

intuit. Financial Services

Intuit Hosted Online Payments User Guide

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Table of Contents

Alerts and Notifications	4
Add an email Notification.....	4
Cancel an email Notification.....	5
Automatic Payments.....	6
Add a Standard Automatic Payment Rule	6
Add an Automatic Payment Rule based on receipt of an eBill	8
Edit an Automatic Payment Rule	11
Cancel an Automatic Payment Rule	11
eBills.....	12
Add an eBill	13
Edit an eBill.....	14
Cancel an eBill	15
File an eBill	15
Print an eBill	16
View an eBill.....	166
View eBill History.....	17
Expedited Payments	18
Add an Expedited Payment	18
Edit an Expedited Payment.....	19
Cancel an Expedited Payment	19
Funding Accounts.....	19
Add a Funding Account	20
Edit a Funding Account.....	21
Delete a Funding Account.....	22
One-time Payments	233
Add a Memo	23
Add a Note	24
Add a One-time Payment	25
Cancel a One-time Payment	26
Edit a Memo	26
Edit a Note.....	27

Edit a One-time Payment	277
Payees	28
Add a Payee.....	28
Delete a Payee.....	29
Edit Payee Information	30
Hide a Payee.....	30
Unhide a Payee.....	311
View Payee Information.....	32
Payment History	32
Download Payment History.....	322
Print Payment History	333
View and Search Payment History	344
Reminders	366
Add a Reminder	366
Edit a Reminder	377
Cancel a Reminder	388
Frequently Asked Questions.....	400
How do I pay someone new?.....	400
Why can't I edit my payee's address?	400
Are there any types of payments I can't make?.....	400
How are payments processed?	411
When will the funds be taken from my account?	411
What is an eBill?	411
How long do you store my eBills and payment history?.....	422
Can I choose which notifications are sent to me?	422
How do I manage my payees?	422

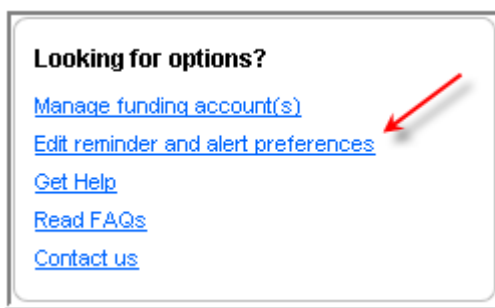
Alerts and Notifications

To keep you informed, we send several types of email *Alerts* and *Notifications* that are triggered by various events.

Add an Email Notification

Locate the *Looking for options?* box under the *Receipt Area* on the main payment page.

1. Click the **Edit reminder and alert preferences** link.



Result: You will be taken the *Reminders and Alerts* page.

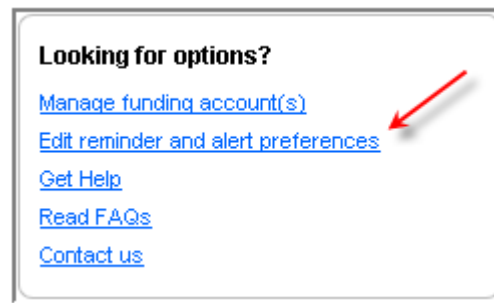
The image shows a screenshot of a web form titled 'Next due reminder'. The form is divided into two sections: 'Security' and 'Ebills'. Under 'Security', there is a 'Notify me when:' label followed by two checked checkboxes: 'Payee Added' and 'Payee Edited'. Under 'Ebills', there is a 'Notify me each day if:' label followed by one checked checkbox: 'Bill Received'. The form has a light gray background and a thin border.

2. Click the unchecked **checkboxes** that are associated with the *Alerts* and *Notifications* you want to enable.
 - A check mark indicates that an *Alert* or *Notification* is turned on.
 - Some *Alerts* and *Notifications* are grayed out and cannot be unchecked. These are important messages that we will always send if the corresponding events occur. We display them on this page to let you know which actions will trigger an email.
3. Click the **Save** button at the bottom of the page.

Result: Your changes will be confirmed.

Cancel an Email Notification

Locate the *Looking for options?* box located under the *Receipt Area* of the main payment page.



1. Click the **Edit reminder and alert preferences** link.

Result: You will be taken the *Reminders and Alerts* page.

The image shows a form titled 'Next due reminder'. It is divided into two sections: 'Security' and 'Ebills'. Under 'Security', there is a label 'Notify me when:' followed by two checked checkboxes: 'Payee Added' and 'Payee Edited'. Under 'Ebills', there is a label 'Notify me each day if:' followed by one checked checkbox: 'Bill Received'. The form has a light gray border and a white background.

2. Click the **checkboxes** that are associated with the *Alerts* and *Notifications* you want to stop receiving.
 - A check mark indicates that an *Alert* or *Notification* is turned on.
 - A checkbox without a check mark indicates that an *Alert* or *Notification* is turned off.
 - Some *Alerts* and *Notifications* are grayed out and cannot be unchecked. These are important messages that we will always send if the corresponding events occur. We display them on this page to let you know which actions will trigger an email.
3. Click the **Save** button at the bottom of the page.

Result: Your changes will be confirmed.

Automatic Payments

Automatic payments make paying your bills a snap!

Set up an automatic payment, and we will automatically schedule and send your payments according to your specific instructions.

Don't worry. You are always in control! We will notify you each time a payment is scheduled, and you can edit or cancel your payments at any time.

There are two types of automatic payments:

- *Standard Automatic Payment*: Tell us how much, how often and when to start, and we will do the rest.
- *Automatic Payment based on eBill*: Sign up for an *eBill*, and we can automatically pay your bill for you, using the amount and due date of your bill. Custom rules allow you to stay in complete control.

Add a Standard Automatic Payment Rule

To add a *Standard Automatic Payment*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's Options* button. 

Result: The *Options window* will open.

2. Click on the **Automatic payment** tab on the left side of the *Options window*.

My Payee *2451
Pay from: [Checking1](#) ▼

Send On: mm/dd/yy [calendar icon] \$0.00 **Pay** [OPTIONS](#) ▲

Automatic payments: Currently Off

Next due reminder

Automatic payment

Expedited payment

Account Information

Not paying this anymore?
[Delete it](#) | [HIDE](#) [Hide it](#)

Pay from: [Checking1](#) ▼

Amount: \$0.00

Frequency: [Once a month](#) ▼

Start on: mm/dd/yy [calendar icon] [What should I select?](#)

End on: No end date
 mm/dd/yy [calendar icon]

Memo: (optional) [text input] (Used if payment is sent by check. [Learn more](#))

Save [Don't make changes](#) [Questions?](#) ▼

▲ close ▲

Note: If an *eBill* is available for your *Payee*, you will be given two options:

- Use my bill information to determine the date and amount.
- Don't use my bill information.

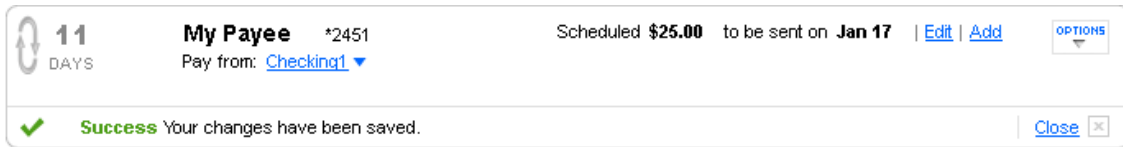
To set up a *Standard Automatic Payment* that is not based on your *eBill*, click on the **Don't use my bill information** radio button.

3. Fill out the information in the form.
 - a. Select the desired *Funding Account*.
 - b. Set the *Amount* you want to pay.
 - c. Set the *Frequency*, how often you want the payment to occur.
 - d. Set the *Start on* date, the date when you want us to send your first payment.
 - e. Set the *End on* date, the date when you want us to stop making payments. You can choose *No end date* instead of setting an *End on* date.
 - f. Provide a *Memo* (optional). *Memos* are included on payments that are made by check. We automatically include your name and account number on any check payment we send, so you do not need to include this information in your *Memo*.
4. Click the **Save** button.

Results

- Your changes will be confirmed.
- Your first payment will be scheduled.
- Your *Payee tile* will update to show:

- A recurring payment icon
- A countdown to the next payment date
- The date and amount of your next scheduled payment



Add an Automatic Payment Rule Based on Receipt of an eBill

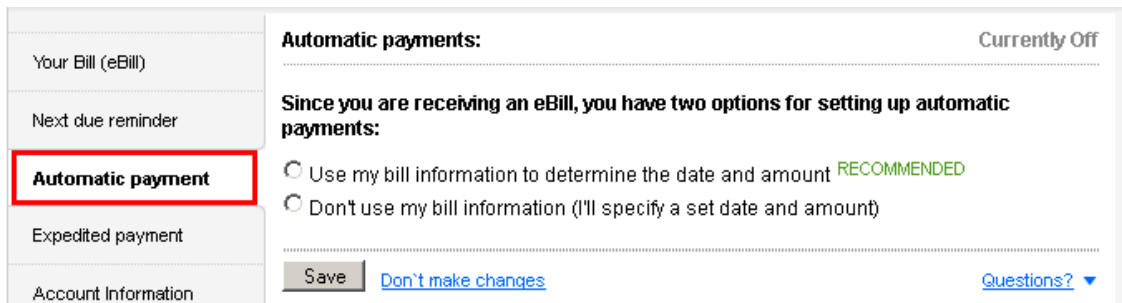
For any *Payee* that you have set up to receive an *eBill*, you can set up an *Automatic Payment Rule* that is based on the due date and amount of each bill.

To add an *Automatic Payment Rule based on receipt of an eBill*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's Options* button. 

Result: The *Options window* will open.

2. Click on the **Automatic payment** tab on the left side of the *Options window*.



3. Click on the **Use my bill information to determine the date and amount** radio button.

If you are not signed up for an *eBill*, you will be directed to the *eBill* enrollment screen.

Result: A form will display your options for setting up an *Automatic payment based on your eBill*.

4. Fill out the information in the form.

- a. Set the amount you want to pay. You have three options:
 - i. Pay the full balance of the bill.
 - ii. Pay the minimum amount that is due.
 - iii. Create your own custom rule.

- b. Set the date for us to make the payment. You have two options:
 - i. Send the payment as soon as the bill arrives.
 - ii. Send the payment a set number of days before the due date.
Make sure to schedule the payment in time for it to be received before the due date.

- c. Provide a *Memo* (optional). *Memos* are included on payments that are made by check. We automatically include your name and account number on any check payment we send, so you do not need to include that information in your *Memo*.

You can create *Custom Rules* that tell us how much you want to pay, depending on the amount that is due. *Custom Rules* always follow this format: "If the bill amount is less than X, do Y. If the bill amount is greater than or equal to X, do Z."

Here are two examples of *Custom Rules*:

- "If my bill is less than \$100.00, pay the full balance. But if my bill is greater than or equal to \$100.00, pay only the minimum that is due."
- "If my bill is less than \$200.00, pay the minimum that is due. But if my bill is greater than or equal to \$200.00, pay nothing and notify me by email."

Your Bill (eBill)

Next due reminder

Automatic payment

Expedited payment

Account Information

Not paying this anymore?

[Delete it](#) | [Hide](#) [Hide it](#)

Automatic payments: Currently Off

Since you are receiving an eBill, you have two options for setting up automatic payments:

Use my bill information to determine the date and amount RECOMMENDED

Don't use my bill information (I'll specify a set date and amount)

Pay from:

Amount:

Always pay full balance on my bill

Always pay minimum due on my bill

Create my own rule

If less than <input type="text" value="\$100.00"/>	Or If greater/equal to \$100.00
<input checked="" type="radio"/> Pay full balance <input type="radio"/> Pay minimum due <input type="radio"/> Pay <input type="text" value="\$0.00"/> <input type="radio"/> Pay nothing and send email	<input checked="" type="radio"/> Pay full balance <input type="radio"/> Pay minimum due <input type="radio"/> Pay <input type="text" value="\$0.00"/> <input type="radio"/> Pay nothing and send email

Send payment: days prior to due date (allow 2-3 business days)

When the bill arrives

Memo: (optional) (Used if payment is sent by check. [Learn more](#))

[Don't make changes](#)
[Questions?](#) ▼

5. Click the **Save** button.

Results

- Your changes will be confirmed.
- Your *Payee tile* will update to show a recurring payment icon.

Note: The *Automatic Payment Rule* will take effect upon the arrival of your **NEXT** eBill.

Edit an Automatic Payment Rule

To edit an automatic payment, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click on the **Automatic payment** tab on the left side of the *Options window*.

Result: Your *Automatic Payment Rule* will be displayed.

3. Change the information that you want to update.

Note: If you are editing a *Standard Automatic Payment Rule*, you will have to change the *Start on* date to a date in the future.

4. Click the **Save** button.

Results

- Your changes will be confirmed.
- If you are editing a *Standard Automatic Payment*, your *Payee tile* will update to reflect your next payment.
- If you are editing an *Automatic Payment based on eBill*, the changes will take effect upon receipt of your **NEXT eBill**.

Cancel an Automatic Payment Rule

To cancel an automatic payment, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click on the **Automatic payment** tab on the left side of the *Options window*.

3. Click the **Turn off** link in the upper right corner.

Automatic payments: Currently On | [Turn off](#)

Next due reminder

Automatic payment

Expedited payment

Account Information

Not paying this anymore?

[Delete it](#) | [Hide](#) | [Hide it](#)

Pay from:

Amount: [What if it varies?](#)

Frequency:

Start on: [What should I select?](#)

End on: No end date

Memo: (optional) (Used if payment is sent by check. [Learn more](#))

[Don't make changes](#) [Questions?](#)

close

4. Click the **Yes** button to confirm your cancellation request when you are prompted.

Results

- Your changes will be confirmed.
- Any payments that are associated with that rule will be canceled.
- Your *Payee tile* will update and no longer show a recurring payment icon, a countdown to the next payment date or information about your next payment.

eBills

An *eBill* is an electronic copy of your bill, which you can view anytime within the Bill Pay service.

eBills are a secure and convenient way to keep all of your bills in one place. We'll let you know when your *eBills* arrive, and we'll help you keep track of when they are due so you'll never have a late payment.

Signing up for an *eBill* doesn't mean that we will automatically pay your bill for you, but we can if you want. We offer flexible *Automatic Payment Rules* that allow you to stay in control of when and how we make your payments.

Add an eBill

If your *Payee* is eligible to receive an *eBill*, a *Get eBill* link will appear in the *Next Due* section of your *Payee tile* when you interact with that *Payee*.

To add an *eBill*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Get eBill** link or **Options** button.



Result: The *Options window* will open directly to the *Your Bill (eBill)* tab.

2. Provide the requested information.
 - a. You will always be asked to set the billing cycle (how often you receive the bill).
 - b. In some cases, we will ask for your user ID and password, and any security questions and answers that are required to access the site. This is because our system will access the *Payee's* site to obtain your bill.

Note: If you do not have an online account with the *Payee*, please visit the *Payee's* website and create an online account. Otherwise, we will not be able to display and track your bill for this *Payee*.

- c. In some cases, we will ask for other information to help determine that you are the owner of the account, such as the amount of the last bill, the

ZIP code where you receive your bill or the last four digits of your Social Security number.

3. Click the **Get your eBill delivered here** button.

Results

- A success message will be displayed.
- A *Setting up eBill* message will appear in the *Next Due* section of the *Payee tile*.
- The *Your Bill (eBill)* tab in the *Options window* will display a message that indicates that your *eBill* enrollment is in process.

Note: It could take up to two billing cycles for the *eBill* enrollment to be completed.

Edit an eBill

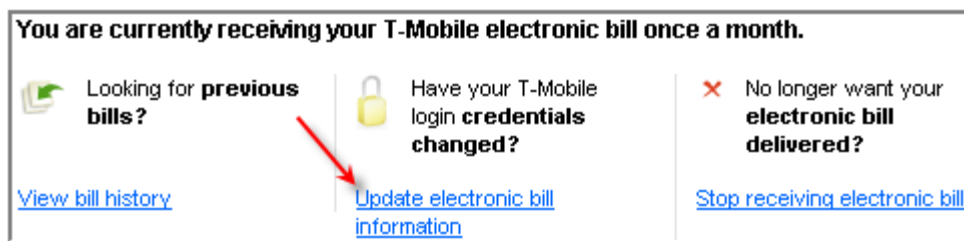
An *eBill* will be editable only if we use your user ID and password at the biller’s website to obtain a copy of your bill. If you change your password or your challenge questions or answers at the biller’s website, you will have to update the information with us so we can continue to obtain your *eBill*.

To edit your *eBill* information, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee’s Options* button. 

Result: The *Options window* will open directly to the *Your Bill (eBill)* tab.

2. Click on the **Update eBill information** link. **Note:** This link will not appear if your *eBill* is not editable.



Result: A form will appear and prompt you to provide the information we need to access the biller’s site. This information should be the same as it was when you enrolled for the *eBill*.

3. Fill out the form and click the **Save** button.

Result: Your information will be updated, and a success message will be displayed. There will not be any interruption in the delivery of your *eBill*.

Cancel an eBill

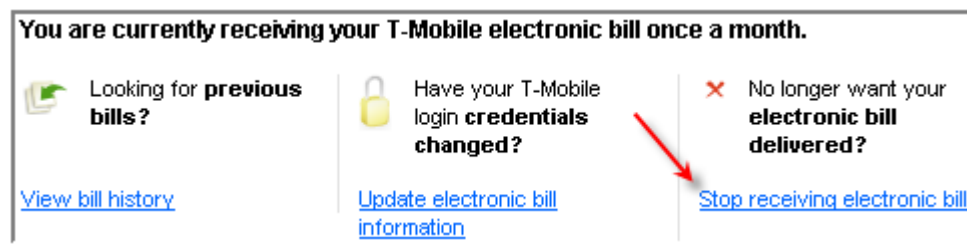
If you wish to stop receiving an *eBill* through this service, you can unsubscribe at any time. **Note:** In some instances, it could take up to two billing cycles for you to stop receiving the *eBill*.

To cancel an *eBill*, locate the *Payee* in your *Payee list* and do the following:

1. Click your *Payee's* **Options** button. 

Result: The *Options window* will open directly to the *Your Bill (eBill)* tab.

2. Click on the **Stop receiving electronic bill** link.



Result: A pop-up will prompt you to confirm your *eBill* cancellation.

3. Click on the **Yes, stop my eBill** button.

Result: A success message will be displayed.

File an eBill

Filing an *eBill* is especially handy if you make a payment to a *Payee* outside of this service or receive an *eBill* that has a \$0.00 balance due.

Normally, after an *eBill* arrives and you make a payment to the *Payee*, we mark the bill as *Paid* and update the *Next Due* section of your *Payee tile* to display "Waiting for bill..." If you make a payment to a *Payee* outside of this service, we would not know about it and we would continue to count down to the due date in the *Next Due* section of your *Payee tile*. Eventually, the countdown would change to show that your payment is overdue, but since you did make a payment, the payment is not actually overdue.

Clicking the **File** link in the *Next Due* section of your *Payee tile* will move the *eBill* into your bill history and reset the *Next Due* section to “Waiting for bill...”



You can also file your *eBill* from the *My Bills* history page.

1. Navigate to the *My Bills* history page.
2. Locate the bill in the history table and click the **File** button in the **Status** column.

Result: The *Status* of the bill will be updated to *Filed*.

Print an eBill

To print a copy of your *eBill*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click on the **View bill history** link.

Result: The *My Bills* history page will open.

3. Locate the bill you wish to print in the history table and click its corresponding **View** link. If you do not see the bill you are looking for, you may need to expand the date range of the search.

Result: The *eBill* will open in a new browser tab

4. Use your browser's print function to print a copy of the bill.

View an eBill

To view your most recently received *eBill*, locate the *Payee* in your *Payee list* and do the following:

Click the **View bill** link in the *Next Due* section of your *Payee tile*.

Result: The *eBill* will open in a new browser tab.

Note: Once you have made a payment on your most recent bill, or the bill has been filed, the *View bill* link will not appear on your *Payee tile*.

To view past bills or bills that have been paid or filed, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click on the **View bill history** link.

Result: The *My Bills* history page will open.

3. Locate the bill you wish to print in the history table and click its corresponding **View** link. If you do not see the bill you are looking for, you may need to expand the date range of the search.

Result: The *eBill* will open in a new browser tab.

View eBill History

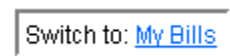
To view a history of all *eBills* you have received, do the following:

1. Click on the **View payment history** link at the top of the *Receipt Area*.



Result: The *My Payments* history page will open.

2. Click on the **Switch to: My Bills** link in the upper left corner of the page.



Result: The *My Bills* history page will open and display the past two months of your *eBill* history.

If you do not see the bill you are looking for, expand the date range of your search. We retain your *eBills* for 24 months.

Expedited Payments

An *Expedited Payment* is a next-day (overnight) payment.

If an *Expedited Payment* is scheduled before today's cutoff time, we will be able to deliver the payment to the *Payee* the following business day.

We can make an *Expedited Payment* to just about any of your payees either electronically or via an overnight check.

Note: Overnight check payments cannot be sent to Hawaii, Alaska or P.O. boxes.

Add an Expedited Payment

To set up an *Expedited Payment*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button.



Result: The *Options window* will open.

2. Click on the **Expedited payment** tab on the left side of the *Options window*.

Result: The *Expedited Payment* options and setup form will be displayed.

Note: If we can deliver a standard payment to the *Payee* in the same amount of time, we will not offer the *Expedited Payment* option.

3. Fill out the form.
 - a. For an overnight electronic payment, enter the amount of the payment and the desired *Funding Account*.
 - b. For an overnight check payment, you must also provide the address to which the payment is to be delivered. In many cases, this will be the same address that you provided for regular payments. But some billers receive overnight payments at a different processing center. Check your bill or contact your biller directly to get overnight payment instructions.
4. Click the **Make payment** button.

Result: A confirmation page will display all of the payment details. Please verify that the *Deliver by* date meets your expectations.

5. Review the payment details.
 - a. To change the payment information, click the **Edit information** button.
 - b. To cancel the payment request, click the **Cancel payment** button.
6. To schedule the payment, click the **Make payment** button.

Results

- Your *Expedited Payment* will begin processing immediately and will appear in the *Recently processed payments* section of the *Receipt Area*.
- The *convenience fee* will be scheduled separately and will appear in your history within the next few days.

Note: Because we start processing your *Expedited Payment* request immediately, it cannot be edited or canceled once it has been added.

Edit an Expedited Payment

Because we start processing your *Expedited Payment* request immediately, it cannot be edited or canceled once it has been added.

Cancel an Expedited Payment

Because we start processing your *Expedited Payment* request immediately, it cannot be edited or canceled once it has been added.

Funding Accounts

A *Funding Account* is the account that we debit money from when we make a payment on your behalf.

Add a Funding Account

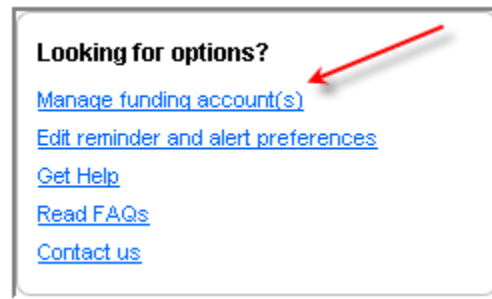
Note: When adding a *Funding Account* to this service, only checking or share draft accounts can be used.

Adding a *Funding Account* is a two-step process.

- **Step 1:** Provide account information. Once the account information has been provided, we will make two small deposits to that account.
- **Step 2:** Wait at least two business days for us to make two small deposits to your account. Then, validate your account by confirming the amounts we deposited.

Step 1

To add a *Funding Account*, locate the *Looking for options?* box under the *Receipt Area* of the main payment page.



1. Click on the **Manage funding account(s)** link.

Result: *My funding account(s)* page will be displayed.

2. Click the **Add account** button near the bottom of the screen.

Result: The *Add account* form will be displayed.

3. Fill out the form.
 - a. Provide the *Name* of the financial institution where the account is held.
 - b. Provide a *Nickname* for your account so it can be easily identified.
 - c. Provide your *Account number*.
 - d. Provide the *Routing and Transit Number* (RTN) for the financial institution where the account is held.
4. Click the **Add account** button.

Results

- The new account will be displayed in your list of *Funding Accounts*.

- The account will have a *Validate* link, but the link will not be clickable yet.

Step 2

After you complete Step 1, we will make two small deposits to the account you are adding. The deposits will take at least two business days to appear in your account.

After waiting at least two business days, check the history of the account you are adding and obtain the amounts we deposited. Come back to this service and do the following:

1. Navigate to the *My funding account(s)* page and locate the newly added account in your list of accounts.
2. Click the **Validate** link.

Result: A pop-up will prompt you to enter the amounts of the two deposits we made to your account.

3. Enter the amounts of the two deposits and click the **Validate** button.

Results

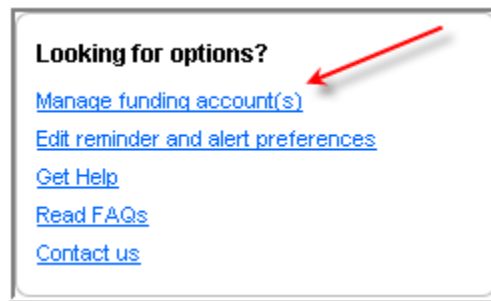
- A success message will appear.
- *Edit* and *Delete* links will appear next your account.
- You will be able to use this account to make payments.

Note: You have only three attempts to enter the correct amounts. If you enter incorrect amounts three times, the account will no longer appear in your account list.

Edit a Funding Account

The only element of a *Funding Account* that is editable is the *Nickname* that you use to identify the account.

To edit the *Nickname* of a *Funding Account*, locate the *Looking for options?* box under the *Receipt Area* of the main payment page.



1. Click on the **Manage funding account(s)** link.

Result: The *My funding account(s)* page will be displayed.

2. Click the **Edit** button that corresponds to the account you would like to edit.

Result: The *Edit account details* pop-up will appear.

3. Change the account *Nickname* and click **Save**.

Result: A success message will display and your *Funding Account* will be displayed using the new *Nickname*.

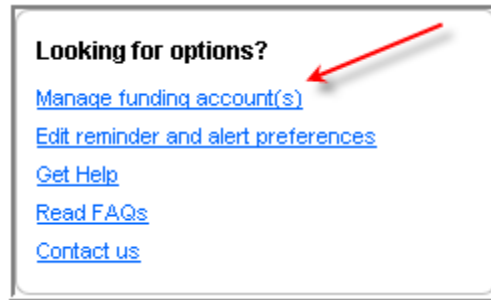
Delete a Funding Account

If you no longer plan to make payments from one of your *Funding Accounts*, you can delete it.

An account cannot be deleted if:

- It is the only *Funding Account* you have
- It is your *Default Funding Account*
- The *Funding Account* is being used for any scheduled payments
- The *Funding Account* is associated with an *Automatic Payment Rule*

To delete a *Funding Account*, locate the *Looking for options?* box under the *Receipt Area* of the main payment page.



1. Click on the **Manage funding account(s)** link.

Result: The *My funding account(s)* page will be displayed.

2. Click the **Delete** button that corresponds to the account you would like to delete.

Result: A confirmation pop-up will appear.

Note: If the account is associated with any scheduled payments or *Recurring Payment Rules*, they will be displayed so you can make note of them. Those scheduled payments or *Recurring Payment Rules* must be associated with a different account or deleted before this *Funding Account* can be deleted.

3. Click the **Delete account** button to complete the account deletion.

Results: A success message will appear, and the account will be removed from your account list.

One-time Payments

Add a Memo

When scheduling a payment, you can add a *Memo*. *Memo* information will be included with the payment only if we make the payment by check. When making a payment by check, we always include your name and account number on the check, so there is no need to add this information in your *Memo*.

To include a *Memo* with your payment, do the following:

1. When adding your payment information on the *Payee tile*, prior to clicking the *Pay* button, click the **Memo** link under the *Pay* button.

Result: The *Memo* entry pop-up will appear.

2. Type your *Memo* and click the **Save** button.

Result: The *Memo* entry pop-up will close.

3. Enter the payment's *Send On* date and *Amount* (if you have not already done so) and click the **Pay** button.

Result: The payment will be scheduled.

Note: You can add or edit a *Memo* for a scheduled payment by editing the payment if it has not begun processing. The *Memo* field will be available only if the payment is being made by check.

Add a Note

You can add a *Note* to any payment to help you keep track of the payment's details. *Notes* are only for your viewing and are never sent to *Payees*.

To add a *Note* to a scheduled payment, do the following:

1. Locate the payment in the *Scheduled payments* section of the *Receipt Area* and click its corresponding **edit** icon. 


Result: The edit payment pop-up will appear.

2. Type a *Note* in the *Note* section and click the **Save changes** button.

Results

- The edit payment pop-up will close.
- Your *Note* will be saved.
- A confirmation message will appear in the *Receipt Area*.

To add a *Note* to a payment that is in process or has been completed, do the following:

1. Locate the payment in the *Recently processed payments* section of the *Receipt Area* or on the *My Payments* history page and click its **view** icon. 

Result: The view payment pop-up will appear.

2. Type a *Note* in the *Note* section and click the **Save & Close** button.

Result: Your *Note* will be saved.

Add a One-time Payment

To add a one-time payment, locate the *Payee* on your *Payee list* and do the following:

1. Type in a *Send on* date or click on the **calendar** icon to select a date using our calendar widget.

Note: Using our calendar widget makes it easy for you to determine when a payment can be sent and how long it will take to be delivered. Valid *Send on* dates will be displayed in black. Invalid dates (non-business days such as weekends and federal holidays) will be displayed in gray.



2. Type in the *Amount* of the payment.
3. Add a *Memo* (if desired) by clicking on the **Memo** button. The *Memo* will be included only if the payment is made by check.
4. Click the **Pay** button.

Results

- The payment will be scheduled.

- A success message will appear, along with a payment *confirmation number*.

Cancel a One-time Payment

To cancel a one-time payment, do the following:

1. Locate the payment in the *Scheduled payments* section of the *Receipt Area* and click its corresponding **cancel** icon. 

Result: A confirmation pop-up will appear.

2. Click the **Yes, Cancel Payment** button.

Results

- The payment will be canceled and removed from the list of scheduled payments.
- A confirmation will appear at the top of the *Receipt Area*.

Note: If you click the delete icon for a payment that is part of an *Automatic Payment Rule*, you will be asked if you want to cancel that single payment, or the entire *Automatic Payment Rule*.

Edit a Memo

To edit the *Memo* for a scheduled payment, do the following:

1. Locate the payment in the *Scheduled payments* section of the *Receipt Area* and click its corresponding **edit** icon. 

Result: The edit payment pop-up will appear.

2. Type a *Note* in the *Note* section and click the **Save changes** button.


Results

- The edit payment pop-up will close.
- Your *Note* will be saved.
- A confirmation message will appear in the *Receipt Area*.

Note: Once a payment begins processing, the payment *Memo* will no longer be editable.

Edit a Note

To edit a *Note* for a scheduled payment, do the following:

1. Locate the payment in the *Scheduled payments* section of the *Receipt Area* and click its corresponding **edit** icon. 


Result: The edit payment pop-up will appear.

2. Update the *Note* in the *Note* section and click the **Save changes** button.

Results

- The edit payment pop-up will close.
- Your *Note* will be saved.
- A confirmation message will appear in the *Receipt Area*.

To edit a *Note* for a payment that is in process or has been completed, do the following:

1. Locate the payment in the *Recently processed payments* section of the *Receipt Area* or on the *My Payments* history page and click its **view** icon. 

Result: The view payment pop-up will appear.

2. Update the *Note* in the *Note* section and click the **Save & Close** button.

Result: Your *Note* will be saved.

Edit a One-time Payment

A scheduled payment can be edited up until the time it begins to process.

To edit a scheduled one-time payment, do the following:

1. Locate the payment in the *Scheduled payments* section of the *Receipt Area* and click its corresponding **edit** icon. 

Result: The edit payment pop-up will be displayed.

2. Update the payment information that you want to change. You can edit the following information:
 - a. *Send on date* (Use the calendar widget to select a valid date.)
 - b. *Amount*
 - c. *Funding Account*
 - d. *Category*
 - e. *Memo*
 - f. *Note*
3. Click the **Save changes** button.

Results: The payment information will be saved, and a confirmation will appear in the *Scheduled payments* section of the *Receipt Area*.

Payees

Add a Payee

To add a new *Payee*, do the following:

1. Type the name of the *Payee* you would like to add in the *Need to pay someone new?* field near the top of the screen.

The screenshot shows a form with the label "Need to pay someone new?". The input field contains the text "american express". To the right of the input field is an "Add" button. A dropdown menu is open below the input field, displaying the suggestion "American Express Credit Cards".

Note: As you type, we will try to match the name you are typing to a *Payee* that we know. If the name of the *Payee* you are adding appears in the drop-down, click the name to select it. If the name does not appear in the drop-down, finish typing the name of your *Payee*.

2. Click the **Add** button.

Result: A pop-up will prompt you to enter information about the *Payee*.

3. Fill out the form. We will ask for some or all of the following information:
 - a. Your *Account number* with the biller

- b. ZIP code of the address to which you mail payments to the *Payee* (found on your bill)
 - c. The complete mailing address of the *Payee*
4. Click the **Add payee** button.

Results: The *Payee* will be added to the top of your *Payee list*, and a success message will appear. After the next page refresh, the *Payee* will appear in the appropriate sort order.

Delete a Payee

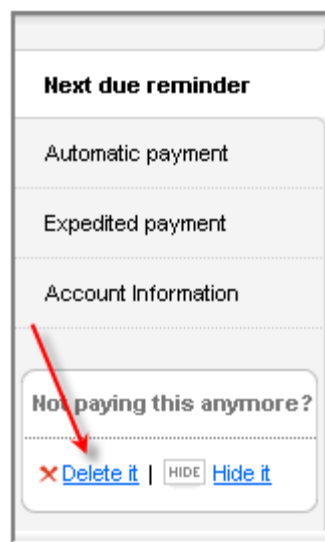
If you no longer plan to make payments to a *Payee*, you can delete the *Payee* from your *Payee list*. Deleting a *Payee* will cause all future payments to that *Payee* to be canceled. If there is a chance that you may want to make payments to this *Payee* in the future, we suggest that you hide the *Payee* instead of deleting it.

To delete a *Payee*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee*'s **Options** button. 

Result: The *Options window* will open.

2. Click on the **Delete it** link at the bottom of the *Options window*.



Result: A pop-up will prompt you to confirm the delete request.

3. Click the **Yes – Delete** button.

Results

- The *Payee* will be removed from your *Payee list*.
- All scheduled payments for that *Payee* will be deleted.

Edit Payee Information

If any of a *Payee’s* information has changed, you can update it.

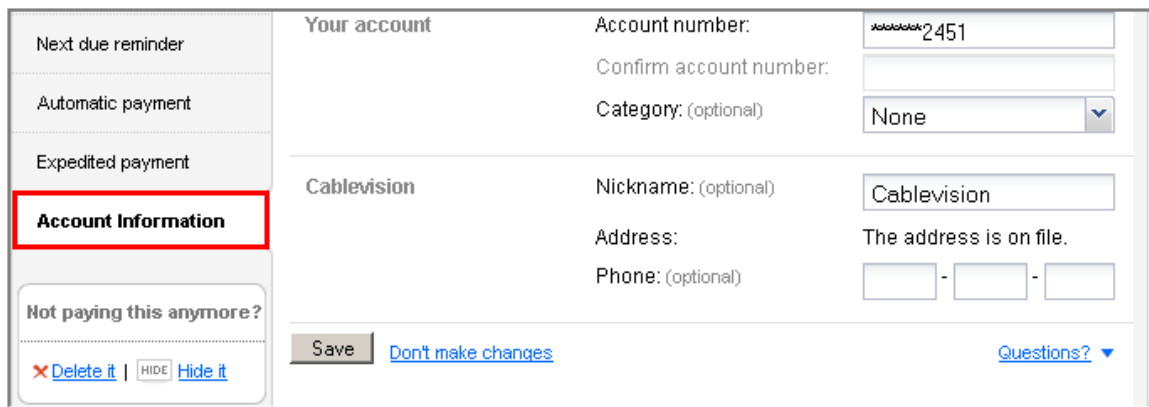
To edit a *Payee’s* information, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee’s* **Options** button. 

Result: The *Options window* will open.

2. Click on the **Account Information** tab on the left side of the *Options window*.

Result: A form that contains your *Payee’s* information will appear.



Next due reminder	Your account	Account number:	XXXXXXXXXX2451
Automatic payment		Confirm account number:	
Expedited payment		Category: (optional)	None
Account Information	Cablevision	Nickname: (optional)	Cablevision
Not paying this anymore?		Address:	The address is on file.
Delete it Hide it		Phone: (optional)	
		Save Don't make changes	Questions?

3. Update the information and click the **Save** button.

Results: Your *Payee’s* information will be updated, and a success message will appear.

Hide a Payee

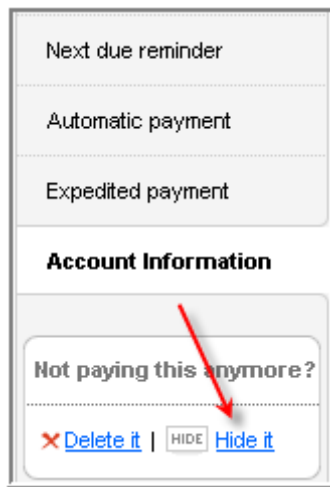
To help control the length of your *Payee list*, you can hide *Payees* that you do not pay very often. You can bring *Payees* back into your list anytime. Any scheduled payments will continue to process while *Payees* are hidden.

To hide a *Payee*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click on the **Hide it** link at the bottom of the *Options window*.



Results: The *Payee* will be removed from your *Payee list*, and the number on the *hidden* link at the top of the page will increase by one.



Unhide a Payee

To unhide a *Payee*, do the following:

1. Click the **Hidden** link near the top of the page.

Result: A drop-down will display the hidden *Payees*.



2. Click on the name of the *Payee* that you would like to unhide.

Result: The *Payee* will appear at the top of your *Payee list*. After the next page refresh, the *Payee* will appear in the appropriate sort order.

View Payee Information

To view the information that we have on file for one of your *Payees*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click on the **Account Information** tab on the left side of the *Options window*.

Result: The *Payee's* information will be displayed.

Next due reminder	Your account	Account number:	<input type="text" value="****2451"/>
Automatic payment		Confirm account number:	<input type="text"/>
Expedited payment		Category: (optional)	None <input type="button" value="v"/>
Account Information	Cablevision	Nickname: (optional)	<input type="text" value="Cablevision"/>
Not paying this anymore?		Address:	The address is on file.
<input type="button" value="x Delete it"/> <input type="button" value="HIDE"/> <input type="button" value="Hide it"/>		Phone: (optional)	<input type="text"/> - <input type="text"/> - <input type="text"/>
	<input type="button" value="Save"/>	Don't make changes	Questions? <input type="button" value="v"/>

Payment History

Your payment history is searchable, and we retain the information online for 24 months.

Download Payment History

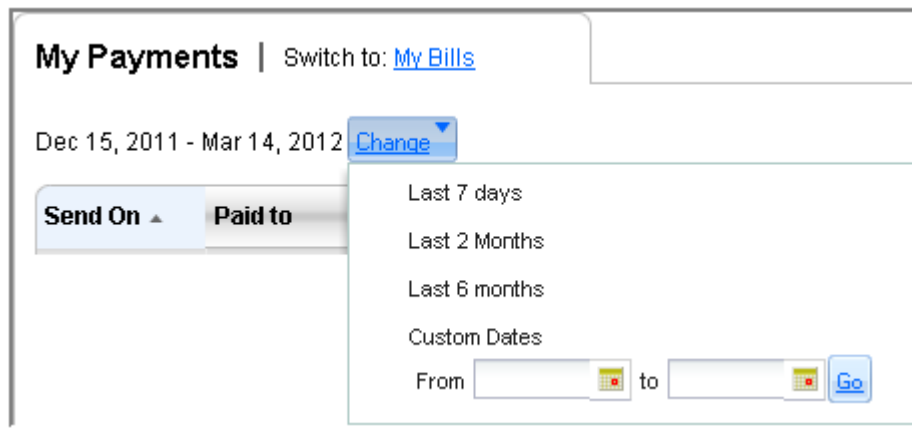
To download your payment history, do the following:

1. Click the **View payment history** link at the top of the *Receipt Area*.



Result: The *My Payments* history page will be displayed. The table will show transactions from the default date range: two months in the past and one month in the future.

2. If you do not see the desired transactions in the table, you can expand the date range of the search by clicking on the **Change** link and selecting a preset date range, or by providing a custom date range.



3. Once the data that you would like to export is displayed in the history table, click the **Download** link near the upper right corner of the screen.



4. You will be prompted to select a program to open the file, or to save the file to your default download location. Make a selection and click **OK**.

Result: The file will open or be saved, depending on your selection.

Note: Your payment history will be exported to a comma-separated value (CSV) file format. We will offer more format options soon.

Print Payment History

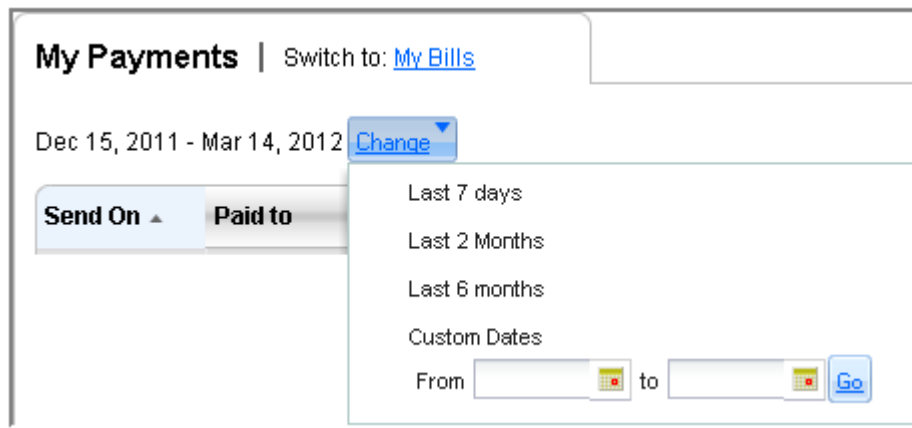
To print your payment history, do the following:

1. Click the **View payment history** link at the top of the *Receipt Area*.



Result: The *My Payments* history page will be displayed. The table will show transactions from the default date range: two months in the past and one month in the future.

2. If you do not see the desired transactions in the table, you can expand the date range of the search by clicking the **Change** link and selecting a preset date range, or by providing a custom date range.



3. Once the data that you would like to print is displayed in the history table, click the **Print** link near the upper right corner of the screen.



Result: A new window will open and give you a preview of what will be printed.

4. In the "print preview" window, click the **Print** link in the upper right corner.

Result: Your payment history will be printed.

View and Search Payment History

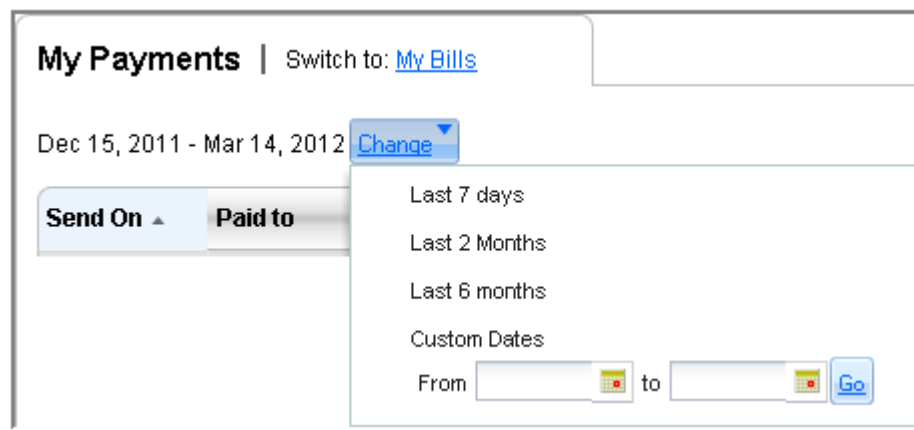
To search your payment history, do the following:

1. Click the **View payment history** link at the top of the *Receipt Area*.

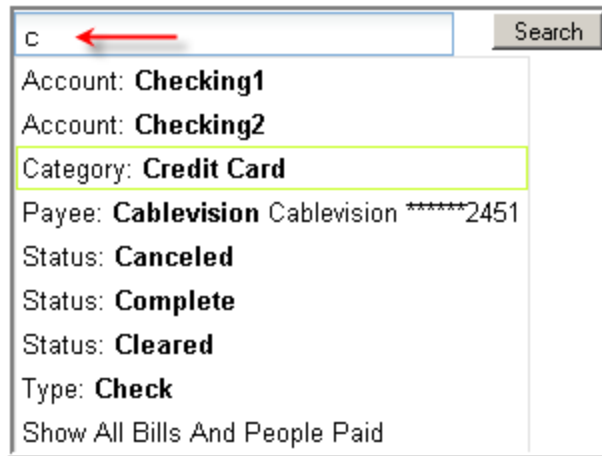


Result: The *My Payments* history page will be displayed. The table will show transactions from the default date range: two months in the past and one month in the future.

2. If you do not see the desired transaction in the table, you can expand the date range of the search by clicking the **Change** link and selecting a preset date range, or by providing a custom date range.



3. Once you have selected the appropriate date range for your search, you can use a *Search Payment History* filter to filter the results in the table. To filter your search results, do the following:
 - a. Start typing what you are looking for, and we will list any matches in the table below. We will match your search to:
 - *Payee Name*
 - *Payee Nickname*
 - *Paid from* account
 - *Transaction Status*
 - *Payment Type*
 - *Payment Category*
 - b. Select the desired filter from the drop-down box.
 - c. Click the **Search** button.



Result: The information in the history table will be updated to show only data that matches the filter you selected.

Reminders

A *Reminder* is a simple way to never forget when your next payment is due. We'll count down the number of days until the next payment is due, display the information in bold type next to your payee's name when you log in, and send you an email alert 10 days before the due date.

Be assured that a *Reminder* is just that — a reminder. We will not automatically pay your bill for you unless you specifically tell us to do so.

Add a Reminder

You can add a *Reminder* for any *Payee* that you do not pay via *eBills* or an *Automatic Payment Rule*.

To add a *Reminder*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click the **Next due reminder** tab.

Note: In some instances, the *Options window* will open directly to the *Next due reminder* tab.

3. Provide the required information.
 - a. Enter the *Frequency* of your payments to the *Payee*.
 - b. Enter the *Next due* date.
4. Click the **Save** button.

Results


- A success message will be displayed.
- The *Next Due* section of your *Payee tile* will begin counting down the days to the *Next due* date.

Note: When you schedule a payment for a *Payee* that you do not pay via *eBills* or an *Automatic Payment Rule*, we will display a payment confirmation and a prompt that will offer to set up a *Reminder*.

To add a *Reminder* from the prompt, adjust the *Next due* date using the calendar widget (if necessary) and click the **Save** button. This will create a *Reminder* with a monthly *Frequency*.

Edit a Reminder

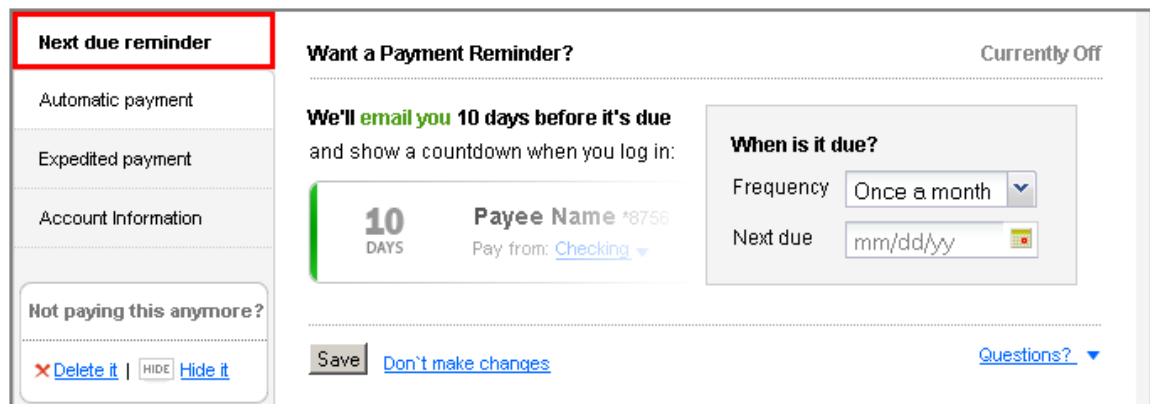
To edit a *Reminder*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click the **Next due reminder** tab.

Note: In some instances, the *Options window* will open directly to the *Next due reminder* tab.




3. Update the reminder information:
 - The *Frequency* of your payments to this payee
 - The *Next due* date
4. Click the **Save** button.

Results

- A success message will be displayed.
- The *Next Due* section of your *Payee tile* will show the new *Next due* date.

Cancel a Reminder

To cancel a *Reminder*, locate the *Payee* in your *Payee list* and do the following:

1. Click the *Payee's* **Options** button. 

Result: The *Options window* will open.

2. Click the **Next due reminder** tab.

Note: In some instances, the *Options window* will open directly to the *Next due reminder* tab.

3. Click the **Turn off** link in the upper right corner.

The screenshot shows a user interface for managing payment reminders. On the left, there is a sidebar with options: 'Automatic payment', 'Expedited payment', and 'Account Information'. Below this is a section titled 'Not paying this anymore?' with links for 'Delete it' and 'Hide it'. The main content area is titled 'Next due reminder' and includes a 'Want a Payment Reminder?' section. A green banner indicates '10 DAYS' until the payment is due. The 'Payee Name' is *8756 and the payment is from 'Checking'. A 'When is it due?' section shows a frequency of 'Once a month' and a next due date of '03/13/12'. In the top right corner, the status is 'Currently On' with a blue 'Turn off' link highlighted by a red arrow. At the bottom, there are 'Save' and 'Don't make changes' buttons, and a 'Questions?' dropdown menu.


Results

- A success message will be displayed.
- The *Next Due* section of your *Payee tile* will no longer show a *Next due* date.

Frequently Asked Questions

How do I pay someone new?

Adding a new payee is simple. Just type the name of the person or company in the *Need to pay someone new?* field and click **Add**.



We'll ask for some information, like your account number and the address that you use to send your payments. Fill out the form and click the **Add payee** button, and you're ready to make a payment.

Note: If you don't have any payees set up or you have just a few, we will suggest some common payees at the bottom of the page. If you see one that you need to pay, click the payee's name to begin the adding process.

Why can't I edit my payee's address?

When you're adding a payee (or trying to edit a payee's information later), don't be alarmed if we don't ask you for an address to send your payments to. This just means that either we pay the payee electronically (and don't need a mailing address) or the payee asks us to send payments to an address that might not match the address that appears on your bill.

Are there any types of payments I can't make?

Due to legal requirements, we limit the ability to make certain types of payments. Payments to payees outside the United States are prohibited and may not be issued under any circumstances. In addition, the following types of payments are discouraged but may be scheduled at your own risk:

- Tax payments to the Internal Revenue Service or any state or other government agency
- Court-ordered payments, such as alimony or child support
- Payments to insurance companies

We will not warn you if you attempt to make any of these types of payments, and we will not be liable if we do not make a prohibited or discouraged payment that you've scheduled.

How are payments processed?

We issue two kinds of payments: electronic and check.

When scheduling a payment to a payee that we pay electronically, please select a *send date* that is at least three days before the due date. When scheduling a payment to a payee that we pay by check, please select a *send date* that is at least five days before the due date.

Use our calendar widget to see when a payment will be delivered, based on the *send date* you choose.



When will the funds be taken from my account?

Funds will be debited from your *Funding Account* within two days of the payment's *send date*. Make sure that you have sufficient funds in your account. An NSF (insufficient funds) return will cause your Bill Pay account to be blocked. While your account is blocked, all scheduled payments will be canceled.

What is an eBill?

An *eBill* is an electronic copy of your bill, which you can view anytime within the Bill Pay service.

eBills are a secure, convenient way to keep all of your bills in one place. We'll let you know when each *eBill* arrives, and we'll help you keep track of when they're due so you'll never have a late payment.

How long do you store my eBills and payment history?

We make the past 24 months of your payment history and *eBills* available for you to view online. If you need payment information from more than 24 months back, give us a call. We'll help to retrieve that information.


Can I choose which notifications are sent to me?

We send many types of notifications via email to keep you informed and up-to-date regarding your payments. Some notifications are crucial and can't be turned off, but there are many others that you can choose to turn on or turn off.

To view or change your notification settings, click the **Edit reminder and alert preferences** link in the *Looking for options?* box at the bottom of the *Receipt Area*.

A box with a check mark indicates that the corresponding notification is turned on, and a box without a check mark indicates that the notification is turned off.

How do I manage my payees?

We make managing your *Payees* a snap. Find the *Payee* in your *Payee list* and click on the corresponding **Options** button. 

The *Options window* will open, allowing you to:

- Sign up for, edit or cancel *eBills* (if *eBills* are available for that *Payee*)
- Add, edit or delete a payment *Reminder*
- Set up, edit or delete an *Automatic Payment Rule*
- Add or edit your *Payee* account information
- Hide the *Payee* to manage the length of your *Payee list*
- Delete the *Payee* if you no longer plan to make payments to that *Payee*