D.L. Evans | **BANK**

Bill Pay

User Guide

Contents

Issue

How to setup or add eBills in Bill Pay?

Resolution

1. Click the **eBills** link in the payee row which will display the Get Your Bills Here section.

2. Click the **Request eBills** link.

3. Fill out the appropriate fields, if needed. Potential fields to fill out may include, but are not limited to, the following:

   o Last four digits of primary Social Security number

   o Five digit billing ZIP code

   o Account number (may be prefilled)

   o Last name on primary account

4. Click the **I Have Read and Agreed To The Biller's Terms and Conditions**

5. Click **Add**.

6. Repeat for each desired biller by clicking on the biller's name on the left-hand side under the Available Bills section and following steps 3 – 5.

7. Once completed, check, uncheck, or take no action on the checkbox at the bottom to agree to share your email address with selected billers and receive emails about the service.

8. Click **Submit**. A screen advising of the pending eBill request(s) will display.

Issue

How to walk a customer through cancelling a single payment in Bill Pay?

Resolution

1. There are three options to cancel a payment in Bill Pay:

   - Payment Center Send Money Section:

     1. Click **Payment Center** if not already on the Payment Center.

     2. In the Send Money section, click **Activity** in the section of the payee for which you wish to cancel the payment.

     3. Click the amount link of the payment you wish to cancel.

     4. Click **Cancel**. If the payment is part of a payment plan, you will see a drop-down menu; click **Cancel This Payment**.

     5. Click **Cancel Payment**.

   - Pending Payments Mini-Module:

     1. Click **Payment Center** if not already on the Payment Center.

     2. In the Pending Payments module, click **Cancel** beside the pending payment you wish to cancel.

     3. Click **Cancel Payment**.

   - Activity Screen:

     1. Click **Activity**.

     2. Click the row of the payment you wish to cancel.

     3. Click **Cancel**.

     4. Click **Cancel Payment**.

Issue

How to cancel AutoPay in Bill Pay?

Resolution

1. There are three options to cancel AutoPay in Bill Pay:

   o Payment Center Send Money Section:

      1. Click **Payment Center** if not already on the Payment Center.

      2. In the Send Money section, click **Activity** in the section of the payee for which you wish to cancel the payment plan.

      3. Click **Stop AutoPay**.

      4. Click **Stop AutoPay**.

   o Pending Payments Mini-Module:

      1. Click **Payment Center** if not already on the Payment Center.

      2. In the Pending Payments module, click **Cancel** beside the pending payment you wish to cancel.

      3. Click **Stop AutoPay series** in the drop-down menu.

      4. Click **Stop AutoPay**.

   o Activity Screen:

      1. Click **Activity**.

      2. Click the row of the payment you wish to cancel.

      3. Click **Cancel**.

      4. Click **Stop AutoPay Series** in the drop-down menu.

      5. Click **Stop AutoPay**.

Issue

How to cancel EZ Activation on Bill Pay?

Resolution

1. From the payee row on Payment Center, click **eBills**, then click **Cancel eBills**.

2. A confirmation screen will appear to verify that the user wants to stop the eBill Introduction. Click the **Stop eBill Introduction**

3. A confirmation screen displays confirming that they will no longer receive eBills for this biller. Click the **Close** button to return to the Payment Center.

Additional Information

- **Customer Requests to Opt-Out of EZ Activation:** This is a last resort and should only be done as a direct request. The opt-out will remove the user from the EZ Activation service. This will prevent the user from ever being auto-activated for an eBill trial in the future.
- **What is EZ Activation (also known as eBill Introduction in RXP)?:**
  - EZ Activation is an eBill introduction feature for RXP Bill Pay customers, allowing customers to try an eBill without having to turn off the paper bill. This is very similar to the existing trial eBill offering, except the new trial period eBill is automatically activated.
  - The benefit of EZ Activation is that the customer is introduced to the convenience of receiving electronic bills without having to take any steps to enter the trial period. The subscriber is already making payments and this service shows them how easy it is to also receive the bill electronically. It's a no-risk trial as the subscriber will receive both electronic and paper bills during the trial period. If the customer takes no action, the electronic bill will go away at the end of the trial period (typically 90 days).
  - RXP allows only one EZ Activation trial period for a customer at a time. A correspondence message is sent to the customer notifying them about the eBill and the trial period.

Issue

How to create a Bill Pay reminder?

Exceptions

- **eBill Reminders:** eBill customers will receive automatic reminders.

Resolution

1. Click **Reminders** located on the ribbon in the payee row on the Payment Center screen.

2. Click **Set Up Reminders**.

3. Complete the information for the reminder:

    - Typical Due Date

    - Typical Amount Due

    - Bill Received: Select a frequency

    - Remind Me in Advance: Select the timeframe for notification.

4. Enter an email address if the reminders will be sent to a different email address than the one on file.

5. Select what notifications are to be received one or all may be selected.

Issue

How to modify a payment in Bill Pay?

Resolution

1. There are three options to modify a payment in Bill Pay:

   o Payment Center Send Money Section:

      1. Click **Payment Center** if not already on the Payment Center.

      2. In the Send Money section, click **Activity** in the section of the payee for which you wish to modify the payment.

      3. Click the link displaying the amount of the payment you wish to change.

      4. Click **Change**. If the payment is part of a payment plan, you will see a drop-down menu. Click **Change This Payment**.

      5. Change the fields as appropriate and click **Save Changes**.

   o Pending Payments Mini-Module:

      1. Click **Payment Center** if not already on the Payment Center.

      2. In the Pending Payments module, click **Change** beside the pending payment you wish to change. If the payment is part of a payment plan, you will see a drop-down menu. Click **Change This Payment**.

      3. Change the fields as appropriate and click **Save Changes**.

   o Activity Screen:

      1. Click **Activity**.

      2. Click the row of the payment you wish to change.

      3. Click **Change**. If this payment is part of a payment plan, you will see a drop-down menu. Click **Change This Payment**.

Issue

How to change AutoPay options in Bill Pay?

Resolution

1. There are three options to modify a payment in Bill Pay:

    o Payment Center Send Money Section:

        1. Click **Payment Center** if not already on the Payment Center.

        2. In the Send Money section, click **AutoPay** in the section of the payee for which you wish to change the payment plan.

        3. Click **Change AutoPay Options**.

        4. Fill out or modify the appropriate fields and click **Save Changes**.

    o Pending Payments Mini-Module:

        1. Click **Payment Center** if not already on the Payment Center.

        2. In the Pending Payments module, click **Change** beside the pending payment plan you wish to change.

        3. Click **Change AutoPay Options** in the drop-down menu.

        4. Fill out or modify the appropriate fields and click **Save Changes**.

    o Activity Screen:

        1. Click **Activity**.

        2. Click the row of the desired payment that belongs to the payment plan for which you wish to change the options.

        3. Click **Change**.

        4. Click **Change AutoPay Options** in the drop-down menu.

        5. Fill out or modify the appropriate fields and click **Save Changes**.

Issue

How to pay an eBill in Bill Pay?

Resolution

1. Click **Payment Center** if not already on the Payment Center.

2. Click **eBills**.

3. Click one of the amount links to begin to make the payment. The choices are:

   o Min: Minimum amount due (may vary for credit cards)

   o Amt Due: Full amount due (may vary for credit cards)

   o Balance: Total account balance

4. The amount will auto-fill in the Amount field based upon the selection. The Deliver By date will fill in based upon the due date listed in the bill. Verify or change the entries in these fields.

5. Click **Send Money**.

6. The Review Payments screen appears showing that this payment applied to an eBill. Click **Submit Payments**.

Issue

How to set up AutoPay in Bill Pay?

Resolution

1. To set up AutoPay, click the **AutoPay** link on the payee row of the Payment Center screen.

2. Click **Set Up AutoPay**. The Manage AutoPay screen will display.

3. Complete the following information for the AutoPay:

   o Pay From: Select an account to debit from the drop-down list.

   o Amount

   o First Delivery Date: Enter date manually or select the date from the calendar.

   o Frequency: Select the frequency of the payment, weekly, monthly, etc.

   o Duration: Select how long the payments should continue by clicking on the appropriate radio button.

4. Click the **Get Email Notifications** checkbox if you would like to receive notifications. Enter the email address, and select the appropriate checkboxes.

5. Click **Start Sending Payments**. A confirmation of the Automatic Payment set up will display.

Issue

How to view my payment history in Bill Pay?

How to view activity on my Bill Pay profile?

Resolution

1. There are three options to modify a payment in Bill Pay:

    o Payment Center Send Money Section:

        1. Click **Activity** on the individual biller to expand the section and display the recent payments.

        2. Click **More Activity** to display the Activity screen. The Activity screen will display the information for that biller only.

        3. Proceed to the next step.

    o Payment Center Recent Payment Section:

        1. Click **Payment Center** if not already on the Payment Center.

        2. Click **View Activity** in the Recent Payment section to display the Activity screen.

        3. Proceed to the next step.

    o Activity Screen:

        1. Click **Activity** on the ribbon at the top of the Bill Pay screen. The Activity screen will display.

        2. Proceed to the next step.

2. Select a date range in the Date Range drop-down menu.

3. Click **Filter By** and select a filter to use in the search, if needed. The payments on this screen can be filtered by recipient name, category, status, or account. If the activity is filtered by any of these categories and the user navigates away from the Activity page and then returns to the page, the activity remains filtered by the last filter option.

4. If desired, click **Download Payment List** to download an Excel spreadsheet with a list of payments that can be saved.

Additional Information

- **Payment History:** Items remain in history for 24 months or seven years based on the financial institution's configuration