ONBOARDING

The Onboarding feature encourages subscriber's not-yet-active, who have not added a payee or scheduled a payment, to add a payee and make a payment as soon as they access the CheckFree RXP bill pay tab.

Note. Sponsors implementing Fiserv from another bill pay provider typically incorporate users' existing payees; therefore the onboarding usually only applies to new enrollments.

Onboarding encourages usage by displaying:

- A guided three easy steps to add a payee
- Payee identification within payee categories with icons and payee logos
- Utilities
- Phone
- Insurance
- Credit Cards
- A search field, **Enter the name of any company or person in the U.S.**, allows subscribers to search for their payee by performing a search.
- Make their first payment(s)

Note. If a subscriber deletes all active payees, this will not result in repeating the onboarding process.

Tip. Subscribers can exit onboarding and continue with other features such as Account to Account Transfers (transfer money) via the **What else can I do?** link.

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3 Easy Steps

To complete the onboarding process, perform the following steps:

1. **Step 1** - use any of these options:

   a. Click the applicable category affiliated with the payee.
   b. Click **More Categories** and click **Add a Company** or **Add a Person**.
   c. Enter payee name in the search field.

2. Enter payee account information; e.g., account number.

   a. Enter the **Account Number**.
   b. Enter the payee's **Zip Code** (if required, based on payee).
   c. Enter a **Nickname** (if applicable).
   d. Click **Next Step**.

3. Enter payee account information; e.g., account number.

    a. Select the **Pay from** account from the drop down, if applicable.

    b. Enter the amount.

    c. Enter the payment date.

4. Select **Make Payment**.

Note. Once a payee is added, as a security feature, the subscriber receives an Internet email notification of the addition.
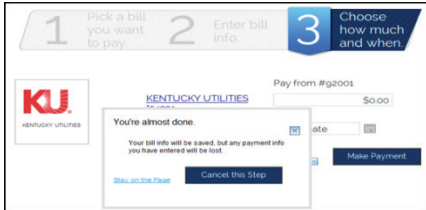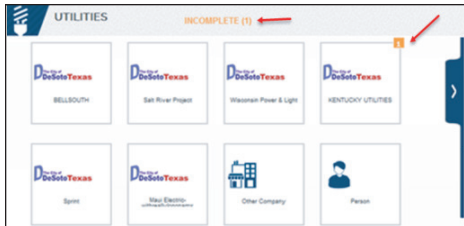
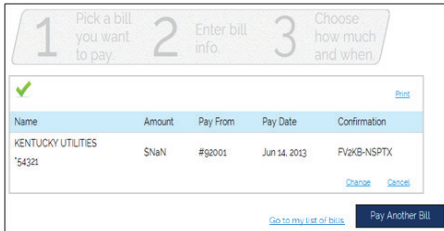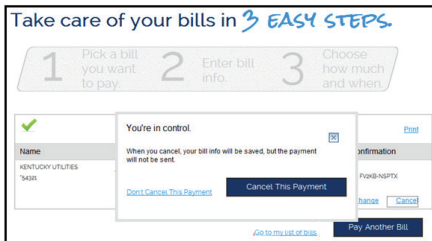| Image	Additional tips & description
	The **Finish Later** link allows the subscriber to cancel the payment. Results in **You're almost done** pop-up.
	Cancel this Step returns to onboarding Step 1 – **Pick a bill you want to pay** page. The payee information saved as incomplete.
	The category the payee resides in will display with an INCOMPLETE (#) message with a number symbol that appears next to that payee. Selecting the i ncomplete payee allows the subscriber to: - **Add another bill** - **Make a payment to:** (lists all added payees) - **View payment cancellations for:** (provides links to canceled payment details)
	Pay Another Bill repeats the 3-steps. The **Go to my list of bills** takes the user to the **Payment Center**.
	The **Cancel This Payment** link presents the subscriber with the **You're in control** screen.
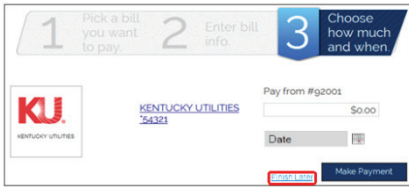
Person to Pay

The **Person** option can be used to make a payment to a payee without an account number.

Tip. The **Nickname** link can be used to add a nickname or other unique identifier for the person.

The **Address Line 2** link is used for: a suite number, Attn. to: or other required address information.

Add a Company or Person to Pay

First and Last Name

Nickname

Address Line 1

Address Line 2

City

State

State ▾

ZIP Code

Phone Number

Add Bill   Cancel