Submitting The Catalyst Group audit confirmation requests

Use The Catalyst Group provider workflow in Circit so every request reaches the designated audit processing team.

BEFORE YOU START

- Signed Letter of Authority on file
- Full account number for each account
- Confirmation date and entity name

01 SUBMIT A SINGLE REQUEST

01
New request
From Confirmation Requests, select **New Request**.

02
Provider
Search for and select **The Catalyst Group — [PROVIDER LISTING]**.

03
Request type
Choose the type matching the account or product.

04
Team / queue
Where shown, select the correct Target Queue — for example **[TARGET QUEUE NAME]**.

05
Request details
Complete all required fields. One account number per request.

06
Create
Circit routes the request through the designated Catalyst Group workflow.

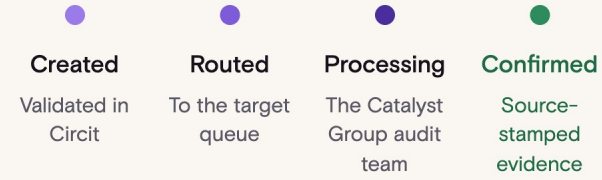
02 SUBMIT REQUESTS IN A BATCH

Multiple
Select Multiple when creating requests, then complete the information for each Catalyst Group account.

Import from CSV
For higher volumes, create requests in bulk. Each row carries the request type, routing information and one account number.

Account number required. Requests without one may be delayed or unable to be completed.

03 WHAT HAPPENS NEXT



Track status on the request in Circit — no follow-up chasing required.

No direct email submission. Do not email relationship managers, client service teams or the processing mailbox.

QUESTIONS OR ESCALATIONS

Use Circit messaging on the request, or email support@circit.io

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