AUTO ACTIVATION INSTRUCTIONS

Enrolling a New Member in Credit Monitoring (w/Auto Activation)

- Once logged into your bank's enrollment portal click "Add New Member".
- Check the appropriate credit monitoring product you are enrolling the new member in.
- Complete the required fields to enroll the new member (name, address, email address, date of birth, last four of social security number), and the contact type from the drop down box.
- Click "Enroll", and if all information matches with the credit bureaus, you will receive a message that the member has been successfully enrolled (it can take up to 30 seconds for the credit bureaus to match the member's information and the "success" message to appear).
- Find the member's record. If the status of their record says "Verified", the member's information has matched with the credit bureaus and their monitoring has been activated.
- If the member record still says "Unverified", the member's information has not matched with the credit bureaus and the member will be required to activate directly through the member website as they had previously. The member will also receive an email notifying them of this and the next steps.
- If incorrect information is entered when enrolling a new member (i.e. incorrect DOB), that member can still be auto activated by opening the member record, entering the correct information in the appropriate field, and clicking the "Edit" button. The member's DOB and SS# will not be present in the record, as UBB does not keep that information. It is removed from our database when it is sent to the credit bureaus. However, you should only complete the field that needs to be corrected.
- You may enroll multiple members under one email address, however those members will be asked to enter an email address not currently being used when first logging into their account. If the member does not have access to a unique email address there are instructions from Kroll under the section titled "Setting Your New Credentials" on how to get around this requirement, so all alert emails can be sent to the same email address.

Auto Activating an Existing Member

- Click "Edit" next to the record of the member you wish to auto activate in the bank's UBB enrollment portal.
- Once in the record, enter in the member's email address, date of birth and last four of their social security number and click "Edit"
- The member's new information will be sent to the credit bureaus and upon matching, you will receive a message that member's information has been successfully updated
- Find the member's updated record and confirm the member is now "Verified"