

JOB AID

Removing a Recurring ACH in SAL

Users are able to remove a Permanent ACH in SAL upon the borrower's request.

Remove a Permanent ACH

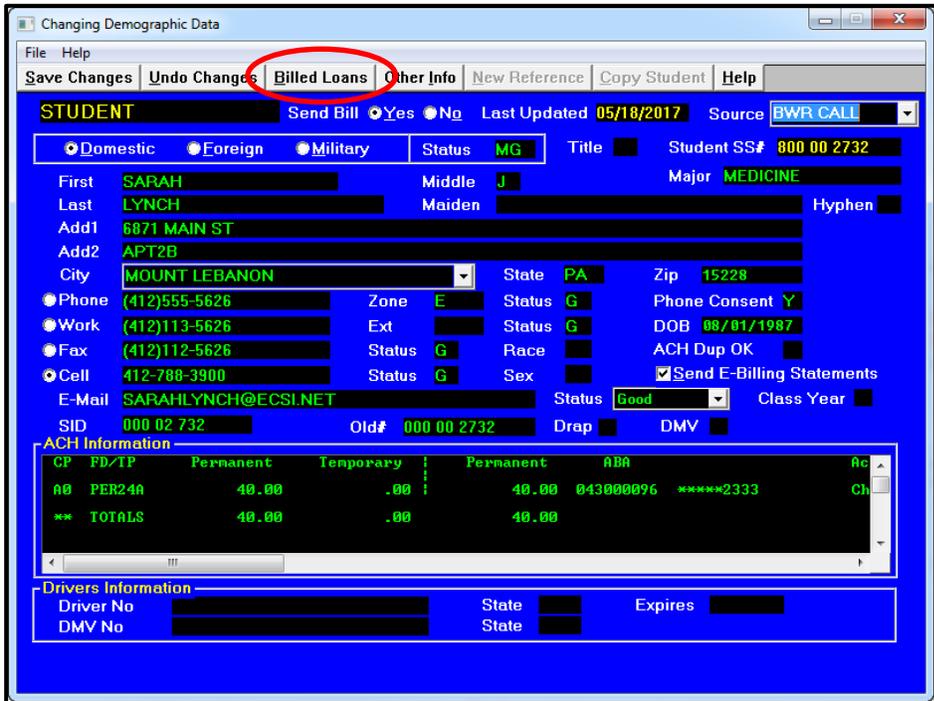
Step 1: From the **Primary Window**, click in the **Demographics** box.



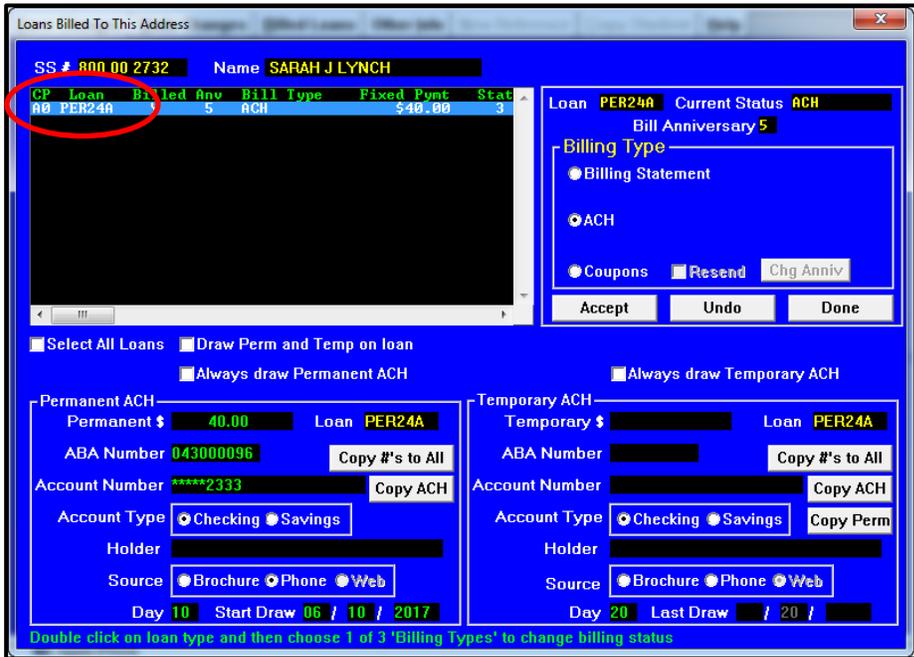
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Step 2: From the **Changing Demographic Data** screen, click the **Billed Loans** action tab.



Step 3: The **Loans Billed To This Address** window appears. Double-click the appropriate loan in the top left box.



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Step 4:	In the Billing Type box, click the Billing Statement or Coupons radio button.
Step 5:	Repeat steps 3 and 4 as necessary to remove ACH on additional loans for the borrower.
Step 5:	Click the Accept button.
Step 6:	Click the Done button.
Step 7:	The Changing Demographic Data window appears. Update the reason of the request to remove the Permanent ACH by selecting the appropriate option from the Source drop down menu.
Step 8:	Click the Save Changes action tab.
Step 9:	The Primary Window appears. Create a Memo using the Memo action tab to indicate the changes made to the borrower's account.

Note: Only ACH that has been established in SAL via brochure or phone by a SAL user can be removed. If the borrower established ACH via their account on the Heartland ECSI Website, the recurring ACH must be removed by the borrower online. ACH established online by a borrower will appear gray under the **Temporary ACH** box on the **Loans Billed To This Address** window, and the source will be marked **Web**.

Temporary ACH

Temporary \$ 40.00 Loan PER24A

ABA Number 075910206 Copy #'s to All

Account Number ****0996 Copy ACH

Account Type Checking Savings Copy Perm

Holder Natalie

Source Brochure Phone Web

Day 01 Last Draw 07 / 01 / 2114