## **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.



## 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.

1	Pick a bill you want to pay.	2	Enter the info from your bill.	3	Choose how much and when.
	ar Network ame of any company or perso	nintheUS	Q	If a company can't mail a check for yo	be paid electronically, we'l
<b>€</b>	Utilities Phone				
0	Insurance				
1	Credit Cards				

- 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.

you	k a bill I want bay. 2 Enter bi info.	Choose how much and when.	May 2013 S M T W T F S 1 2 3 4 5 6 7 8 91011 12 13 14 15 16 17 18 19 20 21 22 23 24 25
KU.	KENTUCKY UTILITIES	Pay from #92001 \$0.00	26 27 28 29 30 31 June 2013 S M T W T F S
KENTUCKY UTILITIES	<u>*54321</u>	Date 💷	2 3 4 5 6 7 8 9 10 11 12 13 14 18 16 17 18 19 20 21 22 23 24 25 26 27 28 21
		Finish Later Make Payment	30 Blue dates are available Today's Date in <b>Bold</b>



**Note.** Once a payee is added, as a security feature, the subscriber receives an Internet email notification of the addition.



Image	Additional tips & description
1 Pick a bill you want 2 Enter bill 3 Choose how much and when	The <b>Finish Later</b> link allows the subscriber to cancel the payment.
Pay from #g2005 So.00 Date Mole Reyment Mole Reyment	Results in <b>You're almost done</b> pop-up.
1 Pick a bill you want to pay. 2 Enter bill 3 Choose how much and when	Cancel this Step returns to onboarding Step 1 – Pick a bill you want to pay page.
EXEMULACY UNLINES  EXEMULACY UNLINES EXEMULACY EX	The payee information saved as incomplete.
UTILITIES INCOMPLETE (1)	The category the payee resides in will display with an INCOMPLETE (#) message with a number symbol that appears next to that payee.
BELSDOM SIR Rive Higes Wassing Price S Light	Selecting the incomplete payee allows the subscriber to:
Devidenteraas Suns <u>Anna Construc</u> Constructions	Add another bill
	<ul> <li>Make a payment to: (lists all added payees)</li> <li>View payment cancellations for: (provides links to canceled payment details)</li> </ul>
1 Pick a bill 2 Enter bill 3 Choose how much	Pay Another Bill repeats the 3-steps.
You want <u>L</u> info <u>IDW Hach</u> and when      Mane <u>Amount Pay From Pay Date Confirmation</u> KENTUCKY UTLITES <u>SNaN #goos</u> Jun 14, 2013 PV2KB-NSPTX 154321 <u>Cance Cance</u> <u>Contemy List of bics</u> Pay Another Bill	The <b>Go to my list of bills</b> takes the user to the <b>Payment Center</b> .
Take care of your bills in 3 EASY STEPS.         1       Pick a bill you want to pay.       2       Enter bill info       Choose how much and when and	The <b>Cancel This Payment</b> link presents the subscriber with the <b>You're in control</b> screen.
You're in control.         Part           Name         When you cancet, your bill info will be saved, but the payment         Information           Name         Under you cancet, your bill info will be saved, but the payment         Provide saved           Scale         Don't Cancet. This Depress         Cancet. This Repress           Concet. This Depress         Cancet. This Repress         Pay Another Bill	



## **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.

-	First and Last Name	
6		
	Nickname	
	Address Line 1	
	Address Line 2	
	City	
	State	
	State	
	ZIP Code	
	Phone Number	

