



Other Actions

On Confirmation.com you are able to complete a number of additional actions that enable you to communicate directly with responders and correct requests for future use.

Recall Requests

If you send a request in error, providing it is pending and is not being processed by the responder, you can 'recall' the request. This will remove the request from the responders queue. Requests successfully recalled generate a full credit.

To recall a request:

- 1. From Quick Links, select "Recall Confirmation".
- 2. Locate the client name and click either, the number of Pending or Future Dated requests, displayed on the far right hand column.
- 3. By default, the Actions List will display Recall.
- 4. Using the checkboxes, tick the request(s) to be recalled. If a request cannot be selected, this means it is not eligible for recall as it is being processed.
- 5. Click "submit" and click "yes" to confirm the recall of the selected request(s).

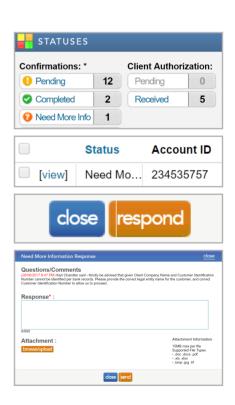
QUICK LINKS → Recall Confirmation 8 results found 8 account(s) Status Account ID Res view] Pending 112568-558... V ✓ [view] Pending 112568-998. ✓ [view] Pending 112568-889... view] MX11552 Pending Action List (selection will enable available records) ▼ submit Recall

Needs More Info

Needs More Information is a status the responder can use to ask for additional information to complete your request. You can respond to these questions within the existing request initiated to the bank. No additional fees apply for this exchange of information.

To read and respond to requests for more information:

- 1. From Statuses, select "Need More Info".
- 2. Locate the Client Name and click on the number of Need More Information requests, displayed on the far right hand column.
- 3. Click "View" on the request to which you would like to respond to.
- 4. In the Questions / Comments section of the request, read the responders comments to understand what information they require.
- 5. From the base of the request select "respond".
- 6. In the text box that appears enter your reply and, if desired, you can add an attachment to your response.
- 7. Click "send" to return your request to the responder.



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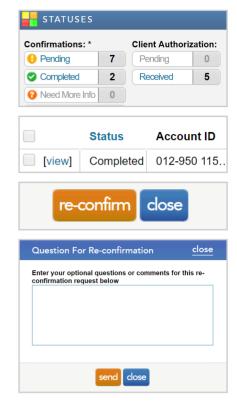
Re-Confirm

If you receive a completed request and believe the response is not complete or is incorrect, you can use the re-confirm function to return the request to the responder seeking clarification. No additional fees apply for this exchange of information.

To submit a re-confirmation:

- 1. From Statuses, select "Completed".
- 2. Locate the Client Name and click on the number of completed requests, displayed in the far right hand column.
- 3. Click "View" on the request you wish to re-confirm.
- 4. From the base of the request, select "re-confirm".
- 5. In the text box that appears enter your reply to the responder. We recommend including as much information in this section as possible.
- 6. Click "send" to return your request to the responder.

What if my confirmation is denied? If your request is denied, make sure you review the denial reason supplied by the responder, as edits to existing client and/or account information may be required. Denied requests cannot be re-confirmed and a new request must be initiated with updated information.



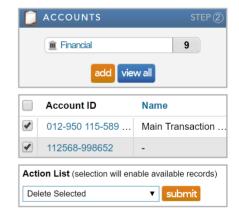


Delete Accounts

If an account needs to be removed, you are able to delete the account from the Client Profile established in Confirmation.com.

To delete an account:

- 1. From Step 2: Add Accounts, select "View All".
- 2. From the Action List, located in the bottom left-hand corner, click "Delete Selected".
- 3. Using the checkboxes, select account(s) to be deleted.
- 4. Click "submit" to delete the selected accounts.



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Edit Accounts

If a request is denied or returned as Needs More Info due to incorrect account details provided to the responder, it is strongly recommended you edit the account information to correct the request for future use.

To edit account information:

- 1. From Step 2: Add Accounts select "View All".
- 2. From the list of accounts displayed, click the Account ID you wish to edit.
- 3. Edit or confirm the Responder Information and click "next".
- 4. Edit the account information (as required) and click "save".

Important to note: If your request has been denied, you are not able to initiate a new identical request for the same account until information has been corrected.