



## What is EasyBank?

EasyBank is a PC-based software program designed to make it easier for approved state education providers to prepare electronic roster files of individuals who have taken course work to meet pre-licensing or continuing education requirements. It was designed for use in states where Promissor banks education credit information on behalf of a state regulatory department.

Essentially, a variety of demographic and other identifying information about each individual is entered into the program, either by key-entry or by importing a file that conforms to the format specifications outlined in the EasyBank User's Manual. *Each state has a specific format, so be sure to use the correct state ASCII format if you plan to use the import feature!* EasyBank performs some basic validation of the data you enter to ensure that a roster can be prepared. It then prepares an electronic roster diskette and submittal form for you to mail to Promissor along with your payment

## Where and When to Use EasyBank

At this time, approved Colorado, District of Columbia, Florida, Georgia, Maryland, Michigan, Wisconsin, and Tennessee Continuing Education providers can submit via EasyBank. **Beginning July 9, 2001, New Hampshire sponsors will begin using this program.** Even if you are an approved provider in another Promissor-serviced state, **do not send anything but Colorado, District of Columbia, Florida, Georgia, Maryland, Michigan, New Hampshire, Tennessee and Wisconsin insurance rosters** to Promissor through

EasyBank. We will notify approved providers in each state, as EasyBank becomes available in those states!

District of Columbia, Georgia, Maryland, Michigan, New Hampshire, Tennessee, and Wisconsin providers are **required** to use EasyBank for all CE credit banking activities. Please note that EasyBank only operates on an IBM-style PC. Macintosh users should have at least one IBM PC for installing the system (refer to system specifications in the EasyBank User's Manual). Mac-based registration systems that can output DOS formatted ASCII diskettes can utilize the EasyBank import/export features if desired. Note: EasyBank will not run on Windows NT or on a network (rather than a local drive.)

## Frequently Asked Questions

***1. I want to install the Easybank System and familiarize myself with its operation before actually using it. Are there any rules I should follow?***

**DO** run test data through the system! If you want to delete all the test data before you go "live," you can accomplish that one of two ways:

- Use the Locate Roster Form to select the roster(s) to delete, then select one roster at a time. Each roster will be displayed in the Roster Form screen, at which time you can select the Delete Roster button or command from the tool bar. Repeat for each roster you wish to delete. Remember that rosters can be deleted whether they have been "locked" or not!
- Reinstall the software. This will overwrite all existing files and let you start fresh! **DON'T** send any test data to Promissor!



2. *Can I import information into EasyBank directly from my student registration system?*

YES. Refer to the EasyBank User's Manual for specific instructions. The EasyBank import feature allows you to create a more automated process by outputting roster data already keyed into your student registration system. If your system can be configured to create a file in ASCII format, that information can be loaded directly into EasyBank as long as the file format matches the requirements set forth in the EasyBank User's Manual.

3. *Can I export roster information from EasyBank?*

YES. Refer to the EasyBank User's Manual for specific instructions. The EasyBank export feature allows you to export roster information in ASCII format for use in another EasyBank System, to archive rosters, or to simply have the rosters available for another system that can import ASCII data.

4. *What kind of data validation does EasyBank perform?*

EasyBank performs some routine validations as data is entered. For example, it insures that every required field has been filled out, and that the data is correctly formatted (e.g., you could not enter a seven-digit, rather than a nine-digit social security number).

If you are **importing a file**, validation occurs during the import process. If the import is successful, you will move directly into EasyBank. If the import has failed, you will receive a message to explain why it failed so that you that can correct the problem(s).

If you **key in data**, validation occurs as you enter the data in each field. For example,

you can't enter alpha characters in a numeric-only field, or invalid dates, or invalid number ranges in certain fields.

What EasyBank can NOT validate is whether a licensee ID, Social Security number, course number, provider number, etc. is correct, i.e., that it exists in the main database. This validation can only be performed when the data diskette that you provide is processed by the main education banking database. If incorrect data is identified during the banking process, then you will be notified via the activity confirmation report that is issued each time you submit a roster(s).

5. *How do I find out if my rosters were accepted? Or if there is a problem with my submission?*

Promissor generates a CE banking activity report for each provider. These reports confirm all successful banking activity and indicate if any banking requests were rejected and why they were rejected (an error code and error code key is provided). The reports are mailed first-class at least monthly to sponsors who have submitted rosters.

6. *If a roster submission has been rejected, in part or in whole, how do I resubmit the information?*

**If either certain or all students within a roster have been rejected**, you must obtain the correct information and submit it back to Promissor along with the original activity report (keep a copy for your records).

**DO NOT try to correct and resubmit another roster from the EasyBank system!** Once you have submitted a roster, we hold the banking information in "suspense" pending error resolution. If you send the same EasyBank roster on another diskette, we won't be able to make the



corrections and you will still have to submit the corrections at a later date.

**Simply mark up the provided activity report** with the corrected information, then mail it back to Promissor at the same address to which you mail your rosters. The information you submit will be entered into the system and you will receive a new activity report that verifies that the entries in question have been successfully banked into our main system.

FYI: The most frequent causes of a rejected roster, in whole or in part are:

1. invalid student licensee and/or social security number
2. invalid course number  
(causes all students to reject)
3. invalid provider number  
(causes all students to reject)

If you have **entered an incorrect provider number into the EasyBank System**, you must correct the number in the system prior to sending any further rosters for that provider. All roster information will generate error activity reports until you have keyed the correct provider number into your system.

If you receive an activity report that indicates that you have **entered incorrect course or student information into the EasyBank System** there is no need to correct this information in EasyBank itself. You are, of course, welcome to correct the information for your own records, but since you will not have to reissue that specific roster to Promissor again, maintenance of previously-submitted rosters is voluntary.

7. *Can I submit more than one roster on a diskette? Can I submit rosters from different states on the same diskette?*

Yes. Multiple rosters from the same state program are allowed, but you cannot submit more than one state program combination on a diskette. For example: this means that you CAN submit as many rosters for one state's insurance department as will fit on one diskette (each diskette typically handles thousands of student records), but you CANNOT submit rosters for two different state insurance departments on the same diskette.

EasyBank is set up to help you avoid creating rosters for different state programs on the same diskette. Before the "export" to transmission diskette process begins, you must select one state program from which to select rosters for submission. Before writing these rosters to a diskette you will receive a warning that all data on the diskette will be overwritten. If you leave the same diskette in for two state program selections, the first selection will be erased by the second selection.

8. *Once I create a roster do I have to create the submission diskette immediately?*

No. Once created, a roster can be saved, modified, and edited indefinitely until you transfer it to a submission diskette.

9. *Once I create the submission diskette what happens to the rosters I exported for submission?*

Once you have created a submission diskette (this process also creates a submittal form to mail with the diskette) the roster is assigned a transmission number and "locked" so that no further editing and/or modification can occur. All rosters submitted on one diskette are assigned the same transmission number. Each transmission number is unique. We suggest that you label your diskette with your company name and transmission number before you mail it to Promissor.



**10. Can I copy a “locked” roster to use the student information for another course roster submission?**

YES. You can copy all of the information out of a locked roster to use for another course submission. **BE ADVISED THAT YOU MUST CHANGE THE COURSE NUMBER FOR THE NEW ROSTER**, or else you will receive an error report that indicates that the whole roster was rejected as a duplicate submission.

**11. What should I do if a submission diskette is lost in the mail and never arrives at Promissor?**

In the unlikely event that you need to recreate a submission, use the “save-as” feature to copy all the affected rosters (they will be locked since you sent them once already). In this case, you will not need to change the roster’s course numbers as stated in the answer to FAQ #10 above. Simply recreate a new submission diskette and mail it along with the new submittal form that prints out to Promissor.

**12. Will Promissor return diskettes to the sender after the roster(s) has been processed?**

No. Promissor retains all diskettes as part of a retention policy for each state’s program.

**13. Can I install my EasyBank software onto multiple machines?**

YES. You may install EasyBank on as many of your own computers as you like. You may not give a copy of EasyBank to another provider, individual, or company. Please refer to your license agreement for details.

**14. What if I experience technical difficulties when installing or operating EasyBank?**

Promissor has contracted with Infinity Software Development (ISD) Corporation

to provide technical support for EasyBank software. If you require technical support, please call our toll-free support line (888) 204-6219 between the hours of 8:30 AM and 5:00 PM EST, Monday through Friday.

This number can also be found in the EasyBank application by selecting “Help” from the main menu bar, and then clicking on “About.”

**DO NOT CALL THE TECHNICAL SUPPORT LINE IF YOU HAVE A STATE OR A PROGRAM-SPECIFIC QUESTION.** Infinity is not authorized to answer such questions, nor do they have the information available to answer your question.

**15. What if I have a question regarding state requirements, submission status, etc.?**

Please call Promissor’s **New Hampshire Customer Service** support line at **(888) 877-364-8097, 8 am to 5 pm, EST**, Monday through Friday. A Client Services Representative will attempt to answer your question, or will refer you to the appropriate program direction account manager for assistance.

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*You can get additional copies of the **EasyBank FAQs** for your state by calling our FaxBack Service at (888) 204-6246, or by visiting the Promissor Web site at: <http://www.promissor.com>.*