EnrollSafe Help & Support Guide

Quick Task Finder

If you want to...	Go to...
Learn how EnrollSafe works	Understanding EnrollSafe
Register for portal access	Register for Portal Access
Create your login credentials	Create Login Credentials
Submit your first EFT enrollment	Submit Your First EFT Enrollment
View your current enrollment information	View Enrollment Details
Replace banking information	Replace Banking Information
Change your enrollment from TIN to NPI (or NPI to TIN)	Change Enrollment Type
Add or remove NPIs from an enrollment	Manage NPI Associations
Add another bank account	Add Additional Bank Accounts
Cancel an enrollment	Cancel an Enrollment
Report suspicious banking activity	Report Suspicious Activity
Resolve an Action Required request	Resolve Action Required
Troubleshoot technical issues	Common Technical Issues
Contact PayeeHub Support	Contact Support
Find accepted document requirements	Appendix A – Accepted Documentation
Review enrollment status definitions	Appendix B – Enrollment Status Reference

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Welcome

Purpose

Welcome to the **EnrollSafe Help & Support Guide**.

This guide provides step-by-step instructions for registering with EnrollSafe, enrolling in Electronic Funds Transfer (EFT), and managing your enrollment after it has been established. Whether you are accessing EnrollSafe for the first time or returning to update your banking information, this guide is intended to help you complete common tasks quickly and confidently.

Throughout this guide, you'll find information about:

- Registering for portal access
- Creating login credentials
- Submitting your first EFT enrollment
- Managing existing enrollments
- Replacing banking information
- Resolving common enrollment issues
- Contacting Support when additional assistance is needed

The procedures in this guide reflect the current functionality of the EnrollSafe portal at the time of publication.

Who Should Use This Guide

This guide is intended for authorized individuals responsible for managing Electronic Funds Transfer (EFT) enrollment on behalf of a healthcare provider or practice.

Typical users include:

- Practice Administrators
- Office Managers
- Revenue Cycle Management staff
- Billing Office personnel
- Provider Finance staff
- Third-party billing companies authorized to manage EFT enrollment

Users should be authorized to make payment-related decisions for the Tax Identification Number (TIN) associated with the provider organization.

How to Use This Guide

The EnrollSafe Help & Support Guide is organized around the tasks providers perform most frequently rather than the screens displayed within the portal.

If you are new to EnrollSafe, we recommend reading the guide in the following order:

1. **Understanding EnrollSafe**
2. **Register for Portal Access**
3. **Create Login Credentials**
4. **Submit Your First EFT Enrollment**

If you are already registered and need to perform a specific task, use the **Quick Task Finder** or the Table of Contents above to navigate directly to the appropriate section.

Whenever possible, procedures focus on the business task being completed rather than describing every element of the user interface. This approach makes the guide easier to follow and more resilient to future interface updates.

Part 1 – Learn

1. Understanding EnrollSafe

What is EnrollSafe?

EnrollSafe is a secure online portal that enables healthcare providers to register for Electronic Funds Transfer (EFT) and manage banking information for participating Health Plans.

The portal provides a centralized experience for establishing and maintaining EFT payment instructions throughout the enrollment lifecycle. Authorized provider contacts can use EnrollSafe to register for portal access, submit new enrollments, update existing banking information, manage enrollment changes, and monitor enrollment status.

By centralizing these activities, EnrollSafe helps simplify EFT enrollment while providing visibility into the status of submitted requests.

Registration vs. Enrollment

Although the terms are sometimes used interchangeably, **Registration** and **Enrollment** are two separate processes within EnrollSafe.

Registration

- Registration establishes access to the EnrollSafe portal.
- During registration, an authorized provider contact submits identifying information for the provider organization, uploads the required IRS W-9, and requests permission to access the portal.
- Registration allows the provider contact to create login credentials after approval.
- Registration does not establish EFT payments.

Enrollment

- Enrollment is the process of submitting banking information for Electronic Funds Transfer (EFT).
- After logging into EnrollSafe, the authorized provider contact submits banking information, uploads a bank verification document, and electronically signs the enrollment request.
- Once approved by the participating Health Plan, the enrollment becomes Active and EFT payments may begin according to the Health Plan's implementation schedule.

Important

Registration must be completed and approved before an EFT enrollment can be submitted.

Enrollment Levels

EnrollSafe supports two enrollment levels.

The appropriate option depends on how your organization wants EFT payments to be managed.

TIN-Level Enrollment

A TIN-Level enrollment associates a single bank account with the entire Tax Identification Number (TIN).

Use this option when all providers associated with the TIN should receive EFT payments through the same bank account.

Characteristics

- One bank account is associated with the entire TIN.
- All participating NPIs under the TIN use the same banking information.
- Simplifies enrollment management for organizations using a single payment account.

NPI-Level Enrollment

An NPI-Level enrollment allows individual National Provider Identifiers (NPIs) to be associated with different bank accounts.

Use this option when different providers or practice locations require payments to be directed to different bank accounts.

Characteristics

- Multiple bank accounts may be associated with the same TIN.
- Individual NPIs are assigned to specific bank accounts.
- Each NPI may only be associated with one active bank account at a time.

Enrollment Lifecycle Overview

Every enrollment progresses through a series of statuses while it is reviewed and processed.

A typical enrollment lifecycle is:

1. Registration Approved
2. Enrollment Submitted
3. Pending Review
4. Active

If additional information is required during processing, the enrollment may temporarily move to an **Action Required** status until the requested information has been received and reviewed.

When an enrollment change is submitted, such as replacing banking information or changing the enrollment type, the existing enrollment continues to follow its current status until the new request completes processing.

Business Rules

The following business rules apply throughout the EnrollSafe portal.

- Only one authorized Provider Contact may be associated with each Tax Identification Number (TIN).
- Registration must be completed before an EFT enrollment can be submitted.
- Bank verification documents must be uploaded in PDF format.
- Each NPI may only be associated with one active bank account at any given time.
- A TIN-Level enrollment and an NPI-Level enrollment cannot both be active for the same enrollment scope simultaneously.
- Replacing banking information does not require cancelling the existing enrollment before submitting the replacement request.
- Enrollment requests are subject to review and approval by participating Health Plans.

Important

EnrollSafe enrollments replace all historical EFT enrollments maintained by participating Health Plans for the enrolled Tax Identification Number (TIN).

If submitting a TIN + NPI enrollment, ensure that all desired TIN + NPI combinations are included in the enrollment request. Any TIN + NPI combination that is not included will receive payment using the participating Health Plan's alternate payment method.

Depending on the participating Health Plan, the alternate payment method may include Virtual Credit Card, Zelis ACH+, or Check, which may result in third-party service fees.

Common Enrollment Statuses

The EnrollSafe portal displays the current processing status for each enrollment.

Status	Description
Pending	The enrollment has been submitted and is awaiting review.
Action Required	Additional information is required before processing can continue.
Active	The enrollment has been approved and is available for payment processing.
Change Enrollment Request Pending	A requested enrollment modification is being reviewed.
Cancelled	The enrollment is no longer active.
Declined	The enrollment could not be approved or was subsequently rejected by the participating Health Plan.

Additional details about each status are provided in **Appendix B – Enrollment Status Reference**.

Participating Health Plans

EnrollSafe supports EFT enrollment for participating Health Plans.

The list of participating Health Plans is available after logging into the EnrollSafe portal.

If the Health Plan you are looking for is not listed, it may not currently participate in EnrollSafe. Questions regarding participation should be directed to the applicable Health Plan.

If you are unable to locate your Tax Identification Number (TIN) or National Provider Identifier (NPI) during registration or enrollment, contact the participating Health Plan and request that your provider information be synchronized with EnrollSafe before attempting the process again.

Part 2 – Get Started

2. Register for Portal Access

Overview

Before EFT enrollment can be submitted, an authorized provider contact must first register for access to the EnrollSafe portal.

Registration establishes your organization's portal account and allows you to create login credentials after your registration request has been reviewed and approved.

During registration, you will:

- Verify your organization's eligibility.
- Provide provider and contact information.
- Upload a current IRS W-9.
- Submit your registration request for review.

Important

Registration provides access to the EnrollSafe portal only. It does not establish EFT payments. EFT enrollment is completed after registration has been approved and login credentials have been created.

Before You Begin

Before starting the registration process, ensure you have the following information available.

Required Information

- Tax Identification Number (TIN) or Employer Identification Number (EIN)
- National Provider Identifier (NPI), if applicable
- Current IRS W-9 (PDF format)
- Provider practice information
- Authorized Provider Contact information

Provider Contact Requirements

The Provider Contact should be authorized to make payment-related decisions on behalf of the provider organization.

Only one Provider Contact may be associated with each Tax Identification Number (TIN).

Supported Browser

For the best experience, complete registration using the most recent version of **Google Chrome** on a desktop or laptop computer.

Mobile devices and tablets are not supported.

Registration Process

The registration process consists of five steps.

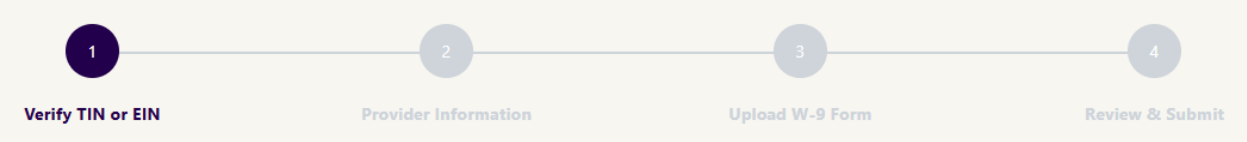


Figure 2-1. Registration workflow.

Step 1 – Verify Provider Type

Begin by identifying whether the provider organization is associated with dental services.

1. Select **Register** from the EnrollSafe home page.
2. Indicate whether the provider is a Dental Provider.
3. Select **Confirm** to continue.

Your selection determines the registration workflow appropriate for your organization.

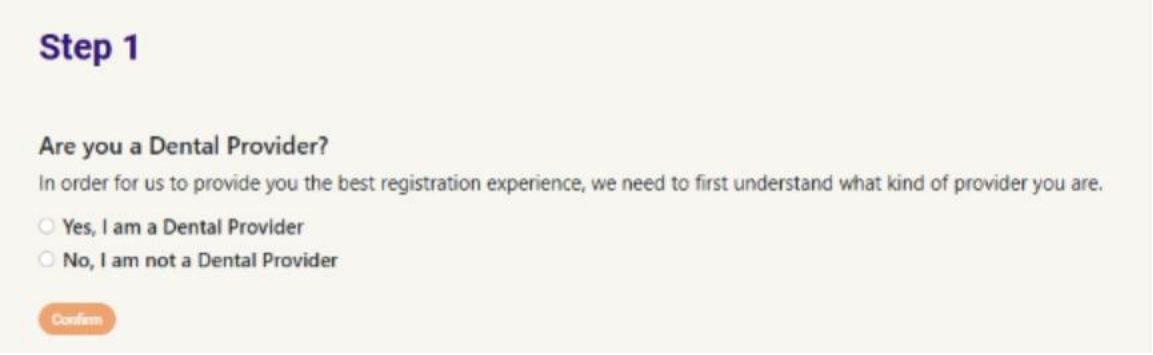


Figure 2-2. Verify Provider Type.

Step 2 – Verify TIN/EIN

Enter your organization's Tax Identification Number (TIN) or Employer Identification Number (EIN).

Select **Verify** to confirm eligibility.

One of the following responses will be displayed:

Result	Description
Verified	Registration can continue.
TIN/EIN Not Found	The participating Health Plan has not yet synchronized your organization with EnrollSafe.
Already Registered	A registration request or existing account is already associated with the TIN/EIN.

If your TIN or EIN cannot be located, contact the participating Health Plan and request that your provider information be synchronized with EnrollSafe before attempting registration again.

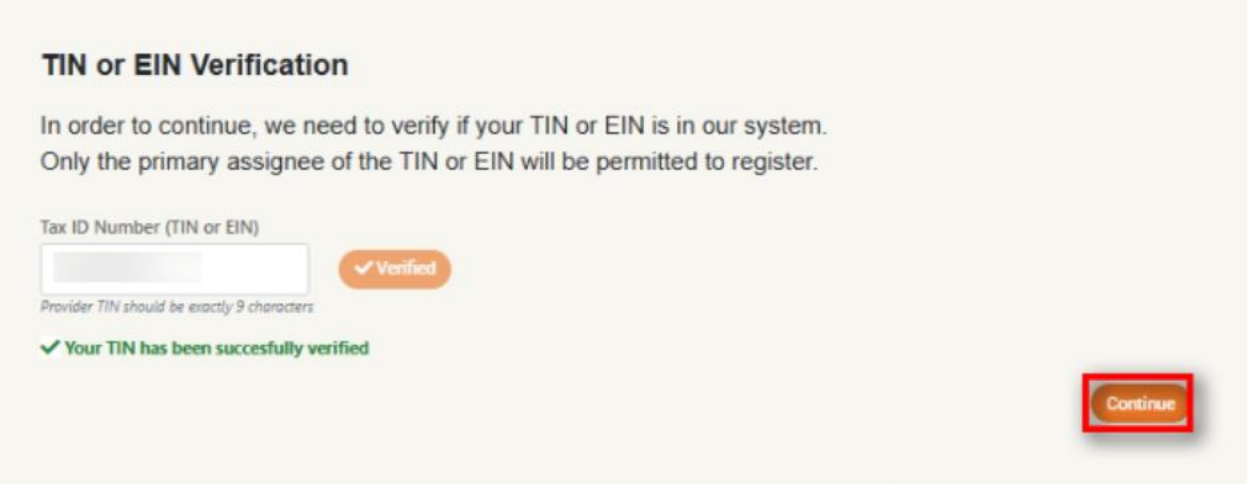


Figure 2-3. Verify TIN/EIN.

Step 3 – Enter Provider Information

Complete the required Provider Information and Provider Contact Information fields. Required fields are identified by an asterisk (*).

The Provider Contact should be the individual authorized to manage EFT enrollment for the organization.

Do not use:

- Initials
- Department names
- Practice names
- Job titles

If one or more NPIs are associated with the provider organization, include them during registration whenever possible.

After completing all required fields, select **Continue**.

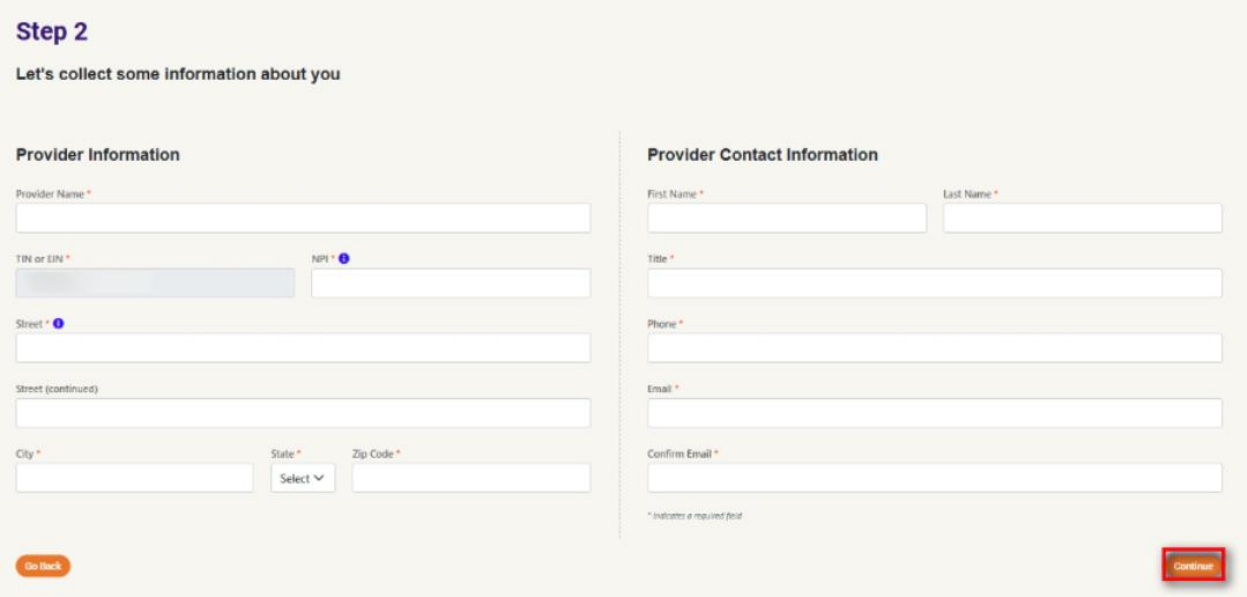


Figure 2-4. Provider Information.

Step 4 – Upload W-9

Upload the current IRS W-9 associated with the TIN or EIN being registered.

The W-9 must:

- Be the **current IRS version**.
- Be completed in full.
- Include the correct TIN.
- Be signed.
- Be dated.
- Be uploaded in PDF format.

Important

The IRS periodically updates Form W-9. EnrollSafe requires the current IRS version of the form to verify provider information. Older or obsolete versions cannot be accepted and may result in your registration request being delayed or declined.

If the document does not meet these requirements, the registration request may be delayed or declined.

After selecting the appropriate document, select **Continue**.

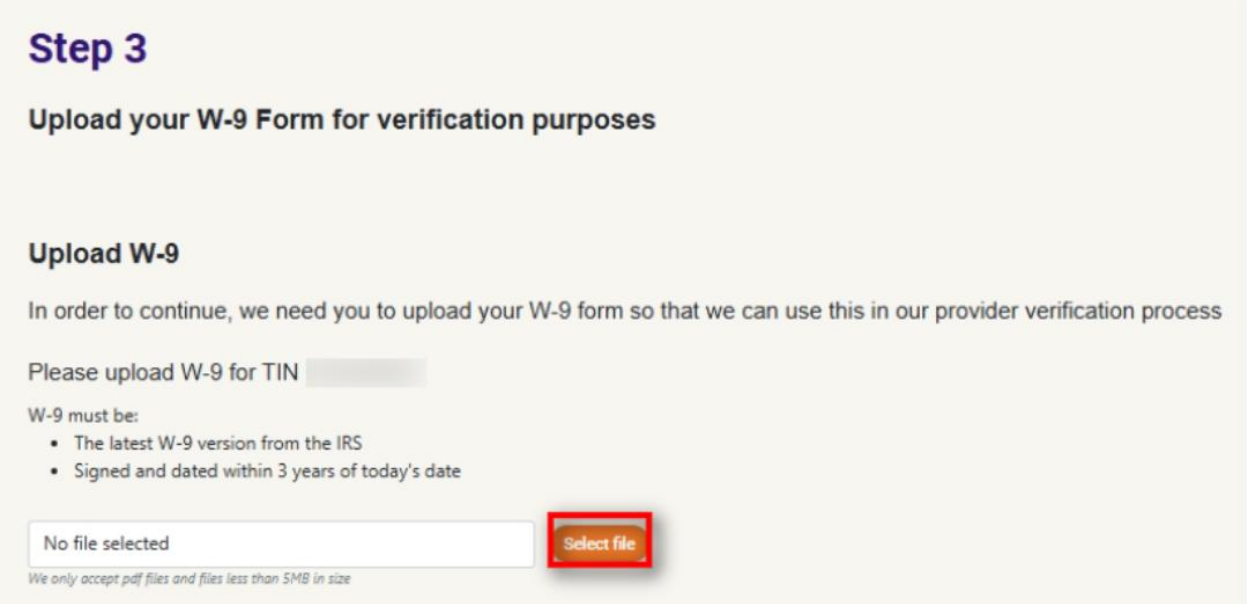


Figure 2-5. Upload W-9.

Step 5 – Review and Submit

Review all information entered during registration before submitting the request.

Verify the accuracy of:

- Provider information
- Provider Contact information
- TIN/EIN
- NPI (if applicable)
- Uploaded W-9

If changes are required, use **Go Back** to return to the appropriate step.

Once submitted, registration information cannot be edited until the request has been reviewed.

When you are satisfied that all information is correct, select **Submit**.

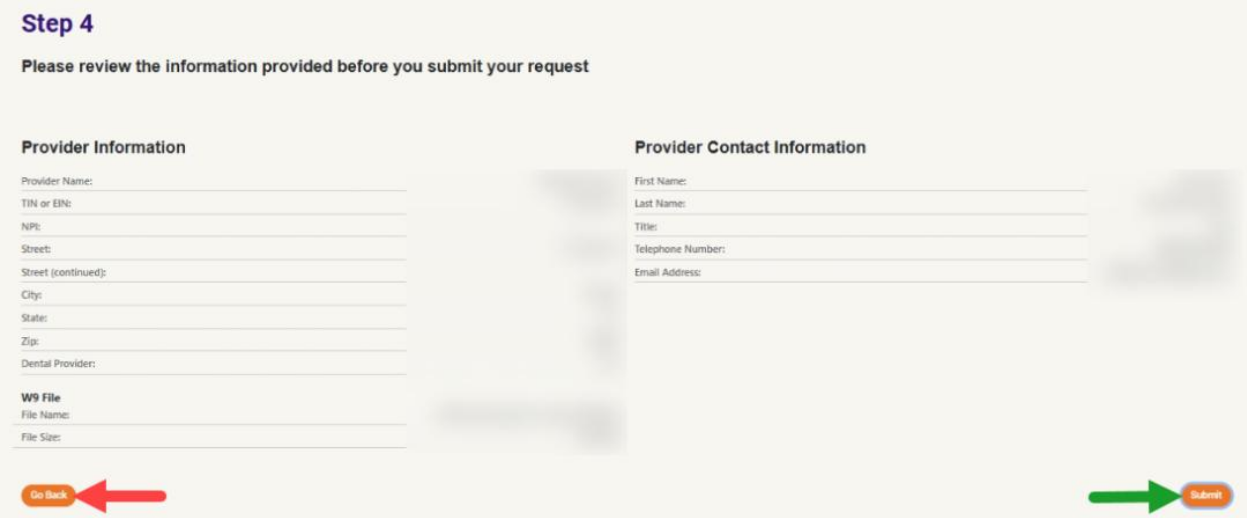


Figure 2-6. Review and Submit Registration.

What Happens Next?

After your registration request has been submitted:

1. The registration enters the review process.
2. The submitted information and supporting documentation are validated.
3. If additional information is required, you may be contacted during the review process.
4. Once the review is complete, an email notification is sent to the Provider Contact.

If the registration is approved:

- You'll receive an email from **help@payeehub.org** with instructions for creating your login credentials.
- After creating your username and password, you can log in to EnrollSafe and submit your first EFT enrollment.

If the registration is declined:

- You'll receive an email describing the reason the request could not be approved.
- Correct the identified issue and submit a new registration request when appropriate.

Next Step

Continue to **Create Login Credentials** after receiving your registration approval email.

3. Create Login Credentials

Overview

After your registration request has been reviewed and approved, you'll receive an email from **help@payeehub.org** with instructions for creating your EnrollSafe login credentials.

Creating login credentials activates your EnrollSafe account and allows you to access the portal to submit and manage EFT enrollments.

Registration approval is required before login credentials can be created.

Create Username

Open the registration approval email and select the registration link provided.
Create a unique username for your EnrollSafe account.

Select **Check Username** to verify that your preferred username is available.

If the username is already in use, enter another username and repeat the availability check until an available username is identified.

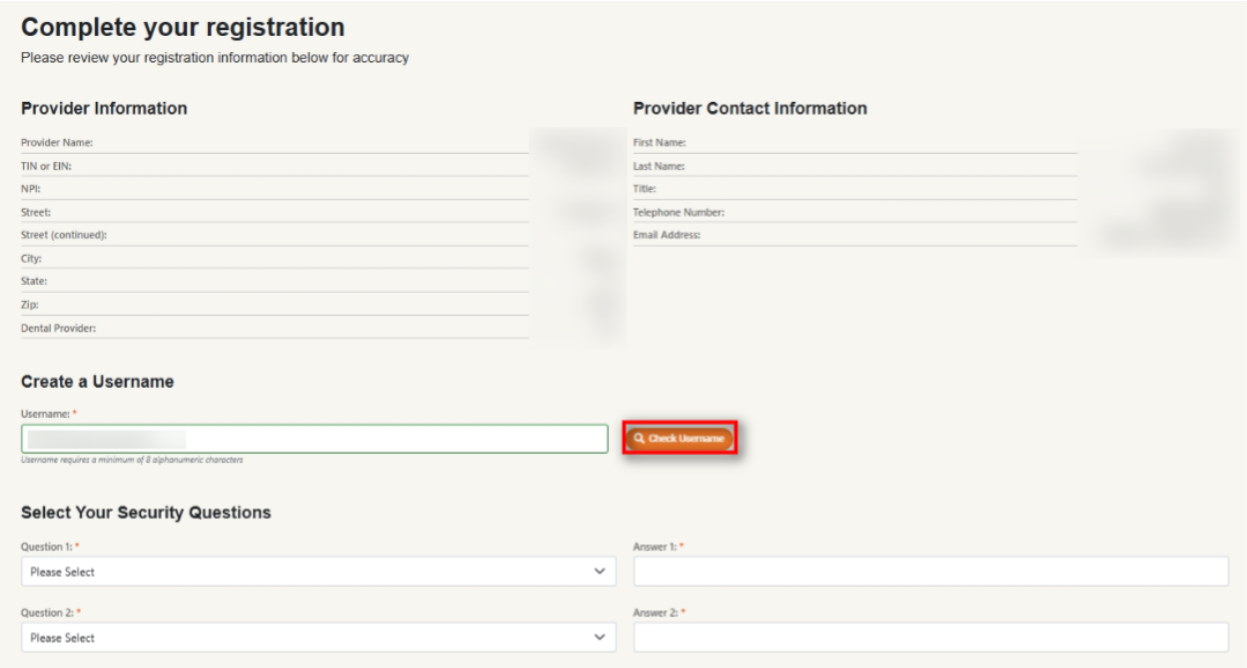


Figure 3-1. Create Username.

Security Questions

Select two security questions from the available list.

Enter an answer for each question.

These questions and answers are used to help verify your identity if account recovery is required in the future.

Choose answers that you can remember but that are not easily guessed by others.

Review Registration Information

Before completing registration, review the information associated with your account. Confirm that the following information is correct:

- Provider name
- Provider Contact
- TIN/EIN
- NPI (if applicable)
- Provider address

If any information is incorrect, do **not** complete registration.

Instead, contact PayeeHub Support for assistance before proceeding.

Accept Site Agreement

Read the EnrollSafe Site Agreement.

After reviewing the agreement:

1. Select the **I Agree** checkbox.
2. Select **Finish Registration**.

By accepting the Site Agreement, you acknowledge the terms governing access to and use of the EnrollSafe portal.

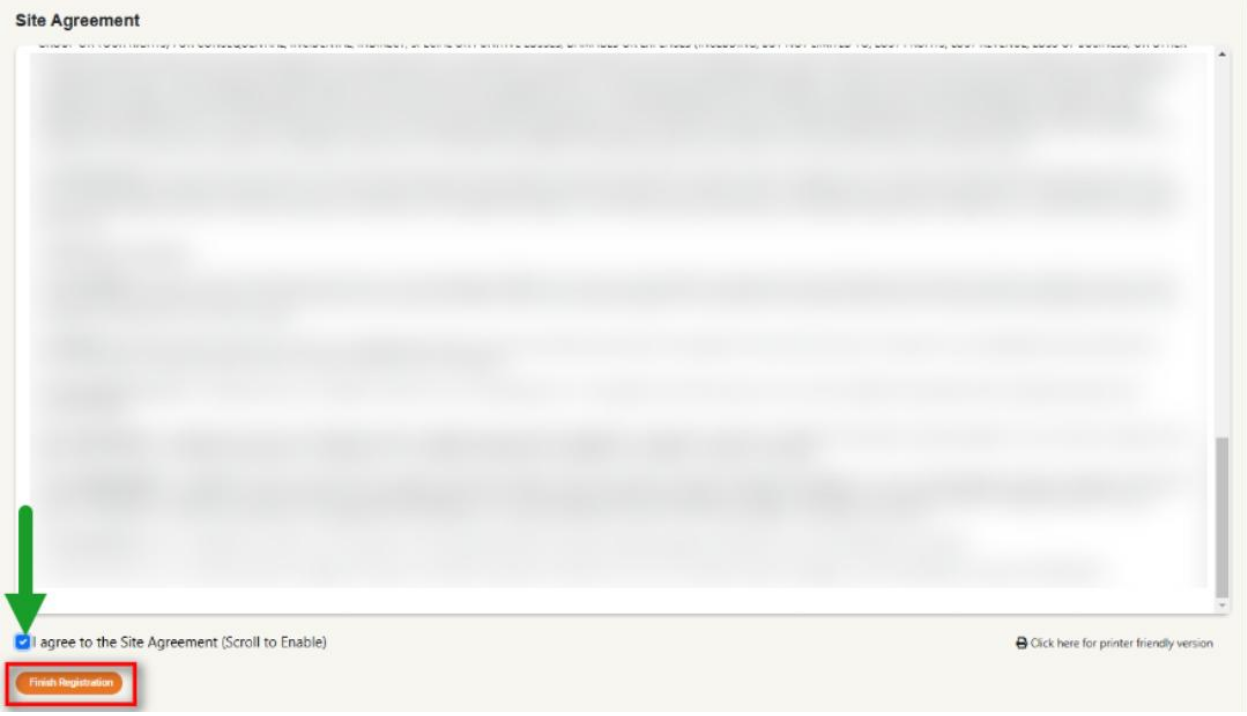


Figure 3-2. Site Agreement.

Create Password

After completing registration, a second email is sent to the Provider Contact requesting that a password be created.

Open the email and select the password creation link.

Enter and confirm your new password.

Select **Create Password** to complete the process.

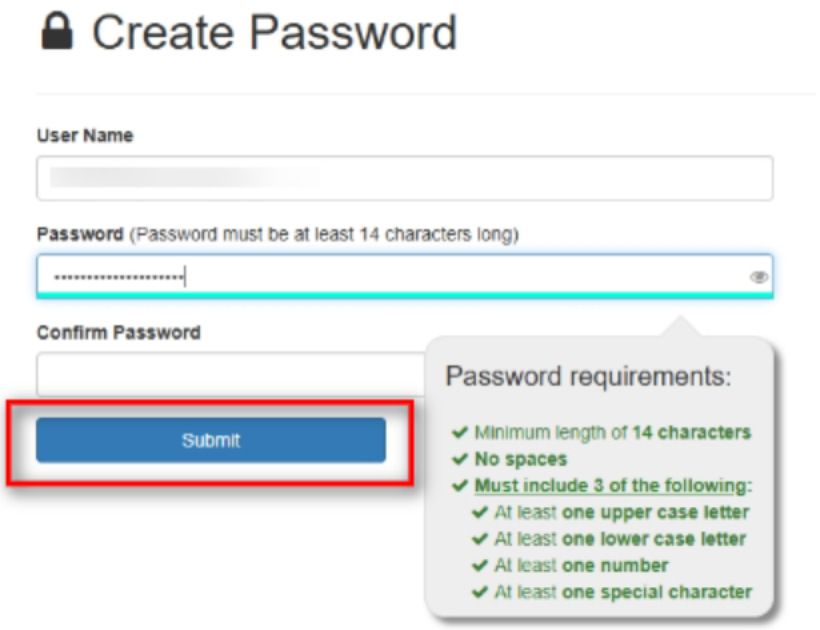


Figure 3-3. Create Password.

Password Requirements

Passwords must meet the EnrollSafe security requirements.

Your password must:

- Be at least 14 characters long.
- Include at least one uppercase letter.
- Include at least one lowercase letter.
- Include at least one number.
- Include at least one special character.
- Not contain spaces.

Choose a password that is unique to your EnrollSafe account and avoid reusing passwords from other applications.

What Happens Next?

After your password has been created:

- Your EnrollSafe account becomes active.
- You can log in using your newly created username and password.
- You may begin the EFT enrollment process.

If you are unable to log in after creating your password, refer to **Common Technical Issues** later in this guide or contact PayeeHub Support.

Next Step

Continue to **Submit Your First EFT Enrollment** to establish EFT payment instructions for your organization.

4. Submit Your First EFT Enrollment

Overview

After your registration has been approved and your login credentials have been created, you are ready to submit your first Electronic Funds Transfer (EFT) enrollment.

An EFT enrollment establishes the banking information that participating Health Plans will use to issue payments electronically.

During the enrollment process, you will:

- Select an enrollment type.
- Review your provider information.
- Enter your banking information.
- Upload a bank verification document.
- Review and electronically sign the enrollment request.
- Submit the enrollment for review.

The enrollment process typically takes approximately 10–15 minutes to complete if all required documentation is available before you begin.

Before You Begin

Before starting your enrollment, confirm that you have the following available:

- Bank routing number
- Bank account number
- Bank verification document in PDF format
- Authorized signer name and title

If enrolling at the NPI level, determine which NPIs should be associated with each bank account before beginning the enrollment process.

Preparing this information in advance will help you complete the enrollment without interruption.

Enrollment Types

Before entering your banking information, you'll choose how the enrollment should be applied to your organization.

The appropriate enrollment type depends on how you want EFT payments to be distributed.

TIN Enrollment

Choose **TIN Enrollment** when all payments associated with the Tax Identification Number (TIN) should be directed to the same bank account.

This option is generally appropriate when:

- The organization uses one operating account for all EFT payments.
- All providers under the TIN share the same payment destination.
- Individual NPIs do not require separate banking information.

A TIN Enrollment allows one active bank account to be associated with the entire TIN.

NPI Enrollment

Choose **NPI Enrollment** when different providers or practice locations require payments to be deposited into different bank accounts.

This option is commonly used when:

- Multiple offices operate under the same TIN.
- Individual providers require separate payment accounts.
- Different NPIs should receive payments to different bank accounts.

Each NPI may only be associated with one active bank account at a time.

Step 1 – Select Enrollment Type

After logging into EnrollSafe:

1. Select **Enroll Now**.
2. Verify that the displayed Tax Identification Number (TIN) matches the organization you intend to enroll.
3. Select either **TIN Enrollment** or **NPI Enrollment**.
4. Select **Continue**.

If you selected **NPI Enrollment**, add each NPI that should be included in the enrollment before continuing.

If an NPI cannot be located, contact the participating Health Plan and request that the NPI be synchronized with EnrollSafe before continuing the enrollment process.

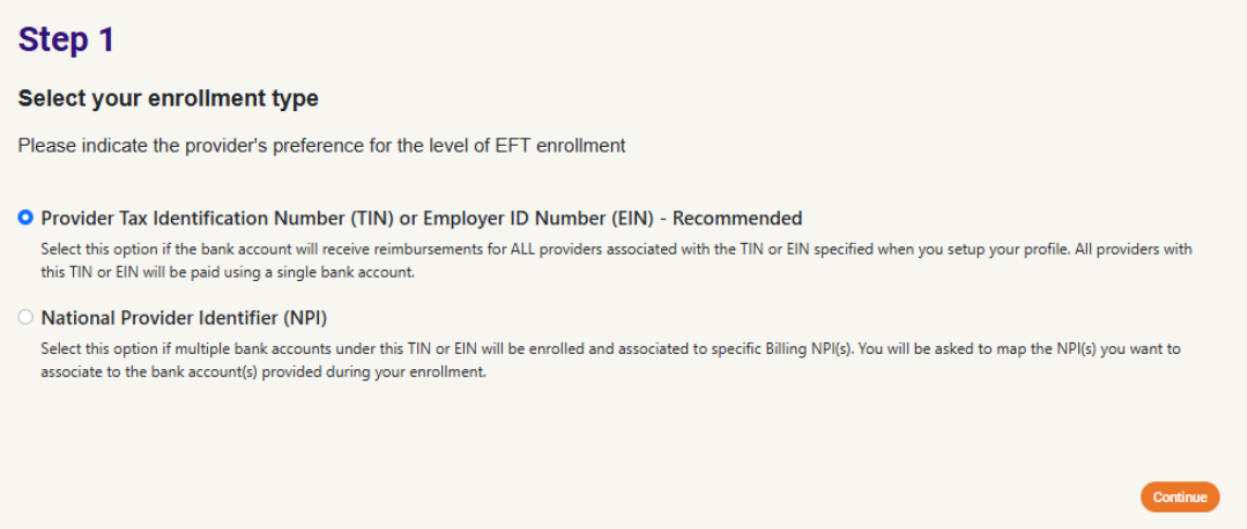


Figure 4-1. Select Enrollment Type.

Step 2 – Review Provider Information

Review the provider information imported from your registration.

Verify the accuracy of:

- Provider name
- Provider Contact
- Address
- Tax Identification Number (TIN)
- National Provider Identifier (NPI), if applicable

If any information is incorrect, discontinue the enrollment and contact PayeeHub Support before proceeding.

Select **Continue** once the information has been verified.

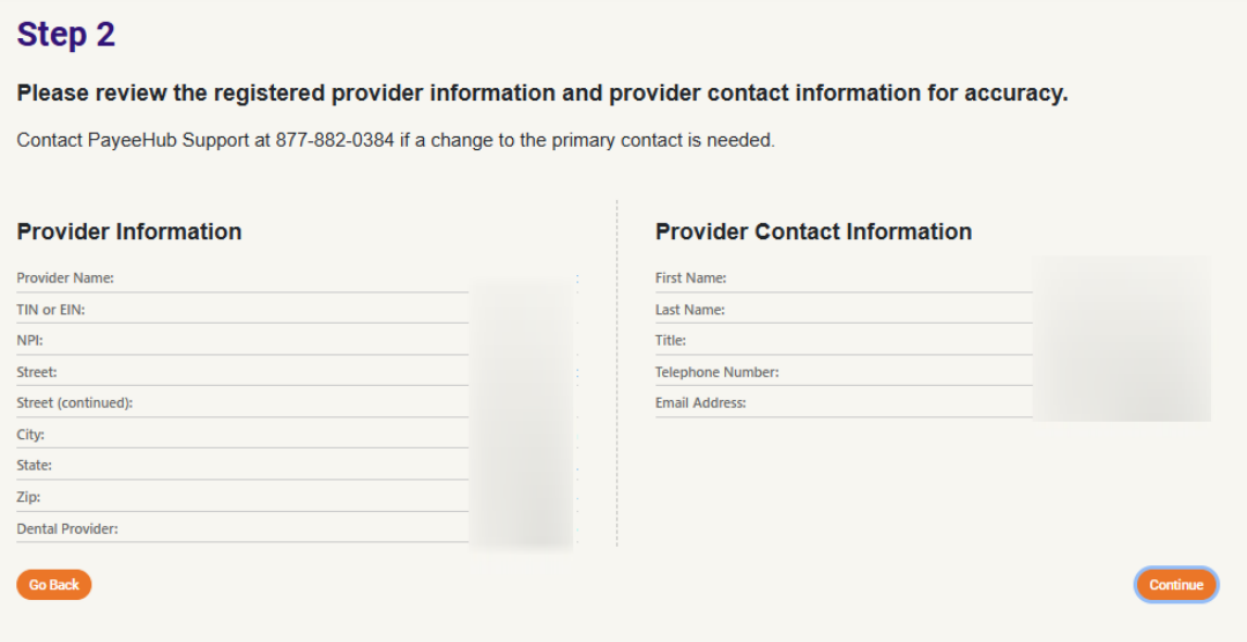


Figure 4-2. Review Provider Information.

Step 3 – Add Banking Information

Select **Add Bank Account** to begin entering your EFT banking information.
For each bank account, provide:

- Financial institution name
- Routing number
- Account number
- Account type
- Bank verification document

The bank verification document must correspond to the banking information being submitted.

Supported document requirements are described in **Appendix A – Accepted Documentation**.

TIN Enrollment

For a TIN Enrollment, enter the banking information for the account that should receive EFT payments for the entire Tax Identification Number.

Review the information carefully before continuing.

If corrections are required before submission, use the available **Edit** or **Remove** options.

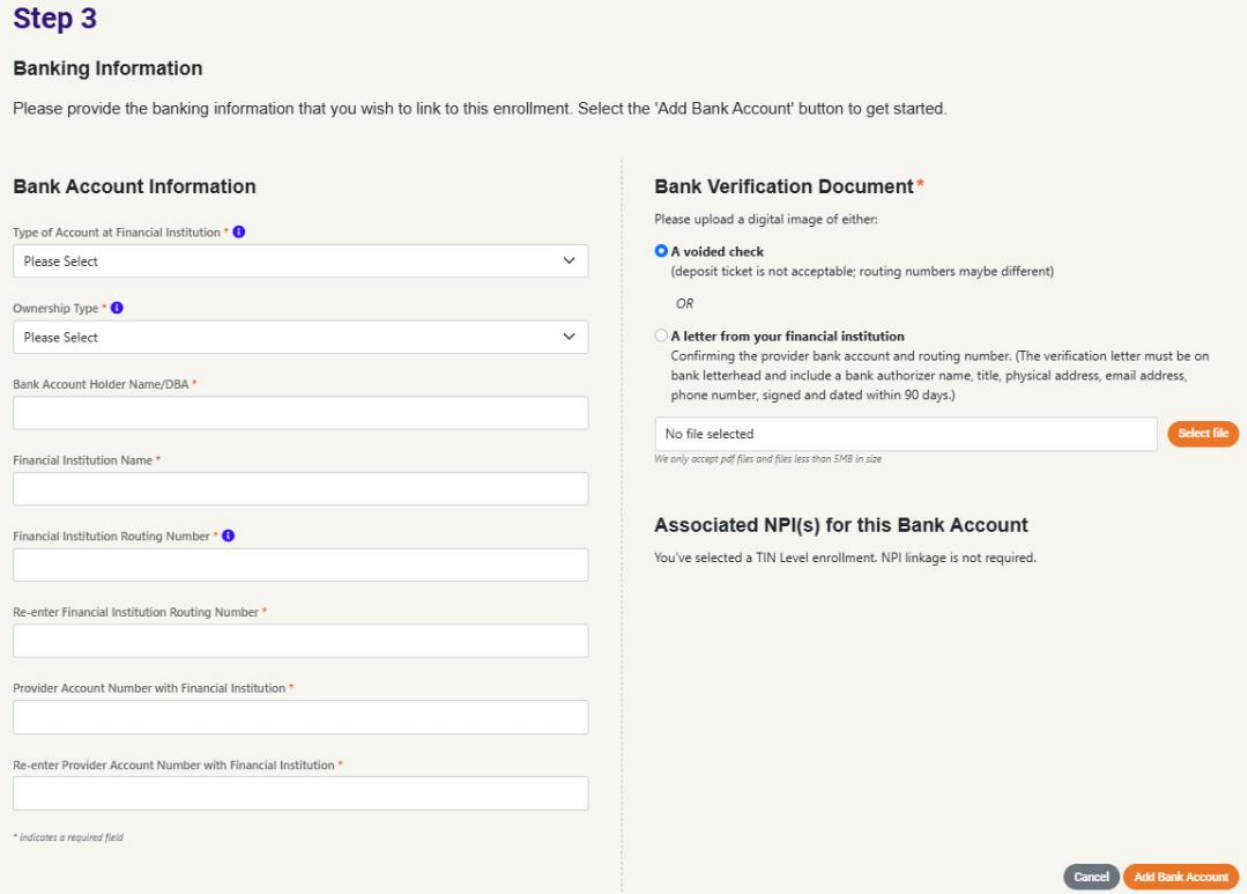


Figure 4-3. Add TIN-Level Bank Account.

NPI Enrollment

For an NPI Enrollment, associate one or more NPIs with each bank account entered. After adding the bank account information:

1. Select the NPIs that should be associated with the bank account.
2. Move the selected NPIs into the associated list.
3. Repeat the process for any additional bank accounts until every desired NPI has been assigned.

Before continuing, verify that every NPI has been associated with the appropriate bank account.

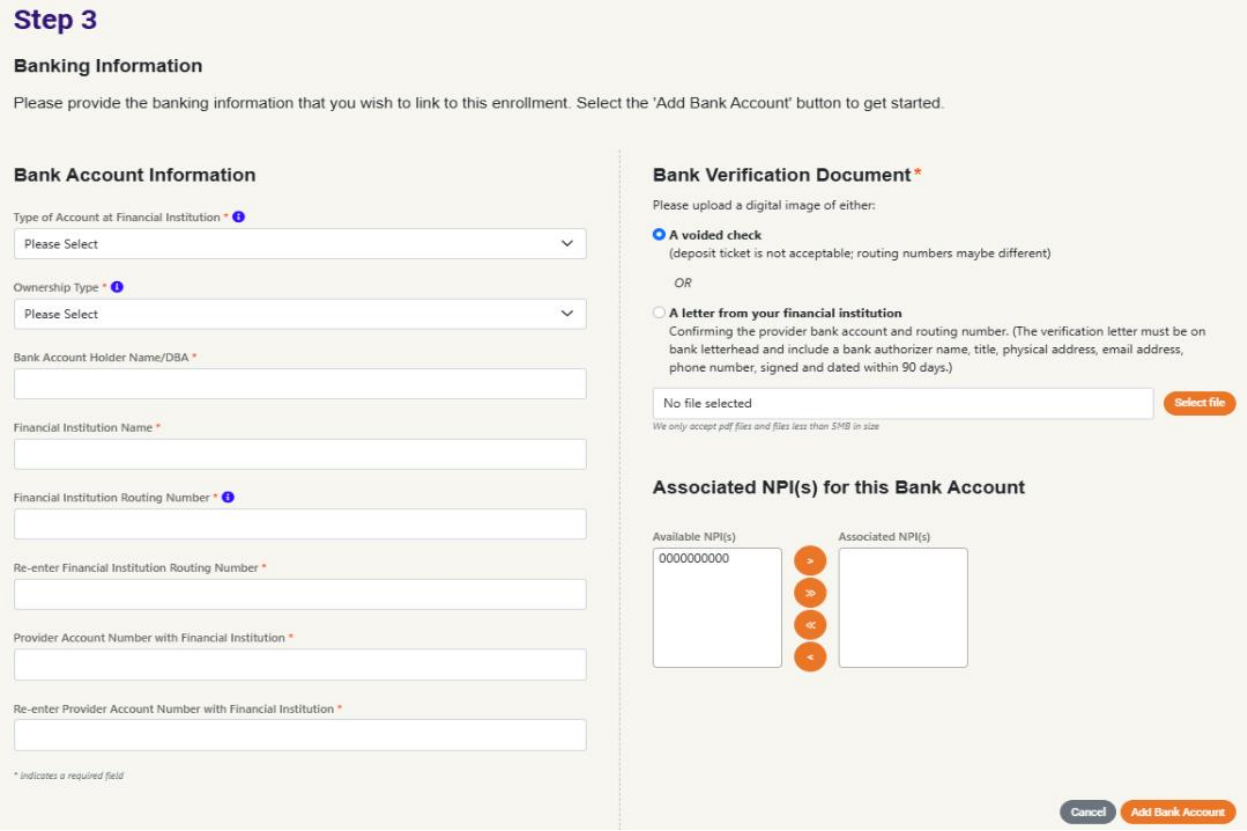


Figure 4-4. Add NPI-Level Bank Account.

Step 4 – Review and Submit

Review the enrollment type, provider information, banking information, and associated NPIs, if applicable.

Read the Terms of Service, enter your name and title, select the agreement checkbox, and then select **Submit**.

Important

Before submitting your enrollment, verify that all required TIN and NPI combinations have been included. Any combination omitted from the enrollment will continue to receive payment using the participating Health Plan's alternate payment method.

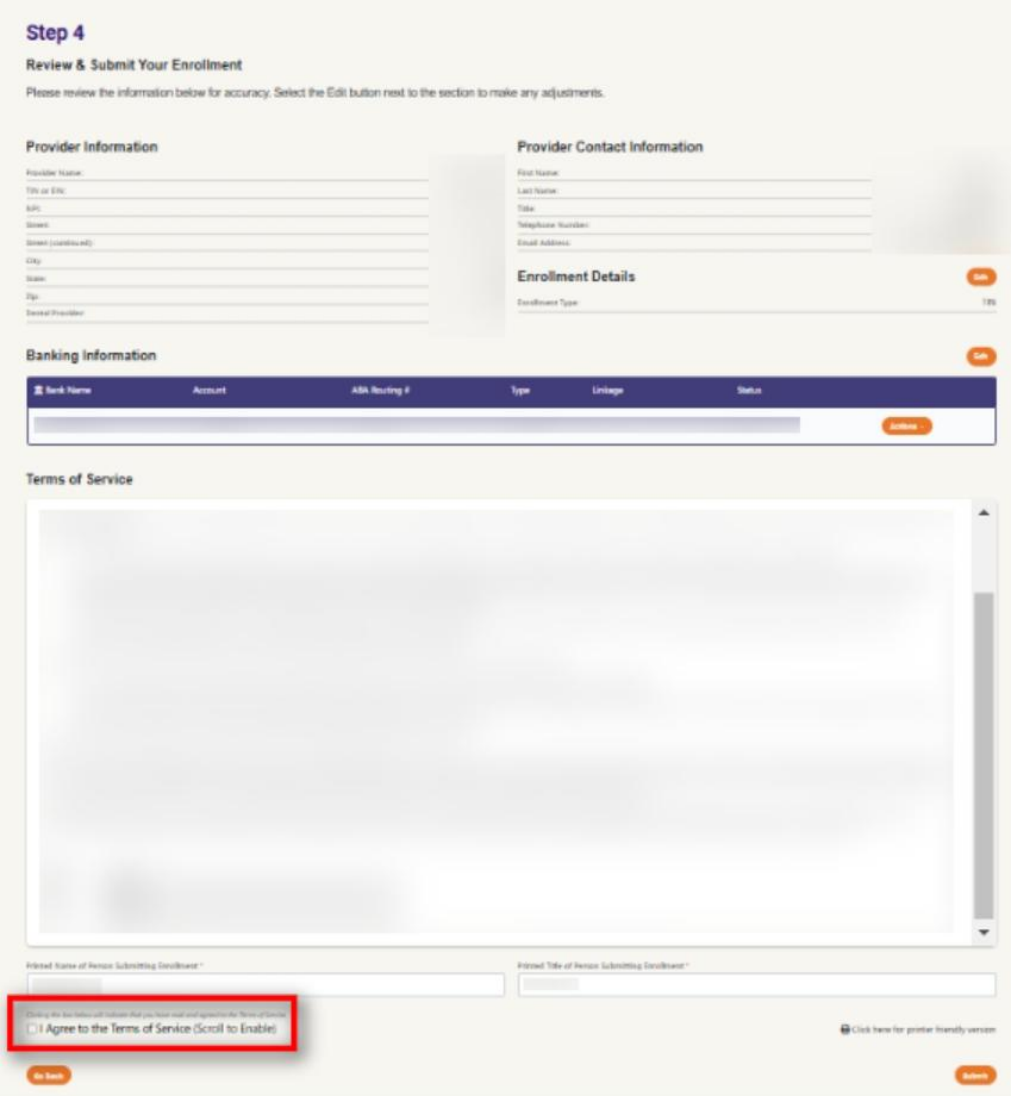


Figure 4-5. Review and Submit Enrollment.

Verification Process

After the enrollment has been submitted, it enters the review and verification process. Depending on the participating Health Plan, verification may include:

- Review of submitted documentation.
- Validation of banking information.
- Telephone verification with the authorized Provider Contact.
- Additional requests for information if needed.

If additional information is required, the enrollment status changes to **Action Required** until the requested information has been received.

You'll receive email notifications throughout the verification process to keep you informed of your enrollment status.

What Happens Next?

After your enrollment has been submitted:

1. The enrollment is reviewed by the participating Health Plan.
2. Supporting documentation is validated.
3. Additional verification may be completed if required.
4. Once approved, the enrollment status changes to **Active**.
5. A confirmation email is sent to the Provider Contact.

If the enrollment cannot be completed, you'll receive an email describing the issue and any required next steps.

After your enrollment becomes **Active**, you can use EnrollSafe to:

- View enrollment details.
- Replace banking information.
- Manage NPIs.
- Add additional bank accounts (NPI Enrollment).
- Report suspicious activity.
- Monitor future enrollment changes.

Next Step

Continue to **Manage Existing Enrollments** to learn how to maintain and update your enrollment after it has been approved.

Part 3 – Manage Existing Enrollments

5. Manage Existing Enrollments

Overview

After an EFT enrollment has been approved, EnrollSafe provides several tools for maintaining and updating your enrollment.

From the **Current Enrollments** page, authorized Provider Contacts can review enrollment details, replace banking information, modify enrollment types, manage NPI associations, add additional bank accounts, report suspicious activity, and cancel enrollments when appropriate.

Most enrollment maintenance begins by selecting the **Actions** menu associated with an existing enrollment.

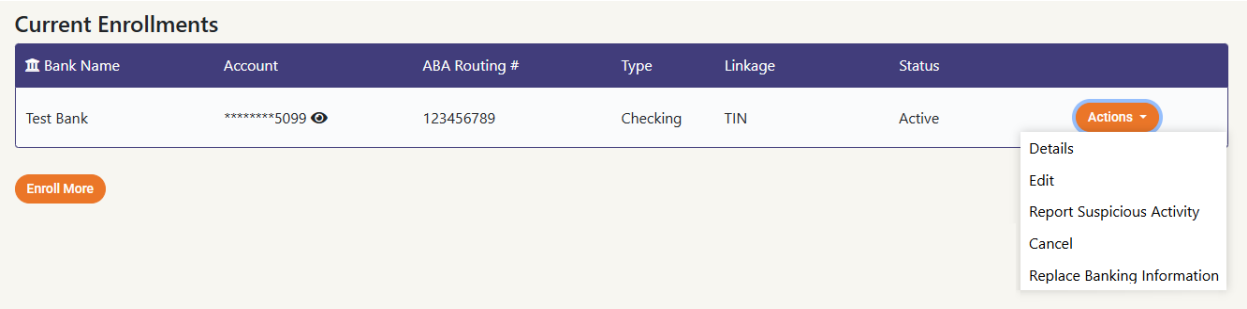


Figure 5-1. Current Enrollments page.

Managing enrollments allows you to keep your EFT information current while minimizing interruptions to payment processing.

The available actions depend on the enrollment's current status and enrollment type.

Common enrollment management activities include:

- Viewing enrollment details
- Replacing banking information
- Changing enrollment type
- Managing NPI associations
- Adding additional bank accounts
- Reporting suspicious activity
- Cancelling an enrollment

Each of these activities is described in the following sections.

6. View Enrollment Details

Overview

The **View Enrollment Details** page provides a summary of the information currently associated with an enrollment.

Reviewing enrollment details is recommended before requesting any enrollment changes to confirm that the correct enrollment is being modified.

View Enrollment Details

To review an existing enrollment:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the enrollment you want to review.
4. Select **Actions**.
5. Select **Details**.

The enrollment details display information such as:

- Enrollment status
- Enrollment type
- Financial institution
- Bank account information (masked)
- Associated NPIs
- Effective status
- Submitted documentation

Review the displayed information carefully before initiating any enrollment changes.

7. Replace Banking Information

Overview

Use **Replace Banking Information** to update the bank account associated with an existing Active enrollment.

This feature allows you to submit new banking information while your current enrollment remains available for payment processing during the verification process.

Once the replacement enrollment has been approved, the new bank account becomes Active and the previous enrollment is automatically cancelled.

This process helps minimize interruptions to EFT payments while your updated banking information is being verified.

When to Use

Use **Replace Banking Information** when:

- Your financial institution has changed.
- Your routing number has changed.
- Your account number has changed.
- Your organization is moving EFT payments to a different bank account.

Do not use this feature when:

- Adding or removing NPIs from an existing enrollment.
- Changing between TIN and NPI enrollment types.
- Reporting suspicious activity.
- Cancelling an enrollment that is no longer needed.

Each of these actions has its own workflow within EnrollSafe.

Before You Begin

Before replacing your banking information, ensure you have:

- The new routing number.
- The new account number.
- A Bank Verification Document in PDF format.
- Authorization to make payment-related changes for the provider organization.

If you intend to continue receiving EFT payments to your current bank account during verification, no additional action is required before beginning the replacement process.

Payment Preference Options

After selecting **Replace Banking Information**, you'll be asked how payments should be handled while the replacement enrollment is being verified.

Choose the option that best meets your organization's needs.

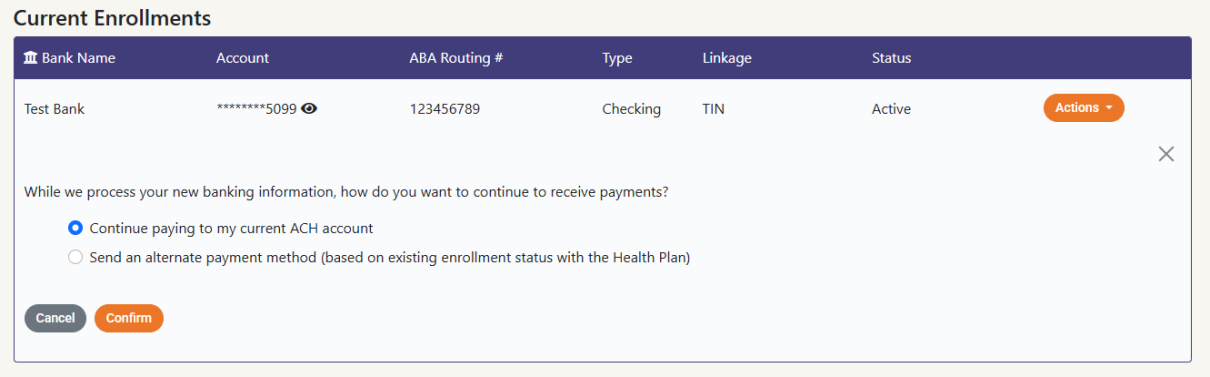


Figure 7-1. Payment Preference Options

Continue Current ACH Payments

Select **Continue paying to my current ACH account** if you want EFT payments to continue being deposited into your existing bank account while the replacement enrollment is being reviewed.

This is the recommended option for most providers because it minimizes disruption to payment processing.

After approval, the replacement enrollment becomes **Active**, the previous enrollment is automatically **Cancelled**, and no additional action is required.

Alternate Payment Method

Select **Send an alternate payment method (based on existing enrollment status with the Health Plan)** if you do not want payments deposited into the current bank account during the verification process.

While the replacement enrollment is under review, payments will follow the participating Health Plan's alternate payment process.

After the replacement enrollment has been approved, EFT payments resume using the newly approved bank account.

Submit Replacement Banking Information

After selecting your payment preference:

1. Enter the new banking information.
2. Upload the required Bank Verification Document.
3. Review the information for accuracy.
4. Electronically sign the request.
5. Select **Submit**.

Review all information carefully before submitting the replacement request.

The routing number, account number, and supporting documentation should all correspond to the same bank account.

Verification Process

After submission, the replacement enrollment enters the standard review process. During verification, the participating Health Plan may:

- Validate the submitted banking information.
- Review the supporting documentation.
- Request additional information if needed.
- Contact the authorized Provider Contact for verification.

If additional information is required, the enrollment status changes to **Action Required** until the requested information has been provided.

You'll receive email notifications as the enrollment progresses through the review process.

What Happens Next?

If you selected **Continue paying to my current ACH account**, your current enrollment remains Active while the replacement enrollment is reviewed.

Once the replacement enrollment has been approved:

- The replacement enrollment becomes **Active**.
- The previous enrollment is automatically **Cancelled**.
- Future EFT payments are directed to the new bank account.

If you selected the alternate payment option, payments will follow the participating Health Plan's alternate payment process until the replacement enrollment becomes Active.

A confirmation email is sent once the enrollment change has been completed.

Important Considerations

- When replacing banking information, verify that all applicable TIN and NPI associations remain accurate. Omitting required associations may result in payments being issued through the participating Health Plan's alternate payment method.
- Replacing banking information does not require cancelling your current enrollment before submitting the replacement request.
- Only one enrollment is Active after the replacement has been completed.
- Replacement requests are subject to review and approval by the participating Health Plan.
- If the replacement enrollment cannot be approved, you'll receive notification describing the issue and any required next steps.
- Ensure the Bank Verification Document matches the routing and account numbers entered during the replacement process to help avoid processing delays.

8. Change Enrollment Type

Overview

EnrollSafe allows you to change an existing enrollment between **TIN-Level** and **NPI-Level** enrollment without creating a new provider account.

Changing the enrollment type updates how EFT payments are associated with your organization while preserving the provider's existing EnrollSafe account.

This feature is typically used when an organization's payment requirements change over time.

TIN to NPI

Use this option when your organization currently has a TIN-Level enrollment but needs to direct payments for individual NPIs to different bank accounts.

To change from a TIN-Level enrollment to an NPI-Level enrollment:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the TIN-Level enrollment.
4. Select **Actions**.
5. Select **Edit**.
6. Choose the option to change to an **NPI-Level Enrollment**.
7. Add each NPI that should be associated with the enrollment.
8. Associate the appropriate NPIs with the bank account.
9. Review the information and select **Submit**.

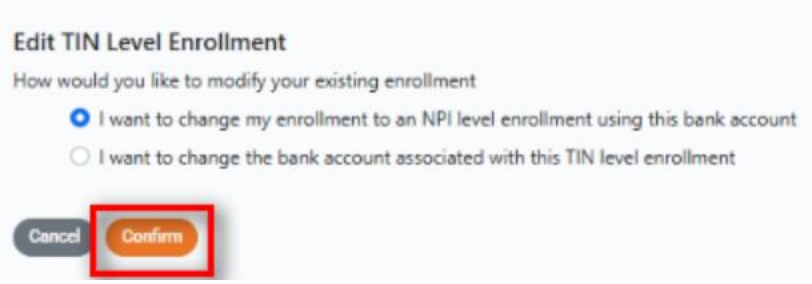


Figure 8-1. Change from TIN-Level to NPI-Level Enrollment

NPI to TIN

Use this option when all EFT payments associated with the Tax Identification Number (TIN) should be directed to a single bank account.

To change from an NPI-Level enrollment to a TIN-Level enrollment:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the NPI-Level enrollment.
4. Select **Actions**.
5. Select **Edit**.
6. Choose the option to convert the enrollment to **TIN-Level**.
7. Review the confirmation message describing the impact of the change.
8. Select **Submit**.

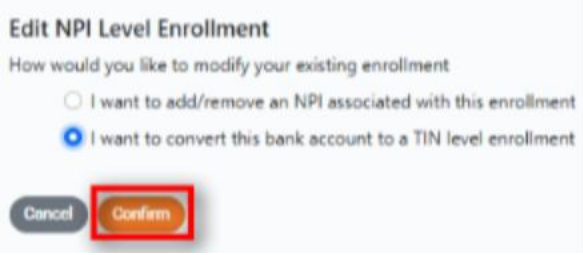


Figure 8-2. Change from NPI-Level to TIN-Level Enrollment

What Happens Next?

After the enrollment change request has been submitted:

- The request enters the review process.
- The enrollment status changes to **Change Enrollment Request Pending**.
- The participating Health Plan reviews the requested change.
- Once approved, the new enrollment type becomes **Active**.
- The previous enrollment type is automatically **Cancelled**.

A confirmation email is sent to the Provider Contact after the enrollment change has been completed.

If additional information is required during review, the enrollment status changes to **Action Required**, and you'll receive instructions describing the required next steps.

9. Manage NPI Associations

Overview

For NPI-Level enrollments, EnrollSafe allows you to update which National Provider Identifiers (NPIs) are associated with an existing bank account.

Use this feature when providers are added to or removed from an existing enrollment and no banking changes are required.

Updating NPI associations allows your organization to maintain accurate payment routing while keeping existing banking information unchanged.

Add NPIs

Use this option when additional providers should receive EFT payments through an existing bank account.

To add NPIs to an enrollment:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the applicable NPI-Level enrollment.
4. Select **Actions**.
5. Select **Edit**.
6. Choose the option to add or remove NPIs.
7. Enter the NPI to be added.
8. Select **Add NPI**.
9. Move the NPI from the **Available NPIs** list to the **Associated NPIs** list.
10. Review the updated list of associated NPIs.
11. Select **Submit**.

Repeat this process until all required NPIs have been associated with the enrollment.

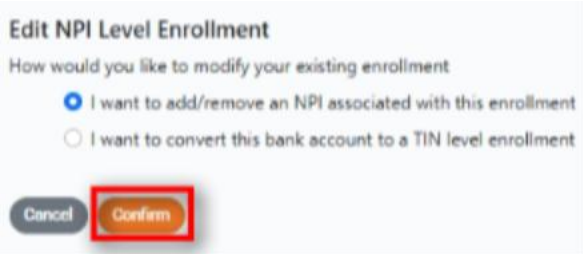


Figure 9-1. Add NPIs to an Enrollment

Remove NPIs

Use this option when an existing provider should no longer receive EFT payments through the selected bank account.

To remove an NPI:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Select **Actions**.
4. Select **Edit**.
5. Choose the option to add or remove NPIs.
6. Select the NPI to be removed.
7. Move the NPI from the **Associated NPIs** list back to the **Available NPIs** list.
8. Review the updated list.
9. Select **Submit**.

Removing an NPI from an enrollment does not remove the provider from EnrollSafe. It only removes the association between that NPI and the selected bank account.

What Happens Next?

After submitting the requested changes:

- The enrollment status changes to **Change Enrollment Request Pending**.
- The updated NPI roster is submitted to the participating Health Plan for review.
- Once approved, the updated NPI associations become Active.
- A confirmation email is sent to the Provider Contact.

If additional information is required during review, the enrollment status changes to **Action Required** until the requested information has been provided.

If no further changes are needed, the enrollment continues processing EFT payments using the existing bank account and the updated NPI associations.

10. Add Additional Bank Accounts

Overview

Providers enrolled at the NPI level may associate multiple bank accounts with a single Tax Identification Number (TIN).
This feature allows different NPIs to receive EFT payments through different bank accounts while maintaining a single EnrollSafe account.
Each NPI may only be associated with one active bank account at a time.

Add Additional Account

Use this option when additional providers or practice locations require payments to be deposited into a different bank account.

To add another bank account:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Select **Enroll More**.
4. Verify that **NPI Enrollment** is selected.
5. Enter the banking information for the additional account.
6. Upload the required Bank Verification Document.
7. Associate the appropriate NPIs with the new bank account.
8. Review the information.
9. Select **Submit**.

Before submitting the request, verify that:

- Every NPI is associated with the correct bank account.
- No NPI has been assigned to multiple active bank accounts.
- The uploaded Bank Verification Document matches the banking information entered.

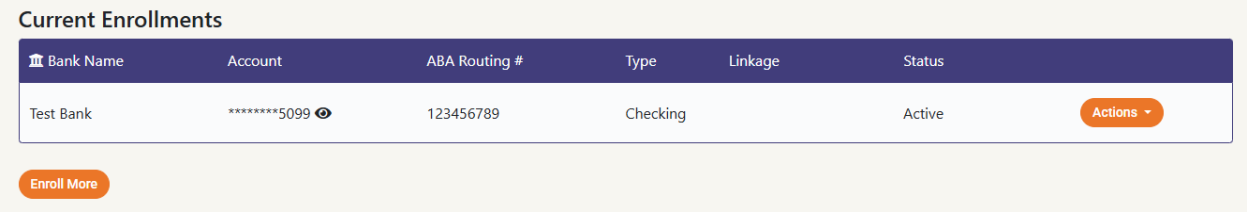


Figure 10-1. Add Additional Bank Account

What Happens Next?

After the request has been submitted:

- The additional bank account enters the review process.
- The enrollment status reflects that the request is pending review.
- The participating Health Plan validates the banking information and associated NPIs.
- Once approved, the newly associated NPIs begin receiving EFT payments through the newly approved bank account.

The existing bank accounts associated with other NPIs remain unchanged.

If additional information is required during review, the enrollment status changes to **Action Required**, and you'll receive instructions describing the information needed to continue processing.

11. Cancel an Enrollment

Overview

The **Cancel Enrollment** option permanently ends an existing enrollment.
Cancellation should only be used when the enrollment is no longer required or when directed by PayeeHub Support.
If you are updating banking information, use **Replace Banking Information** instead of cancelling the enrollment.

When to Cancel

Examples of situations where cancellation may be appropriate include:

- The provider is no longer using the enrolled bank account.
- An enrollment was submitted in error.
- The provider organization is no longer participating.
- PayeeHub Support has instructed you to cancel the enrollment.

Cancelling an enrollment may affect future EFT payments.

If you are unsure whether cancellation is appropriate, contact PayeeHub Support before proceeding.

Cancel Enrollment

To cancel an enrollment:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the enrollment you want to cancel.
4. Select **Actions**.
5. Select **Cancel**.
6. Select the appropriate cancellation reason.
7. Review the request.
8. Confirm the cancellation.

After the cancellation request has been submitted, the enrollment enters the cancellation process.

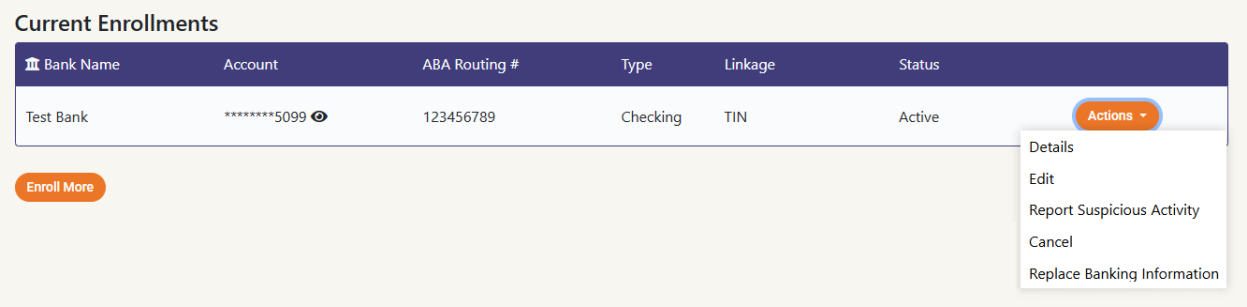


Figure 11-1. Cancel Enrollment

What Happens Next?

After the cancellation request has been submitted:

- The participating Health Plan processes the cancellation request.
- The enrollment status changes to **Cancelled** once processing has completed.
- A confirmation email is sent to the Provider Contact.

If EFT payments are still required after cancellation, a new enrollment must be submitted.

12. Report Suspicious Activity

Overview

If you believe the banking information associated with an enrollment has been compromised or used fraudulently, report the activity immediately using the **Report Suspicious Activity** feature.

Submitting a report alerts PayeeHub so that the participating Health Plan can prioritize review of the affected enrollment.

This feature should only be used when fraudulent or suspicious banking activity is suspected.

Report Suspicious Activity

To report suspicious activity:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the affected enrollment.
4. Select **Actions**.
5. Select **Report Suspicious Activity**.
6. Review the confirmation message.
7. Select **OK** to submit the report.

Submitting a report does not immediately cancel the enrollment.

Additional verification may be required before changes are made.

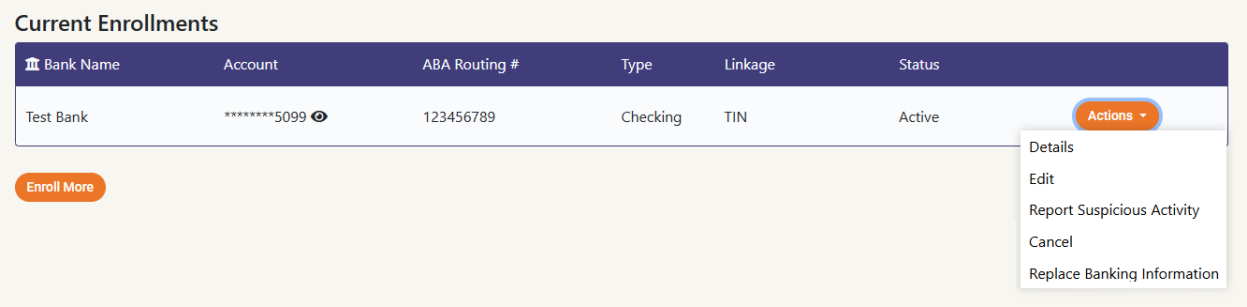


Figure 12-1. Report Suspicious Activity

What Happens Next?

After the report has been submitted:

- PayeeHub reviews the reported activity.
- The authorized Provider Contact may be contacted to verify the request.
- The participating Health Plan is notified of the reported suspicious activity.
- Appropriate fraud response procedures are initiated.

A confirmation email is sent to the Provider Contact after the report has been successfully submitted.

If banking information also needs to be updated, complete the **Replace Banking Information** process after receiving guidance from PayeeHub or the participating Health Plan.

Part 4 – Resolve Issues

13. Resolve Action Required

Overview

If additional information is required before an enrollment can continue processing, the enrollment status changes to **Action Required**.

When this occurs, the Provider Contact receives an email describing the issue and the action needed to continue processing.

Promptly responding to Action Required requests helps minimize delays in enrollment approval.

Update Bank Verification Documents

One of the most common reasons an enrollment enters **Action Required** is the need for an updated Bank Verification Document.

To upload a replacement document:

1. Log in to EnrollSafe.
2. Navigate to the **Current Enrollments** page.
3. Locate the enrollment displaying **Action Required**.
4. Select the **Action Required** link associated with the enrollment.
5. Select the appropriate Bank Verification Document type.
6. Upload the updated PDF document.
7. Review the selected document.
8. Select **Submit**.

Ensure the uploaded document matches the routing number and account number associated with the enrollment.

Providing incorrect or incomplete documentation may result in additional processing delays.

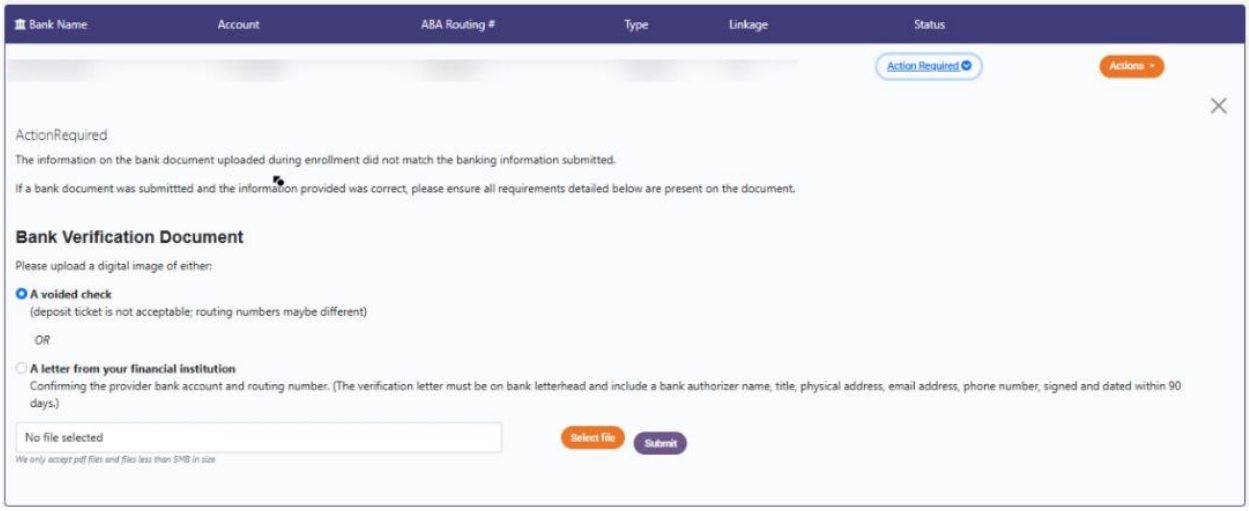


Figure 13-1. Update Bank Verification Document

Resolve a Declined Enrollment

Occasionally, an enrollment that was previously Active may later be declined by the participating Health Plan.

When this occurs, the Provider Contact receives an email describing the reason for the decline and any actions required.

Common reasons include:

- Banking information could not be validated.
- The financial institution rejected the account.
- The account has been closed.
- Payment verification was unsuccessful.

Review the email carefully before taking further action.

If the banking information must be corrected, submit updated banking information using **Replace Banking Information**.

If the issue is related to the financial institution, contact your bank before submitting another enrollment request.

If you're uncertain how to proceed, contact PayeeHub Support for assistance.

What Happens Next?

After the requested information has been submitted:

- The enrollment returns to the review process.
- The participating Health Plan validates the updated information.
- If no additional issues are identified, the enrollment continues toward approval.
- The enrollment status is updated as processing progresses.

If further information is required, the enrollment may remain in **Action Required** until all requested documentation has been received.

You'll receive email notifications whenever the enrollment status changes.

14. Common Technical Issues

Browser Requirements

EnrollSafe is designed for use on a desktop or laptop computer.

For the best experience:

- Use the most recent version of **Google Chrome**.
- Enable JavaScript.
- Allow pop-up windows for the EnrollSafe site if prompted.
- Use a stable internet connection.

Mobile devices and tablets are not supported.

Password Reset

If you're unable to reset your password:

1. Verify that the password reset email has not been filtered into your Junk or Spam folder.
2. Confirm that your organization's email security settings allow messages from **help@payeehub.org**.
3. Open the password reset link directly from the email.
4. If the link has expired, request another password reset from the EnrollSafe login page.

If you're still unable to access your account, contact PayeeHub Support.

Upload Problems

If you're unable to upload a document:

Verify that:

- The document is saved as a PDF.
- The file size meets EnrollSafe requirements.
- The document is stored locally on your computer.
- The file is not currently open in another application.

If the upload continues to fail:

- Refresh the browser.
- Sign in again.
- Repeat the upload.

Email Delivery Issues

If you're not receiving emails from EnrollSafe:

- Check your Junk or Spam folder.
- Add **help@payeehub.org** and **no-reply@payeehub.org** to your organization's trusted senders list.
- Confirm that your email address is correct.
- Contact your organization's IT department if email filtering policies may be preventing delivery.

Registration emails and enrollment notifications are sent to the email address associated with the Provider Contact.

General Troubleshooting

Many common issues can be resolved by completing the following steps:

1. Close the browser.
2. Clear your browser cache and cookies.
3. Restart Google Chrome.
4. Sign in again.
5. Retry the action.

If the issue continues after completing these steps, contact PayeeHub Support and provide:

- Your Tax Identification Number (TIN)
- The enrollment involved
- A description of the issue
- Any error message displayed by the portal

This information helps Support investigate the issue more efficiently.

Part 5 – Reference

15. Frequently Asked Questions

Registration

Why can't I find my Tax Identification Number (TIN)?

If your TIN cannot be located during registration, it may not yet be synchronized with EnrollSafe.

Contact the participating Health Plan and request that your provider information be synchronized before attempting registration again.

My TIN is already registered. What should I do?

Only one authorized Provider Contact may be associated with each Tax Identification Number (TIN).

If your organization has already registered, determine who currently manages the account before contacting PayeeHub Support.

Do I need an NPI to register?

If your organization has one or more National Provider Identifiers (NPIs), include them during registration whenever possible.

Providers without an NPI may continue registration if applicable.

How long does registration take?

Registration requests are reviewed after submission.

Processing times may vary depending on the participating Health Plan and whether additional information is required.

Enrollment

What's the difference between Registration and Enrollment?

Registration creates your EnrollSafe account and login credentials.

Enrollment establishes the banking information used for Electronic Funds Transfer (EFT).

Registration must be completed before an enrollment can be submitted.

Which enrollment type should I choose?

Choose **TIN Enrollment** when all providers under the Tax Identification Number (TIN) will receive payments through one bank account.

Choose **NPI Enrollment** when different providers or practice locations require separate bank accounts.

Can I have multiple bank accounts?

Yes.

Organizations using **NPI Enrollment** may associate multiple bank accounts with different NPIs.

Each NPI may only be associated with one active bank account at a time.

Banking Information

How do I update my banking information?

Use **Replace Banking Information** from the **Actions** menu associated with the Active enrollment.

Your current enrollment can remain Active while the replacement enrollment is reviewed.

After approval:

- The replacement enrollment becomes Active.
- The previous enrollment is automatically Cancelled.

Do I need to cancel my enrollment before replacing banking information?

No.

Replacing banking information does not require cancelling the existing enrollment.

This helps minimize interruptions to EFT payments during the verification process.

What documents can I upload?

Accepted documentation includes:

- Current IRS W-9 (Registration)
- Bank Verification Letter
- Voided Check

Additional document requirements are available in **Appendix A – Accepted Documentation**.

Technical Support

Which browser should I use?

Google Chrome is the recommended browser for accessing EnrollSafe.

Desktop and laptop computers provide the best experience.

I forgot my password.

Use the password reset link on the EnrollSafe login page.

If you're unable to reset your password, refer to **Common Technical Issues** or contact PayeeHub Support.

I'm not receiving emails from EnrollSafe.

Verify that:

- Your email address is correct.
- Messages from **help@payeehub.org** and **no-reply@payeehub.org** are not being filtered.
- Your Junk or Spam folder has been checked.

If the issue continues, contact your organization's IT department or PayeeHub Support.

Claims & Payments

When will I begin receiving EFT payments?

Once your enrollment has been approved and becomes **Active**, participating Health Plans begin processing payments according to their own implementation schedules.

Who should I contact with questions about claims or payment amounts?

Questions regarding:

- Claims
- Payment amounts
- Remittance Advice (ERA/EOB)
- Provider network participation

should be directed to the participating Health Plan.

PayeeHub Support assists with enrollment-related questions only.

16. Contact Support

PayeeHub Support

Contact PayeeHub Support if you need assistance with:

- Registration
- Login credentials
- EFT enrollment
- Banking information
- Enrollment status
- Technical issues

Phone

(877) 882-0384

Hours

Monday – Friday

9:00 AM – 8:00 PM EST

Claims & Payment Questions

For questions regarding claims, payment status, remittance advice, or payment amounts, contact the participating Health Plan directly.

PayeeHub does not determine claim payment amounts or adjudication decisions.

Before contacting Support, have the following information available whenever possible:

- Provider Name
- Tax Identification Number (TIN)
- Enrollment Status
- National Provider Identifier (NPI), if applicable
- Description of the issue
- Any error messages displayed within EnrollSafe

Providing this information helps reduce resolution time.

Appendix A – Accepted Documentation

Registration Documents

During registration, a current IRS W-9 is required to verify the provider organization.

The W-9 should:

- Reflect the Tax Identification Number (TIN) being registered.
- Be the current IRS version.
- Be complete and legible.
- Include all required signatures.
- Be uploaded in PDF format.

Providing an incomplete or outdated W-9 may delay registration processing.

Bank Verification Documents

A Bank Verification Document is required whenever banking information is submitted or updated.

Accepted documentation includes:

- Bank Verification Letter
- Voided Check

The document should:

- Match the routing number entered during enrollment.
- Match the account number entered during enrollment.
- Clearly identify the financial institution.
- Be uploaded in PDF format.

Documents that do not correspond to the submitted banking information may require additional review before the enrollment can be approved.

File Requirements

For the best upload experience:

- Upload documents in PDF format.
- Ensure documents are complete and legible.
- Verify that scanned images are readable before uploading.
- Upload documents directly from your computer rather than from removable media whenever possible.

If a document cannot be uploaded successfully, refer to **Common Technical Issues** earlier in this guide.

Appendix B – Enrollment Status Reference

Status	Description
Pending	The enrollment has been submitted and is awaiting review.
Action Required	Additional information is required before processing can continue.
Change Enrollment Request Pending	An enrollment modification has been submitted and is awaiting review.
Active	The enrollment has been approved and is available for EFT payment processing.
Cancelled	The enrollment is no longer active.
Declined	The enrollment could not be approved or has subsequently been rejected.

Enrollment statuses are updated throughout the review process.

Providers receive email notifications whenever an enrollment requires additional action or reaches a significant processing milestone.

Appendix C – Common Tasks

The table below provides a quick reference for the most common activities performed within EnrollSafe.

If you want to...	See...
Register for portal access	Register for Portal Access
Create login credentials	Create Login Credentials
Submit your first EFT enrollment	Submit Your First EFT Enrollment
View enrollment details	View Enrollment Details
Replace banking information	Replace Banking Information
Change enrollment type	Change Enrollment Type
Add or remove NPIs	Manage NPI Associations
Add another bank account	Add Additional Bank Accounts
Cancel an enrollment	Cancel an Enrollment
Report suspicious activity	Report Suspicious Activity
Resolve an Action Required request	Resolve Action Required
Contact PayeeHub Support	Contact Support

Glossary

Action Required

An enrollment status indicating that additional information is needed before processing can continue.

Active

An enrollment status indicating that the enrollment has been approved and is available for EFT payment processing.

Bank Verification Document

Documentation used to verify the bank account submitted during enrollment, such as a Bank Verification Letter or Voided Check.

Electronic Funds Transfer (EFT)

The electronic movement of funds from a participating Health Plan to a provider's designated bank account.

EnrollSafe

The secure portal used to register providers, submit EFT enrollments, and manage existing enrollment information.

National Provider Identifier (NPI)

A unique identification number assigned to healthcare providers.

For NPI-Level enrollments, individual NPIs may be associated with different bank accounts.

Pending

An enrollment status indicating that the enrollment has been submitted and is awaiting review.

Provider Contact

The authorized individual responsible for managing enrollment activities on behalf of the provider organization.

Tax Identification Number (TIN)

The federal tax identification number associated with the provider organization.

A TIN-Level enrollment associates one bank account with the entire TIN.

TIN-Level Enrollment

An enrollment type that directs all EFT payments associated with a Tax Identification Number (TIN) to a single bank account.

NPI-Level Enrollment

An enrollment type that allows individual National Provider Identifiers (NPIs) to be associated with different bank accounts.

Replace Banking Information

An enrollment maintenance feature that allows providers to submit updated banking information while the current enrollment remains available during the verification process. Once approved, the replacement enrollment becomes Active and the previous enrollment is automatically Cancelled.