

Higher Education ACH Enrollment Guide

Description

Finexio has launched an updated ACH Enrollment process specifically designed to support Higher Education students and faculty. This document will outline the steps that need to be taken to submit this request. If you would like to follow along in video format, please click [here](#).

Details

Navigate to finexio.com/higher-education-ach-enrollment to begin the enrollment process and review the information required to process a request. To proceed, select 'Get Started'.

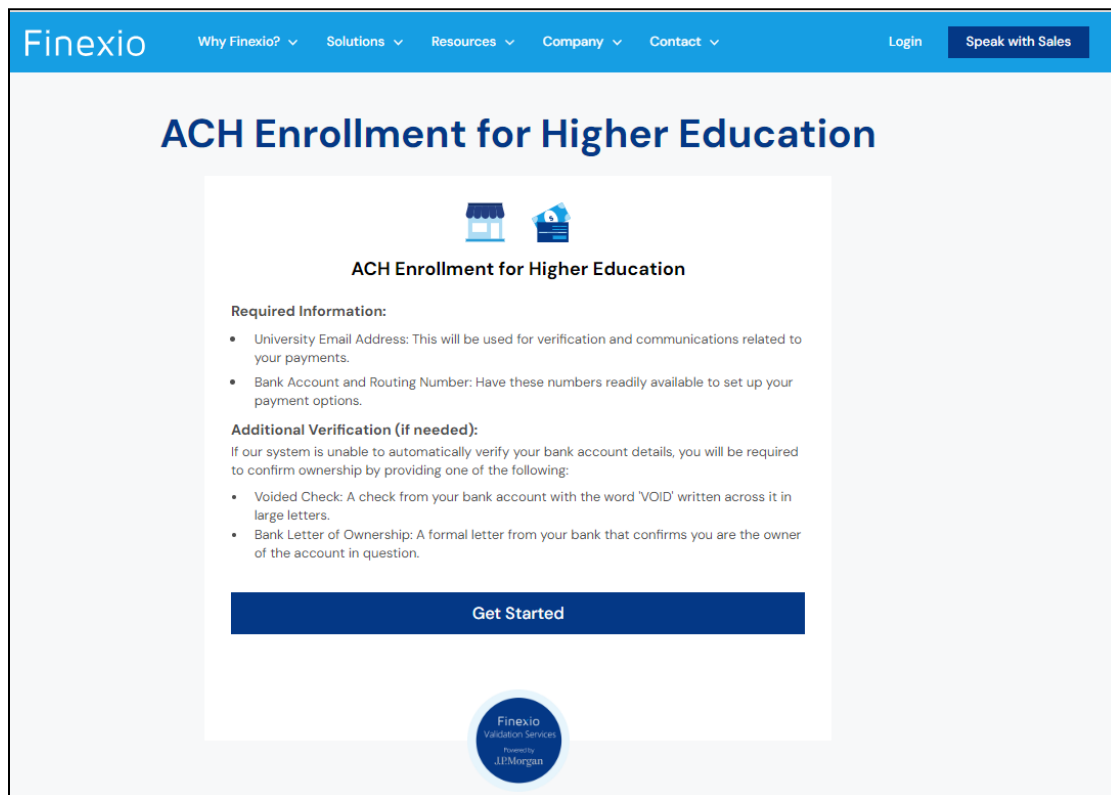


Figure 1

Finexio

Complete the next screen with your First Name, Last Name, Institution Name, Institution Email, and your Mailing Address*. Requests are **only** able to be processed with your Institution email address, which Finexio classifies as an email address ending in '.edu'. If you do not have access to this email address, please get in touch with your Institution.

***ALL students will use the address listed below. DO NOT use your personal address**

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Higher Education ACH Enrollment

First name: *

Last name: *

Mailing Address Type:

Street Line 1: *

Street Line 2:

City: *

State: *

ZIP Code: *

Institution: *

Institution Email: *

Figure 2

Finexio

When a valid email address is entered, you will see the message shown in Figure 3. The email in Figure 4 will be sent to your email address that was entered on the prior screen – this may take a few minutes to come through. Click the verification link in the body of the email message from Finexio, and a new window will open to proceed.

A verification link has been sent to your email to proceed. Be sure to check your spam folder, as well. If you cannot locate the email or need more assistance, contact support@finexio.com

Figure 3

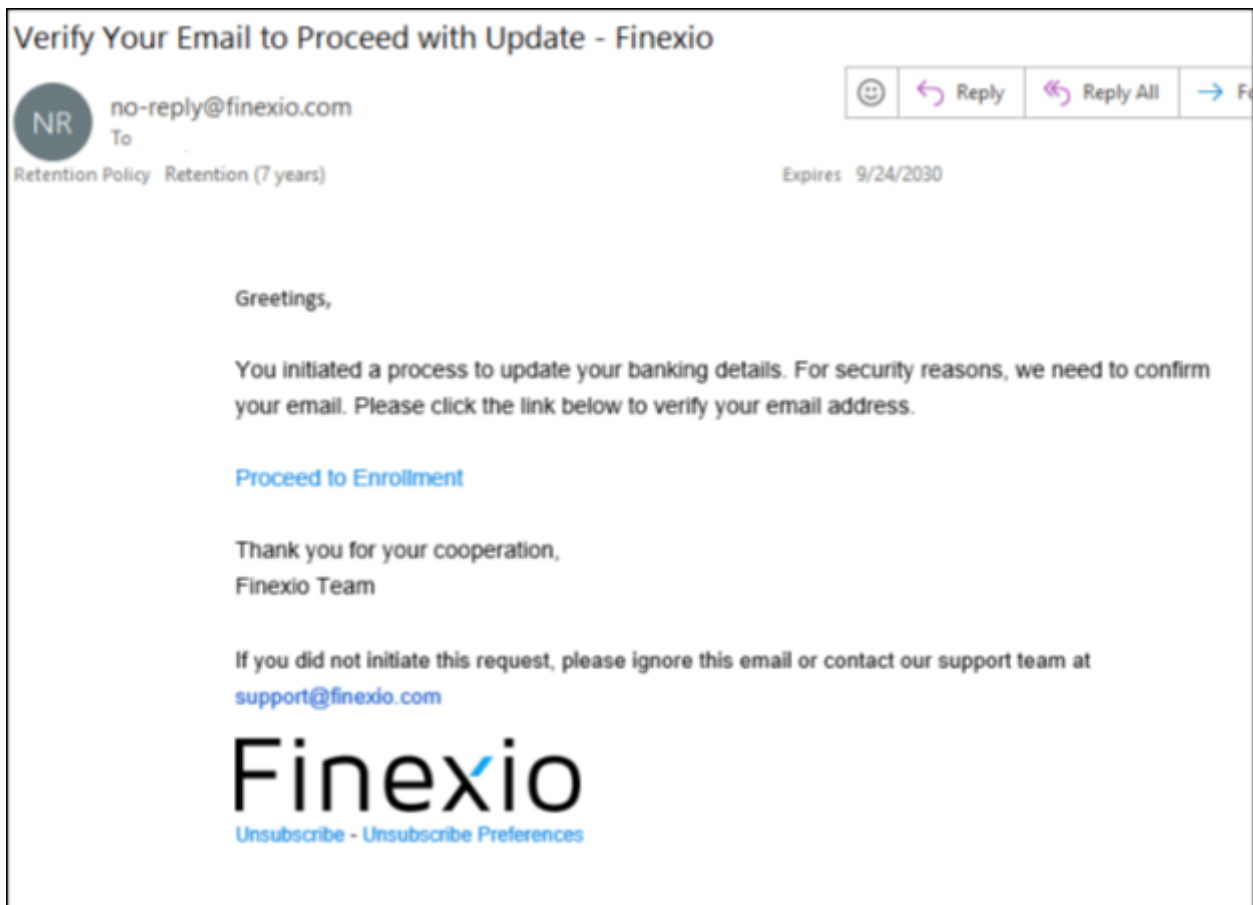


Figure 4

The new window will take you to the Account Validation Services (AVS) page. This takes the information of the bank account you are enrolling in ACH payments with (account owner name, account number, and routing number), and passes that through a service powered by JPMorgan Chase to assess the accuracy of the entered information. **Please note: the student/faculty member must be the owner of the bank account.**

Higher Education ACH Enrollment - Account Validation

Please Note: Please ensure the company or individual name you provide aligns with the one given by your bank. This step, mandated by our risk and compliance program and financial institutions, streamlines the process. Non-matching names may result in a manual review, potentially delaying your request.

New Account Number *

New Routing Number *

Bank Account Owner First Name *

Bank Account Owner Last Name *

Same as previously entered

Submit

Figure 5

Finexio

Once your bank account information is submitted, you will have an opportunity to review and confirm the information you entered. If Account Validation was successful, you can confirm your listed information and submit, as shown in Figure 6. If Account Validation was not able to confirm your account information, you will be asked to attach supporting documentation to prove account ownership, such as a voided check, bank statement, or letter on bank letterhead proving account ownership. This is shown in Figure 7. Once you have reviewed the information, you can click Submit.

Higher Education ACH Enrollment - Confirmation

First Name
Test

Last Name
Tester

Institution
XYZ University

Institution Email
test@xyzuniversity.edu

Account Number
XXXXX1234

Routing Number
123456789

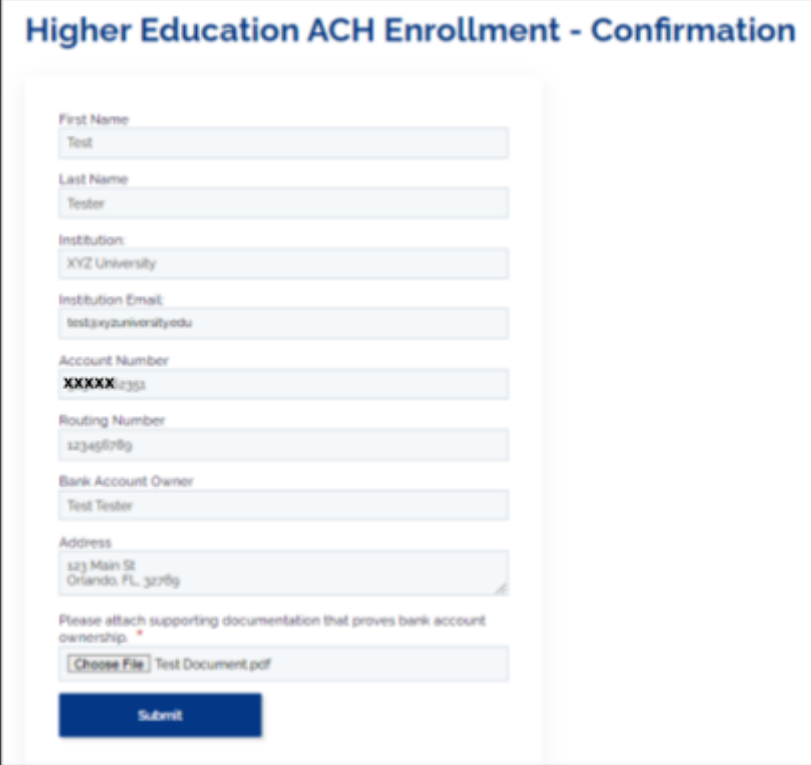
Bank Account Owner
Test Tester

Address
123 Main St
Orlando, FL, 32789

Submit

Figure 6

Finexio



The image shows a web form titled "Higher Education ACH Enrollment - Confirmation". The form contains several input fields with the following data: First Name: Test; Last Name: Tester; Institution: XYZ University; Institution Email: test@xyzuniversity.edu; Account Number: XXXXX1235; Routing Number: 123456789; Bank Account Owner: Test Tester; Address: 123 Main St, Orlando, FL, 32789. Below the address field, there is a note: "Please attach supporting documentation that proves bank account ownership." followed by a file upload field containing "Choose File" and "Test Document.pdf". A blue "Submit" button is located at the bottom of the form.

Figure 7

Once you have submitted the form, you are done! In 3–4 business days, you should hear back from our Customer Operations team, who will notify you if ACH Enrollment was successful or if more information is required to process the request.

If you have any questions about this process, please reach out to your institution or our Customer Operations team at support@finexio.com.