login and Logout.....	8
How to Login.....	8
How to Reset Password or Recover Account Name.....	9
How to Logout .....	9
How to Submit Enrollment for Enrollment.....	10
Selecting Enrollment Type .....	10
NPI Level Enrollment .....	15
Enrollment Submitted: Next Steps.....	19
How to Manage Enrollment .....	20
Edit Enrollment .....	20
TIN Level Edits .....	20
NPI Level Edits .....	22
Suspend Enrollment .....	24
Cancel Enrollment.....	24

## Enrollment Frequently Asked Questions

### **Is a National Provider Identifier (NPI) required to register for Enrollment Portal username and password?**

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 the Registration and Enrollment?**

Registration is the process a provider follows to request access to the Enrollment Portal.

Once registered for the Enrollment Portal, the provider can setup their login credentials and start their enrollment process for their bank account(s).

### **How would a provider know if their registration was successful?**

The provider's request for registration must be verified prior to enrolling their bank account. Once verified, the provider will be sent an email with instructions on how to create their login credentials for the Enrollment Portal. Providers should allow 5 to 7 business days for this process to be completed.

### **How would a provider know if their enrollment was successful?**

Providers can check the status of their bank account(s) via the Enrollment Portal. After a provider has submitted their bank account enrollment, the Enrollment Portal will display the status of their enrollment.

### **How would a billing company or third-party biller enroll on behalf of their providers?**

Enrollment does not support registration or enrollment from billing companies nor third party billing agencies at this time.

### **How can a provider get assistance with their registration or enrollment (e.g. Getting started, updating account information or primary contact, etc...)?**

The provider can contact the Support team by calling (877) 882-0384, Monday through Friday 9:00 am to 8:00 pm, EST for questions related to registration and enrollment.

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

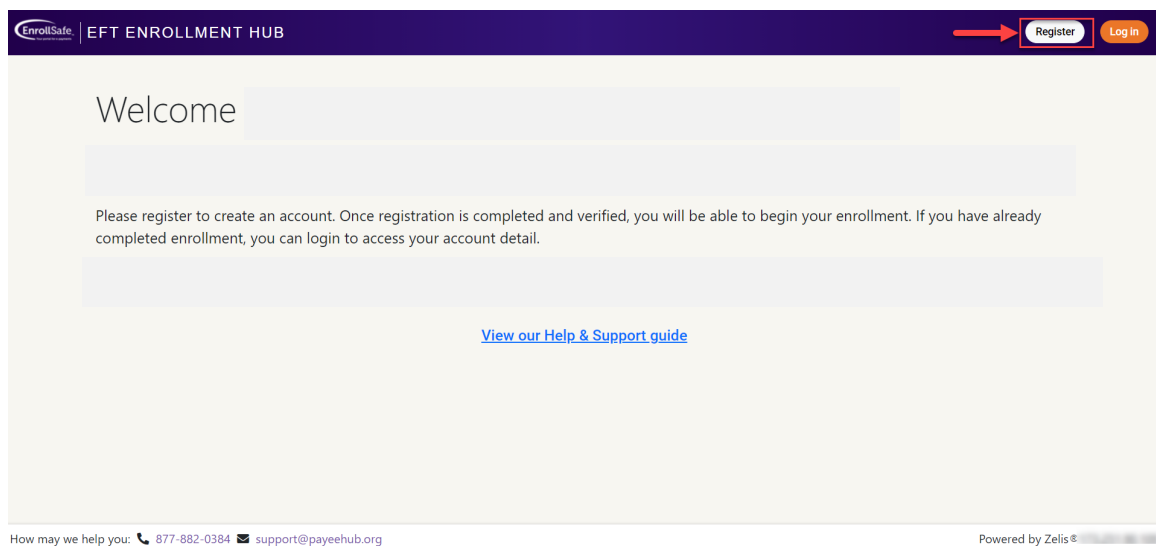
The provider should contact their local Provider Experience Representative for further assistance.

## How to Request Registration for Enrollment

The provider submitting the Enrollment registration should be authorized to make payment related decisions for the practice. Enrollment does not support registrations or enrollments from billing companies nor third party billing agencies.

To register, the provider creates an account with Enrollment to become verified. Once verified, the provider may select the bank account they wish to receive their ACH payments. The provider must register and submit their enrollment requests directly through the Enrollment EFT Enrollment Hub.

Once the provider has selected the **Register** link at the top of the screen, they will be walked through a series of steps to obtain the information needed to complete their registration.



### 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.

**EnrollSafe** | EFT ENROLLMENT HUB Home

1 2 3 4

Verify TIN or EIN Provider Information Upload W-9 Form Review & Submit

### Step 1

**Are you a Dental Provider?** ←

In order for us to provide you the best registration experience, we need to first understand what kind of provider you are.

☐ Yes, I am a Dental Provider

☐ No, I am not a Dental Provider

**Confirm**

How may we help you: ☎ 877-882-0384 ✉ support@payeehub.org

Powered by Zelis®

## Provide 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.

Once verified, the provider will select **Continue**.

Only one registration can be completed per Tax ID Number (TIN). The provider will receive on-screen instructions if their TIN has already been utilized to initiate a registration.

**EnrollSafe** | EFT ENROLLMENT HUB Home

1 2 3 4

Verify TIN or EIN Provider Information Upload W-9 Form Review & Submit

### Step 1

**Let's see if your Tax ID Number (TIN) or Employer ID Number (EIN) is in our system** ←

**TIN or EIN Verification**

In order to continue, we need to verify if your TIN or EIN is located in our system.  
Only the primary assignee of the TIN or EIN will be permitted to register.

Tax ID Number(TIN or EIN)

**Verify**

Provider TIN should be exactly 9 characters

**Continue**

How may we help you: ☎ 877-882-0384 ✉ support@payeehub.org

Powered by Zelis®

## Provide Practice and Contact Information

The provider populates the **Provider Information** and **Provider Contact Information** fields. Required fields are indicated with an \*. Once completed, the provider selects **Continue**.

The screenshot shows the 'Step 2' of the enrollment process. The header indicates the current step is 'Provider Information' (Step 2 of 4). The page is titled 'Step 2: Let's collect some information about you'. It is divided into two main sections: 'Provider Information' and 'Provider Contact Information'. Red arrows point to the titles of these sections. The 'Provider Information' section includes fields for 'Provider Name \*', 'TIN or EIN \*' (with a pre-filled value '453454334'), 'NPI (I)', 'Street \* (I)', 'Street (continued)', 'City \*', 'State \*' (a dropdown menu), and 'Zipcode \*'. The 'Provider Contact Information' section includes fields for 'First Name \*', 'Last Name \*', 'Title \*', 'Phone \*', 'Email \*', and 'Confirm Email \*'. A red box highlights the 'Continue' button at the bottom right. A 'Go Back' button is at the bottom left. The footer contains contact information and a 'Powered by Zella' logo.

## Upload Copy of W-9 Form

For security purposes, the provider is required to submit a W9 associated with the TIN or EIN being enrolled. The provider should ensure the W9 being submitted is signed and dated within the last 6 months.

The provider selects **Select File** to open the file explorer window in their browser and locate the appropriate file. Once attached, the provider selects **Continue**.

The screenshot shows 'Step 3' of the enrollment process. The header indicates the current step is 'Upload W-9 Form' (Step 3 of 4). The page is titled 'Step 3: Upload your W-9 Form for verification purposes'. A red arrow points to this title. Below the title, it says 'Upload W-9' and 'In order to continue, we need you to upload your W-9 form so that we can use this in our provider verification process'. There is a text input field for 'W9.pdf' and a red arrow points to the 'Select this' button next to it. Below the input field, it says 'We only accept pdf files and files less than 5MB in size'. A green checkmark icon and the text 'File uploaded' are visible. At the bottom, there are 'Go Back' and 'Continue' buttons. The footer contains contact information and a 'Powered by Zella' logo.

## Review Information Provided

The provider 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**.

**Step 4**  
Please review the information provided before you submit your request

**Provider Information**  
 Provider Name:  
 TIN or EIN:  
 NPI:  
 Street:  
 Street(continued):  
 City:  
 State:  
 Zip:  
 Dental Provider:  
 W9 File:  
 File Name:  
 File Size:

**Provider Contact Information**  
 First Name:  
 Last Name:  
 Title:  
 Telephone Number:  
 Email Address:

[Go Back](#) [Submit](#)

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis

## 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 back to the Welcome Page.

**Thank you for registering!**  
 Your registration request has been submitted for review. Please allow 5-7 business days for your request to be finalized.

**Next Steps**  
 Your registration information is being reviewed for verification purposes.

If approved, you will receive a registration code via email with a link to complete your registration.

If we cannot validate the information provided, you will receive an email notification with instructions to resubmit your request.

[Back to Welcome Page](#)

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis

Note: The provider will be sent an email with instructions on how to create their login credentials within 5 to 7 business days.

## Completing Registration

### Choosing Username and Security Questions

Email instructions will direct the provider to confirm their user account and complete registration. The provider will be asked to choose a 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.

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**.

**Complete your registration**  
Please review your registration information below for accuracy

Provider Information		Provider Contact Information	
Provider Name:	Brandon UAT 3	First Name:	Brandon
TIN or EIN:	42164234	Last Name:	UAT3
NPI:	1111111111	Title:	admin
Street:	123 Test Street	Telephone Number:	(123) 123-1234
Street/continued:	Suite 4	Email Address:	brandon.mcgauley@zalis.com
City:	Test City		
State:	FL		
Zip:	43208		
Dental Provider:	Yes		

**Create a Username**

Username:  [Check Username](#)

Username requires a minimum of 8 alphanumeric characters

✓ Username is available

**Select Your Security Questions**

Question 1:  What is your pet's name?  Answer 1:  Ido

Question 2:  What is the make and model of your first car?  Answer 2:  Ford Pinto

**Site Agreement**

☒ I agree to the Site Agreement [Finish Registration](#)

How may we help you? 877-882-0368 support@paywithub.org

Powered by Zalis®

### Creating a Password

After the provider has finished registering, they should receive an 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 provider has now completed their registration and are ready to submit their enrollment(s). The provider will select please click **here** to login.

### Create Password

User Name

Password (Password must be at least 14 characters long)


Confirm Password

Submit



### Create Password Confirmation

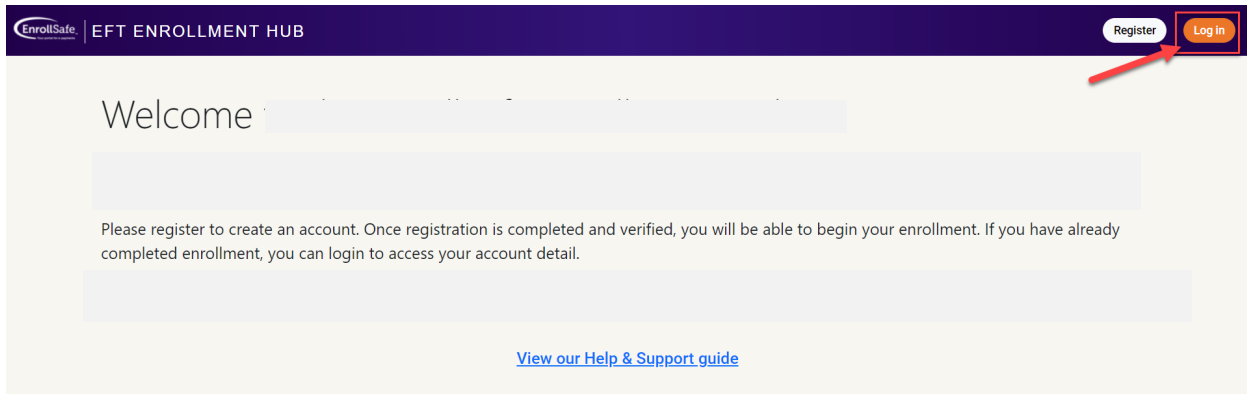
Your password was successfully created.

Please click [here](#) to login. 

## How to Login and Logout

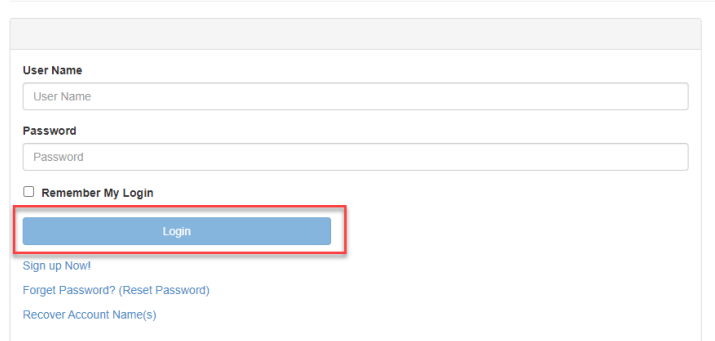
### How to Login

The provider will go to <https://Enrollment.payeehub.org> and will be directed to the Enrollment Welcome screen. From the Welcome screen the provider will select **Login**.



The provider will type their credentials in the Username and Password fields provided and click **Login**. After they are successfully logged in, the provider will be redirected to their Enrollment homepage.





User Name

User Name

Password

Password

☐ Remember My Login

Login

[Sign up Now!](#)

[Forgot Password? \(Reset Password\)](#)

[Recover Account Name\(s\)](#)

## How to Reset Password or Recover Account Name

The provider will go to the Login page and click **Forgot Password? (Reset Password)** link to have the reset instructions sent to them by email. When the email is received the provider will follow the instructions provided.

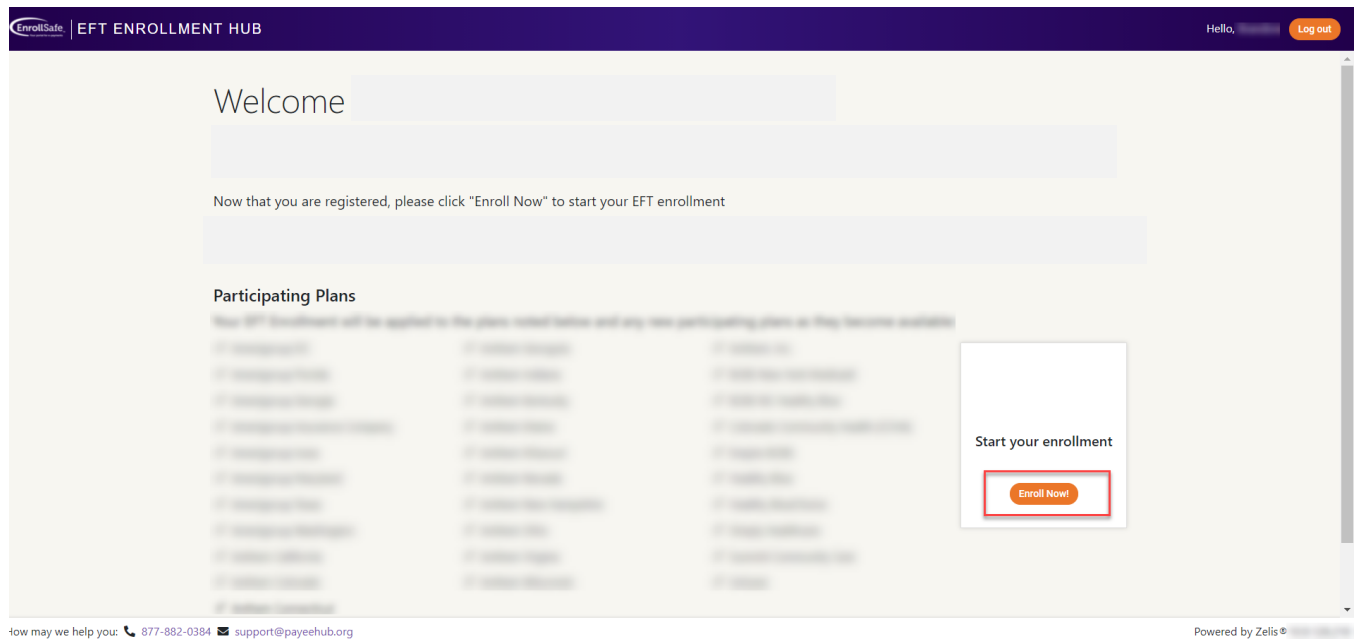
## How to Logout

The **Logout** button is located in the upper-right hand corner of the Enrollment Portal.



## How to Submit Enrollment for Enrollment

Once the provider has successfully logged in, they will be able to start their enrollment(s) by selecting **Enroll Now!**



## Selecting Enrollment Type

The following sections of this manual will provide step-by-step instructions on how to complete one of the following enrollment types:

### **Option 1:** Provider Tax Identification Number (TIN) or Employer ID Number (EIN) – Recommended

The provider will select this option if the bank account will receive reimbursements for all providers associated with the TIN or EIN specified when the provider set up their profile. All providers with this TIN or EIN will enroll using a single bank account.

### **Option 2:** National Provider Identifier (NPI)

The provider will select this option if multiple bank accounts under this TIN or EIN will be enrolled and associated to specific Billing NPI(s). The provider will be asked to map the NPI(s) they want to associate to the bank account(s) provided during the enrollment process.

The provider 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.

The screenshot shows the 'EFT ENROLLMENT HUB' interface. At the top, there's a progress bar with four steps: 1. Enrollment Type, 2. Provider Information, 3. Bank Information, and 4. Review & Finish. Step 1 is currently active. Below the progress bar, the title 'Step 1' is followed by 'Tax Identification Number (TIN) or Employer ID Number (EIN) Verification'. A sub-header states: 'In order to continue, we need to verify and see if your TIN or EIN is located in our system.' Below this, there's a 'TIN or EIN Verification' section with a text input field and a red-bordered button labeled 'Verify TIN or EIN'. A small note below the input field says: 'The TIN or EIN entered should match the TIN or EIN provided during registration.' At the bottom of the page, there's a footer with contact information: 'How may we help you? 877-882-0384 support@payeehub.org' and 'Powered by Zelis'.

## TIN Level Enrollment

### Step 1: Selecting Enrollment Type

The provider will select the **TIN Level Enrollment** option if the bank account will receive reimbursements for all providers associated with the TIN or EIN specified when the provider set up their profile. All providers with this TIN or EIN will enroll using a single bank account.

Once selected, the provider will select **Continue**.

The screenshot shows the 'EFT ENROLLMENT HUB' interface. At the top, there's a progress bar with four steps: 1. Enrollment Type, 2. Provider Information, 3. Bank Information, and 4. Review & Finish. Step 1 is currently active. Below the progress bar, the title 'Step 1' is followed by 'Select your enrollment type'. A sub-header states: 'Please indicate the provider's preference for the level of EFT enrollment'. Below this, there are two radio button options. The first option is 'Provider Tax Identification Number (TIN) or Employer ID Number (EIN) - Recommended', which is selected. Its description says: 'Select this option if the bank account will receive reimbursements for ALL providers associated with the TIN or EIN specified when you setup your profile. All providers with this TIN or EIN will be paid using a single bank account.' The second option is 'National Provider Identifier (NPI)', which is not selected. Its description says: 'Select this option if multiple bank accounts under this TIN or EIN will be enrolled and associated to specific Billing NPI(s). You will be asked to map the NPI(s) you want to associate to the bank account(s) provided during your enrollment.' At the bottom right of the form, there is a red-bordered button labeled 'Continue'. At the bottom of the page, there's a footer with contact information: 'How may we help you? 877-882-0384 support@payeehub.org' and 'Powered by Zelis'.

## Step 2: Provider Information

The provider will be asked to review the Practice and Contact Information submitted during registration.

Once reviewed, the provider will select **Continue**.

**Step 2**

Please review the registered provider information and provider contact information for accuracy.  
Contact PayeeHUB support at 877-882-0384 if a change to the primary contact is needed.

**Provider Information**

Provider Name:  
TIN or EIN:  
NPI:  
Street:  
Street(continued):  
City:  
State:  
Zip:  
Dental Provider:

**Provider Contact Information**

First Name:  
Last Name:  
Title:  
Telephone Number:  
Email Address:

[Go Back](#) [Continue](#)

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis®

## Step 3: Banking Information

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 provider will select **Add Bank Account** when ready to proceed and click **Continue**.

**Step 3**

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

[Add Bank Account](#)

[Go Back](#) [Continue](#)

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis®

Since the provider has chosen a TIN or EIN level enrollment, they will only be required to complete this form once. The Bank Verification Document must be in PDF format and be less than 5MB in size.

Once all required fields have been entered, the provider will select **Add Bank Account**.

**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 \* ✓

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.)

Bank Doc.pdf **Select file**

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

✓ **File uploaded**

**Associated NPI(s) for this Bank Account**

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

**Cancel Add Bank Account**

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis

The provider will be asked to review the bank account information entered and select **Continue**. If any of the information is incorrect, the provider selects **Go Back**.

**Enrollment Type** **Provider Information** **Bank Information** Review & Finish

**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	Type	Linkage	Status
Bank of America	1234567890123456	Checking	Yes	Active

**Add Bank Account**

**Go Back Continue**

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis

The provider will review the information they have entered for accuracy. Once completed, the provider will review the agreement and then click the **I Agree to the Terms of Service** checkbox, then click **Submit**.

**Step 4**  
**Review & Submit Your Enrollment**  
 Please review the information below for accuracy. Select the Edit button next to the section to make any adjustments.

**Provider Information** [Edit](#)

Provider Name: Brandon UAT 3  
 TIN or EIN: 43384314  
 NPI: 111111111  
 Street: 123 Test Street  
 Street (continued): Suite 4  
 City: Test City  
 State: PM  
 Zip: 43206  
 Dental Provider: Yes

**Provider Contact Information** [Edit](#)

First Name: Brandon  
 Last Name: UAT3  
 Title: admin  
 Telephone Number: (123) 123-1234  
 Email Address: brandon.mcgauley@tells.com

**Enrollment Details** [Edit](#)

Enrollment Type: TIN

**Banking Information** [Edit](#)

Bank Name	Account	Type	Linage	Status
Bank of America	*****0001	Checking	TIN	Not Sent

**Terms of Service**

☐ I Agree to the Terms of Service

[Click here for printer friendly version](#)

[Go Back](#) [Submit](#)

A confirmation message will display to let the provider know that the enrollment process is complete. The provider will click **Finish** to be directed to the homepage.

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

[Finish](#)

## NPI Level Enrollment

If the NPI level enrollment is selected, the provider will be asked to verify each NPI they would like associated with their enrollment. This information must match the TIN or EIN submitted during registration. Any NPIs added during enrollment must be allocated to a specific bank account. If the provider does not intend to enroll an NPI in EFT, it should not be added during this step.

The provider populates the NPI in the appropriate field and selects **Add NPI**. If an incorrect NPI is added, the provider can remove it by selecting **Remove**. Once all NPIs have been added, the provider selects **Continue**.

**Step 1**

**Select your enrollment type**  
Please indicate the provider's preference for the level of EFT enrollment

☐ **Provider Tax Identification Number (TIN) or Employer ID Number (EIN) - Recommended**  
Select this option if the bank account will receive reimbursements for ALL providers associated with the TIN or EIN specified when you setup your profile. All providers with this TIN or EIN will be paid using a single bank account.

☒ **National Provider Identifier (NPI)**  
Select this option if multiple bank accounts under this TIN or EIN will be enrolled and associated to specific Billing NPI(s). You will be asked to map the NPI(s) you want to associate to the bank account(s) provided during your enrollment.

NPI Verification  
  
The NPI entered must be 10 digits

**Add NPI**

Approved NPI(s)  
  
**Remove**

**Continue**

How may we help you: 877-882-0384 | support@payeehub.org

Powered by Zella

The provider will be asked to review the Practice and Contact Information submitted during registration. Once reviewed, the provider selects **Continue**.

**Step 2**

**Please review the registered provider information and provider contact information for accuracy.**  
Contact PayeeHUB support at 877-882-0384 if a change to the primary contact is needed.

**Provider Information**

Provider Name:   
 TIN or EIN:   
 NPI:   
 Street:   
 Street(continued):   
 City:   
 State:   
 Zip:   
 Dental Provider:

**Provider Contact Information**

First Name:   
 Last Name:   
 Title:   
 Telephone Number:   
 Email Address:

**Go Back** **Continue**

How may we help you: 877-882-0384 | support@payeehub.org

Powered by Zella

The provider will submit the Banking Information for their enrollment(s). 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 provider will select **Add Bank Account**.

The screenshot shows the 'EFT ENROLLMENT HUB' interface. At the top, a progress bar indicates four steps: 1. Enrollment Type, 2. Provider Information, 3. Bank Information (current step), and 4. Review & Finish. Below the progress bar, the heading 'Step 3' is followed by 'Banking Information', which is highlighted with a red arrow. A red box surrounds the 'Add Bank Account' button. Below this button are 'Go Back' and 'Continue' buttons. The footer contains contact information: 'How may we help you: 877-882-0384 support@payeehub.org' and 'Powered by Zelis'.

If the provider has chosen the NPI level enrollment, they will enter as many bank accounts as required until all NPIs provided have been allocated. The Bank Verification Document must be in PDF format and be less than 5MB in size. Once all required fields have been entered, the provider will select **Add Bank Account**.



**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 \*  
 ✓

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.)

Bank Doc.pdf

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

✓ File uploaded

**Associated NPI(s) for this Bank Account**

Available NPI(s)  
 4324324324

Associated NPI(s)  
 2342343243  
 3423432432

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis

Once the provider has submitted at least one bank account for an NPI level enrollment, the box on the right-hand side of the screen will advise which NPI(s) remain to be distributed. The provider will select the **Add Bank Account** button and repeat the steps detailed above until there are no remaining NPI(s).

**Enrollment Type** **Provider Information** **Bank Information** **Review & Finish**

**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	Type	Linkage	Status	
Bank of America	****	Checking	OK	Active	<input type="button" value="Remove"/>

NPIs left to distribute:

How may we help you: 877-882-0384 support@payeehub.org Powered by Zelis

Once all required bank accounts are displayed, the provider will select **Continue** to review and submit their enrollment.

EnrollSafe | EFT ENROLLMENT HUB TIN Hello, Log out

1 Enrollment Type 2 Provider Information 3 Bank Information 4 Review & Finish

### 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	Type	Linkage	Status	
Bank of America	****1234	Checking	TIN	Not Sent	Remove

NPIs left to distribute:

Add Bank Account

Go Back Continue

How may we help you? 877-882-0384 support@payeehub.org Powered by Zelis® 10.9.128.218

The provider will review the information they have entered for accuracy. Once completed, the provider should review the Terms of Service, click the **I Agree to the Terms of Service** checkbox, then click **Submit**.

EnrollSafe | EFT ENROLLMENT HUB Hello, Brandon Log out

1 Enrollment Type 2 Provider Information 3 Bank Information 4 Review & Finish

### Step 4

#### Review & Submit Your Enrollment

Please review the information below for accuracy. Select the Edit button next to the section to make any adjustments.

##### Provider Information

Provider Name: Brandon UAT 3  
 TIN or EIN: 453454334  
 NPI: 1111111111  
 Street: 123 Test Street  
 Suite 4  
 City: Test City  
 State: PM  
 Zip: 45206  
 Dental Provider: Yes

##### Provider Contact Information

First Name: Brandon  
 Last Name: UAT3  
 Title: admin  
 Telephone Number: (123) 123-1234  
 Email Address: brandon.mcguire@zellis.com

##### Enrollment Details

Edit  
 Enrollment Type: TIN

##### Banking Information

Edit

Bank Name	Account	Type	Linkage	Status	
Bank of America	*****0001	Checking	TIN	Not Sent	Details

A confirmation message will display to let the provider know that the enrollment process is complete. The provider will click **Finish** to be directed to the homepage.

**You've successfully submitted your enrollment!**

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

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

[Finish](#)

How may we help you: ☎ 877-882-0384 ✉ support@payeehub.org

Powered by Zelis®

## Enrollment Submitted: Next Steps

All enrollments are subject to a two-step verification process. Provider should allow 5 to 7 business days for this process to be completed.

After the provider has submitted their enrollment, the Enrollment homepage will display the status of any enrollments associated with the account.

Once verified, the "Status" field associated with each enrollment will be updated from **Enrollment Request Pending** to **Active**.

**Welcome**

The EnrollSafe EFT Enrollment Hub enables you to enroll in electronic funds transfer (EFT) processing for all participating plans in one simple and easy-to-use portal.

View, manage and add additional EFT enrollments below.

**Current Enrollments**

Bank Name	Account	Type	Linkage	Status
Bank of America	123456789	Checking	Yes	Enrollment Request Pending

[Details](#) [Cancel](#)

**Participating Plans**

These EFT enrollments will be applied to the plans listed below and any new participating plans as they become available.

- Enrollment Plan 1
- Enrollment Plan 2
- Enrollment Plan 3
- Enrollment Plan 4
- Enrollment Plan 5
- Enrollment Plan 6
- Enrollment Plan 7
- Enrollment Plan 8
- Enrollment Plan 9
- Enrollment Plan 10
- Enrollment Plan 11
- Enrollment Plan 12
- Enrollment Plan 13
- Enrollment Plan 14
- Enrollment Plan 15
- Enrollment Plan 16
- Enrollment Plan 17
- Enrollment Plan 18
- Enrollment Plan 19
- Enrollment Plan 20

How may we help you: ☎ 877-882-0384 ✉ support@payeehub.org

Powered by Zelis®

## How to Manage Enrollment

Once an enrollment has been accepted by the payor(s), the provider will be able to perform the following action(s) directly through the Enrollment portal:

- 1.) View Details
- 2.) Edit
- 3.) Suspend Enrollment
- 4.) Cancel Enrollment

For security purposes, if the provider needs to make any changes to the contact information provided during the registration process (e.g. Name, Email Address, Phone Number, etc...), they must contact the Support team at (877) 882-0384 for assistance.

Note: Any user account that is suspected of irregular activity by the Support team will be flagged for review and subsequently locked for access.

### Edit Enrollment

A provider can edit an existing enrollment once it is in an Active status. The types of edits that can be made to an enrollment will vary based on the enrollment type (TIN level or NPI level).

#### TIN Level Edits

Edits to a TIN level enrollment will be limited to the following options:

**Option 1:** Changing an existing TIN level enrollment to an NPI level using the current bank account

The provider will select **Edit** and choose the radio button indicating: "I want to change my enrollment to an NPI level enrollment using this bank account" and will select **Confirm** to continue.

The screenshot shows the 'Current Enrollments' table with columns: Bank Name, Account, Type, Linkage, and Status. A row is highlighted with 'TIN' under Type and 'Active' under Status. To the right of this row are buttons: Details, Edit, Suspend, and Cancel. The 'Edit' button is highlighted with a red box. Below the table, a modal titled 'Edit TIN Level Enrollment' is open. It contains the text 'How would you like to modify your existing enrollment' and two radio button options. The first option, 'I want to change my enrollment to an NPI level enrollment using this bank account', is selected and highlighted with a red arrow. The second option is 'I want to change the bank account associated with this TIN level enrollment'. At the bottom of the modal are 'Cancel' and 'Confirm' buttons, with the 'Confirm' button highlighted by a red box.

The provider will then be prompted to add an NPI or NPI(s) that they would like to associate to the existing bank account.

Note: Only payer-approved NPIs can be associated to the existing enrollment.

Once the provider chooses the NPI(s) to associate to the existing bank account, the provider can select **Submit**. The enrollment status will then be updated to **Change Enrollment Requested** and the enrollment information will be submitted to the payer(s) for approval.

**Current Enrollments**

Bank Name	Account	Type	Linkage	Status	
[Redacted]	[Redacted]	[Redacted]	TIN	Active	<a href="#">Details</a> <a href="#">Edit</a> <a href="#">Suspend</a> <a href="#">Cancel</a>

**Edit TIN Level Enrollment** ✕

**Convert to NPI Level Enrollment**

You can add a new NPI and associate it with this bank account. In order to move forward, you will need to associate at least one NPI to this enrollment.

Add an NPI

[Add NPI](#) →

The NPI entered must be 10 digits

Removed/Available NPI(s) Associated NPI(s) →

➤

➤ ➤ ➤ ➤ ➤ ➤ ➤ ➤ ➤ ➤

[Cancel Edit](#) [Submit](#)

### **Option 2:** Changing the bank account information associated with the existing enrollment

The provider will select **Edit** and choose the radio button indicating: "I want to change the bank account associated with this TIN level enrollment" and will select **Confirm** to continue.

The screenshot shows a table titled "Current Enrollments" with columns: Bank Name, Account, Type, Linkage, and Status. A row shows "Bank of America", "\*\*\*\*\*1111", "Checking", "TIN", and "Active". To the right of this row are buttons: "Details", "Edit", "Suspend", and "Cancel". The "Edit" button is highlighted with a red box. Below the table, a modal titled "Edit TIN Level Enrollment" is open. It asks "How would you like to modify your existing enrollment" and has two radio button options. The first option is "I want to change my enrollment to an NPI level enrollment using this bank account". The second option, "I want to change the bank account associated with this TIN level enrollment", is selected and highlighted with a red arrow. At the bottom of the modal are "Cancel" and "Confirm" buttons, with "Confirm" highlighted by a red box.

Bank Name	Account	Type	Linkage	Status
Bank of America	*****1111	Checking	TIN	Active

**Edit TIN Level Enrollment**

How would you like to modify your existing enrollment

☐ I want to change my enrollment to an NPI level enrollment using this bank account  
☒ I want to change the bank account associated with this TIN level enrollment

A prompt will appear, indicating that a bank account change will require the provider to submit a new enrollment request. The provider must select **OK** to continue and can reference the steps noted in **Step 3: Bank Information** of the guide to add the account information.

Note: The existing enrollment will remain **Active** until the new enrollment request has been accepted by the payer(s). All new enrollment requests are subject to a two-step verification process. Provider should allow 5 to 7 business days for this process to be completed.

## NPI Level Edits

Edits to a TIN level enrollment will be limited to the following options:

### Option 1: Adding or removing an NPI from the existing enrollment

The provider will select **Edit** and choose the radio button indicating: "I want to add/remove an NPI associated with this enrollment" and will select **Confirm** to continue.

The screenshot shows a modal titled "Edit NPI Level Enrollment". It asks "How would you like to modify your existing enrollment" and has two radio button options. The first option, "I want to add/remove an NPI associated with this enrollment", is selected and highlighted with a red arrow. The second option is "I want to convert this bank account to a TIN level enrollment". At the bottom of the modal are "Cancel" and "Confirm" buttons, with "Confirm" highlighted by a red box.

**Edit NPI Level Enrollment**

How would you like to modify your existing enrollment

☒ I want to add/remove an NPI associated with this enrollment  
☐ I want to convert this bank account to a TIN level enrollment

Once the provider chooses the NPI(s) to add or remove from the existing bank account, the provider can select **Submit**. The enrollment status will then be updated to **Change Enrollment Requested** and the enrollment information will be submitted to the payer(s) for approval.

Once approved, the status will be updated to **Active**.

Note: Only payer-approved NPIs can be associated to the existing enrollment.

**Edit NPI Level Enrollment**

**NPI Management**

You can either add a new NPI and associate it with this bank account or remove an NPI from this bank account by removing it from the associated NPIs list. If you remove all NPIs from this bank account and click 'Confirm', you will be asked to acknowledge cancelling this EFT Enrollment.

Add an NPI

**Add NPI**

The NPI entered must be 10 digits

Removed/Available NPI(s)

Associated NPI(s)

1111111111  
4444444444

**Cancel Edit** **Submit**

**Option 2:** Changing an existing NPI level enrollment to a TIN level using the selected bank account

The provider will select **Edit** and choose the radio button indicating: "I want to add/remove an NPI associated with this enrollment" and will select **Confirm** to continue.

**Edit NPI Level Enrollment**

How would you like to modify your existing enrollment

☒ I want to add/remove an NPI associated with this enrollment

☐ I want to convert this bank account to a TIN level enrollment

**Cancel** **Confirm**

A prompt will appear, indicating that converting the selected enrollment to a TIN level will result in a cancellation of all other NPI level enrollments that were previously submitted. The provider must select **OK** to continue. The enrollment status will then be updated to **Change Enrollment Requested** and the enrollment information will be submitted to the payer(s) for approval.

## Suspend Enrollment

In the event fraudulent account activity is suspected by the provider, an immediate suspension request can be submitted by selecting the Suspend button. The provider will be prompted to confirm the suspension before any action is taken.

### Current Enrollments

Bank Name	Account	Type	Linkage	Status	
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active	Details Edit <b>Suspend</b> Cancel

Selecting **OK** will update the enrollment status to **Suspension Request Pending**. An immediate notification will be sent to the Support team to alert the payer(s) of the request to suspend.

Bank Name	Account	Type	Linkage	Status	
Bank of America	*****0005	Savings	TIN	Suspend Request Pending	Details Cancel

The payer(s) will be responsible to perform the bank account suspension to prevent further payments from being dispersed to the compromised account. A confirmation will be provided to the Support team once successful. The enrollment status will be updated to **Suspended** upon confirmation.

Note: The provider must contact Support directly to request the reactivation of their enrollment. If fraudulent activity is suspected on multiple bank accounts and/or the user account is compromised, the provider can request a complete account lock to prevent further access.

## Cancel Enrollment

A provider can cancel their enrollment at any time, by selecting the **Cancel** button under the **Current Enrollments** section of the portal.

### Current Enrollments

Bank Name	Account	Type	Linkage	Status	
[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active	Details Edit Suspend <b>Cancel</b>



Once the **Cancel** button is selected, the provider will be prompted to confirm the cancellation. Selecting **OK** will update the enrollment status to **Cancel Enrollment Request Pending** and the information will be sent to the payer(s) for approval.

Bank Name	Account	Type	Linkage	Status	
				Cancel Enrollment Request Pending	<a href="#">Details</a>

Upon confirmation of cancellation by the payer(s), the enrollment status will display as **Cancelled**.

Bank Name	Account	Type	Linkage	Status	
				Cancelled	<a href="#">Details</a>

For more information or additional questions regarding the Enrollment Hub portal, the provider can contact the Support team by calling (877) 882-0384, Monday to Friday 9:00 am to 8:00 pm, EST.